

# WORLD BEHIND THE BUBBLE

What to avoid in media planning and why it's better not to rely on the "proven" method: judging others by your own standards.

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# MEDIA BUBBLES PROJECT 2.0

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**online questionnaire**

23. 9. – 4. 10. 2021

**Media Agencies** – GroupM agencies' employees; **N = 167**

**Clients** – our clients, advertisers; **N = 114**

**Czech Online Population** – Czech National Panel; **N = 1 018**

# PROJECT BACKGROUND

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## Why did we start this project

Although we have increasingly sophisticated tools that process not only consumer media data, let's admit that we often slip into doing or deciding something based on our "experience, feelings, intuition." After all, we live in the same world and consume the same media and we are consumers too. But relying on your experience in media planning and marketing could be dangerous, because the media and especially consumer habits of people in media agencies and marketers in general are often fundamentally different from the general population.

We state this as a fact. Because we found out that this is the case in the pilot wave of the project in 2019. In the second wave (2021), we used the same principle (same questionnaire for evaluating media habits for media agencies, their clients and the general online population), but we have taken the matter from a greater breadth and added more data from both public and GroupM sources.

## Definition of group descriptions used in the charts

**General population** = Czech online population sample representative by gender, age, education, region and settlement size, those with internet access and 15+ y.o. That is more than 90% of the 15+ y.o. population in the Czech Republic. Data collected on Czech National Panel.

**Media Agencies** = employees of media agencies Wavemaker, Mediacom, Mindshare, GroupM and H1.

**Clients, advertisers** = representatives from GroupM, Wavemaker, Mediacom, Mindshare and H1 clients.

## Sources

The data come from the 2<sup>nd</sup> wave of the Media Bubbles project carried out by GroupM, unless stated otherwise.

# SUMMARY

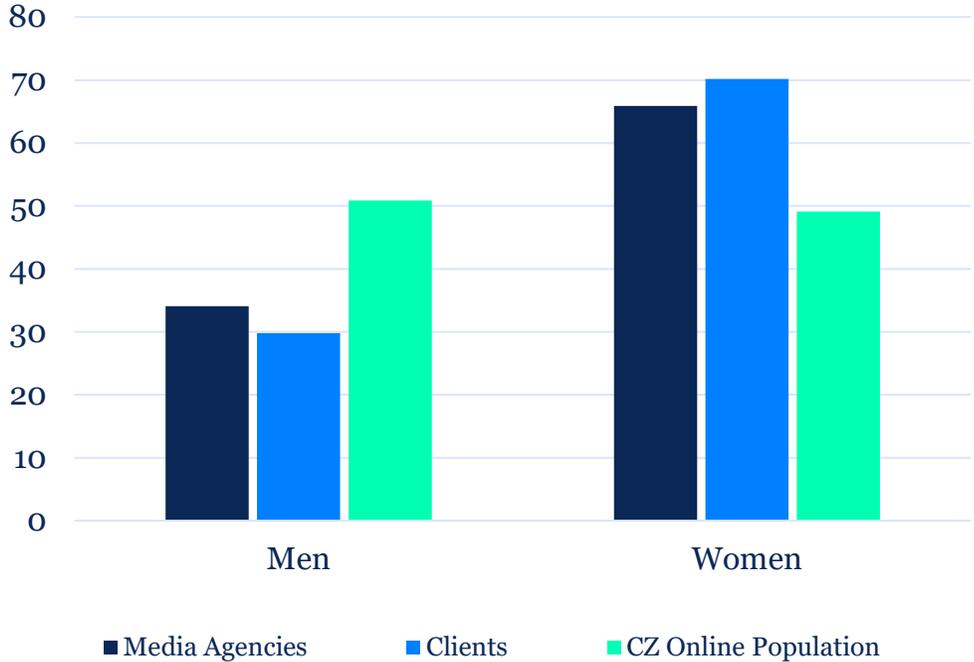
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If you do not have time to read it completely

# HOW DOES OUR BUBBLE DEMOGRAPHICS DIFFER FROM THE POPULATION

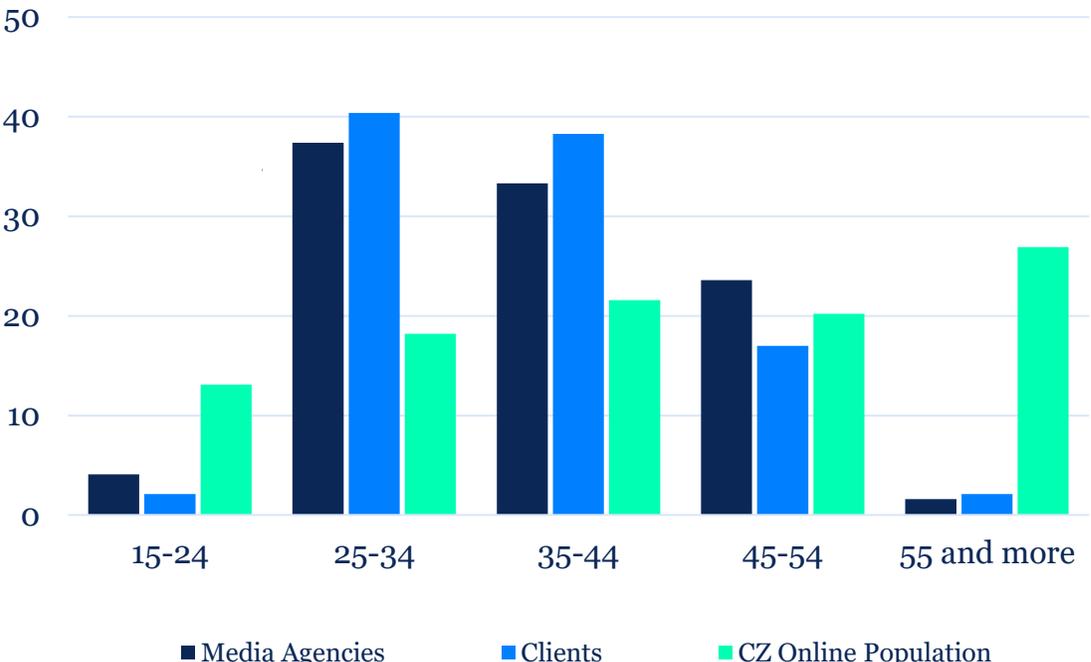
While the predominance of women can be found in many other professions, a large age deviation compared to the general Czech population is of greater importance. And as you can find out on the following pages, our media habits are in many respects much younger than is our average calendar age.

**Gender | in %**



n=167/114/1018

**Age | in %**



*In the report, we divided the general population into 3 age subgroups (15-24, 25-44 and 45+). As most media agencies workers and clients are in the 25 – 44 y.o. age group, we can compare it with the population in this way most effectively.*

## WHAT DO MEDIA AGENCIES AND THEIR CLIENTS DO DIFFERENTLY?

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### Forever young = upto 30 y.o. max.

- We really do love influencers
- We just can't live without Instagram
- We can easily survive without TV broadcast
- We do not miss anything on Netflix and HBO
- We love listening to the music and podcasts in apps or on the Internet
- YT and FB are a bit boring, but we are there quite often – it is a must

### As educated Prague inhabitants

- We usually have a university degree (Prague average is 38%, CZ average, except of Brno, is below 20%)
- We keep an overview of what is happening, we follow the news frequently
- We read books (or at least we try to) – and stick up for them (that they are worth it)
- LinkedIn is our place 24/7 – where else could we show how hard we work and that we are the pillars of our company

## WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE MOST 1/2

Unlike the general population, people in media agencies and their clients do not enjoy classic TV (or delayed broadcasting) but we love watching Netflix or HBO. We also watch online video content more often and do not read newspapers. As a result, our behavior is akin to the youngest age group under 24.

Activity (in %)	KPI	Media Agencies	Clients	General population
Watching TV Broadcasting live	Several times a week	51	48	67
	Daily	27	27	50
Watching free of charge TV Broadcasting via TV stations web pages	Several times a week	18	29	42
	Daily	7	13	27
Watching TV programs or films via paid online video streaming platforms (Netflix, HBO etc.)	Several times a week	57	70	31
	Daily	20	31	17
Watching video content on the Internet (i. e. YouTube etc.)	Several times a week	68	64	53
	Daily	28	30	29
Following the news and information about current affairs on the Internet	Daily	75	77	57
Reading daily newspaper offline	At least once a week	11	3	23

## WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE MOST 2/2

We also listen to music or podcasts much more. We follow influencers intensively and love Instagram. So, we don't have time to go shopping and we like to shop online. Again, we are more like the young Czechs.

Activity (in %)	KPI	Media Agencies	Clients	General population
Listening to the music via Internet or via apps (i.e. Apple Music, Spotify)	Several times a week	61	74	35
	Daily	37	47	22
Listening to or watching podcasts	Several times a week	35	35	18
	Daily	13	12	7
Listening to audio books or any other spoken word	At least once a week	33	32	19
Following influencers	Yes	56	75	22
Using social networks	Daily	80	85	68
Using Instagram	Daily	68	84	42
Shopping online	At least once a month	94	99	72
	At least once a week	37	52	28

## WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE LEAST OR NOT AT ALL

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<b>Activity (in %)</b>	<b>KPI</b>	<b>Media Agencies</b>	<b>Clients</b>	<b>General population</b>
<b>Listening to the radio</b>	<b>Several times a week</b>	<b>50</b>	<b>59</b>	<b>47</b>
	Daily	29	37	31
<b>Reading magazines offline</b>	<b>At least once a month</b>	<b>49</b>	<b>58</b>	<b>48</b>
	Weekly	20	15	26
<b>Social networks are the primary source of information for me</b>	<b>Agreeing with the statement</b>	<b>20</b>	<b>25</b>	<b>27</b>

### TO PUT IT IN A SIMPLE WAY

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A job in a bubble of media agencies and their clients  
(= people from marketing) **makes you younger!**  
(as if it's not enough, living in Prague adds even more  
differences)

**BUT**

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Our target groups often have completely different lifestyles  
and media habits -  
are we able to walk in their shoes and look at their media  
usage as it really is?

# INFLUENCERS

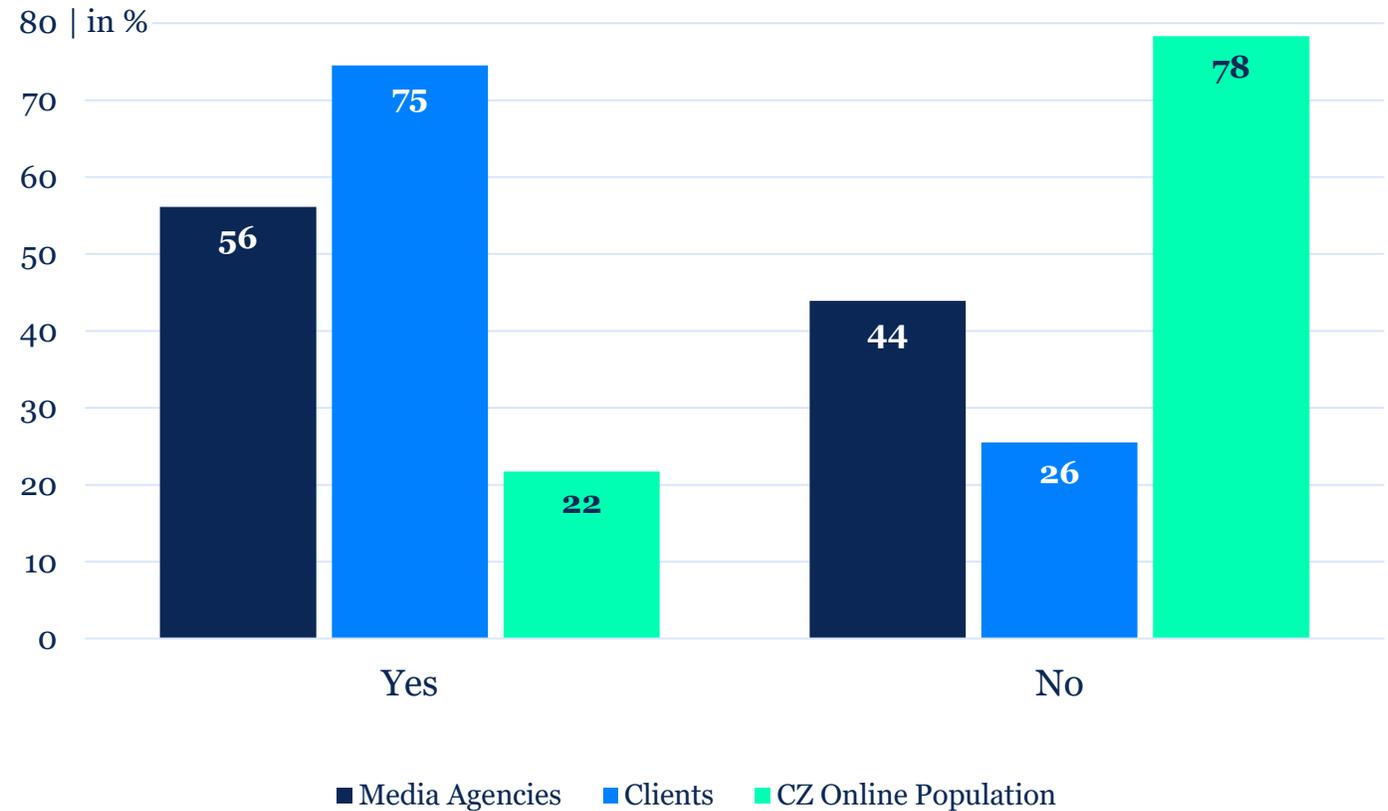
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Who does not use influencers is not a marketer. But even this channel has its limits. Media agency people and clients enjoy it, but how many people from the general population enjoy it?

## FOLLOWING INFLUENCERS

More than half of people in media agencies follow influencers and among their clients it is 3/4 (which is probably natural, who else should watch them than those who pay them the money).

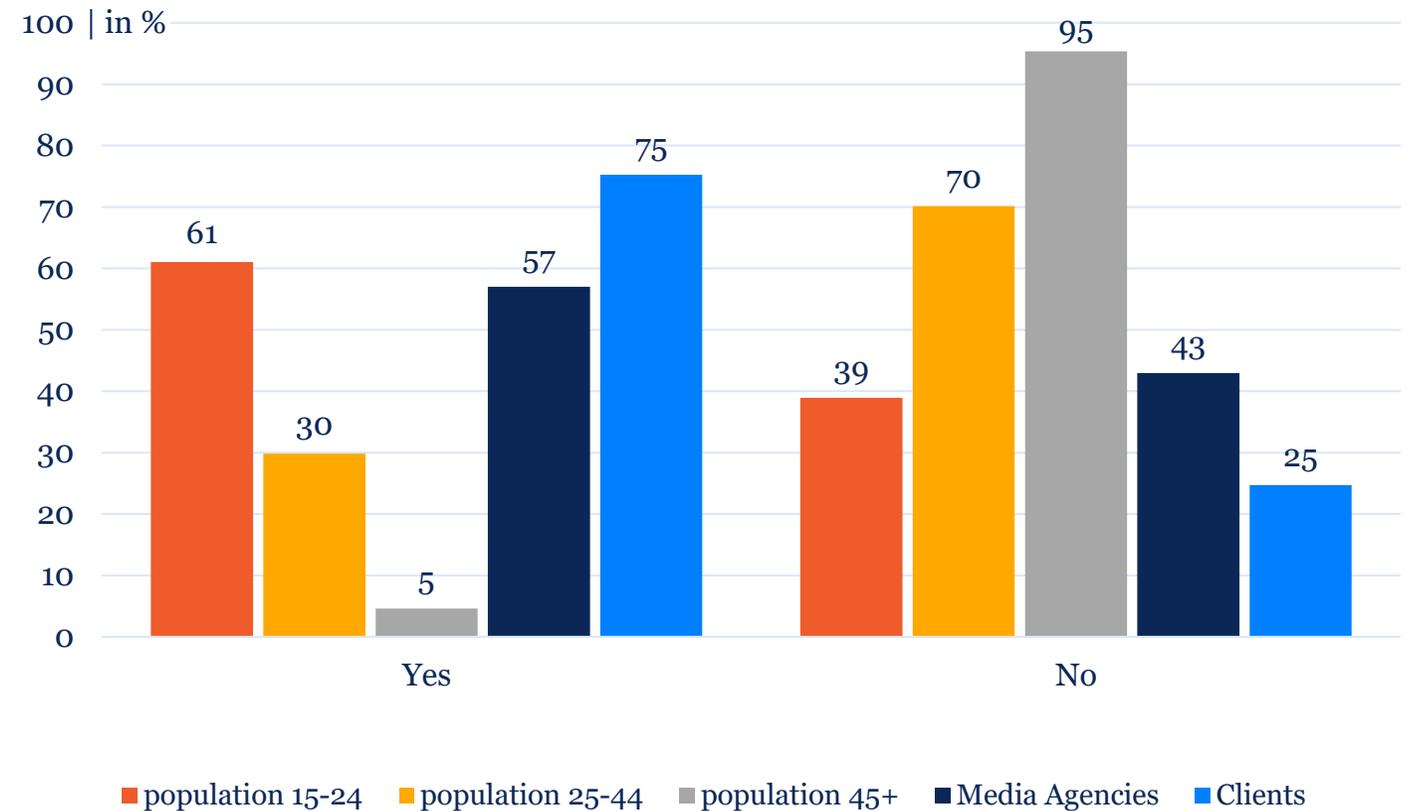
In the general population, however, only a fifth of people follow influencers!



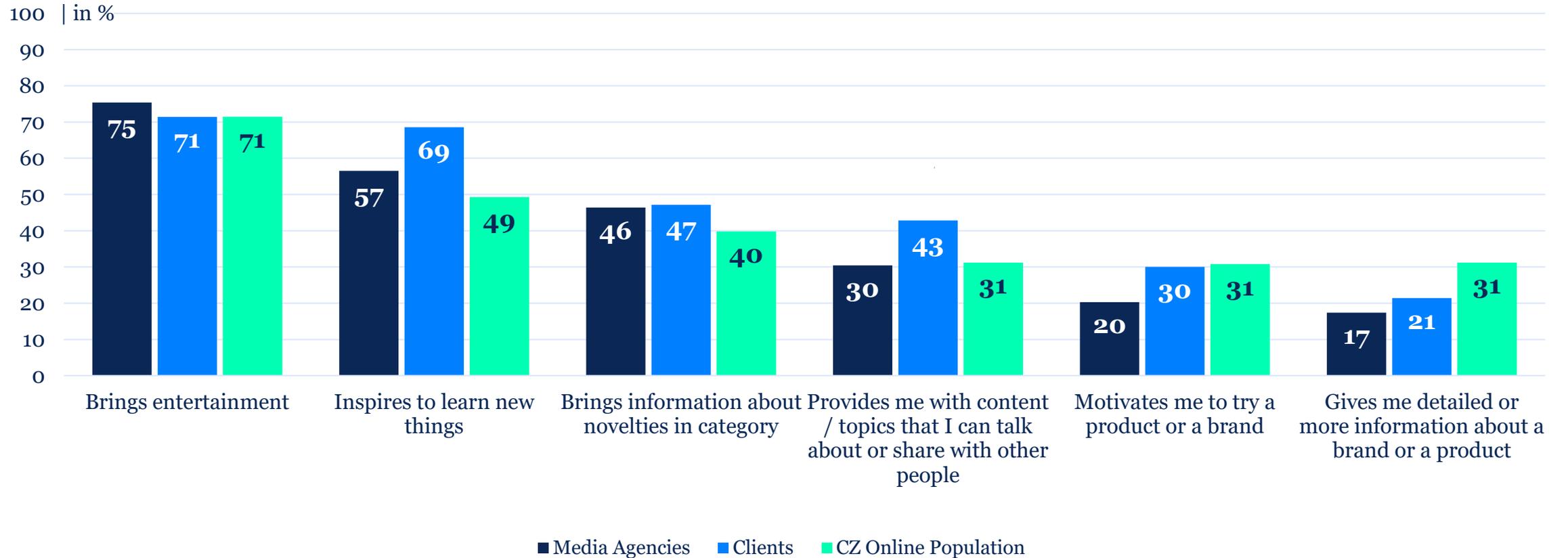
## FOLLOWING INFLUENCERS

Both people from media agencies and those on the clients' side trump even the youngest age subgroup.

Only those of us who are 45+ follow influencers a little less (but still at the level of those in their thirties - a little less among clients).



