

**MANAGEMENT STRATEGY DIGITAL  
MSD BY HUBERT KRATIROFF  
2024**

**SEASON 03  
EPISODE 02**

1

52	
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SparcAgency.com

just do it better



49	
----	--

FastnAgency.com

BRIDGING THE GAP TO  
DIGITAL SUCCESS FOR EVERY  
BUSINESS



3

50	
----	--

ChamsPub.com

why not



44	
----	--

SheLeads-Company.com for&by women



2

51	
----	--

HadikLagence.com

strategy that deliver



**FORTUNE** 🌟 @FortuneMagazine · Apr 22  
Tesla guts newly formed **marketing** team despite investors demanding greater focus on ads as EV sales slow. [fortune.com/2024/04/22/tes...](https://fortune.com/2024/04/22/tesla/)



Tesla guts newly formed marketing team despite investors demanding greater f...

From fortune.com

**HT** Hindustan Times 🌟 @htTweets · Apr 23  
#Tesla layoffs | Company fires new **marketing** team months after launching it

[hindustantimes.com/business/tesla...](https://hindustantimes.com/business/tesla...)



**Elon Musk** 🌟 @elonmusk · Apr 20

A promotional advertisement for the Tesla Model Y. It features the Tesla logo at the top, followed by the text "Model Y" and a front-facing view of the car. Below the car, the price "starts at \$29,490" is displayed in large white text, with a smaller line of text below it: "after US federal tax credit &amp; estimated gas savings". The background is dark blue.

Rate proposed Community Notes

19K 31K 366K 90M

Marketing Strategy  
DIGITAL STRATEGY  
Digital Marketing Strategy

STRATEGY?

MARKETING?



« shift from

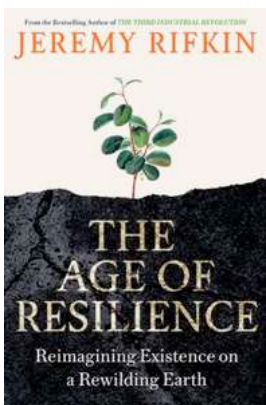
...

growth to flourishing »

Jeremy Rifkin



Pierre Rabhi



sharon-pittaway-unsplash

**КНОЛ**

marketing

**create value**

**for the ecosystem**

**for the client,**

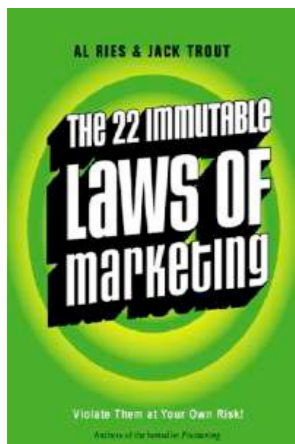
**and the company**



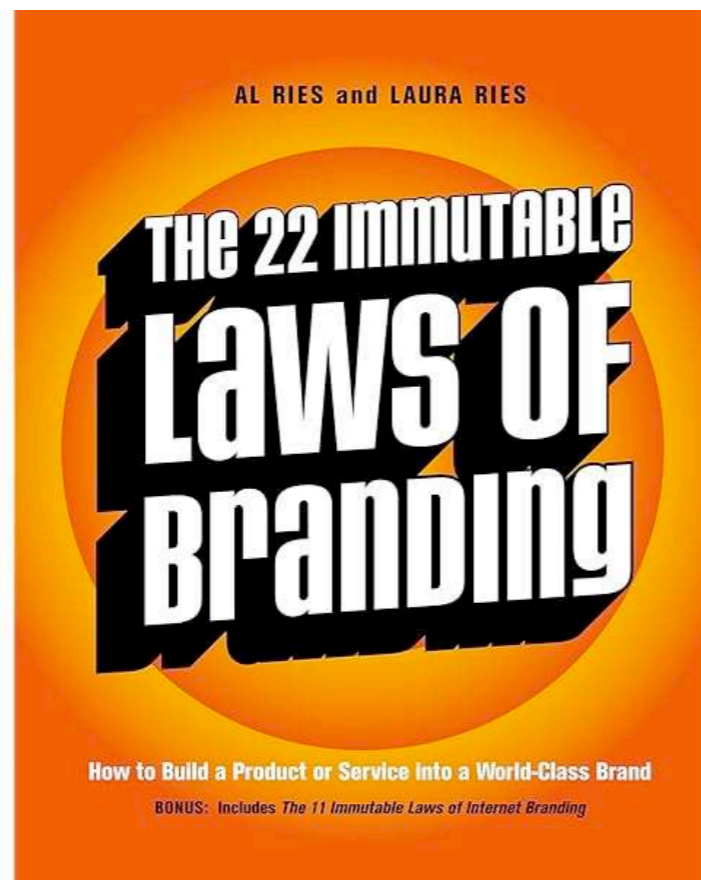




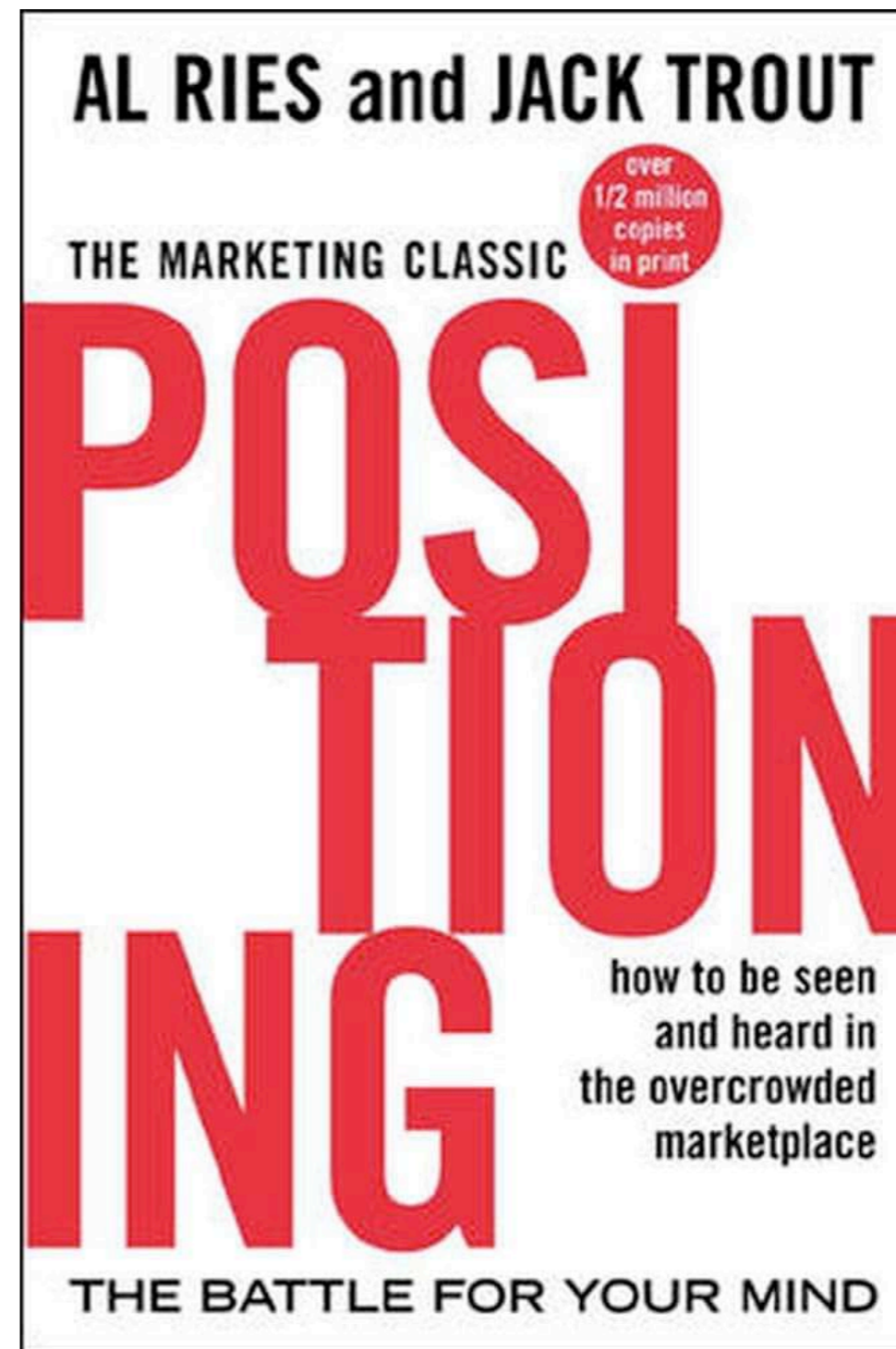
Célèbrissime Ford Model T : à la fois modèle d'innovation et source des maux  
Exceptionnellement en rouge, contrairement à l'aphorisme de Henry \*



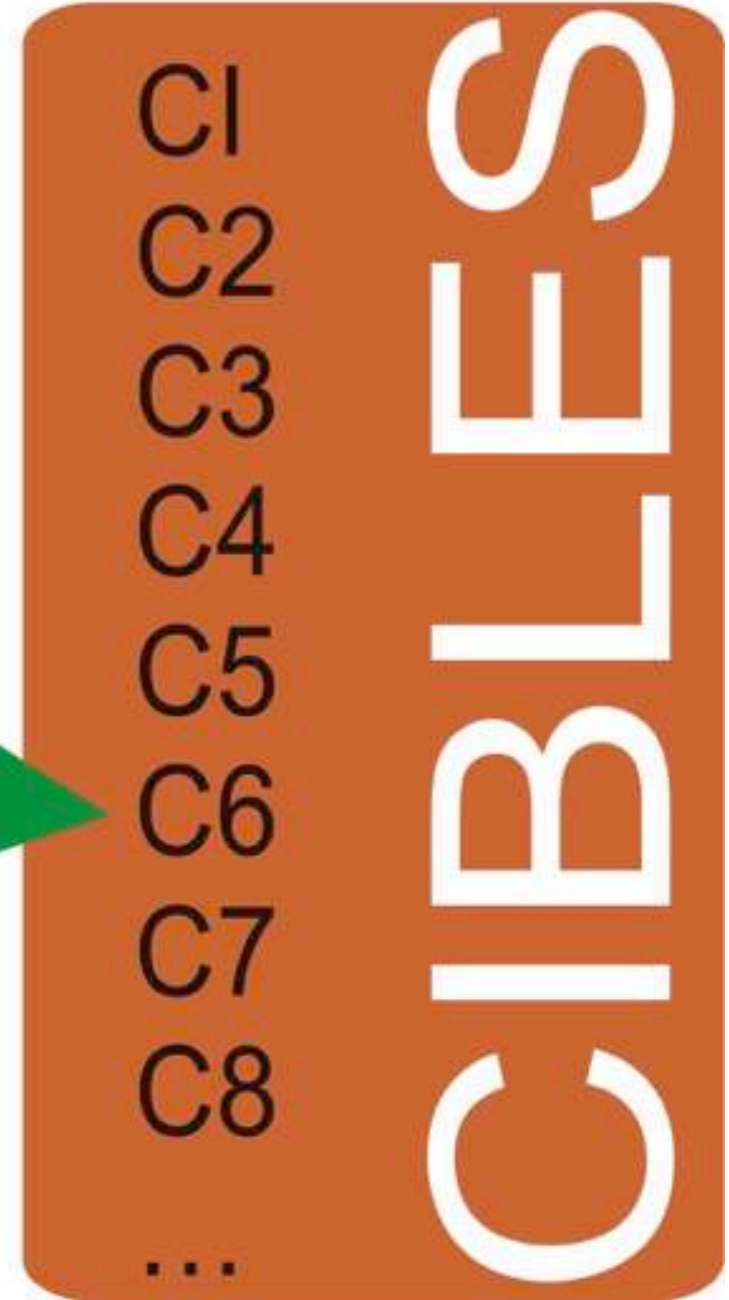
Trout & Ries

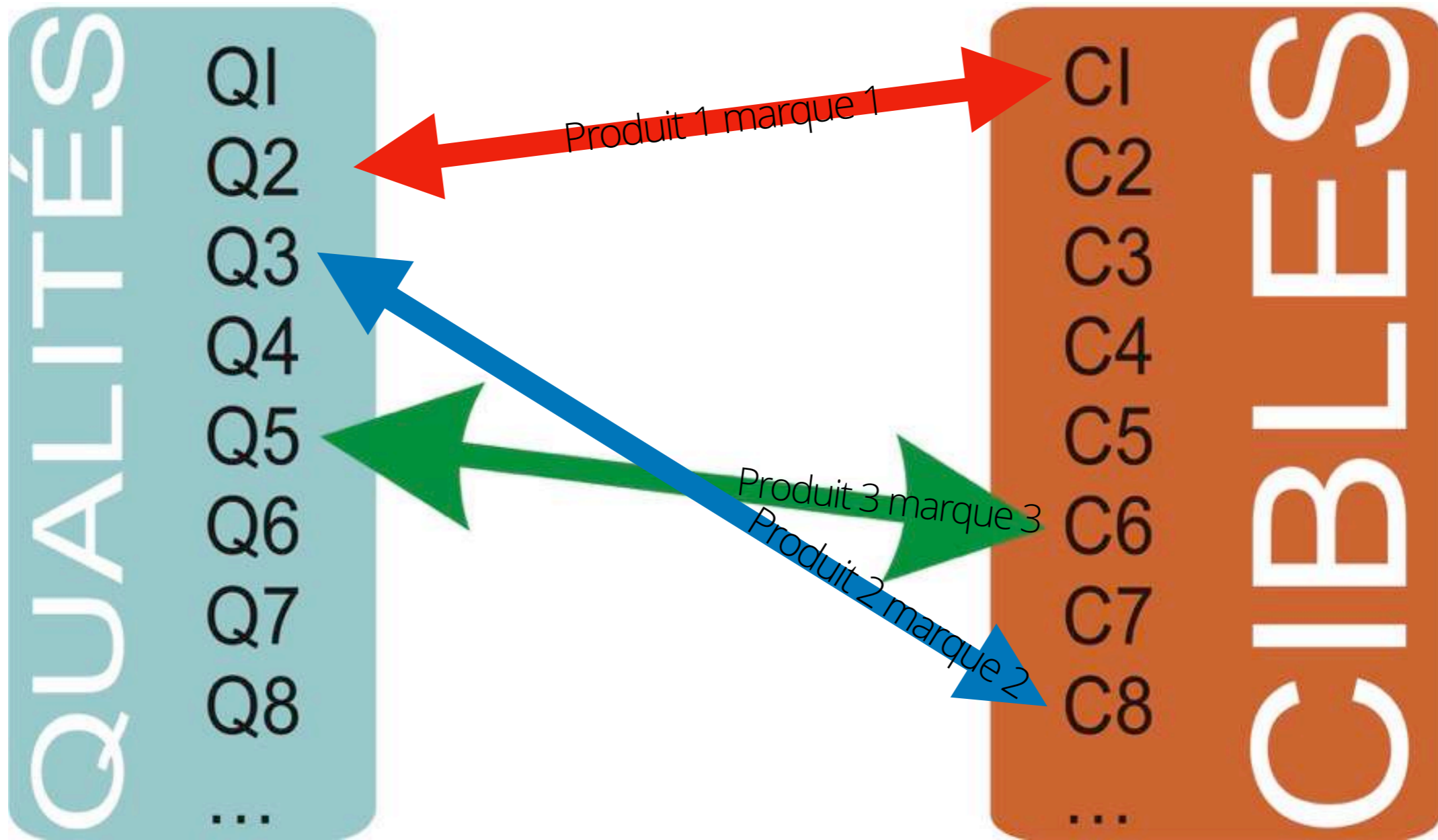


The Battle For Yor Mind



# POSITIONNEMENT BIJECTIF

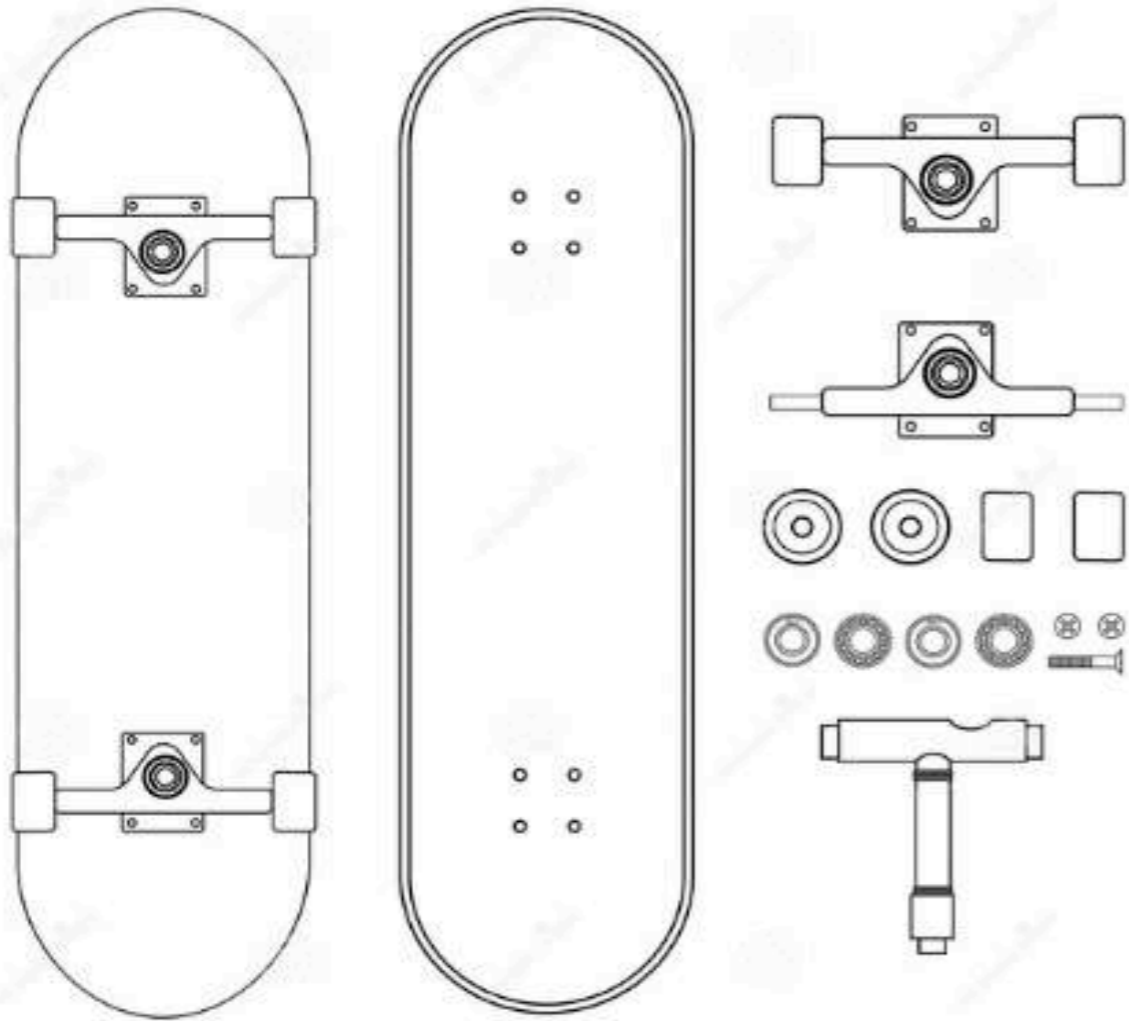




3 produits - 3 marques  
3 propositions de valeur ≠

# Why we buy: Features vs *Jobs*

Even though people buy this...



...they **really** want this



VALEUR RÉELLE



VALEUR PERÇUE



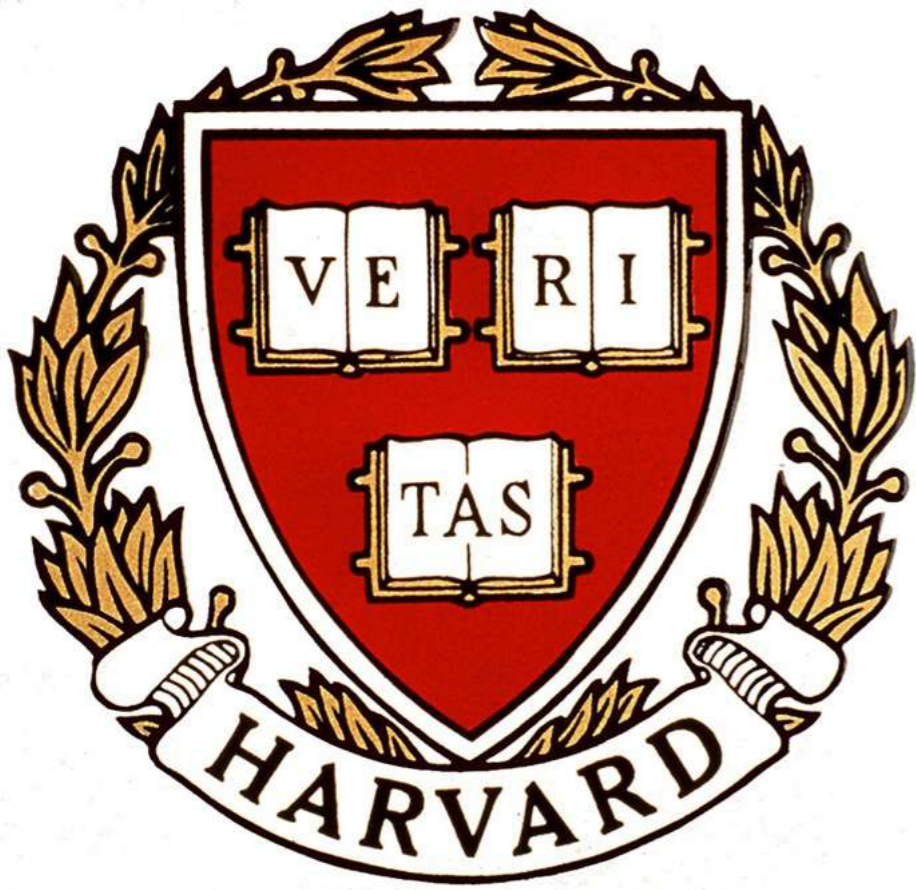
PROBLÈME DE COMMUNICATION



# Méfiez-vous des recettes des années 60

- 4P de Jerome McCarthy (1960)  
Produit - Prix - Promotion - Place
- 5B de Charles Kepner (1955): BON -  
produit prix endroit moment quantité
- SWOT de Humphrey (1970)
- CAP Caractéristique Avantage Preuve  
cognitif / conatif / affectif
- SONCAS / AIDA

WUOL  
COMIC



HBR.ORG

# Harvard Business Review

JULY-AUGUST 2014

96 Strategy  
Four Paths to Business Model Innovation  
Karan Girotra and Serguei Netessine

104 The HBR Interview  
Lenovo CEO Yang Yuanqing on the PC's Future

42 The Big Idea  
The Crisis in Retirement Planning  
Robert C. Merton

THINK FEEL DO

The New Basics of  
**MARKETING**

The image is a cover for the Harvard Business Review magazine, July-August 2014 issue. It features the magazine's title in large, bold, black letters at the top. Below the title is a Venn diagram with three overlapping circles: a red circle on the left with a lightbulb icon and the word 'THINK', a blue circle in the middle with a heart icon and the word 'FEEL', and a yellow circle on the right with a mouse cursor icon and the word 'DO'. Below the Venn diagram, the text 'The New Basics of' is written in a smaller font, followed by the word 'MARKETING' in a very large, bold, black font. In the top right corner, there is a small Harvard Business Review logo and the text 'JULY-AUGUST 2014'. Below that, there are three article teasers, each with a page number, a title, and the author's name.



~~SWOT~~

WUJCA

~~SWOT~~

Volatilité

Incertitude

Complexité

Ambiguïté



# M3 Modern Marketing Model

1. Strategy
2. Market Orientation
3. Customer insight
4. Brand & Value
5. Segmentation Persona
6. Positioning
7. UX / CX & content
8. Distribution
9. Promotion
10. Data & Measurement



*Strategy  
is a  
plan  
to create value*

*value for company*  
*value for customers*  
*value for employees*  
*value for suppliers*  
*value for government*  
*value for earth*

**“Nobody really knows  
what strategy is.”**

*The Economist*





McKinsey & Company



*ATKEARNEY*



Kurt Salmon 



*MARS & CO*  
*an international strategy consulting firm*

**Roland Berger**  
Strategy Consultants

# BCG



# Bain's 5 Beliefs on Strategy



LEADERSHIP



COMPETITIVE  
ADVANTAGE



FOCUS



ADAPTABILITY



FOUNDER'S  
MENTALITY

**art  
of reaching  
an  
OBJECTIVE**

**Plan**

**providing**

**all the means**

**to achieve**

**an objective**

**PLAN =**

**3 phases**

**3 stages**

**3 steps**

**3 parties**

**Preparation**

**Conquest**

**Consolidation**

The image features three tall, fluted stone pillars of varying heights, set against a clear, bright blue sky. The pillars are arranged in a receding line from left to right. The text 'DIGITAL PILLARS' is overlaid in a large, bold, black font with a white outline, centered across the middle of the image.

