

THIS YEAR NEXT YEAR

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26 NOVEMBER 2020





THIS YEAR

KEY FIGURES ON RUSSIAN ECONOMICS



GDP



INFLATION



**DISPOSABLE
INCOME**



RETAIL TURNOVER

KEY FIGURES ON RUSSIAN ECONOMICS

5.7%

Unemployment

62
points

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

+13%

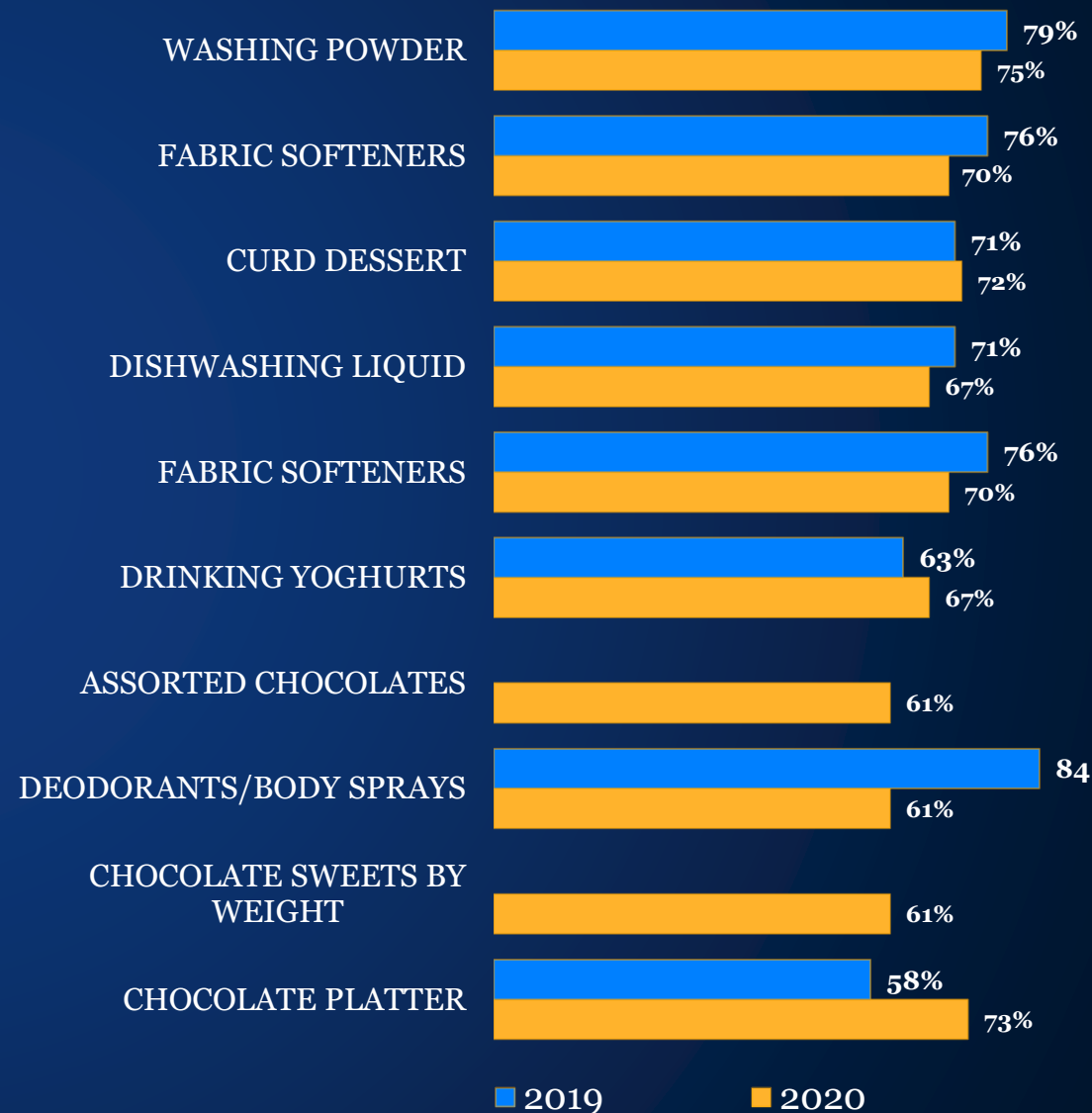
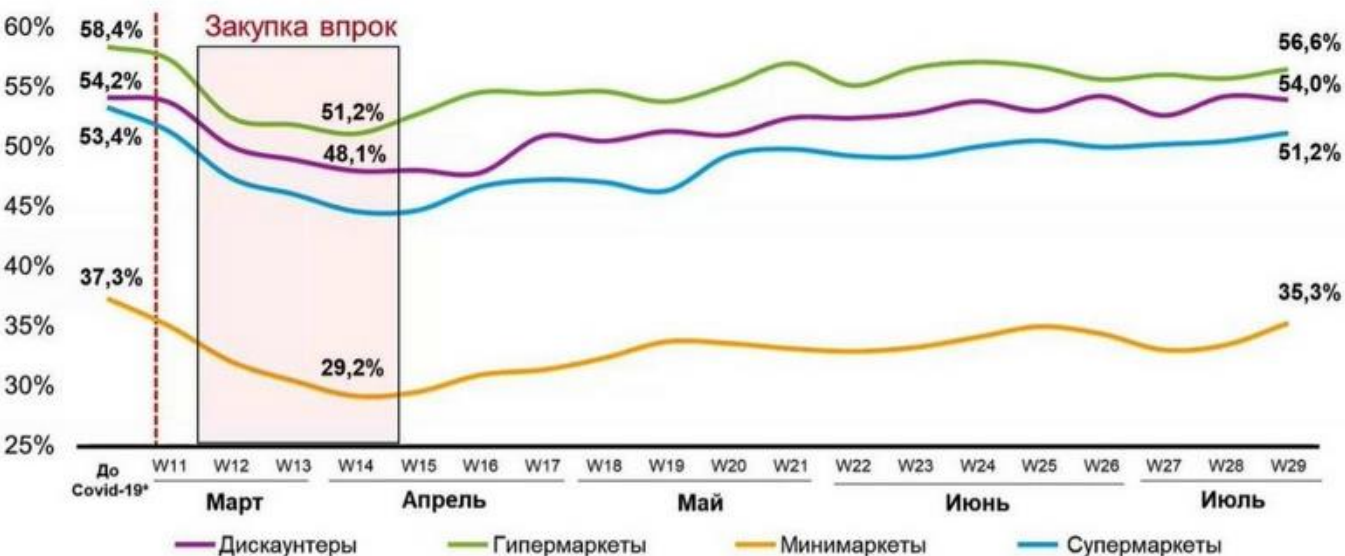
Increase in **Russian credit debt** in 2020 (vs 2019)

