

Zeroed In: Brand Sustainability in the Age of AI.

Insights from 200 brand leaders on
climate action, audience perception
and the evolving role of AI in
sustainability strategy.

Foreword.

"Marketing has always been a powerful lever for change – shaping perceptions, driving behaviour and influencing our culture. But in the climate era, that influence carries a new responsibility."

The environmental footprint of marketing is significant and growing. From media buying and digital infrastructure, to AI-driven content and global digital supply chains, emissions linked to marketing activity can no longer be overlooked. And yet, in many organisations, marketing remains disconnected from enterprise-level decarbonisation strategies.

This report is designed to change that.

Through our inaugural 'Zeroed In' benchmark survey, we've heard directly from senior marketers at leading global brands across the UK and US. Their message is clear: sustainability matters – to customers, to leadership, and increasingly to the competitive success of the brand. But marketers are also navigating complexity: the opportunity to adopt emerging technologies like GenAI, the need for immediate ROI and the complexity of cross-industry collaboration.

At 51toCarbonZero, we exist to make climate action simple, credible and measurable. We work with brands, agencies and platforms to embed sustainability into the marketing function – not just as a reporting obligation, but as a strategic advantage.

We believe that when marketers are empowered with the right tools, frameworks and support, they can lead their organisations into a more sustainable and more profitable future.

This report highlights the challenges, but also the momentum. The optimism. The action already underway.

I hope it sparks ideas, strengthens business cases, and helps move your organisation from intention to impact."



Richard Davis
CEO and Co-Founder
51toCarbonZero

Executive Summary.

***Zeroed In: Brand Sustainability in the Age of AI* reveals how senior brand marketers are navigating the fast-changing intersection of sustainability, technology, and commercial performance.**

Based on findings from *Zeroed In: The Brand Marketing Pulse* – first-of-its-kind benchmark research from 5ltoCarbonZero – this report surveys 200 senior marketers across the UK and US to explore their climate commitments, concerns, and capabilities in the year ahead.

Our research uncovers a marketing function in motion: ambitious, aware, but still constrained. The good news? Marketers believe progress is not only possible, but already underway.

We explore six core themes shaping the sustainability landscape for marketing in 2025:

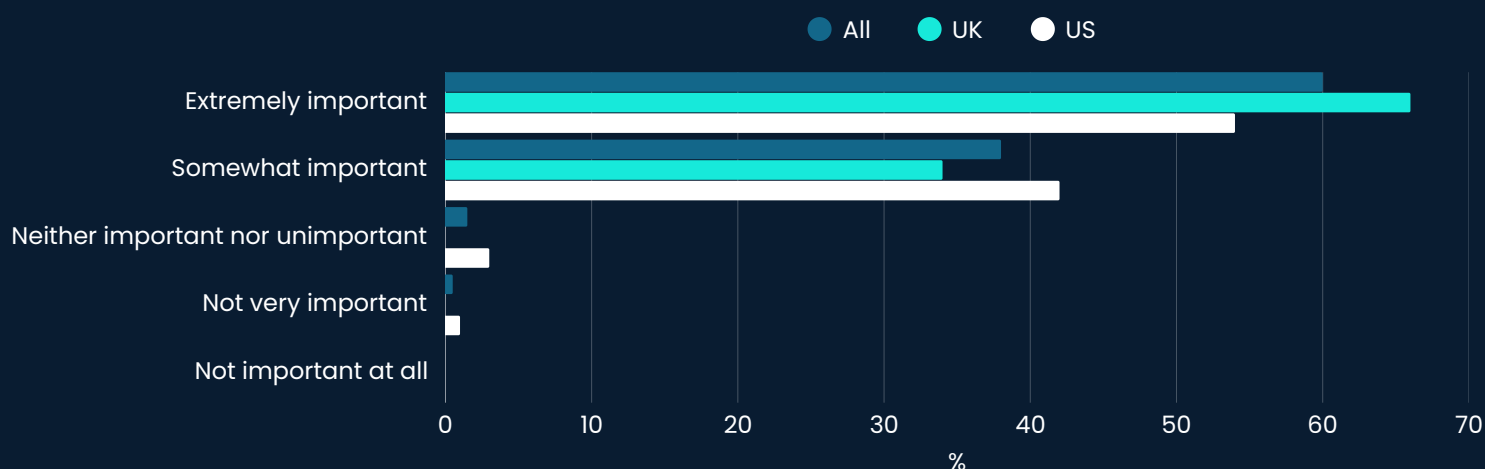
- 🔄 **How important sustainability is to customers, according to marketers.**
- 🔄 **The extent to which marketers believe they're making progress on carbon reduction.**
- 🔄 **Whether brands plan to increase, decrease or maintain their sustainability commitments in 2025.**
- 🔄 **How much confidence marketers have in reaching net zero by 2030.**
- 🔄 **The role sustainability credentials play when choosing marketing partners.**
- 🔄 **What marketers see as the biggest obstacles to becoming more sustainable.**

