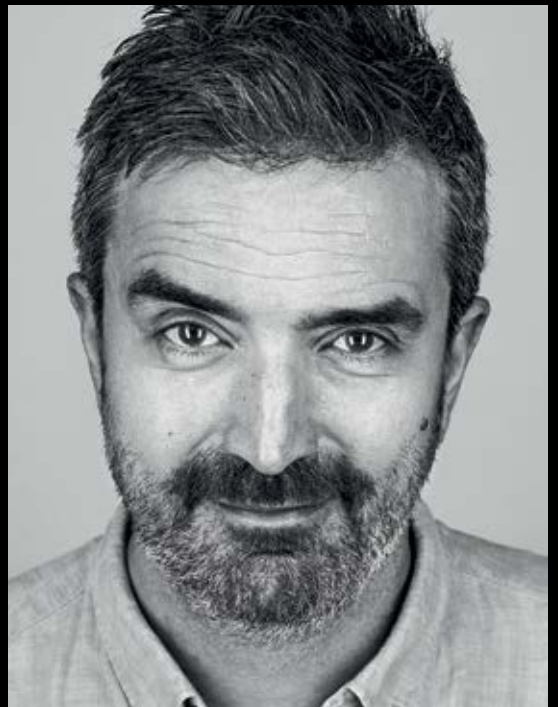


*Advertising  
Pays 6:  
World class talent,  
world class  
advertising.*



Produced by:





# I'M A GREAT ADVERT FOR BRITAIN

ASTRID  
VAN ESSEN  
Managing Director  
MediaMonks UK

Britain's advertising industry leads the world, and it attracts some of the very best talent on earth.

Creatives, technologists, media specialists and strategists from all four corners of the globe have made their careers and homes here.

Astrid is a Managing Director from the Netherlands, now living in London. She and others like her make an enormous contribution to the sector - one that earns the country at least £120bn a year.

Staying open to our foreign colleagues - to their ideas, ingenuity and commitment - enriches us all. They are a great advert for Britain.

Let's keep it that way.

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**A GREAT  
ADVERT  
FOR  
BRITAIN**

**A** ADVERTISING  
ASSOCIATION

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# *Introduction*

from Josh Graff, UK Country Manager  
& VP Marketing Solutions, EMEA at LinkedIn

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I have experienced first-hand what makes the UK such a creative powerhouse – the people. We're a wonderfully diverse and international workforce that enables brands and their agencies to create campaigns which resonate across international, cultural and socio-economic boundaries. Our industry contributes £120BN to the UK economy and supports one million jobs.

The opportunity to use LinkedIn's unique labour market insights, gleaned from our 500 million members, to provide a live snapshot of the UK's advertising sector and

showcase its international diversity was therefore of personal and professional interest.

Our data clearly shows that the UK, and London in particular, is a magnet for international advertising talent, and even more attractive, it would appear, than other key hubs such as Amsterdam, Paris and New York.

With more than half of the sector's workforce located outside of London and nearly a third of talent arriving from abroad settling beyond the M25, the whole country experiences the benefits of the advertising industry and will continue to need seamless access to skilled international talent over the coming years.

The challenge for every business is hiring and retaining the best people, and that's particularly true during

times of economic uncertainty. Given there's now irrefutable evidence that diverse teams are more successful, the companies which attract employees who truly reflect the customers they serve will ultimately be more productive, more successful and more adept at retaining their talent over time.

As the sector faces unprecedented challenges, both from within and externally, I hope that this report, informed by LinkedIn's powerful data, can not only help employers make better decisions about their talent pipelines but that it will also inform policy makers and educators on what's required to ensure the sector continues to thrive.

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# Foreword

from Secretary of State for Digital, Culture,  
Media and Sport, Rt Hon Karen Bradley MP

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We all know that it's the people you employ that make a business successful. Nowhere is that more evident than in the UK's first-class advertising industry, among the most culturally diverse of any in the world.

The UK's world-leading reputation in advertising, media and marketing communications means that we can attract the best international talent, stimulate billions of pounds worth of inward investment and export more advertising than anywhere in Europe.

This report shows that advertising is an important UK employer, not just in London but across all UK regions and

nations. It also shows that advertising can unlock the potential of British brands; including, not least through the GREAT campaign, Brand Britain.

The UK is going global and from trampolining dogs to Superhumans, advertising is symbolic of the UK's ambition and potential as a nation.

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# Advertising Pays 6:

## World class talent, world class advertising

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The UK advertising market has a major positive impact on the country's economy, with London serving as one of the great global centres of the industry. Based on analysis of data from LinkedIn, the world's largest professional network, this report focuses on the people who make UK advertising what it is today. It examines

the extent of recent migration from abroad and assesses the impact of international talent on the character and performance of the industry. It also gauges the precise whereabouts of the country's advertising workforce, and explores the role played by companies in the cities and regions outside the London powerhouse.

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*The main conclusions of the report are as follows:*

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### Advertising is a major player in the London employment market

Out of every 10,000 LinkedIn members in the London area, 556 are employed in the advertising and marketing industry, which is equivalent to one in every 18 people. This represents a higher proportion of advertising workers within the overall employment market than can be seen in the other major international hubs examined in this report – Amsterdam, New York, Paris and Sydney.

### International talent plays a pivotal role in the UK

The proportion of the current advertising and marketing workforce in London who arrived from abroad in the last 12 months is three times as high as the corresponding figure in New York, and also higher than in Paris and Amsterdam. More than a third of these recent arrivals come from European Union (EU) countries, with many others arriving from the United States and Australia. Although London attracts the majority of this international talent, more than a quarter (29%) of new arrivals<sup>1</sup> to the UK have come to work outside London. Interviewees for this report, representing a broad cross-section of companies both buying and selling advertising services, consistently emphasise the essential contribution of non-British workers to the industry. Without such diversity in the workforce, creativity and customer service would suffer dramatically.

### The UK advertising market supplies more talent to the other advertising hubs looked at in this study than any other country

The fluid international talent market can work both ways. Just as UK companies seek out overseas talent to add a further dimension to their business, a constant flow of people from the UK's advertising businesses enhances the quality of other international hubs with the experience and knowledge they acquired here.

### Most of the UK's advertising workforce is located outside London

Despite the global reputation of the capital's advertising market, most LinkedIn members who work in the industry in the UK aren't based in London. More than half (57%) work in the regions and cities outside the capital. Manchester is the largest of the city hubs in terms of the number employed in the industry. There are some signs that concentrations of digital advertising expertise may be developing in these regional centres.

# 1

*Advertising  
fuels the  
UK economy*



# Advertising fuels the UK economy

The UK's advertising industry, renowned throughout the world for its excellence and creativity, benefits the country's economy and society in a number of ways. It has a huge impact on economic performance, supports the growth of businesses, generates large-scale employment and makes a considerable contribution to UK exports.

