

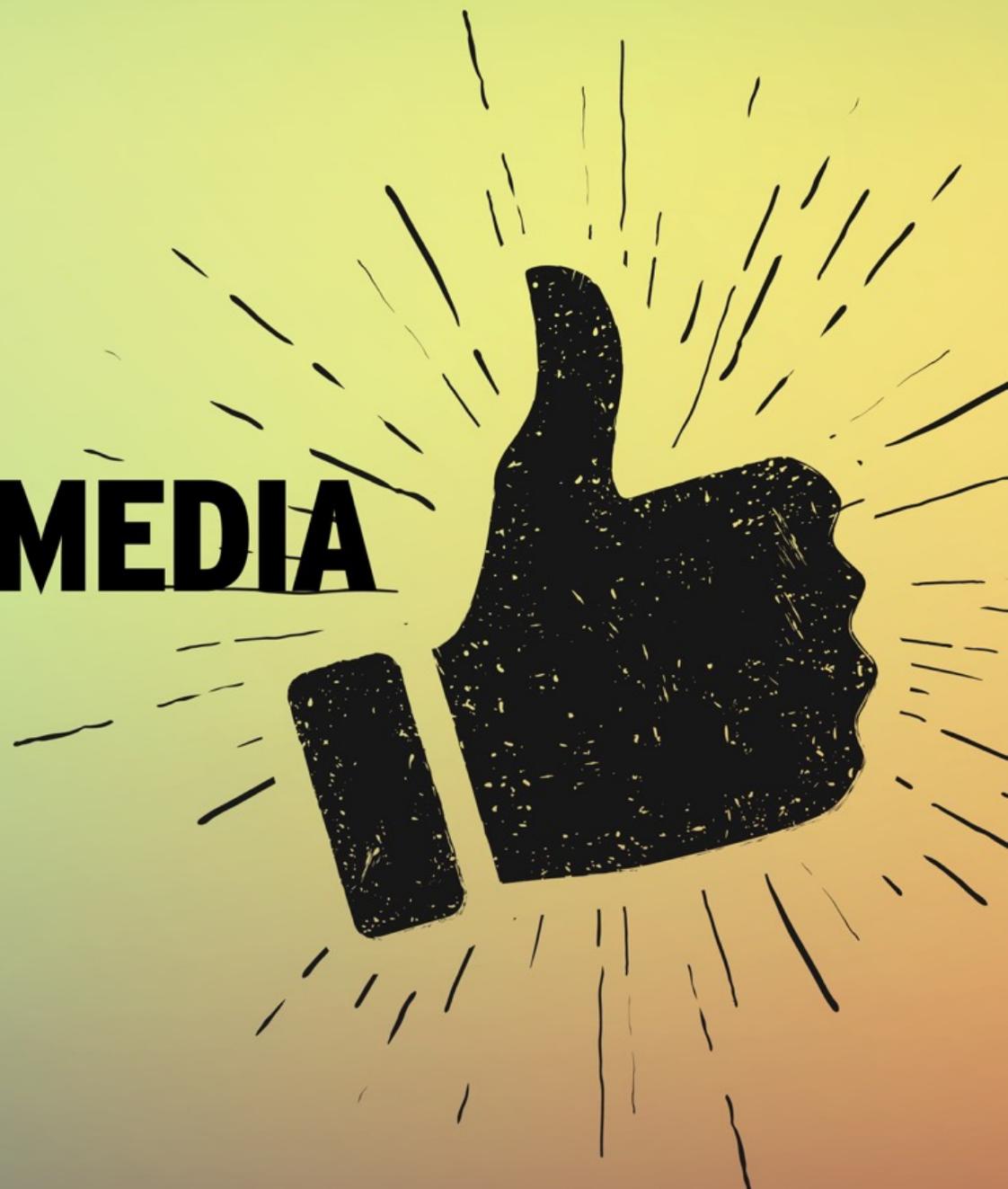


2022 ANA

DIGITAL & SOCIAL MEDIA CONFERENCE

Bob Liodice

CEO



The Environment

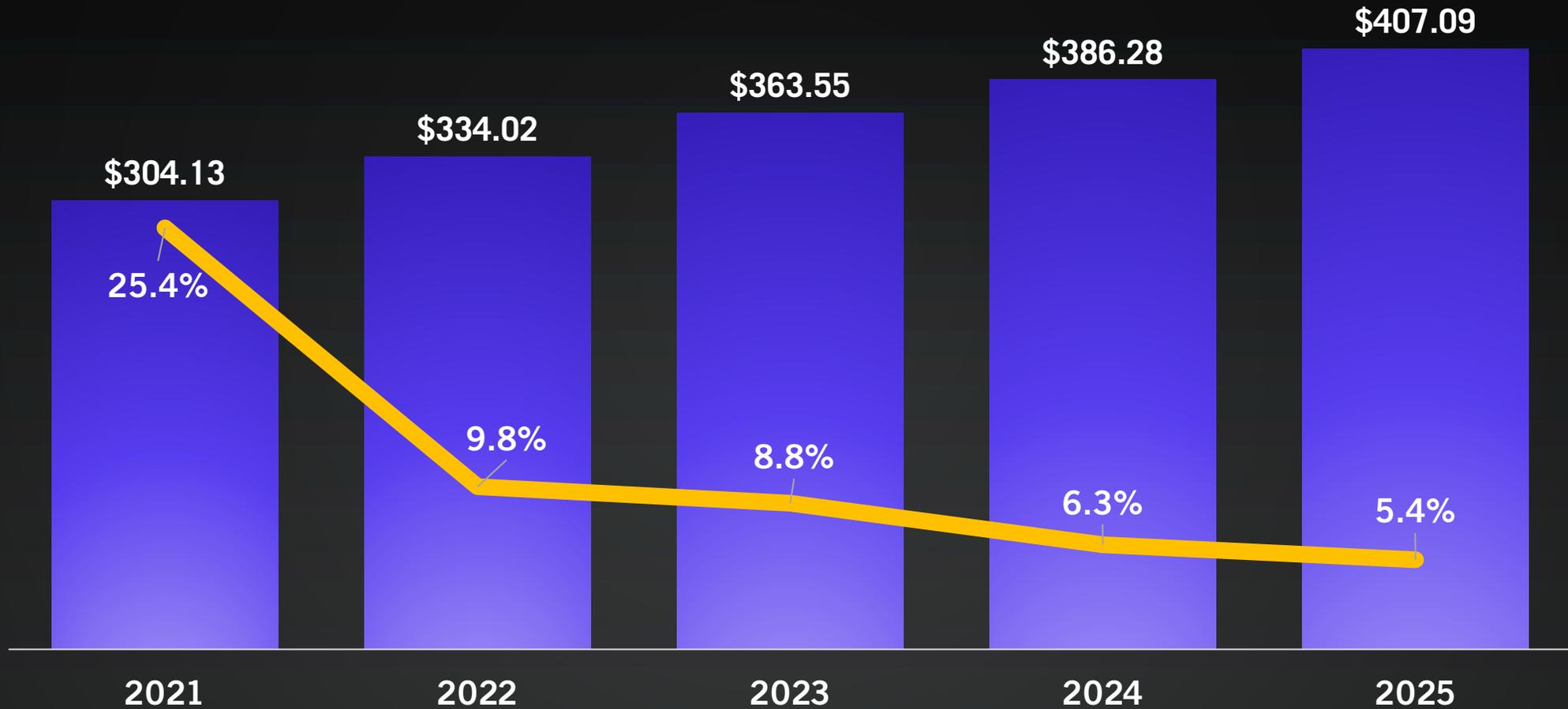
- COVID
- Social Strife
- Economic and Supply Chain Dislocation
- Invasion of Ukraine

