Lead the industry and advance marketers’ success by:

• Championing marketing excellence and collaborative mastery

• Shaping the future of marketing
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“We are ready to deliver what our members need: marketing excellence and an organization that will shape the industry’s future.”

— Bob Liodice
Dear ANA Members, Friends, and Industry Colleagues,

2013 was one of the most successful years in ANA history. Across every benchmark and measurement, we met or exceeded expectations. We generated substantial business and leadership momentum, and our progress is coming at increasing rates.

This upbeat assessment is sourced from several fundamental areas:

- **Substantial growth in our industry leadership agenda across all platforms.** The ANA’s leadership in areas such as marketing organization, agency relations, talent negotiations, advertising taxes, privacy, self-regulation, industry measurement, online piracy, and patent trolling has become an integral part of our growing legacy. Whenever there is an industry issue or opportunity, the question always seems to be: Is the ANA involved? This is a clear testament to the ANA’s overarching strength and ability to bring positive change to our ecosystem.

- **Extraordinarily healthy business operations.** The ANA’s strength is grounded in a core of “growth.” And that growth is a reflection of our devotion to quality. That is why every ANA product and service is growing, and why membership engagement continues to hit new highs. As such, total membership continues to expand, with 2013 growth of more than 13 percent. Financially, our operating income exceeded $2 million for the fourth consecutive year, reaching a record high of $2.8 million in 2013. These resources are redeployed to fuel future membership satisfaction, to expand products and services, and to pursue targeted leadership initiatives — all of which elevate our prospects for long-term growth and overall membership success.

- **Bolder business strategies for long-term success.** The ANA continued to expand its reach, as members want us to fulfill evolving expectations across a wide, diverse, and complex ecosystem. To do that, we broadened our business model. We now look to external partners for marketing intellectual capital while concurrently pursuing initiatives to strategically strengthen our portfolio. We want to build new operating models and consistently sharpen our focus to meet the changing needs of our membership. This requires increasing quality and levels of staff, investments in technology, improvements in marketing and communications, and an expansive strategic approach. Our members have benefitted materially through:
  - The addition of Effie and Mobile Marketing Association case histories to our marketing capital
  - Our collaboration with MarketShare and the addition of the Marketing Analytics Leadership Award
  - Our partnership with The Internationalist 1000, expanding our global marketing coverage
  - The delivery of valuable marketing tools and templates via Demand Metric
  - The incredible outcome of our partnership with EffectiveBrands to bring one of the most storied studies to our industry, Marketing2020
  - The unique insights and marketing perspectives of our Strategic and Thought Leadership partners

We are very proud of our accomplishments, and look forward to addressing the challenges before us. We are ready to deliver what our members need: marketing excellence and an organization that will shape the industry’s future. We believe we have the membership strength, financial resources, and leadership platforms to accelerate our momentum even further. We are excited about working with our friends to advance the industry and bring continued growth to all our members in 2014.

Bob Liodice | President and CEO
The ANA wraps up its 103rd year of service to the marketing community on a strong operational and financial footing — a footing that provides us with the resources to advance the interests of marketers and empower them to shape the future of marketing.

The ANA actively supports members by helping them identify the insights, tools, and industry forums that enable them to become leaders in marketing excellence. This support comes to life via a wide range of products and services:

- The richest content library in the industry, with more than 8,000 research reports, case studies, insight briefs, and other carefully curated content items to keep marketers fully informed on the latest trends, best practices, and growth opportunities
- Market-leading collaborative forums like the annual Masters of Marketing Conference; our major national conferences on topics like media leadership, real-time marketing, and multicultural marketing; and targeted discipline-specific committees where members can meet their peers and tackle topics of immediate professional interest

We address this mission through a resolute focus on two core principles: value and quality. Creating value at all points of contact — from our member companies to our partners to the marketing industry as a whole — allows us to deliver on those guiding principles.

As part of our focus on service, the ANA continually looks for opportunities to support the overall industry, whether addressing concerns over Internet domain names, helping lead talent payment negotiations, defeating advertising tax legislation, or improving the marketing supply chain. These initiatives benefit everyone — clients, agencies, and service providers alike.

2013 has been our strongest year on record, both financially and operationally. We exceeded our goals in terms of membership growth, member engagement, and member satisfaction. And once again, our strong performance was driven by the outstanding execution of our employees, deeper relationships with our members and partners, and a broadening portfolio of products and services.

During the year we made investments in new products and services, added additional staff to support our member-facing services and industry initiatives, and expanded and revitalized our office and technology infrastructure. Our philosophy is to reinvest in our products and services, and that will continue in the coming year. We will also continue to fund a variety of industry leadership initiatives that support cross-functional needs, such as measurement and consumer privacy.

Our focus in 2014 is simple: carry on our strategy to advance marketing excellence through the leadership insights, collaboration, training, and services that our members and the overarching marketing industry need to succeed.

Christine Manna  |  COO and CFO
Corporate Highlights

“The ANA actively supports members by helping them identify the insights, tools, and industry forums that enable them to become leaders in marketing excellence.”

— Christine Manna
2013 Overview

ANA membership achieved two historic milestones in 2013. First, we acquired a record 69 net new member companies, increasing the ANA’s size to 570 corporate members — a size that seemed unimaginable only a few short years ago. The ANA continues to be valued as a marketing resource for all segments of the client-side marketing industry, as member companies large and small are provided with the same level of high-quality service.

Second, we established an all-time high in unique member engagement. Our members took advantage of ANA benefits and privileges such as access to proprietary insights and research, peer-sharing meetings and workshops, extensive networking opportunities, practical skill development programs, leading industry conferences, and advocacy. More than ever, members have come to rely on the ANA to provide the marketing insights they need to make better marketing decisions and build their brands. B-to-B segment marketers are also benefiting from the ANA’s proven, practical, and easy-to-access marketing insights.

As the marketing landscape continues to become more complex, so do the needs and demands of our members. We’ve continued to invest in the tools, technology, and personnel to allow for quick and easy access to the right insights at the right time. In 2013, nearly 16,000 marketers (an increase of 18 percent versus a year ago) tapped the ANA to find the knowledge and resources they needed.

What were they looking for? More than two-thirds of our members consumed case histories, research studies, and peer-to-peer insights on what works and what does not; more than half found the ANA’s School of Marketing to be an efficient and effective way to build and develop the team’s internal capabilities and skill sets; and one-third turned to the ANA because of our top-flight conferences.

Of course, there is no finer or more respected marketing conference than the ANA Masters of Marketing. The 2013 event attracted more than 2,000 attendees — a record. This conference showcases the world’s leading CMOs and other top thought leaders. Nowhere can marketers learn more, connect more, or gain more insights into what drives a successful growth agenda.

The ANA’s growing portfolio of best-in-class products and services is matched by our relentless dedication to servicing our members. The ANA experience begins and ends with you, the member. This is further exemplified by the high member satisfaction and quality scores we achieve. The ANA continues to rank among the highest U.S. companies in this category, and we never stop trying to improve our performance year over year.

Judging from the growth of our membership, usage of ANA products and services, and our continued high satisfaction scores, the ANA is a resource and partner that marketers can count on to build their knowledge, capabilities, and brands.

Christine Manna  |  COO and CFO
Did You Know?

- We gained our first member in South Dakota in June: the Edith Sanford Breast Cancer Foundation.
- The state that gained the most members in 2013 was California, with 21.
- Members Alaska Airlines and Walt Disney Parks and Resorts teamed up with Disney-themed planes for flights between Seattle and Orange County.
- Members King’s Hawaiian Bakery West and Arby’s partnered to launch new sandwiches using King’s Hawaiian buns.
- In February, Hasbro held a social-media-based public vote that allowed fans of Monopoly to choose a new board game piece and eliminate another. The new token is the cat, and the retired token is the iron. Other pieces in the running included a robot, a diamond ring, a helicopter, and a guitar.

Throughout the year, members received more than 600 pieces of proprietary marketing content, including case studies, best practices, and marketing tools, through the ANA’s daily email communications.

