

A nighttime photograph of a city, likely Cape Town, South Africa, with a large, flat-topped mountain (Table Mountain) in the background. The city lights are visible, and the sky is dark blue. The text 'YOUR ADVANTAGE' is overlaid in large white letters.

YOUR ADVANTAGE

GroupM Investor Briefing
London | November 18, 2015

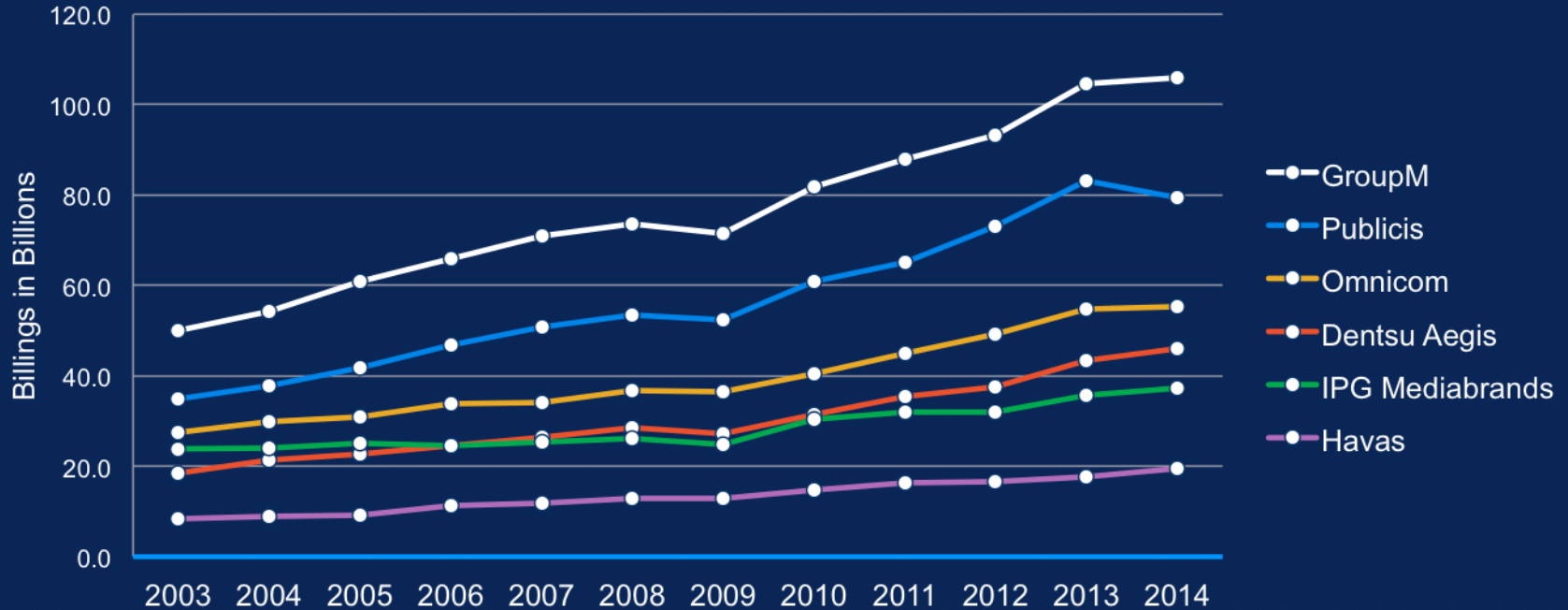
group*m*

PROVIDING ADVANTAGE TO 75 OF THE TOP 100 ADVERTISERS



DELIVERING ADVANTAGE THROUGH SCALE

GLOBAL BILLINGS BY HOLDING COMPANY



DELIVERING ADVANTAGE THROUGH SUCCESS

31%

MARKET SHARE*

33%

SHARE OF QUALITATIVE
RECMA SCORE

40%

INDUSTRY PITCH WINS

SOURCE: RECMA 2014

* Based on Percentage of Global Networks

GLOBAL INTEGRATED SPECIALTY SERVICES

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Motion Content Group



essence.

