

ANA

2022 ANA

MEASUREMENT & ACCOUNTABILITY CONFERENCE

presented by  Meta

Bob Liodice
CEO

Environmental Challenges

- COVID
- Stagflation
- Social Strife
- Global Unrest / Ukraine Invasion



INDUSTRY HEADWINDS

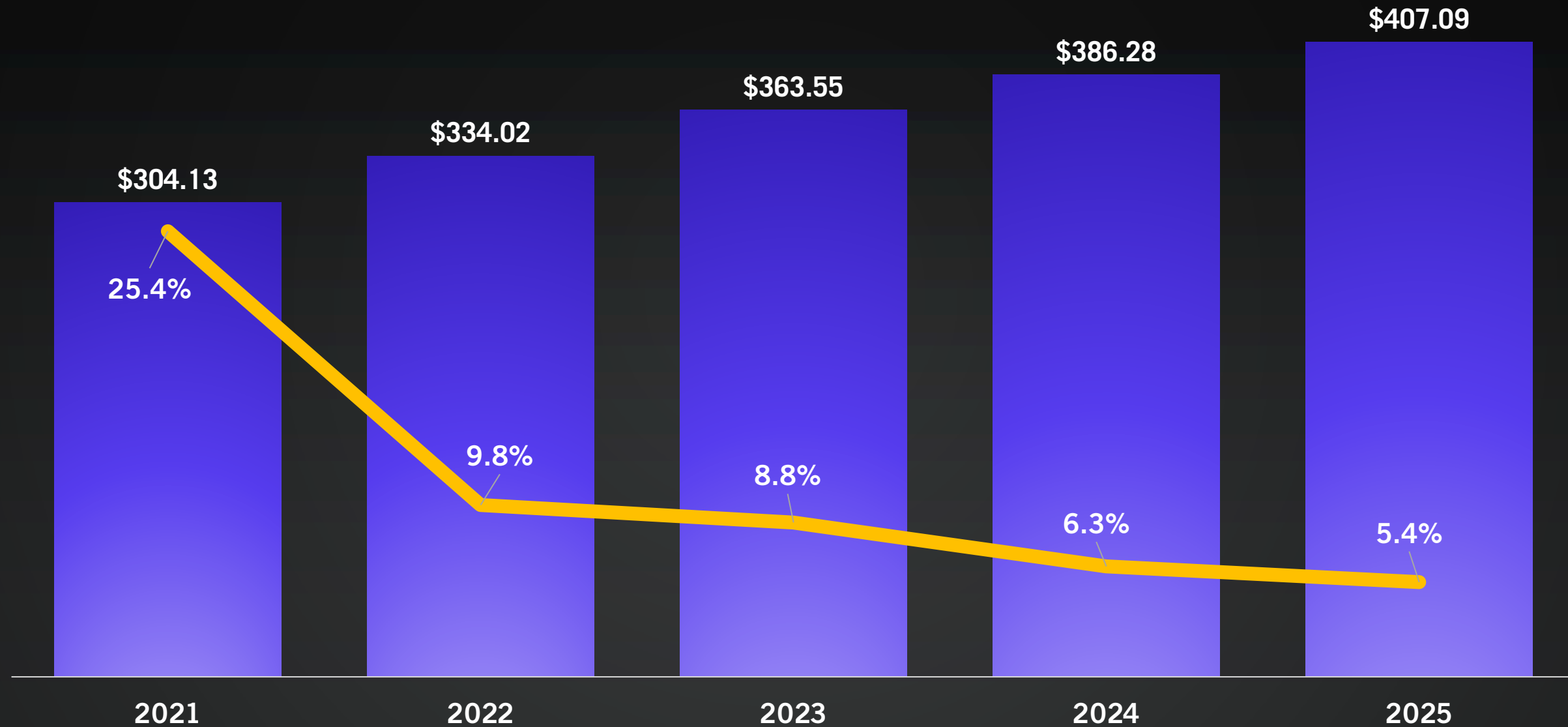
- **Measurement and Accountability**
- **Programmatic Media Transparency**
- **Privacy and Addressability**
- **Talent / DEIB**
- **Sustainability**
- **... and Many More**

