



INDUSTRY ROADMAP

Supporting the decarbonisation of developing, producing
and running advertising in Aotearoa

The climate crisis is the biggest challenge we will face in our lifetime. UN Secretary General António Guterres urges that the scale of the challenge means “our world needs climate action on all fronts: everything, everywhere, all at once”. In response, the Advertising Industry in Aotearoa is showing up to ensure our industry fulfils its responsibilities to future generations and helps deliver a sustainable way of life for the 21st century and beyond.

Our ambition is to reduce the carbon impact of developing, producing, and running advertising to net zero, as well as contribute positively to a sustainable economic transition. This document outlines our approach and commitment to our ambition by sharing our framework, vision and approach. Our world moves fast, and the area of sustainability is continuously evolving; this document therefore is our best effort at the time of publishing in 2024 to categorise and address the issues, expecting however that our approach will evolve and adapt to new information over time.

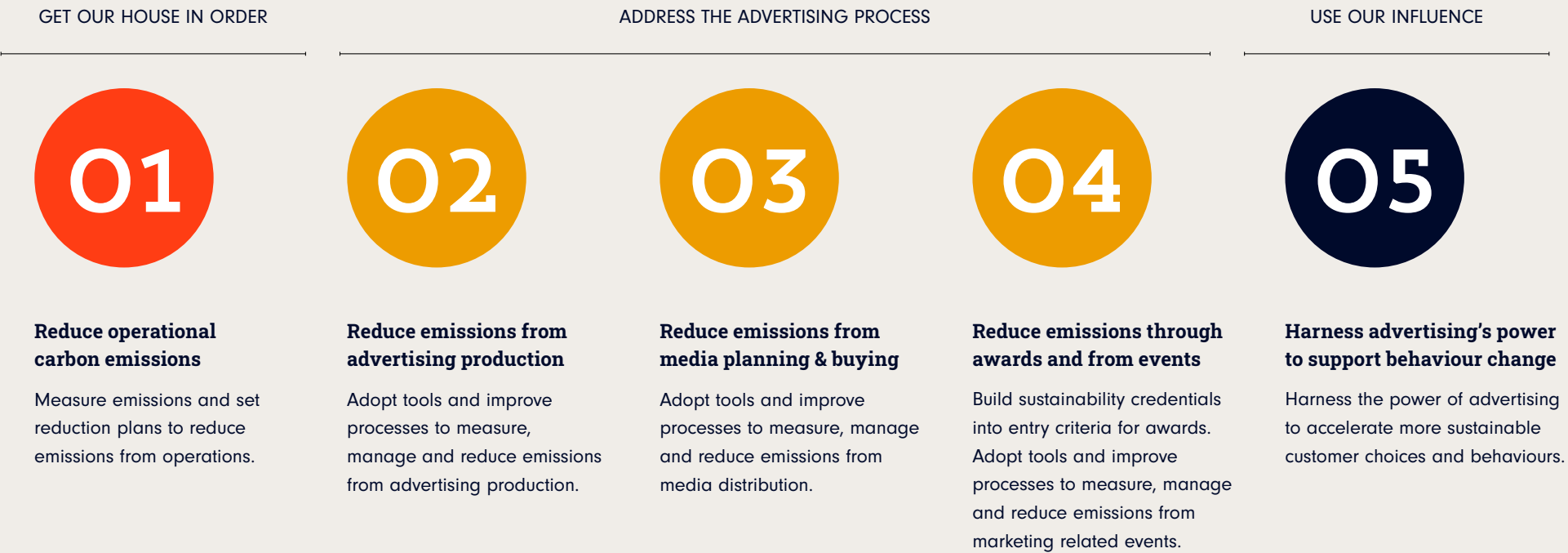
The insights organised into a strategic roadmap within this document came from six consultative sessions with invested Supporters of Ad Net Zero from across the industry. It is organised around the Ad Net Zero Global Framework, which has been adopted within Aotearoa as the leading collaborative initiative to support Advertising’s response to the climate crisis. Early drafts of the document were shared with the same groups for additional comment and buy-in. It will be used to guide the priorities and measure progress of the Ad Net Zero initiative within Aotearoa.

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ABOUT THE FRAMEWORK

The Ad Net Zero framework was first developed by the Advertising Association’s Climate Action Working Group in the UK in 2020. Since then it has been adopted in multiple countries, including the US. It is supported by Global companies eager to see its adoption streamlined across their markets.

Ad Net Zero’s five-point Action Plan provides our industry with a framework for its decarbonisation. The actions are:



The Sustainable Development Goals (SDGs) are the United Nation's blueprint to address the global challenges we face to achieve a better and more sustainable future for all. While all 17 Goals are interconnected, and arguments can be made for our industry's impact throughout, three goals speak directly to our aims.



We must change our consumption habits to be more sustainable

12.5 Substantially reduce waste generation through prevention, reduction, recycling and reuse

12.6 Adopt sustainable practices and integrate sustainability information into Corporate reporting cycles

12.7 Promote procurement practices that are sustainable

12.8 Ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature



We must transition to a low-carbon economy to limit global temperature rise to 1.5 degrees.