ANA’s membership crosses 35 industry categories. The top 15 are:

1. Financial/insurance (93)
2. Food/beverage (50)
3. Technology (38)
4. Health care (35)
5. Consumer goods/products (34)
6. Pharmaceutical (27)
7. Travel/leisure (27)
8. Professional services (26)
9. Restaurant/fast food (25)
10. Retail (24)
11. Consumer products/durables (23)
12. Entertainment (18)
13. Automotive (16)
14. Alcohol and tobacco (15)
15. Telecommunications (13)
Collectively, these 10 companies have been ANA members for nearly 1,000 years:

<table>
<thead>
<tr>
<th>Company</th>
<th>Join Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevron</td>
<td>July 7, 1911</td>
</tr>
<tr>
<td>Coca-Cola</td>
<td>September 2, 1911</td>
</tr>
<tr>
<td>Kodak</td>
<td>January 2, 1912</td>
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<tr>
<td>Johnson &amp; Johnson</td>
<td>February 1, 1912</td>
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<td>P&amp;G</td>
<td>May 1, 1913</td>
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<td>General Electric</td>
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<td>ExxonMobil</td>
<td>May 1, 1916</td>
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<tr>
<td>Johnson</td>
<td>May 1, 1917</td>
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<tr>
<td>Unilever</td>
<td>August 1, 1919</td>
</tr>
<tr>
<td>Chrysler</td>
<td>May 1, 1920</td>
</tr>
</tbody>
</table>
Member satisfaction is at extremely high levels

“Meet/exceed expectations” “Engage again in the future” “Recommend us to a colleague”

2011: 18 50 47
2012: 45 68 50
2013: 51 71 65

“Meet, exceed expectations Engage again in the future Recommend us to a colleague”

2011 2012 2013

Member satisfaction is at extremely high levels

“As members, we can work together to contribute the knowledge needed to navigate today’s turbulent, changing times.”

— ANA Chair Stephen F. Quinn, EVP and CMO, Walmart U.S.
ANA Brand Positioning

Advancing the Interests of Marketers

For years the ANA had struggled with its brand positioning — “Insights, collaboration, and advocacy” — because it’s a phrase that, in one form or another, a variety of trade associations lay claim to. This blurring of words not only causes confusion across the association landscape, but, in many cases, leaves organizations indistinguishable from one another.

To differentiate ourselves in the eyes and minds of our members, the industry, and other trade organizations, in 2012 the ANA embarked on a journey to create a new brand positioning. We began by interviewing staff, members, former members, and nonmembers, and then, with the assistance and guidance of our agency partner TAXI-NYC, developed a brand positioning that clearly defines the ANA and sets the course for the future.

The positioning is drawn from our mission statement:

Lead the industry and advance marketers’ success by:

- Championing marketing excellence and collaborative mastery
- Shaping the future of marketing

The ANA has long demonstrated industry leadership through the championing of legislative, regulatory, and industry initiatives on behalf of marketers. These include advertising taxes, commercial free speech, online privacy, and self-regulation, as well as major initiatives like Making Measurement Make Sense (3MS), Ad-ID, and SAG-AFTRA contract negotiating, to name a few.

At the same time, we have had a laser-like focus on fostering and advancing marketing leadership and excellence through the development and curation of thought-leading content, industry-leading conferences and training programs, survey research and white papers, and a growing committee structure.

Our new positioning gives us a singular, cohesive voice centered on advancing the interests of marketers through what the ANA does best: provide industry and marketing leadership.

We believe our new positioning articulates and amplifies our purpose and the value the ANA brings to our members and the industry.

It is our goal that you, as a member, foster marketing excellence within your organization by experiencing how we live our positioning and make it come alive through the delivery of products and services.

“Leadership that advances marketing excellence and shapes the future of the industry.”

We bring together the leaders of the marketing ecosystem to advance the interests of marketers.”
Looking ahead to the year 2020, many global marketing leaders are asking themselves how to ready their marketing organization to drive growth in a rapidly changing environment. In today’s evolving digital world, what marketing does has changed beyond recognition, but how the function is organized has not changed much.

Marketing2020 — Organizing for Growth was initiated to better understand how marketing can best align strategy, structure, and capability to support business growth. The platform offers CEOs, CMOs, and their teams strategic frameworks, practical guidelines, and tools to increase marketing effectiveness.

This global, landmark study was an important stake in the ground for the industry. Marketing2020 leverages the insights of more than 250 CMOs and 10,000 marketers from 92 countries. The ANA is collaborating with EffectiveBrands, SpencerStuart, Forbes, Adobe, and MetrixLab to help U.S. marketers interpret, discuss, and apply key insights and recommendations.

Marketing2020 addresses the key questions that will drive the future of marketing:
- What is the role brands and marketers should play?
- How should the marketing organization be structured?
- How do you build capabilities and equip marketers for success?
- What are the winning CMO leadership skills, competencies, and behaviors?

“The results of the study provide senior marketers around the world with clear pathways to business growth. This is the most ambitious and significant research and leadership initiative to help guide the future of the marketing function.”

— Bob Liodice, President and CEO, ANA
Going Global with The Internationalist 1000

Our global alliance with The Internationalist 1000 and its founder, Deborah Malone, kicked off in mid-2013 with events in New York, Chicago, and the 2013 Masters of Marketing Conference, among others. These events cultivated cross-regional connections, recognized new marketing leaders, and inspired others to take risks as they re-energized their marketing vision.

The Internationalist 1000 are dedicated industry leaders who are reshaping our understanding of marketing’s expanding role throughout the world. In many ways, these individuals are the champions behind the brands. Their efforts ensure that multinational marketing programs move ahead and make a difference. They all share a passion for the business, a devotion to excellence, and a belief in furthering marketing best practices throughout the world.

The main benefits of our global alliance with The Internationalist 1000 include:

- The ability to shape the future of the industry through global marketing leadership
- The opportunity to meet colleagues from around the world in similar roles with similar challenges
- Participation in elite events, dinners, think tanks, awards shows, and online conversations around the world
- Access to The Internationalist digital magazine, dedicated to the business needs of the international marketing professional
- Participation in task forces (virtual or in-person) on key industry issues
- Access to thought-leading insights from the world’s top marketers

Tea and Content

Afternoon Tea with The Internationalist, a newly added content session at the 2013 ANA Masters of Marketing Annual Conference, brought together 125 attendees to hear innovative solutions to everyday branding challenges from ANA members including Diageo, FedEx Corp., and Dell.

Looking Forward to 2014

Over the course of 2014, there will be a minimum of eight co-presented domestic events. These include three seminars at existing ANA conferences in the U.S., plus a series of think tanks and dinners in Asia, Europe, and Latin America.
Multicultural Marketing Excellence Awards

For the 13th year, we acknowledged marketers who produced innovative and outstanding multicultural advertising campaigns. A total of 189 entries were received — a 13 percent increase over 2012. The grand-prize winners of the Multicultural Excellence Awards included:

- **Asian Category**
  - Marine Corps Recruiting Command (United States Marine Corps)
  - Uniworld Group (agency)

- **Hispanic Category**
  - Procter & Gamble
  - Conill Advertising (agency)

- **African-American Category**
  - Walmart
  - History Teaching History
  - Liquid Soul (agency)

- **General Market Category**
  - Wells Fargo
  - Convenience Campaign
  - Acento Advertising Muse, UM/MRM, DDB (agency)

- **Digital Media Category**
  - General Mills, Inc.
  - LuckyToBe
  - McCann New York (agency)

- **Radio Category**
  - Heineken USA
  - Tecate
  - INSPIRE! (agency)

- **LGBT Category**
  - General Mills, Inc.
  - LuckyToBe
  - McCann New York (agency)

- **Print Category**
  - City Year, Inc.
  - Make Better Happen
  - Allen & Gerritsen (agency)

- **Significant Results Category**
  - MillerCoors
  - Stand Up. It's Miller Time
  - commonground (agency)

Marketing Analytics Leadership Award

In 2013, ANA member USAA won the first-ever Marketing Analytics Leadership Award, created to highlight today’s important and rapid adoption of sophisticated analytics in the planning and measuring of global marketing investments. Conceived by the ANA in partnership with leading marketing analytics firm MarketShare, the award carried with it a $50,000 prize.

Between 2008 and 2012, USAA surged from selling 9 percent of its products from marketing investments to 29 percent. The company spends a fraction of revenue on advertising compared to its industry competition. USAA donated its $50,000 prize to the Fisher House Foundation, which provides free or low-cost lodging to veterans and military families receiving treatment at military medical centers.

Rising Marketing Stars Award

For the fourth year, we recognized the latest class of “Rising Marketing Stars”, who demonstrated exceptional skills, creativity, and leadership in their roles and contributed to the overall effectiveness of their organizations.

The four winners were:

- **Alexandra Bozenhard**, brand manager, Excedrin, at Novartis Consumer Health
- **Emma Fryer**, senior marketing communications manager at TOMY International
- **Coley Holback**, marketing manager of global sponsorship marketing at Visa, Inc.
- **Jay Sethi**, brand manager, North America COVERGIRL, at Procter & Gamble
The ANA’s Washington, D.C. office is a critical insurance policy for the advertising and marketing industry.

We work to oppose any efforts by the government to tax, ban, or otherwise burden the legitimate rights of marketers to communicate with consumers. We help to educate important policymakers about the benefits of our industry to the economy as a whole and to individual consumers. We are the advertising community’s voice before Congress, the state legislatures, and the regulatory agencies in Washington, and in the courts. The D.C. office also manages a Legal Affairs Committee and organizes an annual Advertising Law & Public Policy Conference.

Some of our major efforts in 2013 included:

• Providing the primary funding for updated research on the economic impact of advertising by IHS Global Insight, a noted economics analysis organization. The study found that advertising accounts for $5.6 trillion of economic output and supports 21.1 million jobs in the United States annually.