**Digital/Technology
plants the seeds
for an
optimistic future**

Dynamic Media Landscape

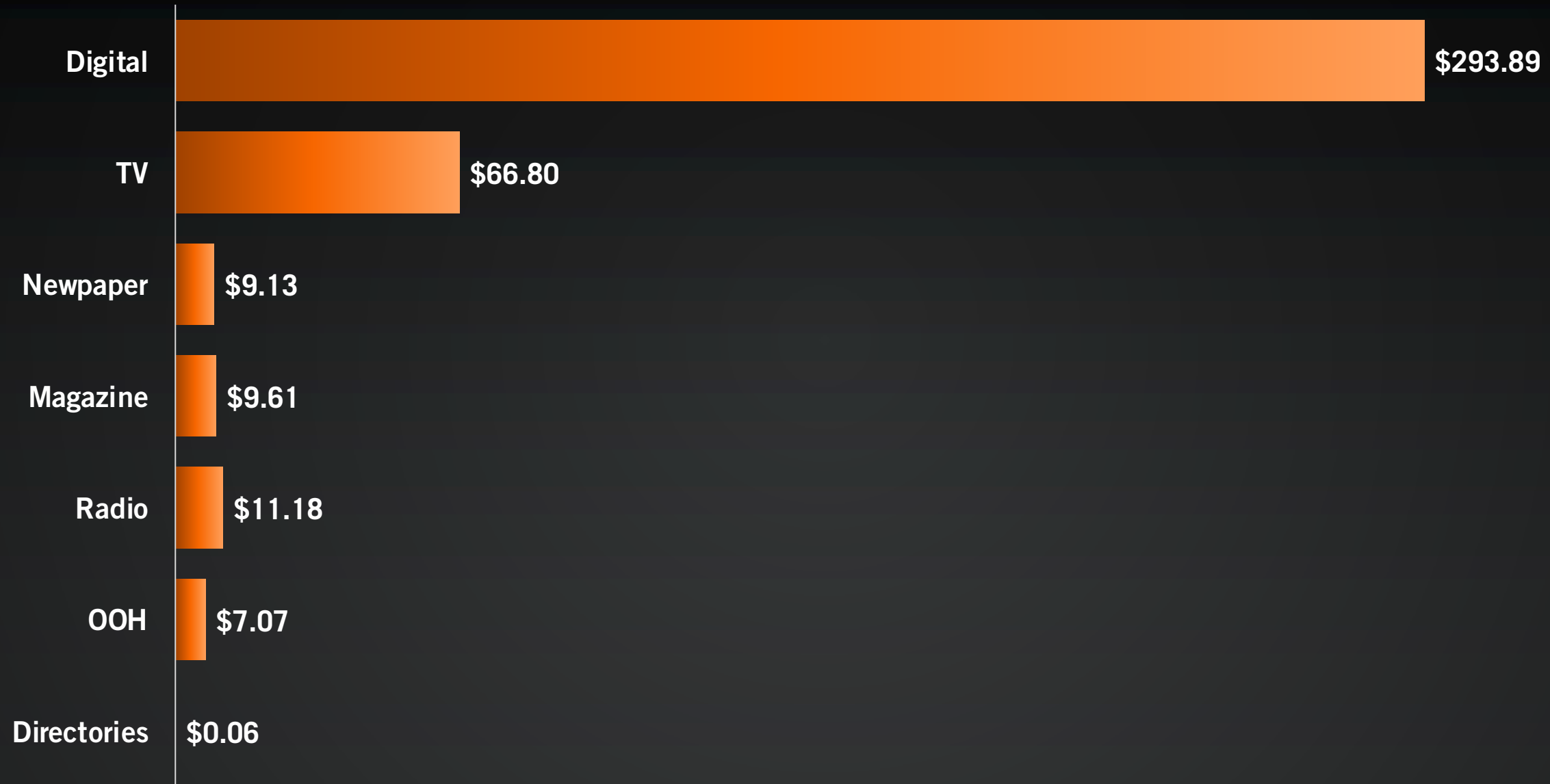
Total Media Ad Spending

U.S. 2021-2025 (billions)



