

ADVERTISED EMISSIONS

THE CARBON EMISSIONS
GENERATED BY UK ADVERTISING

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EXECUTIVE SUMMARY

Advertising is a \$600 billion industry and every day, virtually every human on the planet is touched and influenced by it on their phone, TV, radio, billboard or computer. **It is arguably the biggest engine of societal change in existence.** The advertising industry therefore plays a vital role in determining whether the world will successfully transition towards a low-carbon, sustainable society.

As the engineers of demand, advertising can fast forward the adoption of goods, services, behaviours and attitudes which are consistent with a profitable and progressive transition to a Net Zero economy. To do this, the advertising industry requires a framework to enable discussion and fact based analysis so those who commission, create, place, display and regulate advertising can measure and reduce the emissions associated with the consumption it generates.

Borrowing from the idea of Financed Emissions, already established within the finance industry, 'Advertised Emissions' is offered as the idea and methodology to achieve this. **Advertised Emissions are the greenhouse gas (GHG) emissions that result from the uplift in sales generated by advertising.**

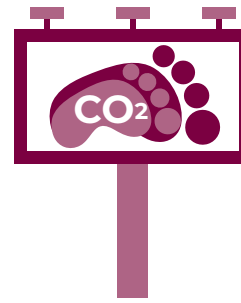
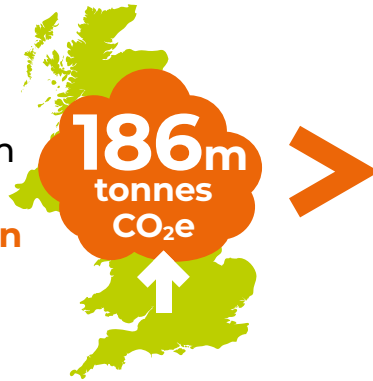
The adoption of Advertised Emissions would enable the industry to move beyond measuring just its operational footprint to measuring the emissions connected to its core function in society. It can then begin to purposefully direct its unique skills of creativity, imagination, planning, analytics and activation towards tackling our climate emergency.

To illustrate how the concept works, this report includes new research on the extent of Advertised Emissions for all UK advertising in one year. This uses known and widely accepted sources on advertising spend, emissions, and supply chains. Additionally it deploys the new advertising research community (ARC) database which brings together – for the first time – results that show advertising's return of investment for hundreds of real-life UK advertising campaigns evaluated using econometrics.

THE RESEARCH FINDS THAT:

- **In 2019, Advertised Emissions from UK advertising were more than 186 million tonnes of carbon dioxide equivalents.**
- **This is almost half the size of the UK's total domestically produced emissions in 2019**
- **It is equivalent to 47 coal-fired power plants running for 1 year**
- **186 times bigger than the operational emissions of the UK advertising industry**
- **It means advertising is adding an extra 28% to the annual carbon footprint of every single person in UK**

In 2019,
Advertised Emissions from UK advertising were **more than**



It means advertising is adding an **extra**
+ 28%
to the **annual carbon footprint of every single person in UK**

Embracing Advertised Emissions offers the opportunity for deep collaboration amongst the organisations, and people in them, who control the presence and content of advertising in society. To decide how to coordinate and take decisive action to reduce Advertised Emissions. This report offers a strategic framework and suggested actions for discussion:

RED BRANDS

High carbon brands and industries with little opportunity to re-engineer demand towards low carbon alternatives.

Suggested action: Reduce spend

AMBER BRANDS

Established brands and industries that can accelerate the adoption of lower-carbon attitudes and behaviours.

Suggested action: Transition the spend away from high-carbon products and services to lower-carbon alternatives

GREEN BRANDS

New and emerging brands and industries whose business model is geared to serving a 1.5°C world.

Suggested action: Increase spend

A reduction in environmentally harmful advertising does not necessarily lead to a reduction in income. In purposefully reducing consumption-related emissions, the advertising industry has the opportunity to reinvent itself and increase its relevance and profitability. **From demand-creator of the industrial age to participation-driver of the regenerative age.** It can take advantage of the trillions of dollars spent on supply-side reinvention, translating this into demand-side desire.

RECOMMENDATIONS

Recommendations for the UK advertising industry, which are replicable in other markets:

- The **widespread recognition of Advertised Emissions** across the advertising ecosystem.
- Industry bodies (such as the Advertising Association and ISBA), with the support of the regulator and involvement of stakeholder groups, to **champion and encourage the embedding of Advertised Emissions** across the ecosystem.
- The **integration of Advertised Emissions into advertiser and agency emissions reporting** and therefore part of those organisations credible, science-aligned net zero plans.
- An **independent scientific expert body (such as the Science Based Target Initiative) to produce common rules for accounting for Advertised Emissions** and for setting science-aligned goals and targets for their reduction, to ensure credibility.
- Willing members of the ecosystem to **co-create a tool that all relevant organisations in the ecosystem can use to measure and reduce their Advertised Emissions.** Purpose Disruptors are happy and willing to host and lead this process.

The choices of those who work in the advertising industry echo across society. As we enter the decisive decade on climate, those choices also echo across time. Advertised Emissions enables those in the industry to take full responsibility for their choices and actions and by working together, shift the industry towards halving its emissions by 50% by 2030 and achieving net zero emissions by 2050, if not sooner.

AUTHORS ACKNOWLEDGEMENTS

LEAD AUTHORS

Jonathan Wise is co-founder of Purpose Disruptors, a community based organisation of advertising insiders working together to reshape the industry. Alongside Advertised Emissions, key projects are #ChangeTheBrief Alliance and GoodLife2030. Jonathan has 15 years experience as a strategist in leading advertising agencies, working on clients such as Nestle, Kraft Foods, Diageo, Shell and the BBC. He has won numerous awards including a Gold IPA Effectiveness Award. He holds a Masters in Sustainability and Responsibility from Ashridge Business School.

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ABOUT THE REPORT

The report was commissioned by Purpose Disruptors with the generous support from JJ Charitable Trust, the Climate Change Collaboration and the KR Foundation.

The estimates of Advertised Emissions in this analysis are produced using publicly available information and should not be seen as conclusive or final, nor do they cover the full range of activities. The figures presented in this report should be seen as indicative estimates only. The information in this report, or on which this report is based, has been obtained from sources that the authors believe to be reliable and accurate. The statements in this report are those of the Purpose Disruptors only.

Report design by Winnie Lee: www.winnielee.net

This report is dedicated to those who came before us – those that have enabled Financed Emissions to be acknowledged and adopted by the finance industry. And those we hope will come after us – the Big 4 accountancy firms, management consultants and law firms who have the opportunity to acknowledge and adopt the nascent idea of Advisory Emissions.

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INTRODUCTION AND DEFINITION OF ADVERTISED EMISSIONS

We are deep into a climate emergency.

To meet the Paris Agreement goals, global warming must be limited to well below 2°C, preferably to 1.5°C, compared to pre-industrial levels¹. To achieve this the UN states that greenhouse gas (GHG) emissions² must fall by 50% by 2030 and reach net zero emissions not later than 2050³.

For this to happen, those creating the emissions that cause climate change need to take responsibility for measuring their current contribution and take action to reduce them. A key challenge for the advertising industry is to define who is responsible for what emissions so as to create an appropriate framework and metric to measure and reduce them.

Without a metric discussion becomes personal and subjective. Without a metric, success can't be included in KPI frameworks, marketed to attract talent or shared with an oversight committee for inclusion in ESG⁴ targets.

This report provides that metric: the idea, definition and methodology to enable those who commission, create, place, display and regulate advertising to measure and reduce the emissions associated with the consumption it generates.

We call this **Advertised Emissions**.

Advertised Emissions are the GHG emissions that result from the uplift in sales generated by advertising.

We define 'advertising' as paid-for messages designed to drive consumption of goods and services.

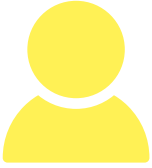
Advertised Emissions can enable discussion and dispassionate, fact based, analysis of the effect advertising-driven demand is having on climate change.

1 <https://unfccc.int/process-and-meetings/the-paris-agreement/the-paris-agreement>

2 'Greenhouse gas emissions' (GHG) refer to carbon dioxide and the five other gases set out in the Kyoto protocol (methane, nitrous oxide, hydrofluorocarbons, perfluorocarbons and sulphur hexafluoride)

3 <https://www.un.org/press/en/2020/sgsm20411.doc.htm>

4 ESG stands for 'Environmental, Social, and Corporate Governance'



Therefore, the audience for this report includes:

- 1 Those that **pay to make and place the advertising** – the brand owners who invest in marketing communications to promote their products and services
- 2 Those that **create the advertising and place it** – advertising and marketing communications agencies, including media agencies
- 3 Those who **display the creative work** – media owners such as digital platforms, TV stations, newspapers and magazines
- 4 Those that **have a role in regulating the presence of advertising** – regulators and government
- 5 Those that **promote the value of advertising in society** – trade bodies

These organisations, and the people in them, make up the ecosystem that controls the presence and content of advertising in society.

Together, they represent a powerful cultural force with the gift and responsibility to shift advertising's role in shaping the current, high-consumption landscape towards a low-consumption alternative.

Adopting Advertised Emissions can be a common currency that can activate radical collaboration and create a shared goal. For those across the ecosystem to work together and make the necessary changes as they take full responsibility for their climate impact.

This has already been done in Finance. They have an established metric called Financed Emissions which measures the greenhouse gases produced by different investments. Advertised Emissions provides the advertising industry with the opportunity to do the same.

WHY ARE ADVERTISED EMISSIONS IMPORTANT?

Advertising and marketing communications is a \$600 billion industry. Every day, virtually every human on the planet is touched and influenced by advertising on their phone or via TV, radio, billboard or computer. Advertising is arguably the biggest engine of societal change in existence.

As such, **the sector has a vital role in determining whether the world will successfully transition towards a low-carbon, sustainable economy,** through the messages it chooses to make and put out into the world. The gravity and scale of this responsibility is made plain on page 2 of the Paris Agreement:

“...sustainable lifestyles and sustainable patterns of consumption and production, with developed country Parties taking the lead, play an important role in addressing climate change”.⁵

To date, a vast amount of work has been done on the supply side, in transforming the global economy to help address our climate emergency. Energy grids are transitioning to renewables, companies are sourcing sustainable raw materials at scale and governments are reforming policy for a decarbonised world.

We are now at a critical inflection point where the same level of ambition and change now needs to occur on the demand side.

We need to re-architect people’s demands and expectations towards more sustainable, lower-emission products and services, and make them attractive and desirable.

As the **engineers of demand**, the advertising and marketing communications industry is uniquely placed to rise to this challenge and meet this need.

⁵ https://unfccc.int/sites/default/files/english_paris_agreement.pdf

Advertising is not a big direct source of emissions like some industrial sectors. But it is probably the most powerful systemic amplifier. Whatever comes into its projection space gets amplified into society. This means that advertising has real power to speed up the pace of transition. It can accelerate change, through changing what it chooses to project into society. **As engineers of demand, it can accelerate the rate of growth and share, adoption and acceptance, for lower-emission alternatives.**

It can bring to the cultural foreground the hard work of millions of others working to help tackle our climate emergency. It can deploy its brilliance in shaping societal desire and hasten a more sustainable future into the present.

For the world needs help imagining the possibilities of a low carbon future. This is not the job of scientists or even government. This is the responsibility of creatives and storytellers – the people who spend their lives seeding ideas about ‘how life is lived these days’.

At present, the industry is focused on minimising the footprint of making and placing advertising. That, worthy as this is, it is just getting its house in order.

The industry’s challenge for the next decade is to turn its skills of creativity, imagination, planning, analytics, and activation to drive tangible transformation in society – not just in the production process.

Advertised Emissions provides the concept and currency to facilitate this task.

Advertising has, for many years, been able to isolate and quantify the economic contribution that it makes to individual businesses and the economy in the form of growth in sales and revenue. Similarly, much work has been done to quantify the carbon impact of a multitude of products and services that advertising promotes. The concept of Advertised Emissions brings these two bodies of work together.

