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## MAIN FACTORS OF TRANSFORMATION OF INDUSTRIAL STRUCTURE OF MARKETING IN THE SECOND DECADE OF THE XXI CENTURY

*The change in the orientations of Ukrainian society towards European integration in recent years has accelerated the inevitable "global digitalization", which in turn has led to significant changes in consumer behavior at almost all levels of consumer activity. This applies to both the characteristics of consumer awareness, their ability to choose alternatives, and directly the main channels of consumer information, as well as the organization of feedback between producers and consumers. Hence, it is quite logical to hypothesize significant changes in the industry structure of marketing - both as a practical activity and as a science. Indeed, following the changes in consumer behavior and seeking to more effectively study and predict market changes, marketing could not maintain a stable industry structure in today's changing environment. The emergence of new information channels, new channels of promotion and marketing, coverage of new channels in an increasing part of the market space lead not only to the rapid development of new marketing industries, but also the decline of some areas that were considered traditional.*

*Key words: global digitalization, marketing, branch structure, consumer.*

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## ОСНОВНІ ЧИННИКИ ТРАНСФОРМАЦІЇ ГАЛУЗЕВОЇ СТРУКТУРИ МАРКЕТИНГУ В ДРУГОМУ ДЕСЯТИРІЧЧІ ХХІ СТОЛІТТЯ

*Зміна орієнтирів українського суспільства на євроінтеграцію за останні роки прискорила неминучу «глобальну діджиталізацію», яка своєю чергою зумовила значні зміни в поведінці споживачів практично на всіх рівнях споживацької активності. Це стосується як характеристик обізнаності споживачів, їх можливостей щодо вибору альтернативних варіантів, так і безпосередньо основних каналів отримання інформації споживачем, а також організації зворотного зв'язку між виробниками та споживачами. Звідси цілком логічно є гіпотеза щодо істотних змін галузевої структури маркетингу – і як практичної діяльності, і як науки. Дійсно, прямуючи за змінами споживацької поведінки та прагнучи як найефективнішого вивчення та прогнозування ринкових змін, маркетинг не міг зберегти сталою галузеву структуру в сучасних мінливих умовах. Виникнення нових інформаційних каналів, нових каналів просування та збуту продукції, охоплення новими каналами все більшої частини ринкового простору зумовлюють не тільки швидкий розвиток нових галузей маркетингу, але й занепад деяких напрямків, що вважалися традиційними.*

*Ключові слова: глобальна діджиталізація, маркетинг, галузева структура, споживач.*

The change in the orientations of Ukrainian society towards European integration in recent years has accelerated the inevitable "global digitalization", which in turn has led to significant changes in consumer behavior at almost all levels of consumer activity. This applies to both the characteristics of consumer awareness, their ability to choose alternatives, and directly the main channels of consumer information, as well as the organization of feedback between producers and consumers. Hence, it is quite logical to hypothesize significant changes in the industry structure of marketing - both as a practical activity and as a science. Indeed, following the changes in consumer behavior and seeking to more effectively study and predict market changes, marketing could not maintain a stable industry structure in today's changing environment. The emergence of new information channels, new channels of promotion and marketing, coverage of new channels in an increasing part of the market space lead not only to the rapid development of new marketing industries, but also the decline of some areas that were considered traditional.

At the same time, increasing competitive pressure on Ukrainian producers in both foreign and domestic markets requires maximum efficiency of marketing management to ensure sustainable development of Ukrainian enterprises, which highlights the need to study changes in the sectoral structure of marketing under the influence of innovative technologies.

Given the negative impact of globalization processes on the Ukrainian economy, the introduction of innovative marketing technologies and the development of new marketing industries are of strategic importance, which leads to increased interest of scientists in rethinking the sectoral structure of marketing. However, the analysis of scientific works of both foreign [7–11] and domestic [3–5] authors, allowed to establish that, despite the growing interest in the latest areas of marketing, the emergence of which directly associated with the development of innovative technologies, a significant number of available works are either descriptive or consider certain areas or trends in modern marketing, without analyzing the causes and consequences of structural changes.

