NET CREDIBILITY SCORE (NCS)

A NEW METRIC FOR MEASURING THE EFFECTIVENESS OF IMPACT ADVERTISING

February 2026

INNOVATING TO IMPACT

dentsu

CONTENTS

FOREWORD

Over the past three to four years, sustainability (ESG) has been far more prominent in marketing communications than it is today. In 2026, AI has taken over that dominate communication position. Only the true believers remain: marketing professionals who, with conviction and against the current, continue to work passionately on meaningful and sustainable change.

This highly engaged group works tirelessly to bring more sustainable experiences, products and services to consumers' attention. So far, with limited effect, because "people do not predominantly make sustainable choices, although there is support for them," as Milieu Centraal states in its most recent Monitor.

We believe one of the potential solutions lies in making these sustainability-driven marketers more effective, as well as activating, inspiring and supporting many more marketers.

For both groups, we have good news.

Marketers who already use advertising for social / sustainable impact face a communication barrier between themselves and the consumer. For marketers starting in organisations in transition, our solution can help too in taking their first steps.

The solution? The NCS, or Net Credibility Score. This is a scientifically validated metric (proven in Belgium) that measures the effectiveness of impact (societal and sustainable) advertising. It was developed by Bubka (a B Corp) in collaboration with Ghent University and now brought to the Dutch Creative and Media industry.

In this whitepaper, you will learn all about it — as well as about our NCS research conducted among 6.000 Dutch consumers and 160 brands & organisations.

Kind regards,
dentsu Social Impact team

Antoine Mes
Sustainability Manager dentsu Benelux

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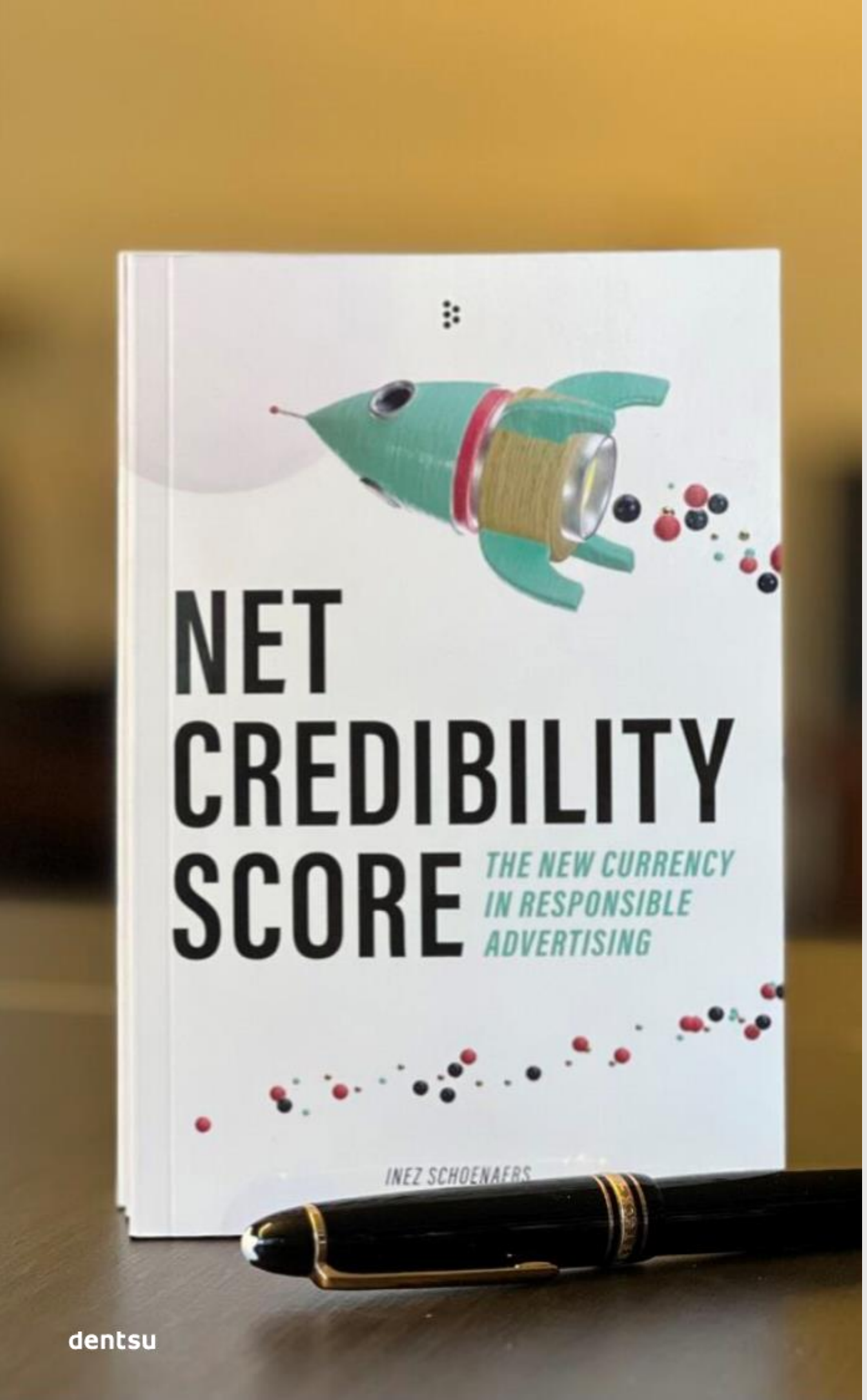
INTRODUCTION TO NCS



INTRODUCTION

Social Impact at dentsu

We launched this initiative from within the dentsu Social Impact team — a group of motivated, sustainability-driven thinkers and doers working across all service lines of our organisation. Every day, we focus on our own (internal) sustainability efforts while advising colleagues and clients alike.

We have conversations with marketers in a variety of business & industries and believe they can gain more inspiration and fulfilment from their work when they use their knowledge and expertise to drive meaningful societal change. Our team is not alone: we collaborate with a wide network of social and societal organisations and experts. Through this network, we hope to inspire, enable and support them.

Our introduction to Bubka (B Corp)

In 2023, we connected with Wim Vermeulen - a well-known speaker and author from Antwerp specializing in sustainable marketing communication. During this inspiring conversation, he explained the urgency and opportunity behind what he calls the “demand change”: stimulating consumer demand for more sustainable solutions by making them better known, more attractive and more accessible, so that choosing sustainable and socially responsible options becomes effortless for everyone.

His book Speak Up Now! Marketing in Times of Climate Crisis gained widespread attention in podcasts and trade media. Alongside it, he introduced an innovative new metric: the Net Credibility Score (NCS). From the perspective of the consumer or citizen, it objectively measures how effective a societal or sustainability-focused advertising message truly is — a powerful and highly relevant innovation.

Fast-forward to 2026

We saw an opportunity to energize the marketing and communication sector and help scale the NCS movement. At the time of writing, the first Dutch NCS benchmark has been launched, supported by industry organisations such as PIM (Platform Innovation in Marketing), bvA (Dutch Advertisers Association), and VIA (the industry association for media and advertising). Media partners (Bauer Media Group, JCDecaux, Global, Talpa and Hecht) and fellow agencies Havas Lemz, TheTerrace, Publicis Groupe Netherlands and TBWA joined the initiative.

Together with the NCS metric and the underlaying drivers every marketer should have the tools to create controlled progress through their impact advertising.

KEY DEFINITIONS

On the terminology we use

As you read through this whitepaper, you will encounter several terms: impact communication, sustainable advertising, impact campaigns. These variations are used simply to improve readability — they all refer to the same concept. Impact advertising is a form of communication that is wholly or partly aimed at promoting ecological or social progress. This also applies to the people you aim to reach. While we mostly refer to them as consumers, these terms only tell part of the story. The NCS also applies to other roles people fulfil, such as citizens, volunteers, donors, and supporters.

When is something considered impact advertising?

If the message of an advertisement aligns with the intent and/or desired outcomes of the 17 United Nations Sustainable Development Goals (SDGs), it falls within our definition of impact advertising. In principle, this type of communication is medium-agnostic, but for our research we focused on TV and Out-of-Home (OOH) executions — two commonly used advertising channels.

Impact advertising supports (or is part of) what Cambridge University, an authority in **the field of sustainable marketing, describes as sustainable marketing.**

Definition of Cambridge University: *"Sustainable marketing is therefore about far more than marketing sustainability. Marketing shapes business and society, and sustainable marketing accepts and embraces accountability for doing so. In order to get to a truly sustainable marketing paradigm, we need creative leaders who can blend existing expertise with fresh mindsets, new skills, scientific understanding, and a deeper sense of connection to society and nature."*

Bubka — inventor of the NCS — defines impact communication as follows:

"Impact communication is a communication approach designed to drive meaningful change, influence behavior and/or demonstrate organisational impact. Using the 17 Sustainable Development Goals (SDGs) as an analytical framework, we ensure comprehensive coverage across social, environmental, and economic dimensions."

Examples of impact communication:

- Retailers encouraging consumers to buy or exchange second-hand products more often
- Animal-welfare organisations campaigning against mistreatment
- Government communication promoting responsible behavior
- Banks protecting consumers against phishing
- Food companies providing free food to people in need
- Charities addressing issues related to poverty

CREDIBILITY

Why credibility matters

Building brand consideration requires consistent messaging over time. We marketers are familiar with this and are therefore continuously evaluating campaign results. Impact advertising works differently and therefore needs to be measured differently.

It is valuable to understand this fundamental difference, before or diving deeper into the optimization of campaigns. Impact communication, often blends commercial and societal messaging — and that can create confusion, because businesses have no track record of creating positive impact. This confusion tends to manifest as a lack of credibility. The same applies, albeit to a lesser extent, to purely societal communication by NGO's, charities, governments or any other impact maker.

Acknowledging this credibility gap, means a change in how we create, measure and optimize campaigns. See credibility as a new lens to look through. Our research shows that Credibility of communication is highly influential: it drives consumer motivation by 57% and brand consideration by 30%!

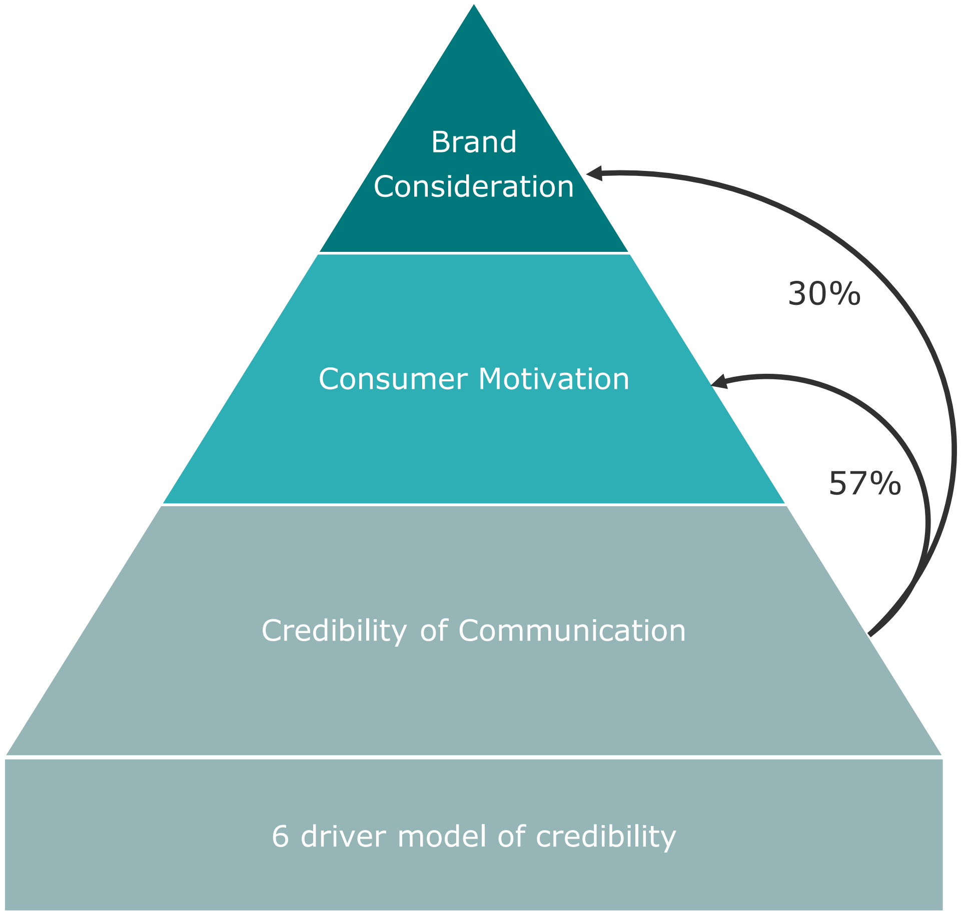
One size doesn't fit all.

You may wonder: isn't effectiveness already being measured? Indeed it is. One form of effectiveness measurement is brand tracking. A brand tracker measures how consumers perceive and associate a brand — often focusing on brand awareness and brand consideration. Sustainability associations are also frequently included. However, a brand tracker tells you how the consumer views the brand, but not how that credibility was formed over time. It acts as a compass, but not as a route planner.

From short-term value to long-term impact

In the short term, credibility creates value by increasing brand consideration and motivating people to choose your products or solutions. In the long term, it helps stimulate demand for more sustainable products, services and experiences. When this shift endures, credibility becomes a source of lasting value for brands, for people, and for society. Credibility is therefore not a "soft" value, but a measurable source of impact.

The credibility impact model:



THE FUNDAMENTAL INSIGHT

Brands face a "credibility gap‟:

1. Businesses have no track record of creating positive impact
2. Consumers are hearing non-commercial (different) stories from brands
3. Their response system is out of sync

These challenges are also experienced by institutions, governmental bodies, charities and NGOs.

Definition of the NCS:

"The Net Credibility Score (NCS) is a scientifically validated index that measures the perceived credibility of impact communication among consumers and serves as a benchmark for the impact of campaigns on consumer motivation and brand consideration."

MEASURING CREDIBILITY

Calculating the NCS is easy:

NCS = % - %

%	→	% consumers/citizens that strongly disagree and somewhat disagree with your message
%	→	% consumers/citizens that strongly agree and somewhat agree with your message

Is the NCS positive?

Congrats, you are on to something! Use the driver model for higher positive impact

FROM SCORE TO INSIGHT

In-depth insights

While the NCS expresses the effectiveness of an execution in a single score, it doesn't immediately reveal if the score is high or low compared with others. To learn something, marketers might also want to know why that score is high or low. This is where the deeper application of the NCS comes in.

The NCS score is the outcome of a set of interconnected drivers. These drivers explain the underlying reasons:

- *Why do people believe the message, somewhat or not?*
- *What aspects contribute to skepticism or trust?*
- *Which driver is the most influential?*

If you want to understand the effectiveness of an impact advertising message, you measure it using the NCS. An NCS Scorecard provides additional insights to the NCS and explains the relativity of the score compared to the market, benchmark, SDG's or any other datapoint.

Scientific foundation

The Net Credibility Score (NCS) and its underlying insights are rooted in Belgian scientific research conducted by Bubka, a certified B Corp, in close collaboration with Ghent University. From the outset, the ambition was clear: to build a credibility metric that is not only practically relevant for marketers, but also methodologically rigorous and scientifically sound. To ensure this level of robustness, both the research methodology and its findings were subjected to independent peer review by communication scientists.

This process culminated in the publication of the scientific paper on Frontiers, one of the world's leading open-access scientific publishing platforms. Publication on Frontiers marks an important milestone, as it confirms that the research meets internationally recognized academic standards. The article has generated significant global attention and is within the top 5% of articles engaged on the platform, enabling our message to spread to every continent. This level of engagement is a strong signal that the academic community recognizes the growing relevance of credibility as a foundational concept in responsible and impact-driven advertising.

View paper

THE SIX DRIVERS OF CREDIBILITY

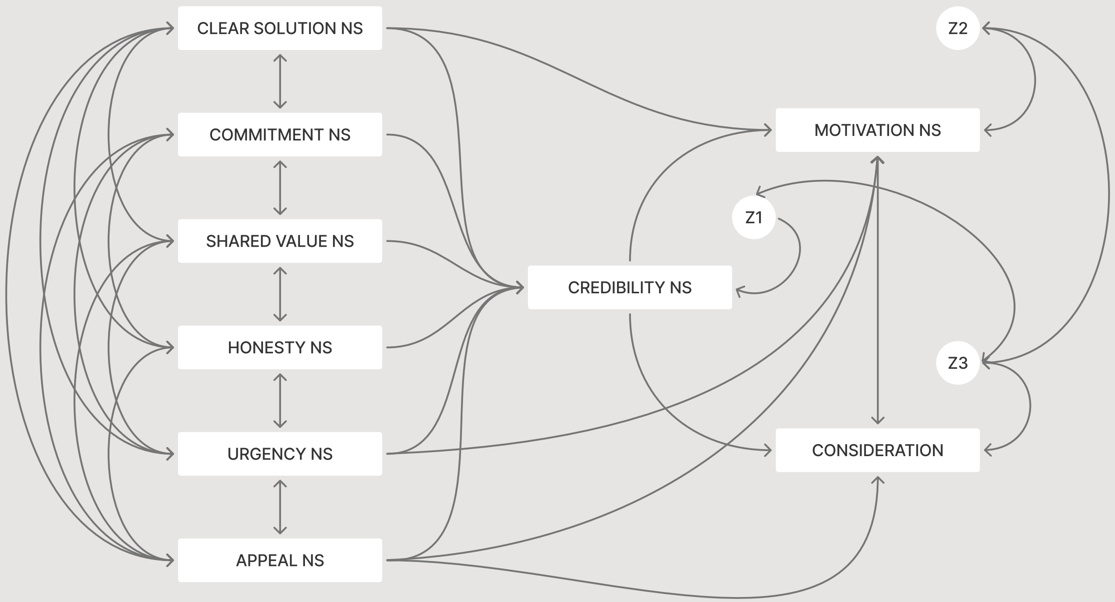
As illustrated in the visual, the Net Credibility Score is built around six interconnected drivers that together explain how credible impact communication is perceived.

These drivers - Honesty, Commitment, Appeal, Shared Value, Urgency and Clarity - do not operate in isolation.

Rather, they reinforce one another and jointly determine whether an impact message is trusted, believed and acted upon.

In chapter 5, we take a deeper look at each driver and how to use it effectively.

Drivers are interdependent:



Honesty
Is the message transparent, realistic, and supported by evidence?

Commitment
Does the brand demonstrate that it is genuinely dedicated to the stated goal — and how does the audience feel this?

Appeal
Is it clear what the added value is for the audience? Does the message resonate on an emotional, functional or social level?

Shared Value
Does the message align with what people themselves consider important?

Urgency
Is it clear why action is needed now?

Clarity
Is the message clear, concrete and easy to understand?

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NCS BENCHMARK

NCS BENCHMARK OVERVIEW

The Dutch NCS Benchmark

By now, you are familiar with the NCS and its underlying drivers. But how does the score of your campaign or execution compare to those of (anonymous) others? That is where the benchmarking, utilizing the NCS drivers, is used, but there is more…alongside the NCS measurements, we also conducted consumer research. This chapter covers both.

The Benchmark: Context is king

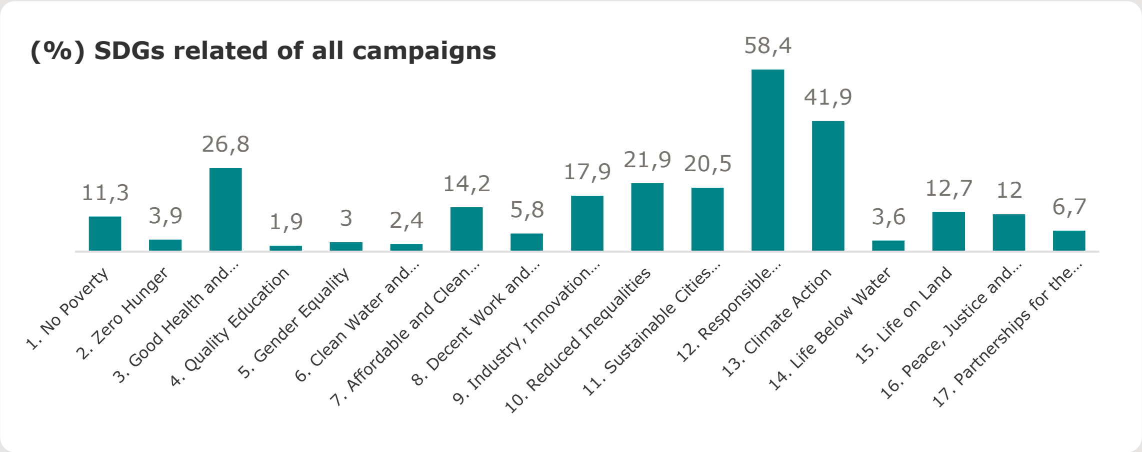
A metric means nothing without context. As noted earlier, the NCS allows for optimization. Even more insightful is comparing them with the benchmark average, your industry, or the best-scoring SDG. The benchmark contains respondent data directly linked to an individual execution of an organisation.

The Dutch NCS benchmark consists of 200 advertisements from 160 different organisations, measured among a representative sample of 6,000 Dutch consumers. The selection includes executions that appeared in public space (Out-of-Home) or on TV between January 2024 and March 2025. The benchmark covers campaigns from major brands and government bodies, as well as from smaller NGOs, impact scale-ups, B Corps and charities.

Industry Classification

To maintain comparability with Bubka’s original Belgian research, the advertisements have been categorized into the following industries: Consumer durables, Non-profit & public sector, Housing & construction, Retail, Energy, Banking & insurance, Telecom & media, Food & beverages, Household & personal products and Automotive & mobility.

All executions included in the benchmark align with one or more SDGs in terms of message or intent. When constructing the benchmark, we ensured that all 17 SDGs were represented. This was not straightforward in practice — not every SDG receives equal advertising attention. The relative distribution of SDGs (in %) compared to the total selection is shown in the accompanying chart.



Nuances

We measure at execution level. Some organisations operate across multiple categories or industries, meaning credibility can vary per execution and per industry. The medium also influences results.

We see that NCS scores are generally higher for pure TV executions than for static Out-of-Home. This can be explained by the richer communication possibilities of TV compared to static OOH. Digital Out-of-Home moves closer to TV in that regard. Both media types offer significant value, but their effectiveness depends on creative choices, campaign strategy, reach objectives and budget considerations.

The average NCS in NL of 200 ads is...

15%

42,2% (credible) - 27,2% (not credible)

THE AVERAGE NCS SCORE

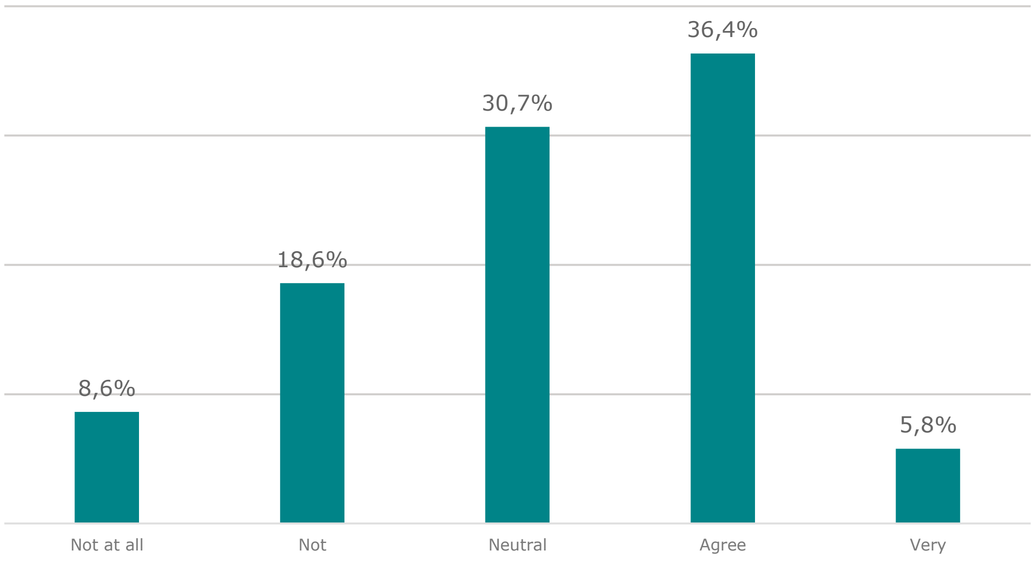
Our benchmark research shows that the average Net Credibility Score (NCS) across all campaigns is 15%. In concrete terms, this means that only 15% more respondents found the evaluated advertisements credible rather than not credible. This outcome is like the results observed in Belgium a few years earlier.

The score is composed of:

- 42.2% (36,4% + 5,8%) of respondents who found the advertisements credible or very credible
- 27.2% (8,6% + 18,6%) who found them hardly or not credible at all

The neutral group (respondents without a clear opinion) is excluded from this calculation and represents 30.6% of the total.

CREDIBILITY OF DUTCH IMPACT COMMUNICATION (%)



BENCHMARK INSIGHTS

In the run-up to this publication, we spoke with many marketers and communication professionals about the NCS. The enthusiasm for it has been – and still is – considerable. However, there is also, an expected, reluctance for organisations to speak open and candidly about their inspiration, motives and advertising.

However, there are several organizations (in the Top 20) who have been fully transparent sharing their inspiration, motives and advertising strategy. We would like to publicly congratulate and recognize them for their partnership and involvement.

Our thanks and congratulations go to: Gamma, Justdiggitt, Renewi, Ekoplaza and Tefal. The winner of the first edition of the NCS benchmark has been secured by: Marktplaats (Adevinta).

