

2023

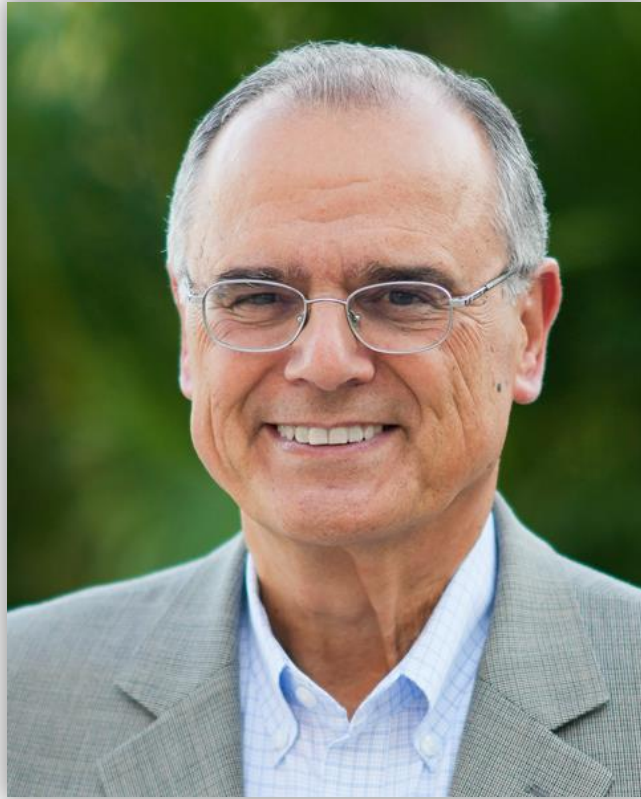
ANA Digital & Social Media Conference

presented by  **mntn**

JULY 17-19

ANA





BOB LIODICE
Chief Executive Officer
ANA

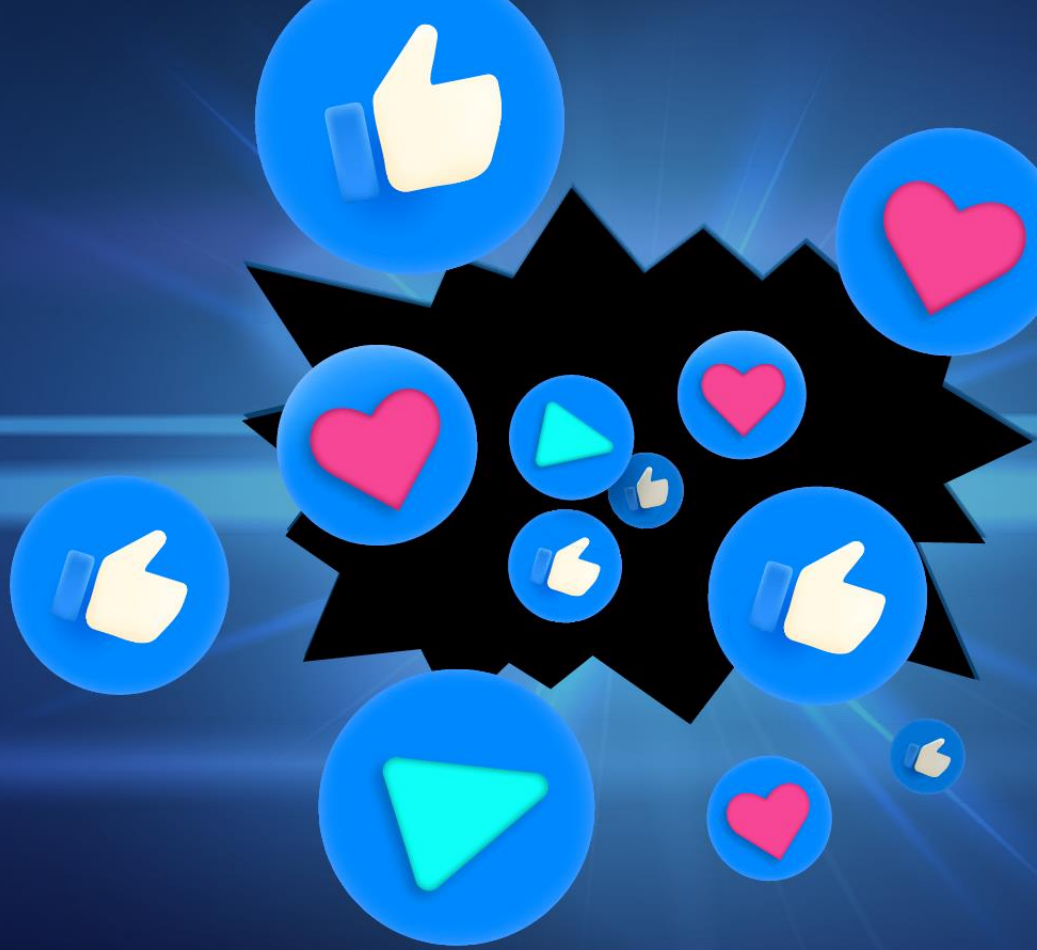
2023

ANA Digital & Social Media Conference

presented by  **mntn**

Bob Liodice
CEO

ANA



“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

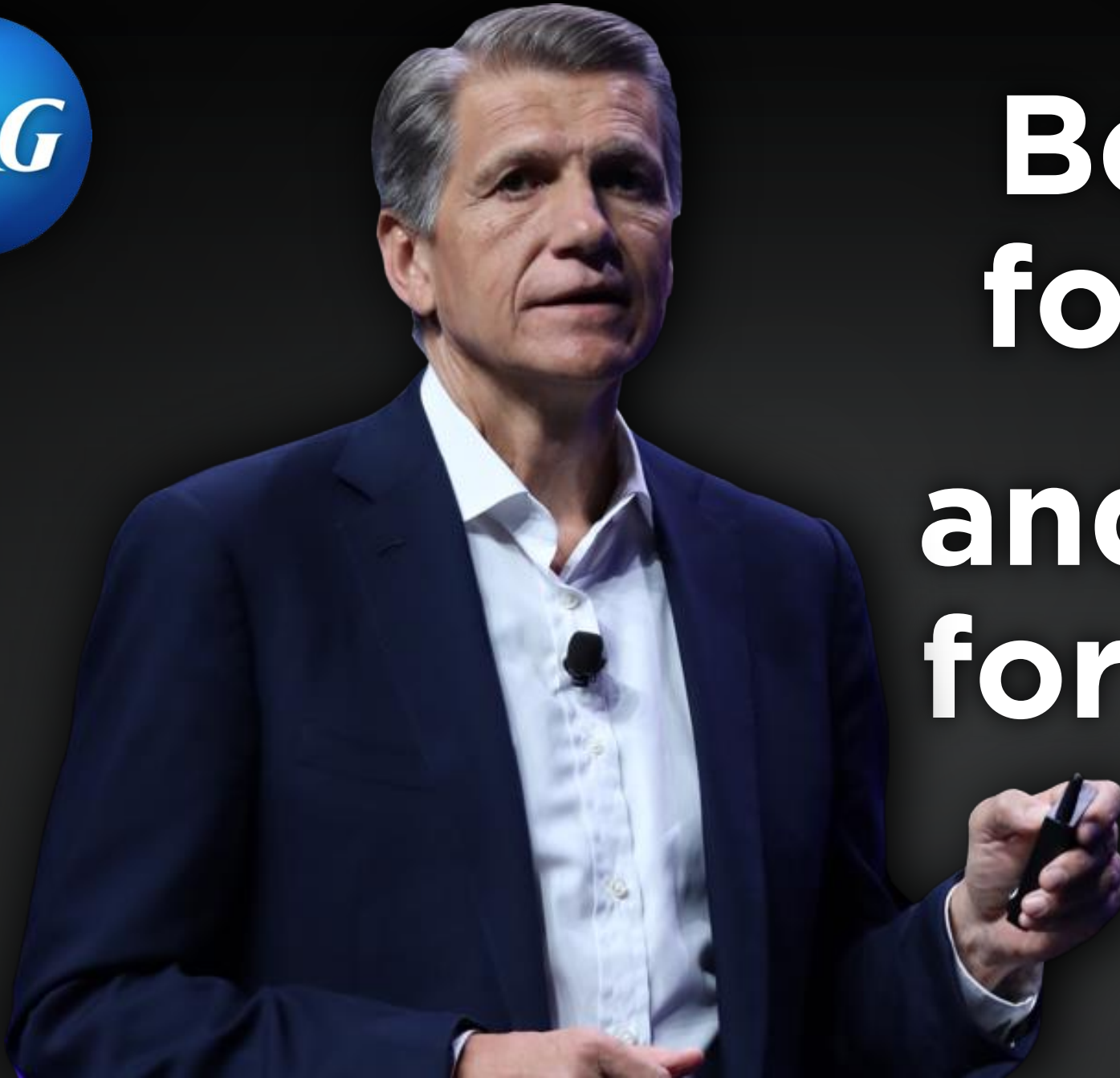




“We are sprinting through an endless obstacle course. Take a recovery break and reflect on what the world needs now and what we can do as marketers and business leaders to help. The world is ripe for **even more purpose and positivity.”**

