



ANA

**2023 ANA
MASTERS OF
MARKETING**

BOB LIODICE
CHIEF EXECUTIVE OFFICER

STRATEGIC PARTNERS **ANA**



A diverse group of people of various ages and ethnicities are shown in a state of high energy and celebration. Many have their arms raised in the air, some with clenched fists, and their mouths are wide open as if shouting or cheering. The background is dark, making the people stand out. The overall mood is one of joy and triumph.

**Time to
CELEBRATE!!!**



“Marketing magic exists
between consumer truth
and product truth.

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

Soyoung Kang
CMO, eos



A Time to Pause



SOCIETAL CHALLENGES

- **War in Israel / Gaza**
- **War in Ukraine**
- **Societal Unrest**
- **Government Dysfunction**
- **Economic Uncertainties**



“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

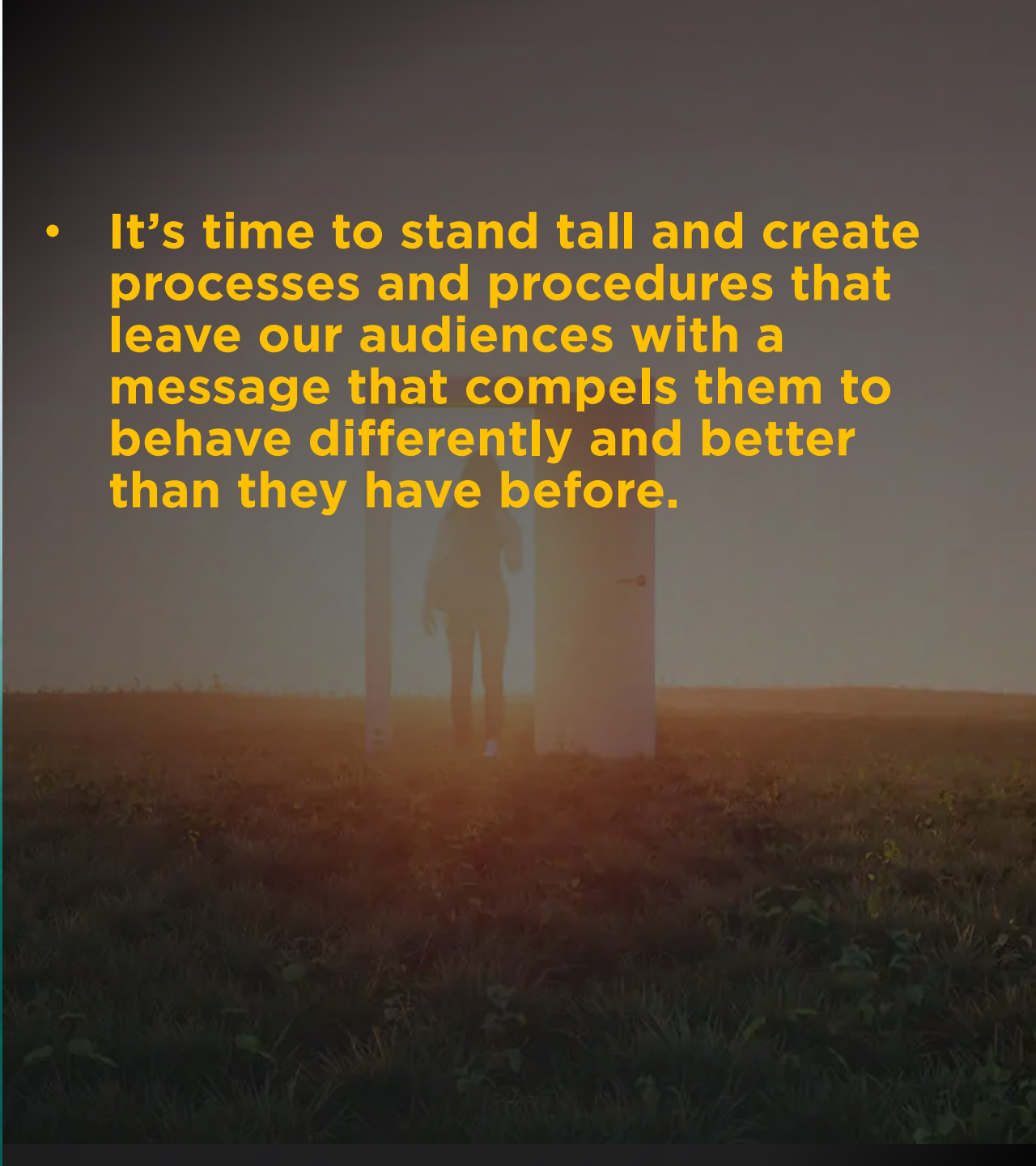


TIME
for
change





TIME
for
Change

- It's time to stand tall and create processes and procedures that leave our audiences with a message that compels them to behave differently and better than they have before.
- 



