



2021 ANA DIGITAL & SOCIAL MEDIA CONFERENCE



BOB LIODICE
ANA CEO



The **world** will
never be the same
again...



It will be...

BETTER!



Coca-Cola

The New Reality

A guide to marketing in a post-COVID-19 world

ANA

A person is shown from the side, wearing a striped shirt, using a laptop. Their left hand is on the keyboard, and their right hand is holding a smartphone. The background is a blurred office setting. Overlaid on the image is a semi-transparent digital interface with various icons, including a group of people, a mail envelope, a bar chart, and a circular gauge showing 80%. The text "New Consumer Habits and Expectations" is prominently displayed in the center in a large, white, bold font.

New Consumer Habits and Expectations



Focus on the consumer first.
Be sincere and transparent.
Align your brand message
with the current context of
today's environment.

Build trust and go
beyond the product and
include messaging focused
on the community, family,
and CSR efforts.

Kirk McDonald
CEO





**NEW
HABIT**

**Consumers
embrace
a new kind of
Experiential
Marketing**



**NEW
HABIT**

**Consumers
widely adopt
previously
ignored
innovations**



**NEW
HABIT**

**Consumers
forge
relationships
with virtual
influencers**



**NEW
HABIT**

**Consumers further
move toward
online shopping**



**NEW
HABIT**

**Consumers place
even greater
importance on
Brand Purpose**

“It’s in our brand purpose to be conveyors of conviviality, where the world will be a better place if we build bridges and unleash the power of human connections.”



Pernod Ricard

ANN MUKHERJEE

Chair and CEO



TD Bank



Marketing's New Work Processes

“Often we think as classic marketers there is only one way to do things.

Now, out of necessity, we are discovering there are new ways to **get the job done.”**



RAND HARBERT
CMO



“The success of our business will depend our ability to anticipate and solve for consumers’ rapidly changing needs and behaviors.

Leverage the power of your whole business to identify trends, challenge processes, build best practices, and pilot with pace.”

JODI HARRIS

Global VP



ANA MISSION

**DRIVING
GROWTH**

FOR YOU, THE INDIVIDUAL
FOR YOUR BRANDS AND BUSINESSES
FOR OUR INDUSTRY
FOR HUMANITY

ANA GROWTH AGENDA



MARKETERS' RESPONSIBILITY

“We make marketing decisions....

We are counted on to steer the ships of our brands.”



Doug Zarkin
Chief Marketing Officer

LUXOTICA[®]

