

Krise důvěry Krise pozornosti Jak pomoci značkám růst?

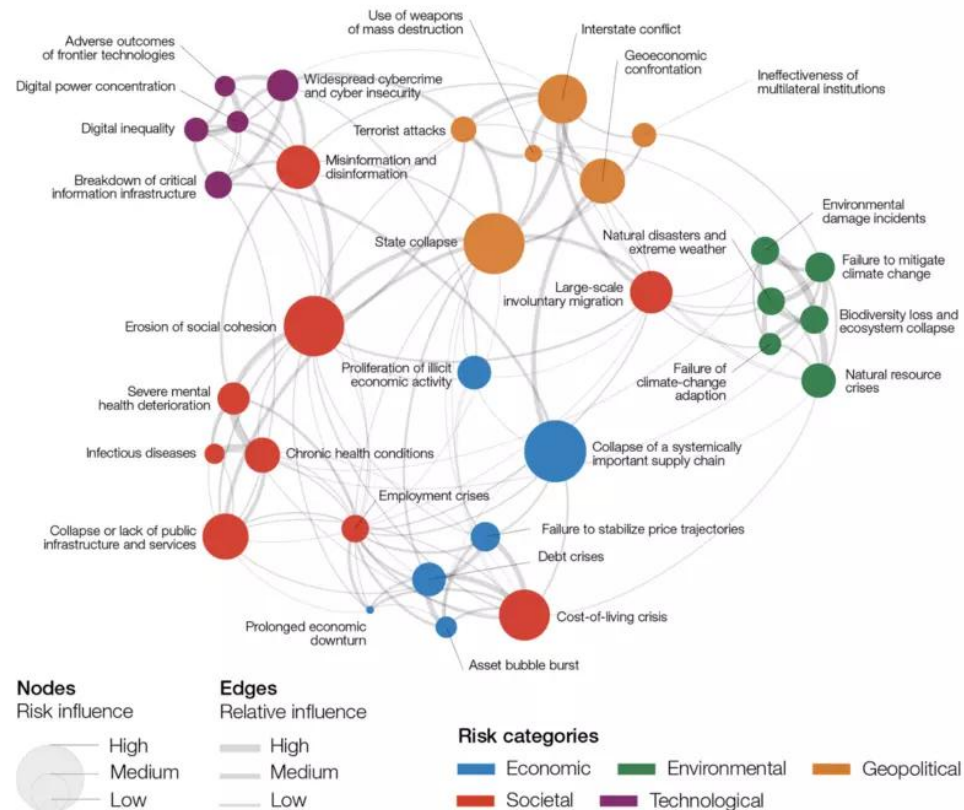
Jan Binar, McCann

Žijeme v době plykrize

Jakou roli v ní hrají media?

Global Risks Report 2023

Global risks landscape: an interconnections map



Source: World Economic Forum, Global Risks Perception Survey 2022-2023

Média

Od páteře společnosti, k algoritmické pijavici

Watchdog of Democracy / Hlídací pes
demokracie

Guardian of Public Interest / Strážce veřejného
zájmu

Guardian of Democracy / Strážce demokracie

Fifth Estate / Pátá mocnost

Fourth Estate / Čtvrtá mocnost

Marketplace of Ideas / Tržiště idejí

Voice of the People / Hlas lidu

Voice of the Voiceless / Hlas bezmocných

Conscience of Society / Svědomí společnosti

Pillar of Public Discourse / Pilíř veřejné diskuse

Fake News Factory / Fabrika falešných zpráv

Šíření dezinformací a falešných zpráv

Echo Chamber / Ozvěnová komora

Zesilování politické radikalizace a polarizace

Hate Factory / Továrna na nenávist

Šíření nenávisti a extremistického obsahu

Doomscrolling Platform / Platforma pro
doomscrolling

Poškození duševního zdraví

Surveillance Capitalism / Kapitalismus
dohledu

Porušování soukromí a masový sběr dat
uživateli

Jak v tomto rámci pomoci značkám
budovat lepší svět, pomáhat lidem žít
lepší životy?

At a glance: The global media market

According to WARC forecasts, advertising spend topped \$1tn for the first time in 2024.

Linear TV now accounts for just 14.3% of global advertising spend, down from a peak of 41.3% in 2013, though it still serves an important role in the mix. Spend on linear TV is still more than 4x higher than on connected TV (CTV).

Outdoor spend also performed well in 2024, benefitting from an increase in digital inventory.

Cinema (+6.1%) was also up in 2024, though declines are expected across **broadcast radio** (-2.3%) and **publishing** (-2.4%).

