

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

**SEASON 03  
EPISODE 03**

MARKETING

**1** Tools for projects / Persona / Journey

**2** UX CX / Digital Plan / Digital Pillars / Demo day

**3** SEARCH SERP UX

**4** SEO+SEA+ASO+SMO+Local+retail media

**5** Ecommerce / STRATEGY / PLAN

**6** PLG HOOK FLY-WHEEL PLATFORM

1  
2  
3

102	
99	
94	
96	
85	

SparcAgency.com

just do it better

FastnAgency.com

BRIDGING THE GAP TO  
DIGITAL SUCCESS FOR EVERY  
BUSINESS



ChamsPub.com

why not

SheLeads-Company.com for&by women



HadikLagence.com

strategy that deliver



marketing

**create value**

**for the ecosystem**

**for the client,**

**and the company**

digital marketing

Use of screens

(web, mobile, networks,

DOOH, metavers)

and data to bring greater

personalization and

satisfaction to users and

customers

**Plan**

**providing**

**all the means**

**to achieve**

**an objective**

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.

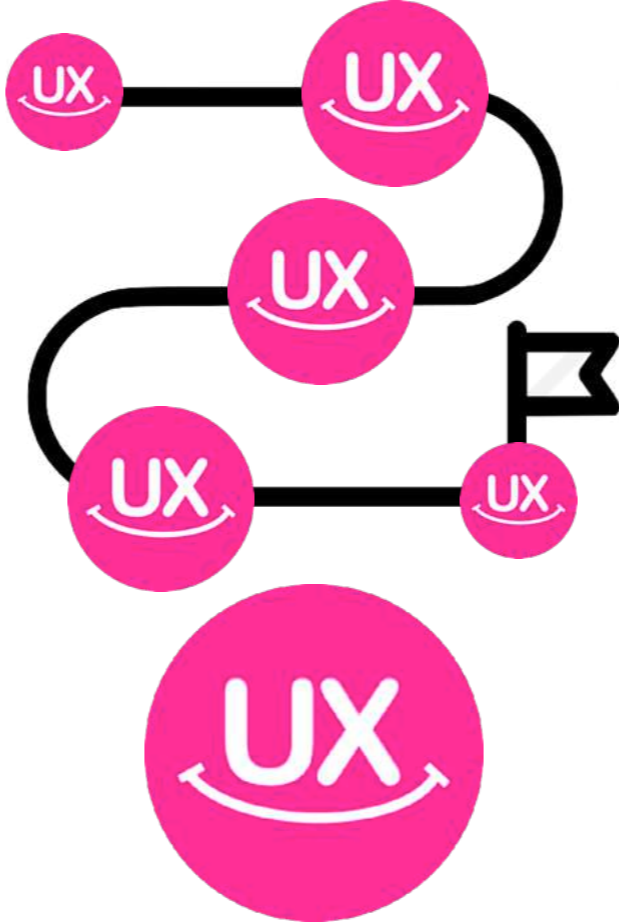
**DIGITAL  
PILLARS**



# 1



# 2



# 3

0110  
1001  
1010

**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*



AAARRR

*TUNNEL FUNNEL ENTONNOIR PIPELINE*



A

A

A

R

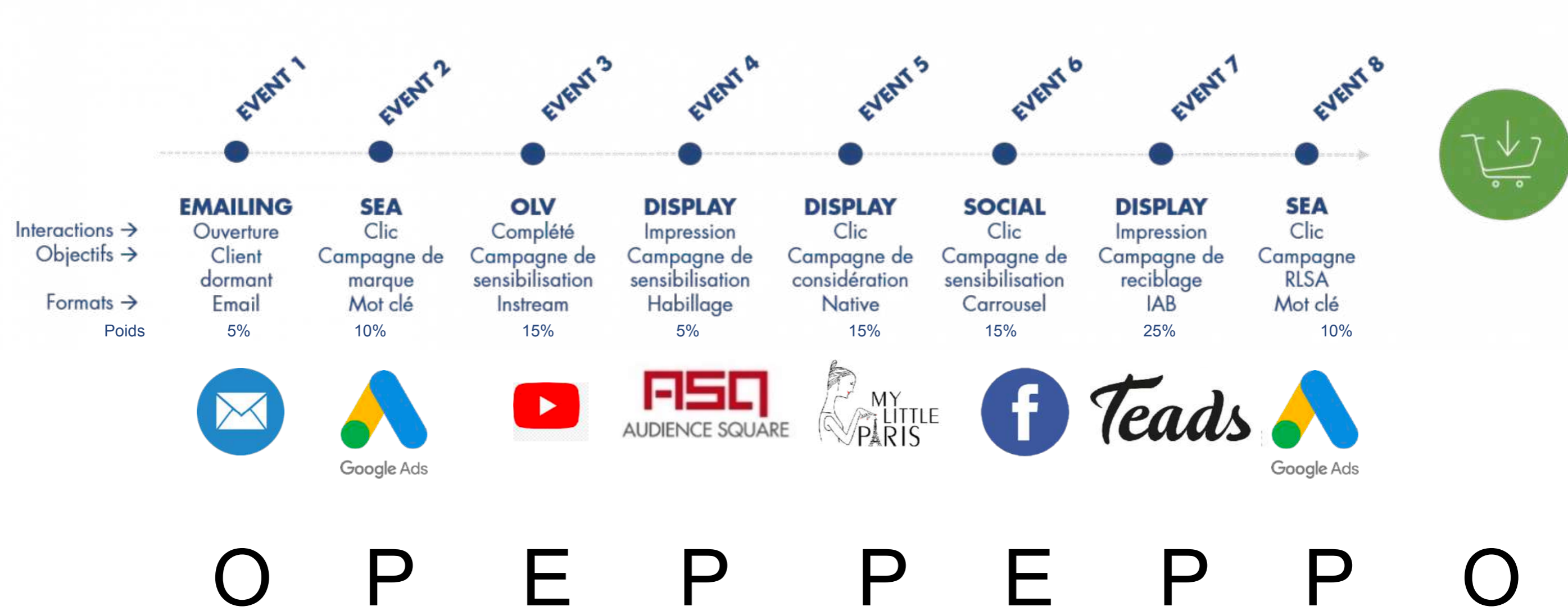
R

R €

Marketing Attribution  
vs. Contribution

Last customer  
interaction ?

# Contribution



**PAID  
OWNED  
EARNED  
SHARED**

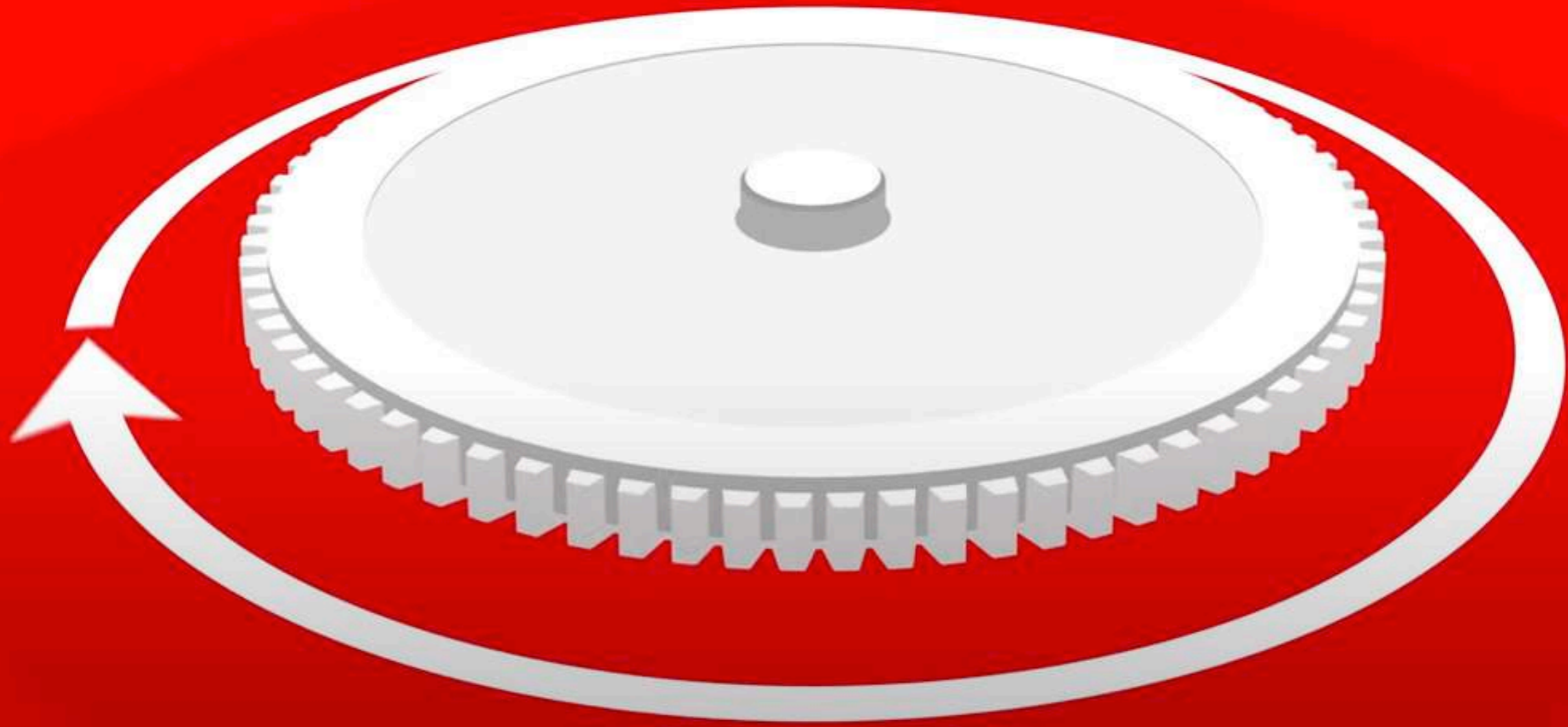
**marketing  
média**

BRAND CONTENT

//vs.

