

RUSSIAN MEDIA MARKET 2021 FORECAST

GroupM

JUNE, 2021



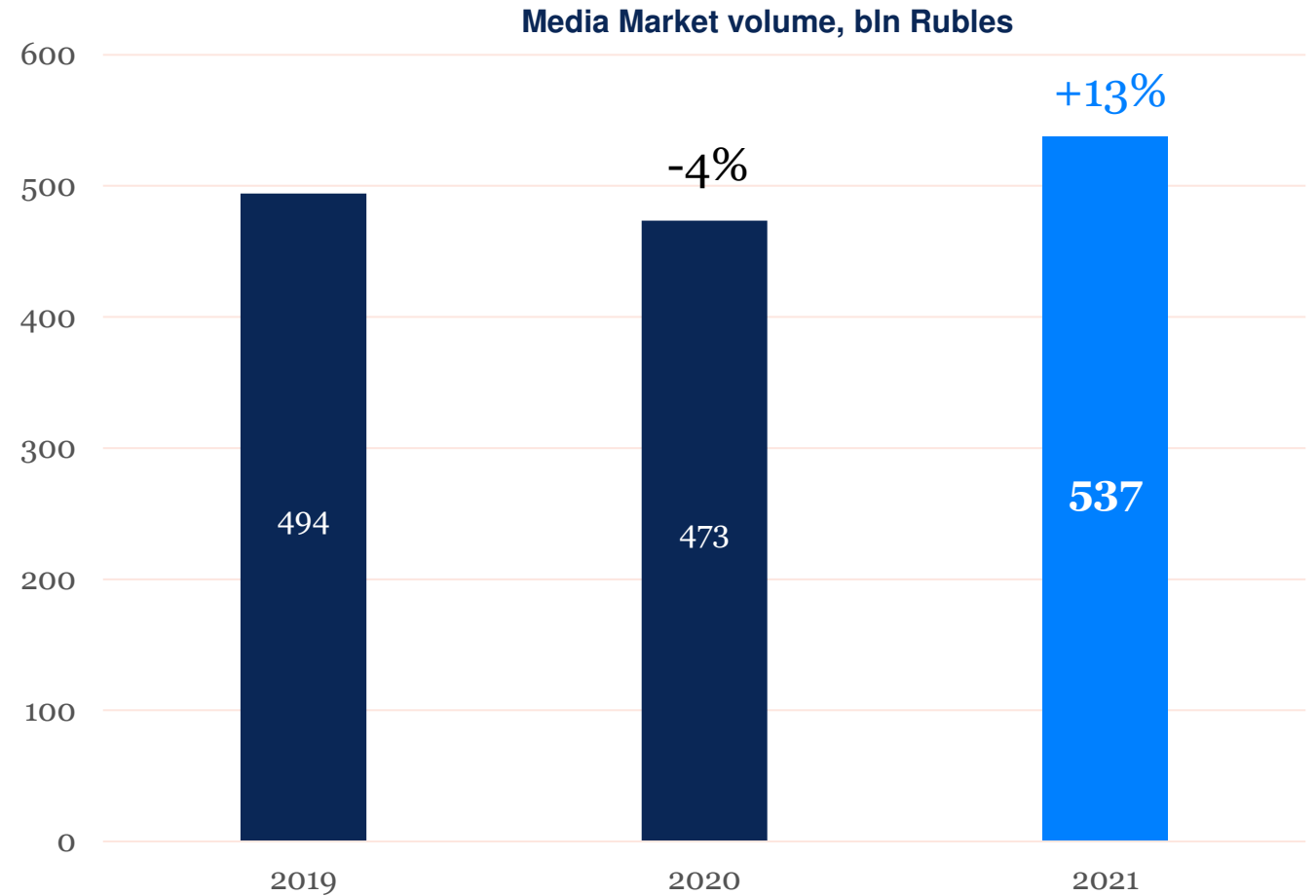
RUSSIAN MEDIA MARKET IS EXPECTED TO GROW BY 13% IN 2021

+6% vs. pre-pandemic 2019

In 2021 Russian Media Market can reach its historical maximum – 537 bln Rubles

The previous Media market volume record was in 2019 (494 bln Rubles)

