

MEDIA



THE PACE OF PROGRESS
2024 MEDIA TRENDS

TRENDS



INTRODUCTION

Growth is a function of seizing the right opportunity at the right time, and we see a number of new growth opportunities on the horizon in 2024.

Generative AI is the most disruptive technology breakthrough of the last decade. With six out of ten respondents to the dentsu 2023 Global Media Client Survey reporting they are already engaging with generative AI in their marketing activities,¹ the technology is set to take center stage in the coming months and years. From search to creativity, to media planning and production, generative AI takes media effectiveness to new heights.

2024 will also see the intensification of competition between tech platforms. As they strive to better monetize

their services in tighter economic circumstances, platforms will double down on people intelligence, become more protective of their data, and step up their advertising offerings.

Yet, growth in the next year will not only be about hard economics; it will also be about brands' sustainable contributions to society. Amid rising societal polarization and climate emergency, building more carbon efficient, diverse, and safe online spaces for people and brands will be central to success.

We are proud to share with you our dentsu 14th annual Media Trends report, wherein we explore the opportunities, challenges, and intricacies of ten trends expected to set the pace of progress in the coming year.



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CONTENTS

PART	01	GENERATIVE AI TAKES CENTER STAGE	4
	TREND 1	/ The Rise of Generative Search	6
	TREND 2	/ Creativity Reimagined	9
	TREND 3	/ Generative Optimizations	12
		Considerations For Brands	15
PART	02	THE RACE TO MONETIZATION	16
	Trend 4	/ A World of Lookalike Apps	18
	Trend 5	/ From Walled Gardens to Walled Pipes	21
	Trend 6	/ The Identity Refocus	24
	Trend 7	/ More Ads For More Returns	27
		Considerations For Brands	30
PART	03	INTEGRITY ECONOMICS	31
	Trend 8	/ The New Faces of Growth	33
	Trend 9	/ Safer, Better, Faster, Stronger	36
	Trend 10	/ More Attention, Fewer Emissions	39
		Considerations For Brands	42
		Credits	43
		About dentsu	43



PART **01**

**GENERATIVE
AI TAKES
CENTER STAGE**



PART

01

GENERATIVE AI TAKES CENTER STAGE

Artificial Intelligence (AI) already underpins many everyday interactions, including product recommendations, auto correct, and camera enhancements. Generative AI is something new. This subset of AI uses deep learning algorithms to generate new content such as images, text, or sound, and represents a seismic shift in the technology and its waves will have far reaching impact across industry and society.

Generative AI has the potential to enhance our cognitive capabilities and allows us to solve problems in new ways. According to dentsu research, 91% of CMOs believe this technology is the future and not a fad, and 78% of consumers agree.²

While not exempt from criticism and already in the spotlight of policy and regulation, generative AI applications have the potential to lead to a period of growth for media and a new golden age of creativity.

TREND 1

THE RISE OF GENERATIVE SEARCH

Generative AI will transform how people access information, from search engines to commerce platforms.

TREND 2

CREATIVITY REIMAGINED

Generative AI will augment human creativity in fields including writing and images.

TREND 3

GENERATIVE OPTIMIZATIONS

Generative AI will simplify advertising production, targeting, and effectiveness.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 1

THE RISE OF GENERATIVE SEARCH

Generative AI is a nascent yet fast-growing technology that has the potential to revolutionize how people search and access information online, and by extension, how they interact with brands. It is already making its way to search engine result pages, is breathing new life into virtual assistants, and is percolating in everyday services with no sign of slowing down in 2024.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 1

THE RISE OF GENERATIVE SEARCH

The promise of more **natural** interactions

Over the last 25 years, search engines have become a central starting point for anyone looking to learn, shop, be entertained or get informed online. During that time, technology companies have been on a quest to better understand users to make their search engines more sophisticated, convenient, and relevant. Yet, the way people search has not fundamentally evolved. As we try to get the machines to understand us, we tend to use odd, concise phrasing packed with keywords rather than free-flowing conversations.

Generative AI represents a massive paradigm shift in how we search, to the point it feels almost magical for any first-time user. The ability to use natural language, to get an actual answer rather than an index of links, and to follow up on questions is a game changer for our relation to technology.

It is not surprising then that leaders in search have started to integrate generative AI into their search engines, with Microsoft bringing ChatGPT capabilities into Bing³ and Google using its conversational AI service Bard to create Search Generative Experience.⁴

However, generative AI's path to search domination faces two significant obstacles. First, AI-generated answers can be confidently wrong and rife with bias, and "hallucinations" can creep into the output. Second, monetization – likely to rely heavily on advertising – is yet to be defined.

While platforms strive to overcome these obstacles, advertisers can already benefit from generative AI developments to increase the effectiveness and efficiency of their search investments, from simplifying the working processes to improving campaign performance. Applications include gathering competitive intelligence, developing large amounts of ad copy variations that match the brand voice, suggesting keywords,

THE RISE OF GENERATIVE SEARCH

and increasing the frequency of testing. Ultimately, generative AI enables faster scaling of media campaigns to better capture consumer demand.

Embedded concierges bubble up **everywhere**

All the rage in 2016 and pronounced dead by many in 2018, chatbots are back, this time supercharged with generative AI and the capabilities of doing more than launching a playlist or sharing weather forecasts.

