

# MARKETER'S STATE OF MIND: BRIEF SNAP SHOT

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group<sup>m</sup>

MINDSHARE 

MEDIACOM

Wavemaker

MARKET OUTLOOK

# HOW THE PANDEMIC HAS AFFECTED THE MARKET AND WHAT **IS NEXT?**



we have conducted an expert's survey in Russia  
and EMEA to answer these questions

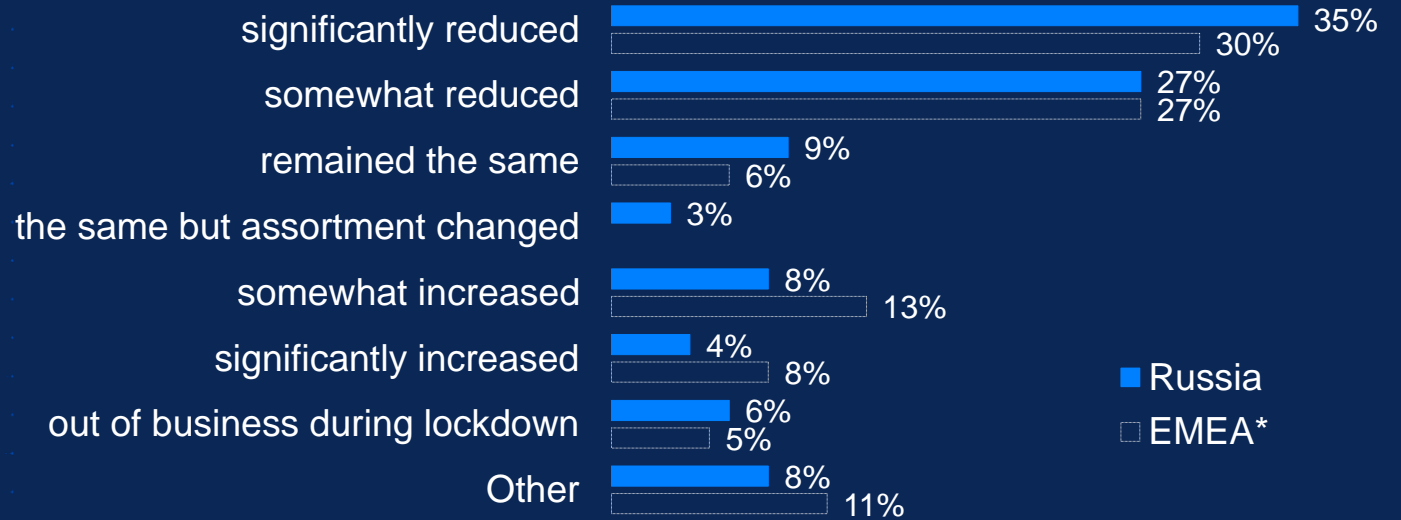
MARKET OUTLOOK

# 62% OF RUSSIAN CONSUMERS REDUCED SPENDING DURING LOCKDOWN



**BUY LESS**

Q: How lockdown period has changed your consumers spending?



■ Russia  
□ EMEA\*

\* Europe, Middle East and Africa

MARKET OUTLOOK

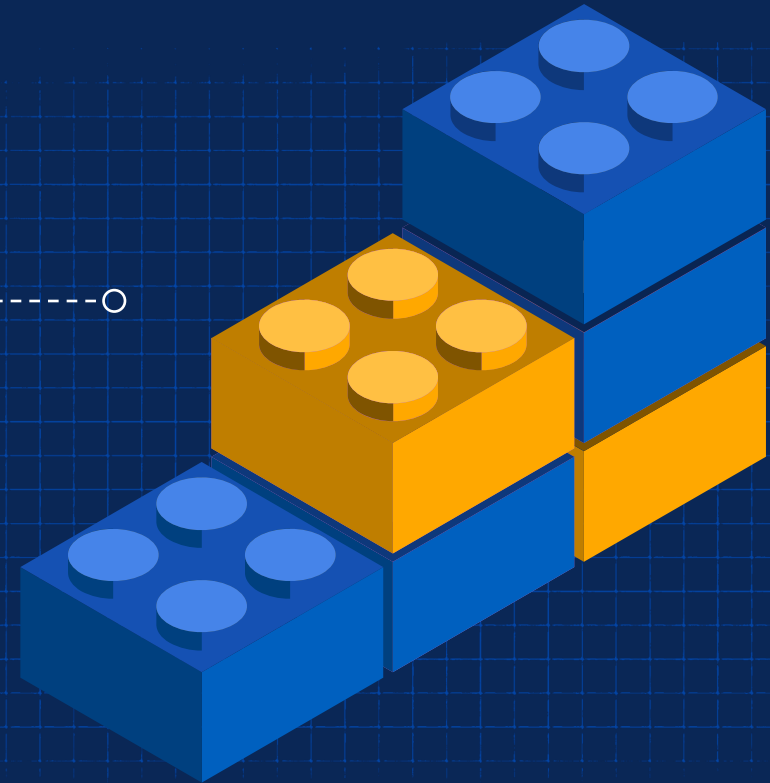
# WHEN NORMAL WILL COME BACK?

