

ISBA

ISBA Priorities 2024
29 February 2024

***What's Changing, Why It Matters,
and How We Help***



**One
Voice**

ISBA

Margaret Jobling

**CMO, NatWest Group
President, ISBA**



**One
Voice**

I S B A

Phil Smith

Director General, ISBA



**One
Voice**

AGENDA

Highlights of ISBA's work in 2023

Phil Smith, **ISBA**

How ISBA will be working for members in 2024

How will Origin benefit marketers?

Tom George, **Origin**
Bhav Balvantrai, **OMG**
Martin Lawson, **Origin**

The impact of the General Election on advertising and marketing

Rob Newman, **ISBA**

Why retail media is becoming an increasingly important media channel

Isobel Trew, **Boots Media Group**
Mark Thompson, **MESH Experience**
Clare O'Brien, **ISBA**

How Diageo is working to make advertising more accessible to all

Eileen Hanna, **Diageo**
Bobi Carley, **ISBA**

Q&A

One
Voice



December 2023: ISBA Member Pulse Survey

YOUR BUSINESS PRIORITIES IN 2024

Which one of these if any, is the top marketing priority for your business in 2024?





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

The ISBA logo consists of the letters 'I', 'S', 'B', and 'A' in a bold, white, sans-serif font, each letter separated by a small space. The letters are contained within a white rectangular border.

Purpose

To create an advertising environment that is **transparent, responsible and accountable**; one that can be **trusted** by the public, by advertisers and by legislators

The 'One Voice' logo features the words 'One Voice' in a white, sans-serif font, stacked vertically. The text is enclosed in a white speech bubble shape with a tail pointing downwards and to the left.

The logo for ISBA, consisting of the letters 'I', 'S', 'B', and 'A' in a bold, white, sans-serif font, each letter separated by a small space, all contained within a white rectangular border.

ISBA will:

- Empower advertisers to create **media, agency and digital supply chain relationships** which deliver value **transparently and sustainably**
- Lead the industry in creating an **inclusive and sustainable** advertising environment that delivers **positive societal and economic impact**
- Deliver **thought leadership and actionable learning, advice and guidance**, working with our community of members and with partners

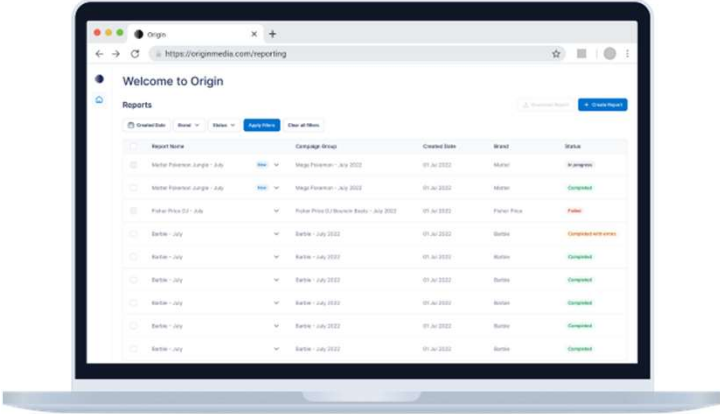
The 'One Voice' logo, featuring the words 'One Voice' in a white, sans-serif font, stacked vertically, inside a white speech bubble shape with a tail pointing towards the bottom right.

2023 Highlights



Origin

- Alpha Trials
- Panel Build
- Data Provider Integrations
- Fractional Advertiser Contribution
- Stakeholders
- Beta readiness
- Team



essence**mediacom**

L'ORÉAL

essence**mediacom**



MINDSHARE



ISBA/PwC Programmatic Supply Chain Study II

- Improved data access
- Better data quality
- Fewer websites
- Improved match rate
- Less unattributable spend
- More net revenue to publishers
- Clear recommendations

Second programmatic supply chain study reveals 'big step forward' in transparency

MarketingWeek

'Unknown delta' discovered as programmatic supply chain transparency improves

campaign

Isba audit sees publishers grow programmatic ad spend share 8%

 **The Drum.**

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Responsible Retail Media Framework

Industry Collaboration

- Transparency
- Transformation & Tech
- Talent



Principles for the use of Generative AI in creative advertising

- Responsibility, ethics
- Public trust
- Transparency with consumers
- Environmental impact
- Discrimination and bias
- Individual rights
- Intellectual Property
- Employment and talent
- Due diligence
- Human oversight and accountability
- Transparency between advertiser and agency
- Continual monitoring and evaluation