GroupM Data & Analytics



MINDSHARE



MEDIACOM

MEU

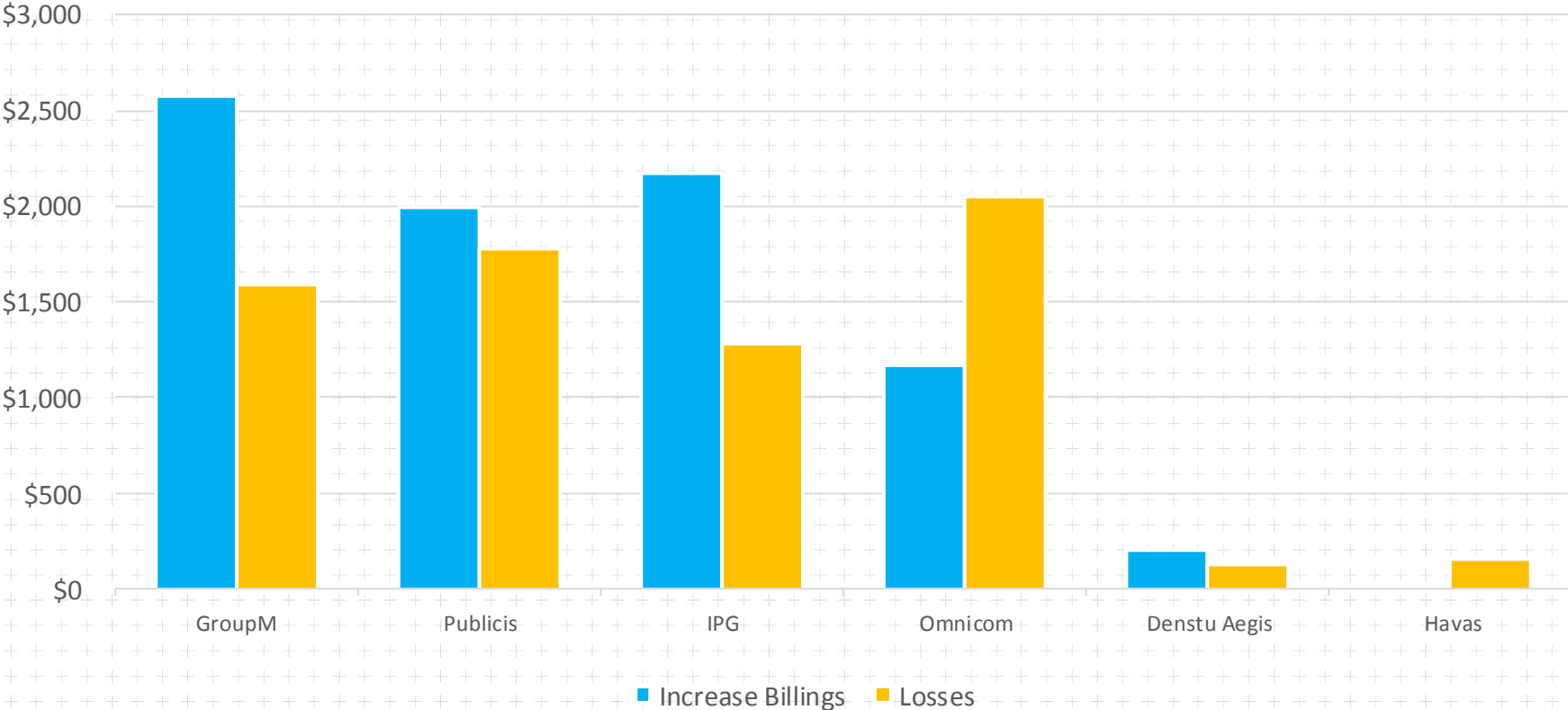
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A nighttime photograph of a city, likely Johannesburg, with a large, flat-topped mountain (Table Mountain) in the background. The city lights are visible, and the sky is dark blue. The text '2015 PITCH ACTIVITY' is overlaid in white, bold, sans-serif font across the center of the image.