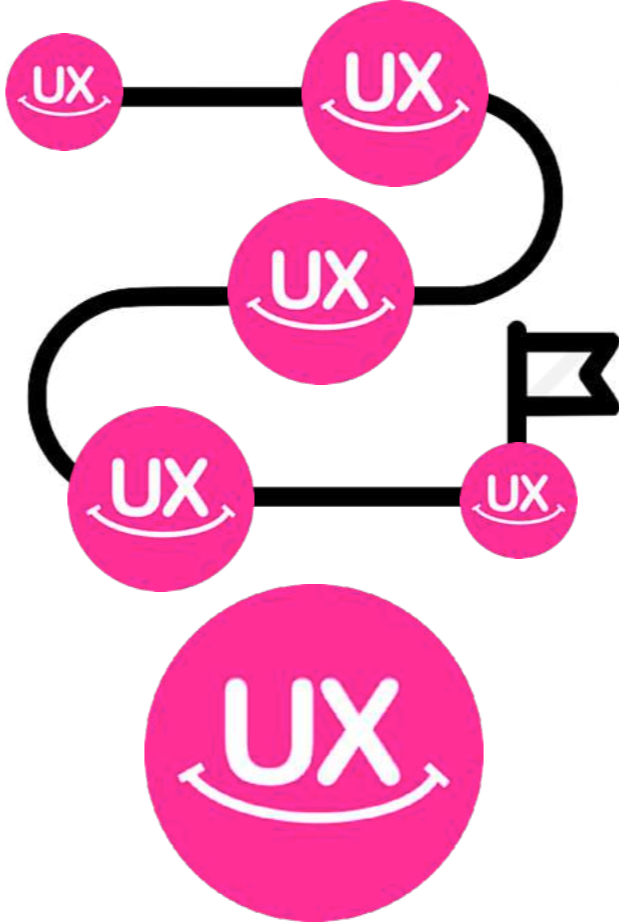
# DIGITAL PILLARS



# 1



# 2



# 3

0110  
1001  
1010



customer obsession

user centric

USER NEEDS

pain point / problems

target / segmentation

GEN BXYZ $\alpha$

use case



parcours / UX

Journey

touchpoint

ADs / SAV

phone

conversation

seamless

frictionless

flawless

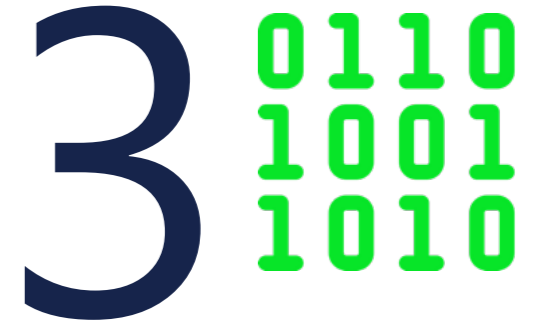
différentiation

offre

pain killer

candy

vitamine



DATA

IOT

Connexion 4G

WiFi

BLE

capteur IIOT IOT

tacking, tracing

IOB

NPS

MCA

IA

ML

DataLake

5V

D

E

F

digital marketing

Use of screens

(web, mobile, networks,

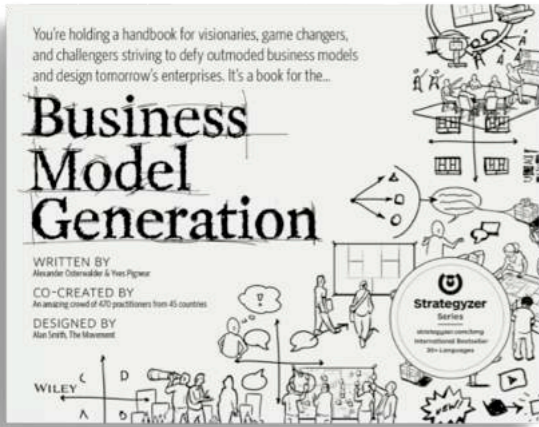
DOOH, metavers)

and data to bring greater

personalization and

satisfaction to users and

customers

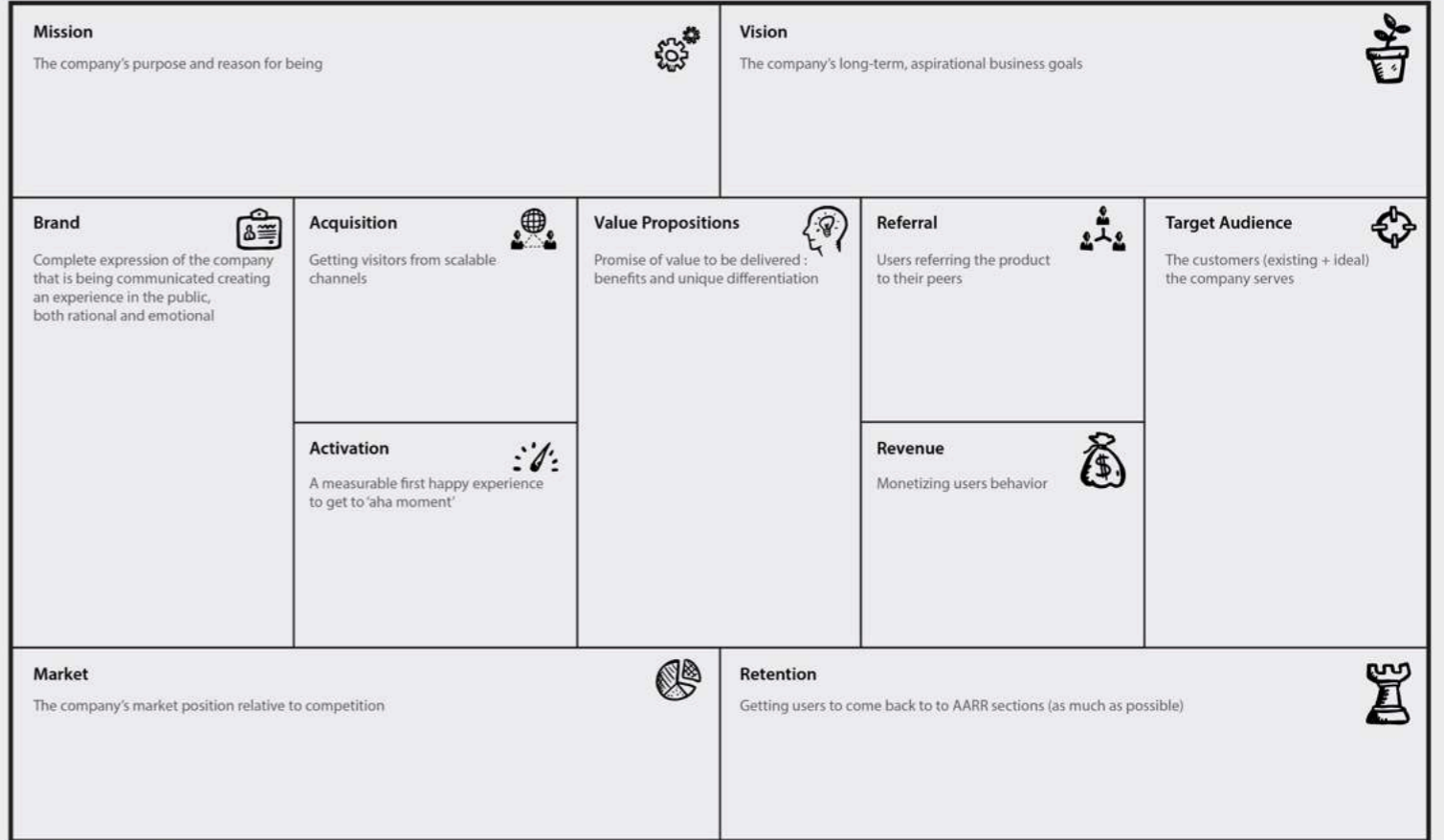


## The Digital Marketing Canvas

Develop a strategy to accelerate business growth

Designed for:

Date:



Designed by: Jeremy Corman

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[www.digitalmarketingcanvas.com](http://www.digitalmarketingcanvas.com)

# The Digital Marketing Canvas

Develop a strategy to accelerate business growth

Designed for:

Date:

## Mission

The company's purpose and reason for being



## Vision

The company's long-term, aspirational business goals



## Brand

Complete expression of the company that is being communicated creating an experience in the public, both rational and emotional



## Acquisition

Getting visitors from scalable channels



## Value Propositions

Promise of value to be delivered : benefits and unique differentiation



## Referral

Users referring the product to their peers



## Target Audience

The customers (existing + ideal) the company serves



## Activation

A measurable first happy experience to get to 'aha moment'



## Revenue

Monetizing users behavior



## Market

The company's market position relative to competition

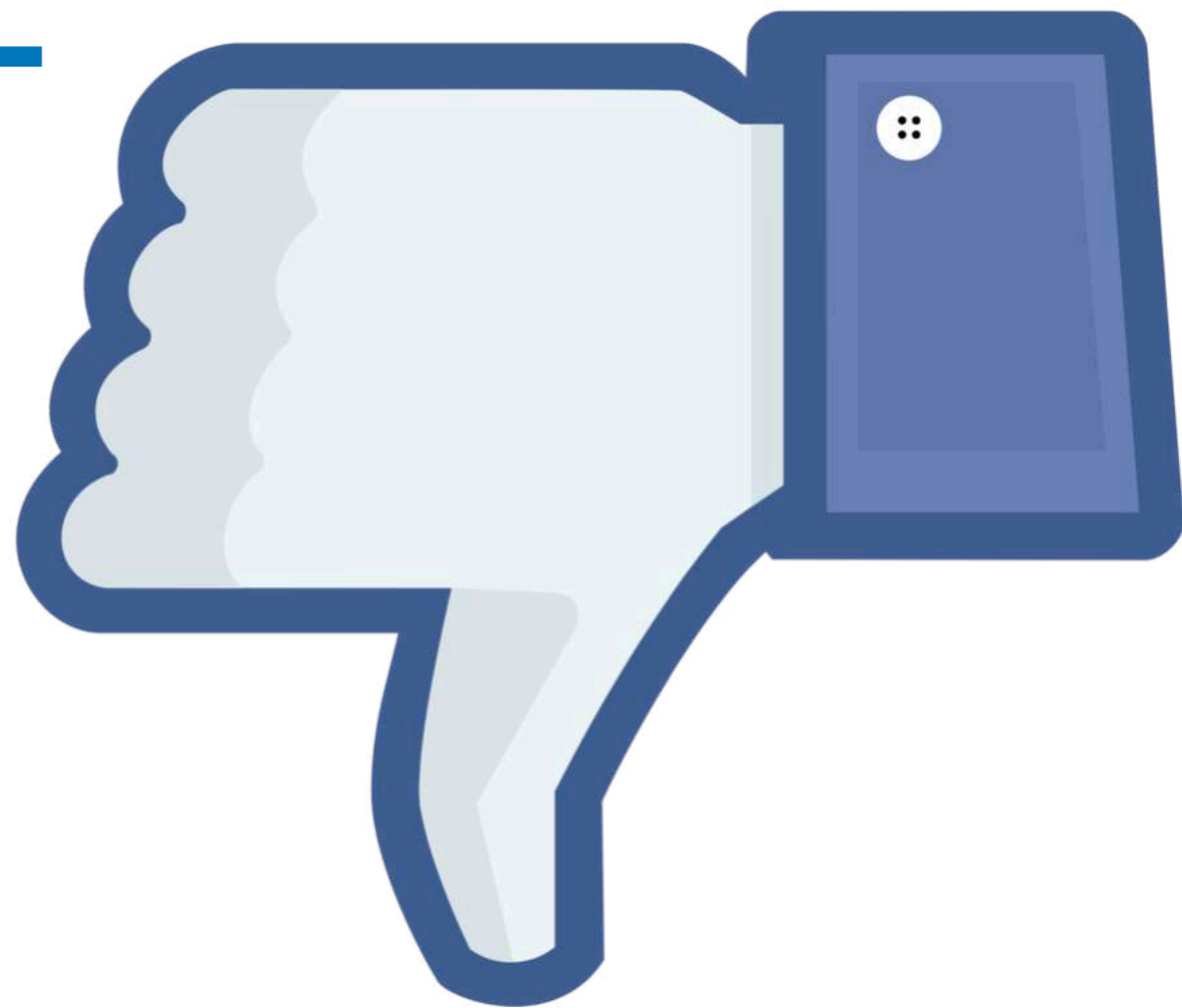


## Retention

Getting users to come back to to AARR sections (as much as possible)



INTERNET  
DIGITAL



# TECH

*invention, technology, research, technical, scientific, code, patent, techno secret...*

# Digital

innovation, touch, usage, assistance, clic commande, IHM (HCI), relation homme-machine...

# Cyber

*cybernetic, security, protection, hacker, virus, espionnage, military, DOD, phishing, ransomware, PFH*





**TECH**

**Digital**

**Cyber**

entreprise **1**



entreprise **2**



Where is your company?

Numérique  
Digital  
Cyber

1



LE BUREAU  
DES  
LEGENDES

2



LE BUREAU  
DES  
LEGENDES

3



LE BUREAU  
DES  
LEGENDES

# Something missing

Numérique  
Digital  
Cyber

1



LE BUREAU  
DES  
LEGENDES

2



LE BUREAU  
DES  
LEGENDES

3



LE BUREAU  
DES  
LEGENDES

**TECH**  
**Digital**  
**Cybernetic**  
**Ethics**

=

**DATA**  
contrôle

=

**INDIVIDUEL**  
personnalisation

=

**Politique**  
moral

entreprise **1**

entreprise **2**

**Inventions**

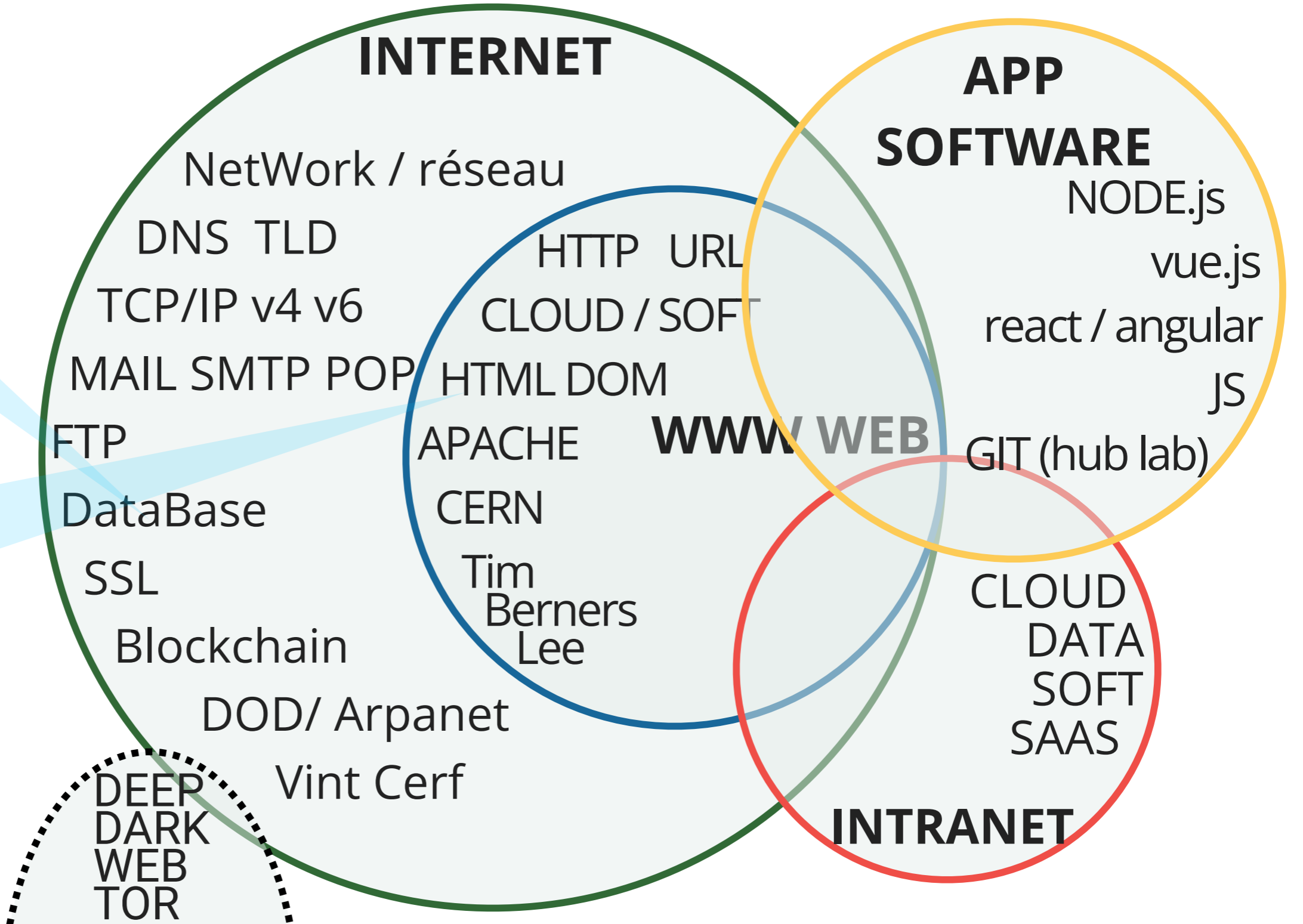
**Innovations**

**Progrès**



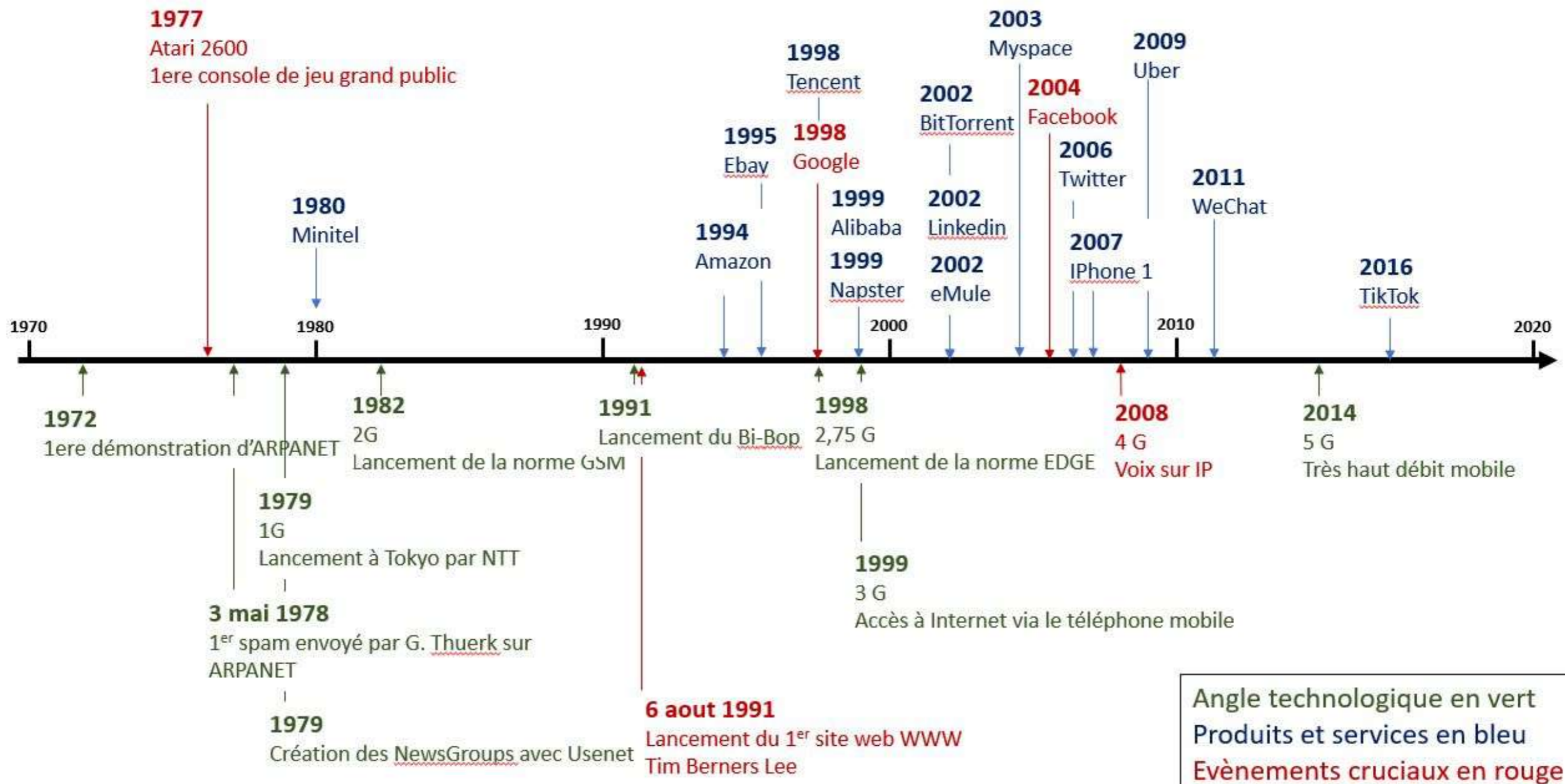
SQL / Postgres  
Oracle  
select  
from  
where  
group  
having  
order

<html>  
<head>  
<body>  
css  
.js



DEEP  
DARK  
WEB  
TOR

**Frise chronologique**  
**Pénétration du digital dans nos vies**



Angle technologique en vert  
 Produits et services en bleu  
 Evènements cruciaux en rouge

4<sup>ème</sup> industrial revolution

STEAM + ICE ENGINE

Electricity

NICT (New Information Communication Technologies)

NBIC



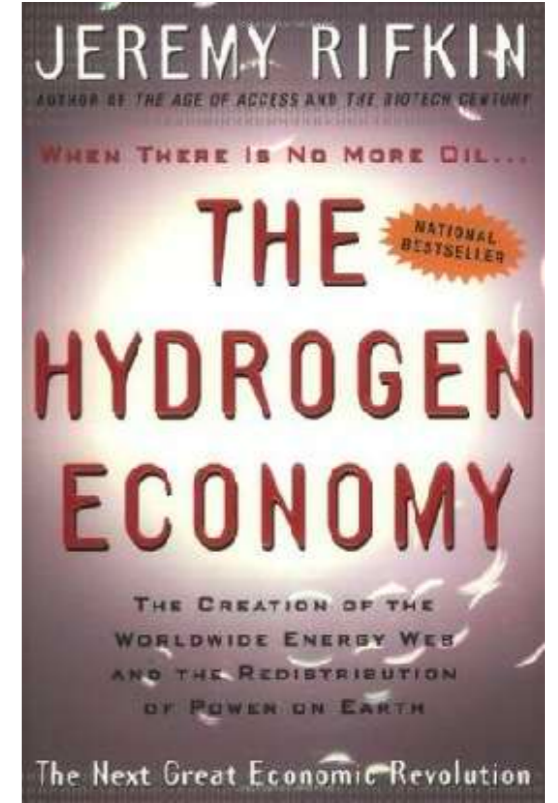
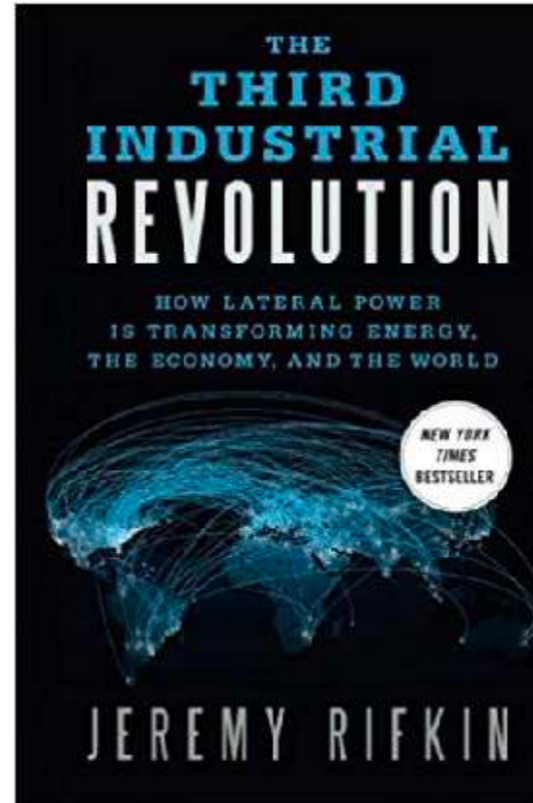
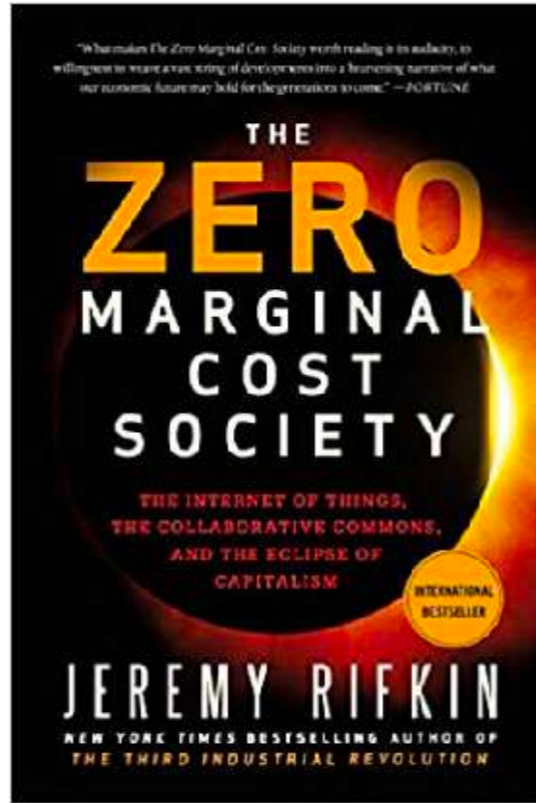


# THE GREEN NEW DEAL

WHY THE FOSSIL FUEL CIVILIZATION  
WILL COLLAPSE BY 2028,  
and THE BOLD ECONOMIC PLAN  
TO SAVE LIFE ON EARTH

**JEREMY RIFKIN**

NEW YORK TIMES BESTSELLING AUTHOR OF  
THE THIRD INDUSTRIAL REVOLUTION



3<sup>ème</sup> industrial revolution

STEAM + ICE ENGINE

Electricity

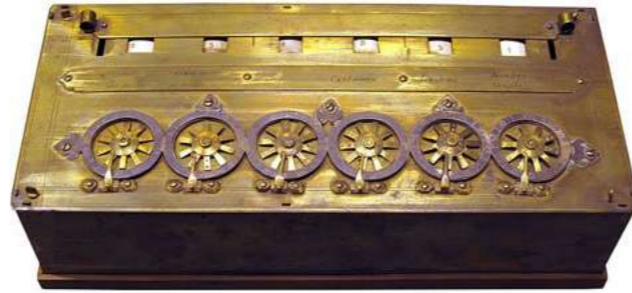
NBIC



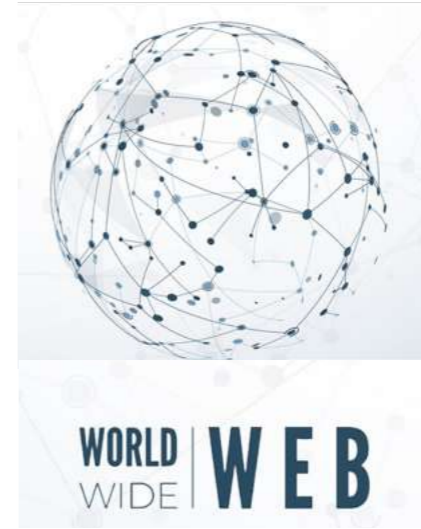
Code of Hammurabi  
is a Babylonian legal  
1750 BCE



Pascal's calculator is  
invented by Blaise Pascal  
in 1642



1989



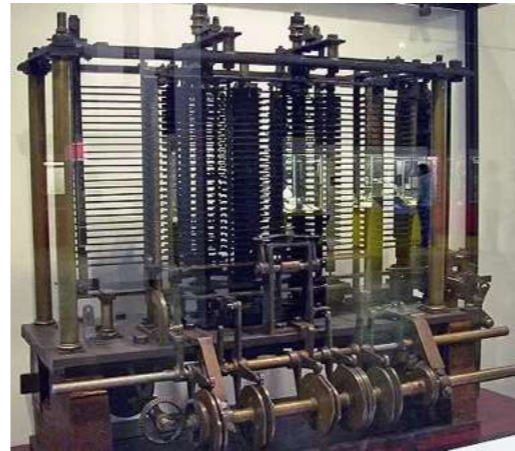
WORLD WIDE WEB



Sumerian cuneiform  
tablet from Uruk,  
Mesopotamia, 3000  
BCE



1455



# Michel SERRES

-3000 Writing  
1450 Printing  
2000 NBIC

# Luc FERRY

1800 STERAM  
1900 Electricity  
2000 NBIC



**GRENOBLE  
ECOLE DE  
MANAGEMENT**  
TECHNOLOGY & INNOVATION



*Preface*

ZERO TO ONE

EVERY MOMENT IN BUSINESS happens only once. The next Bill Gates will not build an operating system. The next Larry Page or Sergey Brin won't make a search engine. And the next Mark Zuckerberg won't create a social network. If you are copying these guys, you aren't learning from them.

Of course, it's easier to copy a model than to make something new. Doing what we already know how to do takes the world from 1 to  $n$ , adding more of something familiar. But every time we create something new, we go from 0 to 1. The act of creation is singular, as is the moment of creation, and the result is something fresh and strange.

