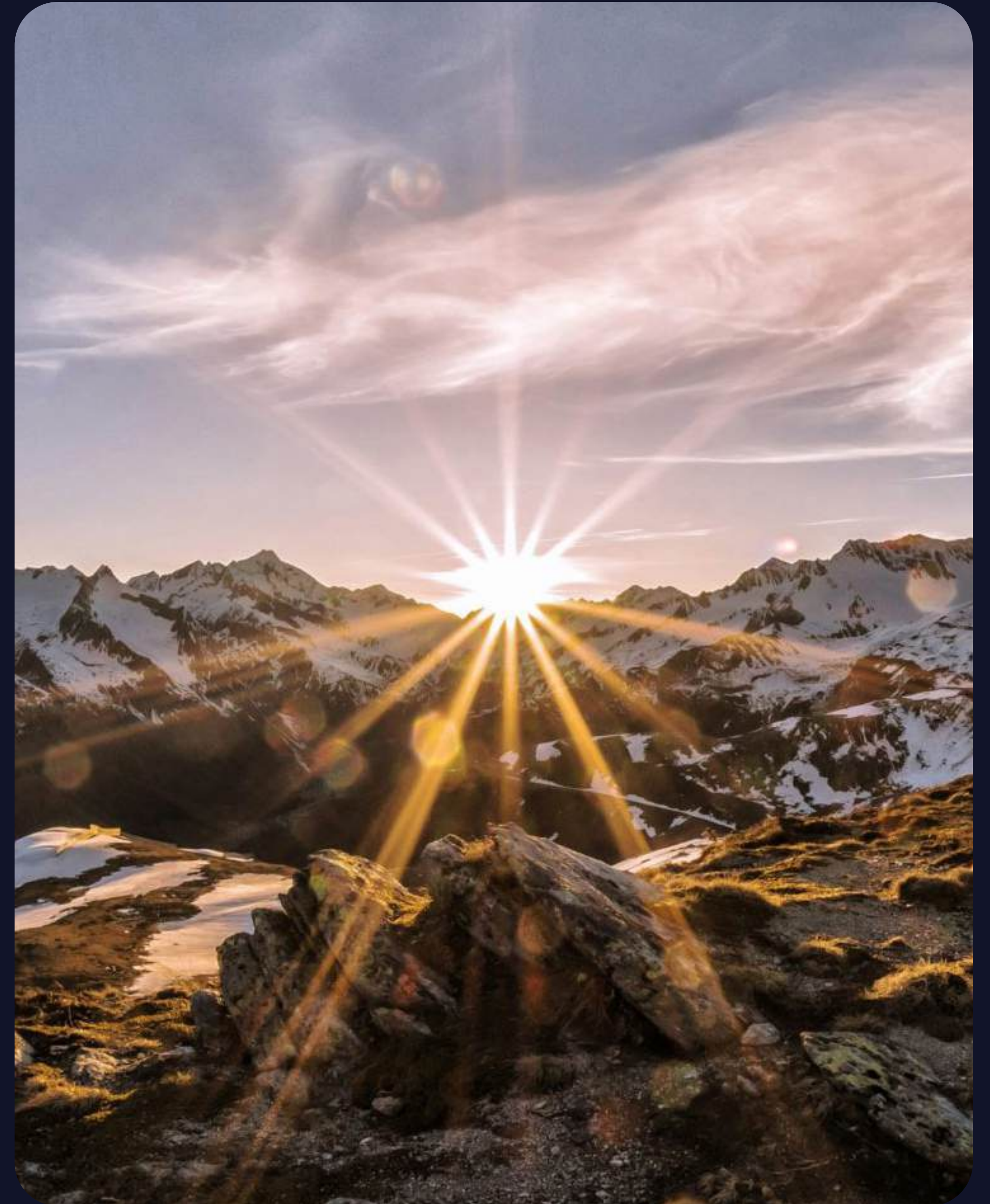


Ad Net Zero Progress Report **2024**



Compliance

Ad Net Zero is an international, cross-industry coalition of businesses aimed at decarbonising advertising supply chains and encouraging growth of advertising that drives more sustainable choices and behaviours.

It represents the interests of the advertising industry. It acts as a forum for legitimate contacts between supporters of the advertising industry. It is the policy of Ad Net Zero that it will not be used by any company, industry grouping or individuals to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rules or directives of any country, or otherwise impair full and fair competition.

Supporters acknowledge that being a supporter of Ad Net Zero is subject to the competition law rules and they agree to comply fully with those laws. Supporters agree that they will not use Ad Net Zero, directly or indirectly, (a) to reach or attempt to reach agreements or understandings with one or more of their competitors; (b) to obtain or attempt to obtain, or exchange or attempt to exchange, confidential or proprietary information regarding any other company other than in the context of a bona fide business; (c) to further any anti-competitive or collusive conduct; or (d) to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition.



Foreword

It is with mixed emotions that I write this foreword to the second Annual Progress Report. There has been a step up in effort and delivery during the year to report. Throughout the report there are examples of decarbonizing the way the industry works, and others that show how brands reframe and accelerate the uptake of more sustainable products and services. However, the impact of all the effort is not yet enough.

This year the overwhelming majority of supporters have set, or are completing the setting of, their Paris-aligned net zero and near-term reduction targets.

However, the industry is showing that it is ill prepared for what follows the imminent regulations for disclosure and reporting in major markets. Those companies who are not actively and significantly reducing their carbon footprint will find themselves with nothing positive to disclose in public reports.

We are here to help. We now have active teams and affiliated chapters covering over half the global advertising market to help the industry be an agent of change in the transition to a net zero economy. We now have voluntary standards and frameworks in progress or ready for use across all five actions. The most substantive so far is the Ad Net Zero Global Media Sustainability Framework (GMSF). We have also made available some valuable voluntary partnerships to our supporters, with thanks to Green Element, AdGreen, and isla. All of this to accelerate the decarbonisation of the advertising supply chain. We are also testing a new approach to encouraging more sustainable behaviours in advertising, which you can read about in further detail below.

But let's be clear. Substantial real-world absolute emission reductions in line with the Paris agreement during this decade will be non-negotiable to secure any business a place in the economy of the future with better, which is decarbonised, growth. That takes leadership right now.



Sebastian Munden
Chair of the Global Board

Key Findings

- The majority of Ad Net Zero supporters have now set public science-based reduction targets, or are working towards them. That includes 89% of UK supporters and 73% of US supporters. By company type, advertisers and large-scale tech platforms within the Ad Net Zero supporter base lead the way in science-based target setting, with 100% of both advertisers and large-scale tech platforms having reduction targets, or demonstrating that they are working towards them.
- The global group demonstrated a drop in absolute emissions by 1.7%. However, Ad Net Zero warns that this does not indicate a peak in emissions across the group. Full scopes 1-3 reporting is inconsistent across the supporter base, and at times lacks the disclosure of accompanying strategies that prove a company has an adequate roadmap to achieve its reduction targets.
- 59% of the global group are already engaging their suppliers to reduce production emissions, compared to 25% in the UK (of those surveyed), with much lower disclosure around media and event supplier engagement. We recommend supporters engage up and down their value chain to install robust, scopes 1-3 reduction strategies.
- Ad Net Zero continues to release new voluntary tools, resources and training to support those businesses who wish to future-proof their business and prepare to compete in the net zero economy. In particular, the next wave of the Ad Net Zero Global Media Sustainability Framework will be released in Q2 2025, along with, soon after, findings from Ad Net Zero's *Every Brief Counts* pilot, bringing with them the next set of science-based, user-friendly resources to help the industry meet, then raise, its climate ambitions.
- Finally, the global picture is rapidly expanding, with UAE, the Europe Hub and Australia launching this year, and initial figures coming out of Ireland and Aotearoa (New Zealand). As we embed across these territories, now representing over 50% of global ad spend, we hope to support the industry in creating the outcomes necessary to achieve *better growth*.



The Urgency of Now, Kim Dirckx



Kim is the Global Head of Digital Sustainability, Strategic Partnerships and Open Innovation at L'Oréal and Chair of Ad Net Zero Charter Steering Group (CSG). The CSG have a principal role in strategy, direction, and industry influence.

I am honored to be appointed the inaugural Chair of Ad Net Zero's Charter Steering Group, leading the charge toward accelerated climate action within the advertising industry.

This report serves as a critical tool for engaging all stakeholders across the global advertising landscape. By providing a benchmark against peers, geographies, scientific data, and the wider industry, it empowers organizations at all stages of their sustainability journey to take stock, identify areas for improvement, and accelerate their climate action strategies. While sustainability in advertising, especially the digital space, is still in its nascent stages, the five-step action plan provides a concrete framework for companies to achieve meaningful decarbonization. At L'Oréal, our L'Oréal for the Future program aligns perfectly with these five actions, demonstrating our commitment to leading by example.

On Action 1, we are transforming the company's business model to respect planetary boundaries and contributing to solving the world's challenges, with a commitment to reduce our emissions by 48% by 2030, and 90% by 2050. We strongly believe that progress in sustainability needs to be grounded in science, and have been dedicated to the Science Based Targets initiative (SBTi) since 2015, renewing our commitment at the end of 2023 (Action 1).

