Insight
Climate
Collective.

Net-Zero In Sight

**A manual to drive collective and
individual action in the insight industry**

Contents

Foreword:

The world won't wait

Our industry was created - in part at least - to help businesses sell more stuff. And we've been very successful at that over the years.

This role, this goal, has given us front row seats to observe, measure and understand human attitudes and behaviour. We've developed great skills in how to use this understanding and expertise to enable brands, services and governments to build relationships with their audiences, engage with emerging cultural energies and behaviours, and ultimately influence them.

But now the script has changed. Selling more stuff is patently unsustainable. Unfettered consumerism has had such a profound impact on our climate and the ability of our planet to support us that it is universally recognised we are in an emergency, the like of which we haven't experienced before. The time left to fix it has all but run out.

The ICC is determined to draw a line in the sand for the U.K.'s £7bn research sector and enable our industry to pull its weight in this era-defining struggle. Our ambition is to harness the skills and talents of our industry to help respond to the climate emergency. Our sector has much to offer: our knowledge in how to engage with audiences and understand their concerns, our talents in how to present data and tell stories to inspire and drive change, our agility in how to navigate the new realities.

First, we must get our own house in order. As table stakes, we must reduce our own industry's emissions to Net-Zero, and this report outlines tangible and practical steps we can all take to do this.

In parallel, we must learn how to use our experience and skills, in partnership with our clients and other stakeholders, to help define, inspire, support and track the changes that must happen as we move to a sustainable future. In this report, we start this discussion. It is our ambition that you will join us and take it forward, amplifying our message as you go.

We call on every individual and company in the research, analytics, and insight sector to come together, to be part of the solution, and to take the actions outlined in this report. We urge you to join the debate, with The ICC and elsewhere, on how we can use our influence to have the most impact. Fundamentally, we want you to put Planet on an equal footing with People and Profit.

Only then will we have Net-Zero - and a sustainable future - In Sight.

Jem Fawcus,
Founder of Insight Climate Collective

'In a gentle way, you can shake the world.'

Mahatma Ghandi

Collective action for a collective solution:

Introducing the Insight Climate Collective

The Insight Climate Collective (ICC) was created as an independent group in June 2020, in response to the recognition that the insight sector lacked an organising force for climate change action.

We have drawn inspiration from multiple initiatives, such as Colour of Research (CORe) and the Advertising industry's Ad Net-Zero report, as well as the work of Purpose Disruptors.

We wanted to create a space for debate, dialogue, resource-sharing, education - and activism.

It is our belief that the insight sector has a responsibility - just as any sector does - to reduce its impact on the climate. Indeed, compared to some professional sectors - law and accounting, for example - it could be argued we have a heightened responsibility. Why? Because our work so often translates into the development of new products, the creation of new brands, or the shaping of communications to sell people more stuff.

And while consumption isn't bad in and of itself, humans' insatiable need for more and more stuff - and the ever more sophisticated ability of those who work across different spheres to recognise morphing demand and respond to it - is placing a heavy strain on our planet.

Of course, to focus on consumerism as the sole reason for accelerating climate change (for the pace of change is indeed accelerating) is overly simplistic. There are other factors to account for, such as the growing global population. But consumerist culture, and what it means for the planet, is one issue we can have a point of view on. Indeed, it's one that our colleagues and clients in the industry increasingly *need* us to have a point of view on.

Whether you have more of an optimistic stance as regards our collective global capability to address climate change, or a more pessimistic leaning, or somewhere in between, it's hard to disagree that there is an urgent need to act now. And that this action needs to be taken by everyone.

Business has to be part of the solution. The insight sector has to take responsibility.

When we talk about responsibility, this is not just about 'getting our own house in order', though this is crucial for true legitimacy, as we set out in this report. There's much more we can do.

This is where it gets exciting. Where taking responsibility isn't just about 'doing the right thing' and anxiously trying to turn the tide. It's about shaping new ways of working, it's about redefining the purpose of marketing and advertising, and our space within these domains. In short, it's about rethinking the future of business entirely.

We're just getting started, and there's much more we can do.

Join us.

'If you want to go fast, go alone. If you want to go far, go together.'

Maasai people of Kenya

Executive Summary:

Give me the headlines

You might be feeling a strong sense of urgency or even pressure to take action.

Perhaps you lack time to get into the detail of this report too.

Let's face it, you could spend hours each day reading about climate change more generally, or in a business context. You could immerse yourself in the science - and feel informed or fearful, or a mix of both.

You could feel you need to keep educating yourself in this complex and dynamic challenge.

And yes, we do need to educate ourselves. We need to be informed. We need to understand key terminology, key concepts, key climate science stats. We need to do this in order to have legitimacy in talking about climate change in our work context, and to feel confident to do so with senior colleagues, clients or naysayers, wherever they may sit.

But rest assured that we're all learning. Every day there's a new news item on a signifier of climate change in the natural world. There's a provocative new article, there's an interesting brand innovation, there's new science.

We're not climate scientists. Don't let concern about being informed hold you back from having a voice and trying to effect change. Within our industry, there are few climate-change deniers or doubters, as our own ICC research, which we will share in this report, will show.

So don't let doubts about how much you know hold you back.

The odds are good that any action you're going to take will be better than taking no action.

If you are asking questions and inviting dialogue about the responsibility of the insight sector, that's better than not considering this at all.

If you want to make a straight swap of an action that's plainly more carbon-intensive for one that treads less heavily on the planet (such as getting a train over a plane) then unquestionably that's worthwhile.

If you're wanting to measure your carbon footprint in order to work out how to reduce it most effectively, that's plainly a good thing.

Little changes alone won't be enough, in our work or personal lives. But that doesn't mean they're not worth doing.

So, for those who are short of time, or just desperate to crack on -

If you take nothing else from this report, focus on our 'big five' suggested actions.

The Big Five

i Find your climate champions

ii Report on, then reduce emissions

iii Remove what can't be reduced

iv Educate and engage

v Green your supply chain - especially your pension

Not all emissions are created equal: differentiating between Scopes 1, 2 and 3

— **Scope 1** covers the Green House Gas (GHG) emissions that a company makes directly on site

— **Scope 2** the emissions it makes indirectly - like when the electricity or energy it buys for heating and cooling buildings, is being produced on its behalf.

— **Scope 3** covers all indirect emissions not covered in Scope 2, for example:

— Business Travel (incl. Remote Working)
— Employee Commuting
— Leased Assets
— Waste Generated in Offices

*Source: **Carbon Trust:** Resources*

Net-Zero now, not tomorrow:

Why we need to take urgent action

What is 'Net-Zero'?*

Many of us will have heard talk about 'Net-Zero' targets for cutting carbon emissions. You've probably also heard about the link between these emissions and climate change, and the fact that they're rising to unsustainable levels. Levels that, if we don't tackle them now, will have catastrophic effects.

But what does 'Net-Zero' actually mean? And what can we do - as individuals and businesses - to achieve it?

Put simply, Net-Zero refers to the balance between the amount of greenhouse gas produced and the amount removed from the atmosphere. We reach Net-Zero when the amount we add is no more than the amount taken away.

Under the 2008 Climate Change Act, the UK Government set the 2050 target of cutting greenhouse gas emissions by 80% compared to 1990 levels. In 2018, mindful that the crisis was spiralling out of control, the Government asked the Committee on Climate Change to advise on a new target that would limit global warming to 1.5°C.

The Committee on Climate Change came back with a new target for the UK, and in June 2019, the UK became the first major economy to commit to 'Net-Zero' emissions by 2050. Essentially, this means reducing carbon emissions in line with the latest climate science, and balancing remaining residual emissions through carbon removal credits or offsets.

This is not tomorrow's problem: almost half the changes required to reach Net-Zero by 2050 need to take place by the end of this decade.

If left unchecked, climate change is disastrous for us and future generations, and will significantly exacerbate current threats such as food and water scarcity, which can subsequently quickly lead to conflict.

Economic analysis tells us that doing nothing will end up costing us a lot more. If we take action now, we will enjoy sustained economic stability and better lives - while reducing greenhouse gas emissions and building climate resilience.

By way of context, the UK's emissions have already reduced by 38% from 1990 levels. Before we get too complacent, this reduction is still far from enough and is still akin to a tanker approaching an iceberg. What's more, this reduction is largely the result of changing the way we generate energy, but now we need to look at changing the way we use energy, save energy and which energy we use. For example, the elimination of natural gas for central heating or petrol/diesel vehicles.
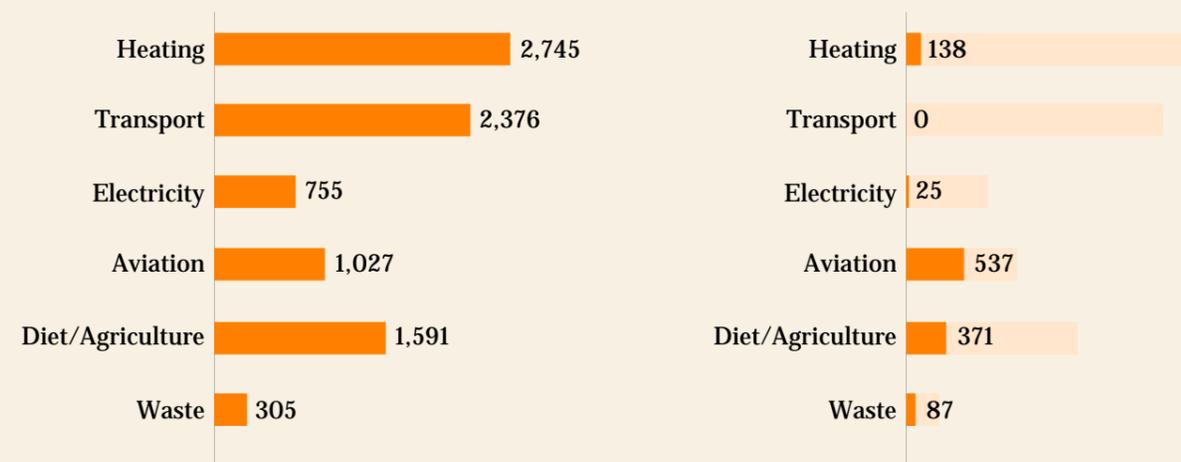
Work by the Energy Savings Trust - below - demonstrates the scale of the challenge across the key areas the UK's carbon emissions need to be reduced, and by how much.

UK average household CO_2 emissions in kg based on Energy Systems Catapult analysis

Energy Saving Trust - 2017

Heating	2,745
Transport	2,376
Electricity	755
Aviation	1,027
Diet/Agriculture	1,591
Waste	305
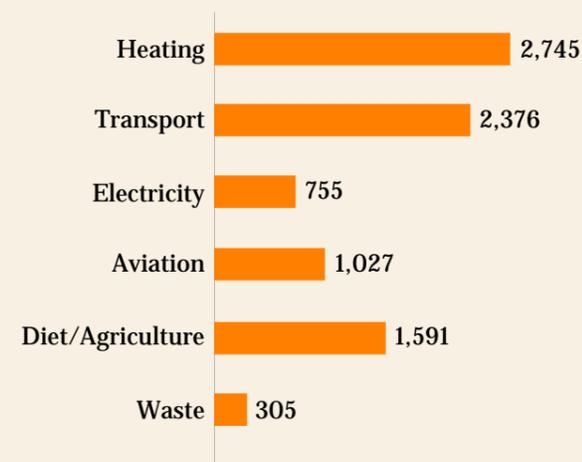
Energy Saving Trust - 2050 Net-Zero

Heating	138
Transport	0
Electricity	25
Aviation	537
Diet/Agriculture	371
Waste	87

www.energysavingtrust.org.uk/path-net-zero-overview/

But what can I do, what can my business do? Surely my impact is too small?

Inaction is the enemy and no action is too small. This is about collective action. It's about the cumulative impact of all our actions, individuals and businesses and saying 'I am going to do something', not stand by and wait.

The ICC has been formed to bring together conversations and give voice to all of us concerned about the climate; to influence our own sector to get its house in order, and to use our skills and resources to help our client partners take informed action.

What is clear is that an industry that is rich in behavioural and attitudinal insight and data, that helps our client partners develop successful business strategies that impact the world both environmentally and culturally, and that has historically been very successful at helping businesses 'sell more stuff' has a critical role to play.

We help our client partners develop successful business strategies that impact the world, environmentally and culturally, every day. And our industry has historically been part of the problem; helping businesses to 'sell more stuff'. We now, undoubtedly, have an important role to play in being part of the solution.
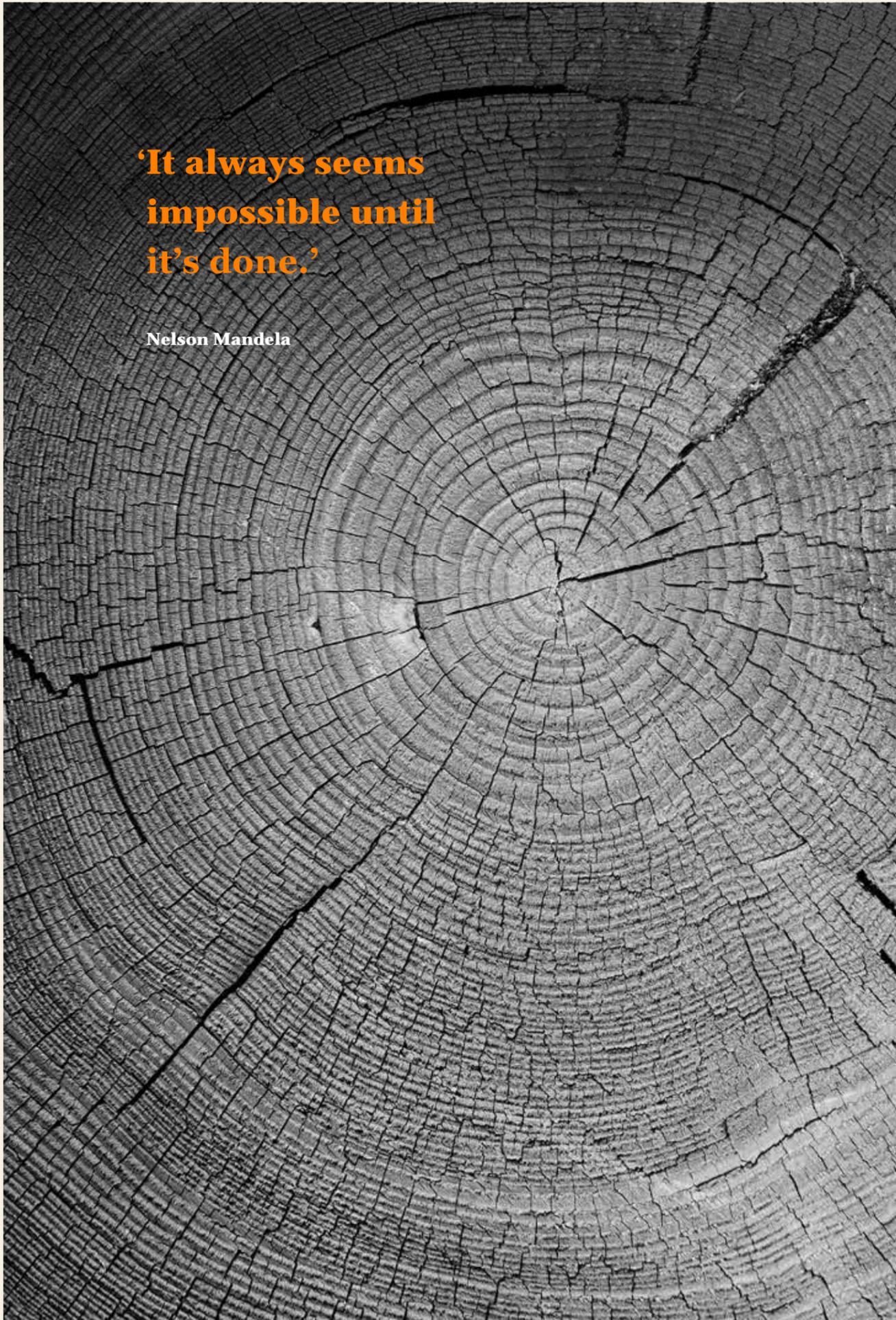
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* What is 'Net-Zero'?

[1]*United Nations Environment Programme: Emissions Gap Report 2020* Authors: UNEP, UNEP DTU Partnership

[2] SCIENCE BASED TARGETS INITIATIVE (SBTi)

[3]*World Resources Institute: Climate Action Must Progress Far Faster to Achieve 1.5 C Goal*

The Net-Zero In Sight Ambition and Action Plan

We believe that real change demands business as unusual. We cannot continue with our established ways of operating, agency-side and client-side, without wreaking further irreversible damage on the environment.

But we can make a difference if we start now, and we persist.

The cumulative effects of our industry striving to make a difference are worthwhile.

Our ambition is to reach real Net-Zero as an industry by 2026. What does this actually mean?

That means by 2026, we will take out as much greenhouse gas as we put in - so the amount that goes in needs to be minimal.

This means, effectively, nearly eliminating our emissions within the next four years.

This might sound unrealistic. But it is possible - however, collaborative ambition is required.

In 2019, before COVID-19, the estimated operational carbon footprint market research in the UK was **99,239 tonnes** of CO_2e. That's enough energy to power 12,000 houses[4] for a year, charge the world's 6.3billion smartphones twice[5] or drive to Mars[6].

In 2020, this footprint had almost halved to **54,912 tonnes**. The ambition of Net-Zero In Sight, and of CEOs committing to the MRS Net-Zero pledge, is to bring this figure to Net-Zero by 2026.

The process of arriving at these estimates (laid out fully in Appendix 2) has made clear that the market research industry is at the beginning of its path to carbon neutrality. But momentum is building: the insight industry is part of a groundswell of businesses setting Net-Zero targets as the north star guiding their COVID-19 recovery[7].

The stark difference between the figures for 2019 and 2020, reducing by almost half (see page 57-61 for details), shows us how drastically things can change. It also points to areas we need to focus on:

— **Air travel** - our biggest single emitter in 2019 and 2020 despite the effects of COVID-19 in 2020

— **Office energy -** our gas and electricity combined account for between 1/5 and 1/4 of our footprint

REFERENCES

[4] *EPA: Greenhouse Gas Equivalencies Calculator*

[5] *Statista: Number of smartphone users worldwide*

[6] *NASA: Based on 99,239 tonnes CO_2e powering an average car for 249,407,244 miles (EPA) and Mars being 300,000,000 miles*

[7] *United Nations Climate Change: Commitments to Net-Zero Double in Less Than a Year*

'It always seems impossible until it's done.'

Nelson Mandela

Our adaptation to remote work during the pandemic means that the future of both business travel and office life is up for debate in a way that it never could have been before.

As insight professionals, we often say that the formation of new habits is best sustained if launched around a life-changing event, so it's time to take our own advice. As we re-emerge from lockdown, businesses can use this opportunity to embed sustainability at the heart of their business operations. The latest IPCC report makes it clear: this is a code red for humanity and there is no time to waste[8]. This must be the decade of decisive action - and that starts with getting our house in order.

MRS company partners can now sign up to the MRS Net-Zero CEO Pledge, committing to make their business and the industry Net-Zero by 2026 (though agencies who are not company partners are encouraged to commit within the same time frame).

The 'actions' section of this report goes into detail and offers the wider picture of what the industry can do to be successful, but in a nutshell, we recommend you follow these steps:

i Find your climate champion(s)

Form a dedicated team to work on your strategy and create the time outside of their other responsibilities to make this happen. Ensure they have a clear remit and are empowered to take action. Increasingly, research and insight agencies will be expected by clients to have done work on their climate strategy. How will you credibly answer when your client queries what your own agency's commitment is?

ii Report on, then reduce emissions

Measure and report transparently on an annual basis, using credible standards such as the Greenhouse Gas Protocol, to ensure you are reporting and delivering effectively on your carbon reduction plans.[9]

Set a Science-Based Target to determine a programme for a reduction in line with a 1.5-degree scenario across Scope 1, 2 and 3. The SBTi website gives clear guidance on target setting and criteria on making an SBT claim (and there are nuances), but in a nutshell, this means a minimum of a 4.2% yearly linear reduction in emissions between now and your Net-Zero target date[10][11]. Given our shift to online meetings, this should be easily achievable for market research.

iii Remove what can't be reduced

The ambition of a Net-Zero target is to fundamentally restructure business to operate in a low-carbon way. However, it is unavoidable that some emissions will remain as part of the transition.

To reach Net-Zero, remove any carbon emissions which cannot be avoided through a verified supplier who removes carbon from the atmosphere[12] following the Oxford Offsetting principles, for example. [13] As the SBTI indicates, a company is only considered net-zero when it has achieved its long-term science-based target. Most are required to have targets with emission reductions of at least 90-95% by 2050: at that point, a company must use carbon removals to neutralize any emissions that cannot be eliminated.[14]

iv Educate and engage

Make time to educate staff not just on your own company's Net-Zero journey, but on the broader context: the climate crisis, its causes and solutions.

This is important not least because it is a source of competitive advantage, and clients need help in understanding people's behaviour in context. So, we have to upskill ourselves, and be ahead of the curve in terms of public demands, regulatory and societal pressures, and the multitude of factors required to effect the greatest impact.

v Green your supply chain - especially your pension

Work with suppliers and brands who also have a Net-Zero target and can demonstrate steps towards achieving this.

Do not underestimate the power of pensions - switching your pension to a sustainable fund is 21x more impactful than going veggie, giving up flying or switching energy provider.[15]

REFERENCES

[8] **BBC News:** *Climate change: IPCC report is 'code red for humanity'*

[9] **GHG Protocol Corporate Guidance**

[10] *The Science Based Targets initiative asks companies to commit to reductions in line with a 1.5 degree scenario for scope 1 and 2, and either 1.5 degree, well below 2 degrees or 2 degrees for scope 3. Strategies independently validated for large businesses (>=500). Targets must cover Scope 3 if Scope 3 accounts for more than 40%*

[11] **Science based targets:** *Understand the methods for science-based climate action*

[12] *For quality offset suppliers see:* **My Carbon** *or* **Gold Standard**

[13] **University of Oxford:** *The Oxford Principles for Net-Zero Aligned Carbon Offsetting*

[14] **Science based targers:** *The Net-Zero standard*

[15] **Make My Money Matter:** *Pension fund carbon savings research: A summary of the approach*
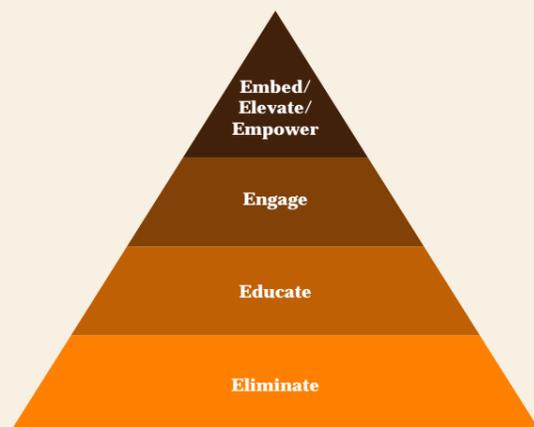
In 2021, Green Element undertook an analysis of carbon emissions of the UK research and insight industry. The findings are shared in Appendix 2.

