

ebiquity

Data-driven insights

Capital Markets Day

November 8, 2016

Contents

1	About Us	Michael Karg
2	Media Measurement	Dietmar Kruse
3	Strategic Media Consultancy	Laetitia Zinetti
4	U.S. Media Transparency Project	Nick Manning
5	Multi-Channel Analytics	Bill Bruno
6	Marketing Effectiveness	Andrew Challier
7	Market Intelligence	Morag Blazey
8	Conclusion	Michael Karg



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About Us

Michael Karg, Group Chief Executive Officer

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We are a world-leading,
technology-enabled, independent consultancy,
specializing in marketing and media analytics

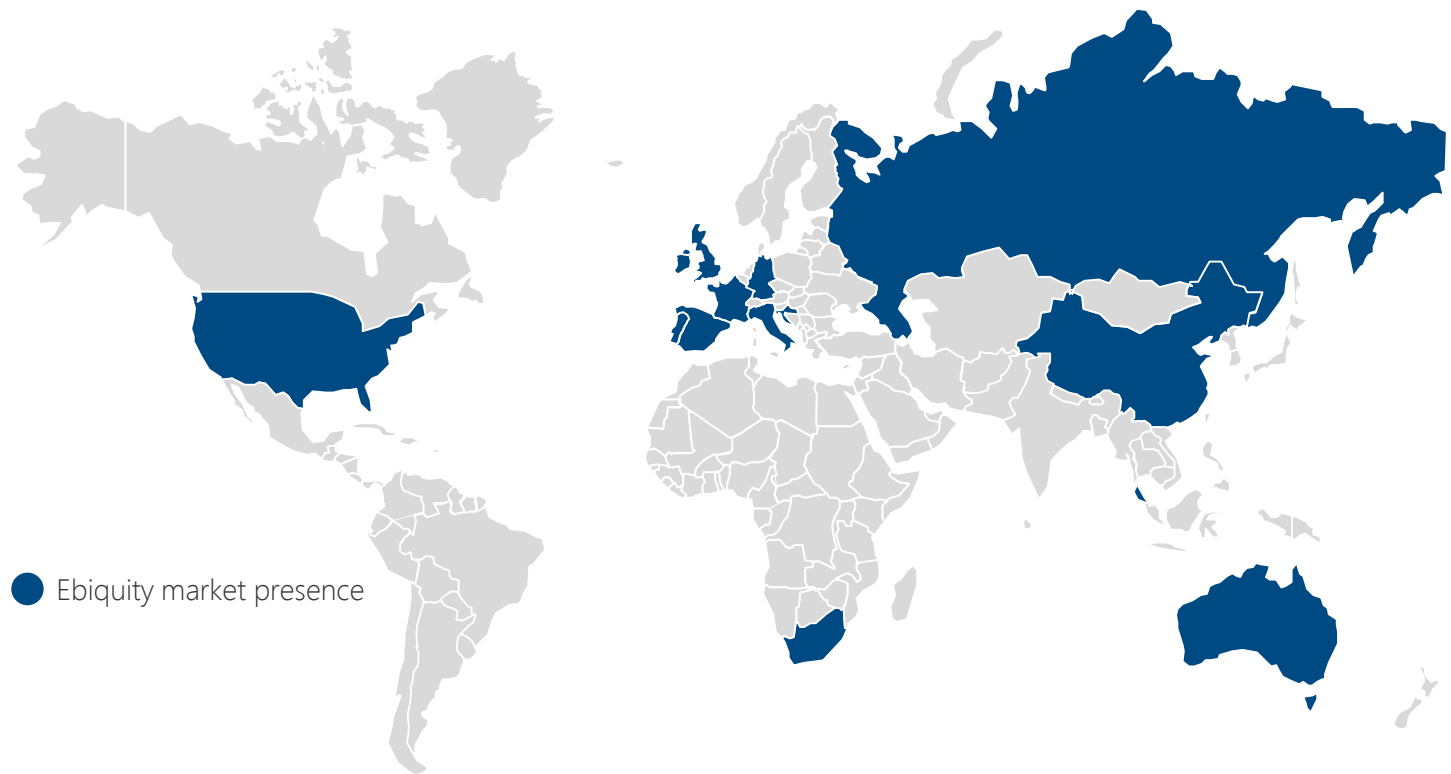
ABOUT US

In essence, we are

creating clarity for our clients

ABOUT US

Our teams work out of 18 offices in 13 markets



ABOUT US

Ebiquity's key differentiators are

Truly
independent

Deep subject-matter
expertise in Marketing
and Media

Entry into 80 of the
world's top 100
global advertisers

Global scale, local
expertise

ABOUT US

We support clients with three practice areas



**Media Value
Management (MVM)**



**Marketing Performance
Optimization (MPO)**



**Market
Intelligence (MI)**

ABOUT US

We are starting to benefit from a closer collaboration between our MVM and MPO practices

In 2016, over 50% of our incremental MPO revenues in the U.K. were generated from an existing MVM relationship

First, multi-discipline, multi-market pitch led to €800k revenues via a single contract

In the U.S., joint selling resulted in over \$1M incremental revenues this year



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Media Measurement

Dietmar Kruse, Managing Principal

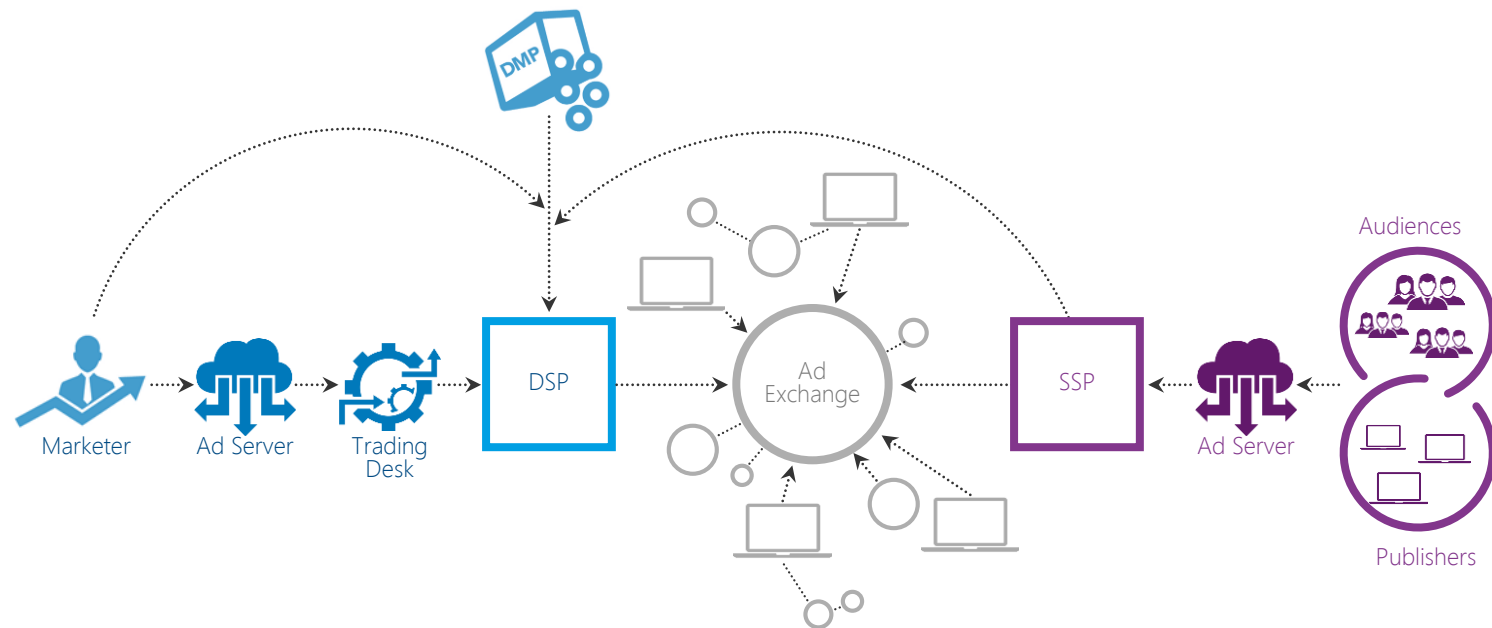
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MEDIA MEASUREMENT: PURPOSE

We help advertisers improve the performance of their paid media spend using proprietary techniques, data and tools

MEDIA MEASUREMENT: CONTEXT

With the emergence of digital, the media ecosystem has become increasingly complex

