

TURNING HEADWINDS INTO TAILWINDS TO ADD BUSINESS VALUE



havas

ProcureCon
MARKETING



IN A TIME OF GLOBAL DISRUPTION, WE ARE ALL FACING HEADWINDS

BUT ARE THEY TAILWINDS



Supply Chain Chaos, Surging Costs Set to Plague Europe's Profits

- Inflation pressures are key risk as companies begin to report
- The bar is high for firms that got a boost during lockdowns



Energy Crisis Drives Metals to Multi-Year High

Daily News
Adding to the cost of living crisis

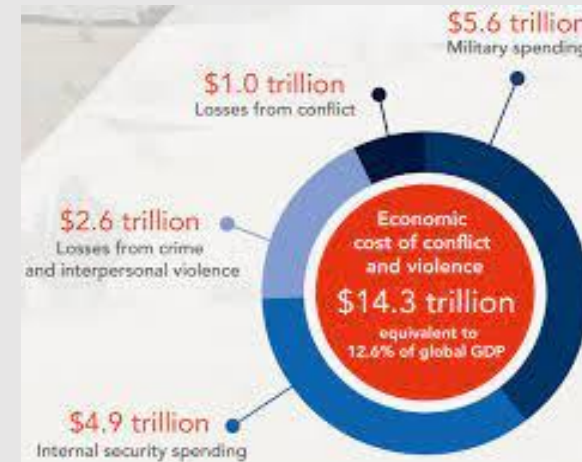
THE COST OF LIVING CRISIS

WE CAN'T PAY

Big rise in energy costs expected for millions

PROTEST SAT 12 FEB 1PM

GEORGE SQUARE GLASGOW



추가대출이 필요한 직장인이라면
개인신용대출 직장인중금리대출

최저연 최고연
4.97% ~ 10.27%

Global inflation rates have risen since 2020

Selected countries, September 2022



Note: Countries measure inflation differently, so rates may not be directly comparable.

Source: Bloomberg

Financial

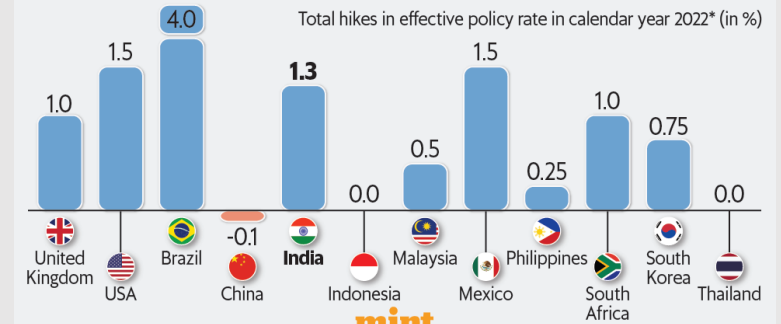
Lack of staff raising prices and hurting businesses, survey says

Katherine Blackwood

More than one-third of businesses in the survey said they had also cut down on the kinds of products and services on offer, with a further one-third saying they had lost staff.

At a rapid speed

The RBI's cumulative hikes of 130bps in the effective policy rate in past three months is the fastest and highest among Asian peers.