2015 PITCH ACTIVITY

ESTIMATED INCREASE IN 2015 MEDIA PITCH BILLINGS VS ESTIMATED LOSSES



*Figures are in Billions
Source: RECMA Wins and Losses- Updated October 21st
Kantar Media



TOP FIVE MEDIA WINS AND LOSSES BY HOLDING COMPANY

HOLDING COMPANY	WINS	LOSSES
	<ul style="list-style-type: none"> • GSK, \$927M • General Mills, \$877M • Tesco, \$192M • Lloyd's Banking Group, \$120M • Huawei, \$120M 	<ul style="list-style-type: none"> • SC Johnson, \$400M • Citibank, \$332M • Johnson & Johnson, \$300M • Unilever, \$111M • Bacardi, \$100M
 PUBLICIS	<ul style="list-style-type: none"> • Kraft Heinz, 637M • COTY, \$435M • Citibank, \$332M • VISA, \$220M • NBA, \$139M 	<ul style="list-style-type: none"> • General Mills, \$877M • Coca-Cola, \$432M • Mondelez, \$200M • GSK, \$134M • Bacardi, \$60M
 Interpublic Group	<ul style="list-style-type: none"> • Johnson & Johnson, \$1.5B • Coca-Cola, \$432M • Safeway, \$130M • CVS Pharmacy, \$93M • LATAM Airlines, \$20M 	<ul style="list-style-type: none"> • Hyundai Kia, \$718M • Kraft Heinz, \$318M • Tesco, \$192M • Subway, \$30M • American Airlines, \$27M
OmnicomGroup	<ul style="list-style-type: none"> • SC Johnson, \$400M • GSK, \$404M • Bacardi, \$160M • Unilever, \$111M • Ferrero, \$90M 	<ul style="list-style-type: none"> • Johnson & Johnson, \$1.2B • COTY, \$300M • VISA, \$220M • Safeway, \$130M • Huawei, \$120M

Comments: Publicis retained their portion of Kraft Heinz and gained \$318M from IPG, Havas Media lost \$135M of COTY, PHD kept GSK in the US and Canada; Mindshare and MediaCom kept it in South Africa and India and won in several new markets increasing GroupM share; and Starcom lost the Novartis portion.

DELIVERING CLIENT ADVANTAGE

Intelligence to find & create valuable audiences

Data & Tech to reach & engage them

Effectiveness & efficiency throughout

THE POWER OF ONE-VOICE TRADING



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ANALYTICS

STRATEGY

DATA & TECH PLATFORMS

NEGOTIATION

EXECUTION

VENDORS

CONTENT PRODUCERS

Media Platforms + Tech Vendors
+ Content Developers

 CBS  VIACOM

 msn  facebook.

 Google  YouTube 

 News Corporation

 DISNEY  Time Warner

 NBCUniversal  YAHOO!

 CONDÉ NAST

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GROUPM ADVANTAGE

- Apply all the data to all the inventory all the time
 - Both anticipatory and real-time
- Fast and accurate integration of our systems and data with the data of our clients
- Create knowledge asymmetry externally & knowledge symmetry internally to power our integrated offering
- GroupM is in the media investment management business
 - We have a view into every media channel, marketplace and client category
- Uniquely placed relative to Adobe, Oracle, IBM, etc.
 - They can partner with us in creating growth opportunities for our clients

DATA TECH EXECUTION

- Developed our own data and tech stack
- Anonymized PII spine to create persistent profiles
- Less depth than walled garden players, but much broader view
- Greatest value comes from conjoining data elements, not from individual data elements
 - Not just analytics and insights, but focused on activation
 - Single end-to-end solution provides high reaction speed

DEMANDING INTEGRITY IN THE MARKET



THE WALL STREET JOURNAL CMO TODAY

CMO TODAY

LATEST NEWS SOCIAL VIDEO AGENCIES

4:48 AM EDT
AD TECH

GroupM Plans to Ditch Open Ad Exchanges

By JACK MARSHALL

WPP's media buying unit GroupM will stop buying online ads from open ad exchanges entirely by the end of the year, according to its chief digital investment officer, Ar Bluman.

Open ad exchanges are the automated online marketplaces through which large quantities of digital ads are now sold. They are designed to provide marketers with an easy way to purchase advertising across a wide range of websites, as opposed to striking deals directly with multiple publishers individually.

