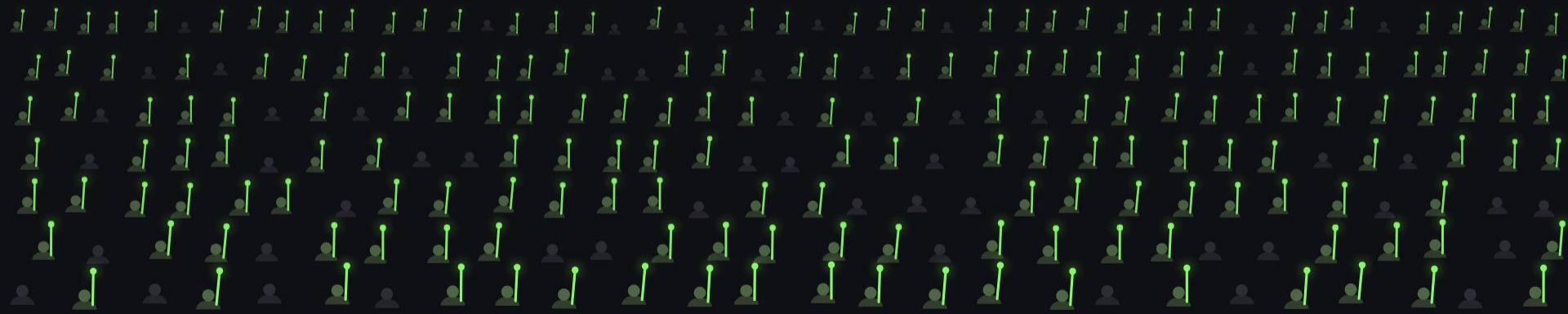
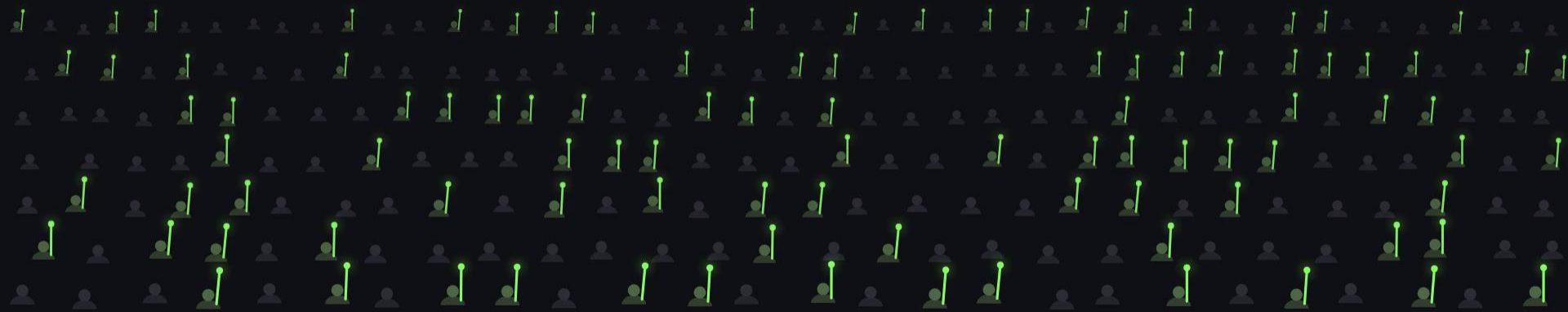
✋ HANDS UP IF

You've bought something in the last month because someone on your phone told you to.