13.3 Improve education, awareness-raising and human and institutional capacity on climate change mitigation, adaptation, impact reduction and early warning



We must work together to solve the climate emergency

17.16 Enhance the global partnership for sustainable development, complemented by multi-stakeholder partnerships that mobilize and share knowledge, expertise, technology and financial resources, to support the achievement of the sustainable development goals

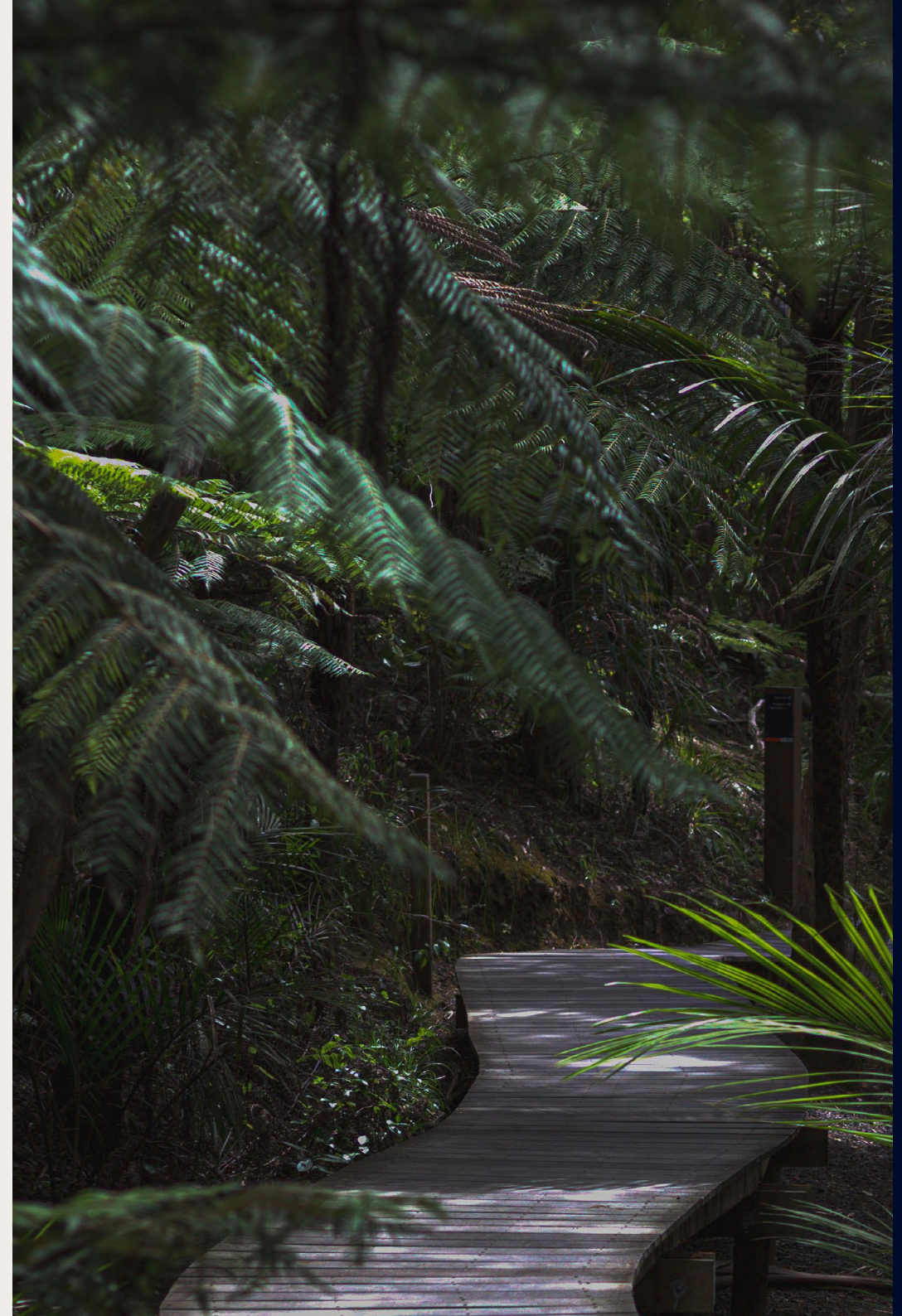
17.17 Encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnership

THE FRAMEWORK AT WORK IN AOTEAROA

Ad Net Zero launched in Aotearoa in August 2023 thanks to the collaborative and financial support of our Foundation, Agency and Production Supporters who rose to the challenge and committed to the ambition from the first ask.

All Supporters commit to measuring their carbon emissions within the first year of joining the initiative, and setting carbon reduction targets and strategies by the end of the second year of membership. They also participate in frequent working groups which will shape the future of our industry and whose priorities are drawn from this roadmap.

The Steering Committee is the advisory body charged with providing strategic direction, monitoring progress, and promoting Ad Net Zero's ambition to the industry. The committee is comprised of industry associations from across the industry.



OUR INDUSTRY'S IMPACT

We are only just beginning to unpack the true environmental cost of developing, producing, and running advertising. In 2020 advertising and marketing operations were estimated to represent 2-3%¹ of global greenhouse gas emissions. To provide context as we work to clarify the environmental impacts specific to Aotearoa, data from other markets are informing early assumptions about our industry's impact.



Average annual operational carbon footprint of a full-time employee in a UK advertising agency is 3.4 tonnes carbon dioxide equivalent (tCO₂e)²



The mean impact of producing a television ad that used Ad Green's measurement tools was 4.7 tCO₂e, with actuals ranging from 1.5kg to 129.6 tCO₂e³



Emissions per 1,000 programmatic ad impressions in Aotearoa is approximately 397.4 gCO₂PM⁴



Operational and attendee travel emissions for the Axis Awards 2023 averaged 0.047 tCO₂e per attendee and 27.09 tCO₂e for the whole event⁵



For context: 1 tonne is equivalent to the greenhouse gas emissions emitted from driving an average gas-powered car 4,100 km⁶

1. https://www.allianz.com/en/economic_research/insights/publications/specials_fmo/decarbonizing-information-technologies.html
<https://www.sciencedirect.com/science/article/pii/S2666389921001884>

2. Ad Net Zero Report - <https://adnetzero.com>

3. 2022 AdGreen Annual Review <https://weareadgreen.org/adgreen-annual-review-2022>

4. Scope3 State of Sustainability Report - Q1 2023, <https://how3mw87lyl.typeform.com/to/z0pJTDXU?typeform-source=www.scope3.com>

