

KANTAR MEDIA

2025

MEDIA TRENDS &
PREDICTIONS

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Want to feel confident about the future?

Then focus on people from every angle

Today's media landscape is shaped by a convergence of major trends, including market volatility, evolving industry dynamics, and the increasing complexity of media and technology.

Macro factors, such as international crises and political change, add further instability. At the core of these challenges, however, lies one dominant challenge for media buyers and sellers: *a crisis of confidence*.

And when confidence is lacking, regulations tend to tighten, audiences can shift, business models and revenue streams might be disrupted, and investment can dry up.

However, the current situation, though challenging, does not pose an existential threat. This report highlights several reasons for optimism, notably sustained advertising expenditure and the advent of emerging technologies. The latter, in particular, are poised to drive growth, foster innovation, and enhance industry resilience.

But ad spend growth or investing in new tech alone will still not resolve the industry's core challenges. The future of media ultimately depends on a renewed focus on people – both within the industry and the audiences it serves.

Indeed, the sector's most valuable asset is its highly skilled workforce, and their ability to innovate and adapt will be critical in steering the industry forward. Beyond just driving technological advancement, these individuals are the ones who can interpret and apply the tools of AI and data to address the unique challenges of today's media landscape. Their insights, creativity, and strategic thinking will be the foundation upon which future success is built. But we need more of them, and the ones we have need to embrace and learn new skills.

Equally important is the role of people as consumers. The media industry exists to serve audiences, and understanding the evolving preferences and behaviours of these consumers will be key to shaping media strategies. In a world where online experiences are more immersive and personalised, people's media consumption habits are increasingly fluid.

The ongoing shift in how audiences engage with content – from linear television to streaming, social media, and beyond – presents both an opportunity and a challenge. Success will depend on the industry's ability to not only deliver compelling content but also to accurately measure how, when, and why people engage with it.

That's why people-powered measurement is the final crucial element in this equation. At its core, it's about understanding audiences at a granular level, utilising data-driven insights to refine strategies for reach, engagement and monetisation.

But again, it's also about the people behind the metrics – the data scientists, analysts, marketers, and strategists who make sense of complex data sets to inform decision-making and build compelling narratives. They bridge the gap between raw data and actionable insights, enabling businesses to respond to changing audience behaviours with agility.

In this context, the media industry's future rests not only on the technological innovations that will shape its operations but on the people who drive those innovations and the consumers who ultimately engage with them. 2025 will require a balance between leveraging cutting-edge technology and fostering human expertise and creativity. By focusing on both, the industry can bolster confidence, de-risk decision-making, tap into new opportunities, and continue to evolve in a way that's both innovative and sustainable.



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The media ecosystem

Optimism, convergence
- and an identity crisis

Rising ad spend and blurred boundaries are transforming media, presenting both challenges and opportunities for a market in flux



2024 Trends

A trillion reasons to be positive about advertising investment

Despite a range of trends causing a crisis of confidence for the sector, ad investment is one of many reasons to feel optimistic. In 2024, global advertising expenditure was forecast to increase by 10.5% to reach a milestone of \$1.07 trillion, marking the strongest growth in six years, according to WARC's Global Ad Spend Outlook. This level of growth, initially forecast by GroupM to occur in 2025, was spurred by significant investments across various regions and channels.¹²

North America, buoyed by US election advertising, led with a forecast of +8.6% to \$347.5bn. In Europe, ad spend is forecast to rise by 5%, with the UK securing the largest spend in the region, growing 8% to \$47.5bn.

Meanwhile, social media in all its forms – now the largest single category, having overtaken search, and excluding YouTube in WARC's methodology – accounted for 22.6% of global ad spend. Meanwhile, retail media – advertising placed on a retailer's media network – emerged as the fastest-growing channel, expected to double its share to 14.3% by 2026.

TV continues to grow across most formats. Indeed, as more delivery formats become available, the more apparent the power of the TV set itself – the second-strongest growth channel, for instance, is expected to be connected TV (CTV) with a 19.6% increase in ad spend to \$35.2bn.

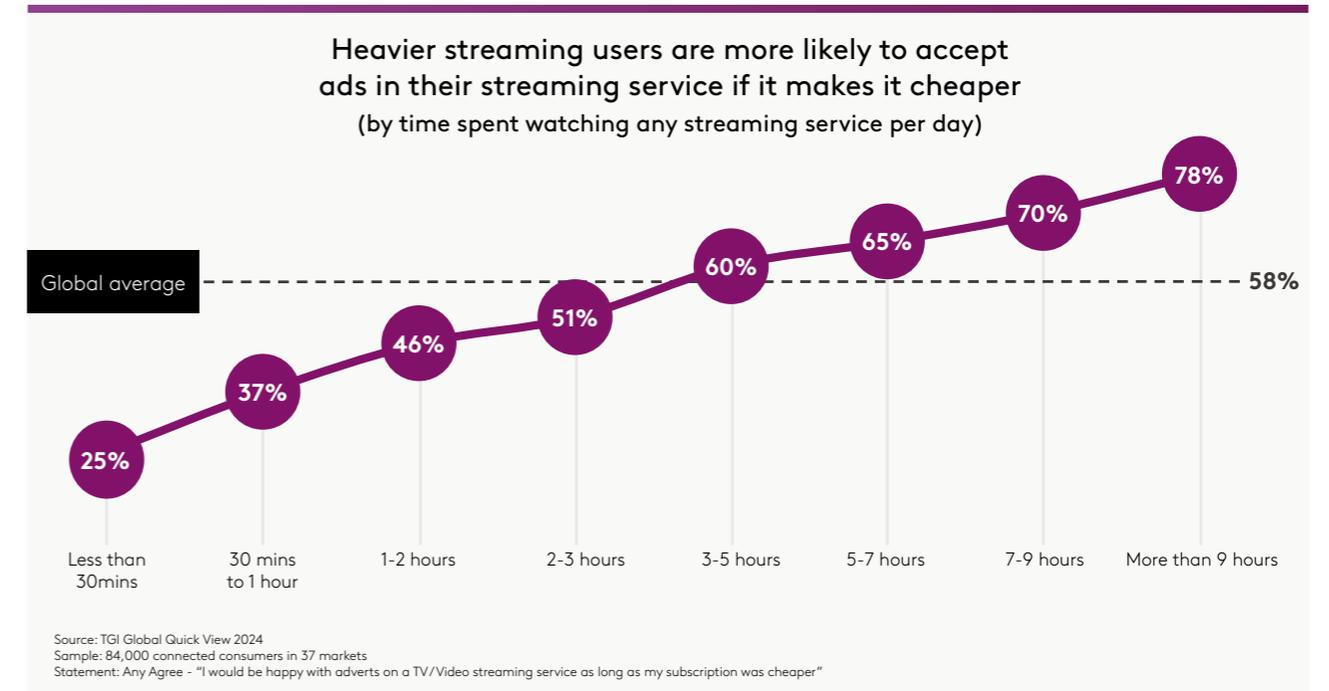
Convergence spreads...

While advertising remains a core focus, 2024 saw media brands increasingly diversifying their business models to stay competitive in an evolving, hybrid media landscape. This shift reflects the growing need to expand beyond existing revenue streams, with businesses exploring new partnerships and opportunities across platforms to keep pace with changing consumer behaviour, technological innovation, and increased competition.

For example, VOD platforms that lean on subscriptions are increasingly deploying a blend of paid subscriptions and ad-supported models – and Kantar Media's TGI Global Quick View data indicates that 58% of connected consumers globally would accept adverts if it reduced their TV or video streaming subscription costs.

Interestingly, there's a clear difference between heavier and lighter VOD viewers, with heavier users far more open to ads (see chart). Often subscribed to multiple services, they're motivated by the chance to lower their monthly costs. Lighter users, however, tend to resist ad-supported models, likely due to time constraints that make ad interruptions less appealing. These distinctions highlight the need for targeted strategies to convert different audiences.

This continued shift towards hybrid business models – often characterised by experimentation, false starts and dead ends – is becoming a staple across the industry. Many media brands, whether they started as native VOD services, broadcasters and networks, or as print editions, are now capitalising on a variety of monetisation strategies to leverage their content and audience reach effectively.



...and an identity crisis unfolds

As media brands experiment with new business models, the industry is also grappling with a growing identity crisis as existing boundaries between platforms blur, creating a converging ecosystem of multifaceted media brands.

This transformation is more than just semantics; it represents a fundamental shift in how content is created, consumed, and distributed. The situation is further complicated by naming conventions that often confuse both audiences and industry professionals, potentially undermining audience classification efforts when there is uncertainty about inherently similar VOD differentiators like AVOD, SVOD, BVOD, and TVOD.

