

UK ADVERTISING EXPORTS REPORT 2026

ADVERTISING
ASSOCIATION



UK
ADVERTISING

UK Advertising Exports: In Numbers

1

£19.4bn

Total UK advertising exports
(2025) - confirmed ONS ITIS

2

#2

UK Global rank as advertising
exporter – after only the USA

3

5.2%

Growth in advertising exports
2024 to 2025

4

£5.5bn

Exports to USA -
largest single market (+33.6%
year-on-year)

5

£4.2bn

UK advertising trade surplus
(2025) - up 38% year-on-year

6

52%

Share of advertising exports
to EU27 - above all-services
average (37.2%)

7

£40M

New business opportunities
for UK agencies through
UKAEG in 2025

8

£31bn

Government creative
industries GVA target by 2035
(Industrial Strategy)

9

£380M

Government commitment
to creative industries in the
Sector Plan (2025)

Source: ONS International Trade in Services (ITIS) Q4 2025 data confirmed (released 24 April 2026); UKAEG Impact Report (2025); and the Creative Industries Sector Plan (June 2025).

Note: ITIS data are subject to revision by the ONS

Note: Advertising exports includes advertising, market research and public opinion polling. Advertising was combined with market research and public opinion polling in 2012 to align with global data standards. At this point in time, the latter represented 18% of the total.

Five Policies Which Could Boost UK Advertising Exports

- 1. SECTOR RECOGNITION**
Give advertising parity with screen and music in the government's export support infrastructure
- 2. ENGAGE ADVERTISING**
Actively signpost advertising and AdTech businesses to the government support that already exists
- 3. TALENT MOBILITY**
Extend talent mobility commitments to fit working in advertising. Strengthen the UK-US creative partnership
- 4. EXPORT ENABLER**
Recognise advertising as an enabler of all other exports
- 5. SUPPORT INNOVATION**
Make the existing innovation infrastructure accessible to advertising - close the CoSTAR and Innovate UK access gap



FOREWORD

Hello from UK Advertising

2026 is the year the Advertising Association turns one hundred. We have spent a century making the case that advertising, done well, is a force for good in the economy and in society. In this centenary year, with advertising named for the first time as a priority sub-sector in the UK's Modern Industrial Strategy, that case has never been more consequential. This report, using the freshly published ONS figures for 2025, is a key response to that moment.

The numbers for 2025 are good. Let us say that with pride

UK advertising is one of Britain's great export industries. In 2025, UK advertising services exports reached £19.4 billion - up 5.2% on the previous year, and more than four times the value of a decade ago. The sector's trade surplus widened to £4.2 billion, an increase of 38% in a single year. Exports to the United States alone grew by a third, to £5.5 billion. By the most important measures of international competitiveness, UK advertising sits second in the world, behind only the United States.

Export success is built on a strong domestic advertising sector

This export success is built on the foundations of a domestic industry firing on all cylinders. UK advertising investment reached £46.7 billion in 2025 - up 6.4% year-on-year, with AA/WARC forecasts projecting the market will reach nearly £50 billion in 2026. The domestic and international stories are inseparable: the depth of expertise, talent and infrastructure that makes the UK the world's most sophisticated advertising market is the same foundation from which our export success is built.

The UK advertising market is a critical engine of the economy - and the export data shows that engine performing internationally. Every pound of advertising export is a pound earned in a competitive global market, bringing value back to the UK and sustaining high-quality creative employment.

Advertising powers the export of all business sectors

UK advertising does not only export its own services - it powers every other sector's export success. When a British financial services firm scales into Singapore, when a UK university recruits internationally, it is almost always advertising and marketing expertise that makes the market entry succeed. This report demonstrates both dimensions: the direct export earnings in Section One, and the client stories in Sections Three and Four that show UK advertising enabling British brands to compete and win globally.

“
In our centenary year, the Advertising Association's founding mission - to make the case for advertising's value to society and the economy - has never felt more alive.
”

When the government's Modern Industrial Strategy sets a 2035 ambition to make the UK the best place in the world to make and invest in advertising, it is targeting an industry that directly serves the economic growth agenda at the heart of government policy.

The government's recognition of this is historic

The Creative Industries Sector Plan named advertising and marketing as a priority sub-sector for the first time. It committed to increasing DBT support for trade missions at Cannes Lions and SXSW and set a clear directional ambition for the decade ahead. We welcome that unreservedly. This report is our contribution to the evidence base, the case studies, and the specific policy asks that will determine whether UK advertising's current leadership position is sustained or gradually surrendered to better-resourced competitors.

New challenges for Advertising

The advertising industry is living through the most significant technological transformation in its history. Artificial intelligence is reshaping how creative work is conceived and produced, how media is planned and bought, how campaigns are measured. We believe there is a genuine opportunity to use AI to make advertising better - for clients and for audiences.

But the question of who captures the value from that transformation is not yet settled. UK advertising enters this period from a position of strength. Maintaining this value in the UK economy requires deliberate effort from this industry, and from the policy environment in which they operate.

This report launches at SXSW London in June 2026 and will be amplified at Cannes Lions as part of the UK Advertising Campaign. The policy asks set out are not a wish list. They are the specific, achievable actions that will determine whether the UK's extraordinary position in global advertising holds, grows, or begins to slip. We ask that they be read in that spirit.



STEPHEN WOODFORD

Chief Executive, Advertising Association



AISLING CONLON

International Director for UK Advertising,
Advertising Association



Introduction

The Biggest Export Story You've Never Heard

How UK advertising became the world's second largest advertising exporter

UK advertising had a remarkable year in 2025. Exports reached £19.4 billion - up 5.2% on the previous year, and more than four times the value of a decade ago. The sector's trade surplus widened to £4.2 billion, a 38% increase in a single year.

Exports to the United States alone grew by a third, to £5.5 billion. The EU remains a major market, with 52% of all UK advertising exports flowing there - well above the 37% all-services average.

By every measure that matters, the UK advertising sector is one of Britain's most successful export industries. It outperforms engineering, telecommunications, architecture, legal services and accounting in export value. In the global rankings, it sits second only to the United States.

This report announces those figures. The advertising sector has pride in these results - because the performance is genuinely exceptional. However, this report shows how sustaining it will require deliberate effort from industry and government alike.

Recognition for Advertising

In June 2025, the government published its Creative Industries Sector Plan and named advertising and marketing as a priority sub-sector for the first time in the history of UK industrial policy. It committed £380 million to the creative industries and set a 2035 ambition: to make the UK the best place in the world to make and invest in advertising. It is a clear signal that government understands what the data has shown for years - that UK advertising is not a supporting act to the wider economy, but a world-class export industry in its own right.

This report is the sector's substantive response to that recognition – with a focus on export. The figures published here are the evidence base for the Industrial Strategy's ambitions. They show a sector already delivering at the scale the government's 2035 targets require. The question is not whether UK advertising can be a global leader. The question is how we ensure it stays that way.

A period of genuine disruption

Celebrating strong numbers does not mean ignoring real headwinds. Artificial intelligence is transforming advertising at every level - how creative work is produced, how media is planned and bought, how campaigns are measured and clients are served. The changes are not incremental. Major holding companies restructured significantly in 2025. Creative agency employment in IPA member firms fell by 14% in a single year. More cuts are predicted for the future. The question of who captures the productivity gains from AI - and who is displaced by it - is live and unresolved.

The skills, infrastructure, talent and creative culture that built a £19.4 billion export industry are real assets in an AI-driven future. But strength is not destiny. The agencies and businesses that will lead the next decade are those investing now in technology and hybrid capabilities - AI-native workflows combined with the human strategic and creative judgment that no algorithm replicates. Better access to funding to support this innovation is a key demand. And the policy environment in which they do that investing will shape whether the UK emerges from this period as a winner or a bystander.

Two claims on the export agenda

UK advertising makes two distinct claims on the national export agenda, and this report makes both.

The first is direct. UK creative, production, media, strategy and technology businesses are winning work in every significant global market. The case studies in this report - agencies from around the UK - show the range and ambition of that international work. They are winning not because the UK is cheap, but because it is excellent.

The second claim is less visible but arguably more important. Advertising enables all other British exports. When a UK manufacturer enters a new market, it is almost always advertising expertise that makes the market entry succeed. The depth of that expertise - the combination of creative capability, data infrastructure, technology and strategic thinking is concentrated in the UK more than anywhere else in the world. This is a national asset. This report makes the case that it should be invested in accordingly.



Section 1

The Data: UK Advertising Exports in 2026

Where we are, where we've come from, and where the growth is



£19.4bn
Advertising exports
2025 - new record high



+5.2%
Ad Export growth
Year-on-year, 2024-2025



£4.2bn
Ad Trade surplus
Up 38% year-on-year



#2
Global ranking
Behind USA only

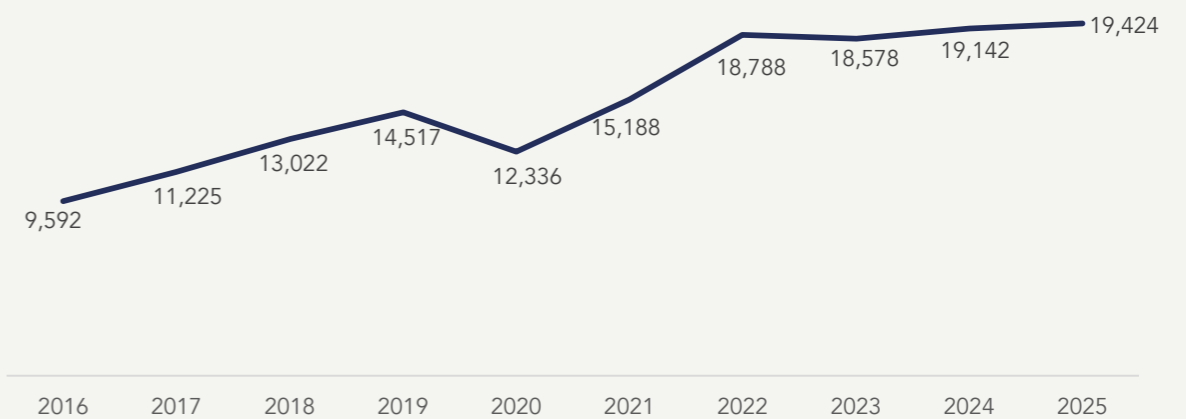
1.1 — Headline Export Performance

UK advertising delivered one of its strongest international trade performances on record in 2025. Exports of advertising, market research and polling services reached £19.4 billion - a new high - rising 5.2% year-on-year in current prices. At the same time, imports fell marginally, producing a trade surplus of £4.2 billion: up 38% in a single year, and the most significant improvement in the sector's bilateral trade position in recent memory.

These are not simply good numbers for the advertising industry. They are significant numbers for the UK economy. Every pound of advertising export is income earned in a competitive global market - and the 38% improvement in the trade surplus outpaces the equivalent improvement across all UK services trade, which grew its surplus by just 11% over the same period.

After adjusting for inflation, the value of advertising's exports has risen consistently over the past 10 years. The only exception being 2020 as a result of the Covid pandemic.

FIGURE 1.1.1 — THE DATA: THE VALUE OF UK ADVERTISING EXPORTS (£BN)



Source: UK trade in services: service type by partner country, ONS (Apr 2026)
Note: These data are subject to revision by the ONS. Figures adjusted for inflation using GDP deflators at market prices, and money GDP, HM Treasury (March 2026).

Good news on the UK's advertising balance of trade

The trade surplus between advertising's imports and exports grew 3.5x faster than the services average, reaching an impressive £4.2bn in 2025. This marks an increase of 38%, well above the 11% average for all UK services industries.

FIGURE 1.1.2 — TRADE SURPLUS: ADVERTISING VS TOTAL SERVICES, 2024–2025

	Advertising (10.2.2)	All UK Services
Trade surplus 2024	£3,043m	£184,008m
Trade surplus 2025	£4,209m	£204,518m
Surplus growth	+38.3%	+11.1%

Source: ONS ITIS Q4 2025. Advertising identifier 10.2.2. Total services = all categories.

