



# WPP Investor Day

Salmon - June 2013



Unique Approach - Unique Solutions

**2012: 6%**

Of total US retail sales are Ecommerce (\$225b)

**2016: CAGR 14% for total sales of \$434 billion**

Another **10%** of offline sales are influenced by visiting retailers website

**Consumers who perform ROPO spend twice as much per trip**  
(Research online, purchase offline)



**Digital Influence**

One of the hottest trends in Social Media

**92% of consumers trust those they personally know**  
**70% of consumers trust online consumer reviews**

**Europe:**

Largest ecommerce market worldwide

**19% growth to \$307 billion passing North America (2012)**

Sources:

Emarketer 2013

SAS and Verdict Research, "How the UK will shop in 2013"

Google Online2Store Studies with Auchan, Carrefour, PC City

Google Online2Store Studies with FNAC, Goertz

Econsultancy 2013, Neilsen April 2012. Google Zero

IMRG 2013

European Multi-channel and Online Trade Association

**£2,268**

Largest Per capita spend globally on Ecommerce (2012)

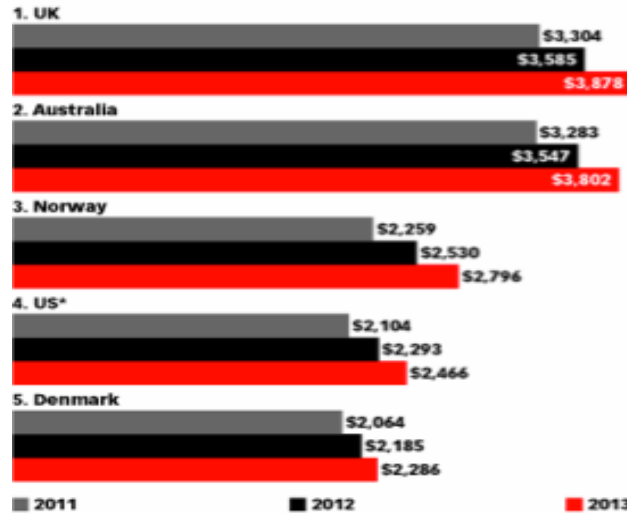
**Maturing Online Grocery Market Globally**

**1/5**

Of UK households buy Groceries online each Month (approx.)

By **2016** UK Will have Western Europe's highest Smart Phone Adoption (78%)

**Top 5 Countries, Ranked by Average B2C Ecommerce Sales per Digital Buyer, 2011-2013**



Note: includes travel, digital downloads and event tickets purchased via any digital channel (including online, mobile and tablet); excludes gambling; ranked by 2013 figures; \*excludes event tickets  
Source: eMarketer, Jan 2013

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www.emarketer.com



**eCommerce  
Digital  
Agency**

eCommerce and multi channel experts  
Operations in London, Beijing, Sydney  
c. 400 staff  
Strong delivery-focused culture

**Experience**

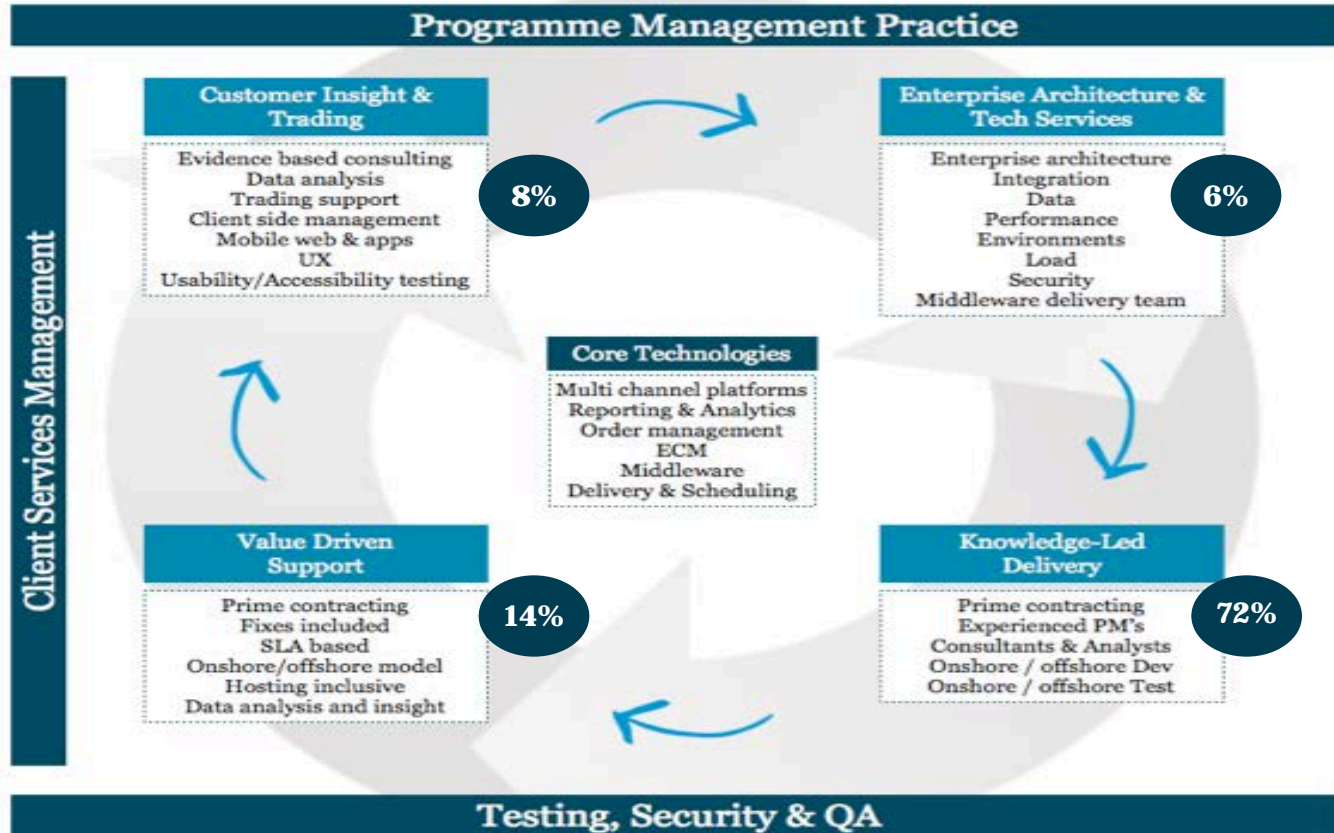
Large-scale eCommerce for grocery and non-food retail, FMCG and wholesale  
Delivery and support of high-volume B2C & B2B eCommerce sites  
£3 billion revenue through Salmon supported sites each year  
Multi-channel, multi-country, multi-device and multi-brand systems