**ADVERTISING**

*Recovery*

**BUSINESS**

*Recovery*



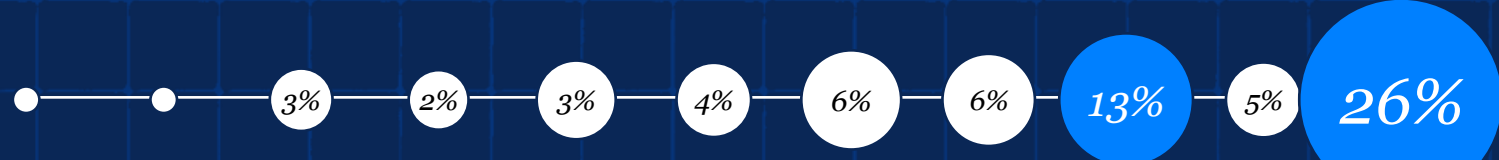
MARKET OUTLOOK

# WHEN NORMAL WILL COME BACK?

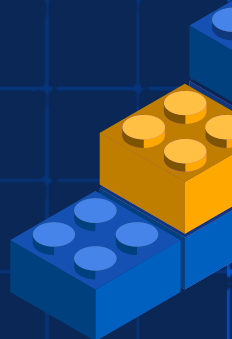
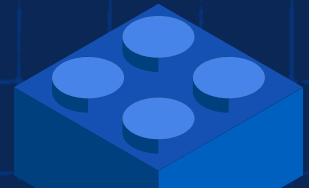
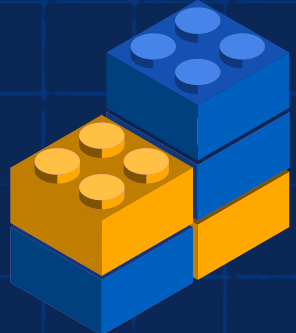
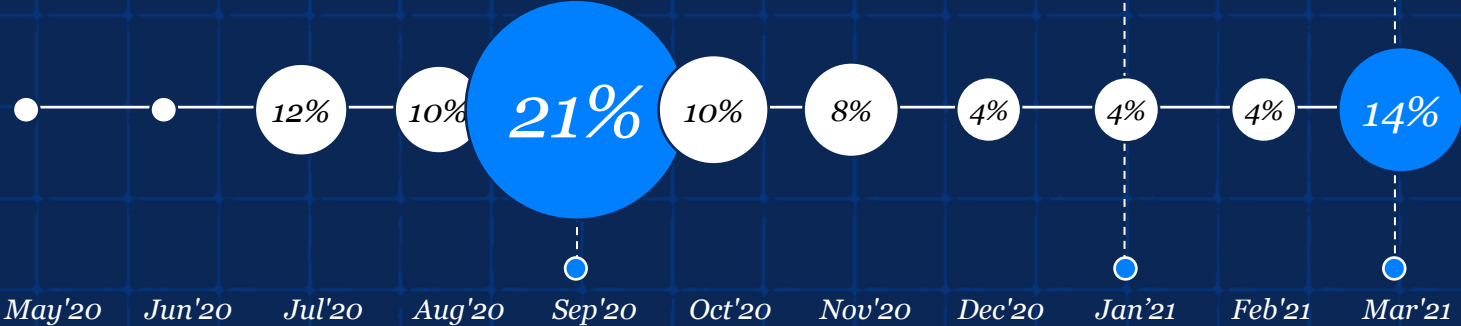
Q: When do you expect to hit the following recovery milestones?



