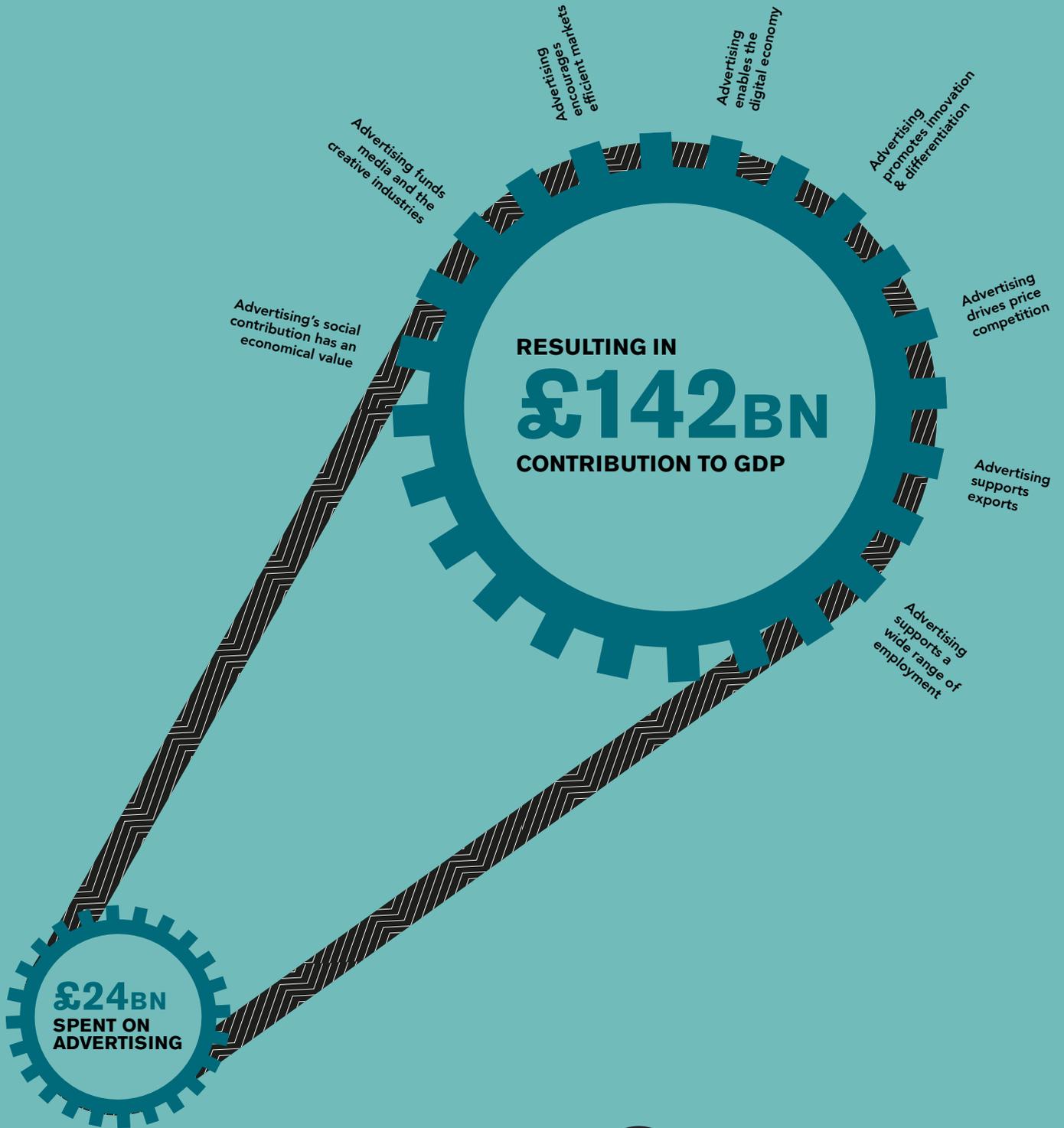




HOW ADVERTISING FUELS THE UK ECONOMY



**ADVERTISING
ASSOCIATION**

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REBUILDING THE BOND OF TRUST

KEITH WEED

President, Advertising Association

The past 12 months have been a landmark year for our industry as we tackle the most crucial issue we face, that of public trust in advertising. As AA President, I am committed to working with our members on a system change that will help rebuild the hugely important bond of trust between our industry and the consumer.

In March we published our paper on 'Arresting the Decline in Public Trust in Advertising'. This document was the result of ground-breaking research by Credos and has been developed by our Trust Working Group, chaired jointly by the IPA and ISBA, whose members have been hugely supportive in our drive to tackle this issue together.

The paper outlined five key goals to restore public trust in advertising, including reducing bombardment and excessive frequency, supporting the role of ASA as advertising's self-regulatory body, and ensuring that people's data privacy matters. These goals are crucial to the future of our industry and I urge everyone who works in UK advertising to rally fully behind them. We have already seen significant progress in achieving our aims through initiatives like supporting the implementation of IAB UK Gold Standard, industry backing for the ASA's new digital-focused five-year strategy, and a forthcoming best practice white paper addressing frequency capping and retargeting. In 2020, we must build on this and keep up momentum as we look forward to demonstrating the social contribution that advertising makes to our country.

Beyond public trust and our industry's contribution to society, we have taken a leading role in advising industry on preparations for Brexit and in representing our members to Government on this crucial issue. We have also been active in ensuring our country is rightly seen as the global hub for advertising and in encouraging exports of UK ad services to international markets.

As we prepare for another year that is likely to bring profound change for our industry and our country, we must do our utmost to work together, united in our determination to see a healthy, sustainable future for advertising. A future where we are trusted by the public and contribute wholeheartedly for the greater good of society.

“

**WE MUST DO OUR
UTMOST TO WORK
TOGETHER, UNITED IN
OUR DETERMINATION
TO SEE A HEALTHY,
SUSTAINABLE FUTURE
FOR ADVERTISING**



ADVERTISING'S PIVOTAL YEAR

PHILIPPA BROWN

Chair, Advertising Association and Worldwide CEO, PHD

2019 was a pivotal year for responsibility in advertising. From the creation of the Global Alliance for Responsible Media (GARM) to the All-Party Parliamentary Group (APPG)'s call for more responsible advertising as part of reforms to online gambling, responsibility has dominated the headlines and boardroom agendas across the UK.

Over the past few years the Advertising Association has played a key role in bringing together the industry and arming them with insights and data to rebuild trust in advertising. However, as we enter another decade with Brexit still on the horizon and with trust at an all-time low, it is more important than ever for the advertising industry to up the ante to rebuild public trust. This is exactly what the Association's new mission and strategy have been designed to do.

But it's not just down to the Association. Advertisers and their partners need to double down on being straightforward and transparent in everything that they do.

Initiatives like the Association's Front Foot are an important part of this. Created to identify specific collaborative actions, processes and protocols for protecting consumers and brands from safety issues, the alliance not only plays a crucial part in creating a sustainable industry but also offers a blueprint for shifting the dial when it comes to responsibility within our companies and teams.

From empowering teams to share failures as well as successes to taking responsibility at an individual, company and industry level, there is a lot that



**IT IS MORE IMPORTANT
THAN EVER FOR THE
ADVERTISING INDUSTRY
TO UP THE ANTE TO
REBUILD PUBLIC TRUST**

brands and agencies looking to promote the value of responsible advertising can (and should) learn from the likes of Front Foot and GARM. However, the biggest lesson here is the need to be more assertive and decisive.

At PHD, we talk a lot about the need to take strategic and imaginative leaps in order to drive growth. But it's not just talk – the talk drives action. This is exactly what the industry needs to do. We need to be bold in our thinking and actions and take real responsibility for the growth and success of both our industry and the wider economy.



A NEW MISSION FOR A NEW ERA

STEPHEN WOODFORD

Chief Executive, Advertising Association

The AA's last three-year plan - Further, Wider, Deeper – ended in 2019 and we met many of the aims we had set out to do in our mission to represent our members and be the voice of UK advertising at a national, and increasingly international, level.

Since 2017, we have increased our engagement with the Government and our industry across areas such as public trust, Brexit, HFSS advertising and obesity, domestic and international talent, data and e-privacy, gambling advertising, digital regulation, support for the ASA and self-regulation and promotion of the UK's booming advertising exports.

But with a new year in 2020 comes a new strategy to lead us forward into the coming three years. The leadership from all our members has been closely involved with its development and it has their whole-hearted support. Our goals for the next three years fall under three broad areas: Responsibility – providing leadership and guidance on what standards are expected of UK advertising; Trust – rebuilding public trust in UK advertising; and Growth – advertising as a key driver of competition, innovation and growth.

To deliver on our Responsibility, Trust and Growth agenda, we believe it is now time to refresh our mission and adopt a phrase that focuses on the importance of our new strategic goals: To promote

the role and rights of responsible advertising and its value to people, society, businesses and the economy.

This new statement reflects the centrality of our Responsibility, Trust and Growth agendas. Responsible advertising achieves its purpose of growing businesses and the economy by better serving people and society. At the heart of this is rebuilding and maintaining Trust in advertising. It must also be sustainable and we all have a role to demonstrate how this can be compatible with growth.

This new mission provides a strong platform for leadership and guidance around our priority areas. Alongside stronger 'responsibility' advocacy, we must also defend the right to commercial free speech and to advertise responsibly.

We believe this new mission and three-year plan will strengthen advertising as one of the key drivers of sustainable growth and prosperity for the UK and we thank all our members for shaping this plan and delivering it in the future.

OUR NEW MISSION

**TO PROMOTE THE ROLE AND RIGHTS OF RESPONSIBLE
ADVERTISING AND ITS VALUE TO PEOPLE, SOCIETY,
BUSINESSES AND THE ECONOMY**



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Link™ mortgage,

REBUILDING PUBLIC TRUST IN ADVERTISING

In March 2019, our President Keith Weed launched our paper – ‘Arresting the Decline of Public Trust in Advertising’ – at the ISBA Annual Conference. It was published by our Trust Working Group, chaired by the IPA and ISBA with members including Google UK, ITV, Direct Line Group and the IAB who have all come together to tackle the issue for our industry.

The Trust paper contained five clear measures to increase levels of trust and, over the following months, we have made clear progress to put these aims into action:

ACTION 1
WE WILL REDUCE
ADVERTISING
BOMBARDMENT

We are focused on ensuring full implementation of the IAB UK's Gold Standard, which aims to improve online user experience with advertising. Many organisations including the IPA and ISBA are working hard to fast-track awareness and encourage other relevant businesses to sign up. At the same time, progress is being made with colleagues in the US to explore ways to further tackle this at a global level.

ACTION 2
WE WILL REDUCE
EXCESSIVE
ADVERTISING
FREQUENCY AND
RE-TARGETING

We are publishing a best practice white paper addressing the issues of frequency capping and retargeting in Q1 2020. This will be led by ISBA with a plan to roadshow the findings to advertisers, agencies and media in the following months to ensure widespread awareness and understanding.

ACTION 3
WE WILL ENSURE
THE ASA IS
"BEST IN CLASS"

A new campaign for the ASA is launching in Scotland in Q1 2020 as a national year-long test to measure the impact on public trust. It is being developed and supported by media, agencies and brands in Scotland. Alongside this, we are determined to protect our industry's ability to self-regulate by supporting our industry's self-regulatory body, the Advertising Standards Authority, and its new five-year strategy More Impact Online.

ACTION 4
WE WILL ENSURE
THAT DATA PRIVACY
MATTERS

We want to ensure that data privacy matters to everyone in our industry, that everyone observes the standards that are required and that this is recognised by the public. Our focus as an industry has been to ensure we work as effectively as possible with the ICO across all areas of its interest in the use of data for advertising solutions.

ACTION 5
WE WILL SHOW
THAT ADVERTISING
CAN DRIVE
SOCIAL CHANGE

We are demonstrating how industry-wide support for big social issues makes a real difference in our country and a meaningful contribution to society. This is the central subject of our Advertising Pays 8 report looking at the value of the social contribution made by advertising to the UK which launched at LEAD 2020. The report contains a number of case studies and examples from across our membership and the UK advertising industry.

These actions are just the beginning of a long journey. We are determined to rebuild the public's faith and trust in our industry and will continue these efforts not just in 2020 but in the years to come.

SPREADING THE WORD ABOUT TRUST

Rebuilding public trust in advertising is at the heart of our mission as an organisation and a consistent theme of our events programme throughout 2019.

We kicked things off at our flagship event LEAD in January 2019 where Karen Fraser MBE, Director of Credos, revealed how and why public trust in advertising is in long-term decline. In response, our President Keith Weed laid out his vision in his keynote speech for rebuilding trust in our industry and offered an ultimatum - it's "trust or bust" for advertising. He called on the audience to join in a much-needed system change in our industry.

Trust was up on stage at a myriad of events in subsequent months including the ISBA Annual Conference, IAB Digital Britain, media360, Cannes Lions, Advertising Week New York, the Media Business Course and LEAD Scotland. At the same time, the Credos team and AA colleagues went on an industry-wide roadshow, presenting the research findings to hundreds of advertising professionals at more than 40 agencies, advertisers and media owners across 2019.

A special Front Foot Breakfast in April brought advertisers, agencies and media owners together to find industry-wide solutions that would tackle the issue of excessive frequency in advertising. The breakfast was held in the stunning setting of Jellyfish's offices in The Shard and was led by our Front Foot Chair, Mark Evans.

We also took the topic of trust to the heart of Westminster. In May we hosted an event in the Attlee Room of the House of Lords. In a panel session chaired by Phil Smith, Director-General of ISBA, the broader debate on the decline of public trust in businesses and institutions was discussed, as well as the issues of bombardment, poor ad placement, the rise of fake news and the lack of political ad regulation. The latter topic was one that was further discussed by a Select Committee which included evidence from our President, Keith Weed.

These many events have all served a vital purpose to bring together all parts of our industry, raise awareness of the issues we face and collaborate on practical industry-wide solutions. These discussions will continue in 2020 and beyond as we seek to rebuild public trust in our industry.



ADVISING OUR INDUSTRY ON BREXIT



In the run up to the planned October 31 deadline for Brexit, we ran an industry-wide advertorial campaign to help businesses understand the complex issues involved and save time and money by providing free, practical advice.

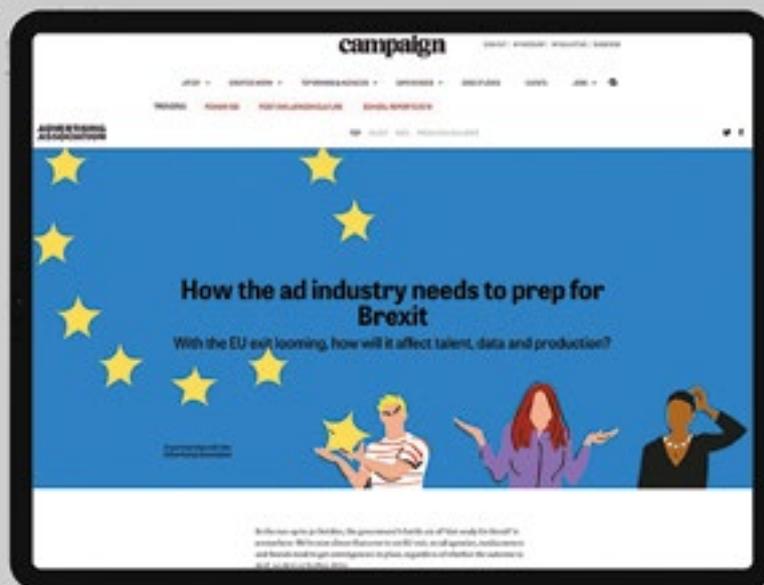
The campaign was financed from the Government's Brexit Business Readiness Fund, which was made available to business organisations and trade associations in the UK to support their members and the industries they each represent to prepare for Brexit.

We took the decision to apply for the funding as we recognised it was vital that businesses right across our industry undertook the necessary steps to ensure that they kept on trading as seamlessly as possible post-Brexit.

With this in mind, we identified key areas where Brexit would have widespread implications for advertising, including data, trade and talent. The objective of the campaign was to ensure the UK's advertising industry was clear on the priority areas they needed to get ready for and understood where they could get more information. The outlets we worked with to share information were Campaign, Digiday, The Drum, Little Black Book, Marketing Week and Mediatel Newsline.

We focused on directly relevant information, filtered from the main Government advice by our team of specialists. It was crucial that, in the circumstances of a no-deal Brexit, businesses across the advertising industry were prepared to have the right mechanisms in place so that their EU/EEA colleagues could gain the correct residency status; that they could continue trade as freely and with as little hindrance as possible; and that the data that keeps the advertising industry working effectively kept flowing.

The need for this information campaign was supported by research conducted among our members during September 2019 by Credos. The research showed only 23% of our industry felt even moderately prepared for Brexit, leaving more than 40% minimally prepared or not at all. The research revealed businesses' need for more information, if not from Government, then from industry bodies. Our aim was that supplying this advice and guidance will provide greater confidence for investment decisions not only now, but in the months and years ahead.





HM Government

BREXIT 31 OCTOBER



Get ready for Brexit



Prepare for Brexit at gov.uk/brexit





OUR PUBLIC AFFAIRS WORK

Public Affairs is crucial to the work of the Advertising Association. As the voice of industry to Government, we have an active outreach programme to engage with politicians, policy-makers and Whitehall officials. This activity is not limited to Westminster, with increasing engagement in Scotland and the wider nations and regions of the UK. In a year dominated by Brexit, we were active in Brussels as well as liaising with our advertising industry colleagues from other European countries.

WORKING WITH GOVERNMENT ON MULTIPLE FRONTS

2019 was a busy year for the AA on the public affairs and regulation front. Despite the turbulence at Westminster and the challenges of Brexit, we faced significant challenges from Government and regulators – from the threat of new HFSS restrictions to the Information Commissioner’s Office interim report on ad tech and real time bidding.

All of these areas involved significant workstreams, bringing stakeholders from across the industry together in working groups. It also meant developing considered responses to around 20 consultations, and publishing original thought-pieces – as we did on HFSS, with the commissioning of economist Stephen Gibson to do a detailed analysis of the Government’s impact assessment on how new advertising restrictions would affect obesity.

We also launched a new Digital Advertising Working Group, chaired by Stephen Woodford to sit alongside our long-standing Data and e-Privacy Group, chaired by DMA Group CEO Chris Combemale. The Food Advertising Unit met regularly to input to the work on HFSS and, more broadly, we continued our bi-monthly PA breakfasts open to all members where we discuss a range of different policy issues we are working on.

We engaged with many MPs and civil servants through this year’s Westminster and Whitehall outreach programme and also with Holyrood politicians and civil servants on issues of importance – from HFSS to the Alcohol Strategy.





2019: A YEAR DOMINATED BY THE UK'S RELATIONSHIP WITH THE EU

2019 will perhaps be remembered for being the year that Brexit did not happen. Parliament was stuck in a state of paralysis over Brexit - three deadlines were set and missed.

Despite these uncertainties, the Advertising Association worked closely with Government officials and members to get businesses ready for a potential No-Deal scenario. Over the course of the year we hosted several industry roundtables with officials, breakfast briefings and published preparedness guidance on our website. We also welcomed Philip Rycroft, former Permanent Secretary at the Department of Exiting the EU, to speak at AA Council and give his candid thoughts on the challenges that lay ahead.

Additionally, the AA was one of the first 50 organisations that made a successful bid for the BEIS Business Brexit Readiness Fund (*read more on this on page 14*). The successful proposal involved generating an advertorial-led campaign via trade

media - Campaign, The Drum, Marketing Week, Digiday UK, Little Black Book and Mediatel – to help industry preparedness and provide guidance on the priority areas ahead of the 31 October deadline. Within the first two weeks of launching, it became the second most read story on Campaign.

One of the key learnings from these activities is that this guidance has been helpful for businesses to cut through the noise. But ultimately it has been difficult to prepare for what can only be best described as unknown unknowns as the potential of a No-Deal scenario rose and fell.

In the meantime, we took an active role in trade policy work - we participated in several working groups as well as responding to consultations. This work will steadily increase in importance once the Brexit negotiations move to phase two; hence it is critical that advertising retains a strong voice to protect its interests.



ADVOCATING INDUSTRY'S POSITION ON HFSS

A year ago we published a report on childhood obesity and the role of advertising and, since then, our Public Affairs activity in this area of crucial importance to large parts of our membership has continued strongly. During 2019, the Government followed through on various commitments to consult on measures aimed at tackling rising obesity prevalence among young people. The package of measures, announced in 2018, largely focused on the food and drink manufacturing sector, and of foremost concern for the advertising sector has been the proposed pre-9pm watershed restriction on TV and online.

We have been clear with policy-makers throughout the debate that this proposed measure will do nothing to reduce obesity, at the cost of a significant burden on all parts of industry. Agencies, brands and media owners alike are extremely concerned about the baseline hit and indeed the knock on repercussions – whether that be investment in content, production work, or even reformulation programmes which could be at risk should companies be unable to bring new, and healthier, products to market.

Our response to the Government consultation reiterated our arguments against the evidence base for pursuing further restrictions on advertising,

backed up by an independent economic analysis of the Government Impact Assessment which found the proposals were not fit for purpose.

Where this ends up remains to be seen. For its part, industry continues with ground-breaking initiatives which could play an important role in helping reverse current obesity trends. ITV and STV have long championed the Daily Mile, and last year launched the new 'Eat Them to Defeat Them' campaign, aimed at encouraging children and young people to eat more vegetables. This year, the campaign continues with new backing from Channel 4 and Sky, and a brand new Media Smart resource on the subject. Elsewhere, advertisers are continuing to engage in programmes around exercise and responsible eating habits. In the out-of-home (OOH) sector, Outsmart has launched 'Get Smart: Outside' which is using OOH inventory to promote healthy and active lifestyles.

The evidence is clear: targeted and holistic interventions – focused where needed the most – work. Blanket bans and whole population restrictions will not meaningfully change the lifestyle choices which contribute most directly to the UK's rising childhood obesity levels.

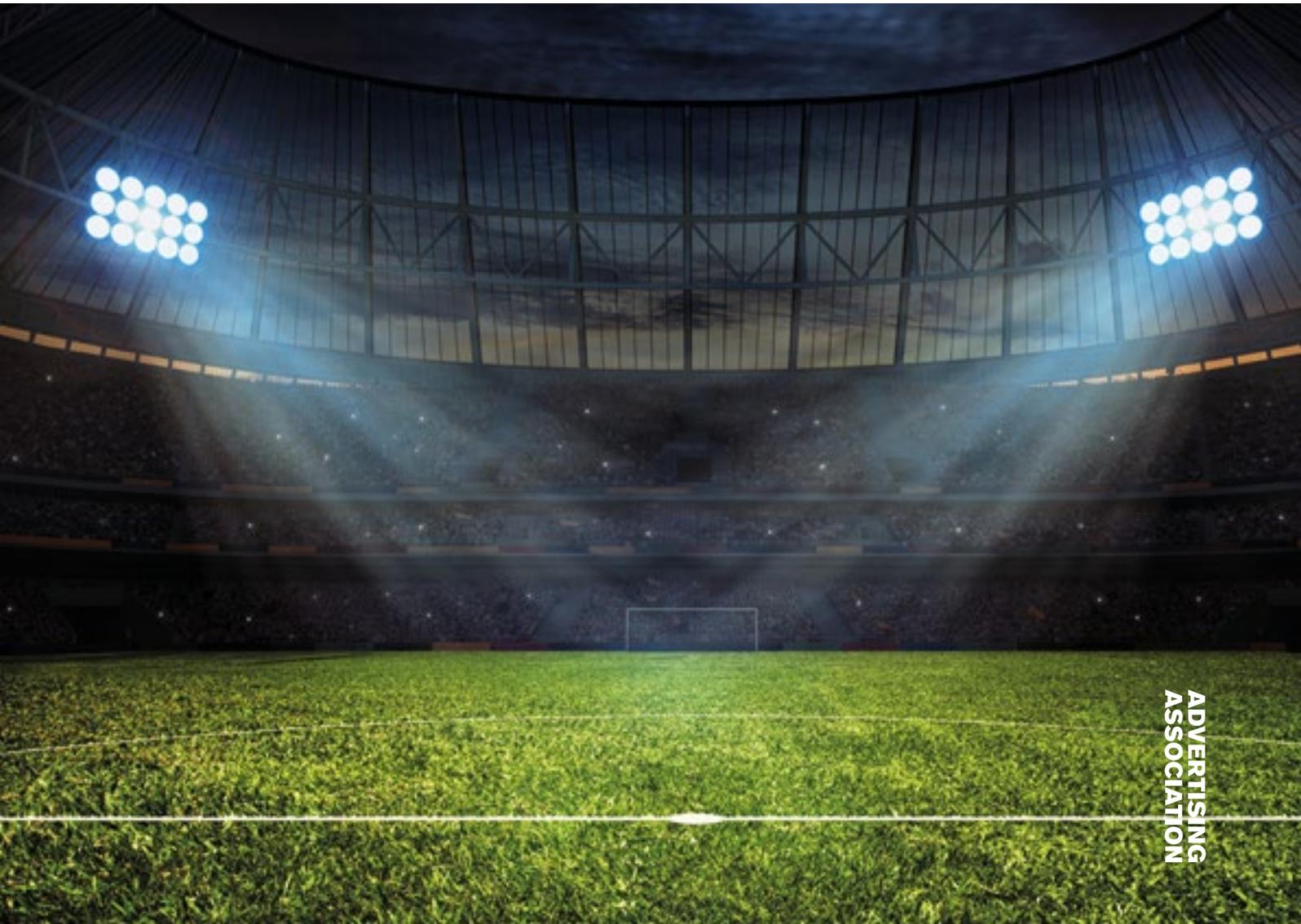
RESPONSIBLE ADVERTISING AND THE GAMBLING SECTOR

Gambling harms were a continued focus for policy-makers in 2019. Strict self-regulatory controls on advertising are maintained by the ASA and further industry-led initiatives, including a whistle-to-whistle ban, came into force in the summer. Despite this, pressure continued on gambling advertising amid concern around wider gambling harms.

A new committee in the House of Lords – the Select Committee on the Social and Economic Impact of the Gambling Industry – was formed with a wide remit. It covers many of the issues discussed in media coverage and raised by politicians such as Tom Watson and the Gambling Commission. These include advertising links to sport and gambling by young people.

The inquiry is another example of the scrutiny under which the gambling industry operates. In addition, the APPG on Gambling Related Harm published a report at the end of the year which contained a number of recommendations including a need for the sector to urgently adopt a more responsible approach to advertising that protects children and the vulnerable.

Work will continue in the year ahead to ensure young people are not exposed to adverts for gambling related products and that wider marketing activity remains responsible. The advertising industry is actively working with gambling operators to explore technological solutions in this space.



SPOTLIGHT

DIGITAL ADVERTISING

Our industry is becoming increasingly digital and, over the course of 2019, our Public Affairs activity and campaigning continued to reflect these market trends.

Advertising Pays 7: UK Advertising's Digital Revolution, published by Credos, demonstrated the strength of online advertising in the UK, with online advertisers spending £13.4bn in the UK in 2018 – making it the third-largest online advertising market in the world. Online advertising is undergoing remarkable growth, but with this growth there comes an unprecedented amount of regulatory scrutiny.

In September 2019, we launched the Digital Advertising Working Group to meet the challenges of increased regulatory scrutiny and the trend toward digital technologies. Chaired by our Chief Executive Stephen Woodford, the group's focus is on the crucial issues at play in digital advertising with the aim of building industry consensus around three strands of work:

Regulation: Developing policy positions on online regulation that can command broad industry support that impact on the advertising ecosystem, in particular addressing the ICO's Adtech Report

Consumer trust: Discussing and helping further the progress being made by the AA Trust group on implementing the Trust Action Plan, particularly as regards consumer concerns about bombardment, excessive frequency and re-targeting

ASA strategy: Supporting the ASA's 'More Impact Online' and help them achieve their 5-year objectives

Our outreach programme has seen us host our Advertising Pays 7 showcase event in Portcullis House, Westminster on September 3 (*read more on this on page 36*), which brought industry and policy makers together to look at online advertising and its contribution to the UK. Stephen Woodford also gave a keynote presentation at a Westminster Media Forum event on July 11 about the digital revolution of the UK advertising industry.

Simon McDougall, Executive Director – Technology Policy and Innovation at the Information Commissioner's Office was invited to speak at AA Council in October and at LEAD 2020 he shared the ICO perspective on issues of data privacy and digital advertising with leaders from across the membership and wider industry.

Online advertising delivers a number of benefits: firstly, the potential for more targeted, relevant and timely ads and, secondly, it funds a host of online services that consumers can access at no cost. In addition, many media channels depend on online advertising revenues to finance their content and, all of this combined means we lead the world when it comes to the most advanced online advertising marketplace.

We are determined to take this message to policy makers in Westminster and beyond.

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SPOTLIGHT

DATA AND ADVERTISING

Data is a crucial issue for our members and has been an important part of Public Affairs activity throughout 2019. Our Data & e-Privacy Working Group was first established in 2012 in recognition of the growing importance of personal data in advertising and in response to the adoption of GDPR at the EU level. At the time it was felt necessary to develop an industry-wide strategy towards data regulations, step up engagement with policy-makers and agree policy positions.

Since GDPR came into effect on 25 May 2018, EU policy-makers have been reviewing the e-Privacy Directive, with a view to upgrading the current legislative framework considering new players providing electronic communications, and changing the rules on cookies to align with GDPR among others.

Under the chairmanship of Chris Combemale (CEO, DMA) and meeting four times a year, the Working Group has been actively monitoring developments of the draft regulations and forming policy positions. The EU Commission has been lobbied on conducting a new impact assessment and we have also voiced our concerns at the prospect of the e-Privacy Regulations effectively making it illegal for publishers and other online services to make access to their services conditional on consent.

Data was also identified by our Strategic Policy Advisor Konrad Shek as a crucial issue for businesses to be aware of in leaving the EU. We issued advice as part of our Brexit advice campaign to industry, highlighting that it was important to have contingencies in place if receiving personal data from other countries, in particular the EEA, so that they could continue receiving personal data lawfully post-Brexit.

During the autumn party conference season, we partnered with the Institute for Government for fringe events at the Labour and Conservative Party Conferences on *The database state, data-driven companies: where next for personal data?*

The panels discussed how Government can use data to deliver effective public services and how the public sector can learn from the private sector on data use. Our industry action plan to rebuild public trust in advertising was also cited as a key measure as it commits to ensuring data privacy matters by supporting the work of the Information Commissioner's Office.

Speaking on behalf of AA member the DMA at the panel event at Labour's Conference, Rachel Aldighieri spoke about the importance of building trust in the digital marketing sector, noting that "Trust is the single biggest reason you will hand over your data to a company".

ENGAGING WITH EU ADVERTISING POLICY

We continue to follow relevant policy debates in Brussels, from e-privacy to consumer rights, as such conversations will affect the advertising industry in the UK, whatever happens with Brexit.

To help with this, we maintained a regular dialogue throughout 2019 with the European industry bodies based in Brussels as part of a network we run in partnership with the German and Austrian advertising associations, called the Advertising Information Group.

We held quarterly meetings and a Directors' Lunch on October 2 where our guest speaker was Othmar Karas MEP, Vice President of the European

Parliament. This was also attended by officials from the European Commission.

The AA also sits on the Board of the European Advertising Standards Alliance (EASA). This brings industry together with self-regulatory bodies like the ASA from across Europe, to debate current and future challenges to advertising self-regulation. Among other issues, EASA has developed best practice guidance on influencers.





ADVERTISING AROUND MAJOR SPORTING EVENTS

Advertising around live sport has been a key area of focus for the Public Affairs team in 2019, as Parliamentary discussions in Westminster and Holyrood took place to decide the legal framework for advertising and trading around the UEFA European Championship matches taking place this summer in Glasgow, as well as the next Commonwealth Games in Birmingham in 2022.

Public Affairs activity included a variety of stakeholder meetings, roundtables, outreach with relevant departments and authorities at both Westminster and Holyrood.

BIRMINGHAM COMMONWEALTH GAMES BILL

The Bill will create a new offence restricting the advertising of products, services or businesses from advertising to the public in the vicinity of a sporting venue or event, enforceable by Trading Standards Officers.

The Government is also introducing a right to prevent businesses from suggesting an association with the Games. The aim of this is to stop ambush marketers from gaining commercial benefit from the Games, and to make it attractive to sponsor the Games.

Our Public Affairs team voiced member concerns around the length of time the vicinity and trading

restrictions are in place; the need for full public scrutiny of the regulations and comprehensive exemptions for the sale and/or distribution of newspapers and magazines.

In order to represent industry's position, we held our roundtable at DCMS in June with members who would be most impacted by potential restrictions and we continue to consult with members, DCMS and the Organising Committee regarding concerns and questions about the Bill.

UEFA EUROPEAN CHAMPIONSHIP (SCOTLAND) BILL

In September, the Scottish Parliament published the UEFA European Championship (Scotland) Bill with advertising and trading restrictions similar to those contained within the Glasgow Commonwealth Games Bill. The tournament is being held from June–July 2020 in multiple locations around Europe, with Glasgow being one of the venues for four matches.

Last October, shortly after the Bill was published, Senior Public Affairs Manager David Henderson gave evidence to Holyrood's Culture, Tourism, Europe and External Affairs Committee regarding potential restrictions proposed in the Bill. He urged the Committee to ensure an exemption for newspapers and magazines to ensure freedom of press reporting throughout the events.



CREDOS - UK ADVERTISING'S THINK TANK

Credos is the advertising industry's think-tank, led by Director Karen Fraser MBE. It was established in 2010 by the AA, as part of our mission to re-build public trust in advertising and maintain the freedom to advertise responsibly in the UK.





UK Advertising's Think Tank

Credos is funded by the advertising industry and overseen by an advisory board to assure the quality of its work. Credos' mission is to understand advertising: its role, how it works, how it is perceived and its value to UK society and the economy. Credos is committed to an honest appraisal of advertising, identifying its shortcomings as well as its positive features, so that the industry can address its findings. Through Credos, the AA is able to examine emerging cultural movements and ideas shaping our industry in the UK.

During 2019, Credos' key focus has been on the research and report on rebuilding public trust in advertising, which launched in March and the 7th in the respected Advertising Pays series of reports, which studied the digitalisation of the UK advertising industry and launched in June. The crucial social contribution of advertising is the focus of Advertising Pays 8, which launched at LEAD 2020 in January. The report looks at the many ways that our industry contributes to the communities it serves up and down the country through initiatives such as donating inventory to good causes and CSR programmes, public health campaigns, and highlighting issues around diversity and inclusion.

For more information on Credos and its work, please contact the Credos team:

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ADVERTISING'S DIGITAL REVOLUTION

62% of all digital ad spend in the UK is accounted for by the advertising industry

UK 30% of all digital ad spend in the world

UK ADVERTISING IS AN EXPORT POWERHOUSE

1. UK advertising exports are worth **£3.9 BN**
2. UK advertising exports are worth **£3.9 BN**
3. UK advertising exports are worth **18%** of total UK advertising spend and **7%** of total UK advertising revenue

UK advertising exports are worth **£3.9 BN**

TOTAL EXPORT VALUE OF ADVERTISING SERVICES & COMPARATIVE INDUSTRIES

£6.47bn

Year	Value
2014	£1.7bn
2015	£2.2bn
2016	£2.8bn
2017	£3.4bn
2018	£4.0bn
2019	£4.7bn
2020	£5.4bn
2021	£6.1bn
2022	£6.47bn

THE ECONOMIC IMPACT OF ADVERTISING IN SCOTLAND

£3.8 BN

ADVERTISING PROVIDES JOBS IN THE UK

986,000

3.5% of total UK workforce

3.5% of total UK workforce

3.5% of total UK workforce

THE UK ADVERTISING AND MARKETING WORKFORCE

UK WINS THE MOST CANNED LIONS IN EUROPE

ADVERTISING PROVIDES JOBS IN THE UK

986,000

ADVERTISING PAYS 7

TELLING THE STORY
OF UK ADVERTISING'S
DIGITAL REVOLUTION



ENDERS|ANALYSIS

On June 5, we launched the seventh edition in the Advertising Pays series of reports from UK advertising think tank, Credos, which tell the story of advertising's contribution to UK society and the economy.

The report, UK Advertising's Digital Revolution, was produced by Credos in partnership with Enders Analysis and was launched at IAB Engage in central London, by Karen Fraser MBE (Director, Credos) and Claire Enders (Founder, Enders Analysis). They presented the findings of the report and also premiered a new animation, bringing the report to life in a new and highly visual format.

UK Advertising's Digital Revolution reveals the extent of growth and scale of the UK online advertising market on the world stage over the last 25 years. The findings show the UK is the largest online advertising market in Europe, and the third largest in the world, behind only the United States and China in online advertising spend in 2018. It places the UK well ahead of Japan and Germany, both economic powerhouses with larger populations.

The findings also showed that UK online advertising expenditure, relative to the size of the economy, is now the highest in the world, at 0.63% of GDP. Online advertising contributed 57% of the UK's total advertising spend of £23.6 billion in 2018 and is predicted to account for 62% by 2020. Twenty years ago, online expenditure did not even register in published statistics.

The report also showed how the UK's strong online economy has powered the growth of online advertising. At £1,868 per person, the UK retail e-commerce expenditure per capita is higher than in any other G20 market. Both online advertising expenditure and internet retail expenditure in the UK have almost trebled since 2010.

As a result, a large and diverse ad tech sector has developed in the UK, employing tens of thousands and comprising more than 300 UK-headquartered companies, attracting more than £1 billion in investment since 2013. Together, these UK ad tech companies employ over 19,000 UK workers, almost four times as many as the largest advertising tech platforms in the UK, such as Google and Facebook, combined.

At the same time, the report demonstrates how online advertising boosts UK small and medium-sized businesses (SME) and more SMEs now advertise than ever – rising from 30% of SMEs in 2013 to 42% in 2017 – as the opportunity to target consumers more effectively on a small budget has never been better.

ADVERTISING PAYS 8

UK ADVERTISING'S
SOCIAL CONTRIBUTION

Our newest entrant into the Advertising Pays series is focused on the contribution that UK advertising makes to our society. Over the last ten years, the Advertising Pays has established clearly the economic contribution of the advertising industry to the UK. We know advertising converts £1 spend of advertising into £6 of UK GDP and, in the process, it supports a million jobs.

But beyond the economic benefits of advertising lies a wealth of ways that it has helped to improve and change society and act as a progressive force in people's lives. Advertising Pays 8: UK Advertising's Social Contribution includes real examples of the ways British advertising makes a positive contributions to our society – from the media inventory donated to good causes, to the pro-bono work of world-class creative agencies, and from the advertising campaigns that promote behaviour change nationwide to the thousands of hours volunteered by UK advertising professionals in CSR-related activities.

Healthy living campaigns and charity initiatives like Cancer Research UK's Sprintathon are cited in the report alongside the likes of broadcaster support for the Daily Mile to help get children more active and the 56 Black Men project to change racial perceptions. The report shows how the UK advertising industry is conscious in many ways of its role and conscious of its responsibilities.

Advertising Pays 8 also includes new research looking into how the public views our industry's social contribution and what people want to see from advertising. It also gathers together the thoughts of leaders from across the advertising industry to ask how they see the social role of advertising today and their thoughts on how this might develop in the years ahead. The report draws to a conclusion with a look forward and ideas for how our industry can continue to contribute to our society in the future.

A copy of the full report is available to download on our website and if you'd like to know more, please get in touch with the Credos team or one of us here at the Advertising Association.

SHOWCASING ADVERTISING'S DIGITAL REVOLUTION IN WESTMINSTER

We hosted a special showcase event on UK Advertising's Digital Revolution at Portcullis House in Westminster on September 3.

The UK's world-leading position in digital advertising took centre stage as we highlighted the growth of digital advertising and connected the businesses behind the UK's digital revolution with the politicians and officials involved in policy-making.

The event featured several companies and organisations involved in our Advertising Pays 7 report, including the IAB, Loop Me, TV Squared, Newsworks, Adsmart from Sky and Media Smart. There was also cross-party attendance from MPs

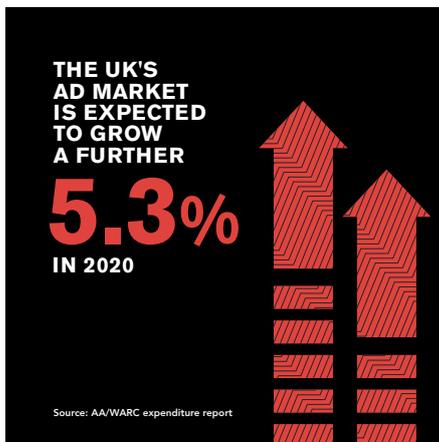
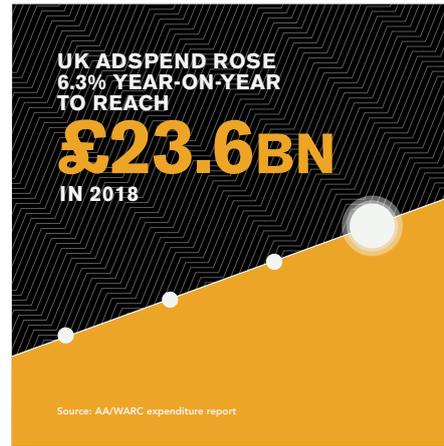
including Kevin Brennan and Christine Jardine, alongside staff members from MPs' offices and officials from Whitehall departments, such as DCMS.

Guests heard how digital advertising has transformed the exhibitors' businesses and the wider UK economy. We are now the largest online advertising market in Europe, the third largest in the world and UK retail e-commerce expenditure per capita is higher than in any other G20 market.

The event demonstrated the continuing power of our Advertising Pays series to generate interest right across the political, business and media landscapes.

Image below: Stephen Woodford is pictured with Kevin Brennan MP, Shadow Minister for Arts and Heritage.





UK ADVERTISING RECORDS NINE YEARS OF CONSISTENT GROWTH

Our Advertising Association/WARC quarterly Expenditure Report is the definitive guide to advertising expenditure in the UK. Impartial and independent of any media channel or agency affiliation, it is the only source of historical quarterly adspend data and forecast for the different media for the coming eight quarters.

The annual results are of particular interest each year and we revealed the 2018 figures at an exclusive event for our Front Foot members in April at Jellyfish's offices on the 22nd floor of The Shard in London.

UK adspend rose 6.3% year-on-year to reach £23.6bn in 2018 - the highest annual total since monitoring began in 1982 and nine years of consecutive growth.

Advertising spend is forecast to grow 5.5% in 2020, which would push investment to over £26bn, completing more than a decade of continuous expansion for the UK advertising industry.

Stephen Woodford commented on the results: "These figures demonstrate, once again, the strength and resilience of the UK advertising industry during a time of political and economic uncertainty in the UK."

For more information about the expenditure report and how to subscribe, please contact: Heather.Young@adassoc.org.uk

A NEW LOOK FOR THE ADVERTISING ASSOCIATION

We unveiled our new look at LEAD in January, following several months of work with HexStudio. As well as a logo refresh, we redesigned our website, our social media assets, our industry reports and stationery. We also brought the branding for our Front Foot network and Credos into the mix to ensure consistency across the AA's output.

Our objective has been to put advertising at the heart of our new look, just as it is at the centre of all we do as an association. We include images of the work we represent wherever we can in a consistent showcase of our members' creative excellence.

We are always looking to include the best of British advertising so if you would like your work to feature in our branding, please contact a member of the Communications team. In the meantime, here's how our new brand has taken shape.

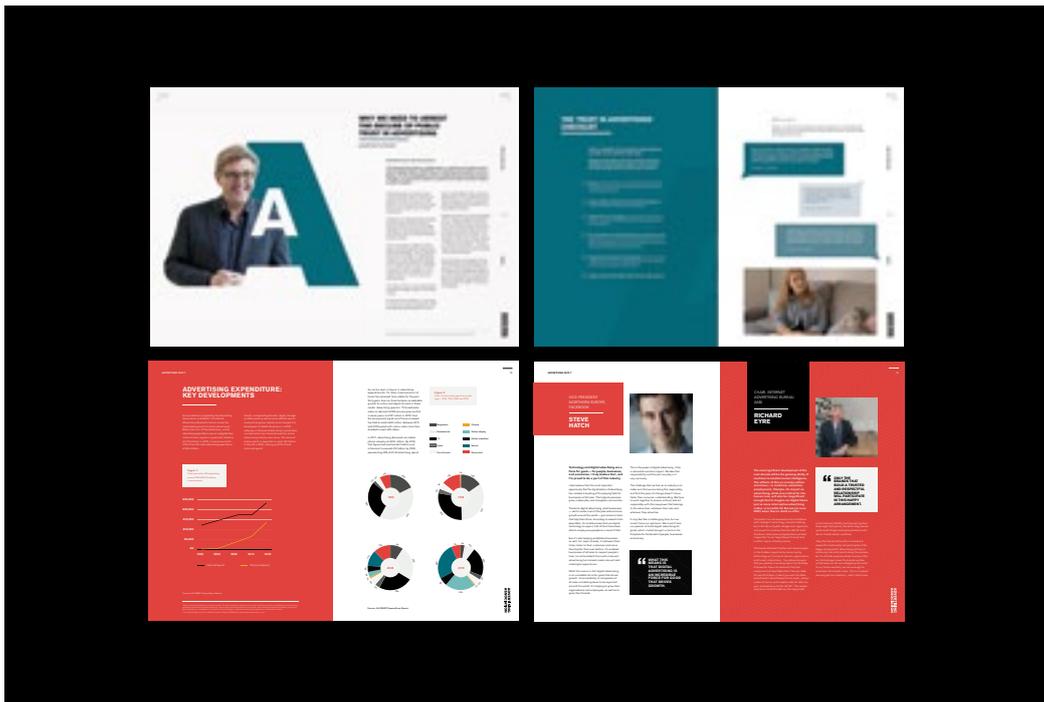
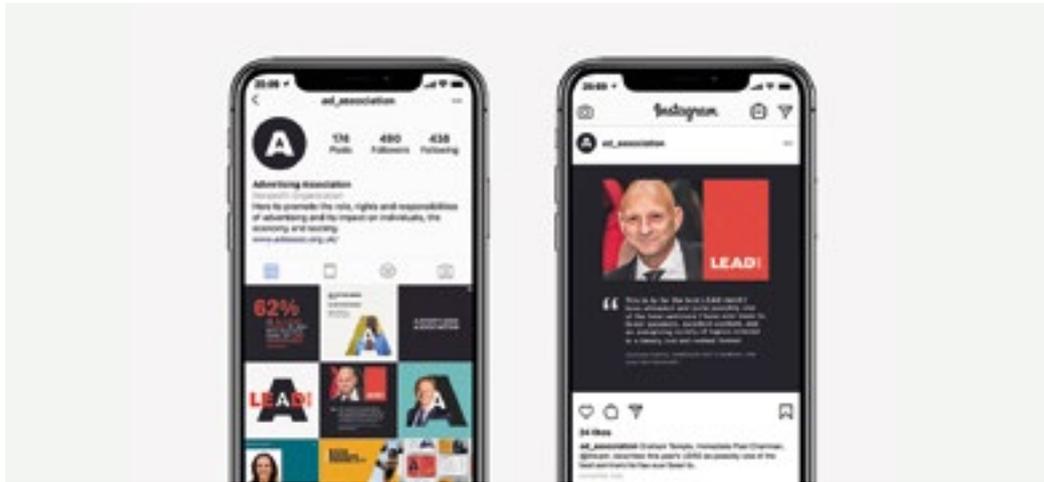
**ADVERTISING
ASSOCIATION**

**FRONT
FOOT**

LEAD 2019
A

CREDOS
UK Advertising's
Think Tank

**MEDIA
BUSINESS
COURSE 2019**



**Cannes Lions 2019.
Hello from the Brits.**





欢迎

China/Britain International Brand Forum

Friday 6 March 2019

国际品牌论坛
日期

WORLD WITH THE

UNITE THE WORLD



GROWING EXPORTS OF UK ADVERTISING AND MARKETING SERVICES

The UK is a world-leader in the advertising industry. It has a unique combination of critical mass, creative expertise and the know-how to serve a global client base. Throughout 2019 we and our industry partners were active in seeking opportunities to develop new markets and to champion exports of UK advertising and marketing services - from Shanghai to Texas and from Cannes to Tokyo.



THE GLOBAL HUB FOR THE WORLD'S ADVERTISING INDUSTRY

JAMES MURPHY

UK Advertising Exports Champion

I believe British advertising is the best in the world. We have an unparalleled concentration of expertise, ideas and creativity - a critical mass that has seen us establish the position as a leading global hub for our industry. Exports of advertising services reached £6.9bn according to the latest available figure – an increase of 18% on the year before.

But we live in uncertain times. The global economic and political headwinds mean that no industry can afford to rest on its laurels. Complacency is the enemy of innovation and success.

That is why the British advertising industry – in the form of our Promote UK group under the leadership of the IPA's Janet Hull – has been championing our capabilities on the world stage throughout 2019, from Texas to Tokyo, from Shanghai to Seoul. The group supported more than 100 companies at major industry events around the world including this summer's Creativity Is GREAT campaign at the Cannes Lions International Festival of Creativity. It has also showcased the great work of organisations such as the APA and IPA in presenting our country's credentials to international customers.

But this is merely the beginning of our endeavours. We are launching the UK Advertising Export Group (UKAEG) to grow exports of advertising and marketing services around the world, support the international growth of companies in our industry and strengthen the UK's existing position.

UKAEG is an industry partnership with UK Government to accelerate profile and lead generation opportunities in key international territories including China, Japan, South Korea, North America and Europe. Our aim with the group is to support the international growth and exports of UK advertising and marketing services companies by 50% by 2023, in line with wider creative industries targets in the Government's sector deal.

“ THIS YEAR, WE ARE LAUNCHING THE UK ADVERTISING EXPORT GROUP (UKAEG) TO GROW EXPORTS OF ADVERTISING AND MARKETING SERVICES AROUND THE WORLD

This is a truly global marketing and business development drive for UK advertising through digital marketing and event-based activities that leverages the extensive opportunities presented by the Department for International Trade, wider UK government initiatives and UK embassies around the world.

Our mission is open to businesses right across our industry. I would urge any organisation wishing to grow its export revenues to join UKAEG, come and be an active part of our international showcase for the world's best advertising and marketing services hub.

CELEBRATING UK ADVERTISING'S EXPORT SUCCESS

March 2019 was a very special month for us and our partners from the Promote UK group, when we coordinated the biggest effort yet in showcasing the power of UK advertising services to international audiences.

Highlights of the month included trade missions to multiple international events and locations, such as the Shanghai International Advertising Festival, South by Southwest in the US, and the APA's Tokyo-London Forum 2019. The month also saw the launch of the annual search for UK advertising professionals to represent the country in the global Young Lions finals in Cannes.

A high point of the month was the launch of our first annual Advertising Exports Report at a special Leadership Breakfast at Ronnie Scott's during Advertising Week Europe. The report was produced by Credos using Office for National Statistics data and showed international trade in

the UK advertising services reached £6.9 billion in 2017. It also revealed that the UK exports more advertising services than it imports to the tune of £3.8 billion – Europe's largest trade surplus in ad services. The report went on to feature findings of a bespoke industry survey by Credos, which showed almost 90% of those surveyed generate income from overseas and almost two thirds participate in overseas events, such as trade shows and sales visits.

Janet Hull, Chair of the Promote UK group and Director of Marketing Strategy, IPA, said about Exports Month: "A tremendous amount of effort, from industry and from UK government, is coming together as we showcase UK advertising services around the world. I'm hugely proud of the work being done and believe that this is just the start of what we can all do as an industry to build a strong trading future for our creative industries."





MAKING WAVES AT CANNES LIONS

This year we took on the coveted role of UK Representative for the Cannes Lions International Festival of Creativity. The event takes place in the South of France each year and brings the creative world together for five days of learning, exhibiting and networking through a multitude of talks, events and awards.

As the UK Rep we are responsible for nominating UK judges for award juries, finding and supporting our six Young Lions teams and, most importantly, promoting the UK's participation to demonstrate our industry's creative excellence in advertising. This has proven to be a fantastic opportunity to showcase UK advertising on the world stage and we did it by teaming up with partners - the Department for International Trade, Channel 4, Clear Channel, Framestore, London & Partners, M&C Saatchi and Newsworks - to create a Team GB-style campaign under the banner of 'Creativity Is GREAT'.

Our Creativity Is GREAT campaign included two trade missions to Cannes, the first run by London & Partners which supported 20 high growth London-based adtech and martech businesses and the second by the IPA who brought a further 20 advertising agency SMEs to join us at the festival. We also supported over 80 UK advertising speakers on stage during the week, sourced a participant for the Roger Hatchuel Academy, backed many short-listed entries from companies across our industry and ran a UK Young Lions competition in order to find our six teams to compete against young creative talent from around the world.

In addition, we ran UK advertising's first-ever activation space in the Palais Piazza. M&C Saatchi and Framestore built a special Creativity Is GREAT photo booth that had real rain falling from the roof (yes, we brought British rain to the Riviera!) with a red, white and blue umbrella to keep all our delegates dry. During the week, our rainbox welcomed over 600 visitors from across 60 different countries.

Finally, our many Creativity Is GREAT networking events and talks took place in Le Jardin de Clear Channel and the Little Black Book beach, as well as further pop-up events at venues including the Channel 4 Villa.

Throughout the week we gathered people together to talk about rebuilding public trust in advertising and how to grow your business worldwide. We even brought the House of Commons to the beach in Cannes with a parliamentary style debate! In addition to this, we collaborated with our fellow Cannes Lions reps from around the world and held special events with delegates from other territories, including a China and UK Advertising Leadership Lunch and a UK-Korea Creativity Exchange.

We are delighted to be UK Representative for Cannes Lions 2020, along with the support of all our partners and are very much looking forward to showcasing UK advertising on the world stage once again.

GROWING OUR INDUSTRY'S EXPORT OF ADVERTISING AND MARKETING SERVICES

As we look to the new year ahead and seek to build on the success of Promote UK, the time has come to scale the proposition into a truly global marketing and business development drive for UK advertising.

We are launching the UK Advertising Export Group (UKAEG) to grow exports of advertising and marketing services around the world, support the international growth of UK companies in our industry and strengthen our position as a global advertising hub.

UKAEG is an industry partnership with UK Government, backed by a projected £1 million annual promotional budget to accelerate profile and lead generation opportunities in key international territories including China, Japan, South Korea, North America and Europe.

The aim of UKAEG is to support the international growth and exports of UK advertising and marketing services companies by 50% by 2023, in line with wider creative industries targets in the Government's sector deal and build on the UK's position as a global advertising hub.

The UK Advertising Export Group will do this through a combination of digital marketing and event-based activities across a calendar year, aligning key moments for the international advertising industry with the UK Government's own activities such as the Dubai Expo 2020 and the British presence at the Tokyo 2020 Olympics. It will also leverage the extensive opportunities presented by the Department for International Trade and UK embassies around the world.

The companies being invited to join the UK Advertising Export Group represent a broad selection of the talent and capabilities of the UK advertising and marketing services landscape.

If you are interested in joining colleagues from across UK advertising in promoting our industry on a global platform, contact AA Commercial Director, Sharon Lloyd Barnes to learn how at Sharon.LloydBarnes@adassoc.org.uk





Image: Ronan Harris, VP & MD of UK & Ireland, Google talks to AA President Keith Weed at LEAD 2019.

OUR NETWORKING AND EVENTS PROGRAMME

Events offer our members a forum to come together and discuss and debate the crucial issues at stake for our sector and to meet with colleagues from across industry. They also offer a valuable opportunity to showcase the very best of UK advertising both to industry as well as to the wider community. We increased our events programme in 2019 with new focuses in Cannes and Scotland building on the success of existing events including LEAD in London and our Media Business Course.

WHERE ADVERTISING MEETS POLITICS

To kick off the year, we held our eighth annual LEAD conference on 30 January at King's Place in London, which attracted a crowd of nearly 350 leaders from across the UK advertising industry. Chaired by broadcaster Mary Nightingale, LEAD 2019 focused on the themes of Trust, Trade and Transformation.

Our President Keith Weed set out his manifesto for the year ahead when he asked the audience to join the AA in a system change to rebuild public trust in our industry. Keith noted any break in trust undermines the messages we attempt to share through advertising and warned we are the point of "trust or bust" in our relationship with the public.

Minister for Investment at the Department for International Trade, Graham Stuart declared Government's support for increasing exports of UK advertising services, which has been a key area of focus for us and led to the creation of Exports Month in March and an annual Exports Report (*read more on page 46*).

Labour's Deputy Leader and Shadow DCMS Secretary of State Tom Watson provided a clear message to industry regarding advertising to

children, as well as the Opposition's view on the HFSS debate. He spoke about his own experience working in advertising, noting that while he loves and admires the industry he believes it should do more to restore trust and respect for the industry through the way it serves and speaks to the public.

"The words we use convey powerful stories... in a so-called post-truth world the need for clarity has never been more needed. Words are the currency of love and friendship... nations are bound and loosed by them" he said.

Other highlights from LEAD 2019 included Former US Presidential Advisor and Founder of H Robotics, Dr Pippa Malmgren, who shared her thoughts on how technology is transforming people's lives and their interaction with advertising at every turn. Panel sessions also took place consisting of representatives from businesses including The Guardian, Nationwide, WPP and Google, who discussed the rapidly-changing advertising landscape that has helped bring the issue of trust into sharp focus.





ADVERTISING TAKES CENTRE STAGE IN EDINBURGH

Scotland's £1.7 billion advertising industry was the focus of our inaugural LEAD Scotland summit held on November 14 at the National Museum of Scotland in Edinburgh. Kindly supported by STV, LEAD Scotland was billed as where the Scottish advertising industry meets politics and, as such, it had a unique focus on the country's advertising industry and its role in the Scottish economy and wider society.

Delegates included a mix of business leaders from across advertising, the media and brands, alongside policy makers and political opinion-formers, who all attended to hear a special programme on rebuilding public trust in advertising, the unique strengths of Scotland as an advertising market and how it can turbo-charge growth and entrepreneurialism in the country.

The event was chaired by our President Keith Weed and host for the day was STV North Newscaster Andrea Brymer. Key speakers included Minister for

Business, Fair Work and Skills, Jamie Hepburn MSP; STV CEO Simon Pitts; Mark Evans, MD Marketing & Digital, Direct Line Group; our CEO Stephen Woodford; Simon Watson, MD, Personal Banking, Royal Bank of Scotland; Editor of The Drum, Stephen Lepitak; Shona McCarthy, CEO, Edinburgh Fringe Festival Society; and Cat Leaver, Director, Brand Scotland.

Highlights included Keith Weed's keynote on the advertising industry's five-point action plan to restore public trust in advertising, Simon Watson's personal account of his experience rebuilding trust at RBS and in the wider banking industry, and Kenny Farquharson's view on the future of Scottish politics.

LEAD Scotland was a great success – we're looking forward to our return over the next 12 months.

Image left: Evan Davis of the BBC presents at LEAD 2019.

Image above: The Growth in Scotland panel at LEAD Scotland, with (L to R) Facilitator Stephen Lepitak, Editor of The Drum; Tanya O'Sullivan, Head of Advertising Regulation for Sales, Channel 4; Simon Pitts, CEO, STV; Anneli Ritari-Stewart, MD, iProspect; and Shona McCarthy, CEO, Edinburgh Fringe Festival Society.



DEBATING THE FUTURE OF UK ADVERTISING

On April 1, we hosted a special debate in Parliament to debate the motion that “Despite Brexit the UK will be the pre-eminent advertising hub on the world stage post-Brexit”. The event was organised by The Debating Group and, for the first time, jointly sponsored by the Advertising Association and the UK Chapter of the International Advertising Association. The debate was chaired by Ian Lucas, former Labour MP for Wrexham, who highlighted that advertising is a “very special industry”, mentioning his close relationship with the AA and the IAA.

Speaking in favour of the motion on our behalf were Steve Davies, CEO of the Advertising

Producers Association and Sarah Jenkins, former CMO of Grey London and now of M&C Saatchi. They were up against Matthew Bloxham, Head of EMEA Media, Technology & Telecom Research, Bloomberg Intelligence, and Sarah Taylor, Client Partner at Finch Factor.

After a lengthy debate with strong arguments from both sides and a final summary, it was then over to the audience for the final vote. In an incredibly close result, they voted against the motion, with the majority believing the UK’s position will be weakened post-Brexit. Time will tell, but we will continue to firmly make the case for the UK as the global hub for our industry.

UNLEASHING THE CREATIVITY OF ADVERTISING'S NEXT GENERATION

Our future as a global advertising hub is dependent on the young talent entering our industry, particularly the homegrown stars. With this in mind, we held a very special afternoon of events on January 30 to introduce young people from diverse backgrounds to the UK advertising industry and to the Cannes Lions International Festival of Creativity in our role as the UK Representative.

We wanted to show them all how they can unleash their creative potential and build an exciting career in the UK's most creative industry!

Over 240 young people aged 16-24 from organisations including Livity, The Brixton Finishing School and The Media Trust attended our event and heard from UK advertising leaders from the likes of M&C Saatchi, Framestore, Clear Channel and Channel 4, as well as attendees of the Roger Hatchuel Academy.

The talks were followed by a speed mentoring session where 20 of the UK's top advertising and media businesses including adam&eveDDB, VMLY&R, ISBA, Channel 4 and Little Black Book answered any questions our young people might want to ask about advertising and the industry.

Straight after this, we held a second gathering – a Cannes Lions Masterclass - for under 30s in our industry. This included a talk on creativity by Chairman of Cannes Lions, Phil Thomas; a session on how to win a Lion by James Murphy and another on what it's like to be a juror by Vicki Maguire. Delegates also received tips from previous Young Lions winner Tom Wordley.

To mark the end of a very busy day and to encourage friendly collaboration across our industry, we brought our under-30s together with the students to get to know each other better and talk about our favourite subject – advertising!



BRIGHTON ROCKS

Our annual Media Business Course (MBC) took place in early November at The Grand in Brighton. The MBC is firmly established as the place where over one hundred young industry practitioners get the opportunity to hear insights from industry leaders and experts on how the media planning world operates and compete to be the industry's best in a unique challenge set by a brand.

Not only did delegates hear from the highest levels of industry but they were also divided into syndicates and given a blue-chip client brief to devise a full media strategy, before pitching against each other in front of judges to become the coveted Media Business Course winners. Throughout this process they were guided by tutors and speakers who rank among the top strategic media talent in the UK – talent including Karen Blackett OBE, Country Manager at WPP,

Simon Daghish, Group Commercial Director at ITV, Alex Mahon, CEO of Channel 4 and Jehan Shah, Senior Industry Head, Google.

MBC alumni have gone on to achieve great success across advertising and media, from Chief Executive of ITV, Dame Carolyn McCall DBE, who attended the course in 1988, to Rachel Bristow, most recently Director of Partnerships at Sky Media and Grant Millar, now Global Lead at advertising agency Spark Foundry, to name but a few.

While only one syndicate was able to win the Media Business Course trophy, everyone came away with a richer understanding of the media landscape, many new industry connections and the first-hand knowledge of how to create a winning pitch.

“

I just wanted to say how amazing the MBC course was from start to finish. I genuinely don't think I'll go on a course as good as MBC for the rest of my career so for that I can only say thank you to the AA and everyone involved. An unforgettable experience!

JAMES BEESLEY
Senior Planner, MediaCom

“

The combination of extraordinary speakers and the hands-on experience of a real live brief which is judged by some of the best people in the business – there's nothing like it.

RICHARD EYRE
Chairman, IAB

MEDIA BUSINESS COURSE 2020

**THE INDUSTRY STANDARD
FOR EXCELLENCE**

3rd - 6th November 2020

If you would like to know more about our
2020 Media Business Course and to book tickets,
please contact events@adassoc.org.uk





Image: Conrad Bird, Director, Campaigns & Marketing at Department for International Trade speaks to guests at the AA President's Reception.

THE BENEFITS OF BEING ONE OF OUR MEMBERS

Our members are at the centre of all we do at the Advertising Association - they are what make us tick. We represent their interests and the interests of the wider advertising industry wherever and whenever we can. Being part of the Advertising Association and our Front Foot network brings members a host of benefits, enabling them to get the very best from their membership - from access to exclusive events, to bespoke Public Affairs advice and getting to have their say in the debate around areas of crucial importance to our industry.

WHAT IT MEANS TO BE AN AA MEMBER

We are unique in our industry in that we bring together the vast array of brands that use advertising to communicate with customers and drive their businesses, the agencies that create and buy campaigns, the commercial media that carry them and the tech companies that provide advertising solutions.

Members from across our industry speak with one voice to UK government and policy decision-makers to ensure advertising and communications is high on the business agenda, that we have support and understanding in Government and that responsible practice continues to earn the confidence of the public, regulators and policy-makers alike.

Our work is crucial to the long-term prosperity of any business where the freedom to create, sell or use advertising and marketing communications is fundamental to its success. Our members work together to share advertising's contribution to the economy and society and to provide research and expertise to inform public debate. We protect and promote the freedom to advertise, but to advertise responsibly, and members are able to support and help shape the industry's self-regulatory system through the ASA.

We are involved in a wide range of policy debates affecting the industry as a whole and across all media formats. By joining us, members have a place at this table, as well as access to the wider discussions and policy development by the industry as a whole.

We also collaborate closely with global trade body partners including the Federation of European Direct and Interactive Marketing (FEDMA) the International Advertising Association (IAA), the World Federation of Advertisers (WFA) and the American Association of Advertising Agencies (4As) in the US.

For more information on how to join the AA, contact Sharon.LloydBarnes@adassoc.org.uk



WHAT OUR MEMBERS SAY ABOUT AA AND FRONT FOOT



“

The AA is in a special position in that it is the only body that brings together all aspects of the industry. Whether advertiser, agency or media owner, we all come together to talk about the common concerns as well as the opportunities that we face. Collectively we can continue to build UK advertising into the global powerhouse that it is.

RONAN HARRIS

Vice President & MD of UK & Ireland, Google

“

Front Foot is the enabler that connects the industry together - creates one voice and a movement we can get behind. It creates focus around the challenges we face and helps galvanise the industry.

KAREN STACEY

CEO, DCM



“

The AA does a fantastic job in representing our industry's interests and promoting the substantial contribution it makes to the UK economy. In an environment where people's trust in advertising has been called into question, this has never been more important.

We joined Front Foot in recognition of that and to add our support. We really value having a voice in and being part of such an important community.

TOM GEORGE

CEO UK, GroupM



FRONT FOOT

Front Foot is our industry's member network of over 50 businesses across UK advertising. It aims to promote the role of responsible advertising and its value to people, society and the economy through a coalition of senior leaders from advertisers, agencies and media owners.

Membership of Front Foot helps fund the work of Credos, UK advertising's think tank, including its recent Trust research and the Advertising Pays series, the latest of which investigates our industry's social contribution. Members also have access to events such as member dinners, such as the one we co-hosted with Google in May to preview the launch of Advertising Pays 7: UK Advertising's Digital Revolution.

Front Foot members have been at the forefront of activities aimed at increasing public trust in advertising and through events such as the Front Foot Breakfast at Jellyfish in April, they have had the opportunity to shape industry thinking in this area.

Membership also enables access to our Public Affairs briefings and regulatory advice. For example, briefings have been given to members on the

implications of the latest regulations, or the status of HFSS proposals, data protection and privacy and Brexit.

Our annual Parliamentary Reception is another moment for Front Foot members which brings them together with leading politicians and policy makers. Our next reception is due in March 2020 when we will look in more detail at the findings of the Advertising Pays 8 report.

The Front Foot network helps us shape our agenda and means members are at the forefront of the latest thinking and industry initiatives of value to their businesses.

For more information on how to join Front Foot, contact Sharon.LloydBarnes@adassoc.org.uk



MEDIA SMART'S GROWING INFLUENCE IN 2019

Media Smart is the industry's non-profit education programme and is proudly supported by the AA. It has been running since 2002 with a mission to ensure that every child in the UK aged 7-16 can confidently navigate the media they consume. This includes being able to identify, interpret and critically evaluate all forms of advertising.

Media Smart provides free teaching resources and parent guides on subjects like social media, digital advertising and body image. These are delivered in the classroom, assembly or at home. 2019 saw Media Smart hit the milestone of 57,000+ downloads of these materials since the programme was re-launched five years ago.

It's been a big year for Media Smart with a stunning brand refresh, launch of a new website and its most innovative educational campaign yet on Influencer Marketing. The film-based resource was created off the back of research by Credos which highlighted that 74% of parents think industry has a role to play in educating young people about this form of marketing.

Media Smart now has 25 industry partners with new members joining to support the influencer marketing campaign including the ASA, youth content marketing agency The Big Shot, and

influencer marketing agency Pepper Studio. The influencer marketing resource aims to help young people understand the commercial link between social influencers and the brands they may be promoting.

It is the first of its kind to tackle this area of marketing and features popular youth influencers like Hannah Witton who volunteered their time to create short videos talking directly to 11-14 year olds. They explain what influencer marketing is, why brands use it, and its regulations. There is also a big focus on how to critically evaluate social media content, how to identify paid for promotions/adverts and the use of airbrushing and filters in content.

Media Smart's Public Affairs activity has increased, with a week-long exhibition in the Scottish Parliament. This culminated in an event with Parliamentarians and Scottish industry announcing the programme's influencer marketing work. Media Smart also took part in the AA's Ad Pays 7 Showcase in Westminster and on 10 July AA Senior Public Affairs Manager David Henderson gave evidence to the House of Commons Women and Equalities Committee inquiry into the mental health of men and boys. Other witnesses included Martin Robinson, Editor and Founder of The Book of Man and Simon Gunning, CEO of the charity CALM (Campaign against Living Miserably).



“ **Social influencers have an important responsibility to help children identify whether what they are seeing is an advert or not. This is even more critical when it comes to crucial issues like body image and promoting body positivity. Young people need to be educated about this and understand what they see isn't always real.** ”

HANNAH WITTON, INFLUENCER,
BROADCASTER AND AUTHOR



We know young people have some understanding of the commercial relationship between brands and influencers, but we also know there are significant gaps in their knowledge of what has become an everyday part of their lives. Our objective is to help children fill in these gaps to ensure they build their digital and media literacy and ultimately their emotional resilience. When putting together these resources, it was clear that the best way to educate them was through youth influencers themselves. I would urge any brands that work with influencers to join us in our mission and help make children social influencer smart.

RACHEL BARBER-MACK, DIRECTOR,
MEDIA SMART



MediaSmart
Education from the Advertising Industry

The Committee raised a range of issues relating to men's mental health, the influence of gender stereotypes in advertising and the media, and the importance of media literacy among young people. David emphasised Media Smart's activity in increasing awareness of how images are portrayed online and how young people can spot what is sponsored content in social media posts and what is not.

The team is currently beavering away on a creative resource for secondary schools to support the ITV-led 'Eat Them to Defeat Them' vegetable campaign. This will see Media Smart encouraging

and signposting careers in the creative industry for the first time. The launch of this campaign is encouraging new industry members and ties in with LEAD 2020 and its theme of advertising's social contribution. This theme will continue at a roundtable event in Q1 2020 at Westminster where they will be promoting and discussing what industry is doing to support young people's well-being.

To find out how your organisation can support Media Smart with this work, please contact Rachel Barber-Mack, Director of Media Smart at mediasmart@adassoc.org.uk

MEDIA SMART MEMBERS

Advertising Association
ASA
BTHA
Channel 4
DMA
Facebook
Ferrero
First News
Generation Media

Google
IAB
IPA
ISBA
ITV
Lego
L'Oréal
McCann Worldgroup
Pearl & Dean

Pepper Studio
The Big Shot
Sky
SuperAwesome
Viacom



Image: Front Foot Chair Mark Evans speaks at LEAD Scotland

SHOWCASING THE LEADERS OF OUR INDUSTRY

The Advertising Association is able to draw upon the expertise, knowledge and guidance of its leaders, who include some of the most influential names in advertising. From our President Keith Weed, - twice named by Forbes as the world's most influential CMO - to AA Chair and CEO of PHD Worldwide, Philippa Brown; and Front Foot Chair and Direct Line Group MD of Marketing Digital, Mark Evans, to Credos Chairman James Best and our Export Champion James Murphy.



PUTTING OUR INDUSTRY ON THE FRONT FOOT

MARK EVANS

Chairman, Front Foot

Front Foot is a very special club for the leaders of the UK advertising industry. It brings together members from across advertisers, media owners and agencies. Our members provide the funding for the crucial work of UK advertising think tank, Credos, and a strong set of ambassadors to ensure that advertising's future is strong and vibrant.

Front Foot includes every part of the UK advertising industry, united to build evidence, drive engagement and advocate advertising's contribution to the economy, to society and to people. Credos consistently delivers ground-breaking research to explain our industry's contribution to the country's economic and cultural life.

2019 was the year in which our mission to increase public trust in our industry took centre stage. As Front Foot Chairman, this is an issue close to my heart. I believe that, as professionals in the advertising and marketing industries, it is vital we renew and restore the bond between brands and the consumer.

This can only happen if we work together as an industry. In April, we held a breakfast event at Jellyfish's office in London for members to look at the factors behind this declining trust in advertising and to come up with strategies and plans to improve this. We continue the work on our action plan to restore this lost trust, and the Credos team has taken its associated research on tour, presenting on the issue to hundreds of people at over 35 different companies.

But public trust isn't the only area where our work has been focused this year. We have also supported the launch of Advertising Pays 7: UK Advertising's Digital Revolution – a unique look at what the impact of technology has done to the shape and size of our industry. Front Foot members were treated to an exclusive preview at a dinner in partnership with Google UK in May, before the official launch at IAB Engage in June.



THE FRONT FOOT TEAM HAS PLANNED A SUPERB SCHEDULE OF EVENTS FOR THE YEAR AHEAD IN SUPPORT OF THE WORK OF CREDOS AND THE AA'S WIDER PLANS

Looking ahead, 2020 will be the year where we look to promote advertising's social contribution and the way our industry adds so much to the life of our country. This impact can come through charity initiatives, donated inventory, public health campaigns or a wide variety of other ways. As an industry, we will also be looking closely at the issue of climate change and the role that advertising can play in creating a more sustainable future for our world.

The Front Foot team has planned a superb schedule of events for the year ahead in support of the work of Credos and the AA's wider plans to address the decline of public trust in advertising. To all our members, I look forward to seeing you at one of these events soon – Front Foot is your forum for debate, engagement, and networking.

Finally, if you would like to know more about Front Foot and how you can get involved, we would love to hear from you!

For more information contact:
Sharon.LloydBarnes@adassoc.org.uk



CREDOS 2019

JAMES BEST

Chairman, Credos

Credos was 10 years old last year. Advertising's think-tank, inspired by Tim Lefroy, funded by Front Foot's generous backers and led almost since its inception by Karen Fraser, has matured over the decade to provide the UK advertising industry with a unique resource.

Seeking to understand and improve advertising's relationship with individuals and society, Credos is probably best known for the Advertising Pays series. Envied and emulated internationally, it has measured, analysed and communicated the many ways in which our industry benefits the people, businesses and economy of the UK.

Advertising Pays 7, 2019's publication, looked at the 'Digital Revolution' that has transformed advertising over the past twenty years: its nature, impact on consumers and business, and its implications for the future. As well as the many benefits brought by digitalisation, the challenges arising from the UK's transition to an online society often highlight advertising's role and responsibilities.

But there is a lot more to our work.

In 2019, we focused on trust. Public trust in advertising – whether in the ads themselves or the industry as a whole – appears to be in long-term decline. Or so our annual tracking study suggests. We may not be alone in this, as trust in institutions more widely has diminished over time, but our business has done badly and it matters. For advertising to be effective, it has to command a degree of credibility and trustworthiness. That's why the industry pays for the ASA, the world's leading ad-regulator, to ensure that UK advertising is 'legal, decent, honest and truthful' – in a word, responsible. Declining trust implies declining effectiveness.

Credos' extensive research, conducted for a pan-industry working group chaired by the CEOs of ISBA and the IPA, has generated a comprehensive action programme addressing issues such as bombardment, excessive frequency, personal privacy and support for the ASA's communications campaign. It has also proved a popular and compelling topic for presentations and seminars across the industry: people in our business really do care about the work they do and how people respond to it.

That is a long-term programme to address a long-term problem. As a part of the on-going effort to

navigate the industry through Brexit, Credos sought to investigate the industry's preparedness for a No-Deal Brexit. During late September, AA Members were surveyed to build an understanding of what sort of efforts and support systems would be needed to prepare for a No-Deal Brexit. Results from the survey underscored the uncertainty and anxiety within the industry regarding a No-Deal Brexit, which is negatively shaping how the industry is preparing.

We have also contributed to advertising's 'timeTo' initiative, addressing the very real and present problem of sexual harassment in the industry by providing new research into sexual harassment experienced by those working within timeTo endorsing organisations, and supporting the launch of a new toolkit and training pack created to help businesses eradicate this problem.

Looking ahead to 2020, Credos will be as busy as ever. Advertising Pays 8 will consider advertising's positive role in promoting societal change in attitudes and behaviour – towards health and well-being, safety, equality and diversity, charitable causes and the environment, amongst others.

And on the topic of the environment and the challenge of rapid climate change, Credos will produce an analysis of the advertising industry's actions and policies to combat further damage.

Advertising's contribution to the UK's world-beating creative services is another topic of Credos' investigation this year. Producing ad campaigns means hiring creative resources of every sort – writers, photographers, film-makers, animators, actors, vloggers, web designers, printers... the list is long – and as the world centre of advertising production, the UK has many of the very best. The value, growth and export worth of this ad-fuelled talent base will demonstrate another way in which our industry benefits society and the economy.

Keep your finger on Credos' pulse by following @CredosThinks on Twitter and via our LinkedIn page.

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MEMBERS

AA

AOP	Google	Professional Publishers
Amazon	IAB	Association
APA	IPA	Radiocentre
CAA	IPM	Royal Mail MarketReach
Channel 4	ISBA	Sky
COBA	ITV	Spotify
DMA	MAAG	Twitter
Discovery Communications	Microsoft Advertising	Viacom
Europe	MRS	Verizon Media
Facebook	News Media Association	
Global Radio	Outsmart	

FRONT FOOT

adam&eveDDB	Guardian News and Media	Ogilvy
Barclays	Havas Media Group	OMD
BBH	IPA	Posterscope
Britvic	ISBA	Publicis
BT	ITV	Royal Mail
Camelot UK Lotteries	Kantar	Saatchi & Saatchi
Carat	Kinetic	Sky
Channel 4	Leo Burnett	Talon Outdoor
Clear Channel	LinkedIn	The Specialist Works
DCM	Lloyds Banking Group	the7stars
Direct Line Group	M&C Saatchi	Vizeum
DMG Media	Mars	VMLY&R
ENGINE	McCann London	Warc
Essence Global	McDonald's	Wavemaker
Generation Media	MediaCom	Wunderman Thompson
Google	Mindshare	Zenith
Grey London	Nationwide Building Society	
GroupM	News UK	

AA SCOTLAND

Front Page	Republic of Media
Lane Agency	Story UK
Leith Agency	STV
MediaCom	

BOARD AND COUNCIL

AA BOARD

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 Paul Bainsfair, IPA
 Philippa Brown, PHD Worldwide
 Chris Combemale, DMA
 Ronan Harris, Google
 Kathryn Jacob, Pearl & Dean
 Siobhan Kenny, Radiocentre

Saj Manzoor, McCann
 Owen Meredith, PPA
 Jon Mew, IAB
 Sebastian Munden, Unilever
 Phil Smith, ISBA
 Kelly Williams, ITV
 Stephen Woodford, AA

AA COUNCIL

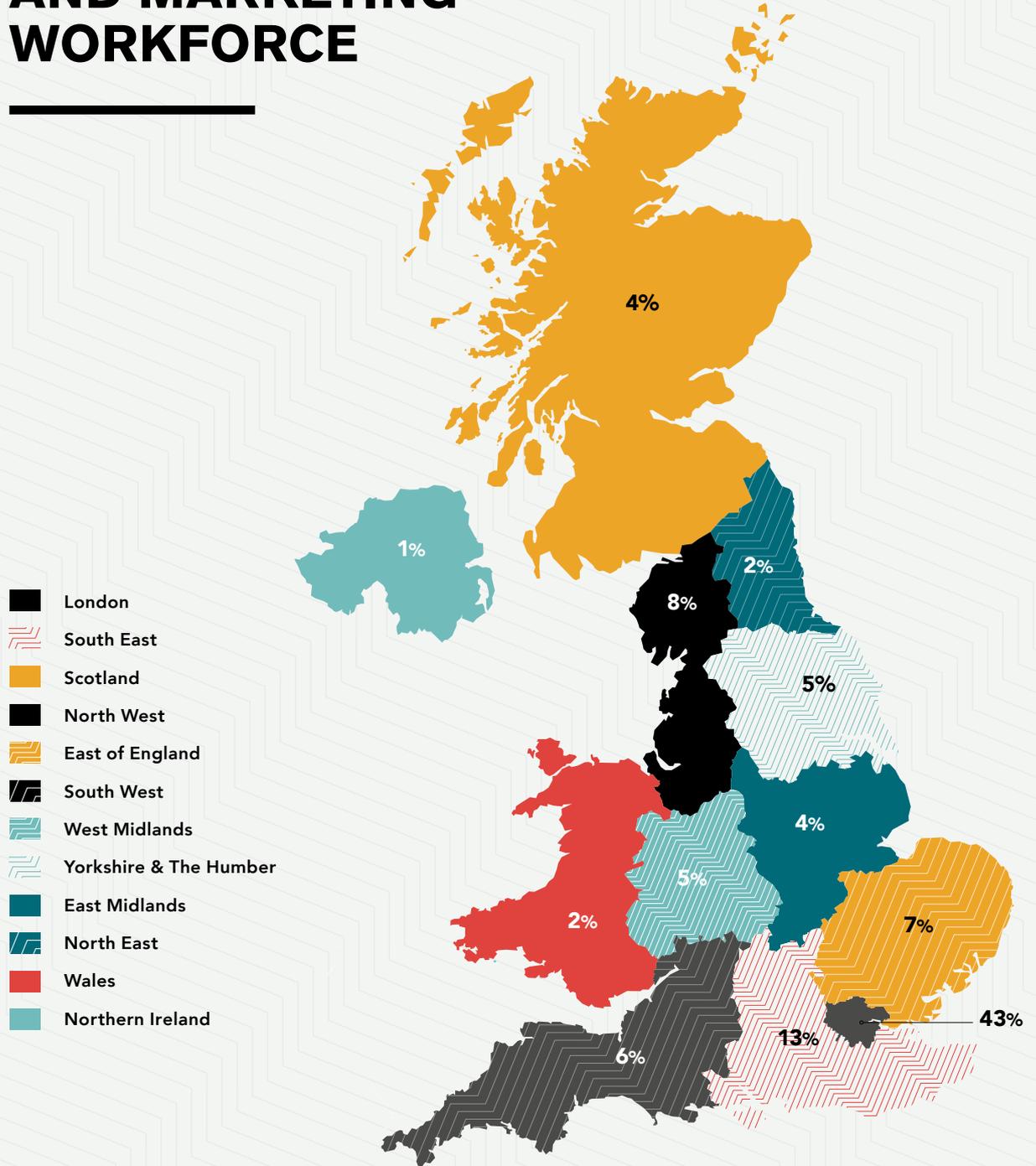
Jonathan Allan, Channel 4
 Rakesh Patel, Spotify
 Lynne Anderson, NMA
 Paul Bainsfair, IPA
 James Best, adam&eveDDB
 Lord Guy Black, Telegraph/NMA
 Brian Coane, The Leith Agency
 Chris Combemale, DMA
 Katie Coteman, Discovery
 Steve Davies, Advertising Producers Association
 Mark Evans, Direct Line Group
 Richard Eyre, Internet Advertising Bureau
 Elizabeth Fagan, Boots UK/ISBA
 Jane Frost, Market Research Society
 Mike Gordon, Global
 Steve Hatch, Facebook
 Caleb Hill, Amazon
 Mark Howe, Google
 Kathryn Jacob, Pearl & Dean
 Phil Jenner, Viacom
 Siobhan Kenny, Radiocentre
 Milka Kramer, Bing UK

John Litster, Sky Media
 Tim Lumb, Outsmart
 Mark Lund, McCann Worldgroup UK
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 Jon Mew, IAB
 Adam Minns, COBA
 Clive Mishon, MAAG
 Sebastian Munden, Unilever
 James Murphy, UK Advertising Exports Champion
 Dara Nasr, Twitter
 Mark Runacus, Chair of DMA
 Karen Stacey, DCM
 Phil Smith, ISBA
 John Sylvester, IPM
 Nigel Vaz, Publicis Sapient/IPA
 Keith Weed, Unilever
 Anna Watkins, Verizon Media
 David Wilding, Twitter
 Kelly Williams, ITV
 Stephen Woodford, AA

OUR MISSION

To promote the role and rights of responsible advertising and its value to people, society, businesses and the economy.

THE UK ADVERTISING AND MARKETING WORKFORCE



Top ten city hubs for employment in advertising and marketing:

London	43.0%	Bristol	1.6%
Manchester	3.1%	Brighton	1.5%
Birmingham	2.2%	Edinburgh	1.3%
Leeds	1.9%	Guildford	1.3%
Reading	1.7%	Glasgow	1.2%



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