By adopting a common framework for measuring advertising’s impact on emissions, the industry’s best minds can contribute to the urgent societal task of reducing them. In doing so, the industry can reassert leadership and relevance for its output.

WHY NOW?

Advertised Emissions enables the advertising industry to take the next step on its climate journey, keep pace with peers in the finance industry and proactively contribute towards the UK's ambitious climate target:

THE NEXT STEP ON THE INDUSTRY'S CLIMATE JOURNEY

Vital contributors to the advertising industry are advertising, marketing communications and production agencies. To date, these businesses have made an important first step in acknowledging their relationship with climate change and taking action. In its influential Ad Net Zero report, the UK's Advertising Association promotes the measurement and reduction of emissions for advertising and marketing communications agencies in three areas:

1. Offices and travel associated with meetings
2. Production of adverts via the AdGreen Calculator
3. Placement of adverts via the Media Carbon Calculator

WPP, the world's largest advertising company, was the first of the big 6 agency groups to provide definitive net zero commitments across their operations and supply chain. Similar to the Ad Net Zero report, their commitments relate to running the agencies and the production and placement of the creative work.

We can consider these sets of recommendations and commitments as 'Advertising's Emissions'. The internal emissions associated with the making and placing of the creative work. We can see this as the industry 'getting its house in order' as it goes through the first step of acknowledging and accepting that it has emissions to consider.

To date, none of the existing net zero or climate commitments by advertising and marketing communications agencies include the impact in relation to the creative or promotional work they produce. The reason why they exist.

Advertised Emissions therefore represents the next logical step. To move from the baseline emissions associated with running the business to the emissions associated with the reason the organisation exists:

STEP 1

STEP 2

	ADVERTISING'S EMISSIONS	ADVERTISED EMISSIONS
WHAT IS MEASURED	Carbon emissions that result from the running of advertising agencies and making and placing work	Carbon emissions that result from the uplift in sales generated by advertising
FOCUS AREAS	<p>Measuring and reducing the emissions as an output created by advertising:</p> <ul style="list-style-type: none"> • Running an advertising agency (offices, travel) • Making advertising (the production process) • Displaying the advertising (the media used to show the ads) 	<p>Measuring and reducing the emissions as an outcome directly caused by advertising:</p> <ul style="list-style-type: none"> • The result of incremental sales and consumption directly attributable to advertising • Includes emissions along the end to end supply chain from production to disposal of a product • With proven attribution to a paid-for communication including paid for advertising, direct mail, sponsorship, PR
CURRENT COMMITMENTS	<ul style="list-style-type: none"> • Advertising Association's Ad Net Zero Plan • WPP Net Zero Plan • Dentsu Net Zero Plan • IPG as part of amazon's Climate Pledge to become Net Zero by 2040 • Publicis plan to be Net Zero by 2030 • Havas plan to reduce GHGs by 60% by 2025 	None



KEEPING UP WITH OTHER INDUSTRIES

The finance industry is fundamental to the economy and the health of our society. It underpins all economic activity that supports businesses and livelihoods. So does advertising. It adds around £100 billion to UK GDP by increasing the level of economic activity and increasing the productivity of the economy⁶.

In the finance industry, the idea of taking full responsibility for its emissions was first introduced in 2012⁷. The concept of Financed Emissions is well-established.

Financed Emissions are defined as 'the greenhouse gas emissions associated with a financial institution's loans and investments in a reporting year'.⁸ So, if HSBC helps finance the development of a new coal-fired power station, then the emissions associated with building and running that power station are part of HSBC's Financed Emissions.

Financed Emissions enable organisations in the finance industry to move from just reporting the emissions associated with running their businesses to reporting the emissions associated with the industry's core function in society.

They are included within a financial institution's Scope 3 emissions, as determined by the GHG Protocol, as they are "downstream emissions that occur as a consequence of using the organization's products or services".⁹

Financed Emissions of the UK financial institutions are 805 million tonnes of CO₂e.¹⁰ This is 700x larger than the direct emissions generated by the sector.¹¹

6 <https://adassoc.org.uk/credos/advertising-pays-how-advertising-fuels-the-uk-economy/>

7 https://www.ran.org/the-understory/financed_emissions_a_big_problem_for_banks_and_a_bigger_problem_for_the_climate/

8 https://www.wwf.org.uk/sites/default/files/2021-05/uk_financed_emissions_v11.pdf

9 <https://carbonaccountingfinancials.com/files/downloads/PCAF-Global-GHG-Standard.pdf>

10 https://www.wwf.org.uk/sites/default/files/2021-05/uk_financed_emissions_v11.pdf

11 <https://www.cdp.net/en/articles/media/finance-sectors-funded-emissions-over-700-times-greater-than-its-own>

The industry has embraced the idea and formed the Partnership for Carbon Accounting Financials (PCAF). Created in 2015 by Dutch financial institutions, it scaled globally in 2019. Members of the PCAF Global Core Team include representatives from Morgan Stanley, ABN-AMRO, First Rand and Bank of America. PCAF was created to help financial institutions assess and disclose their Financed Emissions through assisting in the measurement and disclosure of GHG emissions associated with six asset classes: Listed equity and corporate bonds, business loans and unlisted equity, project finances, commercial real estate, mortgages and motor vehicle loans.

Examples of Financed Emissions being adopted by the finance sector:

- **Barclays**, the UK bank, has stated it will calculate its Financed Emissions across energy and power sectors as well as cement, steel and aluminium. It aims to reduce its power portfolio's emissions intensity by 30% and its energy portfolio's emissions by 15% by 2025. It will publish cement, steel and aluminium targets in 2022¹²
- **HSBC** plans to set sectoral financed emission targets consistent with achieving net zero by 2050¹³
- **The Glasgow Finance Alliance**, which contains over 160 firms together responsible for assets in excess of \$70 trillion have voluntarily agreed to measure and reduce their Financed Emissions to accelerate the transition to net zero emissions by 2050 at the latest¹⁴

12 <https://www.ft.com/content/1a7f573c-9a5a-4e41-a113-a96ce7fa80a8>

13 <https://www.ft.com/content/1a7f573c-9a5a-4e41-a113-a96ce7fa80a8>

14 <https://unfccc.int/news/new-financial-alliance-for-net-zero-emissions-launches>



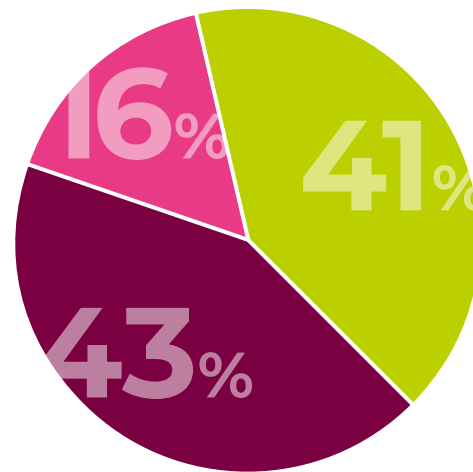
ALIGNING ADVERTISED EMISSIONS TO REDUCE UK'S TOTAL EMISSIONS

In April 2021, the UK enshrined in law the target to slash carbon emissions by 78% by 2035.¹⁵

This world leading target was in line with the recommendation from the independent Climate Change Committee (CCC) and its sixth Carbon Budget report.¹⁶

The CCC report details the changes required by the UK to meet the target and highlights the significant improvements made on the supply side (e.g. low-carbon power now provides over 50% of the UK's electricity supply, with no change required by UK citizens). The report is unequivocal that people will need to change their behaviour. It states "it will not be possible to get close to meeting a net zero target without engaging with people or by pursuing an approach that focuses only on supply-side changes".

The report clarifies the level of behaviour change required. **To achieve the UK's 78% reduction target, the majority will involve shifts in consumption:**



- Measures with a combination of low-carbon technologies and societal/behaviour changes
- Low-carbon technologies or fuels, not societal/behaviour changes
- Largely societal or behavioural changes

¹⁵ <https://www.gov.uk/government/news/uk-enshrines-new-target-in-law-to-slash-emissions-by-78-by-2035>

¹⁶ <https://www.theccc.org.uk/wp-content/uploads/2020/12/The-Sixth-Carbon-Budget-The-UKs-path-to-Net-Zero.pdf>

43%

will be achieved by a combination of **low-carbon technologies and corresponding shifts in behaviours**

(e.g. buying a new electric car)

+

16%

will be achieved by **behaviour change alone**

(e.g. switching from meat and dairy to plant-based diets and flying less)

The report is clear in the significance and speed that change needs to happen:

“We don’t reach Net Zero simply by wishing it. There must be a process and a sequence by which we reach the goal. Progress is more gradual in the early years as we make up for lost ground. Scaling up new policy development, ramping up new supply chains for low-carbon goods, addressing sectors that have progressed too slowly: transport, industry, buildings, agriculture. A critical moment arrives in the early 2030s, as sales of most high-carbon goods are phased out altogether... If the people of the UK are not engaged in this challenge – the UK will not deliver Net Zero by 2050. The 2020s must be the decisive decade of progress and action.”

CCC, sixth Carbon Budget Report

As the engineers of demand, the advertising industry will play a decisive role in determining the UK’s ability to meet the timeline to reduce emissions by 78% by 2035.

To meet the targets set, UK citizens need to change their habits and expectations, particularly with high-carbon sectors. Gas boilers are being phased out. Consumption of red meat and dairy, long-haul flights, petrol and diesel SUVs will also need to be heavily reduced or phased out altogether.

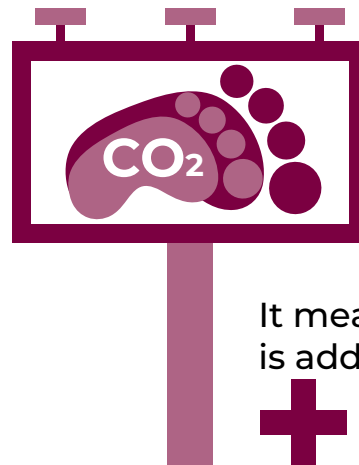
How proactive or reactive the advertising industry is will be a significant contributing factor in society’s acceptance of the changes that need to occur. If the industry chooses to be reactive it will continue to promote those categories right up to the moment they are phased out. This will maintain the cultural expectation that people can continue using these products and services, likely heightening societal resistance to any restriction. Instead, if the industry chooses to proactively remove or reduce promotion for those categories before they are legislated against, this will smooth the path for the necessary change. The gift and responsibility for that choice lies with the people who work within the ecosystem of advertising.

Advertised Emissions can provide the framework and conversation to help make these decisions.

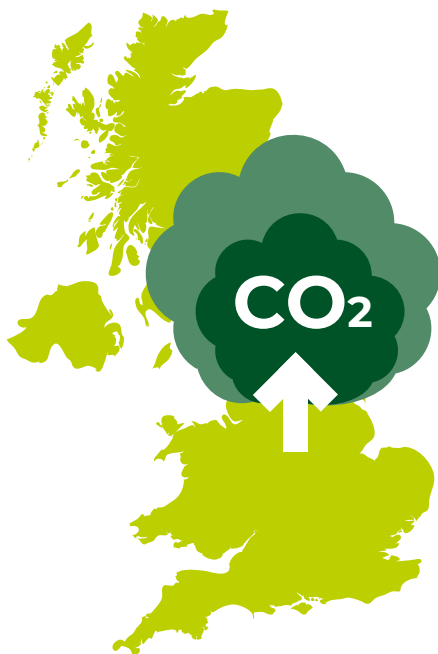
THE UK'S ADVERTISED EMISSIONS

HEADLINE FIGURES

In 2019, **Advertised Emissions from UK advertising** were more than **186 million tonnes of carbon dioxide equivalents**.



