WORLD BEHIND THE BUBBLE

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

GROUPM
NOVEMBER 2023

CONTENT

MEDIA BUBBLES PROJECT 2023

online questionnaire
15. 9. – 7. 10. 2023

Media & Ad Agencies– WPP agencies' employees; **N = 314**
Clients – our clients, advertisers; **N = 198**
Czech Online Population – Czech National Panel; **N = 1 015**
+ young 15-25 y.o. boost; N = 455

PROJECT BACKGROUND

Why did we start this project

Although we have every sophisticated program that process not only media data about consumers, let's face it, quite often we slip into doing something or making a decision based on our "experience, feelings, intuition". After all, we live in the same world, we consume the same media, and we are consumers too. But it would certainly not be wise to rely on our experience for media planning and marketing, because the media (and certainly consumer) habits of the media and advertising people, our clients and marketers in general, are often fundamentally different from the general population.

We state it as a fact. Because we already found out that this is the case in the past 2 waves of the project. Therefore, in the 3rd wave (2023), we used the same procedure for evaluating the media habits of media people, advertisers, their clients and the general online population. This year, however, we also looked at a few current topics that people live by, and how they perceive it when brands address societal issues.

Definition of group descriptions used in the charts

General population = a representative sample according to gender, age, education, region and size of the place of residence of the online population of the Czech Republic, i.e. those with access to the Internet and at the same time older than 15 years. That's more than 92% of people over the age of 15. Data collection took place at the Czech National Panel.

Young people under 25 years of age = in order to be able to reliably evaluate this part of the population, we boosted this age group this year (it has therefore a larger sample than would correspond to the natural share in the population).

Media people = employees of media agencies Wavemaker, EssenceMediacom, Mindshare, GroupM and H1.

Ad people = employees of Ogilvy and VMLY&R ad agencies.

Clients, advertisers = representatives among the clients of the above agencies.

Data sources

Unless otherwise stated, the data comes from the 3rd wave of Media Bubbles project done by the GroupM agency.

SUMMARY

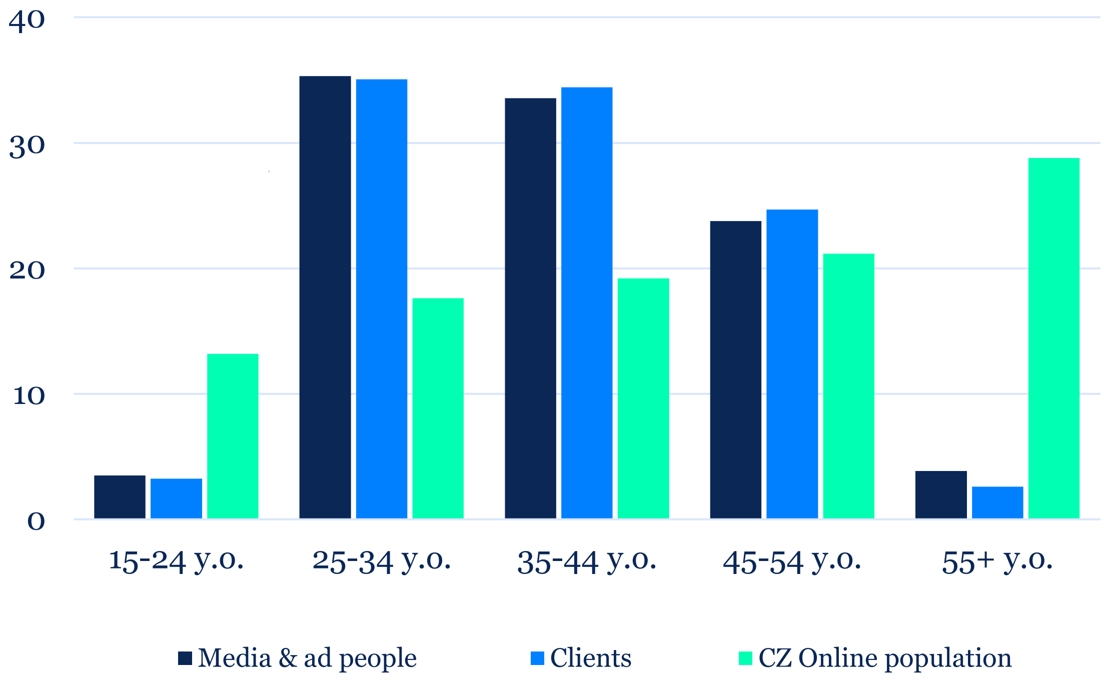
If you do not want to read more than 6 slides

HOW DOES OUR BUBBLE DEMOGRAPHICALLY DIFFER FROM THE POPULATION

While we find a female majority in a number of professions, the age difference compared to the general Czech population is of greater importance here. And as you will read on the following pages, our media habits are even younger than our average age.

Gender | in %

Age | in %



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In the report, we divided the general population into 3 age subgroups (15-25, 26-44 and 45+). As most media agencies workers and clients are in the 25 – 44 y.o. age group, we can compare it with the population in this way most effectively.

WHAT DO MEDIA AGENCIES AND THEIR CLIENTS DO DIFFERENTLY?

Forever young = up to 30 y.o. max.

- We really do love influencers
- We just cannot live without Instagram
- We can easily survive without TV broadcasting
- On the other hand, we do not miss anything on Netflix and HBO
- We love listening to music in apps or on the net

As educated Prague inhabitants

- Almost all of us have a university degree (80-90%) - the Prague average is 38%, while in the Czech Republic, except Brno, it's below 20%
- We see the future much brighter (and we are better off)
- We are not afraid of artificial intelligence
- We love podcasts
- We follow news about domestic and foreign events intensively
- We would love to save the whole world

WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE MOST 1/3

Compared to the general population, media & ad people, advertisers and even their clients do not enjoy classical TV (or delayed broadcasts), but we feel at home on Netflix or HBO. As for the YouTube, we are just average young and in terms of interest in news, we are beyond any age group.

Activity (in %)	**KPI**	**Media & Ad Agencies**	**Clients**	**General population**	**Youth up to 25 y.o.**
Watching TV Broadcasting live	**Several times a week**	**44**	**48**	**65**	**37**
	Daily	24	20	48	18
Watching free of charge TV Broadcasting via TV stations web pages	**Several times a week**	**14**	**20**	**34**	**25**
	Daily	6	7	17	12
Watching TV programs or films via paid online video streaming platforms (Netflix, HBO etc.)	**Several times a week**	**69**	**68**	**40**	**53**
	Daily	28	26	17	25
Watching video content on the Internet (i. e. YouTube etc.)	**Several times a week**	**66**	**60**	**59**	**78**
	Daily	35	33	31	55
Following the news and information about current affairs on the Internet	**Daily**	**70**	**71**	**51**	**31**

WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE MOST 2/3

We also listen to music a lot more through apps as well as to podcasts. We follow influencers intensively and love Instagram. In that we are similar to young people under 25 y.o., but it seems we missed the TikTok rise so far.

Activity (in %)	**KPI**	**Media & Ad Agencies**	**Clients**	**General population**	**Youth up to 25 y.o.**
Listening to the music via Internet or via apps (i.e. Apple Music, Spotify)	**Several times a week**	**78**	**81**	**42**	**78**
	Daily	55	56	24	61
Listening to podcasts	**Several times a week**	**46**	**47**	**23**	**36**
	Daily	27	23	9	17
Following influencers	**Yes**	**59**	**72**	**29**	**71**
Using social networks	**Daily**	**84**	**86**	**71**	**86**
Using Instagram	**Daily**	**73**	**85**	**51**	**90**
Using Tik Toku	**Daily**	**12**	**23**	**17**	**45**

WHERE THE MEDIA BUBBLE DIFFERS FROM THE GENERAL POPULATION THE MOST 3/3

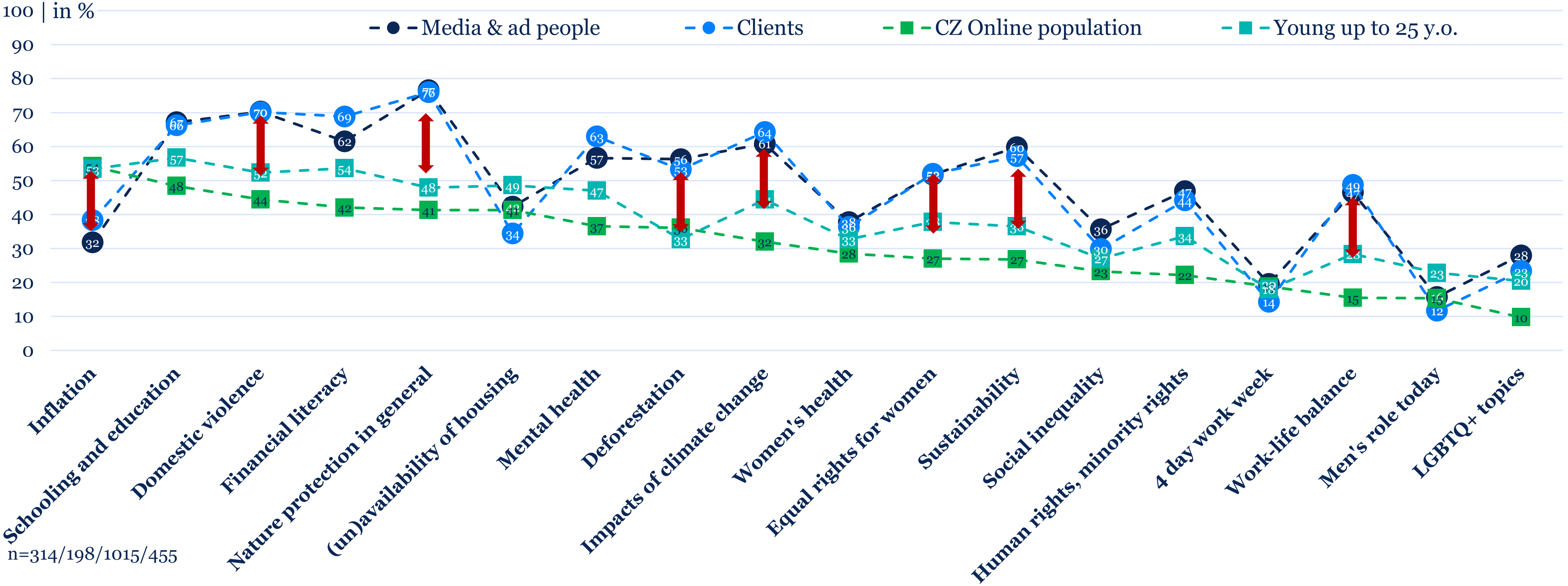
There are other areas where young people have overtaken us - in playing electronic games on mobile phones or even on consoles. On the other hand, in reading printed magazines, we are similar to the older part of the general population, and our clients also listen intensively to the radio.

Activity (in %)	**KPI**	**Media & Ad Agencies**	**Clients**	**General population**	**Youth up to 25 y.o.**
Listening to the radio	**Several times a week**	**34**	**48**	**54**	**28**
	Daily	20	31	36	14
Reading magazines offline	**At least once a month**	**47**	**47**	**49**	**38**
	Weekly	20	14	31	19
Playing electronic games on mobiles	**Several times a week**	**20**	**18**	**35**	**45**
	Daily	12	12	22	27
Playing electronic games on PC or consoles	**Several times a week**	**14**	**15**	**21**	**34**
	Daily	4	1	11	20
Playing board games	**At least once a month**	**47**	**44**	**43**	**55**
	Weekly	15	9	19	22

THE IMPORTANCE OF SOCIETAL ISSUES

WHAT PERCENTAGE CONSIDER THE TOPIC IMPORTANT, SORTED BY POPULATION

Media & ad people are more or less in line with clients, but we are very far from the general population, including young people under 25. If you think that it is a matter of education, then you will have to read the relevant part of the report just to find out that it is not (from slide 57 onwards).



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TO PUT IT IN A SIMPLE WAY

A job in a bubble of media & ad agencies and their clients (= people from marketing) makes you younger, more optimistic and you want to save the world!

THEREFORE, THE KEY QUESTION IS

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

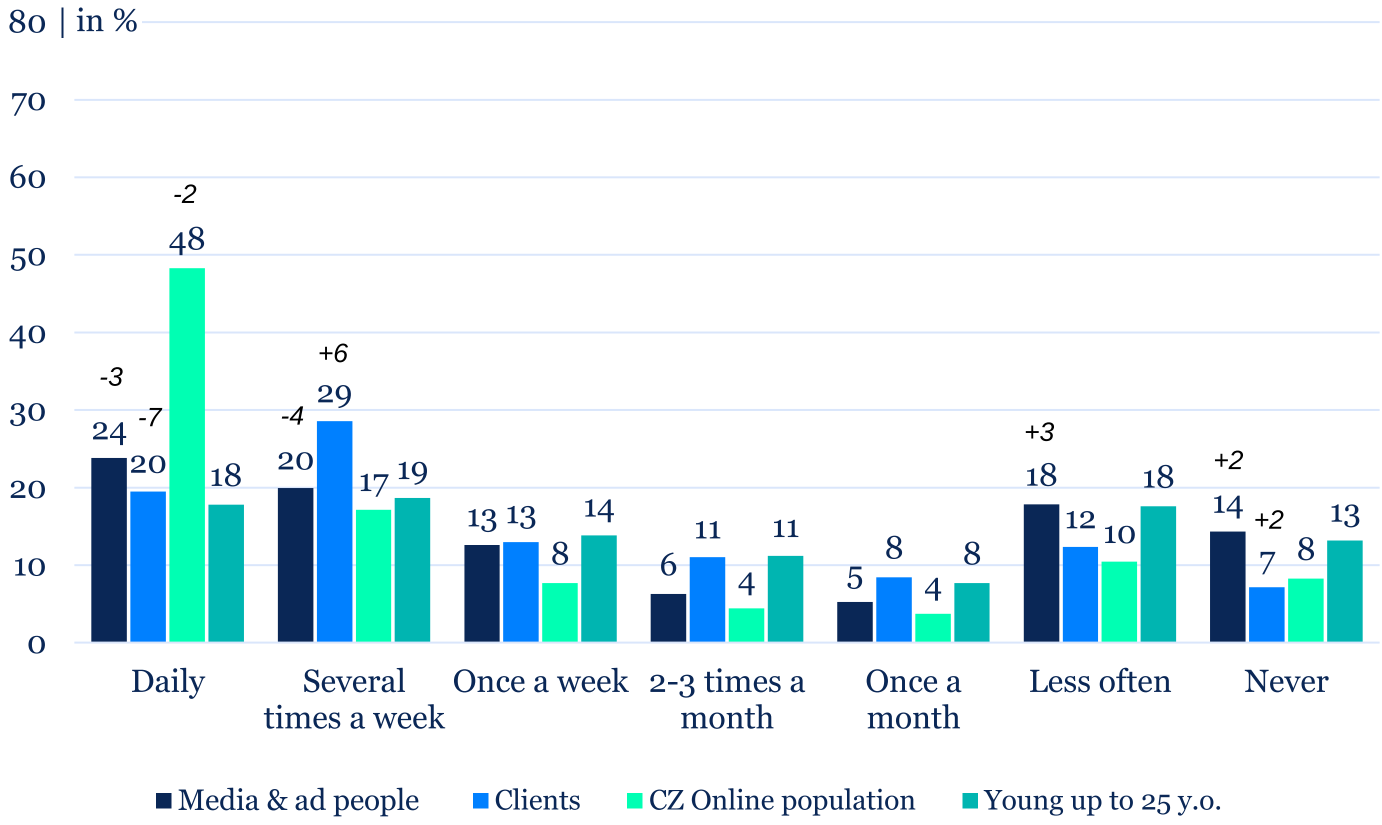
WATCHING TV

After all, classical TV is sooooo old-fashioned and only retired people watch it. Or not? Well, the media & ad people with their clients definitely do not sit by the TV set.

WATCHING LIVE TV BROADCAST, IN REAL TIME

Less than half of the population watches TV every day and another almost a fifth several times a week. It's only 24% and 20% per day among media & ad people and their clients. Conversely, a third of us watch TV less often than once a month or not at all (compared to 18% of the population). This again makes us resemble the youngest part of the population.

Therefore, if we succumb to the "instinct" in case of watching TV, we could easily conclude, that TV is not really important at all.



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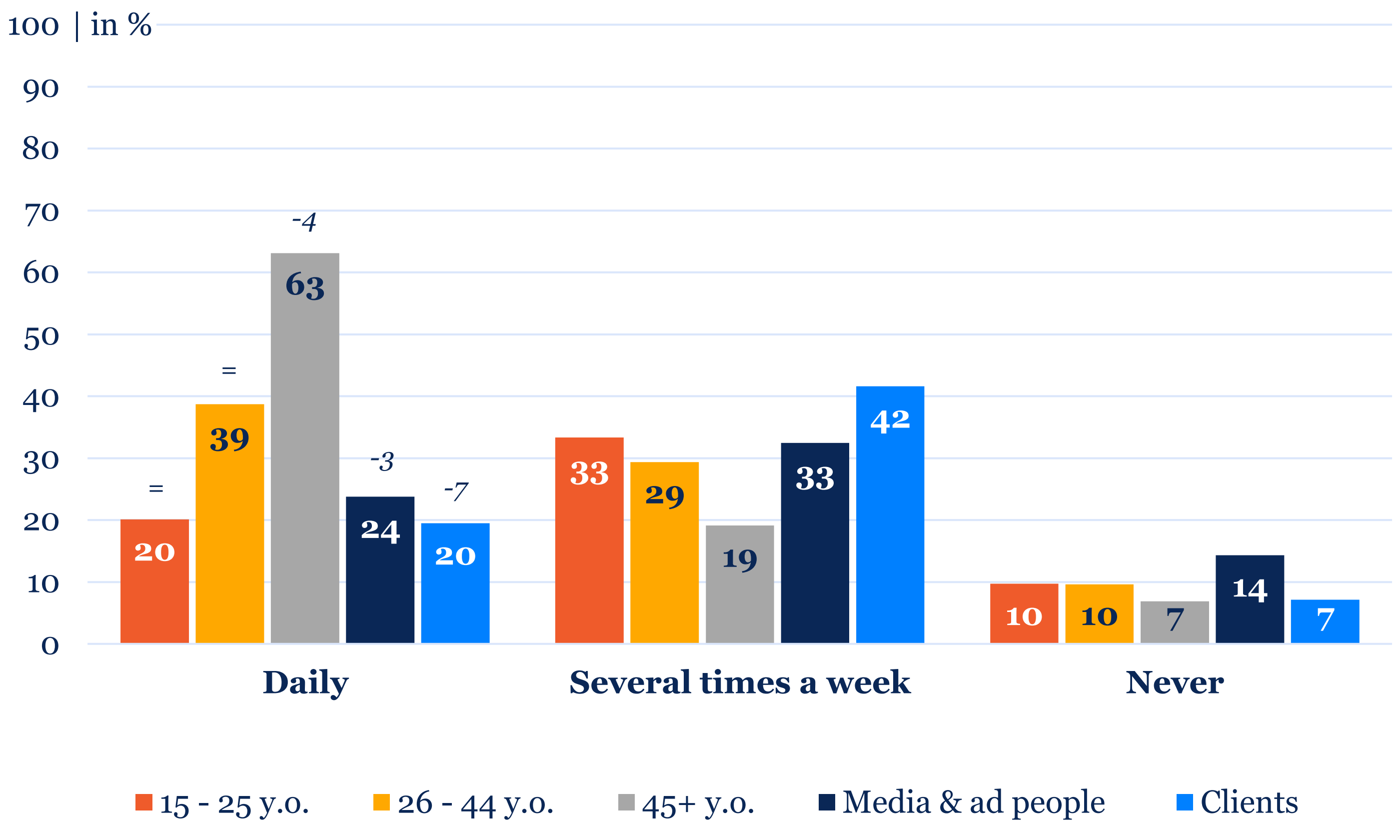
Numbers in italics above graphs = significant differences versus 2021

WATCHING LIVE TV BROADCAST, IN REAL TIME

Our TV habits are most similar to the youngest age group under 25 y.o.!

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



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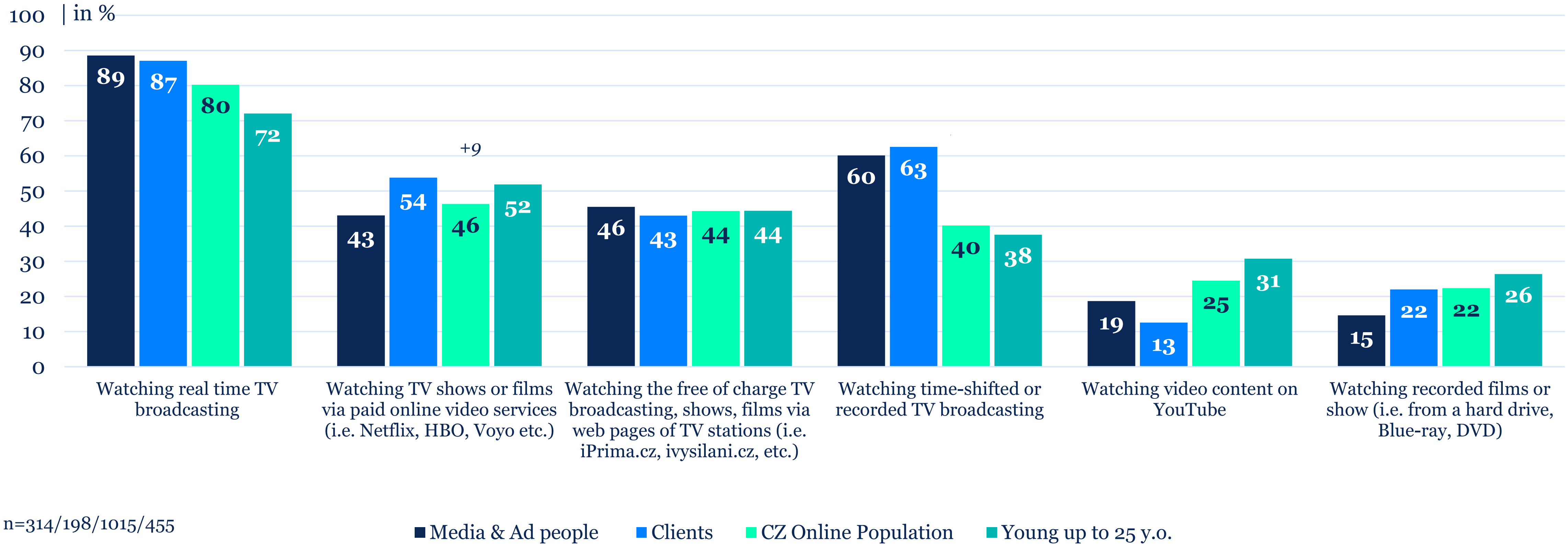
Numbers in italics above graphs = significant differences versus 2021

WATCHING TELEVISION, WHAT DOES THE TERM MEAN

In our surveys, we often ask whether people watch TV. Nonetheless as with other terms where "everyone knows what that means," it is good to ask what it is really like from time to time. Although, watching TV is still associated mainly with live broadcasting, for almost 1/2 of people it means also watching paid video services like Netflix. For media & ad people and their clients, it's often about delayed broadcasting (not so much for the general population).



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Numbers in italics above graphs = significant differences versus 2021

VOD

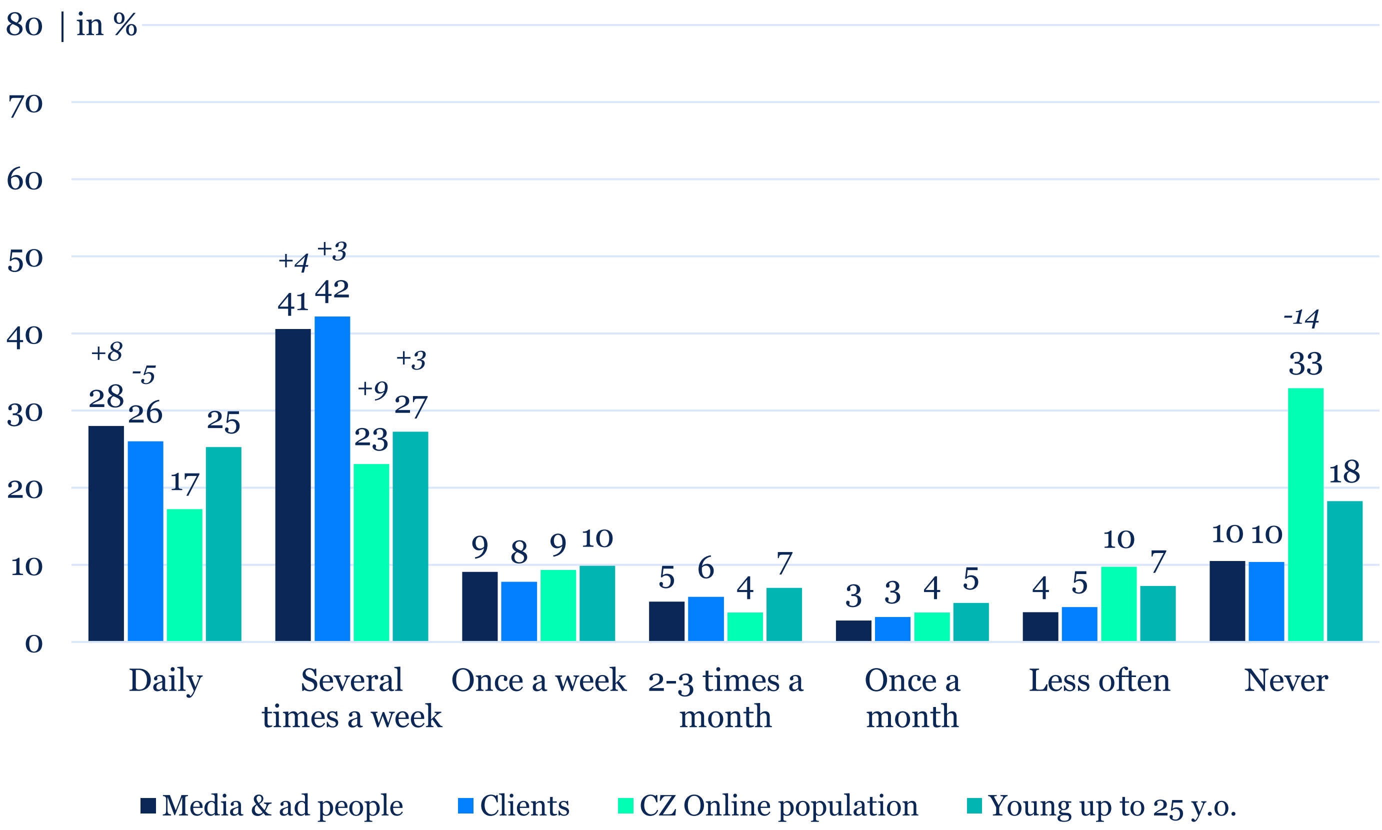
You have no idea what is the current top ten on Netflix? Don‘t you have Netflix? Then you are probably not a media & ad person or our client. But what about the general population?

