

ANA

2023

ANA Media Conference

Bob Liodice
CEO



A diverse group of people of various ages and ethnicities are shown in a state of intense celebration. They are all smiling broadly, shouting, and raising their arms in the air. Some have their hands clasped together, while others are pointing or making peace signs. The background is dark, making the people stand out. The overall mood is one of joy and triumph.

**Time to
CELEBRATE!!!**

Environmental Challenges

- COVID
- Stagflation
- Social Strife
- Global Unrest/Ukraine Invasion
- Crime
- Political Discourse



“We are sprinting through an endless obstacle course. Take a recovery break and reflect on what the world needs now and what we can do as marketers and business leaders to help. The world is ripe for even more purpose and positivity.”

Esi Eggleston Bracey
COO, Beauty & Personal Care



Humanity
drives the
most powerful insights.



Ukonwa Ojo
Former Chief Marketing Officer
Amazon Prime Video and Studios



“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

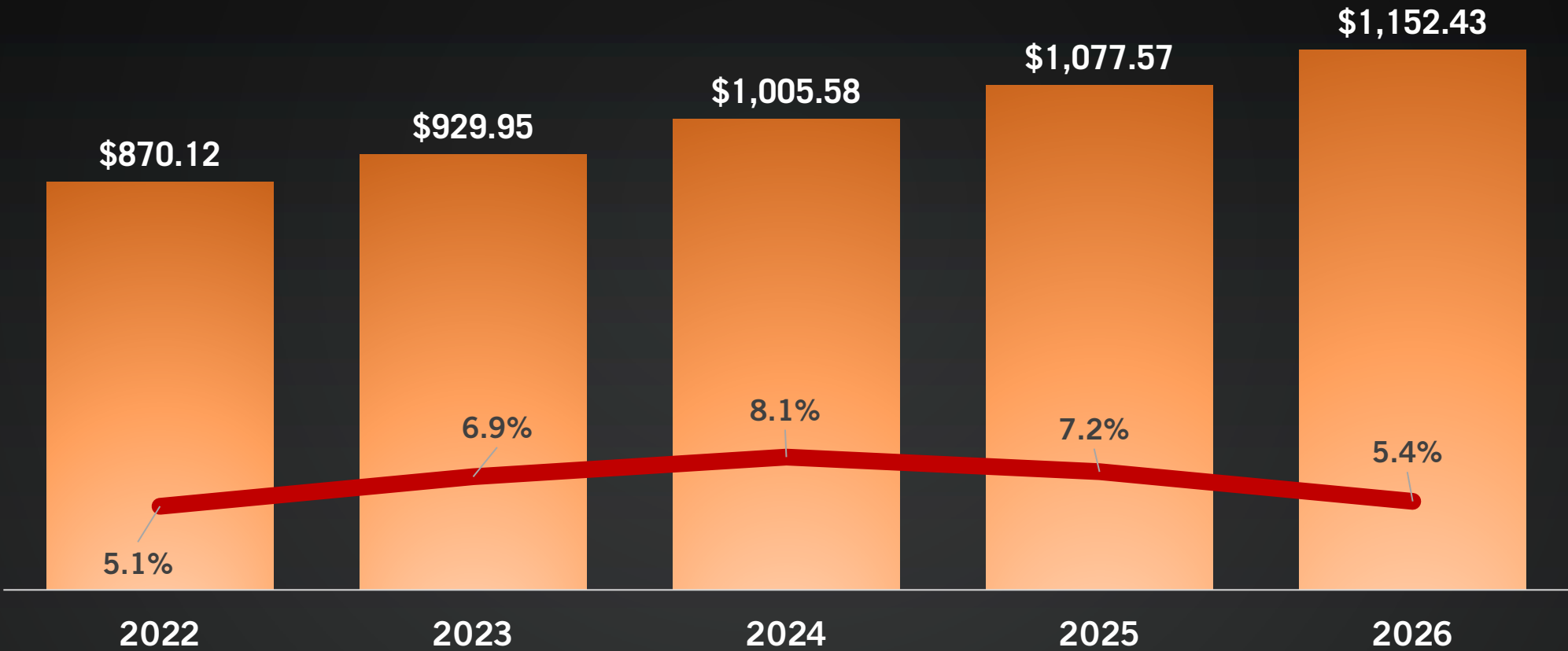
B4H

BrandsForHumans

Media Landscape

Total Media Ad Spending

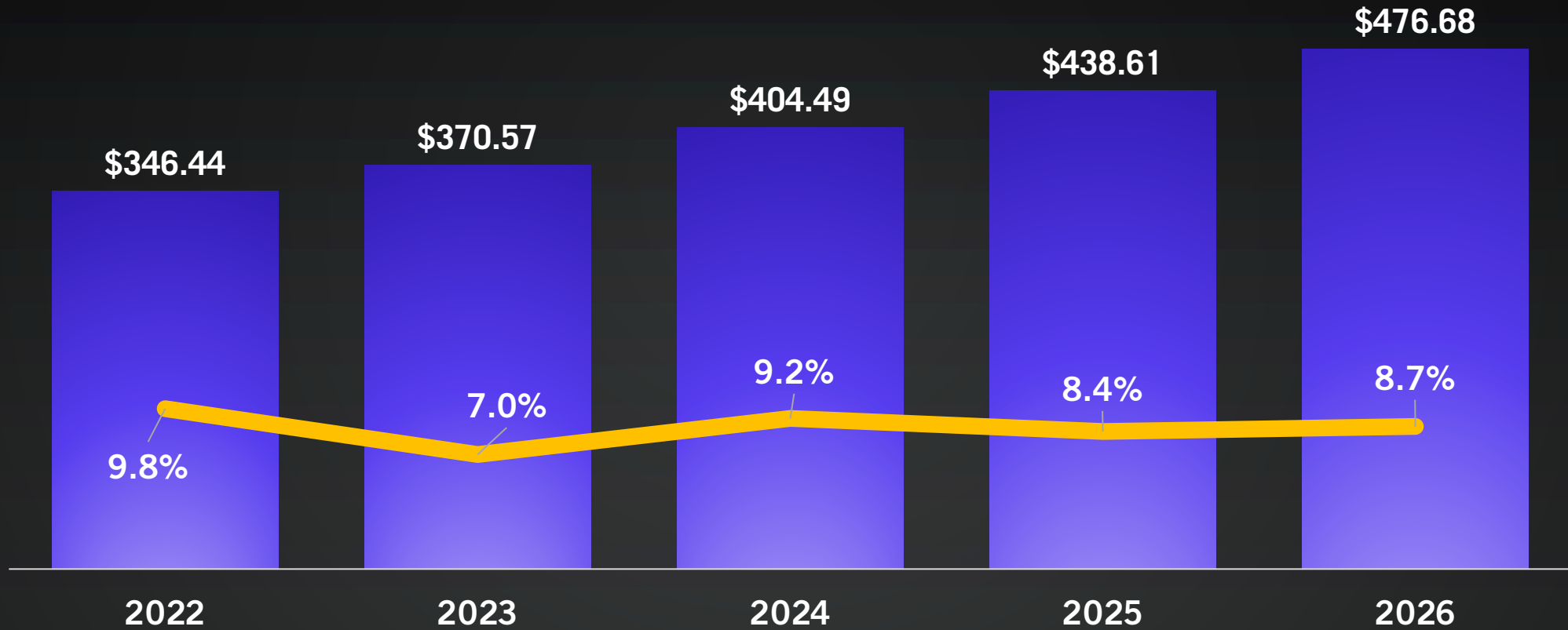
Worldwide 2022-2026 (billions)