For Action 2, we are measuring and reducing the carbon footprint of our major advertising productions with AdGreen, in collaboration with our content production agencies. For 3, we utilise IMPACT+ to measure 100% of our digital media campaigns across all markets, ensuring complete transparency and accountability and the development of levers for reduction. For 4, we actively engage with initiatives such as events and awards (Campaign Ad Net Zero Awards), that are focused on reducing emissions. And finally, we aim to leverage the power of our advertising reach to promote sustainable consumption among our consumers, with internal targets dedicated to increasing our media spend on sustainability-focused messaging.

This report highlights the strides we've made as an industry, but also underscores the urgent need to accelerate our efforts. Greater collaboration across the supply chain, increased thought leadership, and broader participation are essential to driving meaningful change, staying ahead of emerging regulations, and preparing for a net-zero economy. I invite all stakeholders to join us in this crucial endeavor.



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How to use this report

This is the next chapter of the advertising industry’s climate action, told using Ad Net Zero’s supporter data, and viewed through the lens of our five-point action plan.

Throughout this report, we’ve offered a range of foundational, common-sense and competitive ideas to equip the industry with best practices at every stage of their climate journey.

It can be used by:

1. Advertising professionals looking to understand the state of the industry, their own role in it, and to take inspiration from the best practices of those changing the way they work and the work they make.
2. Marketers and brands wishing to leverage the industry’s skills and abilities to drive *better* growth for their company.
3. Any state or non-state actor aiming to understand how the industry could serve as a vital partner for their own sustainability goals.

A NOTE ON TERMINOLOGY AND DATA

This year, we have seen progress in reporting across our base, and the introduction of the Ad Net Zero Foundational Pathway – a step-by-step survey and guide for supporters across our action plan. As a result, the amount of data we’ve been able to include in this year’s report has increased compared with last year.

The key figures in this report have been anonymised and aggregated from a variety of publicly available sources, engagement and the Ad Net Zero Foundational Pathway. Public sources include our supporters’ commitments on their websites, their Science Based Targets Initiative or CDP (formerly known as the Carbon Disclosure Project) submissions, and any publicly available company reports. Please note that in this report, holding companies, including their agency brands, count as one agency in the global figures. This data was collected from global supporter companies and other supporters based in the US, UK, Ireland and New Zealand, by the end of September 2024.





Part 1: Finding global solutions to a global problem

No more hot air.

“

We are half-way through a decade that requires all hands on deck to halve global greenhouse gas (GHG) emissions by 2030. Instead, we are going in the wrong direction, with emissions increasing, and the negative consequences of our inaction becoming clearer. Good intentions and commitment are not enough—even the recently released UNEP Emissions Gap Report 2024 is entitled *No more hot air...please!*

Fortunately, hope is in our hands! The ad sector can use its abilities to change behavior to accelerate the adoption of climate actions that are already proven and economically viable. As well as this, it can make up for lost time by working quickly to credibly and consistently estimate its operational emissions in line with established science-based standards used by the rest of the world and the Global Media Sustainability Framework (GMSF), all of which will facilitate the process. Getting the estimations right is increasingly a legal and business requirement. The hammer is coming, and it is in the hands of regulators, brand clients, investors, and employees. The good news is that the ad sector can set an inspiring pace of change both in reporting and in reducing operational emissions that can motivate other sectors.



Bill Wescott

Lead Climate Science and Policy Advisor,
Ad Net Zero

Remember these numbers

2.4°C -3.1°C

The current range of warming to expect from the world's current policies (the range published across UN Emissions Gap Report 2024, Climate Action Tracker and IEA Energy Outlook 2024)

42%

The percentage emissions decrease needed by 2030 to have hopes to limit warming to under 2°C, in line with the Paris Agreement. (UN Emissions Gap Report 2024)

1.3%

The percentage RISE in emissions in 2023. (UN Emissions Gap Report 2024)



A growing problem

Up until now, the advertising industry has been operating solely within a carbon-based economy. Over time it has grown in scale, complexity and its use of technology, such that advertising and its associated media ecosystem's carbon footprint is such that digital advertising alone is now estimated at around 4%¹. But it now has a choice. It can continue along a business-as-usual path within this economy, which a toughening regulatory environment will increasingly complicate over the rest of this critical decade. Or it can reposition itself. It can maintain its competitive and innovative edge, working in support of the next economy, one that decouples growth from consumption and helps businesses bring more sustainable products and services to customers in support of a sustainable future.

A better kind of growth

Ad Net Zero supports those businesses who wish to future-proof their business and prepare to compete in the net zero economy, with voluntary tools, resources and training. It's a pre-competitive coalition of national and international businesses and trade bodies, working to establish consistent, common-sense, competitive and credible solutions to help those businesses comply with regulation and the demands of their stakeholders and customers. Our supporter base includes leading international and national businesses throughout the advertising ecosystem, with 250+ organisations, ranging in size from global corporations to founder-led SMEs.

“

By engaging, educating and empowering the industry, we hope to see outcomes that are not only better for the planet, but are the catalysts for commercially exciting opportunities in the net zero economy.



John Osborn
Ad Net Zero US Managing Director

The Ad Net Zero five step action plan supports the industry to:

Transform the advertising supply chain:

ACTION 01

Reducing emissions from advertising business operations

ACTION 02

Reducing emissions from advertising production

ACTION 03

Reducing emissions from media planning & buying

ACTION 04

Reducing advertising emissions through awards and from events

Accelerate *better* growth:

ACTION 05

Using advertising's abilities to support more sustainable behaviours

1. <https://www.performancemarketingworld.com/article/1816040/carbon-emissions-digital-ads-fall-63-when-optimised-attention-time>





Part 2: Progress Against the Ad Net Zero five-point action plan



ACTION 1

Reduce emissions from advertising business operations

In June 2023, we asked all Ad Net Zero supporters, both at global and at a national level, to set public, science-based net zero targets. Since then, we have observed an increased move towards credible, science-based reduction targets, and a small drop in emissions in our global group (1.7%). It is too early to say whether that indicates a peak in absolute emissions (true, total emissions, as opposed to emissions intensity – which is volume of emissions attributed to each unit of production).

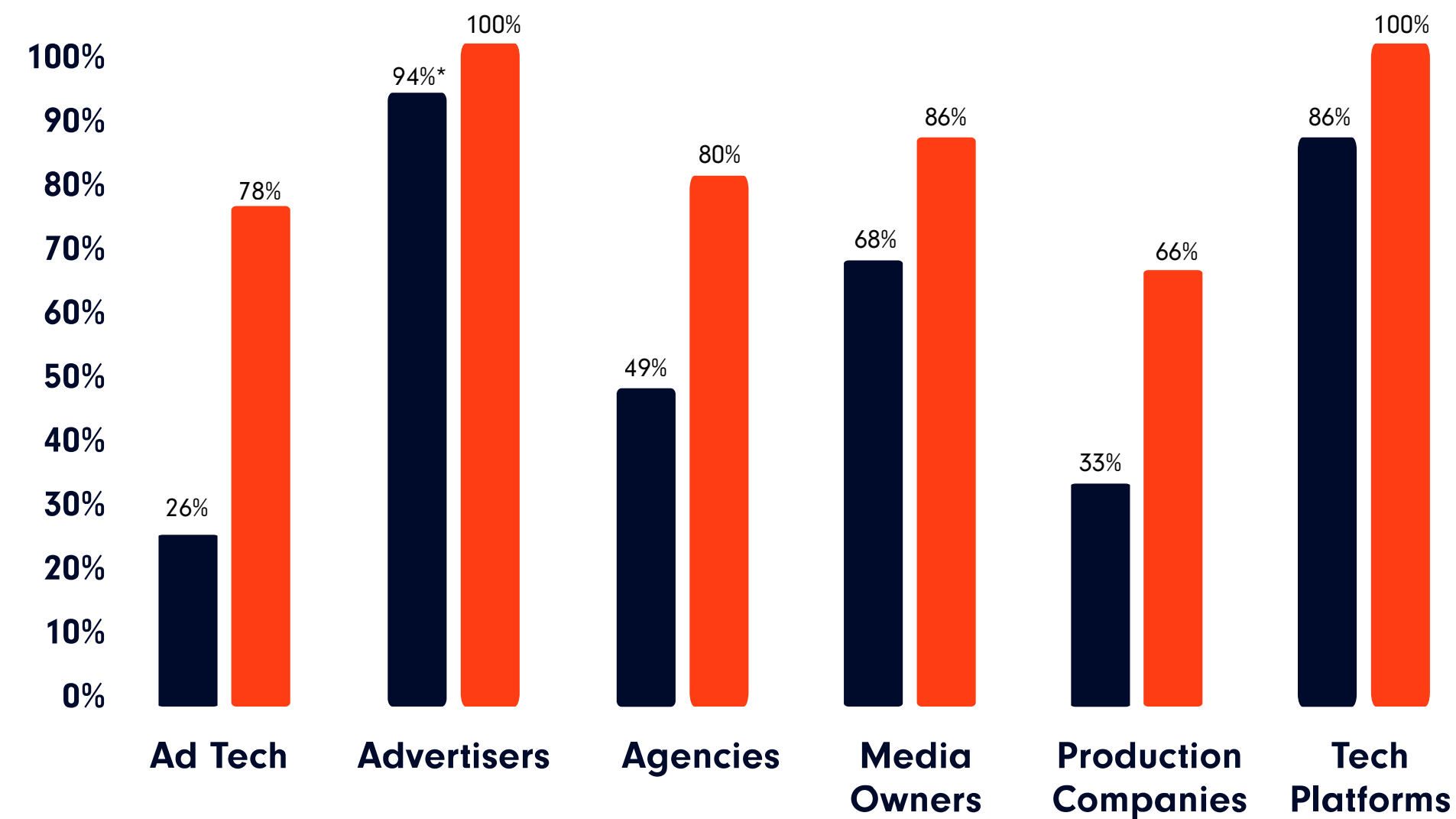
It's vital that companies set near-term reduction targets immediately, ones that are science-based and consistent with best practice, in order to set workable strategies to achieve real-world reductions. One concern arising from this data set is that reporting is inconsistent across companies in what should be included in each of scopes 1-3. We strongly encourage third-party verification of GHG emissions inventories, and third-party validation of science-based targets from widely recognized nonprofit authorities, as this will be the only way to safeguard companies against accusations of 'creative reporting'.