Esi Eggleston Bracey
COO, Beauty & Personal Care





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

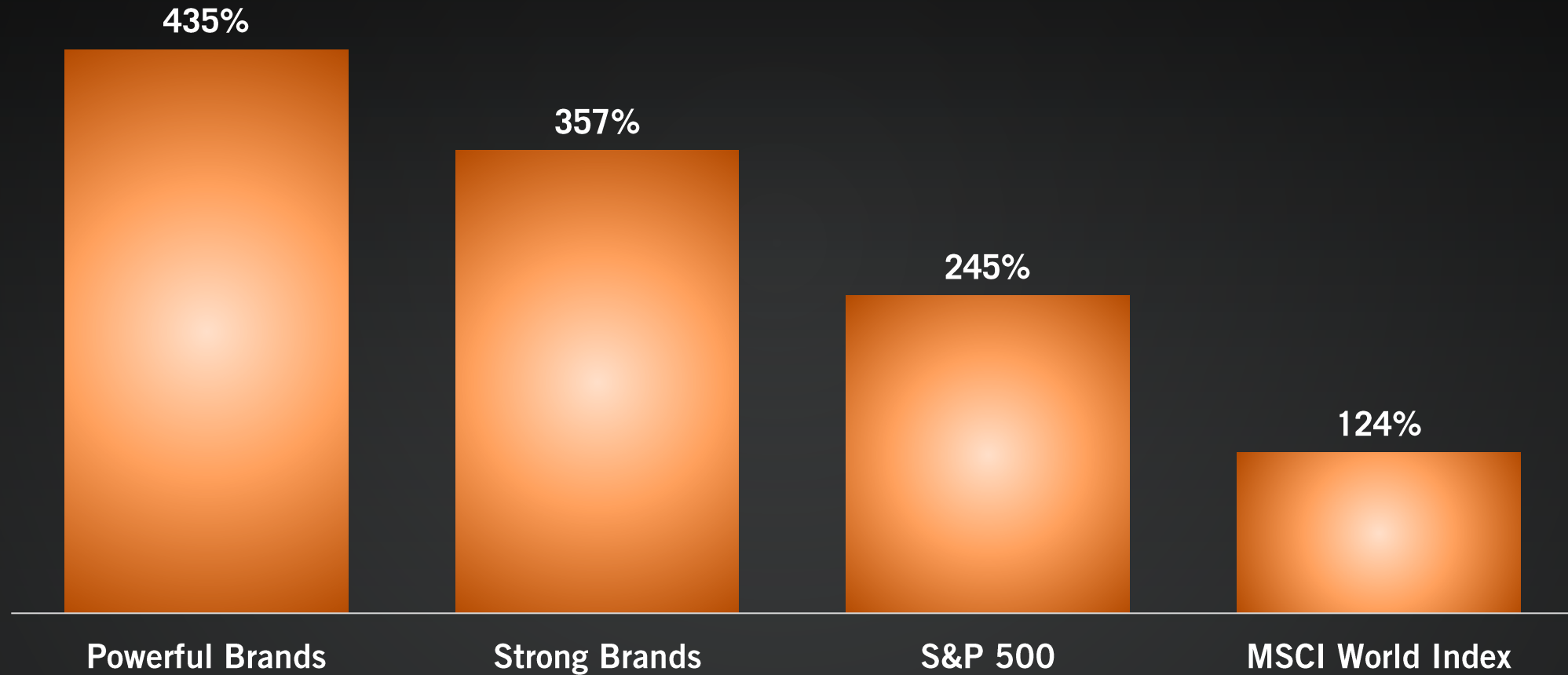
Source: Economic Outlook U.S. Q2 2023: Still Resilient, Downside Risks Rise, March 27, 2023.

Activating Brands **DRIVES GROWTH**

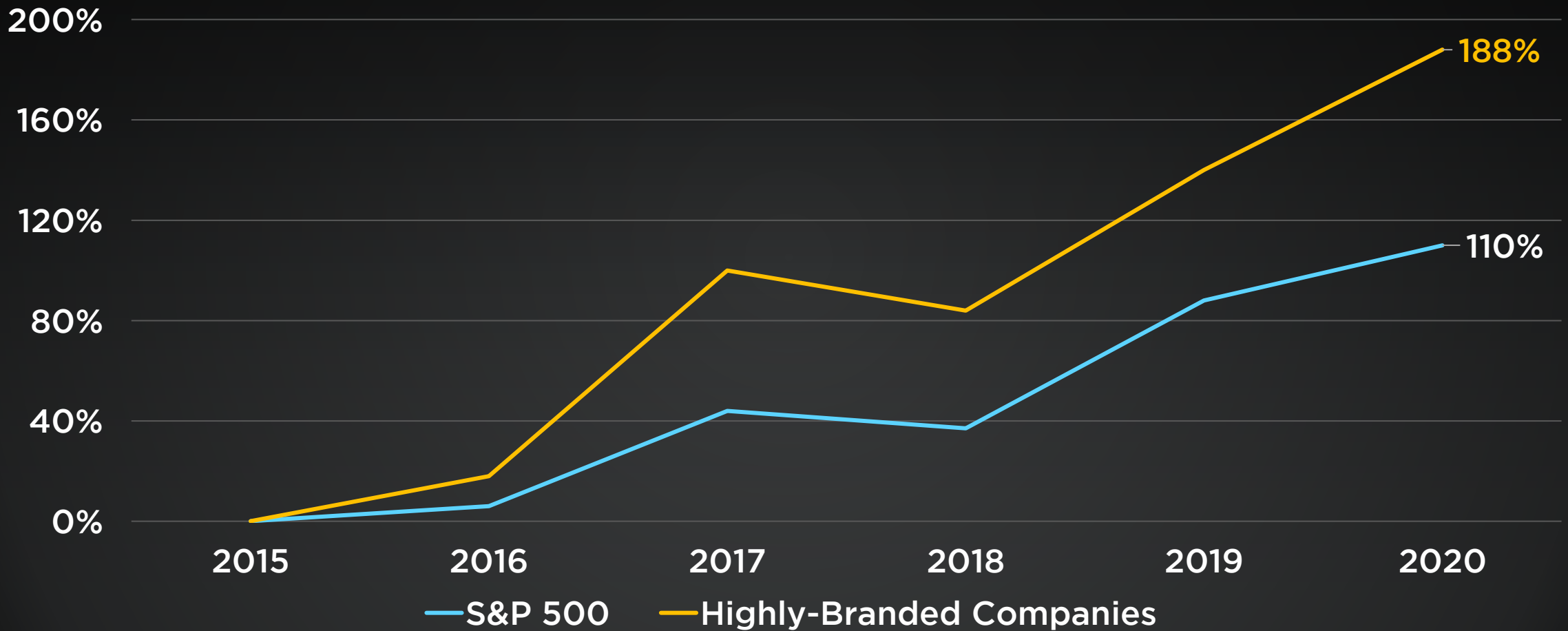


Strong Brands = Superior Returns

2006-2022



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



Source: Brand Finance



Driving Brand Growth Is COMPLEX

UNLOCKING BRAND GROWTH

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

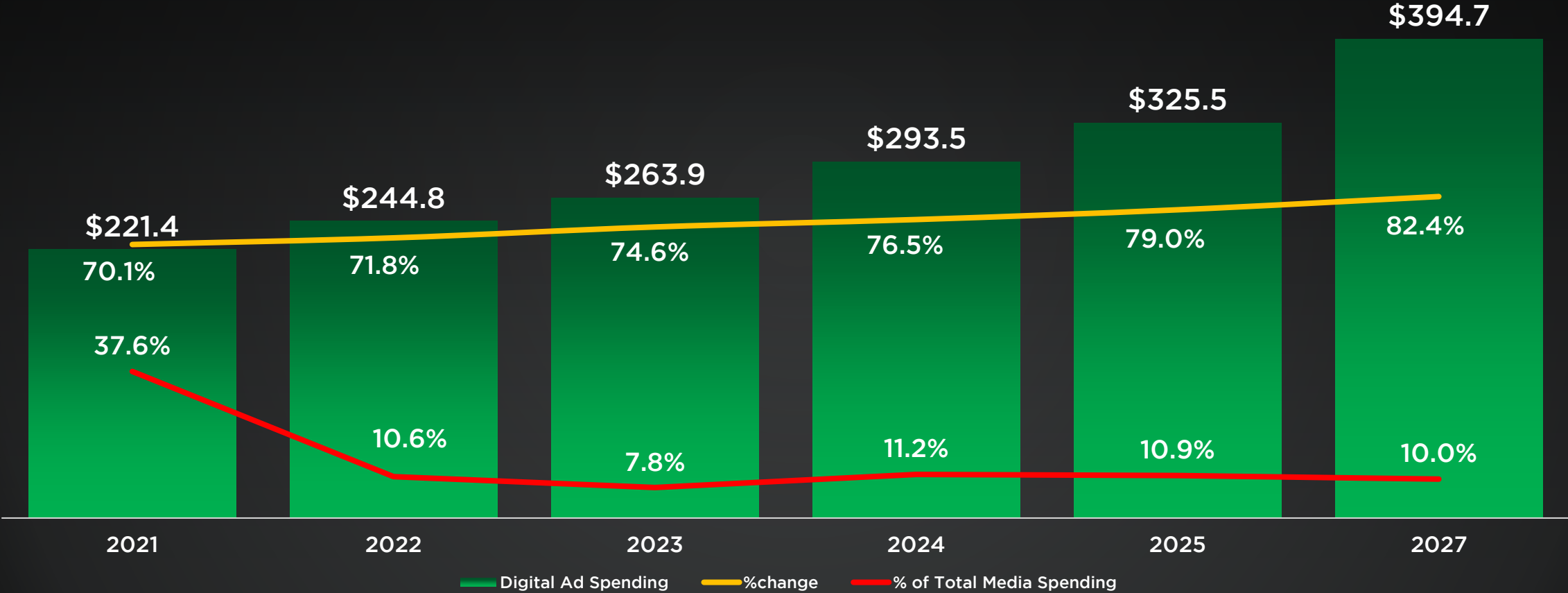
Great Digital Creative **DRIVES GROWTH**