Analysis conducted by Deloitte in 2017 found that for every £1 spent on advertising, the economy as a whole benefits by £6. Given that the annual expenditure on advertising is £20<sup>2</sup> billion, the overall contribution to the economy was estimated to be £120 billion (Figure 1), or 6.4% of total UK GDP.

Figure 1:  
How advertising  
fuels the UK  
economy

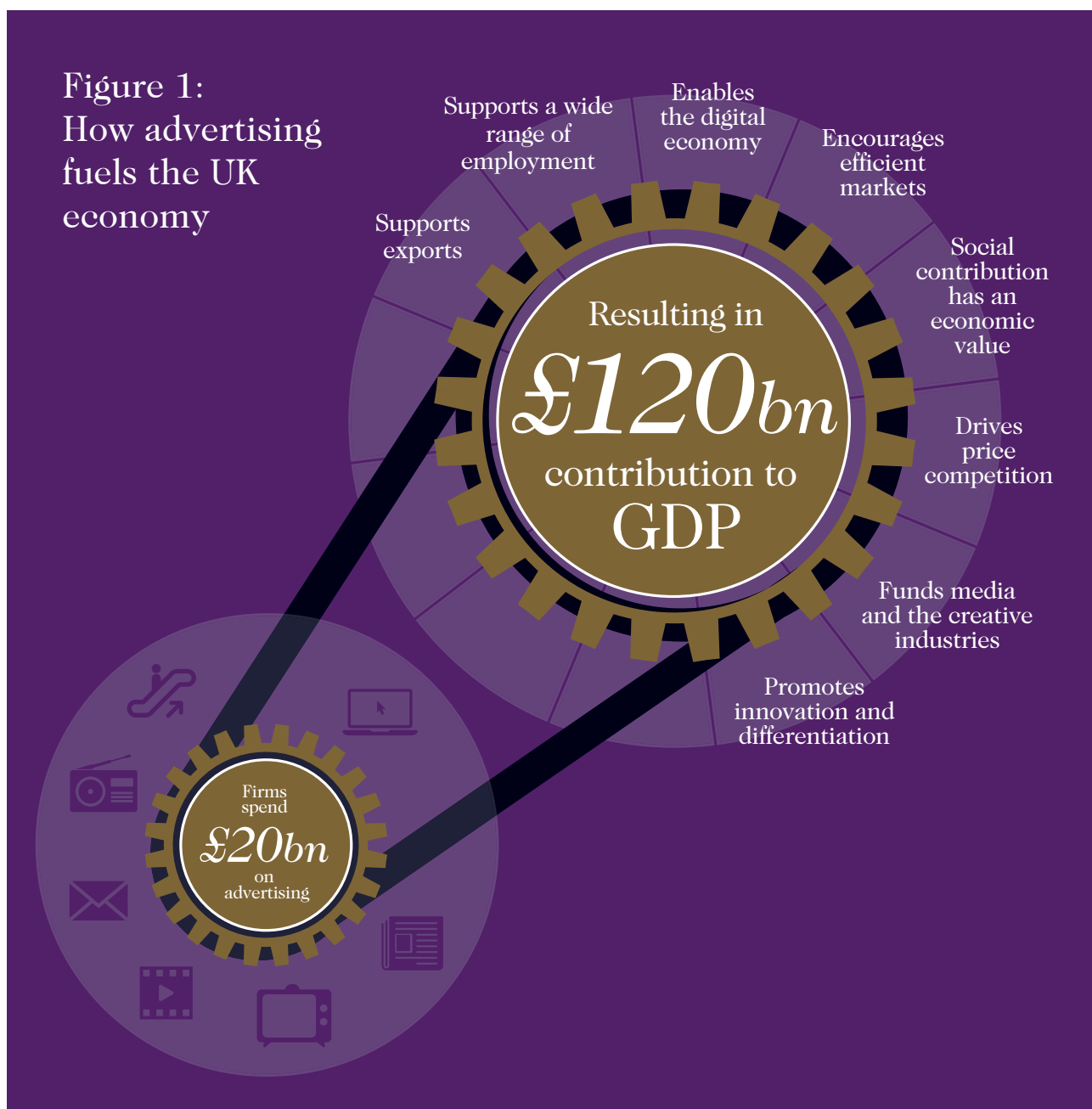




Figure 2: Annual UK exports of advertising services



According to Deloitte, almost one million jobs are supported by the advertising industry, which is equivalent to 3.2% of overall nationwide employment.<sup>3</sup> This figure is broken down as follows:

- 350,000 jobs in advertising and in the in-house (brands) production of advertising
- 76,000 jobs in the media sectors supported by revenue from advertising
- 560,000 jobs supported by the advertising industry across the wider economy

The economic importance of the advertising industry can also be demonstrated through the value of its exports. The latest available data from the Office of National

Statistics (ONS) attributed an annual export figure of some £4.3 billion to advertising services (Figure 2), or 3.5% of all exported UK services.<sup>4</sup> Advertising yields more export value than insurance or construction services, and more than twice as much as either accounting and auditing or recruitment.

<sup>3</sup>Deloitte analysis based on data from the ONS, the OECD, the DCMS and Mint UK (2017).

<sup>4</sup>ONS (2015), "International trade in services". The 2015 figure for "Advertising, market research and public opinion polling services" was stated as £5.26 billion. In previous years, "Advertising" and "Market research and public opinion polling services" had been two discrete categories. As they have now been combined, we reached the 2015 figure for advertising by taking the proportion of advertising exports in the 2012 combined total, and applying the same proportion to the 2015 combined total.



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*London – A hub for  
global advertising  
talent*

# London – A hub for global advertising talent

The strength of the UK advertising industry relies to a large extent on the constant injection of talent, energy and fresh ideas from abroad. It is London, one of the world's great centres of advertising excellence, which principally attracts people from far and wide. "In London, you get the world," says Tom Knox, Chairman of MullenLowe London. "The number one reason clients give for choosing a London agency is that this city is a magnet for global talent. In our creative department, we have Brazilians, we've got Singaporeans, we have Colombians, we've got South Africans, you name it."<sup>5</sup>

In 2017, LinkedIn, the world's largest professional network with more than 500 million members in over 200 countries and territories, partnered with the Advertising Association. Together they examined the employment market for the advertising and marketing industry in London, and compared these findings to those from other international talent hubs: Amsterdam, New York, Paris and Sydney. This is the first time that LinkedIn has partnered with an industry body in this sector to make use of its data in this way.

The results first of all reveal the significant contribution of the industry to overall employment in London, and confirm the instrumental role of international talent within this picture (see Methodology below).



## Methodology

The results of this analysis represent the world seen through the lens of LinkedIn data. As such, it is influenced by how members choose to use the site. This can vary based on professional, social, and regional culture. These variances were not accounted for in the analysis.

