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**OUT
MARCH
2024**

A manifesto for the world's advertising industry to change the way we work and the work we make

www.sustainableadvertising.uk



Building a More Trusted, Sustainable and Inclusive Future for UK Advertising

STEPHEN WOODFORD

Chief Executive, Advertising Association

The first year of our new three-year strategy, covering 2023-25, has been about making progress once again on how we promote responsible advertising and its value to the UK's economy and society. The strategy, which focuses on public trust, inclusivity, and sustainability, has strong backing as its top three priorities from our Council members, who reflect the breadth of our industry. It has also led to the formation of two new industry task forces: the first addressing the talent shortage and the second exploring the impact of Artificial Intelligence on our industry.

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We have also doubled down on our efforts across our existing workstreams. A second All In Census, conducted in March, in partnership with ISBA and the IPA, generated a fantastic dataset from nearly 19,000 advertising and marketing professionals, providing invaluable insights into industry trends and employee well-being. Ad Net Zero has expanded its reach into new territories, with the launch of Ad Net Zero USA in February and in New Zealand in August. We ran our biggest trade mission yet to Cannes Lions, and new research on public trust in advertising was released in September. Additionally, record-breaking UK advertising exports were announced, totalling £15.6 billion, and media literacy initiatives through Media Smart were strengthened.

2024 will be a record-breaking year for elections, with more people voting around the world than ever before, so we are ramping up engagement with policy makers. Our Public Affairs team has been renamed Policy and Government Affairs to reflect the increased focus on outreach to Parliamentarians, civil servants and regulators. There will be a new UK Government in the next 12 months or so and we will be engaging with all the parties pre- and post-election, to make the voice of the advertising industry heard and promote its role in the sustainable growth the UK economy so desperately needs.

Our commitment to being together, as a team and with our many members, will take a new shape in 2024, when we move to a long-term base in Aldwych, after a short-term stay in Berners Street. We are very much looking forward to welcoming our members to our new home and we are delighted to already be seeing more people in person, as the world returns to more familiar ways of working.

Looking ahead, we will continue to prioritise key areas such as making the economic case for advertising to be viewed as an investment, not a cost. Also key will be our ongoing work to rebuild public trust in advertising, address the talent shortage, foster a more inclusive workplace, advance climate action initiatives, support the UK's transition to net zero, promote employment opportunities, and fulfil our responsibilities to individuals, society, businesses, and the economy.

We are determined, as ever, to work collectively to strengthen and promote our industry, staying true to the principles of our founders nearly a century ago. When this three-year strategy is complete, we will enter our centenary year – our team is committed to delivering the critical work to shape a sustainable and responsible long-term future for the UK's advertising industry and everyone that works in it.

“

We are determined, as ever, to work collectively to strengthen and promote our industry, staying true to the principles of our founders nearly a century ago.

”



Our Industry is Only as Good as the People Who Work in it

ALESSANDRA BELLINI

President, Advertising Association

Talent was the golden thread running through the Advertising Association's work in 2023. We launched our latest Credos research at LEAD in January, exploring the factors affecting recruiting, retaining and developing talent. We sought to explore how both Government and industry can play their parts in ensuring that advertising is a career that is attractive to the best talent.

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I passionately believe that if we address the issues of trust, inclusion and sustainability, we will be much closer to addressing all the key components required for a workplace that is desirable for the stars we need in our industry.

Alongside the work of our Talent Taskforce, the Advertising Association has been accelerating its workstreams on public trust – with new research released in September, inclusion – with a record 19,000 responses seen in March’s All In Census, and on sustainability – with global expansion from Ad Net Zero, the introduction of science-based targets as mandatory for all supporters, and a second Campaign Ad Net Zero Awards. All with the shared aim of building a better industry for our people.

In tandem, our Policy and Government Affairs team has stepped up its engagement with policy makers ahead of 2024’s likely general elections. Creating a more workable Apprenticeship Scheme, ensuring our country’s digital and data skills needs are met, and leading on AI (Artificial Intelligence) policy are to name but a few of the issues we have discussed with parliamentarians. The Government looks to the advertising industry (and the AA) for leadership – our All In Census beat its own record as the largest industry survey of its kind.

In the summer, I had the privilege of attending Cannes Lions to see the pioneering work of our UK Advertising Exports Group. Through the AA’s role as country rep, I was proud to see the UK maintaining its excellent second place in the ranking for number of Lions won worldwide.

Our creativity is world-renowned, with our latest advertising exports figures showing an astounding 15.5% year-on-year growth to £15.6bn in 2022. We celebrated this and more, including the Chair of the Advertising Association, Annette King, being made a Dame, at the President’s Reception in July.

We also know advertising is a major indicator of economic growth and as the UK economy remained flat this year, so did its adspend while businesses tackled how to manage rising costs and maintain profitability.

It is important to remember that the industry’s best research shows advertising and marketing spend should be seen as an investment, not a cost, and certainly not a budget to cut when times are tough. Studies demonstrate that investing in advertising during a downturn leads to a greater recovery compared to competitors who cut back.

The same can be said about investing in our workforce, whether that is spent on training schemes to upskill existing employees, ensuring workplace inclusion is at the heart of what we do, or finding the right workplace propositions for helping people return to in-person environments following the pandemic. These are all areas where we are trying to help our members with advice, solutions and leveraging the best practices we see in the industry.

Our industry has always been about innovation and I’ve no doubt that AI is going to dramatically change it once again, perhaps in an even more seismic way than the digital transformation seen over the past two decades. To that end, we have established an AI Taskforce, chaired by Google and VCCP, to help understand and prepare for the shifts taking place in our industry. AI will develop with pace – how we use this technology to get the absolute best out of our strategic, creative, and technical talent will be critical as we harness all that it promises.

There are some things however that automation simply cannot replace. It is our people that ensure our many advertising campaigns reflect society with humanity and empathy. In 2023, much of my work was focused on how advertising could help customers respond to the cost-of-living crisis that affected everyone up and down the country, even through to how people could best enjoy Christmas, however limited their budget might be. The latest crop of Christmas ads show once again how advertisers can bring joy to the festive season.

Our people are at the heart of our work. All our efforts must be focused on how we create a workplace where everyone belongs, to ensure our advertising industry powerfully and responsibly reflects and shapes the world around us for the better.

“

It is our people that ensure our many advertising campaigns reflect society with humanity and empathy.

”

23 Stats and Facts for 2023

Responsibility

Our Mission – to be trusted, inclusive and sustainable

£35.6bn

AA/WARC estimates to be spent on UK advertising in 2023

ALL IN

100+ companies are proud All In Champions

14

UK and EU Consultation Responses

FRONT FOOT

95 member organisations

LEAD 2023

Launched our new Talent Report

20

Policy Working Group meetings

LEAD 2023
SCOTLAND

Released our latest Trust research

AD NET ZERO
ALL FOR NONE

Introduced mandatory science-based targets reporting

1,886

Media mentions

£15.6bn

UK advertising service exports in 2022

MediaSmart

Reached 845,000 young people

60+

Events hosted for our members

106

UK wins at Cannes Lions, according to AA data

ADGREEN

Published its first Annual Review

111,175

Visitors to our website

UK
AEG

Hosted 50 companies on a trade mission to Cannes



Introduced its new 'Credos Thinks' series

£9.5bn

Record spend for Christmas advertising season

21

Organisations helped form our new AI Taskforce

19,000

Respondents to the second All In Census

44

News releases and official statements

462

Meetings with our Front Foot community

Our Members

ADVERTISING ASSOCIATION

Alliance of Independent Agencies

AOP

APA

BPMA

CAA

Channel 4

CIM

Clearcast

COBA

DMA

Global

Google

IAB UK

IPA

ISBA

ITV

Meta

MRS

News Media Association

Outsmart

Paramount

Pinterest

PPA

Radiocentre

Royal Mail MarketReach

Sky Media

Snap

Spotify

TikTok

Warner Bros. Discovery

Yahoo!

ADVERTISING ASSOCIATION SCOTLAND

Carat Edinburgh

EssenceMediaCom Scotland

Filming Scotland

Lane Agency

Leith Agency

LS Productions

News Scotland

NCA

Republic of Media

STV

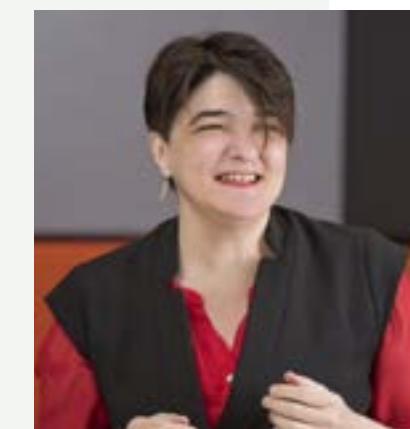
What Our Members Say



“ The advertising industry is a major contributor to the UK economy and a driving force behind its recovery. As such, the Advertising Association’s work to bring the entire industry together is more critical than ever. A clear single voice promoting responsible advertising from our industry to government and policy makers.

KELLY WILLIAMS
Managing Director, Commercial, ITV

”



“ The Ad Association brings the industry together and holds us to the highest standards. This is not only on what we do but how we do it, with world-leading initiatives such as the All In Census, All in Champion programme, and Ad Net Zero. Although Clearcast and the AA have enjoyed a long-standing collaborative relationship, sitting on their council and working alongside them to amplify the need for more accessible advertising this year – we’ve felt how invaluable becoming a member has been. Clearcast is excited about aligning with the AA to support greater future effectiveness and trust in advertising in 2024 and beyond.

SAM SMITH
Managing Director, Clearcast

”



“ The AA does a fantastic and vital job representing the whole advertising industry and their great team applies smart thinking and dedication in doing that. Their expanding remit is important too, particularly for us the UKAEG, which is providing opportunities in other markets for APA members.