KEEP IT UP IF

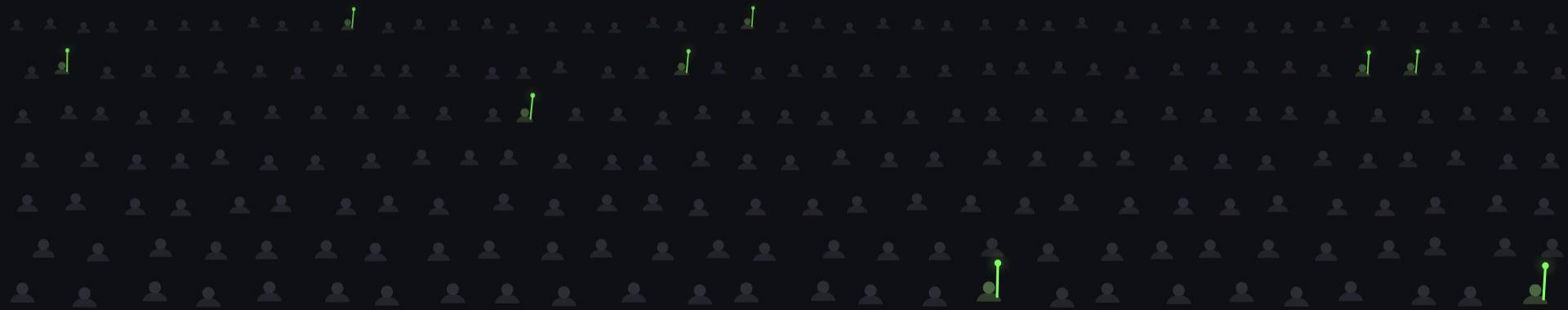
That someone was a creator or a stranger in your feed, not a brand's ad.



KEEP IT UP IF

You found it on a publisher's website.

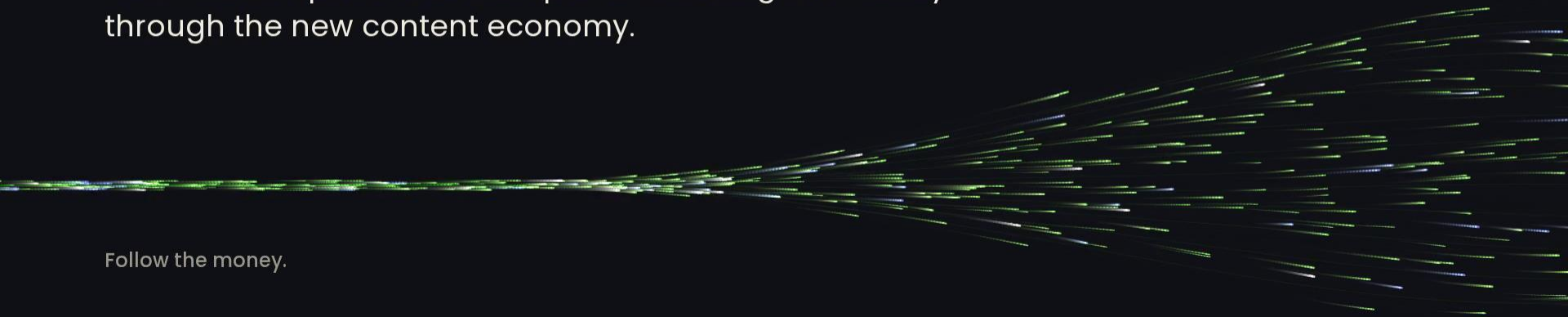
Look around.



AOP · ECONOMICS OF SOCIAL MEDIA

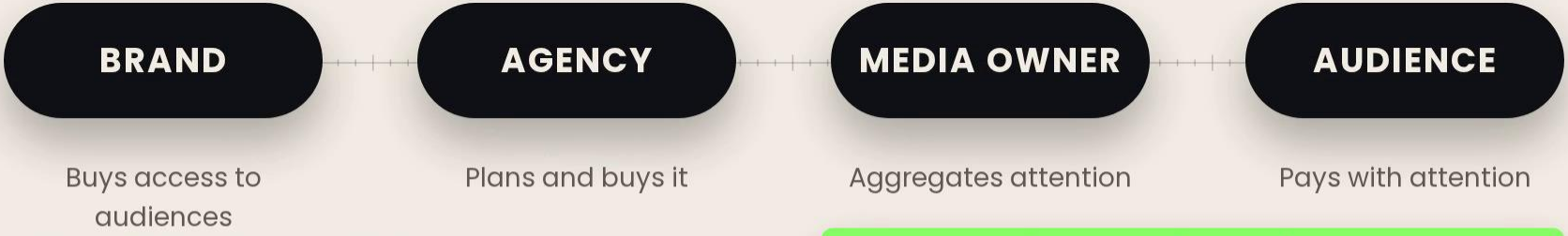
THE ECONOMICS OF SOCIAL MEDIA ARE CHANGING.