Work still to be done

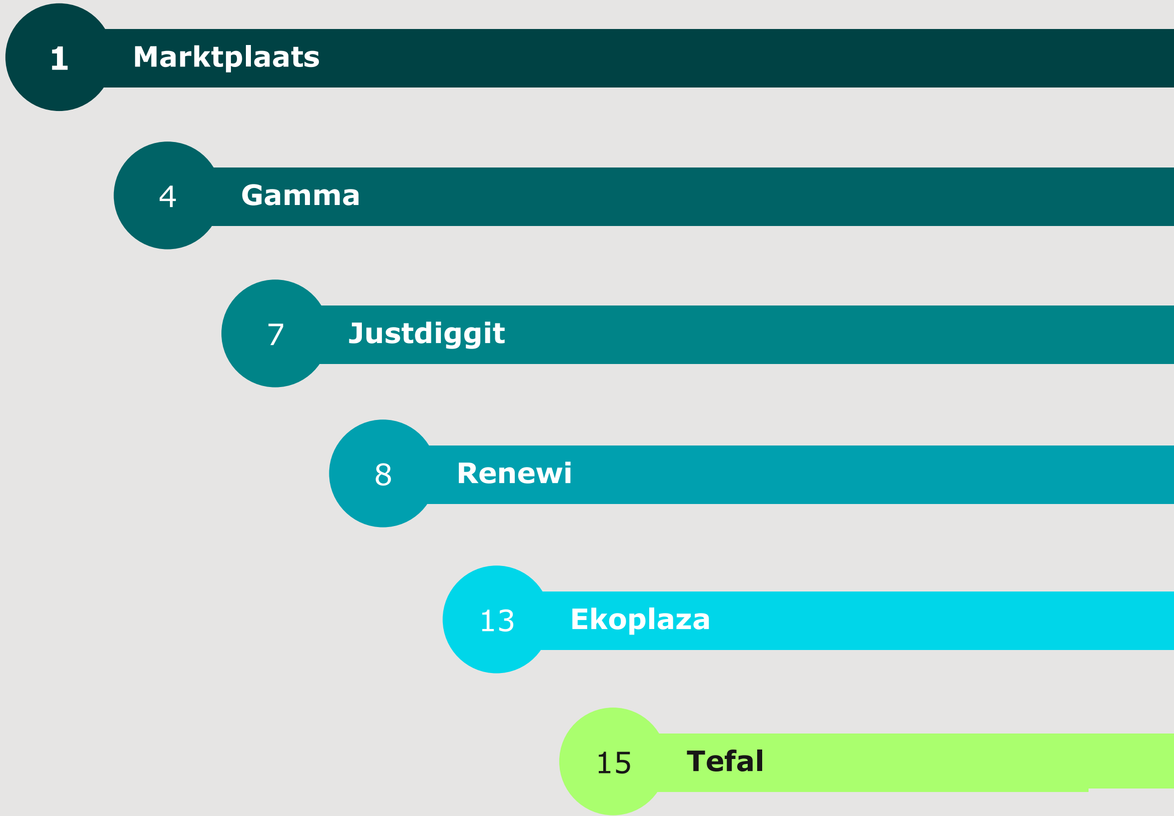
What we have observed in these conversations is that many organisations are still searching. Assumption would dictate brands that previously communicated publicly about sustainability and social themes to continue doing so. Nothing could be further from the truth. In some cases, a campaign appears to have been launched under pressure from a CSO, after which marketers would rather forget the commercial altogether. The sense of pride was absent.

Brands with beautifully produced commercials and strong NPS scores often choose not to follow up, because the business gave these campaigns less priority. There are also cases where the endresult disappointed or triggered socially undesirable reactions.

Our conclusion is that there is still considerable work to be done to secure a structural place for sustainability on the marketer’s agenda. According to some, not communicating about progress – also known as greenhushing – remains the safer option.

This does not apply to B Corps, NGOs and impact scale-ups. Communicating about impact is their bread and butter. However, there is a strong tendency among them to avoid being associated with commerce. Impact comes first, and there is also an expectation of inherent credibility. It is therefore disappointing that this credibility is not always experienced as such by mainstream consumers.

Here too, there remains significant room for improvement.



MARKTPLAATS.NL

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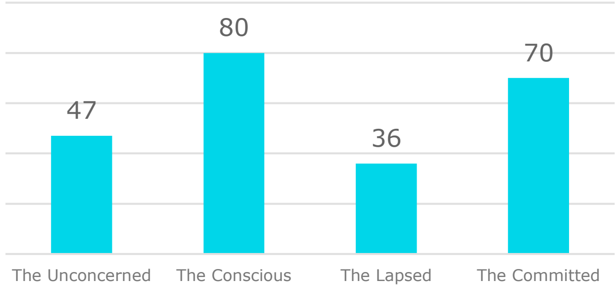
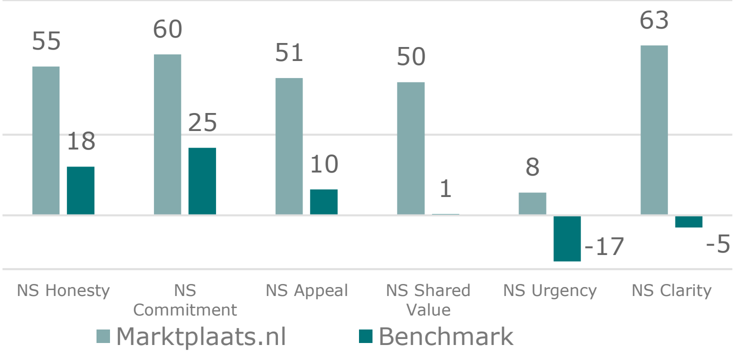
NCS

NCS PER SEGMENT

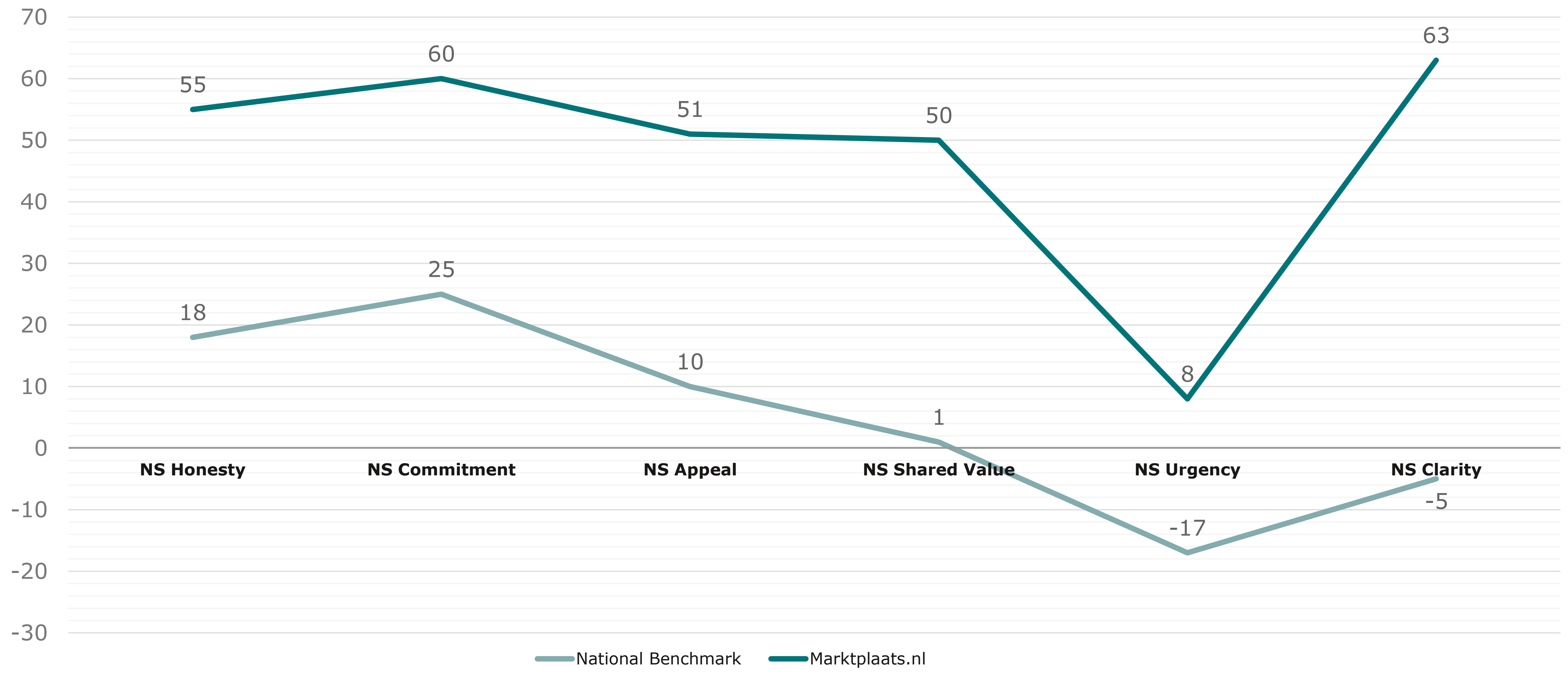


NCS PER DRIVER



Adevinta's "Toys" campaign, is the best-scoring campaign of the 200 campaigns tested. This is reflected in its scores on the different drivers, with the highest ratings on Honesty, Commitment, and Clarity, and high scores on Appeal and Shared Value. This campaign dramatically outperforms the benchmark. The NCS is highest **among** the Conscious, scoring 10 points higher than **among** the Committed.

MARKTPLAATS.NL CREATED AN IMPRESSIVE COMPETITIVE ADVANTAGE BEING HIGHLY CREDIBLE



WHAT STOOD OUT IN THE BENCHMARK

Key insights:

- In general, there is much room for improvement. After introduction 4 years ago, the Belgium NCS benchmark went up from 15% to 29%.
- Commercial brands occupy both the top and the bottom of the ranking. In line with the six drivers of sustainable impact, it appears that how these drivers are applied has a greater effect than large budgets, high frequency or the use of TV.
- NGOs perform relatively well on average. Even the lowest-scoring organisation in this group still achieves a net positive result of +8. The highest-performing foundation ranks at number 5.
- EU and government communication ranges from reasonably strong performance (position 43) to very weak performance (position 186). There is clearly work to be done when serious, informative advertising is not trusted by the very citizens it aims to reach.
- B Corps are regarded as frontrunners and role models. The top-performing B Corp ranks at number 33. Encouragingly, consumers generally endorse the claim of sustainable leadership. That said, there are B Corps that are perceived as more untrustworthy than trustworthy. The lowest ranking B Corp appears at number 194.
- What applies to B Corps also applies, to a greater or lesser extent, to impact start-ups and scale-ups. The highest-ranking organisation in this group is at number 26, while the lowest ranks at number 185.

Other valuable insights:

- B Corps generally score above average
- The top 10 consists of 3 not-for-profit organisations (NGOs) and 7 for-profit organisations
- The highest-ranking Out-of-Home execution appears at number 7 (+54)
- Positions 149 and 150 are classified as neutral (both FMCG)
- High-scoring TV commercials are occasionally adapted into poorly performing OOH executions, and vice versa

04

CONSUMER INSIGHTS

CONSUMER INSIGHTS

In addition to the NCS benchmark, we conducted in-depth consumer research among the same representative group of 6,000 Dutch respondents. This research was carried out prior to the benchmark measurements and provides essential context for interpreting the NCS results. Respondents were asked detailed questions about their attitudes towards sustainability and societal change, as well as their perceptions of sustainability-related communication.

The insights presented in the following sections address four key questions:

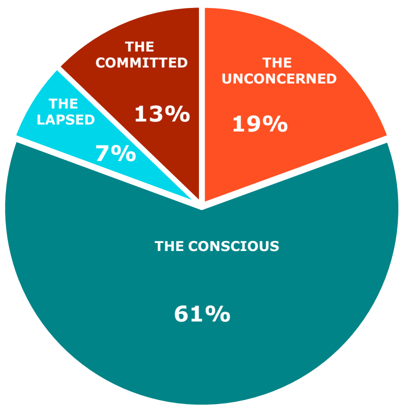
- how people view sustainability and social change,
- who they expect to lead this transition,
- what barriers they experience when trying to live more sustainably,
- and what role they believe companies and brands should play in supporting them.

Together, these insights help explain the broader mindset in which impact advertising operates — and why credibility is such a critical condition for effectiveness.

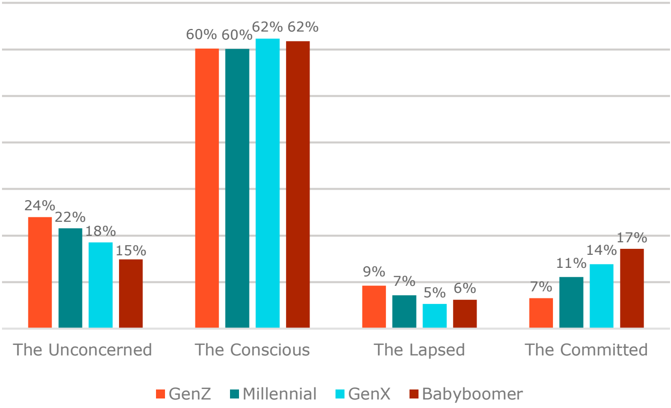
HOW DO PEOPLE VIEW SUSTAINABILITY AND SOCIAL CHANGE?

NEARLY 75% WANT TO MAKE AN EFFORT TO LIVE MORE SUSTAINABLY

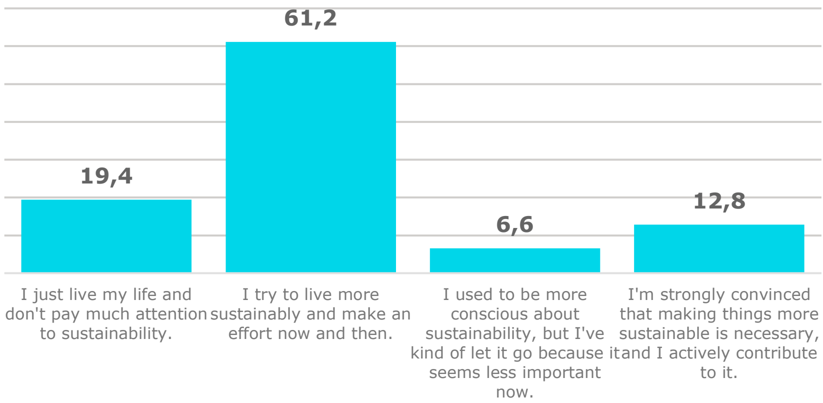
CONSUMER SEGMENTS (1)



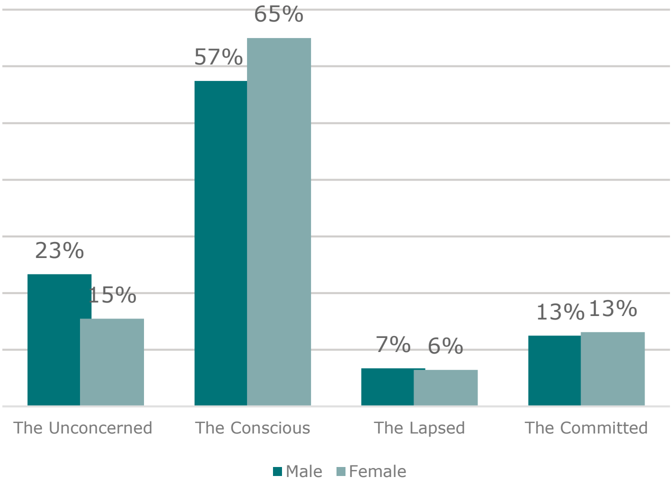
ATTITUDE X GENERATIONS (3)



WHICH OPTION BEST REFLECTS YOUR PERSONAL APPROACH TO SUSTAINABILTIY? (2)



ATTITUDE X GENDER (4)



KEY TAKE OUTS & ACTIONS

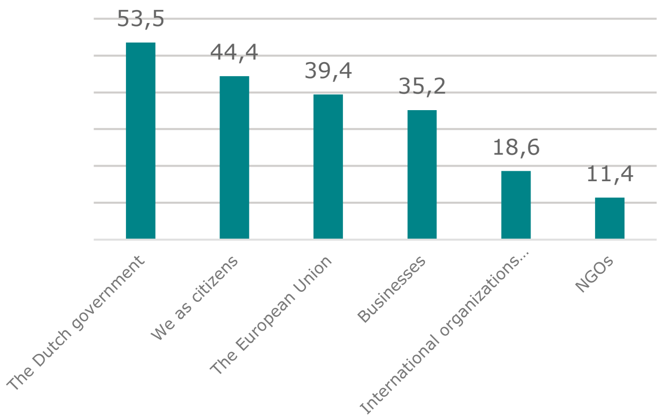
1. We identify four segments based on attitudes towards and approaches to sustainability. The largest group, **The Conscious** (61%), is open to living more sustainably. This group is essential for creating the 'norm shift' towards a sustainable society. To motivate them to take action, they need accessible, practical solutions — sustainability is not their primary driver. Therefore, start with the **concrete benefit for them**: is the product healthier, tastier, more enjoyable, more and does it contribute to a better world? (1,2)
2. Acknowledge **"sustainability fatigue"**. For the group that has disengaged (7%), it is important to demonstrate that the transition towards sustainability is continuing. Share positive stories about progress and tangible results to provide perspective and hope. (1,2)
3. Segment where relevant by **age**: younger people are more likely to be disengaged or indifferent, while older people tend to be more active. Also differentiate by **gender**: men are more often indifferent. There is clear potential to engage this group with a relevant narrative, representations and examples that align with what they value, and that show sustainability has much to offer them as well. (3,4)

WHAT ORGANISATIONS SHOULD LEAD THE SUSTAINABLE TRANSITION?

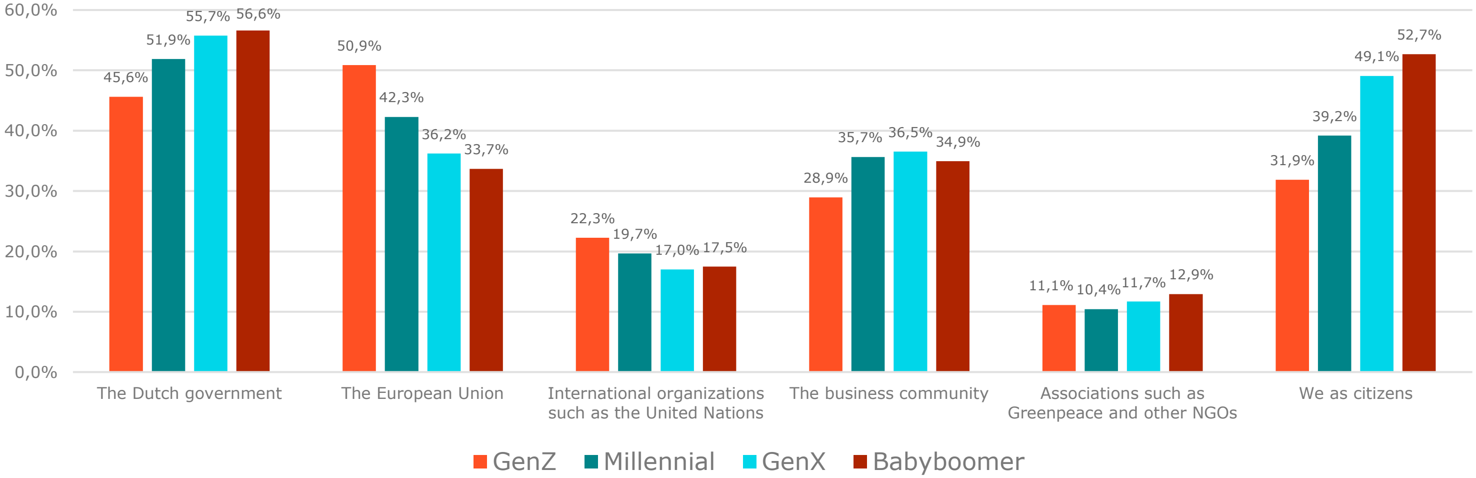
ALMOST 45% BELIEVE THE TRANSITION CAN BE LED BY CITIZENS

WHO SHOULD CHANGE? (5)

BEST POSITIONED TO LEAD THE TRANSITION (6)



BEST POSITIONED TO LEAD THE TRANSITION | GENERATIONS (7)



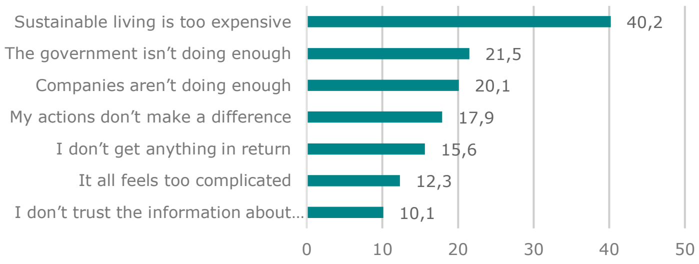
KEY TAKE OUTS & ACTIONS

1. While the majority (54%) place responsibility for sustainability primarily with the government, there is also a substantial group (45%) that recognises the power of individual action and citizens. This offers clear opportunities for activations and community building. Collaboration with the many existing citizen-led initiatives creates strong potential for value exchange. Companies and brands can play a facilitating role by supporting initiatives, increasing their visibility, and sharing knowledge and expertise to jointly accelerate the transition. (5,6)
2. Older people (over 50%) see a greater role for citizens than younger people (32%). Respond to these differences. Enable older generations to contribute collectively and ensure they have tools to share their actions, inspiring others in turn. For younger audiences, consider how initiatives can be positioned within a broader perspective — such as international scope or European-level collaboration. (7)
3. Companies should demonstrate what they are actively doing to make a positive contribution. Share transparent (open and honest) stories about concrete actions, innovations and partnerships. Show that there is more than a pure economic focus and involve engaged employees. NGOs can act as expert and knowledge partners; for them, collaboration with companies offers opportunities to increase visibility reaching new audiences towards more impact. (6,7)

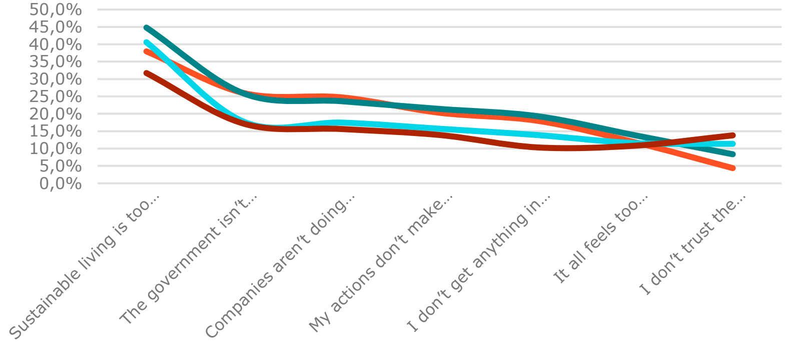
WHAT BARRIERS DO PEOPLE EXPERIENCE WHEN TRYING TO LIVE MORE SUSTAINABLY?

HIGH COST OF SUSTAINABLE LIVING REMAINS THE KEY BARRIER (40%)

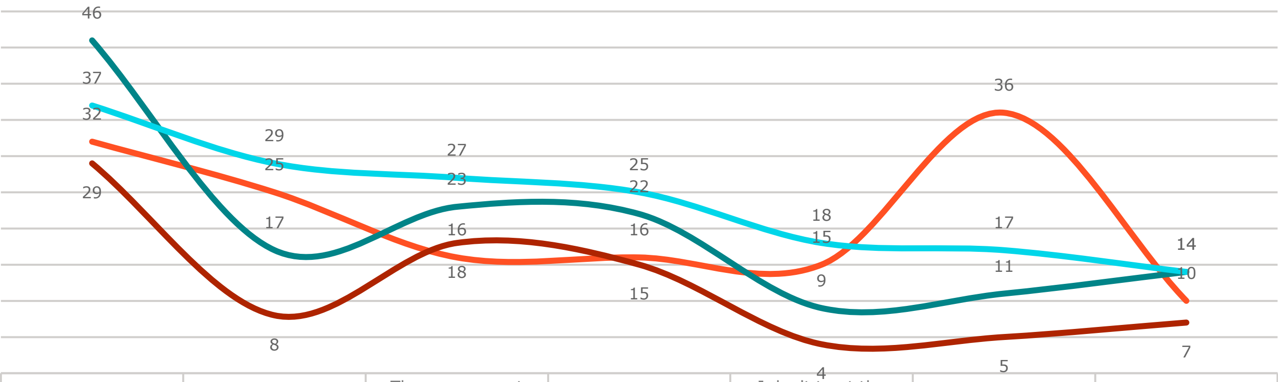
WHAT STOPS YOU FROM MAKING YOUR OWN BEHAVIOR MORE SUSTAINABLE? (8)



ALL BLOCKERS ALL GENERATIONS (9)



ALL BLOCKERS X SEGMENTS (10)



	Sustainable living is too expensive	My actions don't make a difference	The government isn't doing enough	Companies aren't doing enough	I don't trust the information about sustainability	I don't get anything in return	It all feels too complicated
The Unconcerned	32	25	16	16	15	36	10
The Conscious	46	17	23	22	9	11	14
The Lapsed	37	29	27	25	18	17	14
The Committed	29	8	18	15	4	5	7

The Unconcerned The Conscious The Lapsed The Committed

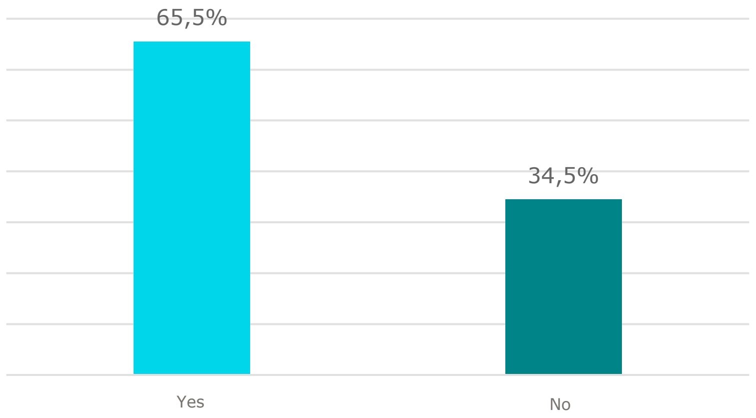
KEY TAKE OUTS & ACTIONS

1. High costs of sustainable offers prevent mainstream audience to change their behavior. Meaning that sustainability alone is not a driver for them. In line with the former conclusion the value perception of sustainable goods needs to change. What is the added value other than being better for the planet or society to be worth the extra investment? This needs to be very clear (9).
2. 20% says companies are not doing enough (effect of greenhushing?), esp the Lapsed and Conscious. In order to lead the transition the Conscious group is needed. An opportunity for front runners in sustainability to share their efforts in a credible and transparent way. Not like 'we have it all figured out' and traditional advertising way but in a humble, open communication. With room for interaction, longer formats, trustworthy channels, partnerships or co-creation and for the long run (10).
   Lack of trust does not seem to be a hurdle which is a positive sign.
3. Government (more details in appendix) needs to step up in their action or the effectiveness of communication around initiatives. Applying the factors of credibility can help (8,10)

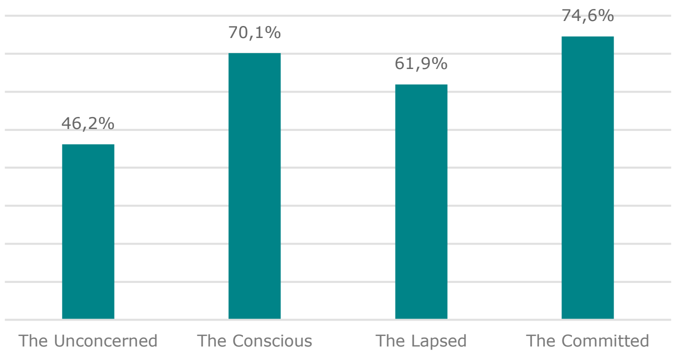
WHAT ROLE IS EXPECTED FROM BUSINESSES?

THE ROLE OF BRANDS AND THEIR COMMUNICATION

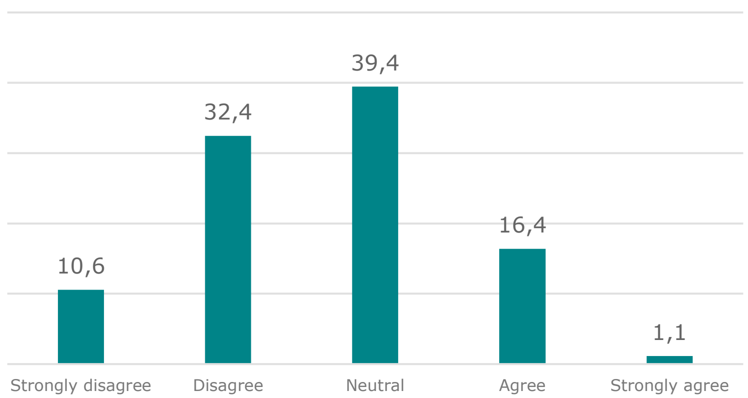
DO YOU EXPECT BRANDS TO HELP YOU BUY MORE SUSTAINABLY?