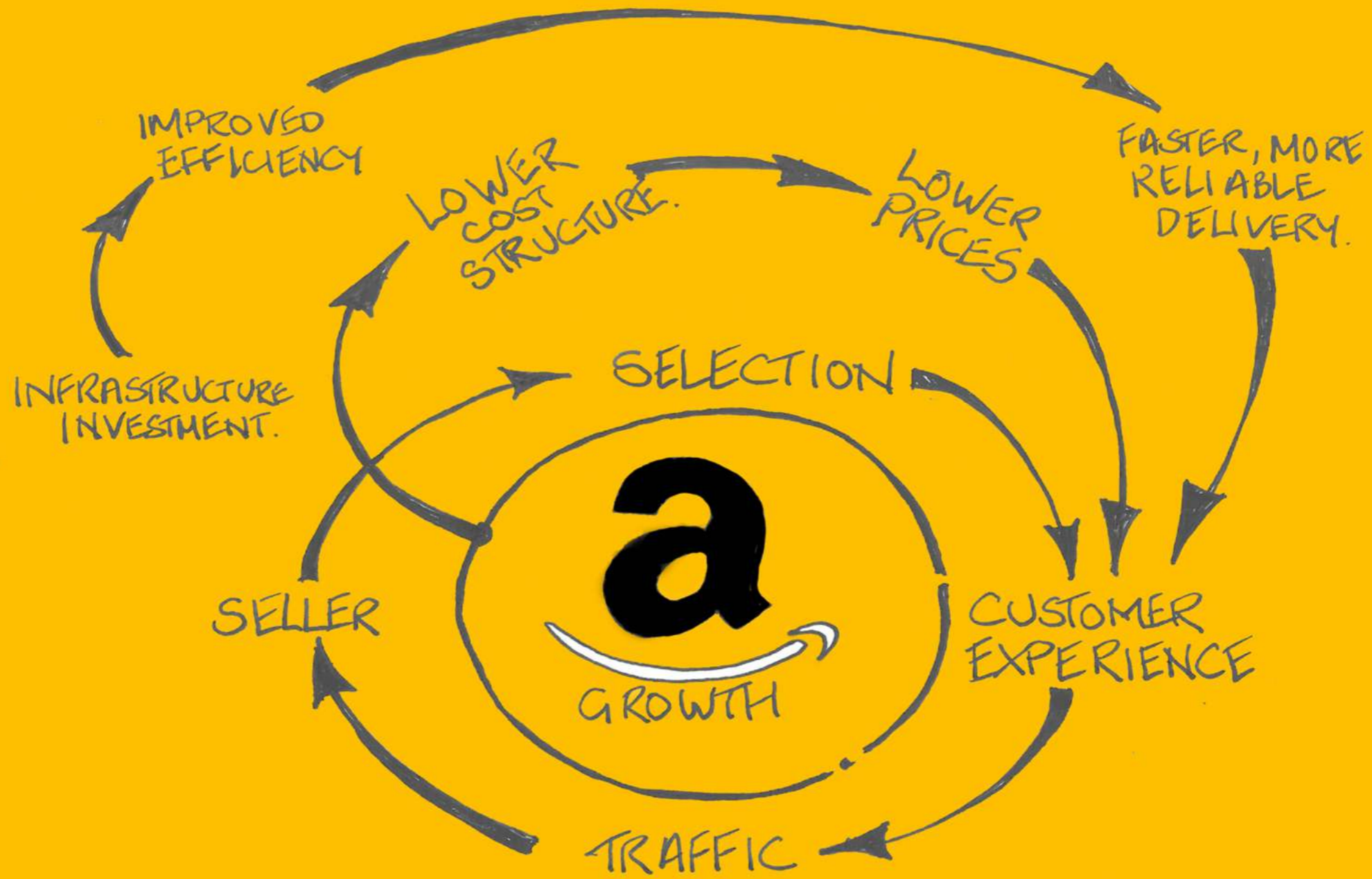
content strategy



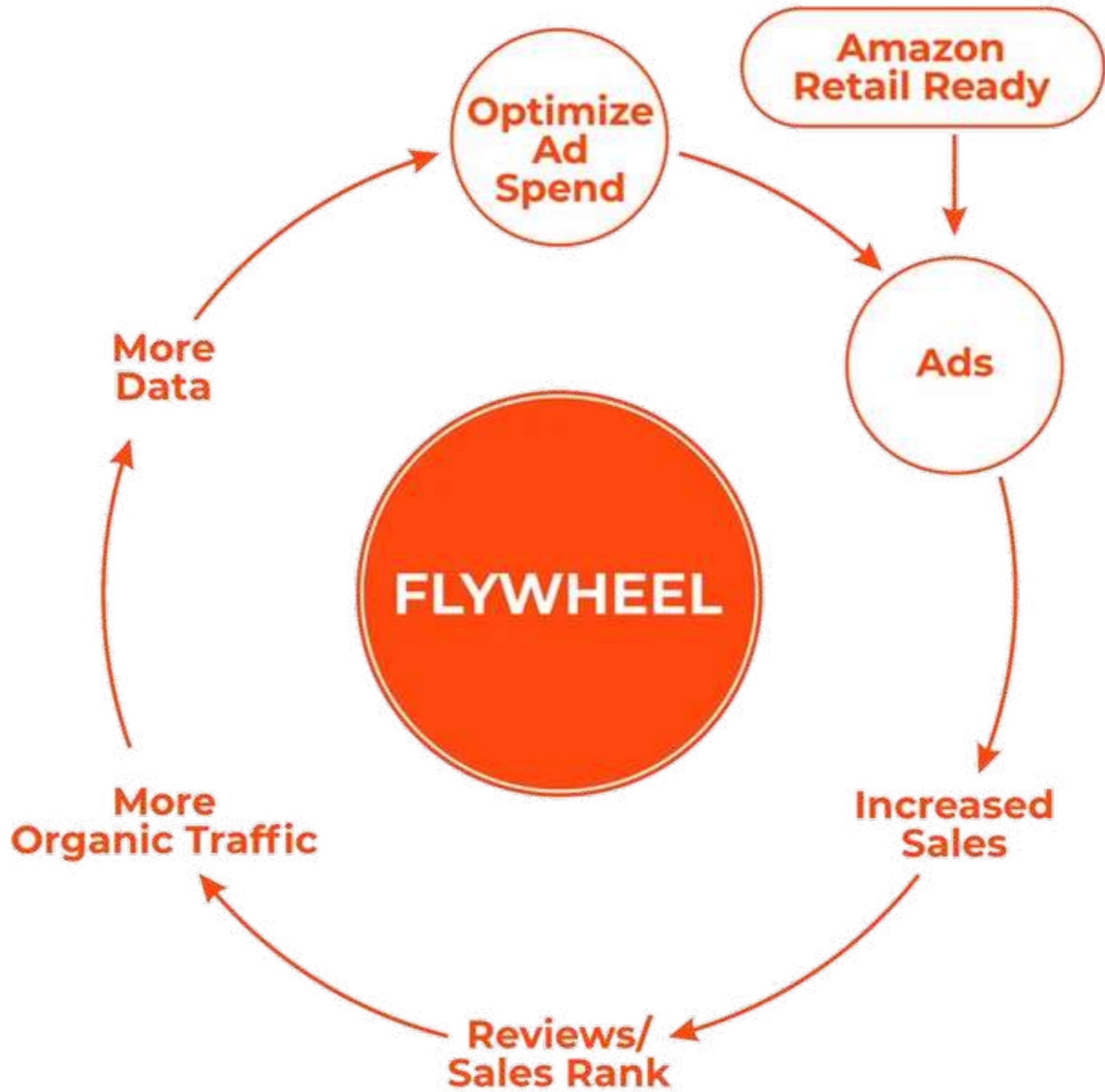


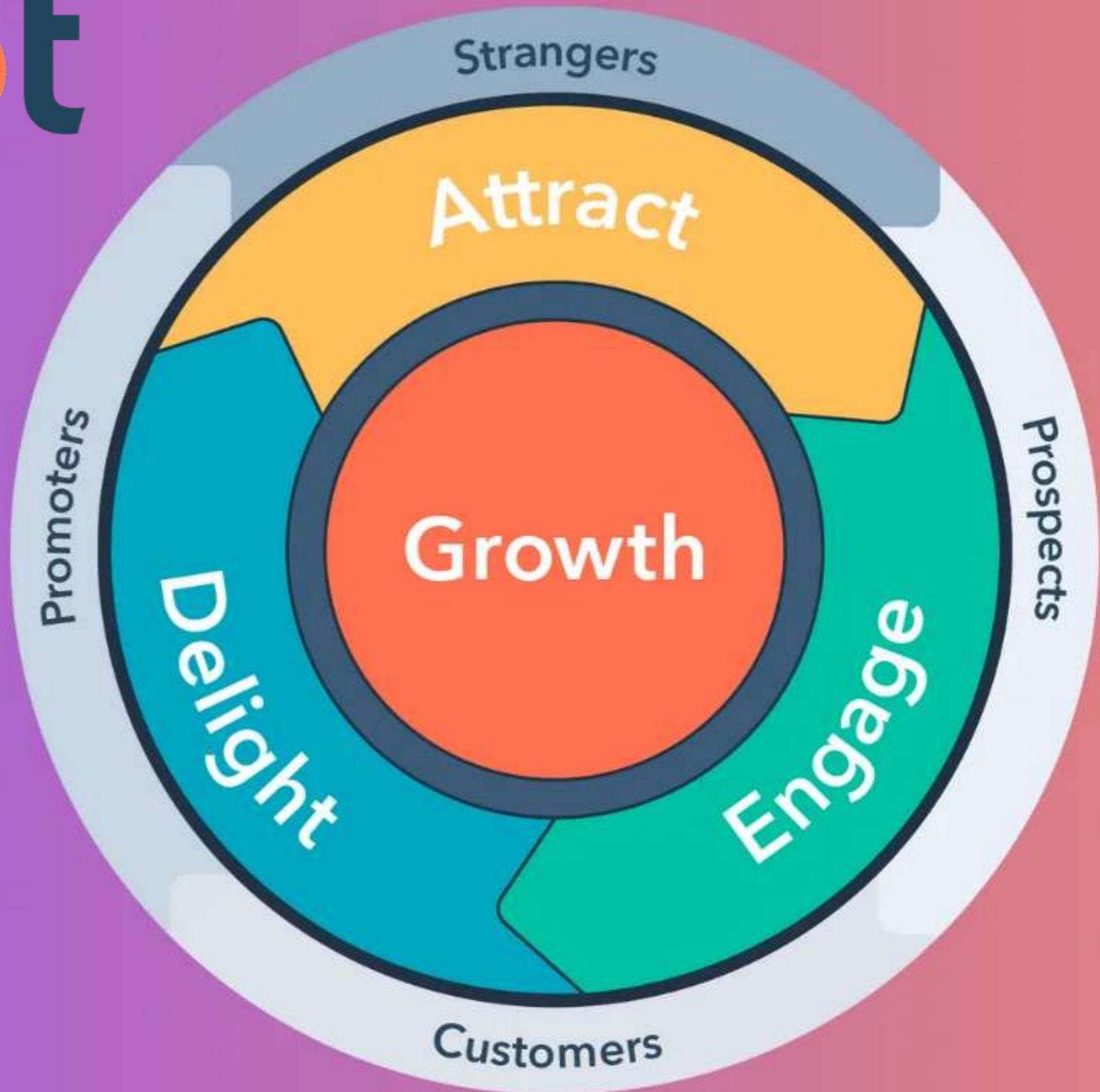
# FLYWHEEL

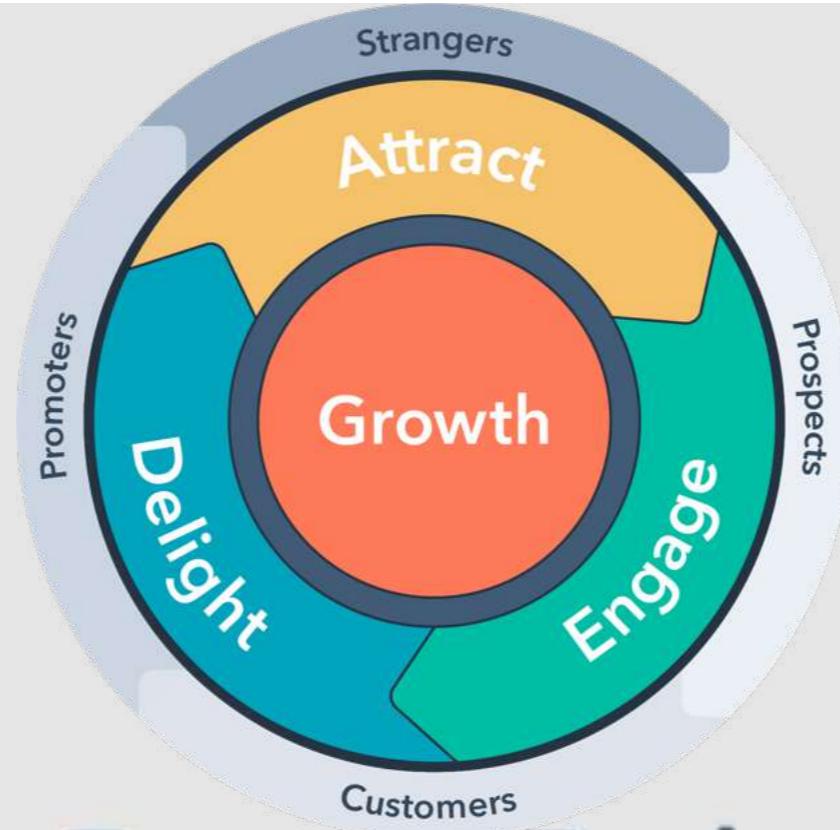




# Amazon Flywheel & The Virtuous Cycle Model







## Attract Tools

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- Ads
- Video
- Blogging
- Social media
- Content strategy

## Engage Tools

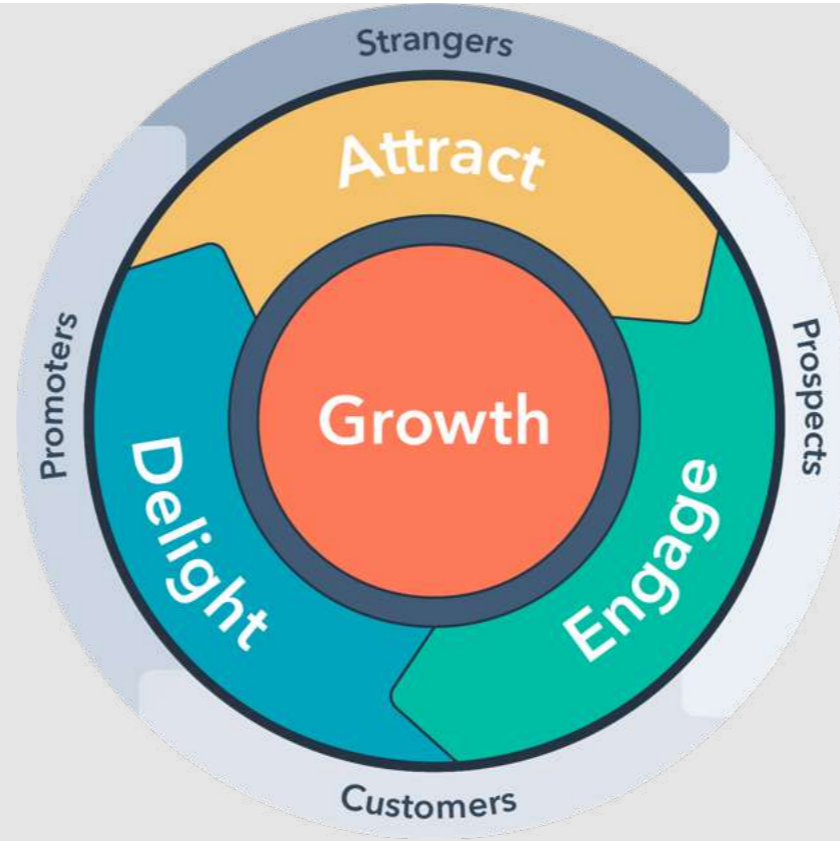
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- Lead flows
- Email marketing
- Lead management
- Conversational bots
- Marketing automation

## Delight Tools

---

- Smart content
- Email marketing
- Conversations inbox
- Attribution reporting
- Marketing automation



## Apply the FLY WHEEL to your GEM MSD master :

---

- 1:
- 2:
- 3:

Completely Free &amp; Online

# All Courses & Certifications

Stay sharp. Learn the latest business trends from leading experts.