- For the UK-based analysis, in July 2017 LinkedIn created a pool from its 23 million UK members for analysis, which satisfied the following criteria:
  - Members who indicated that they were located in a particular region of the UK; and
  - Members who indicated that they were currently

employed at a company classified as being in the 'marketing and advertising' industry; and/or

- Members who indicated that they were employed in a current role with a job title from the occupational group 'advertising specialist'; and/or
- Members who indicated that their work title included one of the following words – 'advertising', 'brand' or 'media'.
- The total number of LinkedIn members who met the above criteria amounted to 328,000. This figure aligns closely with the employment estimates calculated by Deloitte in Section 1, which were that 350,000 people worked in advertising and in the in-

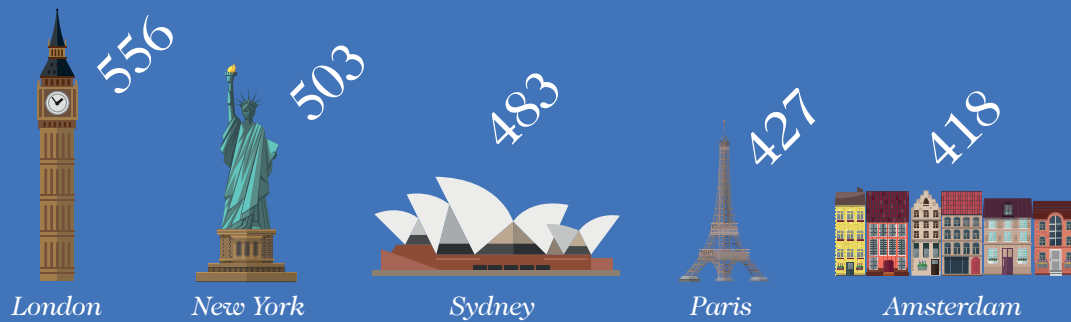
house (brand) production of advertising.

- For the comparative city analysis, LinkedIn created a similar pool of members for each of the cities: Amsterdam, London, New York, Paris and Sydney.<sup>6</sup>
- A LinkedIn member's location is indicated in their profile summary. When this location was changed between January 2016 and January 2017, that change was categorised as a migration.

<sup>5</sup>Ad Pays 4 (2016), "Advertising Pays 4: Export value and global impact".

<sup>6</sup>N.B. For Amsterdam and Paris, the Dutch and French equivalents of the keywords for the UK-based analysis were used.

Figure 3: Number of advertising and marketing workers for every 10,000 LinkedIn members



London has a higher proportion of workers in the advertising and marketing industry than the other hubs examined in this study. For every 10,000 LinkedIn members in London, 556 work in advertising and marketing (equivalent to one in 18). This is considerably greater than the number in Amsterdam, New York, Paris or Sydney (Figure 3).

More than half (53%) of all new arrivals to London's advertising and marketing workforce is from overseas, suggesting that employers need this international talent to maintain performance and grow their businesses, and to safeguard London's hard-won international standing in this industry. Indeed, the capital's importance to the global operations of major agencies is emphasised by Dame Cilla Snowball, Group Chairman and Group Chief Executive of AMV BBDO. "We run many international campaigns from London," she says. "London is a key creative hub and attractive to clients and new business prospects. Our international reach is fundamental to our commercial success."

Around 2.5% of the current advertising and marketing workforce in London has migrated from abroad during the last 12 months, which is a higher

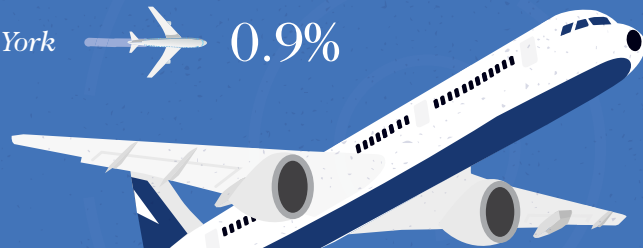
proportion than in Amsterdam or Paris, and almost three times the figure for the much more domestically focused market of New York (Figure 4).

"We run some very big international accounts out of New York," says St. John Walshe, Managing Director for the European Region at BBDO. "But the North American market is in itself so large, that there are many advertising people in New York who build great careers

without needing to know where their passport is."

On the other hand, central to the London market's appeal to potential advertisers, is a workforce comfortable with crossing national boundaries. "We have staff who move between London, Berlin, Madrid and Prague," says Adrian Coleman, Founder and Global CEO of London-based agency VCCP. "Clients want a collective view on Europe that takes in

Figure 4: Proportion of the advertising and marketing workforce that migrated from abroad between Jan 2016 and Jan 2017



local cultural nuances. Anything that pulls up the drawbridge is bad news.”<sup>7</sup>

The LinkedIn data focuses on recent migration for this report. The total proportion of international workers in the London advertising market is, of course, considerably higher. Both statistical and anecdotal evidence provided for this report confirm their sizeable contribution. For example, 21% of MediaCom’s employees in the UK are from other countries (see case study 2).

Indeed, the presence of non-British workers is now so completely normal that the prevailing industry culture takes little account of national differences. “Whatever your heritage or nationality, it will be no barrier to working at our company,” insists Elijah Lawal, PR Manager at Google UK. “The relevant questions are: Are you the best person for the job? Do you fit with the culture by being respectful, engaged and passionate? Do you believe in what Google is trying to achieve? I look around my office and I see people of African heritage, people from Australia, Singapore, Jamaica, from

everywhere. Replicate that across all our offices, and you get an incredible mix.”

The substantial proportion of EU workers among the total number of new arrivals to the London market is evident from the LinkedIn data (Figure 5). More than a third (37%) of workers in advertising and marketing who have come to London during the last 12 months have arrived from EU countries. More workers came to London from France than any other country in the EU (8% of all new arrivals). However, the largest contingents of international workers arriving from individual countries were from the United States (15%) and Australia (12%).