From media spend to social spend. Following the money through the new content economy.



Follow the money.

It used to be a straight line.



Advertising funded the system.

Everyone knew where the money went.

02 / THEN ATTENTION FRAGMENTED

The audience didn't disappear.

It became distributed.

And the economics followed.

2× YouTube viewing on UK TV sets, 2022 to 2025. From 9 to 19 minutes a day.



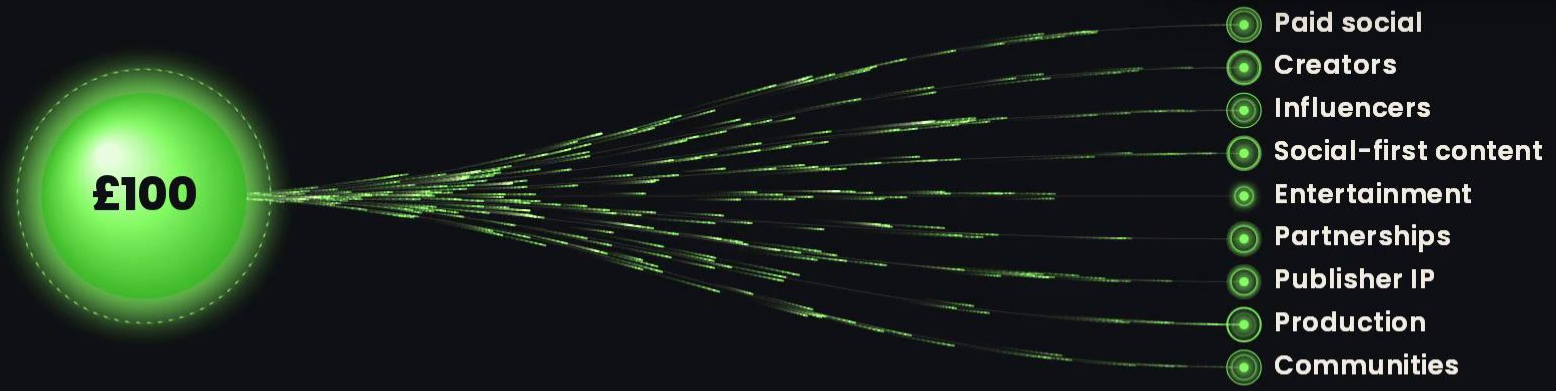
Source: Ofcom, Media Nations 2026

03 / WHERE BRANDS ARE PUTTING THEIR MONEY

One social budget, pulled nine ways.

£11.5bn

UK social ad spend in 2025. Up 21%, now 24.7% of all UK ad spend.



We still talk about social as a channel. **Brands increasingly budget for it as an ecosystem.**

Flows illustrative · Source: AA/WARC Expenditure Report, April 2026

04 / THE BIG SHIFT

From renting attention to building it.

OLD MODEL

Buy audience → Run campaign → Stop spending → Attention disappears

NEW MODEL

Build audience → Create content → Develop community → Earn distribution → Monetise attention

Brands are investing in audience infrastructure.