Categories ▾

Content Type ▾

Duration ▾

HubSpot Software ▾

Levels ▾

Language ▾

Show only certifications

OFF

Filtered by marketing X

## HubSpot Marketing Hub Software

CERTIFICATION COURSE  
11 lessons 4:44 hoursPlease note that accessing the educational resources, including videos, qu... [Read more](#)

Start certification

## HubSpot x LinkedIn Ambassador Program

CERTIFICATION COURSE  
1 lesson 4 minutesThe HubSpot x LinkedIn Ambassador Program is an immersive seven-week progra... [Read more](#)

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## Email Marketing Software

CERTIFICATION COURSE  
12 lessons 3:42 hoursUnlock the power of email marketing with HubSpot's Email Marketing Software... [Read more](#)

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## AI for Marketers

SHORT COURSE  
6 lessons 2:58 hoursLearn to use artificial intelligence (AI) to ramp up your marketing strateg... [Read more](#)

Start course

## CRM Data Migration Certification

CERTIFICATION COURSE  
7 lessons 5:55 hoursNote: This is a Partner Course only. Discover best practices for data migra... [Read more](#)

Start certification

## AI for Marketers

SHORT COURSE  
6 lessons 2:58 hoursLearn to use artificial intelligence (AI) to ramp up your marketing strateg... [Read more](#)

Start course

## CMS Data-Driven Content

SHORT COURSE  
5 lessons 3:00 hoursAs a developer, you're responsible for creating websites that offer seamles... [Read more](#)

Start course

## Service Hub Demo Certification

CERTIFICATION COURSE  
9 lessons 4:53 hoursSay goodbye to standardized click-through demos for your prospects. Instead... [Read more](#)

Start certification

## Email Marketing

CERTIFICATION COURSE  
9 lessons 3:54 hours<p>Develop a holistic approach to email marketing with HubSpot Academy's Em... [Read more](#)

Start certification

## Social Media Marketing Certification II

CERTIFICATION COURSE  
6 lessons 3:21 hoursLearn advanced social media techniques to build your audience in HubSpot Ac... [Read more](#)

Start certification

## Solutions Architecture Foundations

CERTIFICATION COURSE  
1 lesson 2:04 hoursGain the knowledge to evaluate the value of embedding solutions architectur... [Read more](#)

Start certification

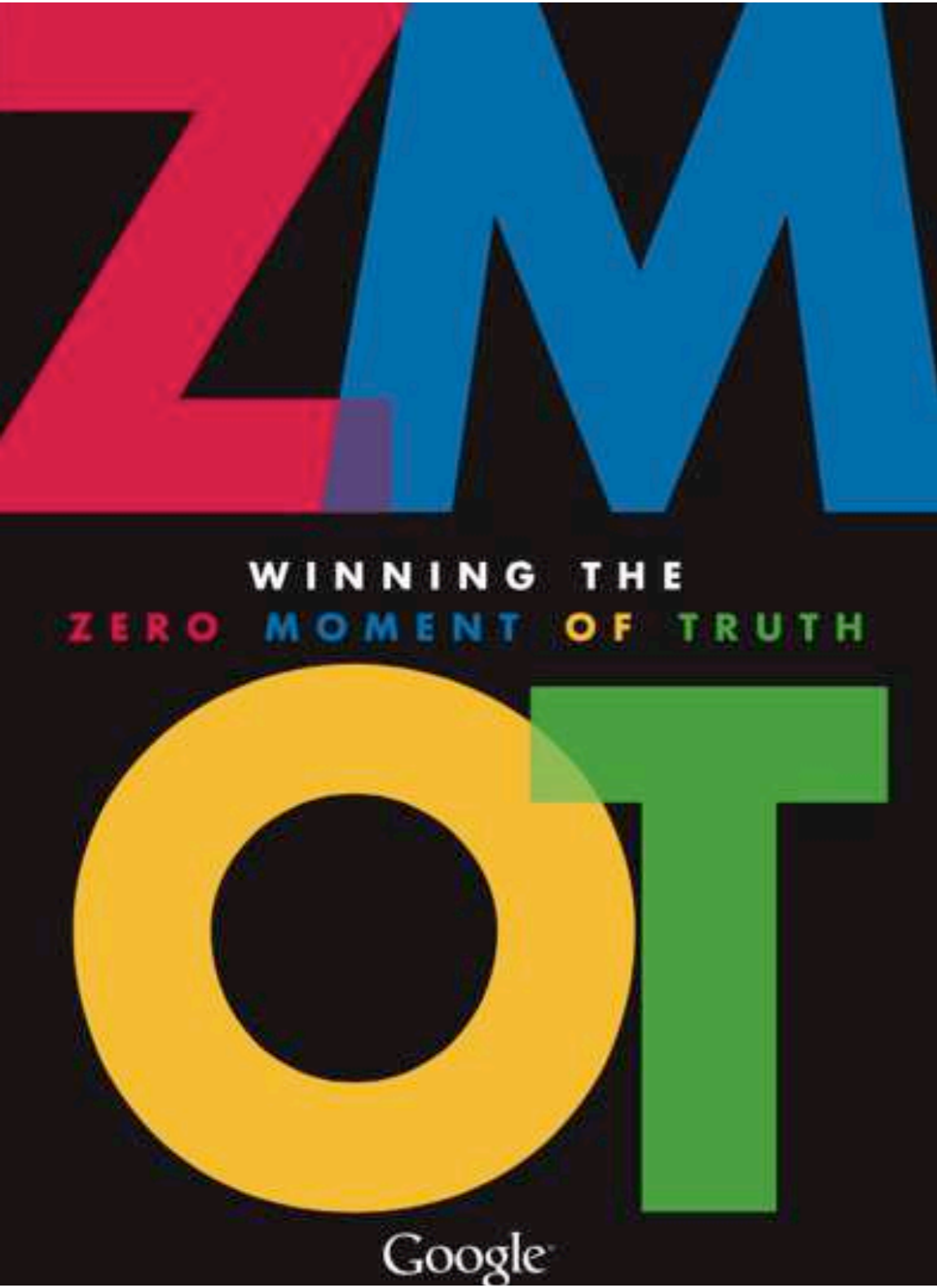
## Powering Your Business Through WhatsApp

SHORT COURSE  
5 lessons 1:08 hoursLearn how to use WhatsApp for enhanced business communication and growth in... [Read more](#)

Start course

&lt; Prev 1 2 ... 50 Next &gt;

<https://academy.hubspot.com/>



**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)

# 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>



**3 KEYS**

**MIX**

**Product**

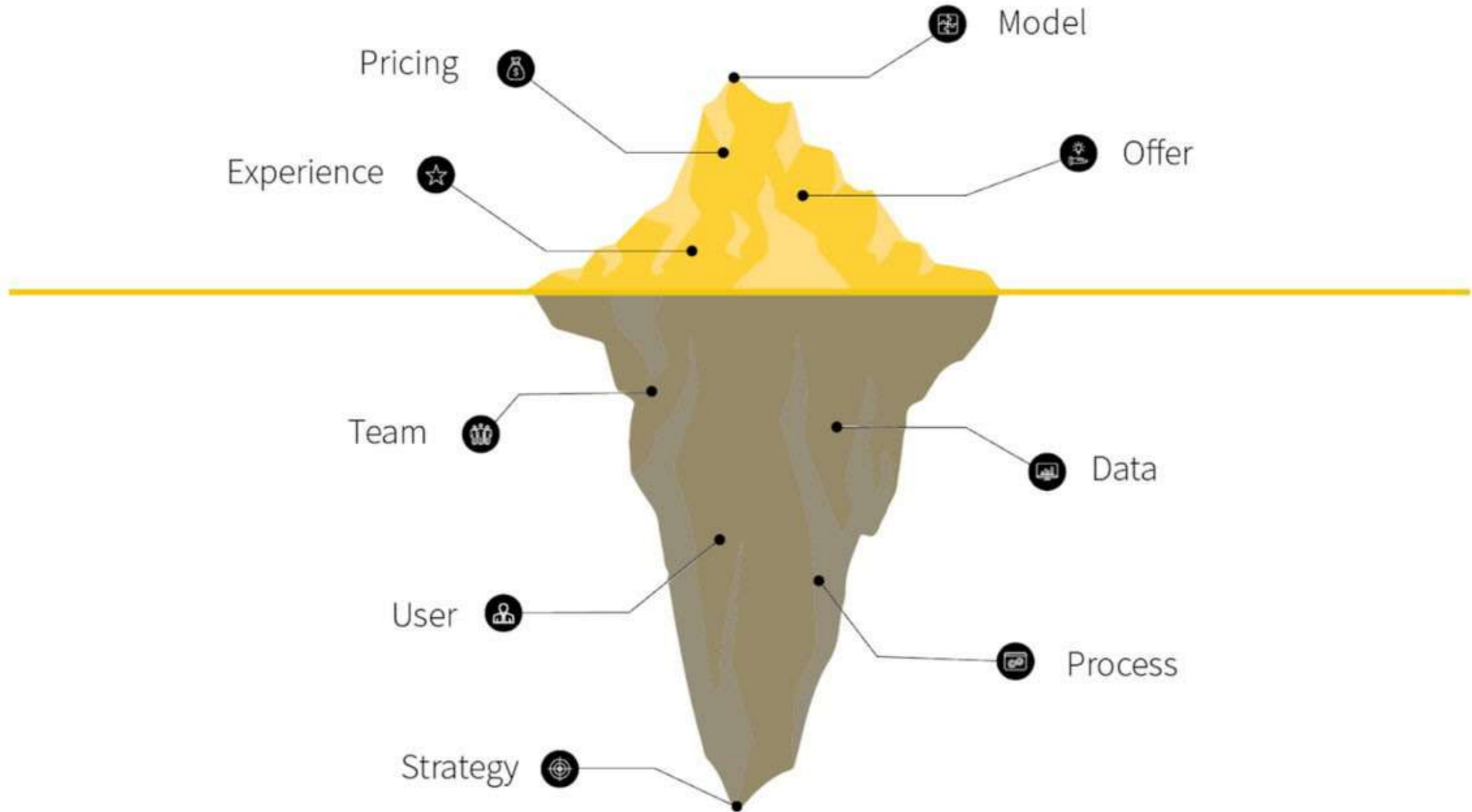
**KPI DATA**


# 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



# Product-Led Growth




$$\text{CAC} < \text{LTV}$$

Customer  
Acquisition  
Cost

Life  
Time  
Value

Équation du business développement ROMI 3:1

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

# workshop

**hubertkratioff**

06 80 43 29 05

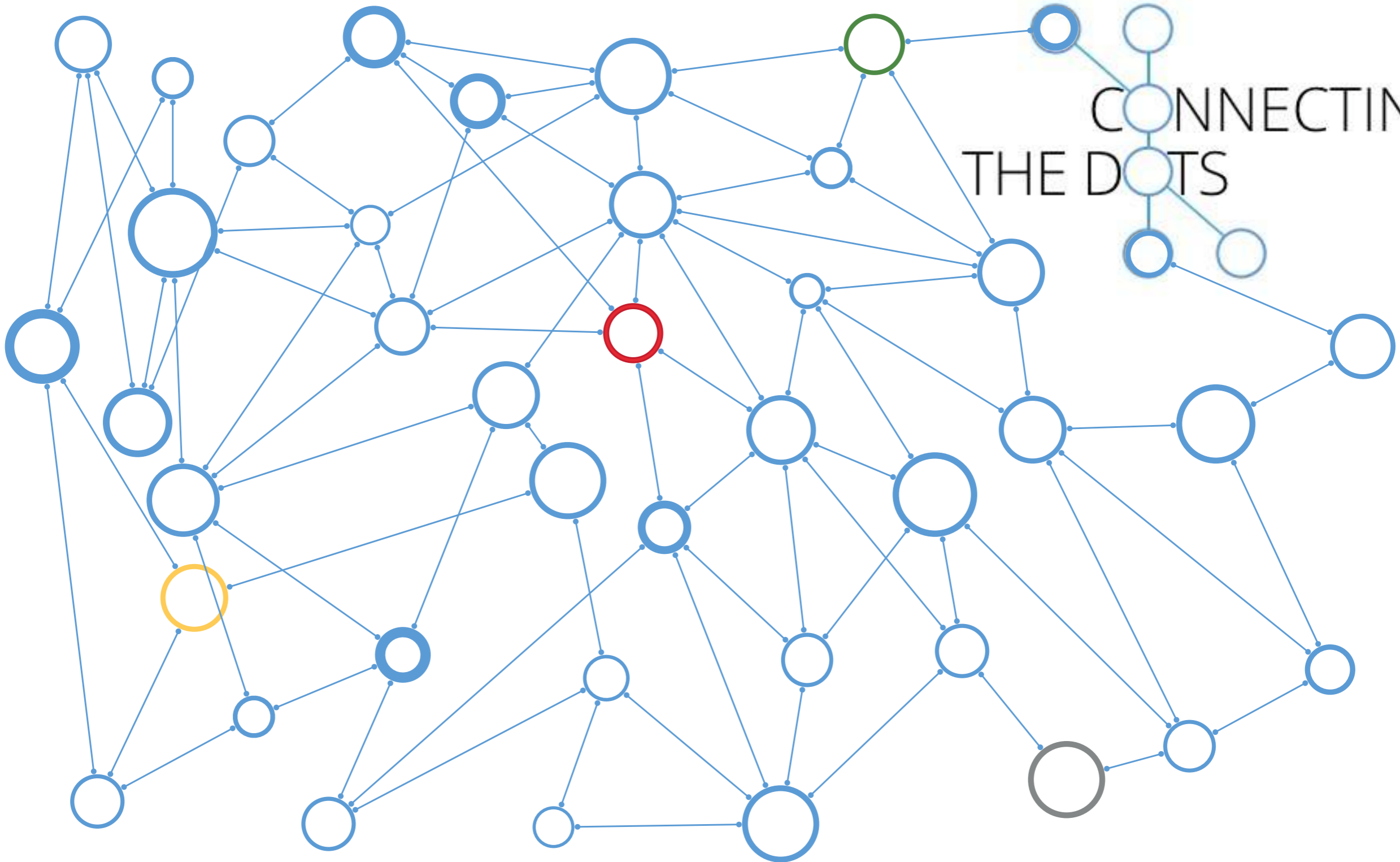
**hubert@kratioff.com**  
linkedin.com/in/kratioff  
@kratioff



# GROUP WORKSHOP

1. Qrcode
2. Slido
3. Exemple de phygital
4. MVP
5. digital=?
6. UX ≠ CX ?
7. SEO
8. NPS
9. What is WHOIS
10. VOC
11. Zero to ... ? (book)
12. Def. marketing
13. Formula for NPS
14. Full Stack
15. EX ??????????
16. TAM vs. SAM
17. Reddit
18. SAM vs SOM
19. Audience Interaction
20. 3 digital pillars
21. POC
22. Done is better than ??
23. Fail fast or slow
24. SGE
25. GTM
26. Deming Wheel in startup
27. CES ?
28. ICP
29. IOT
30. Linkedin SSI
31. MtoM
32. Moore (Gordon)
33. Rifkin
34. Touchpoint
35. WEB3
36. customer journey
37. Csat
38. YC Business Model
39. POC
40. PAIN POINT
41. SXO
42. Empathy MAP
43. SERP
44. Unicorn
45. Sales funnel
46. Contribution
47. PMF
48. Registrar

CONNECTING  
THE DOTS





Connect the dots between these 3 concepts and propose your point of view on how they interact, how they are connected, how they converge (or diverge) in two or three paragraphs (min 150 words).

