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# **Progress against Priorities November 2022**

**One  
Voice**

# Housekeeping

- Please be aware this session is being **recorded**.
- We need to ensure we **know everyone** who is on the call so we can send you the recording of the session. If we can't, see your **email address** when you join, we might ask you to confirm your details .
- Please put yourself on **mute** if you are not speaking.
- We **LOVE** questions. Don't be shy, please drop any questions in the **chat** or use the **raise your hand** icon. There will also be lots of time at the end to ask the team questions.
- You will be sent a **copy** of the recording as a follow up so you can watch it again and again.
- For those who are new to ISBA or who don't know a lot about us please visit **isba.org.uk**
- If you are an ISBA member you can **sign up** to the member area and access exclusive content just for you. Just click the person icon on the nav bar.

# Agenda

- **Update on the year so far** - Phil Smith
- **Delivering value to members everyday** - Jane Pinn and Bobi Carley
- **Public Affairs Update** - Rob Newman
- **Origin Update** - Tom George
- **Questions**



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# **Priorities Update**

**Phil Smith  
Director General**

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Voice**

**ISBA**

# ISBA

- Only body to represent brands
- Powerful body of marketers
- Understand the industry
- Shape the future
- Lead decision-making with knowledge and insight
- Bring one voice to advocacy



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## **Our Purpose**

- **Environment that is transparent, responsible and accountable**
- **Trusted by all - advertisers, public, legislators**



# Principles

- Inclusive and sustainable advertising environment, delivering positive societal and economic impact
- Media, agency and digital supply chain relationships that deliver value transparently and sustainably
- Thought leadership, actionable learning, advice and guidance



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## **Delivering value**

- **Long-term strategic, industry priorities**
- **Immediate value, every day**





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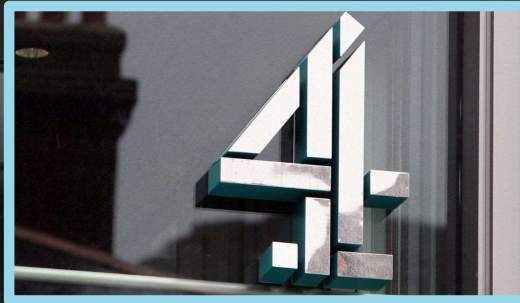
## **Our Big, Audacious Goal**

- **Early Systems and Panel Integration Test 2022**
- **Alpha & Beta Trials 2023**
- **Industry commitment to commercial venture**
- **Full service launch 2024.**



# **Origin**

# Positive societal and economic impact



Department for  
Digital, Culture,  
Media & Sport

Policy paper

**Online advertising - call for evidence**

Updated 18 March 2020

Closed consultation

**Introducing a total online advertising restriction for products high in fat, sugar and salt (HFSS)**

**Health and Care Bill**

[AS AMENDED IN COMMITTEE]