**Digital Media
Excellence
Drives Growth**

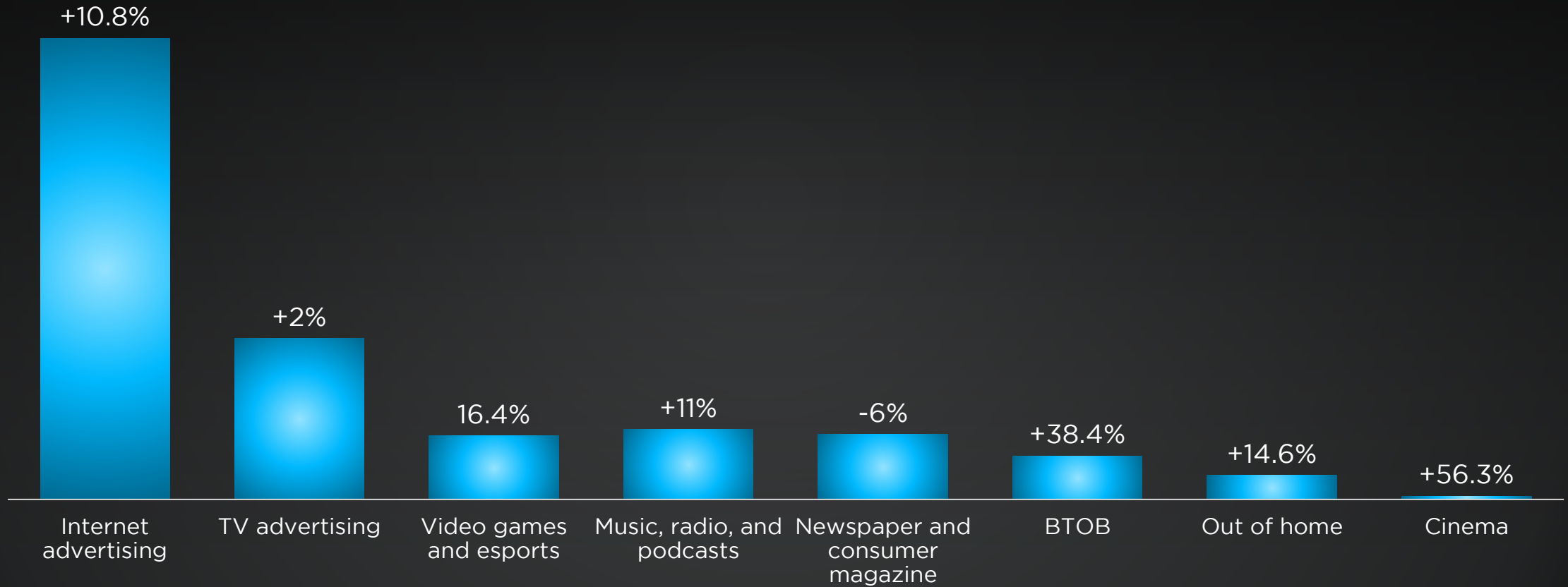
U.S. Digital Ad Spending

2021-2027 (billions)



Source: eMarketer March 2023

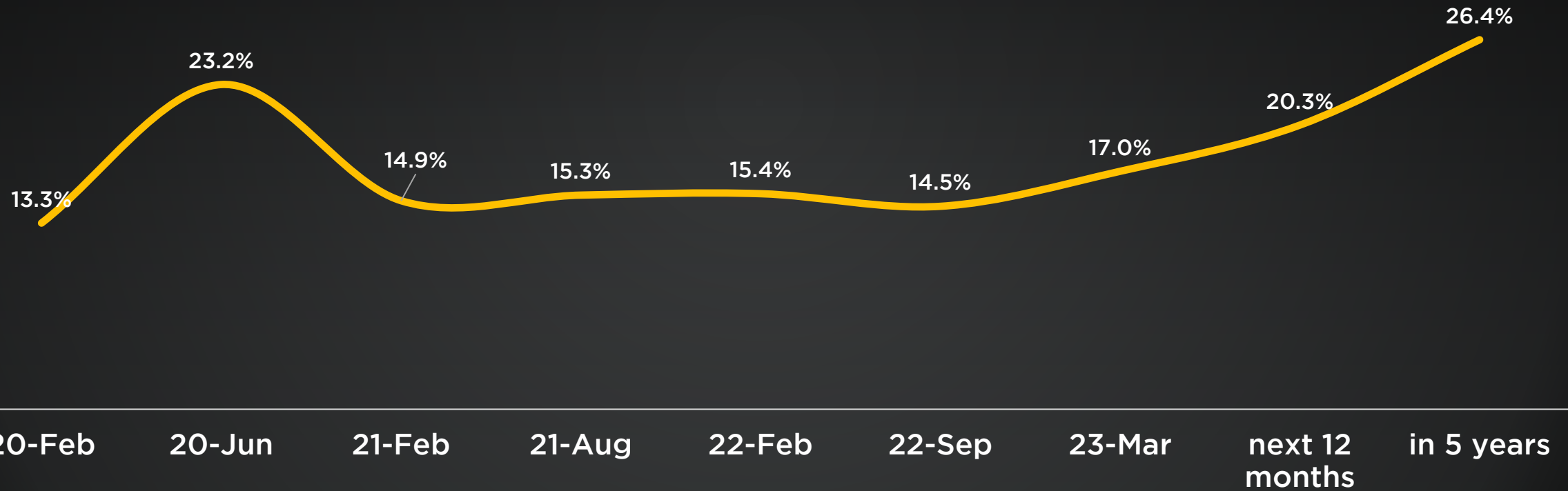
U.S. Advertising Revenues and Growth by Media



Source: *U.S. Digital Ad Spend Growth to Recover Next Year*. eMarketer, June 6, 2023

