The world will never be the same again
The Environment

- COVID
- Social Strife
- Economic and Supply Chain Dislocation
- Invasion of Ukraine
Planting the seeds for an optimistic future
Total Media Ad Spending
U.S. 2021-2025 (billions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Ad Spending (billions)</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>$304.13</td>
<td>25.4%</td>
</tr>
<tr>
<td>2022</td>
<td>$334.02</td>
<td>9.8%</td>
</tr>
<tr>
<td>2023</td>
<td>$363.55</td>
<td>8.8%</td>
</tr>
<tr>
<td>2024</td>
<td>$386.28</td>
<td>6.3%</td>
</tr>
<tr>
<td>2025</td>
<td>$407.09</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

Source: eMarketer Oct ‘21
Total Media Ad Spending, by Media
U.S. 2022 (billions)

- Digital: $293.89
- TV: $66.80
- Newspaper: $9.13
- Magazine: $9.61
- Radio: $11.18
- OOH: $7.07
- Directories: $0.06

Source: eMarketer Oct ‘21
Digital Ad Spending
U.S. 2021-2025 (billions)

Source: eMarketer Oct ‘21
Fortune 500
Average Annual Growth Rates

2010-2015: 1.9%
2015-2019: 4.1%
2010-2019: 3.1%
The New Reality

A guide to marketing in a post-COVID-19 world
DRIVING GROWTH

FOR YOU, THE INDIVIDUAL
FOR YOUR BRANDS AND BUSINESSES
FOR OUR INDUSTRY
FOR HUMANITY
ANA GROWTH AGENDA
THE ANA GLOBAL CMO GROWTH COUNCIL
A Global Force for Good and Growth
“Simply put... humanity is the name of the game.”

Marcel Marcondes
Global President, Beyond Beer Co.
HUMANITY FOR GROWTH
“Our profession needs to obsess about the humans at the heart of business. If we can figure out how to serve their needs, this will be a much richer profession.”

DEAN ARAGON
Chief Marketing Officer
ANA Media Leadership Growth Council
ANA Media Leadership Growth Council

• Creating an army of Chief Media Officers
• Mirrors the CMO Growth Council
• Set the advertiser media agenda
• Address the most pressing and important industry issues and opportunities
• Unlock initiative, innovation, and learning to drive brand and business growth
ANA GROWTH AGENDA

- Brand Purpose/Brands for Humans
- Brand/Marketing Innovation
- Media and Supply Chain Transparency
- Brand, Creativity, and Media
KEY PRIORITIES

• Brand Building Media Strategy
• Media Supply Chain Transparency and Effectiveness
• Minority-Owned Media Investments
• New Media: Metaverse, AI, AR, Crypto
ANA GROWTH AGENDA

- Measurement and Accountability
- Data, Analytics, and Technology
- Privacy, Advocacy, and Self-Regulation
- Data, Technology, and Measurement
KEY PRIORITIES

• Data Transparency
• Cross-Media Measurement
• Privacy and Addressability
• Platform Self Regulation
ANA GROWTH AGENDA
KEY PRIORITIES

• Media and Supply Chain Talent Development
• Media Agency Management and Inhouse Agency Strategy
• Academia: Preparing for the Next Generation of Media Executives
ANA GROWTH AGENDA
KEY PRIORITIES

• Supply Chain Diversity, Equity, and Inclusion
• Supplier Diversity
• Media Sustainability
• Ad Fraud and Brand Safety
Changing the Media Landscape

• Serious media challenges sub-optimize brand and business growth

• ANA leadership/industry collaboration
  • Global CMO Growth Council
  • Media Leadership Growth Council
Media Transparency
Programmatic Media Transparency Study

• Market riddled with material issues, lack of transparency, fractured accountability, and mind-numbing complexity

• Identify ways for advertisers to eliminate waste

• Billions of $$ in productivity and savings to be gained
Measurement
The Cross-Media Measurement Mission

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

Apple IDFA policies

PARTNERSHIP FOR RESPONSIBLE ADDRESSABLE MEDIA
Brand Safety
#ENGAGE RESPONSIBLY
Ad Fraud
Social Media Self-Regulation
National Programs
Diversity, Equity, and Inclusion
THE DEI CHALLENGES

• Industry Diversity
• The Accurate Portrayal of Women and Cultures in Ads
• Supplier Diversity
• Media Investment Inequality
• Society and Bias
What’s good for business is **diversity**. And what’s good for us is to advocate in the right way.

Unwavering courage and a sustained commitment are required...

And it has to last for years.

**Manoj Raghunandanan**
Global President, Self Care

Johnson & Johnson
PROGRESS!!

White 69%
Ethnically Diverse 31%
Accurate Portrayal of Women and Culture in Ads
Supplier Diversity
The Growth of Supplier Diversity

MAY 2021
Systemic Investment Inequality
Commitment to Diverse Media

Heather Stewart
General Director, Global Media and Marketing Services
The road to equality and inclusion starts with equal representation across the creative and media supply chain.

MARC PRITCHARD
ANA Chairman & Chief Brand Officer
ANA GROWTH AGENDA
DREAM
CRAZY
CRAZY
CRAZY
2022 ANA MEDIA CONFERENCE

BOB LIODICE
CEO