These technical (or sometimes legal) terms, which are frequently based on definitions that can become outdated quickly, also pose barriers to understanding and engagement, making it challenging for the media to connect with its audience and effectively convey important information.

Meanwhile, others believe CTV itself is a needlessly complex term, and the industry should focus more on the quality of the content and less on the buying mechanisms – and just call it TV!⁵

There is a similar appetite for simplification elsewhere too. As linear TV's definition becomes less obvious, for example, some industry voices are talking of 'convergent TV', a term that would better represent the convergence of various television distribution platforms and technologies into a single, integrated viewing experience.⁴

What's in a name?

This report was produced using media definitions that are broadly, though not universally, shared across the sector, aligning with those referenced in both WARC's and GroupM's ad spend forecasts. Where nuances or convergence occur, we have noted them and acknowledge that some definitions remain in flux.

Synthetic media heralds a new era

On the subject of complex media definitions, the industry collectively shone a spotlight on a relatively new term in 2024: *synthetic media*. This refers to the ability to generate highly realistic, entirely machine-made content using artificial intelligence (AI).⁵ Whether the name sticks or not, synthetic media is poised to have a profound impact on the sector.

Major media owners – including the UK's largest commercial broadcaster, ITV, and Amazon Ads – have already trialled producing ads and tools using generative AI (see page 18)⁶, while at the user level, the influence of synthetic media is widely apparent. Social media platforms are flooded with synthetic art, music, text, and video, while AI is also helping produce podcasts and edit video, allowing anyone to compete with those with larger production budgets.

Although 'synthetic media' is not considered its own unique delivery form, it has already begun to shape other types of media, and 'synthetic data' is even being trialled in some forms of media measurement (see page 40).

What's next in 2025?

Media channels at a glance

Television & video

TV is now a converged media, incorporating multiple platforms where linear, connected, and streaming coexist among myriad other definitions.

	 Linear TV	 Connected TV (CTV)	 Streaming/VOD
Challenge	<p>Fragmenting viewership continues as audiences shift to on-demand streaming platforms, making it harder for advertisers to justify large linear TV budgets in isolation.⁷ However, the speed of change differs from market to market – which is why it's essential to use tools like Cross-Platform View™ to understand the direction and pace of the change.⁸</p>	<p>The CTV market is highly fragmented with many devices and platforms, making it difficult for advertisers to track who is watching and when.</p>	<p>Saturation of the streaming market and budget restrictions are forcing platforms to reduce the number and cost of content commissions, limiting fresh, exclusive shows. Meanwhile, subscription fatigue is a growing issue.¹¹</p>
Opportunity	<p>Linear TV is both highly trusted and secures massive audiences during live events like sports and news.⁹ And new collaborations, such as Freely in the UK, bring broadcaster linear and on-demand services together into the same CTV platform to maximise prominence and enable accessibility.¹⁰</p>	<p>CTV offers precise audience targeting, giving advertisers the ability to refine campaigns and reach specific segments. The growing number of CTV devices globally also opens up new revenue streams.</p>	<p>Streaming services are exploring additional revenue streams through advertising formats, merchandise, gaming, and experiences linked to popular shows, tapping into fan loyalty.¹² Additionally, subscription bundling and a move into sports should help to overcome churn.</p>



	 News and magazine media	 Out of home (OOH)	 Social media	 Search	 Cinema
Challenge	<p>Print editions continue to experience a sizeable shift, with fewer advertisers willing to invest in print ad spaces alone despite high trust and effectiveness. Meanwhile, online news and magazine platforms grapple with the rise of ad-blocking, synthetic content, growing privacy concerns, and the (uneven) phase-out of third-party cookies.</p>	<p>Whilst solutions are under development, attribution and economic modelling remain a technical obstacle for out of home.¹⁴</p>	<p>As new AI tools – including deepfakes and chatbots – become more widely available, platforms will need to find new ways to manage the dissemination of misinformation, disinformation, and toxic content.¹⁵</p>	<p>Search algorithms are increasingly complex, and generative AI tools are changing how users search for information, making long-standing SEO strategies a lot harder.</p>	<p>With the rise of streaming services, sophisticated home entertainment systems, and soaring production costs, fewer films are being made for theatres, and audiences are becoming more selective. This places pressure on studios to produce films that are both critically acclaimed and commercially successful – a crisis of confidence that sees studios more often than not lean into safe bets, often based on established franchises.¹⁹</p>
Opportunity	<p>Print is witnessing some renewed interest as screen fatigue grows, with readers valuing its tactile nature. It also offers premium brand-building inventory for advertisers, particularly when targeting niche audiences who view print as more trustworthy.¹³ Beyond print, programmatic advertising continues to advance, leveraging first-party data to deliver more personalised and effective ads.</p>	<p>Digital OOH offers dynamic, flexible ad options in high-traffic areas, remaining one of the few mass-market channels available, alongside TV set viewing. Innovative campaigns, like tailored interactive billboards, are also creating memorable experiences for audiences. Moreover, integrating OOH with other channels, such as mobile and digital radio, can create a more comprehensive and impactful marketing strategy.</p>	<p>With forecasts projecting 60% of time spent on social platforms in the US in 2024 to be accounted for by video¹⁶, and the growing opportunity for social media as a discovery channel signals a significant shift in search dynamics, presenting new opportunities for platform growth as brands shift strategies and investments. Incorporating in-app search ads can merge the utility of search engines with the cultural resonance of social media, creating a more effective and holistic approach to consumer engagement.^{17 18}</p>	<p>Voice search and AI-powered search tools represent new, ever more intuitive ways for users to discover content. There's also significant potential for search engines to dominate AI-led experiences – if they adapt quickly.</p>	<p>As <i>Dune: Part 2</i> demonstrated, premium cinema experiences like IMAX, Dolby Cinema, and event screenings prove cinema still offers unrivalled shared experiences impossible to replicate at home – and appetite is high post-pandemic.²⁰ Event movies and live-streamed events in cinemas are also a growing trend.</p>

	 Online audio	 Radio	 Retail media
Challenge	<p>Lower barriers to entry have flooded the podcast market, making it harder for new shows to stand out. Fast-forwarding through podcast ads is also a significant problem for advertisers.²¹</p>	<p>The diversification and fragmentation of the listening experience opens up new measurement and monetisation issues as established radio brands seek to leverage their increasingly diverse platforms.²³</p>	<p>Delivering a seamless omnichannel experience remains difficult as retailers grapple with balancing physical and online advertising forms.²⁴</p>
Opportunity	<p>Podcasts continue to grow in popularity (as do live events for many podcast hosts), offering brands a highly intimate way to connect with listeners. Many podcast listeners look up products mentioned by hosts, providing unique conversion opportunities for advertisers.²²</p>	<p>Radio's reach still remains high and it is a highly trusted source of curated content, with the potential to blend linear and streaming offerings. Being largely a live media, it also builds connections and communities through shared listening. Digital extensions of radio, like podcasts and on-demand shows, are adding reach and appeal to new audiences.</p>	<p>Retail media is rapidly growing, driven by first-party data and the ability to personalise ads in real time. Brands can directly track the impact of media on sales, offering clear attribution and better return on investment. As a new media, it is also benefiting from huge hype and interest as brands experiment.²⁵</p>



Content

The boom, bust,
and battle for
audience attention

Market saturation, shifting generational preferences, and technological advancements are revolutionising how audiences engage with content — challenging media groups and platforms to innovate and adapt

2024 Trends

Streaming bundles help combat subscription fatigue

In 2024, many media companies introduced bundled streaming services as part of their continued efforts to tackle subscription fatigue. Viewers, increasingly frustrated with the expense of juggling multiple subscriptions, often cancelled after consuming specific content, leading to higher churn rates. According to data from Kantar Entertainment on Demand, this trend of 'subscribe, watch, cancel, repeat' – known as boomerang behaviour – has become more prevalent as consumers seek to reduce costs, and was identified in 46% of US consumers over the last 12 months, and 23% in the UK.^{26 27}

Bundling or aggregation is a strategic response, offering more content at a lower combined price to help retain subscribers. In the US, Disney, Hulu, and Max launched a combined bundle together, simplifying the consumer experience, while Comcast launched a package that included Apple TV+, Netflix, and Peacock.²⁸ Amazon Prime Video

users in the US will also be able to subscribe to Apple TV+ through Prime Video – the latest service to join over 100 streaming services on the platform.²⁹ As bundling gained traction, it became clear this approach could help mitigate churn and stabilise the market.

End of the content boom?