5. <https://commsCouncil.nz/ad-net-zero>

6. <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator#results>

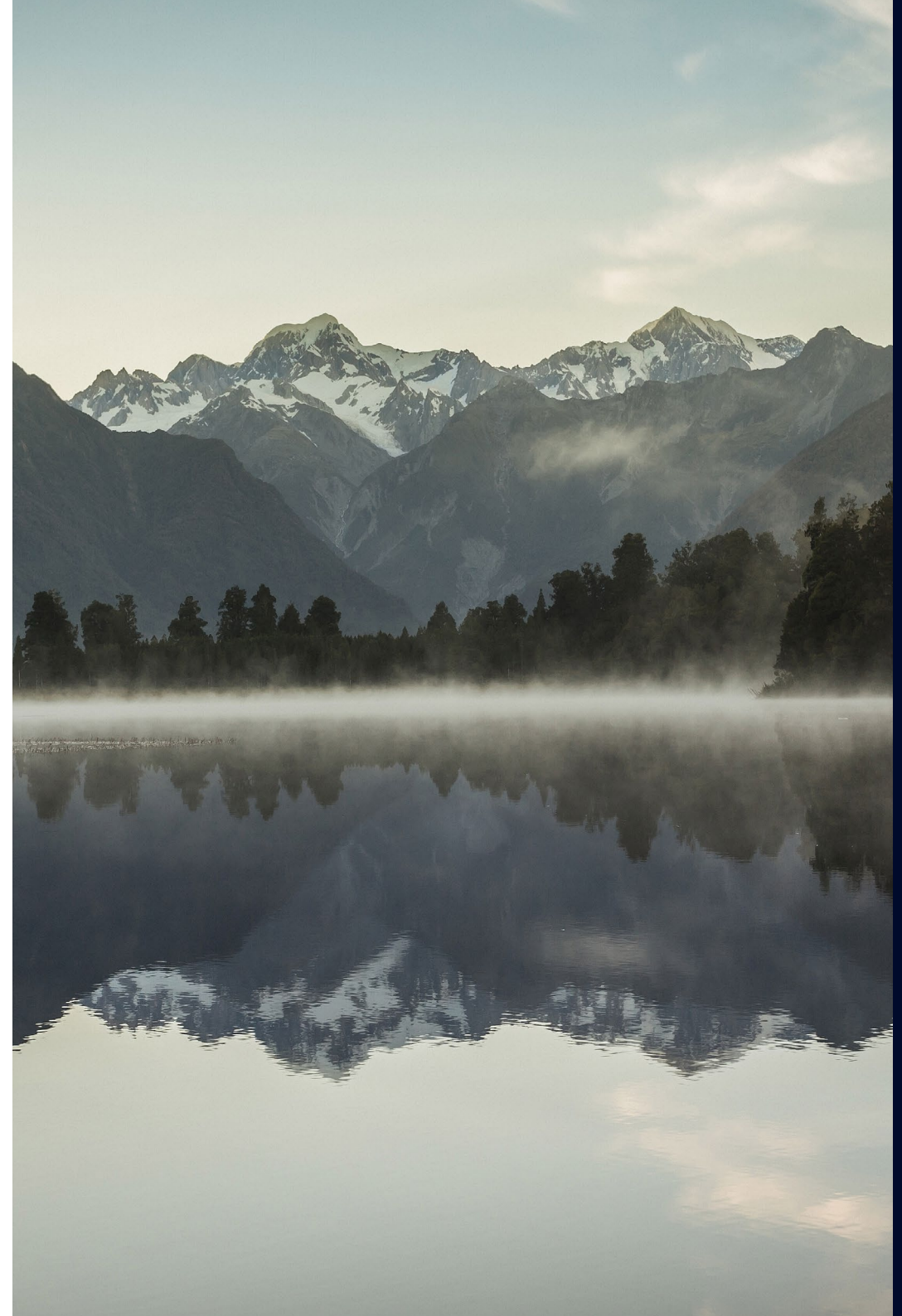
OUR VISION FOR THE INDUSTRY

Ensuring that our industry can operate under a low-carbon model is critical to our future success.

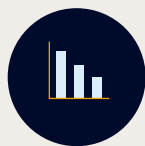
While all industries should be concerned about future viability in a low-carbon economy, there's something special about our industry. We produce work that connects with millions of people every single day, providing them with information on all aspects of our culture and the way we live our lives. Our role in inspiring consumers to make a shift to more sustainable purchasing and lifestyle decisions is a humbling responsibility.

This work requires the bravery to face uncomfortable truths and course correct where needed. There is no perfection in sustainability efforts, only sincere action. The launch of Ad Net Zero in 2023 marked the beginning of a course correction for our industry. Our Industry's response to climate change is nascent, but there is a strong willingness and ambition to take action.

The following two pages introduce where our industry is today and the transformation we hope to achieve by 2050.

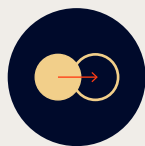


WHERE WE ARE TODAY



Measure & Reduce Carbon

- Our industry at large is not on track to meet the Paris Agreement's targets to limit global temperature rise to 1.5 degrees Celsius.
- Sustainability efforts are active in some organisations, but they are based on individual corporate efforts with limited standardisation or larger oversight at an industry level.



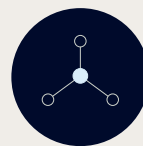
Influence a Sustainable Transition

- There is an inherent tension between advertising, consumption and the climate crisis.
- Little guidance exists that encourages advertisers to passively support sustainable behaviours in their campaigns.
- Client and Supplier support for investment in more sustainable opportunities is inconsistent.