Throughout the report, you'll find deeper insights on each theme, as well as practical tips to help marketers act more sustainably, even when facing pressure from fast-evolving technologies like GenAI.

Sustainability is no longer a side note. It's a strategic imperative. And marketing has a pivotal role to play.

Customers care about sustainability.

"How important, if at all, is it to your customers that your brand is operating sustainably (minimising its impact on the environment and in particular climate change)?"



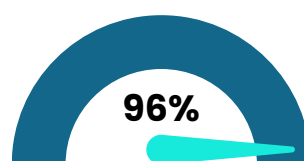
Respondents in both the UK and US reported near-universal agreement that sustainability is important to their customers. In the UK, **100% of respondents said it matters that their brand operates sustainably**, while 96% said the same in the US.

This highlights a strong market expectation: customers now view credible environmental action – particularly on climate impact – as a key part of brand trust and relevance. For marketers, sustainability is no longer peripheral. It's becoming central to how brands compete and connect with their audiences.

"How important is it to your customers that your brand is operating sustainably?"



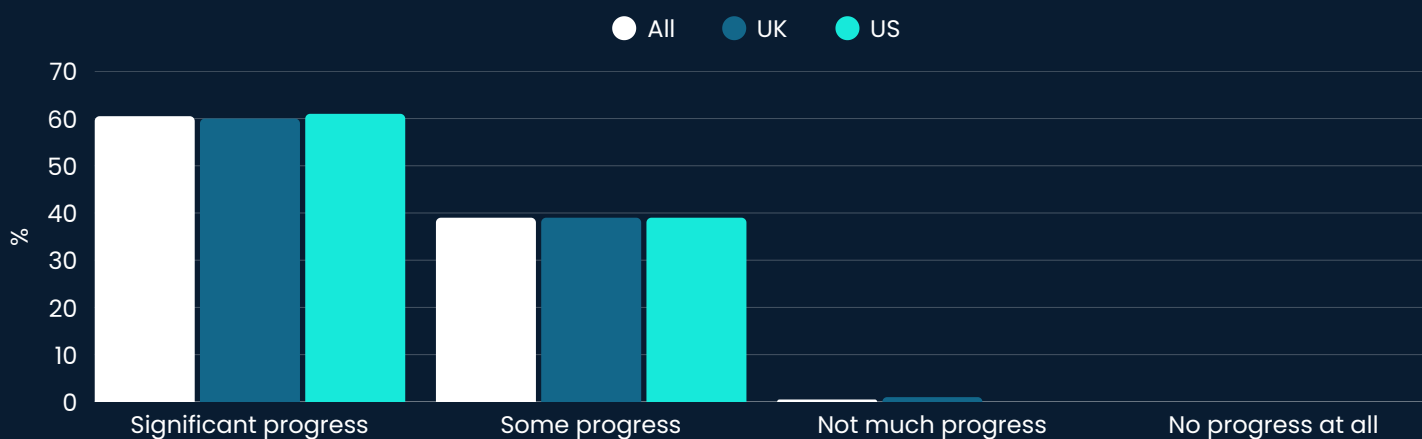
UK 
Extremely Important +
Somewhat Important



US 
Extremely Important +
Somewhat Important

Progress is gaining momentum.