Source: eMarketer Oct '22

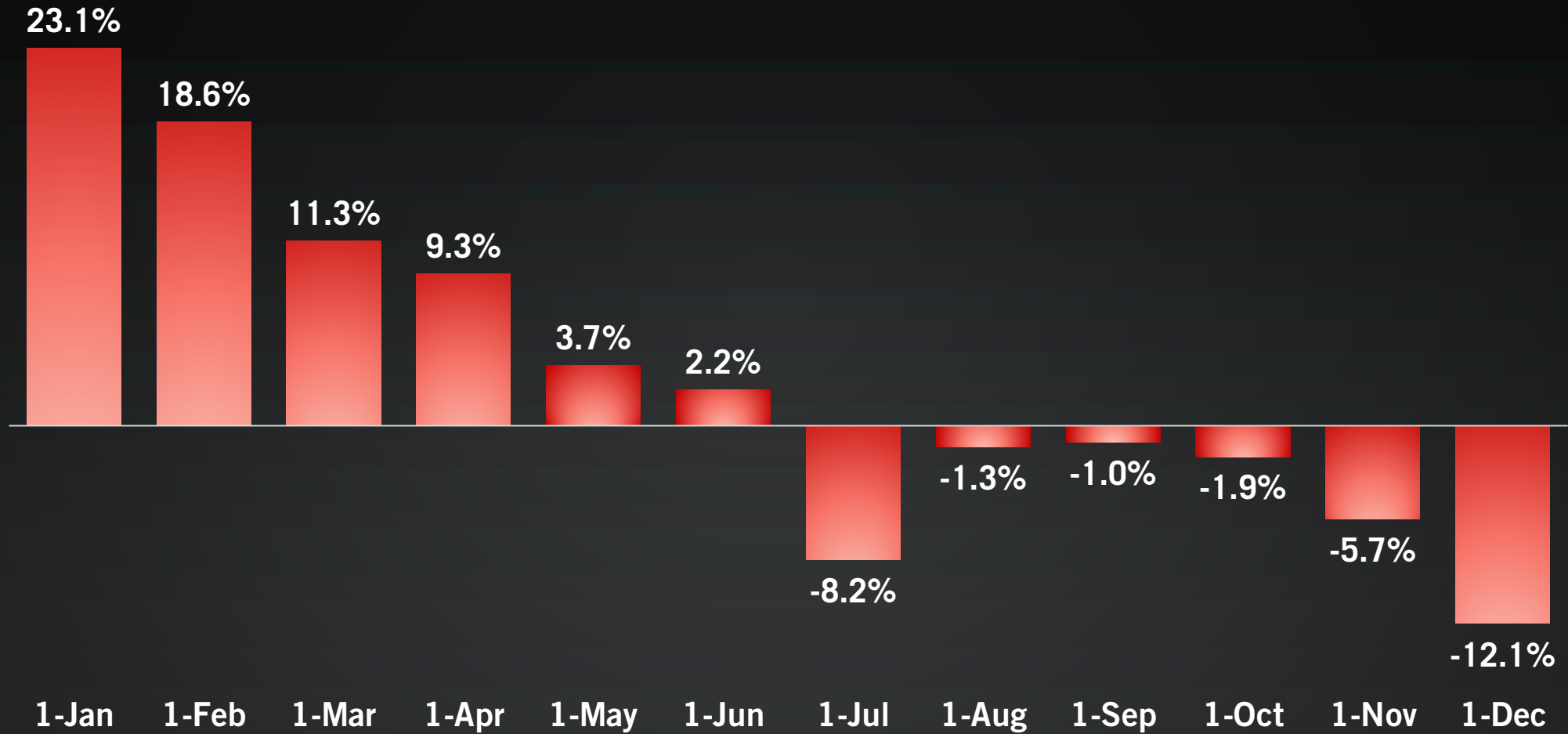
Total Media Ad Spending

U.S. 2022-2026 (billions)



Monthly Change in Ad Spending

U.S. Year-over-Year



Source: Standard Media Index's U.S. Ad Market Tracker

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

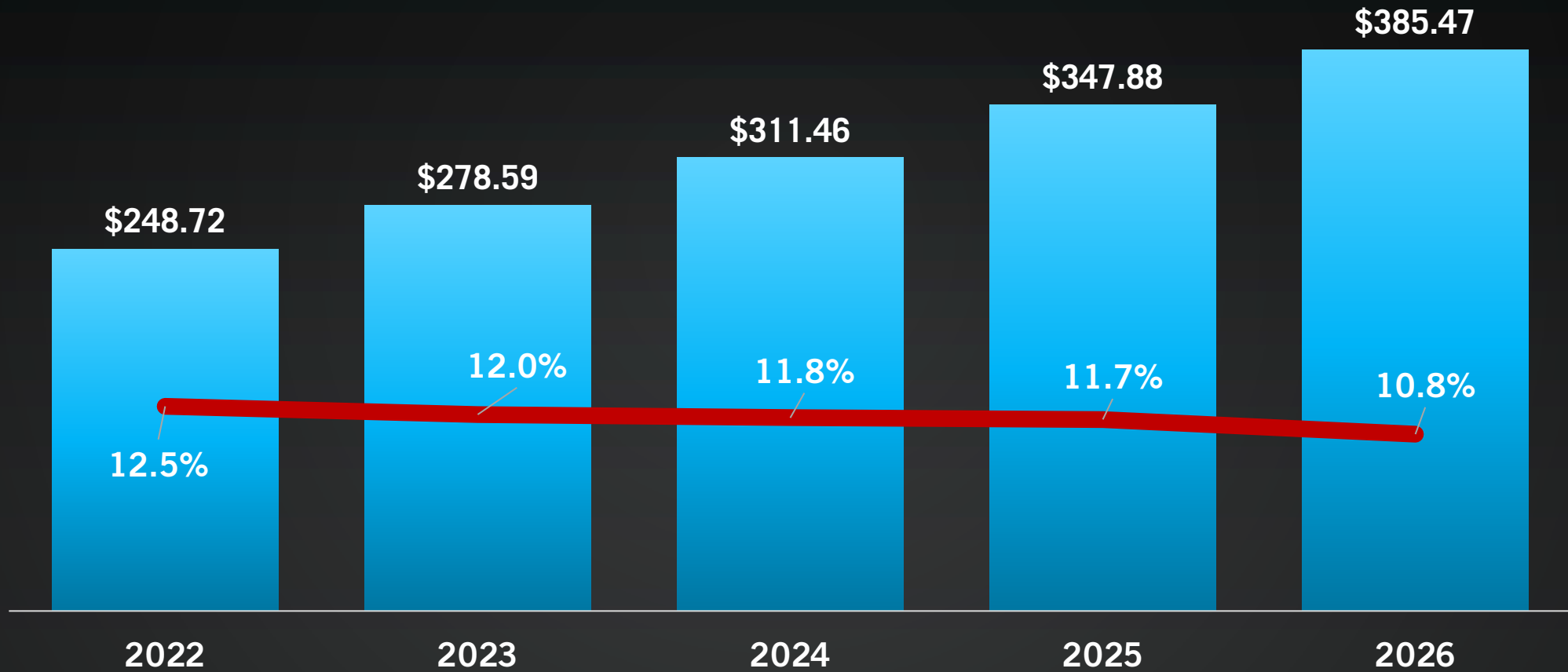
Total Media Ad Spending, by Media

U.S. 2022 (billions)