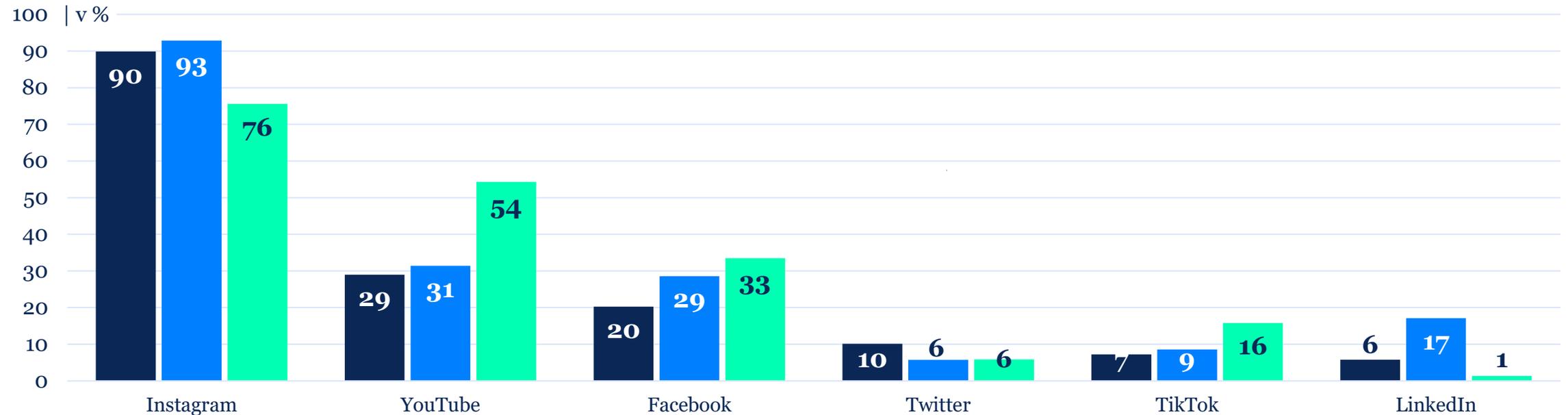
# WHAT ARE WE FOLLOWING INFLUENCERS FOR



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## WHERE WE FOLLOW THEM

While people from media agencies and clients follow influencers mostly on Instagram (which they also use much more), the general population often follows them on YouTube (the younger ones on TikTok).



# WATCHING TV

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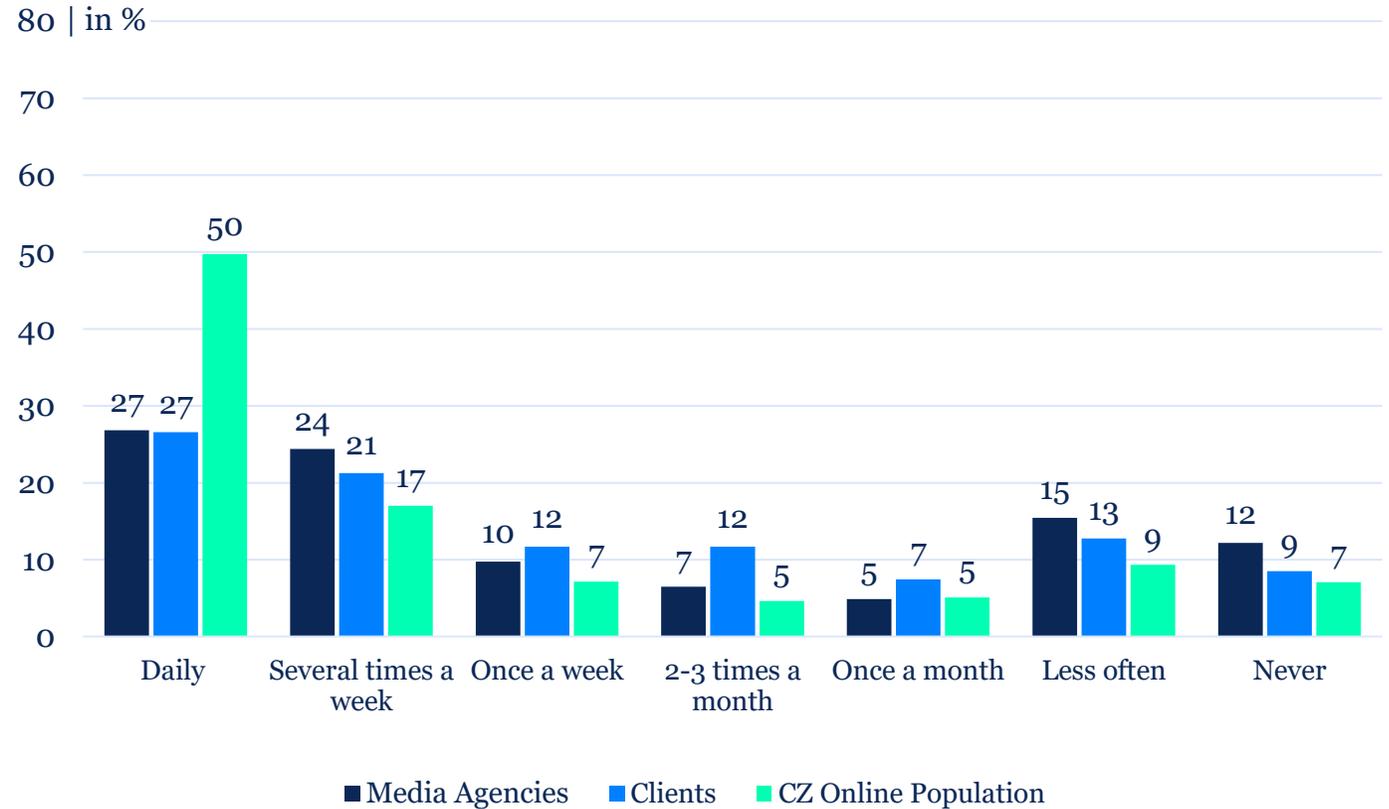
After all, classic TV is soooo old-fashioned and only retirees watch it. Or not? Well, it's not the media agencies employees and their clients who sit in in front of it.

# WATCHING LIVE TV BROADCAST, IN REAL TIME

Half of people watch TV every day and another fifth almost every day. The scores are however much smaller among media agencies' people and their clients: only 27% watch it every day and another less than a quarter several times a week.

On the contrary, 30% of us watch TV only once a month or not at all (compared to 20% in the population).

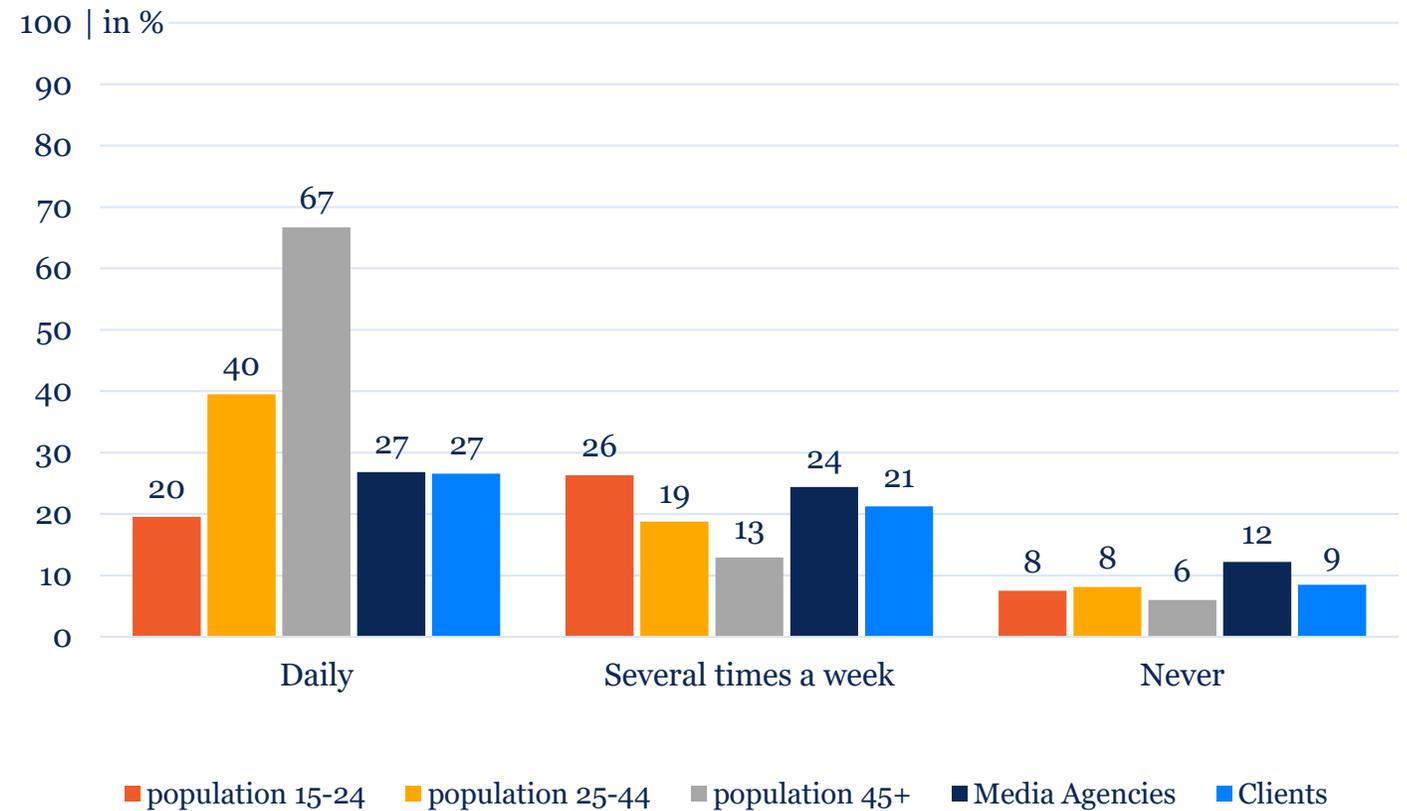
If we succumb to the "instinct" judging others by my own standards, we can easily conclude that TV is really not that important.



# WATCHING TV LIVE, IN REAL TIME

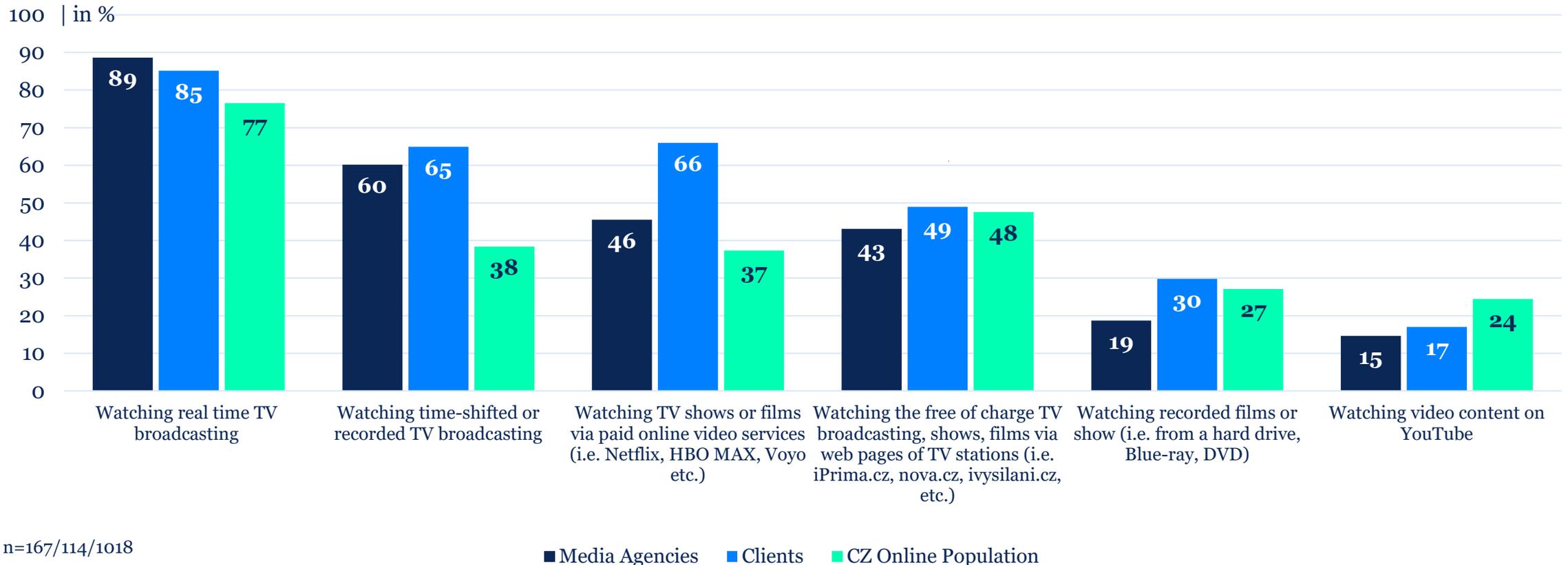
Our TV habits resemble the youngest age group under 24!

Only our colleagues over 45 are more like the population aged 25-45.



# WATCHING TELEVISION - WHAT DOES THE TERM MEAN

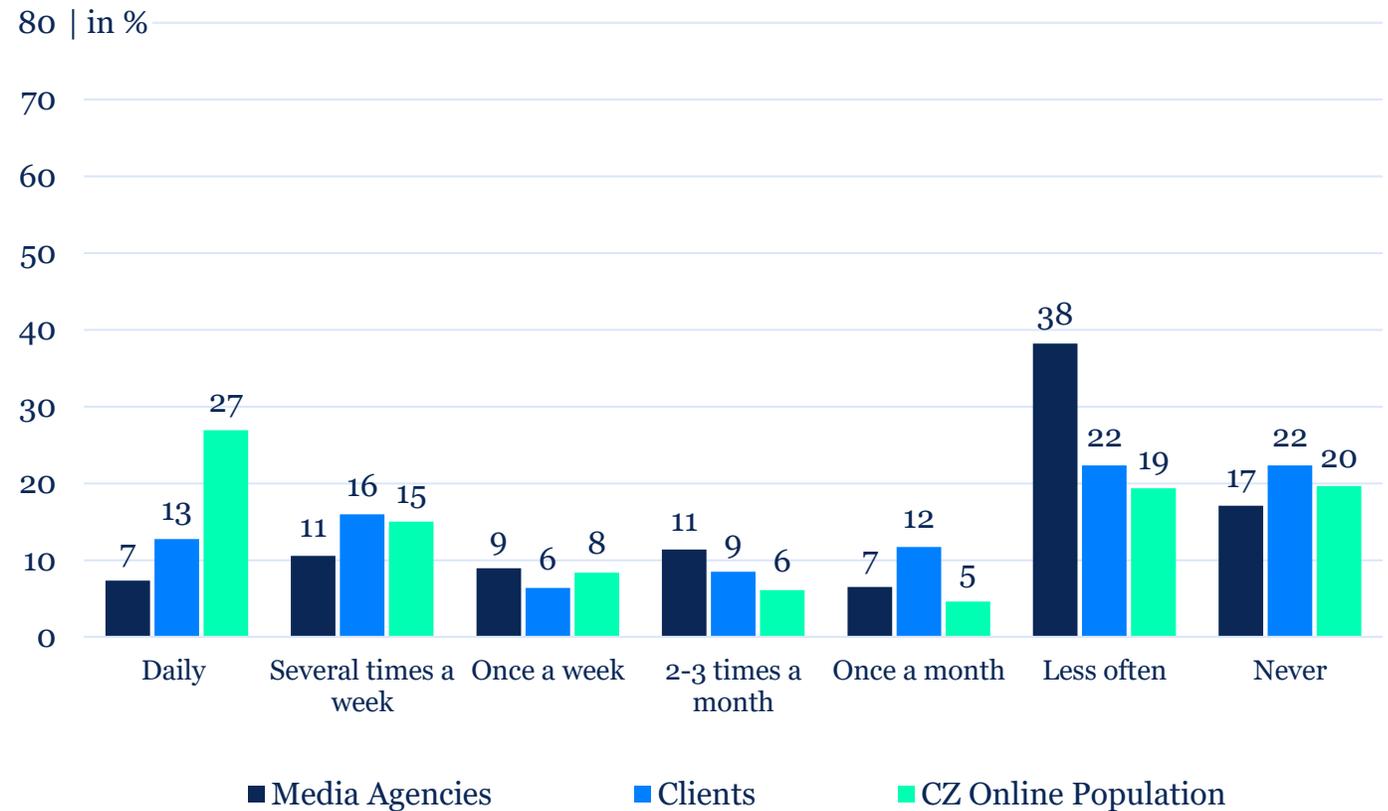
In our surveys, we often ask whether people watch TV. Nonetheless as with other terms where "everyone knows what that means," it is good to ask what it's really like from time to time. Although watching TV is still associated mainly with live broadcasting, for half of the people it means also watching free of charge broadcasting on the Internet, and for people from media agencies and clients it is often about recorded broadcasting (not so much for the general population).



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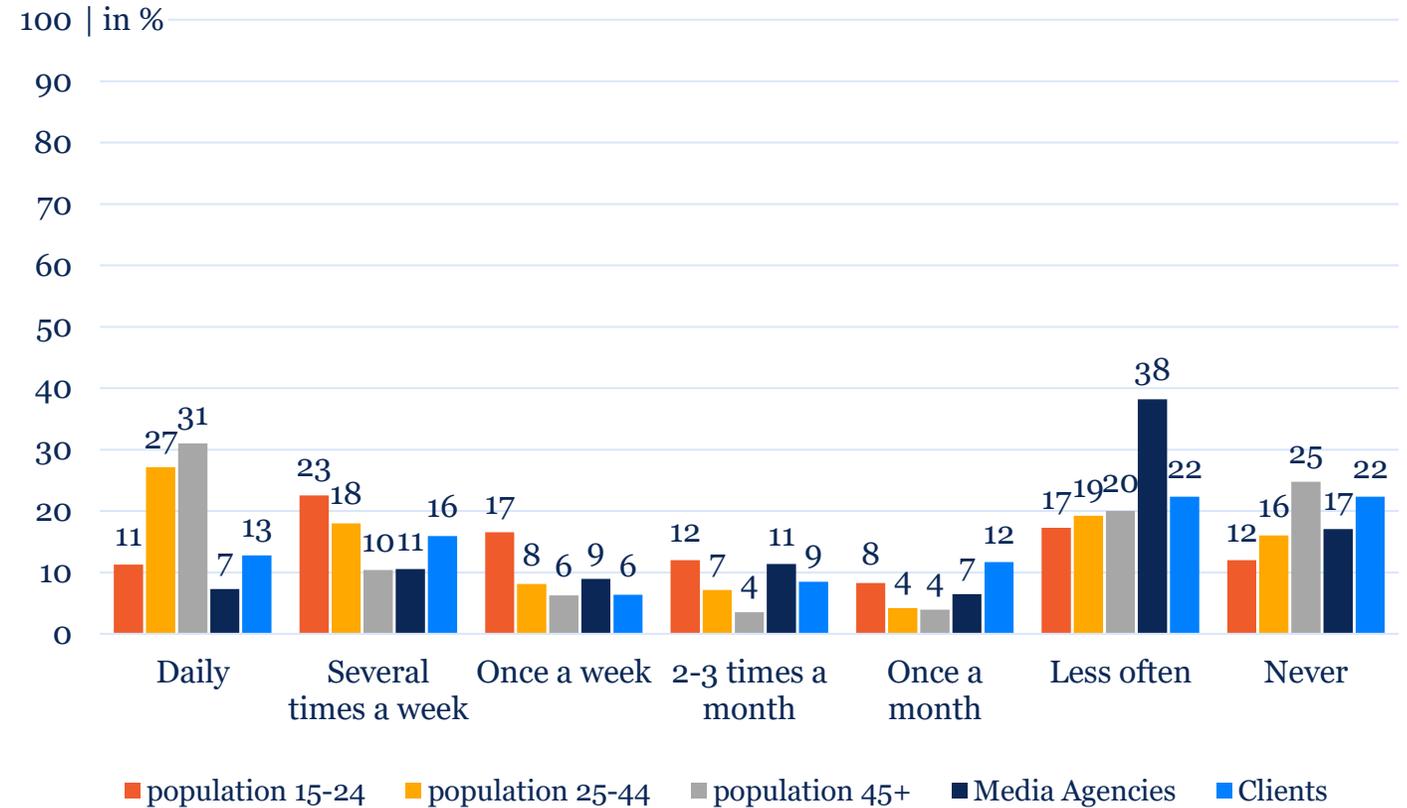
## WATCHING FREE OF CHARGE TV BROADCASTS, TV PROGRAMS, MOVIES VIA THE WEBSITES OF TV STATIONS

As with traditional TV broadcasting, neither the free of charge TV broadcasting over the Internet (iPrima, CT24, ČT iVysílání) is very popular among media agencies' people and their clients.



# WATCHING FREE OF CHARGE TV BROADCASTS, TV PROGRAMS, MOVIES VIA THE WEBSITES OF TV STATIONS

And just like with classic TV broadcasting, our habits are similar to the youngest age group under 24 y.o..