Social Media Spending

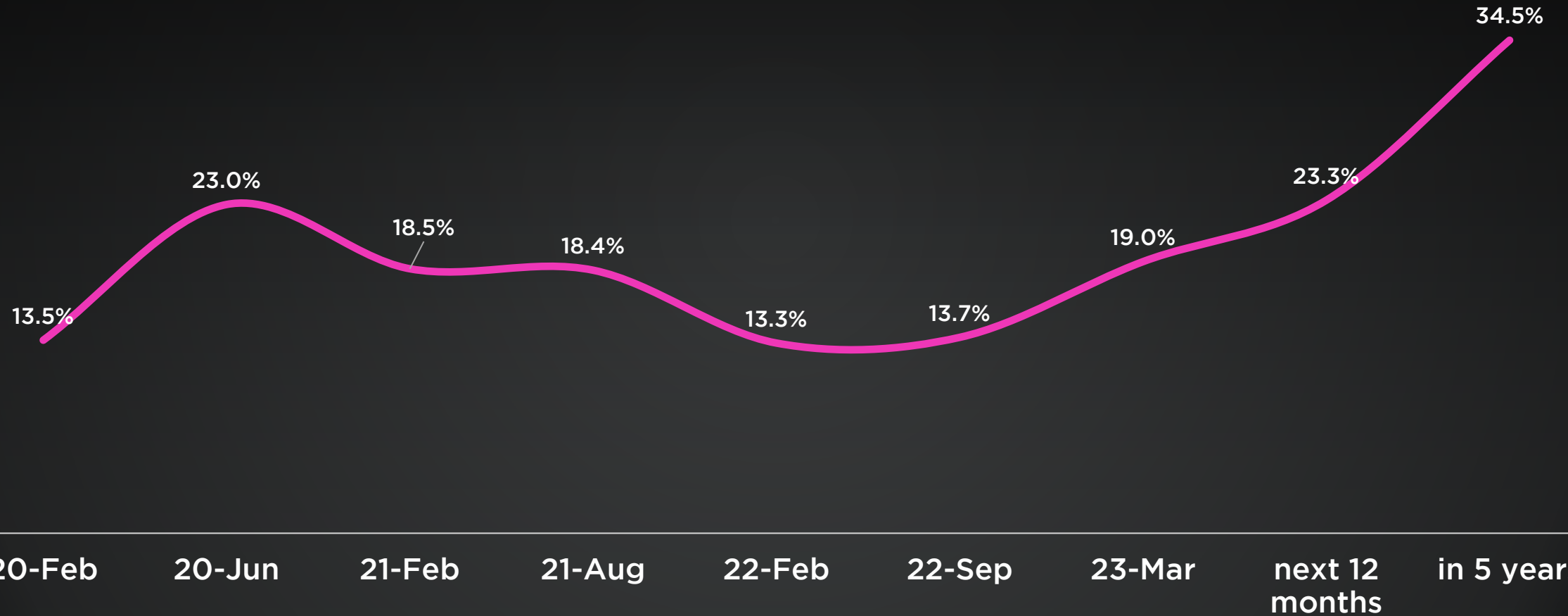
% of Marketing Budget



Source: *The CMO Survey: Managing Brand, Growth, and Metrics Report: March 2023*

Mobile Marketing Spending

% of Marketing Budget



Source: *The CMO Survey: Managing Brand, Growth, and Metrics Report: March 2023*

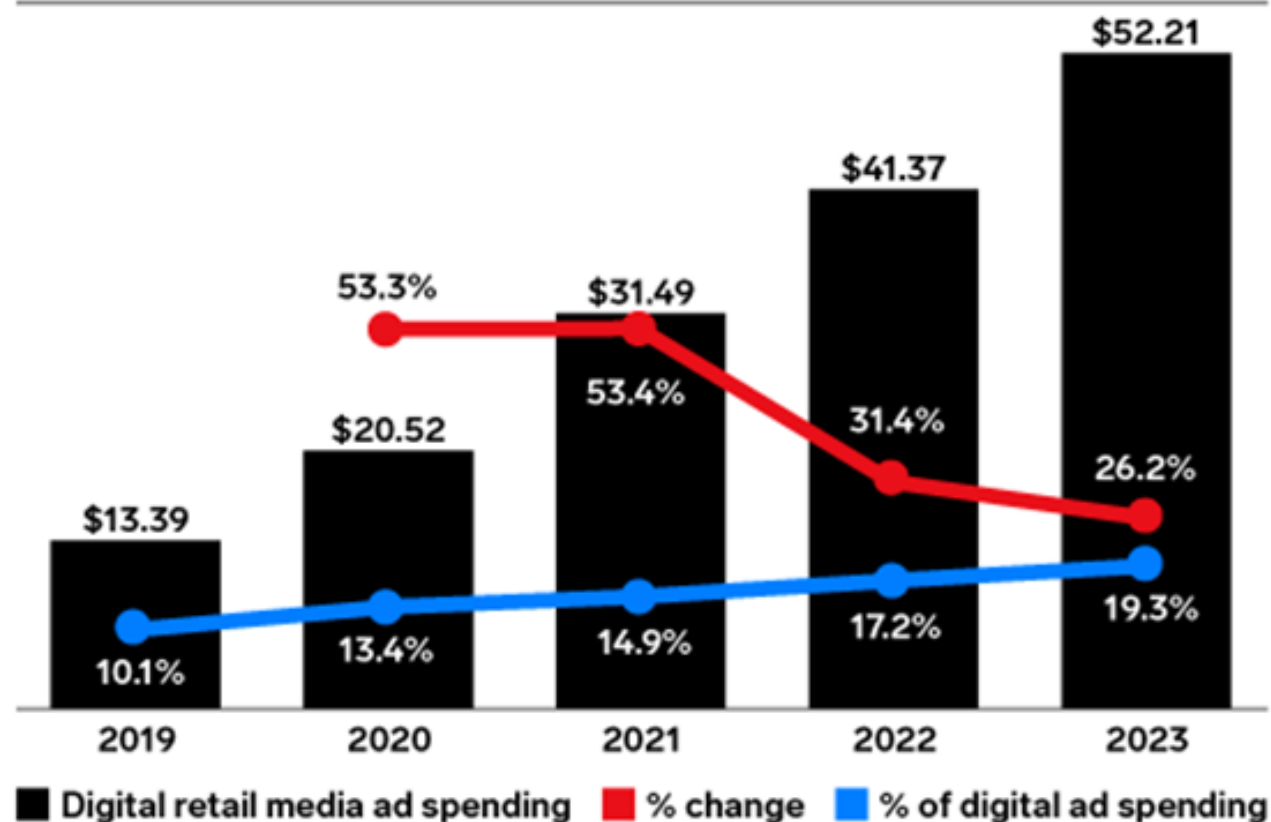
**The Media
Landscape
Continues to be
Transformed**

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



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

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 Generative AI



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 it is 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.

English Edition | Print Edition | Video | Audio | Latest Headlines | More

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

DIGITAL AND SOCIAL MEDIA ISSUES

- **Ad Fraud**
 - **Brand Safety**
 - **Online Hate**
 - **Digital Media Supply Chain Transparency**
- 
- A hand holding a smartphone is shown in the background, with various social media icons like hearts and thumbs-up floating around it, suggesting a digital or social media context.

ANA

**PROGRAMMATIC
MEDIA
SUPPLY CHAIN
TRANSPARENCY
STUDY**

FIRST LOOK



JUNE 2023

ANA.NET

INSIGHTS

1 billion waste

for Advertising

Information Asymmetry

Greater access to data

Large Campaign:

100 sites

**Digital Data and
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

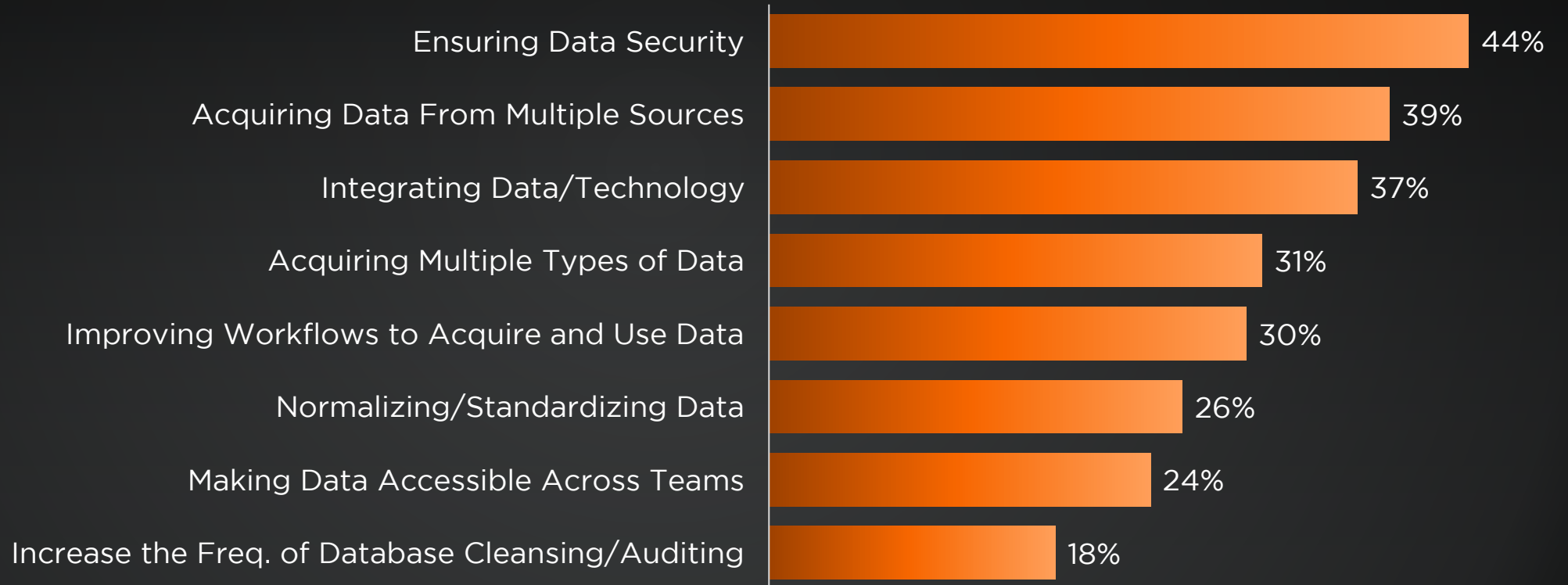
Source: *The CMO Survey: The Highlights and Insights Report February 2022*

**Digital
Measurement
Drives Growth**

MARKETING DATA QUALITY

Only 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

SPONSORED BY:



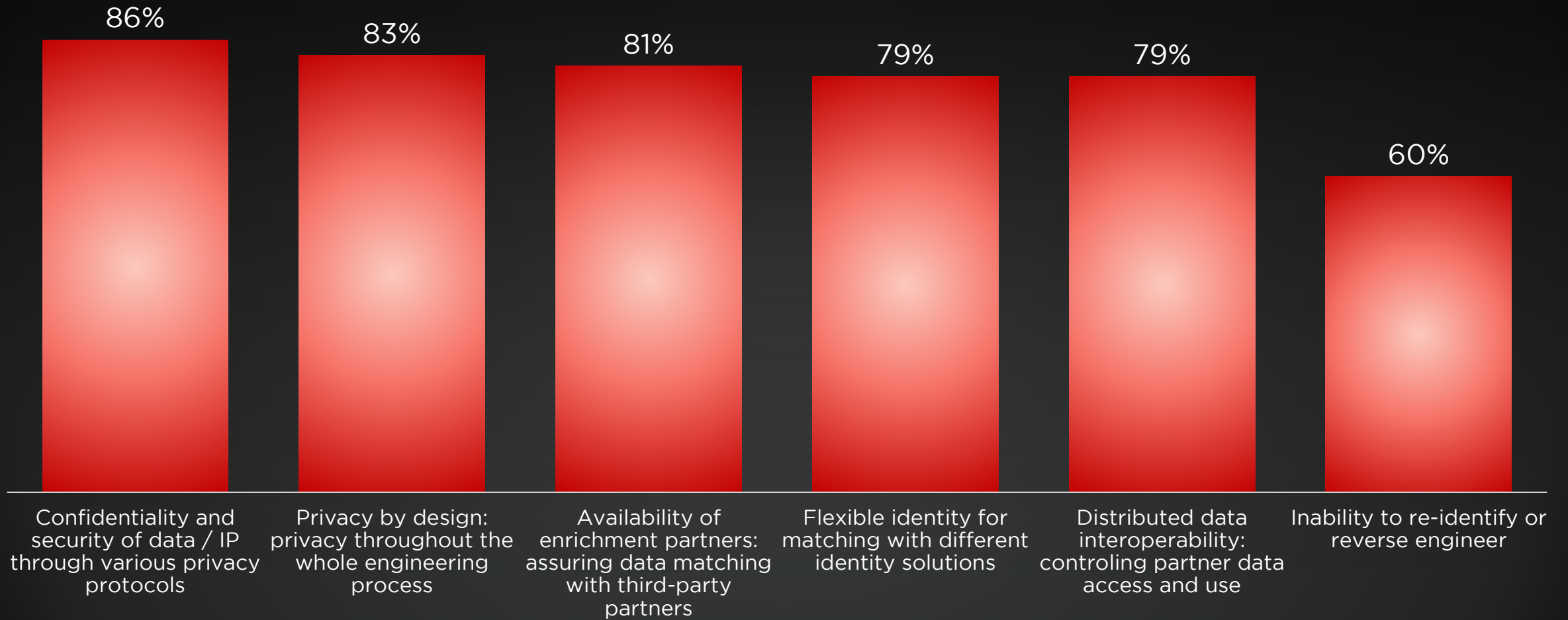
January 24, 2023



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**

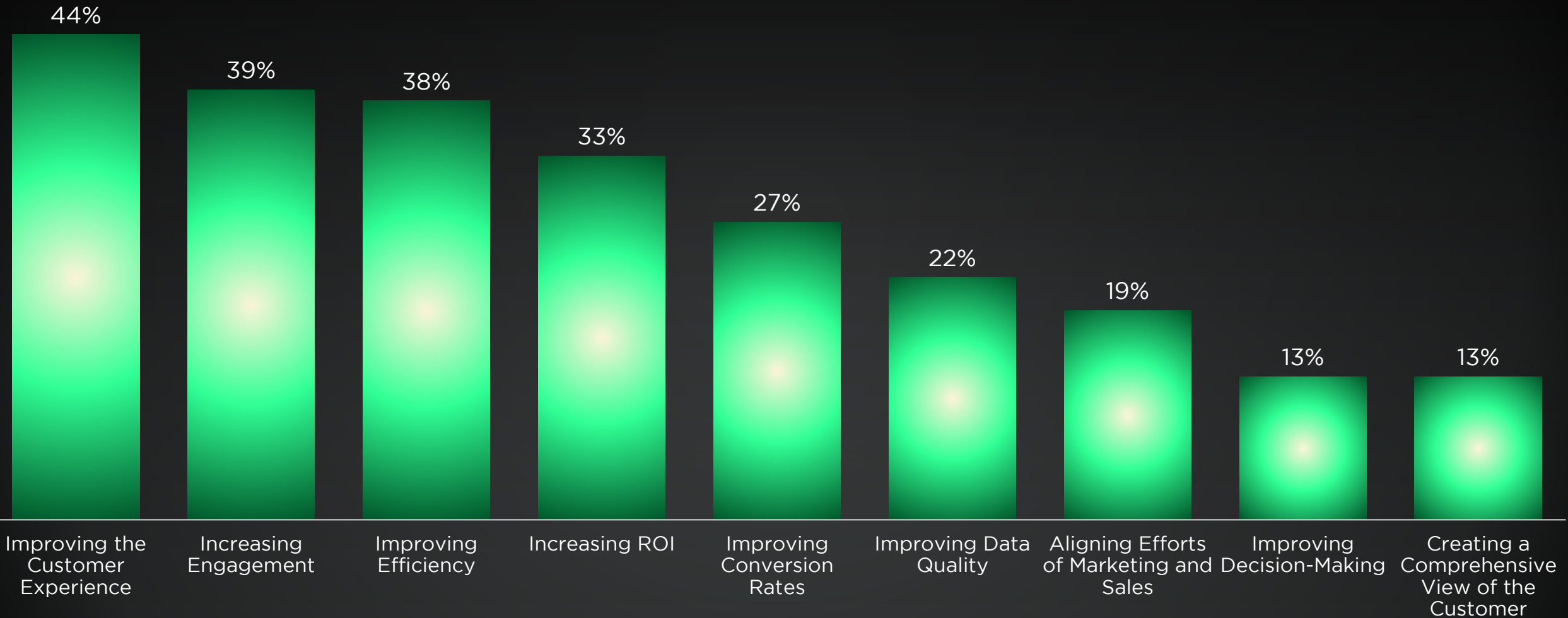
DCR Use Cases



Source: IAB State of Data Report

Technology
Drives Growth

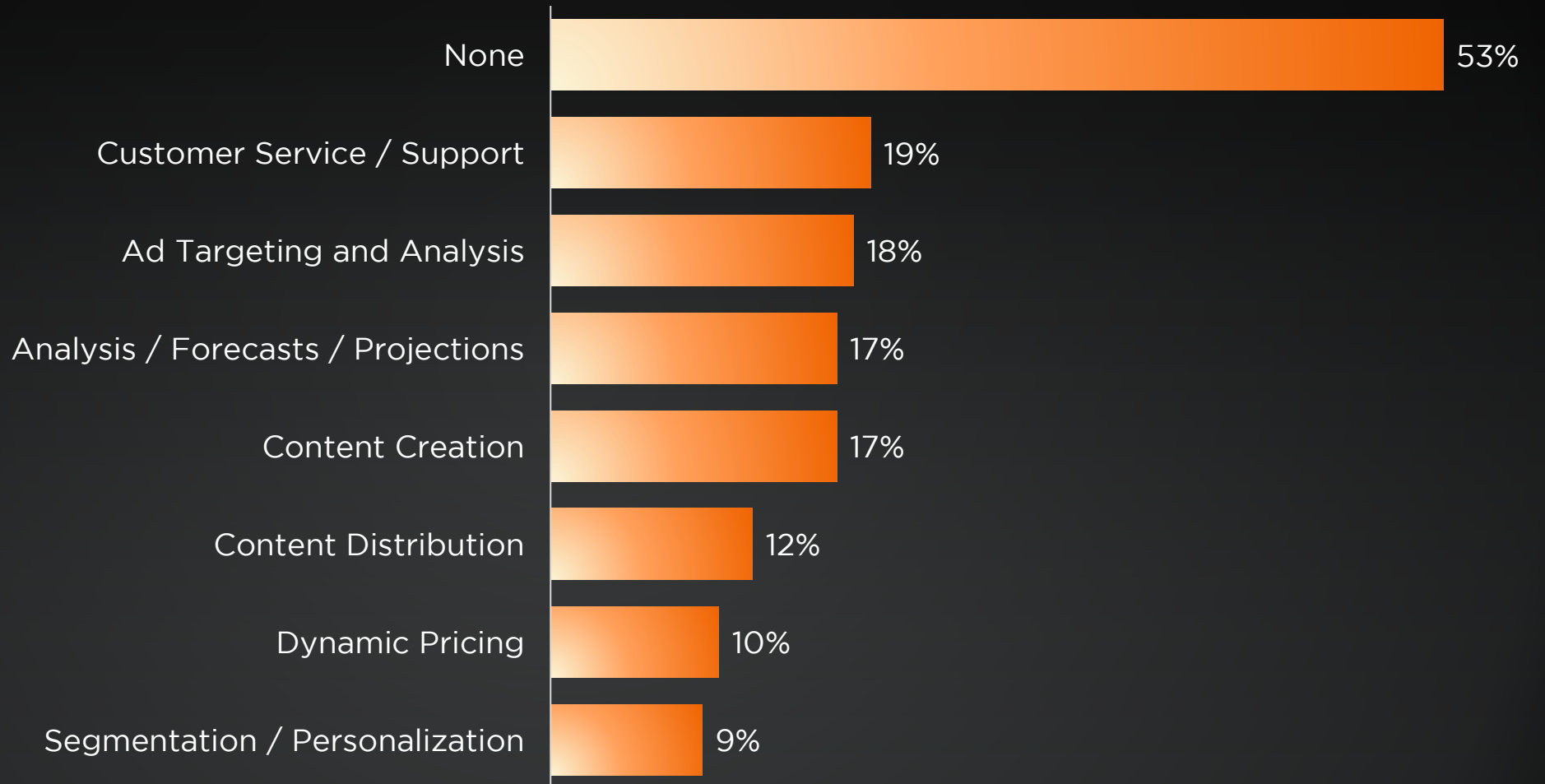
MARTECH GOALS / RATIONALE



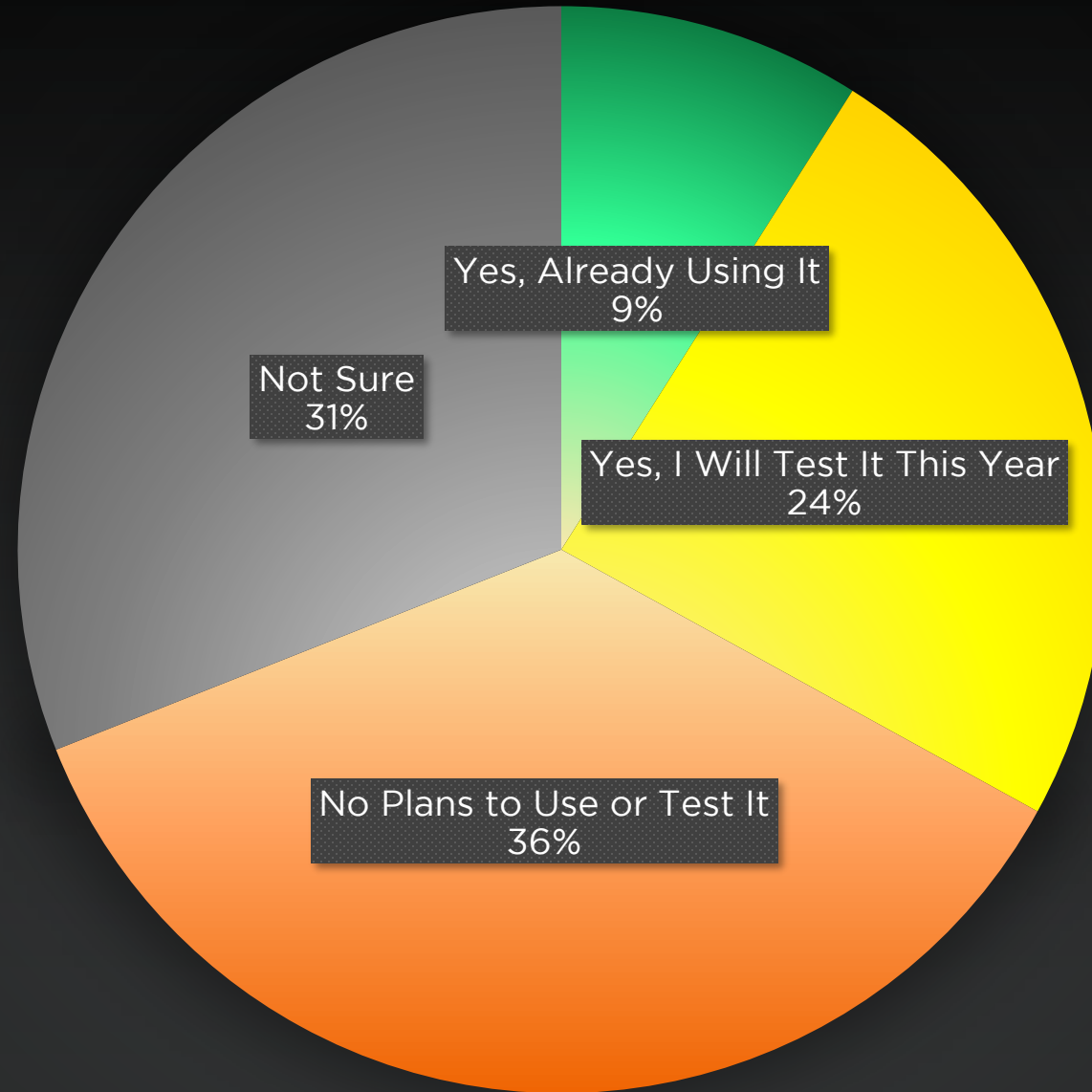
