

# THIS YEAR NEXT YEAR

Maria Kolosova, CEO GroupM

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26 NOVEMBER 2020





**THIS YEAR**

# KEY FIGURES ON RUSSIAN ECONOMICS

**-3,9%**

**GDP**

**+3,8%**

**INFLATION**

**-3.0%**

**DISPOSABLE  
INCOME**

**-4,2%**

**RETAIL TURNOVER**

# KEY FIGURES ON RUSSIAN ECONOMICS

5.7%

Unemployment

62  
points

Consumer  
**confidence index** reached  
minimum for the  
last 15 years

+13%

Increase in  
**Russian credit debt** in 2020 (vs  
2019)

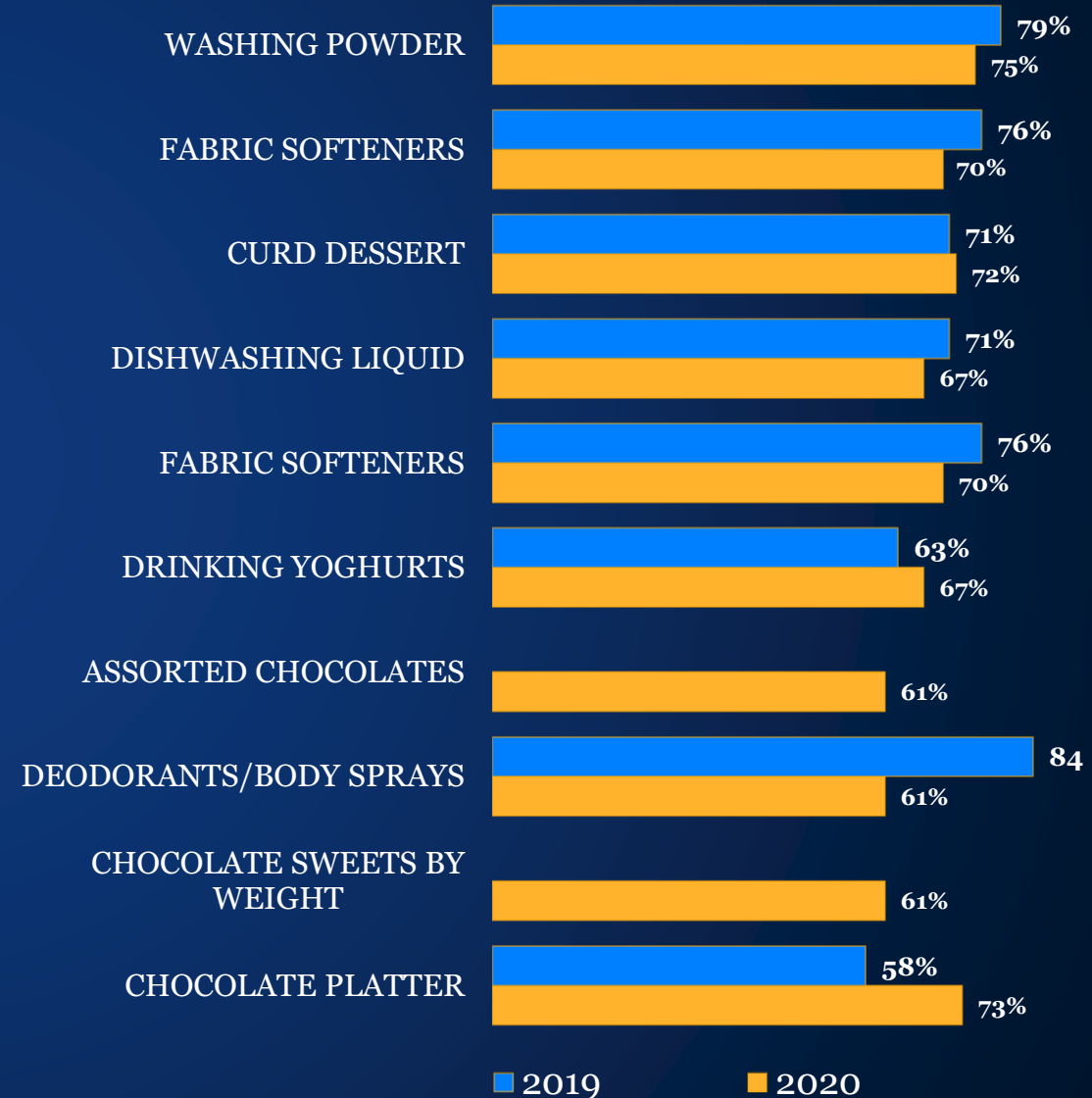
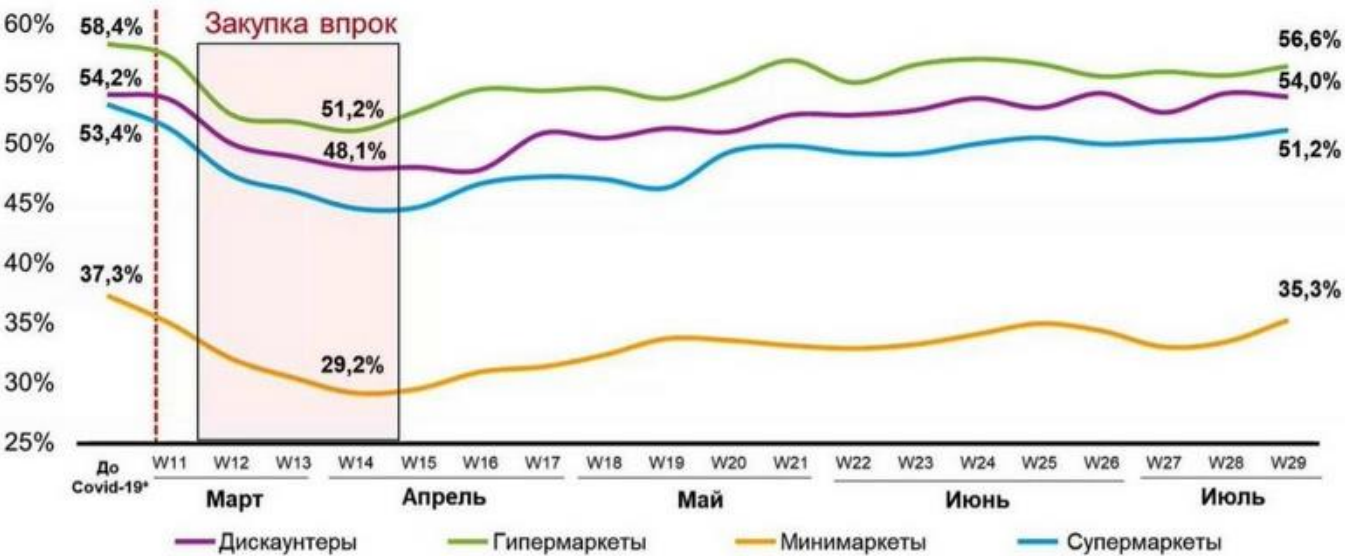