# VOD

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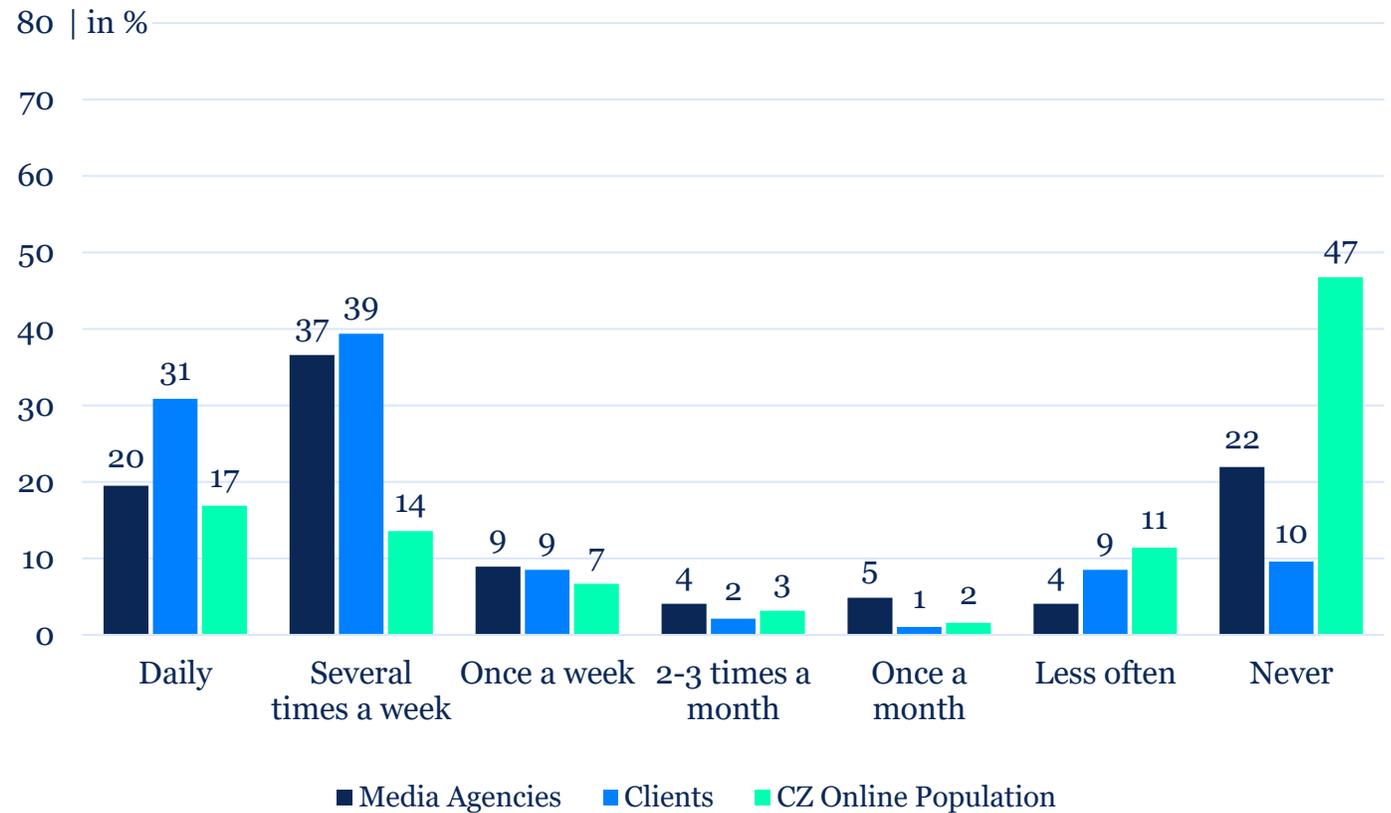
Have you seen Squid Game (for the fans 오징어 게임)?  
No? Don't you have Netflix? Then you are probably not  
from a media agency or our client.  
But what about general population?

# WATCHING TV SHOWS OR FILMS VIA PAID ONLINE VIDEO SERVICES (NETFLIX, HBO, ETC.)

With their intensity Netflix, HBO and similar services watching, both media agencies' people and clients differ fundamentally from the general population.

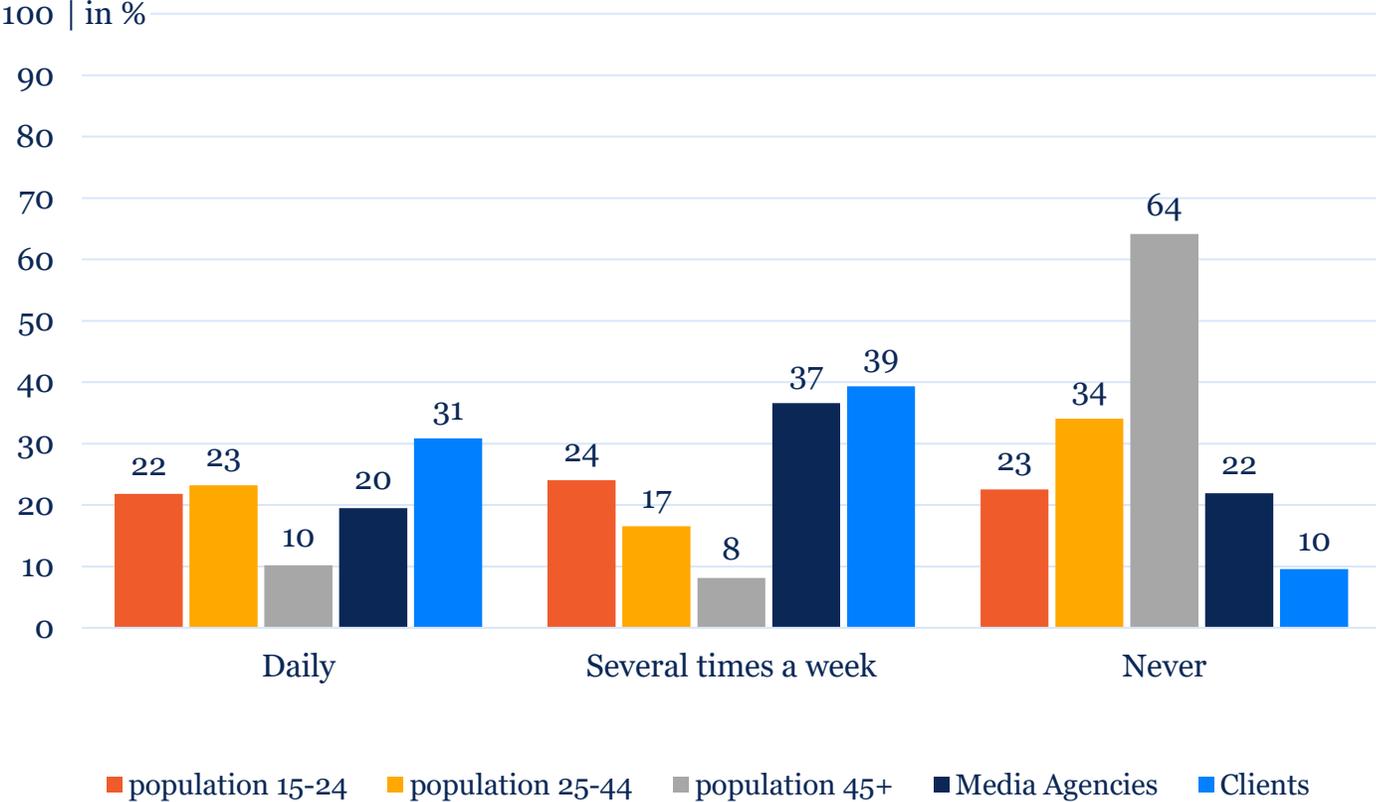
This is also the explanation why they watch less TV (there is simply no time for it).

67% of people in media agencies and 70% of their clients watch VOD services several times a week - compared to just 30% of the general population.



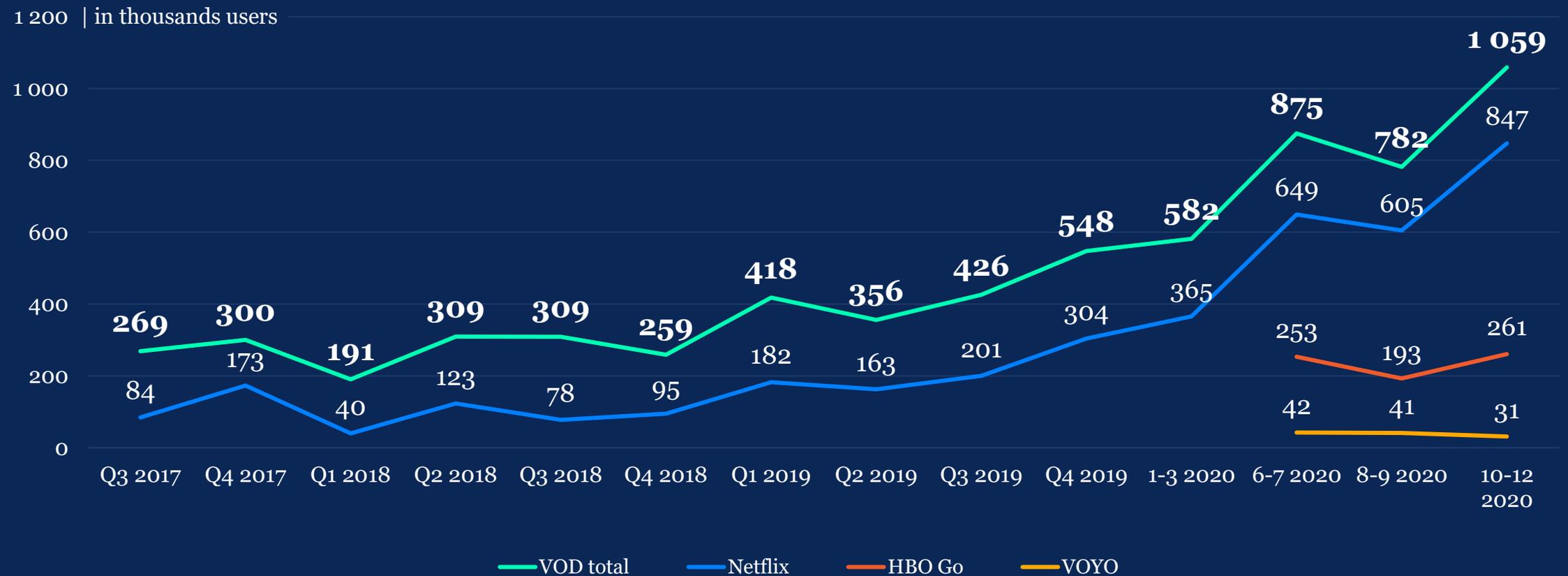
# WATCHING TV SHOWS OR FILMS VIA PAID ONLINE VIDEO SERVICES (NETFLIX, HBO, ETC.)

Netflix and HBO are on in our homes almost daily. Not even the youngest part of our population is able to keep the pace with us. Still, within the general population, as seen from the population age subgroups detail, these are mainly young people under 24 who are running away from the media types, where we can reach them with advertising, to paid online video services.



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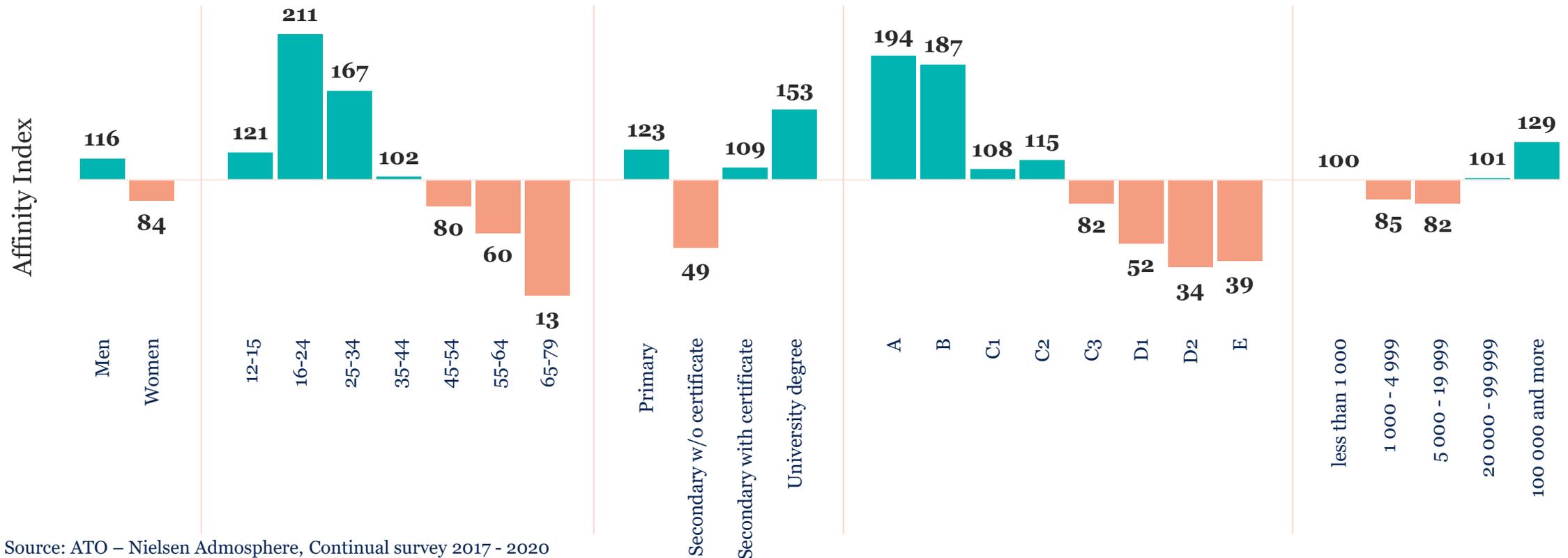
# NUMBER OF VOD USERS



Source: ATO – Nielsen Admosphere, Continual Survey 2017 - 2020

# WHO ARE THE PEOPLE USING VODs

The profile of VOD services' audience can be clearly seen from these affinity indices chart. People's declarations about their follow-up (see previous slides) are once again quite accurate: these are rather younger Czechs (mostly under 34), educated, with higher socioeconomic status and more often also from large cities. And these people we have to "catch elsewhere".



Source: ATO – Nielsen Admosphere, Continual survey 2017 - 2020

# ONLINE (NOT ONLY VIDEO)

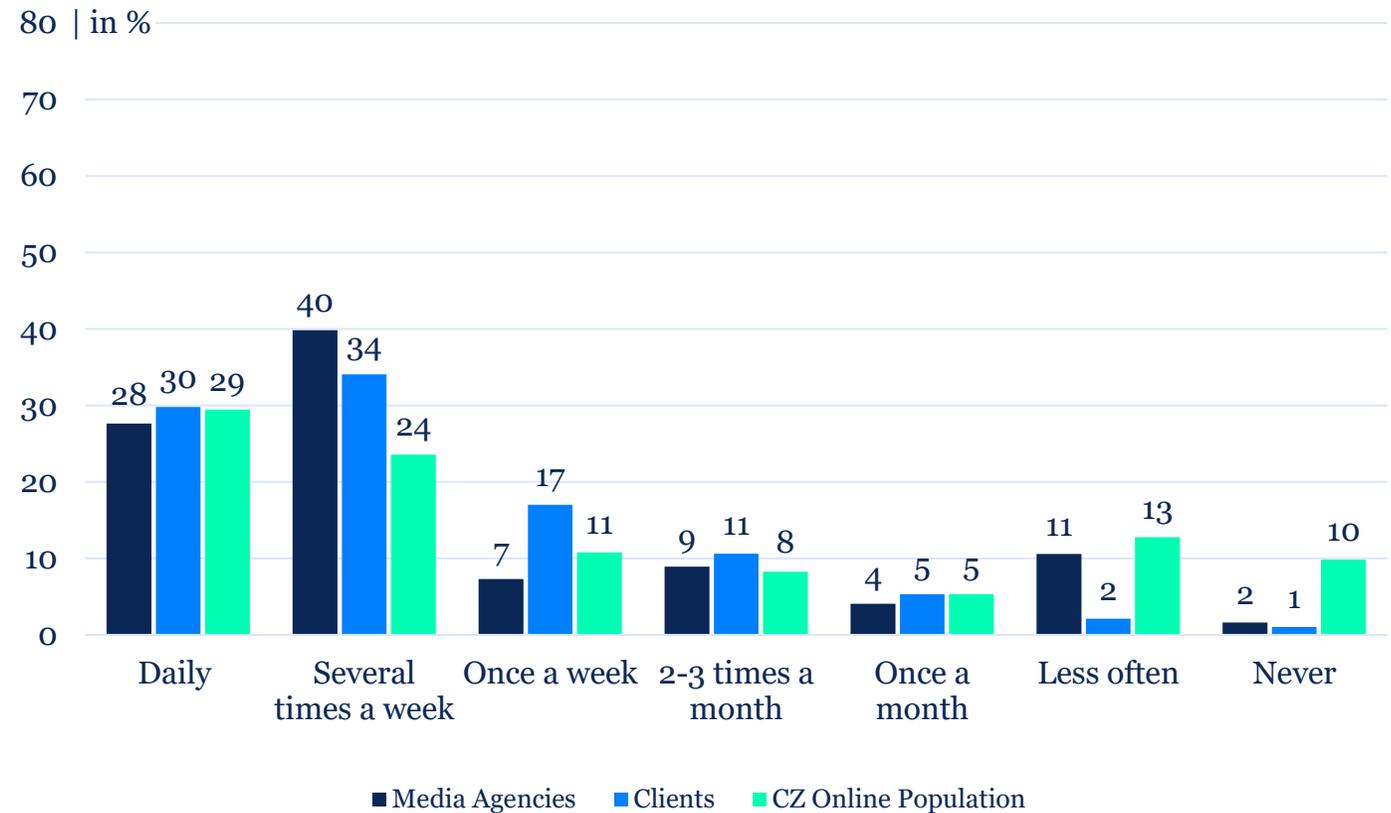
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Which online channels like media agencies' people and which the general population?

## WATCHING VIDEO CONTENT ON THE INTERNET (I. E. YOUTUBE, ETC.)

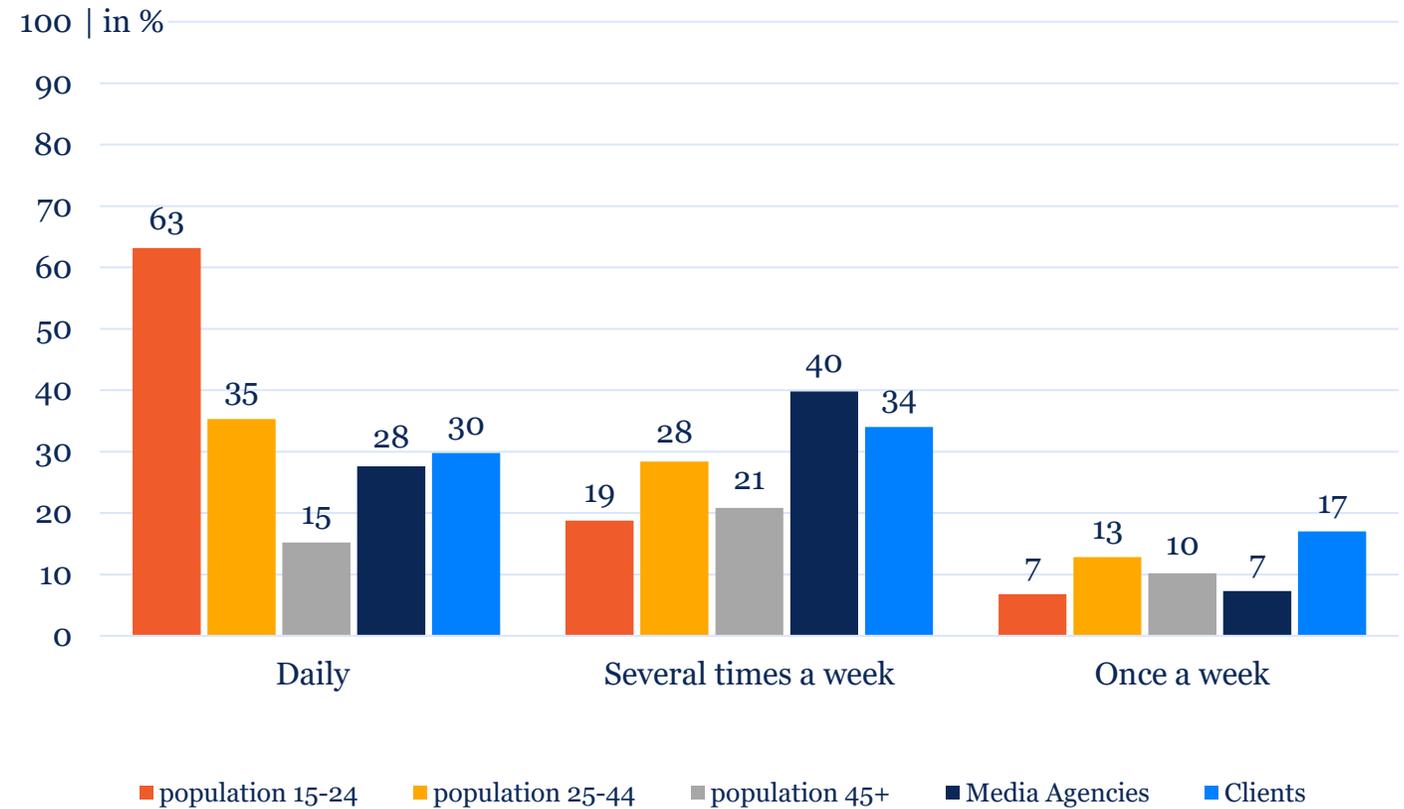
People from media agencies and clients generally watch online videos more intensively than the general population (especially at a frequency of several times a week and more often).

