

UK ADVERTISING EXPORTS REPORT 2019



**ADVERTISING
ASSOCIATION**





UK ADVERTISING: AN EXPORT POWERHOUSE

Stephen Woodford
Chief Executive, Advertising Association



Welcome to our first annual UK Advertising Exports Report. As you will read in the following pages, our industry has continued to grow its exports of advertising services. These now stand at £6.9 billion, an increase of 18% on the figures for 2016 and we have the largest trade surplus in Europe.

The figures in this report demonstrate how much UK advertising’s creativity and effectiveness are valued on the world stage. Put simply, international buyers of advertising and marketing services come to the UK to access the expertise they need to grow their businesses.

The timing of this report neatly bookends an important period of change for the UK. The latest ONS export data covers the first full year following the vote to leave the European Union in June 2016 and is published as we reach the final act in that decision to exit. UK advertising’s success acts as a good indicator that any industry with world-leading skills, knowledge and knowhow is highly attractive even during uncertain political times.

The success of UK advertising has not simply happened by chance; our industry competes hard on the world-stage. We win more Cannes Lions awards than any other country in Europe and more than anywhere else in the world on a per capita basis – numbering over 1,500 since 2005. Among the respondents to the new survey in this report by UK advertising’s think tank Credos, nine out of ten businesses generate income overseas. Overseas clients account for nearly a third of total revenue.

It is clear UK advertising is thriving world-wide, thanks to the brilliant talent working in our industry who blend creative, strategic and technical expertise to produce world-class work. It is also important to recognise the Credos survey notes 80% of UK advertising businesses employ non-British nationals. Everyone in our industry plays a role and maintaining access to the right international skills, as well as ensuring our homegrown workforce is from as diverse a base as possible, is vital for our future success.

This report also includes a selection of case studies from British businesses producing work for clients around the world. They are fantastic examples of how we can flourish by being agile, creative and entrepreneurial in our approach to exporting to international markets.

Everyone involved in UK advertising should be part of the congratulations on this export story. This is just the beginning of what our sector, a proud member of the UK’s world-class creative industries, is capable of. The future of exporting our sector’s services, indeed UK creativity, around the world is in our hands.

THE DATA: ONS ANNUAL SURVEY OF INTERNATIONAL TRADE IN SERVICES

The Office for National Statistics’ (ONS) Annual Survey of International Trade in Services collects information on the imports and exports of different services, and its results are used heavily by the Department for International Trade (DIT) and the International Monetary Fund (IMF).

The latest release attributes an annual export figure of £6.9 bn to advertising for the year ending in December 31, 2017.¹

The figure represents an increase on the figure of £5.8bn that was registered in 2016. This amount, which includes the export of advertising services by all UK companies (including, for example, TV and film production companies making ads for foreign buyers), is the first measure of export value released since the result of the referendum on EU membership in June 2016.

Exports of companies defined as advertising and marketing accounted for an estimated 46% of the total value of advertising services exports. Information and communication companies, incorporating production and tech companies contributed 32%. Other significant contributors to the total value of advertising exports included administrative and support services; arts, entertainment and recreation; wholesale/retail trade; financial and insurance activities; and manufacturing.

The value of advertising exports in 2017 represents an increase of 18% on the previous year, outstripping UK service exports overall which grew by 7% in comparison.²

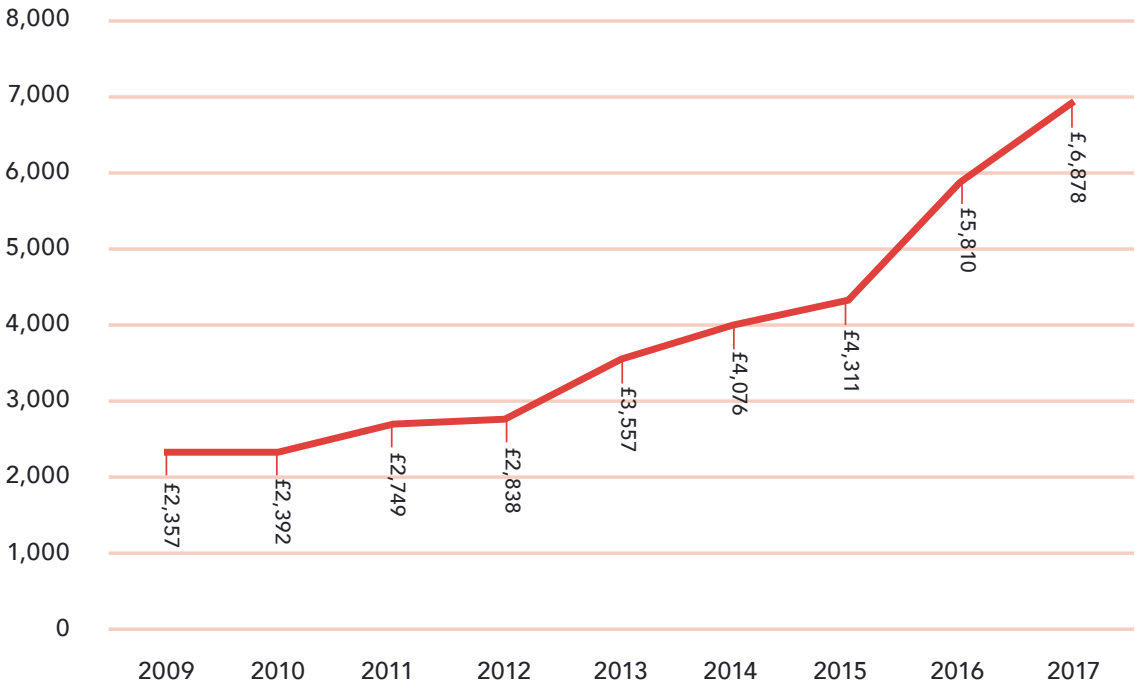
The UK’s balance of payments surplus for advertising was the biggest in Europe - £3.8 billion, while the export of advertising services has nearly tripled in less than a decade, up from £2.4 billion in 2009.



ANNUAL UK ADVERTISING EXPORTS GROW TO £6.9 BILLION

HOW MUCH HAVE UK ADVERTISING EXPORTS GROWN?