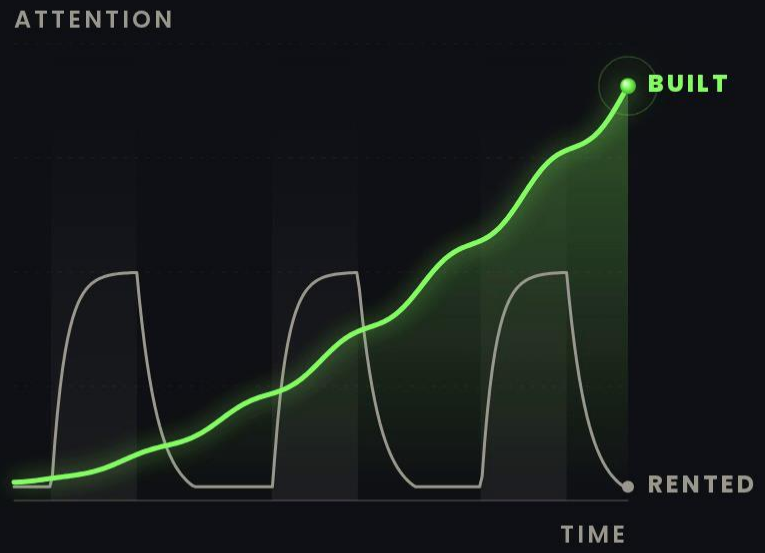


Chart illustrative

05 / FROM PUSH TO PULL

Brands used to push. Now they have to pull.

PUSH · the old model



Interrupt. Repeat. Pay again. The audience moves away, and attention leaves when the spend stops.

PULL · the new model



Earn attention. Hold it. Build a community that comes back, and let it compound.

06 / BRANDS ARE BECOMING MEDIA OWNERS

The most sophisticated brands are no longer only advertisers.

They are becoming media owners.

CAMPAIGN THINKING ASKS

"What should we say?"

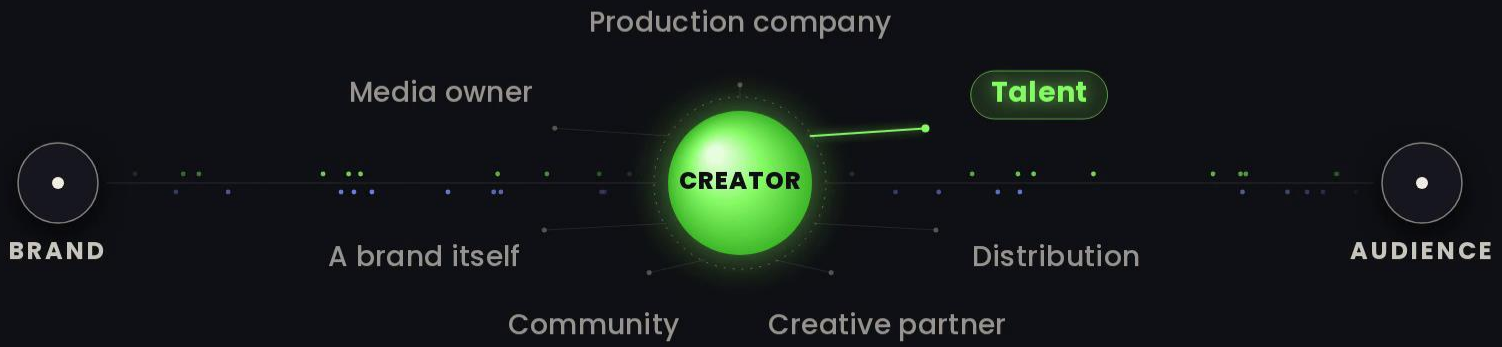
PUBLISHER THINKING ASKS

"What will people choose to consume?"

IS • CREATORS • RECURRING FORMATS • ENTERTAINMENT • COMMUNITIES • TALENT • IP • D

07 / WHICH BRINGS US TO CREATORS

Creators are now a core part of the media mix.

