

2023 REVIEW

Performing against our priorities:

ISBA exists to serve its members. The challenges faced by Marketers are what drive the ISBA agenda and priorities. 2023 saw us make significant progress against those priorities, particularly our biggest objective, the development of a rich and trusted source of data for cross media measurement in the UK.



ISBA is the only body that represents brand owners advertising in the UK. We empower them to understand the industry and shape its future because we bring together a powerful community of marketers with common interests; lead decision-making with knowledge and insight; and give a single voice to advocacy for the improvement of the industry.

ORIGIN

Over the last 12 months, Origin, the UK cross media measurement programme has moved from theory to practice, with five advertisers and their agencies trialling the product in the second half of the year.

This represents a significant milestone in helping the UK advertising industry measure, report and plan cross-media campaigns by giving clarity in an environment where technological advances have changed media-consumption habits dramatically - resulting in increasingly fragmented audiences for advertising and an explosion in the number of advertising formats available online.

Origin will allow advertisers to see the reach and frequency of their campaigns across TV, video and digital, which will enable them to evaluate their media investment and plan more effectively.

The number of advertisers who are funding stakeholders now stands at 36. In addition, all ISBA members are supporting Origin through their membership contributions.

2024 will see 33 advertisers taking place in beta trials, where live data will be used for the first time. This will then move into the pilot launch phase in the final quarter of the year.

A programme of education on Origin for Marketers will also be launched, explaining the way marketers and their agencies will use the product and what they can expect to see in terms of results.



PROGRAMMATIC SUPPLY CHAIN STUDY TWO

In January, ISBA released the headline findings from wave two of the groundbreaking and multi-award-winning **Programmatic Supply Chain Transparency Study** with the AOP (Association of Online Publishers) and carried out by PwC found positive and welcome improvements.

The improvements can in part be attributed to the development of the Programmatic Financial Audit Toolkit, which was launched by the Cross-industry Programmatic Taskforce last February. The Taskforce - which includes ISBA, IAB UK the AOP and the IPA - is the first of its kind and was formed following the 2020 study. It set out to improve the transparency of the programmatic supply chain to allow campaigns to be financially audited end-to-end.

PUBLIC AFFAIRS

While political controversies have caught the headlines over the past 12 months, below the surface it is the tectonic plates which are moving – altering the environment in which advertisers will be operating for years to come.

Most obviously, that has been the case as we move towards the next election, with policies chopping and changing depending on the political weather. The sale of Channel 4 fell by the wayside, the victim of concerted opposition, not least from ISBA members. Online safety legislation was altered to accommodate Conservative backbenchers worried about freedom of speech. Restrictions on ‘less healthy’ food and drink product advertising were delayed until October 2025. The Scottish Government’s draconian alcohol ad bans went ‘back to the drawing board’. As all these issues were fought over, ISBA constructively engaged, recognising the broader societal problems while arguing for our members’ right to advertise.

Less controversially, but no less importantly, the Government has been legislating in ways which fundamentally affect the advertising framework – from creating a post-Brexit GDPR replacement, to new digital market competition rules. Legislation moves slowly compared to the pace of technological change, and so it has proved with the explosive advent of AI. Ministers have recognised the scale of the challenge and opportunity it poses, but rather than wait for regulation, we have partnered with the IPA to set out high-level principles for advertisers and agencies in the use of generative AI.

The coming 12 months will certainly bring further upheaval, but ISBA is well-positioned on all sides of the political divide. Our priority will remain to advocate for a trusted and responsible advertising environment and to help policymakers understand the role that we can play in meeting the huge challenges the country faces, from public health to climate change.

SUSTAINABILITY

The need for advertisers to put environmental sustainability at the heart of their operations is growing. Consumers, lawmakers, and companies’ own staff expect to see nothing less. There is an imperative for brands, along with agencies, media owners and platforms, rapidly to decarbonise their operations and help to promote the adoption of more sustainable products and services.

ISBA is a signatory of the UN Race to Zero campaign, and the WFA Planet Pledge – a global commitment to make marketing teams a force for positive change. In the UK, we are founding partners of Ad Net Zero, the industry drive to reduce the carbon impact of developing, producing, and running ads. Over the course of this year, we’ve moved to provide members with guidance on how they can transform their operations, and understand the challenges they face, by establishing our Sustainability Forum.