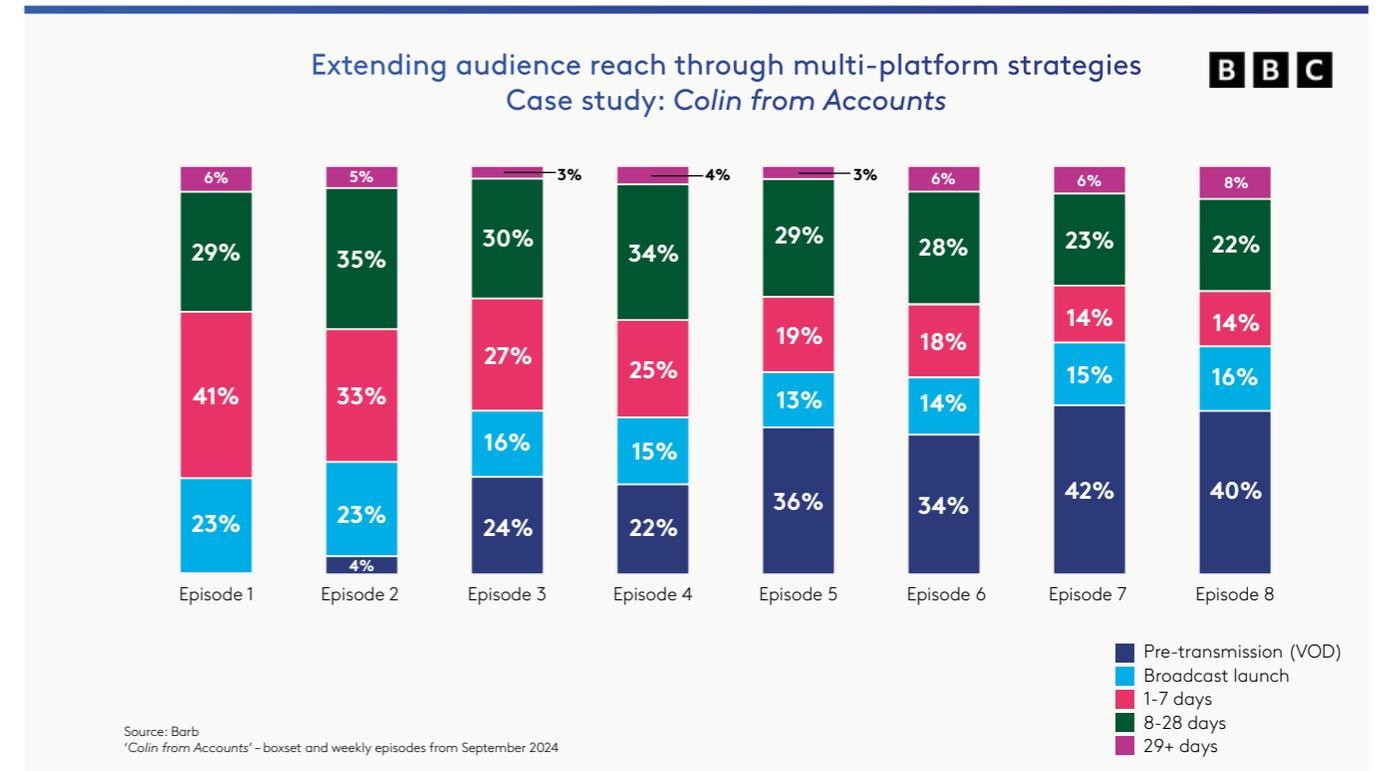
The challenges of market saturation have also led platforms like Disney+, Netflix, and Amazon to be more selective in their investments in original content, or to lean into established libraries. Rising production costs, coupled with intensifying competition, have forced companies to reassess their strategies.

Audiences have also started noticing the rapid commissioning and cancellation cycles (as well as the impact of the 2023 writers' and actors' strikes), with fewer new releases than during the peak years of the streaming gold rush. In the second quarter of 2024, the number of US productions dropped by 40% compared with the same period in 2022, while global output saw a 20% decline, according to ProdPro.^{30 31}

Despite the cooling market, audience demand for content remains strong – but requires a balance. For example, Kantar Media's TGI shows that, on average, 43% of connected consumers across 37 markets prioritise the type of content offered when choosing a platform, while 42% focus on the quantity available. This suggests that, even as the streaming boom wanes, the quality and diversity of content will continue to drive consumer decisions.



The chart below illustrates the viewing lifecycle of the comedy *Colin from Accounts* in the UK, showing audience engagement across live BBC broadcasts and the streaming platform iPlayer. It demonstrates how a 'boxset' release strategy sustains viewership over time.



Generational content preferences shape streaming strategies

Generational differences in content preferences significantly shaped streaming strategies in 2024. Globally, younger audiences (aged 16–24) exhibited a strong preference for animations, Korean dramas, and Hispanic/Latina shows according to Kantar Media's TGI. This is leading to platforms like Netflix greenlighting more animated series, particularly anime, to cater to these viewers.³²

In contrast, older audiences, particularly those aged 55–64, show a marked preference for action and adventure movies, and are 33% more likely to seek out such content compared with younger groups. Crime, thriller, and mystery films also gain popularity with age.

This generational shift reflects broader changes in content consumption, with viewers under 35 more likely to favour diverse and global programming. Korean dramas, in particular, have gained a huge following in this cohort. As streaming platforms compete to meet these varied tastes, their programming decisions have certainly become more tailored, ensuring a richer, more engaging viewing experience for all generations.

Synthetic content

The rise of 'synthetic' media, powered by AI advancements, is beginning to transform the content creation landscape. AI-generated content is becoming increasingly sophisticated, enabling the production of hyper-realistic, yet entirely machine-made, media. While this technological leap brings concerns around misinformation and disinformation, it also opens up new avenues for creativity and innovation.³³

Production companies like Lionsgate are embracing AI in both pre- and post-production, collaborating with firms like Runway to tap into extensive media archives, while Amazon has also begun offering cost-conscious advertisers AI image, video and audio generators.³⁴

Meanwhile, social media is now awash with synthetic content as users are given access to powerful generative AI tools to help create images, text, video, and audio. The tools also help with previously off-limits editing and production capabilities.

However, as synthetic media moves into the mainstream, the industry faces pressing ethical challenges around authenticity. The growing prevalence of AI "deepfakes" is already eroding confidence, enabling people to dismiss or question real events more easily. It also introduces lots more content into the media ecosystems, making the fight for attention even tougher.

Content moderation put to the test

In 2024, X (formerly Twitter) became a global experiment in testing the limits of ‘free speech’ online – while highlighting the significant business challenges of abandoning content moderation. After loosening its policies in favour of a more absolutist interpretation of free speech, the platform faced a complex – and largely negative – reality. To much fanfare and threats of legal action, brands and advertisers withdrew their ads, citing concerns about brand safety. In Brazil, X was even temporarily blocked for failing to comply with regulations regarding unmoderated content.

To illustrate the scale of the issue, X’s September 2024 transparency report revealed a sharp decline in enforcement, with only 2,361 accounts penalised for hateful content in the first half of 2024, compared with one million in late 2021.³⁵ This stark contrast demonstrates the critical role content moderation plays in today’s media ecosystem, as sentiment and levels of engagement have fallen.^{36 37}

Olympics drive viewership in 2024

The Paris Olympics sparked a significant surge in global viewership, with broadcasters reporting record-breaking numbers. In the host nation, France Télévisions averaged 23.2 million viewers for the opening ceremony, peaking at 25.2 million. BeIN Sports reported a 145% increase in the Middle East and North Africa compared with Tokyo 2020, while NBC Universal reported an 82% rise in the US, with 30.6 million viewers tuning in across live and primetime catchup on all platforms.³⁸

Warner Bros. Discovery, holding exclusive pay-TV rights across much of Europe, witnessed streaming records for the Olympic Games.³⁹ Meanwhile, over 300 million people engaged with Olympic content on social platforms, highlighting the growing importance of a diverse distribution strategy.

In many markets, such as Brazil, the Olympics have certainly retained – and even expanded – their ‘must-see’ status, attracting enthusiastic advertisers and driving a 37% increase in investment in the sports category from January to July 2024 compared with the previous year.⁴⁰ These trends highlight the enduring appeal of live sports, particularly for linear television, which continues to play a critical role despite shifting viewing habits. Among those who watched sports last year, 78% did so on TV.⁴¹

What's next in 2025?

Sports will propel direct-to-consumer models but widen inequalities

Sports content maintains strong viewership across platforms, particularly linear. However, we are seeing a plateau in the value of sports rights, especially outside marquee leagues like the Premier League or Formula 1. Leagues such as Ligue 1 and Serie A struggle to command premium rights prices, prompting some rights holders to explore direct-to-consumer (DTC) streaming models as a way to retain control over distribution.⁴²

This shift has two significant impacts. First, while DTC models offer fans more direct access to content, they also fragment the viewing experience, making it more challenging for audiences to know where to watch all major events, especially with global streamers buying exclusive rights. This also risks damaging the long-term appeal – and therefore value – of a sport, as it's likely to lose saliency with the wider audience.

