

2025 Media Trends

01.28.2025

Today's Hosts



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“Change is the only constant in life. One’s ability to adapt to those changes will determine your success in life.”

– Benjamin Franklin

What to expect in 2025?



*Shifting
Behaviors*



*Evolving
Media*



*Future
Redefined*

Today's Presenters



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Social and
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The Future of Data

- 01 SOCIAL & INFLUENCER
- 02 SEARCH
- 03 RETAIL MEDIA
- 04 VIDEO
- 05 THE FUTURE OF DATA
- 06 FINAL THOUGHTS AND Q&A

Social & Influencer

Recent Headlines



TikTok Ban

1/17/25: The Supreme Court upholds the federal law banning TikTok in the U.S.

1/19/25: TikTok shuts down operations in the US

1/20: Executive order signed giving TikTok owner, ByteDance, a **75-day extension to sell a stake in the platform or reach a deal with the US administration.**

TIMING: If ByteDance does not find a US company to take an 80% stake **within the next 75 days**, it will again be banned in the US.

If there is no sale prior to end of 75 day extension, all ad campaigns will be paused preemptively and contingency plans recommended on brand-by-brand basis.



Meta Update

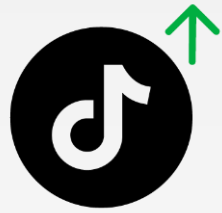
Meta moving to **community-based flagging** approach vs. current third-party fact checking system.

This update should allow users additional control over what they see in their Facebook, Instagram, and Threads feeds. Meta is expected to evolve platform policies throughout first half of 2025.

TIMING: Implementation is expected within the next 30-60 days.

No advertising policies to be adjusted as part of this policy change, as this policy is focused on organic content.

SOCIAL AND INFLUENCER



TikTok Popularity Broadening



Time spent on all platforms continues to grow, with TikTok in the lead



Social Commerce Growth Sustains



Consumers look to social media to research and purchase products

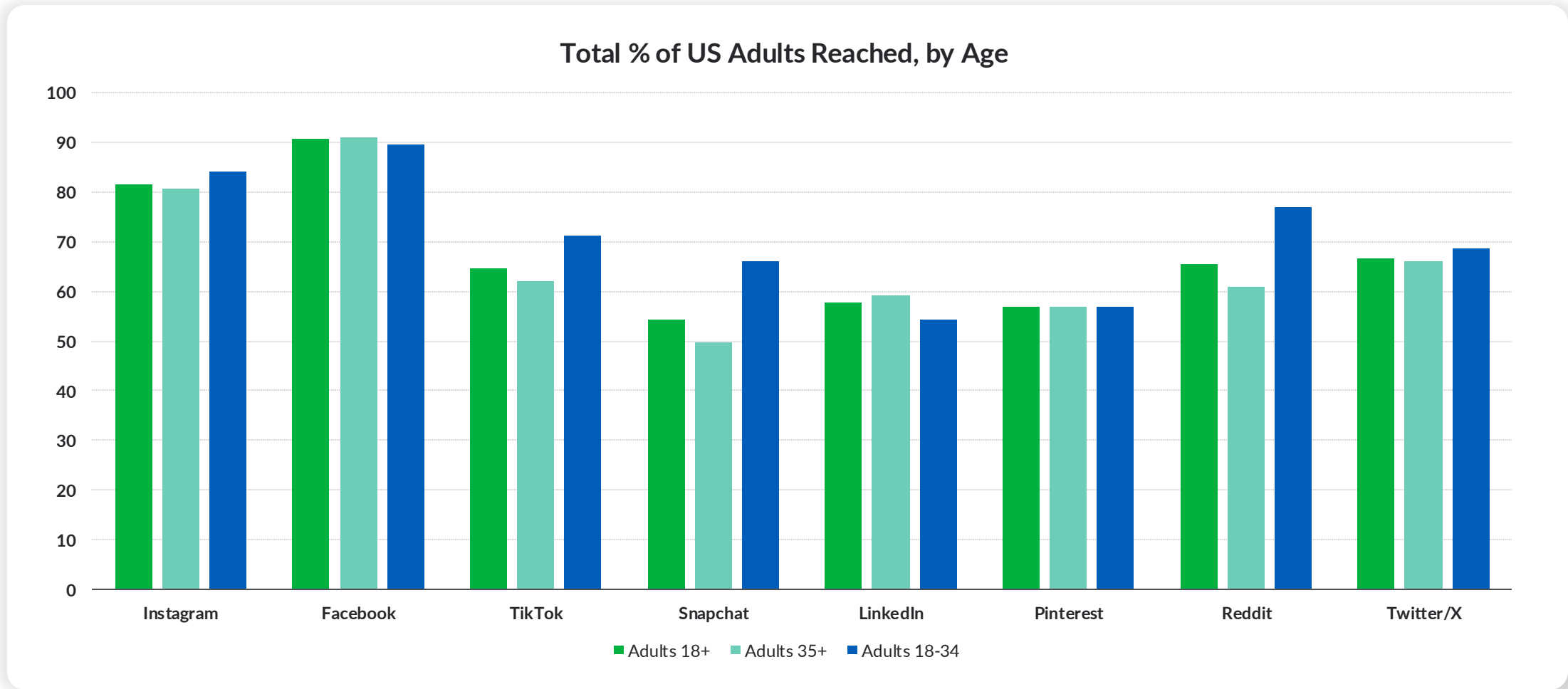


Emerging Strategy & Tech



The evolution of influence through UGC and AI

Facebook & Instagram maintain highest reach across age groups

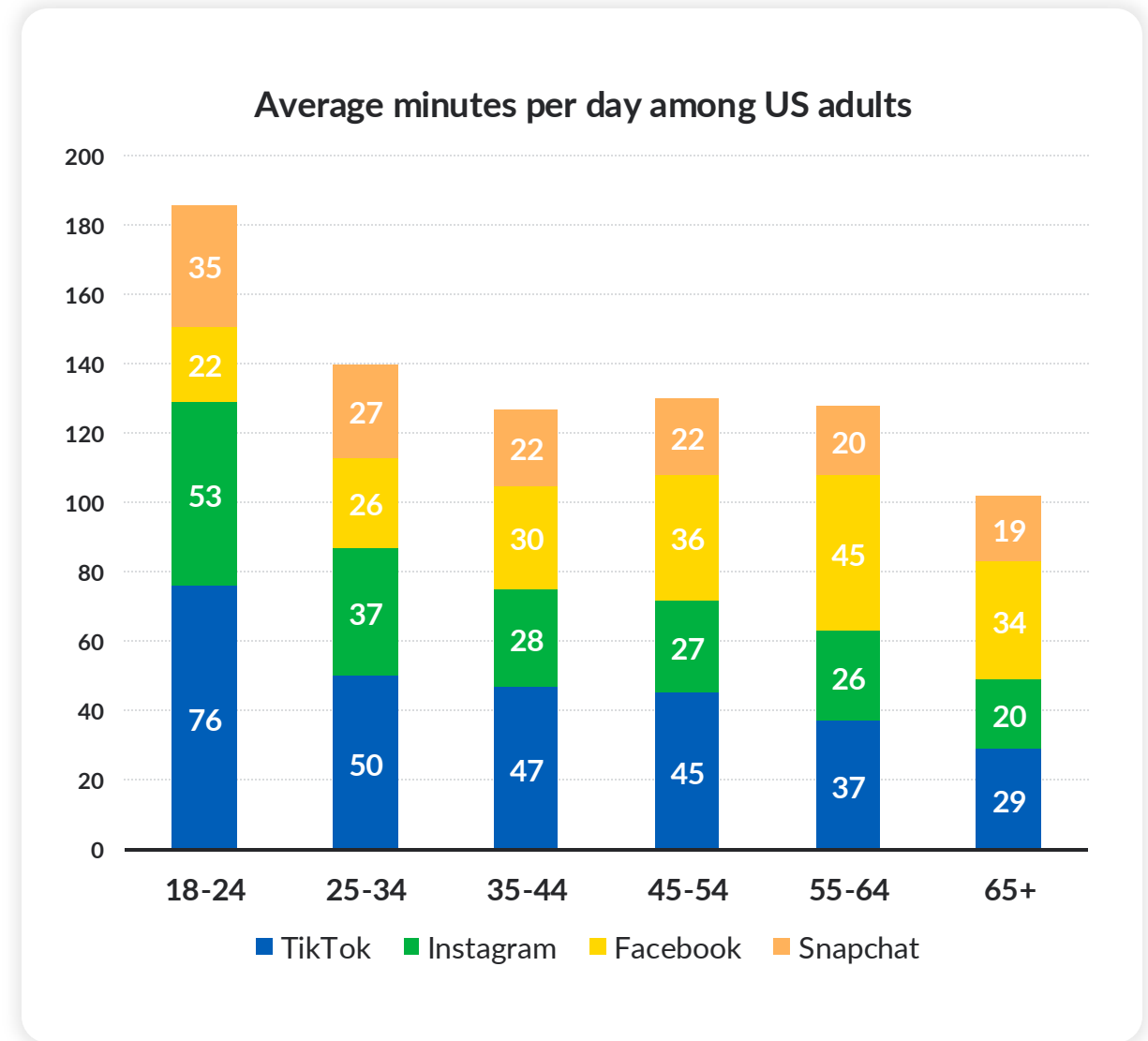


Source: The Nielsen Company 2025

However, time spent with Tik Tok is substantial

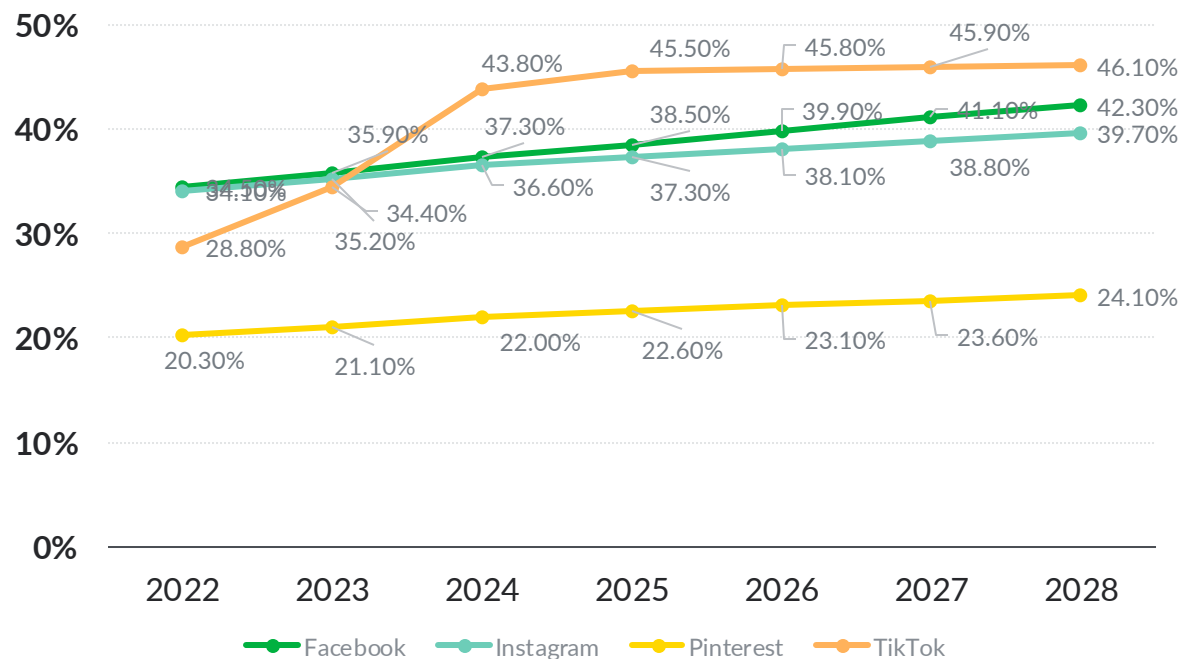
- Gen Z's 76 minutes of daily TikTok usage exceeds that of Facebook & Instagram combined.
- Additionally, A25-54 now spend more than a third of their social time on TikTok.
- Facebook & Instagram combined usage still exceeds TikTok for all age groups 25+, illustrating Meta's continued importance.