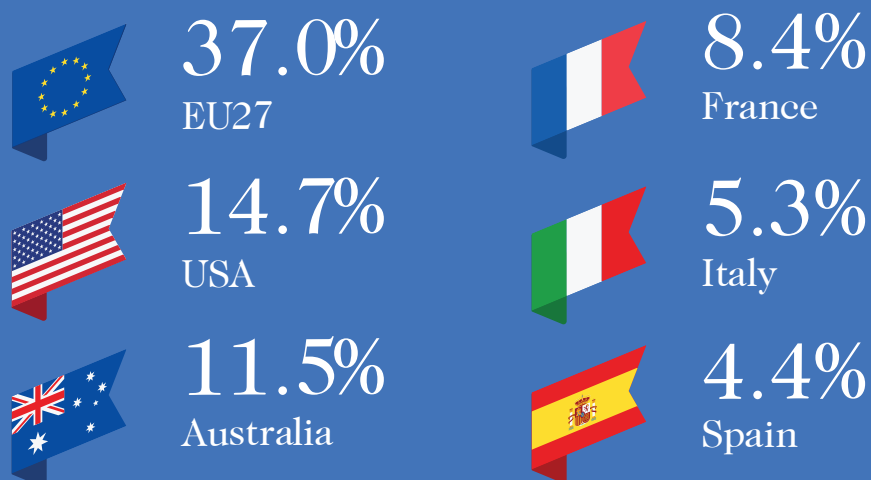
These international workers bring with them a wide range of skills. Those cited most frequently on their LinkedIn profiles are marketing, social media marketing, management and leadership, graphic design, and digital and online marketing. Perhaps the most important skills they possess, however, are linguistic ability and the cultural awareness to handle global

clients. Unsurprisingly, the most represented skill on the profiles of recent arrivals in comparison to workers from the UK is their command of more than one language.

Often, going hand in hand with a command of other languages is an intimate knowledge of one or more foreign societies. “Languages are helpful, but I wouldn’t hire somebody just because they speak multiple languages,” says St. John Walshe of BBDO. “The explicit brief from our clients is that we bring cultural diversity into our teams. They don’t want solely Anglo-Saxon faces showing up at a meeting telling them how to run their campaigns in France, Germany, India and Brazil” (see case study 1).

Advertising executives repeatedly point to the creative potential of having a varied mix of backgrounds and cultures, which in turn lead to commercial success. In September 2017, Publicis London recruited three senior creatives, one from Romania and two from Brazil. “They’re massively talented, but

Figure 5: International talent moving to London’s advertising and marketing industry by country of origin



<sup>7</sup>Advertising Age, 23 August 2017, “London Calling For Brexit Fix: Ad Trade Fights Back”.

for me it's all about building the most unconventional and eclectic crew of people with different cultural reference points and life experience," said Dave Monk, the Publicis Creative Director, in the wake of the appointments. "I love the alchemy of that."<sup>8</sup>

"Our industry was for too long dominated by white, male, middle-class British people," agrees Liz Jones, CEO of Dentsu Aegis UK's B2B operations. "They would sit in a room, come to a unanimous solution quickly and then be extremely satisfied with themselves. But we have a diverse and global customer base with various experiences and motivations. You will not create a connection with that audience unless you have a similar level of diversity to do the thinking. The end product will take more time to develop, but it will have far more business value." Jones estimates that 15–20% of

the company's 4,500-strong workforce in the UK and Ireland are non-British.

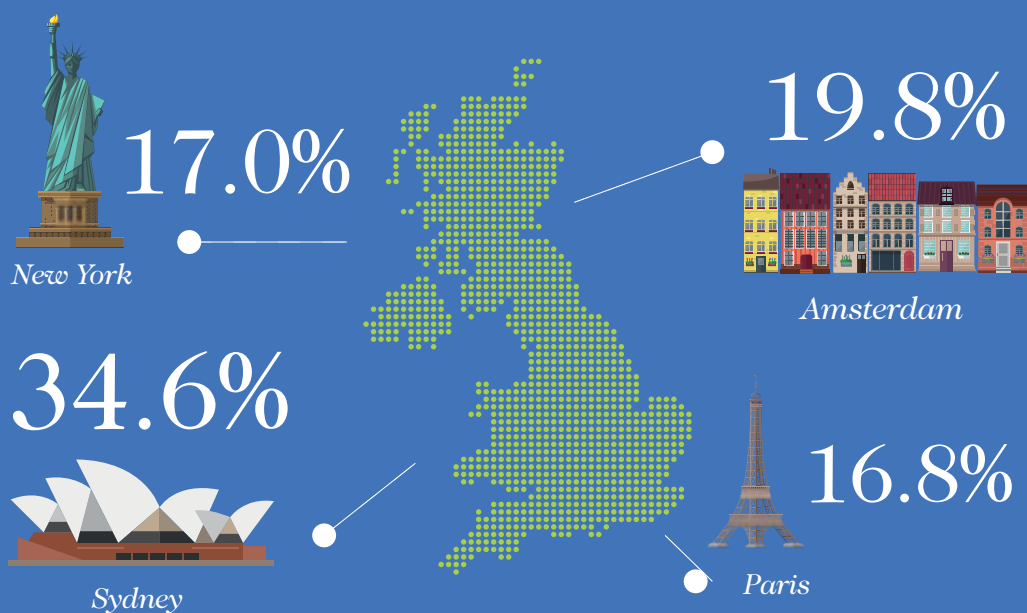
Google's commitment to diversity as a vital component of business success has persuaded it to build a new and larger London office. "At Google, we've always found that a mix of people from different backgrounds, cultures and nationalities leads to more creative and diverse output," says Ronan Harris, Vice President and Managing Director of UK and Ireland at Google. "As a global company, it's vital for us to have access to the best people from around the world and there are few places as attractive as London for global talent. It's the reason we love being here and the primary driver of our recent commitment to a new London HQ with the capacity for up to 7,000 employees."

It's not only London agencies that acknowledge the

commercial imperative of diversity in their industry. "Advertising relies on creative ideas, and you need different cultural backgrounds and divergent thinking to come up with something new," says Brian Coane, a Partner at The Leith Agency in Edinburgh. The company's workforce now boasts several nationalities, which is the result of a deliberate policy to cast its recruitment net as wide as possible.

Looking at the international cities in the study, it appears that the movement of talent is not just a one-way process. The UK market has provided more workers to the advertising and marketing industry in the other hubs in this study than any other country (Figure 6). More than a third of recent arrivals to Sydney are from UK based companies (35% of arrivals), who also provide 20% of recent arrivals to Amsterdam, and 17% to both New York and Paris.

Figure 6: New arrivals from the UK to the advertising and marketing industry in Amsterdam, New York, Paris and Sydney (Jan 2016 to Jan 2017)





As well as his role as Managing Director for Europe at BBDO, St. John Walshe also leads the Mars account – the company’s largest multinational client. A large share of this account is run from London, and Walshe has no doubt why this is. The worldwide strength of the London advertising market, he firmly believes, lies in its multinational workforce and its associated outward-looking ethos.



“When you put people in a room from different nationalities and get them to talk about art, relationships, love and food, they are going to have very different perspectives,” he says. “Humour is also very specific to a certain country. This melting pot of insights and personalities gives us a much richer story to tell a client about how to launch a single campaign in many different countries.”

To demonstrate his point, he cites the example of Carmen Vasile, a Romanian who leads the company’s global Mars Petcare account and is based in London. “Carmen comes from a post-Communist country. Her viewpoint is invaluable when we talk to clients about how to establish new markets in places where people haven’t grown up with an intimate knowledge of an array of brands. She has seen how they can start to become first-world economies.”