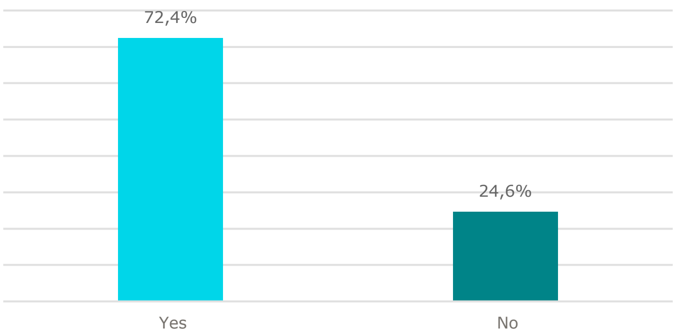
DO YOU EXPECT BRANDS TO HELP YOU TO BUY MORE SUSTAINABLY, PER GROUP?



DO YOU CONSIDER COMPANY COMMUNICATION CREDIBLE WHEN IT ADDRESSES SUSTAINABILITY? (%)



IF BRANDS EXPLAINED HOW BUYING THEIR PRODUCTS SUPPORTS SUSTAINABILITY, WOULD YOU BE MORE LIKELY TO CHOOSE THEM?



KEY TAKE OUTS & ACTIONS

1. A strong consensus: companies need to facilitate people in making more sustainable choices and communicate about the actions around sustainability. This a clear sign: Greenhushing is slowing the transition. Again a huge opportunity for businesses to step in.
2. Even half of the group that is unconcerned wants companies to help them with living a more sustainable life.
3. In general, company's communication around sustainability is not considered credible: only 17% agrees with the statement. Although 40% is neutral this offers much room for improvement on creating positive impact.

05

USING THE NCS EFFECTIVELY

USING THE NCS EFFECTIVELY

Because the NCS has just been released, many high-scoring campaigns were created without consciously applying the model. In hindsight, these campaigns intuitively did the right things. The real challenge now is to understand why they worked. Moving from unconscious competence to conscious competence is a crucial next step for the industry.

By making these intuitive choices explicit, marketers gain the ability to apply them more deliberately and consistently. We hope this framework encourages marketers to reflect on their experiences and to share their learnings, so that collective knowledge can accelerate the effectiveness and credibility of impact advertising.

Ultimately, the goal is for marketers, communication professionals, and the creative industry working alongside them to adopt the NCS at scale, enabling the collection of cases and knowledge that can then be shared with every impact maker.

Returning to the purpose of this chapter: as mentioned earlier, the NCS provides a proven method for steering the credibility of impact communication. An NCS score indicates the overall effectiveness, while an NCS scorecard provides deeper insight. This comprehensive (paid) report offers specific explanations and improvement opportunities relating to the six credibility drivers for your advertisement.

Below, we outline how to get started with the NCS in the most effective way.

Begin with a baseline measurement to determine the current credibility of your impact campaign. This will not only give you the overall score but also the individual scores for the six credibility drivers. It is considered a baseline measurement if this is your organisation’s first NCS scorecard (an in-depth report on the (rel.) credibility of your campaign)

Ideally, this is done through a post-analysis of your most recent sustainability execution. If you are fortunate, your campaign may already have been included in the 200 executions tested in our NCS benchmark. In that case, the results are immediately available, and no new research panel needs to be recruited. Check with your creative or media agency, dentsu, or Bubka to see whether your campaign was included in the benchmark.

- Consumer durables
- Non-profit & public sector
- Housing & construction
- Retail
- Energy
- Banking & insurance
- Telecom & media
- Food & beverages
- Household & personal products
- Automotive & mobility

NCS IN CREATIVE WORK

Future campaigns can also be tested on the NCS before production and distribution. The advantage is that this will likely help you use your budget much more effectively. Such a test focuses on evaluating the storyline, narrative, and creative concept materials for the campaign under development.

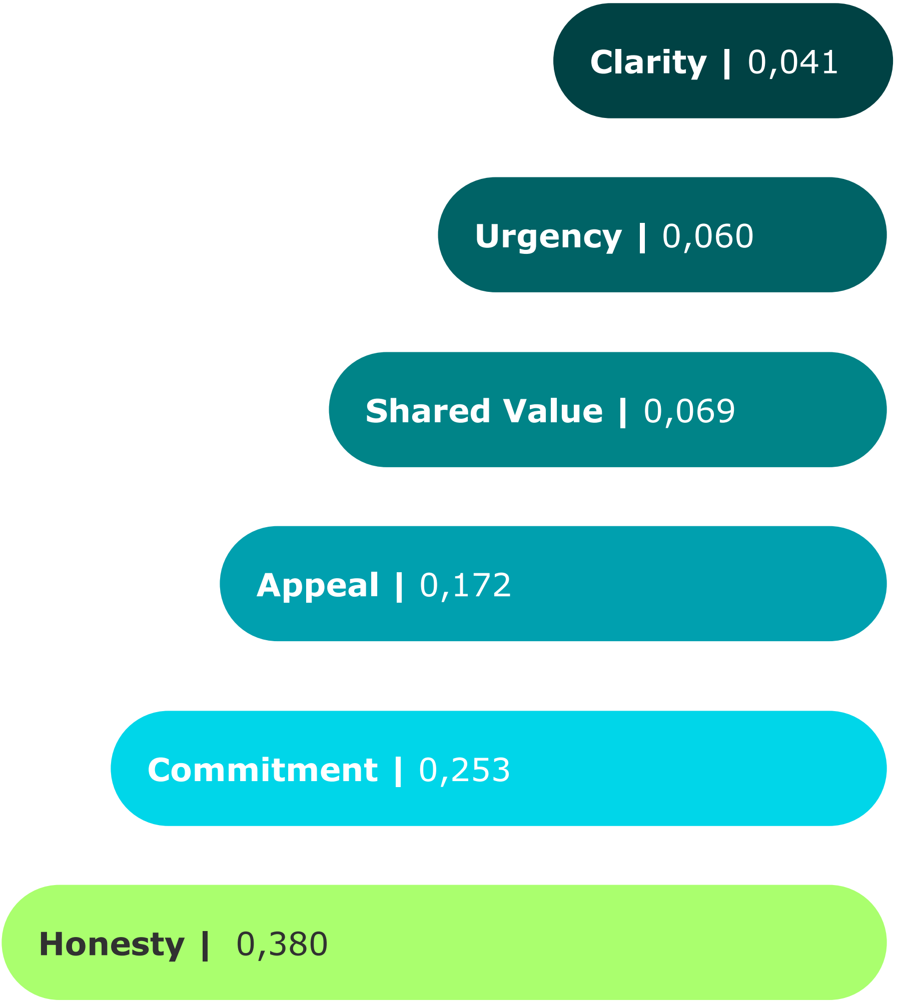
A new lens

A standard creative and/or media briefing does not provide enough information to optimise the credibility of your campaign. To do this effectively, you need insights into the scores of the six credibility drivers and how they interrelate. In addition, you must carefully consider how each driver can be substantiated with evidence.

The NCS model therefore provides a new lens through which to develop and review creative work. It requires deeper analysis, more data and stronger proof to achieve meaningful optimisation. It may also mean consulting with other organisations to better substantiate your claims. This will take some practice, but it is likely to pay off.

How does the NCS relate to anti-greenwashing guidelines? The simple answer: The NCS incorporates the ACM’s [five rules of thumb.]

The six determinants of impact communication credibility and their weights



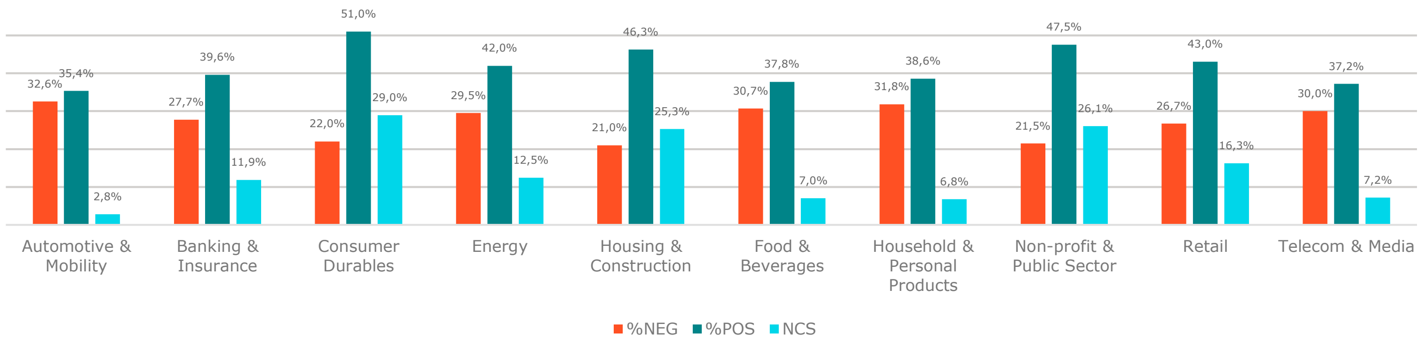
DRIVERS ACROSS INDUSTRIES

This relates to the relative importance of the drivers. Not every industry scores equally well on every aspect, and the importance of the six drivers varies per category — as shown to the right. It is important to discuss these insights, and the reasons behind them, with the integrated campaign team.

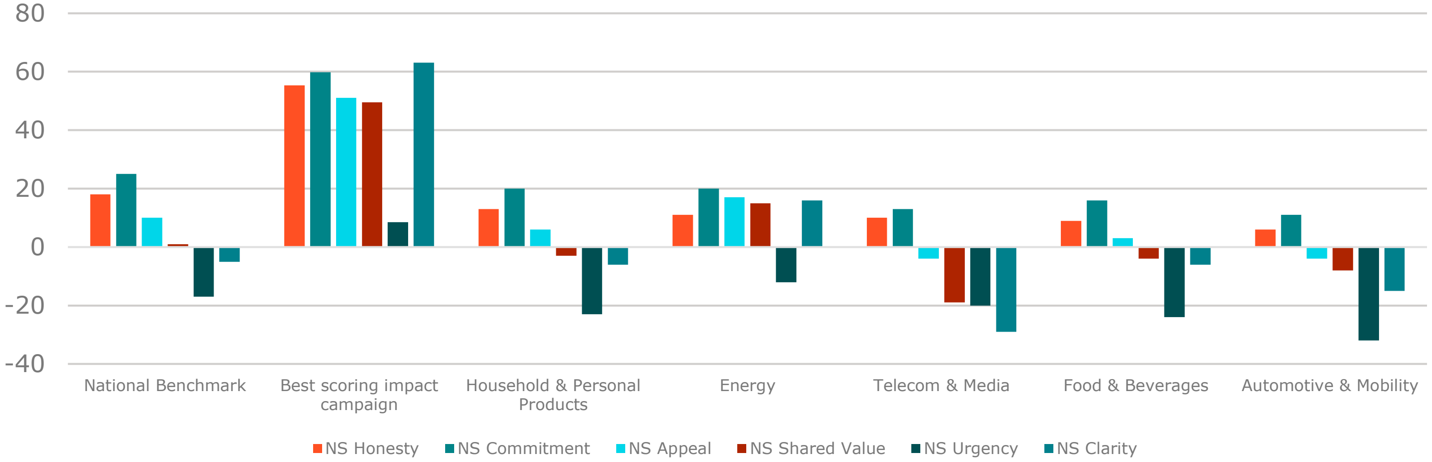
These insights are a first and give us a new context which wasn’t possible before. Good performing organizations and brand are currently unconsciously competent. Especially on the individual drivers the differences per category are large. These insights and additional context helps to become consciously competent.

Once you have formulated your insights in a briefing, the most effective approach is to brief creative and media teams together. In addition, for impact campaigns it is even more important to align creative work with channel selection — not every channel has the same communication power, usage moment or available formats.

THE NCS PER INDUSTRY
(% POSITIVE OR NEGATIVE AND RESULTING NCS)



SCORING NCS DRIVERS FOR DIFFERENT INDUSTRIES



THE SIX DRIVERS EXPLAINED

What do the six drivers mean — and how do you optimise them?

Because products and industries differ, there is no one-size-fits-all answer. Think of it as a creative challenge. Below, we provide general guidelines for each driver that marketers, communication specialists and creative teams can apply.

Honesty

Is the message transparent, realistic, and supported by evidence?

Be transparent and factual. For every brand — especially those in transition — sustainability efforts are snapshots in time and may involve uncertainties. Keep the message realistic. Substantiate every claim; this prevents scepticism and shows that nothing is being hidden.

Do not exaggerate. Promise only what you can deliver — or better yet, only what has already been achieved.

Be transparent about your approach. Openness about measurement methods and challenges increases credibility. Also consult the ACM's anti-greenwashing guidelines; experts have published widely on this, so plenty of valuable information is available.

Commitment

Does the brand demonstrate that it is genuinely dedicated to the stated goal — and how does the audience feel this?

Commitment scores the highest across all industries. We tend to respond positively to organizations that visibly put their heart and soul into their efforts.

Emotional resonance matters, but enthusiasm must be legitimate. A certain level of consistency over time is also important.

Walk the walk, not just talk. If your organisation is in the early stages of transition, wait until the first tangible results are there. Clearly demonstrate how you are involved in the issue. If the connection feels accidental, the audience will not see the logic — and without that logic, credibility suffers. Make clear that this is not a one-off marketing campaign.

Avoid greenhushing. Dare to highlight your positive contribution and articulate its meaning (without bragging). This helps people feel that the brand genuinely cares about the goal.

THE SIX DRIVERS EXPLAINED

Shared Value

Does the message align with what people themselves consider important?

As an impact maker, you may have an excellent sustainable solution — but if the wider population does not value the same things, it becomes difficult to grow. To reach a tipping point, you need scale. This means translating your sustainable solution into a shared consumer value.

Know what drives your audience. Conduct research or use existing insights about your target groups, and connect your message to their values and interests. A useful tool is the *Elements of Value framework* described by Harvard Business Review in 2016 (subscription required, but the pyramid and explanations can also be found elsewhere).

Frame sustainability in universal values. Present your objective in a way no one can disagree with. For example, instead of positioning a green-energy campaign purely around carbon reduction, frame it as *"clean air in your neighbourhood"* — something everyone cares about.

Speak the audience's language. Adapt your tone-of-voice and examples to their everyday world. Use relatable situations, places, or metaphors that reflect their lived reality. Jens van Weele's work on "transition language" offers excellent practical guidance for this.

Appeal

Is it clear what the added value is for the audience? Does the message resonate on an emotional, functional or social level?

Make the message attractive and relevant to the audience. What appeals most strongly depends on the target group. For example, the large "Conscious" group (61%) has a heightened price sensitivity when it comes to sustainable products and services.

Emphasise the benefit for the audience. Communicate what the message offers them emotionally, functionally, or socially. For instance, instead of saying *"You should save energy,"* say *"Would you like to lower your energy bill?"* — framing the goal as personally relevant and appealing.

Use storytelling and emotion. Ensure the core message resonates. Tell a short, human-centered story that illustrates the impact.

Visuals and tone. Support the appeal with appropriate imagery and tone-of-voice. Keep the tone positive and inspiring.

THE SIX DRIVERS EXPLAINED

Urgency

Make it clear why action is needed now — and always offer a sense of agency.

Explain why immediate action is necessary, but ensure the audience also understands what they can do. Urgency is a sensitive topic: for the critical mass, it can trigger resistance. How strongly urgency is felt depends on the industry and on how relevant the topic is to the target audience. For NGOs, urgency is often easier to incorporate into their communication strategy than it is for mainstream consumer brands.

Create a sense of urgency without causing paralysis.
Communicate why action is urgent — e.g. "Climate change won't wait" or "Every day, 100 new patients are added" — but avoid leaving the audience feeling powerless.

Provide a concrete call to action.
Pair urgency with a clear next step for the receiver. Pessimism is contagious, but so is optimism. Ensure your urgency message is accompanied by a hopeful invitation to contribute immediately.

Emphasise the momentum.
If there is a relevant current event or deadline, use it. A clear time factor strengthens urgency — but make sure the deadline motivates rather than discourages.

Clarity

Keep the message clear, concrete and easy to understand.

Although Clarity is a relatively small factor, it cannot be overstated: for every NCS driver, simplicity is more effective than adding detail or complexity. More information can easily become counterproductive.

Avoid jargon, vague terms and use simple language.
Use clear language that anyone — your grandmother, your neighbour — would immediately understand (check B1). Buzzwords like "circular ecosystem" or generic phrases like "sustainable product" communicate very little.

Keep the message concise and to the point.
Focus on a single core message per execution.

Check for comprehension.
Test your concept with someone outside the project (a colleague or acquaintance). A clear message not only improves understanding, but also strengthens credibility — people trust communication more when it is straightforward and honest.

WHAT’S NEXT?

If you have taken our insights into account and developed your first campaign, the question then becomes: What’s next?

As with any campaign, it is advisable to conduct an evaluation. A post-NCS analysis is ideal for this. By mapping credibility, and combining these findings with brand consideration and sales results, you can determine the overall contribution of your efforts. In this way, data and insights are transformed into knowledge — and ultimately into both sustainable and financial impact.

Tip: Because the NCS is new for every stakeholder in the chain, we recommend evaluating the process and execution together with all involved partners. This strengthens collaboration and leads to better outcomes in the future.

Ultimately, the evaluation should answer two key questions:

- What is the impact of the current campaign materials?
- Where should the focus lie to structurally achieve greater sustainable and financial impact?

Keep evaluating at a rhythm that fits your organisation.

06

IN CONCLUSION

CONCLUSION

Sustainability communication operates in a fundamentally different reality than it did a decade ago. Expectations are higher, and people are more critical than ever. In this context, good intentions and polished storytelling are no longer enough. Impact communication must earn credibility — and it must be able to prove it.

What this means

Our research is clear: credibility is a decisive driver of effectiveness. It explains both consumer motivation and brand consideration, making it a measurable source of real value rather than a soft principle. The Dutch benchmark shows that many campaigns still fall short — but also that high credibility is achievable across sectors, formats and budgets when the right choices are made.

The six drivers of credibility provide practical guidance for doing so. They demonstrate that effective impact communication requires clarity, relevance, honesty and commitment over time.

Above all, they show that the large majority of people are willing to take steps towards a more sustainable and social future — if they are supported with credible, realistic and meaningful communication.

The Net Credibility Score offers a shared framework to learn, compare and improve. Used consistently, it enables marketers (unregard less where they work) to move beyond intention and towards lasting impact, turning credibility into a strategic advantage for brands, people and society alike.

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Bubka (B Corp) – *Certified Creative agency*	https://www.bcorporation.net/en-us/find-a-b-corp/company/b-u-b-k-a/
Universiteit Gent (UGent) – *Communication science*	https://www.ugent.be/ps/communicatiewetenschappen/cepec/en/team/gino-verleye
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Klinkende raak - *Accessible language usage -*	https://klinkendetaal.nl/

READY FOR IMPACT!?

Hopefully, you are inspired by our whitepaper

To achieve sustainable goals, technological innovation alone is not enough — gradual social and cultural change is equally essential. Impact advertising plays a crucial role in making this change visible, credible and actionable at scale. If you are already working on impact communication, this is your encouragement to continue: your efforts contribute to shaping new norms, even when progress feels incremental.

And if you have not yet engaged with impact advertising, now is the moment to begin. What people want or are able to contribute is not for brands or marketers to decide unilaterally; it requires understanding, empathy and credible guidance.

Fortunately, there is a growing body of knowledge to draw from. Platforms such as Duurzaam Ondernemen offer curated overviews of relevant literature, while Change Inc. has compiled a selection of recommended books that explore social change, sustainable behaviour and leadership.

For those who prefer visual learning, SDG Nederland's introductory video provides a clear and accessible explanation of the broader sustainability landscape. Together, these resources underline a simple truth: impact advertising is not about having all the answers, but about taking responsibility, staying curious and using communication to help people move — step by step — towards a more sustainable and social future.

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As such in his role of Strategy Director he advices large local and international organisations on their marketing strategies.

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Award-winning strategist, author and partner at Bubka.

A recognized authority on embedding credible sustainability into core business strategies, Wim believes that as the sustainable transition accelerates, credibility itself becomes a strategic asset. His research with Ghent University shows that corporate credibility directly shapes a company’s reputation, narrative relevance, communication effectiveness, and stakeholder engagement.

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Social Impact & Sustainability Manager at dentsu Benelux.

He operates strategically across the communication and media value chain, helping clients and the industry turn sustainability ambition into credible, scalable impact.

He is also the initiator of several industry-wide sustainability initiatives, designed to enable marketers to create more meaningful and lasting positive impact.

80 years ago,

communicators understood that to change behaviour, “dramatizing the benefit was the script.”

That script shaped an era.

But eras end.

Today, dramatizing the benefit no longer builds trust.
It erodes it.

Today, credibility is the currency of impact.

You’ve read the new script.

Take it.
Make it your own.
Build with it.

The world is waiting for communicators brave enough to go first.

If you are one of them, this script is yours.

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"Sustainability requires a fundamental shift. It is evaluated on long-term behavior and credibility, rather than short-term messaging or stated preferences. This shift makes communication more complex; it must be consistent, evidence-based and grounded in genuine trust. This is where NCS adds value, by providing the scientific insight organisations need to communicate sustainability in a credible, transparent and governable way."

Irma Bollen

Bestuurslid – Platform Innovatie in Marketing

"bvA champions responsible and effective marketing. The NCS provides marketers with a highly relevant KPI to measure and enhance the credibility and impact of their campaigns"

Henriette van Swinderen

Directeur bvA

"VIA is dedicated to fostering widely supported initiatives that help shape a sustainable future for our industry. The NCS makes it possible to jointly enhance the impact and transparency of campaigns."

Saskia Baneke

Directeur VIA Nederland

07

APPENDIX
CONSUMER RESEARCH DATA

MAPPING THE CONSUMER MINDSET

FOUR DIFFERENT PERSONAL APPROACHES TO SUSTAINABILITY

The large "middle group" dominate

- 61.2% say they "try to live more sustainably and make an effort now and then."
- This suggests most people are willing but not fully committed; they take small steps but don't make sustainability a core driver of their lifestyle.

One in five is disengaged

- 19.4% "don't pay much attention to sustainability."
- This group is significant: nearly 1 in 5 either don't care, are skeptical, or see sustainability as irrelevant to their daily life.

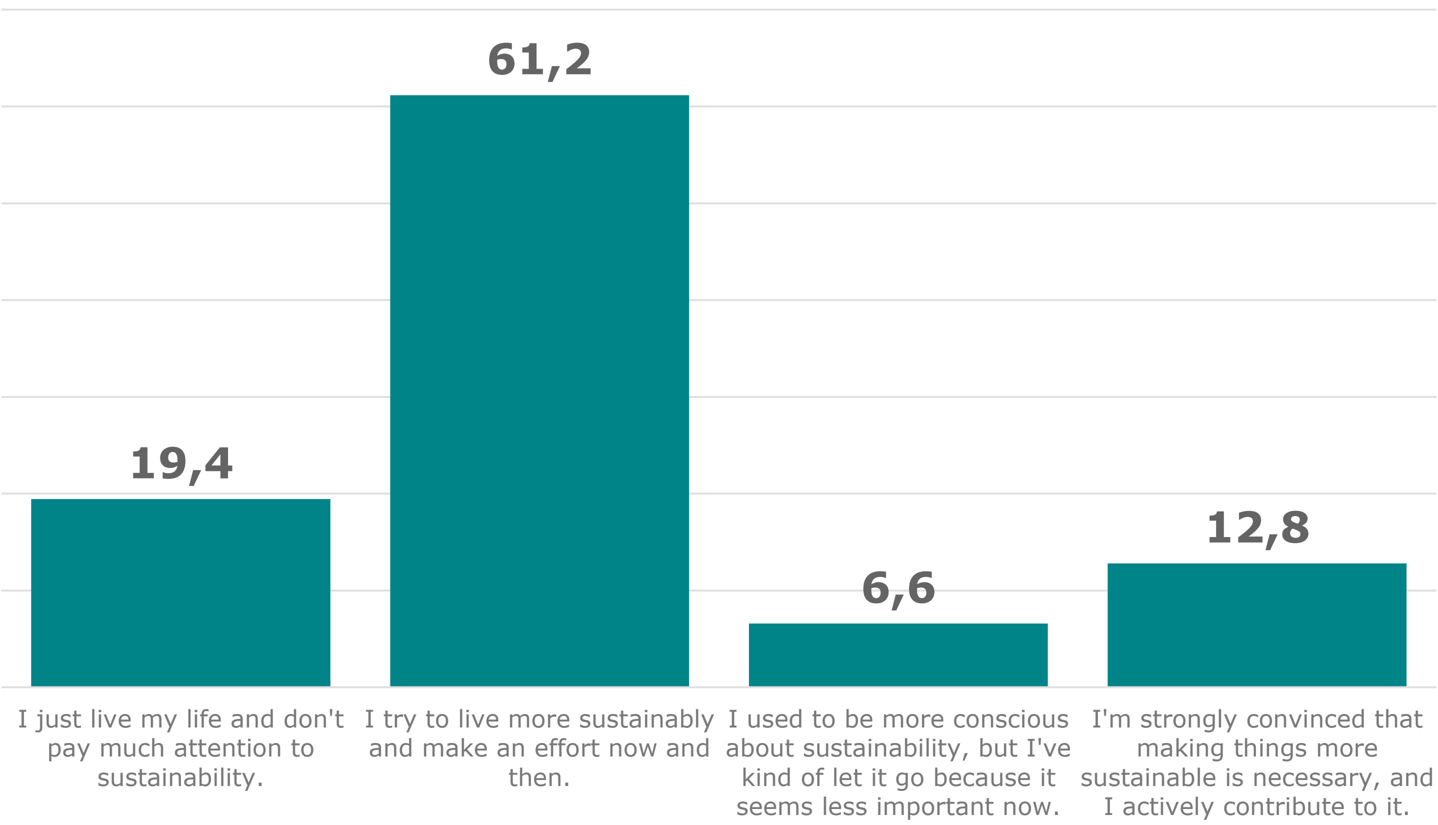
Only a small minority are strongly committed

- Just 12.8% are "strongly convinced" and actively contribute.
- This is the activist or "leader" segment which is important for setting trends, but clearly still a minority.

There's a small but notable drop-off group

- 6.6% used to be more conscious but have "let it go."
- This group is interesting because it signals *sustainability fatigue*: people who once cared but no longer see the urgency or relevance.