THE INTERNATIONAL BESTSELLER

ZERO

TO

ONE

NOTES ON STARTUPS,

OR

HOW TO BUILD THE FUTURE

PETER THIEL

WITH BLAKE MASTERS

'That rare thing: a concise, thought-provoking book on entrepreneurship' THE TIMES

2012-2014

Peter Thiel

PayPal

FB, spaceX, LinkedIn

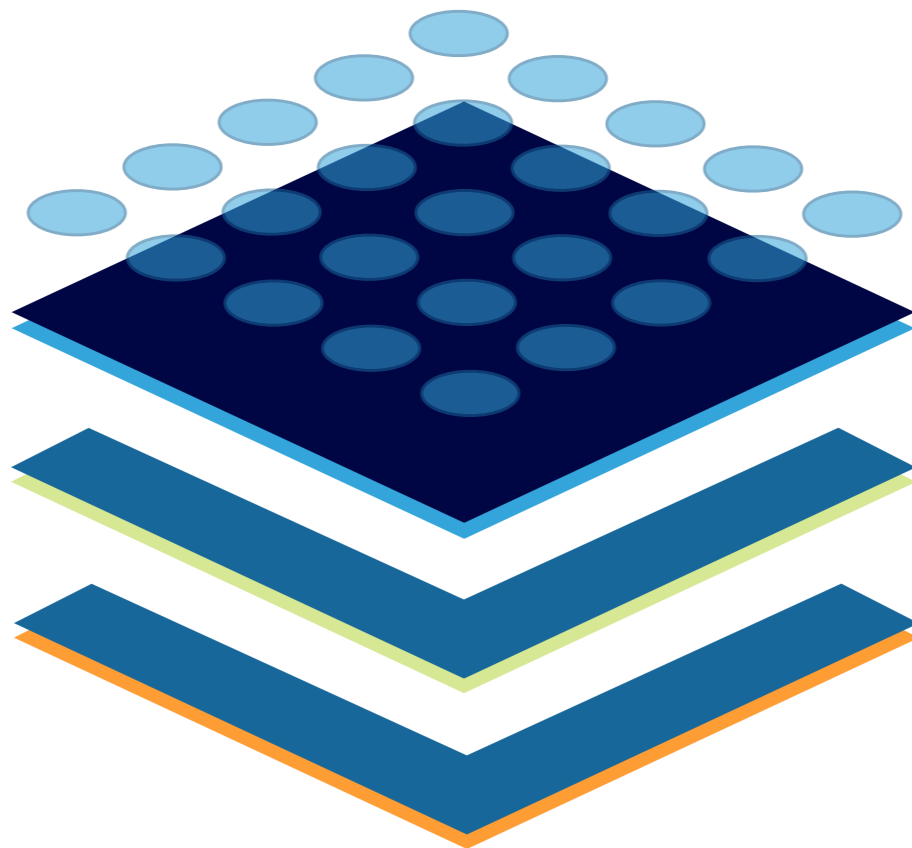
# Les **3** étapes de toute Innovation / rupture / revolution

**1** Ridicule

**2** Impossible / dangerous

**3** Normal / simple

Thiel / Aberkane



**PLATFORM**

**servicisation**  
**disruption**  
**uberisation**  
**tycoonisation**  
**platformisation**

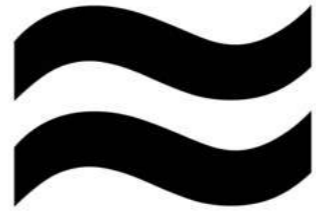
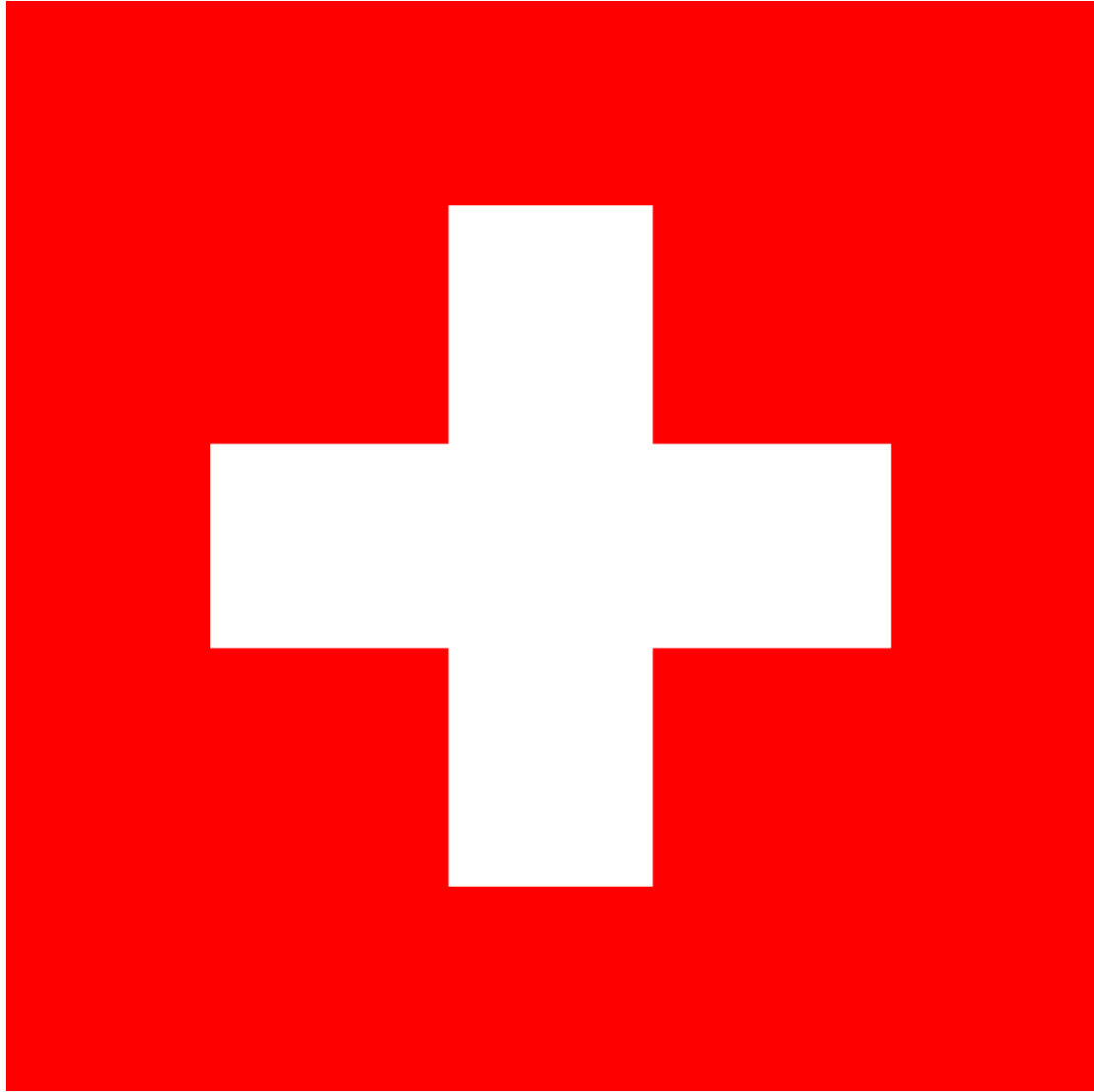


**NEW**  
**Business**  
**Models**



ROLEX





NOKIA

**Polaroid**



#OLDWORLD





PREMIUM



# STARLINK PREMIUM



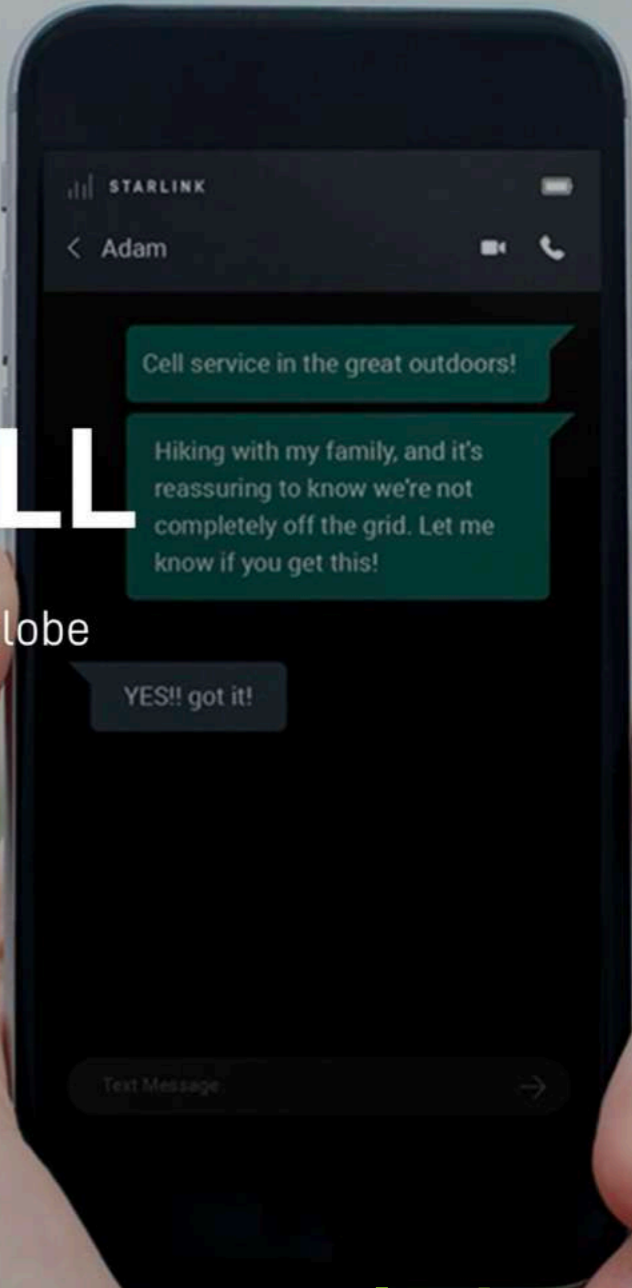
SWARM

**THANK YOU FOR YOUR INTEREST IN ORDERING STARLINK!**

Starlink Premium is not yet available in your area. Please check back for future availability in your area.

# STARLINK DIRECT TO CELL

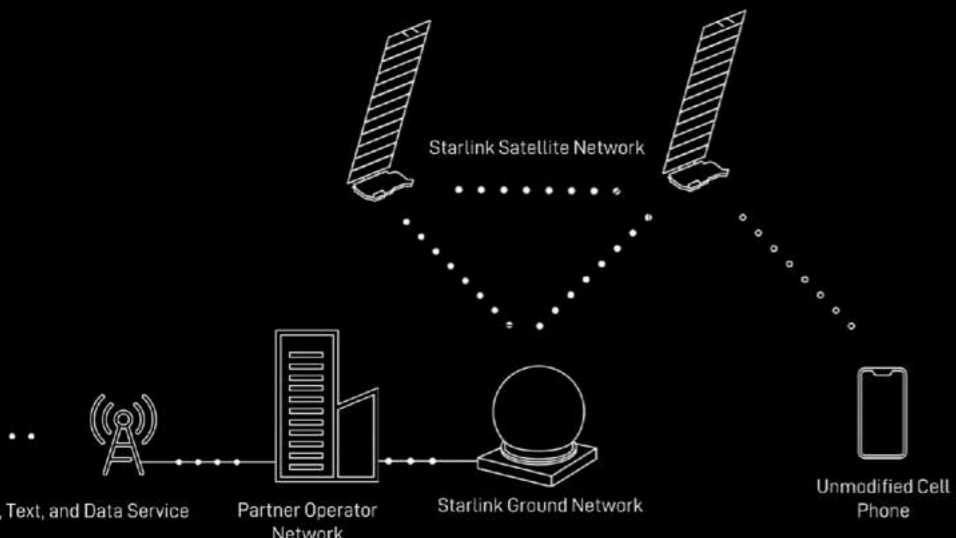
Seamless access to text, voice, and data for LTE phones across the globe



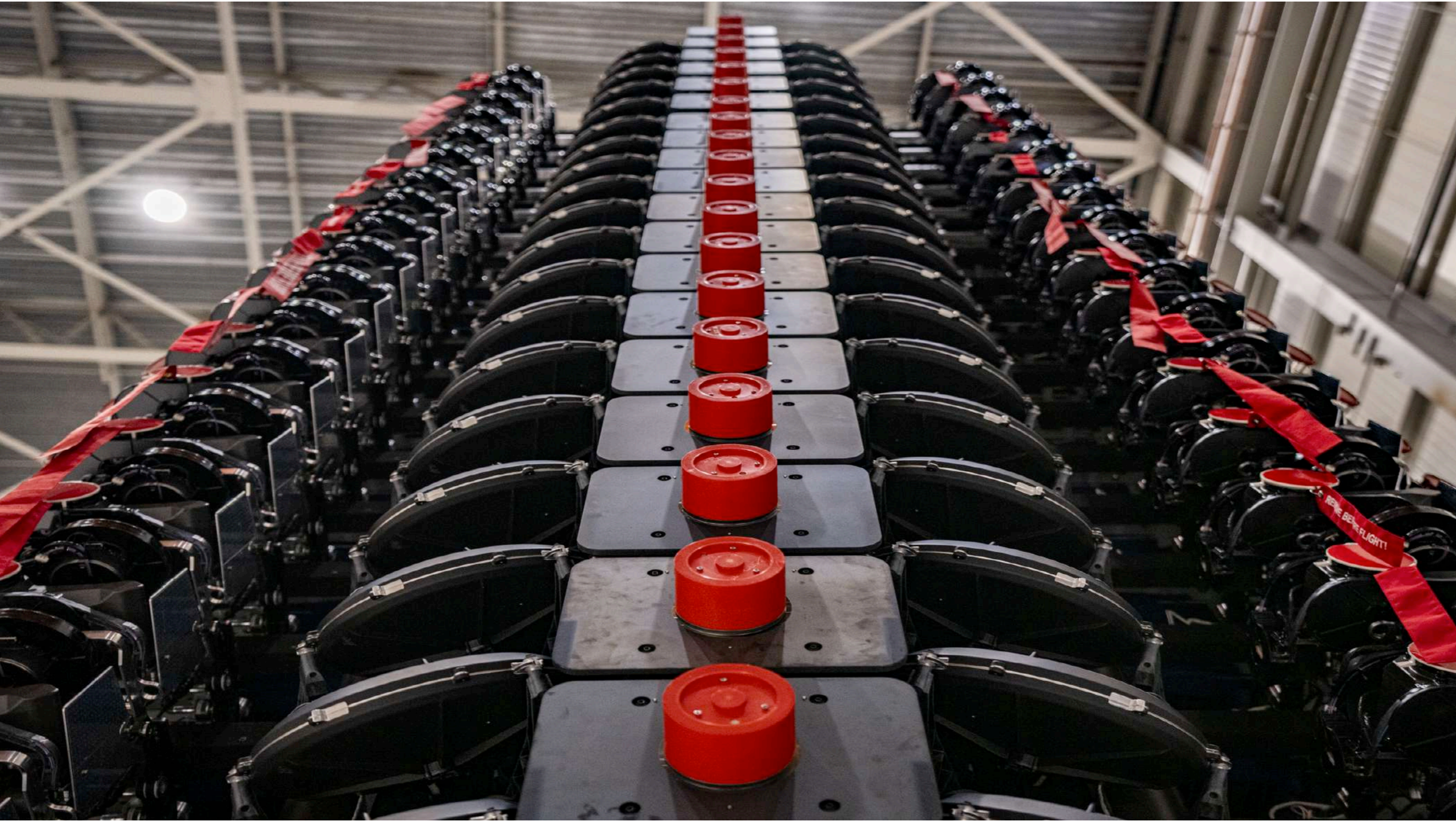
GET IN TOUCH

# SWARM

## A CELLPHONE TOWER IN SPACE



<https://direct.starlink.com/>







PREMIUM



# STARLINK PREMIUM

# Direct 2 Cell



# SWÄRM

OS 4 IOT

**THANK YOU FOR YOUR INTEREST IN ORDERING STARLINK!**

Starlink Premium is not yet available in your area. Please check back for future availability in your area.

# GLOBAL PARTNERS

Cellular providers using Direct to Cell have access to reciprocal global access in all partner nations.

[T-MOBILE \(USA\) >](#)

[OPTUS \(AUSTRALIA\) >](#)

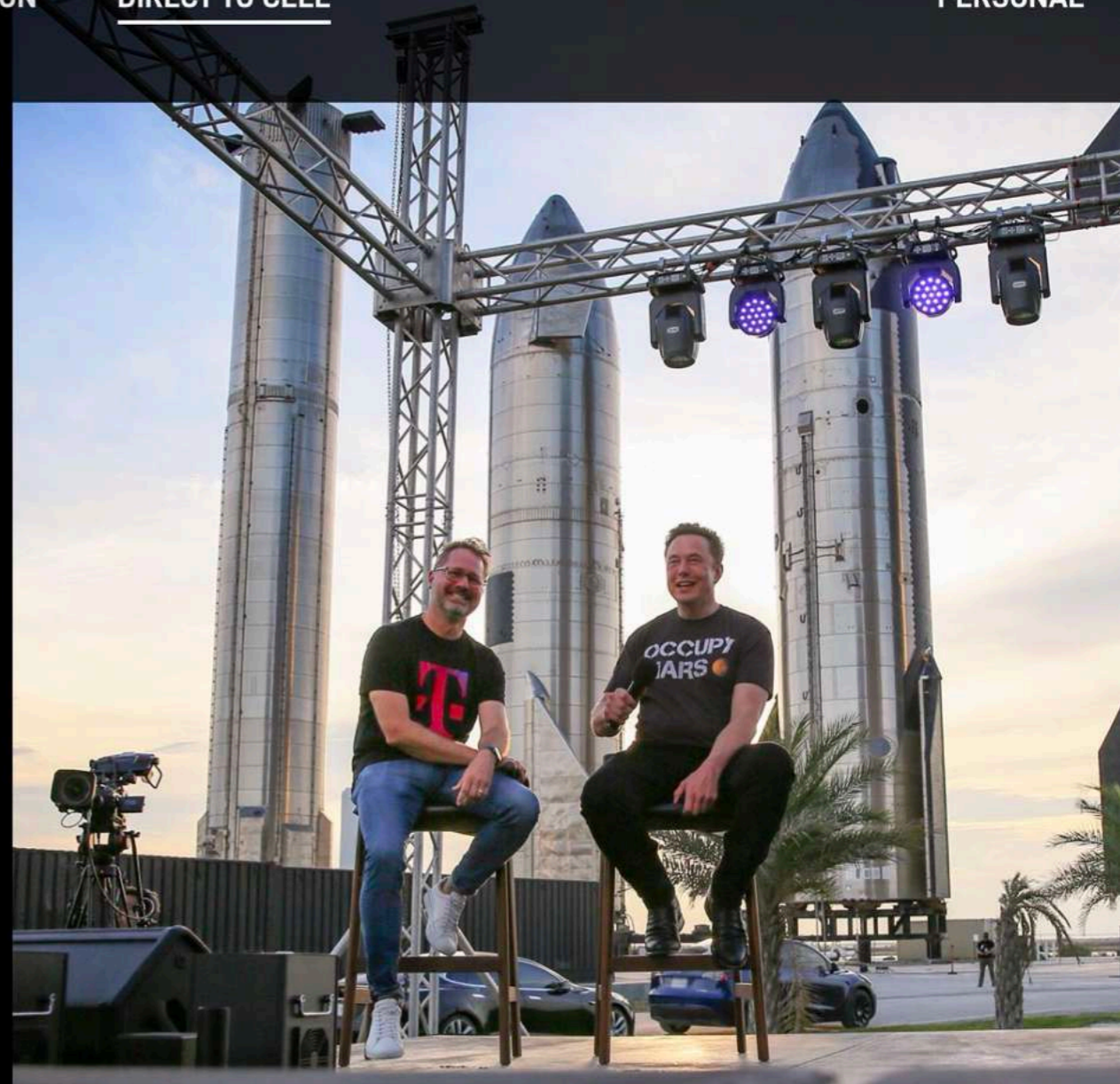
[ROGERS \(CANADA\) >](#)

[ONE NZ \(NEW ZEALAND\) >](#)

[KDDI \(JAPAN\) >](#)

[SALT \(SWITZERLAND\) >](#)

[ENTEL \(CHILE\) >](#)





amazon pharmacy

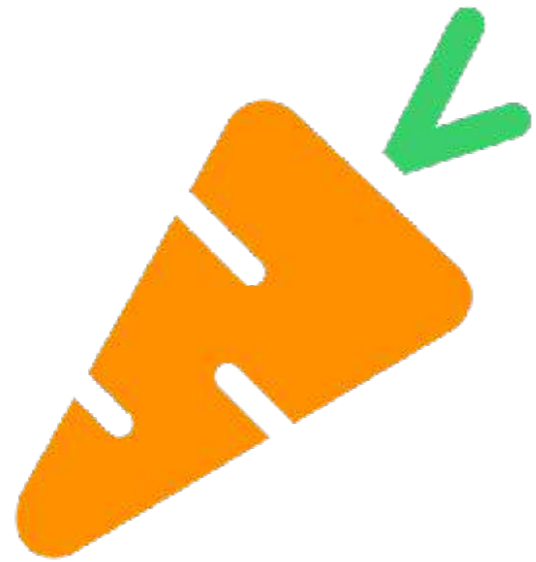
Prefer your meds  
in bottles?



 **PillPack**  
by amazon pharmacy

Prefer your meds  
in packets?





*Yuka*



# Take a selfie, know your healthie!™

Anura's intended use is to increase people's awareness of their general wellness

Read our publications



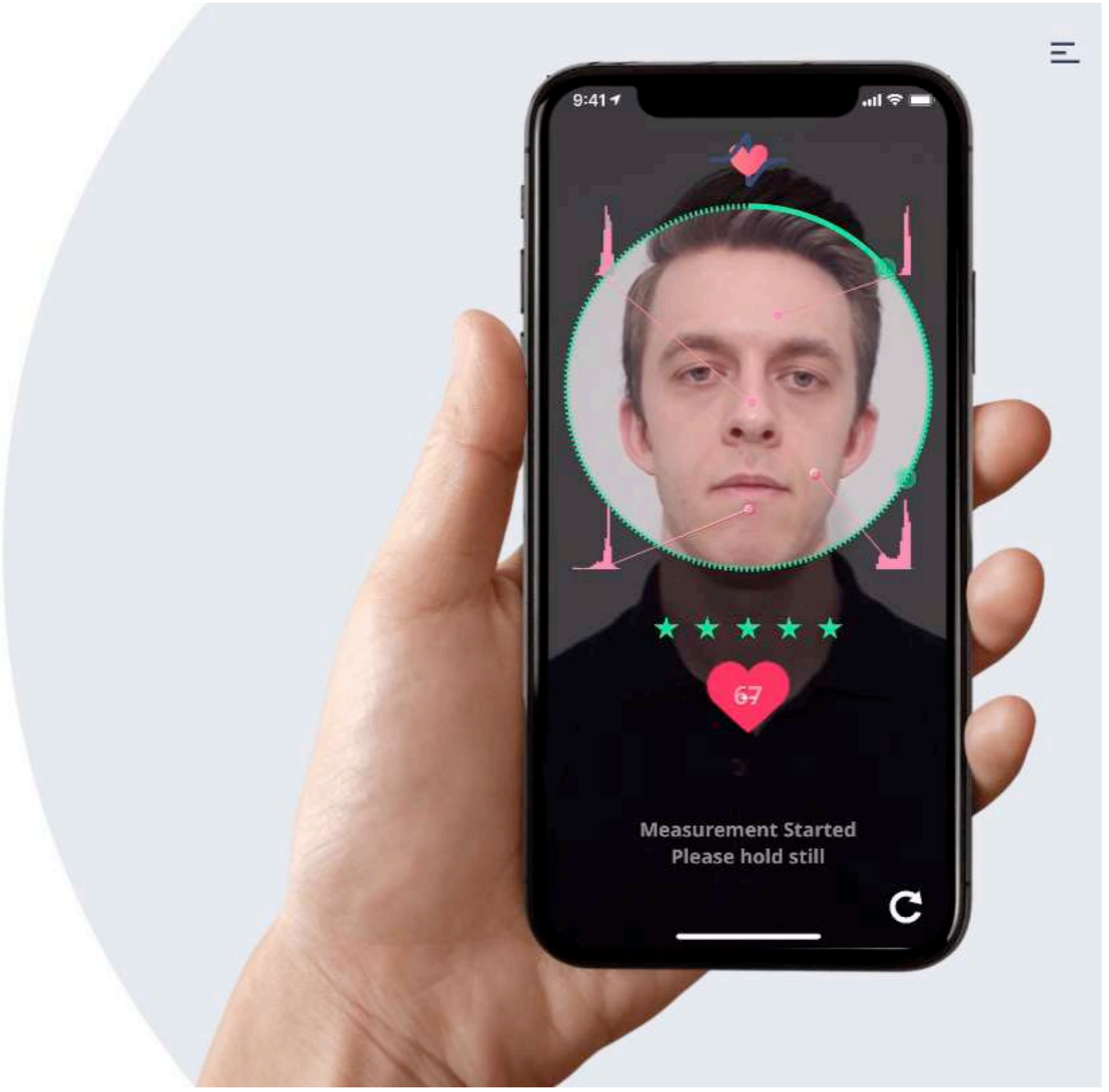
[Clinical studies](#)



[Research](#)




⚠️ Anura™ is not a substitute for the clinical judgment of a health care professional. Anura™ is intended to improve your awareness of general wellness. Anura™ does not diagnose, treat, mitigate or prevent any disease, symptom, disorder or abnormal physical state. Consult with a health care professional or emergency services if you believe you may have a medical issue.



TESLA MODEL S MODEL 3 MODEL X MODEL Y POWERWALL

# Model S



**2,5 s**  
De 0 à 100 km/h


**804 litres**  
Capacité de chargement

**652 km**  
Autonomie (WLTP)

COMMANDER

TESLA MODEL S MODEL 3 MODEL X MODEL Y POWERWALL

# Powerwall

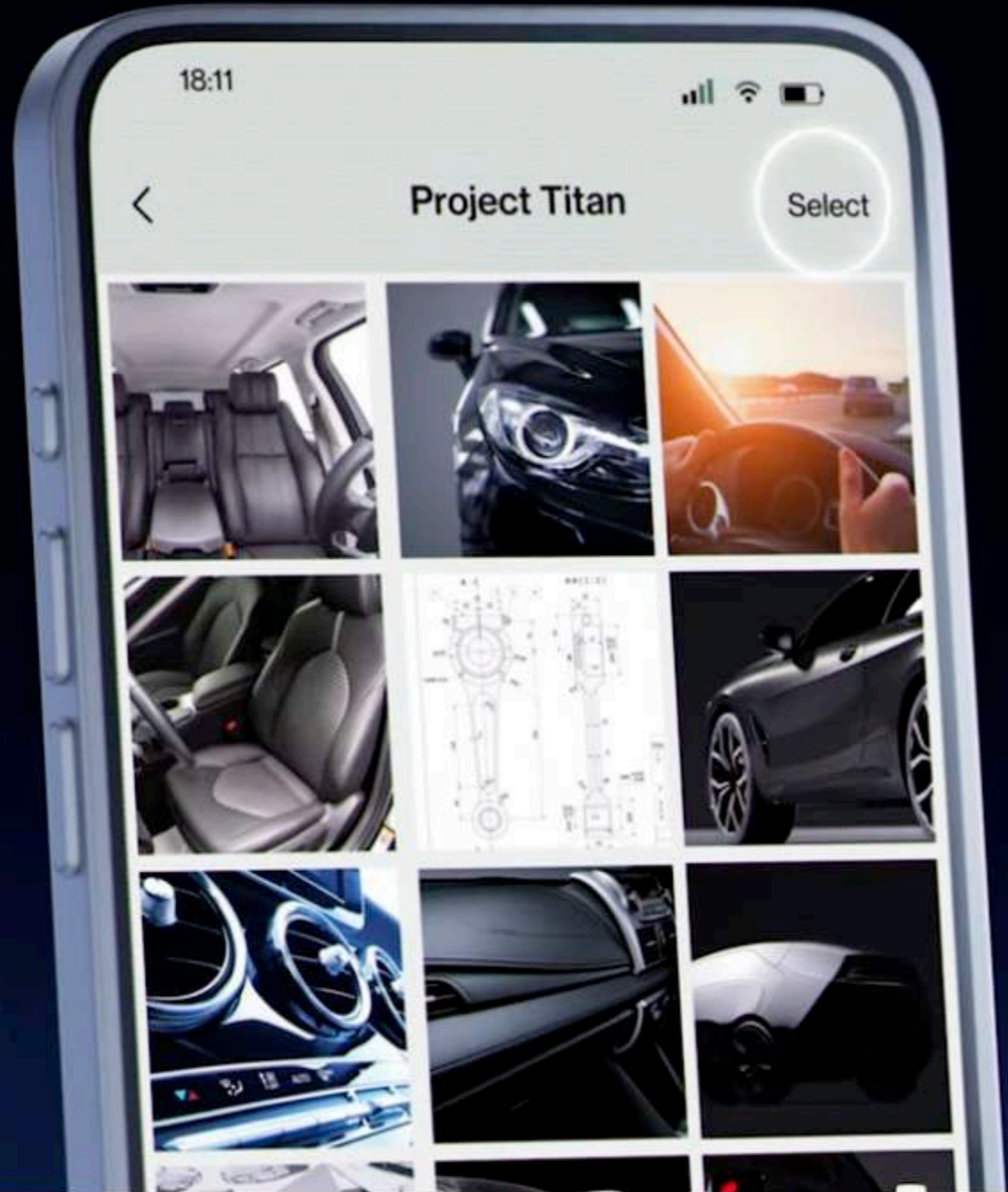


24/7  
Production de courant

A member of the team

RESERVES







Prime Air



N1997A



# Market capitalization of Zoom Video Communications vs. the 15 biggest airlines



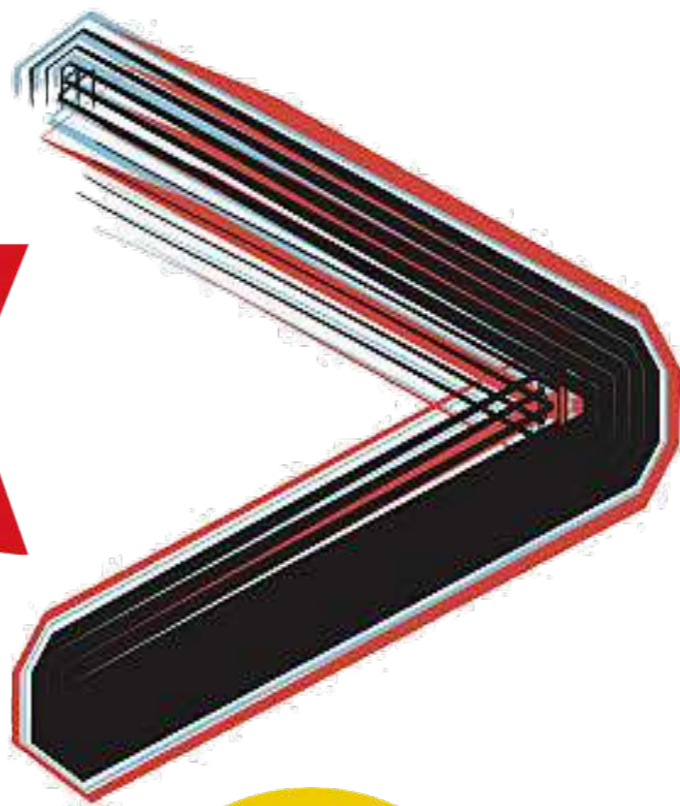
**\$151B**

**\$151B**

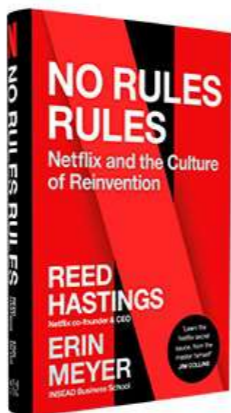
Notes: Airlines selected based on # of passengers transported in 2019; market cap as of Oct. 26, 2020