STEVE DAVIES
CEO, APA

”

Our Board and Council

ADVERTISING ASSOCIATION BOARD

Jonathan Allan, Channel 4

Paul Bainsfair, IPA

Chris Combemale, DMA

Charlotte Frijns, AA Honorary Treasurer

Kathryn Jacob, CAA

Annette King, AA Chair

Karen Martin, BBH

Sajeeda Merali, PPA

Owen Meredith, NMA

Jon Mew, IAB

Matt Payton, Radiocentre

Phil Smith, ISBA

Richard Warren, Nationwide

Debbie Weinstein, Google

Stephen Woodford, AA CEO

ADVERTISING ASSOCIATION COUNCIL

Jonathan Allan, Channel 4

Brett Aumuller, Sky Media

Paul Bainsfair, IPA

Nick Baughan, Meta

Lord Guy Black, NMA

Alessandra Bellini, AA President

James Best, Credos

Kris Boger, TikTok

Brian Coane, The Leith Agency

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Mike Gordon, Global

Amanda Griffiths, Royal Mail MarketReach

Kathryn Jacob, CAA

Margaret Jobling, NatWest Group

Annette King, AA Chair

Josh Kricheski, IPA President

Tim Lumb, Outsmart

Mark Lund, ASBOF Chair

Stephen Maher, DMA Chair

Steven Mchenry, Yahoo!

Sajeeda Merali, PPA

Owen Meredith, NMA

Jon Mew, IAB

Adam Minns, COBA

Clive Mishon, Alliance of Independent Agencies

Sebastian Munden, Ad Net Zero Chair

Dyana Najdi, Google

Matt Payton, Radiocentre

Milka Privodanova, Pinterest

Richard Reeves, AOP

Matt Salmon, Snap

Mitchell Simmons, Paramount

Phil Smith, ISBA

Sam Smith, Clearcast

Carey Trevill, BPMA

Richard Warren, Nationwide

Stephen Woodford, AA CEO

9 May 2024 | HOME Theatre Manchester

LEAD 2024 NORTH

**ADVERTISING
ASSOCIATION**

Book your LEAD North 2024 tickets now!



10 October 2024 | Glasgow, Scotland

LEAD 2024 SCOTLAND

**ADVERTISING
ASSOCIATION**

Tickets coming soon!

Our Front Foot Network



PETE MARKEY

Chair, Front Foot and CMO, Boots

In 2023, I was delighted to be made Chair of Front Foot, the AA's exclusive member network within our industry, comprising over 90 businesses spanning advertisers, media owners, and agencies. Front Foot builds evidence, drives engagement and advocates advertising's contribution to the economy, to society and to people, and runs a series of impactful events, including Front Foot Insight Sessions and Breakfasts.

Through these engagements, we aim to continue providing valuable insights to our members. In April 2023, our Breakfast with AA/WARC unveiled findings from the 2022 Expenditure Report, setting the tone for informed discussions among our Front Foot members.

Additionally, our ongoing Front Foot Insight Sessions, exemplified by recent roundtables on 'Investing in Our Talent's Future,' 'Tackling the Climate Emergency,' and 'The Cost of Living Crisis,' showcase our commitment to exploring key industry topics and trends. These sessions bring together experts, specialists, and our members in engaging conversations, providing a platform for knowledge exchange.

Front Foot aims to continue to provide insights to members across policy and government affairs ahead of the general election year.

FRONT FOOT MEMBERS

Accenture Song	Clear Channel	Google	Leo Burnett	Ogilvy	Spark Foundry
adam&eveDDB	Creative Equals	Grace Blue	Lloyds	OMD	St Luke's
Alight Media	Dentsu	Group M	M&C Saatchi	Omnicom Media Group	Starcom
Amplifi	Dentsu Creative	Guardian	McCann	Open Media	Talon Outdoor
AMV BBDO	Dentsu X	Havas	McDonalds	Ozone	Tesco
Anomaly	Digital Cinema Media	Havas Media	MediaLink	Pearl & Dean	TFL
Asbof	Daily Mail Group	Hearts & Science	Merkle	Performics	The 7 Stars
Barclays	Drum	Immediate Media	Merkle B2B	PHD	TikTok
BBH	Drummond Central	initiative	Meta	Pinterest	Total Media
BENLabs	E.ON	IPA	MG OMD	Publicis Media	UM
Boots	EssenceMediacom	IPG Mediabrands	Mindshare	Rapport	VCCP
BT	Fuse	iProspect	Mullen Lowe	Royal Mail	Wavemaker
Channel 4	Generation Media	ISBA	Nationwide	Saatchi & Saatchi	Wunderman Thompson
Carat	Gleam Futures	ITV	Neverland	Sky	Yahoo!
Camelot	Global	Kinesso	News UK	Smartly.io	Zenith
Clearcast	Good Loop	Kinetic	Ocean Outdoor	Snap	

FRONT FOOT BOARD

Paul Bainsfair, Director General, IPA

Natalie Bell, CEO, Manning Gottlieb OMD

James Best, Chair, Credos

Matt Bush, SVP Global Agency Partnerships, Smartly.io

Dominic Carter, Group Chief Commercial Officer, News UK

Simon Daglish OBE, Deputy Managing Director, Commercial, ITV

Tammy Einav, Exec Chair, adam&eveDDB

Charlotte Frijns, CFO EMEA, Publicis Media

Sarah Jenkins, Managing Director, Saatchi & Saatchi

Pete Markey, CMO, Boots and Chair, Front Foot

Phil Smith, Director General, ISBA

Karen Stacey, CEO, Digital Cinema Media

Stephen Woodford, CEO, Advertising Association

What Our Members Say



“ To be able to work side by side with the Advertising Association gang driving this incredible industry of ours forward is quite frankly, an honour. As an independent agency with total freedom to build a better creative business, and drive the industry forward in a trail of pink fairy dust as a result, well it's a partnership we couldn't be prouder to enter into. Bring on 2024!

POLLY DEDMAN
Director of Performance at Neverland

”



“ The Advertising Association is a community of the best and brightest minds in the industry, helping to collectively lead the way to a more sustainable, equitable and trusted future for our craft. The AA team work tirelessly to create dynamic and responsible spaces where we can all come together to create real change and raise our game. It is this focus and enthusiasm for our industry that will ensure that future generations see the unique and valuable qualities that media brings to the UK and beyond.

RYAN UHL
Chief Brand Strategy Officer, Mail Metro Media

”



“ The Advertising Association provides a vital and pivotal role, supporting and advising the UK advertising industry. Their knowledge, insight, and passionate drive to consistently champion responsible advertising, ensuring inclusivity, sustainability and trust are at the heart of UK society, is what we as brands find invaluable to the success of our business. I'm really looking forward to further enhancing our partnership into 2024 as we continue to drive forward positive change within the industry.

VICKY HANDLEY
Lloyds Bank Brand Communications Lead

”

Find out more about joining Front Foot by emailing Sharon or Sarah at sharon.lloyd-barnes@adassoc.org.uk and sarah.virani@adassoc.org.uk





Advertising's Contribution to the UK Economy

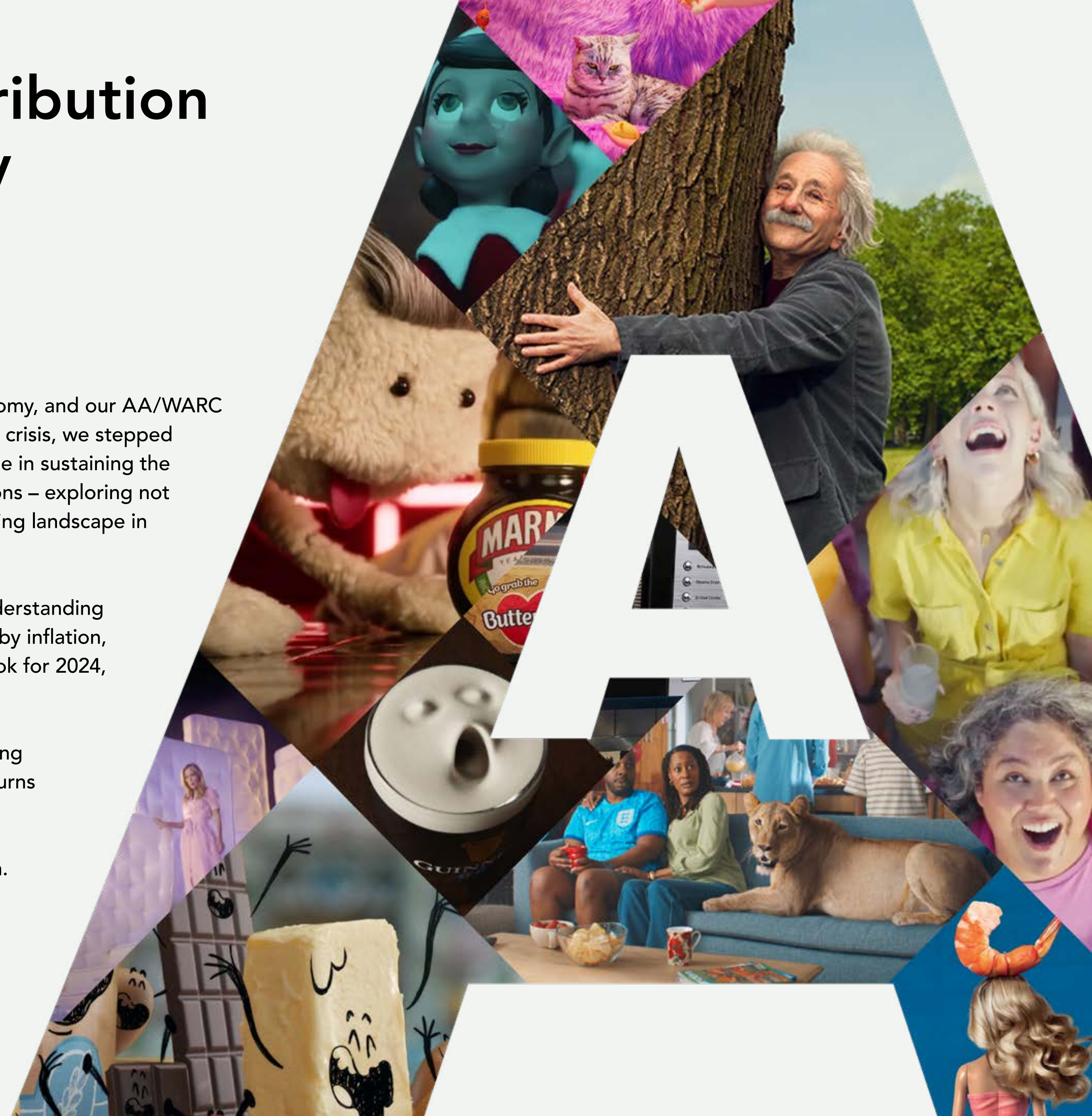
DAME ANNETTE KING

Chair, Advertising Association and Global Lead,
Accenture Song Communications

The advertising industry is often seen as a barometer for the overall health of the economy, and our AA/WARC adspend figures took on greater significance in 2023. Amidst the ongoing cost-of-living crisis, we stepped up our engagement with Government and our members to underscore advertising's role in sustaining the economy. Our think tank, Credos, continued to delve into fundamental industry questions – exploring not only how we foster competition and innovation but also how we navigate an ever-evolving landscape in response to challenges, such as the climate crisis and AI.

