



2023

ANA Advertising Financial Management Conference

presented by dentsu

Bob Liodice
CEO





“Marketing magic exists
between consumer truth
and product truth.

Define and discover **the
authentic role** your products
play in people’s lives.”

Soyong Kang
CMO, eos



“Brands are in a position
to **drive change**
not only within their
organizations
but **in society at large.**”

CMOs need to
take the lead.”

verizon✓

Tony Wells
Chief Media Officer, Verizon





Be a force
for **good...**
and a force
for **growth.**

MARC PRITCHARD
ANA Chairman & Chief Brand Officer

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
\$500 billion
annually to our Industry

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



Headwinds

S&P GLOBAL RATINGS

U.S. MACROECONOMIC FORECAST

(year % change)	2023f	2024e	2025e
Real GDP	0.7	1.2	1.8
Real consumer spending	1.2	0.9	1.8
Core CPI	4.7	3.0	1.9
Unemployment rate	4.1	5.0	5.1

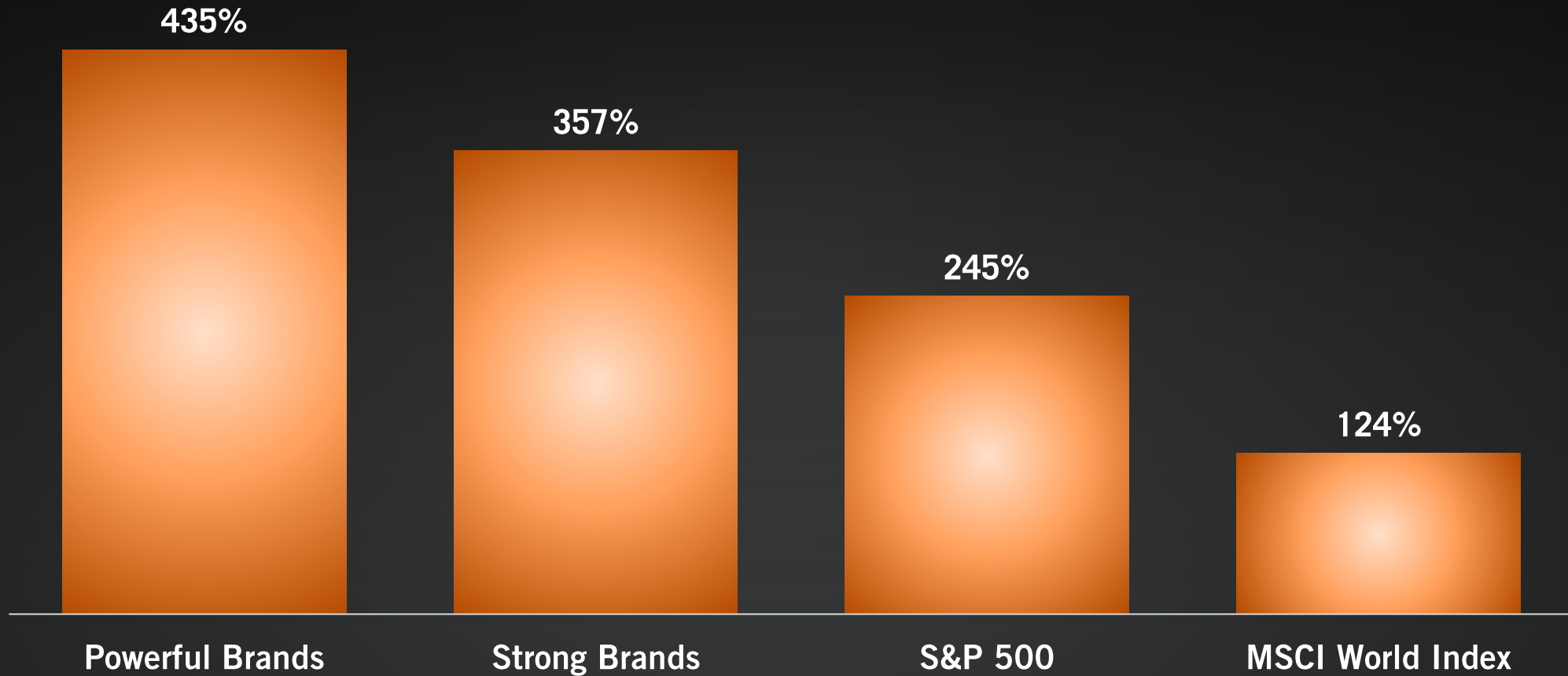
Source: Economic Outlook U.S. Q2 2023: Still Resilient, Downside Risks Rise, March 27, 2023.