**Expertise**

Europe's largest IBM WebSphere Commerce services business  
Wide range of skills in 3<sup>rd</sup> party software:  
> Oracle, Omniture, Autonomy etc  
Long term relationships with customers  
Shared risk – fixed price or outcome-based commercial models

# eCommerce | Salmon Clients





# eCommerce | Salmon supports Argos's transformation into a multi-channel pioneer

## Background

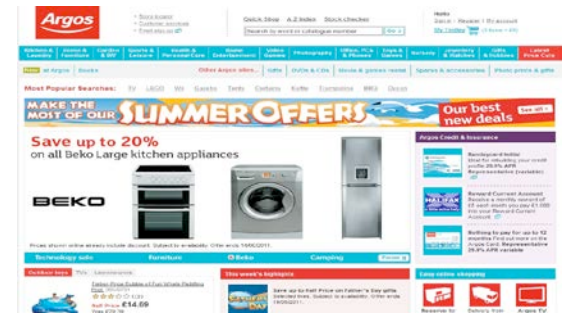
- Argos is the UK's 2<sup>nd</sup> most visited online retailer (430 million site visits)
- Salmon has been supporting the growth of Argos' multi-channel revenues since 2002

## Transformations delivered by Salmon

- Replatformed [www.argos.co.uk](http://www.argos.co.uk) to WCS including 'Click and Collect'
- Multiple enhancements including iPhone, Mobile, Version upgrades
- Salmon protects Argos' multi-channel revenues through provision of ongoing managed application support

## Argos Results

- Argos results: staggering growth in online sales from £121m (2003) to £1.9bn (2012)
- Mobile shopping is now 6% (up from 2% last year)