*Back to normal*  
**AD INVESTMENT**



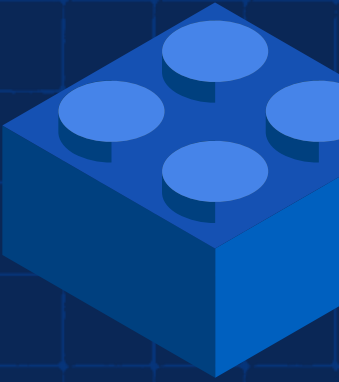
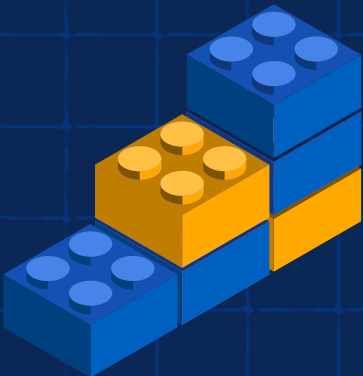
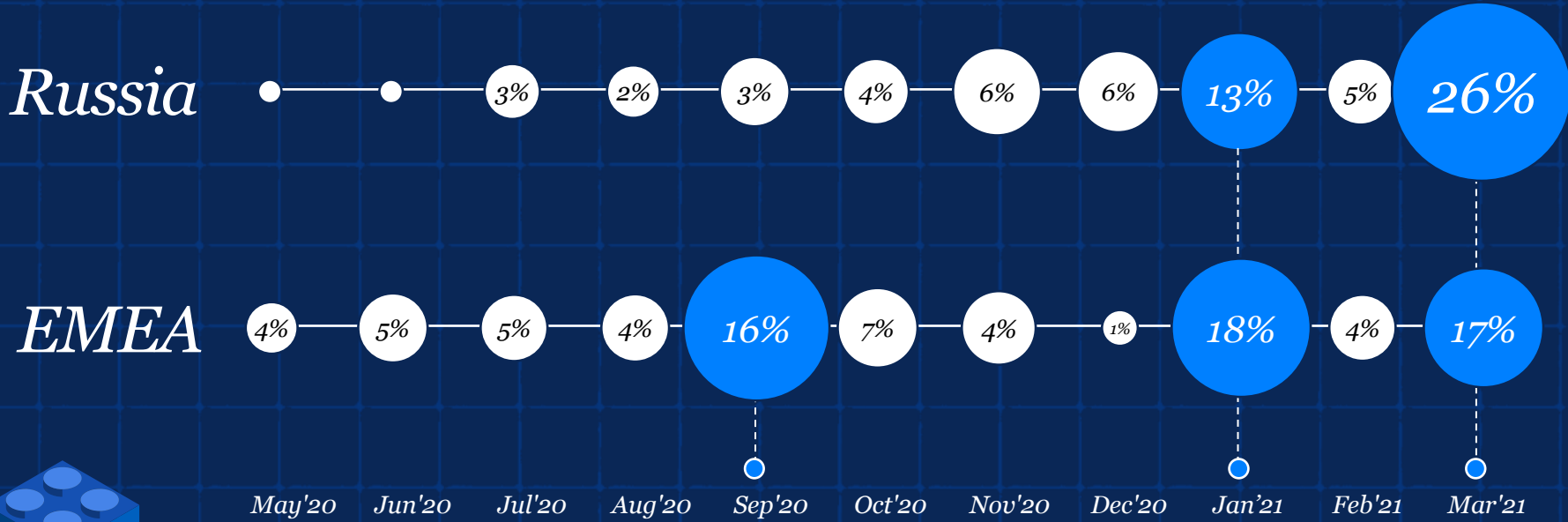
**BUSINESS**  
*Recovery starts*



MARKET OUTLOOK

# MORE POSITIVE OUTLOOK IN EMEA, AS THEY STARTED WITH QUARANTINE EARLIER

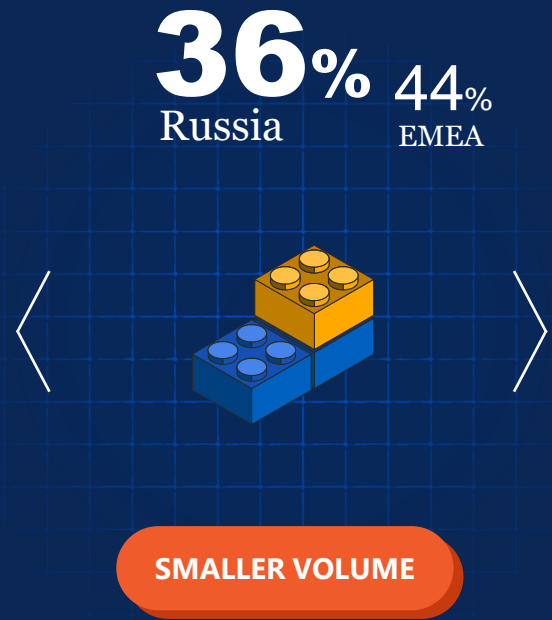
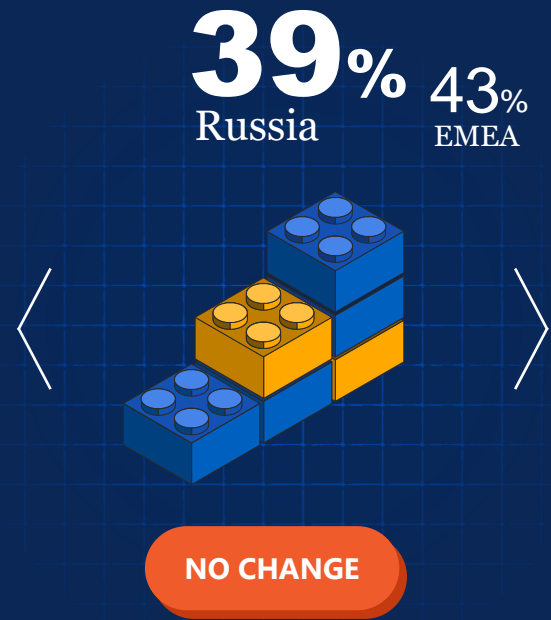
*Back to normal*  
**AD INVESTMENT**