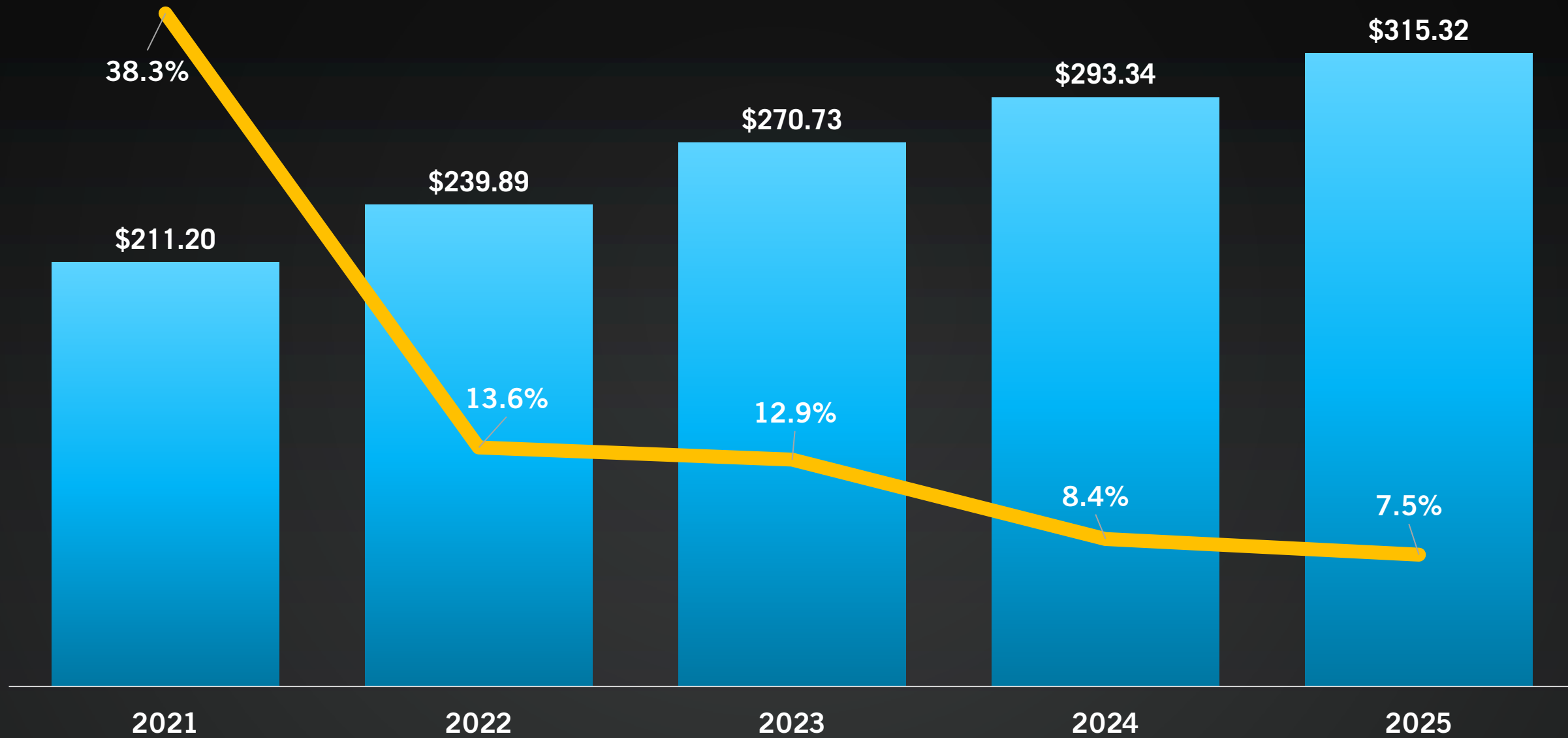
Total Media Ad Spending, by Media

U.S. 2022 (billions)



Digital Ad Spending

U.S. 2021-2025 (billions)



Source: eMarketer Oct '21



DIGITAL MARKETING TRENDS

- **Influencer marketing takes center stage**
- **TikTok advances viral commerce**
- **Personalization delivers customized experiences**
- **AI/Metaverse are here to stay**
- **Long-form video content consumes more screen time**