It means advertising is adding an **extra +28%** to the **annual carbon footprint of every single person in UK**



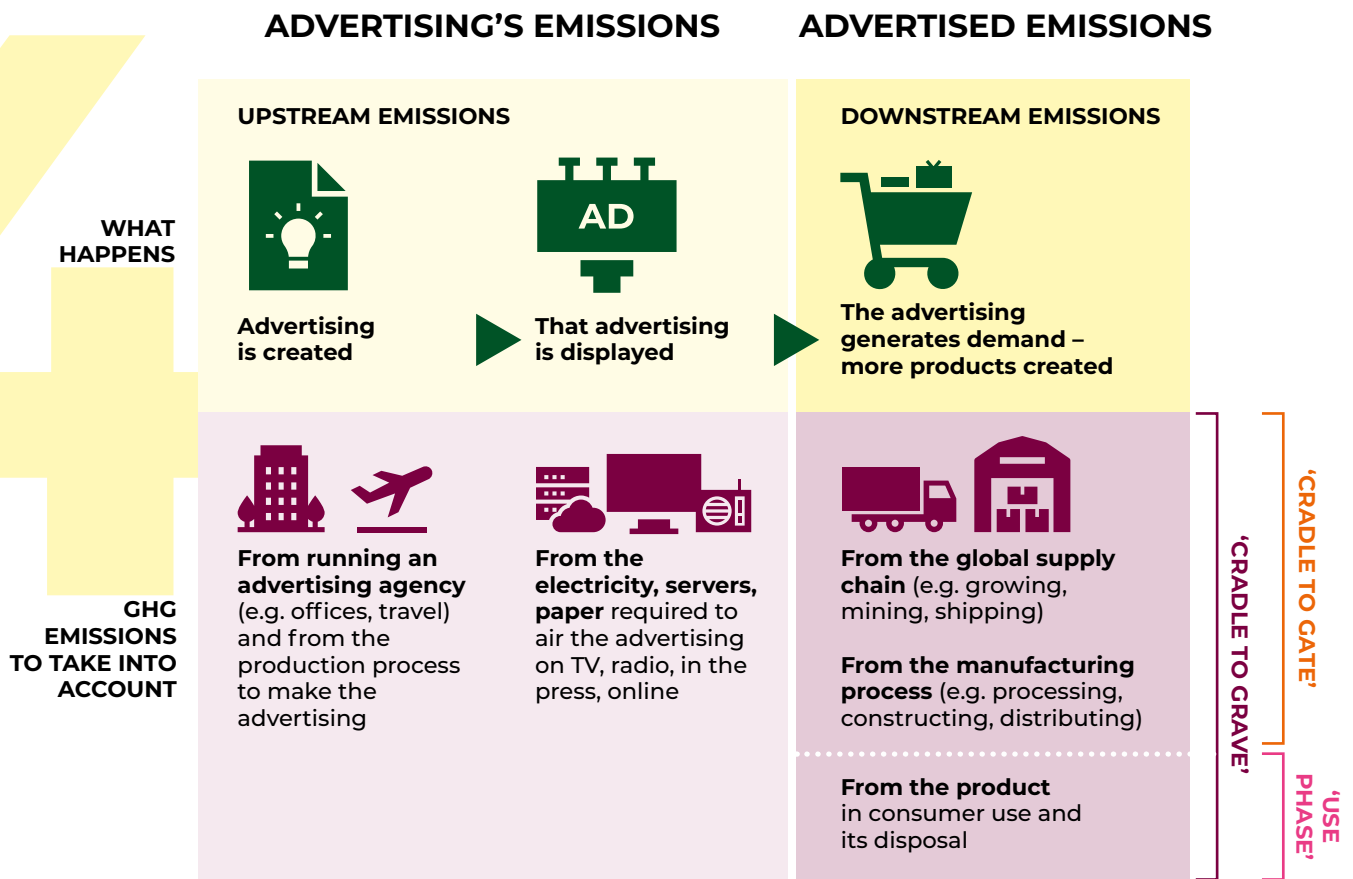
This is almost **half** the size of the **UK's total domestically produced emissions in 2019**



It is equivalent to
47 coal-fired
 power plants
 running for
one year



× **186** times bigger
 than the **operational**
 emissions of the
 UK advertising industry



APPROACH AND SCOPE

Building on the distinction between 'Advertising's emissions' and 'Advertised Emissions' (see Section 3: 'Why Now?'), the diagram above depicts and classifies all of the emissions that come from UK advertising. The upstream emissions – 'Advertising's Emissions' – on the left and middle of the diagram can be sized using existing online calculators available. AdGreen¹⁷ for calculating the emissions due to the production of the advertising and the IPA Media Carbon Calculator¹⁸ for calculating the emissions due to the media selection.

Our new research completes the picture by calculating the downstream emissions on the right-hand side of the chart, the industry's Advertised Emissions.

The calculation of Advertised Emissions is based on the carbon footprint of every additional product sold by advertising. **The common term is 'Cradle to Grave', which can be split into two: 'Cradle to Gate' is the footprint associated with making the product and the 'Use Phase', which is the footprint associated with using and disposing of the product.**

17 <https://weareadgreen.org/carbon-calculator>

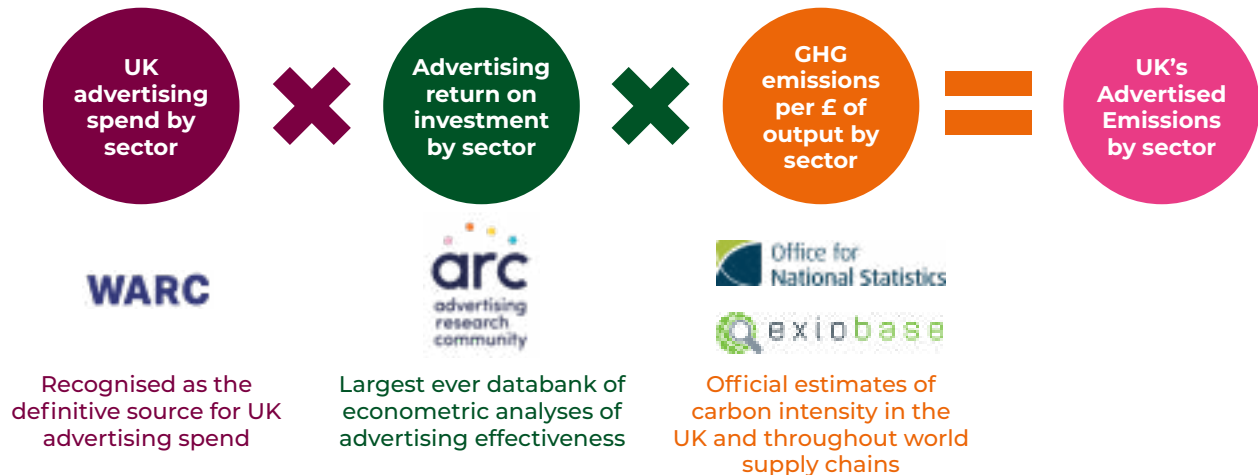
18 <https://ipamediaclimatecharter.co.uk/>

THE CALCULATION

We set out to establish the size of the Advertised Emissions for the UK advertising industry as a whole, for 2019. We chose 2019, as 2020 was a heavily distorted year in terms of ad spend, due to COVID-19.

For the calculation we used accepted methods summarised in the following diagram:

UK'S ADVERTISED EMISSIONS FOR 2019



Source: Magic Numbers

UK advertising spend by sector:

Data on advertising spend in 19 UK sectors that constitute all UK advertising spend.¹⁹

Advertising return on investment by sector:

Applied average revenue returned per £1 spent on advertising. This provides an estimate of the value created for businesses in each of the 19 sectors. The revenue per £1 spent figures are from the ARC database, which includes in-depth econometric evaluations of more than 1,000 years of advertising experience between 2016 and 2020, that's £5bn worth of UK advertising spend. Unlike other similar databases, ARC includes everyday unawarded campaigns, which means its estimates are a more accurate reflection of the mass of UK advertisers.

GHG emissions per £ of output by sector:

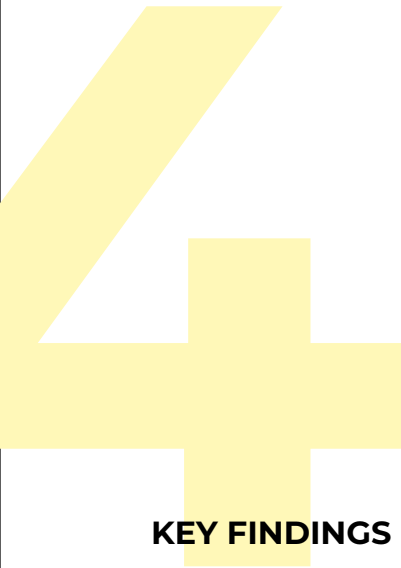
To assess the full extent of additional economic activity and emissions associated with this additional demand, the analysis used environmentally extended input-output modelling utilising a database that captures trade flows between industries around the world. This was combined with carbon intensities from the same database and from the UK government's statistics.²⁰

UK's Advertised Emissions by sector: The above gave us the UK's Advertised Emissions across the 19 sectors studied, which we combined to arrive at the total Advertised Emissions for the UK.

The full methodology is explained in Appendix 1

¹⁹ The 19 sectors are: Alcoholic drinks, Automotive, business & industrial, Clothing & accessories, Financial services, Food, Government & non-profit, Household & domestic, Leisure & entertainment, Media & publishing, Pharma & healthcare, Politics, Retail, Soft Drinks, Technology & electronics, Telecoms & utilities, Tobacco, Toiletries & cosmetics, and Transport & tourism. Data sources shown in the diagram and fully explained in Appendix 1

²⁰ Carbon intensity (or emission intensity) is the emission rate of CO₂e relative to the intensity of a specific activity, production process or product usage. For example, driving an EV for 100 miles powered by solar energy will have a lower carbon intensity than driving a petrol car over the same distance.



KEY FINDINGS

We estimate that, in 2019, Advertised Emissions from all UK advertising were more than 186 million tonnes of carbon dioxide equivalents.

The emissions figure is very large because advertising plays a significant positive role in the UK economy. We estimate that nearly £90bn worth of products were sold directly because of advertising in 2019. That's a full 4% of GDP, or c.£6.30 worth of economic activity per £1 spent on advertising. This figure is consistent with the Advertising Association's research which states that £1 spend on advertising generates £6 worth of economic activity.²¹

But this comes at a cost. **186m tonnes is almost half the size of the domestic (or territorial) emissions from the UK in 2019²², twice the size of emissions from Greece in the same year²³ and equivalent to 47 coal-fired power plants running for 1 year²⁴.**

Why such a large percentage of UK total emissions? Because the UK's published emissions – their 'territorial' emissions – do not include the emissions on goods imported to the UK. Yet, the majority of the goods people in the UK consume are made abroad.

21 <https://adassoc.org.uk/credos/advertising-pays-how-advertising-fuels-the-uk-economy/>

22 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/957887/2019_Final_greenhouse_gas_emissions_statistical_release.pdf. UK territorial emissions are 454.8m. Our estimate for Advertised Emissions is 186m.

23 https://stats.oecd.org/Index.aspx?DataSetCode=AIR_GHG

24 <https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>

25 As detailed in the Advertising Association Ad Net Zero report, 2020: <https://adassoc.org.uk/ad-net-zero/>

The UK's Advertised Emissions includes the emissions associated with these goods being made and sent to the UK, to be consumed.

Advertised Emissions dwarf other types of emissions from advertising. They are 186 times bigger than estimated total UK agency operational CO₂e emissions, from energy usage and business travel, which the Advertising Association's Ad Net Zero report estimates to be one million tonnes²⁵. Every person working in advertising in the UK is, on average, responsible for the carbon footprint of 34 of their fellow UK citizens²⁶.

Perhaps most importantly, **advertising is adding an extra 28% to the annual carbon footprint of every single person in UK²⁷.**

LIKELY AN UNDERESTIMATION OF ADVERTISED EMISSIONS

As described above, the standard method of calculating the carbon footprint of a product is to include the emissions from across the entire value chain. **From 'Cradle to Grave'**.

