

ANA

2022 ANA

ADVERTISING FINANCIAL MANAGEMENT CONFERENCE

Bob Liodice
CEO



The Environment

- COVID
- Social Strife
- Economic and Supply Chain Dislocation
- Invasion of Ukraine

The New Reality

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

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**Planting the seeds
for an
optimistic future**



**Our profession needs to
obsess about the humans at
the heart of business.**

**If we can figure out how to
serve their needs, this will be a
much richer profession.**

DEAN ARAGON

Chief Marketing Officer



B4H

BrandsForHumans



Simply put...
humanity is
the name of the game.

ABInBev

Marcel Marcondes
Global President, Beyond Beer Co.



Show up and
stand up as a brand.

Be there with a sense of
responsibility, empathy,
and **purpose.**

Marisa Thalberg
EVP, Chief Brand and Marketing Officer



**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



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

and a
force for
growth.

MARC PRITCHARD

ANA Chairman & Chief Brand Officer

ANA MISSION

DRIVING GROWTH

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

FORTUNE 500

Average Annual Growth Rates

2010-2015

1.9%

2015-2019

4.1%



2010-2019

3.1%

That

SUCKS!



COST OF
1 PP

\$500 BILLION
in Incremental
Global Growth
over 3 Years



THE ANA GLOBAL CMO GROWTH COUNCIL

A Global Force for Good and Growth



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CHIEF FINANCIAL OFFICERS: TAKE ACTION