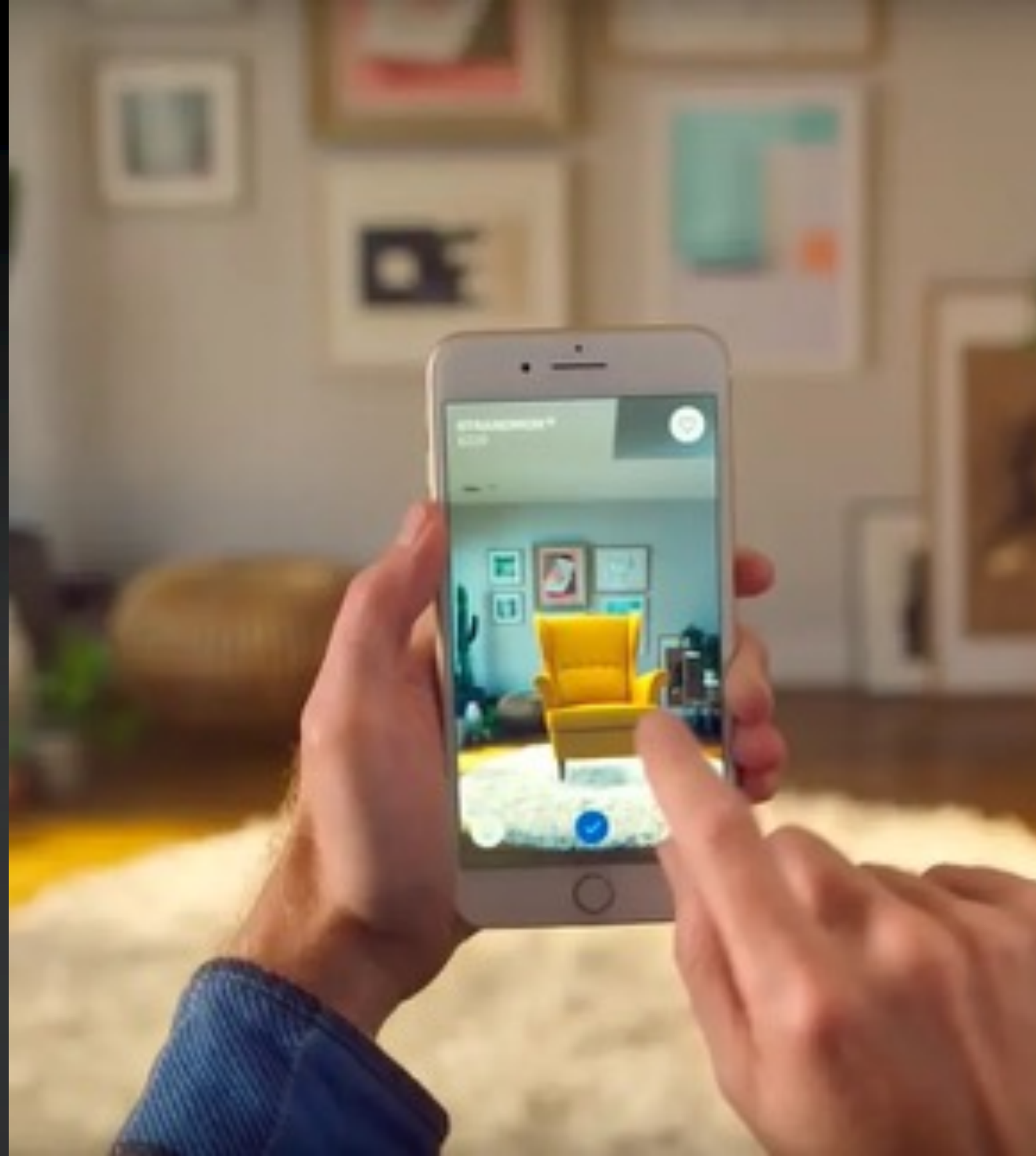
**Global metaverse
projected to reach
\$1.7T by 2025**



Welcome to the Meta Lite Bar, the first-ever brand hosted bar in the metaverse and the only place