• Meeting with a broad cross-section of key members of Congress on both sides of the aisle to discuss the importance of maintaining the current tax deductibility of all advertising expenditures under the federal tax code.

• Helping to defeat serious ad tax proposals in Minnesota, Ohio, and Louisiana.

• Expanding and strengthening the Digital Advertising Alliance, the industry self-regulatory program for online behavioral advertising, including the introduction of new principles for mobile marketing.

• Working to protect the interests of brand holders regarding the attempt by the Internet Corporation for Assigned Names and Numbers (ICANN) to vastly expand the number of generic top-level domain names on the Internet.

• Successfully pushing for Congress to approve legislation that requires a cost/benefit analysis before four powerful federal agencies can impose unprecedented restrictions on the marketing of food and beverage products directed at children.

• Working for federal legislation to address the serious threats of demand letters and frivolous litigation against both marketers and advertising agencies through the actions of “patent trolls.”

• Hosting another successful Advertising Law & Public Policy Conference, featuring Senator Mark Pryor (D-Ark.), FTC Commissioner Julie Brill, Maryland Attorney General Doug Gansler, and Fadi Chehade, the president and CEO of ICANN.

We want to work closely with the legal and government relations professionals from your company. Please urge them to contact us to discuss how we can best work together to protect your company’s bottom line and First Amendment rights.

We can be contacted at 2020 K Street, NW, Suite 660, Washington, DC 20006; by phone at 202.296.1883; or by email at djaffe@ana.net.

Dan Jaffe | Group EVP
Advocacy and Leadership

“We help to educate important policymakers about the benefits of our industry to the economy as a whole and to individual consumers.”

— Dan Jaffe
Meet Our D.C. Team

The ANA's office in Washington, D.C. has a staff of five. Our staff members are all well-versed in the legislative, regulatory, and legal issues facing advertisers, and have extensive experience working for members of Congress, congressional committees, and state legislatures. We meet regularly with members of Congress and their staffs as well as key regulatory agencies, including the Federal Trade Commission and the Federal Communications Commission. We file amicus (friend-of-the-court) briefs in legal cases affecting key advertising concerns, and participate, where appropriate, in state, local, and international advertising issues. Our team also regularly updates our members on our activities and the issues facing them, and we often seek help from them in these efforts. In addition to our direct advocacy efforts, we manage a Legal Affairs Committee and organize the annual Advertising Law & Public Policy Conference.

Dan Jaffe: Group Executive Vice President, Government Relations (djaffe@ana.net)

Keith Scarborough: Senior Vice President, Government Relations (kscarborough@ana.net)

David Buzby: Director, Government Relations (dbuzby@ana.net)

Meghan Salome: Manager, Government Relations (msalome@ana.net)

Andrew Howell: Legislative Analyst (ahowell@ana.net)

The D.C. staff stands ready to assist any members with questions or concerns about the issues affecting them. Our main office number is 202.296.1883. And be sure to follow us on Twitter at @ANAGovRel.

For more information on our advocacy efforts, visit www.ana.net/advocacy.

Top Issues in Government Relations

Ad Taxes

AT ISSUE:
Advertising expenditures are fully deductible each year as a business expense under the federal tax code. The deductibility of these costs may be in serious jeopardy as Congress considers tax reform. Several state legislatures have also proposed imposing a sales tax on advertising services.

WHAT WE ARE DOING:
The ANA is a founding member of The Advertising Coalition (TAC), which has held more than 20 “grassroots” meetings with key members of Congress over the past several years to educate them about the importance of advertising to the economy. We provided the majority of the funding for an update of the IHS Global Insight report, which demonstrates the economic importance of advertising in every state and congressional district. On the state front, we helped defeat serious ad tax proposals in 2013 in Ohio, Minnesota, and Louisiana.

Online Privacy

AT ISSUE:
Policymakers at both the federal and state levels of government are proposing legislation that would impose serious burdens on the ability of marketers to collect and use information in the online environment, including proposals such as a “do-not-track” regime.

WHAT WE ARE DOING:
The ANA was a founding member of the Digital Advertising Alliance (DAA), the industry self-regulatory program for online behavioral advertising, and that program continues to grow. Since the program’s launch in 2010, more than 23 million consumers have visited the DAA sites to learn about their advertising data choices, and over one million consumers have taken action via the DAA opt-out page to exercise their choice about how marketers will use their data. In July, the DAA released new self-regulatory principles for the mobile environment. The ANA joined two new state privacy coalitions to respond to the increased threat of restrictive proposals in several state legislatures. Working with our members and other industry groups, we were able to defeat, or positively modify, the most onerous bills at the state level.
Top Issues in Government Relations

ICANN

AT ISSUE:
The Internet Corporation for Assigned Names and Numbers (ICANN) recently began rolling out new generic top-level domain names (gTLDs) on the Internet. The vast expansion of more than one thousand new domain names raises serious issues for both brand holders and consumers.

WHAT WE ARE DOING:
For more than two years, the ANA has taken a primary leadership role in casting a spotlight on the serious unresolved problems with the roll-out of new domain names. As a result of our efforts, there were two congressional hearings on the domain-name expansion, and we helped both the Federal Trade Commission and the Department of Justice better understand the risks posed to consumers and companies. We continue to meet with U.S. policymakers to strengthen protections made by ICANN before the expansion of gTLDs.

Food Marketing

AT ISSUE:
In 2011, an interagency working group of four powerful federal agencies proposed unprecedented restrictions on the marketing of food and beverage products directed to children under age 18. Several members of Congress have proposed taxes or restrictions on food marketing.

WHAT WE ARE DOING:
In 2012, we successfully pushed for Congress to approve legislation that blocks the four federal agencies from issuing any report on food marketing unless they carry out a full cost/benefit analysis of their proposal. We have been able to get that restriction included in several funding bills and it remains in place today. In September, we participated in a White House meeting hosted by First Lady Michelle Obama, where we highlighted the efforts of the industry’s self-regulatory program, the Children’s Food and Beverage Advertising Initiative, to address childhood obesity concerns.

Patent Trolling

AT ISSUE:
Marketers and advertising agencies are increasingly being hit with abusive patent litigation and demand letters alleging that they are violating the rights of patent holders through the use of common business practices or technology (e.g., use of Wi-Fi in a restaurant).

WHAT WE ARE DOING:
The ANA is a member of the Stop Patent Abuse Now Coalition, which is working on various legislative solutions and has urged the FTC to become more active in fighting the unfair and deceptive practices of patent trolls. There is bipartisan support in Congress to address this issue. We are hopeful that legislation will be approved during the current session.

The Washington, D.C. office had 61 meetings on Capitol Hill with members of Congress in 2013
Industry Initiatives

Overview

Across a broad spectrum of arenas, ANA articulates the agenda and leads the industry in advancing legislation, thought leadership, industry management, and social/industry responsibility.

Over the past year, the ANA has taken on a number of new leadership programs while continuing to invest resources in critical existing efforts intended to make the industry stronger, more knowledgeable, and nimble. We are committed to making the marketing process more efficient and effective, enabling marketers to maximize the return on their investments. Among the industry programs and efforts we lead or support are Making Measurement Make Sense, Ad-ID, the Alliance for Family Entertainment, the Joint Policy Committee, Stop Patent Abuse Now, ad tax legislation, piracy, brand valuation, privacy, self-regulation, ICANN, and Online Behavioral Advertising.

Making Measurement Make Sense (3MS)

Sponsored by the ANA, the 4A’s, and the IAB, Making Measurement Make Sense (3MS) is a three-year-old cross-industry initiative designed to establish standards for metrics and advertising “currency” that enhance the evaluation of digital media and facilitate cross-platform media comparisons for brand marketing. The goal of 3MS is to enhance marketing and media management decision-making.

3MS changes the way digital media is bought and sold. Launched to help brand marketers and agencies keep pace with the consumer shift in digital media, 3MS addresses marketers’ concerns about having no reliable data and no single currency.

For years, marketers have been plagued with inefficiencies in the planning/buying and post-buying stages of the supply chain, and they were unable to answer the question, “If I shift more of my budget to online, am I better off?” More recently, we have learned that the answer to that question may have been “maybe not.”

At the core of the 3MS initiative is the creation of a viewable standard for digital display advertising. The industry has wanted it for years, and for good reason. It has been reported that as much as 30 percent of digital display advertising buys were wasted due to the inability to see or accurately measure served impressions. With approximately $35 billion spent on digital display ads in 2013, the potential wasted spend amounts to more than $10 billion. What is disturbingly obvious is that while there are more metrics for online media than in any other medium, none are effective for marketers, agencies, or media companies.

A major milestone of the 3MS initiative is about to change all of that. Media Rating Council (MRC), a non-profit industry association which has the goal of confirming that measurement services are valid, reliable, and effective, will by the end of Q1 2014 endorse the widespread use of viewable impressions as a digital currency metric.