However, the difference is not as big as, for example, in case of watching TV or even VOD.



## WATCHING VIDEO CONTENT ON THE INTERNET (I. E. YOUTUBE, ETC.)

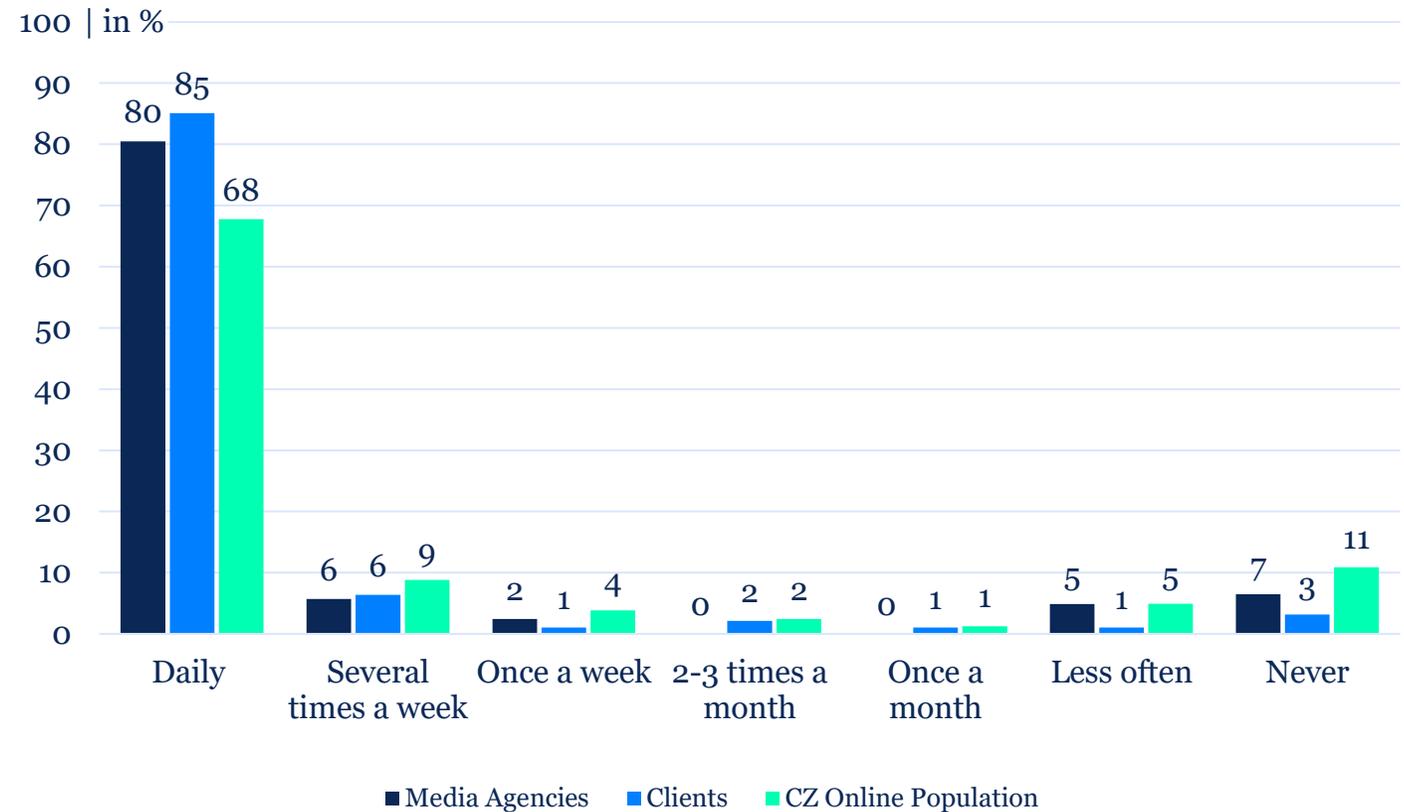
When watching online videos, we are just as young as we really are (25-44 years). The youngest population group is far ahead us in this case.



## USING SOCIAL NETWORKS

Purely in terms of daily reach, we use social networks in the same way as the general population.

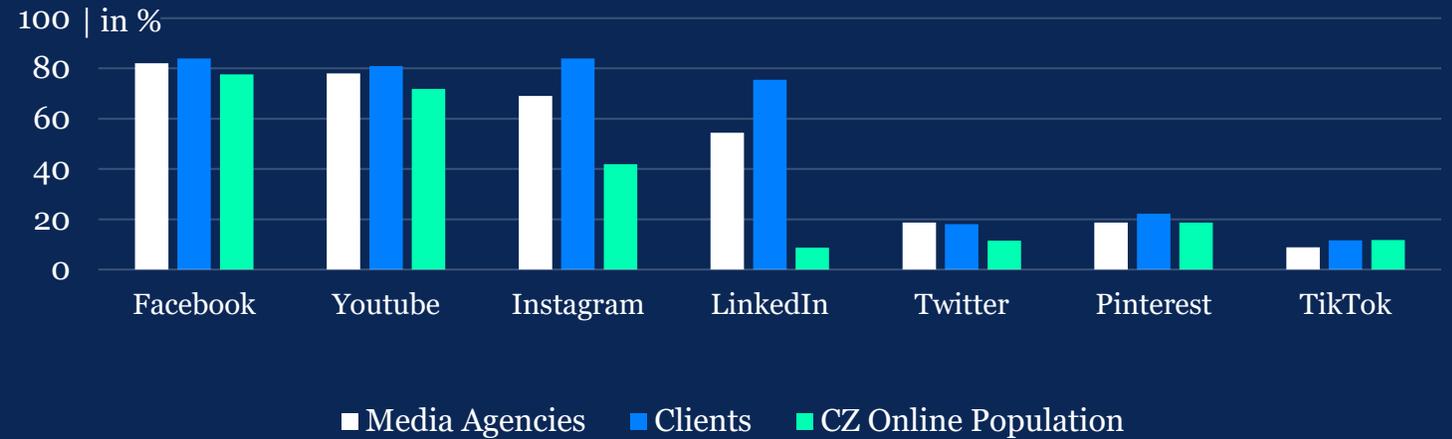
There are nonetheless differences between individual social networks - see on following slides.



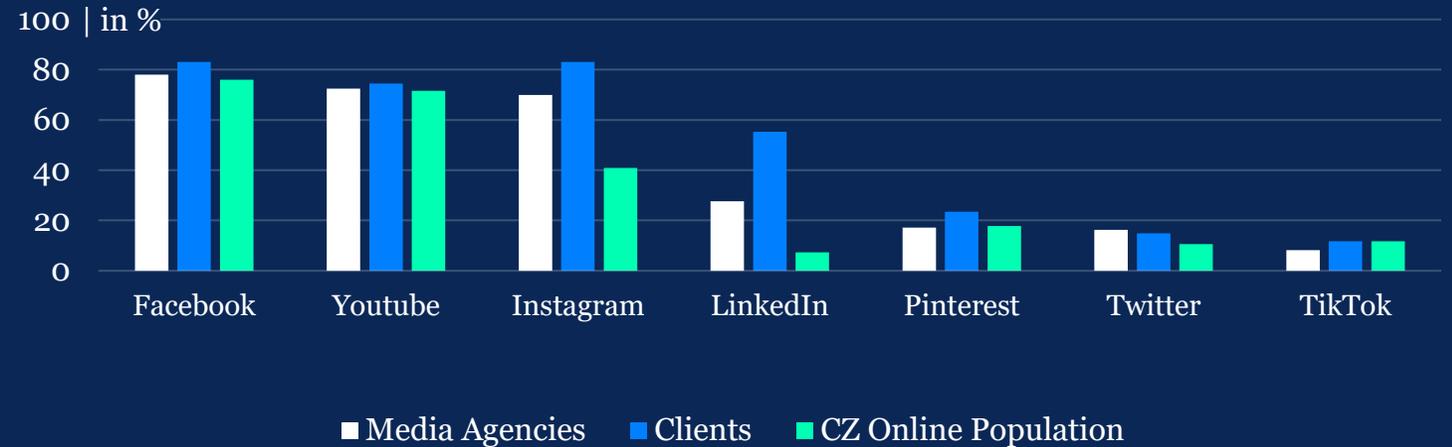
# SOCIAL NETWORK USAGE (DAILY USAGE)

People in media agencies and their clients follow Facebook and YouTube a little more than online population, however, main differences are in following Instagram and LinkedIn.

## Working day



## Weekend

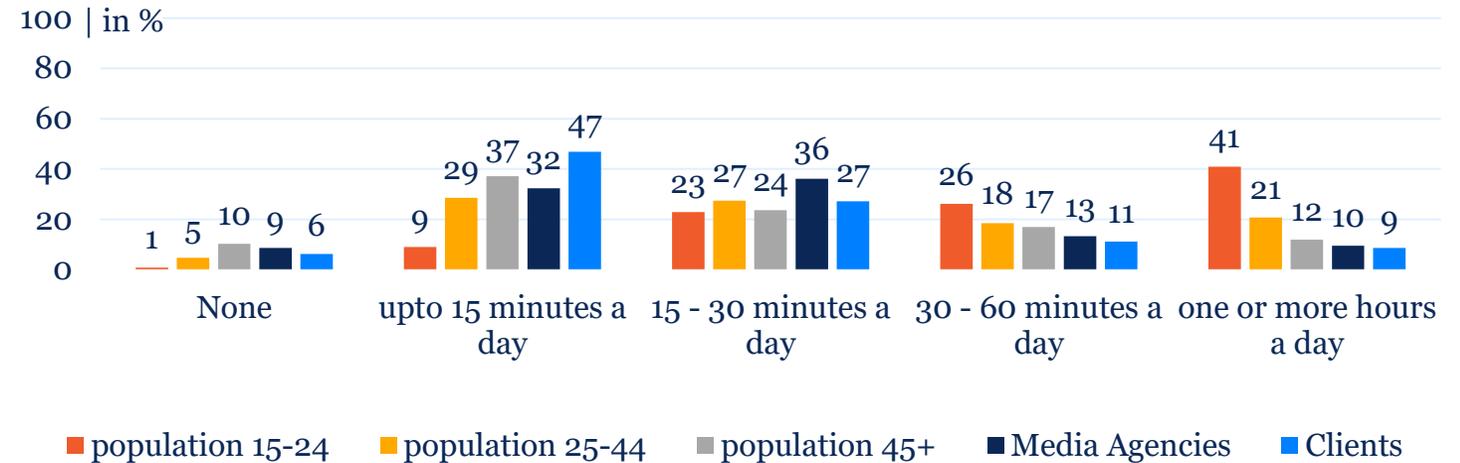


# TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: YouTube

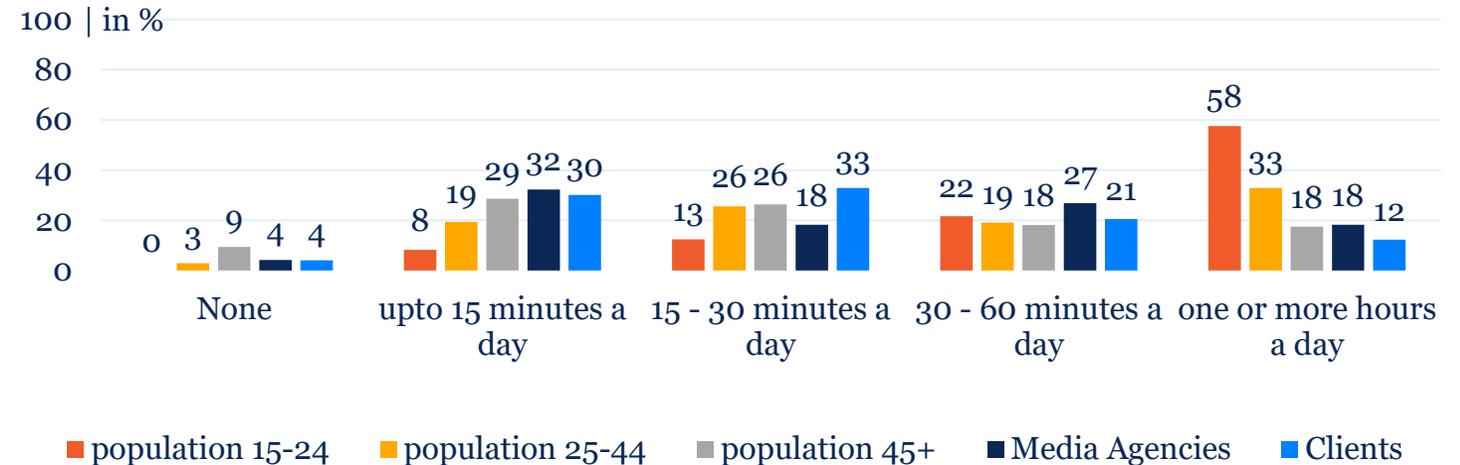
Watching YouTube does not make people younger anymore, therefore we are not that interested in it. Although we check it as often the general population (see previous page), the time we spend there is similar to the older part of the population.

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## Working day



## Weekend

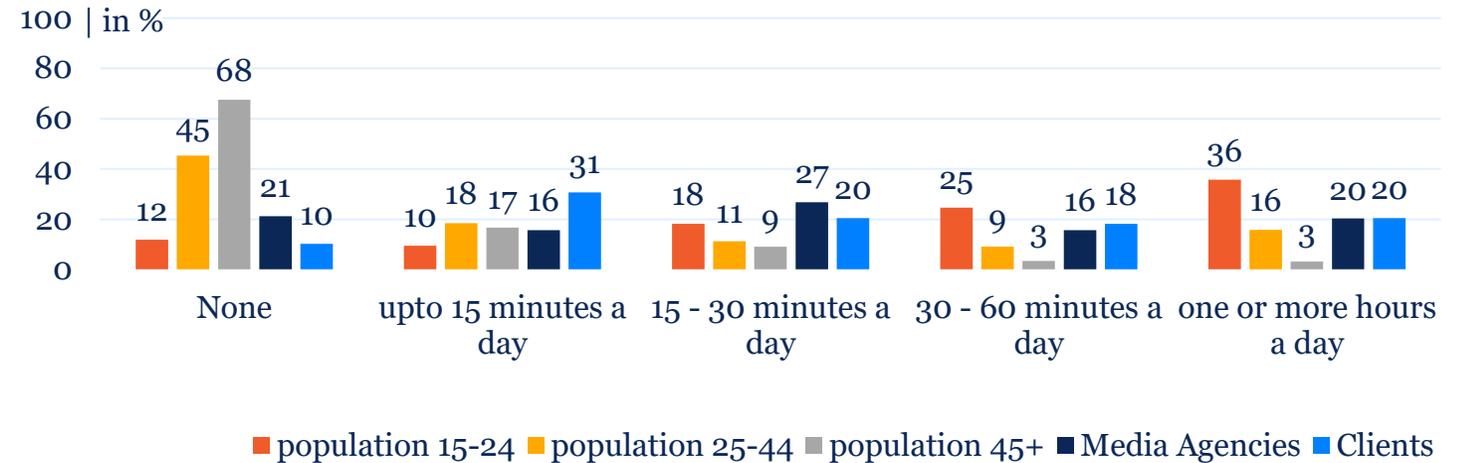


# TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: Instagram

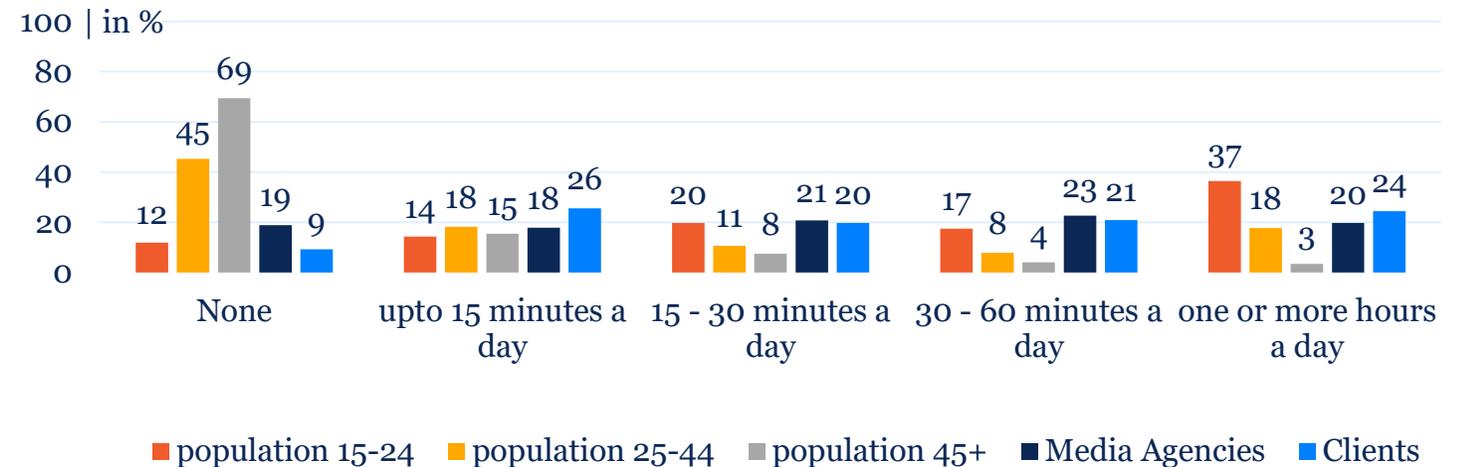
Instagram belongs to us. In terms of time spent on Instagram we are very close to the youngest population, up to 24 y.o.

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## Working day



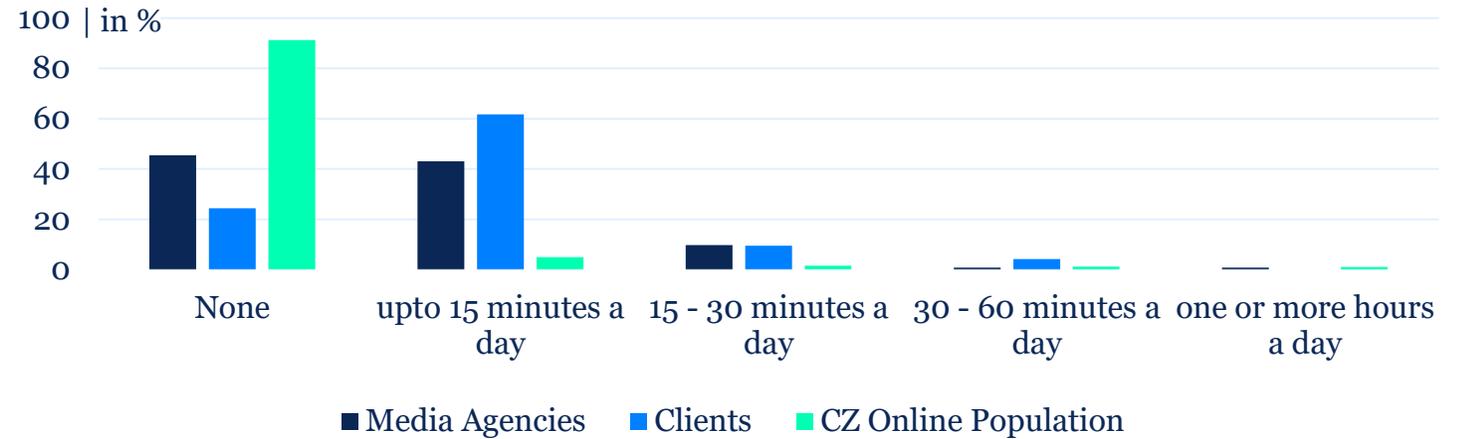
## Weekend



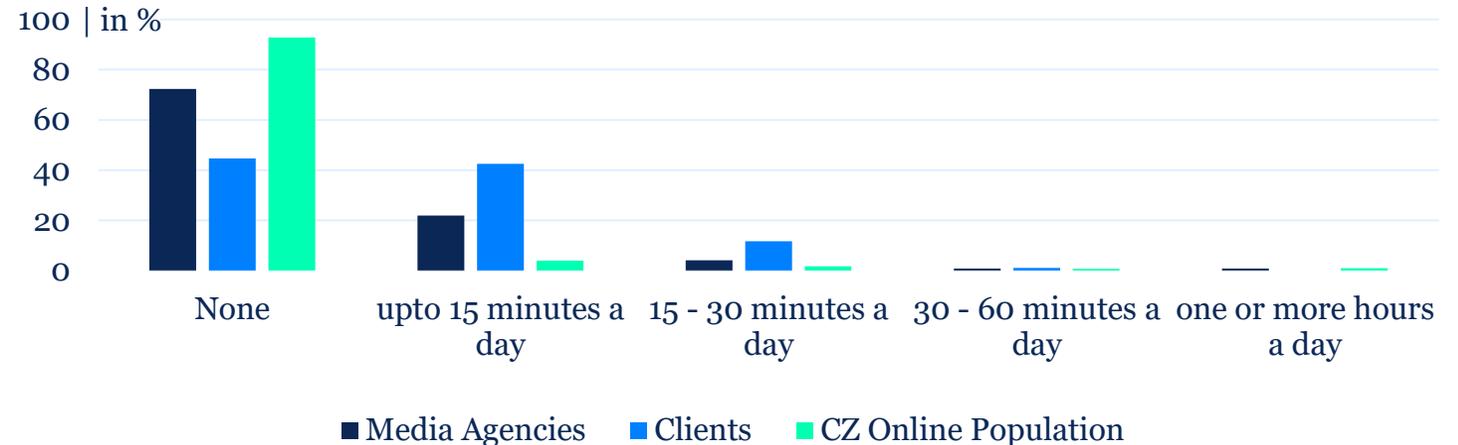
# TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: LinkedIn

To show up on LinkedIn during a working day is almost the good manner in the field of media and marketing (more among clients).