This surplus story is a reliable measure of success.

The fact that both movements - rising exports and falling imports - happened simultaneously in 2025 is what produced the exceptional 38% surplus improvement. This combination is unusual: in most years, export growth is partially offset by rising imports. In 2025, advertising imports fell £201m (-1.3%) while the broader services import bill rose 5.8%. The import movements by market are examined in Section 1.2.

Against the broader services backdrop, UK advertising's export growth of +5.2% was slightly below the all-services average of +7.7%. But the surplus performance tells a different story: In absolute terms, the sector's £4.2bn surplus now represents 2.1% of the entire UK services trade surplus - up from 1.7% in 2024.

FIGURE 1.1.3 — UK ADVERTISING EXPORTS, IMPORTS AND TRADE SURPLUS, 2024 VS 2025

	<- Value (£bn)
Exports 2024	£18.5bn
Exports 2025	£19.4bn +5.2%
Imports 2024	£15.4bn
Imports 2025	£15.2bn -1.3%
Trade Surplus 2024	£3bn
Trade Surplus 2025	£4.2bn +38.3%

Source: ONS ITIS Q4 2025. Advertising identifier 10.2.2. Total services = all categories.

Second only to the US

The UK remains the second biggest global exporter of advertising services, extending the gap on the number three exporter, Germany, from just \$329m in 2018 to \$7.7bn in 2024. Prior to 2018, Germany's advertising exports outperformed the UK. However, the gap between the UK and the No. 1 exporter of advertising services, the U.S., increased significantly from \$4.1bn in 2023 to \$8.4bn in 2024.

FIGURE 1.1.4 - VALUE OF ADVERTISING SERVICES EXPORTS BY COUNTRY – TOP 5 EXPORTERS (\$ MILLIONS)

Time period	2016	2017	2018	2019	2020	2021	2022	2023	2024
United States	\$16,811	\$17,663	\$19,065	\$21,523	\$20,776	\$23,287	\$22,236	\$25,686	\$31,175
United Kingdom	\$9,561	\$10,810	\$13,240	\$14,478	\$12,996	\$18,621	\$19,276	\$21,567	\$22,820
Germany	\$9,749	\$11,716	\$12,911	\$13,154	\$11,314	\$11,641	\$12,854	\$14,251	\$15,108
Netherlands	\$4,100	\$4,431	\$4,472	\$7,509	\$11,314	\$7,615	\$8,823	\$12,592	\$13,372
France	\$5,680	\$6,299	\$5,696	\$7,201	\$6,340	\$7,597	\$8,218	\$7,546	\$7,815

Source: Trade in Services EBOPS2010, OECD (2026). Note: Data for China, Japan, and Singapore not available.

1.2 — Market by Market: Where UK Advertising Goes

The geography of UK advertising exports shifted significantly in 2025. The United States made the largest single-market gain on record; the EU held strong as the dominant collective market; Singapore surged; and Australia and Canada both saw double-digit declines. The market-by-market picture rewards close reading - both for the opportunities it signals and for the structural anomalies that require explanation.



Key Export Markets – Export Value

FIGURE 1.2.1 — UK ADVERTISING EXPORT MARKETS: VALUE AND YEAR-ON-YEAR GROWTH, 2024–2025

Market	2024 exports <-	-> 2025 exports	YoY %
EU27 total £10,103m	£9,306m	£10,103m	+8.6%
United States £5,514m	£4,126m	£5,514m	+33.6%
Netherlands† £1,960m	£915m	£1,960m	+114.2%
Ireland £1,426m	£1,482m	£1,426m	-3.8%
Germany £1,391m	£1,265m	£1,391m	+10.0%
Switzerland £1,060m	£888m	£1,060m	+19.4%
France £938m	£1,073m	£938m	-12.6%
Singapore £328m	£177m	£328m	+85.3%
Japan £230m	£189m	£230m	+21.7%
Canada £181m	£274m	£181m	-33.9%
Australia £121m	£181m	£121m	-33.1%
China £71m	£75m	£71m	-5.3%

Blue (2024 column) = 2024 value Gold = EU27 largest market Teal = 2025 growth Coral = 2025 decline Scale: 26 blocks = £10.1bn
 † Netherlands: exports more than doubled (+114%) in 2025, almost certainly reflecting a change in how one or more multinational groups route intercompany advertising billing through Amsterdam — consistent with the Omnicom-IPG merger (November 2025). This does not represent genuine market growth and is monitored in 2026 data.

United States: the defining story of 2025

A gain of £1.4 billion (+33.6%) makes the US the largest single contributor to UK advertising export growth in 2025 by a wide margin. At £5.5 billion, the US now accounts for 28.4% of all UK advertising exports - up from 22.4% in 2024. This is the bilateral relationship that matters most to the sector's international performance, and in 2025 it grew strongly. UKAEG's US programme - including UK House at Advertising Week New York and the Cannes Lions presence - is directly aligned with the market that most rewards investment.

EU27: resilient but uneven

The EU as a bloc grew exports 8.6% to £10.1 billion — 52% of the UK's entire advertising export base, well above the 37% all-services average.

However, the underlying picture is complicated by the Netherlands anomaly. Strip out Netherlands, and EU27 growth is markedly more modest. Germany (+10%) and Switzerland (+19.4%) are the genuine European growth stories. France (-12.6%) is the most significant European laggard and deserves attention: it is the UK's sixth-largest advertising export market and its decline cannot be attributed to the same structural factors that explain Ireland and Switzerland. The balance of 23 EU markets also show modest decline where we would expect these smaller markets to have more need to import the advanced technology and strategy offered by the UK's larger specialist businesses.

Singapore: the APAC signal. A near-doubling to £328m (+85.3%) - though off a modest base - is the clearest positive signal from Asia-Pacific. Singapore functions as the regional HQ for many global brands and holding company networks, and growing UK advertising exports into the city-state is consistent with the UKAEG APAC strategy. The trajectory, if sustained, would make Singapore the most important APAC market within two years.

Australia and Canada: an unexplained twin decline. Both English-speaking Commonwealth markets fell approximately 33% - Canada from £274m to £181m, Australia from £181m to £121m. These declines are striking in their symmetry. The most likely explanation is client-side consolidation among multinationals who manage UK, Australian and Canadian advertising through the same holding company structures, with a shift in how fees are attributed to markets. This will be investigated and monitored before either market is characterised as a declining opportunity for UK agencies.

Imports have fallen as exports have risen

TABLE 1.2.2 — UK ADVERTISING IMPORTS: KEY MARKETS, 2024–2025 (£M)

Import source	2024 (£m)	2025 (£m)	Change	YoY %	Note
World total	15,416	15,215	-201	-1.3%	Imports fell vs +5.8% all services
Ireland	3,223	2,534	-689	-21.4%	Platform/holding group billing hub
Switzerland	2,733	1,895	-838	-30.7%	Holding group intercompany hub
EU27 total	9,543	10,262	+719	+7.5%	EU imports rose overall
Germany	529	583	+54	+10.2%	Genuine supplier growth
United States	1,585	1,530	-55	-3.5%	Small improvement in bilateral balance
France	362	334	-28	-7.7%	Modest reduction
Japan	200	210	+10	+5.0%	Stable - large but strong domestic sector - culturally unique
China	122	108	-14	-11.5%	Low and declining - large market hard to enter - remains a target

Source: ONS ITIS Q4 2025, identifier 10.2.2.

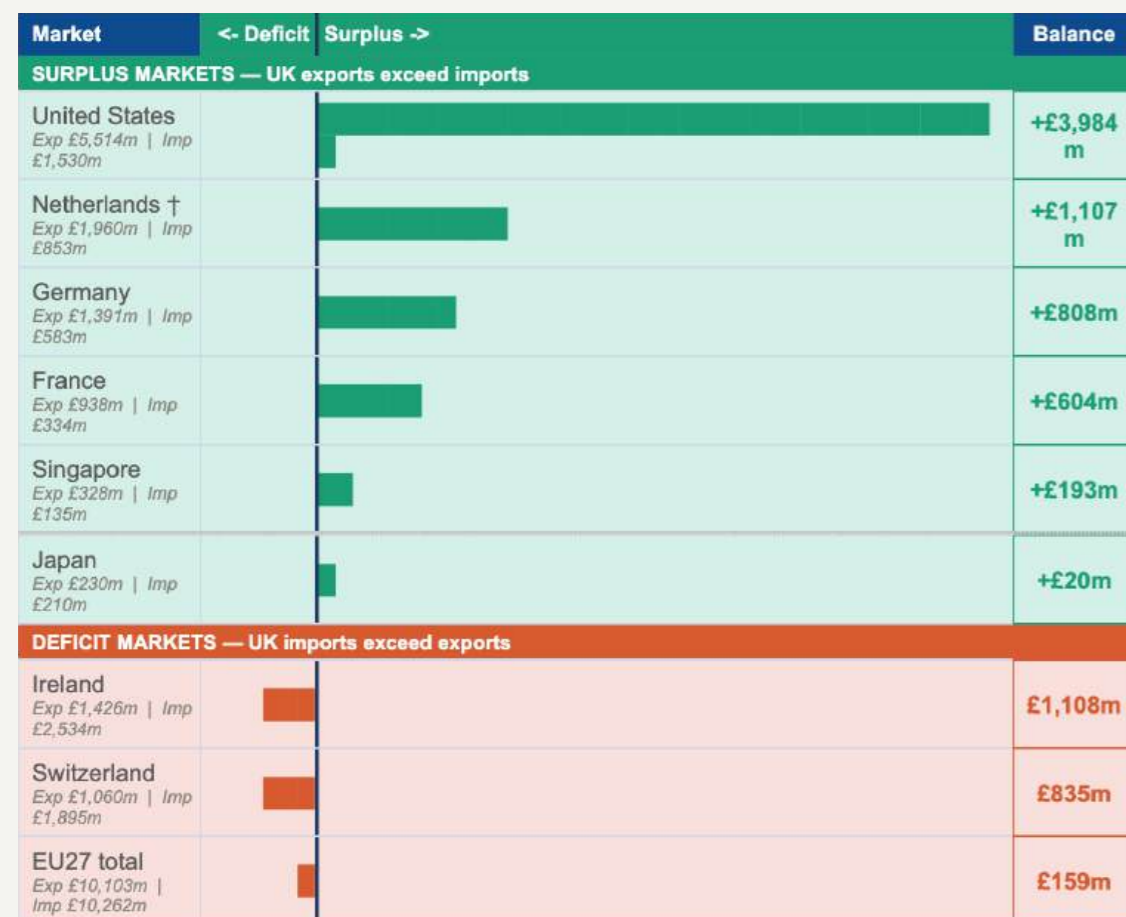
Why imports falling matters

The fall in UK advertising imports - from £15.4bn to £15.2bn - while total UK services imports rose 5.8% is the structural story beneath the headline surplus figure. Much of this reflects changes in how Ireland and Switzerland (combined: -£1.5bn) route advertising procurement - particularly the intercompany billing of global platform and holding group costs. Netherlands might be the balancing beneficiary. These are accounting movements, not genuine changes in the volume of advertising services consumed by UK businesses from overseas. The underlying bilateral position - strong UK export capability meeting moderate import demand - remains firmly positive.



Balance of Trade – Key Markets

FIGURE 1.2.3 — UK ADVERTISING TRADE BALANCE BY KEY MARKET, 2025



Source: ONS ITIS Q4 2025. Surplus markets (exports > imports) above the divider; deficit markets below. Bar length proportional to balance value — same scale both sides. Surplus bars run right; deficit bars run left of axis. † Netherlands: see editorial note.

Same scale both sides; bar length proportional to absolute balance. Max = USA +£3,984m (40 blocks). Exports and imports shown in small text within each row. † Netherlands: the apparent +£1,107m surplus reflects an anomalous export spike attributed to multinational intercompany billing changes, not genuine market growth. EU27 deficit (-£159m) is marginal and near-balanced.