Brand Value

The
FINANCIAL
VALUE of
BRANDS
Imperative

Why Brands Must be Valued in Financial Terms

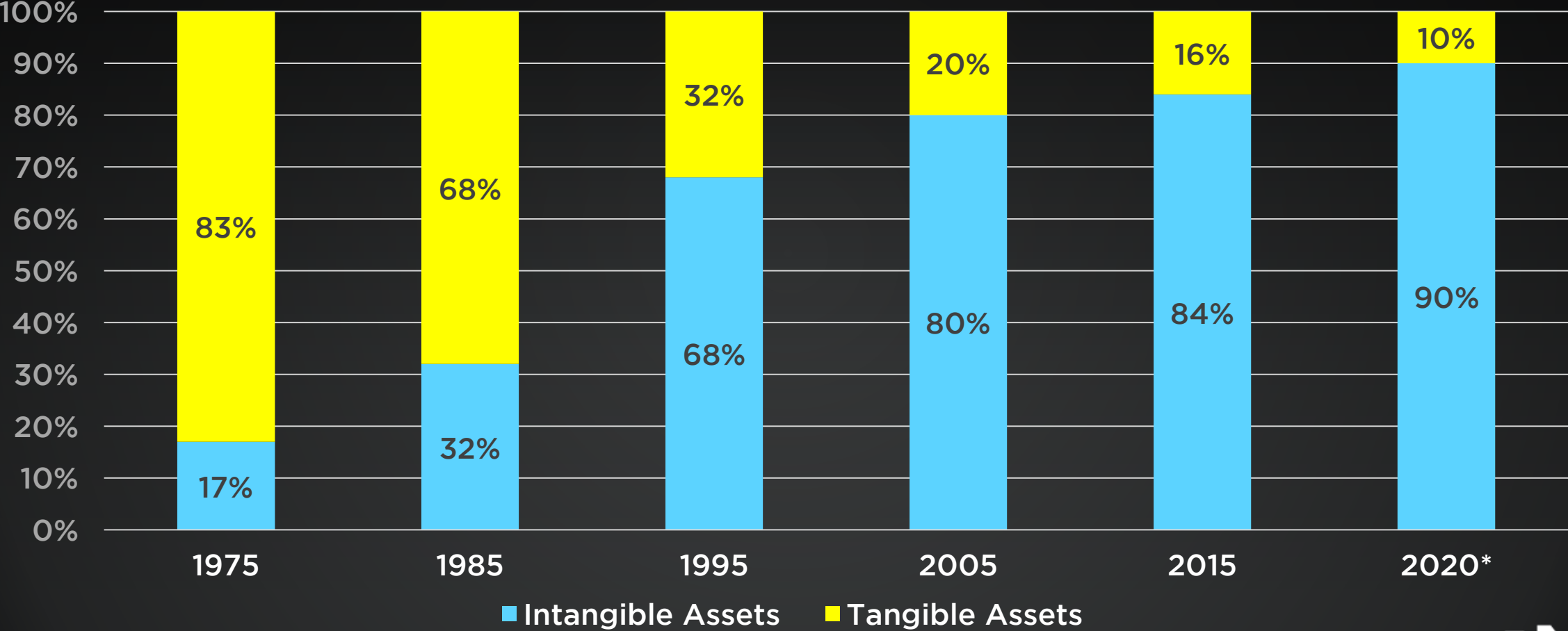
JUNE 2021

MASB

Marketing Accountability Standards Board

ANA

Components of S&P 500 Market Value



Source: Ocean Tomo. Intangible Asset Market Value Study; *2020 Interim Study Update, Jul. 2020.



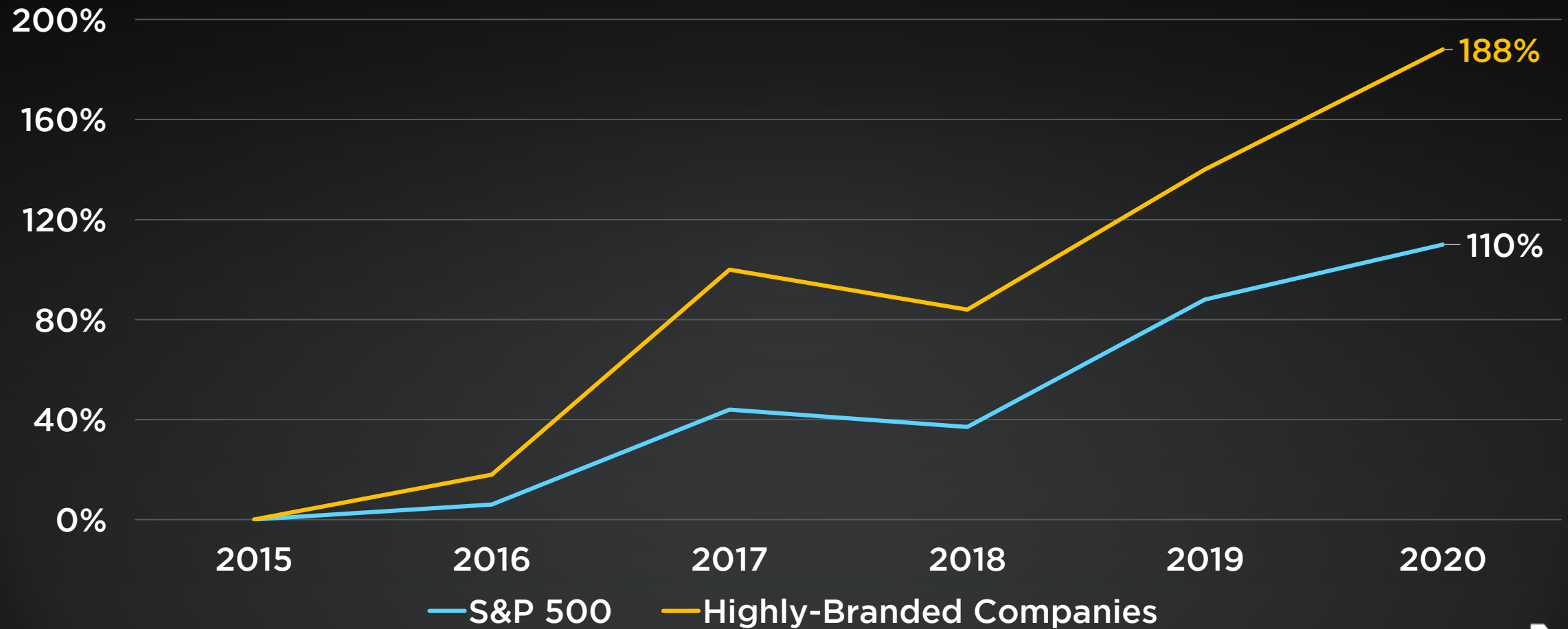
Constellation Annual Increases in Beer Segment Marketing and Operating Income

Dollars in Millions	Marketing Spending Increase	Operating Income Increase
Fiscal 2017 vs. 2016	\$59	\$270
Fiscal 2018 vs. 2017	\$46	\$308
Fiscal 2019 vs. 2018	\$64	\$203
Fiscal 2020 vs. 2019	\$76	\$205