The road to a viewable impression standard has been a long one, with significant input and discussion across the ecosystem. The new viewable impression standard changes the way digital ad impressions are measured and makes the buying of these impressions more effective and efficient for all marketers.
Ad-ID

Ad-ID is a web-based system that generates and manages a unique identifying code for each advertising asset and applies that code to all media. Valid Ad-ID codes can only be issued from the Ad-ID system, and include all basic information regarding the advertising asset. To assist the industry with the transition to Ad-ID, extensive educational material was created and distributed.

In October 2012, Ad-ID was unanimously endorsed by the boards of directors of the 4A’s and the ANA as the industry standard for commercial advertising coding. Ad-ID has been widely endorsed as a cross-media standard by more than a dozen associations, as well as by all national networks and local TV stations throughout the U.S.

The Ad-ID system was developed by the ANA and the 4A’s in 2003. Ad-ID serves more than 900 clients, including the largest advertisers and advertising agencies in the world. Ad-ID was named Media Supplier of the Year by Media Magazine in 2012.

SAG-AFTRA Requires Ad-ID for All Union Commercial Production

Last August, commercials negotiations between the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA) and the ANA-4A’s Joint Policy Committee, representing the advertising industry, mandated universal adoption of Ad-ID, the industry coding standard for identifying advertising assets across all media platforms. Ad-ID provides the necessary identification required by all parties for fair talent compensation.

Under the new agreement, all commercials produced for television, radio, and digital platforms featuring SAG-AFTRA union members must now use Ad-ID as the sole standard commercial identifier. The mandate is a critical step forward for Ad-ID and the advertising industry as a whole. Full adoption of Ad-ID will enable greater transparency and accountability and eliminate costly errors associated with the inconsistent use of advertising asset identifiers.
Alliance for Family Entertainment (AFE)

2013 was a transformational year for the ANA Alliance for Family Entertainment (AFE). The “Search for America’s Newest Scriptwriter” contest with judge Will Smith and the first industry upfront partnership for family entertainment with YouTube both delivered on the AFE’s mission of finding, nurturing, and supporting quality content the entire family can enjoy on multiple distribution platforms.

In December 2013, Stephen F. Quinn, executive vice president and chief marketing officer at Walmart U.S., was named chair of the AFE. The news was well received by family marketers and resulted in more than 60 million media impressions. Under Quinn’s leadership, the AFE is off to a strong start in 2014 with bolstered activities and increased membership.

The AFE will focus on three key initiatives in 2014: research, content development, and knowledge sharing. The operating plan will create breakthrough consumer/customer understanding; distribute knowledge of consumer habits, practices, and trends; highlight which TV programs have the highest odds of securing family viewership/support; and drive more family programming options across broadcast, cable, and digital media via advertising, sponsorships, and ownership rights.

The AFE will serve to better position the family entertainment industry to meet the needs of family-driven brands. Members will realize tangible benefits for their companies, leading to improved media ROI and operational excellence.

Joint Policy Committee on Broadcast Talent Union Relations (JPC)

On April 1, 2013, the Joint Policy Committee on Broadcast Talent Union Relations (JPC), the employer bargaining unit established decades ago by the ANA and the 4A’s to deal with the unions representing actors and musicians who perform in television and radio commercials, successfully concluded negotiations on a new three-year collective bargaining agreement with SAG-AFTRA. The collective bargaining agreement represents nearly $1 billion in annual spending by advertisers on actors who perform in commercials. It is the largest union agreement in the entertainment industry, exceeding the compensation paid to actors in movies or on television. Under the ANA’s leadership, the JPC kept wage increases below 3 percent per year and eliminated many provisions that were costly to advertisers when they edited commercials or produced spots for digital media. Perhaps most importantly, the JPC advanced the ongoing negotiations to adopt a payment structure for performers based on gross rating points rather than on the current system of payment silos for each type of media (network, cable, syndication, wild spot, etc.). The old model has prevented the industry from measuring its return on money invested on performers in commercials since the 1950s. The JPC hopes to adopt the new system in 2016, revolutionizing how performers are paid and ROI is measured. Despite the JPC’s hard-driving negotiations, it continues to have an excellent working relationship with SAG-AFTRA leadership that ensures labor peace year-round.
Advertising is a vast driver of sales and jobs and an essential component of the U.S. economy. Each form of advertising — including print, television, radio, mobile, and the Internet — helps businesses build brand awareness and communicate the benefits of their products and services to consumers. Advertising stimulates new economic activity that triggers a cascade of sales and fosters job creation across every industry, state, and congressional district.

**Impact on Sales and Employment**

**IN 2013**
Advertising accounted for $5.6 trillion of the $33.8 trillion in U.S. output and supported 21.1 million of the 136.2 million U.S. jobs.

**BY 2017**
Advertising will account for $6.5 trillion of the $42.3 trillion in U.S. output and support 22.1 million of the 146.7 million U.S. jobs.

<table>
<thead>
<tr>
<th>$22</th>
<th>Sales generated for every dollar of ad spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>$8.78</td>
<td>Direct sales for each dollar of ad spending</td>
</tr>
<tr>
<td>$3.61</td>
<td>Supplier sales for each dollar of ad spending</td>
</tr>
</tbody>
</table>

| 81 | American jobs supported for every million dollars of annual ad spending |

**Potential Impact of Change in Tax Policy**

Advertising is currently treated as a fully tax-deductible expense necessary to the cost of doing business. Just making advertising only 80 percent deductible would trigger:

- A loss of $19.4 billion in ad spending
- A loss of $419 billion in additional economic output
- A loss of approximately 42,000 jobs directly related to advertising
- The elimination of an additional 1.6 million in indirect U.S. jobs

*Source: IHS Global Insight study, commissioned by the ANA and The Advertising Coalition (forecast period 2012–2017)*
Message from the Board Chair

It was another year of exceptional growth for the ANA, from the number of new members to the attendance at events to the organization’s overall influence. Most importantly, the ANA delivered on its new positioning: “Leadership that advances marketing excellence and shapes the future of the industry.” This success was the result of ANA staff meeting the tremendous demands of marketers for its services.

In her book The Gifts of Imperfection, Brené Brown writes, “One of our greatest barriers to connection is the cultural importance we place on ‘going it alone.’ Somehow we’ve come to equate success with not needing anyone. Many of us are willing to extend a helping hand, but we’re very reluctant to reach out for help when we need it ourselves. It’s as if we’ve divided the world into ‘those who help’ and ‘those who need help.’ The truth is that we’re both.”

That’s the great thing about the ANA: as members, we can work together to contribute the knowledge needed to navigate today’s turbulent, changing times. There’s give and take that benefits customers, consumers, our organizations, and our careers.

At the 2013 Masters of Marketing Conference, we heard remarkable stories about the stunning breadth of change our industry is undergoing. At the same time, we received practical advice from the best in the business on what to do about it.

Amid the disruption brought about by technology, it was inspiring to hear Visa CMO Antonio Lucio talk about the importance of purpose as a north star in building brands and reaching consumers. John Costello of Dunkin’ Brands reminded us that a great idea differentiates a company and answers the question, “Why should I choose you?” And Salesforce.com’s Mark Benioff showed just how much customer-centricity is changing in a world dominated by social, mobile, and local media. As Instagram and Pinterest have proved, social media is evolving rapidly, suggesting that there may never be stability in the platforms and channels we’re learning to master.

Perhaps the most dramatically changing dynamic is the customer. As Unilever CMO Keith Weed said, “Get to the future first, and welcome customers when they get there.” I believe the only way we can do that is together — and that’s what the ANA enables us to do.

Here’s to an exciting 2014!

Stephen F. Quinn, Board Chair l EVP and CMO at Walmart U.S.
More than ever, it is critical that the ANA help to ensure marketers have the necessary skills and experience to lead the industry’s transformation.
2013 Overview

The ANA has a large and diverse portfolio of national industry and members-only conferences. Our conferences are unique in the marketing industry, as we showcase the client-side perspective.

Our national industry conferences, open to all, are true “events,” consisting of great content, superb networking with an A-list of attendees, and evening entertainment, all in fabulous locations.

Our members-only conferences, open to current members and invited guests, are a complimentary benefit of membership. In 2013 we held 25 events, in locations throughout the U.S. Hosts included 3M, Anheuser-Busch InBev, Walt Disney Parks and Resorts, Ford Motor Co., The Home Depot, MillerCoors, and Wells Fargo.

Our complimentary Webinar Wednesdays provide members with the opportunity to enjoy rich content from the comfort of their offices. We held 54 webinars throughout the year. These hour-long events covered hot topics such as digital, social, agency management, content marketing, and big data, with perspective and insight from senior-level members and industry experts.

ANA sponsorships and partner programs provide the opportunity for interested companies to have exposure to, and engage with, ANA members and other industry leaders.

• The Strategic Partner program, our most exclusive sponsorship level, provides our partners with year-round access, involvement, and networking via various ANA member touch points.