Source: Lufthansa Innovation Hub, TNMT.com, Yahoo Finance

# NETFLIX



# Disney



**11/11/2022**

**100 BILLION \$ ?**

**2024 : separate in 6**



WeChat



Hubert Kratiroff 

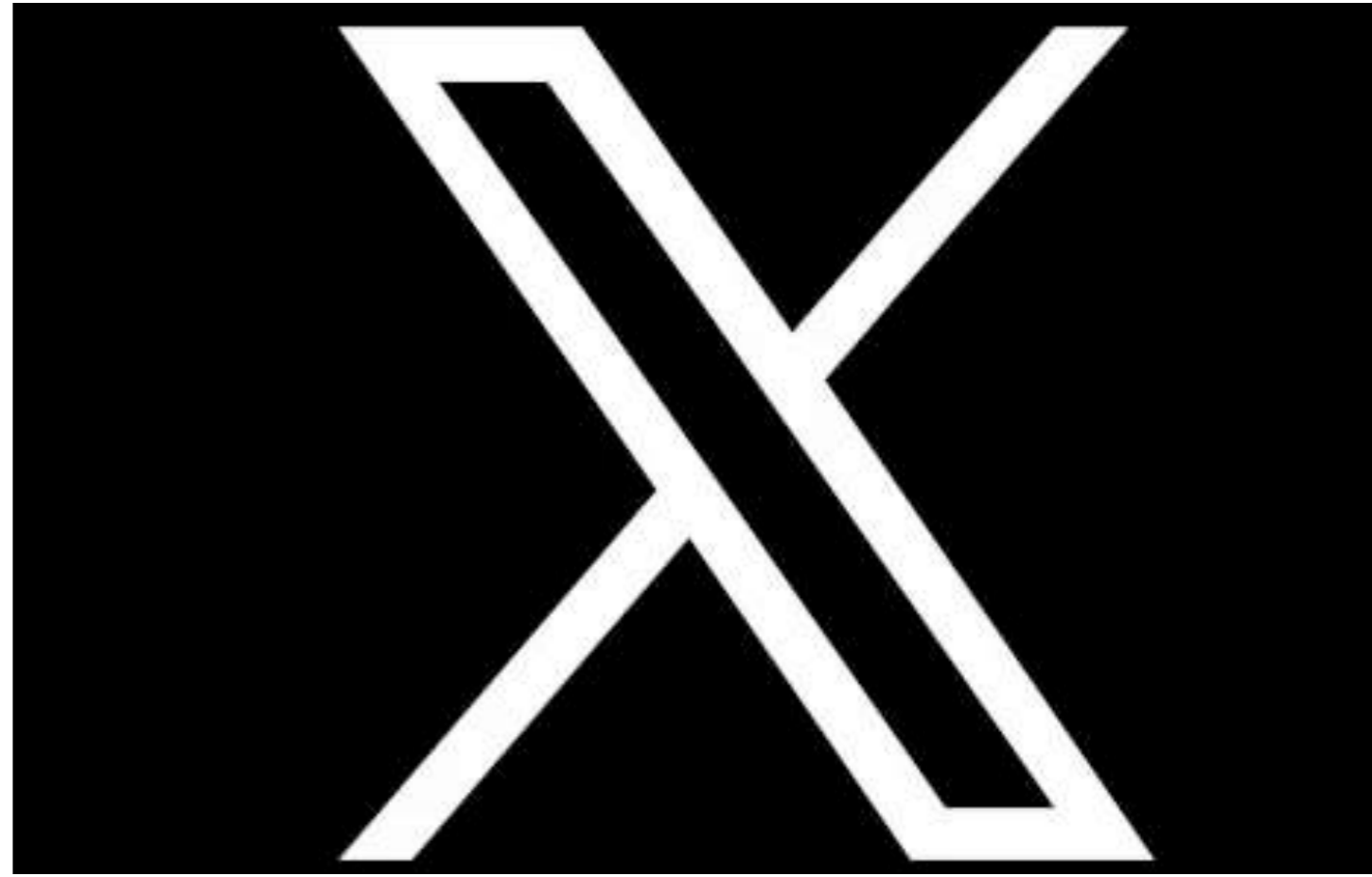
France

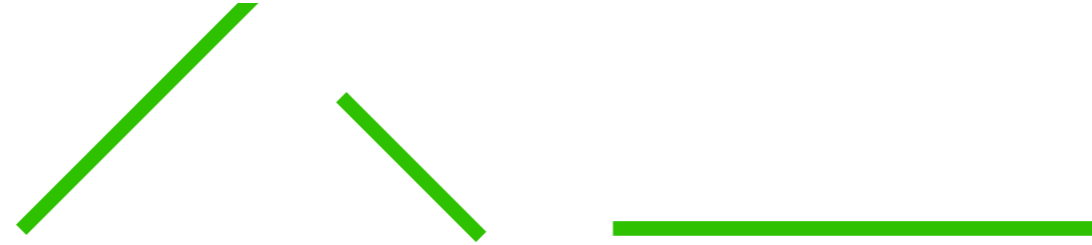


Scan the QR code to add me on WeChat

Everything

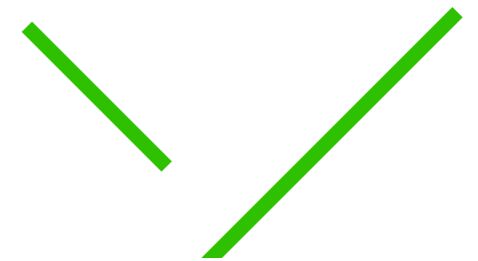
APP





DISRU

JPTION



# DISRUPTION



---

## Disruption

O-ICQ → QQ  
+ 2011 WeChat  
+2015 WeChat Pay  
Mini MicroProgram  
Open Source SDK

---

## Uberisation

Riot Game LOL  
Supercell , UbiSoft  
e-Sport  
TME Tencent Music  
Entertainment  
Karaoke  
Vidéo

## Taycoonisation

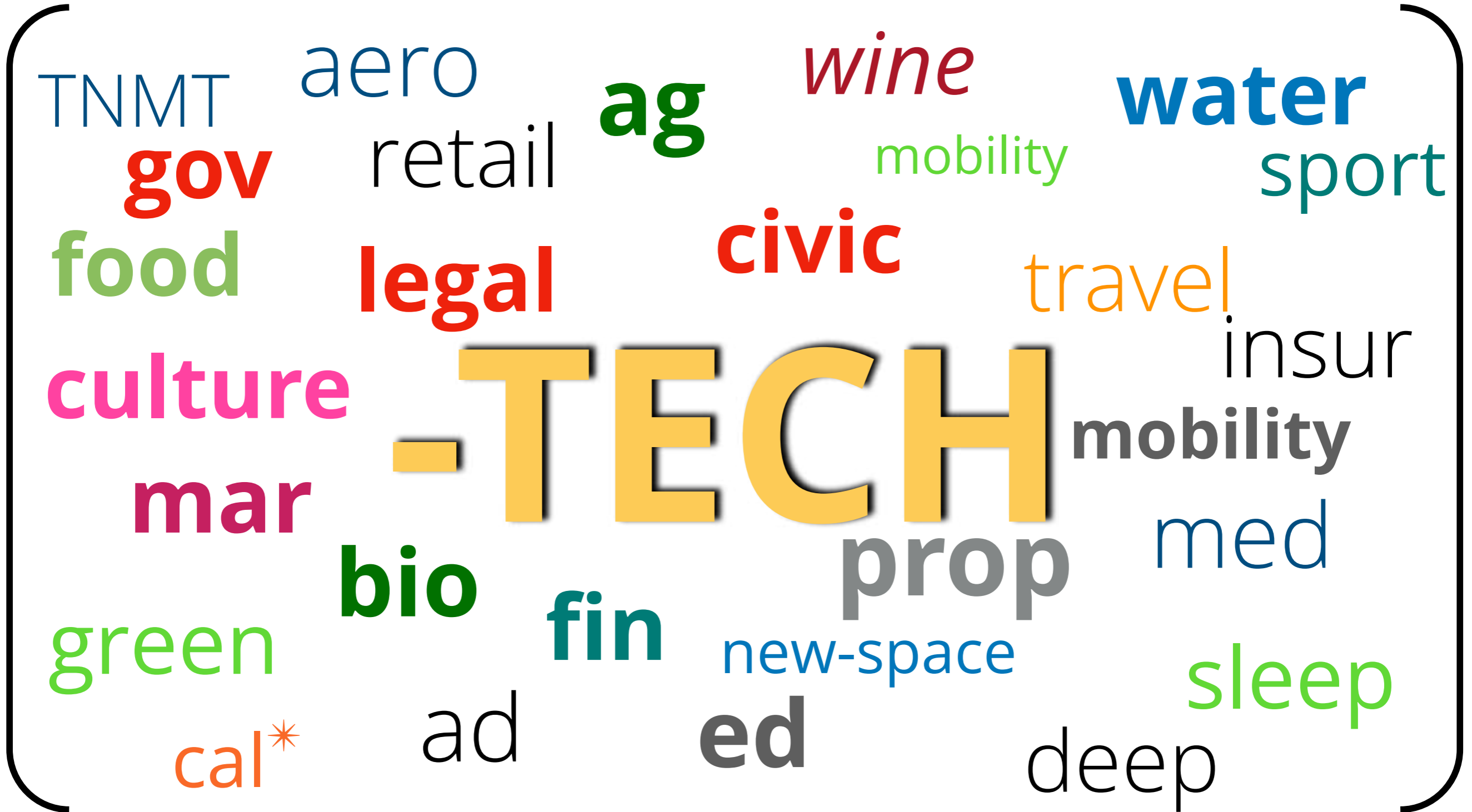
Pony Ma  
11e ste mondiale  
5% Tesla

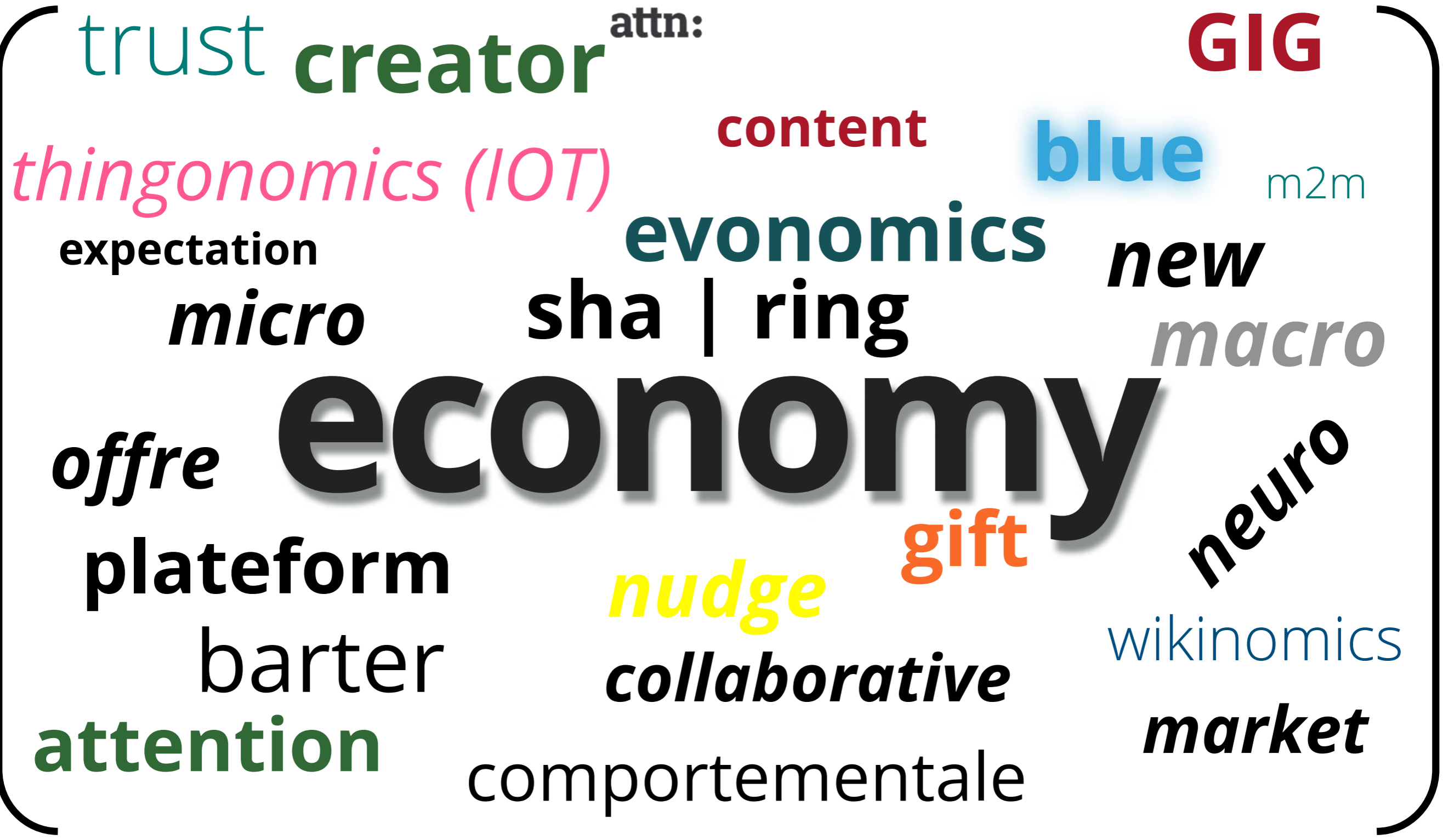


**XXX**

**AAS**







trust **creator**

attn:

**GIG**

*thingonomics (IOT)*

**content**

**blue**

m2m

expectation

**evonomics**

**new**

**micro**

sha | ring

*macro*

*offre*

**economy**

**neuro**

**platform**

**gift**

**nudge**

**barter**

**collaborative**

wikinomics

**attention**

**market**

comportementale

GAFFA  
Big Tech  
Magnificent 7

**GAF**A

*MSNX*

**NATU**

*BEY*

**BATX**

*HBP*

**КНОЛ**

**G A F A**

Google\* Amazon Facebook\* Apple

**M S N X**

Microsoft Salesforce NVIDIA\*

**N A T U**

Netflix Airbnb Tesla Uber

**B E Y**

Booking Expedia Yandex\*\*

**B A T X**

Baidu Alibaba Tencent Xiaomi

**H B P**

Huawei Bytedance Pinduoduo\*\*\*

\* *Alphabet Meta = MAAMANSX Cisco / Oracle*

\*\* *Naver / Jumio*

\*\*\* *DJI / Hikvision / SheIn*

Qui disrrupte

les

BATXBDH?

**UX-CX**

*FlyWheel*

**growth  
hacking**

**content**

**omnicanal**

**platform**

**ZMOT**

*micro-moment*

**ABM**

**SEO-A**

**strategy**

**copy  
cat**

**data  
driven**

**PLG**

**collaborative  
mutuelle**

**HOOK MODEL**

*freemium*

**inbound**

**servicisation**

**POEM**

*attribution  
contribution*



1/

*PUSH marketing*

**Catalogue produit**  
**Offre initiale (solution)**  
**Type de Problème résolu**  
**Persona**  
**Carte empathie**  
**Value proposition**  
**Offre finale**  
**Distribution**

**techno  
p u s h  
putsch**

**Persona**

**Carte empathie**

**Problèmes réels**

**Value proposition**

**Offre**

**(solution qui résout le problème,  
constitution d'un panier de solutions)**

**Distribution**

**2/**

***PULL marketing***



**techno push**  
**vs.**  
**market pull**



AAARRR

*TUNNEL FUNNEL ENTONNOIR PIPELINE*



A

A

A

R

R

R €

**SAMSUNG**

**AAAA  
RRRR**

**G**

**TOFU**

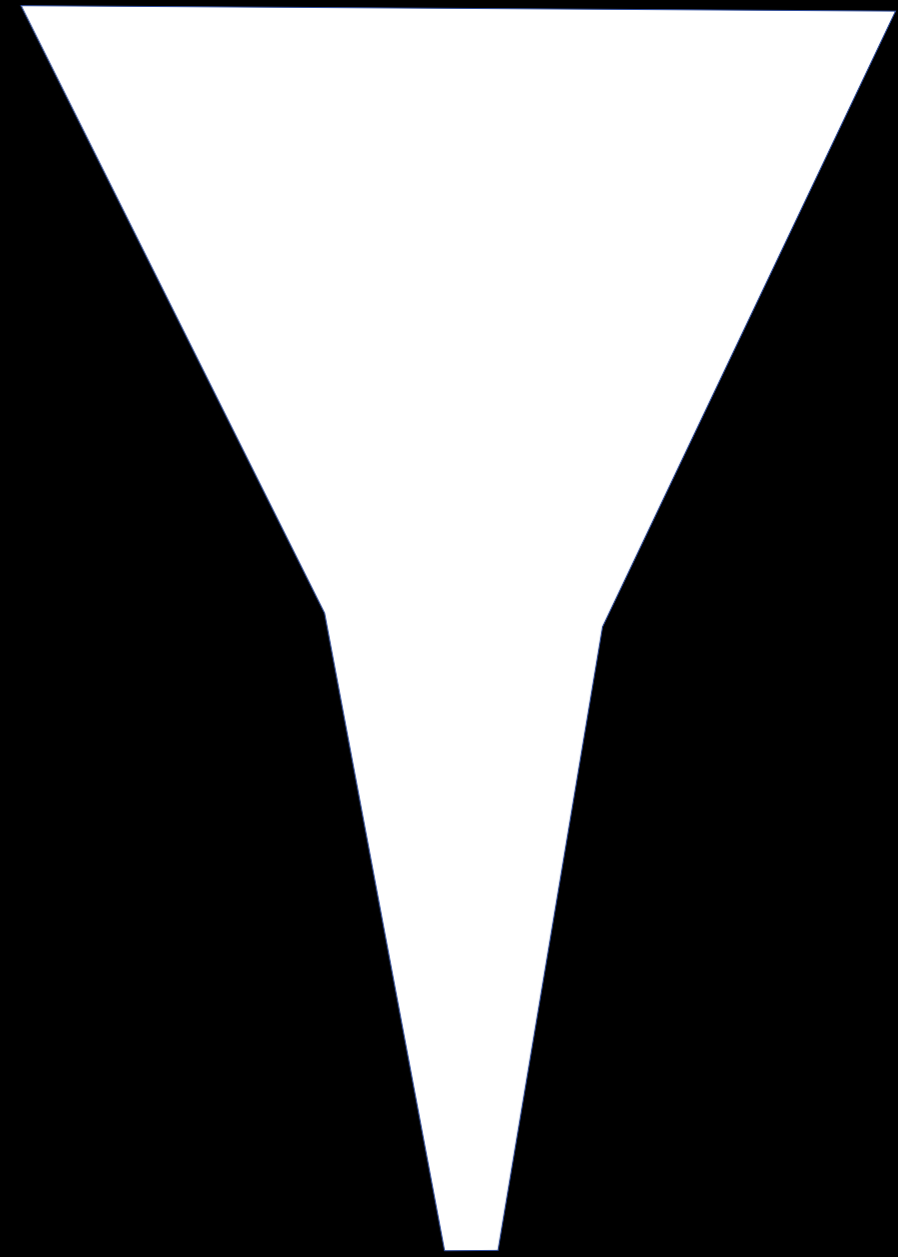
**Top of the Funnel**

**MOFU**

**Middle of the Funnel**  
**MID FUNNEL**

**BOFU**

**Bottom of the Funnel**



Marketing Attribution  
vs. Contribution

Last customer  
interaction ?

# **Attribution Contribution Cookieless**

- **last clic**
- **every clics**
- **login**  
**Walled Garden**



# Attribution

100% efficiency to 1  
action :

*pub*

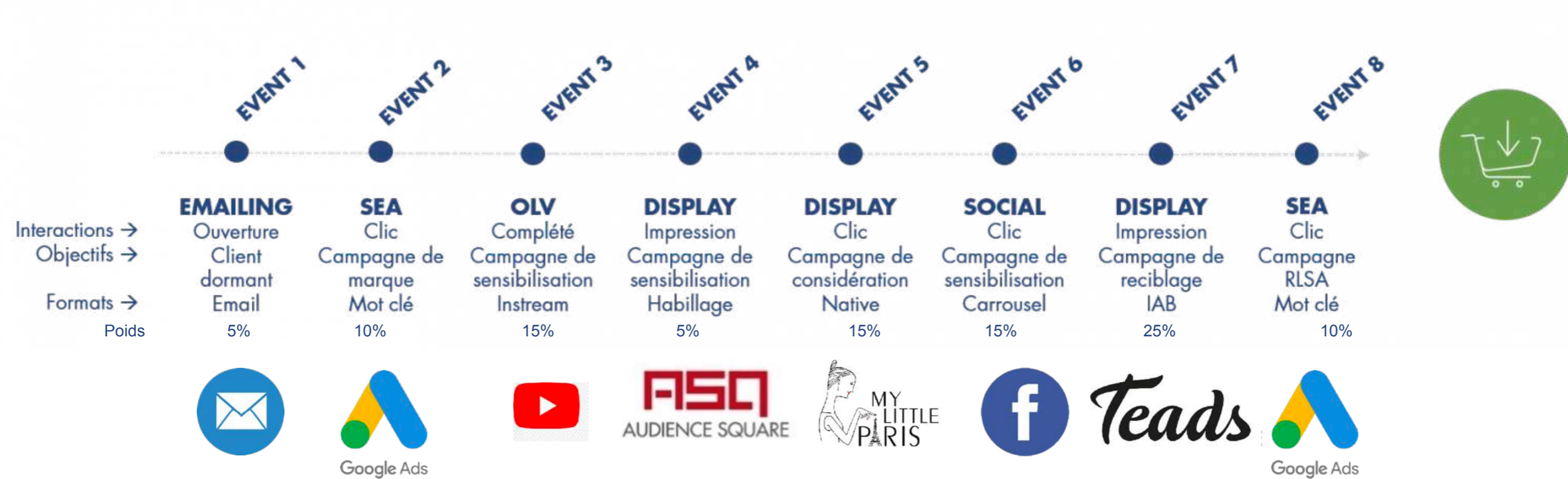
*recherche*

*first clic*

*last clic*

...

# Contribution



**PAID  
OWNED  
EARNED  
SHARED**

**marketing  
média**

LTV, also referred to as CLV (or customer lifetime value), is determined by multiplying three factors together:

$$CAC < LTV$$

$$LTV = \text{Average value of purchases} \times \text{Average number of purchases per year} \times \text{Average value of purchases}$$

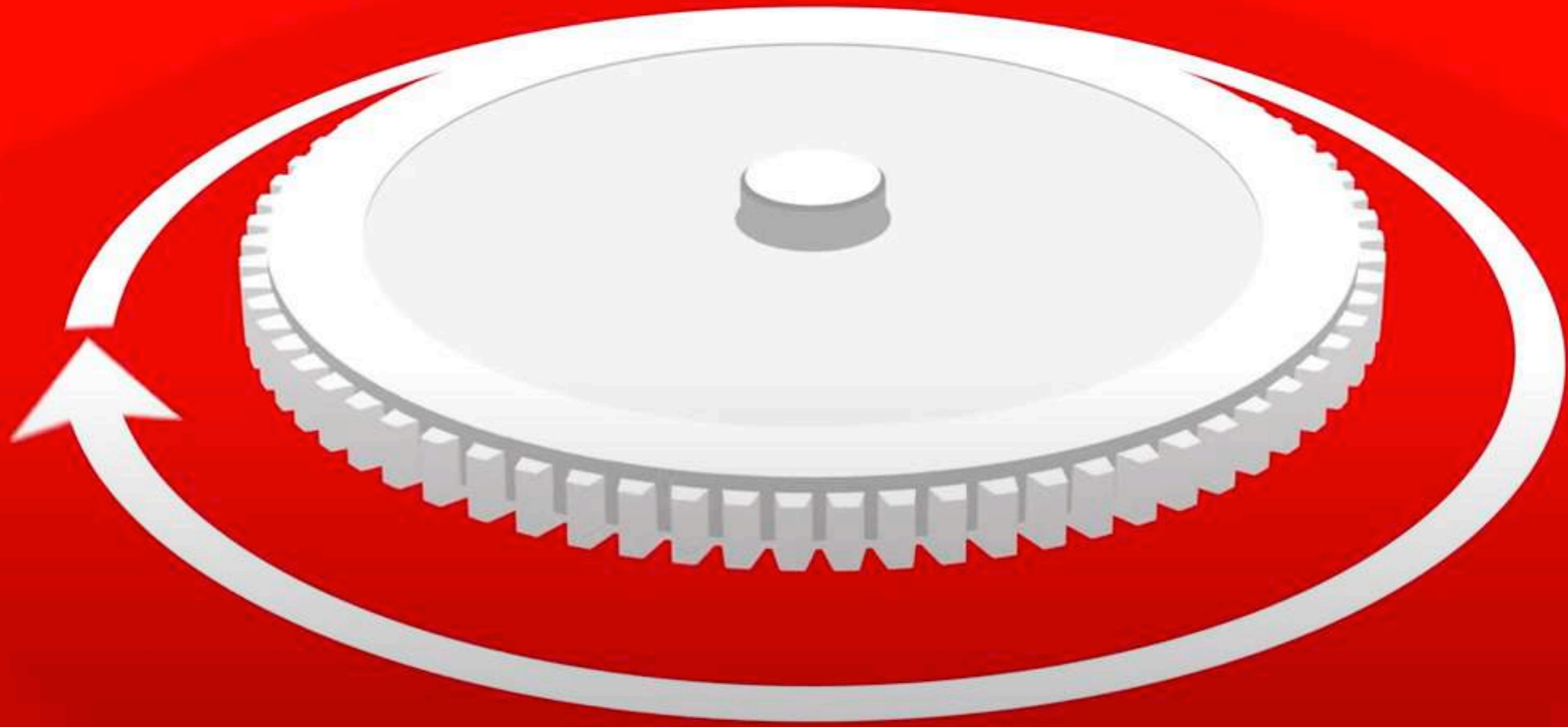
To calculate the LTV:CAC ratio, divide the customer lifetime value by the cost of customer acquisition.

$$CAC < LTV$$

$$\text{LTV:CAC Ratio} = \frac{\text{Customer Lifetime Value}}{\text{Customer Acquisition Cost}}$$

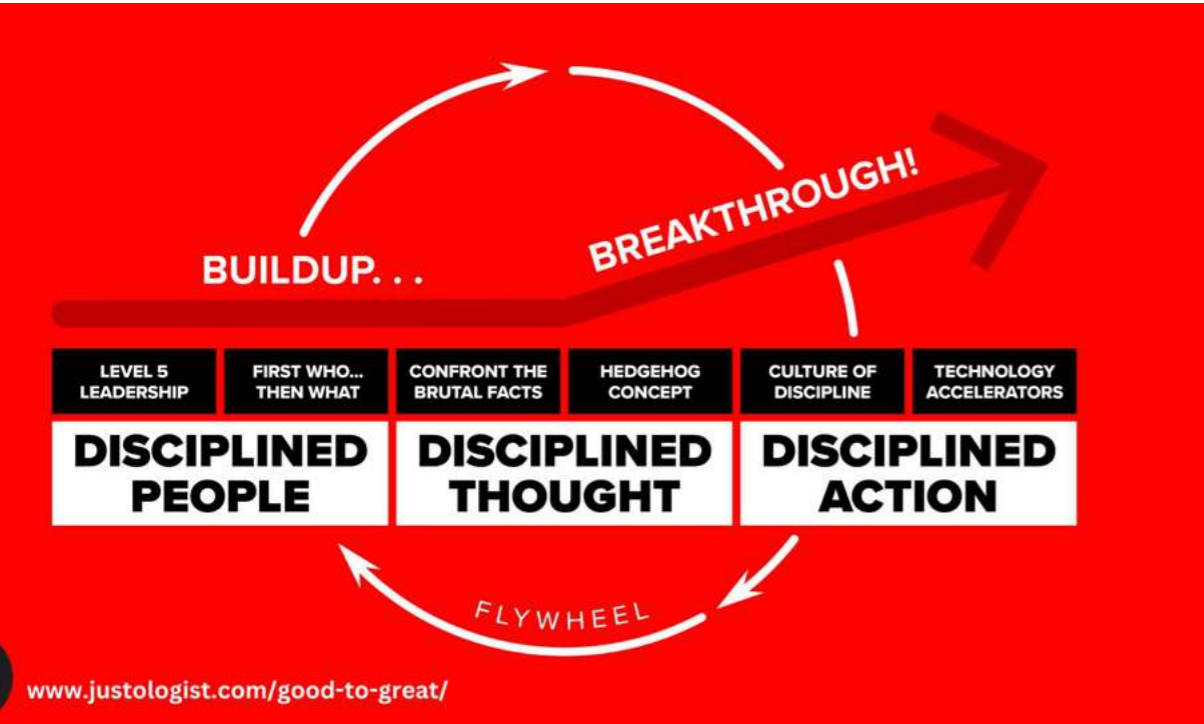
Imagine your customers spend an average of \$20 twice a year, for two years. This would result in an LTV of \$80 (\$20 x 2 x 2).

To calculate your LTV:CAC ratio, divide your LTV by your CAC from the previous example, which was \$24. The resulting ratio is 3.33:1, indicating that for every dollar spent on

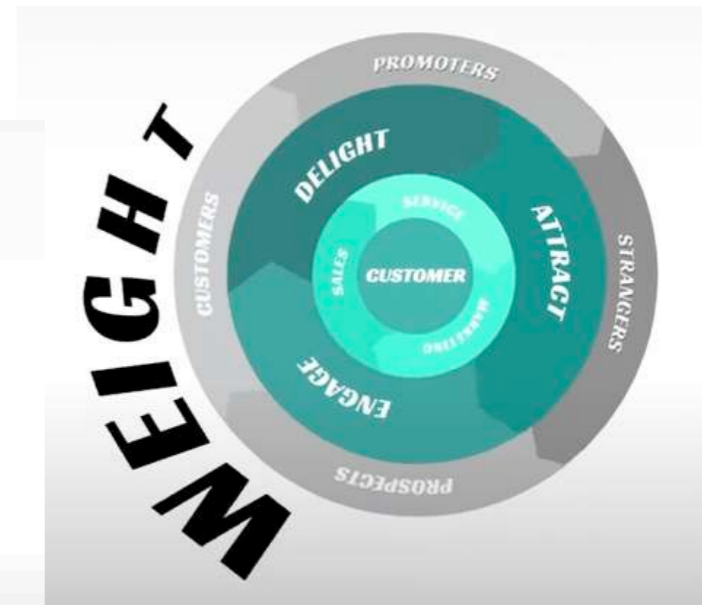
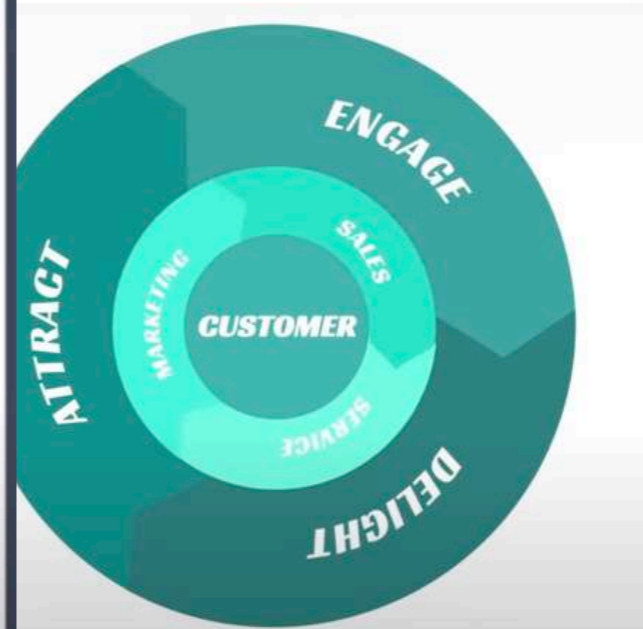
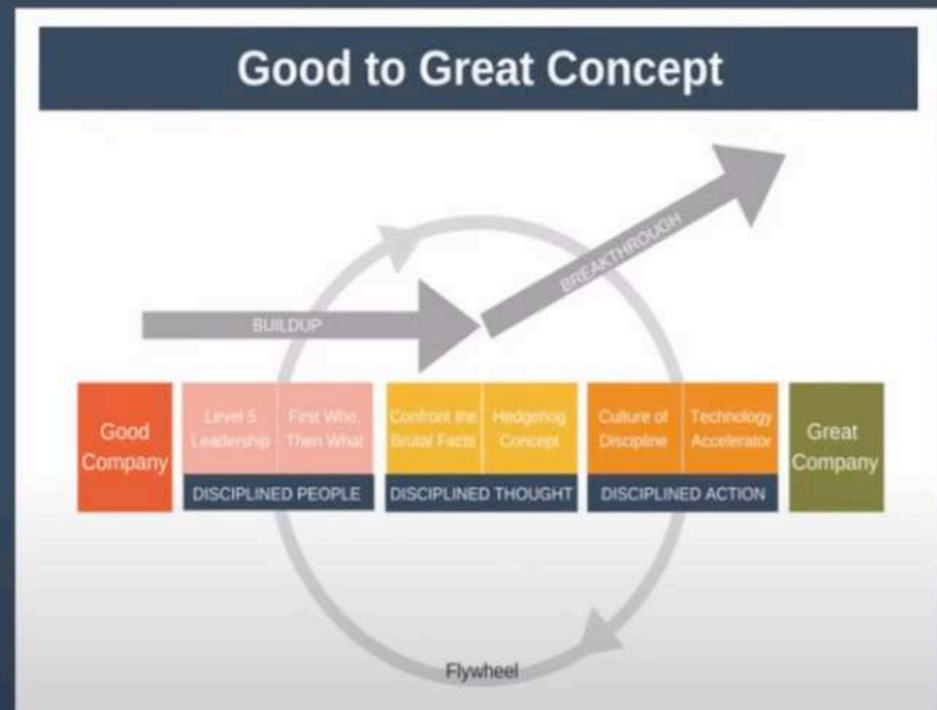


# FLYWHEEL

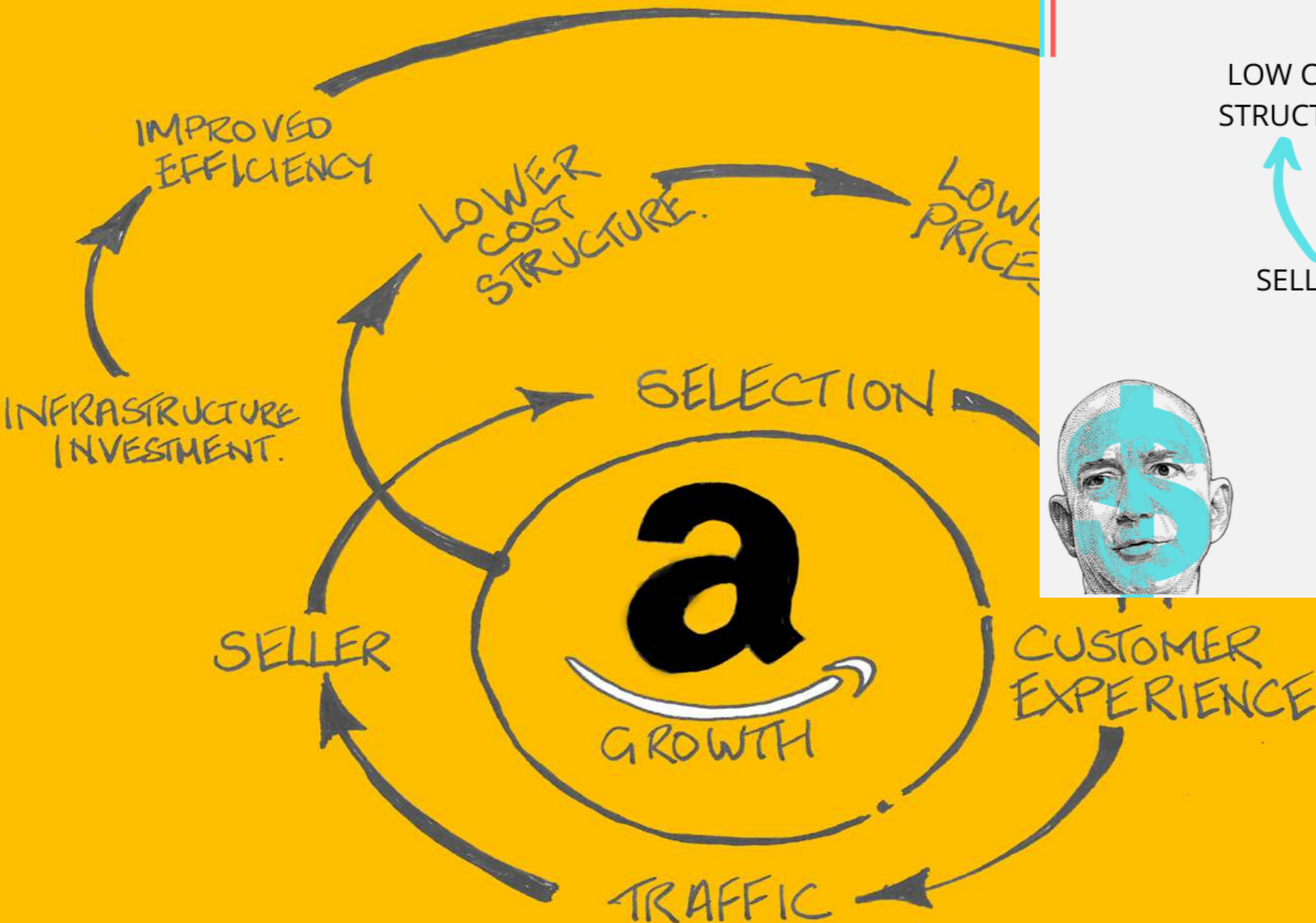




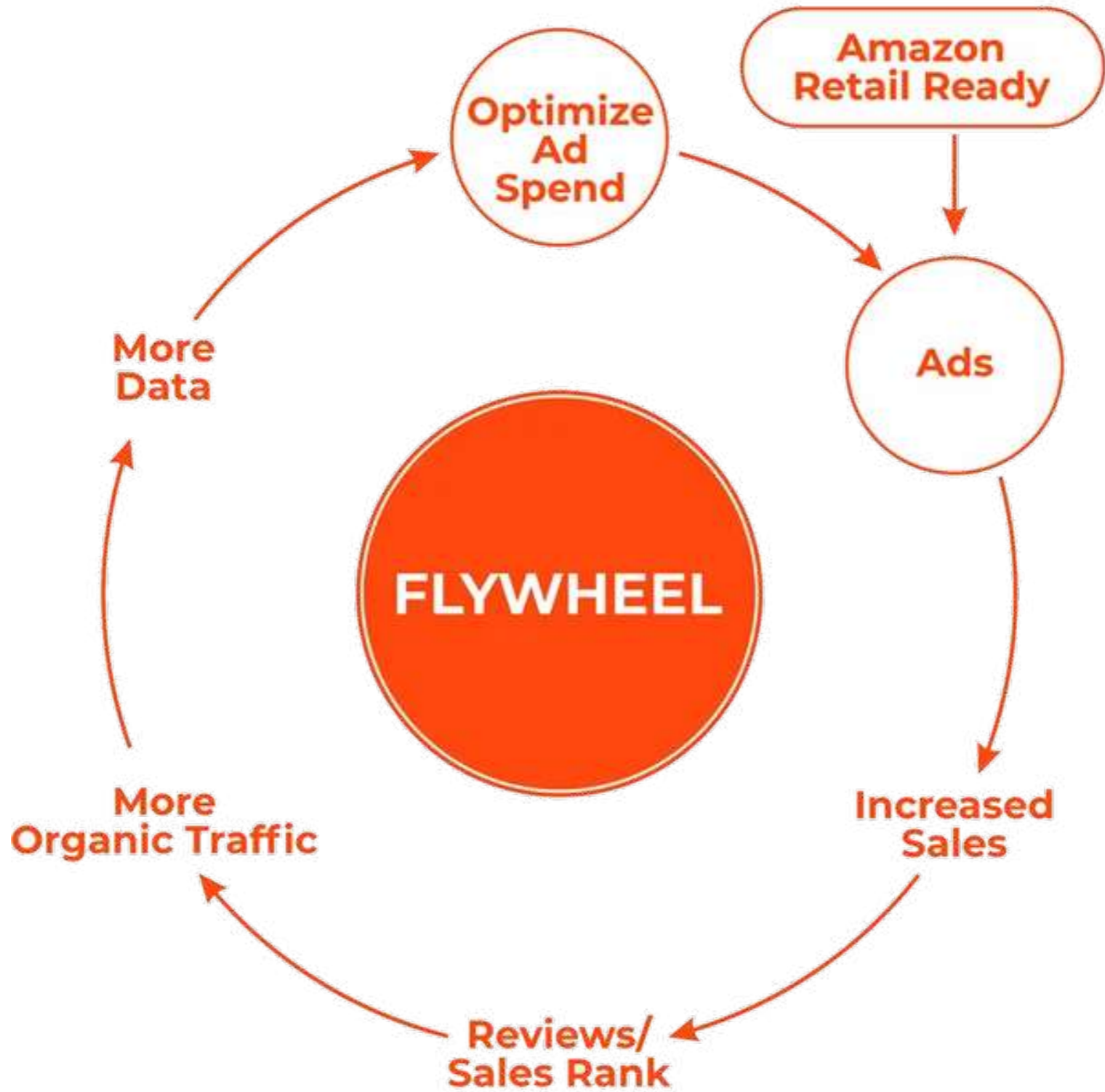
is about companies  
 me great.  
 hey do it?  
 ine...  
 ined people.  
 ined thought.  
 ined action.  
 ne enemy of great.



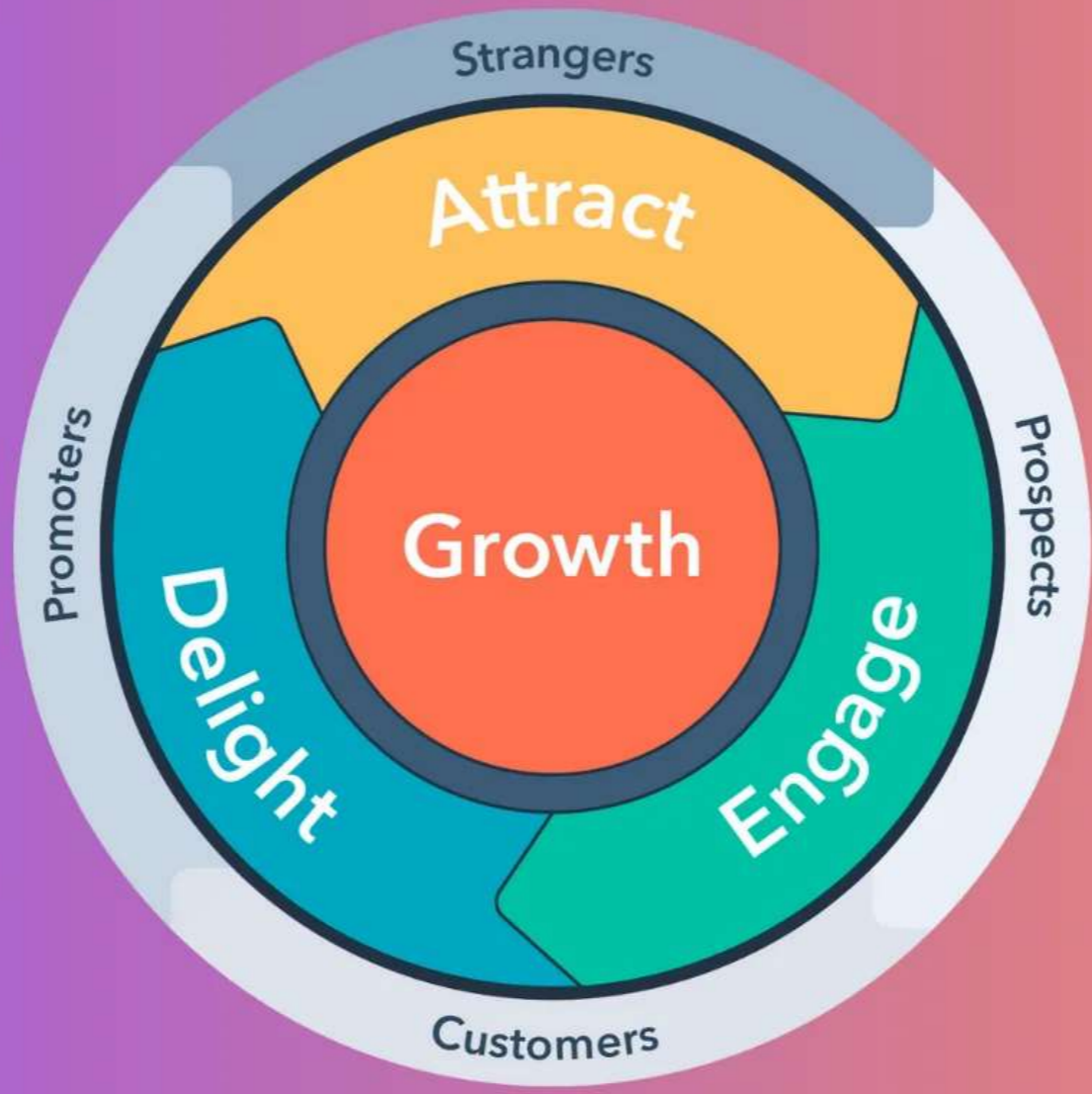
# GROWTH FLYWHEEL DIAGRAM



Amazon Flywheel & The Virtuous Cycle Model







# INBOUND MARKETING



# INBOUND

//

**#CustomerEmpowerment**



# ZMOT → micro moments



## I-want-to-know moments

65%

of online consumers look up more information online now versus a few years ago.<sup>2</sup>

66%

of smartphone users turn to their phones to look up something they saw in a TV commercial.<sup>3</sup>



## I-want-to-go moments

2X

increase in "near me" search interest in the past year.<sup>4</sup>

82%

of smartphone users use a search engine when looking for a local business.<sup>5</sup>



## I-want-to-do moments

91%

of smartphone users turn to their phones for ideas while doing a task.<sup>6</sup>

100M+

hours of "how-to" content have been watched on YouTube so far this year.<sup>7</sup>



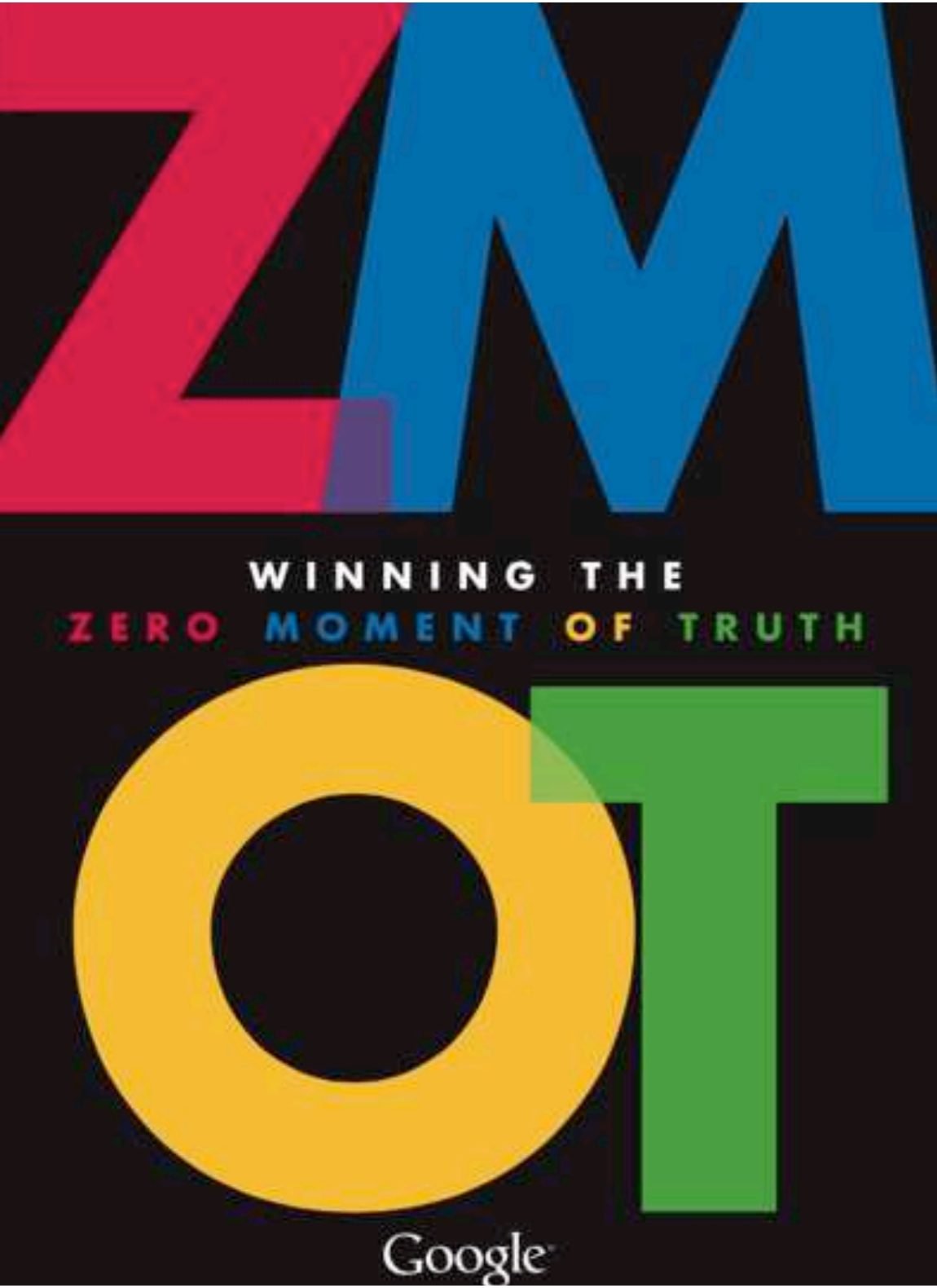
## I-want-to-buy moments

82%

of smartphone users consult their phones while in a store deciding what to buy.<sup>8</sup>

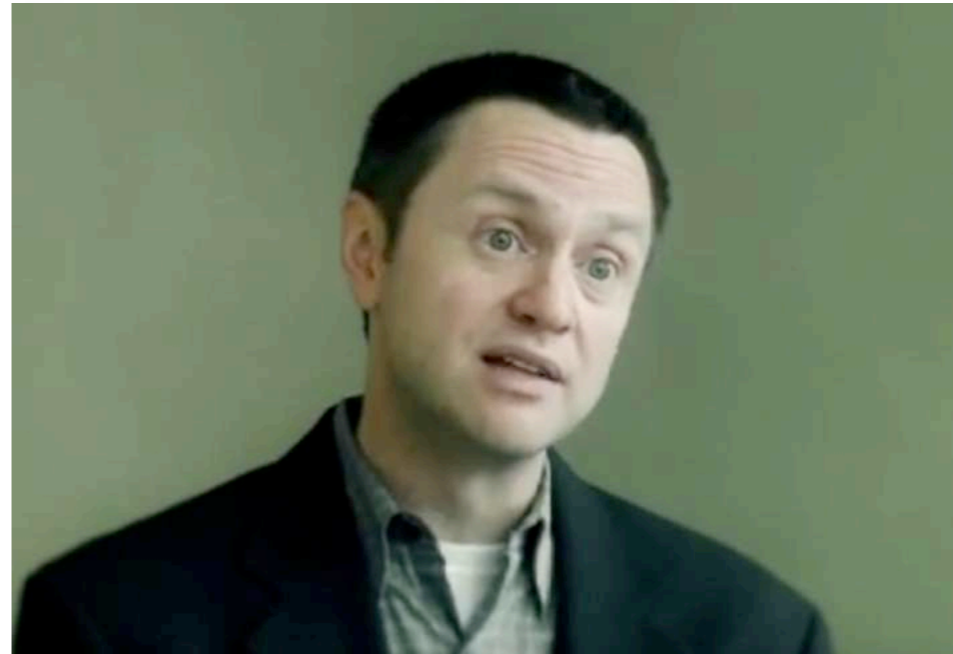
29%

increase in mobile conversion rates in the past year.<sup>9</sup>



**JIM LECINSKI**

CHIEF ZMOT EVANGELIST



P&G 2005 : First Moment of Truth  
+ Google 2010 : + ZERO MOMENT



Stimulus

**ZMOT**  
↑

First  
Moment of Truth  
(Shelf)

Second  
Moment of Truth  
(Experience)

Content is

king

“Content is King”

*Bill Gates, 1996*





# WebStory =

story snap on website mobile and laptop

[https://amp.dev/documentation/guides-and-tutorials/start/create/basic\\_markup/](https://amp.dev/documentation/guides-and-tutorials/start/create/basic_markup/)

[https://amp.dev/documentation/guides-and-tutorials/start/visual\\_story/](https://amp.dev/documentation/guides-and-tutorials/start/visual_story/)

<https://creators.google/en-us/content-creation-products/own-your-content/web-stories>

<https://www.canva.com/templates/?query=story>

# StoryTelling

**NoStory : NoBusiness**

BRAND CONTENT

//vs.

content strategy

**POEM**

...