## Working day

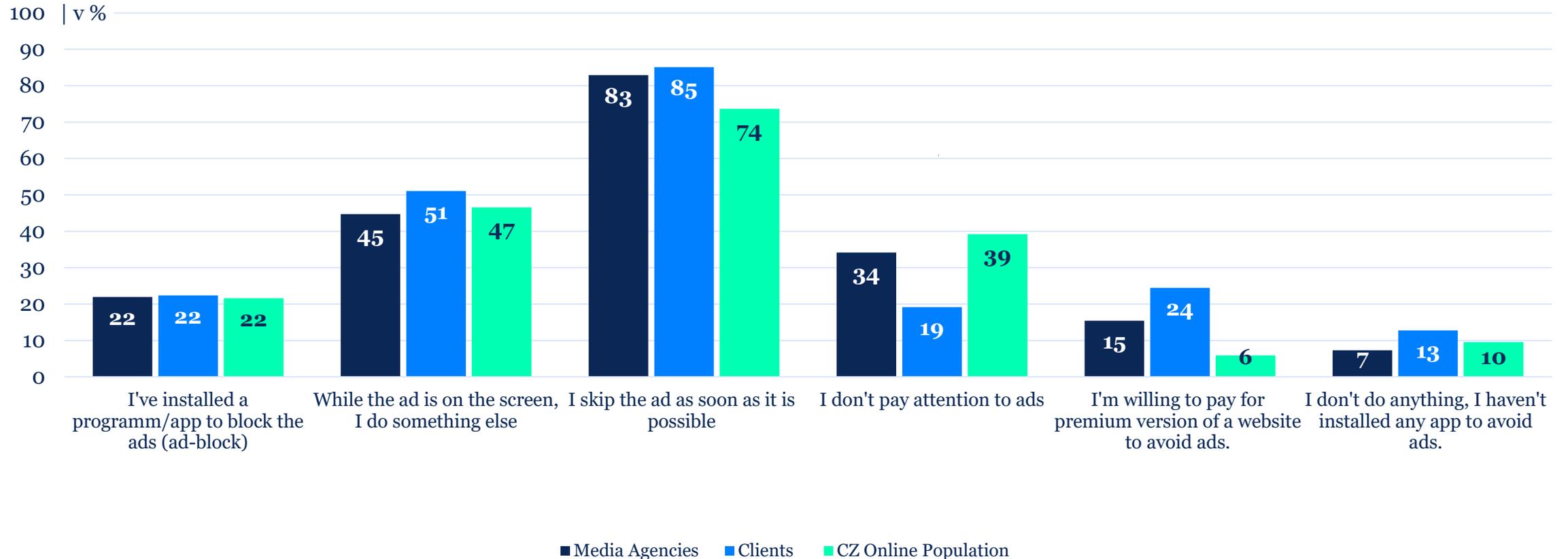


## Weekend



# MEASURES TAKEN TO AVOID ONLINE ADVERTISING

To avoid online advertising, we usually take similar measures as the general population - but people in media agencies and clients are more often willing to pay extra for the premium version without ads.



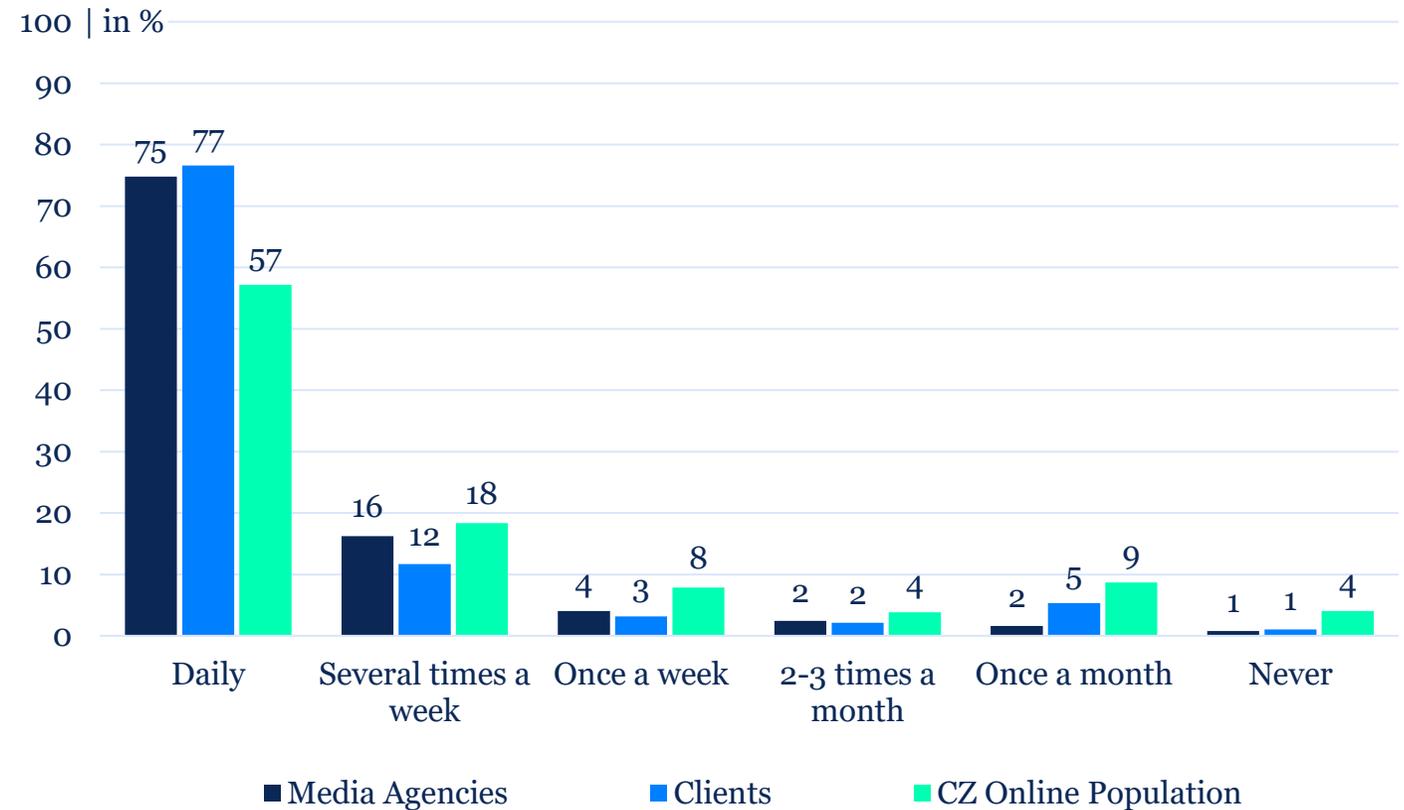
# ONLINE ACTIVITIES, WHERE DO WE DIFFER

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Watching news,  
Listening to the music, podcasts and audiobooks  
Online shopping

## WATCHING THE NEWS AND FOLLOWING THE CURRENT AFFAIRS ON THE INTERNET

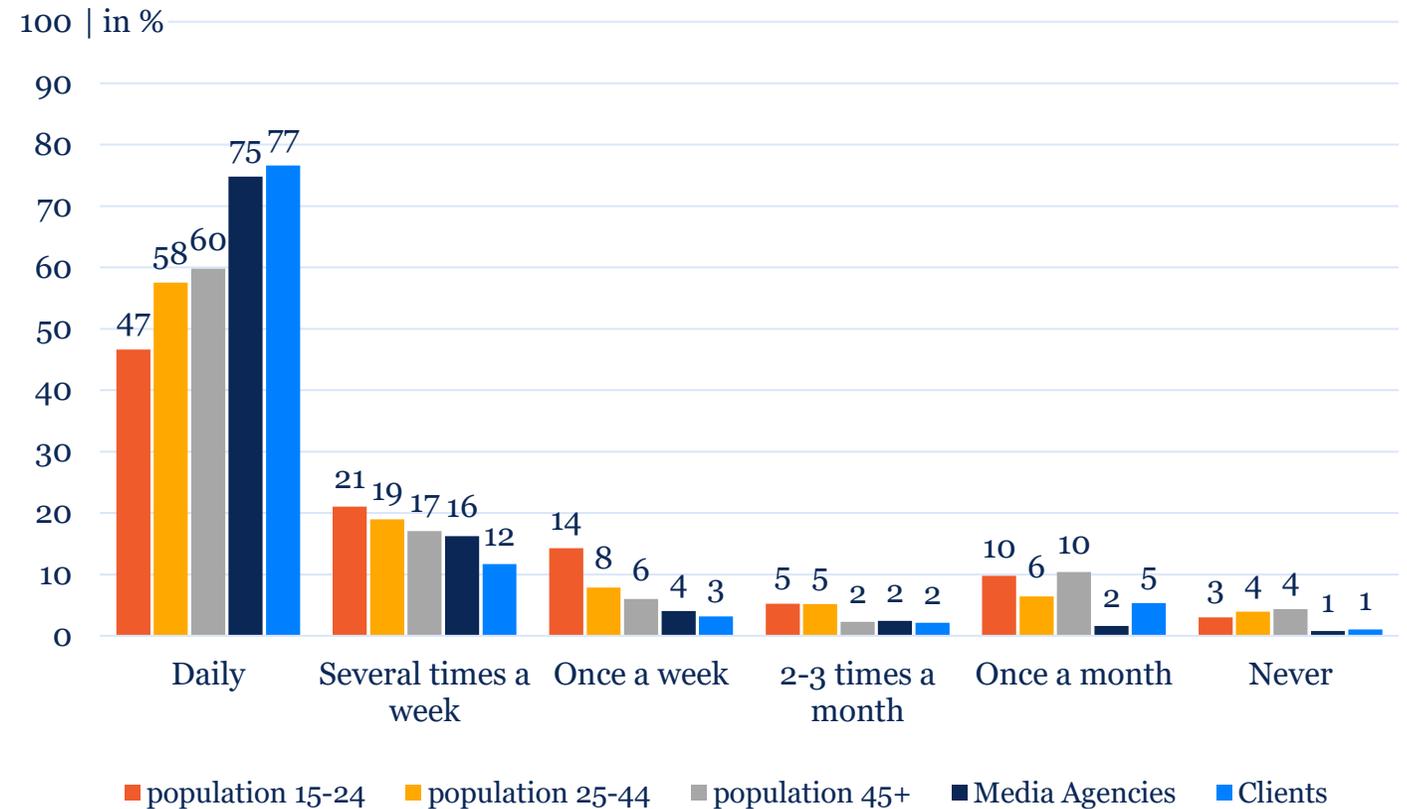
People from media agencies as well as their clients watch the news mostly daily (3/4 of them) which is by 20 pp more than in general population.



# WATCHING THE NEWS AND FOLLOWING THE CURRENT AFFAIRS ON THE INTERNET

As for the news watching, people in media agencies and their clients are basically old peasants - no age group of the general population can match us (even the older ones, who watch the news more often in general).

You might say that it's the effect of college education. Yes, but we follow the news even more than the university educated non-media population (MA 75%, or C 77% vs. 67% among college educated general population).

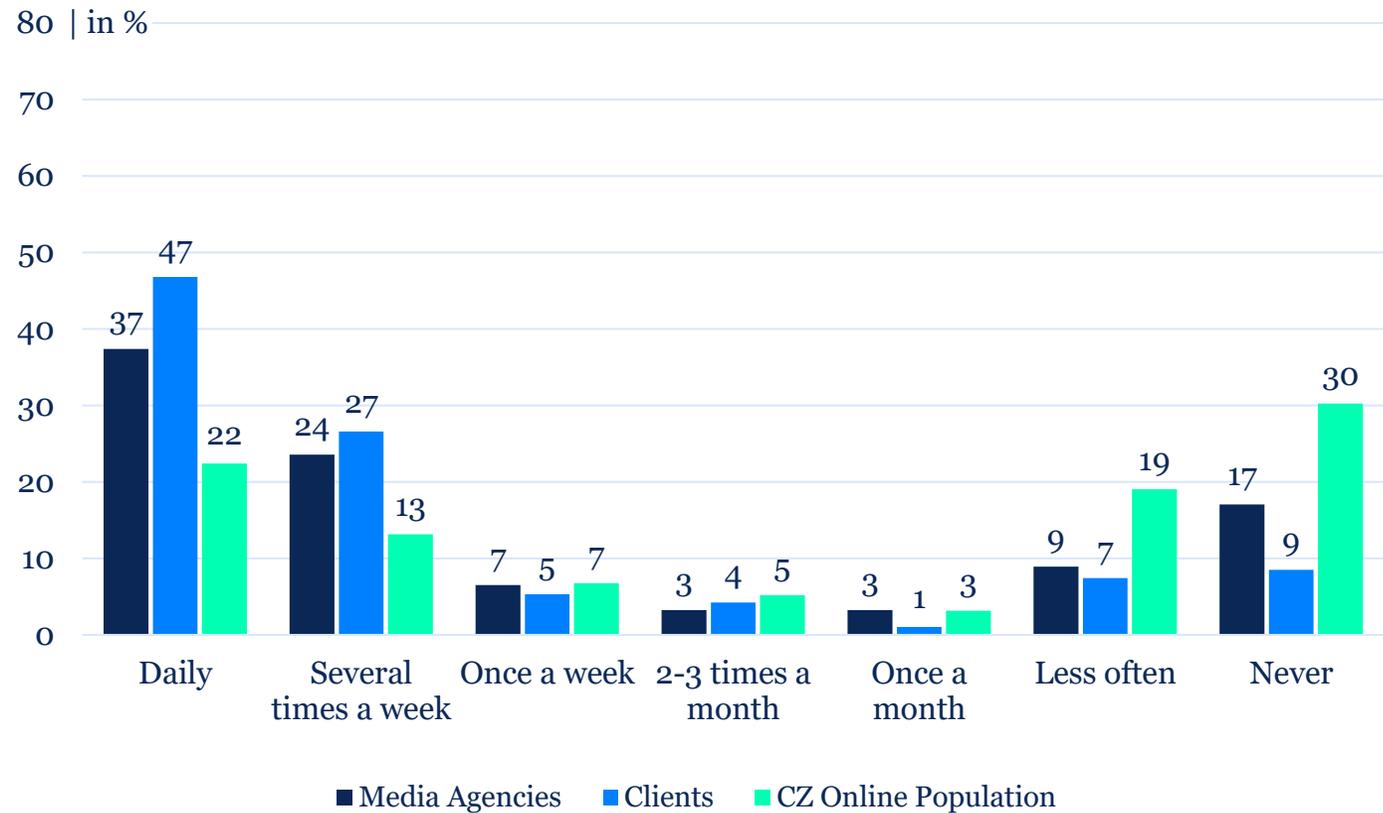


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# LISTENING TO THE MUSIC ON THE INTERNET OR IN MUSIC APPS (I.E. APPLE MUSIC, SPOTIFY)

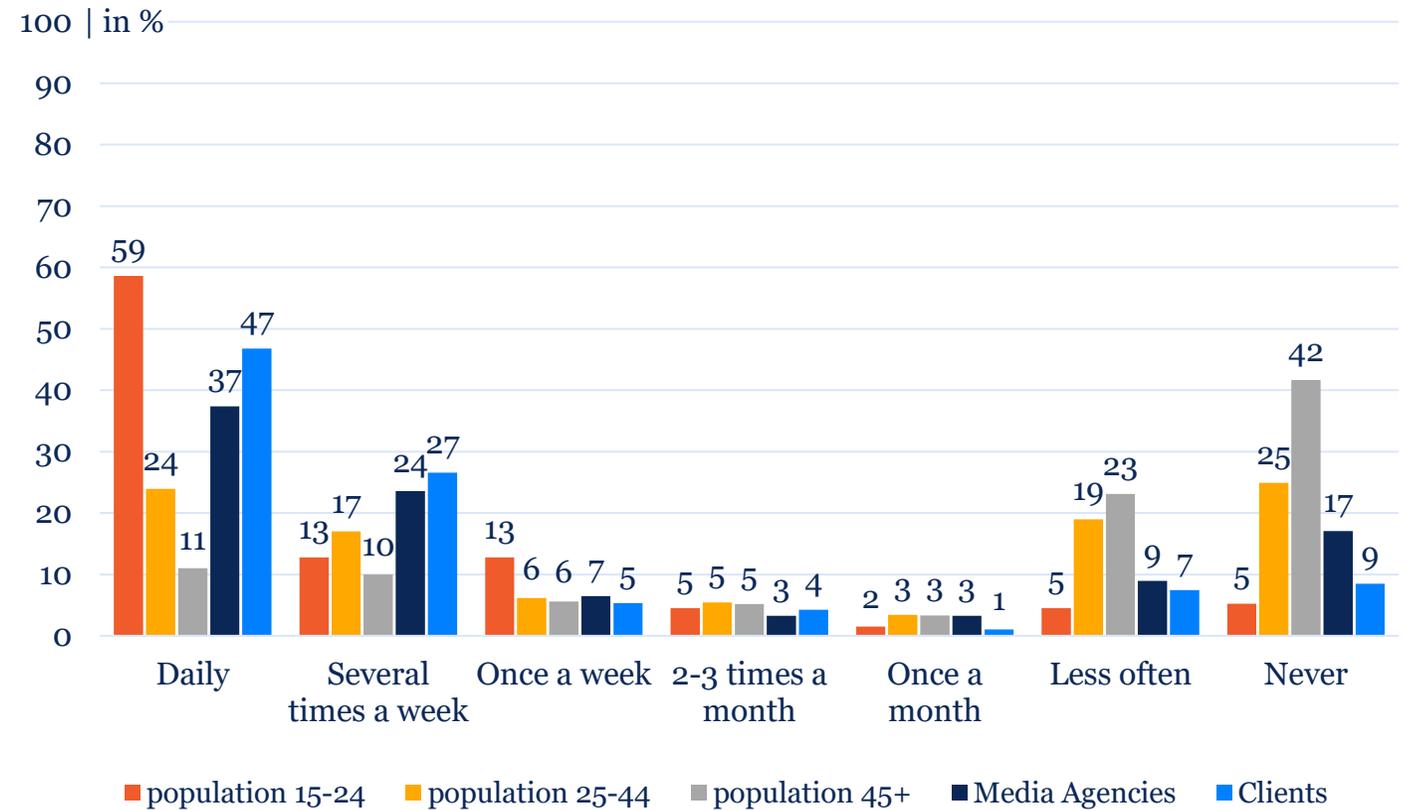
Listening to music over the Internet or through applications is another area where the general population is far behind the people from media agencies and their clients.

61% of people in media agencies and 74% of clients listen to music this way at least several times a week (maybe the effect of working in calm, quiet open-space offices ....?).



