PUBLICIS
GROUPE

September 2021

MEDIA MARKET DIGEST

AGENDA

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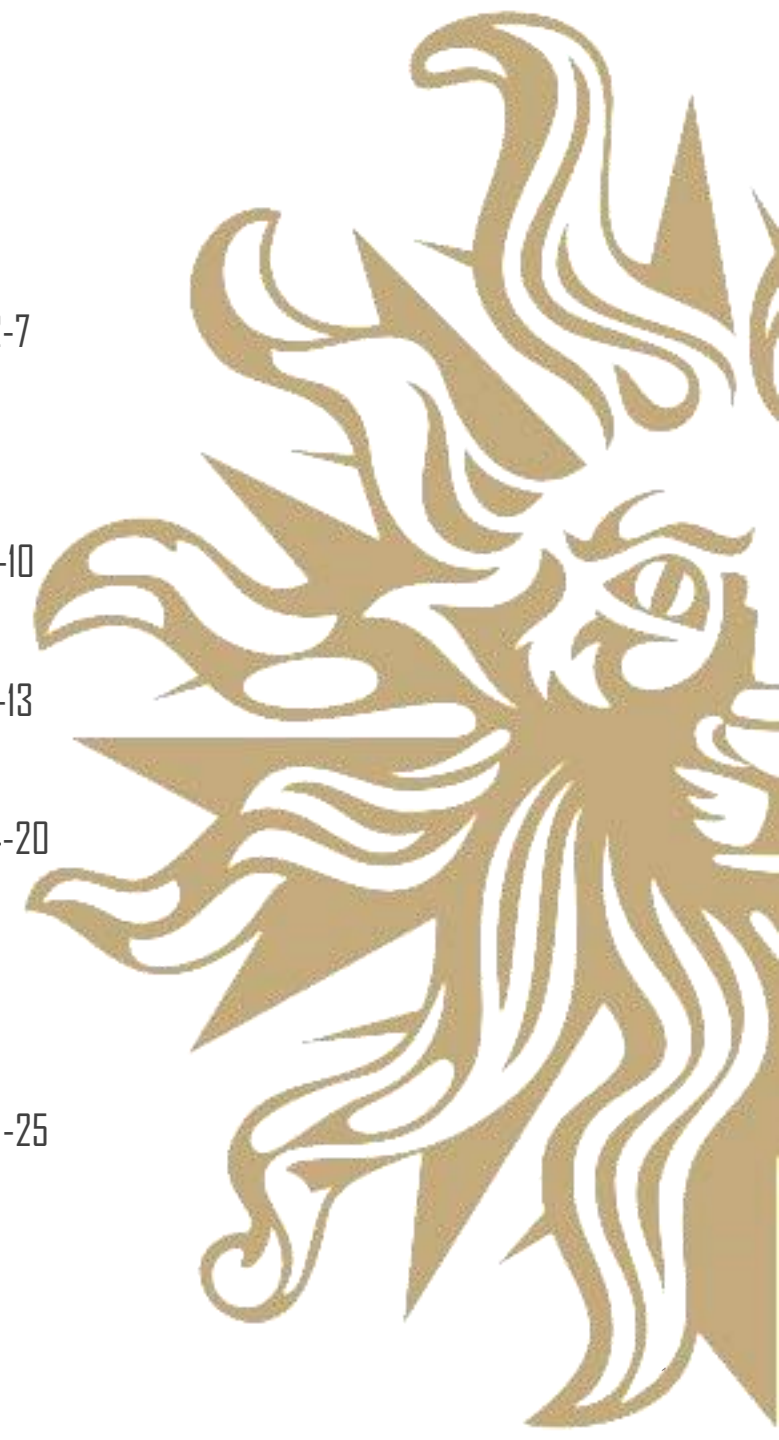
CONSUMER TRENDS

Covid-19 situation
Consumer behavior
Economic situation

LOOKS LIKE WE ARE CLOSE TO THE NEW COVID-19 PEAK

Interregional transportation is carried out only in the presence of a vaccination passport or a negative test for coronavirus, made not earlier than 72 hours before boarding

All countries show Covid-19 numbers greater than before

Legend: China, France, Germany, Italy, Poland, Russia, Spain, Ukraine

Day from sick number growth
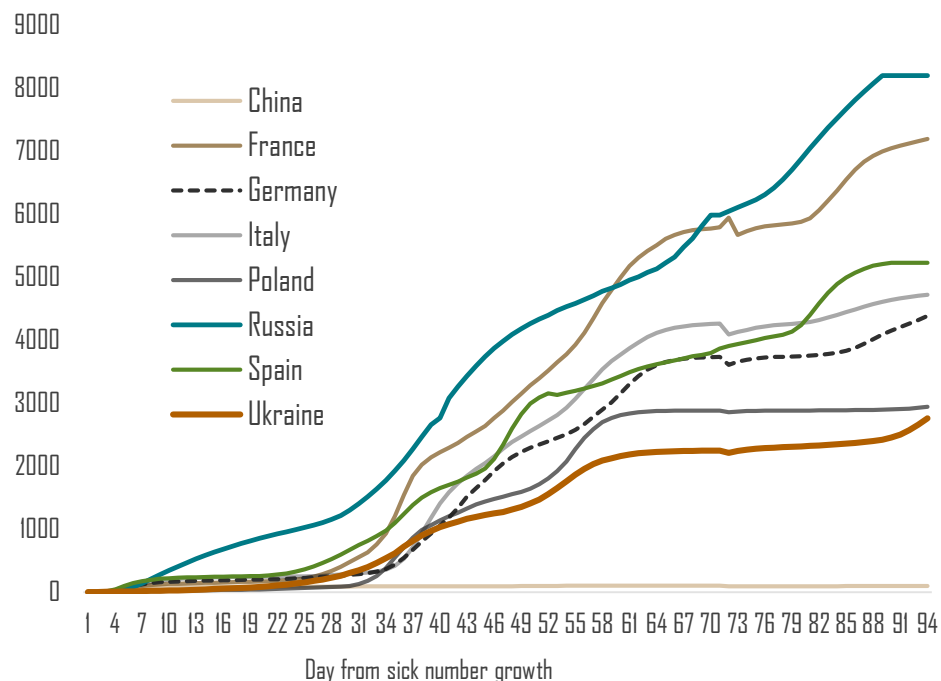
Quarantine in Ukraine will be valid until December 1