Source: Constellation's Form 10-Ks



Most Highly-Branded Companies vs. S&P 500 Index



Source: Brand Finance

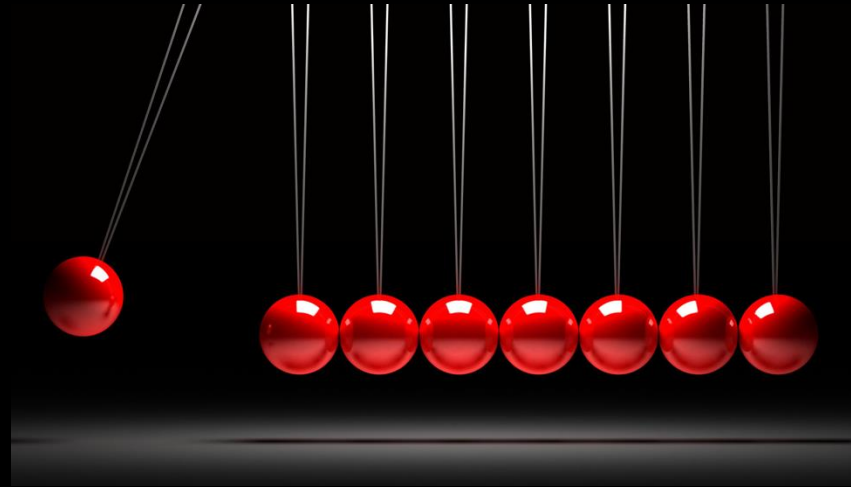


Media

We Are Living Newton's 3rd Law of Motion: "For every action there is an equal and opposite reaction."

Big Opportunities

- Programmatic
- 1st-Party Data
- CMM
- CTV
- Brand Purpose
- DEI
- Influencer Marketing
- Data
- Targetability
- Social Commerce



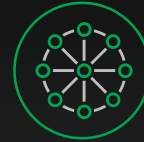
Big Challenges

- Transparency
- Cookie Deprecation
- Standardization
- IVT
- Brand Safety
- Supply Chain
- Measurement
- Privacy
- Viewability
- Walled Gardens
- Apple IDFA

MEDIA GOALS



Brand-safe environments



A transparent ecosystem where we can clearly understand true value in the ecosystem (agencies & media owners alike)



Ecosystems and relationships with customers that follow all privacy laws



A clear path to understanding the transition to the evolving digital ecosystem



Maximize our investments across channels — more difficult in the world of walled gardens



Reform in the largest video marketplace in the world

The Media Leadership Growth Council

- Creating an army of Chief Media Officers
- Mirrors the CMO Growth Council
- Set the advertiser media agenda
- Address the most pressing and important industry issues and opportunities
- Unlock initiative, innovation, and learning to drive brand and business growth