WHICH OPTION BEST REFLECTS YOUR PERSONAL APPROACH TO SUSTAINABILTIY %, N=6000



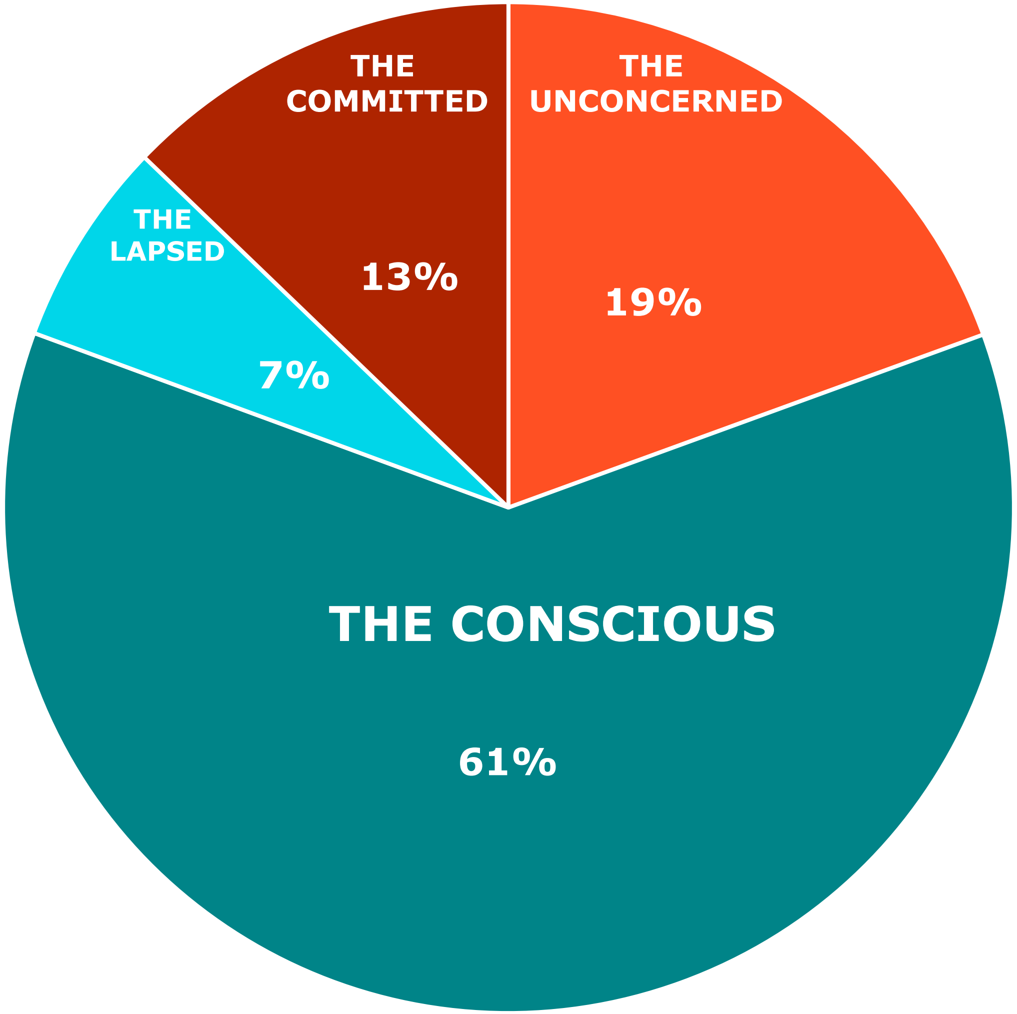
FOUR CONSUMER SEGMENTS TO TAKE INTO ACCOUNT

THE UNCONCERNED
I just live my life and don't pay much attention to sustainability.

THE CONSCIOUS
I try to live more sustainably and make an effort now and then.

THE COMMITTED
I'm strongly convinced that making things more sustainable is necessary, and I actively contribute to it.

THE LAPSED
I used to be more conscious about sustainability, but I've kind of let it go because it seems less important now.

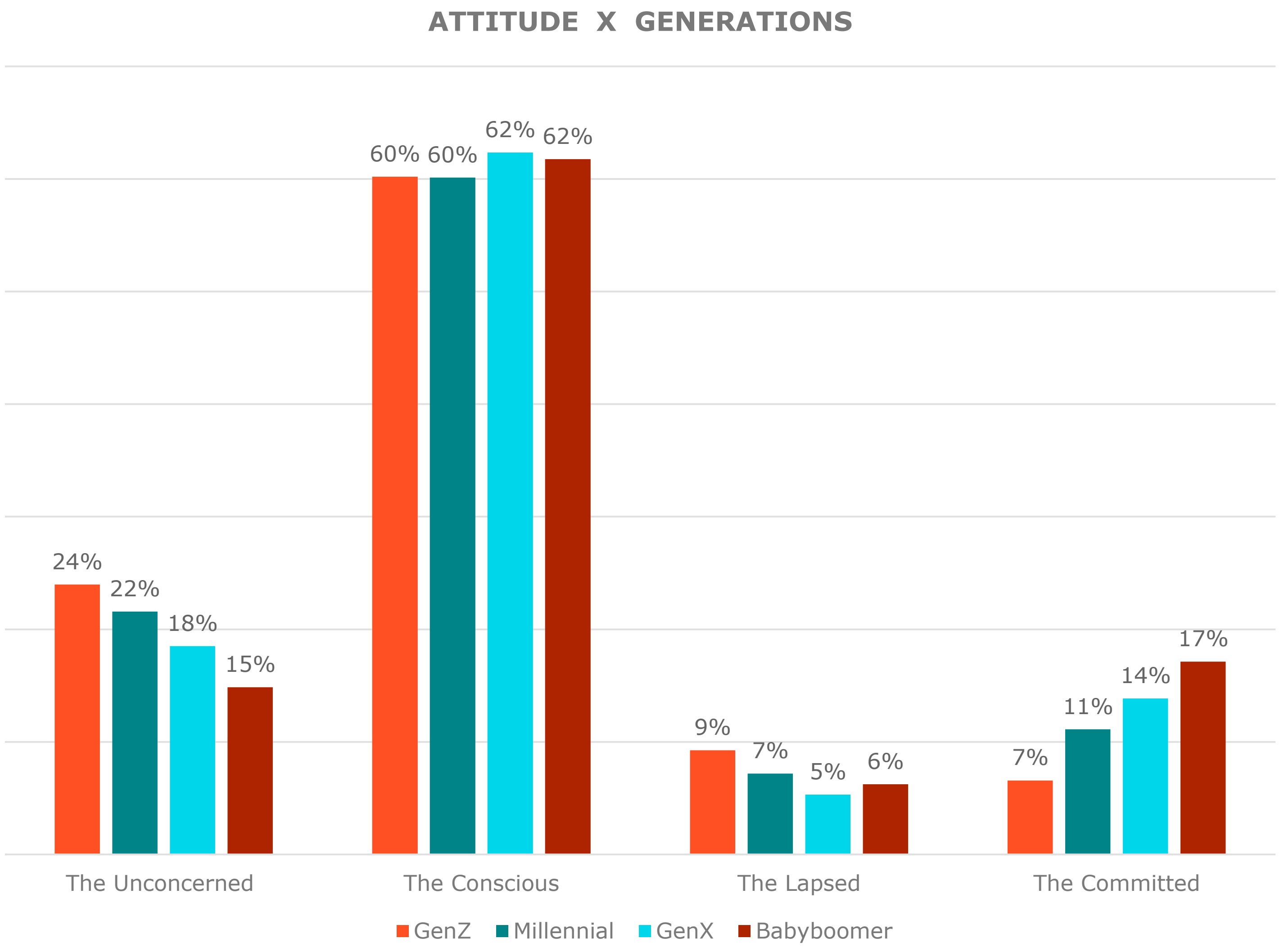


GEN Z IS LESS CONCERNED THAN OTHER GENERATIONS

The Conscious Majority
Across all generations, the largest group is "The Conscious," consistently making up around 60% within each segment. This shows that most people are aware of and make some effort toward sustainability.

Age and Commitment:
There's a clear trend where a strong commitment to sustainability increases with age. Baby Boomers are the most 'Committed' (17.1%), while Gen Z has the highest percentage of 'Unconcerned' individuals (24.0%).

The Lapsed Generation:
The "Lapsed" segment is highest among Gen Z (9.3%), suggesting a higher rate of younger people who may have stopped their sustainable efforts.



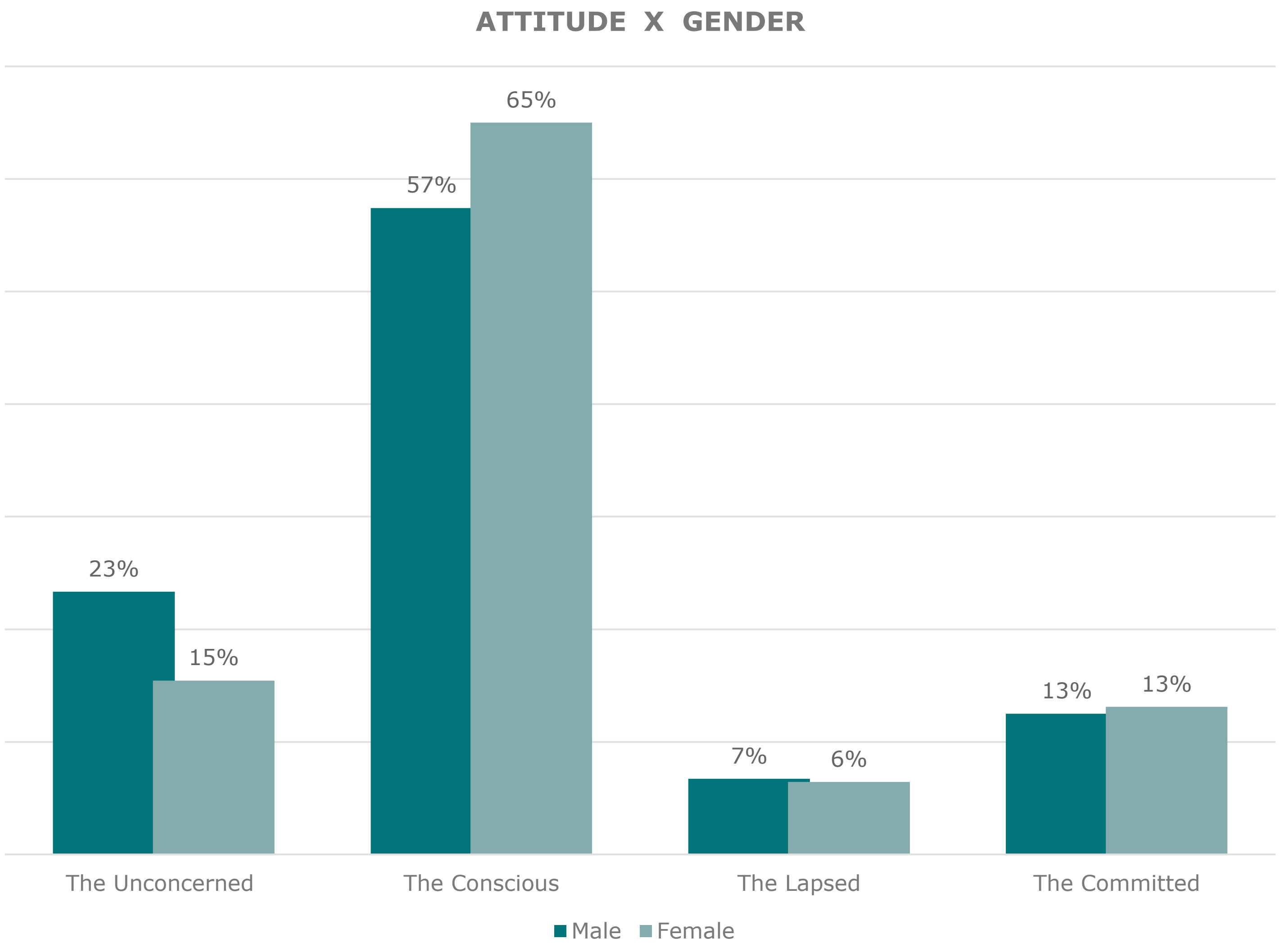
MEN ARE MORE UNCONCERNED AND LESS CONSCIOUS THAN WOMEN.

Women are more Conscious than men
- 65% of women fall into *The Conscious* cluster compared to 57% of men.
- This is a significant difference: women are more likely to integrate sustainability into their everyday decisions, even if not fully committed.

Men are more often Unconcerned
- 23% of men are *Unconcerned* vs. only 15% of women.
- That's a clear gender gap: men are roughly 50% more likely than women to disregard sustainability altogether.

Equal commitment at the high end
- Both men and women are equally represented in *The Committed* cluster (13% each).
- This suggests that once people cross into strong conviction, gender no longer plays a role — the difference lies in getting there.

Very little gender difference in Lapsed
- 7% of men vs. 6% of women are *The Lapsed*.
- This segment is small and fairly balanced, indicating that sustainability "fatigue" is not strongly gendered.



INCOME IS A DRIVER OF ENGAGEMENT

Income influences disengagement

Among *The Unconcerned*, **30%** have insufficient income, compared to only ~21% with sufficient and ~16% with more than sufficient income.

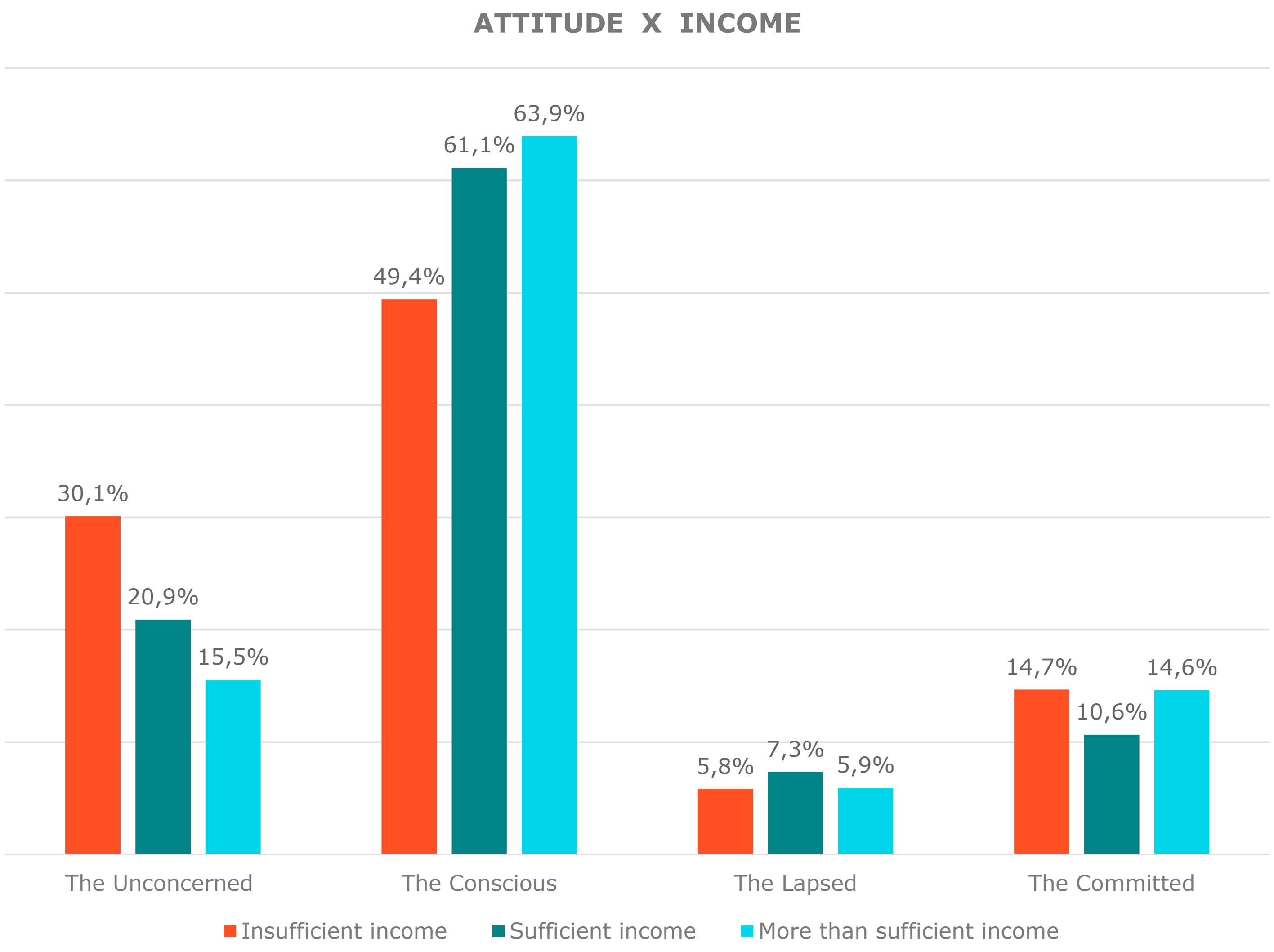
This suggests that people struggling financially are more likely to deprioritize sustainability.

Consciousness is high across all income levels

The Conscious is the largest cluster in every income group, but increases with income:

- 49% of those with insufficient income
- 61% of those with sufficient income
- 65% of those with more than sufficient income

So while sustainability resonates broadly, higher income clearly strengthens people’s ability or willingness to live more sustainably.



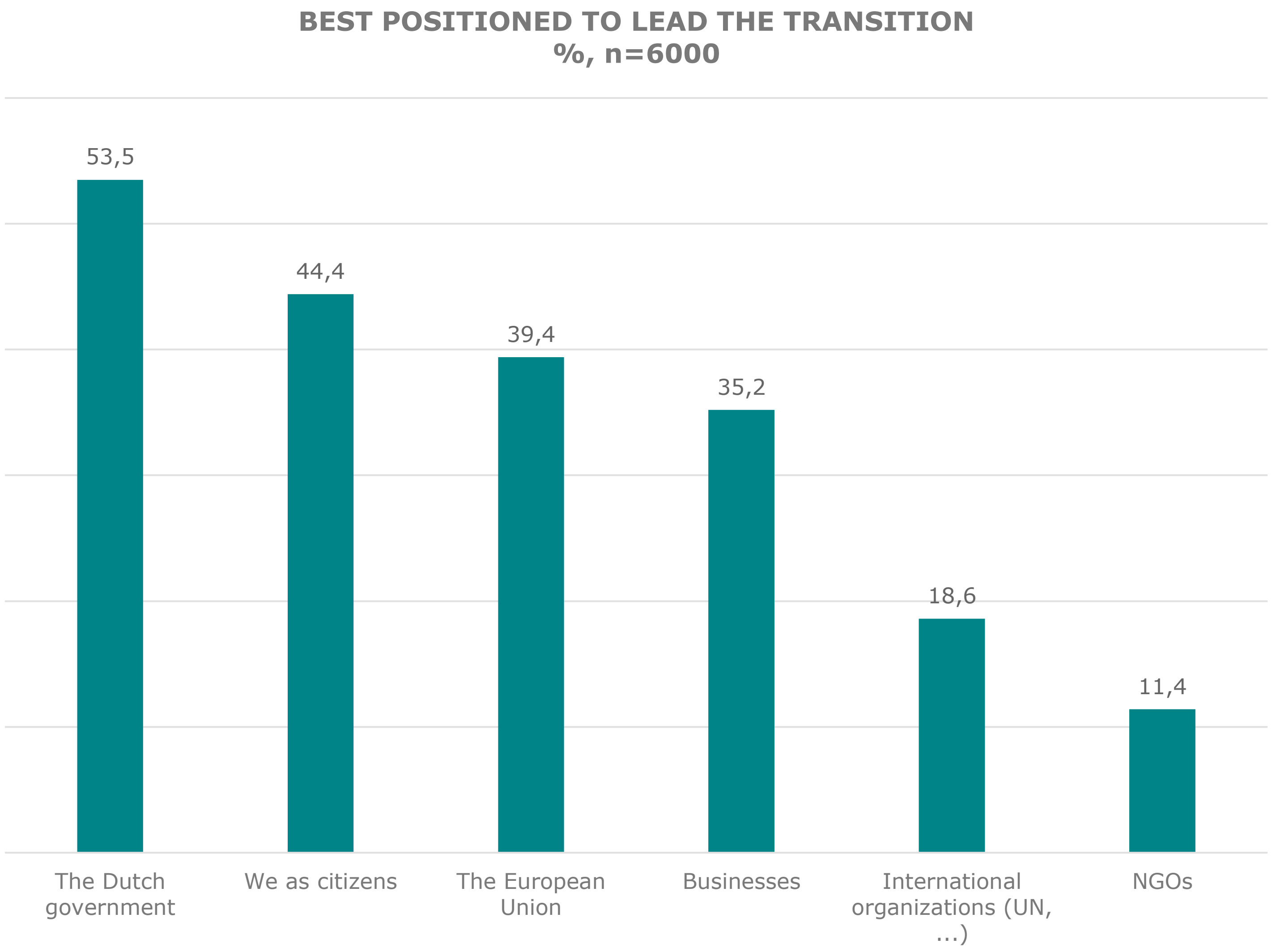
ALL EYES ON POLITICIANS, CITIZENS AND BUSINESSES

Strong trust in national government
A clear majority (53.5%) believe the Dutch government should lead. This shows people expect top-down regulation, policy, and enforcement, rather than relying on voluntary efforts.

Citizens see a role for themselves
44.4% say "we as citizens" are best positioned.
This is remarkably high: nearly half of people recognize personal responsibility in the transition.

EU and business also considered important
The European Union (39.4%) and businesses (35.2%) are still considered important, but less so than government and citizens.

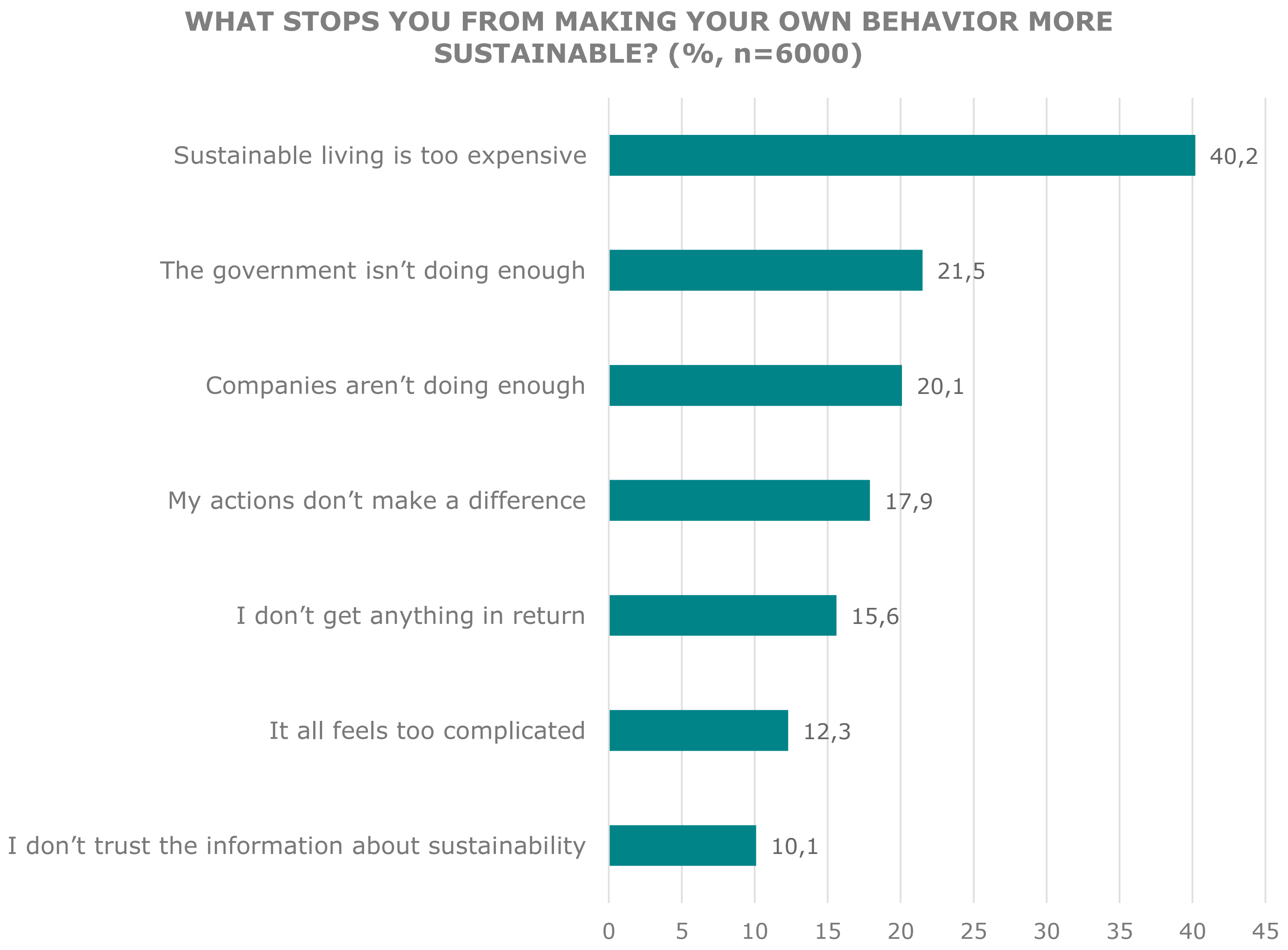
Weak belief in international organisations and NGOs
International organisations (18.6%) and NGOs (11.4%) are seen as having limited power to lead. This reflects skepticism about their ability to enforce or implement real change.



DIAGNOSING THE BARRIERS TO ACTION.