■ Actual ■ Forecast

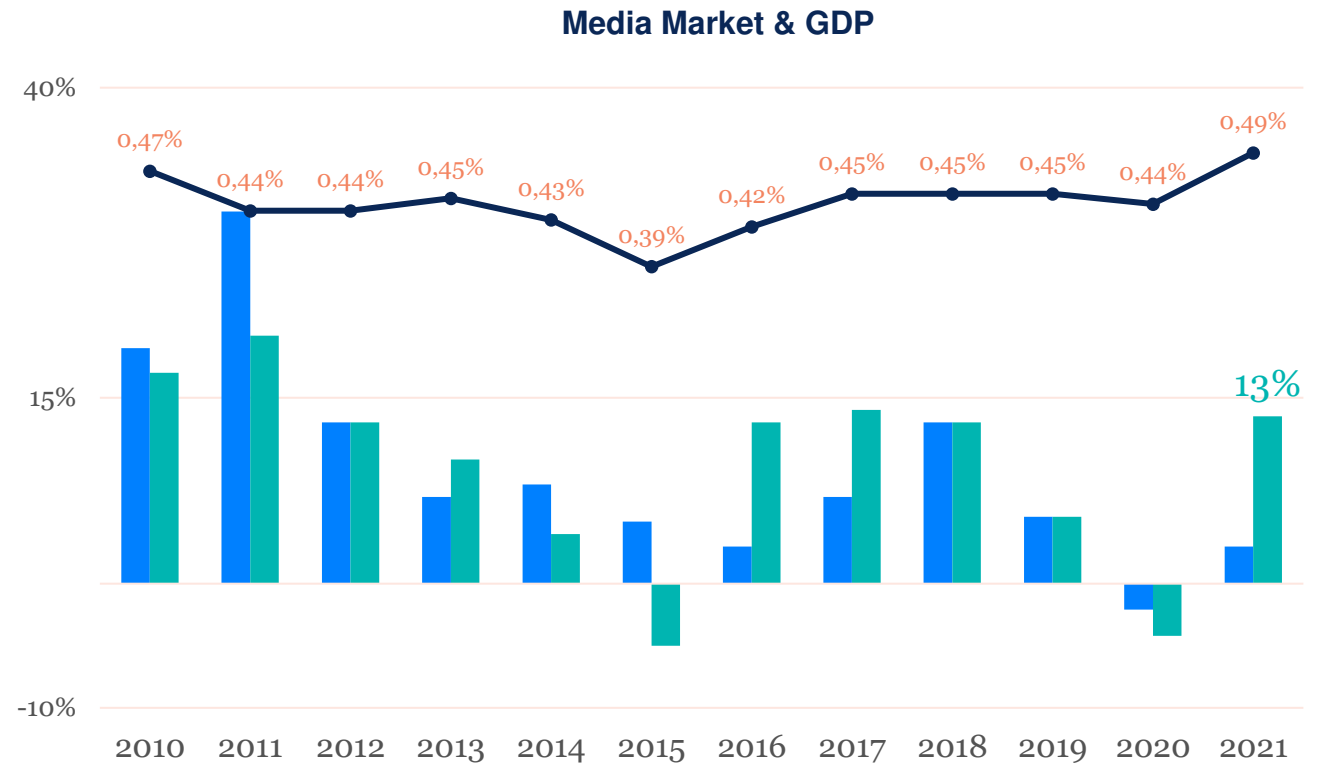


POSITIVE DYNAMIC OF GDP CREATES FOUNDATION FOR MARKET GROWTH

3% is the current GDP forecast

The Media Market's contribution to GDP is likely to increase from 0.45% to 0.49% due to the arrival of strong ad investors. Ecom, Internet-services, Retail and Finance sectors are the key market drivers. Ecosystem players: Yandex, Sber, Mail.ru Group became the largest advertisers.