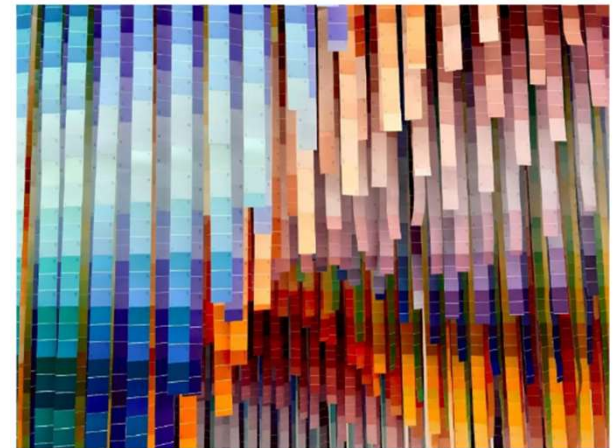


Plus

- ISBA/Flock REFRAME Accessible Advertising Guide
- DCMS Online Advertising Taskforce
- Health & Care Act: Less Healthy Foods
- Global Alliance for Responsible Media
 - Member Bootcamps
 - Media Emissions Framework
- Increased member participation
- Procurement community engagement
- Media Foundation Certificate

Reframing accessible advertising

Flock and ISBA 31 Oct 2023



2024 Priorities



Origin 2024

- **Launch**
- **Adoption**
- **Benefits**
- **Roadmap**
- **Funding**



- **Template Contract Frameworks**

- **Responsible Retail Media Framework**
- **Digital Supply Chain**

Sustainability

- **Regulatory clarity**
- **Media emissions measurement framework**



Advertising Accessibility

- **Lead Ad Access Alliance**
 - **Advertiser pull**
 - **Agency engagement**
 - **Publisher change**
 - **Measurement**
- **Standards**
- **Best practice**
- **Lead market adoption**



Political Strategy

- **Prepare for General Election**
- **Online Advertising Taskforce**



Global Alliance for Responsible Media

- Adoption



Advice & Guidance

- **Generative AI**
- **Working Group engagement**
- **Procurement**
- **Media Excellence Certificate**

I S B A

Tom George
CEO, Origin



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Origin

originmediameasurement.com

Origin update:

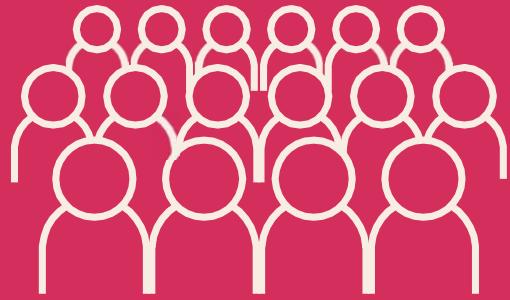
Turning Theory Into Practice

February 2024

Advertiser needs



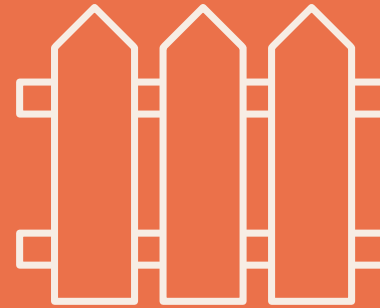
Origin



**Fragmenting
audiences**



**Proliferation
of ad formats
& experiences**



**Siloed,
proprietary
measurement**

**1 Drive
Efficiency**

**2 Improve
Audience
Experience**

**3 Deliver More
Effective
Campaigns**

Over 50 funding stakeholders investing over £50m



Origin

ISBA

	L'ORÉAL				British Gas
DIAGEO	HALÉON		MARS	Nomad Foods	
TESCO			allwyn	Confused.com	DirectLine Group
			Money Super Market		Sainsbury's
		Kellanova			nationwide
sanofi	KraftHeinz	+TBA	+TBA	+TBA	+TBA