The below figures include those who have managed to secure a science-based reduction target, along with those who have been working hard to achieve this first step.

ACTION 01

FIG 1:
Target setting global picture by company type

- Who have set a reduction target
- Who have set a reduction target, or are working towards it.

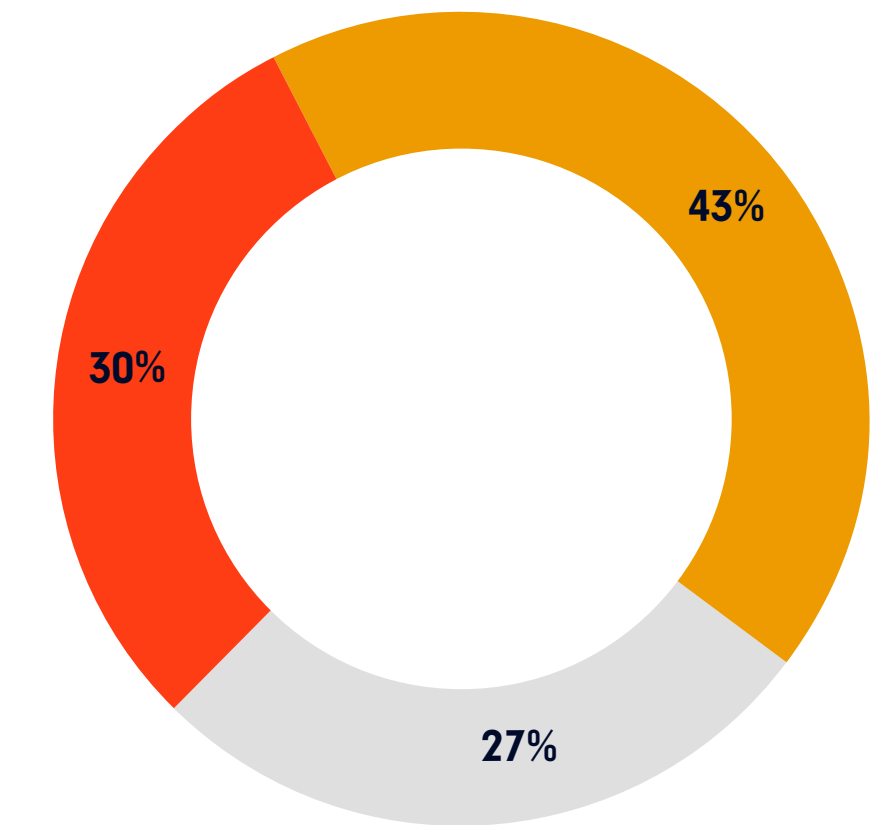


*100% of global group

FIG 2: REDUCTION TARGETS BY CORE CHAPTERS

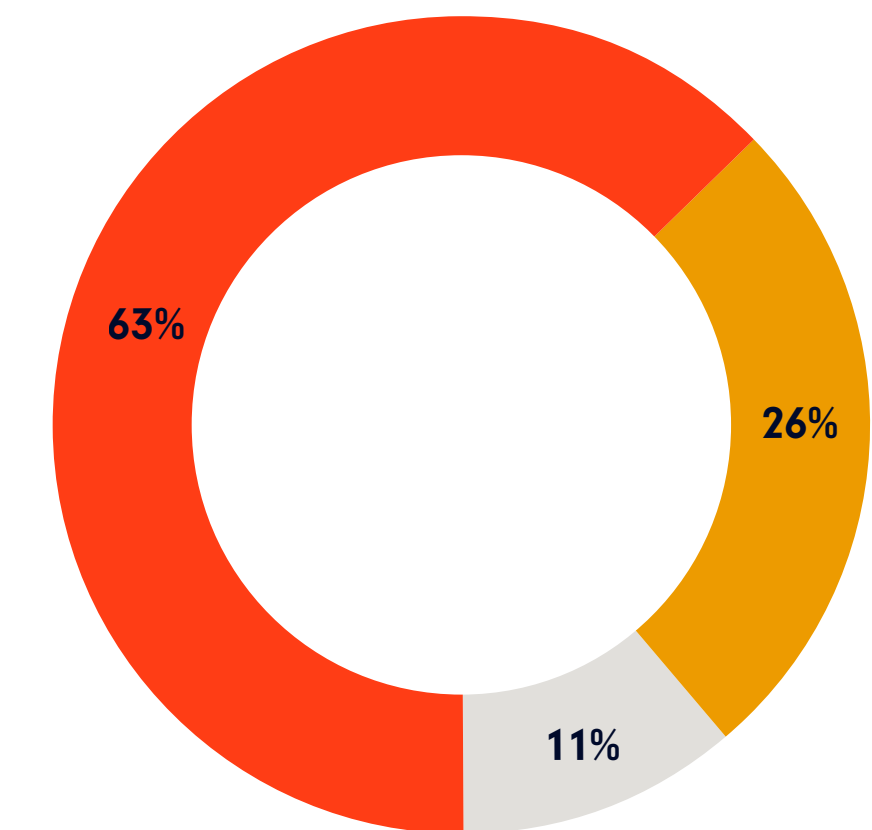
US supporter companies

- US Supporters with emission reduction targets
- US Supporters working towards reduction targets
- Undisclosed



UK supporter companies

- UK Supporters with emission reduction targets
- UK Supporters working towards reduction targets
- Undisclosed



ACTION 01

FIG 3: % OF SUSTAINABILITY TEAMS

Do you have a sustainability team in place?

95%

Of the Global Group have a sustainability team in place.

70%

Of the UK group have a sustainability team in place.

59%

Of the US group have a sustainability team in place.

FIG 4:

Do you have a low carbon travel policy?

82%

Of the Global Group have a low carbon travel policy.

60%

Of the UK group have a low carbon travel policy.

54%*

Of the US group have a low carbon travel policy

*NB: low number of responses

CASE STUDY



Low carbon travel policies – SeenThis

At SeenThis, we understand the importance of business travel for collaboration and innovation, but we also recognize the environmental impact it can have, especially when it comes to air travel. To strike a balance between these factors, and the financial cost of business travel, we adhere to the following guidelines:

- Necessity:** Before planning any trip, carefully assess its necessity and explore alternatives.
- Travelers:** Consider whether the presence of multiple employees on a trip is essential to meet business objectives.
- Consolidation:** Seek opportunities to consolidate meetings or events, as well as leisure travel, minimizing the number of separate trips taken.
- Safety First:** Ensure travel arrangements are safe.
- Go Economy:** For authorized air travel, travelling in Economy Class (Coach) is mandatory.
- Go Simple:** Hotels with a 5-star rating should not be booked as these include more amenities with a higher energy consumption resulting in higher emissions.
- Public transportation** should always be prioritized.



ACTION 01

A note on SMEs

Ad Net Zero's SME base is a large and vital part of our community, and a group that will increasingly need turnkey tools and resources to operate within a tougher regulatory environment.

As an example of our action, Ad Net Zero recently assisted the SME group with a set of voluntary inclusions for their supplier code of conduct documents, the learnings from which we will feed back into future Ad Net Zero resources. Watch this space for further resources.



Some baseline stats from our SMEs

36%

of the UK supporter base is an SME

67%

of UK SMEs have a sustainability team in place

52%

of the US supporter base is an SME

35%

of US SMEs have a sustainability team in place



ACTION 01

CASE STUDY



Mobilefuse: International Grand Prix Winner

Mobilefuse’s Employee Green Energy program empowers employees to combat climate change by helping them easily switch to renewable home energy sources, at no personal cost.

This innovative project offers support and financial reimbursement to staff who transition their personal home energy plans to green energy options. By incentivizing sustainable living, the initiative not only reduces the carbon footprint of the company, and of each participant, but also fosters a culture of environmental responsibility. The Program also serves as a common-sense, stealable blueprint that every other company can easily adopt.



CASE STUDY



Global

Last year, Global launched the outdoor Sustainability Initiative (OSI), a comprehensive decarbonisation strategy designed to streamline advertising processes and adopt more sustainable materials, to significantly reducing the carbon footprint of outdoor advertising.

