



July 2021

MEDIA MARKET DIGEST

AGENDA

71% of Ukrainian employers are ready to try a 4-day work week

- Transformation of Ukrainian marketing teams during a pandemic
- Top-6 hypotheses about how the life and behavior of Ukrainians changed during the COVID-19

p.2-7

Media market and forecast

- Global investment in advertising will grow by 11% in 2021
- Marketing 2030: what should we expect?

p.8-11

How much data do Linear TV marketers need in a non-ad streaming world?

p.12-14

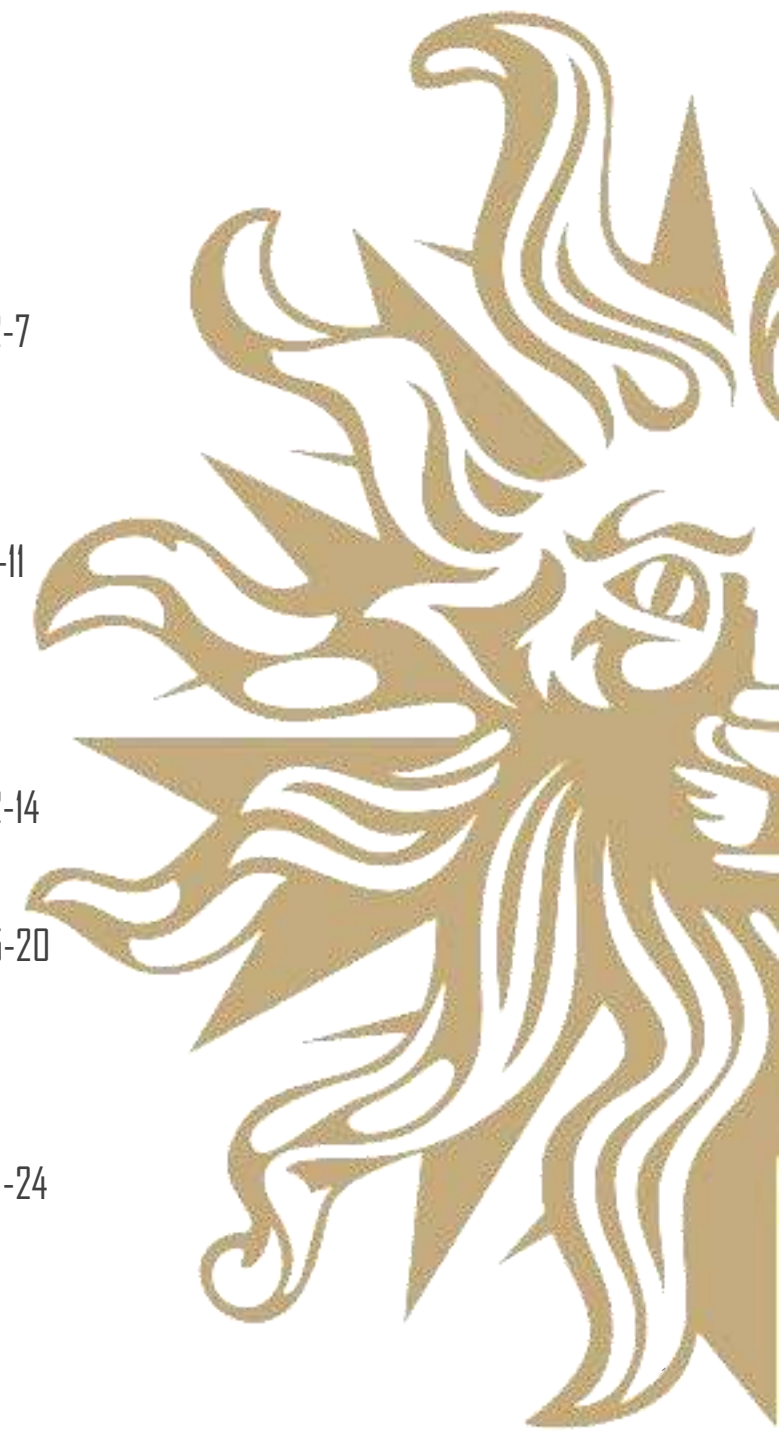
Google removes standalone Maximize conversions and Maximize conversion value strategies

- New reach and frequency metrics in Display & Video 360
- Tik Tok entered into partnership agreement with Publicis Groupe

p.15-20

IAB DOOH Committee published trendbook of 2 quarter 2021

p.21-24



CONSUMER TRENDS

Covid-19 situation
Consumer behavior
Economic situation



CONSUMER BEHAVIOR TRENDS

Brands acquire customer data using Covid-19 vaccine giveaways

America's rising vaccination numbers have helped Drop, a rewards app, add a new section to its playbook for acquiring customers. The giveaways increase brand-building and offer a nice booster shot's worth of new customer data, and a chance to build a direct commercial relationship with them. Drop is excited about their new data as well.