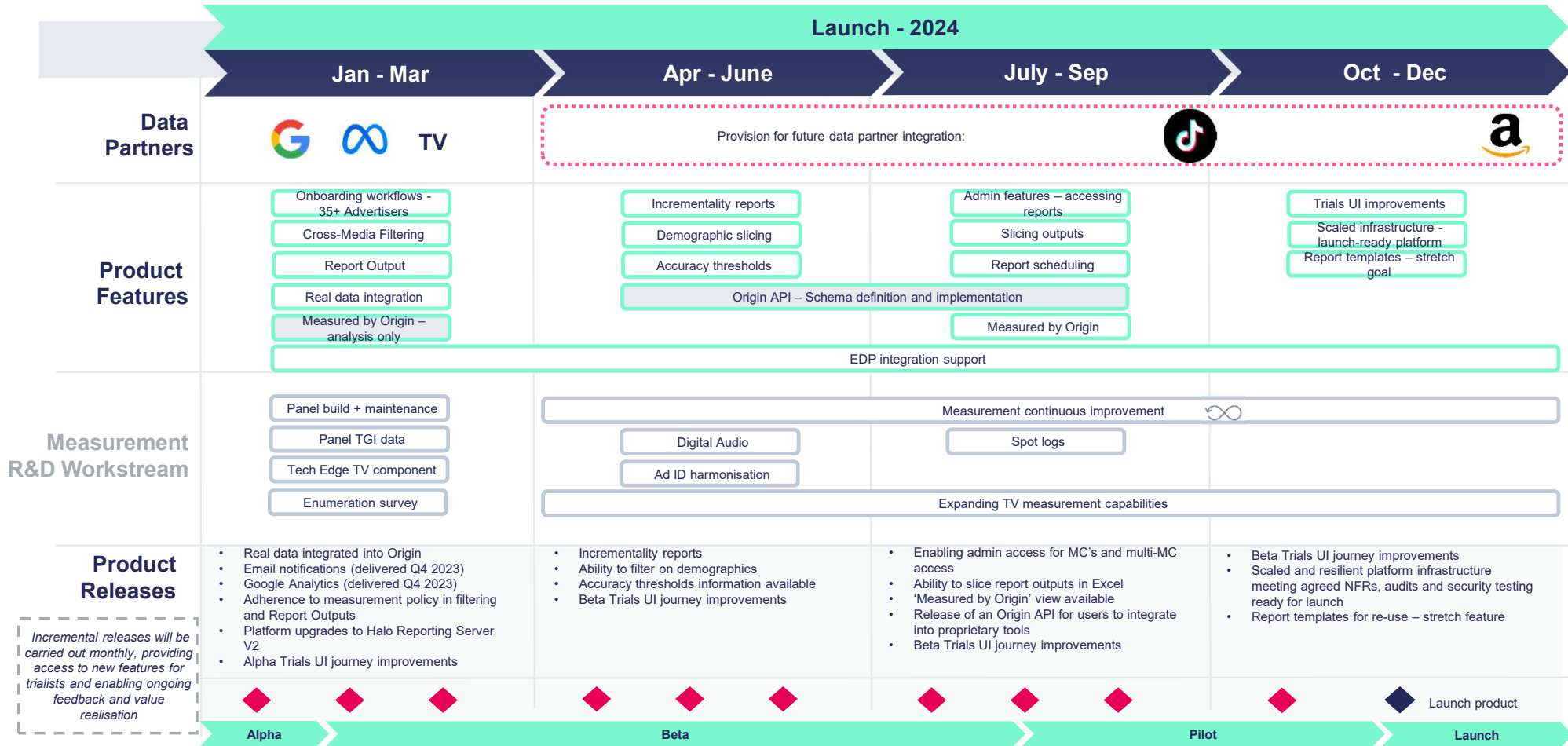
groupm	dentsu
IPA MEDIABRANDS	THE KITE FACTORY
IPA	+TBA

amazon ads	Google
∞ Meta	
theTradeDesk	

Launch Roadmap: TV, digital video & digital display....



Origin



Incremental releases will be carried out monthly, providing access to new features for trialists and enabling ongoing feedback and value realisation