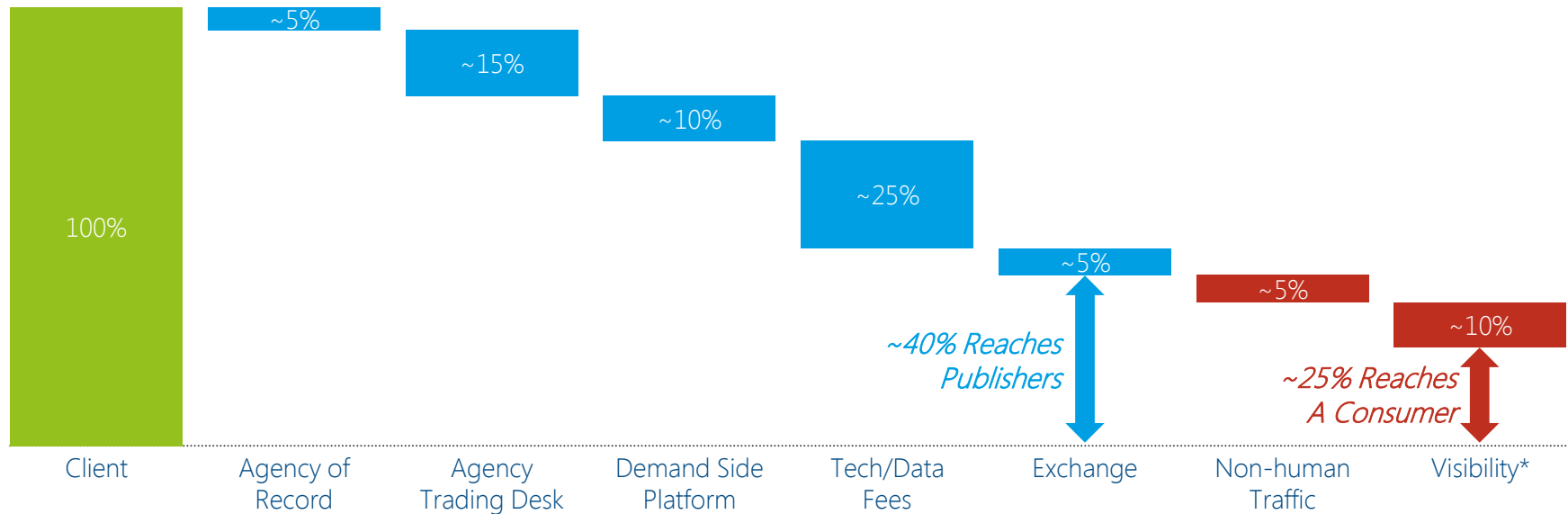


Programmatic Media Buying Value Chain

MEDIA MEASUREMENT: CONTEXT

We help our clients understand the media ecosystem and implications on value creation, e.g. programmatic

We have observed cases where only circa 25c of every 1\$ reach a real audience



MEDIA MEASUREMENT: OUR CORE SERVICES

We provide six distinct services either as standalone or in combination

Media
Benchmarking

Cost Savings/
Guarantee Tracking

Media Sponsorship
Evaluation

Digital Display
Optimization

Search
Optimization

Social Media
Performance Review

MEDIA MEASUREMENT: VALUE FOR CLIENTS

Our services are based around creating continuous improvement for our clients' media investments

Improved campaign performance – i.e. reach and frequency

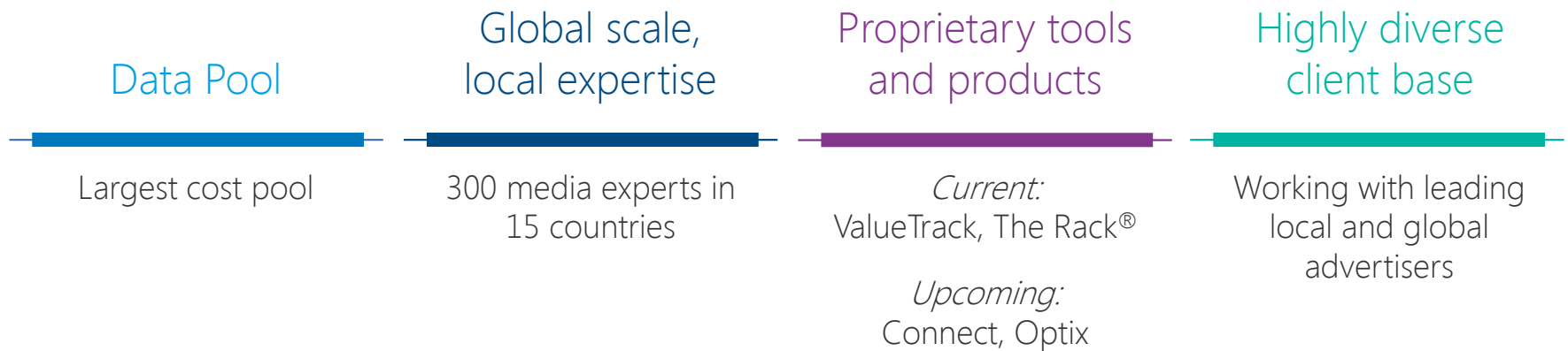
Constant results with lower media spend

Better communications performance via a more refined blend of media channels

Challenged status-quo in recognition that media is constantly evolving

MEDIA MEASUREMENT: OUR KEY DIFFERENTIATORS

We are the leader in media benchmarking

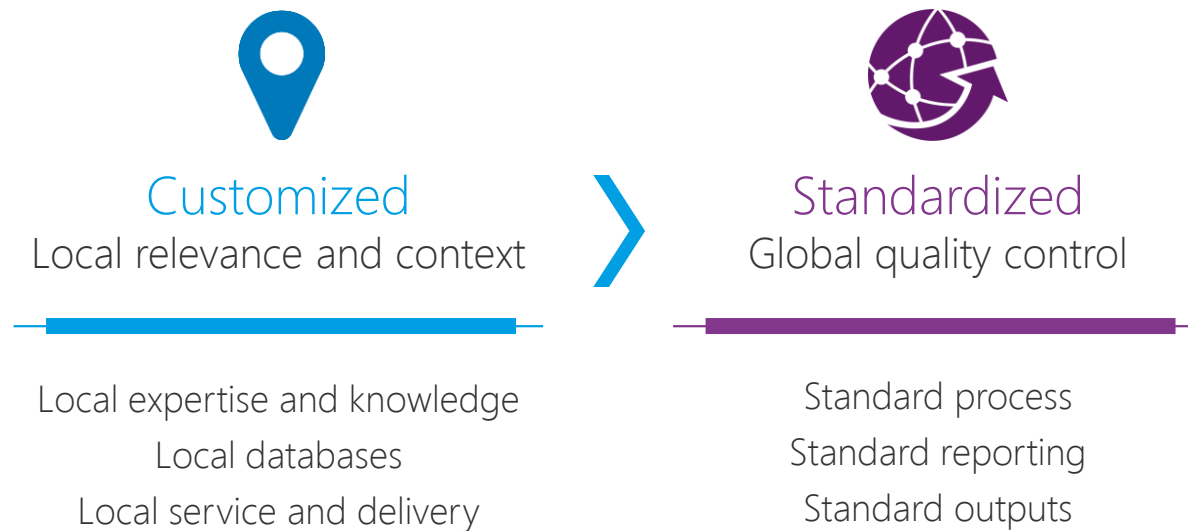


A close-up photograph of a dark blue car, focusing on the side mirror and door handle. The car's surface is highly reflective, showing clear highlights and reflections of the surrounding environment. The background is blurred, suggesting an outdoor setting with other vehicles and structures.