MARKET OUTLOOK

# 39% OF MARKETERS PLAN TO COME BACK WITH USUAL AD INVESTMENTS LEVEL

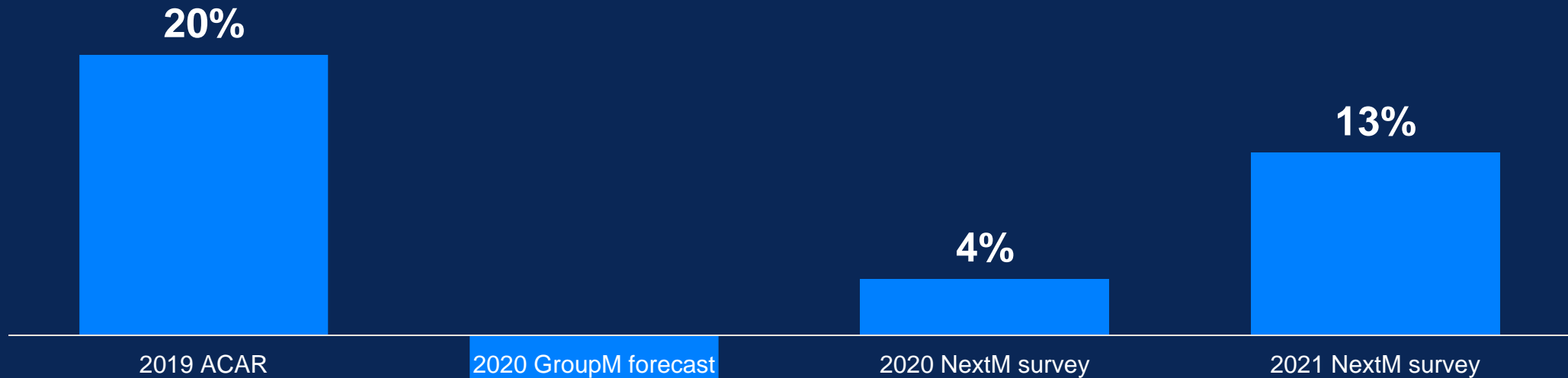
Q: What volume of advertisement do you expect for your business during post-lockdown?



MARKET OUTLOOK

# DIGITAL MARKET DYNAMICS FORECAST

Q: What is your forecast of digital market advertisement?