As the frequency of exposure to generative AI will play a big part in changing people's behaviors, companies like OpenAI are actively looking to embed ChatGPT in people's daily lives by supporting plugins.⁵ For brands, this represents an opportunity to elevate their customer experience, especially those with large product catalogues. By

using AI-generated concierges, brands can turn massive amounts of information into personalized answers tailored to people's needs and, in doing so, reduce choice paralysis.

KAYAK, the travel search engine, uses the technology to respond to questions such as 'Where can I fly to from NYC for under \$500 in April?'.⁶ More than 150m people have already used myAI, Snapchat's chatbot powered by generative AI, for everything from design inspiration to recommendations for skincare.⁷

2024 is set to experience a revival in chatbots, and brands should take another look at them now that generative AI has revolutionized their capabilities.



What's Next?

As generative AI-powered search gains traction from customer support to product recommendations, new ad opportunities are expected to emerge to target very qualified users with very detailed answers. If it becomes the norm, consumers' expectations could increase, and apps and sites not integrating these capabilities may become less relevant.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 2

CREATIVITY REIMAGINED

In 1990, Steve Jobs described the computer as a bicycle for our minds.⁸ In 2024, generative AI will jump straight to the copilot's seat, unleashing a new age of creativity where lines get blurred about who – or what – performs a given task, and new questions from copyright infringement to the very nature of creativity will arise.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 2

CREATIVITY REIMAGINED

An **expanding** toolkit

The ability to create content at scale and on demand through generative AI shows how big an impact the technology can have on media and advertising. Just as the internet revolutionized content distribution, generative AI has the potential to do the same for content creation for brands.

The AI space is already booming with contributions from companies and enthusiasts alike. For instance, the e-commerce platform Shopify recently introduced Shopify Magic, which automatically generates blog copy for online store owners with a given tone of voice.⁹

As marketers explore these tools, companies are looking for the right balance between fostering experimentation and preventing data risks across unvetted environments. Dentsu is actively partnering with Microsoft

to launch enterprise-wide access to advanced Azure OpenAI technologies,¹⁰ an approach that empowers employees to develop creative solutions to drive growth and efficiency from the safety of a private, enterprise-grade, secure development environment.

Creation for **all**

The most headline-grabbing application of generative AI is in art and design. Platforms such as Stable Diffusion can help anyone generate limitless combinations of imagery in any style, including ultrarealistic compositions. A prompt like “serene vacation lake house, watercolor painting” is all it takes to get started.

Brands have already started testing the waters of AI-generated creation. Heinz prompted DALL-E 2 to create images of ketchup which resulted in a myriad of images of ketchup bottles all shaped like the iconic

CREATIVITY REIMAGINED

Heinz ketchup bottle.¹¹ Since generative AI is trained on large datasets of existing images, this campaign cleverly illustrated the dominance of Heinz across the category.

Generative AI heralds a creative revolution for brands with execution left to technology and replaced with a focus on ideation and *prompt engineering*. By removing barriers to creation, generative AI democratizes it to the masses and leads to a new creator economy. Yet, this model raises new questions on how brands will stand out in a world flooded with AI-generated images.

Rights gone **wrong**

A more immediate concern expected to top the agenda in 2024 is the one of rights, as generative AI models collide with intellectual property. Artists and image libraries argue that models must have been trained on their data without permission to generate new pictures. Marketers must guard against exposing their brands to legal and reputational challenges by taking operational steps to avoid including

copyright protected material when they use generative AI (e.g., prompt wording, modifying outputs, training dataset diligence).

Legislators are trying to clarify the limits of derivative work in the age of generative AI. For instance, the EU's AI Act is heading toward transparency requirements such as disclosing content generated by AI and publishing summaries of copyrighted data used for training.¹² It is crucial that brands continue to work closely with legal experts to understand the fast-moving regulatory patchwork.

Businesses and right holders also look for ways to reward human creativity. Adobe, which has trained its Firefly model on Adobe Stock, openly licensed content, and other public domain content, is exploring a compensation model for creators.¹³ As brands are an integral part of pop culture, it is time to reflect on whether they want to let consumers build upon their intellectual property through generative AI – and how.



What's Next?

Generative AI creative outputs will become more nuanced, from more detailed images to new forms of music. As models get easier to use, it will be easier for individuals and brands to explore new avenues for creative expression.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 3

GENERATIVE OPTIMIZATIONS

The influence of artificial intelligence has grown dramatically within the advertising industry. From creative production and copywriting to ad targeting, generative AI will open a new horizon of improvements both in terms of media efficiency and media effectiveness, in 2024 and beyond.



PART 01

GENERATIVE AI TAKES CENTER STAGE

TREND 3

GENERATIVE OPTIMIZATIONS

AI-powered **production**

Eighty-six percent of CMOs now think AI will improve efficiency.¹⁴ Content production will see some of the greatest efficiency gains from leveraging generative AI.

The global creative production powerhouse Tag has identified three keyspaces to watch.¹⁵ First, research and ideation, where teams will use generative AI to test initial ideas or complete industry research faster to shorten the inspiration process and articulate an initial hypothesis. Second, content delivery, where the technology will help generate mood boards and storyboards, or quickly mock-up concepts. Third, administrative assistance, where generative AI will free teams from time-consuming repetitive tasks such as creating hundreds of variations from an original template and manually tagging digital assets.