*Data as of 8 July 2022

Source: Various National Sources, CEIC, Motilal Oswal Financial Services

**CHANGE FORCES US TO
RETHINK OUR APPROACH
TO MARKETING VALUE**

**AND TO REASSESS
WHERE WE
COLLECTIVELY FOCUS**

Source: Havas | MB Special Report (YouGov) | June 2022

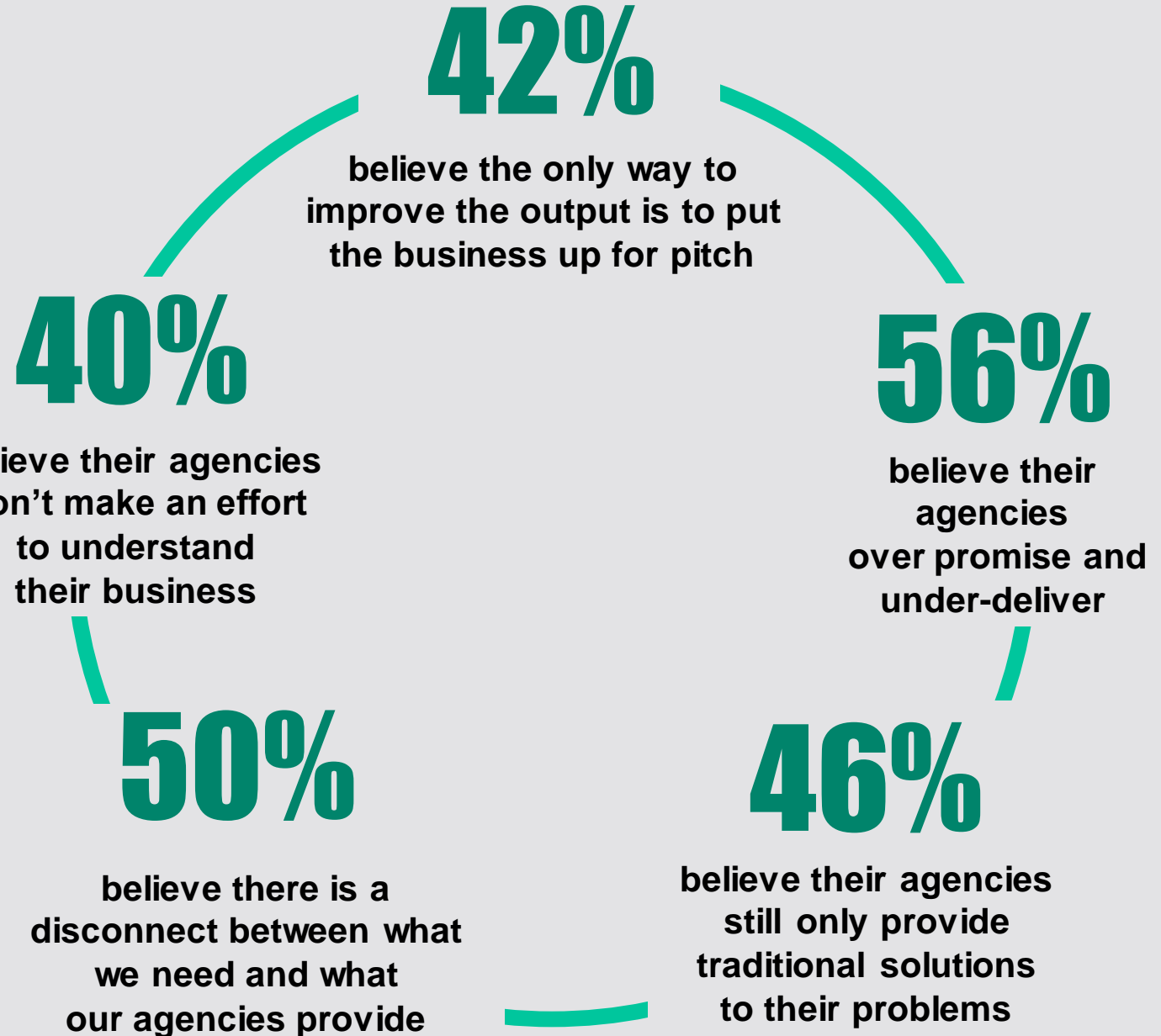
OUR MEANINGFUL BRANDS SPECIAL REPORT INTO CLIENT/AGENCY RELATIONSHIPS GAVE US CLEAR DIRECTION

We carried out qualitative and quantitative
research with 200+ people across
North America and Europe

Source: Havas | MB Special Report (YouGov) | June 2022

OUR MBI RESEARCH TELLS US

YOU WANT SOMETHING DIFFERENT



Frédéric de Courtois - 1er International Insurance Executive
7 mois • 0

Way to the Future

Digital transformation is about people more than technology: without the right skills, digital and technical innovation may be ineffective. At Generali, we nurture our people's professional development, through upskilling programmes...

307 • 2 commentaires

LesEchos

Crise du Covid : une double transformation digitale et durable comme voie de sortie

Accélérer leur transition numérique et écologique devrait permettre aux entreprises européennes de se remettre plus rapidement de la crise sanitaire et économique, selon une étude d'Accenture.



Innovation culture fuelling business resilience in India: Study

Indian companies are aiming at increasing their revenue from digital products and services to 50 per cent in the next three years from 36 per cent at present

IANIS • November 25, 2020, 15:01 IST

Amid the pandemic, 77 per cent of Indian organisations have found innovation to be critical or important to their performance and resilience, said a Microsoft and IDC report



NEW YORK TIMES Bestseller

**NO RULES
RULES
NETFLIX
and the
Culture of
Reinvention
REED
HASTINGS
ERIN
MEYER**

The Most Innovative Companies of 2022

01 Stripe
02 Solugen
03 Twilio
04 BluePower
05 Clouda Tree

10 Hugely Successful Companies that Reinvented Their Business

For some companies, it can pay off massively to pivot away from your core business and focus on something new. Here are 10 examples of companies that successfully reinvented their business.