# SHARE OF SALES PROMOTIONS ARE STILL HIGH

TYNY 2020

## РОССИЯ: В 2020 ГОДУ ЗАКУПКА ВПРОК СПОСОБСТВОВАЛА КРАТКОСРОЧНОМУ СНИЖЕНИЮ ПРОМО-ДАВЛЕНИЯ

Доля промо-продаж в натуральном выражении

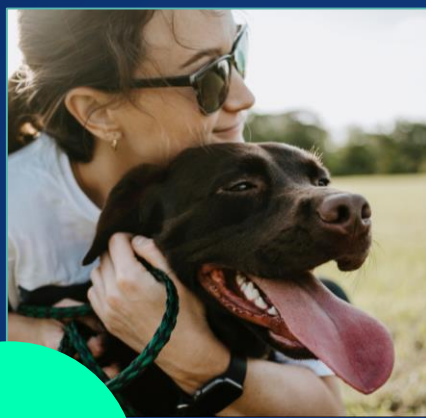


# NEW CONSUMER TRENDS AND HABITS



35%

Interest to **online education**



10%

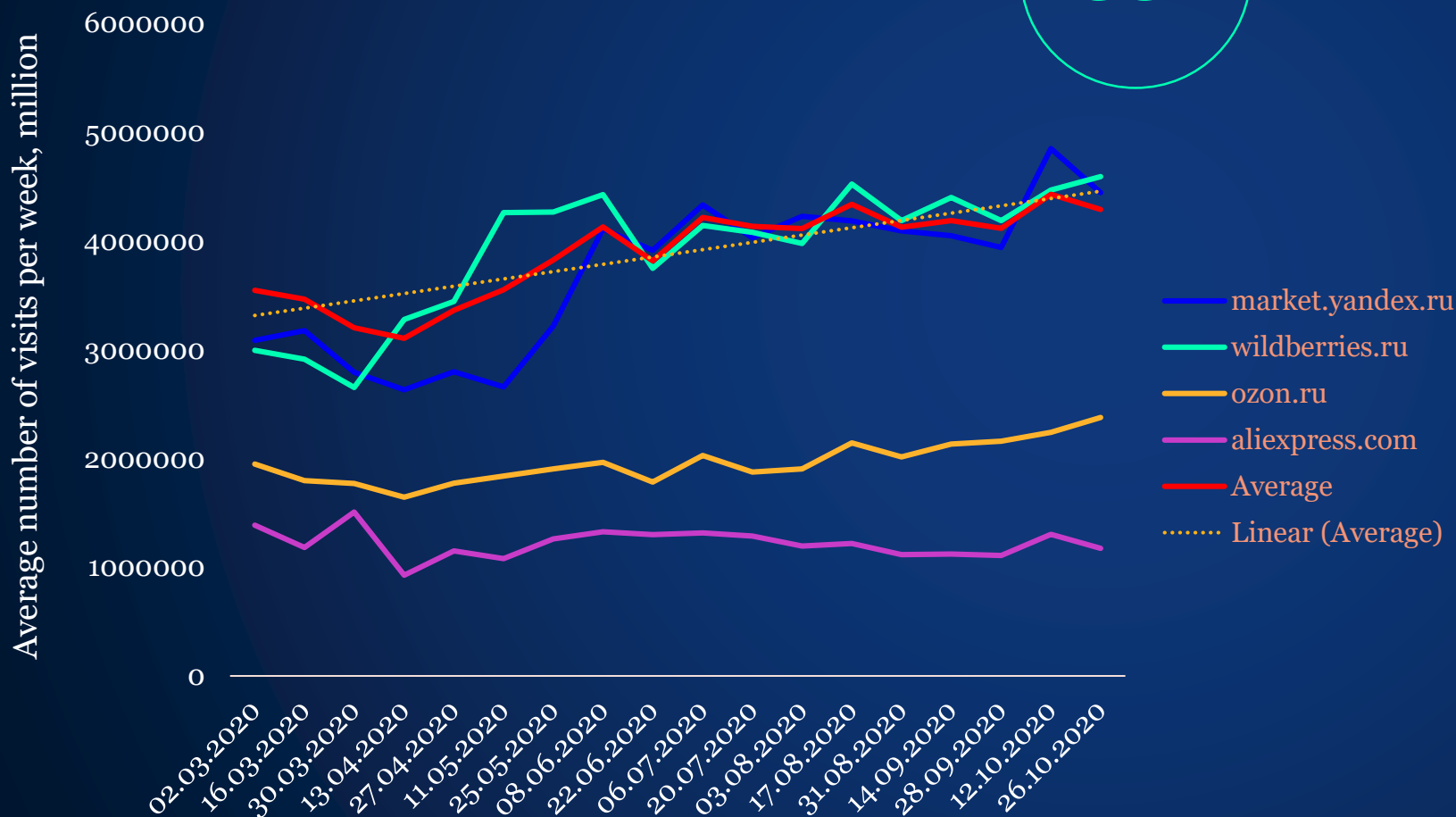
Households got a **new pet**



People **invest time and energy** in home improvement

# ECOM GROWTH IS THE BIGGEST TREND

+33%

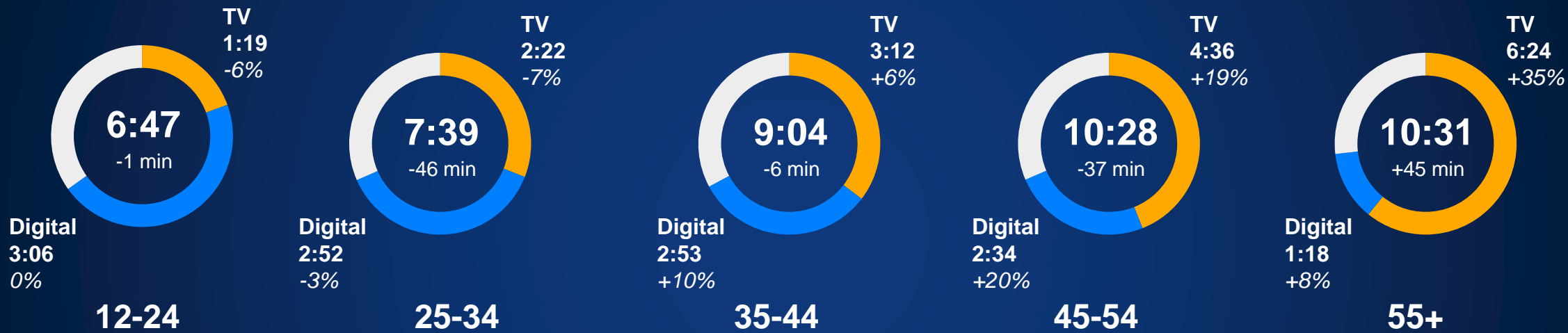


44%

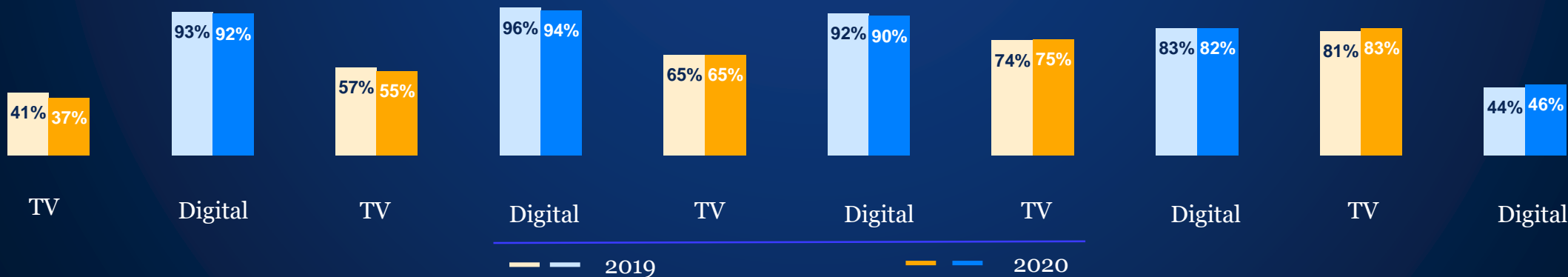
Russians **used product delivery** for the first time