Vasile speaks effusively about London and, in doing so, reflects the views of the many advertising workers interviewed for this report who have come from abroad to ply

their trade here. “I admire amazing places like Tokyo, Sydney, San Francisco and New York,” she says. “But, in my opinion, there is no place quite like London. I love its ability to blend cultures and how it exudes a unique creative energy that you always feel here.”

It follows from the logic of these arguments, however, that any diminution of the London market’s international flavour will be damaging to its position as a global centre. “Our people are naturally mobile anyway; they are on planes all the time,” Walshe explains. “If they are faced with a choice between a city like Paris or Munich that welcomes you, and one that doesn’t, then I would be left with no choice but to place them in the place where they want to settle.”



# Overseas talent

Benni Lickfett

Head of Technology and Innovation

Diageo

German/Swedish

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What are the main differences between working in London and other leading advertising hubs around the world?

Firstly, London is more cosmopolitan altogether. In terms of markets, it services Africa, the Middle East and all other European markets. The quality of talent in London is exceptionally high, particularly in the creative industries.

How good is the advertising industry in London?

In advertising in London you have an incredible talent pool. You really have the best of the best here in London, who build careers here and stay here.

Are Tech teams in London particularly diverse?

Lots of what we do is looking at trends, how you apply different technologies and innovations. For that, diversity of perspectives is really important.

How can London ensure that it retains its position as a world leader in advertising?

Uncertainty for business is not good, we need to be able to think long term. Particularly in the creative industries it's all about talent and being able to attract the best. So any assurances or transparency on how that will be possible in the future would be very beneficial.

If the UK is unable to attract the diversity of international people that it currently does, UK advertising will...

...lose its global leadership role and really have to reinvent itself.

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*"Even before coming I knew London was the home of advertising."*

Rebecca Zhang  
Engine, Australian

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*"For our industry it's crucial that we have international talent, that's what makes London the best city in the world when it comes to advertising."*

Nadia Khaldi  
Generation Media, Swedish

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*"The fact I speak Greek and French by default is perfect because I'm working with Cypriot clients, with French clients, with Belgian clients."*

Rania Kouros  
adam&eveDDB, Cypriot

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*"If London loses its attraction to overseas talent it will stop leading, it will just follow the U.S., all the talent will go there."*

Sherif Guindy  
Maxus Global, Egyptian

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*"Every single company under the sun is here, the best agencies in the world are here. In our industry London is top of the list of destinations that you'd ever want to work in."*

Ciara Keenan  
Diageo, Irish

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*"The core service that we sell is providing native insight to adapt a whole variety of campaigns across several markets. So having cultural diversity in the workplace is probably the most important thing."*

Saad Finge  
Hogarth, French

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*"When I worked in the United States, people used to ask me where I was from. It doesn't happen here. We are all Londoners. Even though I am Italian, I feel like a Londoner."*

Adriano Accardo  
Google, Italian

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*"London is a place where dreamers from around the world come together, they work hard, they're open, they're kind, they're creative together. If we lose that, London will just become another market."*

Devora Mateeva  
Publicis, Bulgarian

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# Overseas talent

Jane Adylina

Senior Brand Manager, International

Tesco  
Russian

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What attracted you to the UK in the first place?

I was drawn in by London primarily. It is of course recognised across the world as a truly international city. I knew there would be plenty of opportunities to make my mark in a leading international organisation.

How does the UK differ from other countries you've worked in?

Diversity. The UK is host to such a broad range of global cultures it becomes a wonderfully interesting place to work.

What's your favourite thing about living and working in the UK?

Feeling at the heart of international affairs. My current role covers countries across Europe and South East Asia, but it feels entirely normal to be based in the UK – it's such a centre for international business.

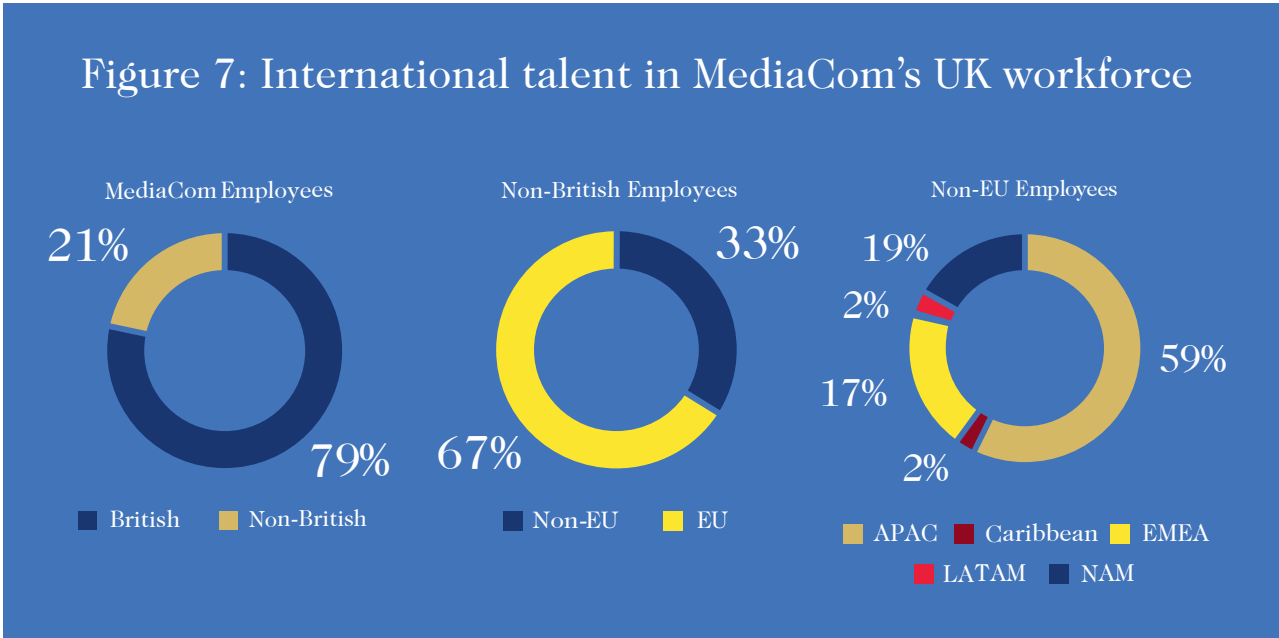
How can the UK ensure that it retains its status as a world leader in advertising?

The UK is attractive because it's recognised as an international centre of excellence. To keep that status it needs to keep attracting the right people, and for them to deliver their best work as a showcase for the country.

If the UK is unable to attract the diversity of international people that it currently does, UK advertising will...

...be fishing from a smaller pool of talent – becoming less innovative and weaker for it.

Figure 7: International talent in MediaCom’s UK workforce



Workforce statistics provided by the international global media agency MediaCom reveal the extent of non-British participation in the UK advertising and marketing industry.