**POES M**

**G**

# POES m

**Paid**

**Owned**

**Earned**

**Shared**

**Média & Marketing**



**MANAGEMENT STRATEGY DIGITAL  
MSD BY HUBERT KRATIOFF  
2024**

**SEASON 03  
EPISODE 03**



AdTech

MarTech

# Le marché dépasse son niveau de 2019

		vs 2022	vs 2019
<b>Marché Global</b>	<b>34,1</b> Mds €	<b>+3,7%</b>	<b>+0,7%</b>
<b>5 médias</b> Presse, TV, Radio, Affichage, Cinéma	<b>8,2</b> milliards €	<b>-0,4%</b>	<b>-3,8%</b>
<b>Digital</b> Display, Search, Social et Médias Propriétaires Numériques	<b>9,6</b> milliards €	<b>+6,1%</b>	<b>+40,6%</b>
<b>Autres médias</b> MD, Annuaire, Promos et PLV, Evènementiel	<b>16,3</b> milliards €	<b>+4,4%</b>	<b>-11,9%</b>



# Évolution des différents leviers de communication

	Valeur 2023 (en M€)	2023/2022	2023/2019	indice 2019
Digital	9 577	6,1%	40,6%	140
Promotions & PLV*	6 062	9,6%	5,0%	104
Radio	839	3,9%	0,5%	100
Télévision	4 072	-2,8%	0,3%	100
Publicité extérieure	1 384	5,1%	-0,8%	99
Evènementiel**	4 678	19,3%	-3,9%	95
Presse	1 772	-3,1%	-15,4%	84
Cinéma	151	34,0%	-16,5%	83
Annuaire	436	-7,5%	-28,4%	71
Marketing direct	5 082	-10,0%	-29,5%	70
<b>MARCHÉ GLOBAL DE LA COMMUNICATION</b>	<b>34 053</b>	<b>3,7%</b>	<b>0,7%</b>	<b>100</b>

\*dont communication par l'objet = 1,4 milliard soit +3,5% vs 2022

\*\* L'évènementiel comprend le parrainage, le mécénat, les relations publiques et les salons et foires

5 Médias
  Autres Médias
  Digital

L'indice 100  
correspond à  
l'évolution moyenne  
totale du marché

Média	Recettes 2023 (en M€)	Variation vs 2022 (%)	Variation vs 2019 (%)
Total des médias	17,317	3,4	14,1
Cinéma	82	30,4	-17,3
Radio	722	3,1	1,1
Presse	1,749 dont +/- 500 digital	-2,7	Non spécifié
Publicité extérieure	1,285 dont 268 digital	5,2	-1,9
Télévision	3,382	-3	Non spécifié
Recettes digitales (TV, Presse, Radio, DOOH)	897	8,1	39,6
Audio digital	Non spécifié	21,7	Non spécifié
Vidéo digital	Non spécifié	17,3	Non spécifié
DOOH (Digital out of home)	Non spécifié	17,1	27,9
Annuaire	460	-8 %	-34 %
Courrier publicitaire + ISA	1,008	-7 %	-28 %

Baromètre Unifié du Marché Publicitaire et de la Communication (BUMP)

INVESTISSEMENTS EN COMMUNICATION DES ANNONCEURS PAR MEDIA	Valeur 2023	Part de marché	Evol 2023/2022	Evol 2023/2019
	en M€	en %	en %	en %
Presse	1 772	5,2%	-3,1%	-15,4%
Télévision	4 072	12,0%	-2,8%	0,3%
Radio	839	2,5%	3,9%	0,5%
Publicité extérieure	1 384	4,1%	5,1%	-0,8%
Cinéma	151	0,4%	34,0%	-16,5%
<b>Sous Total 5 MEDIAS</b>	<b>8 218</b>	<b>24,1%</b>	<b>-0,4%</b>	<b>-3,8%</b>
Marketing direct	5 082	14,9%	-10,0%	-29,5%
Courrier publicitaire	1 787	5,2%	-7,4%	-28,1%
ISA	1 820	5,3%	-16,1%	-35,3%
Autre marketing direct	1 475	4,3%	-4,6%	-22,6%
Annuaire	436	1,3%	-7,5%	-28,4%
Promotions	6 062	17,8%	9,6%	5,0%
dont Communication par l'objet	1 400	4,1%	3,5%	-0,2%
Evènementiel*	4 678	13,7%	19,3%	-3,9%
<b>Sous Total AUTRES MEDIAS</b>	<b>16 257</b>	<b>47,7%</b>	<b>4,4%</b>	<b>-11,9%</b>
Digital	9 577	28,1%	6,1%	40,6%
<b>MARCHE DE LA COMMUNICATION</b>	<b>34 053</b>	<b>100,0%</b>	<b>3,7%</b>	<b>0,7%</b>

6- search**	4 096	10,6%	65,2%
7- social**	2 468	11,5%	70,0%
8- display**	1 778	5,7%	38,8%
9- autres leviers (affiliat	970	7,3%	25,7%

L'évènementiel comprend le parrainage, le mécénat, les foires, les expositions et les relations publiques.

Source : FRANCE PUB

9- autres leviers (affiliation, emailing, comparateurs)\*\*

# Télévision, un recul modéré

**3 382**  
millions €

≡ **-3%**  
vs 2022

≡ **-0,6%**  
vs 2019



**6 379**  
annonceurs

## Top 3 annonceurs

1.



2.



3.

**FERRERO**

## TV LINÉAIRE

**2 691** annonceurs

dont  
exclusifs

**18%**

## TV DISPLAY

**4 421** annonceurs

dont  
exclusifs

**47%**

## REPLAY IPTV

**1 952** annonceurs

dont  
exclusifs

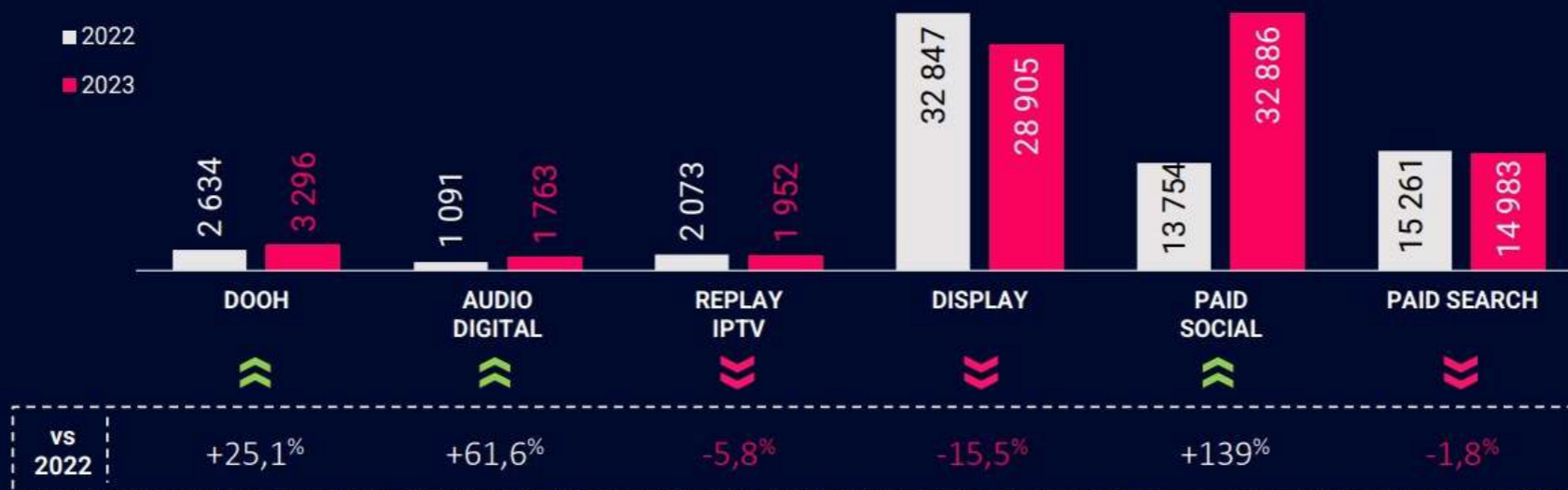
**7%**

# Un marché digital dynamique



# 56 856 annonceurs en digital

dont 76% exclusifs digitaux



# 97% des annonceurs du paid social utilisent Meta

## 32 886

annonceurs  
Paid Social



Instagram



Facebook



TikTok



Snapchat



### Top 3 secteurs

1.  
MODE



13%

2.  
DISTRIBUTION



12%

3.  
SERVICES



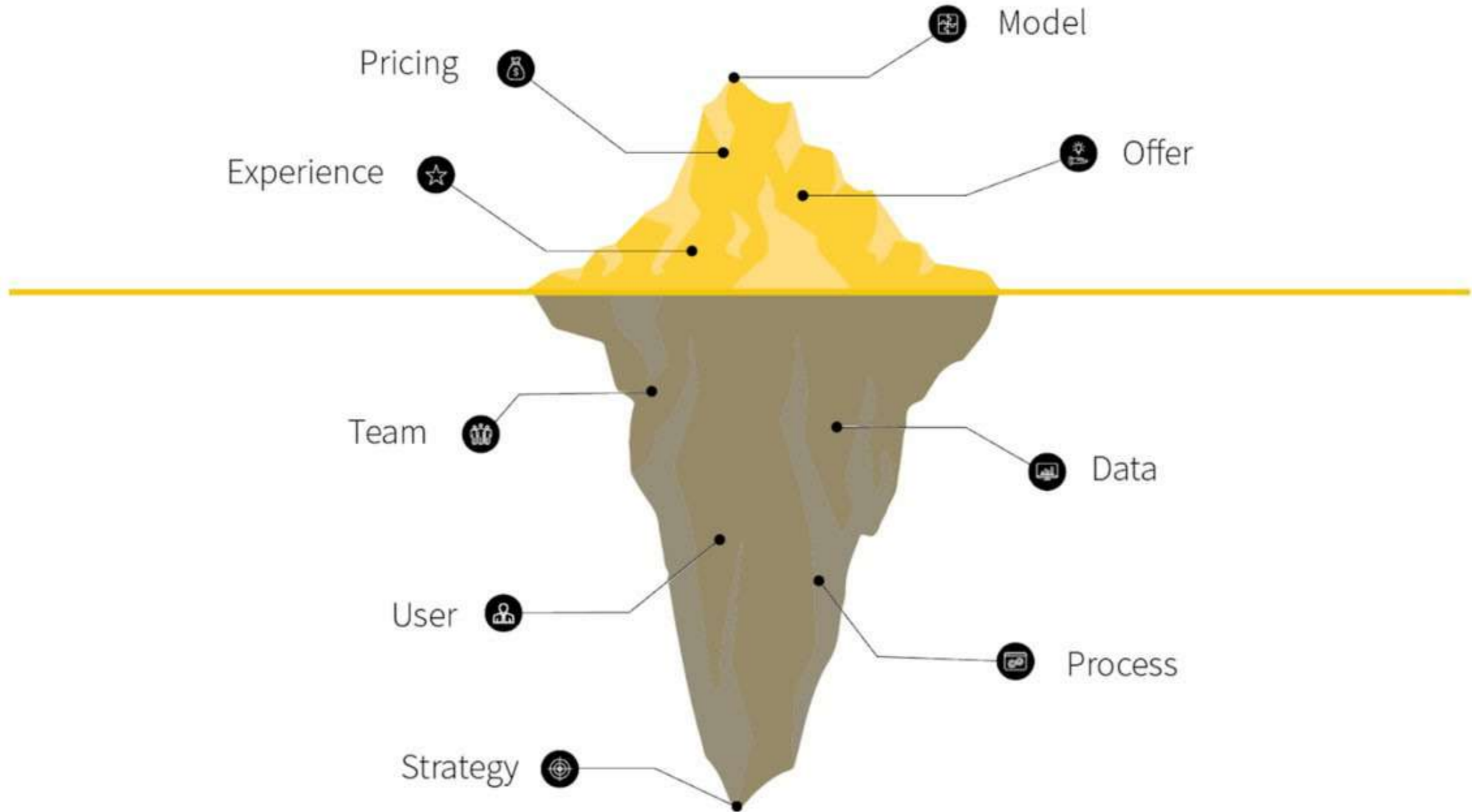
8%

### Top 3 annonceurs

amazon



# Product-Led Growth






PARIS  
RETAIL  
WEEK

17. 18. 19  
SEPT. 2024  
PARIS EXPO  
PORTE DE  
VERSAILLES  
PAVILION 7.3

# RETAILIGENCE



MORE  
BRAIN  
MORE  
GAIN

Work created by D&B

COME POSIUM

#ParisRetailWeek



# RETAILIGENCE

# RETAILIGENCE



Bridging the  
marketing &



<https://numeum.fr/>

Syndicat et organisation professionnelle de l'écosystème numérique en France

# Engager le numérique

ESN · Éditeur de logiciels · Conseil en technologies · Plateforme

NOS ÉVÉNEMENTS →

Numeum est membre de la fédération Syntec



# L'observatoire du numérique

Numeum produit des études et des notes de conjoncture chaque semestre pour donner une vision claire du marché du numérique et de son évolution.

[VOIR LES ÉTUDES](#)

CHIFFRES DU SECTEUR

CHIFFRES DE NUMEUM

**661 334**

salariés dans le  
secteur

**29 348**

entreprises

**66,2**

milliards d'euros  
de chiffre  
d'affaires

**311,1**

Indice février  
2024



# CAC x 3 /an

Customer  
Acquisition  
Cost

coût pub + enchères  
pourvoir achat  
coût juridique  
concurrence  
ARPU baisse  
difficulté abonnement

# « AdTech & Programmatisation »

# « AdTech Programmatische »



RTB

AdExchange





# Programmation

4 milliards = 50% de la pub

RTB

SSP créer les deals les curated deal sur les inventaires

DSP outil d'achat du média

AdExchange

Media Trading

SPO supply path optimisation avec ESG et durabilité

DOOH piloté en programmation

header bidding interroge plusieurs SSP avec cout de serveur important sauf si SPO moins energivore

auto private curated preferred

no walled garden, no search, no retail media, no google, no meta,

18 SSP connectées à Adomik

DISPLAY ban habillage baisse 12%

VIDEO baisse 6% baisse CPM hausse volume hausse inventaire 40% revenue programmatic instream outstream preroll

NATIVE

AUDIO avec podcast CPM plus élevé que vidéo car qualité d'écoute forte et affinité forte

PLUS OPERATION SPECIALE 10% du marché

# Programmation

cookiless 3<sup>rd</sup> party

95% du trafic est anonyme

comment mesure campagne pub

AMZads solution

1/dcr = amz marketing cloud = croise FPD client FPD AMZ

2/ contextuel = achat chez amz

3/ mesure insight granulaire haut funnel bas funnel

attrib contrib

difficulté de reconnaitre les parcours sans cookies

post view = aveugle

firefox et safari sans cookies tiers

# Real Time Bidding



# Real Time Bidding Programmatic

---

Pantone  
Color of the Year 2014  
Radiant Orchid  
WEB:#B163A3





**MINTED**

2 concepts  
reach  
impression  
(clic)

# 3 méthodes d'achat

PPC  
CPM  
CPA



2 inventaires d'achat  
Mots-Search  
Display&Vidéo

# Inventaire publicitaire

## Premium

home, actu, saison, thème, event...

## Secondaire

articles anciens

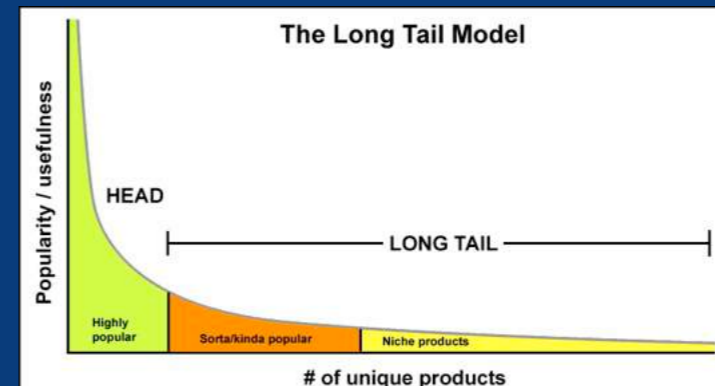
## Long Tail

articles périmés mais indexés



**GRENOBLE  
ECOLE DE  
MANAGEMENT**  
TECHNOLOGY & INNOVATION

une école  
 CCI GRENOBLE





**Achat d'espace**  
**Achat d'audience**

**4 lieux d'achat**

**Website**

**InApp / Mobile**

**InStream / Meta**

**Social**

News

Standards,  
Guidelines &  
Best PracticesResearch &  
Thought  
Leadership

Events

Learning

Certification

Public Policy

Membership

About IAB

# Getting LEAN with Digital Ad UX

10.15.15

By Scott Cunningham



# W

e messed up. As technologists, tasked with delivering content and services to users, we lost track of the user experience.

Twenty years ago we saw an explosion of websites, built by developers around the world, providing all forms of content. This was the beginning of an age of enlightenment, the intersection of content and technology. Many of us in the technical field felt compelled, and even empowered, to produce information as the distribution means for mass communication were no longer restricted by a high barrier to entry.

**LEAN**

LIGHT

ENCRYPTED

AD CHOICE SUPPORTED

NON-INVASIVE ADS

iab.  
TECH LAB

# RTB

## Ciblage + Enchère

Programmatic advertising

ADTECH (MARTECH)

Achat d'espace programmatique

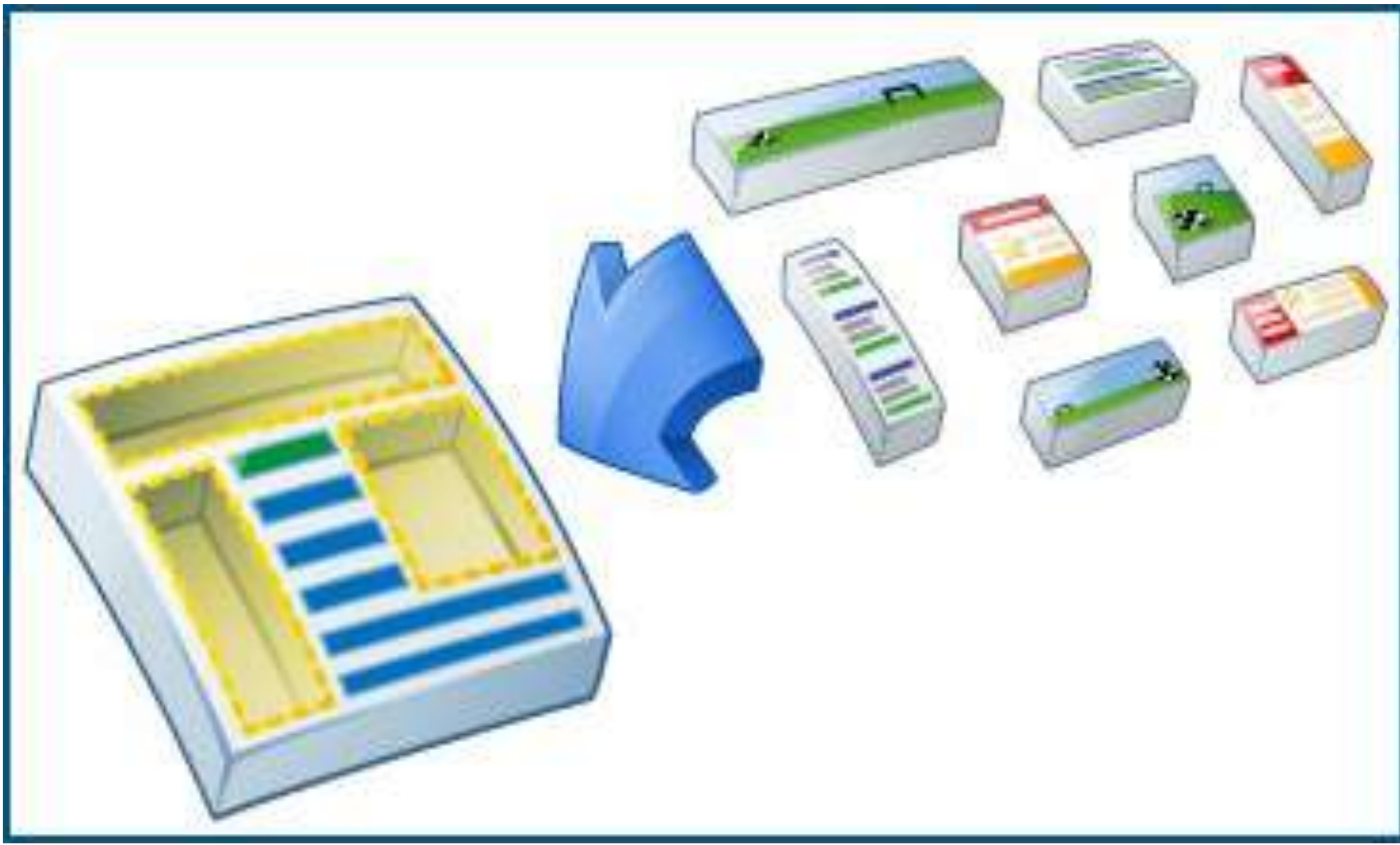
Automation

Transaction auto

RTA / RTM (temps réel)

# Real Time Bidding







# DCR data clean room

Retailers, broadcasters and walled garden platforms are among the first movers. In some cases they're partnering with independent third-party clean rooms and in others they're using clean rooms built within a walled garden. Some clean rooms enable only measurement and analytics, while others can be used to target ads.

At their most basic, data clean rooms are privacy-based technologies that allow companies to merge and match two or more first-party data sets in order to create a new audience or analytics segment informed by both data sets – but without ever allowing either side's personally identifiable information to be exposed to the other.

# IAB package

160x600



300x250



180x150



728x90



# RTB

ÉDITEURS / PUBLISHERS / SITES

AdExchange  
Sell Side Plateforme  
SupplySidePlatform

PIPE

Listing et inventaires des espaces en stock et disponibles avec les informations suivantes :

- web / mobile
- opérateur mobile / FAI
- inApp mobile / mobile
- navigateur / OS / device
- Wifi / GPS
- AdBlock (secteur, nom...)
- / choix d'un enchérisseur / règles / Filtres
- Cookie
- date heure locale
- climat
- taille et forme de l'espace
- géographie
- contenu
- anonymisation