While generative AI provides a new way to collaborate and create at scale, it is not a one-stop solve-all solution for creative production, and it still requires human critical thinking and supervision. Teams will need to combine prompting and proofing to make the most of the technology, which in return will help them upskill into new domains.

AI-optimized **campaigns**

Major technology and media platforms have introduced AI-powered solutions to improve the effectiveness of advertising campaigns run across their ecosystem.

Meta Advantage+ allows direct response advertisers to upload campaign assets including images, text, and links to commerce pages. The advertiser and agency then relinquish some control of the campaign performance optimization to let Meta's AI-powered technology make decisions

GENERATIVE OPTIMIZATIONS

including adapting the creative, placements, budget and audience targeting, to generate as many conversions as possible.¹⁶ As the company claims investment in AI has contributed to a 20% increase in conversions for advertisers in 2022,¹⁷ it will likely introduce new AI-powered advertising solutions in the near future.

Google goes one step further toward generative AI-driven performance. Their solution Product Studio, planned for global rollout in 2024, aims to give brands the possibility to automatically create custom scenes in their product images, using simple prompts such as “surrounded by peaches, with tropical plants in the background” to create several background options.¹⁸

As with content production, marketers need to understand the pros and cons of using these new platform features.

Generative AI is a tool that will enable marketers to analyze data far more quickly and accurately than previous technologies, and use its findings to solve problems creatively. Walled gardens benefit from their ability to both see which ads drive interactions within their closed ecosystem of signed-in users, and spot patterns across huge amounts of data to predict the impact of small adjustments on performance.

However, while everyone wants better effectiveness, successful use of AI will involve some loss of understanding and control on the campaign optimization process. It is also important to note that these platform-led optimizations, built on extensive and proprietary data sets, can only happen within their ecosystem rather than at campaign level – hence the importance of strong planning expertise and people intelligence to drive media effectiveness across the board.



What's Next?

AI-enabled optimizations could shift power to the largest advertising vendors who have the most resources and data to train their models and implement them in their campaign planning, management, and measurement suite. Smaller players may still be able to compete by engaging in strategic alliances to build their own, shared generative AI solution for advertising.

PART 01 GENERATIVE AI TAKES CENTER STAGE

Generative AI represents a potentially seismic change for brands and consumers. It is essential that media experts understand the impact of this technology on their businesses and audiences and get ready to take full advantage in 2024.

Assess opportunities for **new audience value**

Avoid gimmicky applications of generative AI by identifying clear use cases where this technology can improve your customer experience. What value can it create, and what pain points can it alleviate? From better ways to navigate through your product catalogue to always-on customer support, determine options with greater impact for consumers. Anticipate intellectual property questions by reflecting on how permissive or restrictive your company should be with users eager to build upon your brand through generative AI.

Evaluate potential **gains for media**

Identify experimental opportunities (i.e., low risk use cases that can be rapidly piloted) and transformational opportunities (i.e., use cases that can create true breakthrough) for media efficiency and effectiveness. This encompasses access to new intelligence, from different consumer insights to faster performance analysis. It is also about better team support, including freeing time for planners and creatives to focus on strategic tasks, and offering new creative and ad targeting optimizations.

Define the **rules of engagement**

Conduct due diligence before starting generative AI-enabled initiatives, as this powerful technology calls for responsible use. This includes understanding audience expectations, the limitations of the technology, the impact on ways of working, the legal framework, and the data used for training models. It also requires clear ethical commitments and guidelines which we will discuss in Part 3.



PART **02**

THE RACE TO
MONETIZATION



PART 02 THE RACE TO MONETIZATION

Digital advertising spend is expected to grow by a mere 6.6% three-year compound annual growth rate between 2023 and 2025. This is remarkable as single-digit growth has only happened twice in the last 20 years: in 2009 (financial crisis consequences) and in 2020 (COVID-19 pandemic).¹⁹

Amid this slowdown of one of their main sources of revenue, digital platforms have engaged in a more

aggressive race to monetization, striving to maximize the value of their services, content, data, and ad offering.

Marketers must keep abreast of these efficiency-driven changes at play across these platforms that remain critical to reach large audiences.

TREND 4

A WORLD OF LOOKALIKE APPS

As platforms become progressively similar, attracting audience attention has never been more important for brands.

TREND 6

THE IDENTITY REFOCUS

Platforms double down on people intelligence as third-party cookies approach the end of the line.

TREND 5

FROM WALLED GARDENS TO WALLED PIPES

Platforms have a more defensive stance on their data and that opens the larger question of the delicate balance between protection and discoverability.

TREND 7

MORE ADS FOR MORE RETURNS

As platforms expand advertising into new areas and new formats, opportunities – and risks – emerge.



PART 02

THE RACE TO MONETIZATION

TREND 4

A WORLD OF LOOKALIKE APPS

Same looks, same formats, same user experiences. It will become increasingly hard to tell social platforms apart in 2024, as they replicate the successful features of competitors to keep audiences within their ecosystems. As uniformity becomes the norm, it is key for brands to invest in attention to stand out.