What the data tells us

UK advertising exports reached a new record in 2025. The trade surplus grew faster than any comparable services sector. The United States delivered the single largest bilateral gain in the sector's export history. The EU remains the dominant collective market. Singapore signals APAC opportunity. The Netherlands figure requires qualification but does not undermine the overall story. Import changes are structural rather than behavioural. The data confirms UK advertising as a world-class export industry - and as the strongest-performing surplus generator among creative services.

1.3 — UK Creative Industries: Export & Import Comparison 2025

Advertising in context: how the sector performs against other creative industries

Advertising is the only creative sector outside computer services to run a £1bn+ and growing trade surplus. Its £4.2bn surplus compares directly against deficit positions in both Audiovisual, Film and TV (-£0.5bn, widening) and the broader cultural arts and music bundle (-£0.9bn, narrowing).

Audiovisual, film and TV - a sector that has received significant government production support - saw exports fall -6.8% in 2025, while advertising exports grew +5.2% with no equivalent direct subsidy. Architecture (+26% exports, +25% surplus) is the strongest growth story among smaller creative sectors. The picture overall is of UK advertising as the creative economy's most robust international performer.

Also note that AdTech is a major component of creative sector Computer Services. This should be recognized as a part of the digital advertising sector - but ONS did not offer an Advertising Technology classification at this time.

FIGURE 1.3 — UK CREATIVE SECTOR EXPORTS, TRADE BALANCE AND GROWTH, 2025

Creative sector (ONS)	<- 2025 export value	Trade balance	YoY growth
Computer Services (IT, software & games — 9.2)	£31.3bn	SURPLUS +£19,352m	+8.0%
Advertising, market research & polling (10.2.2) ★	£19.4bn	SURPLUS +£4,209m	+5.2%
Music, arts, design, crafts, publishing & museums (11.2) ‡	£7.6bn	DEFICIT -£942m	+49.0%
Audiovisual: film, TV, radio & photography (11.1)	£3.4bn	DEFICIT -£470m	-6.8%
Architectural services (10.3.1.1)	£1.1bn	SURPLUS +£978m	+26.0%

Source: ONS ITIS Q4 2025, released 24 April 2026. Ordered by export value. Bar proportional to 2025 export value. Balance badge shows trade surplus (teal) or deficit (coral). Growth badge shows year-on-year export change. @ = Advertising. † = Bundled ONS category. ★ Advertising highlighted in gold. ‡ ONS 11.2 bundles music, performing arts, visual arts, design, crafts, publishing and museums — sub-sectors cannot be individually identified; +49% growth figure should be treated with caution. ONS ITIS does not break advertising exports by sub-sector.

1.4 - Advertising in Context: Performance vs Total UK Services

UK advertising exports grew in 2025 - but how does that performance compare to the overall UK services sector? Measuring advertising against the all-services baseline reveals two distinct stories: export growth that broadly kept pace with the wider economy, and surplus growth that significantly outperformed it.

Surplus outperformance

Advertising surplus grew 38% against 11% for all services -- delivering 3.5x the surplus improvement of the wider economy in a single year.

Import advantage

Total services imports rose +5.8% in 2025. Advertising imports fell -1.3% -- the sector absorbed less foreign spend while growing its exports.

Share held

Advertising held a 3.6% share of total UK services exports in both years -- keeping full pace with the broader services economy.

Compared to total services there are some markets where advertising overperformed...

TABLE 1.4 -- ADVERTISING SHARE OF TOTAL UK SERVICES EXPORTS, BY MARKET

Market	Total svc growth	Adv growth	Adv share 2024	Adv share 2025	Change pp	Signal
World total	+7.7%	+5.2%	3.6%	3.6%	0.0	Held pace
United States	+5.9%	+33.6%	3.1%	3.9%	+0.8	Strongly outperformed
Germany	-0.7%	+10.0%	4.3%	4.8%	+0.5	Only gainer in market
Netherlands	+17.1%	+114.2%	4.1%	7.5%	+3.4	Structural anomaly
Switzerland	+18.0%	+19.4%	4.9%	5.0%	+0.1	In line with total
Singapore	+26.0%	+85.3%	2.1%	3.0%	+0.9	APAC outperformer
Japan	+0.2%	+21.7%	2.2%	2.6%	+0.4	Adv outperformed
EU27	+9.2%	+8.6%	5.0%	5.0%	0.0	Held EU share
Ireland	+15.7%	-3.8%	5.6%	4.6%	-1.0	Adv fell vs strong total
France	+2.9%	-12.6%	4.6%	3.9%	-0.7	Adv underperformed
Canada	+13.9%	-33.9%	2.7%	1.5%	-1.2	Adv collapsed vs total
Australia	+4.8%	-33.1%	1.5%	1.0%	-0.5	Adv collapsed vs total
China	+4.6%	-5.3%	0.6%	0.5%	-0.1	Negligible share

[*] = advertising outperformed total services. [+] = structural anomaly. Adv share = advertising exports as % of total services exports to that market
Source: ONS Trade in Services by Partner Country, Q4 2025, 24 April 2026. Identifier 10.2.2. Total services = all ONS service categories. Non-seasonally adjusted, current prices. Netherlands: see editorial note Section 1.2.

The structural takeaway

Advertising holds a 3.6% share of UK services exports globally - stable and consistent. But in the markets that matter most commercially (USA, Singapore, Germany) it is gaining share, while in corporate structurally complex markets (Ireland, Canada) it is losing it. The surplus story - +38% against +11% for total services - is the clearest single measure of the sector's competitive health in 2025.





Section 2

The UK Advantage: Why the UK Leads

2.1 — UK Advertising is Built on Creativity, Talent and Reputation

Research by PwC for the Advertising Association, published in 2020, identified creativity, talent and reputation as the core drivers behind the international success of UK advertising exports. Those strengths have helped drive more than a decade of export growth and continue to underpin the UK's global competitiveness today.

The structural advantages below help explain why UK advertising continues to lead internationally.

Creativity	<p>The UK's creative reputation is one of its greatest export advantages. UK advertising draws from a uniquely concentrated creative ecosystem spanning film, television, music, fashion, sport, gaming, design and experiential industries. These sectors are closely connected geographically and culturally in a way few other markets can replicate.</p> <p>UK agencies are also recognised internationally for effective strategic and creative innovation, producing work that travels globally and helps brands connect across markets and cultures.</p>
Talent	<p>The UK combines world-class homegrown creative education with a unique ability to attract international talent across advertising, media, production and technology. London in particular remains one of the world's most internationally connected creative markets, drawing diverse talent from across the globe. This blend of domestic and international expertise helps UK agencies produce globally relevant work that travels across cultures and markets.</p>
Reputation	<p>UK advertising benefits from the global reputation and soft power of wider British cultural exports including music, film, television, fashion and sport. The UK is internationally associated with creativity, innovation and cultural influence, giving UK agencies and creative businesses a strong platform for international growth. The English language and the UK's position between US and Asian time zones also create natural advantages for servicing international clients and campaigns.</p>
Ecommerce and Digital Leadership	<p>The UK is one of the world's most advanced digital advertising and ecommerce markets. High levels of online retail, digital media adoption and advertising innovation have helped UK agencies and AdTech businesses develop expertise that is increasingly exportable internationally.</p>
Integrated creative ecosystem	<p>UK advertising agencies operate within a highly integrated creative ecosystem spanning production, gaming, entertainment, design and immersive technology. This close collaboration enables UK agencies to combine creative, production and technological capabilities in ways few international competitors can replicate.</p>
AI, Adtech and innovation	<p>The UK's fast-moving technology and AdTech sector enables advertising businesses to adopt AI, data and emerging media technologies quickly. This ability to commercialise innovation at speed is becoming an increasingly important competitive advantage in global advertising exports.</p>

2.2 — AI, Disruption and the Createch Opportunity

The defining question for UK advertising exports over the next decade is not whether artificial intelligence will transform the industry, it already is. The opportunity for the UK is whether its agencies, AdTech businesses and creative technology companies can lead the commercialisation of AI-driven advertising services globally.

AI is reshaping production, media and workflow economics across the industry, but it is also creating significant new opportunities in effective strategy, creative orchestration, localisation, measurement and content systems. The agencies building these capabilities today are likely to define the next generation of UK advertising exports.

AI is accelerating structural change across global advertising, reshaping production, media buying and campaign delivery. The opportunity for the UK lies in commercialising high-value AI-enabled creative, strategy and production services internationally

FIGURE 2.2.1 — AI IMPACT ON UK AGENCY WORKFORCE: CURRENT AND 12-MONTH OUTLOOK



[*] = advertising outperformed total services. [+] = structural anomaly. Adv share = advertising exports as % of total services exports to that market. Source: IPA Agency Census 2025. Left of axis = already happened. Right = expected next 12 months. % of IPA member agencies.

The impact of AI is asymmetrical across the industry. Automated production and media workflows are increasing efficiency in some areas, while increasing the value of high-end creative, strategy, data and planning capabilities in others. This shift reinforces the importance of the UK's strengths in commercially led creativity, integrated production and AI-enabled advertising services, areas where the UK remains globally competitive. The export opportunity is increasingly moving toward high-value services that combine creativity, strategy and technology in ways that are difficult to commoditise.

The Createch Opportunity

The Creative Industries Sector Plan introduces "Createch", the fusion of creative innovation and technology, as an expected generator of £18 billion in GVA and 160,000 jobs over the next decade. UK advertising is already one of the leading Createch sub-sectors, though it is rarely framed that way. UK agencies are deploying AI and advanced technology across the full advertising value chain and exporting those capabilities internationally.

UK ADVERTISING CREATECH CAPABILITIES IN PRACTICE

Virtual production

Chrome Productions delivered the global reveal of the Ford F-150 Lightning using state-of-the-art LED virtual production, a top-secret automotive campaign without location risk. UK virtual production is a world-class export asset.

AI-driven localisation

UK agencies are using AI-assisted creative adaptation to scale campaigns across multiple markets and languages while dramatically reducing production timelines.

Cross-cultural data intelligence

UK businesses are building AI-driven advertising and measurement tools that help brands operate effectively across global markets and audiences.

Immersive and XR

Framestore and other UKAEG members are at the global frontier of XR and immersive creative, identified by the Creative Industries Sector Plan as the highest-growth Createch opportunity.

AdTech and measurement

UK AdTech businesses are building AI-driven advertising tools that compete globally with major US and European platforms. This is one of the fastest-growing areas of UK advertising exports.