How to achieve paid media spend savings across 23 countries for an automotive manufacturer

MEDIA MEASUREMENT: AUTOMOTIVE CASE STUDY – OUR APPROACH

We verified the agency's cost savings claims via our network of experts and then consolidated results globally



MEDIA MEASUREMENT: AUTOMOTIVE CASE STUDY – BUSINESS OUTCOMES

Our analysis generated over £60M in value for our client in three years

~£25M



by delivering the media savings
promised in the spirit of the
agreement

~£35M



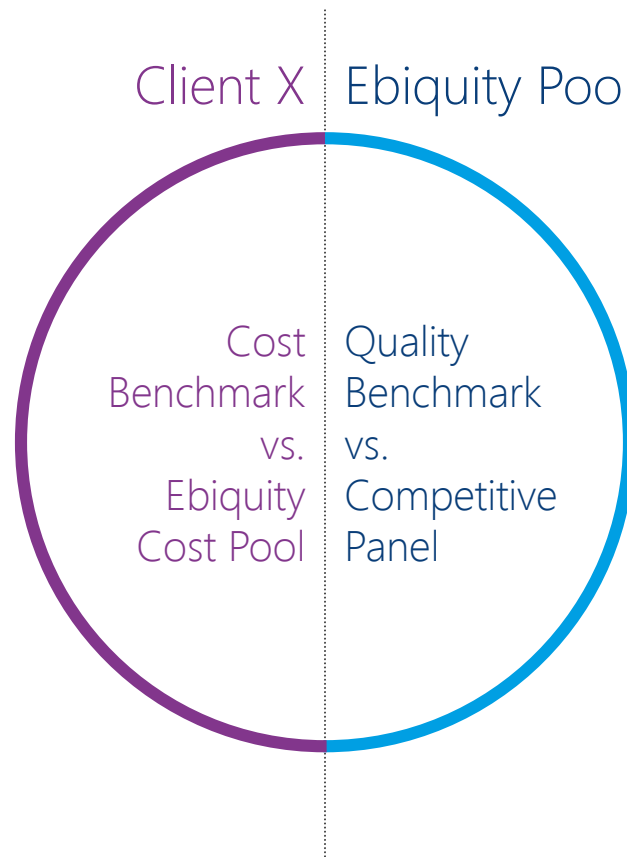
of value in cash refunds, additional
free space and/or other forms of
agency volume bonification



How to optimize digital paid media investments

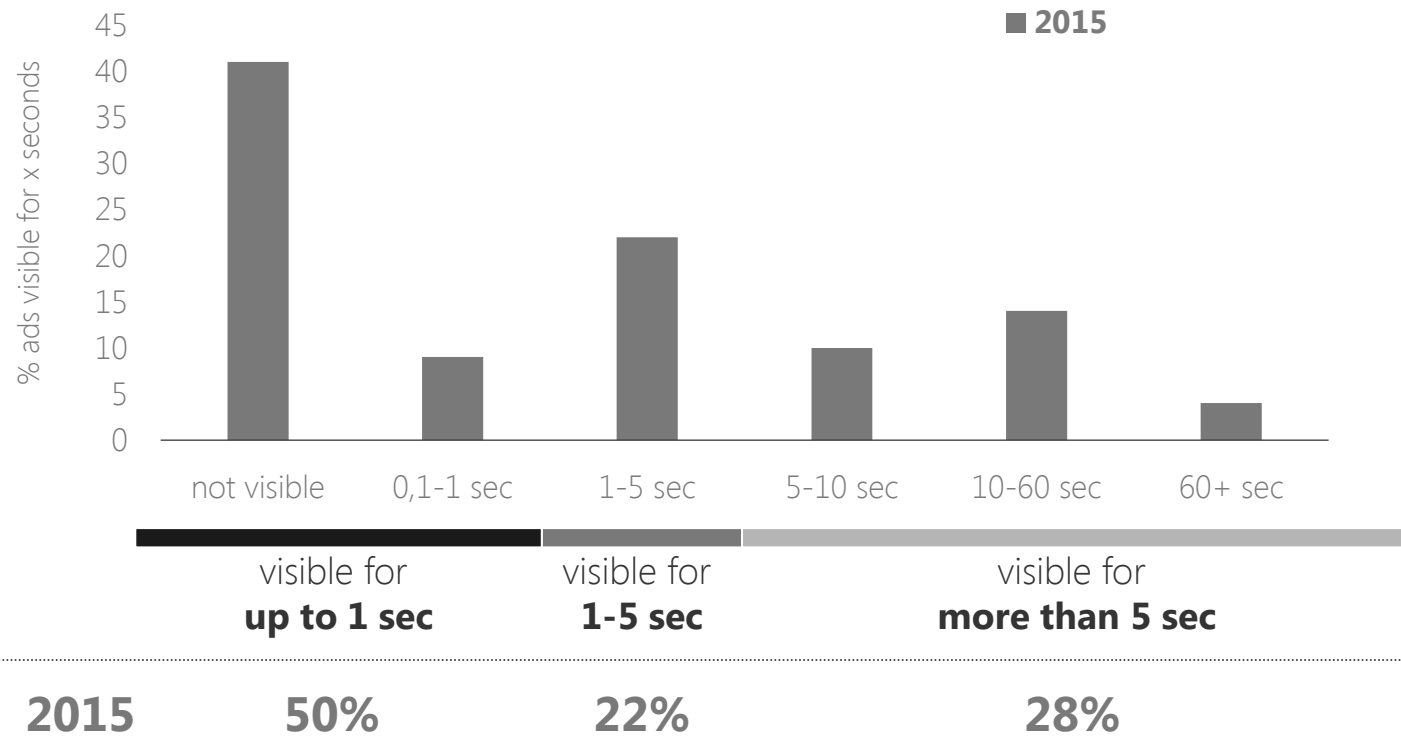
MEDIA MEASUREMENT: AUTOMOTIVE CASE STUDY – OUR APPROACH

We benchmarked the client's data against our pool of other advertisers on numerous cost and quality KPIs



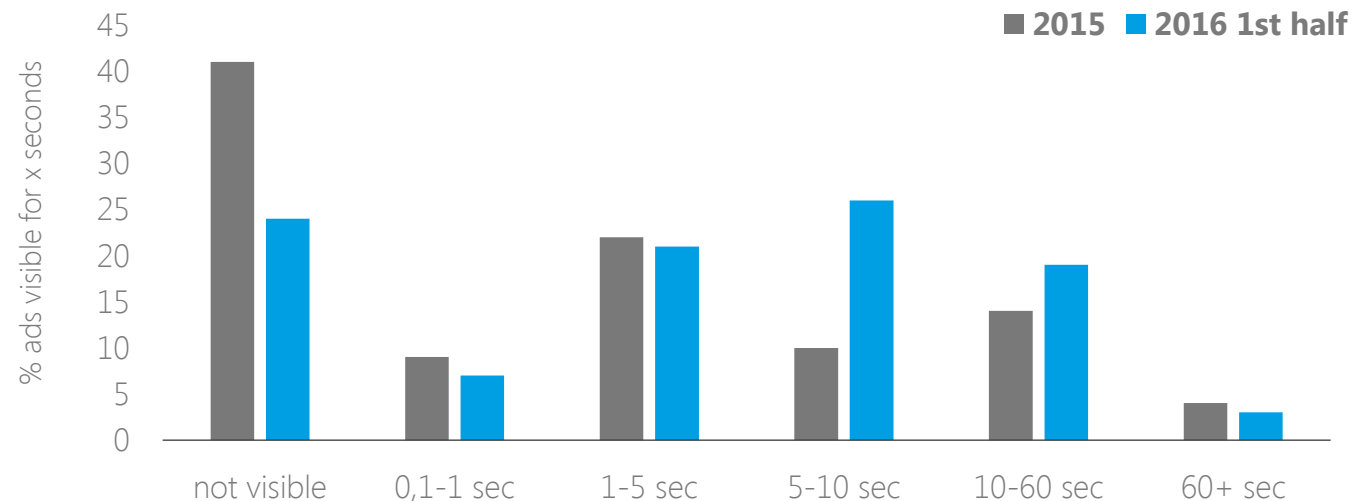
MEDIA MEASUREMENT: AUTOMOTIVE CASE STUDY – BUSINESS OUTCOME

In the process we identified low visibility of digital banner ads as the key issue



MEDIA MEASUREMENT: AUTOMOTIVE CASE STUDY – BUSINESS OUTCOME

We significantly improved visibility of banner ads which resulted in over £500k in additional media value



2015	50%	22%	28%	
1H 2016	31%	21%	48%	20% more ads being visible



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Strategic Media Consultancy

Laetitia Zinetti, Managing Principal

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STRATEGIC MEDIA CONSULTANCY: PURPOSE

We provide strategic advice to clients on how their businesses can take advantage of the rapidly changing media landscape