Value of UK exports in advertising services 2009-2017 (£ millions)



The £3.2bn exported to EU nations, represented 55% of advertising exports. The percentage of all UK advertising exports going to Europe, including both EU and non-EU countries, was 59%.

The USA remains the largest market for UK advertising services in terms of individual country, taking £1.1bn of UK advertising services exports. This was followed by France (£655m), Germany (£619m), Ireland (£454m), and The Netherlands (£350m)³.

¹ Unless otherwise stated all data in this section is sourced from Office for National Statistics (2019), International trade in services, UK: 2017 <https://www.ons.gov.uk/businessindustryandtrade/internationaltrade/bulletins/internationaltradeinservices/2017>
² Office for National Statistics (2019), The Pink Book: 2018 <https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/bulletins/unitedkingdombalanceofpaymentsthepinkbook/2018>
³ Data taken from ONS Annual Survey of International Trade in Services 2016. We anticipate these proportions to be similar in the latest data.

HOW DOES ADVERTISING COMPARE TO OTHER INDUSTRIES?

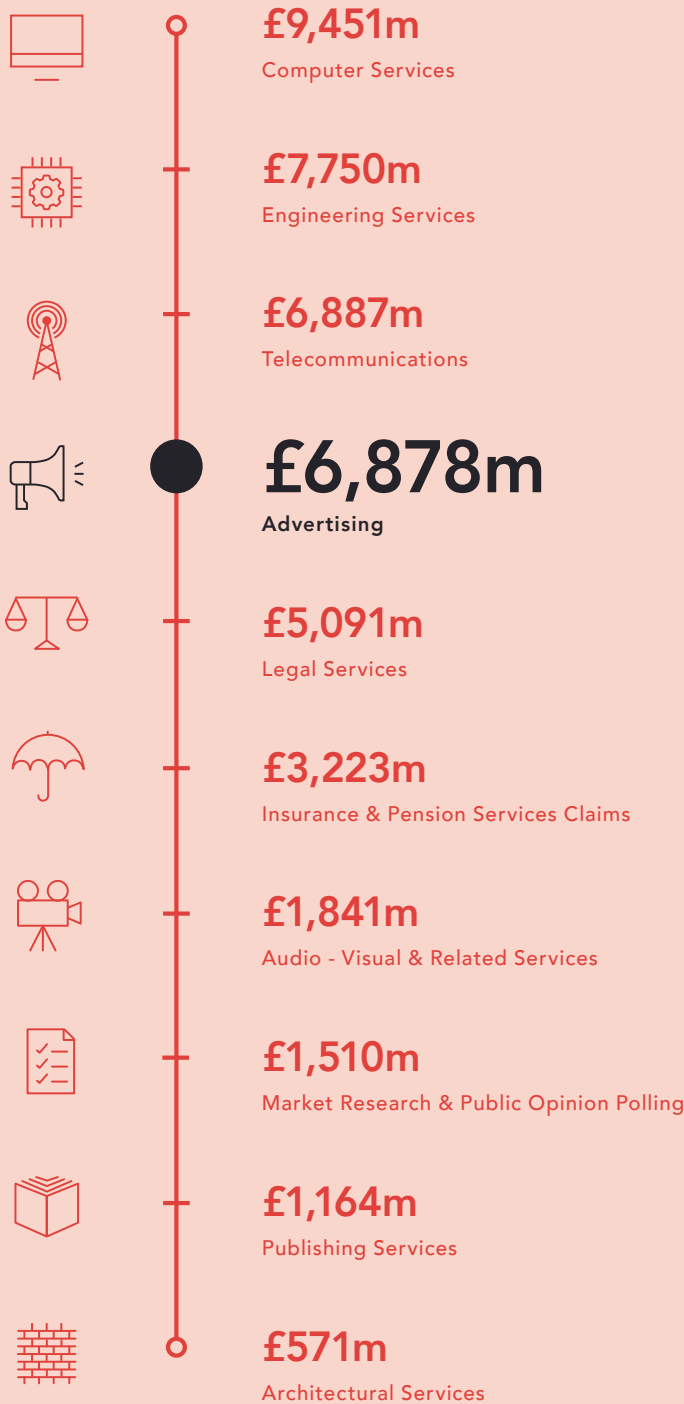
Growth in advertising exports between 2016 and 2017 was higher than that for several other key areas of the UK economy, including financial services (8%), insurance (7%), legal services (2%), engineering services (6%) and telecommunications (-20%). As can be seen in the chart to the right, advertising services yield more export value than other key industries such as legal, insurance and pensions, audio visual and publishing.

METHODOLOGICAL NOTE:
The Office for National Statistics (ONS) annual Survey of International Trade in Services (ITIS) collects information on the imports and exports of 52 different types of services. It shows the import and export activity of UK companies overseas and is the main source of information for UK trade. ITIS data are an important element of the UK's Balance of Payments (BoP) and contributes towards the measure of Gross Domestic Product (GDP).

ITIS data are based on a quarterly sample of approximately 2,200 businesses and an annual sample of approximately 15,500 businesses. The survey data from both the quarterly and annual results are combined to produce the annual ITIS estimates.

In 2013, advertising services was combined with market research and public opinion polling services, previously two discrete categories. As such, Credos reached the £6.9 bn figure for advertising services by taking the average ratio of advertising verses market research and public opinion polling exports between 2009-2012 and applying the same ratio to the 2017 combined total. This approach has been quality checked and assured by the ONS.

TOTAL EXPORT VALUE OF ADVERTISING SERVICES AND OTHER COMPARABLE INDUSTRIES (£ MILLIONS)



NEW BUSINESS MOVES: THE AAR VIEW

The marketing services consultancy AAR has been gathering research from the UK advertising sector on opportunities and enquiries for creative agencies in the previous 12 months. In this piece, AAR CEO Kerry Glazer looks into some of the findings of their latest research.

To support the UK advertising industry's export ambitions, we gathered information from a broad spectrum of agencies – varied by size and ownership – in order to ascertain whether they have seen any increase in the number of enquiries they have received from outside the UK and, if so, what the sources of these enquiries were.