RTB  
algorithme

1/10eme de seconde

Oui / Non  
Prix

Capping

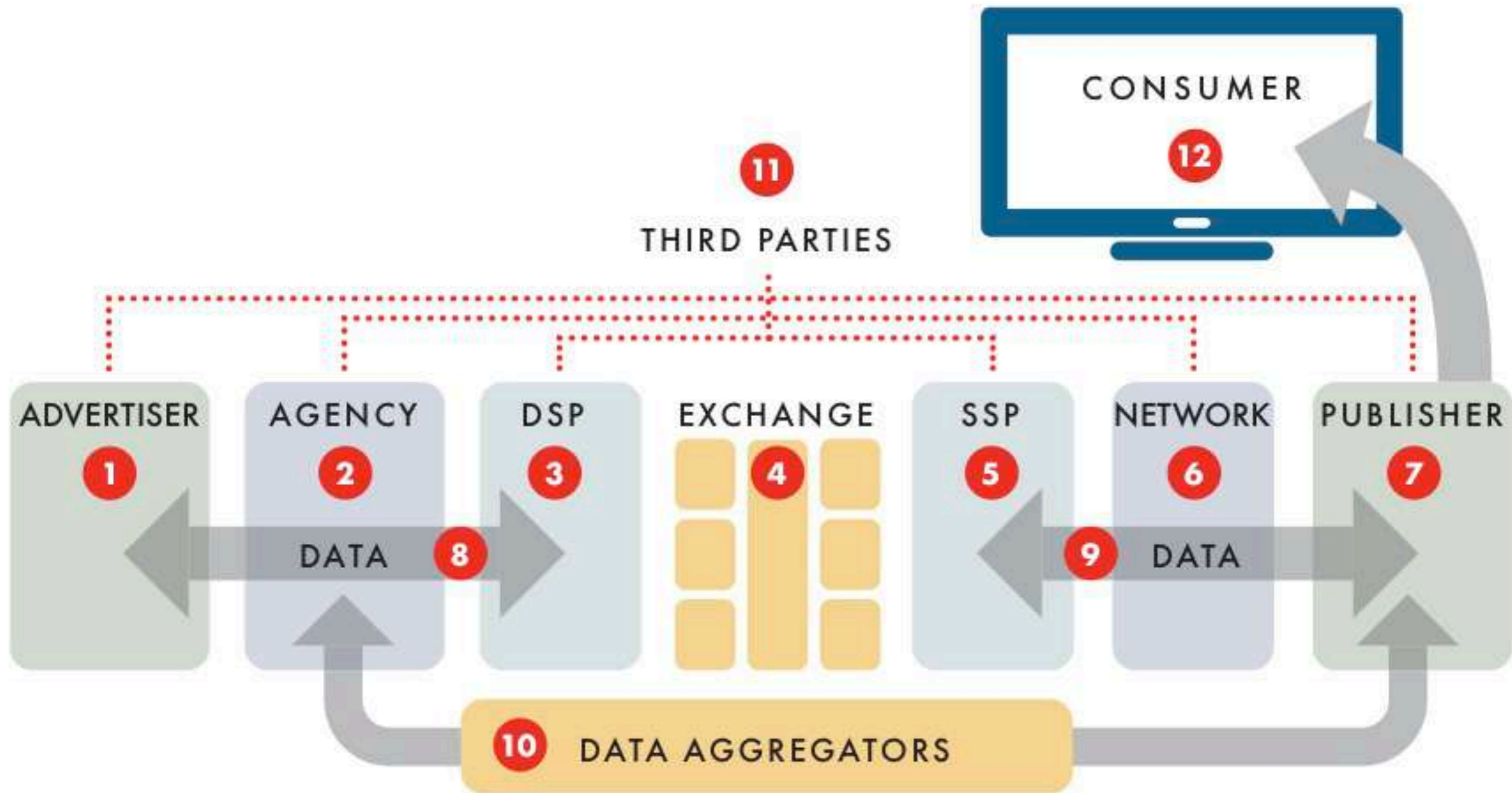
Règles

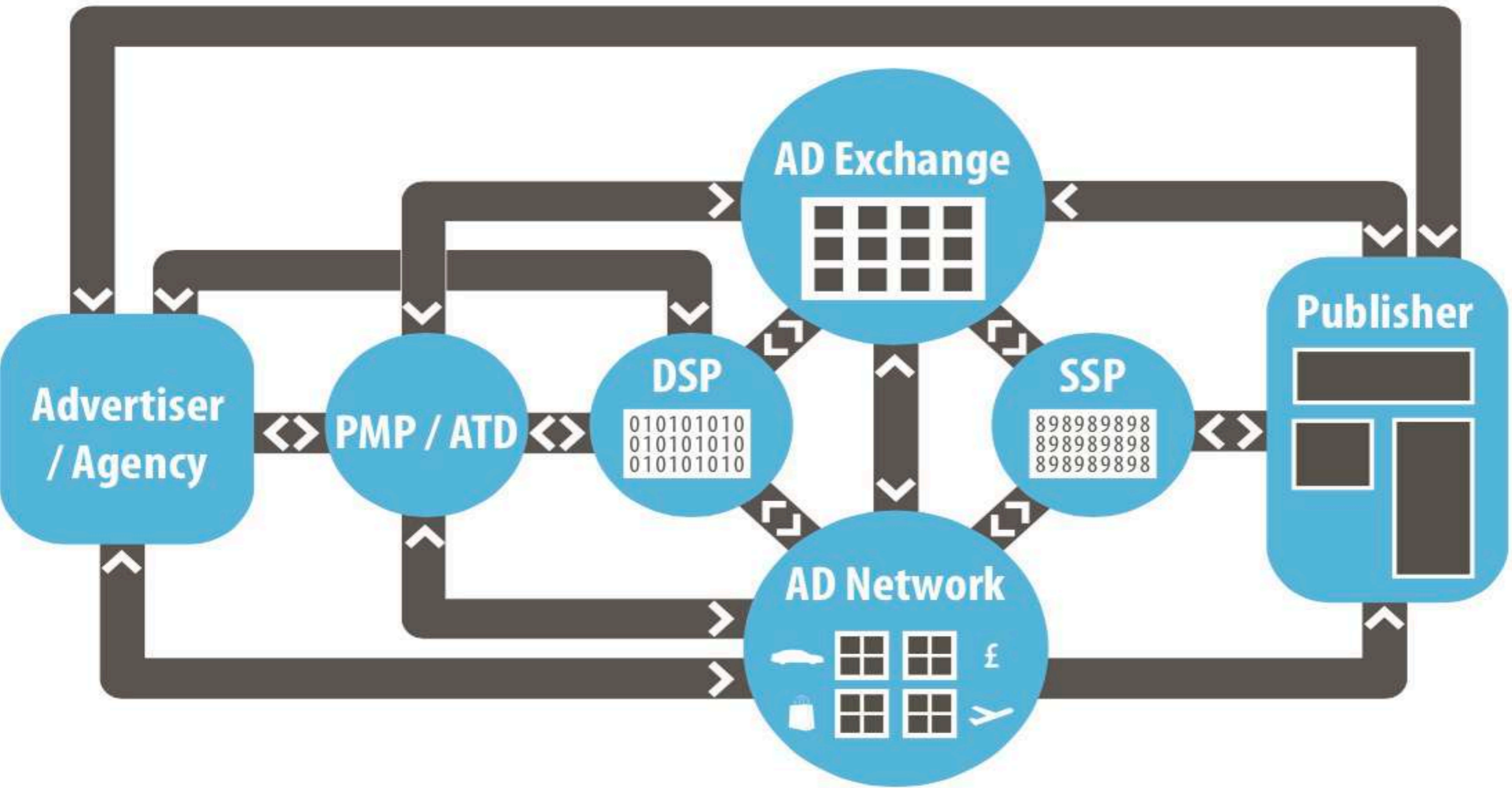
BRAIN

DemandSidePlatform

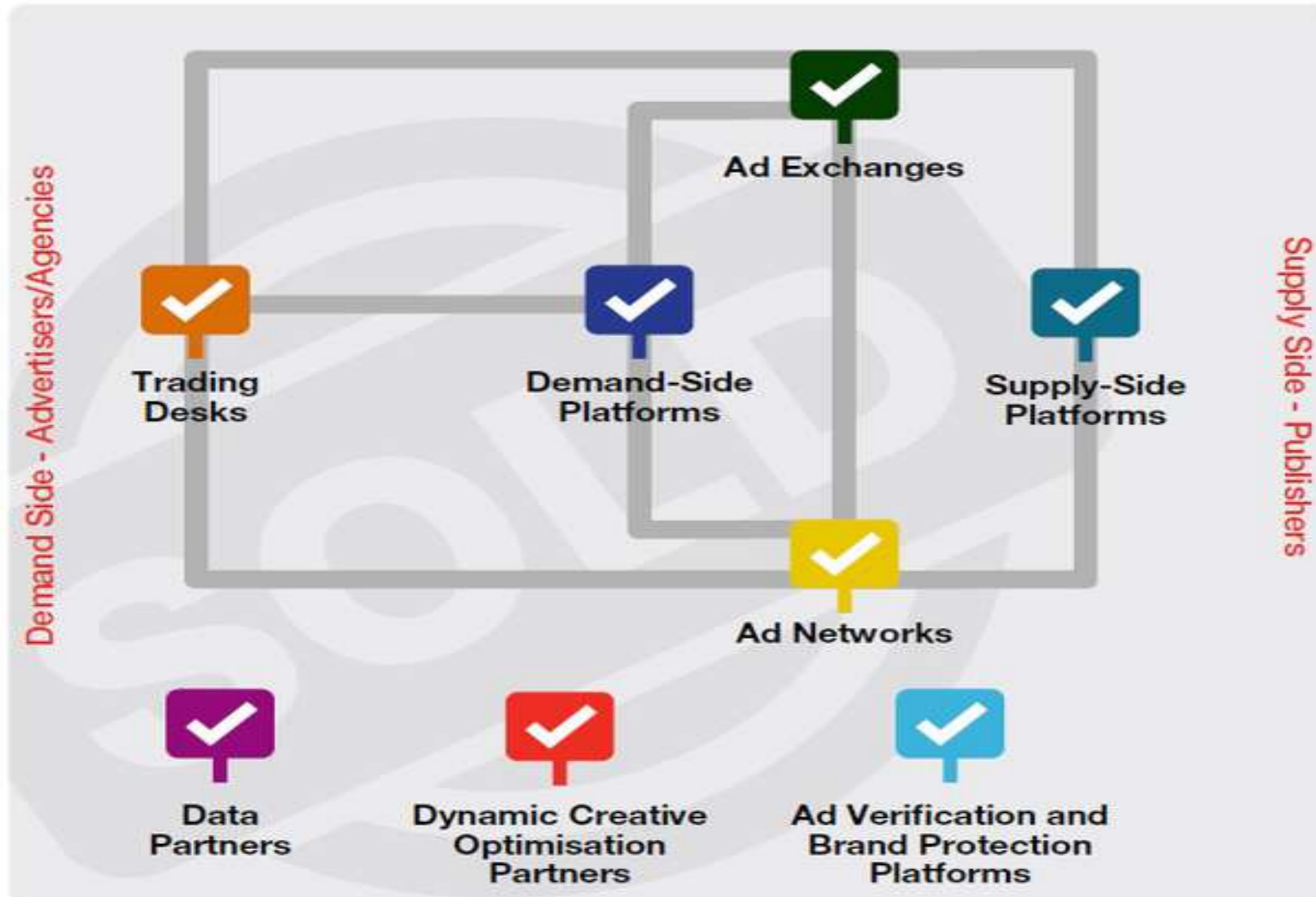
AGENCES

ANNONCEURS





# Real-Time Bidding (RTB) Ecosystem



# A PREMIUM PUBLISHER COOP

## REPPING MORE THAN 100 MEDIA BRANDS



# LES ACTEURS D'UNE MARKETPLACE RTB





# LAPLACEMEDIA

## L'OFFRE MOBILE



WEB MOBILE



320x50



320x480



Rich Media



Format standard IAB



APP



320x50



320x480



300x250 dans le flux

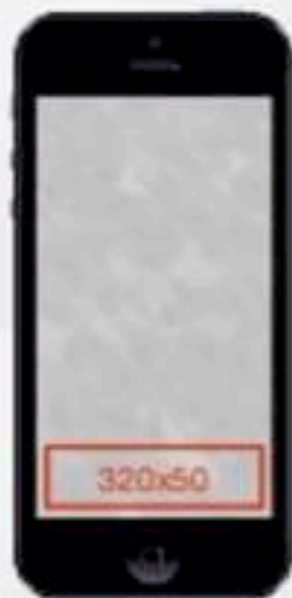


tous les standards mobiles sont accessibles en programmation

*Smartphones*



Interstitial d'ouverture  
et intrastitiel



Bannière  
Smartphone

*Tablettes*



Interstitial d'ouverture  
et intrastitiel



Bannière  
Tablette



# Moins de 120 millisecondes

**1**  
Visiteur visite page web qui utilise le RTB

**2**  
Le tag URL contenu dans la page web appelle un serveur pub

**3**  
Les données essentielles de l'utilisateur (pages vues, mots clés) sont collectées par des trading desks, tradelab, tradspotting, cookies...

**4**  
Les add exchanges entrent en lien avec les annonceurs

**5**  
Les données sont communiquées aux annonceurs connectés à la plateforme

**6**  
Les acteurs intéressés proposent une enchère au CPM

**7**  
Le SSP / Ad exchange détermine l'enchère la plus élevée qui gagne l'impression

**8**  
La publicité remportant l'enchère est affichée sur la page

## > Illustration #1 The right data to uncover the right customer

This graphic represents the full range of interest, intent and engagement data across the entire purchase funnel – in order to properly reach new, active and dormant customers with the most relevant and accurate messaging. From top to bottom, we believe there are 3 primary types of data involved in the buying process across the funnel:

**1 — Interest** (1st-party data): demographics, behavioral data from publishers, and behavioral data.

**2 — Intent** (1st-party data): high-intent data collected from social platforms (I like/I want), generic keywords (product category) and specific keywords (products, retailers)

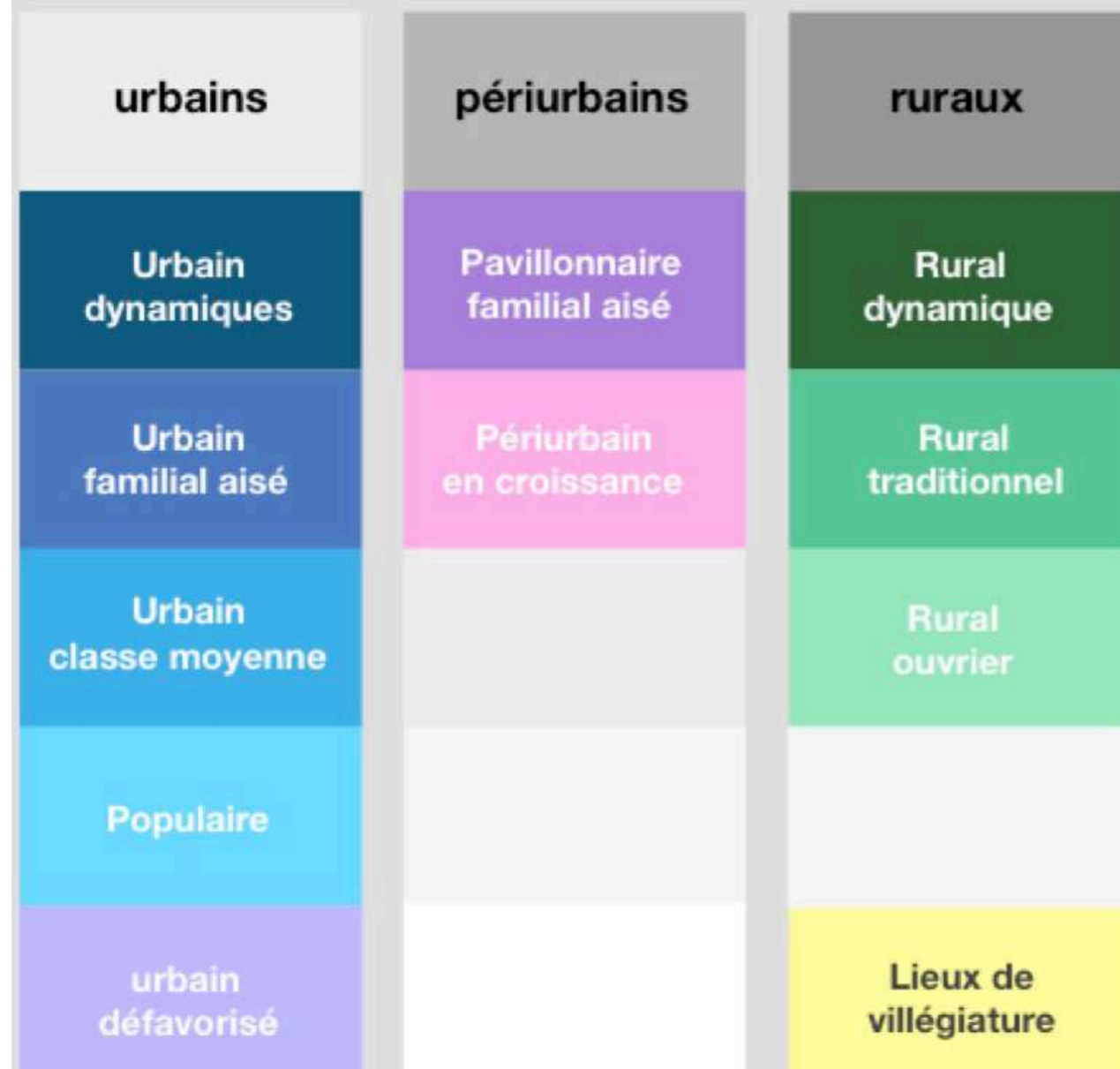
**3 — Engagement** (3rd party-data): specific searches on in-site engines, behavioral browsing and buying statistics to fuel product engine recommendations.

SEM is purely intent-based marketing and is 100% fueled by intent data – comprising only the queries entered by users on search channels. Performance display, by leveraging the most appropriate data, can now be considered a “full purchase funnel” advertising channel.



# 1

cibler des segments de population  
(en classique ou programmatique)



UNE  
PUBLICITÉ  
EST TOUT  
AUSSI  
REMARQUABLE  
QUAND  
ELLE NE  
CHERCHE  
PAS À  
FRANCHIR LA

**Bonne  
Bonne  
année.  
publicité.**

**A R P P**

autorité de  
régulation professionnelle  
de la publicité

+33 (0)1 40 15 15 40  
contact@arpp.org  
www.arpp.org

A large flock of pigeons of various breeds, including Rock Pouter and Rock Dove, is gathered on a paved plaza. The pigeons are scattered across the frame, with some standing and others pecking at the ground. The pavement is made of large, light-colored rectangular stones.

UNE  
PUBLICITE  
EST TOUT  
AUSSI  
EFFICACE  
QUAND  
ELLE NE  
PREND PAS  
LES GENS  
POUR DES

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Bonne  
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CRÉATIVE  
QUAND  
ELLE NE  
VOUS  
RACONTE  
PAS DES

**Bonne  
Bonne  
année.  
publicité.**

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# IAB

**'We messed up. As technologists, tasked with delivering content and services to users, we lost track of the user experience'**  
- SCOTT CUNNINGHAM, IAB

# CLEANING ROOM

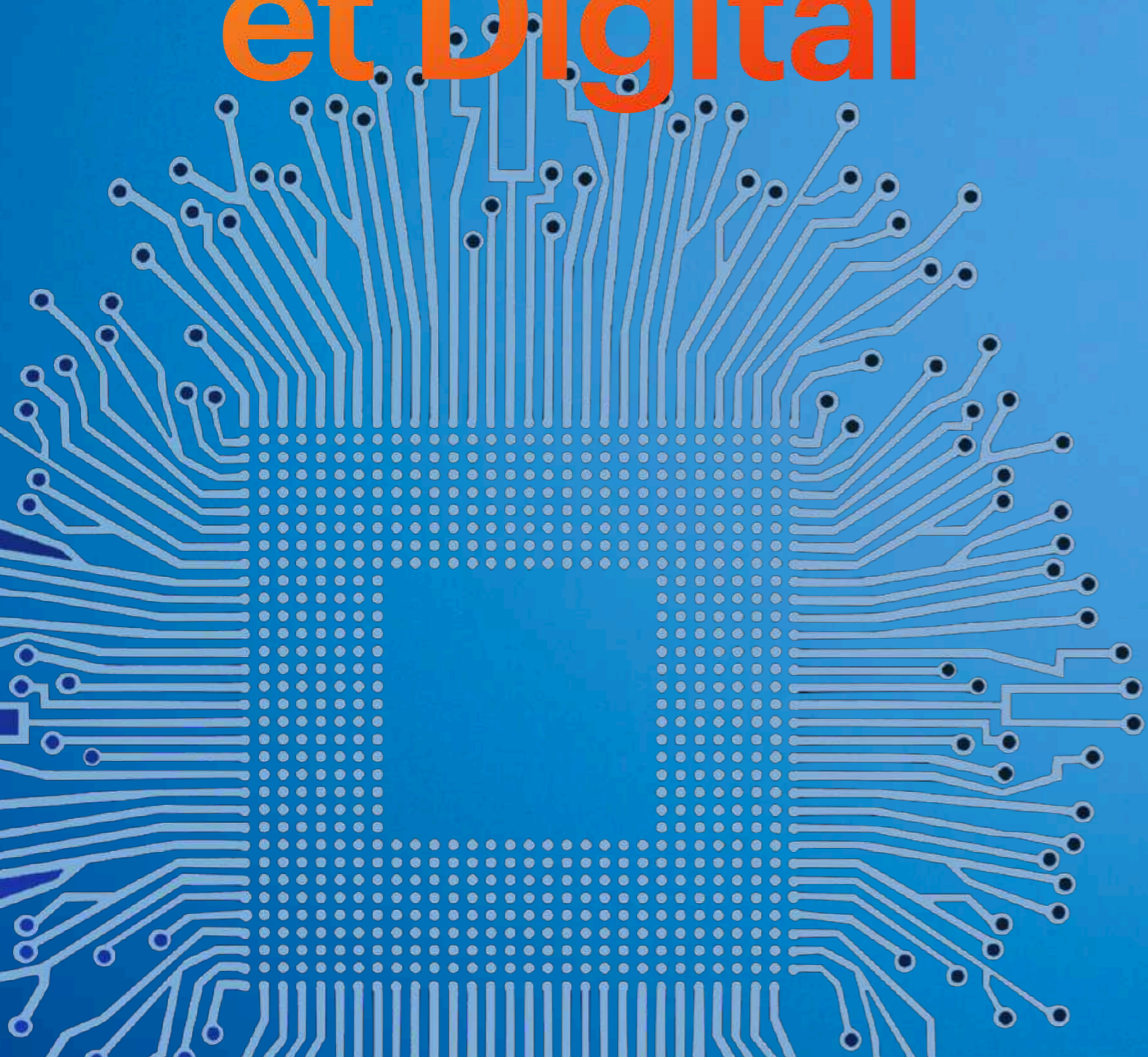
Lieu d'échange de First Party Data

## DCR data clean room

Retailers, broadcasters and walled garden platforms are among the first movers. In some cases they're partnering with independent third-party clean rooms and in others they're using clean rooms built within a walled garden. Some clean rooms enable only measurement and analytics, while others can be used to target ads.

At their most basic, data clean rooms are privacy-based technologies that allow companies to merge and match two or more first-party data sets in order to create a new audience or analytics segment informed by both data sets – but without ever allowing either side's personally identifiable information to be exposed to the other.

# Monde Numérique et Digital

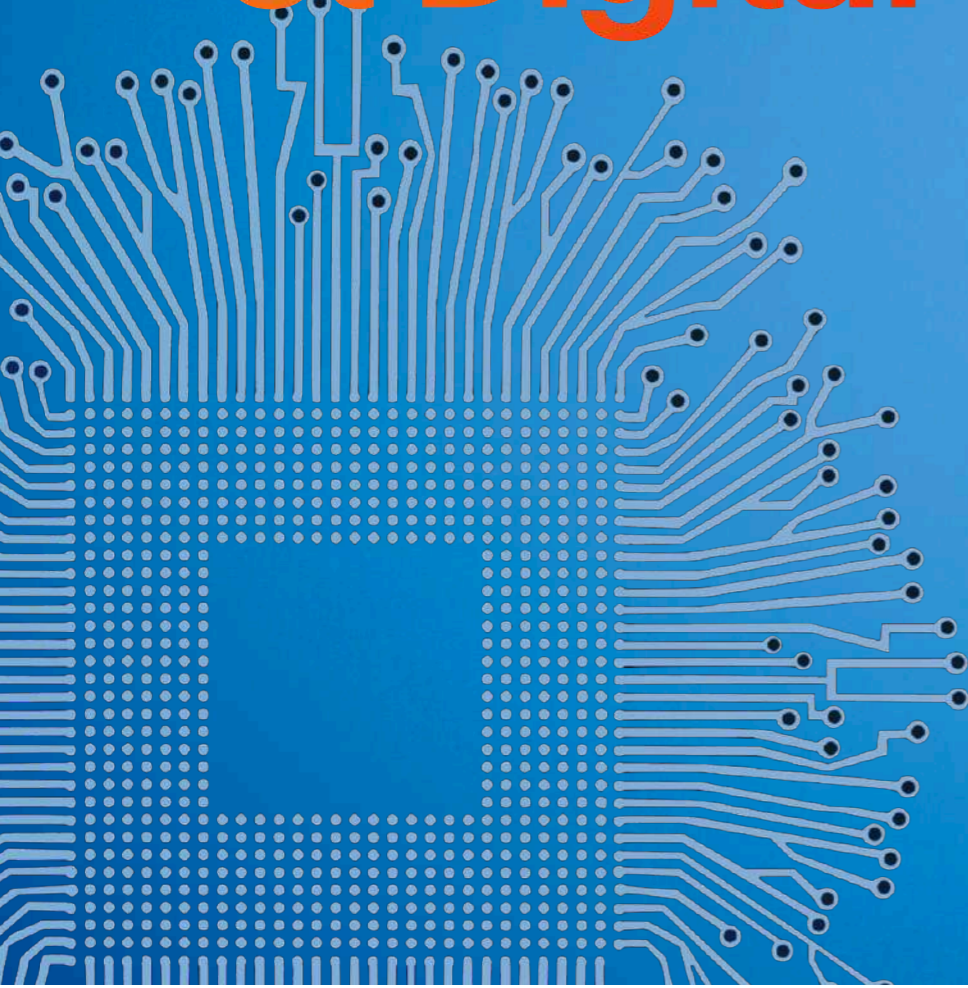


# Total Aviation Mondiale



# Monde Numérique et Digital

# Total Aviation Mondiale







# OBJECTIFS DE DÉVELOPPEMENT DURABLE

**1** PAS DE PAUVRETÉ



**2** FAIM «ZÉRO»



**3** BONNE SANTÉ ET BIEN-ÊTRE



**4** ÉDUCATION DE QUALITÉ



**5** ÉGALITÉ ENTRE LES SEXES



**6** EAU PROPRE ET ASSAINISSEMENT



**7** ÉNERGIE PROPRE ET D'UN COÛT ABORDABLE



**8** TRAVAIL DÉCENT ET CROISSANCE ÉCONOMIQUE



**9** INDUSTRIE, INNOVATION ET INFRASTRUCTURE



**10** INÉGALITÉS RÉDUITES



**11** VILLES ET COMMUNAUTÉS DURABLES



**12** CONSOMMATION ET PRODUCTION RESPONSABLES



**13** MESURES RELATIVES À LA LUTTE CONTRE LES CHANGEMENTS CLIMATIQUES



**14** VIE AQUATIQUE



**15** VIE TERRESTRE



**16** PAIX, JUSTICE ET INSTITUTIONS EFFICACES



**17** PARTENARIATS POUR LA RÉALISATION DES OBJECTIFS



  
**SUSTAINABLE DEVELOPMENT GOALS**



# B Corp

— Nous sommes fiers d'être certifiés par B CORP, la plus haute distinction décernée aujourd'hui aux entreprises qui s'engagent à faire de la responsabilité environnementale et sociale un élément central de leurs activités commerciales.

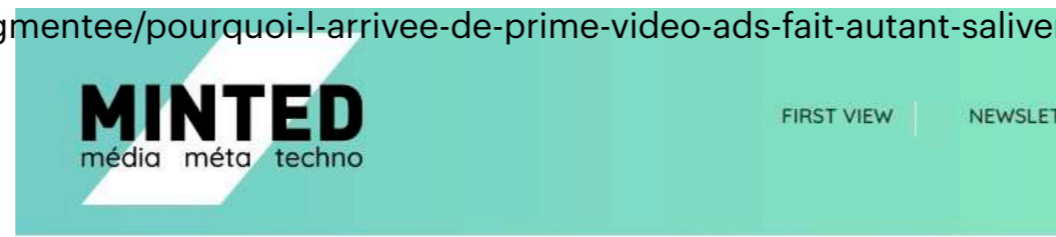
[Découvrir nos engagements](#)

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PLATEFORMES PUBLISHERS ADTECH MARKETING WEB3

ADTECH

# POURQUOI L'ARRIVÉE DE PRIME VIDEO ADS FAIT AUTANT SALIVER LES ANNONCEURS

Le 06/12/2023



par Nicolas Jaimes



- Prix, reach, data... Sur ces trois composantes clés, la nouvelle offre d'Amazon avec publicité, prévue pour le second trimestre 2024 en France, sera très compétitive. On vous dévoile tout.

“Les chaînes TV ont dû soucier à se faire.” C’est par ces mots que cet acheteur, qui préfère rester anonyme, lance notre conversation sur l’arrivée prochaine de la publicité vidéo sur Prime Video. Une prédiction qu’il est loin d’être le seul à faire, à en croire les témoignages recueillis par Minted auprès des agences médias qui ont déjà rencontré les équipes d’Amazon.

L’offre publicitaire de Prime Video, dont le lancement est prévu pour le second trimestre 2024 en France, devrait en effet réussir là où celle de Netflix a, pour l’instant, échoué : bousculer les lignes. Notre acheteur anonyme parle d’un véritable “game changer”, d’une offre qui pourrait “faire le pont entre Youtube et le monde de la TV linéaire.”

Pour la simple raison que comme, le synthétise bien, Philippe Bigot, head of media video department chez Havas Media, Prime Video Ads conjuguera “de la puissance immédiate, de la data Amazon, le tout à des CPM abordables.”

9 millions d’abonnés Prime Video accessibles aux annonceurs

Le premier argument en faveur de Prime Video Ads, c’est son reach. Un sujet sur lequel l’offre d’Amazon sera, au lancement, beaucoup plus performante que celle de ses concurrents. Tout simplement parce qu’Amazon a fait un pari que Netflix et Disney+ n’ont pas osé prendre : basculer l’intégralité de son parc d’abonnés sur l’offre avec publicités.

C’est un pari que le géant de l’e-commerce peut se permettre de prendre puisque son offre vidéo n’est qu’un pan d’une offre plus globale (beaucoup d’abonnés Prime le sont avant tout pour la livraison gratuite). L’arrivée de la pub n’aura a priori aucune incidence sur le churn des abonnés Prime (même si je suis publiphobe, je reste...

ADTECH

# ARNAUD CRÉPUT (EQUATIV) : “LES FRONTIÈRES ENTRE SSP ET DSP S’EFFACENT PROGRESSIVEMENT POUR LAISSER PLACE À DES PROGRAMMATIC DIRECT PLATFORMS”

Le 06/12/2023



par Nicolas Jaimes



- Racheté par le fonds Bridgepoint en début d’année, pour 350 millions d’euros, Equativ est notre adtech de l’année.
- Minted a rencontré le CEO du grand gagnant des Adtech Awards 2023 pour faire le point sur sa croissance aux Etats-Unis, le développement de sa curated marketplace et une rumeur d’acquisition qui est remontée jusqu’à nos oreilles.

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**Retail**



**Media**

# retail media

cookiless 3<sup>rd</sup> party

95% du trafic est anonyme

comment mesure campagne pub

AMZads solution

1/dcr = amz marketing cloud = croise FPD client FPD AMZ

2/ contextuel = achat chez amz

3/ mesure insight granulaire haut funnel bas funnel

attrib contrib

difficulté de reconnaître les parcours sans cookies

post view = aveugle

firefox et safari sans cookies tiers



## Définition Retail Media

consiste à utiliser les espaces médias des détaillants (point de vente, distributeur, retailer..) pour atteindre les consommateurs pendant leur parcours d'achat, que ce soit en magasin physique (off site) ou en ligne (on site) ■

## Définition Retail Media

formats tels que les écrans vidéo, les étiquettes numériques, les affiches interactives, les bornes, les bannières sur les sites marchands ou les newsletters.

Le retail media permet aux marques (annonceurs, industriels...) d'atteindre les consommateurs au moment même de l'acte d'achat et de les influencer dans leur choix ■



## Définition Retail Media

Pub financée par les marque (industriel annonceur) et diffusée par les distributeur (enseigne retailer) ancien stop rayon PLV leaflet catalogue affiche sur le chariot \ migre de l'affiche parking ou chariot ou rayon au mobile du client.

infinity : 17m encarté monop fran itm casino = extension audience = look alike audiences = pour optimiser plan media = open web VOL video online + display IAB + yt fb snap = precision marketing \ repetition 6 à 8 touchpoint \ persona sur comportement achat \ tjs FPD \

Carrefour links = Criteo : 'retail media platform' LiveRamp = plateforme d'insights donc de DATA = acces à la donnée en temps réel avec granularité à l'EAN au jour le jour + insight pour affiner les persona et les DSP = acces self service sur les plateforme

ON SITE = sur les websites

uplift = augmentation des ventes = sur carrefour.fr

reach mini 1 million d'impressions pour être statistique bon

construire les audience

nouvelle forme de adtech inventée par amazon en copiant google en 2010 produit sponsorisés = sponsor search =

mmm marketing mix modeling optimisation des investissements media communication



# Retail Media



dernier né de la famille  
search, publicité,  
AdTech, data (FPD)

Au milieu de plusieurs catégories

Différents points de vues du Retail Media

Pour un retailer : valorisation des assets - websites, points de vente, APP, parking, **data**...

