

MEDIA INVESTMENTS: TO BE OR NOT TO BE

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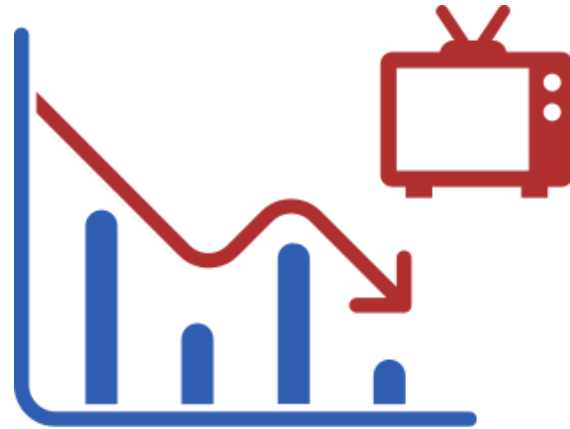
OUR INVESTMENT PRINCIPLES

- ▮ NESTLE PURPOSE
- ▮ RELEVANCE TO CONSUMERS
- ▮ SUSTAINABLE GROWTH OF OUR BRANDS
- ▮ POSITIVE ROI
- ▮ COMPLIANCE



**YET WE HEAR INCONSISTENT MESSAGES
FROM THE INDUSTRY**

TV VIEWERSHIP IS DECLINING...



**... BUT ONLY FEW DARE TO INVEST
IN BREAKTHROUGH CONTENT**

SHARE OF MOBILE PENETRATION IS HIGHER THAN DESKTOP



... BUT MOBILE IS NOT MEASURED

**OUR MARKET USED TO BE
UNIQUE & COMPETITIVE**

... BUT WHERE IS A STEP CHANGE?

MEDIA INDUSTRY IS STAGNATING

ADVERTISERS NEEDS

- ▮ BRANDS WITH PURPOSE
- ▮ TRANSPARENCY & REPUTATION
- ▮ RELEVANCE TO CONSUMERS
- ▮ GROWTH OF OUR BRANDS
- ▮ POSITIVE ROI

MEDIA INDUSTRY REALITY

- ▮ POOR CONTENT QUALITY
- ▮ NO BRAND SAFETY
- ▮ LACK OF MEASUREMENTS
- ▮ LIMITED REACH
- ▮ POOR MEDIA ROI

STATUS QUO...

HOW WE SEE IT



INVESTOR'S DEMAND TO INDUSTRY

- ▮ **TRANSPARENCY & BRAND SAFETY**
- ▮ **TRUE OMNI CHANNEL APPROACH**
- ▮ **EFFECTIVE MOBILE MEASUREMENT**

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