It was encouraging to find that 46% of agencies surveyed reported that they had witnessed an increase in the number of enquiries from brands outside the UK. Half of the agencies responding felt the number of enquiries had remained the same, with only 4% reporting a decrease.

There was a wide variation in the countries from which the enquiries emanated but the majority of brands based in international markets who were approaching UK agencies were from USA, Germany, Italy, Saudi Arabia, Switzerland and China.

Unsurprisingly, the sources of enquiry were a mixture of direct approaches from new clients or from those with who agencies had previous relationships, and for those agencies who were part of holding company or micro networks, enquiries received via network agency colleagues.

Looking forward, the UK new business market continues to be very buoyant, with most agencies reporting an uplift in the number of pitches they are participating in and – in some cases – having to turn down by reason of lack of capacity. May this buoyancy continue during the weeks and months ahead as our trading relationship with the EU and the wider world evolves.



Kerry Glazer, CEO, AAR



The findings of the following industry survey from Cremos are a good indicator of the global reach of our advertising industry. UK advertising and marketing services have led the world for years and we've done this by being more energetic, more creative and more international than our competitors.

Nine out of ten who answered our survey said they generate income in foreign markets and overseas clients account for a third of revenue. Right now, the EU remains a very important market with nine out of ten exporters who responded working for clients in the bloc.

As we look to the future it is essential that our industry grows in confidence and conviction to be even more engaged with the world beyond our borders. With this in mind, it's heartening to see almost two thirds of businesses in the survey participated in overseas events and a fifth of those have been on Department for International Trade missions. The efforts of our partners in UK government should be recognised and praised as they work hard to open up opportunities for UK advertising businesses in new markets.

For UK creative industries like ours – and the employees within them – to continue to thrive we need bold

policies in key areas like talent, regulation and exporting. Our future lies in being more open to bringing in talent from anywhere in the world. If we're trying to win a large global contract we may need to hire one or two people from key markets overseas – I know from my own experience that one win can generate many jobs for UK citizens around those key foreign recruits.

Future migration policy has to keep a talent pipeline flowing so we continue to be at the top of our game. We also need a regulatory environment that means international businesses are even more drawn to the UK than they are already.

But it is ultimately up to us in the UK advertising industry to go out with renewed confidence in our creative, strategic and technological prowess to be the best on the world stage.

A WORLD OF OPPORTUNITY

by James Murphy, Group CEO, adam&eveDDB
and UK Advertising Exports Champion



EXPORTING ADVERTISING: CREDOS INDUSTRY REPORT

Advertising's think tank Credos surveyed over 100 providers of advertising and marketing communications services to benchmark the export activity of the UK advertising sector. The findings show high levels of export activity, supporting previous Credos research – notably in its Advertising Pays 4 report – which has shown the UK to be a world leader in advertising exports.⁴

SURVEY METHOD

- An online survey was distributed by the Advertising Association's trade body members and other supporters (Advertising Producers Association, Direct Marketing Association, Internet Advertising Bureau, Institute of Practitioners in Advertising and the Market Research Society from the trade body world, AAR Group, London & Partners from business, and Campaign and Little Black Book from across the media).
- 120 providers of advertising and marketing communications services responded representing over £1 billion in turnover.





⁴Credos (2016), Advertising Pays 4: Export value and global impact

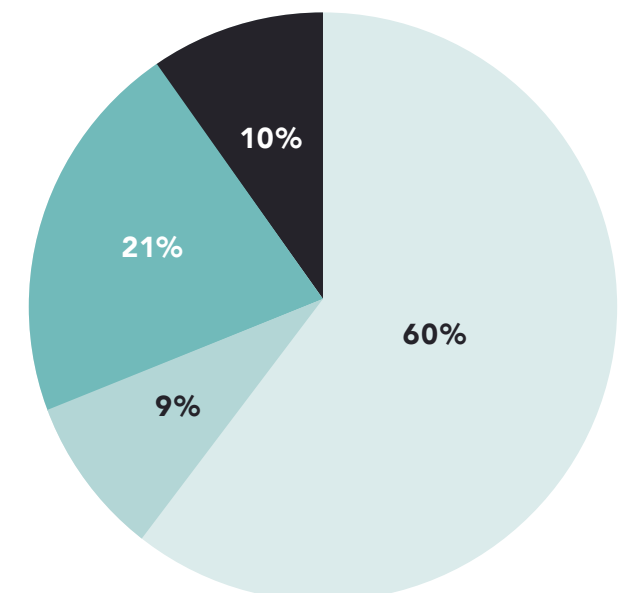


EXPORTS

Nine out of ten (87%) businesses surveyed generate income overseas, with overseas clients accounting for an average of 31% of revenue where known.

SALES TO UK AND NON-UK CLIENTS AS A PERCENTAGE OF REVENUE GENERATED (AVERAGE)

-  Sales to clients based inside the UK where work is delivered inside the UK
-  Sales to clients based inside the UK where work is delivered outside the UK
-  Sales to clients based outside the UK where work is delivered inside the UK
-  Sales to clients based outside the UK where work is delivered outside the UK