Digital Ad Spending

U.S. 2021-2025 (billions)





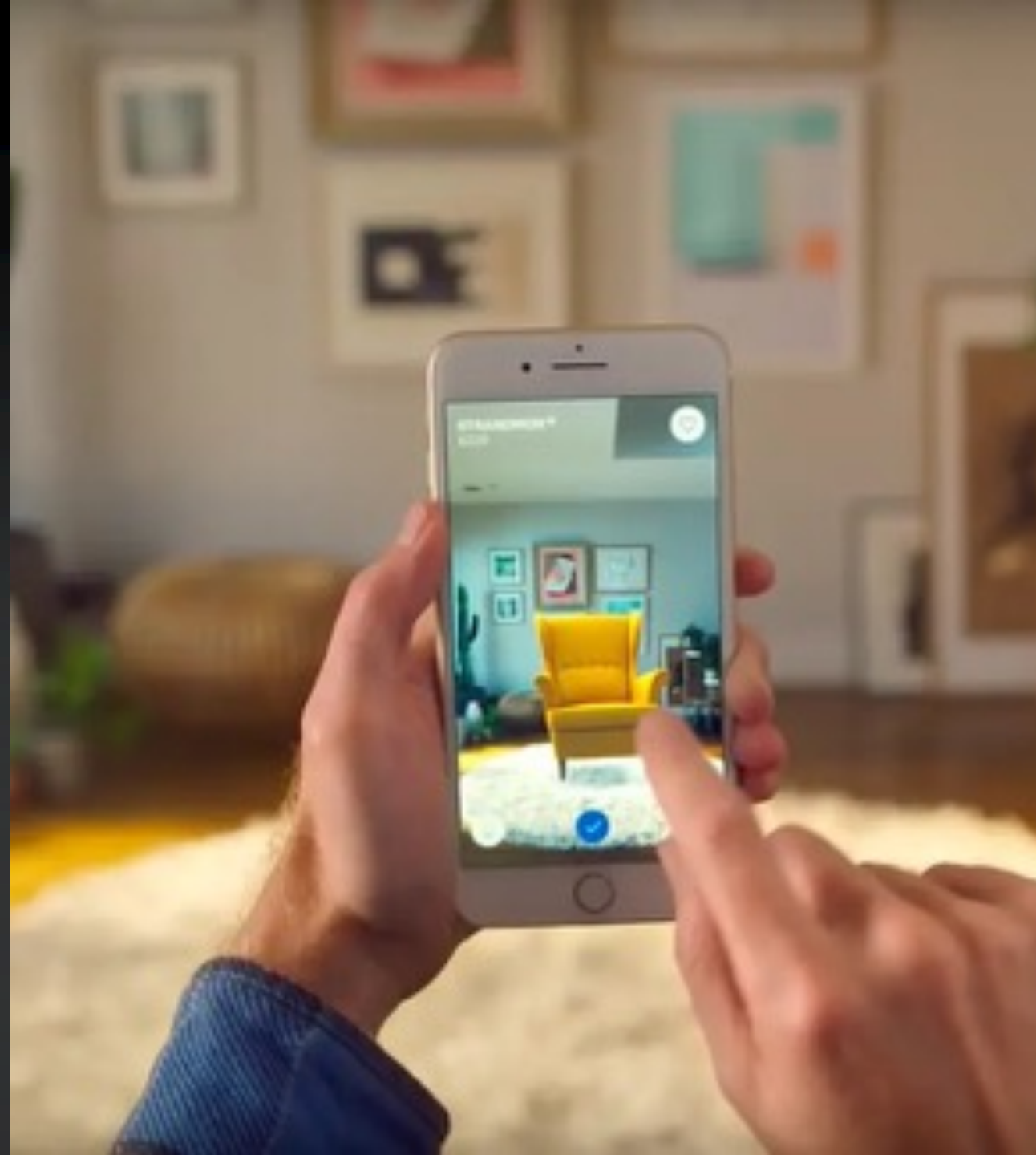
DIGITAL MARKETING TRENDS

- **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**



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

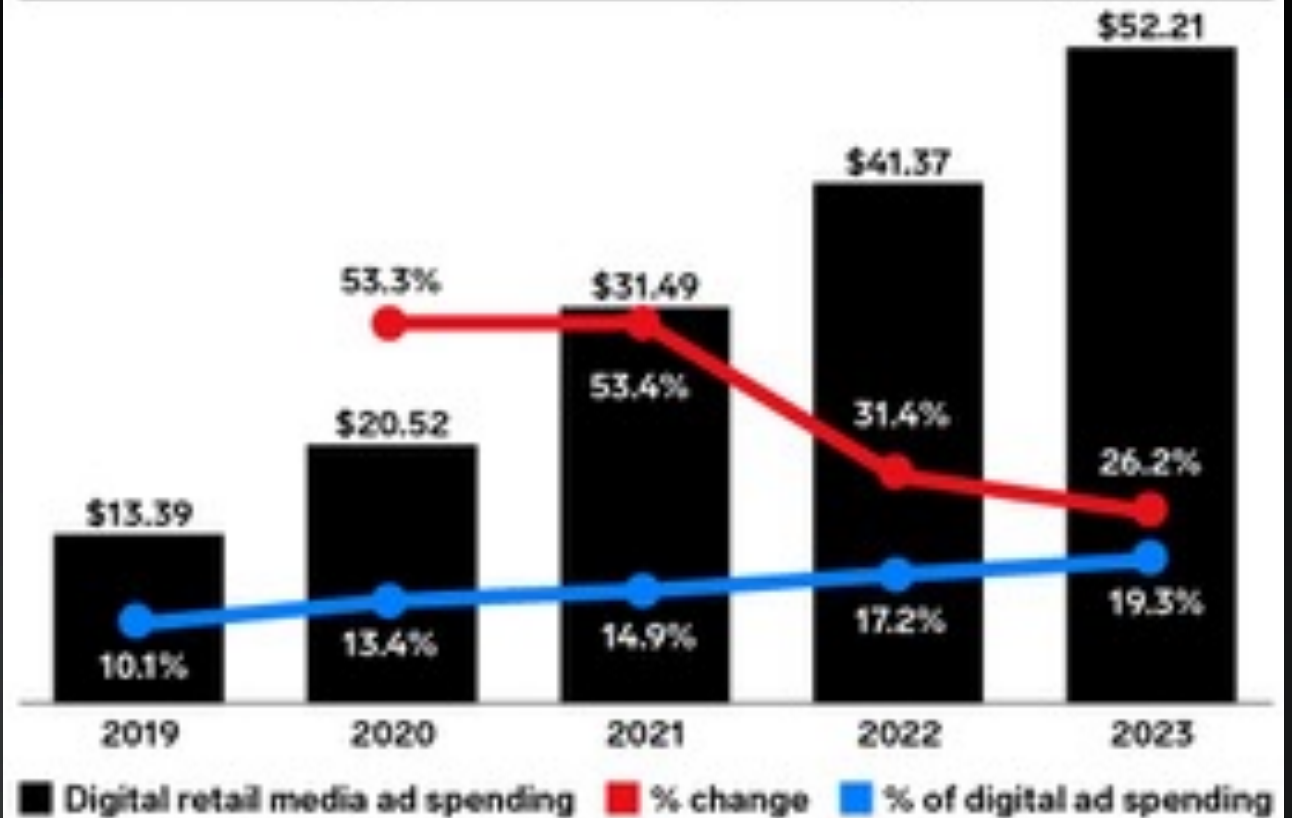