Results:

- Reduced carbon footprint of bus boards by up to 19%, equating to an 1,000 tCO2e annual reduction.
- Increased recycling rate in Outdoor warehouses from 42% to 97% ahead of schedule and found recycling solutions for 87% of products.
- Project Bright Green (with TfL) will annually save 2.5million kWhs and associated carbon emissions.





ACTION 1

Essential next steps for the industry

Finish off setting targets...

Getting clear on what science-based is and what that means for your organisation. Targets are considered science-based if they align with the science to limit warming to well below 2°C.

See below for a clear timeline for CSRD (Corporate Sustainability Reporting Directive) compliance and get ready for it now.

Get going with...

Adopting a reporting and reducing cycle, reducing emissions year-on-year.

Get ahead by...

Engaging with your vendors to help each other comply with upcoming regulations, and in order to take responsibility for reporting on, and reducing, your entire scope 3 year-on-year.



Is the industry ready for regulations?

Two of the main milestones to get ready for January 2025:

EU: Corporate Sustainability Reporting Directive

The Corporate Sustainability Reporting Directive (CSRD) applies to any company doing business in the EU, and is being implemented along the following timeline²:



California: The Voluntary Carbon Market Disclosures Act

The Voluntary Carbon Market Disclosures Act is a new California law requiring companies to disclose details about [carbon offset projects](#)³

AB 1305, also known as the [Voluntary Carbon Market Disclosures Act](#) (VCMDA), regulates companies involved in the marketing, selling, and purchasing of voluntary carbon offsets (VCOs) in California. The law [defines VCOs as](#): “any product sold or marketed in the state that claims to be a ‘greenhouse gas emissions offset,’ a ‘voluntary emissions reduction,’ a ‘retail offset,’ or any like term, that connotes that the product represents or corresponds to a reduction in the amount of greenhouse gases present in the atmosphere or that prevents the emission of greenhouse gases into the atmosphere that would have otherwise been emitted.”

What this means is that any company making claims in the state regarding the achievement of net zero emissions, “carbon neutral” products, or similar climate claims, must disclose the full details of which on their website.

2. <https://ecochain.com/blog/csrd-esrs-eu-reporting-guidelines/#:~:text=%E2%82%AC20%20million.,Compliance%20Timeline,collection%20for%20reporting%20in%202029>. And <https://plana.earth/policy/corporate-sustainability-reporting-directive-csrd>

3. <https://www.persefoni.com/blog/ab-1305#:~:text=An%20example%20of%20a%20business,to%20make%20their%20first%20disclosures>





ACTION 2

Reduce Emissions from Advertising Production

Responses to the Foundational Pathway reveal there is currently low engagement with supply chains indicated across Actions 2-4, meaning agency/production company relationships are still operating along a business-as-usual pathway. Specific to Action 2, we are not yet seeing specific reduction targets in plans pertaining to production across the base in significant numbers regionally. As a result of CSRD and other regulations, we are seeing many larger, and therefore better-resourced companies already favouring suppliers who are on top of their measurement. We have also observed a large uptick in enquiries coming into Ad Net Zero on sustainability supply chain management and procurement.

ACTION 02

FIG 6

How well is the industry doing on their productions?

82%

of Global Group use a production calculator.

67%

of the UK group use a production calculator.

25%

of UK are already engaging their suppliers to reduce production emissions*

59%

of Global Group are already engaging their suppliers to reduce production emissions

*of those who have addressed the question publicly or in Foundational Pathway

CASE STUDY



Sky: UK Grand Prix Winner

Sky have aimed to launch the world's most sustainable studio, not only changing the way they work, but changing the work they make.

Examples of their work:

- Sports comedy series 'A League of Their Own' achieved a 47% emissions reduction, winning a Sustainable Production Award at the 2024 Global Production Awards, demonstrating the success of opting for travel by train in setting a new scalable standard.
- Virtual production on *Awesome Animals and Mini Me* reduced emissions from 15.62t CO2e to 6.78t CO2e.
- Sky's original film, *Robin and the Hoods*, switched to HVO Fuel, which could cut emissions by up to 90%, compared to diesel.



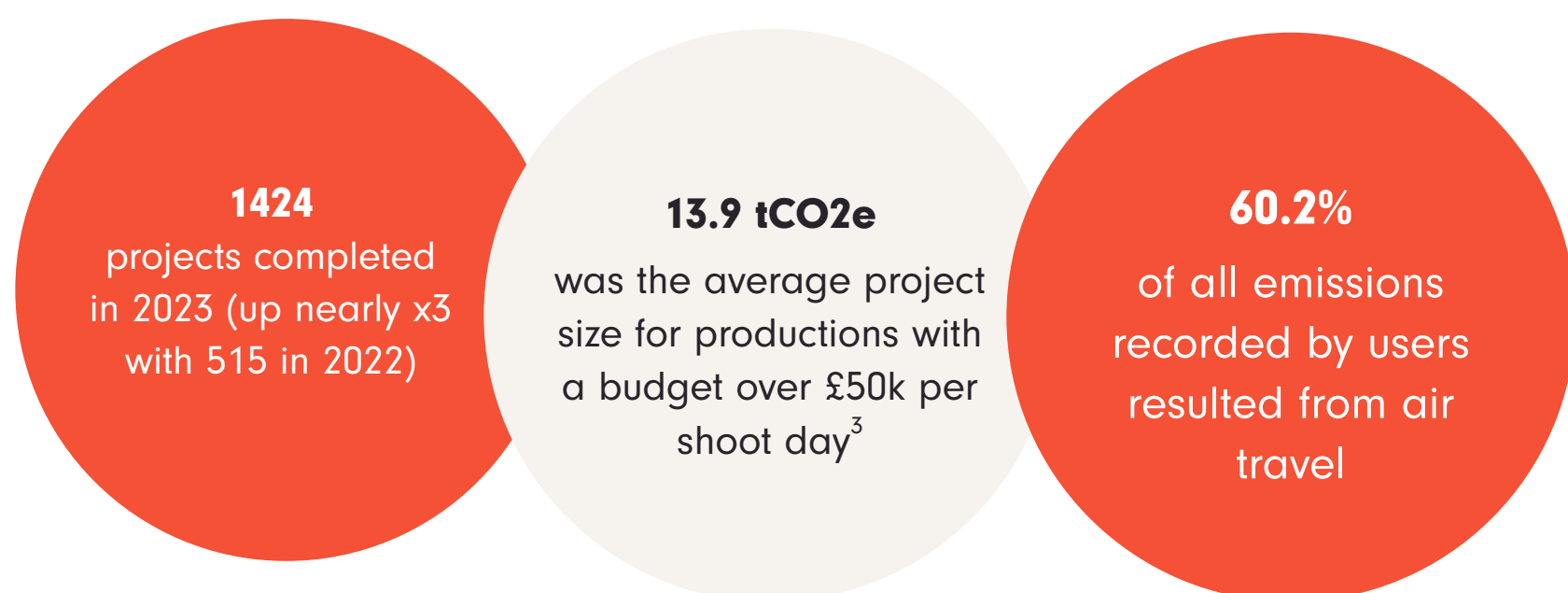
ACTION 02



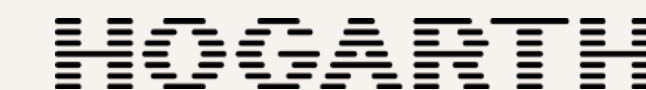
This year saw the AdGreen calculator undergo a significant overhaul.

The new calculator is:

- **Tailored to the industry:** Project breakdown between pre-production, production and post-production to replicate the advertising production.
- **New features:** Additional activity items including virtual production, hard drives and cloud storage.
- **Simpler:** Activity benchmarks created for wardrobe, catering, waste and more meaning you can work with information you have to hand.
- **Faster:** Automatic calculation of connected activities, e.g. accommodation and evening meals, meaning you can finish footprints quicker.
- **More robust:** Regularly updated carbon factors to ensure reliable data is being provided, and geographic variations for electricity, transport and more.



From the latest AdGreen review (March 2024)



CASE STUDY

Hogarth, Sustainably Made

A single day of filming can typically generate over 2.2 tonnes of CO₂. Hogarth, through its Sustainably Made initiative, sets out to reduce this by ensuring all content captured is tagged and stored to make it accessible for reuse on future projects.

For example, Hogarth measured 35 projects for one client in 2022, with the production emissions for these were approximately 91 tonnes of CO₂e. A year later, these numbers reduced to 50 tonnes of CO₂e across 28 shoots for the same client, which was achieved through the reuse of previously shot material.

Furthermore, in 2022 Makerhouse (a sub-brand of Hogarth) was awarded AdGreen Super User status, a Top 10 user of AdGreen. In 2023, Makerhouse was awarded sixth place and Hogarth third place in the top 12 users of AdGreen. In 2023, Hogarth entered data on 26 brands and tracked production emissions for 85 projects with budgets ranging from £1k to £4 million.



3. https://cdn.prod.website-files.com/66797978774108bfe3dddcde/668f9760e9fc55e48aa65672_AdGreen_AnnualReview_Digital_HighRes-compressed.pdf





ACTION 2

Essential next steps for the industry

Finish off...

Calculating baseline emissions from your productions, and/or ask your production partners to begin measuring. Add the activities you are responsible for – i.e. those in your part of the budget.

Get going with...