"We now have this valuable dataset that allows us and our partners to connect to that [vaccinated] group and possibly give them high-value offers," said Crowe. "Companies want to speak to people who have that mindset."



DIGIDAY SOURCE

Transformation of Ukrainian marketing teams during a pandemic



During the pandemic, the majority of marketing teams switched to a fully or partially remote work format. by **41%** of respondents noted that the productivity of work remained at the same level as in the offline. For almost half of the respondents, the staff of the teams remained the same, and for **34%** it has expanded.

MMR SOURCE

CONSUMER BEHAVIOR TRENDS



SOURCE

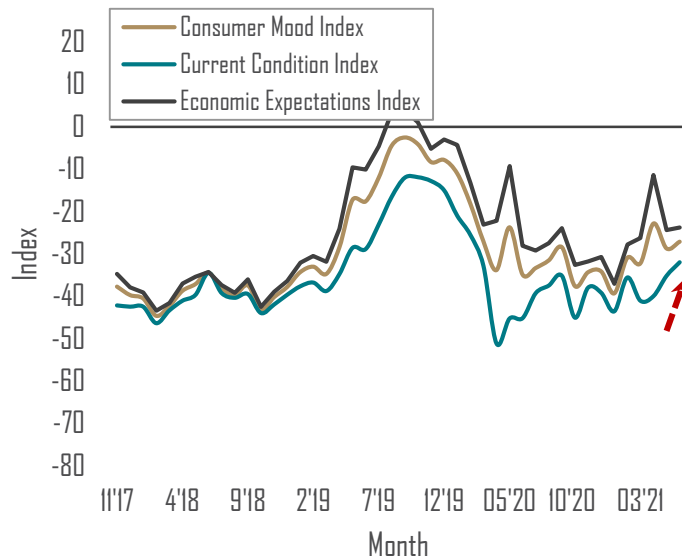
Sostav.ua

Top-6 hypotheses about how the life and behavior of Ukrainians changed during the COVID-19

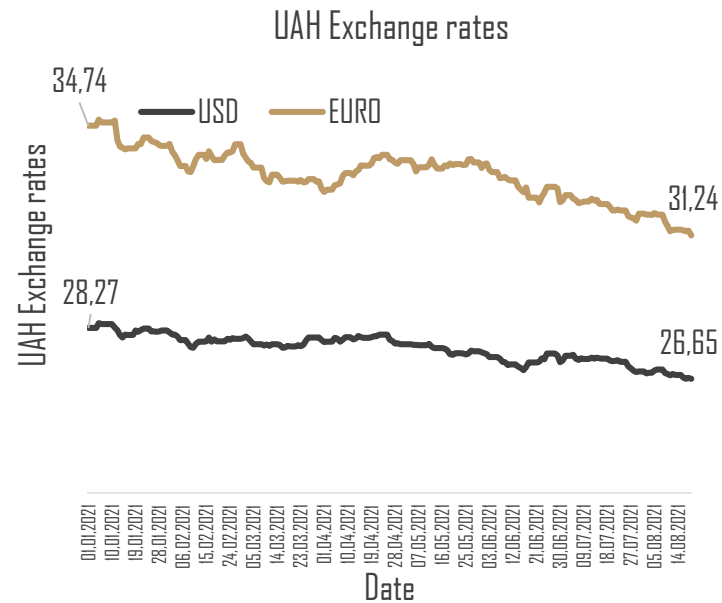
- **39%** of Ukrainians have begun to save money compared to pre-quarantine time;
- **30%** of people have started to watch movies and **21%** of respondents have started to watch TV;
- Only **19%** of Ukrainians before the pandemic avoided physical contact, during quarantine this figure reached **27%**;
- Only **17%** have begun to work from home according to the survey;
- Only **3%** of Ukrainians declare their intention to abandon online shopping after the pandemic, which is undoubtedly a good sign for the development and even greater growth of e-commerce;
- Regular surveys in various categories show a decrease in active loyalty to the brands of the categories.

FINANCIAL SITUATION

The slight growth of consumer mood index thanks to the improvement of expectations for economic development over the next year



Despite the actions of the NBU, the exchange rate continues to fall



Recovery in economic activity contributes to the normalization of indicators

NOW

5,4% GDP

In Q1'2021 vs Q1'2020 SSC

+6,5% Inflation
in Jan-July'21 SSC

5,8% real salary
In Jun'21 vs May'21 SSC

THEN

+3,7% GDP growth in 2021

(-4% in 2020)

+8% Inflation in 2021
(+5% in 2020)

+12% real salary in 2021
(+10,2% in 2020)

CONSUMER BEHAVIOR TRENDS



71% of Ukrainian employers are ready to try a 4-day work week

Employers noted that this will help reduce the company's office costs, for example, for electricity or paper (**53.3%**), optimize business processes with fewer working hours (**45.5%**), increase employee loyalty to the company (**51.6%**), will help to solve work tasks faster and increase self-discipline (**49.6%**). **87.8%** of surveyed employers noted that they are ready to leave the salary of their employees unchanged while the number of working hours decreases. And **12.2%** believe that it is logical to reduce the salary in this case.