Source: eMarketer "Social Time Spent by Generation" March 2024

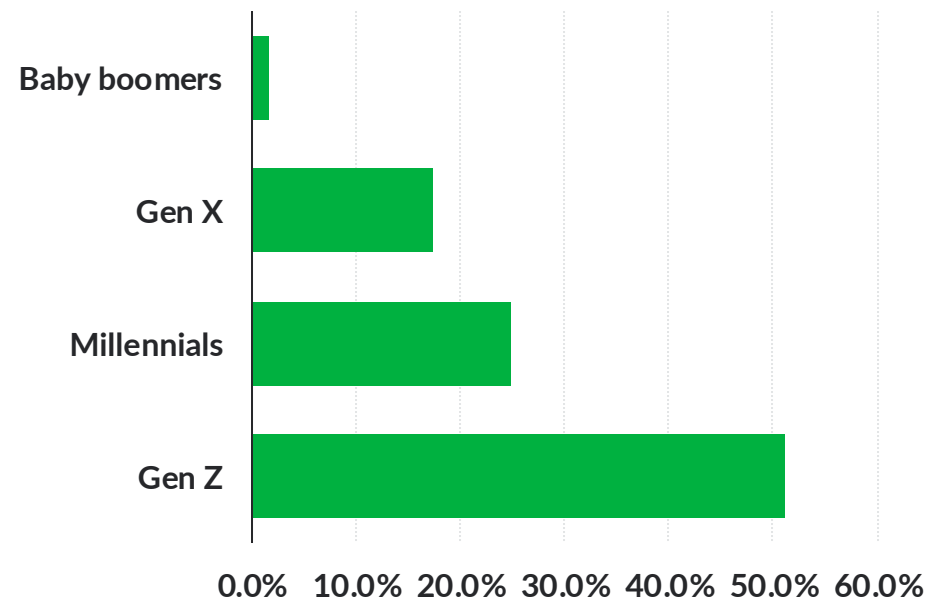


In-platform Social Commerce continues to rise

% of US users of each social network who made a purchase on the platform, 2022-2028

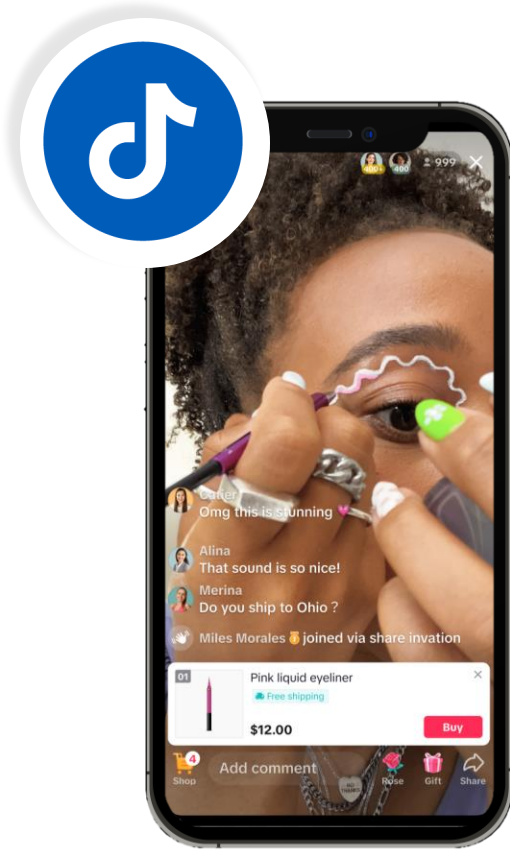


% of US marketplace buyers who made a purchase on TikTok shop, by generation, April 2024

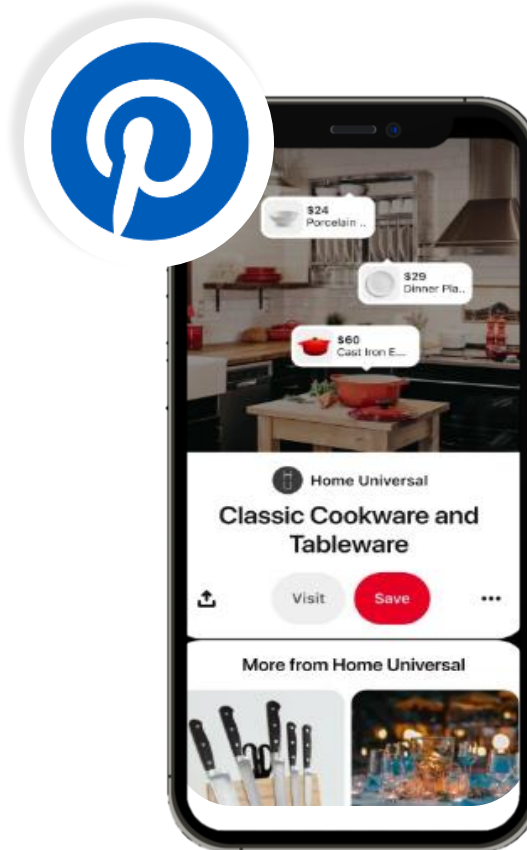


Sources: eMarketer "TikTok Will Convert Over 40% of US Users into Buyers" Nov 2024; CMS Wire "10 Social Media Trends You Can't Ignore," 2024; Pinterest Business, 2024; The New Consumer "TikTok Shop is Huge. Will it Last?" Jan 2024

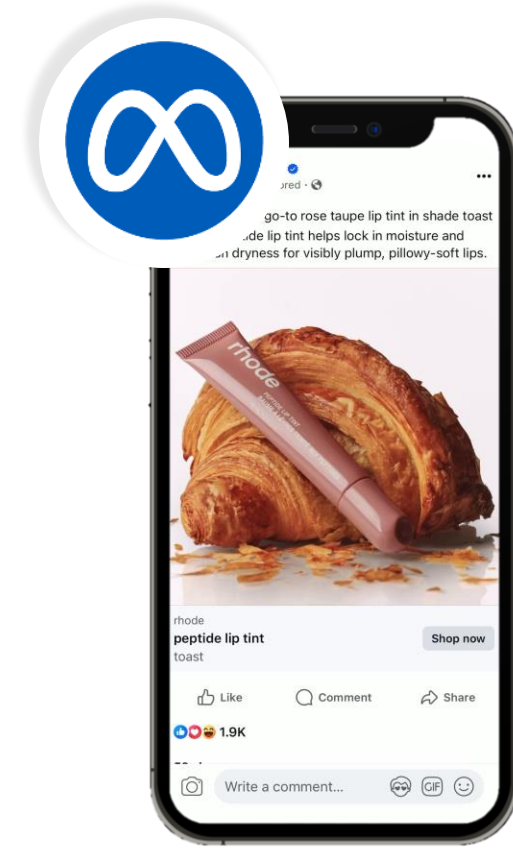
Shopping ads are expanding across platforms



Video Shopping Ads
Live Shopping Ads
Product Shopping Ads



Shopping Ads
Catalog Ads



Shopping Ads
Dynamic Product Ads (DPA)
Dynamic Ads for Broad Audience (DABA)
One-Click Multi Retailer (OCMR)

Creators are actively driving lower-funnel sales actions

67%



of US social users are at least somewhat likely to *research products on social media* before making a purchase.

50%



of actions taken across affiliate channels *are attributed to creators*

80%



of marketers now *track sales* generated by influencer campaigns

94% of social media users who buy products promoted by influencers do so on Amazon.

The evolution of Influence & Personalization through UGC

UGC creators prove that – with authentic, relevant content – anyone can influence purchase decisions.



➔

What is user-generated content (UGC) and influencer-generated content (IGC)?

- Any form of content posted by creators to social media, and reshared by a brand on their own page.

Brands leveraging creators to bolster their content

87%

of businesses reported increased sales through the use of UGC

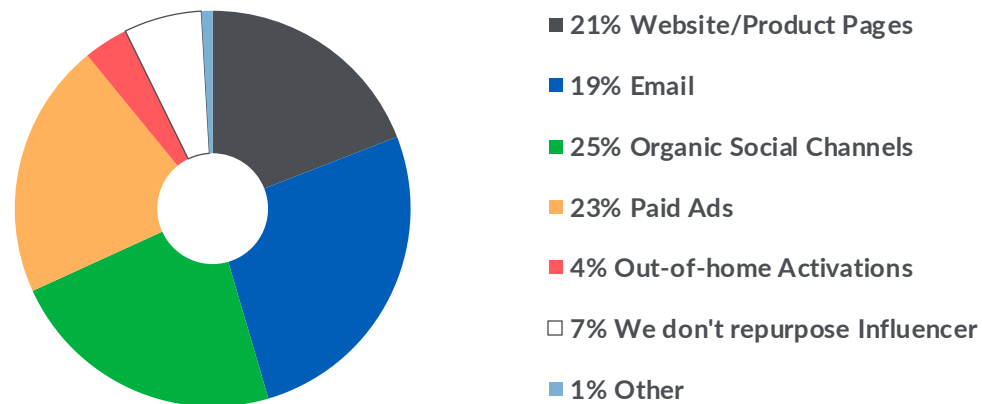
94%

of brands believe creator content drives more ROI than traditional digital advertising, up from 74% in 2023

Sources:

- Aspire "The State of Influencer Marketing 2024" August 2024
- CreatorIQ "The State of Creator Marketing 2024-2025" October 2024
- Hubspot "Why Social Shopping Could be the Future of E-Commerce" October 2024