Identifying production activities which are having the biggest impact and start there. Tackling these will often save your production money too: fewer flights, vegetarian meals, battery powered equipment...

Get ahead by...

Making low emissions production the standard. Take full responsibility for reducing emissions across all productions that your organisation is working on. Using data from your production footprints as your guide, create policies both in-house and in the procurement process which address activities which are consistently high.

“

In the UK, we've signed up for the AdGreen levy, which will help fund continued efforts to reduce emissions from the production of ads. While our company's global operations, including its infrastructure, have been net zero since 2020 and 100% of our electricity use is matched with renewable energy, we will continue to work with Ad Net Zero to help the industry decarbonize and align on standardized benchmarks for measuring environmental impact (Taken from Meta Sustainability Report 2024).

 Meta





ACTION 3

Reduce emissions from media planning & buying

Emissions from media strategies can be significant for many brands, and it is important to have a reliable methodology that is aligned with how the brands develop the rest of their emissions inventories. Addressing this, 2024 marked the launch of Ad Net Zero's largest resource yet, The Ad Net Zero Global Media Sustainability Framework (GMSF), the first version of a series of voluntary standards to enable the industry to calculate emissions deriving from their media plans in a consistent manner.

In June, the first version of 3/6 (TV, Digital and OOH) sets of formulae for specific channels were released. Global working groups resumed in Autumn to build further advice on the remaining three channels (Cinema, Radio/Audio and Print).

Despite so many companies across our supporter base being involved with the voluntary GMSF workstream (see the following page for further details), the Foundational Pathway shows a rather low number of companies:

1. Setting a media emissions reduction target: 6 of global group, 13 companies in the UK and only 5 in the US.
2. Setting a general media reduction plan: 5 global, 7 UK, 5 US.

ACTION 03

Number of stakeholders involved with the voluntary GMSF initiative:

53

marketers

6

media agency holding companies

31

media owners

42

markets across working groups

6

working groups

23

media sustainability solutions providers in a pre-competitive space to voluntarily participate in research

27

industry associations

+75%

of surveyed media owners and other advertising industry stakeholders said they were either likely, or very likely to implement the framework based on the work released so far

“

Omnicom Media Group has been steadfast in its commitment to the success of the Global Media Sustainability Framework. To break the status quo in the media industry, experts with practical sustainability knowledge are needed to create actionable solutions. This is why Omnicom Media Group has been involved in the development of the framework from the beginning and has contributed its many years of experience in the field of sustainable media planning to its creation. As a result, the Global Media Sustainability Framework is a successful joint industry effort to accelerate the sustainability transformation” Stephanie Scheller, Managing Partner Sustainable Solutions, Omnicom Media Group EMEA.



ACTION 03

CASE STUDY

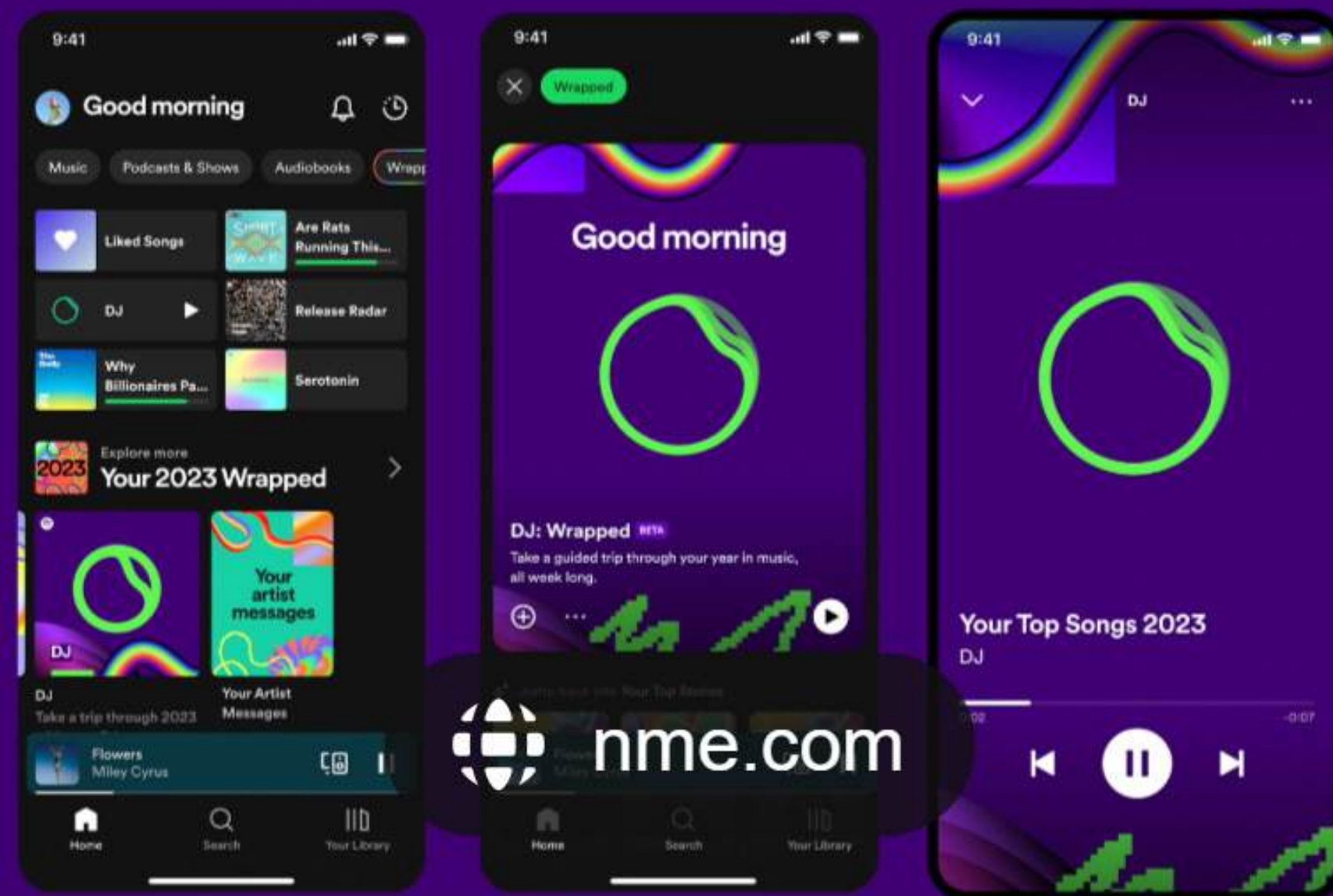


Spotify Wrapped 2023

For their annual Wrapped moment, Spotify partnered with Greenbids to dynamically adjust ad placements based on energy efficiency and reduce emissions without impacting ad quality.

Results:

- Achieved a 38% reduction in carbon intensity per view.
- Reduced cost-based performance metrics with a 40% reduction in Cost Per View for the Trueview Format.
- Set a precedent as the first YouTube campaign to prioritise Carbon Optimisation in 13 of their 16 EMEA markets.