# 2020 MEDIA HABITS

Time, h:min/day



Av daily reach %

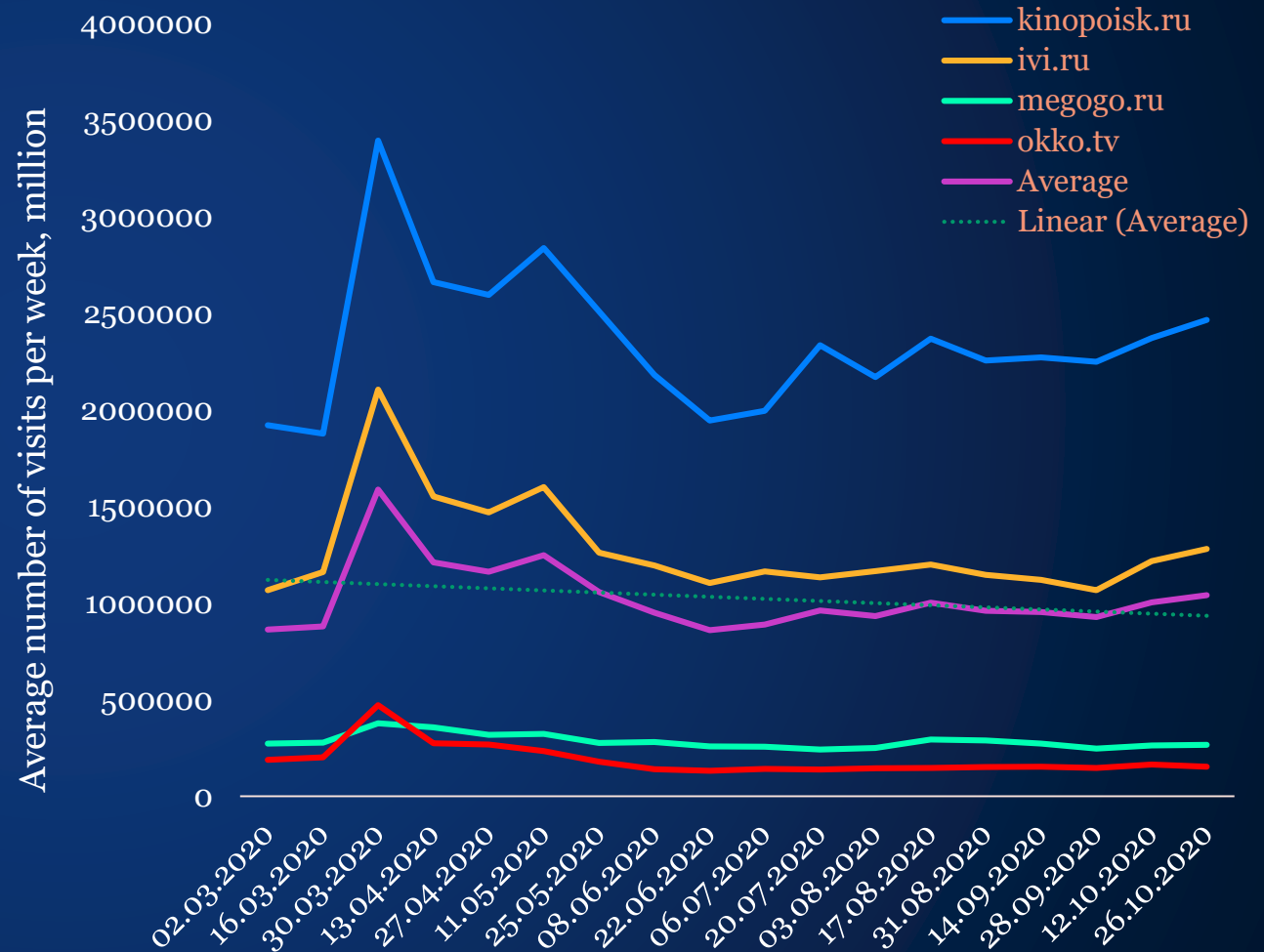
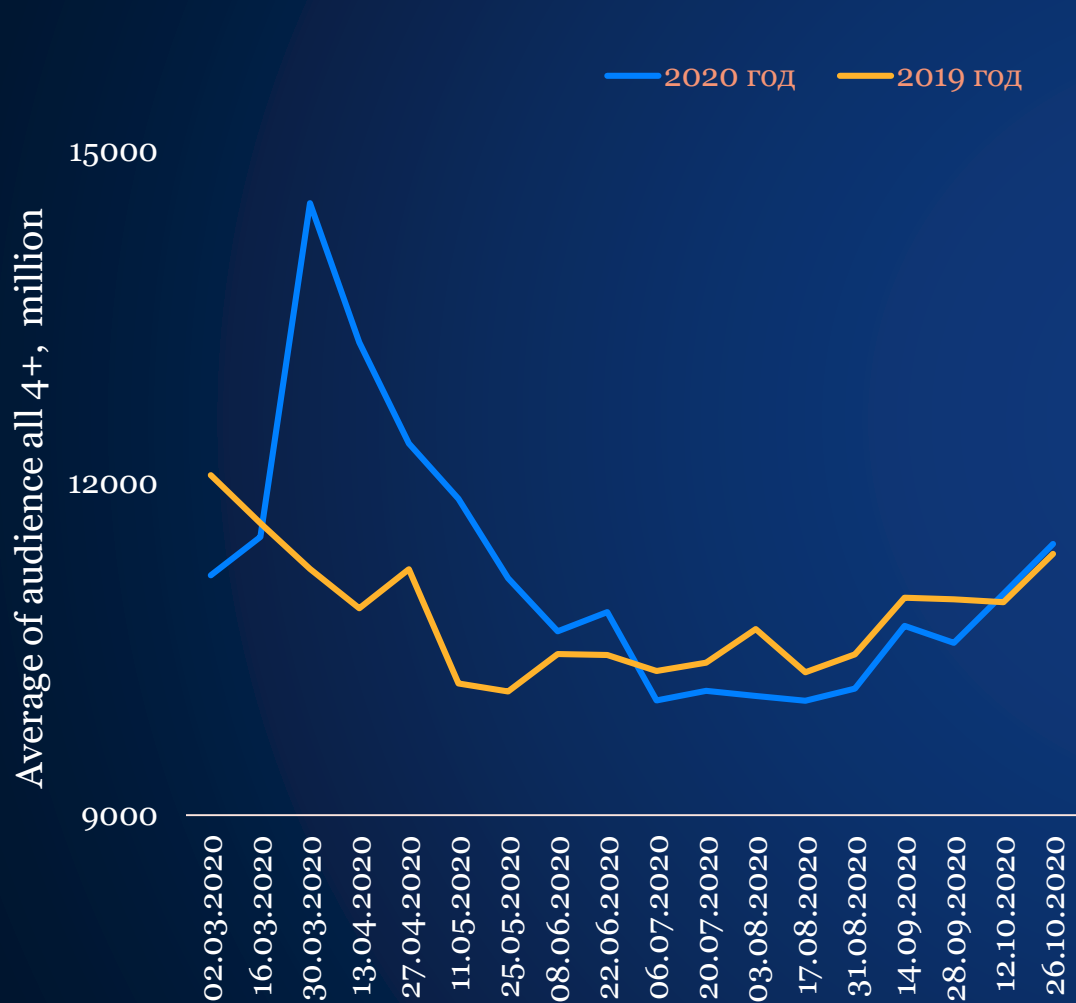


Source: TV Index, Russia cities 100k+, Jan-Sep 2020 vs Jan-Sep 2019, Total TV Reach%, ATV h:m (population). Digital: Web Index, Russia cities 100k+, Jun-Sep 2020 vs Jun-Sep 2019, Daily Reach%, Average Daily Duration Online (population). Other: Radio Index, Russia cities 100k+, Apr-Sep 2020 vs Apr-Sep 2019, Daily Reach%, TSL Daily Universe (population), Print: M'Index, Russia cities 100k+, 2019 Q4, Average Daily Time Spent (population).