Privacy and Addressability

Google “cookie”
deprecation

Apple IDFA
policies

**PARTNERSHIP
FOR
RESPONSIBLE
ADDRESSABLE
MEDIA**

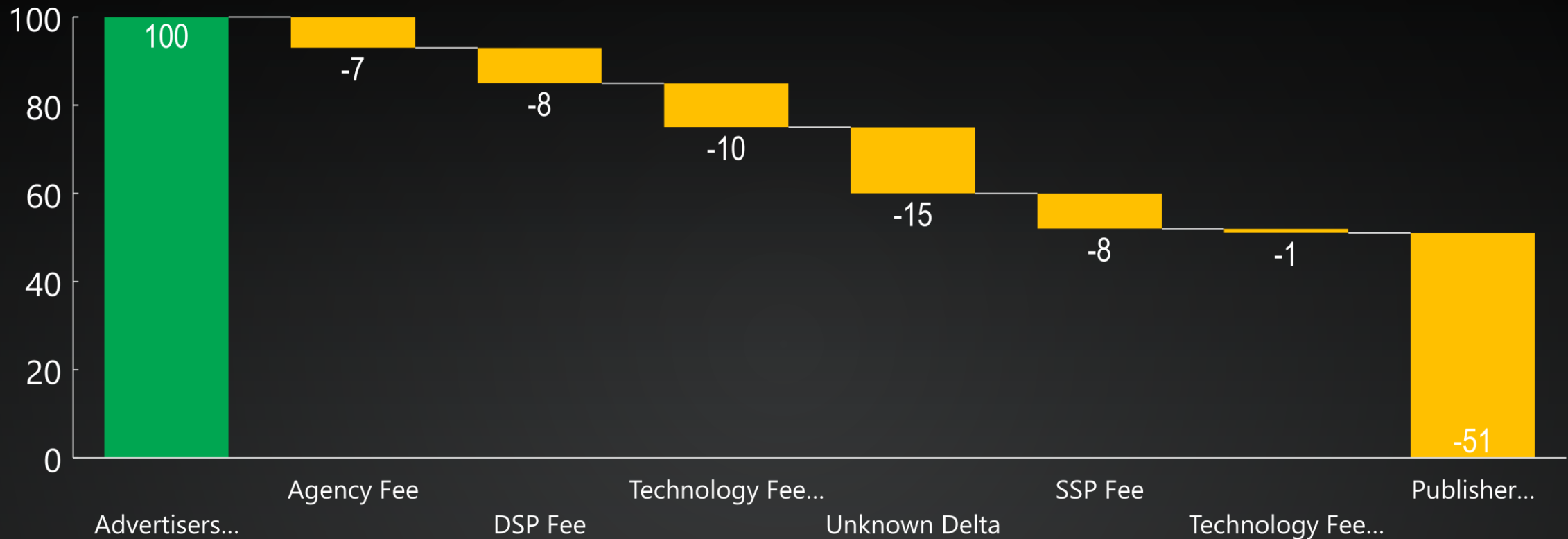


Privacy for

America®

**Programmatic
Media
Transparency**

COST TO BRANDS: \$20 Billion



Brand Suppliers: 25%

Publisher Suppliers: 8%

Unknown: 15% (@ 1/3 of the supply chain providers)

Programmatic Media Transparency Study

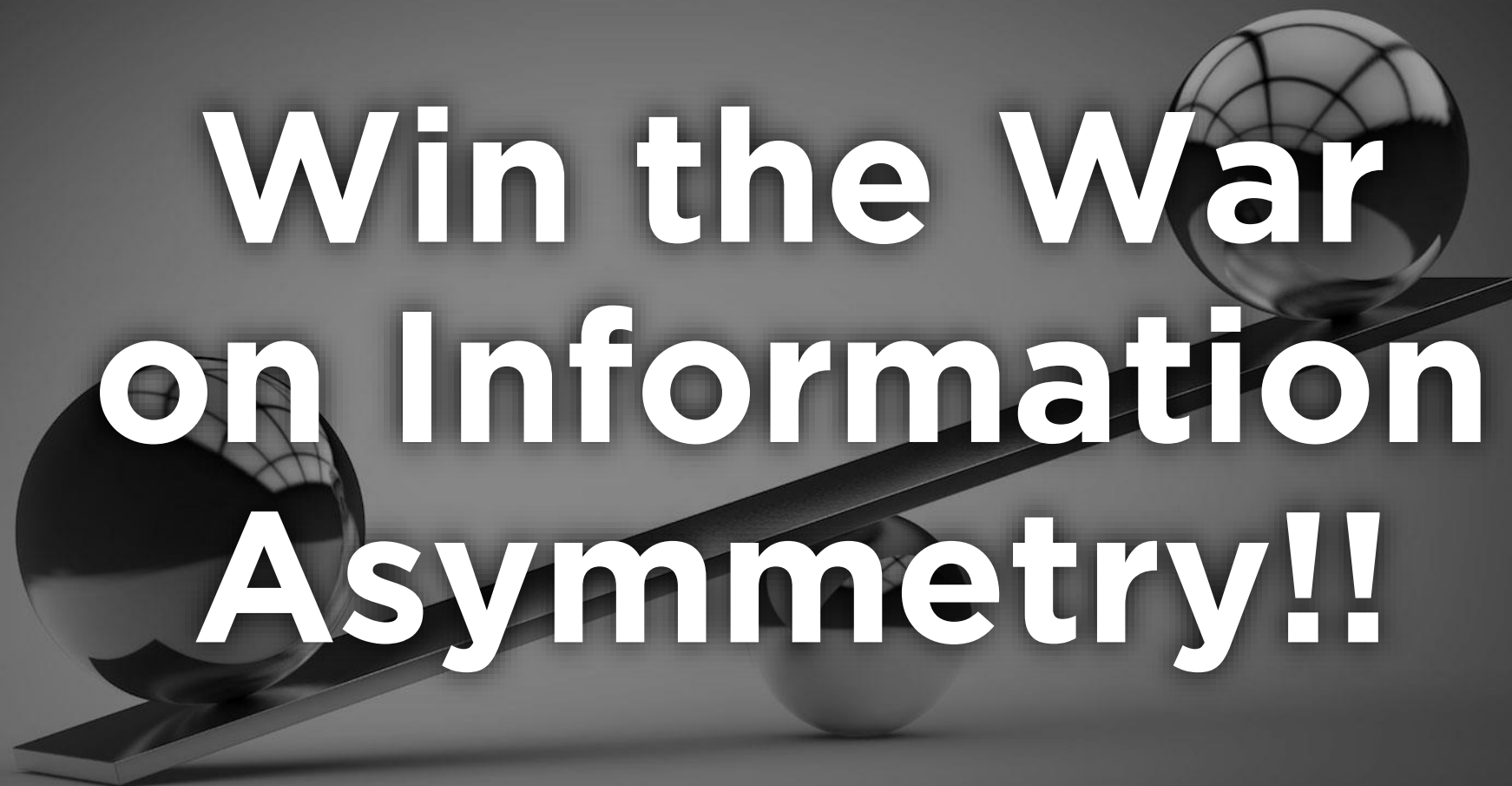
- Market riddled with material issues, lack of transparency, fractured accountability, and mind-numbing complexity
- Identify ways for advertisers to eliminate waste
- Billions of \$\$ in productivity and savings to be gained