8 From intent to impact:

Are you ready to play your part?

The pandemic has forced fast behaviour changes that we can build from as we move forward.

Stop flying as much. Stay grounded.

Flygskam embrace your inner Scandinavian

Flygskam is a Swedish word that literally translates as 'flight shame'. It is a climate change movement that encourages people to stop travelling by plane and, as a sector known for travelling the length and breadth of the globe, it's one that speaks loudly to insight professionals looking to play their part.

Air travel accounted for over half our emissions in 2019 and somehow, despite national lockdowns, almost a third in emissions across 2020. Flying is an incredibly emissions-intensive activity, especially if flying in business class or first class. One transatlantic trip in business class generates almost 2x an agency employee's total annual footprint.[16]

If we're going to meet our Net-Zero ambitions then it is unavoidable that we will need to fly less - but this might not be such a hard thing to do. Beyond financial and environmental benefits, online research can even mean doing *better* work. We can reach participants unconstrained by geography and hear from a diverse range of people who either couldn't attend or wouldn't feel comfortable attending in person.

We've re-emerged from this crisis with a different perspective on what can be achieved remotely, what constitutes a productive use of time, and what good research looks like. We also have, in the most part, the tools and skills to support a change. We are not alone in recognising this - analysts don't expect corporate internal travel (e.g. between offices for meetings) to recover to pre-COVID-19 levels. [17]

ACT NOW: ELIMINATE

As we've seen, achieving Net-Zero by 2026 requires us to reach a near elimination of our emissions as an industry. This means stopping actions that are damaging to the environment and unnecessary to the effective running of our businesses, and it means adapting our behaviours wherever possible.

Agencies need clear guidance on what constitutes an 'essential' flight. Beyond just business travel, employers can help staff cut individual carbon footprints too. When it comes to holidays, time is the main barrier to choosing low-carbon travel like rail[18]. Businesses accessing the Climate Perks initiative pay extra holiday allowance as 'journey days' to staff who travel on holiday by train, coach or boat instead of flying, empowering them to act on their values.

Stop using dirty energy. Switch to clean power

Switching to a renewable electricity provider is the low-hanging fruit for our sector and the simplest way for companies to make a major impact outside of flying less.

The MRS has partnered with Good Energy as a recommended supplier. As well as promoting decarbonisation in the UK by supporting the creation of renewable infrastructure (which few 'green' companies actually do), they provide support for businesses looking to make the switch, marketing collateral and certification, and offer a preferential rate through the MRS.

For agencies hosting their own data centres and servers, this step is even more crucial.

Currently, there is only a small supply of 'green' gas, and many suppliers rely on offsets to deliver gas on a carbon-neutral tariff. Agencies who own their buildings can explore installing a heat pump, which will deliver savings over time vs. gas boilers.

Our measurements show that we used less electricity and gas in 2020 than in 2019, but this is an incomplete picture: these emissions took place in workers' homes, rather than the office. In the winter, firing up boilers in leaky homes across the country can create more emissions than would be saved by not commuting[19]. In the future, we need to be more ambitious in our measurements and ensure we have all the data needed to make the right decisions.

Businesses can encourage employees to make the switch to green energy in the home - and it comes with benefits: Good Energy, for example, offers £100 off energy bills to partner employees who sign up through their work discount code.

As well as powering our buildings with clean energy, we need to think about how to use energy more efficiently. There are cost benefits to be made here too: improving our lighting, heating, ventilation, and air conditioning can save money as well as cutting carbon.

Stop personally investing in polluting industries. Invest in a future that doesn't involve a world on fire.

Every financial investment is an investment in one future or another, so the way the three trillion in UK pensions[20] is spent today will come to define what world we retire in. Investing pension funds in sustainability is one of the most impactful actions a person can take: over a lifetime, having a sustainable pension is 21x more impactful than going veggie, giving up flying or switching energy providers.[21]

Companies like Aviva, Scottish Widow and Nest have committed that their entire investment portfolios will be aligned with the Paris agreement, halving emissions by 2030 and reaching Net-Zero by 2050.

REFERENCES

[16] *Based on the average agency employee 2.55 tonnes CO₂e and a return business class flight from London to NY generating 4.78 tonnes CO₂e - Green Element and Flight Carbon footprint calculator*

[17] **Oliver Wyman:** *COVID-19 will challenge airlines for years*

[18] **Climate perks**

[19] **WSP:** *Office vs Home Working: How we can save our carbon footprint*

[20] **This is Money:** *Mark Carney and Comic Relief's Richard Curtis launch campaign to invest Britain's £3trillion pension savings in tackling climate change*

[21] **Make My Money Matter:** *Pension fund carbon savings research: A summary of the approach*

As RED C Research & Marketing MD Richard Barton noted:

6

'It's reassuring to know that our pensions aren't undermining the rest of our Net-Zero efforts'

The campaign Make My Money Matter[22] offers businesses advice about how to start a dialogue with their pension provider about their Net-Zero commitments.

Eliminate unsustainable sourcing: Commit to a sustainable supply chain

Questions around sustainability are increasingly part of our clients' procurement processes. They should be part of our own too. As a sector, it is our responsibility to make sure we are asking the right questions and greening our upstream suppliers.

Agencies where web hosting/cloud computing accounts for a large percentage of their footprint should be especially careful about the suppliers they work with. But this can apply to every supplier we work with - panel providers, catering companies, travel agents, office suppliers.

Some questions you can ask:

— **Do they have a Net-Zero commitment?**

— **Do they have any environmental standards or accreditations (for a large company: ISO14001?)**

— **Do they have a sustainability strategy?**

— **Can they tell you about anything they have done to successfully reduce their emissions or waste?**

Ultimately we need to arrive at a point where every purchase is seen through the sustainability lens. This can be through everything from the choice of menu at events (prioritise plant-based) to the electronics we buy (can we buy refurbished?). Resources to help determine a provider's credentials are available at Supply Chain School[23]; but otherwise, product standards such as B-Corp, Fairtrade, or FSC can help guide decision-making.

Rule out waste

Resource use drives half of the world's climate emissions and 90 per cent of nature destruction around the world[24]. The UK's use of resources, both renewable and finite, is twice the level considered sustainable[25].

Minimising waste is crucial to meeting Net-Zero goals. Following the hierarchy pictured, we should focus on preventing and reducing waste - challenging if we really need to buy, and if we do buy something, what the whole life cycle of that product looks like.

Source: Axill integrated services [26]

What Is Zero Waste to Landfill?

Prevent
⊘

Reduce
↓

Reuse
♻

Recycle
♺

Recover
↻

Dispose
🗑
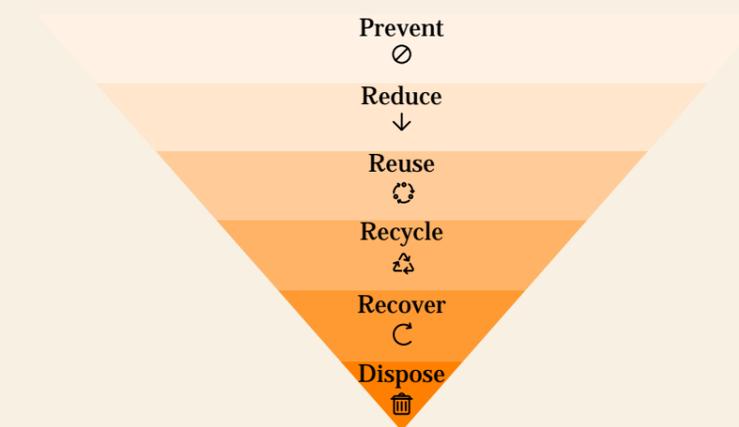
'Waste' is not just packaging that goes in the office bin, but *any* extra resources we use that might end up in landfill. Over the pandemic, the proportion of our footprint from IT software/hardware shot up from 9% in 2019 to 31% in 2020. We can expect this was driven in part by spending on extra IT equipment like laptops and screens to facilitate home working. It's worth knowing that many electronics manufacturers sell refurbished and recycled laptops, which prevents the extraction of new resources, and all electronics providers offer take-back schemes for old devices to be recycled where possible[27].

General waste and recycling account for only a tiny fraction of our carbon footprint. But though plastics don't account for many *emissions* per se, they devastate ecosystems and impact human health in ways we are only beginning to understand the implications of[28][29], so should be avoided.

Similarly, while water accounts for under 1% of our emissions, this doesn't mean it's a finite resource: areas around London and the South East are under 'severe' water stress, on par with parts of the Mediterranean[30]. Minimising water use in offices and at home should be a priority.

Our ambition should be to view every relevant business decision through the sustainability lens and challenge ourselves to justify that the decisions we make are fair within the context of the climate emergency.

REFERENCES

[22] **Make my money matter**

[23] **Supply chain sustainability school**

[24] **Resource:** *Green alliance report advises UK to halve resource consumption*

[25] **Resource:** *Green alliance report advises UK to halve resource consumption*

[26] **Axill integrated services:** *How to Achieve Zero Waste to Landfill Status*

[27] **Your Europe:** *Companies are legally obliged to offer free returns of products for recycling*

[28] **Science Direct:** *Microplastic might cause oxidative stress, cytotoxicity, and translocation to other tissues, and can as vectors for microorganisms & toxic chemicals posing further health risks*

[29] **The Guardian:** *Sperm counts are on the decline - could plastics be to blame?*

[30] **European Environment Agency:** *Annual water stress for present conditions and projections for two scenarios*

Stop business as usual:
Rethink business policy and target setting

Measuring our emissions is the beginning of our journey: the challenge is to develop a way of doing business that keeps us within the safe operating space for humanity. Businesses must treat their targets for emissions reduction as seriously as any financial target, and aim for genuine emissions reductions, rather than just baking in offsetting costs to budgets. The best way to make reductions is quite simply to set a target - ideally a science-based target[31] - and formulate a plan to reach it, giving staff the time and resources they need to make it happen.

Offsetting: It is unavoidable that even with ambitious reductions targets, some emissions will remain. Offsetting is a way of compensating for these remaining emissions. The offset market is extremely murky;[32] there is no regulatory oversight; many projects cannot quantify their reductions, and some never take place at all. Prices for offsetting a tonne of carbon can be as low as 1USD per tonne, but to directly remove carbon from the atmosphere and store it is closer to 1,000USD per tonne. Done properly, offsetting brings us closer to our Net-Zero ambitions. Done poorly we run the risk of greenwashing and invalidating our Net-Zero claims.

The offset market broadly sells two categories of offset.