Second, from an audience measurement perspective, widespread out-of-home consumption reinforces the need to measure in and out-of-home viewing – a significant opportunity for both buy and sell-sides to calculate the reach of their content and advertising in totality.

AI will accelerate innovation and erode cultural barriers...

Algorithmic content sorting and discovery is increasingly prevalent. As the rise of generative AI and synthetic content gains traction, the potential for content providers to tailor their content to please algorithms becomes possible.

Moreover, AI-powered real-time translation could also alter how content is consumed globally, allowing media to transcend language barriers beyond closed captions. Technologies like AI dubbing and speech translation, as we saw during Meta's 2024 Developer Conference, could enable viewers to experience content in their native languages without losing cultural nuance.⁴³

This development has enormous potential for media companies, live streamers and advertisers, who will be able to target global audiences with much greater ease and higher levels of personalisation. Localised content, which has already gained popularity in markets like Brazil and South Korea, will only expand further as AI bridges linguistic gaps, creating shared, global content experiences.

... but questions about authenticity will endure

AI's ability to create highly convincing fake content – whether videos, images, or audio – makes it easier for people to question the authenticity of real-world events.

Kantar Media's TGI data shows that 60% of connected consumers are concerned that technology is causing society to lose touch with reality, a fear that extends into the media sphere.

Whilst media companies continue to make great progress in harnessing the power of AI as a force for good in driving an improved consumer experience, they will need to prioritise privacy-preserving technology and public education to counteract misinformation and build and retain media brands that people can trust.

The future may therefore see a push towards more authentic, human-driven content, as users and creators become more discerning, and media sellers better understand how authenticity and human connection drives engagement.



The future of engagement

Media companies will need to evolve to meet changing consumer demands. As competition intensifies and technology advances, innovation beyond existing models will be crucial. Personalisation, for instance, offers a growing opportunity that complements the broad reach of mass media. By leveraging data-driven insights, media buyers and sellers can create more tailored content experiences, ensuring relevance and engagement in an increasingly fragmented landscape.

Additionally, bundling services and adopting hybrid revenue models – integrating advertising, subscription, and e-commerce – will be key to attracting and retaining audiences. As media analysts like Evan Shapiro suggest, those who fail to adapt to these dynamic, consumer-centric ecosystems will struggle to thrive. Buyers and sellers alike must embrace a more personalised and flexible content experience, benefitting both creators and audiences.

Social media regulations come into force

There has been a significant push for stricter regulations on social media platforms to protect users, especially children, from harmful content. The Online Safety Act in the UK and the Digital Services Act (DSA) in the EU are key examples of this trend – and social media companies will face ‘very significant changes’ as the new legal safeguarding rules come into force in 2025 after a grace period.⁴⁴

These changes will likely include stricter content moderation practices, increased transparency about their algorithms, and potentially higher penalties for non-compliance.⁴⁵



Data, tech, and analytics

Navigating privacy,
regulation, and the rise of AI

The convergence of privacy safeguards, evolving consumer expectations, and the rapid growth of new technologies means businesses must now balance innovation with trust

2024 Trends

The evolving role of consumer choice in a world looking beyond cookies

Google's announcement that it will retain third-party cookies on Chrome was widely seen as a pragmatic move in July 2024. Despite cookies' reputation as a controversial tool in online advertising – often criticised for data collection practices that overlook consumer privacy – Google encountered challenges in gaining industry-wide support for their removal.

Yet the efforts advertisers have invested in seeking alternatives have not been wasted – they have provided valuable insights into how much more informed and discerning consumers have become about the ways in which their data is shared, monetised, and utilised.

The real imperative for the industry now is to recalibrate its approach to data collection, collectively adopting a new guiding principle. With the rise of consumer data regulations, including GDPR and CCPA, the focus must shift towards consumer choice. Advertisers need to prioritise transparency, empowering individuals to understand how their data is being used and ensuring robust privacy protections are in place.⁴⁶

Clean rooms sparkle

Data clean rooms are now playing a prominent role in bringing data sets together. While techniques for 'blind matching' data sets are long established, clean rooms provide businesses with a secure, controlled environment for sharing and analysing data. This allows them to collaborate and extract valuable insights without compromising sensitive information or privacy.

In an era where data breaches and consumer distrust are ever-present challenges, clean rooms offer an appealing mechanism for techniques like panel exchanges. They also significantly reduce risks, with data protected throughout its lifecycle.⁴⁷

Openness to new data solutions

As data sets become increasingly complex, organisations are seeking solutions and tools that can seamlessly work with multiple data sources. In 2024, the demand for planning and analysis software tools across audience data sets certainly grew as businesses faced diverse data types and evolving needs. While not all data is of equal quality or depth, businesses require tools that enable them to access and analyse various data sets without being confined to specific formats or sources.

The growing use of software to allow media buyers and sellers to mine, interpret, and integrate a wide range of data sets – whether from TV audience data, online behavioural data, or first-party data sources – is crucial.

By embracing platforms and software that can process data both at scale and at speed, media buyers and sellers can foster a more comprehensive understanding of audience behaviour and media performance, ensuring no valuable insight is overlooked. As the need for these solutions grows, businesses will increasingly turn to tools that promote openness, collaboration, and greater data integration.



Generative AI

Generative AI may well be the term of the year, and in 2024 the media and advertising world truly began to explore how AI, in its many forms, might transform the creation, consumption, and monetisation of media. One of its most significant impacts has undoubtedly been on advertising.

Previously, creating personalised ads was a time-consuming and resource-intensive process. However, generative AI can now quickly generate highly targeted and relevant ads based on individual user data. Even TV ads have been tested and generated this way – although largely for small, local businesses that could not afford a big-ticket, human-crafted ad.⁴⁸

Generative AI is also being used to create more immersive and engaging content experiences. For instance, AI-powered tools can generate personalised video content, interactive articles, and even virtual influencers. This has opened up new opportunities for brands to connect with their audiences in innovative ways.

However, AI has also faced some cultural pushback. It has also become a source of humour on social media, where ‘count the fingers’ has emerged as a meme poking fun at AI’s frequent inability to accurately depict human hands. Indeed, AI-generated art is even mockingly referred to by younger people as ‘boomer art’ because it fools so many older people – giving it an embarrassing aspect that may impact how it’s used and perceived.⁴⁹

What do we mean when we say ‘AI’, ‘machine learning’, or ‘generative AI’?

AI refers to the overarching field dedicated to creating intelligent systems – both adaptable and autonomous – capable of performing tasks typically requiring human intelligence. Machine learning, a subset of AI which the industry has used for decades, involves algorithms that learn from data to make predictions or decisions – which are integral to refining audience insights and targeting.

Within machine learning, deep learning uses neural networks to process data in complex ways, allowing models to recognise patterns and make sophisticated inferences. Neural networks are one of many AI approaches; other methods include decision trees, which split data into branches based on specific conditions for targeted predictions, and genetic algorithms, which optimise solutions by simulating evolutionary principles.⁵⁰

Generative AI, a key branch of AI, is focused on models that can create content, such as text, images, or video. Large language models (LLMs), a specific form of generative AI, use deep learning to understand and generate human-like text, with transformative applications in content creation, personalised advertising, and consumer engagement.⁵¹



What's next in 2025?

Data clean rooms offer more than just security

The rising popularity of clean rooms for combining and exchanging data sets signals a broader industry shift towards privacy-first solutions and a growing desire to adopt hybrid measurement approaches which manage and integrate more data sources. This trend fosters collaboration between media buyers and sellers as the industry strives towards a more integrated picture of content and campaign performance.

As the industry looks for future-proofed measurement tools, data clean rooms are evolving to become a standard practice, especially as more affordable options emerge. However, as with any new technology, their capabilities need to be fully explored.

Once the data has been exchanged in a clean room or other matching technique, it's absolutely essential that data refinement pipelines are established. This aspect has been little understood and consequently has been a core focus for Kantar Media, particularly in order to manage consent, data individualisation, and ensure the data combined in clean rooms is ready for high quality industry measurement.

Regulation could slow down AI aspirations

Although there's little doubt that AI will be subsumed into many existing technologies, platforms and ways of working, the gold rush might be tempered – in some markets at least – by regulations. For example, Meta's latest AI technology will not be launched initially in the UK and EU because of 'regulatory uncertainty'.⁵²

This Meta decision is indicative of the growing trend of governments and regulatory bodies worldwide to implement measures to mitigate the potential risks associated with AI. These risks include privacy violations, job displacement, and the potential for AI to be used for malicious purposes.

Machine learning, rebranded

Many existing machine-learning and algorithmic technologies are likely to be rebranded as AI during the ongoing hype cycle. This trend is driven by public perception, as AI is now a buzzword associated with innovation and intelligence, making it an attractive label for securing funding and attention. Companies often seize the opportunity to rebrand their products to align with this hype, even when the underlying technology is not new.