• The Thought Leadership program is a secondary sponsorship level, and its cornerstone is a sole-sponsored custom magazine delivered both digitally and in print, in addition to other ANA member touch points.

• À la carte sponsorship opportunities are also offered across all ANA national industry conferences, providing opportunities for access to ANA members through exhibit spaces, coffee breaks, dinners, breakfasts, receptions, and more.

Bill Duggan  |  Group EVP

“I have been attending this conference for several years. I always find relevant topics and learn something new. It is a unique conference where I have a great opportunity to meet peers, network, and benchmark.”

— Attendee, ANA Advertising Financial Management Conference
A Year of Record Performance

Our eight national industry conferences in 2013 — including seven premier multiday events — collectively attracted more than 5,000 members and nonmembers. Even more impressive, four events posted record attendance.

- **February 24–26 | Miami, Fla.**
  ANA Media Leadership Conference presented by YouTube
  324 registrants; exceeded goal

- **March 19–20 | Washington, D.C.**
  ANA Advertising Law & Public Policy Conference
  251 registrants

- **April 17–19 | Palm Beach, Fla.**
  ANA Brand Masters Conference presented by The New York Times
  285 registrants; sold out

- **May 5–8 | Scottsdale, Ariz.**
  ANA Advertising Financial Management Conference presented by Active International
  613 registrants; sold out; record attendance

- **July 14–16 | Dana Point, Calif.**
  ANA Digital & Social Media Conference presented by Meredith
  384 registrants; sold out; record attendance

- **October 3–6 | Phoenix, Ariz.**
  ANA Masters of Marketing Annual Conference
  2,200 registrants; sold out; record attendance

- **November 3–5 | Los Angeles, Calif.**
  ANA Multicultural Marketing & Diversity Conference presented by Clear Channel Media + Entertainment
  798 registrants; record attendance

- **December 4 | New York, N.Y.**
  ANA Real-Time Marketing Conference presented by Starcom
  352 registrants; exceeded goal

Did You Know?

- The 2013 ANA Multicultural Marketing & Diversity Conference was the biggest in its 15-year history, with a record 798 registrants.
- Four events included live-stream coverage.
- Two conferences transitioned from single-day to multiday events: ANA Media Leadership Conference (formerly the ANA TV & Everything Video Forum), and ANA Brand Masters Conference (formerly the ANA Brand Conference).

“ANA content is consistently excellent, and the networking is better than at other conferences.”

— Attendee, ANA Brand Masters Conference
Masters of Marketing Conference

Better Than Ever

Living up to its billing as the industry’s signature event, our Masters of Marketing Annual Conference in Phoenix, Ariz., attracted a record crowd of 2,200. In addition, nearly 100 members and nonmembers took advantage of our live-stream coverage.

Attendees heard remarkable stories and rich insights from the best senior marketers in the business, from companies such as Walmart Stores, Inc., The Coca-Cola Co., Subway Franchisee Advertising Fund Trust, Dunkin’ Brands, Inc., and GE, as well as from other industry thought leaders across the entire marketing ecosystem.

“The best conference I have been to,” one attendee wrote in the post-event survey. “I believe the conference produced excellent content and points of view.”

The evening entertainment was also masterful in every way, with performances from Jewel, Jason Mraz, and Tony Award-winning actress Laura Benanti.

“It is great to be able to hear directly from CMOs and other top executives from our industry. And the entertainment was phenomenal!”
— Attendee, ANA Masters of Marketing Conference

“As my colleague said, ‘It’s like Disneyland for marketers.’ The location, hotel property, and staff were over the top, and the content each day was filled with great messaging for smarter marketing methods.”
— Attendee, ANA Masters of Marketing Conference
Members-Only Conferences and Webinars

Spreading Our Wings
We held 25 members-only conferences in 2013 in cities across the U.S., including Boston, New York, Atlanta, Detroit, Orlando, Louisville, Chicago, Minneapolis, St. Louis, and San Francisco. These complimentary events collectively attracted more than 2,800 members, a new record.

The conferences with the highest attendance included:
- **Innovation Day** at Walmart Stores, Inc. in Bentonville, Ark.
- **Social and Mobile** at Electronic Arts in Redwood, Calif.
- **Digital, Social, and Mobile** at Walt Disney World in Lake Buena Vista, Fla.
- **ANA/Effies: Effective Marketing and Media Insights** at Time Warner in N.Y.C.

21
Number of members-only conferences held at member company locations, including 3M, Anheuser-Busch InBev, Walt Disney Parks and Resorts, Ford Motor Co., The Home Depot, MillerCoors, and Wells Fargo.

82.1
The record Net Promoter Score for a members-only conference, established at our ANA/Effies: Effective Marketing and Media Insights event at Time Warner.

“This was an excellent conference. There were a wide variety of topics and speakers and great learnings. Overall, the best conference I’ve ever attended.”
— Attendee, Digital, Social, and Mobile Members-Only Conference at Walt Disney World

“The staff was amazing, and the speakers and content were phenomenal. I walked away with a lot, and I am excited to brainstorm some new strategies.”
— Attendee, Marketing to Millennials Members-Only Conference at the House of Blues
In the Spotlight

In 2013, we produced 12 issues of ANA Magazine Spotlight, our 12-page sponsored digital magazine. A print version was also mailed to senior-level ANA marketers. Spotlight is available at www.ana.net/mkc. The issue themes included:

- Brand strategy and identity design
  Lippincott
- Tablet publishing
  Condé Nast
- Direct mail marketing
  USPS
- Digital marketing
  [x+1]
- The expanding impact of TV
  TVB
- Agency management
  Decideware
- Data management
  SAS
- Mobile strategy
  Yahoo!
- Mobile video
  Millennial Media
- Programmatic marketing
  Chango
- Digital place-based advertising
  DPAA
- Customer experience
  RAPP

Did You Know?

The ANA Masters of Marketing Annual Conference attracted 37 exhibitors and 36 conference sponsors — a record for the event.

Sound of Music

Thanks to great sponsorship support, attendees at many of our multiday national industry conferences in 2013 were treated to live performances by well-known artists. They included:

- **Jewel**
  Provided by LiveNation
  Four-time Grammy Award nominee who has sold more than 27 million albums worldwide

- **Jason Mraz**
  Provided by Clear Channel Media + Entertainment
  Grammy Award winner whose song “I’m Yours” has surpassed $21 million in sales worldwide

- **Laura Benanti**
  Provided by Meredith
  Tony Award winner for Best Featured Actress in a Musical

- **Meghan Hilty**
  Provided by VEVO
  Starred in the hit TV musical drama Smash

- **RaVaughn**
  Provided by Columbia Creative Agency
  Up-and-coming singer/songwriter from California

- **Frankie J.**
  Provided by Pandora
  Former member of the musical group Kumbia King
The mission of ANA committees is to advance the marketing knowledge of members and provide a forum for peer-to-peer exchange and networking. Increasingly, our committees play thought leadership roles in addressing key industry issues. We have 20 committees covering topical areas such as agency relations, integrated marketing, media, multicultural marketing, and social media. Committees meet in New York, Illinois, and California, and a teleconference option is offered to members who are unable to travel to meetings.

Our committees are steered by chairs who are senior leaders from ANA member companies and experts in their respective fields. We view our committees and committee chairs as extensions of our board of directors.

Committees are key originators and advocates of industry leadership initiatives. Recent examples include:

- **Advertising Financial Management Committee:** Released the white paper “Elevating the Role of Marketing Procurement,” which focuses on procurement success metrics. Founded the ANA Procurement Task Force, a group dedicated to elevating the role of marketing procurement.

- **Agency Relations Committee:** Released the white paper “The Rise of the In-House Agency” to shed light on the penetration of in-house agencies, the services that these agencies handle, the degree to which external agencies are displaced by in-house agencies, the advantages and disadvantages of in-house agencies, and the internal costs to companies of employing in-house agencies.

- **Media Leadership Committee:** Convened the Commercial Ratings Summit to discuss solutions that could help to facilitate the availability of brand-specific commercial ratings for television. Released the white paper “Brand-Specific Commercial Ratings: Benefits and Solution Providers” to highlight solutions from eight companies and continue the industry dialogue on this issue.

- **Multicultural Marketing and Diversity Committee:** Established Multicultural Marketing Thought Leadership Forums to help increase the impact of marketing to an increasingly multicultural nation. Created the ANA Multicultural Excellence Awards to elevate exposure of outstanding work and celebrate the year’s best multicultural advertising campaigns.

- **Production Management Committee:** Released the white paper “The Found Money of State Commercial Production Incentives” to raise awareness of financial incentives that many states offer to advertisers which shoot commercials in their states, and to establish that such incentives belong exclusively to the advertiser.

ANA committee members consist of approximately 3,000 individuals from more than 400 companies.

Bill Duggan  |  Group EVP

“Participating in ANA committees provides the opportunity to discuss relevant topics with industry colleagues to get a broader perspective and gain insight on emerging trends.”