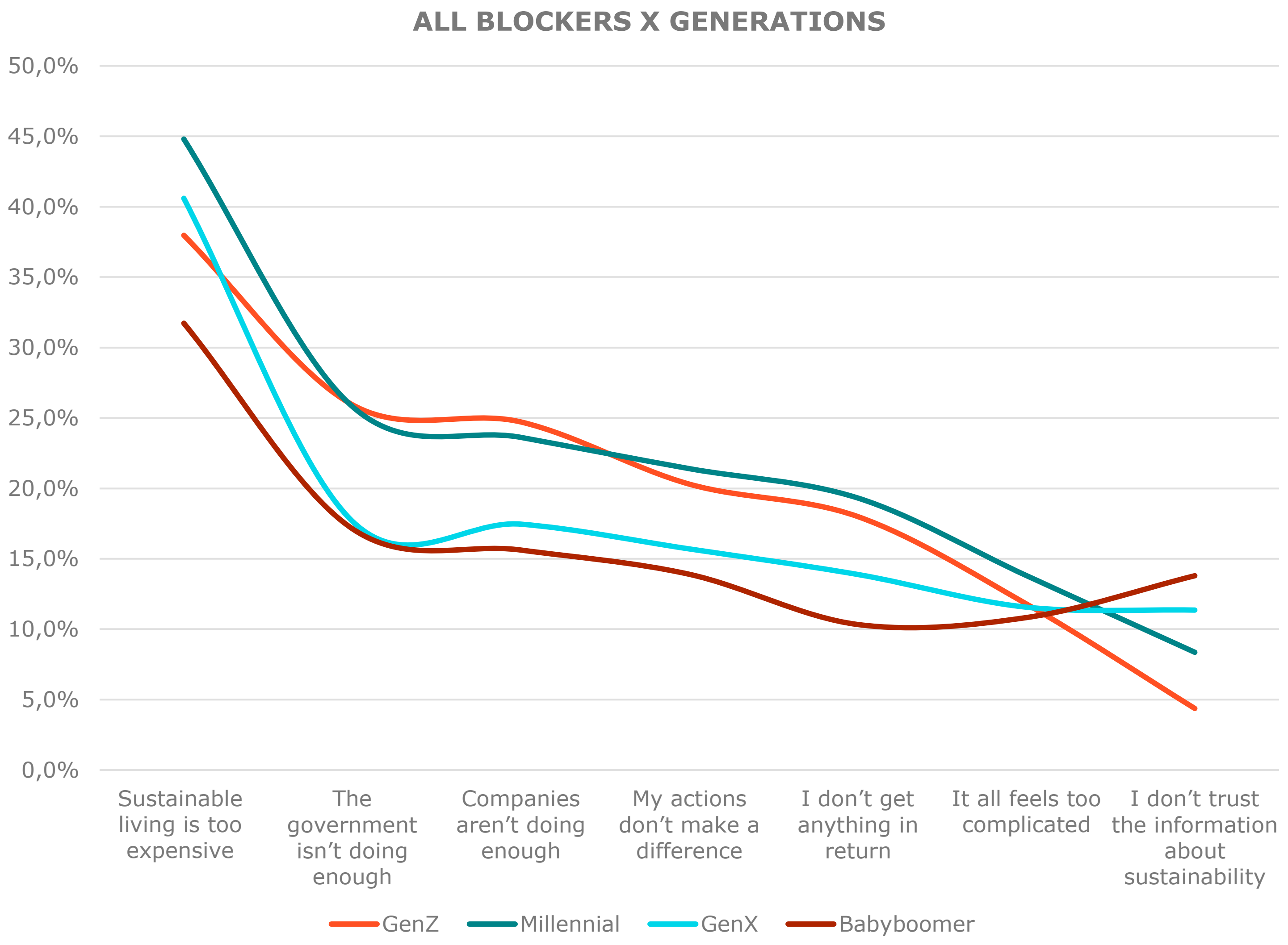
BARRIERS FOR CITIZENS

- The biggest blocker is **economic** (too expensive).
- The next strongest blockers are **systemic** (government and companies not doing enough), which points to the negative effect of **greenhushing.**
- Then come a number of **psychological barriers** (no impact, lack of reward, lack of know-how).
- Finally, **trust in information is only a blocker** for a small segment of people. This suggests that we may be **overstating** the threat of **greenwashing**.



BARRIERS ARE MORE IMPORTANT FOR YOUNGER GENERATIONS

- **Cost dominates**
  "Sustainable living is too expensive" is by far the biggest blocker across all generations, especially for Gen Z and Millennials where it peaks above 40 percent.
- **Systemic actors are blamed**
  "The government isn't doing enough" and "Companies aren't doing enough" come next, showing that people shift responsibility upward rather than inward.
- **Personal discouragement is secondary**
  Barriers like "My actions don't make a difference" and "I don't get anything in return" are noticeable, but clearly lower than cost and systemic blame.
- **Complexity and distrust are minor issues**
  "It all feels too complicated" and "I don't trust the information about sustainability" score lowest across all groups.



BARRIERS ARE MORE IMPORTANT FOR ….

- **“Too expensive” is the biggest blocker across all segments**

  The Conscious (46%) and Lapsed (37%) segments are most affected by cost. Even the Committed (29%) still struggle with affordability, though less so.

- **Motivation and perceived impact differ strongly by group**

  The Unconcerned (25%) and Lapsed (29%) feel their actions don’t make a difference. The Committed (only 8%) largely believe in the value of their actions.

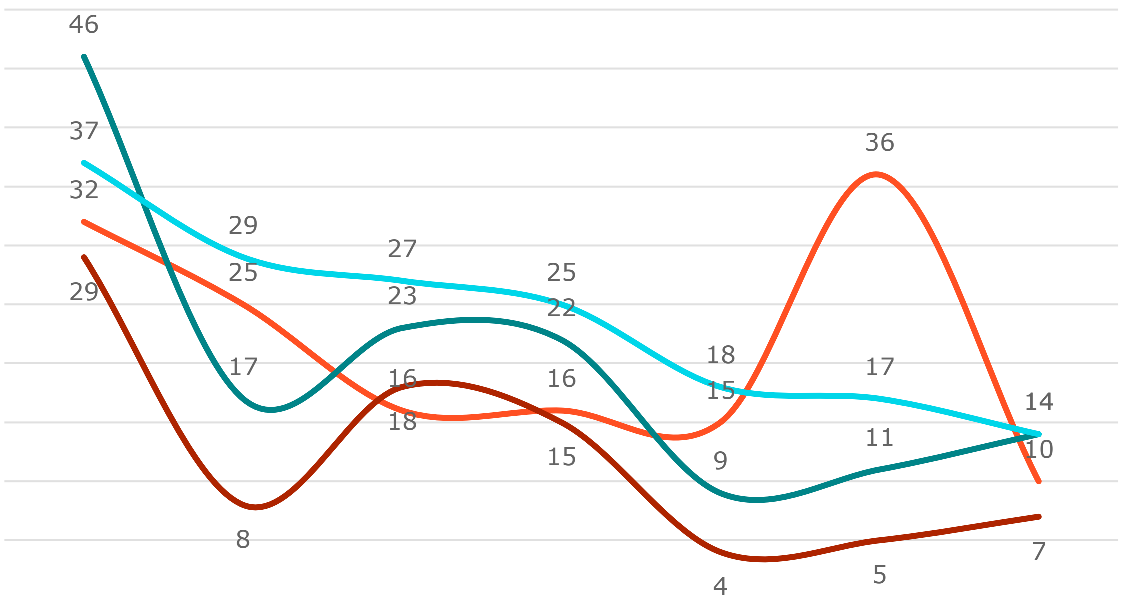
- **The Committed group shows the lowest blockers overall**

  They consistently report the lowest scores across all barriers. Their only relatively “high” blocker is cost (29%).

- **The Conscious are paradoxical**

  They are *highly motivated* but also *highly sensitive to cost* (46%) and complications (14%). They show relatively low distrust and low sense of futility.

ALL BLOCKERS X SEGMENTS

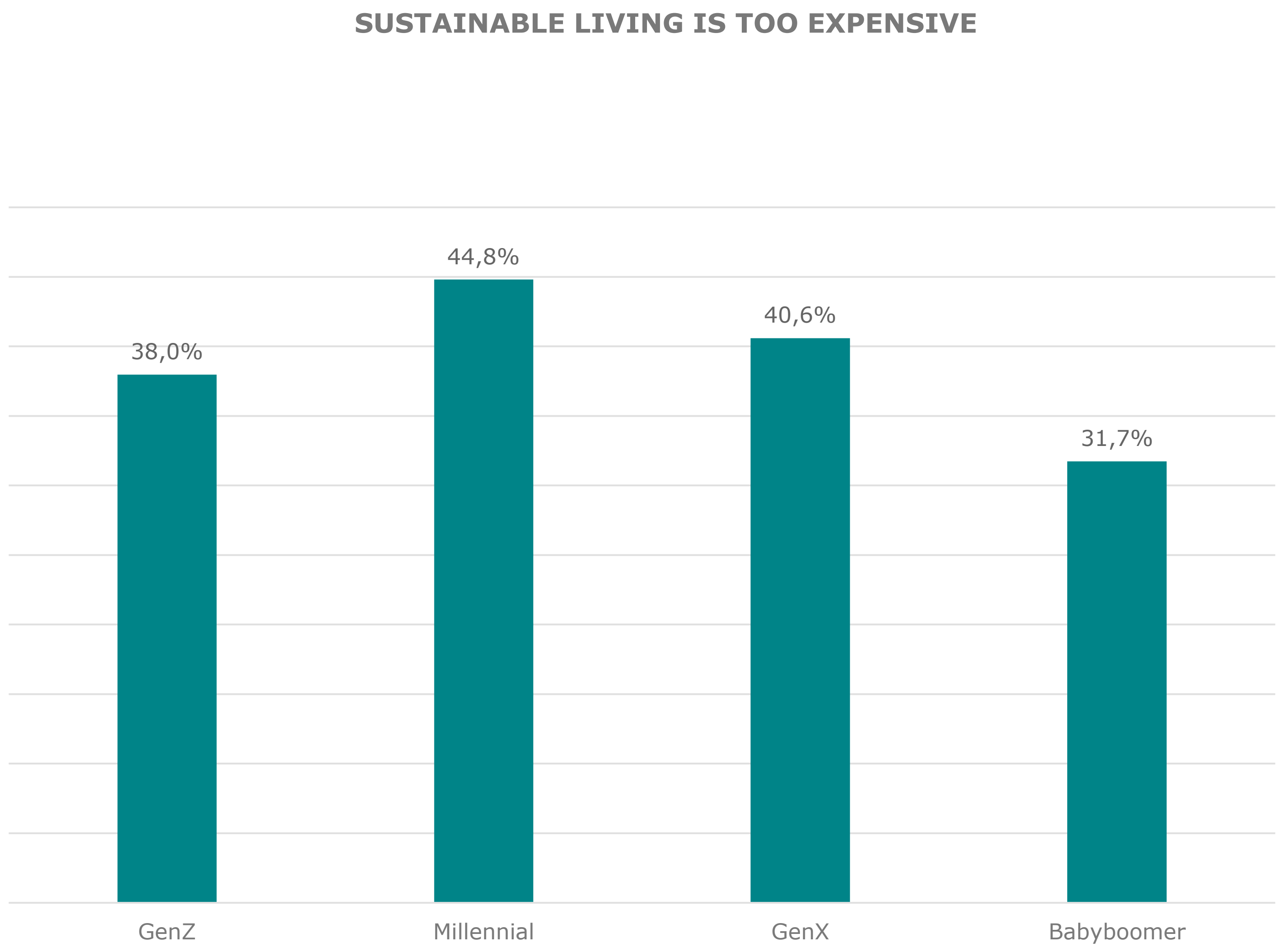


	Sustainable living is too expensive	My actions don’t make a difference	The government isn’t doing enough	Companies aren’t doing enough	I don't trust the information about sustainability	I don’t get anything in return	It all feels too complicated
The Unconcerned	32	25	16	16	15	36	10
The Conscious	46	17	23	22	9	11	14
The Lapsed	37	29	27	25	18	17	14
The Committed	29	8	18	15	4	5	7

The Unconcerned   The Conscious   The Lapsed   The Committed

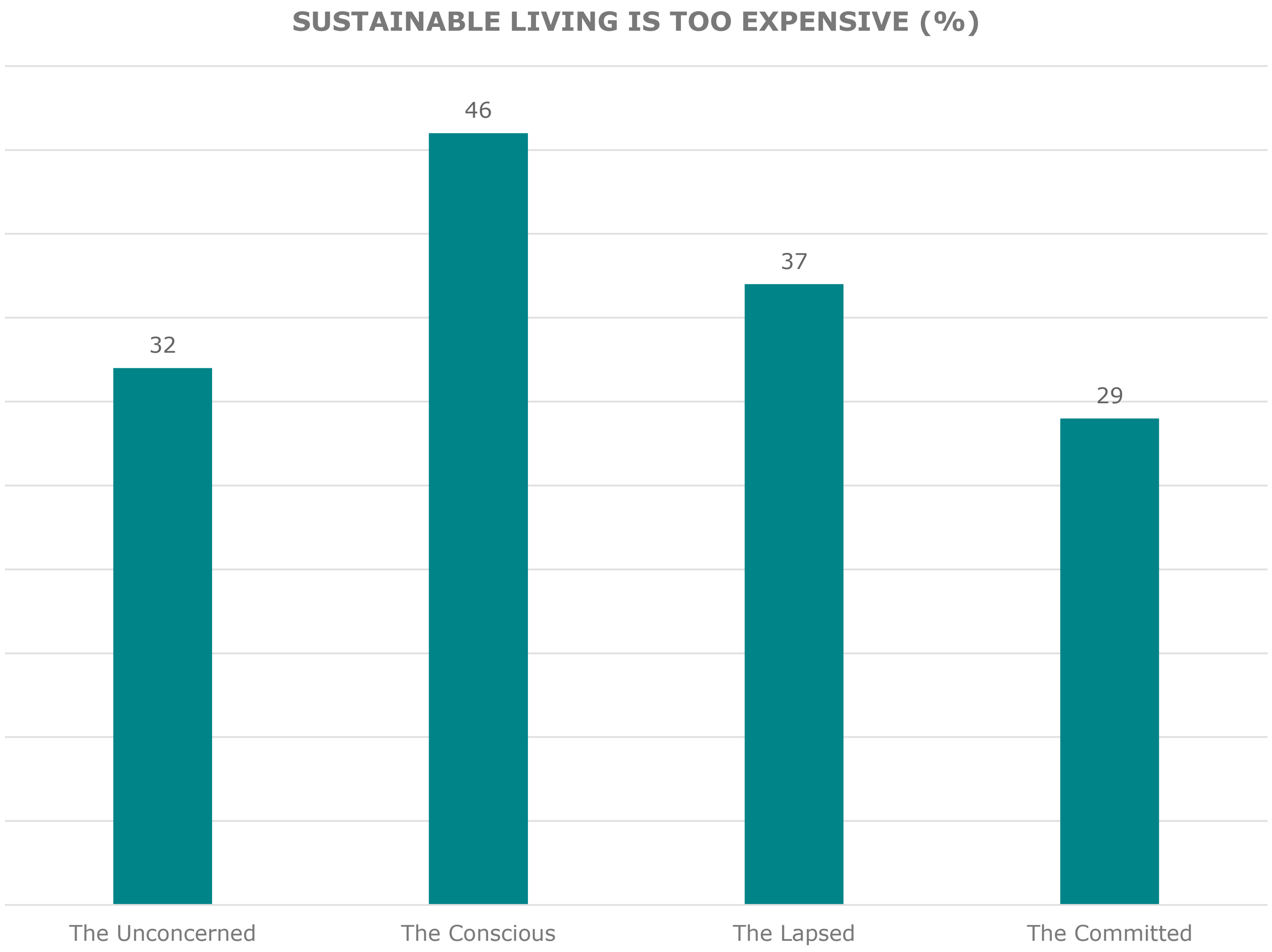
ZOOMING IN ON COST

- Across all generations, **cost is a significant barrier**, but it weighs most on **Millennials and Gen X**, the groups in their peak spending years.
- For **Gen Z**, affordability is also a key blocker, even if their values lean pro-sustainability.
- For **Baby boomers**, price plays a smaller role, possibly due to financial stability or lower engagement.



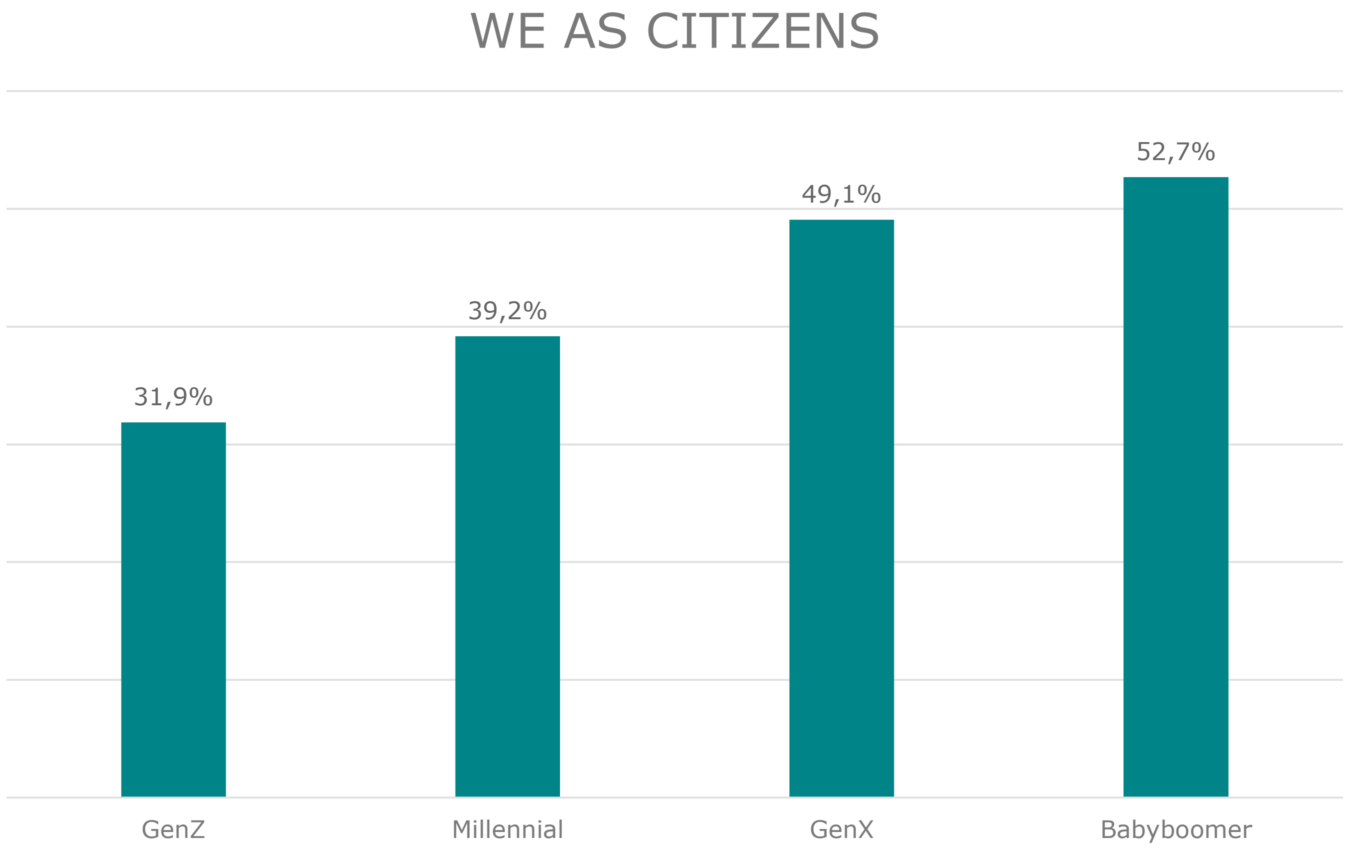
ZOOMING IN ON COST PER SEGMENT

- For all segments, cost is the biggest issue.
- Especially for the Conscious, it makes it difficult to change their behaviour in a structural way.



ALL EYES ON CITIZENS AND THE GENERATIONAL DIFFERENCES

While younger generations are more visible in street protests, it is the older generations who report a stronger sense of civic duty.



ZOOMING IN ON INACTIVITY OF ACTORS

Younger generations are more critical

Gen Z (24.7 percent companies, 25.9 percent government) and Millennials (23.6 percent companies, 25.8 percent government) are the most likely to say both companies and governments are not doing enough. This suggests younger groups have higher expectations of systemic actors and hold them accountable more strongly.

Criticism declines with age

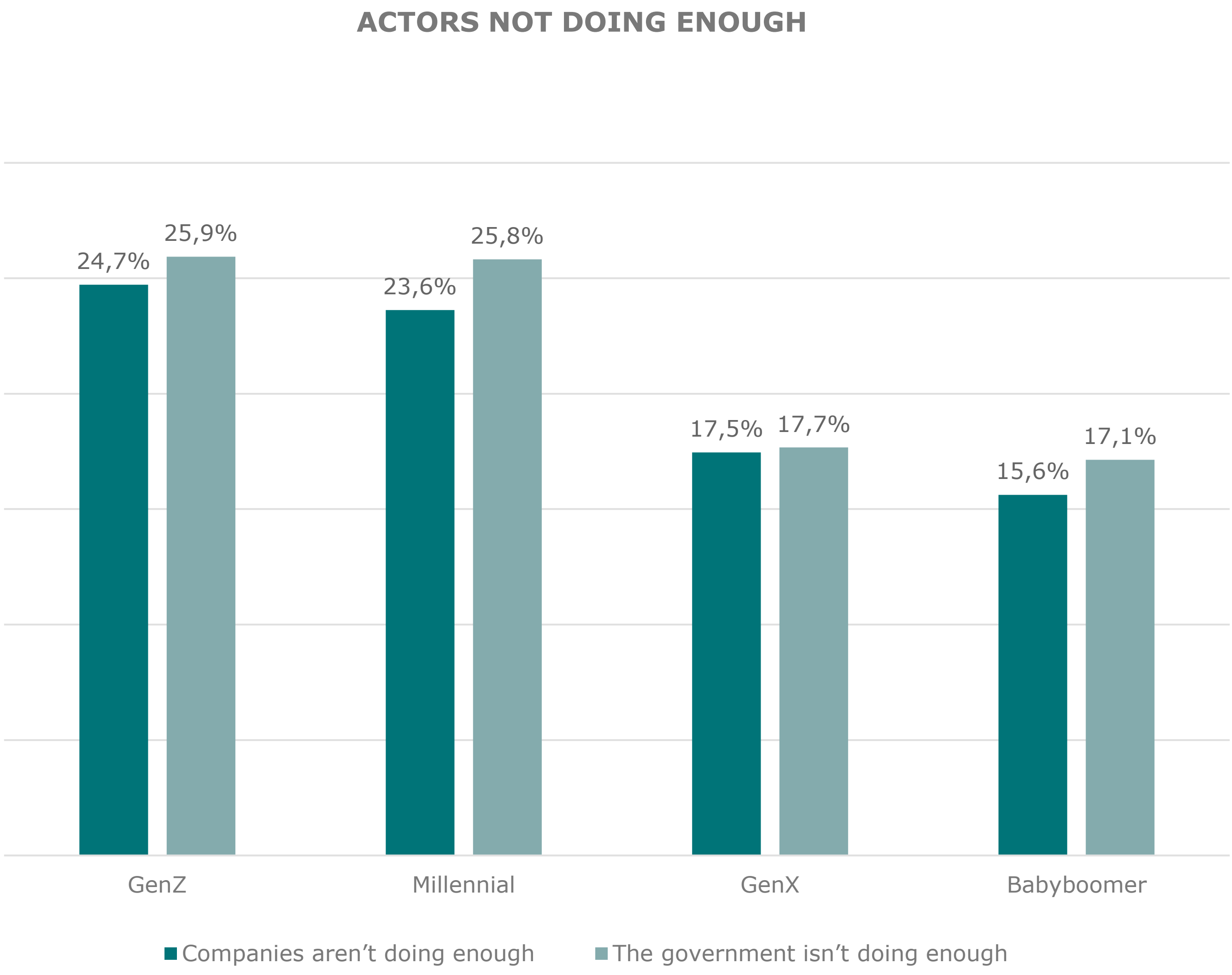
Gen X and Baby boomers show significantly lower levels of dissatisfaction. This could signal lower expectations of systemic change.

Government seen slightly more at fault than companies

In every generation, the government is judged more harshly than companies, though the difference is small (1–2 percentage points). This confirms the baseline belief that governments should take the lead in sustainability efforts.

Generational gap is substantial

Younger generations feel more directly impacted by climate change and sustainability issues. It might also explain the size of the Unconcerned cohort within the GenZ and Millenials.



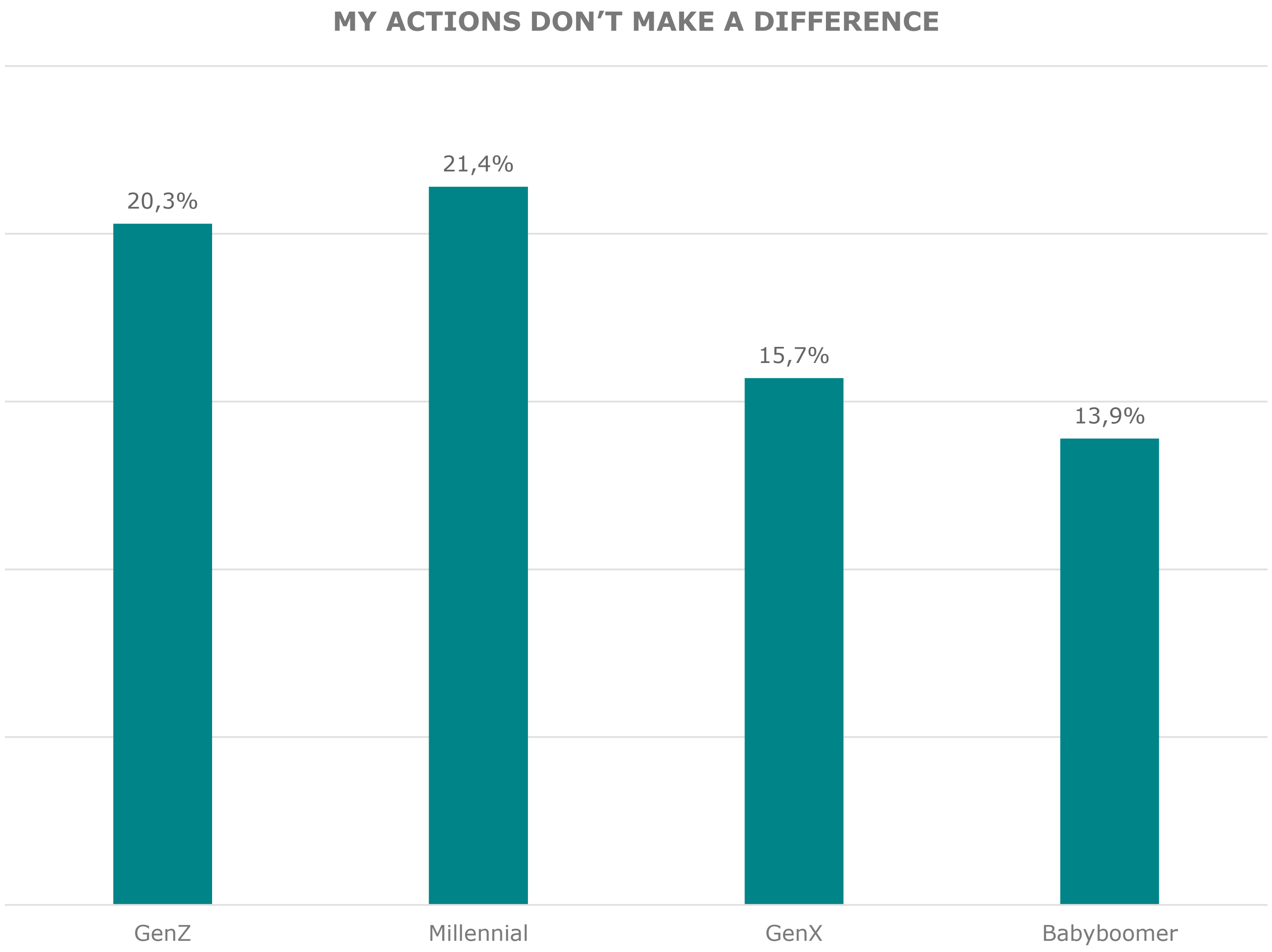
ZOOMING IN ON THE FEELING OF FUTILITY

Millennials are the most disillusioned and feel the greatest sense of futility
21,4% say their actions don’t matter, the highest of all groups.

Gen Z is close behind
20,3% share the same sentiment, showing that younger people overall are more skeptical about individual impact.

Older generations (Gen X and Babyboomers) are more optimistic
Only 15,7% (Gen X) and 13,9% (Babyboomers) feel powerless.

Generational paradox
The groups that will live longest with the consequences of climate, social, or economic change that comes with it (Gen Z and Millennials) are the ones who feel least empowered (one if five).