Deliver Better Value To Your Customers Through Business Transformation

BY IBMVOICE
4 min read
PUBLISHED: Dec 18, 2017 07:01:34 AM IST
UPDATED: Jan 28, 2020 02:33:27 PM IST



**IN A TIME WHEN TRANSFORMATION
IS THE CORPORATE ZEITGEIST**

9 Disruptive Business Models	
Freemium Model	Especially for low marginal cost products. Offer a free version that is not perfectly satisfying but already is attractive for customers and try to upsell with more services.
Subscription Model	It aims to bind a customer for a long term by splitting the offered service into a monthly recurring payment. Well known from Netflix.
Free Offerings	Google and Facebook are the best examples. For the user it is completely free to use and the company is trying to generate revenues based on other factors like advertising.
Marketplace Model	One- or two-sided marketplaces are a very popular internet business model. Either the market place sells a set variety of products (e.g. Product Wabshops) or it offers a two sided platform like Amazon Partner or Ebay.
Sharing Economy / Access-over-Ownership	Selling limited access-over-ownership rights got famous and popular with Airbnb. It can be used to share goods which are physical assets (houses, cars, etc.) but also intangible assets (software, licenses, etc.)
User Experience Premium	One trend that can be observed with brands like Apple, Tesla, etc., which focuses on realizing higher prices by offering better user experiences.
Pyramid Model	On the internet there are a lot of pyramid models, which mostly are built around affiliate systems. Dropbox, Amazon Affiliate and also Microsoft use this model often.
(Digital) Ecosystem	The most successful business model of our time currently. It locks the customer into a own ecosystem of services and offerings so he does not need to leave. Companies earn along multiple points in the customer journey - Example for this would be Amazon or Alibaba.
On-demand Model	Uber, Cloud Computing or even Services can be bought on demand. This way a "premium access" over time and resources can be monetized according to customer needs.

© Benjamin Tahn

MoreThanDigital

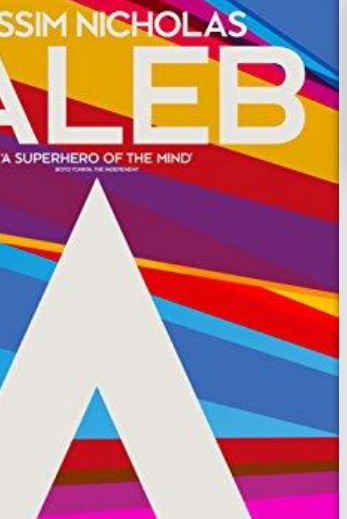
THE ECONOMIC TIMES News

View: India's consumer market, a \$1 trillion investment opportunity

View: Global Cases / Cross Border / Five Indian companies whose mantra is innovation

Five Indian companies make it to the list of The World's Most Innovative Companies, which includes 100 names from across sectors and countries

BY FORBES INDIA



Guy Flament • 1er Yves Rocher Global CEO
3 j • 0

Merci [stephane soumier](#) et [Augustin van Rijckevorsel](#) pour ce débat passionnant sur [B SMART](#) à propos de la stratégie de [Yves Rocher](#) et du [Groupe Rocher](#) afin de relever les défis de notre époque : client au coeur, transformation digitale, et responsabilité environnementale et sociale

Do you have the feeling that business transformations will accelerate?

36% 64%

Oui Non

THE ECONOMIC TIMES | Rise

English Edition • Today's Paper

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all Biz • Startups • Startup India: Transformation in the entrepreneurial mindset

Startup India: Transformation in the entrepreneurial mindset

Wednesday, Oct 05, 2022

Outlook

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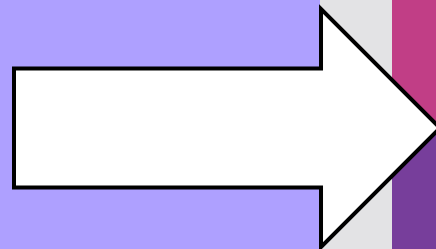
HOME » OUTLOOK SPOTLIGHT

OUTLOOK FOR BRANDS

How Did Covid Accelerated Digital Transformation in India?

As the world is considering ways to reduce the disruption caused to humanity, now is an excellent opportunity to concentrate on digital transformation by recognizing its necessities.