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

In the intensity of watching Netflix, HBO and similar services, both media/ad people and clients differ fundamentally from the general population. This also explains why they watch less TV (there is no time for it). 69% of media & ad people and 68% of their clients watch VOD services at least several times a week.

As such, media & ad people with their clients surpass even the youngest generation.

Within the whole population, 40% of people already watch VOD services several times a week, which is an increase of 9 p.p. in 2 years.



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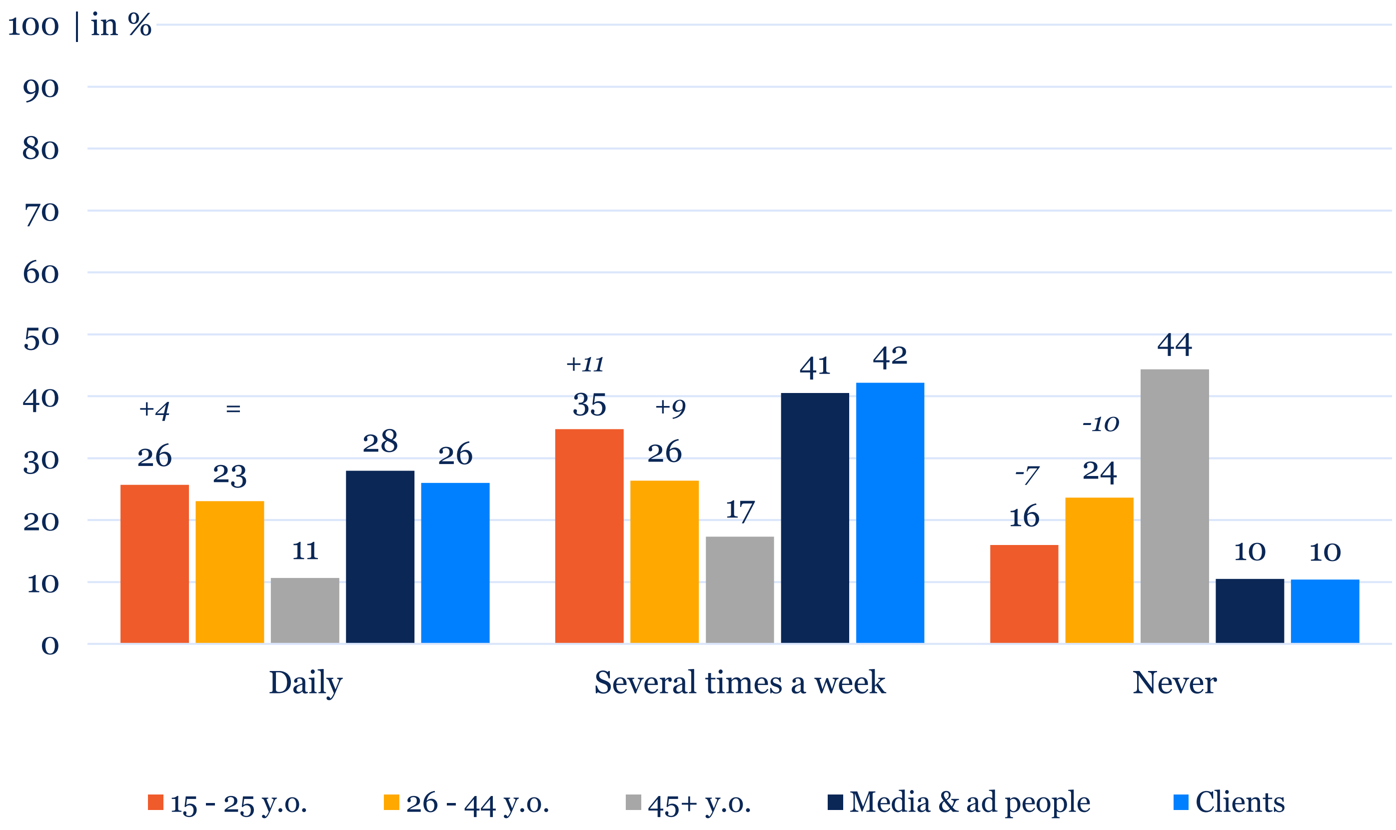
Numbers in italics above graphs = significant differences versus 2021

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

Netflix and HBO run almost daily in our homes. Even the youngest generation can't keep up with us.

From the age subgroups detail it is also clear that these are mainly people under 44 y.o. that are running away from media types, where we can hit them with advertising, to paid video services.

Compared to 2021, paid video services also strengthened among the middle generation (daily + several times a week 49% vs. 40% in 2021), as well as among the 45+ generation (29% vs. 18%).



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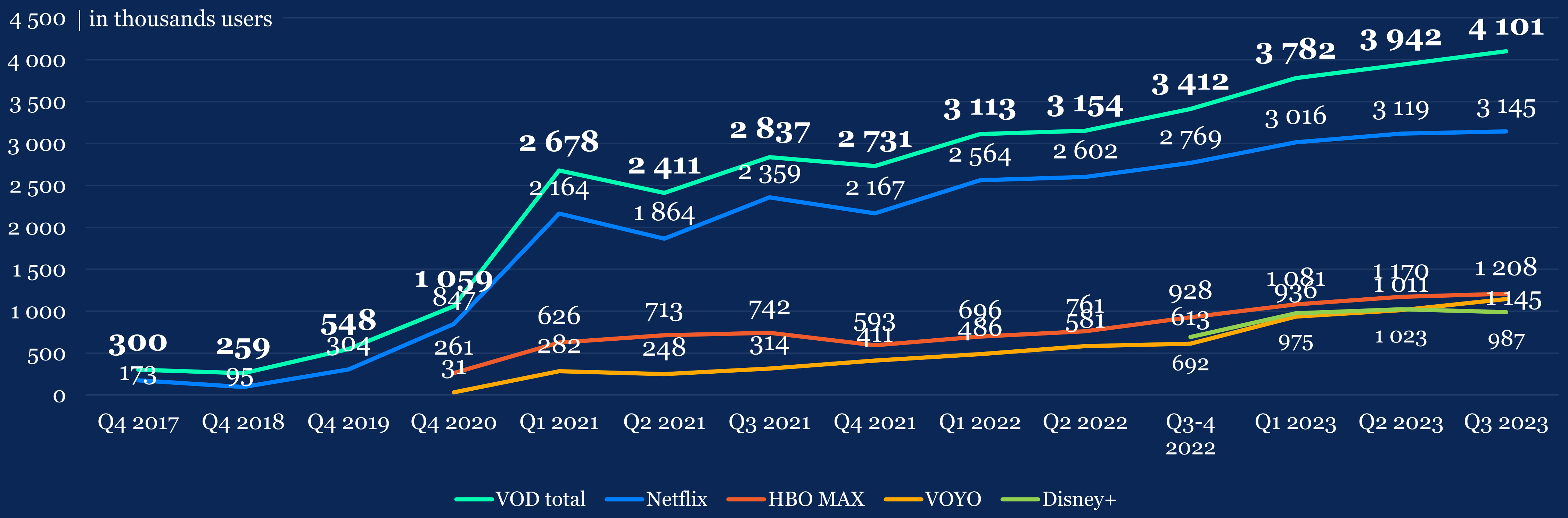
Numbers in italics above graphs = significant differences versus 2021

NUMBER OF VOD USERS

IF THERE WAS NO COVID, IT WOULD HAVE TO BE INVENTED BY NETFLIX

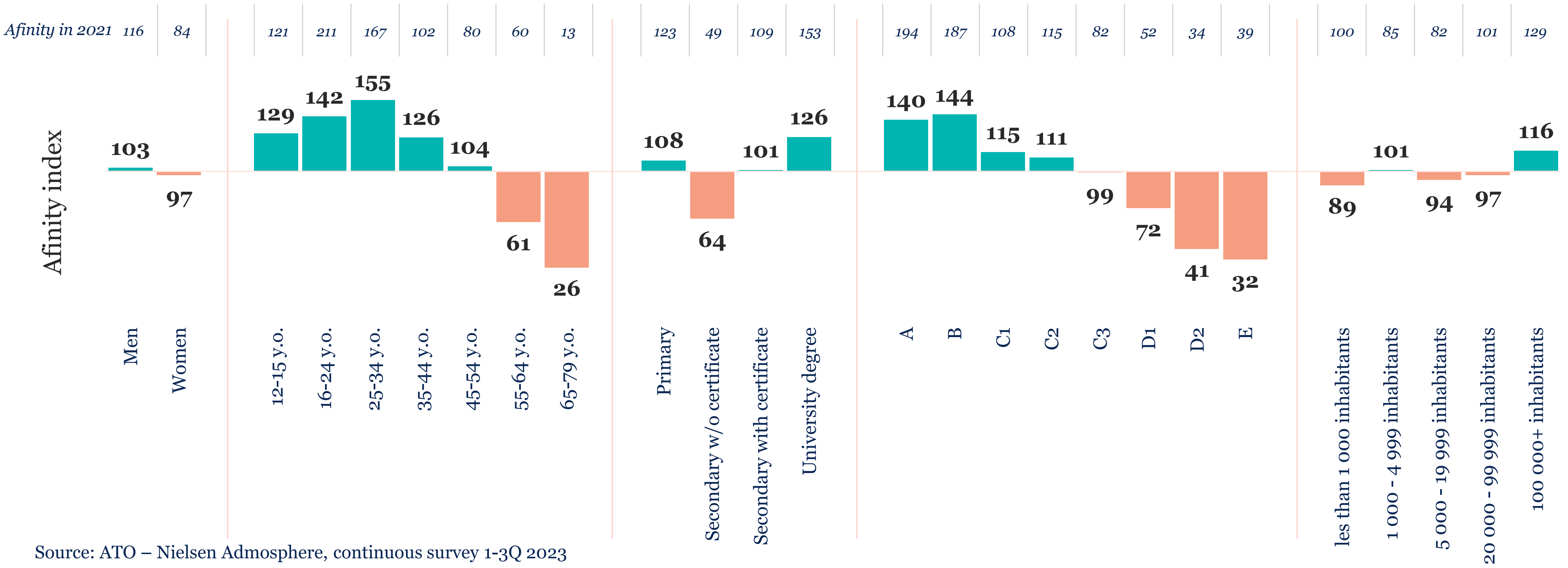
VOD services have seen a huge jump thanks to Covid, but user growth continues, albeit at a slower pace. From the point of our profession's view, this means that the proportion of the population that spends more and more time where we can hardly reach them with advertising is still growing.



Source: ATO – Nielsen Admosphere, Continual Survey 2017 - 2023

WHO ARE THE PEOPLE USING VODs

It is still true to some extent that the VOD audience is younger, richer and with higher education. And even if it is not as significant as 2 years ago, we have to hunt this more affluent target group much laboriously in other media types.



Source: ATO – Nielsen Admosphere, continuous survey 1-3Q 2023

INFLUENCERS

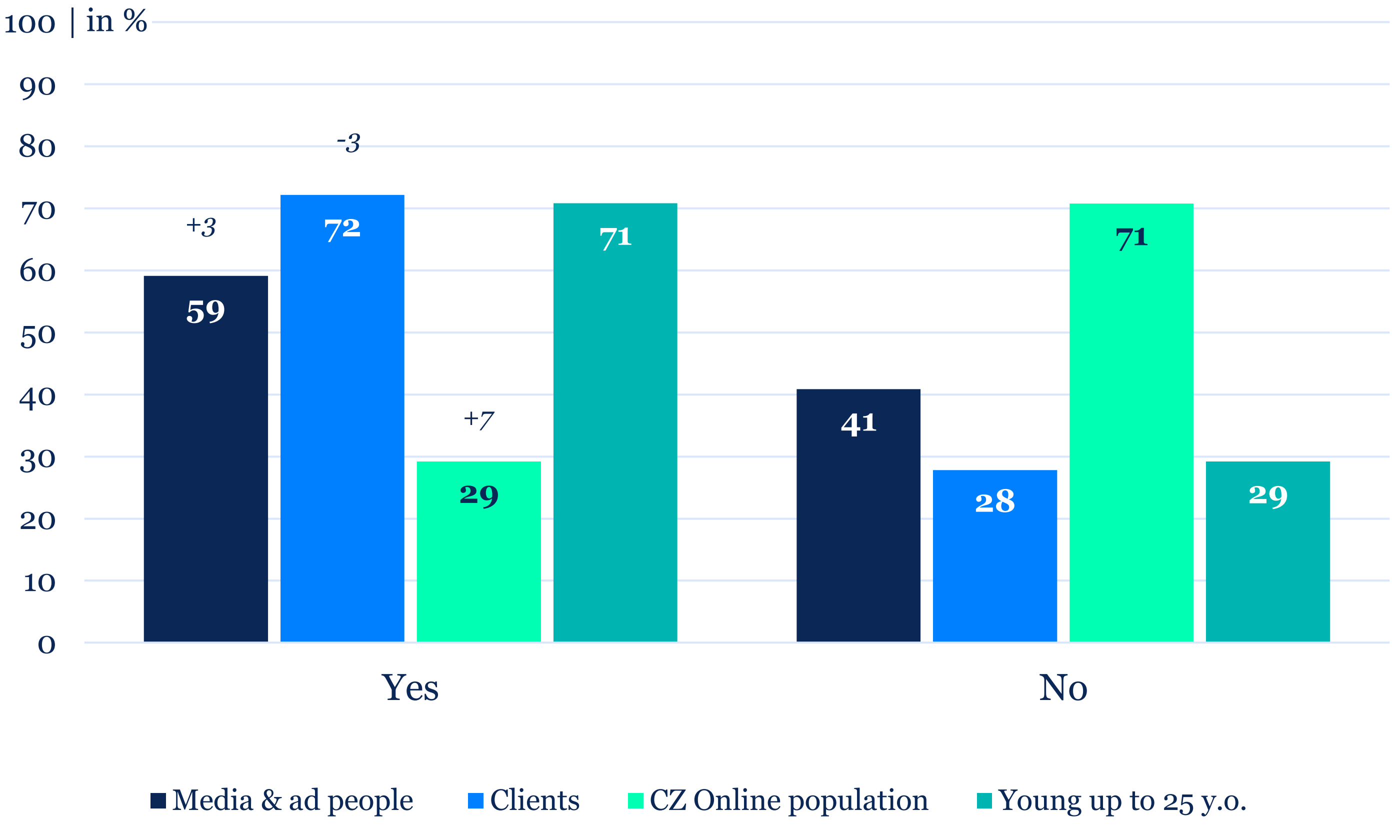
Anyone who does not use influencers is not a marketer. And anyone who does not follow them is totally weird. Or is it not so? Media & ad people with their clients definitely do follow influencers intensively, but how much do people from the general population enjoy them?

FOLLOWING INFLUENCERS

Among media & ad people, 60% of them follow influencers, among clients it's 3/4 (when they already pay them, they also follow them) - both figures without a change compared to 2021.

In the general population, however, only 29% of people follow influencers (although this is +7 p.p. compared to 2021).

Among young people under the age of 25, however, 71% of people follow influencers - almost like among our clients!



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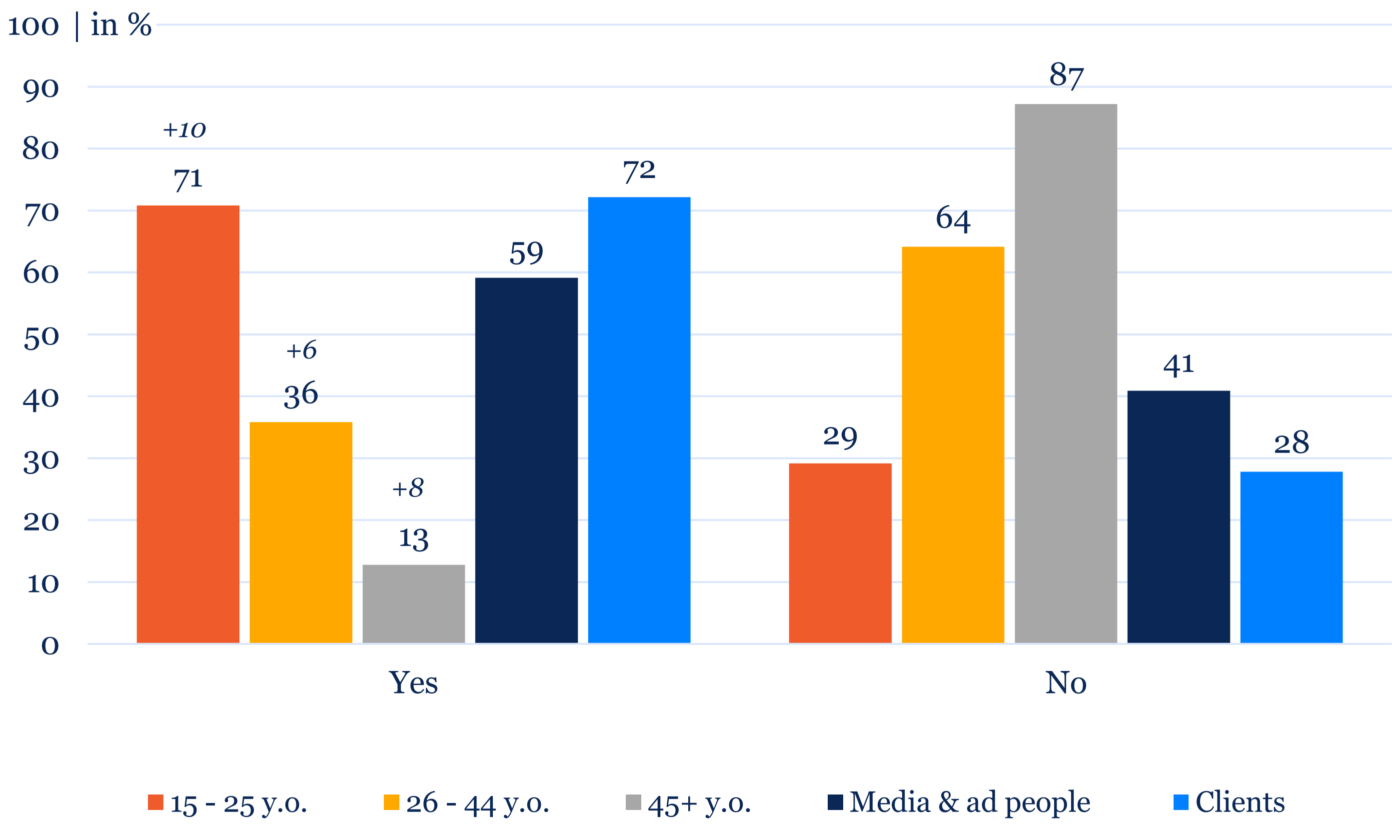
Numbers in italics above graphs = significant differences versus 2021

FOLLOWING INFLUENCERS

Young people have caught up with our marketing bubble (especially the clients' one), but influencers are slowly taking root among the majority population of 45+ as well.

Only those of us who are (or have already been) 45+ follow influencers a little less, but it's still at the level of people from general population in their thirties – and it's even stronger among clients.



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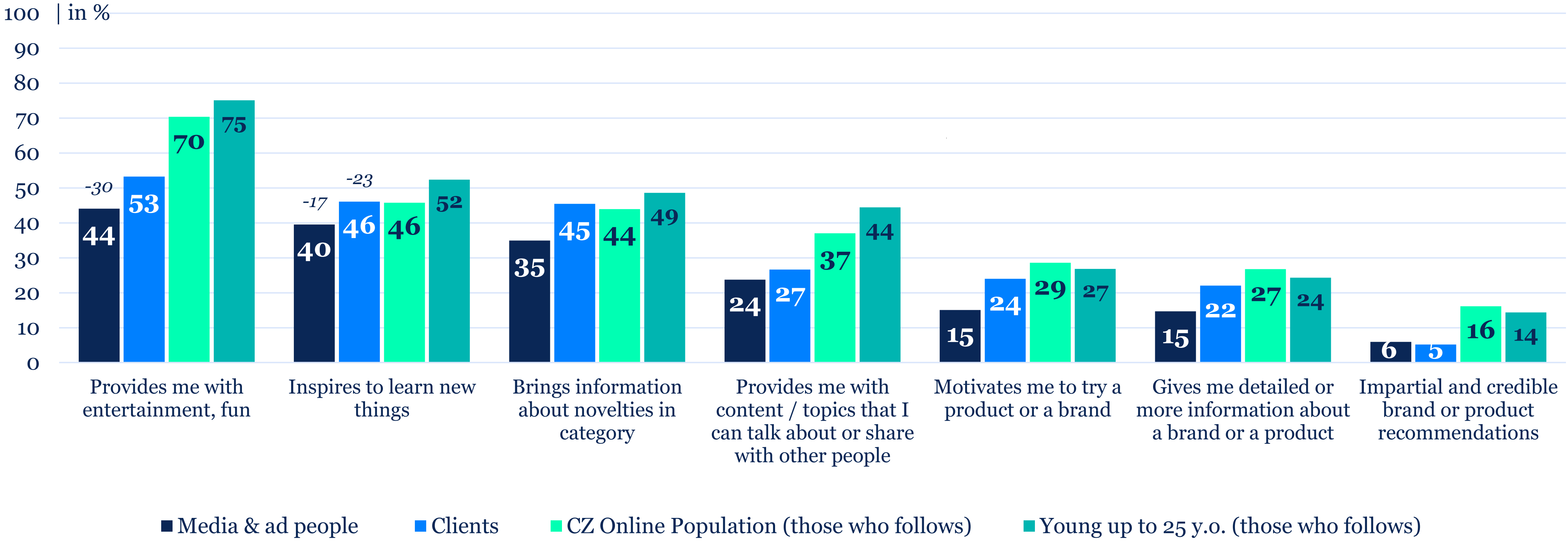
Numbers in italics above graphs = significant differences versus 2021

WHAT ARE WE FOLLOWING INFLUENCERS FOR

We watch influencers together with our clients like crazy, but we don't really enjoy it that much anymore - it's often just work (the entertainment benefit has dropped significantly in both groups since 2021). On the contrary, for the common people, influencers are mainly entertainment (without change) and they also inspire and inform.



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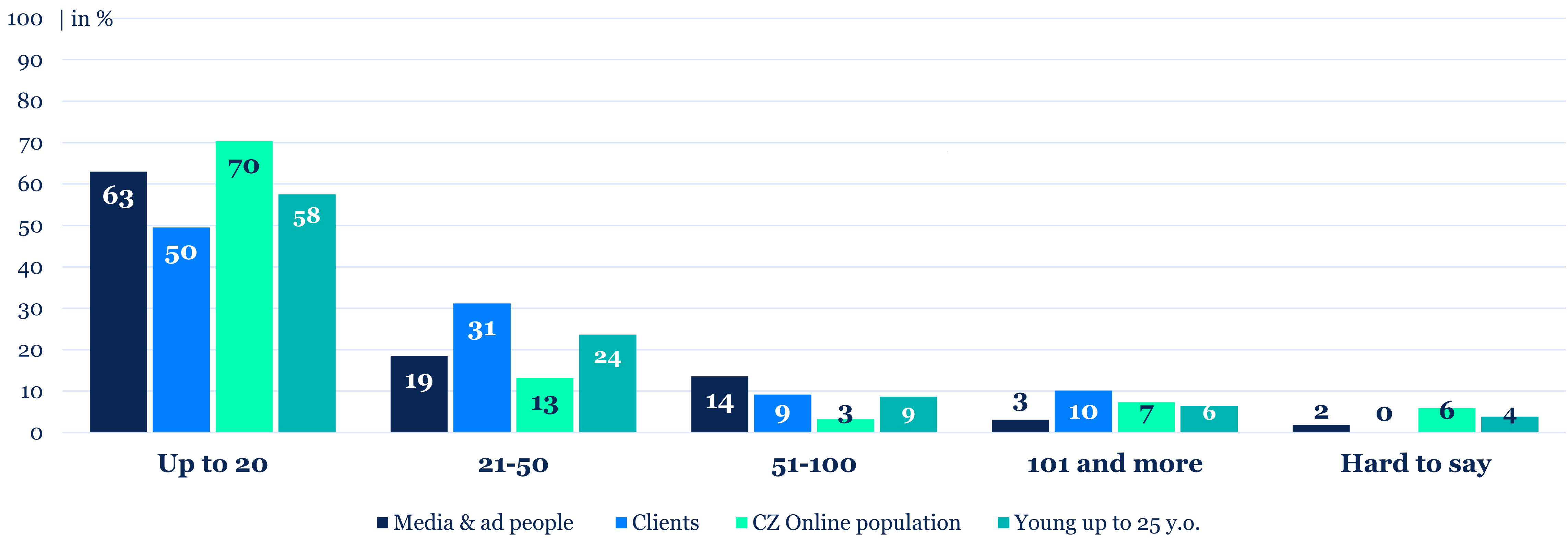
Numbers in italics above graphs = significant differences versus 2021

HOW MANY INFLUENCERS DO WE FOLLOW(=REALLY REGULARLY)

The vast majority of people follow up to 20 influencers. Among clients, it's markedly - but as you saw on the previous slide, the fun obviously decreases as the number of influencers followed increases.