TIME
for
Change

- It's time to stand tall and create processes and procedures that leave our audiences with a message that compels them to behave differently and better than they have before.
- **We will be successful when we eliminate systemic barriers.**



TIME
for
Change

- It's time to stand tall and create processes and procedures that leave our audiences with a message that compels them to behave differently and better than they have before.
- We will be successful when we eliminate systemic barriers.
- **We have a responsibility to change the industry by prioritizing the importance of equitable investment, culture, and diverse marketing.**



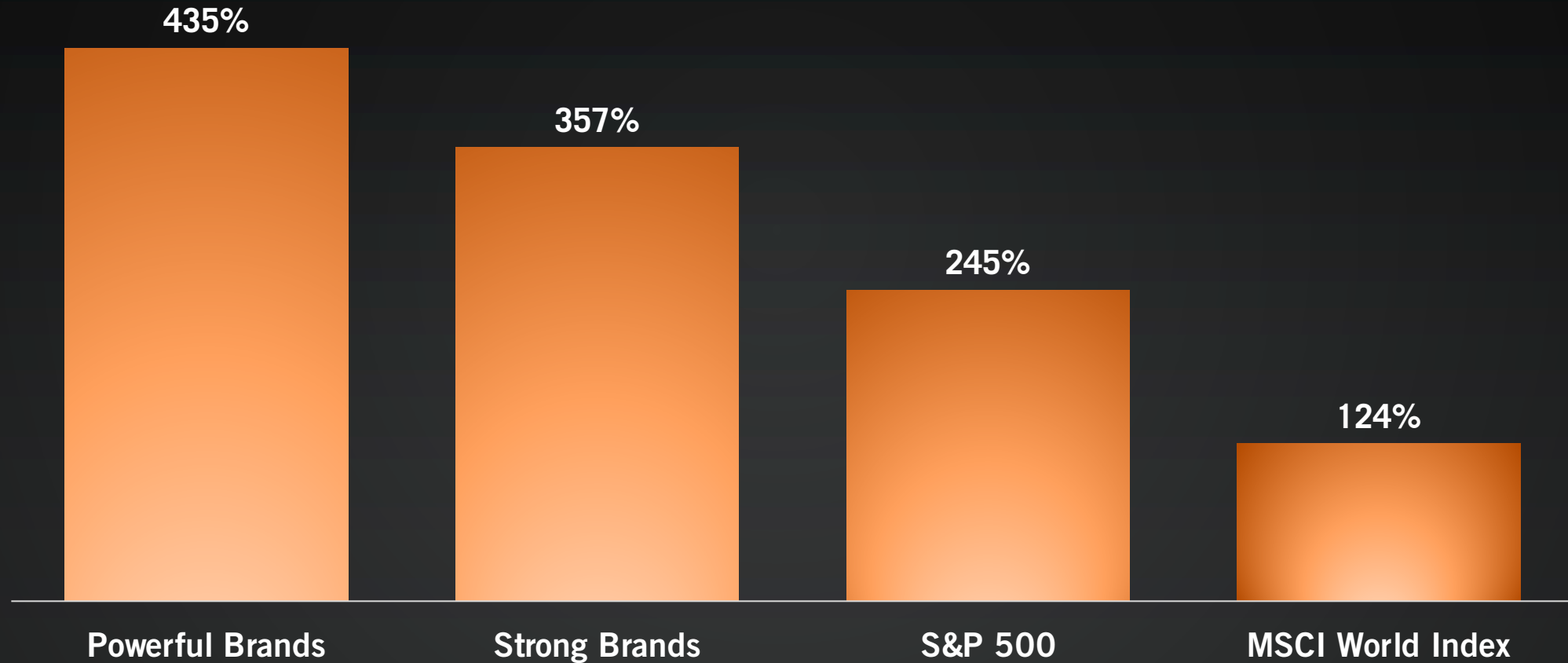
HUMANITY FOR GROWTH

Activating Brands DRIVES GROWTH

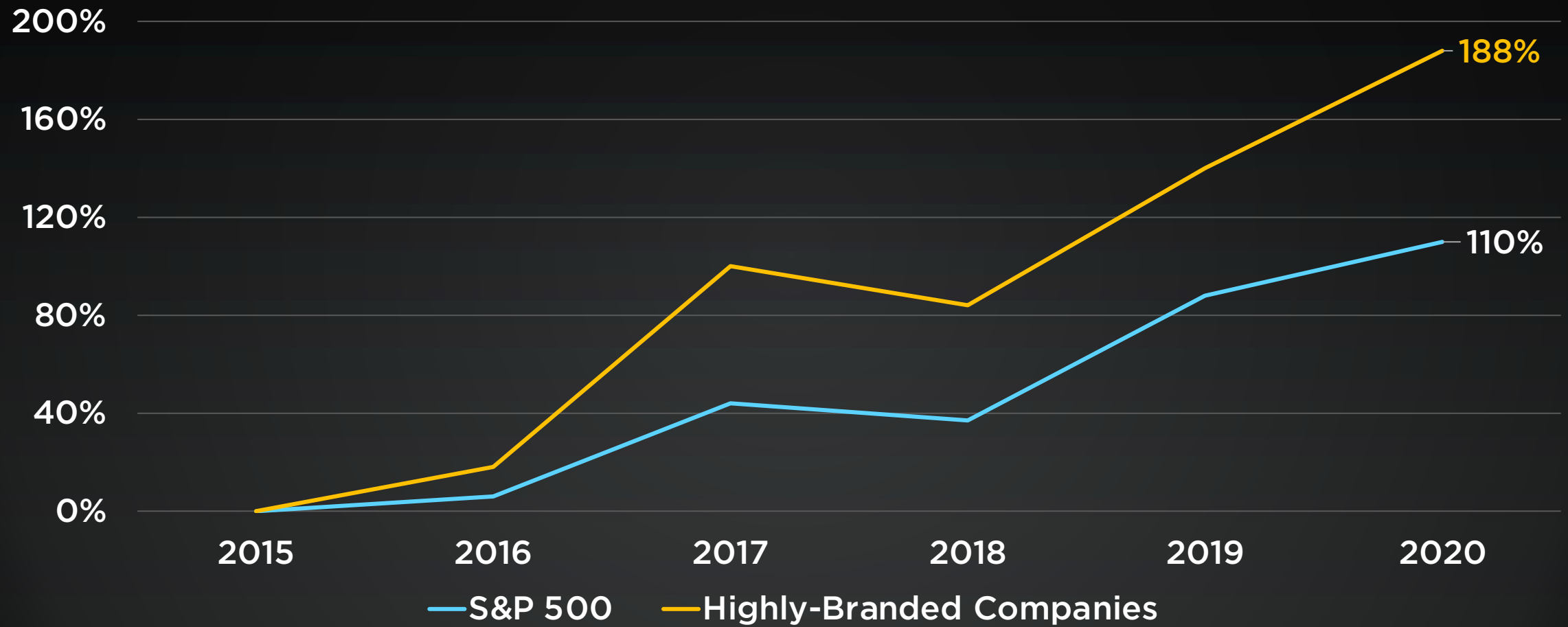


Strong Brands = Superior Returns

2006-2022



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



Source: Brand Finance



Driving Brand Growth Is COMPLEX

UNLOCKING BRAND GROWTH