The scientific contribution of I.V. Lilyk, whose monograph analyzes the main changes in marketing in the era of global informatization [2]. However, IV Lilyk does not consider structural changes in marketing, but the transformation of marketing as such, focusing on the analysis of the crisis of traditional marketing and understanding the category of intuitive consumer marketing [2, p. 13].

In addition, a significant place in the study of IV Lilyk is occupied by the categories "outbound marketing" and "inbound marketing", first proposed by "Hubspot". Thus under outgoing marketing ("outbound marketing") in the monograph it is offered to understand traditional marketing of the enterprise, and under incoming marketing ("inbound marketing") - transition of the power in marketing on the part of the consumer [2, p. 110].

Interesting from the point of view of marketing practice is the work of Deep Patel, author of the bestseller "A Paperboy's Fable: The 11 Principles of Success", "10 Marketing Trends to Watch in 2019". In this paper, the author considers the main innovative technologies, methods and models of global marketing in 2019 [5]. However, recognizing the importance and timeliness of this work, it is necessary to note its mostly practical value, as the trends identified by the author are presented mainly descriptively. In addition, since at the time of the study Ukraine's technological gap with the most developed countries remained significant, not all of the author's proposed marketing trends should be considered relevant for Ukrainian enterprises, which indicates the need for additional research to adapt the trends to the realities of the Ukrainian economy.

According to the author, the establishment and analysis of the main factors that significantly affect the development of Ukrainian marketing in the modern period should be considered a priority in the study of the transformation of the sectoral structure of marketing. One of the main factors changing the current Ukrainian marketing, the author considers the rapid introduction of digital technologies at the global level, which is called "global digitalization".

The basis of "global digitalization" is a significant increase in Internet penetration, which in Ukraine is due to a number of factors. The main factors in the rapid growth of Internet penetration into Ukrainian society, according to MediaHead, should be considered:

- increasing the availability of the Internet and access devices to it;
- the transition of businesses to online and the growth of the overall usefulness of the Internet for humans [3].

According to the author, this list should be supplemented by such an important factor as the online access to public and social services, as this process has had a decisive impact on the most conservative categories of older users.

Changes in the number of devices for Internet access per capita in Ukraine aged 16 years [5] are shown in Fig. 1.

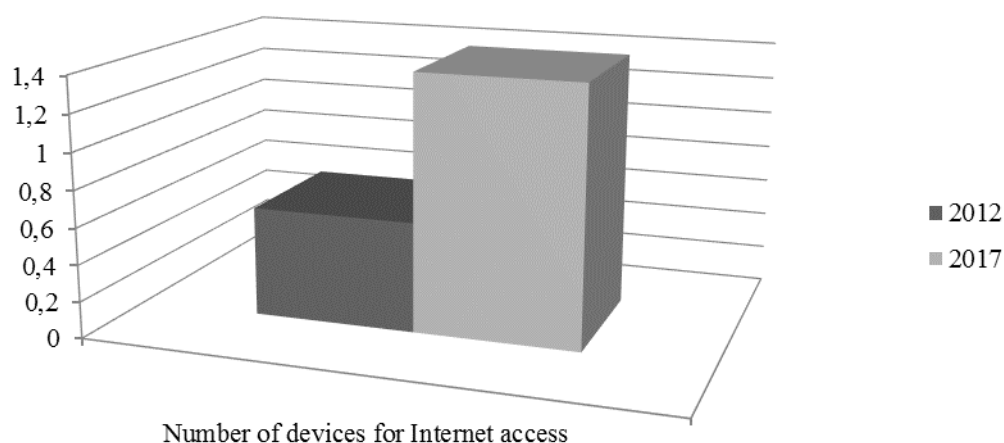


Fig. 1. Changes in the number of devices for Internet access per capita in Ukraine aged 16 years

As can be seen from Fig. 1, over the past five years, the number of devices for Internet access per capita in Ukraine over the age of 16 has increased more than 2.3 times and amounted to 1.4 devices (against 0.6 at the end of 2012) [5].

