

ANA



2019 ANA Advertising Law & Public Policy Conference

Bob Liodice

Chief Executive Officer

Brands

“The world really needs brands.
Brands help the world
move forward.”

George Hammer
Chief Content Officer



ANA

Brand Growth

Interbrand

“The brands that are growing the fastest today are those that intuitively understand their customers...
... and make brave, iconic moves that **delight and deliver** in new ways.”

Charles Trevail
Global Chief Executive Officer



Brand Imperatives and Value Shifts

- ...from ensuring consistency to stimulating desire
- ...from marketing centric to enterprise centric
- ...from creating functional and emotional differentiation to changing a way a business goes to market
- ...from communicating the consumer experience to actually shaping it

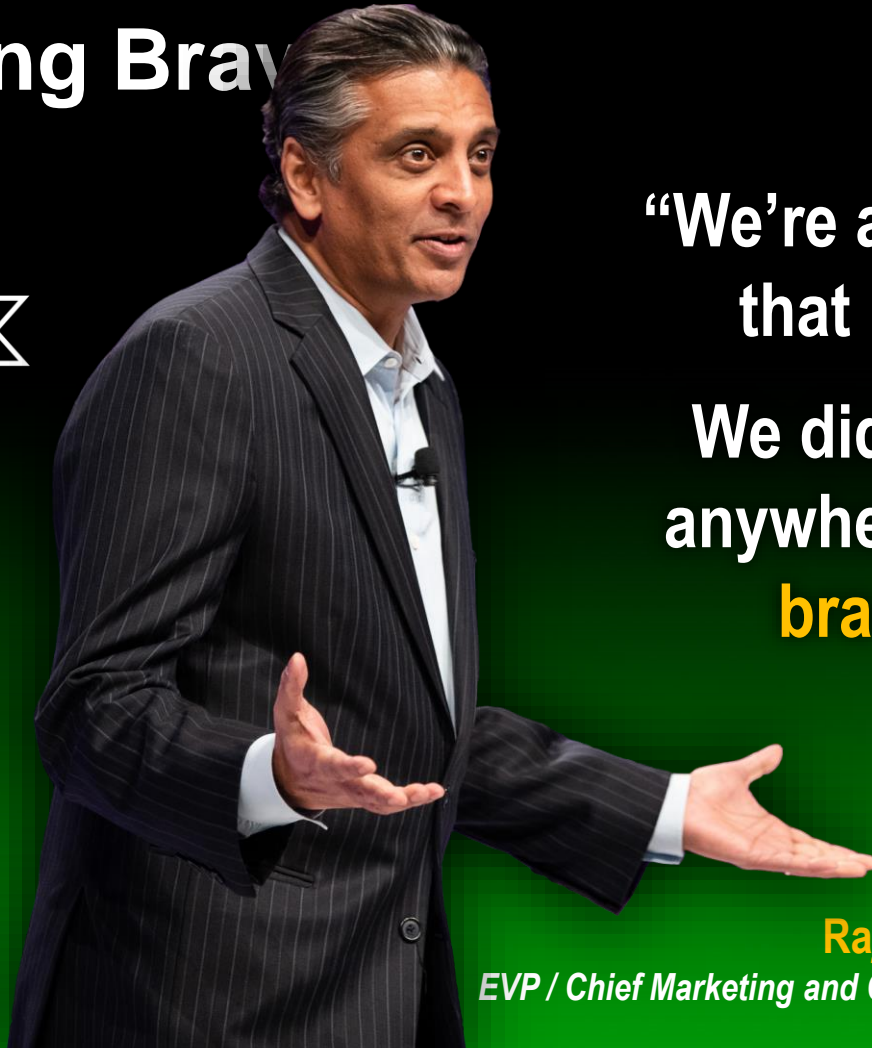
Source
Interbrand Best Global Brands 2018



Conclusion

*The World's Leading Brands
Are Activating Brave*

Activating Brav

The FedEx logo is displayed in white on a dark background. It consists of the word "Fed" in a bold, sans-serif font, followed by "Ex" in a similar font with a white outline. The "E" in "Ex" is stylized with a white outline and a small gap at the top.

“We’re always looking for that universal idea.

