



ASCENTIAL
Products Deep Dive
Cannes, June 20th-21st 2018

INTRODUCTION



STRATEGIC GOALS & FINANCIAL OBJECTIVES

To be the #1 global, specialist information company....
enabling customers in the consumer value chain....
to win in the digital economy....
by excelling at product design, marketing and sales







Accelerate the organic growth of our
revenues....
while optimising margins and profits



Maximise value creation through the
application of a tightly focussed
capital allocation process

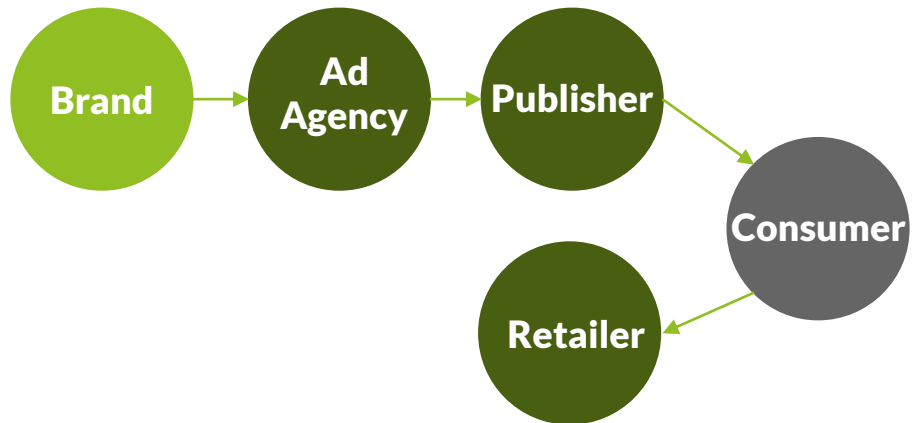
THE CONSUMER VALUE CHAIN: A BROAD AND ATTRACTIVE MARKET TO SERVE

Generation 1	Generation 2	Generation 3	Generation 4
		<p>Marketplaces</p>  <p>Digital Intermediaries</p> 	<p>Digitization of physical commerce and O2O becoming managed and integrated</p>
<p>Key characteristics</p>	<p>Key characteristics</p>	<p>Key characteristics</p>	<p>Key characteristics</p>
<ul style="list-style-type: none"> • Local, independent, fragmented • Limited distribution and catalogue based • Wholesaler controlled • Largely manual / mechanical 	<ul style="list-style-type: none"> • Mass marketed, major store based chains • Scale based economics: Power SKUs, national brands • Early non direct call centre sales and introduction of online sales • Global / national supply chains 	<ul style="list-style-type: none"> • Marketplace & intermediary driven digital retail • High transparency but largely still single channel • Social & borderless commerce • Algorithmically driven with minimal human intervention 	<ul style="list-style-type: none"> • Marketplaces provide enterprise infrastructure as a service • Consolidation & integration of marketplaces & intermediaries into scale platforms • Offline-to-Online (O2O) propositions
<p>Key Supplier / Retailer Challenge</p>	<p>Key Supplier / Retailer Challenge</p>	<p>Key Supplier / Retailer Challenge</p>	<p>Key Supplier / Retailer Challenge</p>
<ul style="list-style-type: none"> • Distribution / access to products 	<ul style="list-style-type: none"> • Scale / trade terms 	<ul style="list-style-type: none"> • Managing price & quality transparency & the infinite shelf 	<ul style="list-style-type: none"> • Developing integrated online & offline experiences

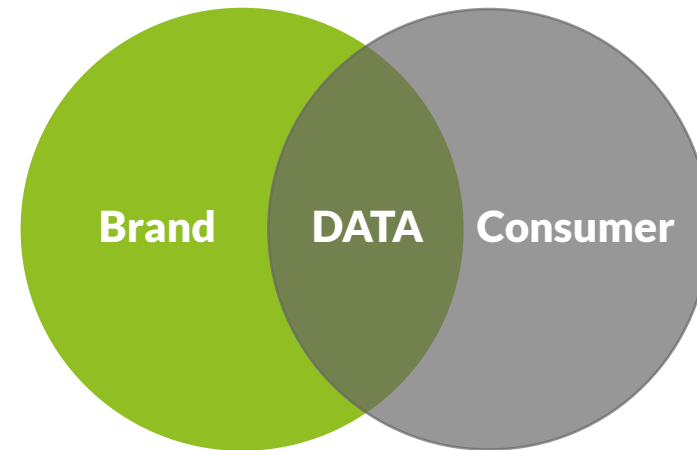
Source: Adapted from Planet Retail RNG 2017: Evolution of consumer product distribution

TRADITIONAL PLAYERS DISINTERMEDIATED - INFORMATION AND INSIGHT ON THE DIGITAL ECONOMY IS NOW CRITICAL

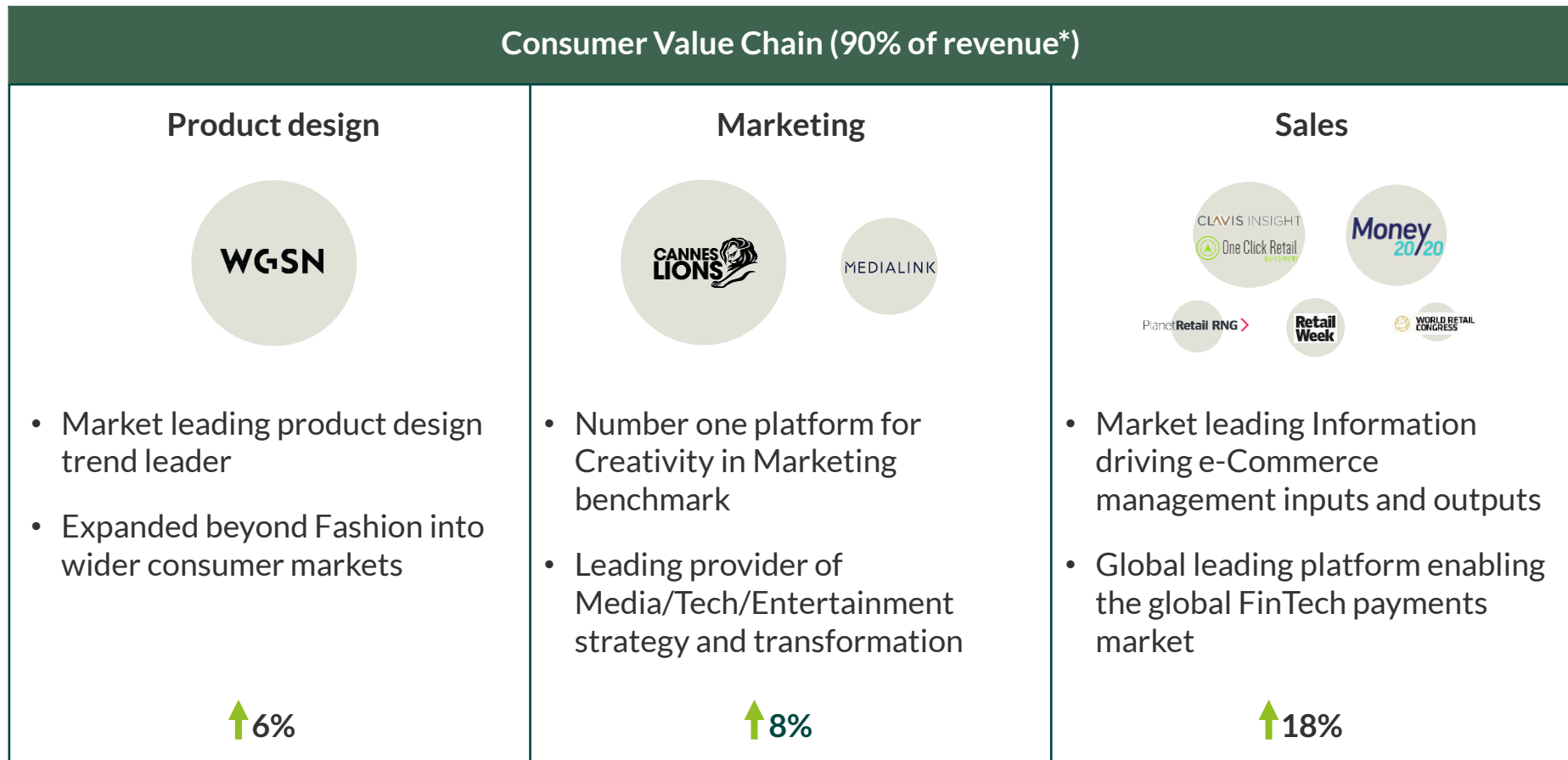
Indirect Brand Economy, 1879 - 2010



Direct Brand Economy Shift, 2011



OUR BRANDS SERVE THE NEEDS OF CUSTOMERS IN PRODUCT DESIGN, MARKETING AND SALES



Bubble size, proportion and growth figures all relate to 2017 revenue proforma for MediaLink and Clavis.
 *Excludes Exhibitions



AGENDA

1

Trends Driving Demand for Our Products

2

Our Products Today

3

The Vision

4

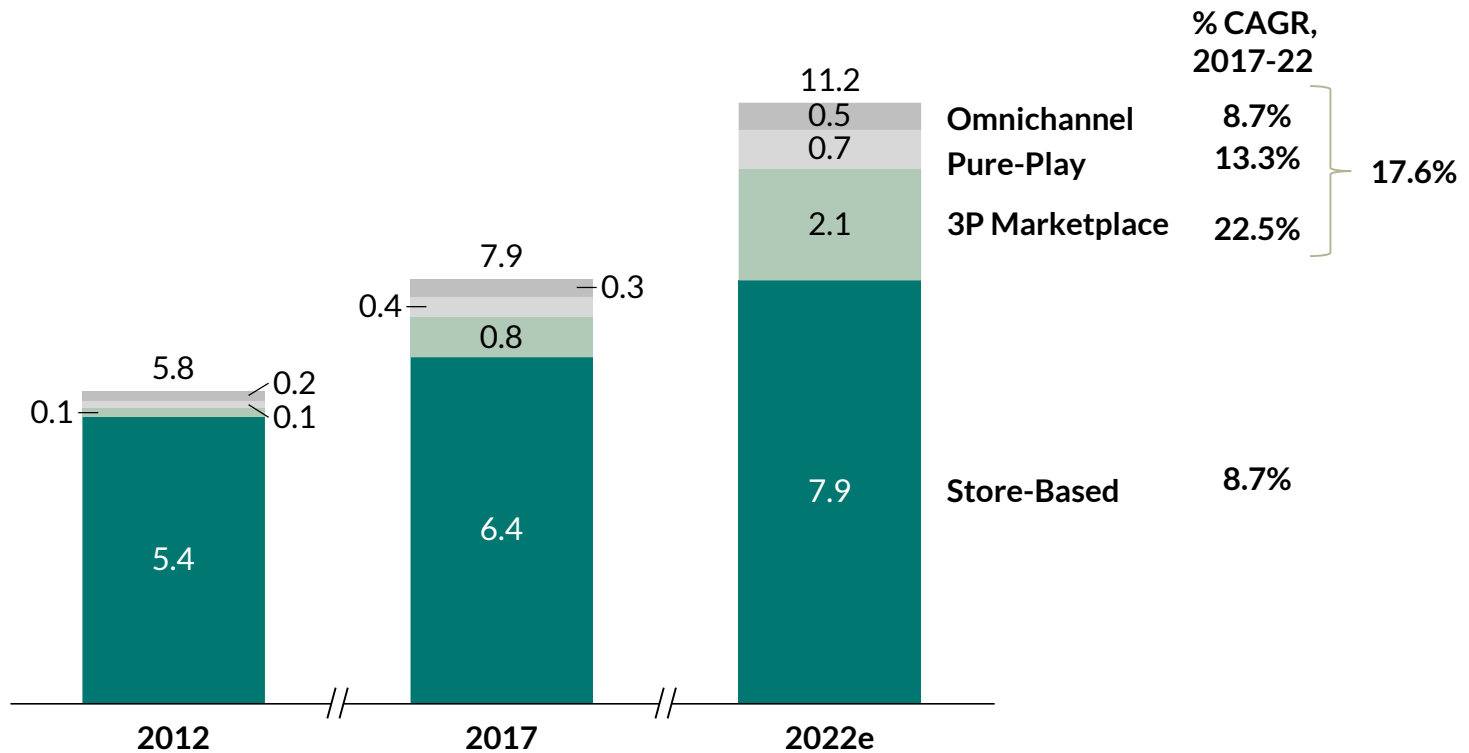
eCommerce Growth Platform in Development

5

Q&A

E-commerce is growing rapidly and taking share, but store based chain retail sales is still expected to grow globally

Global Chain Retail Sales, \$tn



Source: Planet Retail RNG

The growth of e-commerce is impacting the nature of the Store...

Stores historically combined Range, Price & Proximity to create propositions...

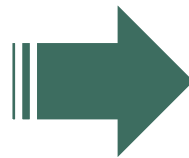
'Stores of the Future' combine new elements:

Experiential

Social

Frictionless

Curated



Amazon Go



Alibaba Hema Market



JD.com Unmanned C-store



Media Markt VR Store

Source: Planet Retail RNG

...and fundamentally altering the global retail landscape

Rank	2012 Sales (USD bn)		2017 Sales (USD bn)		2022e Sales (USD bn)	
1	Walmart:	\$431	=	Walmart:	\$497	↑ Alibaba Group: \$697
2	Carrefour:	\$101	↑	Alibaba Group:	\$342	↓ Walmart: \$602
3	Kroger:	\$96	↑	Amazon:	\$237	= Amazon: \$458
4	Seven & I Holdings:	\$93	↑	JD.com:	\$143	= JD.com: \$412
5	Costco:	\$91	↓	Carrefour:	\$124	= Carrefour: \$160
Top 5 Share	14%		17%		21%	

Predominantly store-based retailer
 Predominantly ecommerce-based retailer

Source: Planet Retail RNG (Sales = GMV; Top 5 Share of Chain Retail Sales)

These trends have profound implications for how retail suppliers seek to drive their sales

2012

2017

2022

Bricks & Mortar



E-Commerce



Suppliers negotiate with human on Price, Product, Placement & Promotion in both channels (supported by tech in e-comm)

Suppliers to e-commerce 'work' with the 'Price, Product, Placement & Promotion algorithm' (experiments in China by Alibaba to do the same in physical retail)

Suppliers work with algorithm stores as well as e-commerce

These trends imply a growing need for suppliers to identify successful strategies and to trade online successfully