186m tonnes is an under-estimate of total Advertised Emissions because we have only obtained 'Cradle to Grave' emissions data for one of the 19 advertising categories we have studied.

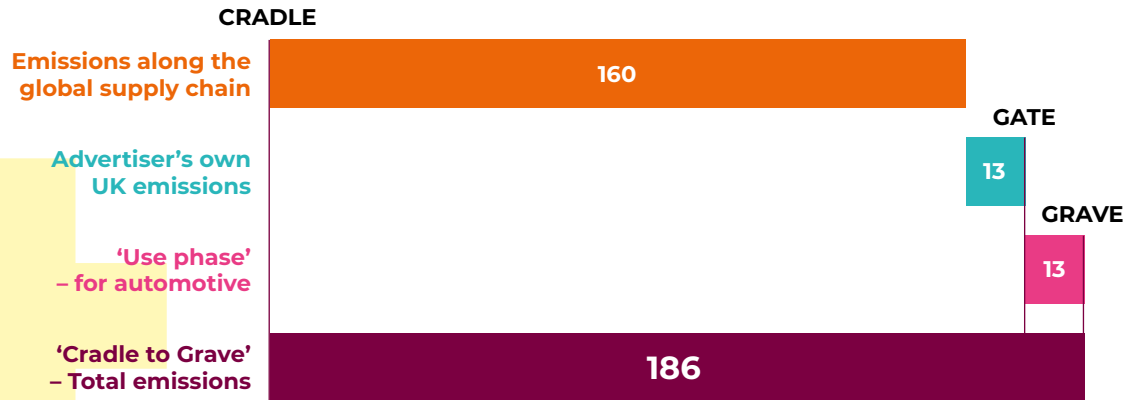
For Automotive. For the other 18, we have a partial view – the 'Cradle to Gate' emissions – but not the remaining 'Use Phase' emissions.

This is because Automotive is a rare sector where data availability is sufficient for estimating category level 'Use Phase' emissions. Clearly, other categories contribute significant emissions in their Use Phase. For example, all the plastic waste from food packaging and drinks bottles that are incinerated instead of recycled have a significant carbon footprint. As transparency increases and more Use Phase data becomes available across the remaining 18 categories, this will be included in the total Advertised Emissions figure.

²⁶ 186m tonnes divided by the total number of people working in advertising and media according to the IPA (426,000), divided by the average carbon footprint, per person in the UK

²⁷ 186m tonnes divided by 66.84m people in the UK (in 2019) with an average carbon footprint of 12.7 tonnes = 2.78 tonnes per person. Then $[(12.7-9.92)/9.92] * 100 = 28\%$. Average carbon footprint source: <https://www.pawprint.eco/eco-blog/average-carbon-footprint-uk#:~:text=3%20min%20Read,The%20average%20carbon%20footprint%20per%20person%20in%20the%20UK,year%2C%20is%2012.7%20tonnes%20CO2e>

2019 ADVERTISED EMISSIONS BY SOURCE (CO₂E, MILLION TONNES)



Source: Magic Numbers calculations based on data from WARC, ARC, ONS, EXIOBASE, Ricardo, Greenpeace, WWF, and DVLA. See methods section for more details

THE MAJORITY COMES FROM THE GLOBAL SUPPLY CHAIN

The chart above shows how the Advertised Emissions estimate for all additional products sold due to advertising breaks down, from Cradle to Grave. The Cradle to Gate section is made up of emissions from the global supply chain (orange), emissions from the advertiser's own production process (turquoise). The 'Use Phase' emissions, from Automotive alone, are in pink.

What's striking from the chart is that only a small proportion (7%) of all advertised emissions take place in the advertiser's own business (turquoise), with the vast majority of emissions being incurred along the supply chain, often outside the UK.

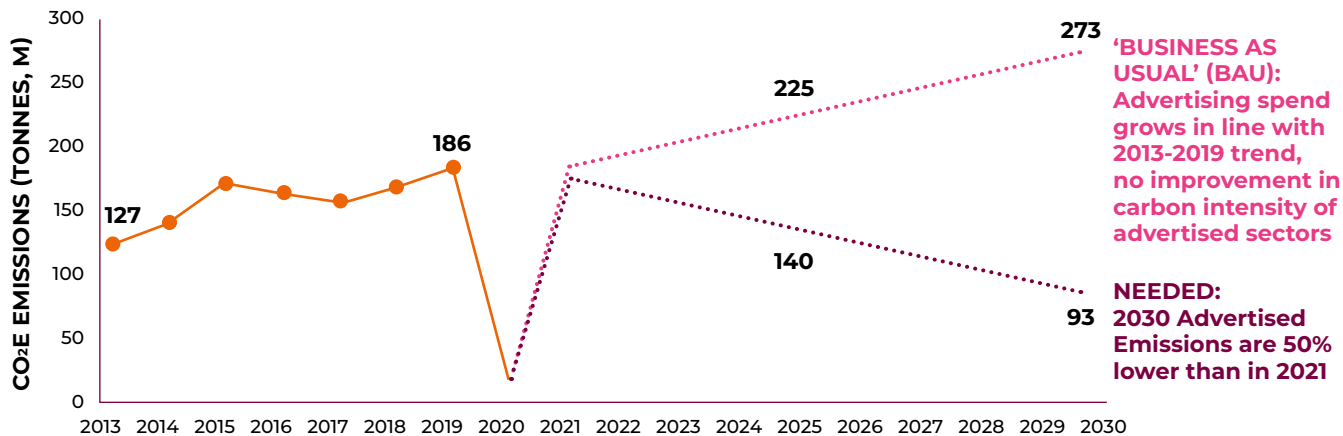
Emissions incurred throughout the global supply chain have to be included. **Advertising exists to help a client business sell more than it otherwise would have. That means it prompts client businesses and their suppliers to make more things than they otherwise would have.** The additional emissions associated with growing, mining, drilling, processing, manufacturing and shipping the extra products that advertising helps sell. **By creating demand for these products, the advertising industry shares responsibility for these emissions.**

It is true that the advertiser and its supply chain contractors may well be reporting the emissions associated with these extra sales. However, under the agreed terms of the GHG Protocol, businesses routinely count the emissions 'overlap' with emissions of other organisations. This is seen as critical to enable all actors to push towards net zero together. It is also true that sometimes advertising works to increase the advertiser's market share rather than creating new demand, so that some of the additional sales may be offset by fewer things being sold by competitors. Again, this doesn't let the advertisers off the hook. Pushing towards net zero requires everyone to take responsibility for every carbon emission that they can control or influence either directly or indirectly, regardless of what happens elsewhere.

If UK businesses are to do this successfully, it is important that national government agencies publish data that facilitates people and businesses to easily understand emissions along the global supply chain. So far, the Office for National Statistics in the UK only publishes data on UK emissions. This is likely responsible for a widespread dramatic underestimation of the climate impact of economic activity in the UK. The issue of underestimation of reporting emissions was a key finding within the Financed Emissions report.

For detailed information on the methodology, please see Appendix 1

SCENARIOS TO 2030 FOR ADVERTISED EMISSIONS



Source: Magic Numbers calculations based on data from WARC, ARC, ONS, EXIOBASE, Ricardo, Greenpeace, WWF, and DVLA

WITHOUT DELIBERATE ACTION, ADVERTISED EMISSIONS WILL CONTINUE TO INCREASE

The reason for identifying the UK's 2019 Advertised Emissions is to set a benchmark from where to urgently reduce them year on year, in line with global Science Based Targets.

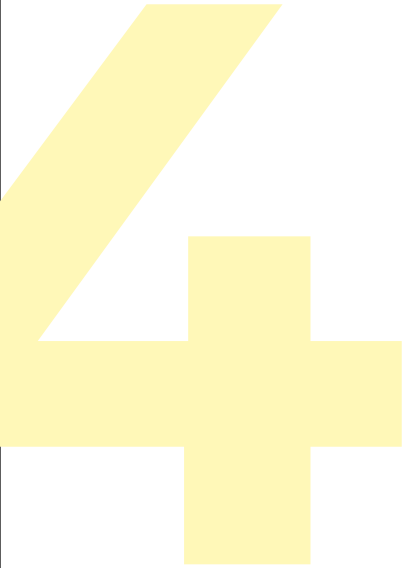
But the data is not moving in the right direction. Our calculations show that between 2013 and 2019 Advertised Emissions increased from 127m to 186m tonnes.

We forecast that if previous trends in advertising spend re-establish after COVID, and there is no improvement in the overall carbon intensity of what is advertised, emissions will be more than 270m tonnes by 2030. The latest data on advertising expenditure points to this as a likely outcome.²⁸

It is drastically different to the necessary trajectory, as the chart above shows. In it, the turquoise line is the business-as-usual path described above. The green line is what has to happen to align with Science Based Targets; along it advertised emissions fall by 50% between now and 2030.

Reducing advertised emissions by 50% by 2030 will be difficult, but it is not impossible.

28 <https://adassoc.org.uk/advertising-spend/>



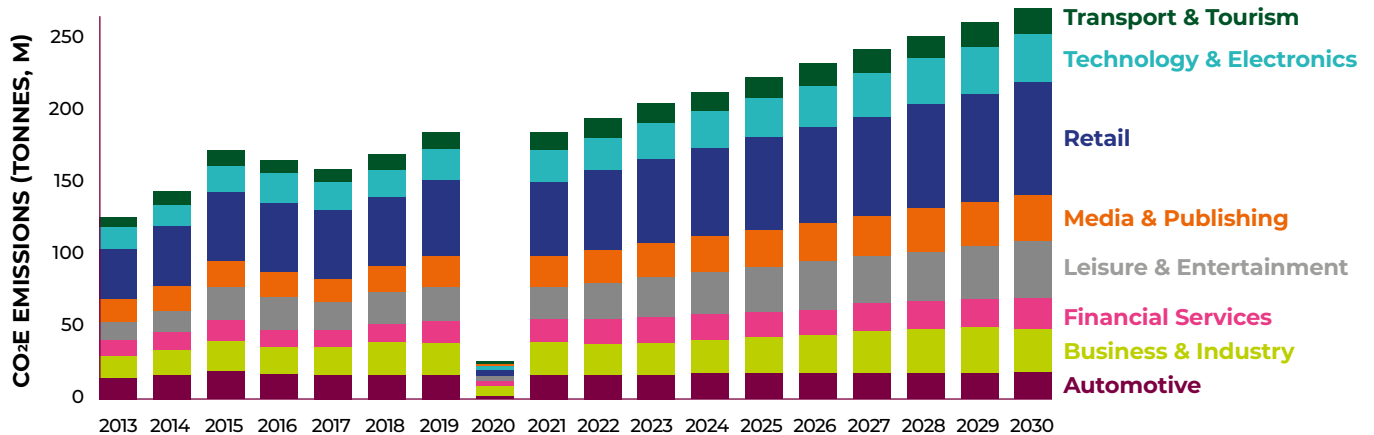
HOW TO REDUCE ADVERTISED EMISSION BY 50% BY 2030?

We calculate that it is possible for the advertising industry to reach 93m tonnes of CO₂e by 2030 if:

- **The overall carbon intensity of the existing mix of products and services sold, through the advertisers supply chains, reduces by 50%**
- **Advertising spend targeting that mix, with its reduced carbon intensity is capped at 2019 levels**
- **Any new spending targets is for zero carbon products and services**

Each of these options are challenging to achieve. The benefit of the data-based approach of Advertised Emissions is that it provides a clear indication of the scale of the shifts required. It gives the people that control the presence and content of advertising in society the information they need to have the necessary conversations that lead to appropriate action.

'BUSINESS AS USUAL' (BAU) ADVERTISED EMISSIONS TO 2030 BY SECTOR



Source: Magic Numbers calculations based on data from WARC, ARC, ONS, EXIOBASE, Ricardo, Greenpeace, WWF, and DVLA. See methods section for more details.