# Inclusive & Sustainable Advertising Environment

## ISBA Advisory Council




**Influencer Marketing  
Code of Conduct**

Version 2: April 2022





# Media, agency and digital supply chain relationships that deliver value transparently and sustainably

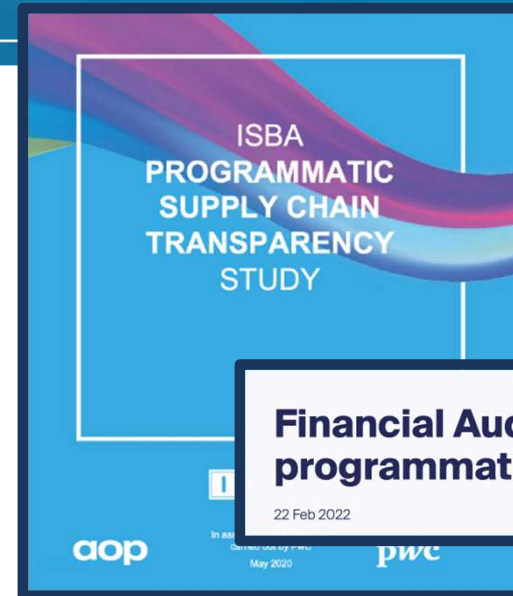


A joint initiative by  

ENDERS | ANALYSIS

**ISBA:**

**Future TV trading model**

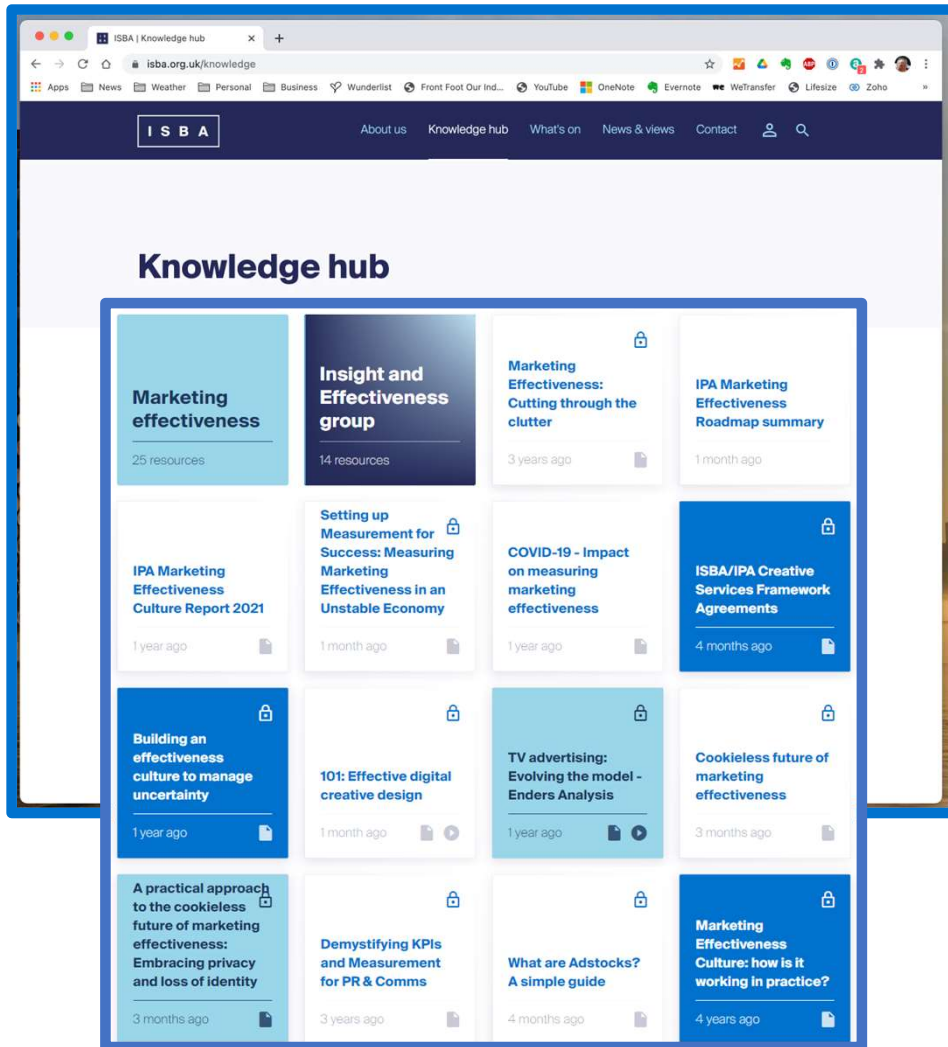


**Financial Audit Toolkit -  
programmatic advertising**

22 Feb 2022



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## Thought leadership, actionable learning, advice and guidance

- 90%+ members on groups
- 200+ up-to-date partner pieces on knowledge hub
- Procurement engagement
- 20 live 101 sessions
- CPD accredited Media Foundation Certificate

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# Delivering value to members everyday

Jane Pinn, Director of Membership  
Bobi Carley, Head of Media

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## **ISBA launches phase three of Origin cross-media measurement**

Isba gets industry approval to fund cross-media measurement tool with ad levy

**ISBA/PwC: 15% of programmatic supply chain costs 'unattributable'**

**Punchy Enders report calls for TV market reforms to save declining ad market**

## **IPA and ISBA launch Pitch Positive Pledge**

New ISBA media buying framework agreement... will this bring us one step closer to a palatable position for both advertisers and agencies?

## **ISBA expands influencer code of conduct to cover diversity**

Signatories commit to addressing pay gaps in influencer marketing as well as working to address diversity in their own marketing teams.