AGENDA

1

Trends Driving Demand for Our Products

2

Our Products Today

3

The Vision


4

eCommerce Growth Platform in Development

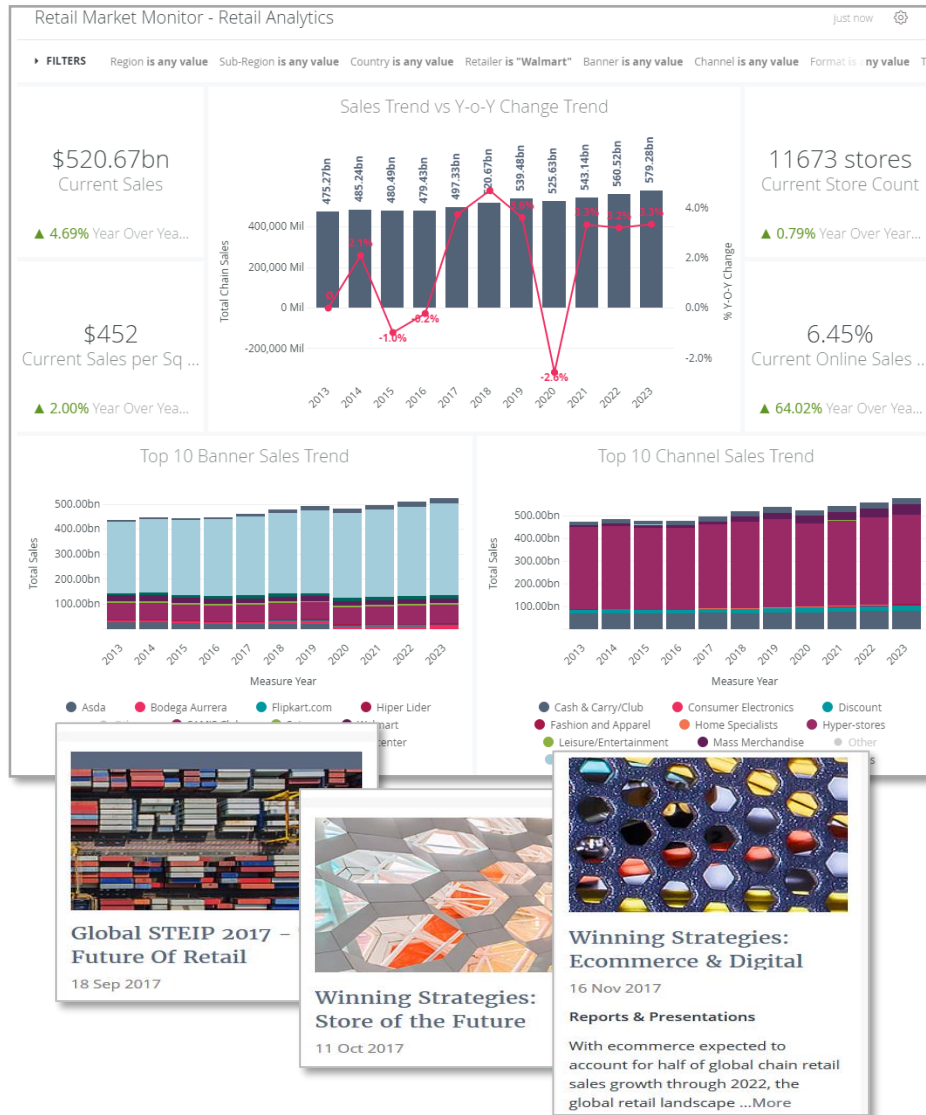
5

Q&A

Ascential's Retail Analytics Products

	Planet Retail RNG >	 One Click Retail	CLAVIS INSIGHT
2017 Rev	<ul style="list-style-type: none"> £11.0 (+3%) 	<ul style="list-style-type: none"> £12.1 (+58%) 	<ul style="list-style-type: none"> £13.4 (+29%)
FTE	<ul style="list-style-type: none"> C.50 	<ul style="list-style-type: none"> C.90 	<ul style="list-style-type: none"> C.170
Bus Model	<ul style="list-style-type: none"> 76% Subscription 20% Advisory 4% Events 	<ul style="list-style-type: none"> 96% Subscription 4% Advisory 	<ul style="list-style-type: none"> 95% Subscription 5% Advisory
Products	<ul style="list-style-type: none"> Retail Competitive & Market Intelligence Platform Advisory services 	<ul style="list-style-type: none"> Amazon Sales & Share Add on products: 3P, Traffictrack, Promotrack, Searchtrack 	<ul style="list-style-type: none"> 6Ps (Product, Price, Promotion, Placement, Perfect Page, and Performance) Digital Shelf Measurement
Geographic Coverage	<ul style="list-style-type: none"> Global 	<ul style="list-style-type: none"> US, Canada, UK, Germany, France, Italy, Spain, & Japan 	<ul style="list-style-type: none"> Global (500 Retailers)

The Products: PlanetRetail RNG >



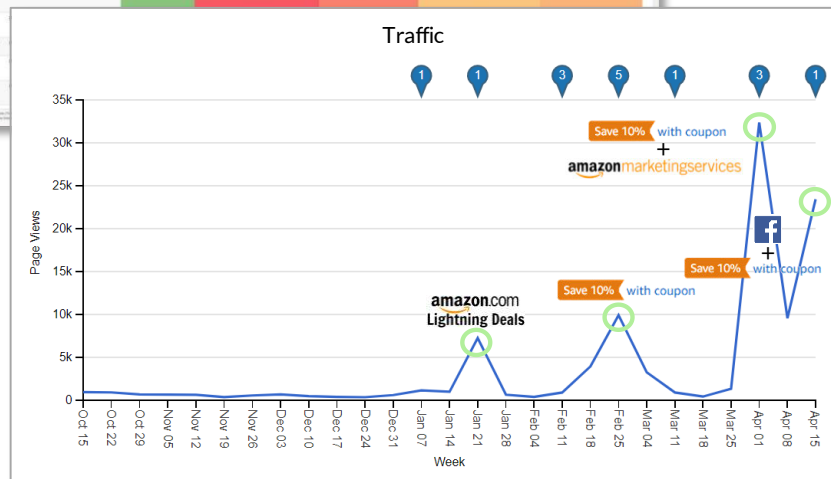
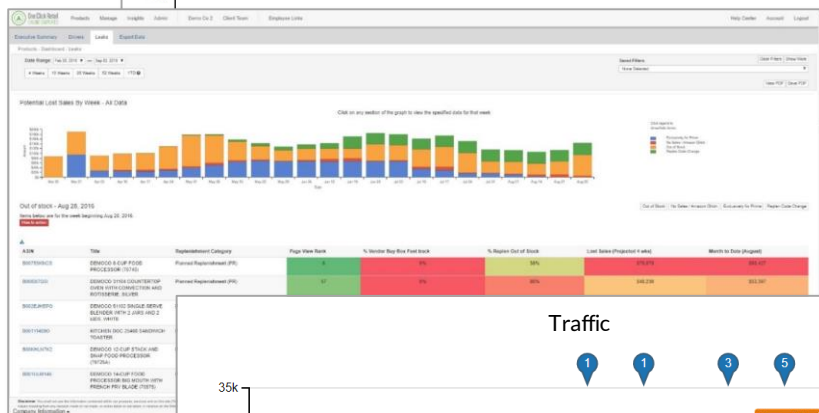
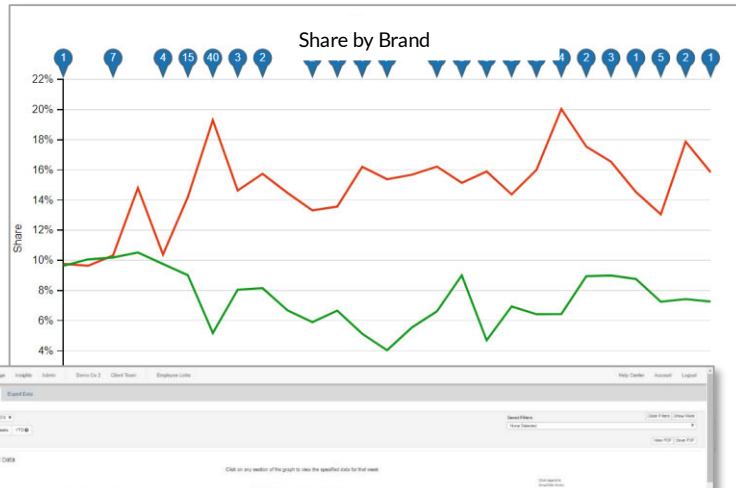
Proposition Overview

- **Retail competitive and market intelligence service enabling customers to assess 'where to play' and 'how to win':**
 1. **Forecasts** by country, retailer, banner and channel along with key associated stats (e.g. store numbers, size, sales per sq. meter...)
 2. **Disruption in retail insight reports** with case studies on retail platforms, markets, sectors and capabilities... reports apply two proprietary lenses:
 - STEIP – Society, Technology, Economy, Industry & Policy
 - 4 Winning Strategies: Ecommerce & digital ecosystem mgmt., store of the future, supply chain & fulfillment, and engagement & retention
 3. **Advisory services:** custom research, in-person updates & explorations, workshops, guided store tours

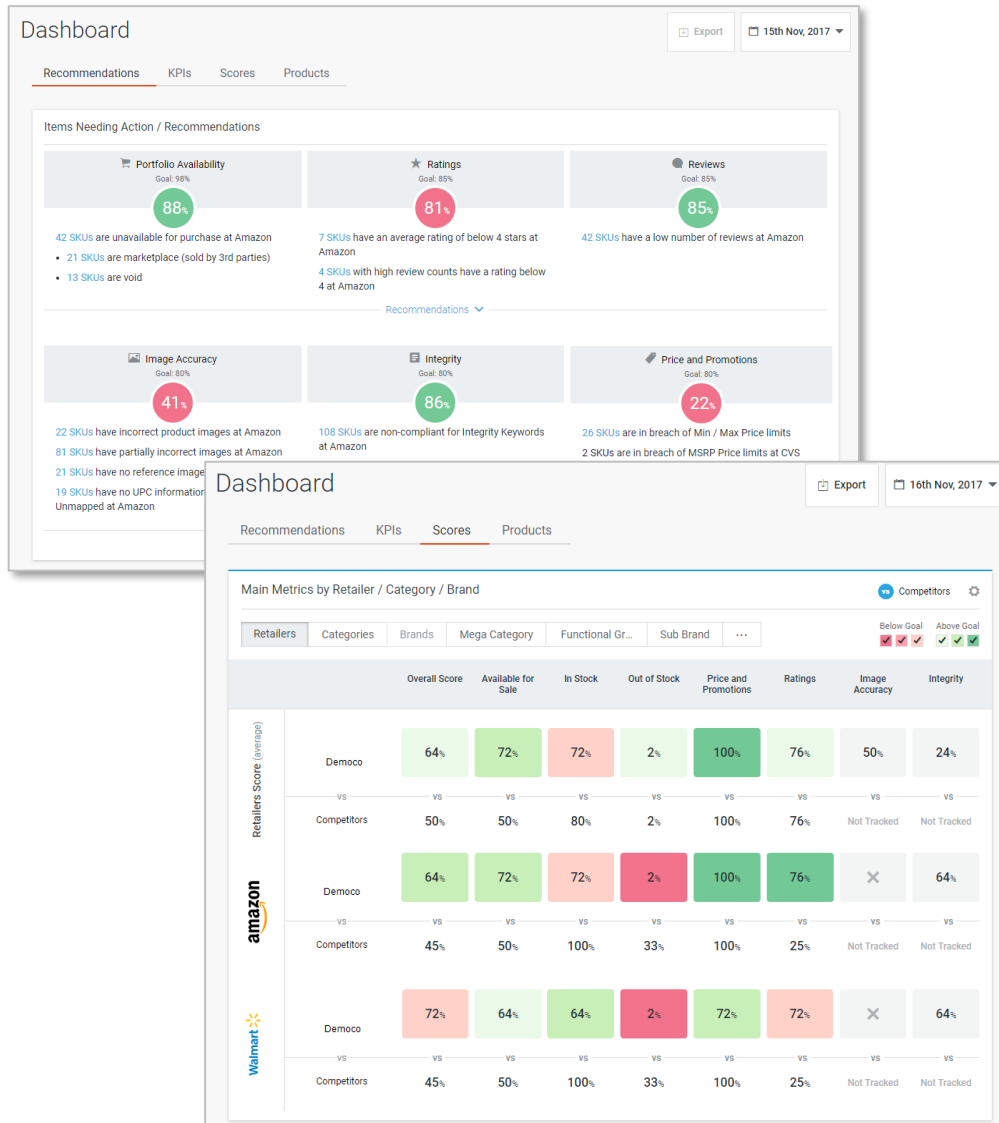
The Products: One Click Retail

Proposition Overview

- Sales & Share analytics platform enabling customers to optimise their sales on Amazon in US, UK, Germany, France, Spain, Italy & Japan:**
 - 1P & 3P Sales and Share:** sales and share evolution at SKU level derived from highly accurate estimation models, along with key drivers and action-oriented dashboards (enabling actions to counter, for example, revenue loss by SKU due to out of stock, shift to exclusively on Prime...)
 - Traffic:** derived traffic at SKU level (and hence conversion) from highly accurate estimation models along with key drivers to help identify which SKUs would benefit from greater marketing promotion
 - Promotions:** detailed promotions tracking to identify which price promotions to run (for example, given sustained growth in traffic and sales post the promotion)
 - Search:** identification of key words that would drive increased traffic through retitling, different descriptions, or use hidden keywords