We didn’t have to look anywhere **but inside our brand** to find it.”

Rajesh Subramaniam
EVP / Chief Marketing and Communications Officer

The ANA logo is in white, featuring the letters "ANA" in a bold, sans-serif font. The "A" is slightly larger and more prominent than the "N" and "A".

Activating Brave

PROGRESSIVE[®]

Be brave...

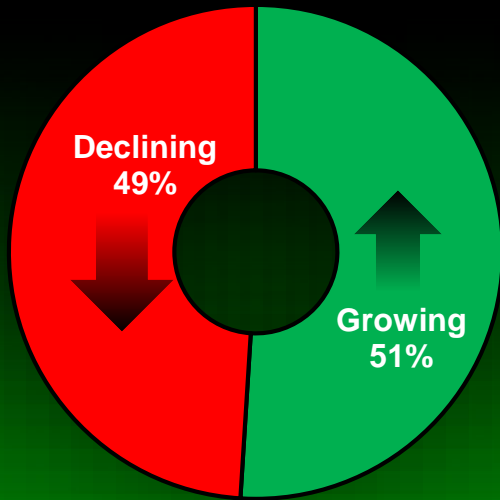
... take more risks.

Jeff Charney
Chief Marketing Officer

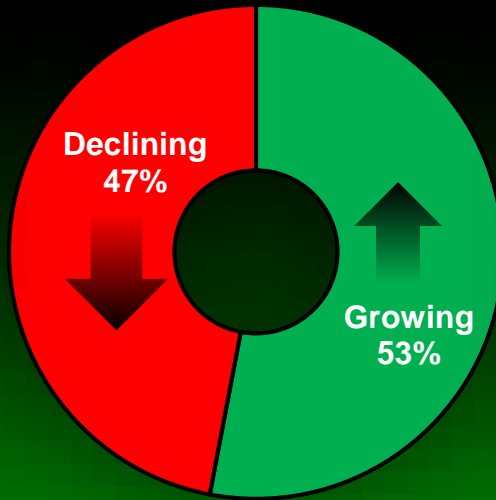
ANA

Marketers Generating Insufficient Growth

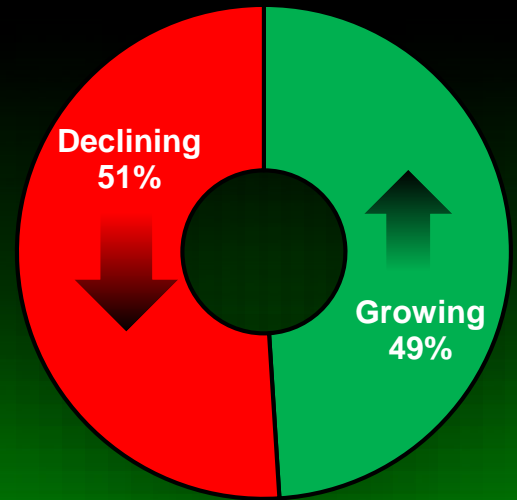
2016



2017



2018



Fortune 500 – 2016-18 After Tax Profits



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.



The CMO Twelve-Point Strategic Agenda



*"Activate Brave"
for the Industry
to drive Ecosystem Growth*

Leadership – Ad Fraud & Brand Safety



Leadership - Privacy



DIGITAL
ADVERTISING
ALLIANCE

Leadership – Self Regulation

ASRC

A red triangle pointing upwards and to the right, positioned at the end of the ASRC text. A small 'TM' trademark symbol is located at the top right corner of the triangle.

A service of the advertising industry and Council of Better Business Bureaus

ANA

Leadership - Ad Taxes

Saving \$25-35 billion



Daily Mail .com

Home | U.K. | News | Sports | U.S. Showbiz | Australia | Femail | Health | Science | Money

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'Delete Facebook NOW': WhatsApp co-founder accuses Mark Zuckerberg of trading privacy for revenue after allowing ads on the platform

TE

British Airways customer data stolen in data breach

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Zack Whittaker @zackwhittaker

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The Guardian

Samsung's voice-recording smart TVs violate privacy law, campaigners claim

The Register
Biting the hand that feeds IT

620 million accounts stolen from 16 hacked websites now for sale on dark web, seller boasts

The New York Times

Anthem Hacking Points to Security Vulnerability of Health Care Industry

What to do if you're affected by the Marriott data breach

REUTERS Business Markets World Politics

Cathay Pacific faces probe over massive data breach

FORTUNE

NASA Reveals Data Breach Exposed Employee Personal Information

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Forbes

What Is General Data Protection Regulation

The Guardian

What is GDPR and how will it affect you?