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

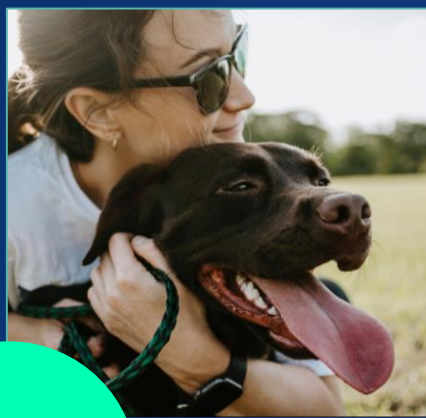


NEW CONSUMER TRENDS AND HABITS



35%

Interest to **online education**



10%

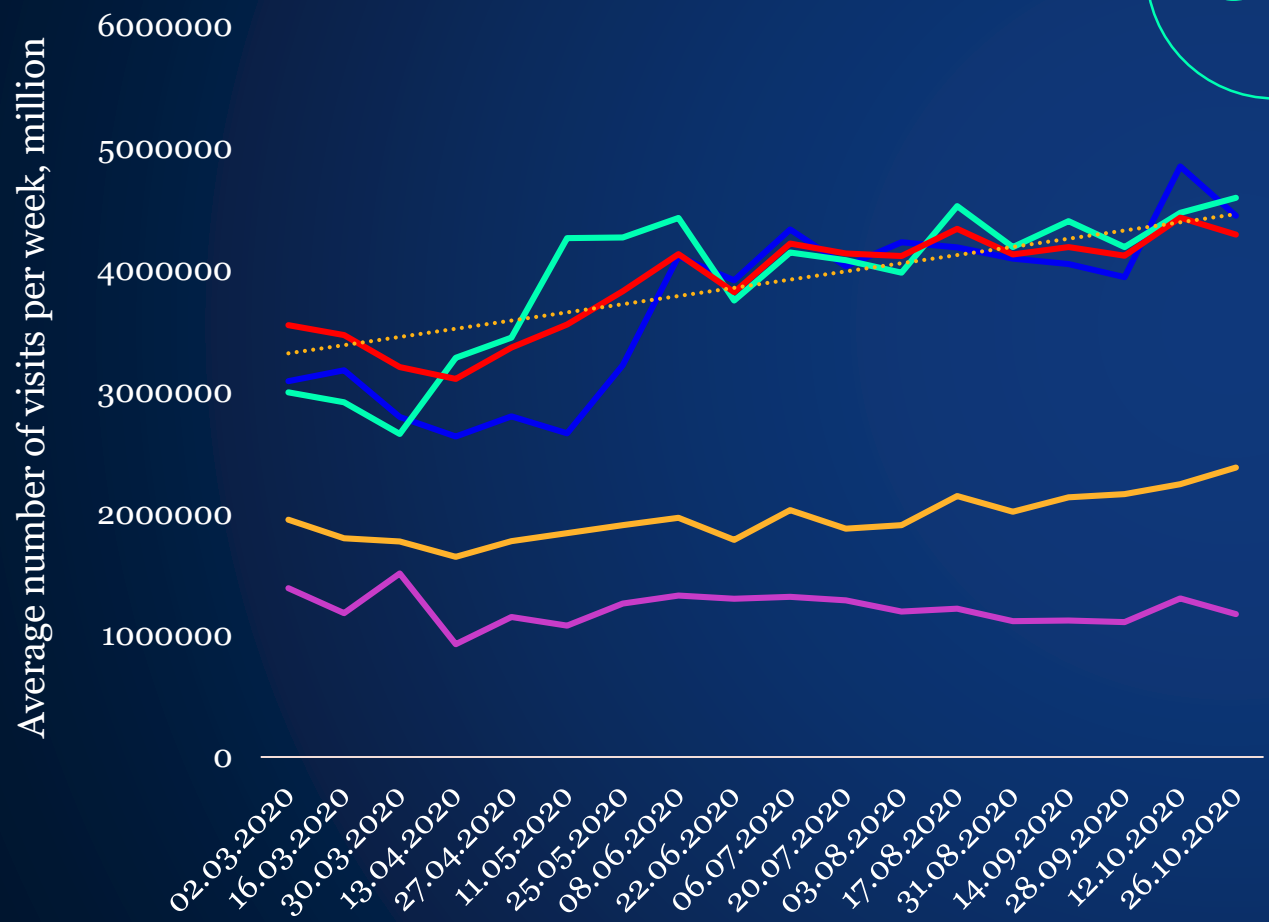
Households got a **new pet**



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

ECOM GROWTH IS THE BIGGEST TREND

+33%

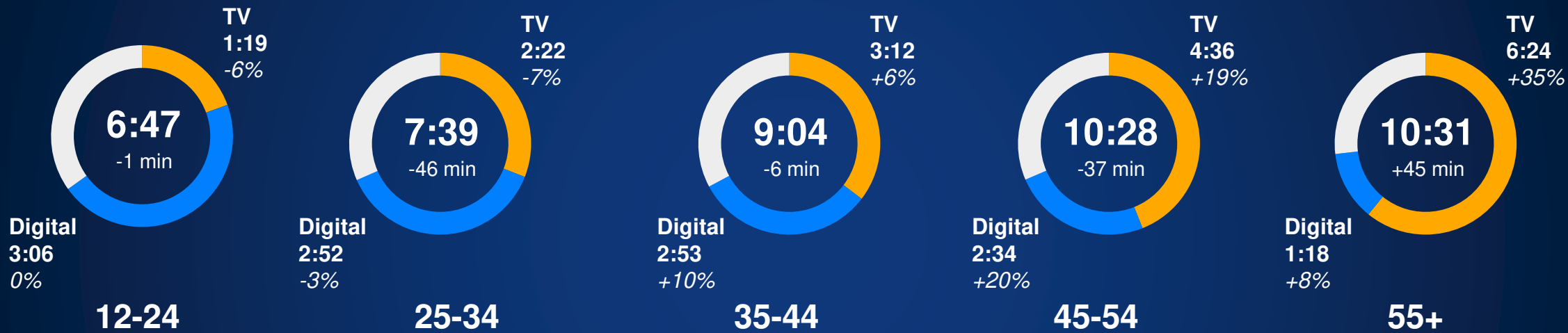


44%

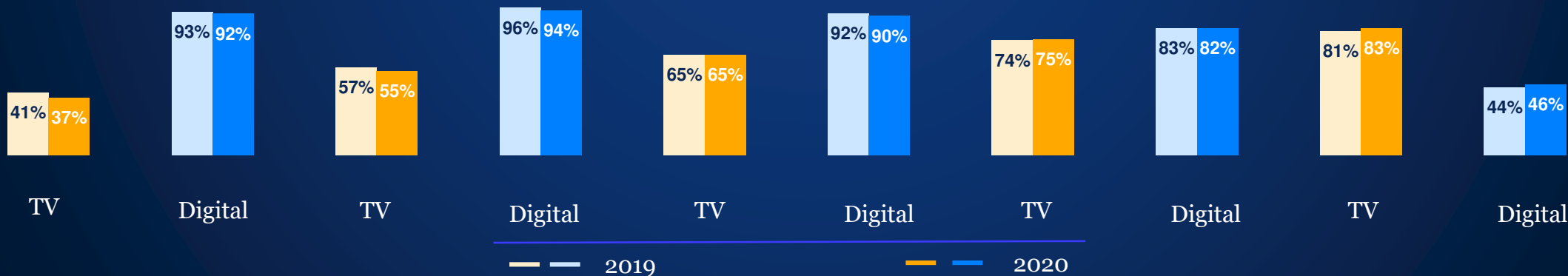
Russians **used product delivery** for the first time