Programmatic Media Transparency RFP

Eliminating Waste Throughout the
Entire Programmatic Marketplace

APRIL 2021



**Win the War
on Information
Asymmetry!!**

Measurement



THE CROSS-MEDIA MEASUREMENT MISSION

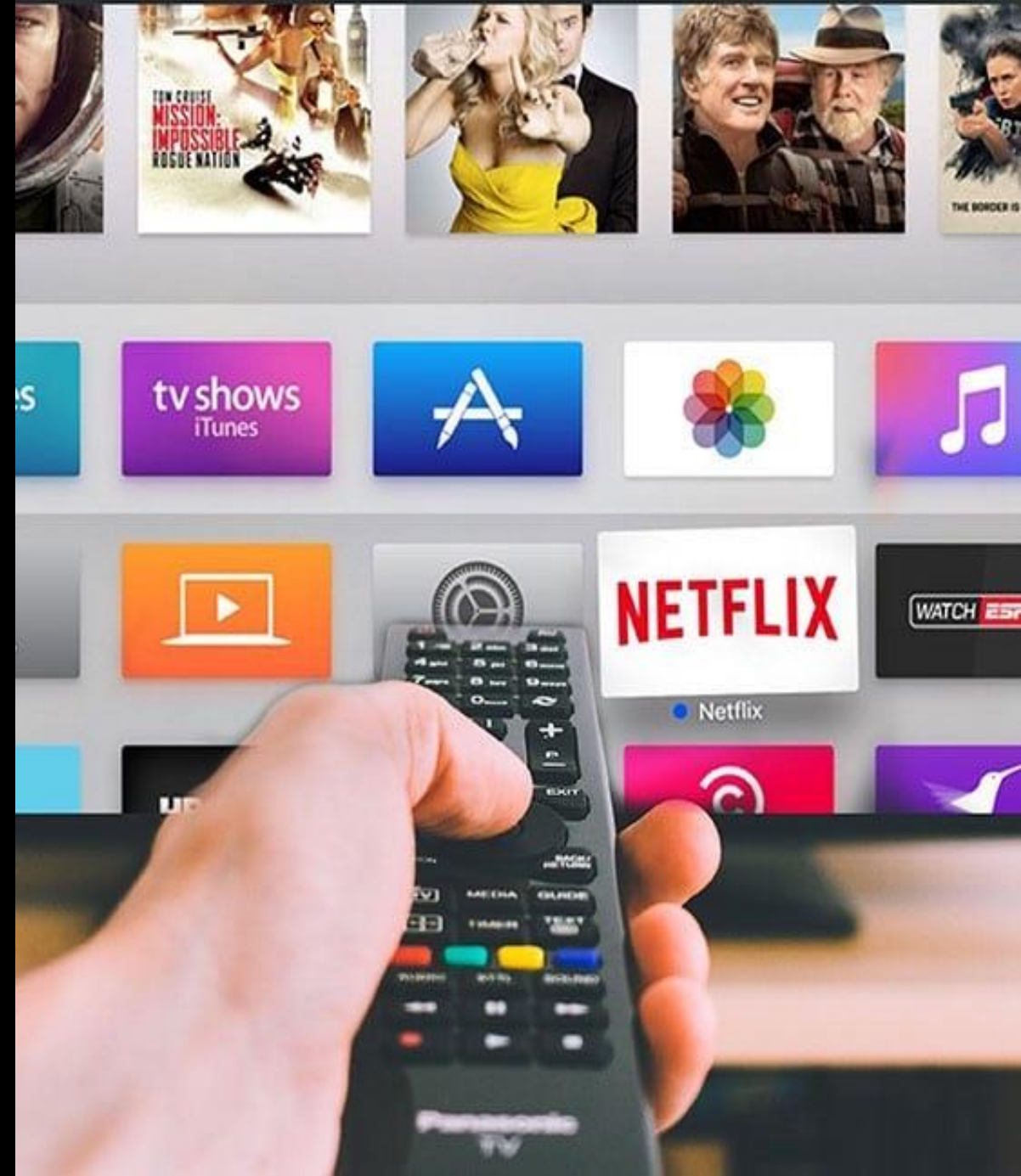


- To create a marketer-centric cross-media measurement system for advertising providing complete measurement of all ad exposures
- Enables planning optimization, frequency management, and outcome measurement
- Ensure relevant and positive consumer ad experience

