2024
MEDIA TRENDS&
PREDICTIONS
KANTAR MEDIA

FOREWORD

As the newly appointed Global CEO of Kantar Media, it's a pleasure to transition from an external reader of the annual Media Trends and Predictions report to a member of the team proudly producing it. And what a time to do so.

We find ourselves at an inflection point in our industry, marked by political and economic uncertainties, shifts in consumer behaviour, and accelerated technological advancements.

Guided by my core belief that insight delivers foresight, I am certain that we can empower businesses not only to adapt to these changes but to anticipate and navigate them proactively.

We live in an era where data is plentiful, almost overwhelmingly so. But it's not just the volume of data that matters; it's how effectively we harness it to make meaningful and timely decisions. As a business, we remain steadfast in our role serving the content and advertising ecosystems, investing heavily in new technologies and strategies to unlock more value from their investments.

In this year's report, our aim is to provide a balanced mix of practical optimism and well-defined strategies. It's all part of our commitment to helping our clients navigate the complexities of the evolving media and entertainment landscape and to sharing the right insights to help you take on the challenges 2024 will present.

Patrick Béhar
Global CEO
Kantar Media

EDITOR'S NOTE

Informed by our data and insights, the 2024 Media Trends and Predictions report illuminates the myriad opportunities and challenges confronting the content and advertising ecosystems across the globe.

This year, our focus revolves around five themes:

- Macroeconomics, micro media strategy
- Content goes back to the future – and around the world
- Advertising in the eye of a storm
- Technology: gamechangers and false dawns
- Strengthening the signal: audiences in high definition

Within each of these themes, our experts distil the key trends from 2023, while offering forecasts for 2024. Additionally, each section concludes with a viewpoint from some of our most senior thought leaders.

At the core of our mission lies the ambition to understand audiences and help businesses unlock growth. This report aims to support this objective by providing a unified and comprehensive view of a media environment in flux.

We trust that the report's foundation in data and evidence will reassure readers that the predictions we have uncovered are a reliable forecast and will prove particularly valuable in a period marked by significant shifts.

John McCarthy
Chief Marketing Officer
Kantar Media

WHAT'S NEXT IN 2024?

MACROECONOMICS, MICRO MEDIA STRATEGY

Markets are experiencing rapid shifts in economic indicators, but their effects aren't uniform – who are the economic winners, and what are the impacts on media consumption?

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Evolving audience preferences and shifts in content consumption, intertwined with the industry's push to monetise and measure, highlight a market undergoing dynamic transformation.

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ADVERTISING IN THE EYE OF A STORM

At no other point have brands faced so many unique challenges all at once. Only insight and adaptation can help them navigate such turbulent times.

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TECHNOLOGY: GAMECHANGERS AND FALSE DAWNS

Dive deep into a year of incredible advances, cautionary tales, and the balance of technology's promise against its potential perils.

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STRENGTHENING THE SIGNAL: AUDIENCES IN HIGH DEFINITION

By adopting more advanced strategies, businesses are supercharging their data and enriching their understanding of audiences - but it's not without challenges...

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MACROECONOMICS, MICRO MEDIA STRATEGY

Markets are experiencing rapid shifts in economic indicators, but their effects aren't uniform – who are the economic winners, and what are the impacts on media consumption?

2023 TRENDS

Inflationary pressures continue – but with nuanced effects

The backdrop of 2023 was defined by continued economic troubles, with inflationary pressures persisting, albeit with nuanced effects.

The International Monetary Fund (IMF) indicated a tempering of global growth, projecting a reduction from an estimated 3.5% in 2022 down to 3.0% for both 2023 and 2024[1]. Notably, while the 2023 forecast surpassed the initial projections detailed in the April 2023 World Economic Outlook (WEO), it remains low in comparison to historical benchmarks[2].

However, advertising revenue growth is reasonably stable. GroupM estimates that growth will remain unchanged from its December 2022 forecast at 5.9% – which it describes as positive in nominal terms, but negative after adjusting for inflation[3].

It's crucial, however, to recognise that macroeconomic trends have not affected all markets equally. Developed nations, such as the US and in Europe, are experiencing widening wealth gaps, and individual purchasing behaviours aren't universally reacting in the same way.

In the UK, where inflation has been stubbornly high, our latest TGI data[4] shows there has been a decline in all adults who say that they're happy with their standard of living (-9% in the last 12 months).

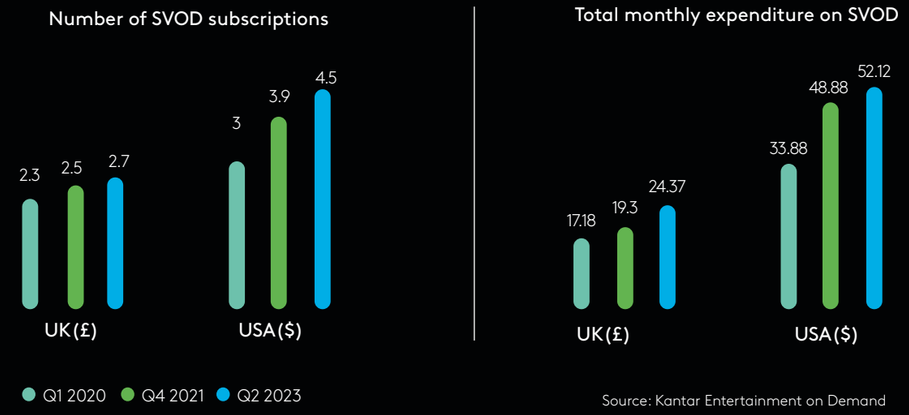
There's also a disparity among UK consumers by income level – with 62% of those among the top 10% of earners saying they're happy with their living standards, compared with just 35% among the lowest income cohort.

Inflation suppresses media subscription appetites

Despite 2023's economic shifts, many video-on-demand (VOD) platforms have continued to increase subscription prices[5] – and this trend is expected to continue, according to Kantar's Entertainment on Demand data[6].

At the same time, the percentage of consumers cancelling their subscriptions has also increased. In the UK market, for example, subscription video-on-demand (SVOD) cancellations stood at 9.9% in the second quarter of 2022, but by Q3 2023 that figure had risen to 14.2%. It's a similar picture in other regions.

Inflation impacts on subscription video-on-demand (SVOD) services



Source: Kantar Entertainment on Demand

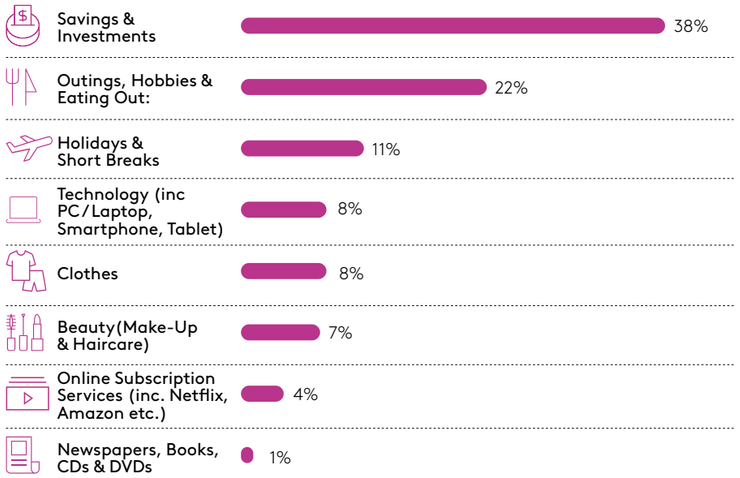
Outside any given market, data sheds light on global trends into how connected consumers might juggle their spending priorities in light of unexpected costs. When asked what they would prioritise if forced to select just one area to spend on, according to data from our TGI Global Quick View[7] (a harmonised survey of online consumers from 35 markets), 38% chose to prioritise their funds towards savings and investments.

Leisure activities such as outings, hobbies, and dining out were preferred by 22%, followed by holidays and short breaks at 11%.Technology purchases and clothing both scored 8%.

In contrast, online subscription services, encompassing the likes of Amazon and Netflix, stood at 4%, suggesting that media subscriptions could be among the first luxuries re-considered during inflationary pressures. The data shows, however, that the markets where connected consumers are most likely to agree to prioritise spending on online subscriptions are Great Britain, Brazil and the US – with China, Taiwan and Indonesia the least likely – further suggesting that rates of subscriber churn will differ by market.

How consumers prioritise their spending in a crisis

Q. "If an unexpected expense occurred, which of the following would you prioritise if you could only select one?" By %



Source: Kantar Media TGI Global Quick View 2023
Base: 78,142 Connected Consumers aged 16-65, 35 Markets Globally

Media consumption differs by market

Recent analysis of viewing patterns across a selection of markets heighten just how much viewing behaviours differ region by region[8].

For example, factors such as seasonal events can cause variations in viewership – Brazil sees consistent viewing patterns perhaps due to its stable climate, while countries like Norway and the UK have pronounced seasonal shifts. Regional preferences also dictate the balance between linear and non-linear viewing, with significant differences observed across markets. Paid versus free video-on-demand (VOD) preferences also vary regionally, influenced by major platforms like Netflix and Disney+.