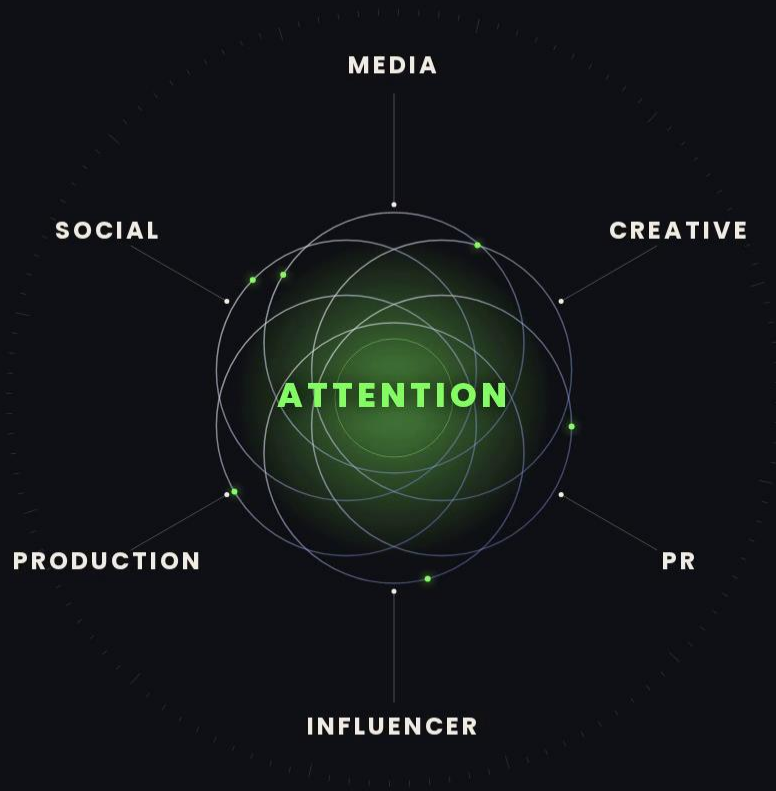


"A creator budget is no longer necessarily an influencer budget. It might be media, production, talent or creative spend."

£1.2bn

UK creator partnership spend in 2026. Up 26%, before paid amplification.

Source: IAB UK and IRM, UK creator partnerships study, 2026



08 / THE BUDGET LINES ARE COLLIDING

Everyone is competing for the same pound.

Publishers vs creators
Creators vs production companies
Platforms vs broadcasters
Agencies vs publishers
Brands vs all of the above, in-house

+17.7%
Social media, Q1 2026

-5.9%
Published media, Q1 2026

UK ad spend growth year on year · Source: AA/WARC Expenditure Report, July 2026

150M+

followers across Jungle's social publishing network

50K

videos created every year

Running this machine didn't teach us how to make viral videos.

It taught us how social audiences behave.

01 Attention has to be earned every day.

02 Platforms reward audience behaviour, not brand hierarchy.

03 Creative is distribution.

04 Speed of learning matters more than perfect planning.

05 Successful formats compound.

10 / CONSTANTLY CHANGING PLATFORMS

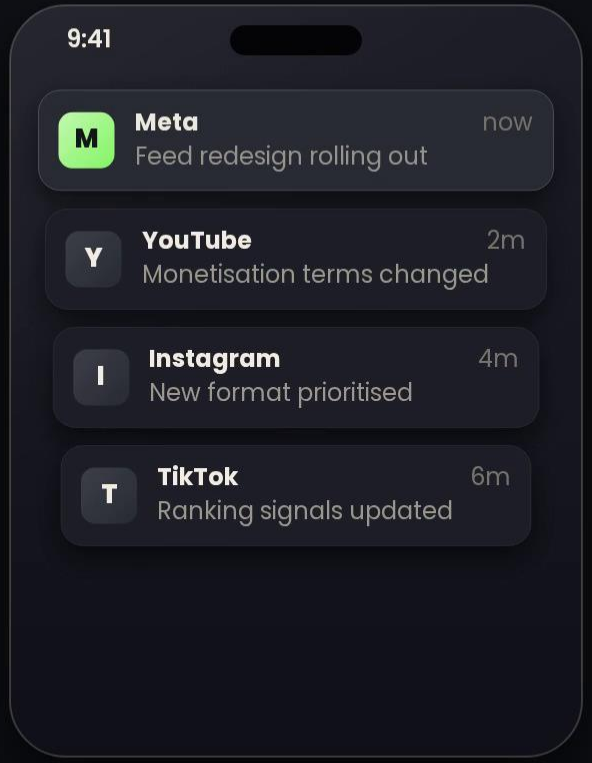
The platform doesn't owe you anything.

