

# DIGITAL AT THIS POINT

MARIA KOLOSOVA, CEO GROUPEM RUSSIA

24 MAPTA 2021

# Shifts in human behavior influenced digital tech & media acceleration

## E-COMMERCE

**80%**

Russians purchase online minimum once a month vs 20% in H2 2019

## CONTENT

**17%**

Online cinemas growth in Russia in 2020 from 53 to 63 mln people in 2020

## ECOSYSTEMS

**22%**

Russians have regular subscriptions on digital services

## DATA

**41%**

people are ready to exchange their data for free services rather than to pay for them

# E-COMMERCE: growth in 2020 is estimated as 2,5 trl RUR (9,6 % of retail)

## Boom is mainly driven by the major vendors

- Online grocery is being consolidated (**55%** - 5 companies)



- Google plans to turn **YouTube** Into Ecommerce giant in 2021
- **Avito** started working on the marketplace model.

## E-commerce is becoming a part of digital ecosystems

- **Sber** ecosystem will use Goods.ru to create a key multi-category E-commerce player in Russia
- **Yandex** Foodtech grew by 366% in 2020

goods Яндекс @Еда



## Content is a huge performance driver in e-commerce

- Proper e-merchandising could bring to businesses **~30% sales uplift**
- Internal search algorithms are constantly changing & demand focus to continue growth

## HOW TO RESPOND?

- Fix fundamentals in-company capabilities starting from people, moving to tools, products & partnerships

# CONTENT: market sets high standards to each channel performance including video

## TV

- TV is becoming a performance channel with new tech opportunities: QRTV, audio watermarks and narrow TA targetings

## Online video

- Auction buying, own DMPs or data partnerships provide higher opportunities for video to act not only as image but also as performance channel



## Online cinema

- 2020 was a boost year for online cinemas and the trend will continue in 2021
- Dynamic distribution with new technologies (O2O, AR/VR) gives more growth opportunities

## HOW TO RESPOND?

- Consider balance between classic services and new features based on business KPIs for further incremental growth

# CONTENT: Influencer marketing focusing on outcomes by applying analytical based approaches and leads models

## Data usage boosts influencers efficiency

- Planning opportunities: category purchases, psychographic, brand attitude, etc
- Toolkit for influencer activation impact forecast & benchmarking

Yolocowib

## Computer vision and text technologies are used to analyze

- Best branded content by ER%
- Identify niche influencers by objects in their content
- Find most “discussion boosting” influencers

## Market maturity drives variety of buying models

- Demand for efficiency leads to new buying models: e.g. buying with guaranteed outcome by CPM/CPE/CPC

## HOW TO RESPOND?

- Diversify work with influencers according to objectives, use existing data-driven tools for influencers' selection & impact measurement



**ECOSYSTEMS: The largest technological players are in a state of battle for all major consumer verticals, and in the post-covid world only intensifies the competition for leadership**



### **HOW TO RESPOND?**

- Consider building your strategy using ecosystems` capabilities where it is relevant in reaching your business KPIs

# COOKILESS WORLD: Consumers` privacy anxiety influences on industry rapid changes

## Tracking limitations

- Browsers cancelling use of third-party cookies
- Apple and Google launching restrictions of opt-out collection of mobile AD IDs
- GDPR, CCPA, amendment to Russia laws deliver people's control over their personal data



## New ways of work are evolving

- Universal IDs
- Contextual targeting
- Cohort browser based tracking
- CDPs and Data clean rooms
- More advanced data exchange schemes and **loyalty programs**
- **Data Ethics** as the new philosophy for operations



## Changes on the agenda

- Higher measurement fragmentation
- Aggregated audience tracking vs individual level in order to protect users privacy
- Unclear future of cross-channel measurements

## HOW TO RESPOND?

- It is time to accept upcoming changes and start test & learn of new approaches in strategies to be prepare for the full roll-out

# What we`re getting ready for as an industry?

## CONSUMER

Consumer's  
pocket doesn't  
grow

## INDUSTRY

Media is content  
& product  
distribution  
channel now

## SKILLSET

Versatility

# What we`re getting ready for as an industry?

## CONSUMER

Consumer's  
pocket doesn't  
grow

#short- & long-term balance  
#brandformance video  
#content personalization

## INDUSTRY

Media is content  
& product  
distribution  
channel now

#data strategy #DCO  
#cookiless personalization  
#distribution #commerce  
#promo #crm #brandsafety

## SKILLSET

Versatility

#agile #dashboard #design  
thinking #machine learning  
#ai based analysis  
#project management