Pure play Internet, which encompasses advertising revenue

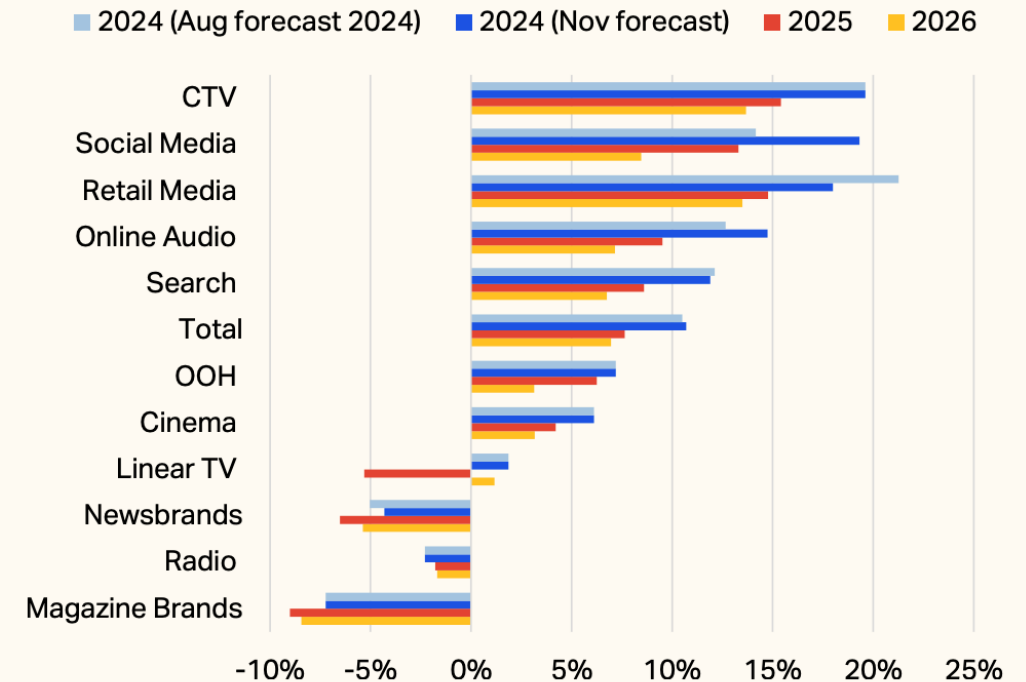
among online-only businesses such as Alphabet, Amazon and Meta, is set to grow by 14.1% to a total of \$741.4bn – over two-thirds (68.8%) of all ad spend.

Social media is the largest individual sector within pure play internet, and the largest advertising medium of all by extension, with a total of \$252.7bn this year, equivalent to 23.5% of the global ad market.

We expect social media to be the second-fastest growing channel of 2024, just behind connected TV (+19.6%) and ahead of retail media (16.4%), which is set to continue its rapid growth through 2025.

Global ad market grew 10.7% in 2024, with online media leading the charge

Forecast year-on-year % change, Nominal



Note: Downgrade to retail media forecast in 2024 is due to availability of new 2023 data from previously unmonitored platforms.

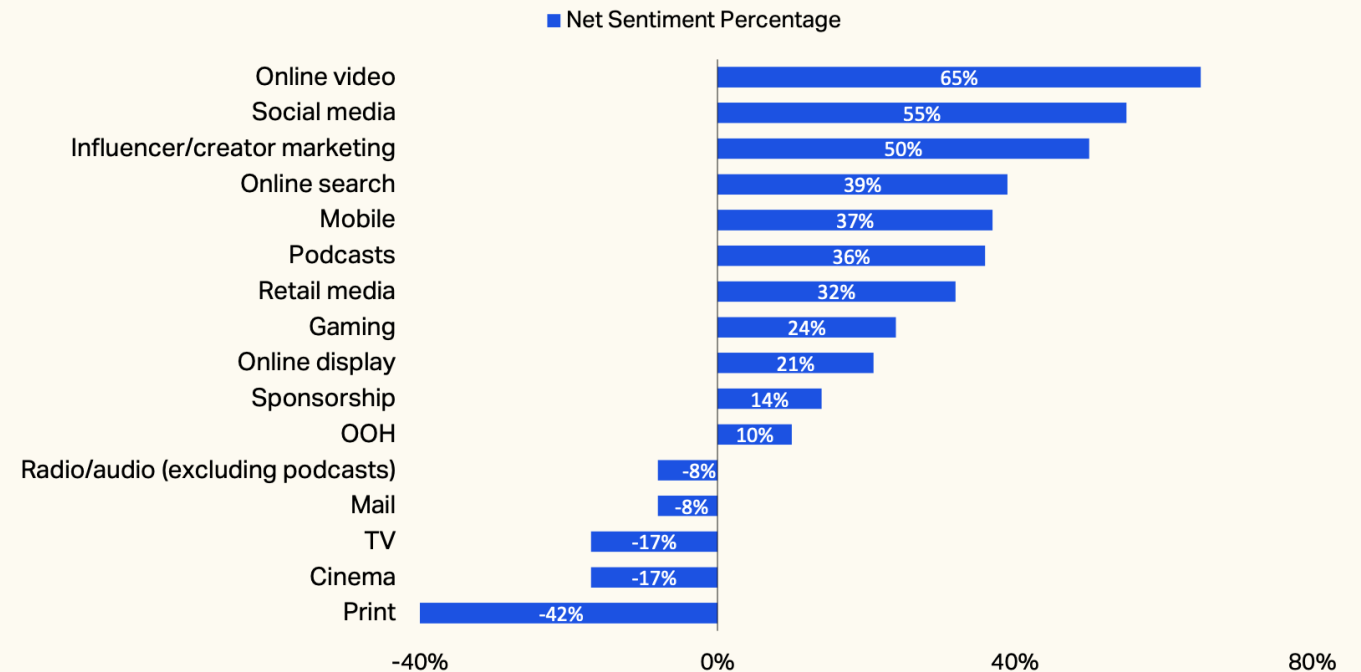
Source: WARC Media. 2024. Global Ad Spend Outlook 2024/25 – Q4 update. Read more on our data and methodology [here](#).