Cultural values also affect content preferences, emphasising the need for market-influenced advertising strategies. Recognising these regional nuances and enhancing audience measurement systems are now important to ensure that effective strategies can continue to be crafted.

Media business models keep evolving

In an economic landscape marked by uncertainty, media businesses are in a constant state of evolution. The once-clear divide between subscription-based and ad-driven VOD services has firmly blurred, with platforms not just providing content, but also tailoring it to meet specific audience preferences.

A key strategy emerging from this evolution is native VOD platforms guiding audiences towards more affordable, ad-supported options. Evidence also suggests that these models could generate higher total revenue per user, enhancing profitability for streaming platforms.

This shift towards ad-supported streaming broadens choices for audiences and opens new revenue streams for platforms. Meanwhile, broadcasters and networks, with their long-standing expertise in advertising, may find it easier to incorporate and sell ads than those for whom advertising is a new specialism.

Yet, there are voices of caution. Some industry experts are sceptical and raise concerns about the trend of pricing ad-supported tiers comparably to their original ad-free counterparts[9].

WHAT'S NEXT IN 2024?

VOD's success will be uneven

As inflation recedes, markets will stabilise, and for streaming platforms that signifies a recalibrated mix of subscriptions and ad-funded options. However, the dominance of ad-driven models won't be consistent across all regions. Over the past three years, as the likes of Netflix and Disney+ have boosted their range of subscription plans, our TGI data reveals important shifts in audiences' attitudes to both paid and ad-supported video-on-demand (VOD) services[10].

In Denmark, Norway, Sweden, Spain, and the UK, connected consumers seem more inclined to opt for paid VOD services. This could suggest a cultural preference or habit for subscription-based models in these markets. On the other hand, consumers in Taiwan, Egypt, Japan, Hong Kong, and Thailand appear to have a greater preference for free ad-supported VOD services. This contrast might indicate different consumer behaviours and attitudes towards payment models in these regions[11].

In 2024, platforms seeking growth will need to continue to factor in regional nuances and find pricing strategies to match subscriber preferences.

Deeper regional insights will dictate global strategies

For streaming businesses to truly thrive, surface-level knowledge won't suffice. In 2024 and beyond, they need to delve deeper, understanding their audiences' attitudes and actual viewing habits – both within and beyond the confines of their own platform. This will involve not just understanding what content resonates, but also how it should be priced and the most effective ways to market it.

In essence, global success in the streaming domain demands a localised strategy. Companies need to mould their offerings – from content curation to pricing to promotional tactics – to fit the distinctive features of each region's landscape. Only then can they hope to capture the diverse and multifaceted global audience[12].

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Segmentation will redefine audience targeting

Amid widening wealth gaps in developed nations, advertisers will place greater emphasis on segmentation, given the varying impacts of macroeconomic trends on consumer segments.

Certainly a continuation of the cost-of-living crisis, even if it's less severe, means demographics alone won't suffice. Instead, a deeper understanding of specific audience behaviours and preferences will be paramount, making enhanced segmentation indispensable[13].

A deeper understanding of specific audience behaviours and preferences will be paramount.

Consumer media loyalty will be tested

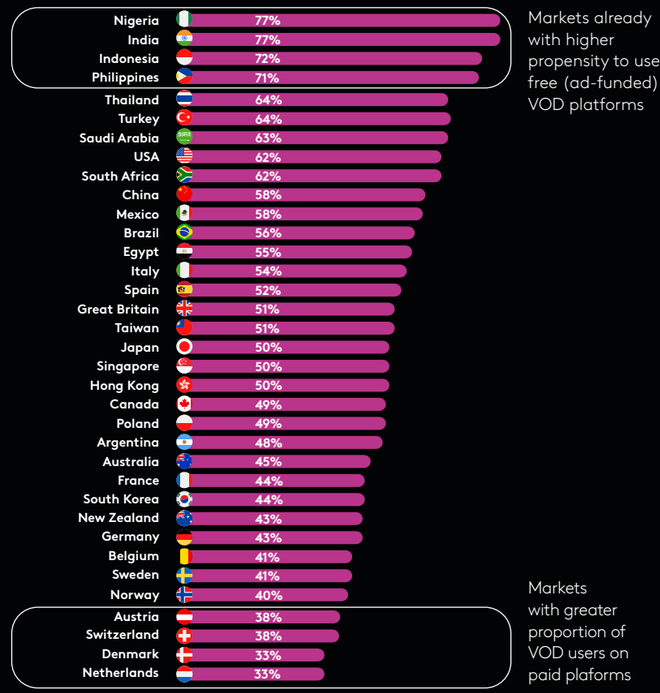
As budgetary constraints continue to squeeze disposable income, brand loyalty will be tested, and companies offering the best quality content and value for money will have even greater importance.

A mixture of increased costs, new competition and a deluge of content choices are prompting people to cancel lesser-used services. Audiences are becoming more discerning in their content choices, which leads to churn as they switch to platforms that better suit their preferences.

To address these challenges, streaming businesses will need to adapt. Strategies could include offering exclusive content to give subscribers a unique reason to stay, discounting to relieve financial pressure, or facilitating easier subscription management.[14]

Attitudes to ad-funded models

Q: *"I would be happy to put up with adverts if my TV/video streaming subscription was cheaper"*



Source: Kantar Media TGI Global Quick View 2023
Base: 86,766 Connected Consumers aged 16-65, 35 Markets Globally

VIEWPOINT

BUSINESSES WILL NEED A COMPLETE PICTURE FOR 2024

Louise Ainsworth
CEO - EMEA
Kantar Media

In the modern business landscape, where data is at our fingertips and change is all around us, companies are constantly presented with a dichotomy: aligning strategies with overarching, macro trends while ensuring the granularity of understanding at the micro level.

Big picture trends serve as compasses, providing a general orientation to deal with market dynamics. They spotlight emerging patterns and frame collective movements. However, a solely macro-focused lens, particularly in media and marketing strategies, risks glossing over important and more nuanced behaviours and preferences.

Within standard demographic brackets, for example, there exist a variety of life experiences, values and behaviours. And while high inflation may be a macro trend, its ripple effects on individual households can differ vastly. One family might cut back on luxuries, while another may recalibrate essential spending, and yet another might find innovative ways to supplement their income.

> Macro insights remain valuable for direction, but must be combined with nuanced customer insights for impactful strategies

Such variations reiterate the fact that the cost-of-living crisis, and indeed any other macro trend, does not have uniform implications. Hence, a marketing strategy that assumes homogeneity, might not always be the best solution.

It's a principle we can apply to other areas of the media landscape too. For example, although content tastes may be broadly similar across different regions, what really resonates with viewers in North America might not necessarily strike the same chord with audiences in Asia or Africa.

Cultural nuances, regional events, economic disparities, and local histories are all key factors in shaping media consumption behaviours – even the weather and changing seasons can play a role. A global strategy without regional insights navigates treacherous waters without a map.

To succeed in 2024 through truly engaging audiences, businesses must delve deeper beyond surface-level macro trends. The current climate necessitates understanding complex forces that impact audience behaviours, attitudes and values. Macro insights remain valuable for direction, but must be combined with nuanced customer insights for impactful strategies. The key is balancing the macro and the micro. With this approach, businesses can craft resonant strategies amidst an interconnected yet challenging world.

CONTENT GOES BACK TO THE FUTURE - AND AROUND THE WORLD

Evolving audience preferences and shifts in content consumption, intertwined with the industry's push to monetise and measure, highlight a market undergoing dynamic transformation.

2023 TRENDS

From a strike to evergreen thinking

2023 will be remembered as an important year for the entertainment industry. A major disruption came in the form of the Hollywood writers' and actors' strike, born out of debates over fair residuals from distributors, and concerns about the potential use of artificial intelligence in scriptwriting and production, amongst other issues.

The impasse, although resolved for writers towards the end of the year, led to a lengthy halt in the production of new TV shows and films in the US and is symptomatic of an industry in flux.

It also gave pause to consider an interesting question – should content strategies always be about creating something new? Timeless classics like Friends and The Office US continue to capture audiences, be it through linear broadcast or on-demand. Meanwhile, archive franchise content – including Pixar, Marvel, James Bond and Lucasfilm – is being given a new life as the bedrock of themed FAST ad-supported streaming channels[15].

The persistent appeal of such content potentially signals the direction of travel for media owners: tapping into the powerful draw of evergreen nostalgia to chart their future course.

Commissioning new content is becoming riskier

In 2023, the success of various streaming shows highlighted the unpredictable nature of content production, with smaller-budget shows often achieving similar, if not greater, traction than higher-budget, higher-profile commissions. This indicates that there's no single formula for creating successful content in the streaming world[16].

Adapting to this precarious landscape, platforms are strategically spreading their bets, curating diverse content line-ups. This will accelerate the trend towards global VOD platforms commissioning non-US drama content as they look for the next Squid Game. Certainly there is a growing appetite for non-English language content, with Netflix's own figures showing a 90% increase over the last three years[17].