It's a group work, you can use any tool, including AI, to prepare but during the exercise-test just a single sheet of paper (handwriting only) is allowed.

# GROUP WORKSHOP

1. Strategy - AAARRR - Lead
2. SAAS - Cloud - UX
3. Zero to One - Wearable - Rolex
4. Data Marketing - Survey - Bias
5. PLG - Quality - Advertising
6. Persona - Market Pull - Techno Push
7. Lead Nurturing - Sales - Email
8. Gafam - Batx - Next
9. Ecosystem - Platform - Coopetition
10. AAARRR - UV - Cookieless
11. SQL - CRO - MQL
12. VUCA - BI - SWOT
13. Positioning - Difficult - Target
14. Analysis - Goal - Strategy
15. Data - MMM - Pricing
16. LTV - Rule - CAC
17. Taxonomy - Retail Media - Search
18. SEO - SEA - KPI
19. Reach - SMO - Time Line
20. SGE - SERP - Answer

# Working Backwards

By Amazon



[Quora.com](#)


Amazon's approach to new product development is about working backwards from the customer. The product manager starts by writing a press release announcing the finished product. The press release is targeted at the end customer and contains information about the customer's problem, how current solutions are failing, and why the new product will address this problem.

The press release itself is a gut-check for whether or not the product is worth building. If the team is not excited about reading it then document needs to be revised or perhaps the idea should be revisited altogether. As the team begins development the press release serves as a guide for the team to reflect on and compare with what is being built.

The New York Times

## *What's Amazon's Secret?*

Former executives at the tech giant give an inside account of its management culture in a new book.

 Give this article



Amazon «WORKING BACKWARDS from customer» : communiqué de presse fictif / infographie finale / pitch / vidéo / website

Customer delight is our ultimate goal



Working  
Backwards



Insights, Stories,

and Secrets from

Inside Amazon

Colin Bryar

and Bill Carr

# Press Release



- Focus on the customer need
- The customer quote is key
- Leap into the future: Think BIG
- Avoid jargon
- Say it simply and clearly

Amazon Campus Launches First Multi-Channel Student Store at the University of California Berkeley  
[www.amazon.com/Campus](http://www.amazon.com/Campus) & [berkeley.amazon.com](http://berkeley.amazon.com)

**BEATY'S BUSINESS WIRE** - August 23rd, 2014 - Since returning to school for the fall semester, Berkeley students have experienced a fresh take on the college bookstore as the new Berkeley Student Store opened at an online address: [berkeley.amazon.com](http://berkeley.amazon.com).

The Amazon-curated Student Store brings Amazon's broad selection, low prices, and convenient shipping experience to the heart of Berkeley's campus and offers a number of additional student-focused features. With the launch of the Student Store, Berkeley students can now pay for any purchase on Amazon with their CalCard, buy course materials in any format via links in Berkeley's Learning Management System or directly on Amazon.com, pick up orders at convenient locations across campus, and receive FREE One-Day Shipping on textbooks sent to the campus area. Amazon Student members at Berkeley are eligible for FREE One-Day Shipping to campus on millions of additional products plus FREE Two-Day shipping on millions more.

"I've been an Amazon Student member for two years," explained senior Aubrey Simmons, "Setting the extra free one day shipping was huge. I've been ordering everything from Amazon since I got back to school. I may never have to leave campus again."

Students can access these campus-specific payment methods and shipping benefits, along with the full selection of custom textbooks - typically available only through the university's licensed bookstore - by selecting the Berkeley co-branded Amazon experience when they visit [berkeley.amazon.com](http://berkeley.amazon.com), sign up for Amazon Student and select "Berkeley" as their school, or click on links to Amazon within the Berkeley Learning Management System.

In place of a traditional campus bookstore, Amazon has deployed Lockers across campus and built the first Amazon Student Lounge, a space that features a package pick up desk, technology showroom, and lounge area for students to study, meet, read or just relax in between classes. "Getting my textbooks was way easier this year. Instead of heading the 15 to the store to pick out my books and wait in line, I simply went to [berkeley.amazon.com](http://berkeley.amazon.com), paid for my books with my Cal Card, and came down to the Student Lounge to pick them up the next day," said senior Matt Simmons. "I spent less than 10 minutes on the entire process." Inside the Student Lounge, Amazon offers students free access to Prime Instant Video and Prime Music streaming. "It's my new favorite spot to chill in between classes," said John White, junior. "I didn't even know Amazon had so much streaming video until I logged on to the Wi-Fi network in the lounge, and I definitely didn't know you got it for free with Amazon Student. I just cancelled my Netflix subscription."

AWS financial

## The FAQ



- Include both customer FAQs and stakeholder FAQs
- Include the hard questions
- Share your Press Release early to gather questions

**Student Customer FAQs**

**Q1: What do I get when Amazon is on my campus?** Students get a number of benefits when Amazon is on campus. By enjoying the co-branded experience on Amazon, students receive Free One Day shipping on textbooks to campus addresses, access to custom textbook selection, the ability to pay with their university ID card, and the ability to pick up Amazon.com orders at pick up points on campus. On campus, all students will have access to an Amazon Student Lounge.

**Q2: How do I activate the co-branded experience?** Students at each university will have four methods for getting into the co-branded experience: 1) visiting the co-branded subdomain directly by typing the URL [berkeley.amazon.com](http://berkeley.amazon.com) in their browser, or clicking an external link, 2) joining the Amazon Student program and selecting their school, 3) shopping for textbooks via links in their school's Learning Management System, 4) clicking on a Student Store merchandising placement on Amazon.com. Once customers have signed in, they will see a personalized branded toolbar on the top of the page whenever they return to Amazon.com. Customers can turn the experience off at any time by navigating to the "Account Settings" menu in "Your Account".

**Q3: What do I get if I sign up for Amazon Student when Amazon is on my campus?** Amazon Student members at your school get all the standard benefits of the program (e.g. Free One Day shipping to the campus area on millions of low selling products. Standard benefits include free Two-Day shipping on Prime eligible items, unlimited instant streaming of Prime instant video content and access to the Kindle Owners' Lending Library. The cost of a Student membership will remain \$3.99/year).

**Q4: Why aren't there any "grab and go" items available for purchase at the Student Lounge?** At launch, we will not be able to sell products to customers "on demand" at the Student Lounge because we do not have a Point of Sale system or the ability to stock inventory for sale on site. However, we intend to offer this in the future for a small selection of top-selling products. In the meantime, customers may order items displayed in the Lounge by using the bar code scan feature in the Amazon Mobile App.

**Q5: Why is Free One Day shipping limited to campus addresses? Why don't I get Free One Day shipping to my parent's house?** By working directly with a university, Amazon is able to reduce costs associated with shipping orders to campus, a benefit we want to pass on to all students at the school via Free One Day Shipping for textbooks, and to our Amazon Student members via Free One Day Shipping on millions of other eligible products. However, in order to provide these benefits at no additional cost, we must limit the geography in which we offer this benefit to those zip codes served from our on-campus delivery station. Amazon Student members always receive free Two-Day shipping on Prime eligible items, to campus or most other addresses in the continental US.

**Internal FAQs**

**Q1: How will on-campus delivery work?** Our on-campus delivery model will leverage a sort center (or fulfillment center) as an origin point for daily milk runs to the campus area, where palletized orders are delivered to multiple drop points/less on campus. These drop points would include 1) the Amazon Lounge (pick up desk), 2) lockers or large dorms, dorm complexes, or large multi-dwelling units, and 3) the campus delivery station, where full-campus residential deliveries will be served for local delivery by

aws SUMMIT

## The Visuals



- Rough idea – rough drawing
- Match fidelity to maturity of your idea
- Don't be afraid to be provocative
- Create discussion



aws SUMMIT

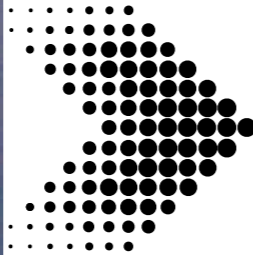
Amazon «WORKING BACKWARDS from customer»: communiqué de presse fictif / infographie finale / pitch / vidéo / website





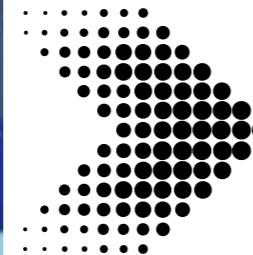
## Client Utilisateur

*prêt pour le départ  
vers un monde meilleur*



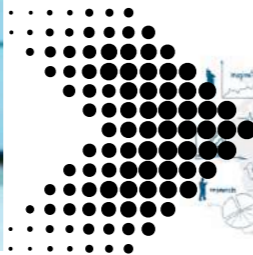
## article de presse

*pour le lancement du  
service, quel sera l'article  
de presse idéal*



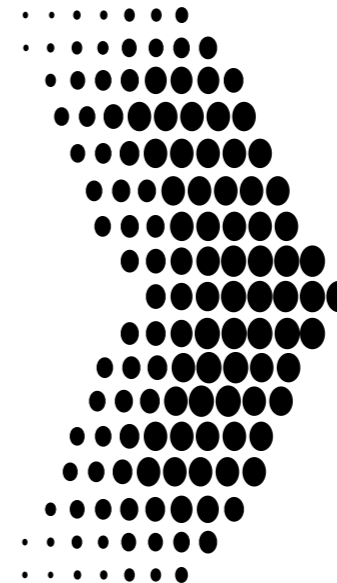
## foire aux questions

*quelles seront les questions  
des clients, utilisateurs...  
Quelles réponses ?*



## parcours client

*quand un client aura un  
problème, comment le solutionner*



## prototype

*essai de service ou produit  
pour tests et modifications*



## Working backwards is a process


Use it to get clarity, not to document what you've already decided to do



# SECRET SAUCE



1  
PROBLÈME



2  
SOLUTION



3  
DISTRIBUTION



Recette du succès des entreprises

# PROBLÈME

# 1

ANALYSE  
BI  
Marché  
Search listening  
Veille  
Persona  
Carte empathie  
Parcours  
Touchpoint  
UX  
Design Thinking  
Divergeant  
VOC  
Service client



# SOLUTION

# 2

Product-Management  
Service  
Use case  
Prototype  
MVP  
POC  
Pilot  
GTM  
PMF  
Pivot  
Scalable  
Démonstrateur  
Market-Pull  
Demand-Marketing



# DISTRIBU- TION

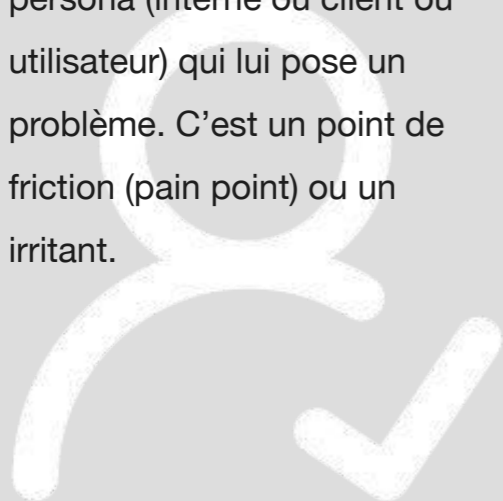
# 3

Stratégie  
Objectifs  
Communication  
Vente  
SAAS  
Service  
APP  
SuperAPP  
IOT  
Capteur  
PAAS IAAS  
Réseaux S  
Points de vente  
Agent  
Intermédiaires  
Franchises  
...



## PROBLÈME.

Il y a une situation pour un persona (interne ou client ou utilisateur) qui lui pose un problème. C'est un point de friction (pain point) ou un irritant.