Our quarterly AA/WARC expenditure reports remain an indispensable resource for understanding the health of advertising amidst economic headwinds. While media prices are affected by inflation, adspend is projected to grow by 2.6% to £35.6bn in 2023, with a more optimistic outlook for 2024, expecting a 3.9% growth.

In tough economic times, marketing budgets often bear the initial brunt, and our ongoing campaign to showcase the returns for businesses investing in advertising during downturns was substantiated through various initiatives throughout the year. We were pleased to champion the value of advertising both in Parliament – through the activities of the Debating Group – and in the media with our successful Christmas advertising campaign.



Understanding Advertising and its Value

Credos was born more than a decade ago out of the industry's collective desire for rigorous research and insight into some of the industry's most pressing questions, taking on topics such as public trust in advertising, and the economic impact of advertising. Our research since inception has focused on serving the industry wherever possible, while providing analysis of the critical debates.

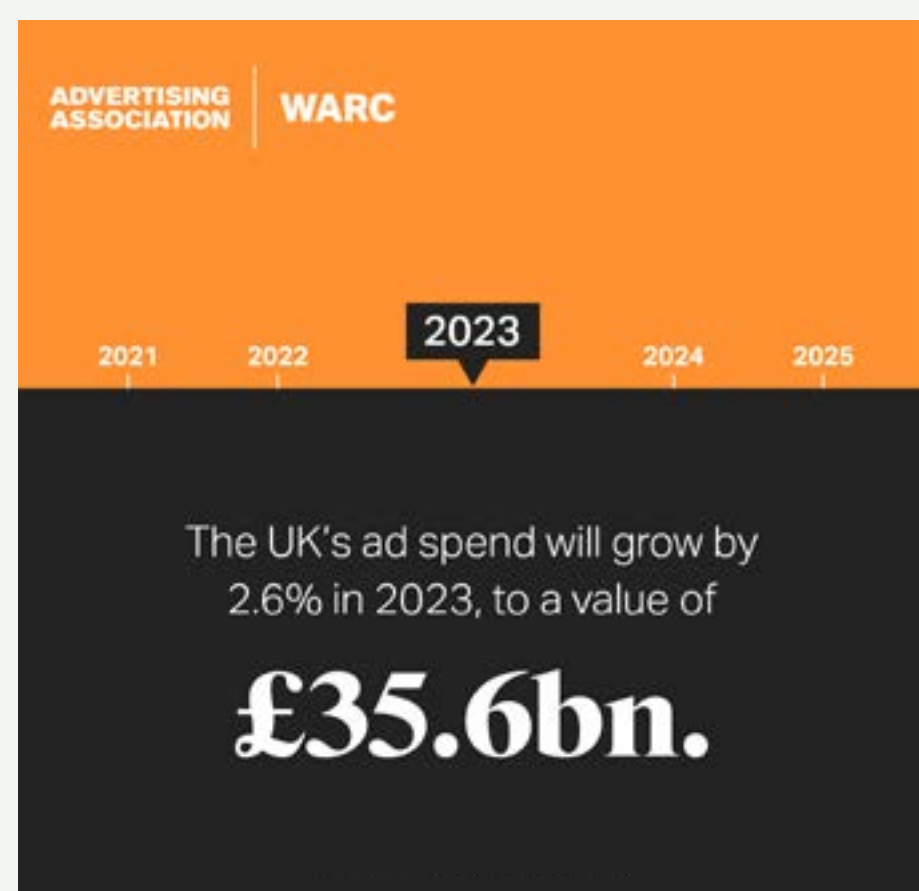
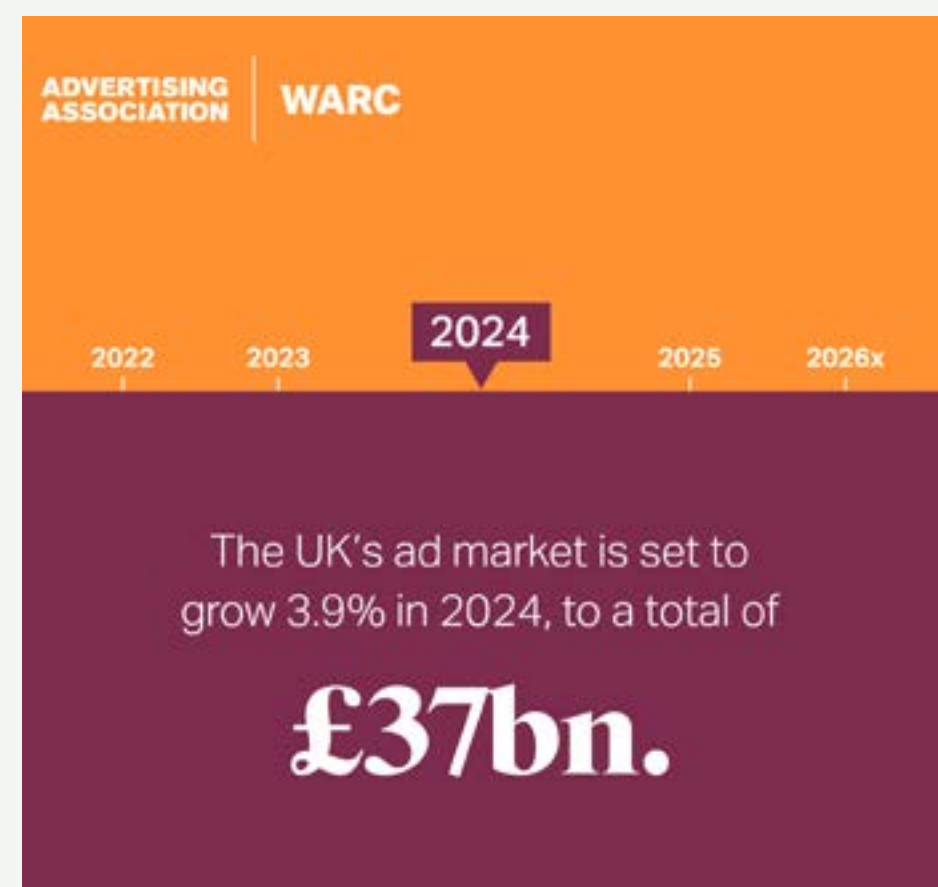
Some of these debates are captured within Credos' Advertising's Big Questions series – editorial pieces commissioned by Credos and written by some of the advertising industry's leading thinkers. The very first of this series was written by the incomparable Jeremy Bullmore who sadly passed away at the start of 2023. His article, titled "What is advertising" became the yardstick by which all future articles would be measured – an unfair assignment for the many accomplished writers who followed in his footsteps.

Since that article, the series has expanded, now featuring pieces such as advertising's effect on market growth and consumer price. Understanding and articulating advertising's real-world impact is something that we must improve as an industry, so as we approach a critical election year, Credos will continue to look at the big questions that our industry is facing and find the right people in our industry to answer them. Reports to look out for in 2024 include a fresh look at the value of trust to our industry, as well as a review of best practice in hybrid working.

Learn more about Credos by visiting our website.



Debating Issues in Parliament



In 2023, our CEO, Stephen Woodford, continued his role as the chair of the Debating Group – an organisation of trade bodies committed to debating critical issues affecting the advertising and marketing industry. A series of debates was held in the House of Commons, covering a broad spectrum of key topics, from the opportunities and potential threats of Artificial Intelligence to the value of promotional merchandise.

We were particularly pleased to sponsor a debate alongside the International Advertising Association on whether a strong advertising industry is crucial to restoring the UK economy to good health. Our Front Foot members, Tammy Einav from adam&eveDDB and Dom Carter at The Sun, presented their best case for the value of advertising under the watchful chairmanship of Damian Collins OBE MP. The debate showcased our top research, from Credos' invaluable Advertising Pays Reports to our latest AA/WARC advertising spend data, in a House of Commons Committee Room.

Throughout the year, other Debating Group events aimed to demonstrate advertising's contribution to a robust economy. These included a parliamentary reception hosted by Tulip Siddiq MP and an annual cross-party dinner with Daniel Zeichner MP, Sir Bill Cash MP, and Lord Duncan of Springbank.

As we approach the next general election, we look forward to continuing to use the Debating Group forum to address the issues that most significantly impact our industry through meaningful debate.

Keep up with the latest debates by following the dedicated group on LinkedIn.



Celebrating Christmas Advertising

Our AA/WARC advertising spend figures predicted that £9.5bn was forecast to be spent in the 'golden quarter', marking a 4.8% rise from 2022's record £9bn spend. In a landscape where four out of every five pounds are now spent on online advertising, we spoke about the importance of advertising to businesses, large and small, in reaching customers up and down the country. TV advertising remains important too, with AA/WARC predictions showing £1.5bn spend for the quarter, as brands unveiled blockbuster Christmas ads that often go on to win awards.

We commissioned new research which showed:

- The majority (59%) of people find that Christmas ads set the mood for the festive season, with nearly 70% of young adults finding Christmas ads to be the ultimate festive mood booster.
- Nearly half (48%) of all adults credit Christmas ads with helping to spark gift ideas.

We hit the headlines:

- Our Commercial Director, Sharon Lloyd Barnes, and Communications Director, Matt Bourn, featured on 25 different TV and radio stations, including BBC Breakfast, Times Radio, BBC Radio 5 Live, GB News and 17 regional BBC radio stations.
- National titles including PA Media, The Guardian, BBC Online, and Evening Standard featured our story, provoking further commentary from the likes of The Times and The Independent as the festive advertising season continued.



At the time of writing, our Christmas campaign reached:

1.27bn

potential editorial reach.

419

mentions across media.

45%

of all adults credit Christmas adverts with sparking gift ideas.

A

ADVERTISING ASSOCIATION



£9.5bn

is to be spent during Christmas Advertising season. A record breaking amount.

A

ADVERTISING ASSOCIATION

WARC



70%

of young adults say Christmas ads are a go-to way to get into the festive mood

A

ADVERTISING ASSOCIATION





Engaging with Government and Policy Makers

LISA HAYLEY-JONES

Director of Policy and Government Affairs, Advertising Association

I was delighted to join the AA as Director of Policy and Government Affairs mid-way through 2023 with a mandate to turbo charge our political engagement as we head into a bumper election year.

2023 has been an economic and politically challenging year with a cost-of-living crisis dominating the headlines, record by-election losses for the government, a new First Minister in Holyrood and a second conflict in the Middle East. The pending general election has cast its shadow over the political landscape as politicians and policy makers head into the final parliament of this session. It's been more important than ever to increase our engagement across all the political parties and ensure the voice of our industry is heard by ministers, shadow ministers and policy makers in the UK regions, Westminster, Holyrood and our European colleagues in Brussels.

As we head into election year with a potential change of government on the cards we will continue to be at the heart of political and policy debate representing our industry and highlighting the enormous contribution we make to the economy. Whatever happens politically we will be ready to work with any government.

Connecting with Westminster

During 2023 the AA hosted flagship events at the Conservative conference in Manchester and the Labour conference in Liverpool, with DCMS Minister Rt Hon John Whittingdale MP and Shadow Minister for the Creative Industries and Digital Sir Chris Bryant MP.

We also held our Parliamentary Reception at the House of Commons and hosted Westminster dinners for parliamentarians to talk with AA members and take MPs on a tour of 'Adland' to gain an insight into our industry.





Engaging with Scotland's Parliamentarians

Our year in Scotland began where we had left it in 2022 – responding to the Scottish Government's proposals to ban all forms of marketing and advertising for alcohol products.

Working closely with AA Scotland members, we joined fellow Scottish industries including representatives for alcohol producers, tourism, hospitality, retail, sports and culture to put forward a strong cross-sector response. This highlighted the deeply flawed evidence base that the consultation relied upon, as well as the significant negative impact that such proposals would have on Scotland's economy and international reputation. The work included bringing together representatives from across the advertising landscape at a roundtable with the then-minister for alcohol policy, Maree Todd MSP.

Following the announcement by the new First Minister, Humza Yousaf MSP, that he would "go back to the drawing board" on the proposals, we have increased our engagement with the Scottish Government at both ministerial and official level. This included meetings with business and public health ministers at the SNP Conference in Aberdeen, and senior officials in Edinburgh. We will continue to put forward a strong case for the sector ahead of an expected re-run of the consultation in early 2024.



CHRIS WALKER
Head of Policy and Government Affairs,
Advertising Association

Away from alcohol we had strong cross-party representation at LEAD Scotland with speakers from the SNP, Labour, and Conservatives. While the panel reflected on the strength of Scotland's creative industries, the discussion did highlight the lack of specific plans by any party for our sector. A key focus of our engagement in 2024 will therefore be to improve Holyrood's understanding advertising and the type of backing it needs ahead of the Scottish elections expected in 2026.



Sharon Lloyd Barnes presenting at the LEAD Scotland 2023 event.

The Gambling White Paper

The Government's long-expected Gambling White Paper was published in April. Although there was much speculation about a possible clampdown on advertising, ultimately the recommendations which did address our sector were minimal and relatively light-touch.

The Review itself was well received across Parliament and industry. On issues which did affect advertising – such as the proposal for the Government to replace existing industry-owned messaging around safer gambling – we continued to engage with officials in the relevant departments.

An Evolving Public Health Story

High Fat, Salt and Sugar (HFSS) advertising – now known as 'Less Healthy Foods' (LHF) – continued to dominate the conversation for our Food Working Group. The restrictions were delayed from being introduced at the beginning of the year and so Q1 was instead marked by several consultations on the makeup of the new restrictions.

We made good headway in our engagement with Government in relevant departments and have worked closely with the Labour Shadow DCMS team to ensure they are aware of our arguments and concerns. We were invited to attend a health symposium hosted by Kim Leadbeater MP in the autumn where industry, health NGOs, academics, and senior politicians including Wes Streeting MP and Anneliese Dodds MP were invited to give their perspectives on healthy food and obesity.

This year saw HFSS move from being a political football to a more technical discussion. With all three parties in favour of the 2025 restrictions, we will continue to push for guidance and a timetable which enables industry to properly understand, incorporate, and implement the restrictions. At time of writing, we are planning our response to the ASA/CAP consultation on issues including the so-called 'brand exemption' – a crucial issue which will enable advertisers to continue to promote their brand and non-LHF and reformulated products.





Shaping the Responsible Use of AI in Advertising

KONRAD SHEK

Director of Policy Research, Advertising Association

Artificial Intelligence (AI) continues to develop rapidly and there has been an explosion of interest in Large Language Models (LLMs), and Generative AI more generally, ever since ChatGPT was launched at the end of 2022.

This prompted us to think more strategically about how, as a trade association, we could best contribute to the conversation, add value to our members, but also leverage the breadth and depth of expertise across the membership. This culminated into the launch of our AI Taskforce in September which brought together senior representatives with a mix of technical, policy and legal expertise from across Advertising Association and Front Foot membership, co-chaired by representatives from Google and advertising agency VCCP.

The Taskforce has agreed to build a coordinated policy approach, in recognition of the rapid need to establish ethical safeguards, develop industry guidelines and work with the Advertising Standards Authority (ASA) where appropriate to ensure the use of AI in advertising campaigns is transparent and legal, decent, honest, and truthful.

The first big challenge is how to position the UK as the global leader and champion for AI in advertising and marketing, especially when there are other countries who are vying to do the same. This is where we think the Taskforce has a role in recommending policy that facilitates the development of AI in advertising and marketing, helping Government develop the right narratives and curating a set of best use cases to show how AI has been deployed effectively.

The second big challenge concerns advertising practitioners themselves trying to work out what AI is acceptable for and what it is not. Again, the Taskforce has a role here to help define those industry standards so that practitioners can use AI with increased confidence and clarity from both a legal and ethical standpoint.

Have some thoughts on AI? Email aitaskforce@adassoc.org.uk to contribute to the AI Taskforce.



VCCP has been harnessing the use of AI in its Virgin Media ad

A Co-ordinated Approach to Data Protection

We have been coordinating with members, including through our Data Steering Group and membership of the Ministerial-level Business Advisory Group, to engage with policy makers and secure our priority amendments to the Data Protection and Digital Information (DPDI) Bill as it makes its passage through Parliament.

We have broadly welcomed the Bill, including the guarantees made by Government that the Bill will maintain EU data adequacy. However, we have been working closely with members to secure concessions on areas such as legitimate interests, market research and cookies. As the Bill moves to the Lords, we will seek support from a cross-party group of Peers to push forward our remaining amendments.

The Data Steering Group continues to be a key workstream for us given its importance to data-driven advertising and marketing. The areas of focus for the group over 2023 have included the design and implementation of the UK's National Data Strategy, the DPDI Bill, and data ethics.

Securing Support for the Skills our Industry Needs

Skills and Talent remain the lifeblood of our industry, with the publication of *Investing In Our Talent's Future* by Credos earlier this year setting the agenda for our engagement with Government.

In our parliamentary engagement, we've focused on reforms to the apprenticeship levy to improve uptake in the industry, raising this in bi-lateral meetings with the Secretary of State, Lucy Frazer. The Policy and Government Affairs team also attended the Government's flagship summit on skills, the inaugural Skills for Growth Conference where we directly raised the importance of funding for creative skills with the Chancellor of the Exchequer, Jeremy Hunt. We were pleased to see Labour's announcement of a growth and skills levy, which addresses a number of the sector's concerns, by providing flexibility for firms to use up to half of their total levy contributions on non-apprenticeship training.



WILL LANE
Policy and Government Affairs Manager,
Advertising Association

Developments in the Online Advertising Programme

Through the Online Advertising Programme, the Department for Culture, Media & Sport (DCMS) has been examining whether the current self-regulatory regime for paid-for online advertising is sufficiently equipped to tackle current day challenges.

Whilst DCMS remain committed to developing and consulting on proposals for regulation ahead of future legislation, it set up the Online Advertising Taskforce in July to drive non-legislative action as a precursor to this. The Taskforce is co-chaired by DCMS Minister Sir John Whittingdale OBE and Mark Lund OBE, chair of asbof & basbof. Its membership consists of the ASA, IAB, IPA, ISBA, NMA and the AA, among others.

A broad agreement was reached on the commitments included in the DCMS draft action plan at the last Taskforce meeting that took place on 25 October, where Minister Whittingdale said he valued the contributions of the Taskforce participants and was pleased with the outcome of the meeting.

DCMS published the action plan on 30 November whose key objectives are to combat illegal advertising and increase the protections for children. The plan consists of a mixture of Government and industry-led actions, with most of the industry actions consisting of facilitating takedowns, highlighting existing industry initiatives, and increasing transparency through data sharing. The Government is also considering making amendments to the Consumer Protection Regulations through primary legislation to support this work.

Following the agreement on the action plan there is now a need to progress the key strands of the activity. This will mean adding more detail on precise objectives and methodologies to achieve those aims. It is expected that this will be delivered over the coming weeks via specialised working groups and working with industry leaders.

We expect DCMS to publish another consultation in Q1 2024 to seek views on proposed legislation.



Engaging with Europe and our Advertising Information Group (AIG)



2023 has been a critical year for the EU given the pressure to complete its policy agenda before the 2024 European elections, after which the current Commission's mandate will end. Throughout the year, we convened regular AIG meetings with our German and Austrian counterparts and several Brussels-based trade associations to discuss EU policy issues impacting the advertising and marketing industry. Of highlight was the policy development and advocacy we conducted on political advertising, AI Act, Green Claims Directive, Empowering Consumers in the Green Transition and alcohol advertising. We continue to monitor developments around the draft European Media Freedom Act. However, negotiations on the draft e-Privacy Regulation have stalled and it is unlikely to survive in its current form.

Our commitment to self-regulation beyond the UK remains strong. Via AIG, we also sit on the Board and Executive Committee of the European Advertising Standards Alliance (EASA) – the voice of advertising self-regulation issues across Europe and the focal and coordinating point for European national self-regulatory organisations such as the ASA and Clearcast. At the last EASA Executive Committee meeting in November, members heard from the Ukrainian Marketing Association, about horrific and sad tales of life and survival in Ukraine today.

In April, we joined the EASA Biannual meeting in Istanbul which dovetailed with the World Federation of Advertisers' (WFA) Global Marketeers conference. And in October, the autumn meeting took place in Athens and discussions centred on influencer marketing and responsible advertising.

In November, AIG attended the European Interactive Digital Advertising Alliance (EDAA) annual summit in Brussels which was their key launch platform for its new Advanced Advertising Transparency Programme (AATP) which leverages the "AdChoices" Icon and new technical standard currently being produced by the IAB Europe and IAB Tech Lab that mirror the obligations set out in Europe's Digital Services Act.

As we enter 2024, we will continue to follow policy developments closely on behalf of our members.



Educating Young People about Advertising

RACHEL BARBER-MACK
Executive Director, Media Smart

I believe that Media Smart has never been more relevant, and that there has never been a more pressing time to invest in media literacy for young people. This is a shared responsibility for us all in the advertising and media industry, way beyond our current 35 supporting partners.

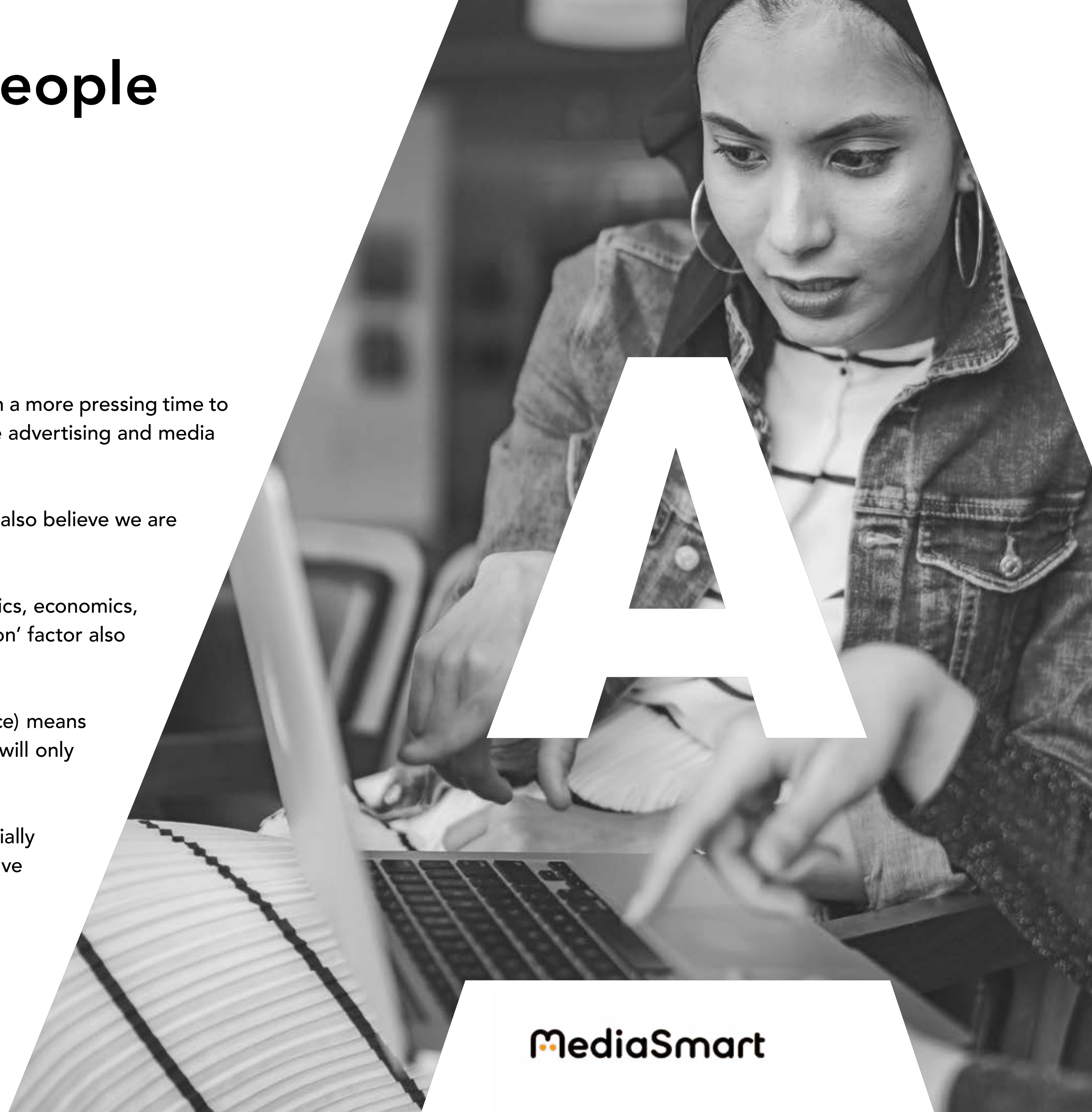
Media Smart has made enormous strides – with measurable impact – in this area, but I also believe we are just scratching the surface.

Gen Z is being faced with faster, and more radical developments in areas such as politics, economics, societal change, technology, ethics, and the environment, and this ‘speed and revolution’ factor also applies to their media consumption.

The ever-changing landscape (compounded by their embracing of Artificial Intelligence) means we need to move quicker, and more responsively to keep up, because treading water will only result in us going backwards.

We know the Government has scrutinised online advertising – and online harms (especially those directed to under-18s) – and it is critically important that we all, maintain an effective leadership stance, both in terms of thought and action.

Public trust in advertising is built on the foundation of self-regulation and, I believe, is made even stronger with education which is why we must increase, the funding and support of media literacy for our young people because it works.



MediaSmart

Our Work in 2023

Media Smart has a clear mission: *To equip young people with the skills and attributes to navigate media literacy today, for better employability, well-being, and citizenship tomorrow.*

It is the UK's award-winning, educational non-profit organisation, focused on helping 7-18-year-olds confidently navigate the media and advertising they consume. It does this through the creation of free teaching resources, parent guides and online awareness campaigns direct to young people.

Here are some key takeaways about Media Smart's work through 2023 and its plans for 2024:

1 – Building our Careers Workstream

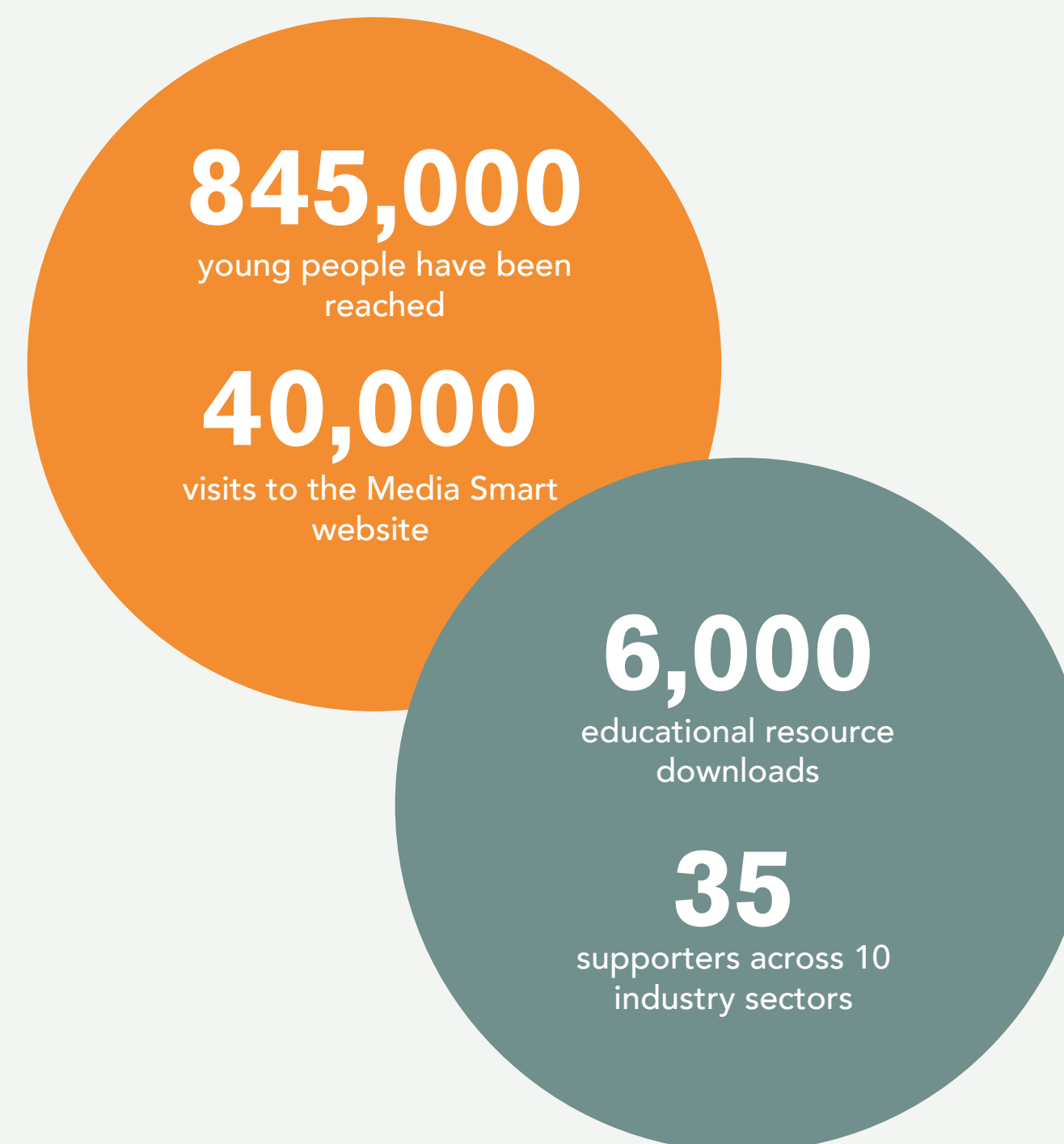
In partnership with OMG UK, Media Smart has developed a suite of resources to educate 14+-year-olds about how advertising and the media works, and possible career opportunities open to them within the industry.

In spring 2023, we carried out a three-workshop format pilot with Livity, across a selection of London schools, working with Careers Hub. Since then, we've taken on board all feedback to inform a new condensed one-session, 'plug & play' offering.

Rollout will start in early 2024 – following recruitment of OMG UK staff, and their relevant training – with school outreach beginning in London and Manchester, and workshop content being loaded to the Media Smart, TES and IPA websites. From March 2024 onwards, we will then run the sessions – engaging local MPs, gathering testimonials, and presenting to the IPA Council... with a vision to recruit more advertising and media agencies to support the initiative, and thereby enabling rollout to more UK cities.

2 – An Evolution for our Website

As well as instigating an evolution of Media Smart's mission to inspire young people into the working world of advertising and media, we have also added new sections which describe career opportunities and signposts to external pathways and acts as a hub for industry initiatives in this space.



3 – Tackling Scam Advertising

During 2023, we started planning for an initiative supporting the Advertising Association's Trust efforts to raise awareness amongst 13-18-year-olds of online scams, and educating them about how to navigate online fraud safely.

Working with Livity on this campaign, we will target young people in the places they hang out online (enabled by our digital and platform supporters) as well as through a more traditional teaching resource for schools.

We are looking forward to launching this in February 2024, and we are working closely with the Home Office's Fraud Policy Unit, to ensure maximum reach and impact.

4 – Helping Young People Understand Environmental Claims

One of Media Smart's goals in 2023 was to raise awareness of greenwashing and support the fantastic work the Advertising Standards Authority (ASA) is doing in this area.

Following research which shows 52% of teenagers are concerned about the lack of action on climate change, in early 2023, we launched a campaign to help young people understand the regulation around environmental claims in advertising and marketing, alongside a simple five-point guide and short film.

So far, Media Smart's campaign has reached and engaged 14,000 young people with these messages and CTAs.

Finally, an enormous thank you to all Media Smart's supporters

adam&eveDDB
Advertising Association
ASA
Asbof
Boots
British Toy & Hobby Association
Channel 4
DCMS
European Interactive Digital Advertising Alliance (EDAA)
Ferrero
First News
Generation Media
Giraffe Insights

Google
Government Equalities Office
IAB UK
The Industry Trust
Influencer Marketing Trade Body
Intellectual Property Office
IPA
ISBA
ITV
Livity
L'Oréal UK & Ireland
McCann Worldgroup
Meta
MPA

OMG UK
Pearl and Dean
Plans with Purpose
Rocket
Sky
SuperAwesome
TikTok
Twitch



Visit Media Smart's website to download their latest resources.



I home educate my two children and I have just spent some time looking through all your teaching resources. You have provided such brilliant, comprehensive, and engaging materials...I just wanted to express my gratitude for all the time and effort that went into making and sharing these resources.

KATE DIAMOND
Home Schooling Parent



We regulate UK ads, wherever you see or hear them.

Because we, too, are by your side.

A



Rebuilding Public Trust in UK Advertising

JAMES BEST
Chair, Credos

Credos has always sought to understand public sentiment towards advertising, and trust is a key element. It matters, with its value to our industry summarised in the three Rs: Results, Regulation and Recruitment.

Results - trust in brands and trust in advertising media increases effectiveness, market share and brand value.

Regulation - politicians and policy makers are more likely to impose regulation on an industry deemed untrustworthy.

Recruitment - trust in our business, its values, and ways of working, is key to attracting and retaining the best and brightest talent to work in advertising.

We began the work to help the industry rebuild public trust in advertising back in 2018.

More than five years on, the work continues. We know more than ever about what levers to pull in the efforts to ensure the public has trust in the work of our industry.

Every organisation in our industry has a role to play in ensuring our work can be trusted, and share in all of the benefits that trust brings.

Our Trust Programme

At LEAD Scotland in September, the latest Credos report 'What Drives the Public's Trust in Advertising' revealed that the UK public's advertising experience is integral to trust. Creative quality of advertising remains the top trust driver, while ad bombardment is the most damaging.

Informed by our pioneering research, our mission to rebuild public trust in advertising is one of the most crucial issues we face, and we are committed to working with our members and peers on a system change that will help rebuild its decline.

As our CEO, Stephen Woodford, said: "Understanding the drivers of public trust in advertising underpins the industry's work to sustain and grow this trust. It is the top priority for the AA's membership and is at the core of our work."

The Trust Working Group, led by co-chairs Phil Smith (ISBA) and Paul Bainsfair (IPA), now comprises representatives from the AA, AOP, ASA, Asbof, Credos, DMA, IAB, IMTB, ITV, Meta, NMA, OMG, PPA, Pinterest, Royal Mail, TikTok and Yahoo.

As a group, we are mapping what regulation, policy or member initiatives exist to address these drivers. This will help us discuss and create an overview of all the industry and regulatory initiatives in place or in planning that could impact these Trust drivers and build value through the three Rs.

If you'd like to book a Trust presentation, reach out to Sharon at sharon.lloyd-barnes@adassoc.org.uk



Raising Awareness of the ASA

One of the most powerful levers we have to help build trust is public awareness of the industry's regulator. We have seen how the Advertising Standards Authority's (ASA) ad campaign can boost trust in advertising.

Thank you to all the brands, media owners and partner agencies, EssenceMediacom and The Leith Agency, for their support. The ASA advertising campaign results, revealed at a virtual event in May, show that relevant action can make a difference, with those aware of the ASA's comprehensive regulation of advertising content via this campaign having a 50% higher level of trust than those unaware of it. A new campaign ran from October to December 2023 and we will continue to raise awareness in 2024.

Join us at LEAD 2024 where we will reveal the results of the latest ASA campaign and discuss the ASA's five-year plan which will continue to impact Trust in our industry.

Tackling Suspicious Advertising

The AA convened a working group to consider the issues on suspicious advertising that also arose from the Credos drivers of Trust research. Chaired by Christie Dennehy-Neil (IAB), the group considered a gap analysis, looking at what we could do in addition to what was already being done by industry, or through regulation.

Actions included:

- A Media Smart awareness campaign through social media about scam advertising aimed at 18–25-year-olds, which will launch in 2024.
- Raising industry awareness of best practice in influencer marketing compliance. A Front Foot Insights session was hosted in partnership with ISBA and the IMTB in June to help promote ISBA's Code of Conduct for Influencers.

The Power of Creativity

We know that creativity is the number one positive driver of Trust and that's why, in 2021, we launched a partnership with Kantar and Marketing Week called 'The Works'. Through monthly featured articles, 'The Works' celebrates the advertising campaigns that generate the most positive public response and shares what marketers can learn from them.

In February we hosted a virtual breakfast event led by Lynne Deason, Head of Creative Excellence, Kantar, aimed at companies who wanted to gain insights into what drives a successful campaign. The session brought to life what it takes to succeed using examples of top-performing ads from The Works.

Creative effectiveness is the second most important factor after brand size in determining the profitability of advertising investment. At a time when brands are under pressure due to the cost-of-living crisis, making the most of every opportunity to positively engage with consumers in a way that differentiates brands from others has become even more important.

Interested in knowing more? Delve into the latest examples from The Works on our hub.



Legoland created the most effective TV ad of April with 'In My LEGOLAND'



UK Advertising's Success on the World Stage

AISLING CONLON

Director of International Trade, Advertising Association

The advertising industry is no longer commercials and banners; it includes events, ad-funded programmes, sports sponsorship, influencer marketing, and more, valued globally at \$250 billion by Goldman Sachs. The UK, ranking as the third-largest advertising market in the world, displayed a 15.5% year-on-year increase in UK advertising exports, reaching a ground-breaking £15.6 billion in 2022. This not only solidifies the industry's standing as a global powerhouse but also highlights how it is a crucial part of achieving the Government's export target of £1 trillion by 2030.

The industry's exports have doubled in just six years from £7.1 billion to £15.6 billion in 2022, helped by the growing engagement of UK advertising and market research companies in international activities. In 2020, our industry came together and launched the UK Advertising Exports Group (UKAEG), backed by support from the Advertising Association, APA, BPMA, IPA, and the Department for Business & Trade.

UKAEG is a programme that allows industry and Government to work together. At the heart of our mission is the commitment to promote the UK as a global hub for advertising excellence, effectiveness, and innovation by driving growth and expanding our global reach. We do this through global trade missions, PR, research, and consultancy with UK Government.



Our Work in 2023

Significant Moments for UKAEG this year include:

Our UKAEG trade missions provide UK advertising companies with opportunities to explore and enter new international markets. Targeting countries or regions with significant growth potential has allowed our industry to highlight its expertise on a global stage. UKAEG has facilitated collaborative opportunities between UK advertising companies and prospective international customers and key stakeholders. Networking sessions and roundtables allowed for the exchange of ideas, fostering partnerships that contribute to the growth and development of the global advertising industry.

UKAEG made a real impact at SXSW 2023 at UK House, with a bootcamp that delivered 30 official talks, 93 speakers and a roundtable with US stakeholders. At Cannes Lions, UKAEG orchestrated a triumphant initiative, including the GREAT global dinner; a roundtable in partnership with Campaign; 24 presentations, including five roundtables with key markets such as the US, MENA, India, and Japan which connected UKAEG members with global guests.

Meanwhile, UKAEG's strategic presence at Advertising Week NYC, resulted in two companies requiring offices in the United States, highlighting the impactful global outreach. Lastly, UKAEG hosted the inaugural UK & China Advertising Summit in London and Manchester to facilitate collaboration between the Shanghai International Advertising Festival and UKAEG members. This has set the stage for mutual success in China for 2024.

If you'd like to join UKAEG reach out to Aisling at aisling.conlon@adassoc.org.uk



Networking Lunch at the inaugural China and UK Advertising Summit



UK Advertising Panel at Cannes Lions with St. Luke's, Digital Voices, and TikTok

Raising the Profile of our Members

In 2023, we were delighted to announce Julian Douglas, International CEO & Vice Chair of VCCP, as Chair of UKAEG. In this capacity, he will champion the interests of our sector in matters related to exports. As the group sets its sights on unlocking new markets, we proudly introduced 25 export ambassadors. We created engaging social content for each ambassador during International Trade Week, amplifying their impact and reinforcing our commitment to advancing the global reach and influence of our members.

Delivering New Research

UKAEG and Credos published two research reports in 2023. The first, released in March, provided valuable insights into the industry's expansive reach and impact. Building on this foundation, our second research piece in November confirmed record-breaking export figures for 2022, an impressive £15.6 billion. Research is integral to our ongoing discussions with the Government; a powerful tool as we advocate for increased support and funding. Armed with this compelling data, we continue to "bang the drum" for the industry, highlighting its pivotal role as a global hub.

Representing UK Advertising to Government

UKAEG acted as an advocate for the UK advertising industry in 2023 through its contributions as a member of the Creative Industries Trade and Investment Board.

UKAEG also curated a roundtable discussion with the Department for Business and Trade – an exclusive session designed as a forum for exploration of the global challenges and untapped opportunities for UK advertising. With the participation of industry representatives and key government stakeholders, the exchange of insights and perspectives not only shed light on challenges hindering global growth but also revealed potential opportunities. This collaborative initiative exemplifies the UKAEG's proactive commitment to nurturing a supportive environment for its members.

Our UKAEG Members

23red, part of Capgemini Invent
 adam&eveDDB
 Anything is Possible
 Ardmore advertising
 Bad Star Studios
 BBD Perfect Storm
 Billion Dollar Boy
 BrandFuel
 Born Social
 Chrome Productions
 Coffee & TV
 Cream UK
 Creature London
 Croud

Crowd
 CUBE Studios
 Draw & Code
 Experience 12
 Fold7
 Four Communications
 Freedman International
 Good-Loop
 Hey Human
 Ignis
 Kairos Group
 Locate Productions
 LONDON Advertising
 LS Productions

MBAstack
 McCann London
 MDRxTech
 Mullen Lowe Group
 NCA
 Nutshell Creative
 St. Luke's
 Talent Republic
 Talon Group
 The network one group
 Umbrella
 VCCP
 Viral Talent

UKAEG is supported by AA, APA, BPMA, IPA and DBT

If you're curious to know more about UKAEG's work, visit their dedicated website.



UK House @ SXSW Panel with VCCP, Alliance Studios, ESPAT TV, SypherPK, and WIRED



The UK Roars at Cannes Lions

The Advertising Association is proud to be the UK rep for Cannes Lions and our team headed down on the train once more to the south of France in June to fly the flag for Team GB at the International Festival of Creativity.

It was a busy week with a packed programme of events from UKAEG, multiple activities with international partners, while our climate action initiative, Ad Net Zero, featured in a special sustainability zone within the Palais.

In addition, we delivered a campaign, alongside our partners Department for Business and Trade, BENlabs, Clear Channel and TikTok, which ensure that UK advertising could truly 'roar'.

It was a successful week on the awards stage for team UK, capturing an impressive 106 LIONS in total, according to AA data. This haul ensured the UK remained in the top three most awarded countries in the world, making the UK Europe's leading territory and the second highest performance globally, behind the United States and followed by Brazil.

If you would like to catch a glimpse of what it was like at the world's biggest festival of creativity, we wrapped this all up with a special promotional video, available on our YouTube channel.

Watch UK Advertising at Cannes on our Youtube Channel.



106

Lions won by the UK, according to AA data

34

Inspiring speakers from the UK speaking at the Palais



4

Jury chairs from the United Kingdom

12

Young Lions were from the United Kingdom



UK

remained within the top three most awarded countries in the world

33

judges from the United Kingdom



Taking Pride in our Young Lions

As part of our ongoing role as UK Representative for Cannes Lions, we ran our UK Young Lions Competitions in March, which saw over 250 teams compete to have the chance to take part in the Global Young Lions Competitions in Cannes.

This year's brief was focused on our Talent workstream, and we asked teams to develop an advertising campaign to encourage young people to choose a career in advertising and make the industry an attractive choice to people at any stage of their career. The entries were then judged by a cohort of over 200 industry experts. The standard for this year's competition was extremely high and some excellent work was produced.

We were immensely proud of our UK teams this year in the Global Competition at Cannes - our Digital team was shortlisted, while our Print team, Marion Miranda and Joe Sayer from the Leith Agency, went on to win Gold.

In November we held a special 'How to Win at Cannes Lions' event at the Regent Street Cinema. This was an opportunity to hear fascinating insights from Lions jurors into what happens inside the judging room, key stats on how the UK performed this year and feedback from some of the companies who took part in our UK Advertising Trade Mission.



PHOEBE SALLITT
Events Manager,
Advertising Association



The UK winning entry for the Young Lions Print Competition



“

It's impossible not to be inspired when you go to Cannes. You're surrounded by amazing work and talented people wherever you go. Winning gold meant we got to get up on stage with industry giants which was pretty special. We look forward to going again next year and seeing where this win takes us in our careers.

MARION MIRANDA
Leith Agency

”



#UKatCannesLions 

HOW TO WIN AT CANNES LIONS INSIDE THE CANNES LIONS JUDGING ROOM

			
MAISIE MCCABE Campaign	ENYI NWOSU UM London	ANN WIXLEY Wavemaker	ROBERT DOUBAL McCann London





Building a More Sustainable Advertising Industry

MATT BOURN
Communications Director, Advertising Association

2023 has been the hottest year on record. If you follow the news, you will have seen worldwide warning signs – temperature highs, flooding, damaging winds, freak hailstorms, fires tearing through southern Europe’s usual holiday destinations across the summer and the West Coast of the US. ‘Extreme weather’ is now part of the lexicon and barely a day goes past without some kind of news story recording another ‘extreme weather’ event.

The advertising industry is operating right at the heart of the debate about what needs to be done, experiencing the urgency of demands for action, and seeing a growing number of briefs to help address the challenge of shifting the behaviours of millions and millions of people. The industry, which is essentially a service industry to all parts of our economy, supporting businesses to compete, innovate and support jobs, is tasked with a new brief – to help us all move on from an economy built through an industrial revolution powered by fossil fuels to one that is fully sustainable, run with renewable energy, and providing people with products and services they want and need that are efficient, not wasteful, use of the planet’s resources.

There is no greater challenge facing our industry than meeting this brief in the coming months and years.

AD NET ZERO
TRAINING

Taking Positive Climate Action

There were numerous key moments this year in our Climate Action workstream. Ad Net Zero continued to grow, with more supporters in the UK and Ireland, a US chapter launched in February led by Ad Net Zero US Director, John Osborn, another chapter launching during the summer from New Zealand and more chapters on the way, all backed by a growing group of global commercial organisations working alongside the world's most influential trade associations.

2023 saw the publication of AdGreen's first annual review (with a follow-up six months later) demonstrating the power of data to help inform decisions in the production process to dramatically reduce the carbon impact from the making of an ad, as well as the formation of a partnership between Ad Net Zero, the WFA (World Federation of Advertisers) and GARM (Global Alliance for Responsible Media) to establish a global data framework for all media planning calculators. The Ad Net Zero team delivered a 5-day long exhibition to Cannes Lions delegates, where the initiative introduced the setting and reporting of science-based targets as mandatory for all supporters and published the first analysis of the industry's path to net zero. Later in the year, Ad Net Zero published its first annual report with a more detailed analysis of supporters' commitments, highlighting the progress being made and the opportunities to move even faster. Its publication was book-ended by in-person events in New York and London.

This was also the year when we, the Advertising Association, were commissioned by independent book publishers, Kogan Page, to write the textbook on how our industry moves to a sustainable footing, not just in the UK but globally. *Sustainable Advertising: How advertising can support a better future*, will be published in March 2024 and covers everything from the important scientific terms, to what the industry needs to do across its operations, production and distribution, the importance of avoiding greenwashing but similarly the vital importance of supporting a liveable future through the promotion of more sustainable products, services and lifestyles. Co-authored by the AA's Director of Communications, Matt Bourn and Ad Net Zero Chair, Sebastian Munden, the book aims through its manifesto to inspire all advertising professionals to help accelerate the industry's change to one that is entirely dedicated to supporting a sustainable life on this planet.

The Ad Net Zero action plan continues to be cited as a clear, useful template for every business operating in the advertising eco-system to adopt and implement, a guide for what needs to be done, and what should be asked of other companies and organisations that you work with. At the heart of Ad Net Zero is the principle of pre-competitive collaboration – when it comes to climate change, we are all living on the same planet – and it is inspiring to see how the major advertisers, agencies, media owners and tech companies are coming together to encourage change and to hold each other to account.

With each year that passes this decade, the need for evident progress will grow as governments, NGOs, businesses, and customers demand more from each other and themselves. Our Climate Action workstream is mission critical for the Advertising Association to demonstrate how responsible advertisers make a valued contribution to the UK's economic and social welfare, and how this progress can be accelerated through collaboration with international colleagues.

Ad Net Zero's Five Point Action Plan:

ACTION
01

Reduce Emissions from Advertising Business Operations

ACTION
02

Reduce Emissions from Advertising Production

ACTION
03

Reduce Emissions from Media Planning and Buying

ACTION
04

Reduce Advertising Emissions through Awards and from Events

ACTION
05

Harness Advertising's Power to Support Behaviour Change

The Campaign Ad Net Zero Awards

The Campaign Ad Net Zero Awards marked their second year, recognising where our industry is creating campaigns and supporting business practices that are both commercially successful and sustainable.

Thanks to Ad Net Zero’s expanding reach internationally, we were pleased to see a 17% increase in entries, encompassing 69 unique companies including 27 SMEs.

We assembled a distinguished panel of judges and an environmental jury of cross-party parliamentarians to thoroughly examine the advertising industry’s role in building a net zero economy. Kerry McCarthy MP, Baroness Parminter, and Chris Skidmore MP joined a panel to award the two top prizes. The International Grand Prix was claimed by Grey Colombia and Makro for their innovative ‘Life Extending Stickers’, while ITV and eBay secured the UK prize for their Love Island collaboration promoting pre-loved fashion.

As communicators, we have the potential every day to make a tangible impact on those who see our work. We urge everyone to look at the winning case studies as inspiration to help accelerate the drive to tackle the climate emergency.

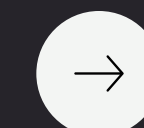


Among the winners were dentsu who took home Best Practice in Sustainability: Large Agency, sponsored by Google.



MARIELLA BROWN
Communications Manager,
Advertising Association

Visit campaignadnetzeroawards.com to register your interest for the 2024 awards!





Building an Inclusive Workplace for our Industry's Talent

SHARON LLOYD BARNES

Commercial Director and Inclusion Lead, Advertising Association

2023 has been a busy year for our Talent & Inclusion workstream. Starting the year with the launch of our Talent report at LEAD, we set the stage for pivotal moments. On March 15, we asked the industry to stop the clock once more to take part in our All In Census, gathering an astounding 19,000 responses – a testament to industry-wide support.

The subsequent All In Summit saw the unveiling of the results of the survey and was accompanied by brilliant speakers and profound insights. Furthermore, we empowered young talent through our iconic Media Business Course, shaping future industry leaders.

Our dedication persists in fostering a workplace where everyone finds a sense of belonging, and this commitment is embodied in the continuous recruitment and renewal of All In Champions. Through 2024, we will maintain our efforts in driving substantial progress within our industry.



Marking the Second All In Census

The All In campaign, at its core, encapsulates a resolute commitment to enhancing the diversity of our industry workforce so that the people making, buying, and selling advertising are reflective of the society we serve. On March 15, we asked the industry to take 15 minutes to participate in the second instalment of the All In Census. The survey is a collaborative effort from AA, IPA, ISBA, and Kantar, and stands as the largest of its kind, with almost 19,000 respondents this year.

On March 2, All In launched a new campaign created by the 2022 UK Young Lions winners, James Danson, Art Director, Havas Lynx Group and Glenn Scholefield, Copywriter, TBWA\MCR, to promote participation in the All In Census. The winning creative campaign depicted a hard-hitting work schedule featuring instances which highlighted common discriminatory behaviour in the workplace. The work was used in social media channels, printed posters, and digital Out of Home to build awareness about the survey.

The richness of data gathered from the second All In Census is unparalleled, providing us with invaluable insights into the areas where our efforts must be concentrated to drive meaningful progress. Since launching the All In campaign, we have received unwavering support, especially from the All In Champions; the companies that have adopted all of the All In actions to date. The press, too, played a vital role in promoting All In messaging, which was reflected in the All In homepage takeover by Campaign and the banners displayed by Little Black Book.

With the help of the results from the second All In Census, we aim to continue working towards creating a workplace where everyone feels they belong.



All In Summit

The All In Summit was held on May 11, 2023, featuring 9 sessions and 26 speakers, including prominent figures from the advertising and marketing sector. Some of the headline speakers included Dame Caroline Dinenage MP; Pete Markey, Chief Marketing Officer, Boots UK; Sarah Jenkins, Managing Director, Saatchi & Saatchi; Josh Krichefski, CEO, EMEA & UK, GroupM and President, IPA; Veriça Djurdjevic, Chief Revenue Officer, Channel 4, amongst others. The summit served as a platform to unveil the findings of the second All In Census.

While 89% of respondents believe their company is actively taking steps to be more diverse and inclusive, key findings from the All In Census also showed:

29%

of women believe gender is a hindrance to career progression, double the proportion of men.

1/10

respondents from an ethnic minority experienced racial discrimination at their current place of work.

11%

of all respondents and 8% of C-suite respondents are disabled.

5%

of respondents are aged over 55, compared to 21% of the UK working population.

20%

of respondents are from a working-class background, compared to 40% of the UK population.

LGB+

representation is significantly higher than in the UK population.

Alongside our All In initiative, we also have timeTo, our industry's initiative to eradicate sexual harassment in the advertising and marketing industries. The initiative was launched in 2018 by the AA, WACL and NABS and has a dedicated code of conduct – which members from across the industry are encouraged to implement – as well as a toolkit for companies with a training programme to raise awareness, educate employees and drive cultural change.

While the All In Census shows progress since 2021, some findings pose tough questions. We need to actively address these insights to make the industry more inclusive and diverse.

Explore our All In website to learn more.



Investing in Our Talent's Future

In 2023, we made immense progress when it comes to our talent workstream. Informed by Credos and a special Talent Task Force, the 'Investing In Our Talent's Future' report was presented at LEAD 2023 by our President Alessandra Bellini. The report emphasised the industry's imperative to address talent shortages through improved attraction, recruitment, development, and retention.

Key findings included a 14% decline in the advertising and marketing workforce from 2019 to 2022, with skills shortages particularly acute at entry and mid-levels. Digital and data skills were high in demand, reflecting broader trends in the UK business sector. Notably, the industry faced challenges in salary levels and progression, with adspend increasing by 42% since 2011, while average annual advertising (-4%) and marketing (-10%) salaries decreased when adjusted for inflation.

Furthermore, key initiatives include Front Foot's leadership in a campaign to promote advertising as a career choice, our collaboration with Adwanted to establish a Training Hub showcasing our core members' training offers for industry best practices, and ongoing efforts with the Government and officials on skills and apprenticeships by our Policy and Government Affairs team.

In 2023, we also launched the Talent Trailblazer Award in partnership with Marketing Week, to celebrate the organisations and individuals that are opening up the industry to new talent. VCCP's Stoke Academy was announced the winner of the inaugural Talent Trailblazer Award. The Stoke Academy aims to inspire, identify, and unleash creative talent in Stoke, providing young individuals with the opportunity to build successful careers in marketing and advertising without having to move to London.

With a focus on investing in talent as the core of our three-year strategy, we remain dedicated to the ongoing effort of attracting and retaining the very best talent to work in our industry.

Read the Advertising Association's Talent Report in full.



The Media Business Course

The Media Business Course (MBC) commenced with enthusiasm at the Grand Hotel in Brighton, marking the start of a highly anticipated four-day journey tailored for young professionals in the media industry. For almost 60 years, MBC has established itself as the course on media planning and pitching, where industry practitioners often receive a lifechanging learning experience.

The course was held from July 11 to July 14, 2023, with day one centred on strategy and insight. The engaging lineup of speakers included industry experts like Enyi Nwosu, Kat Bozicevich, Richard Huntington, and Katrina Dodd. Following a stimulating morning, Hamid Habib, Deputy MD of Havas Entertainment and Chief Experience Officer of Havas Media Group, shared valuable tips on how to succeed. The client brief was delivered by Nadine Young, CEO of Starcom, for Aldi.

Day two saw a shift in focus to hear from a range of media channels about why delegates should feature them in their plans. There were also inspiring and practical sessions from industry leaders on presentation and pitching skills.

Day three emphasised creativity and inspiration, featuring impactful sessions by Kevin Chesters and Amy Kean. The final day was the pitching day, where shortlisted syndicates presented their ideas, and after a competitive morning, Syndicate 9 emerged victorious. Comprising Chloe Bargery, Josh Freedman, Sinead Griffin, Sarah-Jane May, Raine Mooney, Ajesh Patel, Iman Sid, and Ollie Stokes, Syndicate 9 impressed judges with their mix of strategy, planning, and creativity.

MBC 2024, the 60th anniversary edition, is to be held from July 9 to July 12 at The Grand, Eastbourne.

Book to join us for MBC's 60th anniversary.





A Packed Events Calendar

SUZANNE COSTELLO

Events Director, Advertising Association

2023 saw our events programme go from strength to strength, kicking off with the first in-person LEAD since 2019, held at the Odeon Leicester Square with IPA and ISBA and attracting an audience of over 400 senior figures from across the industry.

The results of the second All In Census were revealed in May at the All In Summit and in June we headed to Cannes to showcase the best of UK Advertising with our partners and UKAEG (UK Advertising Export Group) members across a packed week of events.

We were back in Brighton in July for our Media Business Course, where the class of '23 tackled a brief set by Aldi over an intensive four-day programme.

September saw the welcome return of LEAD Scotland, where the Rt Hon Gordon Brown delivered a very special keynote to our members.

As part of our Front Foot programme, we held several member events including the AA/WARC Adspend Review, a webinar on the cost-of-living crisis and many more. We also brought together our AA and Front Foot members at our annual President's Reception in July.

Looking ahead to 2024, and as we prepare for the next general election, LEAD's mission to bring together advertising and politics becomes increasingly crucial. The year promises to be packed with great events, debates and discussions including the addition of LEAD North which we are taking to Manchester in May. Our events continue to be the place to discuss the biggest issues of the day with fellow industry leaders and key stakeholders across the political sphere.



“ LEAD was superb! So many key people from across the industry were there. It really is the event where decision makers are listening to the big issues advertising is facing and, crucially, coming up with actual solutions that can be implemented quickly.

GRAHAM ALEXANDER
Global Communications & PR Director, Teads



“ MBC is one of the highlights of my career so far. I learned so much and gained invaluable experience at pitching and presenting. I highly recommend the course to anyone working in media.

SINEAD GRIFFIN
Planning Manager, Wavemaker UK



“ Congratulations on a fantastically inspiring All In Summit. The content was diverse and engaging on so many levels.

GRAEME GRIFFITHS
Associate Director of Research, IPA





“ LEAD Scotland gave a fabulous insight into the challenges and bright spots within the Scottish ad industry. An excellent calibre of speakers made for a very informative conference. ”

CLARE TURNER
Sales Director, Pearl & Dean



“ LEAD is a unique moment in the year for advertising when people from across all parts of the industry come together with a shared commitment to continue making advertising better. ”

TOM STEVENS
Head of Marketing, IAB UK

Much of our AA event photography in this Annual Review is by the brilliant Bronac McNeill. Thank you Bro!



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Highlights from the AA's social activities throughout 2023





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