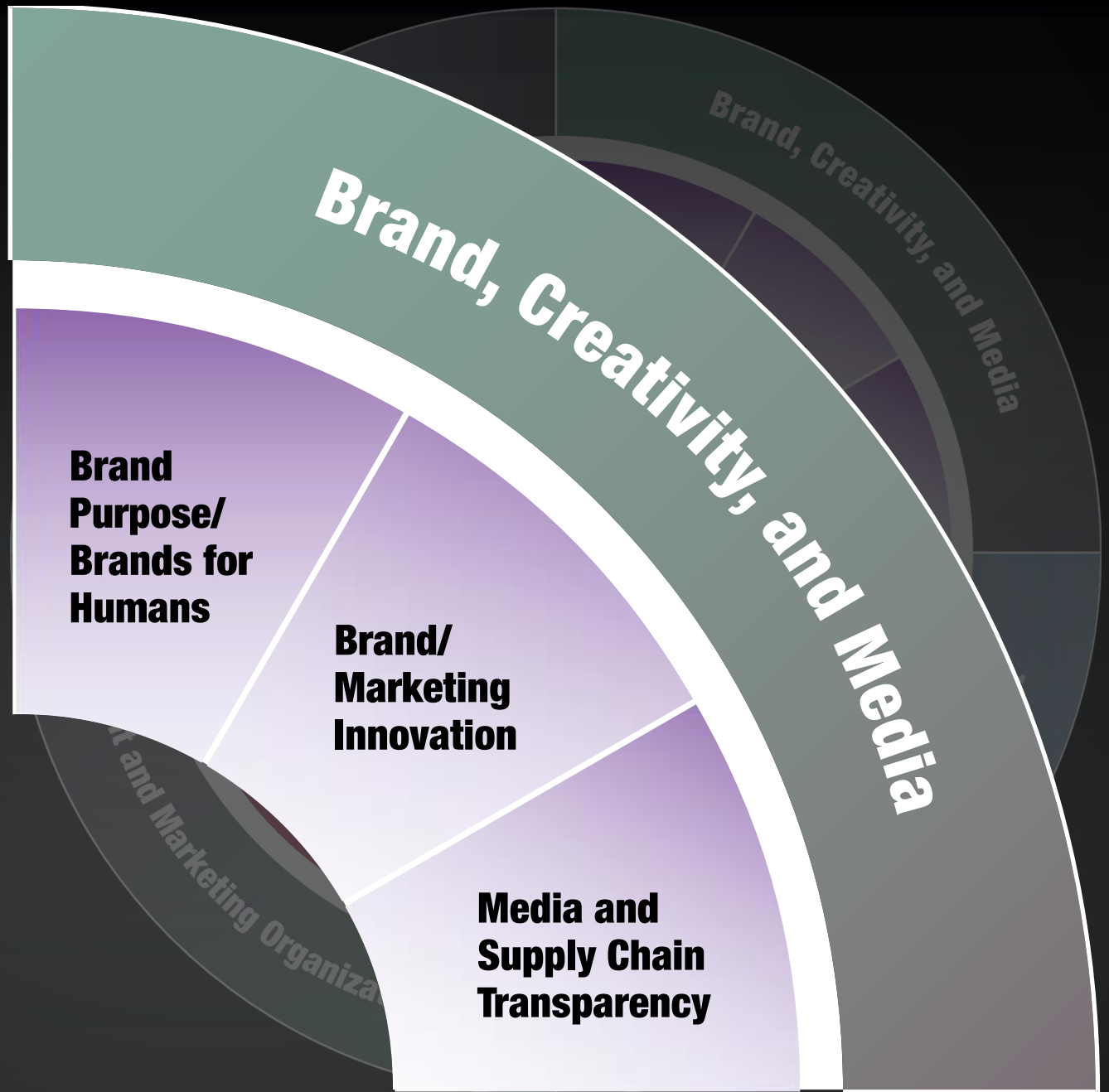
Acknowledge the
issue/opportunity

Commit to change

Engage the
“Business Machines”