SOURCE

Travel cuts prompt advertising rethink

Travel has always been considered the main advertising sector, but last year's cuts revealed a potential increase in efficiency. The ten largest brands have noticed an improvement in the ratio of advertising and sales, as in 2020 investment in advertising declined faster than sales revenue.



WARC

SOURCE

CONSUMER BEHAVIOR TRENDS

Adobe represented the most popular emoji of 2021

"I believe that we are more emotionally responsive to images, and therefore emoticons can help bring tone of voice, gestures and emotional reactions closer with images than with words alone," wrote Paul D. Hunt. The potential power of emojis is to better understand the feelings that underlie our digital text messages.



SOURCE



Pinterest embraces body acceptance with new ad policy

Beginning July 1st, 2021, they were updating ad policies to prohibit all ads with weight loss language and imagery. Idealizing or condemning certain types of figures and mentioning body mass index or similar indices are not allowed also. Ads promoting healthy lifestyles and habits, or fitness services and products will continue to be allowed on Pinterest unless they are targeted at weight loss.



SOURCE

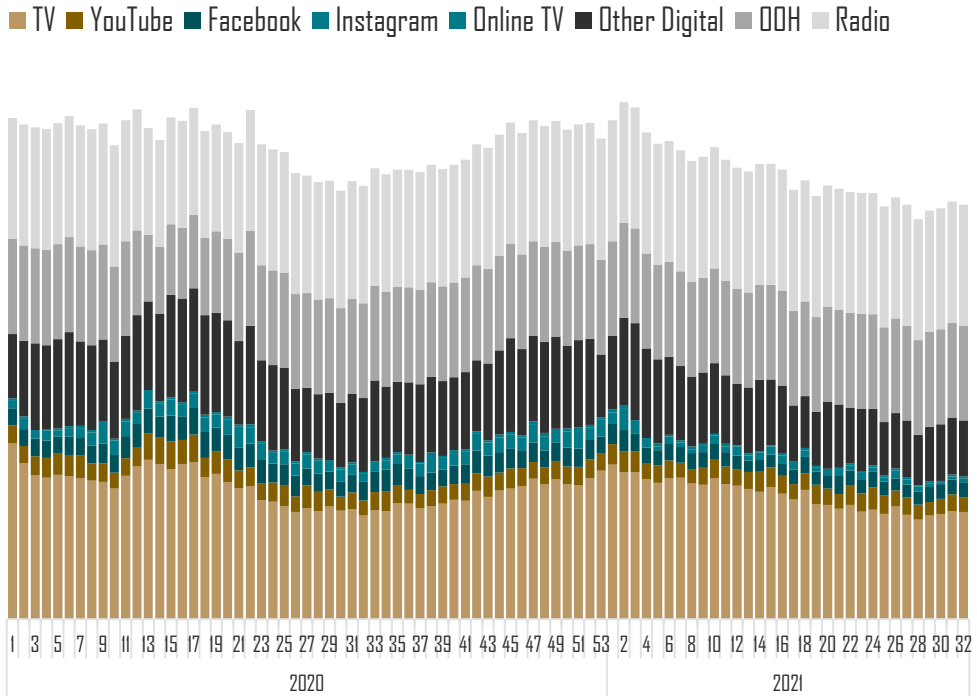
MEDIA FOCUS

Ukrainian Media Market

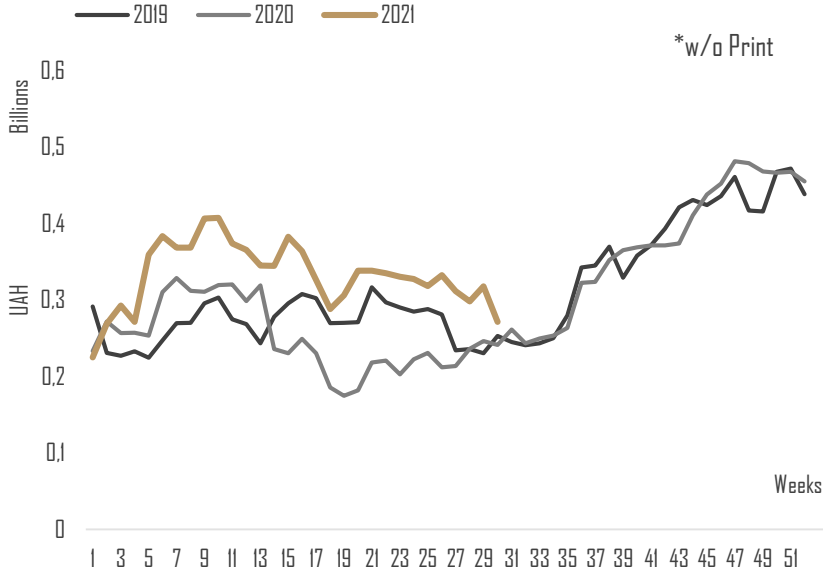


MEDIA INVESTMENTS IN 2021 IS ALREADY HIGHER VS 2020

Video consumption has fall



The investment dynamics is the same as in 2020



Source: MMW, Nielsen Ukraine (2014+); TA 18-54 50k+, Communication Alliance, agency estimation