Yet, even with all the right ingredients, there's no guaranteed recipe for success. For example, Apple's critically acclaimed, high-budget shows are not necessarily leading to platform loyalty and subscriptions[18].

Cinema returns - with some unlikely help

After enduring prolonged closures during the pandemic, audiences are once again returning to cinemas. Major blockbuster releases, such as Top Gun: Maverick, Barbie and Oppenheimer have played a key role here in reigniting audiences' passion for the big screen[19]. However, the atmosphere is another audience draw, enhanced with the advent of state-of-the-art technologies like IMAX and Dolby Atmos, which have transformed movie-watching into a truly awe-inspiring experience.

Meanwhile, the gaming world is blurring the lines between play and cinema. Giants in the space, such as Fortnite and Roblox, now host movie screenings and other cinematic events, merging the worlds of gaming and film in unprecedented ways. At the same time, Netflix continues to invest in games development as the next chapter in its growth strategy[20].

This growth of viewing opportunities is beneficial for content owners and distributors. Not only do they have more channels to reach audiences, but they also have the potential for increased revenue streams.

There's no single formula for creating successful content in the streaming world.

The ‘shape’ of audience viewing varies according to the windowing strategy

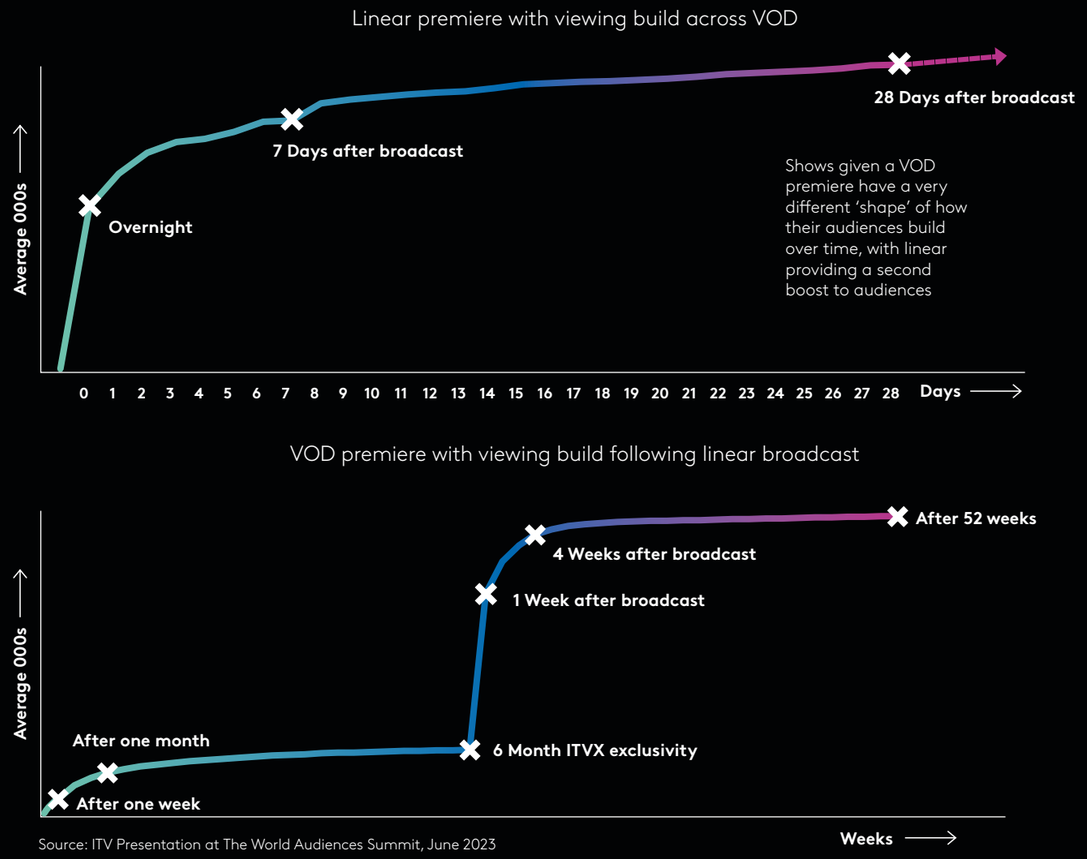
As the nuances of streaming habits are dissected in greater detail, 2023 saw further development in how streaming platforms analyse viewer habits. In addition to overnight or TV audience ratings within a given broadcast window, broadcasters and streamers alike are using more data metrics to understand viewing behaviours such as 'completion rates'. This isn't just a minor adjustment, it signifies recognition that the myriad ways we understand and report viewing behaviours are expanding as a more wholesale approach to windowing becomes the norm.

For example, UK broadcaster ITV’s early insights have found that a series which premiered on ITVX has a distinct 'shape' in its audience accumulation. However, rather than a single peak in viewership, there's early evidence of an initial surge from viewing on-demand, followed by a second boost when the show airs on linear channels.

Elsewhere, there’s also evidence that long-lived procedural shows, such as Blue Bloods, are able to defy the streaming trend towards shorter runs for binge-worthy series[21]. In contrast, these shows see their demand grow with each successive season. This defies recent wisdom, underscoring the importance of having more data to understand the complexities of current and emerging viewing behaviours.

The myriad ways we understand and report viewing behaviours are expanding as a more wholesale approach to windowing becomes the norm.

The ‘shape’ of audience viewing varies according to the windowing strategy



Source: ITV Presentation at The World Audiences Summit, June 2023

WHAT'S NEXT IN 2024?

Adapting to multi-platform consumption

In 2024, it won't just be about having content available on various platforms; it will be about harnessing the power of those platforms effectively. As audiences continue to consume content across linear, streaming and different devices, the imperative will not merely be to reach them – but to understand how to measure and monetise them.

The BBC, for example, is elevating the game by fusing data from the UK's joint industry committee Barb with its own data. Using advanced data visualisations and insights it is exploring the 'total lifetime' of a given BBC series. Such innovative approaches reiterate that the future belongs to those who choose to adapt to changing viewing behaviours.

Back to the future with library content

The 2023 US production pause, caused by the writers' and actors' strike, could have a significant impact on content in 2024. It will almost certainly prompt a deeper look into domestic archives, with the goal of using existing content to fill the production gap. Additionally, the production break is likely to increase the presence of non-US content on global platforms in 2024, while unscripted content is also expected to be more prevalent due to its easier production process.

If any of these changes result in a hit show, it could change how the US thinks about archival material or global content, with much longer-lasting impacts on content in the future.

The hybrid future of live broadcasting

On-demand viewing continues to gain traction, yet the allure of linear viewing will remain strong, notably for major events like the 2024 Paris Olympics and political elections. These moments will underscore the communal magic that on-demand streaming often can't match, and will continue to deliver peak linear viewing.

Whether linear or VOD, viewers are increasingly favouring streaming for its flexibility and interactivity. In response, platforms will continue to integrate streaming, merging scheduled programmes and events with on-demand offerings across a range of platforms.

TikTok, X (formerly Twitter) and YouTube will look to reflect this trend, amplifying broadcasts and adding interactive elements. In 2024, anticipate a fusion of live and on-demand moments, harmoniously serving varied viewer preferences.

Expanding definitions of success through cross-platform data

As the media landscape evolves, so too do the parameters defining success. With the growing number of metrics available, the benchmarks for evaluating a show's success are set to adapt. Programme owners and distributors will leverage data in new ways, integrating ratings data with first-party user metrics. This fusion will enable platforms, content owners and distributors to assess the total lifespan and broader impact of their programmes.

Regional content's global appeal

In 2024, streaming businesses are predicted to focus more on localisation, as well as bringing relevant local content to global audiences, as part of their global growth strategies. The rise of streaming services like Netflix and Disney+ has amplified the global reach of regional content, from Japanese anime to Bollywood films. In addition, VOD platforms are increasingly seeking non-US content, providing unprecedented opportunities for regional productions to go global (see 'Commissioning new content is becoming riskier' p19).

As audience preferences vary across different markets – some showing high subscription loyalty while others favour ad-supported platforms – it's crucial for businesses to understand and adapt to regional viewing behaviours and content tastes. Companies that successfully tailor their strategies to these localised preferences will be best placed to attract and maintain international audiences[22].

VIEWPOINT

THE FUTURE REQUIRES HYBRID THINKING AND CO-CREATION

Antonio Wanderley
CEO - Latin America, Spain, Asia Pacific and Africa
Kantar Media

As the media world evolves, the ways in which we assess programme success is also changing. However, to evolve our measurement methods successfully, we face a series of shared challenges.

As we can see in 2023's trends (p19), there is a desire - no doubt made stronger as our skills and capabilities advance - to measure the success of content in ways that better match the multifaceted and more complex nature of today's media consumption. To achieve this, we will need to reconsider some of our existing thinking.

For example, many in the industry still think in rather binary and siloed terms: data is either first-party or third-party, and different organisations may take a unique view on the power and application of each. Yet this thinking is out-of-step with our ambitions, and we should begin to consider both elements more as sources for larger, interconnected 'data lakes' from which we can extrapolate the most powerful insights.