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

**But it begins with
Creativity!!**

**With a dose of
Imagination**

**Our industry needs
so much more...**

Media Excellence **DRIVES GROWTH**

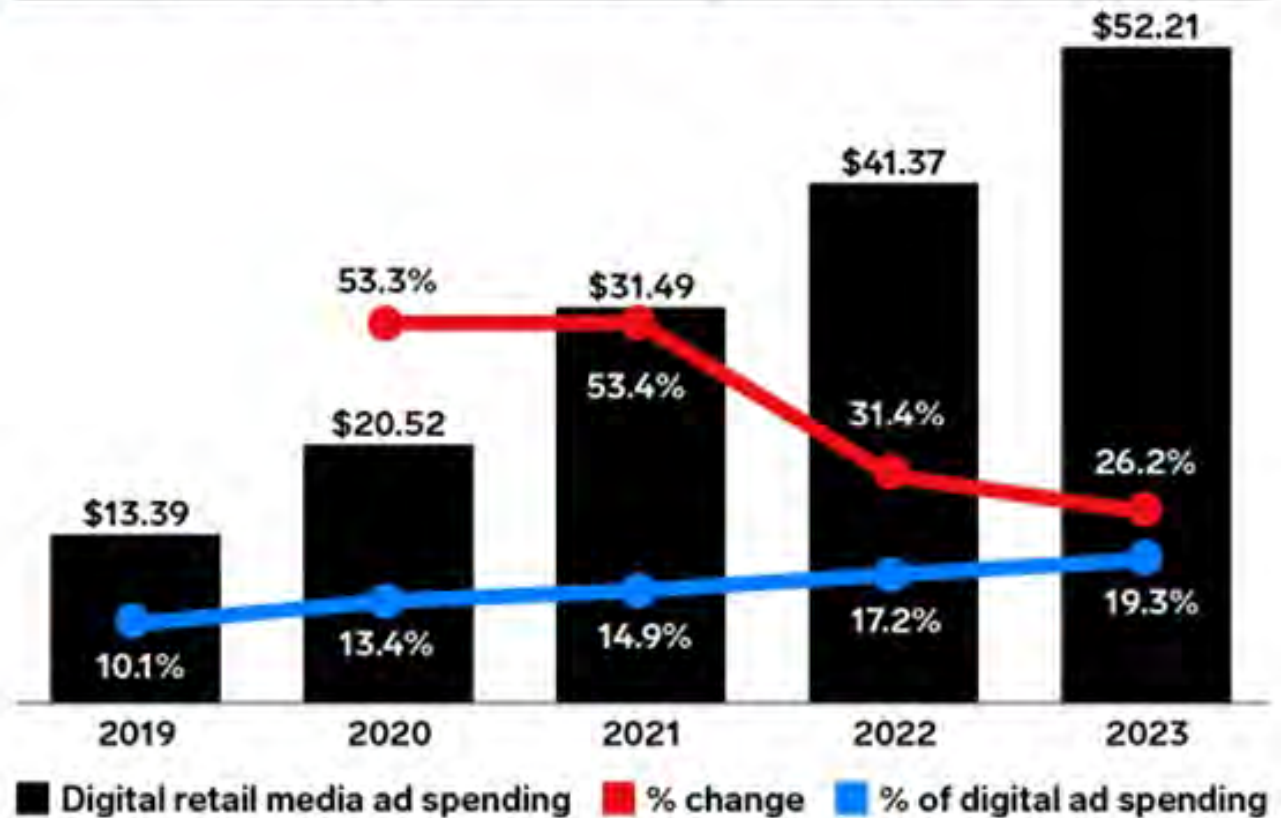


RETAIL MEDIA NETWORKS

\$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



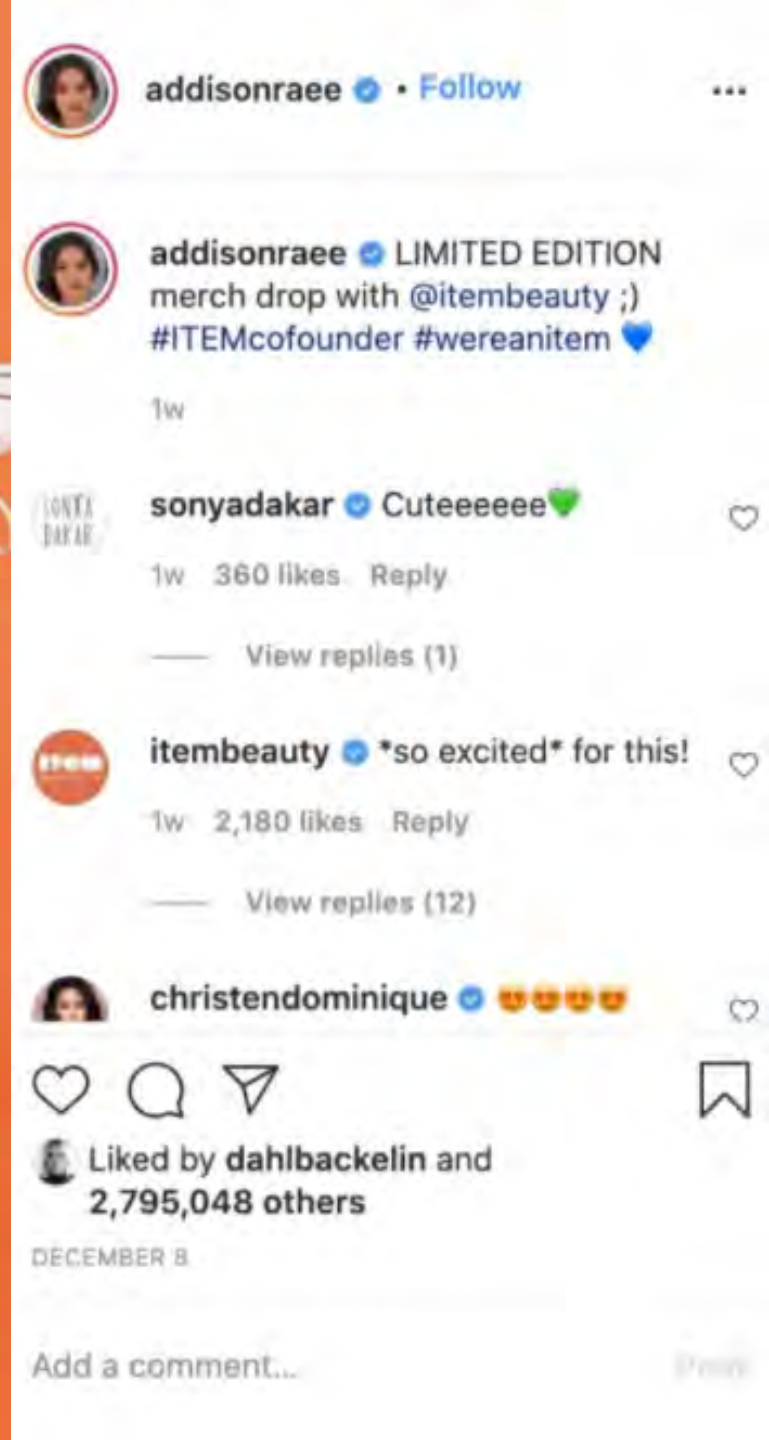
Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include advertising on Amazon, Walmart, and eBay; 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