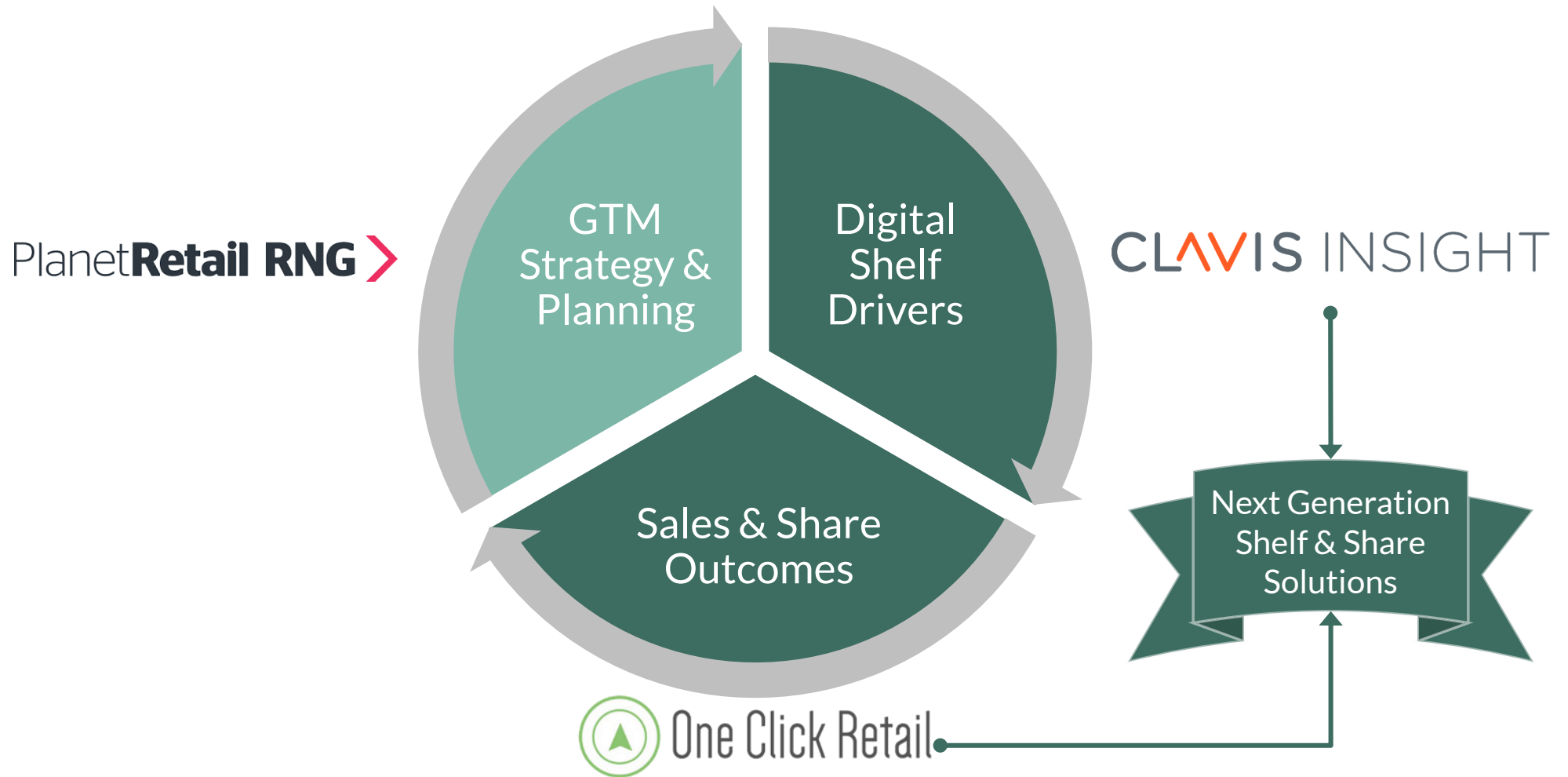
The Products: CLAVIS INSIGHT



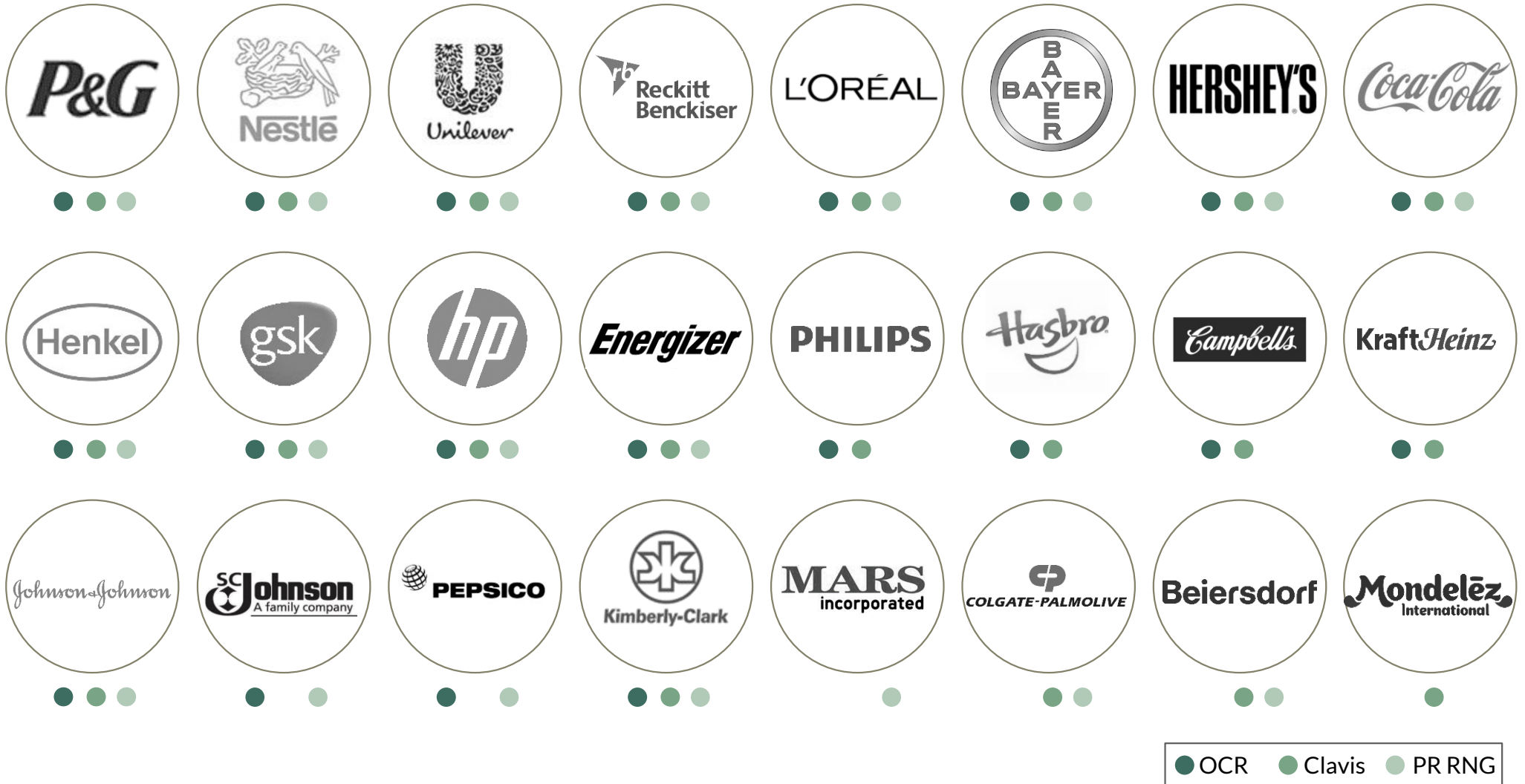
Proposition Overview

- Digital Shelf 6Ps eCommerce Intelligence™** platform enabling customers to optimise their e-commerce sales across 500 retailers globally, utilizing leading-edge proprietary technology to automate online retailer monitoring at scale
 - KPI dashboards for governance and measurement, enabling engagement and compliance
 - Product, Placement, Price, Promotions, Product Page, and Search Performance insights to identify and prioritize actions that drive growth
 - Content auditing to help protect and enhance brand equity
 - Consulting and Professional services led by in-market teams with over 100 years of eCommerce Retail & Insight experience, to ensure customer success and provide deep strategic analytics

The components of a holistic proposition



Example 2017 Customers



AGENDA

1

Trends Driving Demand for Our Products

2

Our Products Today

3

The Vision

4

eCommerce Growth Platform in Development

5

Q&A

The Vision

To create the most comprehensive, accurate and actionable digital retail strategy & analytics platform in the world

We have several advantages to build upon

Comprehensive

- Clavis provides the broadest retailer coverage (c.500) and deepest local market expertise (e.g. c.35 employees in Shanghai)
- OCR is unique in providing Traffic at a SKU level
- PR RNG's coverage spans omnichannel and pureplay retailers globally, along with all major retail markets

Accurate

- OCR has the largest historic and current client training set for its algorithms
- OCR's algorithms have been refined over 5 years
- Clavis & OCR have strong harvesting, data processing and cataloguing capabilities
- PR RNG has a highly refined market, retailer, channel and format forecasting methodology and serves 7 of the top 10 global retailers

Actionable

- All products are built with action-orientation based on input of largest customer base in the market and in-house e-commerce experts (often former CPG or Amazon / Walmart e-comm team members)
- Clavis & OCR support their customers with insights teams who identify key actions to be taken and provide recommendations on a weekly basis
- PR RNG offers custom advisory service with both omnichannel and e-commerce experts

To achieve our vision we will...

1. Bring the three companies together (integration underway), resulting in an overall rebrand of a 'new' company with multiple product lines
2. Extend our market leading propositions (e.g. redevelopment of PR RNG data tool, launch of Clavis multi-metric view, increase insights teams...)
3. Develop integrated shelf & share products, and enhance our digital retail insight reports leveraging shelf / share data
4. Seek out additional partnerships and M&A targets

AGENDA

1

Trends Driving Demand for Our Products

2

Our Products Today

3

The Vision

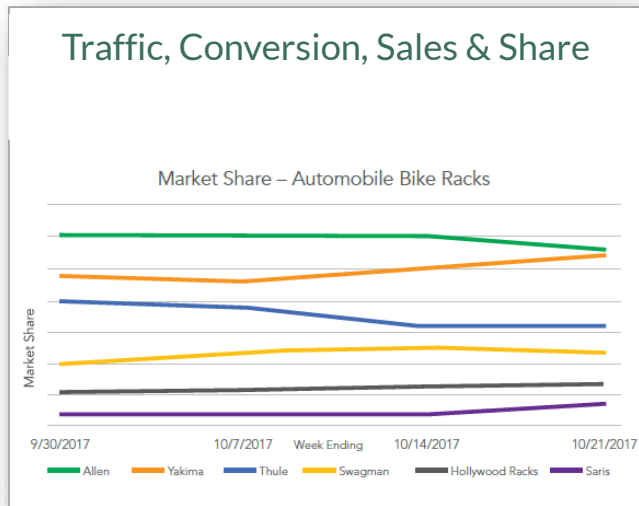
4

eCommerce Growth Platform in Development

5

Q&A

Customers will realize new benefits from joining digital shelf with share

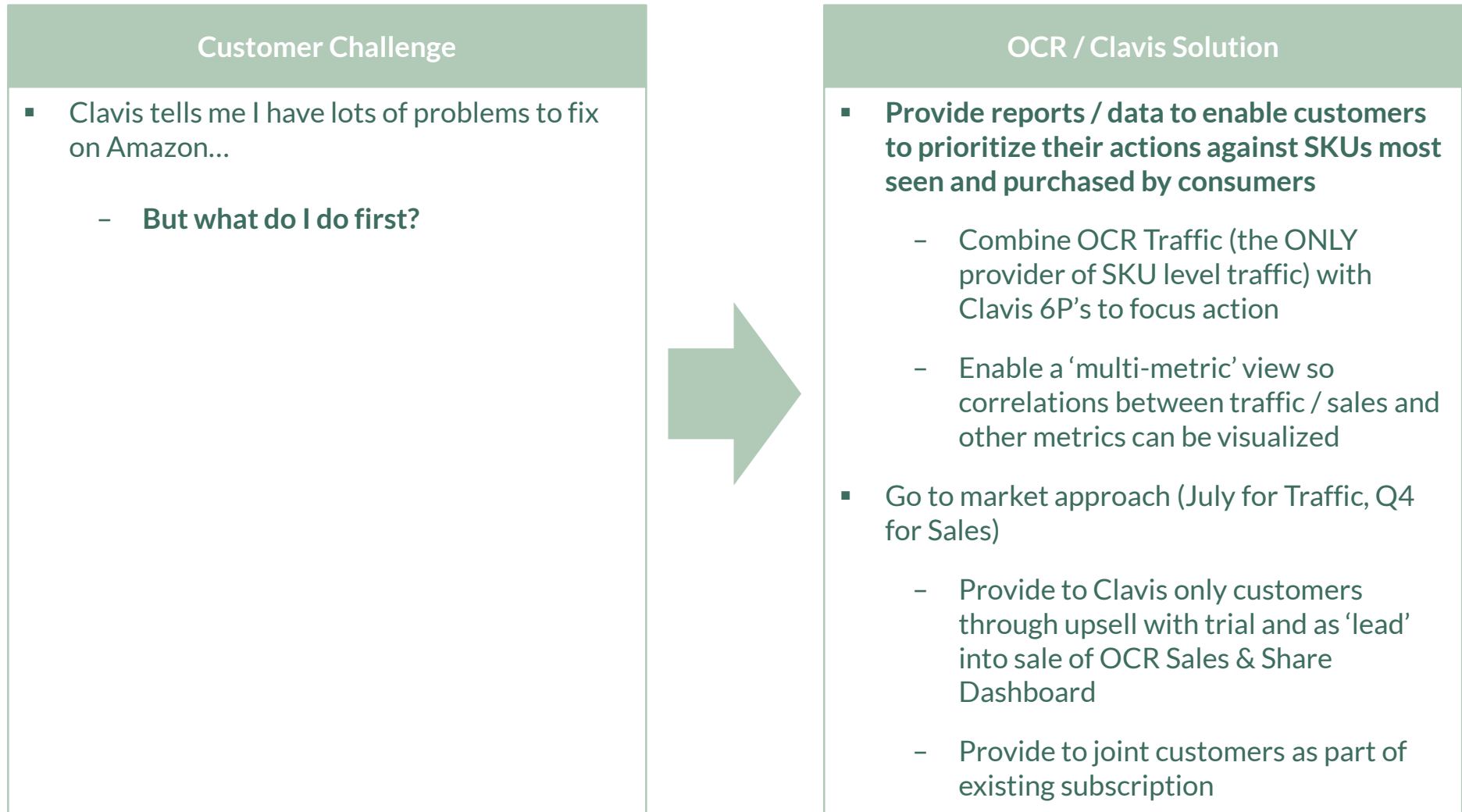


6Ps E-commerce Intelligence

Main Metrics by Retailer / Category / Brand

Retailer	Brand	Overall Score	Available for Sale	In Stock	Out of Stock	Price and Promotions	Ratings	Image Accuracy	Integrity
Democo	Democo	64%	72%	72%	2%	100%	76%	50%	24%
	Competitors	50%	50%	80%	2%	100%	76%	Not Tracked	Not Tracked
amazon	Democo	64%	72%	72%	2%	100%	76%	✗	64%
	Competitors	45%	50%	100%	33%	100%	25%	Not Tracked	Not Tracked
Walmart	Democo	72%	64%	64%	2%	72%	72%	✗	64%
	Competitors	45%	50%	100%	33%	100%	25%	Not Tracked	Not Tracked

1. We are integrating Amazon ASIN-level traffic estimates and sales into Clavis

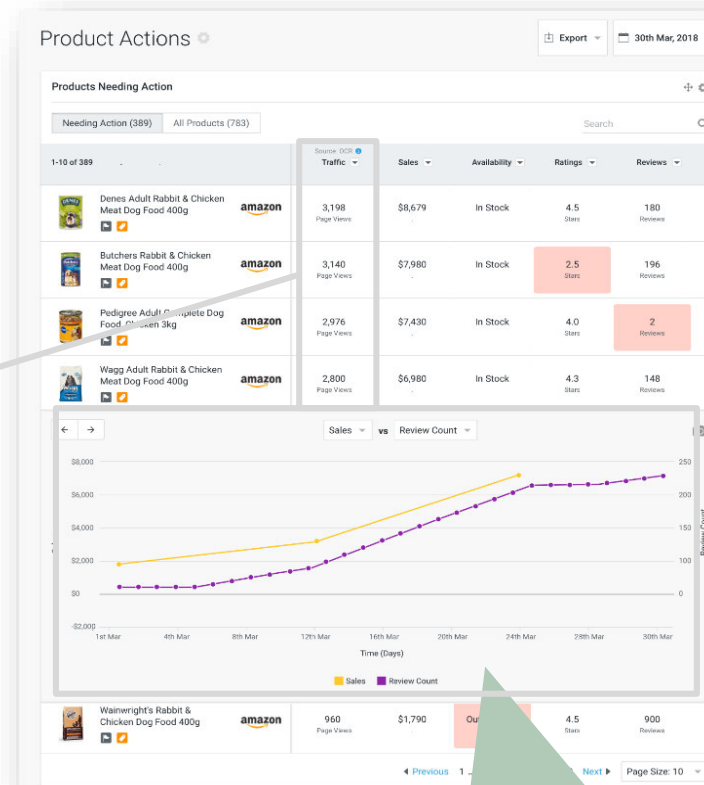


Amazon ASIN-level traffic estimates in Clavis & multi-metric view

Prioritize Actions

...the same way Amazon does, based on eyeballs to your detail pages

	Source: OCR	Traffic	Sales
amazon		3,198 Page Views	\$8,679
amazon		3,140 Page Views	\$7,980
amazon		2,976 Page Views	\$7,430



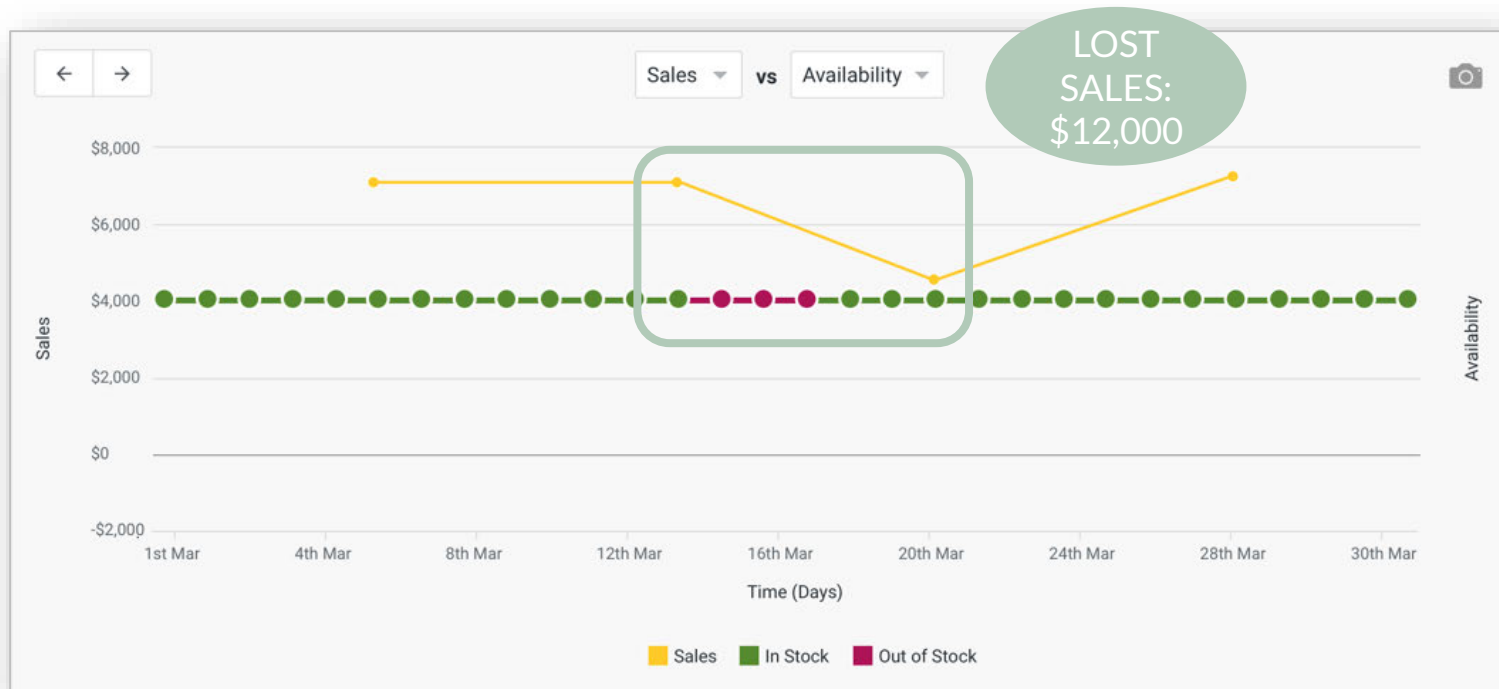
Visual Correlation with multi-metric view