A WORLD OF LOOKALIKE APPS

Uniformity for **everyone**

A few years ago, differentiation was the thing for platforms. Each app used originality to carve its niche and attract users, from X (formerly Twitter)'s following and retweeting to Pinterest's pins and boards. Even Snapchat's lack of intuitiveness played a part in its success, encouraging friends to explain its intricacies to each other while keeping parents at bay.

Today, popular apps have never looked so similar. The Spotify app features short musical videos reminiscent of the scrolling videos in TikTok. Instagram recently launched Threads, a text-based conversation app very similar to X. And X wants to combine audio, video, messaging, and payments/banking.²⁰

The benefits for platforms are clear. While no Western app has yet cracked the code to build a super app similar to WeChat in China or Line in Japan, they still aim to become the

go-to apps around which people's digital lives gravitate. Offering the most popular features in one place is a way to retain users and increase average time spent in the application.

A platform's adoption of familiar user experience also facilitates user onboarding so that people can use the service from day one. Possibly the ultimate example of this is Instagram's Threads, which lets people sign up by using their existing Instagram account credentials²¹ and uses their Instagram connections to make their first steps on Threads more welcoming.²² This strategy made Threads one of the fastest growing social apps in history, signing up 100 million users in five days.²³ Additionally, content creators can leverage similar designs to publish more often, as they can easily cross-post content made for one platform to the other.

A WORLD OF LOOKALIKE APPS

Finally, as platforms are under pressure to be more profitable, replicating already proven and successful features is cheaper, faster, and less risky for them than rolling out brand new, highly differentiated features to users.

The attention equation

As research from Kantar shows that being different is the ultimate commercial competitive weapon in inflationary times, allowing brands to charge more and making them less substitutable,²⁴ how can brands stand out if platforms look increasingly similar?

For the last five years, the dentsu Attention Economy program has changed how we plan media for many clients, with results showing the many benefits of attention, from brand recall to brand choice, and it even has an

impact on carbon efficiency.²⁵ Attention is a more meaningful way than impressions to buy and measure campaigns, as it goes beyond viewable ads to focus on viewed ads. It also shows that creative is the main driver of attention effectiveness, as the difference between good creative and poor creative can impact recall by 17%.²⁶ In a world of increasingly similar apps, creative will play an even greater role for brands looking to capture attention in the future.

Also, while apps increasingly look the same, it does not mean they are the homes to similar audiences, that people use them for the same reasons and in the same context, or that they have singular formats (e.g., Snapchat AR lenses were viewed longer than other social formats²⁷). By using attention in planning strategies, brands can make the most of these parameters to stand out and achieve their goals.



What's Next?

As leading platforms trend toward uniformity, we could see more similarity between formats, which could lead to production efficiencies for brands. Yet, it could also mean increased competition for the most attention-grabbing slots. Niche apps will introduce unique features, but it is uncertain how many will reach critical mass before seeing their features replicated everywhere.



PART 02

THE RACE TO MONETIZATION

TREND 5

FROM WALLED GARDENS TO WALLED PIPES

Over the years, walled gardens have become a cornerstone of the media landscape. Yet, as these closed ecosystems face challenging growth outlooks, they now take a much more defensive view of not only their platforms, but also the pipes that connect them to the wider web. This dynamic underpins a larger concept that brands will increasingly hear in 2024: content protection and anti-scraping policies.

FROM WALLED GARDENS TO WALLED PIPES

Content and API **protectionism** is on the rise

In June 2023, Twitch announced new branded content guidelines that would have restricted creators' ability to embed advertising into their streams via third-party technology providers, potentially reducing their revenue, but the company quickly announced it would remove the guidelines after users pushed back.²⁸

Yet, other platforms have decided to weather users' outrage and implemented policies giving them more control over their users' experience, and limiting how third parties access their data and interact with their users.

For years, X and Reddit allowed third parties to create apps based on their content with little restriction, to give users a different way to access their ecosystems, and

appeal to wider audiences. Third parties could leverage application programming interfaces (APIs) to integrate tweets or publications into their own apps. Popular services such as TweetDeck emerged, offering personalization, easier account management, and even new features. But in 2023, both X and Reddit introduced new paying API plans²⁹ and limitations to their free plans,³⁰ resulting in services shutting down and temporary boycotts from users.³¹

Anti-scraping gains **momentum**

There are three reasons tech platforms are more protective of their APIs. First, platforms want higher monetary compensation to offset the infrastructure cost of processing data for them. Second, platforms would prefer getting their users back into environments where they can collect first-party data and serve ads. This would offer brands a larger ad inventory available and better ad targeting. Finally,

FROM WALLED GARDENS TO WALLED PIPES

there is a suspicion that some third parties may be using APIs to compile the billions of conversations published on the platforms as source of people intelligence to train generative AI.

This last reason now goes far beyond walled gardens and APIs, and an increasing number of companies is looking to prevent scraping of their content.

OpenAI has recently launched GPTBot.³² This bot's way of working is reminiscent of search engines' web crawlers, combing through websites to extract information. However, this is where the similarities end. Search engine web crawlers aim to index content; GPTBot aims to help AI models become more sophisticated. For content owners like brands, while the benefits of the former are clear – visibility and site traffic, the benefits of the latter are not.