CASE STUDY

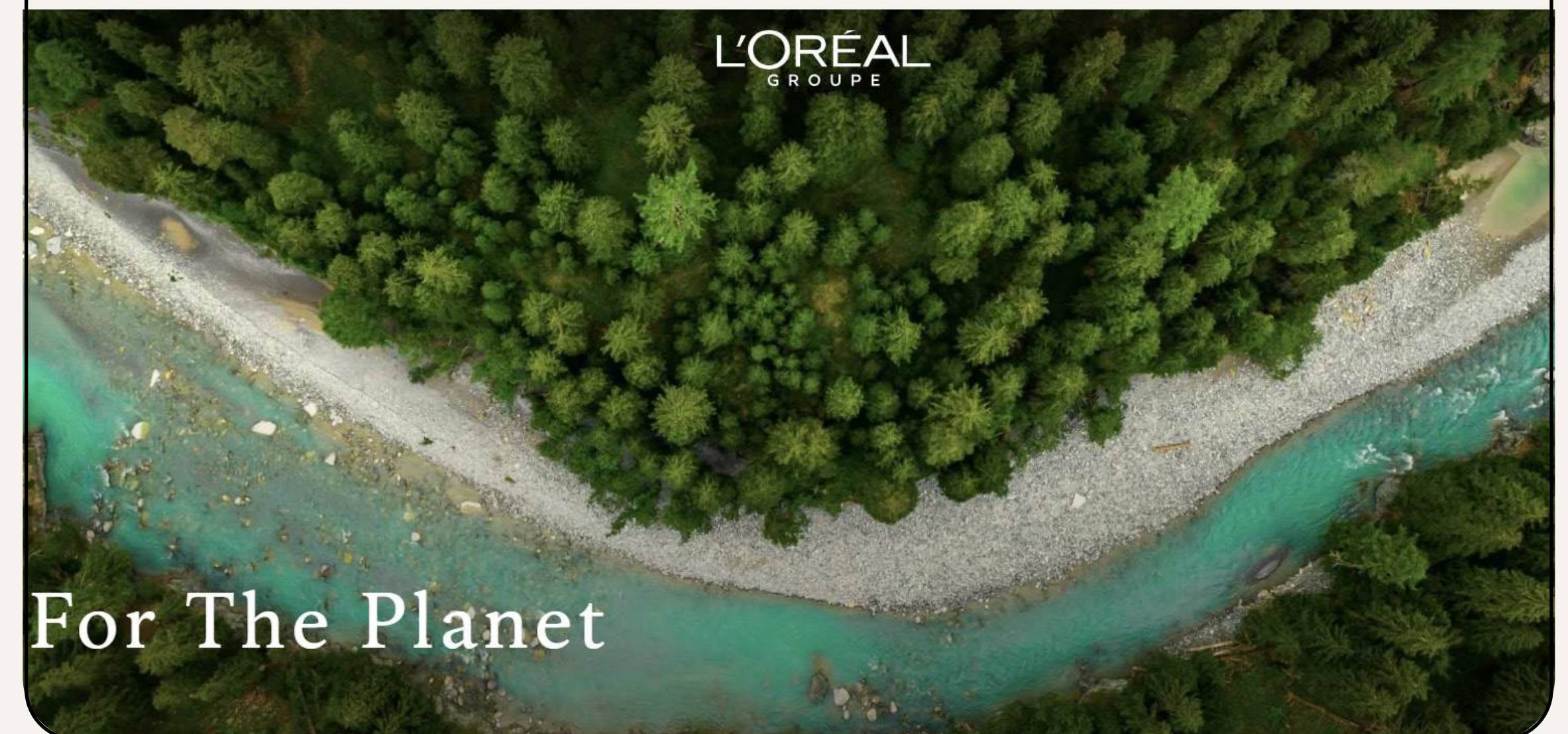


L'Oreal and Impact Plus

L'Oreal US and Canada conducted an in-depth greenhouse gas (GHG) emissions audit, from 16 digital campaigns, and used this data to implement a streamlined, scalable approach to reduce emissions in digital advertising.

Results

- Achieved a 17% reduction in GHG emissions for digital media campaigns, equivalent to avoiding 8,745 kg CO2e, without impacting campaign performance.
- Established an initial understanding of GHG emissions per pound spent and successfully educated media teams and agencies on new environmental KPIs.
- Maintained strong media performance metrics, with brand-lift surveys confirming no loss in consumer perception and campaign effectiveness.





ACTION 3

Essential next steps for the industry

Finish off...

Testing and learning ways of reducing the impact of your media plan as suggested by the [ANZ Sustainable Action Guide](#). This includes tactics for brands, agencies, and media owners.

Specifically for agencies, setting your own benchmark to understand your and your clients' media emissions, and to help use as an additional metric that might guide future media planning.

Get going with...

Reporting your emissions from media planning and buying. Review media buying for any waste activity, e.g. MFAs (Made for Advertising Sites), and eliminate this.

Get ahead by...

If you're a brand or agency, including an estimated carbon footprint on all media plans as standard practice, and considering using the GMSF voluntary standards to help with consistent accurate data.





ACTION 4

Reduce advertising emissions through awards and from events

Action 4 of the Ad Net Zero plan challenges industry awards bodies to ensure that the sustainability credentials and climate impact of campaigns inform judging.

In 2023, sustainability criteria were introduced into award entry forms at top creative awards shows such as Cannes Lions and D&AD. Ad Net Zero aims to work further with these shows and many others like them, to tighten up the criteria for the world's best creative work in service of a net zero economy.

Action 4 also encourages organisers of events and conferences to put sustainability at the forefront of planning. We have partnered with isla – dedicated to supporting the events industry's transition to a sustainable future – to guide our base towards the most sustainable event practices.

ACTION 04

Events

Events are a visible example of a business' approach and commitment to carbon reduction.

Furthermore, emissions from event operations will be increasingly captured under regulations over the next couple of years. Our partnership with isla and its calculator TRACE continues to be a voluntary and valuable option for supporters to help with this, offering a simple approach to communicating with vendors and suppliers on the topic.

The US Action 4 working group have partnered with isla to create a new [Sustainable Events Starter Guide](#). This guide aims to support more event professionals across the industry to understand how to make steps forward to build sustainable event strategies, in addition to isla's deeper dive resources.



ACTION 04

The Ad Net Zero awards show charter

With more and more of our supporters wanting to demonstrate the success of their efforts in the sustainability space, this has been the year for engaging the awards industry in levelling up its climate action.

For this reason, we are currently in the process of developing a voluntary roadmap and toolkit for awards shows to enable consistency and clarity for entrants, and the avoidance of greenwash on the awards circuit. We aim to launch this with the industry in Q2 2025.

Baseline ANZ stats on the integration of sustainability into awards:



CASE STUDY



Papaya Films

Papaya Films applied their experience of using the AdGreen tool to meticulously calculate their emissions from routes to Cannes Lions, showcasing these trips to industry players to inspire change in their own organisations.

Results:

- Train travel resulted in 14.8 times smaller emissions than taking a plane.
- Driving an electric car resulted in 4.6 times less carbon footprint than flying.
- Hosted panels and discussions with creatives at Cannes to inspire change beyond their own organisation.





ACTION 4

Essential next steps for the industry events

Finish off...

Making lower emission choices that will likely lower your event's overheads too i.e. vegetarian meals, going virtual? The US group's [starter guide for events](#) can help you with these quickly.

Get going with...

Reducing waste, and rethinking using swag – does your audience really need it? And keep the event local where possible.

Get ahead by...

Considering your long-term impact and strategic gains. Prioritise renewables to power your event, get a sustainable procurement policy ready for increasing regulations (including CSRD by 2028 if not already in place for your business). Finally, communicate with your audiences and enlist them in the process.





ACTION 5

Use our ability to support more sustainable behaviours

With no credible pathway to net zero without significant cultural and behavioural change, the deepening of the Action 5 workstream has never been more important. The sustainability sector agrees too, with leading organizations like the UN, IPCC, and various NGOs such as Climate Change Committee, Project Drawdown, Count Us In, Potential Energy Coalition aligned around this fact.

Encouragingly, the Foundational Pathway shows that 76% of companies are already creating work for sustainable products, services and behaviours, including all six holding companies. However, with a recent survey from WARC revealing that only 4% of clients are adding climate considerations into their briefs, there is a clear need to plant this work at the heart of the creative process.

As a result, Ad Net Zero now has a global, voluntary and science-backed pilot underway that aims to help creative, strategy and brand professionals support more sustainable behaviours through advertising campaigns. Named Every Brief Counts, this is a test programme, which aims to educate teams on the key sustainable behaviours outlined by climate science and the ways to tell these stories effectively through advertising.

To support this initiative, the Advertising Association, Ad Net Zero and Kantar have launched The Sustainable Behaviours Advertising Tracker.

The new report will provide a quarterly and annual review of how and where sustainable behaviours feature within advertising campaigns. It will provide a new level of insights to the advertising industry, with benchmarks across categories for the portrayal of more sustainable behaviours.



ACTION 05

Introducing Every Brief Counts

This is a test programme, which aims to educate teams on the key sustainable behaviours outlined by climate science and the ways to tell these stories effectively through advertising.

To support this initiative, the Advertising Association, Ad Net Zero and Kantar have launched The Sustainable Behaviours Advertising Tracker. The new report will provide a quarterly and annual review of how and where sustainable behaviours feature within advertising campaigns. It will provide a new level of insights to the advertising industry, with benchmarks across categories for the portrayal of more sustainable behaviours.



The Every Brief Counts creative identity was developed by Dentsu Creative UK

A timeline for Every Brief Counts

Q2
2024

Measurement partnership announced with Kantar

Q3
2024

Every Brief Counts pilot launched in the UK and US with 20 companies committed at launch

Q1
2025

Share learnings and case studies from the Every Brief Counts pilot, as well as data from Kantar



ACTION 05



The Campaign Ad Net Zero Awards continue to be a living example of a dual-purpose award for the net zero transition – not only celebrating the industry’s more traditional abilities, but importantly championing the best examples of climate action within the ad industry.

We believe in the power of these awards to offer a celebration of progress and offer best-in-class case studies for the industry to learn from and mainstream. This year we had 75 entries, and 61 scored highly enough to be of shortlist quality, showing the rigour, dedication and improvements entrants have applied year on year.



ACTION 05

CASE STUDY

dentsu

dentsu: The Cupboard to Fight Food Waste

Marrying sustainability with creative technology, dentsu created a 'digital food storage cupboard' where consumers can check their items purchased, stored, and expiry dates in real-time.

Results:

- Saved 174,600 food items with an average of 20 food items per transaction within the first 2 months of the feature being launched on Gourmet Food's app.
- 14% growth in app downloads and 18.1% growth in active users, unexpectedly, driving an 184.2% increase in campaign joiners since the first month of launch.
- The new app feature attracted the press, gaining the earned PR value of over £88,000.
- Proved from consumers that this application could simply blend into their lifestyle and smoothly embark on their sustainable journey.



SYSTEM 1 CASE STUDY



Lucky Generals and Amazon

Amazon has committed to reducing its packaging and prioritising recyclable materials. According to System1, ITV, and Richard Shotton in ['The Greenprint'](#).

"The most notable decision in this campaign is the focus on children modelling positive behaviours, such as reusing old packaging for play. This subtle detail shouldn't be overlooked, as **'social proof'** is a powerful strategy for brands aiming to make an environmental impact. In this case, the children are depicted as already adopting positive behaviours, encouraging audiences to join in and embrace this 'norm'. Additionally, children are often regarded as **'neutral messengers'** in behavioural science, making them ideal protagonists for promoting positive environmental behaviours. Their innocence and non-partisan nature help to avoid the **'ostrich effect'**—a behavioural principle where fear tactics often drive audiences away from the issue at hand."