The question for the Industrial Strategy

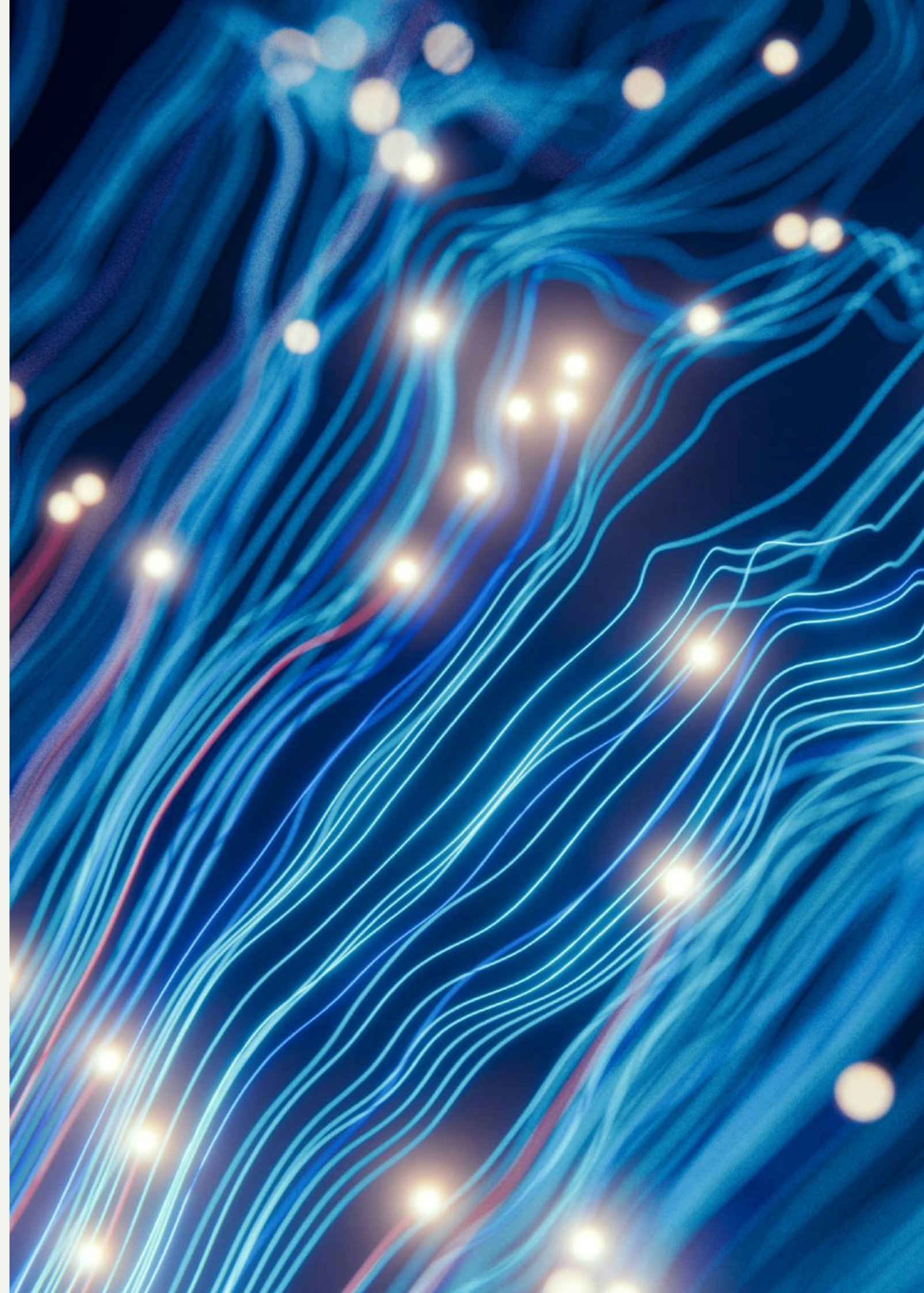
The UK advertising industry already has the foundations to become a global Createch leader: world-class creative talent, advanced data infrastructure and a £19.4bn export base. The question for industrial strategy is whether UK agencies building AI-native and Createch capabilities are supported to scale that innovation here in the UK. The policy asks in this report are designed to help ensure they are.

2.3 — Closing the Gap Between Advertising and Innovation

Advertising is one of the UK's strongest export industries, but many of the innovation systems designed for the creative industries remain difficult for advertising businesses to access. As the sector becomes increasingly driven by AI, Createch and advanced production technologies, improving access to innovation support will become critical to maintaining the UK's global competitive position.

COSTAR (£75.6M)	CoSTAR is the UK's national R&D network for creative technologies, developing capabilities in virtual production, immersive technologies and motion capture. Advertising agencies are major commercial users of these technologies across campaigns, production and brand experiences. CoSTAR is primarily structured around film, TV, gaming and live performance, leaving advertising with no clear route into its infrastructure. The access gap is structural, not intentional.
INNOVATE UK (MARCH 2026)	Innovate UK's new prospectus prioritises "deep and hard tech" businesses across key sectors, including Creative Industries. While directionally positive, advertising and AdTech businesses working in AI, measurement and data infrastructure can struggle to fit funding models designed primarily around science and engineering-led innovation. Existing support programmes are often too small for agency-scale innovation investment, and advertising businesses need clearer access routes into the support already available.
CREATIVE PLACES GROWTH FUND (£150M)	The Creative Places Growth Fund is devolved to six Mayoral Strategic Authorities and should explicitly include advertising agencies in its regional growth plans. Advertising is a major employer and exporter in regional economies, but funding has historically focused more heavily on sectors such as screen, music and visual arts. Advertising's role in regional growth remains under recognised.
TALENT AND VISA ACCESS	Advertising particularly production depends heavily on specialist international talent, including directors, VFX artists, producers and platform specialists. The UK's current visa framework is not well adapted to the short-term, project-based talent flows that global advertising production requires. This creates practical barriers for UK agencies delivering international campaigns and production work.

The ask is for advertising to be fully included within the innovation infrastructure that already exists from R&D funding and regional growth programmes to specialist talent and technology access. As AI, Createch and advanced production technologies reshape the industry, ensuring advertising businesses can access these systems will be critical to maintaining the UK's global competitive position.



Section 3

Advertising as the Engine of Global Business Growth

How UK agencies have helped brands conquer new markets

Advertising is not only a major export industry in its own right - UK advertising also helps brands and businesses in both the UK and around the world grow across international markets.

From global consumer brands to technology, entertainment and retail businesses, UK agencies help companies navigate cultural differences, build internationally relevant campaigns and scale across borders. The following case studies demonstrate how UK advertising expertise supports global business growth through creativity, strategy, production and innovation.



UK Advertising trade mission to Saudi Arabia, 2025. The mission brought together UK agencies and Saudi marketing leaders to explore partnership opportunities in one of the world's fastest-growing advertising markets. Pictured with Mohammed Jefri, then Senior Advisor to the CEO, HungerStation.

SECTION 3

Built for Breakthroughs Around the World



Agency: AnalogFolk + Craft Media London
Client: Perk (formerly TravelPerk)
Campaign: Built for Breakthroughs
Markets: USA, Germany, France, Spain, Netherlands

Perk, the newly rebranded all-in-one travel, expenses and spend management platform, needed to make itself known across five countries simultaneously. AnalogFolk and Craft Media London identified a \$1.7 trillion problem nobody had named, built a campaign around it, and put it on the slopes in Austria, in Times Square, and on CNBC.

The brief was large and the challenge structural. Perk (formerly TravelPerk) had acquired three companies in four years and was launching as a unified AI-native platform across business travel, expenses and spend management. The rebrand needed to work in five markets simultaneously, reach both senior decision-makers and frequent travellers, and do so against established platforms with far larger budgets. The agencies' first move was to commission Forrester Consulting to quantify the problem Perk was solving. The research, 721 decision makers and 8,000 employees across six countries, found that employees lose an average of seven hours a week to administrative shadow work. The aggregate cost: \$1.7 trillion annually across six major economies.

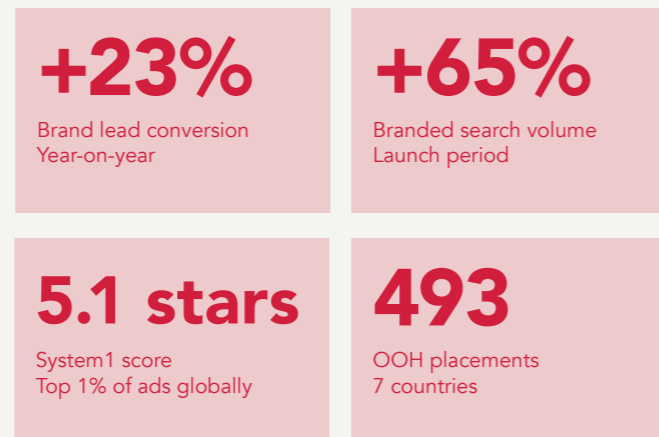
That number gave the campaign its spine. AnalogFolk and Craft pivoted Perk's positioning from transactional utility to strategic productivity, reframing the category entirely: the problem was not the cost of travel, but the human potential lost to the process surrounding it. The creative platform, Built for Breakthroughs, dramatised this through wry humour, imagining Isaac Newton distracted by a travel itinerary, Marie Curie buried under receipts. The 60-second film, directed by Femi Oladigbolu and produced by Untold Fable, scored 5.1 on System1, placing it in the top 1% of ads globally.

Media placement matched the creative ambition. Craft took the campaign to ski slopes in Austria (Perk's core decision-maker is twice as likely to ski as the general population), wrapped the Wall Street Journal, and dominated Penn Station with 210 placements. Across seven countries: 493 OOH placements, 13 TV networks, 17 newsbrands, 23 podcast placements. Pipeline grew significantly year-on-year. Brand lead conversion increased 23%. Branded search jumped 65%. The campaign generated 200+ media placements including a segment on CNBC's Squawk Box.

“ We saw an opportunity to take the universally recognised, yet invisible, problem of shadow work and bring it vividly to life - dramatising it through humour and bold storytelling. ”

Anna-Lou Gladwell
 Managing Director, AnalogFolk

Results at a Glance



“ Algorithmic planning would tell you a B2B audience can only be found on LinkedIn. We found them on the slopes, made them laugh, and then made them call the sales team. ”

Jenny Jones
 Founder, Craft Media London



SECTION 3

Building a Social-First Growth Model Across Europe for Lipton



Agency: Billion Dollar Boy
Client: Lipton
Campaign: Building a New Model for Culture-Driven Growth
Markets: France, Belgium, Netherlands, Poland, Turkey

Lipton wanted to become one of the world's top five beverage brands, but doing so required winning relevance with a generation increasingly resistant to traditional advertising. Billion Dollar Boy's response was to build a decentralised creator and social model capable of making the brand culturally fluent across multiple European markets simultaneously.

Lipton's challenge was fundamentally cultural rather than purely commercial. While the brand retained strong recognition across Europe, it needed to reconnect with Gen Z audiences who increasingly consume media through creators, platforms and communities rather than traditional advertising channels. Billion Dollar Boy was tasked with developing a scalable social-first approach capable of working across France, Belgium, the Netherlands, Poland and Turkey without flattening the local differences that shape online culture in each market.

The agency's solution became known internally as the 'Social Hub Model' - a hybrid structure combining central strategic leadership with market-specific creator partnerships and local audience insight. Billion Dollar Boy began by auditing Lipton's social activity across all five territories to identify gaps in engagement, tone and platform behaviour. Rather than simply translating creative assets between countries, the model prioritised local cultural fluency, enabling creators and regional teams to shape content around emerging conversations, humour and social behaviours specific to each.

That approach allowed Lipton to move from passive advertising into more active cultural participation. Working with creators including Average Rob and Moyo, the brand developed content designed to feel native to social feeds rather than imposed by corporate marketing structures. Faster turnaround processes also allowed Lipton to respond to trends and conversations with greater speed across multiple territories simultaneously.

The commercial impact demonstrated the scalability of the model. The campaign reached more than 58 million people across Europe while generating more than 375 million organic views. Across key markets, Billion Dollar Boy's social-first system delivered between three and five times more effective reach than traditional advertising benchmarks, helping reposition Lipton as a more culturally relevant brand among younger consumers.

“ Billion Dollar Boy have helped us build a more connected creator system across markets - giving teams clarity, while still allowing them to respond in locally relevant ways ”

Emrah Oner
 Global Digital Marketing Director, Pepsi Lipton

Results at a Glance



“ By placing regional creators at the centre of content production, we bring hyper-local intelligence and creator fluency into a connected global system. That allows brands to operate with both control and agility. ”

Ed East
 Global CEO and Co-Founder



SECTION 3

1.2 Trillion Pixels to Show the Future



Agency: Framestore

Discipline: Immersive XR/VFX/Attractions

Project: Museum of the Future - Space Lift

Market: UAE, Dubai

The Museum of the Future is one of the most recognisable buildings on earth. Its centrepiece experience, a journey from present-day Dubai to an orbital space station in 2071, was created by Framestore in London. The project was not won through a pitch. It was won through a conversation.

The brief came to Framestore through years of quiet groundwork: sharing relevant work with contacts in the region, demonstrating capability, and gradually building trust across time zones and cultural boundaries. The breakthrough was a visit to London by a key client, a chance conversation that turned into a serious discussion about how a British VFX studio might collaborate on the most ambitious immersive project in the Middle East. The client's first concern was not technical. It was cultural. Could a London studio genuinely understand what this building meant to the UAE?