Retail Media Networks

\$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

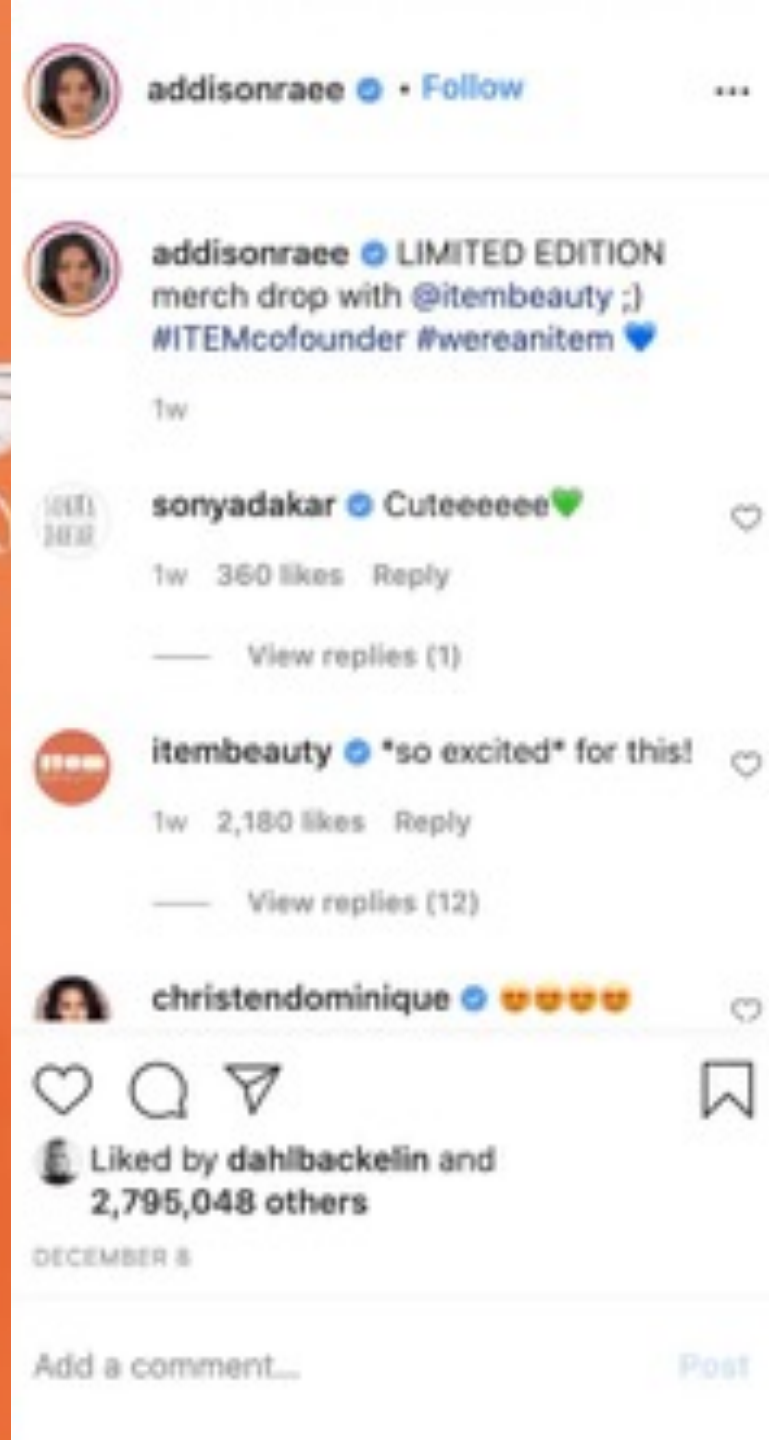
In just one day in October 2021, two of China's top live-streamers, Li Jiaqi and Viya, sold \$3 billion worth of goods – three times Amazon's average daily sales