How marketers repurpose influencer content across channels

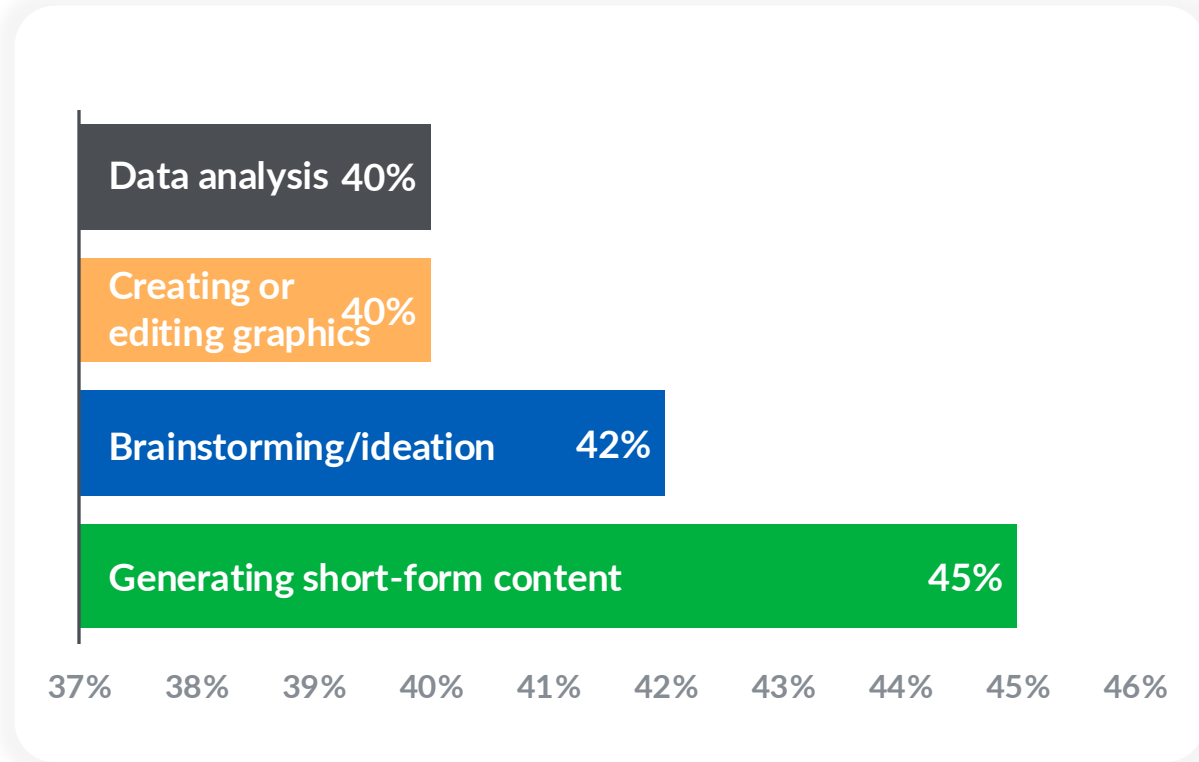


How does influencer-generated content perform when compared to your other creative?



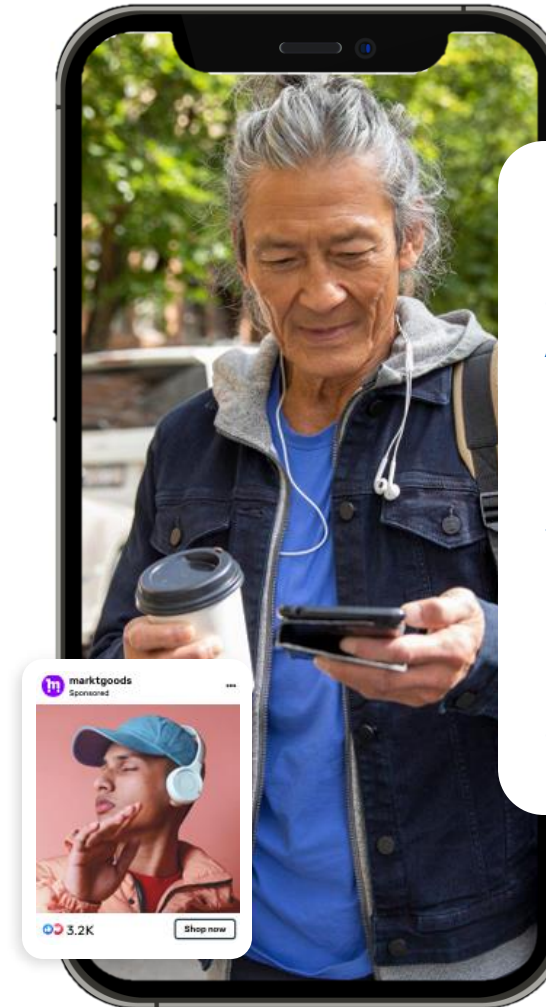
Emerging Technologies & AI

91% of brands implementing influencer marketing use AI for tasks like content creation and data analysis.



Sources:

- CreatorIQ report "The State of Creator Marketing 2024-2025" October 2025
- Influencer Marketing Hub "How AI is Transforming Influencer Marketing" Jan 2025



LinkedIn, Pinterest, and Meta all offer AI solutions to optimize the value of every ad impression, incorporating AI for automatic bidding, creative enhancement, budget allocation, and more.

Emerging Platforms



Threads

Developed by Meta, users log in using their Instagram accounts to share text updates and join public conversations.

Currently, advertising is not offered on Threads, but this is expected to change in the near future.

Launched July 2023



Bluesky

Developed by former Twitter CEO Jack Dorsey, users can post updates, share images, and engage in conversations while maintaining control over their own data.

There are no plans to offer advertising on Bluesky at this time.

Launched February 2024

Potential TikTok Alternatives



RedNote

RedNote is considered China's version of Instagram with a layout similar to Pinterest and a focus on travel, makeup, fashion, and shopping.

App has gained hundreds of thousands of new users in the last two weeks as TikTok users search for a new platform.



Lemon8

Like TikTok, Lemon8 is a ByteDance-owned app which includes features that resemble other short form video apps.

App could grow in popularity pending the outcome of the TikTok ban.

NOTE: While neither platform is currently impacted by a potential Tik Tok ban, both could face similar restrictions if they do not divest from Chinese ownership

Key Takeaways

Social Media Usage,
Commerce, & Platforms
are Evolving



Social media usage and commerce continue to rapidly evolve with many social platforms becoming the lead search engine for product research, and shopping integrations allowing for seamless purchasing. With TikTok's fate undetermined, new social media landscape will continue to unfold.

Influencers,
UGC, and ROI
impact



Influencers and User-Generated Content drive purchase decisions and ROI, proving authentic, relatable content is reshaping how brands connect with consumers and influence purchase behavior.

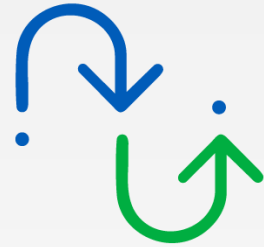
New AI and
platforms continue
to shape social
advertising's future



Emerging trends, technologies, and platforms shape the future of social advertising. AI continues to evolve tools for creative optimization, and new platforms and shopping integrations are gaining traction, potentially playing pivotal roles in future advertising strategies.

Search

Paid Search



Evolving Search Landscape



Generational shifts in search behavior



AI Impacts Users & Industry



Search facing significant disruption

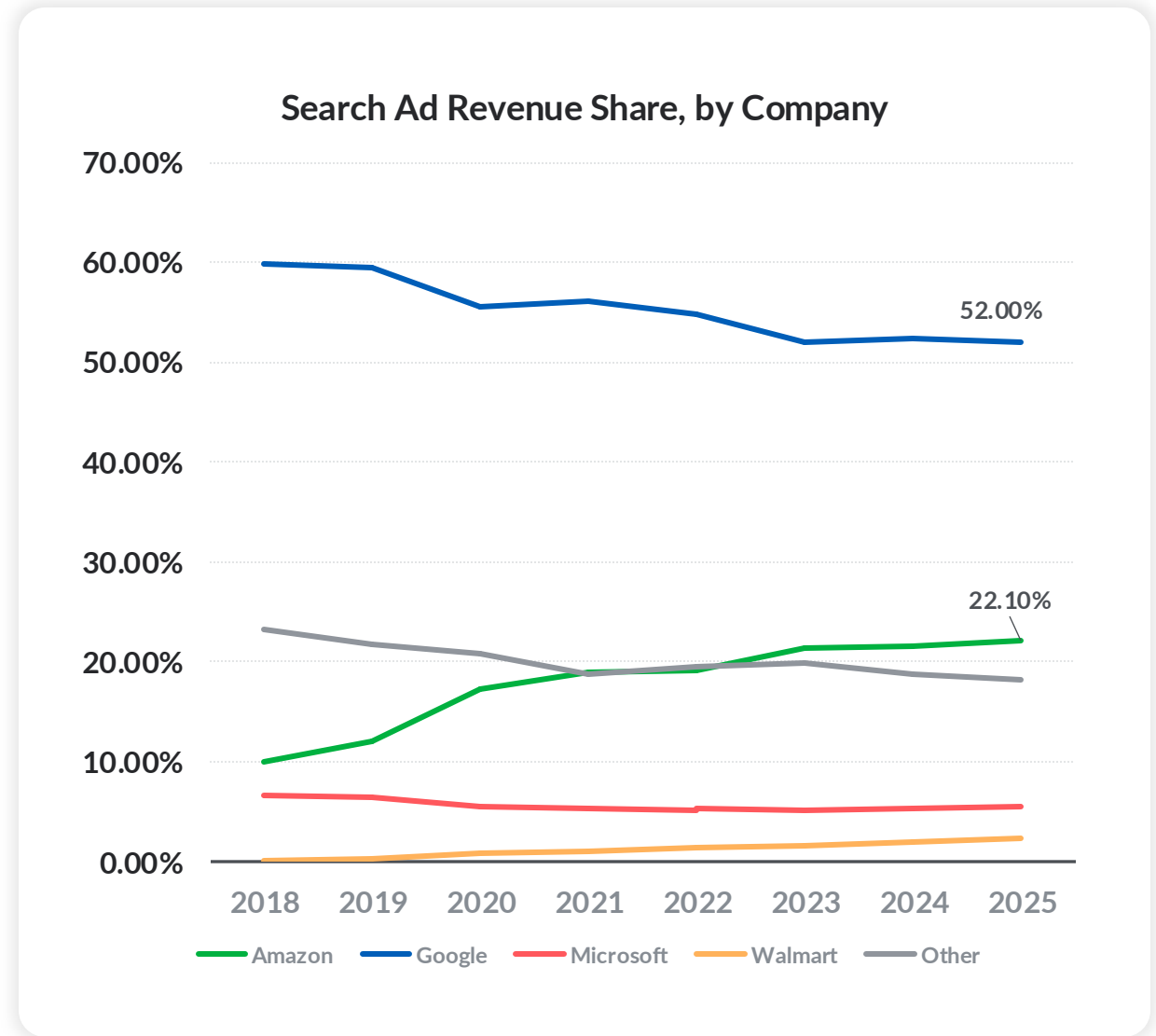
Google's Search is Still Dominant, but Declining

Google still garners 52% of the total search advertising market, but has dropped from 60% since 2018.