...so you can see how (and if) one action or metric impacts another

User Feedback

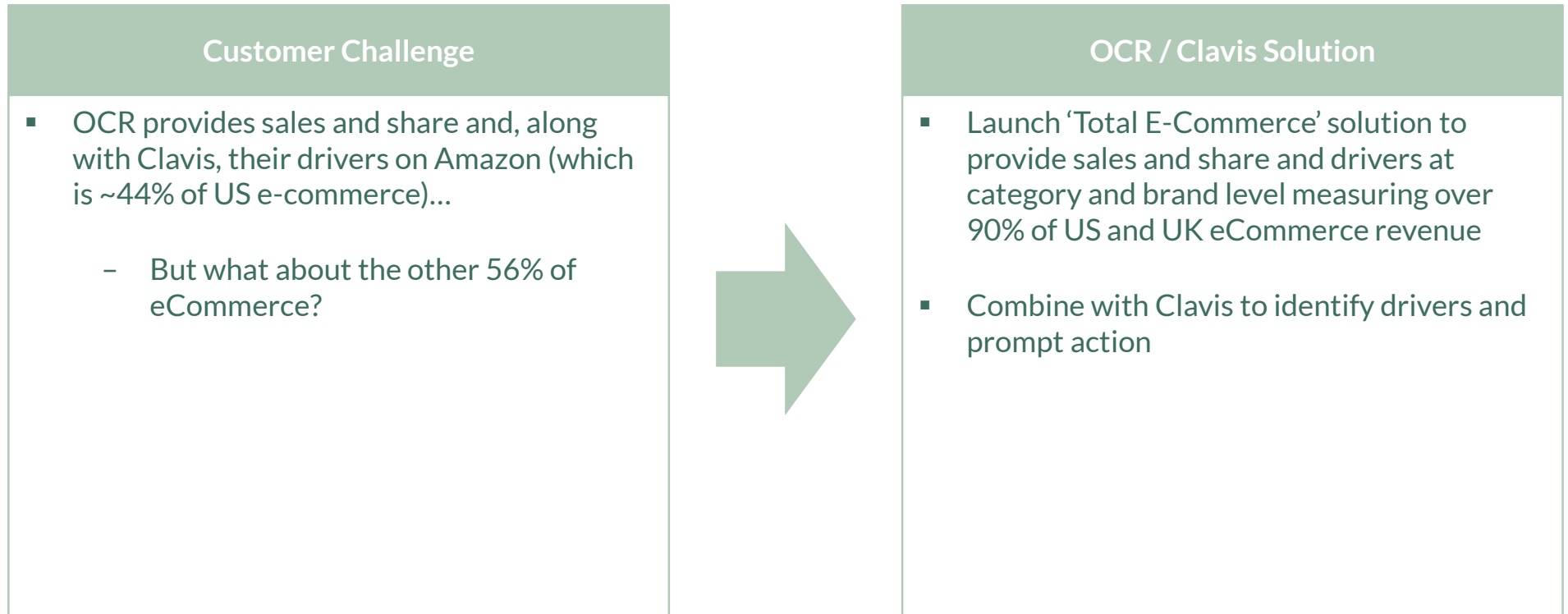
- "Very useful correlation report one of my favorites... is what everyone wants"
- "I like the action oriented side at the product level"
- "Great look at comp items on key metrics. Love it."

Example use case for multi-metric view



- **What happened?**
 - Item ABC123 went out of stock for 3 days and took two weeks to recover fully
- **So What?**
 - \$12,000 in lost revenue
- **Now What?**
 - The Account Manager would identify the break down in the supply chain and improve inventory positions so stock outage does not happen again

2. We are creating a new, 'total e-commerce' solution



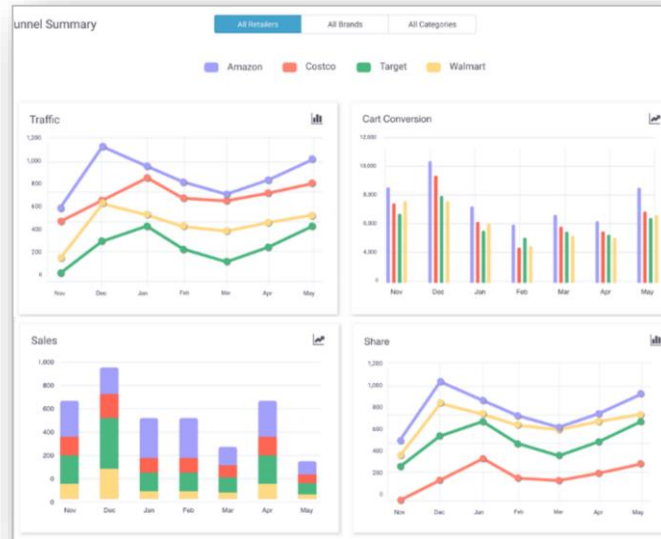
Total E-commerce: Preliminary Mock ups

Weekly Summary

TRAFFIC is up ^ 2% overall
 with gains at Walmart ^ +6% WoW
 & declines at BestBuy v -2% WoW

CONVERSION is down v 15% overall
 top decrease at Walmart v -6% WoW

SALES are up ^ 3% overall WoW
 with gains at Walmart ^ +6% WoW
 & declines at Target v -3% WoW



Double click to drill into 6P's drivers and actions

Share

Filters: Retailers | Categories | Brands | Sub-Category

RETAILERS	4 WEEK	12 WEEK	26 WEEK	52 WEEK
	15,467 ^ 5%	15,467 ^ 1%	15,467 v 11%	15,467 v 16%
	15,467 ^ 8%	15,467 ^ 2%	15,467 ^ 12%	15,467 ^ 13%
	15,467 v 11%	15,467 ^ 1%	15,467 ^ 12%	15,467 ^ 7%
	15,467 ^ 12%	15,467 v 3%	15,467 ^ 9%	15,467 ^ 12%
	15,467 ^ 12%	15,467 ^ 14%	15,467 v 2%	15,467 ^ 12%






Executive Dashboard summaries for quick leadership view

User Feedback

- "I think the idea of linking sales / conversion / traffic data with execution information (content, availability, etc.) is great."

Total E-commerce: Preliminary Mock ups

High Priority Fixes

PRIORITY	IMPACT	ACTION TO DO	PRODUCT
1	\$6,000 - \$10,000	Add A+ Enhanced Marketing Content Show me how	 HUGGIES Natural Wipes, 3 Refill Pa Item: A12BCDEF34
2	\$4,500 - \$5,500	Add Product Image Show me how	 Luvs Ultra Leakguards Disposable Diapers Size 5, 140 Count... Item: 423517555
3	\$3,300 - \$3,500	Add Brand Keywords in Product Title Show me how	 Charmin Ultra Soft Toilet Paper, Family Mega Roll with Cushiony... Item: 16996789
4	\$2,200 - \$2,900	Add Product Image Show me how	 Tide PODS 3 in 1 HE Turbo Laundry Detergent Pacs, Spring... Item: B33BJNDG33
5	\$2,300 - \$2,800	Add Product Description Show me how	 Glad Tall Kitchen Drawstring Trash Bag 13 Gallon - 90 Count Item: 42351444

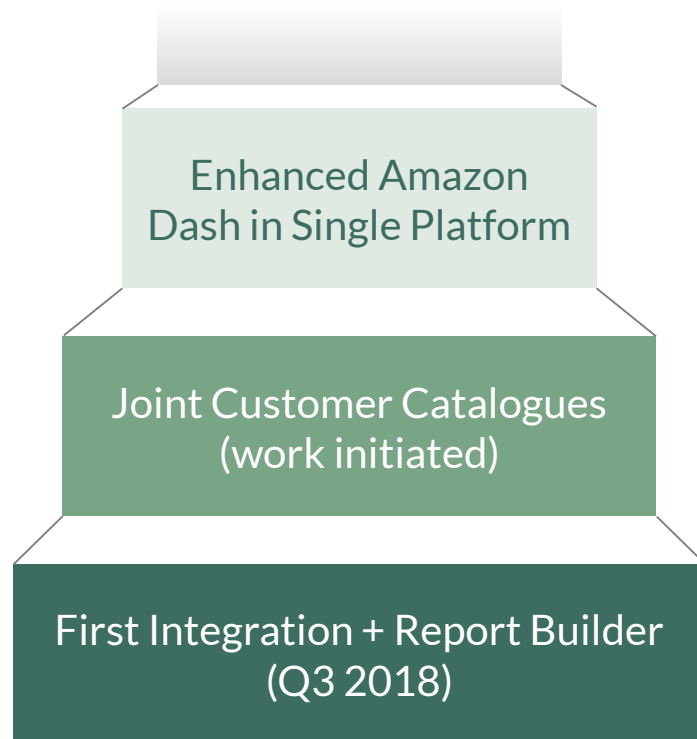
[Show More](#)

Prioritized actions based on \$ impact to your business, leveraging Clavis and OCR data to deliver new, easy to action insights

User Feedback

- “I like the display of \$ impact estimate and direct actions to take on the digital shelf with the "show me how" prompt. Very actionable.”
- “Overall I like the weekly summary, "top things to fix" section with actions and forecasted impact, and charts with further detail.”

3. We are laying the foundations for a fully integrated, enhanced 'Amazon' dashboard



- Single platform with enhanced Amazon share and shelf reports
- Customer data on like for like basis between Clavis and OCR, enabling integration of Share with Clavis metrics
- Underlying tech changes to enable integration
- UI that enables customer (and Ascential dev teams) to build multi-metric reports

AGENDA

1

Trends Driving Demand for Our Products

2

Our Products Today

3

The Vision

4

eCommerce Growth Platform in Development

5

Q&A

MARKETING



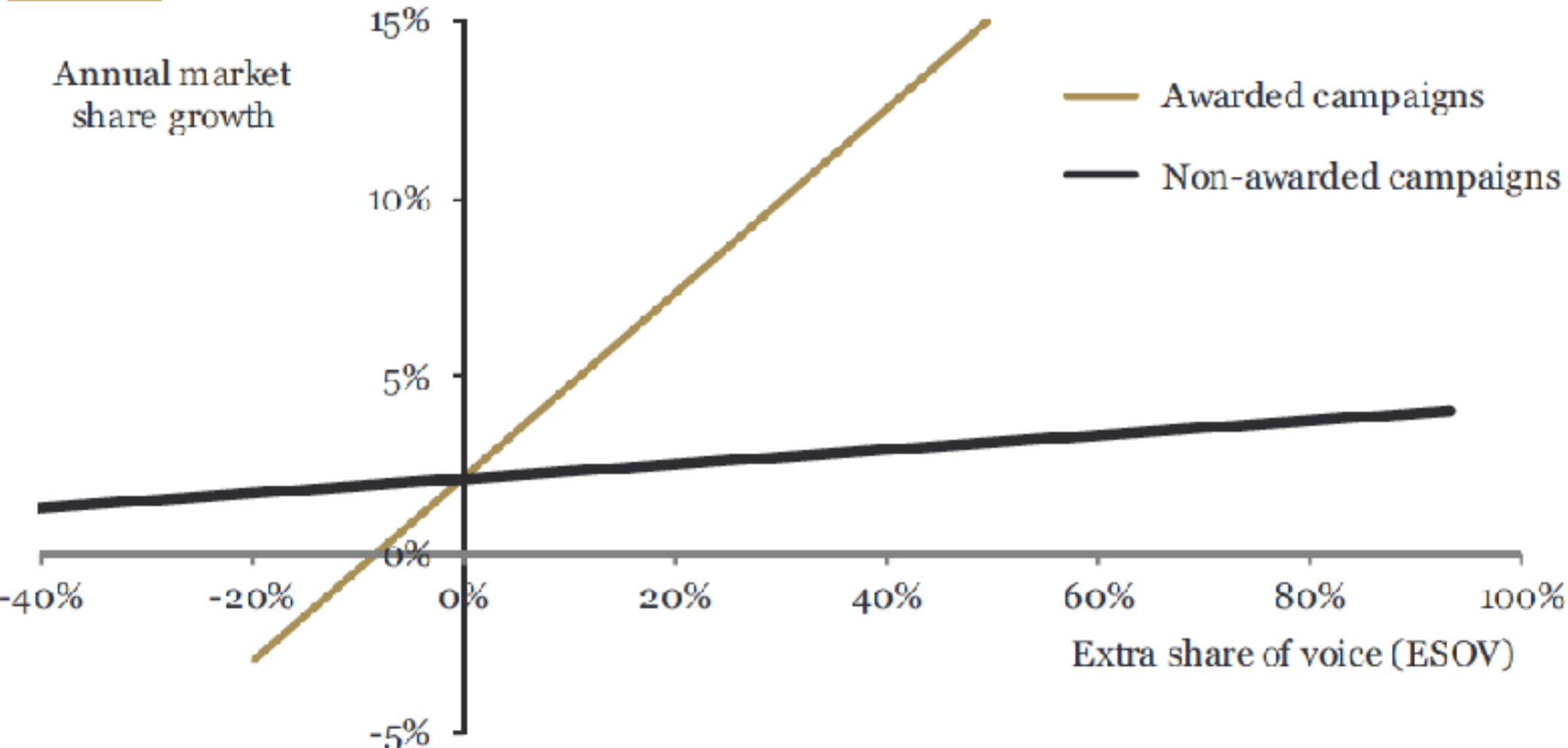
THE WORK



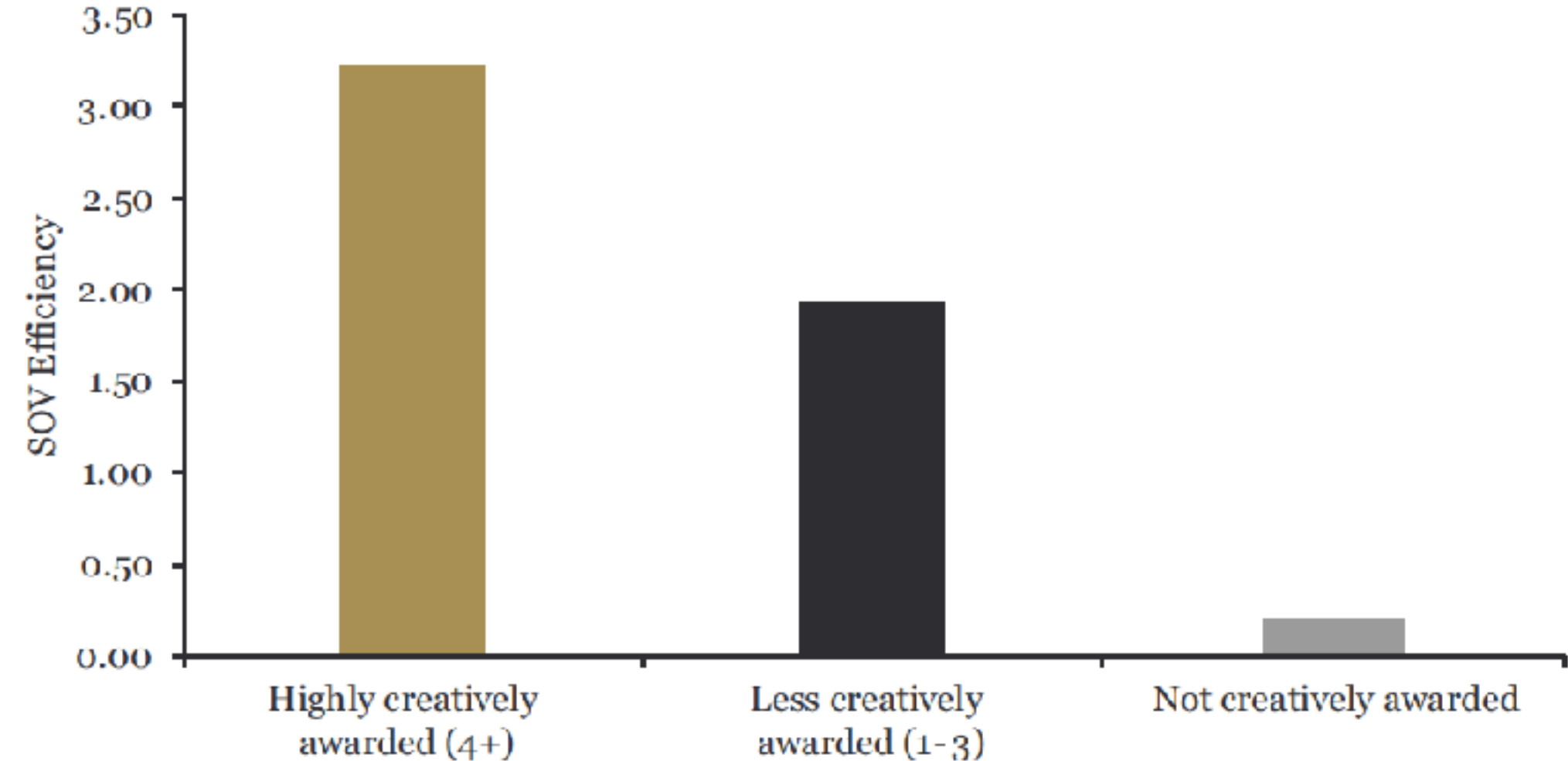
Painting by Numbers, Vitaly Kumar & Alexander Melami, 1994