Influencer Marketing

\$13.8B global
\$4B in U.S.

Projected \$25B
by 2025





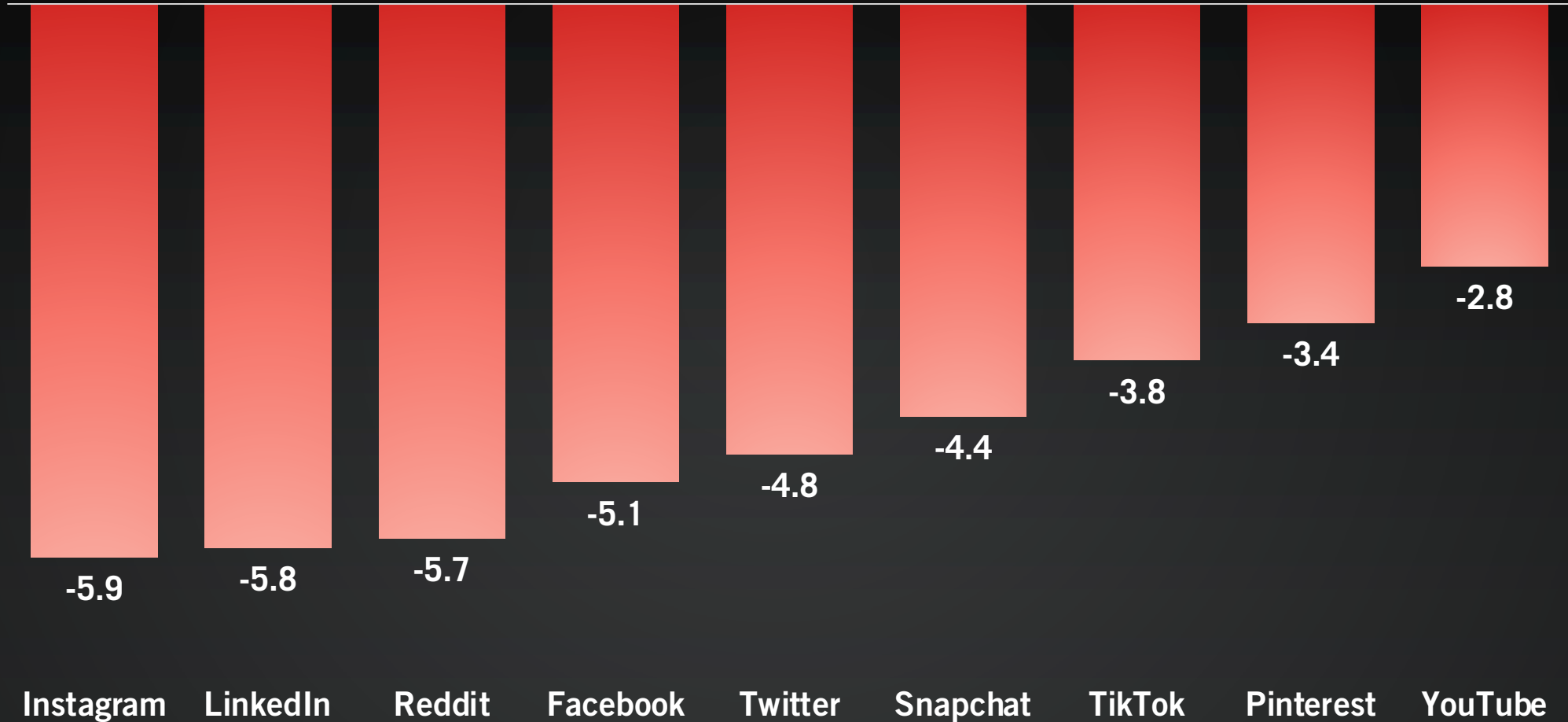
CONNECTED TV

- **2/3 of consumers will continue to shift to CTV from traditional**
- **2023 forecast is \$27 billion**
- **Ad Fraud represents a huge concern**

