

ANA

**2020 ADVERTISING
FINANCIAL MANAGEMENT
CONFERENCE**

Bob Liodice
Chief Executive Officer



2020

A Tough Year

- COVID – 19
- Economy in free fall/partial recovery underway
- Racial Injustice
- **A time for healing and revival**

May 2020

**Report from the Global
Leadership Coalition COVID-19:
Turning leadership into action
during the pandemic**

WARC[^]

**CMO
GROWTH COUNCIL**
ANA **CANNES
LIONS**

ANA



HUMANITY FOR GROWTH



COVID-19 LESSIONS

“There is a human at the end of whatever it is you’re doing.”

Always have the human at the center of whatever you do.”

Amelia Dunlop
Chief Experience Officer

Deloitte.
Digital

**“Bring the love...
bring the authenticity.**

**Put your heart on the
table as much as you put
your wallet on the table.**

**Treat the consumer like
you treat your brethren.”**



Olivier François
Global President, Chief Marketing Officer







ANA/AIMM Commitment to Equality, Inclusion, and Systemic Change

from America's Marketers, Media Companies, Agencies, Production Companies, and Service Providers

At ANA and AIMM, we strongly believe that every person — regardless of race, ethnicity, sexual orientation, gender identity, ability, religion, age, or culture — should have equal rights, equal representation, opportunities, support, understanding, respect, consideration, voice, and the ability to achieve their full potential. For more than 20 years, we have used our collective voices, reach, and commitment to create an industry that is more inclusive, understanding, and reflective of diverse segments. Although we have done a lot, it is not enough.

As we experience unprecedented loss due to the novel coronavirus, Black and Brown communities continue to face an age-old virus that has infected America for four centuries: racism. As America marches for an end to racism, injustice, and inequality against Blacks, the marketing and advertising industry is here to say we see you, we hear you, we are with you, and we commit to do everything in our individual and collective power to end systemic racism and achieve equality and justice.

As marketers and industry leaders, we commit to unflinchingly examining our own history and current practices to shine a light on systemic and institutional biases that exist within the industry. We can no longer accept the shortcomings of many of our diversity and inclusion initiatives. We commit to examining why they haven't done enough and what action is needed to advance. And we commit to interventions that will have an immediate and sustained impact on equality, inclusion, and systemic change in our ecosystem and in our society.

- **We will achieve representation that better reflects our country's demographics throughout the industry:** marketers, media companies, agencies, production companies, and service providers. This means equity in representation at every level, access, and voice — in other words, a seat at the table. In our yearly diversity reports to the industry, we will include clear actionable steps and guidelines for companies to achieve parity and extend that work to the balance of the industry.
- **We will conduct courageous conversations and work with our membership's Employee Resource Groups (ERGs) to understand the systemic inequities throughout the industry** so that together we can establish programs that can fix these systems.



Be a force
for **good...**

and a
force for
growth.

MARC PRITCHARD

ANA Chairman & Chief Brand Officer

ANA GROWTH AGENDA





**Marketer's
Responsibility**

**“We make marketing
decisions....**

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

Doug Zarkin
Chief Marketing Officer

LUXOTICA[®]



But... are we making the
right decisions to
optimize growth?

History says... “No!!!”



**THE NEW
SHINY OBJECT
BUSINESS AND
BRAND GROWTH**

A one-percentage point change in industry growth can add, minimally, **\$500 billion** to sales over three years.

But... We're leaving a **ton** of
money on the table at the brand
and at the industry level.