Retailers such as Amazon and Walmart continue to increase their share YoY, with Amazon expected to increase their market share to 22% in 2025

Despite Microsoft being first to integrate AI into its search platform, Bing, they still haven't gained market share

Source: E-Marketer Forecast, November 2024



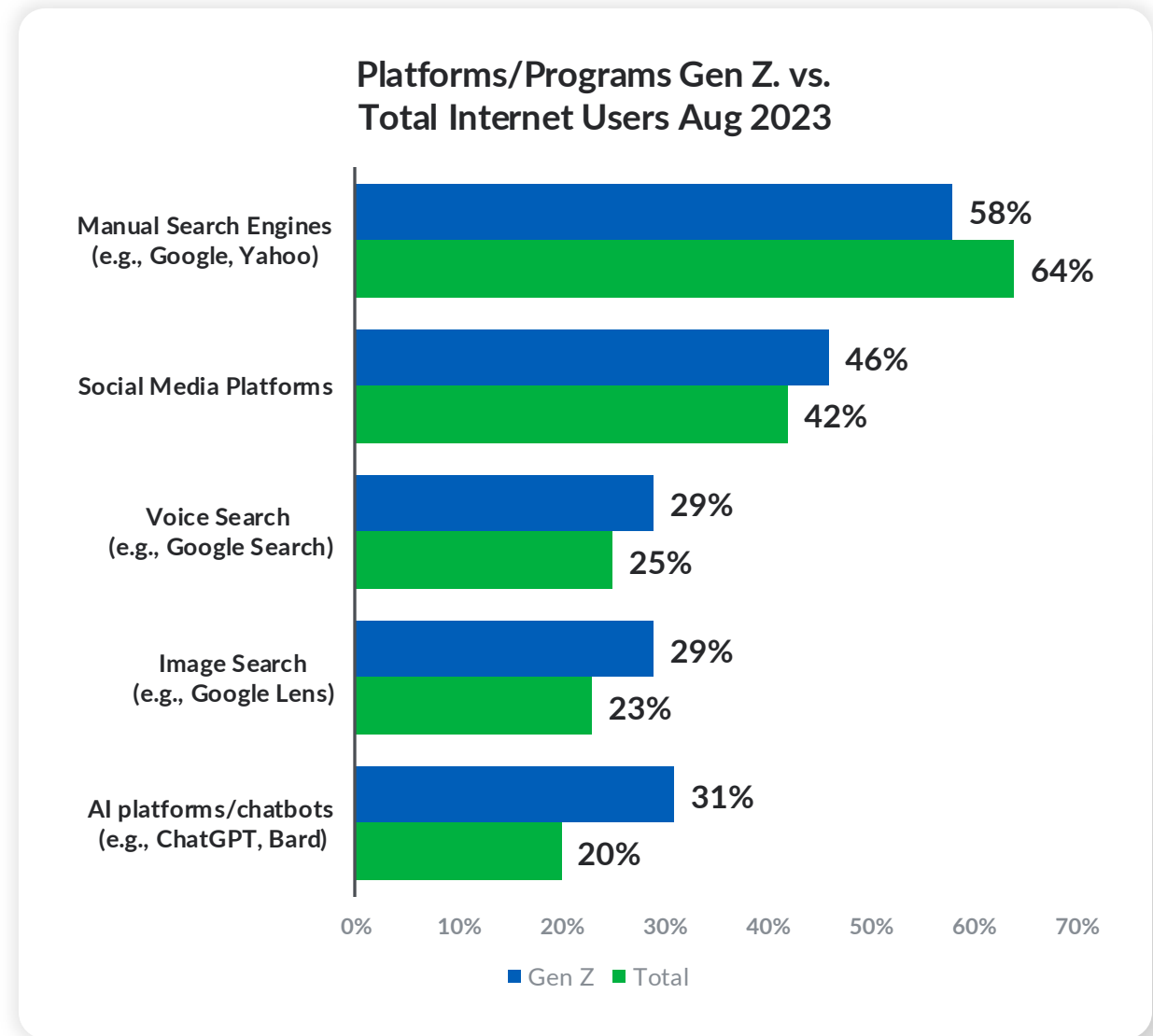
User Behavior is Changing across Age Groups

All age groups still rank Search Engines first for finding information online, but age cohorts have different preferences in starting point/platform.

Gen Z (ages 13 to 28) is more inclined to use social media than other generations as well as other products (such as voice and image search)

AI platforms continue to grow in interest with Gen Z leading the way in usage across products such as ChatGPT, Bard and Perplexity

Source: GWI, "2024 Global Media Landscape Report", March 2024

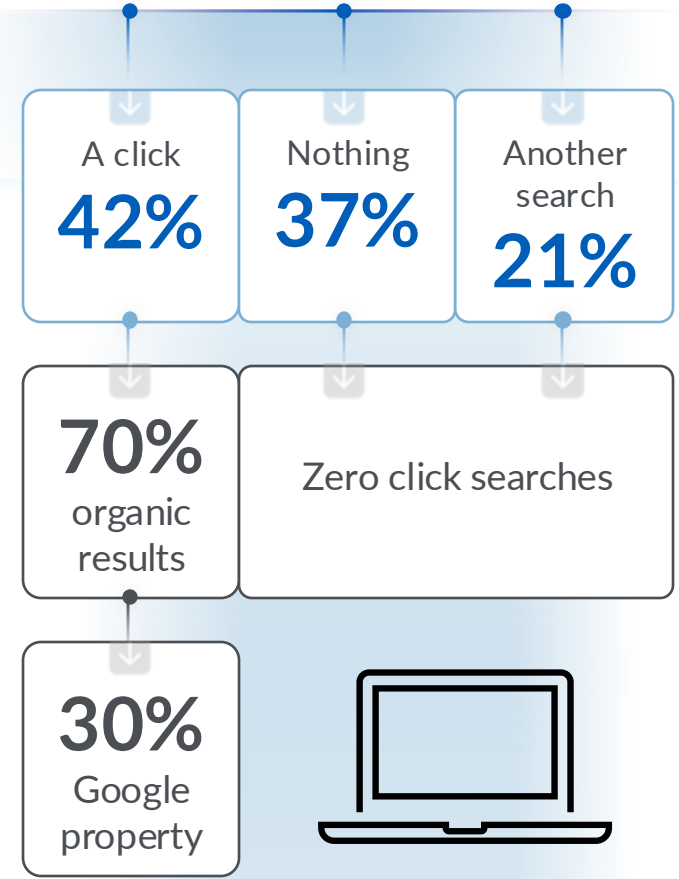
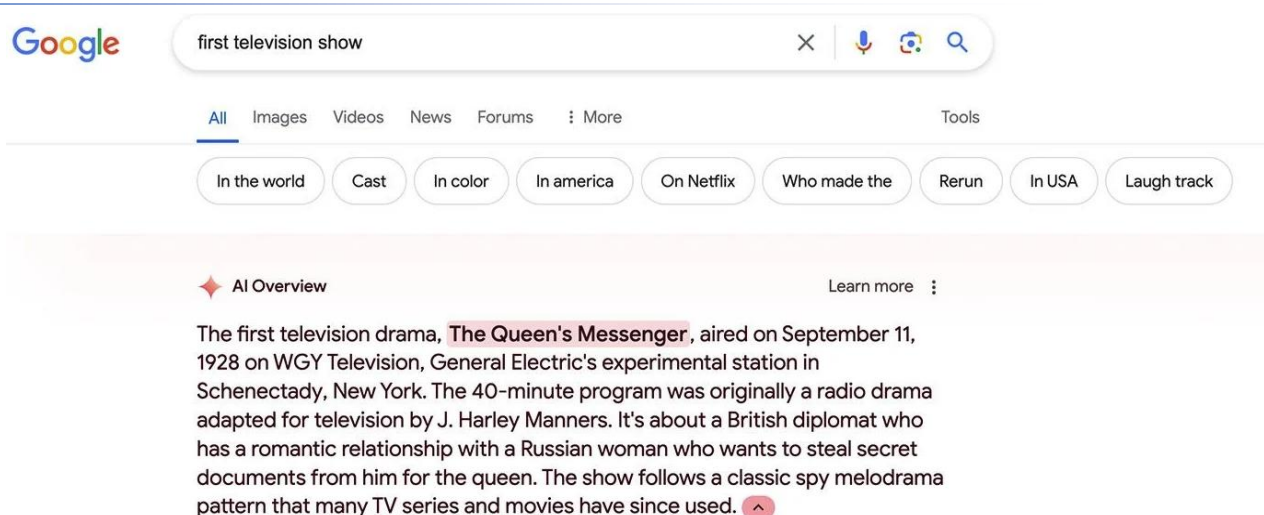


Google's Changing Ecosystem

ChatGPT and other LLMs have significantly disrupted search and pushed Google towards a future with AI integrated into every search query.

In 2024, the majority of Google searches did not result in a click.

Brands need to focus on providing a compelling offer in a landscape where high-value clicks are interrupted with in-grid, AI overview results.



AI-Driven Trends Reshaping Paid Search



AI-Driven Automation

Streamlines tasks like bid management and budget pacing, boosting efficiency



Smart Bidding Strategies

Optimizes conversions by adjusting bids in real-time based on various signals



Hyper-Personalization

Tailors ad content to individual preferences, enhancing engagement and conversions



Predictive Analytics

Forecasts trends and behaviors, enabling data-driven marketing decisions



Voice and Visual Search

Optimizes campaigns to accommodate these new search methods



AI Agents

AI assistants automate tasks like scheduling and idea generation, increasing productivity

Key Takeaways

Evolving Search Landscape



Google's search engine dominance is slowly declining as different user cohorts start their research process elsewhere, driving brands and agencies to broaden their skillset and expand their campaigns to other platforms.

Younger demographic groups are more likely to include social media platforms, voice search, image search, and LLMs as part of their customer journey.

Impact of AI & Tech



AI overview results are changing the way consumers search, leading to more searches without a click and a greater premium placed on high-value content.

Predictive analytics and generative AI tools allow brands to test more and optimize faster, providing rapid scaling opportunities.

Paid Results on AI platforms look inevitable, which will force brands to reevaluate their media mix in the near future.