~~Don't optimise your business around the algorithm.~~

Optimise around audience behaviour.

TEST → LEARN → MOVE

Test fast across platforms, learn from how audiences behave, move effort to where attention is going.



Notifications illustrative

Content has become a portfolio.

THE OLD WAY

Hero campaign

↓

Cutdowns

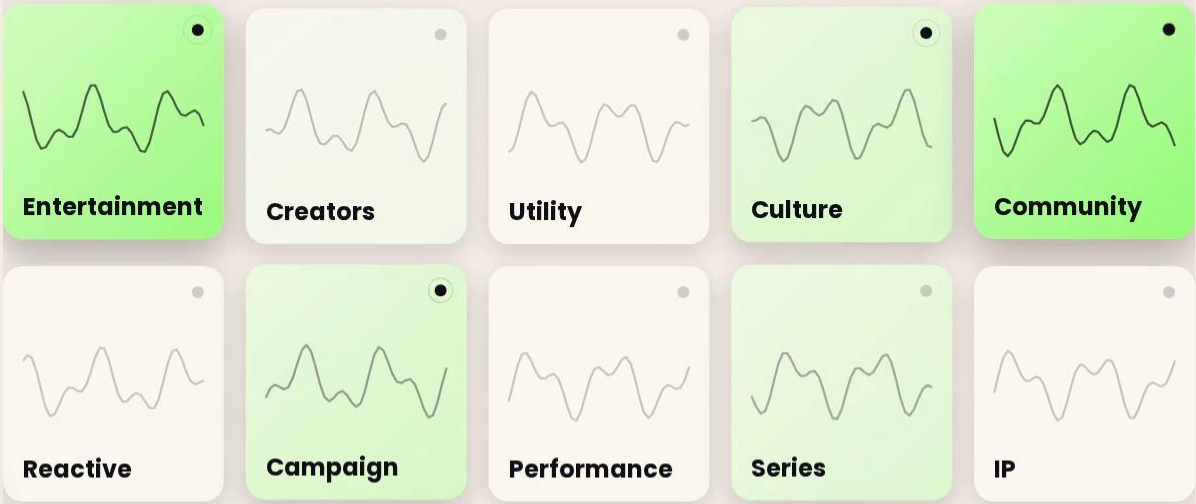
↓

Social

Less campaign commissioner.

More portfolio manager.

THE NEW WAY: ALL ON, ALL THE TIME



So who wins?

PUBLISHERS

Own audiences
Build IP
Know distribution
Sell beyond inventory

CREATORS

Own trust
Own communities
Move fast
Work across platforms

BRANDS

Own budgets
Own customers
Increasingly own audiences

PLATFORMS

Own distribution
Set the rules
Control monetisation
Change constantly

Where does the publisher sit when everyone becomes a publisher?

Move further up the value chain.

FROM

~~Selling impressions~~

TO

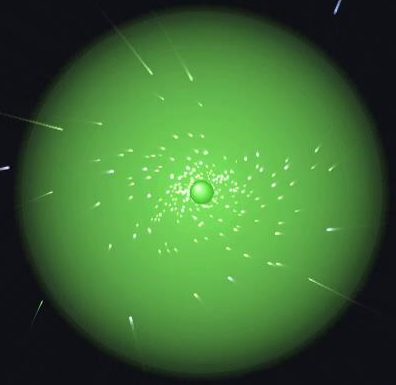
Selling what sits behind the audience.

We built the publisher first. Brands wanted the operating system behind it.



Attention moved first. Money is following.

The next battle is over who owns the relationship with the audience.





WHO'S BEEN TALKING

Jade Raad

Chief Growth Officer, Jungle

Jungle runs a social publishing network with 150M+ followers.

And a social agency that runs that operating system for brands.

Thank you.

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