



"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





"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



# A Time to Pause



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

# For Change



# Change

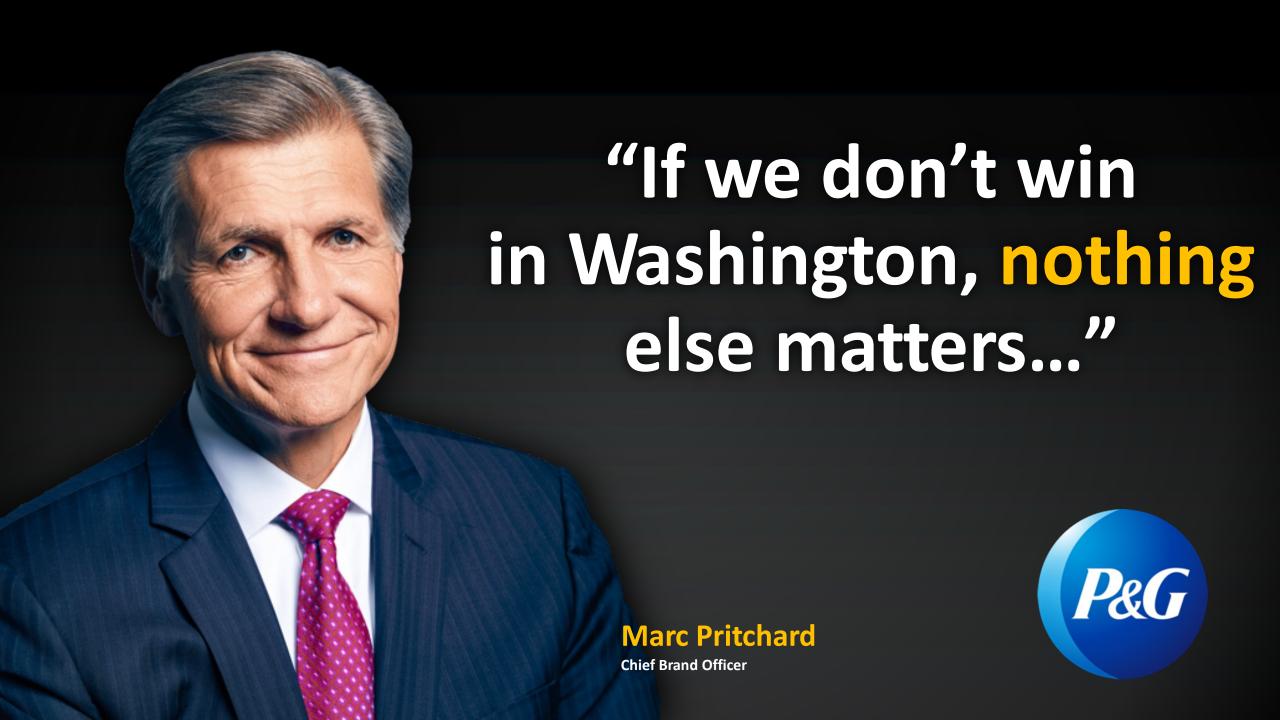
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- We will be successful when we eliminate systemic barriers.
- We have a responsibility to change the industry by prioritizing the importance of equitable investment, culture, and diverse marketing.