Connected TV

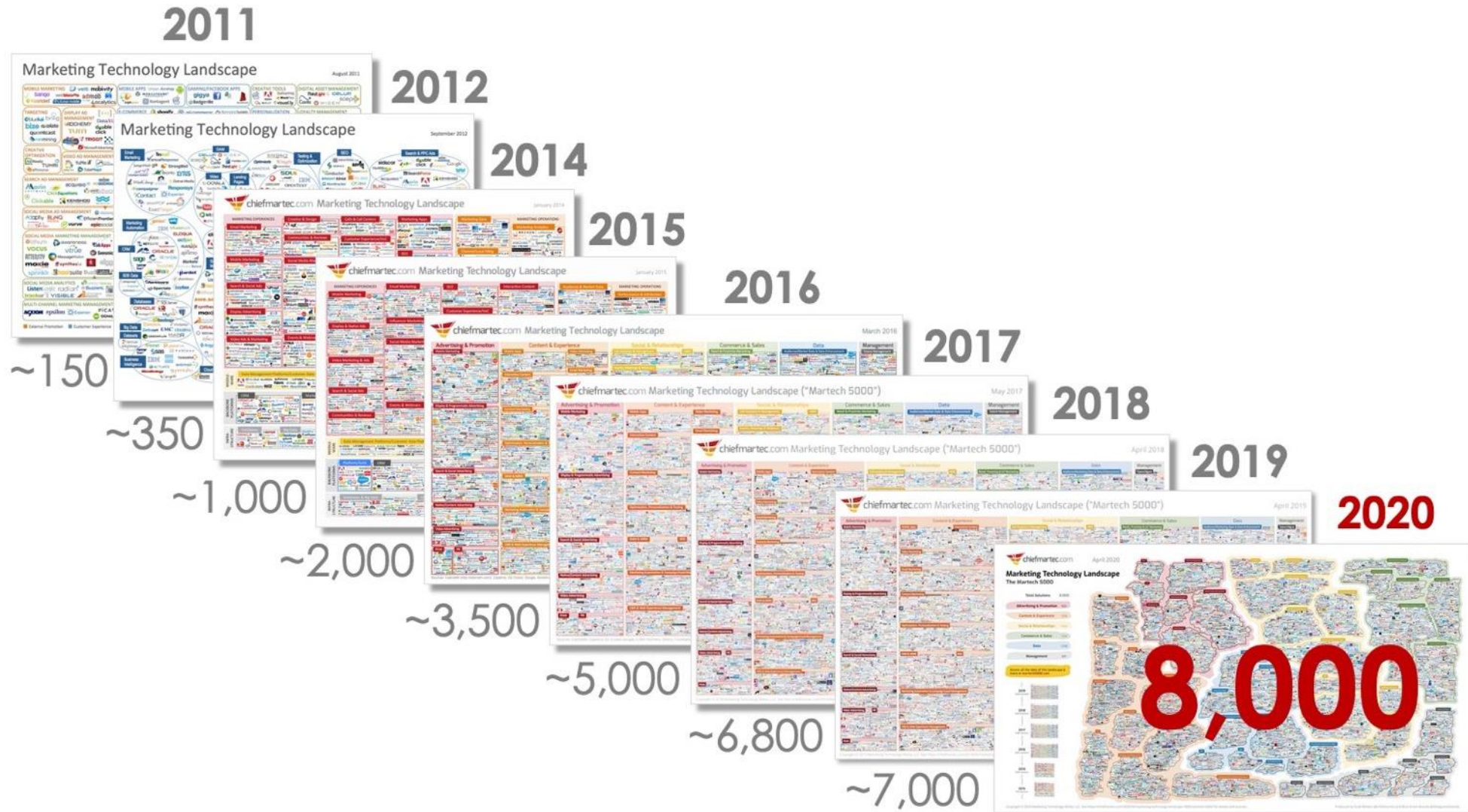
Connected TV

- 78% TV HH, +123% YOY
- \$13B US ad spend 2021
- 50% CTV programmatic
- IVT rates 19% - 24%
- Need common standards for all video screens



MarTech

Addressing The MarTech Explosion



- CMO's have spoken: vendor-driven contract forms are **not** working
- The new **ANA** template will help marketers secure better contract terms for their MarTech arrangements

MASTERING THE TECH STACK CONTRACTS

The background of the slide features a dark, blurred image of a hand holding a pen over a document. In the background, there is faint, glowing text that appears to be code, including symbols like semicolons, parentheses, and variable names such as 'use_array(a, b)'. The overall aesthetic is professional and tech-oriented.