# LISTENING TO THE MUSIC ON THE INTERNET OR IN MUSIC APPS (I.E. APPLE MUSIC, SPOTIFY)

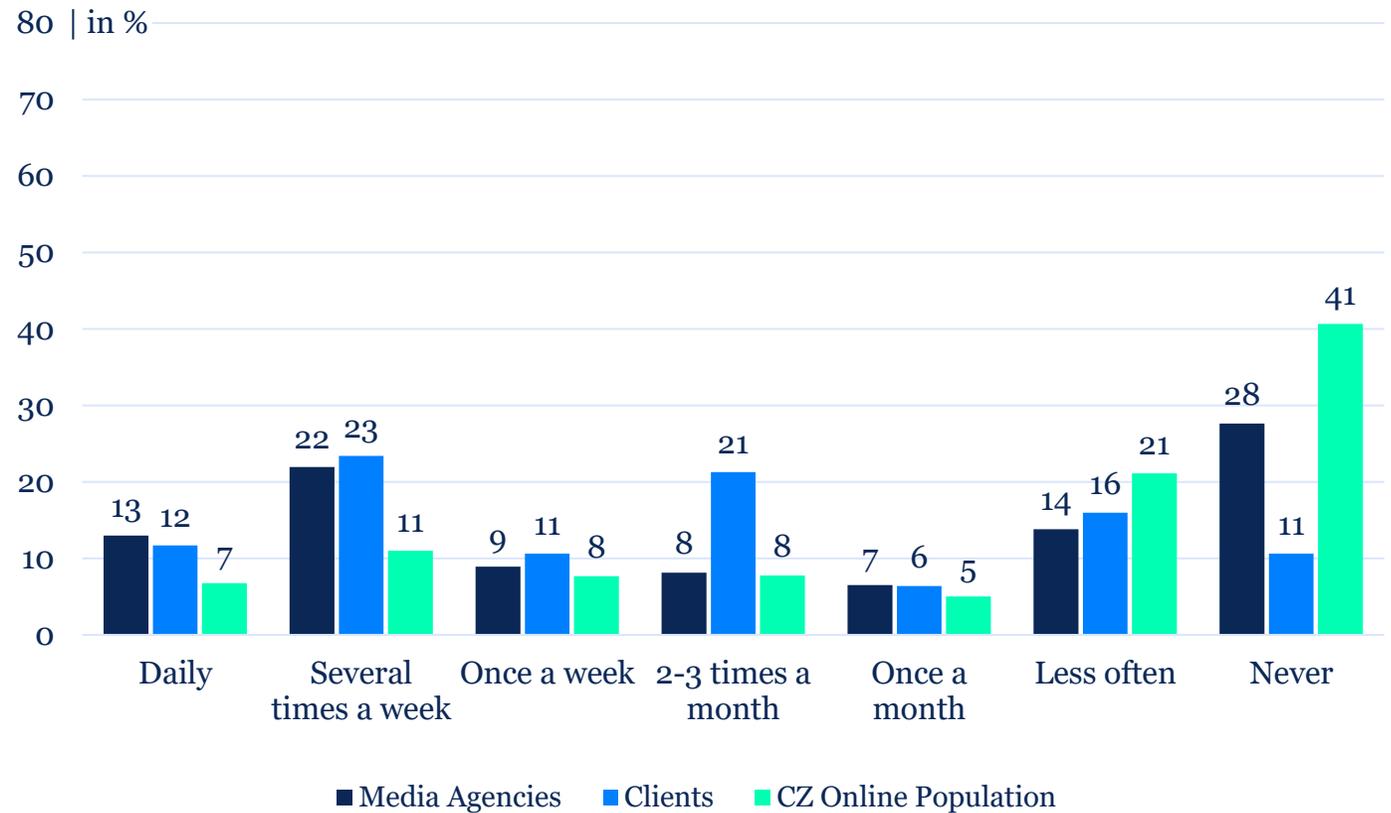
Only the youngest part of the general population can match the marketers in listening to music via the Internet or through applications.



# LISTENING OR FOLLOWING THE PODCASTS

Both people from media agencies and their clients listen to podcasts significantly more than the general population.

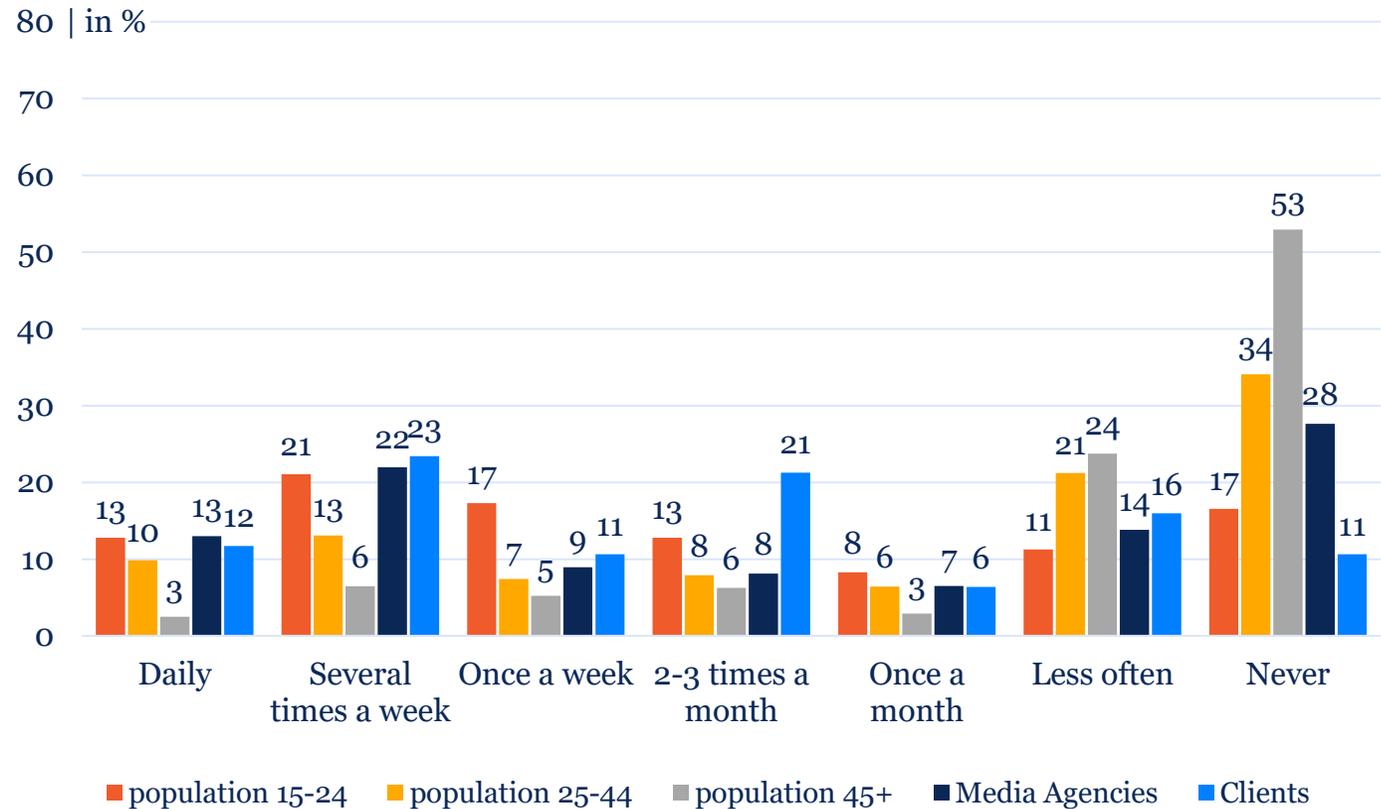
A third listens to them at least several times a week, while in the general population it is less than a fifth and 41% of common folk do not listen to podcasts at all.



# LISTENING OR FOLLOWING THE PODCASTS

As in many other cases, also in case of listening to podcasts, there are big differences among the age subgroups of the general population - the youngest are again the most frequent users.

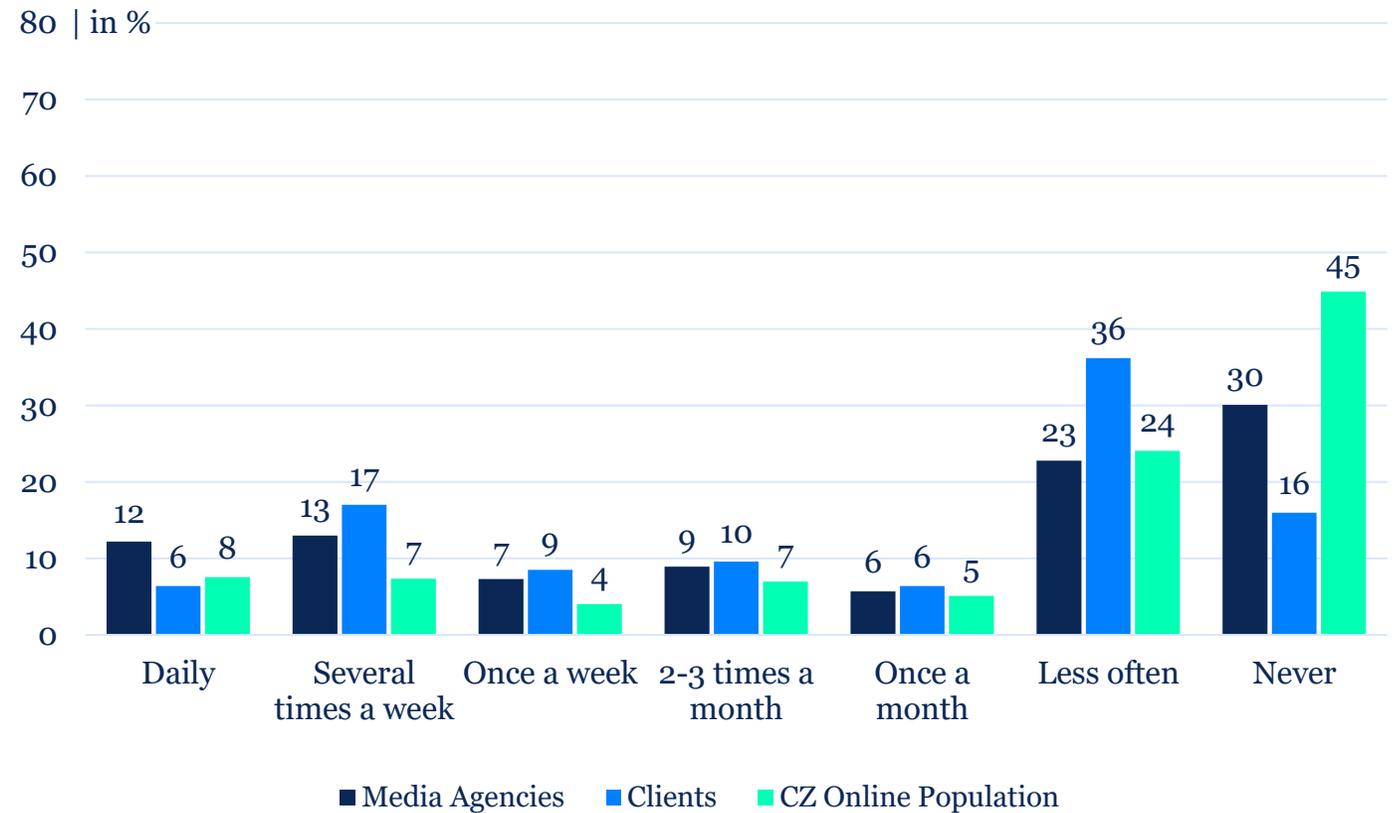
Media professionals, together with clients, are somewhere between the youngest and the middle age group in terms of the intensity of their podcasts' usage.



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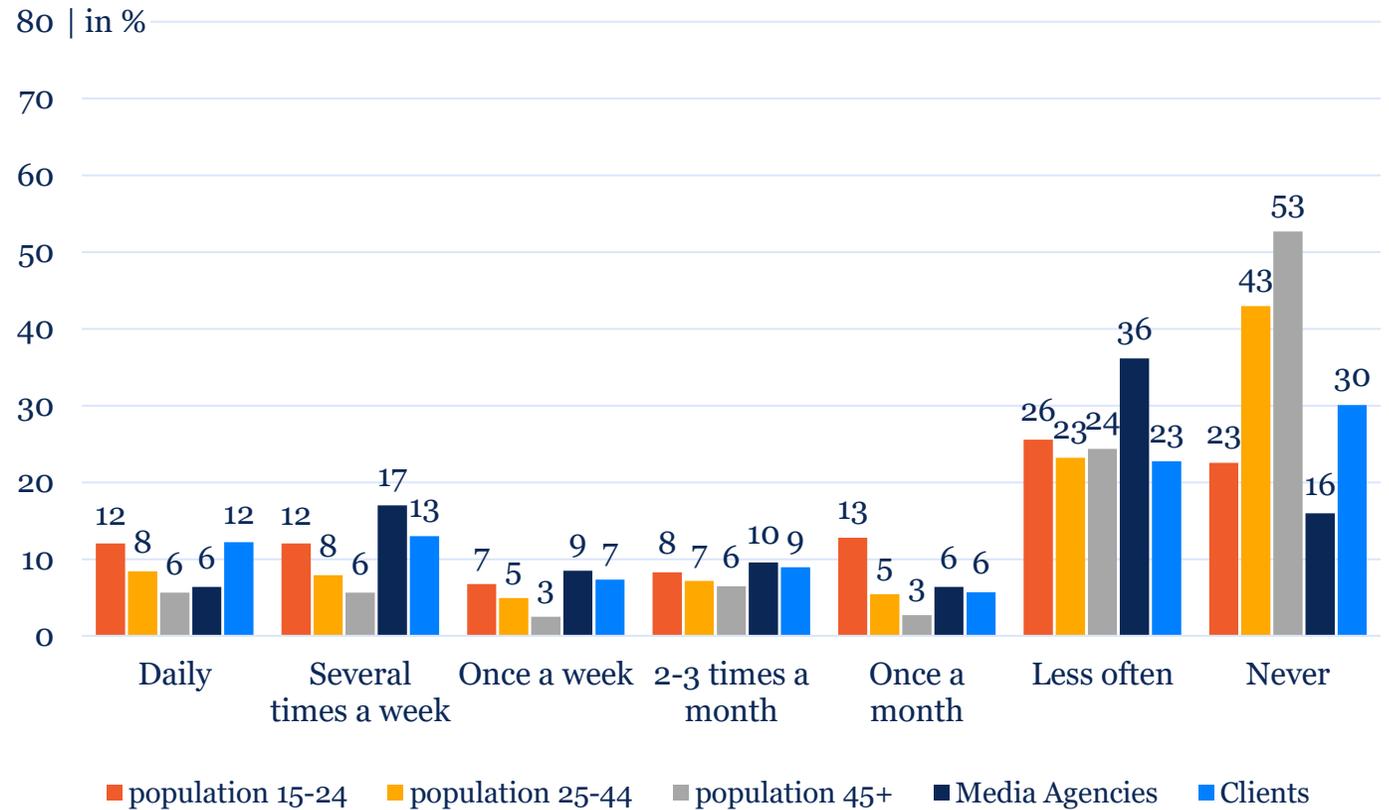
## LISTENING TO AUDIOBOOKS OR ANY OTHER SPOKEN WORD

Audiobooks are also listened to by media agencies' people and their clients more often than in the general population, but the difference is not as big as with other types of media.



# LISTENING TO AUDIOBOOKS OR ANY OTHER SPOKEN WORD

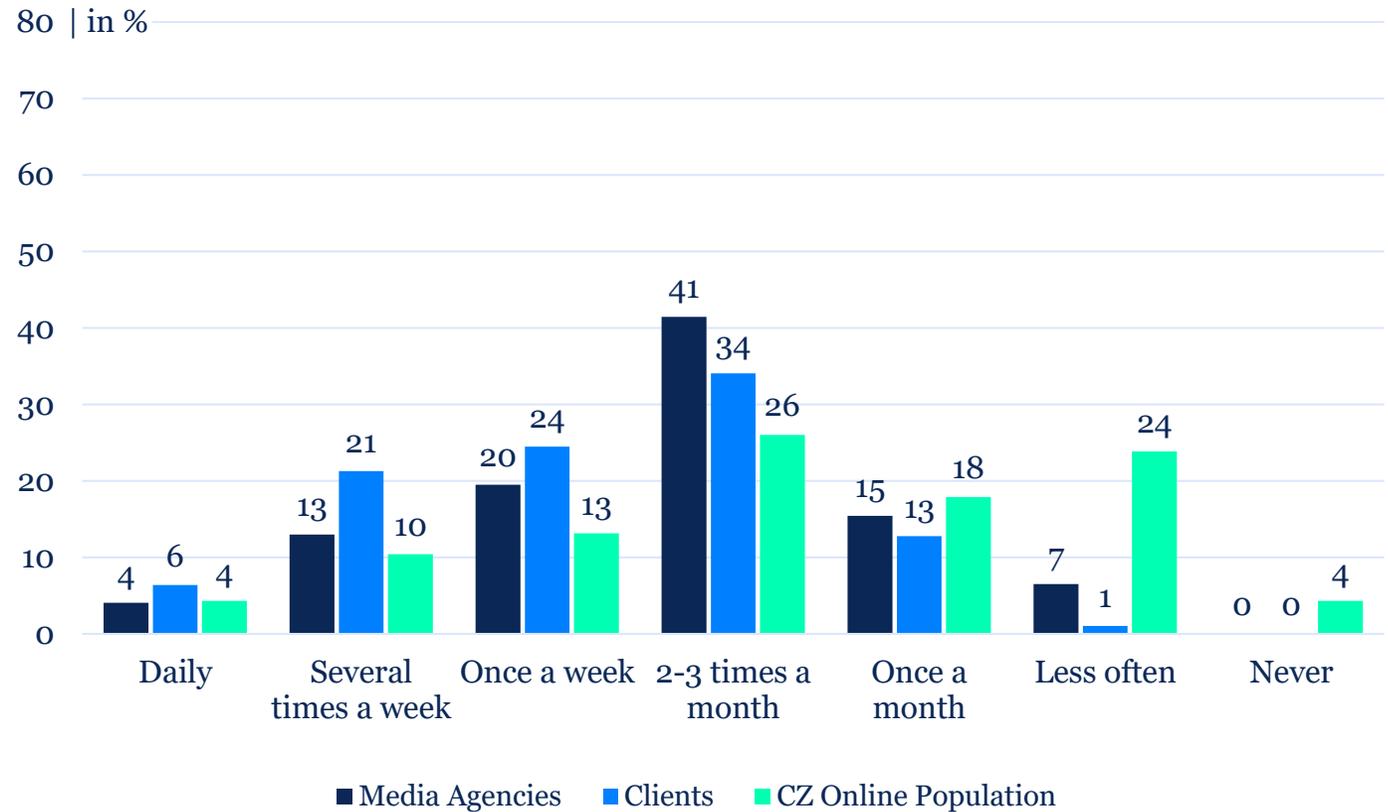
Listening to audiobooks is fun for both media agencies' people and their clients, and it is one of many areas where our habits are similar to the youngest age group.



# SHOPPING ONLINE

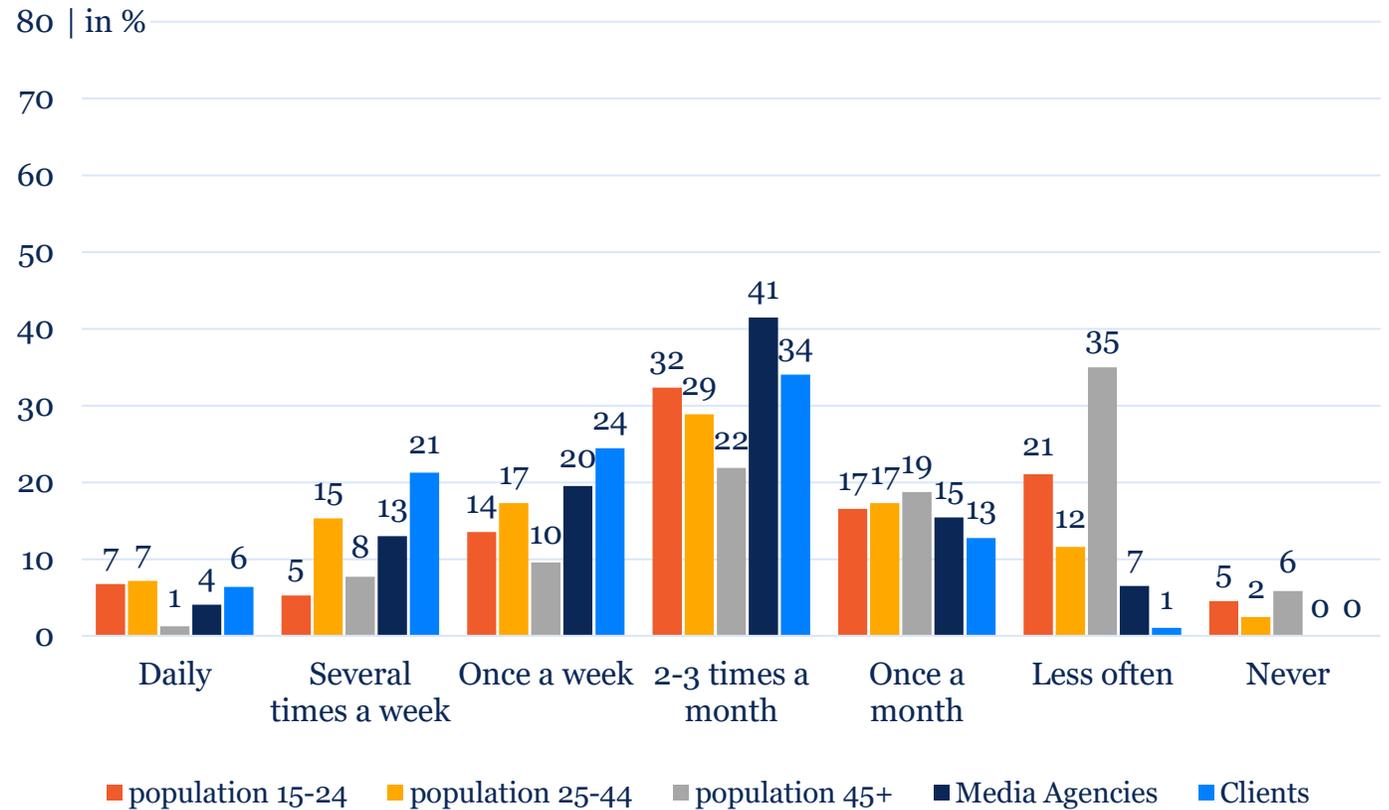
Media agencies' people and their clients shop online more often than the general population. 76% and 86%, respectively, of them shop online at least 2-3 times a month (in the non-media population it is only half of the people).