Creativity matters

The relationship between ESOV and share growth for awarded and non-awarded campaigns (1996-2014)



Very highly awarded campaigns are the most efficient of all (1996-2014)



Just make better advertising, stupid



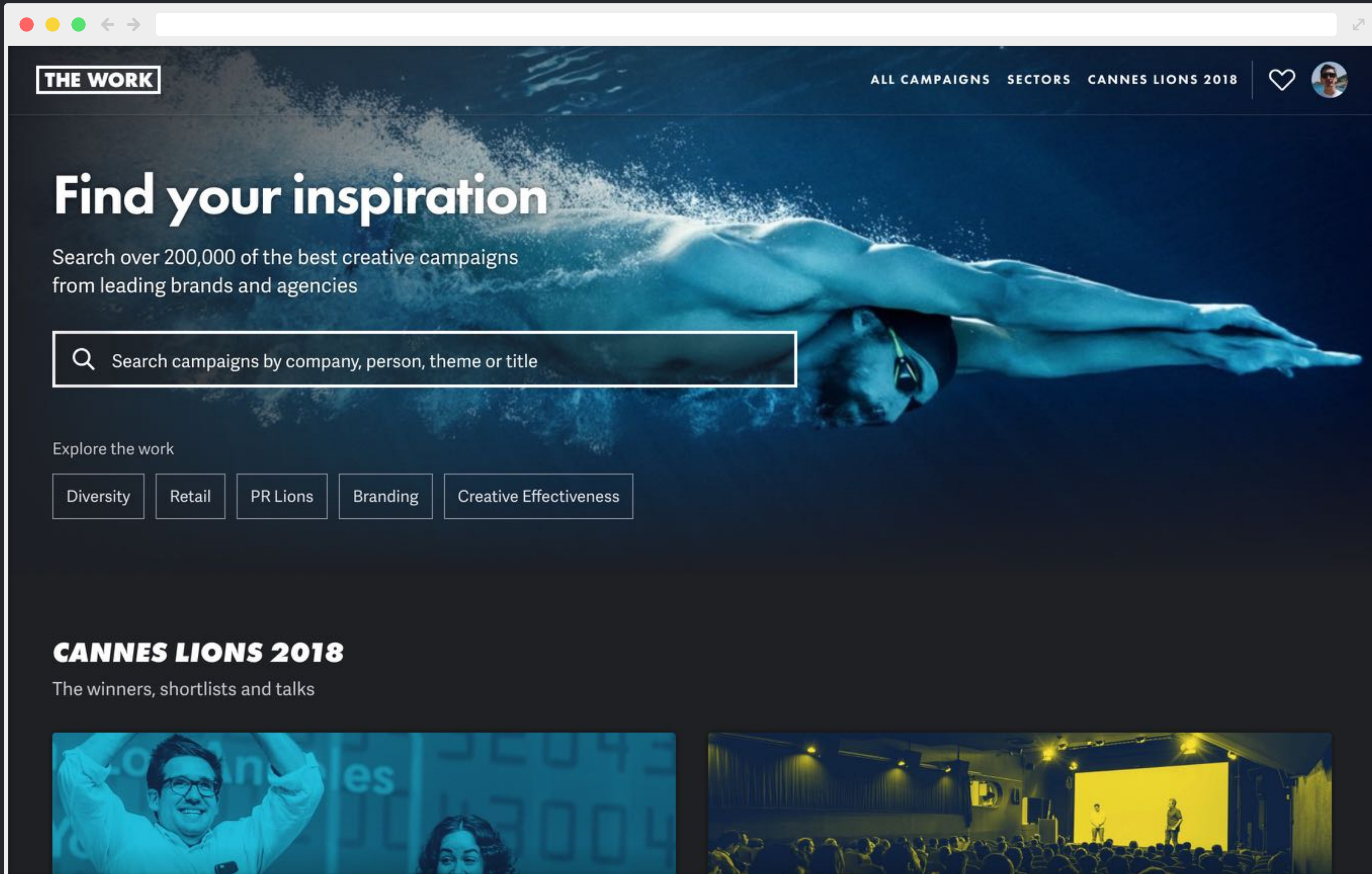
BLACK LEVI'S.



WHEN THE WORLD ZIGS, ZAG.

80% selling the idea





Try the product at lovethework.com

Engagement with Cannes Lions Digital Touchpoints

PLANNING

APP & WEB

NETWORK

BEFORE

DURING
FESTIVAL

AFTER

Engagement with Cannes Lions Digital Touchpoints

PLANNING

APP & WEB

NETWORK

THE WORK

BEFORE

DURING
FESTIVAL

AFTER

Future: Content

The screenshot shows a web browser window with a dark theme. The top navigation bar includes the logo 'THE WORK', a search bar with the text 'Search for Inspiration', and a 'Campaigns' dropdown menu. On the right side of the navigation bar, there are links for 'ALL CAMPAIGNS', 'SECTORS', and 'CANNES LIONS 2018', along with a heart icon and a user profile picture.

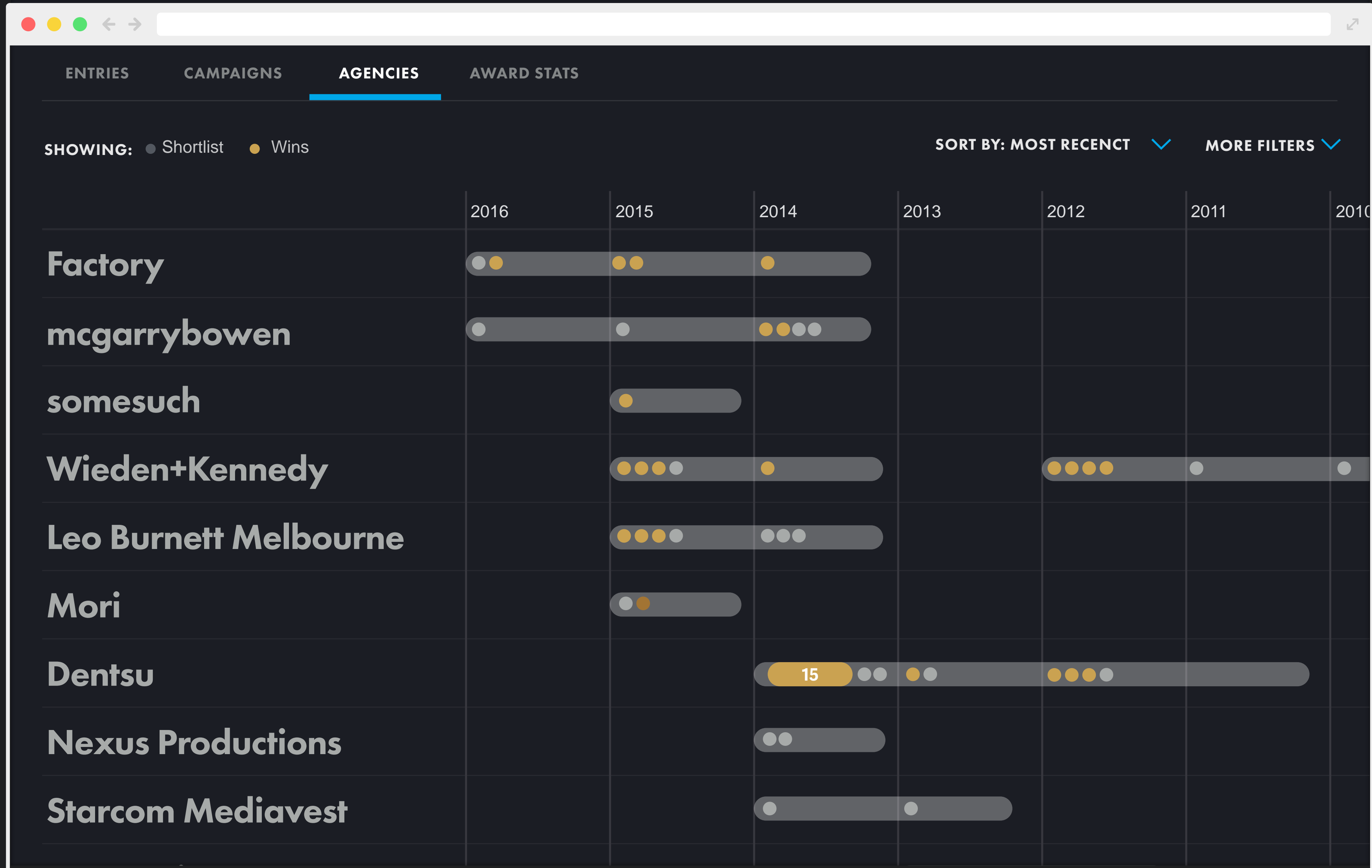
The main content area features a large hero section with a background of overlapping geometric shapes in shades of brown, teal, and black. A white rectangular box in the center contains the word 'VINTAGE' in bold, white, uppercase letters. Below this box, the text 'Vintage collection sub heading comes here' is displayed.

Below the hero section, there is a grid of three featured items, each with a 'VINTAGE' label in the top left corner:

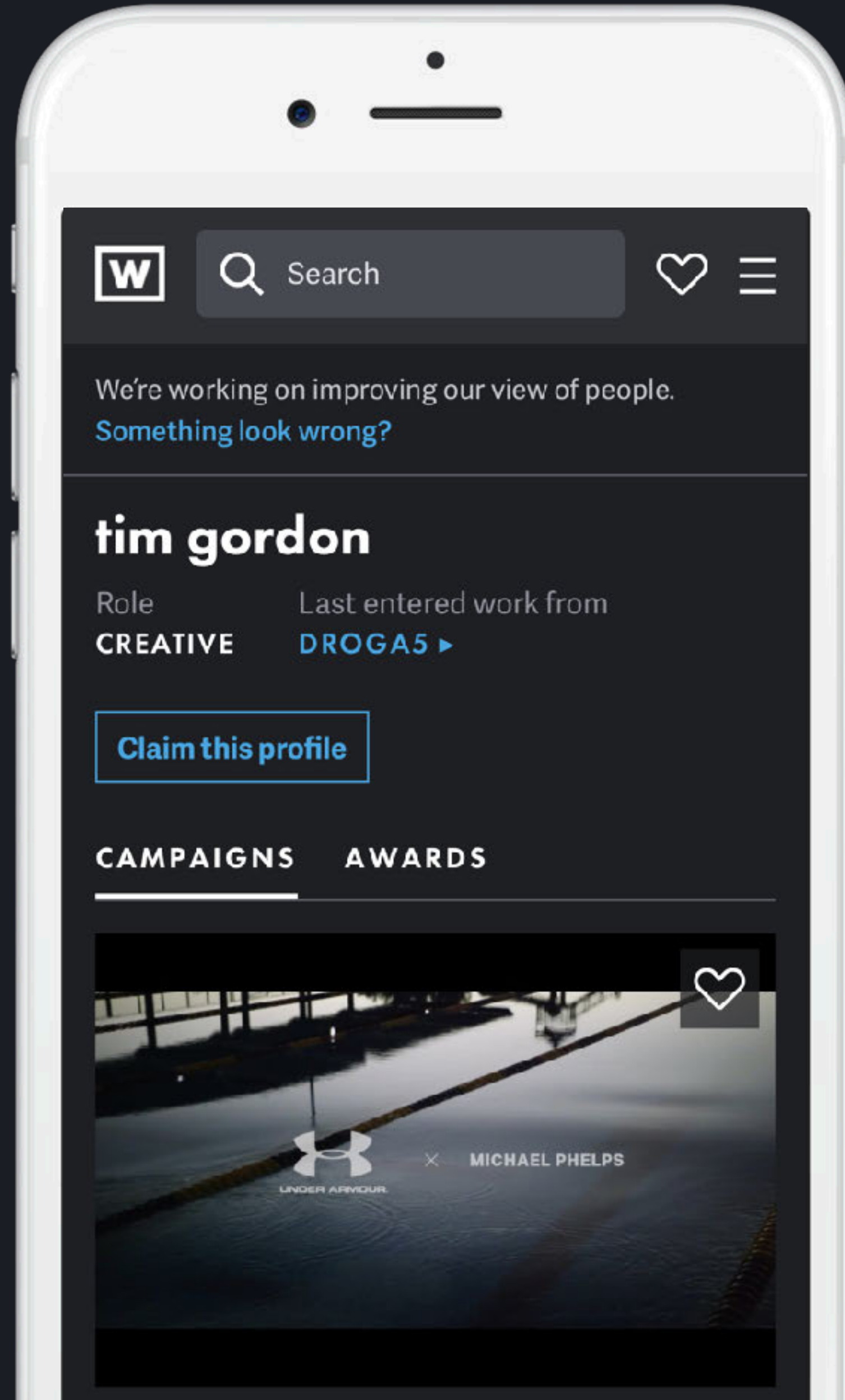
- Cinema and Television Grand Prix**
1971 · VOLVO
A photograph of a man in a brown suit driving a car.
- Television Silver Lions Reel 2**
1969 · UNILEVER · OGIIVY & MATHER
A photograph of a Burger King restaurant sign that reads 'BURGER KING HOME OF THE WHOPPER'.
- Health Is**
2017 · HCF · THE SWEET SHOP
A photograph of an elderly man in a suit holding a red bag.

At the bottom of the page, the top corners of three more items are visible, each with a 'VINTAGE' label.

Future: Data & effectiveness



Future: People



Questions?

JUNE 20, 2018

THE STATE OF MEDIA & MARKETING

MEDIALINK

NEW YORK

LONDON

LOS ANGELES

CHICAGO

SAN FRANCISCO

THE RULES OF ENGAGEMENT



1. As consumer attention fragments, embedded utility becomes a must for differentiated consumer experience
2. Fragmentation of commerce cannot be solved with plans designed for the fragmentation of media
3. As the new monopolies solidify closed ecosystems, look for distinct business needs that require an independent third party.
4. Compounding an ongoing grab for talent, marketers are overwhelmed attempting to navigate the complex data and technology ecosystem that enables precision marketing
5. And the one rule so simple you won't believe it....



DRIVE TO THE CONSUMER



CREATING THE UNIVERSE THAT MARKETERS LIVE IN

“If you want to bake an apple pie from scratch, first you have to create the universe.”