**Digital/Technology
plants the seeds
for an
optimistic future**

Media Landscape

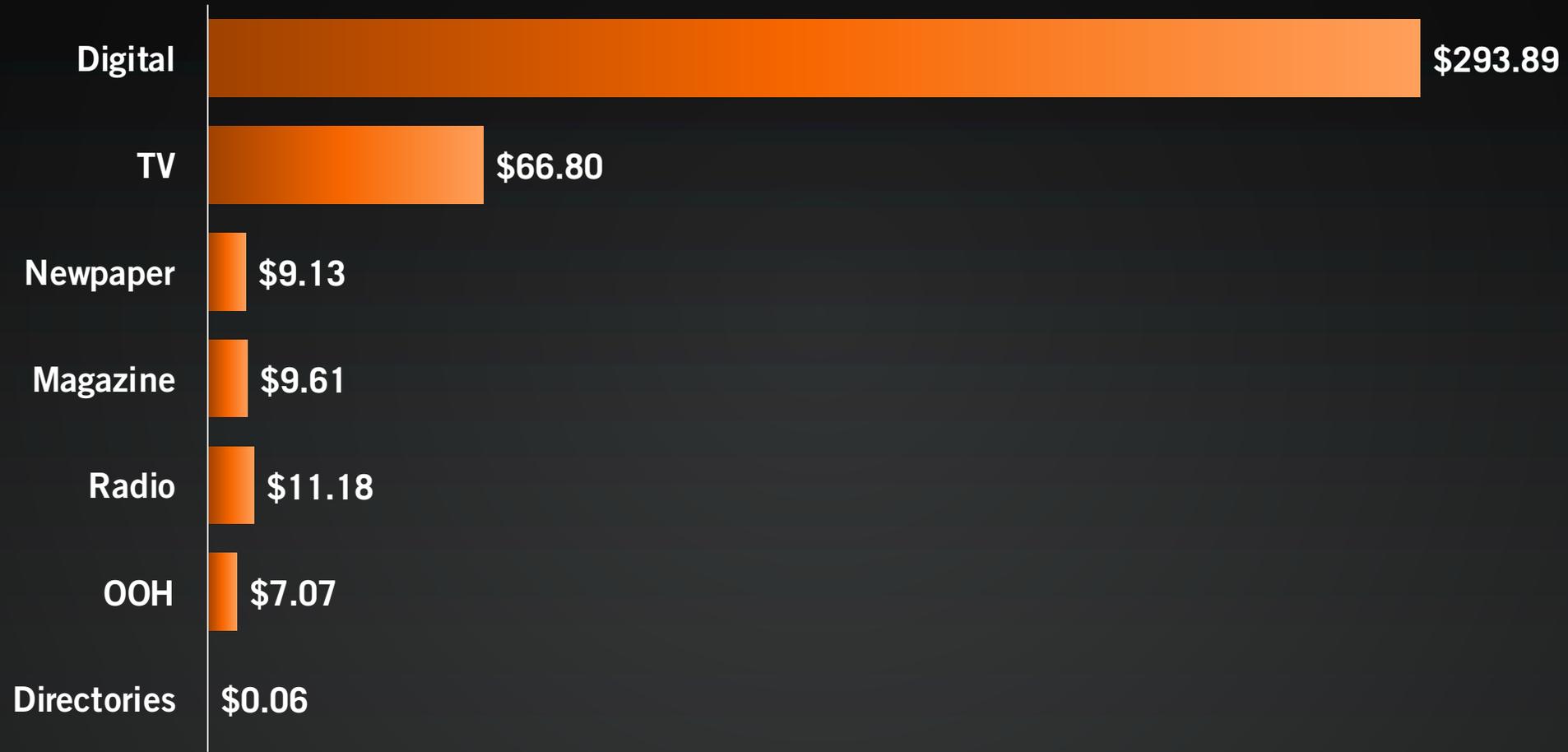
Total Media Ad Spending

U.S. 2021-2025 (billions)



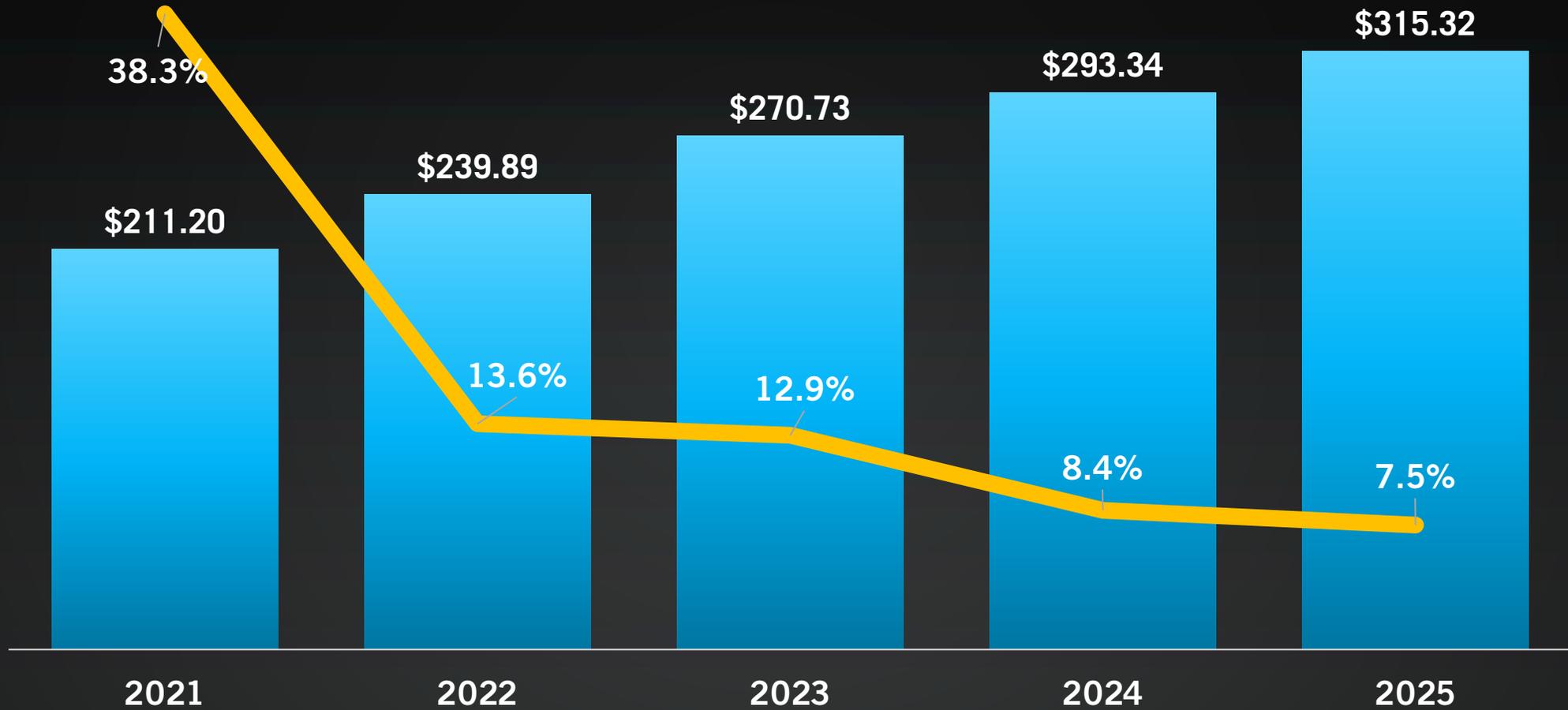
Total Media Ad Spending, by Media

U.S. 2022 (billions)



Digital Ad Spending

U.S. 2021-2025 (billions)





DIGITAL MARKETING TRENDS

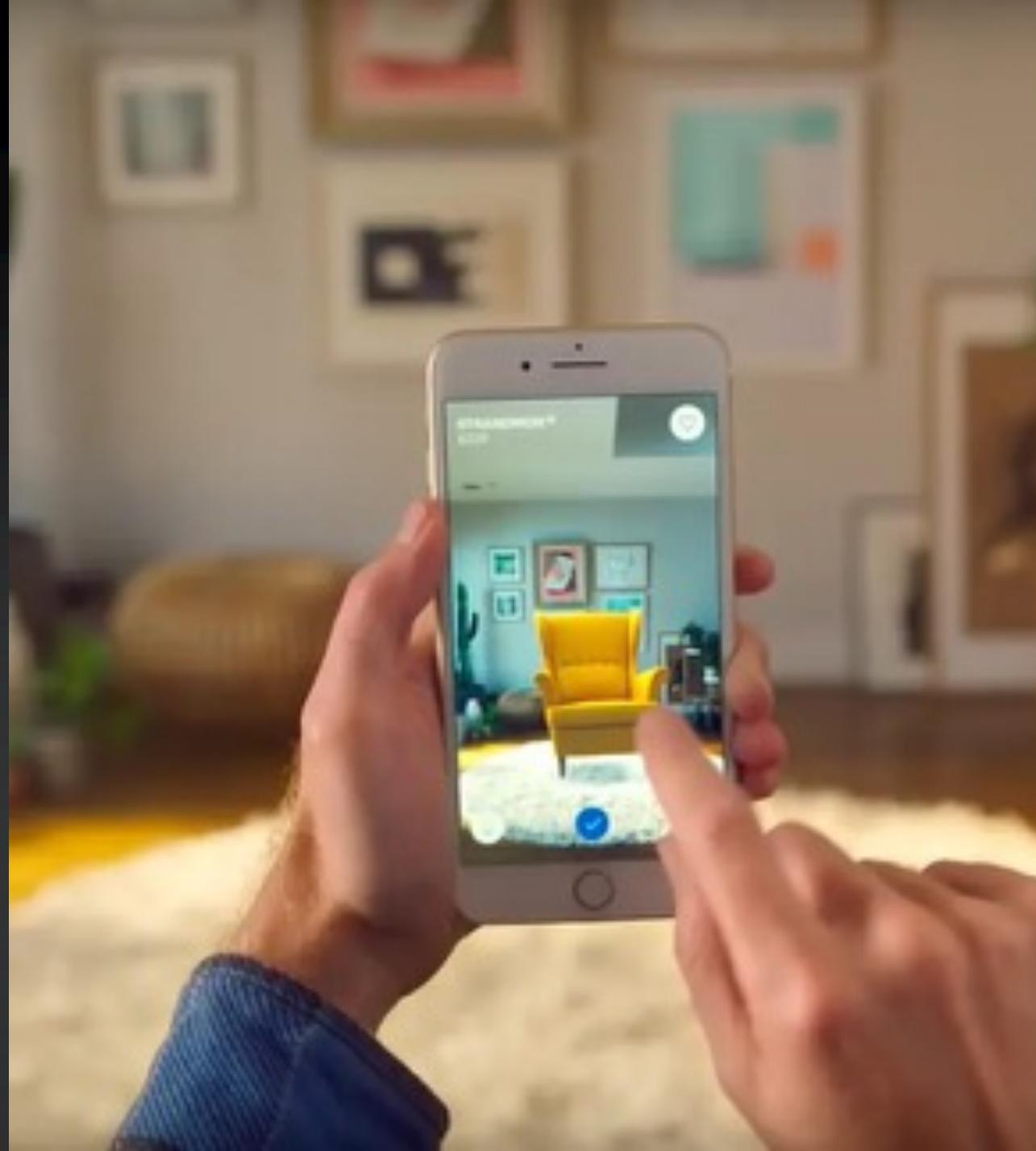
- **Influencer marketing takes center stage**
- **TikTok advances viral commerce**
- **Personalization delivers customized experiences**
- **AI/Metaverse are here to stay**
- **Long-form video content consumes more screen time**

**Global metaverse
projected to reach
\$1.7T by 2025**



Welcome to the Meta Lite Bar, the first-ever brand hosted bar in the metaverse and the only place
MEANT FOR 21+