... and integration of more media types post-launch

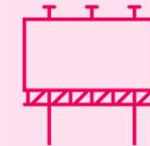


Origin

2024



Post-2024



...other channels will come on stream post-launch

64%

UK media spend

80+%

UK media spend

Q&A



Origin



Bhavin Balvantrai
Chief Market Analyst
OMG



Martin Lawson
Product Lead
Origin

I S B A

Rob Newman

**Director of Public Affairs
ISBA**



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Predicting the Future

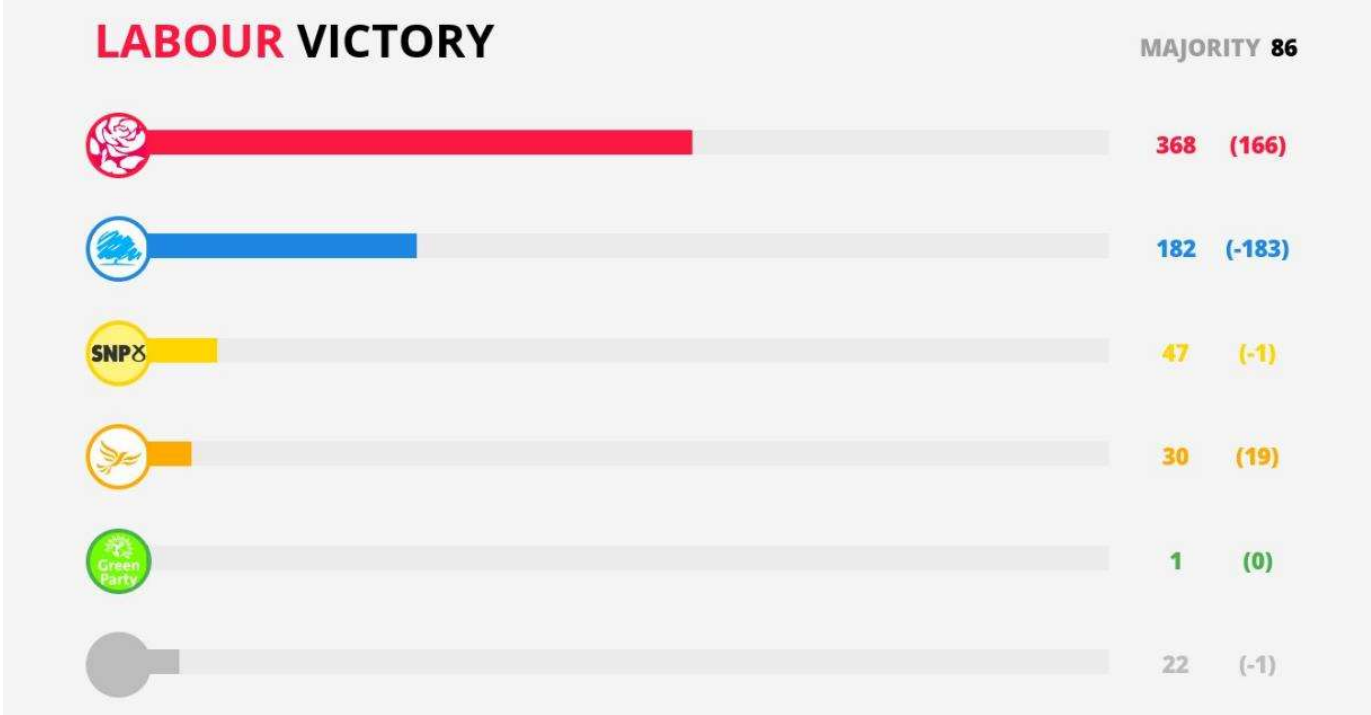
A General Election will be held this year (likely in October/November)

All the polling points to a change of government and a potentially substantial Labour majority

BUT the swing needed to achieve this is huge, and other election outcomes remain underpriced

We could see a hung Parliament and Labour govern as a minority, or some kind of deal with the Lib Dems

Everywhere they can voters are deserting the Tories, but the electorate remains volatile



Public Affairs: Where We've Been, Where We're Going



**'Less Healthy' Food and Drink:
implementation date deferral**

Channel 4 sale abandoned

Data Bill

Online Advertising Programme
consultation response: self-regulatory
system defence



Online Advertising Taskforce: ISBA
chairmanship of Age Assurance and
Influencer Marketing working groups

Labour Candidate dinners

Liberal Democrat issue engagement

**Strategic Policy Action Group helps
members navigate political and
policy change**



What would a Labour majority mean for marketers?

- 1** After years of chopping & changing, you can expect a clear policy programme, fewer reshuffles of personnel, and likely no changes in Government Departments. **You can plan with more certainty**
- 2** Government will be more active on the economy. There will be an Industrial Strategy, supported by sector taskforces. **Business will be expected to be a part of solving problems**
- 3** Public health is considered a key challenge and a fundamental part of rescuing the NHS and promoting wellbeing. **Labour will look to interested sectors to be responsible**, play their part, and put forward solutions
- 4** **Online safety will return to the agenda.** How platforms operate under the bonnet will come under the spotlight. Age assurance and digital identity will move up the agenda, with the question of minors' ownership of mobile devices moving into mainstream debate
- 5** There is not an overwhelming move to ban or regulate ads further, and there is a recognition it is a growth industry & global leader. But Labour has an ambitious agenda which may run into trouble. **Hitting advertising – seen as pain-free – will always be a temptation for politicians**

Next Steps

Be clear on what your business thinks about the key challenges confronting the next Parliament and Government ...

- Growth and Productivity
- Building a Greener, Fairer Economy
- Better Public Health and Wellbeing
- Strengthened Scrutiny on Societal Issues

... and be ready to play your part.