Očekávání
od 2025.
Pokračování
trendu.

The Future of Media 2025

WARC

Q: How do you expect investment in media channels to change in 2025?

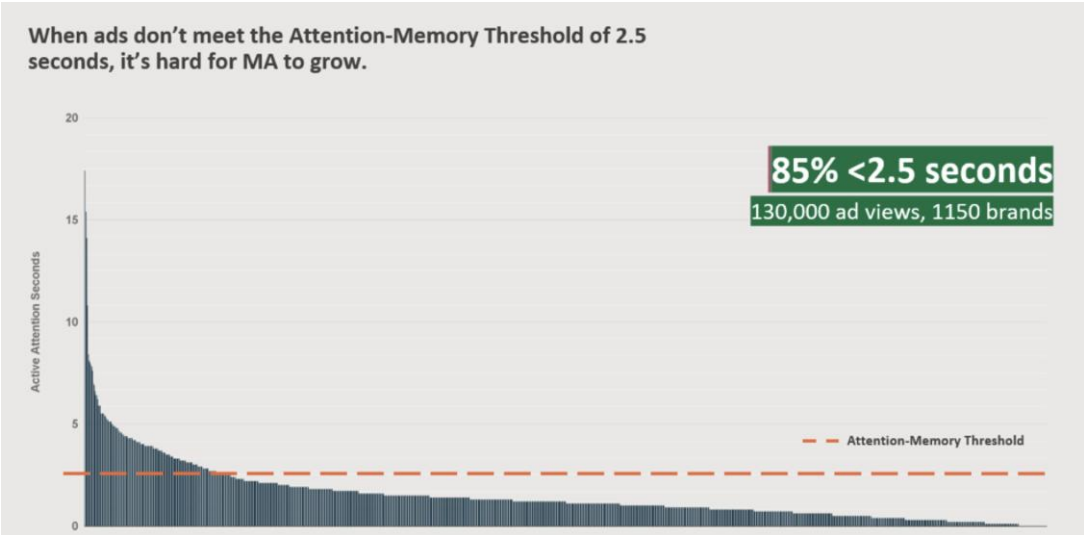
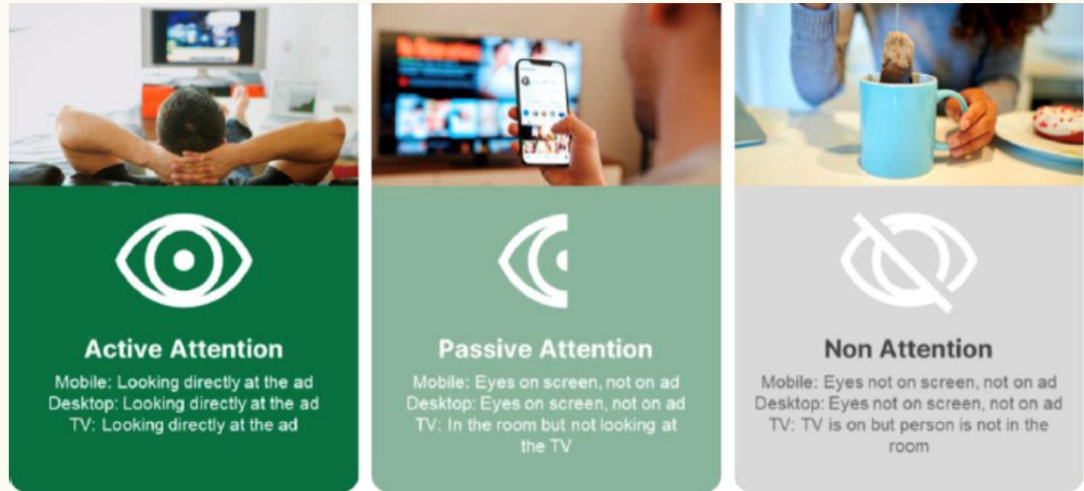
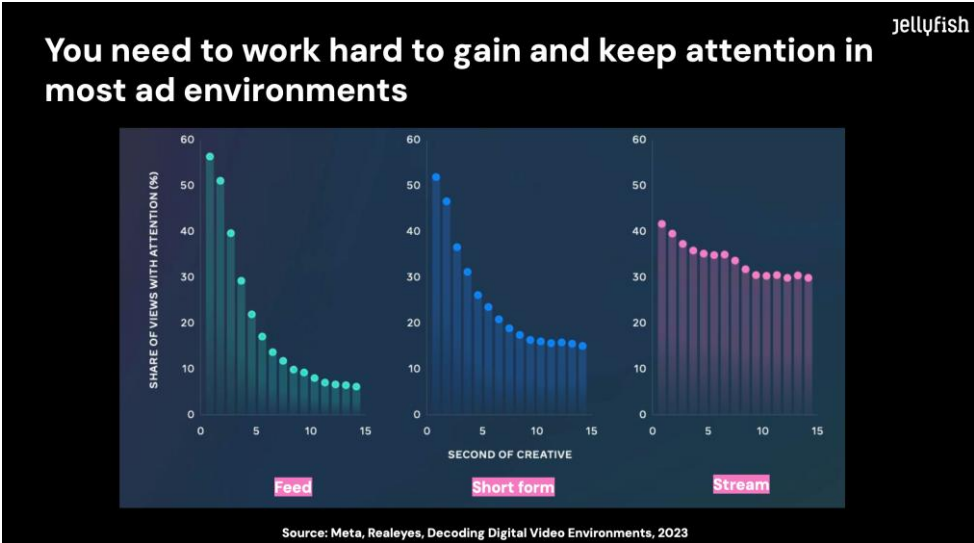


