

ASCENTIAL
Unlock the future

PRODUCTS DEEP DIVE

19-20 June 2019

**CANNES
LIONS**

65TH INTERNATIONAL FESTIVAL
WWW.CANNESLIONS.COM

2019

**WELCOME
TO YOUR
CANNES
EXPERIENCE**

**MAP
2019**



/WELCOME

DUNCAN PAINTER
PHIL THOMAS

2019 KEY PRIORITIES



FOCUS ON EXECUTION

Extend our market leadership across our digital information brands

Establish Ascential strategic client programme



FULLY INTEGRATE EDGE

Drive high cross sell growth

Complete the integration of the teams, business systems and products into a single platform for our customers



MARKETING SEGMENT BACK TO GROWTH

Return Cannes Lions and MediaLink back to growth



ONE ASCENTIAL OPERATING MODEL

Finalise our operating model rollout in Marketing, Finance and Product Development

LEVERS FOR GROWTH

Product Design

NEW PRODUCTS
WGSN Beauty

DIGITAL SHELF
WGSN

OPERATING LEVERAGE


CUSTOMER SEGMENTATION


Marketing

WARC
THE WORK


CLX
Connect. Learn. Experience.
MEDIALINK x 


PUBLICIS GROUPE

MANAGED SERVICES
MEDIALINK[^]

Sales

NEW PLATFORMS

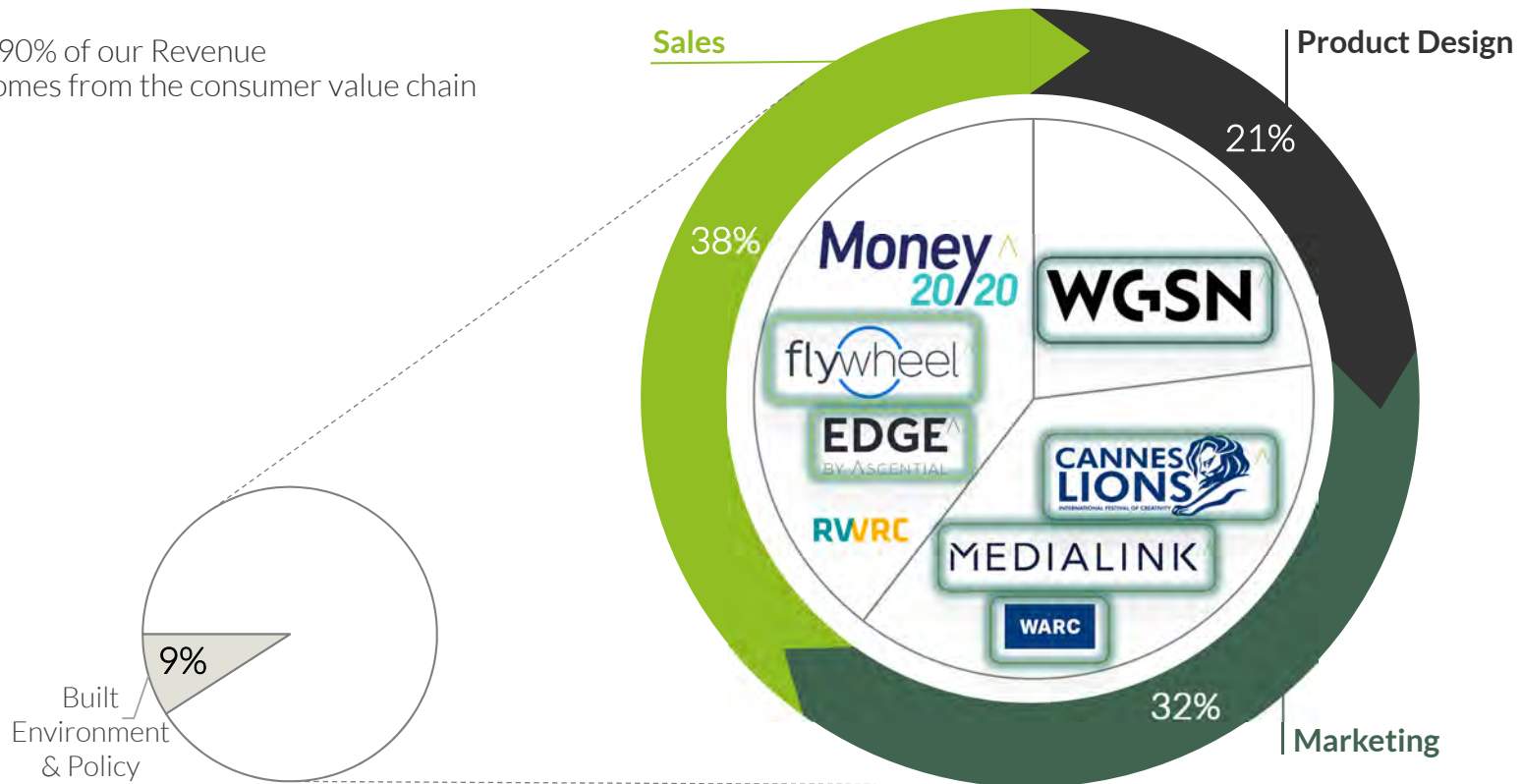

NEW CATEGORIES


NEW GEOGRAPHIES


CROSS-SELL

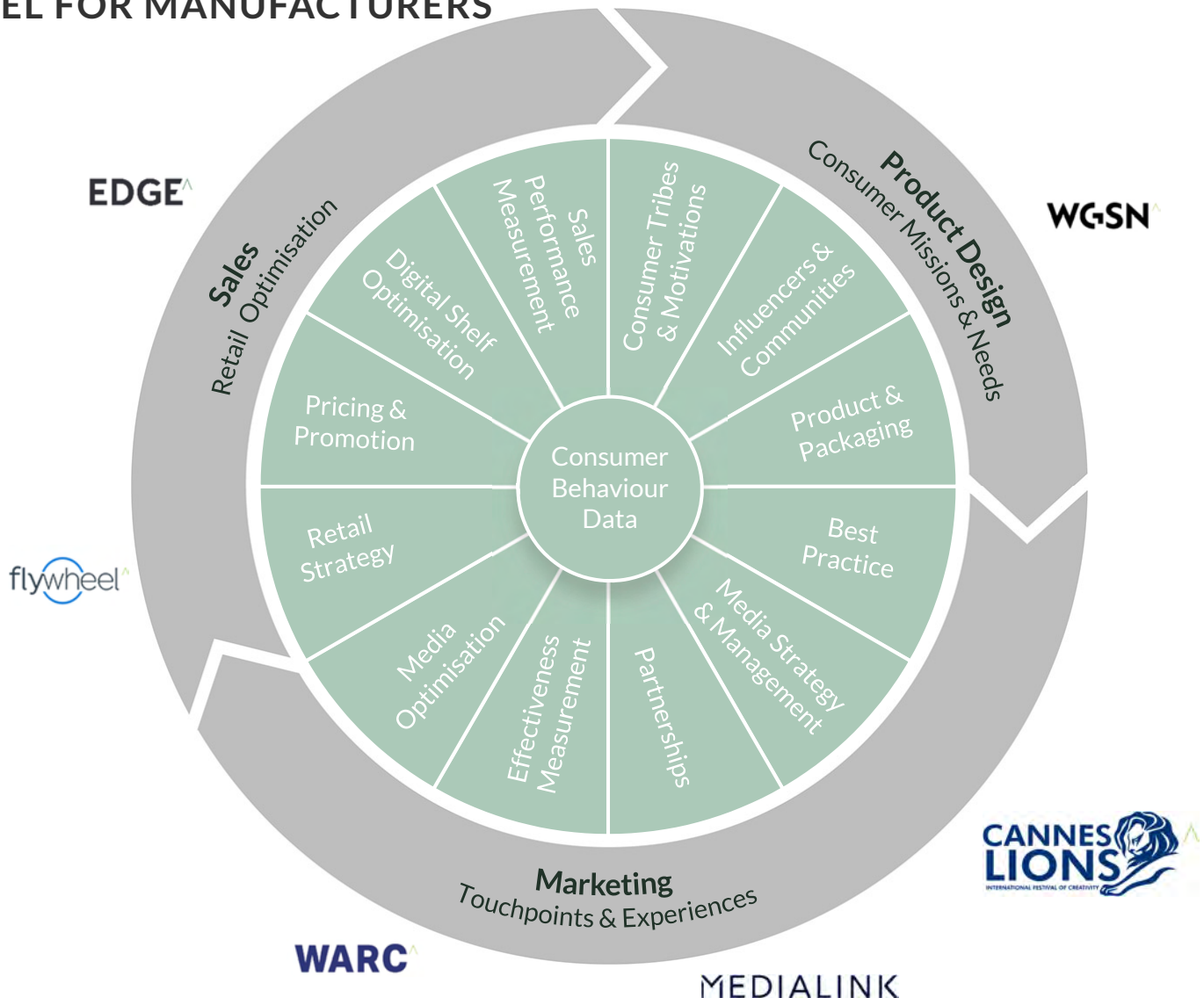

SERVING THE NEEDS OF CUSTOMERS IN PRODUCT DESIGN, MARKETING AND SALES

c.90% of our Revenue comes from the consumer value chain



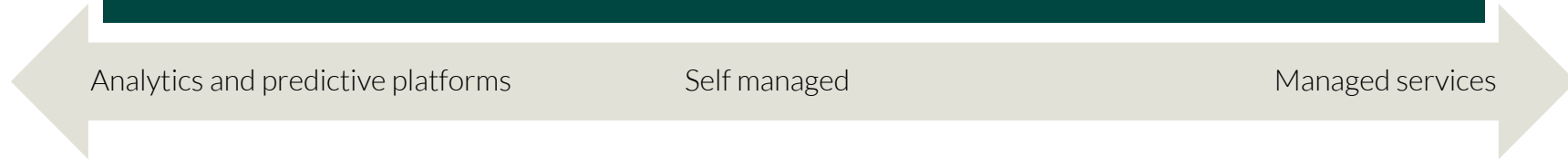
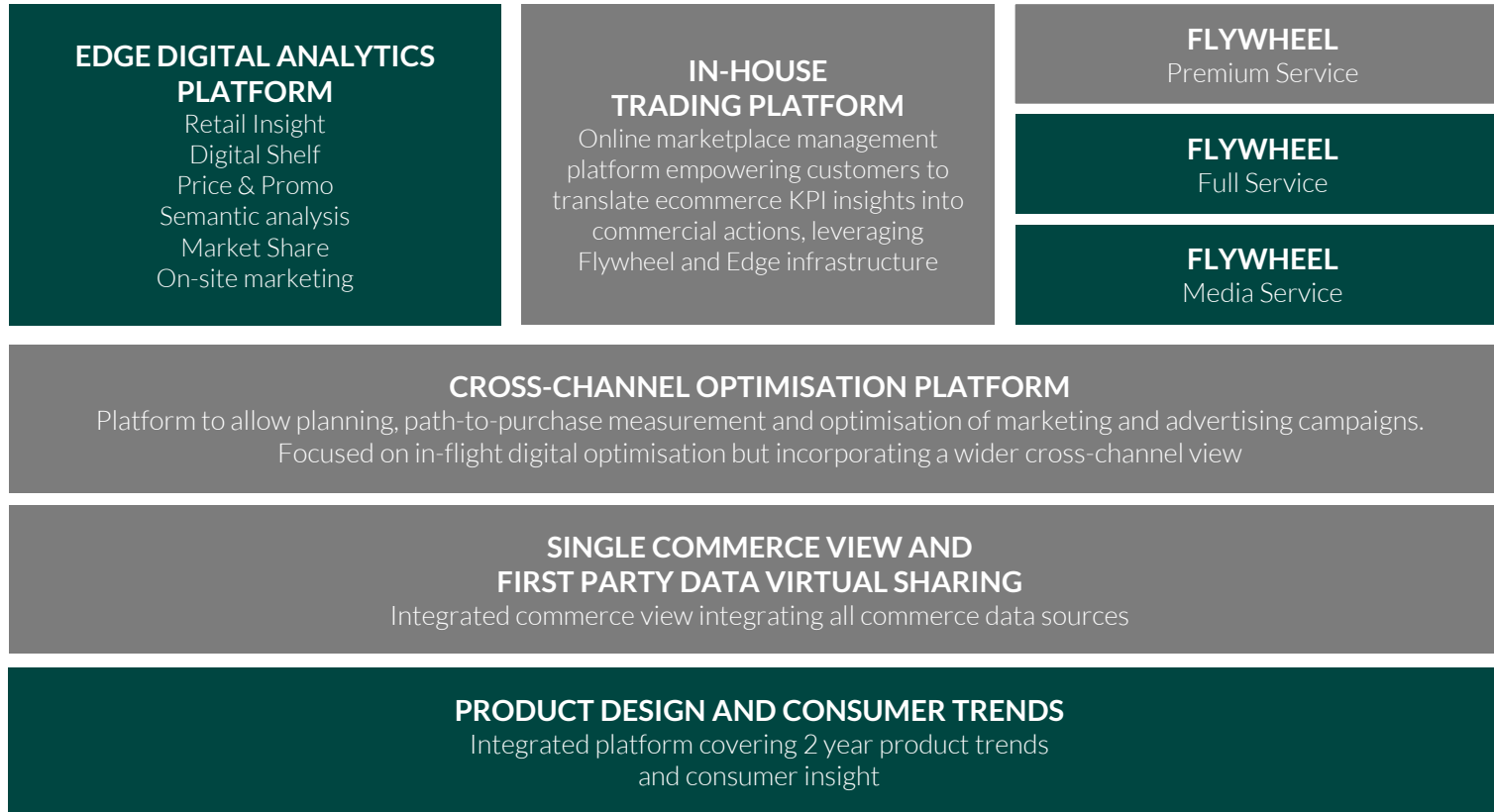
Proforma for WARC, BrandView and Flywheel