THERE IS AN INCREASING DEMAND FOR DELIVERING MEASURABLE CHANGE



Q15_RC. You say that each of the following areas are very important for your role currently.

Which would you say is MOST important? Select one only.

Managing company culture and talent

6%

Committing to new MarTech operations

8%

Driving brand guardianship/stewardship

9%

Driving business and sales performance

30%

Innovative and future-focused solutions,
data and technology

31%

AGENCIES NEED TO THINK DIFFERENTLY

46%

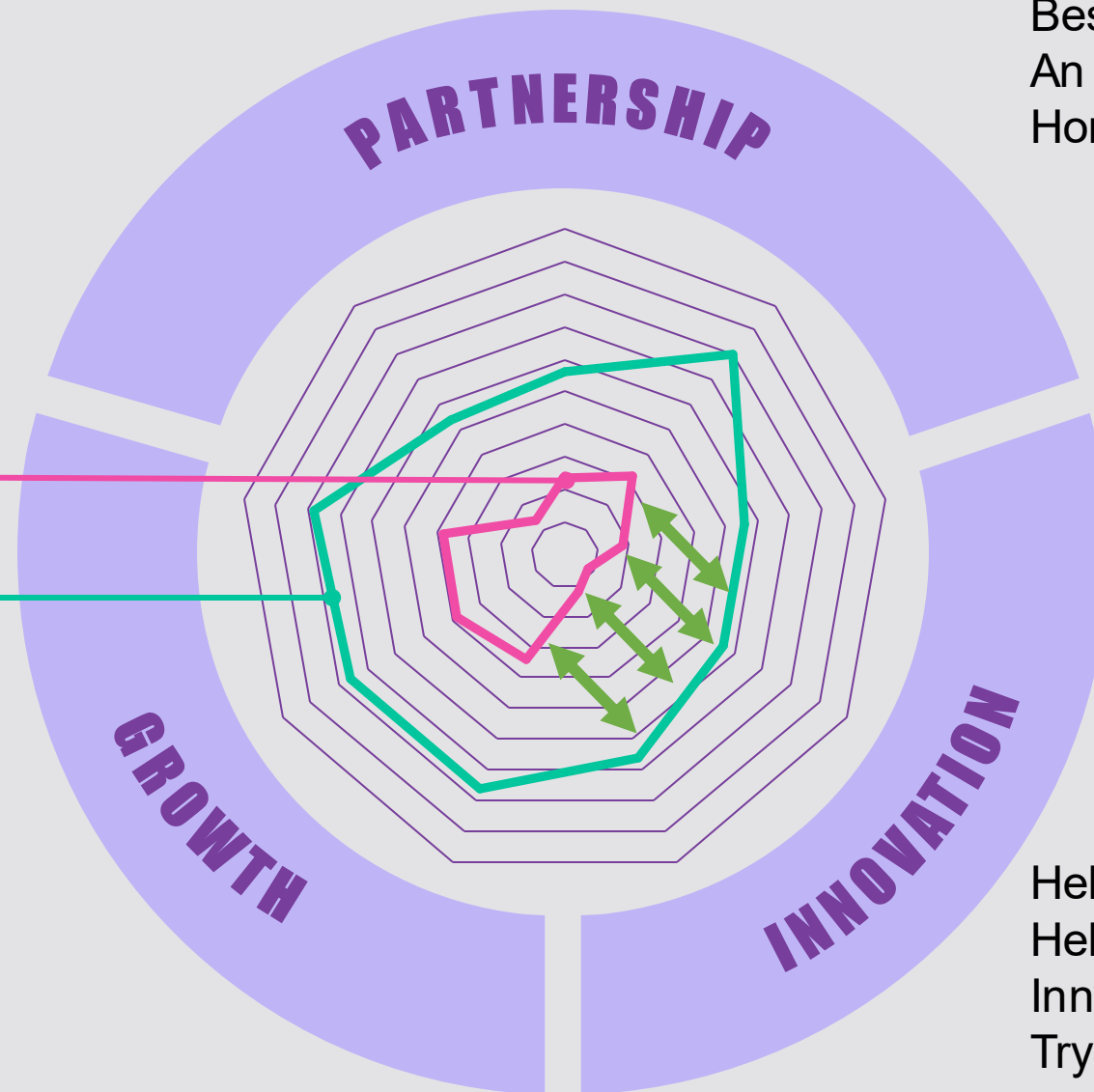
**of C-suite believe agencies
still only provide traditional
solutions to our problems**