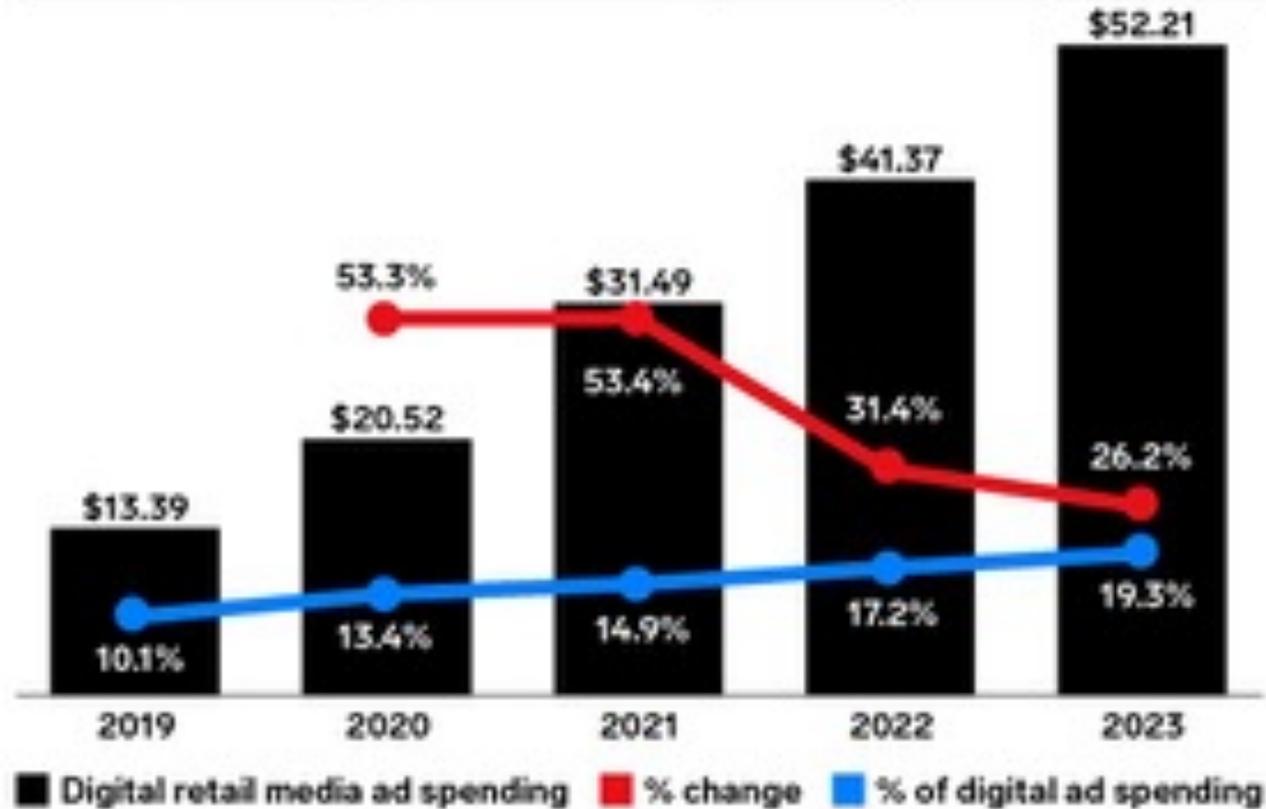
**5G accelerates VR,
AR and XR
and delivers richer,
more immersive
brand experiences**



Retail Media Networks

- \$50B ad category... and growing
- Capturing 1 in 5 digital dollars

US Digital Retail Media Ad Spending, 2019-2023
billions, % change, and % of digital ad spending



Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include advertising on Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps

Source: eMarketer, Oct 2021

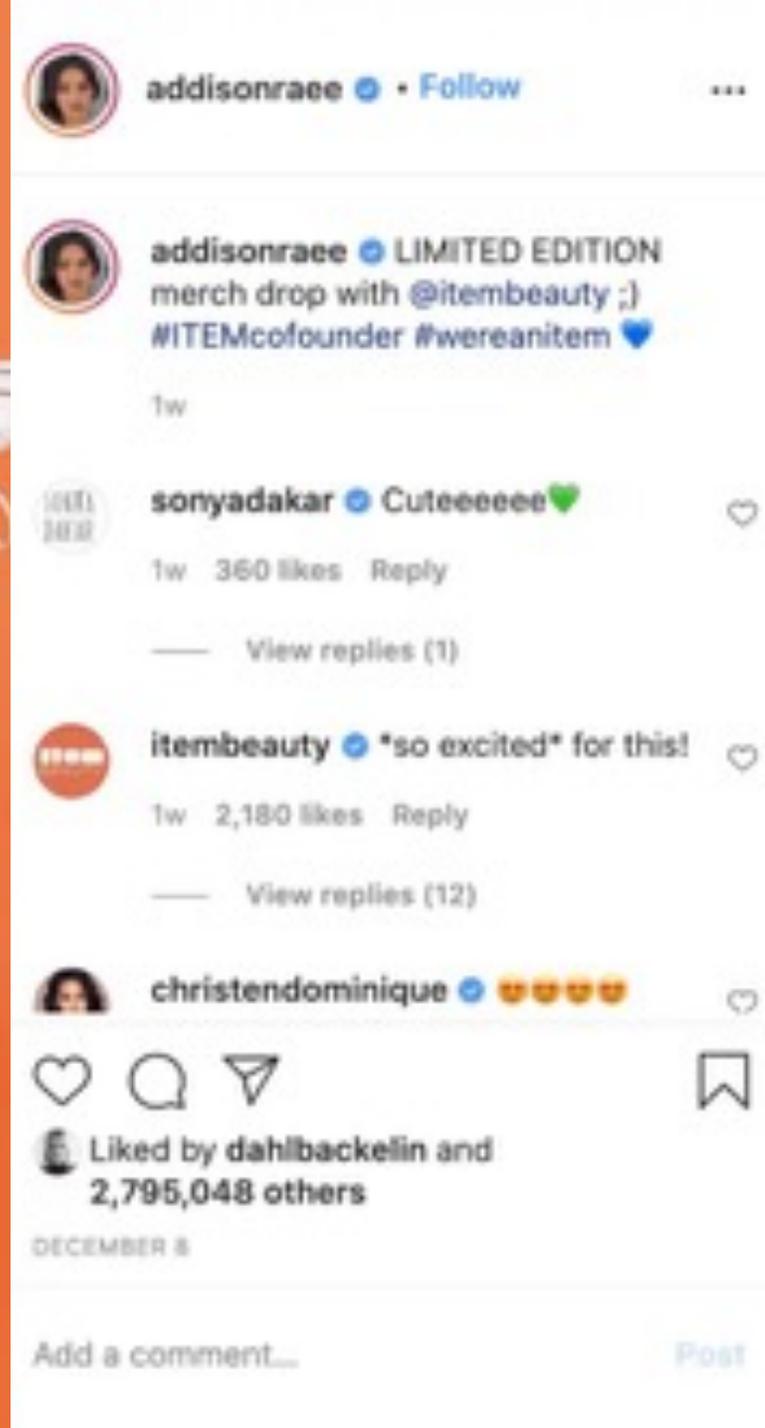
The Power of Social Shopping

In just one day in October 2021, two of China's top live-streamers, Li Jiaqi and Viya, sold \$3 billion worth of goods – 3X Amazon's average daily sales