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Brand

The
FINANCIAL
VALUE of
BRANDS
Imperative

Why Brands Must be Valued in Financial Terms

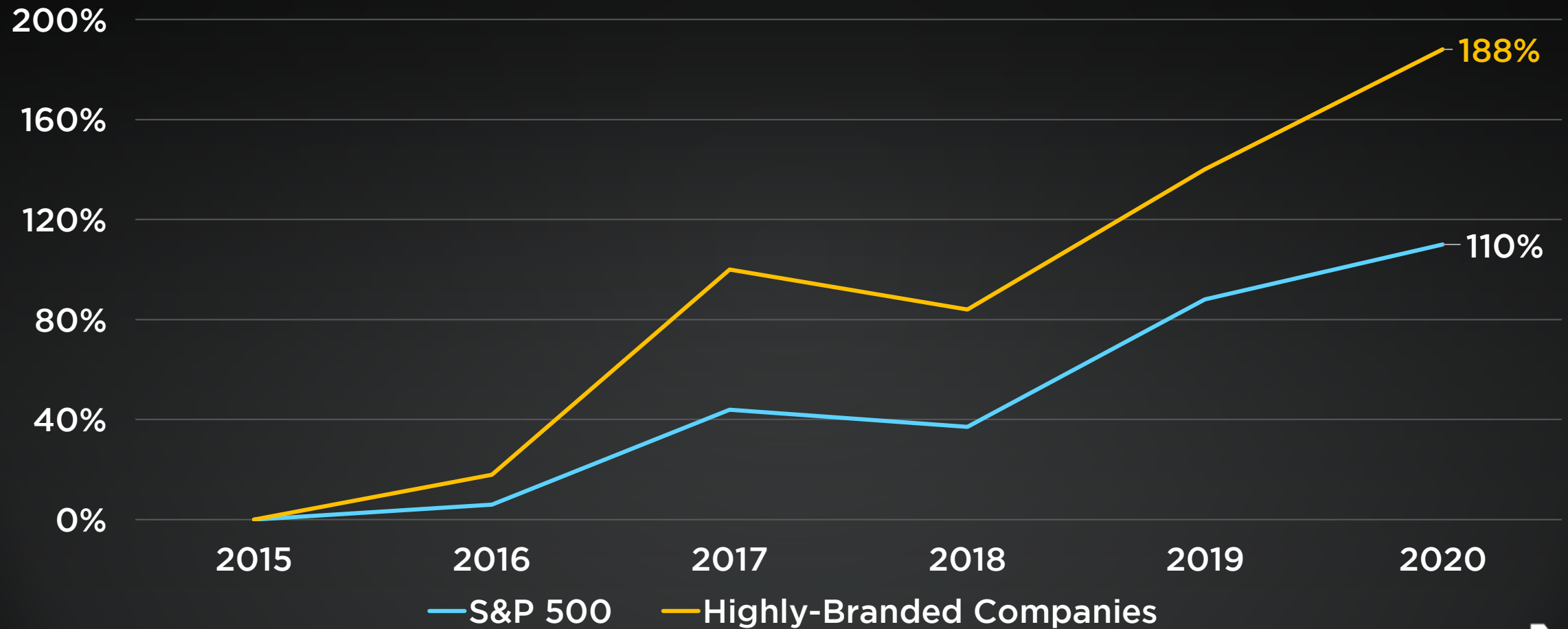
JUNE 2021

MASB

Marketing Accountability Standards Board

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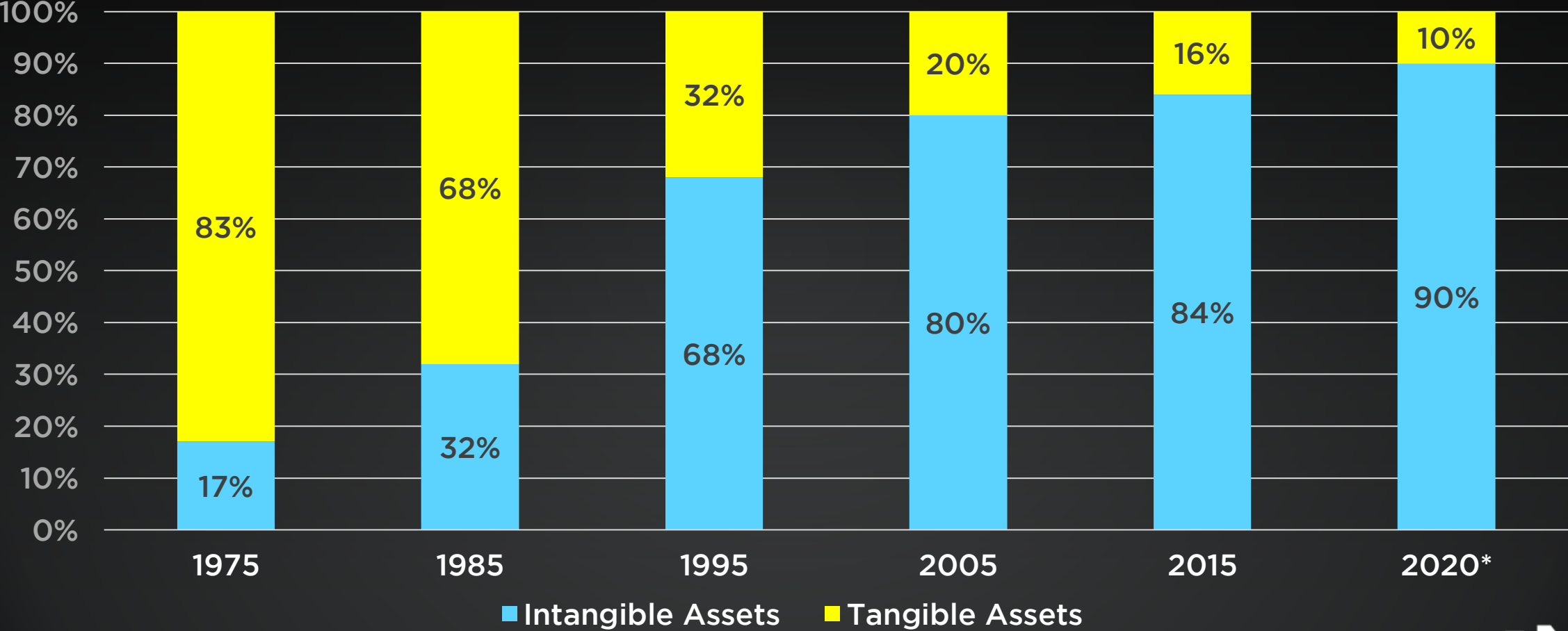
Most Highly-Branded Companies vs. S&P 500 Index



Source: Brand Finance



Components of S&P 500 Market Value



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



BUT...

**Activating and
Building Brands
has become**

CHALLENGING



ACTIVATING BRANDS

Investment
Creativity
Courage

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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



Courage

The brands that are growing the fastest today are those that intuitively **understand their customers...**

... and make **brave, iconic moves** that delight and deliver in new ways.