- GDP
- Media Market
- Media Market share in GDP



SOURCE: <https://rosstat.gov.ru/accounts#>
https://www.akarussia.ru/files/docs/obem_dinamika_i_struktura_reklamnogo_rynka_rossii_v_2000-2020_gg_2.xlsx

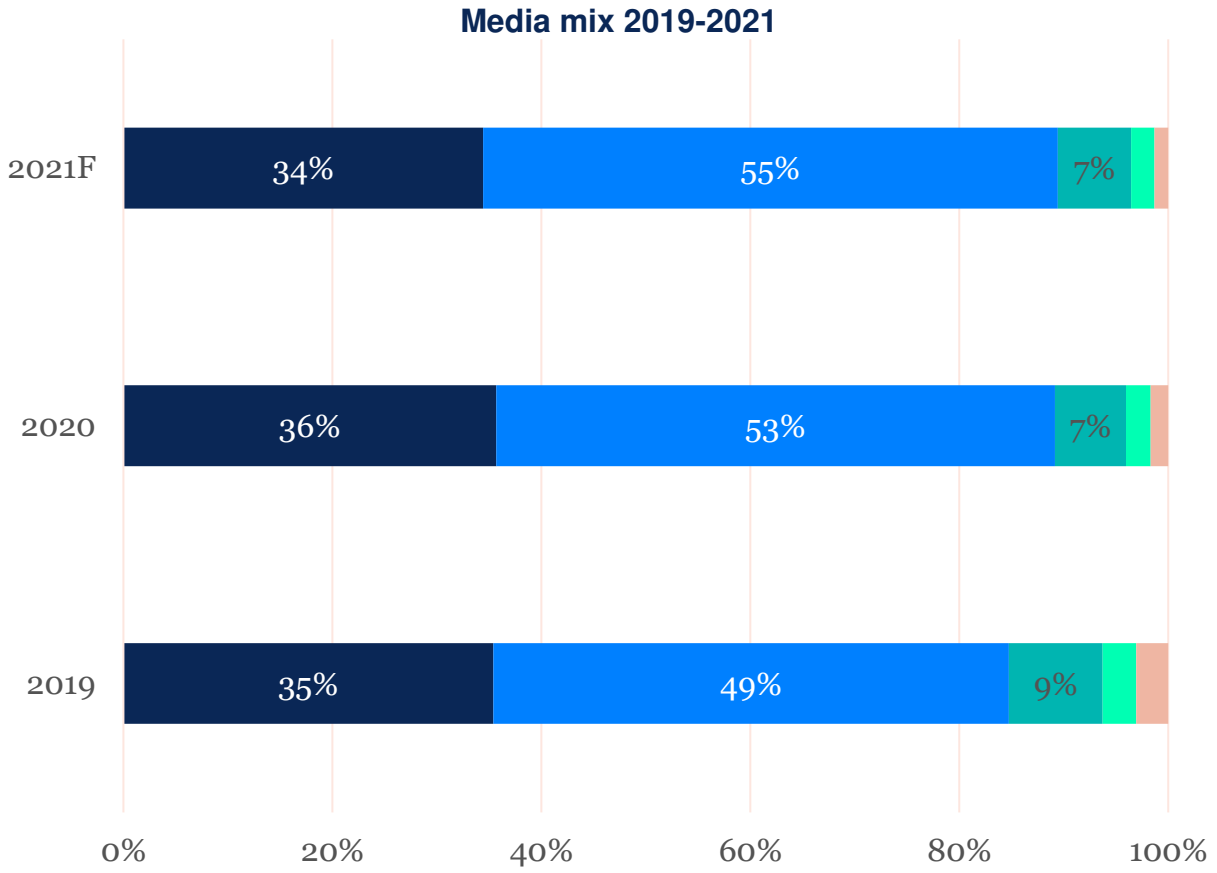
TELEVISION AND DIGITAL ACCOUNT FOR ALMOST 90% OF ALL ADVERTISING SPENDING

Combined Digital and TV share grew by 5% vs. 2019

Digital is the leader of ad investments.