MEDIA MARKET TRENDS



Global investment in advertising will grow by 11% in 2021

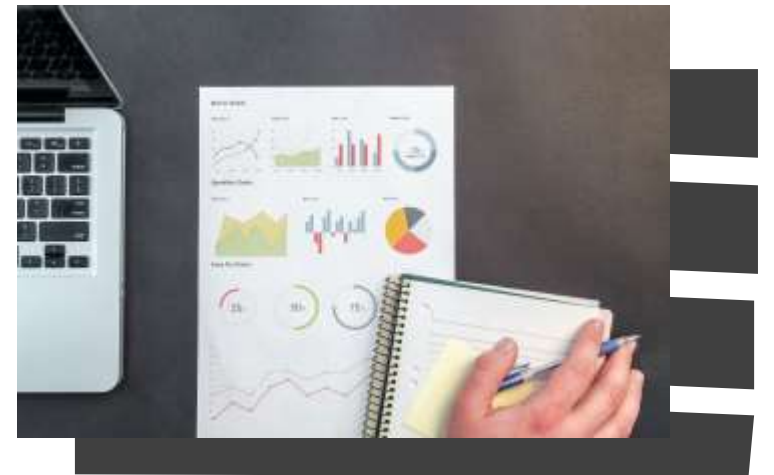
In 2021, global investment in advertising will grow by **11.2%**. According to **Zenith's** Advertising Expenditure Forecasts report, this growth is driven by high demand for e-commerce and online video. This year, investment in advertising will amount to **669 billion** US dollars, which is **40 billion more** than in 2019 before the pandemic.

Sostav.ua

SOURCE

Volume share of marketing services 2021

Event marketing and sponsorship will increase by **25%**, Trade and consuming will increase by **10%** and **15%** accordingly.



Sostav.ua

SOURCE

MEDIA MARKET TRENDS



Top brands are sending \$2.6 billion to misinformation websites each year

New analysis from NewsGuard and Comscore has found that the misinformation industry is booming – with **\$2.6 billion** in estimated advertising revenue being sent to publishers of misinformation and disinformation each year by programmatic advertisers, including hundreds of millions in revenue supporting false health claims, anti-vaccine myths, election misinformation, partisan propaganda, and other forms of false news.

 **NewsGuard** SOURCE

Marketing 2030: what should we expect?

New trends: holographic solutions, VR and AR, marketers-robots and environmental considerations of consumers (green marketing).