## SOLUTION.

**Vous avez une solution qui résout 20% à 80% du problème pour plus de 50% de la population.**



**Le PFH ne se résout pas**  
*Hubert REEVES*



## DISTRIBUTION.

**Si vous avez la solution à un problème : vous êtes un sauveur, ... si vous le distribuez : vous êtes riches**



*hk*



# Recette du succès des scaleup

# 1 PROBLÈME

ANALYSE  
BI  
Marché  
Search listening  
Veille  
Persona  
Carte empathie  
Parcours  
Touchpoint  
UX  
Design Thinking  
Divergeant  
VOC  
Service client



# 2 SOLUTION

Product-Management  
Service  
Use case  
Prototype  
MVP  
POC  
Pilot  
GTM  
PMF  
Pivot  
Scalable  
Démonstrateur  
Market-Pull  
Demand-Marketing



# 3 DISTRIBUTION

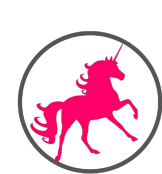
Stratégie  
Objectifs  
Communication  
Vente  
SAAS  
Service  
APP  
SuperAPP  
IOT  
Capteur  
PAAS IAAS  
Réseaux S  
Points de vente  
Agent  
Intermédiaires  
Franchises



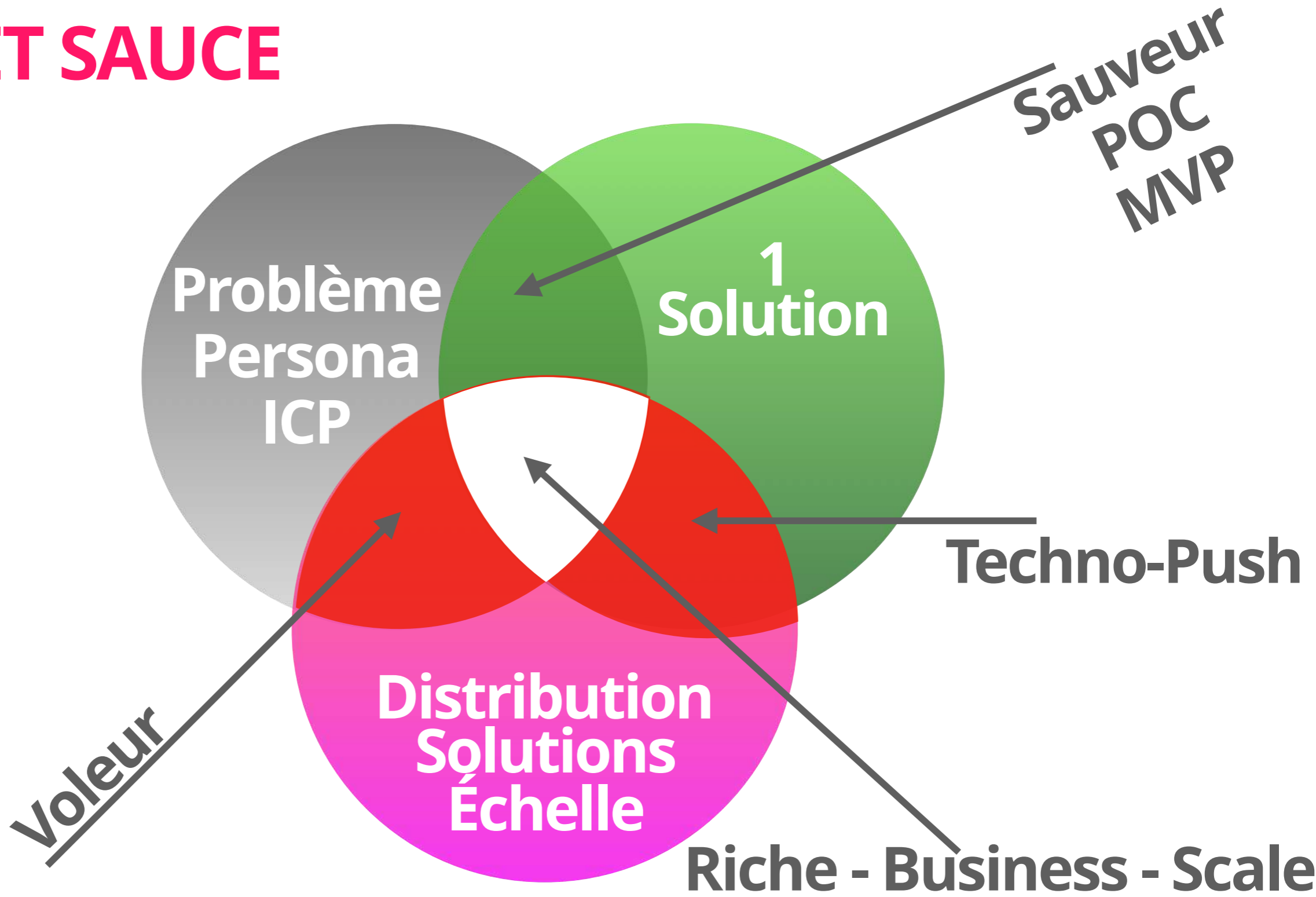
# 4 GROWTH

Growth  
hacking  
Scale  
Scale up  
Échelle  
0 marginal cost





# SECRET SAUCE





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

**techno**

**push**

**putsch**

1/  
*marketing de  
l'offre*

**techno  
push  
putsch**

**CATALOGUE PRODUIT**  
**Offre initiale (solution)**  
**Problème résolu**  
**Persona**  
**Carte empathie**  
**Value proposition**  
**Offre finale**  
**Distribution**

**Portefeuille de clients**

**Persona**

**Carte empathie**

**Problèmes réels**

**Value proposition**

**Offre**

**(solution qui résout le problème)**

**Distribution**

*2/*

*marketing de la  
demande*



# RASOIR OKAM\*



**“All things being equal, the simplest solution tends to be the best one.”**

**William of Ockham**

Solutions complexes  
complètes  
multi-factorielles

**simple  
solution**

**BEST  
CHOICE**

MMS

minimum viable strategy

MVP

minimum viable product



# MILP

minimum lovable product

M♥P



***P*** ***M*** ***M*** ***F***

***PMMF*** (*infini ∞*)

**≠**

***PF*** (*product fit 1+ user*)

# Ordre / Définition / Schéma :

- 1 Prototype (wireframing)
- 2 MVP (mini viable product)
- 3 PMF (product market fit)
- 4 Pivot (changement de stratégie)
- 5 Scale (passage à l'échelle)
- 6 POC (proof of concept)
- 7 GTM (Go to Market)
- 8 Démonstrateur, Pilot
- 9 Use case (Business case, cas d'usage)



AdTech

MarTech



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



<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





# French Programmatic Trend

April 2024

## Monthly Overview ▾

Month on Month:

Advertiser spendings

-5%

Impressions

-2%

CPM

-3%

Year on Year:

Advertiser spendings

+9%

Impressions

+5%

CPM

+3%

## Top Programmatic Demand - Deal market ▾

Top Programmatic Advertisers:

▾ Only filtered on deals

Advertiser	Share of Voice	CPM	MoM Spending trend
1. TotalEnergies - Total Direct Energie	2.5%	€8.06	+ 173%
2. Action.com	2.5%	€11.43	+ 256%
3. Carrefour	2.4%	€4.07	+ 8%
4. E Leclerc	2.2%	€3.90	+ 9%
5. EDF	2.2%	€9.60	+ 176%
6. Carnival Corporation & plc - Princess Cruises	2.0%	€3.35	+ 119%
7. Ferrero - Nutella	1.7%	€7.48	+ 4%
8. Amazon	1.7%	€5.49	+ 186%
9. Renault	1.5%	€7.53	- 57%
10. Alphabet - Google	1.5%	€8.00	+ 363%

Top Advertisers Verticals:

▾ Only filtered on deals

Business Segment	Share of Voice	CPM	MoM Spending trend
1. Retail and E-commerce	18.1%	€4.80	+ 19%
2. Automotive & Vehicles	10.7%	€6.62	- 25%
3. Consumer Packaged Goods (CPG)	8.8%	€6.27	+ 11%

# 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

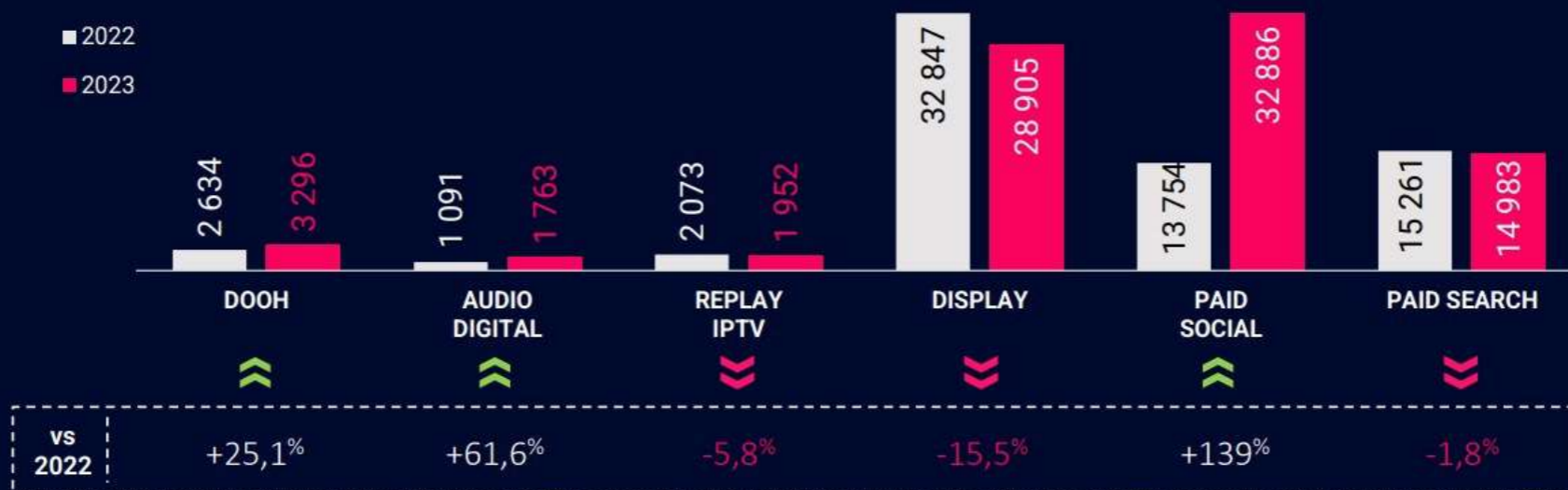
**7%**

# 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



# 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 & Programmatic »

RTB

AdExchange



# 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

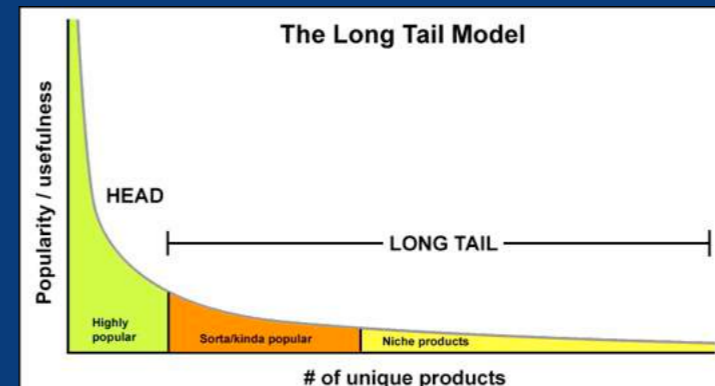
## Long Tail

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



**RTB**

# Ciblage + Enchère

Programmatic advertising

ADTECH (MARTECH)