MEANT FOR 21+

 Meta

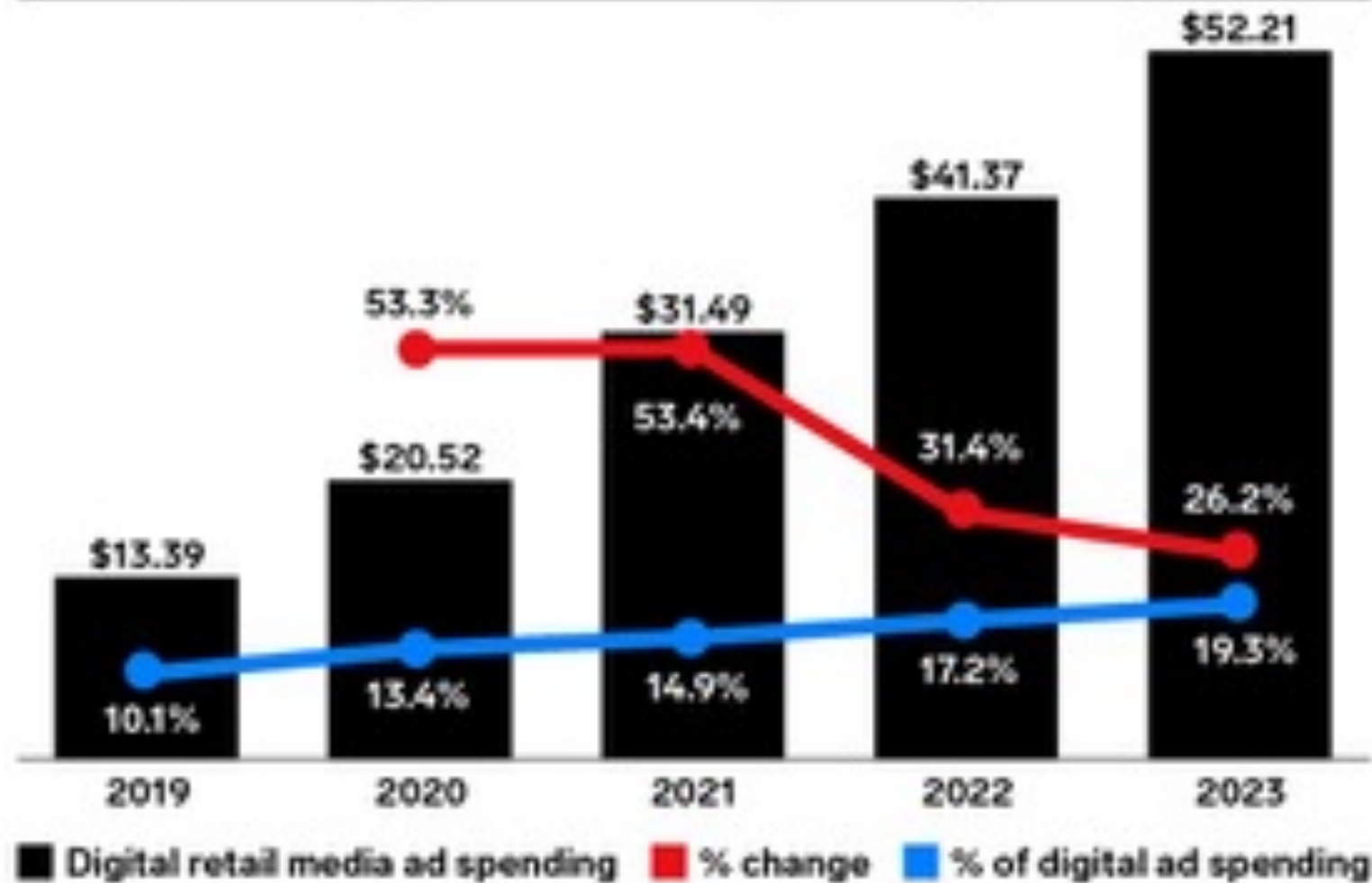
**5G accelerates VR,
AR and XR
and delivers richer,
more immersive
brand experiences**



