

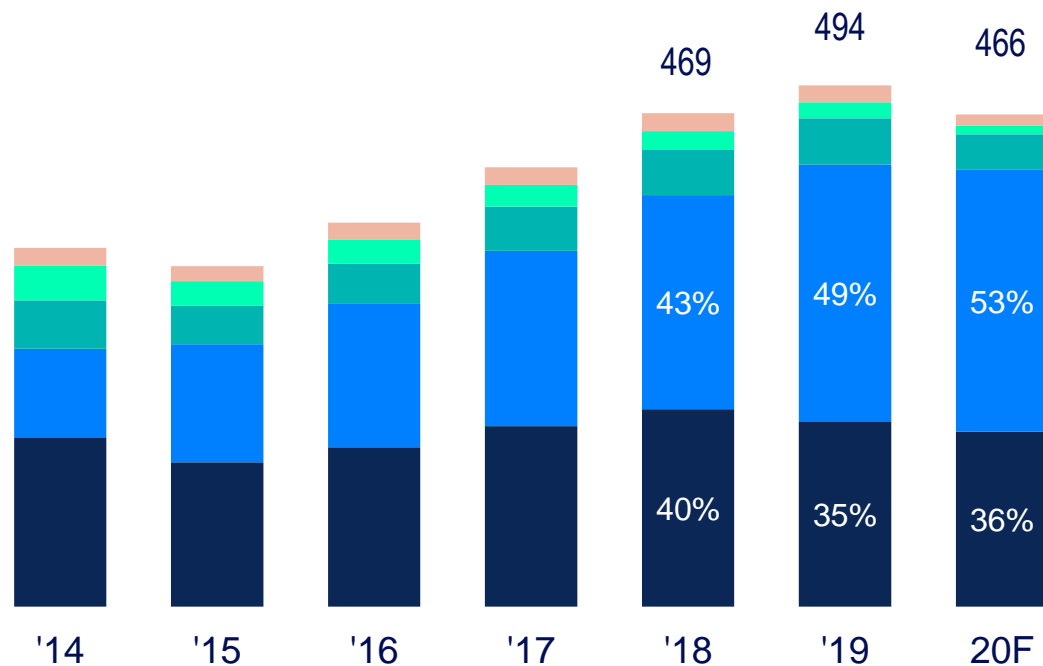
BRAND DAY 2020

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GROUPM 2020 MEDIA MARKET FORECAST

MARKET MEDIA MIX

■ TV ■ DIGITAL ■ OUT-OF-HOME ■ PRINT ■ RADIO



MARKET VOLUME DYNAMICS BY MEDIA

						Total
2019	-6	+20	0	-16	-5	+5
Q1'20	+3	+10	0	-22	-17	+4
Q2'20*	-22	-10	-63	-64	-56	-22
H1'20	-9	-1	-30	-44	-37	-9
'20F GroupM	-5	2	-23	-46	-33	-6