 SOURCE

TV

Monthly Trends

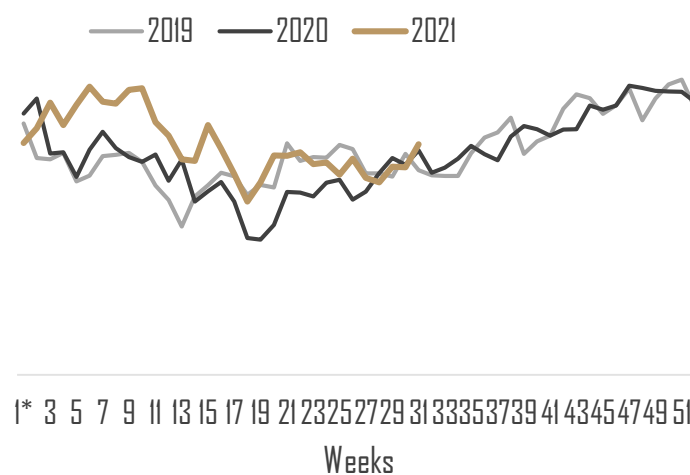
+12% 2021 vs 2020

-1% Jul 2021 to Jun 2021

98% SOR in Jul 2021

Dynamic is higher vs previous years

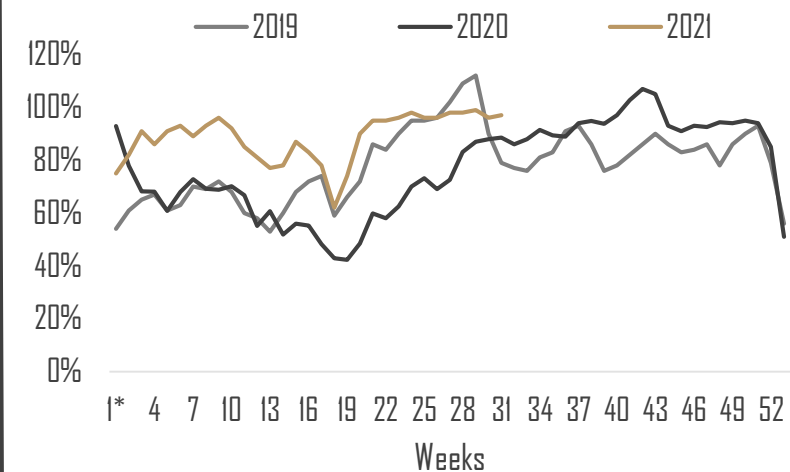
TV DA, '000 EqGRP



Sold-Out is 97% on 31w

Premium TV shows Sold-Out **98%** while TvoE TV on **95%** level

TV SOR, %



Source: MMW, Nielsen Ukraine (2014+); direct advertising, '000 EqGRP, TA 18-54 50k+

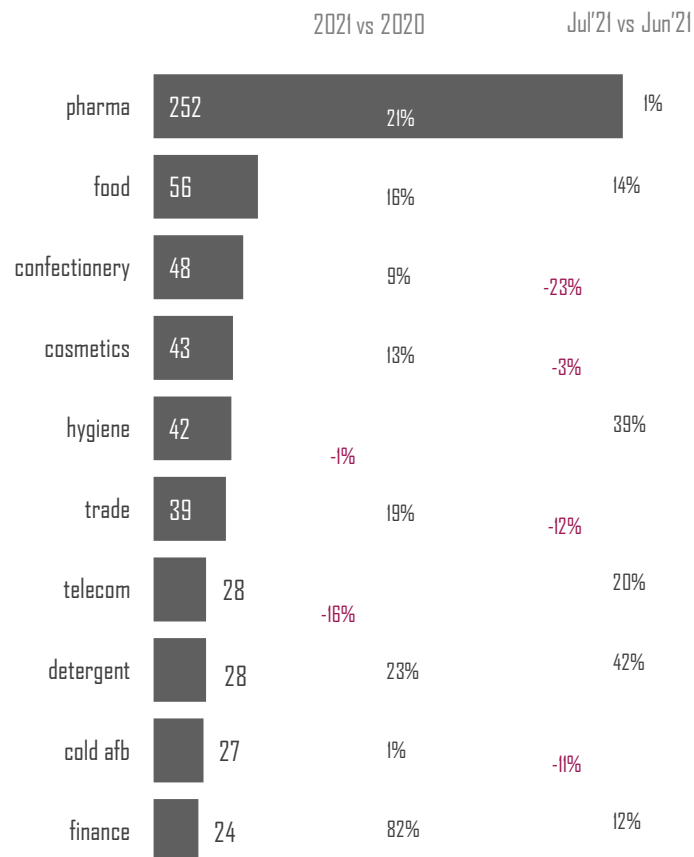
TV

Monthly Dynamic

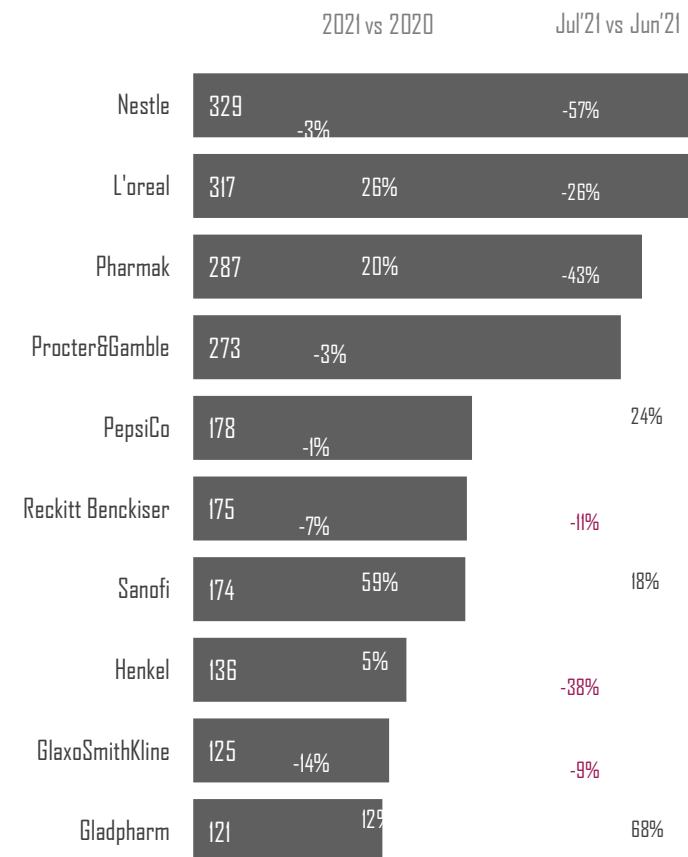
L'oreal grew thanks to the group of cosmetics and perfumes