YOU TOLD US CLEARLY WHAT YOU WANT AGENCIES TO DO

SATISFIED ●

IMPORTANT ●

Understands our business
Understands our customers
Reveal value for money
Efficient model



Best talent
An extension of my team
Honest and transparent

Helps me learn new skills
Helps me prepare for change
Innovate for the right reasons
Try new approaches

FOCUS ON WHERE THERE IS THE BIGGEST OPPORTUNITY TO **BUILD UP AND OUT**



What we do

**TALENT
& SCOPE**



Where we impact

**ETHICS
& SUSTAINABILITY**



How we measure

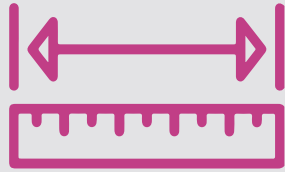
**DATA
& TECH**

What we do

TALENT & SCOPE

A FOCUS ON RESHAPING STRUCTURES

CHANGING OUR APPROACH TO TALENT

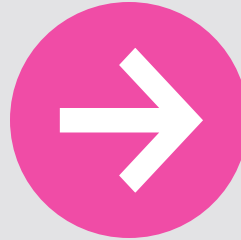


FROM JUST MEASUREMENT:

FTEs

Scope of work

Org structure



TO ADDING VALUE:

Star talent retention

Adaptive services for clients' future needs

Bespoke brand solutions

Village op model

EVERY CLIENT IS LOOKING FOR **NEW MODELS**

HEADWINDS

Innovation

Differentiation

Competitive advantage

Output neutrality

TAILWINDS

Channel complexity

Lack of (long term) scope visibility

Need for agile talent

Maximising budget/
MROI improvement

A POWERFUL COMBINATION

OPERATING MODEL

FTEs

Scope of work

Org structure



COMMERCIAL MODEL

Star talent retention

Adaptive services for clients' future needs

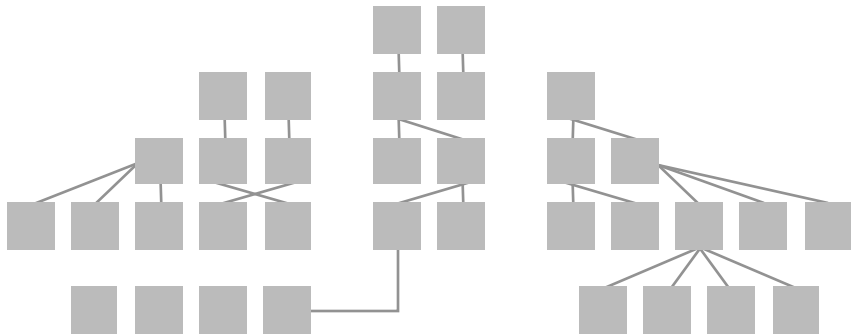
Bespoke brand solutions

Village op model

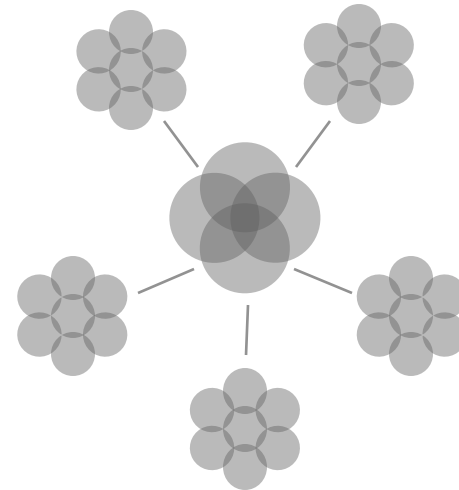
CLIENT SPECIFIC
INNOVATIVE
AGILE
ADAPTIVE

FROM FIXED AND RIGID SCOPE BASED TO HYBRID CORE AND AGILE OUTPUT BASED MODELS

Less like this



More like this



**Shifting effort from internal management
and delivering the right solution on time**

FLEXED GLOBALLY TO DRIVE MORE EFFECTIVE RESULTS

MODEL

KEY SERVICES

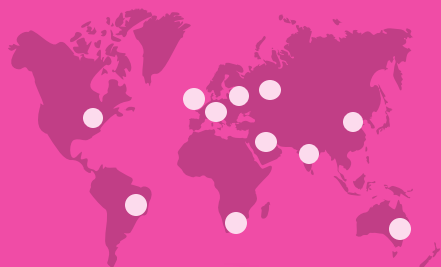
GEOGRAPHY

CLIENT

Decentralised

Regional lead
based on brands

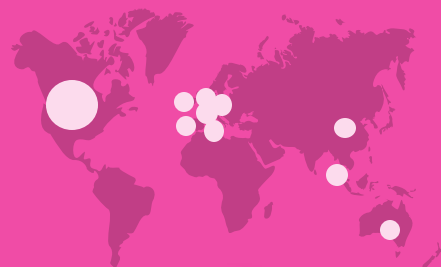
Advertising
Branding
Content Production
Digital
Partnership & Activation