The Power of AI ChatGPT

Trust in Social Platforms

Change in total benchmark score versus 2021



Source: Insider Intelligence "U.S. Digital Trust Benchmark 2022" (Sept 22)



INDUSTRY HEADWINDS

- **Measurement and Accountability**
- **Programmatic Media Transparency**
- **Privacy and Addressability**
- **Talent Shortage**
- **Fraud**
- **Brand Safety**

Message From ANA Board Of Directors:

**IT'S TIME TO
TAKE OUR INDUSTRY BACK...
AND DRIVE GROWTH!!**

ANA MISSION

**DRIVING
GROWTH**

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

ANA GROWTH AGENDA



Growth Deceleration

Fortune 500
Average Annual Rate of Growth

2000-2010

4.0%

2010-2015

2.0%

2015-2020

2.8%

Each **percentage point**
of growth
adds **\$150 billion** annually
to the Fortune 500

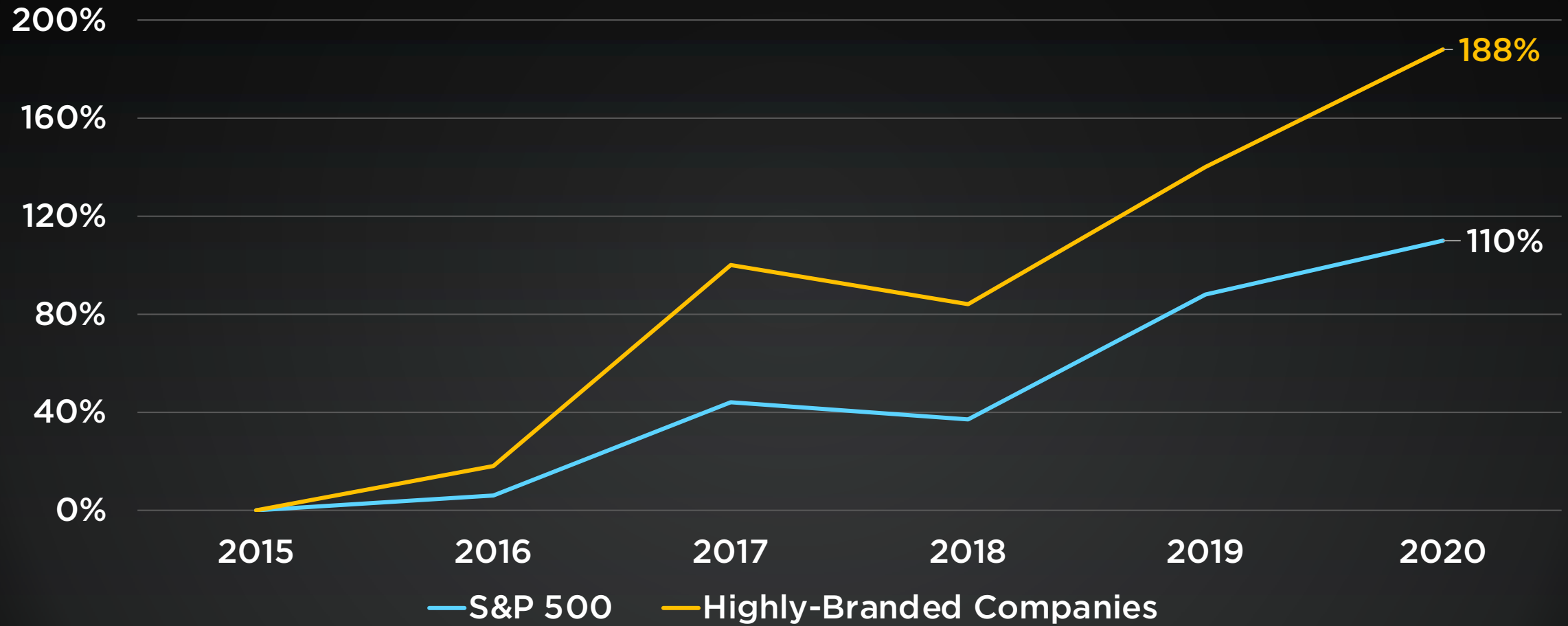
Making Media More Productive **DRIVES GROWTH**