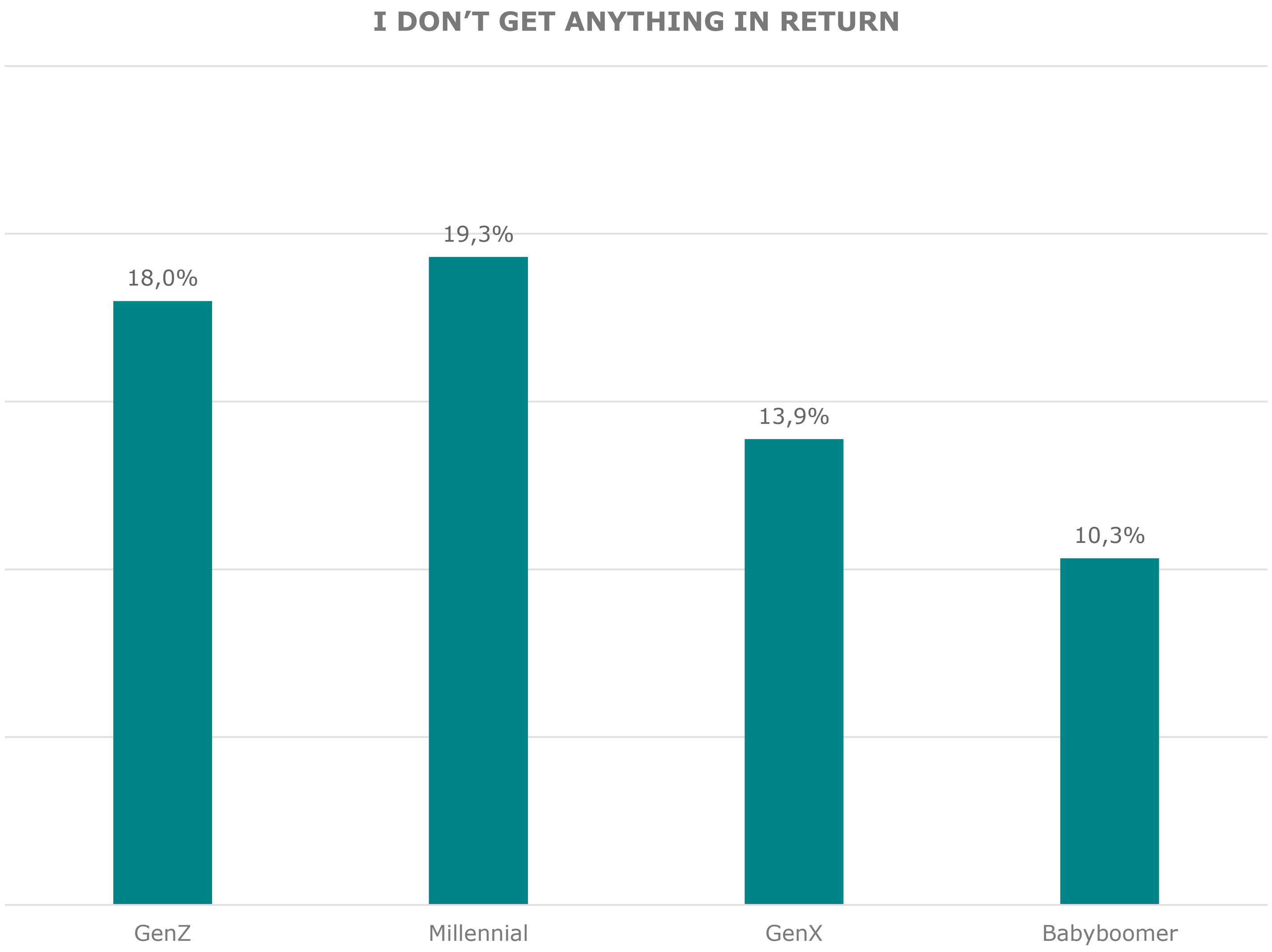
ZOOMING IN ON THE FEELING OF REWARD

Millennials and **Gen Z** have the highest percentages, at 19.3% and 18.0% respectively. This means nearly one in five people in these generations feel their efforts are unrewarded.

Gen X and **Baby Boomers** report this feeling less frequently, with percentages of 13.9% and 10.3%. The Baby Boomer generation has the lowest percentage, suggesting they are the least likely to feel this sense of unreciprocated effort.

The gap between the highest (Millennials) and lowest (Baby Boomers) groups is substantial, at 9 percentage points.

This feeling of not "getting anything in return" is closely related to the previous chart on the feeling of futility. It suggests a **disconnect between effort and reward**, which can lead to a sense of disillusionment explaining the higher % of the Unconcerned and Lapsed cohort within the younger generations.



ZOOMING IN ON THE FEELING OF COMPLEXITY

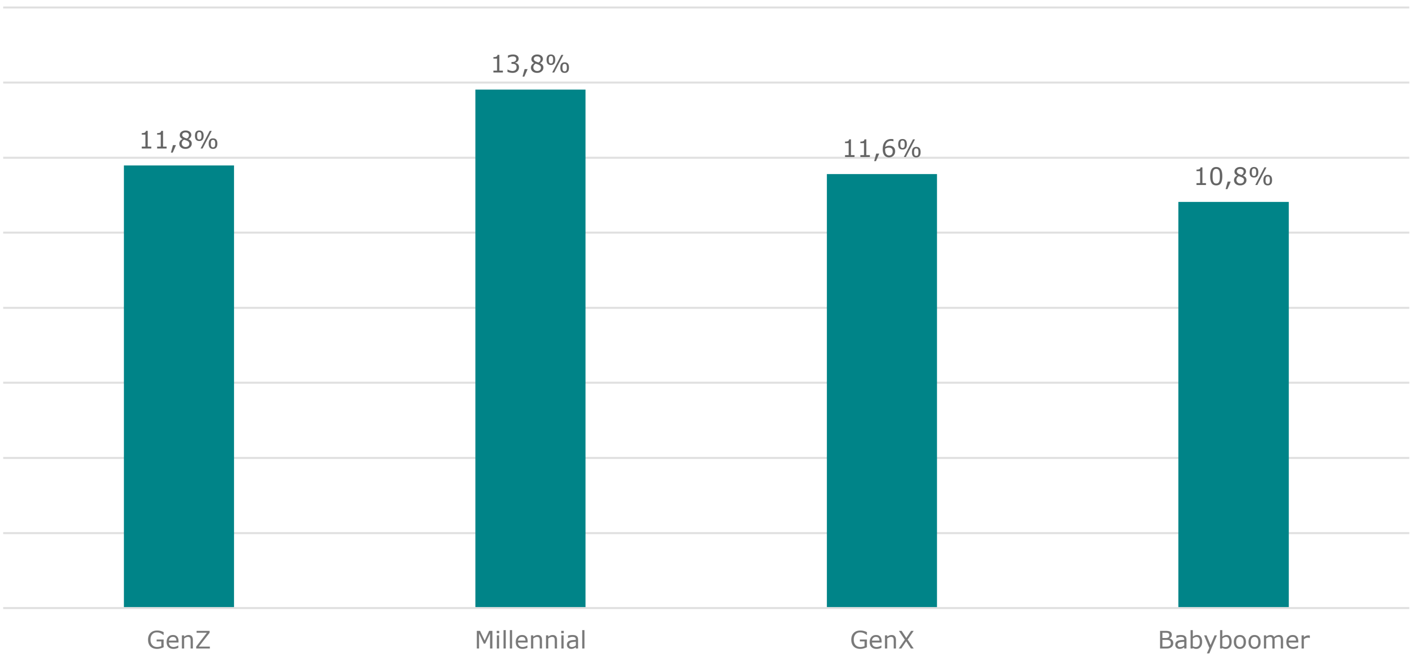
Percentages are relatively low across all generations. Between 10,8 and 13,8 percent say “it all feels too complicated.”

Millennials stand out slightly. They are the most likely to experience sustainability or responsible action as complicated, at 13,8 percent.

Generational differences are small. The gap between the highest and lowest group is only about 3 percentage points.

Compared to earlier charts, complexity is not the main obstacle. Lack of perceived impact and lack of perceived reward are bigger drivers of disengagement.

IT ALL FEELS TOO COMPLICATED

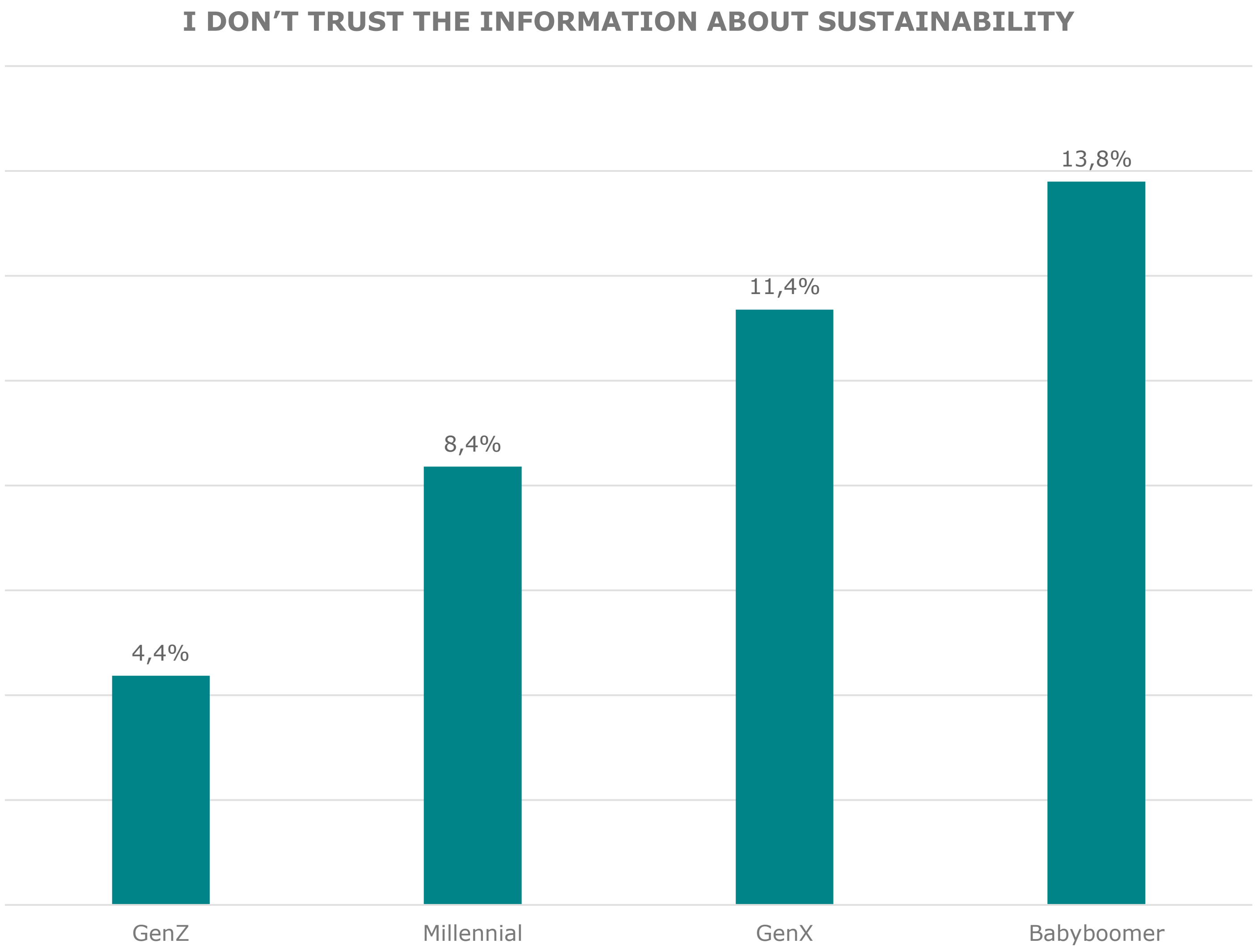


ZOOMING IN ON THE FEELING OF DISTRUST

Younger Generations (Gen Z & Millennial): Their high levels of trust could be due to growing up in a world where climate change is a mainstream topic. They receive information from a wider variety of sources and are more likely to have been taught about sustainability in school. Their distrust isn't in the message itself, but rather in the feeling that the message isn't being acted upon effectively.

Older Generations (Gen X & Baby Boomer): Their higher levels of distrust may stem from a different media landscape and life experiences. They have lived through various waves of public information campaigns, some of which may have been misleading . This could lead to a healthy skepticism or a general distrust of corporate or government claims about sustainability.

For all cohorts, the percentages of distrust are low. This suggests we might question the need for greenhushing, as the risk of being called a greenwasher appears overstated.



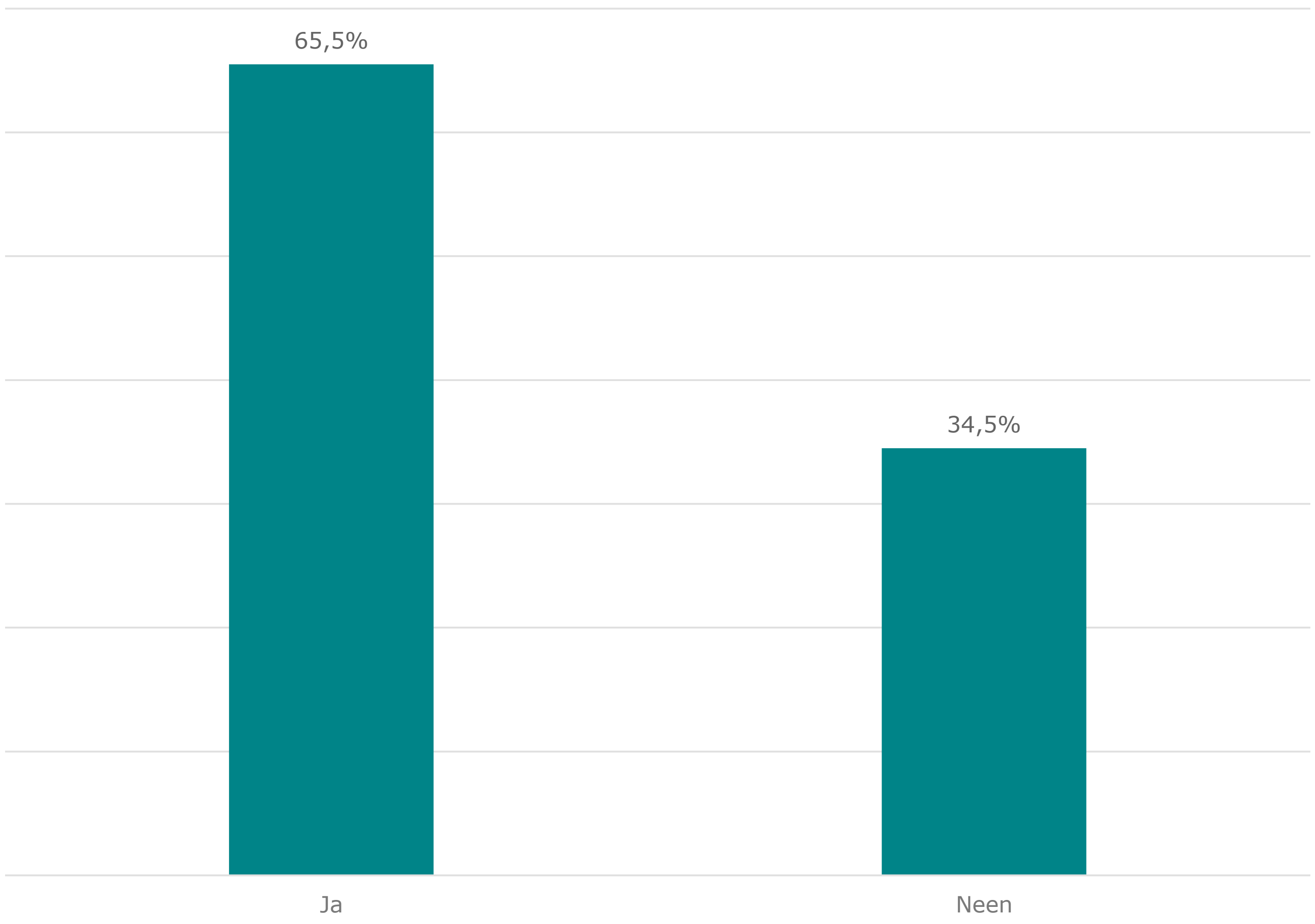
THE CONSUMER MANDATE

COMPANIES MUST HELP (EVERYONE)

Consumers expect companies and brands to address key barriers such as affordability, lack of know-how, limited understanding of impact, and ease of use.

Nearly seven in ten consumers indicate they want brands to provide such support, highlighting a significant opportunity for companies seeking to advance their sustainability transition with consumer engagement.

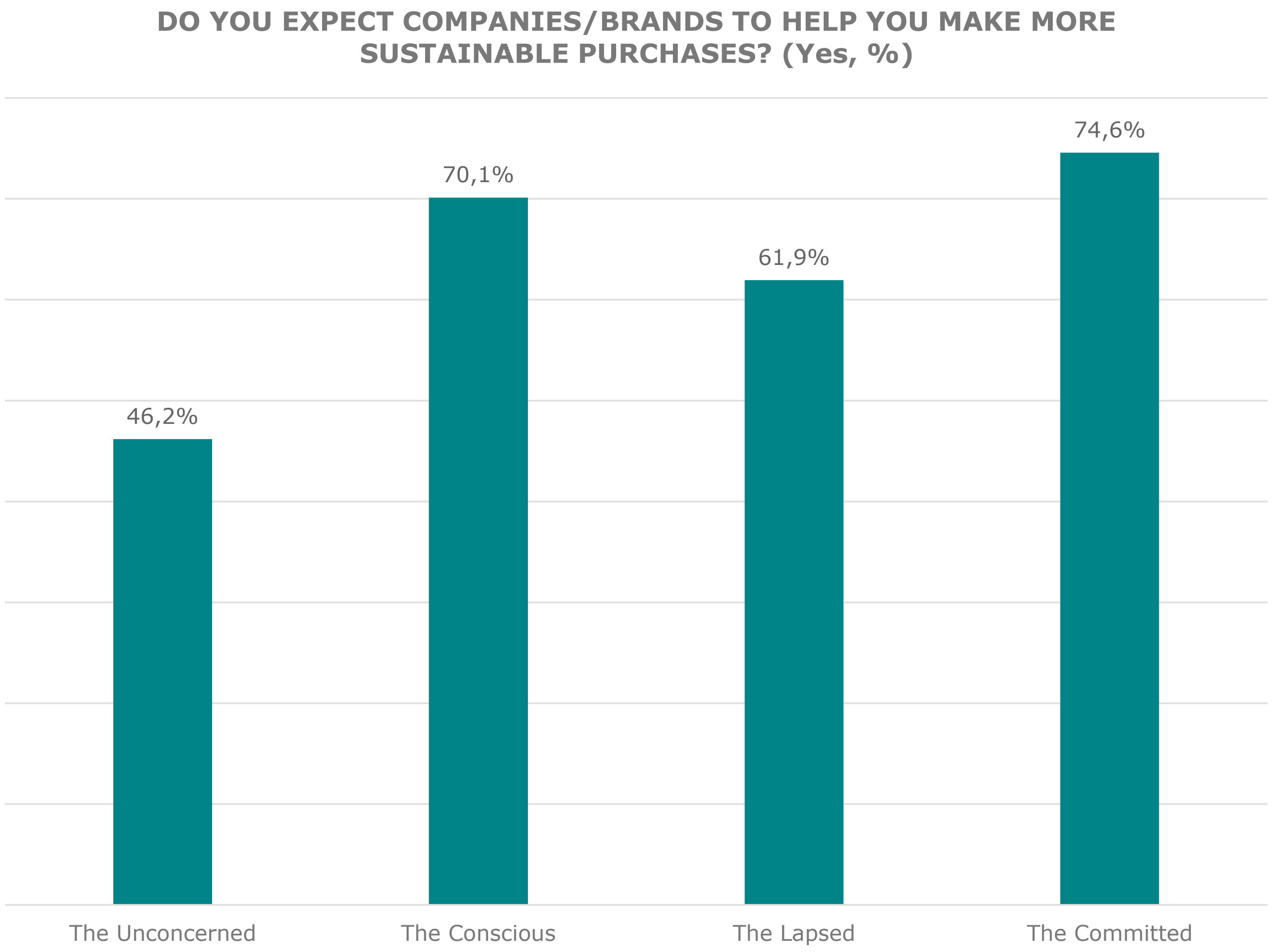
DO YOU EXPECT BRANDS TO HELP YOU BUY MORE SUSTAINABLY?



COMPANIES MUST HELP (SEGMENTS)

Every segment needs help from brands to make more sustainable purchases. Especially the Conscious and the Committed.

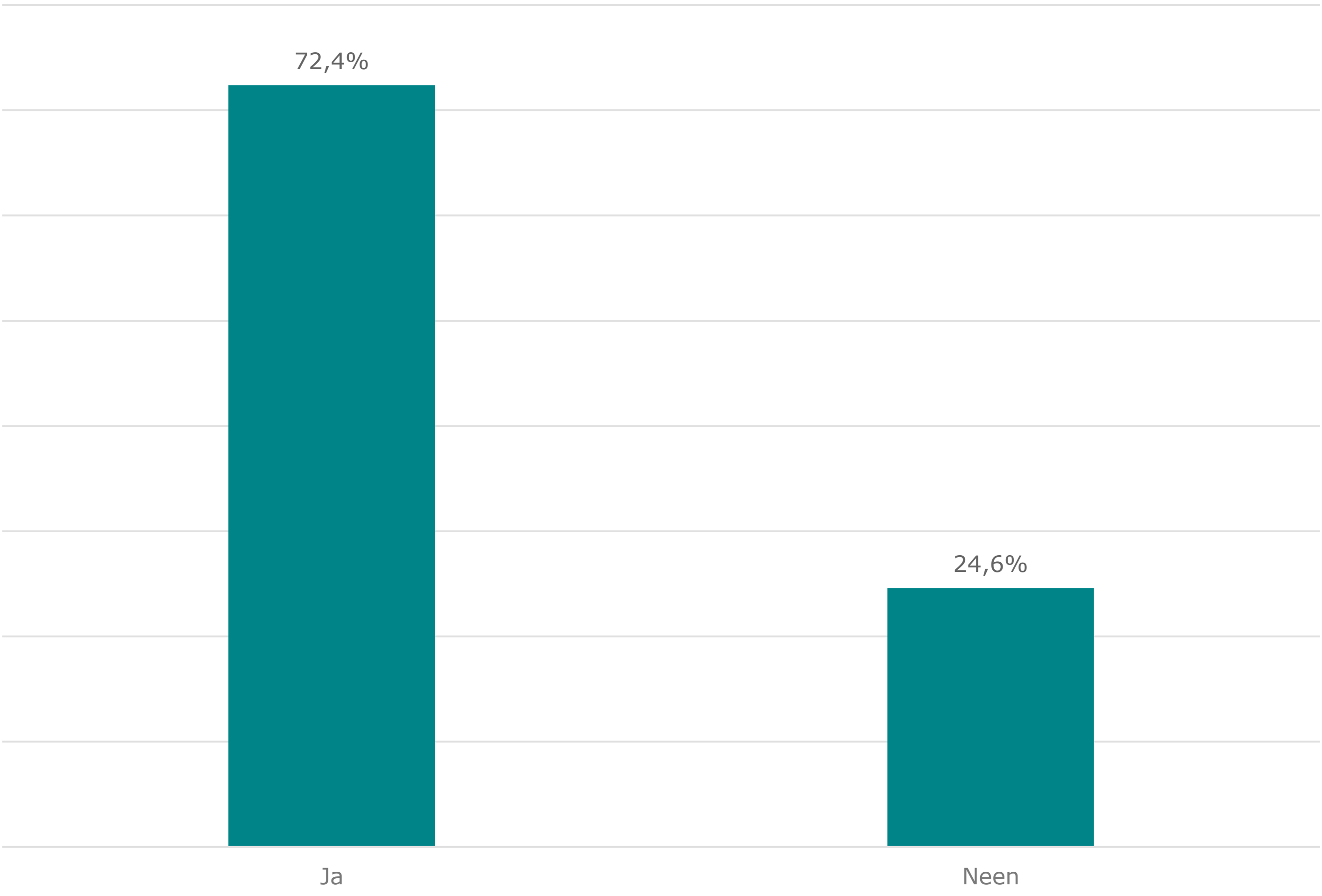
Alongside making it affordable, it is a priority to find out what helping the consumer really means and how it can create value.



COMPANIES SHOULD NOT BE AFRAID TO EXPLAIN WHAT IMPACT THEY OFFER

This suggests that clear and credible communication about consumer impact is a powerful lever for brands. The willingness to choose more sustainable options is already there, but consumers want proof that their choices matter.

IF BRANDS EXPLAINED HOW BUYING THEIR PRODUCTS SUPPORTS SUSTAINABILITY, WOULD YOU BE MORE LIKELY TO CHOOSE THEM?



QUANTIFYING THE CREDIBILITY DEFICIT

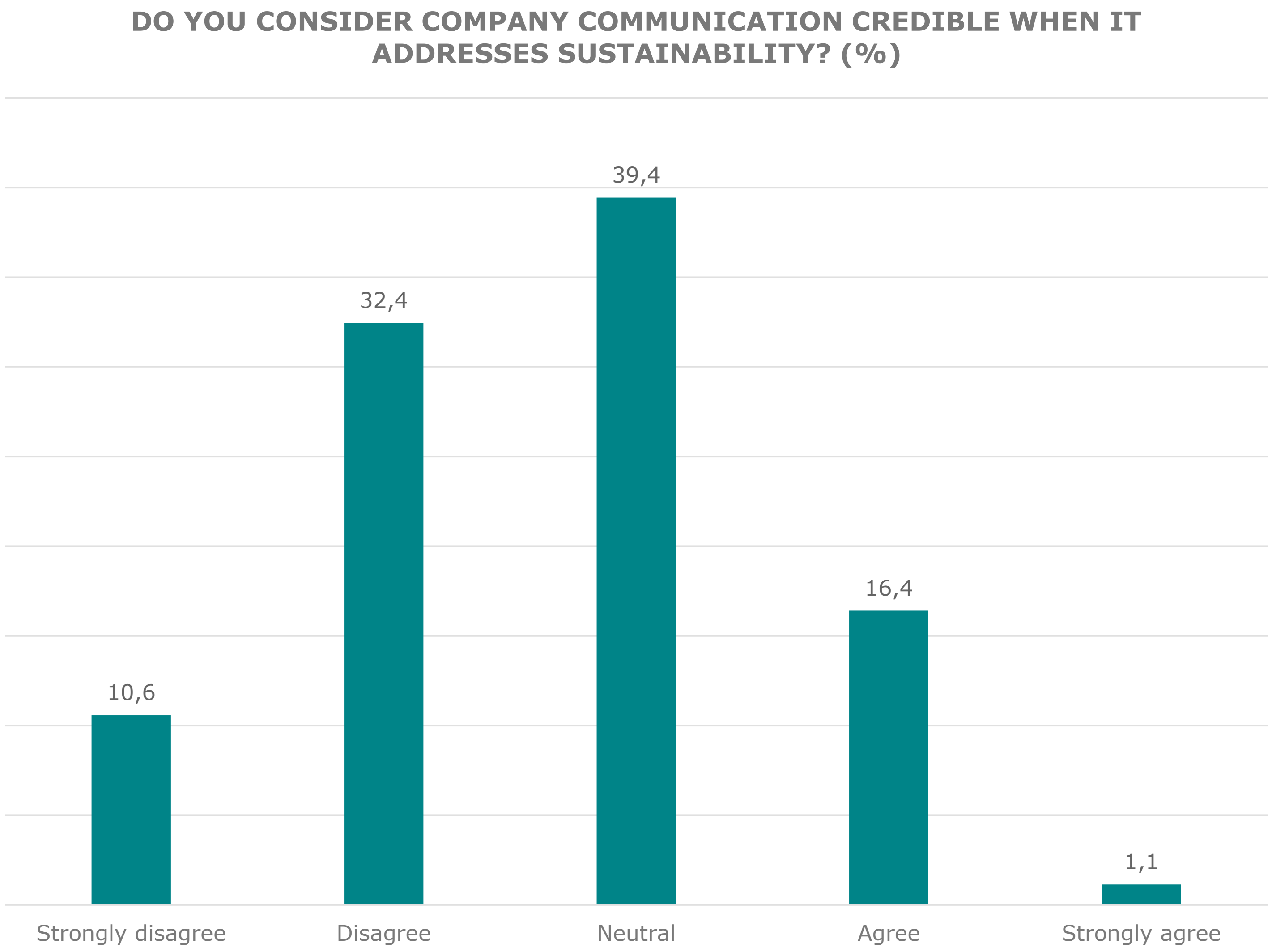
THE CREDIBILITY DEFICIT (GENERAL VIEW)

Skepticism dominates
Almost half of respondents express doubt, with 10,6 percent strongly disagreeing and 32,4 percent disagreeing.