Brand Safety



**A
MASSIVE
step forward**



GARM Aggregated Measurement Report

Volume 1 | April 2021

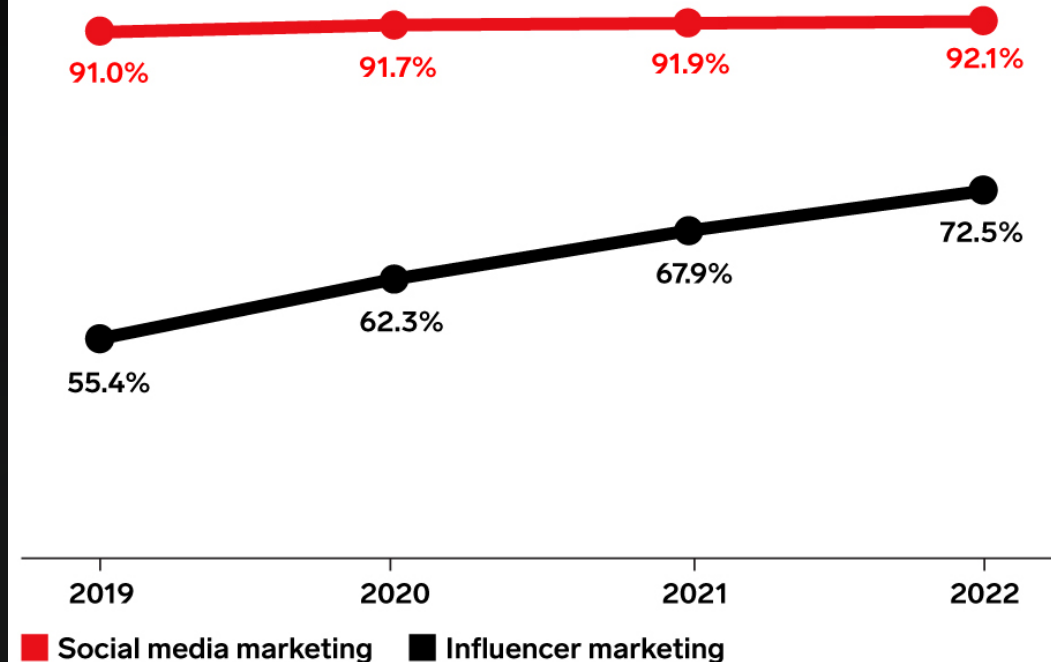


Influencer Marketing

- Fast growth social media platform
- \$24 billion category by 2025
- No consistency or standardization of metrics across platforms
- Hype Auditors Annual Fraud Report: only 60% of Instagram followers in US real users
- ANA Influencer Advisory Board hard at work
 - Standardized measurement guidelines
 - Remuneration transparency
 - Diversity influencer representation

Share of US Marketers Using Social Media and Influencer Marketing, 2019-2022

% of total marketers



Note: companies with 100+ employees; includes both paid and unpaid (i.e., compensation in the form of free product or trips) brand-influencer partnerships