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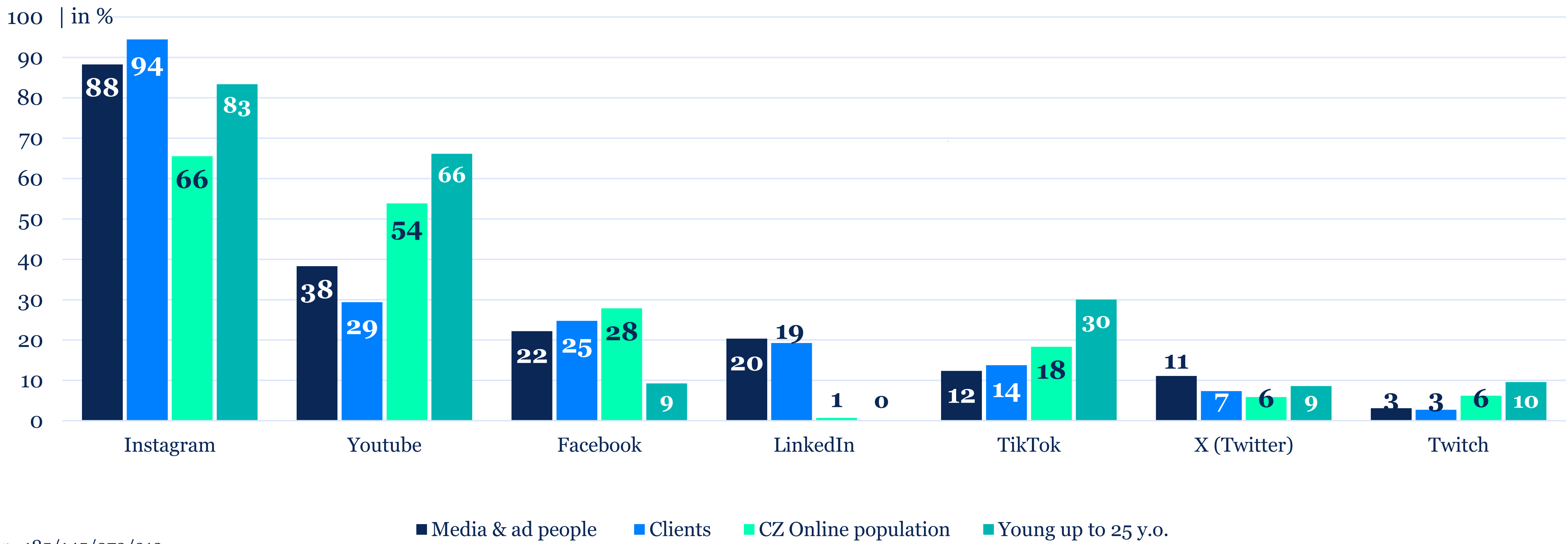
WHERE DO WE FOLLOW INFLUENCERS

While media & ad people with their clients follow influencers by far the most on Instagram (which they also use much more), the general population often follows them on YouTube as well (younger people on TikTok). Compared to 2021, Facebook fell (-5 p.p.) and, conversely, TikTok grew.



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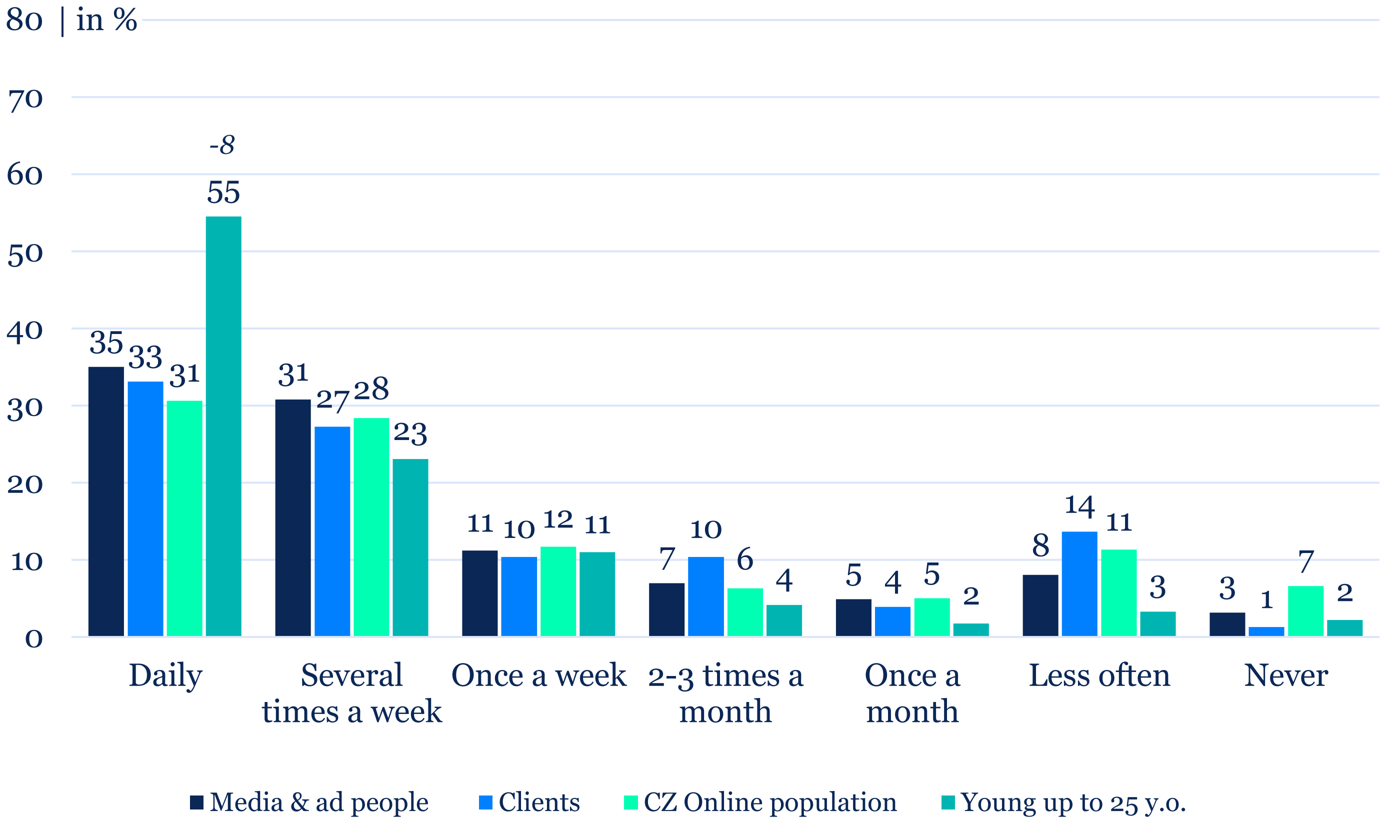
ONLINE VIDEO

Who watches YouTube more and who blocks ads

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

This is where a change happened – the general population has caught up with us and is already watching online videos as often as we do.

The main difference here is between young people under 25 and others (including us) - more than half of young people watch online videos daily, but even this is a decrease of 8 p.p. compared to 2021.



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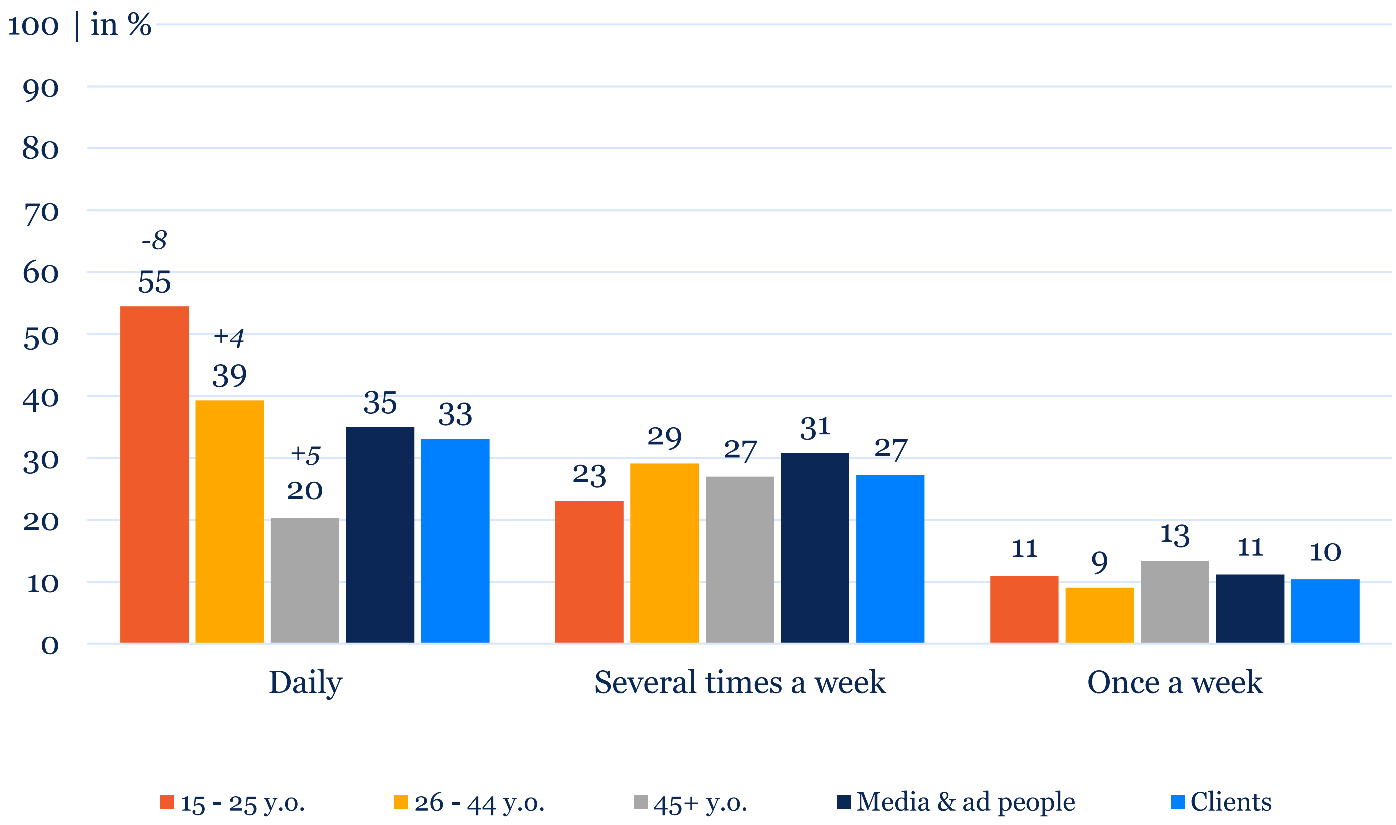
WATCHING VIDEO CONTENT ON THE INTERNET
(E.G. YOUTUBE, ETC.)

When watching online videos, we are just of “average youth” (26-44 years old - that is, exactly how old we usually are according to the calendar).

Although we can’t keep up with the youngest group of the population, they are losing their vigor in this area s well and are shifting to other networks.



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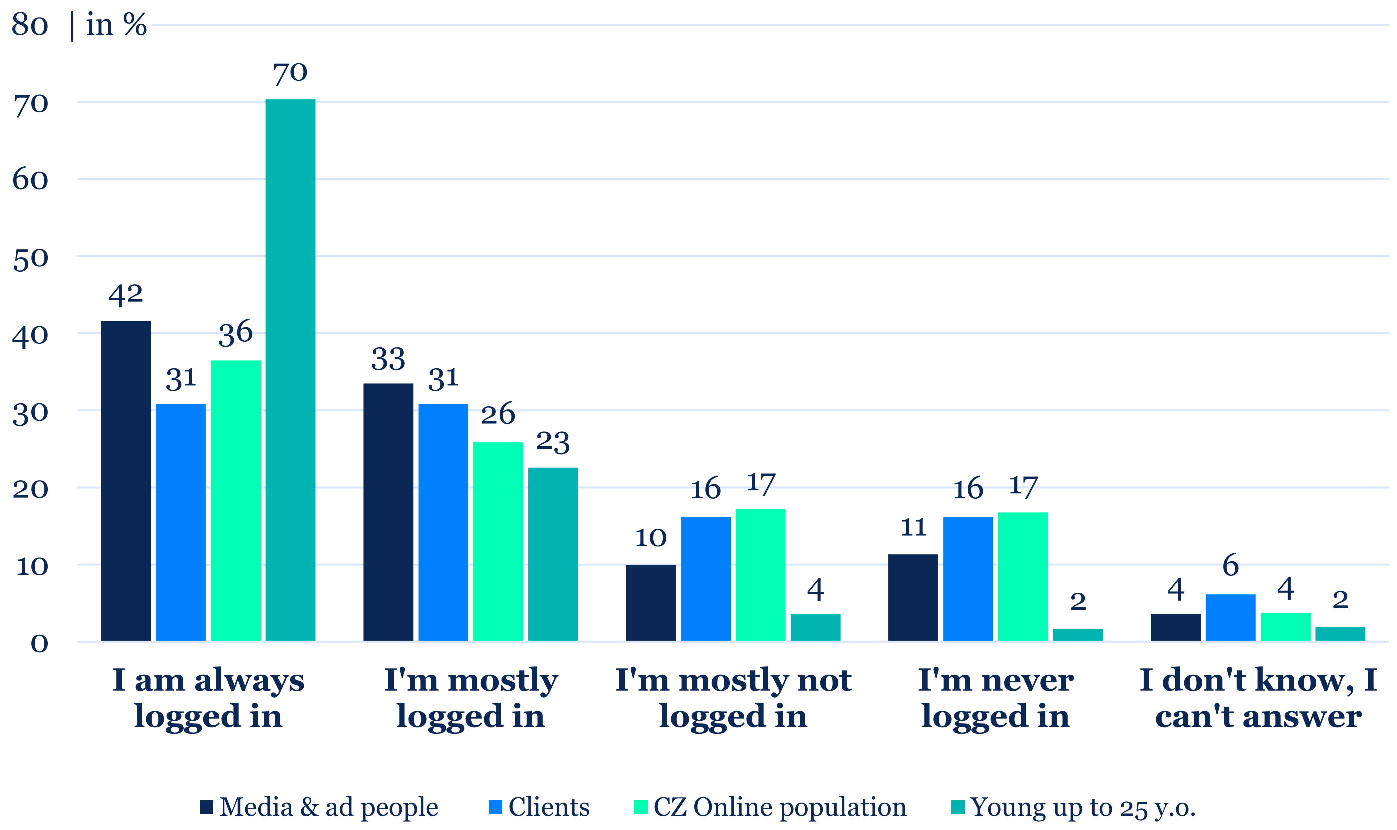
WHEN WE WATCH YOUTUBE, SO HOW

As media & ad people, we are very interested in how much and how accurate information about themselves people voluntarily leave on the Internet.

The first thing we were interested in was how people watch YouTube. Among young people under the age of 25, practically everyone is logged in while watching it.

Among media & ad people it's 3/4 and among our clients it is 60%.



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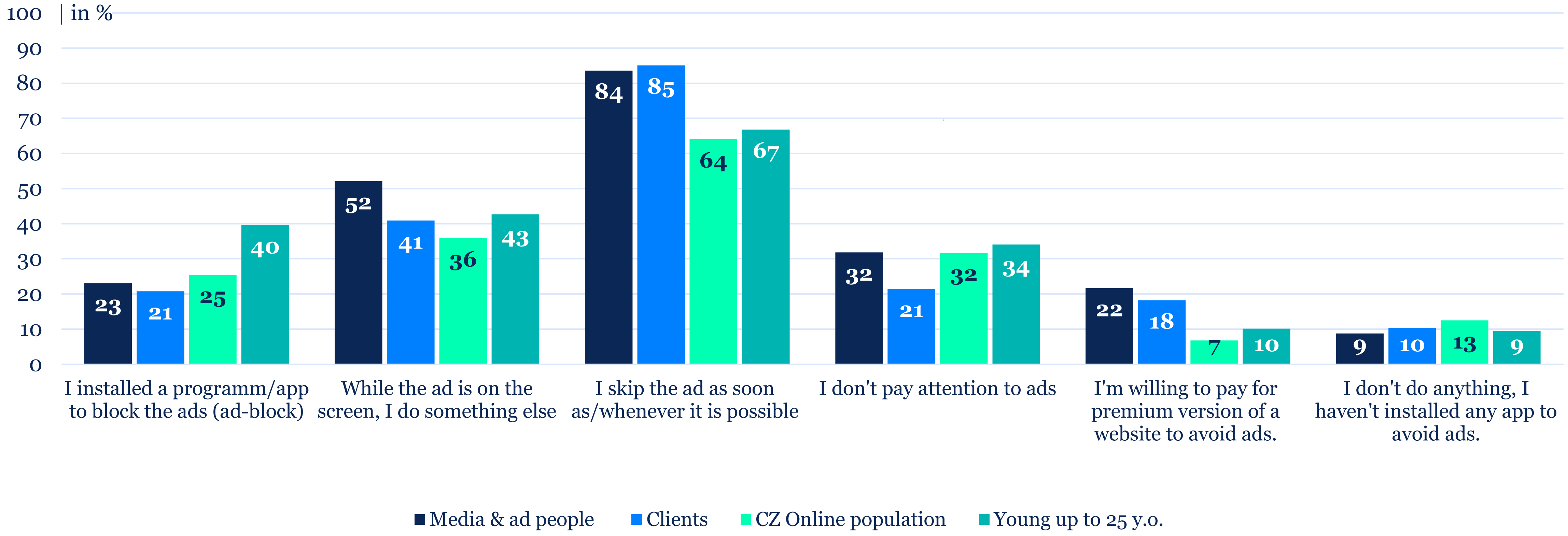
MEASURES TAKEN TO AVOID ONLINE ADVERTISING

We generally take similar measures in online ad avoidance as the general population, but media & ad people with their clients are more likely to pay extra for the ad-free premium version and they are more frequent “ad skippers”. The "occurrence" of individual measures is surprisingly stable - practically unchanged since the first wave of Media Bubbles in 2019.



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SOCIAL NETWORKS

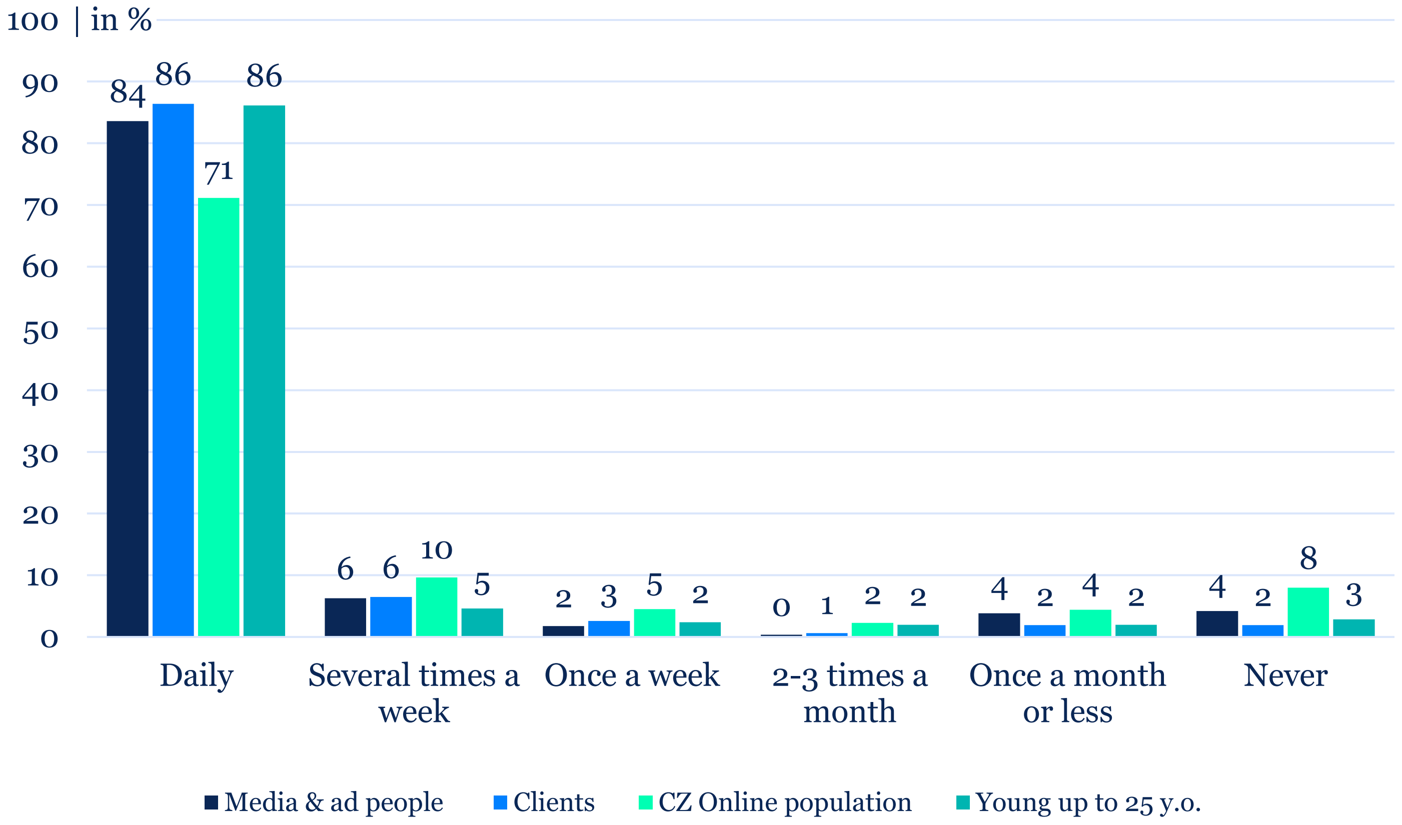
Where we keep up with the young
and where we missed the boat?

USE OF SOCIAL NETWORKS

Purely in terms of daily reach, we use social media just like the general population.

However, there are differences in individual social networks usage - see next slides.

There were no major changes compared to 2021.



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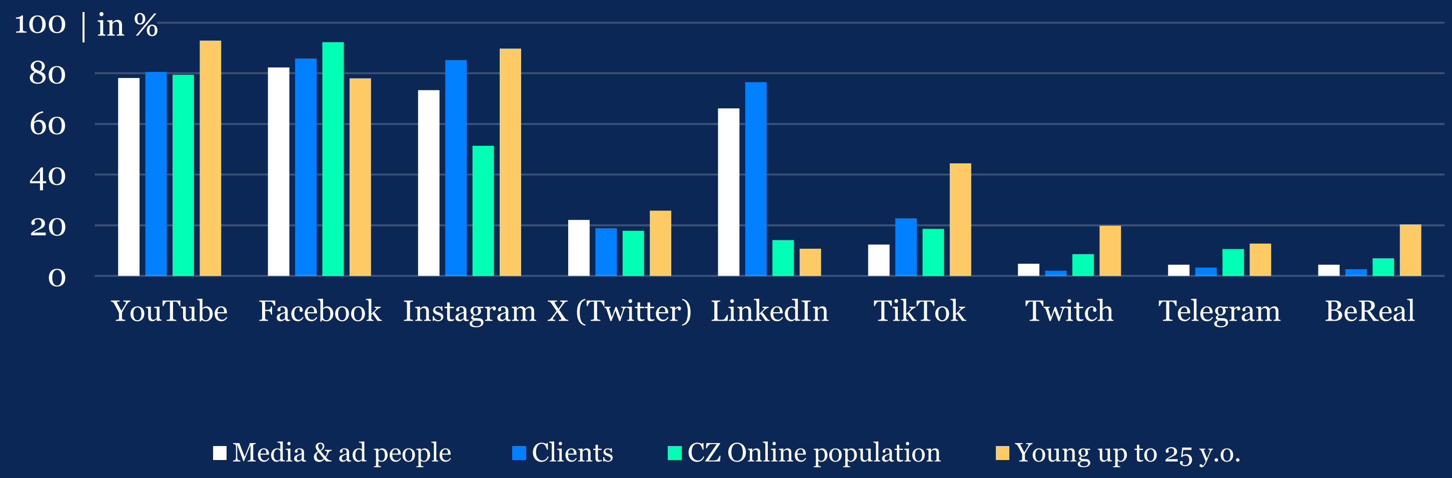
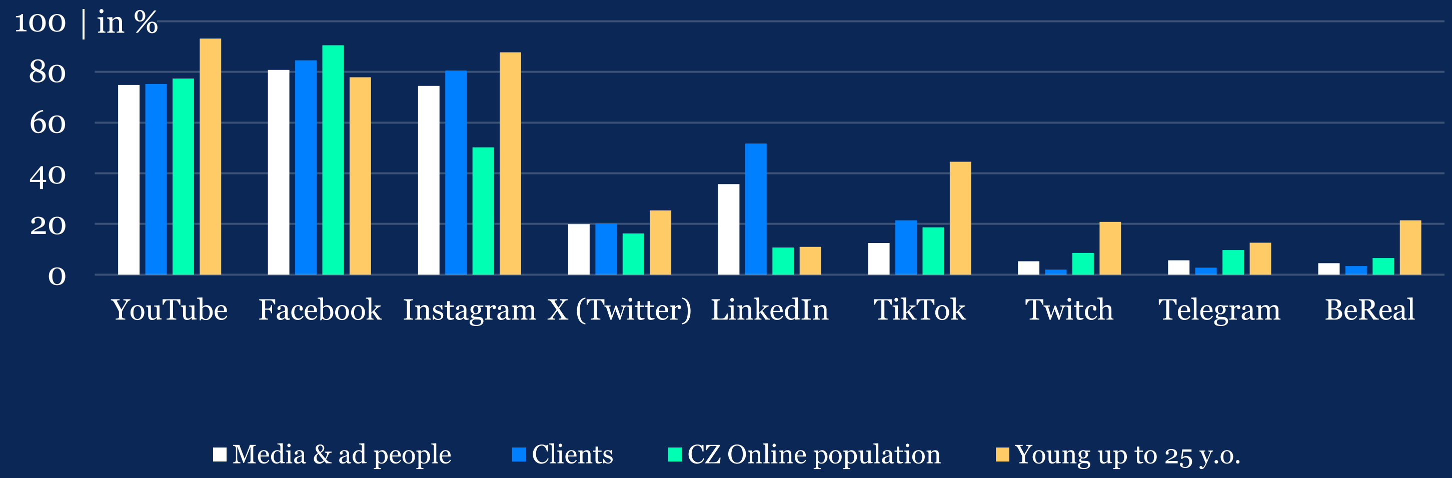
SOCIAL NETWORK USAGE
(DAILY USAGE)

Although media & ad people with their clients use Facebook and YouTube slightly more than the general population, the main differences are in case of Instagram, LinkedIn and also TikTok.