The chart above shows the business as usual forecast with emissions split by advertising category.

The most **significant opportunities** to reduce emissions are in the categories that spend a lot on advertising (as indicated by the coloured bars), enjoy a strong return on investment, and have carbon intensive production and supply chains.

- Retail (from supermarkets to high street chains)
- Technology and electronics
- Transport and tourism
- Leisure and entertainment

The task now is to divert advertising spend in these sectors towards cleaner businesses or – if zero carbon alternatives do not exist – into other sectors with low emissions. We provide a strategic framework to facilitate this discussion in *Section 6: How the industry reduce its Advertised Emissions*.

Atmospheric emissions must be reduced by 50% by 2030 and achieve net zero by 2050. To reach this longer-term target, the Science Based Targets institute expects most companies to make emissions reductions of at least 90 – 95% to reach net zero, with the small remainder of residual emissions to be met by more carbon removals.²⁹ **A company cannot get there by offsetting or carbon removal. The concept of Advertised Emissions is crucial to enable the advertising ecosystem to do its bit in helping – not hindering – the transition to net zero.**

²⁹ <https://sciencebasedtargets.org/blog/what-is-good-net-zero>

HOW DOES AN ORGANISATION MEASURE ITS ADVERTISED EMISSIONS?

In order for the total Advertised Emissions to decrease in line with Science Based Targets, organisations in the ecosystem need to measure their own Advertising Emissions, then seek to reduce them by 50% by 2030.

In our next phase of work around Advertised Emissions, Purpose Disruptors will be seeking to work with industry leaders on the development of an Advertising Emissions measurement tool that can be adopted by the industry.

Please contact us if you are interested in developing this.

In the interim, we recommend the following **3-step approach**:



More detail on how to measure the emissions from advertising work is included in the 'Ecoeffectiveness' module of #ChangeTheBrief³⁰.

30 <https://www.changethebrief.org/>

3-STEP APPROACH

WHAT	WHEN	HOW	RESULT
STEP 1. ESTABLISH THE BASE-LINE	Year One	<p>Multiply the following data:</p> <ol style="list-style-type: none"> 1. Yearly ad spend for each client and/or brand 2. Uplift in sales due to the advertising during that year (from econometric modelling or category norms) for each client and/or brand 3. The carbon intensity of the brand(s) being sold during that year (sourced from the advertiser or publicly available data) <p>This information is required for each client and/or brand and can be provided by advertisers, agencies or media owners.</p>	Carbon emissions that result from the uplift in sales generated by advertising
STEP 2. SET REDUCTION TARGET	Year One	Set a target of reducing Advertised Emissions by 50% by 2030 (in line with the science)	Clear reduction pathway
STEP 3. ANNUAL MEASUREMENT AND REPORTING	Years Two to 2030	Establish a reporting mechanism to gather, calculate and publicly share the Advertised Emissions on an annual basis illustrating the reduction from the baseline	Clear understanding and visualisation of how the organisation is, in relation to the reduction pathway

HOW THE INDUSTRY CAN REDUCE ITS ADVERTISED EMISSIONS

It is clear that significant changes need to be made to decrease Advertised Emissions. Clients, agencies, media owners, regulators and the government are responsible for the ecosystem that controls the Advertised Emissions so it is their responsibility to reduce them.

The task, in short, is to promote fewer high-carbon brands and promote more low-carbon brands.

This is an analogue of the finance sector. Financed Emissions inspires redirection of the unique contribution that finance can make – the allocation of money. Financial Institutions are reallocating money from high-carbon industries to lower-carbon alternatives. **Advertised Emissions can similarly inspire the reallocation of spend and resources within the advertising ecosystem to shift demand from high-carbon to low-carbon consumer choices.**

DECIDE WHAT SHOULD BE PROMOTED

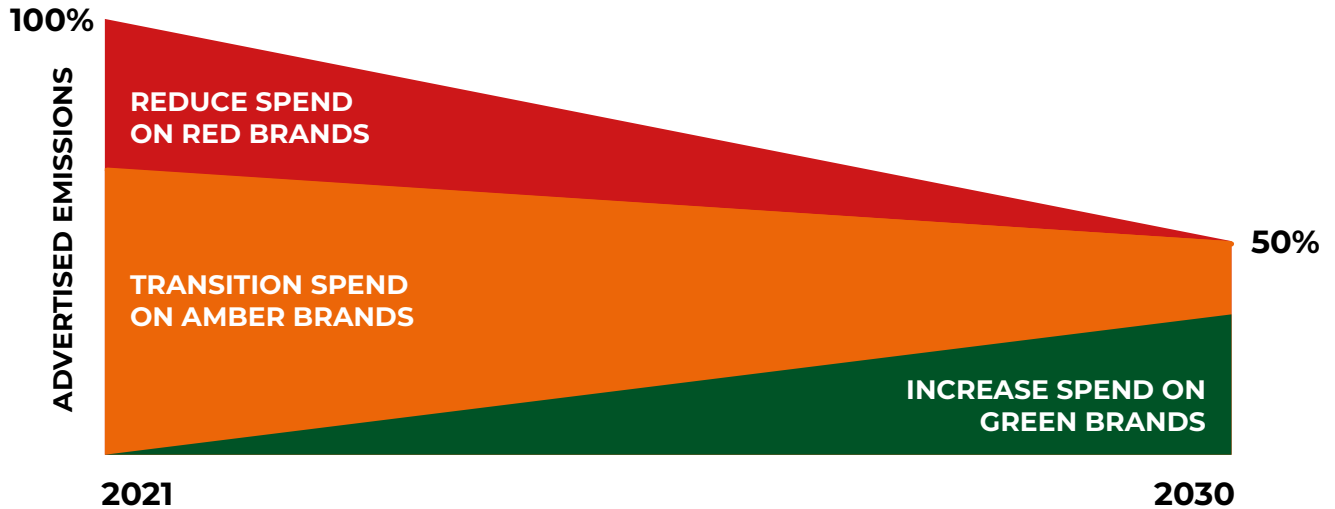
Not all categories and brands are equal when it comes to their climate impact.

Within the finance sector, ideas like ‘Divest/Invest’ popularised the idea that finance should be removed (divested) from supporting high-carbon industries and invested in low-carbon alternatives. Taking this idea and applying it to Advertised Emissions, we can categorise the market into three typologies (see graph on next page).

The ecosystem that is responsible for Advertised Emissions should:

- 1. REDUCE SPEND** on promoting **red brands**
- 2. TRANSITION SPEND** on **amber brands** towards accelerating the adoption of lower-carbon attitudes and behaviours
- 3. INCREASE SPEND** to grow **green brands**

GOAL: REDUCE ADVERTISED EMISSIONS BY 50% BY 2030



RED BRANDS

High carbon brands and industries. There is little opportunity for advertising to re-engineer demand as:

- They are not sufficiently investing in low carbon alternatives (e.g. fossil fuel companies)
- Technology to achieve low carbon alternatives will not be ready in time (e.g. airlines)
- Consumption of these products cannot be achieved without high levels of carbon being emitted in the system (e.g. long-haul holiday destinations)

AMBER BRANDS

Established brands and industries that are ripe to drive the transition to lower-carbon consumption through re-engineering demand:

- Putting disproportionate weight (messaging and media) behind low-carbon alternatives
- Accelerating acceptance and normalisation of new business models (e.g. repair not replace)
- Capitalising on existing brand trust to make lower carbon choices more acceptable (e.g. car companies promoting EVs or burger chains promoting plant-based alternatives)

GREEN BRANDS

New and emerging brands low or zero carbon and industries whose business model is geared to serving a 1.5°C world:

- Sustainable innovators within existing sectors (e.g. fashion) whose supply chain or manufacturing approach offers a significantly lower environmental impact
- Innovative and challenger business models whose offering encourages people to switch from high to low-carbon behaviours (circular economy/second hand, sharing economy, car sharing, e-bikes, virtual meetings)
- Digital businesses for whom increased demand doesn't create significant incremental impact within the existing system (software companies, service-based apps, web design companies, gaming software)
- Leading organisations within the UN's Race To Zero, who are similarly committed to near-term, significant and transparent emissions reductions in line with climate science imperatives



To achieve this, different players across the system need to **collaborate** and **take different roles**. For example:



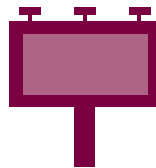
BRANDS

Only promote low-carbon products



AGENCIES

Make choices about what to work on



MEDIA OWNERS

Only run advertising for certain kinds of business



REGULATORS

Decide what should and should not be promoted



GOVERNMENT

Restrict advertising in certain categories

31 <https://adage.com/creativity/work/ikea-will-buy-back-your-old-furniture-black-friday/2287521>

32 <https://www.marketingsociety.com/the-library/2010-ariel-marketing-sustainable-consumption-case-study>

33 https://www.warc.com/content/paywall/article/APG/Quorn_Rethinking_planning_for_the_coming_storm_How_planning_can_help_the_planet_one_brand_at_a_time/en-CB/138753

34 <https://ghgprotocol.org/>

EXAMPLES OF HOW ADVERTISING IS ALREADY REDUCING ITS ADVERTISED EMISSIONS

Members of the ecosystem are already acting:

RED BRANDS

- **City of Amsterdam** bans fossil fuel advertising (Dec 2020), **City of the Hague** bans fossil fuel advertising from bus shelters (Oct 2021)
- **Swedish newspaper Dagens ETC** ban all fossil fuel advertising i.e. Big Oil, cars, flights etc. (Sep 2019) and British newspaper **The Guardian** bans fossil fuel advertising (Jan 2020)

AMBER BRANDS

- **IKEA** has calculated that 20% of its carbon footprint is contained within 'product use at home'. To accelerate this reduction, it has advertised its innovate 'buy back and resell' service³¹
- Cold-water washing campaigns such as **P&G's Ariel** 'Turn to 30°C were calculated to have helped cut 58,000 tonnes of CO₂e by educating consumers to save energy³²

GREEN BRANDS

- Alternative protein brand **Quorn** worked with the Carbon Trust to calculate the carbon saved through encouraging a switch away from meat. 3.8 million kg of CO₂ were saved in 2 months after the launch of the brand's latest advertising campaign³³
- **Sky** Zero Footprint Fund awarded £2m in free airtime to organic femcare brand Here We Flo, energy provider Ovo, food waste app Olio and the world's first carbon neutral baby care brand, Pura.

We provide examples of existing initiatives in *Appendix 3*.

We provide suggestions on how to use advertising to encourage new systems and behaviours and maximising advertising's Return on CO₂e in *Appendix 2*.

ADVERTISED EMISSIONS AND SCOPE 3 EMISSIONS

Advertising agencies can embed the goal of reducing their Advertised Emissions by including them within their Scope 3 emissions. The GHG Protocol, the world's most widely used greenhouse gas accounting standards³⁴, states that "companies should prioritize activities in the value chain where the reporting company has the potential to influence GHG emissions", within their Scope 3 emissions.

Every agency has a choice as to the work it produces, for whom. Advertised Emissions should therefore be included within the measurement of an agency's Scope 3 emissions.

See Appendix 4 for more detail.

IMPLICATIONS

As the engineers of demand, the ecosystem responsible for Advertised Emissions needs to work in radical collaboration to reduce emissions by half by 2030 and achieve net zero by 2050, if not sooner.

KEY QUESTIONS INCLUDE:

What is the forum to **facilitate** the conversation to discuss this?

How do we **create a culture** of openness, honesty and transparency?

How do we **decide** who should take responsibility for what?

How do we **support** each other in taking the necessary actions?

How do we hold each other **accountable** in a fair and frank way?

How do we find a profitable way to deploy our talents to **build** a sustainable society, not just drive consumer demand?

A POSITIVE FUTURE FOR THE INDUSTRY

A reduction in environmentally harmful advertising does not necessarily lead to a reduction in income for the advertising industry. It just requires a change

in approach. Just as the digital revolution turned the advertising industry upside down but ultimately drove significant growth in revenue for companies who adapted quickest, the sustainable revolution will create significant new opportunities for the industry – should it adapt quickly enough.