Retail Media Networks

- \$50B ad category... and growing
- Capturing 1 in 5 digital dollars

US Digital Retail Media Ad Spending, 2019-2023
billions, % change, and % of digital ad spending



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

Source: eMarketer, Oct 2021

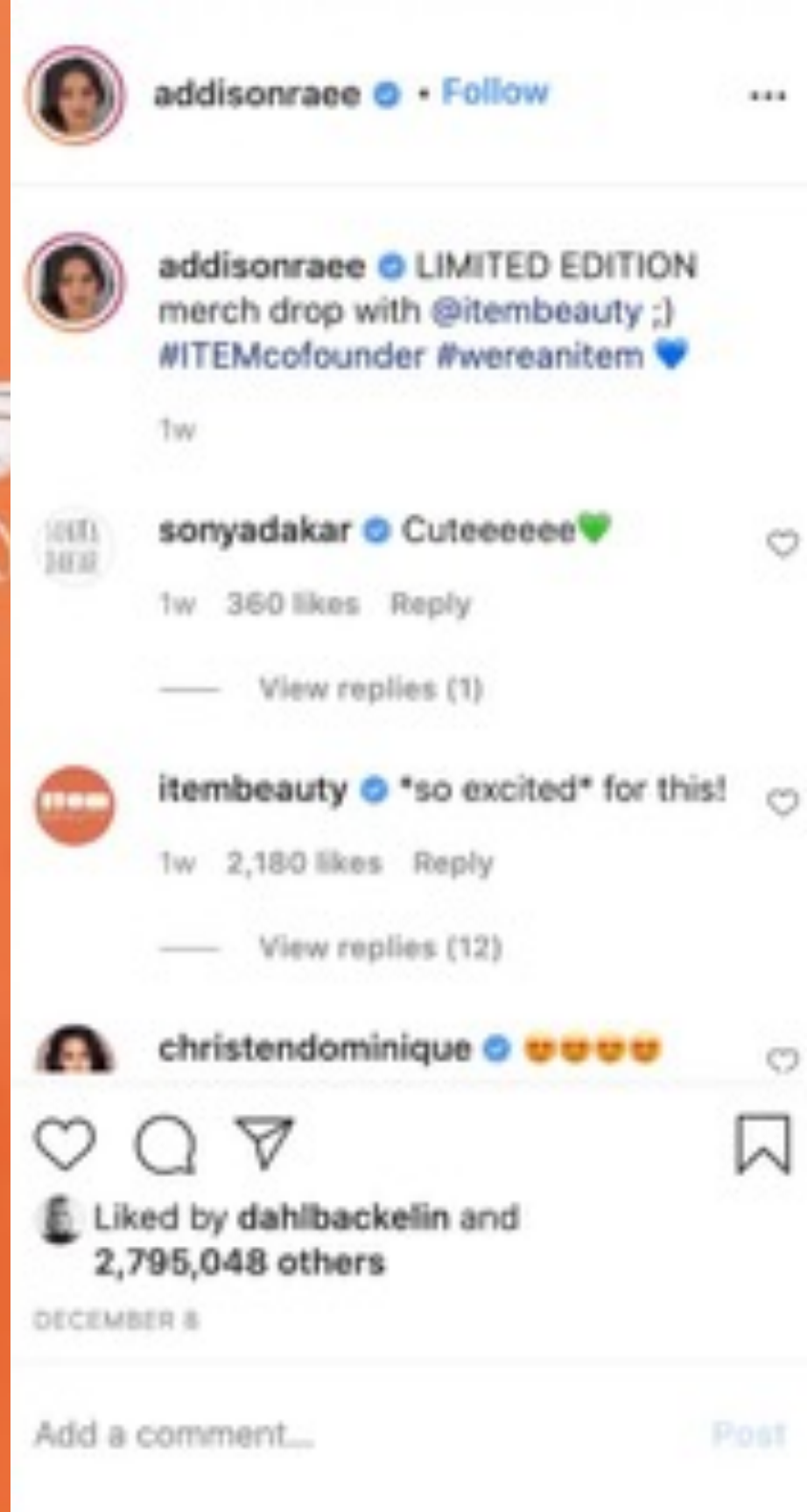
The Power of Social Shopping

In just one day in October 2021, two of China's top live-streamers, Li Jiaqi and Viya, sold \$3 billion worth of goods – 3X Amazon's average daily sales



Influencer Marketing

- \$13.8 billion global industry-\$4B in US
- Projected \$25 billion by 2025



MEDIA MEASUREMENT CHALLENGES

- **Complexity undermines accurate measurement**
- **Ineffective decision making**
- **Sub-optimal business growth**