Source: eMarketer, Nov 2020

262207

eMarketer | InsiderIntelligence.com

**Gender + Culture =
GROWTH**



pqmedia
CUSTOM MEDIA RESEARCH



KEY FINDINGS

Multicultural Marketing
represents only

5%

of the total advertising spend

Only

55%

of marketers employ
Multicultural Marketing



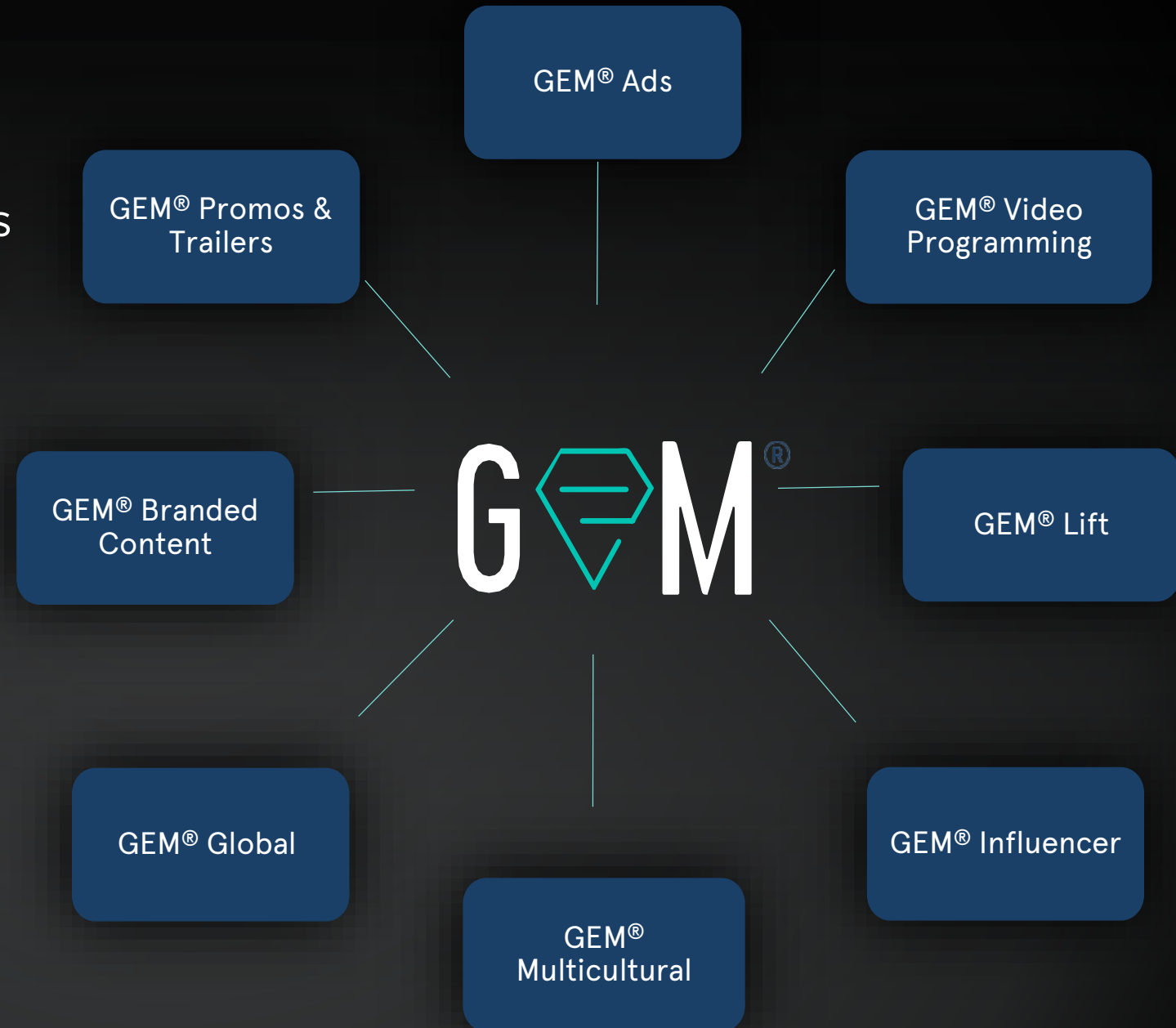
SEEHER

Mission:

To drive the accurate portrayal of women and girls in marketing, advertising, media and entertainment, so they see themselves as they truly are and in all their potential.

SEEHER

- 160,000+ ads tested over 4 years with category and platform benchmarks
- Available in 14 countries/ 87% of global ad spend
- Ads with high GEM scores
 - +33% brand recognition
 - +12% call to action
 - 5 x increase in sales for hi-scoring ads



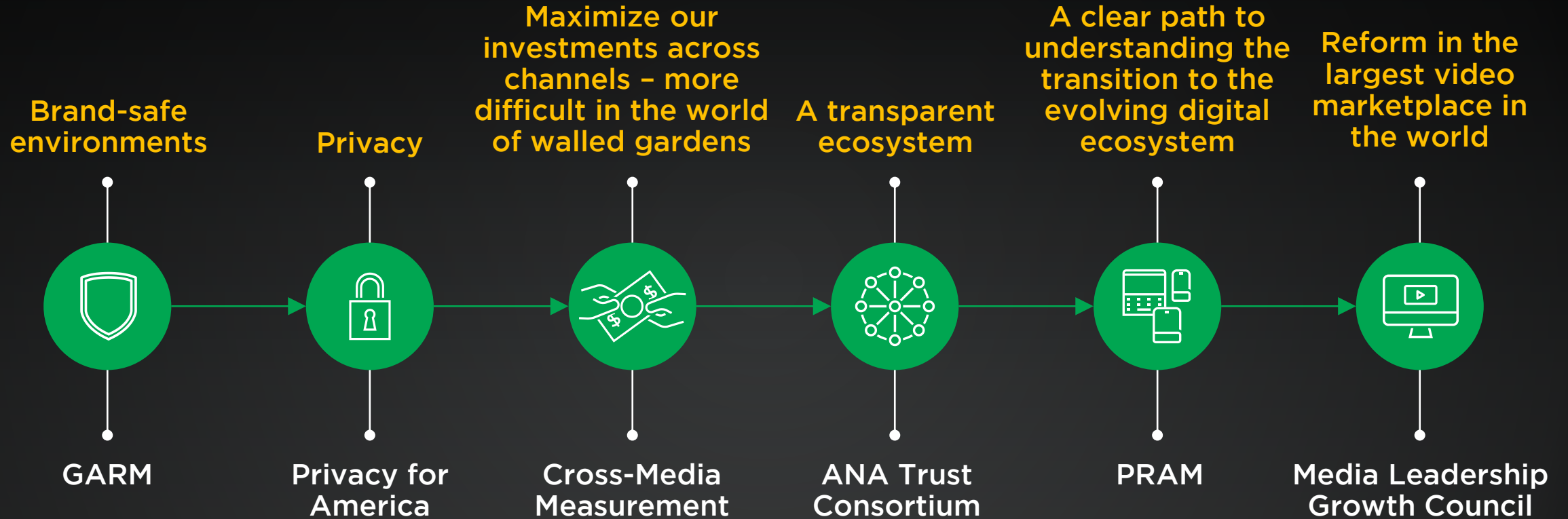


CULTURAL
INSIGHTS
IMPACT
MEASURE™



GILLETTE

On a Journey of Success





**NOT A TIME
FOR THE
TIMID**

- A time of big opportunities and equally big challenges
- Billions \$\$ in growth opportunity and Billions \$\$ in waste
- Take back our industry
- Stand as an industry
- Own and lead the agenda



Be a force
for **good...**

and a
force for
growth.

MARC PRITCHARD

ANA Chairman & Chief Brand Officer

DREAM

CRAZY



Nike

ANA GROWTH AGENDA





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