— **Avoided emissions** - paying someone not to create emissions, or to create fewer emissions

— **Carbon removals** - paying someone to remove emissions

As the aim of being Net-Zero is to balance your carbon account and remove what you take in, so a credible Net-Zero claim will use carbon removals rather than avoided emissions. We also need to ensure that these solutions are as permanent as possible. For example, if a forest is planted to offset emissions, but the trees become sick or burn down, then the carbon comes back to our 'account' and the Net-Zero balance has been disrupted. A more permanent means of carbon removal is direct air capture, which sucks out CO_2 from the atmosphere. This nascent industry is expensive now, though costs are anticipated to fall drastically over the next decade.

Shockingly, only 5% of offsets bought are carbon removals at the moment[33]. Best practice guidance from the Oxford Offsetting Principles for Business recommends prioritising purchasing carbon removals and if a mix of offsets are needed, evolving the portfolio to move towards long-lived carbon removals over the next decades.[34]

Given that the price of a tonne of carbon removal starts at £50 scaling to over £160 by 2050 [35], it's reasonable that businesses need to start considering carbon costings in their accounting.

REFERENCES

[31] *See the Science Based Targets Initiative*

[32] ***The Guardian:*** *Carbon offsets used by major airlines based on flawed system, warn experts*

[33] ***Bloomberg:*** *Net-Zero Is Hard Work, So Companies Are Going 'Carbon Neutral'*

[34] ***University of Oxford:*** *The Oxford Principles for Net-Zero Aligned Carbon Offsetting*

[35] *Comparing the carbon price that would need to be applied at a national level to reduce country-level emissions with the cost to offset a tonne of carbon is not an apples-to-apples comparison but emphasises the scale of investment that may be potentially required to operate to 2050*

ACT NOW: EDUCATE

Climate change and concern for the environment is arguably one of the most pressing issues of our time, with 70% of people more concerned about the environment towards the end of 2020 than the year prior [36].

Studies have demonstrated that concern remains largely undeterred by wider social forces like the economy, political and social unrest and even a global pandemic. Concern for the environment is not a trend and shows only a likelihood to continue to grow both within the UK and globally[37].

Environmental progress touches everything we do - from the food we eat, to the transport we use, to the clothes we wear and the brands we support. Largely due to the pandemic, climate change is also increasingly being seen as more than just an environmental issue[38]. The repercussions of how we treat the planet and our own livelihoods is increasingly being recognised. It has become a social and health issue as well.

With shifting parameters that touch every aspect of our lives and which require all sectors to pull their weight, the market research and insight industry uniquely sits at the epicentre of decision-making for humanity's biggest challenge. Our role, as insight professionals, is integral in helping our clients drive effective initiatives and meaningful impact. In short, we have become the gatekeepers of climate progress.

We know this topic, by its very nature, is wrought with both reputational risk and confusion. Even in a broader sense, the general public are massively misinformed on the topic of climate change. Despite the fact that 7 in 10 globally claim they know what meaningful actions to take to reduce their carbon emissions, recent data suggests the opposite[39]. People do not understand the issue or its urgency. They also tend to overestimate the least impactful actions and underestimate the most impactful actions[40].

This 'education gap' extends throughout the professional world as well, and it can be commonplace for industry and government to pursue initiatives and projects that are misled or ill-informed due to the complexity of the topic.

As insight professionals, we have a responsibility to move past treating this issue as a 'nice to have' CSR project, whereby we stick an impassioned junior colleague on a research project with little senior expertise in the subject matter. We must, instead, be prepared to challenge briefs, facilitate deeper understanding and effectively layer insights to fully leverage the role and responsibility we have in this field.

So what can you do? Self-education on the topic becomes paramount. All insight positions, in a way, are sustainability positions. And we should seek to ensure a solid understanding of climate change and the environment is considered for every brief we receive.

We must seek to upskill ourselves on the topic, and to be ahead of the curve in terms of public demands, regulatory and societal pressures, and the multitude of factors required to leverage the greatest impact.

We must seek to effectively communicate and share our learnings with our clients, and not treat an environmental brief as an ordinary research brief, but one in which we can offer our contextual expertise so that we aren't going down rabbit holes or recreating the wheel.

We must seek to ensure that we are also doing everything we can to walk the walk, so that we are not just the conveyors of information - but 'partners' in the wider efforts in the climate change fight.

We must seek to learn to think as more than 'just a researcher' and view our role as advisory at its core. We must seek to help communicate the wider commercial imperative to our corporate clients and advise on strategy and positioning to ensure that such efforts are more than project bolt-ons but live on in the fabric of business and governmental operations.

As gatekeepers of progress in the climate change movement, self-education on the topic of climate change is paramount to our role as insight professionals. It is a journey with no clear end-destination and one that is constantly evolving. But understanding the gravitas of our role in the insight industry is key to the wider success of the climate change movement.

It starts with us, and our ability to distill meaningful and nuanced insights to drive decision-making at the heart of humanity's greatest challenge.

It can feel an overwhelming task to educate ourselves on climate change, and of course when we feel overwhelmed the risk is that we do nothing. The topic can feel vast, complex, and full of jargon. We don't need to be climate scientists, but a basic grasp of key terminology and some familiarity with the latest thinking, case studies and research on climate in a business context will prove useful.

In 2021, in preparation for COP26, the ICC worked with Purpose Disruptors on a project entitled 'The Good Life 2030'. The intention was to understand what a good life really means for people, to paint a picture of real aspirations for the future that may ultimately be compatible with a Net-Zero world.

We engaged with three segments from the Britain Talks Climate segmentation who represent 42% of the UK population. We purposely selected moderate segments instead of the more vocal liberal segments whose voices are more likely to be and are often the target audience for many sustainability-related messages. Our premise was that to accelerate the transition to a Net-Zero world we must reach outside of the typical audiences and bring more people along the journey first.

We designed an immersive research experience for citizens across these three segments, involving projective and creative exercises. We purposely kept climate out of the discussion for much of the process, and instead explored what a good life would look like in 2030 for each citizen, and for society and the planet.

The findings are detailed in reports which can be found on a dedicated website for The Good Life 2030*. The insight informed the development of a creative brief for three adverts to sell 2030 to people today. These ads and a documentary bringing to life the creative process were shown at COP26.

REFERENCES

[36] *Ipsos and EDF Climate Change Study 2019 & 2020*

[37] *Ipsos Global Trends Survey 2020*

[38] *Ipsos and EDF Climate Change Study 2020*

[39] *Ipsos Perils of Perception of the Environment 2021*

[40] *Ipsos Perils of Perception of the Environment 2021*

ACT NOW: ENGAGE

If our industry is to make a meaningful contribution towards a Net-Zero ambition, we must commit to sustained, applied engagement across the board.

We will achieve far more and achieve it faster if we work together. This means putting to one side typical barriers to collaboration - primarily competition - and engaging with industry peers in an open, generous partnership spirit. All in service of achieving a shared vision.

We must stay engaged ourselves, and engage other members of the insight industry to take up action through collaboration and effective partnership.

We can achieve this if we commit to the following:

Understand areas of need, and drivers and barriers to change

Build community, collaborate, promote debate and knowledge-sharing

Secure buy-in at a senior leadership level

Understand areas of need, and drivers and barriers to change.

As insight professionals, it's in our nature to start our work from the basis of a truly confident understanding of our challenge, and our target audience. We will undoubtedly bring this ethos to our collective effort in tackling climate change.

To support the need for understanding, the ICC has conducted a study of the attitudes of those in the industry towards climate change. The analysis shows that people working in the sector are very concerned about the environment and climate change.

Specifically with regard to drivers to change, based on our survey [conducted in February-March 2021] we see that the industry widely recognises that we are facing a crisis situation.

Insight professionals' attitudes towards climate change

95%

agree/agree strongly that climate change is an urgent issue

95%

agree/agree strongly that the planet is facing a crisis

89%

agree/agree strongly that we're headed for environmental disaster unless we change our habits quickly

82%

are concerned we're not decarbonising quickly enough in this country

92%

worry about the impact we are having on the planet

ICC Research Sector Climate Change Questionnaire,
Question B1 To what extent do you agree with the following statement: the planet is facing an environmental crisis. n=529
Question B2 To what extent do you personally agree with the following statements others have made about climate change? n=529

Overall, the data from our survey paints a picture of anxiety and a desire for change. We are pushing on an open door to invite discussion about what we can do about this anxiety.

Fear is a human emotion, of course, and in our concern around climate change, we are reflecting, worrying and projecting, as people, not merely professionals.

We are all consumers in and around our day jobs, and we bring to bear our wider hopes and fears around climate change from our personal lives and engaging in 'the world out there' to our ideas about the change we can (or cannot) make in a work context.

In our survey, we started with understanding the attitudes of people in the industry to climate change through this wider-lens view, knowing that the attitudes (drivers and barriers) and behaviours we report outside of work will have direct and indirect bearings on how we address climate change in our work.

We see that in our personal lives, we find it hard to make confident decisions on our purchase and general lifestyle choices with climate change in mind. It just generally feels 'too hard'.

It's important we reflect on these sorts of issues we experience in our personal lives because these will often be felt - and more acutely in some parts - by the general public. Naturally, it's essential that we don't assume that the rest of the country thinks like us (we know better than this as a profession) but it's safe to assume that if we see widespread challenges across those in our industry to adopting more climate-conscious behaviours then these will also be challenges felt by the customers and target customers of the brands we work on.

The following are key challenges to personal action reported in the sector (on a multi-choice question where respondents could pick all the barriers that applied to them):

44% It is difficult to make changes

27% It's a lot of effort to change my behaviour

26% I'm not sure where to start

'The climate impact of simple-seeming things can be incredibly complex and unknowable e.g. origin of parts, methods of shipping etc…'

'Getting hold of information you can trust about a product or company's sustainability takes time and effort. There is not enough time to do this for every decision you have to make day to day'

'It's not clear what is most important. All food has an impact; it is hard to understand which is worst. Big environmental groups often focus on relatively meaningless issues that don't offend their big corporate backers (e.g. plastic straws) rather than big issues like implementing processes for truly responsible fishing, and doing less of it'

ICC Research Sector Climate Change Questionnaire,
Question C7. How many of the following are factors, if any, that prevent you from doing everything you would like to in order to address climate change in your personal life?

More worryingly, and pointing clearly to an issue we can play a role in addressing as insight professionals, we lack trust in the information brands give us about their products sustainability credentials. A third (33%) of our sample listed this as a barrier to making more sustainable choices in their personal lives: 'I don't trust the information companies tell me about the sustainability of their products'.

And then cost can be a barrier, both for the everyday items as well as the bigger-ticket purchases. Nearly a quarter (24%) of our sample indicated this as a barrier: 'I can't afford to live a more sustainable lifestyle'.

— **'Affordability is the key issue for me, I don't earn enough to make significant changes/ updates that I would like to, but I don't earn so little that there is support available either. It's kind of a grey area'**

— **'I would say I do a lot of small things but for the big things it's a case of not having the money to change parts of my life e.g. the car we have, our windows, insulation'**

We also see that under half (39%) agree or agree strongly that they are doing all they can to tackle climate change in their work life.

Just as in our personal lives, in our work there is difficulty knowing quite where to begin and then what to concentrate on doing. Barriers demonstrate a lack of confidence:

— **I don't feel confident that I have the necessary knowledge to make a difference (43% agree/agree strongly)**

— **I don't know where to begin in a work context (46% agree/agree strongly)**

We also see enduring doubt that we can make a difference in our work; perhaps fuelled by a lack of confidence as well as the limited narratives to date on the role of the insight sector in addressing climate change.

