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Turning Crisis into Opportunity:

Strategy to Grow a Sustainability Marketing Communications Unit Of Global Creative Agency

A Case Study of OgilvyEarth UK

By

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"Insanity is doing the same thing over and over again and expecting different results"

– Albert Einstein

ABSTRACT

Since sustainability concept was developed, sustainability has not been able to evolve and become a mainstream practice. OgilvyEarth (OE) aims to bridge sustainability with mainstream business but it has recently faced challenges to its business viability. The objective of this paper is to develop a strategy for OE to turnaround its business and prove the viability of sustainable business. This paper assessed and evaluated OE's strategic position based on secondary and primary data from work placement with OE. While the overall market condition is beneficial for sustainability, OE's lack of visibility and reputation and disconnection with Ogilvy network and online media result in its underperformance. The recommendations for OE are to network with Ogilvy network, improve its online media channels, attending conferences, and better CRM. The foundations are team capacity and capability restructure and becoming a thought leader. The findings and recommendation can be generalised to apply for other sustainability company to improve performances and become mainstream.

KEY WORDS

Sustainability, sustainability marketing, sustainability marketing communications, marketing communications, marcomms, mainstream, creative industry, creative agency, boutique agency, public relations, advertising, competitor analysis, perceptual mapping, organic growth, business model, marketing plan, strategy house, strategy execution

ACRONYMS

OE	OgilvyEarth
OE UK	OgilvyEarth UK, based in London
OE NY	OgilvyEarth US, based in New York
OE SF	OgilvyEarth US, based in San Francisco
OE SA	OgilvyEarth South America, based in Cape Town
OE OZ	OgilvyEarth Australia, based in Sydney
OPR	Ogilvy Public Relations
O&M	Ogilvy & Mather, the Ogilvy's advertising agency
MarComms	Marketing Communications

ACKNOWLEDGEMENT

Although I always believe in the power of one, this piece of work would have never been completed if I worked alone. The past couple of months have been one of the most labouring periods of my life and yet made me realise how much ‘love’ could help people get through all the obstacle, one after another, without getting too tired to get up and move on. I have been thinking how I can say enough ‘thank you’ on this page. Having thought too much, I now only have a few hours left before submission time. So, please let me put it this way…

Thank you Dad, Mom…for trusting me and letting me come back here again, for the endless love you have been giving, for the best understanding no matter what I do, for your smiles during the tough time and for always having time for me even though it is in the middle of the night or the early of the dawn.

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Thank you P’Adhi… for the last minute advice and for the true friendship we have had all along. I hope you like the final work I have done.

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Thank you Sally… for being the best supervisor ever. You have made my dream come true since you said yes to supervise my project. Thank you for all the Skypes, phone calls and emails, for the very sincere and straightforward feedbacks you gave, for your patience and kindness, and for supporting me until the last day of my work. I hope this work makes you smile and proud.

(It is still not perfect, but I so love it!)

"Love is the only thing you get more of by giving it away"

– *unknown*

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It is still vivid in my memory although it happened over a year ago…

On 6th August 2012, I was interviewed by one of the leading UK Study consultant firms in Thailand after being granted the ICCSR full scholarship. The first question was overarching and asking what I hope to achieve from studying the MBA in CSR. Below is what I answered:

> *"There have been proven records of how irresponsible behaviours have caused us troubles, from exploited employees, poor working condition, unfair trade to climate change. I believe that MBA CSR will help me and fellow students find way to communicate and influence the executives in business sectors to balance the responsibility towards all spheres and learn how not to care only about the profitability but also ensure the corporations responsibility for its people and environment at a larger scale" (Teerawatsakul, Quoted in Hands-on, 2012)*

These words still hold true in my mind.

CHAPTER 1: INTRODUCTION

CSR and sustainability emerged from different pasts at different times yet they share the same important future (Montiel, 2008). CSR has a longer history and originated from social concerns while sustainability or sustainable development emerged from environmental defence and debates (Loew et al, 2004). Both of the terms have many overlapping concepts which can be illustrated in Figure 1. Nicolopoulou's (2011: 525) research also states that CSR and sustainability both adopt the concept of triple bottom line representing economic, social, environmental aspects of accountability (Dahlsrud, 2006; Matten and Moon, 2005) when linking to real business practices.

However, after a number of decades, 'CSR/sustainability people' are still struggling to convince businesses to give more concerns on social and environmental impacts on the business rather than purely focusing on its financial aspect (reference). Many of both academic and non-academic attempts have been done in order to promote CSR/sustainability by linking it to back to financial gains (Business Green, 2013; Schaltegger & Lüdeke-Freund, 2013; Vij, 2013) but the movement is still not up to the speed and strength to make a radical change.

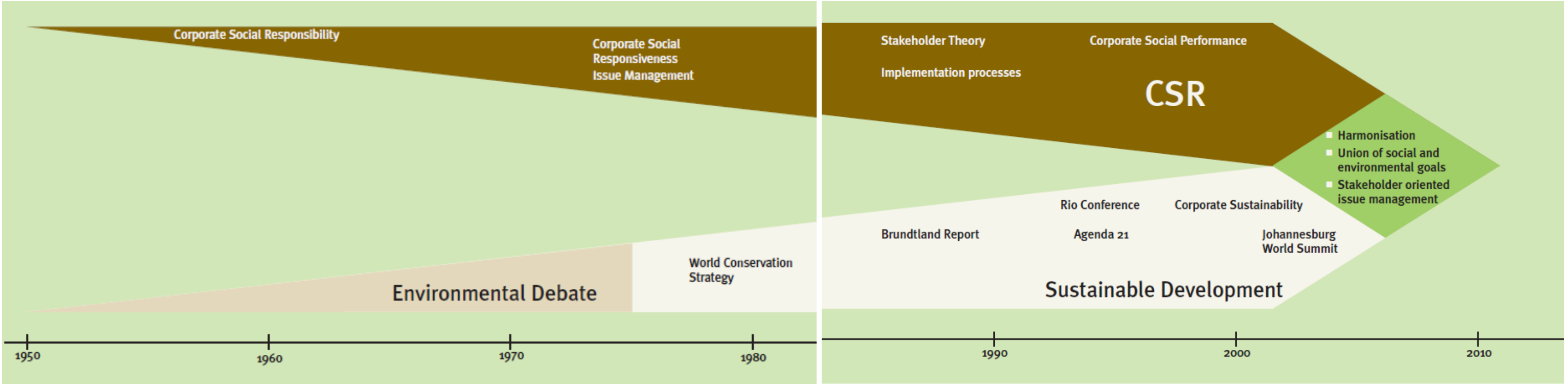
What catalyst is missing?

1.1 THE ROLE OF MNCs

During the past year, the author has observed, discussed, and attended a number of CSR/sustainability related functions in order to hear the views and exchange the ideas on how 'CSR/sustainability people' can make a change in the business world. Interestingly, the decade when strong interest in CSR began to grow also coincides with the emergence of multinational corporates (MNCs) as stated in Whelan et al (2009: 367-83) that the end of World War II gave rise to MNCs, those amongst big players shaping the world today (Cohen, 2007). This may convey the directive message that MNCs will be once again put under the spotlight and, under the growing institutional pressures, have to act or even lead on CSR and sustainability initiatives and commitments.

Who can then come to intervene and communicate between the 'CSR/sustainability people' and the MNCs or business minds?

Figure 1: Historical development of the CSR and sustainability debate (Loew et al, 2004)



1.2 OE AS THE MISSING PIECE

There seems to be the light at the end of the tunnel when OgilvyEarth (OE) was founded in 2009 as "Ogilvy's global sustainability marketing consultancy" (Ogilvy UK, 2011) and legally is a unit of Ogilvy & Mather (O&M), an advertising agency under WPP Group which is a world leader in marketing communications services, made up of leading companies in, for instance, advertising, branding, consumer insights, digital marketing, public relations and specialist communications (WPP, 2013). OE potentially has what it takes to be thriving and highly successful in the filed it was meant to be in.

First, OE has the fundamental and crucial asset to grow fast and firmly: the existing global network and client database of Ogilvy Group. Second, OE has the knowledge to know what it is talking about and to lead: the human resource with direct expertise in sustainability and marketing communications. Third, OE has what can spark and turn the 'green' boredom into an interesting subject: the creative minds.

1.3 HOW OE WAS FORMED AND TRANSFORMED

When Miles Young resumed the position of O&M CEO in 2009, he wanted to elevate the practice of O&M and hence formed the first OE in New York as a profit unit under O&M, consisting of its own team including Account People who would own and lead the projects. This means OE had its own P&L and all collaborations amongst the Ogilvy network unavoidably come with a cost. OE NY has now come to consider that they should no longer be a profit unit and only work as part of the larger Ogilvy Group (Plewako, 2013).

OE UK was also founded in 2009 as a separate business unit while the growth was created more clearly in 2011 under the lead of Kathleen Enright. Having considered the size of full-time OE team members and the budget to create visibility thus far, OE UK has done fairly well in bringing more businesses in and creating revenues, not only for its own unit but also for a broader Ogilvy network that it worked with during the past years.

1.4 THE MAIN PROBLEM AND BOARDROOM QUESTION

However, as every coin has 2 sides, OE also faces challenges, both known and unknown, resulting in its decreasing revenue since the beginning of this year. Thus, despite all the potentials it has, there is a management question of why is it not leading, standing out from the crowd, or even growing from a little seed to a big plant after its 4 years of operations.

This big boardroom question has led OE to the turning point of whether it is time to really shut down the unit to cut down the headcount and reduce operational costs or there is still a chance to turnaround its business.

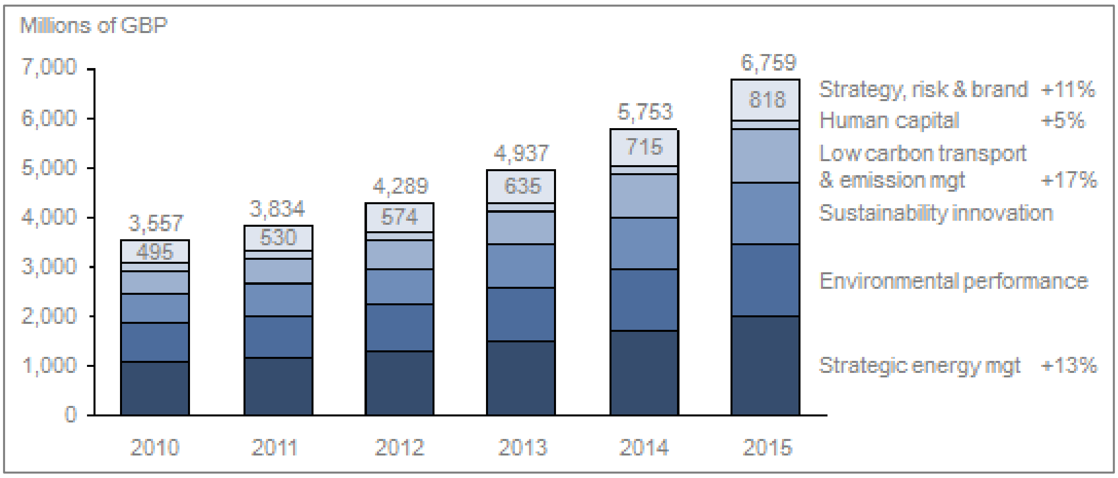
1.5 BUSINESS OPPORTUNITY FOR OE

In order to make this research more radical and practical, the focus has been put on **OE UK** in particular as it is where the author could get the best access to primary data during the Work Experience Programme with OE team from July-August 2013 at Canary Wharf office.

Verdantix (2012) forecasted sustainable business spending in UK to reach GBP6.8 billion in 2015. The CAGR between 2010-15 is 13.7 per cent p.a. The category “strategy, risk, and brand” is estimated to grow from GBP635 million in 2013 to reach GBP818 million in 2015 (See: Figure 2). The implication is, despite the economy, the growth of sustainability spending will lead to more demand for sustainable communications. As firms spend more on sustainability initiatives, they have more materials to communicate to the public and will demand more communication practices.

Given the growth opportunity, it is definitely worth a try to turnaround the business, making this little seed become a big strong plant. All OE needs now seems to be a tangible strategic planning of how to grow its revenue stream and prove itself to be a thriving business unit.

Figure 2: UK Sustainable Business Spending 2010-15 (Verdantix, 2012)



1.6 THE CENTRAL QUESTION AND SPECIFIC RESEARCH AREAS

In order to answer the central research question of ***how to grow OE UK from seed to plant***, a number of researches need to be conducted in 3 specific areas as follows:

(1) Where OE plays: Sustainability and marketing communications marketplace analysis including PEST, Porter's five forces and trends

(2) How OE plays: Situation analysis on OE in UK, San Francisco, New York, South Africa, and Australia

(3) Whom OE plays against: Analysis on 4 competitor sets in niche, public relations, advertising, and others categories

The key findings of these 3 research areas will be analysed to form the SWOT analysis, the strategy house and the strategy execution as the final deliverables of this research.

1.7 SIGNIFICANCE OF THIS RESEARCH

This research paper is of enormous significance due to 4 main reasons as follows:

(1) It will not only sustain the existence of OE but also help grow this unit with immediate to short-term plans under the overarching long-term vision to create OE's true global powerful network

(2) As a result, it will help OE assume the leading position, become a thought leader, and lead the industries, both of its own and of its clients.

(3) Coming back to the initial interest and problem, OE will then be able to help move CSR/sustainability across the border from the mysterious belief (Peattie & Crane, 2005) to the true business practices. Once the CSR/sustainability minds and the business practitioners join hands, the world will develop in a way that "meets the needs of present without compromising the ability of future generations to meet their own needs" (Bruntland Report, 1992).

(4) The final strategy can be generalised and applied to a broader environment which will enable any similar kind of business unit to strive a better and the best in class.

CHAPTER 2: METHODOLOGY AND FRAMEWORKS

To answer the central research question of '*how to grow OE UK from seed to plant'*, a combination of primary and secondary researches was conducted during the course of research. In addition, 4 main frameworks: 5Cs, PEST, Porter's five forces, and SWOT were used to guide the analysis of the key findings.

2.1 METHODOLOGY

Main methodology was the secondary research on online platforms such market reports, trade press, news, blogs, official websites and social media pages. In addition, primary research such as face-to-face meetings with various Ogilvy teams as well as WPP's sustainability manager, telephone interviews with other OE teams in the US, e-questionnaires to other OE teams in South Africa and Australia and email communications with many personnel both inside and outside of Ogilvy's office were also conducted to help interpret the secondary data as well as to give more insightful views on the OE's and its competitor's situations.

In particular, in order to come up with the key competitors in Chapter 6, rigorous online researches were done both quantitatively and qualitatively. Following is a brief detail on how each sub-section was performed.

2.1.1 Approach for OE's Direct Competitors

There were 3 stages to find out OE's key direct competitors. First, a list of online search terms was built up from personal conversations with participants during Asia-Europe Foundations Annual General Meeting in Dublin during 7-9 August 2013. There were over 30 participants from over 20 different countries in Asia and Europe including the UK. Participants were selected from different batches over the past decade where each batch represented different theme and industry. The use of this diverse group was to diversify a risk of having responses from only a few industries which might or might not include the industries of OE's potential clients. The answers are listed in Table 1.

Table 1: List of search terms to find a firm to advise on sustainability

• Sustainability Communications	• Sustainable Communications
• Sustainability Marketing	• Sustainable Marketing
• Sustainability Consultancy	• Sustainability Consultant
• Sustainability Agency	• Sustainability Campaign

Second, Google, the UK and world's most popular search engine (Search Engine, 2013), was used to search for the specific terms as listed in Table 1 to see which agencies come up on the first page. Then all the names were listed out in a matrix table to find top 10 agencies that appear on Google's first page search across the above search terms. However, as the result did not reach the aim, an additional research was done on Bing, the second most popular search tool in the UK and the world (Soames, 2012) with the same method. With the combined results from Google and Bing, there was the complete list of top 10 agencies.

Third, qualitative assessment was done in order to select only 3 key competitors to be analysed in detail in this paper. An exhaustive online reading on the media space as well as each agency's communication channels such as website, Twitter and Facebook was the main source of assessment to see, for example, who is a thought leader, gets picked up most in the news, produces award winning sustainability campaigns or has big client accounts in portfolio.

Finally, as there are also people in OE team who used to work for OE's competitors, an interview was conducted to get an insight and to help analyse the secondary data.

2.1.2 Approach for OPR's Competitors

As OE teams in San Francisco (Fernandez, 2013), South Africa (Baird, 2013) and the UK (Enright, 2013) are sitting with Ogilvy Public Relations (OPR) as well as have collaborated a number of works with this unit of Ogilvy, OPR's competitors are therefore current indirect competitor of OE, which can become its potential key competitors in the future.

Only secondary research was used in this section. To find out who the prominent players are in the public relations field, the author used ‘PRWeb’ and ‘The Brand Republic Group’ websites, consisting of BrandRepublic, campaign, MARKETING, MediaWeek, and PRWeek, as main references. The agencies were analysed qualitatively by seeing who dominates PR space the most in relation to sustainability. Then three leading agencies were picked to be analysed in more details by using their official websites and online social media platforms as main source of data.

2.1.3 Approach for O&M’s Competitors

As OE teams in New York (Fernandez & Lee, 2011), and Australia (Bell, 2013) are sitting with Ogilvy & Mather (O&M) as well as have worked together in a number of projects, O&M’s competitors are therefore current indirect competitor of OE, which can also become its potential key competitors in the future.

Only secondary data was used in this section with 3 stages to come up with the final list of O&M’s key competitors.

