

Quicktake

 FTIDELTA™




Shooting (content) sustainably

How can media companies embrace more sustainable methods to produce content?

An average tentpole production generates 3.4k metric tons of CO₂e emissions

An average tentpole production emits 3.4k metrics tons of CO₂e, comparable to:



~700 cars over the course of a year



A U.S. supermarket over the course of a year¹

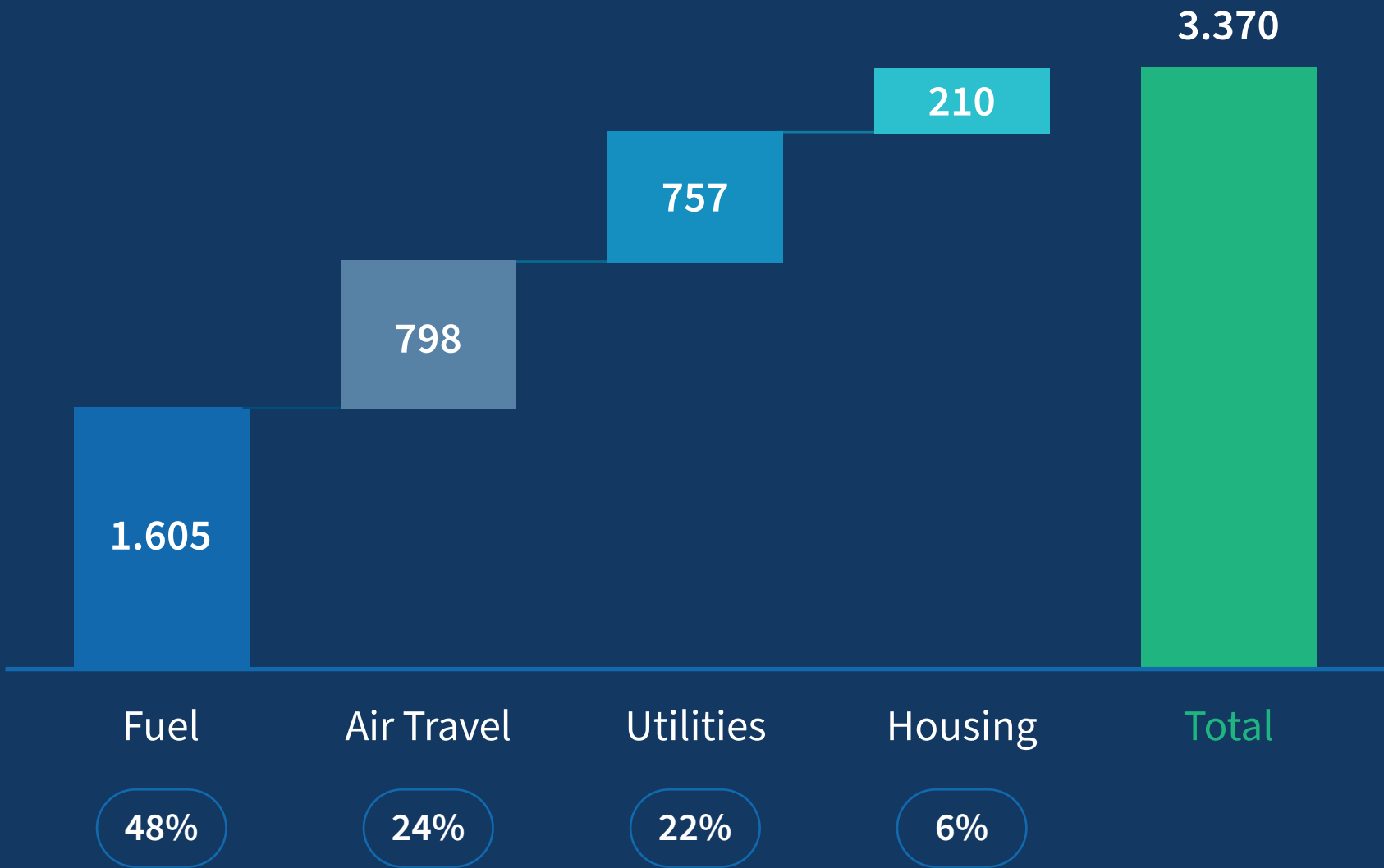


70 U.S. households over the course of a year



Average Emissions / Tentpole Production (metric tons CO₂e)

X% Percentage of total



Key takeaways

Excessive use of transport, especially individual vehicles, air travel and reliance on diesel generators creates a high emission footprint for productions

¹ Including the impact of leaked refrigerants, a U.S supermarket emits 2,939 metric tons of CO₂e in a year
 Source: Sustainable Production Alliance (2021); United States Environmental Protection Agency; GreenChill (United States Environmental Protection Agency partnership program); Center for Sustainable Systems (University of Michigan)

Several challenges have prevented the industry from fast adoption of more sustainable processes



Ownership

Lack of clarity regarding sustainability roles and responsibilities between production companies and studios



Fuel sources & materials

Limited availability of alternatives to reduce the impact of land transportation, air travel and diesel generators (typically used on location shoots)



Data management & reporting

Challenges to accurately measure and aggregate critical KPIs – including Scope 3, waste management, energy usage etc – to support clear and robust reporting



Industry adoption

Historically limited focus on sustainability, with >50% of production facilities having low to moderate sustainability measures in place

However, macro shifts are putting a greater spotlight on sustainability...