Achat d'espace programmatique

Automation

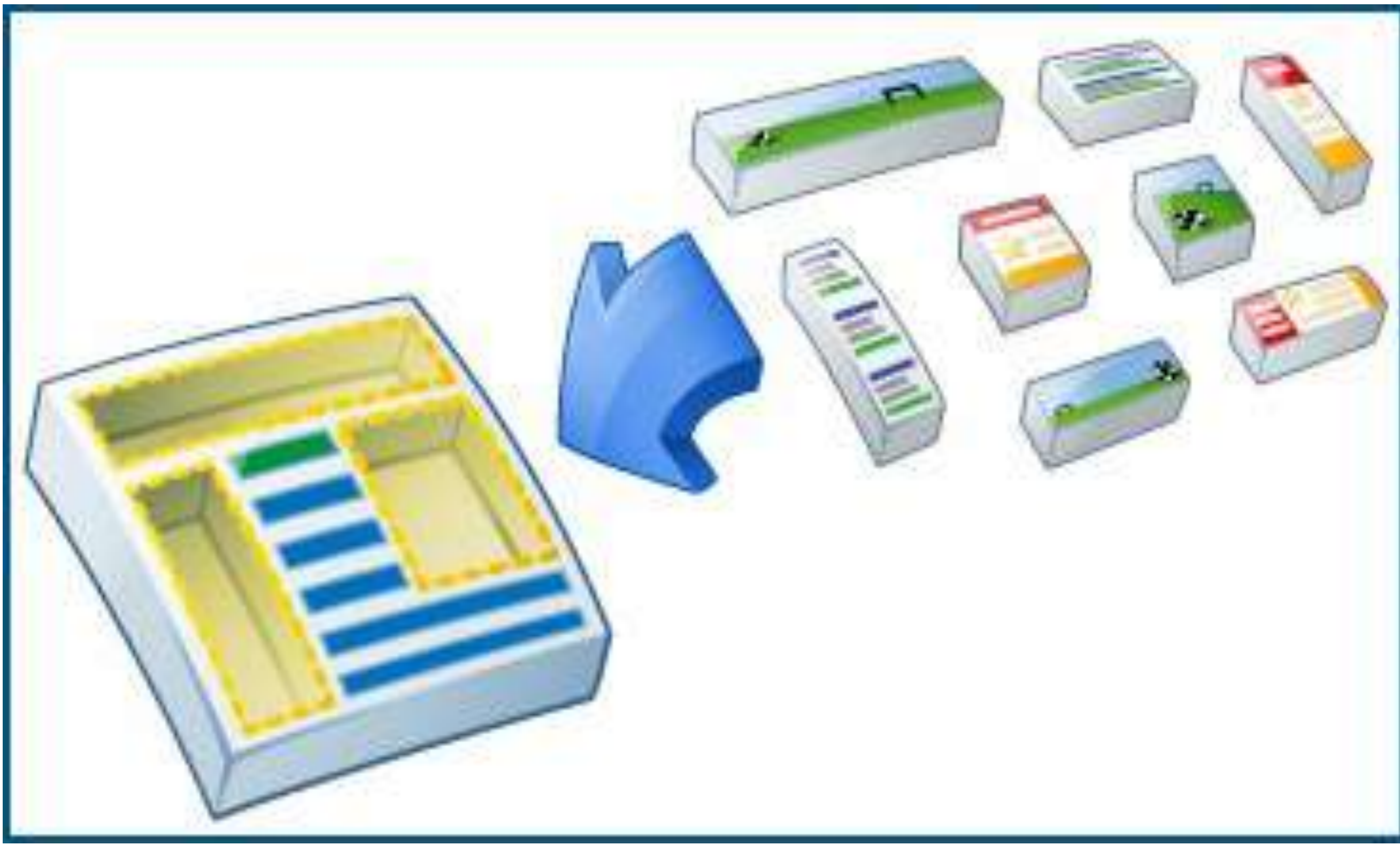
Transaction auto

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

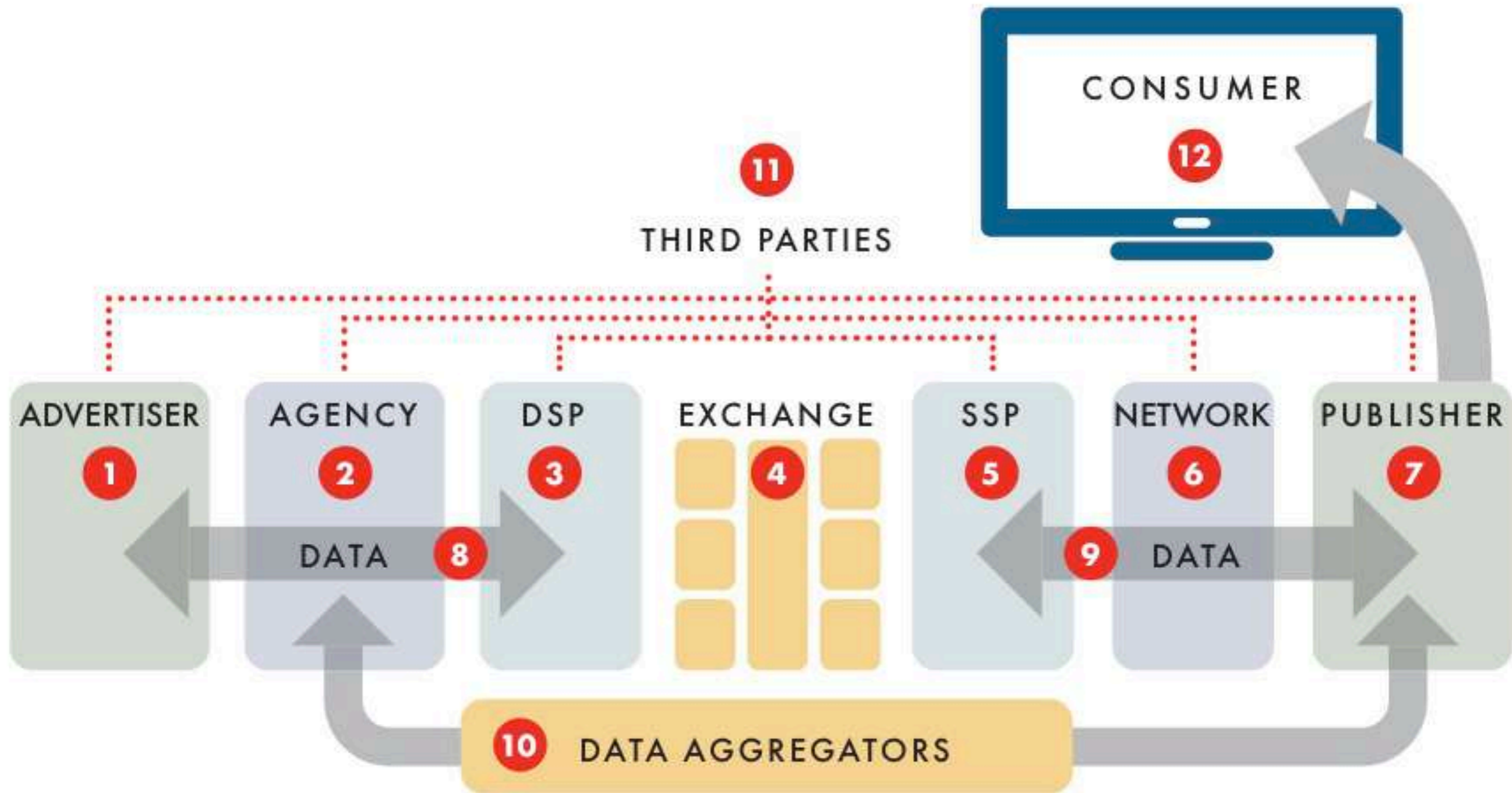
Règles

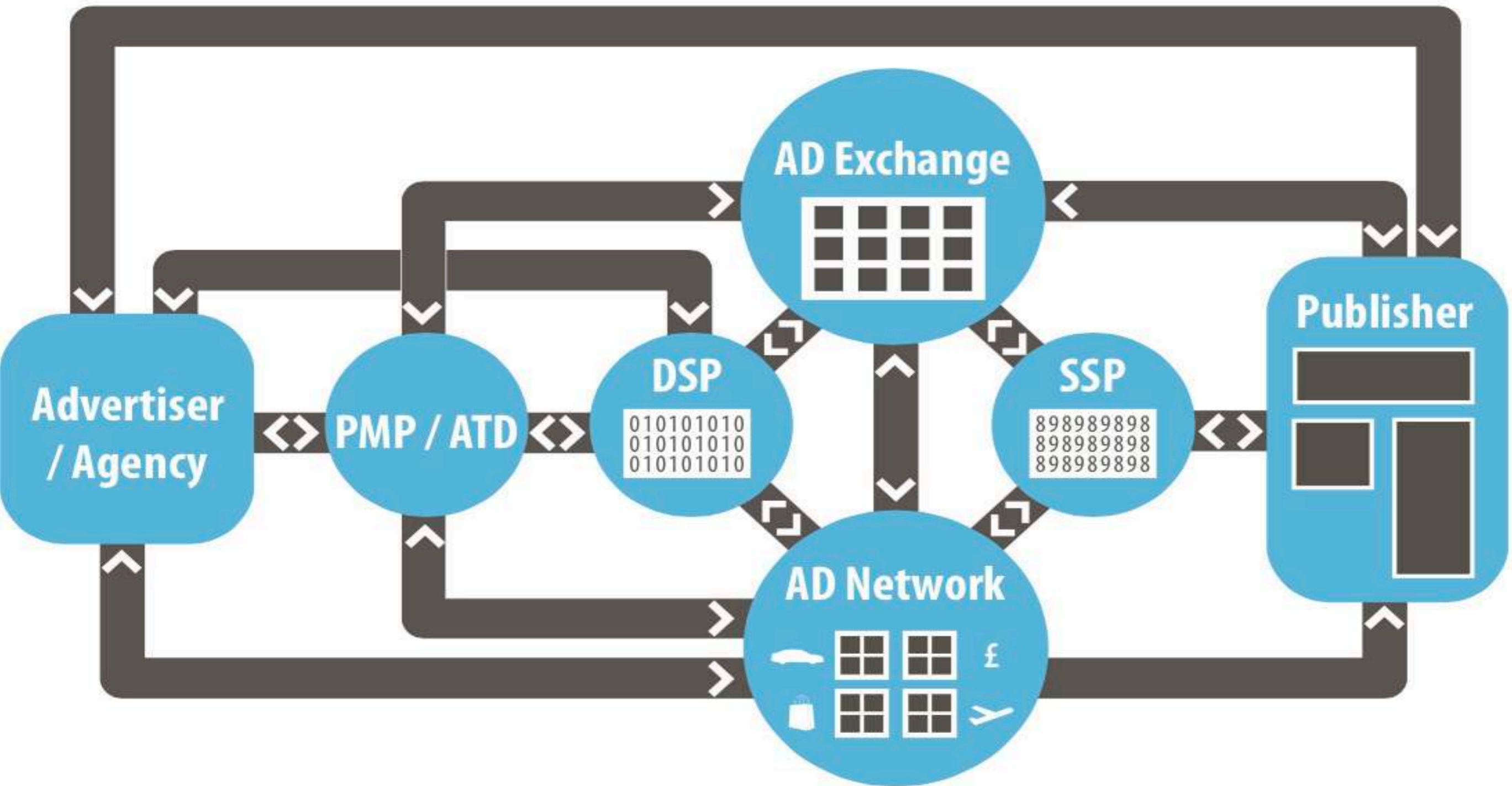
BRAIN

DemandSidePlatform

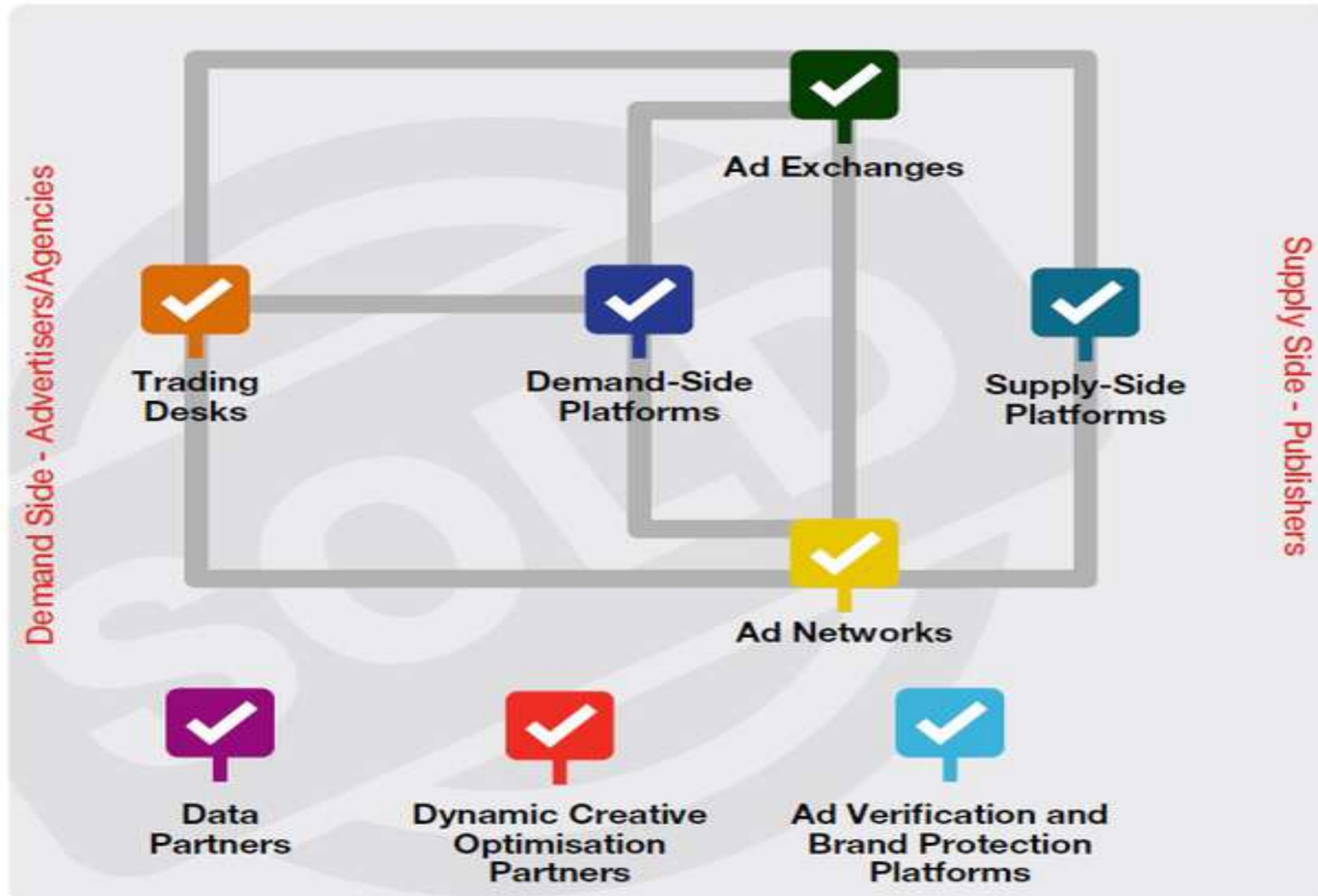
AGENCES

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

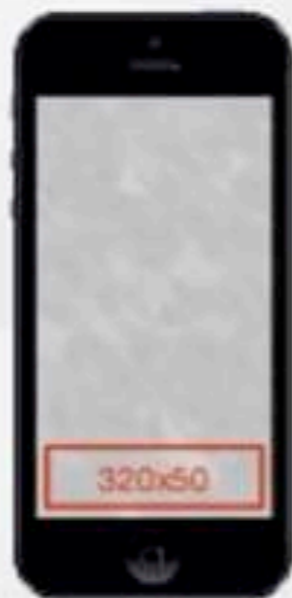


tous les standards mobiles sont accessibles en programmation

*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.



