

INCLUSION WITHOUT EXCEPTION

MARIA KOLOSOVA
CEO GroupM Russia & CIS

5 KEY DIMENSIONS FOR DE&I

AGE

GENDER

SEXUAL ORIENTATION

**PHYSICAL and HEALTH
CONDITIONS**

CULTURAL BELONGING
(nationality, ethnicity, education, income, religion)



KEY PREDICTIONS: What is next for Diversity?

2040 Aging populations

The median age in countries including Japan, Singapore, South Korea, Italy and Spain is projected to rise above 50 by 2040

2050: 10 bln people on Earth and vast majority are ethnicity and nationalities coming from China, India, Africa, Latin America

2020

COVID-19

Women are doing significantly more domestic chores and family care, because of the impact of the pandemic. The coronavirus pandemic could wipe out 25 years of increasing gender equality.

2040

2050

2050 The USA and UK become a 'minority-majority' country

The USA is predicted to lose its white majority for the first time since the 1600s according to the US Census Bureau.

WITH GREAT POWER COMES GREAT RESPONSIBILITY



PURPOSEFUL BRANDS VALUE HAS INCREASED BY 175% DURING LAST 12 YEARS

- Attract new consumers for whom that's important
- Improve HR brand of the company: inspire current employees and attract new progressive employees
- PR: build image of a progressive company
- GR: Improve relations with government
- Improve the image for investors (Dow Jones Sustainability Indices since 1999)



AS PEOPLE BECOME MORE MINDFUL, THEY EXPECT BRANDS ALWAYS TO BE PURPOSEFUL AND SUSTAINABLE

68%

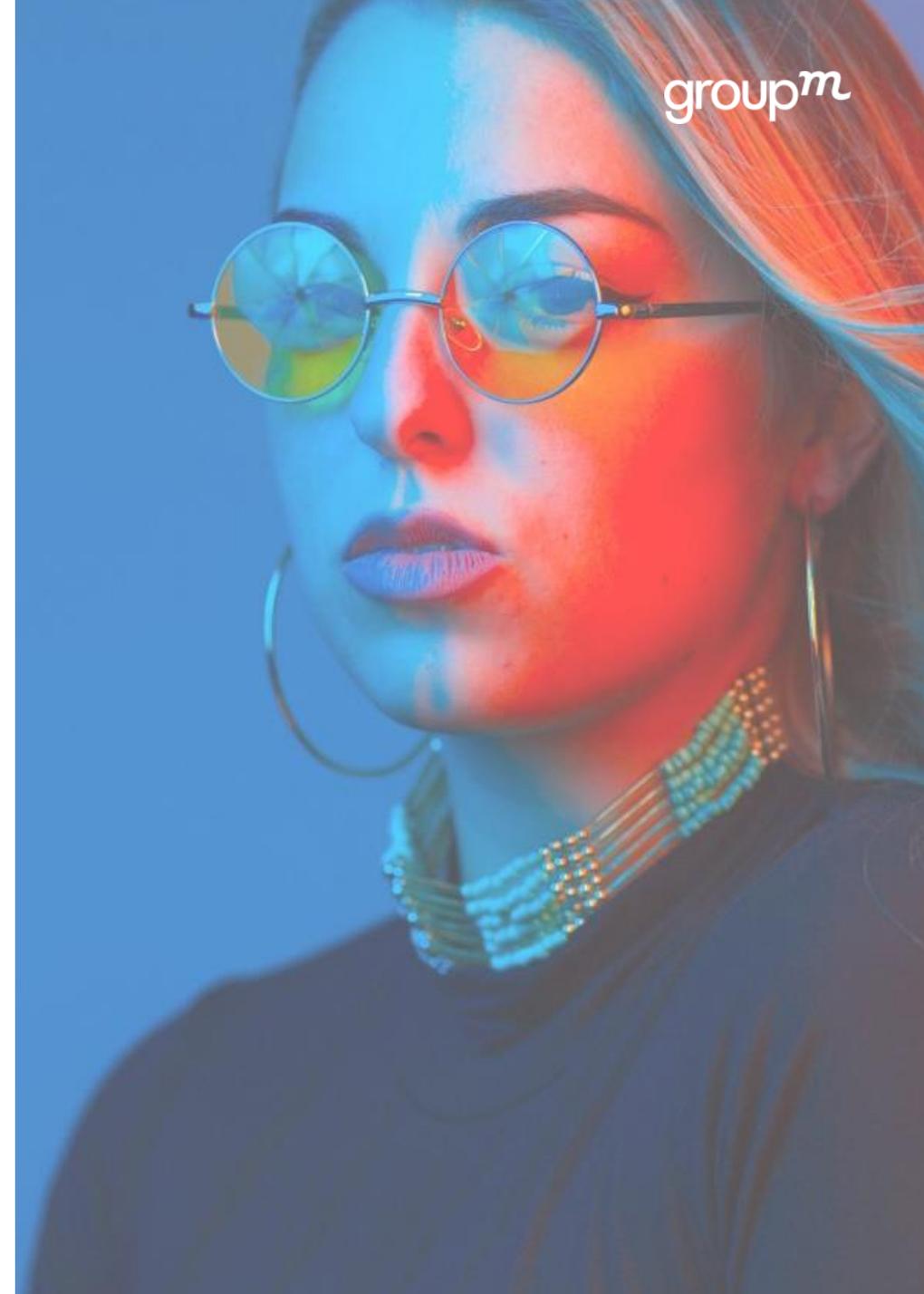
Expect brands to be clear about their values