HUFFPOST

Why GDPR Will Fast Track the Fourth Industrial Revolution

MARTECH TODAY

GDPR-ready? How US email marketers avoid hefty new EU fines

CNN BUSINESS

Markets Tech Media Success Perspectives Video

These companies are getting killed by GDPR

CNBC

Everything you need to know about a new EU data law could shake up big US

HUFFPOST

You Probably Don't Know These Consumer Laws — But You Should

INVESTOR'S BUSINESS DAILY

Facebook Risk From Europe's Data Protection Rules Bigger Than Google's

Bloomberg

Technology

GDPR Is Here: Mess Up and We'll Fine You, Says Privacy Chief

CNN BUSINESS

Markets Tech Media Success Perspectives Video

GDPR is here: What you need to know about Europe's new data law

FORTUNE

GDPR

These U.S. Media Sites Have Gone Dark in Europe as New GDPR Rules Kick In

THE WALL STREET JOURNAL

CIO JOURNAL

Companies Scramble to Cope with New EU Privacy Rules

TheStreet

Complying With GDPR Could Be Costly for Facebook, Google and Other Tech Giants

TheStreet

INVESTOR ALERT

Join Us April 6 in New York as 16 Experts Teach You How to Save for Retirement

Home / Investing / Stocks

Complying With GDPR Could Be Costly for Facebook, Google and Other Tech Giants

The New York Times

Tech Giants Brace for Europe's New Data Privacy Rules

FINANCIAL TIMES

Information wars: How Europe became the world's data police

CNBC

MARKETS BUSINESS INVESTING TECH POLITICS CNBC TV

Blocking new data privacy rules — and need to do about it

THE WALL STREET JOURNAL.

Businesses Blast California's New Data-Privacy Law

KPIX CBS SF BayArea NEWS WEATHER SPORTS BEST OF VIDEO MORE

Californians May Be Allowed To Sue Companies For Violating Privacy Protections

INVESTOR'S BUSINESS DAILY®

Following California's Lead Would Balkanize U.S. Online Privacy Rules

Bloomberg

California's Toughest-in-U.S. Privacy Law May Get Even Stricter

California passes strictest online privacy law in the country

CNN BUSINESS Markets Tech Media Success Perspectives Video

THE WALL STREET JOURNAL.

TECH
California Passes Sweeping Data-Privacy Bill

The New York Times

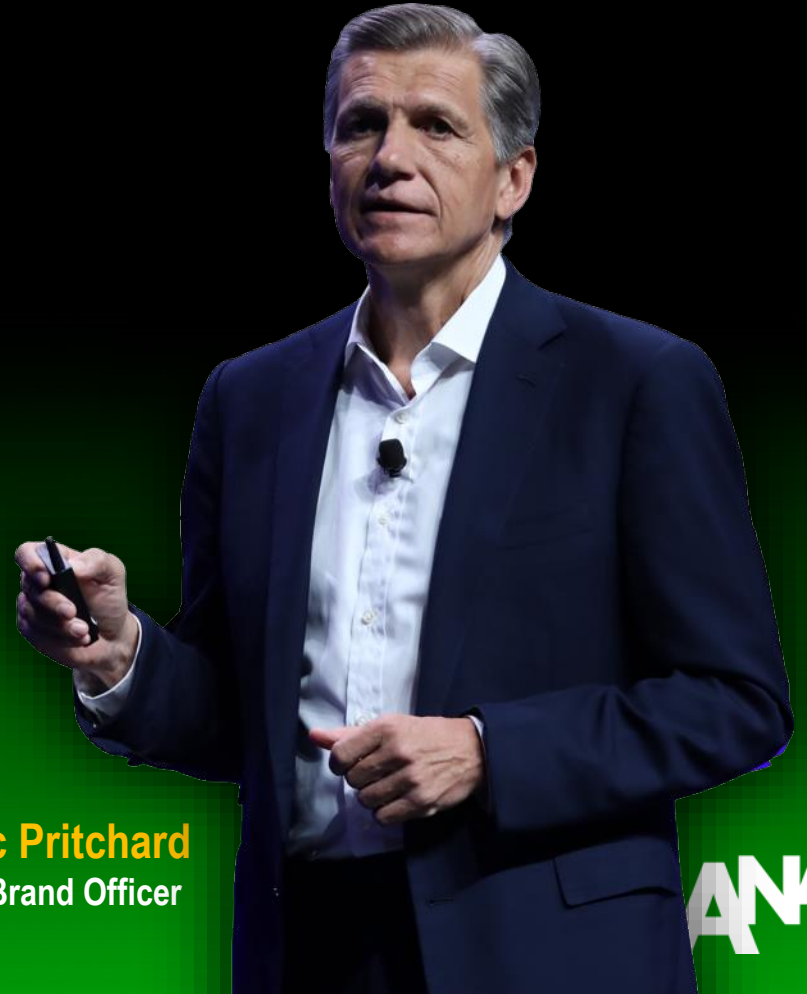
California Passes Sweeping Law to Protect Online Privacy