Leading publications like *The New York Times* have already attempted to restrict scraping for generative AI by updating their terms of service to prohibit training machine learning or artificial intelligence without prior written consent,³³ and we expect similar protective moves to boom across industries in 2024.

On the short term, brands can decide whether they want to implement the technical means to opt out from AI-training crawlers. For example, it is possible to disallow or limit GPTBot access to a website by editing its robots.txt file,³⁴ a file search well known by search engine optimization specialists. In the long term, brands will face the balancing exercise of simultaneously enabling the discoverability of their content and protecting it.



What's Next?

More platforms will adopt protective measures to prevent involuntary contribution to the development of services competing for their audiences' attention, and to better control their audience experience and monetization. This will lead to new opportunities for advertisers to better reach these audiences through advertising and could open data partnerships possibilities.



PART 02

THE RACE TO MONETIZATION

TREND 6

THE IDENTITY REFOCUS

Amid economic uncertainty, platforms refocus on what has built their commercial success over the years: their ability to accurately address people at scale. This translates into a push on user identity as third-party cookies will likely be deprecated in 2024.



THE IDENTITY REFOCUS

Chasing **blind spots**

Netflix is a good example of a platform doubling down on identity. The platform gives users five profiles per account, so that housemates can log in separately and maintain their own watch lists.

However, many account holders got in the habit of giving access to people outside their households by sharing their log-in credentials. With more than 100 million households reportedly sharing accounts,³⁵ costing Netflix potential millions of dollars per year in lost revenue, the platform decided to crack down on that habit using information such as IP addresses, device IDs and account activity to determine which devices are part of a household.³⁶ Following initial testing in Latin America, Netflix has been rolling this restriction across markets³⁷ such as India, South Africa, and Australia,

with in some countries the option for users to pay more, or to cut off their guest users.

Netflix benefits in two ways. First, it earns revenue from users who pay to share their subscription with non-household members and from those who were previously on a household plan but now pay for their own accounts. Second, Netflix expands its user base for its ad-supported plan to capture a larger share of brands' media budgets.

Verify to **identify**

As platforms refocus on identity, many embrace a freemium model. Snapchat now has more than four million members paying for a premium account,³⁸ X makes users can pay for a blue checkmark,³⁹ and Meta offers paid verification on both Facebook and Instagram.⁴⁰ Certification benefits for users include early access to new features

THE IDENTITY REFOCUS

and better access to support. In addition to the extra revenue from these recurring fees, platforms gain a knowledge that paying users are real people. This could lead to new advertising and brand partnerships opportunities, or potential future revenue as platforms expand into commerce, payments, and financial services.

Certification should also lead to safer environments for users and brands by cutting down on spam and impersonation. For instance, Google's Gmail has introduced its own process for brands to verify their domain names so that email recipients can see a checkmark against the company's email address and distinguish it from imposters.⁴¹

Another application of verification is better age-gating to prevent younger users seeing inappropriate content, with platforms like Instagram testing new ways to verify the age of their users.⁴² Tighter age-gating makes it possible for platforms to allow more adult content – TikTok now only allows over 18s to stream live⁴³ – and to accept advertising for products that are age controlled, for example, alcohol and gambling.

These examples of platforms doubling down on identity must serve as reminders for brands to take concrete steps themselves to improve their first-party data strategy as we enter a year when third-party cookies will likely be deprecated in Google Chrome.⁴⁴ Yet, according to research by dentsu Schema, only 55% of organizations globally do have a clear overarching data strategy.⁴⁵



What's Next?

While more social platforms will create premium subscriptions, newcomers to the ad business will strive to know their users better and become more attractive to brands by following the playbook of retail media platforms. Increasingly, the best content and features online will be reserved for signed-in users



PART 02

THE RACE TO MONETIZATION

TREND 7

MORE ADS FOR MORE RETURNS

Digital advertising spend more than doubled over the last five years and is forecast to reach a record high \$450.6 billion in 2024.⁴⁶ Yet, as the year-on-year growth is slowing to 6.2%, tech platforms are battling to increase their advertising revenue by introducing fresh formats and carrying more ad placements. Brands will have to balance these opportunities with risks to alienate audiences.



PART 02

THE RACE TO MONETIZATION

TREND 7

MORE ADS FOR MORE RETURNS

More **ads** per **pixel**

Advertising remains the primary method of monetization for many leading platforms, such as Meta and YouTube. It is also a growing source of revenue for others, most notably Amazon, which has generated more than \$40 billion from advertising in the four quarters up to August 2023.⁴⁷ In the quest for revenue, platforms put more ads into their inventories with new placements emerging in the past year.

The search space, a \$158.7 billion opportunity in 2024,⁴⁸ is particularly sought after by social platforms. To monetize users' searches for content like recipes or beauty tips, Instagram has recently opened its search to ads, allowing brands to appear next to organic results.⁴⁹ TikTok quickly followed by launching its Search Ad Toggle to let brands become discoverable in user query results.⁵⁰ Furthermore, the rise of retail media as a category has brought ads

into new spaces, including commerce sites, ticketing platforms and delivery apps.