CONSUMER PATH-TO-PURCHASE WHEEL FOR MANUFACTURERS

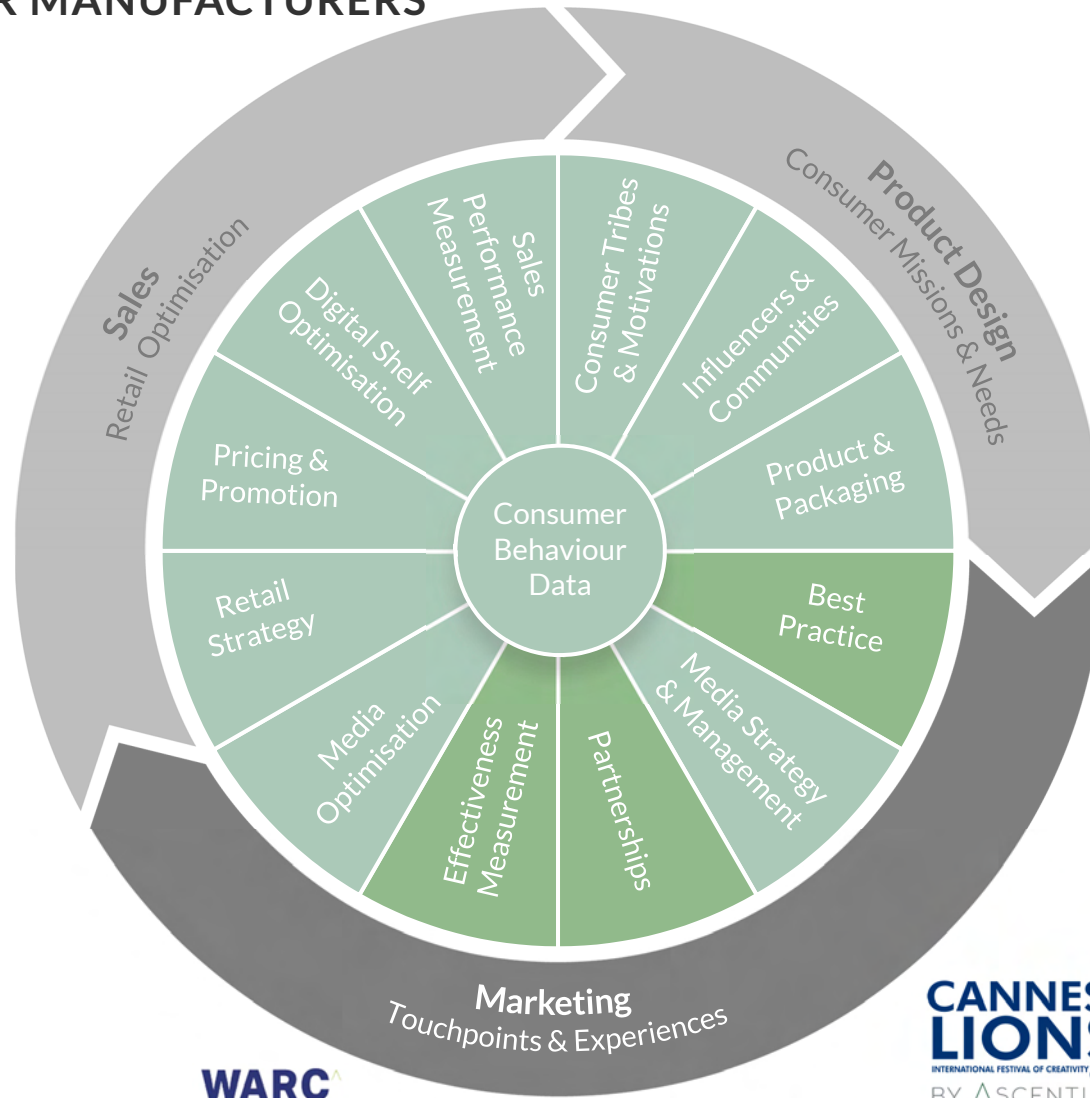


OUR VISION THE ASCENTIAL CONSUMER PRODUCT PLATFORM

Existing
Future development



CONSUMER PATH-TO-PURCHASE WHEEL FOR MANUFACTURERS



REVENUE GROWTH DRIVERS



INTRODUCING

EDGE[^]


BY ASCENTIAL

Michael Lisowski, President, Edge



AGENDA ^

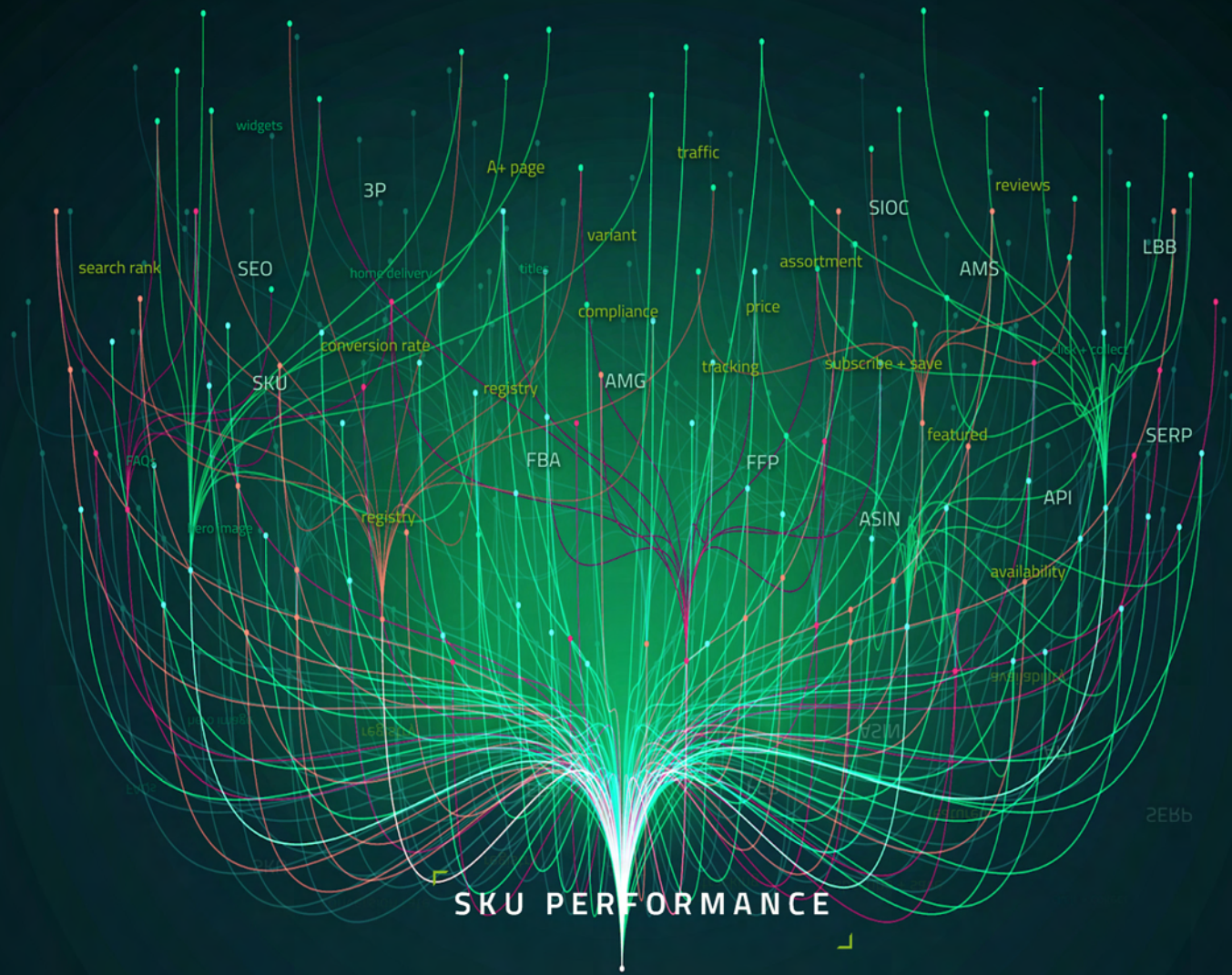
1. Positioning & Growth Opportunity
2. Integration Journey and Progress to Date



Shoppers are no longer just touching the physical shelf...

They're also engaging with an **algorithm**
on an **infinite digital shelf**





SKU PERFORMANCE



OVERALL PERFORMANCE



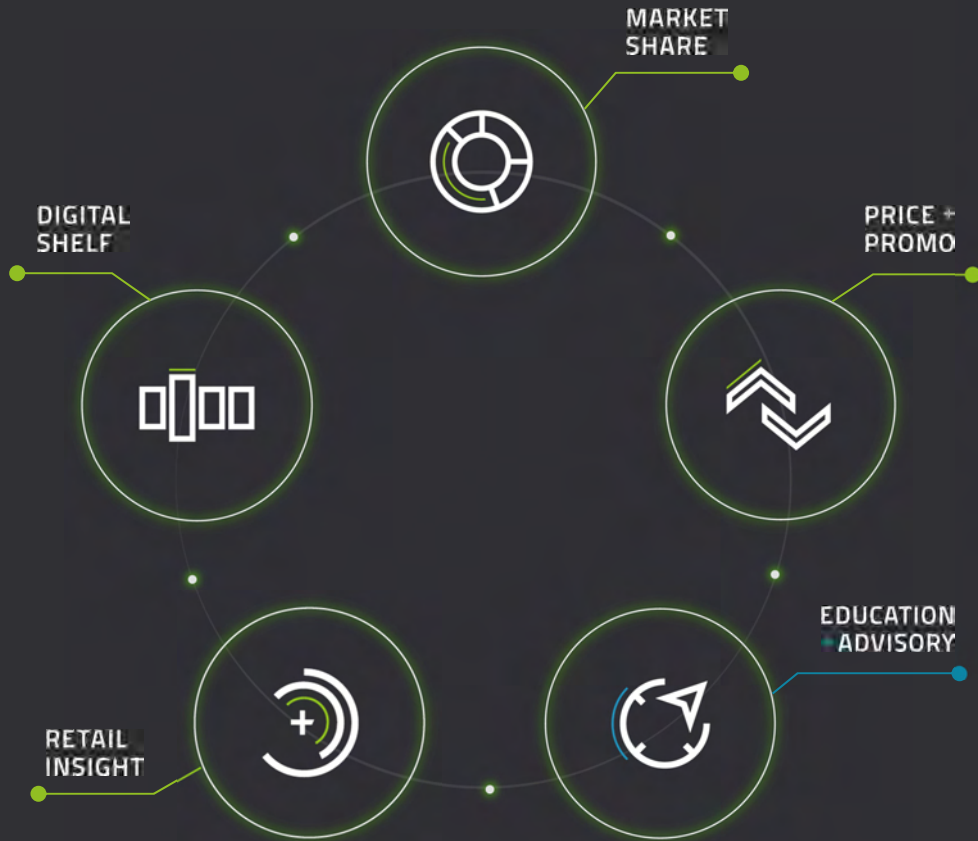
Our technology turns
unstructured data points
into actionable insights