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 the most powerful and 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

ANA

**PROGRAMMATIC
MEDIA
SUPPLY CHAIN
TRANSPARENCY
STUDY**

FIRST LOOK



JUNE 2023

ANA.NET

INSIGHTS

1.5 billion waste

Information Asymmetry

Greater access to data

Ad Campaign:

100 sites



Diverse Media

GROWTHFRONTS

SEEHER  SHE FRONT

Superior Data Analytics **DRIVE 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**



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

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**

The graphic features the ANA logo in white at the top, with the text 'CROSS-MEDIA MEASUREMENT' in yellow below it. The background is a dark grey circle containing a stylized grey figure of a person with arms raised, and a bar chart with three bars of increasing height. The text 'ANA' is in a bold, sans-serif font. The text 'CROSS-MEDIA MEASUREMENT' is in a bold, sans-serif font, with 'CROSS-MEDIA' on the top line and 'MEASUREMENT' on the bottom line.

ANA
**CROSS-MEDIA
MEASUREMENT**

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

DEIB Measurement ADVANCES



**Privacy-Preserving
Technology
Drives Growth**



State of Data 2023

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

SPONSORED BY:



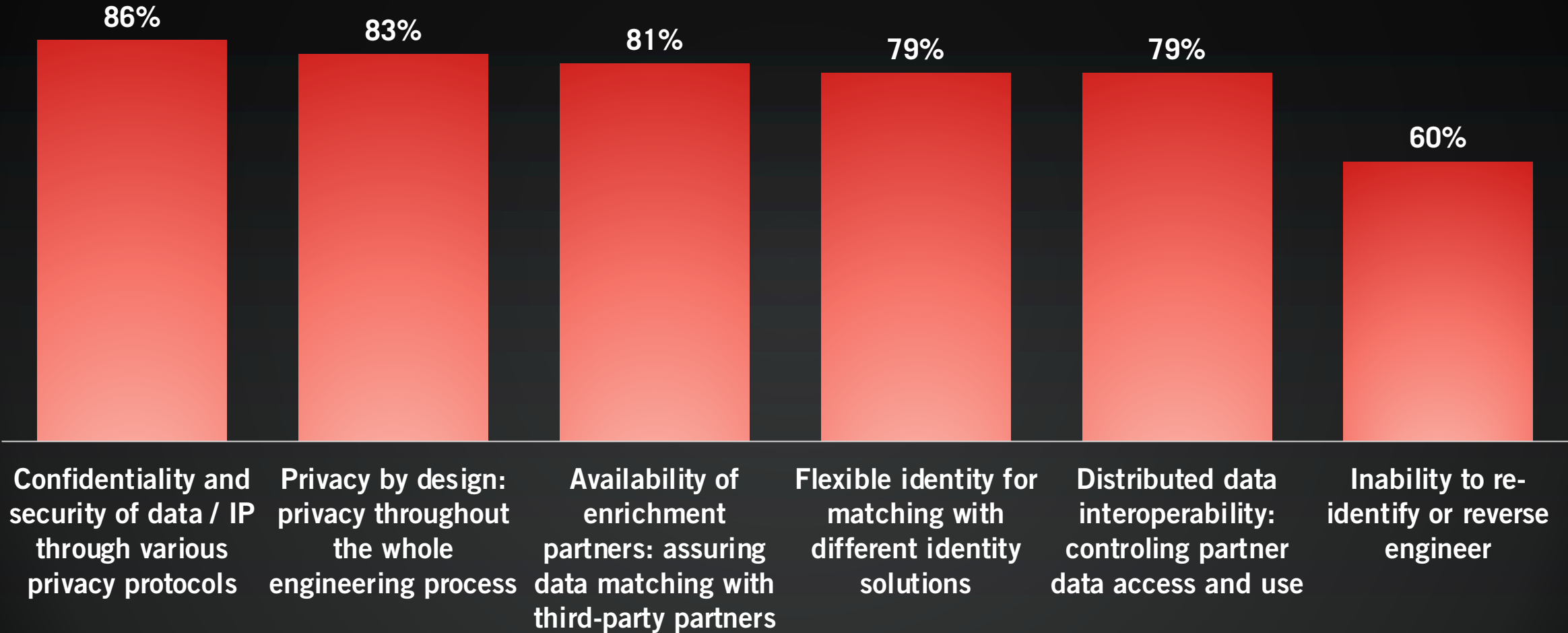
January 24, 2023



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

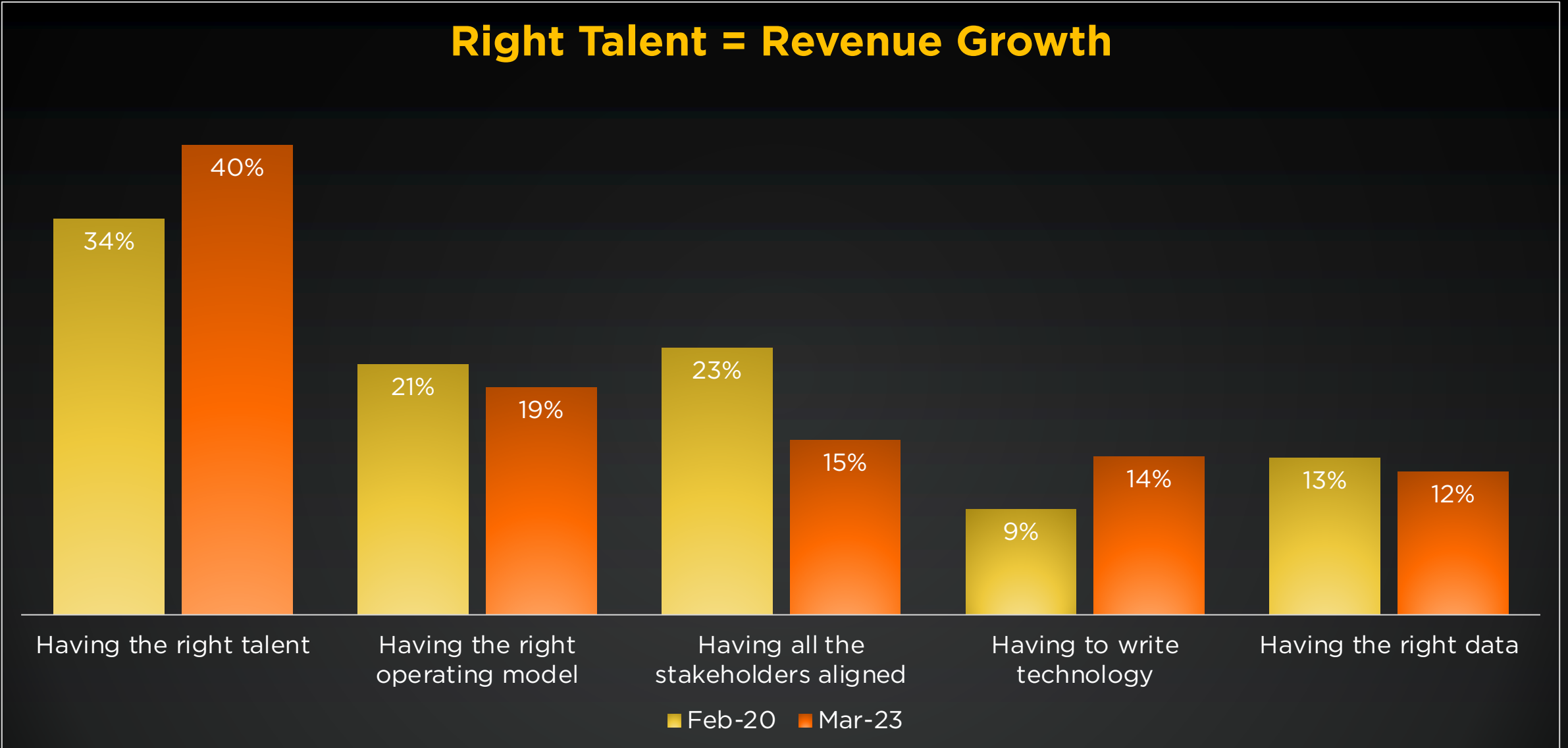


Source: IAB State of Data Report

A Digitally-Trained Workforce **DRIVES GROWTH**



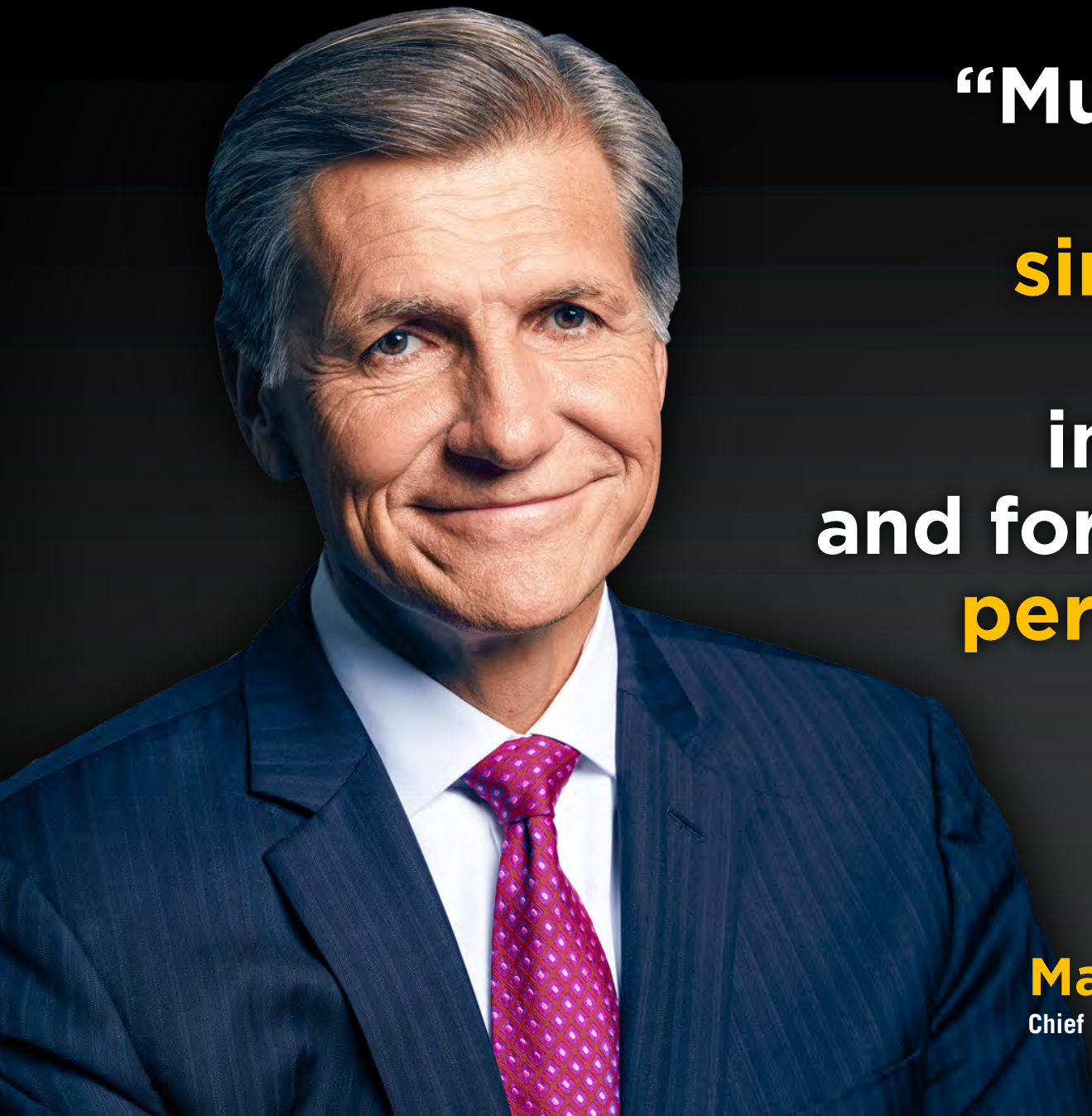
Right Talent = Revenue Growth



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

**DEIB EXCELLENCE
DRIVES GROWTH**





**“Multicultural marketing
may be the
single biggest source
of growth
in our industry now,
and for the next several years...
perhaps even decades.”**