2020 MEDIA HABITS

Time, h:min/day



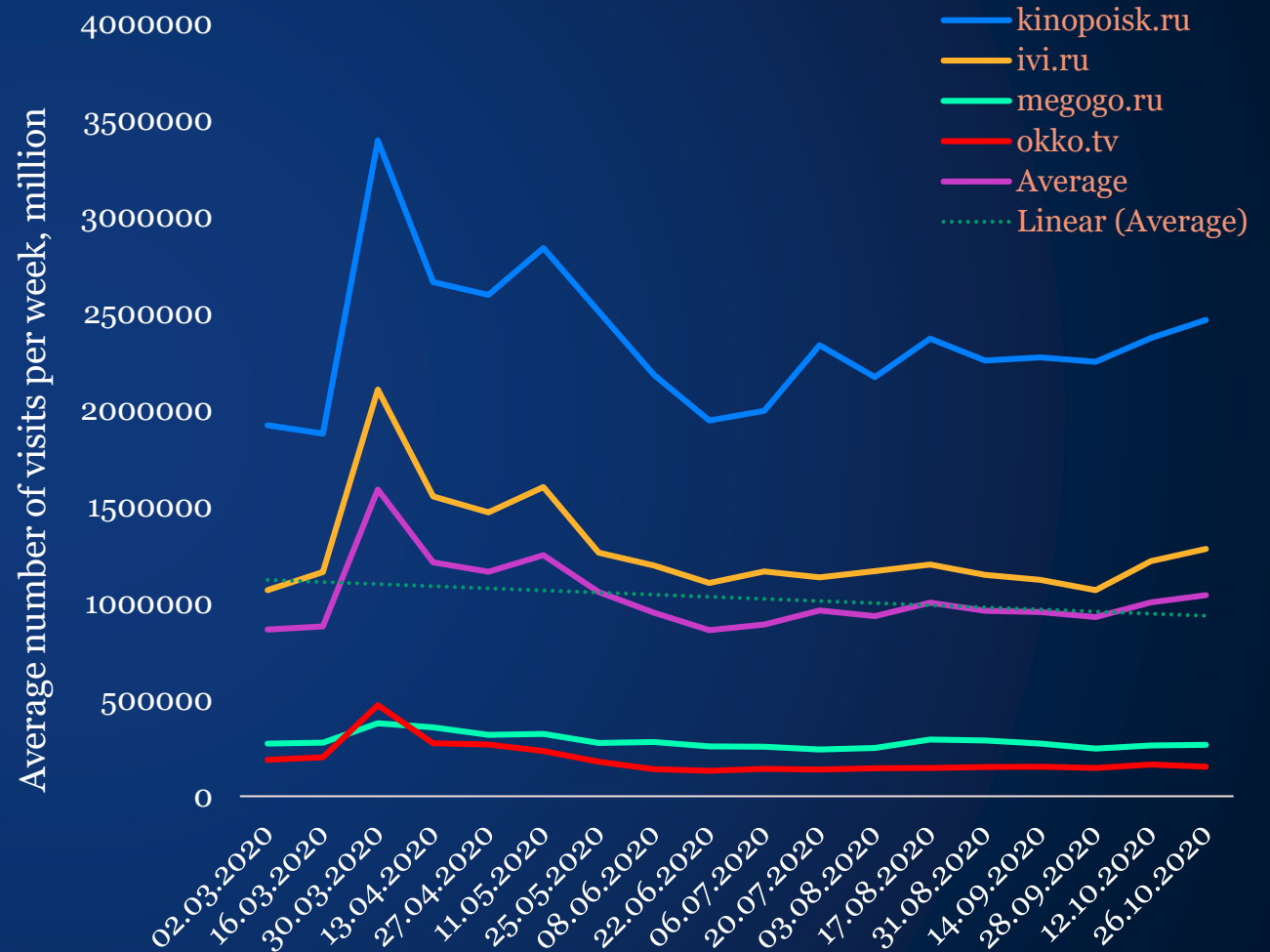
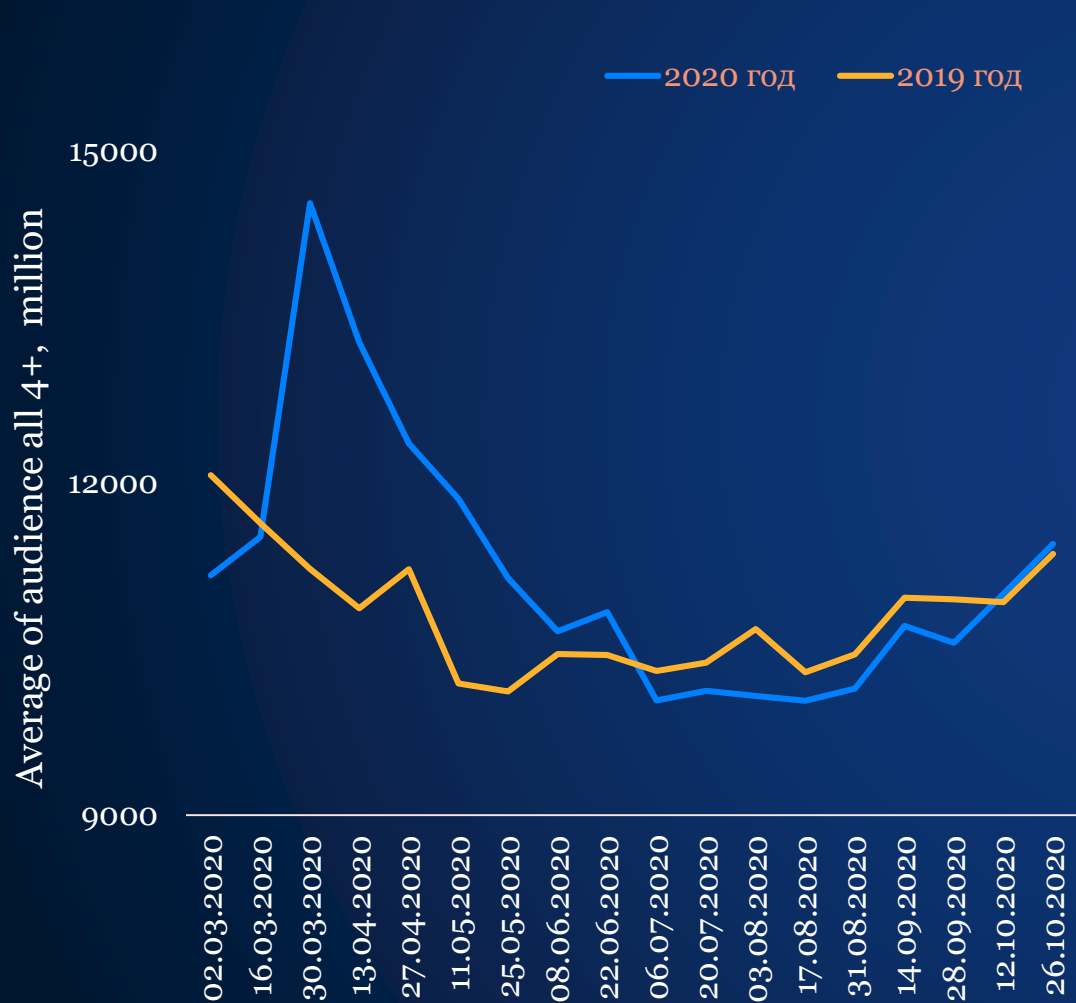
Av daily reach %