One Voice





**You are part of a powerful community of marketers**

**Stay informed on the issues that matter to advertisers**

**Access face to face & online forums on important industry topics**

**Knowledge Hub with over 200 pieces of expert content on the topics that matter**



**Access expert 1:1 media, agency and procurement advice**

**Framework contracts, best practice & agency benchmarking rates**

**Share insight with other marketers across 13 ISBA Committees and steering groups**

**Programme of free 101 Knowledge Sessions covering media discipline techniques & trends**

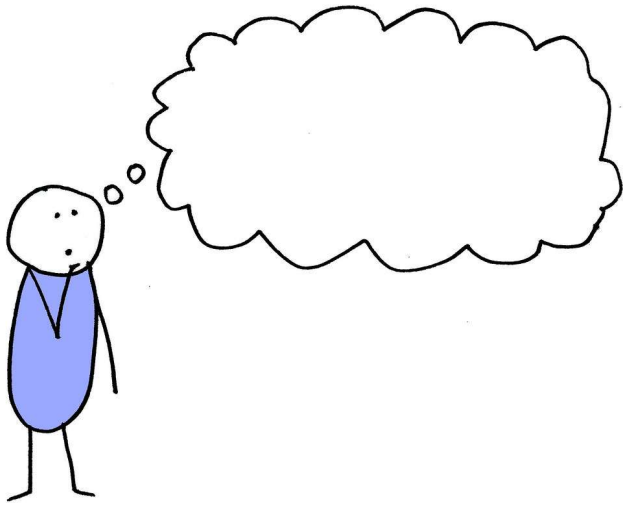
**ISBA CPD Accredited Media Foundation Certificate**





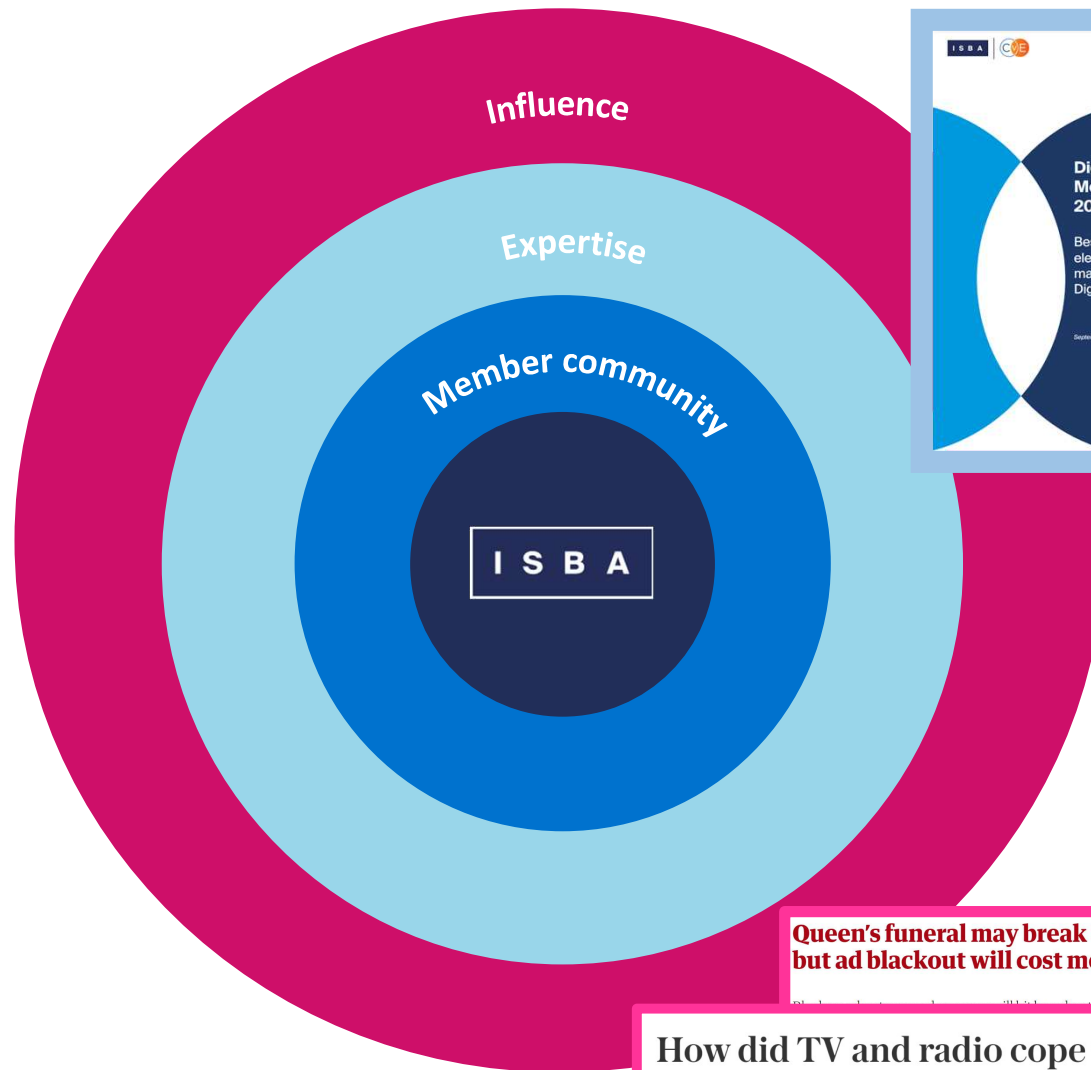
ISBA

Think of us as an **objective** source of guidance and a **network** that you can tap into to understand and discuss the challenges you face **with other marketers**



What % of budget do members typically split between brand/long term and sales/short term?

what is 'best practice' in creative testing, what's the most effective, reaps the clearest, most accurate results & is agile?