Framestore's answer was radical transparency. Rather than presenting credentials, the team walked the client through every stage of their process: communication cadence, feedback cycles, financial terms, how often the team would travel to Dubai, what input would be required and when. The project was won on the clarity of that process as much as on the quality of the showreel.

The Space Lift, a freight elevator housing ten 75-inch 4K screens, takes groups of visitors on a fully immersive journey: launch from a future Dubai SpacePort, zero-gravity transit to the orbital station OSS Hope, and re-entry and landing. Future Dubai, the centrepiece sequence, was rendered at 1.2 trillion pixels, four feature films' worth of CG, with more than 400 bespoke buildings designed from scratch using procedural workflows in Houdini. Sound designer Raja Sehgal reconfigured a London studio to match the exact dimensions of the capsule, then travelled to Dubai to integrate the 360-degree soundscape on-site.

The project was profitable, generated immediate follow-on briefs from the direct client, and produced inbound enquiries from other UAE organisations who experienced the installation. For Framestore, it established a template: one landmark project, executed with rigour and cultural intelligence, creates sustained commercial presence in a new market. The Gulf had become a territory, not a transaction.

Project at a Glance

Client: Museum of the Future, Dubai

Market: United Arab Emirates

Year: 2022 - ongoing relationship

Discipline: Immersive XR / Realtime VFX

Sound partner: Grand Central Recording Studios

1.2 trillion
Pixels rendered

400+
Bespoke CG buildings

10
75-inch 4K screens

Year 2071
Setting: orbital station OSS Hope

“ Working with Framestore was a pleasure and an inspiration. Together we crafted one of the museum's most important and appreciated works - an experience that kicks off the visitor journey with excitement and elegance. ”



Brendan McGetrick
Creative Director, Museum of the Future

“ The amount of pixels we had to render was vast, 1.2 trillion, or four feature films' worth, which meant we only had one chance. We tested, tested and tested again before hitting render. ”

Jay Khan
VFX Supervisor, Framestore



SECTION 3

For the Why



Agency: New Commercial Arts

Client: Financial Times

Campaign: For the Why

Markets: UK, USA, EMEA, APAC

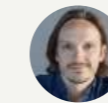
Nine weeks. That was all New Commercial Arts had between winning the Financial Times pitch and delivering a global campaign with the US as the priority market. Competing against the New York Times and Wall Street Journal, with a brand some Americans assumed wasn't for them, the agency needed more than authority. What they produced scored higher in New York than in London.

New Commercial Arts had nine weeks to launch a global creative campaign for a brand that had every reason to be formidable but hadn't been advertised as such in years. The task was particularly acute in the US, where a 138-year-old British institution - its very name implying specialism - competed for subscribers against the New York Times and Wall Street Journal.

For The Why, the platform NCA developed, turns on a structural tension. Every organisation can tell you WHO, WHAT, WHERE. Only the FT, it argues, can tell you WHY - and in a media environment made ever-noisier by AI-generated content and partisan commentary, that distinction carries genuine value to readers. The campaign launched in January 2026 across OOH, AV and social, with the US as the priority market. Focusing on the financial district and transport hubs, its centrepiece was a full Penn Station takeover in New York, 4 story-specific assets across 20 sites each presenting a story's basic facts before directing audiences to the FT for the explanation that no other media could provide.

Post-campaign tracking by Savanta (April 2026) showed subscription consideration among US audiences at 83% - and in New York City, the FT's primary export battleground, 91%. That figure is higher than the brand's London home-market score. In a category where British institutions have historically struggled to export credibly, the result is significant. It points to something NCA understood early: that a creative argument built on demonstrating analytical depth, rather than claiming institutional prestige, translates across cultural and competitive boundaries with unexpected force.

“ The FT is a product of the highest quality and profound importance; it's a privilege to be able to distil that and share it more widely. ”



Matt Walters
Chief Strategy Officer, New Commercial Arts

Results at a Glance

91%

Subscription Consideration
New York City, post-campaign

83%

Subscription Consideration
US market, post-campaign

+62%

Premium Subscription
Growth
Year-on-year, H1 2026

37,657

New B2C Subscriptions
Global H1 2026 (inc. trials)

“ When we're making big claims like trust, the more it's claimed, the less powerful it becomes. What we were at pains to do here, particularly in a market like the US where the media landscape is increasingly divided, was to say it without saying it. That's what really good advertising does; it taps into an essential truth without hitting you over the head with it. ”



Graham MacFadyen
Consumer Marketing Director, Financial Times



SECTION 3

Swedish Thoughtfulness – New Frontiers



Agency: Publicis London
Client: Electrolux
Campaign: Swedish Thoughtfulness
Markets: Poland, Vietnam

Publicis London was appointed by Electrolux to support two priority product launches in markets where the brand had limited presence and consumers treated white goods as an afterthought. The challenge was the same in both countries: in a category driven by urgency rather than preference, how do you make people choose you before they need you?

Buying a kitchen hob or a washing machine tends to happen for one reason: something has broken, a home is being fitted out, or a renovation is underway. The trigger is rarely planned, but the decision that follows usually is. Consumers research reliability, capacity, energy ratings and reviews. They compare prices and read brand reputation into long-term performance. This is not an impulse category but it is a low-frequency one, and that creates a specific problem for brands. Electrolux, a Swedish company with a strong product range, faced it acutely in two markets: Poland, where top-of-mind awareness was low despite a quality offer, and Vietnam, where it was fighting for share in a market it had barely penetrated. The question was how to build brand preference during the long stretches between purchase triggers, so that when the moment came, Electrolux was already the considered choice.

Publicis London's answer was to stop competing on features and start competing on identity. The strategic platform, Swedish Thoughtfulness, drew on Scandinavian design culture and a particular kind of understated humour to position Electrolux not as an appliance manufacturer but as a provider of lifestyle support systems. The products were the same. The framing was entirely different.

Two campaigns were developed concurrently. In Poland, Tough Being Beautiful launched the SaphirMatt hob with a campaign that dramatised product quality through the lens of everyday aesthetic stress, the things that matter to people who care about their kitchens. In Vietnam, Wash-Life Balance positioned the UC3 washing machine against the backdrop of modern urban pressure, turning a laundry appliance into a statement about how you choose to spend your time.

The results were striking across both markets. In Poland, sales rose 5% and brand recall increased 61%. In Vietnam, sales grew 18%, brand consideration rose 47.6% and brand recall improved 49%. Two different cultures, one strategic idea, executed with enough local specificity to feel native in both.

“Publicis London helped us transform Electrolux from a functional appliance brand into a distinctive lifestyle brand that consumers noticed and chose.”

Electrolux brand team

Results at a Glance

+5%

Sales growth
Poland

+61%

Brand recall
Poland

+18%

Sales growth
Vietnam

+47.6%

Consideration
Vietnam

“This project shows how UK strategic and creative thinking can unlock growth for global brands by finding culturally relevant truths and turning them into distinctive campaigns.”



Adam McGlashan
Publicis London



SECTION 3

Sound Mind, Sound Body: Across the Marathon Cities

TALON_
Think outside

Agency: Talon / Evolve
Client: ASICS EMEA
Campaign: Marathons EMEA 2025
Markets: UK, Spain, Italy, Germany, London, Seville, Milan, Hamburg, Berlin

ASICS's philosophy - Sound Mind, Sound Body finds its most powerful expression at the point where a runner crosses a start line. Talon's international OOH division Evolve, working alongside Publicis Groupe Netherlands, built a five-city European campaign around exactly that moment: placing the brand not where audiences might pass, but where they would feel it most. The purchase intent results in Seville and Milan suggest the precision was worth it.

Talon's international OOH division Evolve has partnered with Publicis Groupe Netherlands and ASICS EMEA since 2022, building a cross-market programme that has grown the brand's European OOH investment an average of 44% year on year. When the brief arrived to amplify ASICS's marathon sponsorship across five cities; London, Seville, Milan, Hamburg and Berlin that three-year relationship provided the data architecture and planning trust needed to move beyond standard media placement.

The insight was as much about geography and timing as media format. Evolve selected OOH sites using marathon approach routes, race-day footfall data and running-category audience profiles placing ASICS at the moments of highest emotional engagement for participants and supporters: the approach to the start line, the race route, the fan zones. Centralised planning delivered brand-level consistency while accommodating the local media dynamics of each city. A bespoke cross-market effectiveness study, commissioned through Talon's in-house research team, measured awareness and purchase intent shifts to build a strategic evidence base for future investment.

Where final data is available, the results validate the approach. Seville delivered a +8 percentage point uplift in purchase intent; Milan returned +5 percentage points. ASICS's own financial report shows Performance Running revenue grew 8.8% over the period, a figure the brand attributes in part to increased marathon-led activation across Europe. For Talon and Evolve, the campaign makes the commercial case for centralised international OOH planning with genuine local execution depth: one coherent brand argument, precisely calibrated to five different cities and five different race-day audiences.

“Thanks to strong collaboration between ASICS, Evolve and Publicis, we built consistent, high-impact visibility across key marathon cities delivering excellent reach and frequency ahead of and on race day, and bringing ASICS's 'Move your body, move your mind' message to life in all the right moments.”



Almèri Solomon
Paid Media Manager, ASICS EMEA

Project at a Glance

+44%

OOH Investment Growth
ASICS EMEA avg YOY since 2022

+8pp

Purchase Intent Uplift
Seville - Evolve effectiveness study Spirit's 6th-largest crowd ever

+5pp

Purchase Intent Uplift
Milan - Evolve effectiveness study

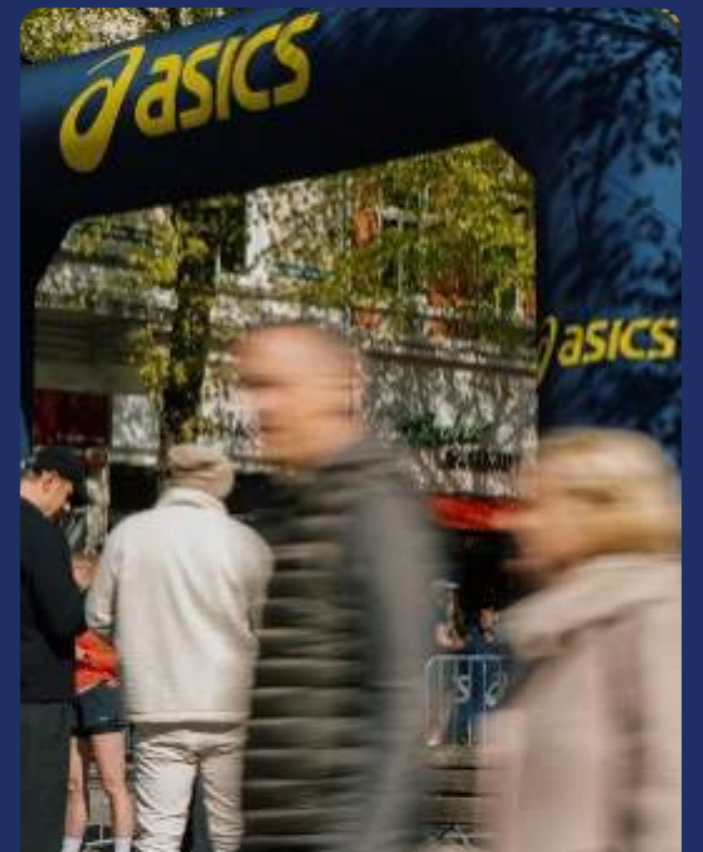
5

Marathon Cities
London · Seville · Milan · Hamburg · Berlin

“Our partnership between Evolve, ASICS and Publicis helped us build an impactful OOH strategy across our key marathon cities. Together we brought to life ASICS's brand messaging in contextually relevant locations creating a strong brand presence in these special moments for both marathon participants and supporters across Europe.”