Ad format innovation seems to bear fruit for platforms, with Meta reporting a 34% year-on-year increase of ad impressions across its family of apps.⁵¹

The **explosion** of the ad-supported segment

Advertising on connected television (CTV) is forecast to experience a spectacular 32.2% growth in 2024,⁵² fueled by the rise of ad-funded video on demand (AVOD) and free ad-supported television (FAST), that let audiences experience the control of watching on-demand and the simplicity of watching broadcast TV, for free or at a reduced fee.

Leaders in the AVOD space are actively launching new formats, as illustrated by the

MORE ADS FOR MORE RETURNS

recent introduction of 30” unskippable ads in YouTube Select, a selection of channel packages that record 70% of its impressions through the TV screen.⁵³

The offering also becomes more dense, as major streaming players have entered the space to attract more subscribers through a lower price point, and almost every streaming platform now has an AVOD component. Netflix reported that, on average, more than a quarter of Netflix new users now choose the ad-supported plan when given the choice.⁵⁴

It should be highlighted that the rise of ad-supported tiers is not exclusive to video. Audible, Amazon’s audiobook platform, is testing ad-supported access to allow new users to listen for free with advertising.⁵⁵

A planning balancing exercise

These booming advertising opportunities offer new ways to engage audiences to brands. As part of the Attention Economy research program, a study conducted by dentsu with the AVOD platform Amazon Freevee has proved the potential of CTV to hold longer levels of attention (Freevee results were three times greater than broadcast TV norms) and to drive recall (+5% better recall than the dentsu norms).⁵⁶

Yet, more ads across the board means more advertising clutter, and it will be even more important for brands to dive into audience insights, invest in creativity, and operate careful media planning if they are to drive effectiveness and not oversaturate their audiences.



What’s Next?

As lucrative as it is for the platforms to constantly place more ads into more spaces, these new ads could hurt the user experience, as well as creating massive clutter for brands. Platforms will need to make sure that the balance remains acceptable to all stakeholders.

PART 02 THE RACE TO MONETIZATION

The race to monetization happening across platforms shapes the contours of an increasingly efficiency-driven media landscape in 2024. As marketers prepare themselves to navigate through this new reality, it is important they reflect upon the following considerations.

Adapt to the **changing media landscape**

Adapt your media planning to the new platform landscape, where main players become increasingly similar and advertising clutter is on the rise. Solutions such as dentsu attention prediction models help brands better plan, activate and measure their media investment based on attention to benefit from new advertising opportunities without oversaturating audiences. Consider growing high attention spaces such as gaming⁵⁷ and digital audio⁵⁸ to beat clutter and stand out.

Secure **data access**

Secure access to the people intelligence you need to achieve your marketing goals in a post third-party cookie advertising world. Consider clean rooms to allow for the connection between your first-party data, data from fast-growing media channels like CTV, and other qualified data sources to power more relevant advertising campaigns. Get your first-party data ready for analysis and transformation in your future generative AI endeavors by safeguarding its compliance, security, and quality.

Balance content **protection** and **discoverability**

Evaluate the trade-offs between the discoverability of your content and its protection from unapproved third parties including those collecting data to train large language models. If you opt for a protective stance, explore the emerging technical solutions to block AI-training crawlers with your IT team, and work with legal experts to understand the regulatory framework around scraping, which is likely to vary across markets.



PART **03**

**INTEGRITY
ECONOMICS**



PART 03 INTEGRITY ECONOMICS

As we navigate a world of temperatures rising to dangerous levels, mounting concerns on AI's effects on society, and increasingly polarizing events and culture wars, growth cannot only be defined as immediate financial performance for brands. It encompasses their wider contribution to society.

Three of four CMOs (78%) now agree that, in a world where climate volatility creates economic volatility,

there is no longer a disconnect between what is good for society and what is good for business.⁵⁹

Brands can address demands for social justice and fair representation by actively looking to include diverse voices and reducing bias, preserving natural resources by taking concrete steps toward social impact, or contributing to build safer online spaces.

TREND 8

THE NEW FACES OF GROWTH

With media consumption becoming increasingly diverse and personal, brands must adapt to reflect the needs and identities of audiences and stay relevant.

TREND 9

SAFER, BETTER, FASTER, STRONGER

Amid a fast-moving digital landscape, new developments in brand assurance aim to create safer environments for both people and brands.

TREND 10

MORE ATTENTION, FEWER EMISSIONS

As brands implement carbon media efficiency strategies, optimizing for attention should lead to decarbonization through optimized and improved impact.



PART 03

INTEGRITY ECONOMICS

TREND 8

THE NEW FACES OF GROWTH

Across the globe, as our societies become more diverse, people increasingly think this diversity makes their country a better place to live, as found by Pew Research Center.⁶⁰ In light of this structural evolution, brands should actively support diversity to grow in 2024 and beyond.

THE NEW FACES OF GROWTH

Emerging media **usages**

Media usage reflects this societal trend toward diversity. People can now set their own TV schedules and choose to follow their preferred topics, giving rise to a *Generation P* whose media consumption is personalized to their diverse, unique lives.

In the UK, the number of TV programs attracting more than four million viewers declined by more than 50% in less than ten years,⁶¹ as viewers choose from a wide range of sources the ones that resonate the most with them. In music, recent research points to *glocalization*,⁶² where the rise of global streaming platforms correlates with a strengthening of local music. While musical hits in English used to dominate charts across countries, listeners now flock to local language artists. Forms may be global (e.g., rap music), but the expression is local (e.g., German rap music).