Trillions of dollars will be spent on building new systems, services and products that allow humans to enjoy their lifestyles while decarbonising the economy.

Advertising can capture a significant proportion of this spend, if it can reinvent itself from the demand-creator of the industrial age to the participation-driver of the regenerative age.

As the industry and regulators address the need to reduce the total amount of advertising, particularly for high carbon sectors, progressive advertising companies will switch away from high-volume, low-quality advertising work. Instead they will use their core skills of insight, targeting and creativity to help popularise sustainable, profitable business models that move beyond consumption.

POTENTIAL OUTCOMES

Here we list potential outcomes of adopting Advertised Emissions for each of the significant actors within the advertising ecosystem. However, it will be through deep collaboration, transparency and honesty between the groups that will result in the most significant shifts. **By coming together they can make greater strides in lower Advertised Emissions than they can do alone.**



A. ADVERTISERS

Advertised Emissions gives businesses investing in advertising the currency to discuss, measure and reduce the emissions associated with consumer use:

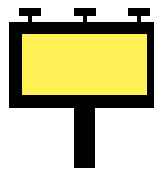
- Enables acceleration in the introduction and adoption of new, low-carbon products and services (see Encourage Positive Behaviours, Better Product Usage and Carbon-free value, see *Appendix 4*)
- Facilitates progressive brands, who are already engaged in reducing emissions associated with consumer use, to measure and reduce those emissions, together with their agency partners
- Enables brands, with their agency partners committed to Advertised Emissions, the incentive to invent and normalise radical new business ideas and behaviours
- Helps high carbon advertisers to avoid being 'boycotted' and instead demonstrate using data how they intend to use advertising to accelerate their net zero transformation.



B. AGENCIES

Advertised Emissions enable agencies to take full responsibility for their climate impact by measuring and reducing the emissions associated with the advertising they produce:

- Keep up with clients who are already taking responsibility for the consequence of products sold in consumer use and use the insight to spark innovation:
- Heightened levels of creativity to drive the adoption of low-carbon products and services
- Additional revenue through helping clients develop and take to market new business models that require radical shifts in consumer behaviour (e.g a client moving to a circular business model)
- Make informed decisions about the kind of advertising projects they want to take on
- Combat the growing challenge of greenwashing and focus on both materially reducing the carbon footprint and driving profitability
- Retain and attract talent as a purposeful industry building a sustainable society, not just driving demand
- Inspire innovative business models for the agency.
A key question: How do we find a profitable way to build a sustainable society, not just consumer demand?



C. MEDIA OWNERS

The adoption of Advertised Emissions enable media owners to be more responsible and choiceful about the carbon implications of the brands and messaging they accept on their platforms:

- A media owner can create a 'carbon budget' of the advertising it chooses to take. So, for a magazine, broadcaster, newspaper or digital platform, it could ensure that total advertising displayed over a specified time period does not exceed a stated level of Advertised Emissions
- The data empowers them to have constructive conversations with high-carbon advertisers without risking jeopardising a significant proportion of their income
- Organisations inviting sponsorship (cultural institutions, football teams) can use the data to navigate difficult decisions on whether to allow high-carbon brands as sponsors
- Broadcasters can deliberately promote or support advertising with the lowest levels of advertised emissions – building on activity such as ITV's Sustainability Pledge Ad Break and Sky's Zero Footprint Fund.



D. REGULATORS AND GOVERNMENT

The recent UK Government announcements and developments in regulation make very clear that, by adopting Advertised Emissions, the advertising ecosystem will be preparing well for the future. Doing so will put advertising businesses in good stead to thrive in the coming environment, where credible corporate transition plans will be the baseline expectation and policymakers and regulators look to support consumers to navigate towards more sustainable purchasing decisions and stamp out greenwashing.

The UK Government has recognised the need for public engagement to support consumers to make low-carbon choices.

- In its recently announced Net Zero Strategy, the government aims to put consumers at the heart of the net zero transition and to make it significantly easier for consumers to choose green options.³⁵
- The UK CCC feeds into Government decision-making. In response to the Net Zero Strategy, the CCC calls for more emphasis on reducing demand for high carbon activities and more action on public engagement.³⁶
- In the UK Climate Assembly, which informs the government's plans, 74% of citizens backed advertising bans and restrictions on high emissions products or sectors.³⁷

The UK government expects the publication of credible net zero transition plans to become the norm across the economy as they are considered essential for investors' ability to hold company boards and management to account.

- The Task Force on Climate-related Financial Disclosures (TCFD) recommends disclosure of transition plans, including specific activities to reduce GHG emissions across companies' value chains – not just direct emissions.³⁸
- Complementing the similar EU's Corporate Sustainability Reporting Directive proposal³⁹, forthcoming UK legal requirements (the Sustainability Disclosure Requirements) will mandate business transition plans.
- In the future, the Government will look to incorporate further emerging standards for transition plans into UK law and regulation.⁴⁰

BEYOND

BEYOND THE UK

Regulators are turning their attention to the role they can play in supporting the UK to meet net zero targets set by the Government.

- The Competition and Markets Authority and Advertising Standards Authority have programmes of work underway which are informed and underpinned by the consensus that consumer behaviour change will play an increasingly important role. It has issued new Guidance on misleading green claims and plans to enforce it from 2022.
- Advertising Standards Authority has announced a series of issues-led enquiries into misleading and socially irresponsible green claims that will focus on consumer behaviour change and carbon reduction. (i.e transport, energy and heating, waste, meat, dairy and food sustainability claims).

Inspired by the UK hosting Cop26 in Glasgow, this report has been written by authors based in the UK with the calculation for the UK's Advertised Emissions. But advertising is a global industry. The UK is only the world's 4th highest spending advertising market⁴¹ and 15th largest by its CO₂ emissions⁴².

We urge other countries to adopt the methodology we have outlined and do their own calculation. Together we can pool our knowledge and learning to help shift the global ad industry towards helping shape a more sustainable future.

35 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1028157/net-zero-strategy.pdf

36 <https://www.theccc.org.uk/2021/10/26/governments-net-zero-strategy-is-a-major-step-forward-ccc-says/>

37 <https://www.climateassembly.uk/report/read/final-report.pdf>

38 https://assets.bbhub.io/company/sites/60/2021/07/2021-TCFD-Implementing_Guidance.pdf

39 https://ec.europa.eu/info/business-economy-euro/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting_en

40 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1026224/CCS0821102722-006_Green_Finance_Paper_2021_v5_Bookmarked_48PP.pdf

41 <https://www.statista.com/statistics/273736/advertising-expenditure-in-the-worlds-largest-ad-markets/>

42 <https://worldpopulationreview.com/country-rankings/carbon-footprint-by-country>

CLOSING THOUGHT: BEYOND ADVERTISED EMISSIONS TO RE-ENGINEERING CULTURAL NORMS?

Advertised Emissions can be the currency to talk about the carbon consequence of advertising in society. This is a vitally important step. However, will this be enough? As you discuss and debate the report and its implications, we ask you to do so, alongside the following facts and questions...

Science Based Targets institute expects most companies to make emissions reductions of at least 90 – 95% to reach net zero.⁴³

UNEP has stated that the top 10% of consumers (700 million people), who emit nearly half of the world's carbon pollution, need to cut their carbon footprints by 90%.⁴⁴ Anyone who earns over £29,000, the average household income in the UK⁴⁵, and the target for the majority of briefs, is in the global top 10%.⁴⁶

The recent Hot or Cool research⁴⁷ states that in the UK, annual lifestyle carbon footprint per capita needs to reduce by 70% by 2030 and 92% by 2050.

In 2018, the IPCC stated that to limit global warming to 1.5°C would require “rapid, far-reaching and unprecedented changes in all aspects of society”.⁴⁸

43 <https://sciencebasedtargets.org/blog/what-is-good-net-zero>

44 <https://climateoutreach.org/lifestyle-change-system-change-two-sides-same-coin/>

45 <https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyear2020>

46 <https://howrichami.givingwhatwecan.org/how-rich-am-i>

47 <https://www.rapidtransition.org/events/hot-or-cool-report-launch-1-5-degree-lifestyles-towards-a-fair-consumption-space-for-all/>

48 <https://www.ipcc.ch/2018/10/08/summary-for-policymakers-of-ipcc-special-report-on-global-warming-of-1-5c-approved-by-governments/>

It is hard to envisage the dramatic shift in cultural norms that will be required to meet these targets. It will take immense creativity and resolve to get there. A new landscape of meaning will need to be created.

What would the 'rapid, far-reaching and unprecedented' change that would be needed within advertising, for **the industry** to lead in creating this different society?

For it to be truly in service of a 1.5°C world?

What would the industry look like? How big would it be? What would people be using their unique talents for?

These are the bigger, necessary questions that need to be asked and discussed as the industry considers its positive contribution to our climate emergency.

RECOMMENDATIONS

We hope that this report is widely shared and discussed within the advertising industry.

That it emboldens those who already know that the industry needs to take full responsibility for its climate impact.

That it speaks a truth to those who are currently undecided.

That it provides a robust logic and sense of urgency for those who currently resist.

This report has avoided bold rhetoric and cavalier recommendations, in favour of robust and credible suggestions on how to both tackle advertising's negative impact on the climate crisis and build a positive and profitable future role for advertising in society.

The invitation is to cross the threshold of responsibility and become the industry that many people in it want it to become.

It will enable people to utilise their skills and experience, in creativity and commerciality, to help reshape society towards a more sustainable future.

To be on the right side of history.
Will that happen? The choice is yours to make.

OUR RECOMMENDATIONS:

✓ The **wide-spread recognition of Advertised Emissions** across the advertising ecosystem.

✓ Inside-industry bodies (such as the Advertising Association and ISBA), with the support of the regulator and involvement of stakeholder groups, to **champion and encourage the embedding of Advertised Emissions** across the ecosystem.

✓ The **integration of Advertised Emissions into advertiser and agency Scope 3 emissions reporting** and therefore part of credible, science-aligned net zero plans consistent with the UK's targets.

✓ An **independent scientific expert body (such as the Science Based Target Initiative) to produce common rules for accounting for Advertised Emissions** and for setting science-aligned goals and targets for their reduction, to ensure credibility.

✓ Willing members of the ecosystem to **co-create a tool that all relevant organisations in the ecosystem can use to measure and reduce their Advertised Emissions.** Purpose Disruptors are happy and willing to host and lead this process.

FAQ

Q: What about double counting? If my client is already counting the carbon emissions associated with the sales for the brands we promote, then why do I have to as well, as their agency?

A: Within the carbon accounting world, this is standard practice. For example, when you report the carbon emissions of the electricity supply to your office and seek to reduce them, those emissions are also being counted by the energy companies you buy from, and they are also reducing them as part of their net zero plans. You are both trying to reduce the same emissions. By everyone attempting to reduce their emissions, even when there is overlap, it enables all of us to push towards reaching, and achieving, net zero faster. And equally, when a client manages to achieve emissions reductions in their supply chain your agency will be able to account for those reductions in your Advertised Emissions too.

Q: My advertising is designed to get people to choose my brand who would otherwise have chosen a competitor's. So if advertising is driving an uplift for my brand, won't it be counterbalanced out by a decrease for a competitor?

A: Sometimes yes, sometimes no, it depends on your brand's competitive environment. In practice, and without in depth and up to date research to hand, you are unlikely to know whether your Advertised Emissions will be offset elsewhere, and you can't assume the best. Pushing towards net zero requires everyone to take responsibility for every carbon emission that they can control or influence either directly or indirectly, regardless of what happens elsewhere.

Q: I am already signed up to Ad Net Zero and committed to measuring and reducing the carbon footprint of my advertising's production through AdGreen. I'm already managing my carbon footprint. Why do I need to think about this too?