# WATCHING MORE VIDEO, BOTH ONLINE AND ON TV

TYNY 2020



Source: Mediascope TV Index, Russia 100+, <https://wmpredictor.ru/media>

Source: SimilarWeb, Russia, <https://wmpredictor.ru/media>

# LIGHT AND NON-VIEWERS STAYED ON TV AFTER QUARANTINE AND ARE LIKELY TO CONTINUE WATCHING IT

TYNY 2020

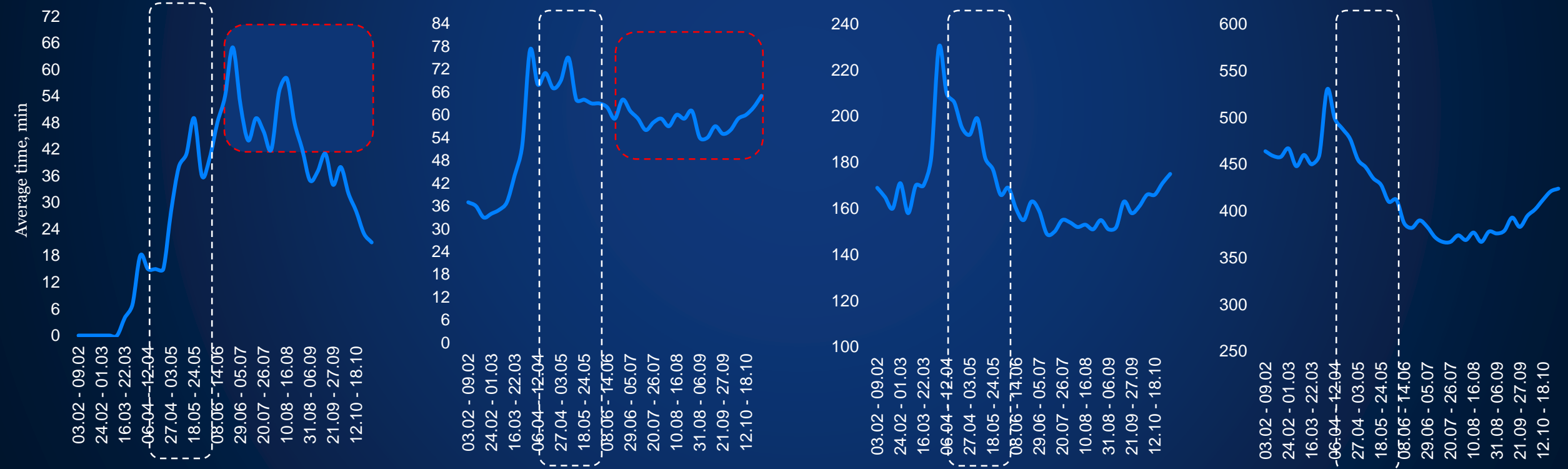
TV

Didn't watch TV

LIGHT-viewers