Make Educated Decisions

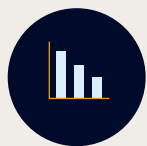
- Some organisations are fearful of the reputational risk of doing the wrong thing and do not have a clear starting point.
- Little data is available to make educated decisions on carbon reduction. Data that exists is not easily comparable. Understanding of the carbon impacts of advertising is low, which can de-prioritise efforts.
- Accidental greenwashing is a risk due to a lack of clear guidance and understanding on how to communicate appropriately.



Influence a Promising Future

- There is a need to protect our businesses against future business disruption.
- Industry is at risk of not being ready for quick moving regulatory pressures.
- Industry is at risk of not being ready for client pressures.

BY 2050 WE HOPE TO BE ABLE TO CONFIDENTLY CLAIM THE FOLLOWING:



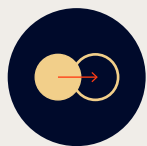
Measure & Reduce Carbon

- In line with the Paris Agreement, our industry's emissions reach net zero by 2050
- Offsets are considered a last resort and companies have a reduction-first mentality.
- Commercial outcomes and Sustainable outcomes are aligned, and Sustainability is a standardised Operating Model that everyone is subscribed to.



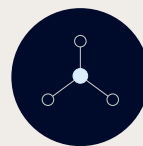
Make Educated Decisions

- Industry talent is educated and excited about delivering sustainable outcomes.
- High-quality data is readily available from standardised, universally adopted methodologies that people understand.
- Advertisers have clear reference points for responsible sustainability claims and recognise the danger of misrepresenting their current state.



Influence a Sustainable Transition

- Advertising plays an intentional role in normalising sustainable behaviours.
- Consumers are educated and given clear, simple guidance on how to make sustainable choices.
- Suppliers and Clients are partners in our efforts to reduce emissions and create a positive influence.



Influence a Promising Future

- Advertising is flourishing under a low-carbon model. Industry has secured its license to operate responsibly. It is perceived to be leading and is a stronger industry because of its transformation.
- Industry is staying ahead of regulation by responding to the climate crisis effectively and is seen as a partner by regulatory bodies.

WORKING TOWARDS OUR VISION: A ROADMAP FOR OUR INDUSTRY

Inspired by our vision for 2050, initiatives will address at least one of four thematic areas that will operate simultaneously across the Ad Net Zero framework.

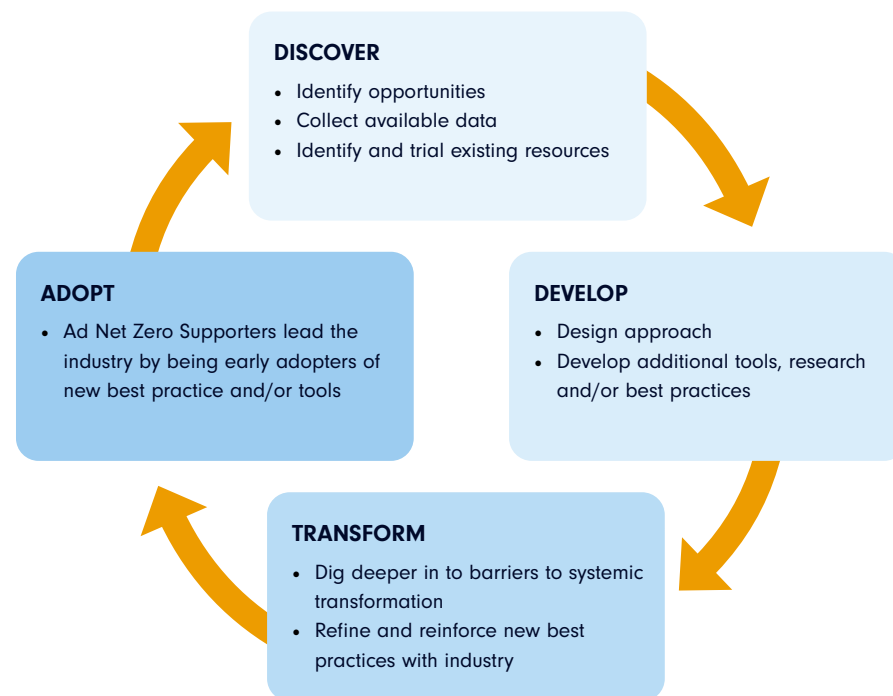
Measure – Work towards the availability of high-quality data from standardised, universally adopted methodologies that people understand.

Educate – Work towards a talent pool that is educated and excited about delivering sustainable outcomes.

Reduce – Work towards an industry-wide carbon emission reduction trend that aligns with the Paris Agreement.

Influence – Work towards an industry that plays an intentional role in normalising sustainable behaviours, and whose talent have clear reference points for responsible sustainability claims.

Progress on initiatives will be measured by where it sits within a simplified life cycle adoption curve. The aim of all efforts is to transform the industry so that the new approach becomes best practice across the entire industry. Anything developed by Ad Net Zero will be made available to the entire industry, no matter their Supporter status. By developing and supporting industry-level solutions, our industry can transition faster and more efficiently.



ACTION 01

EMISSIONS FROM OPERATIONS

By 2030 Ad Net Zero Supporters measure their emissions, have set a science-based target and reduction plan, and are confident identifying and acting on operational reduction opportunities.