Pour une marque/industriel : une autre façon d'annoncer, de négocier, de se développer, de connaître

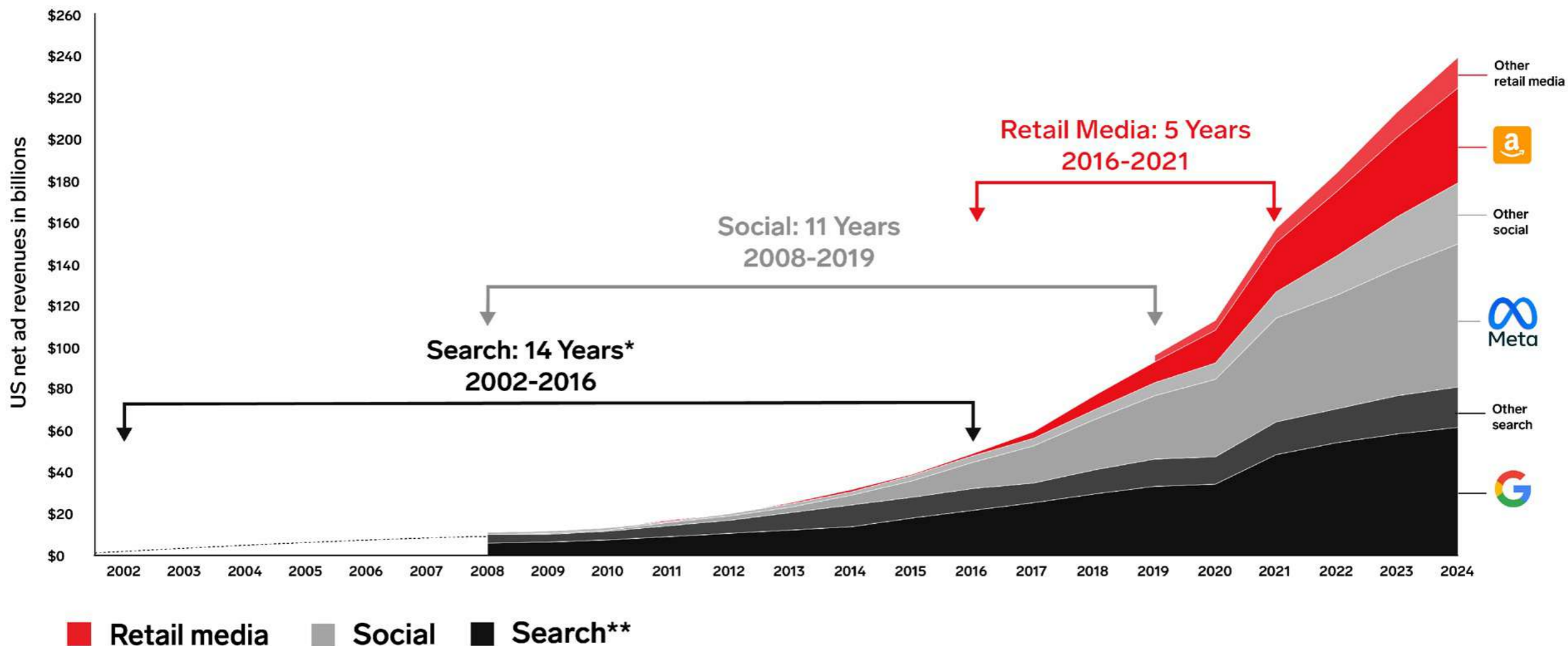
Pour les consommateurs :  
coupon, remise ■

# DCR data clean room

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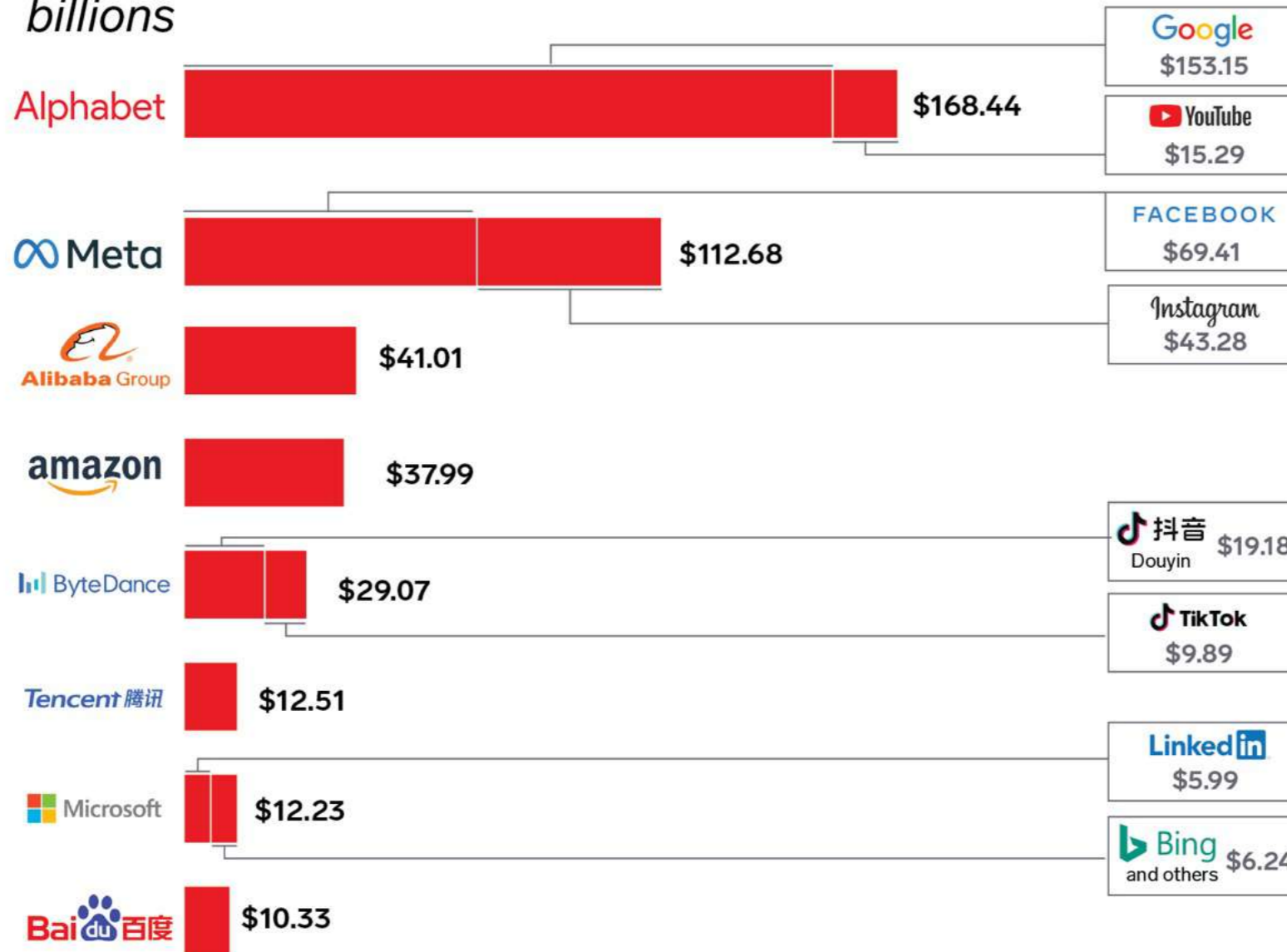
# Years For Search, Social, and Retail Media Advertising Markets to Grow From \$1 Billion to Over \$30 Billion



Note: \*Using IAB's estimates of \$900 million in search advertising revenues in 2002. \*\*excludes search ad revenues from retail media advertising  
 Methodology: Estimates are based on the analysis of various elements related to the ad spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers, and other industry leaders.  
 Source: eMarketer, Oct 2022

# Companies With Over \$10 Billion in Net Digital Ad Revenues Worldwide, 2022

billions

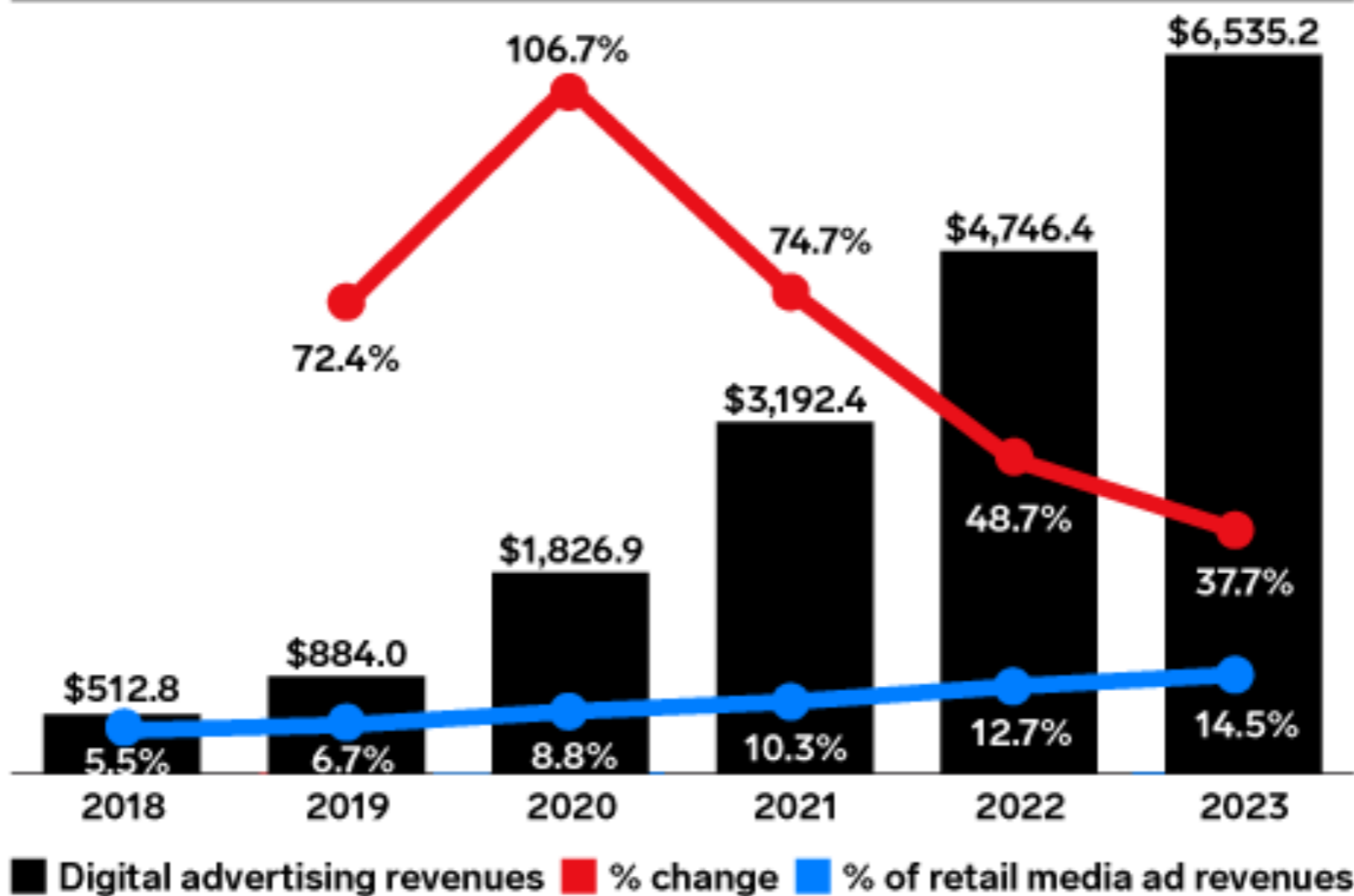


Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites; Alibaba total includes Youku Tudou; ByteDance total does not include smaller properties inside China such as Toutiao and Baixe

Source: eMarketer, Oct 2022

## US Retail Media Off-Site Digital Advertising Revenues, 2018-2023

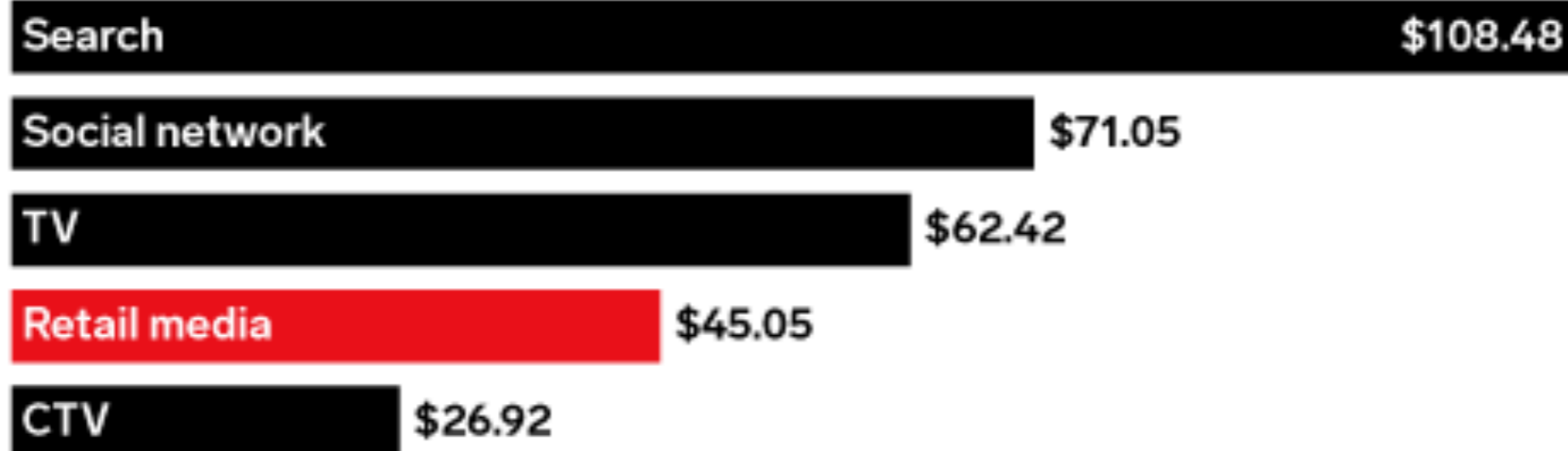
millions, % change, and % of retail media ad revenues



Source: eMarketer, Oct 2022

## US Connected TV (CTV), Retail Media, TV, Social Network, and Search Ad Spending, 2023

billions

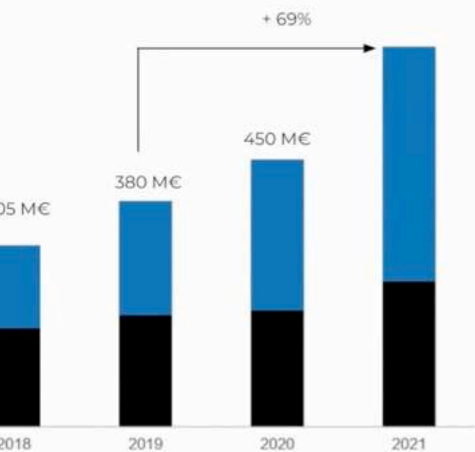


*Note: search ad spending includes contextual text links, paid inclusion, paid listings, and SEO; social network ad spending includes paid advertising appearing within social networks, social network games, and social network apps; TV ad spending includes broadcast TV (network, syndication, and spot) and cable TV; excludes digital; retail media ad spending includes digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); CTV ad spending includes digital advertising that appears on CTV devices*

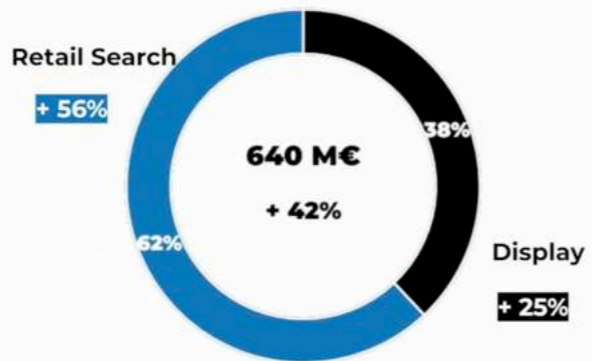
*Source: eMarketer, Oct 2022*



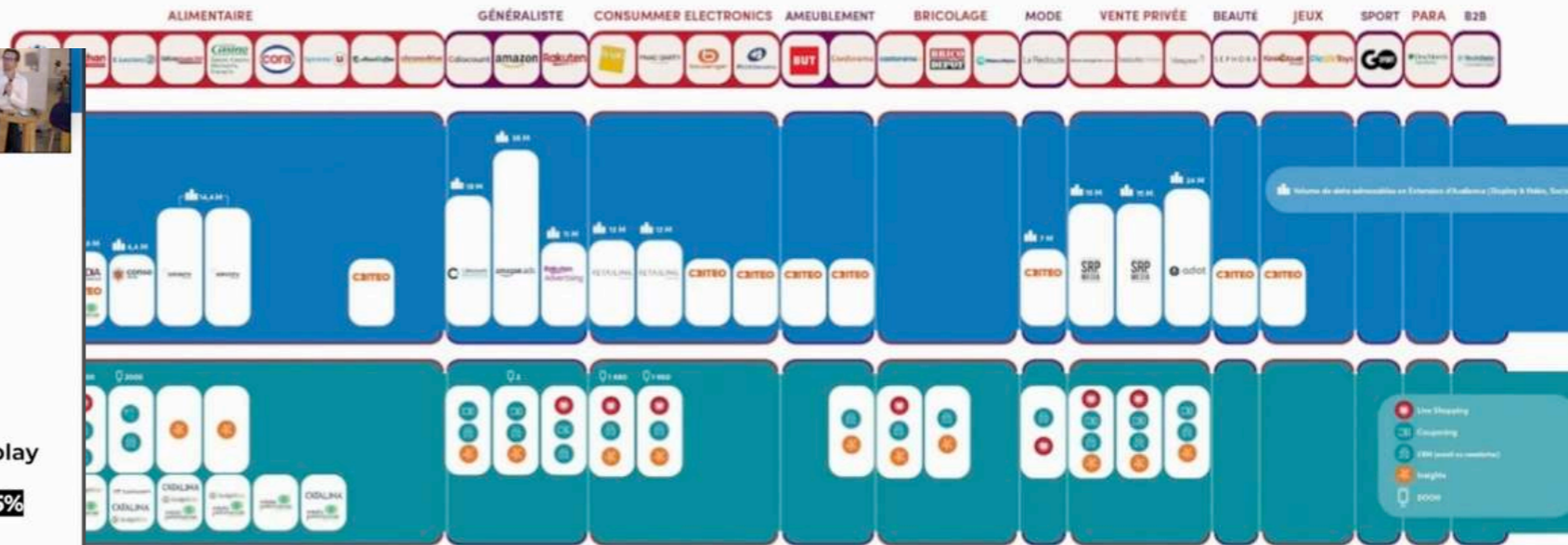
# Porte dynamique en France pour 2021



## Retail Media : évolution 2021 vs 2020

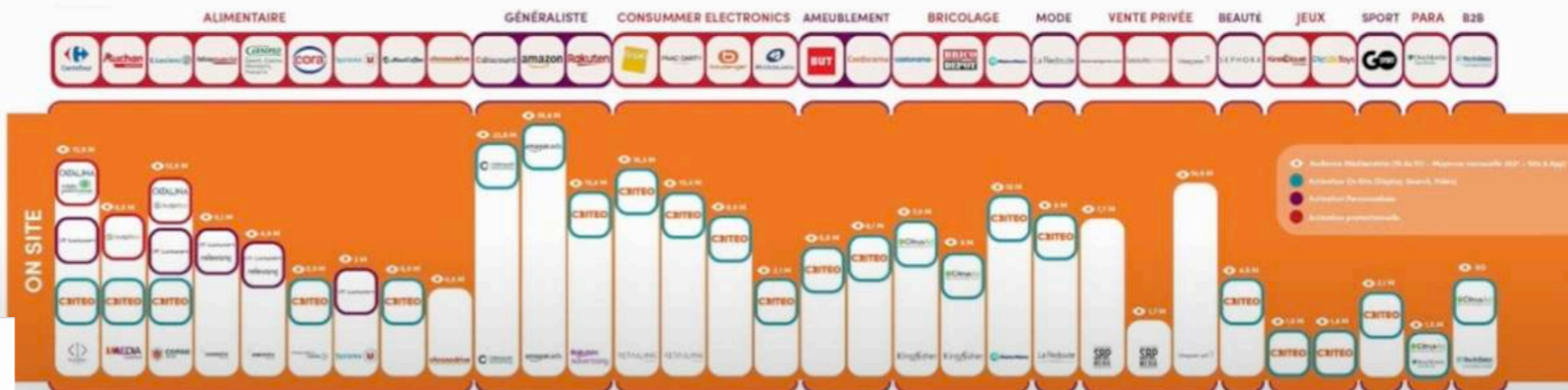


## OFF SITE : Activation Media en Dehors du site Retailer



### AUTRES FORMATS : live shopping, DOOH, Activation In Store,...

## ON SITE : Activation Media sur le site du Distributeur / e-Commerçant / Pure Player



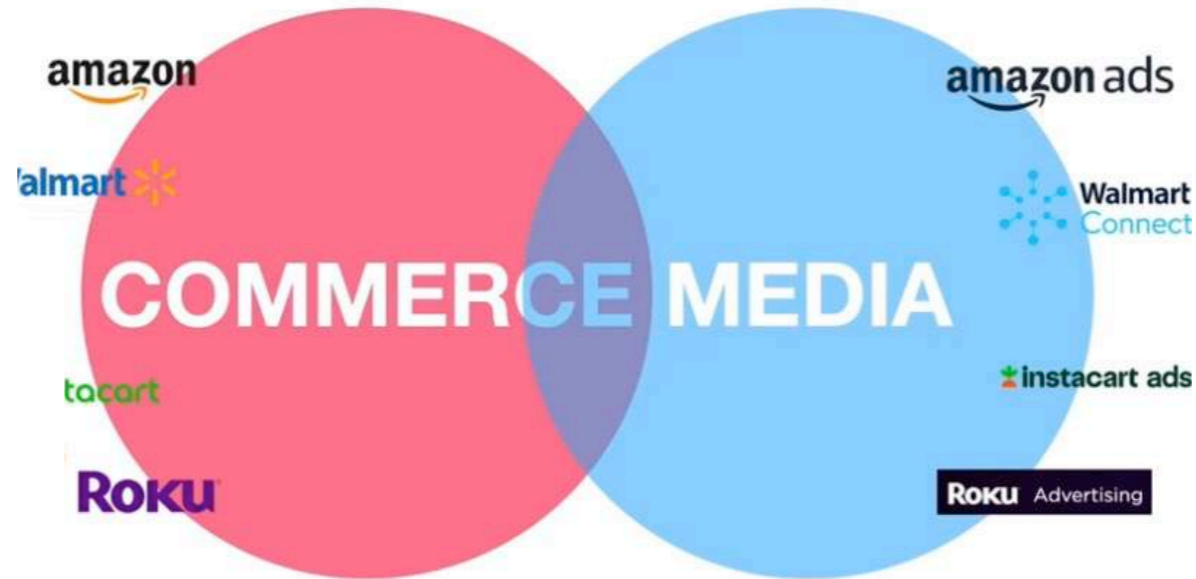
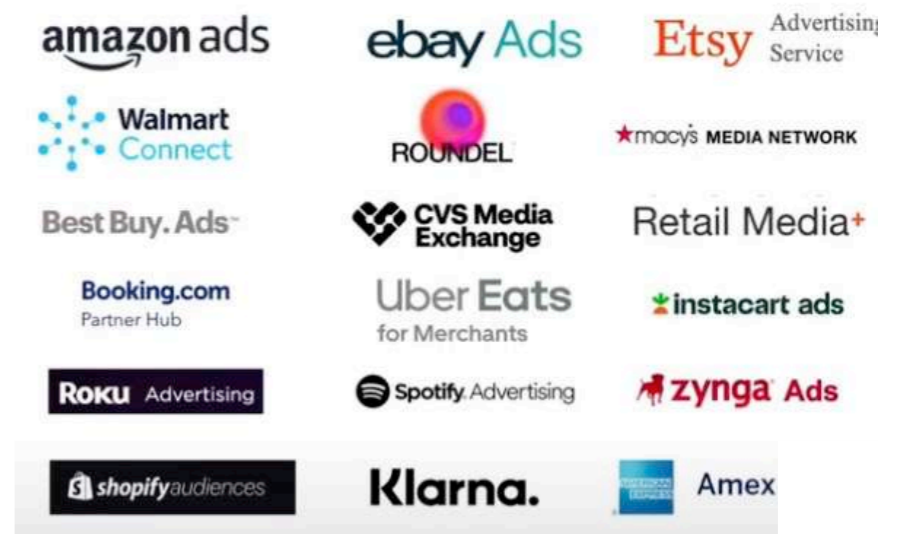
### Rebranding

### Lancement

### Rachat



# EVERYONE IS AN AD NETWORK



# Les principes directeurs d'Amazon Ads nous aident à créer des solutions durables



## #1 Confiance client

Créer des solutions marketing pour acquérir la confiance des clients durablement

**amazon ads**  
Guiding Principles



## #2 Performance Annonceur

Optimiser nos méthodologies et tirer parti de nos signaux 1P pour continuer d'améliorer les résultats

# Notre Vision

**Le futur de l'AdTech: l'IA au service de la prise de décision informée et transparente, fondée sur des signaux durables et sécuritaires de navigation, d'achat, et de streaming**

# Utiliser des solutions pertinentes et durables pour alimenter vos stratégies média dans un environnement cookieless



1

Audiences  
personnalisées  
et modélisée

2

Audiences  
contextuelles

3

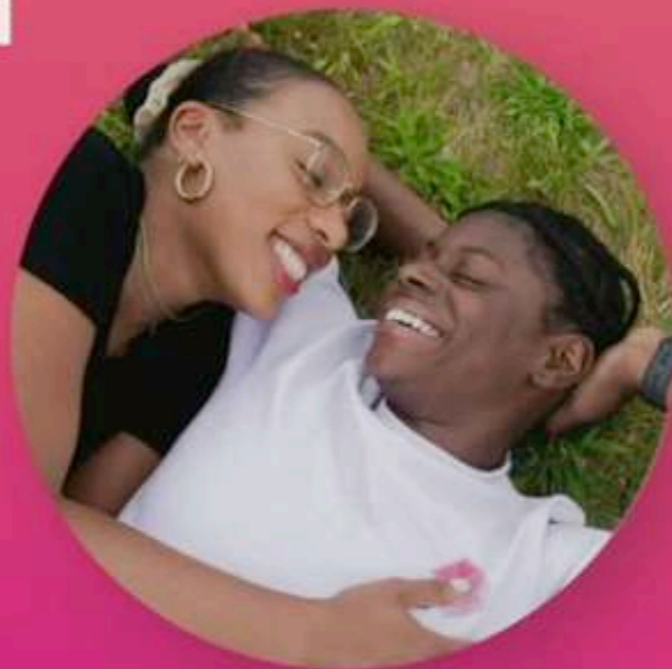
Mesure  
avancée

Jusqu'à +30% d'augmentation de couverture

# Amazon Marketing Cloud

## Des insights pour informer l'optimisation de vos campagnes

Solution Clean Room sécurisée,  
garantissant l'intégrité des données  
personnelles, hébergée sur le Cloud.



**Une marque CPG a  
utilisé Shopping  
Insights pour  
comprendre et  
optimiser la  
*Customer Lifetime  
Value (CLV)* du client**

Impact de l'activation publicitaire sur les  
Exposés vs. non Exposés

**+50%**

Dépenses  
moyenne

**+41%**

Taux  
d'engagement

**+10%**

Taux de  
conversion

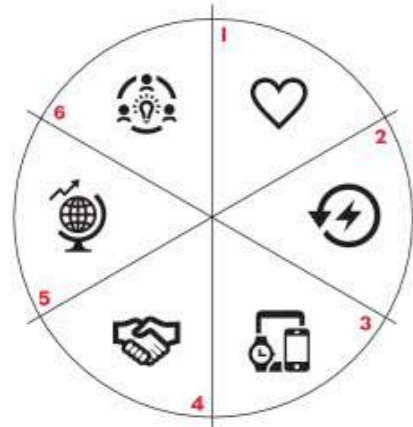
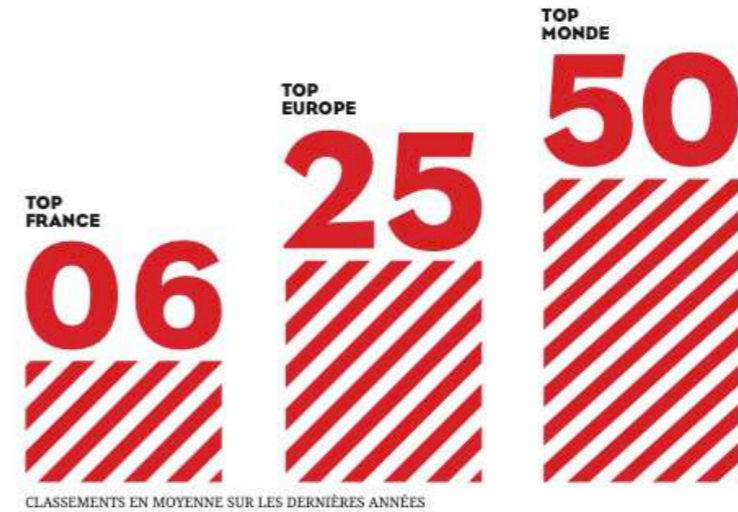
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**Act  
Think  
Impact**

**G**

# L'école en quelques chiffres.



- 1 SANTÉ ET BIEN-ÊTRE
- 2 ÉNERGIE ET CHANGEMENT CLIMATIQUE
- 3 TRANSFORMATION DIGITALE
- 4 ÉCONOMIE DU PARTAGE
- 5 CÉOPOLITIQUE ET ENTREPRISES
- 6 ENTREPRENEURIAT

6 EXPERTISES DE RECHERCHE

- CHAIRE PAIX ÉCONOMIQUE, MINDFULNESS, ET BIEN-ÊTRE AU TRAVAIL
- CHAIRE TALENTS DE LA TRANSFORMATION DIGITALE
- CHAIRE FERRE FEMMES ET RENOUVEAU ÉCONOMIQUE
- CHAIRE ANOSMIE : RENDRE VISIBLE L'INVISIBLE
- CHAIRE PUBLIC TRUST IN HEALTH
- CHAIRE TERRITOIRES EN TRANSITION

6 CHAIRES





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Act  
Think  
Impact

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**@kratiroff**