- Carl Sagan

Socioeconomic

Commerce

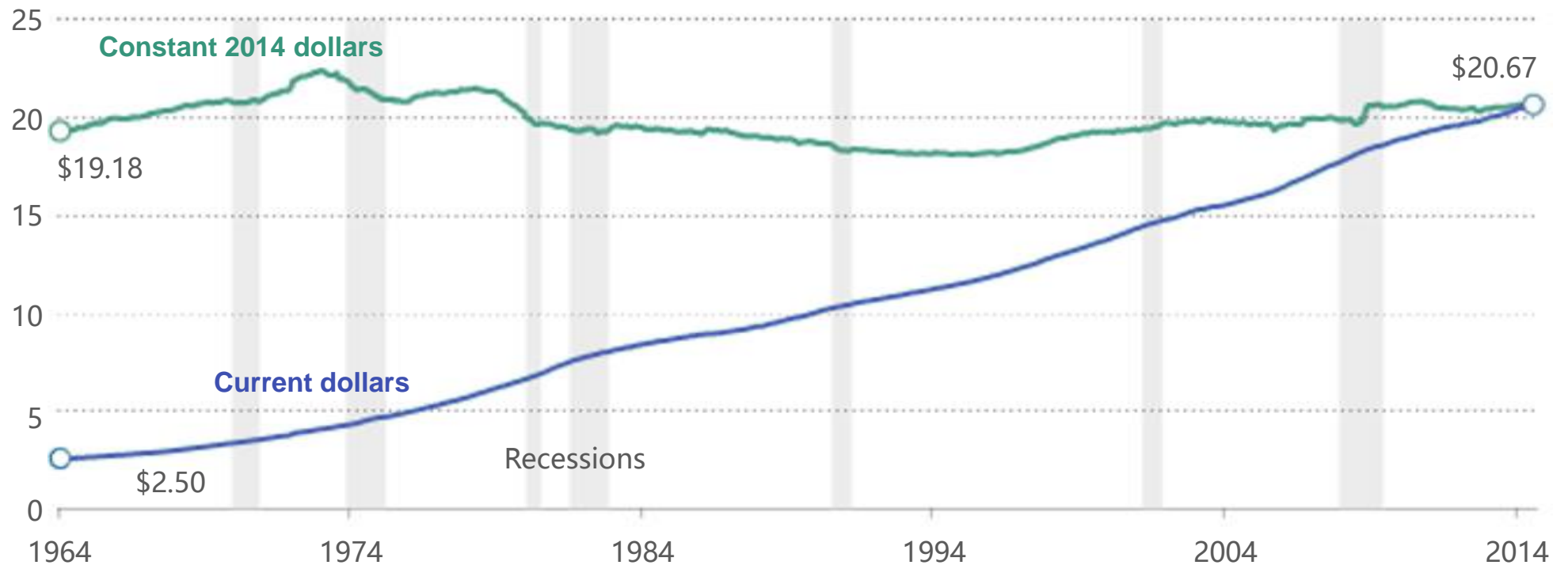
Media

Marketing



FLAT CONSUMER SPENDING POWER CREATES ZERO-SUM BATTLE AMONG BRANDS

Avg. Hourly Wages (seasonally adjusted)

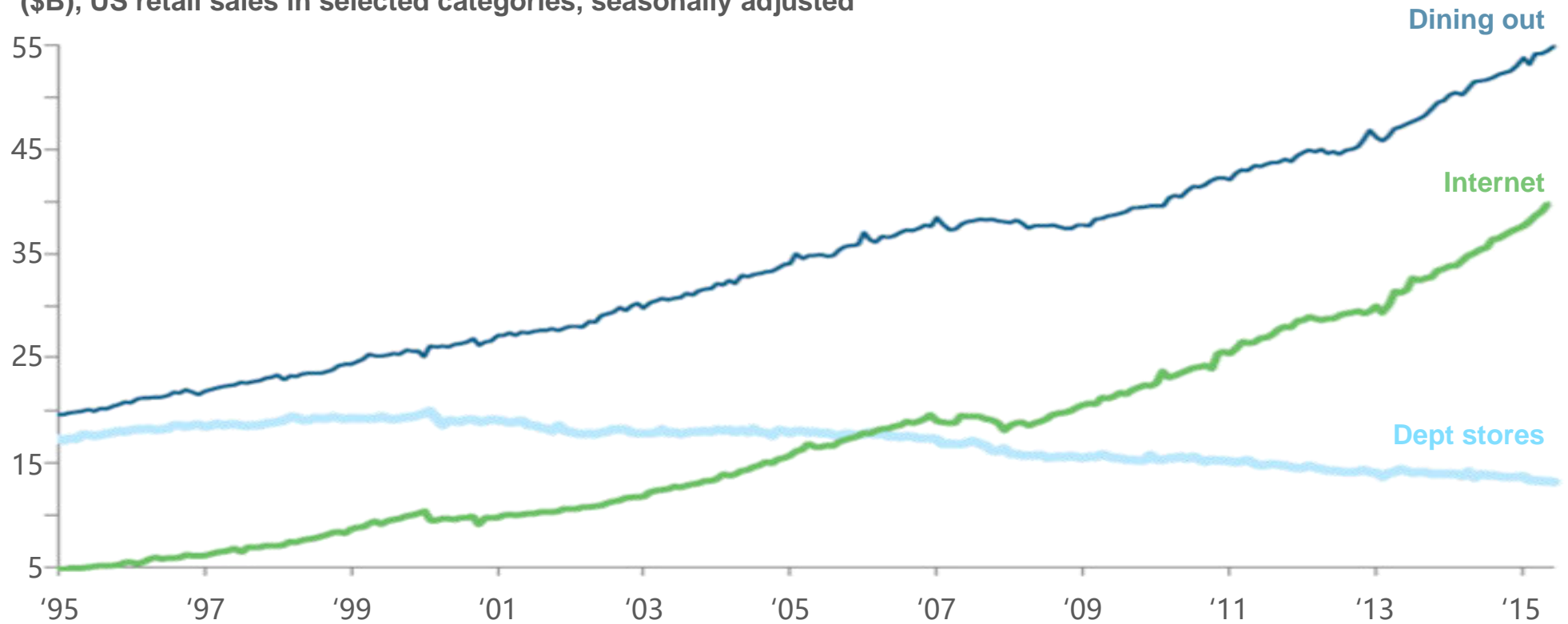


Note: Data for production and non-supervisory employees on private non-farm payrolls
Sources: Bureau of labor statistics, Pew Research Center, Bloomberg (last data for internet sales: Apr 2016; other: May 2016); Standard Chartered Research



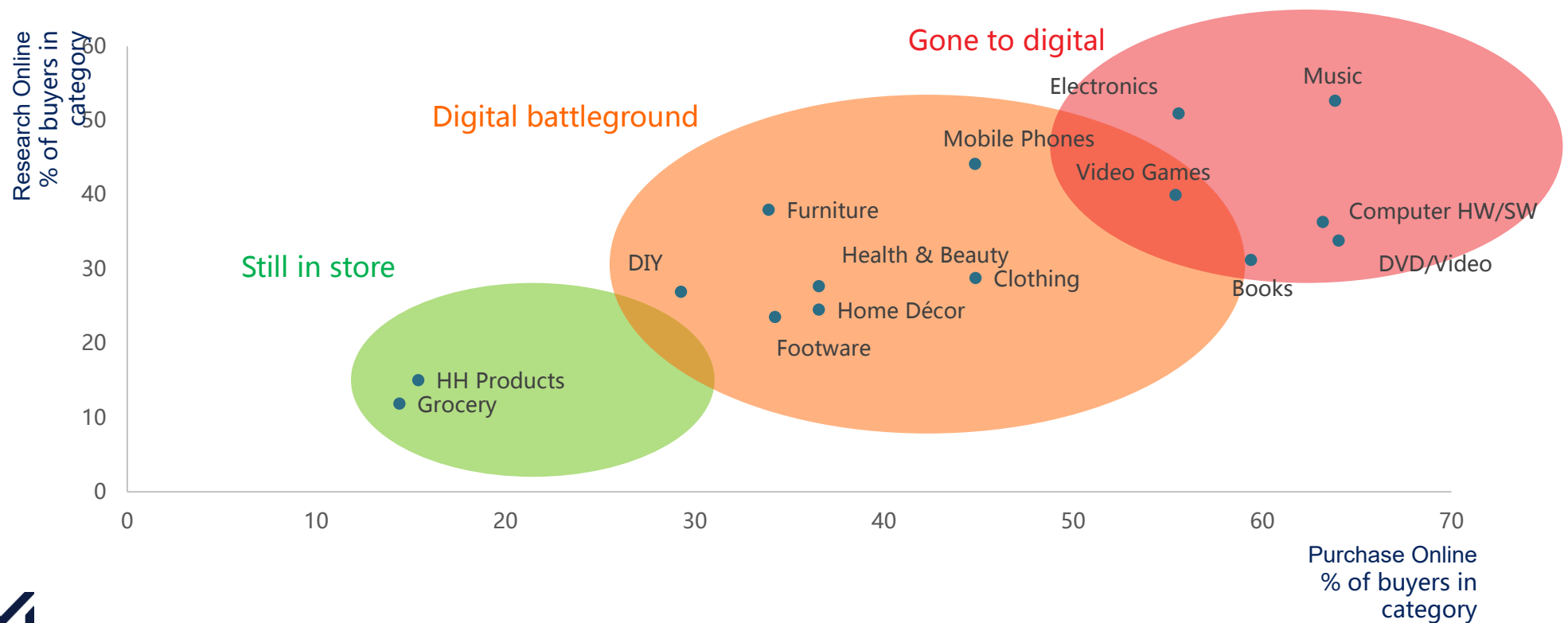
SPENDING SHIFT TOWARD EXPERIENTIAL RETAIL COMPOUNDS SECULAR THREAT OF ECOMMERCE

(\$B), US retail sales in selected categories, seasonally adjusted



FRAGMENTATION OF COMMERCE IS EXTREMELY DISRUPTIVE TO MARKETING

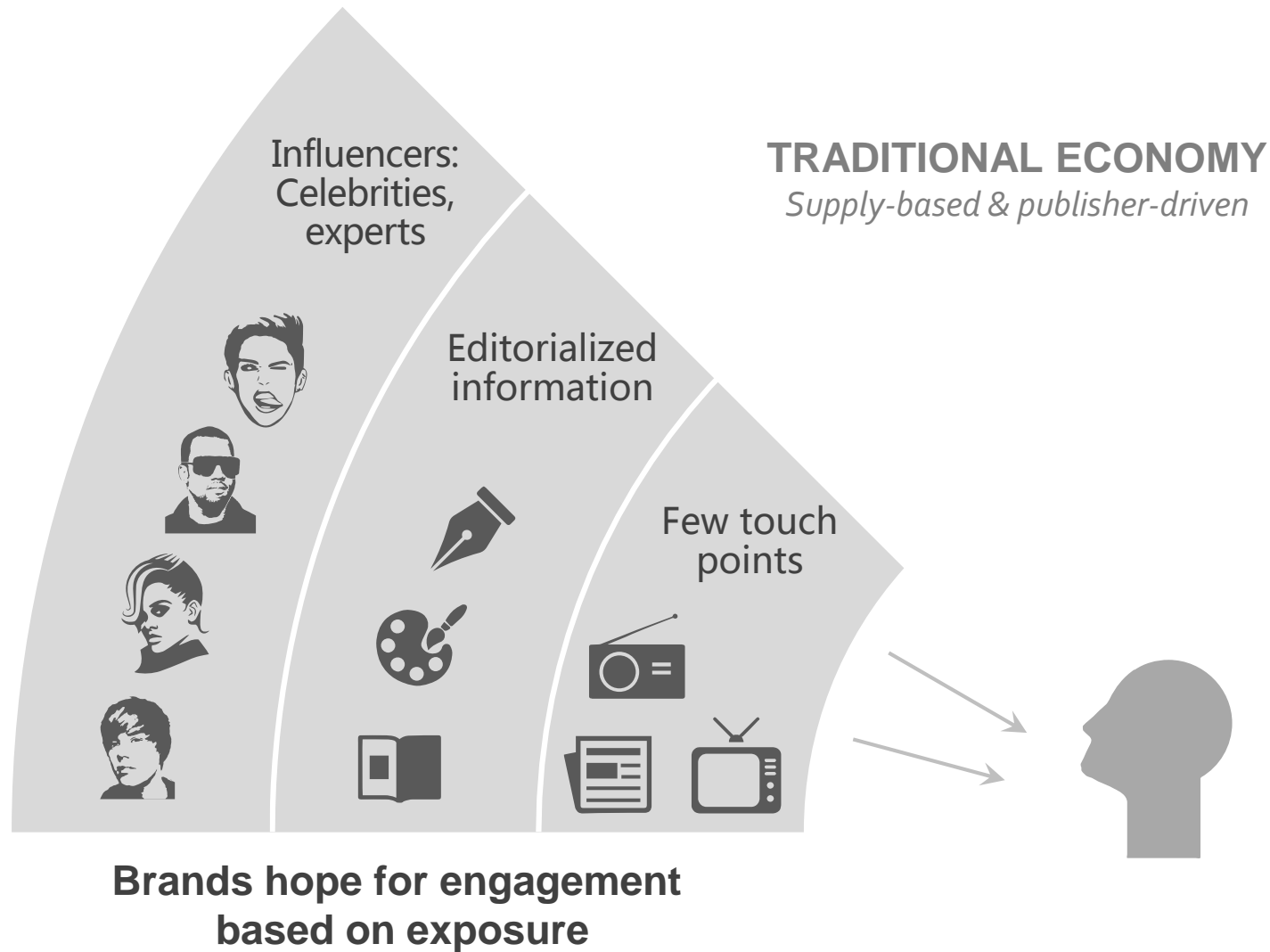
- Greater choice
- Instantaneous decisions
- Mobility
- Mass / scaled / global 1:1 and 1: millions connectivity



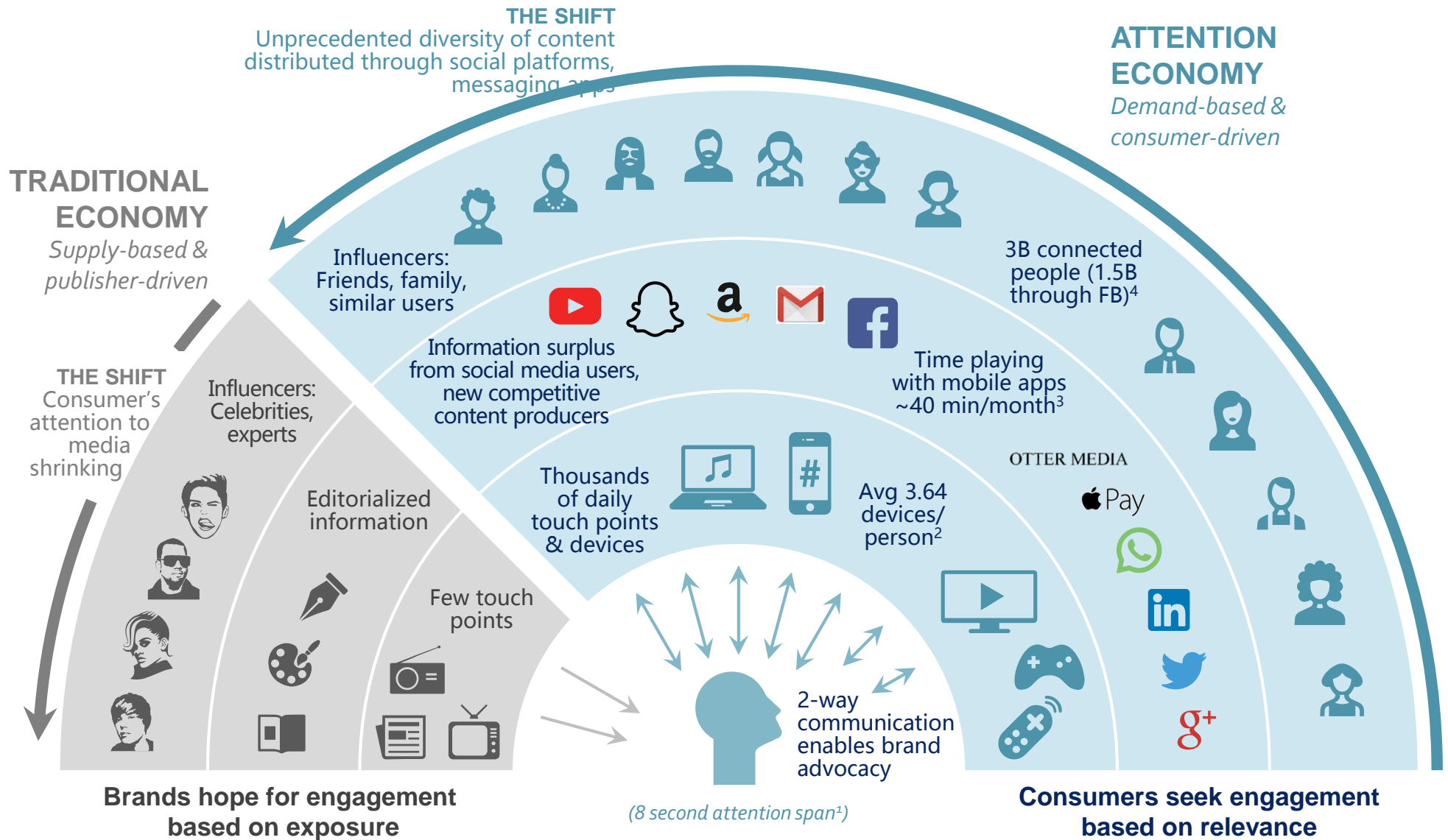
Source: McKinsey iConsumer research



EVOLUTION OF MEDIA CONSUMPTION: THE “ATTENTION ECONOMY”