ACTION 01: OPERATIONAL EMISSIONS

MATURITY

DISCOVER

DEVELOP

TRANSFORM

ADOPT

IN PROGRESS

COMPLETE

			2024				2025			
DESIRED OUTCOME		ACTION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
MEASURE	Industry has published an annual State of the Industry report which assesses impact of Advertising in Aotearoa.	Emissions and survey data will be collected from Supporters and compiled.	<div></div>	<div></div>	<div></div>					
	Supporters have created an annual emissions inventory.	Partnership with Toitū will be leveraged to provide Supporters access to emission measurement tool. Supporter Learning Groups will be facilitated to support and maintain momentum.	<div></div>	<div></div>						
	Supporters have set a Science Based Target and Reduction Plan.	Supporter Learning Groups will be facilitated to support development and maintain momentum.				<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
EDUCATE	Supporters are comfortable identifying high-carbon operational emission areas and generic reduction solutions.	Working Group agendas and pre-reads will incorporate learning opportunities. Industry-wide webinars will be developed. Sustainability as a topic will be incorporated within Comms Council learning & development curriculums.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
REDUCE	Supporters have identified and prioritised opportunities to address emission areas (eg., travel, procurement) which would benefit from industry collaboration.	Using the State of the Industry Report & individual emission inventories the Working Group will compare common areas of impact. The Working Group will discuss barriers to reduction that would benefit from industry collaboration. Opportunities will be prioritised.			<div></div>	<div></div>				
	Supporters have addressed at least one of the identified emission-reduction opportunities by crafting a new approach for industry adoption eg., policy, tool, process.	From prioritised list of initiatives, at least one initiative will be selected for industry collaboration. An approach will be drafted and feedback from the Working Group incorporated until it is endorseable and ready for adoption by Supporters.					<div></div>	<div></div>	<div></div>	<div></div>

ACTION 02

EMISSIONS FROM PRODUCTION OF ADS

By 2030 Ad Net Zero Supporters measure the emissions from the production of ads, are confident identifying and acting on reduction opportunities throughout the production process, and incorporate sustainability considerations throughout the life of each project.