The high frequency is (apart from the age - see the following slide) also influenced by the place of residence (Prague and its surroundings, where you can still buy more things online - typically food).



# SHOPPING ONLINE

In terms of age subgroups, people over 45 differ significantly (a third of them shops online less than once a month).



# TV VS. ONLINE VIDEO

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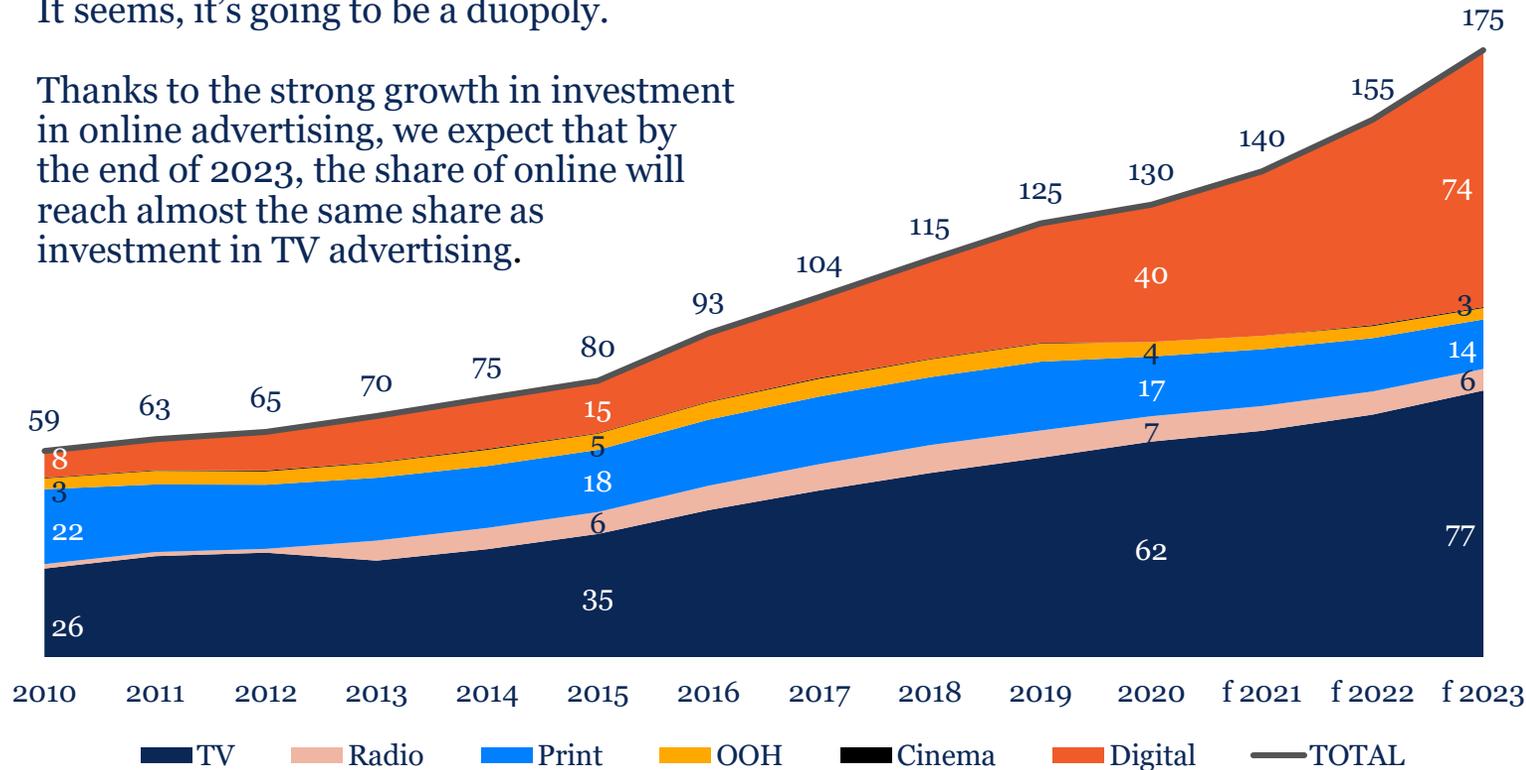
Is the TV broadcasting over? Is online capable to replace TV completely?

# TV AND ONLINE MEDIA INVESTMENTS DEVELOPMENT

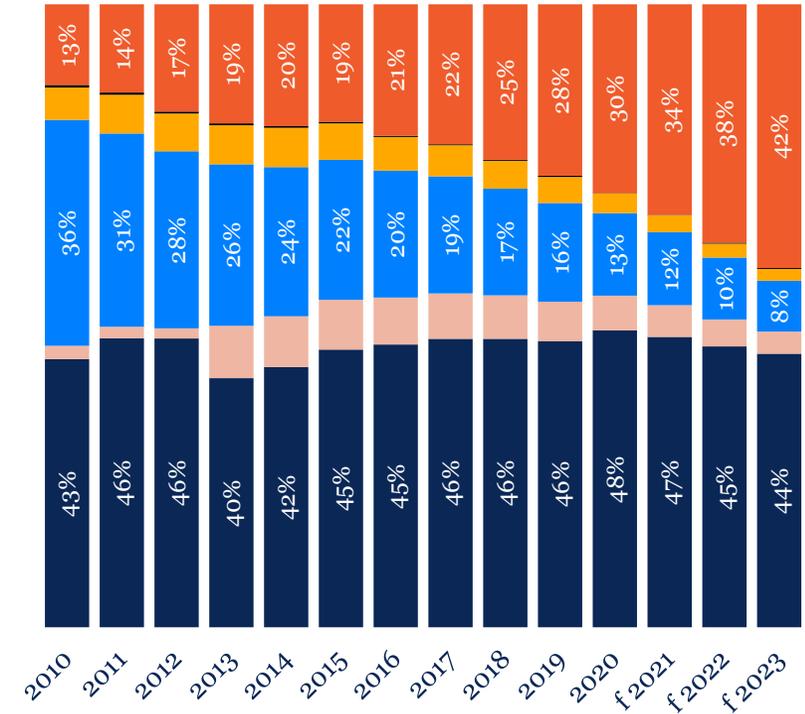
Media investments development by media type | in bil CZK

It seems, it's going to be a duopoly.

Thanks to the strong growth in investment in online advertising, we expect that by the end of 2023, the share of online will reach almost the same share as investment in TV advertising.



Shares of media investments by media type

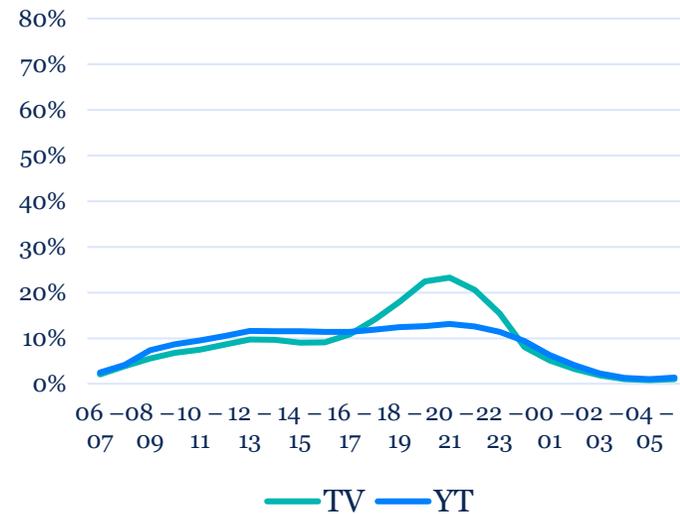


Source: Ad Intel, Nielsen Admosphere, SPIR (online), 2010 – 2020, GroupM estimate 2021-2023

# WATCHING TV AND YT DURING A DAY (DAILY REACH BY TARGET AUDIENCES)

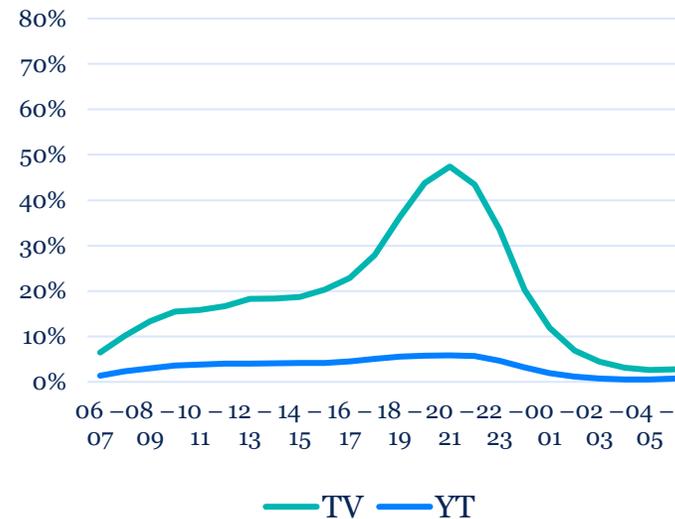
The main question of media planning is whether today's young people are going to return to the classic TV, because they will long for relax (“turning off”) in the evening (see the following slide) or they will stick to an active watching of online videos and VOD. Currently, however, in every age subgroup aged 30+ you build reach faster through TV.

## 15-29 y.o.



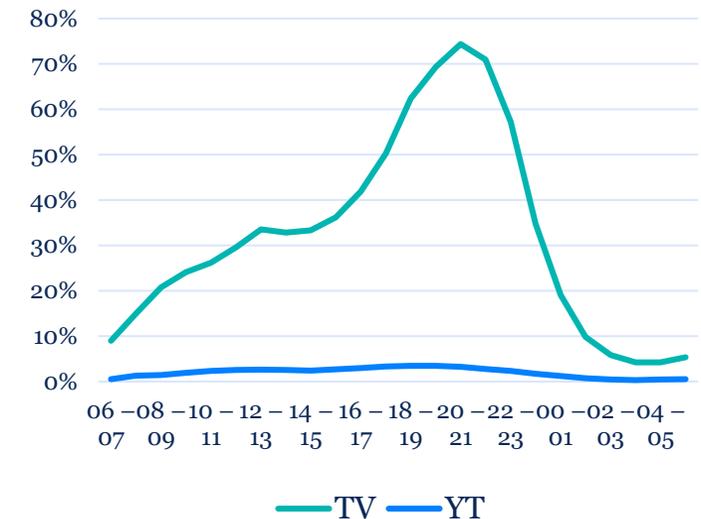
Very similar,  
TV higher just **by 7,6%**

## 30-49 y.o.



TV reach is **5× higher**

## 50-69 y.o.

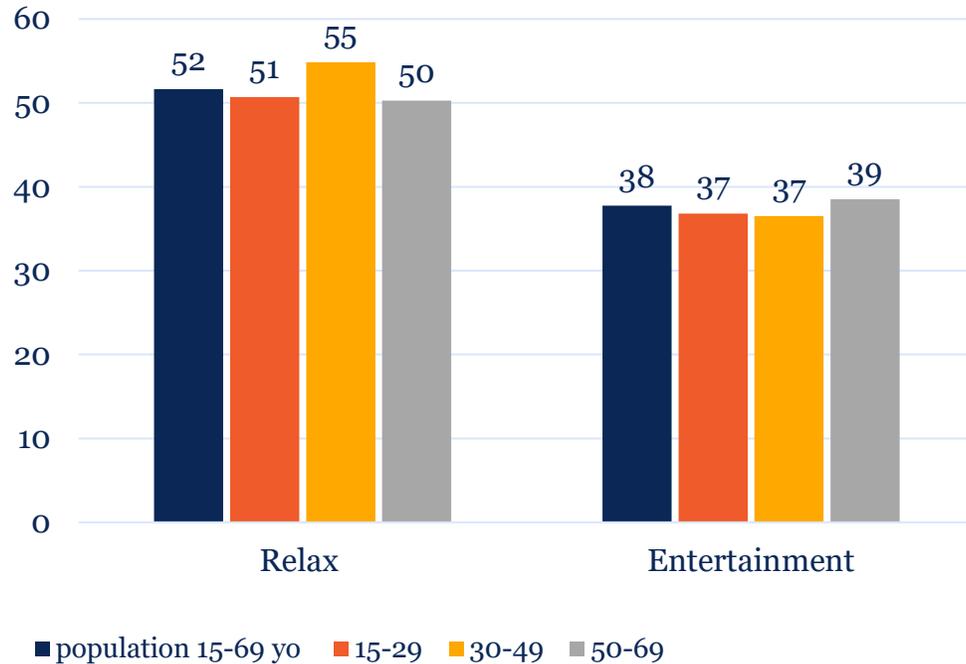


TV reach is **15× higher**

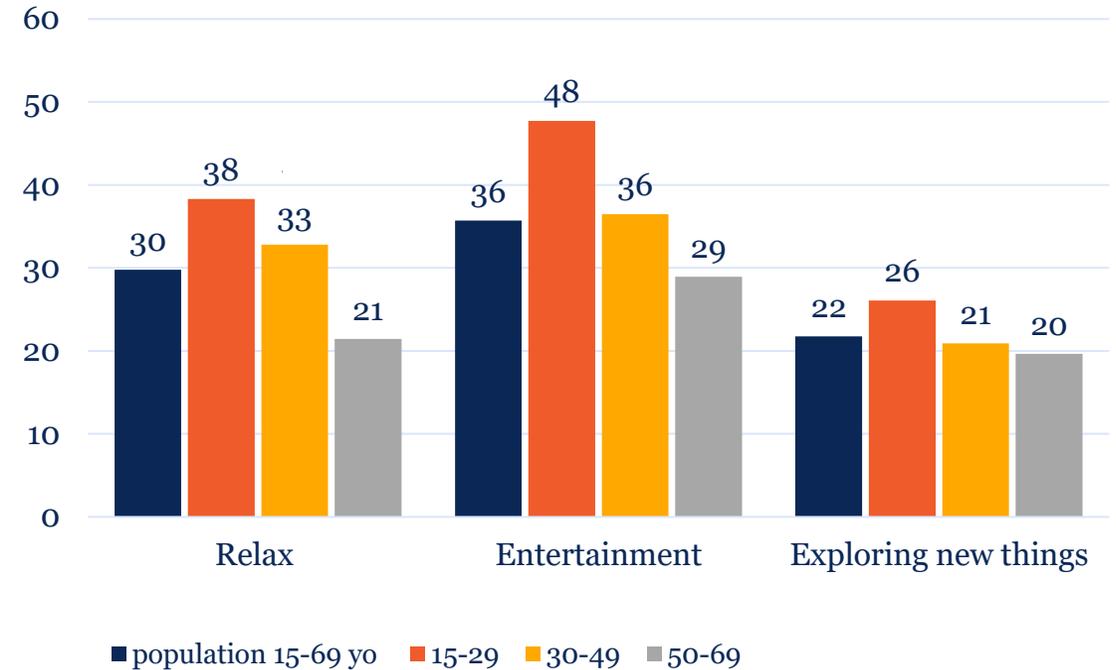
# WHAT PEOPLE EXPECT FROM VIDEO MEDIA TYPES

In case of TV, we mainly expect relax (to turn off, easily with something we've seen 10 times, because we don't have to think and concentrate at all). On the contrary, YouTube is mainly about fun, followed by relaxation and also discovering new things.

**Watching TV | in %**



**Watching online video | in %**



Source: GroupM Live Panel 2019

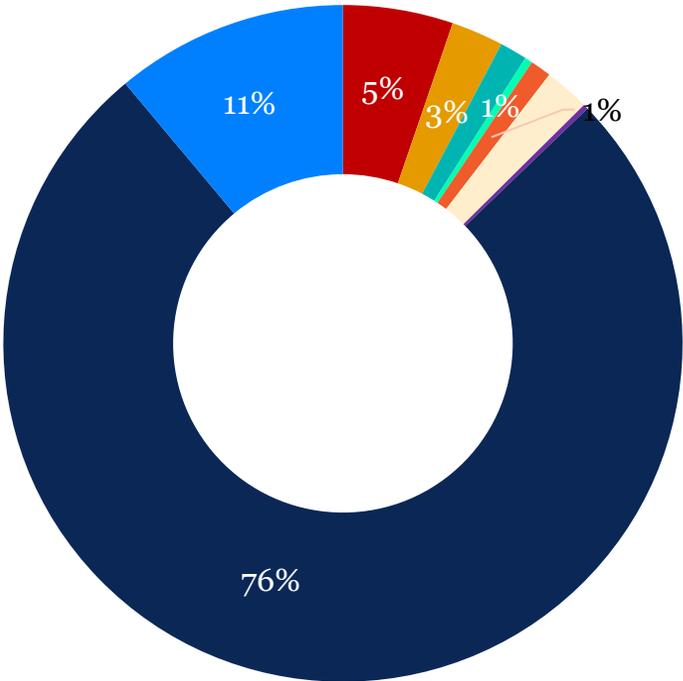
# WHAT CZECH „VIDEO“ DAY LOOKS LIKE 1/2

## (TARGET AUDIENCE ALL 16-69 YEARS)

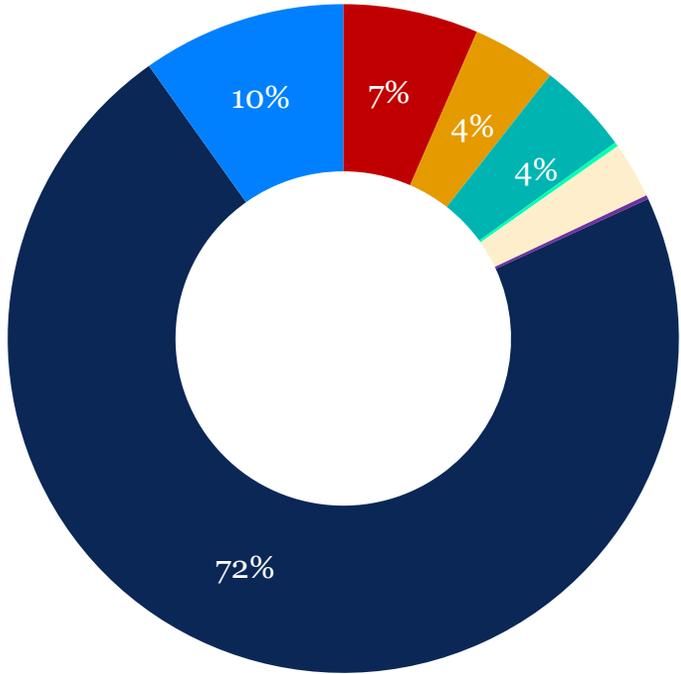
At GroupM, we looked at the data we have and tried to calculate what a typical Czech video day looks like (in terms of video content consumed either on TV or online) and what is the share of individual media types and channels. And the same we did for a video ad consumed. We offer it as an initial step in the effort to capture the Czech video day.