Influencer Marketing

- \$13.8 billion global industry-\$4B in US
- Projected \$25 billion by 2025



Fortune 500

Average Annual Growth Rates

2010-2015
1.9%

2015-2019
4.1%



ANA MISSION

**DRIVING
GROWTH**

FOR YOU, THE INDIVIDUAL
FOR YOUR BRANDS AND BUSINESSES
FOR OUR INDUSTRY
FOR HUMANITY



THE ANA GLOBAL CMO GROWTH COUNCIL

A Global Force
for Good and Growth



ANA GROWTH AGENDA



**Force for
Good**



**“Simply put...
humanity is
the name of the game.”**

ABInBev

Marcel Marcondes
Global Chief Marketing Officer



**“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



Force for Growth

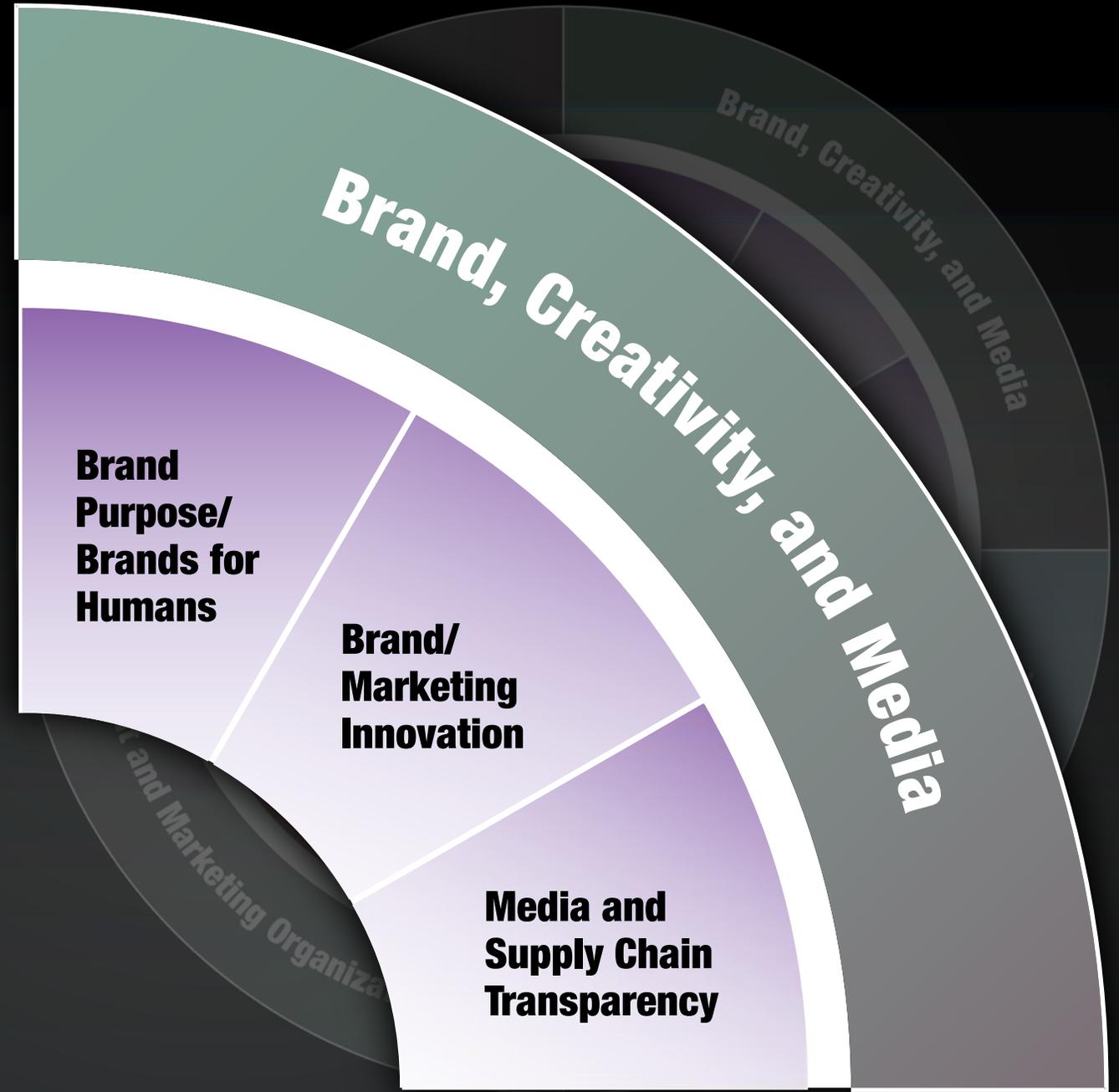
ANA

**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

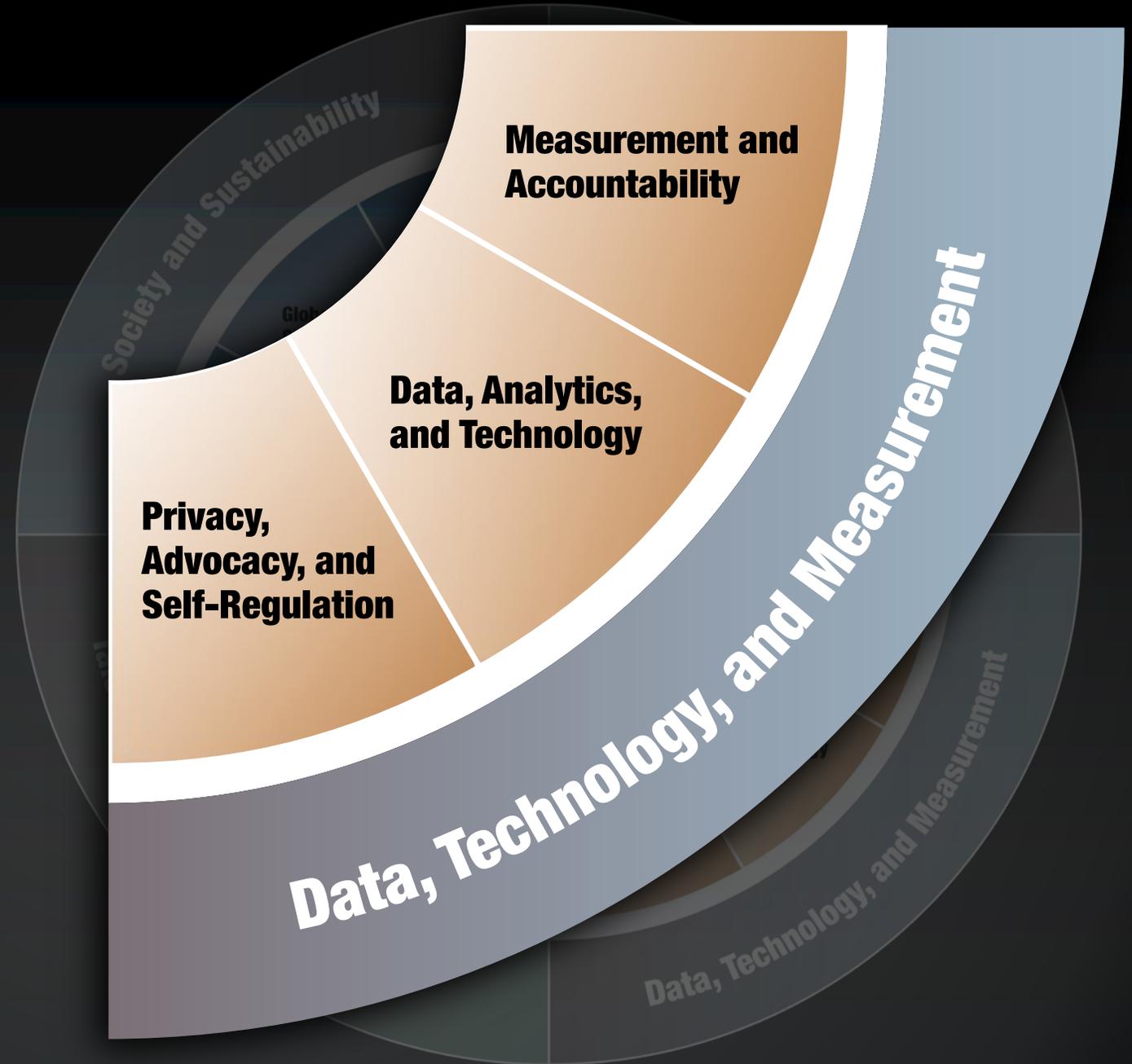




KEY PRIORITIES

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

ANA GROWTH AGENDA





KEY PRIORITIES

- **Data Transparency**
- **Cross-Media Measurement**
- **Privacy and Addressability**
- **Platform Self Regulation**