OUR VISION ^

To give our clients the **edge**
they need to win in an
ecommerce-driven world



E^



Our **best-in-class** suite of products enables you to drive sales, grow market share and protect your brand presence

SUSBCRIPTION & ADVISORY PROPOSITION OVERVIEW ^

STRATEGY



EXECUTION



SALES + SHARE



RETAIL
INSIGHT

Generate strategic, channel and organisations plans

- Develop channel strategies
- Identify whitespace transformation plans



DIGITAL
SHELF

Optimise your merchandising to drive sales

- Optimise your products for availability, traffic and conversion
- Optimise promotions (brands and retailers) and price (retailer)



PRICE +
PROMO

Measure the result in your market share (Amazon today)

- Measure the impact of strategy & execution
- Drive sales & share



MARKET
SHARE

DEPTH + BREADTH[^]

Global *capability* and *coverage* to meet your needs around the world



GLOBAL OFFICES



COUNTRIES



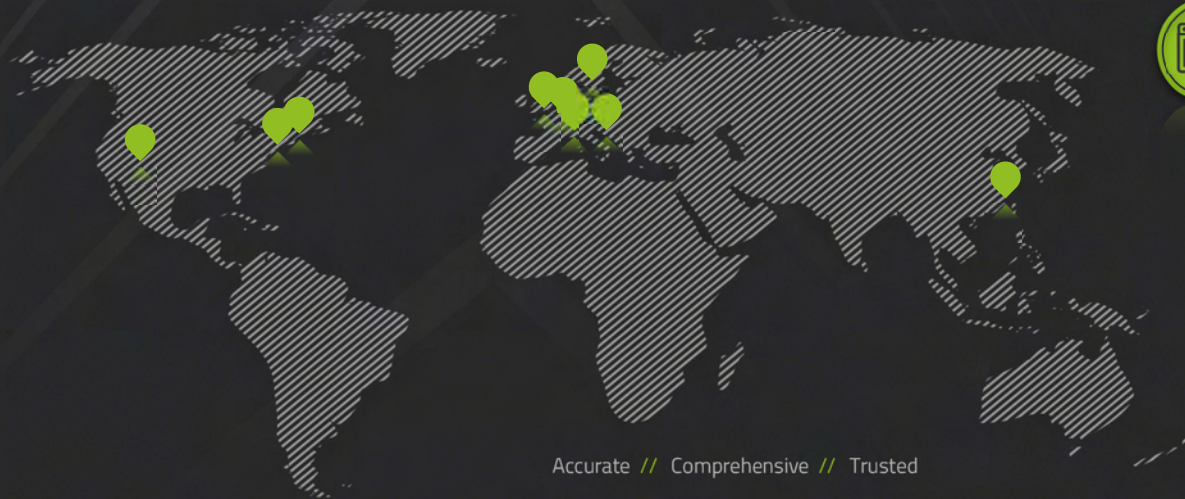
RETAILERS



GLOBAL USERS



WEBPAGES HARVESTED

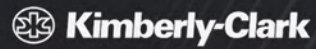


Accurate // Comprehensive // Trusted

TRUSTED BY 600+ BRANDS + RETAILERS ^



L'ORÉAL



Johnson & Johnson



Coca-Cola

Unilever

SAMSUNG

Nestlé

Panasonic

P&G

Kellogg's

Kraft Heinz

amazon

Walmart

Disney

Hasbro



PHILIPS






Campbell's

CUSTOMER CASE STUDY ^

We are helping a global cosmetics company deliver several billion in ecommerce sales and growth >30%

Know. Act. Win.

Edge Services

-  Digital Shelf
-  Market Share
-  Price & Promo
-  Retail Insight
-  Advisory

Coverage

- Local
- Regional
- Global

Market Coverage – 34 markets

- North & South America
- Europe
- Asia

Additional Services

- Global and local AM & Insights teams
- Executive sponsorship
- Hackathons and digital share groups

Customisation





- Customised dashboards
- API to digital cockpit
- Global, regional and local views
- Custom hierarchies & catalogues
- Technical support

CUSTOMER CASE STUDY ^

We are helping a global health & wellness company grow their global ecommerce sales to >\$400m by 2021

Know. Act. Win.

Edge Services

-  Digital Shelf
-  Market Share
-  Advisory
-  Retail Insight

Coverage

- Local
- Regional
- Global

Market Coverage – 18 markets

- North & South America
- Europe
- Asia

Additional Services

- Global and local AM & Insights teams
- Executive sponsorship
- Multiple advisory projects

Customisation

- Customised dashboards
- API
- Global, regional and local views
- Custom hierarchies & catalogues
- Technical support

OPTIMISING THE DIGITAL SHELF IS CRITICAL TO SALES[^]

Availability



Traffic



Conversion



Sales & Share

A Confectionery Case Study



Availability

22% sales loss per week for every day that a SKU is Out of Stock



Content Accuracy

31% uplift in sales for each week SKU is content compliant



Promotions

6% sales increase per week per day of promo offer



Search

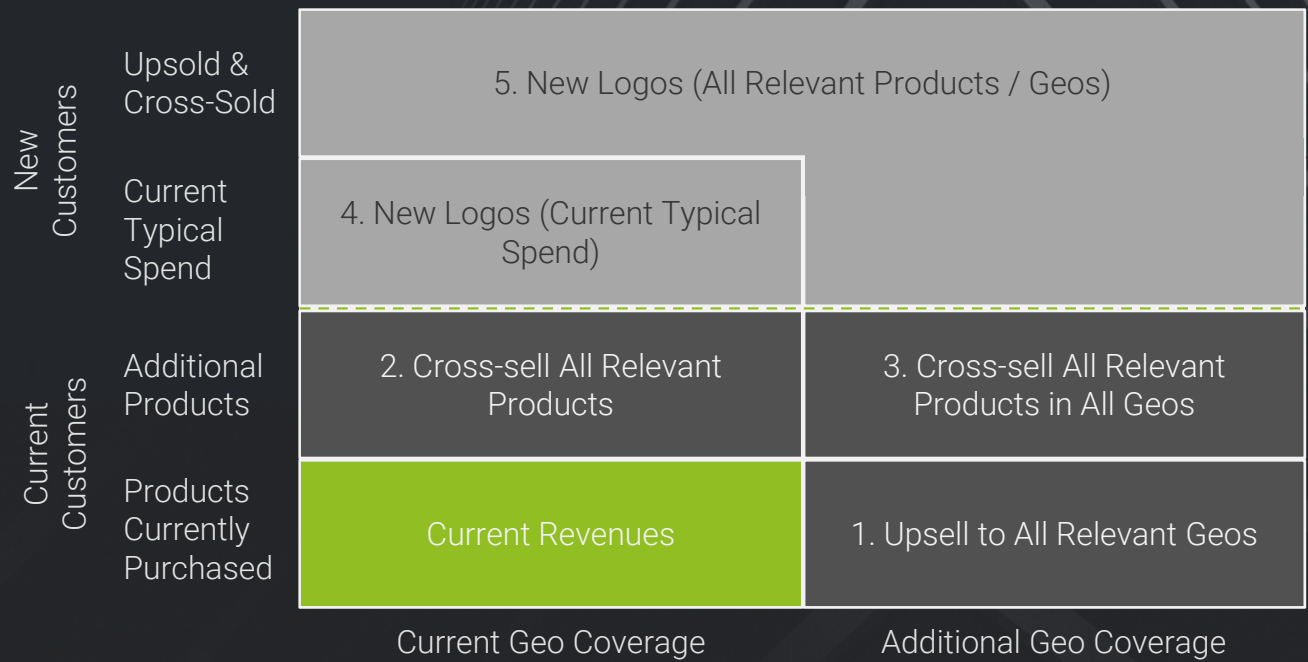
65% sales increase moving from 20th to 10th position



Reviews

5% sales increase per 10 additional reviews
9% sales increase per +0.5 star rating

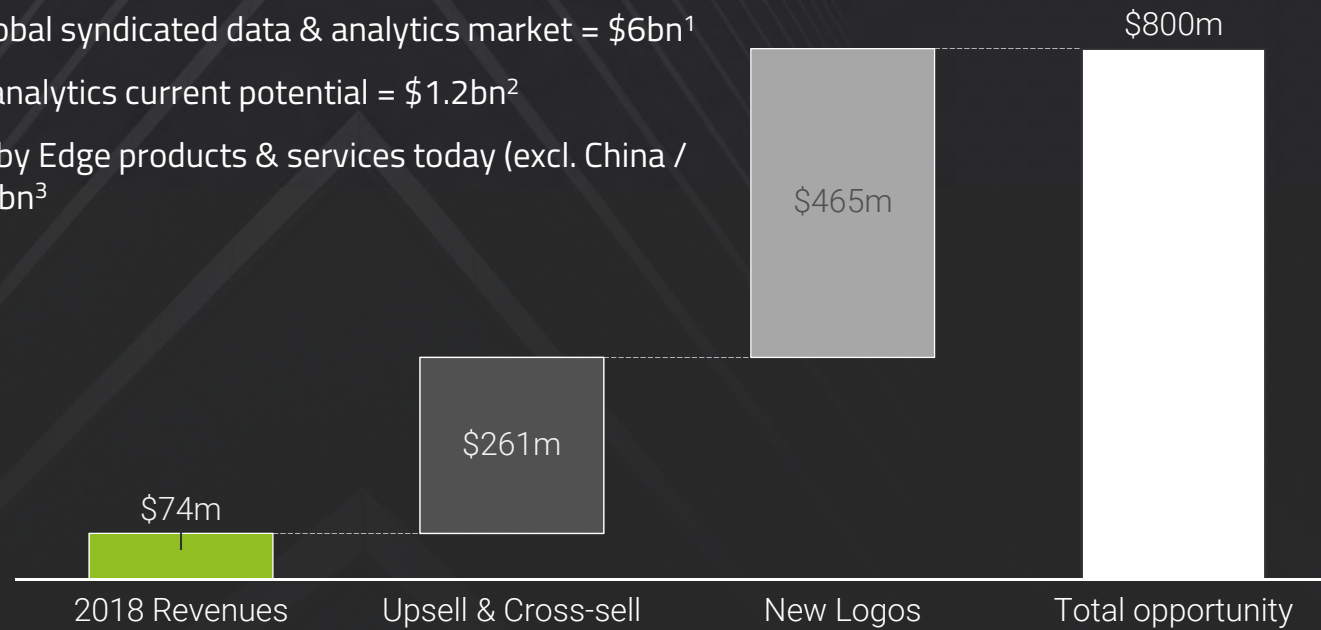
BREAKDOWN OF EDGE OPPORTUNITY ^



REVENUE OPPORTUNITY AND MARKET SIZING ^

Commentary

- Estimated global syndicated data & analytics market = \$6bn¹
- Ecommerce analytics current potential = \$1.2bn²
- Addressable by Edge products & services today (excl. China / APAC) = \$0.8bn³