ACTION 02: PRODUCTION EMISSIONS

MATURITY

DISCOVER

DEVELOP

TRANSFORM

ADOPT

IN PROGRESS

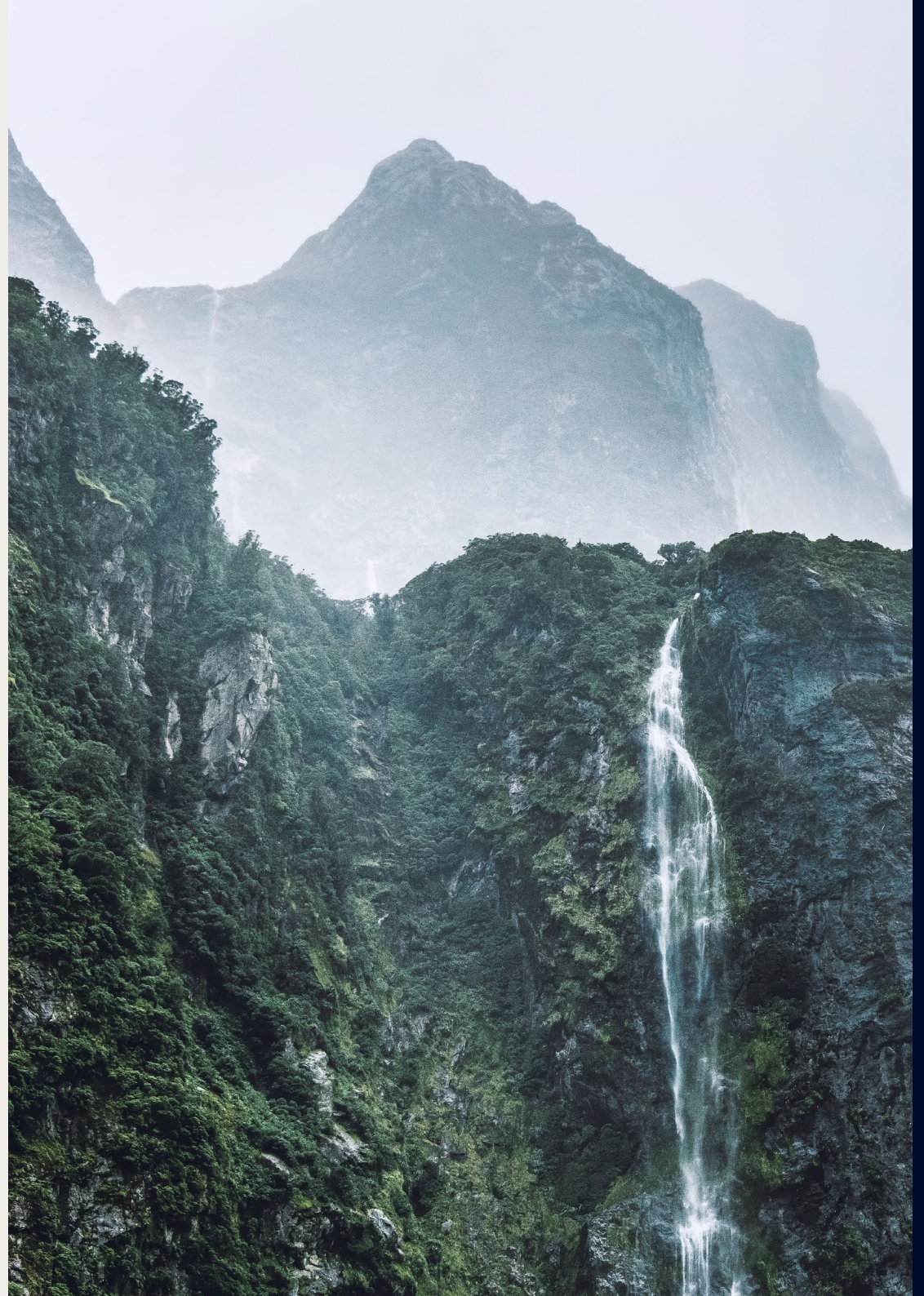
COMPLETE

			2024				2025							
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
MEASURE		DESIRED OUTCOME	ACTION											
		Supporters have endorsed Production Emission measurement tools for Industry adoption.	Supporters will be educated on GreenLit, AdGreen and any other production emission measurement tools that are brought forward. Supporters will trial tools and provide feedback to the Working Group. A consensus on next steps will be reached including need to develop tool(s) further and/or endorse industry adoption.				<div></div>	<div></div>	<div></div>	<div></div>				
		Use of Production emission measurement tools is a best practice adopted by all Supporters.	Supporters will work within their own organisations to change internal best practices to incorporate use of production emission measurement tools. Barriers to adoption and additional feedback will be brought to the Working Group for discussion and solutioning. Additional tools, such as presentation decks and client education will be developed as needed.								<div></div>	<div></div>	<div></div>	<div></div>
EDUCATE		Supporters are comfortable identifying high-carbon production emission areas and generic reduction solutions.	Working Group agendas and pre-reads will incorporate learning opportunities. Industry-wide webinars will be developed.				<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
REDUCE		Supporters have identified and prioritised opportunities to address emission areas (eg., supplier engagement, client education, electrical hook-ups at common shooting locations) which would benefit from industry collaboration.	Using common impact areas identified in GreenLit and AdGreen toolkits, Working Groups will discuss opportunities that would benefit from industry collaboration. Opportunities will be prioritised.						<div></div>	<div></div>				
		Supporters have addressed at least one of the identified emission-reduction opportunities by crafting a new approach for industry adoption eg., policy, tool, process.	From prioritised list of initiatives, at least one initiative will be selected for industry collaboration. An approach will be drafted and feedback from the Working Group incorporated until it is endorseable and ready for adoption by Supporters.								<div></div>	<div></div>	<div></div>	<div></div>

ACTION 03

EMISSIONS FROM MEDIA PLANNING & BUYING

By 2030 Ad Net Zero Supporters measure the emissions attributed to media distribution, are confident identifying and acting on reduction opportunities, and incorporate sustainability considerations within decision making.



ACTION 03: MEDIA EMISSIONS

MATURITY

DISCOVER

DEVELOP

TRANSFORM

ADOPT

IN PROGRESS

COMPLETE

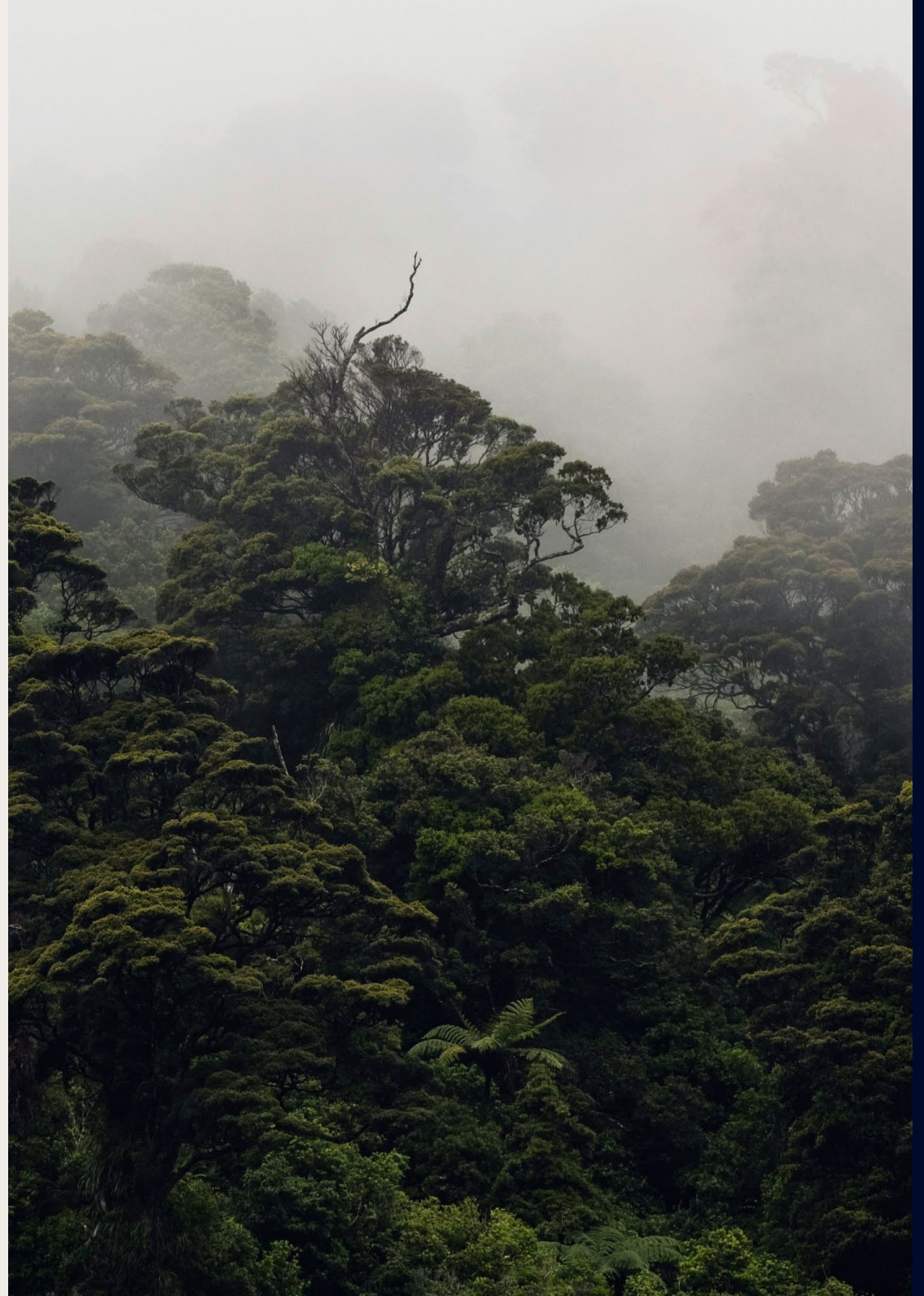
			2024				2025			
			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
MEASURE	Working Groups have endorsed a Media Emissions Methodology for Industry adoption.	Supporters are educated on Ad Net Zero Global/GARM's Media Emission Methodology. Supporters will review and provide feedback on its applicability to our market and suitability to move into trial phase.		<div></div>	<div></div>	<div></div>				
	Supporters have trialled a Media Emission methodology across Advertising mediums.	Supporters will begin trialling Ad Net Zero Global/GARM's Media Emission Methodology and provide feedback to the Working Group. A consensus on next steps will be reached including need to develop further and/or endorse for industry adoption.					<div></div>	<div></div>	<div></div>	<div></div>
EDUCATE	Supporters are comfortable identifying high carbon media emission areas and generic reduction solutions.	Working Group agendas and pre-reads will incorporate learning opportunities. Industry-wide webinars will be developed.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
REDUCE	Supporters have reviewed GARM's Quick Action Guide and identified and prioritised opportunities to address emission areas (eg., supplier engagement, client education) which would benefit from industry collaboration.	Using common impact areas identified in GARM's Quick Action Guide, Supporters will discuss opportunities that would benefit from industry collaboration. Opportunities will be prioritised. Supporters will also report back to the Working Group on actions from the guide they are taking within their own organisation.	<div></div>	<div></div>						
	Supporters have addressed at least one of the identified emission reduction opportunities by crafting a new approach for industry adoption eg., policy, tool, process.	From prioritised list of initiatives, at least one initiative will be selected for industry collaboration. An approach will be drafted and feedback from the Working Group incorporated until it is endorseable and ready for adoption by Supporters. Supporters will also report back to the Working Group on additional actions from the guide they are taking within their own organisation.			<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