AKAP

group<sup>m</sup>

next<sup>m</sup>  
SURVEY

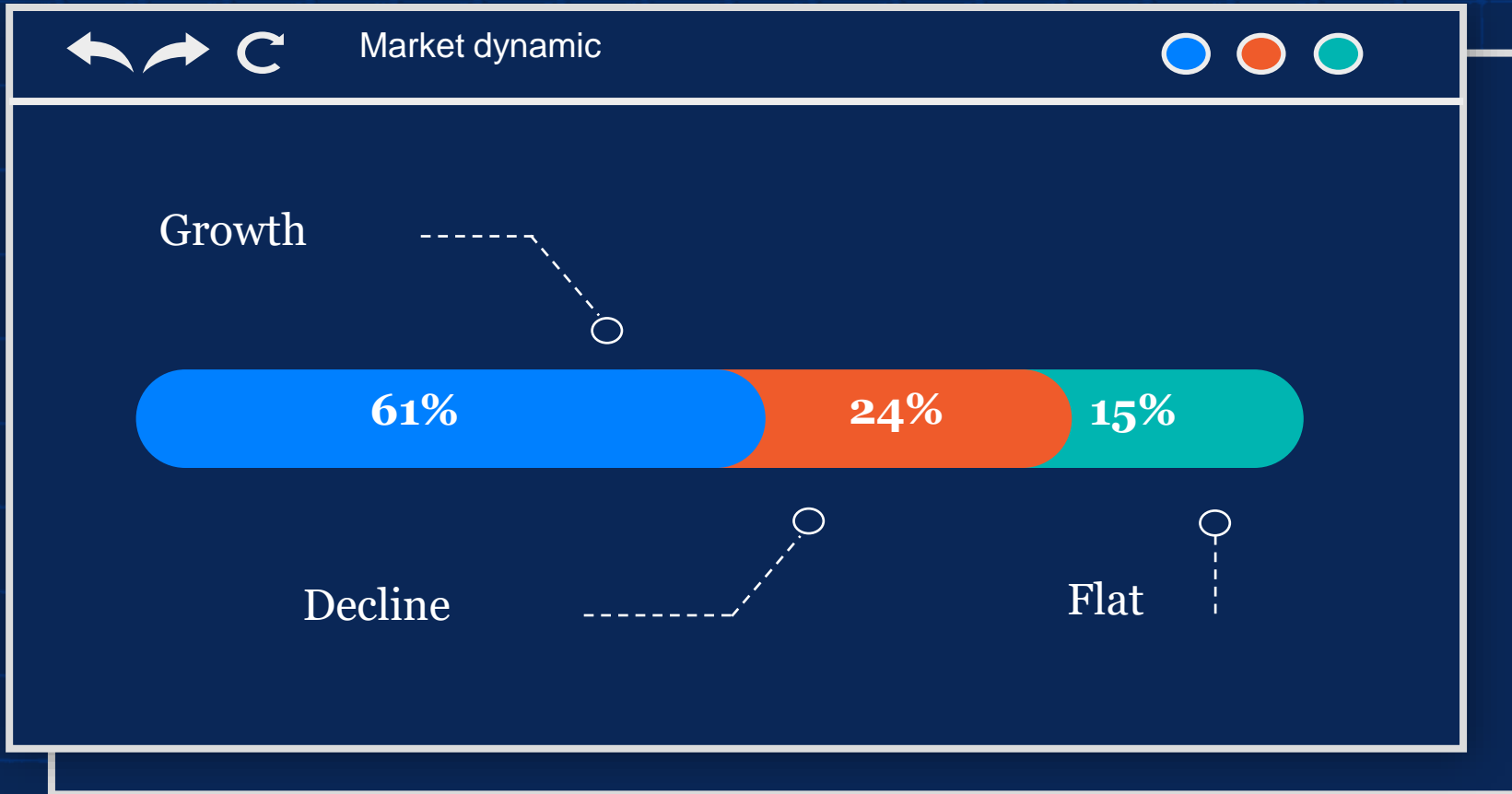
next<sup>m</sup>  
SURVEY



MARKET OUTLOOK

# POSITIVE OUTLOOK = HUNGRY FOR GROWTH

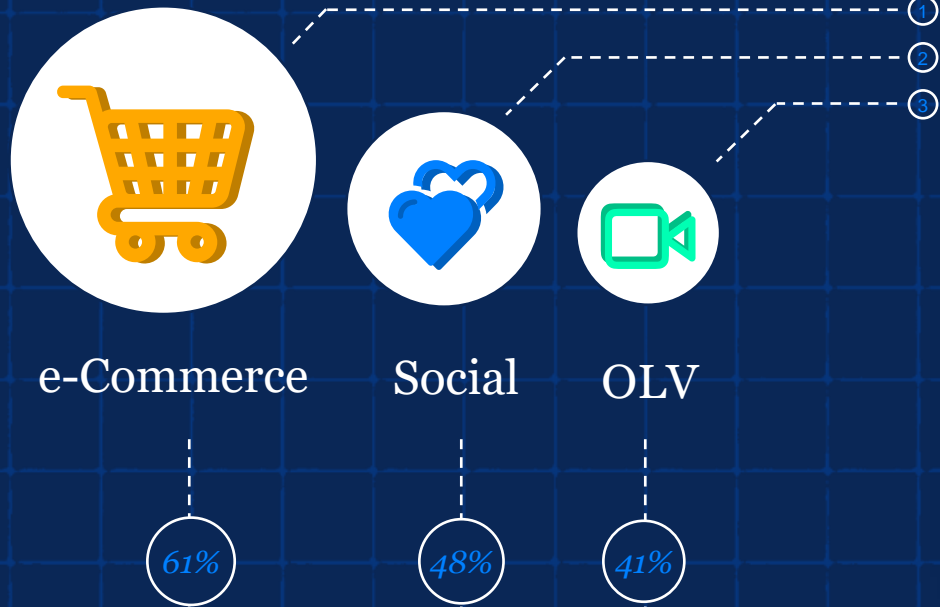
Q: What is your forecast of digital market advertisement in 2020 ?



MARKET OUTLOOK

# SOURCES OF GROWTH IN POST-COVID REALITY

Q: What touchpoints and tools will grow in your media mix after lockdown ends?