46%

Millennials expect brands to be brave in their social position

34%

Americans can boycott a brand due to ethnical or cultural beliefs



RUSSIA

Sustainability is becoming important for consumers, especially for gen Z and millennials, people living in Moscow and big cities, especially women

61%

Gen Z and Millennials like purposeful brands vs 53% of mid-aged people

48%

Russians agree that Media is not representing diversity

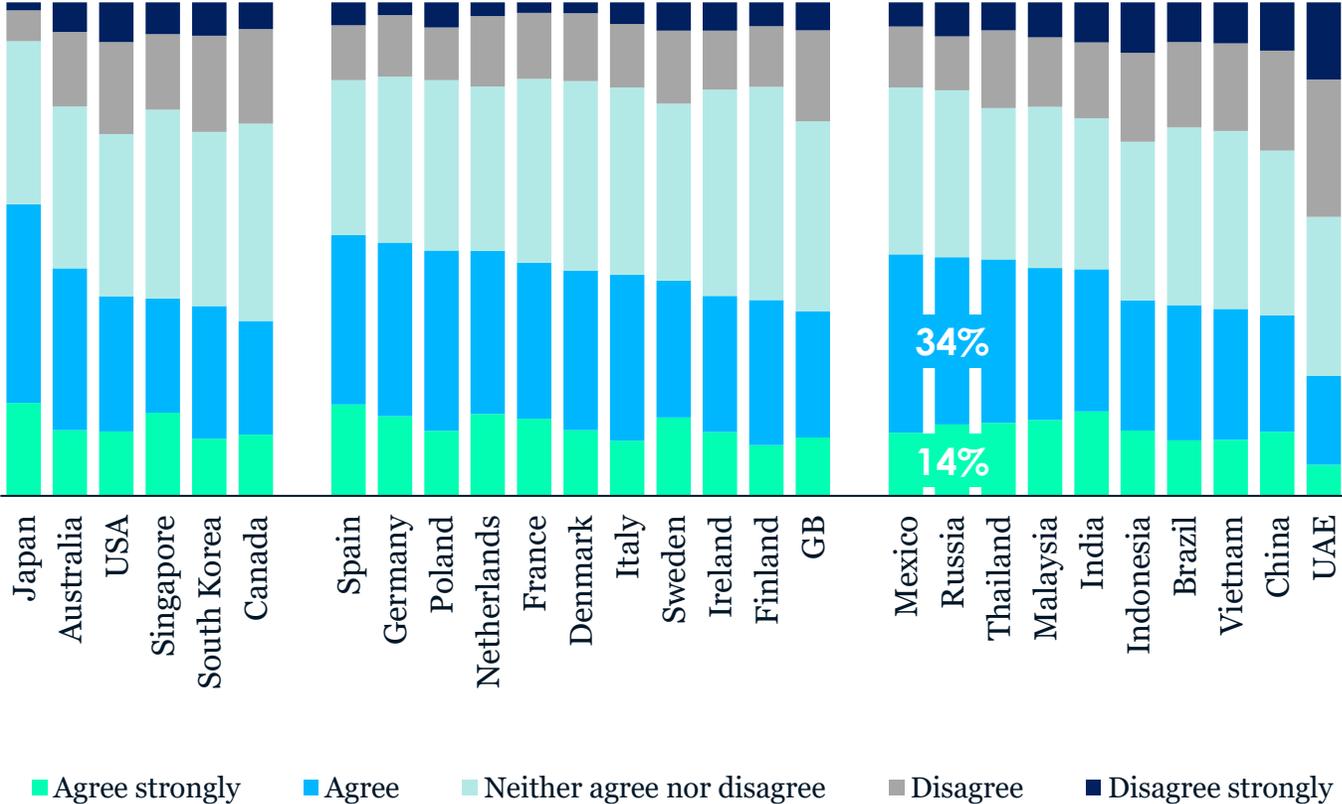
26%

Russians can boycott a brand due to ethnical or cultural beliefs



48% OF RUSSIANS THINK OUR MEDIA – TV SHOWS, MOVIES ARE NOT REPRESENTING DIVERSITY THIS IS ONE OF THE WORST LEVELS GLOBALLY