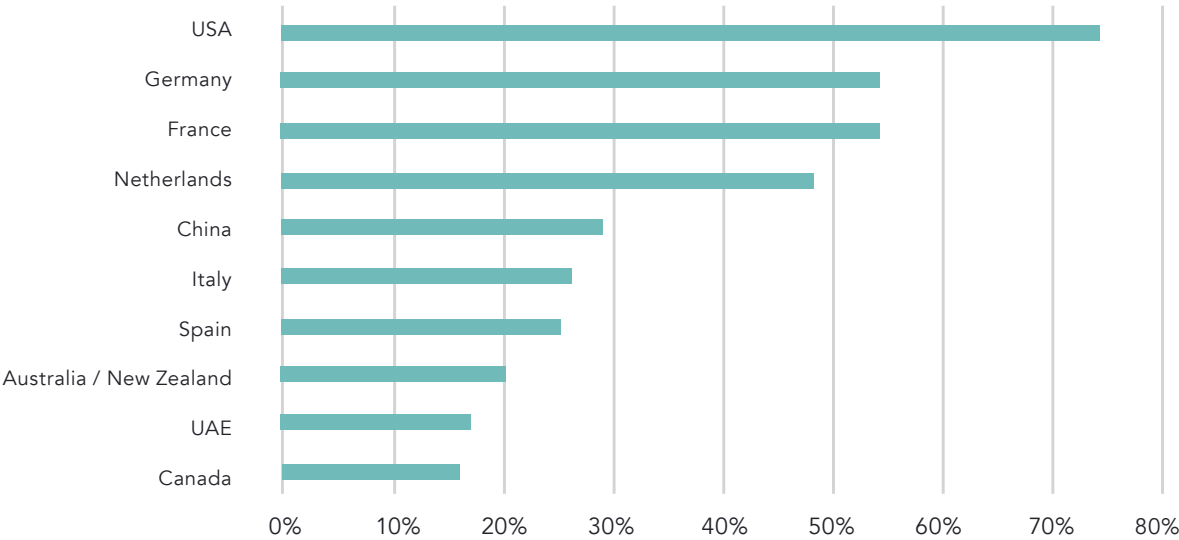




High levels of export activity were not limited to large companies, with both small and medium sized companies generating a similar proportion of their revenue from exports. Meanwhile, over a third (35%) of businesses surveyed claimed to operate as a regional or global hub for their clients, reflecting the UK’s role as Europe’s advertising capital.

The EU is the primary destination for UK exports, with nine out of ten (89%) exporters servicing clients in EU markets. The EU is followed by the USA at 74%, with China in third place at 29%.

**PERCENTAGE OF BUSINESSES
SERVICING CLIENTS IN EACH MARKERT**



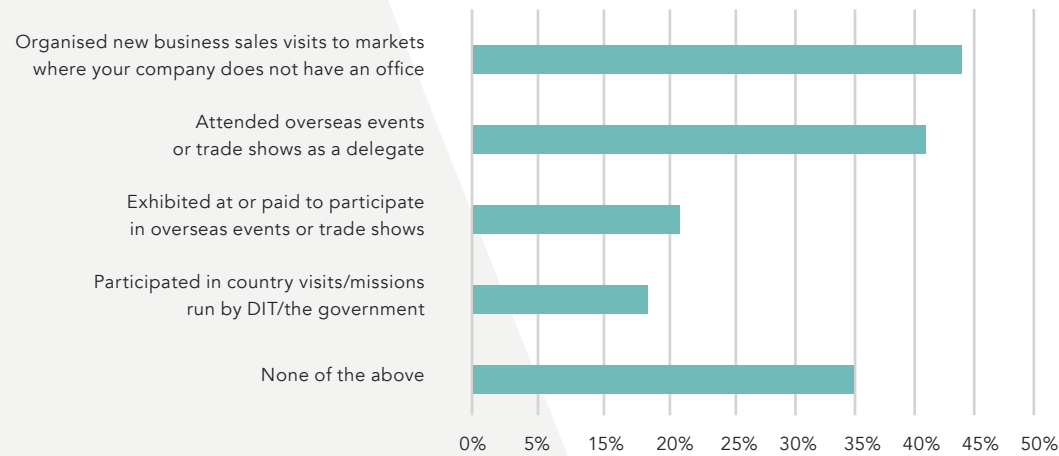
The running order illustrated above is in line with that shown by research carried out by the Advertising Association in December 2017. These findings illustrate the continued need for easy access to EU markets for advertising and marketing communications services post-Brexit.⁵

INTERNATIONAL OUTREACH

Most businesses surveyed (65%) participate in overseas events, with the most popular activities being sales visits and trade shows. Nearly one in five (18%) have taken part in DIT trade missions – up from 12% in 2017. A minority but nonetheless significant proportion of businesses surveyed reported taking part in no overseas events (35%). These businesses were exclusively SMEs.

⁵Advertising Association (2017), International Trade Survey

PROPORTION OF BUSINESSES
ATTENDING OVERSEAS EVENTS

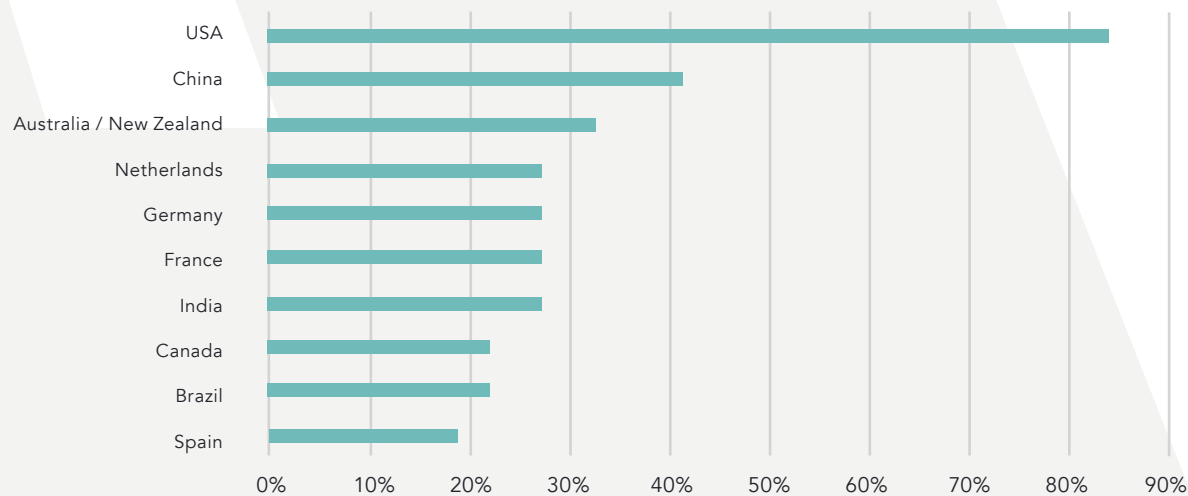


The most popular events to have attended were Cannes Lions (49% of respondents), SXSW (29%), Advertising Week New York (14%) and the Mobile World Congress (13%).