First, 3 advertising league tables were used as the main source of secondary data. BrandRepublic’s (2013) Top 100 League which is based on combined value of UK above-the-line advertising including online that is booked, placed and created by agencies on behalf of their client, Adbrands’ (2013) Top Advertising Agencies League which is based on estimated billings, and SpotLightIdeas’ (2013) Top 30 London Advertising Agencies helped signify who are frontrunners and can potentially be O&M’s competitors or benchmarks. The top ten agencies that appeared across the above tables were listed out for further analysis.

Second, observation and evaluation on top-ranked and awarded sustainability campaigns were done in corporation with the list of advertising agencies above. This aided the author in selecting the key competitors of O&M in terms of sustainability works to be analysed in more details by using their official websites and online social media platforms as main source of data.

2.2 FRAMEWORKS

This research paper used 4 frameworks to guide the analysis of the key findings. The overarching framework for situational analysis was 5Cs while PEST helped capture major elements in macro environment. Porter's five forces helped evaluate industry attractiveness and key players. SWOT was finally used to capture OE's competitive advantage, summarising both internal and external elements.

2.2.1 5Cs

5Cs consists of context, company, consumers, competitors and contributors (Briesemeister & Fisher, 2002). It originates from 3Cs framework proposed by Kenichi Ohmae (LACPA, 2013). The framework captures the comprehensive contextual analysis of a firm's situation. This framework was used an overarching theme to analyse OE's current situation and how it can improve its performances.

The framework fits with the central research question because each of its elements can contribute to the answers to the question which are located in different Chapters. First, the **context** was studied to understand external environments. PEST analysis was used to understand the environment of sustainability marketing communications. All context details will be discussed in Chapter 4.

With the **company**, it is important to understand the current performance, and how its strategies and resources interact with external environment to result in such performance. By learning best practices from other OE offices, OE UK can see how they build and leverage partnership to get more businesses. This directly guided the content in Chapter 5.

Then, the paper analysed potential **consumers** of OE. This was to understand the needs and preferences and what OE can adjust its value proposition and marketing mix to better attract clients. The analysis of findings will be presented in the form of perceptual mapping in Chapter 6.

In addition, by analysing benchmark companies or **competitors**, OE can understand its competitive strength and how it can become more competitive given the competitors' capabilities and product offerings. **Contributor** part helped OE identify the internal and external partners that can help generate more businesses.

2.2.2 PEST

PEST analysis suggests external environment factors that a firm should take into account when developing its business plan (Miller et al, 2011). PEST stands for political, economic, social, and technological factors. Each factor is self-explanatory and requires no further explanation. A combination of secondary research, work placement experience, and interview with OE teams has provided the information needed to complete the analysis. This is a part of context in 5Cs.

2.2.3 PORTER'S FIVE FORCE

Porter's framework is useful to evaluate the industry dynamics and how firms can capture value (Porter, 2008). The model considers five industry forces: new entrants, suppliers, customers, industry rivalry and substitutes. Given the critics on the original model, complements are added in certain cases (ul-Haq, 2009; Porter, 2001). For this research paper, the industry is defined as sustainability marketing communications. This matches OE's service offerings, project portfolios, and its competitors.

The new entrants element usually refers to how easy for new entrants to enter the market or what barriers can prevent new entrants. This is an important aspect because more players mean more competition and lower value that a firm can capture (Ward & Rivani, 2013). The paper considers new entrants as other potential sustainability and management consultants and creative agencies that can extend service offering to the same space as OE.

Suppliers control the inputs and have power over the industry. The only significant suppliers to OE are its employees and internal Ogilvy network. The employees provide the expertise and the manpower OE needs to deliver client's project. The internal Ogilvy network also acts as suppliers of business leads and manpower for OE.

Customers are the potential clients of OE. The paper analysed this along with industry rivalry when conducting competitive analysis of OE. Again, a combination of interviews and research has given insights to how much power customers and rivals have.

For substitutes, the author believes that the substitute for OE's services is from other marketing communications agencies and client's in-house marketing team. While they do not have the expertise, they have the capability to complete the sustainability communications project and can be considered as substitutes.

The paper also considered complements. This follows from the contributor part of the 5Cs framework. Complements are products or services that are more beneficial when consumed together rather than separate. For OE, sustainability and green advisory can be considered as complements. When companies purchase sustainability consultancy in order to implement sustainability programme, they naturally want to communicate. The two industries are related and can be considered as complements.

Porter's five forces framework has helped capture OE's industry competitiveness and how it can address the industry forces. Details of findings analysis will be covered in Chapter 5.

2.2.4 SWOT

SWOT analysis is another classic framework to summarise the findings. The framework categorises factors into internal and external elements and then by how they impact the company (Böhm, 2008). The internal factors are the company's strengths and weaknesses and the external factors are the company's opportunities and threats. The strength will allow OE to exploit the opportunities in the market while mitigating against weaknesses and threats. SWOT will be a basis to build the recommendations upon.

All of the 4 frameworks will be applied throughout the research paper in order to guide the analysis of the findings, especially in Chapter 4, 5 and 6. Prior to analysing the findings, the next Chapter will give set an understanding of the main core product feature of OE: Sustainability, in terms of definitions and history.

CHAPTER 3: LITERATURE REVIEW

Prior to jumping into the business quests, the research paper will set a ground understanding of OE's core product feature and its clients' segment which is sustainability. The literature review has been conducted to give an overview on definition of sustainability, history of sustainability and history of CSR.

3.1 DEFINITION OF SUSTAINABILITY

The concept of corporate sustainability emerged as corporations trying to adopt more sustainability into their businesses. Dow Jones defines this term as "a business approach that creates long-term shareholder value by embracing opportunities and managing risks deriving from economic, environmental and social developments" (DJSI, 2013). Recently, there have been a number of debates and research papers with an attempt to link sustainability practices back to financial gains and prove how running sustainable business can help companies grow and competing better (Business Green, 2013; Schaltegger & Lüdeke-Freund, 2013; Vij, 2013).

Table 2 shows different definitions of sustainability as defined by different sources ranging from formal, to semi-formal, and to informal ones. The aim is to see a wide range of how the public sphere is promoting the meaning of sustainability and to give an overview of what sustainability is prior to moving forward to the next sections.

Table 2: Definition of sustainability

Source of Definition	Definition of Sustainability
www.environment.nsw.gov.au (The Office of Environment and Heritage (OEH) in NSW)	Living within the limits of what the environment can provide, understanding the many interconnections between economy, society and the environment, and the equal distribution of resources and opportunities.
www.epa.gov (United States Environmental Protection Agency)	Creating and maintaining conditions under which humans and nature can exist in productive harmony, that permit fulfilling the social, economic and other requirements of present and future generations.

www.deq.state.or.us (Oregon Department of Environmental Quality)	Using, developing and protecting resources at a rate and in a manner that enables people to meet their current needs and also provides that future generations can meet their own needs.
www.globalfootprints.org (HEC Global Learning Centre)	"Development that meets the needs of the present without compromising the ability of future generations to meet their own needs." (Bruntland Report for the World Commission on Environment and Development, 1992)
www.sustainablecitiesinstitute.org (Sustainable Cities Institute)	"Meeting the needs of the present without compromising the ability of future generations to meet their needs" (Brundtland Report, Our Common Future, 1987)
www.sustainablecommunication.org (Institute for Sustainable Communication)	Meeting the needs of present generations without crossing irreversible thresholds that compromise the ability of future generations to do the same.
www.mckinsey.com/insights (McKinsey & Company: McKinsey Quarterly)	Sustainability is much bigger than a green strategy because it takes into account every dimension of the business environment: social, economic, and cultural, and natural. (Strategy for Sustainability: A Business Manifesto by Adam Werbach, CEO of Saatchi & Saatchi S; Harvard Business Press, July 2009)
www.cohnwolfe.com (Cohn & Wolfe)	The integrated processes that identify and manage key environmental, social and economic risks and opportunities to develop innovative solutions that will protect and create future value.
www.sustainabilitystore.com (Sustainability Store)	Taking the long-term view of how our actions affect future generations and making sure we don't deplete resources or cause pollution at rates faster than the earth is able to renew them.

www.googolpower.com (Googol Learning for Children)	Something that is good for everyone , Being nice to all of your neighbours including the trees, Like a circle- it goes around and all is re-used, Something that lasts for a long time-maybe forever
www.reference.com (Dictionary.com LLC)	A concept involving ecology, economy and society. In short a sustainability plan a plan detailing what is best for the environment, individuals, societies and economies.
http://en.wikipedia.org (Wikipedia)	Capacity to endure. Sustainability requires the reconciliation of environmental, social equity and economic demands - also referred to as the "three pillars" of sustainability.

3.2 HISTORY OF SUSTAINABILITY

Emerging environmental consciousness in 1960s is stated to be the route of sustainable development (Olsson et al, 2004) while the term sustainable development (SD) officially began in 1980 when it was used by International Union for Conservation of Nature (IUCN) in its 'World Conservation Strategy: Living Resources for Sustainable Development' report (Loew et al, 2004; Olsson et al, 2004). However, the most quoted definitions and most applied in both academic and managerial papers is the definition given in the 'Our Common Future' report published in 1987, which is commonly known as Brundtland Report, by the UN's World Commission on Environment and Development (WCED), chaired by Gro Harlem Brundtland, during her second term of running Prime Minister of Norway:

> *"Sustainable development is development that meets the needs of current generations without compromising the ability of future generations to meet their needs."* (WCED, 1987: 43)

Thanks to the Brundtland Commission, the concept of sustainability received worldwide recognition (Goethe, 2013). In addition to the above definition, sustainable development is also classically defined as the balance between three pillars: social, environmental and economic aspects (Goodland & Daly, 1996) which has become a common approach to public sector after the ratification of the United Nations and ICLEI standards in early 2007 (UNEP, 2011).

The concept became widely popular and adopted after the launch of Elkington (1999)'s book *Cannibals with forks: The triple bottom line of 21st century business*. His book is considered the evolution of sustainability issues and it gives birth to the business essential principle: triple bottom line (TBL), which he stretches to be a must for every business (Berkovics, 2010).

With the adoption of the TBL principle, sustainability is then expanded to go beyond 'green' and environmental concerns. "It is a combination of environmental stewardship, social responsibility and corporate governance – the three factors of ESG" (Brandlogic & CRD, 2012). The following section will give an overview on the history of CSR, which, as Montiel (2008) mentions, is the concept that emerged from different past but shares the same future with sustainability.

3.3 HISTORY OF CORPORATE SOCIAL RESPONSIBILITY (CSR)

While Carroll (1999: 268) states that business's concerns for society can be traced back for centuries, evidence of studies by scholars only became more obvious around 80 years ago. The earlier works such as those of Berle (1931: 1049-1074), Dodd (1932: 1145-1163), Barnard (1938), and Kreps (1940) tend to focus on social responsibility (SR) rather than corporate social responsibility (CSR). It is also worth noting for a pragmatic point of view that in 1946, as cited in Bowen (1953: 44), Fortune magazine already began to ask executives about their social responsibility.

From later researches such as those of Jenkins (2005: 525-540), Kristoffensen et al (2005), Carroll and Shabana (2010: 85-105), Rahman (2011: 166-176), and Aguinis and Glavas (2012: 932-968), it can be concluded from their findings that CSR emerge more rigorously in the second half of 20th Century, both in terms of discussion on business practices and attempts to define the term.

In an early 1950's Bowen (1953) arguably marks the beginning of modern CSR as the book states clearly that the social responsibility must reside in the business practice and therefore guides to which direction the future businesses should move forward. The beginning of 1960's, Davis (1960: 70-76) and Frederick (1960: 54-151) extend the search for real meaning of CSR and attempt to link this concept back to business executives, proposing that by being socially responsible, the corporations can expect the long-run, yet complicated, economic gain.

The research by Carroll (1999: 273) shows that 1970's is the decade when definition of CSR proliferates followed by a decade of far fewer attempts to do so. As scholars endeavour to define CSR in tremendously different ways in 1970's and as Votaw (1973) suggests, "the term [social responsibility] is a brilliant one; it means something, but not always the same thing, to everybody," it can be expected that the attempt to define this term decreases in 1980's and instead alternative themes arise (Carroll, 1999: 284). This is also accompanied by a bold statement of Friedman given to New York Times magazine on 30 September 1970 that "social responsibility of business is to create its profit," which if believed and followed, might bring back the notion of CSR as a tool to payback shareholders and cause disruption to its development to fulfil other stakeholders' expectations and benefits.

3.4 SUMMARY OF CHAPTER 3

When it comes to the matter of giving definition to an obscure or abstract term, it can be expected that the mission will take long time to complete. Sustainability and CSR definitions fall into the same development curve yet there are a few prominent ideas that lead the understanding on the terms. Although social problem gave rise to CSR while environmental concerns gave rise to sustainability, both of them tend to be referred to with the 3 pillars on society, environment, and economics. Also, with definition given by Bruntland Report, sustainability stretches its goal beyond what can be seen now as it aims to meet the needs of the next generations.

Having provided a ground understanding on sustainability and CSR, the next Chapter will discuss where OE exactly plays i.e. the sustainability marketing communications marketplace. It will start from the broad view on macro level, then scope down to industry level and finally dissect the OE's business into megatrends related to sustainability, sustainability trends, marketing communications trends and sustainability marketing communications trends.

CHAPTER 4: SUSTAINABILITY MARCOMMS MARKETPLACE (WHERE OE PLAYS)

After understanding what sustainability is and how sustainability and CSR concepts have been developed over decades, this Chapter will give a broad view of the marketplace where OE belongs by using PEST framework to capture the 4 aspects of macro environment: political, economic, social, and technological. Then it will go deeper and narrower into industry analysis using Porter's five forces to evaluate the forces in the UK sustainability marketing communications industry. In particular, it will be followed by trends outlook covering megatrends, sustainability, marketing communications, and sustainability marketing communications trends. The Chapter will end with one recent case study from O&M's Dove campaign where it put the trends in the real practice.

4.1 PEST ANALYSIS ON SUSTAINABILITY MARCOMMS

In doing any businesses, it is crucial to first understand the macro environment that it is in whether it is laws, regulations, political unrest/stabilisation, economic recession/recovery, people lifestyle, social movement, technological advancement and so on. This section will analyse the 4 aspects of PEST framework in relation to the sustainability marketing communications market environment.

4.1.1 Politics

Europe 2020 plan listed several goals that would influence sustainability. The goals span across economic, environment, and social issues such as increasing employment and reducing poverty, and increase renewable energy and energy efficiency (EC, 2010). Following the plan, public and private efforts on sustainability will flourish. This trend will be a positive for OE.

In addition, in the UK, Green Deal and Green Investment Bank are two main government initiatives to promote sustainability.

4.1.2 Economics

The UK is forecasted to have better GDP growth than most EU countries. However, its GDP has not returned to pre-2008 level and it is still in the recession along with the rest of Europe (Eurostat, n.d.) This can impact the businesses to cut spending across the board. OE may have more difficulty to find prospective clients. However, FT recently published an article reporting that firms are expected to continue its sustainability effort to maintain consumer demand and marketing work (Marsh, 2013).

Sustainability also makes more economic sense. For example, rising fuel costs and cheaper renewable energy in both relative and absolute terms influence the growth in renewable energy. Both consumers and businesses will switch to more sustainable practices because it makes more economic sense. OE will benefit from this trend. Firms that switch to more sustainable practice will assumedly want to communicate to its consumers.

4.1.3 Society

Women are having increase spending power and they are more concerned about sustainability. Women are closing the wage gaps and are entering the workforces more than ever. Their tendency to purchase goods and service with better sustainability will make the firms switch to more sustainable practices. In addition, sustainability will be a key differentiation for products and services. Hence, the demand for sustainability communication will increase.

Talent crunch and employee empowerment will boost corporate spending on employee benefits. Companies will want to have internal communication to keep their employees informed as well as external promotions to attract new talents. This is another opportunity for OE.

According to a recent article, consumer’s green spending is resilient in the economic downturn. (Living Green, 2012) Consumer’s concern over sustainability has become a growing trend that even Coca-Cola CEO mentioned in the BBC article (Kent, 2012).

4.1.4 Technology

Renewable energy technology is cheaper both in terms of investment and operating costs. This will enable more companies and consumers to afford and adopt the technology. The companies can use this as differentiation point for their products and will demand more sustainability communications.

Social media allow people to communicate and monitor corporate action. Internet is the most popular media for green marketing. OE can therefore focus on internet and social network to gain more clients.

In sum, from PEST analysis, the macro environment is giving a favourable signal for OE’s growth in the coming years. A short summary on PEST analysis can be found in Figure 3.

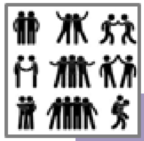
Figure 3: PEST Analysis on Macro Sustainability & Marketing Communications Environment

Political

- Europe 2020 plan outlines sustainability goals to achieve, resulting in more sustainability projects that can be communicated
- Green Deal and Green Investment Bank from UK government will further promote sustainability initiatives

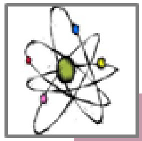
Economy

- Economic downturn has tightened firm budgets. Sustainability spending is negatively impacted
- The downturn also justified more sustainability projects such as renewable energy, leading to more material to communicate to customers



Society

- Women are more concerned about sustainability and have increasing spending power
- Competitions for talents force firms to communicate sustainability to its employees and potentials
- Tone from the top and alignment with CFO are essential to achieve sustainability projects



Technology

- Advancement in green technology makes it more affordable and widespread
- Social network enables customers to monitor company's performance and transparency, and communicate about sustainability
- Creative work and campaigns are competing on speed and mixed media

4.2 FIVE FORCES IN SUSTAINABILITY MARCOMMS INDUSTRY

Porter's five forces framework is useful to evaluate the industry dynamics and to summarise the findings on industry competitiveness. Each force is classified as having low, moderate or high power over the industry. This section will look at the forces in the UK sustainability marketing communications industry.