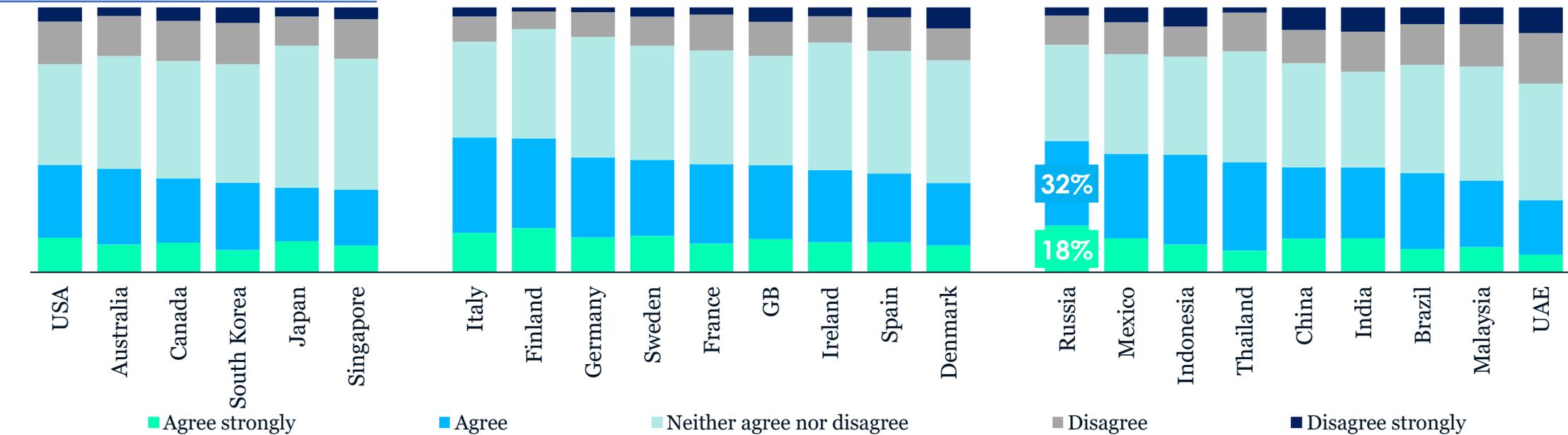
"The media industry in my country is not doing a good job at representing diversity in TV, films etc."



FOR ADVERTISING SPECIFICALLY 50% OF RUSSIANS ALSO THINK IT IS NOT REPRESENTING DIVERSITY

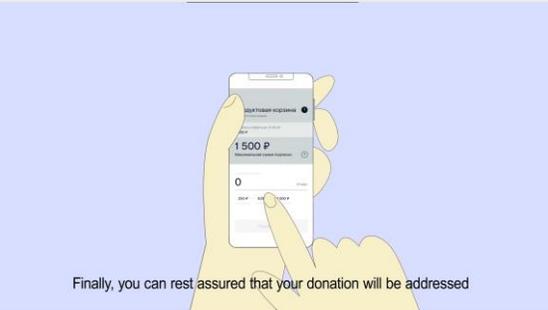
There is a clear global opportunity we can address together

"Advertising in my country is not doing a good job at representing diversity"