The dynamics of relative indicators of Internet penetration in Ukraine in 2004-2019 is presented in Fig. 2.

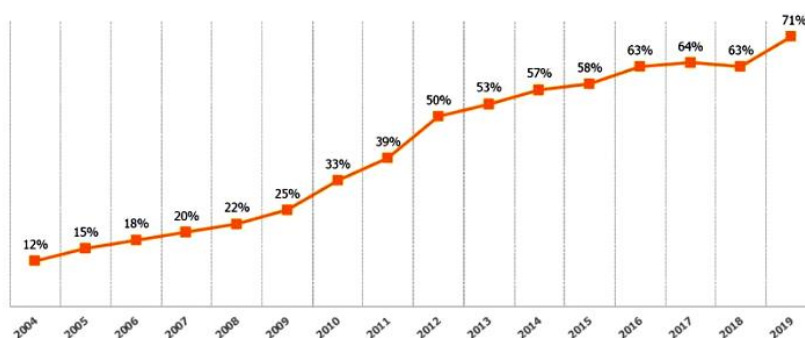


Fig. 2. Dynamics of Internet penetration in Ukraine in 2004-2019 [1]

As can be seen from Figure 2, during the period 2004–2019, Internet penetration rates in Ukraine increased from 12 % to 71 %, or almost 6 times (5.92 times) [1].

At the end of the period, 7 out of 10 Ukrainians were regularly online, which undoubtedly significantly affected the main characteristics of consumer preferences [5].

According to modern researchers, the decisive role in increasing the growth rate of Internet penetration in Ukraine belongs to the mobile Internet. The development of mobile Internet and, as a result, the increase in opportunities for its use, provided a major increase in Internet penetration in Ukraine, as it is the users of mobile devices accessing the network provide the vast majority of regular users. Data on the types of access of "regular" Internet users are shown in Fig.3. During the study, respondents were given the opportunity to choose several options.

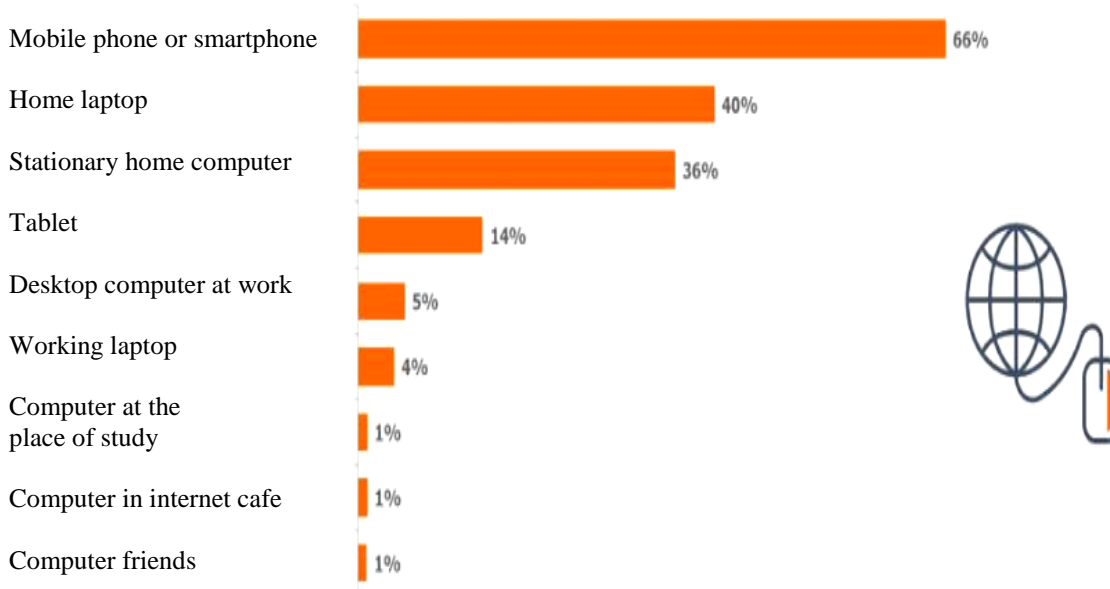


Fig. 3. Types of access of "regular" Internet users [1]