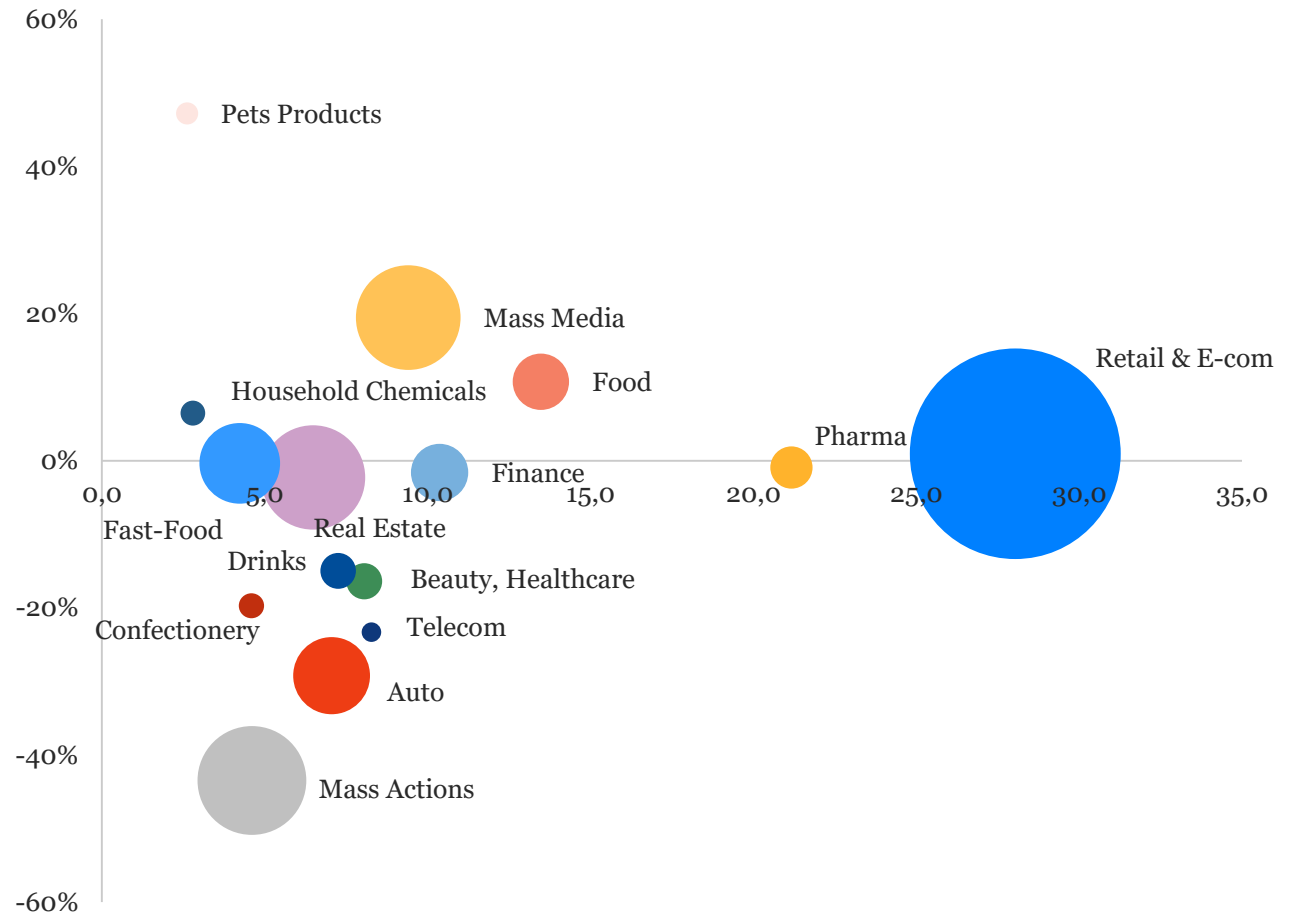
Source: Russian Association of Communication Agencies & IAB Russia.
Consolidated forecast of GroupM (Aug 2020). RUR bln, estimated net.

*Q2 2020 results by media were calculated as a difference between 1H and Q1 official data by RACA

ADVERTISERS SPENDS

PETS PRODUCTS & MEDIA SHOWS THE BIGGEST GROWTH

Advertiser	Budget		YoY%
	1-8'19	1-8'20	
Nestle	3.3	3.9	30
Pepsi Co	3.9	3.1	-40
MTS	2.8	2.7	-8
Sberbank	1.6	2.5	46
Leomax	1.5	2.5	53
Procter & Gamble	2.2	2.4	14
Reckitt Benckiser	2.0	2.4	17
Tele2	2.1	2.2	9
OTCPharm	2.0	2.1	4
L'Oreal	2.3	2.0	-16
Beeline	2.2	2.0	-11
Danone	1.1	1.8	39
McDonald's	2.0	1.8	-13
GSK Consumer Healthcare	2.0	1.7	-12
Miratorg	1.3	1.7	21



Source: MediaCom estimation based on Mediascope data. Jan-Aug'20 vs Jan-Aug'19. Budgets are shown in bln RUR. Spends on Video and Display in Internet are included. Spends on Cinema are excluded. Size of the bubble reflects number of active advertisers in category. Mass Media includes Resources in Internet