Working day



Weekend

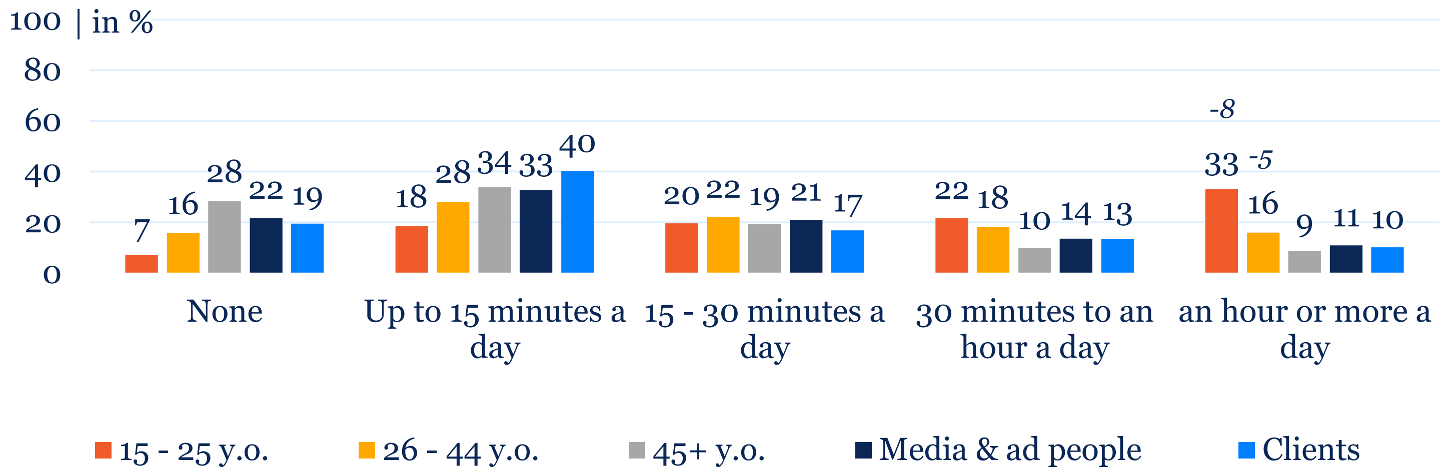


TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: YouTube

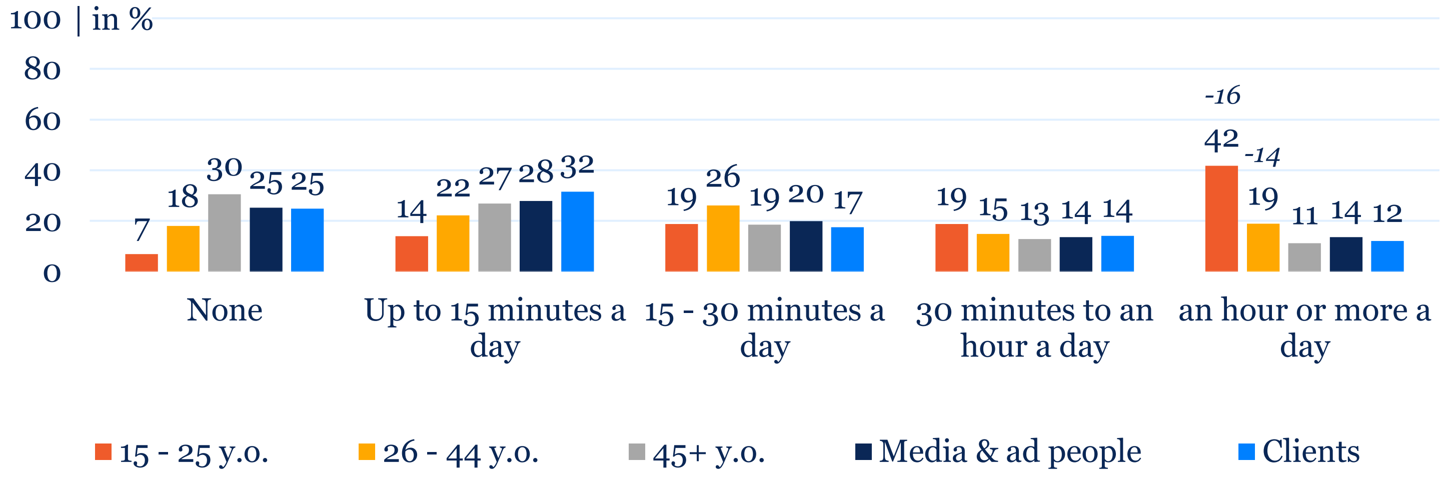
As can be seen from the time spent, we are more like the mid generation in case of YouTube watching. Compared to 2021, we have slightly reduced the intensity of YouTube watching.

However, the main drop in viewing intensity compared to 2021 is among young people who focused their attention on other platforms.

Working day



Weekend

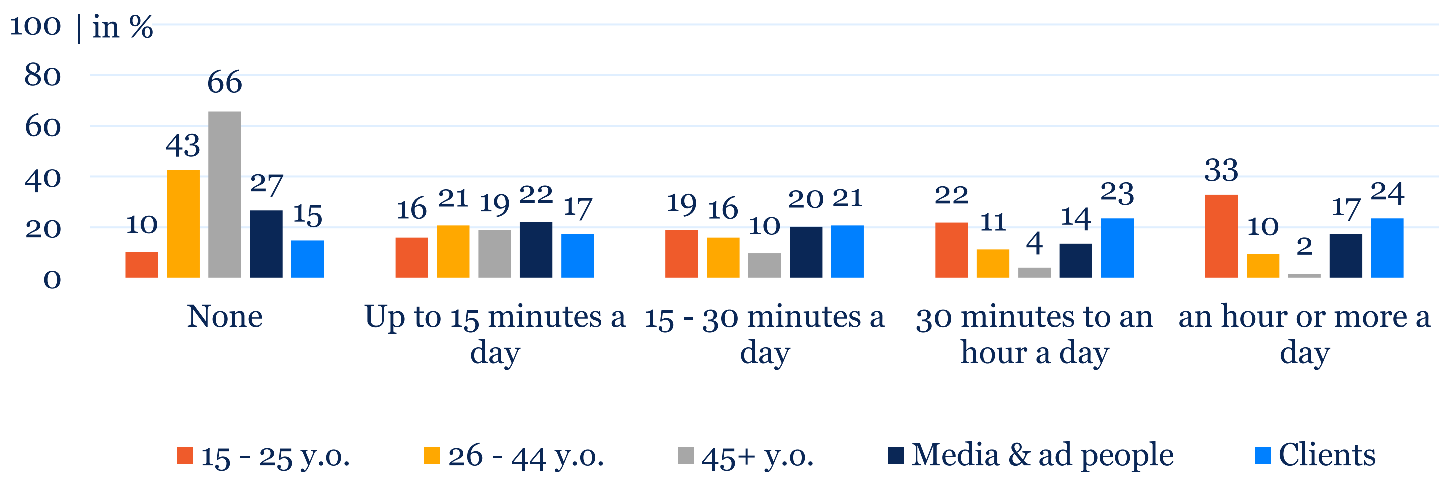


TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: Instagram

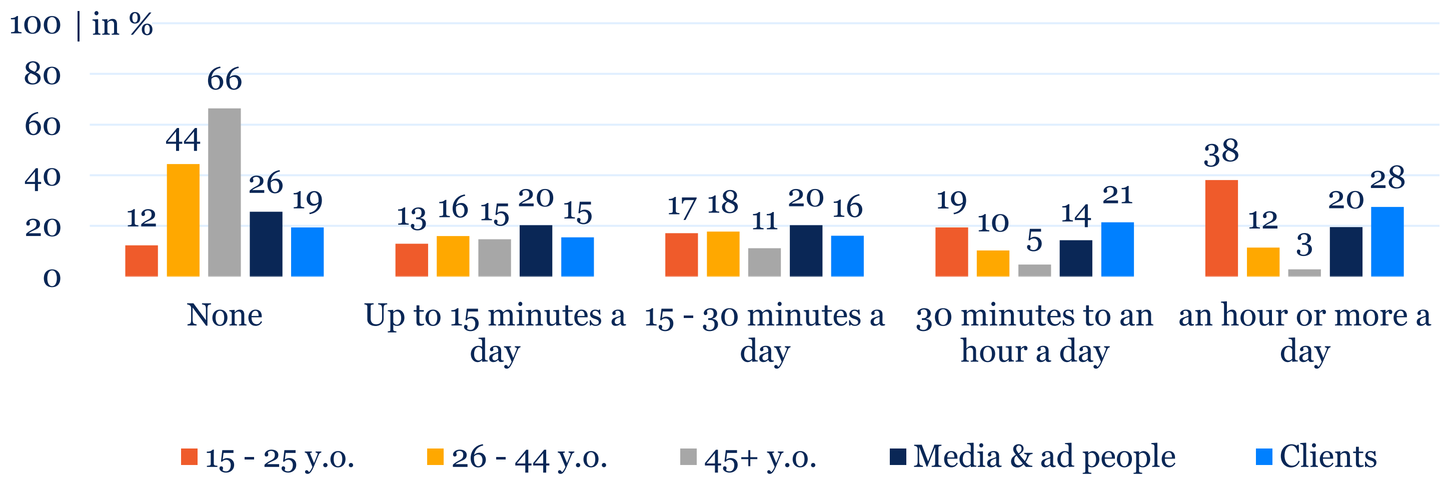
But we just love spending time with Instagram. In the time spent, we reach almost to the levels of youngest group under 25 years.

There are no significant changes compared to 2021.

Working day

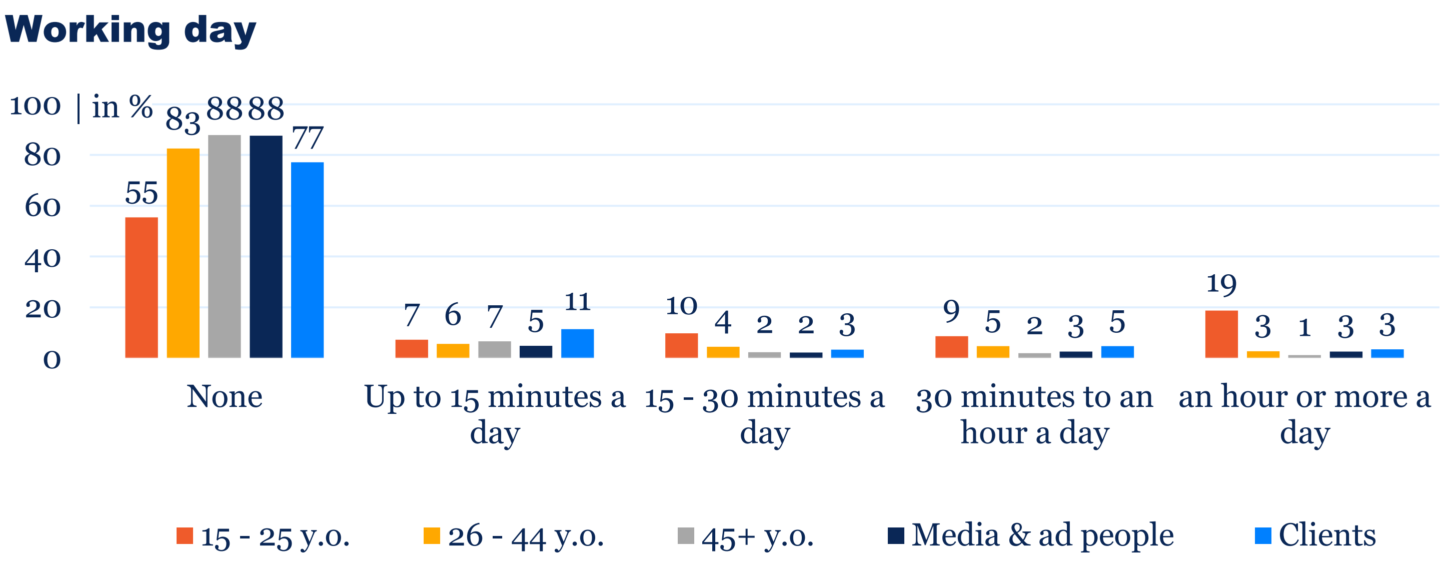


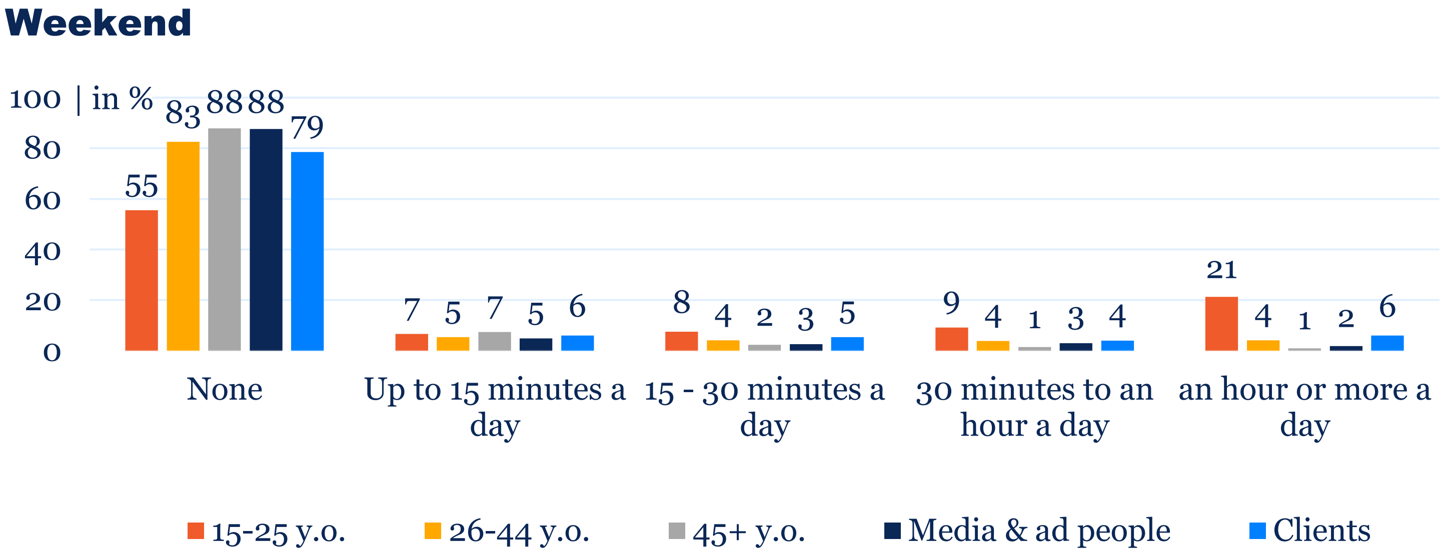
Weekend



TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: TikTok

TikTok still eludes us to a great extent. We are not even remotely close to young people here. Clients try harder, but still weak.



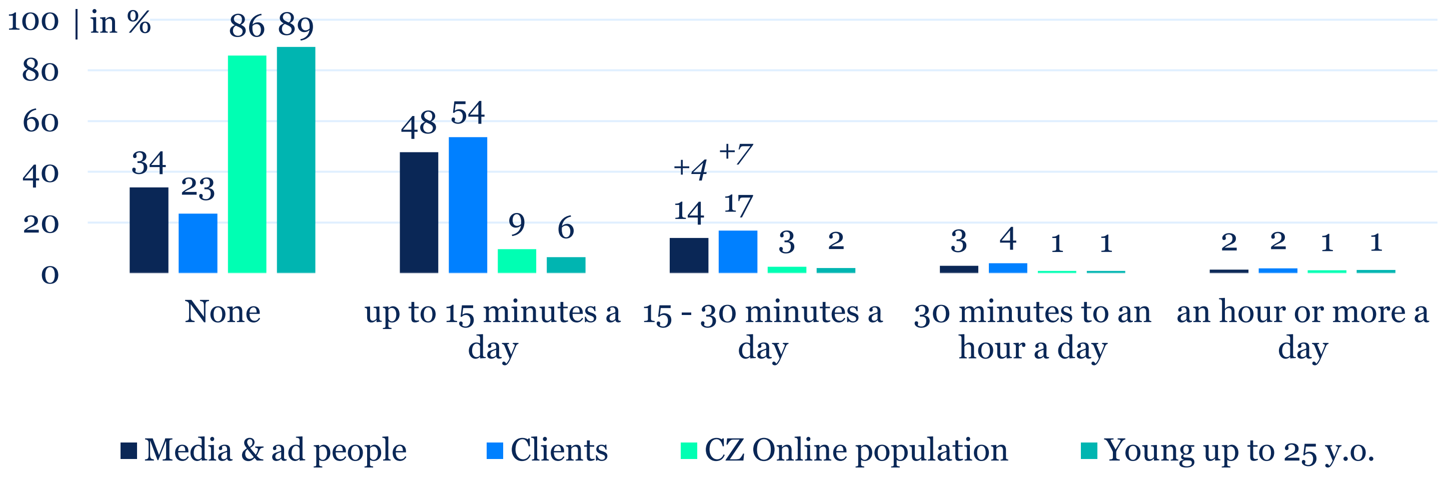


TIME SPENT DURING A TYPICAL WORKING AND WEEKEND DAY: LinkedIn

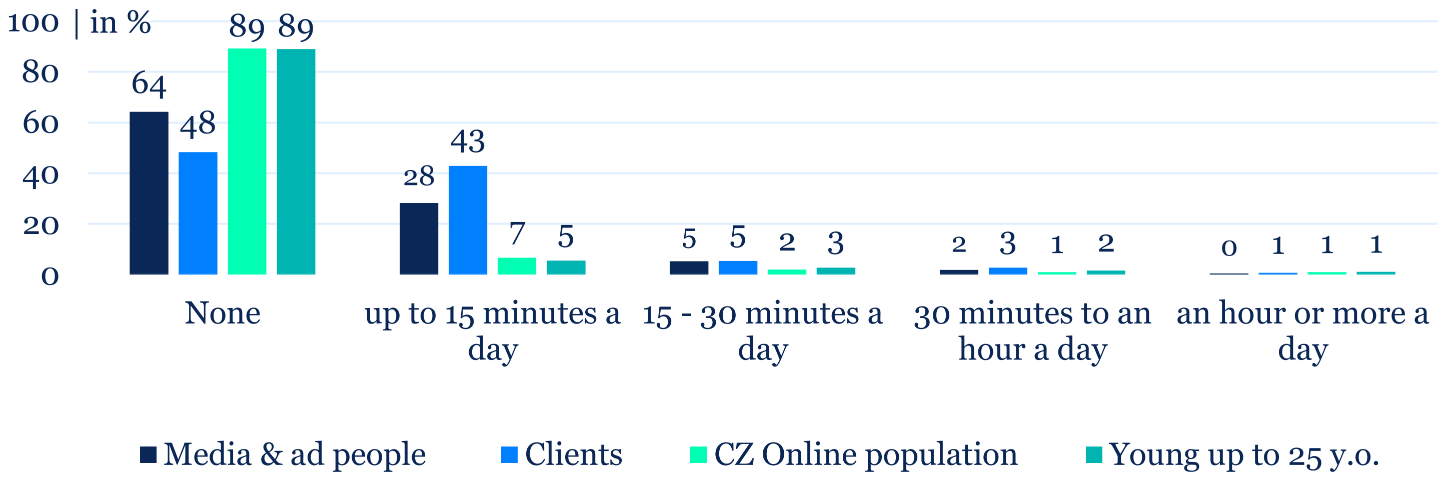
To show up on LinkedIn during a working day is almost the good manner in the field of media, advertising and marketing (more among clients).

And our love for it even increased compared to 2021.

Working day



Weekend



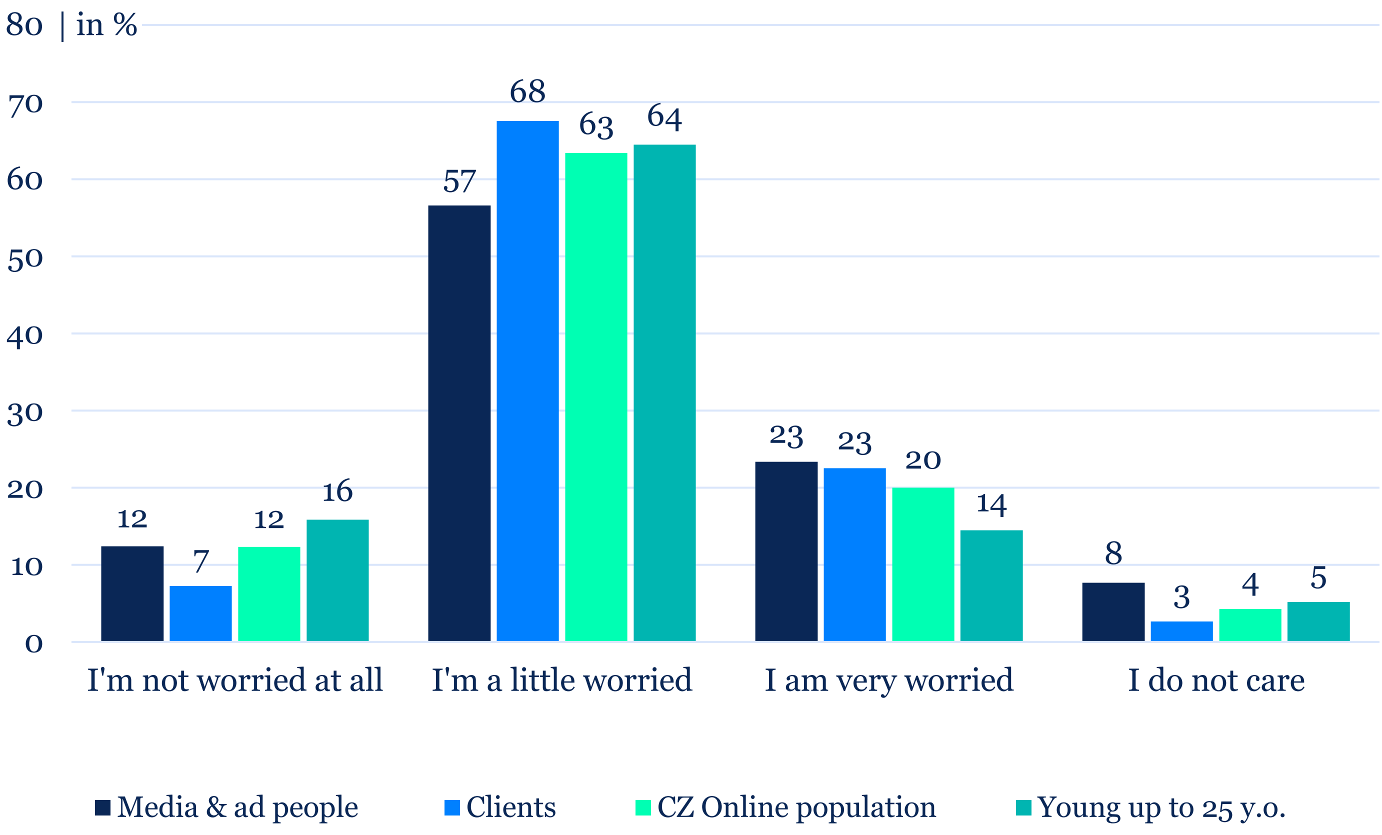
Numbers in italics above graphs = significant differences versus 2021

AND WHAT ABOUT “SOCIAL PRIVACY”?

Question:

To what extent are you concerned about possible misuse of your personal data and other information about you on social networks?

Perhaps a little unexpectedly, but this is an area where our bubble is practically no different from the general population - part of us is even a little more worried than, for example, the young.