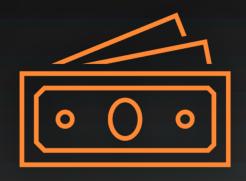




#### ANA POLICY AREAS OF INTEREST



**Privacy and Al** 



**Advertising Taxes** 



Postal and Direct Mail



First Amendment
/ Commercial
Speech

### UNITING THE INDUSTRY













AMERICANS FOR
DIGITAL OPPORTUNITY

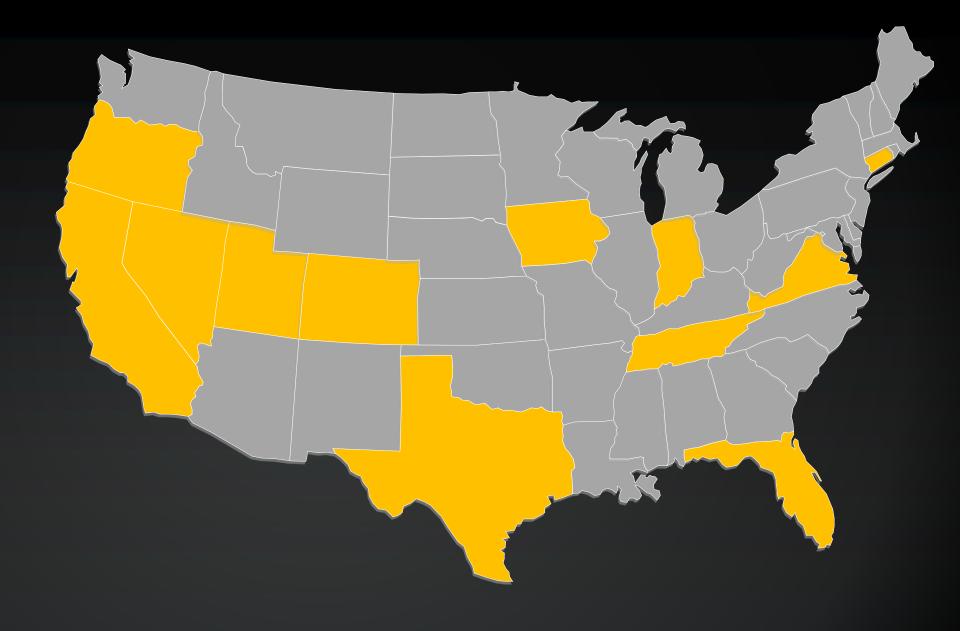
## LEGAL AND REGULATORY EFFORTS



- Privacy
- Endorsements and Testimonials
- Junk Fees
- Green Guides
- Fake Reviews
- Taxes
- Commercial Speech

#### STATE PRIVACY

States that have passed a comprehensive privacy law



### RECENT STATE ACTIONS

- As Congress has failed to act and pass a federal privacy law, the states have stepped in to act.
- This year alone 8 states passed comprehensive privacy laws.
- Additionally, numerous other states passed laws related to health data, children's data, and data brokers.



#### RESPONSIBLE **PRIVACY IN ADVERTISING** INITIATIVE



VENABLE

### OTHER KEY AREAS OF FOCUS

- Kids 13 or 18?
  - AADC Bills
- Social Media Bills
  - Utah SB 152
  - Arkansas SB 396





Global marketing companies and service providers: select ANA as your approved mediator and compliance provider for international data transfers.



Subscribe to ANA's data hygiene tools, which can save thousands of dollars in prospect promotional mailings while being responsive to consumers, building brand trust, and helping the environment.



ANA serves as one of the compliance arms to the Digital Advertising Alliance's interest-based advertising opt-out program. Contact staff with any compliance questions.

#### SELF-REGULATION



### ARTIFICIAL INTELLIGENCE

- Al Advertising Policy
- Developing Self-RegulationGuidelines
- Public Policy Working Group
- National Privacy Standard