Source: *Ascend 2*

Generative AI Drives Growth

The Use of A.I.



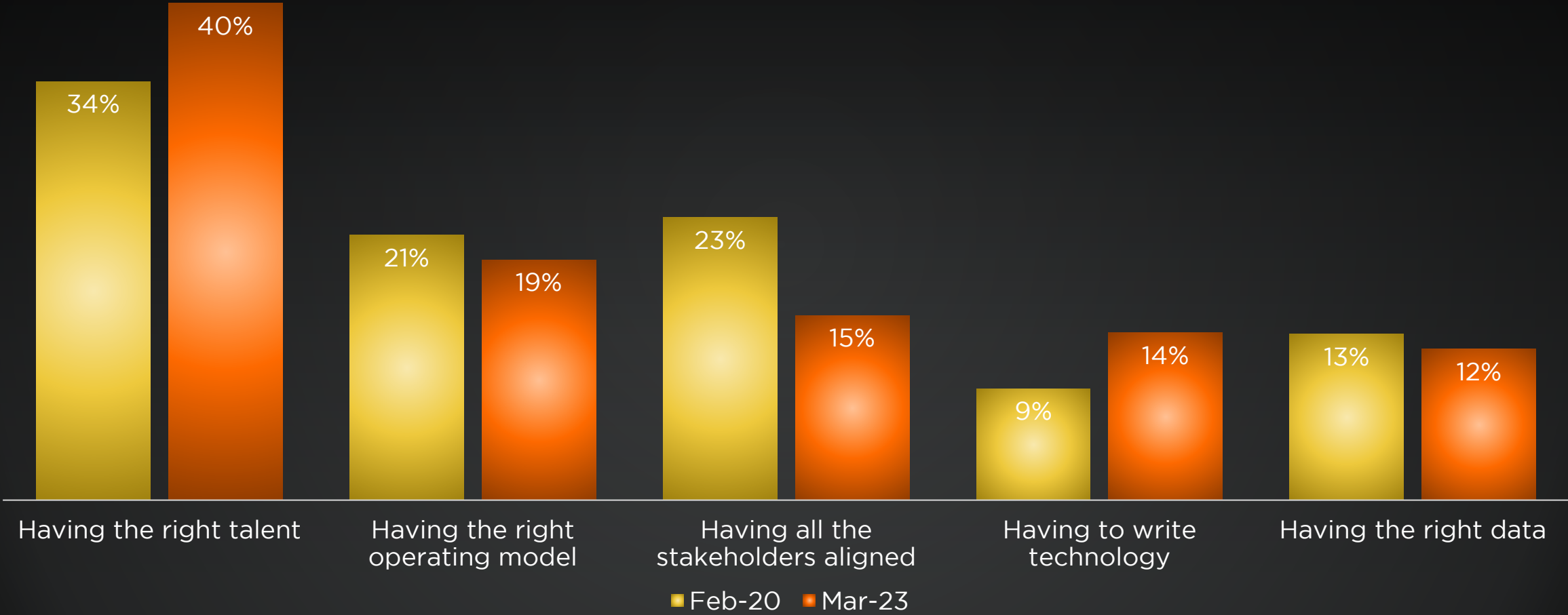
PLANS FOR USING GENERATIVE AI



A Digitally-Trained Workforce **DRIVES GROWTH**



Right Talent = Revenue Growth



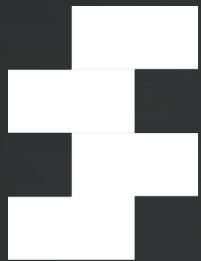
Source: *The CMO Survey: Managing Brand, Growth, and Metrics Report: March 2023*