Note: Net Sentiment Percentage equals the percentage of respondents that expect investment to increase minus the percentage of respondents who expect investments to decrease.

Source: WARC. Voice of the Marketer report. 2024.

Když vás nikdo nezaregistruje. Nebo
správně nepřihlásí. Nemůžete růst. Fakt.

Krise pozornosti >>>> Příležitosti jak získat pozornost ve světě přebytku.



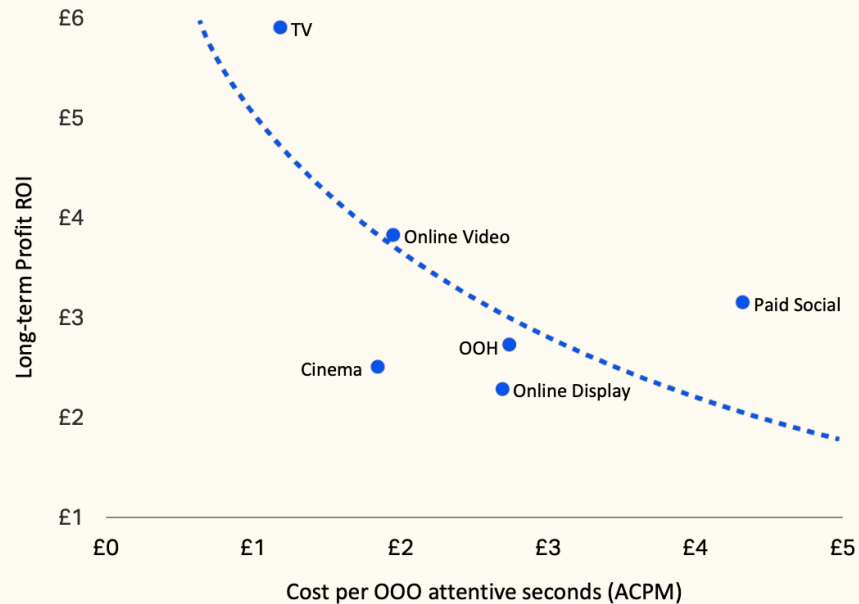
Cena za vteřinu pozornosti ve středu pozornosti