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

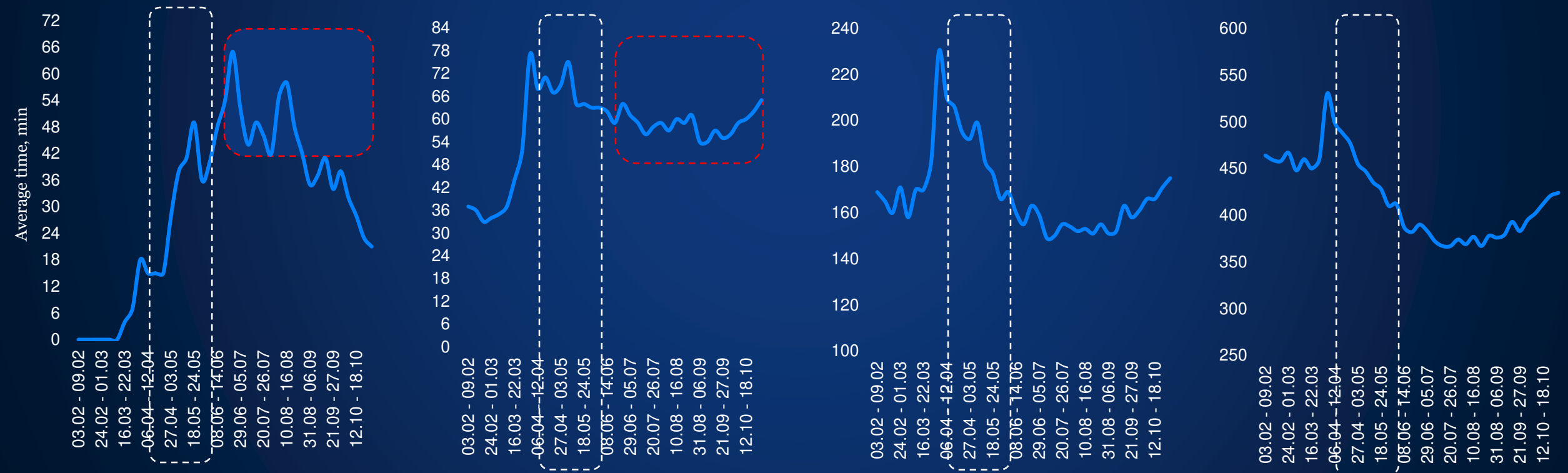
TV

Didn't watch TV

LIGHT-viewers

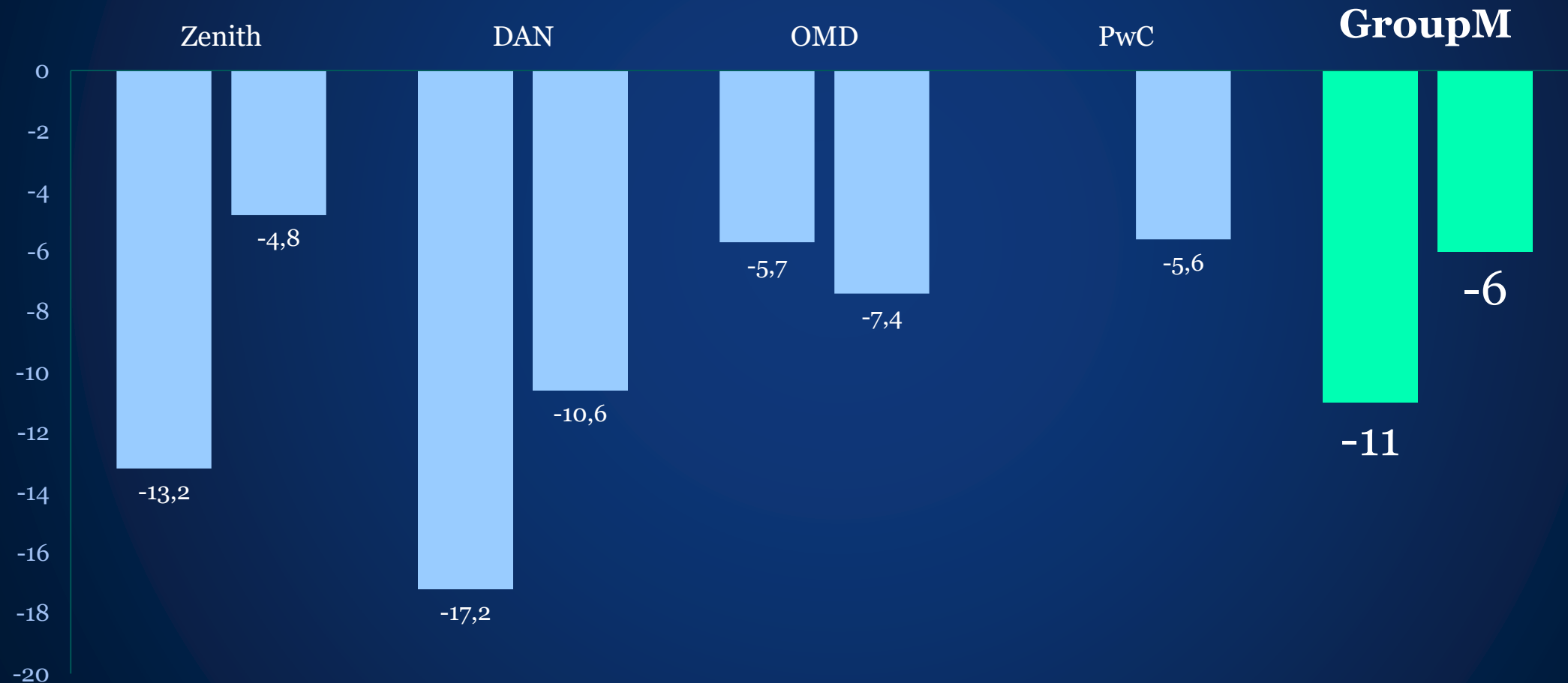
MEDIUM-viewers

HEAVY-viewers



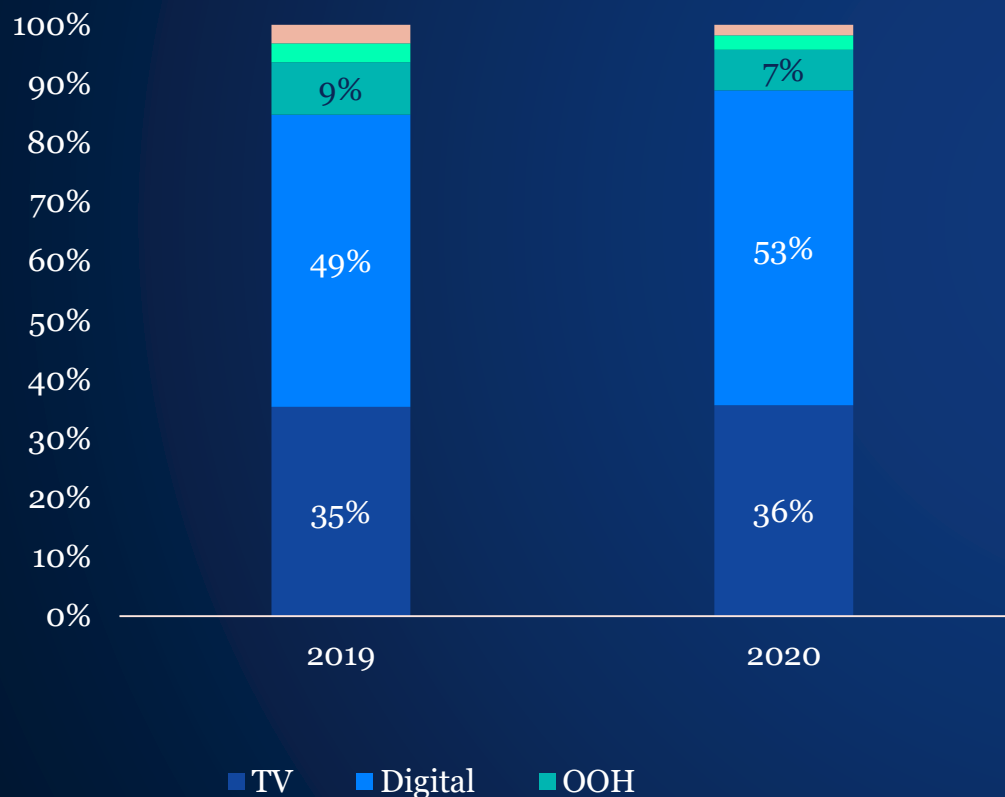