ISBA

Isabel Trew

**Senior Client Manager
Boots Media Group**



Mark Thompson

**Senior Experience Director
MESH Experience**



Clare O'Brien

**Associate Media Advisor
ISBA**



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I S B A

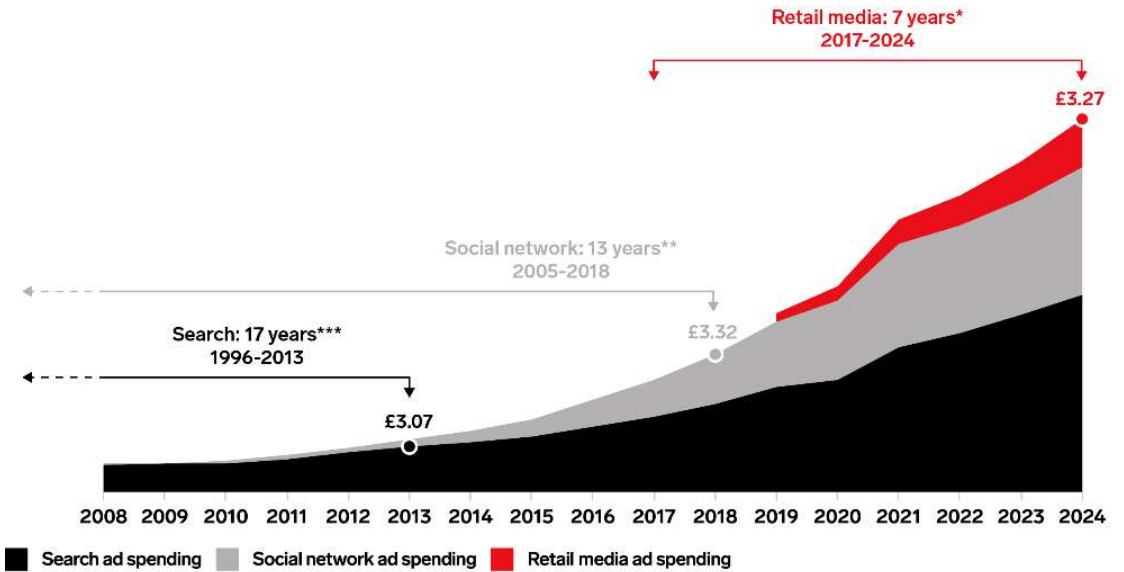
Standardising and exposing the retail media opportunity for brands



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The retail media wave has landed in Western Europe and is highest in the UK*

Digital Advertising's Third Wave Comes to the UK: Retail Media Reached £3 Billion Within 7 Years, Much Faster Than Search or Social Advertising
billions in UK digital ad spending, 2008-2024



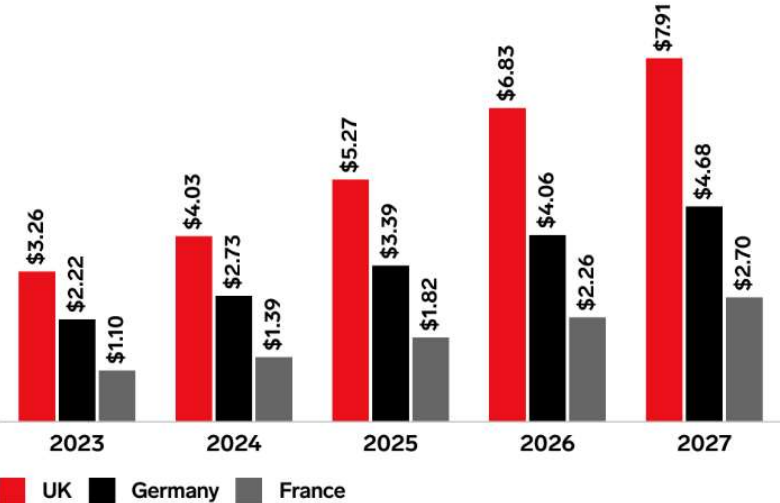
*Note: *Amazon launched Amazon Advertising in 2012, but 2017 was the year that Asda launched its Walmart Exchange ad platform in the UK to mark a competitive retail media landscape in the country; **Facebook first introduced advertising in 2005; ***OpenText ran the first pay-per-click ads showing up in search results in 1996*
Methodology: Estimates are based on the analysis of various elements related to the ad spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers, and other industry leaders.
Source: Insider Intelligence | eMarketer Forecast, Oct 2023



The retail media wave has landed in Western Europe and is highest in the UK*

The Retail Media Wave in Western Europe Will Crest Highest in the UK

billions in retail media ad spending in France, Germany, and the UK, 2023-2027



Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps
Source: Insider Intelligence | eMarketer Forecast, Oct 2023

*Insider Intelligence: France, Germany and the UK Retail Media Ad Spending Forecast 2024



ISBA's Responsible Framework for Retail Media Measurement



Availability of Data & Insights



Impression Definitions



"New" Data Methodology



Transparent Attribution Methodology

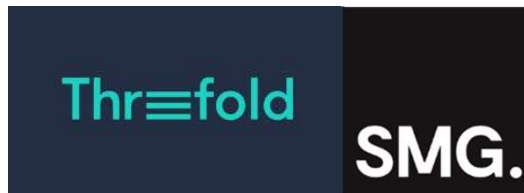


The long term value of retail media

MARK THOMPSON & ISABEL TREW



The number 1 health & beauty retailer with 16 million Advantage Card customers and over 2000 stores



Powered by industry experts with over 15 years' experience, leading the way for retail media



Activating campaigns for the UK's favourite brands



Retail media is the
fastest growing
area of marketing

It's going to be bigger than linear TV!