The Future of Media 2025

WARC

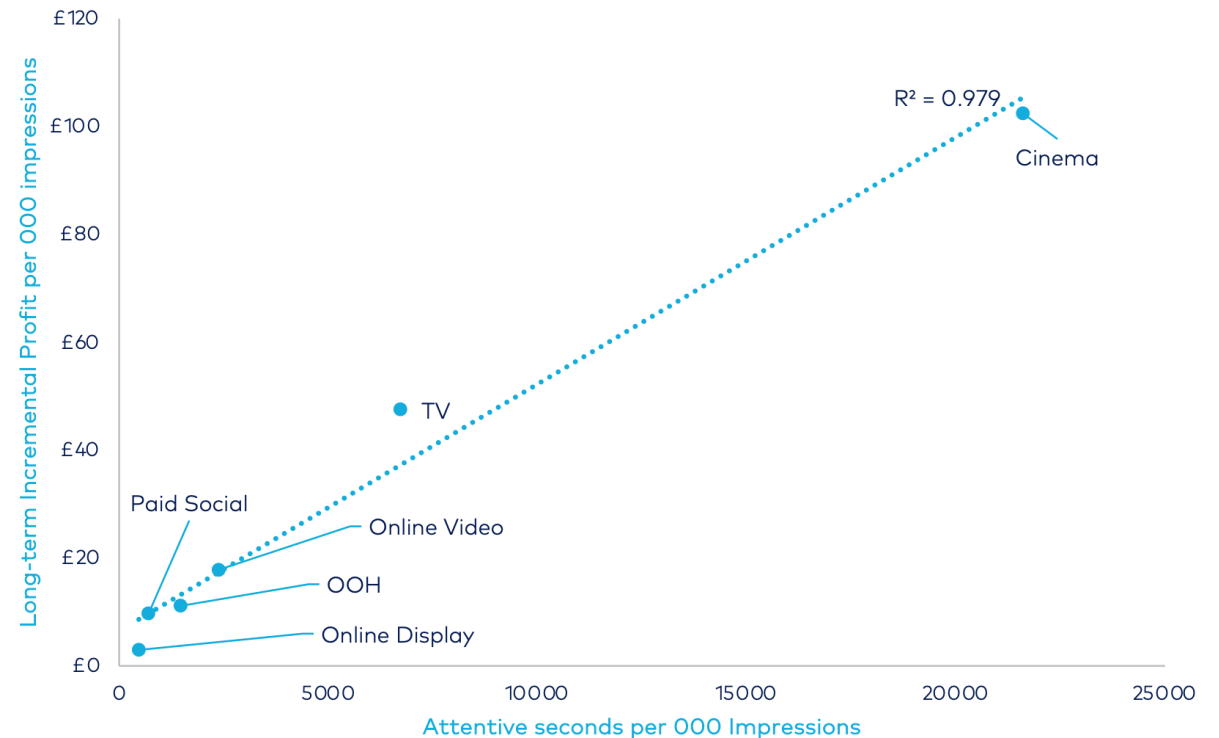
Attention efficiency drives ROI

The cost of attentive seconds varies between media channels, producing an inverse relationship to profit ROI. Some channels deliver attention more cost efficiently than others, and this helps them drive more profit from the budget



Source: Ebiquity, Lumen. Maximising Profit through attention: New insights for Media Leaders. 2024.