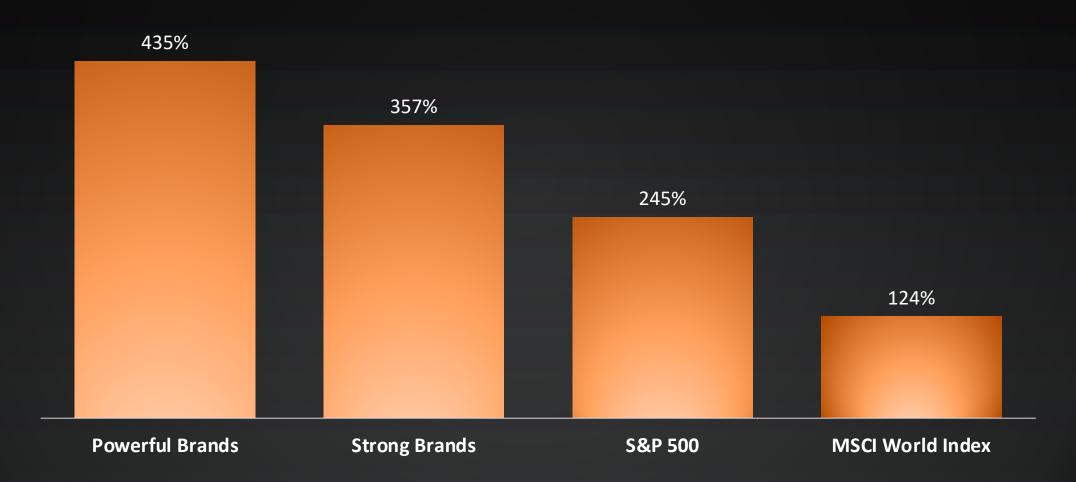
#### ANA GROWTH AGENDA



## Activating Brands DRIVES GROWTH

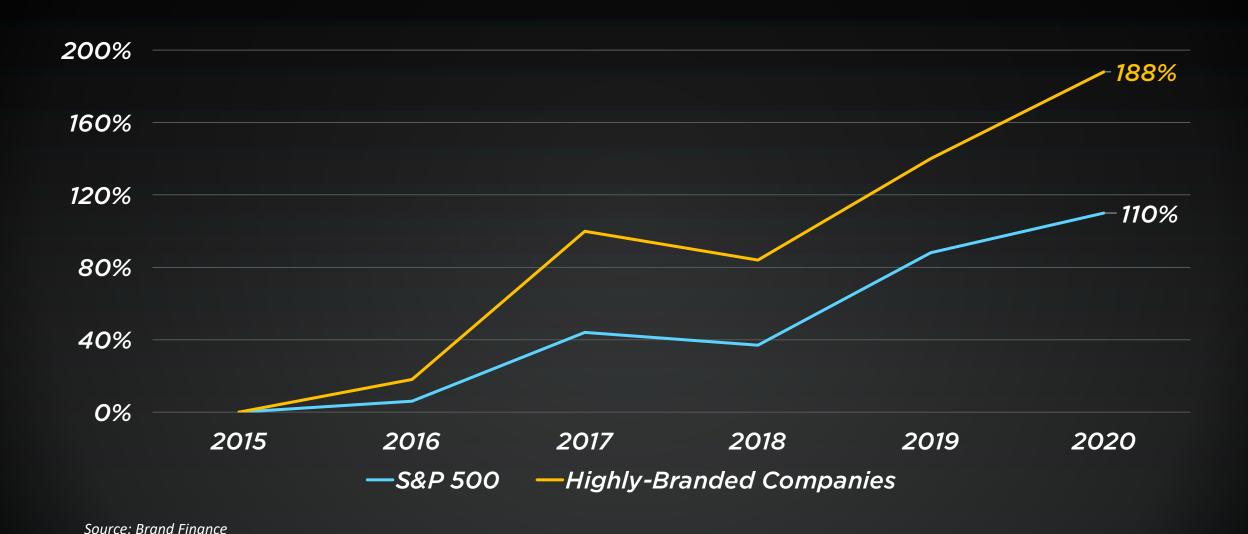
#### Strong Brands = Superior Returns

2006-2022



Source: Kantar BrandZ

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





### UNLOCKING BRAND GROWTH

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

### It begins with Creativity!!

# With a dose of Imagination

# Our industry needs so much more...

## Media Excellence DRIVES GROWTH

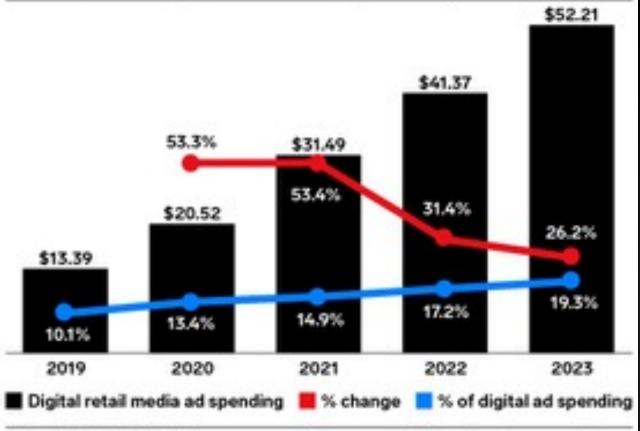
#### RETAIL MEDIA NETWORKS

\$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





- 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 Al**

#### The New Hork Times

A.L. and Charbella v. Encorne an A.I. Expert: Here Charllolle Work: Why Charlests Halb.comm? How to Non Charllotte.

THE SHIFT

#### GPT-4 Is Exciting and Scary

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

The Telegraph

Why a fake Pope picture could l of humanity

Silicon Valley heavyweights clash over the risks of super-power

PRACTICAL INSIGHTS

**How CMOs Can Lead the Way on ChatGPT** 

The Washington Post

Quiz: Did AI make this? Test yo knowledge.