#DysonAirstrait

We wanted to understand the true & total value of our media

1. What can we learn about customer **behaviour** and **responsiveness** to different types of Media?
2. How does Boots Media fare within the **wider media mix**?
3. What **impact** does Boots media have on a shopper's **experience** of a brand?

ESTÉE LAUDER
24-HOUR WEAR 60 SHADES
COLLECT £10 WORTH OF POINTS

Seed, find your forever foundation with Estée Lauder's Double Wear Stay-in-Place Foundation SPF 10.

With a formula which is sweat, heat and humidity-resistant, it's the No.1 prestige foundation in the UK* that will keep you looking flawless with all day oil-control.

Plus, enjoy £10 worth of points when you buy two Estée Lauder products, one to be foundation.* **Hurry this offer ends soon**, add Double wear to your basket today!

Going, going

#boots.com

NEW FENTY BEAUTY HELLA THICC VOLUMISING MASCARA

Hella big, hella bold, hella thicc lashes
Thick & lifted lashes for voluptuous volume

Shop the Fenty range!

SHOP ALL

#boots.com

FENTY BEAUTY BY RIHANNA
FOR LASHES THAT LAST
SHORT LASHES

Seed, say hello to the NEW volumising baddie on the block – Fenty Hella Thicc Mascara.

Buildable, lightweight and transfer-resistant, this non-clumping formula lifts lashes with a simple flick of the wrist. Its tapered-bristle brush coats lashes from root to tip for extreme volume that lasts.

Run, don't walk, make it yours today!

Shop now

PROMOTION
KYLIE'S ICONS

Discover the viral sensations and most sought-after products from Kylie by Kylie Jenner. These are the iconic products you need in your beauty stash...

Hi I created Kylie Cosmetics to give my fans access to the makeup products that I love and use every single day to create my look. I love that make-up can make you feel confident and beautiful, and I want to share that feeling with you guys. TM
xxKylie

Make it matte
Who says every lip needs the Kylie Cosmetics Matte Lip Stain? It's the ultimate duo for long-lasting matte lip color. From everyday nudes to bold, vibrant shades, it's all here. Shake with the Lip Stain! Men: Mix with the Matte Lip Stain for great definition.

Gorgeous to-go
Revamp your morning routine with the Kylie Skin All-Over Mist. Set, SPF, gently exfoliate with the Foaming Face Wash (50ml), balance with the Skinia Hydrating Toner (100ml), boost radiance with the Primeo Serum (100ml), then finish with the Face Protection Cream.

Luxe lips
Formulated with squalene oil and shea butter, the Kylie Skin Lip Oil (10ml) The conditioning formula hydrates and softens, leaving lips smooth and visibly plumper. Apply to bare lips or shade or over lipstick to add extra shine, perfect from day to night.

Build your blush
Luxuriously smooth, Kylie Cosmetics Pressed Powder Blush (15g) gives a cooling, melt-in-the-mouth flush of color with buildable coverage. Whether you love a berry blush or a terracotta tone, the lightweight formula blends in easily for a soft glow.

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NEW GIVENCHY
GENTLEMAN SOCIETY

Seed, Givenchy redefines masculine fragrance with its NEW Eau de Parfum, Gentleman Society.

Striving towards creativity and authenticity, Gentleman Society makes a bold statement for those who reinvent the rules, and always act for the better.

Plus, receive a free travel size Givenchy Gentleman Society when you buy Givenchy Gentleman Society Eau de Parfum 60ml and above.*

I'm in

The research captures customer behaviour in the moment

BEFORE SURVEY

Survey to capture brand health metrics and imagery



DURING REAL-TIME

Diary to capture brand experiences real-time



AFTER SURVEY

Survey to capture brand health metrics and impact of experiences



4 key areas of focus

Exposure



NOTICEABILITY

Build Brand Equity



PERCEPTION



CONSIDERATION



RECOMMENDATION

BMG activity helps to make brands appear more innovative and different

Improvement in Brand Imagery

Boots Media Experience
is innovative,
2.52

Boots Media Experience is
different from other brands,
1.96

Source: Boots Media Group x MESH Experience, 2023
Experience Maximizer | Patterned bars = <90% significant

And more likely to recommend the brand to others

"I went into Boots in Bond Street [...] I saw new and **innovative skin serums** and I read the **advertising** and the claims it made and I had to try it based on the claims and the **packaging**. I am happy I bought the product and I feel privileged to be using a serum that is just **new in the market** and I will be the **first to use it among my friends and family group.**"