**THE U.S.
ECONOMY IS
NOT GROWING**

**Quarter 1
GDP**

(1.6)%

**Quarter 2
GDP**

(0.6)%

Fortune 500

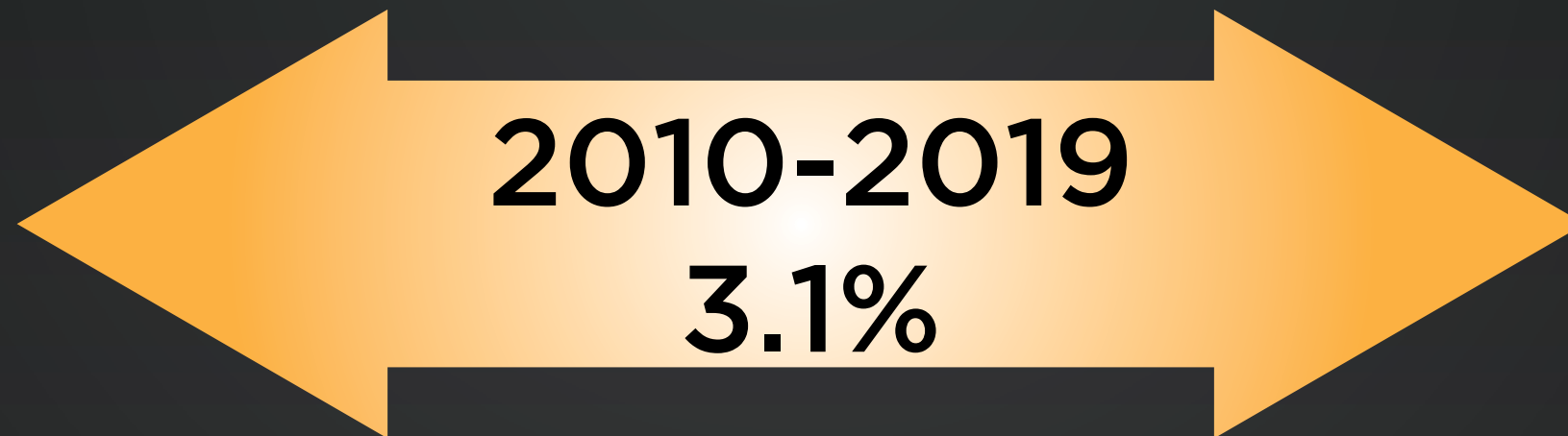
Average Annual Growth Rates

2010-2015

1.9%

2015-2019

4.1%



ANA MISSION

**DRIVING
GROWTH**

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



CMO
GROWTH COUNCIL



THE ANA GLOBAL CMO GROWTH COUNCIL

A Global Force
for Good and Growth

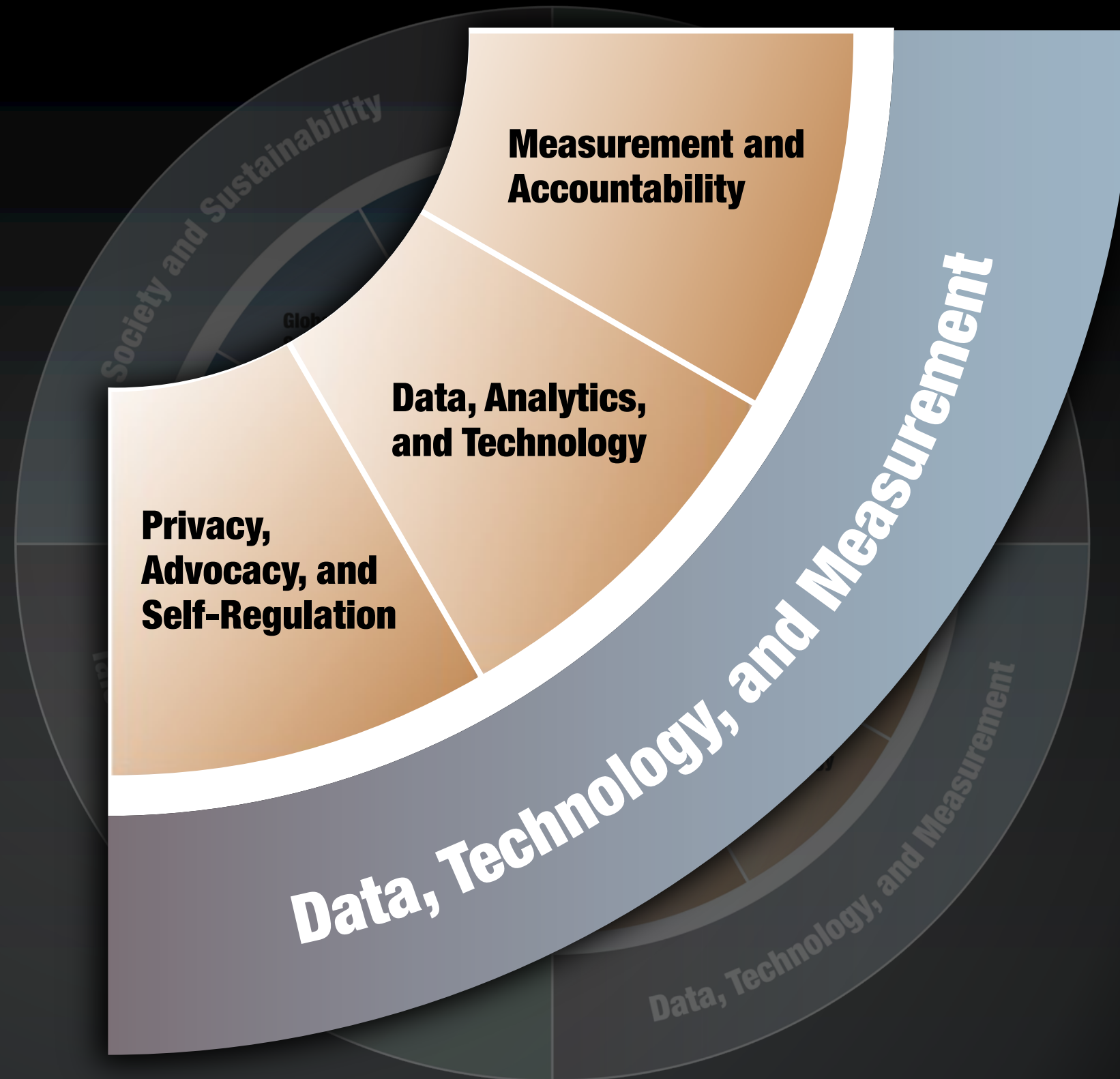


ANA GROWTH AGENDA



Force for Growth

ANA GROWTH AGENDA





**KEY GROWTH
ENHANCING
PRIORITIES**

**Data
Excellence
Measurement
Mastery**

**Data-Driven
Marketing
Drives Growth**

**Data, Analytics,
Technology, and
Measurement**
are the cornerstones
for unlocking **Growth**

DATA AND ANALYTICS

- **Investments in data analytics grew 37% between February 2021 and February 2022**
- **Marketers allocate 9% of their budgets to data and analytics**
- **Marketers allocate an 9% of their budget to customer analytics**

Sources:

CMO Survey Deloitte/ Duke Fuqua/ AMA 2022


Gartner - The State of Marketing Budget & Strategy 2022

What investments did your company make to improve the performance of your digital marketing activities over the last year?