Figure 1: Attention and Incremental Profit

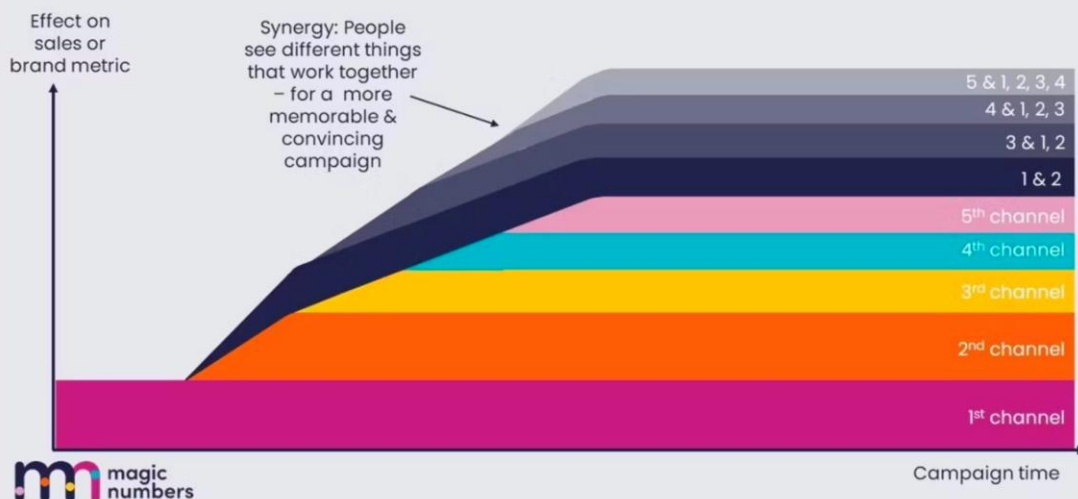


Ryan Rooney
Director Marketing Effectiveness
Ebiquity

David Basset
Founder & Chief Analytics Officer
Lumen Research

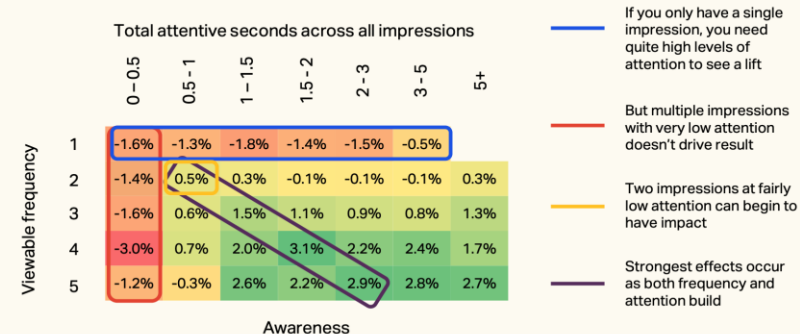
Hodně malých okamžiků se sčítá. Více platforem přináší větší synergický efekt.

The whole is more than the sum of the fragmented parts
because adding more channels to your campaign means getting more synergy



Attention and frequency

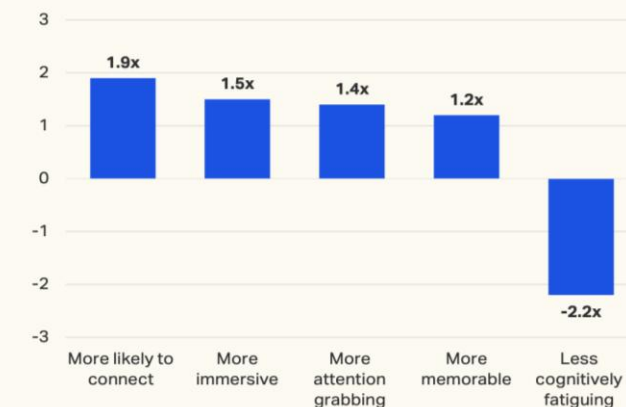
Total attentive seconds versus viewable frequency (display advertising)



Note: % points difference in brand score, relative to all those exposed to the campaign

Source: Brand Metrics, HAVAS Media Network, Lumen. What do 9000 brand lift studies teach us about attention and memory? 2024.

Connected omnichannel campaigns score higher against campaign metrics



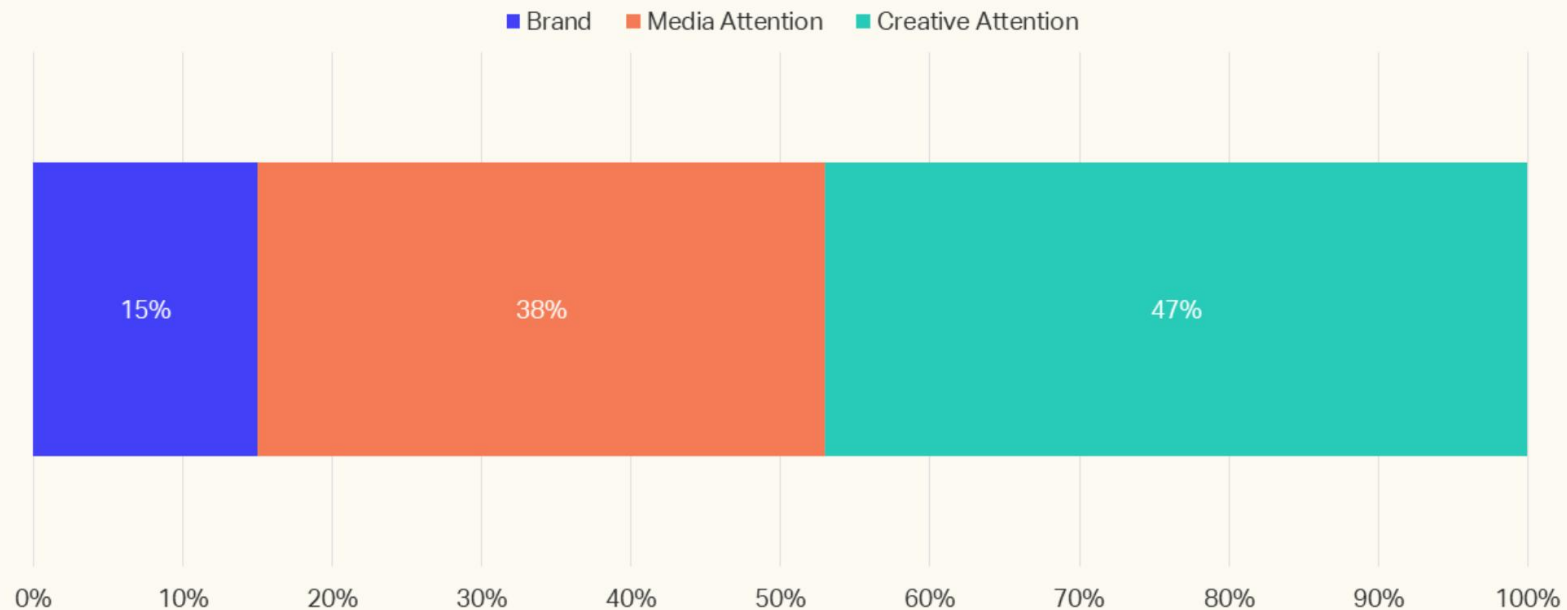
Note: Data from the Trade Desk Intelligence and PA Consulting. The Untapped Opportunity of Omnichannel, October 2024. The study includes quantitative surveys (in the US, UK and Germany), ethnographic media diary (in the US, UK, Germany), and controlled tests (in the US, the UK).