"

Data is not a one-size-fits-all solution; its value is best unlocked when moulded to specific business models and strategies

"

In the context of performance analysis, certainly relying solely on either third-party or first-party data isn't sufficient. Third-party metrics, while offering a broad, trusted and shared overview, lack the granularity of first-party data, and vice versa. The challenge, therefore, is to harmonise these disparate data sets.

This is complex, and to achieve it at scale even more so. Therefore, another challenge will be to ensure collaboration among different data handlers to validate and interpret the fused data efficiently. Co-creation should underpin our collective ambitions.

Get it right, however, and such advanced measurements could prove extremely useful in formulating content strategies, enabling platforms to better customise offerings for both viewers and advertisers, or better define success and failure.

Our clients have continued to be trailblazers in leading from the front; UK broadcasters like the BBC and ITV have been working with Barb to measure streaming for over a decade, Numeris in Canada is working to integrate operator data alongside existing ratings, whilst in Spain Dazn is looking at linear TV alongside its own platform data to enrich its view.

In Brazil, as viewing forms and platforms continue to expand, our Cross-Platform View tool is being used by more hybrid-VOD and video-sharing platforms to understand the proportion of time spent as a means of context and compatibility in the market. Each is evolving their use of data in ways that have helped shape the wider industry, and now, in their own unique ways, they are looking to evolve that further.

The key takeaway here is that data is not a one-size-fits-all solution; its value is best unlocked when moulded to specific business models and strategies.

Indeed, to advance how we assess the effectiveness of content, it's essential to account for the varied platforms, business models, and consumer demands of a global media market. As such, future measurement tools must be versatile enough to meet these diverse market needs, necessitating a more integrated approach.

As a measurement company, we can't address these complex issues alone. Media sellers are open to more data integration and media buyers are more strongly articulating their needs clearly. In doing so we're unlocking the full potential of advanced measurement capabilities and data-driven decision-making.

ADVERTISING IN THE EYE OF A STORM

At no other point have brands faced so many unique challenges all at once. Only insight and adaptation can help them navigate such turbulent times.

2023 TRENDS

Constant adaptation to change

2023 continued what can only be described as a period of almost relentless change, leaving the advertising landscape caught in a whirlwind of challenges. It's what some commentators describe as a perma- or poly-crisis[23]. And for good reason. Almost every facet of our world today – technological, cultural, economic, political and environmental – is in a state of flux[24]. And as a pandemic, war and an AI revolution demonstrate, sometimes change can arrive with little warning.

Such fast-paced volatility requires adaptability within both the broader business and advertising sectors. The way forward for brands hinges on their ability to harness data and insight, ensuring they keep pace with – or even predict – shifting trends and challenges.

Cultural contexts: the key to deeper connections

In the midst of these challenges, understanding cultural context has emerged as a crucial skill for brands. By understanding and integrating these contexts, brands can forge deeper, more meaningful relationships with their audiences[25].

AVOD delivers cost-effective solutions

Under 2023's challenging conditions, advertising video-on-demand (AVOD) platforms - both native and broadcaster - continue to demonstrate value as a flexible and cost-effective option for advertisers, while also serving as a fresh revenue source for platforms and networks. As linear television advertising continues to operate at a premium, and in some regions with high inflation[26], AVOD certainly offers a budget-friendly alternative. Notably, it also allows for precise audience targeting, enhancing the overall efficiency of advertising budgets[27].

The consumer base for AVOD is also expanding as former subscription-only platforms – including Netflix, Disney+ and, from next year, Amazon Prime – evolve their offerings and open up new inventory[28]. To cap it all, AVOD aligns well with contemporary viewing habits, offering a multi-device experience, while mitigating some persistent challenges like ad-blocking, as ads are typically integrated within the content stream itself.

The rise of brand activism - and its backlash

Post-pandemic, and in the midst of environmental and social crises across the globe, brand activism is on the rise. Certainly, consumers are increasingly looking to brands to take a stand on social and political issues. This can be viewed as a positive development, as it can help to raise awareness of important issues and encourage people to take action.

For example, brands like Dove in Brazil have stepped up, taking active roles in championing social causes[29]. This has resonated deeply with consumers: as our TGI data reveals, the majority of Brazilians place great importance on the ethical operations of a company and its commitment to combatting social inequalities[30].

However, it's important for brands to be authentic in their activism. If they're seen as being insincere or opportunistic, it can backfire and damage their reputation. They might also need to consider the values and attitudes of their market – as Bud Light's recent experiences reveal, mixing activism with mass marketing can have painful consequences if a vocal part of the audience is not in agreement[31].

A humorous revival

In a world where consumers are inundated with serious and often distressing news, humour in advertising is making a triumphant return.

Kantar's studies echo this trend, showing how humour boosts brand impact[32 33]. Even sectors like business-to-business and financial services are now joining the comedy club, as demonstrated by Workday and Partners Life's successful comedic ventures[34 35]. And with Apple's 'R.I.P. Leon' clinching a Grand Prix for film at Cannes, the mood has definitely lightened[36].

The way forward for brands hinges on their ability to harness data and insight

Segmentation moves beyond demographics

As the global cost-of-living crisis has continued throughout 2023, its effects have been widely experienced among consumer groups. This has cemented the view that traditional demographic-based segmentations alone – such as age, sex and gender – no longer suffice; it's now also key to understand attitudes, values and behaviours. Families with the same income spending might have differing spending priorities and different economics strains, for example.

As our Beyond Bias report demonstrates, traditional demographics remain essential, but a behavioural and attitudinal approach to segmentation is better at revealing the reasons behind consumer choices. Embracing this method offers enhanced insights, uncovers niche opportunities, facilitates precise targeting, and promotes brand adaptability[37].

Moreover, the advancements in diversity and inclusion – primarily visible in the creative 'front-facing' aspects of advertising – are now increasingly being integrated by many brands and advertisers into the planning and strategic framework behind the scenes.

Calibration panels will take centre stage

As advertisers pursue the path to cross-media measurement, panels are taking centre stage. This is because such panels serve as the singular 'ground truth', enabling both the buy and sell sides to better comprehend, leverage and maximise the utility of their respective data sets[38].

The value proposition of these panels is further accentuated by the growing recognition of their role in providing a common benchmark. This enables organisations to make more informed decisions based on a unified data set, rather than disparate data points, which is crucial for the integrity and optimisation of cross-media strategies.

As 2023 draws to a close, it's evident that panels used for calibration will increasingly become a cornerstone for audience measurement.

WHAT'S NEXT IN 2024?

Cross-media measurement turns a corner

The need for a holistic view of audience behaviour is prompting advertisers to pursue cross-media measurement solutions. Such solutions offer de-duplicated data on reach and frequency, thus empowering advertisers to better comprehend the scope of their campaigns. While initial advancements have been predominantly focused on viewing forms, as exemplified by projects like Origin in the UK[39], this is a step towards a more inclusive approach that will eventually encompass a broader range of media forms.

As such, the work undertaken to measure cross-platform should be seen as a critical component in the journey towards true cross-media measurement capabilities, rather than the end goal[40].

Amidst fluctuating economic conditions, the allure of cross-media measurement grows more compelling. This is largely due to its capability to provide advertisers with valuable insights that can inform smarter, more efficient investment allocation. In a marketplace that demands optimum use of resources, the increasing role of advanced measurement systems becomes not just beneficial but indispensable for advertisers aiming to maximise the effectiveness of their campaigns.

AVOD will get experimental

In 2024, AVOD's capabilities are set to expand. Beyond video ads, AVOD is already enabling different types of engagement, such as product placement and interactive ads. Some forms even offer shoppable functions that facilitate direct purchases, further blurring the lines between content and commerce[41]. In 2024, expect advertisers and platforms to experiment – and an arms race to get underway as more platforms lean into the AVOD revolution.

Amidst fluctuating economic conditions, the allure of cross-media measurement grows more compelling

Exploring new avenues for targeting

As the ad industry prepares for the impending phase-out of third-party cookies, there's a concerted effort to identify resilient, future-proof methods for precise consumer targeting and segmentation.

A rising enabler is geographical-based targeting. Already available in the UK from Kantar Media's TGI, this solution enables marketers to fine-tune their media plans by scrutinising audience composition at a more granular postcode level.

Looking ahead to 2024 and beyond, it's likely that marketers will continue to innovate and invest in a range of targeting solutions - geographic, contextual or otherwise - beyond the third-party cookie.

VIEWPOINT

THE FOUR PILLARS OF BRAND ADAPTABILITY IN 2024

Steve Silvers
EVP Creative & Media
Kantar

Brands today are constantly dealing with wave after wave of disruption, causing widely accepted fatigue without apology.

If it's not the economy, it's new technology to get to grips with. Or it's political uncertainty. Social issues. Environmental concerns. New regulations. Changing consumer behaviours. And more seems to get added to the list each year.

But if you'll allow me to repurpose Charles Darwin's most famous line about evolution: it is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.

Adaptability is certainly the crux of the challenge for brands. Fortunately, there are some useful strategies that will inform and enable its successful implementation in 2024.