But according to Mr. Bluman, available in these markets, the agency group no longer, although it will

CMO TODAY
Bright Analytics
Does Your Market From Desktop Bias

GroupM Sees Results After Controversial Viewability Stance

By Alison Schiff // Monday, May 11th, 2015 - 2:40 pm

John Montgomery, COO of GroupM Interaction, North America will be presenting inventory quality and supply chain issues in the long ecosystem.

Montgomery's upcoming ClearAdLabs conference on June 3, is one on "visibility" is clear: "If an ad can't be seen, then it's not going to pay for it," said John Montgomery, COO of GroupM Interaction, North America. "Frankly, if an ad isn't viewable, it's not going to pay for it."

His client Unilever announced last year that they would 100% in-view display impressions, in stark contrast to the industry's 50% in view for one second. And while the first calls for 50% of videos to be in view for at least two continuous seconds, said that its advertisers will not accept anything less than 100% in-view players the video content viewed, with the audio on and autoplay off.

GroupM has agreed to trade on these higher guarantees, although the publisher recently with the caveat that the same rules don't apply to native.

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Why Advertisers Should Care About the White House Report on Big Data and Privacy

GroupM John's Montgomery By Katy Bachman

The government has just not yet another report on big data and privacy, businesses that have several concerns and dominated press headlines. So in this latest report, something advertisers should care about? Adweek asked GroupM Interaction COO John Montgomery, who met with the White House policymakers that wrote the report. Below, he gives our what report the administration's latest policy pronouncement will have for data-driven advertising.

Why should advertisers pay attention to the White House report?

We should care a lot about it. It was a good and clearly written report. If anyone of my clients wants a cut on big data, I'm going to send them this report. This report is very relevant because a lot of what drives this business is programmatic media buying. There are millions of places to advertise on the Web, so an algorithm will decide what your likely audience will be.

What's the good news in the report for advertisers?

There's a lot of good news in the report, but

Boost Digital Intelligence with Tag Management
Free Forecast Research Report
SAPPHIRE
TELLMUS

DIGITAL CONTENT OFFFRONTS
SPOTTIFY
WUNDER
HELLMUTS
HEER

The Best for the Mobile Revolution

BeetTV WITH THE BEET, BEING THE ROAD TO CANNES

WPP Digital Chief Says No to Fraud: "We Only Want Human Activity"

It's Here: Measurement For Tougher Viewability Standards

MRC Accredits Moat, Others To Track More Stringent Standards Required by Group M, Unilever

By Jack Hall // Published on March 05, 2015

293 stories

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their demands was that no one was accredited by the nation's media-measurement arbiter to use the stricter rules. Now, that problem appears largely to be solved (though the question of what the standards should be remains).

Media Rating Council CEO George Hris said the group has accredited a few companies - including Moat and others he declined to name - to measure viewability under rules more stringent than the ones it set for online video and display ads last year. But he added that accredited measurement firms will still be required to report compliance with the MRC standards, and said that one aspect of the GroupM/Unilever preferred standard is impossible to accredit around.

Despite accrediting tougher measurements, the MRC

ADWEEK
THE PRICE: TELEVISION TECHNOLOGY ADVERTISING & BRANDING ANALYSIS VIDEO TRENDS

GroupM Takes Lead on Mobile Privacy Guidelines

Voluntary system would mask phone IDs, allow users to opt out By Katy Bachman

By Katy Bachman

www called to Capital Hill to lobby, iPhone and Android

Women to Watch

Toast the 2015 Ad Age Women to Watch

Wednesday, August 5, 2015

REGISTER TODAY

In Partnership with



APPENDIX

A nighttime photograph of a city, likely Cape Town, South Africa, with a large, flat-topped mountain (Table Mountain) in the background. The city lights are visible, and the sky is dark blue. The word 'APPENDIX' is overlaid in large white letters.

EXCLUSIVELY OPERATING AT SCALE FOR OVER 12 YEARS

NETWORK	GLOBAL BILLINGS (\$BN)
GroupM	\$106.0
Omnicom OMG	\$55.3
Dentsu Aegis Media	\$46.1
Starcom Mediavest	\$43.2
Interpublic Mediabrands	\$37.1
Zenith Optimedia	\$36.2
Havas Media	\$19.6

SOURCE: RECMA 2014

* Publicis media agencies do not negotiate together in most markets, making GroupM the largest single negotiating group everywhere.



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THANK YOU