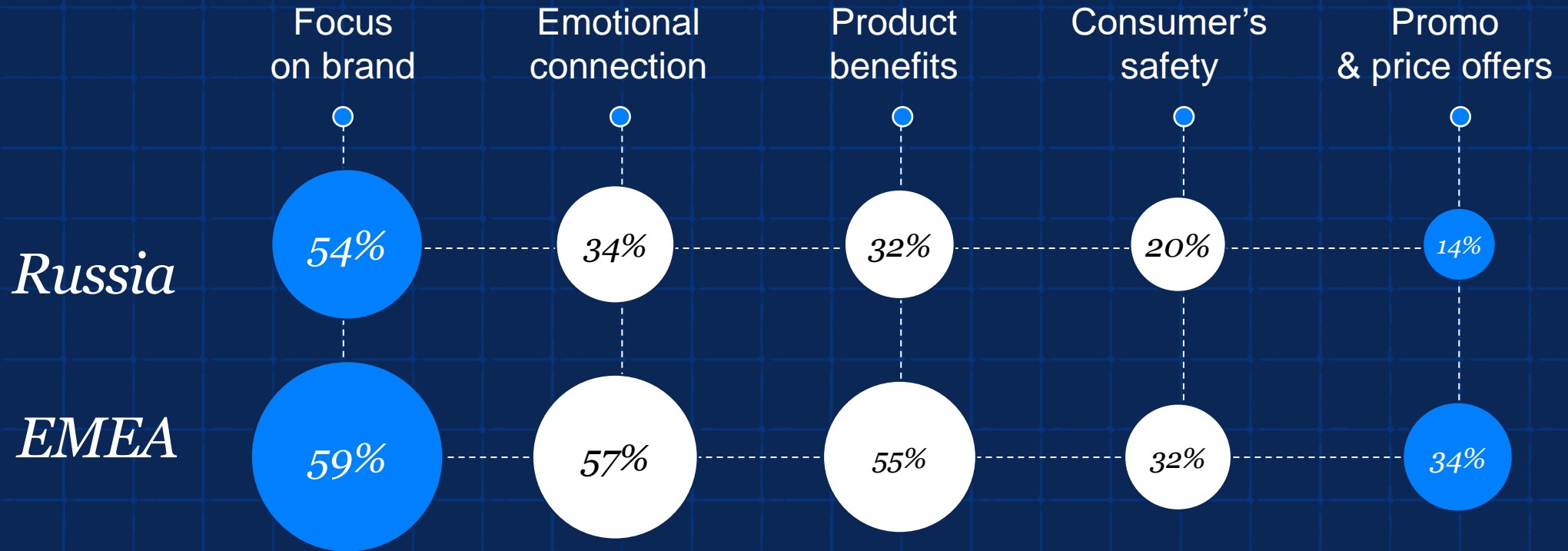


Touch points & tools (% Planned to increase)	
e-Commerce	61%
Social	48%
Online Video	41%
Influencers	34%
Content	32%
Search	29%
Programmatic	27%
Research	23%
TV	7%
OOH	5%
TV Sponsorship	4%
Radio (incl. online)	0%
Print	0%

MARKET OUTLOOK

# BRAND VS PROMO

Q: What messages will be in main focus in your post-lockdown advertisement?



# NEW WAYS WORKING



...

NEW WAYS OF WORKING

# PERFECT TIME TO TEST & IMPROVE

Q: What new test & learn initiatives have your company tried in the last 3 months and have they been successful?



**OUTCOME BASED CAMPAIGN**

**REMOTE WORKING**

**ANTICRISIS PRODUCTS**

**E-LEARNING**

**INFLUENCER MARKETING** ★★★★★

**BLOGGERS CAMPAIGN**

**E-COMMERCE**

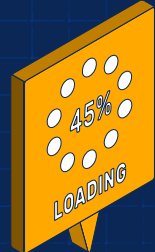
**NEW PROJECT MANAGEMENT TECHNIQUE**

**CALL 2 DELIVERY SERVICES**

**RATING & REVIEWS**

**DATA**

**REMOTE PRODUCTION**



NEW WAYS OF WORKING

# REMOTE WORKING CHANGE OUR VIEW OF BUSINESS PROCESSES

*Q: What percentage of employees does your company plan to keep working remotely after post-lockdown period?*