Firstly, a well-crafted brand identity has never been more crucial. Amid a tumultuous environment, knowing who you are as a brand becomes your North Star, guiding your strategic decisions and making it easier to choose from the cacophony of advice and trends. It's akin to having a set of principles or values that not only guide individual behaviour but also inform corporate decisions. If a brand's identity is uncertain or shaky – and trust me, many are – every crisis becomes a potential existential threat. In contrast, a strong brand identity serves as a buffer, enabling you to take calculated risks and adapt effectively to change.

// Data isn't merely a tool for optimisation but a lens through which your brand views the world. //

Secondly, data provides the cornerstone for strategic adaptability. The convergence of analytics and advertising is hardly new, but what's evolved is an increasing awareness of the ethical implications of data use. Companies must wrestle with questions that go beyond mere compliance with legislation. It's about the ethics of data – what you collect, how you use it, and whether it aligns with your brand identity. Data isn't merely a tool for optimisation but a lens through which your brand views the world. Misuse it, and you risk betraying customer trust; use it wisely, and you could unlock novel ways to deliver value.

Thirdly, data use needs impeccable governance and consistency. Brands must ensure alignment between data strategies and their core identity. This is easier said than done given the multitude of rules and regulations across various markets. Yet, governance need not be a labyrinthine conundrum. If your brand knows what it stands for, aligning data usage with identity becomes a natural extension rather than a compliance headache.

Finally, what is increasingly evident in the world of major brands is the prominence of the chief data officer (CDO) role. Far from being just a gatekeeper for data governance, the CDO is emerging as a strategic leader responsible for ensuring that data not only complies with laws and regulations but also serves as a vital asset for brand adaptability. Tasked with broad responsibilities that span data acquisition, governance and science, a CDO ensures that data is the lifeblood of the organisation. The CDO's role is not simply administrative; it's transformative. They operationalise the brand's core values by aligning data practices across departments, thereby enhancing the brand's overall adaptability and resilience in a volatile marketplace.

Success in 2024 will undoubtedly depend on various complex factors, but these four pillars stand out as essential for any brand seeking to solidify its standing. Far from being disparate elements, they form integral aspects of a comprehensive strategy designed to navigate an ever-changing world. Brands that pay attention to these principles now should be well-positioned for the future, less as subjects of change and more as masters of their own course.

TECHNOLOGY: GAMECHANGERS AND FALSE DAWNS

Dive deep into a year of incredible advances, cautionary tales, and the balance of technology's promise against its potential perils.

2023 TRENDS

AI goes mainstream

2023 was a remarkable year for technological progress, as generative artificial intelligence (AI) exploded into the mainstream with the launches of ChatGPT and Bard. The headlines have often been dramatic, with warnings of AI armageddon and mass job replacements, through to more utopian visions in which machines might usher in a new technological age impacting almost every part of our lives, from medicine to homework.

The reality, at least in the media and advertising space, shows some more modest progression on top of an existing body of work, but it is nonetheless exciting. Certainly natural language processing (NLP), the technology that underpins ChatGPT and Bard, is already enhancing content personalisation and engagement, through generating personalised news, improving chatbots and providing better targeted ads.

Meanwhile, diffusion models (which are quickly replacing generative adversarial networks) are now capable of generating lifelike content indistinguishable from that created by humans. This capability is finding applications in various domains, such as generating product images, crafting advertising copy, and even in the development of virtual influencers.

Behind the scenes, machine learning is also increasingly providing automation and efficiency opportunities with the promise to optimise ad placement and predict consumer behaviour or brand performance. In addition, 'deep learning' has improved predictive analytics, personalisation, and even creative content creation. You name it, in 2023 AI and machine learning has somehow been leveraged to support it[42].

2023 was a remarkable year for technological progress, as generative artificial intelligence (AI) exploded into the mainstream.

Privacy-enhancing technologies (PETs)

2023 saw progress in the quest for post-cookie solutions. With 2024 now slated as the official year of deprecation for third-party tracking cookies, privacy-enhancing technologies (PETs) became a beacon of hope for the advertising world[43].

That is thanks, in part, to PETs offering tried and tested methods alongside newer solutions – such as anonymised user profiles and trusted execution environments[44]. This approach allows advertisers to understand their audience without compromising individual privacy.

Alongside this, the challenge of measuring ad performance without invading user privacy is being met head-on by PETs. Here, secure multiparty computation offers the potential for advertisers and publishers to exchange vital data, gauging the effectiveness of their campaigns while keeping sensitive information under wraps.

PETs pave the way for personalised content without the need for intrusive individual tracking. Privacy and personalisation, once thought of as opposing forces, certainly found improved harmony in 2023, promising a brighter and more secure future for online advertising. However, it's important to note that PETs are not a silver bullet (see viewpoint, p45). They can be complex and expensive to implement, and they may not be suitable for all advertising scenarios. It's also important to remember that PETs can only protect user privacy if they are used correctly – so it will be key that the industry is educated regarding their use.

The challenge of measuring ad performance without invading user privacy is being met head-on by PETs.

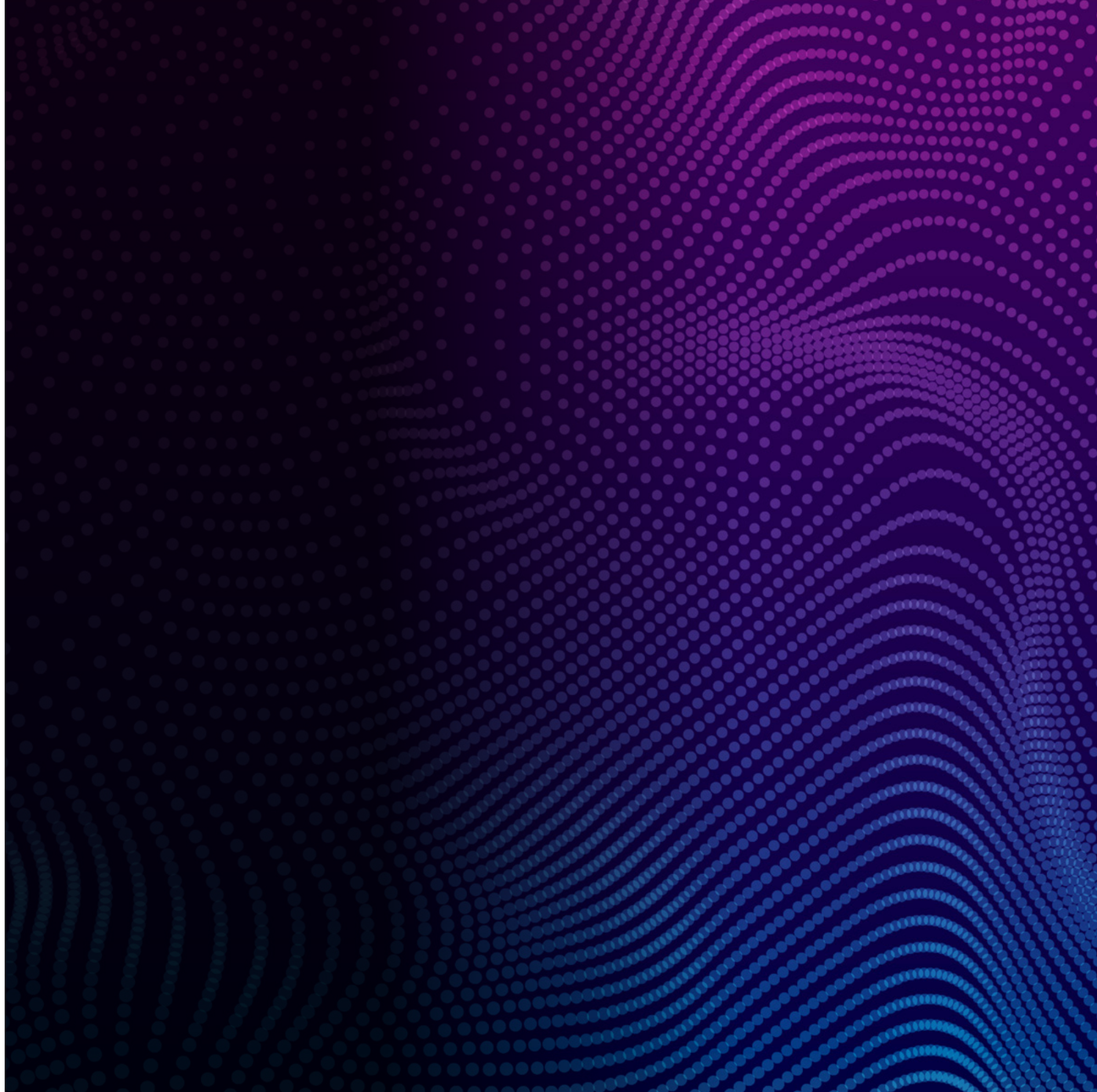
Sustainable goals, technological solutions

In 2023, the media and advertising sectors made further progress towards improved sustainability. At the heart of this shift was a fusion of technology with eco-conscious strategies. Ad Net Zero, for example, continued to promote use of its carbon calculator, enabling advertisers to measure and curtail their campaigns' carbon emissions[45]. Likewise, the Media Climate Charter in the UK is providing media agencies with the tools and resources to support their transition to a zero-carbon future[46].