4.2.1 Suppliers

The employees have moderate power over the industry. Without employee, an agency cannot fulfil its project. There are many agencies in the marketing communications industry yet quite a limited number specialising in sustainability. Hence, the employees may find it moderately hard to switch between agencies. There is no barrier for employees to switch, though, except corporate culture and connections. However, there are fewer positions in sustainability than candidates. The industry can also hire new employees to fill in vacant positions quite easily. The switching costs for employees to move to another industry are significantly higher. They have to develop new skills and face tougher competitions from other candidates who have more relevant experiences. These factors weigh the negotiation power to the hands of the agency and balance the employee's importance and movement.

Another type of suppliers is the business leads. Although the industry can conduct business development in-house, referrals are important sources of revenue. They usually have more client awareness compared to the industry. The lead suppliers are restricted to give business leads to the players that they trust. Their reputation and trustworthiness are at stake if they give the lead to a bad player or poor substitutes. Their power over the industry is also moderate.

4.2.2 Buyers/Clients

The clients have moderate power over the industry. Given the current trend in sustainability, more agencies as well as their clients' companies are establishing sustainability programmes to take advantage of the trend. To realise their returns on sustainability investment, the companies will need to communicate their efforts to their customers (Ward & Rivani, 2013). This implies more demand for sustainability communications expertise. The industry has the expertise that the clients do not have. While substitutes exist, they are not of the same quality. However, the niche nature of the industry is the barrier because the clients have low awareness of the expertise of this industry.

In addition, the clients may wish to stay with their sustainability consultants for communication advices rather than procuring new communication agencies, which they do not have clear idea how to evaluate (Sicoravit, 2013). The contracting and switching costs are relatively high for the clients. The industry also has high fixed costs in terms of salary, office rents, and administrative costs, and must compete for revenue. Thus, the buyers have moderate power on sustainability marketing communications industry.

4.2.3 Substitutes

The power of substitute is moderate. Substitutes for this industry are internal marketing team and regular marketing communications agencies. While these substitutes can develop a communication campaign for sustainability communications, they do not have the same expertise. However, switching from substitutes to the industry can have switching and procurement costs for the clients. Also, the substitutes, which are more mainstream and established, can develop relationships with marketing departments. They can crowd out the industry by expanding their existing role to sustainability communications.

Another type of substitutes is the sustainability consultant firms. They usually advise companies on sustainability issues and they can extend their services to sustainability communications. Again, they do not have the expertise but it is more convenient and is also a matter of long-term trust for the clients to contract with one consultant firm (Sicoravit, 2013).

4.2.4 New entrants

The threats of new entrants are low. Logistically and financially, it is easy to enter the industry. A few sustainability communications consultants can join forces and enter the industry. They can even work from a coffee shop and advertise themselves through online media. Given the creative nature of the industry, the product differentiation can be achieved fairly easily because each person has different creativity. There is also not much the incumbents can do in order to retaliate the new entrants. However, credibility and brand, which are the key elements of this industry, cannot be obtained as easily. This is the biggest obstacle that the new entrants have to face because the buyers will prefer reputable existing players to new entrants. The collective knowledge and experiences that the incumbents have accumulate over time cannot be replicated easily as well. The depth and breadth of services of incumbents also give the competitive edge over new entrants. Therefore, new entrants will face tough competition even they can enter the industry relatively easily.

4.2.5 Industry rivalry

The industry rivalry is moderate within sustainability marketing communications. First, the industry has high fixed costs. Every player must compete for revenue to cover the expenses. Switching costs between players are not significant. The clients can call another player and give them the brief. However, the services are differentiated across players in terms of their expertise, capability, and approach. The clients can choose the players that match their needs as well as their budget.

4.2.6 Complements

Complements of sustainability marketing communications are sustainability consulting and marketing services. The industry cannot exist without the sustainability consulting because the clients need to have sustainability projects to communicate first. Sustainability consulting acts as a gate keeper and sustainability marketing communications can only follow. In addition, sustainability consulting can create stickiness. Switching and coordinating between sustainability consulting and sustainability communications can incur costs to the clients. Thus, the consulting part has high power over the industry.

Another complement is the marketing service. While sustainability communications develops the campaign conceptualisation and strategy, it has to execute via a traditional marketing services company. The marketing service can help procure media channels and the execution of the communications campaign. The media channel they have can be crucial to the communication campaign. However, they do not have high power over the industry. There are many marketing service companies to choose from and switching or procuring costs are relatively low. While there is a level of differentiation between each marketing service companies in terms of media offering and quality of media, the differences are not significant enough. Their power is moderate.

4.2.7 Summary of Porter's Five Forces

From Porter's five forces analysis, the sustainability marketing communications industry is moderately competitive. The industry forces are moderate except threats from new entrants and complements. Threats from new entrants are low due to the brand and reputation building. Complements have strong power because sustainability consulting has the first mover advantage to interact with potential clients before the clients move along to sustainability marketing communications.

First, OE can leverage its connection with Ogilvy and its expertise to offer a full package of solutions. While OE has not been regarded as the thought leader in the industry yet, it has the capability to offer sustainability consulting. By becoming a gatekeeper itself, OE can control the flow of subsequent complement services and lock in its clients. It affiliation with Ogilvy can be beneficial for clients who need marketing solutions as well. This move can reduce the power of complements and customers. It also creates significant competitive edge over the competitors who do not have the capability to offer sustainability consulting and reduces the rivals' power.

The next action is to build its reputation and expertise in the industry. To compete with industry rivalry and prevent new entrants, OE has to become a go-to expert in the industry. This can build awareness for the client and reduce the client's search costs and reinforce the competitiveness. The reputation and expertise can also create barrier for new entrants who cannot replicate the same reputation and expertise.

4.3 TREND OUTLOOK

This section will discuss about megatrends, then scope down into sustainability trends and marketing communications trends. Having attempted to see the overlapping areas between the above trends, this section will end with sustainability marketing communications trends and practices which is the area most relevant to OE's interest and business.

4.3.1 Megatrends

Companies that can spot the megatrends before their rivals and take leadership position will tackle the megatrends strategically and therefore gain great competitive advantages (Hardyman, 2013; Singh, 2013).

This has been the case for phenomenally fast growing companies during the past decade like Facebook, IBM and Amazon (Singh, 2013). Emerging during the early boom of online social network period (Curtis, 2013; Goble, 2012), Facebook has built up its realm from a Harvard student exclusive network to USD2.74 billion post IPO evaluation (Crunchbase, 2013) or over USD63 billion market capitalisation in July 2013 (YCHARTS, 2013) as the world leading social network platform. IBM has spotted the service trends and changed its focus from hardware business to solution provider. Their clients include but are not limited to BBC, Shell, the MoD, United Utilities, and ExxonMobil (IBM, 2013a; Mishra, 2009). Amazon, although has been well known for its online retailing, has also moved onto hardware serving e-book i.e. its Kindle and then onto the cloud trend by introducing its cloud data-storage solutions (Amazon, 2013).

From these examples, it can be noticed that that technology and service are among the rising megatrends. Therefore the next question is what are the other "global, sustained and macroeconomic forces of development" (Frost & Sullivan, 2013) that will impact business, economy, society, culture and personal lives in the coming decade, especially those that are related to OE's business.

From an extensive research (e.g. Hardyman, 2013; Lanaha, 2013a; Lanaha, 2013b; Singh, 2013; Watson, 2011; and Wile, 2012), it has been found that a number of megatrends can be related to sustainability and/or the opportunity for OE UK in the coming years. These include but not limited to the list shown in Table 3.

Table 3: Sustainability-Related Megatrends

• New technology	• Smart initiatives	• Transparency via social media
• Zero emission	• Limited resources	• Outsourced specialised services
• More women-to-men ratio/power of woman	• Growing middle class/power of the mass especially in India and China, two of the BRIC countries	• Value for money

4.3.2 Sustainability Trends

Following the megatrend in technology, the online search is put in place in order to find the sustainability trends. The author uses Google Trends (2013) as the tool, as it captures all the searches done across all Google platforms which is the most used search engine (Search Engine, 2013; Soemes, 2012), to find out what terms are most commonly used with respect to the search on sustainability. This will notify OE of the term(s) it should employ in its web content and perhaps also suggest the reason why OE does not come up in the online search.

By putting 'sustainability budget, sustainability marketing, sustainability communication, sustainability communications, sustainability trends, sustainability practice, and , sustainability practices' in the Google Trends, it shows that the global audiences use 'sustainability marketing,' followed by 'sustainability practices' more than other terms. If the focus is put on only UK platform, the top search still falls upon "sustainability marketing" followed by "sustainability practice." In addition, the extended index shows that sustainability definition and reason for sustainability are today's most glowing interest with over 250 per cent rise. It signifies that people are still confused by what the term really means and how being sustainable can help them. This gives opportunities for OE to present more thought leaderships in response to these quests.

From an exhaustive research on which sustainability trends are currently rising (e.g. Enochs, 2012; Growstone, 2012; Hincha-Ownby, 2013; McIntire, 2013; Sustainability at Work, 2013; Tidwell, 2013), there are total 9 trends that repetitively reappear (See: Table 4).

Table 4: Sustainability Trends

• Tone from the top	• More transparent sustainability reporting	• Responsible supply chains
• More engagement with CFOs needed	• Big corporations and women as economic drivers	• Resource scarcity especially water
• Employees, customers and investors as key stakeholders	• Environment-related issues esp. Climate change and carbon emission	• Attempt to define sustainability

At the Sustainable Brands® 7th annual community gathering on 3-6 June 2013 in San Diego, CA, Cynthia Figge (2013), co-founder of CSRHub, gives a closing note that we are now “at the edge of a big shift” after her positive comments on the most recent findings that there is in fact an enormous return on investment (ROI) for sustainability. Her statement is in agreement with Murry (2013), CSO at global reporting platform Ecodesk, who believes that businesses can save substantially with an understanding of energy consumption and carbon emissions within the supply chain.

In addition, in more recent research (Aspey, 2012), sustainability has been proven beneficial to a company’s performance and therefore high sustainability company delivers a better share price and accounting profit in the long term. To be more specific, the return on sustainability is more pronounce in industries where customers are individuals; firms are competing on brands and reputations; and products depend on natural resources (Eccles et al, 2013). Verdantix (2012) estimates the size of UK sustainability business to be GBP6.6 billion in 2012 with annual growth rate of 14 per cent in 2010-15 with more companies increasing their spending on sustainability to build their reputations.

CEO survey reveals 93 per cent of CEOs think sustainability is important to the future success of their business (Accenture, 2010). Furthermore, 72 per cent identifie brand, trust, and reputation as one of their top three factors for sustainability. The result is in line, although with much lower percentage, with the global survey done by Satkiewicz (2012) on

250 heads of sustainability. His results show that 72 per cent of responding firms have a sustainability leader reporting into the executive committee, 21 per cent of CEOs view sustainability as the issue that has already impacted their quarterly and annual financial performance and the biggest investment will be put on sustainability innovation, marketing and employee engagement.

However, despite several major positive trends, there are setbacks that can affect OE. The benefit of sustainability marketing is still questionable. Stricter regulations in the EU may imply that companies are spending more on sustainability to meet the regulations rather than to build brands (EC, 2013; JNCC, 2011). In addition, consumers rely more on peer review and vigilance rather than marketing campaign. D'Arjuzon (2013) also finds that the current pressure is not much enough to push any immediate change of action or to make CFOs approve more budget on sustainability. To support this, Metcalfe, Verdantix CEO suggests that to achieve their ambitious plans, heads of sustainability must learn to speak the CFOs' language (Hobbs, 2012) otherwise their sustainability projects can go nowhere.

4.3.3 Marketing Communications Trends

Being in line with a megatrend, technology, digital, mobile and social media platform is the theme that also come up in marketing communications in general and is the most popular trend thus far. Although there has been a recent radical and interesting article written by Watson (2013) suggesting the new trend that teens are leaving the big social space and creating their own private circle of social network, Conlon (2013)'s statistics on personalisation trend show that big social networks like Facebook and Twitter are still of great use for the companies to attract new talents and marketers to communicate with their customers (Bhattacharyya, 2013; eBiz, 2013; Tode, 2013; Wasserman, 2011).

For instance, on 16 July 2013, BBC launched the news with headline: “Vatican offers 'time off purgatory' to followers of Pope Francis tweets” (Kington, 2013). This is another radical affirmation that even the spiritual part of the world is now moving towards online social media, seeing and using it as a crucial marketing tool to connect with the followers. "What really counts is that the tweets the Pope sends from Brazil or the photos of the Catholic World Youth Day that go up on Pinterest produce authentic spiritual fruit in the hearts of everyone," said Celli (Quoted in Kington, 2013).

The above trend can go very well with other rising trends such as speed, real time communications, short video clips, visual/good design, better content, (e.g. Fletcher, 2013; Melchers, 2013; Mitchel, 2013; Taft, 2013; Wagner, 2013) and ‘SoLoMo’ (Lyle, 2013) which stands for Social, Local and Mobile. These can be primarily concluded with the multichannel, mixed media and Integrated Marketing Communications (IMC) trend. Interestingly, there are a number of marketing communications trends that overlap with the mega and sustainability trends such as smart new greens, technology, big data, and transparency. IBM is a good example. Fundamentally, IBM is a top technology company and they have ridden with a recent megatrend to offer services/solutions instead of pure hardware and it is currently claiming that “at IBM, big data is about the ‘the art of the possible.’ The company is certainly a leader in this space” (IBM, 2013b).

Late 2012, HubSpot has combined the top ten most memorable campaigns of the year. Many of them have reconfirmed the effective use of technology, social media, short video clips, connecting with audiences by emotions and big global news such as Olympic and Election, and transparency including what happens behind the success scene such as ‘Raising an Olympian’ series by Proctor & Gamble (P&G). Each video of such series received closed to 1 million views and the main campaign ‘Thank You, Mom’ received 53 million views by December 2012 (Sprung, 2012). It could be observed that news which has been presented and reported at the global level would already pave the way for marketers. The remaining task for them is therefore to spot the trend, create marketing work and ride with the trend.

Another observation is there is no right or wrong answer on whether the brand can create something very far from what they do or directly connected to their product as long as they "stay true to the lifestyle of their brand" (Sprung, 2012). Red Bull's 'Stratos Jump' and TNT's 'Push to Add Drama' definitely replicate their own taglines: 'Red Bull gives you wings' and 'We know drama' respectively while P&G's 'Thank You, Mom' uses sport yet focuses on how the Olympians have been raised and appreciation and cerebration of the importance of Mom which signifies the lifestyle and the nature of its target audience.

In terms of trend in brand experience, both Red Bull and TNT have done it so well especially Red Bull who has created the hugely scalable advocacy which DachisGroup (2012) has indicated as the best way to create purchase intent these days for brand marketers. It is also interesting to look at the number of people sharing the page itself. The most popular means, which doubles the runner ups, is Twitter with 1,199 tweets compared to 680 Shares on LinkedIn, 643 Likes on Facebook and only 113 clicks on Google+.

On the other side of the coin, the online social media, aside from being used by the companies to promote and communicate their good wills, it is also the tool to attack the ill-behaving companies with the massive result. Keane from Econsultancy (2010) has commented on his article that Nestlé has learned its Social Media lesson in the hard way after Greenpeace ruthless campaign on KitKat's Orang-utans. The company obviously did not handle the situation well by deleting the post on Facebook and trying to suppress the public view on this matter. Finally Greenpeace advert reached nearly 1.5 million views and won the case.

Table 5 summarises the marketing communications trends that can be relevant to and beneficial for OE. Then the next section will discuss more specifically on the sustainability marketing communications trends and practices which relates directly to OE's business

Table 5: Marketing Communications Trends

• Speed, real time	• Short video clips, Social Media	• Visual, good design
• Technology, smart new greens	• Big data, big global news	• Better content
• SoLoMo (Social Local Mobile)	• Transparency	• Multi-channels, IMC (Integrated Marketing Communications)
• Lifestyle	• Emotion	• Brand experience

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4.3.4 Sustainability Marketing Communications Trends

As quoted by Environmental Leader website, Cone Communications Corporate Social Return Trend Tracker completed in 2012 has now reminded us how important it is for corporates to 'communicate' with the customer, who is one of the most important stakeholders, about what they have done responsibly. The figure shows that 82 per cent of consumers are more likely to purchase a product that clearly communicates the results of Social Corporate Responsibility (CSR) than one that does not and 40 per cent go as far as not purchasing the products at all if the company fails to communicate its CSR results (EnvironmentalLeader, 2012).

Another survey by Cone Communications on 1,000 adults reveals that 69 per cent of the samples think it is okay if a company is not environmentally perfect as long as they are honest and as many as 78 per cent will even boycott a product if they discover its environmental claims to be misleading (Hamed, 2013).