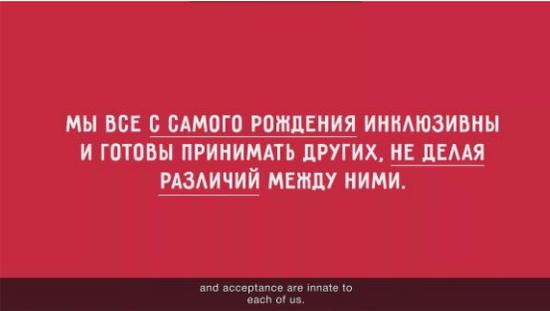


DE&I AGENDA MANIFESTED ITSELF IN POSITIVE CHANGE NOMINATIONS OF EFFIE AWARDS

HELP APP

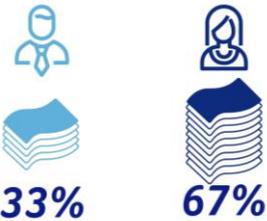


NGO NAKED HEARTS

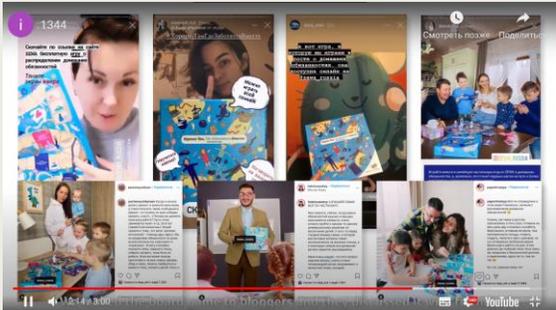


ZEWA

Как делятся домашние обязанности?



Is there a problem? women have twice as many house chores as men



DIVERSITY & INCLUSION IS A TOP PRIORITY FOR WPP, GROUPEM GLOBALLY AND IN RUSSIA

1

WPP INITIATIVES

- Global inclusion council
- WPP safe rooms
- Walk the talk

2

WPP DIVERSE TEAMS

- 40% women in executive leadership (2019: 37%)
- 51% women in senior management (2019: 50%)
- Industry leader in the Bloomberg gender-equality index

3

GROUPEM FRAMEWORKS

- Responsible investment framework
- Multicultural marketplace
- Diverse voices accelerator

4

GROUPEM RUSSIA

- 80% women in executive leadership
- 70% women in client leadership
- 78% women in total staff

«Our expertise, creativity and ability to shift opinion and change behavior can help to build a more sustainable and equitable world»

David Henderson
Global Corporate Affairs Director, WPP

THANK YOU

MARIA KOLOSOVA

RUSSIAN MEDIA MARKET 2021 FORECAST

GroupM

JUNE, 2021



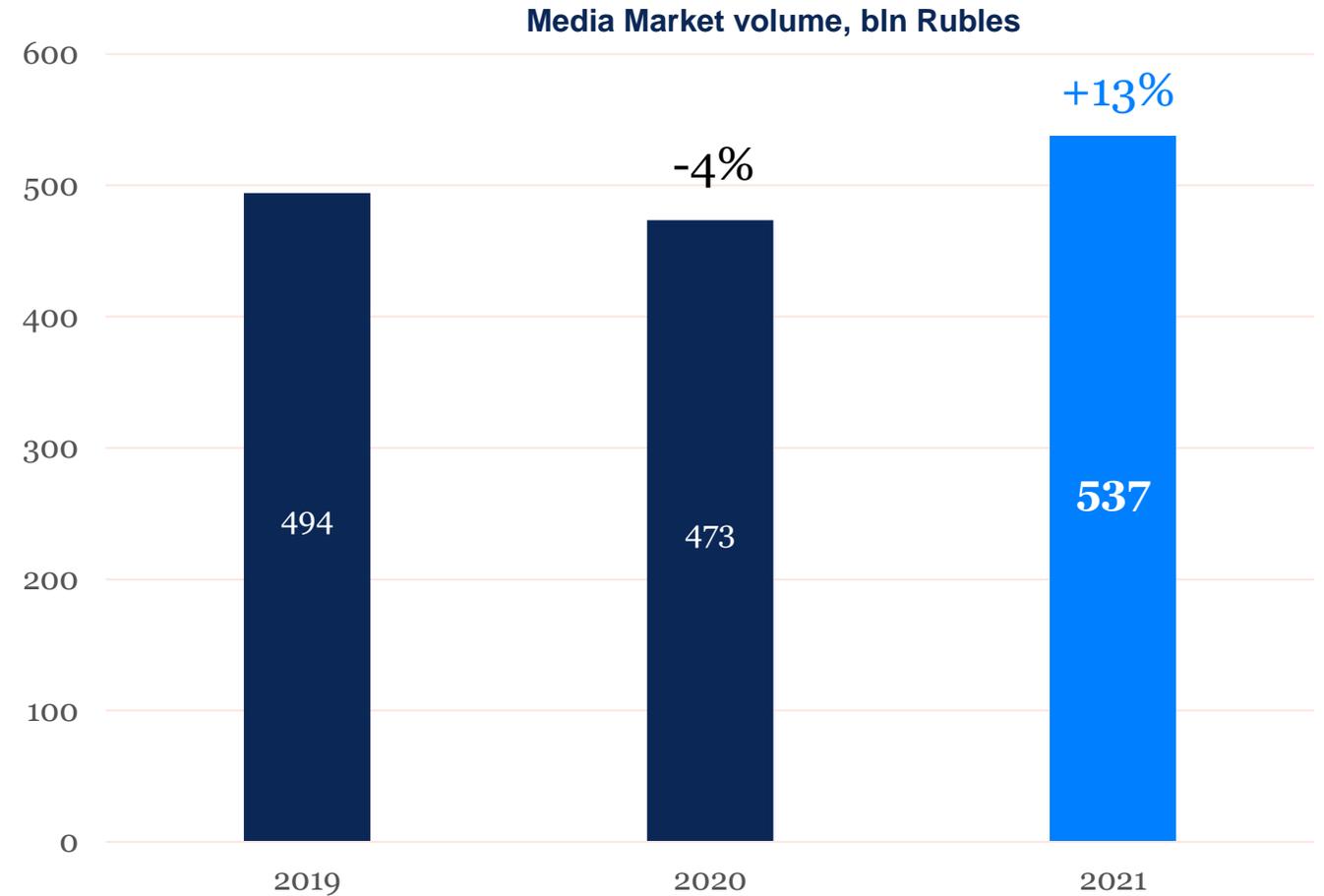
RUSSIAN MEDIA MARKET IS EXPECTED TO GROW BY 13% IN 2021