Adding to this wave of change was the Global Alliance for Responsible Media (GARM), a cross-industry initiative led by the World Federation of Advertisers, which channelled efforts into crafting tech tools for media companies, setting them on a path of measurable carbon reduction[47]. From harnessing renewable energy for powering data centres to leveraging artificial intelligence in refining ad delivery, the union of technology and sustainability became much more clear in 2023.

False technological dawns

Despite many interesting developments in 2023, it's worth noting that last year's hot topics are this year's most underwhelming trends: VR, the metaverse and NFTs might all be considered false dawns. Indeed, with less media coverage focused on the metaverse it could be seen as an example of how short-termism exists among marketers, who can often chase after the shiny new thing despite warnings it's not yet ready or that audiences aren't currently interested. According to Kantar's Media Reactions study last year, a net 61% of marketers claimed they would increase spend in the medium in 2023, but the actual net increase this year was only 12%[48].



WHAT'S NEXT IN 2024?

AI everywhere, all at once

2024 will see the media landscape – for better or worse – make much deeper integrations of AI technologies, deploying test-and-learn methodologies.

Generative AI will particularly stand out with its potential to revolutionise content creation. However, it's unlikely to be all smooth sailing. Intellectual property issues loom large as those responsible grapple over who exactly has rights over AI-generated inputs. Also, how are these inputs funded and acknowledged, and – even more troublesome – how can biases be avoided?

A recent survey by Human Driven AI revealed that 63% of US marketers fear potential copyright issues with AI-generated content, and instances have already emerged of artists suing generative AI platforms for using their works without permission. Additionally, 41% expressed apprehensions about biases in AI tools, which might have been absorbed from online content[49].

As the year unfolds, we can expect these questions to drive debates. Meanwhile, ethical considerations related to AI will gain traction. While there's enthusiasm for AI's capabilities, concerns over its responsible usage may manifest in increased lawsuits and – as we saw with 2023's writers' and actors' strikes – public demonstrations over its use to replace people.

Overcoming privacy tech challenges

Although PETs are likely to take centre stage in 2024, some key challenges remain – particularly around accuracy, cost considerations and user acceptance. However, data science techniques, especially those involving data fusion and integration, are proving to be invaluable tools in overcoming some of these issues.

The importance of shifting from a device-centric to a people-centric approach also cannot be overstated. Devices don't watch content and advertising, people do. In this context, calibration panels will emerge as fundamental for achieving this shift. Such panels serve as a hub for data integration, calculating reach overlap, and personalising device usage data. They provide the ground truth to deliver deduplicated audience data across various platforms and devices, an essential capability in our increasingly fragmented cross-media landscape.

Another critical factor in the success of PETs will be users' trust: ensuring data privacy could be the gamechanger in their adoption. Consequently, 2024 will require platforms to educate users about PETs, foster a culture of transparency about data collection and use, and ensure new industry standards are set and adopted[50].

Tech-driven sustainability to drive media and advertising

Consumers are demanding more eco-friendly products and services, and businesses are recognising the financial and reputational benefits of sustainability.

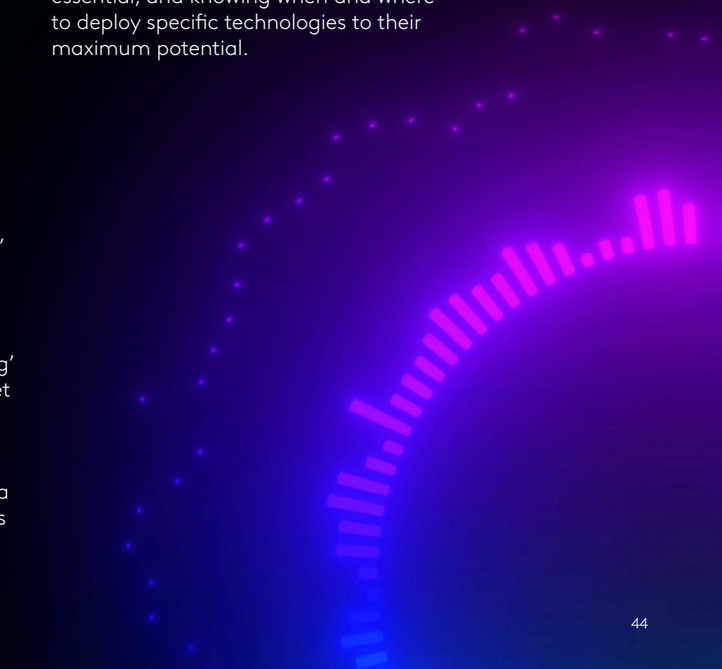
In 2024, we can expect to see clients take further steps to reduce their environmental impact to hit their COP21 targets. Media companies will increasingly switch to renewable energy, use more efficient resources, and look to reduce their supply chain emissions. They're also more likely to produce content that's more sustainable, both in terms of the production process and the content itself.

The rise of green media and the development of new sustainability metrics will also be important trends in 2024. As the demand for sustainable media products and services grows, media companies will need to find new ways to measure their sustainability performance. That means we should expect to witness the development of robust sustainability metrics in 2024 – perhaps similar to the 'Circular Marketing' framework highlighted at Cannes Lions or as set out in the IAB's sustainability playbook[51].

The logical extension of these measurements is that they could also feed into sustainable media planning – helping advertisers build media plans around the sustainability of the channels they're using.

Too much tech?

2024 may witness an ironic predicament - an abundance of tech solutions, but a potential increase in ad wastage. With numerous technological advancements at their fingertips, businesses could struggle with identifying the most effective tools for their operations. An inability to navigate through the tech 'noise' may lead to poorly allocated resources and investments. So, for companies, the emphasis should be on sorting the essential from the non-essential, and knowing when and where to deploy specific technologies to their maximum potential.



VIEWPOINT

NEW TECH IS BALANCING PRIVACY AND PERSONALISATION, BUT THE WAY WE USE IT WILL BE CRITICAL TO ITS ADOPTION AND SUCCESS

Manish Bhatia
Chief Growth & Product Officer
Kantar Media

As we approach 2024, there's a sense of urgency to find robust solutions to the challenges presented by increasingly stringent privacy regulations.

Third-party tracking cookies are on their way out, and other limitations such as Apple's restrictive tracking policies add another layer of complexity. Yet, the industry has found a beacon of hope in privacy-enhancing technologies (PETs).

In 2023, PETs have demonstrated their potential to reconcile the conflicting goals of privacy and personalisation. Technologies like anonymised user profiles and data clean rooms allow advertisers to gain crucial insights into their audience without violating privacy norms. Secure multiparty computation is another innovation, enabling advertisers and publishers to exchange vital information while ensuring that sensitive data remains confidential.

//

Machines can efficiently process tasks, but human expertise and oversight will remain paramount.

//

However, these solutions should not be seen as silver bullets; they are very much still in development, and there are multiple challenges we must overcome. From my perspective, the chief among those hurdles is data quality. The principle of 'garbage in, garbage out' holds true in this context; if the initial data is flawed, the outcome, no matter how advanced the technology, will be compromised. Advertisers must be exceedingly cautious about the quality of data they integrate into these systems.

Human oversight is another key element that cannot be ignored. While PETs and other forms of advanced tech are excellent at performing heavy lifting tasks, they are not some magical all-purpose remedy. We must be prudent here. Machines can efficiently process the bulk of the tasks, but human expertise and oversight – particularly in regards to assessing data-quality and adherence to privacy – will remain paramount.

Another obstacle is scalability. While larger markets may embrace a particular solution, smaller markets may not be able to do the same due to financial constraints or varying privacy laws. Thus, it's essential for the industry to develop solutions that are not only technically feasible but economically viable across different markets. As PETs are increasingly adopted in 2024, we'll need to work together to find solutions that work for everyone.

The industry is at an experimental stage, where numerous players are testing different approaches to integrate data. This could lead to inefficiency as companies scramble to keep up with varying protocols from multiple platforms. It's crucial for the industry to standardise best practices and move towards fewer, more efficient options for data integration.

Through collective effort and industry-wide education, we can hopefully find the right balance between privacy and personalisation, paving the way for a more ethical and effective cross-media advertising landscape.

STRENGTHENING THE SIGNAL: AUDIENCES IN HIGH DEFINITION

By adopting more advanced strategies, businesses are supercharging their data and enriching their understanding of audiences – but it's not without challenges...

2023 TRENDS

The granular data boost

In 2023, the business landscape reached an inflection point due to an uptick in the adoption of granular data strategies. This shift was not merely coincidental; it was facilitated by the increasing availability of multiple sources of data. These range from direct-from-device information, such as Smart and Connected TVs, to first-party data owned by platforms and advertisers. In addition, streaming services and the wider industry's support for better measurement have contributed to this shift.