OVERSEAS OFFICES

A third (35%) of businesses surveyed have overseas offices, the top locations for which are the USA, China and Australia/New Zealand. The relatively low proportion of businesses with offices in other European markets provides further evidence of the UK’s role as a regional hub for advertising and marketing communications services.

PERCENTAGE OF BUSINESSES WITH
OVERSEAS OFFICES BY LOCATION



Nearly a quarter (24%) of businesses surveyed are owned, either in full or in part, by an overseas company. Three quarters of owning companies are located outside of the EU, further reflecting the popularity of the UK as a destination for global businesses looking to expand into Europe.

TALENT

Eight out of ten (80%) businesses surveyed employ non-British nationals, supporting the findings of previous Credos research which has shown the UK advertising industry to be a magnet for global talent.⁶ This figure was even higher among businesses surveyed in London, with nine out of ten (90%) employing non-British nationals.

Among employers of overseas talent, non-British nationals account for an average of 17% of the workforce. Almost all these businesses employ non-British EU nationals, who make up an average of 14% of the workforce (or 82% of all overseas talent). Although high, this figure has fallen in recent years from 19% in 2016 to 17% in 2017. While these figures are not directly comparable and should be treated as indicative, the decrease shown provides weight to the concern expressed by these employers about the impact of Brexit on their continued access to EU talent.

Over two thirds (69%) are concerned about retaining non-British EU members of staff post-Brexit while over half (57%) are concerned about their ability to recruit new international staff. These findings paint a picture of an industry that is keen to maintain open links with the rest of the world post-Brexit, and one which values being able to access to the very best talent from around the world.

SUMMARY

- UK providers of advertising and marketing communications services, large and small, show high levels of export activity, with nine out of ten servicing international clients and a third operating as a global or regional hub for their clients.
- EU markets and the USA are integral to the exporting success of UK businesses.
- Non-British EU citizens make up a significant proportion of the advertising workforce, and many employers are concerned about recruiting and retaining international staff post-Brexit.

⁶ Credos (2017), Advertising Pays 6: World class talent, world class advertising

EXPORT VALUE AND GLOBAL IMPACT OF UK ADVERTISING

ANNUAL UK EXPORTS
OF ADVERTISING SERVICES
WORTH £6.9 BILLION



CREATIVE LEADERSHIP
THE UK HAS WON MORE
CANNES LIONS THAN
ANY OTHER EUROPEAN
COUNTRY



£3.8 BILLION THE UK'S
BALANCE OF PAYMENTS
SURPLUS FOR ADVERTISING
IS EUROPE'S BIGGEST



BOOSTS THE
INTERNATIONAL SUCCESS
OF UK BRANDS



FOSTERING GLOBAL
STANDARDS OF
SELF-REGULATION



THE EU ACCOUNTS
FOR **55% OF**
ADVERTISING EXPORTS



UK ADS HAVE **INSPIRED**
SOCIAL CHANGE
WORLDWIDE



THE TOP 20 UK
AGENCIES HANDLE **OVER**
£3 BILLION IN BILLINGS
FROM OVERSEAS CLIENTS.



UK ADVERTISING
ATTRACTS THE BEST
TALENT FROM
AROUND THE WORLD



INCREASES INWARD
INVESTMENT



9 OUT OF 10 BUSINESSES
GENERATE INCOME
OVERSEAS, WITH OVERSEAS
CLIENTS ACCOUNTING FOR
AN AVERAGE OF 31% OF
REVENUE



"THE NUMBER ONE REASON CLIENTS
GIVE FOR CHOOSING A LONDON
AGENCY IS THAT THIS CITY IS **A MAGNET**
FOR GLOBAL TALENT"

TOM KNOX
EXECUTIVE PARTNER, MULLEN LOWE GROUP

A GREAT ADVERT FROM BRITAIN

This month, we are celebrating our first-ever Export Month and we have just returned from trade missions to the Shanghai International Advertising Festival in China, SXSW in the USA, and a special trade delegation to meet advertisers and agencies in Tokyo. In total, over 100 businesses have been involved in selling UK advertising and marketing services to international markets.

Export Month marks the end of the first twelve months for Promote UK, our industry group, which partners with the Department for International Trade to showcase our country as the global hub for world-class advertising.

A month-long programme of activities, including this report and our Leadership Breakfast during Advertising Week Europe, is just the start of our ambitions with Promote UK. We are planning a strong UK advertising presence at the Cannes Lions International Festival of Creativity in June and we have much more lined up at industry events across the world in the coming months. We welcome any business looking to grow their international revenue streams or to attract inward investment into the UK to get in touch with us.

In the meantime, I think it only right to reflect on the UK advertising industry's success on the world stage and on the opportunities ahead. In these next few pages of the report you will find a selection of case studies that demonstrate the breadth, depth and strength of what our industry has to offer the world, today and in the future.

JANET HULL OBE

Chair Promote UK and Director of Marketing Strategy, IPA



EXPORTING OUR UK EXPERTISE GLOBALLY

Agency: adam&eveDDB, Client: Samsung



BUSINESS: **ABOVE+BEYOND**

CLIENT: **ONEPLUS**



ABOVE+BEYOND brings together diverse talents from the worlds of film, music, PR, branding, production, media and advertising to help clients create enduring cultural connections between their brands and their audiences.

The OnePlus brand

Entering the smartphone scene only four years ago, in 2014, Chinese manufacturer OnePlus seemingly came from nowhere to sell more than 1.3 million units of its first handset.

OnePlus has a huge community of fans, including 1.3 million forum members from more than 183 countries, who help guide all product development through their feedback. It's a brand formed on co-creation, relentless development and one which has been growing year on year across the globe.

The relationship

Since winning the pitch in 2018, ABOVE+BEYOND's relationship with OnePlus has gone from strength to strength. As the brand grows into

different markets, the relationship remit has expanded to deliver product launch campaigns in Europe, China, North America and India across a mixture of on and offline channels.

ABOVE+BEYOND's ability to adapt to different working methods and to use technology to collapse geographical boundaries, has been key to their exporting successes. Their adoption of wechat as primary communication method has ensured that potential obstacles like Firewalls haven't affected the projects. Similarly, a shift in working patterns to fit in with international time-zones has been essential to keep to deadlines and also to keep consistency with team relationships.