— **I do not believe I can have much impact in the work I do (38% agree/agree strongly)**

And then for all businesses, actions to address climate change sit in a commercial context. Sometimes they may compete with short-term pressures, and this can for some be particularly true while navigating the disruption posed by the pandemic. Nearly two-thirds (61%) told us that: 'I believe my company has other priorities at the moment'.

This is an important barrier to pay heed to, within our own businesses and - for those who are agency-side or consultants - in dealing with clients. There will often be more immediate tasks, deadlines and problems that are burning more brightly in the here and now.

But as insight professionals, we are often not so much concerned with the past or even the present, but leveraging our understanding of those time-frames to project ahead. To shape strategies, to inform plans and launch products and communications that could last for years hence.

Employees perceive a range of barriers playing a role in preventing companies from taking environmental action.

These were all selected from a multi-choice question.

It's not an organisational priority	**55%**
It's expensive	**52%**
It's time-consuming	**40%**
Lack of guidelines and information	**36%**
Lack of demand for action from wider industry	**35%**
It's difficult	**34%**
Lack of demand for action from employees	**29%**
Lack of demand for action from partner organisations	**26%**
Lack of demand from the public	**21%**
There aren't enough existing success stories	**19%**

It is absolutely essential that we find ways of lifting ourselves out of the here and now and find ways to stretch our businesses' time-frames to anticipate better the longer-term risks and opportunities, and the need therefore to take action on climate change today.

We need to leverage our insight skills to listen out for the signals that change is coming (and needed). We can draw on expertise in cultural insight and trends, our ability to parse often vast amounts of data and qualitative information, and enrich our ways of looking at the future with frameworks from systems change and scenario planning disciplines.

It's not surprising that the top barriers are the fact that taking environmental action is not an organisational priority - or that there is a perception of a lack of demand for action - and the perceived expense.

But barriers around lack of guidelines and information, and the fact that it's seen as time-consuming and difficult to take action are issues we can address.

And in terms of need areas, we find the following, with specific reference to the change we can drive through our work:

— **Education to build confidence**

— **Guidance on offsetting**

— **Guidance on how to make conscious choices around which work to accept or turn down**

— **Education on how to influence clients to consider climate change in their work**

Build community, collaborate, promote debate and knowledge-sharing

The ICC came together through the recognition that we needed - as the name suggests - collective action.

There is only so much we can do in isolation. Change will happen much faster, and more effectively, through working together.

The ICC has created a community to tackle climate change as an industry. The first ask to readers on this action is related to our community.

Community

— Join our LinkedIn group, and invite colleagues to do so as well. Help us reach more people, across more organisations

— Consider signing the MRS Net-Zero pledge

— Stimulate engagement in our group through active participation in dialogue and events

— Consider what you can do within your organisation to foster debate and discussion, and drive change at whatever level you sit at

— Collaborate, promote debate and knowledge-sharing

— Work with us on our initiatives

— Collaborate with peers across the industry

— Meet people with like minds and shared passions, and those who will challenge and shape your thinking. And enrich the learning and development of others through your participation in this shared journey

— Pause and reflect on what you think most needs to be discussed and debated, and make your voice heard

— There are many myths and misconceptions about climate change and what stops people from taking action in their personal lives. It's common to point to the 'say-do' gap and believe that this is due to consumers not following through on what they claim is important to them. Consumers can even be blamed for laziness in this respect. To take this line is blame-shifting and fundamentally unhelpful to the goal of changing their behaviour

— One of the most important things we can do as insight professionals is to spotlight pernicious attitudes that blame consumers for their lack of action on climate change and instead turn the focus back on business

— Constructively challenge brands: are they doing enough?

— Are they truly doing a good enough job at helping consumers make more sustainable choices?

— Worse, are brands 'greenwashing'? Call this out. Challenge the brands you are working with as to whether they are talking about climate change with legitimacy or as a mere image exercise

Defining greenwashing

Greenwashing is the process of conveying a false impression or providing misleading information about how a company's products, aims and policies are environmentally friendly when in reality they are not.

Greenwashing can also take the form of over-simplification of the ways in which a products, aims and policies is 'sustainable' by highlighting attributes that are easily understood as environmentally-friendly, and purposely not drawing attention to other aspects that are less so.
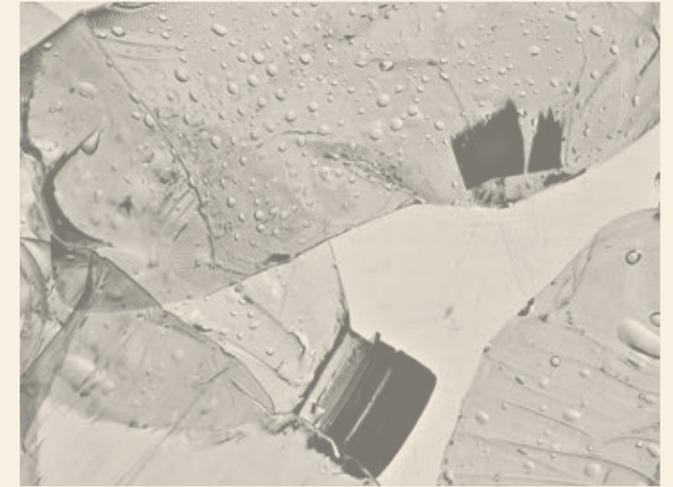
We will get further by recognising that numerous studies - including the ICC's own - point towards high and widespread levels of consumer concern but understand that there are numerous barriers to following through on that concern.

And that many of these barriers can be addressed by brands.

The issues that those in our industry experience in trying to make more sustainable choices across categories - the cost, the difficulty parsing the information provided by brands, the difficulty knowing what claims to trust - mirror those experienced by consumers.

On this point, Ipsos talks about the believe-true gap, and this is a useful way of looking at things and remembering the heart of the issue. It's much more useful to spotlight consumers' challenges in believing brands' sustainability claims than it is to focus on their lack of follow-through as if the onus on this is fully on them.

Stated factors preventing research and insight professionals from doing all they can in their personal lives to address climate change include (multi-choice question):

It is difficult to make changes **44%**

I don't trust the information companies tell me about the sustainability of their products **33%**

I often forget about more sustainable options **32%**

There are other issues in my life that are more important at the moment **31%**

It's a lot of effort to change my behaviour **27%**

I don't know where to start **26%**

ICC Research Sector Climate Change Questionnaire, Question C7. Which of the following are factors, if any, preventing you from doing everything you would like to address climate change in your personal life? n=529.

As insight professionals, we can bring to bear skills such as:

Triangulating data to cut through persistent myths and shed light on (changing) consumer sentiment.

'We have information at our fingertips or can influence what information/data is collected. By focusing clients/companies to capture more data in this area and link to the relationship of climate change with their success, it will help drive change within other industries/sectors.'

The capabilities to challenge misinterpretation of consumer sentiment.

'The research sector has a role to play as an advocate and trusted source of information for its clients and customers. By championing activities that actively consider and reduce environmental impact the research sector can contribute to efforts to mitigate the impacts of climate change.'

Behaviour change capabilities.

'We need to apply behavioural science theory to change human behaviour. The challenge is that behavioural change can be slow (decades) but climate issue is much more pressing to get sorted.'

Empathy with the consumer.

'We have our own challenges in changing our lifestyles so we should be able to empathise as we share difficulties with the general population. It's core to our jobs to bring an understanding of consumer attitudes and needs that goes beyond the superficial but looks to unpick the deeper motivations and barriers.'

Bringing the real consumer voice to life.

'Cutting through the data, pushing past the myths and helping businesses understand real hopes, fears, concerns and needs in a way that is genuine. Most large corporates need help to bridge their corporate sustainability strategies to the real consumer voice and experience. We play a crucial role here as insight professionals.'

'Use our ability to collect data and generate insight to promote changes with client business and consumer behaviour - lead the conversation.'

'Climate change is an existential challenge that humanity has to face. But however important it is, it's not urgent to the vast majority. The UK research sector sits in an interesting position - it has the capability and expertise to learn vast amounts about climate change and how individuals and institutions engage with the crisis. The sector can generate and communicate insights to boost public awareness, beliefs, and knowledge about the topic. And it should put pressure on civic institutions to facilitate change that would enable individuals to act in a sustainable way.'

Within this, there is clearly scope to challenge the role our sector can play in the future.

'Recognise we're not just measuring people's opinions, we also need to develop the skill set to measure the impact of initiatives/companies on the environment. Sustainability isn't just a marketing or brand thing, it's also a supply chain thing - so we need to help brands research impact there as well.'

All quotes are from ICC Research Sector Clmate Change survey, n=529.

Question - E9. Do you have any final thoughts you would like to share with us about what the UK market research sector should do to tackle climate change?

6 Secure buy-in at a senior leadership level

We work within ecosystems, both within our companies and with partner companies (whether clients, partner businesses, suppliers).

And while there is great power in a grassroots movement across the industry - which after all the ICC is here to help make happen - there's only so far we can get without senior buy-in.

This action point focuses on the change we can drive through influencing upwards in our organisations.

'Producing evidence-based results, aimed at Board level audiences, is key to what we can do as an industry. Promoting good practices within our own companies is an obvious step that can be facilitated by government guidance but we need to constantly bang the gong!'

Make it about company risk and benefit.
We can make this happen by pointing to:

Staff recruitment

— The signs are there more widely in culture that company values are increasingly important to reputation for staff recruitment purposes.

— The trend is towards more emphasis on considering general values, company purpose, and specific dimensions such as diversity and inclusion. A company's stance and actions related to climate change align with this, and can reasonably be expected to grow as a consideration for prospective employees

54%

agree/agree strongly
'I would consider a company's stance and actions on climate change prior to joining it.'

Staff retention

— Recruitment flows into staff retention. The general trend towards people interrogating more the purpose of their work - and its alignment to their personal values - can again reasonably be expected to translate into increased scrutiny of the environmental impact of their work, and indeed our data shows that most already see a connection from their company's climate action to their job satisfaction

82%

agree/agree strongly
'Knowing my company is taking steps to play an active role in addressing climate change would make me feel better about my work.'

Ensuring companies are fit for purpose to win sustainability-related work from clients, and compliance with changing client expectations or industry standards

— General governance - measurement, reporting and communications transparency - expectations of companies related to the climate (the E in ESG) are intensifying. Many agencies have been experiencing tighter procurement and information security processes in recent years, and questions about their sustainability policies are only - as yet - occasionally integrated into roster processes. Again, the trend can be seen - as client organisations bolster their scrutiny of their emissions, more and more emphasis will be put on tracking and controlling emissions in their supply chains (otherwise known as 'Scope 3').

Competitive advantage

— Ultimately, for any brand (consumer-facing or agency) that acts on climate change with integrity, its stance and actions can become a competitive advantage

We can guide our businesses towards considering:

Having a sustainability policy

48%

indicate that their company has a sustainability or environmental policy

Measuring their carbon footprints and investigating where they can reduce it

65%

say their businesses discourage printing unless needed

46%

say their company encourages travel through more sustainable methods where possible (e.g. train, public transport)

Consulting with staff and educating in line with agreed needs

48%

agree/agree strongly that they are in a position to make a difference on climate change in their work-life

39%

agree/agree strongly that they are doing all they can to tackle climate change in their work-life

Consider the work the company takes on - nature of briefs and sectors - ways to influence through the work chosen (or declined)

There is the perception that a range of actions can have value to help the sector minimise its impact and influence positively, and we can guide our businesses to consider not just how they can lessen their impact through their operations but also, crucially, through leveraging their influence.