Regulation

Emissions **reporting**, sustainability **KPIs**, and ESG **metrics** are increasingly required by regulators.

- SEC rule proposal to implement GHG reporting & disclosure program for public companies
- Two EU regulations have been introduced; the Sustainable Finance Disclosure Regulation and the EU Taxonomy, with the objective to promote greater transparency and standardisation around classification and disclosure



New technology

VFX, CGI and virtual production are replacing the need for traditional resource-intensive production methods.

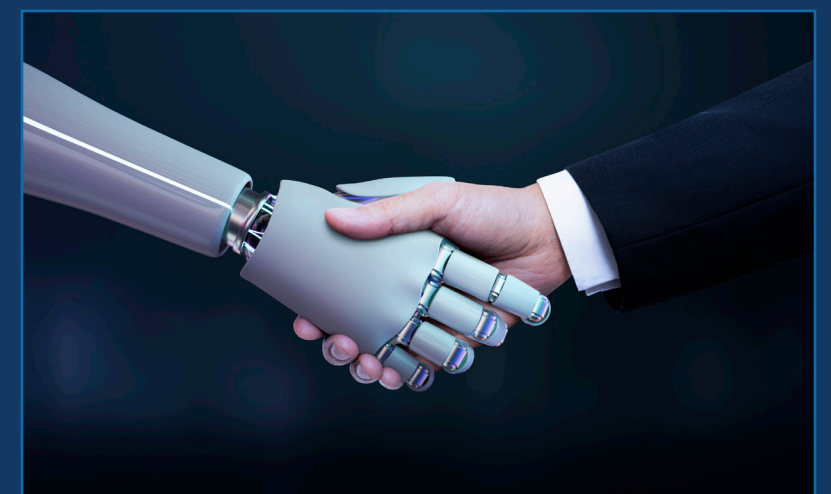
- Virtual production scenes can produce up to 75-80% lower GHG emissions than on-location scenes, through lower fuel and transport/travel requirements¹



Industry alliances

Industry players are building alliances to set guidelines for **ESG best practices**.

- Netflix, Amazon Studios, Disney and other major players have joined the Sustainable Production Alliance, an industry body dedicated to advancing sustainability initiatives and reducing the industry's overall environmental impact.



¹ Memorandum from Sony Pictures comparing GHG emissions from scenes of on-location and virtual productions

Source: U.S. Securities and Exchange Commission; European Commission; Sony Pictures; Sustainable Production Alliance

...with industry leaders now embedding sustainability into their operations

Set re-use

Drama series 'Joe Pickett' employed a practice of repurposing, renting and thrifting materials, utilizing them across various sets to minimize waste

Paramount

Power / Fuel alternatives

For Bridgerton Season 2, Netflix reduced reliance on diesel generators, increased amount of grid power and piloted hydrogen power units where there was no grid access

Netflix

Industry participation

The BBC, ITV, Channel 4, Sky, UKTV and Netflix have all made the albert carbon footprint calculator mandatory for productions

Albert

Sustainability officer

In 2020, Netflix hired its inaugural Sustainability Officer to lead a dedicated team to reduce pollution by using clean alternatives

Netflix

Reporting tools

The BBC developed a reporting platform for all BBC Group environmental data including emissions, waste, water and bio-diversity

BBC

Air travel emissions

SABA is accelerating the path to net-zero aviation by driving investment in, and adoption of high-integrity sustainable aviation fuel, supporting companies, airlines and freight customers in achieving their climate goals

SABA

Several initiatives can be explored to enable more sustainable production

 Governance	Establish chief sustainability officer function and set up a sustainability task force
 Targets	Set and communicate sustainability goals
 Operations	Implement specific initiatives to reduce emissions footprint from productions (e.g., electric vehicles, food sources, renewable diesel)
 Tools	Develop data management capability to systemically track ESG metrics
 Technology	Assess and embed digital filming solutions to reduce productions' reliance on high material-consuming sets

We can support media and production companies to define their sustainability roadmap



Sustainability strategy & roadmap

What are the key priorities and which areas drive the biggest impact?

What are the short and long term best practices that will drive the most sustainability value for studios and productions?



Communications strategy

How to set and communicate both the short and long-term goals?

How to track and meaningfully communicate metrics, goals and KPIs to critical stakeholder groups?



Initiative implementation

What are the quick-win initiatives?

How to drive accountability and manage successful implementation?

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