Marketing
Training &
Development
Center

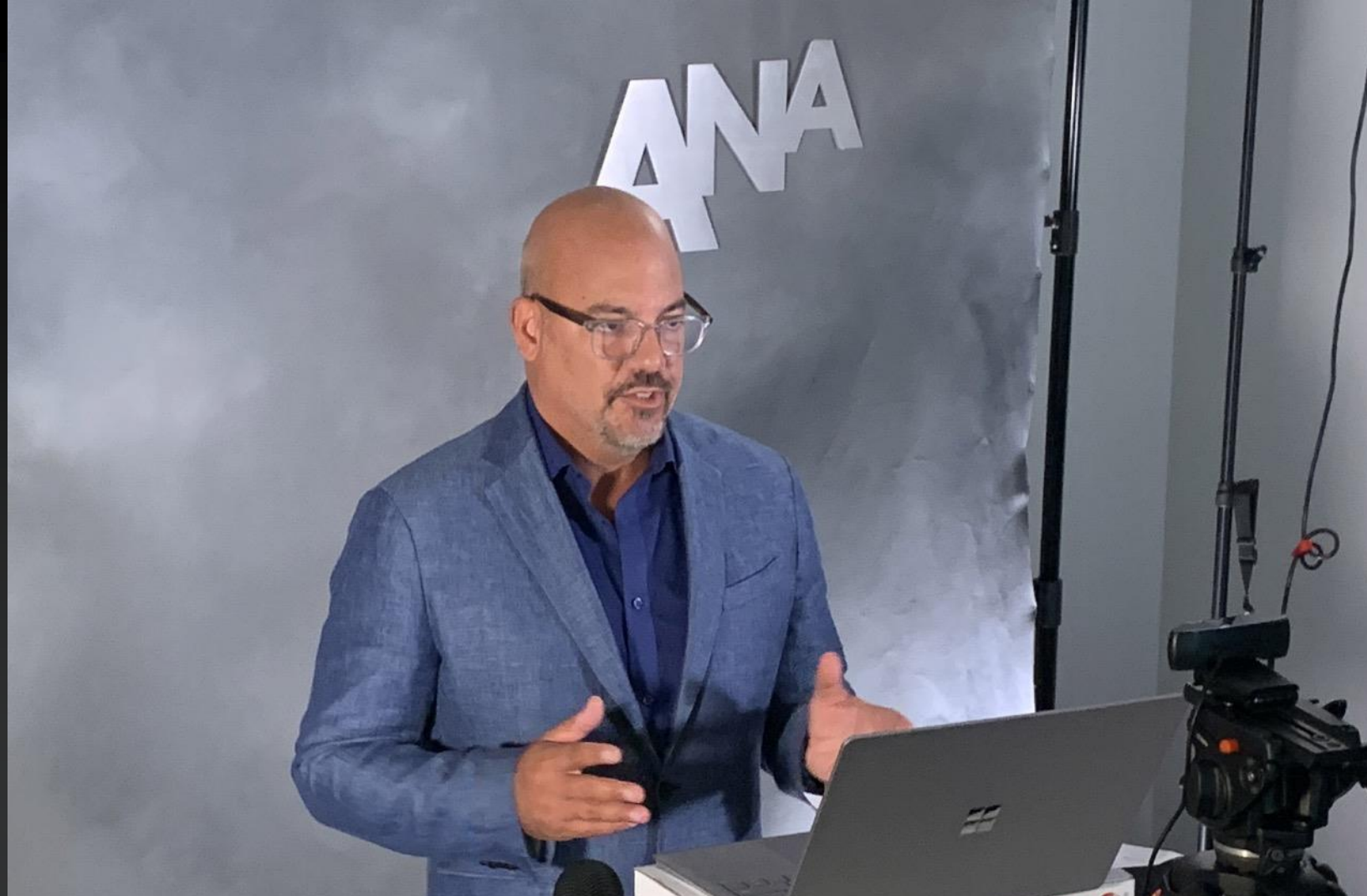


THE ANA
EDUCATIONAL
FOUNDATION



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



**Oustanding
Digital Leadership
Drives Growth**



**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**

MARKETERS' RESPONSIBILITY

“We make marketing decisions....

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

Doug Zarkin
Chief Marketing Officer

LUXOTICA®



ANA GROWTH AGENDA



2023

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JULY 17-19

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DESI OKEKE

Director, DEGREE

Unilever

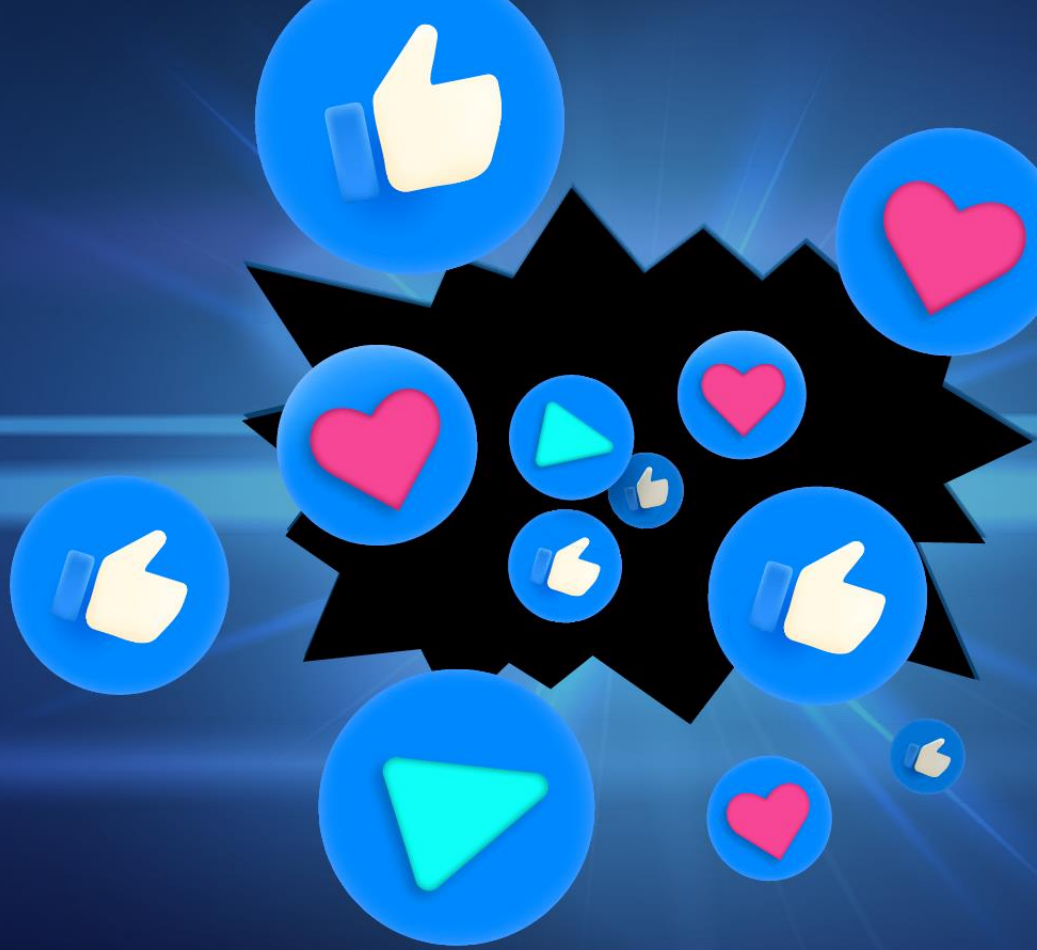
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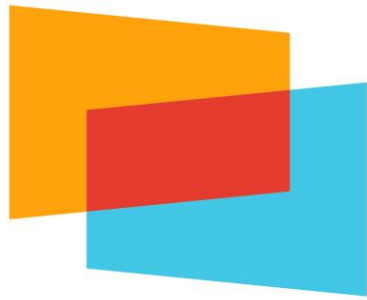
Extreme Reach

2023 ANA Digital & Social Media Conference

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comscore

WI-FI INFO



Network Name:

ANADIGITAL

Network Password:

ANADIGITAL2023!