One in five employees in the UK is from overseas. Two-thirds of these workers are from EU countries (see Figure 7), with more than half of the remainder from the Asia Pacific region.

International mobility is built into the fabric of MediaCom’s human resources talent strategy. At least 10% of its international employees, at all levels of the company, are on a global assignment at any one time.

Its operations in London, Paris, Dusseldorf, Dublin, Amsterdam, Madrid, Dubai and Johannesburg all participate in this programme.

“Within just one of our London-based worldwide teams, we have talent from 25 nationalities who speak 31 languages,” says Claudine Collins, UK Managing Director at MediaCom. “It is critical that UK immigration law continues to enable talent diversity, which supports us as a global company to provide the best possible services to our clients and consumers in all corners of the world.”

This view is borne out by the employees who work there. “We have been servicing one particular client in 18 different markets,” says Sami Norovuori,

an Search Engine Optimization (SEO) manager at MediaCom.

“We can do that because we have the necessary language skills in London. In Finland, where I come from, you couldn’t so easily find a Spanish speaker who also knows about SEO.”

“My department has 15 people and everyone is from outside the UK,” says Camilla Cekarini, originally from Italy, who works in the analytics department at MediaCom. “It is difficult to find people with a technical, logical mindset and a background in statistics and economics. If the UK didn’t have access to people from outside the country, our industry would certainly suffer.”



Samsung, 2017

Approximately one quarter of the workforce at Technicolor's advertising brands in the UK (MPC, Mill and Technicolor) are non-British nationals.

"The talent within our industry is global and very mobile," says Mark Benson, CEO of MPC who also sits on the Management Committee of its parent company, Technicolor.

"There is constant movement, with much of the best talent naturally wanting to work on the best projects."

According to Benson, MPC's international talent works across all of the varied facets of its business, from creative work to production and technology expertise, software and the mathematics and science skills that underpin so much of its creative work.

The diverse workforce, he believes, "feeds a culture of innovation and an ongoing commitment to do things better." It also gives the company and the wider visual effects industry in London a natural inclination to look further afield, both for inspiration and for new clients.

"Our colleagues from abroad have made us far less insular, and we actively look to work with people from all over the world," he says.

To protect that culture, Benson feels strongly that the landscape in which UK companies operate should remain unaltered. "The UK must continue to be attractive to filmmakers in terms of tax relief, and there should be no restrictions placed on people's ability to work in this country," he says. "If these conditions change, our industry could face a considerable challenge."



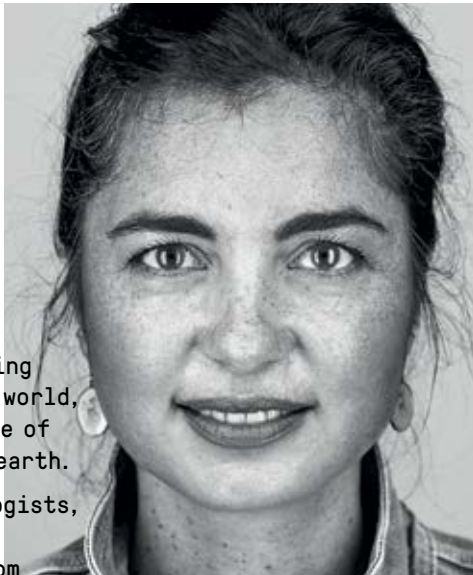
> Britain's advertising industry leads the world, and it attracts some of the best talent on earth.

Creatives, technologists, media specialists and strategists from all four corners of the globe have made their careers and homes here.

The skills they bring help us export our services far and wide, and make an enormous contribution to the sector - one that earns the country at least £120 billion a year.

Staying open to our foreign colleagues - to their ideas, ingenuity and commitment - enriches us all. They are a great advert for Britain.

Let's keep it that way.



WE'RE A

GREAT

ADVERT



FOR

BRITAIN

A GREAT  
ADVERT  
FOR  
BRITAIN

3

*London is just the start – Advertising is a major employer across the UK*





# *London is just the start – Advertising is a major employer across the UK*



**London may be a world-famous advertising market, but the majority of the UK advertising workforce is not actually based there. Taken together, the nations, regions and cities outside London employ more people.**

The pool of members identified for this study as working in advertising and marketing in the UK amounted to 328,000, as defined in Section 2 – methodology.<sup>9</sup> Of these, less than half (43%) are in London, meaning that 57% of the industry's workers are located somewhere outside the capital.

Although London still holds a particular appeal for international workers, more than a quarter (29%) of recent arrivals to the advertising and marketing industry in the UK has found work outside the capital.

Although the non-London workforce is very substantial

as a whole, no individual hub is yet in a position to rival the capital, with the industry very much spread throughout the country. The region with the most advertising and marketing workers outside London is the South East of England, while Manchester is the largest city hub outside London (Figure 8).

Some of these regions and hubs have the potential to secure a specialist identity, becoming a hub for certain skills or a particular industry expertise. The study suggests that areas outside London contain a disproportionately high number of social media specialists, software developers, website managers, and online marketing managers.

Certainly, if companies in these cities can attract the necessary talent, modern communications and the rise of digital advertising should make physical location less relevant and reduce the reliance on London. "The whole realm of digital advertising has really grown here since the

recession," says Brian Coane at The Leith Agency, based in Edinburgh. "Website design and digital services are probably the strongest areas here now."

Local companies will naturally favour agencies close by, thereby continuing to provide the bread and butter for the regional advertising market. The same is true of the various local operations of a major national company such as Lloyds Banking Group, which uses agencies in Bristol, Cheltenham, Edinburgh, High Wycombe and Leeds.