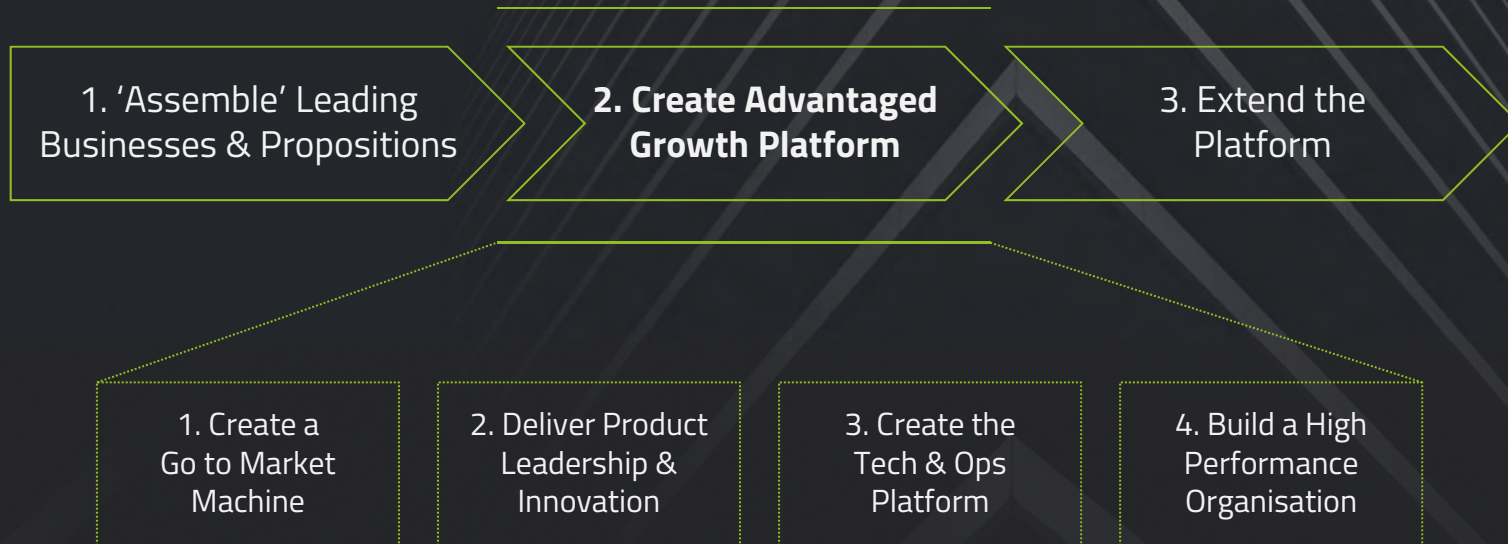


1. Source: e-marketer, company financials, PwC analysis; Ascential analysis; 2. Assumes ecommerce analytics spend should be proportionate to ecommerce as percent of chain retail sales (i.e. 20% of market); 3. Bottom up number of addressable companies times assumed revenue per customer

AGENDA ^

1. Positioning & Growth Opportunity
2. Integration Journey and Progress to Date




STRATEGIC JOURNEY ^





EDGE[^]
BY ASCENTIAL

Thank you

-  info@ascentiaedge.com
-  www.ascentiaedge.com
-  [@edgeascential](https://twitter.com/edgeascential)

KNOW ACT WIN

flywheel[^]

BY ASCENTIAL

INCREASE VISIBILITY. AMPLIFY SALES.



DEDICATION

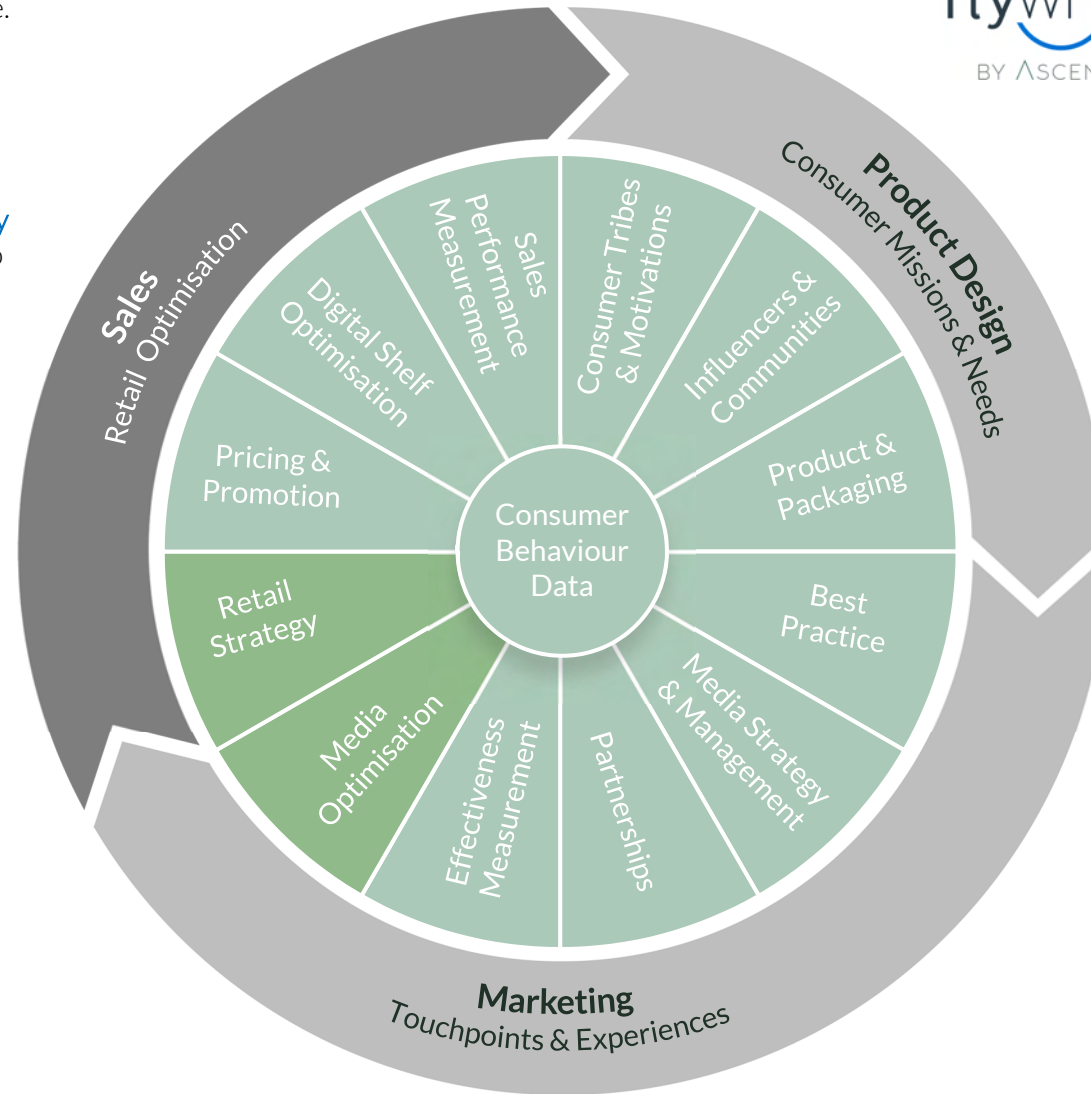
We've spent years solely focused on deconstructing the Amazon machine.

EXPERIENCE

We've helped **hundreds of brands**.

TECHNOLOGY

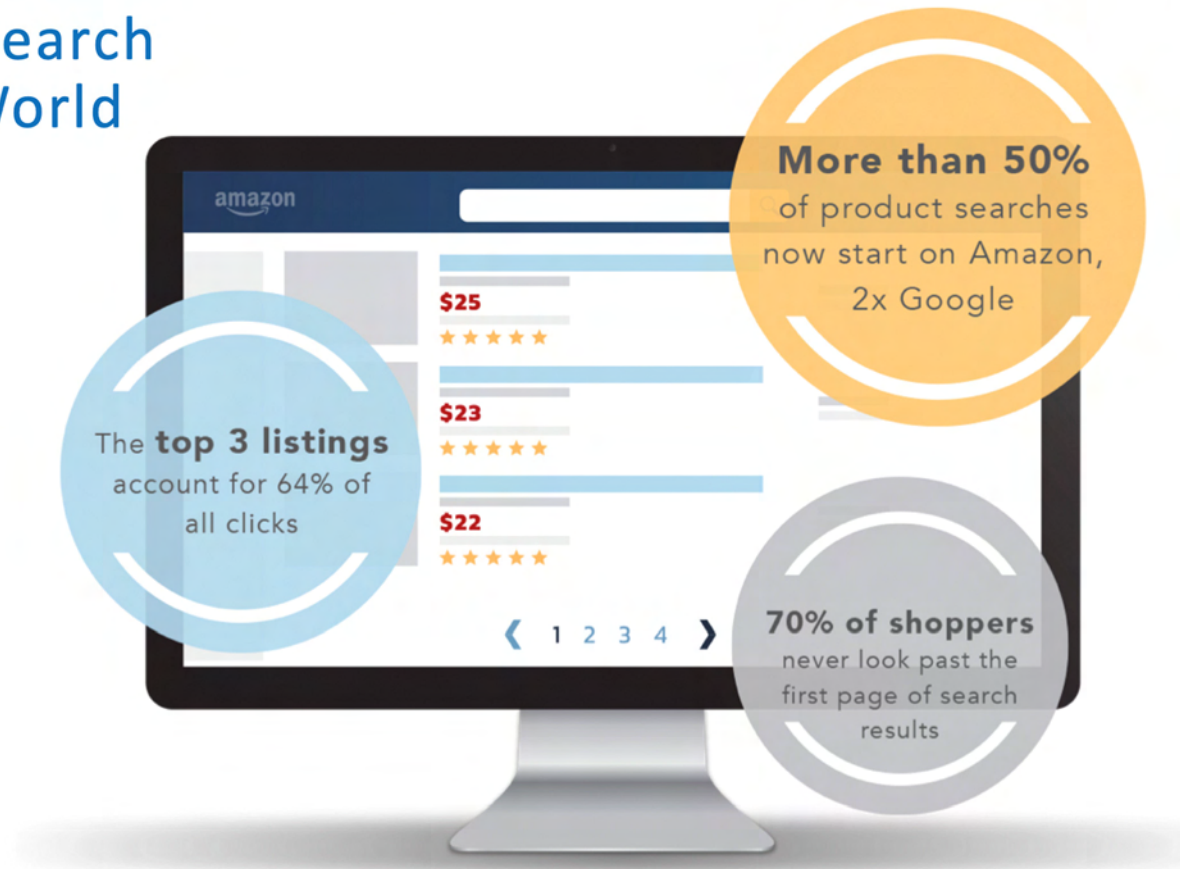
We've invested heavily in **technology and analytics** that allows our team to manage massive amounts of data at scale.





CRaP; Cannot Realise a Profit, PDP; Product Detail Page

It's a Search First World



The screenshot shows a video player interface. On the left, there is an orange 'amazonadvertising' logo. The main content area displays the Forbes logo at the top, followed by navigation links: 'Billionaires', 'Innovation', 'Leadership', and 'Money'. Below the navigation, it shows '7,370 views | Feb 20, 2019, 03:01pm'. The article title is 'Why Brands Are Flocking To Amazon Advertising'. The author is 'Kiri Masters Contributor', with a 'Retail' tag and a bio: 'I cover online marketplaces from a retail brand's perspective'. At the bottom left of the video frame, it says 'Business Insider June 4, 2019'.