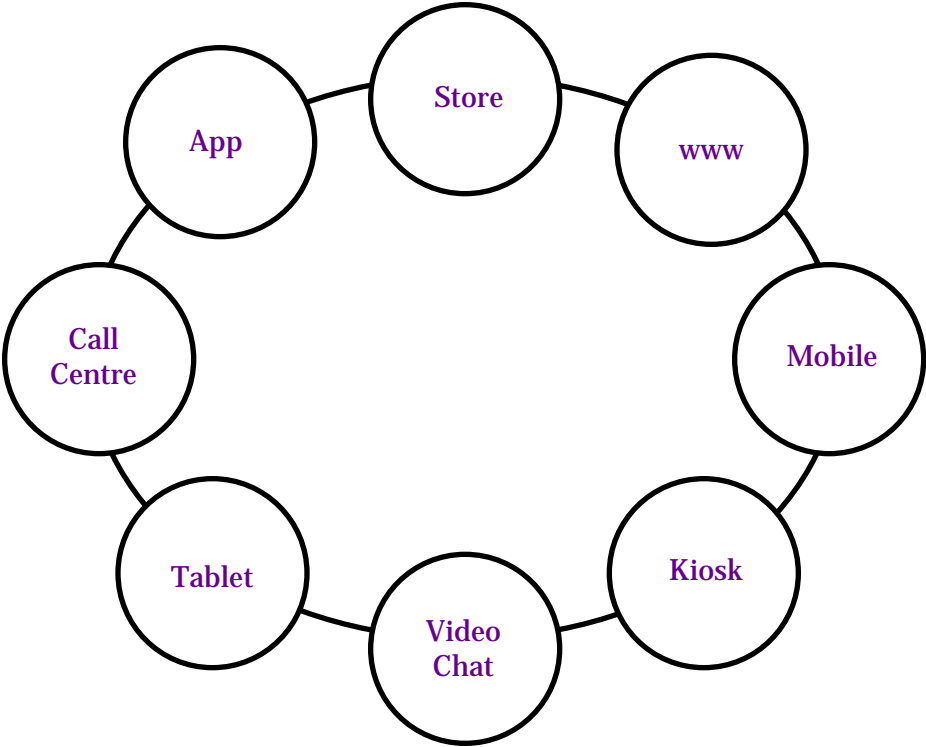
# eCommerce | Cross Channel Experience

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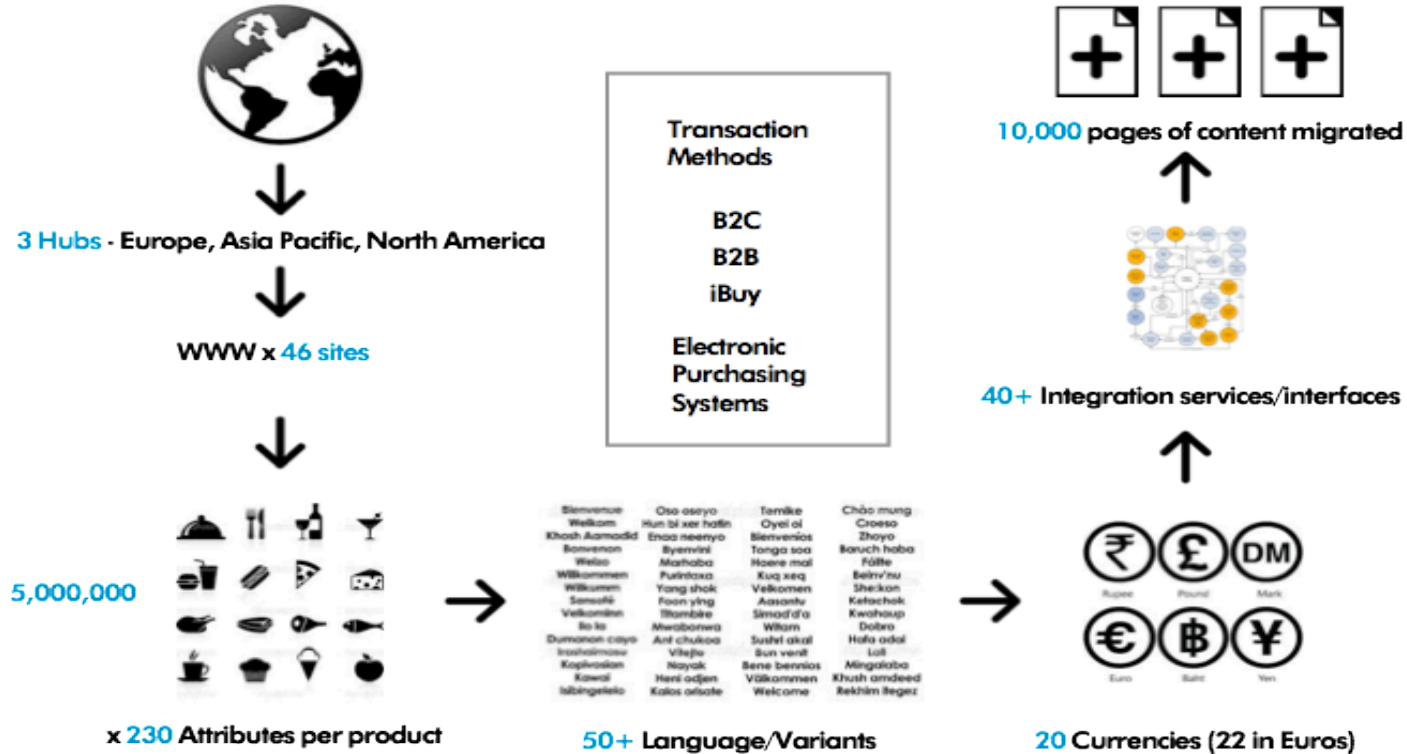
Single  
View of the  
Customer

One system for:  
Web/Mobile  
Tablet/Call Centre  
Store

Track  
Customer  
across  
Research to  
purchase







**eCommerce  
Consultancy  
In FMCG**

**Retailer  
Monitization  
of website  
Real-Estate**

**Under-pin  
WPP  
Platform  
Delivery**

**Geographical  
Expansion**