ACTION 04

EMISSIONS FROM AWARDS & EVENTS

By 2030 Ad Net Zero Supporters measure the emissions attributed to marketing related events and activations, are confident identifying and acting on reduction opportunities, and incorporate sustainability considerations within decision making.

Industry Awards leverage their influence to encourage environmental responsibility considerations throughout their judging criteria, categories and eligibility criteria.



ACTION 04: AWARDS & EVENTS EMISSIONS

MATURITY

DISCOVER

DEVELOP

TRANSFORM

ADOPT

IN PROGRESS

COMPLETE

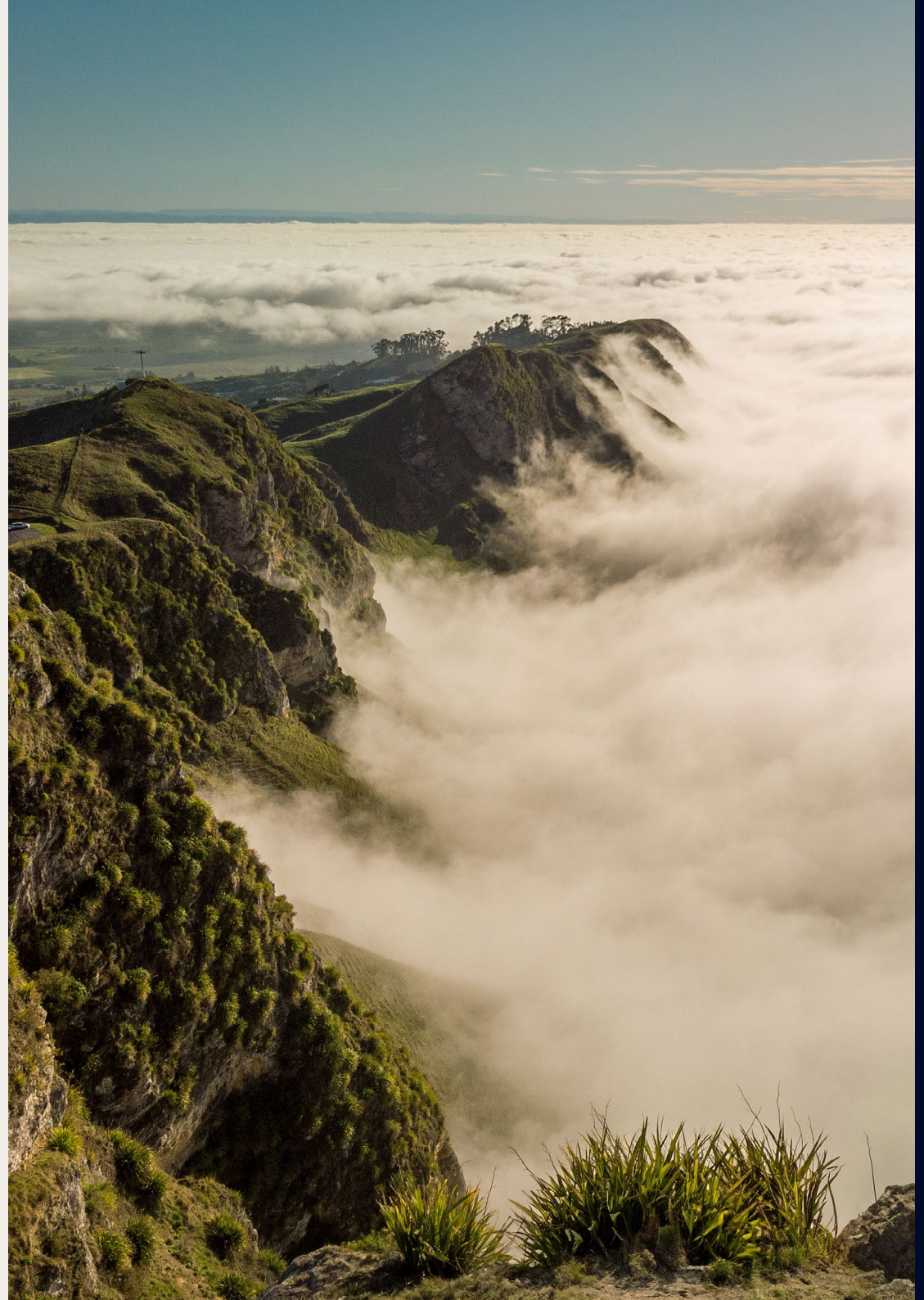
			2024				2025			
DESIRED OUTCOME			Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
MEASURE	Supporters have endorsed an Event Emission Measurement tool.	Supporters will conduct a market investigation of available emission measurement and reduction tools for events. Supporters will trial tools and provide feedback to the Working Group. A consensus on next steps will be reached including need to develop tool(s) further and/or endorse industry adoption.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
EDUCATE	Supporters are comfortable identifying high carbon event emission areas and generic reduction solutions.	Working Group agendas and pre-reads will incorporate learning opportunities. Industry-wide webinars will be developed.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
REDUCE	Supporters have identified and prioritised opportunities to reduce emission areas (eg., catering, travel) which would benefit from industry collaboration.	Using common impact areas identified through trialing event emission measurement tools. The Working Group will discuss opportunities that would benefit from industry collaboration. Opportunities will be prioritised.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Supporters have addressed at least one of the identified emission-reduction opportunities by crafting a new approach for industry adoption eg., policy, tool, process.	From prioritised list of initiatives, at least one initiative will be selected for industry collaboration. An approach will be drafted.							<div></div>	<div></div>
INFLUENCE	Supporters have conducted additional Stakeholder discovery.	Supporters will identify influential stakeholders who develop awards and events. Supporters will consult with stakeholders, invite to the working group, and ask for a commitment to the aims of Ad Net Zero.	<div></div>	<div></div>						
	Supporters have submitted a detailed recommendation on an approach to leverage sustainability criteria within awards.	Supporters will review existing models, debate approaches, and arrive at a recommendation for a phased-in approach to incorporating environmental criteria in to awards in a responsible manner.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