New cases dynamic
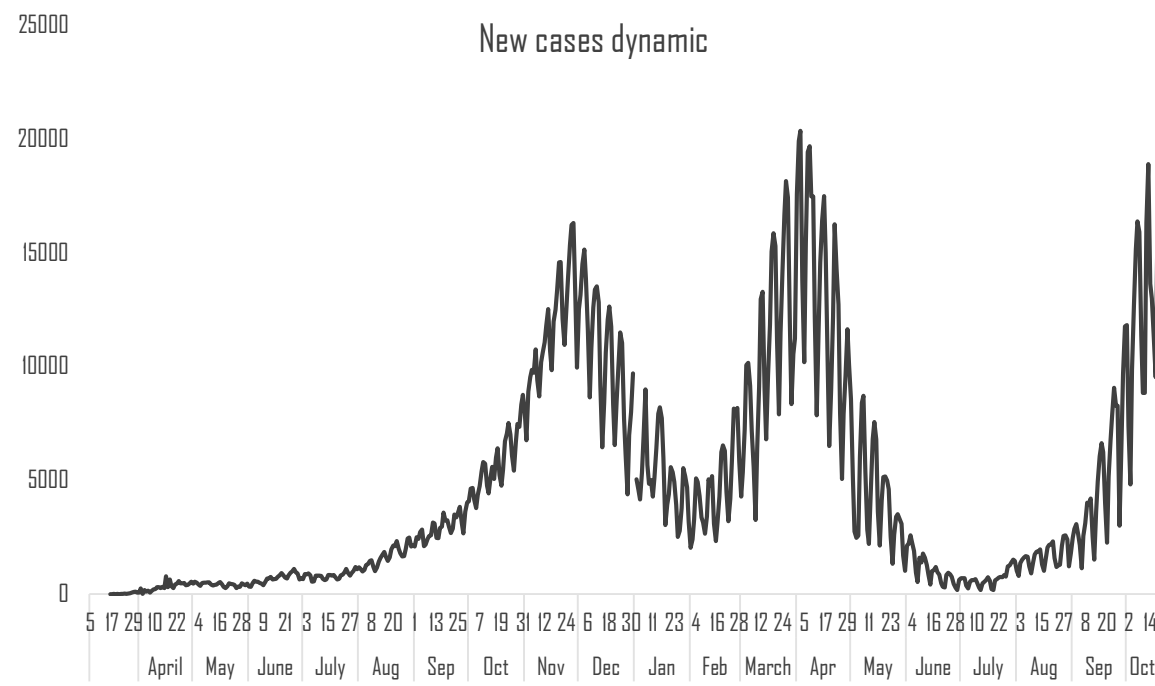
2 469 856 Covid-19 cases in Ukraine

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CONSUMER BEHAVIOUR TRENDS

Google showed the behavior of Ukrainians during the pandemic

o The preferred way of shopping for Ukrainians - online shopping

o In the "Home and Garden" category, buyers mostly want to buy a new product to replace the existing one, and in the "Fashion" category, the volume of spontaneous purchases is growing
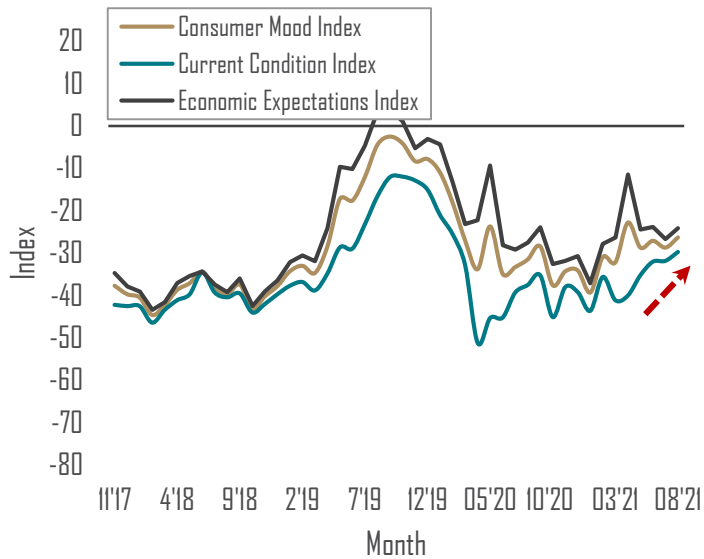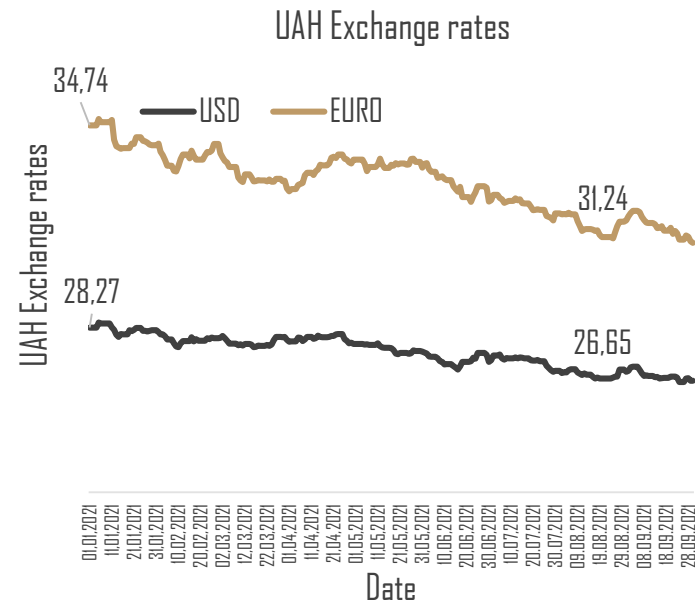
o The share of online purchases increased in all age categories, especially among Generation Z (18-24) - up to **43%**, and Ukrainians aged 45 to 54 - also up to **43%**.