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**Retail**



**Media**





## 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) ■

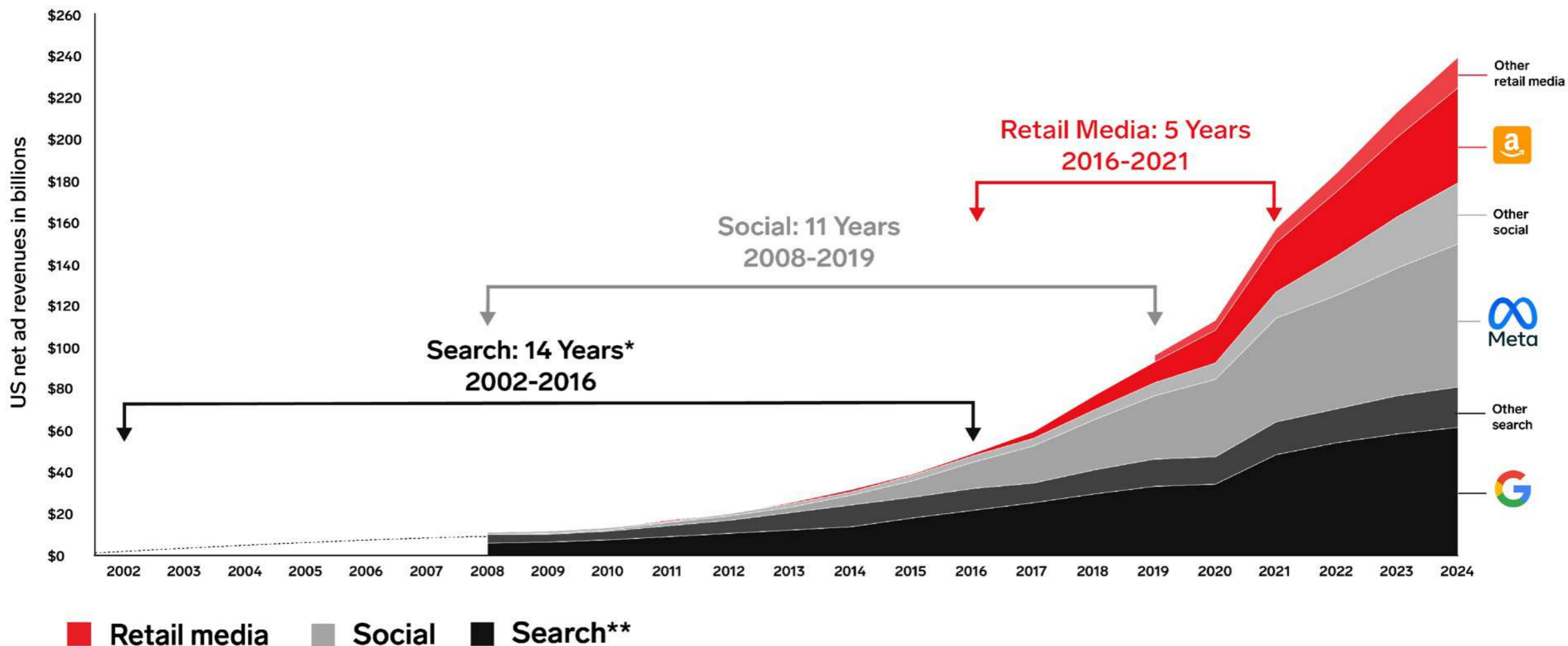


# Retail Media

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

Au milieu de plusieurs catégories

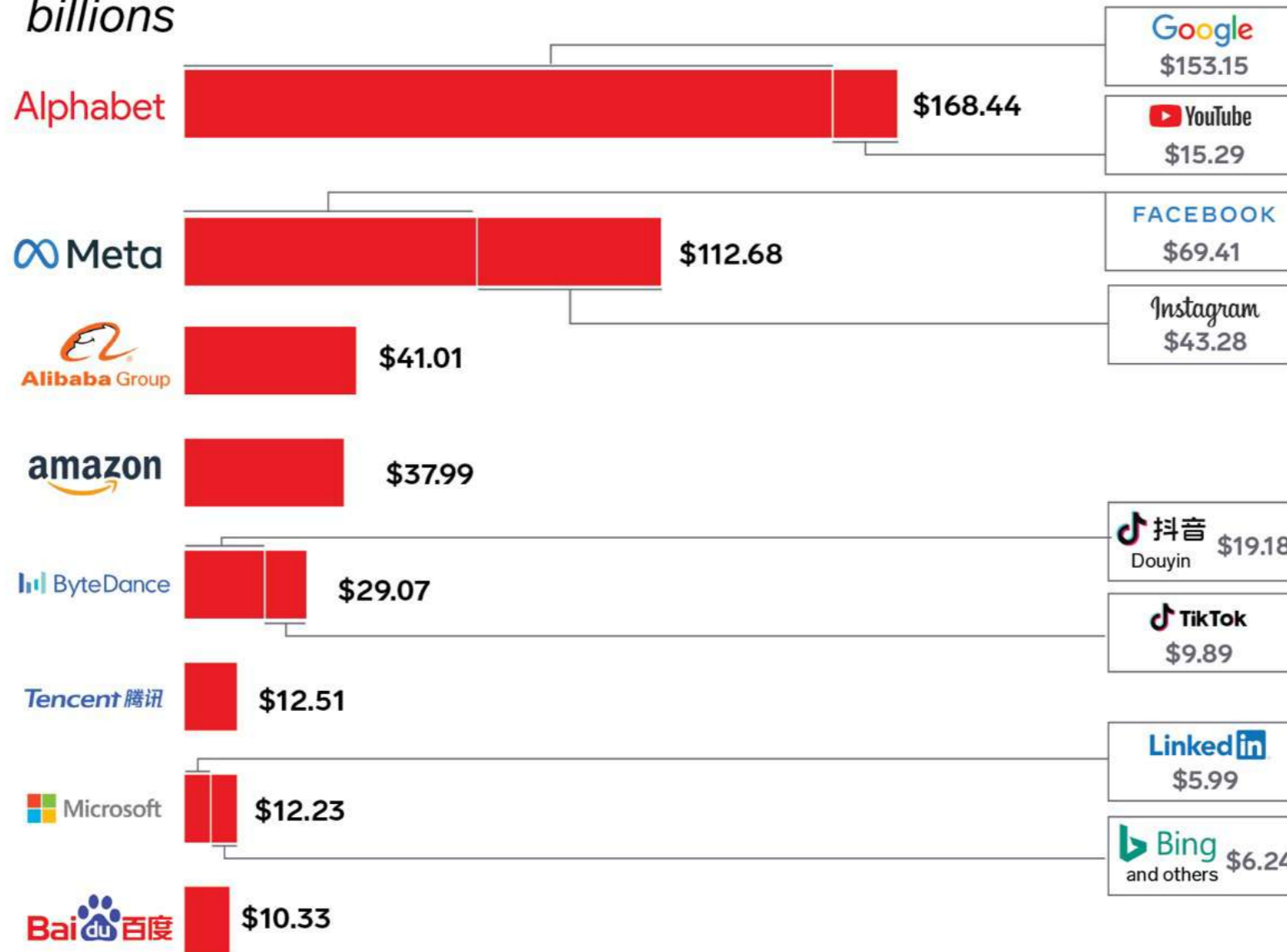
# Years For Search, Social, and Retail Media Advertising Markets to Grow From \$1 Billion to Over \$30 Billion



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

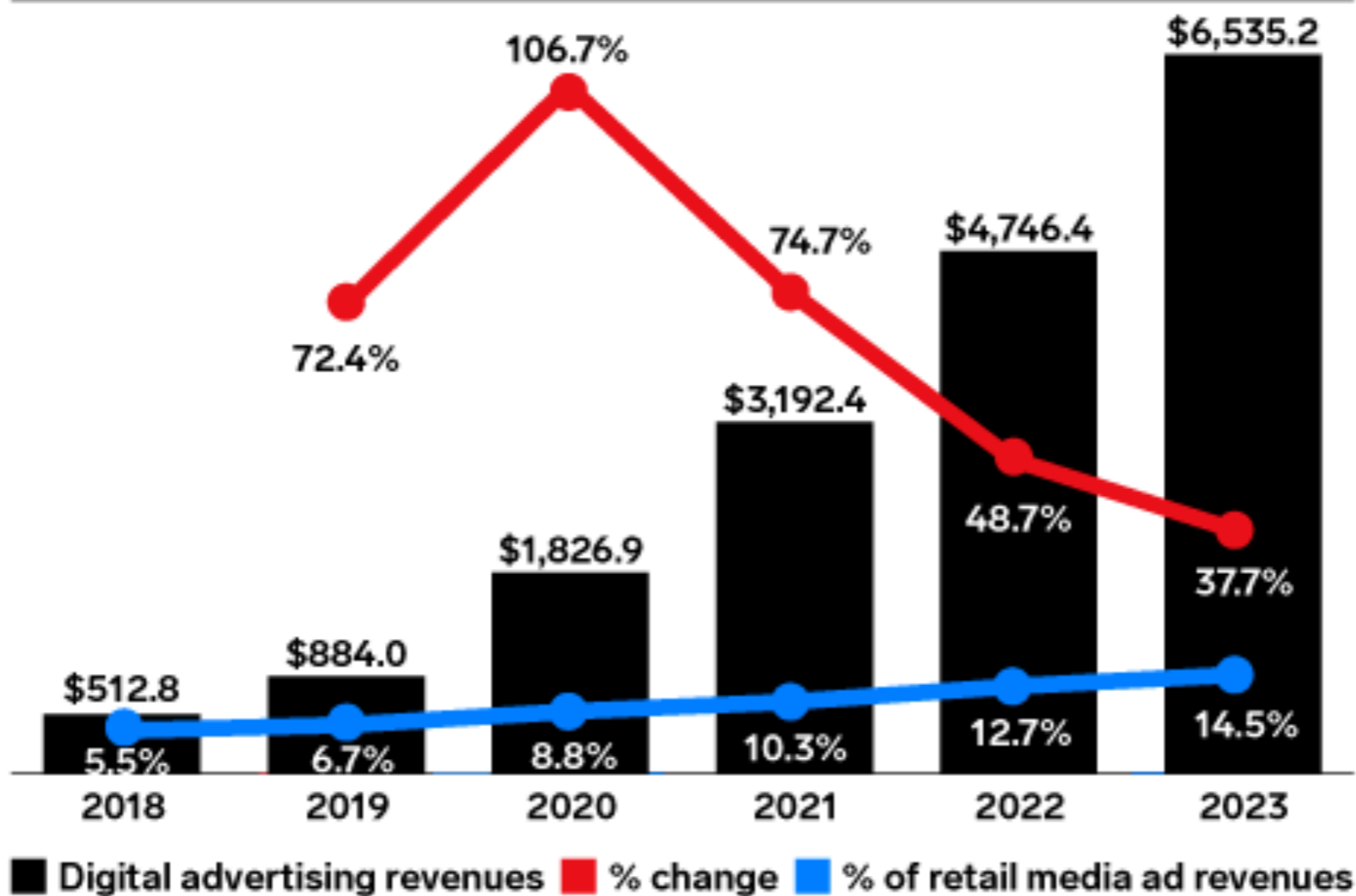


Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites;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

Source: eMarketer, Oct 2022

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

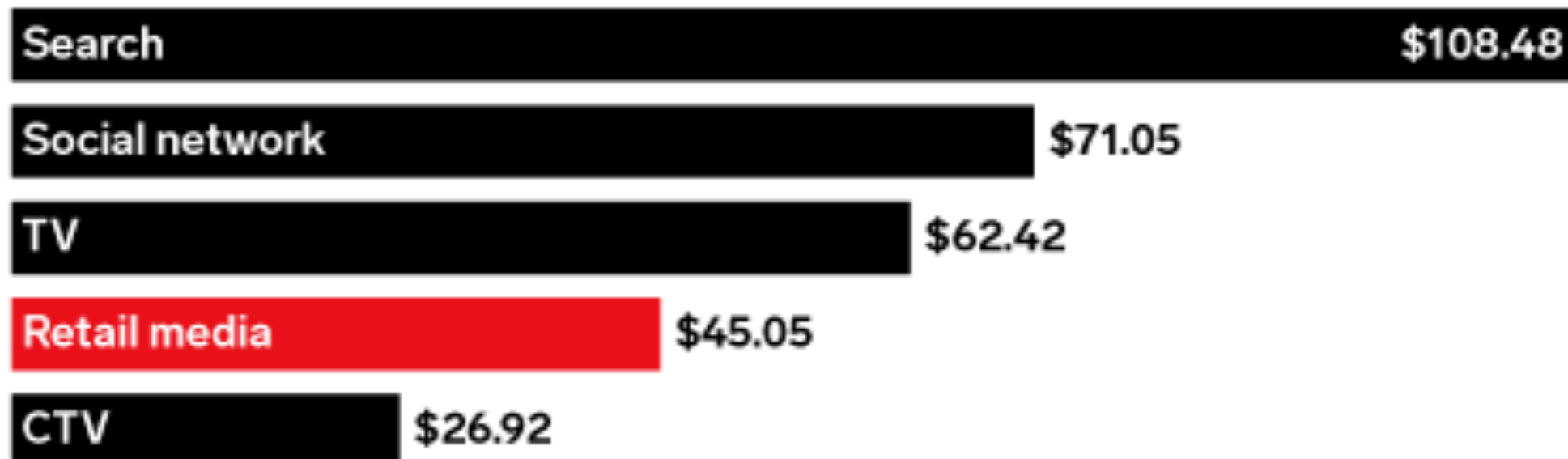
millions, % change, and % of retail media ad revenues