Finance category grew mostly thanks to Moneyveo, PariMatch and Aventus Ukraine

TOP Categories



TOP Advertisers

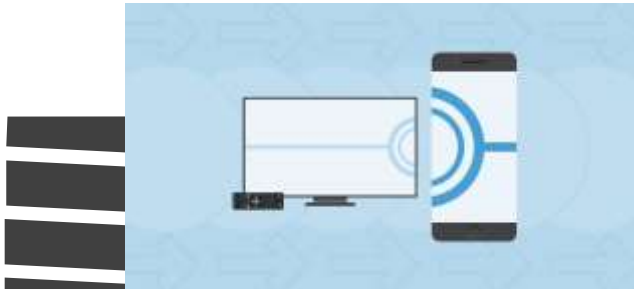


Source: GFK/Nielsen, Direct Advertising, excl. Social & Media, TA: 18-54 50k+, '000EqTRPs. Data owner is ITC.
Processed by "CCM" Subsidiary Enterprise

TV KEY NEWS

What we know about combining TV with digital media

TV and digital strategies are vital for brands to reach consumers throughout the day. Multi-screen campaigns can be complementary and help to drive deeper engagement. By combining TV and digital advertising, brands can benefit from the mass awareness of traditional media, as well as the targeted, personal nature of many digital channels. Planning TV and digital should take account of specific campaign goals and differing levels of attention.



SOURCE

How Much Data Do Linear TV Marketers Need In A Non-Ad Streaming World?

Nielsen says 25% of total TV consumption comes from streaming. But only 6% is with ad-supported streaming services. Nielsen, offer what seems to be reasonable viewing data -- total viewing minutes of specific shows on a weekly basis. But in the digital world where servers have actual viewing data, it's not enough. And there are other more pressing issues: A continuation of the supply-and-demand problem started years ago with linear TV for top prime-time ad inventory.



MediaPost

SOURCE

More than 372 million people watched the European Olympics on Discovery

Discovery continues to expand access to content through free and paid broadcasts, thanks to an online digital format during the Olympic Games. Spectators had the opportunity to get closer to every moment of the Olympic Games. Tokyo 2020 contributed to a record growth of the audience - almost 3 times more people made a paid subscription for the 2018 Winter Olympics.



Sostav.ua

SOURCE

DIGITAL

Monthly Dynamic

Display adv decreased by 3%
Video adv decreased by 32%
in 2021 vs 2020



TOP VIDEO Categories 2021 vs 2020

Category	2021	2020	% Change
entertainment	819	738	11%
finance	738	715	2%
trade	598	935	-38%
pharma	218	325	-66%
it	175	215	-48%
restaurants	168	185	-22%
confectionery	166	185	-18%
education	165	450	36%
cosmetics	141	155	-55%
food	137	165	-48%

Advertisers 2021 vs 2020

Advertiser	2021	2020	% Change
UNL	630	475	26%
Rozetka.ua	307	365	-17%
Melbet	197	255	77%
PariMatch	182	135	13%
SPACEIKS	135	135	100%
Na Urok	121	70	169%
Vulcan	114	70	15068%
L'oreal	101	105	-52%
Favbet	95	135	-44%
Youtube.com	90	135	-45%



TOP DISPLAY Categories 2021 vs 2020

Category	2021	2020	% Change
trade	3 814	4 750	-22%
finance	2 687	2 250	47%
auto	1 251	1 450	17%
it	684	1 100	57%
education	448	1 400	31%
entertainment	415	630	-37%
realty	384	500	-25%
pharma	326	500	-35%
tobacco	325	2 000	16%
telecom	308	400	-27%

Advertisers 2021 vs 2020

Advertiser	2021	2020	% Change
Rozetka.ua	1 333	1 130	18%
Pari-Match	536	780	68%
Ixbet	488	1 850	264%
Nestle	356	415	-15%
Favbet	321	335	-4%
Answear.ua	266	340	-23%
Philip Morris	259	435	58%
Foxtrout	246	250	-59%
Fan Sport	191	290	64%
Asustek	171	65	2592%

Source: Kantar, mln Impressions

DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Performance goal	Old Bid Strategy	Updated Bid Strategy
Maximize conversions within a set budget	Maximize conversions	Maximize conversions (no target CPA specified)
Maximize conversions to a target CPA	Target CPA	Maximize conversions using a target CPA
Maximize conversion value within a set budget	Maximize conversion value	Maximize conversion value (no target ROAS specified)
Maximize conversion value to a target ROAS	Target ROAS	Maximize conversion value using a target ROAS

Google removes standalone Maximize conversions and Maximize conversion value strategies

The tCPA and tROAS options will be bundled in the next few weeks, but existing campaigns will continue to function as usual.

Search Engine Land | SOURCE

NEW Optimized Targeting in Google Ads: What You Need to Know

This is a branched-off targeting option automatically applied to advertisers leveraging audience or demographic targeting on Display, Discovery, and some video campaigns.



DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Case Study. Driving results: Stellantis runs to new horizons with Custom Bidding

Stellantis used Custom Bidding in DV360 to optimize strategies in a fully-automated and data-driven way.



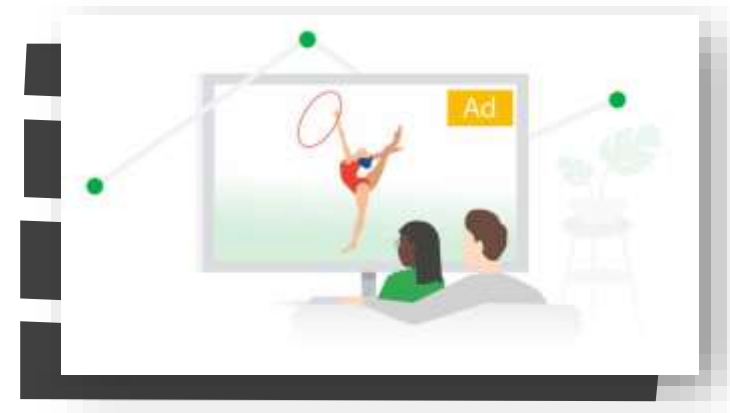
New reach and frequency metrics in Display & Video 360

New metric will help you get a better understanding of how Programmatic Guaranteed deals contribute to the incremental reach you get from applying frequency management across media.



Reach TV and audio streamers with Display & Video 360

Three additional features that will help you easily capture the attention of CTV and audio streamers and understand what encourages them to become customers.



DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Campaign Idea Generator added to Facebook

The new tool includes: Ready Ads Feature, Organic Post Tool, DIY Solution. The tool will suggest ideas and resources tailored to the specific topic.



It is now possible to place Lead Ads in Facebook video feeds

Facebook added the ability to post video Lead Ads in feeds and the Single Image format.



Facebook to Restrict Ads Targeting Teens

"Facebook says it will no longer allow advertisers to target those 18 and under based on their interests and activity on other sites. The new policy, which also applies to Instagram and Facebook Messenger, still allows targeting of teens, but only based on age, gender and location."



DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

5 Digital marketing trends and innovations for 2021

- Automation is the new norm: ai-driven chatbots – method that can help avoid overworking;
- Getting personal when you mean business;
- Refined SEO strategies;
- Customer voices matter – literally: customers can use their voice assistants to make purchases, and it's up to brands to make this process simple and streamlined;
- Social shopping: simplifying the buying experience and keeping the checkout as quick as possible are still a top priority.



Maddyness [SOURCE](#)

Tik Tok entered into partnership agreement with Publicis Groupe

The two companies will join forces to offer brands access to exclusive research and first-ever Community Commerce Sprints. Publicis clients will be chosen to participate in TikTok's first-ever "Community Commerce Sprint", a bespoke incubator program that will prepare brands to create impactful commerce campaigns for TikTok ahead of the holidays. The TikTok community is reshaping the way we discover new products and shop. Just one example of Community Commerce in action is the #TikTokMadeMeBuyIt hashtag, which showcases the products the community discovered on TikTok and has generated over **3.8B** views to-date.



TikTok [SOURCE](#)

DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Influencer Marketing Spend to Reach \$ 3.69 Billion in 2021



U.S. influencer marketing spending will rise by **33.6%** in 2021 to **\$3.69 billion**, strongest spending growth in the industry since 2019. Instagram is the leading influencer marketing platform, reported eMarketer, which estimated that Instagram accounts for roughly half of the market. A significant portion of spending also goes to influencer campaigns on YouTube and Facebook. TikTok is still a small – but growing – slice of the influencer marketing spending pie.



SOURCE

What's next for digital marketing in 2021

Video isn't an option anymore, Multi-channel marketing is a must, Conversational marketing, Nostalgia marketing, A greater focus on customer privacy and security, Trustworthy media monitoring.



OOH

OOH market increased in monitored inventory by 76% vs same period 2020

TOP Categories

2021 vs 2020

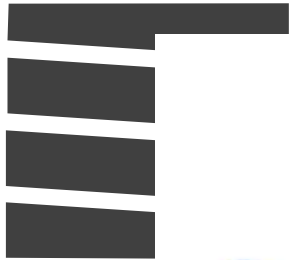
trade	564	61%
realty	326	65%
auto	175	66%
entertainment	159	32%
medicine	118	127%
sport	87	25%
restaurants	72	59%
telecom	70	81%
finance	61	12%
it	61	106%

TOP Advertisers

2021 vs 2020

Sport Life	64	19%
Fozzy Group	57	105%
Epicenter	52	110%
Integral Bud	46	215%
Metro	31	36%
Lifecell	27	92%
Radioplayer	22	306%
Riel	20	-34%
Expo Ukr	20	300%
McDonald's	19	19%

Source: Communication Alliance-OOH, Budget, Mln UAH. Data is processed by "CCM" Subsidiary Enterprise



IAB DDOH Committee published trendbook of 2 quarter 2021

DDOH inventory dynamic in Ukraine outpaced the global ones. Also, social useful content attracts extra attention to the inventory

SOURCE



OOH CASES

TikTok uses Outdoor advertising to draw attention to independent artists

Through OOH advertising on the streets of British cities, TikTok introduces the general public to artists who do not have a contract with record labels. Passers-by in Glasgow, Liverpool and Bristol can scan QR codes on commercials to switch to a selection of independent musicians on TikTok.