A trend worth noting is view from the top which appears in both sustainability trends and sustainability marketing communications trends (Deri et al, 2007). Accenture's 2010 report shows that 93 per cent of CEOs believe that the future success of their business relies partly and significantly on the sustainability while 91 per cent of CEOs report that over the next five years, their companies will employ new technologies to address the sustainability issues. In addition, CEOs have been complaining that the investors do not give much value to their companies' sustainability initiatives yet Edemir Pinto sees the problem lies in the lack of efficient communications between the company and its investors (Quoted in Accenture, 2010)

Other than that, the common trends that come up on sustainability marketing communications are transparency and trust, visualisation and designs, stories and emotions, engagement, difference, optimism, relevancy to the brand's image or corporate's core competencies, and measurable results such as Balanced Scorecard and Sustainability Rating (e.g. Curve, 2013; Futerra, 2013a; Hicks, 2013; Johnson, 2013; Gould, 2013; Maxwell, 2013; Parguel et al, 2011; Schwing, 2013; and Wicinski & Griffith, 2013). At Ogilvy Public Relations (OPR) in the UK, the emphasis is put on stories, emotions and visualisation. As Chris Graves (Global CEO) stated on 4 July 2013, "without our emotions, we are unable to reason" and at the presentation training on 5 July 2013, Michael Frohlich (Managing Director) repeated many times that stories are remembered, not fact, and pictures would help engage imagination and emotions of the audience.

Lastly, the trend that appears across three platforms is 'fun' (Gamification, 2013; Rudell, 2013; thefuntheory, 2013). Although it does not come up repetitively by this research; it is by far one of the most important elements in life as it keeps reappearing and being discussed in many other fields such as having fun at workplace to make career more engaged (Rau-Foster, 2000; Veeck & Williams, 2005), having fun in life to be healthier (Zapanta, 2010) and having fun to be successful as highlighted by Forbes (Culberson, 2012).

A good example to illustrate this is Rainforest Alliance's 'Follow the Frog' TVC by Wander Agency in LA (Epica, 2012). It gives so many interesting remarks that replicate the megatrends, sustainability and marketing communications trends such as using the short clip, having well-scripted content, being a clear call for action, engaging with everyday life, integrating website with the YouTube video and "as it's weaved into a humorous narrative the message has a far greater impact" (nice&serious, 2012). It is also now sitting in TED list as an Ad worth spreading (TED, 2013).

Table 6 summarises sustainability marketing communications trends that OE can take forward into its future practices.

Table 6: Sustainability Marketing Communications Trends

• View from the top	• New technology	• Transparency and trust
• Visualisation and design	• Difference	• Stories and emotions
• Brand's image	• Optimism	• Engagement

4.4 CASE STUDY FROM O&M

From a meeting with Fiona Battersby (Head of TV Administration), Maja McIntosh (TV Producer) and Sacha Leyland (Business Director) at O&M on 18 July 2013, it shows that their recent work on Unilever's Dove Women Compressed Aerosol Original Deodorant 75ml illustrates well of the above trends. In order not to produce any carbon footprint, they first went around the office by foot to look for the new models. Some were given the free product sample with the commitment to come back to return the product and provide truthful comments on how they felt.

These activities form much engagement from real customers in real time and also after they launched the ad. Normal women feel more connected to the normal women in the ad. In addition, one of the top two comments from the interviewed customers was that they would definitely buy it because it is environmentally friendly. This compressed product got their emotion right away and also gives the hard data such as how many percentage of carbon reduction if the customer changes from the big bottle to the compressed version. Besides, O&M found that addressing what the customers might doubt (i.e. whether the small one will last as long) worked tremendously well in their marketing and in making sure that the gap between green intention and purchasing action is effectively reduced.

4.5 SUMMARY FOR CHAPTER 4

Not knowing the environment that the company is playing in is like walking in the darkness without direction. This Chapter has given the overview from macro environment down to industry level and the insight of each trend that revolves around OE's business. From the analysis of the findings, it can be concluded that there is a huge opportunity for OE to grow and become stronger in the market. Many proofs have shown that more business will have more budgets for sustainability development, hence a higher need to communicate. Customers, employees and investors are the key stakeholders who will require more transparency from the company and; therefore, put force upon better communications on CSR and sustainability activities. The advancement of technology will make it easier for the stakeholders to access any data and also for OE to take the advantage of the low cost and real time communication to gain higher awareness within a shorter timeframe. View from the top and speaking the same language as CFO's are something that OE can take in mind as the way to go for new business as well as to help its client gain more sustainability budget.

Being equipped with the knowledge of where OE plays at the macro environment and industry levels as well as the beneficial trends, Chapter 5 will discuss about how OE UK currently plays in the market in relation to other OE offices, followed by Chapter 6 which will then discuss about OE's competitors in more details.

CHAPTER 5: SITUATION ANALYSIS (HOW OE PLAYS)

This Chapter will focus on the current practice of OE in the UK and compare its practice to other OE offices to see what it is doing comparatively well, what it could have done better, and what it can learn from other OE's. This Chapter will start with public view on OE followed by analysis on OE UK's current business model and clients, then comparison between all existing OE's offices in terms of marketing, HR and operations, and finance dimensions.

5.1 PUBLIC VIEW ON OE

Prior to analysing what OE UK's current business practice and to compare its performances against other OE's, this section will set out the tone and expectation of what OE is meant to be and how it was launched 4 years ago. Then, the research findings on how OE currently appears in the public space will be the contrasting point which signifies the gap that OE should aim to close before it dilutes any more image and reputation of the agency. However, given the ambitious aim and the support from the management team during the launch, OE can positively bring back the vibe and revive even more strongly.

5.1.1 The Launch

From Table 7 below, it is clear that OE was originally set up with high expectation to present in 30 countries, to be the one-stop-service pool of agency talents, using sustainability as the selling magnet. It was also expected to tab into consultant industry and compete in specialty field of sustainability. Also, it remains the strong voice of marketers by raising the bar above the usual and arguably limited 'green' marketing as sustainability also touches social and cultural aspects as defined by OE.

Table 7: What OgilvyEarth was said to be at the time of the launch

Article Date	Source	What said
26 May	http://cause-encounters.blogsp	Ogilvy and Mather, the advertising, marketing and PR group, is set to launch a new unit, Ogilvy Earth, which will

2009	ot.co.uk/2009/05/ogilvy-launches-ogilvy-earth.html	be based in 30 offices around the world and focus on issues relating to sustainability, as its seeks to move beyond its current role and become a "business accelerator".
26 May 2009	http://www.campaignlive.co.uk/news/908107/	OgilvyEarth is Miles Young's attempt to move into territory occupied by management consultants and follows Havas Media's recent launch of a similar service.
27 May 2009	http://www.mediabistro.com/mediajobsdaily/ogilvy-mather-launches-ogilvyearth_b690	Miles Young called it "a strategic move to unite all our work under one roof in order to present a holistic approach, share lessons-learned and make it easier for clients to access our expertise."
28 May 2009	http://www.bulldogreporter.com/dailydog/article/ogilvy-mather-worldwide-launch-ogilvyearth	Ogilvy & Mather Worldwide has announced the expansion of its global sustainability practice, unifying its multiple offerings into a new entity — OgilvyEarth — the first global, cross discipline practice created to help businesses deal with the communications of sustainability as they move beyond "green marketing."
3 June 2009	http://www.ogilvy.co.uk/page/32/?p=ojod	Ogilvy & Mather Worldwide, the parent of Ogilvy Group UK, has launched a new "global sustainability" business called OgilvyEarth. Announced in the *Financial Times* last week, we believe it is the first international, cross discipline practice created to assist businesses with the – now fundamental – issue of sustainability.
10 March 2011	http://www.ogilvy.co.uk/page/9/?p=yvfe	Ogilvy Group UK is this week delighted to formally announce the appointment of Kathleen Enright as the first UK practice head of OgilvyEarth, Ogilvy's global sustainability marketing consultancy.
28 June 2011	http://www.ogilvy.com/News/Press-Releases/June-2011-Kim-Slicklein-Named-President-of-OgilvyEarth.aspx	Veteran sustainability marketing executive Kim Slicklein is joining OgilvyEarth as President of its integrated global sustainability practice. She replaces Seth Farbman, who has joined Ogilvy client GAP as Chief Marketing Officer.

5.1.2 The Current Messages

OE's own communication channels are website, bloc, Twitter, Facebook, LinkedIn, and YouTube. The main website (.com) chooses not to present itself in the traditional way by omitting 'who we are / what we do' and go straight into 'what we believe.' The closest part that can help visitors understand its business would be 'our network' which describes how it works. Its Australian website simplifies and productises its explanation which makes it easier for the visitors to see and understand at first glance of what OE is. However, it narrows down its offerings to be specialist in community and environment.

Having left the sustainability issues alone, OE does not seem to be able to keep up-to-date with online communications with its stakeholders (See: Table 8). While the Australian website says that we are now entering the Age of Stakeholders, its last news post was since 2012 and there are only 4 blogs on website this year, 2 of which are the hellos from its new interns. The last blog on OE South Africa was also posted in 2012. In addition, while there is an option for visitors to "subscribe to the OgilvyEarth observer" (OgilvyEarth, 2013) in order to receive newsletter or email communications from OE, there has never been a response or a single letter sent from OE. This can potentially harm the image of OE and in a way contrasts with the nature of the target market that requires real-time communication and high engagement with key stakeholders.

If OE can first fix its virtual appearance to be more active and show by example of how effective communications is, it will be strategically rightful to remain the hub of Ogilvy talents. OE, aside from only spelling out the names of other Ogilvy's, it can build up credentials e.g. awards that each agency receives, big clients or great success stories of each or some agencies, etc. The more they become known and accredited, the more OE will be trusted in return. On the other hand, if OE is seen withering, it is very risky and fool for Ogilvy Group to be closely linked to OE. The strong internal partnership shall remain in order to grow and foster, not to harm one another. OE definitely has a potential and capability to revive. It only needs a simple and tangible plan.

Table 8: How OgilvyEarth defines itself in different platforms

Country	Source	What said
Global/ USA	http://www.ogilvyearth.com/	**Web: Our network** OgilvyEarth is a mash-up of forward thinkers and sustainability marketing experts from around the Ogilvy network across five continents, including our brightest minds in planning, consulting and creative from Ogilvy & Mather, OgilvyOne, Ogilvy Public Relations, OgilvyAction and OgilvyEntertainment.
Australia	http://ogilvyearth.com.au/	**Web: Who we are** We are the specialist community and environment practice of Asia-Pacific's largest communications agency. We help companies, NGOs and governments raise awareness and generate action on community engagement and environmental sustainability. We run campaigns, engage employees and stakeholders and build effective Corporate Social Responsibility (CSR) programs.
South Africa	http://www.ogilvyearth.co.za/	**Web: What we do** We create specialised sustainability communication based on a strategic model. The Ogilvyearth tool set enables brands to explore their positioning within the sustainability arena and identify key opportunities for growth and innovation.
Global/ USA	https://twitter.com/OgilvyEarth	**Twitter: Profile** OgilvyEarth partners with brands to use sustainability to drive brand value, achieve long-term growth and increase profits. 2,715 Followers. 832 Tweets. (14 August 2013)
Australia	https://twitter.com/OgilvyEarthOZ	**Twitter: Profile** We are Australia's leading sustainability communication practice. We bring together the art & science of effective communication to influence a better world. 25 Followers. 1 Tweet. (14 August 2013)

UK	https://twitter.com/OgilvyEarth_UK	**Twitter: Profile** Moving sustainability from niche to normal and tweeting stuff that inspires us. 600 Followers. 506 Tweets. (14 August 2013)
South Africa	https://twitter.com/OgilvyEarthSA	**Twitter: Profile** Ogilvy Earth - strategically assisting brands to become sustainable champions. 611 Followers. 786 Tweets. (14 August 2013)
Global/ USA	https://www.facebook.com/OgilvyEarth?fref=ts	**Facebook: About** We believe sustainability is the growth opportunity of the 21st century, but it's not just about being green. It's about rethinking how the world works and finding smarter ways to do the simple actions that make up our daily lives. 1,495 likes. 6 talking about this (14 August 2013)
Global/ USA	http://www.linkedin.com/company/ogilvyearth?trk=top_nav_home	**LinkedIn: About OgilvyEarth** We believe sustainability is the growth opportunity of the 21st century, but it's not just about being green. It's about rethinking how the world works and finding smarter ways to do the simple actions that make up our daily lives. *Industry: Environmental Services* *Type: Public Company* *Company Size: 51-200 employees*
Australia	http://www.linkedin.com/company/ogilvy-earth?trk=top_nav_home	**LinkedIn: About Ogilvy Earth** OgilvyEarth is a holistic sustainability communications practice – from empowering employees to act for the environment to promoting sustainable products to advising on environmental public policy. *Industry: Public Relations and Communications* *Type: Privately Held* *Company Size: 1-10 employees*
UK	YouTube	No description on 'About' section and only 3 video clips uploaded in 2012. 2 subscribers. 2,546 views.

From the landscape analysis of OE network, it perhaps already answers why the growth of OE has been slow. It seriously lacks visibility in the market. Therefore, as an immediate plan and to maximise what OE has at hand, it should definitely leverage Ogilvy network and grow its business from internal connections. It is, however, noticeable that its YouTube has quite a good number of views, hence, OE can also consider putting more clips onto this channel and introduce links to its other channels in the future.

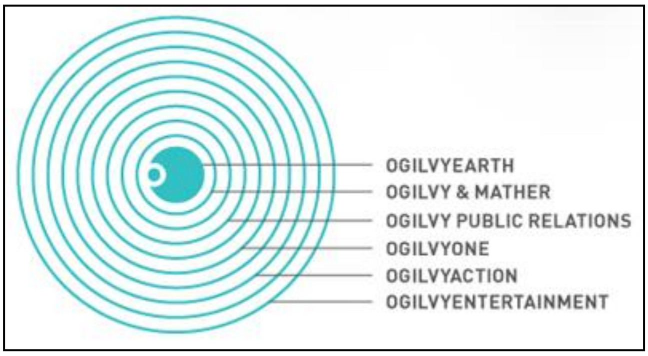
Speaking of internal network, the only connection between OE and Ogilvy is Kathleen Enright. Thus, the action taker and driver for growth plan will fall onto her. Growth strategy and action plans will be discussed in details in Chapter 7. However, on a side note, there are currently 2 Kathleen Enright's occupying the online platform (See: Figure 4). The other Kathleen is President and CEO of Grantmakers for Effective Organizations (Geofunder, 2013). This surely gives some confusion to external clients trying to get in touch with Kathleen as even the internal employees declares so from the beginning of her term at OE. This can be solved by Kathleen having more presence in the online platform and being more prominent representing OE in more events, etc.

Figure 4: Google Search on Kathleen Enright

5.2 OE UK'S CURRENT BUSINESS MODEL

OE UK is a profit unit sitting with and under OPR in London. However, OE does not limit its partnership and working network to only OPR. OE experts "plug & play" other Ogilvy teams across UK and, where possible, across Europe (See: Figure 5). OE believes that co-creation is key to finding creative solutions to sustainability (OE Creds, 2013).

Figure 5: OgilvyEarth "Plug & Play" (OE Creds, 2013)



5.2.1 Product Offerings

There are four main products that OE currently offers based on its core capabilities (See: Figure 6). Under the lead of Kathleen Enright from 2011 to date, majority of works (44 per cent) falls into *strategy* while main source of revenues comes is *branding* (53 per cent). Although *shopper* gives the least percentage both in terms of number of projects and revenues generated, it is plays as important resource for OE's thought leadership. The 'Mainstream Green' research can also be classified under this core capability. OE could have used more of its research findings to build a lot of discussions around this area. The research also goes very well with OE's mission to 'move sustainability from niche to normal.'