Source: The Trade Desk.

Místo maximalizace zásahu, multikanálové strategie založené na dosažení specifických dopadů na značku, prodej.

Kreativita je nejdůležitější faktor pro pozornost

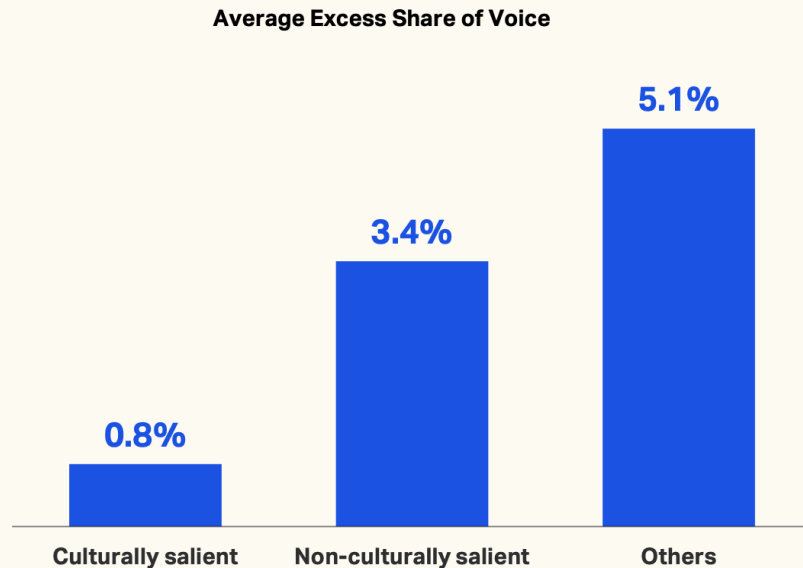
Creative attention significantly drives brand impact WARC Creative Factors contribution to sales outcomes



SOURCE: Using attention metrics to drive effectiveness: Four dimensions brands need to know about, WARC, 2023

Slavné kampaně, vzbuzující emoce. Kulturní relevance

Culturally salient campaigns: Higher impact with lower budgets



Source: The earned effect study: TWSC study with IPA to understand impact of cultural salience on brands and companies.

Figure 59 Fame campaigns amplify emotional strengths

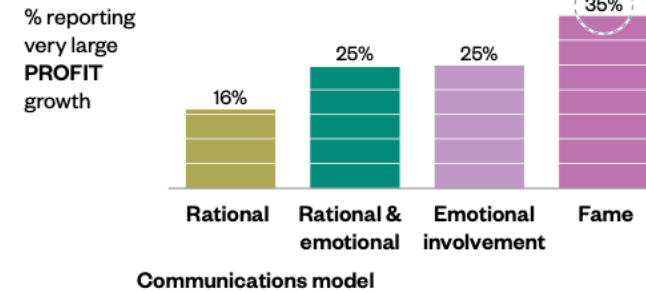
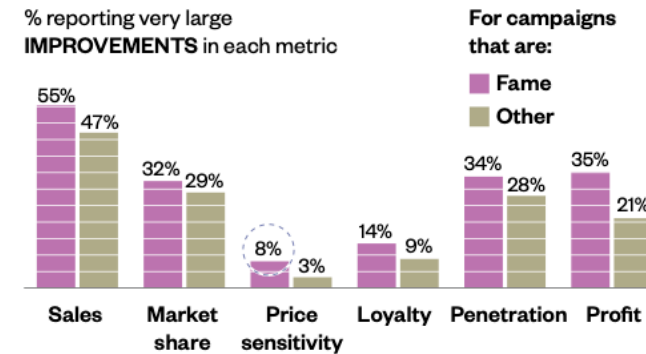