Neutrality is high
39,4 percent remain neutral, which suggests a lack of information to form a clear opinion representing a opportunity for growth.

Credibilty is limited
Only 16,4 percent agree and a mere 1,1 percent strongly agree that company communication on sustainability is credible.

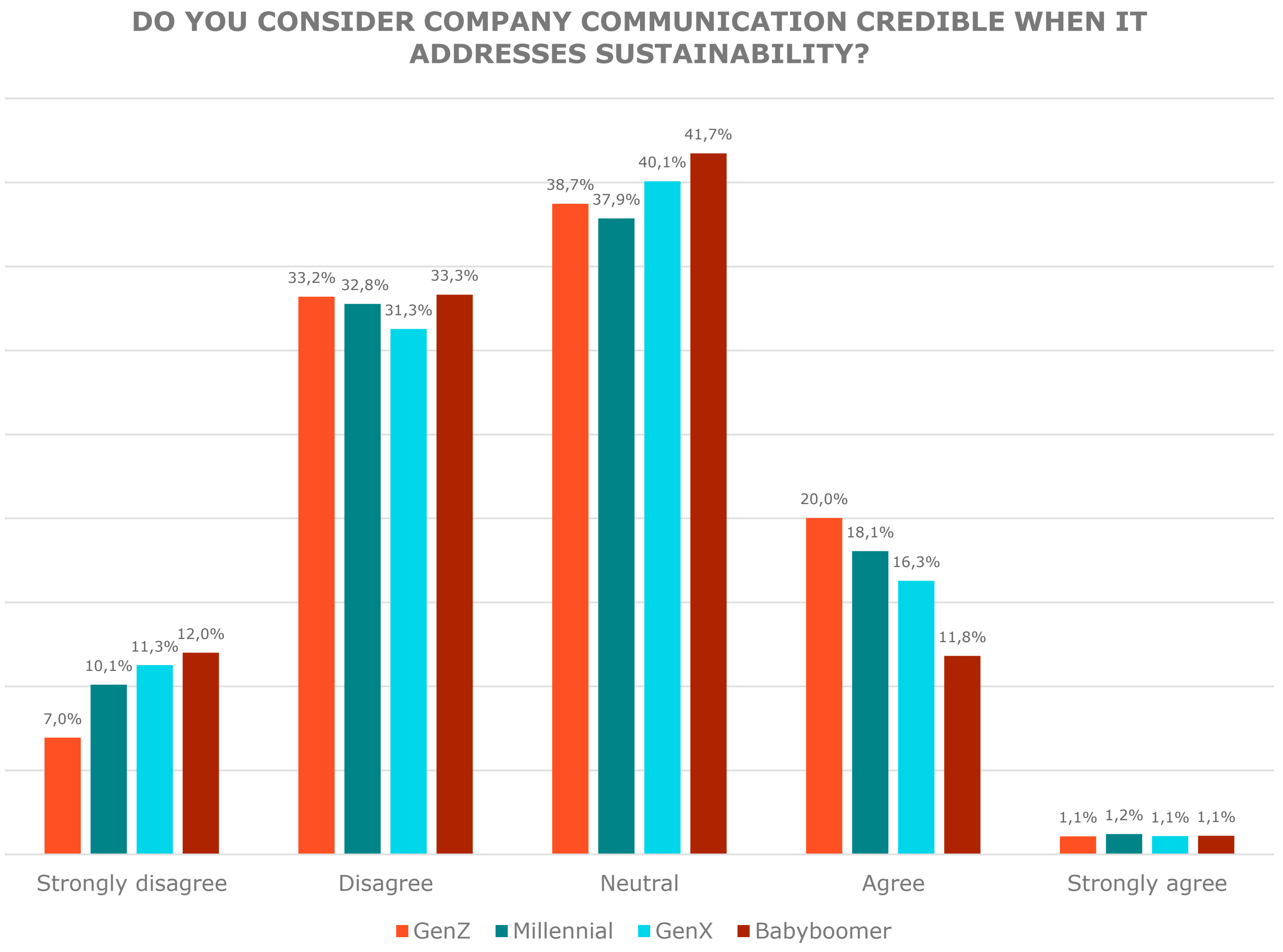
82,4% of consumers don’t believe or remain unconvinced by sustainability communication, and very few find it credible.



THE CREDIBILITY DEFICIT (GENERATIONAL VIEW)

When we look across generations, sustainability communication lacks credibility, with levels so low that neutrality and disbelief dominate.

- **Gen Z** is slightly more optimistic; they have the lowest "strongly disagree" and highest "agree" share.
- **Baby Boomers** are the most skeptical: the lowest "agree" (11.8%) and the highest "neutral" (41.7%). They seem less engaged or more doubtful overall.
- **Millennials** and **Gen X** fall in between, showing similar skepticism but not as disengaged as Boomers.

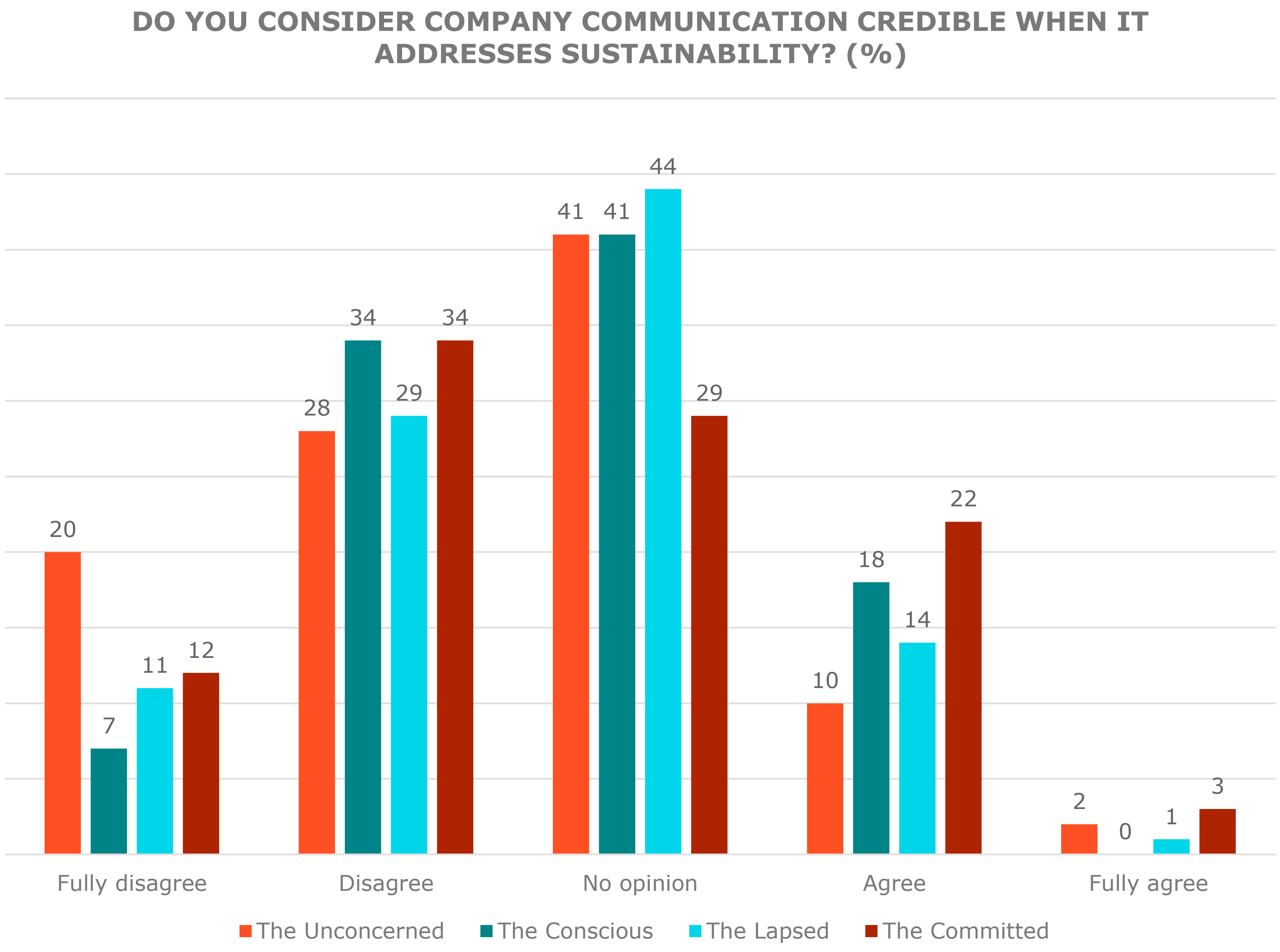


THE CREDIBILITY DEFICIT (SEGMENT VIEW)

82% of the Conscious, the biggest cohort, do not find sustainable communication credible or remain undecided.

75% of the Committed feel the same.

The very audiences that should be most receptive are not. That is a huge missed opportunity.



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HOW CREDIBLE IS IMPACT ADVERTISING IN THE NETHERLANDS?

DEFINITION OF IMPACT COMMUNICATION

DEFINITION

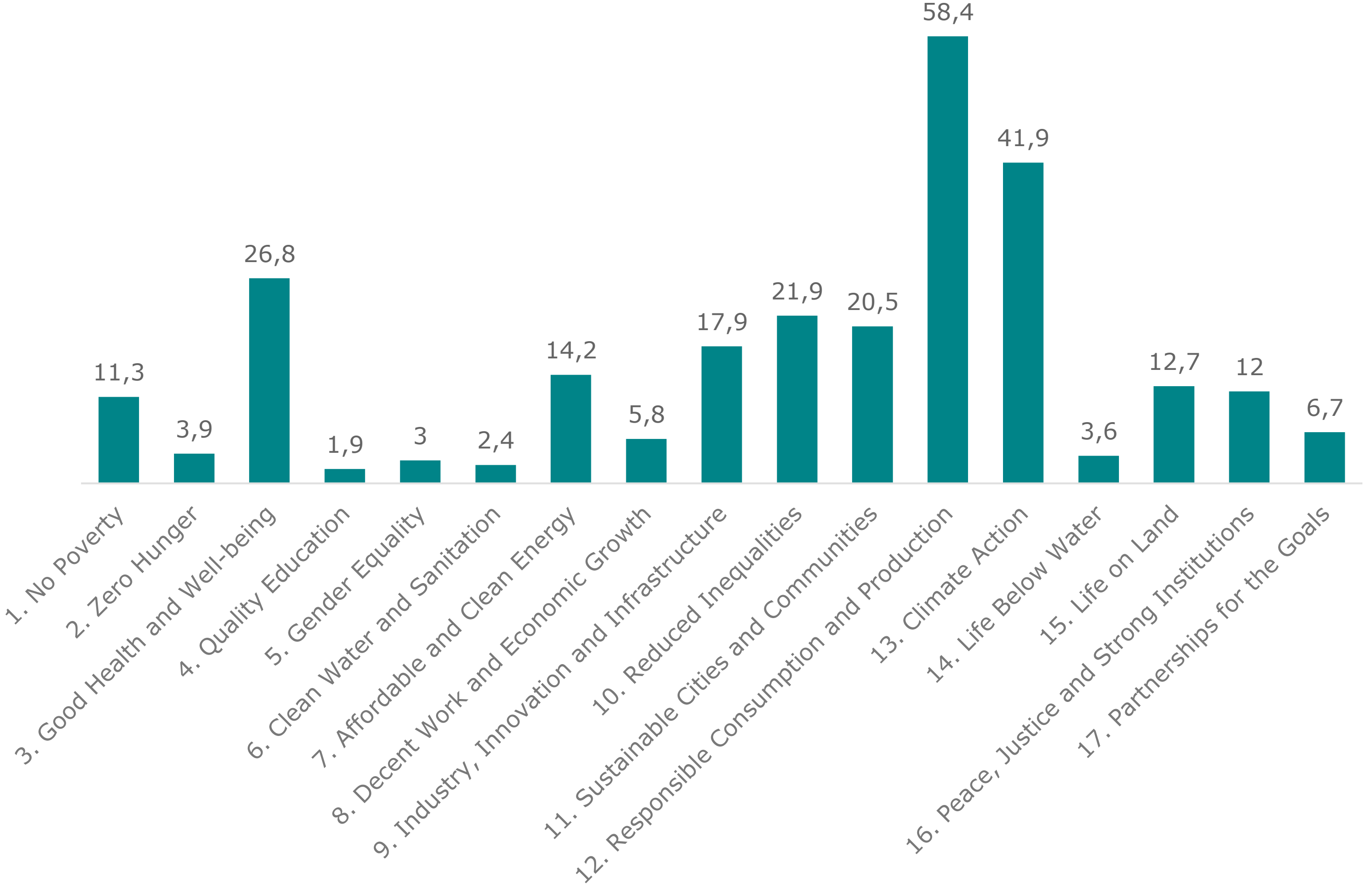
Impact communication is a communication approach designed to drive meaningful change, influence behavior, and/or demonstrate organisational impact. Using the 17 Sustainable Development Goals as an analytical framework ,we ensure comprehensive coverage across social, environmental, and economic dimensions.

DISTRIBUTION OF SDGS ACROSS COMMUNICATIONS

- Most communication messages (58%) can be attributed to SDG 12 – Responsible consumption
- 42% of the communication storylines align with SDG 13 – Climate Action
- 27% map to SDG 3 – Good health and Well-being

(one communication storyline can be mapped to one or more SDGs)

MAPPING SDGS TO IMPACT COMMUNICATION ASSETS (%)



NET CREDIBILITY SCORE AND THE FOUR CONSUMER SEGMENT

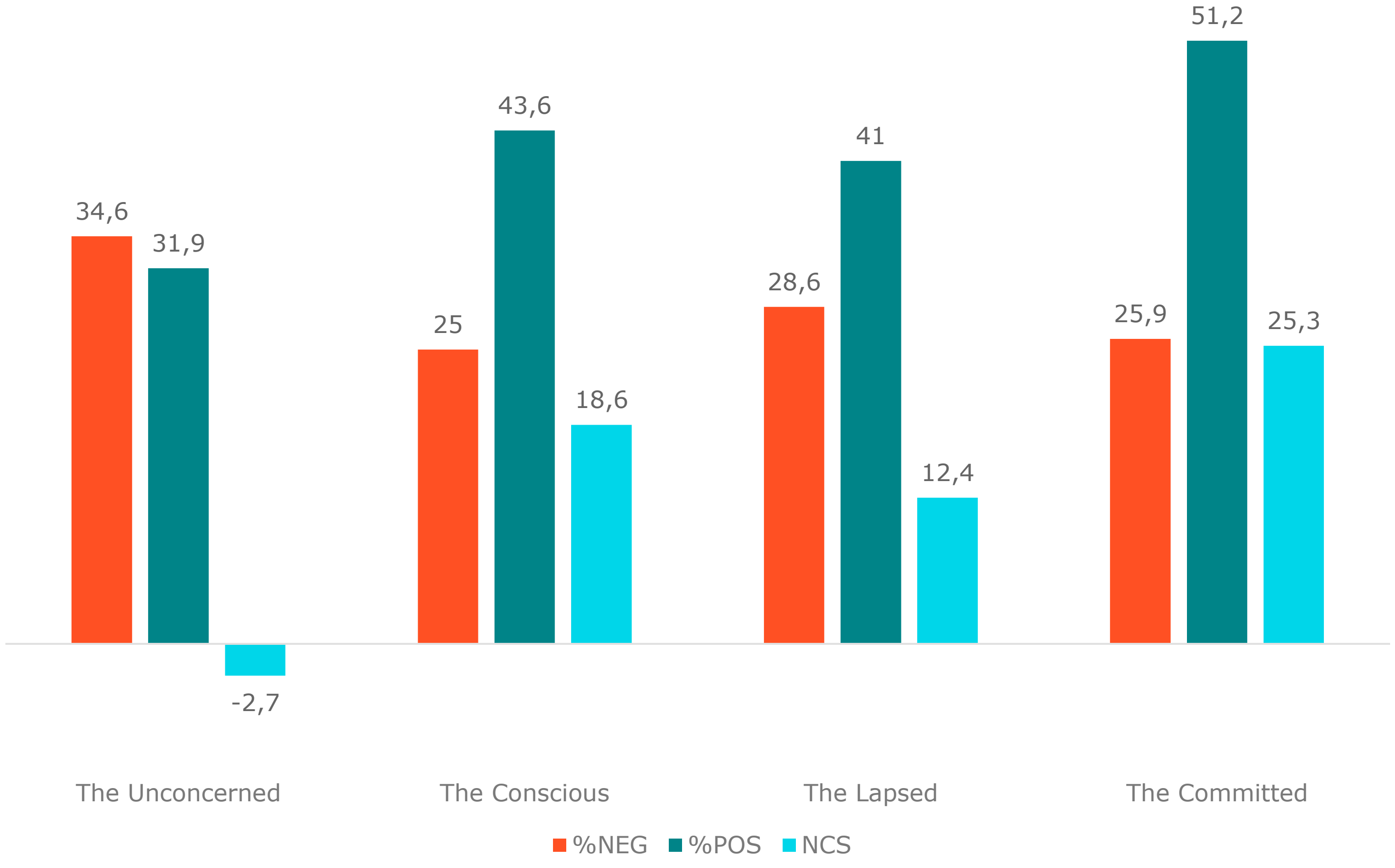
The Committed rate 52% of impact campaigns as credible and 26% as not credible, resulting in an NCS of 25.3.

The Lapsed find 41% of campaigns credible and 29% not credible, yielding an NCS of 12.4.

The Conscious perceive 43% of campaigns as credible and 25% as not credible, producing an NCS of 18.6.

The Unconcerned view only 32% of campaigns as credible while 35% are deemed not credible, resulting in a negative NCS of -2.7.

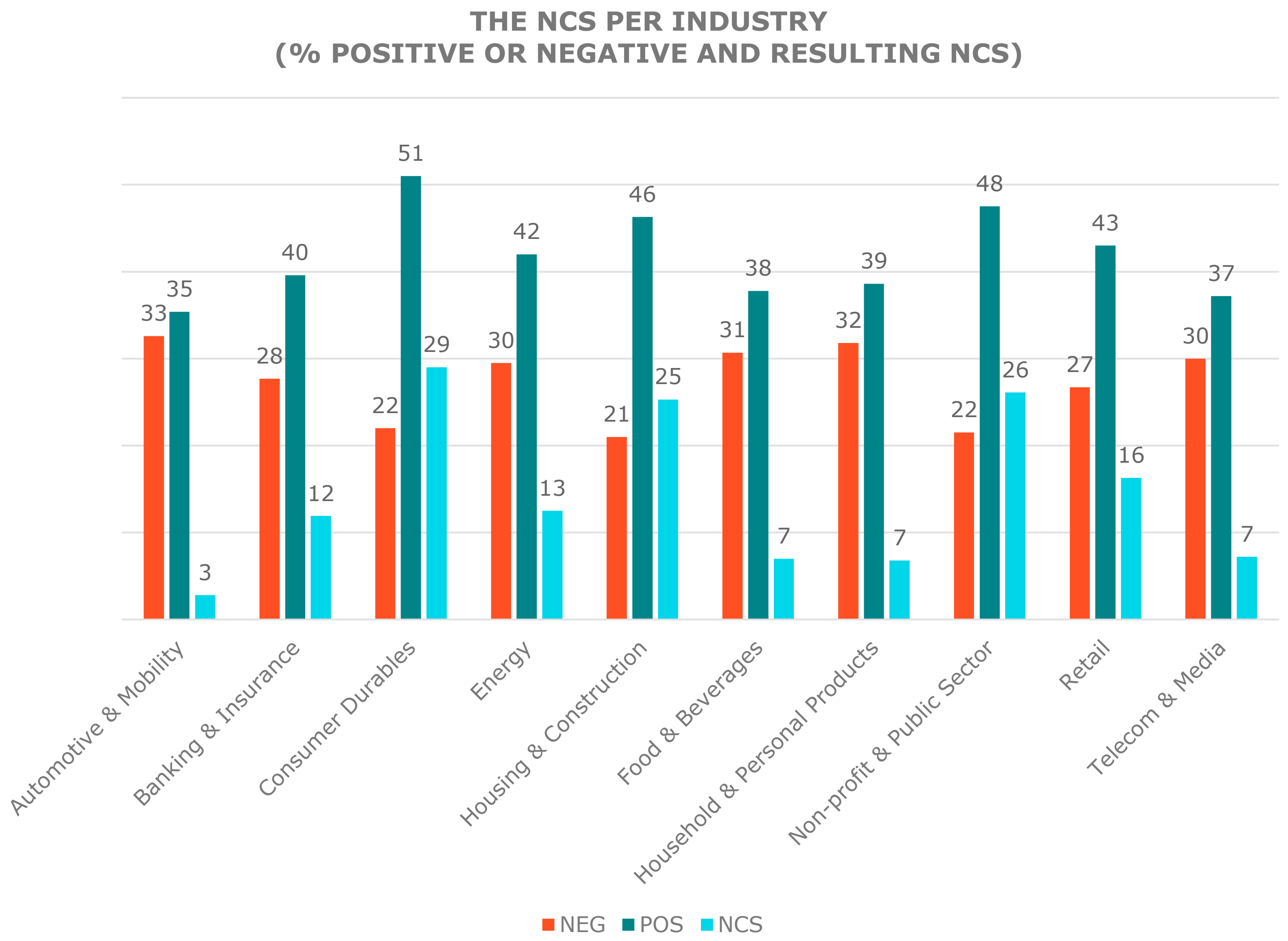
THE NCS OF THE FOUR SEGMENTS
(% POSITIVE OR NEGATIVE AND RESULTING NCS)



NET CREDIBILITY SCORE PER INDUSTRY

Consumer Durables and the **Non-profit/Public Sector** perform best, with strong credibility scores, while Automotive & Mobility and Food & Beverages struggle with credibility. Overall, skepticism remains high, showing that most industries face a significant credibility gap in their impact communication.

Automotive & Mobility – credibility is fragile: positive and negative perceptions are almost equal, resulting in a very low NCS.
Banking & Insurance – decent positive perception, but still weighed down by a sizable share of skeptics.
Consumer Durables – strongest performer, with more than half of consumers finding campaigns credible, leading to the highest NCS.
Energy – mixed picture, with credibility growing but skepticism still notable.
Housing & Construction – good momentum, campaigns manage to convince more consumers than they lose.
Food & Beverages – trust remains weak, with high positive recognition but equally high skepticism, resulting in a low NCS.
Household & Personal Products – credibility is fragile, many consumers remain unconvinced.
Non-profit & Public Sector – second-best performer, campaigns are trusted by nearly half of the audience, with strong NCS.
Retail – balanced performance: campaigns resonate with many but leave a notable group unconvinced.
Telecom & Media – credibility deficit: positive recognition is modest while skepticism remains high.



AT THE CAMPAIGN LEVEL, THE NCS GAP IS SIGNIFICANT

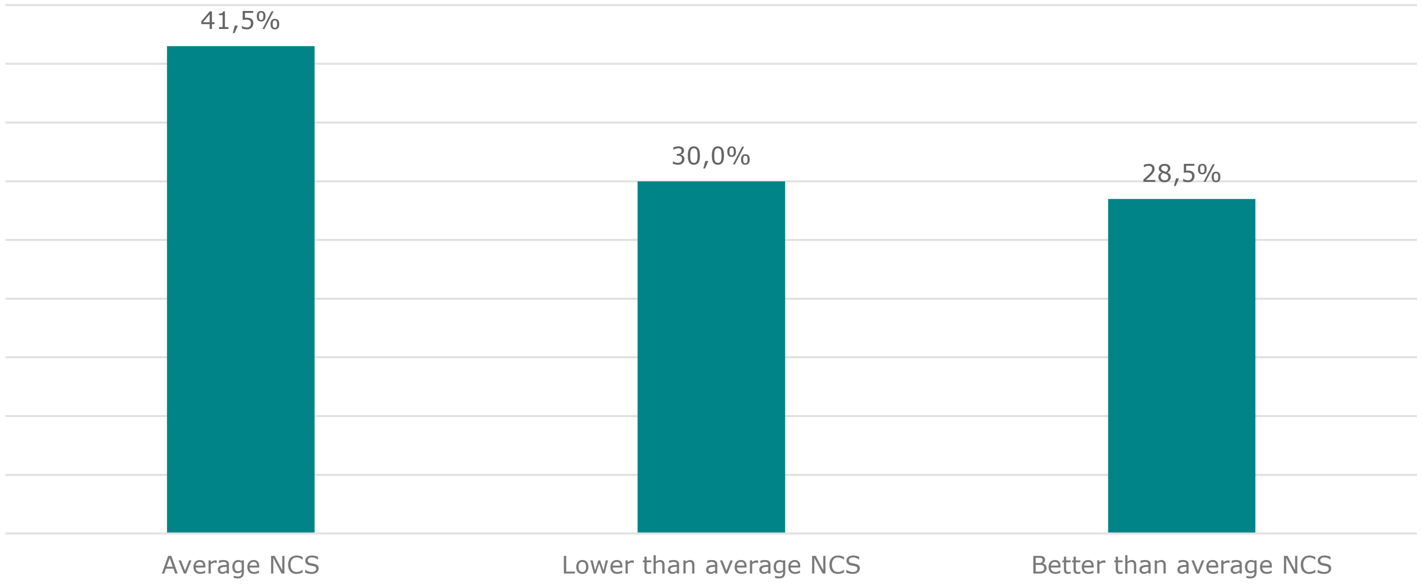
There is significant variation between the best and worst scoring campaigns: the gap is 102 points. This 102 point gap highlights the importance of the credibility divide and the urgent need for a blueprint. A blueprint the industry must embrace if it wants to create more impact and close the gap.