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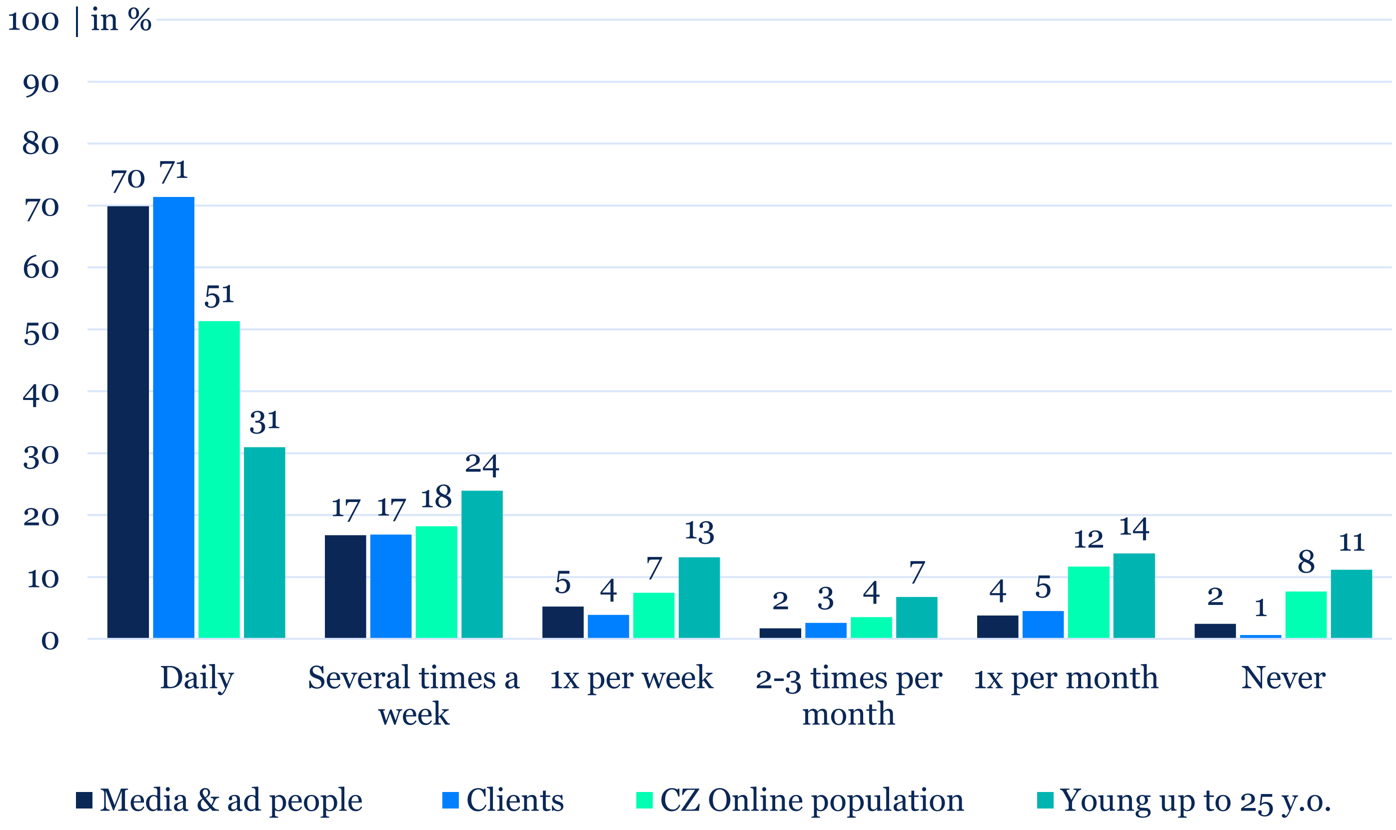
OTHER ACTIVITIES WHERE WE DIFFER

Watching, reading the news
Listening to music, podcasts

WATCHING THE NEWS AND FOLLOWING THE CURRENT AFFAIRS ON THE INTERNET

Nothing changes here, as educated Praguers, both media & ad people as well as their clients follow events very diligently - 3/4 on a daily basis, which is 20 percentage points more than in the general population.

Not to mention young people in this case.



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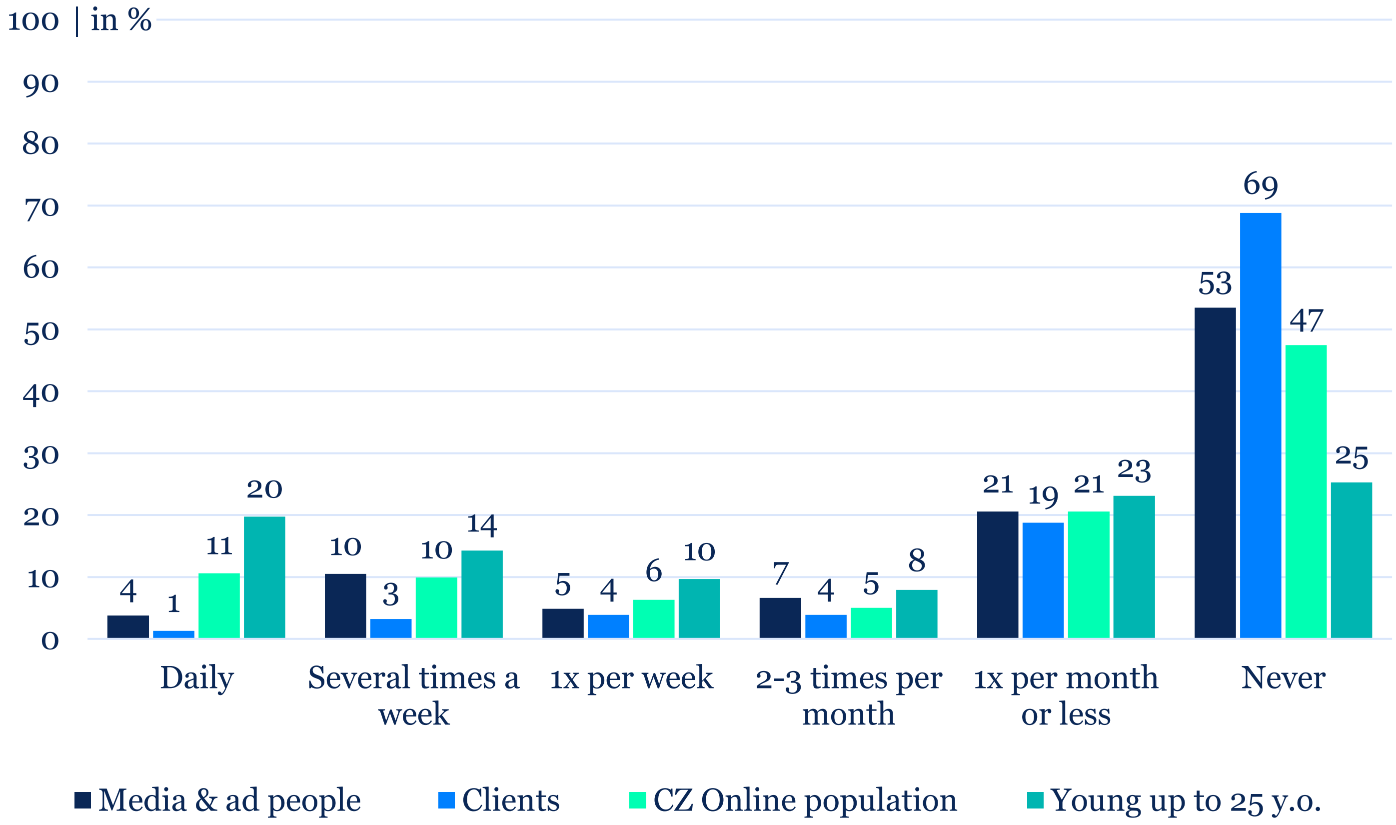
PC/CONSOLE GAMING

PC/console gaming is one area where we seem to have missed the boat again (and clients seem not to make it into the harbour).

On the other hand, a third of young people under the age of 25 play at least several times a week.



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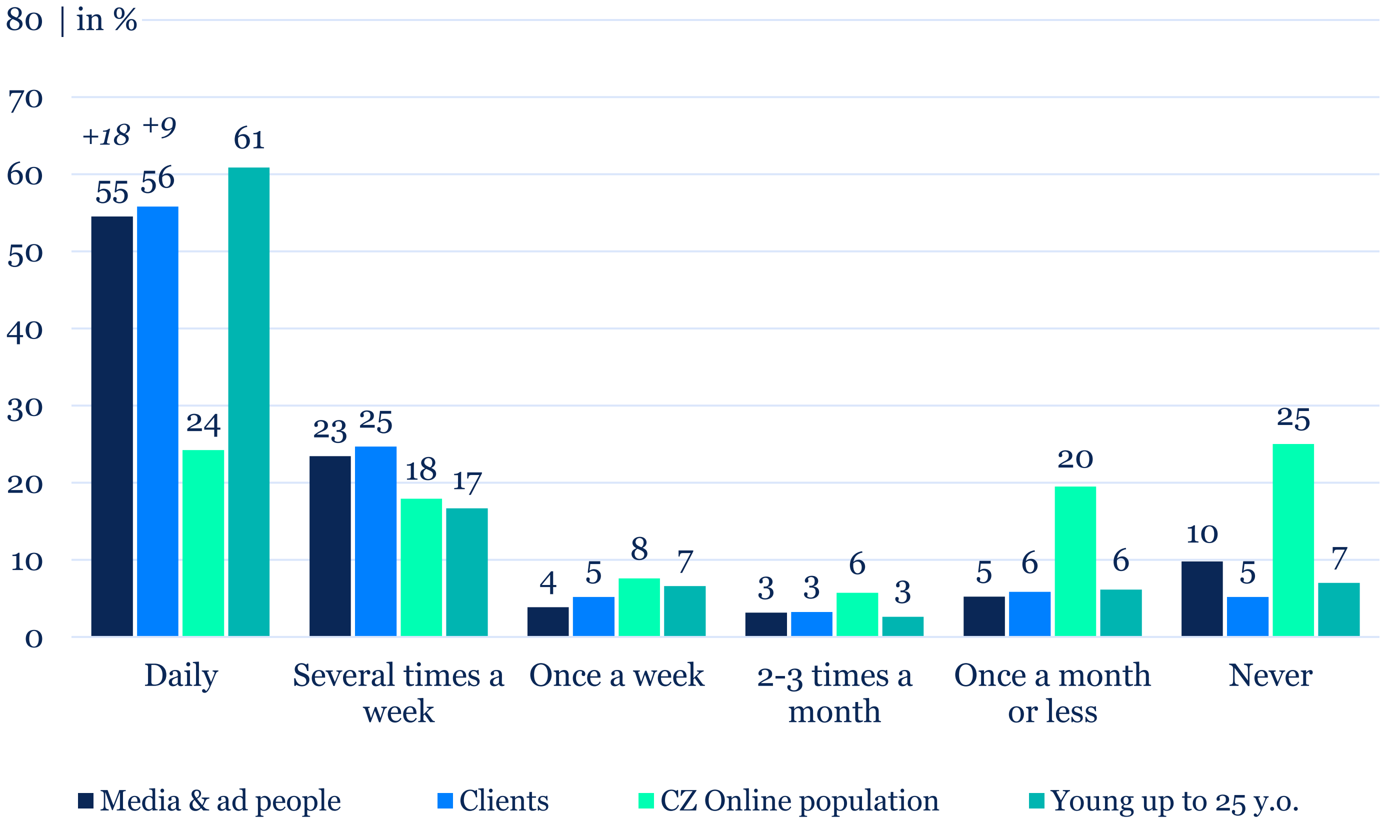
LISTENING TO THE MUSIC ON THE INTERNET OR IN MUSIC APPS (I.E. APPLE MUSIC, SPOTIFY)

Listening to music via the Internet or through applications is an area where the general population is no match for us, the media & ad people with their clients - except for the youngest generation.

77% of media & ad people and 81% of clients listen to music this way at least several times a week (working in an open space simply demands its own...).

The increase compared to 2021 has a fairly prosaic explanation - we go to offices more frequently again and nothing can beat the contemplative silence of our open spaces ....



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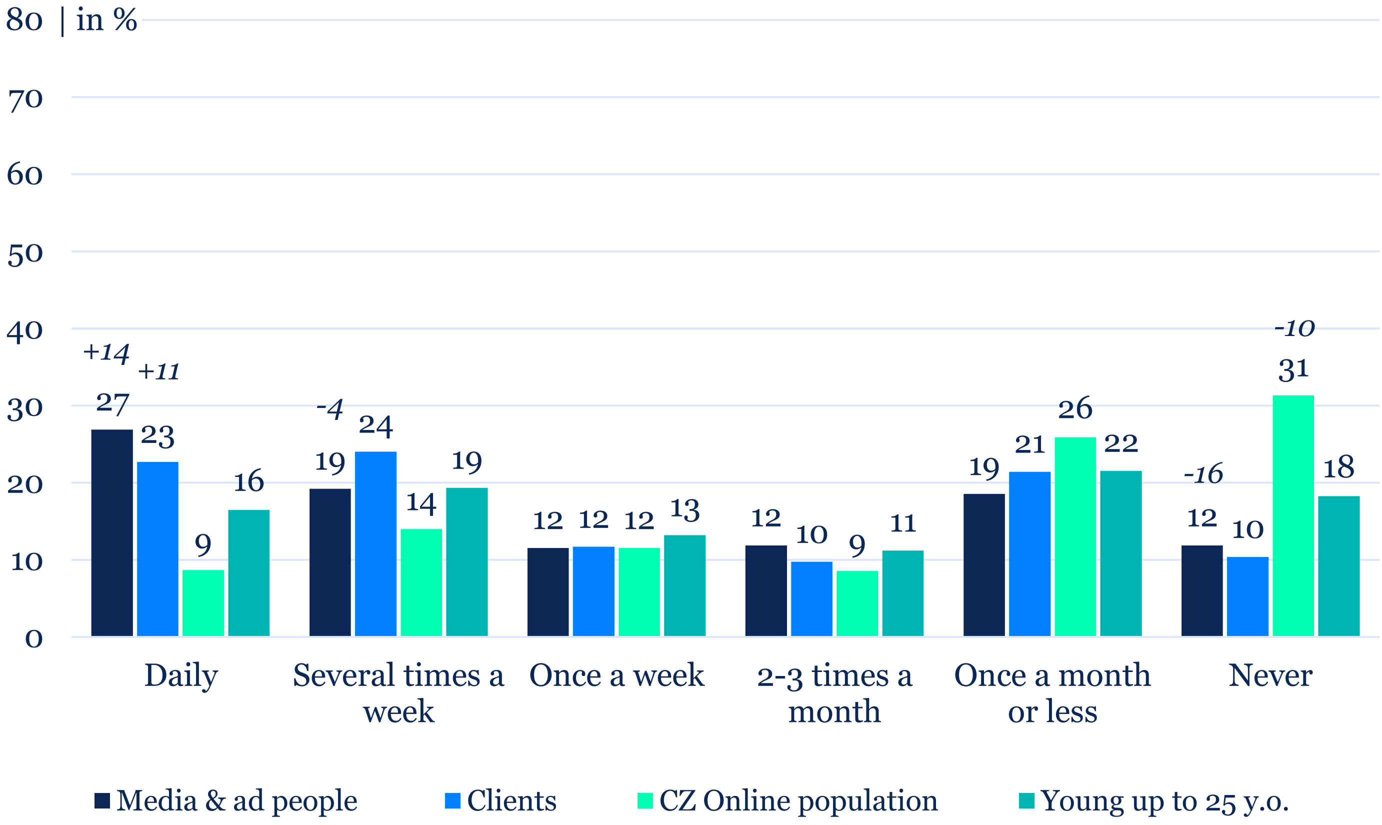
PODCAST LISTENING

Media & ad people and clients listen to podcasts significantly more intensively than the general population.

Almost half listens to them at least several times a week.

However, the popularity of podcasts is also slowly growing among the general population - 2 years ago, 41% of the population did not listen to podcasts, now it's 31%.



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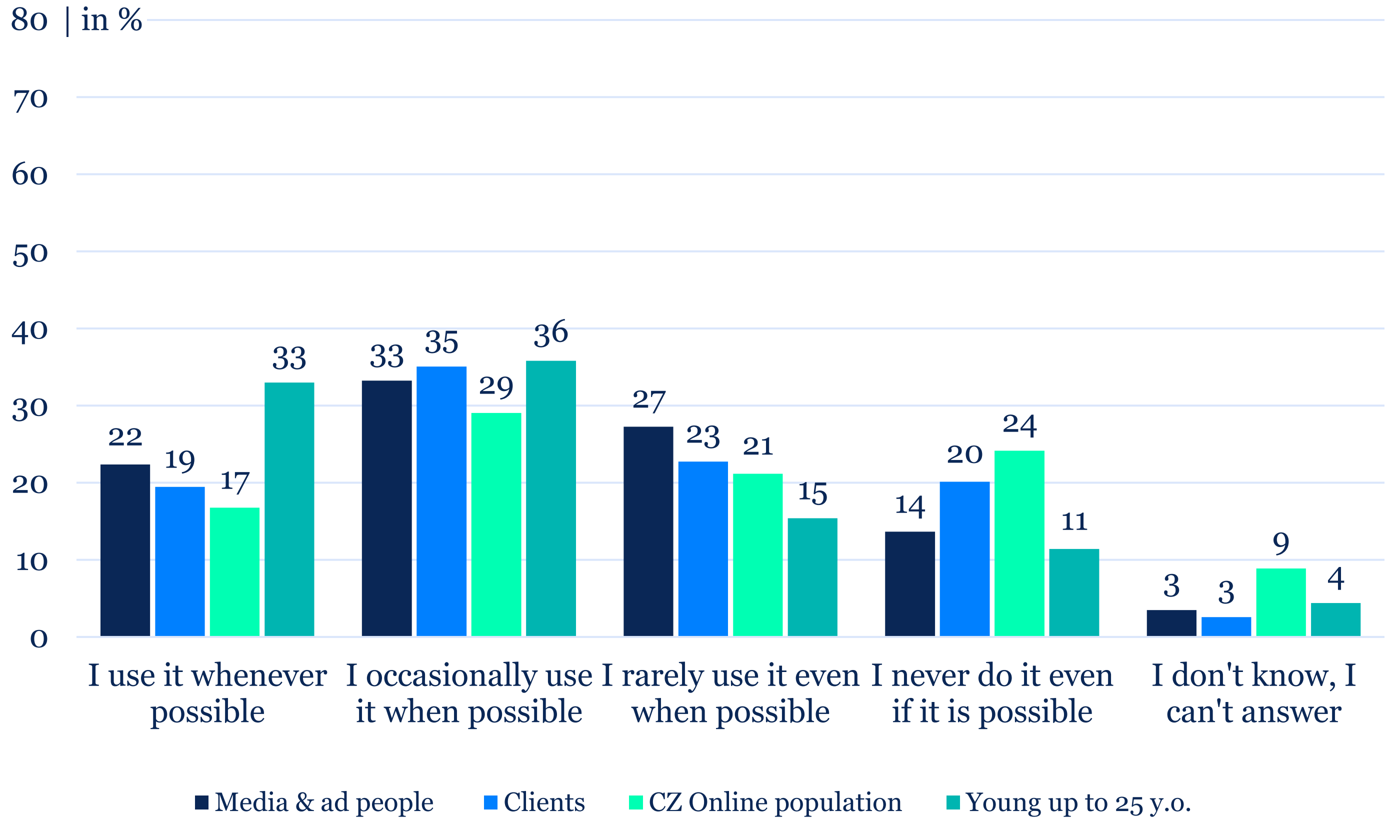
LOGGING IN TO WEBSITES USING FB / GOOGLE ACCOUNT OR APPLE ID

A fifth of media & ad people with clients use such an option whenever possible - slightly more than the general population.

But among young people, it’s a full third, and other 36% use it occasionally (just like among us).

University-educated people use such an option the least.



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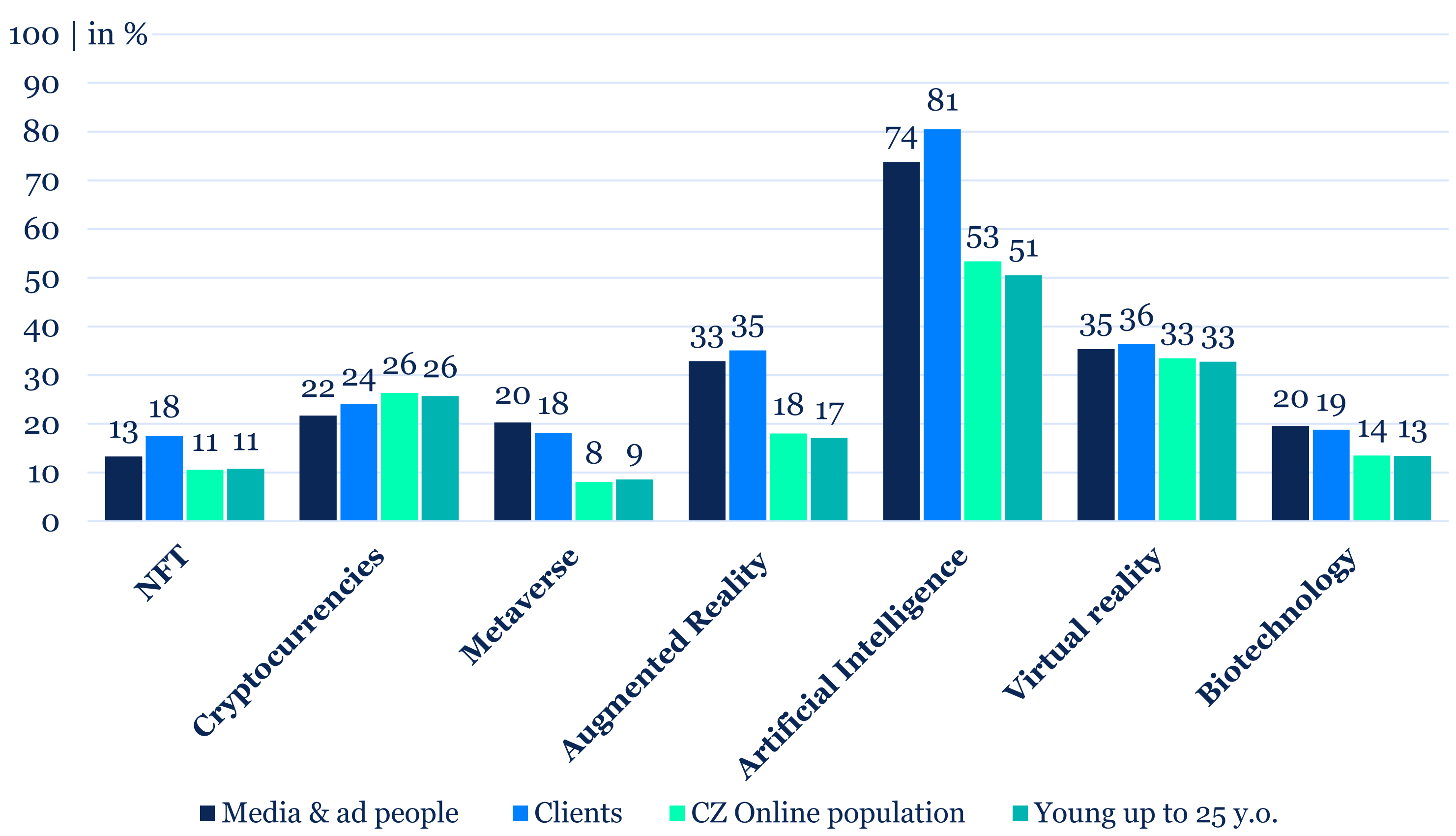
SOME BUZZWORDS

NFT, Metaverse, AI, AR?

INTEREST IN A FEW CURRENT BUZZWORDS

In case of most topics, the media & ad people with their clients are significantly more interested in them than the general population, including the youngest generation.

The biggest differences are in case of Metaverse, AR and artificial intelligence. Only cryptocurrencies and virtual reality witness the level of interest among general population as among us.



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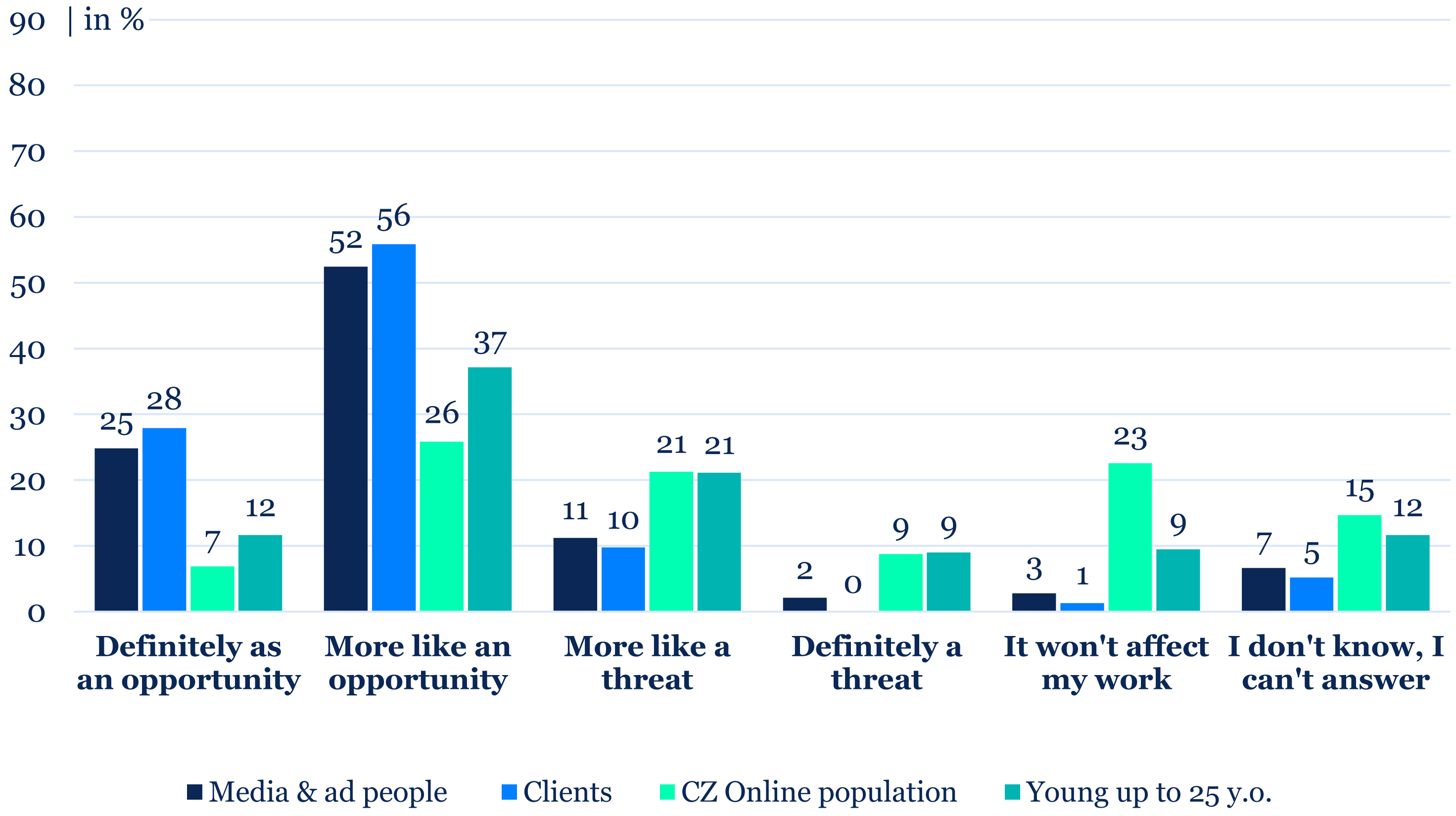
IS ARTIFICIAL INTELLIGENCE AN OPPORTUNITY OR A THREAT TO OUR WORK?