"Do you believe your brand has made progress towards reducing carbon emissions?"



Marketers overwhelmingly believe their brands are making progress on carbon reduction. In both the UK and US, **99% of respondents said their company has taken steps to reduce emissions**, with over 60% describing that progress as significant.

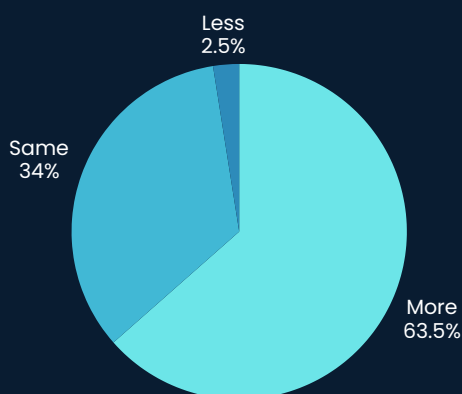
Notably, not a single US respondent reported no progress at all. This near-universal momentum signals that carbon reduction is no longer an aspirational goal but that it's becoming operationalised.

Brands are not only pledging action – they're actively building it into their delivery. For marketers, this means sustainability is shifting from positioning to performance.

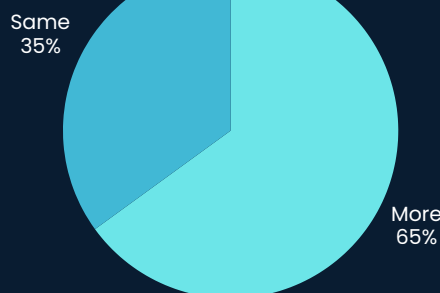
Brands are investing in sustainability.

"Are your brand's sustainability commitments set to change over the next 12 months?"

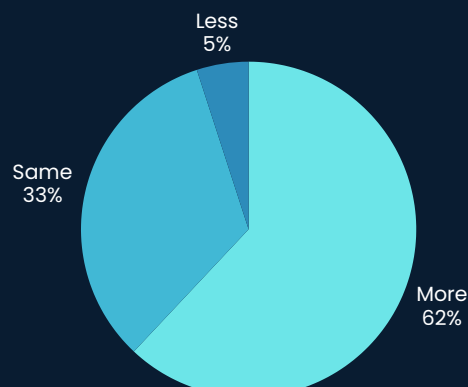
More = "We are committing more to sustainability"
Same = "We are committing the same to sustainability"
Less = "We are committing less to sustainability"



Total



UK 



US 

While **nearly two-thirds of marketers (63.5%) said their brand is increasing its commitment to sustainability over the next 12 months**, the more striking insight lies in the contrasts.

In the UK, 0% of respondents said they're stepping back – a clear sign that climate ambition is holding firm despite market pressures.

In the US, a small minority (5%) reported reduced commitment, but the majority (62%) are still leaning in.