For instance, natural language processing and recommender systems, which have been around for decades, are now frequently marketed as AI-powered solutions. While some advancements in AI are indeed transformative, it's crucial to critically assess claims, as many 'AI' offerings may simply be repackaged versions of established technologies.

Similarly, many statisticians could see a rebrand as 'data scientists' in response to the growing demand for associated tech roles – which might mask the industry's very real need for AI and big data expertise (see also page 53).

There's also the danger that those who are sceptical or concerned about the use of AI – including regulators – may push back against technologies that have actually been around for a while but have been rebranded as AI.

Beyond the AI hype lies genuine progress

While AI has generated a lot of headlines through 2024, it's important not to lose sight of the field's remarkable advancements. Despite the buzz, researchers and industry leaders are making substantial investments to refine AI systems, improve reliability, and address issues such as interpretability and ethical standards.

Progress in AI is real, with emerging solutions that offer new levels of insight into consumer behaviour, enhanced content personalisation, and better ad targeting, benefitting media owners, brands, and audiences. While some technologies will be rebranded rather than reinvented, the pace of AI advancement remains remarkable, with genuine innovation driving capabilities that were previously unachievable.

The focus on measurable improvements in this space means that every setback – however public – also leads to valuable adjustments, strengthening AI's role in the media industry's future. As the industry continues to evolve, maintaining a balanced view of AI's risks and rewards will allow the industry to harness its true potential in 2025 and beyond.

Audience measurement

Redefining the status quo for a fragmented media world

A mix of big data, emerging technologies, and a renewed emphasis on panels is enabling more precise understanding of audience behaviour. At the same time, collaboration and cross-media measurement are becoming essential in navigating today's increasingly complex media landscape

2024 Trends

Collaboration grows

2024 cemented collaboration as a key characteristic of the media industry, with stakeholders recognising that increased co-creation and joint efforts can deliver new data to serve the growing use cases for measurement. Research partnerships are certainly driving the development of new audience measurement solutions, as seen with the advertiser-led Origin (UK) and Aquila (USA) services, and the Netherlands' cross-media architecture initiative, NMO. These services serve to connect data sets, offering media buyers and sellers a more holistic view of audiences across platforms and media.

In the UK, broadcasters ITV, Sky, and Channel 4 have launched Project Lantern, a collaborative panel designed to measure TV's impact on campaigns across channels. Similarly, Barb and PAMCo, the UK's respective TV and print measurement bodies, are testing shared data collection methods, seeking to provide more unified audience insights.

Hybrid consensus

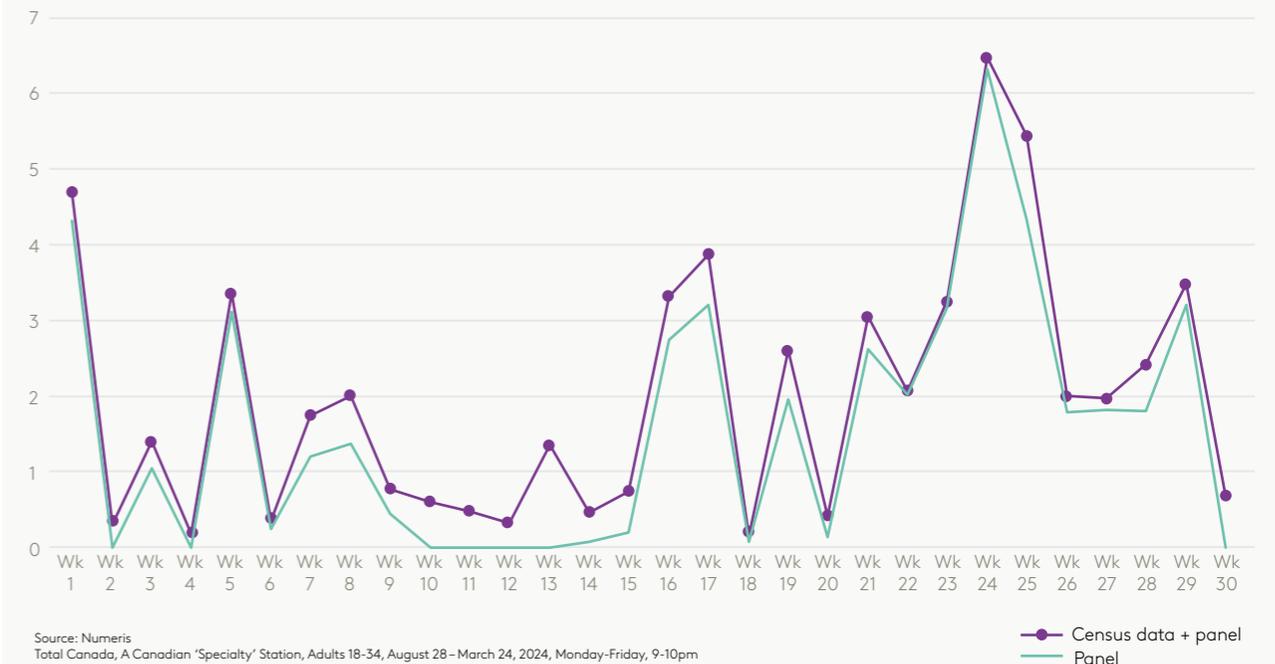
Although hybrid solutions – the integration of panel data with big data – have been an important part of audience measurement for some time now, 2024 marked a new phase.

Big data provides data at scale, but often lacks the demographic detail needed to fully understand audience behaviour. On the other hand, panel data offers rich demographic insights and tracks usage across the various separate platforms, generating data sets that are critical in establishing reach and frequency.

Recent data fusion initiatives, including the UK's Barb Panel Plus tender, Spain's Panel and HbbTV pilot project, and Canada's Numeris VAM initiative, aim to advance TV measurement by integrating representative panel data with large-scale data from devices and/or operators. These latest hybrid approaches enable a bigger data sample, unlocking a more granular view of audience viewing.

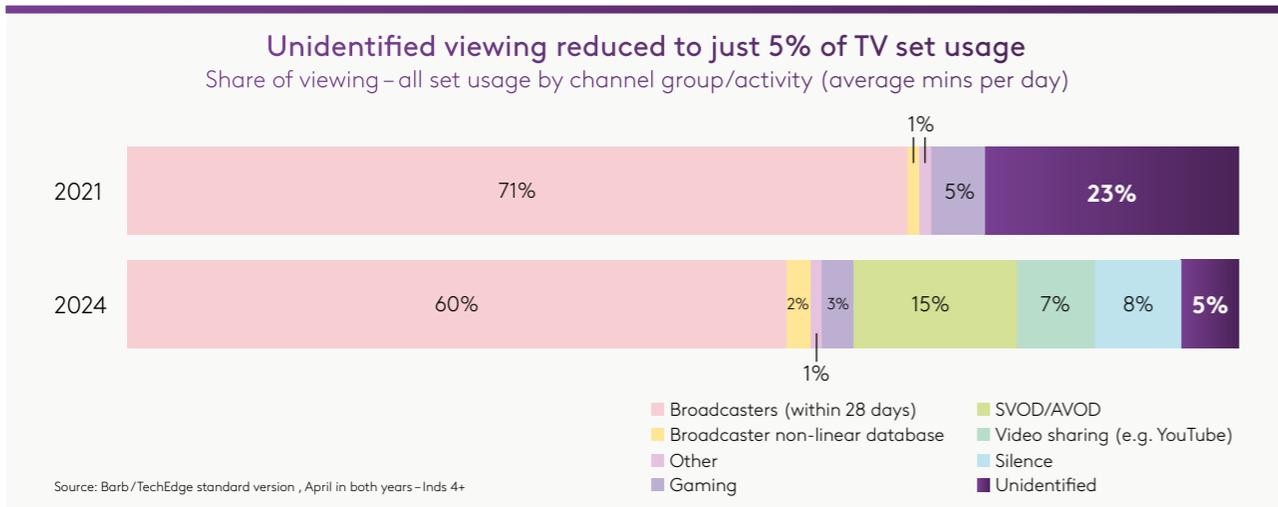
Beyond TV viewing, the integration of big data's scale and panel data's accuracy also offers a reliable measurement solution in a world looking to move beyond reliance on cookies, where privacy regulations demand accurate consent-based audience insights.

Mitigating zero-rated audiences through hybrid measurement



By incorporating operator data with the existing panel, Numeris in Canada has significantly reduced the number of zero-rated programmes.





Working with Kantar Media, Barb in the UK has significantly reduced the amount of unidentified viewing.