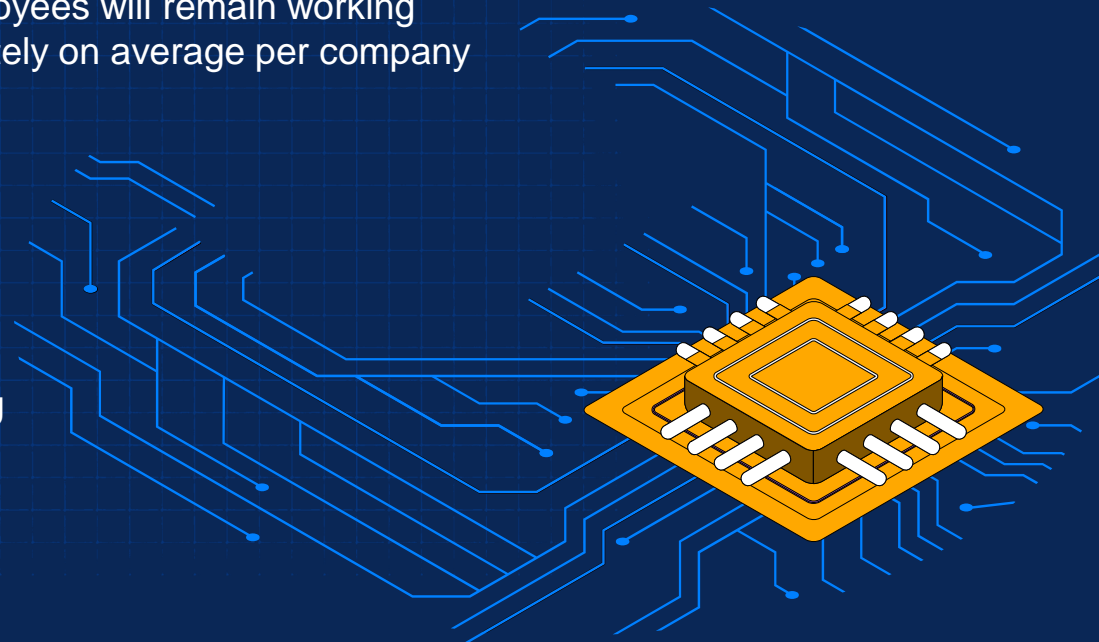


**22%**

Employees will remain working remotely on average per company

**63%**

Plan to leave employees working remotely



NEW ROLE OF AGENCY

# WHAT ARE THE WAYS TO IMPROVE STRATEGIC CAPABILITIES OF YOUR BUSINESS?

Q: Which of the following do you plan to implement during post-lockdown?



← → C Already implemented/are being implemented	
Enhancing of data storage security	47%
Active e-com development	36%

← → C Planned in the company	
New tech developments to increase efficiency	37%
Changing a company's portfolio strategy	24%

NEW ROLE OF AGENCY

# WHAT ARE THE WAYS TO IMPROVE OPERATIONAL CAPABILITIES OF YOUR BUSINESS?

Q: Which of the following do you plan to implement during post-lockdown?



← → ↻ Already implemented/are being implemented

Automation of internal processes	66%
Training/retraining of staff with new skills	32%
Making work processes more flexible	26%
Remote working and processes reorganization	26%
Internal systems Integration and one-window service	26%
Optimization of ineffective company functions	25%

← → ↻ Planned in the company

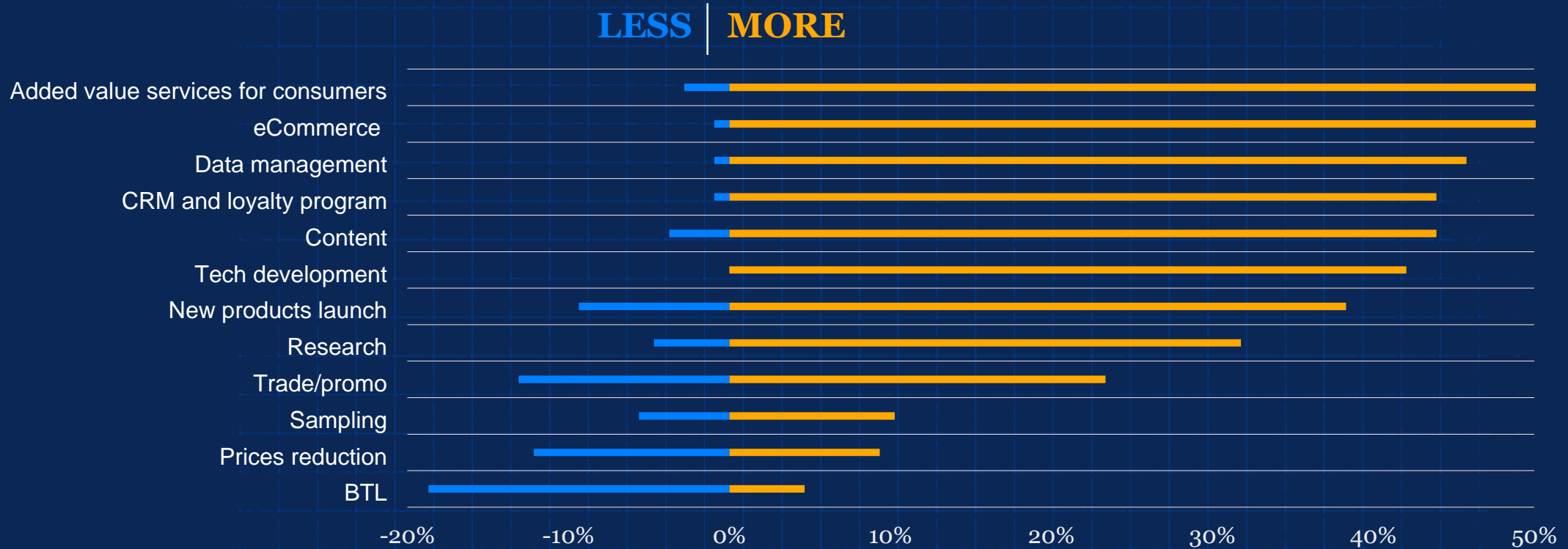
Optimization of ineffective company functions	34%
Training/retraining of staff with new skills	31%
Making work processes more flexible	29%
Remote working and processes reorganization	23%
Internal systems Integration and one-window service	21%
Automation of internal processes	19%