CHARLES TREVAIL

Global Chief Executive Officer

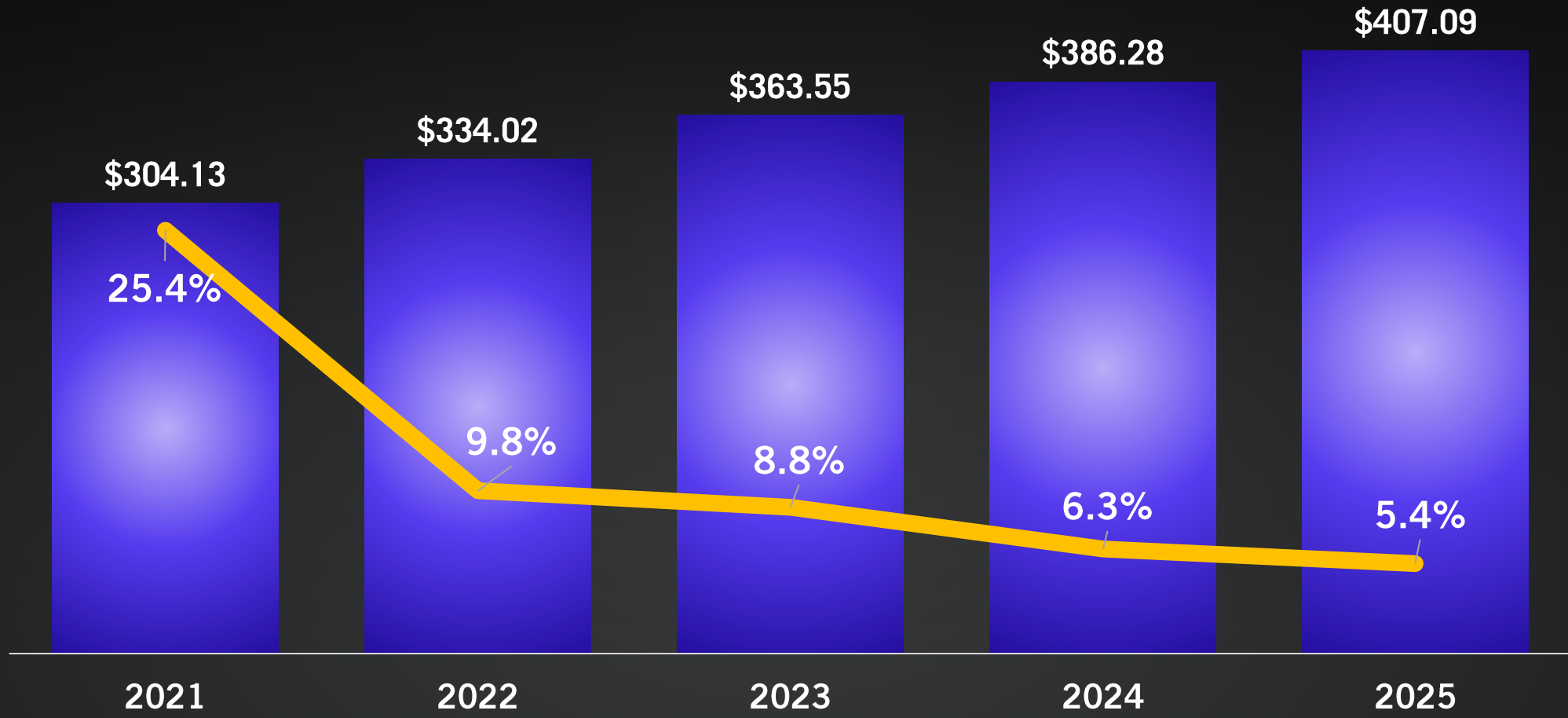
Interbrand



Media Landscape

Total Media Ad Spending

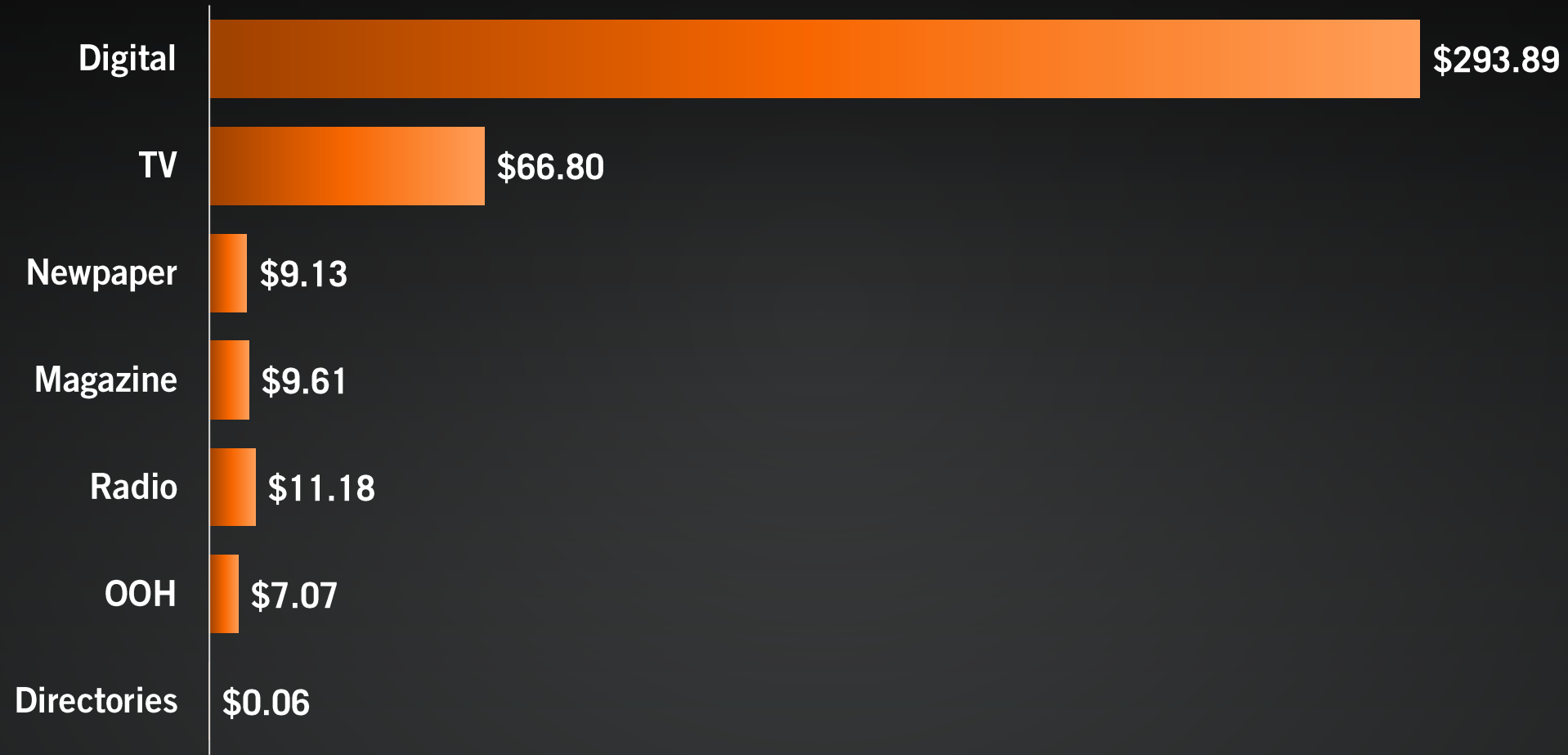
U.S. 2021-2025 (billions)