A: Ad Net Zero, AdGreen and the Media Carbon Calculator and vitally important first steps in the advertising industry taking responsibility for measuring and reducing its carbon footprint. But none of these take into consideration the consequence of the advertising put into the world – the reason the advertising industry exists in the economy. There is a huge carbon footprint associated with the uplift in sales that advertising creates for which the industry needs to take responsibility. By choosing to measure and reduce our Advertised Emissions it allows us to do this, and through this, enables us to use our creativity to shift society towards a more sustainable future.

Q: We are already taking brand purpose seriously, isn't that enough?

A: Brand purpose can enable brands to make positive strides in helping address a variety of social and environmental issues. But doing good of this kind doesn't reduce the need to do less harm elsewhere. Reducing the amount of carbon emitted is not an optional cause but a necessary responsibility of every organisation. The majority of promotional 'purpose' advertising does not consider the carbon footprint that results from the increase in sales generated - something that can be directly addressed through the choices the advertising industry makes. Advertised Emissions does not replace brand purpose, but can complement it.

Q: I won't be able to access the data on my Advertised Emissions, so how can I calculate my full footprint?

A: Purpose Disruptors are committed to developing the concept of Advertised Emissions. In writing this report, with the econometrics agency Magic Numbers, we used category averages alongside a data bank of case studies to calculate the Advertised Emissions for the UK. We will be developing a tool for agencies and agencies to calculate their own Advertised Emissions. For those who are able, they can insert their own data, for those where that is not available, we will be using the same, or refined, publicly available data. This will enable anyone to be able to calculate their Advertised Emissions.

Q: Why are total UK Advertised Emissions such a large percentage of the UK's total emissions? Is this number credible?

A: The reason why this is so large is because Advertised Emissions encompass consumption emissions and many of the things we consume are made outside of the UK and therefore are not included within the UK's territorial emissions. So Advertising Emissions draws from a bigger pool (global emissions) than only UK emissions.

Q: If my advertising is just promoting my brand, not selling a product, does it have emissions associated with it? What if it is promoting a more sustainable product or message?

A: The econometrics used in the research captures average uplift in revenue from the sales of goods driven by advertising by sector. It is therefore not the message that is being measured, but the real-world outcome of running the advertising. Brand advertising and sponsorship will drive additional demand for products and the carbon emissions they produce. And advertising a 'hero' low-carbon product is likely to also drive sales of high-carbon products from the same brand. The total uplift driven by the advertising is what is being measured.

Q: If my advertising sells low-carbon products instead of high-carbon products then will my Advertised Emissions go down?

A: Yes, but over time. All goods and services sold, even low-carbon ones, have a carbon footprint through their creation, distribution, use and disposal. The total uplift in emissions created by the sale of these is included in Advertised Emissions. So every incremental product sold (even if it's low carbon) will have a net positive impact and cause Advertised Emissions to go up. However the method can be used to measure progress over time. So if a brand or sector starts selling low-carbon products instead of high carbon products, this will be reflected over time in a reduction in absolute Advertised Emissions. To align with Science Based Targets this reduction needs to be at least 50% by 2030.

APPENDIX 1

RESEARCH METHODS

1. THE EFFECT OF ADVERTISING ON ECONOMIC ACTIVITY IN THE UK

Expenditure on advertising in the UK is published by the World Advertising Research Centre (WARC) which reports annually on 19 advertising categories (food, financial services, travel and tourism etc.) and 7 media channels (TV, radio, newspapers etc)⁴⁹.

To estimate how much demand this advertising creates for advertisers' businesses we applied a category average return on investment (ROI) – revenue driven per £1 spent on advertising – from the Advertising Research Community Database (ARC).

ARC collects together results of econometric models that each evaluate 3 years of experience for an individual advertiser. It covers UK businesses over the period 2016 to 2020 that did not win an award.

Econometrics is accepted as one of the best methods for evaluating advertising because, although it isn't perfect, it is the only method that is capable of controlling for other things. This is important because advertising often airs at the same time as price changes, or when seasonal demand is at a peak.

While ARC is not a huge database – it contains c.400 cases – it is the biggest of its kind, and the only one that contains findings from a range of different research teams.

Each row is the culmination of an expensive 3-6 month long project carried out in collaboration with the advertisers concerned by expert econometricians at magic numbers, Omnicom Media Group, Data2Decisions, IRI, and VCCP media.

We triangulated our estimate of the amount of economic activity driven by advertising versus a study carried out by the Advertising Association and Deloitte⁵⁰. They found that for 2011 £1 of advertising spend contributed c.£6 to the UK economy, our estimates between 2013 and 2019 ranged from £5.50 to £6.30.

2. EMISSIONS IN ADVERTISERS' OWN PRODUCTION AND THROUGH THEIR SUPPLY CHAINS

The UK Office for National Statistics (ONS) publishes emissions intensities of greenhouse gases⁵¹ by industry in the UK. These are given in thousand tonnes of CO₂ equivalents per £1m of economic activity.

CO₂ equivalents is the main metric used in greenhouse gas reporting because it enables different emissions that contribute to warming to be reported together.⁵²

We applied these emissions intensities to our estimates of economic activity driven by advertising to provide an estimate for emissions from advertisers' own production.

For emissions through the supply chain, we carried out multi-regional input-output modelling. For this we used EXIOBASE⁵³, a database that captures trade flows between industries around the world.

Input-output modelling is useful because it traces back, from the UK industries that benefit from the effects of advertising, to their suppliers, and then their suppliers. This includes industries in the UK, Europe and rest of the world.

EXIOBASE also includes emissions per unit of revenue for industries around the world. This enables calculation of cradle to gate emissions in the same units as our earlier estimate of advertisers' own production.

While environmentally extended input-output analysis is well-accepted and used extensively in the carbon accounting literature (Hertwich and Wood, 2018⁵⁴; Cederberg, 2019⁵⁵; and Greenpeace and WWF, 2021⁵⁶), it does have significant limitations (Kitzes, 2013)⁵⁷.

These apply to our estimate along with others that use this method.

3. USE PHASE

So far there is no industry level database available to size emissions in the use phase of products that were produced and sold because of advertising.

Individual firms have carried out analysis of their processes and produced lifecycle analysis estimates (LCAs) for individual products like a shirt, or bleach⁵⁸, but unfortunately, there is presently no equally detailed database of advertising spend with which to match these figures.

Rather than exclude the use phase altogether, in order to illustrate the methodology to be applied across sectors, we identified one sector – Automotive – where a loose estimate for 2019 could be produced today.

To do this, we collected data on the ratio of use phase emissions to production emissions for vehicles sold in the UK. This included recent studies by Ricardo and the Low Carbon Vehicle Partnership⁵⁹, Greenpeace⁶⁰, WWF⁶¹, and national estimates from the Department for Transport⁶².

There was a good degree of agreement in these estimates, with emissions in the use phase typically around 4 times bigger than cradle-to-gate production emissions. We took the average of different estimates and applied it to our figure for emissions in the production phase to create our estimate of emissions in the use phase.

49 <https://www.warc.com/data/adspend>

50 <https://eaca.eu/wp-content/uploads/2017/11/advertising-pays-how-advertising-fuels-the-uk-economy.pdf>

51 <https://www.ons.gov.uk/economy/environmentalaccounts/datasets/ukenvironmentalaccountsatmosphericemissionsgreenhousegasemissionsintensitybyeconomicsectorunitedkingdom>

53 <https://climatechangeconnection.org/emissions/co2-equivalents/>

54 <https://www.exiobase.eu/index.php>

55 <https://iopscience.iop.org/article/10.1088/1748-9326/aae19a>

56 <https://www.sciencedirect.com/science/article/pii/S0959652618340447>

57 https://www.wwf.org.uk/sites/default/files/2021-05/uk_financed_emissions_v11.pdf

58 <https://www.mdpi.com/2079-9276/2/4/489>

59 <https://cdn.ricardo.com/ricardo/media/media/news%20assets/lowcvp%20study%20demonstrates%20importance%20of%20whole%20life%20co2%20emissions.pdf>

60 https://www.greenpeace.de/sites/www.greenpeace.de/files/publications/gp_cleanairnow_carindustryreport_full_v5_0919_72ppi_0.pdf

61 https://www.wwf.org.uk/sites/default/files/2020-04/FINAL-WWF-UK_Carbon_Footprint_Analysis_Report_March_2020%20%28003%29.pdf

62 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/882196/vehicle-licensing-statistics-2019.pdf

APPENDIX 2

USE ADVERTISING TO ENCOURAGE NEW SYSTEMS AND BEHAVIORS

As engineers of demand, the industry can play a unique role in accelerating the adoption of low-carbon goods and services through driving demand for their uptake and normalising new societal behaviours – and avoiding promotion of harmful consumption behaviours.

Through analysis of the potential 'Ecoeffectiveness' of previous advertising campaigns, we identified 3 ways to direct communications and media spend towards lower-carbon activity. They are:

1. ENCOURAGE POSITIVE BEHAVIOURS

To reduce its carbon impact, advertising should consciously depict responsible product usage behaviour, normalising low-impact decisions as the social norm, and raising awareness and understanding of new behaviours that will make a difference. This includes:

- Avoiding the depiction of environmentally irresponsible behaviours
 - *Example: throwing away waste, single person in a 5-seater vehicle*
- Normalising emerging behaviours which if adopted will reduce emissions
 - *Example: Gas supplier promoting active use of a smart thermostat in the home*
- Reinforcing existing low impact decisions
 - *Example: using more sustainable forms of transport like public transport and bicycles.*

2. BETTER PRODUCT USAGE

Advertisers focus on promoting products and services that encourage low carbon lifestyles and suggest a more sustainable, less disposable relationship with the products in their lives.

- Encourage people to reuse products and materials already in existence, as opposed to creating any new ones (within a circular economy system)
 - *Example: Furniture retailer promoting 'disassembly service' to encourage end of life return of products*
- Encourage people to switch to lower carbon alternative products
 - *Example: Food retailer encouraging a switch to meat-free alternatives*
- Encourage people to keep products for longer rather than replace them
 - *Example: Fashion brand introduces 'repair' service and more durable materials*

3. CARBON-FREE VALUE

Creating additional value for the advertiser through means that doesn't create additional emissions, unlocking advertising's great power to increase the perceived value of an item, and therefore get people to pay more for it.

- Create intangible brand value. Use advertising to increase perceptions of the worth of a product by making it seem more exciting, desirable, premium and rare
 - *Example: Airline drives profit per passenger by reframing long-distance holidays as 'once in a lifetime opportunity', not 'once a year treat'*
- Create value-add services that go beyond the product
 - *Example: Tech company profiting from digital products and services, rather than hardware*
- Upsell to the premium option
 - *Example: Automotive company sells the 'technology pack' that costs more and encourages more efficient driving*

Using the Ecoeffectiveness framework, every advertiser can find headroom to reduce its advertised emissions – through reducing harmful consumption behaviours and driving less harmful ones.

MAXIMISING ADVERTISING'S RETURN ON CO₂E

The defining challenge for modern advertising is this: how to continue to drive high levels profitability for businesses, while reducing advertised emissions to zero?