— Sal Vitale, category leader, media procurement, at Johnson & Johnson
Committees

Committee Chairs

Advertising Financial Management
Michael Thyen, director of marketing and sales procurement at Eli Lilly and Co.

Agency Relations
Eve Reiter, vice president of marketing category management and agency relations at American Express Co.

Brand Management
Roger Adams, senior vice president and chief marketing officer at USAA

Business-to-Business
Bill Stabile, senior director of brand and marketing communications at Siemens Corp.

Digital Marketing
Tom Cunniff

Legal Affairs
Christopher Sloan, assistant vice president and senior corporate counsel at Liberty Mutual

Media Leadership
Mark Kaline, global director of media, licensing, and consumer services at Kimberly-Clark Corp., and Colleen Milway, media director at JPMorgan Chase

Mobile Marketing
Edward Martin, director of mobile marketing at The Hershey Co.

Multicultural Marketing & Diversity
Gilvert Dávila, president and chief executive officer at Dávila Multicultural Insights

Production Management
John Lick, executive producer of broadcast production at Target Corp., and Valerie Light, advertising production manager at Verizon Communications

Social Media
Michael Donnelly, senior vice president and group head of global digital marketing at MasterCard Worldwide

Sponsorship & Event Marketing
Gerald Johnson, chief diversity officer and executive vice president of marketing at the American Heart Association, and Brian Maynard, director of marketing at Whirlpool Corp.

Regional Committee Chairs

Advertising Financial Management
West Coast Chapter
Ron Jensen, national manager of financial synergies at Toyota Motor Sales U.S.A., Inc.

Agency Relations
West Coast Chapter
Kellie Krug, senior vice president of enterprise marketing services at Wells Fargo Bank, N.A.

Media Leadership
West Coast Chapter
Alison Fowler, managing director of brand strategy and activation for digital channels at Charles Schwab & Co., Inc.

Social Media
West Coast Chapter
Christine Morrison, Turbo Tax social media marketer at Intuit Inc., and Diane Ueberle, brand and social leader of marketing excellence at Intuit Inc.

Integrated Marketing
(Chicago-based)
Julie Koewler, global advertising director at Accenture

Midwest Digital & Social
(Chicago-based)
Stevie Benjamin, director of media at MillerCoors LLC

“The Advertising Financial Management Committee is a wonderful point of connection between the marketing community and the procurement community. Those involved understand the needs and requirements of a robust creative environment. They also understand the business imperative of ensuring all investments (including those related to marketing activities) have a positive return for the organization.”

— Terri Burns, strategic sourcing consultant at Aflac

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— Terri Burns, strategic sourcing consultant at Aflac
As critical issues and emerging trends that nearly all marketers face today, ANA surveys are based on topics identified by the ANA and its membership.

SURVEY RESEARCH

In October 2011, the ANA and 4A’s partnered to document and publicize best practices for both clients and agencies to consider in the agency search and selection process. Those guidelines can be accessed on the respective ANA site.

As a follow-up to those guidelines, the ANA and 4A’s believe there is an opportunity to enhance the briefing process. The ANA/4A’s task force believes that every phase of a review, or agency search, requires a thoughtful briefing that eases the review progress from the initial phases (e.g., RFI, RFP, credentials) to the later phases (including any strategic planning efforts).

Each review phase warrants different types and levels of client briefing information.

Initial List/Request for Information (RFI) Phase

• The purpose of an RFI is to gather basic information about many agencies.
• At this point, you’re not asking the agencies to do any customized work beyond introducing themselves.

• Risk Mitigation: typically either (a) ensuring the financial health of the agency (e.g., bankruptcy, or defaults in the last 10 years) or (b) ensuring the agency has the capability to deliver on current and future business (e.g., resources, track record, etc.)
• Process Improvements: both internally and with suppliers
• Industry Intelligence: awareness of benchmarks and trends
• Cost Reduction: typically, savings year over year (paid media spend, media value of media, etc.)
• Agency/Supplier Performance Improvements
• Alignment of success metrics between procurement and marketing
• The importance, both current and ideal, placed on the delivery of the campaign
• The metrics, both current and ideal, used to measure performance

That’s a Fact

3,200 ANA members, from more than 400 companies, joined a committee in 2013, compared with 2,865 in 2012.

Attracting a Crowd

The best-attended committee meetings in 2013 were:

• Sponsorship & Event Marketing at SeaWorld in Orlando, Fla. 78 attendees
• Shopper Marketing at Walmart in Bentonville, Ark. 51 attendees

“...The ANA Media Leadership Committee has been of particular value to me. It allows me to stay connected with the latest developments on innovations in media and measurement, and it provides a regular opportunity to connect with peers to discuss open issues and obtain input on solutions. Finally, it allows me to stay connected with the client-side media community so that I can have ongoing informal communication with other companies as needed.”

— David Dobbins, director of global media and sourcing at Boehringer Ingelheim Pharmaceuticals, Inc.
2013 Overview

The ANA School of Marketing (SoM) experienced another year of record growth by all key measures: number of workshops, members engaged, satisfaction, and revenue. This was due to our innovative learning solutions, which feature a unique combination of real-world experiences and best practices from top client-side marketers and industry thought leaders.

Demand for marketing skills development from ANA members has grown consistently over the past few years. In response, the School of Marketing has evolved its business system and is poised to be the go-to resource for the training needs of client-side marketers.

Marketers’ roles are transforming at an unprecedented pace. More than ever, it is critical that the ANA help to ensure that the talent pool has the necessary skills and experience to lead this transformation.

To meet increased member demand for training regionally, the SoM successfully expanded its seminars outside of New York City, to Chicago and San Francisco. We will continue to test new markets in order to bring more training opportunities to our members across the country.

In 2014, the ANA will introduce new training formats and content to address the needs of senior marketing executives.

Nick Primola  I  SVP

“I believe career development is one of my key responsibilities for Aflac. How do I help our team work more effectively, stay relevant, and improve their careers? I asked the ANA School of Marketing to work with us to produce a four-day ‘Mini-MBA’ curriculum. The ANA SoM team did a fabulous job with our marketers, and we are ready to get the next program started.”

— Michael Zuna, senior vice president and chief marketing officer at Aflac
Top Accomplishments in 2013

- The ANA School of Marketing provided marketing skill development to 196 member companies, a 31 percent increase in member utilization over 2012. Moreover, 231 workshops were held, a 22 percent increase over 2012.
- Almost 3,900 members experienced an ANA School of Marketing onsite workshop. The workshops garnered an average rating of 4.27 for content and 4.54 for faculty (using a 5-point scale), as well as an average Net Promoter Score of 42.
- Almost 400 members enrolled in one of the 25 individual training workshops. The workshops had an average rating of 4.27 for content and 4.67 for faculty (using a 5-point scale), as well as an average Net Promoter Score of 48.
- The School of Marketing generated $549,000 in revenue, a 52 percent increase over 2012. The money will be reinvested to serve our members’ ongoing training needs.

Instructor Spotlight

Rod McNealy
Area of Focus: From Insights to Great Messaging

One of our most highly rated faculty members, Rod McNealy has been teaching courses at the ANA School of Marketing for more than four years. His engaging, educational workshops help marketing teams understand the true essence of their brands in a customer-focused way.

McNealy’s 38-year business career has centered on the fields of marketing and advertising. He worked at Johnson & Johnson for 31 years, following a stint at Procter & Gamble in brand management. Both organizations are long-time ANA members.

As director of the Johnson & Johnson Marketing & Advertising College until his retirement, McNealy directed global marketing training across all three of the company’s business sectors: pharmaceutical, medical devices/diagnostics, and consumer.
The mission of the Marketing Knowledge Center is to offer members a rich suite of high-quality, relevant, and actionable content that covers the entire marketing spectrum and positions the ANA as the undisputed center of marketing knowledge excellence.

The Marketing Knowledge Center is comprised of:

- More than 8,000 marketing insights available via our website, sourced from ANA committees, conferences, and webinars; ANA’s proprietary survey research program; and prominent third-party industry partners
- A qualified team of resourceful information experts dedicated to responding to ANA members’ unique marketing challenges with customized research that is trusted, timely, and tailored to their needs
- A survey research community of marketers contributing to the ANA’s overall thought leadership on topics identified as critical by the ANA and our members

Our best-in-class portfolio of products and services makes the ANA the trusted source for marketing information and the first place our members turn to for insights that can help them make better marketing decisions faster.

2013 Overview

To meet the growing interests and needs of the membership, marketing content leadership is a critical objective of the Marketing Knowledge Center. We began our “Knowledge Partner Program” three years ago and have curated contributions from more than 100 organizations. In 2013 we strategically strengthened our portfolio with several major content additions, including:

- Marketing toolkits, tools, and templates to help members expand their marketing know-how and complete projects effectively
- Award-winning Effie case studies and videos from industry-leading brands, highlighting the most effective marketing strategies
- Award-winning case studies from the Mobile Marketing Association Smarties, the world’s only global mobile marketing awards program recognizing outstanding achievement within the industry

In 2014 we will continue to substantially enhance the ANA’s intellectual capital base by expanding our content offerings so members have access to the cutting-edge insights and intelligence they need to grow their business.