We know that this is a hugely contested space and that there is debate over how we measure and transform advertising’s climate impact. We’ve worked to critique some frameworks, not because we disagree with the need for advertising to step up but because we want to support the transition to a net zero economy while supporting social mobility and economic growth.

We’ve also been working closely with the Advertising Standards Authority as it has developed important guidance on green claims in ads. We’ve don’t want to see our members stepping away from talking about sustainability at all, as advertising has a crucial role to play in changing consumer behaviour and in ensuring investment in the more sustainable products of the future. As the ASA continues its work on climate change and the environment in 2024, we want to ensure a dialogue between brands and the regulator so that our industry gets this right.

RETAIL MEDIA FRAMEWORK

ISBA launched the UK's first Responsible Retail Media Framework in November - the result of a year-long industry-wide collaboration of brands, retailers and their tech and consultancy partners. The framework seeks to make the retail media offering work better for everyone.

The promise of the retail media landscape is welcomed by brands, widening the opportunities for privacy-first marketing opportunities for brand penetration as well as being able to reach customers at the point of sale. But its rapid growth has been slowed due to the fragmentation and lack of standardisation in the channel.

Marketers need to properly understand the effectiveness of their media investments in all channels and our members are keen to begin scaling in retail media.

This first phase of the Framework addresses digital inventory. It is UK-centric, reflecting the UK GDPR principles governing the acquisition, use, management and sharing of consumer data, and is mindful of the range and diverse maturity of the tech platforms deployed by individual retailers.

AGENCY SERVICES

2023 saw a renewed focus engaging the marketing procurement community. We've seen exceptional adoption of ISBA guidance with the 2021 Media Services Framework referenced as the industry benchmark for media agency contracting across the contract compliance and consultancy communities.

We've built working groups from our legal and procurement communities to contribute to contract guidance on Generative AI and updates to our Media & Creative Services frameworks to be launched throughout 2024.

We've introduced new insights to support members understand the impact of inflation on agency rates and media pricing. Our In-Housing study helped shed light on the challenges faced when in-housing and the key factors for delivering successful outcomes.

We've focused on bringing marketing procurement closer to their marketing peers by sharing insights from our working groups. Sharing key priorities facing our working groups and the outputs we wish to see adopted across the industry. The feedback from marketing procurement shows the community wants more of this content and value building deeper knowledge on marketing subjects.

We've collaborated effectively with the IPA to promote the Pitch Positive Pledge and advocate for a high standard of advertiser/agency relationships. We've also supported the IPA & APA on initiatives to improve DE&I and the treatment of people in the production industry. We continue to focus on supporting talent in our industry.



MEMBERSHIP UPDATE

Despite a challenging climate, membership remains strong. Our members remain engaged and committed to ISBA's priorities and we finish 2023 with a member retention rate of 96%.

This year, we have welcomed 14 new brands into membership from a range of sectors; **easyJet, Three UK, Vitality, Brown Foreman, Nando's, Sanofi, Avanti, Breast Cancer Now, LVMH, Colgate Palmolive, Mattel, William Hill and Akzo Nobel**. They have joined to participate in Origin, help their teams develop their industry knowledge and skills, access objective guidance and advice with agency relationships and ensure they have a voice on important industry issues that could affect their brand.

Engagement with members has remained high this year, with 98% of member companies participating in 1 or more of ISBA's 14 groups covering media, government & regulatory, special interest and governance. Members have told us they value the opportunity **to share and learn with their peers** while helping ISBA **establish best practice and shape the industry**.

REFRAME ACCESSIBILITY GUIDELINES

At the end of October, ISBA and Flock were proud to launch REFRAME - Guidance for Accessible Advertising.

Accessible Advertising has been a key priority for ISBA's Inclusion Network in 2023, and our ambition for the industry is for all advertisers to consider accessibility when briefing to drive towards an Accessible AV advertising ecosystem by June 2024.

There are 12 million people in the UK who are deaf, have hearing loss or tinnitus - That's nearly 18% of the population who are currently not able to easily access or understand adverts.

ISBA and Flock Associates worked together with ISBA's Inclusion Network and many other businesses in the Accessibility space including RNIB, RNID, and Clearcast as well as brands and media owners to create the guide which is fully accessible to screen readers.

IF YOU WOULD LIKE TO FIND OUT MORE ABOUT ISBA PLEASE VISIT [ISBA.ORG.UK](https://isba.org.uk)