As a result, companies are now harnessing data to gain an even more granular understanding of customer behaviours and preferences. These insights, which can accurately identify trends and patterns, are proving instrumental in the development of effective campaigns, improved customer experiences, product development and pricing strategies.

However, it's not all smooth sailing. While more data offers invaluable insights, businesses must also adapt swiftly to evolving customer needs (as discussed in chapter 2, p17). The good news is that increasingly granular data offers the agility necessary to stay ahead of the curve.
It strengthens the 'signal' by providing more precise and actionable insights that drive informed decisions.

To underscore the promise of this development, the broad availability of first-party data is leveraged alongside existing panels, thereby strengthening the consumer signal. As we capitalise on these rich, multifaceted data sources, we can only expect our strategies to become even more effective. In essence, when it comes to the applications and effectiveness of granular data, things can only get better.

The rise of connected TV opens new data capture opportunities

Connected TVs (CTVs) have experienced rising adoption rates globally in 2023, adding another layer to the data landscape[52]. As people increasingly rely on CTV for their entertainment needs, businesses find themselves with a further source to ingest device data to enrich their understanding of viewership at a granular level.

This new avenue offers a wealth of potential insights into audience viewing, including viewing patterns and preferences for specific types of content. As media consumption becomes more fragmented, CTVs provide an invaluable data source that can be ingested into measurement systems to understand these complex audience behaviours.

Indeed, it's one of the motivating factors behind Comcast, Roku and Charter joining Amazon and Sky in announcing plans to build their own TV sets[53].

CTV CASE STUDY

Enhancing insights into RTVE's audience

As audiences fragment and advertising becomes increasingly targeted, panels can be enhanced to increase the precision of audience measurement and to leverage new data sets. In Spain, Kantar Media is taking on this challenge by ingesting large-scale data directly from connected TVs with its own panel demographic data – thus enlarging the data set.

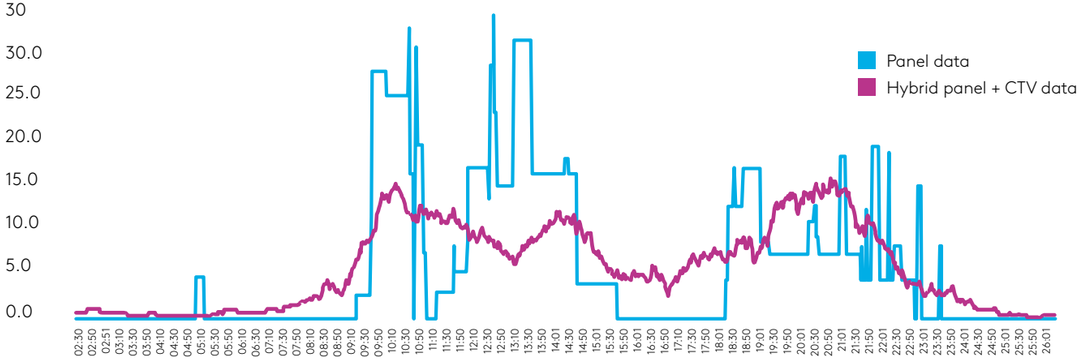
Data science techniques are used to integrate the data sets, with a subset of CTV data expanding the reporting sample, thereby augmenting the robustness of the insights and enhancing the levels of granularity.

For example, the Spanish children's TV channel CLAN from RTVE was able to use a subset of HbbTV census data to enlarge the reporting sample to 100,000 individuals - resulting in a clear improvement in granularity and achieving smoother daily audience curves.

In the chart, we see the minute-by-minute curve for CLAN in the 20 to 34-year-old target, where it shows high fluctuations. Once the fusion is done, the curve smoothes out and continues to show the same trends.

Using a hybrid approach to boost data precision for a children's TV channel in Spain

Focus on a minority audiences of 20 to 34-year-olds



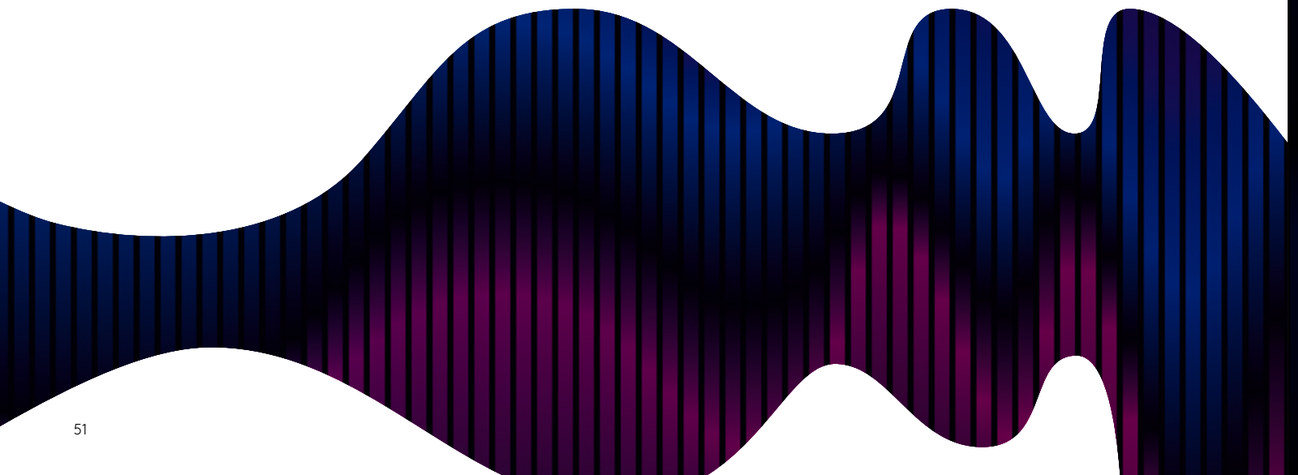
Source: Kantar Media Spain 2023

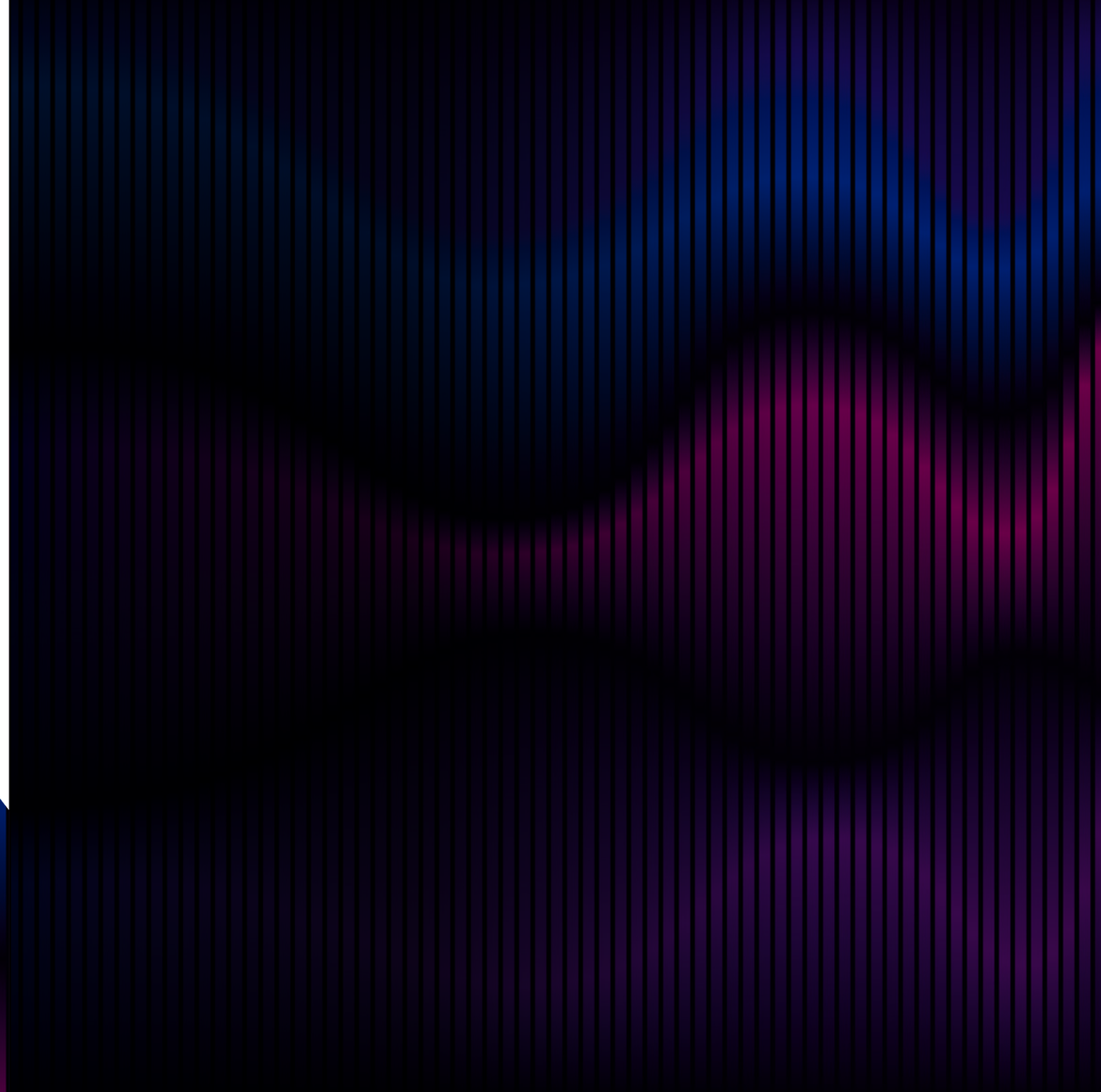
Under-exploitation of data weakens the signal

Despite the increasing availability of data, many media businesses are not leveraging it to its full potential. There are a number of reasons for this. Businesses might not have the time or resources, or they may not have the right tools or expertise in place. Additionally, some businesses may be hesitant to use data for audience insights because they're concerned about privacy or security issues[54].