Activating Brands DRIVES GROWTH

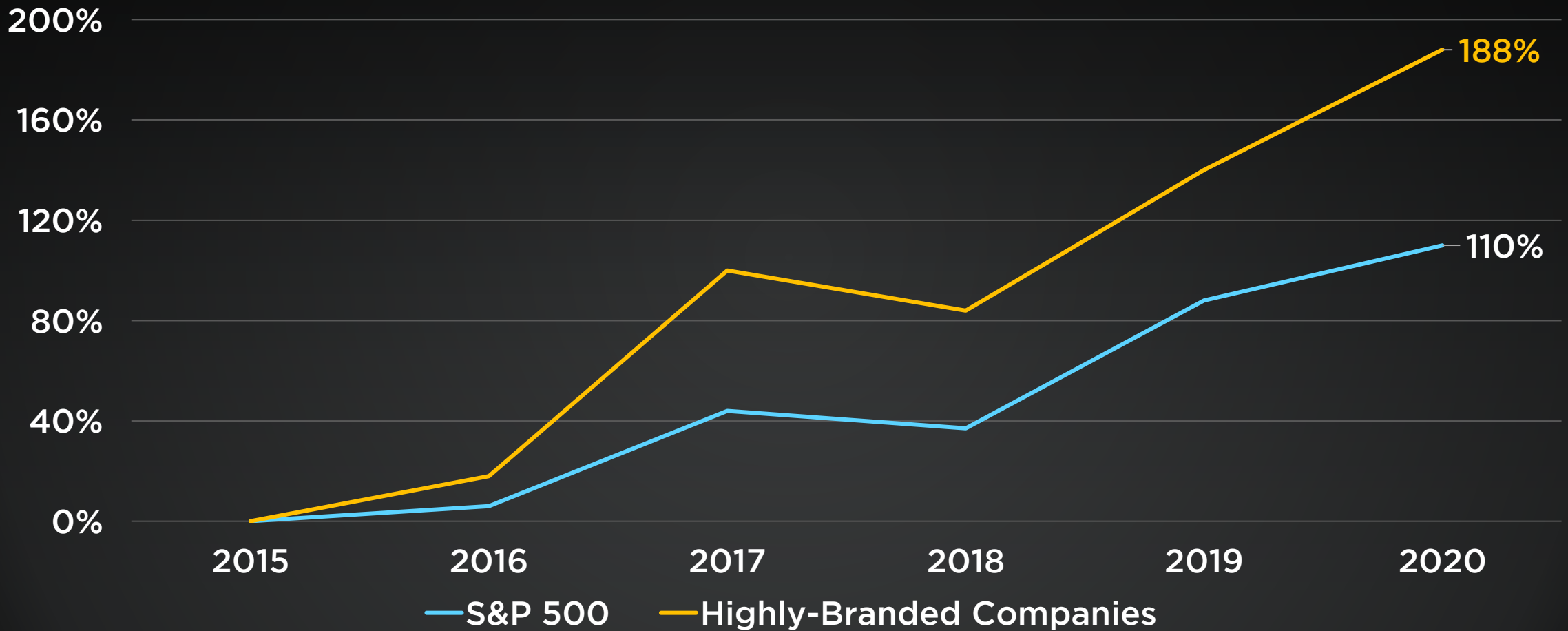


Strong Brands = Superior Returns

2006-2022



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



Source: Brand Finance



Driving Brand Growth Is COMPLEX

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

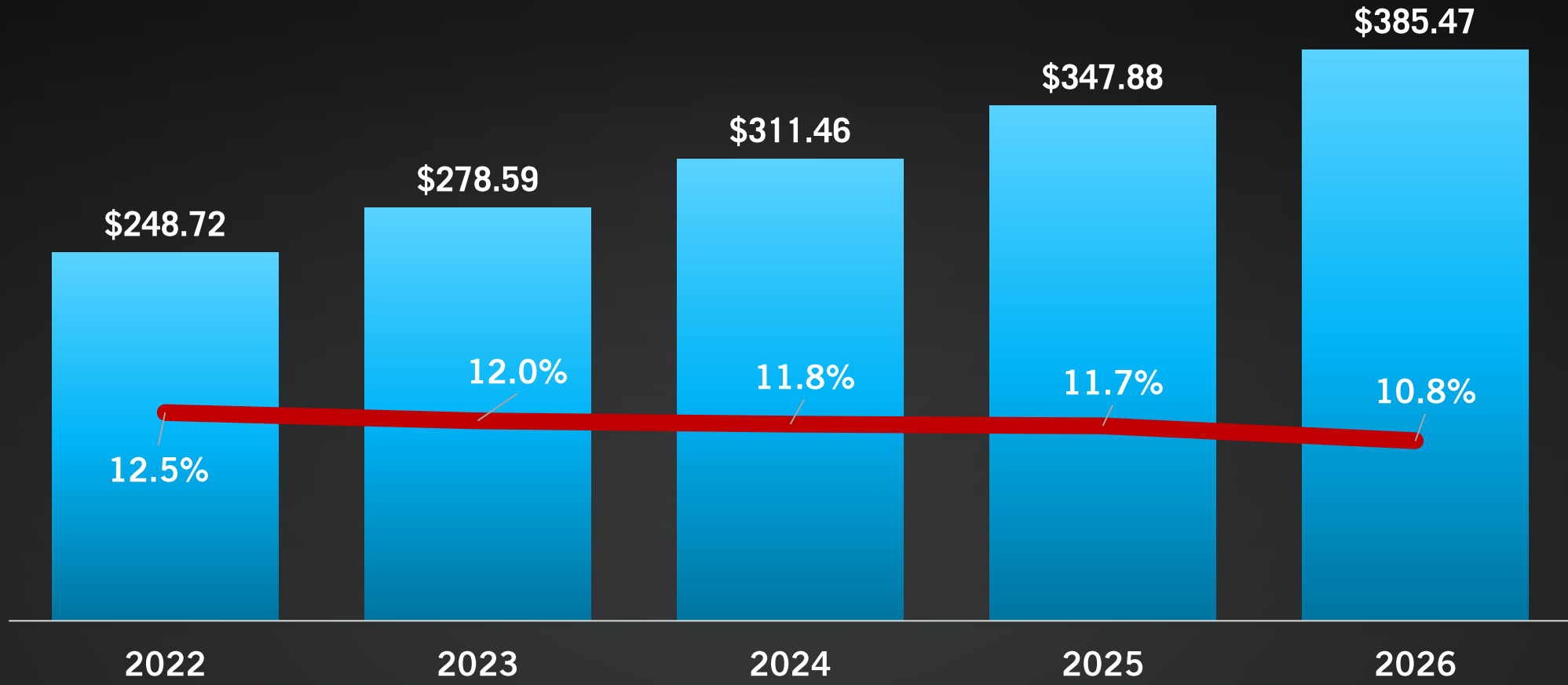
UNLOCKING BRAND GROWTH

- **Media Excellence**
- **Data and Analytics Superiority**
- **Growth in Measurement Capability**
- **Leveraging Technology**
- **Outstanding Talent**
- **Advancing DEIB**

**Digital Media
Excellence
Drives Growth**

Digital Ad Spending

U.S. 2022-2026 (billions)