STRATEGIC MEDIA CONSULTANCY: OUR CORE SERVICES

We provide six distinct services to advertisers

Help select Appropriate
Media Partner

Design Media Operations
and Organization

Conduct Digital
Media Training

Inform the Choice of
Advertising Technology

Consult on Approaches
to Programmatic

Advise on the Use of
Customer Data

STRATEGIC MEDIA CONSULTANCY: VALUE FOR CLIENTS

We create clarity in a complex environment

Gain control of the end-to-end advertising process

Take well informed investment decisions

Ensure data is used towards driving more effective communications

Establish knowledge of which media investments deliver real business outcomes

STRATEGIC MEDIA CONSULTANCY: OUR KEY DIFFERENTIATORS

We are uniquely positioned in a rapidly emerging market

Truly
independent

Unique and holistic
view of advertising
investments globally

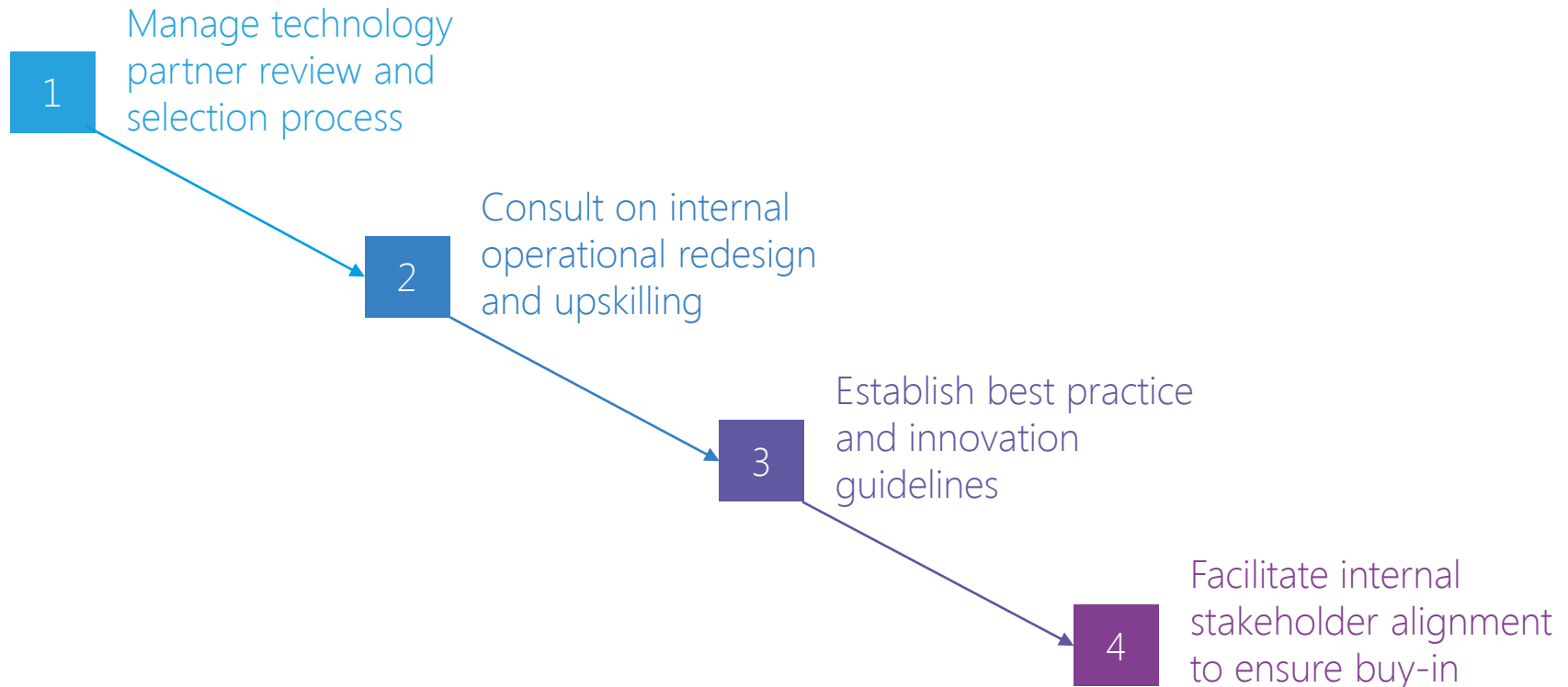
Consultants from all
areas of the media
ecosystem



How to simplify the
advertising technology partner landscape
and drive innovation

STRATEGIC MEDIA CONSULTANCY: TELCO CASE STUDY – APPROACH

We deployed a four step process to drive organizational change and gain internal buy-in



STRATEGIC MEDIA CONSULTANCY: TELCO CASE STUDY – BUSINESS OUTCOMES

Over the last three months we identified significant gains for the client organization



Reduced the number of partners to create significant savings



Improved the processes with internal and external partners



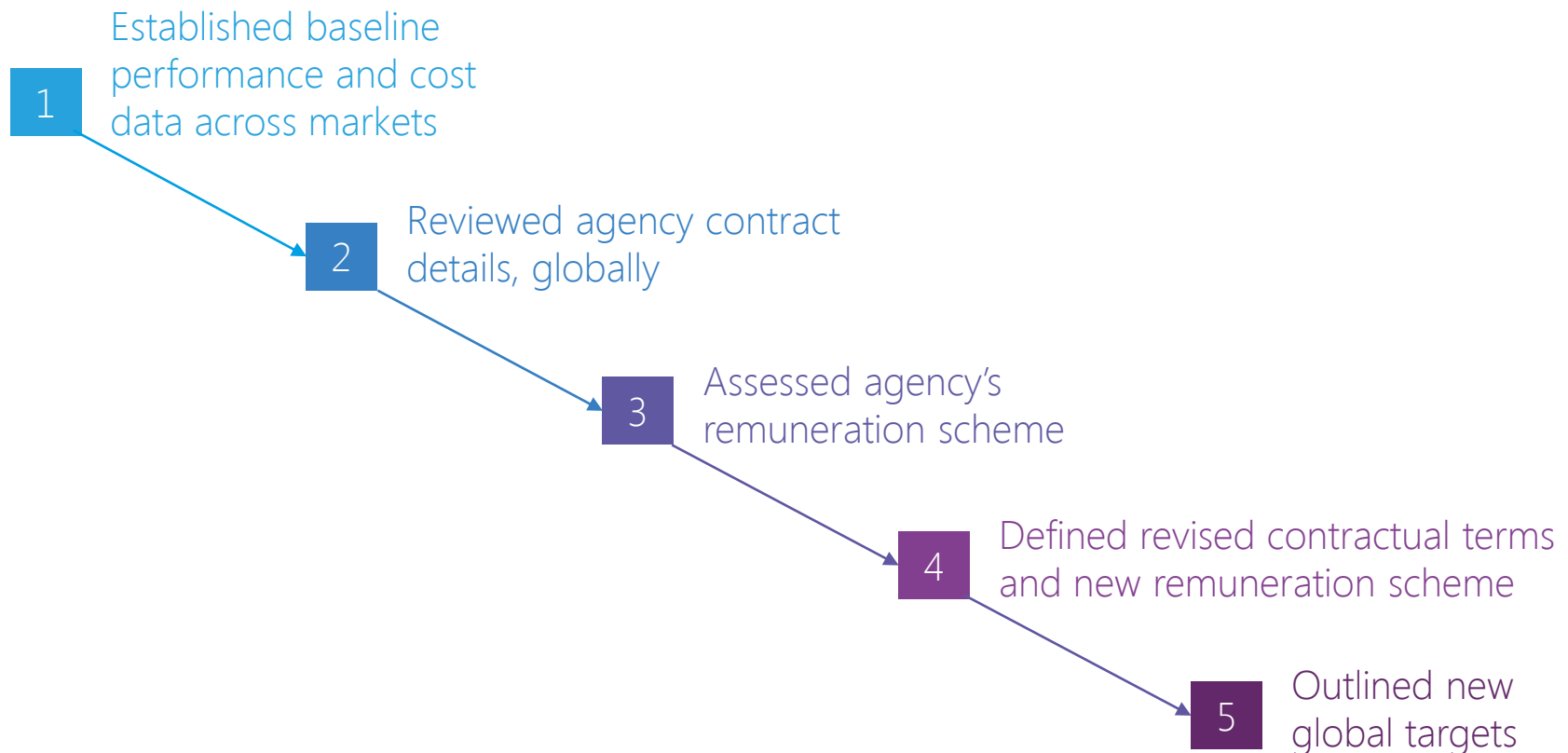
Created a standardized approach by identifying innovative practices



How to design a global agency remuneration model for paid search

STRATEGIC MEDIA CONSULTANCY: LUXURY GOODS CASE STUDY – APPROACH

We conducted an assessment of the agency engagement model for paid search across 58 markets



STRATEGIC MEDIA CONSULTANCY: LUXURY GOODS CASE STUDY – BUSINESS OUTCOMES

Our analysis led to significant improvements



€1M in savings due to optimized agency fees



Contractual and remuneration best practice guidelines



Unified reporting framework across brands and countries



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The U.S. Media Transparency Project: Implications and Outcomes to date

Nick Manning, Chief Strategy Officer

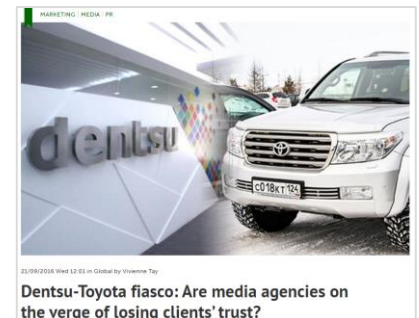
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THE U.S. MEDIA TRANSPARENCY PROJECT