Boots Email Experience

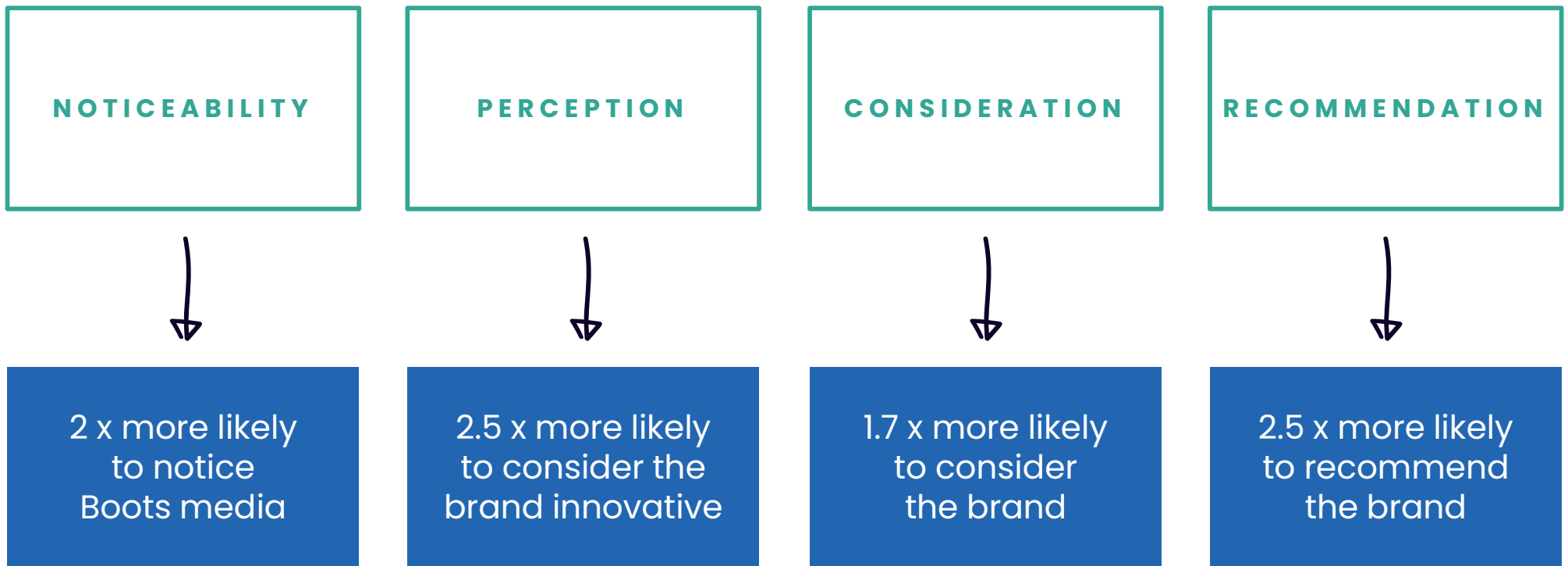
Participants who had a Boots experience:

2.5x

More likely to recommend the brand

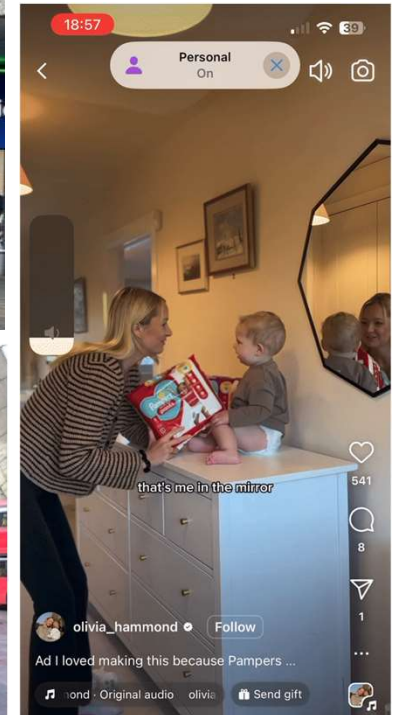
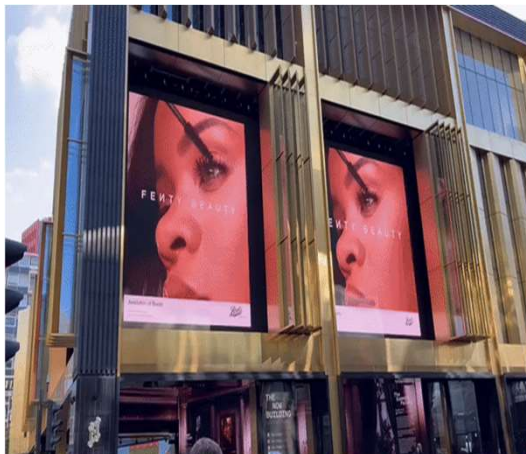
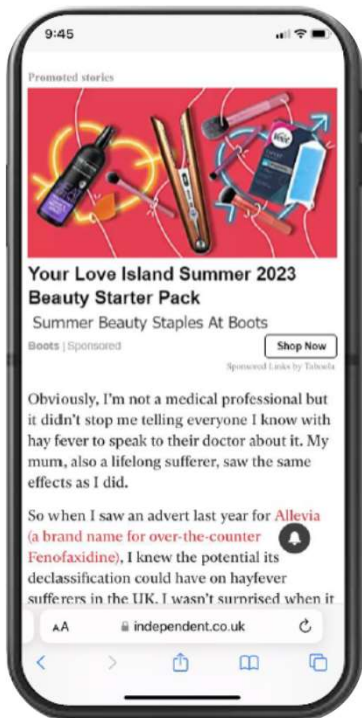
Source: Boots Media Group x MESH Experience, 2023
Experience Maximizer | Patterned bars = <90% significant