Source: eMarketer Oct '22



DIGITAL MARKETING TRENDS

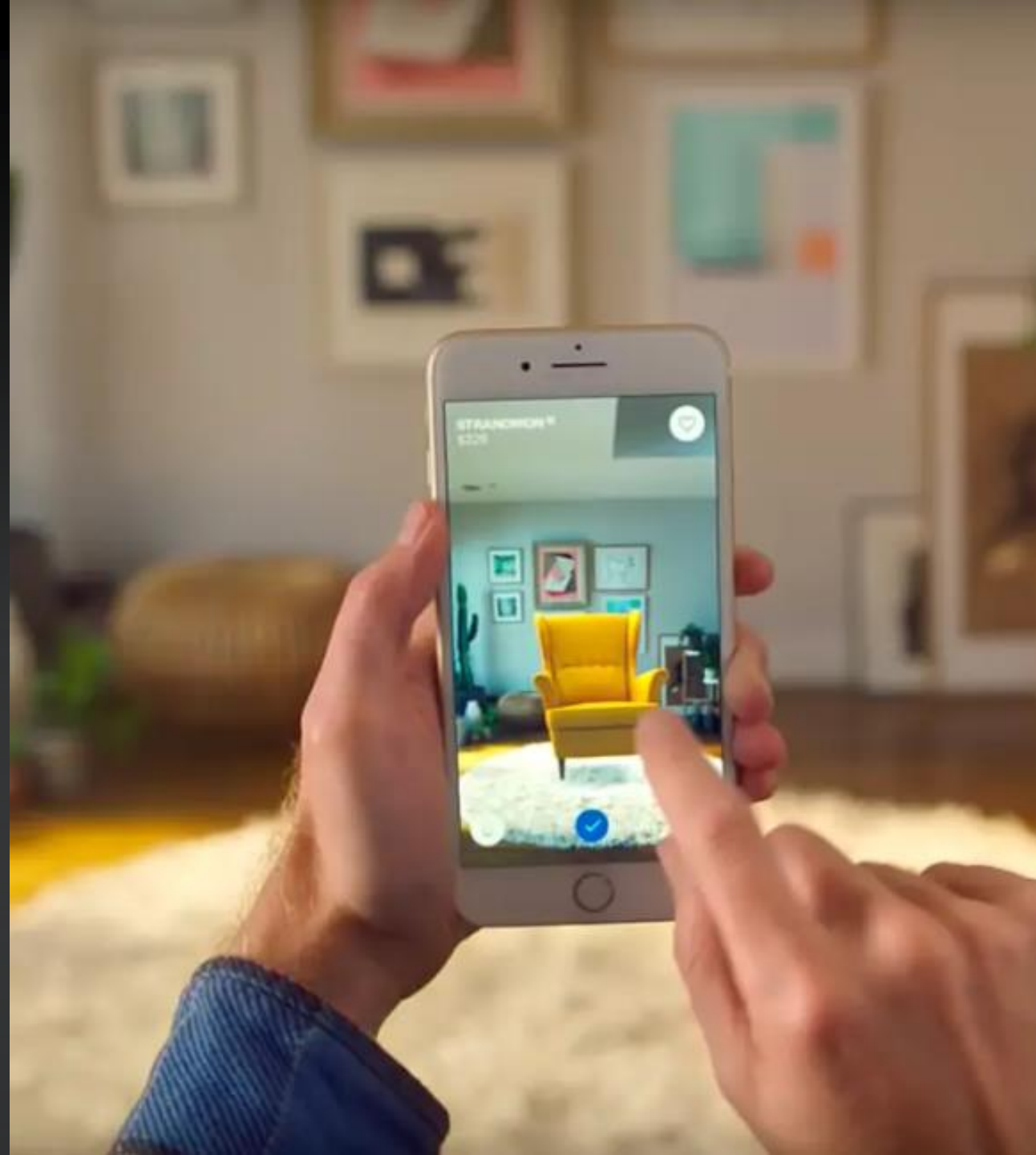
- **Influencer marketing takes center stage**
- **TikTok advances viral commerce**
- **Personalization delivers customized experiences**
- **AI/Metaverse are here to stay**
- **Long-form video content consumes more screen time**