When we look at the different clusters, we find that a third of all campaigns have an NCS above average, another third score below average, and the largest cluster (41.5%) consists of campaigns with average NCS scores.

To close the NCS gap and grow the better than average cluster, we need to understand what drives the credibility of impact campaigns. In other words, how can we ensure more consumers perceive impact communication as credible?

Best scoring advert	NCS 67
Least scoring advert:	NCS -35
Gap:	102

CAMPAIGN CLUSTERING BASED ON NCS (%)



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OPPORTUNITIES FOR GROWTH

THERE IS ROOM TO INCREASE CREDIBILITY PERCEPTIONS OF IMPACT COMMUNICATION

42% of Dutch citizens believe impact advertising is credible. This is divided into 36.4% who find it somewhat credible and only 5.8% who find it very credible. There is clear room for growth by moving people from "somewhat" to "very" credible.

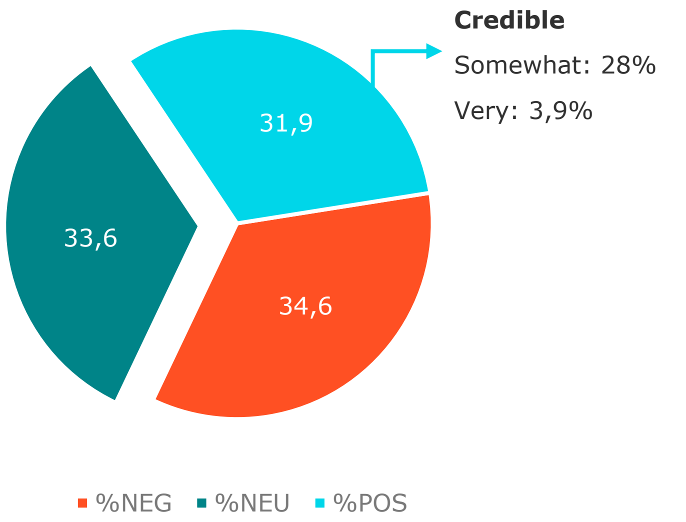
One third of Dutch citizens (30.7%) respond neutrally when asked about the credibility of impact advertising. This represents a significant untapped potential. Demonstrating greater honesty, commitment, and appeal could help shift these neutral consumers toward more positive perceptions.

The level of neutrality varies by consumer type. Among the **Committed** (13% of the population), neutrality is less common, as half already find impact advertising credible.

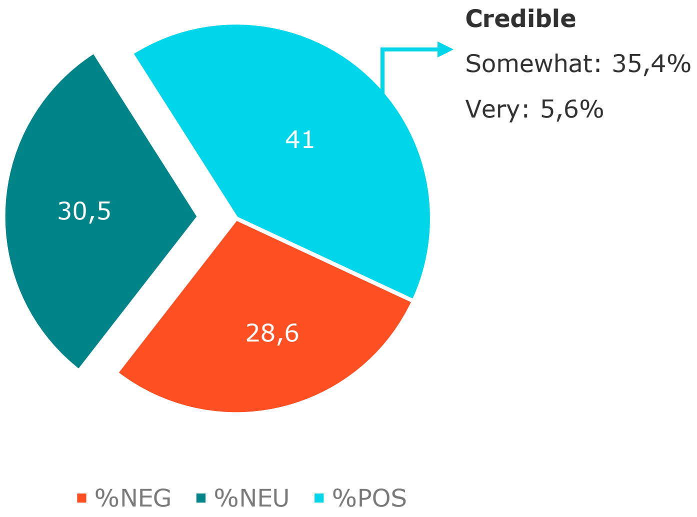
Among the **Conscious**, the largest segment at 61% of the population, one third remain neutral, representing the biggest growth opportunity.

Even 30% of the **Lapsed** (7% of the population) are neutral, suggesting potential to rebuild trust and grow the **Positives** (currently 41%) through greater honesty, stronger commitment, and clearer appeal.

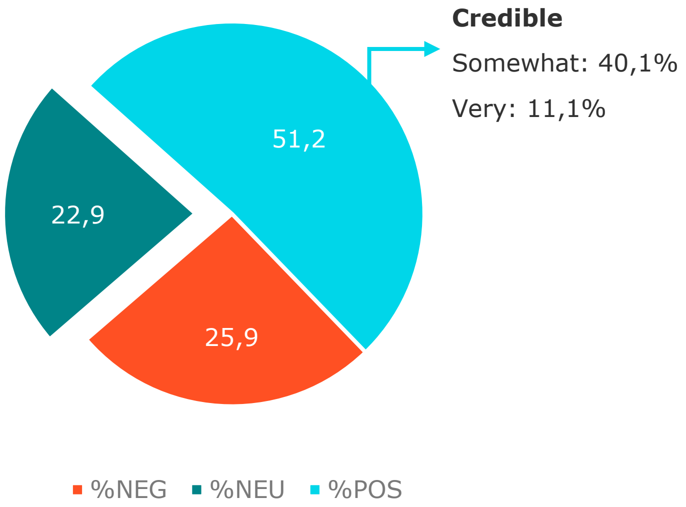
THE UNCONCERNED



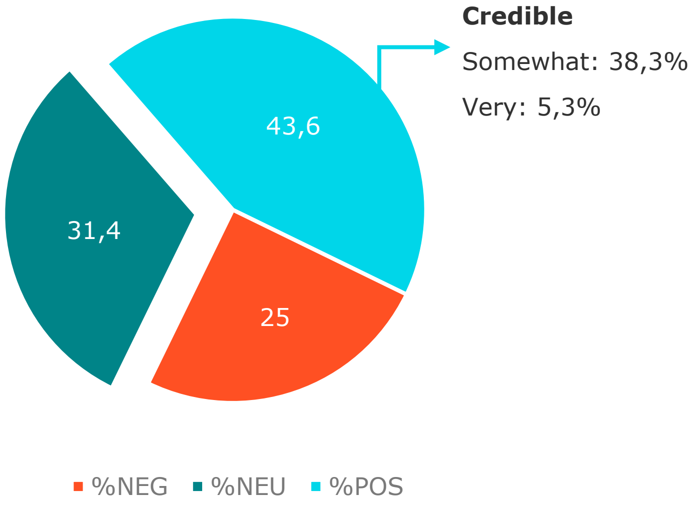
THE LAPSED



THE COMMITTED



THE CONSCIOUS



INDUSTRIES HAVE PLENTY OF OPPORTUNITY TO PUT MORE IMPACTFUL COMMUNICATION IN FRONT OF CONSUMERS

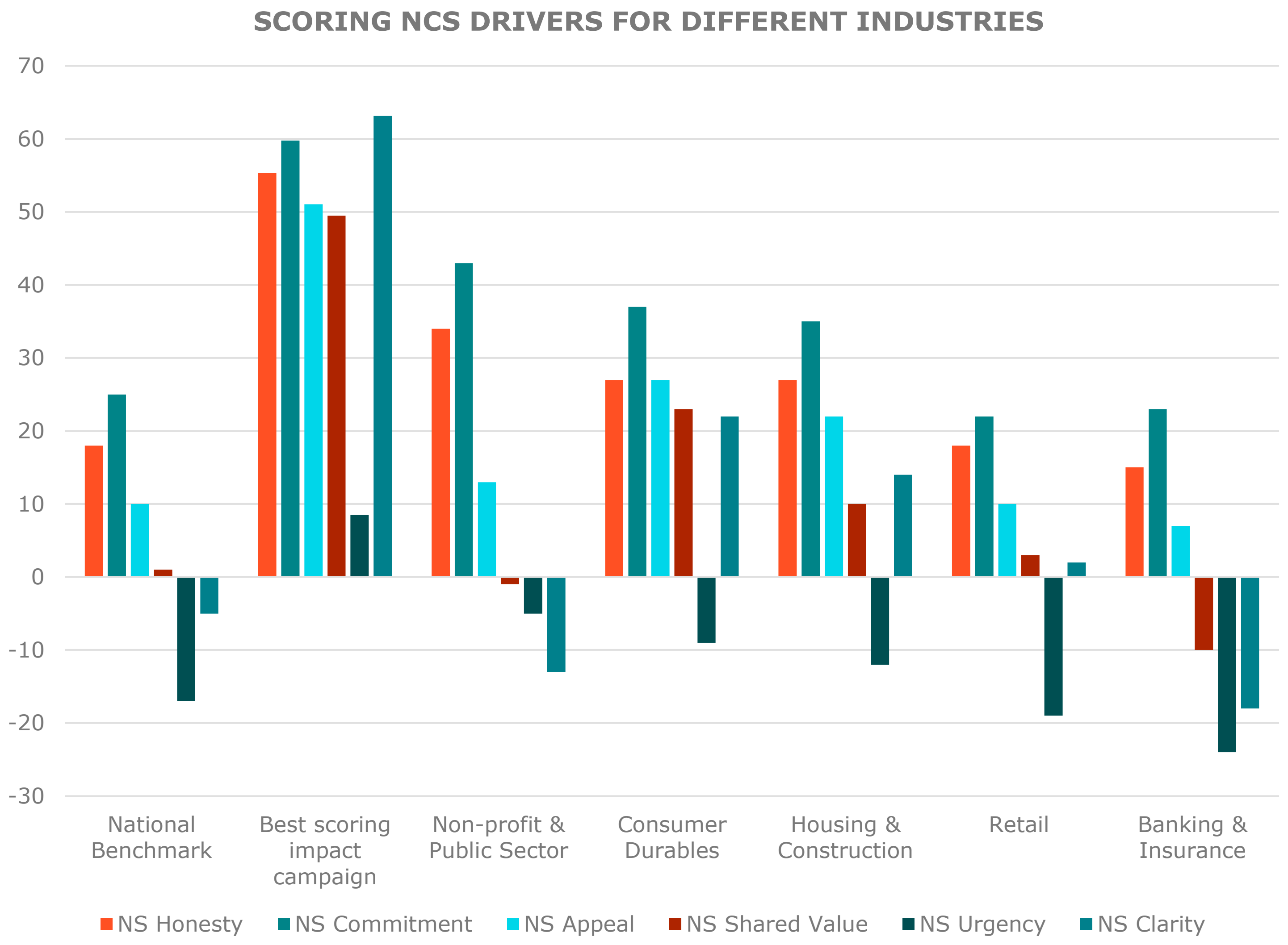
Industry Performance Against Benchmarks

Most industries have significant opportunities to improve their impact communication effectiveness. By enhancing key credibility drivers, sectors can increase consumer motivation and brand consideration.

Performance Tiers:

Above Benchmark: Non-Profit & Public Sector leads all industries, exceeding the national benchmark. Consumer Durables and Housing & Construction also surpass national averages. However, all three still lag considerably behind the best-performing campaign, indicating untapped potential.

Around the Benchmark: Retail and Banking & Insurance perform at national average levels.

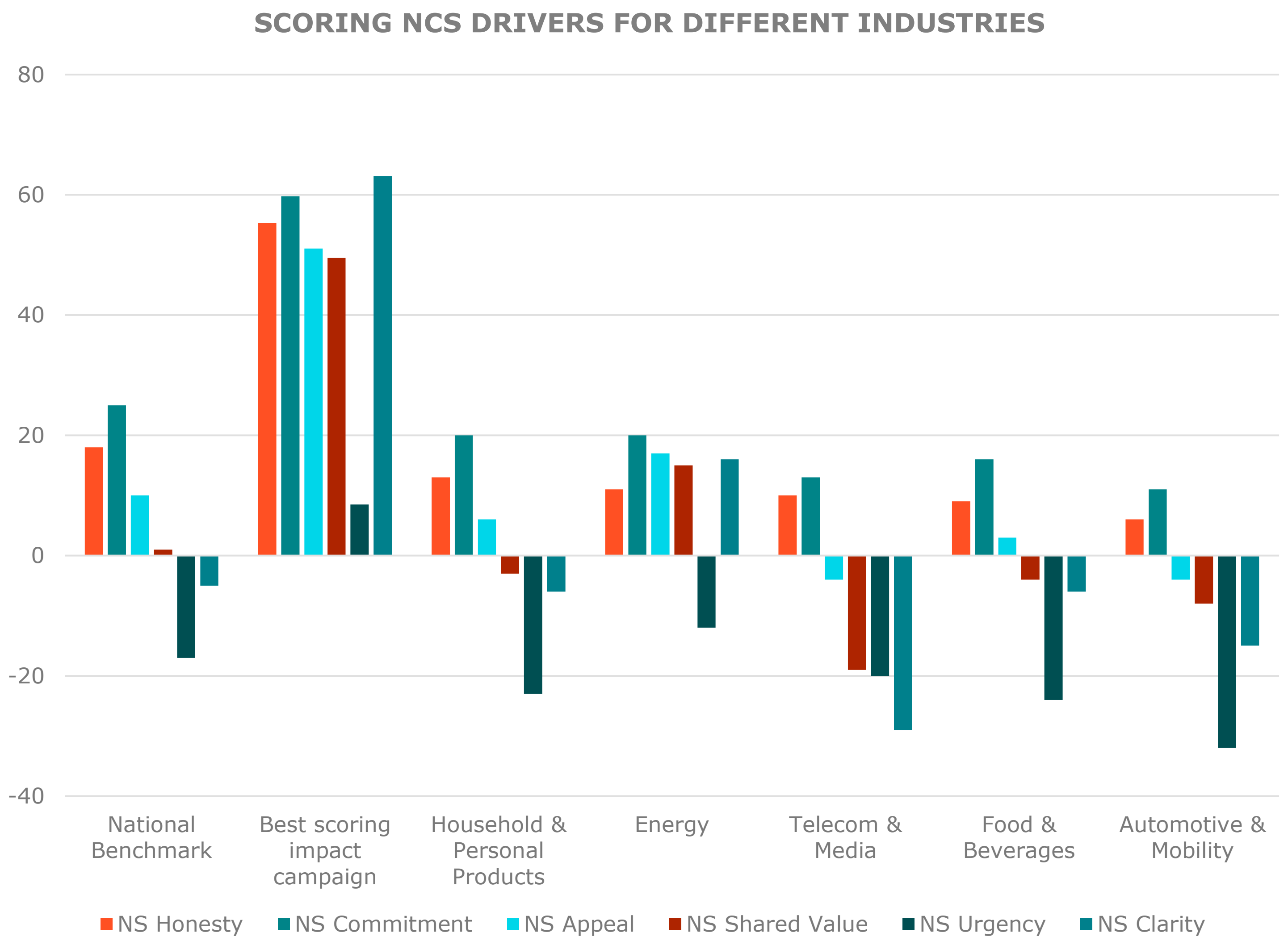


INDUSTRIES HAVE PLENTY OF OPPORTUNITY TO PUT MORE IMPACTFUL COMMUNICATION IN FRONT OF CONSUMERS

Below Benchmark: Household & Personal Products, Energy, Telecom & Media, Food & Beverages, and Automotive & Mobility lag behind both national averages and top campaign performance.

These sectors must strengthen Honesty, Commitment, and Appeal to build credibility and reach the untapped Conscious segment (61% of consumers). Without improvement, they forfeit significant opportunities for consumer motivation and brand consideration.

Systemic Challenge: Every sector underperforms on Shared Value, Urgency, and Clarity, revealing a systemic blind spot in Dutch impact communication. This widespread weakness suggests these drivers have been historically neglected.



THE CREDIBILITY BLUEPRINT

THE SIX DETERMINANTS OF IMPACT COMMUNICATION CREDIBILITY

1. Honesty (high priority)
With the highest weight, perceived honesty is the single most important factor determining campaign credibility. Consumers must believe "this brand genuinely means it" and perceive the campaign storyline as sincere.

2. Commitment (priority)
The second strongest driver shows that consumers assess whether brands are genuinely committed to sustainability or simply ‘running a campaign’. Long-term brand dedication matters.

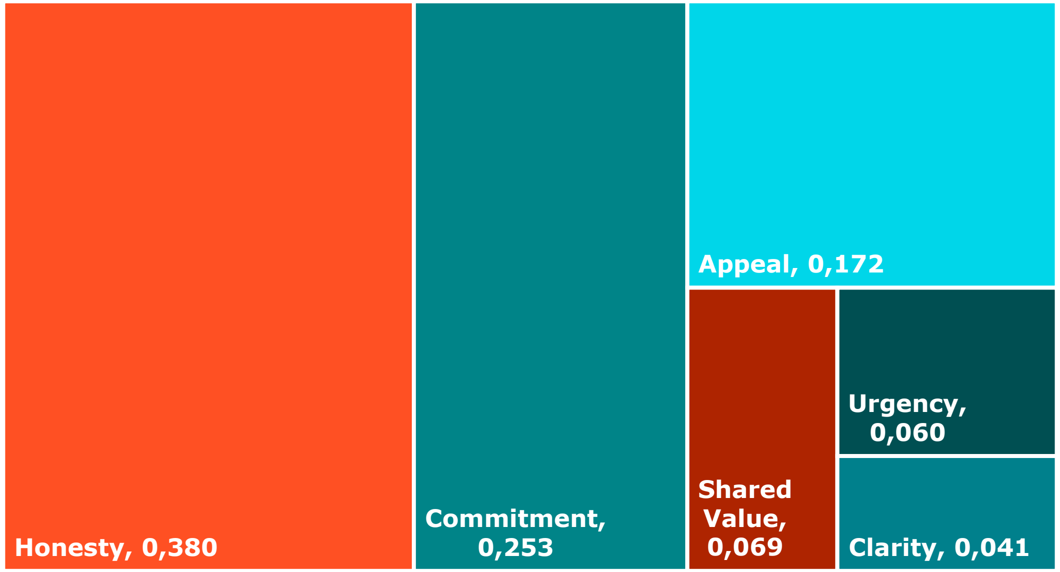
3. Appeal (moderate effect)
The third driver with a more moderate effect is appeal or the degree to which people can relate to types of solutions advertised. When people see solutions that resonate with their values and seem achievable, it strengthens belief in the campaign.

4. Shared value (minimal effect)
Clearly explaining the benefits to consumers and society has a minimal effect on the credibility of the storyline.

5. Urgency (minimal effect)
Creating a sense of urgency also has a minimal effect on credibility. That does not mean urgency is irrelevant. As we will see on a following slide, it powerfully drives motivation (.496).

6. Clarity (minimal effect)
Explaining how the company helps solve sustainability problems has virtually no impact on credibility. This is counterintuitive but critical: people don't need to fully understand your solution to find you credible. However, clarity does have a moderate effect on motivation.

DETERMINANTS OF IMPACT COMMUNICATION CREDIBILITY AND THEIR WEIGHTS



The table shows which factors most strongly influence the perceived credibility of impact campaigns. The weights represent the relative importance of each driver, with higher values indicating stronger influence.
(standardized regressions weights)

All determinants together (Honesty, Commitment, Appeal, Shared Value, Urgency, Clear Solution) explain **65.2%** of variance in Credibility

Weights:
.>30: High priority
.20-.29 : priority
.10-.19: moderate effect
< .10: Minimal effect

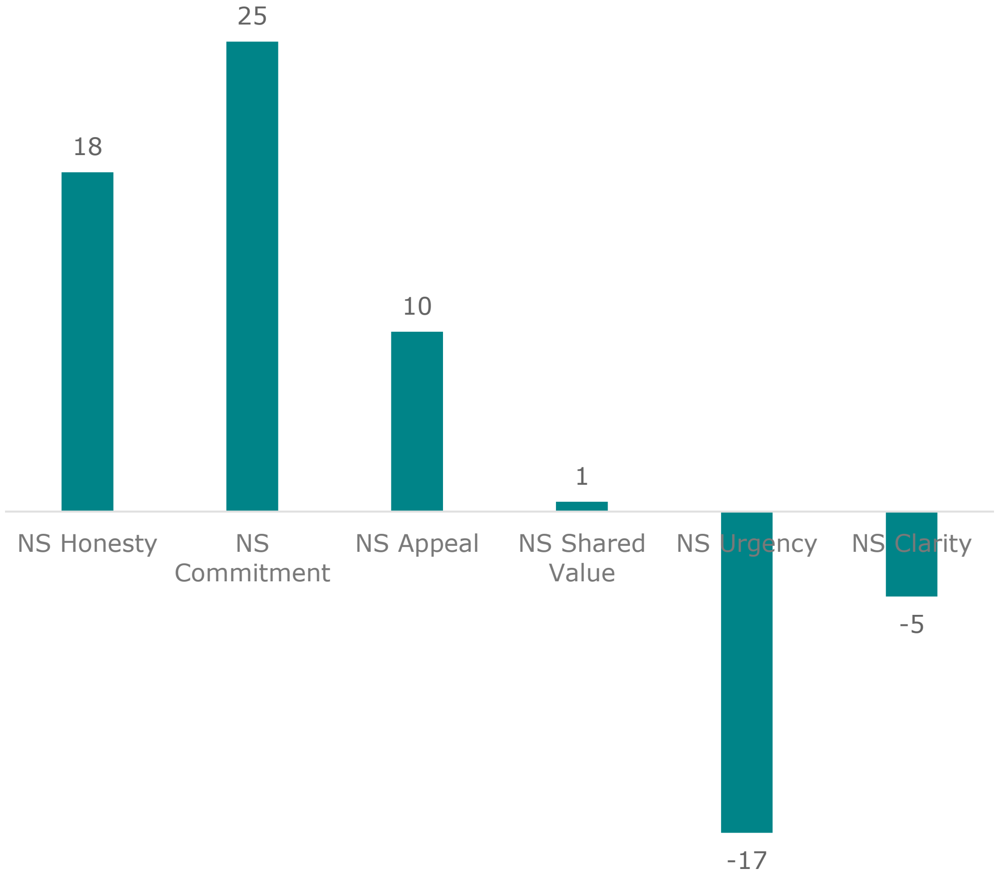
HOW ARE THE DUTCH IMPACT CAMPAIGNS SCORING ON THE DRIVERS?

Dutch impact campaigns demonstrate strategic alignment with credibility fundamentals. They score highest on the three drivers with the strongest impact on trust: Honesty (weight .380), Commitment (weight .253), and Appeal (weight .172).

Commitment receives the top score.

Conversely, campaigns score lowest on Shared Value, Urgency, and Clarity. These are drivers that contribute minimally to credibility (weights below .10). This pattern suggests campaigns have the perception of being more authentic than explanatory.

BENCHMARK ALL IMPACT CAMPAIGNS
NET SCORE ON DRIVERS



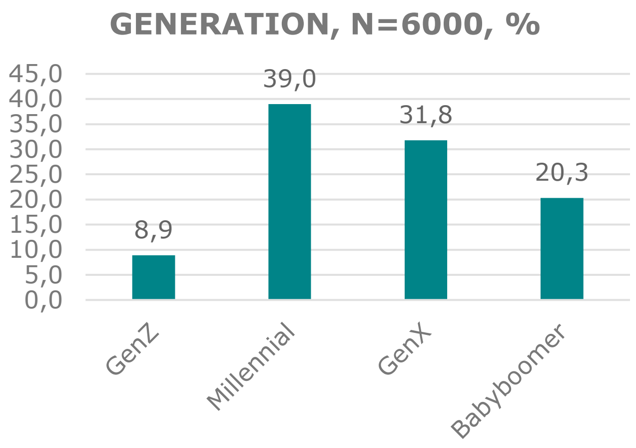
METHODOLOGY & SAMPLE

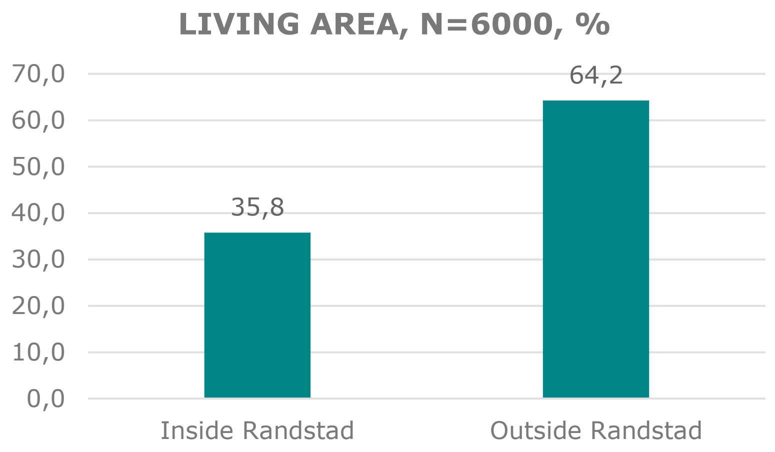
SAMPLE

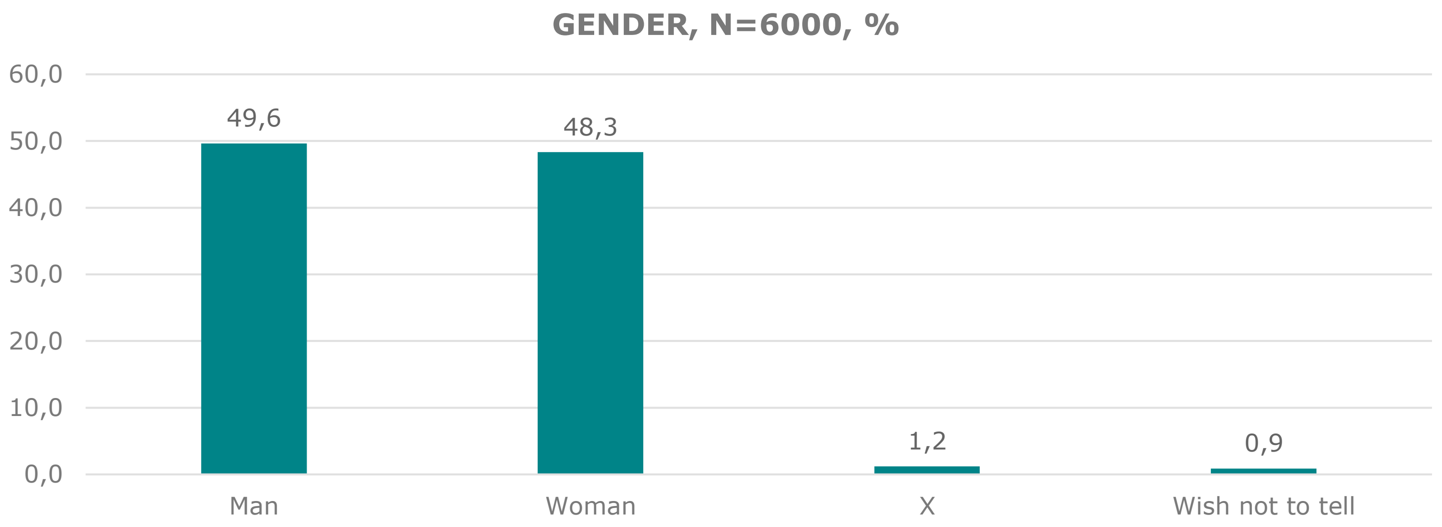
N=6.000
Weighted sample
Margin of error: 1,3%

Research Context: This indicates a statistically robust sample design with 6000 respondents, weighted to ensure population representativeness, achieving a margin of error of 1,3% at a standard 95% confidence level. Each advert has been evaluated 120 times.

Methodological Note: The 1,3% margin of error suggests high statistical precision, typically associated with 95% confidence intervals, indicating reliable population-level inferences from this sample size and weighting methodology.







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