TV & Digital were the least affected in 2020

■ TV ■ Digital ■ OOH ■ Radio ■ Print



SOURCE: 2019-2020 Russian Association of Communication Agencies, 2021 GroupM Russia forecast

ALL MEDIA WILL SHOW GROWTH, EXCEPT PRINT

Digital remains the main growth driver

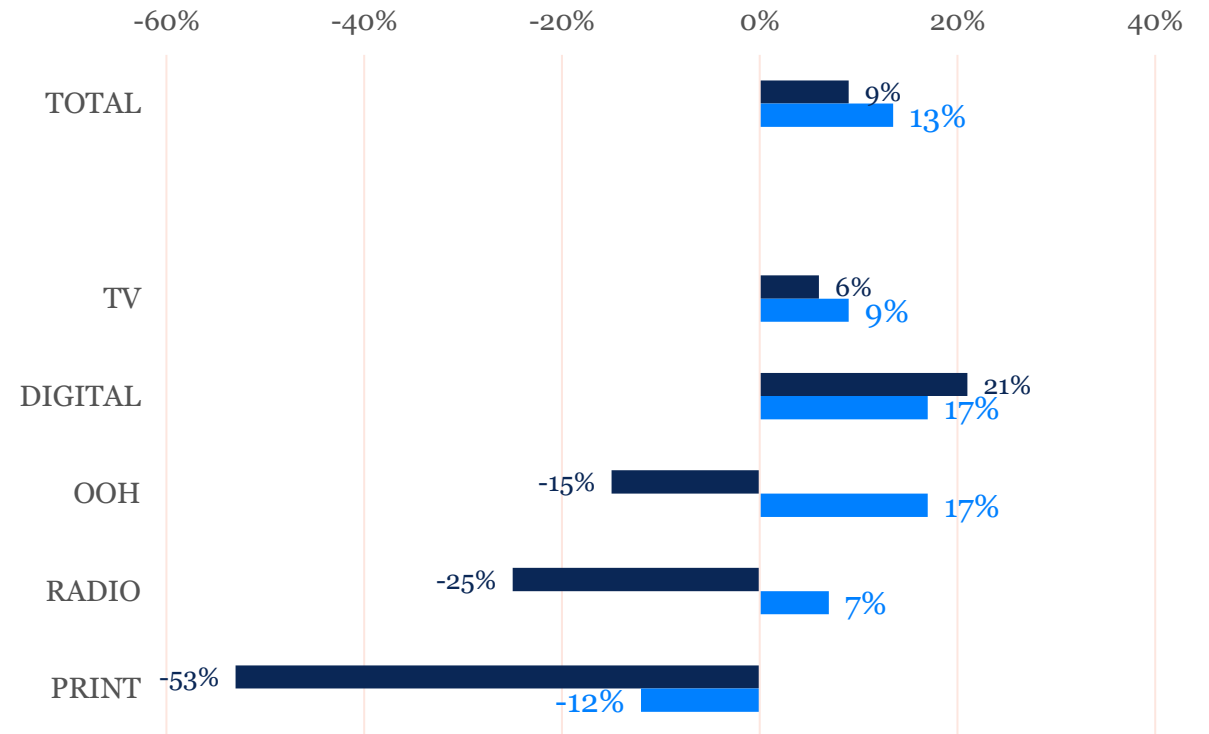
Digital spending expected to grow by 21% vs. 2019

TV can grow by 6% vs. 2019

Despite the increased investments in 2021, Radio and OOH will not restore their positions - negative dynamics will remain against 2019

■ 2021 / 2019 Growth rate, % ■ 2021 / 2020 Growth rate, %

Dynamics by media



THANK YOU