This nimble and agile approach has enabled them to work with OnePlus to create award-winning campaigns which reflect the progressive nature of the brand. Their #NeverSettleFilm campaign – where the OnePlus community directed advertising via the YouTube comments box - was the most successful device launch in OnePlus history, while the business' Unlock Your Speed app for the OnePlus 6T device engaged over half a million users and grew the OnePlus fanbase by 200% globally.

No one size fits all when it comes to exporting creativity, but ABOVE+BEYOND have found a nimble and flexible approach to client relationships, and creative platforms which work on both a global and local level, to be crucial to their successful relationship with OnePlus.



BUSINESS: **adam&eveDDB**

CLIENT: **SAMSUNG**



This is a story of how a British creative agency has been able to export British creativity in order to deliver commercial success for a Korean tech brand across priority markets in North America, Europe and Asia. Most importantly, it's a story of how they managed to do so in a way which generated a strong new revenue stream that made a positive difference to the bottom line in the UK, bringing prosperity and creating jobs within the UK.

adam&eveDDB began working with Samsung in 2016 after winning a pitch from London to supply creative services for the vital North American market. Since then they have delivered further global and regional campaigns across a range of product categories such as mobile devices, consumer electronics and domestic appliances.

Their creative and commercial success in doing so has required strong collaboration, visiting key markets to understand consumer behaviour, engage stakeholders, and to validate strategic and creative thinking.

Establishing an office in New York has enabled them to supply strategic, creative and production services on both sides of the Atlantic in a way that is both agile, and scalable depending on the demands of the business. But the benefits of working with Samsung globally have been harnessed in a way which returns 75% of the revenue to adam&eveDDB's headquarters in London, thereby driving profitability and creating jobs in the UK.





BUSINESS: **CROWD**
CLIENT: **NAPA VALLEY FILM FESTIVAL**

Crowd is an independent global creative agency with a reputation for helping brands grow their audiences, sales and brand awareness across the world. The scope and diversity of their work allows them to provide clients with local knowledge and global reach from 12 offices in six countries – from San Francisco and London, to Dubai and Shenzhen.

A recent example of an exporting campaign is the Napa Valley Film Festival project. The festival presents over 100 new independent films and gives the opportunity for guests to interact with filmmakers and industry panels - as well as wine tasting and culinary demonstrations against the stunning Napa backdrop. Crowd was tasked to create digital marketing campaigns that would help streamline a more user-friendly ticket purchase process.

Crowd designed and built a series of campaign landing pages to sit within the current main website structure and used social media advertising to drive people to these pages. An 'accordion style' page design was chosen to fully showcase the features of the festival while remaining user-friendly and easy to navigate. The functionality on each landing page enabled people to both navigate between different passes (e.g. weekend vs 5 day) as well as different themed highlights

of the festival by clicking on 'Culinary', 'Wine', 'Film' and 'Nightlife' to find out more about what they were specifically interested in. Crowd targeted different social video advertising creatives to highlight these themes to capture people's attention in newsfeed.

Overall, Crowd surpassed the forecasted performance metrics, including 39.6% more clicks to the website and a cost-per-click 26.2% lower than predicted. The average click-through-rate was well above industry average at 4.15%. And more importantly, most of the events were sold out!



BUSINESS: **DAZN**
CASE STUDY: **EXPORTING SPORT STREAMING AROUND THE WORLD**



DAZN is the world's first pure sport live and on-demand streaming service. Founded in the UK, DAZN is aiming to be the world's number one sport broadcaster. Since launching in 2016, they are live in nine countries across four continents: Germany, Austria, Switzerland, Italy, Spain, Canada, the US, Japan and Brazil.

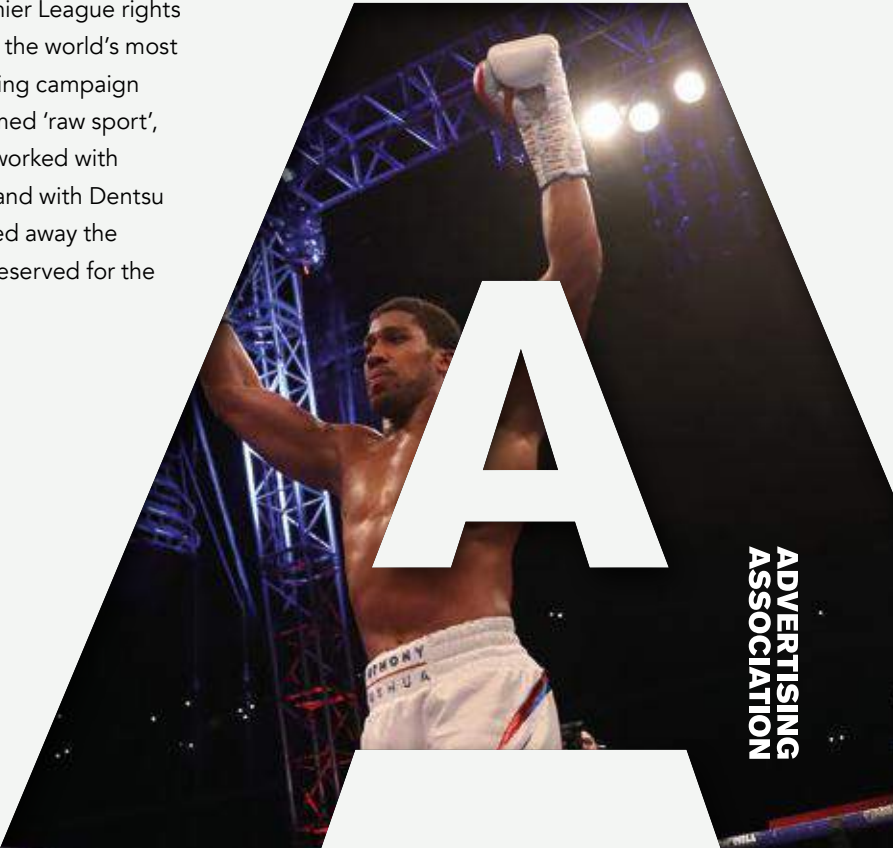
DAZN is the world's biggest sport broadcaster by volume, streaming more than 250 million hours of content to fans every year. The business' software developers are creating a market leading product, based in the UK, Poland and the Netherlands to power global expansion plans. In the past year alone, DAZN hired almost 1,000 employees in the UK, with offices in London and Leeds, increasing its global workforce to almost 3,000.