Media transparency is vital for advertisers

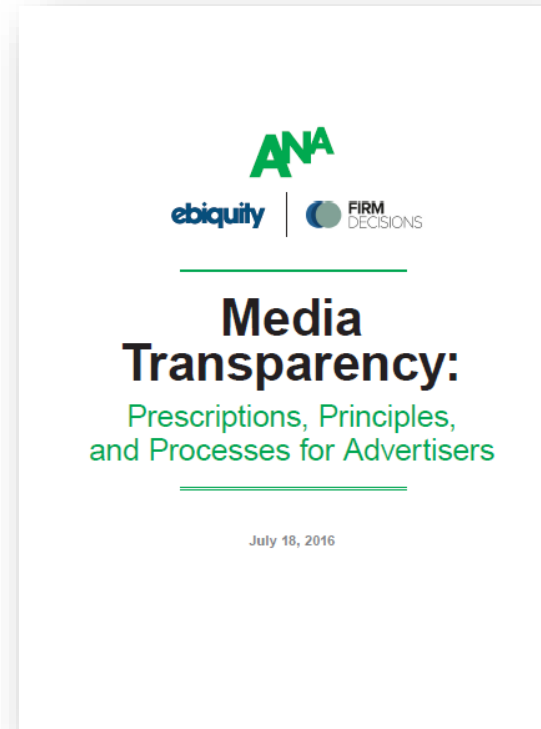
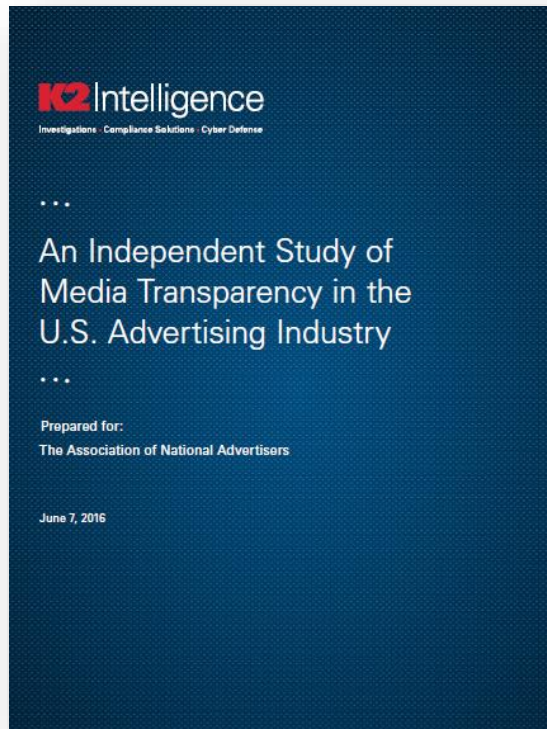
Brands require 'real' transparency of data ownership and money flows to be able to judge the effectiveness of their advertising

Currently the market is opaque, and advertisers are increasingly demanding change



THE U.S. MEDIA TRANSPARENCY PROJECT

The K2 report shed light on current U.S. media trading practices — we provided an actionable roadmap



THE U.S. MEDIA TRANSPARENCY PROJECT

Clients are beginning to take transparency more seriously

Issues in media transparency are now increasingly recognized by advertisers

Our recommendations are being widely discussed globally

The need for stronger media governance by advertisers is becoming a topic of focus

The importance of independent scrutiny is being more firmly established

Ebiquity/FirmDecisions are now regarded as industry leaders on this topic

THE U.S. MEDIA TRANSPARENCY PROJECT

Advertisers are starting to adopt our recommendations

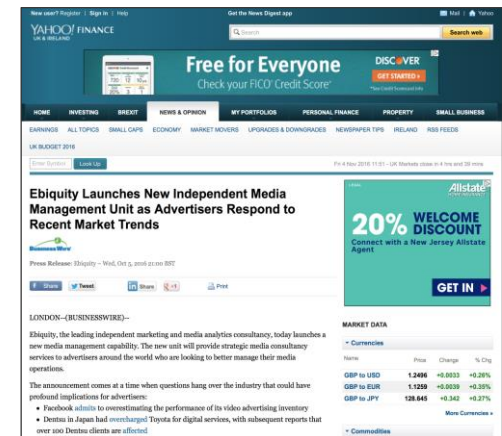
Significant uplift in
interest from
advertisers

ANA initiative now
being directly quoted*

We are well-positioned
to help advertisers



Explain your company's philosophy, value proposition and strategic approach to media audits, particularly in light of the current state of the industry response to the ANA Media Transparency reports. What distinguishes you from your competitors and makes you unique?





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Multi-Channel Analytics

Bill Bruno, CEO North America

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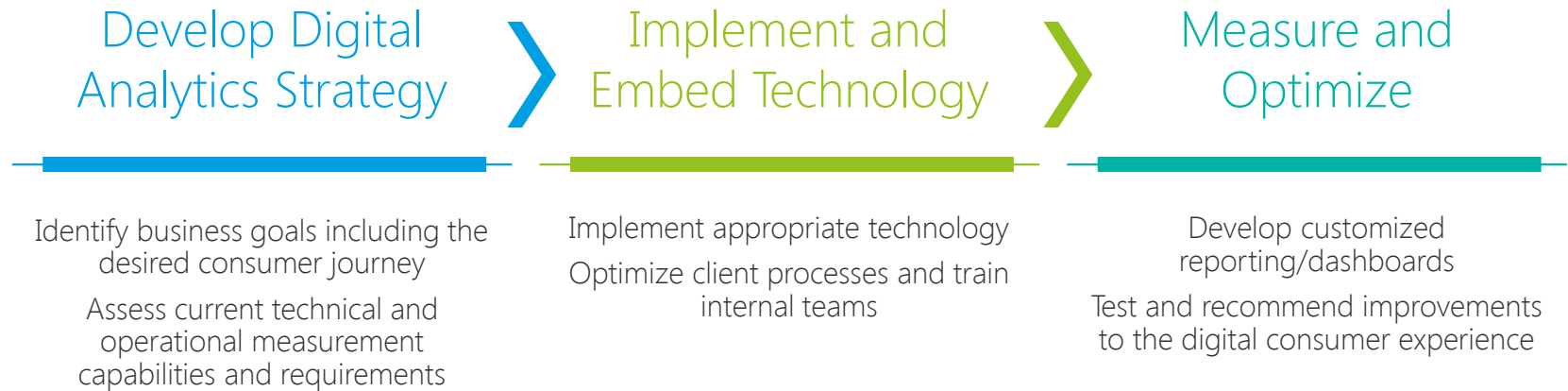
MULTI-CHANNEL ANALYTICS: PURPOSE

We help clients with the planning, technical implementation, measurement, analysis and reporting of data to understand and optimize consumer journeys across multiple digital channels



MULTI-CHANNEL ANALYTICS: OUR CORE SERVICES

We follow a three-stage process





MULTI-CHANNEL ANALYTICS: VALUE FOR CLIENTS

The value we generate for our clients is comprehensive

Optimized digital consumer experience

Deeper knowledge about consumer behaviour

Continuous improvements due to ongoing test & learn approach

Maximized return on digital marketing technology investments

Drive revenues and / or savings (e.g. higher digital conversion rates)



MULTI-CHANNEL ANALYTICS: OUR KEY DIFFERENTIATORS

Our widely recognized subject matter expertise and digital technology coverage give us significant credibility

Truly Independent

Vendor and agency neutral

Extensive Partner Network

Over 100 technology
and data partners

Coverage Across Digital Channels

Active projects across web,
mobile, tablet, kiosks, call
centres, etc.