**Video day lasts 4h:54m** | 87% is in TV

**Ad day lasts 0h:24m** | 81% is in TV



- YouTube
- FB
- Other social networks (IG, Tiktok, Snapchat)
- Adult XXX video
- VOD services
- Other online video
- Cinema
- TV live
- TV playback



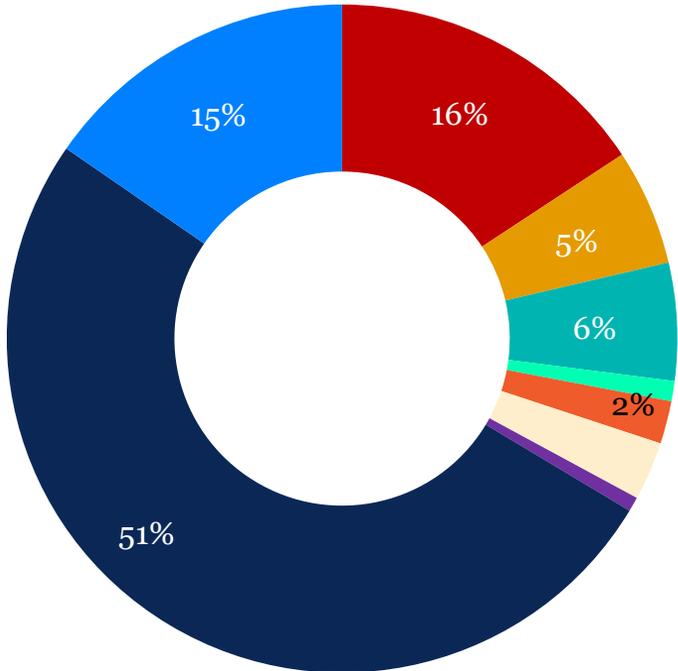
Source: ATO-Nielsen Admosphere (TV), AdMeter (digital, radio), mPanel/UFD (Cinema)

# WHAT CZECH „VIDEO“ DAY LOOK LIKE 1/2 (TARGET AUDIENCE ALL 16-34 YEARS)

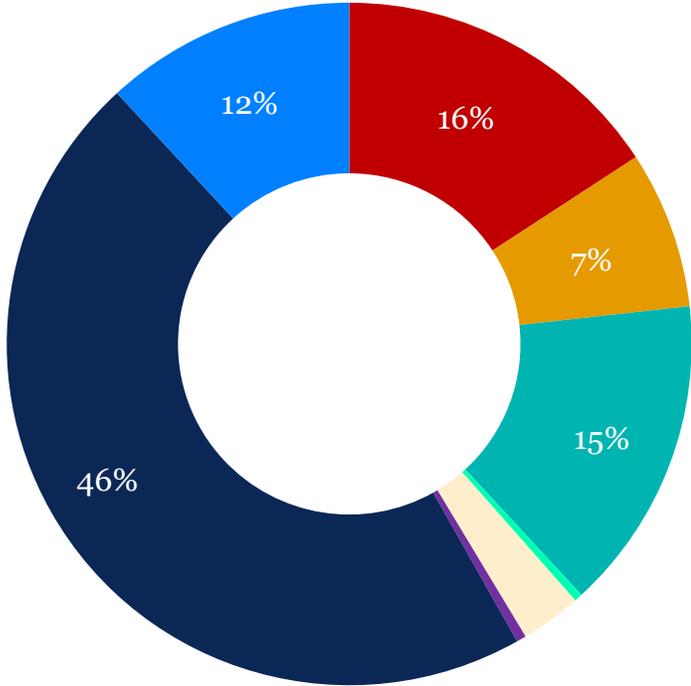
So, take it please as a springboard for a debate how to produce similar charts as we see, for example, from examples in the UK or US. (for example, we know that VOD is definitely underestimated, especially for this younger target group)

**Video day lasts 2h:48m | 66% is in TV**

**Ad day lasts 0h:17m | 57% is in TV**



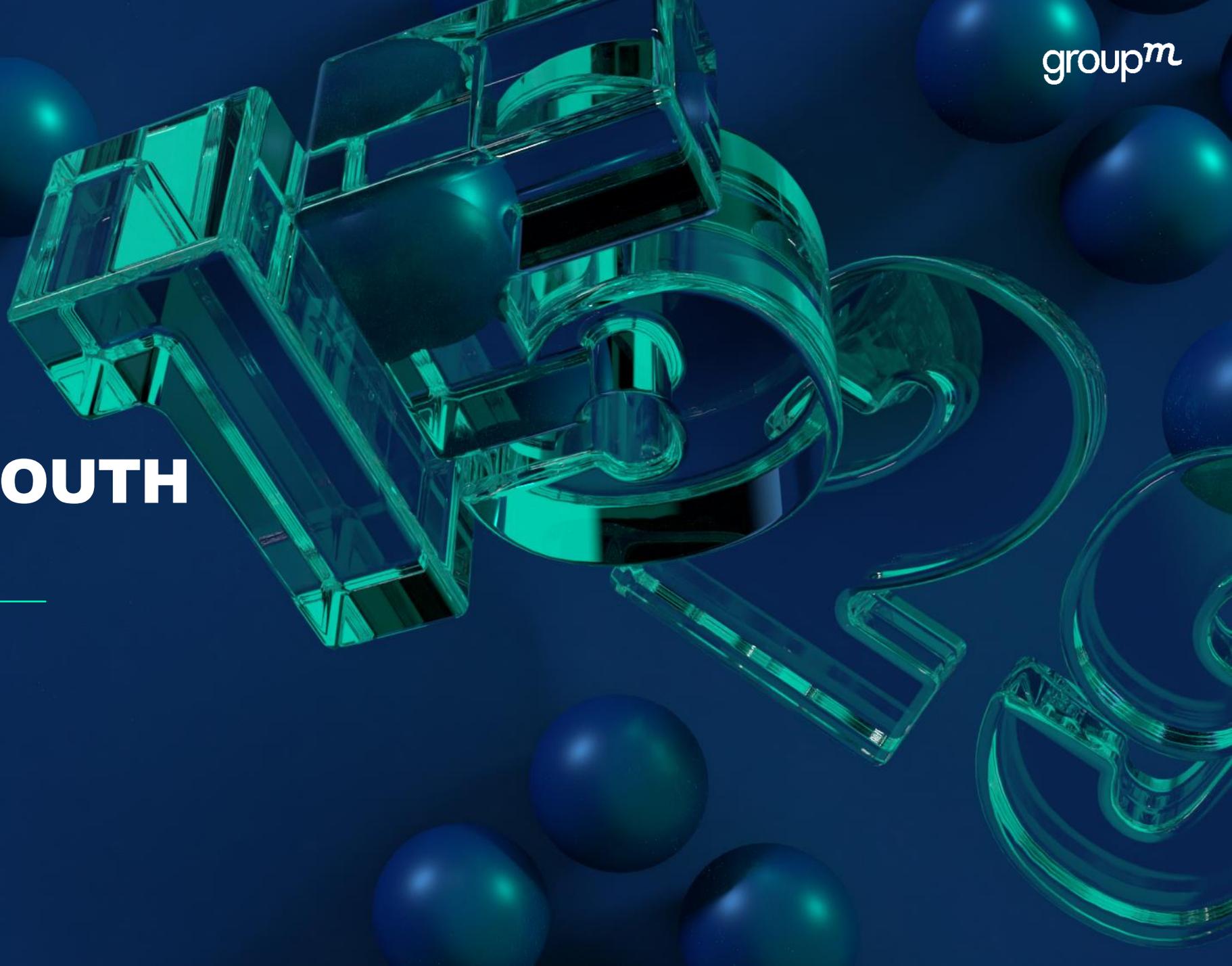
- YouTube
- FB
- Other soc. networks (IG, Tiktok, Snapchat)
- Adult XXX video
- VOD services
- Other online video
- Cinema
- TV live broadcast
- TV timeshifted/www



Source: ATO-Nielsen Admosphere (TV), AdMeter (digital, radio), mPanel/UFD (Cinema)

# ETERNAL YOUTH BUBBLE

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# **MEDIA AGENCIES FOLK AND CLIENTS HAVE OFTEN SIMILAR MEDIA HABITS AS YOUNG CZECHS, BUT NOT ALL ARE YOUNG. FAR FROM IT.**

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According to most media briefs that reach GroupM agencies, the Czech Republic is a fantastic country. It is a country that does not have to deal with something like the pension reform at all, because there are simply no people over 45. Most Czechs are cool, cheerful aged up to 40 y.o. at worst. If someone over 45 or even 50 y.o. inadvertently appears in this world, it's a creature from another world. They hardly need to eat, drink, wash clothes or take care of his/her hygiene, they live a natural life without appliances, they only take some medicine or drink alcohol.

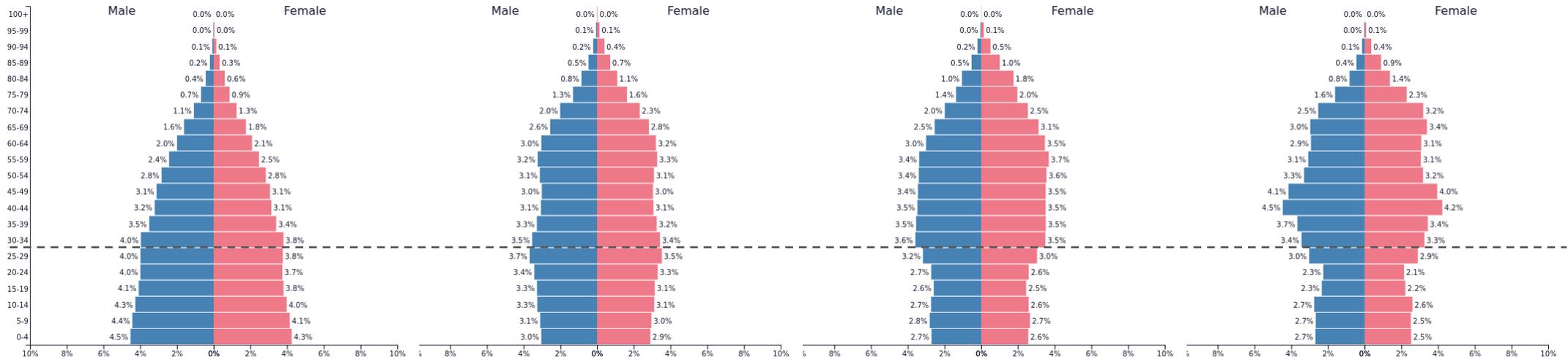
Of course, we exaggerate a bit, and we know that targeting young people is important in terms of attracting future consumers and varies across goods and services types. Still, when looking at the Czech socio-demographic data, it's hard to avoid the question of whether the young people may be enough for our clients' business growth.

We know that the obsession with young audiences in campaigns targeting has, among other things, a global cause - and to some extent justified. From a global perspective, most of the population is really under the age of 40. But the problem is that we live in a part of the world where it isn't. In Europe, at best, it is half and half (half the population under 40, half over 40).

And in the Czech Republic? Thanks to the strong 1970s generation, significantly more than half of the population is over 40 years old. After all, the average age of the Czechs is almost 43 years. And when it comes to marketing centers of the world, where our strategies often come from, the UK has still a younger population than Czechia. The US differ even more - young people do really represent important age group in terms of their numbers.

# WHAT DOES THE AGE STRUCTURE OF SELECTED POPULATIONS LOOK LIKE

The young population does dominate the world, but not in Europe. And as you can see, Czechia really isn't a country full of young people - that's also why there "aren't people" (and they won't be anymore - they had not been born). The dashed line represents the age limit of 30 years.



**World | 2019**  
Population: 7,713,468,205

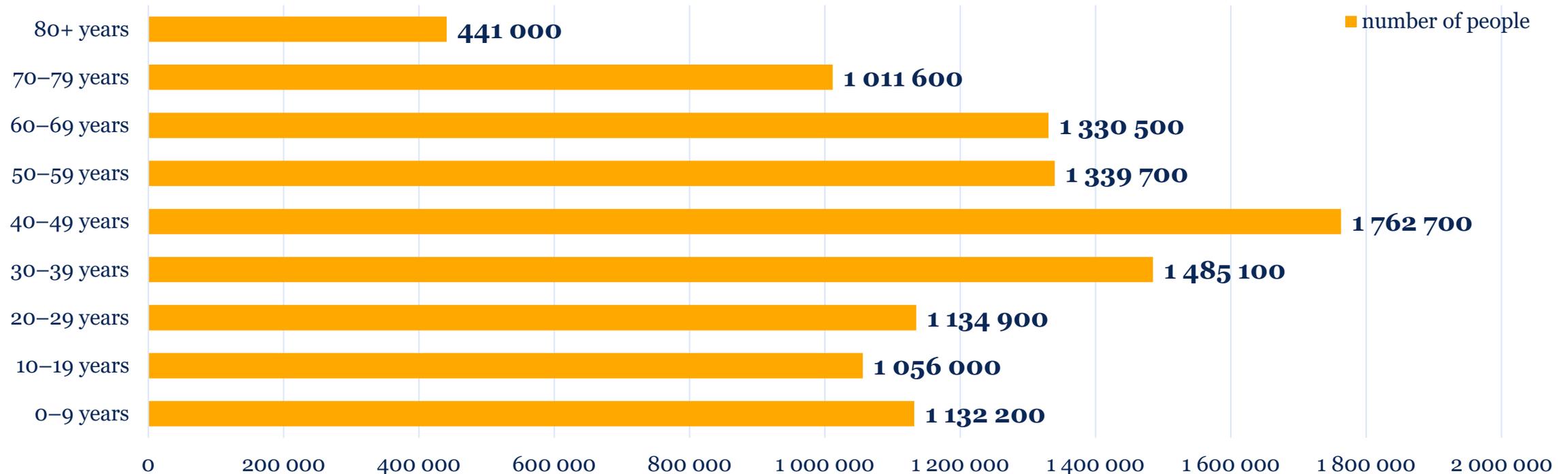
**United States of America | 2020**  
Population: 331,002,647

**Europe | 2019**  
Population: 747,182,815

**Czech Republic | 2020**  
Population: 10,708,982

## SO, IS IT ENOUGH TO FOCUS ON THE YOUNG ONES IN TERMS OF BUSINESS IN THE CZECH REPUBLIC?

As you can see from the absolute numbers of the individual age groups size in the Czech population (source: CZSO, 2020), young people are in short supply and the number of consumers in young age subgroups is significantly smaller than in the age of 30 to 60.



# AFTER REACHING THE AGE OF 45, HOWEVER, PEOPLE WILL BECOME TERRIBLY POOR AND THERE IS NO POINT IN TARGETING THEM

Concentrating primarily on the young part of the Czechs is a bit strange not only in terms of the size of these age segments (see above), but also in terms of the real distribution of assets and disposable income. As you can see below, people over the age of 45 are going to live in 2 members households again (as the children become independent) and still with two incomes. In addition, they live in their own house and half of them belong to the ABC1 groups. Do they really not buy anything, and can they not enjoy their money?

	25-34 years	35-44 years	45-54 years	55-64 years
LIVES IN OWN HOUSE	63 % 	79 % 	81 % 	82 % 
ABC1 SHARE	53 % 	42 % 	47 % 	51 % 
% OF HH WITH MAX 2 MEMBERS	36 % 	21 % 	34 % 	65 % 
% OF HH WITH 2 MEMBERS WITH INCOME	81 % 	90 % 	77 % 	78 % 

Source: MML TGI 2020 MEDIAN

# STATEMENTS (NOT ONLY ABOUT MEDIA)

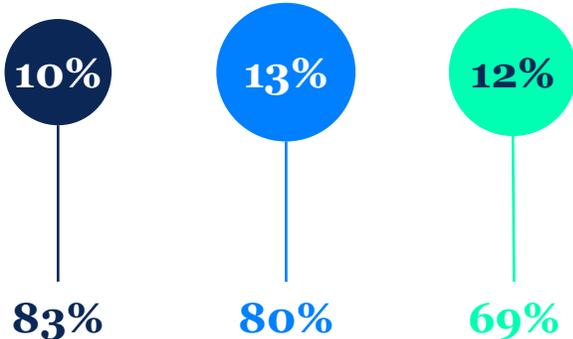
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Finally, a few other statements that we gave to the media professionals and the general population

# EVALUATION OF MEDIA TYPES STATEMENTS 1/2

*„All I need for my life is the internet“*

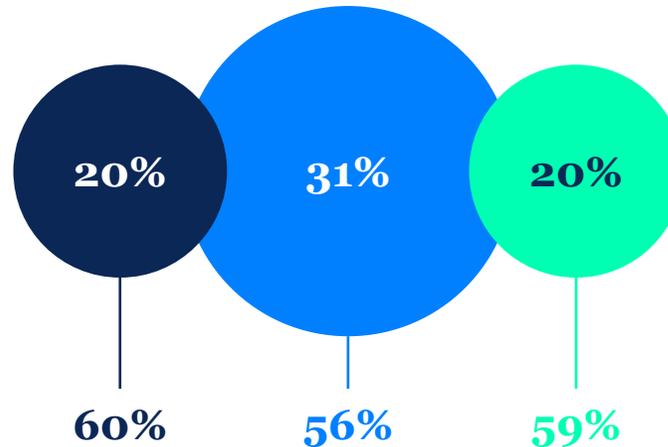
**Agree**



**Disagree**

*„I can't imagine my life without social networks“*

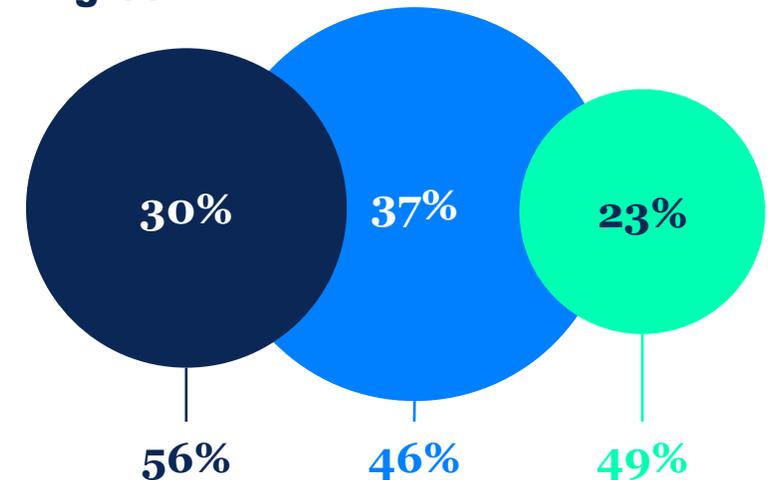
**Agree**



**Disagree**

*„Everyone is watching Netflix or HBO“*

**Agree**



**Disagree**

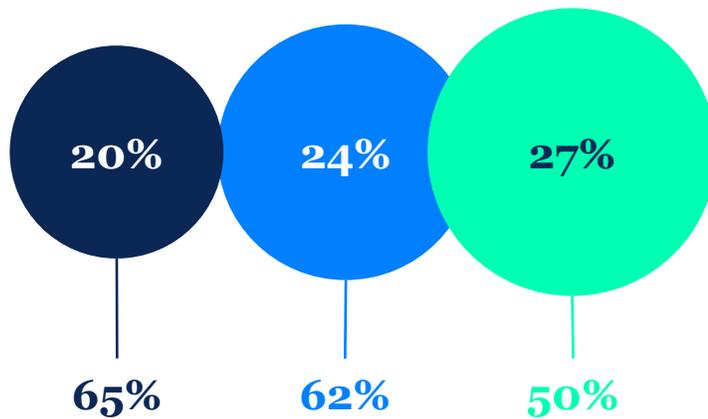
● Media Agencies ● Clients ● Population

n=167/114/1018

## EVALUATION OF MEDIA TYPES STATEMENTS 2/2

*„ Social networks are my primary source of information“*

**Agree**

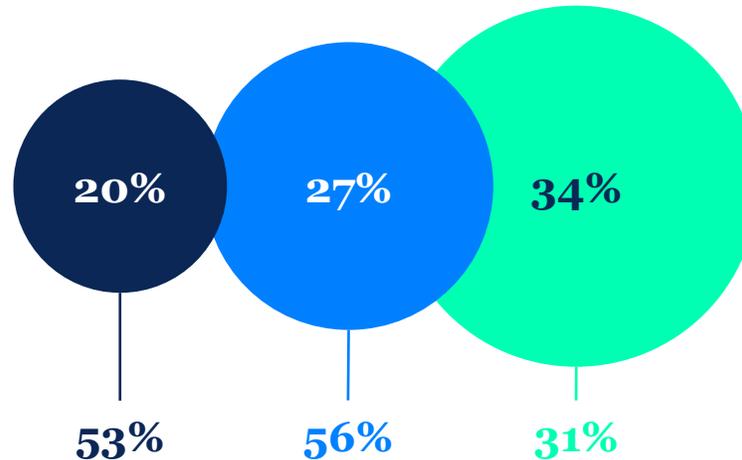


**Disagree**

● Media Agencies ● Clients ● Population

*„ Everyone downloads series and movies from a variety of repositories“*

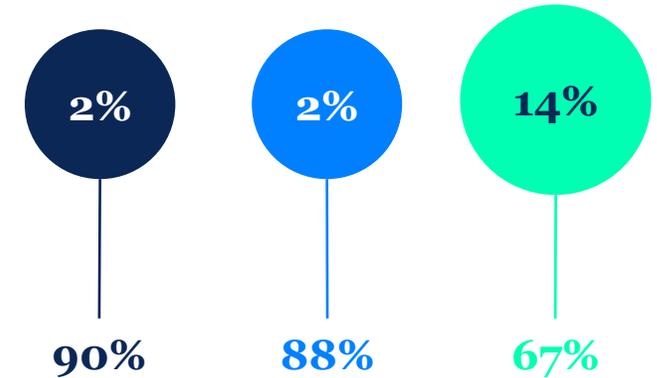
**Agree**



**Disagree**

*„ Nobody reads classic books anymore“*

**Agree**



**Disagree**

n=167/114/1018

# HAPPY TO ANSWER YOUR QUESTIONS

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GROUP M, NOVEMBER 2021