ACTION 5

Essential next steps for the industry

Finish off...

Diving into the archive of [Campaign Ad Net Zero Award case studies](#), where you can find best-in-class work across all different verticals. Share amongst your team and encourage creative discussions about how you could support more sustainable behaviours within your work. If you already have this work, make sure the Ad Net Zero team know about it so we can help scale the learnings!

Get going with...

Identifying potential work for the Campaign Ad Net Zero Awards 2025, making sure you include sustainability results alongside commercial results. If part of the UK or US chapters, join the Every Brief Counts pilot.

Get ahead by...

Prioritising conversations with clients or partners about how to best collaborate around supporting more sustainable behaviours. How can you make this a key KPI for partnerships in 2025? For more in-depth training for your team, consider working with the [#ChangeTheBrief Alliance](#).





Part 3: The Regional Outlook



We are just getting started on our sustainability journey here at Kargo, and we attribute a lot of our rapid learning, growth, and development in this critical space to the knowledge and support we've gained from partners like Ad Net Zero. Kargo has been inspired by Ad Net Zero's impactful presence at key industry events like Advertising Week New York and Climate Week NYC and their thought leadership in the market. Our participation in our first few Ad Net Zero meetings has already provided invaluable insights into the future direction of the advertising industry, particularly in sustainability. We're excited to build on this knowledge and become more active change makers in the ad tech space, driving positive environmental outcomes in tandem with high performing campaigns for our clients, all with the support and guidance of Ad Net Zero. Thank you for your leadership - keep going!"



Michael Shaughnessy
COO, Kargo



The first international chapter, Ad Net Zero US nears its two-year anniversary. Year one was marked by significant growth, increasing from 17 new US supporters at launch to now a community of over 150 companies engaged, including US teams from Ad Net Zero global supporters. This second year has been marked by accelerating momentum, as the program continues to take root in the US market. The chapter actively engages supporters in regular working groups focused on each area of the Ad Net Zero Five Action Plan, in addition to identifying other areas for impact.

Over half of the US supporter base are SMEs (Small or Medium-sized Enterprises, classified as under 250 employees), proving the need for deeper work on turnkey tools and resources.

We've seen some encouraging areas of progress. Firstly, 73% of US supporter companies now have emissions reduction targets (30%) or are working towards them (43%). The latter is the largest area of progress by volume, but the number of net zero targets has increased by 120%. Secondly, for Action 2, we've seen a 70% increase in US projects input into the AdGreen carbon calculator tool for production, across circa 50 US companies. Driving further progress in sustainable production, the US chapter shepherded and released the [Hard Drive Re-use Best Practice](#), in collaboration with Green The Bid, AdGreen with guidance from Film Locker. We look forward to seeing what the US market can achieve going forward."



Rachel Schnorr
Ad Net Zero US Director





CASE STUDY



ITV - Futureproofing through a Climate Transition Plan

Earlier in 2024, in what was believed at the time to be a first in the global media industry, ITV published its initial [Climate Transition Plan](#).

This is aligned to the Transition Plan Taskforce (TPT) framework, established by the UK Government, and outlines how ITV is both playing a significant role in accelerating society's shift to net zero while preparing to thrive in that transition.

The plan is built around the 5 pillars of the framework, starting with setting ITV's ambition and assessing the resilience of its business model in the transition, formulating a detailed implementation strategy towards net zero and low carbon products, mapping engagement activities across the value chain and other external stakeholders, disclosing key metrics, and finishing with the work it is doing on governance, culture and upskilling of its workforce.

Through this plan, ITV have restated their strategic priorities around reaching net zero (in their own operations and value chain), shaping culture (internally and by engaging audiences), and building future resilience (both for its business and for its industry).



As the launch market for Ad Net Zero four years ago, and therefore the maturest regional chapter in the programme, it's fantastic to see the energy and engagement throughout supporter businesses at their current levels – maybe the highest ever. This is being demonstrated through genuine progress markers within the businesses, with 89% of UK supporters having now set public science-based reduction targets (63%) or in the process of doing so (26%). Whilst there is still significant work to be done if the industry is to future-proof itself fully, particularly on supply chain reduction as we ready ourselves for the likes of CSRD, the appetite for change via programmes such as our Every Brief Counts pilot is clear. Combine this with the range of case studies demonstrating reduction and commercial success we saw across the UK categories at the Campaign Ad Net Zero Awards, and the UK is set up to continue to lead on key issues such as climate transition planning."



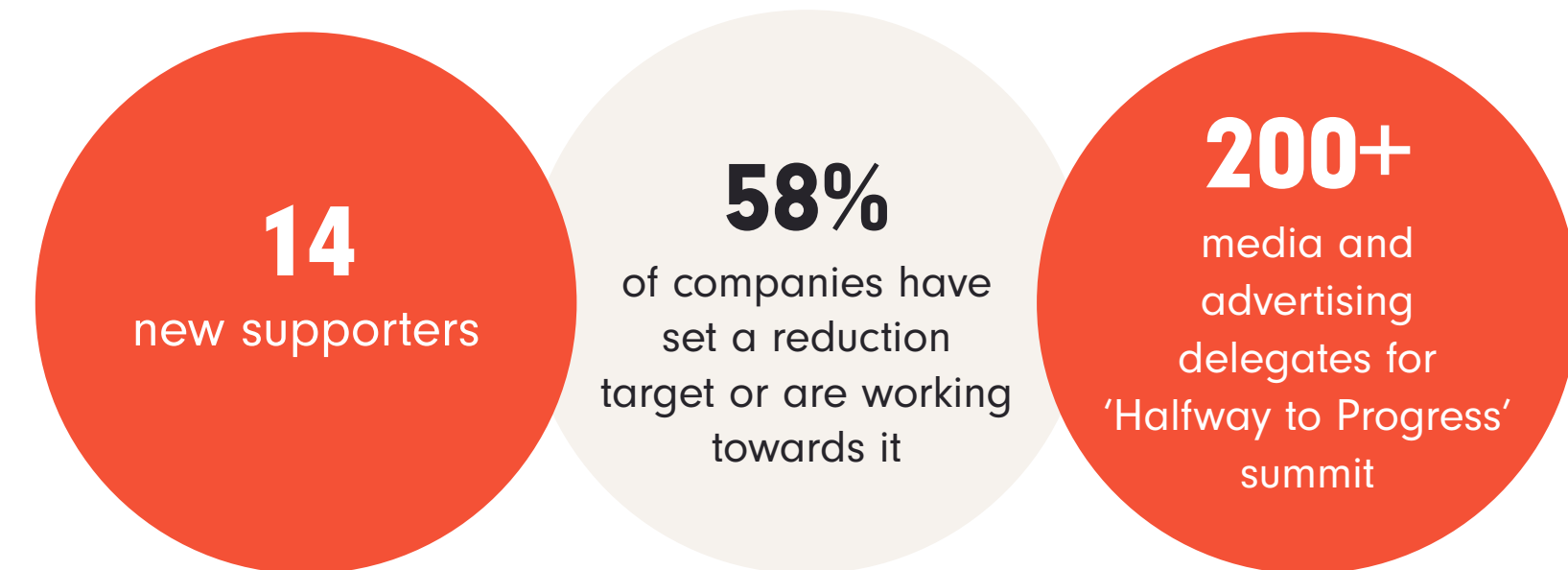
Elle Chartes
UK Director, Ad Net Zero





About Ad Net Zero Ireland:

Ad Net Zero Ireland, now going into its 3rd year, is driven by all the key trade bodies and organisations in the Irish marketing and advertising community: IAPI (Institute of Advertising in Ireland); AAI (Advertising Association in Ireland); MII (The Marketing Institute of Ireland); CPI (Commercial Producers Ireland); and IAB Ireland.



We have known for the past number of years that there is a palatable appetite for our industry to collaborate on this subject. To learn more and to do more."



Mary O'Sullivan
Director of Ad Net Zero Ireland & Europe Hub

CASE STUDY



Droga5 and Accenture Song

In partnership with Droga5 Dublin, Accenture Song launched Our Human Moment, a global anthropological research project designed to shift perceptions of sustainability from the abstract to connect with people's lives and stimulate behaviour change.

The film launched officially at the World Economic Forum Annual Meeting 2023, Davos, and has played a central role in client engagements and projects globally – kickstarting sustainable innovation and behaviour change projects across diverse industries and markets. The team created a production that was as sustainable in every aspect as possible, including DE&I, to support the ethos of the project, drawing on the tools and principles of AdGreen and Green the Bid - quite a challenge given the film had to capture footage from six countries across five continents. An approach was devised with great planning and discipline, briefing multiple remote production partners on every aspect of the job, and minimising emissions by mixing stills and live action created locally over 4 months. The result was a project that only produced 3.49 tonnes of CO2, just over 1/4 of the AdGreen average for a large project with many more days of multiple-location shooting.