ANA EVENTS APP



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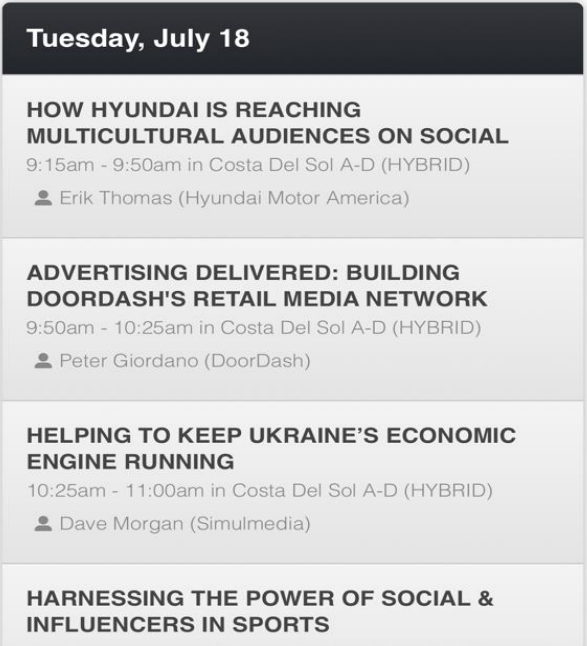
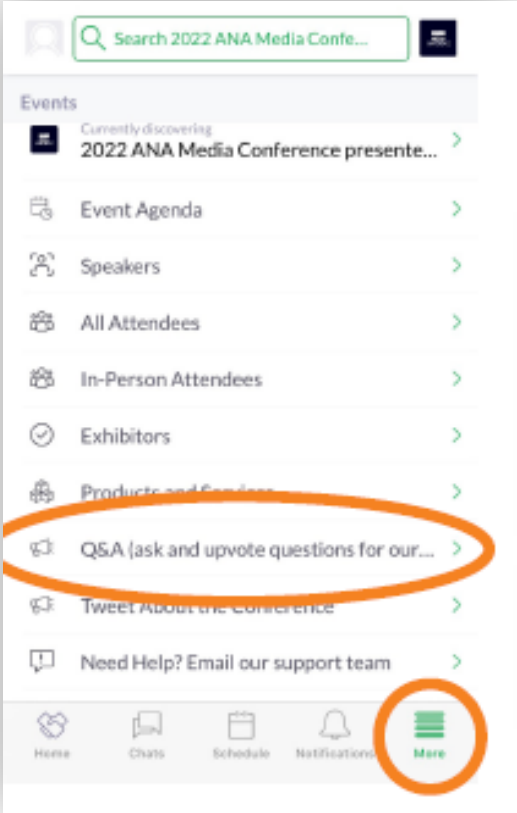
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Q&A ON THE APP

The screenshot displays the ANA app interface. At the top, there is a search bar with the placeholder text "Search for people, products or other items". Below the search bar is a navigation menu with various icons. The main content area features a large banner for the "2023 ANA Digital & Social Media Conference" presented by mntn, scheduled for July 17-19. The banner includes social media icons like thumbs up, hearts, and play buttons. Below the banner, there is a "Full Schedule" link. The schedule for July 18 is shown, with a session titled "HOW HYUNDAI IS REACHING MULTICULTURAL AUDIENCES ON SOCIAL" highlighted by a green box and a green arrow. The session details include the time "9:15am - 9:50am in Costa Del Sol A-D (HYBRID)" and the speaker "Erik Thomas (Hyundai Motor America)". Other sessions listed include "ADVERTISING DELIVERED: BUILDING DOORDASH'S RETAIL MEDIA NETWORK" by Peter Giordano (DoorDash), "HELPING TO KEEP UKRAINE'S ECONOMIC ENGINE RUNNING" by Dave Morgan (Simulmedia), and "HARNESSING THE POWER OF SOCIAL & INFLUENCERS IN SPORTS" by Amanda Anderson (ESPN) and Omar Raja (ESPN). The top right corner of the app shows navigation icons for home, notifications, and profile, with a green arrow pointing to the profile icon.

Q&A ON THE APP

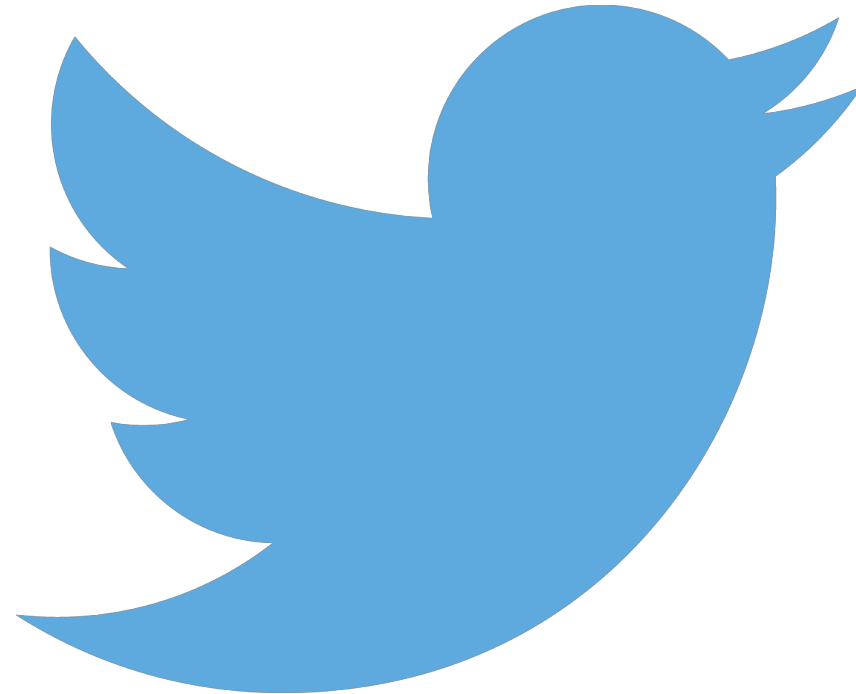


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**EMAIL OUR
SUPPORT TEAM**
streaming@ana.net



#ANADigital



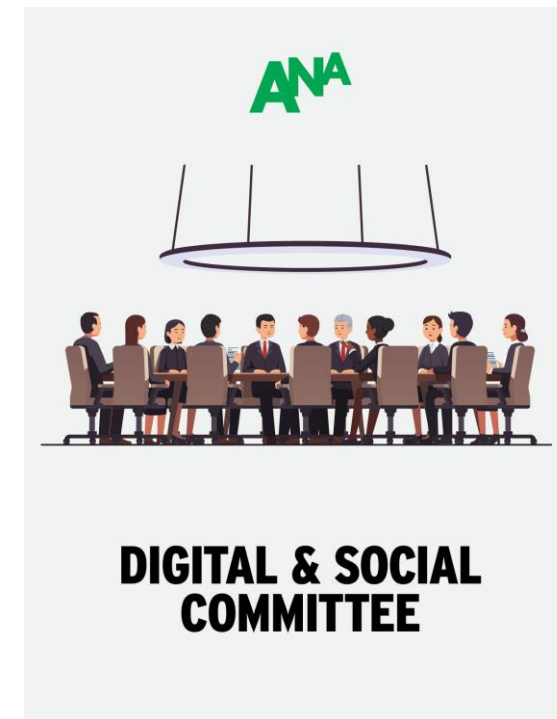
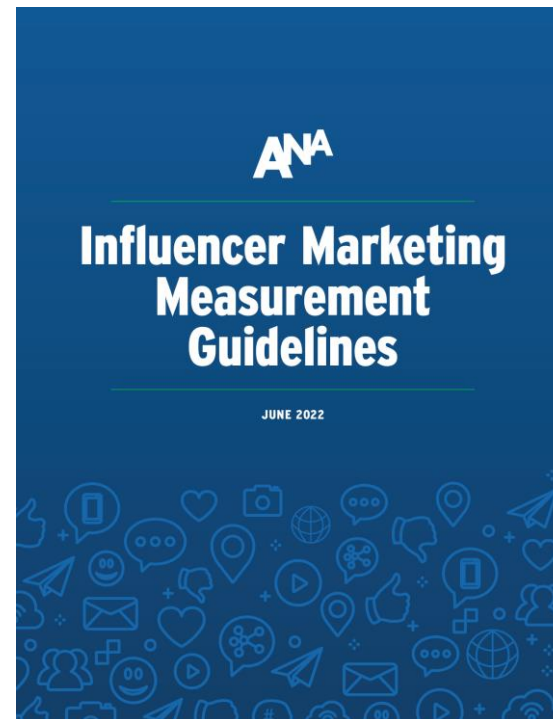
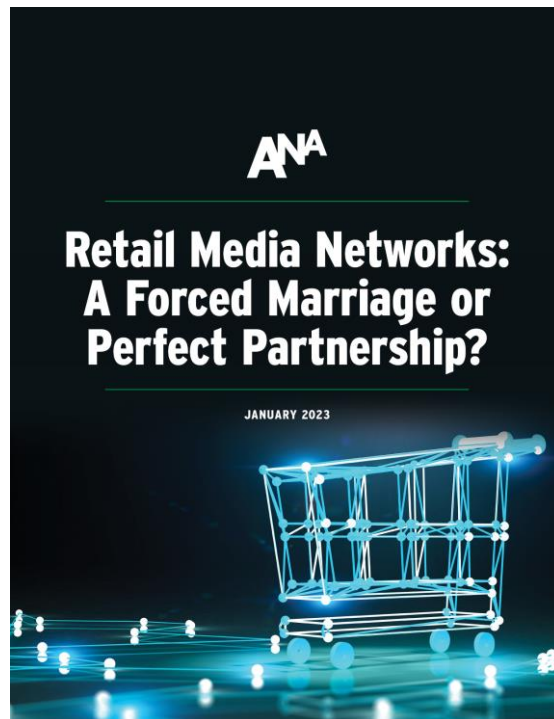
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