Retail Media

RETAIL MEDIA TRENDS



Proliferation of Retail Media



Retail Media grows as non-eCommerce brands seek targeted audiences



Increased Competition



New entrants and expanding offerings fuel innovation



AI Integration in Retail Media



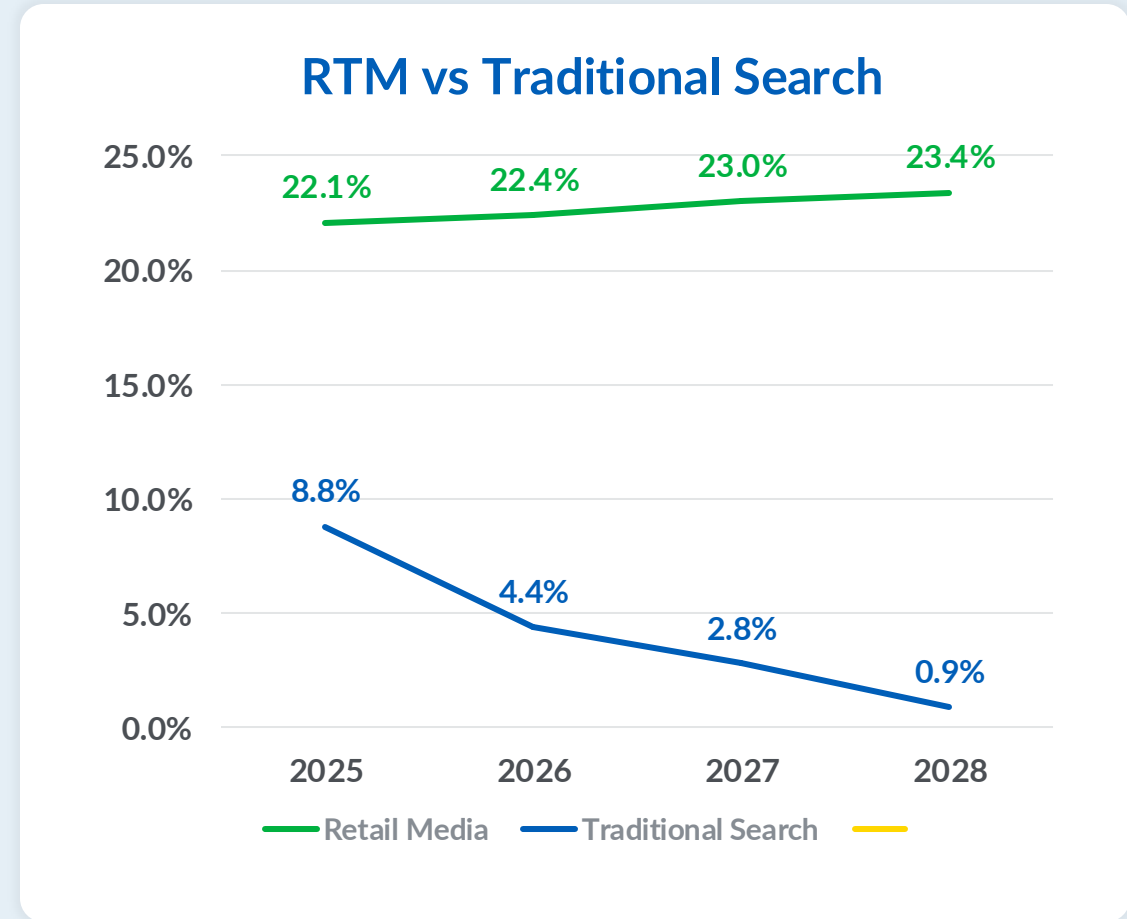
AI drives personalized, boosting engagement and satisfaction

Retail Media Search Spending Outpaces Traditional

US Retail Media is slated to grow by double digits over 4 years to reach \$76.83 billion

Non-RTM (or traditional) search will grow less than 1% in 2028 to \$106.96 billion

Over 59%, of retail marketers worldwide say advertising capacity and media investment in performance is most crucial to them



Projected % change in US retail media vs traditional search ad spending, 2025-2028

Source: "What's Shaping Retail Media Now" E-Marketer, August 2024

Non-Endemic Media – The Numbers

53% of brands have "often" utilized retail media networks that do not carry their product

Only 20% have not engaged a RMN in any capacity

Omni-channel retail media spend will account for ¼ of all US media spend by 2028 – providing new inventory for the 47% of companies that have not engaged as a non-endemic brand

How Are Brands Engaging with Retail Partners?

Q: Have you ever taken advantage of a retail media network offering at a retailer where you are not an endemic brand? (% of US brands)

Yes, we often take advantage of the data and media network offering at a retailer where are not an endemic brand

53%

Yes, but only if our products are listed as part of their marketplace offering

28%

No, but we have considered it, we just don't know how to engage

14%

No, we've never considered it

6%

Ad Spend Trends Towards Omni-Channel

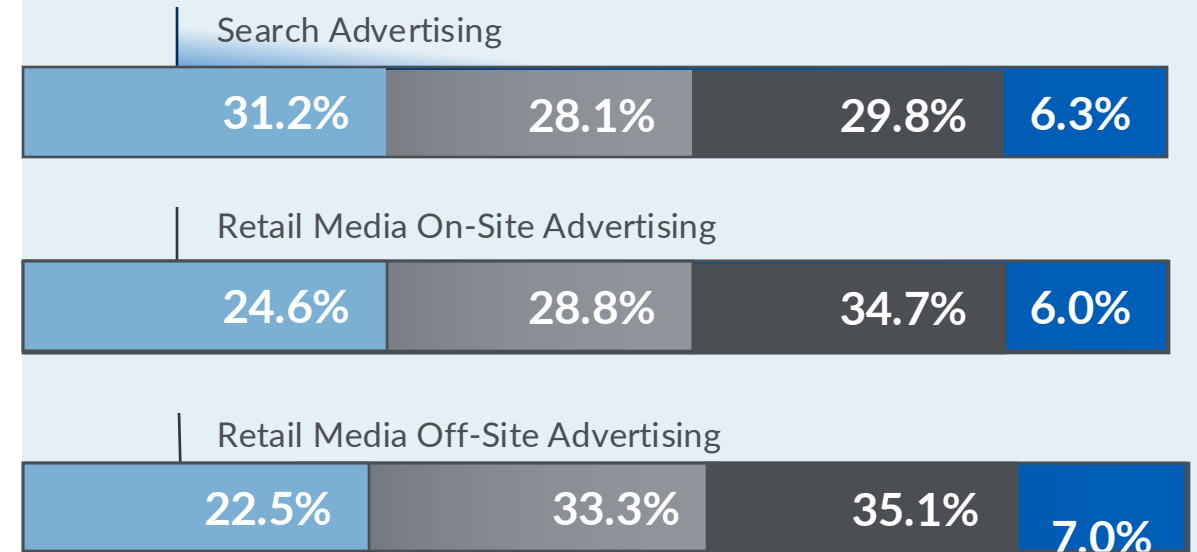
Ad spend has shifted from traditional to digital media, driving a fair portion of retail media ad dollars.

Brands are increasing investment across both digital retail and in-store media to better reach their audience.

Non-endemic brands continue to invest in retail media, seeking access to first-party consumer data.

Change in Retail Media/Search Advertising Among Marketers, Worldwide

% of E-Marketer Survey Respondents



- Plan to Increase Spending with Incremental Budget
- Plan to Increase/Shift Existing Media Budget
- Plan to Keep Spending the Same
- Plan to Decrease Spending

Challenges for Long Tail Retail Media Networks

New retail media networks have surged, fragmenting the ecosystem and complicating standardization for brands.

Brands have taken the plunge to **monetize their audiences/first party data** and build their own retail media network.



Fragmentation & non-standardization



Increased Competition



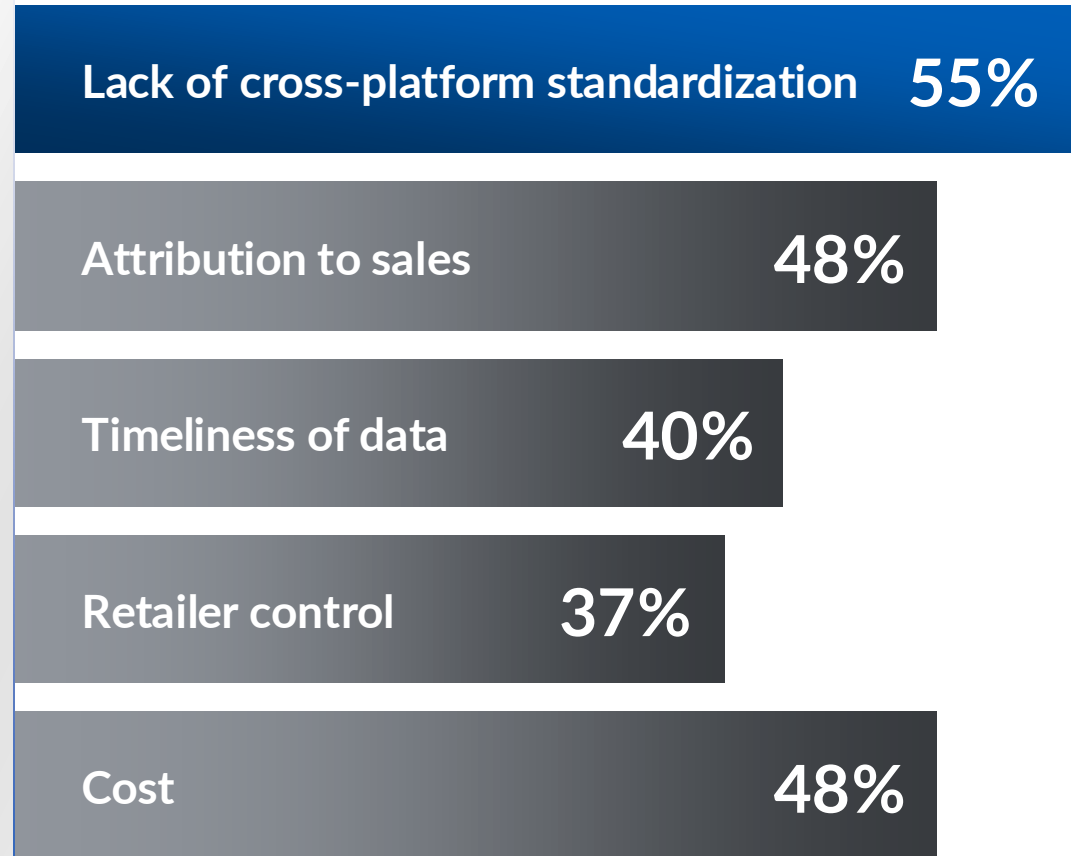
Technology Investments

Retail Media Measurement and Reporting Standardization

- **Need for Standardization:** Developing universal measurement frameworks and data-sharing protocols is a key challenge.
- **Proposed Models:** Standardization efforts (e.g., IAB models) exist but remain unresolved, complicating success measurement.
- **Advertiser Preferences:** 57% of US advertisers limit collaboration to four retail data partners, complicating engagement with smaller networks.