Deep Subject Matter Expertise

Our experienced
practitioners are highly
recognized experts

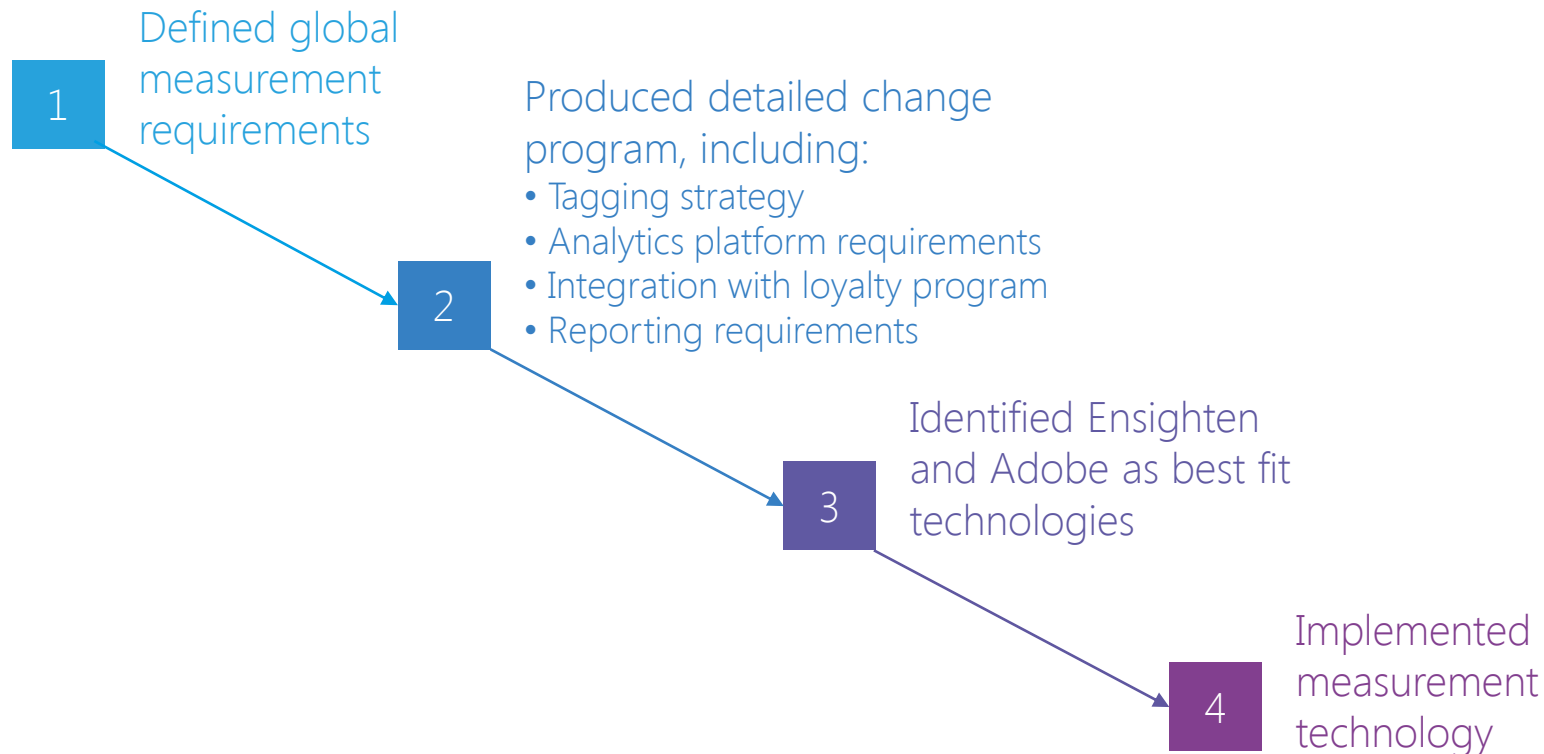


How to step-change digital marketing analytics for a hotel group with over 4,000 properties across 100 countries



MULTI-CHANNEL ANALYTICS: HOSPITALITY CASE STUDY – OUR APPROACH

We created a four-step structured approach





MULTI-CHANNEL ANALYTICS: HOSPITALITY CASE STUDY – BUSINESS OUTCOME

This led to rapid insights and tangible business benefits

Quick
implementation

2
months

Savings in tracking
technology

\$800,000
per year

Improved
decision-making

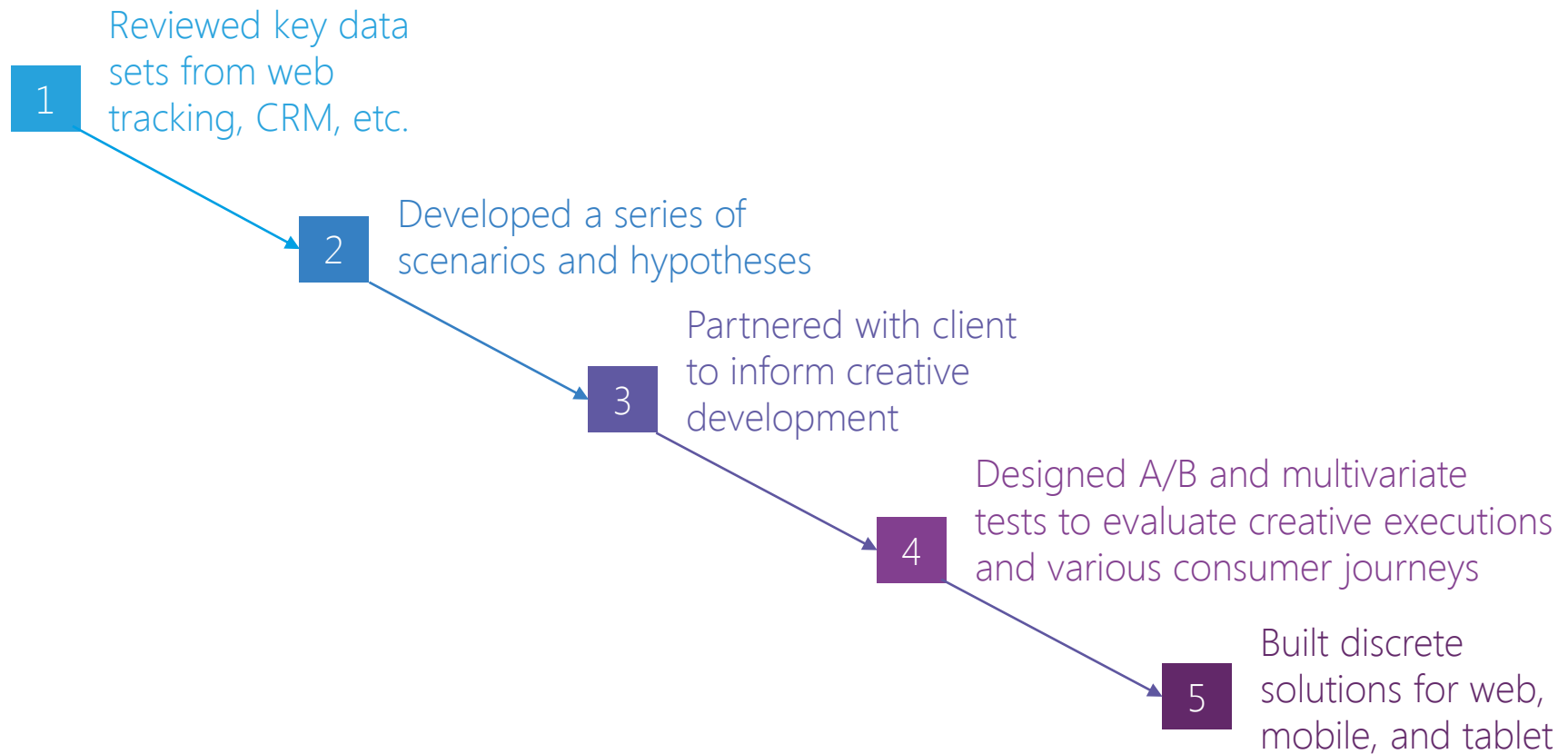
+15-30%
ROI per year



How to increase engagement on and use of digital properties for a leading financial services provider

MULTI-CHANNEL ANALYTICS: FINANCIAL SERVICES CASE STUDY – OUR APPROACH

We partnered with diverse stakeholders to design tailored solutions for multiple digital channels





MULTI-CHANNEL ANALYTICS: FINANCIAL SERVICES CASE STUDY – BUSINESS OUTCOME

This drove both higher interaction and engagement

Increase in 'key actions'
across digital channels

+30%

Customer satisfaction

+25%



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Marketing Effectiveness

Andrew Challier, Chief Client Officer

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MARKETING EFFECTIVENESS: PURPOSE

We conduct statistical analysis of sales and marketing data to estimate its impact on business performance, in order to forecast the impact of future investments and activity



MARKETING EFFECTIVENESS: OUR CORE SERVICES

Our three core service offerings are supported by a set of customized tools

Attribution Modelling

Which factors (e.g., paid media, weather) drive business outcomes and in what proportions?

Tool: Testmatch

Marketing Mix Optimization

What mix of marketing levers (e.g., price, TV ads, etc.) delivers the best impact?

Budgeting and Forecasting

What is the optimal marketing budget for any given business goal, and what will be the likely results?