**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+

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

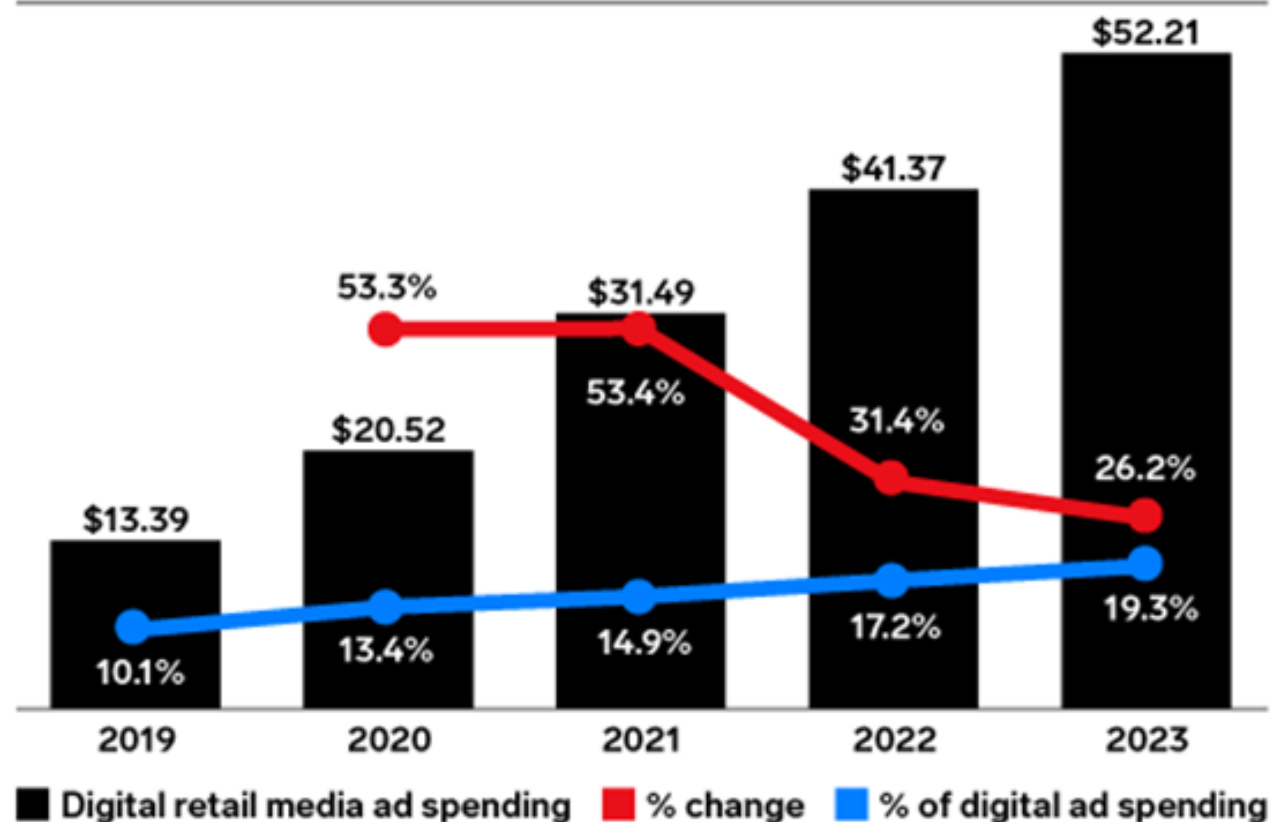


Retail Media Networks

\$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


Influencer Marketing

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


Projected \$25B
by 2025



 **addisonraee** • Follow


 **addisonraee** LIMITED EDITION merch drop with @itembeauty ;) #ITEMcofounder #wereanitem ❤️

1w

 **sonyadakar** Cuteeeeeee ❤️


1w 360 likes Reply

— View replies (1)


 **itembeauty** *so excited* for this! ❤️

1w 2,180 likes Reply

— View replies (12)

 **christendominique** 🥰🥰🥰🥰

👍 🗨️ 📍 🏷️

 Liked by dahlbackelin and 2,795,048 others

DECEMBER 8

Add a comment... Post



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



The New York Times

A.I. and Chatbots > Become an A.I. Expert | How Chatbots Work | Why Chatbots 'Hallucinate' | How to Use Chatbots

THE SHIFT

GPT-4 Is Exciting and Scary

Today, the new language model from OpenAI may be more exciting than that dangerous. But the worst risks are the ones we cannot anticipate.

The Telegraph

Why a fake Pope picture could be a warning of humanity

Silicon Valley heavyweights clash over the risks of super-powered AI

PRACTICAL INSIGHTS

How CMOs Can Lead the Way on ChatGPT

The Washington Post
Democracy Dies in Darkness
WORK: REIMAGINED

Quiz: Did AI make this? Test your knowledge.

Try to correctly identify whether AI did work tasks like producing images, articles and...

FORTUNE

TECH · A.I.

Bill Gates says the 'age of AI' will either reduce inequity or...

THE WALL STREET JOURNAL.

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The Jobs Most Exposed to ChatGPT

New study finds that AI tools could more quickly handle at least half of the tasks that auditors, interpreters and writers do now



AdAge

WHY CHATGPT CAN'T SAVE MARKETING—OR MARKETERS

...of shiny objects

Data Analytics **DRIVES GROWTH**



DATA AND ANALYTICS

- **Investments in data analytics grew 37% last year**
- **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

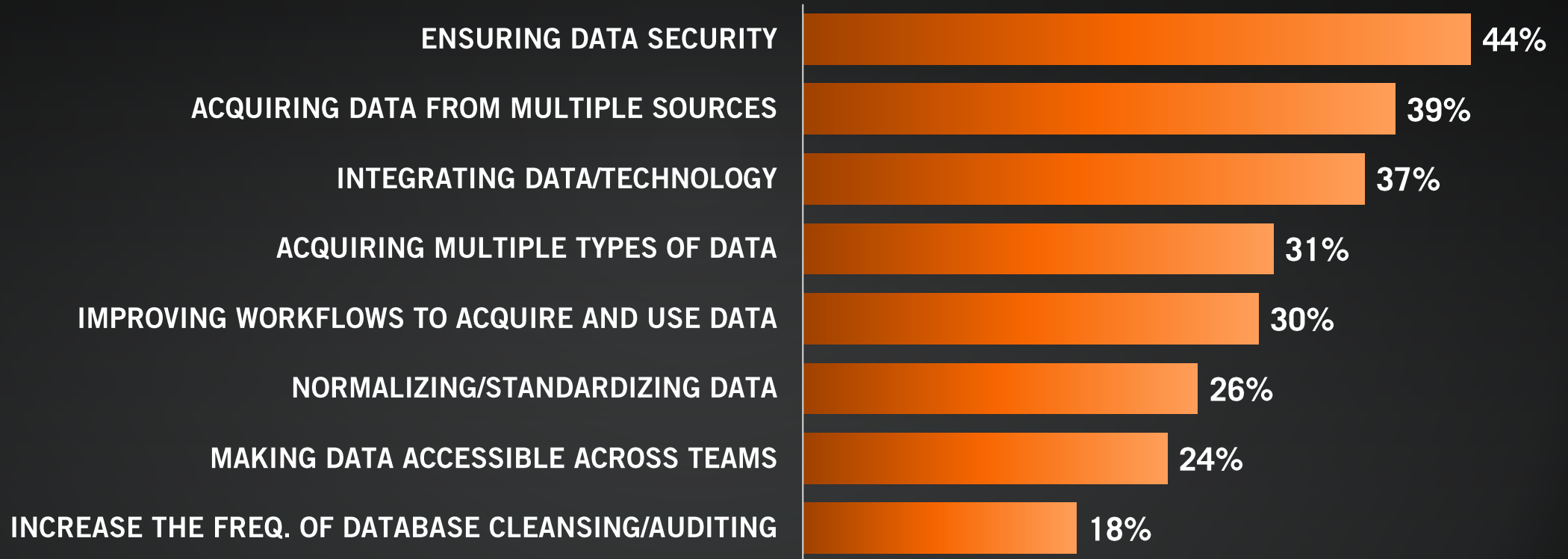
**Accurate
Measurement
Drives Growth**

MARKETING DATA QUALITY

47%

of marketing professionals
feel that the quality of
their marketing data
allows them to make
effective decisions on
where to spend resources