What are the biggest challenges for your organization related to retail media networks?



Source: "The State of Measurement in Retail Media" E-Marketer, January 2025

AI Impact on Retail Media

- Retail media standards will become more dynamic and adaptive to the needs of individual consumers.
- RTM advertisers expect to reduce operational costs by automating tasks and “getting more done with a small team”
- Agency decision makers want to see increased personalization when optimizing campaigns

Source: <https://www.emarketer.com/content/marketers-expect-ai-improve-retail-media-recommendations>

Expected impact of AI on retail media strategy according US Agency Decision Makers



Key Takeaways

Retail Media Growth Accelerates



Retail media spend is growing annually, both in-store and online – consumers now expect a cohesive omni-channel experience.

Increased RTM Competition



Mounting industry pressure will push retail media networks to adopt clear & concise omni-channel measurement standards – changing the landscape for RTM players trying to compete with Amazon & Walmart.

AI In Retail Media



AI algorithms analyze user data to predict preferences, allowing for tailored recommendations and content creation, leading to higher engagement and user satisfaction across online and in-store digital media.

Video

VIDEO



Fragmentation



The TV landscape has grown, presenting opportunities hidden among a diverse range of channel options.



AI and Personalization



AI-powered personalization is revolutionizing content, boosting engagement and precision for brands.























Sports



Traditional live sports viewership is declining, while streaming continues to pick up steam.

Streaming TV (OTT): Terminology You'll Hear

SVOD Subscription Video on Demand		AVOD Ad-Supported Video on Demand		FAST Free Ad-Supported Television		vMVPD Virtual Multichannel Video Programming Distributor		HYBRID PLATFORMS	
		  		    		    		     	
✗	Ads	✓	Ads	✓	Ads	✓	Ads	✓	Ads (depending on tier)
✗	Live	✗	Live	✓	Live	✓	Live	✗	Live
✓	On Demand	✓	On Demand	✗	On Demand	✓	On Demand	✓	On Demand

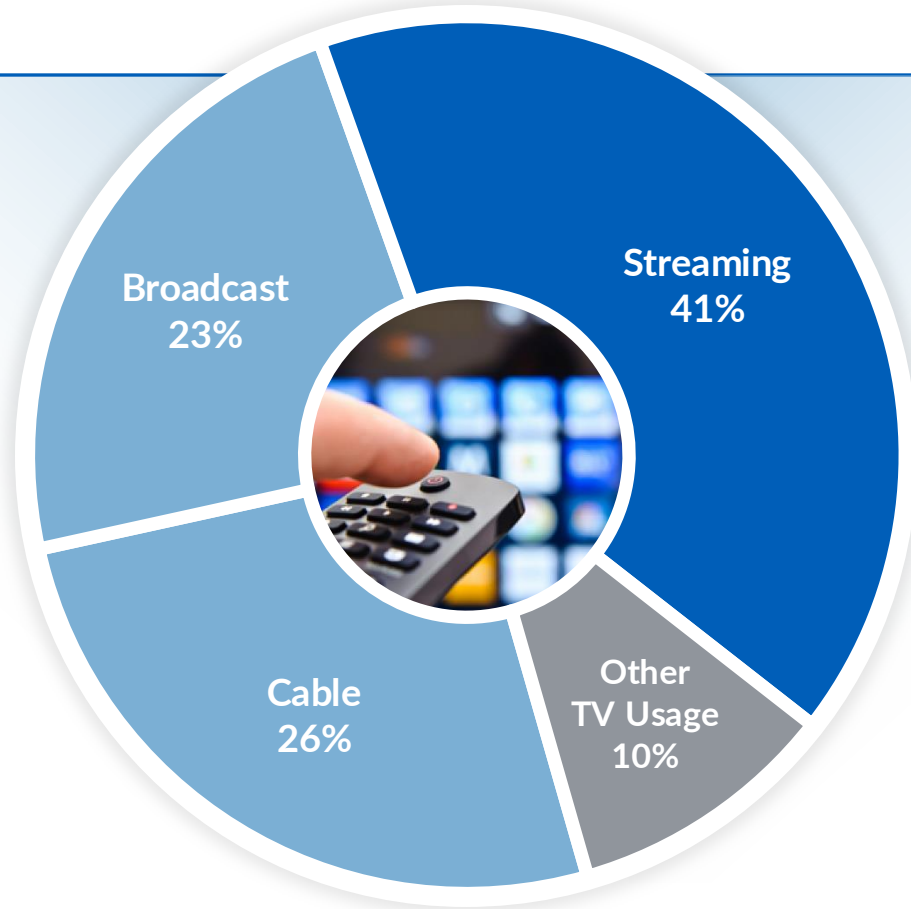
Video on the 'Big Screen' continues to fragment



Linear had less than 50% of TV-based video usage, with Cable slightly above Broadcast

CTV is outpacing both; rising from 36% to 41% of TV-based video usage in 2024

YouTube, Peacock, Tubi and Roku saw highest gains in share of time spent vs. '23

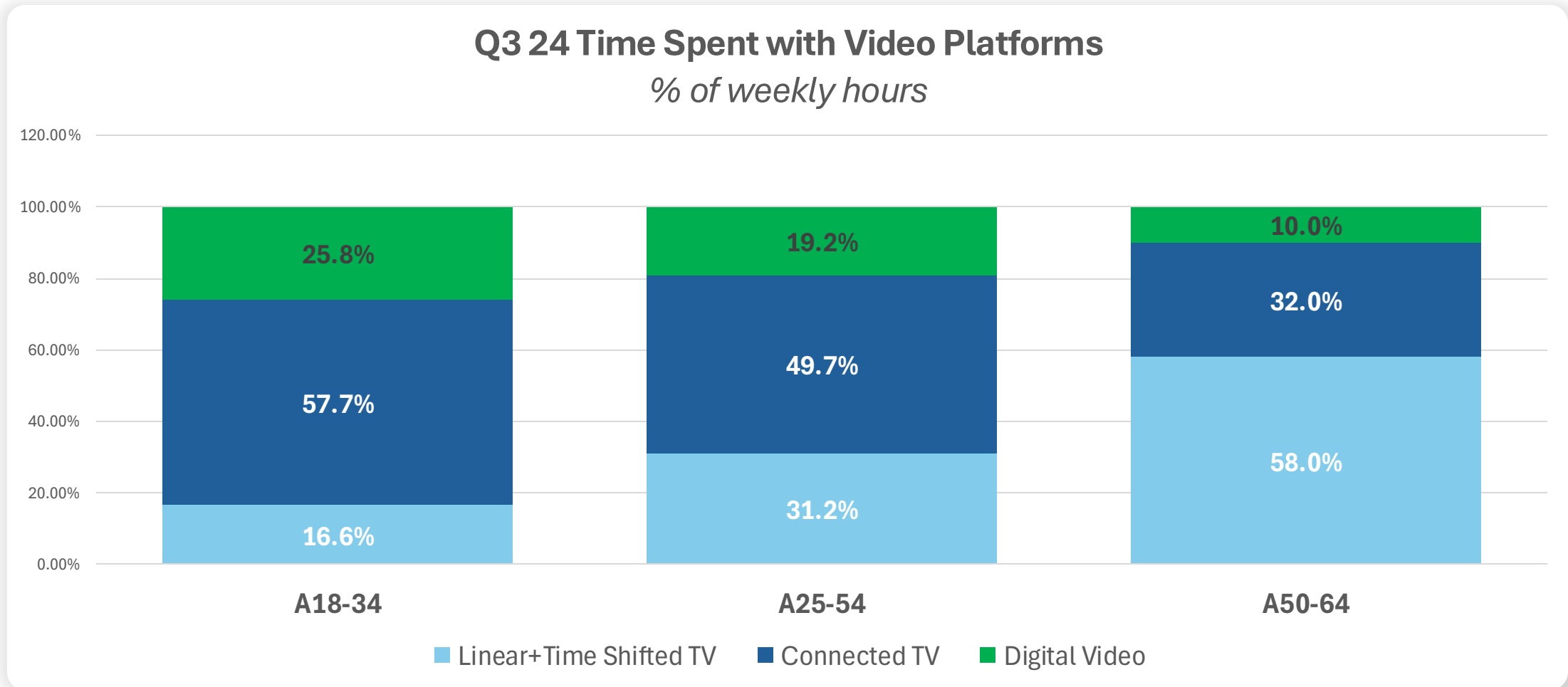


	2024	2023
Other Streaming	6.0%	5.0%
YouTube	10.6%	9.0%
Netflix	7.9%	7.8%
Prime Video	3.1%	3.6%
Hulu	2.4%	3.6%
Disney+	2.3%	1.9%
Peacock	2.1%	1.1%
Tubi	1.8%	1.3%
Roku Channel	1.7%	1.1%
Max	1.3%	1.2%
Paramount+	1.1%	1.1%
Pluto	0.7%	0.9%

Source: Nielsen National TV Panel Data plus Streaming Video Ratings, Total Day - Person 2+. Other TV Usage includes VOD, Gaming, DVD playback, AOT