BY THE NUMBERS

\$10.1 Billion 2018

36% YOY

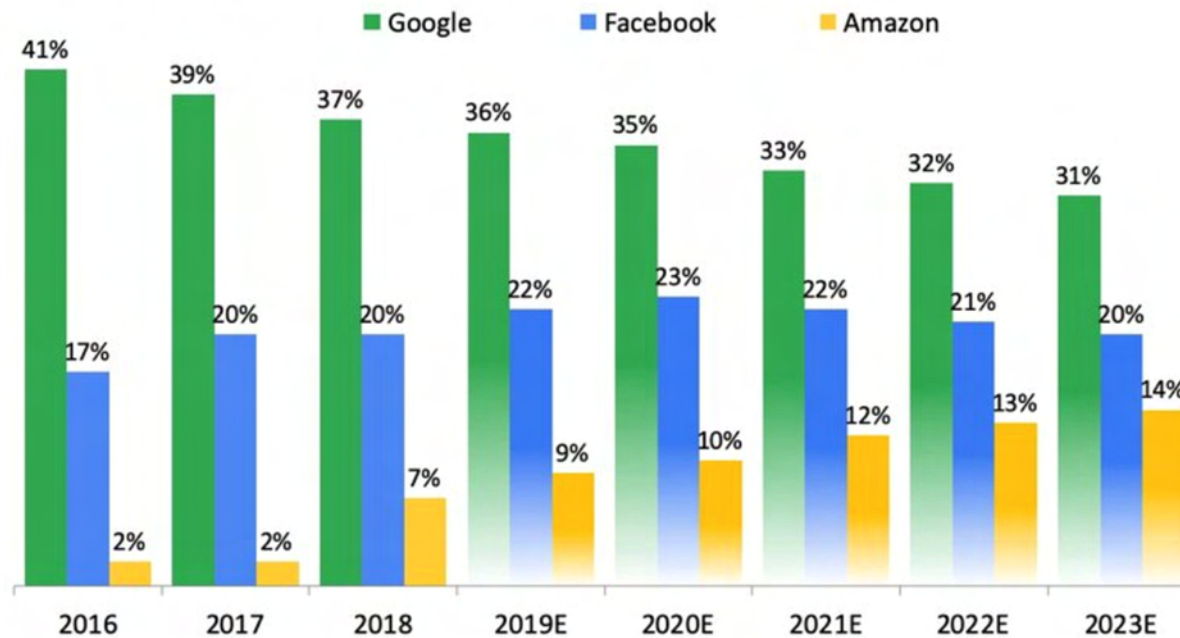
Estimated 14% 2023 Digital ad totals

Potential to tap \$70 billion TV ad market with OTT streaming video on FIRE and other assets

OTT-Over the Top (delivered over internet)

Amazon Share Of US Digital Advertising Vs. Duopoly

Percent of the US digital ad market, by platform



Note: Google includes ad revenue from YouTube; Facebook includes Instagram. Includes advertising that appears on desktop, mobile, and other internet-connected devices, across all ad formats; after paying traffic acquisition costs (TAC) to partner sites.

Source: eMarketer, Business Insider Intelligence, 2019

BUSINESS
INSIDER
INTELLIGENCE

Business Insider Intelligence

LEVERS FOR GROWTH



NEW MARKETPLACES



THE WALL STREET JOURNAL.

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[BUSINESS](#) | [MEDIA & MARKETING](#)

Walmart Joins Amazon in Chase for Ad Dollars

Retail giant wants to sell more digital and store ads based on its shopper data

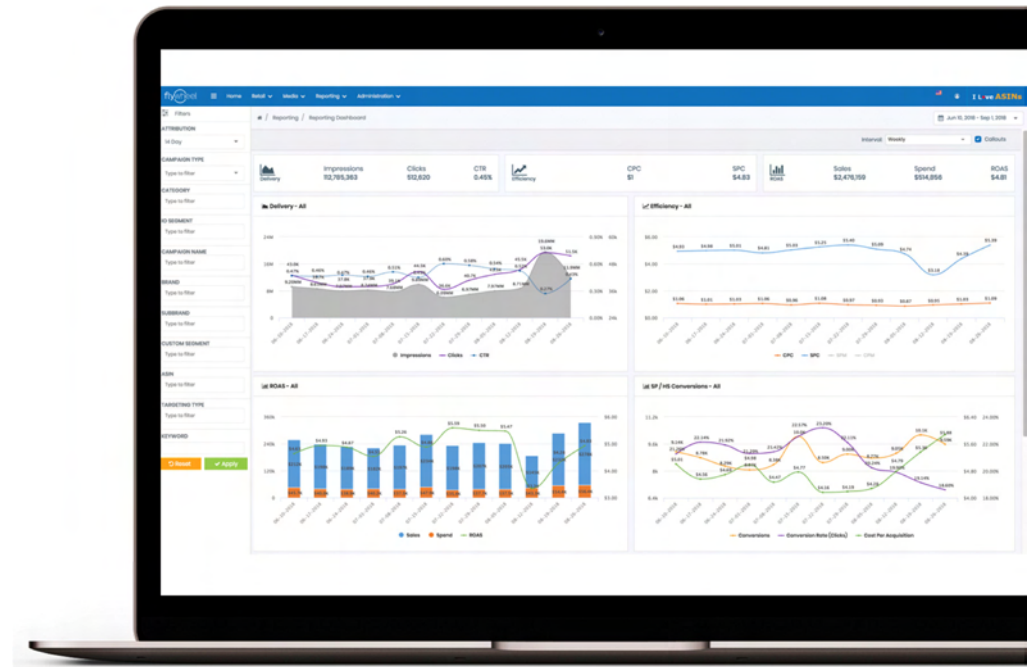


DEVELOPMENTS SINCE ACQUISITION

NOVEMBER 2018



- Significant investment and growth of tech team
- Development of European team & office
- Launched in Japan & Australia
- Launching Walmart Search Services
- Ascential Brand Collaboration
- Debut at Cannes Lions targeting brand CMOs





THANK YOU

/ BREAK & PRODUCT
DEMONSTRATION



WGSN[^]

BY ASCENTIAL



AN INTRODUCTION



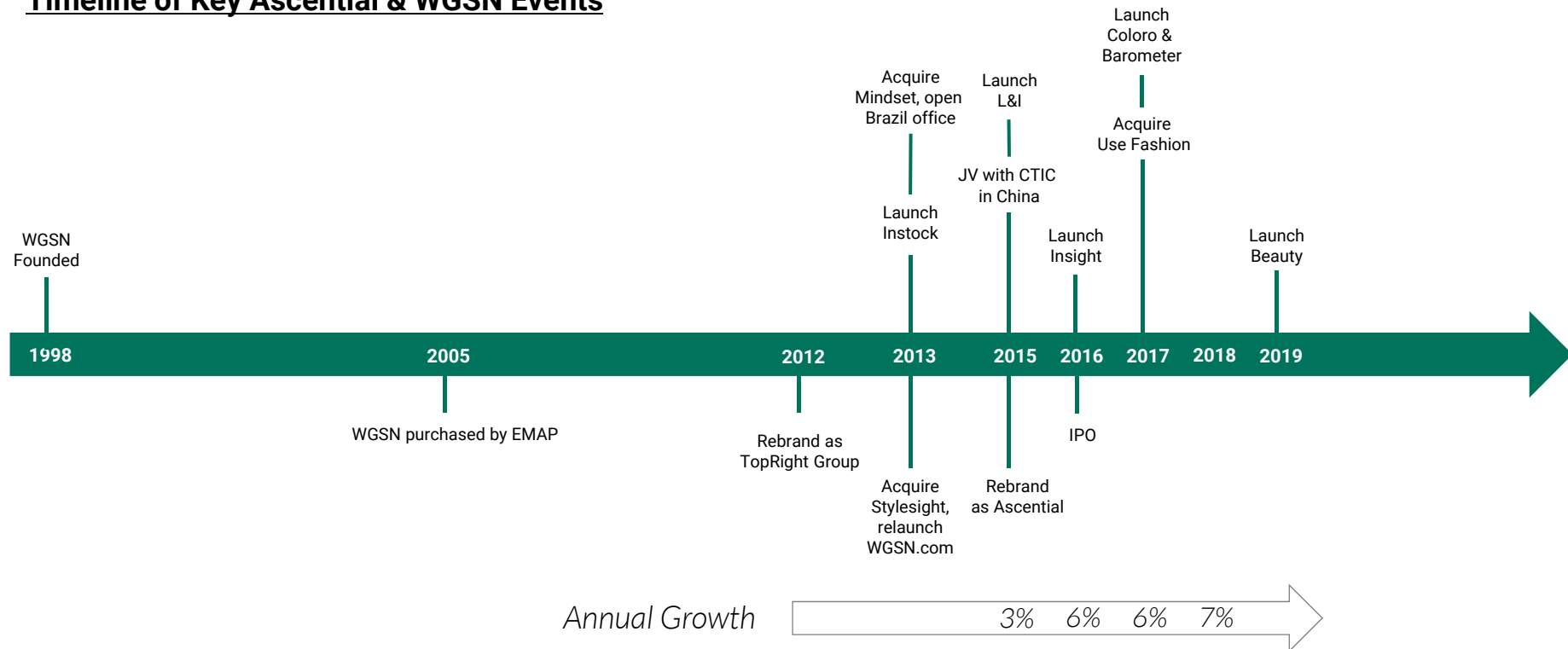
Carla Buzasi
Managing Director



Bernard Johnson
SVP, Global Revenues

Our strategy of improved global reach, adding categories and extending our offering is **delivering growth**

Timeline of Key Ascential & WGSN Events



OUR MISSION

We enable brands and businesses across the globe to create **the right products at the right time to the benefit** of the **consumer**, their **bottom line** and the **planet**

How we do it

We do this by tracking macro trends, translating these into consumer profiles and then predicting consumer demand, ensuring brands understand what products to create and when across the four key pillars of product design: *colour, materials, formulation and packaging*

Why are we at Cannes Lions...?

Deliver consumer trends/insights to the Cannes Lions audience



Report on marketing trends for the WGSN audience



Meet with prospects and clients



How WGSN fits into the Ascential customer journey?

Our key strengths lie in delivering deep consumer insights and how to create the products to feed consumer demand.

We are the jumping off point for the consumer product lifecycle.

The rules of product design are broadly in line across industries giving us the opportunity to expand out of our fashion heritage and into new markets.



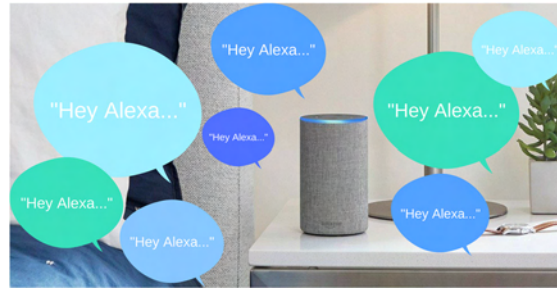
The major themes of market change

Retail landscape



- Crisis hitting traditional retail
- Economic pressure to:
 - Reinvent bricks & mortar in the face of record store closures
 - Concurrently run multiple channels
- Ecommerce to reach 30-45% by 2022
- New dominant retail geos – China overtaking US in many markets, including apparel
- New players, new winners in marketplaces and social commerce

Digital consumer



- Consumer expectation around speed and convenience
- Consumers will become hyper-connected with uptake of 5G
- Voice becoming mainstream
- Wechat replacing email in China