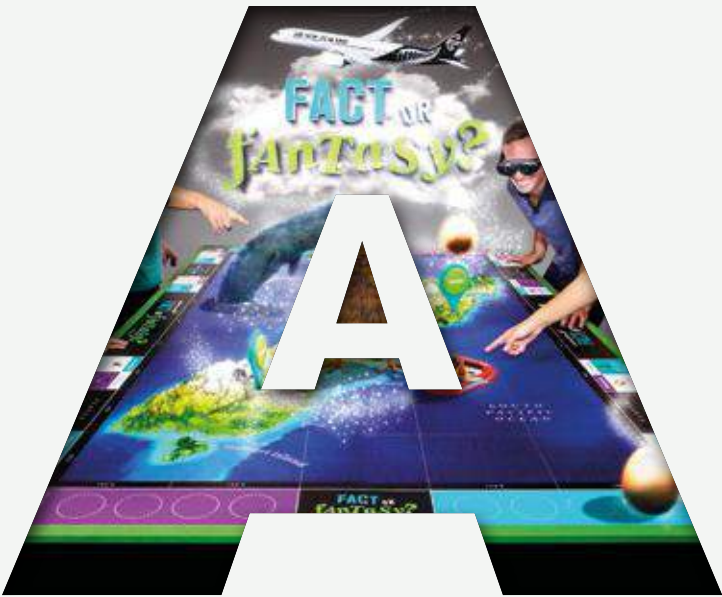
The sport streamer recently introduced advertising on the platform for the first time, offering global brands an invaluable opportunity to engage fans around their passions. Volkswagen was the first brand to associate itself with sport on the platform, with betting brands Tipico and Bwin following suit.

Through its global reach, DAZN is transporting some of the UK's biggest sporting exports to global audiences. They recently launched in Spain with exclusive Premier League rights to bring the best of British football to some of the world's most passionate football fans. A nationwide marketing campaign announced DAZN's arrival in the market. Themed 'raw sport', DAZN's in-house creative and media agency worked with McGarry Bowen London on the creative side and with Dentsu Aegis on media buying. The campaign stripped away the gloss to reveal the sights and sounds usually reserved for the athletes rather than spectators.

In September 2018, DAZN launched in the US with a stacked line up of fight sports. Through their \$1 billion deal with Matchroom Boxing and ground-breaking partnership with Golden Boy Promotions and Canelo Alvarez – the richest contract for an athlete in sporting history – they will broadcast 100+ stacked fight nights every year. In the first six months of operation, this British sport streaming service has streamed nearly 300 hours of boxing coverage.

In 2019, DAZN is bringing the biggest brand in British boxing, Anthony Joshua, to the US to make his debut at Madison Square Garden. One global British export championing another to take on the world.





BUSINESS: **FRAMESTORE**
CLIENT: **AIR NEW ZEALAND, MAGIC LEAP**



From a start-up in Soho to 2,000 employees based across London, New York, LA, Chicago, Montreal, Beijing and Pune, Framestore works with some of the world’s most prestigious studios, brands and franchises to bring extraordinary ideas to life through creativity, innovation and technology. Its work is exported all over the globe, you’ll have seen it everywhere from cinemas and TV screens to theme parks, VR/MR/AR headsets and during ad breaks for events such as the Oscars, Olympics and Super Bowl.

Air New Zealand wanted to harness new technology to engage their customers while also promoting New Zealand’s unique features and qualities. Working with mixed reality headset pioneer, Magic Leap, Framestore responded to the brief by developing Fact or Fantasy? The Fantastical Game of New Zealand.

The four-player shared mixed reality experience was designed to reconnect families and friends in a reimagining of the traditional board game. Players stand around a physical table top board game and, through the Magic Leap headsets they see various characters and action sequences appear on and

interact with the board, with each other and with the viewers themselves.

The game’s ‘fact or fantasy’ format showcases New Zealand as a holiday destination through the augmentation of a physical 3D game board with a digital host, story and competitive quiz questions. While the experience is shared, this particular technology allows for the CG content to be tailored to each viewer. This ensures that everyone has the best possible view of the digital content and that they hear commentary relevant to their individual gameplay and score.

The project perfectly demonstrates Framestore’s desire and ability to create new ways of engaging audiences by developing expertise in emerging technologies ahead of the curve.

BUSINESS: **JELLYFISH**
CLIENT: **TOTAL WINE & MORE**



Jellyfish is a digital partner to the world’s leading brands including Uber, Ebay, Disney, Spotify, Nestle, Ford, Aviva and ASOS acting either as a consultancy, agency, training or technology partner.

Jellyfish began life as a start up in Reigate in 2005 before growing to become Google’s leading global partner, employing more than 700 people across 18 offices, headquartered at The Shard in London.

As the digital revolution gathers pace, businesses which demand to be at the cutting edge of transformative technologies such as AI, machine learning and big data are turning to this UK company to help drive growth in digital ecosystems such as Google, Facebook and Amazon.

Growing at an average of 45% per annum consistently over the last five years and currently opening a new global office at a rate of 1 every 8 weeks, Jellyfish is proud to be a UK born business at the forefront of the global digital economy.

Total Wine & More is the US’s wine superstore – the country’s largest independent retailer of fine wine, spirits and beer.

Today, Total Wine & More operates more than 175 superstores across 21 states and continues to grow.

As a key piece of their growing digital marketing efforts, Jellyfish worked with Total Wine & More’s marketing team to drive more online and offline revenue via local inventory ads, “near me” keyword expansion, and strategic efforts to optimize towards in-store visits, in-store transactions and in-store revenue. Year on year, in-store visits increased 124% and total revenue increased 120%.