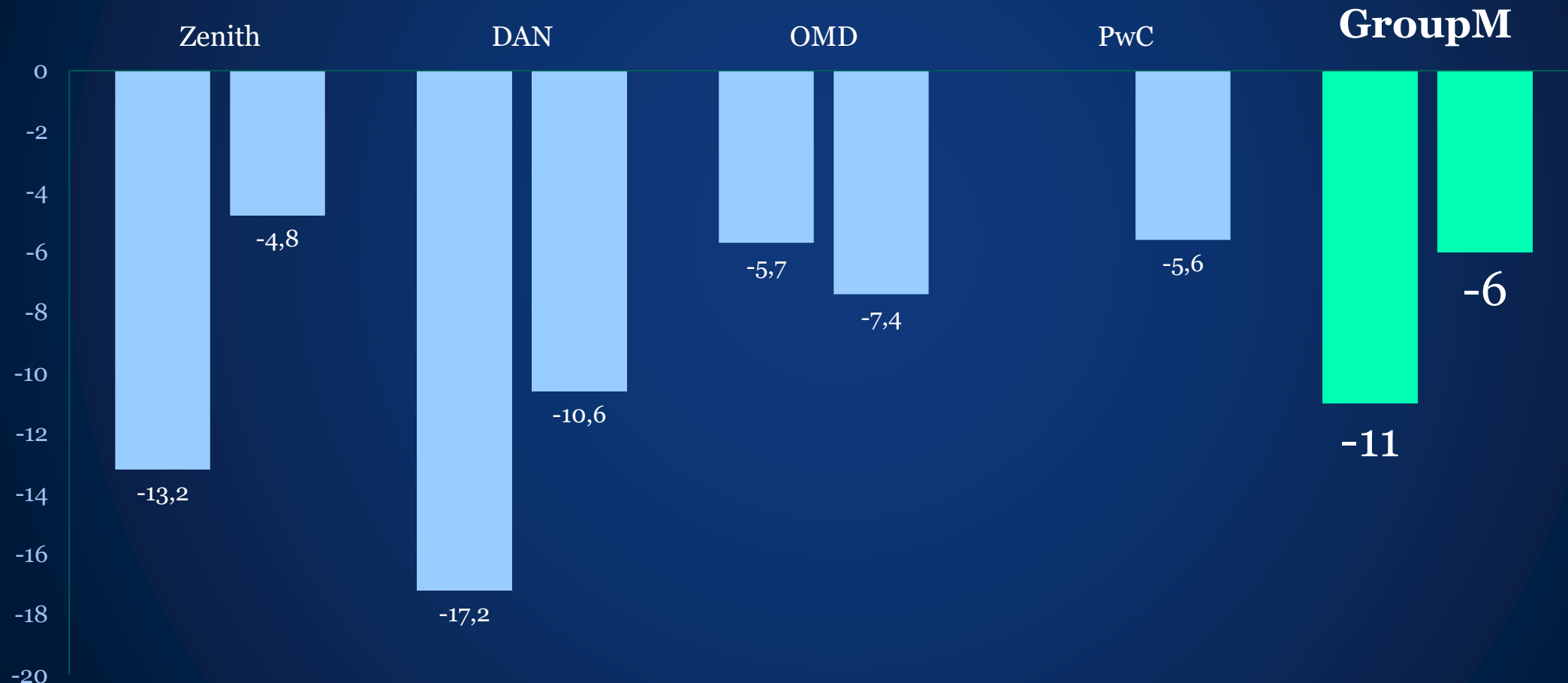
MEDIUM-viewers

HEAVY-viewers



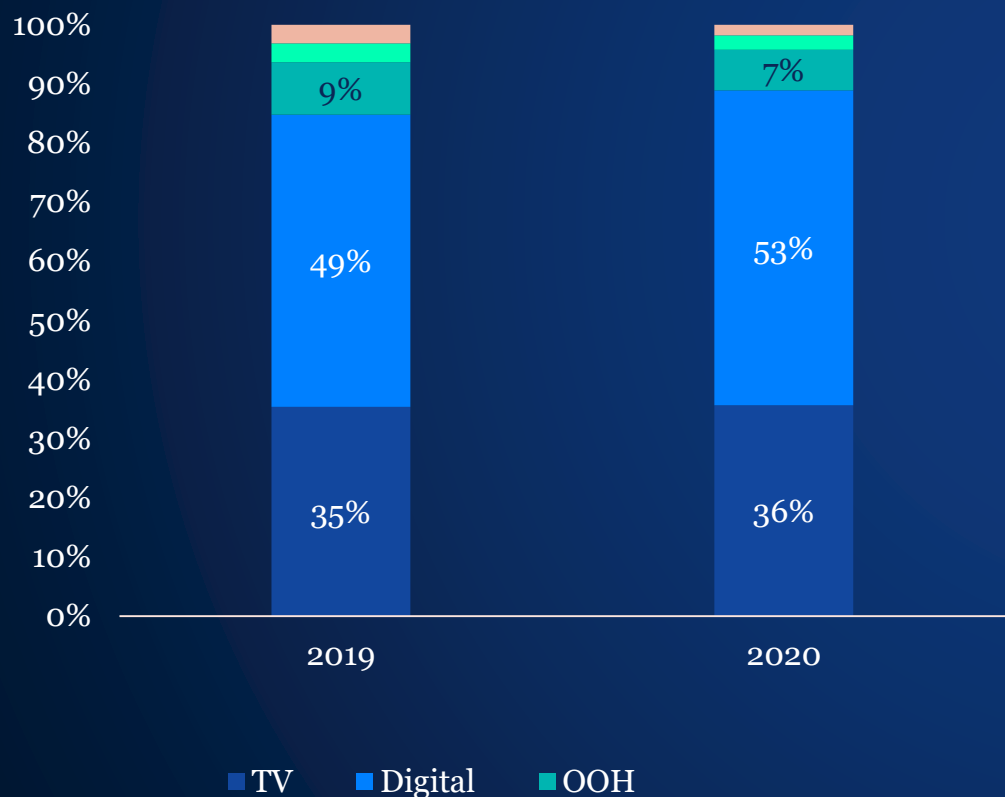
# 2020 ADVERTISING MARKET LOOKS BETTER THAN INITIALLY FORECASTED

TYNY 2020

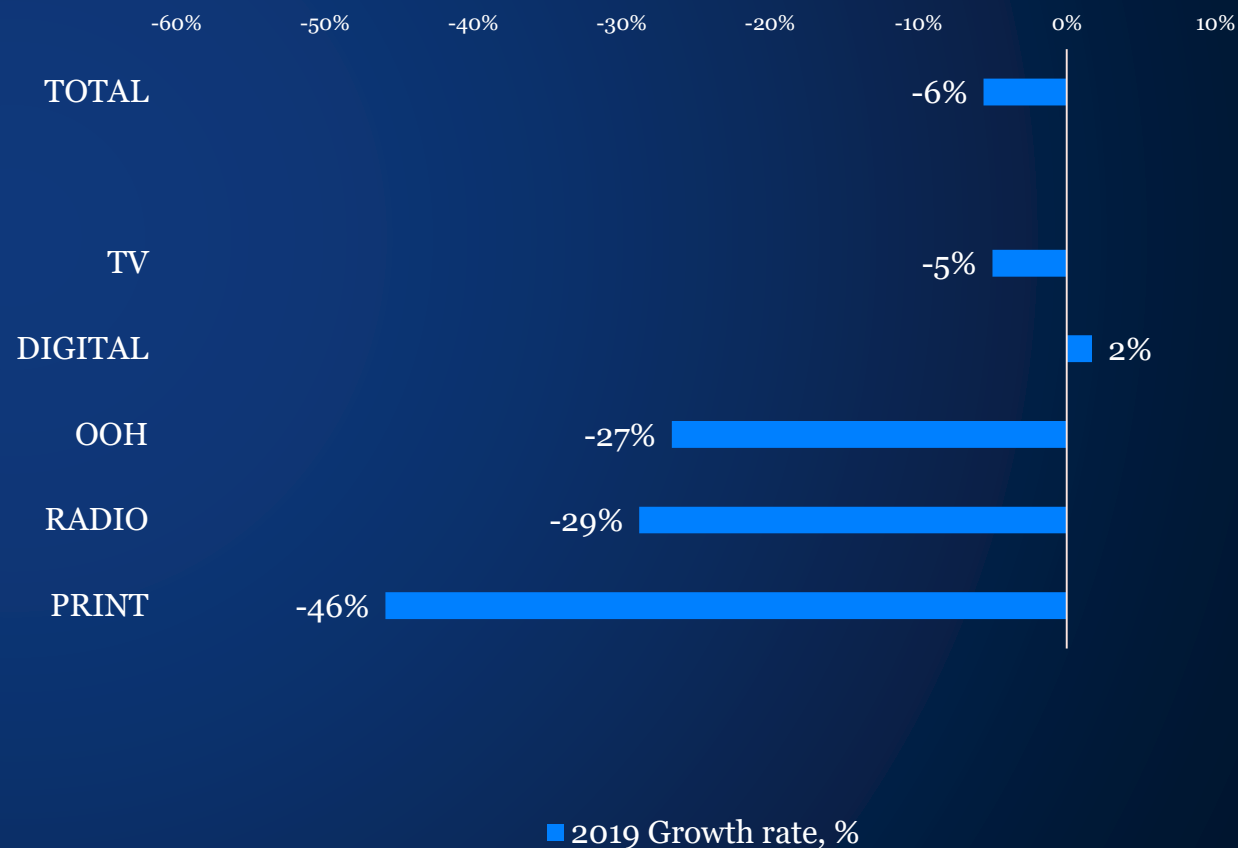


# DIGITAL AND TV THE LEAST AFFECTED

MEDIA MIX 2019-2020



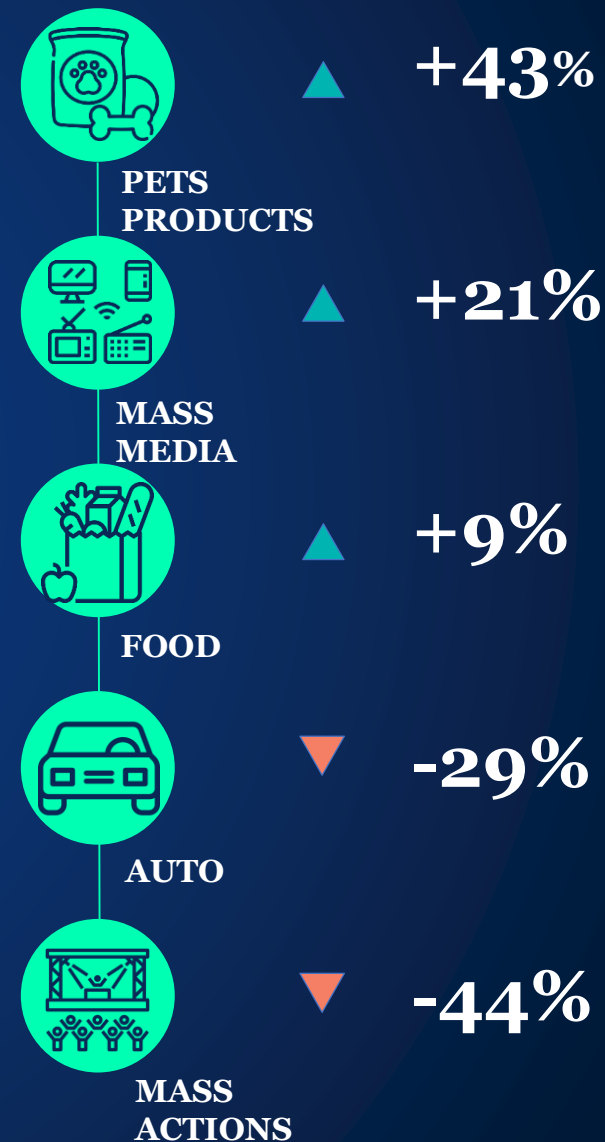
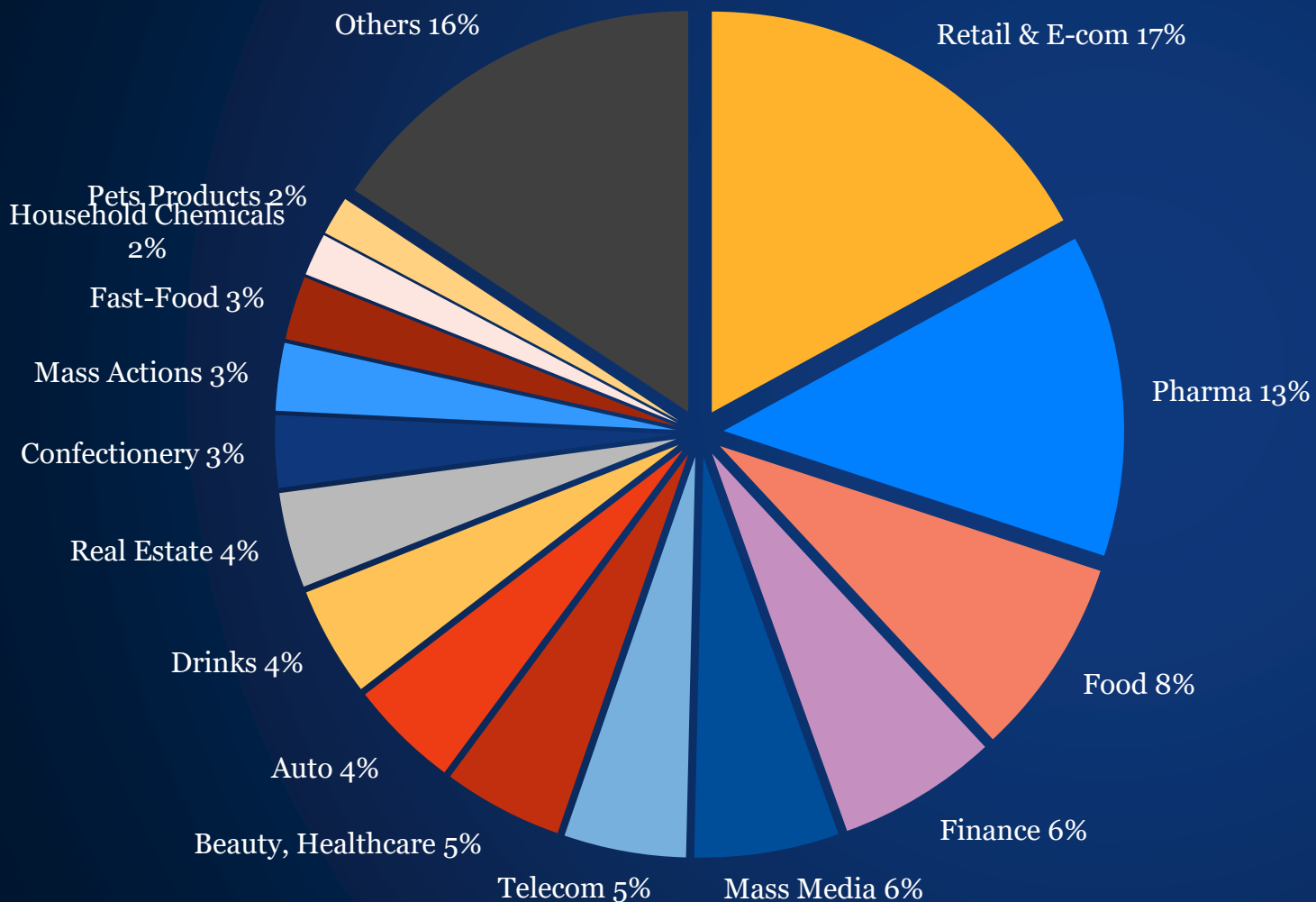
2021-2022 DYNAMICS BY MEDIA