Media & ad people with their clients consider artificial intelligence primarily as a good partner – the vast majority see it as an opportunity.

The general Czech population is not that sure about this (except for young people, where almost half see artificial intelligence as an opportunity).

A quarter of the population think it will have no effect on their work. A little more often, people with university degree and people from big cities see AI as an opportunity.



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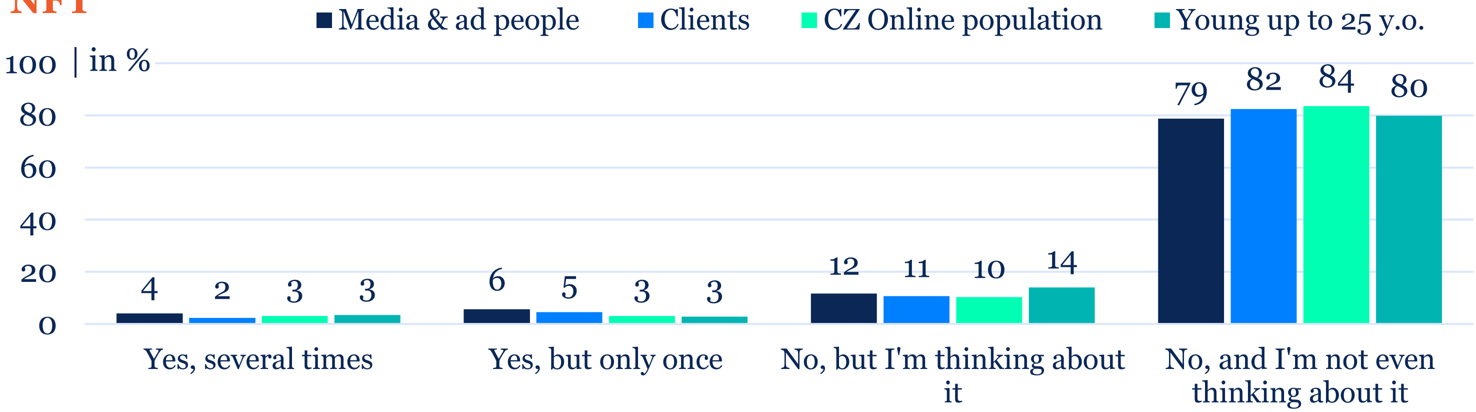
HAVE THEY EVER BOUGHT ...

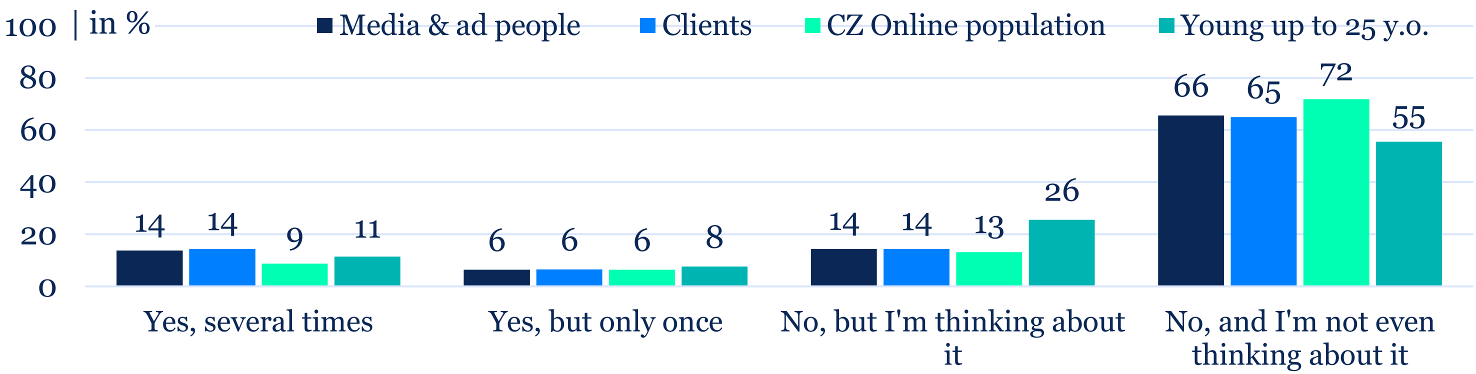
Although NFT has been a big topic of marketing in the past two years. In many strategies, the media & ad people together with clients used is exuberantly, in reality it didn’t engage us much - just like the general population.

On the contrary, we enjoy cryptocurrencies a little more than the general population, including the young. Still, young people under 25 are thinking about buying cryptocurrencies in the future the most.

NFT



Cryptocurrencies



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HOW WE SEE THE FUTURE

Will the youngsters be better off than their parents?
And how do we see the economic situation?

THIS IS A TOP SECRET SLIDE

Statement:

My standard of living has decreased over the past 2 years.

We should probably keep this slide a secret. While half of the general population say their standard of living has worsened over the past 2 years, it's barely a quarter among media& ad professionals and their clients.

Among the general population, less than 30% disagree with the statement, while among us more than half. And our clients are doing the best.

Young people complain relatively the least. The economic situation does not seem to have an effect on the support from parents, or the situation was nothing special before. Also, the inhabitants of the big cities complain relatively less often, but we are even “better off” than other residents of Prague.

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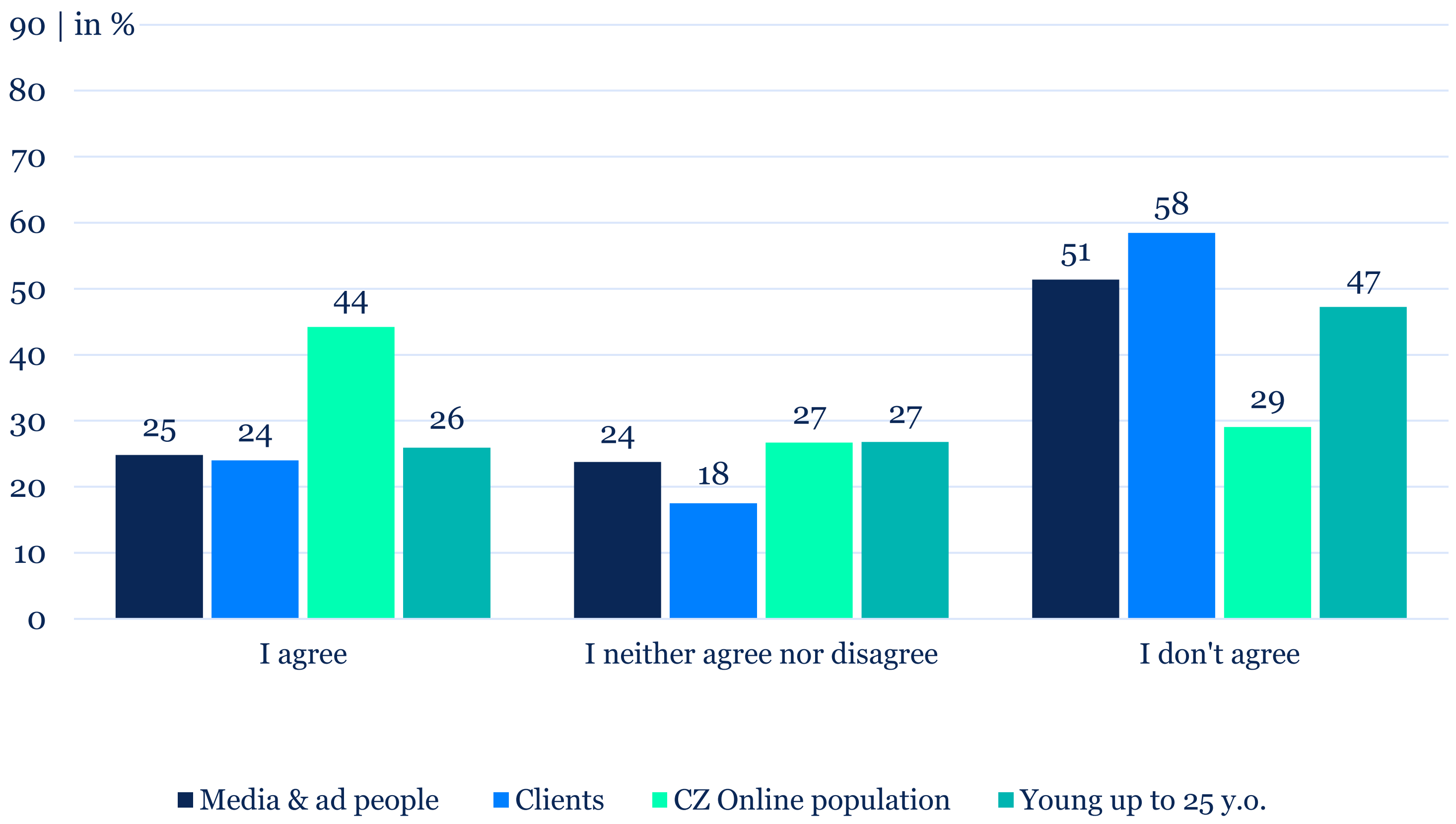
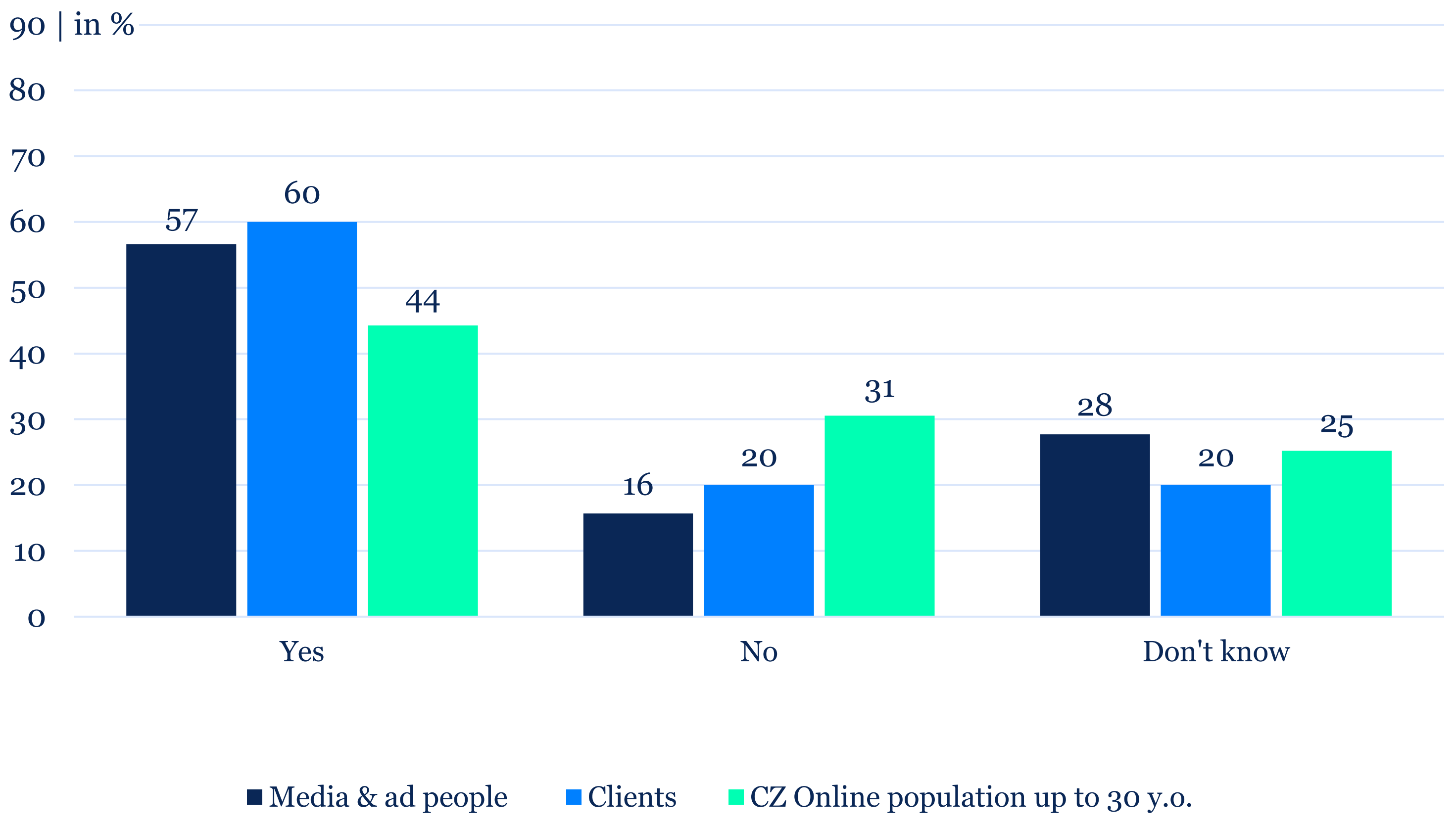


WILL THEY BE BETTER OFF THAN THEIR PARENTS? (PEOPLE UNDER 30)

Working for media and advertising agencies or their clients significantly increases optimism about the future among young people under 30.

While almost 60% of media and advertising professionals (along with their clients) think they will be better off than their parents, it is not even 45% of the general population under 30 years of age.

The most optimistic are the residents of cities with more than 100,000 inhabitants (or satellites around big cities). On the contrary, the mood in villages and small towns is not very cheerful.



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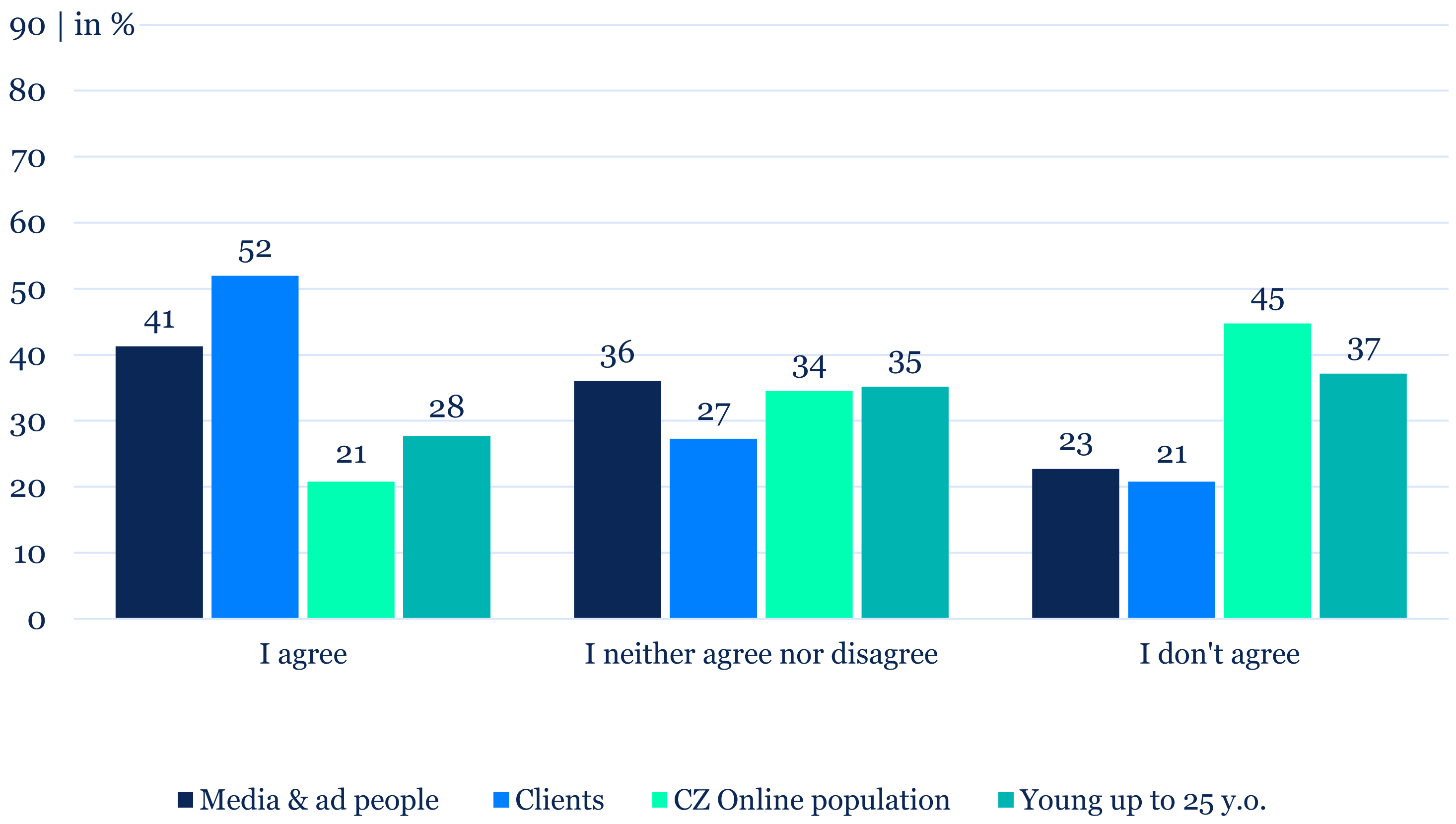
ALWAYS LOOK ON THE BRIGHT SIDE OF LIFE OR?

Statement:

In 2 years, the Czech Republic will be better off economically than it is today.

This is where we differ greatly and fundamentally from the general population. Most people are either of the opinion that in 2 years the Czech Republic will be worse off, or possibly the same as now, while we see it almost the opposite.

It is not only the influence of Prague. We are more optimistic than ordinary Prague residents. Our high education level plays a role as well (college educated people are more optimistic in general), but even here we are significantly more optimistic than “ordinary” graduates.



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BRANDS AND SOCIAL ISSUES

How do people perceive when brands focus on social issues in addition to business?
Do they perceive their importance equally?

BRANDS AND SOCIAL ISSUES

In addition to their business, brands currently focus on a wide range of social issues. This year, we therefore decided that apart from comparing our media habits, we look also at how the general population views these topics. And to be sure, we asked ourselves and our clients about these topics' importance as well.

As you will see on the following slides, we live in a very different world compared to the general population (and even the youngest part of it). We attribute significantly more importance to most topics than the general population.

The result cannot be interpreted in a way that there is no point in addressing these topics at all, but it is good to be aware of the mindset and limitations in which your target groups live. And take into account that for some topics, the population first needs to be "bought in" in a relevant way.

First, there is a segment of the population that appreciates such activities by brands, and second, when we ask people directly what areas brands could focus on, some areas don't score so badly (as you'll see below). But relevance and above all adequate context in relation to your brand and mainly product/service is important.

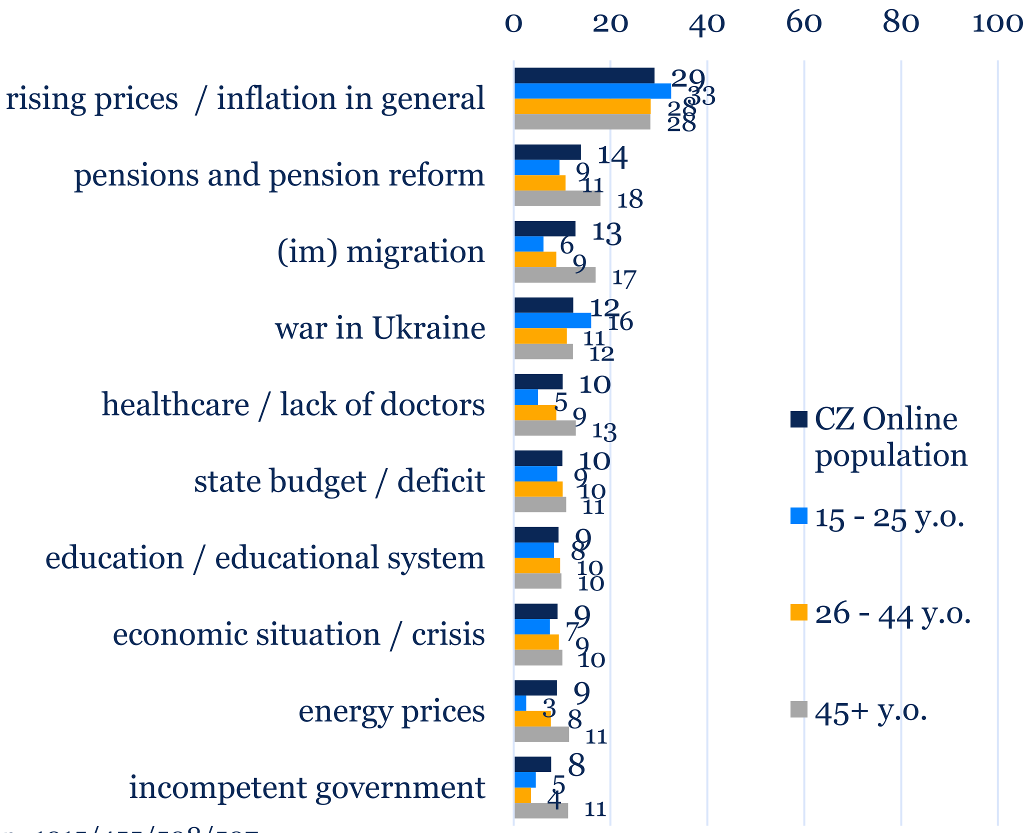
However, it is perhaps worth considering that even people who appreciate the activities of brands in social issues, in the end, cannot even think of any positive (but also negative) examples of such activities.

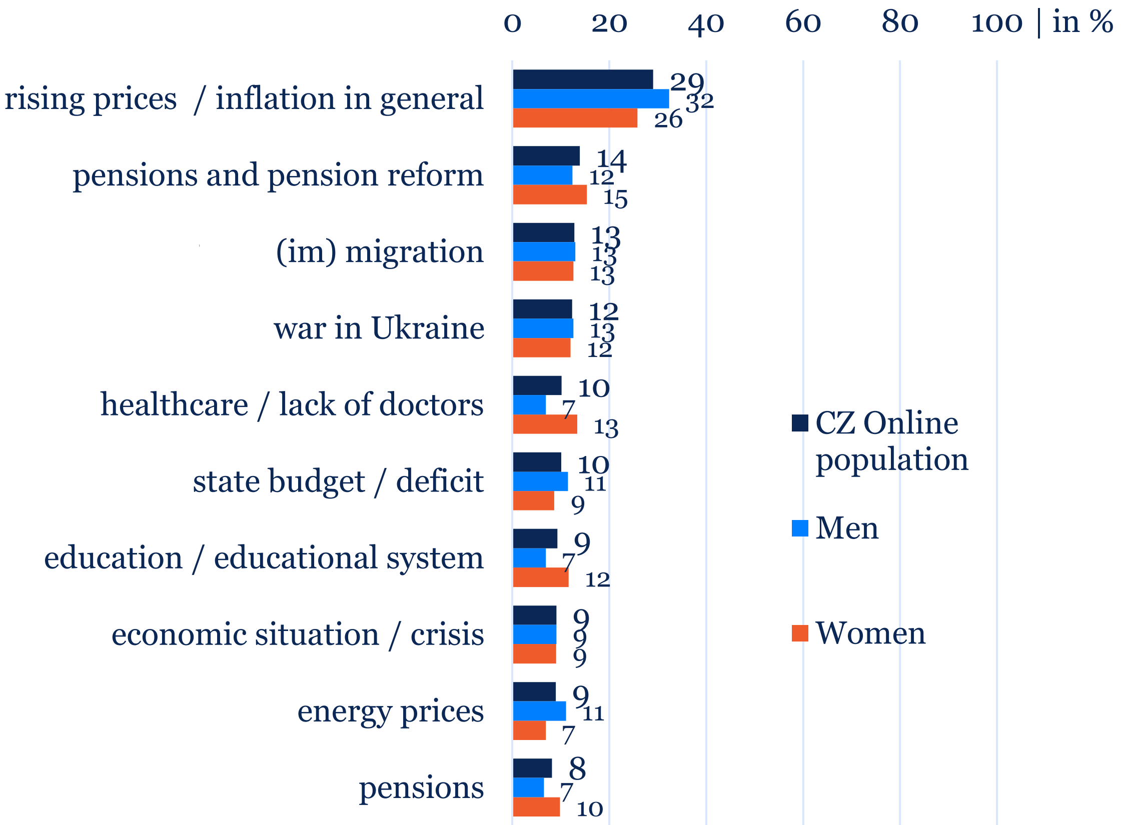
In general, various aspects of nature protection/sustainability or perhaps financial literacy emerge as the most relevant topics.

IN THE CZECH REPUBLIC TODAY, THE ATTENTION SHOULD BE PAID TO

SPONTANEOUSLY, TOP 10

The main issues that concern the Czechs are inflation, pensions, migration and the war in Ukraine. There are no major differences among the subgroups (young people still mentioned nature protection or housing inaccessibility more often - both with 8%).