People-powered measurement, amplified

As the media landscape grows more complex, the importance of panels has been further amplified in 2024 due to their ability to offer valuable insights into nuanced audience behaviours. Uniquely, panels can accurately distinguish between people, their households, accounts and devices. This level of detail is crucial for tailoring content and ads to resonate more effectively with specific audiences, as well as understanding audiences beyond a single platform.

At a time when some reported metrics overlook co-viewing, audience measurement panels provide the ground truth for reach and impact by

reporting multiple viewers accurately. This makes them indispensable to understand not just what is being watched across the wider content and advertising system, but who is watching and how often.

Moreover, panels have proven vital in the era of big data, helping to calibrate large data sets, turning devices into people, de-duplicating usage and training the models that combine different sources of data correctly. While big data provides a broad but often incomplete view of audience behaviour, panels offer a more precise snapshot from a representative group. By integrating large-scale with panel data, discrepancies can be identified and corrected, ensuring the broader data more accurately reflects the entire population.

Synthetic data

Synthetic data refers to artificially generated information that is modelled from real-world data. This type of data is created through algorithms and allows for accurate, privacy-safe data exchange testing by using panels as a calibration source.

While synthetic data is only as effective as the quality of the real data it uses, this approach is proving effective in tackling the challenges of fragmented audiences across devices and platforms. It enables secure integration of large data sets from publishers and media groups into a cohesive system for cross-media audience measurement.

By leveraging the power of different large-scale data sources – such as operator, platform and other device-level data – synthetic data is an approach that can enable insights while maintaining privacy.

As media companies navigate a landscape marked by data regulation and complex audience behaviour, synthetic data provides a privacy-focused option for more comprehensive audience measurement. This shift highlights the industry’s move towards more reliable and scalable methods of understanding media consumption – and while the approach is currently confined to only a few markets, it’s expected to gain traction.

Cross-media measurement drives value for advertisers

Cross-media measurement is a crucial tool, long called for by advertisers looking to assess the effectiveness of campaigns across various media channels.

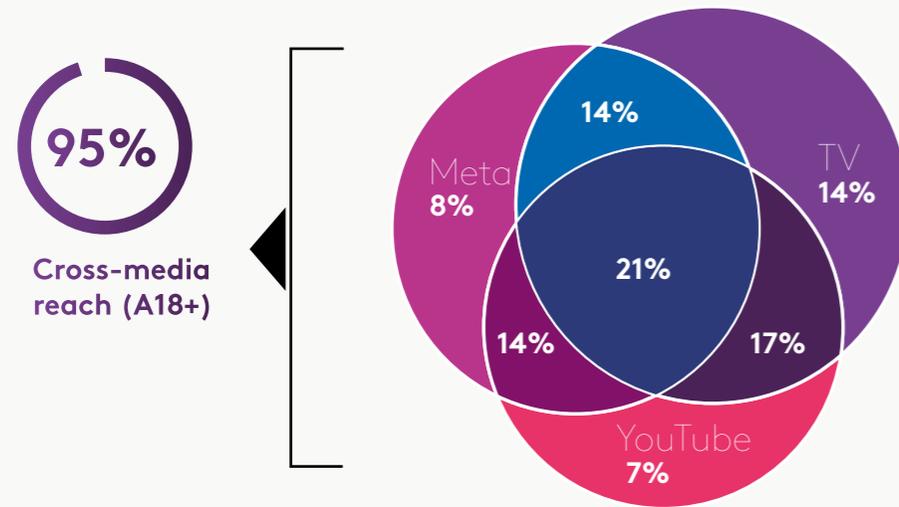
In Latin America, for example, Kantar Media has been providing de-duplicated reach data for several years, ensuring advertisers do not count the same individual multiple times across different platforms.

Meanwhile, in the UK the advertiser-led Origin service commenced with beta trials in 2024 ahead of an official roll-out in 2025. Its US counterpart, Aquila, led by the Association of National Advertisers (ANA), is making progress as it works with partners, including Kantar Media and Accenture, to realise this ambition.⁵³

Cross-media measurement allows brands like Unilever and P&G to understand audience engagement across platforms and media, improving their ability to track reach and frequency, and optimise campaigns for better brand awareness and consideration.



How distinct channels drive strong cross-media impact



Source: Bancolombia 'La Cuenta del Mar' campaign via Kantar Media Campaign Audience Validation



The chart illustrates Colombian bank Bancolombia's successful cross-media reach strategy in a sustainability-focused brand campaign, achieving extensive reach across television, YouTube, and Meta with significant audience overlap.

By using Kantar Media's Campaign Audience Validation solution, the Bancolombia media team were able to track the de-duplicated reach of their campaign and optimise their budget in flight. This approach delivered a 95% total cross-media reach and strengthened the brand's association with sustainability, exceeding initial goals in both reach and positive perception.

Regulatory shifts impact audience measurement for the first time

A package of new European Union laws signalled significant regulatory changes for the media landscape in 2024, including a new formal definition under law for audience measurement, reflecting ever greater transparency and accountability. The introduction of the European Media Freedom Act (EMFA) will have an impact beyond audience measurement, influencing how media organisations approach transparency, data access, and collaboration.⁵⁴

This regulatory push aligns with the industry's move towards data clean rooms – tools that protect consumer privacy while allowing advertisers and media companies to work with aggregated data.



What's next in 2025?

The measurement narrative beyond advertising

Audience measurement has always served multiple purposes beyond advertising, supporting a wide range of industry needs that include content valuation, rights negotiations, and distribution decisions. While recent initiatives, like those by the World Federation of Advertisers (WFA), have drawn heightened attention to the advertising applications of measurement, it's essential to maintain a broader perspective. Reliable measurement systems cater to varied drivers within the media landscape – such as content performance, attracting and retaining subscribers, and audience engagement – which remain critical irrespective of advertising trends.

The current focus on advertising metrics should not overshadow these other functions. Audience measurement enables businesses to make strategic choices beyond ad optimisation, including content investment decisions and audience engagement analysis. The Coalition for Innovative Media Measurement (CIMM), for example, is actively highlighting the importance of measuring content performance, a reminder of measurement's far-reaching implications.⁵⁵

In 2025, expect businesses to increasingly seek an understanding of the impact of every consumer touchpoint, from initial exposure to long-term engagement. Market mix modelling, attribution, and customer journey analytics are also advancing, allowing brands to grasp the comprehensive role each channel plays. As a result, audience measurement continues to refine strategies, boost engagement, and amplify returns across the entire marketing and media ecosystem.

Collaborative measurement models accelerate global adoption

Driven by the rising complexity of the media landscape and the need for accurate data – whether cross-platform or cross-media – a collaborative approach will only accelerate globally in 2025, offering a more holistic view of media consumption.

Advertisers will increasingly seek unified approaches to measure audience reach and engagement across media. Federated, collaborative models – already backed by industry bodies including the WFA and its respective national associations – unlock new paradigms in cross-media measurement. Moreover, by pooling resources, organisations can invest in advanced privacy-enhancing technologies and shared innovations, providing a more holistic view of media consumption that benefits everyone.⁵⁶

Synthetic data joins the mainstream, but transparency remains an issue

As synthetic data continues to gain traction, 2025 is set to witness deeper experimentation and adoption. The trend towards privacy compliance and technological advancements will drive its evaluation in areas like ad targeting, campaign optimisation, and attribution modelling. Meanwhile, stricter data regulations will make synthetic data an appealing, privacy compliant option, while improvements in generation algorithms will enhance data accuracy, easing concerns about authenticity.