September 2024 Television Streaming

Time spent with Video varies greatly by Age



Source: Nielsen NTAR Supplemental Data Tables Q3 2024; Weekly time spent

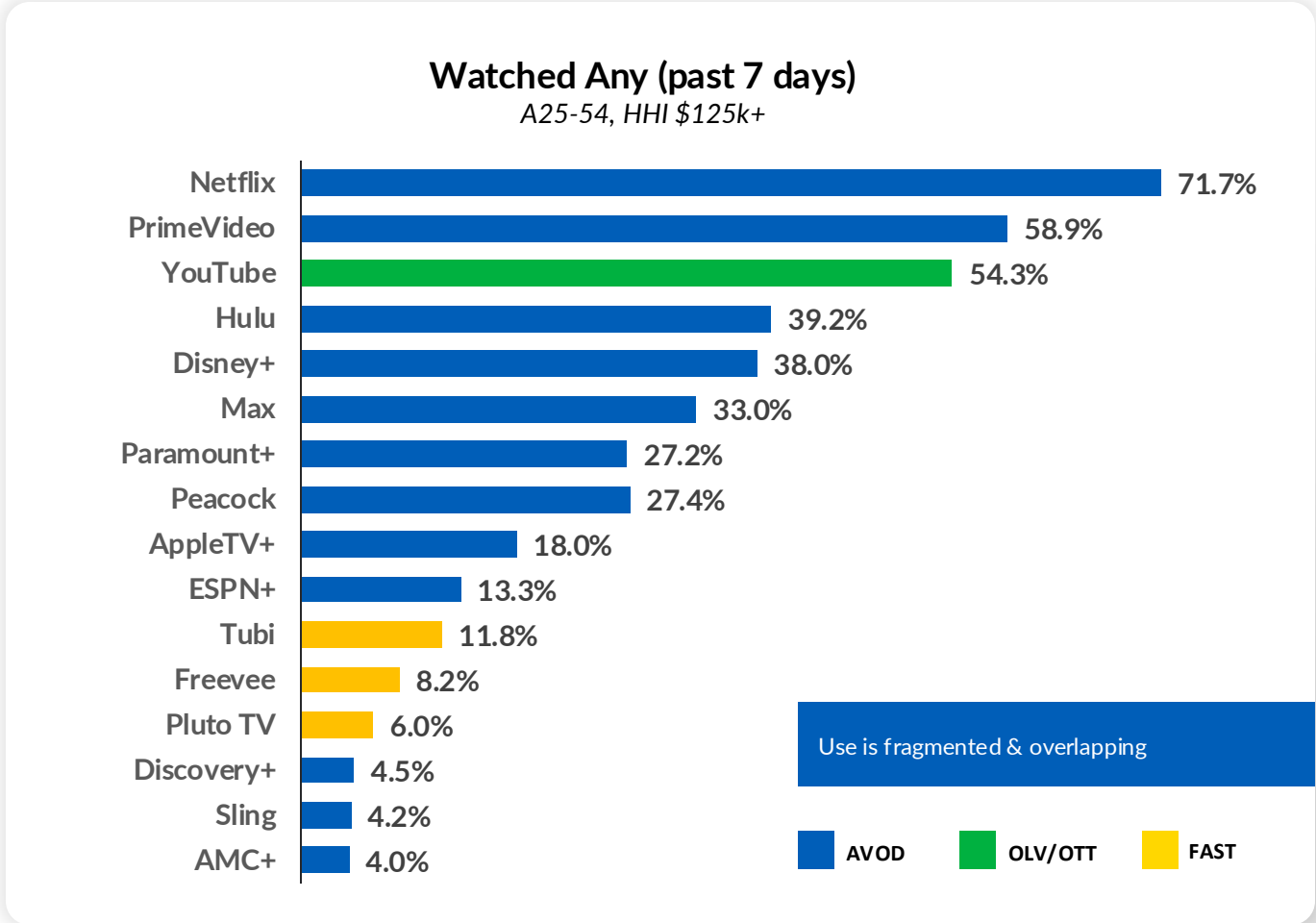
Weekly Usage

A25-54, HHI \$125k+



Any Video Streaming Service Used In Past 7 Days















Streaming usage by provider



Source: MRI-Simmons, Summer 2024 Survey, Southeast Marketing Region

Cross-Usage of Select Streaming Services in the US

% of total US households who subscribe to both:

							
	-	73%	55%	49%	37%	31%	22%
	80%	-	55%	51%	39%	33%	35%
	86%	78%	-	65%	46%	40%	39%
	85%	81%	72%	-	49%	41%	42%
	88%	84%	71%	68%	-	44%	46%
	83%	80%	67%	63%	49%	-	55%
	84%	86%	67%	65%	62%	56%	-

Source: Advertising Research Foundation (ARF) report "TV Deconstructed: Latest Findings from the DASH Study" June 2024

Service 'stacking' may have peaked in '23

	Q2 2022	Q2 2023	Q2 2024
Average Total Services	9.9	10.9	9.1
	↓	↓	↓
Average Paid Services	6.7	6.9	5.7
	↓	↓	↓
Average Non-Paid Services	3.2	4.0	3.4

Average SVODs per subscriber

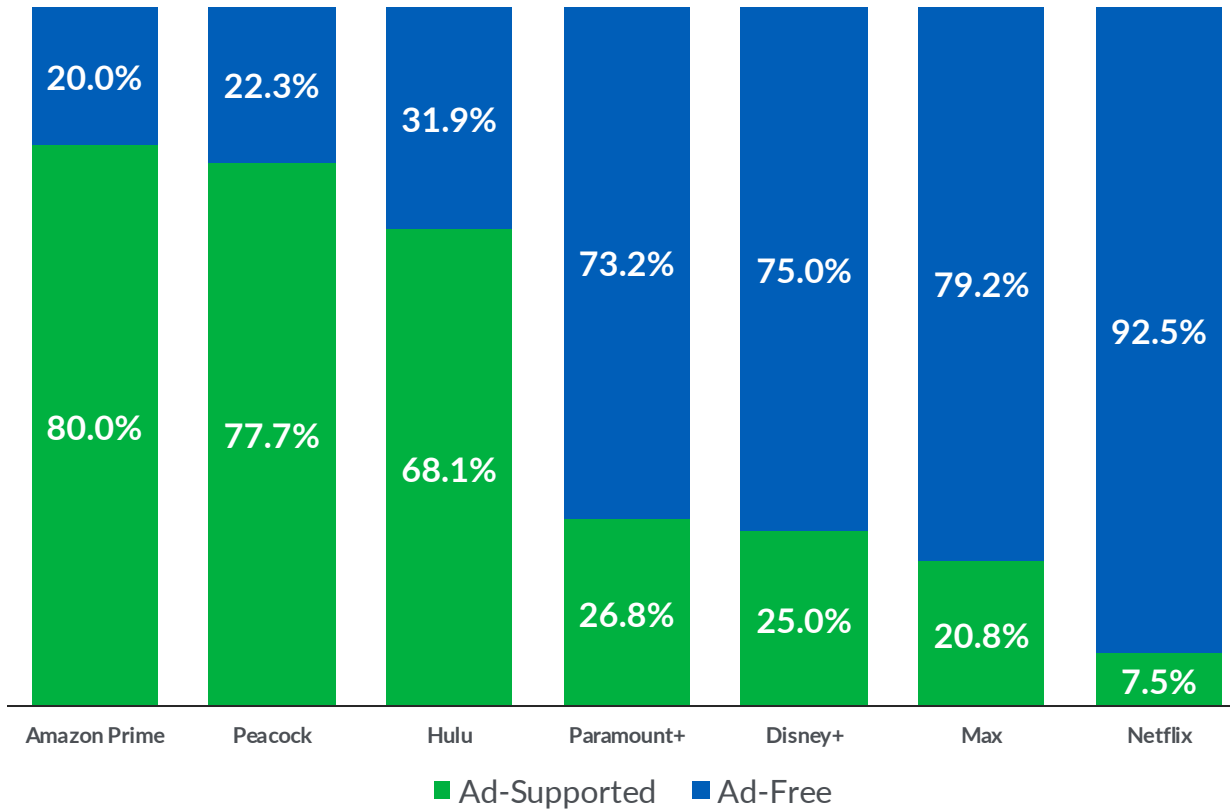
5.7

down for first time in 2024

Source: TiVo Q2 2024 Video Trends Report

Hybrid options are now the norm for nearly all streaming services

Share of Subscribers by Plan Tier as of Feb 2024

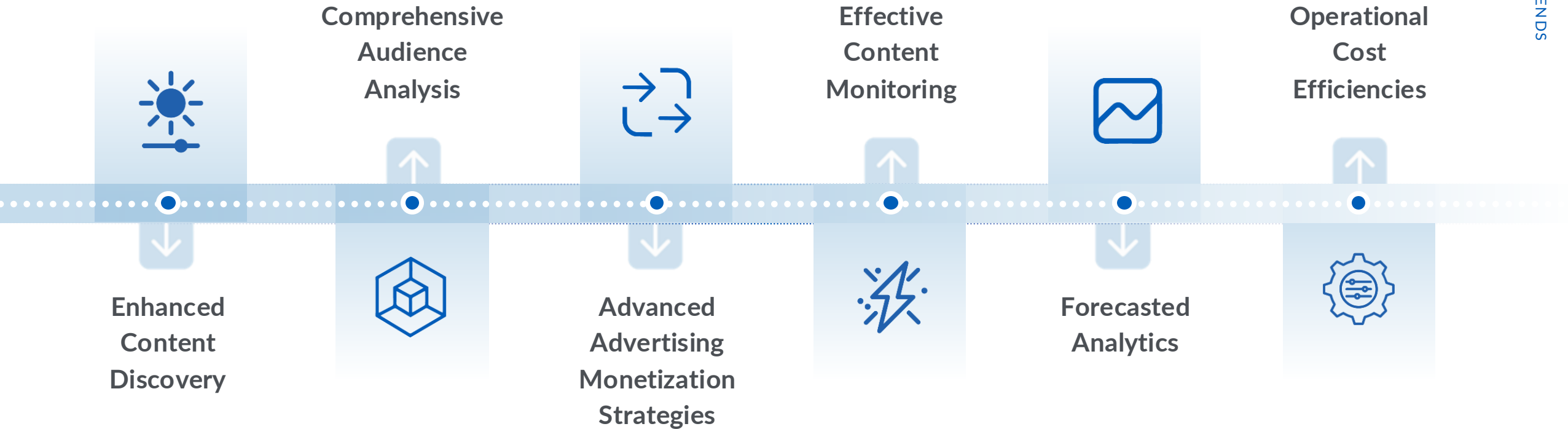


- Amazon Prime, Peacock and Hulu have the largest share of ad-supported subscribers
- 39% of Netflix’s May 2024 sign-ups were for ad-supported
- About HALF of new subs to Paramount+, Disney+ and Max in May ‘24 were ad-supported additions

Sources: eMarketer, February 2024; Antenna, 6/21/24

Key Advantages of AI in Video

AI is having a profound impact on the media industry by using **advanced algorithms** to enable **personalized content creation**, provide **audience behavior insights**, and enhance data-driven decision-making, leading to improved user **retention rates** and **platform engagement**.



Using AI for personalization and more

Digital native & legacy networks have been working to advance the use of machine learning and AI to develop, test, launch and iterate new product features and ad solutions at greater quality and speed, to create more personal experiences for audiences

Proprietary metadata tagging that leverages video intelligence to capture the content, brands, images and moods of scenes across Disney's library

New technology that allows analyzation of scenes and visuals across the expansive Disney library – which then serves ads with optimal creative

Brands can capture a specific moment, mood or emotion. Only Disney has the power to reach the right audience at just the right moment

Disney Magic Words



What that means for our users is that we will continue to drive more personal content recommendations, create richer discovery experiences, and deliver ads that are more resonant for our audiences.”