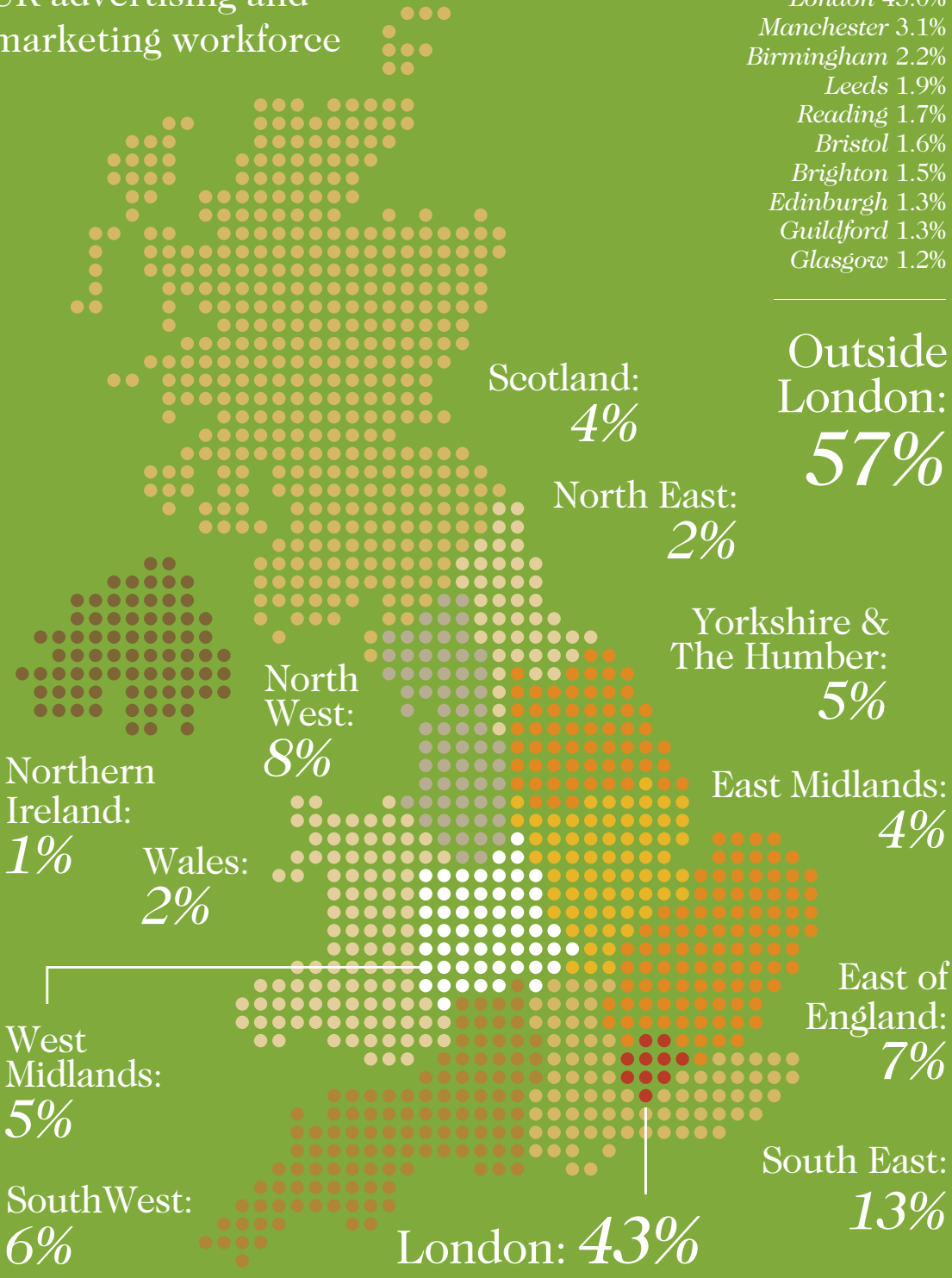
Coane holds out the hope that the government will do more to spur investment in advertising from smaller companies throughout the UK, with a resulting stimulus for regional advertising centres and the SME (small- and medium-sized enterprise) sector. "SMEs tend to advertise less than they could," he says. "If they were encouraged to spend more, that would benefit agencies outside London. Clients are more likely to use someone on their doorstep."

<sup>9</sup> This figure is very similar to Deloitte's estimate of 350,000 who work in jobs in advertising and in the in-house (brands) production of advertising.

Figure 8: Regional and city breakdown of the UK advertising and marketing workforce

Top ten city hubs for employment in advertising and marketing

- London 43.0%
- Manchester 3.1%
- Birmingham 2.2%
- Leeds 1.9%
- Reading 1.7%
- Bristol 1.6%
- Brighton 1.5%
- Edinburgh 1.3%
- Guildford 1.3%
- Glasgow 1.2%





## How a Bristol company benefits from overseas talent



Alzheimer's UK (ARUK), 2016

Aardman, an animation studio based in Bristol, has a broad range of clients. They mostly comprise large advertising agencies in London, but the company also works directly for some large brands and charities based in their region, such as Bristol Ageing Better.



Nestle, 2017

The LinkedIn study reveals that the majority of those migrating to work in the advertising industry in the UK gravitate to London. But the impact of these new arrivals is still substantial outside the capital, and Aardman is one company that relies heavily on overseas talent.

“The only way we can ensure diversity in our content is to have people from diverse backgrounds,” says Heather Wright, Executive Producer and Head of Partner Content at Aardman. “What’s more, the UK simply doesn’t produce sufficient people with the skills, particularly in storyboarding and concept art, which are so important to us. If we couldn’t hire people from abroad, it would definitely have a detrimental effect on our business.”

Some of these workers are permanent staff; others arrive as freelancers for a limited period to assist with a particular project. Many come from France, Germany and Denmark – where the animation schools have an especially strong reputation. If such talent was restricted, wage inflation may ensue. “We would have to look to recruit from the United States, where animation talent is more expensive,” explains Wright. “They have a higher audience for television and feature films there, so they can afford to pay more.”

Moreover, Wright believes that companies without studios around the world, like Aardman, would bear the brunt of any such restriction. “Global companies can use resources elsewhere in the world, if necessary,” she says. “We don’t have that luxury, so without easy access to European talent, independent companies like us would find it more difficult. UK creativity and business would be damaged as a result.”



*The power of advertising for an SME*



Previous research has found that advertising has a disproportionately positive impact on SMEs, with the relevant return on investment estimated at eight times more than at their larger counterparts.<sup>10</sup> Advertising expertise in regions throughout the UK is therefore essential in accelerating the growth of such companies.

One Scottish SME that has benefited from advertising is Stoats, founded in 2005 by Tony Stone and Bob Arnott as the world's first mobile porridge bar. The company now sells a variety of porridge products, including both fresh porridge and snack bars that use the same natural ingredients. As a result of its expansion, the company opened a new factory in 2017, recruiting a further 15 people.

It attributes much of its growth to the clever use of

an inevitably limited budget in building a powerful brand. The romantic story of the company's development, from the founders' original starry-eyed idea to sophisticated business, has been a central element of the advertising content. Social media has proven particularly effective as a medium. Working with Edinburgh-based agency Story UK, the marketing for Stoats' partnership with World Porridge Day was viewed online five million times in just one day.

That is not to say that traditional advertising in specific regions has been neglected. One outdoor campaign in Bournemouth increased sales by 18%. With 10% of sales now coming from exports, Stoats is on track to reach a turnover of £10 million by 2020 - its carefully considered advertising has been essential in driving this growth.



<sup>10</sup>Advertising Association/Deloitte (2014), "Advertising Pays 2: How Advertising Can Unlock UK Growth Potential"



Steve McGauley, Founder and Creative Director of Liquid in Liverpool, believes there has been a sea change in attitudes to the UK advertising market since he founded the company in 2000. “When we get asked at a pitch where we’re from, being from Liverpool is just not an issue anymore,” he says. “Clients, both here and abroad, used to see London as the hotbed of creativity. Now that perception has switched to the whole of the UK.”