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

#### FORTUNE

Bill Gates says the 'ag either reduce inequity

#### 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 SAVI MARKETING-OR MARKE

are of chiny objects



TS





on waste

ion Asymmetry

r access to data

**Campaign: 44,000** 

JUNE 2023

ANA.NET

# Superior Data Analytics DRIVE GROWTH

#### 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





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

### DEIB Measurement ADVANCES





# 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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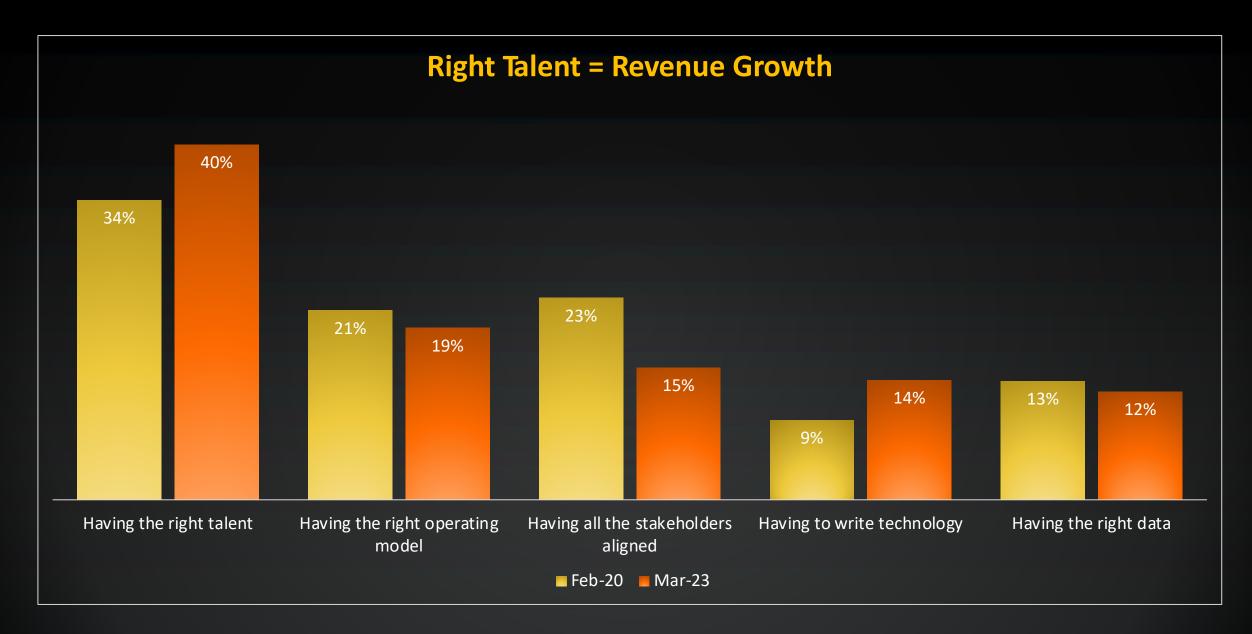






### A Digitally-Trained Workforce DRIVES GROWTH

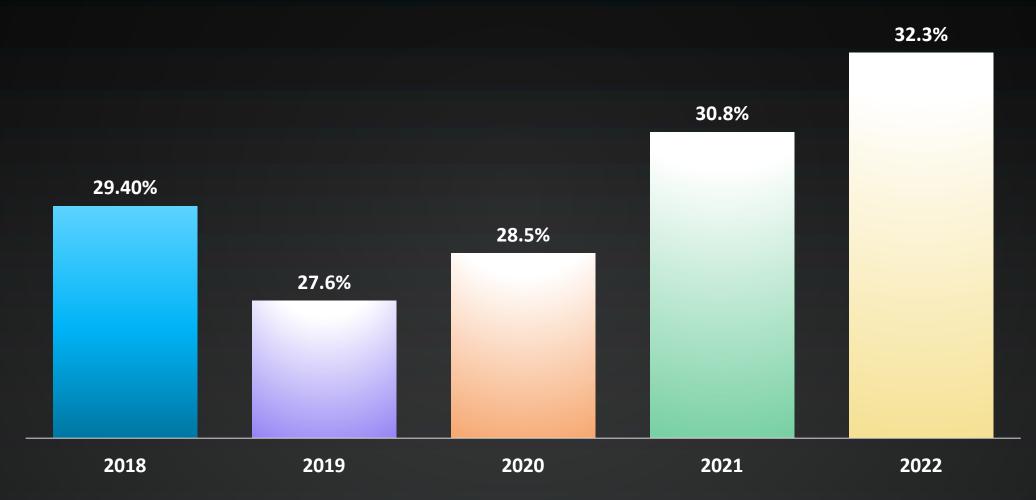




Source: The CMO Survey: Managing Brand, Growth, and Metrics Report: March 2023

#### Diverse Representation

% Total Industry







### Eliminating Online Hate DRIVES GROWTH

### ANA ENGAGE RESPONSIBLY

## Outstanding Leadership Drives Growth



- 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



#### ANA GROWTH AGENDA