**Queen's funeral may break TV records, but ad blackout will cost media dearly**

**How did TV and radio cope with the late Queen's death? Not flawlessly**

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## **Why not**

- Invite ISBA to come along and remind your team of the ISBA resource
- Encourage your teams to register at [isba.org.uk](https://isba.org.uk) to access content and book on events
- Join the ISBA groups and be part of the community
- **And talk to us**



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# Public Affairs Update

## Contact us



**Rob Newman**

Director of Public Affairs

[RobN@isba.org.uk](mailto:RobN@isba.org.uk)



**Stuart Macnaughtan**

Head of Public Affairs

[StuartM@isba.org.uk](mailto:StuartM@isba.org.uk)

[isba.org.uk/public-affairs](https://isba.org.uk/public-affairs)

**One Voice**



-  **Strategic Policy Action Group**
-  **Consultations**
-  **Policy Advice**
-  **Political Intelligence**

**ISBA represents brand owners advertising in the UK, and the Public Affairs team acts as your voice to government and Parliament.**

We work to:

- raise ISBA's profile and influence policy in Government, with opposition parties, in Whitehall and in Parliament, through stakeholder engagement activity and advocacy for the interests of our members;
- bring ISBA's community of brand marketers together with legislators and policymakers in collective pursuit of an advertising environment that is transparent, responsible, accountable, and trusted by parliamentarians and the public;
- demonstrate brand advertisers' proactive commitment to creating positive outcomes for society and the economy; and
- give a single voice to advocacy for the improvement of the industry.

We believe that this activity helps to build and increase trust in advertising and marketing and in the self- and co-regulatory system.

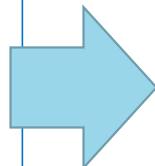


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# PA Priorities

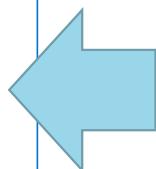
## The Strategic Goal

*To lead the industry in creating an inclusive and sustainable advertising environment that delivers **positive societal and economic impact**.*



## The Method

*Agree and execute ISBA's **Political Strategy**.*



- **Become a thought leader in the advertising industry's relationship with government**, influencing policy by demonstrating advertisers' proactive commitment to creating positive outcomes for society and the economy
- Lead the industry in pressing for implementation of the **Online Safety Bill** without delay
- Continue to shape **self- and co-regulation of advertising** to be sustainable and fit for purpose, influencing the Online Safety Bill and the Online Advertising Programme to reinforce the role of the ASA and secure its long-term funding
- Gain clarity for advertisers on the timing and terms of forthcoming **HFSS ad restrictions**. Lead in developing proactive measures on further **sector-specific ad regulation** issues
- Lead the industry in developing tools to help advertisers foster more sustainable consumer choices, working with the AA and across the industry on **Ad Net Zero's Action 5**, harnessing advertising's power to support behaviour change
- Accelerate industry progress towards greater **Diversity & Inclusion**, supporting the AA's All In and identifying and owning advertiser-specific initiatives

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# Meeting Our Goals



**HFSS**



**Online Safety Bill**



**Channel 4 Privatisation**



**Online Advertising Programme**



**Sustainability**

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### Proposals

- A 9pm watershed on broadcast TV and on-demand programme services (ODPS)
- A ban on paid-for online ads of food & drink HFSS products

### ISBA Action

- Government has agreed to delay implementation until 1 January 2024
- Ministers accepted that they should consult before any change in products in scope in future
- Working to clarify terms of brand exemption with ASA

### Future

- New Government has to decide future of Obesity Strategy
- Parliamentary motion to legally delay implementation must be laid
- Still waiting for consultation that will define terms of exemptions and products in scope



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## **Online Safety Bill**



**Regulation of platforms hosting user-generated content**



Requirements for codes of conduct on specific issues flagged by government



**We've supported proportionate regulation ever since 2017 stories on monetisation**



We're concerned that the Bill has become clogged with individual issues of backbench concern