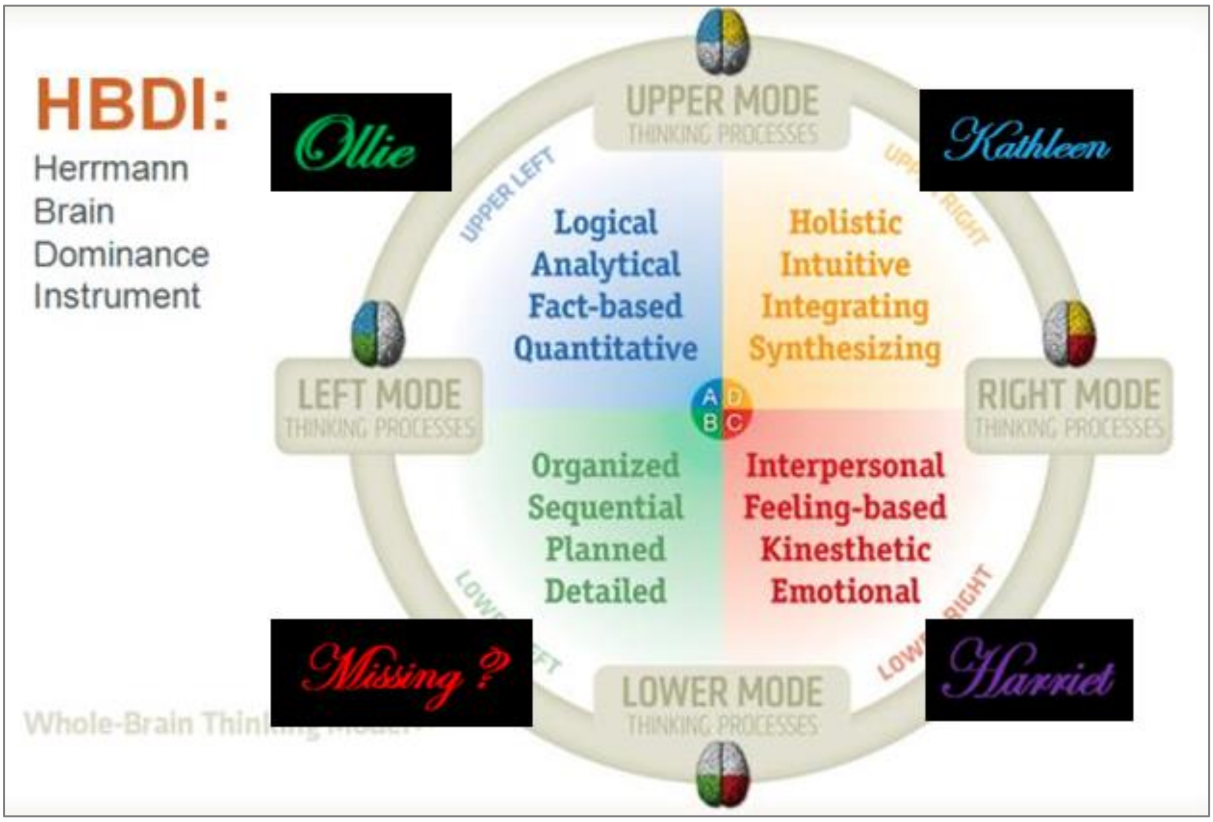
Figure 6: OE's Core Competencies and Key Product Offerings (OE Creds, 2013)

BRANDED EARTH	INSIDE EARTH	STRATEGY EARTH	SHOPPER EARTH
• Sustainability audit • Product development strategy • Sustainability vision & positioning • 360 campaigns	• Employee surveys • Internal sustainability communications • Employee engagement platforms • Training modules	• Corporate governance • PR & Reputation management • CSR report writing • Stakeholder engagement • Partnerships	• Shopper engagement platforms • Behaviour change campaigns • Trends forecasting

5.2.2 Team & Product Delivery

In terms of product delivery, each product will entail different delivery details. But generally speaking, OE team has great assets as each team member is specialised in distinctive areas. Kathleen Enright, UK Director, is having an overarching skillset from strategy, to marketing, to deep sustainability knowledge. She can lead and guide, both hands-on and hands-off the projects. Harriet Kingaby, Sustainability Strategist, is very good at social and societal side especially employee engagement which has become one of the key focus areas in today's sustainability field. Oliver Burch, Sustainability Analyst, possesses very analytical mind and has great educational background as well as interest on environmental side of sustainability. By using HBDI's Whole Brain® framework, the team profile can be summarised into Figure 7 below.

Figure 7: HBDI Whole Brain® Framework on OE UK Team Members (HBDI, 2013)

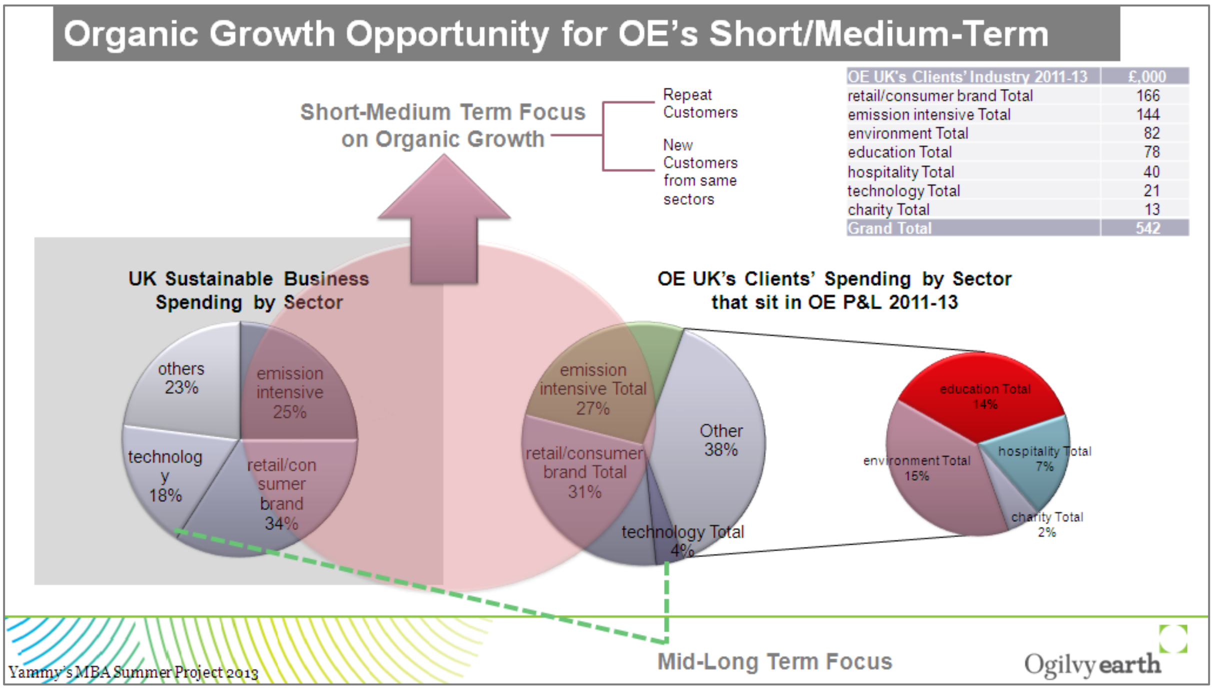


5.2.3 Clients

OE UK has a wide range of client portfolio such as those in retail/consumer brand (e.g. Unilever and Nescafé), emission intensive (e.g. Volvo and Ford), education (e.g. Plymouth University), and charity (e.g. Nesta). Considering the revenue generated to OE UK during 2011-2013, emission intensive and retail/consumer brand sectors have been the key sources of revenue, accounting for over half of the total income (See: Figure 8).

Interestingly, the percentage of revenue generation of the above 2 sectors coincides with the top 2 sectors that spend the most on sustainability. From Verdantix's report (2012), the sector that will spend most on sustainability is retail/consumer brands, contributing 34 per cent of total spending. The second sector, emission intensive such as oil and gas, transport, and utility, accounts for 25 per cent of the spending. Then, telecom and technology contributes 18 per cent. This concurs with findings from (Eccles et al, 2013) that the individual consumer industry, industry with intense brands and reputations competition, and natural resource-intensive industry have the best return on sustainability spending.

Figure 8: Organic Growth Opportunity for OE



Considering the sustainability spending trend, OE's short to medium term goal can then focus on the first 2 leading sectors (i.e. retail/consumer brand and emission intensive) as an organic growth plan while it can expand the focus to the third leading sector (i.e. technology) for the medium to long term goal.

5.3 OTHER OEs

To better understand OE UK's current situation, it will be beneficial to also assess the situation at other OE offices. This is to compare the commonalities and differences between each office's operations including marketing strategy. Figure 9 is the deck displaying key commonalities and differences between 5 OE offices while detailed discussion will be based on 2 offices in San Francisco (SF) and New York (NY). The reason for choosing only SF and NY against UK is that SF is currently, debatably, the rising star amongst all OE's and NY is where the original idea of having OE emerged as well as where Kim Slicklein, President of Global OE currently resides. The marketing, HR and operations, and finance dimensions of the 2 offices will be discussed in the following sections.

5.3.1 Commonalities of All OE's

There are two commonalities amongst all 5 offices: detachment from OE global network and area focus. In every office, OE team feels they are not a part of OE global network although Kim Slicklein has been appointed President of Global Ogilvy since June 2011 with the main mission to transfer knowledge across all OE's and create a strong global network across all OE offices. There has been, however, no support or referral across geographies thus far. Each office still focuses exclusively on its own geography with limited knowledge of what is going on beyond its own office or regional border.

5.3.2 Marketing

Only OE SF does marketing properly and things were planned out before the team was formed at the beginning of 2013. It has clear positioning and targeting. OE SF focuses on the companies that involve in social impact, natural resources, and clean technology. It bundles its offering with other larger Ogilvy practices especially OPR to deliver more value to clients. Event sponsorship and attendance are also an integral part of marketing activities for OE SF to seek new opportunities and stay involved with sustainability community.

In comparison, OE NY owns US's website (which is regarded as global website), Facebook, and twitter but does not use them properly. As OE NY does not actively attend events nor publish thought leadership pieces lately, online platform seems to be the only marketing channel that it can communicate to clients and to maintain client pipeline. Unfortunately, the team does not seem to perform well in this dimension.

Figure 9: : Commonalities and Differences Deck

Commonalities & Differences between UK / NY / SF / SA / OZ

OE Commonalities	London	New York	San Francisco	Cape Town	Sydney
Feeling detached from OE global network	Yes	Yes	Yes	Yes	Yes
More area-specific than global network	Yes	Yes	Yes	Yes	Yes

OE Differences	London	New York	San Francisco	Cape Town	Sydney
Own real P&L	Yes	(Shadowed)	Yes	Yes	-
Most clients' works from Ogilvy Network	Yes	Yes	Yes	-	Yes
Sitting in OPR	Yes	-	Yes	-	Yes
Clear task boundary within team	-	-	-	Yes	Yes
Passionate Head	Yes	-	Yes	Yes	Yes
Dedicated Team (Full time)	Yes	-	-	Yes	-
Sustainability Expertise	Yes	-	-	-	Yes
Own Twitter	Yes	Yes		Yes	-
Own Web	-	Yes	-	Yes	Yes
Own LinkedIn, FB	-	Yes	-	-	-
Many sustainable businesses found locally	-	-	Yes	-	Yes
Attend events & conferences	-	-	Yes	Yes	-
Sponsor events & conferences	-	-	Yes	-	-

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OE UK, despite having a mainstream marketing character holding Head of Practice and UK Director position, due to the lack in marketing planning and strategy, it underutilises the expertise within team. With a better plan and clearer task allocation, OE UK will be able to seek more external marketing opportunities similarly to how OE SF is networking in local community. In addition, OE UK is already well known for its capability and good work among the OPR people hence it could have done better in connecting with wider Ogilvy network.

5.3.3 HR and Operations

OE SF operates without a dedicated full time member. The team is entirely project-based. Each of 12 team members is assigned under other Ogilvy teams and will assemble team as sustainability project arises. This helps reduce overhead costs and downtime because team member can work on other projects. The downside is, arguably, no dedicated resource for clients. In addition, OE SF views itself as PR professional with sustainability touch compared to OE UK who claims sustainability expertise. OE UK can, therefore, service the client in more specialised project compared to the SF team.

For OE NY, the team recently underwent significant manpower loss due to the president's 2^{nd} maternity leave. The team morale and confidence was low without the leadership. Currently, there are 2 people working in team while at the same time also taking up other roles and responsibilities. OE NY is now trying to transform its business model from being a profit unit with its own Account people to working collaboratively with other Ogilvy teams and acting as internal sustainability consultants with only a couple of people sourcing and developing new businesses. With this transformation, OE NY hopes to gain more support from other units and together grow the business using sustainability as one of the selling points.

The new OE NY's model is interesting compared to what OE UK is trying to achieve. While NY is reducing headcount, UK is hoping to expand the team with dedicated team members. However, with SF's and NY's best practices combined, OE UK has a potential to increase more headcounts to work on sustainability projects while collaborating better with Ogilvy network in product delivering and connecting more widely with external partnership to bring in more businesses. With a strong team and strong internal network, OE UK will be able to handle and organise more client works in its pipeline.

5.3.4 Finance

Despite having own P&L, each office has different financial practices and results. OE SF is the newest OE team being founded at the beginning of 2013 with its own P&L in the West Coast. The team is arguably a rising star as it was established out of the growing needs. After having supported others during the past years, the management team saw the growth opportunity to set up a separate OE SF team to work more on sustainability projects especially to cover local business opportunities in the Silicon Valley.

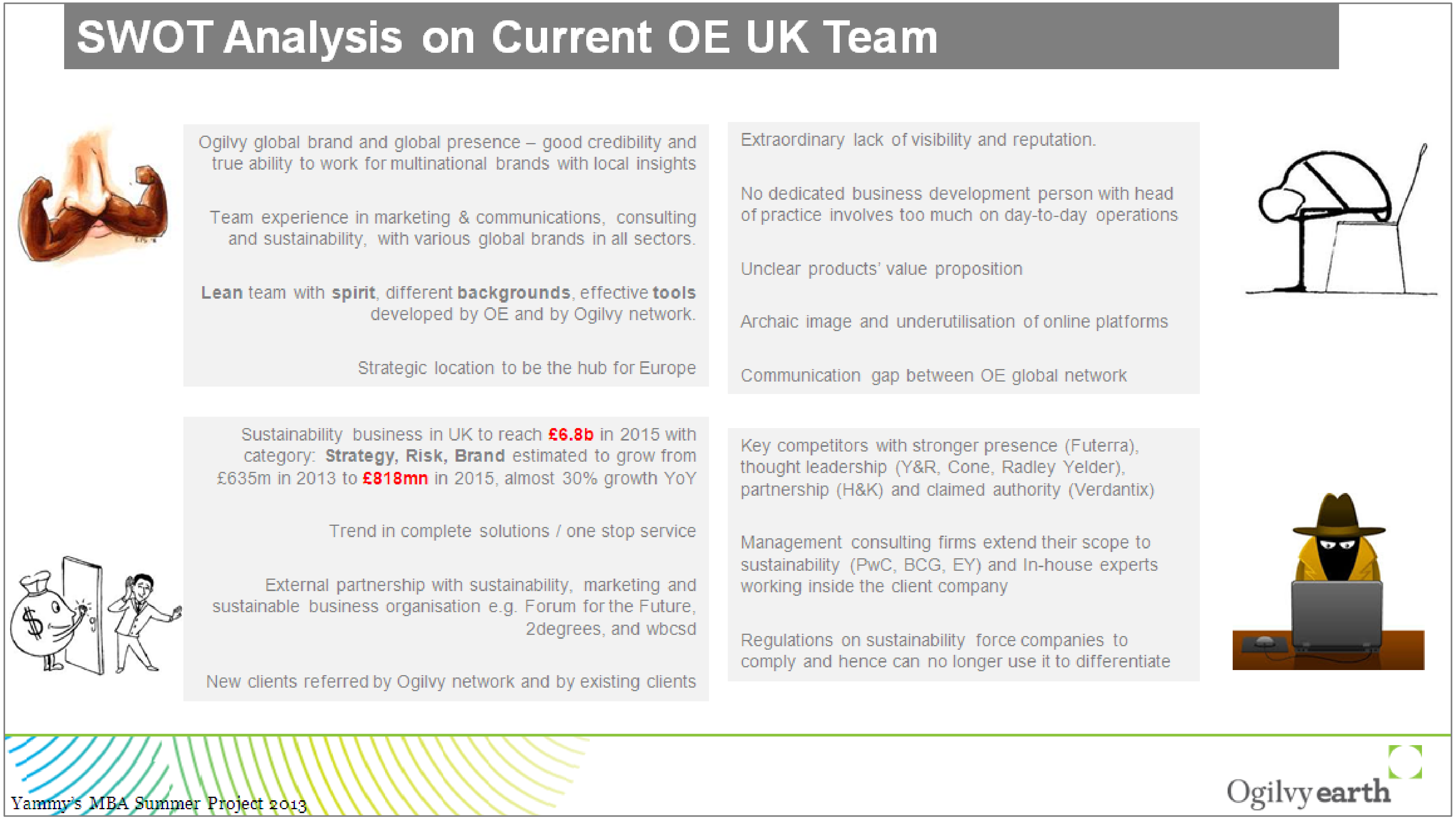
For OE UK, sharing the profits with other Ogilvy teams while managing its own P&L has worked well to gain support from Ogilvy network. This also allows OE UK to gain credibility from working on sustainability aspect of existing Ogilvy's clients. On the contrary, OE NY had trouble maintaining a working relationship with other Ogilvy team due to profit sharing scheme. It was simply difficult when the collaboration comes with a cost. OE NY is then moving towards being a non-profit centre as a result of poor financial performances.

Agreeing on the acceptable profit sharing with other Ogilvy teams is one of the keys to promote collaboration and referrals.

5.4 SUMMARY FOR CHAPTER 5

With a thorough understanding of the OE UK's performances in relations to other OE's from this Chapter as well as the knowledge gained market place and forces within the industry from the last Chapter, the analysis of all findings thus far will be summarised in the form of SWOT (See: Figure 10) showing how strengths can allow OE to exploit the opportunities in the market while mitigating against weaknesses and threats.

Figure 10: SWOT Analysis on OE UK Team



5.4.1 Strengths

OE's greatest strength is its affiliation with Ogilvy. Ogilvy's global brand and presence help build OE's credibility and enables OE to work for multinational companies to further enhance its reputation. OE can also leverage other Ogilvy teams for business leads and client introductions. In addition, it has proven tools and frameworks from Ogilvy that it can use to differentiate itself from competitors. This also enables the team to be very lean. By maintaining only a few experts and pull resources from larger Ogilvy system as needed, OE can keep the fixed costs low and ease its interaction with other forces.

The team members of OE are its strength. With experiences working with global brands in various sectors, they have the track record to show potential clients. In addition, they have broad spectrum of skillsets and experiences, ranging from marketing and communications, strategy consulting, and sustainability. Their versatility is proven to be an asset to serve the clients and differentiate itself. From the broad skill set, they can also expand into complementary service and reduce the power of complements.

Lastly, its strategic location in London allows easy expansion to become European hub. Ogilvy Group UK in London is one of the strongest team in Europe. Hence, OE can easily expand its internal network from here across to other countries. Also, this is where a few global and regional Heads of Ogilvy reside, which enables an accessible business discussion and good collaboration of decision making.