Tool: PlanIT



MARKETING EFFECTIVENESS: VALUE FOR CLIENTS

Our work delivers financial and planning benefits

Revenue growth and/or increased profitability

Better-informed business cases for marketing and media investments

Data-driven insights beyond paid media and marketing challenges

More reliable and accurate forecasting

MARKETING EFFECTIVENESS: OUR DIFFERENTIATORS

We differentiate ourselves in a number of ways against our competitors

Competitors

Ebiquity difference

Consultancies



Subject-matter experts in media and marketing

Media Agencies



Impartial and objective

Technology pure plays



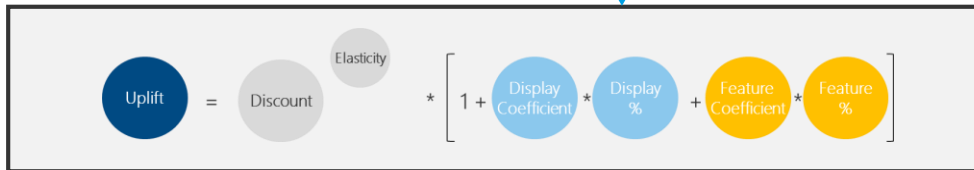
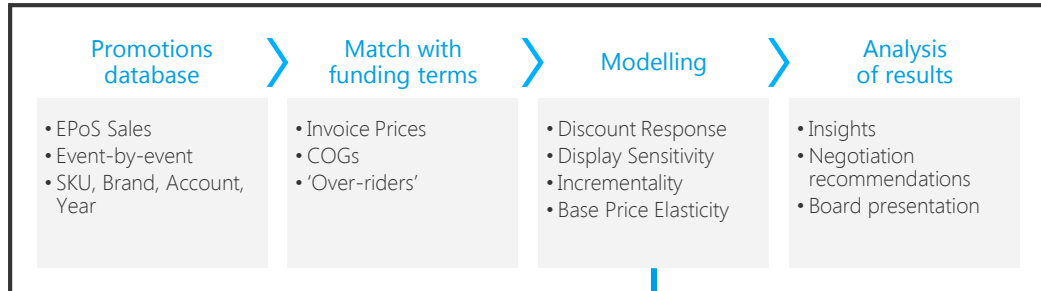
Client, not technology first
No 'Black Box'
Actionable insights, not just data



How to optimize the annual investment of £60M in
supermarket price promotions

MARKETING EFFECTIVENESS: FMCG CASE STUDY – APPROACH

Our approach involved a structured analytic process which fed into our proprietary PlanIT software tool

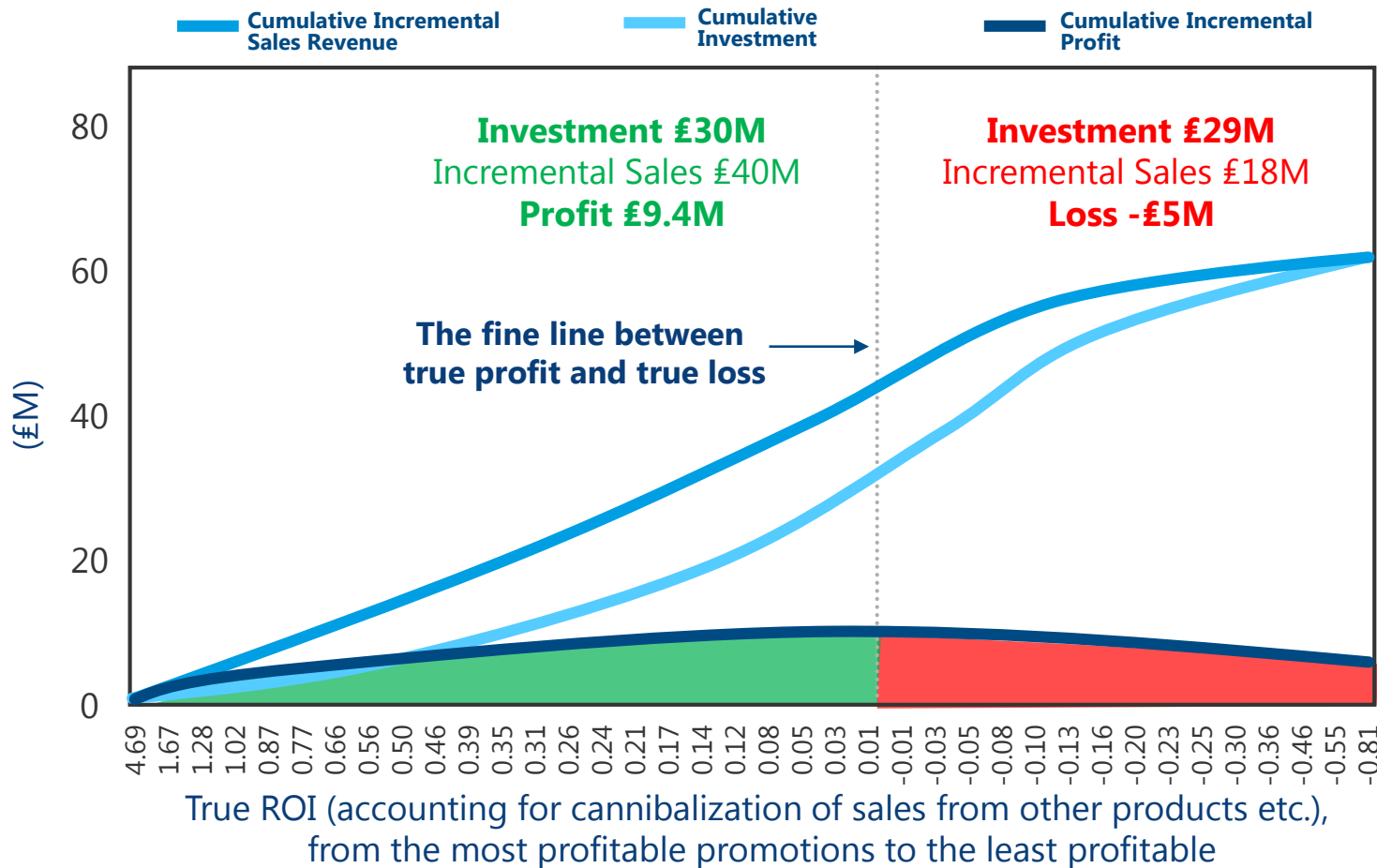


Embed Ebiquity PlanIT—our financial planning tool for FMCG trade promotions



MARKETING EFFECTIVENESS: FMCG CASE STUDY – BUSINESS OUTCOMES

We identified a £5M recurring profit opportunity and embedded PlanIT into the client's planning cycle