2020 ADVERTISING MARKET LOOKS BETTER THAN INITIALLY FORECASTED

TYNY 2020

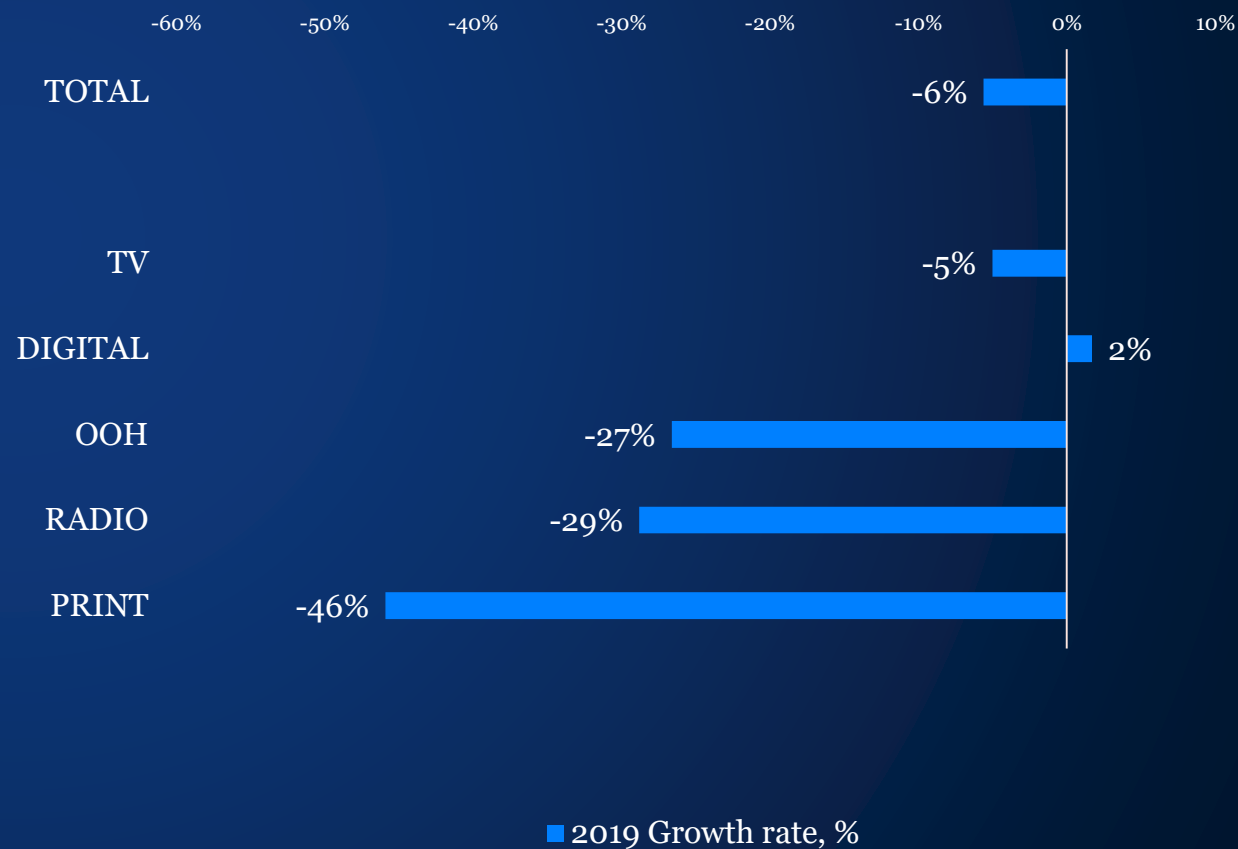


DIGITAL AND TV THE LEAST AFFECTED

MEDIA MIX 2019-2020

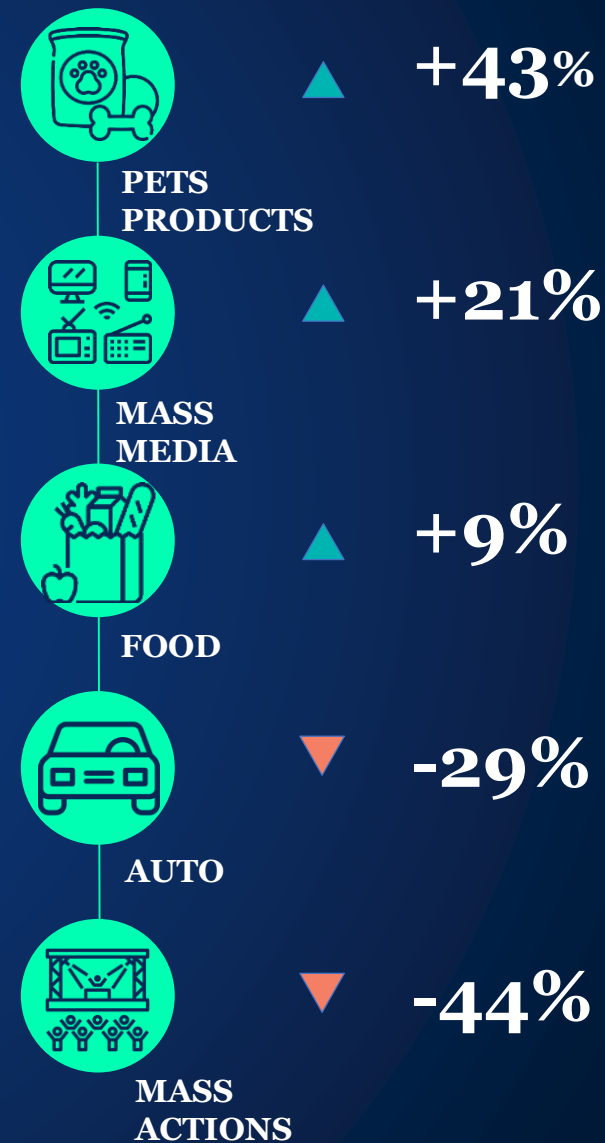
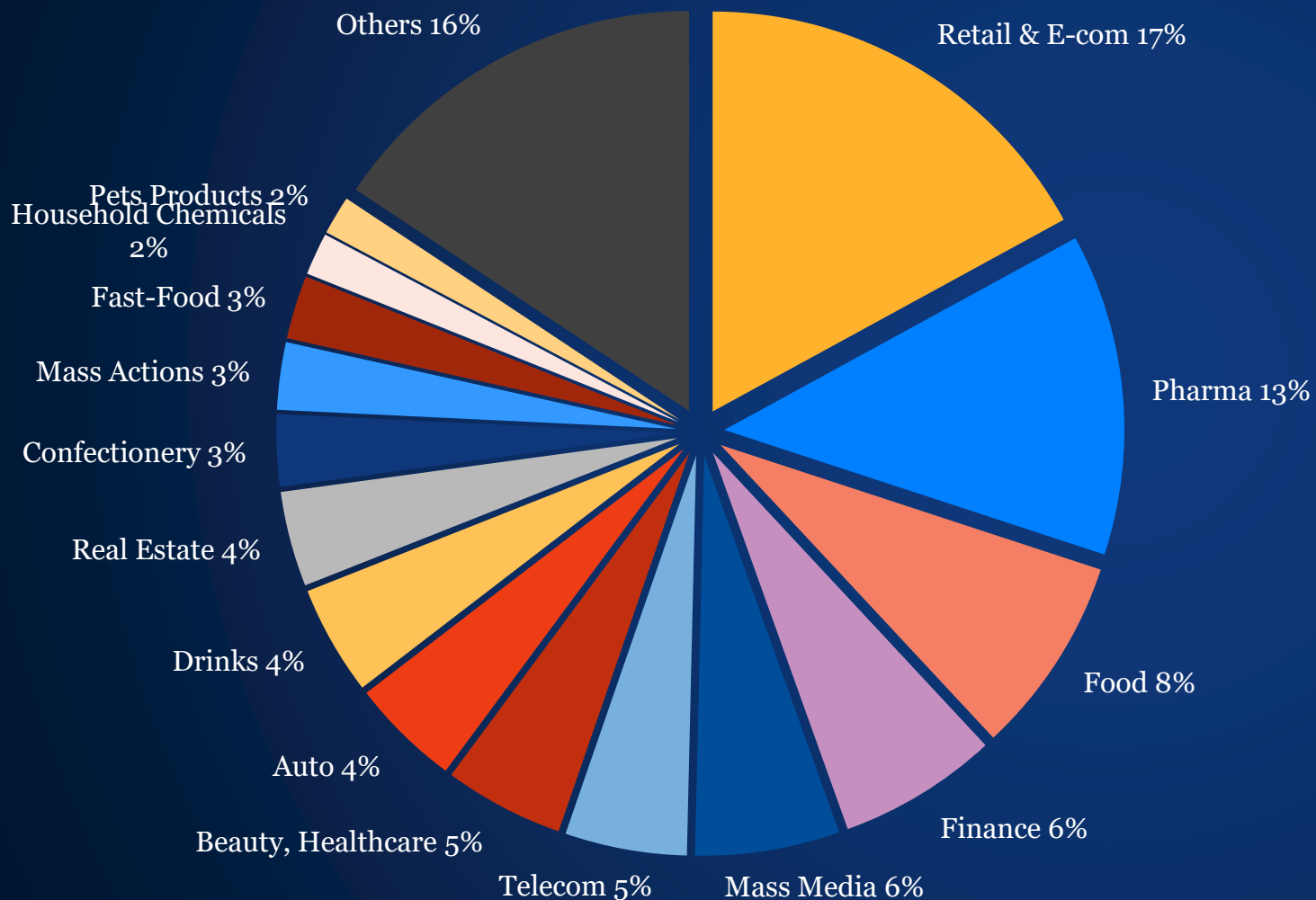