Source: eMarketer Oct '21

Total Media Ad Spending, by Media

U.S. 2022 (billions)





KEY FINANCIAL PRIORITIES

- **Brand Building Media Strategy**
- **Media Supply Chain Transparency and Effectiveness**
- **Minority-Owned Media Investments**
- **New Media: Metaverse, AI, AR, Crypto**

Media Transparency

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

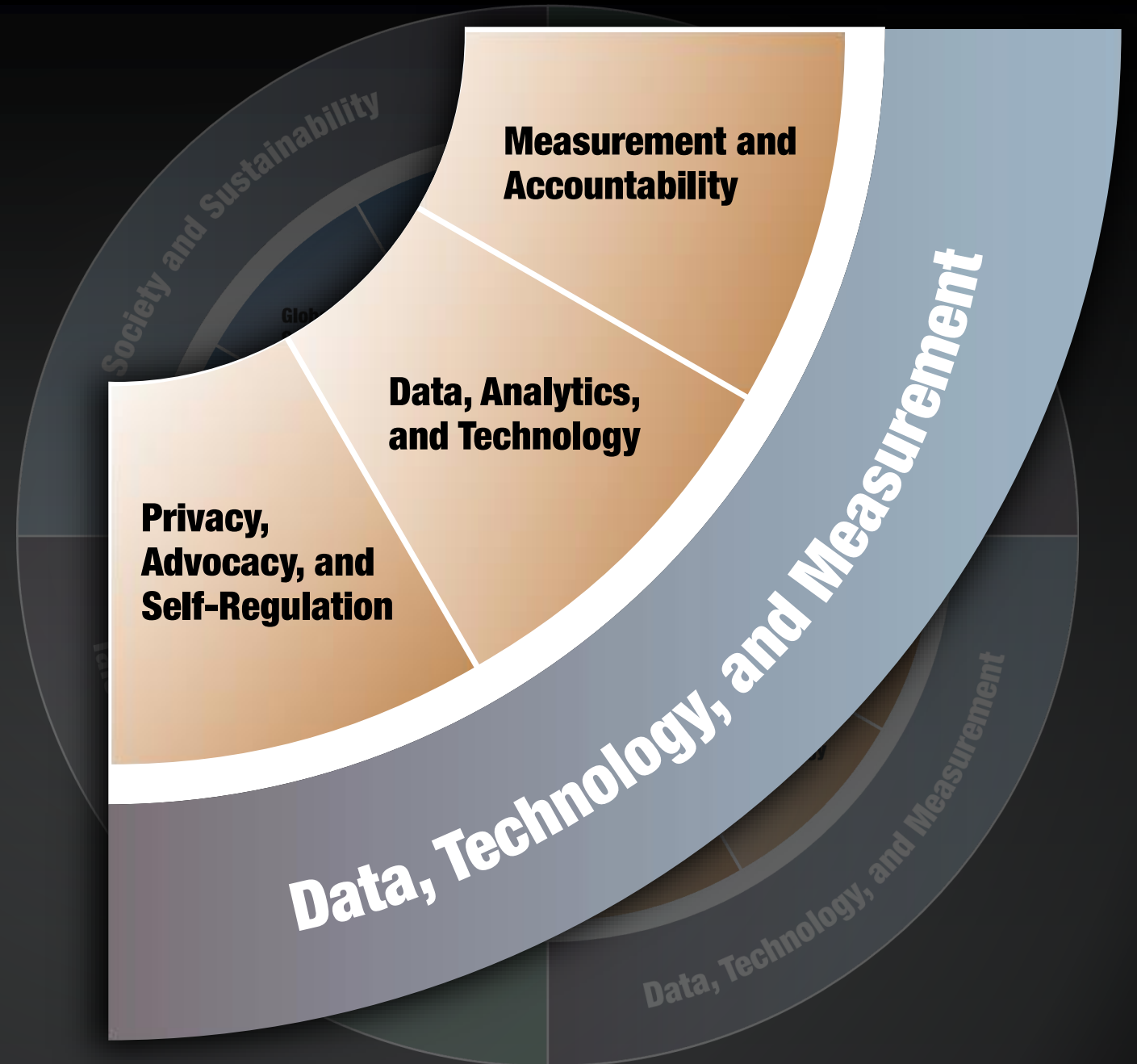


Programmatic Media Transparency RFP

Eliminating Waste Throughout the
Entire Programmatic Marketplace

APRIL 2021

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KEY FINANCIAL PRIORITIES

- **Data Transparency**
- **Cross-Media Measurement**
- **Privacy and Addressability**
- **Platform Self Regulation**