CNN BUSINESS

California residents could sue companies for violating privacy protections

ANA

**“If we fail in
Washington...
... nothing else
matters.”**

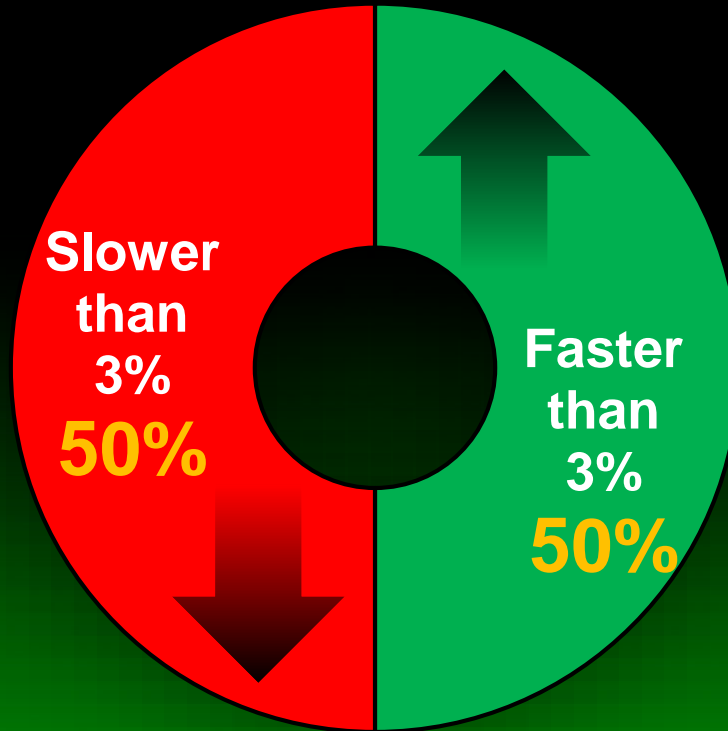


Marc Pritchard
ANA Chairman and Chief Brand Officer



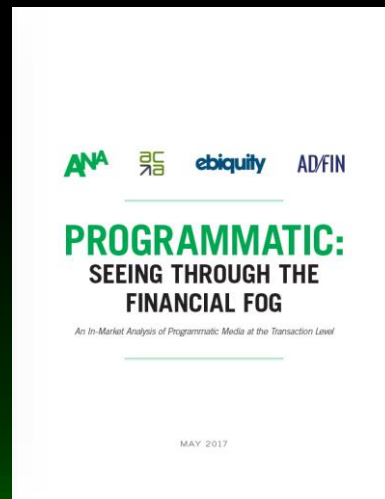
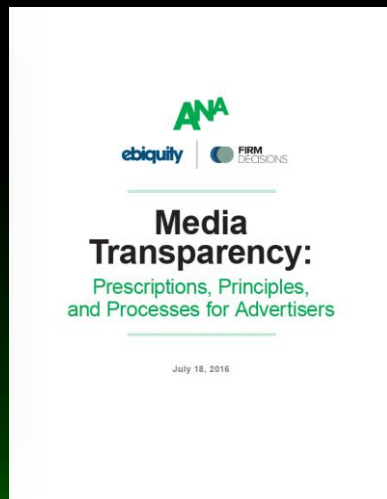
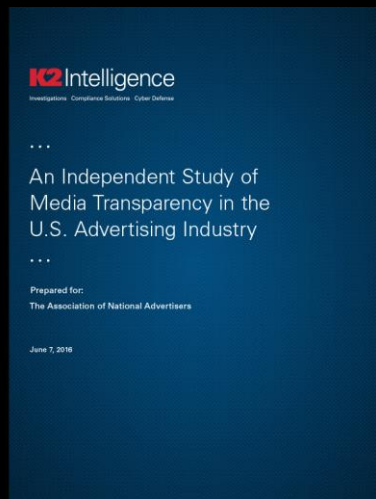
The New Paradigm
Privacy Coalition

Inadequate Brand Value Growth



Source
Interbrand Best Global Brands 2018

Inadequate Transparency



Proliferation of Ad Fraud

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BOT BASELINE 2016-2017

FRAUD IN DIGITAL ADVERTISING

- Demand Transparency for Sourced Traffic