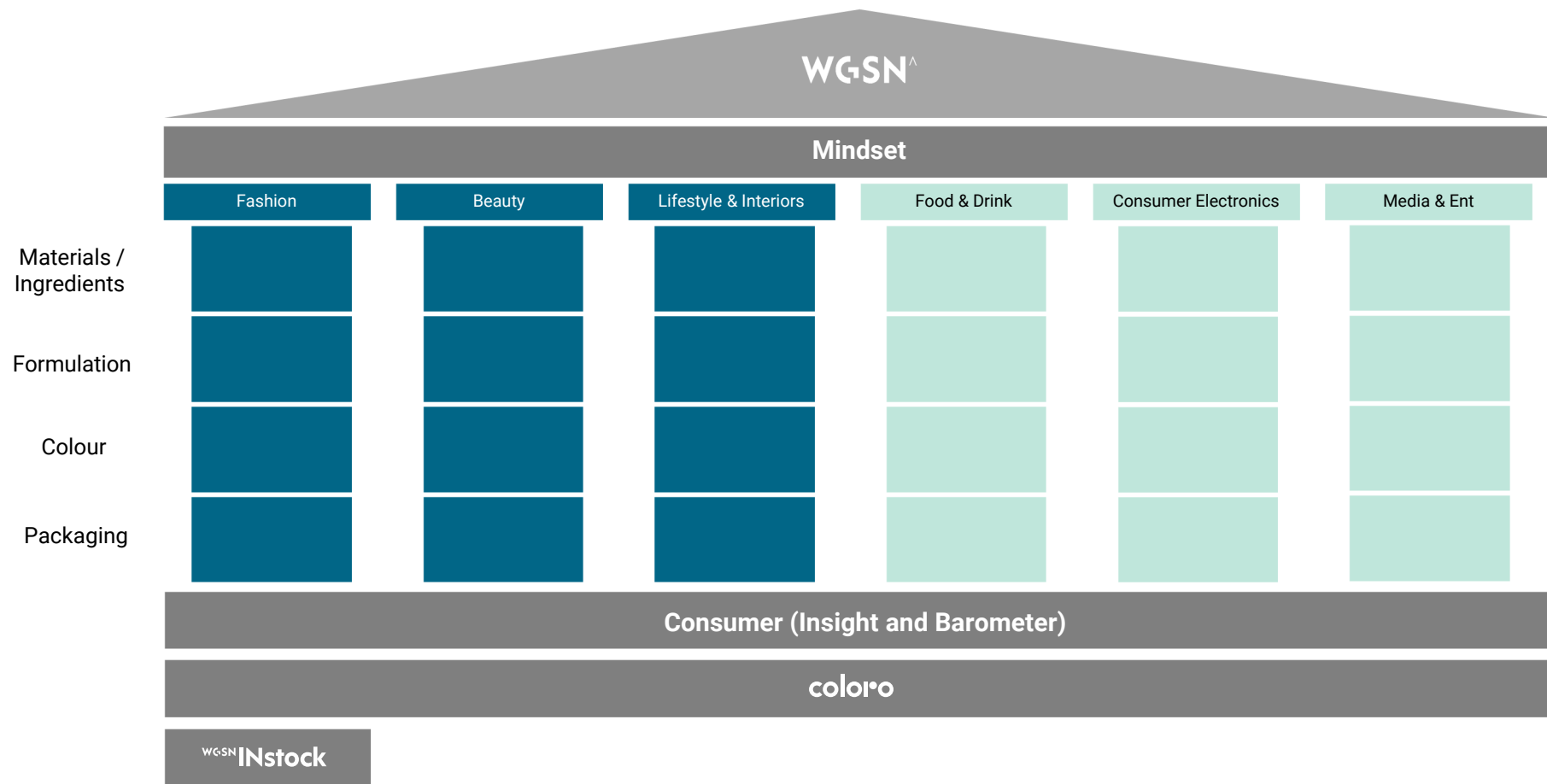
Sustainability




- Consumer demand for transparency around ethics and sustainability
- Shift towards sustainable sourcing and design with end-of-life in mind
- Businesses facing pressures around regulation, employee attraction & retention and need to reinvent business models
- Longer-term exposure as consumption declines and consumers 're-set' expectations

Launch new categories

Our vision is to roll out new industry verticals with WGSN Insight as the common foundation



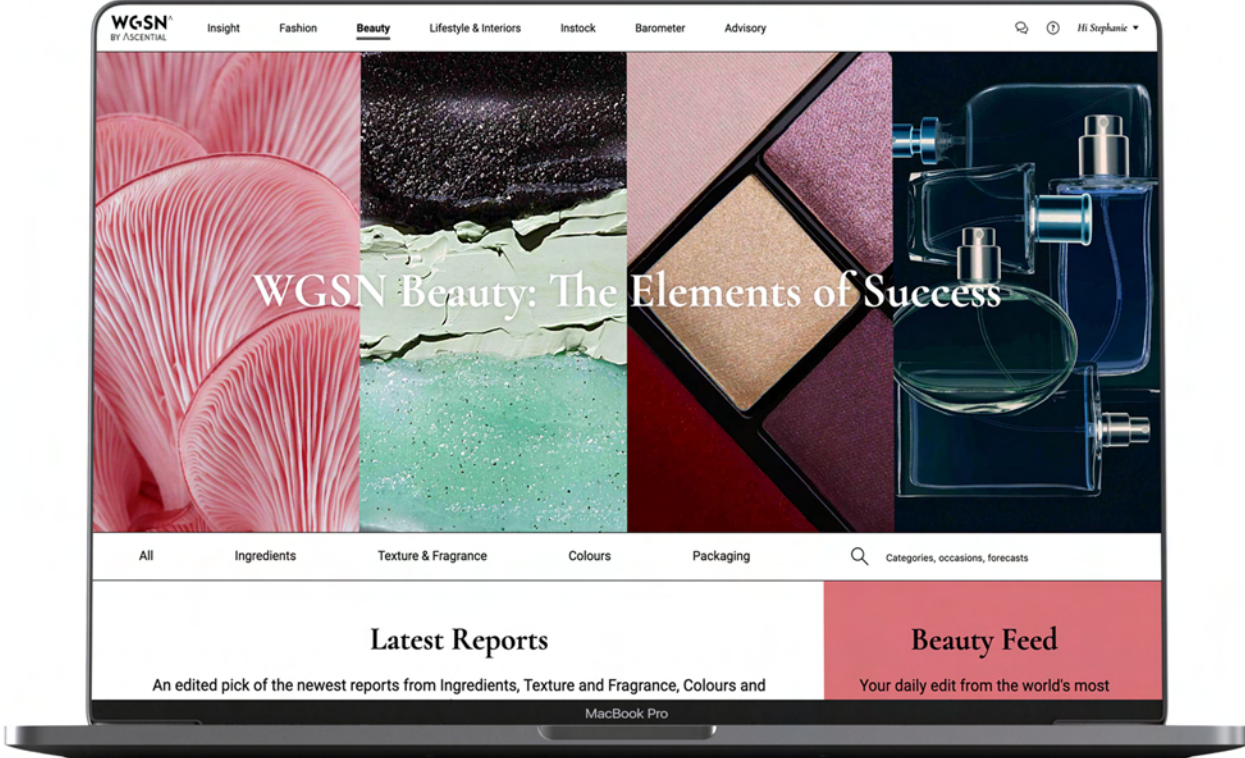
WGSN Beauty



COLOURS · 05.31.19

Emerging Trend: Garden Brows

Turn your attention to products for brows. This nature-inspired trend encourages colourful palettes and floral applications – key for this festival season



WGSN BY ASCENTIAL Insight Fashion **Beauty** Lifestyle & Interiors Instock Barometer Advisory

WGSN Beauty: The Elements of Success

All Ingredients Texture & Fragrance Colours Packaging

Categories, occasions, forecasts

Latest Reports

An edited pick of the newest reports from Ingredients, Texture and Fragrance, Colours and

Beauty Feed

Your daily edit from the world's most

MacBook Pro

Expanding addressable market

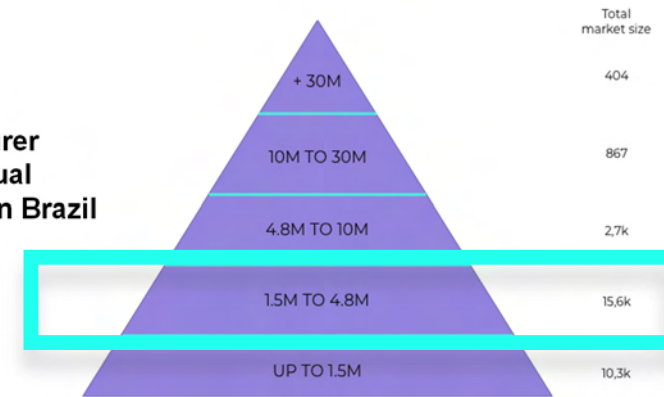
We have bought a low-cost trend product in Brazil and will roll this out to other geos

There is a potential prize of more than 15k companies to be addressed in Brazil.

Results so far are positive: YTD'19 projected growth Vs 17:

- NB + 108%
- RW +34%
- Value RR% from 67% to 78%

Retailer + manufacturer fashion market (annual revenue in BRL mi) in Brazil

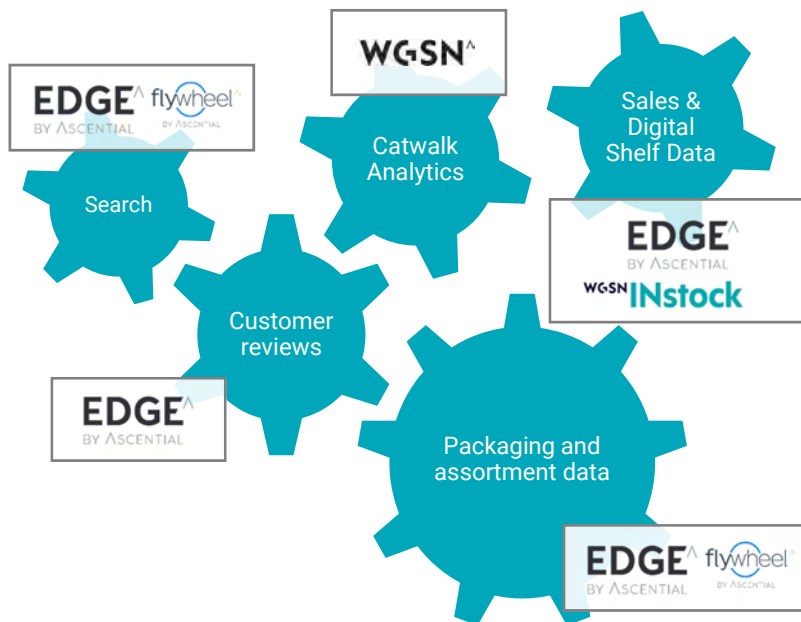


	<i>Key differences</i>	WGSN Fashion	Use Fashion
Customer	Size	Medium to large	Micro to small
	Annual billings	> BRL 5 million	< BRL 5 million
	Commercial strategy	Brand oriented	Product oriented
	Target	Defined	Diverse
	Product launch	By collections	Random
Product	Research travelling	International	National
	Anticipation	2 and a half years	Up to 1 year
	Customer support	Content specialist online and in person	Product support online
	Data analysis	Yes	No
	CADs and prints & graphics	Yes	No

Data

WGSN is uniquely advantaged to create unique insight and solutions for our customers using Ascential data

Data Community → Ascential Data Centre of Excellence



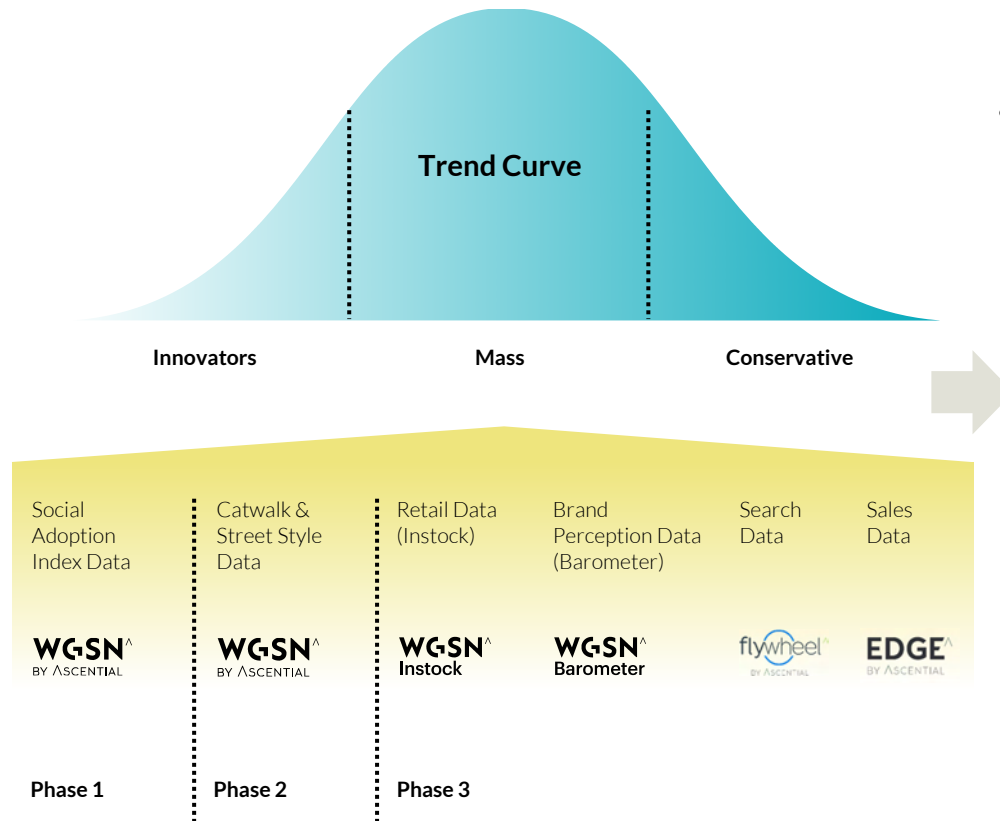
Leveraging analysis of these sources we can:

- 1) Add Value to our Subscription Business
 - e.g. statistics on key items embedded in reports such as the Buyers' Briefing
 - Buyers need validation on purchasing decisions
 - Reinforces credibility
 - Marketing funnel into Advisory
- 2) Drive Consulting
 - e.g. Custom Mindset Project for global sportswear brand on the customer journey - used Instock combined with the brand's own data to understand where shoppers drop off on the path to purchase
 - Ensure we are not leaving money on the table vs syndicated research via Nielsen, Kantar, etc
- 3) Build New Products
 - See next section for more detail

The trend curve, data & tools

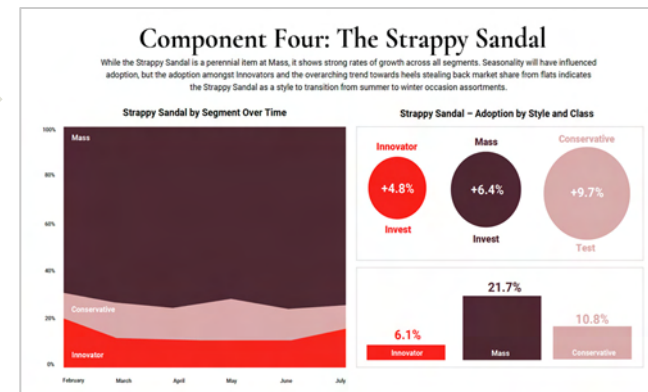
The trend curve could uniquely combine various data sets to serve a key client need

The Trend Curve Concept



- Initial proof of concept and first versions will be fashion-focused given the strength of our existing data sets, customer base, and industry fit for this methodology
- However we plan to replicate for beauty etc. in subsequent iterations and there is potential to apply the same approach for macro consumer demographic trends (eg for Insight)

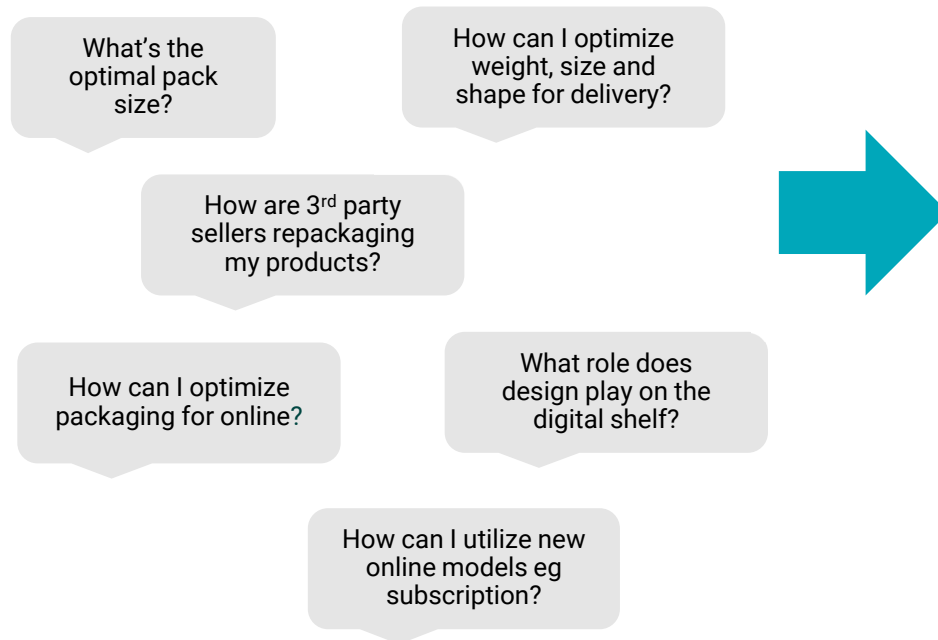
Example output from proof of concept



Product design for ecommerce

There is an opportunity to develop new propositions specifically for ecommerce design

Example Customer Questions - Product Design for Ecommerce



Example Propositions

Search back / reviews – using search data and product reviews to identify gaps that consumers have identified or are searching for

3rd Party Sellers – monitoring sales across channels to advise product creators are re-formatting / re-packaging their products

Product design consulting – build on the type of recommendations that Flywheel provide as part of their full-service offering

Executive summary

In line with the broader unified Ascential strategy and market trends, we are taking a two-fold approach for the Product Design segment: extending into new markets and building out data analytics and tools.

We will continue with our global expansion, focusing on China and India and rolling-out Use Fashion

- This will focus the growth of our core product in the leading global markets of the future.
- Our low-cost product captures the opportunity at the lower end as the market polarises.

Following the successful launch of Beauty, we will continue with our category build out, with Food & Beverage up next

- This harnesses the strength of the wider Ascential portfolio in FMCG and leverages the wealth of data available in the category.

We will continue to build our data and analytics capabilities...

- Starting with the Trend Curve which will combine data sources unique to Ascential and answer a key client need.
- More broadly, we are investigating additional propositions focused on designing for ecommerce.

...and tools to reinforce and build-out the core

- We will continue to grow Coloro, building on the success of this tool for our customers.
- We are investigating opportunities in consumer insight validation.

Trend Predictions 2020

WGSN
BY ASCENTIAL

Aronia Berries



WGSN
BY ASCENTIAL

Scandinavian Design



WGSN
BY ASCENTIAL

Life *Doulas*



WGSN[^]
BY ASCENTIAL

Lab-grown Diamonds



WGSN
BY ASCENTIAL



THANK YOU

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Bernard Johnson
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JUNE 2019

MEDIALINK - UPDATE

MEDIALINK[^]
BY ASCENTIAL

NEW YORK

LONDON

CHICAGO

LOS ANGELES

SAN FRANCISCO

MEDIALINK CAPABILITIES

**CAPABILITIES
OVERVIEW**



MEDIALINK CAPABILITIES

CAPABILITIES OVERVIEW

Marketplace Development

Enhancing product, visibility, connections and differentiation

- Business Acceleration
- Industry Marketing
- Event Strategy
- Sales Training

Technology Application

Implementing next gen data and technology solutions

- Technology Assessment
- Future-State Strategy Development & Stack Design
- Formulation of Data/Tech Solutions

Brand Transformation

Sharpening brands for an evolved marketplace

- Brand Strategy & Execution
- Curated Journeys
- Partnership Curation & Ways of Working

Investor Strategies

Informing investment & acquisition plans

- Prospect Identification & Evaluation
- Exposure Analysis and Strategy
- Operational and Commercial M&A Due Diligence
- Sell-Side Advice

Agency Optimization

Aligning the brand client-agency ecosystem to maximize performance

- In-House Agency Design
- Global Agency Orchestration
- Agency Pitch Management
- Agency “Therapy”

Talent and Organization

Building and revitalizing teams for change

- Organizational Design
- Capability Assessment & Training
- Executive Search
- Talent Advisory

TALENT MANAGEMENT, DEVELOPMENT AND EMPOWERMENT

PRACTICE BUILDING THROUGH WORLD-CLASS TALENT HIRES ALIGNED WITH MARKET NEEDS

EXECUTIVE SEARCH



Shortell joined MediaLink from RSR Partners, a boutique search firm where she led the Marketing Services Practice. Shortell's career spans 25 years in executive search. Prior to her role at RSR Partners, she spent more than a decade at WPP as senior vice president, executive recruiting and talent management. Her earlier recruiting experience comprises both search firm and client-side roles. At Heidrick & Struggles, Shortell executed searches for clients ranging from entrepreneurial start-ups to multi-national corporations, was a training and development faculty member and initiated a firm-wide process for enhancing diversity efforts.

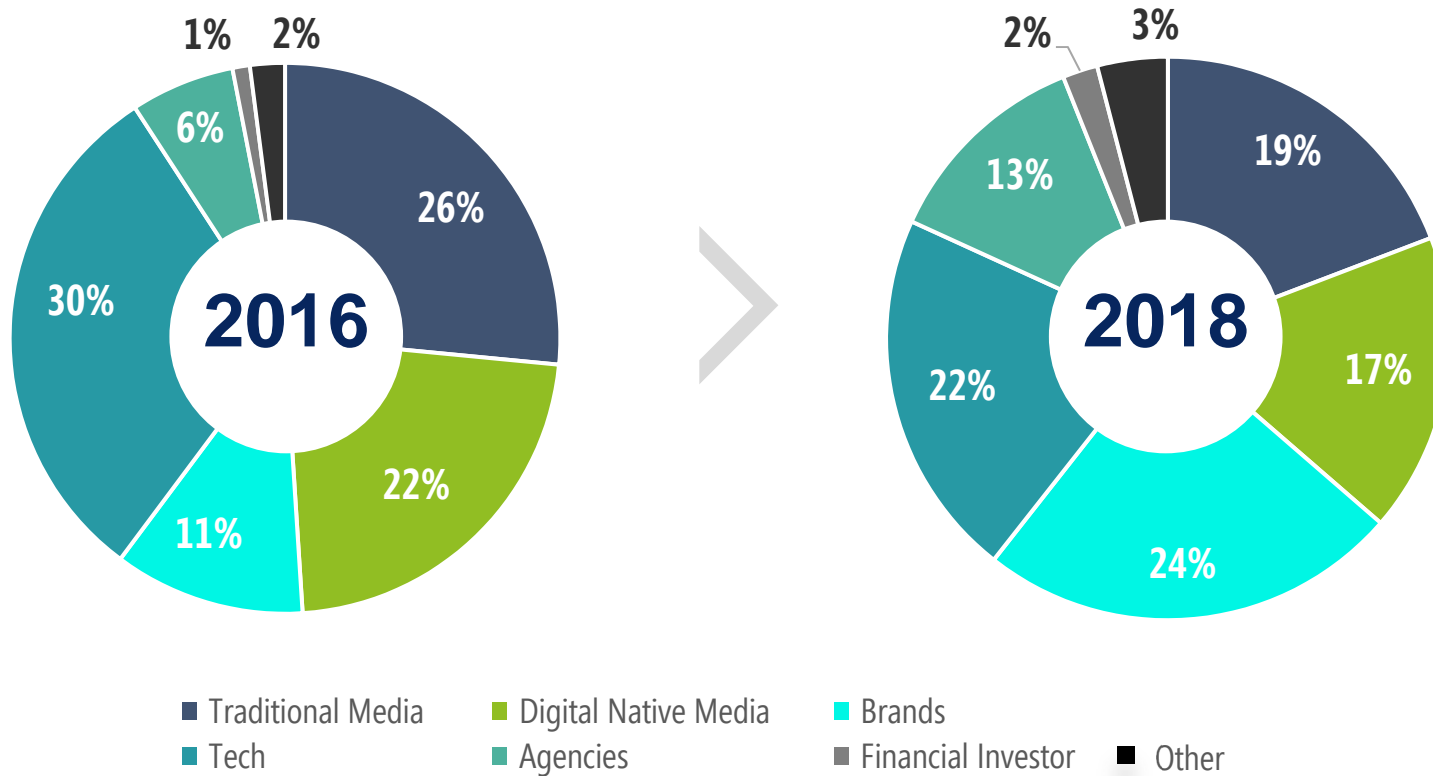
CORPORATE
TRANSFORMATION



As a senior member of MediaLink's leadership team, Vollmer advises clients in media, entertainment, sports, and marketing services on corporate strategy and business transformation, new revenue models and growth acceleration, and business development including partnerships and acquisitions. Vollmer has more than two decades of consulting and advisory experience. He joins MediaLink from Strategy&, PwC's strategy consulting business that was formed in 2014 after PwC acquired Booz & Co., where Vollmer was a partner and the leader of its global entertainment and media practice.