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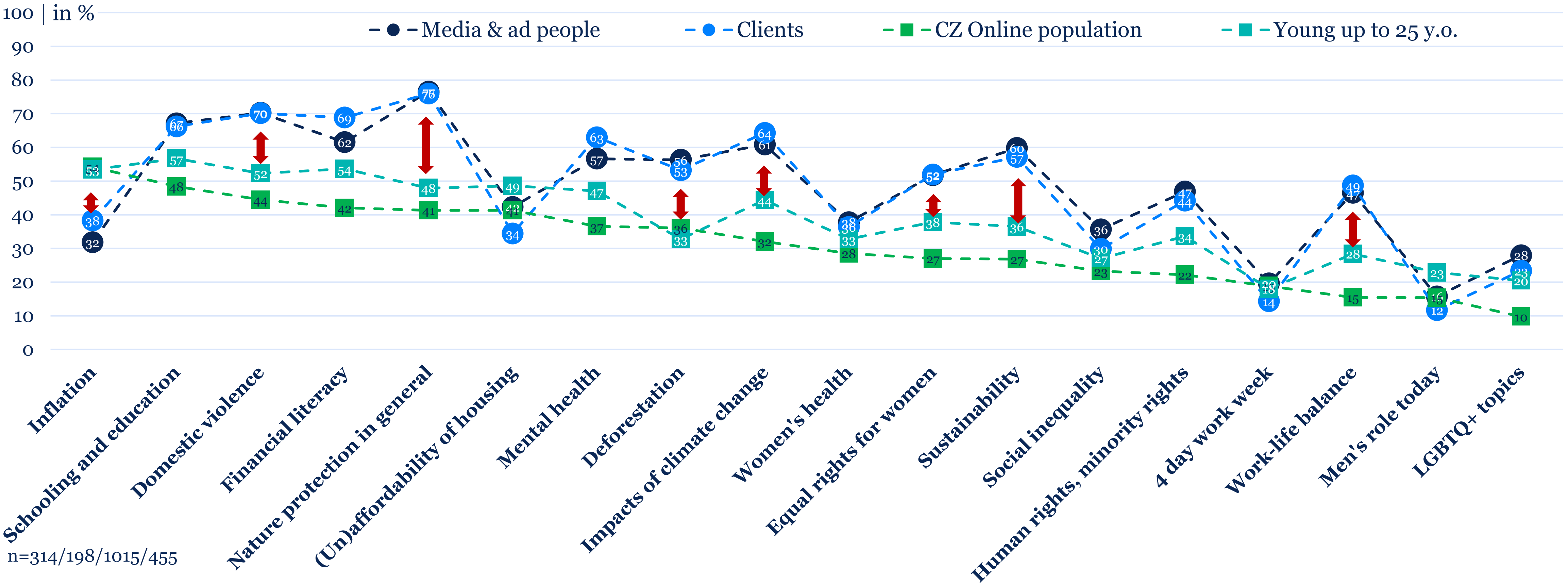
We somewhat anticipated that the social topics that the population would mention would not be exactly the ones we would be interested in (the ones brands are concerned with).
So, we prepared a list of topics that we then gave to people to evaluate (including ourselves).

THE IMPORTANCE OF SOCIAL ISSUES

HOW MANY % CONSIDER THE TOPIC IMPORTANT, SORTED BY POPULATION

Media & ad people are more or less in line with clients, but we are very far from the general population, including young people under 25. If you think that this is a matter of education, then maybe you had better not look at the next slide.



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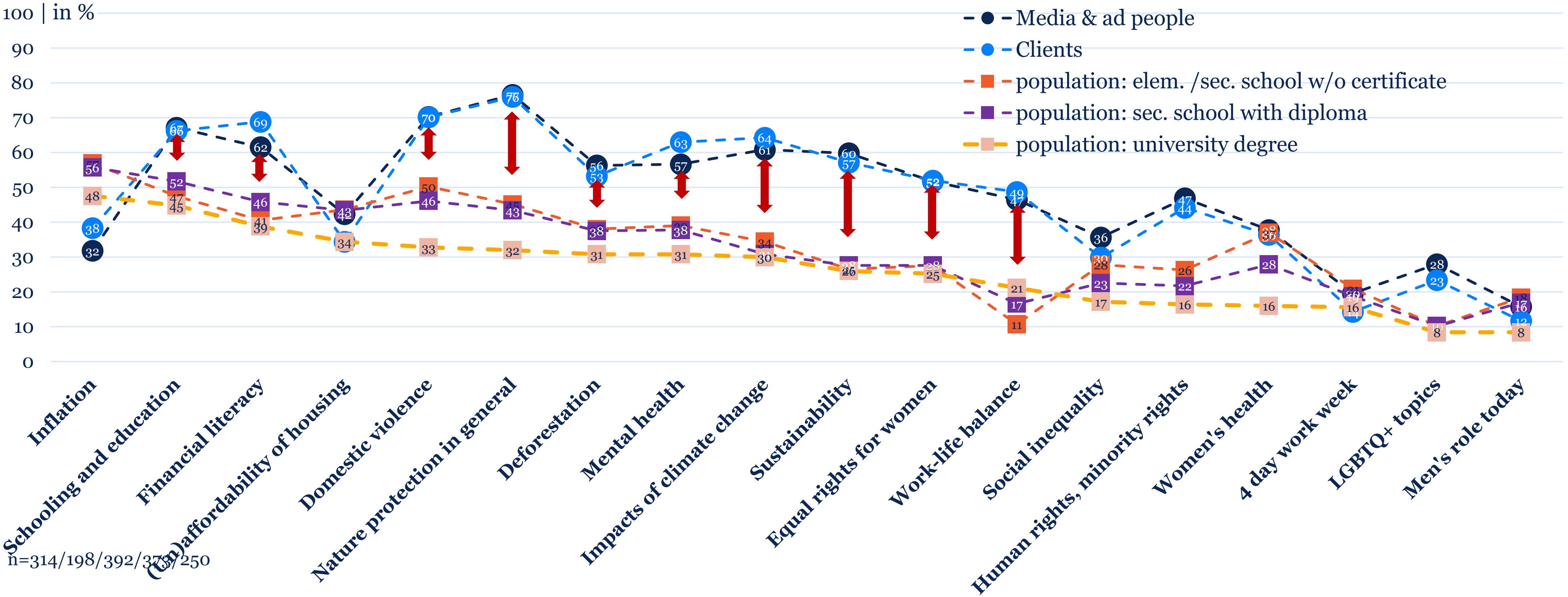
THE IMPORTANCE OF SOCIAL ISSUES

EDUCATION SPLIT, RANKED BY COLLEGE EDUCATED

Yes, you can see correctly, with increasing education, the perceived importance of social issues in the population slightly decreases (the sample is representative, so it's not like there are only old white men among those with university degree).



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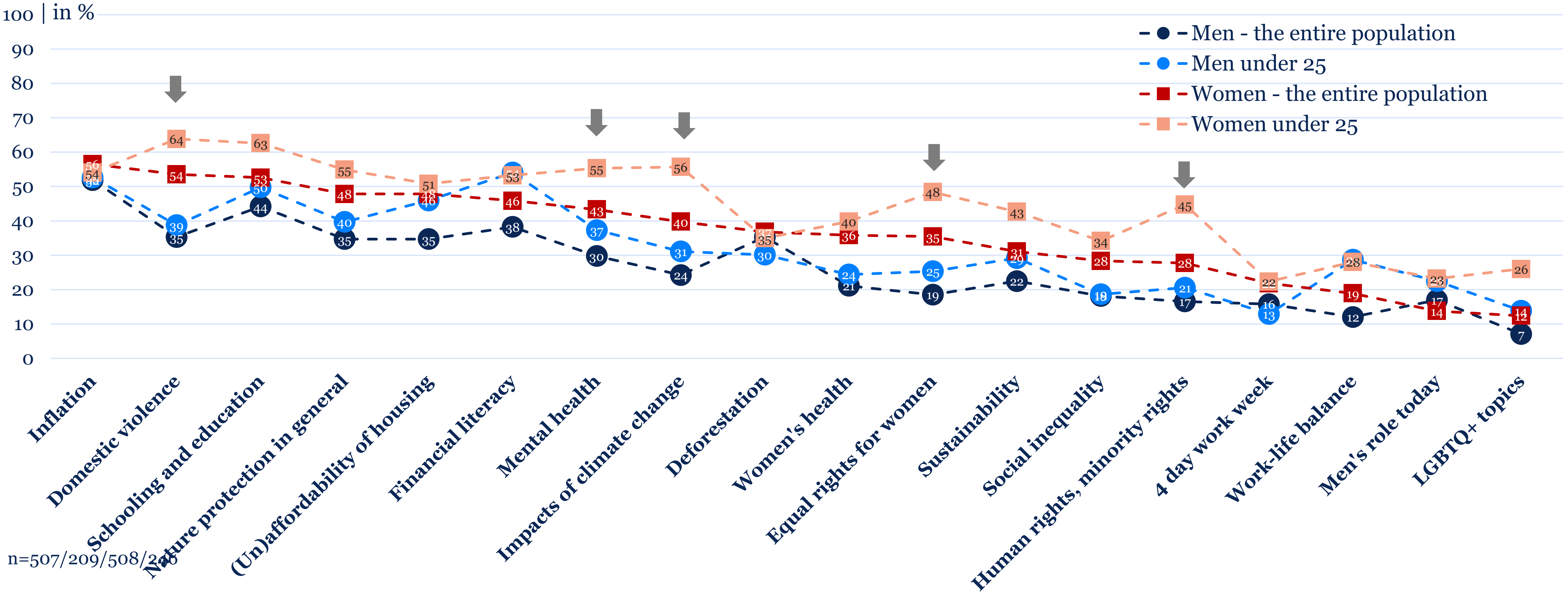
THE IMPORTANCE OF SOCIAL ISSUES, MEN VS. WOMEN

GENERAL POPULATION, RANKED BY WOMEN

If brands want to address social issues, they should use young women as a springboard.



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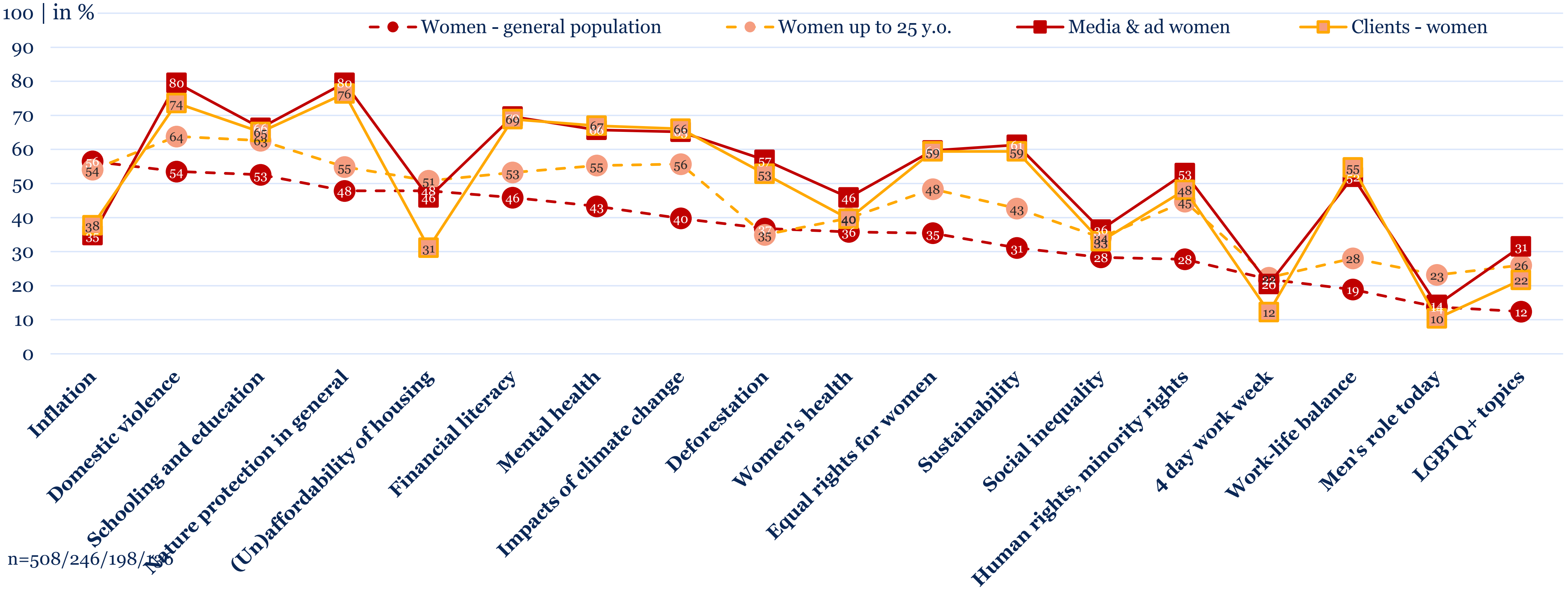
THE IMPORTANCE OF SOCIAL ISSUES, WOMEN COMPARISON

RANKED BY WOMEN – GENERAL POPULATION

Although women in general form the pillar of various social issues, even the youngest ones do not match the vigor of women working for media & ad agencies or for their clients.



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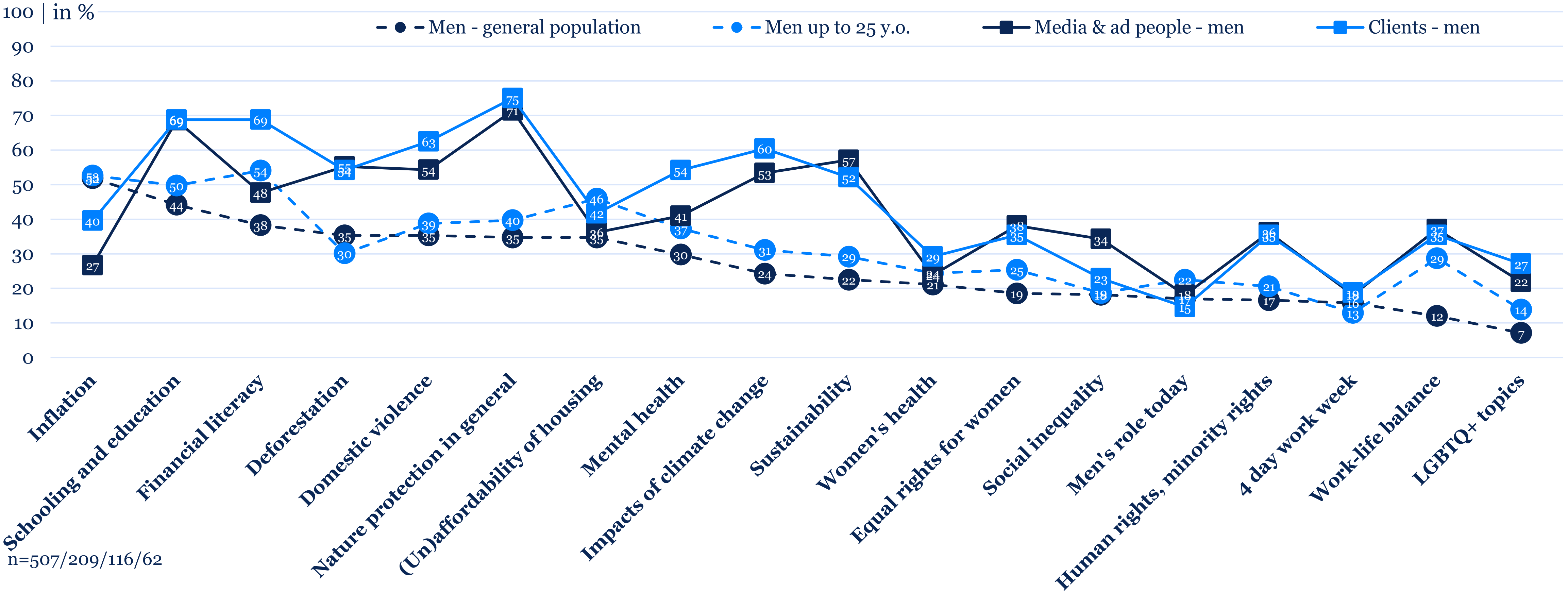
THE IMPORTANCE OF SOCIAL ISSUES, MEN COMPARISON

RANKED BY MEN – GENERAL POPULATION

The differences are even greater between men from the general population and men from our bubble. And this applies even when comparing only young men under 25 from general population and our bubble.



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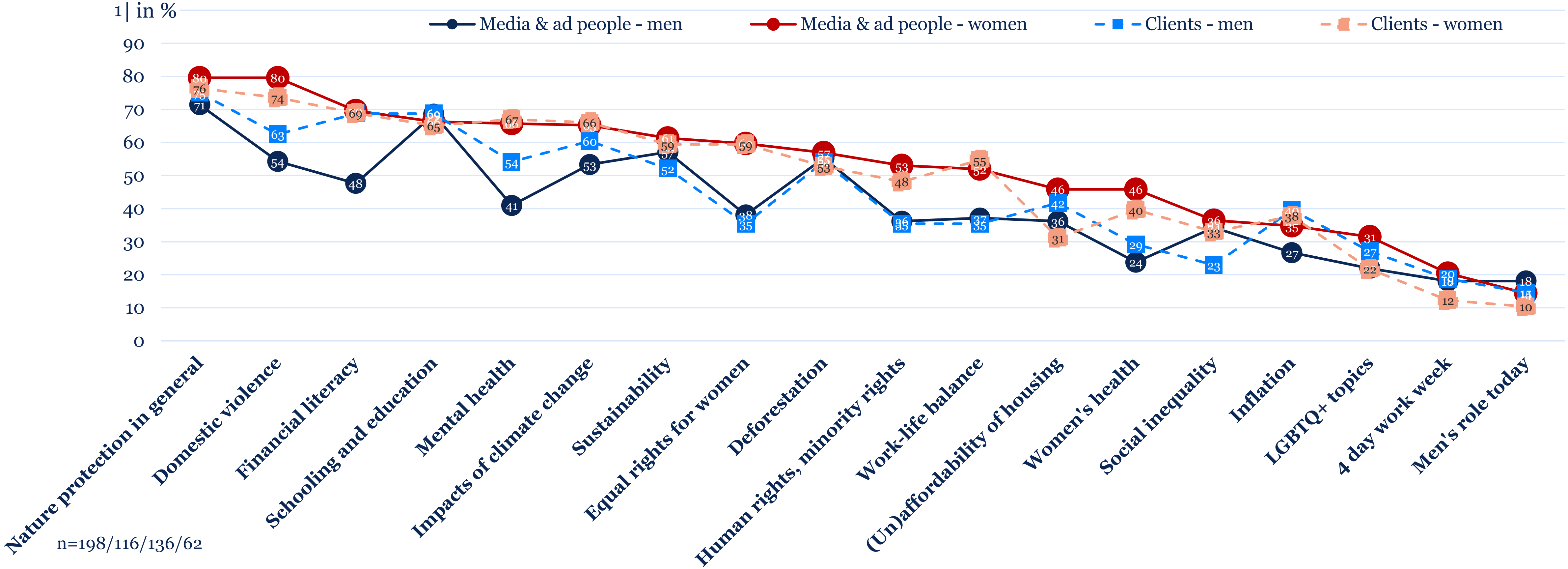
THE IMPORTANCE OF SOCIAL ISSUES, MEN VS. WOMEN

MEDIA & AD PEOPLE VS. OUR CLIENTS

While women working in media & ad agencies and for clients are quite similar in their attitudes, male clients are a bit more activistic than media & ad men.



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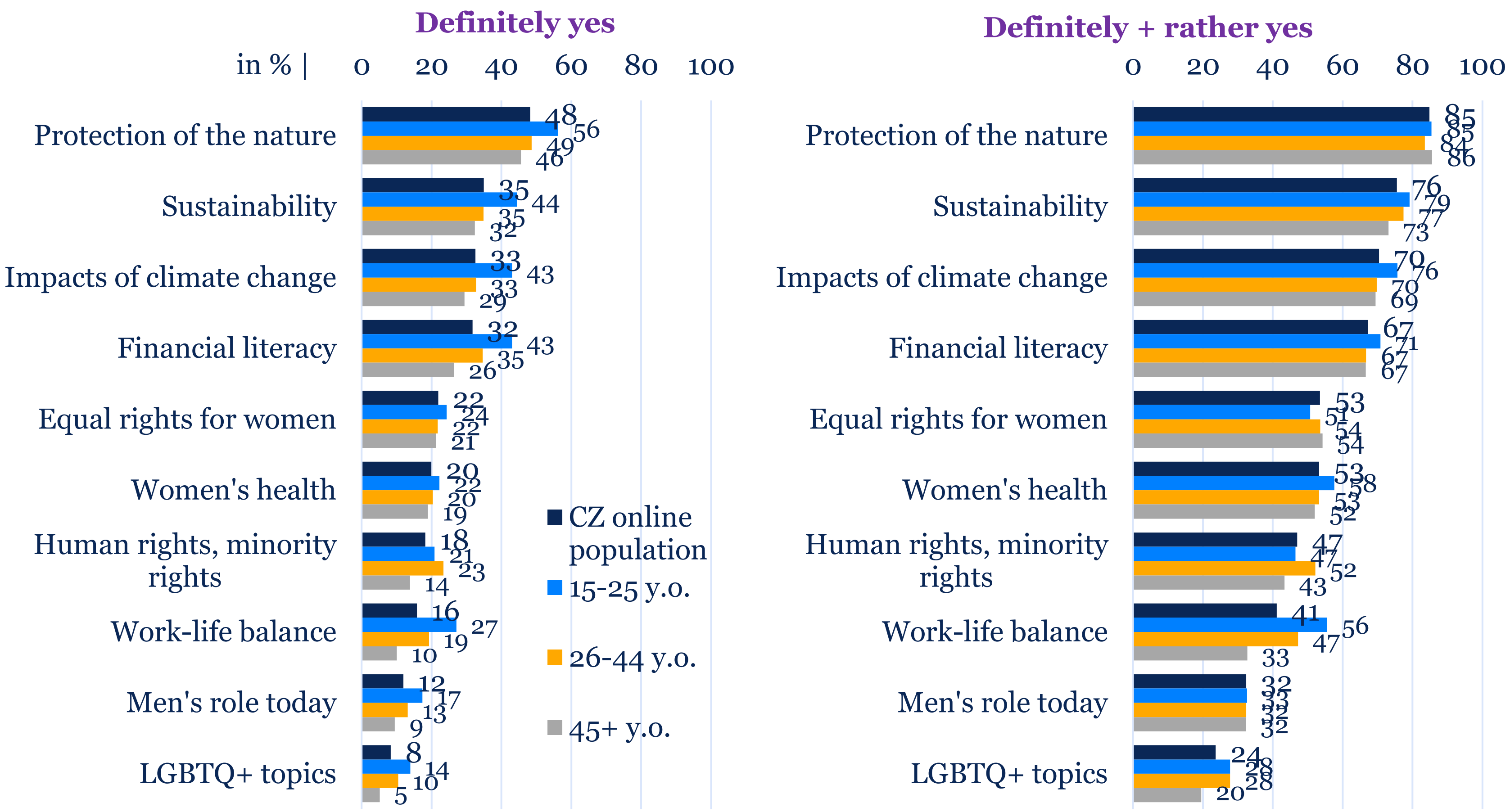
WHAT BRANDS SHOULD FOCUS ON

GENERAL POPULATION

And now a bit of a contradiction.

If you ask people a little differently: *"When brands/companies decide to focus on social issues, what do you think it should be?"*, you will find that brands can focus on basically anything (well in reality, mainly nature related topics).



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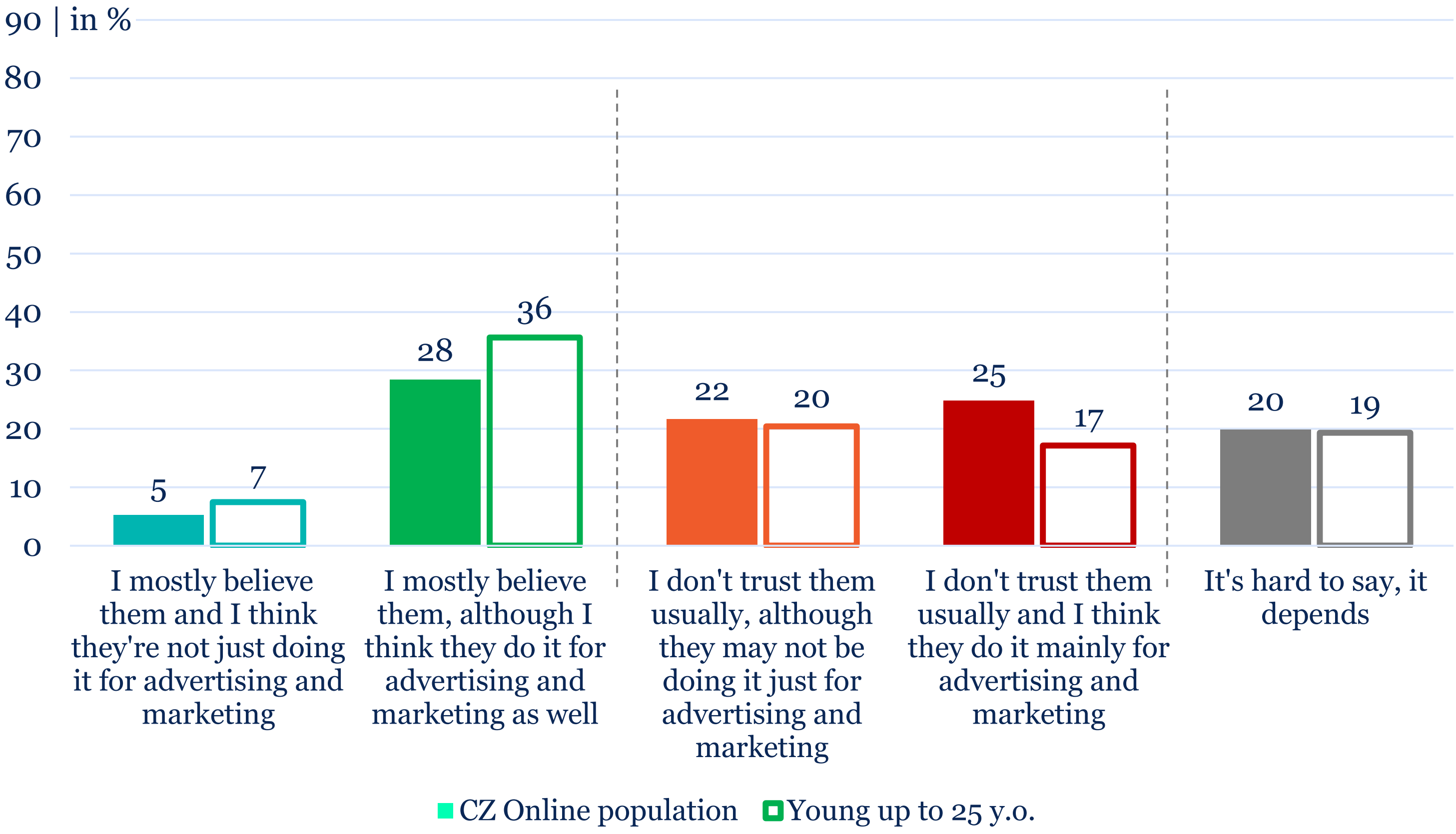
AND HOW CZECHS PERCEIVE WHEN BRANDS "DO GOOD"

Question:

To what extent do you trust brands to be sincere when they address social issues outside of their core business?