ACTION 05

HARNESS ADVERTISING'S POWER TO SUPPORT BEHAVIOUR CHANGE

By 2030 Advertisers have clear reference points for responsible environmental claims and recognise the danger of misrepresenting their current state.

Advertisers have clear reference points for harnessing the power of marketing communications to support a sustainable economic transition.



ACTION 05: BEHAVIOUR CHANGE

MATURITY

DISCOVER

DEVELOP

TRANSFORM

ADOPT

IN PROGRESS

COMPLETE

			2024				2025			
DESIRED OUTCOME		ACTION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
EDUCATE										
	Supporters are comfortable avoiding greenwashing and identifying opportunities to normalise sustainable behaviours within campaigns.	Working Group agendas and pre-reads will incorporate learning opportunities. Industry-wide webinars will be developed.	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
INFLUENCE										
	Supporters have submitted a detailed recommendation to the ASA of updated Greenwashing Standards.	Supporters will review existing standards and international examples, debate issues and terms, and arrive at a detailed recommendation for updated Greenwashing Standards.	<div></div>	<div></div>	<div></div>	<div></div>				
	The ASA has approved updated Greenwashing Standards.	Supporters will work with the ASA to progress Greenwashing Standards through their approval process.					<div></div>	<div></div>	<div></div>	<div></div>
	Supporters have published resources that support the Positive Influence our Industry can have on normalising sustainable behaviours.	Supporters will review existing work, discuss opportunities, prioritise action and draft resources eg., a Quick Action Guide outlining opportunities to normalize sustainable behaviours and have a positive influence in campaigns.	<div></div>	<div></div>	<div></div>	<div></div>				
	Supporters have begun trialling opportunities for normalising sustainable behaviour within their campaigns.	Supporters will distribute resources internally and with clients/suppliers. Supporters will begin asking whether there are opportunities to have a positive influence during a campaign's development process. Successes and barriers will be shared with the Working Group to create next steps for wider adoption.					<div></div>	<div></div>	<div></div>	<div></div>

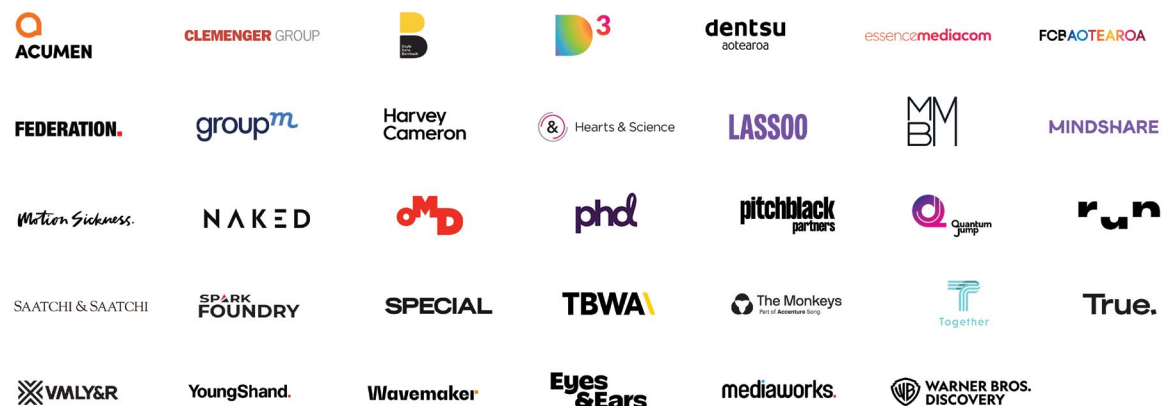
AD NET ZERO SUPPORTERS

Thank you for joining us on this journey. This important initiative would not be possible without support and collaboration from:

FOUNDATION SUPPORTERS:



SUPPORTERS:



INDUSTRY SUPPORTERS:

