

# **LEAD** 2023 **SCOTLAND**

## **SESSIONS SUMMARY**



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**Session:** Welcome from the Advertising Association

**Speaker:** Sharon Lloyd Barnes, Commercial Director, Advertising Association

**Summary:** Hailing the return of LEAD Scotland to Edinburgh, Sharon Lloyd Barnes illustrated the rapid transformation seen by the audience since it last met in November 2019 – reflecting on the political changes and how the advertising industry rose to the challenge of a global pandemic. She also shared the latest findings around employment in the Scottish advertising sector from Scottish economic consultancy BiGGAR Economics and outlined the AA's mission to attract and retain talent in the ad industry.

**Key Take-Aways:**

1. The Scottish advertising sector is estimated to support over 42,000 jobs across the economy.
2. Jobs in Scottish advertising agencies have fallen from 4,500 in 2015 to 3,000 in 2021 and jobs in media agencies have fallen from 700 to 400 across the same period.
3. However, advertising employment across Britain has increased by 4% over the same period, with the Northwest of England particularly increasing its share of jobs.
4. Between 2015 and 2021, the two creative hubs largely remain the same with Glasgow City accounting for 42% of total advertising employment and Edinburgh City 31% in 2021.
5. There is an opportunity for Government and industry to work in partnership and help maintain a vibrant market for Scottish advertising talent.
6. We'll continue to undertake ongoing analysis on talent, in consultation with our Scottish members.

**Session Length:** 5 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** Championing the Creative Industries in the UK

**Speaker:** Damian Collins OBE MP – Former Chair of DCMS Select Committee and Former Minister for Tech and the Digital Economy

**Summary:** Damian Collins OBE MP, who began his career in the advertising industry at M&C Saatchi, talked about the influence, strengths and opportunities for the creative industries. He shared thoughts on the future of self-regulation, the challenges of disinformation, and the debate on public service broadcasting and its funding. He noted the advertising industry is a creative jewel in the crown of the UK's economy and provides the UK with a truly global presence. He also talked about the future opportunities to become a world leader in advertising technology, provided we embrace it with a robust self & co-regulatory system.

**Key Take-Aways:**

1. We need to think about the financial model of how public service broadcasting is funded as the media landscape continues to widen.
2. We can better support the industry's self & co-regulatory system by making sure it can successfully navigate and respond to ad-tech.
3. It is crucial to promote clear definitions and guidance and on what is illegal in advertising to make sure companies don't fall foul of the regulatory guidance.
4. Be cognisant of whether ad campaigns are inadvertently helping to spread disinformation.
5. The UK is a hub for creativity, ideas and innovations are constantly around us as a society. It is up to our industry to tell these stories.

**Session Length:** 10 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** VIP Keynote Speech

**Speaker:** The Rt. Hon Gordon Brown

**Summary:** Delivering a keynote speech and 10-minute Q&A discussion, former UK Prime Minister the Rt. Hon Gordon Brown began by championing the advertising industry's world-renowned exports, ingenuity and creativity. Making clear the passion he has for tackling poverty through his Multibank initiative, Mr Brown outlined how companies with surplus goods can give them to people in need with the help of local organisations and a professional referral system – fighting both poverty and pollution. Mr Brown called for help from corporates to sell and promote his initiative and a wider call for advertising to take a role in convincing employers and the public that businesses are willing to do social good.

**Key Take-Aways:**

1. Tackling the surplus goods problem can bring a solution to poverty and pollution.
2. There is no point in telling negative stories all the time, we have to give people hope – unsolvable problems can be solved.
3. The advertising industry can help be part of the solution to society's major issues. There are plenty of opportunities to contribute to society.
4. Political advertising can be better regulated through reviewing party spending limits and improving transparency.
5. Guinness is Mr Brown's favourite ad campaign. He said he loved the story about the brand's plans to enlist the Pope to help take the brand globally through a retelling of the Lord's Prayer that included 'Give us this day our daily Guinness'.

**Session Length:** 30 minutes

**Session:** Political Panel

**Speakers:** Murdo Fraser MSP, Scottish Conservative Shadow Cabinet Secretary for Business, Economic Growth and Tourism; Foysol Choudhury MBE MSP, Scottish Labour Shadow Minister for Culture, Europe and International Development; Ben Macpherson, SNP MSP and Laura Alderman, Political Reporter, STV

**Summary:** In this cross-party political session, MSPs voiced their ideas on the future of the creative industries in Scotland and how they can be turbocharged. Ideas on retaining and upskilling talent and promoting Scotland as an advertising and production powerhouse were touched on. A debate on key policy areas such as alcohol advertising and the challenges they bring for the industry was had before a Q&A with contributions from the audience.

**Key Take-Aways:**

1. There is a consensus across the political parties to ensure creative industries receive investment and support.
2. Political parties need to recognise the talent drain where people are moving to England for what may be perceived as more secure jobs in the creative industries.
3. A thriving Scottish creative industry with well-marketed brands can help grow the economy and attract tourists from all over the world.
4. Asked on whether the industry can expect any advertising bans on specific problems, the unanimous response was we have to work in responsible partnerships with businesses to grow our economy.
5. Work with us – engage with your local MSPs to help make Scotland a better place.

**Session Length:** 30 minutes

**You can watch the full session on our YouTube channel [here](#).**

**Session:** The View on Scottish Politics

**Speaker:** Kenny Farquharson, Columnist and Senior Writer, The Times

**Summary:** Kenny Farquharson dissected the past, present and future of Scottish politics, reflected on the trend of the Scottish electorate voting for SNP in local, Scottish elections and Labour in UK wide elections, and considered the public's relationship with the SNP in Scotland. Disillusionment applied to all political parties in the current climate and Farquharson considered how legal turmoil and scandals in the media have fed into people's cynicism about politics. Will the old trend of Scots voting for Scottish Labour in UK wide elections return? Farquharson certainly thought so.

**Key Take-Aways:**

1. The Scottish electorate are considering their relationship with the SNP.
2. A return to the perceived trend of voting for the SNP in Holyrood and Scottish Labour in Westminster is on the cards.
3. Engage with Scottish politics to help create a better future for the creative industries.

**Session Length:** 25 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** What Drives Public Trust in Advertising? New Research

**Speaker:** Dan Wilks, Research Consultant, Credos

**Summary:** Credos has revisited its ground-breaking Public Trust in Advertising research for 2023 and in this session, Dan Wilks talked us through the new study – ‘What drives the public’s trust in advertising’. This follows work done by the AA to arrest the long-term decline in public trust in advertising – and there are signs of improvement since the industry’s low point in 2015. The study, which was led by Credos and conducted by research agency Craft, interrogated the drivers which most affect public trust as well as unpicked emerging themes by age group. Findings from the study will help inform the UK ad industry’s ongoing Trust Action Plan, which will be re-developed with AA members, for launch in early 2024.

**Key Take-Aways:**

1. Credos’ new research suggests three clear themes drive trust in advertising. Individuals’ responses to advertising are driven by their world view, media socialisation, and their personal definition of it.
2. The most significant trust driver is engaging and enjoyable creativity in advertising (importance score of 31/100) – so let people enjoy your advertising.
3. Advertising’s social contribution is the second most significant driver of trust, with an importance score of 10/100.
4. Meanwhile, ad bombardment remains the biggest driver of distrust, and its importance has increased significantly for younger audiences since the last study in 2021.
5. Awareness of the ASA increases levels of trust in advertising – so if you are a media owner or advertiser, consider what you can do to help support the next wave of our regulator’s awareness campaign.

**Session Length:** 20 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** Panel Discussion: Public Trust in Advertising

**Speakers:** Rachel Aldighieri, Managing Director, DMA; Simon Pitts, Chief Executive, STV; Gill Jarvie, Client Services Director, Republic of Media; IPA Chair for Scotland; Paul Bainsfair, Director General, IPA

**Summary:** This panel of industry experts discussed the latest Credos public trust results, delving into the importance of creativity in generating effective campaigns and exploring the issue of advertising bombardment – and how media planner and buyers can best navigate this. The speakers also looked at the development of TV advertising, and explored how, while viewing habits have changed, terrestrial broadcasting continues to be relevant. They reflected on the importance of advertising the ASA not just through one campaign but treating the awareness campaign as brand-building to reinforce its role.

**Key Take-Aways:**

1. Credos' public trust results show clearly that data and creativity are linked.
2. Ask yourself the question: when does frequency become bombardment? Audiences may have different perceptions to ad folk. Repetition annoys your target audience.
3. Reducing the ad load on your BVOD player may encourage people to watch more TV content.
4. Keep your eyes peeled for the next phase of ISBA's origin project which will help advertisers next year.
5. Everyone from across the ecosystem has got to make a change to improve the public's experience of advertising.

**Session Length:** 30 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** Advertising's Social Contribution: The Vaccines Campaign

**Speakers:** Abigail Jones, Strategic Adviser to DG, International Federation of Pharmaceutical Manufacturers and Associations (IFPMA) and Brian Coane, Partner, Leith Agency

**Summary:** Leith Agency in Scotland supported the international #TeamVaccines campaign with the IFPMA. Leith worked on a campaign communicating the efficacy of vaccines, their safety and importance. #TeamVaccines has been adopted by over 50 IFPMA member companies and associations. Abigail and Brian explained how they worked together to create a brilliant campaign that people truly trusted in the face of adversity.

**Key Take-Aways:**

1. Advertising and the creative industries have a superpower: their ability to tell stories and create behaviour change for social good.
2. Campaigns can help combat vaccine hesitancy in populations that may be broadly doubtful about vaccine effectiveness.
3. Advertising can help future generations by communicating the power of organisations such as the IFPMA's mission.
4. Customers today want to see companies like Leith take positive social action – consider how could your agency work for a good cause?

**Session Length:** 25 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** Scotland's Role as a World Class Creative Hub

**Speakers:** Marie Owen, Founder & CEO, LS Productions; Dave Neilson, Producer & Owner, Filming Scotland; Lauren McLaughlin, Experience Partner, New Commercial Arts and Steve Davies, Chief Executive, APA

**Summary:** Industry leaders from across the Scottish advertising ecosystem sat down to debate and address the challenges that the creative industries face in Scotland. We heard about each business's story, any obstacles they have faced and exactly what Scotland has to offer the world. This session explored everything from the role of AI to what strategic decisions are needed to help promote Scotland as a world class creative hub.

**Key Take-Aways:**

1. If they don't know, they won't come – Scottish businesses need to promote themselves as hard as they can.
2. Scotland's incredible architecture, world-renowned products, and idyllic scenery make it an ideal place to create, shoot and produce advertising campaigns.
3. New creative agencies like New Commercial Arts are proactively sourcing talent from Scottish universities to strengthen its creative capabilities.
4. Employment in Scottish advertising agencies has dropped since 2015. This creates a knock-on effect for the entire creative industry ecosystem in Scotland.
5. AI needs to be embraced – it can speed things up and help us generate ideas quicker. The potential for it to turbocharge and contribute to the Scottish economy is huge.

**Session Length:** 30 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** The International Scale of Scotch and its Role in Marketing Scotland as a Global Brand

**Speaker:** Glen Gribbon, CEO, Bladnoch Distillers & Non-Exec Chair of The Cabrach Distillery

**Summary:** Bladnoch Distillers' Glen Gribbon, formerly Marketing Director of The Macallan, talked the audience through his passion for the whisky industry and how it adds immense value to the Scottish economy. With 53 bottles of Scotch Whisky exported every second in 2022, this vibrant export supports many rural communities through high-value jobs and distillery profits going back into local areas. Gribbon talked about how whisky businesses become successful tourist destinations, through visits to whisky estates, such as the Macallan Experience and the Cabrach Distillery visitor centre.

**Key Take-Aways:**

1. In 2022, the value of Scotch Whisky exports was up 37% by value to £6.2bn.
2. Pre-pandemic there were 2.26 million visits to more than 70 distilleries, and in 2019 £85m was spent by visitors. Since the pandemic, there has been a greater focus on the quality of visit rather than quantity of visitors.
3. Often the reward for the success of Scotch whisky has been more tax or more regulation.
4. Given the Scottish Government's proposals to restrict alcohol advertising and marketing, dropped earlier this year, Gribbon made the case for why this is an extremely significant industry to be supporting for Scotland.
5. The Scotch whisky industry is a strong example of marketing-led growth and a powerful promoter of Scotland as a brand.

**Session Length:** 25 minutes

You can watch the full session on our YouTube channel [here](#).

**Session:** Closing Remarks

**Speaker:** Stephen Woodford, Chief Executive, Advertising Association

**Summary:** Wrapping up, Stephen Woodford closed the summit with a call-to-action for industry and government leaders to take steps to back the Scottish advertising industry.

**Key Take-Aways:**

1. Our job is to work together through trade bodies to make the most of this fantastic industry in Scotland.
2. We need to *advertise* advertising.
3. Turn up: wherever you lie in the ecosystem – whether you are an advertiser, agency, media owner, production company – seek out your trade body and champion advertising.

**Session Length:** 5 minutes

You can watch the full session on our YouTube channel [here](#).

# LEAD 2023 SCOTLAND

With thanks to our partners



If you would like to know more about the work of AA  
Scotland, please get in touch with us.

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