CRITICAL ELEMENTS TO IMPROVE DATA QUALITY



**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

ANA Measurement Agenda

**Marketers
Must Own It**

**Privacy-Preserving
Technology
Drives Growth**



State of Data 2023

Data Clean Rooms & the Democratization of Data in the Privacy-Centric Ecosystem

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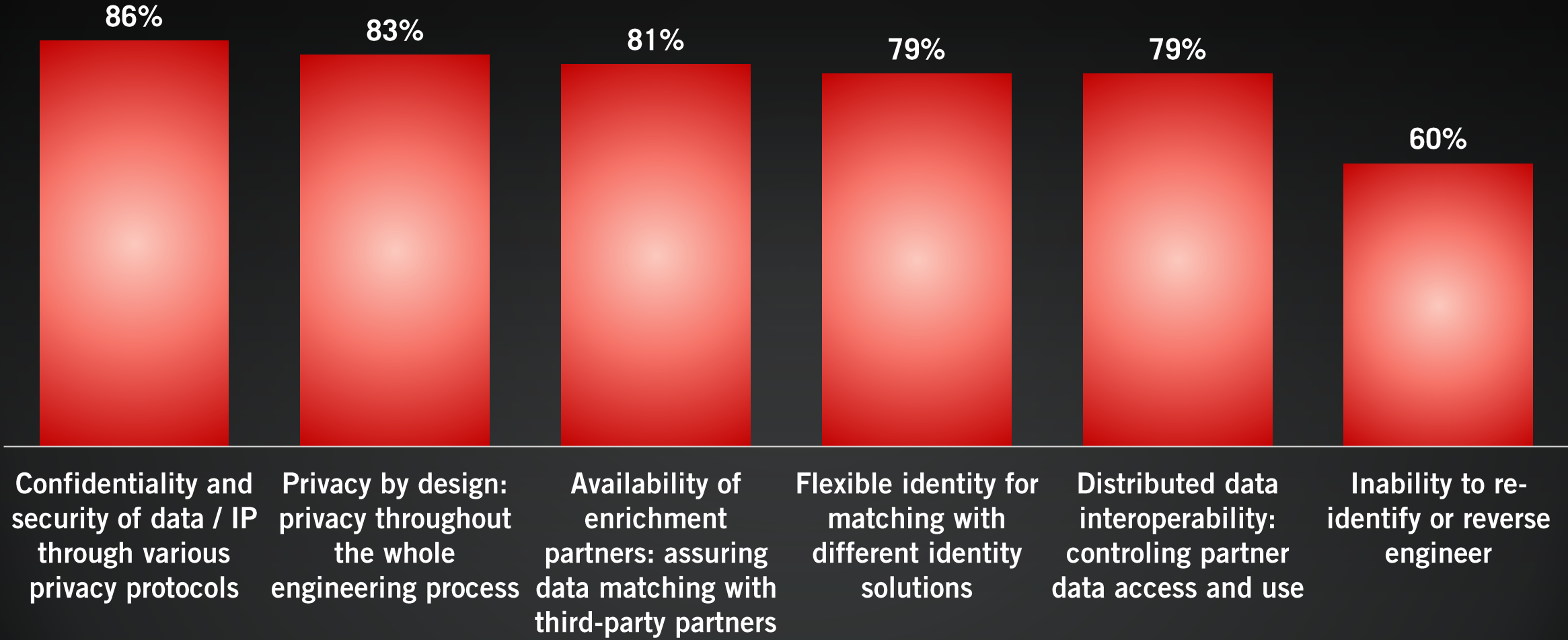
January 24, 2023



DATA CLEAN ROOMS

- **DCR's are an essential collaboration tool for audience insights, measurement and data activation in a privacy centric ecosystem**
- **Users are not using DCR's full potential**
- **DCR's require significant investments in talent, financial resources, data infrastructure and internal connectivity**