4 key takeouts from the study



70% of advertisers still identify conversion as their most important goal for campaigns that use retail media.

We have the tools facilitate brand building



The potential of retail media lies in its unique ability to unite brands and retailers



Let's talk women's health

FOR TOO LONG, WOMEN FELT EMBARRASSED TO TALK ABOUT WHAT WAS GOING ON WITH OUR BODIES. BUT NEW RESEARCH SHOWS THIS IS CHANGING

55% of women feel embarrassed to talk about their health

65% of women feel embarrassed to talk about their health

82% of women feel embarrassed to talk about their health

Yes, your pharmacist can help

Boots pharmacist pharmacist... **Here to help**

For more advice visit [boots.com/healthhub/womens-health](https://www.boots.com/healthhub/womens-health)

health

6 Things Your Period Can Reveal About Your Health

You should pay attention to unexpected changes during your period.

1. Your weight, blood pressure, and heart rate are standard measurements healthcare providers use to gauge your health. But there's another body function you should consider when trying to get a sense of what's going on in your uterus: your period.

Targeted period care

Shop now

In store | boots.com | App

Boots UK

Sponsored (admo)

Boots Price Advantage gives you up to half price off 100s of healthcare products

Save up to 1/2 price

Unlock 100s of lower prices today

Shop now

In store | boots.com | App



Women's health advice

KEY TOPICS

- Menstrual
- Pregnancy
- Periods
- Sexual health
- Contraception
- Menopause

Vitabiotics

hairfollic

Shop now

Save up to 1/2 price

Unlock 100s of lower prices today

Shop now

VIAGRA CONNECT

Our health is as individual as we are

Periods, fertility, immune health and beyond – each woman's experience is individual to them.

Which is why we're helping people find health and wellness support, with a selection of products designed to support through each stage – from period care to skin supplements and more.

With offers across our unrivalled range, finding the right health support just got easier.

SUPPORT VITAMIN D LEVELS

For effective immune support, there's Boots' range of vitamins D and omega-3. These convenient gummies are great for those who struggle to get their vitamin D levels up.

HELP MAINTAIN SKINS APPEARANCE

Immunity is the first line of defense against skin issues. Our Immunity gummies contain vitamin C to help support normal collagen formation for the normal function of the skin and to protect against free radicals.

SUPPORT WITH CONCEPTION

Enhance the comfort of intense sexual contact with The Social Fertility Lubricant. The aqueous and PH-balanced formula mimics female fluids, helping couples enjoy their – and their couples trying to conceive.

SUPPORT VITAMIN INTAKE

From pre-conception to pregnancy, My Expert Fertility's supplements for women use plant-based vitamins and minerals to support mother and baby, including vitamin C, which contributes to the maintenance of normal bones.

FIND COMFORTABLE PERIOD CARE

For period care that's eco-friendly, naturally soft, gentle on your skin, and 100% organic cotton and bamboo, FLED tampons, pads & liners are also gentle on your skin and biodegradable. FLED is a new way of doing period care that's gentle on your skin.

HELP PREVENT BLEEDING GUMS

For healthier gums and stronger teeth, try Corsoil's Complete Protection Toothpaste. It gently whitens and targets bad bacteria to help prevent a messy brush choice.

LIFE STAGE SUPPORT

Vitabiotics have a range of support through different life stages with expert nutritional care. Progesterone, Menopace and Vitabiotics contain

Thankyou

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Isabel.trew@bootsmediagroup.com

ISBA

Eileen Hanna

**Head of Premium Gins
Diageo**



Bobi Carley

**Head of Media
ISBA**



**One
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ISBA

Q&A



One Voice

I S B A

Thank you for joining us.

**One
Voice**