+6% vs. pre-pandemic 2019

In 2021 Russian Media Market can reach its historical maximum – 537 bln Rubles

The previous Media market volume record was in 2019 (494 bln Rubles)

■ Actual ■ Forecast



ALL MEDIA WILL SHOW GROWTH, EXCEPT PRINT

Digital remains the main growth driver

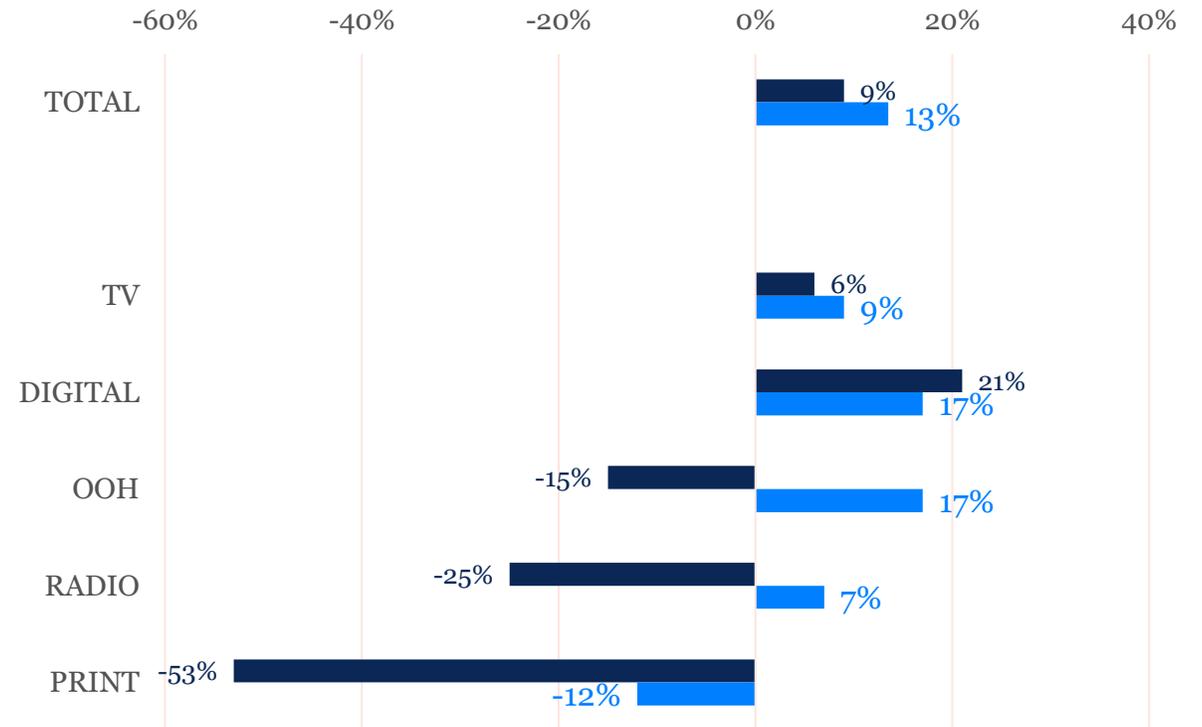
Digital spending expected to grow by 21% vs. 2019

TV can grow by 6% vs. 2019

Despite the increased investments in 2021, Radio and OOH will not restore their positions - negative dynamics will remain against 2019

■ 2021 / 2019 Growth rate, % ■ 2021 / 2020 Growth rate, %

Dynamics by media



THANK YOU

MARIA KOLOSOVA