Industry	% Reporting Yes	% Change Since Feb. 2021
Data analytics	77.5%	37.2%
Optimizing of company website	74.0%	0.3%
Digital media and search	70.9%	9.1%
Marketing technology systems or platforms	69.8%	29.7%
Direct digital marketing (e.g., email)	68.2%	19.0%
Online experimentation and/or A/B testing	47.3%	4.2%
Managing privacy issues	35.3%	23.9%
Machine learning and automation	26.4%	29.4%
Improving our app	24.4%	N/A

Source: The CMO Survey: The Highlights and Insights Report February 2022

**Accurate
Measurement
Drives Growth**



“**Video ad measurement** is a complete mess”

“ 50% of US TV advertisers agree that audience measurement and cross screen measurement need to be improved by the TV industry ”

Measurement Environment

COMPLEXITY OF MEASUREMENT SUBSTANTIALLY INCREASED OVER THE LAST 2 YEARS

- **Alternative currency testing disruption**
- **Growth of ad supported streaming and CTV ads**
- **Fragmentation and incompleteness of solutions**
- **Impact of Apple Tracking Transparency policy on measurement**

ANA Measurement Agenda

**Marketers
Must Own It**

MARKETERS' RESPONSIBILITY

“We make marketing decisions....

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

Doug Zarkin
Chief Marketing Officer

LUXOTICA®

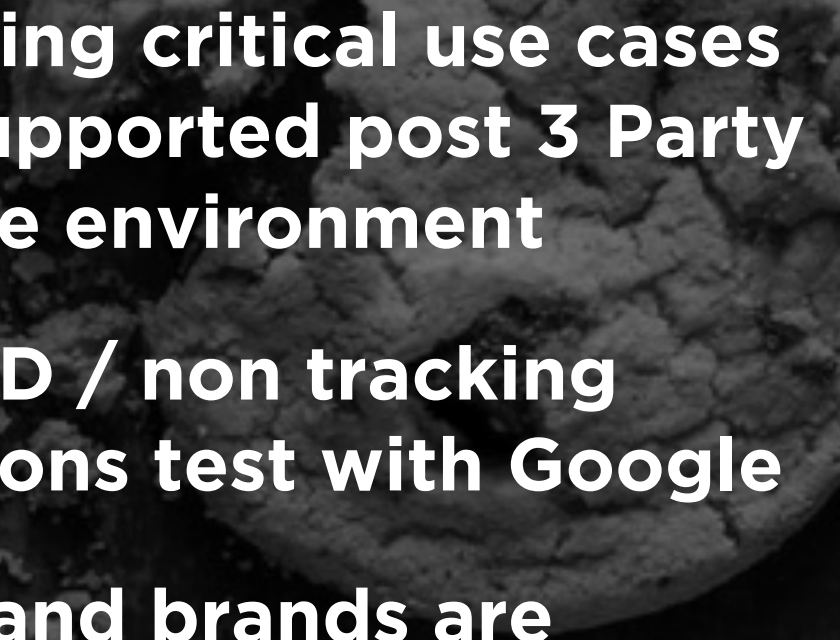


ANA MEASUREMENT AGENDA

- **Built through the lens of the marketer**
 - **Measurement Readiness in a Cookie-less Ecosystem**
 - **U.S. Cross-Media Measurement Initiative**
 - **Measurement in Diversity, Equity, and Inclusion**
- 
- A grayscale photograph of a hand holding a camera lens, positioned on the right side of the slide. The lens is the central focus, with the hand's fingers visible around it. The background is a soft, out-of-focus light gray.

Measurement Readiness in a Cookie-less Ecosystem

MEASUREMENT IN A COOKIE-LESS ECOSYSTEM

- Ensuring critical use cases are supported post 3 Party cookie environment
 - Non-ID / non tracking solutions test with Google
 - ANA and brands are participating
- 
- A large, round, cracked cookie is positioned on the right side of the slide, partially overlapping the list. The cookie is light brown with a cracked, textured surface, set against a dark, textured background that resembles a surface of sand or gravel.

**DEI Measurement
Drives Growth**

What's good for business is **diversity**.
And what's good for us is to advocate
in the right way.

Unwavering courage and a sustained
commitment are required...

And it has to last for years.

Manoj Raghunandanan

Global President, Self Care

Johnson & Johnson



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



CULTURAL
INSIGHTS
IMPACT
MEASURE™

SEEHER / GEM

- 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



**ANA Cross Media
Measurement (CMM)
Drives Growth**

**ANA
CROSS-MEDIA
MEASUREMENT
MISSION**

To deliver an industry-wide measurement solution that provides complete and objective measures of all ad exposures by reporting cross-media deduplicated reach and frequency measures

“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



**SIGNIFICANT
PROGRESS
AND WINS**

- **Revolutionary technical blueprint**
- **Testing blueprint with real US data**
- **Building an industry coalition**
- **2023 end-to-end test**
- **Scaling governance and infrastructure**



CMM
VALUE IMPACT

- **Improved Customer Experience**
- **Financial and Business Growth**
 - **Frequency Optimization drives savings of \$47B**
 - **Unduplicated reach and frequency drives improved media planning**
- **Advances Outcome Measurement**

ANA GROWTH AGENDA