o Internet search remains the preferred method of searching for product information before purchasing for all product categories (**79%** had searched for information online before making their last purchase)

o Convenience and price are the main reasons why Ukrainians prefer online shopping

o There is an increase in the share of social networks in the search for information about goods

o The share of mobile purchases has grown during the pandemic, so most of all, Ukrainians began to use mobile devices to buy electronics (**40%**) and goods from the "Fashion" category (**46%**)

SOURCE

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FINANCIAL SITUATION

The slight increase of the indicator is caused by the growth of all indices despite economical expectations

Legend:
- Consumer Mood Index
- Current Condition Index
- Economic Expectations Index

Y-axis: Index (20, 10, 0, -10, -20, -30, -40, -50, -60, -70, -80)
X-axis: Month (11'17, 4'18, 9'18, 2'19, 7'19, 12'19, 05'20, 10'20, 03'21, 08'21)

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

UAH Exchange rates

Legend: USD, EURO

34,74 ... 31,24 (EURO)
28,27 ... 26,65 (USD)

Y-axis: UAH Exchange rates
X-axis: Date (01.01.2021 ... 28.09.2021)

Recovery in economic activity contributes to the normalization of indicators

NOW

5,4% GDP
In QI'2021 vs QI'2020 SSC

+7,5% Inflation
in Jan-Aug'21 SSC

-2,2% real salary
In Aug21 vs Jul'21 SSC

THEN

+3,7% GDP growth in 2021
(-4% in 2020)

+9% Inflation in 2021
(+5% in 2020)

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

Source: InfoSapience; MinFin Ukraine, IMF , SSC Ukraine, Ministry of Economy Ukraine

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CONSUMER BEHAVIOUR TRENDS

Consumers trust the recommendations of their acquaintances more than influencers

Consumers say they are more likely to accept product recommendations from the average user (**37%**) than from subject matter experts (**25%**), celebrities (**7%**), social media stars (**6%**), or even their own. the brand's social media account (**8%**).

Consumers take authenticity seriously.

Influencers should be sure to disclose whether they've edited images and believe that those who violate these rules should be permanently (**23%**) or temporarily banned (**23%**) from accessing platforms to be denied monetize content in the future (**21%**) or threaten with a fine (**15%**).

Users are ready to give personal data to companies they trust

Ukrainians want to know how the information will be used and what they will get in return.

Significance, Memorability, Controllability – 3 main principles that will help maintain data privacy and make ads effective.

CONSUMER BEHAVIOUR TRENDS

Consumer spending in retail applications increased by 154%

Remarketing grew by **132%** in the fourth quarter of 2020.

Consumer spending increased by **154%** compared to the previous year.

Consumers get a more positive impression from online shopping

More than half (**53%**) of consumers worldwide said that they have been positively impressed by e-commerce since the COVID-19 pandemic began.

Only **18%** of people are positive about shopping in stores.

Sostav.ua   SOURCE

Sostav.ua   SOURCE

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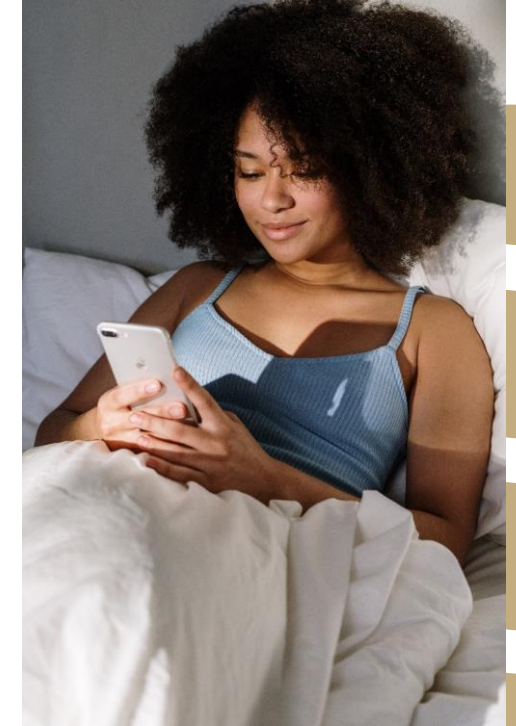
MEDIA FOCUS
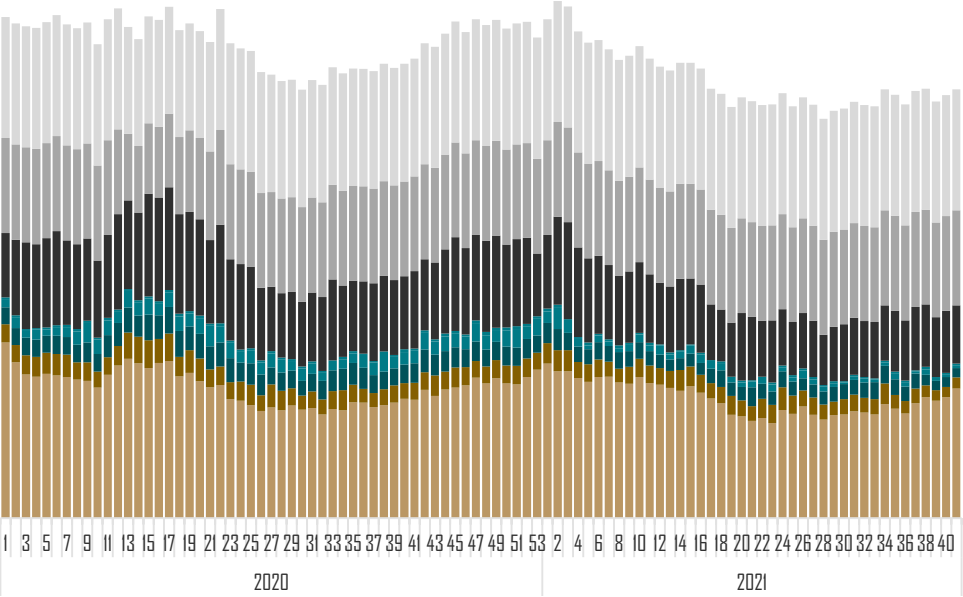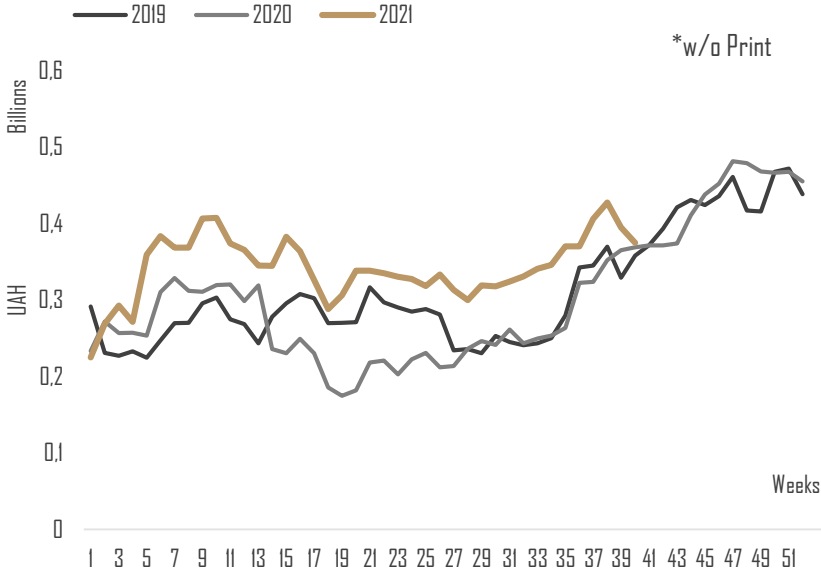
Ukrainian Media Market

MEDIA INVESTMENTS IN 2021 IS ALREADY HIGHER VS 2020

Video consumption has fall but seasonal growth is expected

Legend: TV ■ YouTube ■ Facebook ■ Instagram ■ Online TV ■ Other Digital ■ OOH ■ Radio

2020   2021

The investment dynamics is recover

Legend: 2019 — 2020 — 2021

*w/o Print

Billions / UAH / Weeks

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MEDIA MARKET TRENDS

Video game ad spend grows 17% in half a year

The consoles and streaming platforms Steam, Twitch, Xbox and Nintendo Switch have seen even greater growth.

In aggregate, the sector spent on advertising this year by **36%** more than a year earlier - $ 45 million versus $ 33 million, respectively.

"Although TV spending in 2020 accounted for the bulk of 51%, advertising for game consoles and streaming services increased to **42%** in 2021."

Revealed: the top-ranking media channels and brands in 2021

The net change in the budgets of other traditional media will be negative. Advertisements in newspapers (**-55%**) and magazines (**-53%**) are expected to suffer the most. Cinema ads (**-20%**), brand-sponsored events (**-18%**) and radio ads (**-8%**) are also expected to be in the red.

Online video advertising, influencers and social media is expected to experience big positive changes (percentage of marketers who increase their budget minus the percentage of those who cut their budget).

Sostav.ua SOURCE

AMP SOURCE

TV

Monthly Trends

+9% 2021 vs 2020

+7% Sep 2021 to Aug 2021

100% SOR in Sep 2021

Dynamic is similar to previous years

TV DA, '000 EqGRP

— 2019 — 2020 — 2021

Weeks
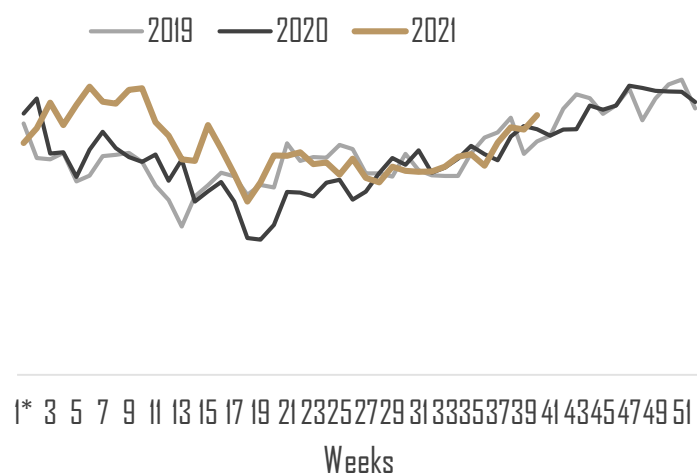
Sold-Out is 99% on 40w

Premium TV shows Sold-Out 100% while TvoE TV on 100% level

TV SOR, %
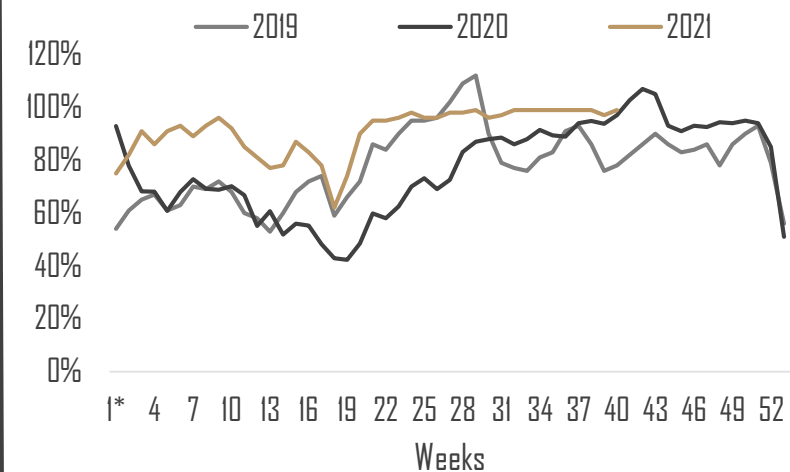
— 2019 — 2020 — 2021

Weeks

TV

Monthly Dynamic

Finance category grew almost in 2 times

Pharma category grew mostly thanks to Pharmak

TOP Categories

	2021 vs 2020	Sepl'21 vs Aug'21
pharma	317	18%	40%
food	67	9%	14%
hygiene	55	-3%	-42%
confectionery	55	1%	86%
cosmetics	55	5%	18%
trade	53	13%	18%
detergent	38	11%	-13%
telecom	37	-16%	-19%
finance	37	97%	16%
cold afb	34	4%	-37%

TOP Advertisers

	2021 vs 2020	Sepl'21 vs Aug'21
L'oreal	39 300	13%	12%
Procter&Gamble	37 176		-21%
Nestle	35 953	-6%	-19%
Pharmak	35 944	20%	210%
PepsiCo	22 728	-14%	-1%
Sanofi	21 815	74%	-48%
Reckitt Benckiser	21 792	-24%	31%
Henkel	17 426	1%	-22%
Unilever	15 682	55%	-9%
Gladpharm	15 505	-2%	-26%

TV KEY NEWS

## What we know about the context and positioning of TV ads

The positioning of television advertising, whether first in the ad break, 'mid-pod' or the last commercial can have varying degrees of effect and resonance with viewers. Further, the placement of ads adjacent to contextually relevant programming can enhance the impact of the communication on the viewer, with new technologies enabling this process to achieve greater results.

Online-born businesses fueling TV advertising

An e-commerce explosion is delivering knock-on benefits for traditional TV advertising spend, seeing an influx of online-born businesses, according to analysis conducted by Thinkbox. The marketing body for commercial TV in the UK calculates that invested in TV advertising by online businesses between January and July 2021 increase on **37%** from the equivalent period in 2019.

SOURCE **WARC**

The Drum. SOURCE

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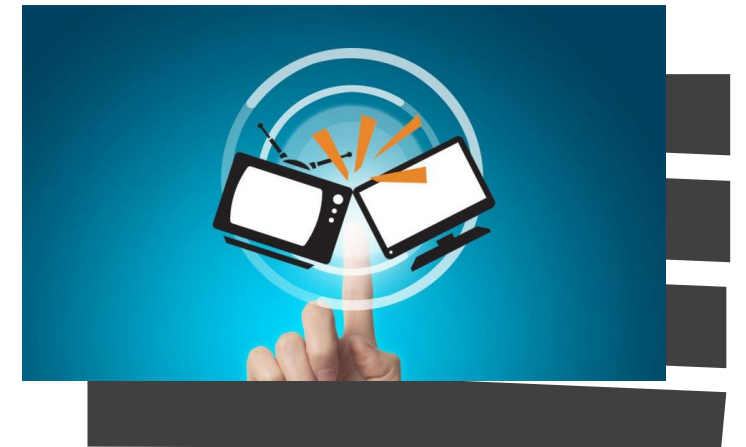
DIGITAL

Monthly Dynamic

Display adv decreased by 2%

Video adv decreased by 27%

in 2021 vs 2020

TOP VIDEO

Categories 2021 vs 2020

Category	Value	2021 vs 2020
finance	991	2%
entertainment	967	14%
trade	865	-31%
pharma	312	-59%
it	285	-29%
restaurants	235	-10%
education	215	43%
confectionery	210	-21%
alcohol	209	-5%
cold afb	205	-23%

Advertisers 2021 vs 2020

Advertiser	Value	2021 vs 2020
UNL	630	6%
Rozetka.ua	441	-10%
PariMatch	262	10%
SPACEIKS	256	100%
Melbet	244	660%
Vulcan	156	8674%
L'oreal	151	-41%
Na Urok	125	153%
Youtube.com	112	-40%
Nestle	110	8%

TOP DISPLAY

Categories 2021 vs 2020

Category	Value	2021 vs 2020
trade	4 728	-21%
finance	3 712	55%
auto	1 522	10%
it	898	57%
education	570	42%
realty	515	-18%
entertainment	490	-40%
tobacco	425	11%
pharma	409	-37%
telecom	371	-32%

Advertisers 2021 vs 2020

Advertiser	Value	2021 vs 2020
Rozetka.ua	1 665	11%
Pari-Match	908	116%
1xbet	641	353%
Nestle	422	-15%
Favbet	398	-13%
Philip Morris	325	33%
Foxtrot	310	-59%
Answear.ua	291	-36%
Fan Sport	256	56%
Serfing.pp.ua	227	8907%

Source: Kantar, mln Impressions

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DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

The new publisher spec library and custom viewability metrics on YouTube in CM360

Google launched a publisher spec library in which you can upload creative and ensure that its attributes meet the minimum requirements for specific publishers. Also, new custom viewability metrics on YT inventory in CM 360 will help you measure viewability across different inventory.
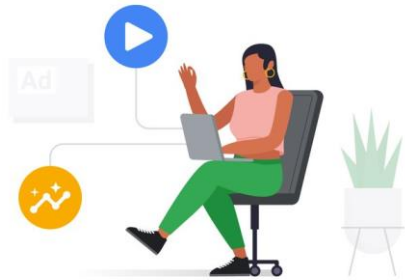

Ad Network Era of Media Buying

Over **80%** of display advertising is purchased through programmatic platforms. With your data and inventory expertise you can find lookalike audiences in cost-effective media channels and target them with the same efficiency.

Bring performance and privacy together with Server-Side Tagging

Server-Side Tagging in Google Tag Manager allows you to move measurement and advertising tags off your website and into a secure server container.

# DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS
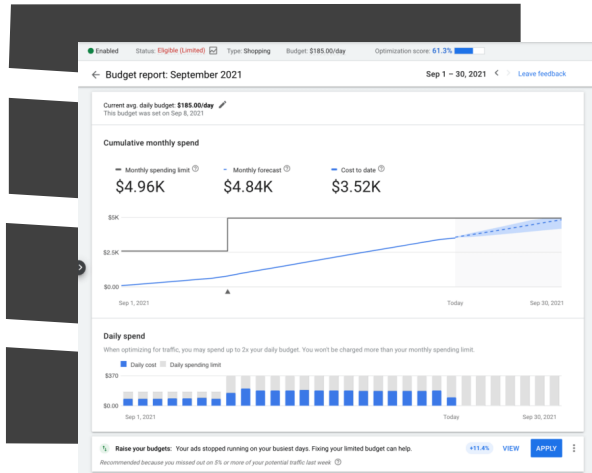
Google Ads launches new budget report

The report shows daily spend, monthly spending limit, monthly spend forecast, cost to date and budget changes you've made that particular month.

Google's new DDA solution seems to offer more attribution options even for smaller accounts

Data-driven attribution will soon be the default attribution model for all new Google Ads conversion actions. By comparing the paths of customers who convert to the paths of customers who don't, the model identifies patterns among those ad interactions that lead to conversions.
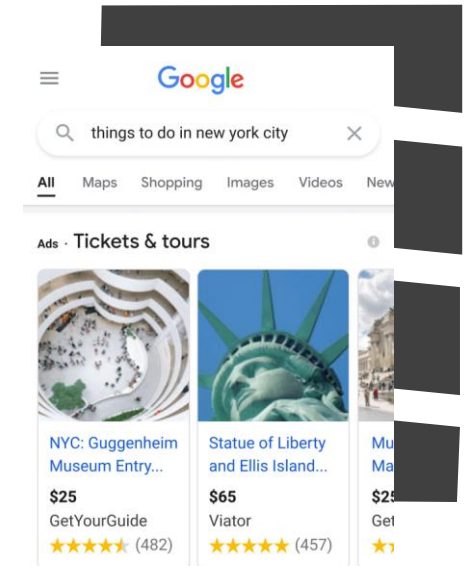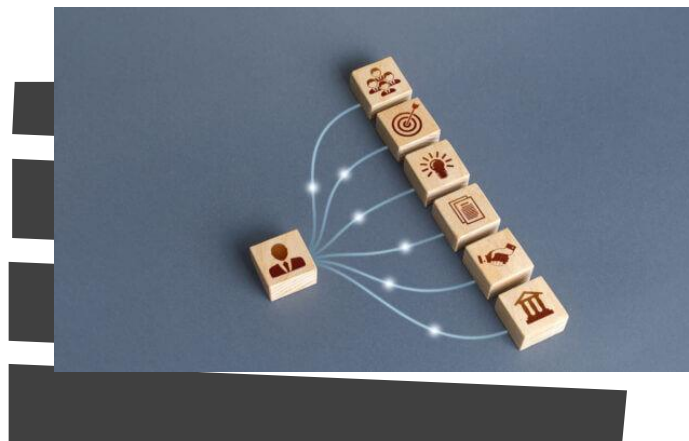
Google Ads has a new search ad format - Things to do

When users will search for attractions, tours, vacations, Google will also show them block Tickets&Tours where will be a new ad format "ThingsToDo" with a photo, price, company and link to the booking.

DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

The problems cascaded to affect the servers that advertise Facebook's DNS and BGP information. That failure wiped out the DNS routing information that Facebook needs to allow other networks to find its sites.

Facebook has finally given a reason for the six-hour outage Monday

Facebook said in a blog post that the six-hour outage that took it offline, along with Instagram, Messenger, WhatsApp, and OculusVR, was the result of a configuration change to its routers — not of a hack or attempt to get at user data.

The company is bringing other new features to the messaging apps in addition to cross-app group messaging. Polls will be available in group DMs on Instagram and in cross-app chats so you can, for example, vote on where to grab lunch. Facebook has added group typing indicators to Messenger, so you can see when multiple people are drafting a message. (It's unclear from Facebook's blog post if group typing indicators are coming to Instagram as well, but I've asked the company to clarify that.) And you can now use Facebook's Watch Together feature to watch videos from your Instagram feed with your friends.

Facebook will now let you make group chats across Instagram and Messenger

The update is a big step forward in Facebook's ambitions to make its apps work better with each other. To be able to use the cross-app communications, you'll have to opt in, and Facebook says that "over 70% of eligible people on Instagram have updated to the new Messenger experience."

Yuliia Bilinska
Middle SMM Specialist
Performics

SOURCE **THE VERGE**

THE VERGE SOURCE

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DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS
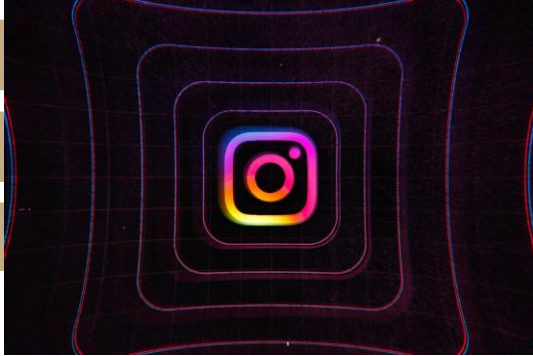
It's not clear whether this Favorites feature will become an official feature at all or if it will change before it's rolled out more broadly. For now, Instagram says it "is an internal prototype that's still in development, and not testing externally." Perhaps in the future, you just might see this feature in your account menu, just below "Close Friends" — a feature that lets you control who you share your Stories.

Instagram is testing new 'Favorites' to bring order to your chaotic feed

It seems Instagram is well aware of your plight, because it is quietly testing out a solution for your messy feed called "Favorites."
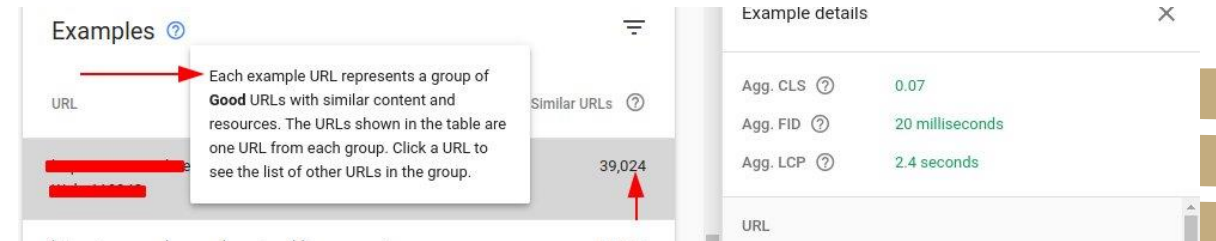
Yuliia Bilinska
Middle SMM Specialist
Performics

Google added more data to Core Web Vitals report in Search Console

The Core Web Vitals report in Google Search Console now has more detailed scoring data for URL groups in the Sample Details section.

You can see them when you click on a specific group of URLs in the report. However, information is provided not for individual URLs, but for groups of pages. It is assumed that problems on similar pages arise for similar reasons.

Examples ⑦

Each example URL represents a group of **Good** URLs with similar content and resources. The URLs shown in the table are one URL from each group. Click a URL to see the list of other URLs in the group.

URL   Similar URLs ⑦

39,024

Example details   ✕

Agg. CLS ⑦   0.07
Agg. FID ⑦   20 milliseconds
Agg. LCP ⑦   2.4 seconds

URL

SOURCE   THE VERGE

SEOnews   SOURCE

PUBLICIS GROUPE

DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Google: two new documents with rules for writing Title and description

Google introduced two new help documents on titles and descriptions in Google Search.

New docs in Google Help:

○ Title

○ Description

Anastasiia Zdoryk
Head of SEO
Department

Interesting about Title:

1. Each page of the site has a Title, which is specified in the <title> tag.
2. Absence of vague descriptions of the page in the Title (Home page, Profile) and too long descriptions - they will be cut off.
3. Absence of over spamming of keys, repetitive or template text.
5. Adding the brand name to the Title at the beginning or at the end. Separate it with a dash, colon, or pipe.
6. Caution in prohibiting page scanning. Using the robots.txt protocol can interfere with crawling, but it does not always prevent indexing. To prevent the URL from being indexed, you can use the noindex directive.

Interesting about Description:

1. Google can show different snippets for different queries.
2. Site owners can offer content for snippets using micro-markup and correctly filling in the description meta tag.
3. Google doesn't always use text for description in snippets from <meta name = "description">.
4. There are no restrictions on the amount of text in the description. But it can be cropped in search results as needed, usually due to device width. To limit the length of a snippet, use the max-snippet: [number] meta tag. You can also select text on the page that you don't want to show in the snippet in Google Search using the data-nosnippet attribute.

SOURCE Журнал

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DIGITAL | CONTENT | PPC | ECOMMERCE KEY NEWS

Google Help has updated pagination guidelines

There are clear preferences for canonicals, for example:

"Don't use the first page of a paginated sequence as the canonical page. Instead, give each page in its own canonical URL."

Google has made a whole section with recommendations and practical advice on e-commerce websites - micro-markup and URL structure

Pagination   **Load More**   **Infinite Scroll**

Anastasiia Zdoryk
Head of SEO
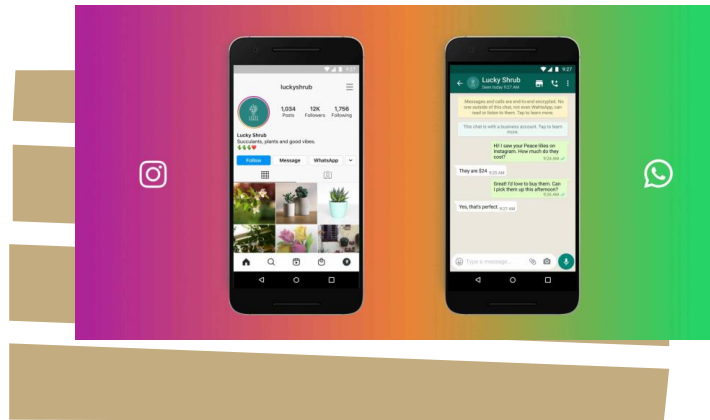Department

Facebook announced Instagram-Driven Ads on WhatsApp

Advertisers will be able to chat in WhatsApp from their Instagram profile, as well as communicate with the client using ads that lead to the WhatsApp directly.
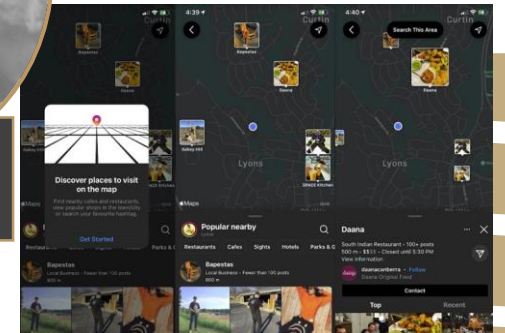

Instagram will launch a new tool - "Search on the map"

Instagram began testing a new function "Search by Map", which will allow users to find companies and interesting places on the map in the application, as well as information about them

There is no information yet on when this update will be available everywhere.

Christina Ilchishina
Digital Planning Group
Head

OOH

OOH market increased in monitored inventory by 90% vs same period 2020

TOP Categories

2021 vs 2020

Category	Value	%
trade	778	89%
realty	430	86%
entertainment	238	85%
auto	230	79%
medicine	154	146%
sport	115	46%
restaurants	94	72%
telecom	92	104%
it	87	141%
finance	83	24%

TOP Advertisers

2021 vs 2020

Advertiser	Value	%
Sport Life	76	25%
Fozzy Group	72	125%
Epicenter	66	128%
Integral Bud	56	245%
Metro	39	41%
Lifecell	35	117%
Winner Imports Ukraine	28	473%
IDS Group	26	244%
Riel	25	-27%
Mcdonald's	23	11%

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

PUBLICIS GROUPE

OOH KEY NEWS

Publicis Luxe created a DOOH campaign to promote the launch of the Balenciaga store in Fortnite.

Publicis Luxe brought Balenciaga to online game Fortnite, where the brand created its own digital fashion world with its Fall / Winter 2021-22 collection. 3D XXL animation is displayed on giant billboards in London, New York, Tokyo and Seoul. The billboards will also be integrated into the Fortnite game itself for the first time.

SOURCE

3D content with hologram effect was launched on the largest screen in Europe

Residents and guests of Kiev can admire a giant spaceship at the Gulliver shopping center. Also, sound effect are testing on location.

SOURCE

PUBLICIS GROUPE

OOH KEY NEWS

Clear Channel Outdoor Americas has launched a new sales channel - Hivestack SSP
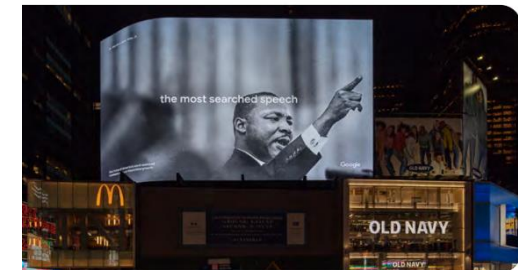
A new sales channel for advertisers has access to digital billboards, media facades, screens in airports, bus stations and retail stations. The inventory in the entire park of constructions, which will be pro-protonated before the purchase of algorithms, is 100 million units. It's allowed digital marketers to easily know, to estimate the effectiveness of CCOA's noses in order with the inventory of the largest channels, where sales also work algorithmically.

The American Association of Out-of-Home Media (OAAA) has expanded the OOH Creative Best Practice booklet with recommendations for more cool campaigns.

Five chapters in it are described throughout the process of breaking up the plot for the latest advertisements - from the creative idea to the evaluation of the results of the campaign. And among them - the location, format, design, integration with the other media, testing "and what a good ..." and those hooking up projects for campaigns that will be deprived of memory and history.
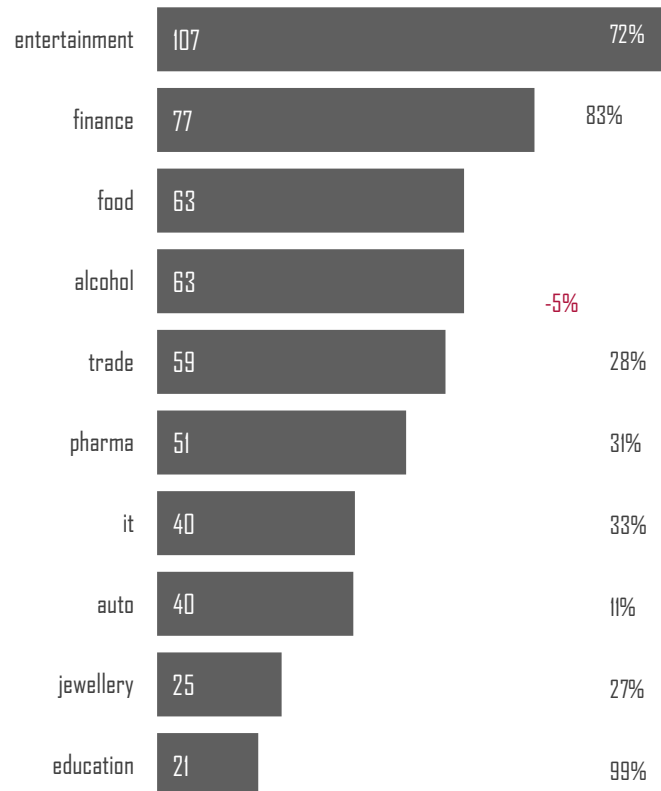
RADIO

Radio market increased by 40% vs Jan-Sep'20

Education increased almost twice vs 2020

TOP Categories

2021 vs 2020

Category	Value	%
entertainment	107	72%
finance	77	83%
food	63	
alcohol	63	-5%
trade	59	28%
pharma	51	31%
it	40	33%
auto	40	11%
jewellery	25	27%
education	21	99%

TOP Advertisers

2021 vs 2020

Advertiser	Value	%
Bayadera	40	-15%
Victor& Co	32	
Radioplayer	25	49%
Radio Lux	24	63%
Favbet	22	140%
PariMatch	22	67%
Gidrosend	21	28%
Khladoprom	15	219%
Zolotyi Vik	14	24%
Alef	12	18%