# MEDIA MARKET SPLIT BY CATEGORIES

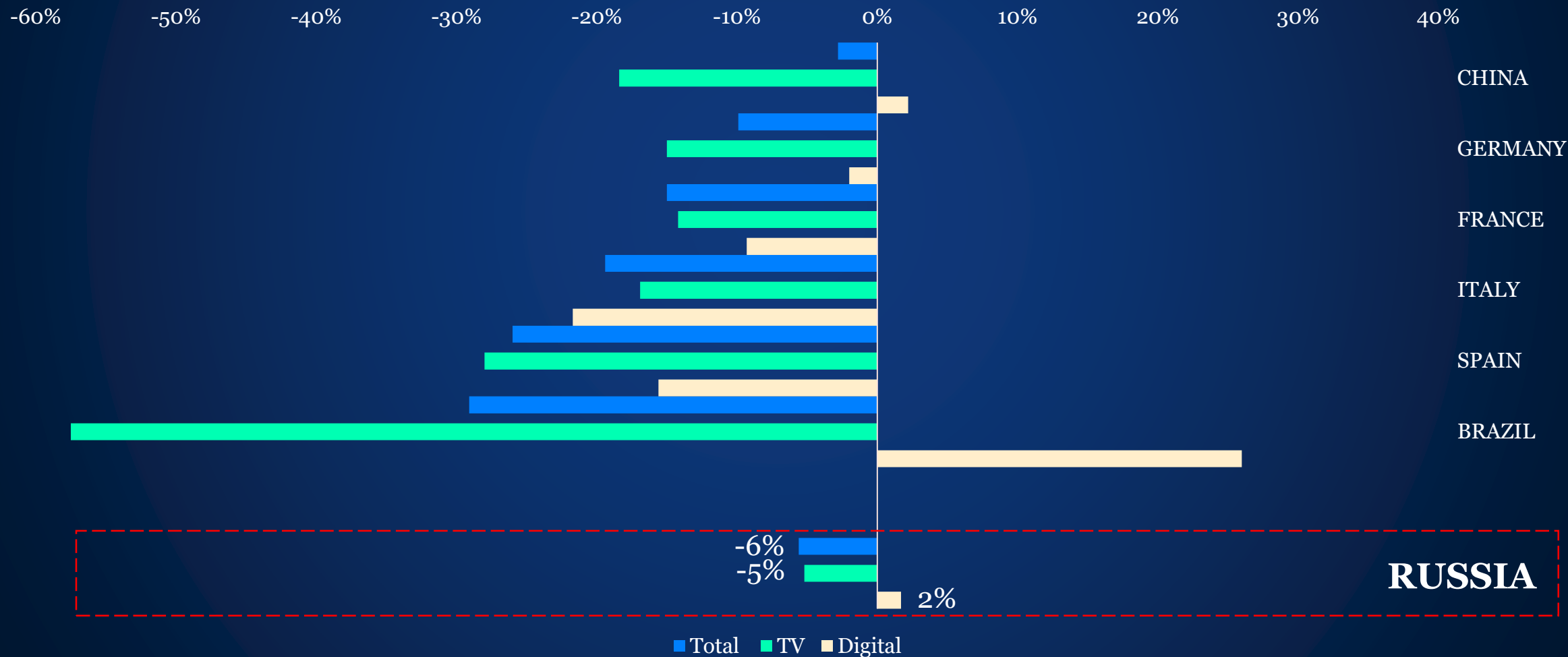
TYNY 2020



Source: GroupM estimation on the basis of Mediascope data. Jan-Sep'20 vs Jan-Sep'19. Mass Media includes Resources in Internet