DCR USE CASES

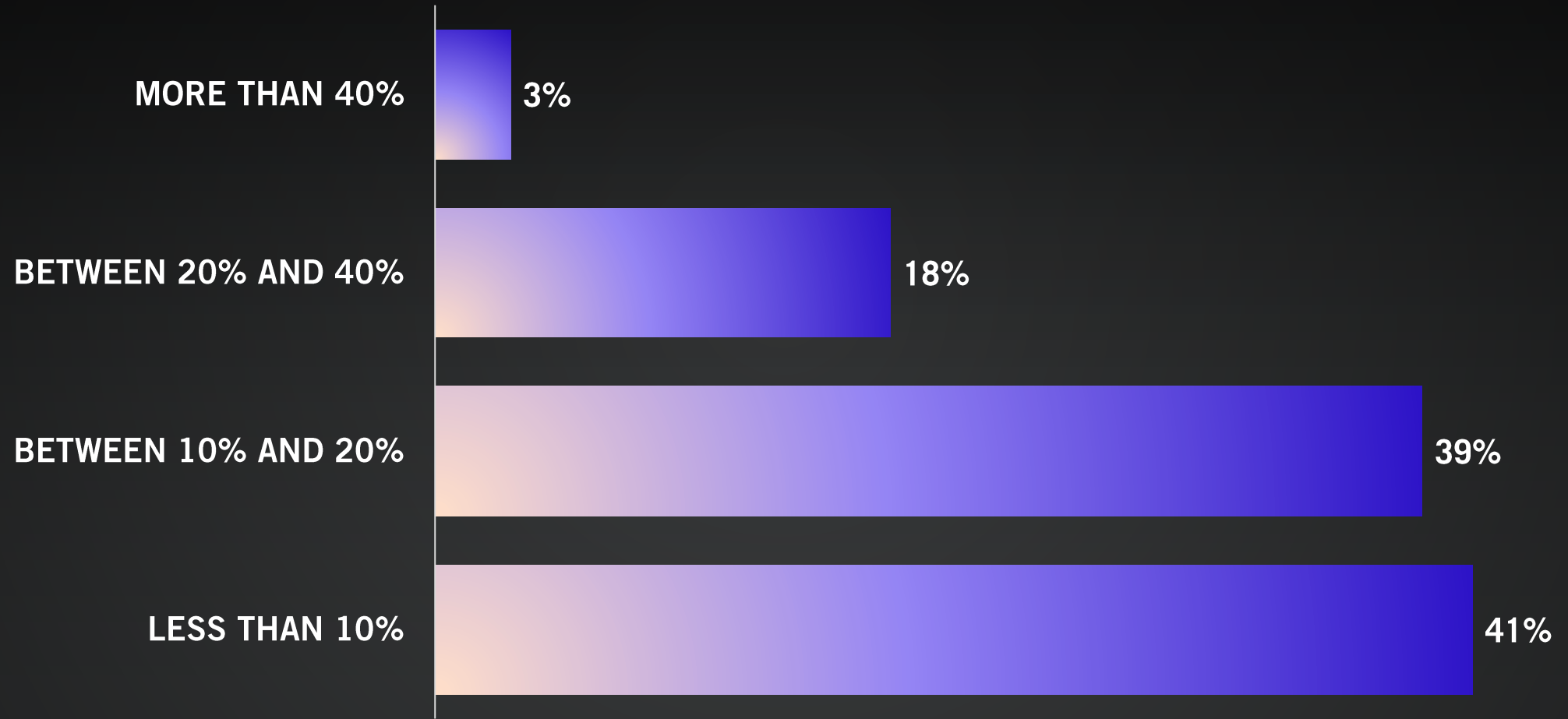


Source: IAB State of Data Report

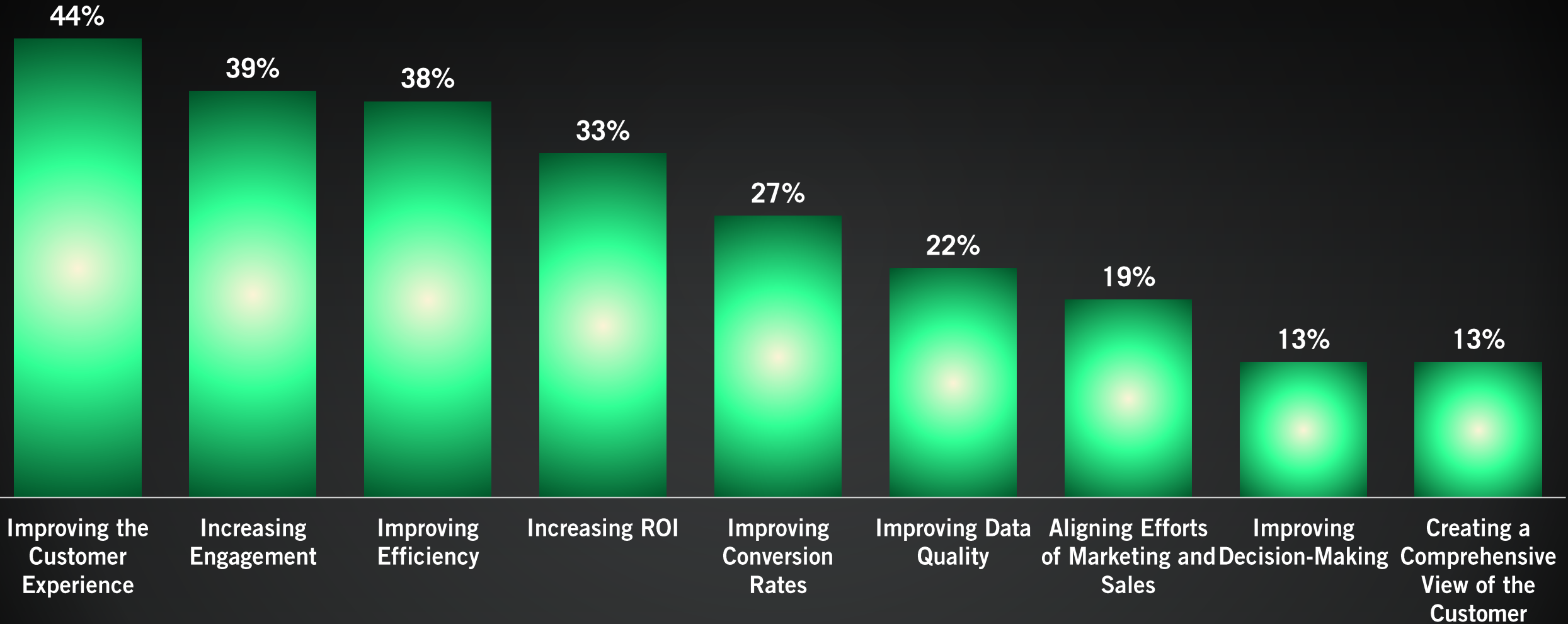
MarTech
Drives Growth

MARTECH BUDGETS

(% of Total Spend)