When we asked insight professionals what they thought their businesses could do to have a positive impact on climate change, several types of action were perceived as relevant:

	No impact at all	No real impact	Neither an impact nor no impact	Some impact	Significant impact
Offset carbon emissions from its operations (e.g. Running its office, staff travel)	3%	6%	5%	58%	28%
Choose to avoid working in sectors that have a significant impact on carbon emissions	8%	18%	13%	39%	22%
Influence client-side organisations to consider climate change more actively in their work (e.g. In product development and communications) :	4%	9%	11%	48%	27%
Minimise its travel for fieldwork and meeting purposes post-COVID-19 (i.e. favour virtual working where possible)	1%	4%	3%	51%	40%
Champion for the inclusion of a 'green question(s)' in qualitative and quantitative RfQs to ensure sustainability is considered by clients when appropriate in briefing new projects	6%	10%	10%	55%	19%

ICC Research Sector Climate Change Questionnaire,
Question D1. As far as you are aware, which of the following does your company do, as applicable to its business? n=529

Question E7. Below are some things that the market research sector can do to play a role in addressing climate change. Please rate these in terms of how much of an impact you think they can have. n=529.

ACT NOW: EMBED TO ELEVATE & EMPOWER

Whilst getting our own house in order is clearly important, both for its own sake and to give us credibility in conversations with our clients and stakeholders, we are likely to have the most impact through the actions of our clients and in the wider world.

This section considers how we can harness both our skill sets as an industry, as well as our passion and desire to see change.

We don't have definitive answers, and in fact, our discussions often raise more questions than answers. Here we attempt to raise some of the issues in the fervent hope that they can become the basis for further discussion and action. The shared goal of all these actions is to ensure that climate considerations are at the heart of business decisions.

Traditionally, sustainability was led from the CSR department, mostly as a way to manage ethical considerations as well as avoid pollution fines. Profitability and shareholder value were still the main goals guiding business strategy. But there are clear signs that the world is going through a paradigm shift, where extraction-based capitalism is being challenged by citizens, consumers and the social sector.

Confronted with social pressure and potential losses, many corporations are left with no other option than reinventing their own strategy and transforming to become sustainable, ethical and greener. Increasingly, both social impact and sustainability are at the forefront of business propositions and corporate strategy. Many corporations are indeed adapting their own missions to embed social purpose and sustainability. According to Forbes, today, 90% of CEOs say that sustainability is fundamental for success. Many have already created dedicated sustainability leadership roles within the business.
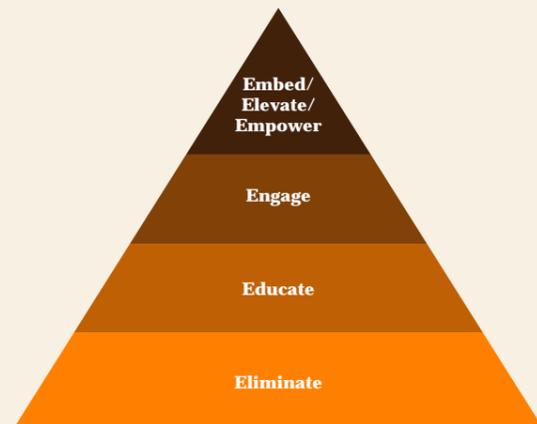
The time is right for the insight sector to have a role in not only being part of the movement but also in influencing the direction of these strategies. This is because the insight sector, rich in knowledge about human behaviour, has a critical role in ensuring that human-centred approaches supported by behavioural understanding can be used effectively in delivering sustainable solutions. Behavioural problems require behavioural solutions and insight is the cornerstone to infuse this knowledge into new propositions.

We are well placed to combine our expertise and desire for change in three main areas:

Embed climate thinking into our own businesses and work

Elevate our role in conversations with the business community, government and wider cultural conversations

Empower our clients and stakeholders to develop, set and execute their own climate goals

Embed climate thinking into our own businesses and work

As well as taking action in the infrastructure and day to day functioning of our businesses, we have clear influence in the design and execution of our work for our clients.

Businesses can develop a 'climate lens', whereby sustainability considerations are integrated into project design in the same way we innately design with budget and timings in mind. This can include considering more sustainable alternatives when designing methodologies, putting a carbon budget on the project, and also making sure the client has considered the wider climate conversation in their sample design.

We are also aware there is (sometimes passionate) debate within the industry as to whether we should take a stance on what clients we are prepared to work with. Whilst we see this as a matter for individuals and agencies to decide themselves, we can see parallels with other sectors (such as tobacco, gambling) where agencies have policies on industries they will work with.

As a springboard for implementing sustainability within the insights industry, we can learn from other sectors; for example, #changethebrief is an initiative in the advertising sector that encourages agencies and clients to overtly change the brief to focus on climate and sustainability issues.

At the very least we must make space for such conversations, and in particular, **empower** (often junior) colleagues so they feel safe speaking up and are supported by the sector as a whole. Sharing our experiences, learnings and ideas can help create an environment in which support can flourish and we can take effective, collective action.

There are multiple, actionable aspects to this area that can be applied on several levels. As individuals, we should consider climate change and sustainable actions within our day-to-day activities, e.g. methodologies proposed, the need for travel and recommendations. However, for businesses, it's essential to **elevate** the conversation to empower insight professionals and influence senior management, whilst impacting the business community by sharing evidence about climate change and consumer behaviour. This ties into our next pillar: **Elevate**.

Elevate our role in conversations with the business community, government and the wider society

Having discussed the integration of sustainability within the insight industry from an introspective lens, it's important to consider how we can positively influence sustainability on a wider scale. Here, our greatest opportunity is sharing our evidence about the issue and its links to human behaviour to a wider audience.

It is important that the sector is visible in the wider business community. Our knowledge as 'gatekeepers' of public opinion and experts in behaviour change has a strong role to play in how best to address the climate crisis. In order to do so, we need to continue to develop and share our learnings in this space. For example:

— **Continuing to learn and inform about the knotty questions like the difference between what people say vs. what people do, making sure we're continually sharing our knowledge and advancing our understanding**

— **Provide case studies and commercial information, stats and figures that can inform and enhance the wider conversation**

— **Showcase best practice in the industry, success stories, changes that work**

— **Prioritise sustainability in the assessment of industry awards and other flagship events**

— **Engage with Net-Zero In Sight and offer your support to initiatives emerging from COP26**

Empower our clients and stakeholders to develop, set and execute their own climate goals

It is clear that if we can influence the actions of our clients to take positive action, our impact will be much magnified.

This requires us to engage stakeholders in conversations at the highest levels utilising both logic as well as emotional engagement - the latter shown to be more effective than simply sharing data and information in conversations.

Whilst many of us are passionate about these issues, and fundamentally believe that changes must be made because 'it is the right thing to do' we must be wary of aiming to influence our clients by appealing solely to moral obligation. Rather, success will be more likely if we show the opportunities for commercial success in this space and the clear dangers of being left behind. The role of clear thinking, evidence and case studies here is paramount.

Once we have established a relationship of trust and evidence - rather than ideology - with our clients, we are more likely to be able to bring wider climate issues to the heart of the business conversation.

7 Conclusion and Next Steps

The time is now, now, now

Throughout this report, we have highlighted the pressing issue of sustainability, practical methods of addressing this area within your organisation, and the importance of education as a resource for tackling this issue effectively.

As a culmination of these points, it is imperative that we stress the necessity of taking such learnings into account across all facets of our organisations. Thinking introspectively helps us understand our role within this area and it's important to acknowledge where we as individuals (or individual companies) can improve. However, establishing sustainability dialogue and discourse as a key principle and motivator of our actions is the only method of addressing this area for the long-term.

Embedding a climate-focused perspective into the project level areas of our business and adopting a climate-lens alongside our typical financial and time constraints can ensure we take individual accountability for our actions. Extending this to the business level, we need to galvanise, encourage and enable our colleagues and clients to drive change with us.

This extends from junior colleagues to business leaders, and potential employees to investors: everybody has a stake in this challenge and we need to acknowledge this. Finally, at an industry level, we need to take our internal achievements and extend them into our wider business community to promote the collective effort. Sharing knowledge, practices, successes, failures, and insight within this area will only help establish a norm across our community and implement the change we need to see.

Overall, we need to acknowledge and address the think-do gap; we are all aware of the sustainability concern and we have the power to address it.

Together, we can do exactly that.

8 How to become a Net-Zero In Sight Supporter

There are three simple suggested actions:

Join the debate with the Insight Climate Collective

Sign (or encourage your agency to sign) the MRS Net-Zero pledge

Form a climate taskforce in your company, or if one exists, ask to engage with it

Acknowledgements:

Appendix 1

Case Studies

FIREFISH

In 2008, we decided to take action to improve our environmental credentials. Not only were our clients beginning to recognise the importance of ensuring sustainability through their supply chains, but people from top to bottom in business felt strongly about working towards a more sustainable future. We had done a lot of talking about it, but felt it was time to take action - not as a box ticking exercise but as a long-term commitment to reducing our environmental impact, engaging staff, and embedding good green practices within the business.

First up, with support and financial resource from senior management, we created a Green Team, made up of those with a particular concern in this area - and those from relevant parts of the business. From the outset, we wanted to ensure that whatever actions and initiatives we undertook were credible and effective. To this end, the Green Team was tasked with establishing a credible framework for improvement. After careful consideration we chose to work towards gaining ISO14001 certification for environmental management.

We hired Green Element as environmental consultants to help us get started, and we achieved certification in 2009 and have continued to maintain certification including transiting to ISO14001:2015.

ISO 14001:2015 sets out the criteria for an environmental management system (EMS), mapping out a framework to help monitor, measure, and improve environmental performance. As a starting point we developed an environmental policy setting out our aims as a business towards the environment and sustainability. We then looked at our biggest environmental impacts within the business and set yearly targets and objectives to reduce these.

Through a regular process of planning, implementation, training, checking, and corrective action, each year we set objectives and take action to reduce our environmental impact, year on year.

This annual setting of objectives to do better than the year before - combined with a rigorous assessment to check we have achieved it, has been the driving force of our success in the area, and has led to a large number of initiatives including:

— Creating a recycling scheme and getting rid of all individual bins. (People hated this initially, but it had by far the greatest effect on increasing the amount of recycling)

— Promoting sustainable commuting by providing cycling facilities, a cycle to work scheme and a travel loan for rail and bus season tickets

— Working with the green team to produce a newsletter, hosting green lunch club and taking part in walking challenges

— Making a procurement checklist template to ensure sustainability is considered in our purchasing decisions and setting up a CSR supplier questionnaire

Firefish have been instrumental in setting up the Insight Climate Collective, to mobilise the industry to react and respond to the climate crisis, which has included working with the Market Research Society on its Climate Pledge and we were early signatories to the pledge.

We strongly believe that it is important that all actions we take as a business are transparent, effective and credible - and where possible assessed or reviewed by a reputable body. For these reasons, as well as ISO 14001 environmental certification, we are currently on the journey to become a BCorp and are an Ecovadis silver medal holder.

We are currently calculating our carbon dioxide emissions and will be publishing them in line with the MRS Climate Pledge. We also intend to use the Science Based Target Initiative (SBTi) framework to ensure we have a clearly-defined path to reduce emissions in line with the Paris Agreement (and hopefully the Glasgow COP) goals.