- Refuse Payment on Non-Human Traffic in Media Contracts
- Avoid Excessive Restrictions
- Encourage MRC Accredited Third-Party Fraud Detection on Walled Gardens
- Create and Implement Blacklists



Challenged Talent Pipeline



BRIDGING
THE
TALENT
DISCONNECT:
CHARTING
THE
PATHWAYS
TO
FUTURE
GROWTH

aef THE ANA
EDUCATIONAL
FOUNDATION

BY ELLIOT LUM,
Vice President, Talent Strategy and Program Development

Marketing Organization Shortfalls



Inadequate Measurement



nielsen



Everybody Governs..

Nobody Governs..



comSCORE®



Confusion

DISPLAY LUMAscape



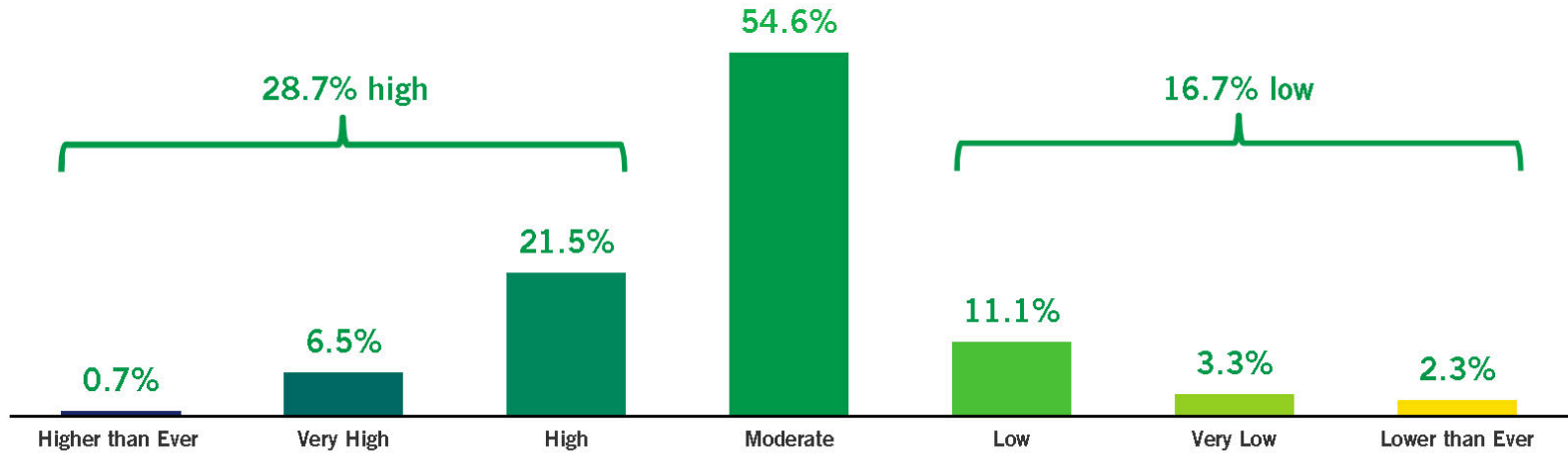
Red dashed box: Denotes acquired company