**Government has pledged to amend the Bill to protect freedom of speech**



**ISBA**

## Channel 4 Privatisation



**Government has proposed sale of Channel 4 in order to help it compete in modern market**



ISBA members are overwhelmingly opposed and we've been lobbying government to drop the sale



**C4 offers advertisers a unique audience – younger, more diverse – which can't be reached elsewhere**



Also have competition concerns if a buyer such as ITV took on C4 and dominated ad space saleshouses



**Sale looks to be in jeopardy – a key win for ISBA members**





**DCMS consultation on the future of paid-for online ad regulation**



Taxonomy of potential harms caused by content or placement of ads ranging from 'legal but harmful' (HFSS, gambling) to illegal behaviour



**Proposes new regulatory options across supply chain – including possibly abolishing the ASA**



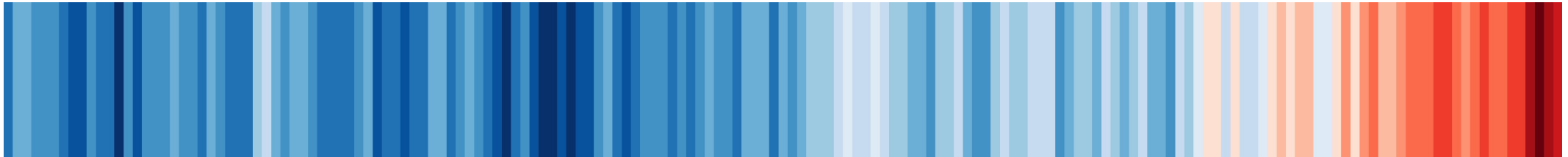
We responded expressing strong opposition to the ASA's abolition and with taxonomy criticism



**Government plans to respond to consultation soon, but Ministerial views unclear**

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# Sustainability and Climate Change



# Other Current Issues

## Gambling

- White Paper expected on review of the Gambling Act 2005 – implications for sector brands

## Data

- Bespoke post-Brexit UK GDPR replacement threatens data adequacy agreement with Brussels

## Digital Competition

- Draft legislation is expected on putting the Digital Markets Unit on a statutory footing

## Alcohol

- Scottish Government is about to consult on restrictions to alcohol marketing

## Influencers

- ISBA produced a Code of Conduct for brands, agencies, and influencers on good practice, including on disclosing to social media users when an ad is an ad
- Government is interested in regulation. Backbenchers also active on body image concerns





# Origin update

Tom George- CEO Origin

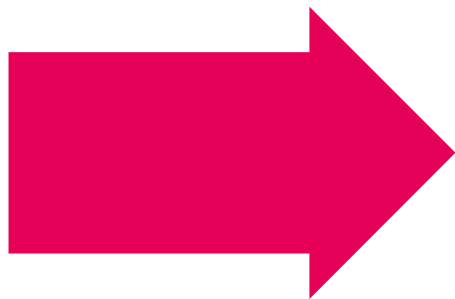
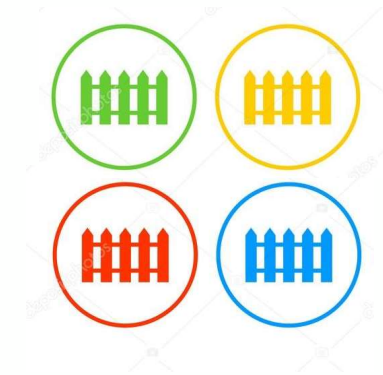
# Origin: The why



**Fragmenting audiences**

**Proliferation of ad formats and experiences**

**Siloed, proprietary measurement**



**Efficiency**  
**Audience experience**  
**Effectiveness**

# Origin: The what

Origin is ISBA's programme to deliver accountable digital and cross media measurement and is part of a global, advertiser-led initiative, backed by the World Federation of Advertisers and following the WFA 'North Star'

The initiative represents a step change in the UK media measurement marketplace:

- 1. Unprecedented accountability across all major global digital platforms**
- 2. An innovative technical framework**
- 3. The opportunity to create a new UK joint industry federation**

The UK is leading the work and will provide a blueprint for the global community



The Advertiser  
'North Star'