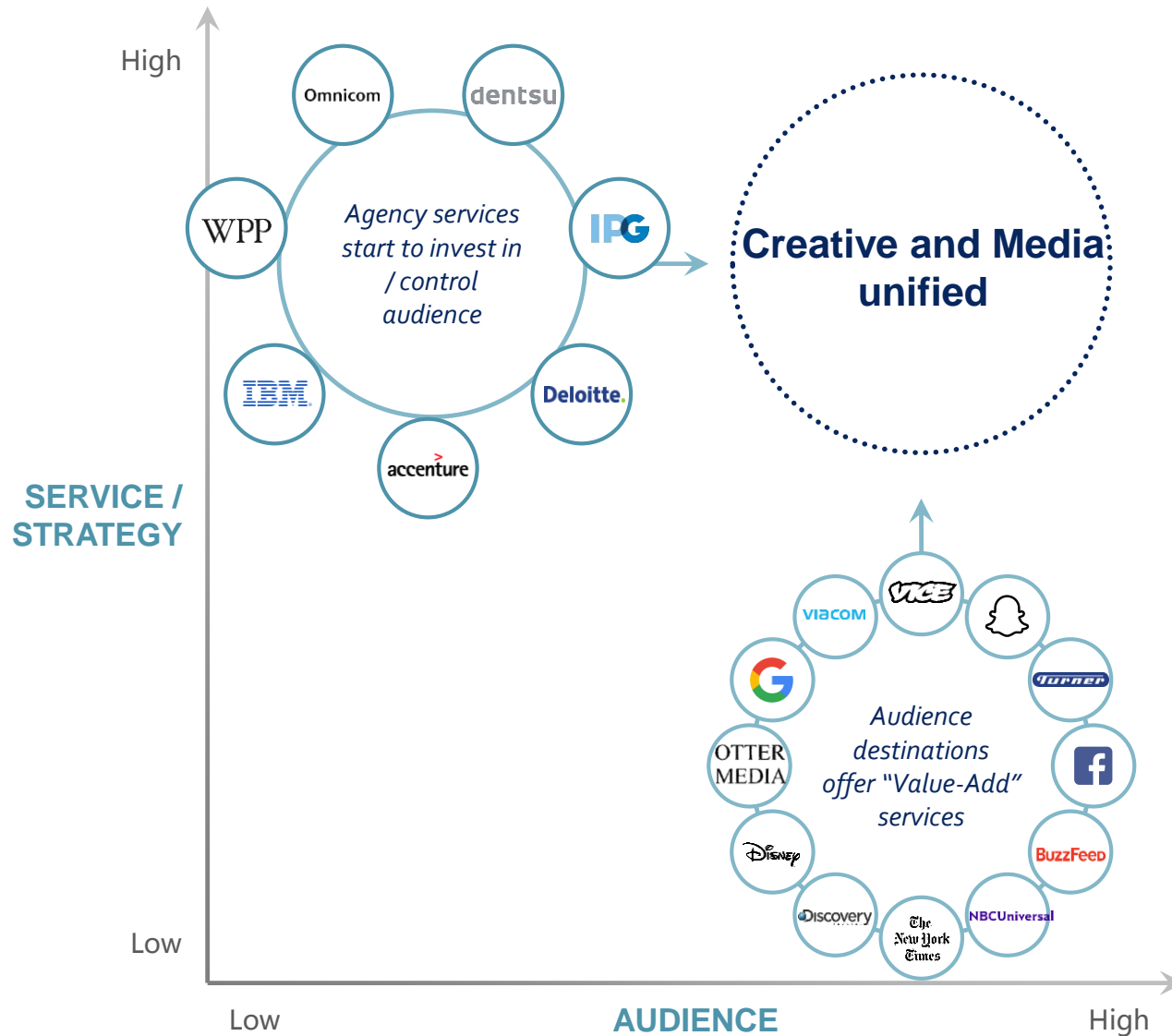


TODAY'S ATTENTION ECONOMY



1. Microsoft 2016 2. Global Web Index 2015 3. Nielsen Q4 2014 4. <http://www.edelman.com/10-trust-barometer-insights/>

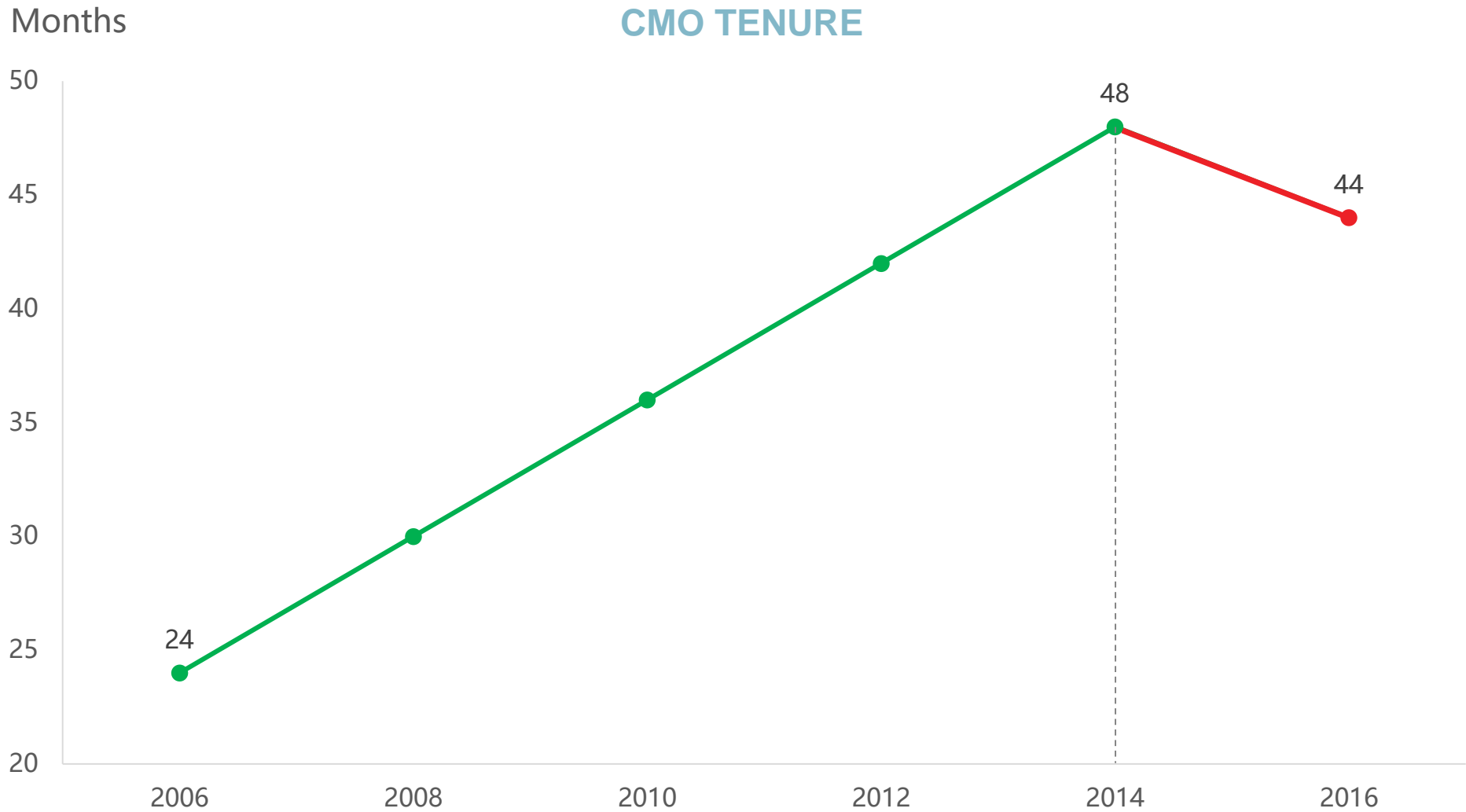
...AS THE ECONOMICS OF MEDIA INVENTORY BECOME LESS ATTRACTIVE



MIND OF THE MARKETER

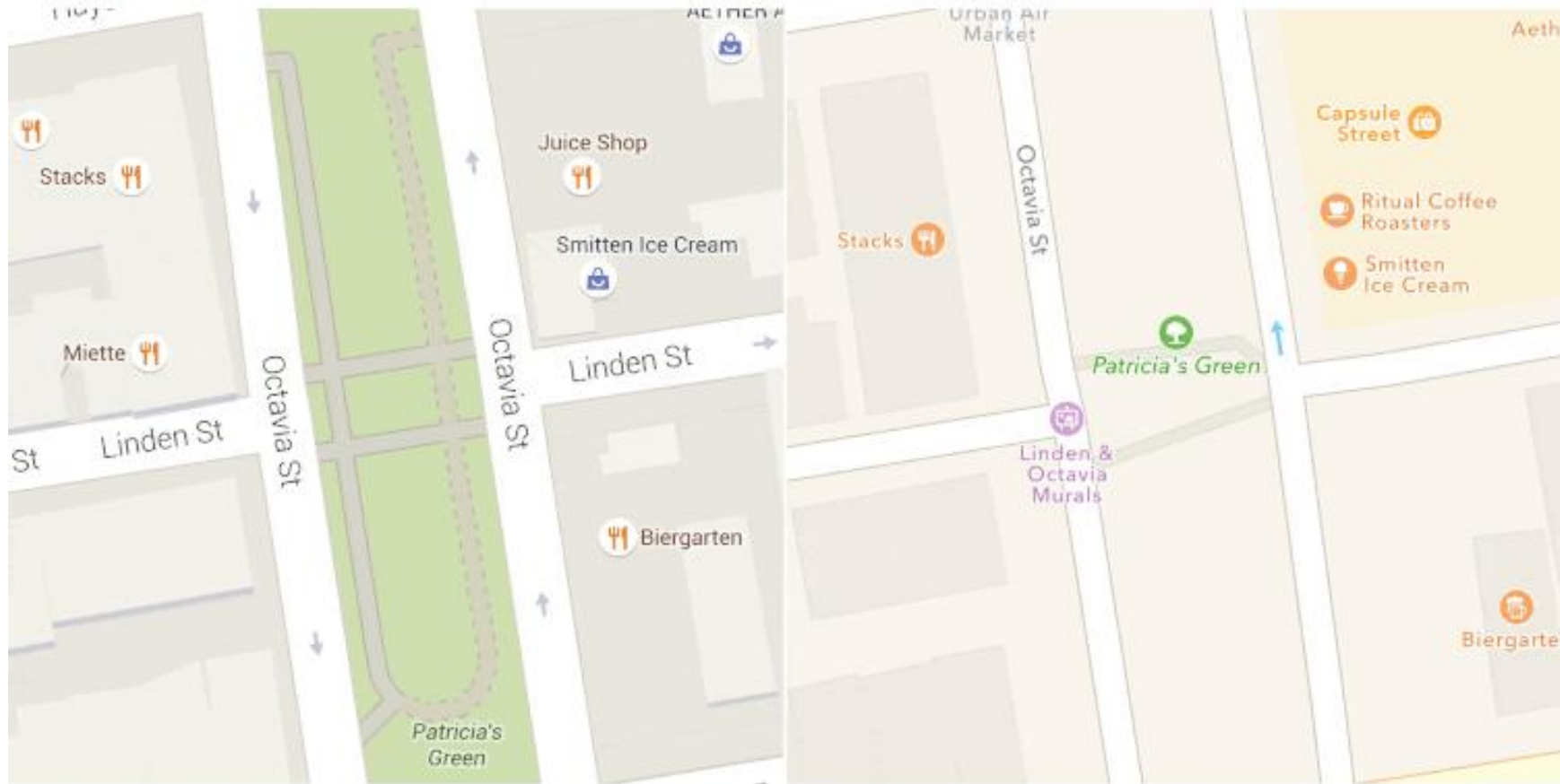


CMO'S INCREASINGLY "UNSTABLE" IN C-SUITE



COMPLEXITY FOR MARKETERS INCREASES WHEN ATTENTION INTERSECTS WITH UTILITY

2016 MAY 2016 JUNE 2016 JULY 2016 AUG 2016 SEP 2016 OCT 2016 NOV 2016 DEC 2017 JAN 2017 FEB 2017 MAR 2017 APR 2017 MAY



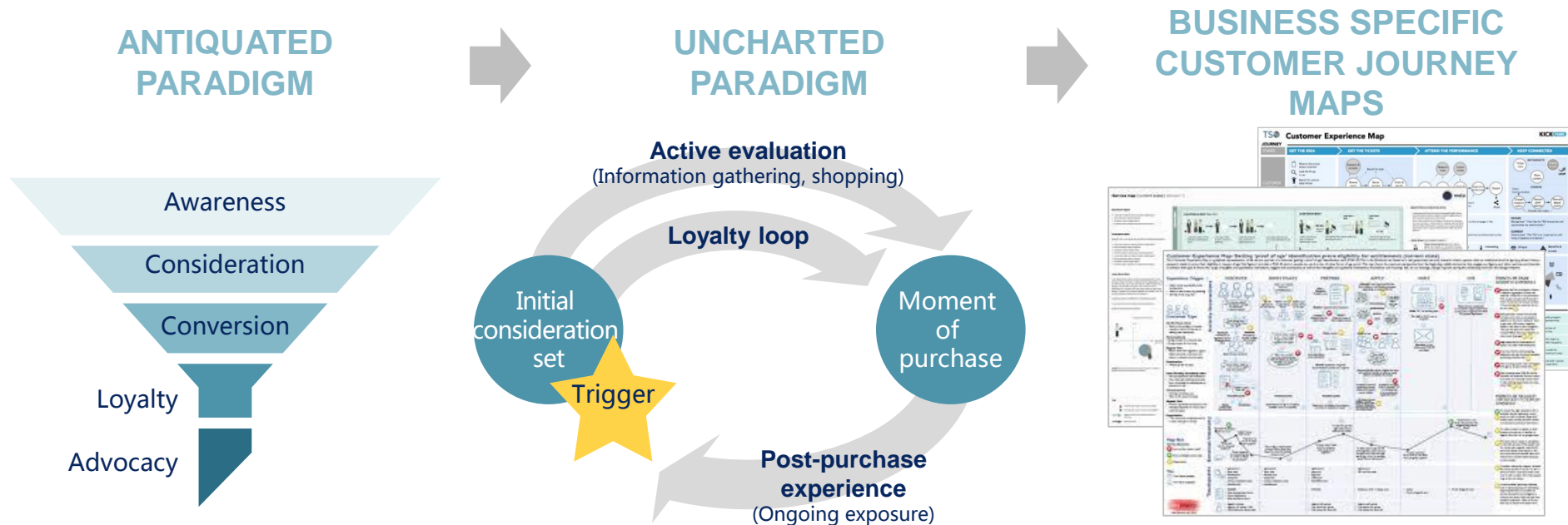
GOOGLE MAPS

APPLE MAPS



HOW HAVE MARKETERS REACTED: COMPLEXITY HAS BRED COMPLEXITY

The traditional marketing funnel lost its efficacy; Create individualized databases about customers, and mapping and grouping specific journeys



SO WHAT?