Centralised

Led by global hub
in the US

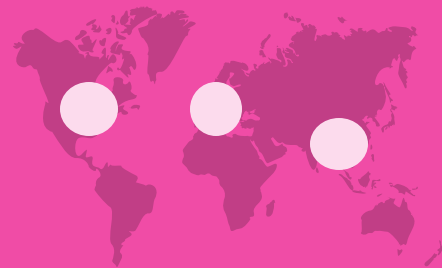
Branding
Content Production
Digital
Experiential
PR



Global Hubs

Strong global axis between
US/UK/Singapore

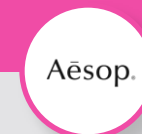
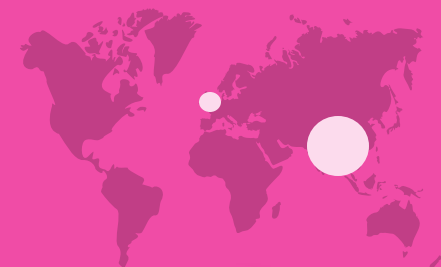
Advertising
Content Production
Comms
Social
Partnership & Activation



Centralised

Led by global hub in China,
supported by London

Branding
Customer Experience
Data
Loyalty
Tech Integration



Where we impact

ETHICS & SUSTAINABILITY

**THE SHIFT TO (MEASURABLE)
CORPORATE CITIZENSHIP**

**WE NEED
TO MAKE
ESG++**

**THE
GROWTH
STRATEGY**

79%

**of C-suite believe
ESG will create more
resilient businesses**

**“ I think it’s important to
underscore how seismic this
is: sustainability and ESG-
led businesses are literally ”
the future**

Sam Hornsby, CEO TRIPTK

h

88%

of consumers would switch from a brand they're loyal to if there's a sustainable alternative

x

95%

of consumers see sustainability as something they want to do, not just need to do

x

CONSUMER DEMAND IS ALREADY THERE

x

86%

of C-suite leaders believe there is a shift taking place in their industry, away from serving shareholders and customers to considering a broader group of ESG stakeholders

90%

of C-suite leaders say customer demands for ESG action is now at a critical stage

x

h

70%

say they lack the capacity needed to deliver the direction ESG principles require

x

60%

of businesses have ESG plans, but only...

x **WE NEED TO TURN ESG INTO COMMERCIAL STRATEGY** x

65%

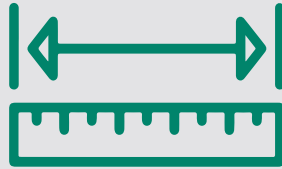
express the need for education across the board and C-suite

12%

of C-suite leaders expect to stick with today's plan

x

AGENCIES HAVE TO **MATCH VALUES** TO CHOICES



FROM JUST MEASUREMENT:

Sustainability as a cost
Siloed ESG activity



TO ADDING VALUE:

Sustainable growth
Systemic ESG solutions

AN ETHICAL MARKETING PRACTICE NEEDS SIMPLE PRINCIPLES



DO NO HARM

The ethics of
compliance



TRY TO DO GOOD

The ethics of
achievement

**WE LED THE INDUSTRY IN 2021
AND WILL CONTINUE IN 2022**

BE RADICAL AGENTS OF CHANGE



DO NO HARM

The ethics of
compliance



TRY TO DO GOOD

The ethics of
achievement



AD NET ZERO
ALL FOR NONE

ecoact
an atos company



Scope3

SIMPLE PRINCIPLES GUIDE

DETAILED BRAND FRAMEWORKS

**Audit
advertising
supply chain**

**Understand
opportunities
for change**

**New approaches
where needed**

DO NO HARM

TRY TO DO GOOD

VALUES DRIVE VALUE

Implementing our inclusive advertising framework to support LGBTQ+ and Minority Creators