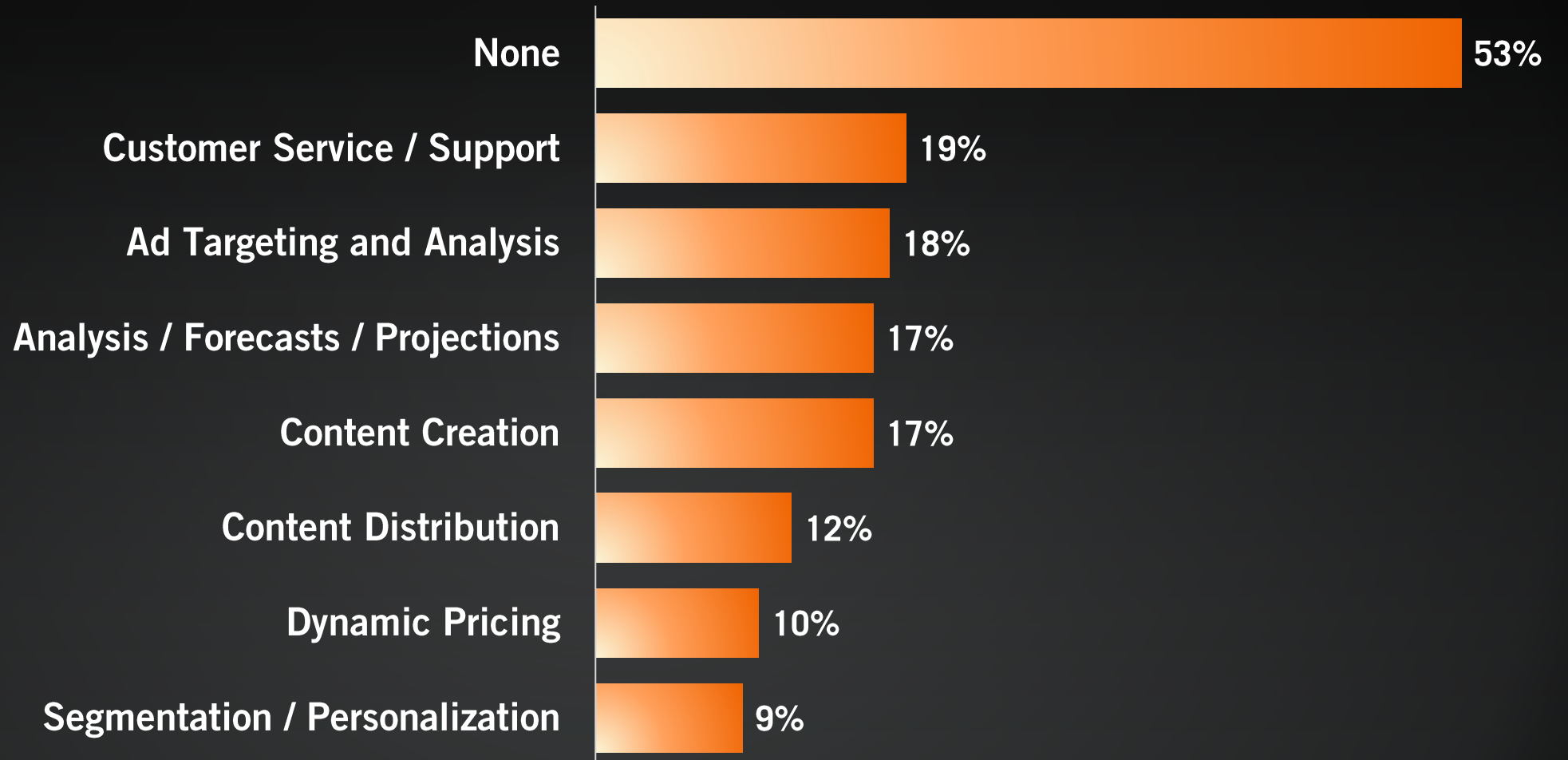
MARTECH GOALS / RATIONALE



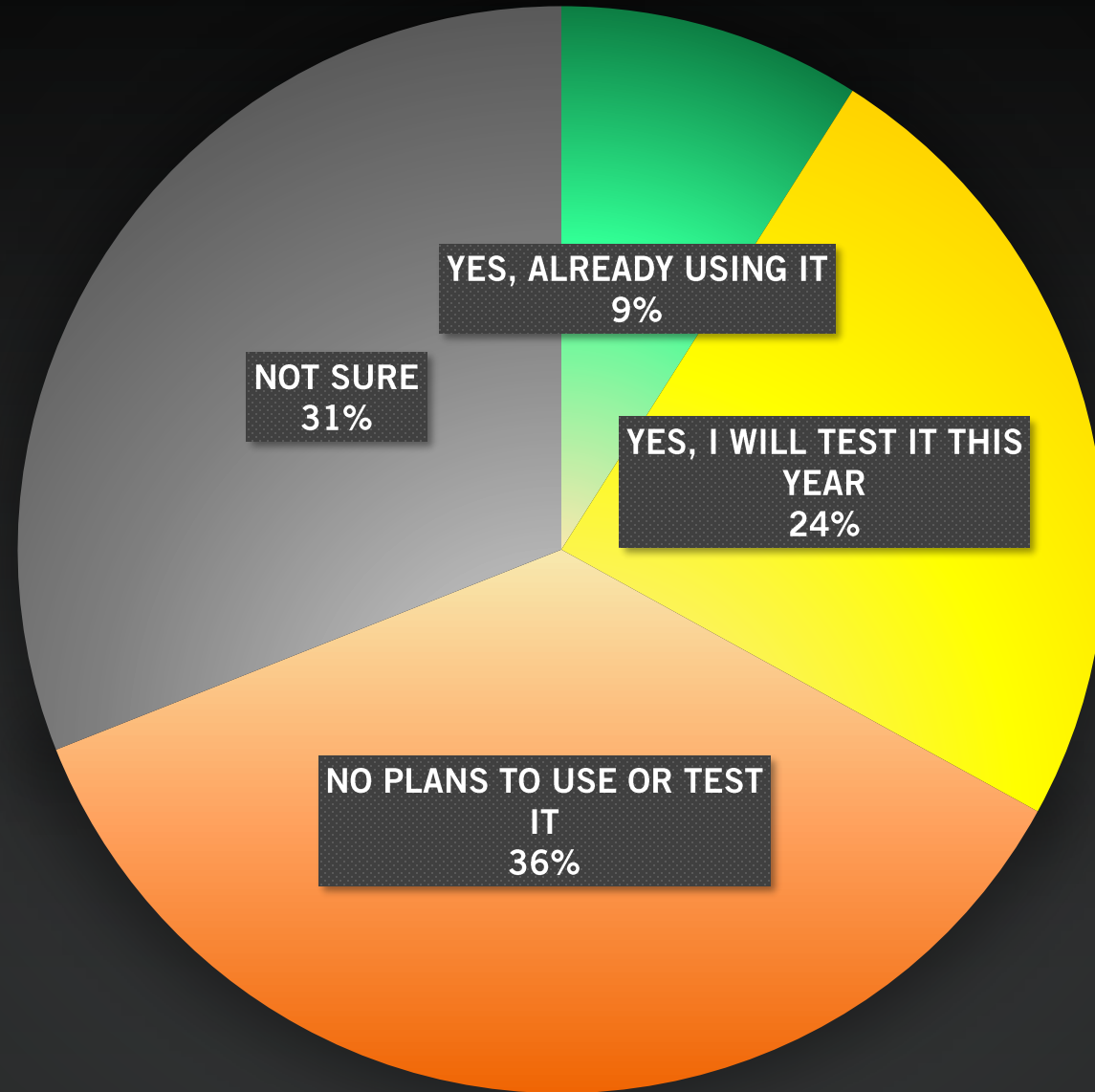
Source: Ascend 2

AI/ChatGPT
Drives Growth

THE USE OF A.I.



PLANS FOR USING CHATGPT



**A Well-Trained
Workforce
DRIVES GROWTH**





**Marketing
Training &
Development
Center**

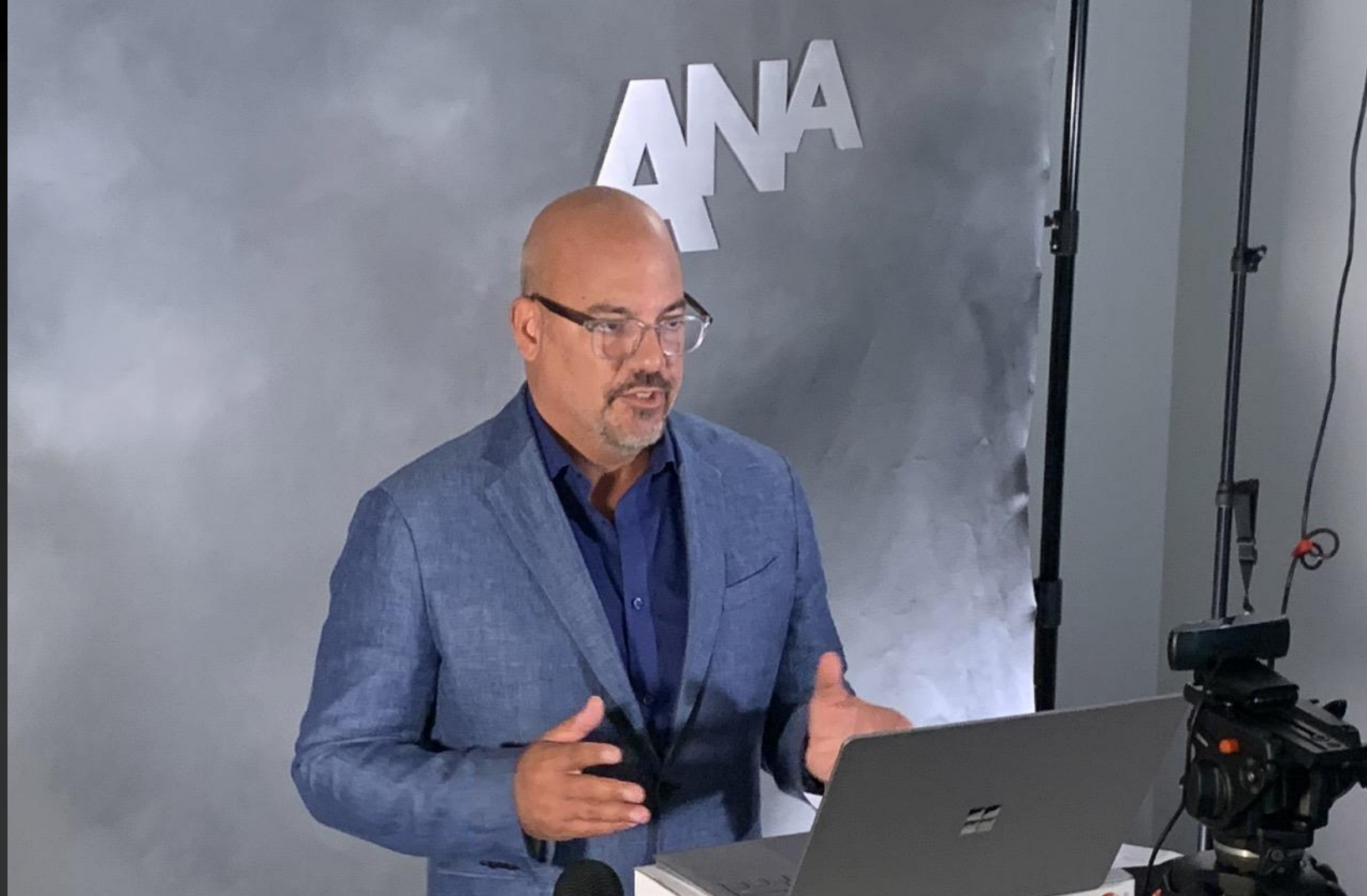


**THE ANA
EDUCATIONAL
FOUNDATION**



**Institute
for Real
Growth**

ANA's Global Day of Learning



CMO
GROWTH COUNCIL



RESET
REBOOT
REOPEN

MARKETING'S GLOBAL DAY OF LEARNING



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



SEEHER

ANA

Accurate
Portrayal
of Women
in Ads



ANA

AIMM

ALLIANCE FOR INCLUSIVE AND
MULTICULTURAL MARKETING



#SeeALL



**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**

Leadership
DRIVES GROWTH

ANA GROWTH AGENDA





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