**CMO's, CFO's, CEO's and
shareholders should
not be pleased**



Leaders Driving Growth





TAKING ACTION

Acknowledge the
issue/opportunity

Commit to change

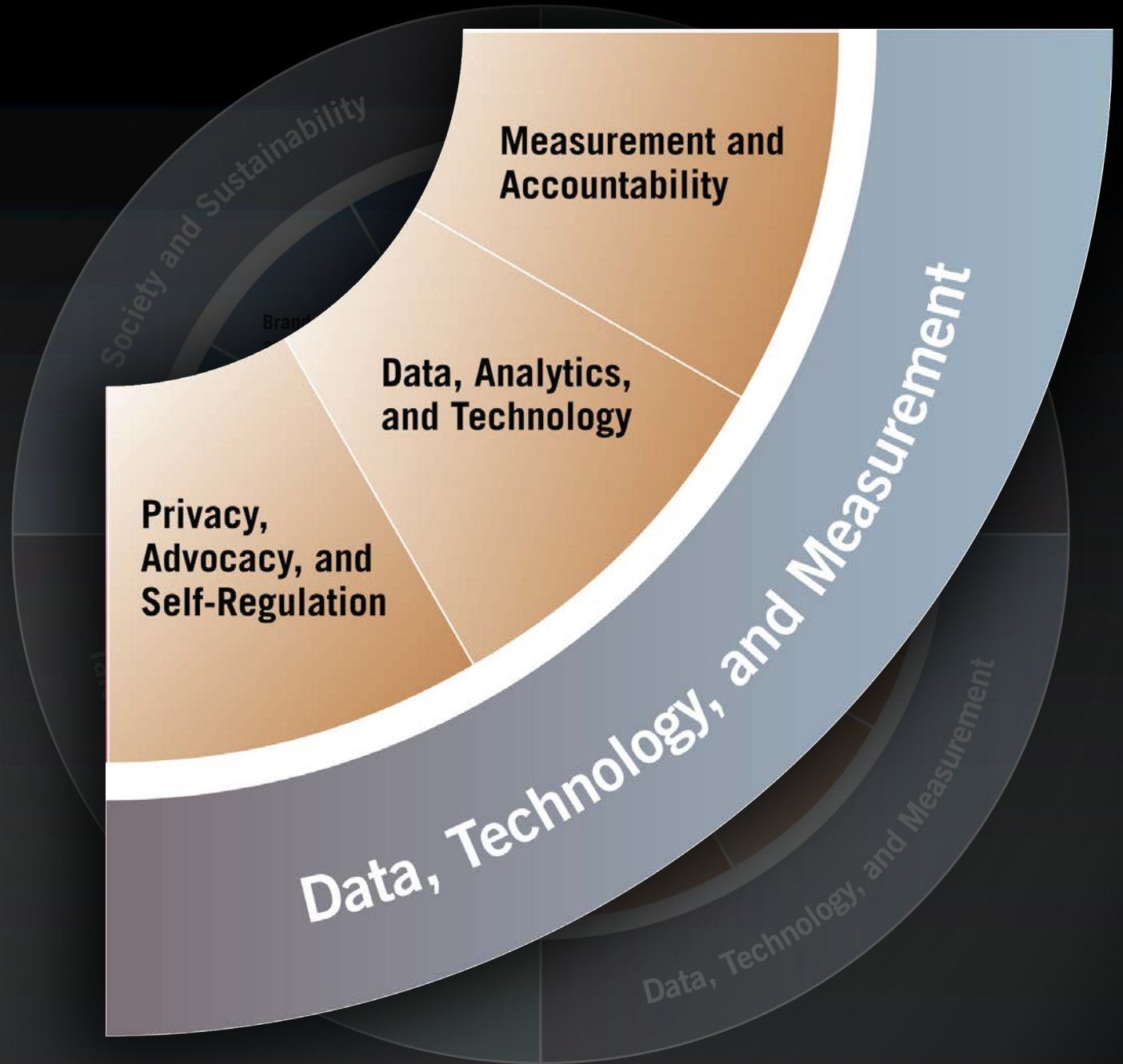
Engage the
“Business Machines”

ANA

ANA GROWTH AGENDA



ANA GROWTH AGENDA



CROSS-MEDIA MEASUREMENT

A hand holding a globe, surrounded by various icons representing different media and technology, such as a laptop, a smartphone, a camera, a globe, and a magnifying glass. The background is dark with glowing particles.

THE CROSS-MEDIA MEASUREMENT MISSION

- To create a marketer-centric cross-media measurement system for advertising providing complete measurement of all ad exposures
- Enables planning optimization, frequency management, and outcome measurement
- Ensure relevant and positive consumer ad experience

U.S. CROSS-MEDIA MEASUREMENT PARTICIPANTS

Google



Discovery
CHANNEL™

NBCUniversal

Turner

ANA

WARNER
MEDIA



CBS

Disney



FOX

ANA

PRIVACY & ADDRESSABILITY

To ensure the business community is effectively heard in this process, ANA, along with its sister ad trades, are jointly founding the Partnership for Responsible Addressable Media to convene working groups in four areas:

1. Business Practices
2. Technical Standards
3. Privacy, Policy, & Legal Considerations
4. Communications & Education



PARTNERSHIP FOR RESPONSIBLE ADDRESSABLE MEDIA

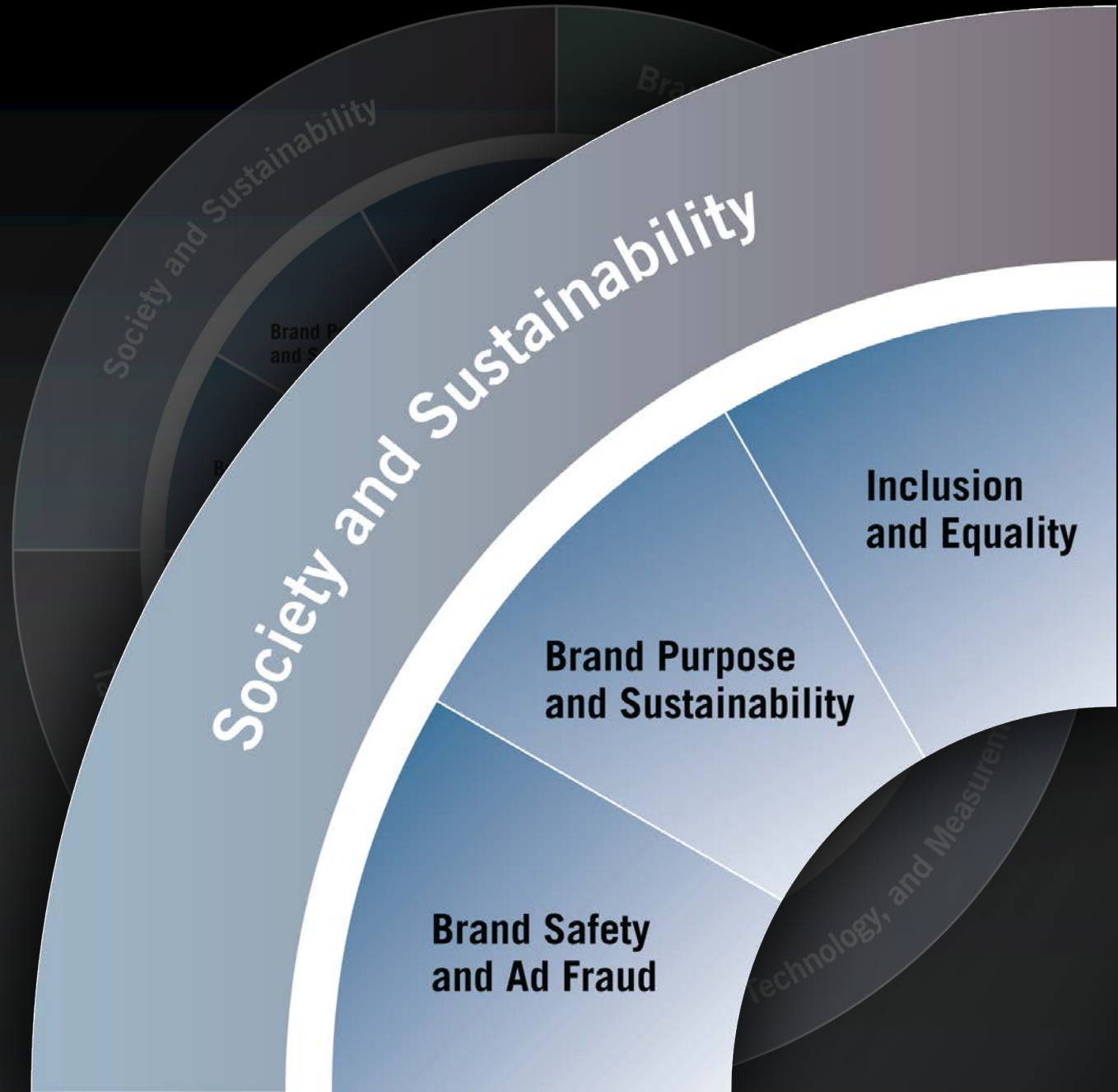


ANA

ANA GROWTH AGENDA



ANA GROWTH AGENDA



Eliminate
HATE and
HARMFUL SPEECH

GARM Brand Safety Floor + Suitability Framework

•June 2020



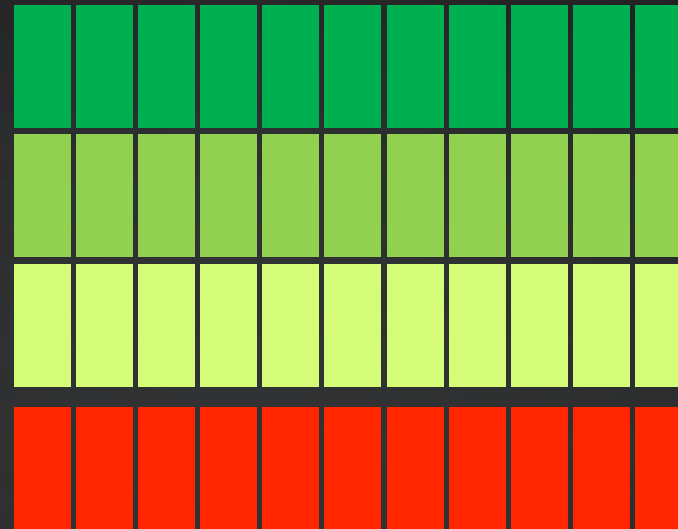
ADVANCING SHARED LANGUAGE + DEFINITIONS

How it works conceptually

Sets a series of 11 topic areas

Establishes a Safety Floor
a limit that is not suitable for advertising support

Creates a Suitability Framework
graded definitions of topic treatments for advertising support



Suitability Framework

1. Adult & Explicit Sexual Content
2. Arms & Ammunition
3. Crime & Harmful acts to individuals and society
4. Death & Injury
5. Online piracy
6. Hate speech & acts of aggression
7. Obscenity and Profanity
8. Illegal
Drugs/Tobacco/eCigarettes/Vaping/Alcohol
9. Spam or Harmful Content
10. Terrorism
11. Debated Sensitive Social Issues