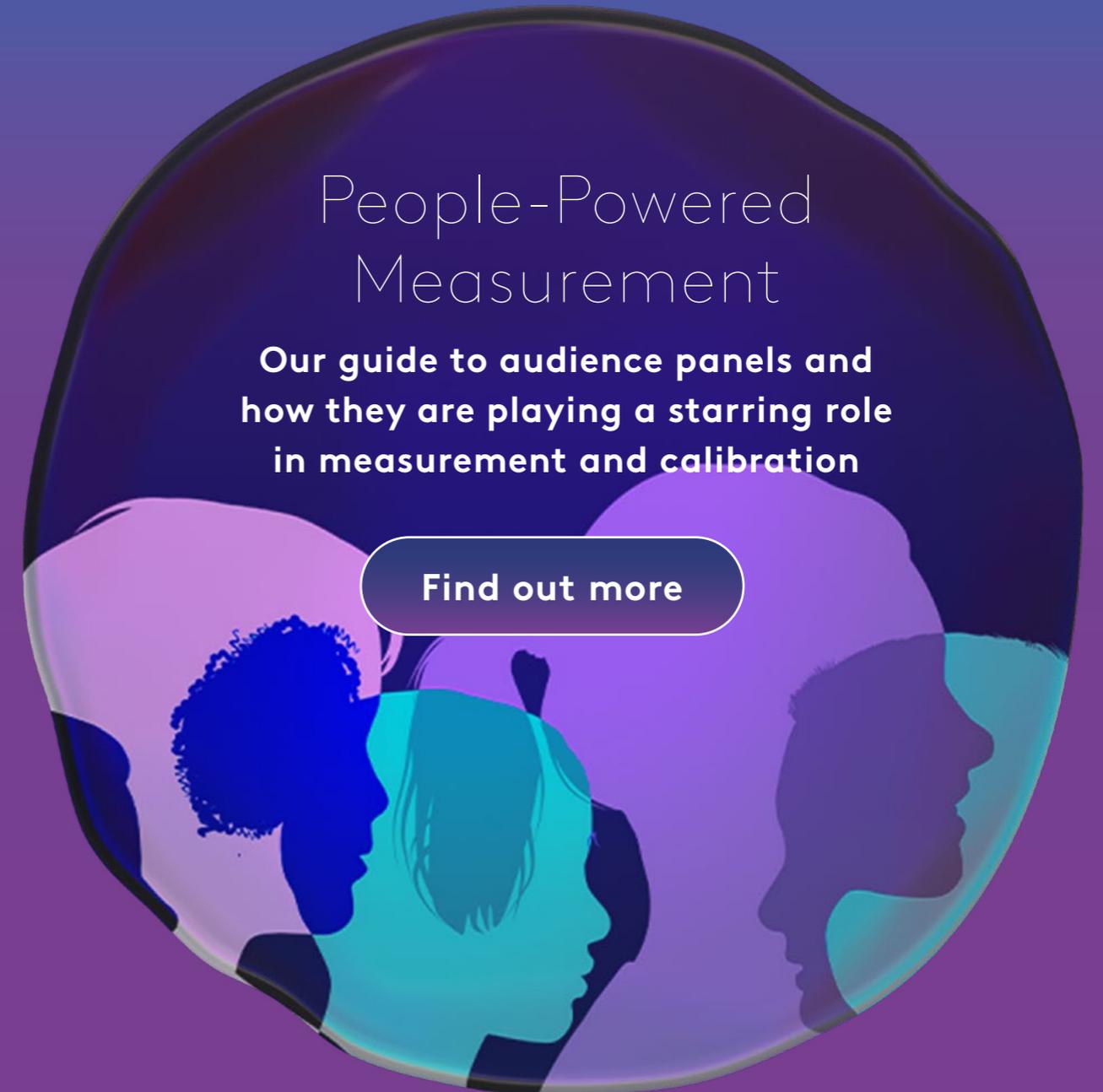
However, challenges will remain. Ensuring synthetic data mirrors real-world behaviour will be crucial, and organisations must communicate transparently about its use. Integrating synthetic data with existing systems will also pose technical hurdles.

Regulatory impact

If 2024 was the year the media industry worked out the practical implications of regulatory compliances such as the EMFA, then 2025 will be the year the sector understands its impact on the measurement ecosystem – and the implications for other regions.

The creation of national regulatory authorities, codes of conduct, and a central European Board for Media Services will help standardise audience measurement across the EU, ensuring that data transparency remains a top priority.

Given the EU's influence on global regulations, it's also likely that other regions will follow suit in implementing similar measures to ensure transparency and accountability in audience measurement.



People and skills

Future-proofing the
media ecosystem

**A demand for new skills, diverse perspectives
and more openness is reshaping the media
workforce, driving companies to rethink
current strategies**

2024 Trends

Adapting to a changing media ecosystem

2024 proved to be a critical year for the media industry, as the rapid interest in artificial intelligence (AI) and the growing complexity of data impacted its talent pool. According to a global survey by Kantar Media, 72% of industry professionals believe their organisations must now 'significantly' reshape their skill sets to stay competitive.⁵⁷

The media landscape is certainly evolving at an accelerated pace. Whether driven by big data, automation, generative AI, or any other innovation, what can work one day may not be effective the next. Consequently, organisations have been seeking strategies to hire and retain talent capable of adapting to and driving change, challenging the status quo, and bringing fresh perspectives on the future of media and measurement.

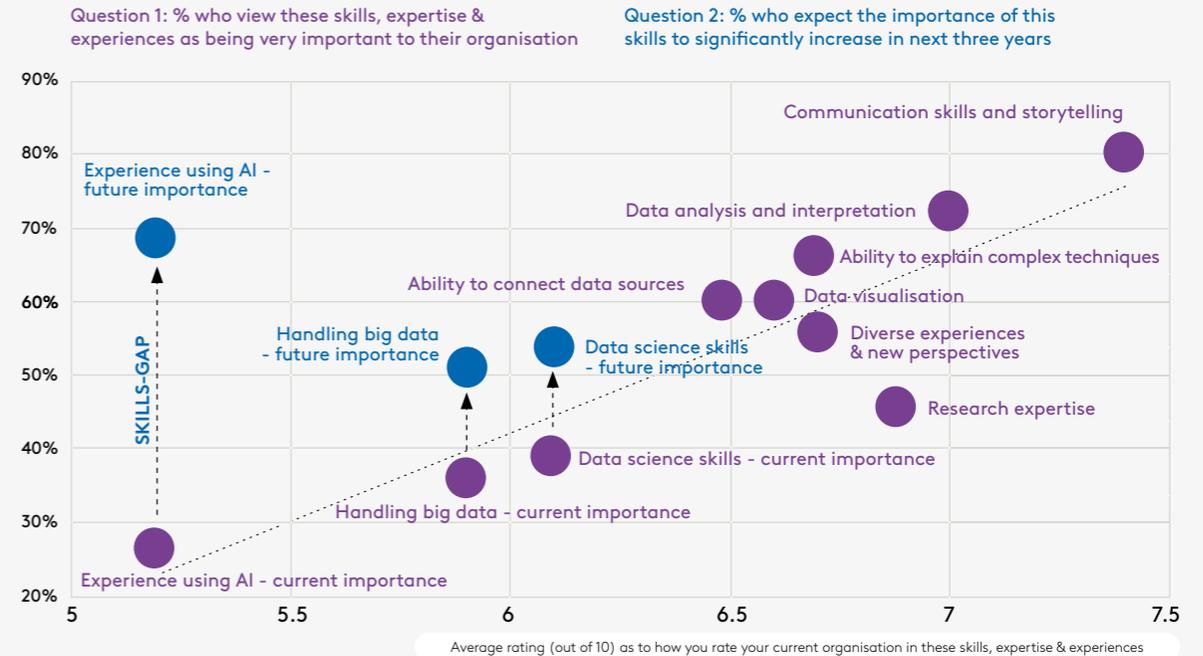
However, while many media organisations report that they're managing well with their current talent strategies, they do anticipate a significant skills gap when it comes to AI. Nearly half of respondents (49%) say AI is already having a substantial impact on their operations, and 74% believe AI skills will be essential for future recruits.

New ideas, new recruits

It became clear throughout 2024 that the media sector required a shift in recruitment strategy to future-proof itself in a world undergoing significant transformation. Businesses increasingly focused on hiring talent from outside the industry to inject fresh perspectives and foster innovation – particularly as they leveraged the abundance of data for new product development. Indeed, 90% of media leaders across the globe say they want recruits who can challenge current strategies, underscoring the need for fresh approaches to problem-solving.

Yet 70% of media leaders also believed more work was needed to attract talent from diverse backgrounds. With other sectors competing for similar roles, especially in data science, this has become a top priority – as has ensuring existing talent is happy and fulfilled enough to stay in the sector, which also means considering broader motivations, such as work culture, salary, growth opportunities, and the chance to work on diverse and interesting challenges.⁵⁸

How would you rate your organisation in terms of the skillsets it has available to it in those areas?



Source: Kantar Media's 2024 Global Media Leaders Survey
 Question 1: How would you rate your organisation in terms of the skillsets it has available to it in those areas?
 Question 2: How do you anticipate the importance of these skills changing over the next three years?
 Base: Important Skills, Expertise or Experiences selected for the respondent's organisation. Min (1,000 per skill)



When we plot skills against ratings of current capabilities, we can see how organisations in our Global Media Leaders Survey think they are largely performing best against current priorities (in purple). If we overlay the skills most likely to significantly increase in importance (in blue), we can identify skills gaps relative to current capabilities.



