This webinar will begin momentarily...
HOUSEKEEPING

This webinar is being recorded and will be available on our site at: aaaaa.org/webinar-series-business-as-unusual

We will be taking questions during the webinar. Please use the Q&A feature on the Zoom screen toolbar.
REBUILDING CLIENT CONVICTION FOR ADVERTISING DURING THE PANDEMIC

MAY 2020
UNCERTAIN TIMES

- Total Number of US COVID Cases

4.4% Unemployment Rate

S2 Trillion Aid Package
US Gov’t

20% Unemployment Rate

Agency layoffs, furloughs, cuts
“Ad Business Cuts 34,000 jobs in April”

Retail bankruptcy Filings

J.CREW
TRUE RELIGION
JCPenney
PAPYRUS
Neiman Marcus

Source: Worldometer, NPR, QZ, Fortune
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CLIENT BEHAVIOR IS BECOMING UNPREDICTABLE

CANCELING
45% of advertisers cancelled campaigns mid-flight

PAUSING
89% of multinationals have paused campaigns (up from 81% in March)

DELAYING PAYMENTS
45-Day → 60-Day → 90-Day → 120-Day

CHANGING DIRECTION
52% to hold back ad spending (compared to 19% in March)

WFA FORECASTS GLOBAL AD BUDGETS WILL BE DOWN 36% IN THE FIRST HALF OF THE YEAR, AND 31% FOR THE FULL YEAR.

Source: WFA's COVID-19 Response Tracker from 38 companies in 17 different categories with a total global ad spend of $46 billion
"The economic decline will be both longer and deeper than expected."

Brian Wieser, Global President, Business Intelligence at GroupM
I'M DONE
CLIENT CONVICTION CRITICAL TO AGENCY SURVIVAL

- COMMITMENT
- TRUST
- STEADY BUDGETS
- COMPETITIVE RATES
- RETAIN TALENT
- BUILD CAPABILITIES
- SUSTAIN GROWTH
"What’s not going to change in the next 10 years?"

Jeff Bezos, Amazon Founder
CLIENT BEHAVIORS YOU CAN COUNT ON

**FASTER**
Rapid-response to shifting consumer behaviors.

**CHEAPER**
Efficient options needed to fit into client budgets.

**ACCOUNTABLE**
Proven RESULTS required for CFO/CEO approvals.
PROVEN MODEL TO BUILD CLIENT CONVICTION

CONSUMER

CURRENCY

CONTROL

CLIENT CONVICTION
CONSUMERS
Identify lockdown-influenced behaviors that are here to stay
IT TAKES ONLY 2 MONTHS TO SOLIDIFY BEHAVIORS INTO HABITS

Mid-March to Mid-May

We are at the threshold

Source: Dr. Maxwell Maltz, Psycho-Cybernetics
WHAT BEHAVIORS ARE HERE TO STAY?

- AT-HOME ENTERTAINMENT
- REMOTE WORK
- HEALTHY LIVING
- ECOMMERCE
ENTERTAINMENT HAS SHIFTED TO AT-HOME MEDIA

TV/CTV/STREAMING/DIGITAL VIDEO

13 BILLION

HOURS STREAMED LAST QUARTER WITH ROKU
(UP 1.6 BILLION HOURS OVER THE PRIOR QUARTER AND 4.3 BILLION HOURS YOY)

2x

NETFLIX DELIVERED DOUBLE THAN EXPECTED NEW SUBSCRIBERS IN Q1, 2020, 16MM

74%

US ADULTS WHO HAVE INCREASED STREAMING VIDEO CONSUMPTION DUE TO COVID

Source: Seeking Alpha, Forbes, eMarketer
ECOMMERCE BECOMES THE PRIMARY SHOPPING CHANNEL

Source: Rakuten Intelligence
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ECOMMERCE REACHES AN INFLECTION POINT

Source: Bank of America, U.S Department of Commerce, Shaw/Spring Research

U.S. Ecommerce Penetration (% of Total Retail Sales)

Source: Bank of America, U.S Department of Commerce, Shaw/Spring Research
### Actions US Adults Have Taken due to the Coronavirus Pandemic, March-April 2020

<table>
<thead>
<tr>
<th>% of respondents</th>
<th>March 10-11</th>
<th>April 9-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Started washing hands more frequently</td>
<td>54%</td>
<td>75%</td>
</tr>
<tr>
<td>Shifted more shopping from physical stores to online</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stopped attending religious services</td>
<td>6%</td>
<td>37%</td>
</tr>
<tr>
<td>Considered delaying a major purchase/spending</td>
<td>10%</td>
<td>35%</td>
</tr>
<tr>
<td>Started an emergency savings or rainy-day fund</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Canceled a business trip</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Made changes to a 401K</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>None</td>
<td>35%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Note:** ages 18+

**Source:** Ipsos/USA Today poll as cited on Ipsos blog, April 13, 2020
EXPERTS ANTICIPATE E-COMMERCE TO DOUBLE IN HALF THE TIME.

ECOMMERCE HABITS ARE IRREVERSIBLE

Pre-Pandemic
Ecommerce 20% of Retail

2025
Ecommerce 40% of Retail

Source: Warc Exclusive, April 2020
Dollars being spent on healthy, digitally accessible solutions

- **+40%**
  - AT-HOME FITNESS

- **+15%**
  - VIRTUAL DOCTOR VISITS

- **+25%**
  - MEDICINE / MEDICAL SUPPLIES

Source: EMarketer
Both employees and businesses prefer WFH

Alignment between individual and industry effectiveness

Individuals question if entire industry can effectively work from home.

Remote work is not viable for entire industry.

Source: LinkedIn Workforce Confidence Index research.
Note: 5,447 professionals in the U.S. were surveyed April 27-May 3.
Looking forward, are people going to want to crowd into offices?” Diane M. Ramirez, chief executive of Halstead

Twitter Will Allow Employees To Work At Home Forever

Google and Facebook extend work-from-home policies to 2021

Source: Buzzfeed News, Silicon Republic, NY Times
CURRENCY
Seek real-time data & insights; Historical audience data is not relevant to Quarantined or Post-COVID economy
THREE MONTHS AGO

WHY CAN’T WE RELY ON ANYTHING THAT IS 3 MONTHS OLD?
WHY CAN’T WE RELY ON ANYTHING THAT IS 3 MONTHS OLD?
WHY CAN’T WE RELY ON ANYTHING THAT IS 3 MONTHS OLD?
TODAY

WHY CAN’T WE RELY ON ANYTHING THAT IS 3 MONTHS OLD?
800M+ PROFILES
1PB CONSUMER DATA
BEHAVIORAL DATA FROM 350K+ SITES
300B+ SCORES/DAY
REAL-TIME REFRESHES

LIVE DATA SOURCES

INTEREST
Behavioral

AFFINITY
1st Party Data

LOCATION
Zones / Areas

INTENT
Search

ATTENTION
Context

GEO/SATELLITE
ZIP Codes / Regions

ACUITY LIVE AUDIENCE

*Additional data sets include but not limited to: Demo/Behavioral-3rd Party Segments/Contextual/CRM data, etc.
CASE STUDY

3rd-PARTY VS. LIVE AUDIENCE TARGETING

0.97% AVG. CTR

1.26% AVG. CTR

3rd PARTY DATA
Reaching Hispanic, Spanish Speakers, Military interests

CONTEXTUAL TARGETING
Reaching Hispanics on relevant sites and content

ACUITY LIVE AUDIENCE
Propensity data used to reach a self-qualified audience and increase relevance for US Army

CURRENCY
CASE STUDY

3RD-PARTY VS. LIVE AUDIENCE

100 ATTENTION

3RD PARTY DATA
Reaching W25+, with Active Healthcare in Orlando, Florida DMA

CONTEXTUAL TARGETING
Reaching Women 25+ with healthcare on relevant sites and content

220 ATTENTION

ACUITY LIVE AUDIENCE
Propensity data was used to reach a self-qualified audience and increase relevance for Florida Hospital

*C'Retal Personas Included; New Hospital Seeker, Cancer Patient, Cardiologist Seeker, New Doctor Seeker, Pediatrician Seeker

CURRENCY
CONTROL

Deliver predictable results by guiding the consumer journey.
GUIDE THE CONSUMER THROUGH THE JOURNEY ACROSS SCREENS

Elizabeth Audience
Flight Range: May 1, 2020 at 9AM - May 15, 2020 at 10pm - Budget Allocation: 100%
GAIN NEW INSIGHTS ON THE VALUE OF INCREMENTAL INVESTMENTS

Journey Conversion Funnel

12% Conversion Rate

10,000,000 Total Potential Reach
8,000,000 Awareness
6,400,000 Entitlement
5,120,000 Conversion
4,096,000 Converted

Dorothy, Jake, Elizabeth
ACHIEVE GREATER CONTROL THROUGH DIGITAL & PROGRAMMATIC CHANNELS

1. BUDGET FLEXIBILITY & OPTIMIZATION
   Digital/Programmatic media will give you greater control

2. SHARE OF ATTENTION
   Digital & Streaming media is the place for consumer attention now

3. SCALED REACH & FREQUENCY
   Manage frequency across screens and devices given the growth in digital time-spent

4. ROAS
   Consumer Value along the journey remains essential for efficiency

5. DATA & INSIGHTS
   Leverage the opportunity to build consumer-direct relationships
<table>
<thead>
<tr>
<th></th>
<th>SOFT $</th>
<th>NEUTRAL $$</th>
<th>STRONG $$$</th>
</tr>
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<tbody>
<tr>
<td>LINEAR TV</td>
<td></td>
<td>INFLUENCER</td>
<td>STREAMING AVOD/OTT/CTV</td>
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<td>OOH</td>
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<td>SEARCH</td>
<td>PROG. DIGITAL VIDEO</td>
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<td>SOCIAL</td>
<td>VIDEO GAME STREAMING</td>
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<td>PROG. DIGITAL DISPLAY</td>
<td>E-SPORTS</td>
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<tr>
<td>SPONSORSHIPS</td>
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Source: WFA’s COVID-19 Response Tracker from 38 companies in 17 different categories with a total global ad spend of $46 billion
AGENCY 1: “YOUR ECOMMERCE DEPARTMENT”
PREVAIL VS. KIMBERLY-CLARK AND P&G

KAYLIE
NEW MOM

Kimberly-Clark

P&G
PREVAIL RECOGNIZED THE OPPORTUNITY!

- Availability trumps brand favorability for consumers
- Challenger & DTC brands must act now to encourage trial
- Life-stage brands will not find a better moment
THE PROTECTIVE HYGIENE AUTHORITY

ASK US ANYTHING, TYPE HERE

COMMON QUESTIONS  WATCH THE FILM

INCONTINENCE EDUCATION HUB
IN-THE-MOMENT INCONTINENCE EDUCATION

HOW CAN I IMPROVE MY BLADDER CONTROL?

WILL I LEAK WHEN HAVING SEX?

ASK US ANYTHING AT ASKPREVAIL.COM
ADS MAKING LIFESTYLE CONNECTION

ACUITY LIVE AUDIENCE

INTERESTS
- VICTORIA BECKHAM
- THE HONEST COMPANY
- MODERN FAMILY
- FIT MOM
- SUPERMOM
- FIT LIFE

INTENT
- BLADDER LEAKAGE
- BUSY MOMS
- QUICK FIX WORKOUT
- CVS PHARMACY
- CHILDREN’S PLACE
- NIKE

ATTENTION

AFFINITY

KAYLIE
FITNESS ENTHUSIAST AND MOM

Kelly Clarkson Says ‘The Plant Paradox’ Helped Her Lose 37 Pounds Without Exercise

Cue the skeptical looks.
By Korto Miller

BUY NOW
DTC + MARKETPLACE

PREVAIL.COM

Amazon e-Store

AWARENESS + DATA

SALES

Sales Numbers Reported from Amazon Dashboard
PROSPECTING

OPEN WEB

- martha stewart
- abc
- FORBES
- USA TODAY
- VANITY FAIR
- buzzFeed
- sheknows
- AARP
- The New York Times
- glamour
- allrecipes
- BlogHer
- healthline
- women's health
- Family Circle
- parenting

RE-MESSAGING

Remind

- ASK US ANYTHING AT ASKPREVAIL.COM
- CALL FOR THE BEST BLADDER LEAK PROTECTION
- BUY NOW

Remind

- Prevail
- Prevail Protective Hygiene for Women
- Prevail Protective Hygiene for Men
- Prevail Team
- Prevail Team

Remind

- Prevail
- Prevail Protective Hygiene for Women
- Prevail Protective Hygiene for Men
- Prevail Team
- Prevail Team

Remind

- Prevail
- Prevail Protective Hygiene for Women
- Prevail Protective Hygiene for Men
- Prevail Team
- Prevail Team
### Amazon Dashboard for Prevail

#### Anne Re-messaging Amazon

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Publisher</th>
<th>Channel</th>
<th>Impressions</th>
<th>Click-throughs</th>
<th>DPV</th>
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<th>Total Purchases</th>
<th>Product Sales</th>
<th>Total Product Sales</th>
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<td>139</td>
<td>173</td>
<td>$5,827.36</td>
<td>$7,165.46</td>
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</tbody>
</table>

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PREVAIL RESULTS

10%+
SHARE OF CATEGORY
(on AMAZON)

300K+
MONTHLY TRAFFIC TO
e-STORE

109%+
GROWTH IN YOY
MONTHLY SALES!
AGENCY 2: “REINVENTING HEALTHCARE SERVICES”
REINVENTING MENTAL HEALTHCARE: GENETICS TESTING + TELE-PSYCHIATRY

A LIFETIME OF SMARTER PRESCRIBING GUIDANCE

The most comprehensive genetic guidance for smarter prescribing decisions

Prescription Required

acuity
Dear Mom... Watch the Full Letter

Dear Mom...

Watch the Full Letter
Creating a Seamless Consumer Experience On Landing Page To Match Ad Experience Across The Web
OVER 6 MILLION KIDS ARE DIAGNOSED WITH MENTAL ILLNESS A YEAR.
END-TO-END DIGITAL HEALTHCARE
AGENCY ACTIONS FOR GREATER CLIENT CONVICTION

- USE REAL-TIME DATA REFLECTING IN-THE-MOMENT BEHAVIOR
- FOCUS ON LASTING CONSUMER TRENDS
- TAKE CONTROL OF THE CONSUMER JOURNEY TO DELIVER RESULTS
Upcoming Webinars

Wednesday, May 27, 3:30 – 5 p.m. ET

Preparing for Business in a Changed World

Andrew Graff, CEO, Allen & Gerritsen
Laura Maness, CEO, Havas New York
Marla Kaplowitz, President & CEO, 4A’s
Mollie Rosen, EVP–Member Engagement & Development, 4A’s

Thursday, May 28, 1–2 p.m. ET

Strategies for Financial Stability

Joe Guage, Chief Financial Officer, First American
Jon Gibbs, Assistant Vice President, First American
Scott Handy, Assistant Vice President, Sales, First American