>10% increase
in campaign reach

Implementing the AdNetZero action plan, measuring emissions and impact

71% reduction
in carbon emissions from digital ads supply chain

Putting applied ethical principles at the heart of our business

700 staff
globally are Certified Ethical Advertising Executives

AND DELIVER MEASURABLE BRAND GROWTH

DIVERSITY & INCLUSION: ADIDAS LIQUID BILLBOARD



70% sell-out in 4 weeks,
+175% of target

SOCIAL INVESTMENT: SANOFI COMEBAQ COURTS



+11.5% sales Y.O.Y

SUSTAINABILITY: CARREFOUR ACT FOR FOOD

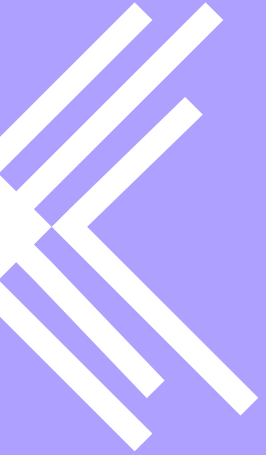


90% believe brands with
responsible food production

Where we impact

DATA & TECH

UNDERSTANDING THE WHOLE CUSTOMER



**MEASURING MARKETING AND
BUSINESS VALUE IS
INCREASINGLY CHALLENGING**

SIMPLE PRINCIPLES GUIDE

DETAILED BRAND FRAMEWORKS

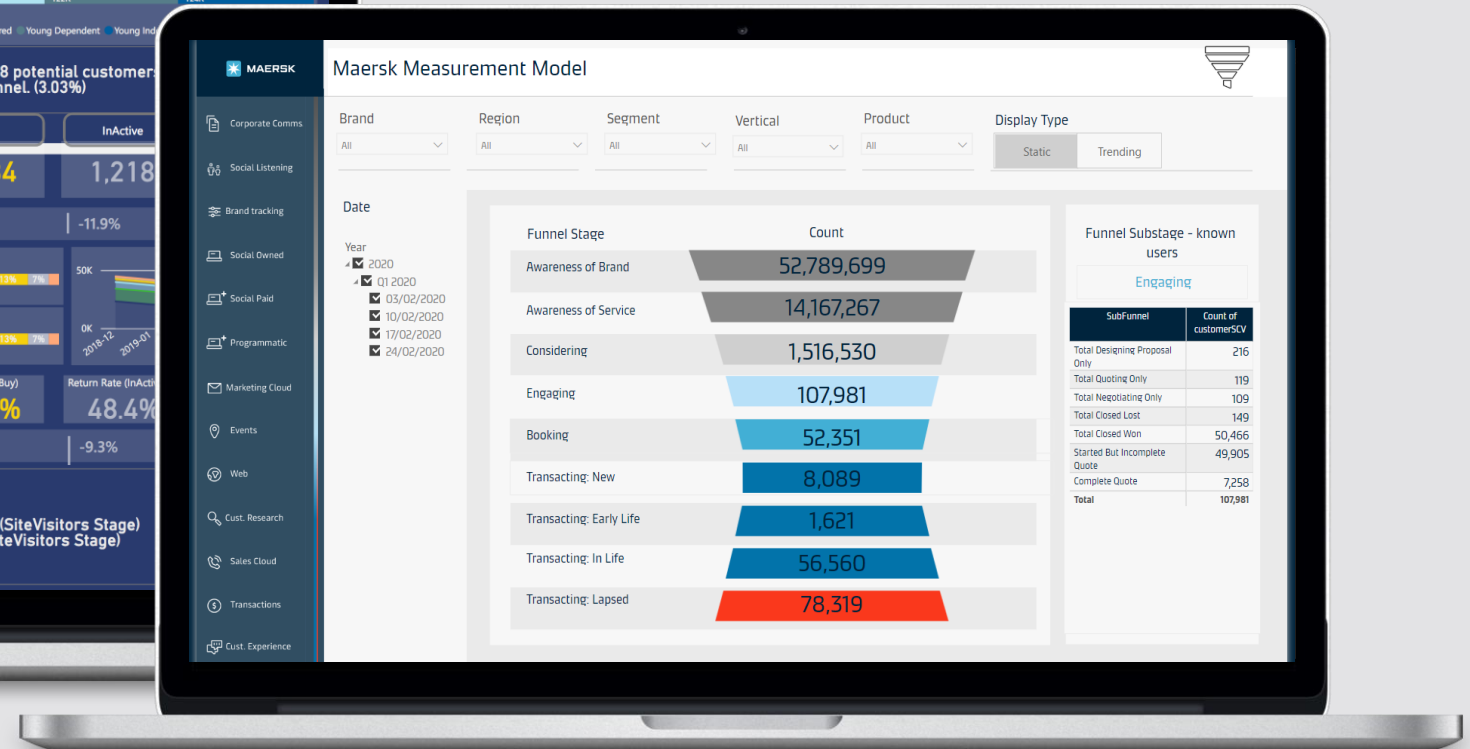
**We define
what marketing
value means
to you**