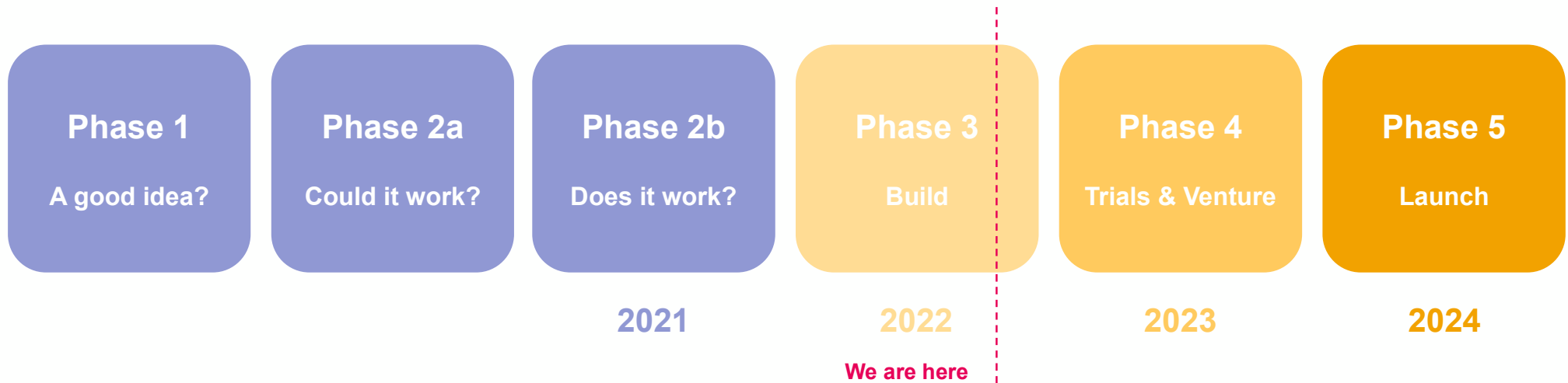
# Origin: The who



			<p>+ watch this space...</p>		

+ watch this space...

# Progress



# Phase 3: 2022 progress



Specification of the launch product scope agreed

Panel installations gaining pace - 600 HH year end

Phase 4 costs estimated & Funding round commenced

Full update of commercial model & 5 Year P&L underway

Productive meetings with potential stakeholders

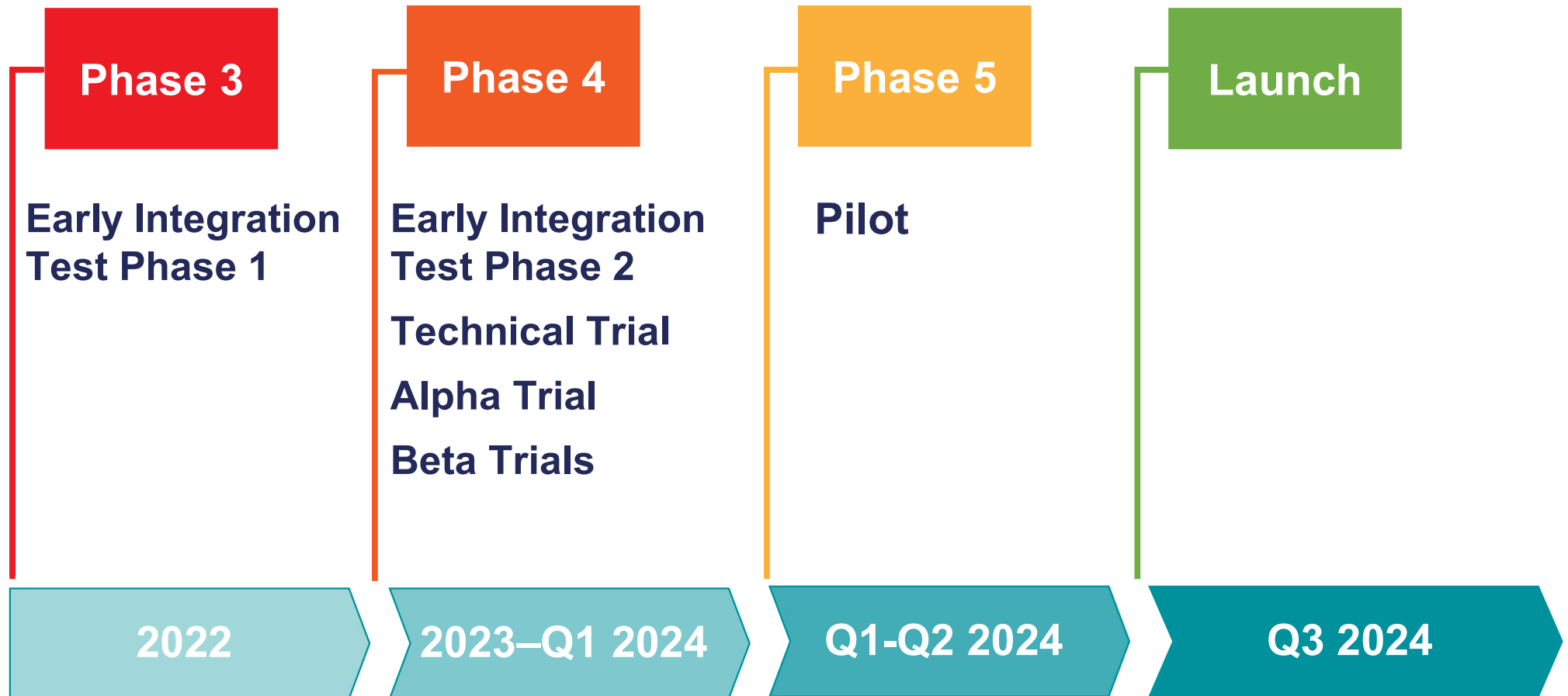
Path to onboarding all ISBA members as stakeholders