5.4.2 Weaknesses

OE's greatest weakness is its lack of visibility and reputation. It does not fully utilise Ogilvy network to build as much awareness as it could have. Even sustainability manager of WPP, its ultimate parent company, does not take OE seriously and has difficulty establishing the connections between OE and Ogilvy. Furthermore, OE has an archaic image and underutilisation of online media. Its You Tube channel was created in 2012 and only has 3 clips uploaded thus far. OE UK team does not have access or control over other forms of online channel. As this channel becomes more prevalent, lacking digital presence and interaction can limit OE's opportunities significantly.

While the OE team's skills and experiences are its strengths, the team lacks clear division of labour. There is no clear ownership of business development, resulting in no work pipeline. The team alternates between busy periods when they have more work than they can handle and down periods when they have very limited amount of work. The head of practice involves too much on day-to-day operations and client work during busy period and only does business development when they are in down period. The unstable workload hurts the team's morale and increases its dependency on other Ogilvy teams for resources.

OE also has communication gap with OE global network. The global president was appointed 2 years ago with the aim to establish a strong network amongst all OE's (Enright, 2013). Yet, with her 2 maternity leaves after assuming the role, the network has never been established and each team still works individually without being aware of what is happening in other OE teams. A stronger network could have eliminated the communication gap and built powerful global taskforce to compete better in the global market.

5.4.3 Opportunities

The largest opportunity for OE is the sustainability market growth. The overall business spending on sustainability is forecasted to reach GBP6.8 billion in 2015, with spending on strategy, risk, and brand is estimated to be GBP818 million. More sustainability projects leads to more demand for sustainability communications, which will benefit OE.

The trend for one-stop service and complete solutions (Elting, 2013) also benefit OE. Companies are trying to avoid engaging with several suppliers and prefer to work with one supplier who can provide comprehensive service and solutions. This is to reduce paperwork and internal approval process as well as reducing search and contracting costs in terms of working hours and manpower. Given its strength in broad range of skillsets, OE can take advantage of this opportunity.

Partnership with relevant trade organisations such as sustainability, marketing, and sustainable business associations can be beneficial for OE. The growing importance of sustainability will drive more participation in sustainability conference and trade association. External partnership can give OE the visibility and business opportunities that it needs. Currently, OE has not tapped the potential of this channel. Event sponsorship and attendance are common for other successful OE office. Internal referral from other Ogilvy team and existing clients can also give more revenue to OE.

5.4.4 Threats

The major threats are from OE's competitors. With more budget spending on sustainability, competitions from old and new players is expected. There are competitors who compete on strong presence, thought leadership, partnership, and claimed authority. Each is competing for similar clients. In addition, management consulting firms are expanding their scope to work on sustainability projects. Companies are starting to have in-house sustainability expert to manage all sustainability spending and projects. All these will add more competitions to OE.

A more distant threat is government regulation. Legislation to regulate environment, social, and employee impact of companies will force companies to comply. When every company has to work on sustainability projects as a result of regulations, there is no differentiation and there is no need to communicate such sustainability projects.

CHAPTER 6: COMPETITOR ANALYSIS (WHOM OE PLAYS AGAINST)

Having analysed OE UK's business practices in relation to other OE offices worldwide, it is equally important to see how OE UK is doing against its direct and potential competitors. This is to evaluate what OE has done well and could have done better in order to lead the market it is in. Both OE's direct and indirect competitors will be analysed. The Chapter will start with perceptual mapping to give a big picture of who OE is playing against and where they are placed in the mind of clients. Then, a combined list of product offerings will be presented to show the commonalities and differences, as well as the offerings that can be most favourable for OE. These 2 overview sections will be followed by analysis of each key competitor in greater details.

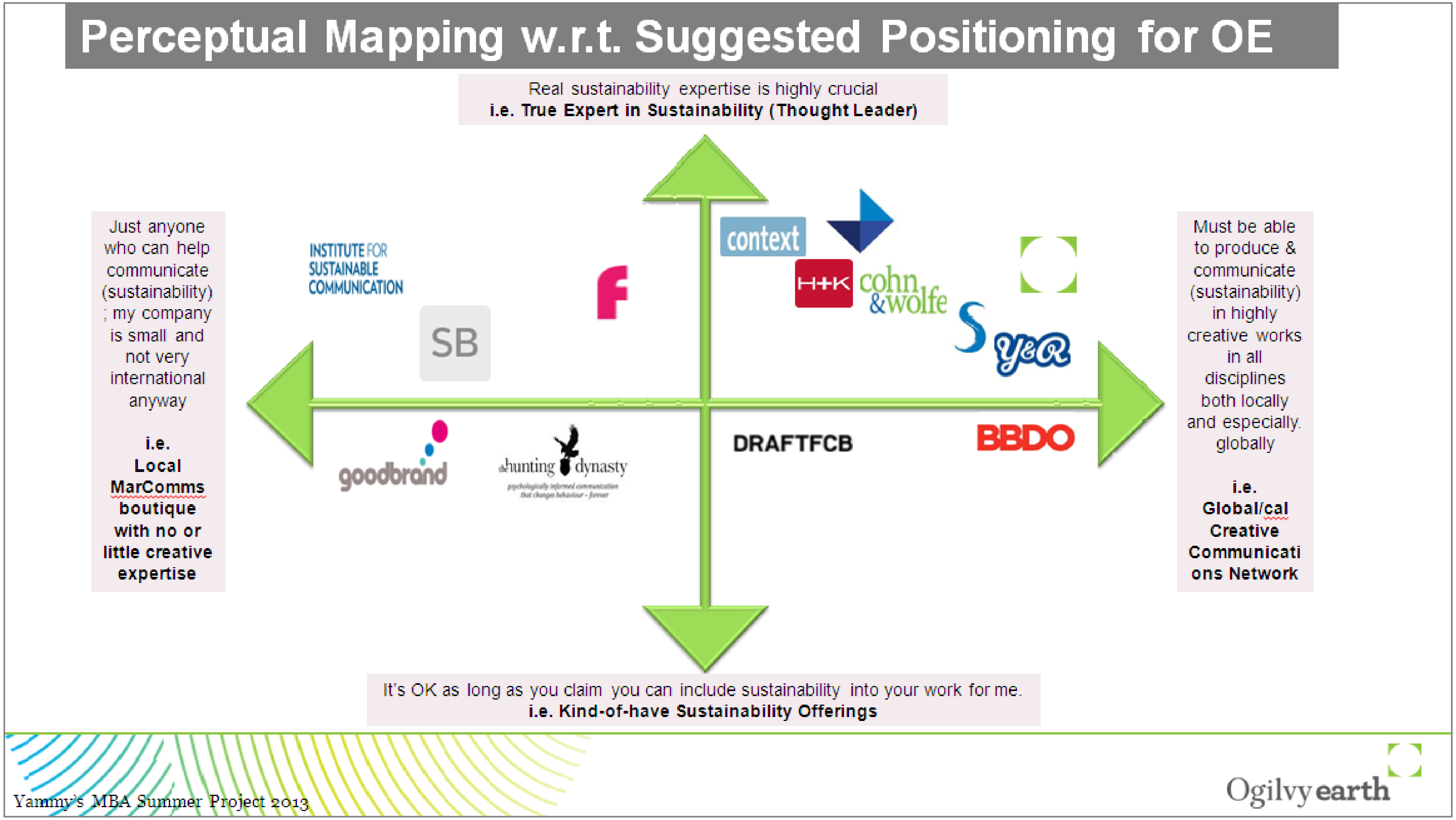
6.1 PERCEPTUAL MAPPING

A good way to start this Chapter is by looking at the whole range of OE UK's competitors in relation to their positioning in the mind of clients by using perceptual mapping (See: Figure 11). There are 2 axes in the map. The first one represents the degree of sustainability expertise needed by clients which means the agency must have strong sustainability team or members in the agency who can rigorously give a true advice on this field.

The second axis represents the strength and width of global creative network needed by clients which means the agency must have worldwide network to be capable of delivering a global project as well as having local offices in different countries to capture the local insight. Also, in order to be a truly creative agency, the criteria are the wide range of practices in delivering the work that clients can choose from.

In addition to an overview, this perceptual mapping also suggests that most favourable quadrant to be in is the top-right corner where OE can leverage its Ogilvy Worldwide network to be on the far right while it still has room to grow towards more expertise area. The farer it is, as perceived by clients, on the top-right direction, the more differentiation and competitive advantage it has successfully created.

Figure 11: Perceptual Mapping with regards to Suggested Positioning for OE



6.2 PRODUCT OFFERINGS

Out of the whole product range offered by OE's competitors (See: Figure 11), there are only 3 categories that OE does not offer: Data analytics, Webinar, and CO2 measurement. However, it is not advisable for OE to consider them at the moment. Data analytics will require more dedicated headcounts to run and although the analytic results will give more and deeper information for OE's thought leadership, it is not the only way to generate thought leadership. Furthermore, the nature of task slightly conflicts with the nature and image of creativity of Ogilvy.

CO2 measurement requires technical knowledge and is not of OE's current or short-term capability to do so. In addition, the possibility to invest in this is also limited yet there might be possibility for OE to partner with other specialised organisations in the future and offer itself as a one-stop service that brings together not only Ogilvy creative network but also sustainability-related technical experts.

Webinar is interesting area that OE can possibly expand into once it establishes the physical training. It will require more investment and therefore need further evaluation and adjustment to see if it is worth doing in the next couple of years.

In terms of competition, fierce competition exists on two of the three growing areas: Strategy (94 per cent) and Branding (73 per cent), leaving a bigger pie on Risk and Reputation management (33 per cent). The areas that competition is less than 50 per cent are Employee Engagement/Survey (47 per cent), Consulting (40 per cent), and Employee Training (33 per cent). It is not advisable to jump into the consulting field, though, as many global consulting firms are extending their arms to sustainability.

Employee-related offering is more interesting as, from the global trend researches (Aspey, 2012), employee is one of the 3 key stakeholders (employee, investor, and customer) whose importance has and will increase in the future.

Figure 12: Product Offering Deck

	Offers >>	Strategy	Message dev't	Thought leader / Publications	Digital	Branding	Behaviou change	Report writing / Factsheet / Brochure	Copy/ content	Stakeholder /Community Engagem't	Employee Engagement/Survey	Consulting	Risk/Reputation Mnmt	Employee training	Data analytics	Webinars/ Online Training	CO2 measurement
OE	Creative	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	-	-	-
Futerra	Niche	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes	Yes	Yes	Yes	-	Yes	-	-	-
Context	Niche	Yes	Yes	Yes	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes	Yes	-	-	-	Yes
GoodBrand	Niche	Yes	Yes	Yes	-	Yes	-	Yes	Yes	Yes	Yes	Yes	-	-	-	-	-
Edelman	PR	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes	Yes	-	-	-
H+K	PR	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	-	-	Yes	Yes	-	-	-
Cohn&Wolfe	PR	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	-	Yes	Yes	-	-	-
BBDO	Advert	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes	-	-	-	-	-	Yes	-	-
Y&R	Advert	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes	-	-	-	-	-	Yes	-	-
DRAFT TCB	Advert	Yes	Yes	-	Yes	Yes	Yes	-		-	-	-	-	-	Yes	-	-
Saatchi S	Advert	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes	-	-	-	-	-	Yes	-	-
SalterBaxter	Sust.Consult	Yes	Yes	Yes	Yes	Yes	-	Yes	-	Yes	Yes	-	-	-	-	-	-
Hunt. Dynasty	PsychoCom	Yes	Yes	Yes	Yes		Yes	Yes		-	-	Yes	-	-		-	-
ISC	Institute	-	-	-	-	-	-	-	-	-	-	-	-	-	Yes	Yes	-
Verdantix	Analyst	Yes	Yes	Yes	-	-		Yes	-	-	-	Yes	-	-		Yes	-
		14	14	13	12	11	10	9	8	8	7	6	5	5	5	2	1

6.3 OE's DIRECT COMPETITORS

There are only a few prominent players in this space with some small agencies. This includes, for instance, Futerra, Context Group, Good Brand, Corporate Citizenship, Radley Yelder, Glasshouse Partnership, and Clarity Sustainability (i.e. www.think-sustainability.co.uk). The key area that arguably all agencies and consultancies mention they do is employee/corporate engagement while issue and reputation management is the after-crisis sustainability and CSR trends. There are, however, some points of differentiation amongst them. For instance, Radley Yelder produces an immense amount of reports, Glasshouse Partnership focuses on transparency and how to communicate sustainability strategically in the transparent world, and Clarity Sustainability offers various free webinars. 3 leading players in this category, i.e. Futerra, Context Group, and Goodbrand, will be reviewed and analysed in this section.

6.3.1 Futerra

The agency was founded ten years ago by the two graduates from Forum for the Future Academy. They have big characters and probably are of the very few who stay until today (Kingaby, 2013). Futerra's website represents good marketing skills. It gives short and clear messages which respond well to today's people fast-pace lifestyle. Futerra states very briefly and clearly on its landing page that Futerra is "*the* sustainability communications agency" and its "mission is to make sustainable development so desirable it becomes normal" (Futerra, 2013b). Futerra's website appears very often in the search engine with the tagged word 'sustainability,'

Its website is very lively and features a good number of clients. Its' clients' works range from employee engagement (e.g. PwC, Bupa, L'Oréal) to strategy and guide (e.g. Kingfisher, Danone), and from fact sheets and packaging (e.g. Unilever, Plymouth Marine Laboratory) to animations and films (e.g. Unilever, UNEP).

The strengths of Futerra lie in the showcase of its massive number of clients and of its people with their short friendly and systematic notes. On its blog, it captures a lot of what is going on in the sustainability market and reviews those happenings with its own voice. Examples are those of Sustainable Brands (SB), BBC and Unilever. Futerra also mentions about mainstream and behavioural change.

The weakness of Futerra is fundamental. The team and organisational structure is not truly professional. The turnover rate is high and the agency runs short of committed employees as it tends to attract a lot of interns who turn to be very young and junior staff and finally leave for a better and more stable agency. Futerra therefore does not have many senior staff to pass on the knowledge to new generations.

Futerra's strategy is to have specialists in different key areas. As soon as one person leaves the agency, their replacement will have the same or close skill set. This is all planned out for its credential storytelling. For website, its strategy is to feature as many brands as possible and give the feeling that Futerra is everywhere. Futerra hires very young professionals who come with novice ideas and are ready to mix and match the ideas from others and make them sound like Futerra-created ones (Kingaby, 2013). A living example is the Axe's Showerpooling campaign on its website where it talks about Brand Muscle (Futerra, 2013c). This campaign can be easily mistaken as a work done by Futerra while in fact by Ogilvy.

What OE can learn is having a lot of client logos flashing on website and instead of only tweeting, OE can also review interesting sustainability updates on its blog and tweet about its blog on its Twitter account. This way, its online platforms are inter-linked which can potentially increase the number of Followers who will help expand the brand's visibility, and at the other end, those on the Twitter are redirected to the blog on OE's website which will increase the traffic on the web and encourage visitors to browse more on other online platforms being linked from its website.

In addition, the way that Futerra features its clients' works can be applied. The feature is brief and showcases solid data such as figures (e.g. UNEP's Living Outside The Box Film project that the report was downloaded 60,000 times in the first month after launch and the film was viewed 12,000 times online). For those whose data are confidential or obscure, testimonials can then replace the hard facts (e.g. Unilever's Unilever's Senior Vice President Global Communications applauding its Sustainable Living Plan project).

6.3.2 Context Group

Context is a corporate sustainability consultancy founded in 1997 with headquarter in London and offices in Los Angeles and New York. Its main works lie in sustainability strategy and communications (Context, 2013a). There is a full list of clients' awards presented in a separate section on its website. Names of clients and their winning projects are given under themes, separated by years ranging from 2004-2012. There is also a wide range of publications by Context, revolving mainly around corporate sustainability with some touch on reporting, stakeholder engagement and strategy. Colourful covers with short explanation of what they are about are clearly shown on its website with the invitation to visit its blog and download the publications for free.

Both of its .com and .uk websites give exactly the same details, replicating one another. This is a good idea as the top 2 leading search engines (i.e. Gogle and Bing) tend to bring up different domains. From author's observation, Google tends to bring up more domain *com* while Bing brings up more domain *uk* sites. By having two different domains, Context Group diversifies its risk of not coming up on the first page of search if user only uses one search engine to look for information. However, this conveys the flipping messages that it is so integrated that there is no separation between the offices or that each office does not have enough to say if having its own website.

Context's strength is its writing skills, clear presentation of its expertise in environmental and social issues and its transatlantic network between the UK and USA. Roger Cowe, with an MBA from Manchester Business School, contributed to the development of corporate sustainability development writings since late 1980's as business journalist at The Guardian and later on as a freelancer. He joined Context in 2005 and is currently Affiliate at Context Europe. Peter T. Knight, President of Context America, is also an accomplished writer. He was once UK Environment Journalist of the Year and his articles often appeared on the Financial Times. Context's clients as featured on the websites are apparently some of those that Peter used to work for. This can then be assumed that Knight uses personal connections to bring businesses into the agency.

Its weakness, however, is the lack of its presence on online platform especially on the social media. Context has only 510 followers on Twitters (as of 06 August 2013) and no Facebook page. With the knowledge that it has so many publications on the sustainability, its name does not appear often when searching for sustainability-related subjects.