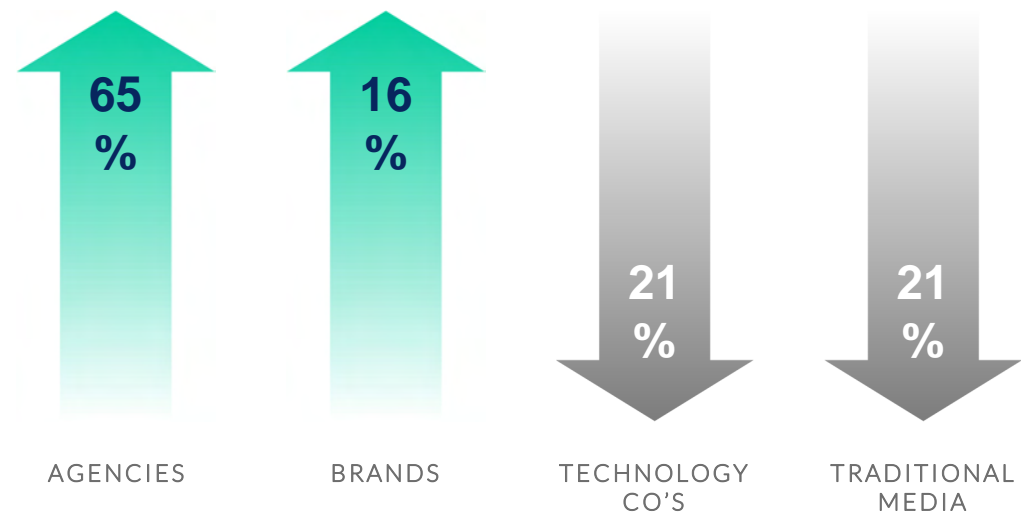
SHIFTING REVENUE ALONGSIDE MARKET REALITIES

CHANGES IN REVENUE BY CLIENT TYPE



SHIFTING REVENUE ALONGSIDE MARKET REALITIES

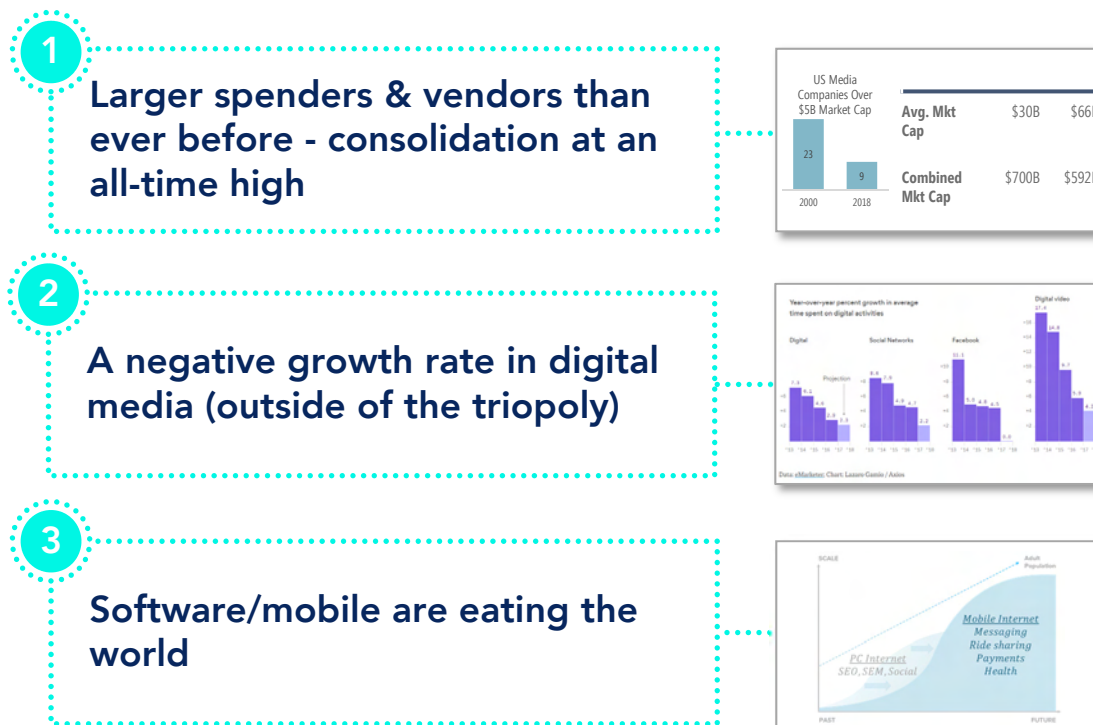
CHANGES IN YOY REVENUE BY CLIENT TYPE¹



1. 2018 vs 2017

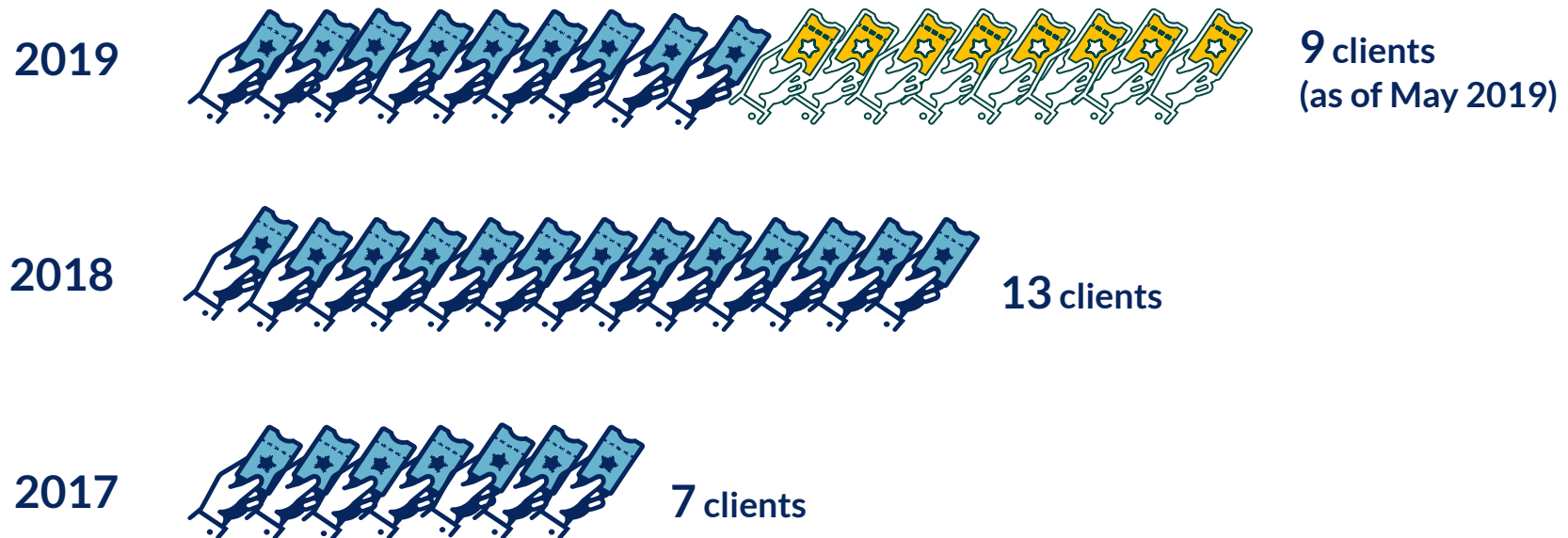
SHIFTING REVENUE ALONGSIDE MARKET REALITIES

MARKET REALITIES ARE CHANGING OUR CUSTOMER BASE



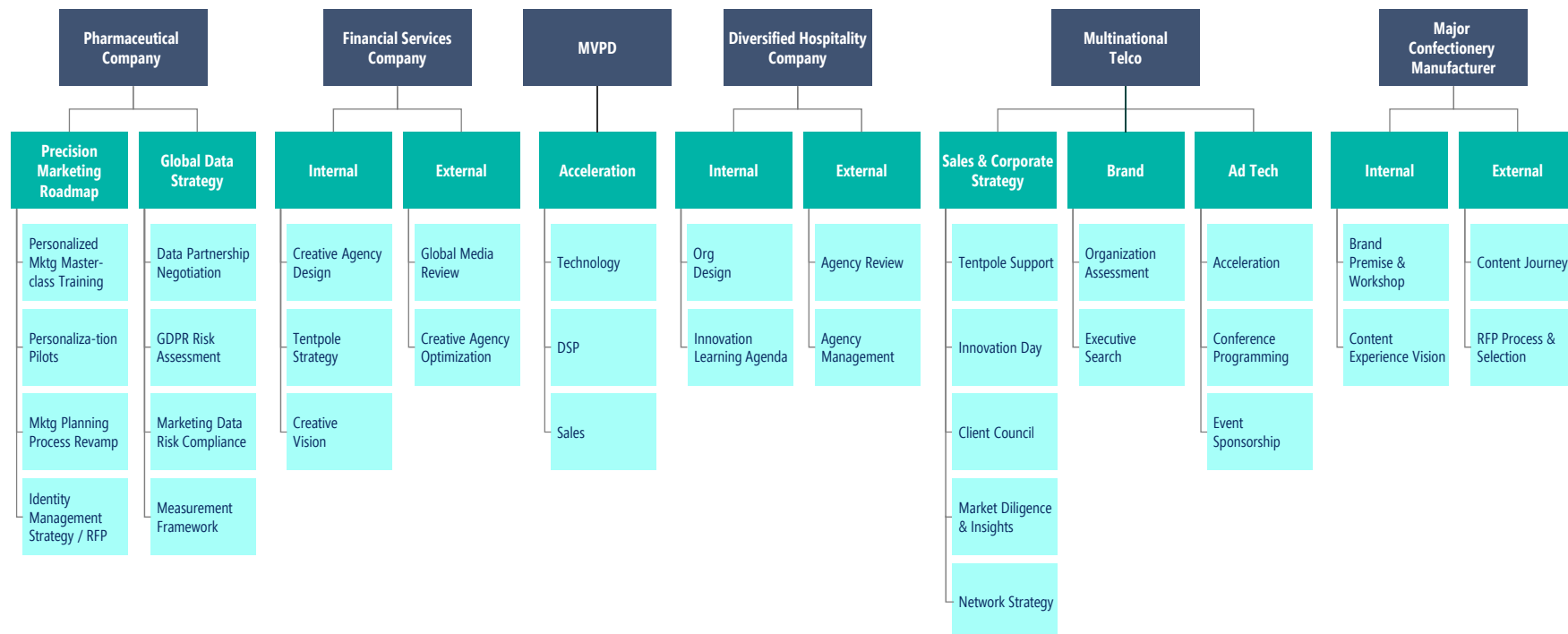
HIGH VALUE CLIENTS

SUSTAINING \$800K+ CLIENTS AND GROWING INTO NEW ONES



CLEAR PRODUCTS AND SERVICES

FORGING DEEPER PARTNERSHIPS WITH EXISTING CLIENTS



WHERE WE'VE SEEN & EXPECT TO SEE GROWTH

MULTIPLE LEVERS FOR GROWTH ACCELERATED BY ASCENTIAL



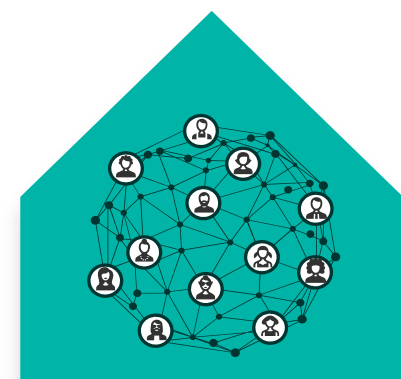
BRAND
ADVISORY



CLX



COLLABORATION



PRACTICE EXPANSION

MEDIALINK AT CANNES

WE DRIVE ATTENTION

MediaLink's influence in Cannes is unparalleled. Across the week, MediaLink will host over 2,000 senior industry executives in their space along with over 80 partners. There is no shortage of reasons to come, whether it be the nightly parties, daily top level programming sessions, meetings with innovative and influential marketing executives, or just to escape the heat. Senior attendees know that MediaLink beach will be a must stop in their weekly plans

THE VENUE

For the first time, MediaLink's venue space is a standalone activation on the Cannes Lions beach. With a larger footprint and a central location that neighbors both Palais', MediaLink's Beach will be a focal point of Cannes.

OUR EXPERIENCE

MediaLink has navigated this chaos for years. As a strategic partner in maneuvering this chaotic landscape, we customize game plans for partners that utilizes MediaLink's collective efficiencies at the industry's most important conference.



MEDIALINK 
BY ASCENTIAL

THANK YOU