Blue dashed box: Denotes shuttered company

© LUMA Partners LLC 2016



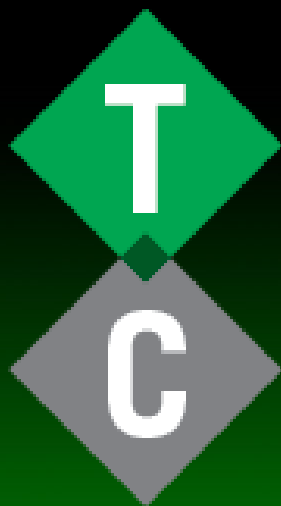
TRUST



How would you characterize the current level of trust between client-side marketers and advertising agencies?

Base: 306





The ANA

Trust Consortium

Restoring Trust through Transparency,
Integrity, and Growth

ReedSmith

**Driving progress
through partnership**

ANA

**“We need to push for
brand action. It is our duty
to advocate for a higher purpose
as marketers.**

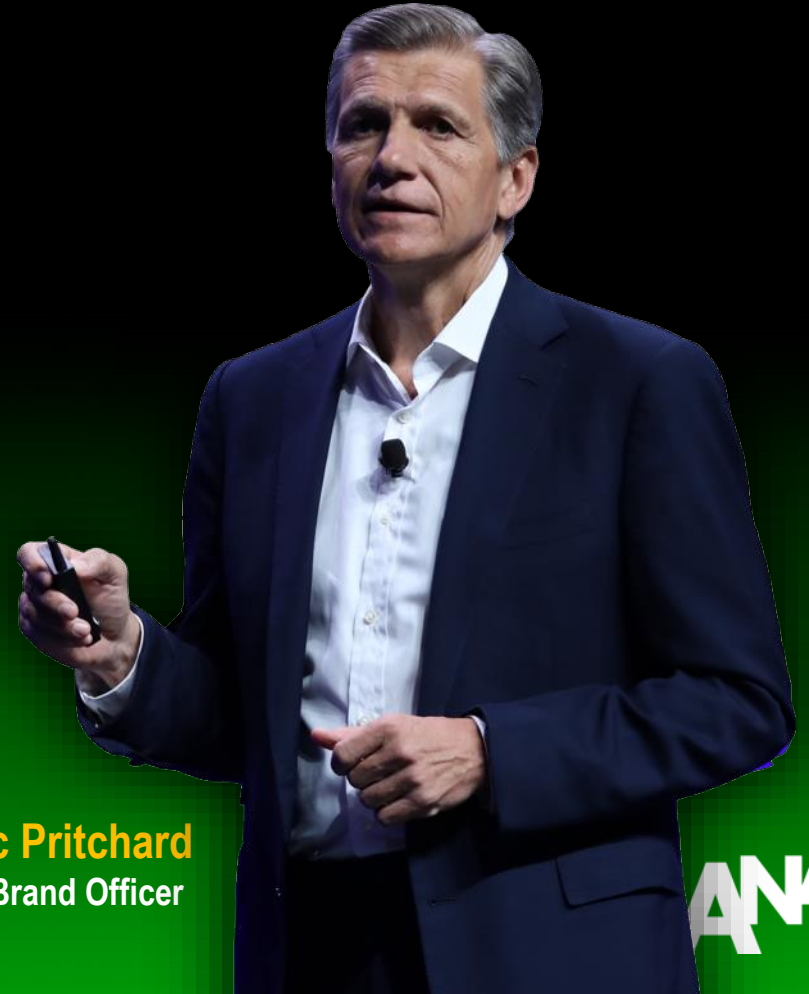
**We are the heartbeat of our
companies.”**



Amanda Brinkman
Chief Brand and Communications Officer



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



Marc Pritchard
ANA Chairman and Chief Brand Officer



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Bob Liodice

Chief Executive Officer