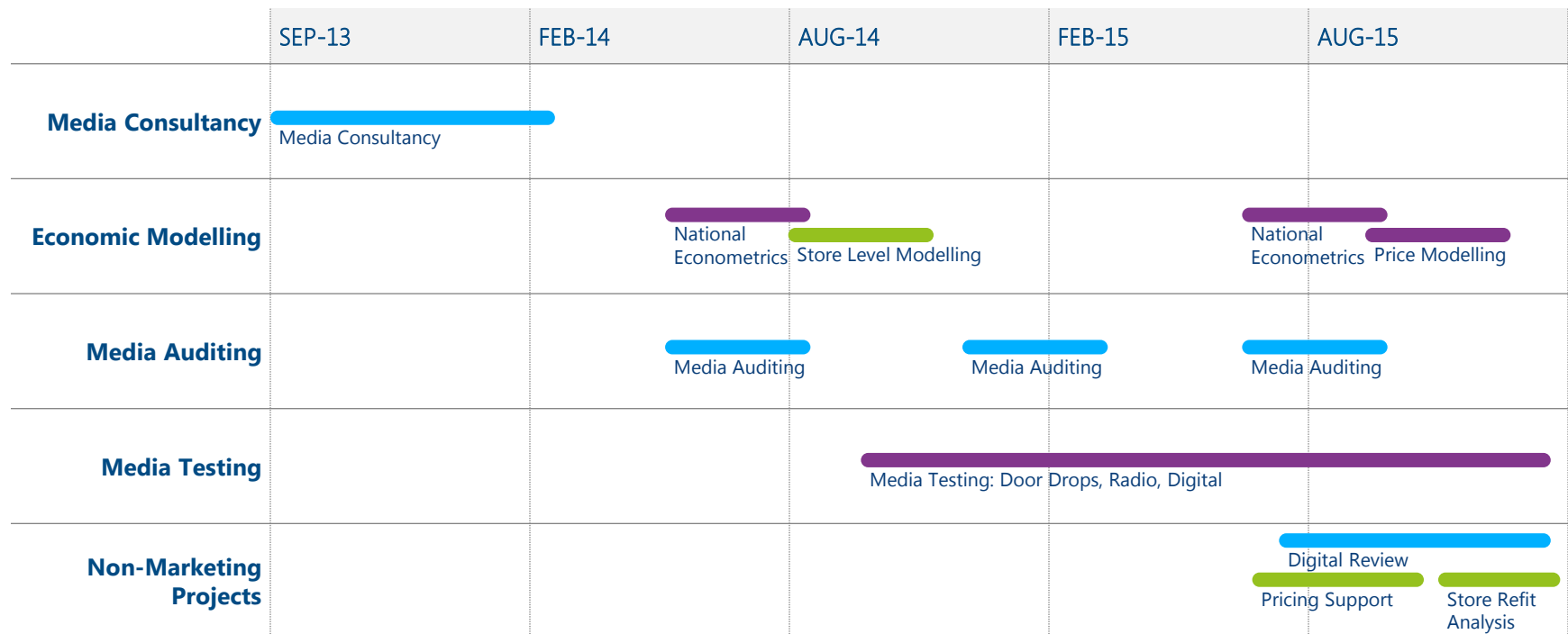


A young woman with long brown hair, wearing a white lace-trimmed tank top, is smiling and looking at a red bottle she is holding in her right hand. In her left hand, she holds a white bottle. She is standing in a pharmacy or grocery store, with shelves of various products visible in the background. A semi-transparent white banner is overlaid across the middle of the image, containing the text "How to build the business case for marketing".

How to build the business case for marketing

MARKETING EFFECTIVENESS: RETAIL CASE STUDY – EVOLUTION OF OUR RELATIONSHIP

This has generated an ongoing relationship comprising a number of different services



- Media Value Management
- Non media related Marketing Effectiveness
- Marketing Effectiveness

MARKETING EFFECTIVENESS: RETAIL CASE STUDIES – APPROACH

This has resulted in four ongoing work-streams

Attribution Modelling

What is the
contribution of
marketing to sales?

Store-level Analytics

What is the impact of
changes to in-store
layout and space?

SKU-level Analytics

What is the impact of
price promotion
strategies on sales?

Digital Analytics

Are we tracking and
measuring the right
things in digital?



MARKETING EFFECTIVENESS: CASE STUDY – BUSINESS OUTCOMES

We delivered strong financial returns for the client

Attribution
Modelling

Marketing ROI
versus target

+50%

Store-level
Analytics

Optimizing layout in
'trial' stores

+£17m

SKU-level
Analytics

Annual profit
potential on just one
product

+£350k

Digital
Analytics

Efficiency gains in the
first six months

+£1m



Questions



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Market Intelligence

Morag Blazey, Managing Principal

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MARKET INTELLIGENCE: PURPOSE

We provide advertisers with a picture of their own and their competitors' creative executions, spend and media strategies and an understanding of how these resonate

MARKET INTELLIGENCE: OUR CORE SERVICES

We go to market with four services supported by a set of proprietary products

Advertising and Media Monitoring

Coverage of over 90 countries

Insight Reporting

Analysis of paid, owned and earned media

Primary Research

Bespoke stakeholder, opinion leader and consumer research

Social Media Monitoring and Analysis

Coverage of 187 languages

Products

Portfolio: UK, International, Media, Digital ePublisher

Sonar*

*In partnership with TalkWalker

MARKET INTELLIGENCE: VALUE FOR CLIENTS

This delivers visibility of competitor activity, consumer opinions and actionable insight

Insight into the complex, global, disparate, advertising market

Understanding of competitive communications strategies and budgets

Clarity on compliance with brand guidelines

Visibility of competitor in-market pricing

Impartial view on consumer resonance of competitor activity

MARKET INTELLIGENCE: OUR KEY DIFFERENTIATORS

We provide advertising intelligence on an intuitive, integrated platform



A single view of
media spend
and creative
executions



Unique access
to competitors'
pricing
strategies



Best-in-class
brand
compliance
monitoring



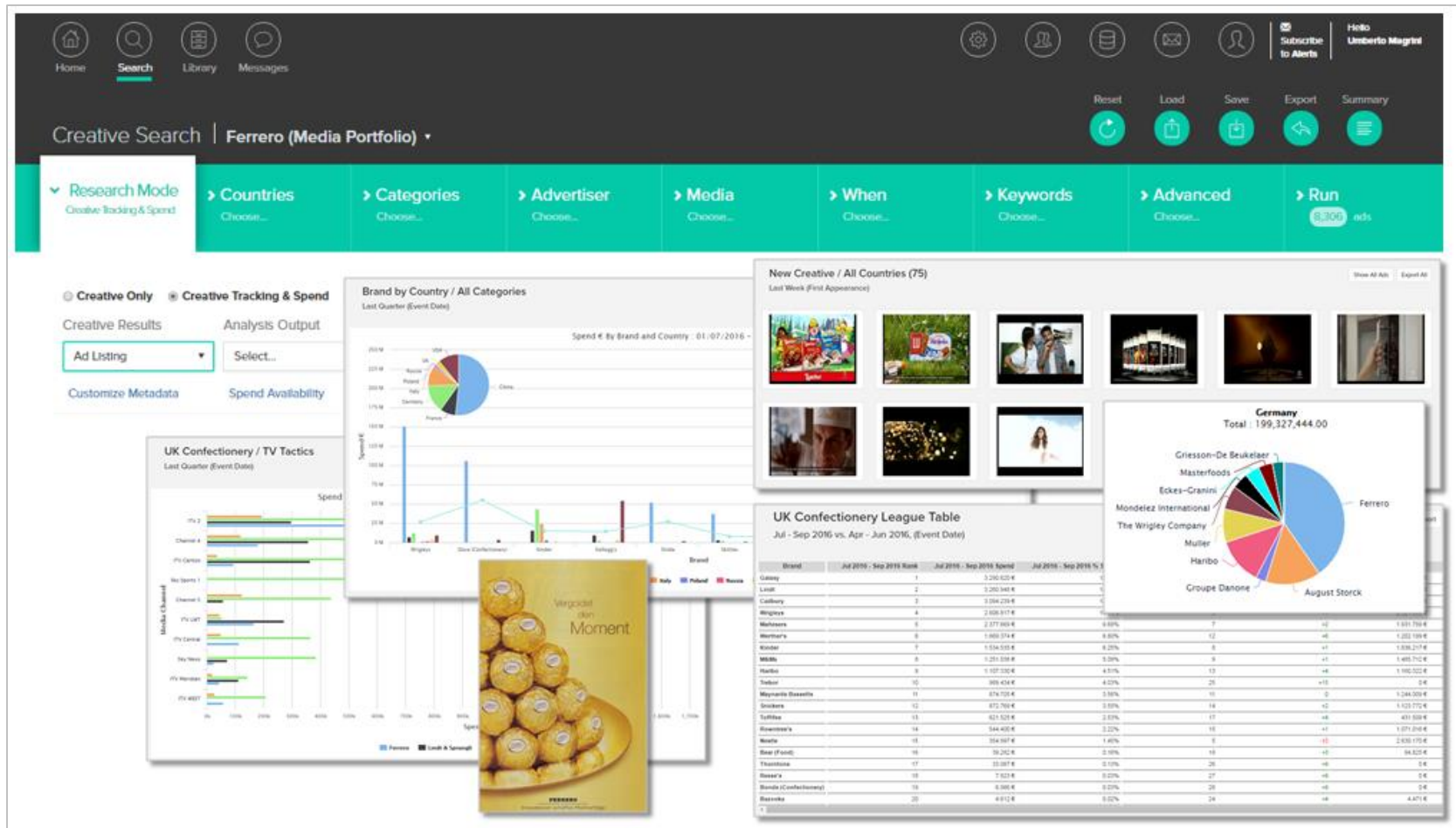
Unique digital
capture and
spend
methodology



Paid, owned,
earned and
shared comms
reporting

MARKET INTELLIGENCE: PRODUCT DEMONSTRATION

Portfolio Media





Questions



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Conclusion

Michael Karg, Group Chief Executive Officer

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CONCLUSION

We will focus on five areas

Organic expansion of our MPO service offering

Deepening and expanding the relationship with our key clients

Development of our digital services

Further productization of our existing tools and methodologies

Creating an organization to support growth

CONCLUSION

Ebiquity's key differentiators are

Truly
independent

Deep subject-matter
expertise in Marketing
and Media

Entry into 80 of the
world's top 100
global advertisers

Global scale, local
expertise

CONCLUSION

'The process is clear, the team is very committed and the final learnings are amazing. I would definitely recommend working with Ebiquity.'

European Regional Marketing Director, Leading Global Consumer Product Company