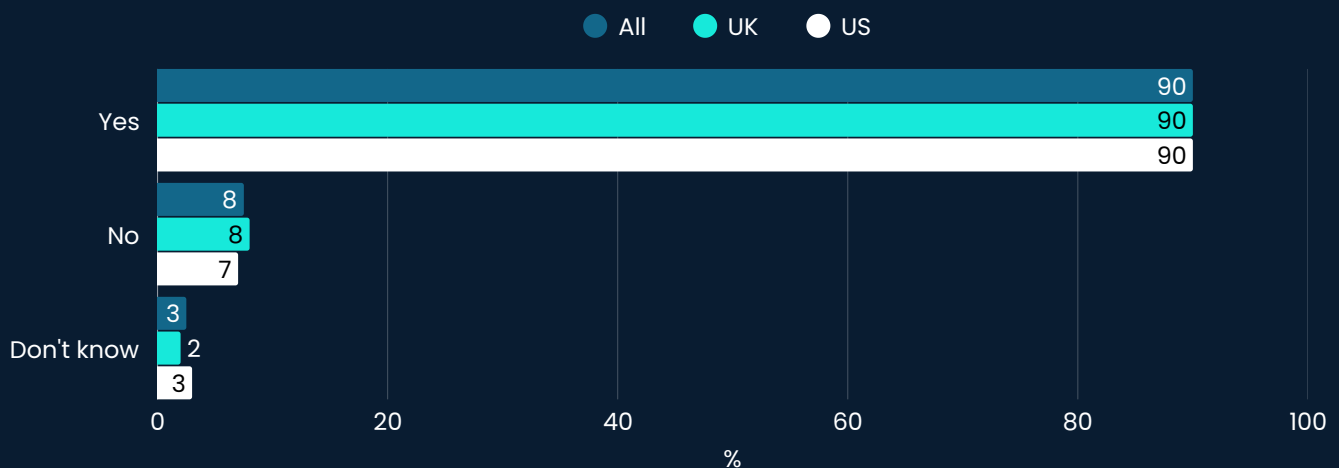
The takeaway? Across both markets, sustainability is not being deprioritised – it's steadily becoming a fixed part of brand and marketing strategy.

0%

UK senior brand-side marketers who will be scaling back sustainability commitments over the next 12 months.

Marketers believe net zero is within reach.

“Do you believe the marketing industry as a whole is on the path to achieving net zero by 2030?”



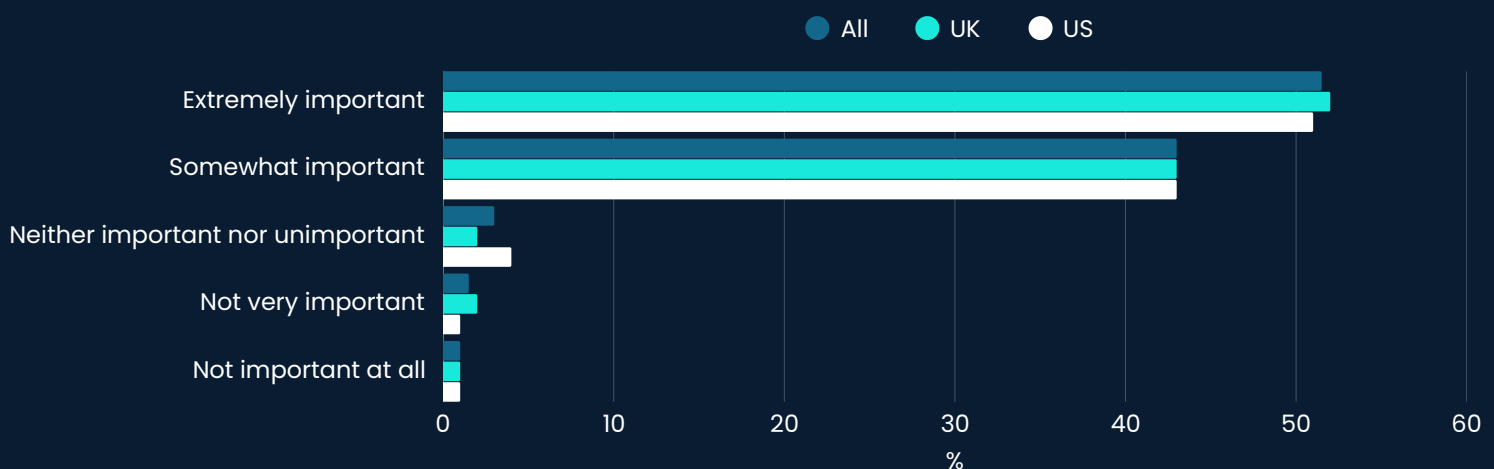
An overwhelming **90% of marketers believe the industry is on track to achieve net zero by 2030** – a surprisingly unified view across both the UK and US.