ANA GROWTH AGENDA

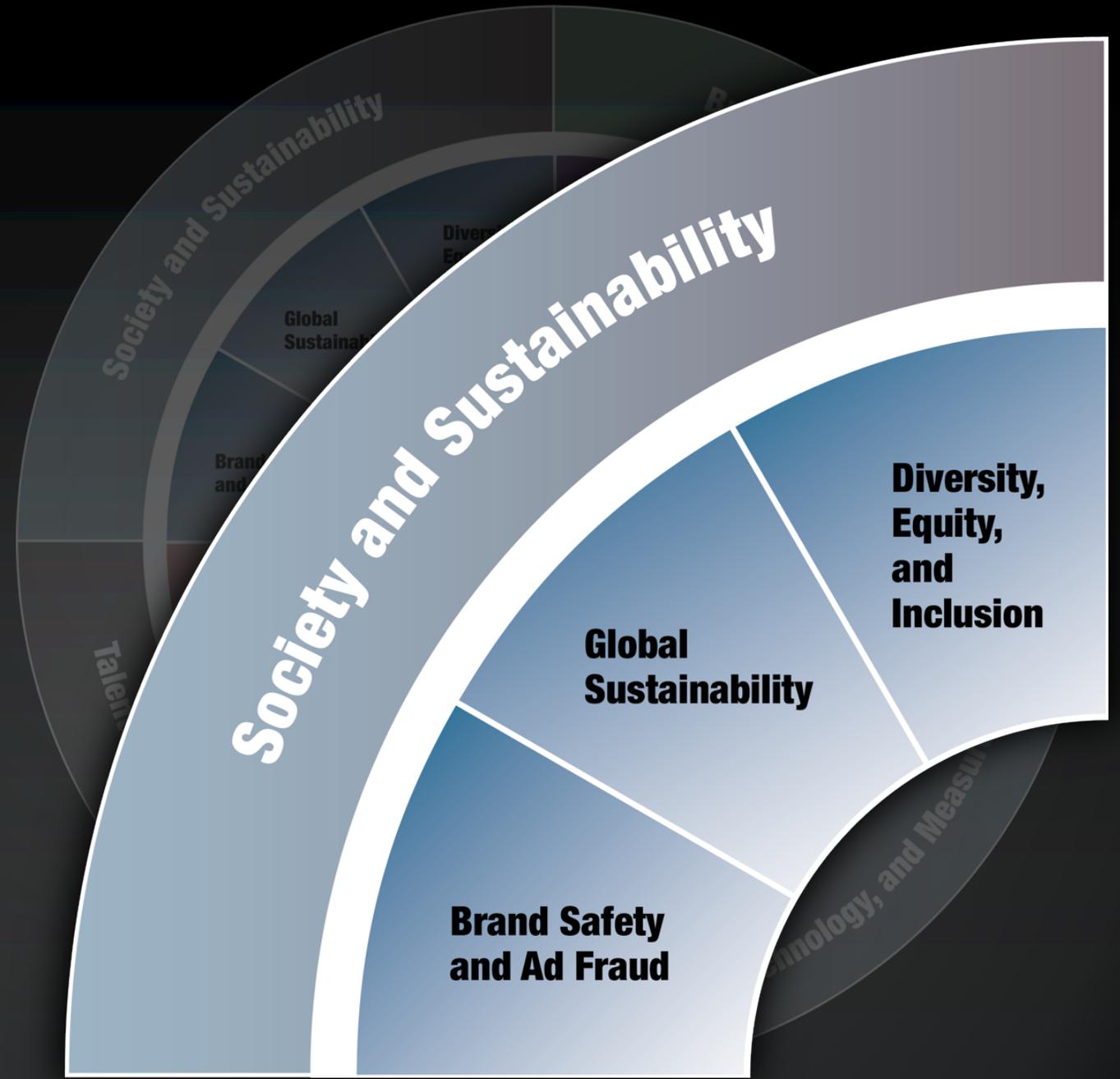


The background features a hand holding a magnifying glass over a circular scale. The scale is labeled with priority levels: 'LOW', 'MEDIUM', and 'HIGH'. The word 'PRIORITY' is also visible on the scale. The overall theme is focused attention and strategic planning.

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
Drives Growth**

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



Programmatic Media Transparency RFP

Eliminating Waste Throughout the
Entire Programmatic Marketplace

APRIL 2021

**Accurate
Measurement
Drives Growth**



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

Data Analytics
Drives Growth

**Responsible
Privacy and
Addressability
Drive Growth**

**3P Cookie
Deprecation**

**Apple
Opt-in**

Portfolio of Solutions

Digital Advertising Alliance

- Alternative Media Identifiers

Marketers

- Non-Identity Solution Testing

**Advancing
Brand Safety
Drives Growth**



GARM Aggregated Measurement Report

Volume 1 | April 2021



#ENGAGE
#RESP[♥]NSIBLY

ANA



National Programs

**Reducing
Ad Fraud
Drives Growth**



TRUSTWORTHY
ACCOUNTABILITY
GROUP

Diversity, Equity, and Inclusion Drive Growth



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



**Accurate Portrayal of
Women and Culture in
Digital and Social Media
Drives Growth**

ANA GROWTH AGENDA





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