Responsible **technology**

As media usages become increasingly diverse, brands must reflect this evolution in how they approach their campaigns if they are to appeal to audiences. This includes acting to reduce potential bias in the technology they use.

Models may be trained on datasets that contain human biases, for example, in representation of minorities in images that some groups use, and therefore, these models' outputs become biased themselves. This highlights the necessity for representation throughout the training and technology development. Ensuring diversity in marketing and product development teams and questioning tech partners on their training practices is key.

Innovative technology can also be used to challenge traditional narratives and change attitudes, as illustrated by Orange's

THE NEW FACES OF GROWTH

recent commercial for promoting the FIFA Women's World Cup.⁶³ While the ad begins with highlights from the France men's national team, it then reveals to the audience that the footage they have just watched had been edited using deepfake technology – men's team players' faces being superimposed to actual highlights of the women's national team. Doing so, the commercial aimed to demonstrate that viewers' sexist misconceptions were baseless as the women's competition is just as riveting and spectacular as the men's. This is a strong example of technology being used to encourage more inclusive views across society.

More diverse media models

Diversity can be reflected in media plans, too. As brands are being pulled into culture wars, 64% of CMOs now express concerns that their media spending may inadvertently contribute to political polarization, and 81%

agree brands can use budgets to amplify independent and diverse voices, according to research by Dentsu Creative.⁶⁴

Yet, in the push towards reach and cost efficiency, some smaller, more niche platforms such as minority-owned media can fall by the wayside, where they are more at threat from the recent economic squeeze. Through their media investment, brands can recognize the unique value they offer to audiences and to the long-term sustainability and diversity of the media ecosystem.

Revenue-sharing models that support content creators and users should also be on brands' radar. Emerging platforms such as WeAre8 or Good-Loop that reward engaged users by sharing a percent of advertising revenues⁶⁵ or let them give to charity in exchange of ad viewing⁶⁶ illustrate new media models that offer alternative growth routes to brands.



What's Next?

By taking active steps to identify and mitigate bias in their AI initiatives and supporting diverse voices through their media budgets, brands will not only do good today, but also invest in their future.



PART 03

INTEGRITY ECONOMICS

TREND 9

SAFER, BETTER, FASTER, STRONGER

The year 2024 will be an exciting one for advertisers, with major events such as the Paris Olympics and Paralympics taking place. It could also be a turbulent year, with key elections across all regions that may increase polarization. In that context, developments in the brand assurance space should help companies better protect their reputations and brand equity.



PART 03

INTEGRITY ECONOMICS

TREND 9

SAFER, BETTER, FASTER, STRONGER

AI plays **cat** and **mouse**

With more than 73% of global digital ad spend forecast to be bought programmatically in 2024,⁶⁷ fraud prevention should be at the top of advertisers' agendas to ensure the media spaces wherein they appear are the ones they bought.

Fraudulent websites, created to trick ad platforms into thinking they are legitimate but ultimately serve ads in a poor environment for audiences, have raised concerns among advertisers for some time. Unfortunately, the advent of generative AI and its capacity to create content at a low cost has been embraced by fraudsters. NewsGuard, a company that tracks news websites' trustworthiness, found a number of ads⁶⁸ that had been placed onto Unreliable Artificial Intelligence-Generated News websites (UAINs) – sites automatically generated with the specific aim of attracting advertising revenue, while having no journalistic quality or merit. NewsGuard

has already identified hundreds of UAINs in 14 languages, including Dutch, Arabic, and Portuguese.⁶⁹

Conversely, technological developments offer new solutions for known issues. For instance, while the explosion of user-generated content has driven substantial media consumption, it has become increasingly difficult for the platforms to monitor and moderate this content, despite colossal investments.

This is where AI and large language models could help create safer environments for users and brands. OpenAI has announced that its GPT-4 model can help platforms better moderate content through more consistent content labelling, faster feedback loop, and a reduction of the psychological stress endured by human moderators from exposure to harmful content.⁷⁰ AI tools have also been created by platforms like Meta to better detect hate speech and quickly act against it.⁷¹

SAFER, BETTER, FASTER, STRONGER

Supervision and adaptability are paramount

Automated technology alone cannot be touted as the solution for complex brand safety and brand suitability concerns that require nuance and human appreciation.

For instance, keywords blocklists, a widespread practice across advertising, can have a negative impact when used without proper supervision. These lists scan publishers' URLs and exclude the ones featuring flagged keywords from a campaign. Although blocklists are an effective way to prevent brands from appearing next to inappropriate content, they exclude pages solely based on the word presence in the URL without understanding the context of the content. Consequently, lists of broad keywords can have unintended but damaging consequences.

For example, brands may add words like gay or lesbian to blocklists to avoid the possibility of content around sexuality, but that may also exclude LGBTQ publications from campaigns. This could prevent these publications from monetizing their traffic, which could threaten their business model, which in turn could deprive their audiences of legitimate sources of news, and ultimately limit brands' own ability to reach these audiences.