We do all this because it matters to everyone in the business, it is something we care about and want to take a proactive role in a more sustainable future. But even if we didn't care, there are sound commercial reasons for taking action - companies that get left behind will find it harder to attract staff, and harder to get through procurement processes. Though it can feel a bit daunting to start with, it really isn't that complicated once you get started - and you are sure to find passionate supporters in your organisation to help you on the journey. Good luck!
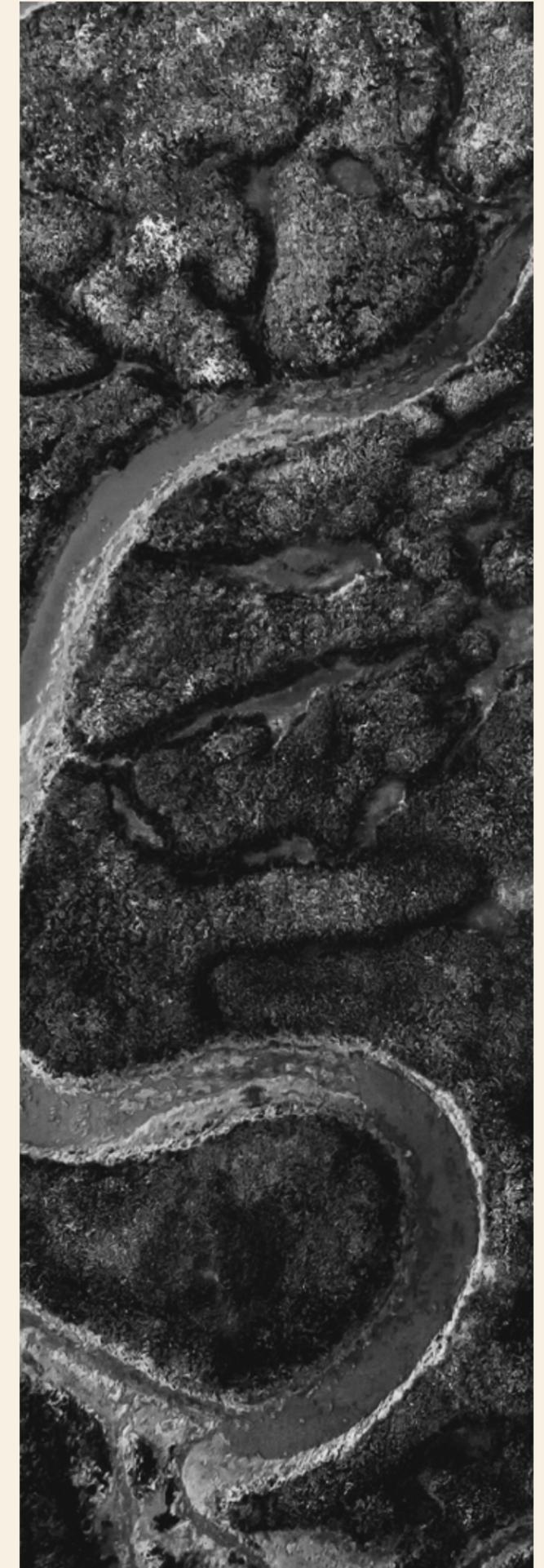
Case Studies

SAVANTA

Starting point

Savanta has a number of individuals who are passionate about sustainability, and has a dedicated CSR policy in place, but like many agencies, didn't have a formal framework or action plan in order to implement change on sustainability. In 2021, Savanta's parent company, Next15, decided to embark upon B-Corporation Certification, in conjunction with all the agencies it owns. This has meant that Savanta had a mandate to undertake meaningful change, implement new policies and report on these.

Approach

— Savanta's overall sustainability approach is guided by the 5 core B-Corp pillars: workers, community, environment, governance and customers. This useful framework helps to ensure that the agency is looking at sustainability from a 360 degree perspective (and not just purely environmentally) and that it is holding itself accountable for taking action

— In order to deliver against this, Savanta has internal BCorp champions and a sustainability and impact workstream. There is a detailed time plan for what policies and actions need to be undertaken by when, along with clear milestones to track achievement

Progress to date

— Recorded baseline emissions in 2019 and 2020. Currently setting SBTs for 2022 and onwards

— Net-zero by end of 2022 - using offsetting initially but reducing this and increasing the agency's reduction in scope 1-3 emissions

— Harmonising people policies across the various Next15 agencies in order to ensure that Savanta's commitment to our people is consistent, e.g. standardised pay and promotion policies

— Looking to implement processes to profile the types of projects the agency is working on, and their potential for impact on people and planet

— Monthly catch-up at Next15 group level to discuss changes and actions undertaken

— Internal sustainability and impact workstream to implement change within Savanta

Future plans

— The agency is holding itself accountable through external reporting - its sustainability commitments will be included in the Next15 2022 Annual Report, released in Spring of this year

— Introducing SBT for all agencies, including Savanta

— Recording the types of projects the business is working on both at a brand (Savanta) and group (Next15) level, along with introducing some guidelines on evaluating any potential ethical impacts of projects, including environmental impact

— Re-draft the agency's CSR and sustainability policies, taking into account developments from BCorp

— Looking to quantify the environmental impact of projects as part of proposals e.g. including the carbon footprint of an in-person meeting versus a virtual meeting

Recommendations for other agencies

— Aim for progress, not perfection. It's easy to get bogged down in trying to get really accurate details, such as baseline emissions measurements, which can be difficult to try and disentangle. Recognise that you won't be able to get everything you want, but it's better to do something (even if it's not quite right) than aiming for perfection and not being able to achieve anything

— Bring in experts where you can - some elements (such as target setting) require a certain level of technical expertise. While it's ideal to undertake as much as you can internally (and to minimise external spend) some things - such as published external target setting - are best undertaken with some expert guidance

— Determine how you will hold yourself accountable and set commitments - even if you don't have an annual report, understand how you can hold yourself internally and externally accountable

— Collaborate internally and externally as much as you can - traditionally MRX hasn't always been the most collaborative between agencies. But it's a great opportunity to connect with the wider industry about what they've done that's worked and build on the great ideas of others. As part of our work, we've been able to collaborate both with other Next15 agencies (including digital and marketing firms) along with others in the industry, which has given us fresh ideas and impetus for change

Case Studies

ZAPPI

Starting point

Zappi is a global market research tech company, delivering customer insights. In 2019, Zappi endeavored to address its impact on climate change, by influencing clients´ briefs as well as putting their own house in order.

In 2019, they set themselves to a journey of carbon neutrality with an initial goal of reducing their CO_2 emissions to Net-Zero.

Approach

Reduce first, offset second

Zappi was clear that they needed to make a significant effort to change the way they worked.

For Zappi, this involved four main steps:

— Thorough audit of Zappi emissions across main offices, satellite offices, and home-working

— Identifying best candidates for reductions; primarily air-travel

— Implementing reductions through policy, nudges, advice, and awareness

— Offsetting the remaining CO_2 emissions through a carefully chosen scheme (reforestation)

From the beginning, Zappi had used an in-house carbon emissions calculator to measure the CO_2 produced by their main activities. In 2019, Zappi was producing 917 tonnes of CO_2 per year distributed as:

— Flights - 64%

— Servers - 11%

— Commuting - 8%

— Lunches - 10%

— Office power usage - 3%

— Expensed travel - 1%

But in 2020, while Zappi grew aggressively, they managed to reduce 60% of their emissions, with 400 tonnes produced in 2020, resulting in a very different map than that of 2019:

— Flights - 42%

— Servers - 29%

— Commuting - 7%

— Lunches - 7%

— Office / Home power usage - 11%

— Waste - 1%

Of course, much of this reduction was driven by the lockdowns associated with the pandemic, with measurements showing a significant reduction in air travel and commuting, but also relative increases in emissions produced by the higher use of servers and home power usage.

But most importantly, their impacts were being measured and monitored by the organisation throughout this time, which is why their work is exemplary for any agency willing to do their part.

Once Zappi reduced what they could, they then offset the remainder of their emissions to reach Net-Zero.

Progress to date

— In 2021, Zappi tasked themselves with maintaining their per-capita levels while they continued to grow and some flying restarted, setting themselves a new target of less than 560 tonnes of CO_2. At the time of writing, they are on course to achieve this

— Besides measurement, important manifestations of their success are related to the environmental culture they have started embedding in the organisation

— Implementing eco-friendly changes - Eco-friendly offices, minimal aircon, timers on switches, zero-to-landfill policy, single-use-plastic free office, locally sourced food for in-office lunches, "nudges" in the office to keep them green, among other things

— Reducing flights - They work hard to make zoom meetings as manageable and personable as "real" meetings - reducing the number of needless flights

— Minimising commuting - They support cycling and the cycle-to-work scheme, and encourage people to flex their day to make commutes on public transport bearable and productive - and spend a lot of their time remote working

Offsetting

Zappi is ways looking for the most impactful and sustainable way to offset their footprint. They estimated that within a tech/service industry, £25-100+ per employee per year is required for rigorous offsetting. Zappi did this via reforestation and carbon-credits, with Reforest'Action.

In 2020, they planted 2,800 trees to offset their emissions of 400 tonnes. If they were to just plant trees (without the offsetting credit), this would cost them from $0.90 to $2.90 per tree, dependent on location. Rigorously certified "carbon credits" add to this cost.

To offset one tonne CO_2e, they plant seven trees and protect one tonnes-worth of rainforest. This gives them Verra Certified Offset Credit. This is done in Peru and South Africa, costing $14 and $19 per tonne respectively.

They consider...

— UN sustainability goals - i.e. they work with local people and organisations

— Biodiversity - they avoid monocultures

— Legitimate and transparent offsetting

— Engineering first-principles - do the numbers actually stack up?

Future plans

— Continue tracking CO_2 emissions

— Continue reducing emissions wherever possible, reducing emissions-per-employee every year

— Offset all emissions each year

— Build more of this ethos into our ways of working, ensuring the environment is central to more of our business decisions

Recommendations for other agencies

Get support from senior members to champion the cause:

— The support of a few senior people is key, but to make meaningful change you'll need support across the organisation. This helps drive engagement across the whole company

Measure, measure, measure

— You will need people keen to collate everything (Zappi has used work experience students in the past). This may involve the support of the office manager or someone who knows the company inside out and can help collating information on commuting, power/water meter, etc...

— You need a CO_2 emissions calculator. Zappi used an in-house one, but they also explain that there will shortly be an industry one. If in doubt, they suggest having a go at making one oneself recognising that an economics / engineering/ environmental background will help

— Please note that your calculations might look very different to theirs. In particular, Zappi is unusually light on paper use (and commutes), but heavy on server and data-centre emissions. It pays to choose a calculator and an approach that fits a particular business

Partners

— Zappi recommends that if an agency is going to offset, it's important to choose a reputable organisation to work with. They recommend an organisation that follows the 10 golden rules of reforestation, and that fits with the company's goals and values

— Besides Reforest'action, there are other organisations such as the International Tree Foundation or Forest Carbon

Experts

— They also had help from a Reforestation Advisor, who we'd strongly recommend

Conclusion

— Whilst there's no single approach that fits all companies, with a bit of work you can understand where your largest CO_2 contributions are likely to come from, how to best estimate those emissions, and how you might offset them

Appendix 2

Industry carbon footprint analysis

INTRODUCTION

The Market Research Industry has calculated a selection of estimated carbon footprints for the market research industry.