Safety Floor

- Excluded from monetization
- Few exceptions for availability



EQUALITY AND INCLUSION

AD FRAUD



ANA GROWTH AGENDA



ANA GROWTH AGENDA





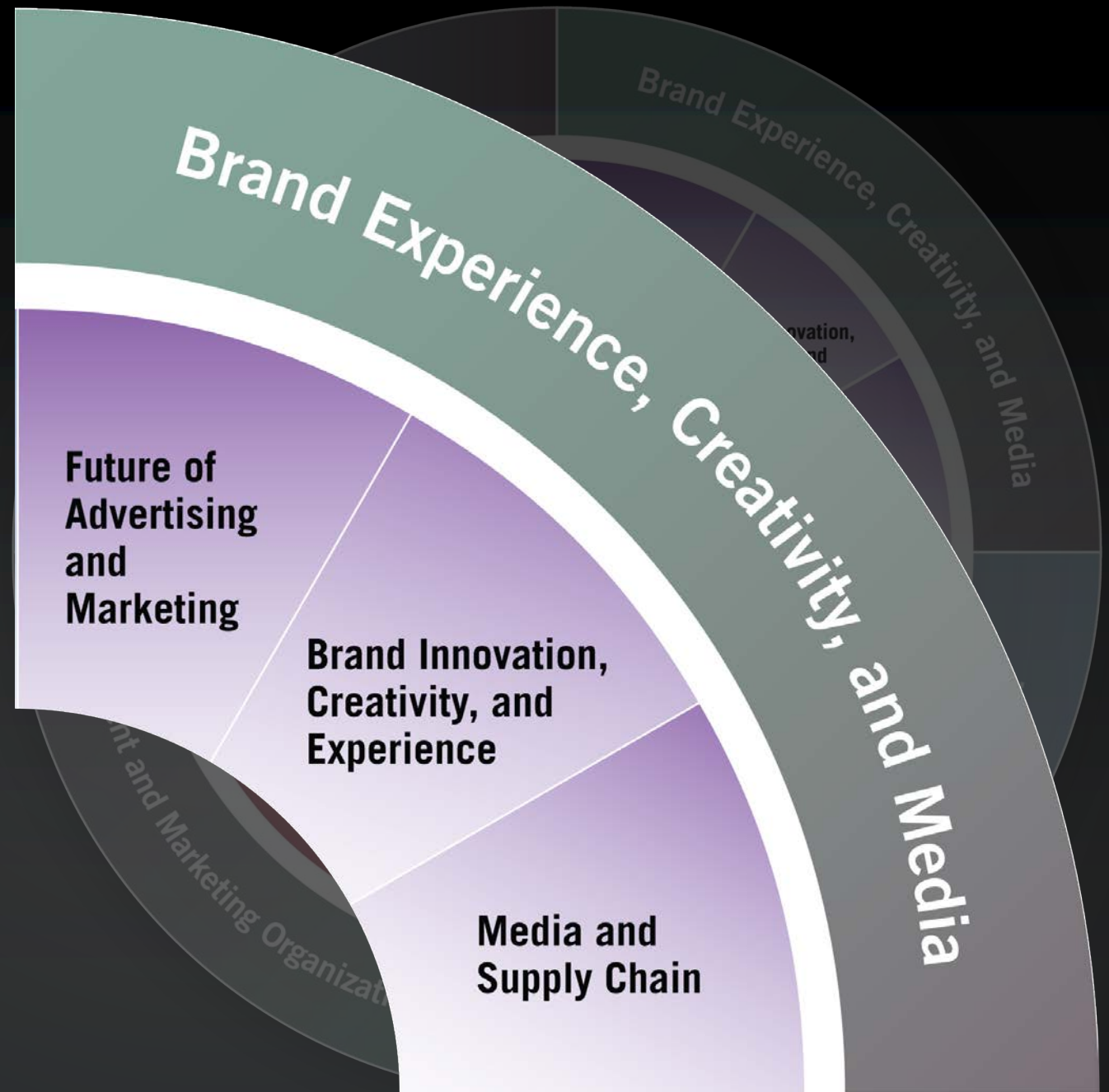
THE ANA
EDUCATIONAL
FOUNDATION



ANA GROWTH AGENDA



ANA GROWTH AGENDA



MEDIA TRANSFORMATION AND REFORM



Cross-Industry Task Force

The Upfront

Equality

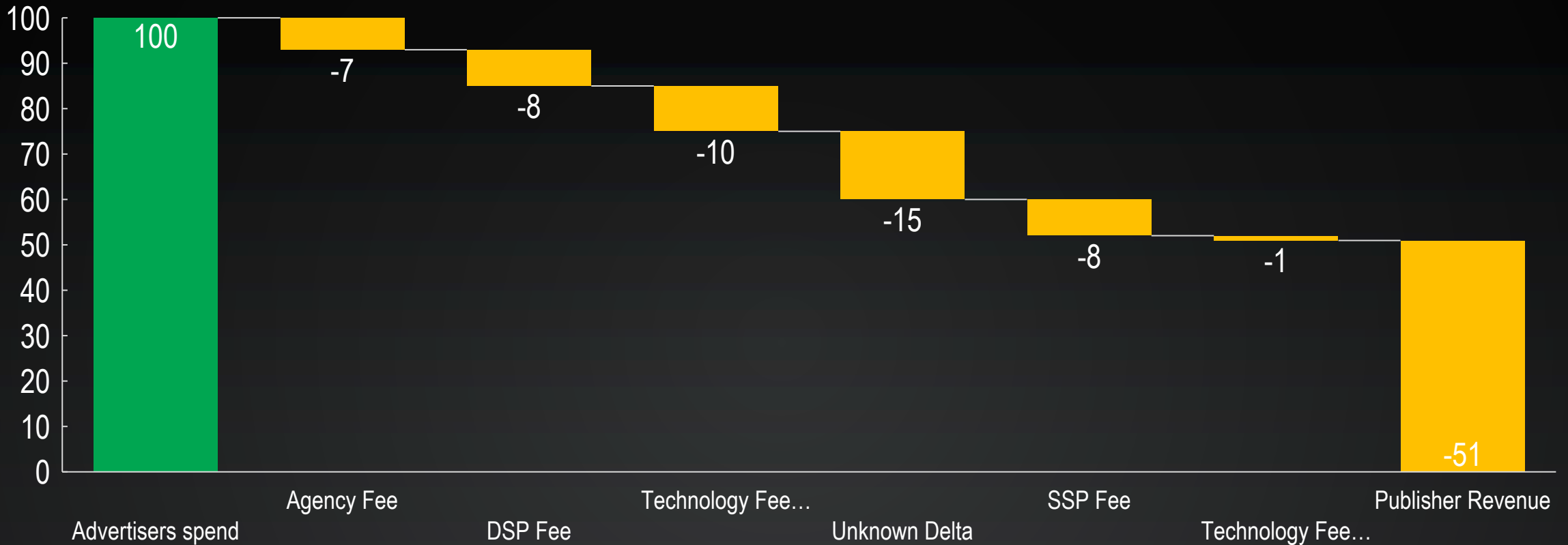
Open AP

KPI's

Commercial Load

PROGRAMMATIC MEDIA TRANSPARENCY

Cost to Brands: \$20 Billion



Brand Suppliers: 25%

Publisher Suppliers: 8%

Unknown: 15% (@ 1/3 of the supply chain providers)

GLOBAL COLLABERATION

ANA

I S B A

WFA

World Federation
of Advertisers



HUMANITY FOR GROWTH

BRANDS FOR HUMANS





Be a force
for **good...**

and a
force for
growth.

MARC PRITCHARD

ANA Chairman & Chief Brand Officer

ANA

**2020 ADVERTISING
FINANCIAL MANAGEMENT
CONFERENCE**

Bob Liodice
Chief Executive Officer