Marine Verdier
Account Manager, ASICS EMEA - Publicis Groupe NL



SECTION 3

Turning a Crocs Store Launch into a NY Cultural Moment



Agency: The Berry
Client: Crocs
Campaign: NYC Store Launch
Markets: United States

Crocs' New York retail expansion became something closer to urban performance art after The Berry transformed a flagship store launch into a citywide spectacle involving runaway CGI balloons, faux newspaper reporting and carefully engineered social realism designed to blur the line between advertising and public conversation.

When Crocs prepared to open flagship stores on 34th Street and in SoHo, the brand wanted more than a retail launch. The challenge for The Berry was to create a culturally resonant New York moment capable of cutting through one of the world's most saturated media markets while turning physical store openings into entertainment events. The agency already had a growing relationship with Crocs leadership giving them the confidence to propose an unusually ambitious integrated campaign.

The creative platform centred on an absurd but believable premise: giant Crocs Thanksgiving balloons had escaped across New York City. The Berry built a rolling sequence of CGI-led social content showing runaway balloons breaking free near Central Park, bouncing between skyscrapers and appearing unexpectedly across Manhattan. Crucially, the work was designed to resemble spontaneous user-generated footage rather than polished advertising, using imperfect framing, handheld movement and reactive commentary to make the spectacle feel authentic.

The illusion extended beyond digital channels. Wheat-paste posters appeared across the city offering rewards for locating the missing balloons, while custom newspapers distributed outside stores presented the fictional incident as genuine local news coverage. QR codes and discount incentives connected the storytelling directly to retail footfall, bridging online attention with in-store conversion. The campaign generated more than 10 million social views while helping Crocs achieve record-breaking store sales during launch week. More than 4,000 newspapers were distributed by hand, with an estimated audience in the two surrounding retail districts estimated at up to four million weekly visitors. For The Berry, the project also marked a significant step in the agency's growing presence within the United States market.

Results at a Glance

10M+ Social views Across campaign content	4k Newspapers distributed Handed out in NYC
4M Weekly footfall 34th Street district and SoHo	Record Store sales Launch week performance

“ Our Crocs NYC Launch represented exactly the kind of ambitious, culturally driven work we want The Berry to be known for. ”



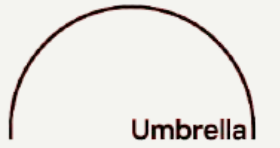
“ The campaign proved how creative disruption can drive genuine audience engagement, growth and commercial impact. ”

The Berry
Agency Statement



SECTION 3

Scaling UK Promotional Campaigns into the US and Egypt



Agency: Umbrella
Client: Pladis
Campaign: Supporting Pladis Through International Promotional Activation
Markets: USA & Egypt

Results at a Glance

11M+ Promotional packs US Flipz activation	2x UK Average CRM opt-in rate McVitie's Egypt
150+ Campaigns delivered Umbrella x Pladis	2 International markets US and Egypt

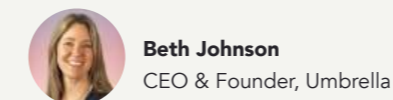
Umbrella's relationship with Pladis spans more than 150 shopper marketing and promotional campaigns, but its international remit accelerated as regional teams began looking to export successful UK mechanics into new markets. Two projects in particular demonstrated the complexity of that process: adapting McVitie's centenary celebrations for Egypt and launching a large-scale Flipz promotion in the United States tied to Xbox's 25th anniversary.

The challenge was not simply creative localisation. Each market required different legal frameworks, mobile participation journeys, CRM structures and fulfilment systems. In Egypt, Umbrella reworked McVitie's '100 Years' platform into a culturally relevant "100 Gold Coins" mechanic supported by multilingual microsites and mobile-first entry systems designed around regional digital habits. The campaign ultimately delivered an exceptional 2X UK average CRM opt-in rate, creating a valuable long-term consumer engagement database for the brand.

For Flipz in the United States, Umbrella travelled to New York to appoint specialist legal, fulfilment and production partners capable of supporting a national retail activation linked to Microsoft's Xbox brand. The agency adapted UK promotional expertise into a distinctly American retail campaign built around scale, prize visibility and frictionless participation. 10's of millions of promotional packs entered circulation across the US market.

Across both projects, Umbrella acted as a strategic operational partner coordinating creative, localisation, compliance, CRM integration, consumer journeys and fulfilment infrastructure. The campaigns strengthened Pladis' ability to maintain global promotional consistency while adapting effectively to different international commercial realities, regulatory systems and audience expectations.

“ Our role extended far beyond creative execution, requiring localisation strategy, compliance management and operational delivery across multiple territories. ”



“ These campaigns demonstrated how UK promotional expertise can be adapted successfully across very different international retail and consumer environments. ”

Umbrella
Agency Statement

Why this matters

Promotional marketing is often treated as market-specific execution work, but Umbrella's Pladis campaigns demonstrate how UK-developed shopper marketing systems can scale internationally when supported by localisation strategy, compliance expertise and technical infrastructure. The work highlights a less visible but commercially important area of UK advertising exports.



Section 4 UK Advertising Businesses Going Global

How UK advertising businesses have grown through export

UK advertising businesses are increasingly building international growth strategies around exports, overseas expansion and global client relationships. From independent agencies to global networks, UK companies are using creativity, strategy, production and technology to win work internationally and grow their presence in markets around the world.

Four Routes to International Growth

Route 1	Following the client: agencies grow internationally because their UK clients expand and take the agency with them
Route 2	Innovation and Technology-led capability: agencies with a distinctive new offer or technical edge (virtual production, AI, platform specialism, content network, influencer management) win global pitches on capability alone
Route 3	Market specialism: agencies build deep expertise in a specific geography (China, East Asia, Middle East) or market segment (sports fans, games players, pop culture, luxury consumers)
Route 4	Physical market entry: - agencies establish in-market operations, building local infrastructure and local clients



UK House at SXSW Austin 2026

SECTION 4

Agency Growth Strategy



Agency: BBD Perfect Storm
Discipline: Brand & Cultural Transformation
Market: Saudi Arabia KSA
Founded: 2013

BBD Perfect Storm arrived in Saudi Arabia with limited network, no presence and no path in. Within two years, it had secured three clients, signed a strategic local partnership and delivered the opening keynote at the Kingdom's leading marketing festival. The route in ran through UKAEG - and it's instructive for any British agency looking at the Gulf.

BBD Perfect Storm is a brand and cultural transformation company and in the context of Saudi Arabia, the 'cultural' matters. With 65% of revenue from international clients, the agency was already operating in the UAE and Qatar when it identified Saudi Arabia as the next significant growth market. The challenge was fundamental: no Saudi footprint, no local network, and a business environment where relationships are the prerequisite of doing business, not the reward.

UKAEG's role in this market entry was fundamental. A business mission to Riyadh placed the agency in front of local companies, one of those visits became a client. A roundtable at Cannes Lions opened conversations with Middle East delegates. At the Athar Festival, the Kingdom's principal marketing conference, CEO Jason Foo delivered the opening keynote interviewing Jo Malone CBE on stage. That platform cannot be cold-called into existence. It requires an organisation with the relationships, credibility and presence to put a British agency at the front of the room.

The tangible outcomes were significant. A strategic partnership with Digitect, a fast-growing KSA founded agency was formalised with UKAEG's Aisling Conlon and Athar's Mohammed Al Ayed present. It provides the cultural grounding and local delivery capacity BBD Perfect Storm needed to operate credibly in the Kingdom. Three clients have been signed across finance, travel and real estate, generating multi-year fees exceeding £1 million. For an agency with no Saudi footprint at the outset, the result is a structural market presence and a model for British consultancies entering markets where cold introductions rarely open doors.

“ The UKAEG has been a major support to BBD Perfect Storm's expansion into the Middle East. From British Embassy networking receptions through to direct business introductions, it has played a vital role in helping to grow our international business. ”

 **Jason Foo**
Founder & CEO, BBD Perfect Storm

Results at a glance



Why this matters

Saudi Arabia's Vision 2030 programme has created one of the most significant new markets for brand and communications services anywhere in the world. As the Kingdom diversifies beyond hydrocarbons building tourism, entertainment, financial services and real estate sectors at scale demand for world-class strategic and creative work has grown dramatically. UK agencies, combining creative rigour with cultural adaptability, are exceptionally well positioned to benefit. UKAEG's growing presence in Riyadh, as a partner of the Athar Festival and direct embassy relationships provides British agencies with a market entry pathway that would otherwise take years, and considerable capital, to build independently.



SECTION 4

Brands fueled from Islington to Fifth Avenue



Agency: Brandfuel
Discipline: Creative Experience/Experiential
Market: USA, New York
Founded: London, 2005 | New York, 2026

Brandfuel started in a former Pink Floyd recording studio in Islington with five people and a reputation to build. Twenty-one years later it delivers activations for 17 clients at the World Economic Forum, runs a team of more than 330 at Davos, and has opened a New York office backed by a minority stake from Jim McCann, one of America's most successful entrepreneurs. International work did not diversify the business. It defined it.

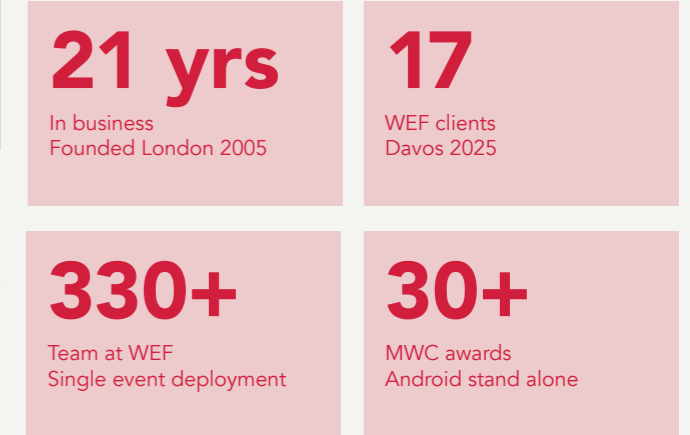
Brandfuel's international credentials were built gradually and then, as these things tend to go, all at once. The first Google project in 2006. The first World Economic Forum activation in 2007, with a team of five. One Young World in 2010, with 1,400 future leaders from 194 countries. The first Android stand at Mobile World Congress in 2011, a double-decker exhibition with a slide which has won more than 30 awards and grown into one of the most recognised presences at the event. Each project extended the agency's reach and its reputation for delivering complex international work at scale.

Brandfuel have delivered work in the United States for more than fifteen years with projects for Google, HP and Bloomberg providing a strong commercial springboard. But with increasing scale, it required a permanent presence and a partner who understood the market from the inside. In January 2026, Brandfuel announced a joint venture with Worth Media Group in New York and the sale of a minority equity stake to Clarim Holdings.


The commercial rationale was clear, clients were asking for Brandfuel boots on the ground in the US but the structure went further than a sales office. A dedicated team of US-based staff, a New York headquarters alongside Worth, and access to Clarim's network created the infrastructure for organic growth rather than a transplanted version of the London model. Within months of the announcement the agency had secured three new US clients and delivered projects in Austin, New York, San Francisco and Miami.

The partnership is the commercial culmination of a philosophy Brandfuel has applied since its earliest international work: that reputation travels further than any sales effort, and that relationships built carefully over years convert into the kind of opportunities that cannot be pitched for. The move from UK service exporter to global agency, as Jeremy Read describes it, was not a strategic pivot. It was the logical next step of a business that had been building toward it for two decades.

Results at a Glance



“ With so much disruption cross-industry and cross-border, we have found that our clients are looking for impactful creative delivered through a reliable and credible partner. We have been able to enter the US market based on our reputation for full-service creative and delivery of ambitious brand experience campaigns. We are excited by the strength and opportunity of our joint venture with Worth, and look forward to continuing to build Brandfuel's legacy, globally. ”

 **Jeremy Read**
Executive Business Director, Brandfuel



SECTION 4

Propeller's Big US Adventure

PROPELLER

Agency: Propeller Group
Discipline: B2B PR & Growth Marketing
Market: United States, East Coast
Founded: 2001

Propeller launched in the US in November 2021 with a clear thesis: a specialist B2B PR agency running integrated transatlantic programmes was an offer the market needed. Four years on, US fee income stands at \$2 million (25% of total revenue). The model that got it there starts with a single hire and a decision about which coast to land on.

Propeller Group is precise about its market position: a B2B PR, content and growth marketing agency specialising in media and tech, ranked among the top 150 global PR agencies by PR Week. When it targeted the US for expansion in November 2021, the founding strategic question was also the most consequential: hire locally or deploy British talent? The answer, a US leadership appointment in Mary Cirincione, promoted to Managing Director within three years set the pattern for everything that followed.

Propeller's model turned on a deliberately two-way transatlantic dynamic: UK clients needing US profile on one side, US clients requiring integrated cross-market coverage on the other. East Coast was selected over West Coast following market research, and the team built a programme presence at the events that define media and advertising such as Advertising Week New York, SXSW Austin and POSSIBLE Miami, running its own panels at each. Strong relationships with US trade media and event organisers provided both market intelligence and a fast route to new business conversations.

By 2025, US fee income had reached \$2 million, 25% of total Propeller revenue, supported by a team of more than ten US-based staff. Client results give the model its commercial validation. For Croud US, Propeller drove share of voice from 29% to 43% over twelve months, placing 103 pieces of coverage in Ad Age, Adweek, Fast Company and Entrepreneur. For Stereo Creative, a six-month programme produced more than 20 top-tier placements, nearly two million in audience reach and speaking slots at Advertising Week New York and Super Bowl LX.

Results at a Glance

\$2m

US Fee Income
FY2025

10+

US Team Members
East Coast office

29 → 43%

Share of Voice Growth
Croud US, 12 months

103

US Media Placements
Croud, Jan 2022–Feb 2025

“

We've increased our US revenues year on year since launching in 2021. We see growing demand for a joined-up approach to comms and marketing as companies build reputation and drive growth globally. The opportunities are significant - but to achieve long-term success you need boots on the ground, local market knowledge and a deep understanding of the US cultural landscape.

”



Kieran Kent
CEO, Propeller Group

“

Partnering with Propeller was like hitting the fast-forward button on our US growth strategy. They already had an established network, knew where the real opportunities were and understood the local media landscape, so we didn't have to start from scratch.

”



Kris Tait
Managing Director US, Croud



SECTION 4

The Independent That Took On America



Agency: VCCP
Discipline: Integrated Advertising & Strategy
Market: North America
Founded: UK/North America

For decades, the American advertising market has been dominated by global holding companies with deep client relationships and vast operational scale. VCCP's North American expansion set out to challenge that assumption, building a genuinely local US business while retaining the strategic culture and independence that defined the agency in London.

VCCP entered the United States with a clear understanding of the scale of the challenge. Nearly 40% of global advertising spend flows through the American market, yet the landscape remains heavily controlled by holding company networks with decades of embedded client relationships. For an independent UK-founded agency, success depended not on simply opening an overseas office, but on proving that its challenger mentality could translate credibly inside one of the world's most competitive communications markets.

The agency's response was deliberately long term. Rather than treating New York as a satellite outpost, VCCP invested in building a genuine American business with local leadership, senior strategic hires and creative talent recruited directly from leading US agencies. British strategic rigour was combined with deep cultural understanding of the domestic market, allowing the agency to compete not as an outsider exporting a fixed UK model, but as a locally embedded creative business with a distinctive independent perspective.

The first five years focused on credibility-building. VCCP initially secured international assignments connected to existing network relationships before gradually earning the right to compete for large-scale US-only accounts. That progression eventually led to major partnerships with Spectrum, one of America's largest advertisers, alongside White Claw, Audi of America, Native, Google and Primark's US launch activity.

The commercial impact has been substantial. Since 2021, VCCP's North American headcount has grown from 12 to 104, supported by consistent double-digit annual revenue growth. The wider group also surpassed Publicis in Campaign magazine's global new business rankings to top the table with more than \$1 billion in billings, while Adweek named VCCP International Agency of the Year.

Results at a glance

104

North America staff
Up from 12 since 2021

\$1BN+

New business billings
Campaign rankings

Spectrum

Major US client
Top-10 advertiser

Adweek

International Agency of the Year
Industry recognition

“

The strategy was simple: be local-first, culture-obsessed and relentless about creating value.

”

VCCP North America

“

We came to America to challenge convention. Turns out, American clients were ready for it.

”



Julian Douglas
Group CEO, VCCP





Section 5

The Opportunity Ahead for UK Advertising

UK advertising's export success has been built through long-term international relationships, globally recognised creativity and sustained commercial presence in key markets including the US, Europe and the Middle East. The next phase of growth lies in deepening those relationships while expanding into fast-growing international markets where demand for UK creativity, strategy, production and AdTech services is accelerating.

While Europe remains a critically important and established export market for UK advertising businesses, UK Advertising Global Growth is increasingly focused on markets where long-term relationship building, visibility and strategic engagement can unlock new commercial growth opportunities for UK agencies.

Advertising exports are relationship-led and often take years to convert into commercial growth. Understanding which markets matter, who needs to be in the room and how creative business relationships are built is critical to winning international business.

As the international export platform of the Advertising Association, UK Advertising Exports Group (UKAEG) plays a central role in helping position UK advertising globally through market access, trade missions and long-term relationship building. In June 2026, UKAEG will evolve into UK Advertising Global Growth under the wider UK Advertising banner, alongside the launch of a new international campaign and identity in London. The move reflects the programme's evolution from a missions-based initiative into a year-round platform focused on international growth, market access and global positioning for UK advertising businesses.

The following priority markets reflect where UK Advertising Global Growth believes the greatest near and long-term opportunities for UK advertising exports now exist based on market demand, existing commercial momentum and the UK industry's competitive strengths.



AISLING CONLON
International Director for UK Advertising,
Advertising Association

5.1 — Priority Markets for Export Growth

United States: the UK's largest and fastest-growing export market

Population: 340m | GDP: \$30.5tn | 2025 UK advertising exports: £5,514m | 2025 growth: +33.6%

The US is already the UK's largest single advertising export market and in 2025 it became significantly more so. Exports reached £5,514m - up 33.6% year-on-year, representing the single largest bilateral gain in the sector's history. The US now accounts for 28.4% of all UK advertising exports, up from 22.4% in 2024.

The US is a long-term relationship market where trust, visibility and sustained engagement matter. New York has increasingly become a second home for UK Advertising, reflecting both the depth of relationships and the growing number of UK agencies building permanent positions in the US market. Our US strategy is being developed as a three-year programme focused on building long-term visibility and commercial relationships across New York, Austin and Los Angeles. Current plans include a new UK House activation at Advertising Week New York alongside the British Residence Leadership reception, UK House programming and a panel picker bootcamp at SXSW Austin, and exploration of a future Super Bowl-linked business mission.

The Brandfuel case study in Section Four demonstrates what successful long-term US market expansion can look like for a UK independent agency.

Saudi Arabia and the Gulf: a strategic growth market

Population: 36m | GDP: \$1.1tn | 2025 growth forecast: +6.0%

Saudi Arabia and the wider Gulf are already significant growth markets for UK advertising businesses. UK agencies including bandstand, Chrome Productions, Craft Media and Four Communications are actively winning work and building long-term client relationships across the region.

The scale of investment flowing through Vision 2030, across tourism, sport, entertainment, culture and destination branding, is creating sustained demand for international creative, production and communications expertise. This is a relationship-led market where long-term presence matters. Once relationships are established, business can move very quickly.

The Gulf is a relationship-led market where long-term presence matters. Once trust is established, commercial opportunities can move quickly and at significant scale. As the only global partner of Athar Festival, UK Advertising has built a unique long-term platform for engagement in the region. Over the next three years, our focus is to deepen the UK industry's visibility and commercial position across the Gulf through sustained senior-level engagement, government partnerships and increased UK Advertising presence in market.

Our Athar programme in Riyadh, including a Leadership Reception at the British Embassy, senior industry engagement and UK Advertising presence at the Athar Award, forms a central part of that long-term strategy.

The Diriyah/Chrome and bandstand/Mawan case studies in this report demonstrate the scale of opportunity already emerging for UK agencies operating in the market.

United Arab Emirates: the regional gateway market

Population: 10m | GDP: \$570bn | 2025 growth forecast: +4.5%

The UAE, and Dubai in particular, has rapidly become one of the world's most connected business hubs, acting as a gateway to wider markets across the Gulf, Africa and Asia. Global brands, regional headquarters, tourism authorities, entertainment businesses and international media companies are increasingly concentrated there, creating significant opportunities for UK agencies across strategy, production, events, branding and creative technology.

For UK Advertising Global Growth, the UAE represents a natural long-term extension of our wider Middle East strategy. Over the next three years, our focus is to build a more consistent UK Advertising presence in market through partnerships, senior industry relationships and year-round engagement across the region. As more UK agencies establish regional clients and operations across the Gulf, the UAE is increasingly emerging as a commercial, creative and operational hub for international growth.

Nigeria and Africa: the long-term growth opportunity

Population: 230m | GDP: \$0.6tn | 2025 growth forecast: +4.8%

Nigeria and the wider African market represent one of the most significant long-term growth opportunities for global advertising and communications businesses. Rapid population growth, expanding middle classes, increasing digital connectivity and rising consumer markets are creating growing demand for sophisticated brand, media and creative services across the continent. UK agencies already have strong foundations in the market. Work such as HeyHuman's long-standing relationship with Guinness Nigeria demonstrates the strength of UK creativity and strategic capability in culturally complex and fast-growing markets. For UK Advertising Global Growth, Africa is a long-term relationship and market development opportunity. Over the next three years, our focus is to build stronger partnerships, government relationships and in-market engagement, beginning with Nigeria as one of the continent's most influential commercial and creative economies. UK Advertising Global Growth is currently exploring a future Nigeria mission with the UK Government over the next 12 months, beginning with a special UK Advertising event at Cannes Lions this June designed to bring together African and UK industry leaders as part of our longer-term market engagement strategy.

For agencies with the ambition and cultural intelligence to build relationships early, Africa represents one of the most important long-term export opportunities of the next decade.

Asia-Pacific: a long-term strategic opportunity

Regional population: 4.8bn+ | Combined GDP: \$40tn+ | Key markets: India, Singapore, South Korea, Indonesia and China

Asia-Pacific represents one of the most significant long-term growth regions for global advertising, media and creative technology businesses. Rapid digital growth, expanding middle classes, globally influential entertainment markets and increasing investment across technology, gaming, retail and consumer brands are creating major opportunities for internationally focused agencies.

Markets including Singapore, South Korea, Indonesia, India and China all present different opportunities and require distinct commercial approaches, local partnerships and cultural understanding. Recent export data also points to growing UK advertising activity across parts of the wider APAC region, reinforcing the long-term strategic importance of these markets.

For UK Advertising Global Growth, APAC represents a long-term relationship and market development opportunity. We will begin this work with an APAC-focused UK Advertising session at Cannes Lions 2026, bringing together industry leaders and partners from across the region as the foundation for a wider three-year engagement strategy.

Our initial focus will be on helping UK agencies better understand the cultural, commercial and relationship dynamics of doing business across APAC markets through education, insight sessions and market-focused engagement. Over the next three years, we will build this into a broader programme of partnerships, relationships and commercial visibility across the region.



Aisling Conlon, International Director for UK Advertising, Advertising Association speaking at the global reception, Cannes Lions 2025

5.2 — The SME and Regional Growth Opportunity

The UK's advertising export success has historically been driven by large London-headquartered agencies. That concentration is both a strength and a constraint. The next phase of export growth will come from SME and regional agencies with strong creative and strategic capability that are not yet exporting at scale or are doing so informally without the market access, intelligence and international networks required to grow further.

The evidence that it is possible.

The evidence that it is possible is already clear. The agency growth case studies in Section Four demonstrate that international expansion is achievable for independent agencies and specialist businesses, not only large networks. Bandstand's growth in Saudi Arabia, Brandfuel's expansion into the US market and Chrome Productions' international production work all demonstrate different routes to export growth, from long-term relationship building and market expansion to specialist production capability. These are not exceptional outliers. They are the model.

The Creative Places Growth Fund.

The Creative Industries Sector Plan's £150m Creative Places Growth Fund is devolved to six Mayoral Strategic Authorities, - Manchester, Birmingham, Bristol, Leeds, Liverpool and Newcastle. Advertising agencies in those regions should actively engage with this fund as relevant to their international growth ambitions. Historically, regional creative funding has defaulted toward visual arts, music venues and screen. Advertising's role as a major employer and exporter in regional creative economies is under-recognised. This should change - and the report's policy ask on innovation access (Section: Policy Agenda) is directly relevant to agencies outside London.

UK Advertising Global Growth is run by the Advertising Association on behalf of the industry and its members under the wider UK Advertising banner. It is the industry's collective global growth and new business platform - providing access to international markets, year-round insight and the wider UK Advertising programme for agencies of all sizes.

The collective UK Advertising model enables independent agencies to engage internationally with the same visibility, credibility and infrastructure as network agencies. That is the point of the programme: creating international growth opportunities for agencies of all shapes, sizes, specialisms and locations across the UK.



UK X China roundtable at Cannes Lions 2025 hosted by UKAEG and the Chinese Advertising Association (CAA)

5.3 — UK Advertising: The Collective Model for International Growth

UK Advertising Global Growth, run by the Advertising Association and operating internationally under the wider UK Advertising banner, has evolved from a mission-based programme into the industry's collective platform for international growth and new business development, delivering a minimum of four global growth missions each year.

The programme is built on a clear understanding developed through years of international engagement: advertising exports are relationship-led and long-term by nature. Visibility, trust and commercial momentum are built through sustained engagement in market over time.

The 2026-27 programme is structured around three pillars, NSPIRE, GROW and MARKET, designed to help UK agencies understand international markets, build commercial relationships and raise the global profile of UK Advertising.

INSPIRE

Understanding how to win in the markets most relevant to your business. Market insight, cultural intelligence and senior-level access through New York, Cannes Lions, SXSW, Riyadh and emerging APAC engagement.

GROW

Access to markets and opportunities through missions, roundtables, introductions and curated senior-level engagement. The 2026-27 programme includes activity across New York, Saudi Arabia, SXSW Austin, Nigeria and emerging APAC markets building long-term commercial relationships and international growth opportunities for UK agencies.

MARKET

Positioning UK Advertising globally through thought leadership, international partnerships, events and industry engagement. From Cannes Lions and UK House to global PR, embassy partnerships and international speaking platforms, the programme is designed to raise the visibility, credibility and commercial profile of UK advertising around the world — supported by a dedicated international marketing campaign and new brand identity under the UK Advertising banner.



£40m

New business opportunities
Generated for members in
2025 (member-reported)



30+

Senior-level connections
Per mission (member-
reported)



£4,500

Annual membership
Full access: June 2026 -
May 2027

2026-27 Mission Calendar

Event	Date	Location	What's included
SXSW London	1-6 June 2026	London	Launch of the UK Advertising Export Report. Roundtable with SXSW London. UK House VIP and invite only events.
Cannes Lions	22-26 June 2026	Cannes, France	Anchor global moment. Pre-Cannes London event at the Outernet, Roundtables, CMO breakfast, UK Advertising Global reception.
Advertising Week New York	5-8 October 2026	New York, USA	NEW: UK House pop-up. British Residenc Leadership reception and roundtables.
Athar Festival	November 2026	Saudi Arabia	British Embassy Leadership reception. VIP lunch. CMO in conversation sessions. UK table at Athar Awards. Awards accelerator.
SXSW Austin	12-18 March 2027	Austin, USA	Speaker bootcamp (July 2026). Roundtables and UK House speaking slots

Building the next phase of global growth

UK Advertising Global Growth is continuing to expand its international programme through new market exploration, government partnerships and long-term relationship building. Current areas of development include Nigeria and wider APAC engagement, alongside future opportunities linked to sport, entertainment and AdTech.

The programme is designed as a long-term platform for international growth, helping UK advertising businesses build sustained visibility, commercial relationships and market access across priority global regions.



Policy Agenda for UK Advertising Export Growth

The data in Section One confirms UK advertising as a world-class export industry. The case studies in Sections Three and Four show how UK agencies are helping brands and businesses grow internationally through creativity, strategy, production and technology.

The policy agenda that follows is designed to ensure this success is not the high-water mark for UK advertising exports, but the foundation for the next decade of international growth, innovation and global competitiveness.

01. Give advertising parity with screen and music in the government's export support infrastructure

UK advertising is the second largest advertising exporter in the world, generating a £4.2 billion trade surplus in 2025 following 38% year-on-year growth - faster than any comparable services sector. Yet unlike screen and music, advertising still lacks formal recognition within the UK's long-term creative export support infrastructure.

Advertising currently has no equivalent of the UK Global Screen Fund, the UK Music Export Growth Scheme, or the British Film Commission's dedicated inward investment function, despite delivering export performance at scale.

Government support through DBT, the Creative Industries Sector Plan and international partnerships has already helped strengthen UK advertising's global presence, particularly around Cannes Lions and SXSW. The opportunity now is to build on that momentum and recognise advertising as a strategic export sector alongside screen and music.

The opportunity now is to give advertising formal programme status within the UK's creative industries export infrastructure, with recurring multi-year support for international market engagement, trade missions and relationship-building activity delivered in partnership with UK Advertising Global Growth and the Advertising Association.

Advertising exports are relationship-led and long-term by nature. Effective international growth cannot be built through annual funding cycles or short-term planning. A structured three-year partnership approach would allow the industry to build sustained market presence, deeper international relationships and greater long-term commercial return for the UK economy.

No new delivery architecture is required. The programme already exists. The opportunity is to scale a sector already delivering globally at significant commercial value while facing increasing international competition and AI-led market disruption.

02. Actively connect advertising and AdTech businesses to the government support already in place

Government has already made significant commitments to support innovation, scale-up growth and creative technology businesses across the UK. UKRI is investing £100 million into regional creative R&D clusters, the British Business Bank has increased support for creative start-ups and scale-ups, and UK Export Finance has substantial capacity available to support Creative Industries exporters.

The opportunity now is to ensure advertising and AdTech businesses, particularly independent agencies, SMEs and regional companies, are systematically connected to these programmes and understand how to access them.

The case studies throughout this report demonstrate what UK advertising businesses can already achieve internationally, without formal programme support. With stronger access to innovation funding, export finance, R&D programmes and business support infrastructure, that growth could accelerate significantly.

The recommendation is for UK Advertising Global Growth and the Advertising Association to operate as formal industry referral partners for relevant government programmes supporting innovation, exports and business growth. Advertising and AdTech businesses should be more actively included within programme outreach and engagement activity, with particular focus on SMEs and regional agencies.

UK Advertising Global Growth is well positioned to help government programmes engage more effectively with the advertising sector, improving awareness, accessibility and participation across agencies, production companies and AdTech businesses that may otherwise not see these programmes as relevant to them.

03. Extend talent mobility commitments to fit working in advertising. Strengthen the UK-US creative partnership

UK advertising's competitiveness as a global export sector depends partly on its ability to move specialist creative and technical talent internationally - directors, VFX artists, DPs, platform specialists, producers and strategists - on short-term, project-based assignments across markets. The current visa and mobility framework was largely designed around touring artists, longer-term productions and academic exchange. It is not well adapted to the pace and flexibility international advertising and production work now requires.

This matters most in the US - now the UK's largest advertising export market at £5,514m in 2025 following 33.6% year-on-year growth. The production work underpinning that relationship - including global campaigns and commercial production activity between London and New York - depends on the ability to move talent quickly and efficiently between markets. Every delay or friction in that process creates a direct competitive disadvantage against US-based production companies operating without equivalent barriers.

The Sector Plan commits to supporting travel and cultural exchange following the UK-EU Summit. The opportunity now is to ensure advertising and production are actively involved in shaping future creative mobility frameworks and talent commitments, particularly around short-term international project work. Existing visa structures should be adapted to better reflect the way modern advertising, production and creative technology businesses operate internationally.

UK Advertising Global Growth and the Advertising Association are well placed to support government in this work by helping ensure future mobility frameworks reflect the commercial realities of the advertising and production sectors. UK advertising cannot maintain its global competitive position if it cannot move its people.

04. Recognise advertising as an enabler of all other exports

This report argues that UK advertising is not only a major export industry in its own right, it is also one of the UK's most important export enablers. The expertise, data infrastructure, creative capability and strategic thinking concentrated in the UK advertising sector help British and international brands grow successfully in global markets, while also strengthening the UK's wider international reputation and inward investment appeal.

The case studies in this report demonstrate that impact clearly. Publicis London helped Electrolux grow sales in Vietnam. New Commercial Arts increased Financial Times circulation in the US. Craft Media identified and activated 72.9 million Formula E fans in India. Chrome Productions broadcast Christie's auctions globally to more than 4 million viewers, supporting over \$7 billion in sales activity. In each case, UK advertising expertise was a direct driver of international commercial growth.

The opportunity now is for government to more actively integrate UK advertising capability into wider UK export and trade activity. Export support programmes focused on sectors such as manufacturing, technology, financial services, tourism and consumer brands should more consistently connect businesses with UK advertising agencies capable of helping them grow internationally.

UK Advertising Global Growth and the Advertising Association are well placed to support this work by creating a clearer route into UK advertising expertise for government, exporters and international partners. This could include an online roster of UK agencies, case studies and specialist capabilities designed to help connect businesses with the strategic, creative, production and technology expertise needed to compete internationally.

05. Make the existing innovation infrastructure accessible to advertising - close the CoSTAR and Innovate UK access gap

Section 2.3 of this report argues that the critical question for UK advertising is not whether AI will disrupt the sector, it will, but whether UK businesses emerge as technology leaders who set global standards, or service businesses displaced by US and Asian AI platforms. That outcome depends on whether UK advertising agencies can access the innovation infrastructure needed to build AI-native, technology-grounded capabilities.

CoSTAR, the UK's £75.6m national R&D network for creative technology, covering virtual production, AR, motion capture and AI-driven content, is structured around film, TV, gaming and performance. Chrome Productions' virtual production work for Ford, Framestore's immersive XR for the Museum of the Future, and the AI-driven localisation capabilities UK agencies are deploying across international campaigns all draw on exactly the technology CoSTAR is developing. But advertising has no access route into CoSTAR's facilities or applied research.

The Innovate UK prospectus of March 2026 signals a deep-tech focus that may inadvertently exclude advertising and AdTech businesses from the Creative Industries priority sector.

The ask requires no new money. CoSTAR should open access to advertising practitioners as revenue generating adopters and appliers of its technology. Innovate UK's Creative Industries team should actively engage the advertising and AdTech sectors. The Creative Catalyst should include a programme tier scaled to SME agency innovation needs. UK advertising's position as a global AI and Createch leader, which is what Section 2.3 argues is achievable, depends partly on whether these programmes are designed to include it. No new money is required, just inclusive design of existing programmes that allows one of the UK's fastest-growing creative export sectors to fully participate in the country's innovation economy.

The UK advertising sector is already the world's second largest advertising exporter. The recommendations in this report are designed to help maintain and grow that position over the next decade.



**ADVERTISING
ASSOCIATION**

Find us at:
95 Aldwych, London,
WC2B 4JF



UK Advertising's
Think Tank

adassoc.org.uk
aa@adassoc.org.uk

**UK
ADVERTISING**

 [@advertising-association](https://www.linkedin.com/company/advertising-association)
 [@ad_association](https://www.instagram.com/ad_association)