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

Privacy and Addressability

**3P Cookie
Deprecation**

**Apple
Opt-in**

Portfolio of Solutions

Digital Advertising Alliance

- **Alternative Media Identifiers**

Marketers

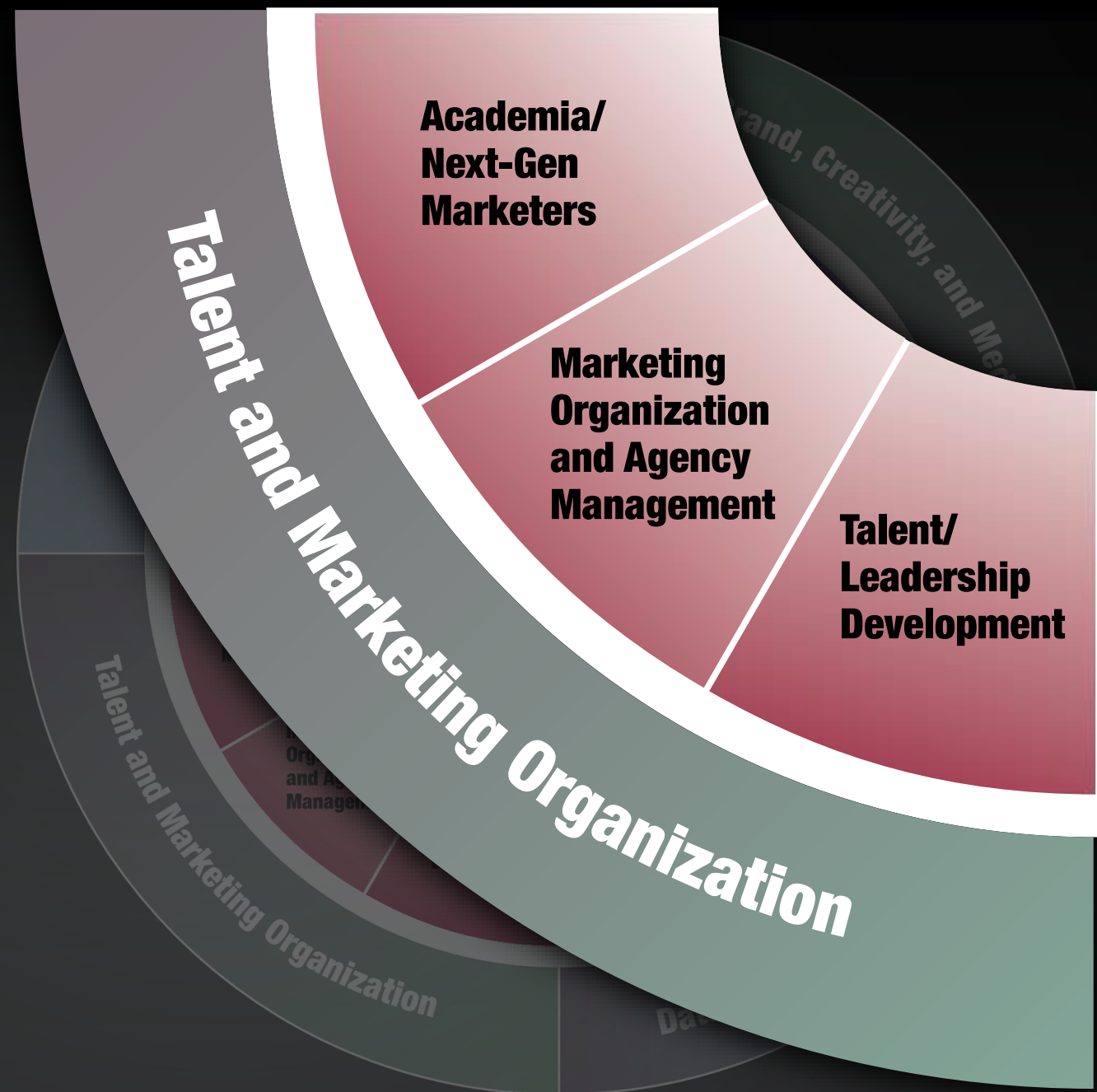
- **Non-Identity Solution Testing**



Privacy for

America®

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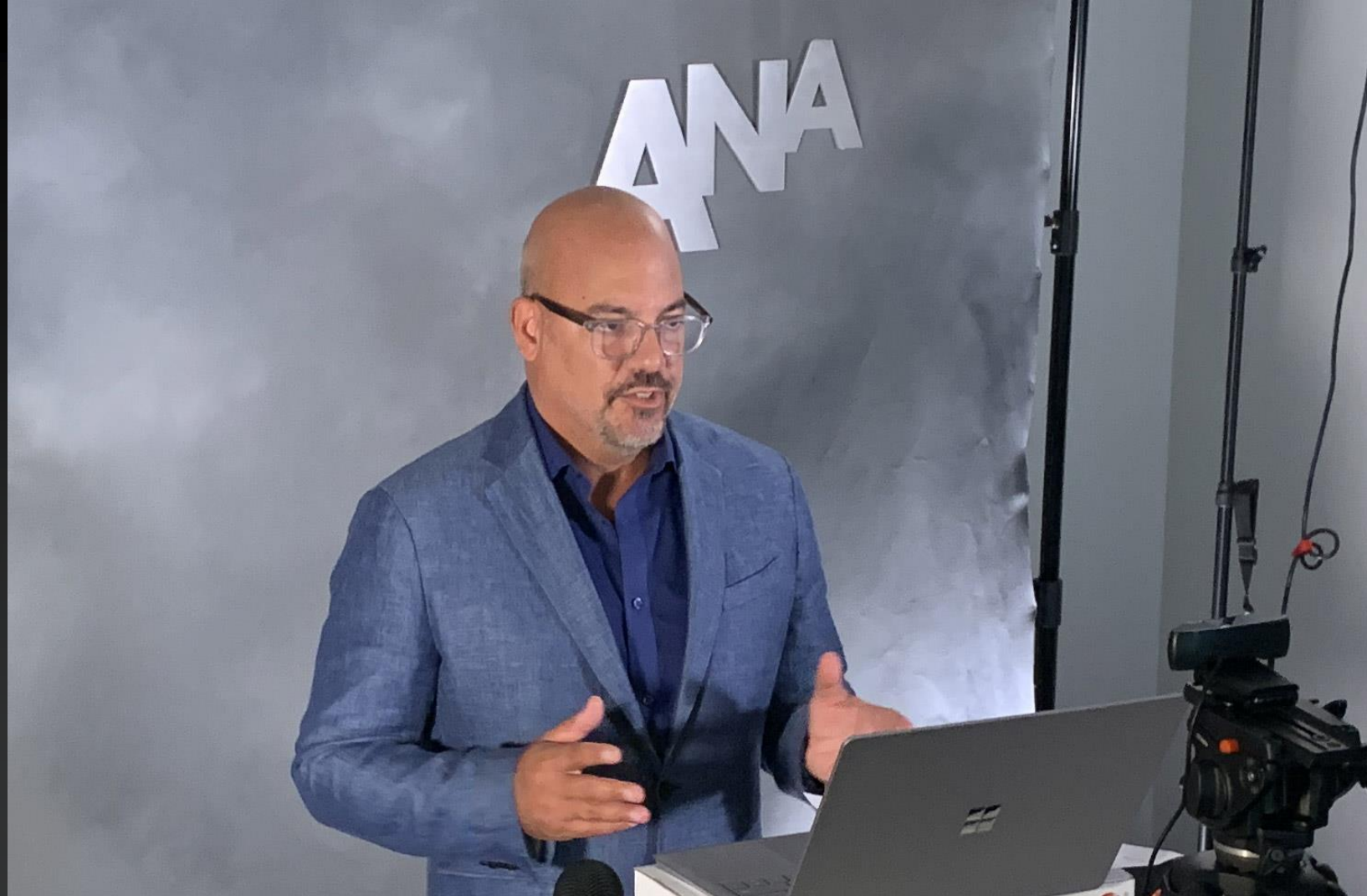