As can be seen from Figure 2, the main advantages of the device for Internet access at the time of the study were distributed as follows:

- about 66 % of users use mainly a mobile phone or smartphone to access the Internet;
- 40 % – home laptop,
- 36 % – desktop home computer;
- 14 % – tablet [1].

The share of other devices for Internet access does not exceed 5 % [1].

The rapid spread of the Internet in Ukraine not only had very important consequences for the dynamics of the development of individual information channels, but also became a starting point for the transformation of the consumer as such.

First of all, it should be noted the declining importance of television as a means of obtaining information and the number of views, which was the result of changes in media behavior of consumers and preferences of Ukrainians under the age of 30 (Generation Z). Over the past five years, television audiences have declined by 5 % – mainly due to the younger generation Z, who preferred online content and VoD (Video on Demand) – video on demand [5]. Data on the dynamics of the choice of television as a channel for obtaining information by Ukrainians under 30 years of age are provided in Fig. 4.

As can be seen from Fig. 4, in 2017, 9 % of Ukrainians under the age of 30 stated a complete refusal to watch television (against 2 % in 2012) [5]. Another 7 % of this age group turn to watching television no more than once a month, while in 2012 this figure was 3 % [5].

Television loses to the Internet in terms of user experience. Thanks to the Internet and smartphones, users decide for themselves what, when and on which devices to watch. These changes are gradually affecting the older generations, due to which since 2015 the number of hours spent by viewers watching television is gradually decreasing, over the past two years – by 1 hour per week [3].

In addition, television is a one-way communication channel that ceases to meet the increased demands of consumers for the quality of communications, while the Internet provides the consumer with full-fledged two-way communication and social interaction.