Kathleen Hunter  |  SVP

Surveys

- There were more than 8,300 downloads in 2013 (a 39 percent increase over 2012), on topics ranging from agency compensation to sponsorship measurement to real-time marketing.
- The April survey on the rise of in-house agencies was downloaded by 1,200 members.
- More than 900 marketers make up the ANA survey community, with more signing up every day.

“I like that the ANA is thinking about what’s on the horizon and taking the pulse of my peers so that we can see the trends.”

— ANA Member, MKC Satisfaction Survey
Content

- More than 2,250 pieces of new content were added in 2013 (a 71 percent increase over 2012), including 18 toolkits, 342 tools, and 743 case studies from the Effies and Mobile Marketing Association’s Smarties Awards.
- Fifteen Insight Briefs covered hot topics, including sports marketing, marketing to Hispanic consumers, local marketing, green marketing, out-of-home, affluent and luxury markets, social media, music in advertising, content marketing, big data, and branded entertainment.
- More than 400 snapshots were created from ANA events.
- Ninety-seven percent of ANA member companies engaged with ANA content.
- Total readership of ANA content grew 50 percent, compared to 2012, with more than 127,000 pieces of content viewed.
- The new marketing tools were downloaded more than 12,000 times by members.
- The two most popular content products in 2013 among ANA members were snapshots and associated speaker presentations, followed by toolkits and tool templates.
- The MKC partnered with 32 new third-party companies, increasing our Knowledge Partners to 113.
- A total of 216 pieces of content were added by Knowledge Partners.

Research

- In 2013, ANA’s team of five researchers answered more than 2,300 questions from members, a 31 percent increase over 2012.
- Members’ usage of the MKC’s LiveChat offering — submitting their marketing questions in real time via the website — grew 30 percent versus 2012.
- The five most-requested topics were:
  - Agency relations
  - Digital, social, and mobile marketing
  - Brand building
  - Research
  - Marketing financial management and procurement
- 73 percent of ANA member companies engaged with the ANA research service.
2013 Overview

The mission of the Marketing and Communications group is to provide our members with the information and insights that drive marketing excellence. We accomplish this by utilizing a broad array of touch points and programs, including email, our website, our newly redesigned and award-winning magazines, social media, direct mail, and PR.

As the demand for timely and relevant marketing information increases, our primary communication vehicle, ana.net, offers our 30,000-plus members access to thought-leading content, tools, and information on a 24/7 basis. Members have access to case studies, best practices, more than 300 marketing tools, and marketing insights, as well as information on events, training opportunities, and legislative and leadership initiatives that affect every marketer.

Our best-in-class email program has expanded. Based on a member’s individual interests, we can deliver customized insights and information on more than 20 topics, up to seven days a week. During the past year the ANA’s Marketing and Communications team has also:

- Provided members via daily emails with more than 600 pieces of proprietary marketing content, including case studies, best practices, and marketing tools
- Launched the ANA’s new brand positioning: Leadership that advances marketing excellence and shapes the future of the industry
- Redesigned and expanded the print and digital versions of our award-winning ANA magazines to provide members with more in-depth articles on relevant topics of the day
- Increased social media outreach by more than 18 percent on Facebook, 15 percent on Twitter, and 42 percent on LinkedIn (ANA Marketers group)
- Received nearly 800 mentions across print, digital, and broadcast media
- Generated more than one million website screen views
- Established a global alliance with The Internationalist 1000
- Conducted 14 Q&As with top CMOs for publication in MediaPost and leading vertical trade publications
- Conducted nearly 50 Onsite Insight video interviews with featured speakers at ANA national industry conferences
- Launched the “ANA Multicultural Marketing Series” with DiversityInc
- Reached our most senior marketers 36 times through the distribution of our print publications

Duke Fanelli  |  EVP

ANA Magazine

Pearl of Marketing Wisdom

ANA Magazine, which reaches more than 10,000 CMOs and senior-level marketing executives, received the Custom Publishing Council’s Silver Pearl Award for Most Improved Publication. The magazine moved from a bimonthly to a quarterly publication in 2013, allowing for a fresh design and more in-depth articles on key marketing issues.
Marketing and Communications

Email

- **600** Number of marketing insights delivered via email to members in 2013
- **14.9%** The average open rate of an ANA Brief email, a 13.7 percent increase over 2012
- **6,475** Number of ANA members who have set their email preferences, including 2,253 in 2013

New Offerings

- **The Internationalist**: This bimonthly digital magazine is dedicated to the needs of the international marketing professional, with global marketing insights, award-winning case studies, and more.
- **FYI**: This periodic email offers the latest marketing news and information from the ANA.

ANA Website

Interested in leading-edge marketing insights? Want to register for the next ANA committee meeting, national industry conference, webinar, or training class? Curious about how our government relations activities support the industry? Looking to review your email preferences or a document saved to “myANA”? All that and more is available with just a click or two of the mouse when members visit the ANA website.

Each day, the ANA website provides thousands of members with critical marketing insights and information designed to guide them through the changing marketing landscape. Through myANA, members can bookmark and share content with colleagues, manage email preferences, review and schedule upcoming events, explore our more than 20 committees, conduct a quick search of the Marketing Knowledge Center, and much more.

The ANA website is a portal to the latest marketing thought leadership, key marketer-led events, and critical information needed to make effective marketing decisions that drive the bottom line.

Blog Posts

We let members know what’s on our minds through a combination of print and video blogs. **Marketing Maestros** is the place for staff and guest bloggers to comment on the latest marketing trends, events, and general happenings in the industry. **Regulatory Rumblings**, penned by Dan Jaffe, group executive vice president of government relations at the ANA, focuses on legal initiatives that threaten national advertisers’ freedom of commercial speech. **Marketing Musings** is the playground of ANA president and CEO Bob Liodice, where he addresses the industry’s most pressing subjects via video.
Marketing and Communications

Social Media

We continue to see a dramatic increase in engagement on our social media outlets thanks to a consistent publishing schedule and a more tightly focused, structured strategy. Our strategy allows us to effectively engage members and nonmembers in the social sphere, raise awareness of the ANA’s products and services, and enhance our leadership position through content. As of mid-December 2013, we had 4,237 Facebook fans, 6,651 Twitter followers (@ANAMarketers), and 2,504 LinkedIn members in the ANA Marketers group. We also have very active (and growing) LinkedIn groups for the ANA Financial Management Conference, the ANA Multicultural Marketing & Diversity Conference, and the ANA Digital, Social Media, and Mobile Marketing Committee.

Facebook

• More than 685 users have liked us on Facebook since Dec. 2012.
• Our highest concentration of Facebook fans (10 percent) resides in New York City. Rounding out the top four are Chicago (4 percent), Los Angeles (3 percent), and San Francisco (2 percent).
• 49 percent of our fans are women, and 39 percent of them are between the ages of 25 and 54.
• 37 percent of our male fans are between the ages of 25 and 54.
• In November, our most engaged demographic was men in the 18–24 age group. This group (8 percent of our fan base) accounted for 18 percent of our total engagement.
• Our single most popular post in 2013 was seen by 1,573 people on Facebook. It was a link to a March blog post on Marketing Maestros.

Twitter

• Our top two performing hashtags are #ana_masters and #anamarketers.
• We have been listed 343 times.
• Our potential reach is 2,685,531.
• Accounts that influence our reach include AHAA (@AHAA), Karl Greenberg (@tychob17), Barbara Basney (@bbasney), WerbeAgentur Online (@agenturwerbung), and DAAUSA (@DAAUSA).
• We had 896 tweets retweeted a total of 1,755 times, and we were mentioned more than 800 times in the fourth quarter alone.
• More than 550 of our followers are classified as “influential.”

LinkedIn

• More than 1,500 members have joined the ANA Marketers group since January 2011.
• 22 percent of members reside in the greater New York area, 12 percent in the San Francisco Bay area, and 8 percent in the Chicago area.
• 26 percent of members are managers, 21 percent are senior managers, 20 percent are directors, and 15 percent are vice presidents.
• 43 percent of members work in marketing and advertising, 9 percent in consumer goods, and 7 percent in financial services.

@ANAGovRel — Making Its Voice Heard

Last September, our government relations team in Washington, D.C. launched the Twitter handle @ANAGovRel as part of a larger public relations effort. It will allow the group to boost its visibility as the leading voice for the ad community in D.C., provide breaking news as it happens, and connect with key individuals shaping policy. The handle has the potential reach of 50,265 Twitter users. The top performing hashtags to date are #patenttroll and #taxreform.