THE “DUOPOLY” IS REMINISCENT OF THE EARLY 2000s “AGE OF THE PORTAL”

AOL Time Warner

PROPERTY	REVENUE (2002)
AOL	\$9,094
Cable	7,035
Filmed	10,040
Networks	7,655
Music	4,205
Publishing	5,422



PROPERTY	REVENUE (2002)
MSN	\$1,571
Client	9,360
Server Platforms	6,157
Information Worker	8,212
Home and Entertainment	2,453
Business Solutions	308
Mobile and Embedded Devices	112



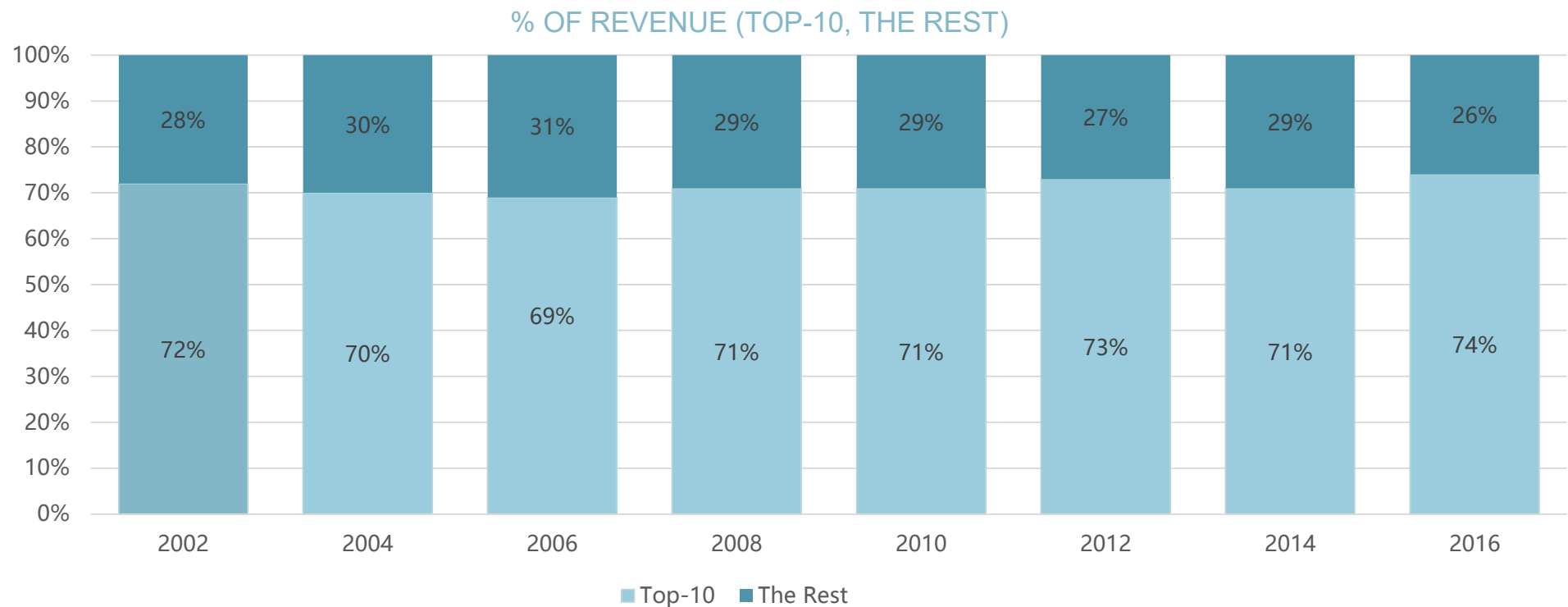
PROPERTY	REVENUE (2002)
Marketing Services	\$651
Fees	208
Listings	93



REVENUE CONCENTRATION IS A CONSTANT IN DIGITAL ADVERTISING

"The big point is that if Google and Facebook are the primary interfaces to buyers, over the long-run they own the relationships and the related data. every partner they work with is subservient."

– Brian Wieser, Pivotal Research Group



THE \$10 BILLION QUESTION...

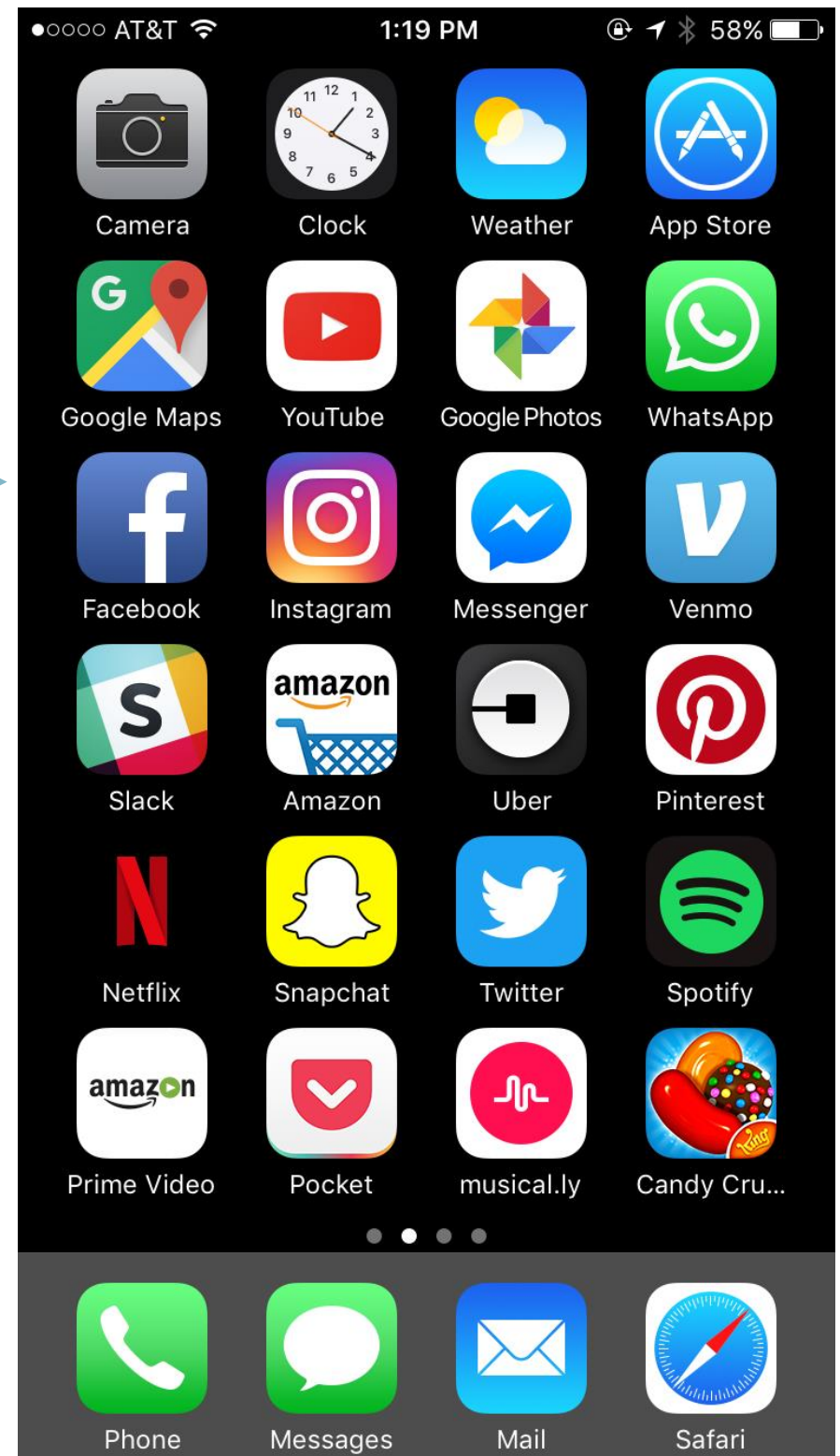
HAVE YOU EARNED A PLACE ON THE HOMESCREEN?



28 Homescreen Apps



12 VHF Channels



Which personality type is choosing which flavor?



14%
of you are
NEUROTIC



No. of macarons munched

140



Macarons nibbled

Egg whites whisked
27

Least common personality type
AGREEABLE



11%
of you are
AGREEABLE

- Layer
- Black
- Pink

Find **YOUR** flavor

WGSN

WGSN



Methodology & process

Society

Technology

Environment

Politics

Industry

Creativity

Research
and analyze drivers

Identify
and connect the trends

Challenge
assumptions

Verify
global relevance

Map
the trend trajectory

Deliver
conclusions & solutions

So how do we do it?

Using qualitative and quantitative research, our global teams analyze various data sets, research papers, economic forecasts, consumption habits and white papers. These findings are layered with consumer interviews, visual aides, regional style drivers and insight from over 95 countries.



Proprietary Research

Catwalk shows,
festivals, tradeshows,
street-shots, urban
exploration



WGSN image bank:
1.5m images tagged
yearly, with an archive
of over 30m images



Expert analysis
(WGSN's forecasters,
product designers,
journalists, data
scientists and analysts)



WGSN data sources:
Instock and Barometer



Consumer interviews
and focus groups



Secondary Research

Research papers
(Harvard Business Review, MIT, Oxford, Stanford, Cambridge etc.,)



Economic forecasts
(European Commission, OECD, PWC, IMF, World Economic Forum, United Nation, World Bank)



Annual CSR and sustainability



White papers (IBM, Deloitte, Gartner, Accenture, Ipsos Mori, Edelman, Episerve, Mintel, Pew Research)



Regional Census Information



Financial institution annual spending reports

Global Glance

USA

>50% of those under 18 will be minorities by 2020

France

5G by 2020, \$250bn – projected sales made on mobile devices

UK

Over 1 million British youth have registered to vote in the General Election since Brexit

Mexico

54 million Mexicans increased their local activism

Italy

172% ↑ in multi-ethnic marriages since 2000

India

Uber's second biggest market

China

4x increase in donations to NGOs in China

Brazil

200% growth in AirBnB

Australia

\$3 trillion estimated global economic growth from 5G wireless technology



Future Consumer 2020

WGSN

Create
Tomorrow



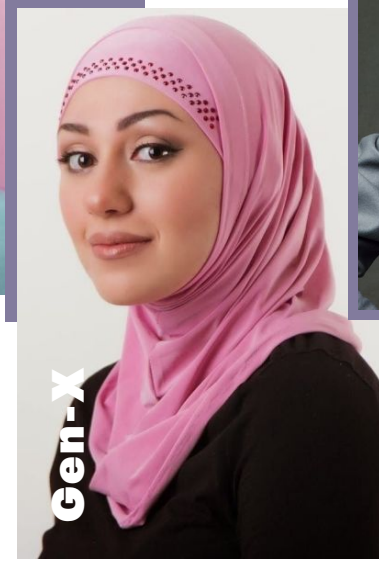
Alpha



Gen-Z



Millennials



Gen-X



Boomers

New
Consumer
Voices



Generation M Muslim Millennials

Projected to spend
\$327bn on apparel
by 2019

Travel expenditure
estimated to reach
\$300bn by 2026



Projected to be a
quarter of the world's
population (2.8 billion)
by 2050

Larger than the current
combined clothing
markets of the UK
(\$107bn), Germany
(\$99bn) and India
(\$96bn)

Beauty spend is
projected to reach
\$213bn by 2021

The untapped
market:
Quinceañera



● The Quinceañera:
a Hispanic sweet
15 party

● Event prices range
from \$15,000 to
\$80,000



● Poised to be a
"billion dollar"
industry

M-Commerce Dominates



Crowd-based Capitalism



New Consumer Voices

M-Commerce Dominates

Crowd-based Capitalism



Analogue Activism



Localists



Anti Anxiety



The Imperfectionists



Responsible Tech



The Augmentalists

Analogue Activism

- By 2020 Local activism will be the norm, evolving out of The Activism Age
- In the US, Lack of millennial Local participation resulted in a median age of 60 for mayoral elections in 2016
- Pre- Brexit, Youth turnout in the uk’s local and eu elections had been less than 20%—among the lowest in the eu
- Over 1 million British youth have registered to vote in general elections since Brexit



"You can't feel a cause on a smartphone but you can feel it on the streets. The streets are our new social media feed."



Localvists

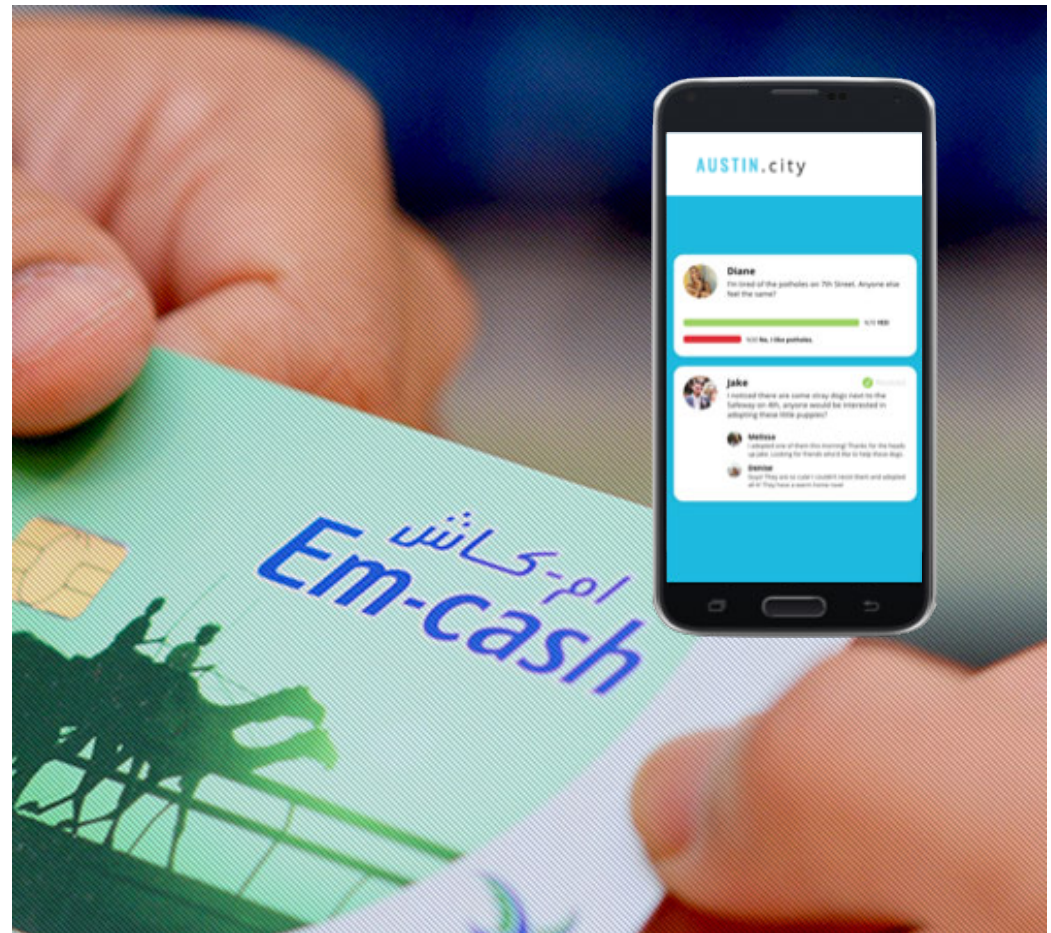


Rules of Engagement

- **Context over content:** companies need to make a true commitment to local communities
- **The local crypto economy:** trialling new payment and finance plans at a local level
- **Wealth care:** Price discounts and bundles don't add values—company values do



The Local Crypto Economy



Wealth Care





Key Takeaways

01 5G Network

The 5G network will create seamless connectivity and drive record m-commerce sales. Companies need to factor in speed and payment optimisation to compete in 2020.

02 New Majorities

There are considerable white space opportunities around event-based design and drops to drive market share.

03 Embedded Values

It's about mattering to people. How companies embed their values into the value chain will be the difference between growth and stagnation in 2020.

04 Local Crypto

As more cities invest in local crypto currencies, brands and retailers need to think about strategic partnerships and/or new payment options to hold market share.



Thank You

WGSN