Context's strategy is therefore seem to talk a lot on its own website, gives free downloads of its publications and make big claims on its client works. Interestingly, WPP is claimed to be its client since 2002. Below is what is on the website:

> *"What does corporate sustainability mean for one of the world's largest communication services groups? With our help, WPP became the first to respond to this question (in 2002), defining the agenda for the sector. We helped WPP assess its issues, develop its CS policy, establish a management structure and then report on performance."* (Context, 2013b)

> *"Our work has included advice for WPP agencies and client teams on sustainability issues."* (Context, 2013c)

What OE can learn from Context is the bold claim on client works, especially the link to the WPP Group, the replication of the .com and .uk websites and perhaps the creation of agency's cartoon characters. Context was about 10 years older than OgilvyEarth yet they resemble in many aspects e.g. main offices in the UK and the US, numbers of followers on Twitters and colour scheme that represents the agencies.

However, Context's website features numerous testimonials while OE does none. This feature can help increase OE's credibility as third party endorsement is vital when the competition is high and clients are somewhat cynical and requiring more transparency (Burnham, 2013; Conlon, 2013). OE can also tremendously increase the number of case studies and should mention a lot more of work done in corporation with the other Ogilvy offices as this is the point of differentiation of OgilvyEarth from other sustainability communications agencies or consultancies.

Context's blog is one-way communication but very active in feeding few articles every month. It also gives opportunity for visitors to Tweet, Like, and Google +1, which is a good reactive way to have its article featured in other online space without having to do it itself (although it should have addressed itself (i.e. @Context_Group) on its pre-made Tweet message). As OE has a small team with currently limited resource, it is a good idea to have one-way communications and embed such online-sharing strategy.

6.3.3 GoodBrand

GoodBrand was founded in 1997 as “one of the first dedicated CSR/Sustainability consultancies in the world” (GoodBrand, 2013a). GoodBrand’s **strength** is its focus on “Economic Return on Social and Environmental Investment (EROSEI)” (GoodBrand, 2013b) understanding as well as leading with the idea that only if sustainability can give economic returns, environmental and social investment will increase.

However, the old-looking and excessively simple web design can be its **weakness**. GoodBrand also has only 223 followers on Twitter as of 11 August 2013 (@CSRIndex, 2013). Assumedly, its special Twitter name which does not link to the brand has made it hard for people to find and follow. If this is true, the case of Kathleen Enright’s Twitter Account might apply the same assumption. However, more investigation and further analysis needs to be done in order to finalise the true cause.

6.4 OPR's COMPETITORS

There are a lot of agencies competing in this space both locally and internationally e.g. Edelman, Hill+Knowlton, Ketchum, Cohn&Wolfe, and Salt. An exhaustive qualitative research has been conducted in order to come up with 3 leading player who are not only leading in this space but also have done well in terms of sustainability communications. This section will therefore analyse 3 PR agencies: Edelman, Hill+Knowlton, and Cohn & Wolfe in details.

6.4.1 Edelman

Edelman was founded in the 1950's aiming to redefine the role of public relations and is currently the world's largest PR firm (Edelman, 2013a) that is trusted by big global corporations and organisations (Farrar, 2008). In July 2013, Edelman was bought in by The World Business Council for Sustainable Development (WBCSD) – "the most influential business voice on sustainability" (Sudhaman, 2013) to help raise its global profile with special focus on driving the achievement of 2020 goals.

Hence, **Edelman's strength** is its history, size, and tight global network. The long way up the road is filled with legacy and many success stories which attract global clients who need the global firm that appears in many countries and has insightful local knowledge and understanding (Sudhaman, 2013).

Its weakness may lie in its website. Edelman's website looks fairly sober and sad. This may represent the tone of the company and give calm feeling to visitors yet it could have radiated more excitement. Edelman is not very much active with blogs but every blog tells essential details. For example, its last post in July is about announcement on appointment of Anji Hunter as senior advisor (Edelman, 2013b) and its post in June showcases its success in winning one gold and two silver swards at Cannes PR Lions (Edelman, 2013c).

Its UK sustainability business strategy is the mix of sustainability team and the external advisors. Edelman claims to have sustainability team. However, no matter if it has the special team, its strength actually lies in its **external advisers** including Professor Noreena Hertz, Fellow at Judge Business School, Cambridge University; and Jules Peck, environmental and wellbeing adviser and Director of David Cameron's Quality of Life Commission.

What OE can learn from Edelman is to leverage the global brand legacy. Although OE UK is officially only 4 years old now, it is sitting with OPR in London and works hand-in-hand with other Ogilvy networks around the world. This is a crucial fact that OE's clients need to know and to give trust to OE as one of the world's prominent global agency who already acquires international vision as well as local insights.

6.4.2 Cohn & Wolfe

Cohn & Wolfe is part of the WPP family and was awarded 2013 PR Agency of the Year by PRWeek US (PRWeek, 2013). Cohn & Wolfe writes a lot of blogs which it calls 'Insights and Ideas.' Eco-Wolfe is one of the categories in the section that talks about eco-news, green brand initiatives, and tips on how to lead an eco-life (Eco-Wolfe, 2013). It lays sustainability under its practices and conducted a massive global consumer survey of green brands in 2011 which features as one of its thought leadership pieces.

Cohn & Wolfe has so much to say about **its strengths** and this is summarised nicely on its own website:

> *"Our CEO was identified by PR Week as one of the Most Powerful People in PR. We were named 2013 Agency of the Year by PRWeek and were the only public relations agency on Advertising Age's Best Places to Work list two years in a row. And the agency's creative work was defined by The Holmes Report as "among the best in the business.""* (Cohn&Wolfe, 2013a).

Its weakness is perhaps the fact that it has done so much and already integrated the sustainability works in its other projects. Hence, there is no clear line on what type of sustainability works that they are offering at the moment. Also, its lack of UK website makes it difficult for the UK clients to recognise its local insights and probably doubt if this agency would be for them on a local scale which can sometimes bring more revenues to the agency than big global customers.

Its sustainability strategy is being the thought leader in the field. It has many blogs and articles articulating interesting questions and ideas such as 'Why sustainability isn't just for hippies' (Cohn&Wolfe, 2013b) and the 2011 Green Brands survey (Cohn&Wolfe, 2013c).

6.4.3 Hill+Knowlton Strategies

Hill+Knowlton Strategies has specified its CSR into three different areas: employee retention, growing business as supported by its CSR commitments and environmental policy.

Its strength and sustainability strategy seem to be partnership with prominent partners, which can potentially help raise its credentials at global level. In early 2012, H+K strategies launched the new offering to advise clients on how to use sustainability via integrated reporting to enhance their financial performance. This offering will be co-supported by Harvard Business School Professor Robert G. Eccles, "one of the world's foremost experts on integrated reporting," and his firm, Glenelg Partners (H+K, 2013).

Its weakness is however the lack of sustainability work showcase on its UK website. It says about the new integrated reporting offering as mentioned above in US website and still there is not case study done on this. Sustainability is listed as Specialist offering with very brief description. H+K Strategies is therefore not one of the most visible and capable players in sustainability field.

6.5 O&M's COMPETITORS

Behavioural change seems to be the growing area of interest for advertising agencies to talk about and to relate their works to recently. However, although none of the agencies being studied in this research (e.g. BBDO, DRAFTFCB, and Y&R) mentions that it has special sustainability team, a good number of them have produced great works using sustainability theme. Figure X shows a list of environmental advertising campaigned that have powerful message across the globe. This proves well that sustainability is a subject that advertising agencies can draw upon in producing an impactful work. This section will then analyse in details 4 agencies that stand as leaders in advertising and have done great work on sustainability communication: BBDO, Y&R, DRAFT FCB, and Saatchi S.

Figure 13: Agency with Top Environmental Ads (Muzaurieta, 2012)

Source	The Daily Green	
Topic	11 Powerful **Environmental** Messages	
Post Date	30-Nov-12	
Retrieved Date	12-Aug-13	

Agency	**Ad Name**	**Country**
DRAFTFCB + IDB	Polar Bear for Ecoeduca	Chile
VVL BBDO	Ice cream for WWF	Belgium
Publicis Conseil	Orang Utan for EDF	France
Ogilvy & Mather Bucharest	Deer for WWF	Romania
Lowe Zurich	Under the Sea for Greenpeace	Switzerland
Contrapunto	Lobster for WWF/Adena	Spain
Y&R Paris	Glove for Surfrider Foundation	France
Uncle Grey	Tarzan for WWF	Denmark
Goodby, Silverstein & Partners	Radial Turtle for CA Coastal CleanUp Day	United States
Almap BBDO	Alligator for Fundacao O Boticario de Protecao a Natureza	Brazil
Rapp Collins	Elephant for IFAW	Netherlands

6.5.1 BBDO

The company was founded during the break gap between WWI and WWII and claims to be the world's most awarded advertising agency with 15,000 employees in 289 offices across 81 countries. (BBDO, 2013a). With trust and compelling campaigns, its key clients remain in relationship for over decades. It holds Armstrong account in the US for over 90 years, GE since 1921, Procter & Gamble/Gillette and Pepsi for half a century (BBDO, 2013a).

The Visa Cycle Generator by BBDO India (Mumbai) in May 2013 sends a strong brand message and links that to power shortage and generation. Although the direct message is the power of Visa, surely on the other side of the coin, the ad raise awareness or sparks people to think about the lack of energy in the faraway land and how hard it can be generated. This can ultimately make a behavioural change in viewers in the more developed parts of the world.

BBDO does not mention any direct message about how it cares about sustainability and hence no sustainability team sitting inside the agency, Yet, many of its advertising campaigns address the environmental and social issues in a subtle and indirect ways such as Save the Children's *Every Beat Matters* by BBDO New York in February 2013 and General Electric's *Living Masterpiece* by AMV BBDO in January 2012 to exhibit GE's commitment to reducing the National Gallery's carbon footprint (BBDO, 2013b).

What OE can learn from BBDO is the great leverage of O&M's brand reputation and successful client works and awards. It is sensible for OE to claim its works done in corporation with O&M. This can make OE become more visible in advertising space and more credible in wider public sphere.

6.5.2 Y&R

Y&R can be seen as an advertising agency who walks the talks. When renovating its office is San Francisco, it asked Interior Architects to design for sustainability (IA, 2013). In addition, Trish Wheaton, a leading 'Sustainability Navigators' at WPP (Wheaton, 2013) is currently holding leadership role at both Wunderman and Y&R. She is a remarkable spokesperson for Y&R in the field of sustainability. Trish also leads the sustainability talk at Cannes 2013 (Cannes Lions, 2013) which gives a good image and credit of how the agency cares and knows about sustainability area. Contradictorily, the Y&R Study in June 2013 reveals that American consumers are not swayed by brand's green message and not buying brands' sustainability claims (Campaign Brief, 2013).

Y&R produces a number of ads that address social and environment issues. These include, for example, Y&R Cape Town promote the daily hygiene by putting toys in bars of soap to teach kids how significant it is to wash their hands (YR, 2013) and Surfrider Foundation's The Glove campaign to visually stress that the beach doesn't clean itself (Ad Forum, 2013). Y&R does not mention anything about its sustainability team on its websites. The prominent related blogs are those written on Y&R South Africa website.

What OE can learn from Y&R is that it is important to get Kathleen out there and be vocal. Kathleen has a great career history and success hence that can be a selling point of OE and can help OE be known. If Kathleen becomes more popular and more well-known, her good reputation will be attached to OE which will help OE accelerate the growth faster. The only concern is that the tight relationship between Kathleen Enright and OE UK brand reputation can cause OE to tremble down without the lead or presence of her in the future.

6.5.3 DRAFT FCB

This is a great advertising agency with very chic, catchy, stylish, functional and practical website showcasing a grand list of awards and a selective list of clients. It claims working with more than 100 companies in the Global Fortune 500 (Draft FCB, 2013a). It won 9 Gold, 12 Silver, 14 Bronze and a Cannes Grand Prix at Cannes 2013. NIVEA SolarAd Charger in Brazil (Draft FCB, 2013b) is a good example of how the agency integrates brand message to environment and lifestyle. Also, by partnering with BPN, Draft FCB creates billboard that produces drinking water in Lima (in Peru), the world's second largest desert capital (Interpublic, 2013). This advertisement leads Mayo Peru DraftFCB to win the Gravity Award, the top honour at 2013 AdWeek Project Isaac (Adweek, 2013).

DraftFCB also writes blogs on sustainability and Social Responsibility (SR). Interestingly, its sustainability blog stopped in June 2011 while its Social Responsibility blog is written approximately once every two months and the last post was in August 2013. It does not mention anything about sustainability expertise or team.

DraftFCB may possibly be able to get OE to think if sustainability is still the word and the place to play. Why did DraftFCB stop posting on sustainability blog since 2 years ago while it still makes some efforts on SR?

6.5.4 Publicis Groupe & Saatchi & Saatchi S

After being founded in 1998, Act Now Productions, the sustainability consultancy who helps business solves the world's depressing problems, was bought by Publicis Groupe and renamed to **Saatchi & Saatchi S** (Environmental Leader, 2008; Saatchi S, 2013a). Sustainability communications is named one of the Publicis Groupe's offerings by its specialised agencies (WEForum, 2013).

At Saatchi & Saatchi S, it aims to make sustainability irresistible (Saatchi S, 2013b) with the 3 focuses on strategy, engagement and communication. Aside from building a beautiful website, Saatchi S also writes a lot of thought leadership pieces on sustainability. Its clients are in wide range of industries and are leaders in their own field such as Coca-Cola, Intel, McDonalds', P&G, and Walmart. The teams are based in both San Francisco (HQ) and London. On Twitter, Saatchi S is posting approximately one message a day (Ref.Twitter)

Saatchi & Saatchi S might be **a good sign for OE** to keep its unit and persist to grow the team. However, it is also doubtful whether Saatchi & Saatchi S really makes money out of the sustainability expertise. Many links to its client works on its website are disabled or no longer valid.

6.6 MIXED AND OTHERS

During the research, there are a few players who also share the pie in sustainability communications. As they cannot be specified in niche, public relations, nor advertising, the paper classifies them into the 4th category: Mixed and Others. They may not possibly become OE's strong competitors, yet they are worth being mentioned and studied further for OE to be aware of what they do and offer.

6.6.1 SalterBaxter

Although **SalterBaxter** claims to be increasingly seen as one of today's European leading sustainability consultancies (SalterBaxter, 2013a), its offerings are mixed between business strategy, sustainability and creative communications. 55 per cent of its works are delivered in digital form (SalterBaxter, 2013b). Its strength seems to be writing and reporting expertise. It is in its fourth year of helping big account like Adidas reporting its sustainability performance and SalterBaxter itself has also published the Directions Reports for over ten years, featuring trends and issues in sustainability. Its weakness is unfortunately the abbreviation of the name which happens to be the same with similar design as that of Sustainable Brands (SB).

What OE can learn from SalterBaxter is from its 'what we do' and its 'work' sections whose contents almost tally except for the fact that it adds 'operating responsibly' into 'what we do'. This gives a sign of how much it cares about being responsible. This is then a good example that OE can apply as walking the talk has been proved important in order to get more clients or at least not to get attacked. Since OE UK has done quite a lot of green activities under the roof of Ogilvy Group UK, it can and should address these activities to make its clients aware and realise that OE does as much as it talks or in its present case, OE talks as much as it does.

6.6.2 The Hunting Dynasty

The Hunting Dynasty positions itself as expert in behavioural change by psychologically inform communications. Its strength is its people who, from their background, can contribute directly to what the brand promises (HuntingDynasty, 2013a). Jamie Romain also moved from OgilvyOne to The Hunting Dynasty as Creative Director. The Hunting Dynasty might not be a current direct competitor to OE, yet the possibility might rise if OE partners with #OgilvyChange (OgilvyChange, 2013) or OgilvyOne in a client's project as both agencies' characters and product offerings resembles those of The Hunting Dynasty. The Hunting Dynasty's website is also very disruptive and dashing, filled with questions that brief what its projects are all about.

What OE can learn from it is an interesting use of 'Pay with a Tweet' and 'Pay with a Facebook Post' function which is linked to its publications on '*Inspiring Sustainable Behaviour: 19 ways to ask for change.*' This is the only book that it has on its publications section on the website which provides a link to buy the book from Amazon or to download it for free with the above functions. Interestingly, Rory Sutherland, Vice Chairman of Ogilvy & Mather UK, also gives testimonial to this book (HuntingDynasty, 2013b).

6.6.3 Institute for Sustainable Communication (ISC)

As one of OE UK's aspirations and considerations is to produce more pro-bono works, there are possibilities to tap into extended partnership with non-profit organisations (NGOs) and government bodies and hence **Institute for Sustainable Communication (ISC)** can possibly be its competitor. This organisation is non-profit itself and aims to help promote the sustainability via print and digital media (ISC, 2013). Yet, as its deliverables are limited to only two main medium, it will not have the same capability to deliver the work as the same level as OE.

6.7 SUMMARY FOR CHAPTER 6

With Google and Bing search on sustainability related terminologies, OE did not come up on any first page of the search results. Although it might seem surprising as OE UK defines itself as sustainability marketing communications practice which already covers popular sustainability-related search terms such as 'sustainability marketing' and 'sustainability practice(s)', it is indeed sensible by having learnt that OE UK currently does not have any active online channel to connect with its stakeholders. From the research, it is obvious that all of its leading competitors, both direct and indirect, have at least a decent website with up-to-date information. Although website itself is not a proactive form of bringing more clients in, it acts as a hygiene factor that every good agency should have in order to showcase its works and to build up its credibility especially the first impression.

From a face-to-face interview with Piers Knuckey, the WPP's Sustainability Manager, on 21 August 2013 at Canary Wharf office, his unfavourable message could be a good sign for OE to request for more budget and headcount in order to perform better on the online platform or at least to have some control over the current website which is own by the NY team. He stated that after having a look at OE's website a few times, nothing has changed. It is static. It is outdated. And it does not give any hint that the agency is thriving or growing at all. However, on a positive note, Piers is willing to connect OE to WPP if OE can put together a good proposal showing how it wants and can partner with WPP who in fact has established a long-term relationship with Context, an agency outside WPP Group, in doing its sustainability projects.