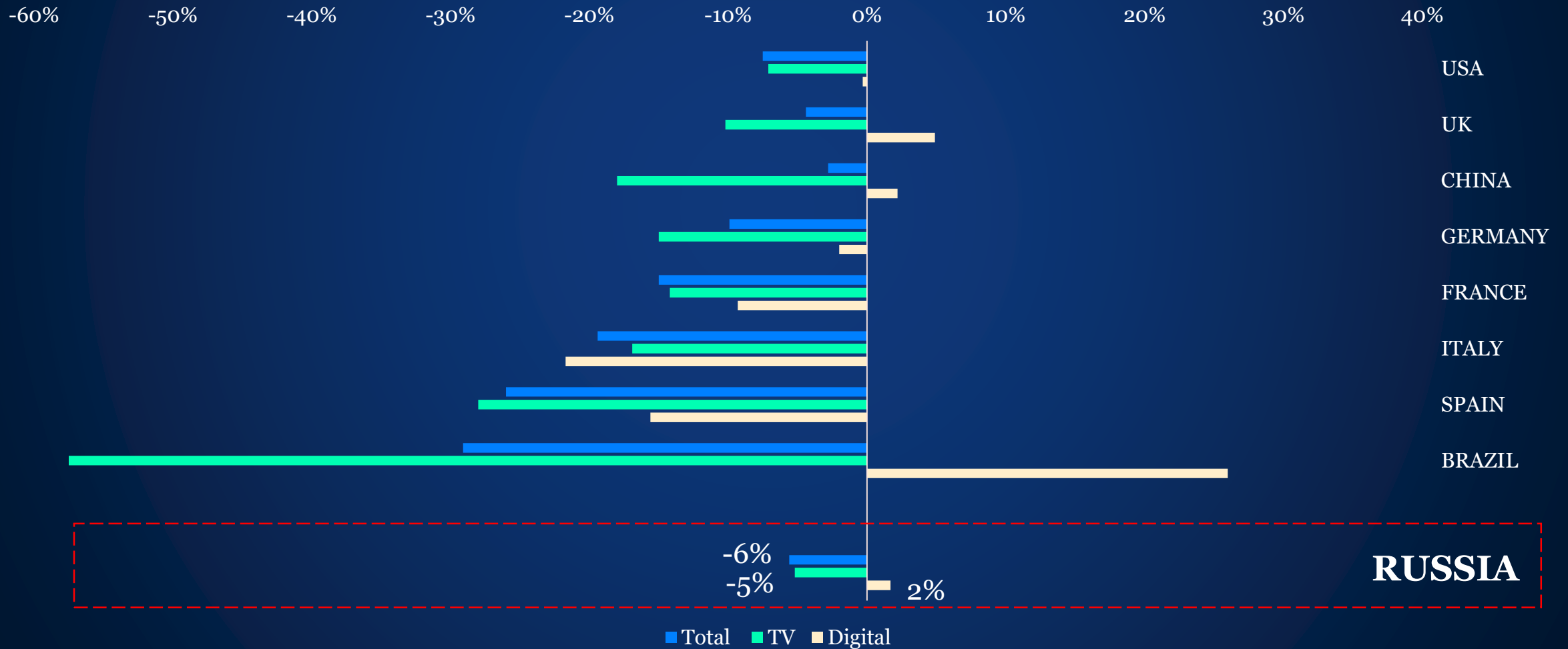
# RUSSIA IS IN BETTER SHAPE

2020 MEDIA DYNAMICS



# RUSSIA IS IN BETTER SHAPE

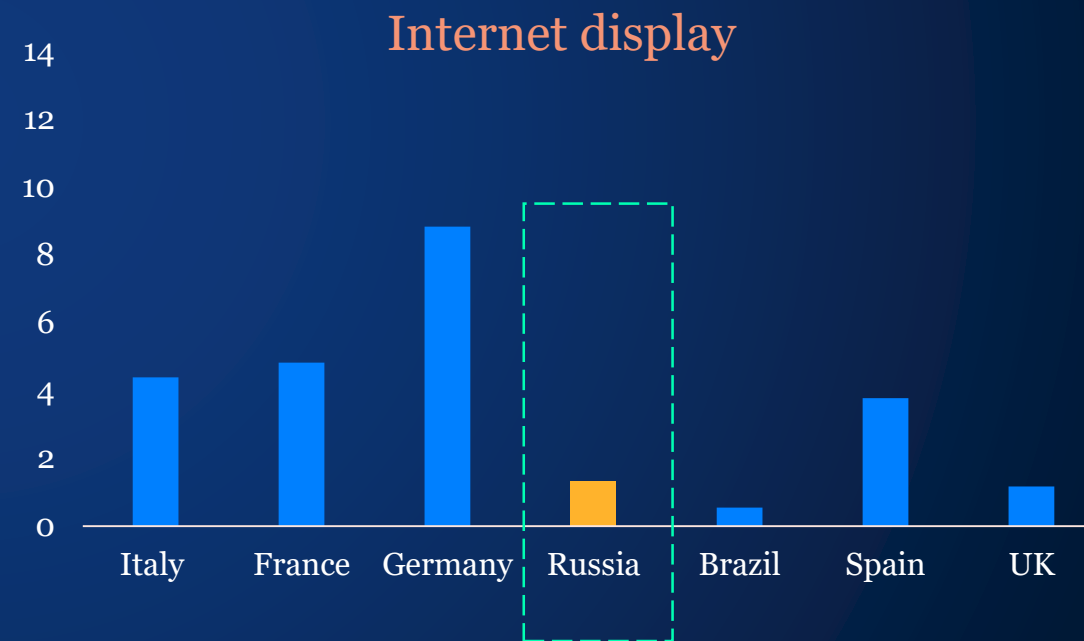
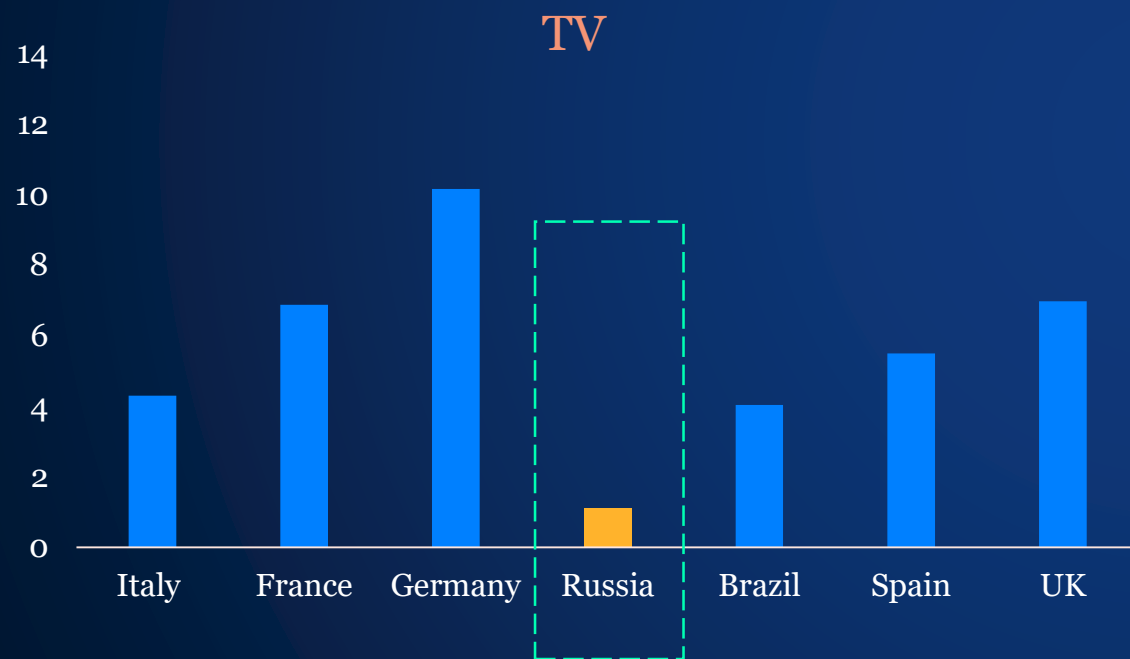
2020 MEDIA DYNAMICS