2021-2022 DYNAMICS BY MEDIA



MEDIA MARKET SPLIT BY CATEGORIES

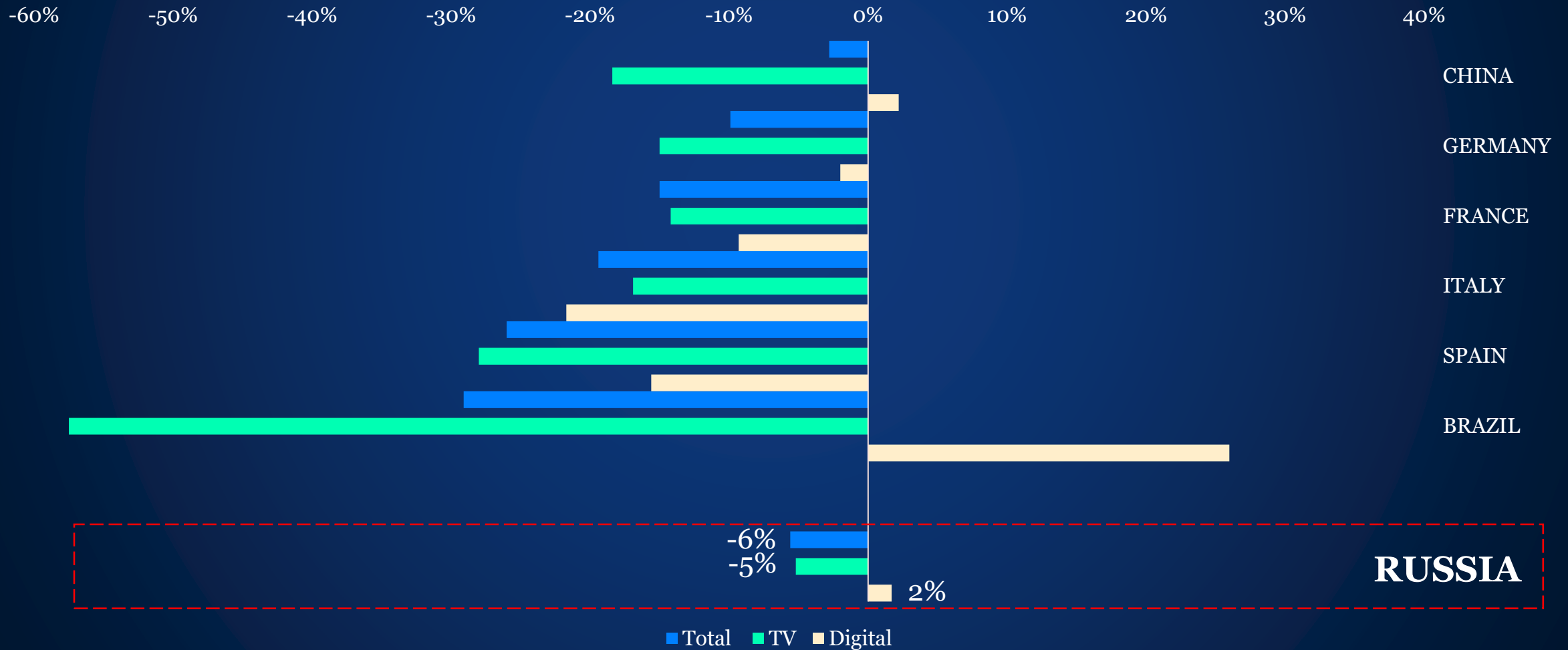
TYNY 2020



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

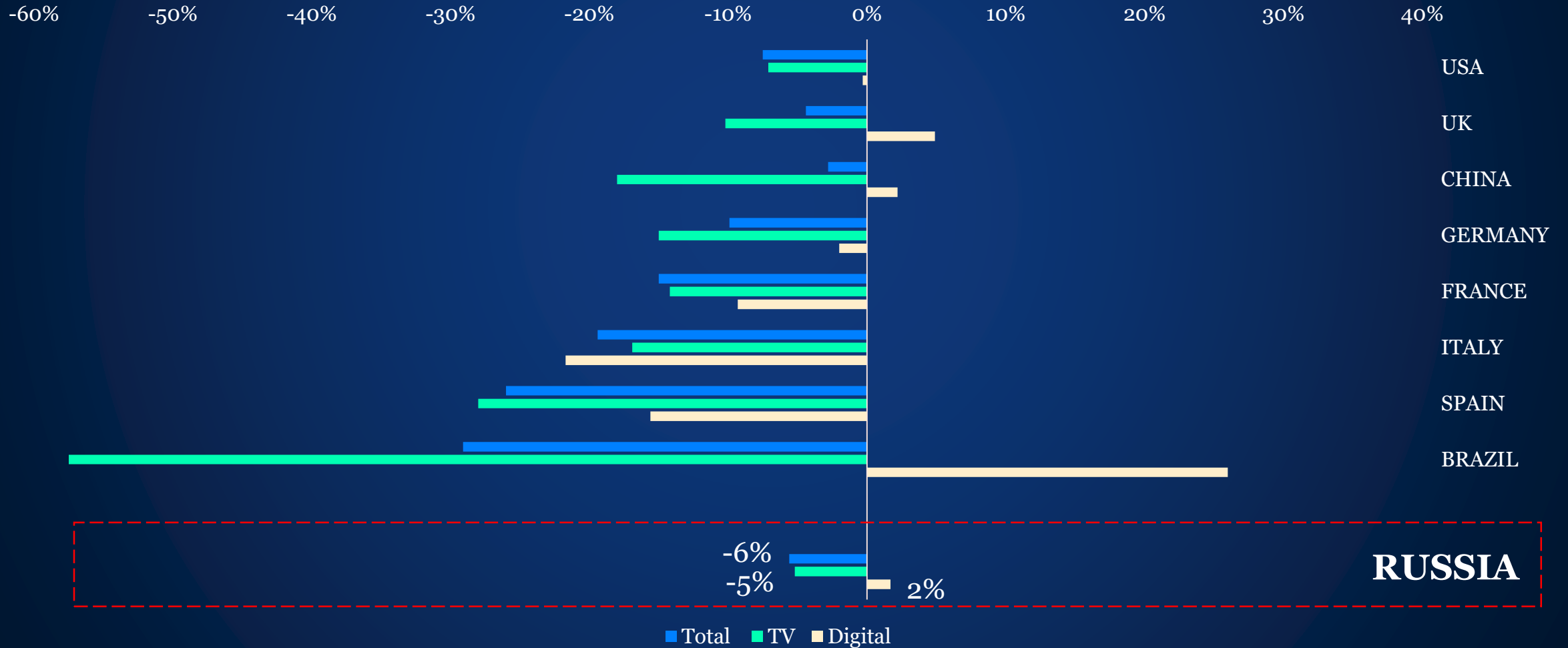