SOURCE

The first multi-trigger DDOH campaign for Vichy was conducted in Ukraine in June, 2021

Zenith Ukraine and PRIME Group conducted a contextually determined DDOH-campaign in Kyiv. Its feature was a dynamic change of content: the display of a particular advertising plot depended on a combination of three variables: time of day, air temperature and atmospheric phenomena.



SOURCE

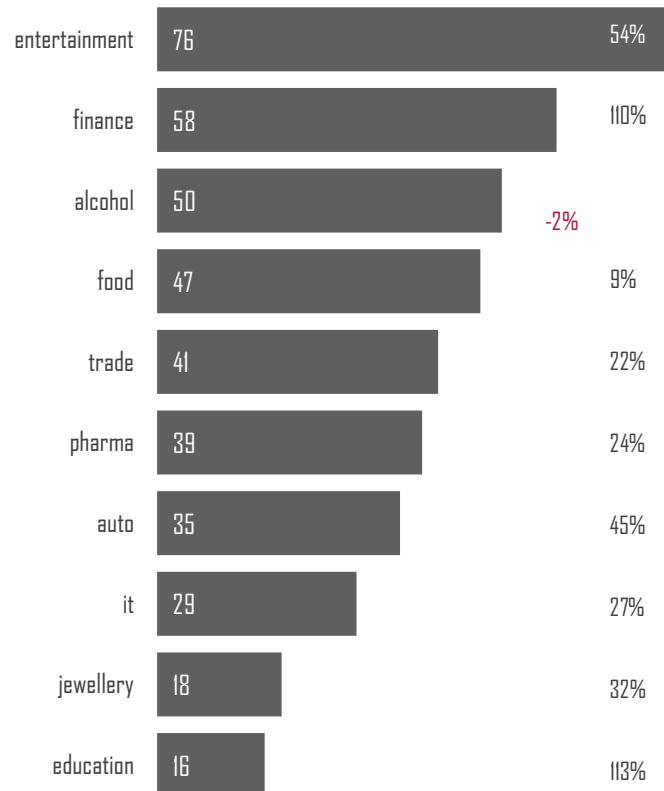
RADIO

Radio market increased by
44% vs Jul'20

Education increased more
than twice vs 2020

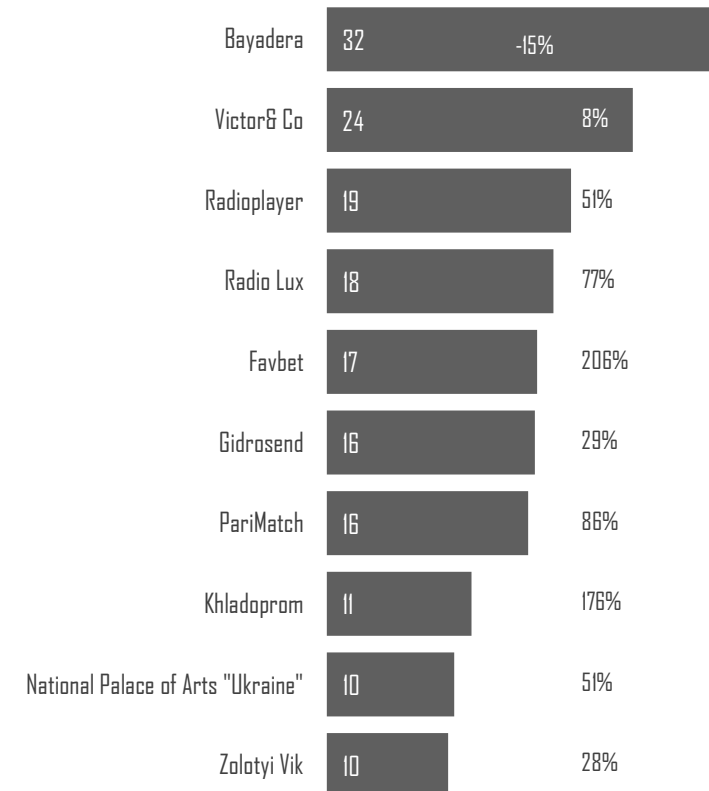
TOP Categories

2021 vs 2020



TOP Advertisers

2021 vs 2020



Source: Communication Alliance-OOH, Budget, Mln UAH. Data is processed by "CCM" Subsidiary Enterprise

THANK YOU!


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The ROI agency



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