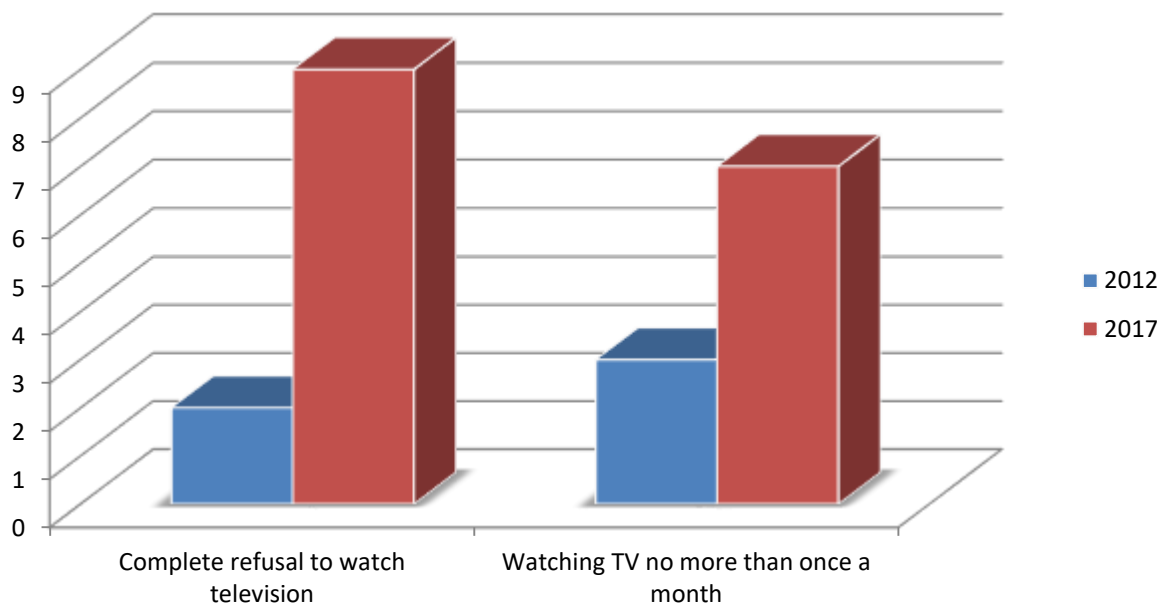


Fig. 4. Dynamics of television choice as a channel for obtaining information by Ukrainians under 30, % [5]

An important trend in terms of change should be considered changes in the age structure of Internet and television users. Data on the daily coverage of the audience of media channels by age as of 2018 are provided in Fig. 5.

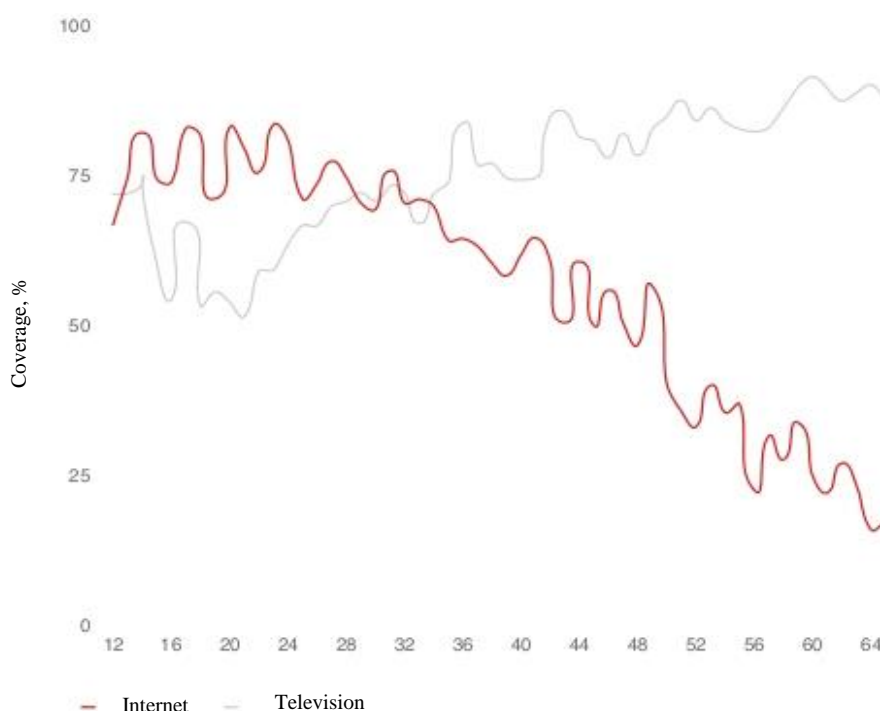


Fig. 5. Daily coverage of media channels by age [5]

As can be seen from Figure 3.5, the average user of both the Internet and television is getting older, but the causes and consequences for these communication channels are quite opposite: television loses a young and well-off audience, which over time will negatively affect the advertising of youth and bonuses. brands, while the Internet increases the involvement of audiences over the age of 45, for whom the Internet today is no longer something unfamiliar and incomprehensible [5].

Thus, the main factor in the transformation of the industry structure of marketing at the present stage should be considered the rapid spread of innovative technologies and, above all, the rapid penetration of the Internet, including - mobile. Increasing Internet penetration that in Ukraine caused not only changes in the channels of information, but also affected the consumer and the market itself. Researchers note the transition online not only to a

significant number of entrepreneurship and commerce, but also a significant share of public and social services. There are also changes in the requirements of consumers to the channel of information: the modern consumer has become more demanding and not satisfied with a one-way channel of information, requiring full two-way communication and social interaction, which could not be reflected in the marketing structure as such.

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