ANA 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**

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



Source: Brand Finance

Accurate Measurement **DRIVES GROWTH**



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**

**A Well-Trained
Workforce
DRIVES GROWTH**





**Marketing
Training &
Development
Center**

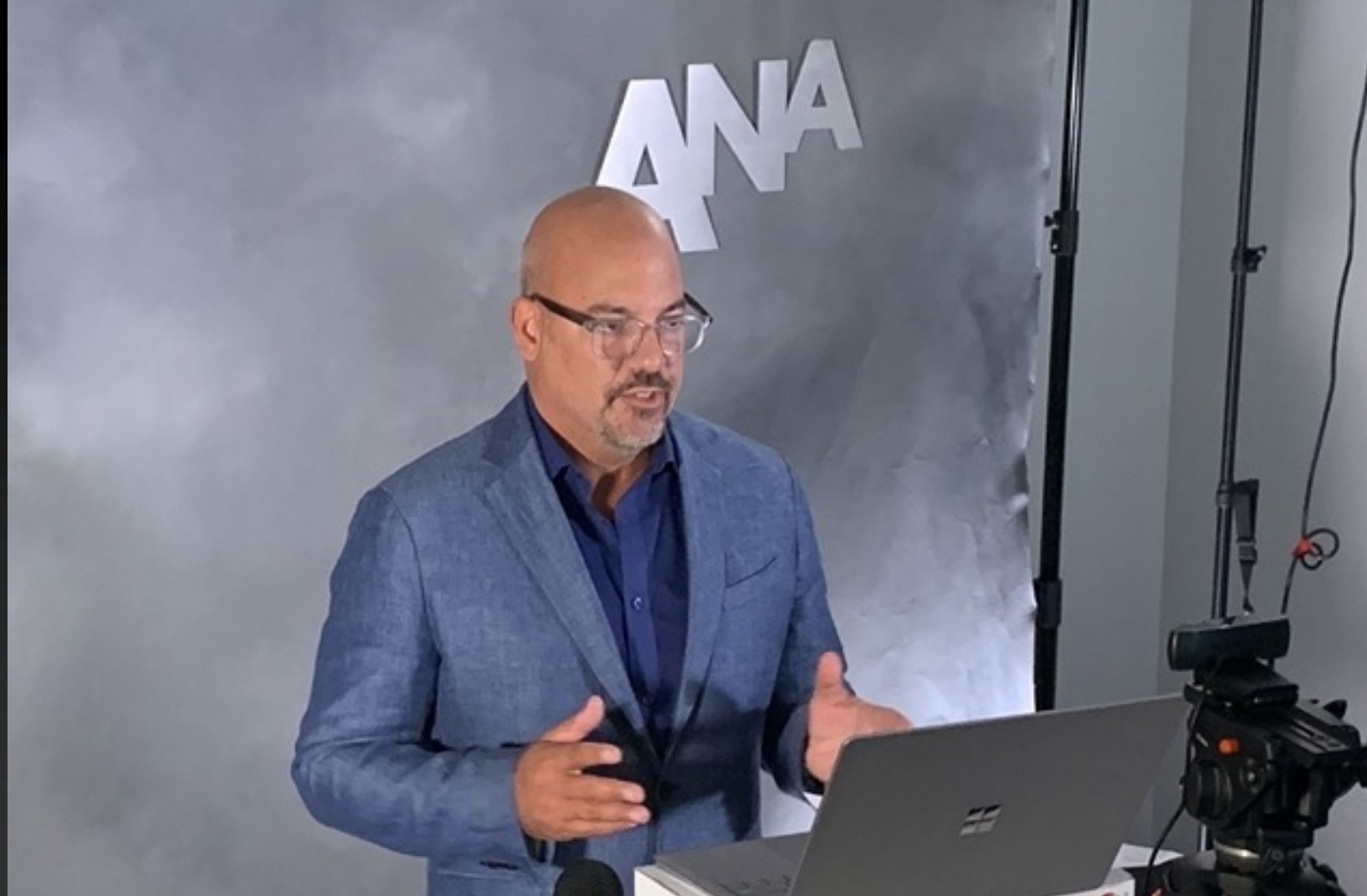


**THE ANA
EDUCATIONAL
FOUNDATION**



**Institute
for Real
Growth**

ANA's Global Day of Learning



CMO
GROWTH COUNCIL

ANA CANNES
LIONS

RESET
REBOOT
REOPEN

MARKETING'S GLOBAL DAY OF LEARNING



**Diversity, Equity,
and Inclusion
DRIVES GROWTH**



ANA BUSINESS ENTERPRISES



200 Member Companies



100 Universities



100 Member Companies

SEEHER

ANA

Accurate
Portrayal
of Women
in Ads





ANA

AIMM

ALLIANCE FOR INCLUSIVE AND
MULTICULTURAL MARKETING



**AND NOW A WORD FROM
THE DIVERSE SUPPLIERS:
THE SUPPLIER
PERSPECTIVE ON
CERTIFICATION**

MORE IN A PORTFOLIO OF ANA WORK ON SUPPLIER DIVERSITY

DECEMBER 2021





VIRTUAL SUPPLIER DIVERSITY FAIR

MEET MINORITY SMALL BUSINESS COMPANIES

TUESDAY, OCTOBER 4, 2022

● FEATURED PARTICIPANTS ●

ANA





#SeeALL

Sustainability
DRIVES GROWTH



AD
NET
ZER 

ALL FOR NONE

ANA GROWTH AGENDA





HUMANITY FOR GROWTH

ANA

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ANA Media Conference

Bob Liodice
CEO