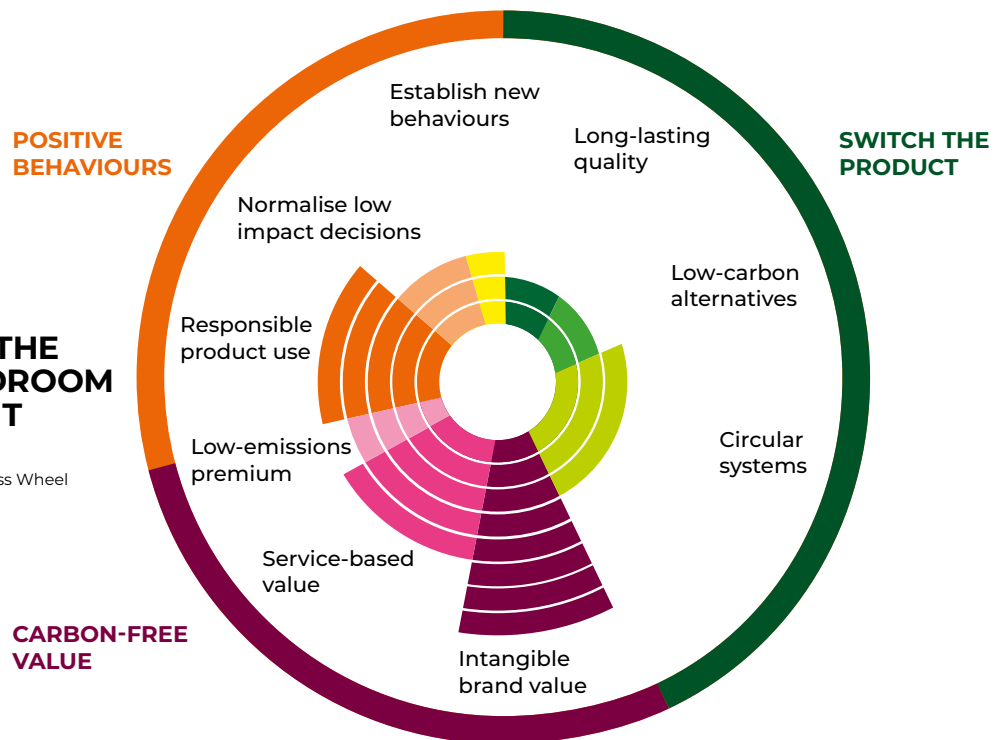
To measure success at this task, advertising can repurpose the principal of 'Return on Investment' (ROI). ROI measures the revenue and profit that is returned for every £1 spent on advertising. With a finite advertising budget, it calculates how hard each pound was made to work against its objective.

Return on CO₂e works the same way – but switches the currency to greenhouse gases. For every tonne of CO₂e emitted, it calculates the revenue and profit that was returned.

Over time, the task will be to maximise this return – and so reduce the advertised emissions without reducing the overall effectiveness and profitability of advertising.

UNDERSTANDING THE LEVERS AND HEADROOM FOR IMPROVEMENT

Source: Iris Strategy Unit Ecoeffectiveness Wheel



APPENDIX 3

ADDITIONAL EXISTING INITIATIVES

The idea of taking responsibility for the carbon impact of advertising is an idea whose presence is accelerating across the areas shared. Embracing the idea of Advertising Emissions can be a unifying idea that provides a common currency for all, to advance all. There are a variety of initiatives already happening that are examples of Advertised Emissions or are related:

CLIENTS

- Unilever has identified that nearly 70% of their GHG footprint occurs in consumer use and it committed to working with others, including their agencies, to reduce them
- Within the client community, the WFA's Planet Pledge⁶³ and training seeks to 'Harness the power of marketing communications to drive more sustainable consumer behaviours'
- IKEA has calculated that 20% of its carbon footprint is contained within 'product use at home'. To accelerate this reduction, it has advertised its innovate 'buy back and resell' service.⁶⁴
- Cold-water washing campaigns such as P&G's Ariel 'Turn to 30°' have helped cut 58,000 tonnes of CO2 emissions by educating consumers to save energy⁶⁵
- Alternative protein brand Quorn worked with the Carbon Trust to calculate the carbon saved through encouraging a switch away from meat. 3.8 million kg of CO2 were saved in 2 months after the launch of the brand's 'Helping the planet one bite at a time' advertising campaign⁶⁶

AGENCIES

- Iris, the global advertising agency, have adopted a new business traffic light system built around three questions:
 - **Who** are they? Are they a high carbon client? What is their ESG rating? Are they serious about decarbonisation? Do have a clear, credible net zero strategy?
 - **What** is the scope? Will our remit allow us to help them reduce their impact? Or are they engaging us to help them greenwash their image?
 - **How** will the relationship work? Will we be able to ask difficult questions? Are they looking for our help in solving the climate problem?
- If there are red flags around these questions, agency leadership has an open debate before deciding whether to work with that client on that project. Sometimes the outcome is an open, honest dialogue with the client about the environmental challenges that need to be faced – to test the opportunity for collaboration in solving it.
- Agency Nice and Serious use their 'Moral Compass' app⁶⁷, available to all. It allows all staff to view and vote on incoming briefs. If the majority of staff agree the agency should work on it, they progress. If they don't, they don't.
- Purpose Disruptors #ChangeTheBrief Alliance⁶⁸, is a not-for-profit partnership between agencies of every size and type – media, creative, design, PR – and their clients, learning and acting together to

directly address the challenge of the climate crisis by promoting sustainable lifestyles via every channel available to them. It includes an online learning platform and community. Founding members are Havas, Omnicom and WPP.

- GoodLife 2030⁶⁹ is a project which brings the advertising industry together to create collective visions of the future in 2030 inspired by visions from the UK public. It was created by Purpose Disruptors together with over 100 industry leaders over six months in 2021. Deep research was conducted with the Insight Climate Collective exploring visions of the future with three segments of the mainstream UK public who make up 42% of the population. Their insights into what a Good Life in 2030 is like informed a creative brief that agencies responded to – creating adverts for 2030. These, together with a short documentary film featuring industry leaders describing their relationship to climate and the changes needed at this time will launch at the IMAX cinema at Cop26. In 2022 the workshops developed with industry leaders will be rolled out across agencies enabling them to go on an immersive journey, hear the citizens' voices and imagine their own visions of a good life in 2030. They can then explore together the shifts that need to happen in their agency and the industry.

MEDIA OWNERS

- Swedish newspaper Dagens ETC ban all fossil fuel advertising i.e. Big Oil, cars, flights etc (September 2019)
- British newspaper The Guardian bans fossil fuel advertising (January 2020)
- Campaign against New York Times to ban fossil fuel advertising (September 2021)

REGULATION AND GOVERNMENT

- City of Amsterdam bans fossil fuel advertising (December 2020), City of the Hague bans fossil fuel advertising from bus shelters (October 2021)
- France passes law to ban fossil fuel advertising, with ban on high-polluting cars to follow (August 2021)
- European Citizens Initiative for an EU-wide ban on fossil fuel advertising and sponsorship accepted by EU Commission for EU citizens' signature (June 2021)
- Local councils in England (Norwich, Liverpool and north Somerset) are introducing measures to end high-carbon advertising
- Competition and Markets Authority coordinates a global review finding in 50% of online green claims may be misleading (January 2021)
- Competition and Markets Authority issues new Guidance on misleading green claims and plans to enforce it from 2022
- Advertising Standards Authority announces a series of issues led enquiries into misleading and socially irresponsible green claims that will focus on the Climate Change Committee's identified priority areas for consumer behaviour change and carbon reduction. (i.e transport, energy and heating, waste, meat, dairy and food sustainability claims)

63 <https://wfanet.org/leadership/planet-pledge>

64 <https://adage.com/creativity/work/ikea-will-buy-back-your-old-furniture-black-friday/2287521>

65 <https://www.marketingsociety.com/the-library/2010-ariel-marketing-sustainable-consumption-case-study>

66 https://www.warc.com/content/paywall/article/APG/Quorn_Rethinking_planning_for_the_coming_storm_How_planning_can_help_the_planet_one_brand_at_a_time/en-GB/138753

67 <https://moralcompass.app/>

68 <https://www.changethebrief.org/>

69 <https://www.goodlife2030.earth/>

APPENDIX 4

ADVERTISED EMISSIONS AS PART OF THE INDUSTRY'S SCOPE 3 EMISSIONS

To accelerate the adoption of Advertised Emissions within the advertising industry the concept should be included within its Scope 3 emissions.

Under the GHG Protocol, the global standardized framework to measure and manage greenhouse gas emissions, an organisation's emissions can be classified under three scopes:

	DEFINITIONS BY THE GHG PROTOCOL ⁷⁰	RELEVANCE FOR ADVERTISING AGENCIES AND MARKETING SERVICES COMPANIES
SCOPE 1	Direct GHG emissions that occur from sources owned or controlled by the reporting company	Heating offices and running company cars
SCOPE 2	Indirect GHG emissions from the generation of purchased or acquired electricity, steam, heating, or cooling consumed by the reporting company.	Electricity supply for lighting and equipment
SCOPE 3	All other indirect GHG emissions (not included in Scope 2) that occur in the value chain of the reporting company. Scope 3 can be broken down into upstream emissions that occur in the supply chain and downstream emissions that occur as a consequence of using the organization's products or services.	<ul style="list-style-type: none"> • Business travel (e.g. flights to meetings) • Employees commuting • Waste disposal • IT equipment and other goods • GHG emissions associated with production of advertising (e.g. calculated with AdGreen's Carbon Calculator) • GHG emissions from placing advertising within media (e.g. calculated with the Media Carbon Calculator) • GHG emissions that result from the uplift in sales caused by advertising (i.e. Advertised Emissions)

Currently, advertising and marketing communications companies do not include the emissions associated with the work they produce as part of their scope 3 emissions. Yet, the impact the work has on consumers, through increasing sales, can be seen as “a consequence of using the organisation’s products or services”.

Further, the GHG Protocol⁷¹ is clear that a reporting company includes, within its scope 3 emissions, those things which it has influence over and can therefore reduce. It defines ‘Influence’ as: “Potential emissions reductions that could be undertaken or influenced by the company” and specifically “companies should prioritize activities in the value chain where the reporting company has the potential to influence GHG emissions”.

Any agency or media owner has an influence on the advertising it produces and shows. It has a choice over the clients it works with and the products it promotes. It can adjust these as a means to drive up, or down, the consequential GHG emissions that result from successfully driving sales with consumers.

Advertised Emissions should therefore be included in scope 3 emissions of agencies and other companies within the advertising ecosystem.

Acronyms and Abbreviations

AA	Advertising Association
ARC	Advertising Research Community
CCC	Climate Change Committee
CO ₂	Carbon dioxide
CO ₂ e	Carbon dioxide equivalents
EV	Electric vehicle
GHG	Greenhouse gas emissions
IPA	Institute of Practitioners in Advertising
ISBA	Incorporated Society of British Advertisers
UNEP	United Nations Environment Programme
WARC	World Advertising Research Center
WFA	World Federation of Advertisers

⁷⁰ <https://carbonaccountingfinancials.com/files/downloads/PCAF-Global-GHG-Standard.pdf>

⁷¹ https://ghgprotocol.org/sites/default/files/standards/Corporate-Value-Chain-Accounting-Reporting-Standard_041613_2.pdf



About Purpose Disruptors

Purpose Disruptors are a community based organisation of advertising insiders working together to reshape the industry. Our vision is to help the industry transition so that it only creates work that is in line with a 1.5 degree world, and only promotes attitudes, values, behaviours and lifestyles aligned with halving emissions by 2030.

Purpose Disruptors were co-founded in 2018 by Lisa Merrick-Lawless, Rob McFaul and Jonathan Wise. The group hosted the UK industry's first Climate Crisis Summit, encouraged 160 CEOs to enable their staff to join the Global Climate Strike with Create&Strike and engaged 700 of the Purpose Disruptor community in The Great Reset, a campaign to maintain the positive environmental behaviours we experienced during lockdown. They were named in Campaign Magazine's list of Top Trailblazers of the Year for 2020 and won a Purpose Award for Collaboration: Best Environmental Cause Campaign in 2021 Alongside Advertised Emissions, key projects are ChangeTheBrief Alliance and GoodLife2030, both described in *Appendix 4*.

www.purposedisruptors.org



About Magic Numbers

Magic Numbers is a company full of data people with people skills, specialised in evaluating marketing and working with marketing people to put numbers to good use.

They help clients understand how their research and data fits together, identify the numbers that will make the biggest impact, and convert data into stories about growth and how to make it happen.

They are recognised for their expertise on advertising effectiveness. Including regularly judging awards entries, and publishing research in WARC, marketing week, and with the IPA.

www.magicnumbers.co.uk