According to McGauley, there are two reasons for this shift. The first is that the best people are no longer so concentrated in the capital. “We got started in London, and when we moved the agency to Liverpool, finding the right talent was something of a struggle,” he says. “But now

we have recruited people from London, from large agencies around Europe, from the North East, from the Midlands. Liverpool is now one of a list of vibrant cities that many people would consider moving to.”

The second reason is that communication and travel are so much more convenient. “I can leave in the morning for a meeting in London, and be back home by 5.30,” he says. “What’s more, agencies like us tend to overcompensate and visit London clients even more often than agencies on their doorstep do.”

Liquid provides integrated services across design, marketing, digital, PR and social media. Its clients include major brands such as Levi’s, Warburtons and Asics, including their international operations, but also a host of more locally based companies. One recently acquired local client is the Southport Flower Show, with Liquid conceiving a comprehensive rebranding for the 2017 show.

While McGauley believes that Liquid’s location in Liverpool does not deter potential clients in London and internationally, he nevertheless maintains that local clients, large or small, prefer to deal with an agency close to home. “The Clothes Show recently relocated from Birmingham to Liverpool,” he says. “They benefit from our big brand experience but also from our local knowledge – understanding what can and can’t be done, who to talk to and who the big influencers are in the area.”





Gtech, 2017

Members of Jason Spencer's team at ITV Commercial are all based outside London. The 94-strong unit – based in nine locations, from the Channel Islands to Belfast – sells the power of television advertising to companies up and down the country, explaining how it can grow their business and brand.

The unit now deals with more than a thousand advertisers outside of London. According to Spencer, up to a third of these companies has invested in television advertising for the first time, or has resumed their investment after an absence of at least two years. "If they think the process is too complicated, we try to simplify it," says Spencer. "We look at what their budgets are and then we surprise them with what's possible." More than half of the advertisers his unit looks after are small companies spending less than £50,000 annually on TV advertising.

There have been some spectacular success stories, too. Gtech is an independent British company that manufactures cordless floorcare and garden appliances. Launched in 2001, its revenue is now in excess of £100

million. Cost-effective, regionally-focused TV advertising has been central to Gtech's media strategy, and a major contributor to its success. The increase in its TV advertising investment has been exponential, from £50,000 in 2012 to £20 million in 2016.

Spencer believes that ITV's strong reputation and presence throughout the regions of the UK make his job easier. "We produce a huge number of programmes outside London," he says. "Coronation Street, Jeremy Kyle and Judge Rinder are obvious examples. Local newsrooms are located in the same places as the people in my unit. Around half of all ITV's staff across all our divisions is based outside London. ITV has regionality in its DNA."

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# *Open to the world*

James Murphy, Chairman of the Advertising Association  
and CEO of adam&eveDDB

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## **The UK is a true centre of world advertising.**

We are the world's hub geographically: in Europe and between the Americas and Asia, and able to serve the most markets, the most efficiently. This gives us some advantages, but more importantly, we are the best in the business globally, whether you look at creativity, research, production, media strategy and planning, advertising technology or any number of other parts of the sector. And we deliver the most effective advertising and marketing services in the world because we have the best people.

As this report makes so clear, our industry is a major centre for international talent. This has a cyclical effect – having brilliant people from overseas attracts clients from those countries to work with us in this country, often on large, global assignments. Global brands want to work with the best talent and the UK has it. As the LinkedIn data shows us, this talent isn't just in London, but all round the country. Working with our home-grown people, people from every country in the world are adding value every day to our sector and the country as a whole.

The UK ad industry is a world leader because we're open to the world. It will be catastrophic to the long-term success of the sector if we can't access the right talent quickly and easily. As our new campaign says, overseas workers in our sector are 'A Great Advert for Britain'.

As an industry that delivers £120 billion of GDP per year for the country, anything that knocks advertising will dent the economy

At this time of deep uncertainty, it is critical that the government protects and promotes this world-leading British industry. The most important thing they can do to achieve this is to maintain the flow of talent.

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# *What happens next?*

Stephen Woodford,  
CEO of the Advertising Association

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This new report has been informed by LinkedIn's powerful dataset and we are very grateful for their work with us. It is the first overview of a whole industry that they have produced and it draws on a huge sample of 328,000 of their UK members working in advertising and marketing services.

The extent to which the UK advertising and marketing sector relies on talent from overseas supports our belief that immigration is the most important area for government support. This is essential in maintaining the UK's position as the world's leading global hub and drive growth domestically. Our new advertising campaign, 'A Great Advert for Britain', brings this important issue to life.

The majority of people in our industry are still British and there is a lot of work happening across all parts of our sector on skills and training to ensure that our home-grown people are world class. But an important, and perhaps easily overlooked, benefit of having some of the best people from around the world come to the UK is that they raise the bar for everyone else here too.

It is clear that international talent has a crucial, ongoing role to play in our future success.

As well as making the case for maintaining access to international talent, we are working closely with the relevant government departments on measures to safeguard and promote UK advertising internationally, as well as stimulate further growth in the regions and nations of the UK among SMEs. We will continue to make the case to government for funding and support in these areas.





Advertising's  
Think Tank



**FRONT  
FOOT**



Report written by business writer David Bolchover. David has written three high-profile business books, and has published numerous articles on management and the workplace. As well as his own bylined work, he also writes for a number of leading companies. [www.davidbolchover.com](http://www.davidbolchover.com)

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The Advertising Association would like to thank the following for their support in producing this campaign:

James Murphy, Chairman, Advertising Association

adam&eveDDB

Credos Advisory Board

LinkedIn

Our member organisations

Front Foot members

The global advertising talent who told us their stories

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## The Advertising Association

Promoting the role, rights and responsibilities of advertising.

The Advertising Association promotes the role, rights and responsibilities of advertising and its impact on individuals, the economy, and society. We are the only organisation that brings together agencies, brands and media to combine strengths and seek consensus on the issues that affect them. Through wide-reaching engagement and evidence-based debate we aim to build trust and maximise the value of advertising for all concerned.

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# I'M A GREAT ADVERT FOR BRITAIN

JORDI  
BARES  
Creative Director  
Framestore

Britain's advertising industry leads the world, and it attracts some of the very best talent on earth.

Creatives, technologists, media specialists and strategists from all four corners of the globe have made their careers and homes here.

Jordi is a Creative Director from Spain, now living in London. He and others like him make an enormous contribution to the sector - one that earns the country at least £120bn a year.

Staying open to our foreign colleagues - to their ideas, ingenuity and commitment - enriches us all. They are a great advert for Britain.

Let's keep it that way.

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A GREAT  
ADVERT  
FOR  
BRITAIN





Produced by:

