

THINKING ABOUT RECOVERY

GroupM EMEA Recovery Study - SPAIN

1. ESTUDIO CLIENTES

ESTUDIO CLIENTES

Online interviews among GroupM clients

Length of interview: 10 minutes

Sample size: n=593

Fieldwork period: May 2020

	Sample size by country
Austria	29
Belgium	2
Croatia	10
Czech Republic	74
Denmark	2
UK	34
Finland	4
France	14
Germany	35
Hungary	12
Italy	26
Ukraine	2
Netherlands	21
Nordics	4
Norway	5
Poland	40
Portugal	46
United Arab Emirates	2
Romania	6
Russia	25
Saudi Arabia	5
Servia	12
Slovak Republic	16
South Africa	17
Spain	57
Sweden	4
Switzerland	7
Turkey	82
TOTAL	593

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EL CONFINAMIENTO HA SIDO MÁS DURO EN ESPAÑA, CON MÁS DE LA MITAD DE LOS NEGOCIOS MUY AFECTADOS

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CONSUMER SPENDING

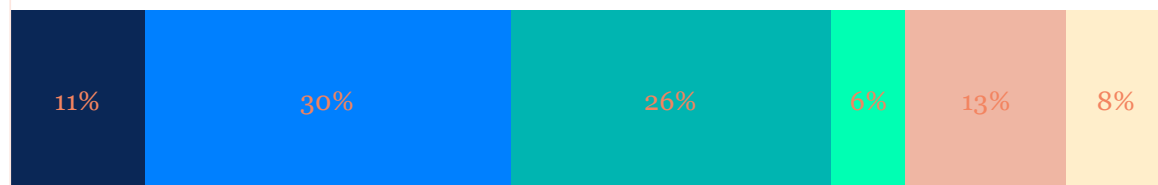
■ Shops closed ■ Significantly reduced ■ Somewhat reduced ■ The same ■ Somewhat increased ■ Significantly increased



Spain



EMEA

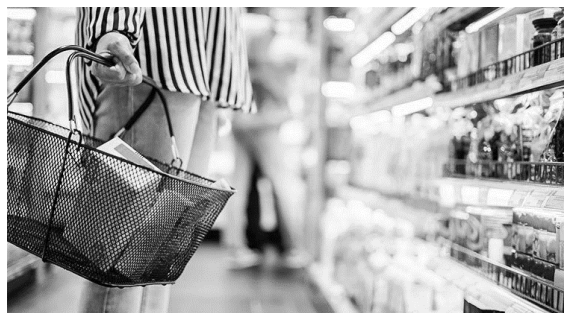


SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA and 57 in Spain) – May 2020. Q.3. Now let's think about your company. How has lockdown period changed the habits of your consumers?

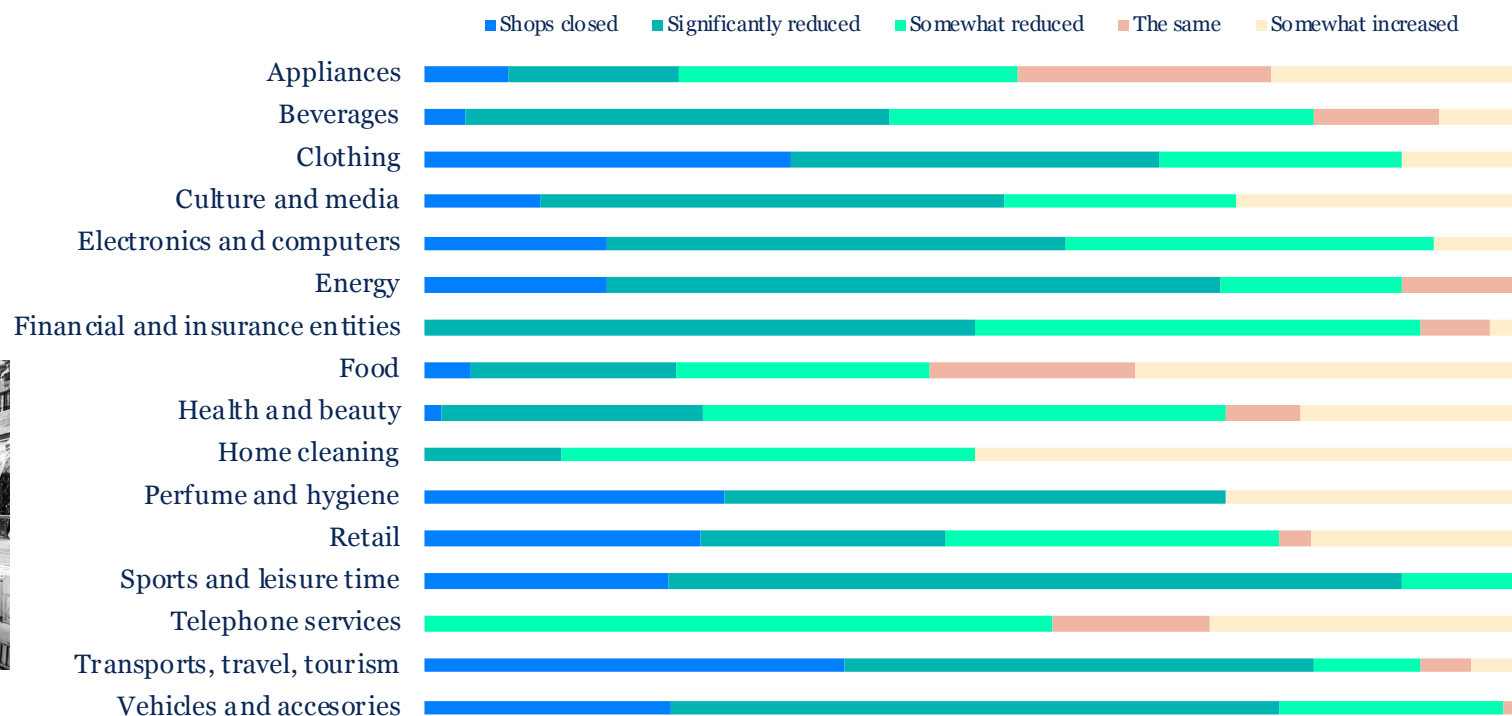
GRANDES DIFERENCIAS POR SECTORES

Viajes/turismos, automoción, deporte/tiempo libre, ropa entre los más afectados

Finanzas, telefonía, alimentación o limpieza no se han visto tan afectados



CONSUMER SPENDING - EMEA

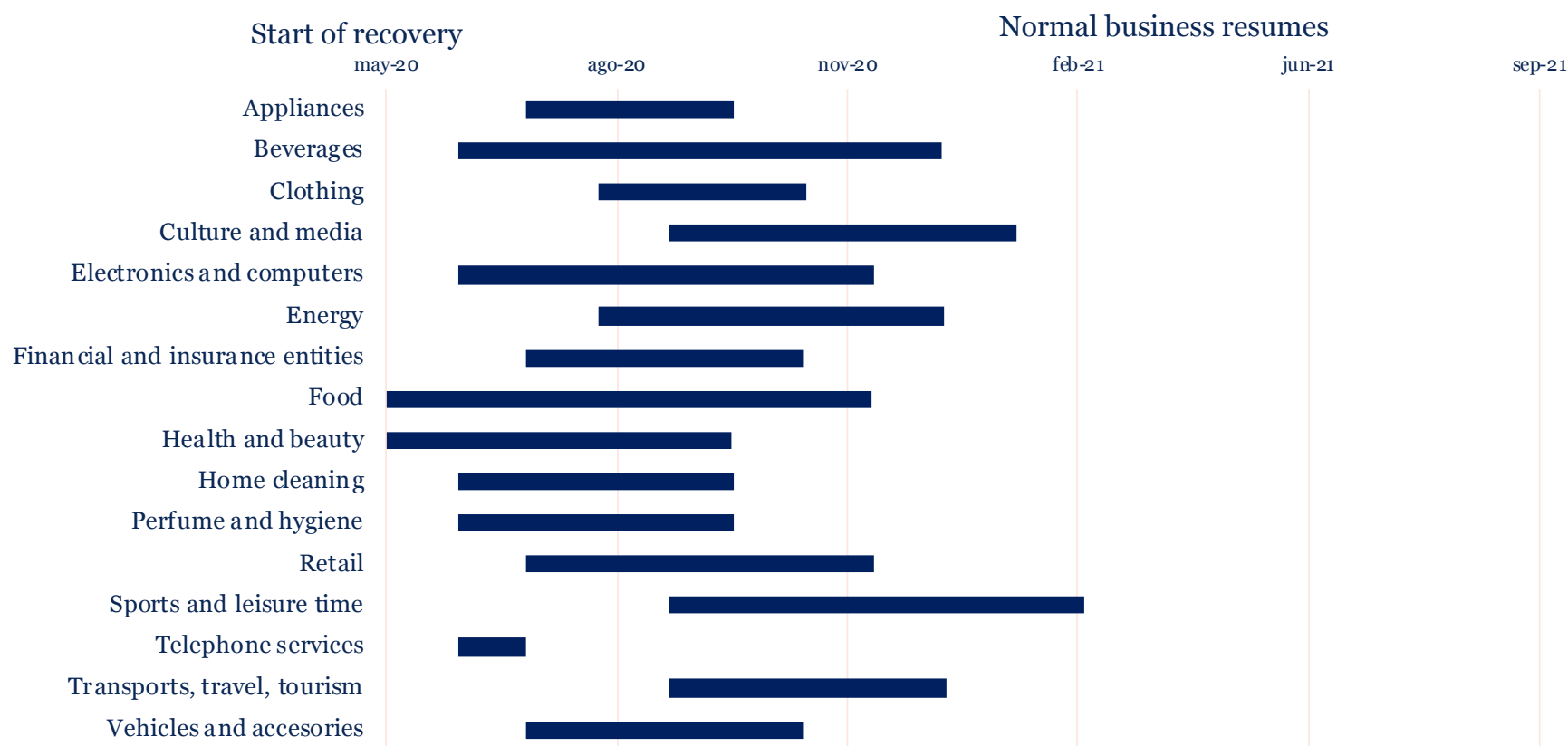


SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA) – May 2020. Q.3. Now let's think about your company. How has lockdown period changed the habits of your consumers?

LA INVERSIÓN PUBLICITARIA SE RECUPERARÁ DE FORMA DISTINTA POR SECTORES

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ADVERTISING SPENDING RECOVERY PERIOD - EMEA

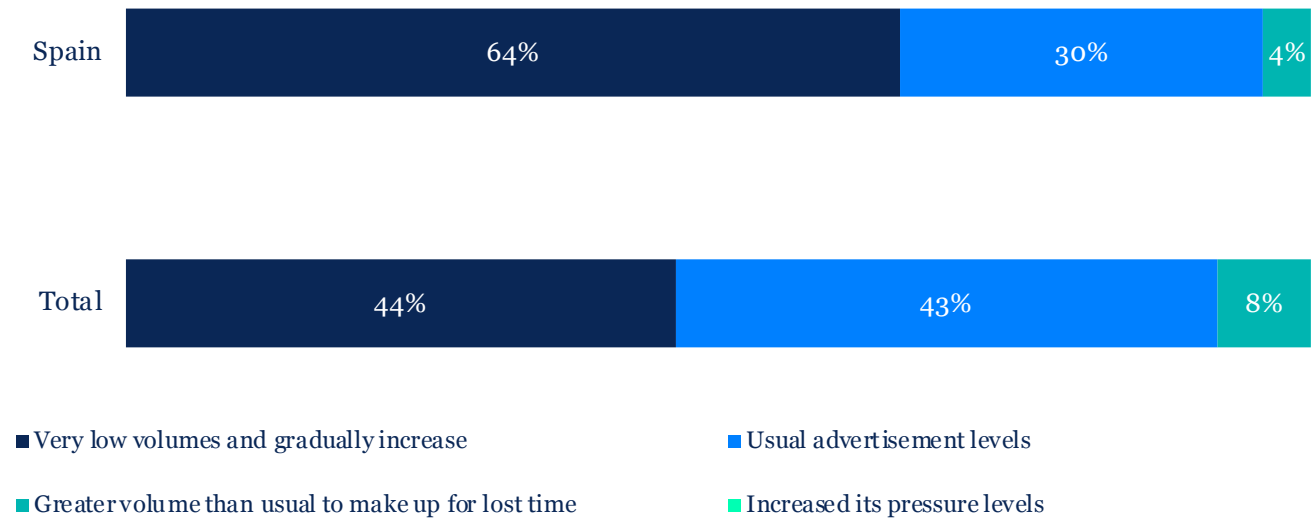


SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA) – May 2020. Q.6. When do you expect to hit the following milestones in your business' advertisement and communication?

LAS INVERSIONES PUBLICITARIAS COMENZARÁN CON CAUTELA, ESPECIALMENTE EN ESPAÑA

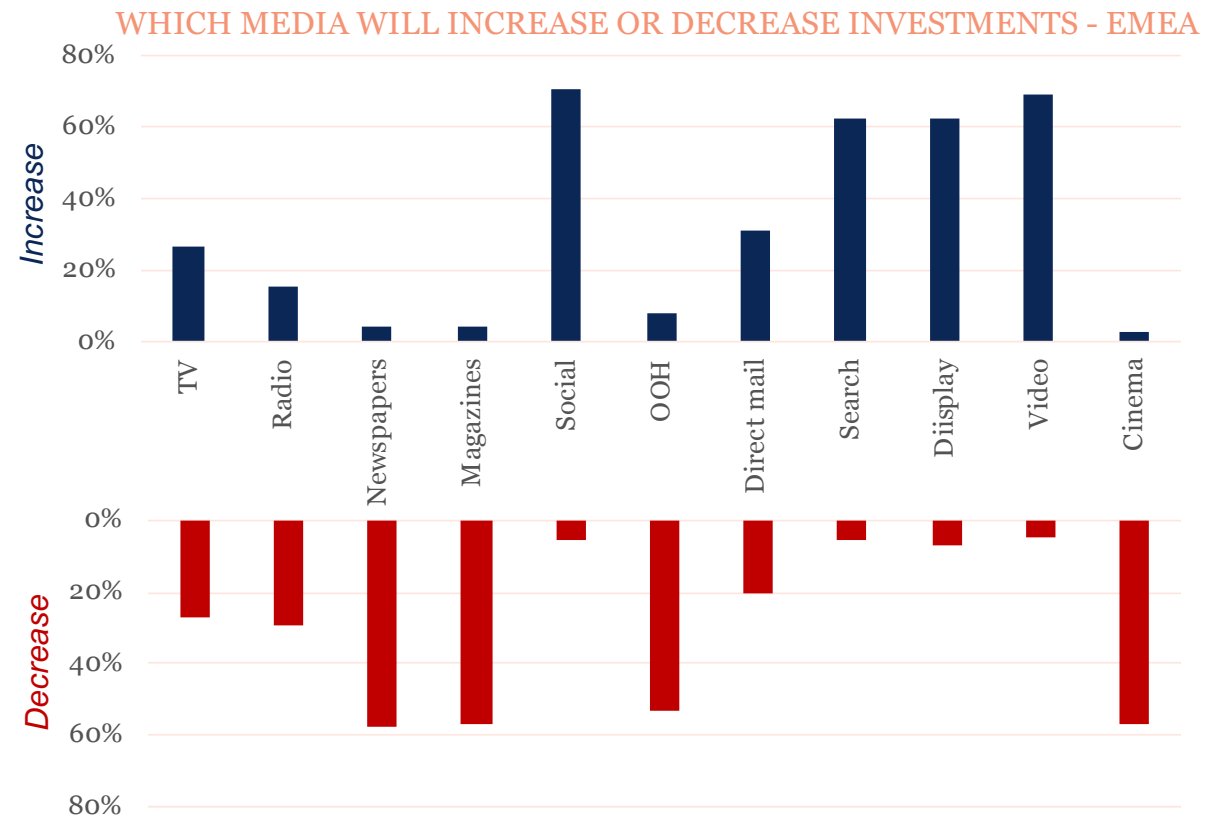
ADVERTISING VOLUME POST-LOCKDOWN

The beginnings in advertising investment will be cautious, especially in Spain, although a significant volume of advertisers will resume activity with the usual levels



SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA and 57 in Spain) – May 2020. Q7. *What volume of advertisement do you expect for your business post-lockdown?*

EL MEDIO DIGITAL ES EL CLARO GANADOR EN EL NUEVO MEDIA MIX ^{groupm}



SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA) – May 2020. Q8. *What do you expect the media mix to be like?*

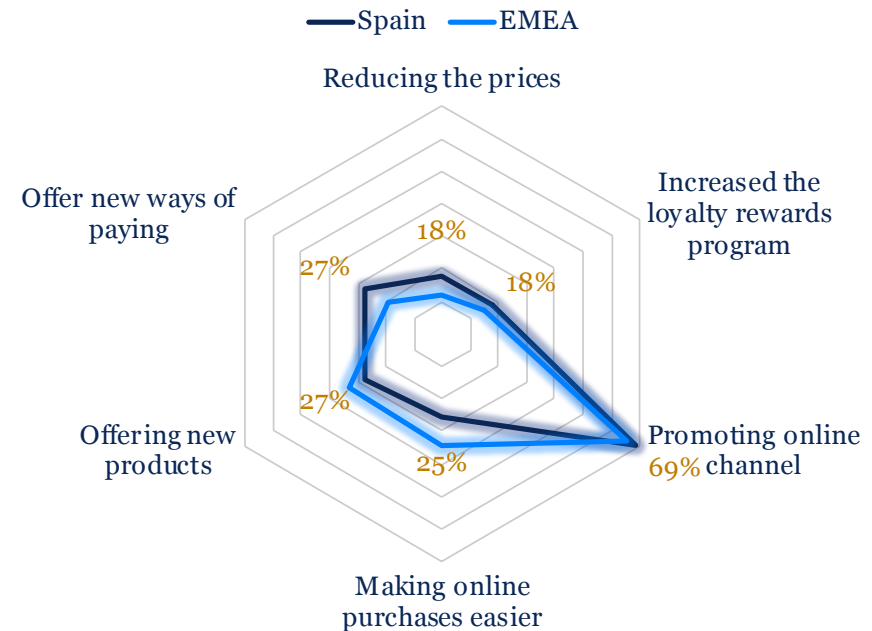
EL CANAL ONLINE ES LA PRIORIDAD ABSOLUTA DE NUESTROS CLIENTES EN LA NUEVA NORMALIDAD

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Companies have to help the consumer, looking for new ways to encourage consumption. Continuing to grow in e-commerce is the common way for all categories. In Spain, companies plan new ways to pay vs. offer new products.



POST- LOCKDOWN COMPANY PLANS



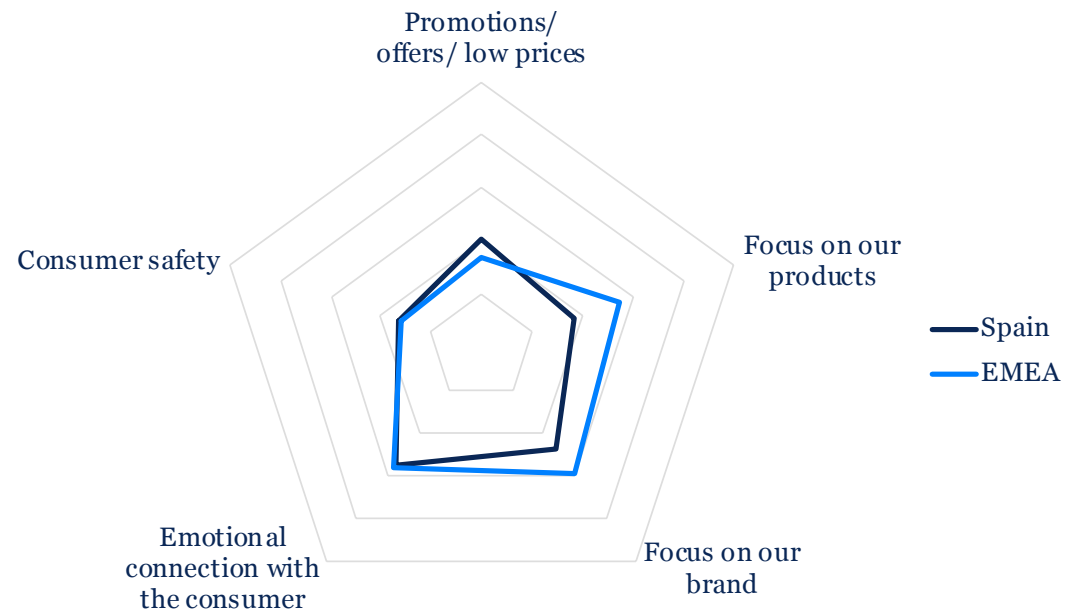
SOURCE: GroupM Recovery Study EMEA (n=593 advertisers in EMEA and 57 in Spain) – May 2020. Q.4. Which of the following is your planning to implement post-lockdown?

MENSAJES PARA RECONECTAR CON LOS CONSUMIDORES Y VOLVER A HABLAR DE LA MARCA Y LOS PRODUCTOS

In Spain, messages will focus in connect with the consumer, be emotional, and in promotions/offers, vs. products and brand, the main message in all the countries.



POST-LOCKDOWN MESSAGES



CONCLUSIONES

- Para nuestros clientes, el futuro es una oportunidad para cambiar y reinventarse
- El consumidor y lo digital son los principales protagonistas de este futuro
- El pronóstico es optimista, aunque hay muchas dudas y diferencias entre sectores, la recuperación se prevé en 2021.
- El camino será lento, aunque la publicidad jugará un papel clave en la reacción
- Ser capaz de conectar con el consumidor, con planes que faciliten esta relación, será la base de esta nueva realidad