KEY FINANCIAL PRIORITIES

- **Talent Development**
- **Leadership Development**
- **Agency Management and In House Agency Strategy**
- **Academia: Preparing for the next generation of marketing executives**

ANA's Global Day of Learning



CMO
GROWTH COUNCIL

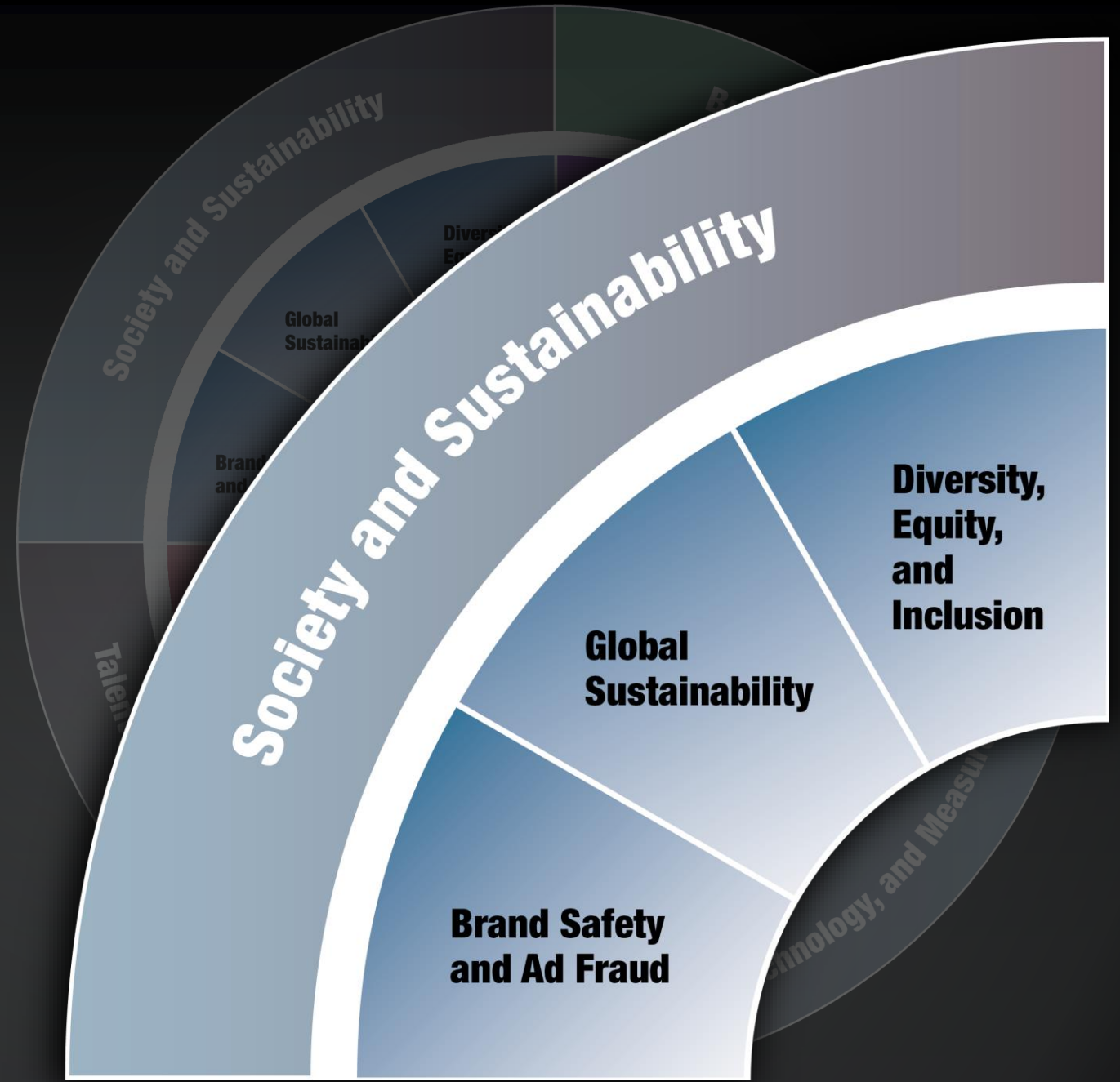


RESET
REBOOT
REOPEN

MARKETING'S GLOBAL DAY OF LEARNING



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KEY FINANCIAL PRIORITIES

- **Supply Chain Diversity, Equity, and Inclusion**
- **Supplier Diversity**
- **Media Sustainability**
- **Ad Fraud and Brand Safety**

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Diversity, Equity, and Inclusion



ANA BUSINESS ENTERPRISES



185 Member Companies



77 Universities



93 member companies

**Accurate Portrayal
of Women
and Culture
in Brand Ads**



**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**

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HUMANITY FOR GROWTH

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CEO