Path to Levy launch in 2023

Longform Membership Agreement working group commences

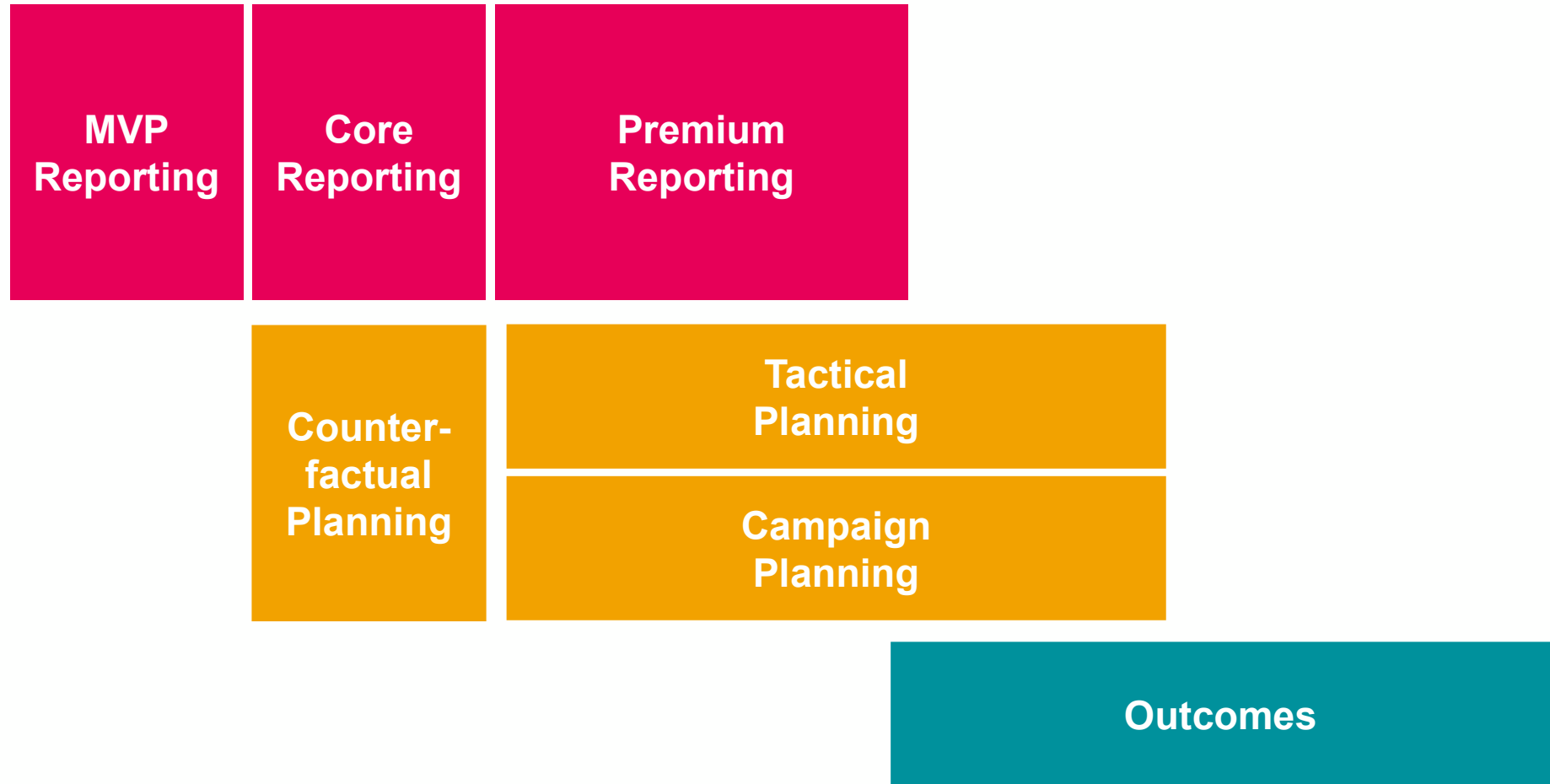
Engineering infrastructure tests commences