NEW ROLE OF AGENCY

# NEW APPROACHES: IMPROVEMENT OF PRODUCT & ITS VALUE

Q: What tools and approaches do you plan to use more or less during post-lockdown compared to the period it began?



# NEW ROLE OF AGENCY



NEW ROLE OF AGENCY

# HAS YOUR VIEW ON AGENCY ROLE CHANGED IN CURRENT SITUATION?



< 34% >

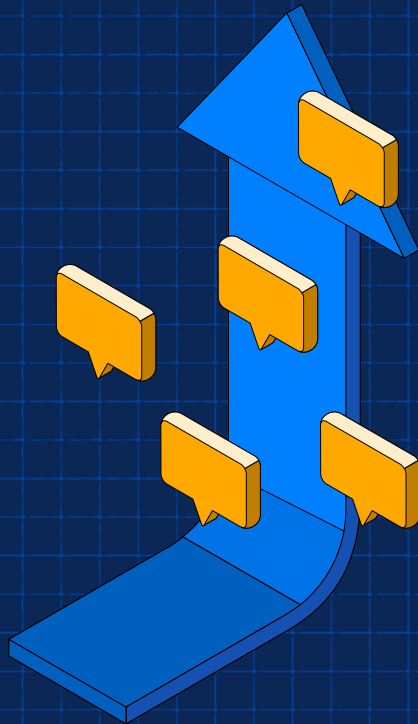
YES

< 66% >

NO

NEW ROLE OF AGENCY

# STRATEGIC AND ANALYTICAL SUPPORT = NEW (OLD) IMPORTANT AGENCY ROLES



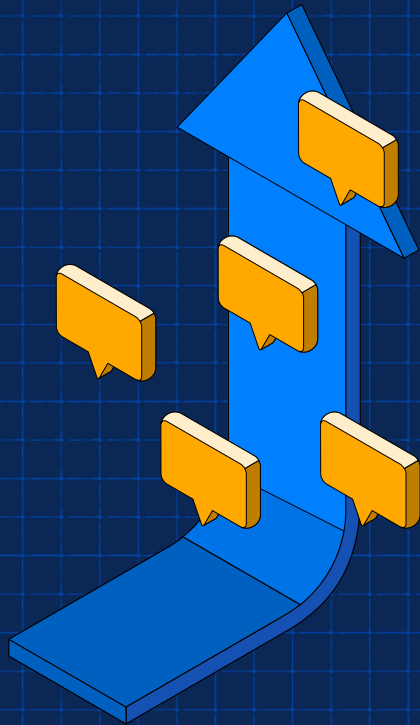
Q: During the crisis what do you see as the role of media agency?



- 01** Key negotiators with media partners
- 02** Strategic support
- 03** Analytical support
- 04** Help act faster when necessary
- 05** The role of the agency has gone beyond the media and more support in these areas as Content, Tech, Data, CRM are expected

NEW ROLE OF AGENCY

# WHAT DO YOU EXPECT FROM THE MEDIA OWNERS?



*Q: What do you expect the most from media owners during and after a crisis?*



- 01** New efficiency-driven services and products
- 02** Readiness for rapid changes
- 03** Flexibility
- 04** Prices reduction

# 3 IMPORTANT CONCLUSIONS

## FORECAST

Digital will be less impacted by the crisis than other channels. Moreover a new active users base has formed which may accelerate growth in the next years.

New Points of Growth:  
Ecommerce, Social, Video

## NEW WOWs

Remote working, automation and technology implementation will drive business acceleration

## NEW ROLE OF AGENCY

Agency is transforming into the strategic and analytical business partner providing executional excellence, tech and data capabilities



**IN  
CONCLUSION...**

# THANK YOU!



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