Data analysed is from the running of UK offices. Data from off-site activities has not been included.

The carbon footprints that have been calculated are as follows:

— The total carbon emissions for all people (38,985.12) working in the UK market research industry.*

— The total carbon emissions for all people (99,238.54 tCO_2e) working in the UK Market Research Industry in 2019.

— The total carbon emissions for all people (54,911.92 tCO_2e) working in the UK Market Research Industry in 2020.

— Normalised The Market Research Industry 's carbon footprint tonnes of CO_2e per person per year.

We have included data from seven companies in The Market Research Industry, taking data from 2019 and five companies in The Market Research Industry for 2020 to calculate an average carbon footprint for each year.

*total number of FTEs attained from Annual Report, from the
ONS Business Register and Employment Survey 2018

How is a Carbon Footprint Categorised?

Scope 1 Direct emissions from owned or controlled sources

Scope 2 Indirect emissions from the generation of purchased electricity, heat or steam

Scope 3 All indirect emissions (not included in scope 2) that occur in the value chain of the reporting company, including upstream and downstream emissions (15 categories)

Scopes and Boundaries of our Project

The Market Research Industry 's carbon footprint includes emissions from The UK Market Research Industry's offices for:

Energy – gas and electricity

Paper consumption

Water consumption

Transport – business travel from flights, rail and road (not including employee commuting)

Waste – general waste and recycling

Procurement – electrical items and food and drink

EXCLUDED FROM OUR STUDY

**The following is not included in this project.
However, these are aspects we wish to include in the future:**

— Data from off-site activities

— Direct data from all The Market Research Industry in the UK (this study includes a sample set of seven companies for 2019 and five companies for 2020)

— Spend was used as a proxy for some Scope 3 activities e.g., food and drink. However, this is not the most accurate unit of measurement. In the future we would recommend sourcing itemised lists of all purchased goods

HOW WERE THE COMPANIES SELECTED?

The following criteria were considered in selecting companies for foot printing:

— Availability of necessary data, within the specified date range 2019 and 2020

— Willingness and time to partake in the survey

### How is a carbon footprint calculated?

— A carbon footprint is measured in tonnes of greenhouse gas emissions (GHGs)

— Greenhouse gases are those which have a global warming potential (GWP)

— The main three GHGs are carbon dioxide, methane and nitrous oxide

— Emissions are converted into CO_2e, or carbon dioxide equivalent, a standard unit for measuring carbon footprints

— CO_2e expresses the carbon footprint as a single number with the same global warming potential as the sum of all the different greenhouse gases measured

How are GHG emissions presented?

The Market Research Industry's carbon footprints are presented in tonnes of carbon dioxide equivalent gases (CO_2e).

We have calculated:

— The total carbon emissions for all people (38,985) working in the UK Market Research Industry

— Normalised Market Research Industry 's carbon footprint tonnes of CO_2e per person per year
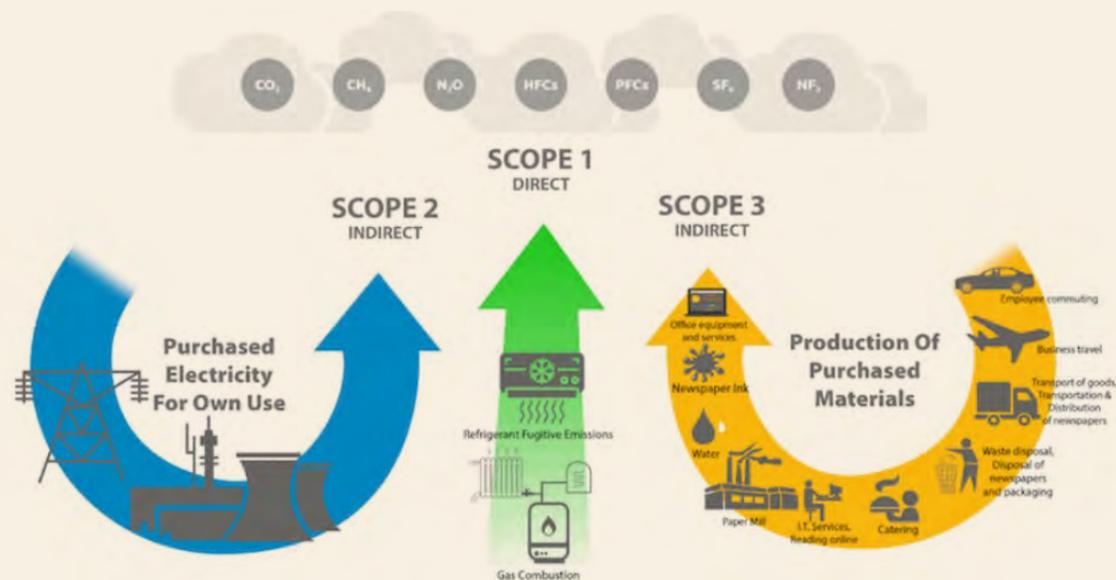
METHODOLOGY

Total carbon emissions for all people (38,985) working in the UK Market Research Industry

— Research used from the Annual Report, from the ONS Business Register and Employment Survey 2018 to assess the number of people working in the Market Research Industry

— 2019 data was used for seven companies

— 2020 data was used for five companies

— Using UK government carbon factors and consumption data (e.g. kWh for electricity) we calculated the total carbon emissions of our data

— We then used the total number of full-time equivalent staff over the data years to divide the total emissions into annual emissions per person

— The annual carbon emissions per person, or normalised emissions, were then used to scale up to the UK Market Research Industry by multiplying the emissions per person by 38,985

Normalised carbon footprint

— The Market Research Industry's carbon footprint is also presented in a normalised format in tonnes of CO_2e per person per year

— Normalised emissions were calculated in the steps used for the total carbon footprint

— Highlighting the emissions per person enables scaling up when predicting emissions for similar future projects and year on year comparisons

Carbon Footprint for all people working in the Market Research Industry

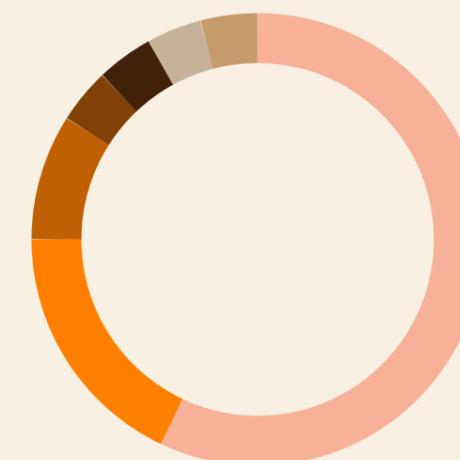Carbon Emissions (tonnes CO_2e) by Scope and Activity 2019

Activity	Scope 1 Emissions (tCO₂e)	Scope 2 Emissions (tCO₂e)	Scope 3 Emissions (tCO₂e)	Total Emissions (tCO₂e)
Air Travel	-	-	56,583.88	56,583.88
Electricity	-	14,297.53	3,377.48	17,675.02
IT Hardware, software	-	-	9,029.19	9,029.19
Gas	4,290.02	-	557.92	4,847.94
Catering	-	-	4,285.82	4,285.82
Offsite/cloud storage, hosting and processing	-	-	3,574.70	3,574.70
Paper	-	-	1,098.52	1,098.52
Stationery & Office equipment	-	-	809.05	809.05
Couriers	-	-	454.30	454.30
Road Travel	-	-	379.63	379.63
Taxis	-	-	273.28	273.28
Rail Travel	-	-	133.52	133.52
General waste	-	-	47.22	47.22
Mixed Recyclables	-	-	24.42	24.42
Water	-	-	20.10	20.10
WEEE waste	-	-	1.95	1.95
Total	**4,290.02**	**14,297.53**	**80,650.99**	**99,238.54**

*Location-based method used to calculate emissions from electricity, location-based method uses the average UK grid fuel mix.

Activities	
Air Travel	57%
Electricity	18%
Hardware, software	9%
Gas	5%
Catering	4%
Offsite/cloud storage, hosting and processing	4%
Others	3%

Green Element

Carbon Footprint per person
working in the Market Research Industry

Carbon Emissions (tonnes CO_2e) by Scope and Activity 2019

Total emissions per person = 2.55 tCO_2e

Activity	Scope 1 Emissions (tCO₂e)	Scope 2 Emissions (tCO₂e)	Scope 3 Emissions (tCO₂e)	Total Emissions (tCO₂e)
Air Travel	-	-	1.45	1.45
Catering	-	-	0.11	0.11
Couriers	-	-	0.01	0.01
Electricity	-	0.37	0.09	0.45
Gas	0.11	-	0.01	0.12
General waste	-	-	0.00	0.00
Road Travel	-	-	0.01	0.01
IT Hardware, software	-	-	0.23	0.23
Mixed Recyclables	-	-	0.00	0.00
Offsite/cloud storage, hosting and processing	-	-	0.09	0.09
Paper	-	-	0.03	0.03
Rail Travel	-	-	0.00	0.00
Stationery & Office equipment	-	-	0.02	0.02
Taxis	-	-	0.01	0.01
Water	-	-	0.00	0.00
WEEE waste	-	-	0.00	0.00
Grey Fleet	-	-	0.00	0.00
Total	**0.11**	**0.37**	**2.07**	**2.55**

Green Element

Air Travel Breakdown by Flight Class

In 2019 air travel contributed 57% to the industry's total
carbon footprint, this fell to 32% in 2020 owing to travel restrictions

Class Type	2019 Total tonne CO₂e	2019 % of total	2020 Total tonne CO₂e	2020 % of total
Unknown	4,490.55	51.82 %	2.66	0.23%
Economy	2,658.69	30.68 %	482.28	41.71 %
Business	1,147.10	13.24 %	467.56	40.44 %
Premium Economy	310.98	3.59 %	144.41	12.49 %
First	59.14	0.68 %	59.28	5.13 %

11

Green Element

Carbon Footprint for all people
working in the Market Research Industry

Carbon Emissions (tonnes CO_2e) by Scope and Activity 2020

Activity	Scope 1 Emissions (tCO$_2$e)	Scope 2 Emissions (tCO$_2$e)	Scope 3 Emissions (tCO$_2$e)	Total Emissions (tCO$_2$e)
Air travel	-	-	17,787.91	17,787.91
IT Hardware, software	-	-	17,277.02	17,277.02
Offsite/cloud storage, hosting and processing	-	-	7,527.56	7,527.56
Electricity	-	4,951.74	1,168.16	6,119.91
Gas	3,796.83	-	493.73	4,290.56
Catering	-	-	902.42	902.42
Stationery & Office equipment	-	-	385.38	385.38
Couriers	-	-	335.60	335.60
Paper	-	-	104.54	104.54
Taxis	-	-	102.32	102.32
General waste	-	-	27.47	27.47
Rail Travel	-	-	21.05	21.05
Road Travel	-	-	14.58	14.58
Mixed Recyclables	-	-	8.80	8.80
Water	-	-	6.80	6.80
Total	**3,796.83**	**4,951.74**	**46,163.34**	**54,911.92**

Green Element

Carbon Footprint for all people
working in the Market Research Industry

Carbon Emissions (tonnes CO_2e) by Scope and Activity 2020

Activities	
Air Travel	32%
Hardware, software	31%
Offsite/cloud storage, hosting and processing	14%
Electricity	11%
Gas	8%
Catering	2%
Couriers	1%
Other	1%