Marc Pritchard
Chief Brand Officer



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



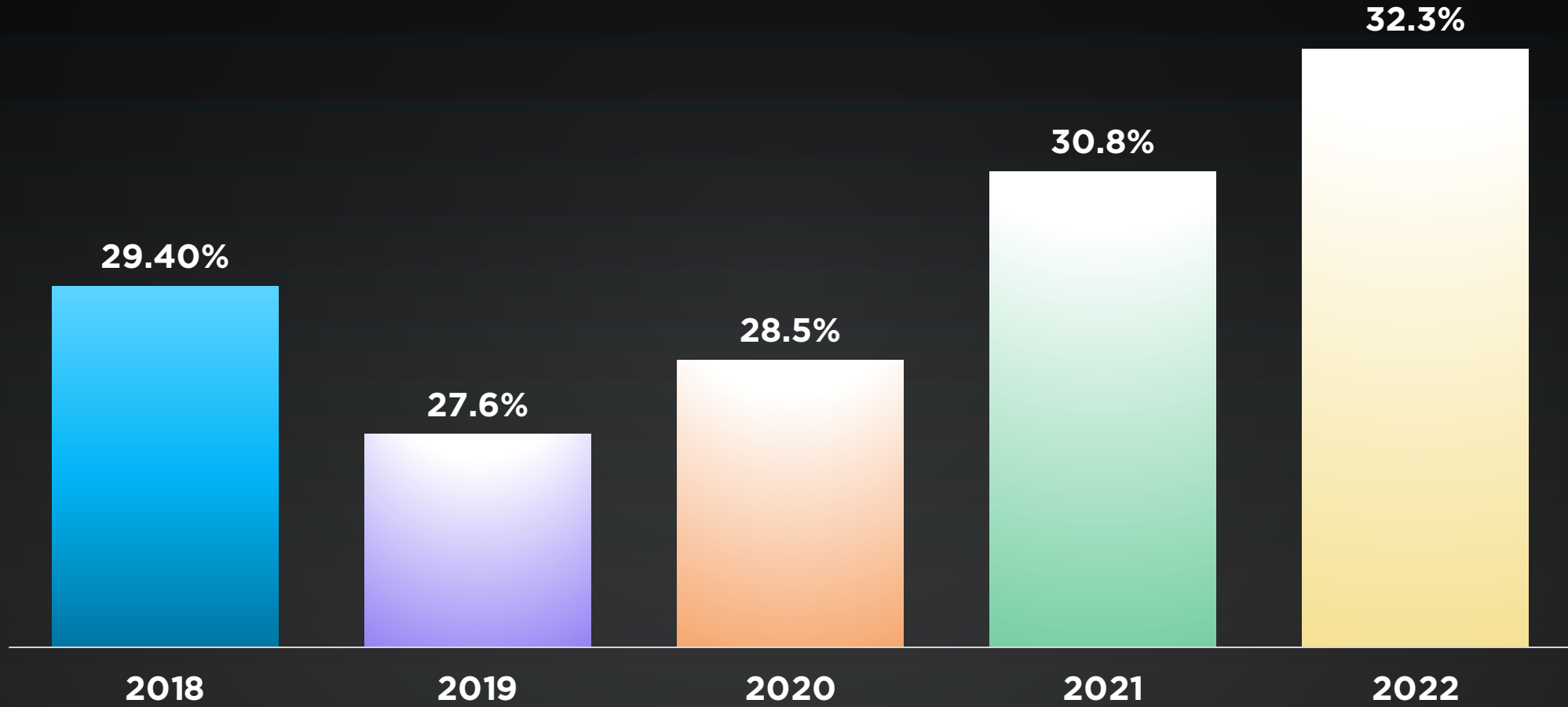


A DIVERSITY REPORT FOR THE ADVERTISING/ MARKETING INDUSTRY

NOVEMBER 2022

Diverse Representation

% Total Industry





A close-up photograph of a hand typing on a black computer keyboard. The background is dark and out of focus. Overlaid on the image is the text "Eliminating Online Hate" in white and "DRIVES GROWTH" in yellow.

Eliminating Online Hate
DRIVES GROWTH

ANA | ENGAGE
RESPONSIBLY

**Outstanding
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.”



The Good Feet Store

Doug Zarkin
Chief Brand Officer

ANA GROWTH AGENDA



Force for Growth
Force for Good



ANA

**2023 ANA
MASTERS OF
MARKETING**

**FORCE FOR GROWTH.
FORCE FOR GOOD.**

OCTOBER 24-27