To avoid such undesirable scenarios for people, publishers, and brands, new blocklist best practices are emerging, such as reducing reliance on overly broad blocklists, including more human supervision to prevent bias and exclusion of specific social demographics, and more frequent revisions to keep in synch with societal changes.



What's Next?

Facing new challenges propagated by technological development, the advertising industry will respond with new solutions to keep brands safe. Just as platforms created their own walled gardens, agencies will maintain their own networks of secure inventory providers and collections of content in specific genres from trusted partners.



PART 03

INTEGRITY ECONOMICS

TREND 10

MORE ATTENTION, FEWER EMISSIONS

NASA's finding that July 2023 was the hottest month on our planet since 1880⁷² is a bleak reminder that the climate crisis persists and compounds pressure on companies already facing economic challenges. Brands can implement their carbon media efficiency strategies and better align business effectiveness with sustainability through new solutions in 2024.



PART 03

INTEGRITY ECONOMICS

TREND 10

MORE ATTENTION, FEWER EMISSIONS

Consumers look **beyond** promises

Although an increasing number of companies are pledging to head toward a net zero future, consumers want concrete actions today. According to dentsu research,⁷³ 55% of US and Canada consumers expect sustainable businesses to reduce their carbon emissions now, but believe those companies are falling short of expectations.

As brands look for concrete opportunities to be more carbon efficient, they must identify their carbon emitting activities accurately. For instance, the core emissions scope of media activities encompasses media campaign planning, ad data storage, ad routing and distribution, and consumer use audience devices. It is important for brands to define the right scope for media to set the right goals and confidently measure the carbon footprints of their campaigns.

The media supply chain **reinvents itself**

Advertisers aiming to reduce – not just offset – the carbon generated by media activities can count on booming carbon inssetting innovations across the channels and infrastructure supporting ad delivery.

From a trading perspective, advertisers can explore zero marketplaces that only include media owners with science-based targets that support media decarbonization. From a technical perspective, they can look to optimize the creative configuration, for example the file size or second length, but also to leverage solutions such as dentsu Attention Ads Labs to analyze the ad creative effectiveness and deliver the same impact more concisely. They can even consider alternative solutions to ad serving such as ad streaming which reduces load time – and thereby carbon emissions – of digital creatives without file size restrictions.

MORE ATTENTION, FEWER EMISSIONS

Decarbonizing through high impact

Alongside these carbon-reduction tactics, we expect a media planning shift in 2024, supported by the increased sophistication of media carbon calculators, to help campaigns achieve both their media carbon optimization goals and brand objectives.

Marketers can now use media carbon calculators to understand whether a campaign type (e.g., brand or performance) leads to a disproportionate number of emissions, whether ad emission shares and ad spend shares are unbalanced across the plan, or whether their media guidelines lead to increased emissions from some channels.

This sophistication will lead to new, better metrics. Marketers can look beyond the absolute carbon emissions of channels, vendors, and formats, to consider their tons of CO₂ equivalent (tCO₂e) per media metric (e.g., per reach point). That should help them

understand the implications of planning decisions on media carbon efficiency and media effectiveness.

Building upon the correlation between attention with recall and brand choice, dentsu hypothesize that optimizing for attention will reduce spend on inventory with little audience value – sometimes called the “long tail” – and, doing so, reduce the carbon footprint of campaigns. Initial results suggest the ability to identify programmatic inventory that offers both greater attention and reduced carbon, which could open perspectives for future custom bid algorithms. Ultimately, bringing attention optimization and carbon efficiency strategies together could lead toward the establishment of a Carbon Cost of Cognition currency to measure the carbon cost of delivering recall (i.e., CO₂ cost/Effective attention).



What's Next?

As awareness grows about the climate impact of our industry, progress in media carbon emissions measurement and attention research will create an exciting potential to build campaigns both effective and kind to the environment.

PART 03 INTEGRITY ECONOMICS

It is clear that economic gains and societal responsibility are complementary rather than competitive goals toward sustainable growth. In 2024, marketers should keep in mind some important considerations.

Reflect the **diversity** of **today's society**

Evaluate how your media efforts reflect the diversity of people and their media usages. With 77% of consumers now expecting brands to ensure their use of AI-based applications do not propagate existing biases and systems of inequality,⁷⁴ representation must be integrated into the training data to mitigate bias in AI and develop more equitable marketing campaigns. Review how your current investments support underrepresented voices to foster a more inclusive media ecosystem.

Build a multi-layered **brand assurance strategy**

Combine ethics, technology, governance, and adaptability in your approach to brand assurance. Select accredited technology partners and make sure you build the right governance to enforce brand assurance rules with discernment, particularly when operating across countries with different cultures and values. Adaptability is key, both in the short term to react promptly to unforeseen events, and in the long term to account for societal changes.

Define your **carbon media efficiency plan**

Aim to reduce the carbon generated by your campaigns, from planning to execution, rather than offsetting, which does not solve the root cause of emissions. This requires accurate measurement to set goals and track progress. Calculators like dentsu's Media Carbon Calculator can help you understand the carbon footprint of your media plans and initiatives (both online and offline) and make more informed decisions to establish the optimum media mix to balance sustainability goals and business objectives.

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MEDIA

THE PACE OF PROGRESS
2024 MEDIA TRENDS

TRENDS

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