RUSSIA IS IN BETTER SHAPE

2020 MEDIA DYNAMICS



RUSSIA IS IN BETTER SHAPE

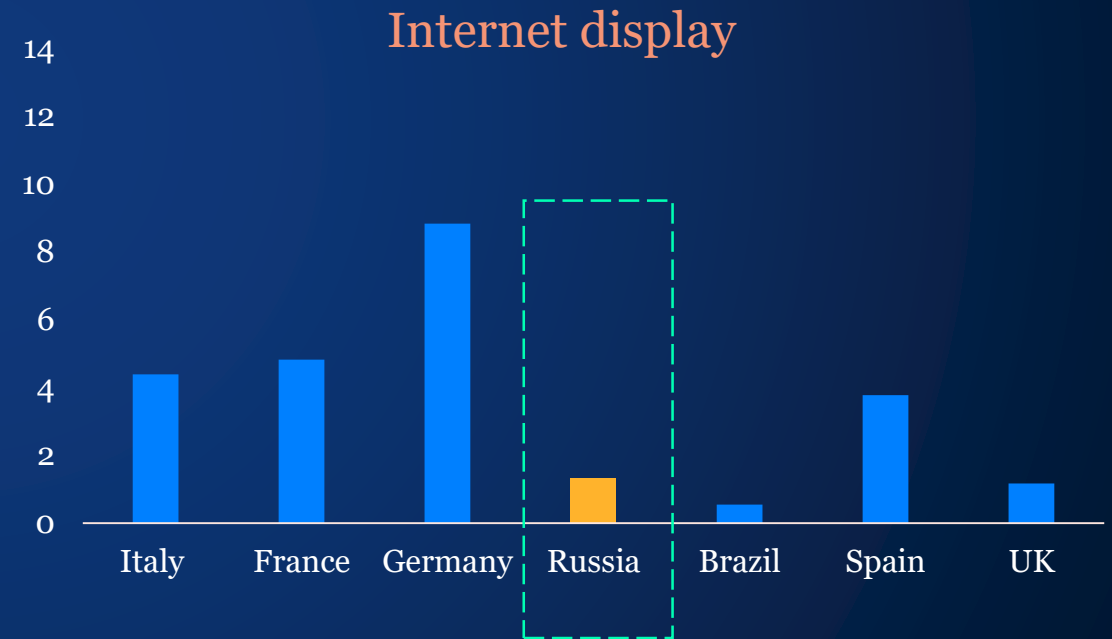
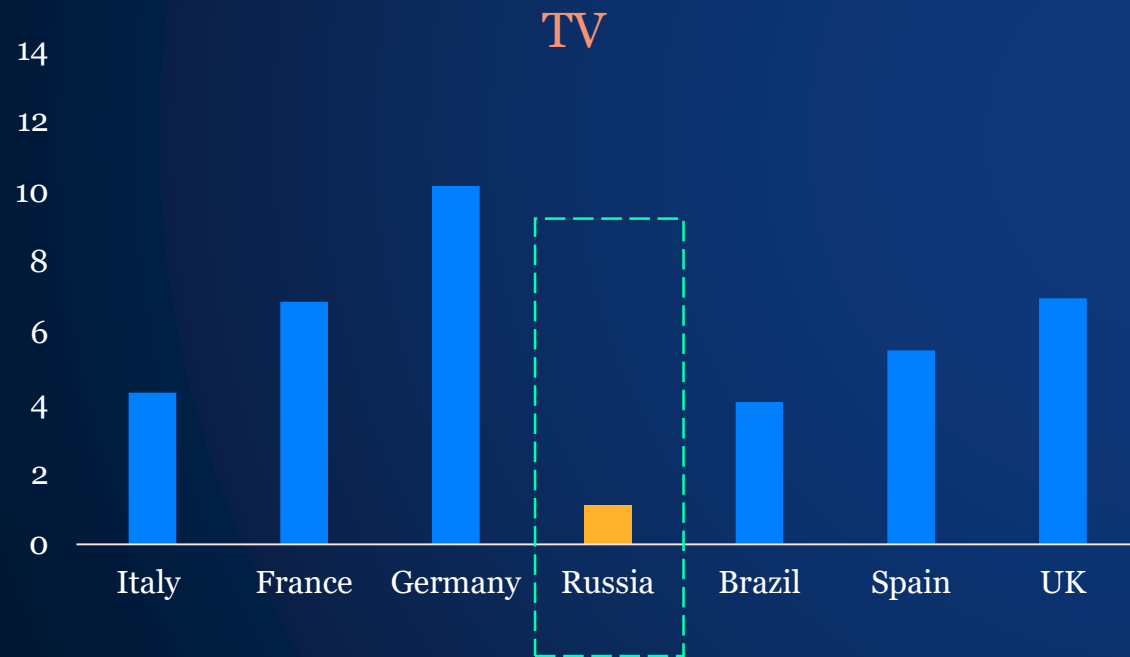
2020 MEDIA DYNAMICS