Brands can dedicate their effort to various topics, but only a small part of people will be convinced of their sincerity. Just 5% of the Czech population (and 7% of young people under the age of 25) believe that brands are dedicated to social issues completely selflessly and that they mean it sincerely. A third believes them but consider it to be a part of marketing.

Brands are trusted (albeit with reservations) mainly by those who personally attach great importance to various topics. That's why age doesn't matter too much - see the next slide.



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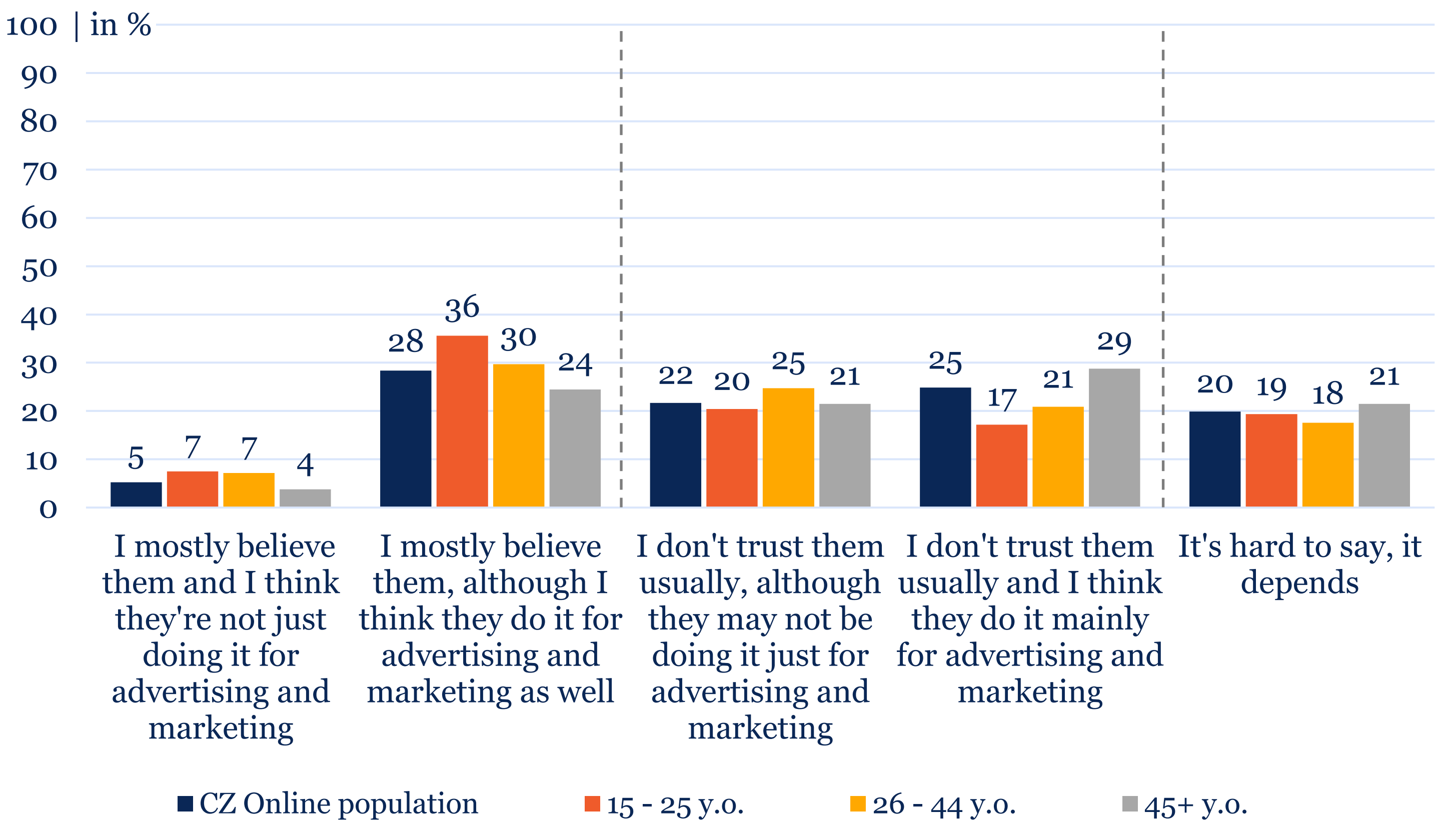
WHEN IT COMES TO TRUST TO BRAND ACTIVITIES, AGE DOES NOT DIFFERENTIATE MUCH

Question:

To what extent do you trust brands to be sincere when they address social issues outside of their core business?

Although young people trust brands a little more, they perceive it mainly as part of marketing.



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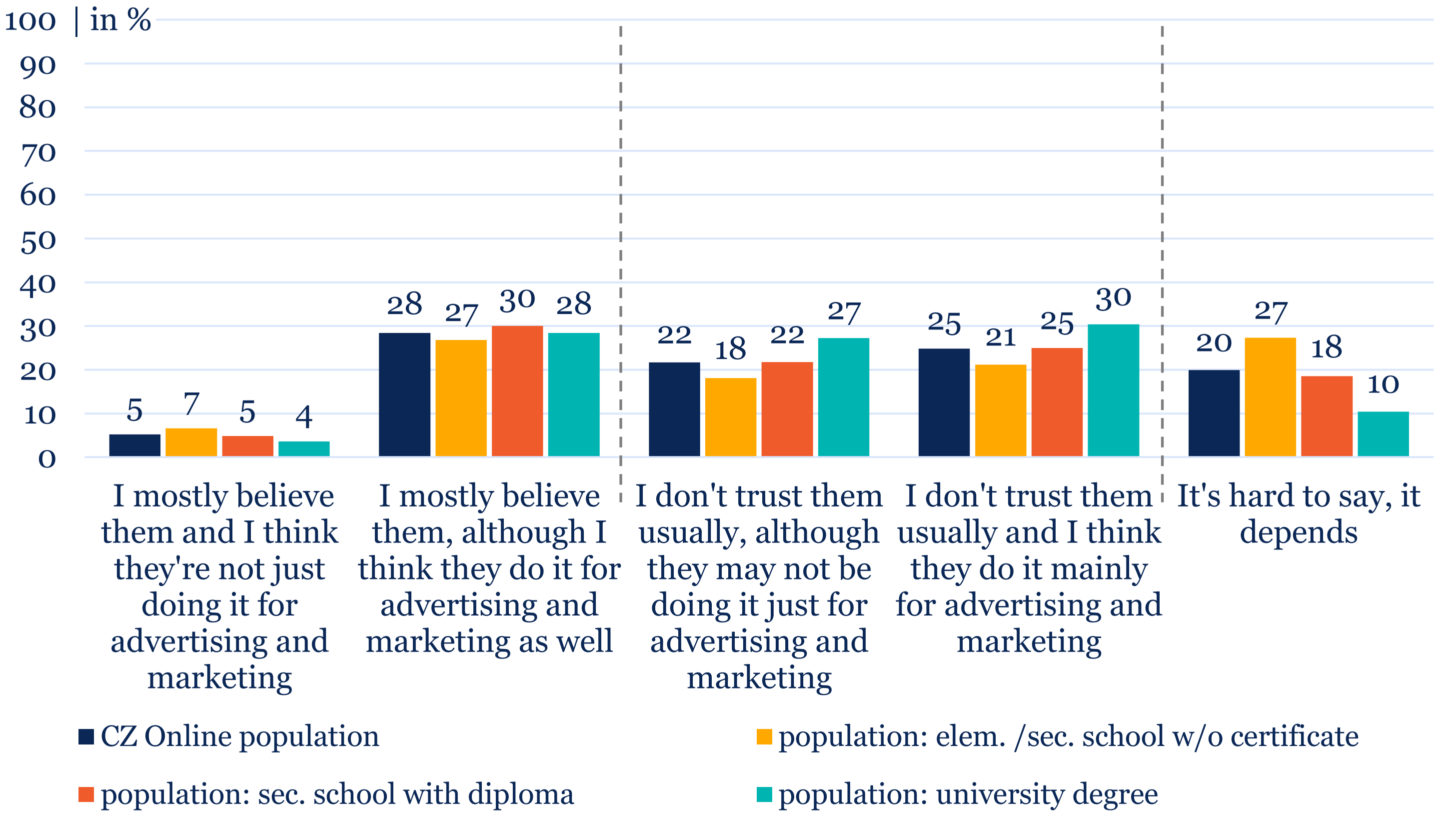
AND COLLEGE EDUCATED PEOPLE ARE THE MOST SKEPTICAL OF SUCH ACTIVITIES

Question:

To what extent do you trust brands to be sincere when they address social issues outside of their core business?

It is mainly university-educated people who do not trust brands very much - and they have a very clear opinion about it.

Besides, the inhabitants of big cities are also mostly sceptical.



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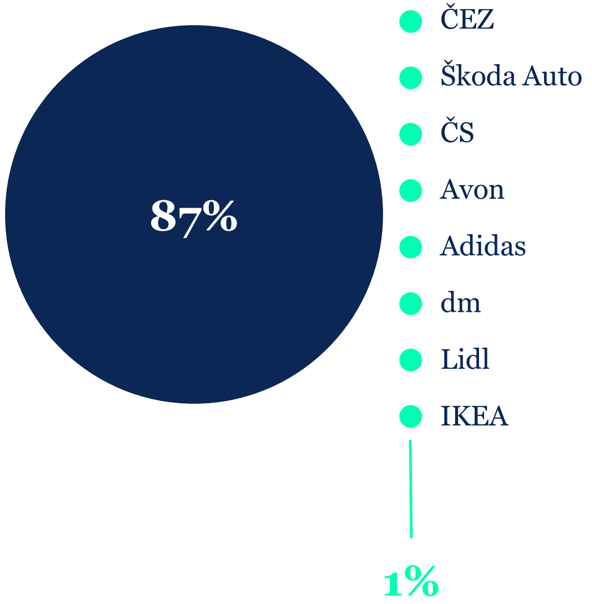
AND WHICH BRANDS DEAL WITH SOCIAL ISSUES WELL/POORLY? IT IS REALLY HARD TO SAY...

When we ask people which brands do it well and which ones don't, even the most enthusiastic about these topics basically can't think of any.

Honor to the exceptions.

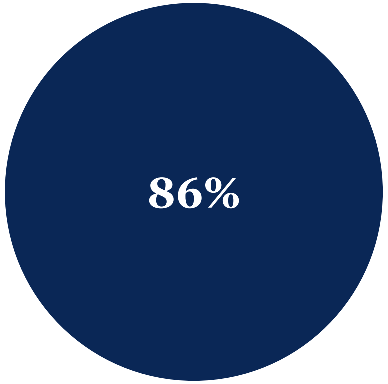
What brands do it well?

I do not know/none



What brands do it wrong (completely untrustworthy)?

I don't know



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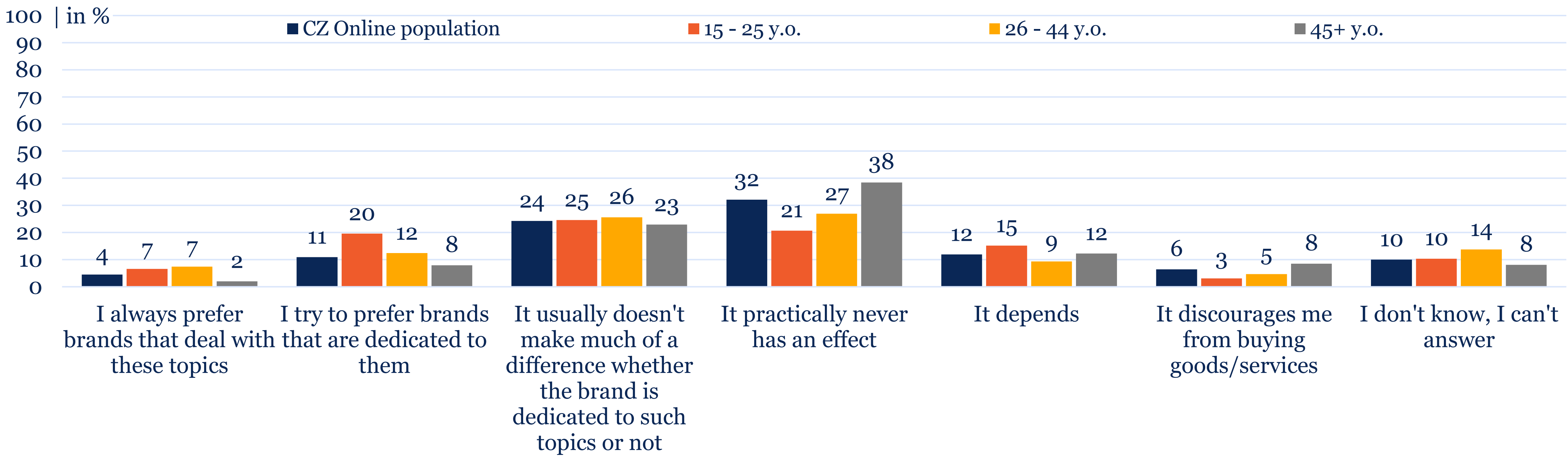
AND HOW DOES ALL THIS AFFECT CONSUMER PREFERENCES?

Question: **When you choose goods/services, to what extent does the fact that brands/companies also address some of the social issues influence your final choice?**

5% of the population say they would prefer brands that deal with social issues for sure. A third say it has no effect at all.



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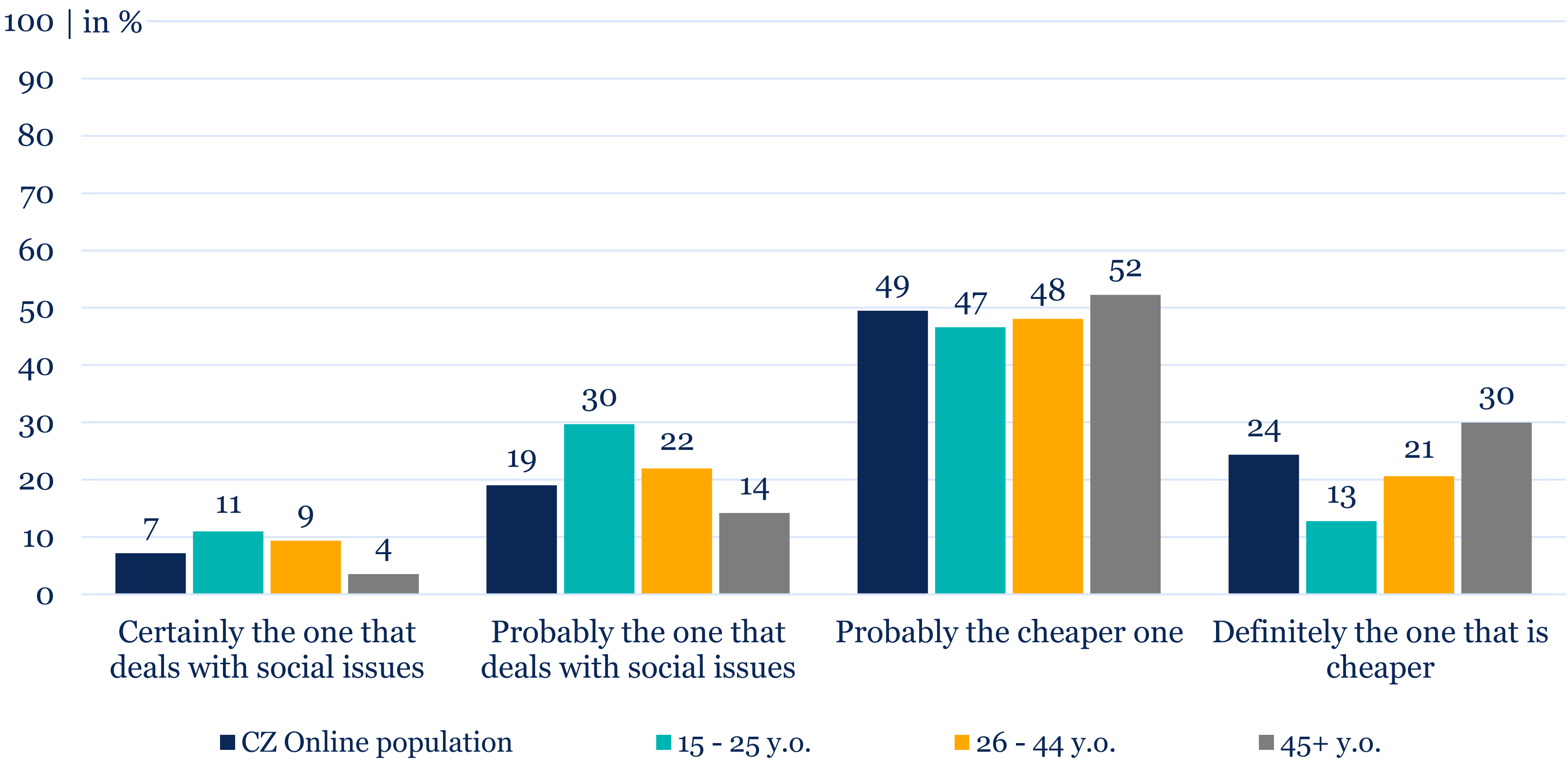
CAN BRANDS CHARGE A PREMIUM PRICE WHEN DOING GOOD?

Question:

When you have 2 brands/companies that offer the same thing, but one deals with different social issues but has higher prices, while the other doesn't deal with any social issues but is cheaper (by 10% or more), which one will you prefer?

A quarter of people would handle a 10% price difference in favour of the more responsible brand - for young people it's a 40% difference.



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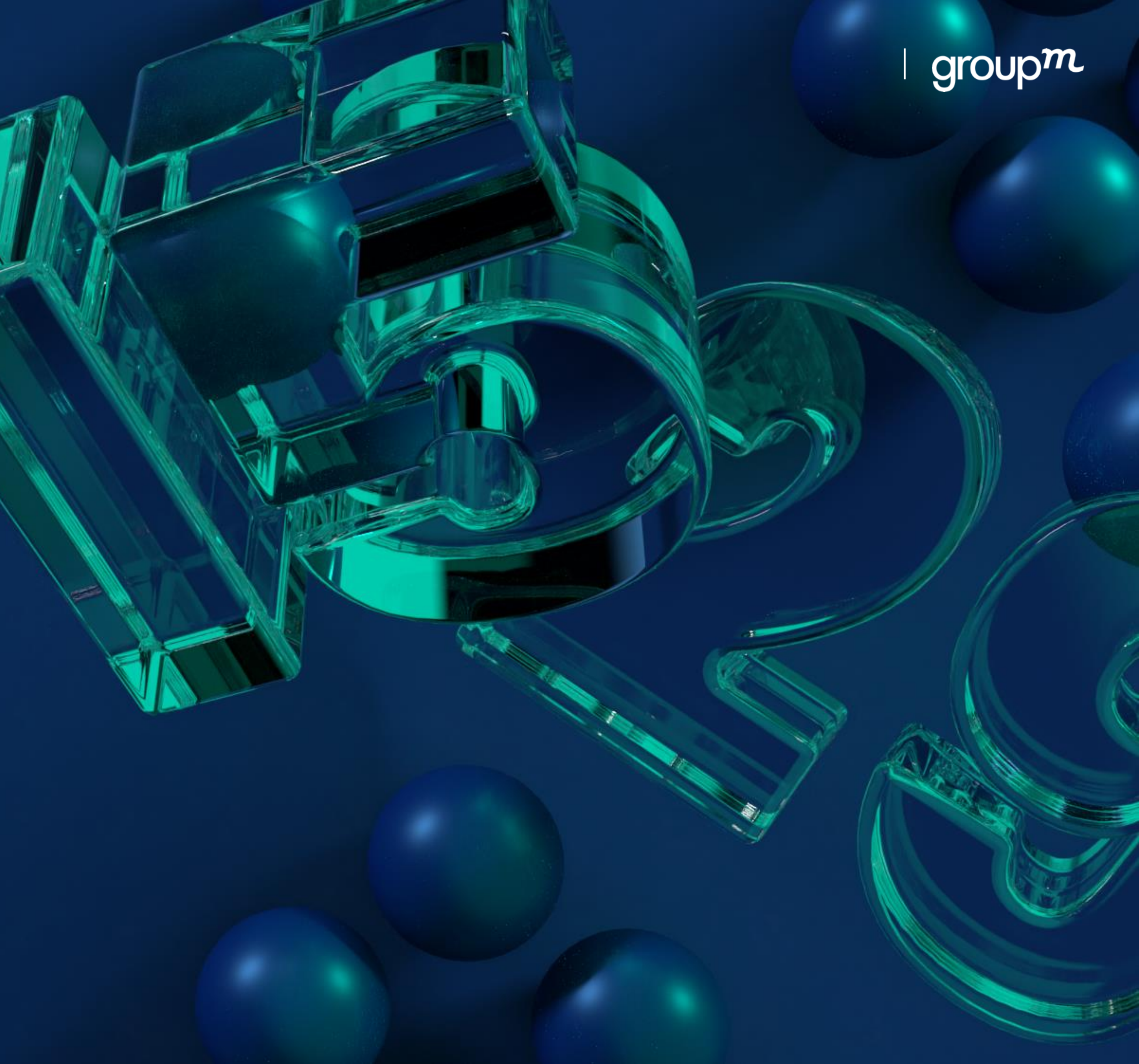
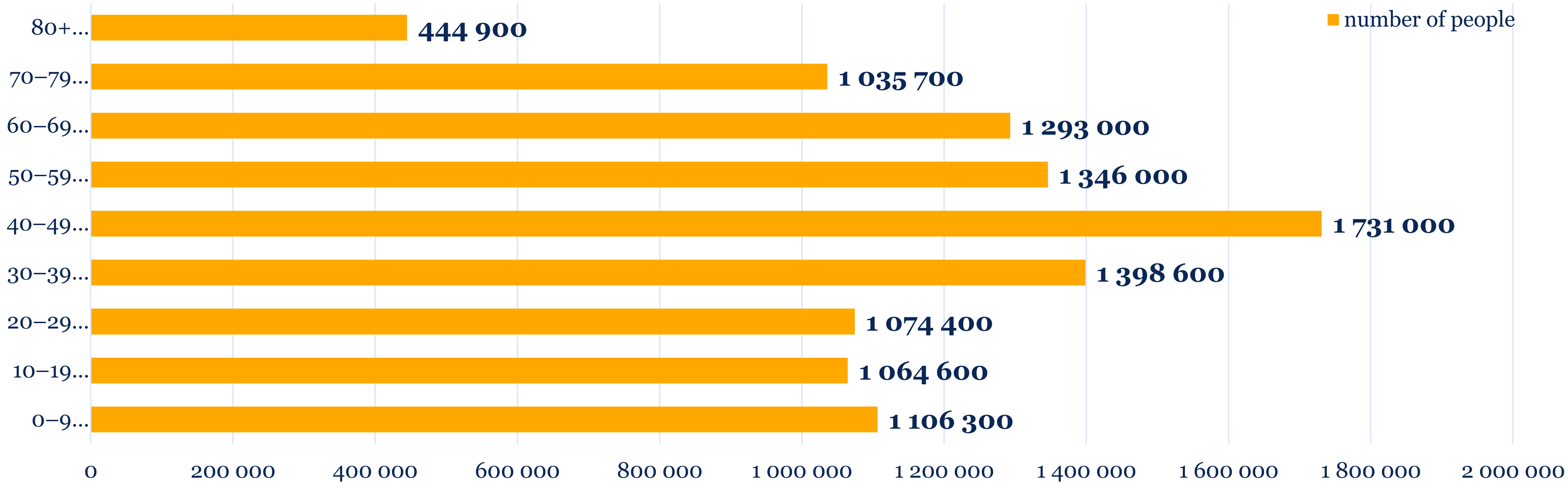
ETERNAL YOUTH BUBBLE

Just to remind you ☺



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

As you can see from the absolute numbers of the size of individual age groups in the Czech population (source CZSO, 2021), young people are a of limited supply in the Czech Republic. Average age is 43/median 44.



Source: ČSÚ

HAPPY TO ANSWER YOUR QUESTIONS

Petr Tomáš

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GROUPM
NOVEMBER 2023