While a small minority expressed doubt (7.5%) or uncertainty (2.5%), the dominant narrative is one of optimism. This level of confidence suggests that sustainability is no longer viewed as a side project or compliance task, but as a shared industry goal.

For agencies and brands alike, the challenge is now execution and moving from intent to impact at pace.

Green credentials shape partnership decisions.

“When selecting marketing partners (agencies / tech vendors / publishers etc), how important, if at all, are their sustainability credentials?”



Sustainability credentials are now a decisive factor when selecting marketing partners. An **overwhelming 94.5% of marketers say it's important that their agencies, tech vendors and publishers can demonstrate environmental responsibility**, with over half (51.5%) saying it's extremely important.

This signals a major shift in procurement priorities: carbon performance is no longer a “nice to have,” it's part of the value equation. Whether it's agency credentials, media supply chain transparency, or vendor emissions data, partners are being held to higher standards and those without a credible sustainability story risk losing out.

“When selecting marketing partners, how important are their sustainability credentials?”



Challenges are clear, now it's time to act.

"What, if anything, are the biggest obstacles to being more sustainable in your role?"



The biggest barrier to sustainable marketing isn't ambition - it's **technology, alignment and infrastructure**. Marketers cite carbon-intensive GenAI use (41.5%) and lack of integration with wider enterprise strategies (40%) as the top challenges. Budget constraints (37%) and uncertainty around ROI (36.5%) also remain significant.

These results point to a clear tension: while marketers are eager to act, many are operating without the systemic support, investment, or clarity they need to scale impact. Closing this gap will be essential for meaningful decarbonisation.

"This research from 51toCarbonZero confirms what we see every day: that **marketers are ready to lead on climate action**, but they need the right infrastructure, partners, and accountability to scale that impact. From GenAI to carbon reporting, our challenge is to balance speed with stewardship, and work with tech to serve both creativity and climate. We're proud to collaborate with 51toCarbonZero to **turn ambition into measurable, transparent progress**."

Pooja Dindigal, Global Head of Impact, DEPT®

Solving the GenAI conundrum.

Generative AI is transforming marketing – enabling rapid content production, personalisation at scale, and new efficiencies across the entire workflow. But with this innovation comes a hidden cost.

42% of marketers in this report identified the increasing use of carbon-intensive GenAI tools as the biggest obstacle to operating sustainably. Unlike most digital tools, GenAI requires immense computing power and storage – driving significant emissions from data centres, often with little visibility for end users.

As adoption accelerates, the risk is clear: brands may be unintentionally increasing their carbon footprint in the name of innovation.

But this isn't a binary choice. With the right strategies and technologies, marketers can use GenAI more responsibly, balancing creativity and performance with sustainability goals.

Meet our sustainable GreenAI tool (beta):

GreenAI is a low-impact, custom-tuned GPT designed to minimise energy use while supporting smarter, faster decision-making.

It reduces compute load by stripping out unnecessary processing, limiting token sprawl and prioritising clarity over verbosity.

It delivers concise, efficient outputs whilst estimating energy savings, helping teams understand and manage the carbon cost of GenAI in real time.



*Try the free
beta version!*



About 51toCarbonZero.

51toCarbonZero is a technology-enabled carbon strategy company helping organisations turn climate ambition into measurable action.

We work with leading global brands, agencies and digital platforms to simplify the journey to net zero – combining expert advisory with a purpose-built platform for tracking, planning and reducing emissions.

Our approach is built for modern marketing and media operations.

From Scope 3 supplier data to GenAI usage, we make the complex visible, manageable and actionable.

With real-time dashboards, compliance-ready reporting and integrated transition planning, 51toCarbonZero empowers teams to move faster, stay credible and create lasting climate impact.

Learn more at 51toCarbonZero.com