RUSSIA REMAINS A GOOD PLACE TO INVEST



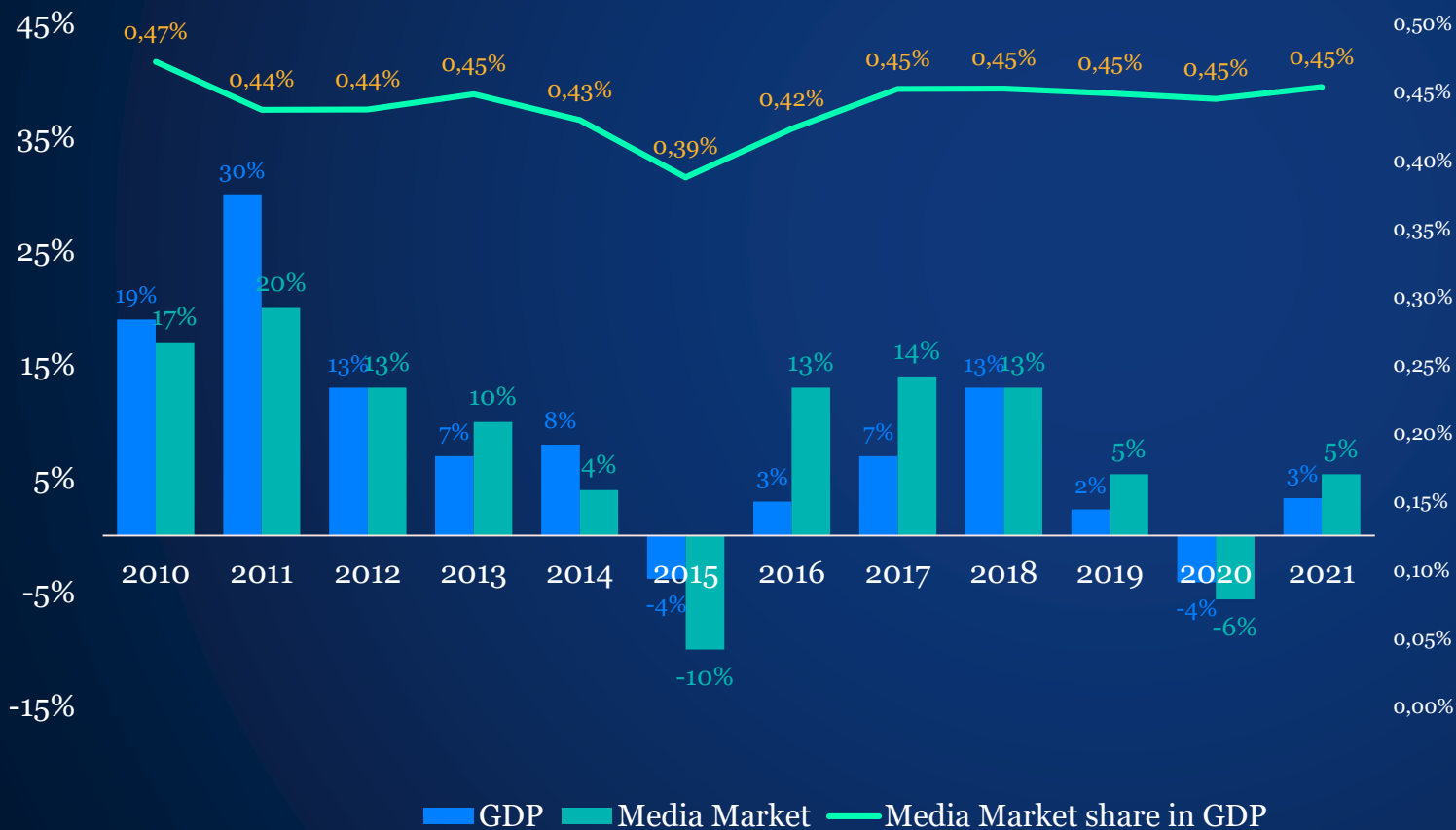
COST PER THOUSAND, ADULTS



NEXT YEAR



GROUPM EXPECTS ADVERTISING MARKET TO GROW 5% IN 2021



+3.3%

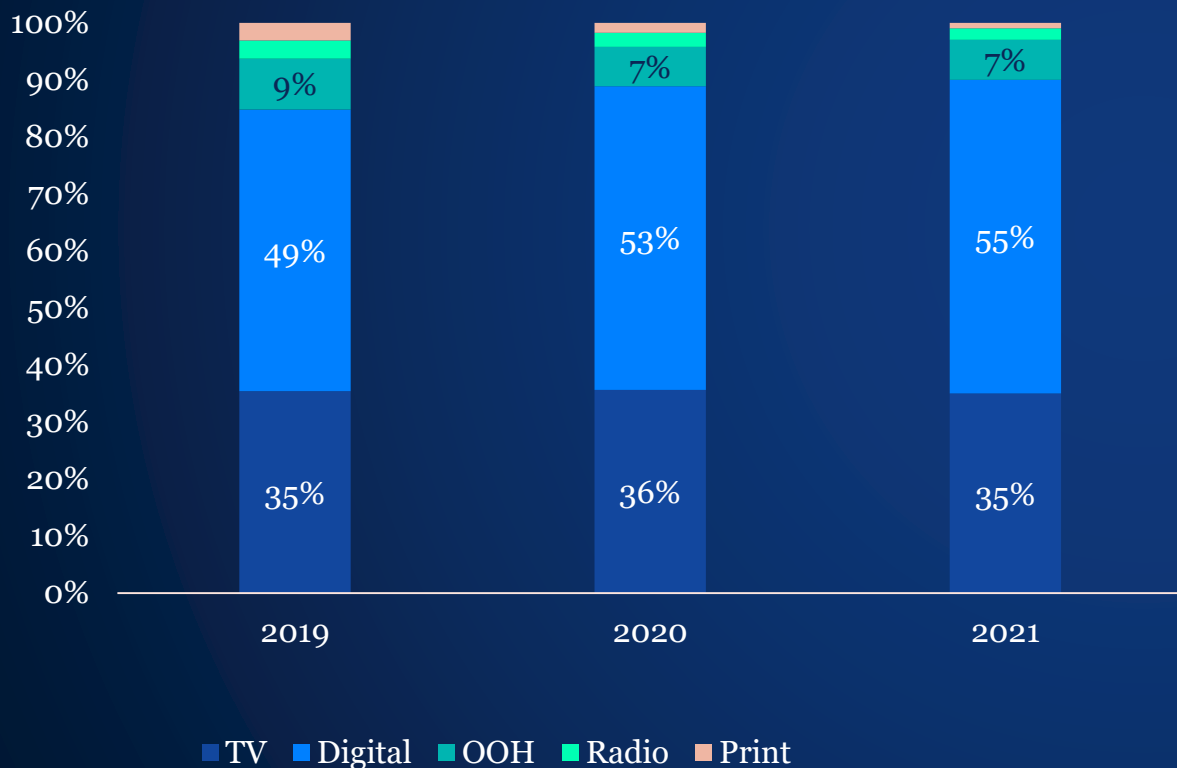
GDP 2021F

+5%

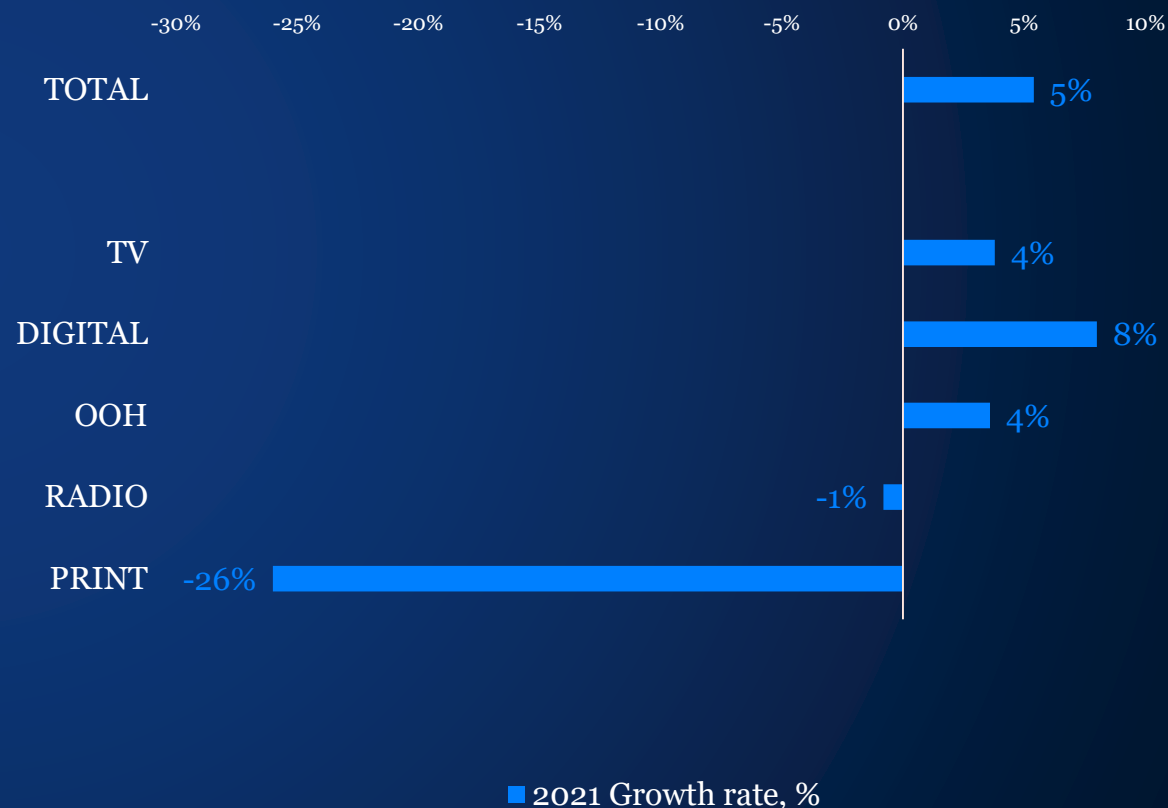
GroupM MM 2021F

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*m* 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