Source: eMarketer, Oct 2022

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

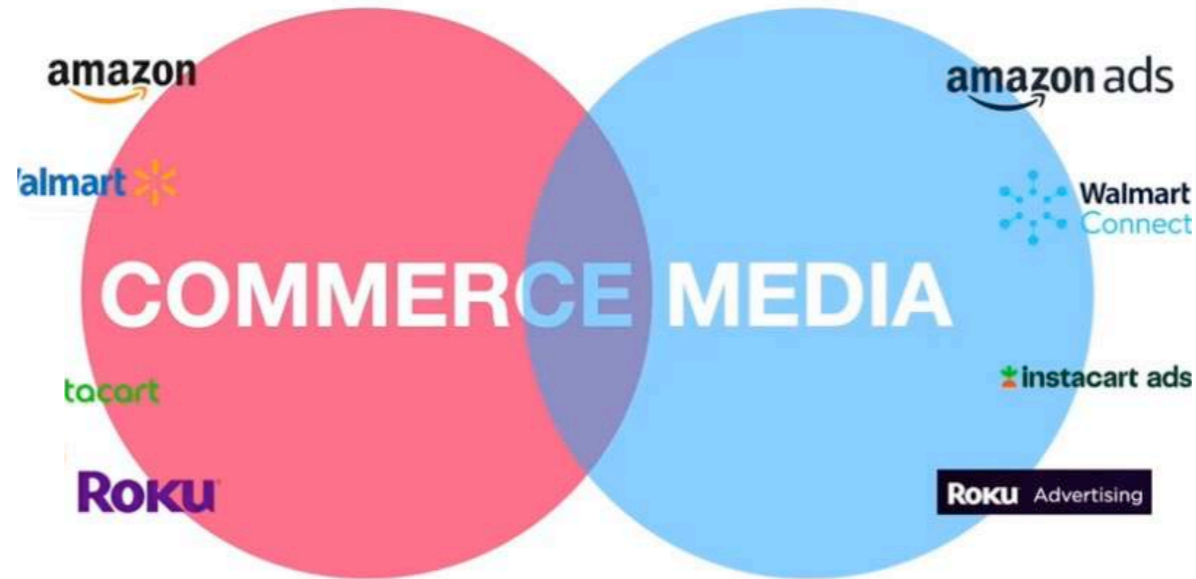
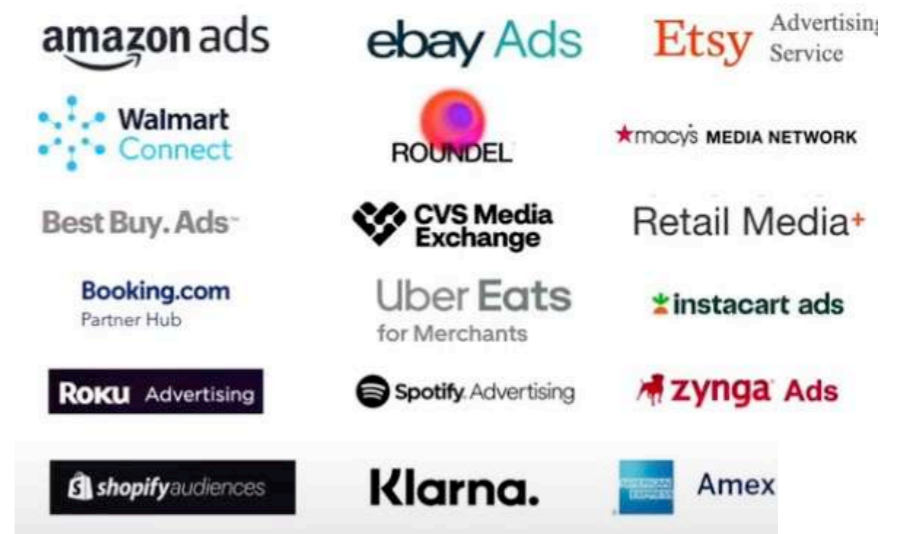
billions



*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*

# 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

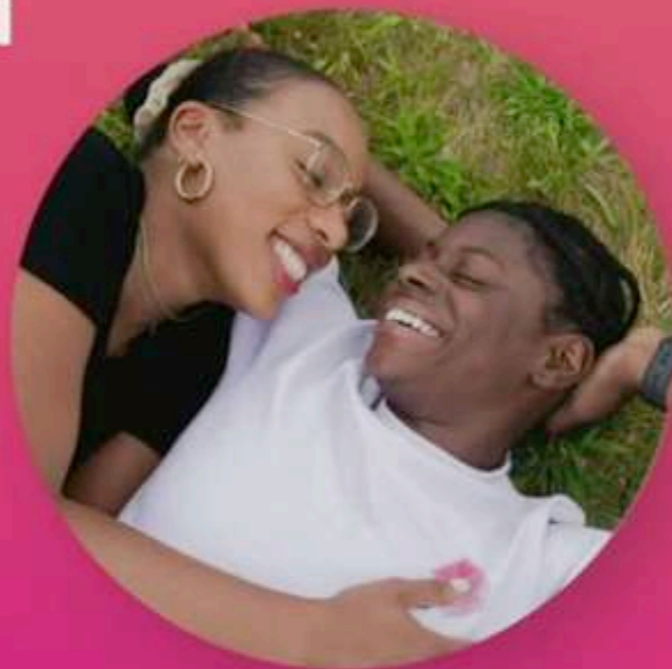
Mesure  
avancée

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

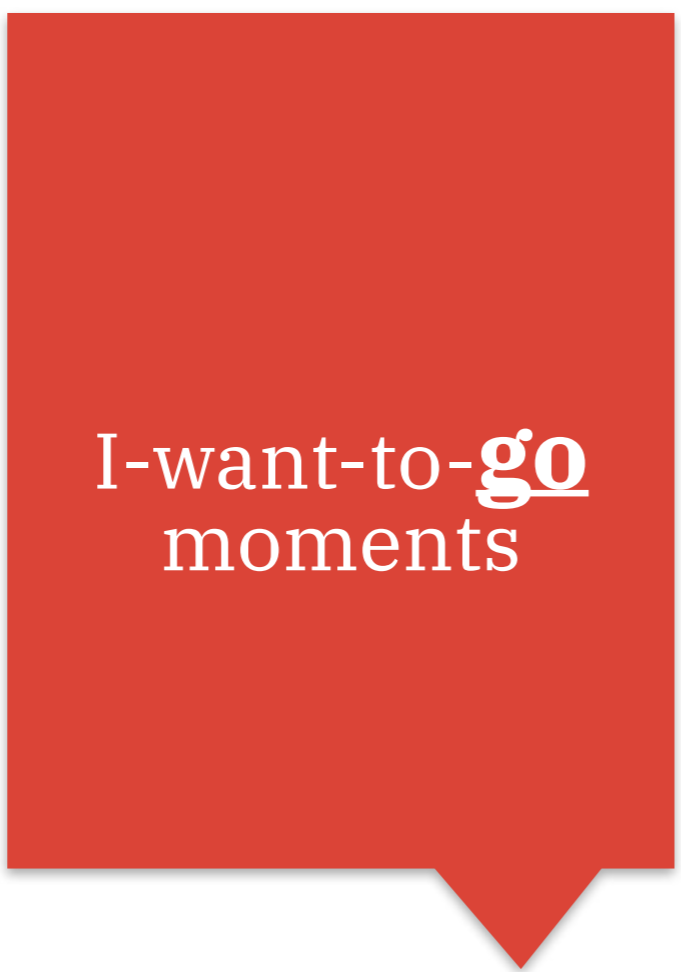
**+41%**  
Taux  
d'engagement

**+10%**  
Taux de  
conversion

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Information



Direction  
Hours



Action  
Decision



Purchase  
Promotion  
Sales-Saving

I-want-to-**know**  
moments:

- A1:
- A2:
- A3:
- A4:
- A5:

Information

I-want-to-**go**  
moments:

- B1:
- B2:
- B3:
- B4:
- B5:

Direction  
Hours

I-want-to-**do**  
moments:

- C1:
- C2:
- C3:
- C4:
- C5:

Action  
Decision

I-want-to-**buy**  
moments:

- D1:
- D2:
- D3:
- D4:
- D5:

Purchase  
Promotion  
Sales-Saving

I-want-to-**know**  
moments:

A1:  
A2:  
A3:  
A4:  
A5:

Information

I-want-to-**go**  
moments:

B1:  
B2:  
B3:  
B4:  
B5:

Direction  
Hours

I-want-to-**do**  
moments:

C1:  
C2:  
C3:  
C4:  
C5:

Action  
Decision

I-want-to-**buy**  
moments:

D1:  
D2:  
D3:  
D4:  
D5:

Purchase  
Promotion  
Sales-Saving

I-want-  
to-**???**  
moments:

E1:  
E2:  
E3:  
E4:  
E5:

???





### I-want-to-know moments:

When someone is exploring or researching, but is not necessarily in purchase mode.



### I-want-to-go moments:

When someone is looking for a local business or is considering buying a product at a nearby store.



### I-want-to-do moments:

When someone wants help completing a task or trying something new.



### I-want-to-buy moments:

When someone is ready to make a purchase and may need help deciding what to buy or how to buy it.



## 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

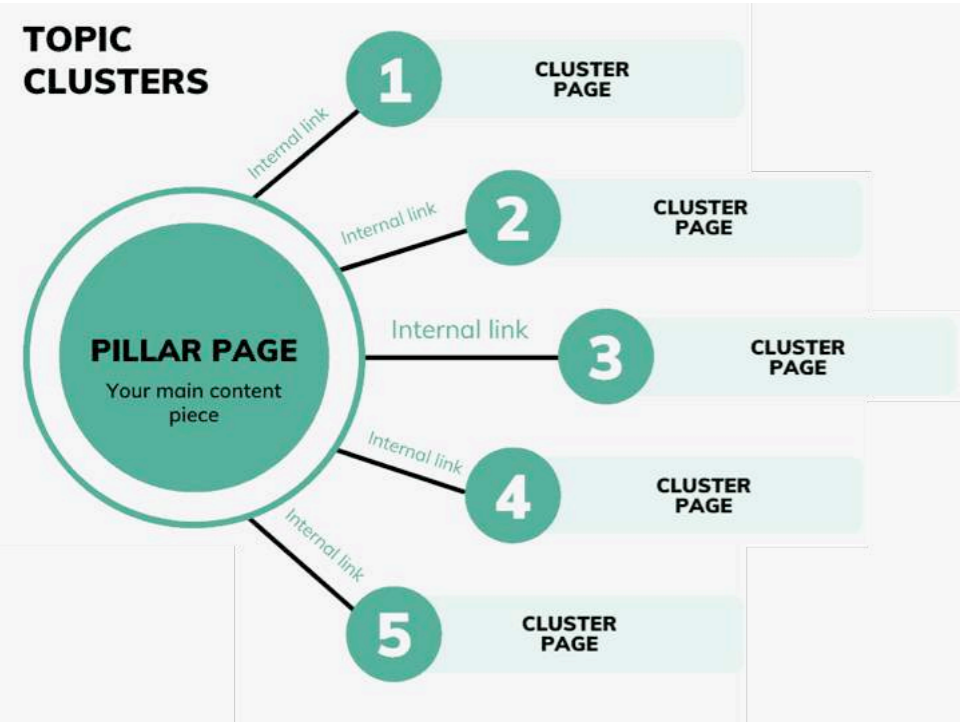
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82%

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>

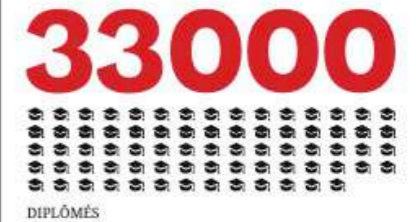
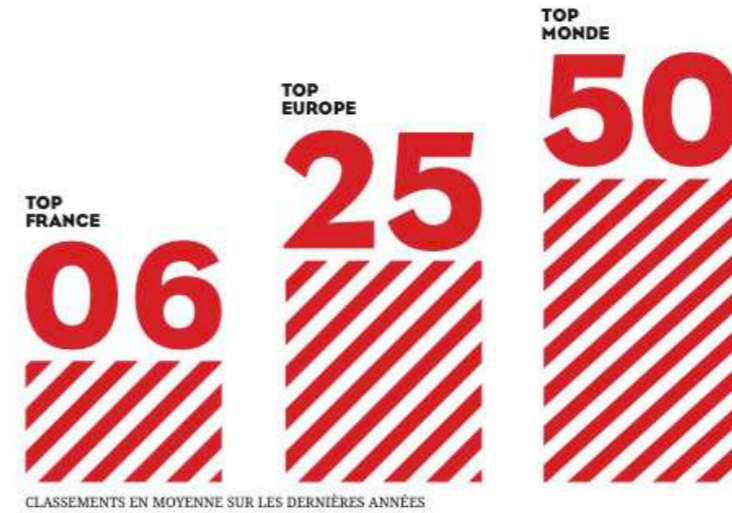


# What are Topic Clusters?

**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
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6 CHAIRES





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En rejoignant Grenoble Ecole de Management, vous faites le choix d'une école réellement engagée. Notre mission et notre raison d'être : apporter des réponses, par la formation et la recherche, aux grands défis de la transition écologique, sociétale et économique, et contribuer à un monde plus résilient, plus juste, plus pacifique, plus responsable.

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# SUBTLE

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