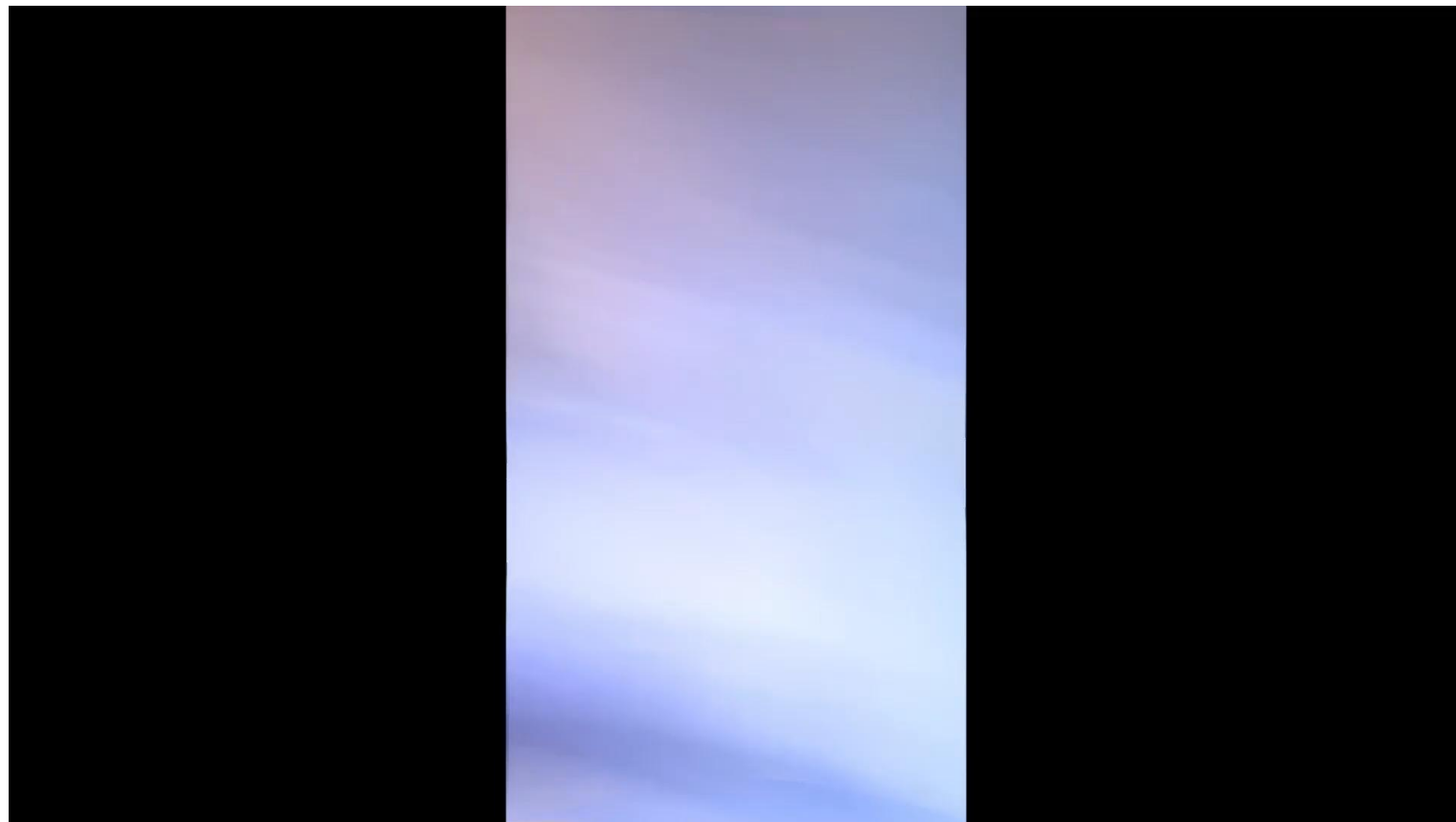
Figure 60 Fame campaigns outperform on all metrics, especially pricing



Spolupráce značek a médií



Jeden příklad
za všechny



Jde to i v ČR

13:MINUT



Česká asociace
pojišťoven

- 702

NEHOD Z RYCHLOSTI OPROTI
PŘEDCHOZÍMU OBDOBÍ

56 % lidí

UVÁDÍ, ŽE MÉNĚ SPĚCHÁ

291 000 000 Kč

UŠETŘENÝCH DÍKY NEHODÁM, KTERÉ SE NESTALY



No.1

NETFLIX SHOW

REKORDNÍ POČET
PŘIHLÁŠEK NA STUDIUM
ADIKTOLOGIE

- 36 %

NEHOD S PŘÍTOMNOSTÍ DROG

6 500 000

POST ENGAGEMENT

2.3mil €

EARNED MEDIA