**We design
the key
performance
indicators
needed to
measure value**

**We set targets
and industry
benchmarks**



DELIVERING A MEASUREMENT FRAMEWORK



INTERPRETED BY A TEAM OF PERFORMANCE EXPERTS



FROM JUST REPORTING:

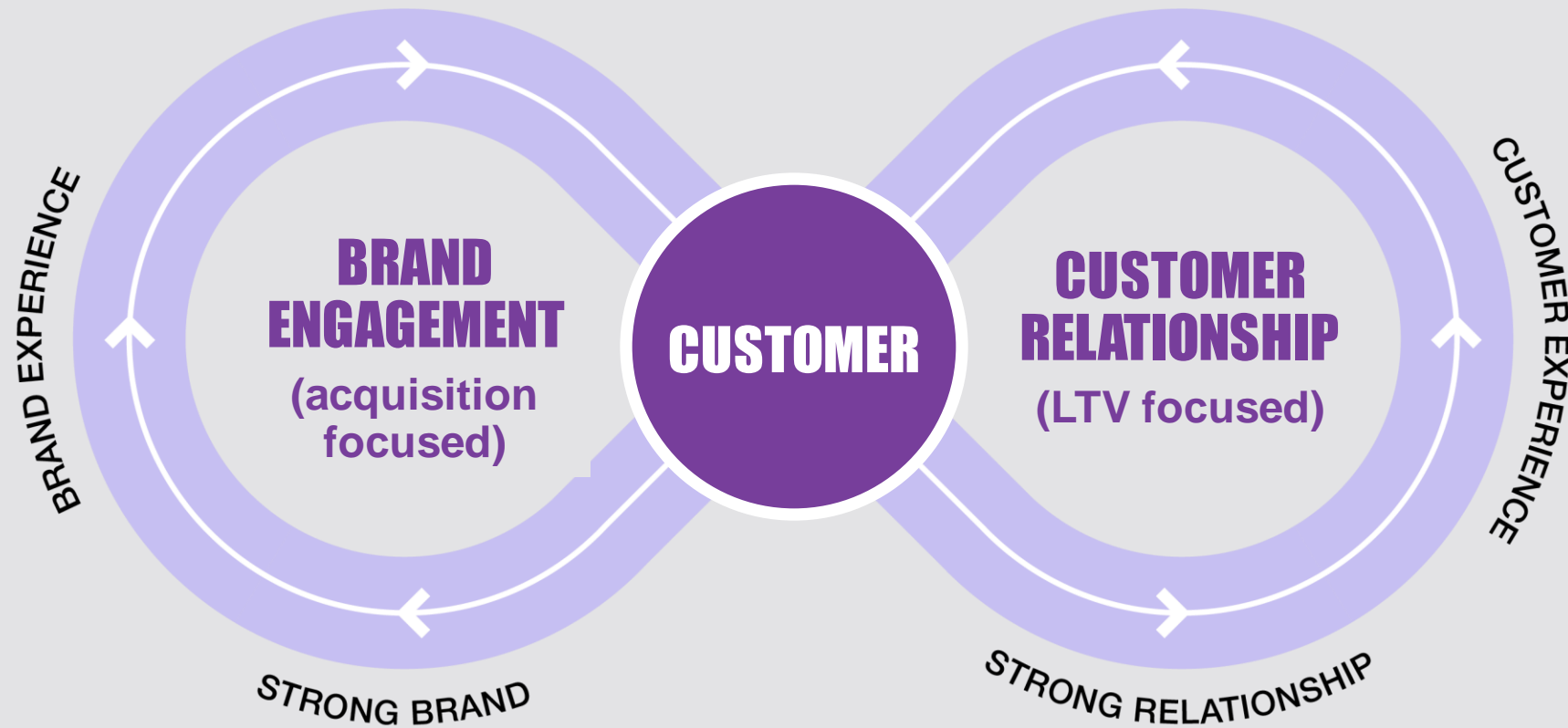
- Acquisition
- Reach and broadcast
- Share of market
- Data costs
- Tech systems



TO ADDING VALUE:

- Life-time value
- Incrementality
- % High value customers
- R.O.I.
- Tech application

DELIVERING THROUGH OUR **UNIQUE** **APPROACH**





LET'S DISCUSS