“

In August 2023, New Zealand’s ad industry rallied around Ad Net Zero’s ambition to reduce the carbon emissions from the production, development and running of advertising. Shortly following launch, supporters collaborated on the publication of a Decarbonisation Roadmap which details our programme’s ambitions and initiatives. Recognising a need for additional accountability, the *State of the Industry Report* was published in October 2024 as a complement to the roadmap. It adds another layer of transparency and rigour to our ambitions, and sets a baseline of where our industry is today, so that we can track progress against the roadmap year over year. A little over one year on from launch, we’re proud of where we are, with a strong base of Supporters who are engaged and trialling tools and approaches to measure and reduce their emissions.”



Jennifer Gunn
Head of Sustainability, Ad Net Zero Aotearoa

About Ad Net Zero Aotearoa:

Differing slightly from other chapters, Aotearoa, launched in 2023, has a 2030 roadmap that all working groups are moving towards.

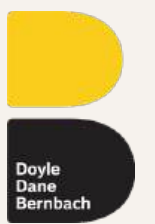
The agreement is for supporters, by 2030, to be confident identifying and acting on reduction opportunities throughout the processes detailed in each action step, and to have incorporated sustainability considerations throughout their business.



CASE STUDY

The GreenPrint for Volkswagen

“The Volkswagen Kombi is an icon for progressiveness, driven by those who believed in a better world. But it’s still a petrol vehicle. So, to help those who love their Kombi and the environment, Volkswagen created The Greenprint: An open-source set of plans that anyone can use to turn their Kombi into an EV, in 20 easy-ish steps. We made an all-in-one kit available, or owners could source the parts themselves with our approved list, and not pay us a cent. An online hub housed further details about each step, along with user generated videos and FAQs – by the people, for the people in true VW spirit.”



THE REGIONAL OUTLOOK

UAE

Ad Net Zero engages young creatives at 2025's Dubai Lynx Festival:

Dubai Lynx opened applications for its student competitions, hosted in partnership with Ad Net Zero, which will offer students aged 18 to 25 in the MENA region the opportunity to lead the change within the creative marketing landscape and gain a strong foothold in the highly competitive brand, marketing, advertising, and creative job market. Khaled Al Shehhi, Executive Director of Marketing and Communications at the UAE Government Media Office, said, "I specifically wanted to judge this competition because I believe in the power of young minds to drive meaningful change. Events like the Dubai Lynx Festival are more than just showcases; they are incubators of innovation. It's inspiring to see universities encouraging their students to participate. But we need even more institutions to join in. This is a unique opportunity for students to gain hands-on experience and directly interact with industry leaders, fostering real-world skills and making invaluable connections."



“

The Gulf Cooperation Council (GCC) countries are making significant strides through national and regional initiatives to achieve environmental stewardship and sustainable development. The successful culmination of COP28 in December 2023, coupled with the UAE's declaration of 2023 and 2024 as the Years of Sustainability, has provided a strong impetus for the Advertising Business Group (ABG) to inspire sustainable practices within the region's advertising and marketing industry.

By aligning with Ad Net Zero (ANZ), we aim to leverage collective expertise, innovative strategies and frameworks to significantly reduce Greenhouse Gas Emissions (GHG) across advertising activities in the UAE and beyond.”



Eleni Kitra
Executive Director, Advertising Business Group





THE REGIONAL OUTLOOK AUSTRALIA



“

We are proud to launch the Australian chapter of Ad Net Zero, uniting the Australian Association of National Advertisers (AANA), Advertising Council Australia (ACA), Interactive Advertising Bureau Australia and Media Federation of Australia (MFA) with a shared commitment to reduce the carbon footprint of advertising to net zero. Now is the ideal time for our industry to come together to drive meaningful change, helping to transition towards a more sustainable future. By building sector-wide collaboration and applying globally developed frameworks to our local marketing, media, and advertising landscape, we can maximize our impact. We look forward to partnering with Ad Net Zero and chapters worldwide, leveraging shared insights, frameworks and learnings to make a lasting difference.”



Sophie Madden
CEO, Media Federation Australia



THE REGIONAL OUTLOOK

EUROPE

Europe Hub - announced this year!

Announced at Cannes Lions 2024, the Europe Hub has been co-created with EACA to share knowledge, build connections and create opportunities for international learning. We are delighted to work with and support our Ad Net Zero local European markets (Chapters).

So far, they are partnering with trade associations across Poland, Finland, Belgium, Italy, the Netherlands, Slovakia and Norway. Expect to see more countries added here soon as more countries across Europe prepare their supporters for the net zero transition.

CASE STUDY



JCDecaux SE

Since 2014, JCDecaux SE (France) has pursued a climate strategy to achieve Net Zero Carbon by 2050 across the entire value chain, focusing on the principles of measuring, reducing, and contributing.

Works have included recycling stations, sourcing eco-friendly supplies, no disposable plastics, and steps towards a paperless office. Business activities guidelines have come in the form of encouraging meetings via Teams to minimise travel, as well as education within the company such as paperless challenges and the nomination of Green Ambassadors among colleagues to share ideas. As well as actively reducing emissions from advertising production through initiatives like use of electric cars, smart lighting and waste management, the firm has a unique post-campaign measurement tool which addresses ESG expectations in the works called the 360 Footprint. Reduction of emissions through awards and from events has seen promotions to raise awareness among stakeholders and online training for employees.

The results are already paying off with a -21.4% vehicles emissions reduction vs 2019 and a -70% energy consumption of digital assets via smart lighting system (vs 24h lighting).

100% of electricity consumption is now covered by renewable energy sources and 100% of waste is recovered for standard advertising campaigns.

“

EACA is delighted to be part of the newly formed Ad Net Zero European Hub. We have strongly advocated for it as it is high time for all of us to collaborate and align more – advertisers, media agencies, creative, digital, production, out-of-home, broadcast, and publishing – and cross-country across the region. At EACA, we welcome all collaboration efforts from across every country chapter and look forward to working with our colleagues and partners in other markets to progress on the important topic of sustainability.”



Tamara Daltroff

CEO of the European Association of Communications Agencies (EACA)





Part 4: Raising the floor, reaching for the ceiling

Sustainable Advertising: How advertising can support a better future

Sustainable Advertising, written by Ad Net Zero Chair of the Global Board, Sebastian Munden, and the Advertising Association’s Communications Director, Matt Bourn, was published by Kogan Page in March 2024.

It provides a manifesto for change for every advertising practitioner, along with a checklist to track their sustainability progress. Filled with tips, insights, case studies and practical information, it offers the reader an effective stream of training and tangible action steps in addition to Ad Net Zero’s core training.

The book:

- Focuses on how advertising can become more sustainable in practice
- Provides professionals with examples of experts implementing the Ad Net Zero action plan and taking positive action in their daily working lives
- Highlights best practice case studies from businesses large and small on lessening impact whilst improving productivity and saving money

For more information about the book, please visit www.sustainableadvertising.uk

Both authors are available to speak at events and can deliver a variety of workshops which support team development around all areas of sustainable advertising practices. Please contact the Ad Net Zero team for more details.



Seb’s session on the crucial intersection of advertising and sustainability was truly enlightening. His insights provided actionable strategies and a fresh perspective on how the industry can drive positive change. Instead of dwelling on the challenges, Seb empowered us with practical tools and confidence to create impactful work that benefits both clients and the planet. It was a motivating experience that left us inspired to make a difference not only in our professional endeavours but also in our broader community. Thank you for an eye-opening session!”



Ad Net Zero's Impact:

Some concluding thoughts from John Osborn, US Managing Director

“

Ad Net Zero as an organization is laser-focussed on enabling businesses to scale their impact. With now over 250 supporters representing the breadth and diversity of the industry, on a voluntary basis and pre-competitive basis, Ad Net Zero has made significant progress in identifying sustainable best practices and standardized frameworks for them to do so. Real progress is being made on establishing benchmarks for carbon emissions in production with tools such as AdGreen, with data from over 3,000 jobs now in their system. Over the summer, the *Global Media Sustainability Framework* was announced, with the first three formulae in place. While there's more work to do, this framework is now being integrated into the business practices of carbon emission measurement and management companies, adtech firms and media agencies. We are now also renewing focus on Action 5 with *Every Brief Counts*, helping creatives to identify and amplify sustainable behaviors in the work itself.

Moving forward, as these tools continue to evolve, Ad Net Zero is more focused on driving real-world reduction outcomes across the industry. The Foundational Pathway is a necessary instrument for monitoring progress, as more and more supporters ingest the frameworks and pursue their own strategies for lowering emissions. We've also seen a rapid rise in new product innovation with the goal of reducing carbon emissions, new increased partnerships, and new sustainability ecosystems arising as the industry begins to strategize and implement their own sustainability goals.

This is one of the most exciting times in the industry, when the gears of promise meet with those of everyday practice, shifting from talk to more action. Together, we will accelerate towards a healthier, cleaner and more prosperous future.”



John Osborn
Ad Net Zero, US Managing Director

Of those surveyed across our UK events, there was 37.5% increase in those that said they felt they 'strongly agreed' with the phrase: 'I feel confident engaging with my senior leadership and key decision-makers within my business to reduce carbon footprints and promote sustainable consumer behaviour'.

Out of those supporters completing the survey, we achieved an average of 9.67 coming from the question 'On a scale of 1-10, how likely are you to recommend Ad Net Zero?'



AD NET ZERO



ALL FOR NONE

adnetzero.com