# RUSSIA REMAINS A GOOD PLACE TO INVEST



## COST PER THOUSAND, ADULTS



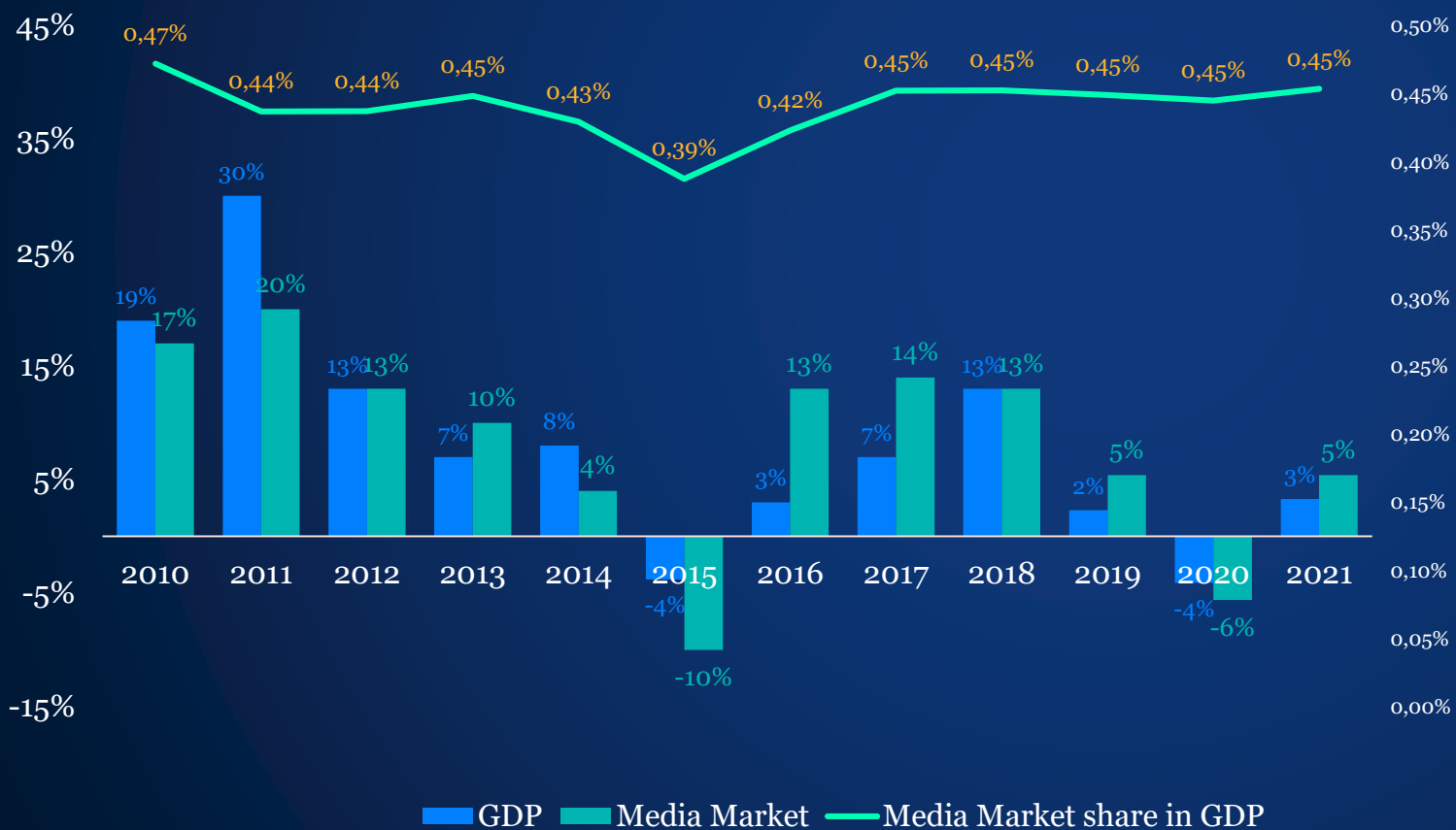


**NEXT YEAR**

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# GROUPM EXPECTS ADVERTISING MARKET TO GROW 5% IN 2021



**+3.3%**

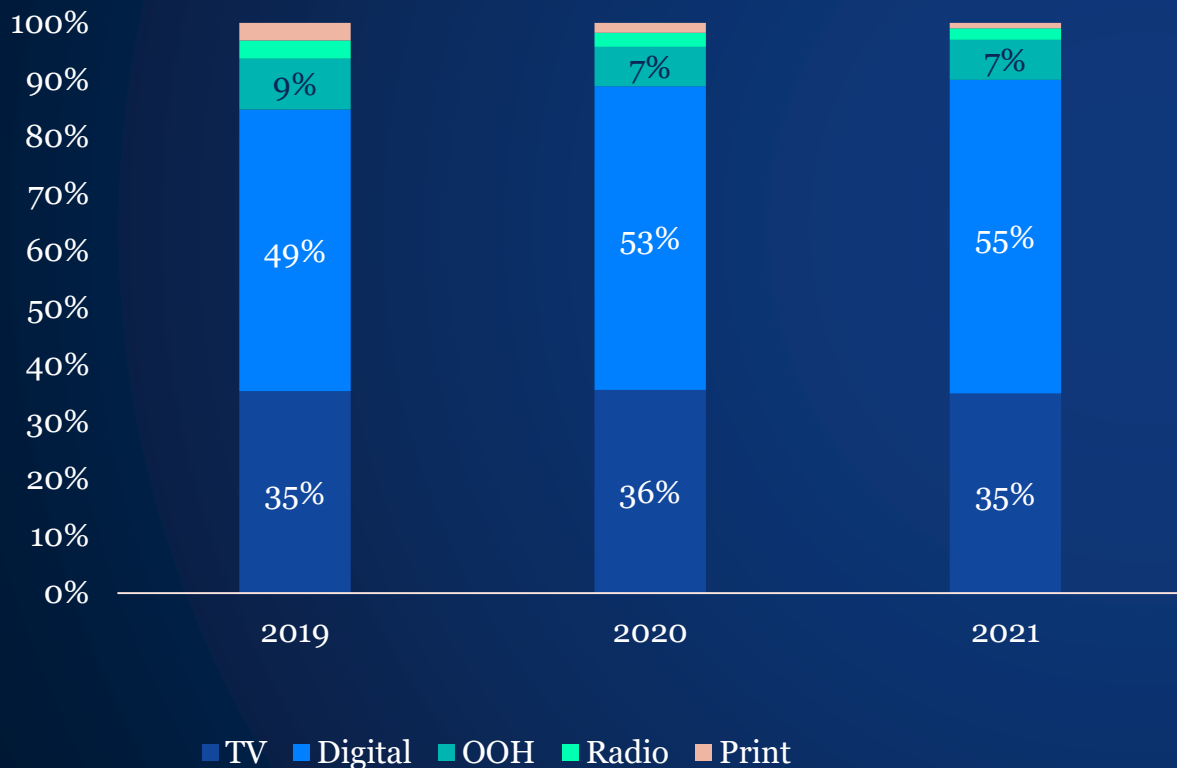
GDP 2021F

**+5%**

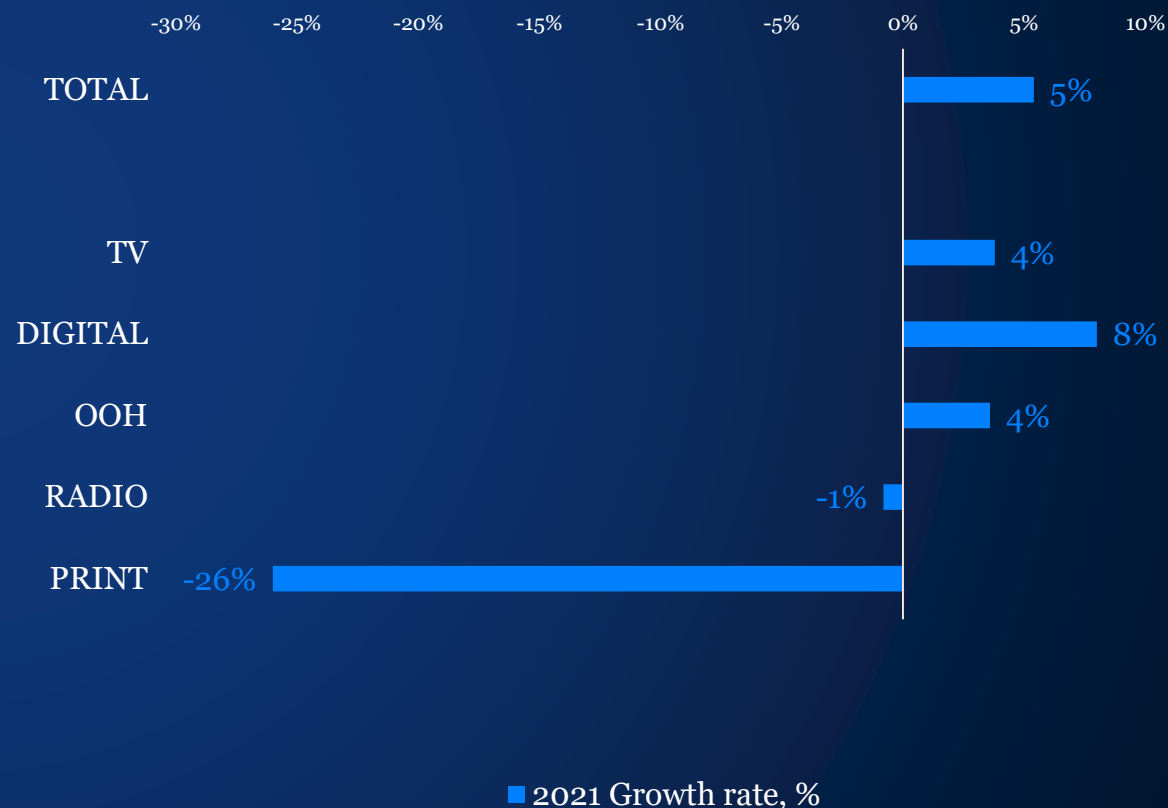
GroupM MM 2021F

# DIGITAL, TV & OOH ARE KEY DRIVERS OF GROWTH IN 2021

MEDIA MIX 2019-2021



2021 DYNAMICS BY MEDIA



# GROWING CATEGORIES



**Pet food**



**Finance**

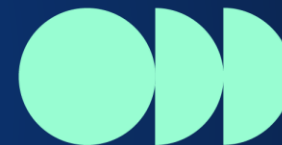


**Online services**



YEAR THIS YEAR  
26.11  
YEAR NEXT

# ENGINEERING GROWTH



group<sup>m</sup> MINDSHARE  MEDIACOM Wavemaker

# **AGENDA TYNY 2020**

**mBlock 0: Growth Priorities 2021**

**mBlock 1: Business Core – Focus of Growth**

**mBlock 2: Technologies – Rapid Growth Driver**

**mBlock 3: Speed and Agility – Growth Accelerators**

**mBlock 4: Diversity and Inclusion – Sustainable Growth**

**THANK YOU**

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