One Sweet Tweet

Our most retweeted (and favorited) tweet was from October 4, 2013:

• “Walmart’s Stephen F. Quinn: Protect your mavericks and innovators, encourage them, and have them work on key assignments. #ANA_Masters”
“Our financial success demonstrates we are on the right path — a path defined by strategic intent, a clear sense of purpose, and a strong leadership platform.”

— Christine Manna
2013 Overview

2013 was an exciting year of record financial performance at the ANA, from operating income to net income to revenue. Our financial success demonstrates we are on the right path — a path defined by strategic intent, a clear sense of purpose, and a strong leadership platform. Our growth strategies, unrelenting drive to deliver member value, and wide array of projects and initiatives that help shape the industry are what enable us to continue to deliver solid financial performance.

In 2013, the ANA posted operating income of $2.9 million, an increase of 37 percent over 2012. It marked the fourth straight year of results exceeding $2 million. Net income grew to $2.9 million, from $2.1 million a year ago, and revenue increased 14 percent, to $24.2 million. The revenue growth supported our business-building operating expenses, which have largely been in human capital. Without great people, value cannot be created. These investments were strategically important to our continued progress and to delivering quality products and services.

The ANA’s balance sheet continues to be strong and vibrant. Total assets were up 16 percent over 2012, financial ratios remain healthy, and with the exception of our pension liability, we continue to be debt-free. Our liquidity profile continues to be in superb shape at $10.2 million, up 25 percent from last year. We ended the year with cash and cash equivalents of $4 million, an increase of 32 percent from a year ago, and investments (reserves) were $6.2 million, up $1.1 million from a year ago.

Lastly, our financial stewardship and significant surplus cash position enabled us to meet all our financial and capital obligations and to move forward in incrementally funding many of the strategic leadership and advocacy areas noted in this annual report. This strategy, now in its fourth year, provides the resources and flexibility to invest in projects, programs, and initiatives important and relevant to ANA members and the marketing ecosystem. With this available funding, we continue to elevate our role, stature, and relevancy with our members and strategically aligned partners, and within the marketing community.

As we closed our year, we are proud to highlight our key accomplishments:

- A solid, growing membership base, increased member engagement levels, and high satisfaction scores
- An outstanding industry leadership profile and recognition
- A robust infrastructure, including an abundance of marketing intellectual capital
- A strong financial performance, cash-flow generation, and substantial liquidity
- Growth in ANA’s human capital
- Record attendance at the Masters of Marketing Conference, the premier industry gathering in the U.S.
- A dedicated team of legislative and regulatory professionals, enhanced by ANA-led coalitions and consortia

The ANA’s forward momentum and progress are a reflection of a simple, understandable business model predicated on a philosophy of expanding membership, relevant products and services, and a comprehensive leadership agenda.

Christine Manna  |  COO and CFO
Operating/Net income rose to almost $3 million

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<th>Year</th>
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Net worth topped $4.5 million

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Financials

Revenue grew to $24.3 million

Investments reached $6.2 million
Our membership is comprised of the top marketers and thought leaders in marketing today. We thank our members for their collaborative mastery and desire to move the industry forward.
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Fiskars Corporation
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FM Global
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Formica Corporation
Franklin Templeton Investments
FTI Consulting
G
Genentech, Inc.
General Electric Company
General Growth Properties, Inc.
General Mills, Inc.
General Motors Company
Georgia-Pacific Corporation
GlaxoSmithKline
Global Experience Specialists
Godiva Chocolatier, Inc.
Gogo
Goldman Sachs & Co.
The Goodyear Tire & Rubber Company
Grant Thornton LLP
Great Southern Wood Preserving, Inc.
Green Mountain Coffee Roasters, Inc.
H
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Habitat for Humanity International, Inc.
Hallmark Cards Inc.
Hanesbrands, Inc.
The Hartford
Hasbro, Inc.
Healthfirst
Heineken USA, Inc.
Henkel Consumer Goods, Inc.
Herschend Family Entertainment
The Hershey Company
Hewlett-Packard Company:
HP Enterprise Services
HHGregg, Inc.
Hillshire Brands Company
Hilton Worldwide
Hitachi America, Ltd.
Hologic Inc.
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Hormel Foods Corporation
Houlihan’s Restaurant, Inc.
The House of Blues Entertainment, Inc.
Humana Inc.
Hunter Douglas, Inc.
Hyatt Corporation
Hyundai Motor America
IBM
IBM Corporation
IHOP Corporation
IKEA North America
Illimina, Inc.
IMAN Cosmetics
InfoComm International
ING Americas
Ingersoll Rand
Intel Corporation
InterContinental Hotels Group
Intermarine, LLC
International Dairy Queen, Inc.
Intuit Inc.
INVISTA
Irish Dairy Board, Inc.
Islands Restaurants
J
The J.M. Smucker Company
Jamba Juice Company
JBS USA LLC
JC Penney
John Hancock Financial Services, Inc.
John Muir Health
Johns Hopkins Medicine
Johnson & Johnson
Johnsonville Sausage LLC
JPMorgan Chase TS Unit
JPMorgan Chase & Co.
Juniper Networks
Just Born, Inc.
K
Kao USA Inc.
Kellogg Company
K ennametal Inc.
Key Corp.
Kia Motors America, Inc.
Killerspin, LLC
King’s Hawaiian Bakery West, Inc.
Kiss Products, Inc.
Knouse Foods Cooperative, Inc.
Knowledge Universe
KPMG LLP
Kraft Foods Group, Inc.
L
L’Oreal USA
La Quinta Inns and Suites
La-Z-Boy Incorporated
Ladies Professional Golf Association
Lam Research
Land O’ Lakes, Inc.
The LanguageWorks, Inc.
Lebanon Seaboard Corporation
Legg Mason & Co., LLC
LEGO Systems, Inc.
Lenovo Group Ltd.
Levi Strauss & Co.
Liberty Mutual Group
LifeLock, Inc.
LifeSouth Community Blood Centers, Inc.
Limited Brands, Inc.
Lincoln Financial Group
Live Nation, Inc.
Local Search Association
Logan’s Roadhouse, Inc.
Logitech
Lord & Taylor
Lorillard Tobacco Company
Los Angeles County Museum of Art
Lowe’s Companies, Inc.
LPL Financial
Lucile Packard Children’s Hospital Stanford
Lufthansa German Airlines
Luxottica Retail
M
The Macerich Company
Major League Soccer
Marriott International, Inc.
Marriott Vacation Club International
Mars Incorporated
Mary Kay Inc.
MassMutual Financial Group
MasterCard Worldwide
Mattel, Inc.
Mazda North American Operations
McCormick & Company, Inc.
McDonald’s Corporation
Mckeon Foods Corp.
MeadWestvaco Corporation
Memorial Sloan-Kettering Cancer Center
Mercedes-Benz USA, LLC
Merck & Co.
Merry Hill Systems
MetLife, Inc.
Meyer Distributing
Meyer US
Microsoft Corporation
MetLife
MillerCoors LLC
MINI
Missouri Lottery
Mizuho USA
Moe’s Southwest Grill
Moen Incorporated
Moët Hennessy USA
Mondelez International, Inc.
Monsanto Company
Morgan Stanley — New York
Motorola Solutions, Inc.
N
NASA Federal Credit Union
NASCAR
National Football League, Inc.
National Grid
The National Theatre for Children Nationwide
NAVY Recruiting Command
NBA
Nestlé Purina PetCare Co.
Nestlé USA
New York Life Insurance Company
New York Organ Donor Network, Inc.
The New York Racing Company
Newell Rubbermaid Inc.
Nike, Inc.
Nintendo of America, Inc.
Nissan North America, Inc.
Nokia Inc.
Northstar Lottery Group, LLC
Northwestern Mutual
Norwegian Cruise Line
Novartis Consumer Health, Inc.
Novo Nordisk Pharmaceuticals, Inc.
NVIDIA Corporation
Oil-Dri Corporation of America
Old Navy
Orange Leaf Frozen Yogurt
Orkin Pest Control
Outback Steakhouse, Inc.
Outenwall Inc.
Outrigger Hotels and Resorts
Pacific Life Insurance Company
Pana Bakeries, LLC
Pantone LLC
Paychex Inc.
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2013 marked the fourth year of the ANA Strategic Partner program and the third year of our Thought Leader program. Revenues from these programs have allowed us to not only keep registration costs affordable for attendees at our national industry conferences, but also offer such complimentary member benefits as members-only conferences and webinars. What’s more, our members benefitted from the intellectual capital of our partners throughout the year.

2013 Strategic Partners and Thought Leaders

2013 marked the fourth year of the ANA Strategic Partner program and the third year of our Thought Leader program. Revenues from these programs have allowed us to not only keep registration costs affordable for attendees at our national industry conferences, but also offer such complimentary member benefits as members-only conferences and webinars. What’s more, our members benefitted from the intellectual capital of our partners throughout the year.
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as of December 31, 2013

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• Championing marketing excellence and collaborative mastery

• Shaping the future of marketing
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