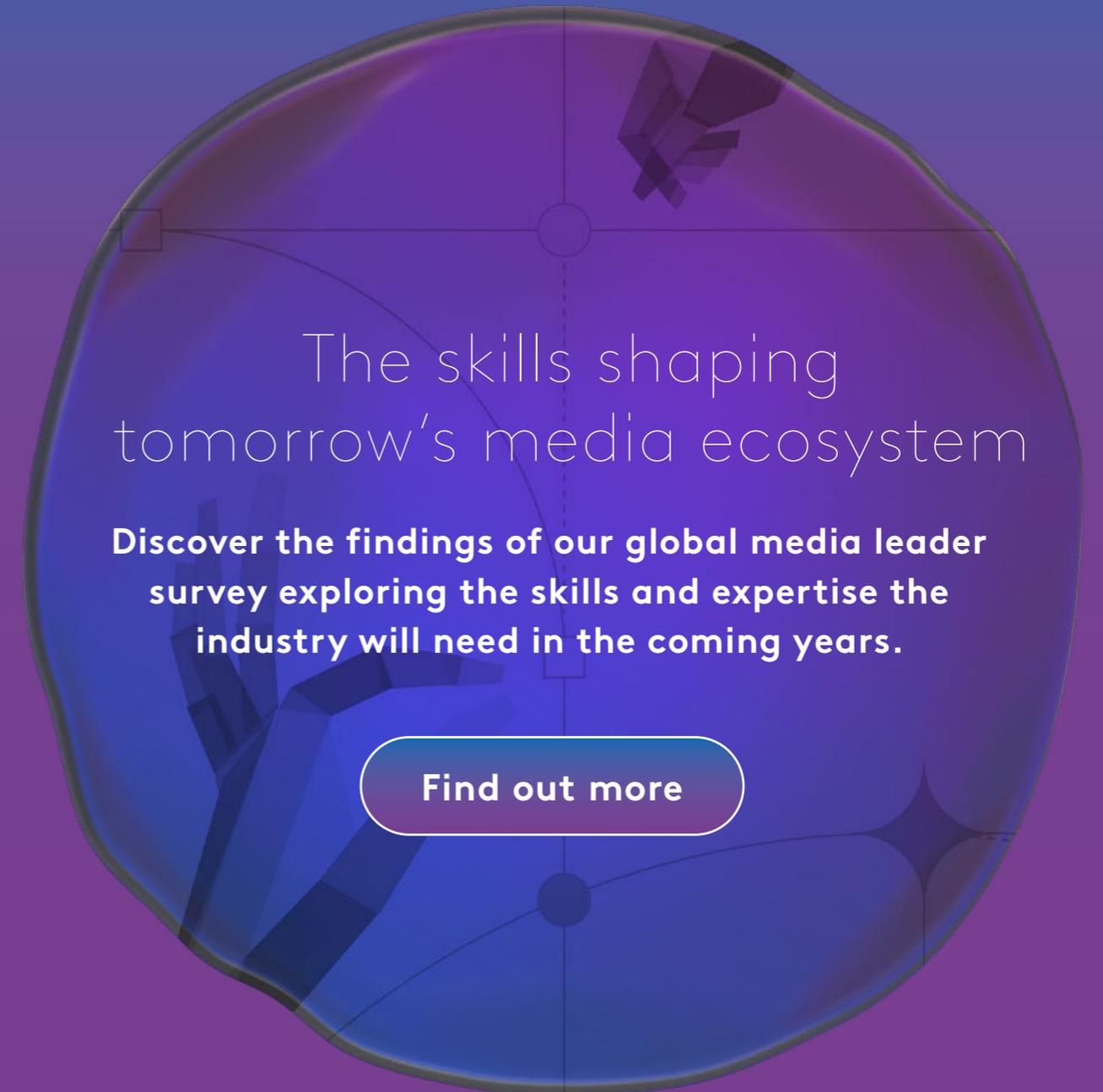
Collaboration proves its worth

Collaboration has become a critical driver of success in the media industry, with openness to partnerships now, more than ever, essential to unlock opportunity. As the landscape evolves, media groups are leveraging the value of working together, both within their own teams and across the industry.

Initiatives like CFlight – originally pioneered by Comcast in the US, expanded by Sky and UK broadcasters, and now overseen by Barb – exemplify this approach. Indeed, these efforts benefit not only individual companies, but strengthen the media ecosystem as a whole. Internally, fostering collaboration across departments is also seen as key to unlocking creative solutions and integrating data-driven insights.

As AI and other technologies rapidly reshape the industry, collaboration is seen as vital in keeping pace with change and delivering innovative results. Indeed, a culture of openness, where teams are encouraged to continually learn and adapt, is helping to ensure organisations remain agile and competitive.

Moreover, reducing unconscious bias in recruitment – something 70% of businesses feel the media industry has a problem with according to Kantar Media’s global skills survey – is crucial to fostering diversity of thought and innovation, with collaborative environments ensuring the full potential of varied perspectives is realised.⁵⁹



What's next in 2025?

Future-proofing data science teams

In 2025, the most forward-thinking businesses will view data science not only as a data enabler, but as a strategic pillar. As the role of data scientists evolves, businesses will focus on building and developing teams so they are continuously technically adept, while also equipped with specialised skills such as data visualisation, coding, and strategy.

With AI, large language models (LLMs), machine learning, and big data providing more opportunities to fuel decision-making, continuous skill development and investment in training will also be critical to stay ahead of technological advancements and industry needs.

Furthermore, the future of data science teams will hinge not just on growing technical expertise, but also on fostering collaboration across departments. Companies will benefit from creating diverse teams where each member brings a unique skill set, enhancing their ability to drive innovation. This will require data scientists to work closely with non-technical teams, ensuring that insights align with business goals and can be acted upon effectively.

Meanwhile, to attract and retain top talent, forward-thinking organisations will prioritise flexible learning opportunities, external training and certifications, and a work environment that keeps data scientists engaged. A culture of data literacy across the organisation will also be key, enabling all teams to collaborate meaningfully with data scientists and maximise the value of data-driven insights.

The expanding role of storytelling

Storytelling has long been a crucial skill for the media industry – it's largely its reason for existing, after all – but internally it will take on a renewed focus for the sector in 2025 as businesses face the challenge of making sense of an increasing volume of complex data.

While data will always provide a necessary foundation for any business decision, it's through storytelling that numbers can be turned into meaningful insights that resonate emotionally with their audiences, more effectively communicating value, ideas and vision.

And as data sets grow and come from ever more diverse sources, the ability to craft compelling narratives becomes essential for making data understandable and impactful – whether communicating with clients or the C-suite.

Furthermore, in today's media environment, storytelling has the power to unify disparate data points into cohesive, digestible narratives. While different data sets might tell you different things about audience behaviour, storytelling goes further by revealing who these people are, what motivates them, and why their behaviours matter to advertisers.

And while AI may assist in processing data in future, the human skill of weaving these insights into relatable narratives will remain irreplaceable – which is why data scientists will also need to add storytelling to their skill sets, just as natural creatives and communicators will need to become more data literate.



Openness will strengthen the media ecosystem

Looking ahead to 2025, openness – both at the individual and organisational levels – will continue to be key to the ecosystem's success. Media organisations will thrive by embracing fresh talent from other industries and non-traditional talent pools, as leaders increasingly recognise the value of diversity. This openness will foster innovation, enabling companies to better navigate transformative technologies like AI by blending diverse skills and perspectives.

Openness to disruption will be just as critical. With industry leaders acknowledging the need for individuals who challenge conventional strategies, the most successful media companies will be those that are flexible, combining creativity with data-driven insights to stay ahead in a rapidly evolving landscape.

Promoting a culture of openness and continuous learning within organisations will also be essential to maintain competitiveness. Equally important is ensuring that young people, who will shape the future, have a voice today – especially at the strategic level. Better representation of youth in decision-making processes will ensure that the media industry evolves in ways that reflect the priorities and expectations of future generations.

As Evan Shapiro, professor of media and entertainment at New York University, points out, the majority of the US population is under 40, so organisations need to ensure younger voices – as well as those from varied economic backgrounds – are part of strategic decisions. And if organisations aren't open to such an idea? Well, ask Blockbuster and MySpace.⁶⁰

A **people-powered** future

As this report has emphasised, beneath all the talk of technology, data, and disruption, the future of media will be shaped not just by innovations but by the people who create, interpret, and use them.

The most complex challenges ahead – a crisis of confidence, shifting business models, and tighter regulations – are significant, but by focusing on people at every level, these challenges can be overcome.

We must never lose sight of the fact that the sector's most valuable resource remains its workforce, whose creativity, insights, and adaptability will drive the next phase of industry growth. Whether harnessing AI, utilising data analytics, or developing new and engaging content, it is people – supported by technology – who will build a more resilient, confident future.

Equally essential is the media industry's ability to understand and engage its audiences. As consumption habits evolve, those who can truly grasp changing audience behaviours will be better equipped to deliver meaningful content and experiences. This deeper understanding, underpinned by real-world, people-based measurement and acted upon by skilled professionals, will be crucial in shaping the strategies that will overcome current challenges.

The path ahead may be complex, but with a truly people-first approach, the media industry will grow stronger, more adaptable, and better aligned with the needs of the growing audiences that are the lifeblood of our industry.

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