# Path to launch

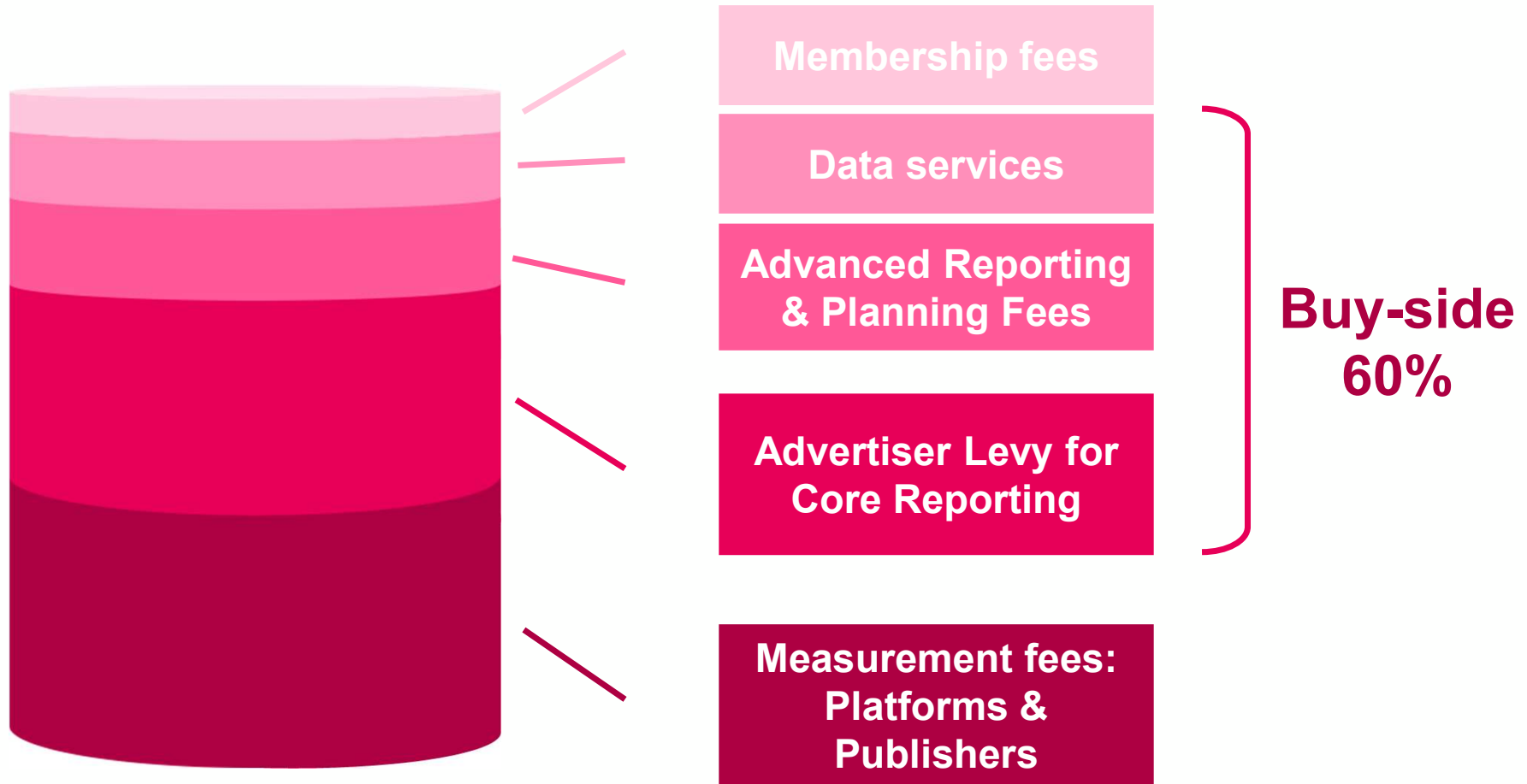




# Roadmap and vision, media-neutral planning



# Funding in life







Origin



# Questions?