To generalise the best practices from the research findings, everyone is moving into the online platform both in terms of communications and product offerings. Digital and social media trends will definitely play a big part in shaping the world of marketing communications. While the competition is fierce with big agencies stretching their arms towards sustainability area and the small boutiques cutting down their prices and offering new fresh ideas to clients, OE needs to be clear on its positioning and trying to move towards the top-right corner of the perceptual map. The best and most effective way to do is to immediately establish a strong connection with Ogilvy Group and make sure that the message is also sent across to the clients. This will increase awareness and trust in its clients which seem to be what OE UK needs to create as soon as it can.

CHAPTER 7: CONCLUSION AND RECOMMENDATIONS

After having pulled and analysed all the findings in this research paper, this Chapter will give a clear and practical strategy recommendations built inside ***the strategy house*** (See: Figure 14).

The current industry and OE situation had been assessed. OE's vision was required to set the end goal to achieve. From discussion with the head of OE, OE aims to double its revenue from GBP200,000 to GBP400,000 by 2015 and prove itself a viable business unit of Ogilvy. This reflects the importance of revenue to OE's business. The majority of the costs such as salaries and administrative are fixed, therefore, it has to focus on revenue to make profit. The aim seems ambitious at first glance. However, OE has been performing under its full potential and it can be quickly turned around to generate more revenue and achieve its goal.

The recommendations can be divided into four strategic objectives and two supporting foundations. The strategic objectives are directed to key business areas of OE to drive revenue while the foundations are the key enablers that the strategic objectives have to build on. Within each objective and foundation, there are a few initiatives. To ensure the effectiveness of each strategy and initiative, measurements are introduced under the philosophy "what gets measured gets done" (Williamson, 2006). Measurements also show causality of how each strategy generate business results.

Figure 14 depicts the strategy house, showing visions supported by strategic objectives pillars and the foundations. Figures 15 & 16 show the detailed action plans associated with each strategy and selected initiatives.

Figure 14: The Strategy House

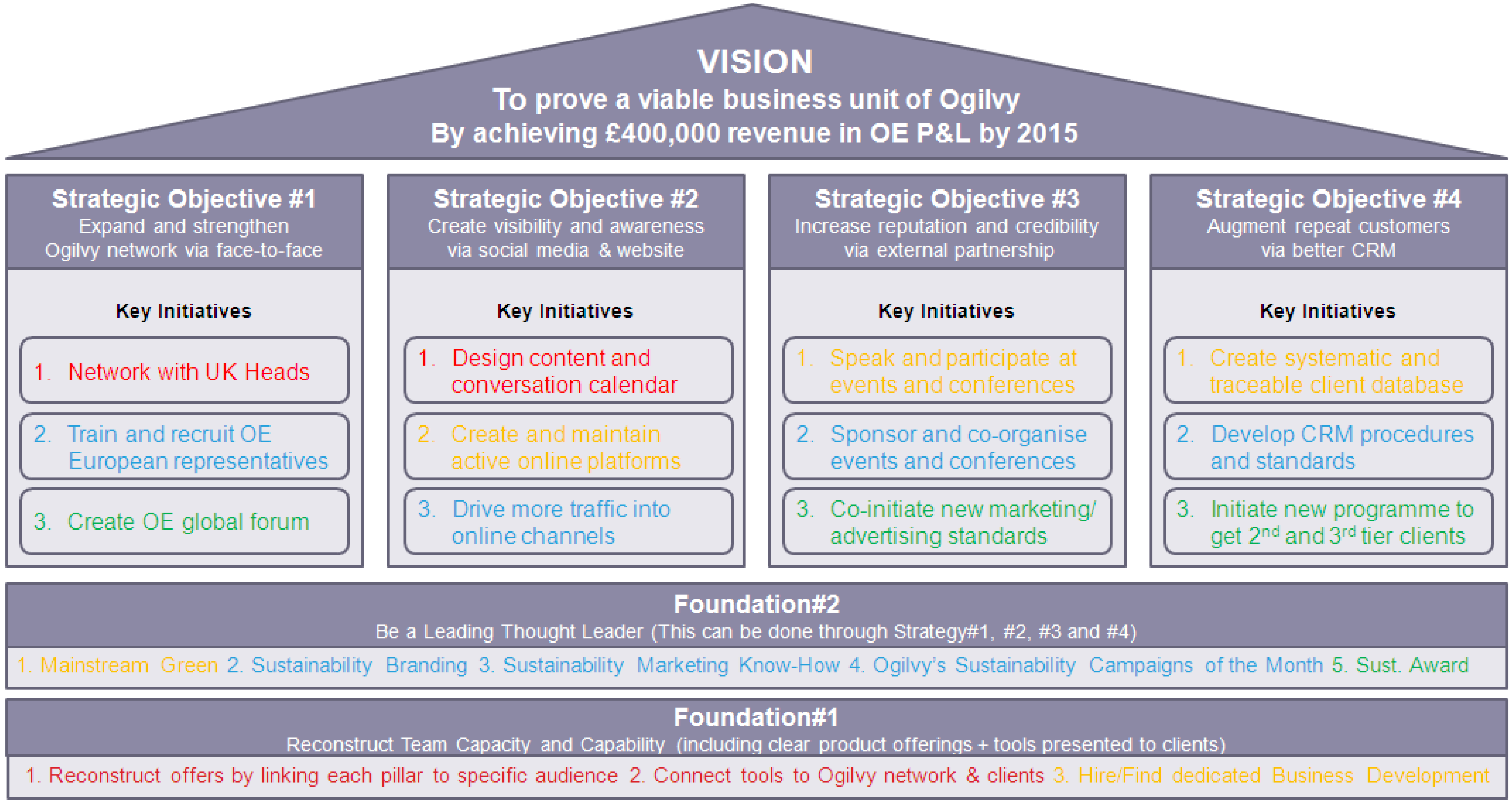


Figure 15: Immediate to Short-Term Strategy Execution (1/2)

Immediate & Short-Term Strategy Execution

Strategy	Strategic Measurement	Initiative	Initiative Measurement	Key Actions	Detailed Actions	Start Date	Complete Date	Person in Charge
Strategic Objective #1 Expand & strengthen Ogilvy network via face-to-face	Revenue from Ogilvy's referred projects increased by **50%** by 1H14	Network with UK Heads	1 official meeting per month	Organise Head of Practice dinner	Identify key persons and co-invite with OPR Head	Mon 02 Sep 13	Fri 06 Sep 13	Kathleen
					Organise dinner	By 30 Sep 13	On going	Kathleen
			2 unofficial meetings per month	Initiate meetings with other Heads	Meet new business Group Director	Mon 09 Sep 13	Fri 21 Sep 13	Kathleen
					Meet Neil Hawke	Mon 23 Sep 13	Fri 27 Sep 13	Kathleen
Strategic Objective #2 Create visibility and awareness via social media & website	Total number of follower/share/like increased by **100%** year-on-year	Design content and conversation calendar	A complete cross-platforms content and calendar for 2013-14	Learn from the expert	Talk to @Social on how to create calendar for TW, FB, LinkedIn, YT	Mon 02 Sep 13	Fri 06 Sep 13	Harriet
				Create database & online platforms	Design topics and find content	Mon 09 Sep 13	Fri 21 Sep 13	Harriet
					Gather all sust-related clips by Ogilvy Europe	Tue 01 Oct 13	Fri 05 Oct 13	TBA
					Launch new-face on TW, LK, YT & brand-new FB, Website, Wiki	Tue 01 Oct 13	Mon 02 Dec 13	TBA
		Create and maintain active online platforms	1 Tweet 1 FB post p.d. 1 YouTube Clip p.w. 1 Blog p.m.	Assign & explain responsibility & make clear expectation	Go through content calendar and have constant discussion	Tue 01 Oct 13	On going	Kathleen
			100% web update on client work at mth end	Spend 15%* of total working time on this	Keep up-to-date with OE teams for new client works & keep in touch w/ clip providers	Tue 01 Oct 13	On going	TBA

Abbreviation Note:
p.d. = per day
p.w. = per week
p.m. = per month

* (15/100)x7.5 = ~1 hour/day

Yammy's MBA Summer Project 2013

Ogilvy earth

Figure 16: : Immediate to Short-Term Strategy Execution (2/2)

Immediate & Short-Term Strategy Execution (cont.)

Strategy	Strategic Measurement	Initiative	Initiative Measurement	Key Actions	Detailed Actions	Start Date	Complete Date	Person in Charge
Strategic Objective #3 Increase reputation and credibility via external partnership	New clients approach OE: 2 times p.m., by 2H14	Speak and participate at events and conferences in Europe	2 public speech and/or event attendance p.m.	Partner with marketing and sustainability organisations	List out events / conference & justify reasons to go	Mon 09 Sep 13	On going: Every 2nd & 4th Mon of month	Harriet
					Speak at and/or attend events/ conferences	Tue 01 Oct 13	On going	Kathleen
					Propose new partnership opportunities	Fri 04 Oct 13	On going: Every 1st Fri of month	TBA
		Write and publish OE article in partner's website ***(Optional)***	1 article per month	Write and lobby	Align topic with conversation calendar and write new article	By 15 Oct 13	On going	Ollie
					Lobby our partner to publish OE article	By 30 Oct 13	On going	Ollie
Strategic Objective #4 Augment repeat customers via better CRM	1 new business lead from repeat client p.m., by 2H14	Create systematic and traceable client database	100% complete list to be reviewed every Quarter	Complete OE client database	Re-organise OE shared folders & keep all new business in 1	Fri 01 Nov 13	Fri 08 Nov 13	TBA
					Create database	Fri 01 Nov 13	Fri 08 Nov 13	TBA
					Classify & prioritise clients on the list	Mon 11 Nov 13	Fri 15 Nov 13	Kathleen
					Send e-card X'Mas greetings to all clients	Mon 10 Dec 13	Fri 14 Dec 13	TBA
				Evaluate & make OE's prospect client database based on Ogilvy network clients	Make a list from observation and informal interview	Jan 2014	On going	TBA

Abbreviation Note:
p.y. = per year
1H = first half
2H = second half

Yammy's MBA Summer Project 2013

Ogilvy earth

The first strategic objective is to expand and strengthen Ogilvy network via face-to-face. The measurement of the first strategy's success is 50% increase in revenue of Ogilvy's referred project. This strategy targets potential clients within Ogilvy network. The rationale behind this objective is to exploit OE's strength in its affiliation with Ogilvy. OE can also significantly reduce the power of complements and suppliers. Other Ogilvy teams have much larger client base and can provide more business leads for OE. They can provide complement service in terms of marketing plan execution, which enhance OE's competitiveness. OE can reduce potential client's searching costs and internal coordination by adjusting its message to appeal to clients in marketing department, Ogilvy's natural client base. Three initiatives are under this strategic objective: network with UK heads of practices, train and recruit OE European representation and create OE global forum. This represents three stages of expanding client base from UK to Europe and global.

The second strategic objective, creating visibility and awareness via social media & website, aim to solve OE's weakness in communications. It also aims to reduce client's search costs by exploiting trends in online media and attracts new clients. The initiatives are geared to gain as much online exposure as possible from content design, active engagement, and drive traffic. The ultimate goal is to have an interactive online platform that OE can communicate with its potential clients. In addition, the online platform can be a show case of OE's expertise, enhancing the image. It can also attract potential candidate to expand OE's operation as well. The short term measurement of this strategy is total number of followers/shares/likes increase 100% YoY. Given the current state of OE's online presence, building content to generate more awareness and network is more urgent than trying to win a client.

The third strategic objective is to increase reputation and credibility via external partnership in order to target potential clients who already had exposures or willing to do sustainability. OE can leverage its opportunity to enhance its reputation, a key differentiation of this industry. This helps reduce powers of rivals and threats of new entrants. Substitute's power is also subdued as OE reinforces its image of expertise by involving with sustainability associations and conferences. In addition, it can expand its client base to those who are already interested and reduce business lead supplier's power by augmenting its own business development capability. OE SF is successful at attending event and conferences and builds its network of potential client. Again the initiatives start by attending the events before moving on to become events' sponsors and organisers and eventually becoming an accepted authority of the industry. This strategy should be measured by number of new business leads from clients that approach OE at conferences and events. The target is at two leads per month by 2H14. This is an appropriate measurement of OE's effectiveness of participating at events and conferences.

The last strategy objective is to augment repeating customer via CRM of existing OE customers. This objective is to reduce search costs for both the clients and OE and reduce supplier's power over the industry. OE's ties its future with the number of clients in pipeline. By implementing CRM, OE can keep its client in touch and be on their top of mind. The underlying hypothesis for this strategy is that OE has the capability to deliver satisfying results to keep the clients coming back. The initiatives under this strategy start from building client database and CRM procedure. The ultimate goal is to increase loyalty and referrals to new potentials connections through existing client's network. The measure of success of this strategy is one new business lead from existing client per month.

To support the strategies, the first foundation is reconstruction of team capability and capacity. The OE team itself had the capability and its offerings were competitive. Nevertheless, OE has to think of its offerings from the client's perspectives. OE's current service categories were based on OE's expertise. As a result, its client could not relate to the service. By restructuring its service categories, OE can approach clients in different business function and offer the service packages that suit their needs instead of offering them a good package that require internal coordination with other functions. The underlying assumption was each department only had budget to support its own activities. The package that spanned across different functions would require more time and consideration to get approved. Targeted service package that focus on clear and obvious business needs can expand OE's work to other functions as well as reducing client's search costs.

The other two initiatives within the first foundation are connecting the tools to OE network and client and find dedicated business development resource. By leveraging Ogilvy's toolset and previous client works, OE can build credibility and reinforce its value proposition that it is a part of Ogilvy. In addition, finding dedicate d business development resource can improve OE's revenue stream and running time. Without clear business development responsibility, the function was neglected during busy time, resulting in lack of pipeline and down time. By setting a clear ownership and responsibility of business development, OE can maintain client work pipeline and gain more revenues. The suggested measurement for this strategy can be client rating, internal performance appraisals or revenue per available man-hour. Each measure the capability of OE team in different ways but is equally valid.

The other foundation is to become a thought leader. Thought leadership helps build OE reputation and credibility, which are important to win clients. There are several existing materials that OE can use to demonstrate its thought leadership. It conducted extensive research on mainstream green, sustainability branding and marketing. These researches can be communicated through Ogilvy network, online media, conference or CRM material. OE can also create its sustainability campaign of the month and sustainability award to enhance its image and build more awareness. The measurement of this foundation is number of citation/link to OE's articles and media coverage. When people start quoting OE's frameworks and thoughts, it is implied that OE has become a thought leadership.

With the growing trend in sustainability, the attempts to link it to financial gains, the proof of more sustainability spending in various sectors and the capable resource and global creative network that OE possesses and can leverage, there is definitely a strong growth opportunity for OE UK to capture and enjoy. Together with the strategic and measurable plans, not too long from now, ***OE UK will be grown from the little seed to the big strong plant.***

The next last Chapter of this research paper will discuss some limitations and possible future researches.

CHAPTER 8: FURTHER DISCUSSION

8.1 LIMITATIONS

There were a few limitations in conducting this research; a lot of which were caused by limited timeframe. The research first started on the 8th May when the author set up the first meeting with Kathleen Enright in London. However, it was also the time of finalising which project to be taken. The real starting point hence became the beginning of July when the author commenced the Work Experience Programme with OE team. This left the author with only 2 months to rigorously conduct the research, analyse the findings, present the deliverables to OE, and finish this research report.

When the time was running up, the author decided to request to focus on writing this research and step out from any client works. However, the past experience in being involved in client works with the team was useful to help interpret the team behaviour and observe how OE conducts its business.

With the very busy schedule of heads of each OE and different locations in different regions, the face-to-face interview was only conducted with UK team, while telephone interview was done with NY and SF teams. In order to acquire the necessary data from South Africa and Australia office, the email correspondence including simple questionnaires were used when the possibility to set up an interview became scarce.

During the past 2 months, there were also constant IT problems with the author's office laptop, consuming approximately a day per week to fix; mostly about the network connection. This disabled the ability to concentrate and work with full efficiency. However, support was always given by OE team and wider Ogilvy's colleagues.

With a better planning and more experience, the author could have set proper interview with all OE teams as well as OE's potential partners and clients. Yet, with all the limitations, the research was still conducted with the standard to deliver the best result possible.

8.2 FUTURE RESEARCH

Future research can be done in extension of this research paper by approaching the subject differently. For example, one can approach competitor analysis from purely outstanding campaigns from various medium and review which agencies made them and when the campaigns were launched. By putting timeline into consideration, the research will be able to see the trends of each agency and the campaigns. This can also reflect what people were concerned the most over a certain period of time and can help predict what will be the next best thing in the campaign.

Interview with the competitors and their clients to get more insights and to perform deeper analysis on competitor analysis can be useful. Also, after having a list of potential clients, a meeting and an interview with those clients to learn more about what they are looking for when hiring a new sustainability marketing communications agency to work for them. This may include a comparative view on creative agency and management consulting firms providing similar sustainability-related products and services.

A research on thought leadership trends can also be interesting. This will help the agency to see what is out there and what is missing. It also gives 2 sorts of opportunities. One is to become a mainstream by riding on with the trends or the other is to find gap and be the trend leader in the market.

“The way to gain good reputation is to endeavour to be what you desire to appear”

– *Socrates*

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