Using the full technology stack of Google Marketing Platform, Jellyfish fine-tuned audience targeting and media buys to achieve impressive business results for UGG. The work led to a 20% increase in ROAS (return on ad spend) and a 60% decrease in CPM (cost per thousand).



BUSINESS: **MBA**
CASE STUDY: **EMBRAER**
EXECUTIVE JETS

MBA an independent digital agency with expertise at driving results for clients, helping them transform to the demands of digital buying journeys. Guided by their 6 principles, they optimise the buying ecosystem working as partners with our clients, creating experiences that are where Digital and Direct Interconnect.

The client, Embraer is a Brazilian manufacturer of defence, commercial and executive jets. To Brazilians, working at Embraer is the same as Americans working at NASA. The executive jet division was relatively new. Its product line was made from converting some well-known commercial jets and by introducing new jets designed completely from scratch. The trouble with the latter was that they didn't physically exist and wouldn't for several years. Communication was highly tactical, created for specific occasions with little coherence.

The market was conditioned to buying American. Cessna and Gulfstream were the defaults and Embraer needed to challenge to get on the radar.

Therefore, MBA needed to build a brand that could compete in international markets against strong brand leaders while overcoming negative perceptions. The brand needed to bring the various tactical requirements under a unifying strategic umbrella. MBA also needed to build a digitally-



driven marketing eco-system that included a new global CRM platform, extensive marketing content and a new conversion-oriented website that would generate leads.

MBA's solution "For the Journey" neatly crossed the blurred boundaries of business and pleasure. It recognised that the potential buyers, from procurement to playboys and girls, were on a mission; there's a business deal to be made, there's a lifestyle to be had. Concurrently, the more literal interpretation – to get from A to B – enabled the conversation to tick off all the rational features which need to be considered, such as range-circles and maintenance contracts.

The results were impressive, Embraer overtook the competition to become the fastest growing aviation OEM and its flagship Phenom range became the best-selling jets in the world.



BUSINESS: **NEXUS STUDIOS**
CLIENT: **GOOGLE/SPOTLIGHT STORIES**



Nexus Studios and Google's commitment to pushing creative and technical boundaries have facilitated a strong partnership for close to a decade. Their award-winning and talked about collaborations span crafted advertising, animated short films, highly innovative interactive experiences and large-scale experiences at some of the world's most high profile events.

One such collaboration has been in the US with Google's Oscar nominated and Emmy award winning platform for mobile and VR storytelling 'Spotlight Stories'. In 2016 Nexus Studios collaborated with them to produce Rain or Shine, directed by Felix Massie.

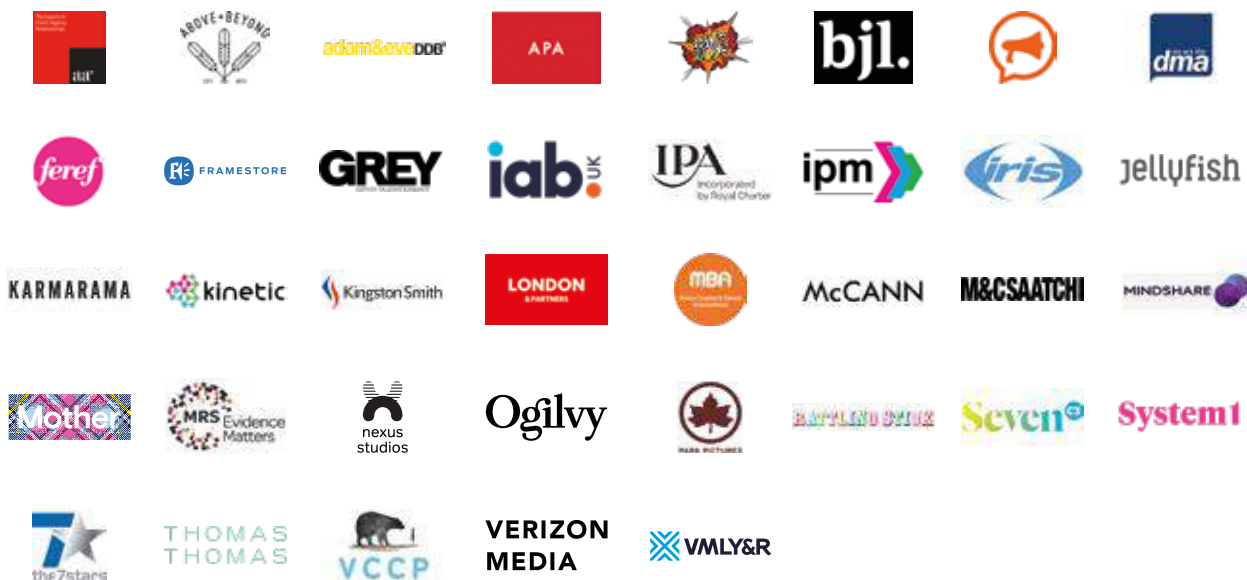
Aiming to experiment with a new form of storytelling while test-driving the ATAP software, the pioneering Rain or Shine enables the viewer to look around to find subplots and surprises. Variety magazine called Rain or Shine 'the most interactive Spotlight story yet.'

In 2018 Nexus Studios produced their second Spotlight story. Named by Forbes magazine as one of the top 15 Virtual Reality (VR) YouTube videos of 2018, 'Back to the Moon' was

co-directed by Fx Goby and Google Doodles' Hélène Leroux. Launching on the Google homepage as the first ever VR/360° enabled interactive Google Doodle, 'Back to the Moon' celebrates the life and work of French filmmaker Georges Méliès, one of the most innovative and influential filmmakers in the history of cinema. A technical and creative feat, the film is available on multiple platforms and transports the viewer inside Méliès magical world via some of his best-known films, styles, techniques and characters.

Highly acclaimed, the film hit over 200 million views in two days and was subsequently both Emmy and Annie award nominated.

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CONTACT

7th Floor North,
Artillery House,
11-19 Artillery Row,
London, SW1P 1RT

Tel: +44 (0)20 7340 1100
Email: AA@adassoc.org.uk

ADVERTISING ASSOCIATION