One way to better leverage first-party data, as we noted above, is by combining it with third-party data, which allows businesses to create a more complete view of their customers. This information can then be used to gain deeper insights into customer behaviour and preferences.

One way to better leverage first-party data is by combining it with third-party data, which allows businesses to create a more complete view of their customers.





WHAT'S NEXT IN 2024?

Data application - towards predictive modelling

By understanding historical patterns and current data points, media and advertising businesses will increasingly anticipate future trends, allowing them to produce content and campaigns that resonate more deeply with their target audience. Businesses can continue to unlock more proactive and adaptive strategies in content creation and advertising[55].

Businesses to supercharge their data sets

Advertisers and content owners will continue to move beyond siloed first-party data to integrate information from varied sources, crafting a holistic understanding of their audience. This amalgamation, especially leveraging existing currency-grade data sets, will provide richer insights, enabling advertisers and content creators to produce more nuanced and effective strategies.

AI-driven data enhancement

The application of machine learning and generative AI to data sets could revolutionise how the media and advertising sectors think about industry data use. These technologies can refine the data we have, uncover hidden patterns, and suggest strategic directions previously unthought of.

Diversifying data processes

The call for diversity is echoing beyond just visible representation. In 2024, expect more pronounced emphasis on ensuring diversity within data handling practices.

There will be increased flexibility using a widening range of appropriate techniques in the ways businesses use data too, from calibrating first-party data with panel data, to leveraging other data sources. The future is about finding new and alternative ways to maximise the value and impact of existing data to greater effect.

The future is about finding new and alternative ways to maximise the value and impact of existing data to greater effect.

VIEWPOINT

NEW SOURCES OF GRANULAR DATA WILL OPEN UP A NEW FRONTIER IN 2024

Melissa Vogel
CEO - Brazil
Kantar IBOPE Media

Over the course of 2023, granularity in data has become a focal point of interest and investment.

With the advent of multiple data sources – ranging from connected TVs to proprietary first-party databases – businesses are increasingly capturing high-resolution data to gain more nuanced insights into consumer behaviours and preferences. This level of detail is proving instrumental in the creation of better targeted marketing campaigns, in enhanced customer experiences, and in fine-tuning product development and pricing strategies.

However, the benefits of granular data are accompanied by a set of challenges that need careful management. In 2024, to get the most from this new frontier, we need to address these issues.

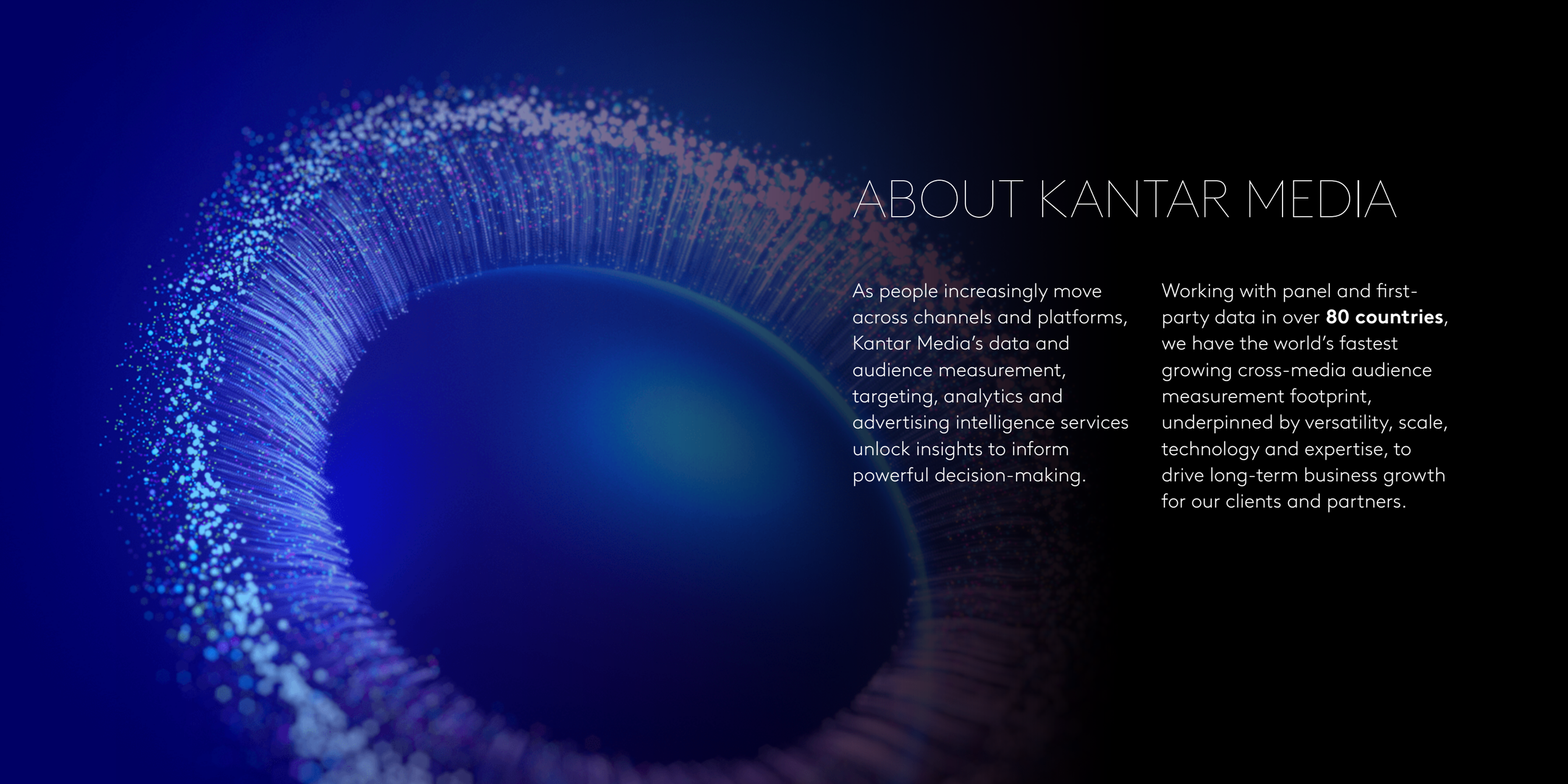
Firstly, while new sources of data can help both the buy and sell side unlock more value, it also raises concerns of data overload. The sheer volume of information captured can be overwhelming and necessitates robust data management systems and skilled professionals to interpret it meaningfully. Moreover, the granularity of data, especially when it pertains to individual behaviours and preferences, brings into focus pressing issues around privacy and data protection. Businesses must be rigorously compliant.

"There is much to learn, but 2024 is the year in which serious progress will be made. Indeed, the potential depth of understanding could be truly transformative."

There's also the matter of data quality. While granular data is rich in detail, it is not inherently good data. Stringent processes of validation and verification are essential to sift through this plethora of information to extract insights that are both accurate and actionable. This, in turn, calls for substantial investment in technology and expertise. For smaller businesses, the cost of acquiring, storing and analysing granular data can be a significant barrier, making it challenging to compete in an increasingly data-driven market.

But even with these challenges, the opportunities that granularity presents are compelling. For example, with connected TVs, we see a rising adoption rate that gives businesses unprecedented access to evermore granular data (see CTV case study, p50). This offers an invaluable platform for understanding complex audience behaviours, thereby shaping more effective advertising or content strategies. Panel data has also proven to be a powerful asset, and will increasingly be used to validate the insights gained from first-party data and to provide a broader understanding of market trends and consumer attitudes.

There is much to learn, but 2024 is the year in which serious progress will be made. Indeed, the potential depth of understanding could be truly transformative. But this potential can only be fully realised with a judicious approach that balances the benefits of granularity against the complexities and challenges it introduces. Let's take on the challenge together.



ABOUT KANTAR MEDIA

As people increasingly move across channels and platforms, Kantar Media's data and audience measurement, targeting, analytics and advertising intelligence services unlock insights to inform powerful decision-making.

Working with panel and first-party data in over **80 countries**, we have the world's fastest growing cross-media audience measurement footprint, underpinned by versatility, scale, technology and expertise, to drive long-term business growth for our clients and partners.

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