-Adam Smith, Disney Chief Product & Technology Officer

Heinz Store Linda's account amazon

Heinz Ketchup
★★★★★ 333
\$3.28 1 count

amazon Shoppable

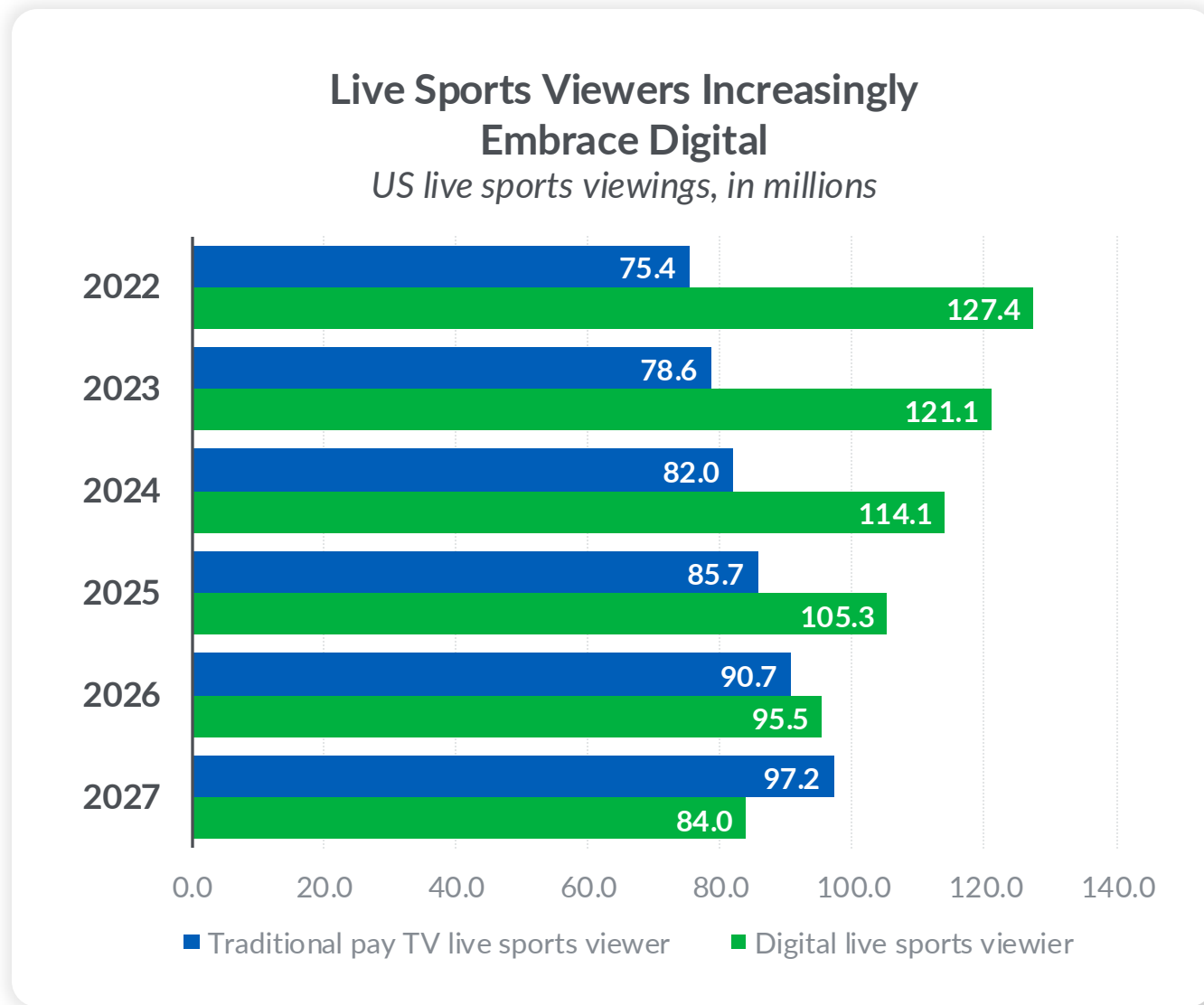
Sports viewership evolving

Share of the US population watching live sports is steady

- Live sports viewers saw a minimal uptick between 2018 to 2024, 46.9% to 47.6%
- The way people are accessing sports has evolved

Traditional live sports viewership is declining, while digital options are steadily increasing

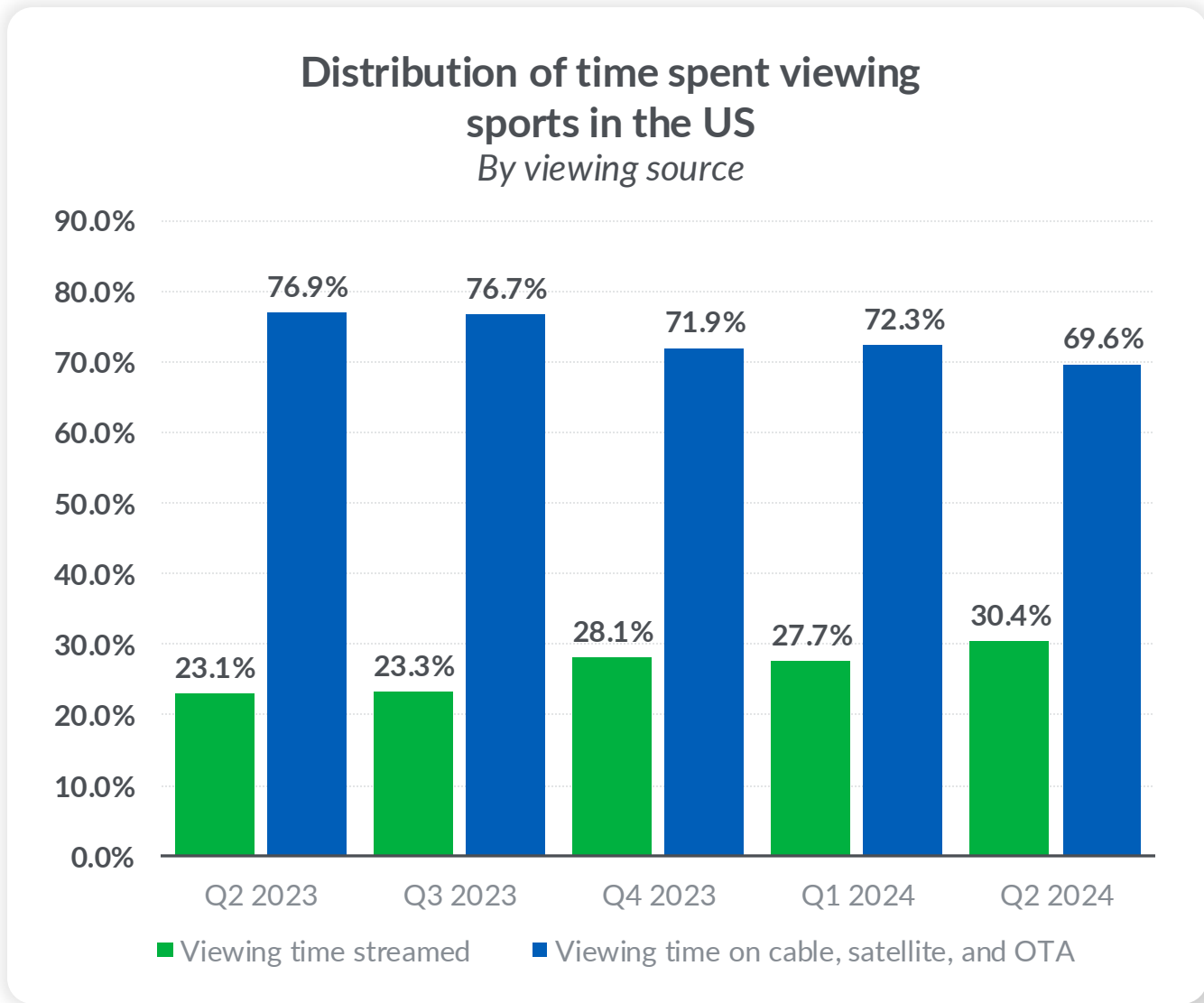
- Digital live sports viewers expected to climb to 127.4M by 2027



Source: Emarketer "US Sports Streaming 2024" Sept 2024

Time Spent Watching Sports

- Although digital sports viewership is up, linear TV cannot be counted out.
- Most sports still run on linear TV.
 - In 2024, 7% of NFL games were exclusive to streaming services, while 42% of NFL games were exclusive to linear TV networks.
- Heavy sports watchers are abundant in the cohort that's still paying for cable TV.
- Time spent viewing live sports is 70/30 linear vs streaming



Sources: Emarketer "US Sports Streaming 2024" Sept 2024; Inscope Statista 2024







Sports Streaming...more options

Digital sports viewership is up, because sporting events can now be streamed on a variety of platforms

- **NETFLIX** aired **NFL** games for the first time on Christmas and will begin airing sports-adjacent **WWE** programming in 2025.
- **prime video** will soon add **NBA** and **WNBA** games to its sports portfolio, which already includes select **NFL**, **MLB**, and **NHL** games.
- **peacock** will add **NBA** games to a sports roster that includes **NFL**, **NCAA** football and basketball, **soccer**, **NASCAR**, and **Olympics** coverage.
- **Roku** Channel features Sunday morning **MLB** games.
- **YouTubeTV** is home to **NFL** Sunday Ticket.
- **ESPN+** and **DAZN** offer sports programming with smaller audiences, such as **boxing** and second-tier **college football** games.
 - ESPN is launching 'Flagship' a DTC streaming service in fall 2025.
- **HULU + LIVE TV** and **YouTube TV** allows for sports broadcasts on linear TV networks to be streamed through these digital pay TV services.
 - **Paramount+**, **Peacock**, and **Max** also simulcast CBS, NBC, and TNT/TBS/truTV live events, respectively.

Source: Emarketer "US Sports Streaming 2024" Sept 2024

Sports ...Where to watch

					
STREAMING					
<p>NFL PARAMOUNT+ NFL ESPN+ PEACOCK AMAZON YOUTUBE-SUNDAY TICKET NETFLIX</p>	<p>NBA PEACOCK AMAZON</p>	<p>MLB APPLE TV+ ROKU CHANNEL</p>	<p>NHL ESPN+</p>	<p>MLS (SOCCER) ESPN PEACOCK UNIVISION AMAZON APPLE TV</p>	<p>NCAA FOOTBALL BASKETBALL PEACOCK ESPN+</p>
LINEAR					
<p>FOX ESPN ESPN 2 CBS NFL NETWORK NBC TELEMUNDO</p>	<p>ABC ESPN NBA TV TNT NBC SCRIPPS (WNBA)</p>	<p>TBS FOX ESPN MLB NETWORK</p>	<p>TNT ESPN</p>	<p>TELEMUNDO UNIVISION SCRIPPS TNT FOX CBS</p>	<p>ABC ESPN FOX NBC CBS CW CONFERENCE NETWORKS (VARIOUS)</p>



Women's Sports gaining traction

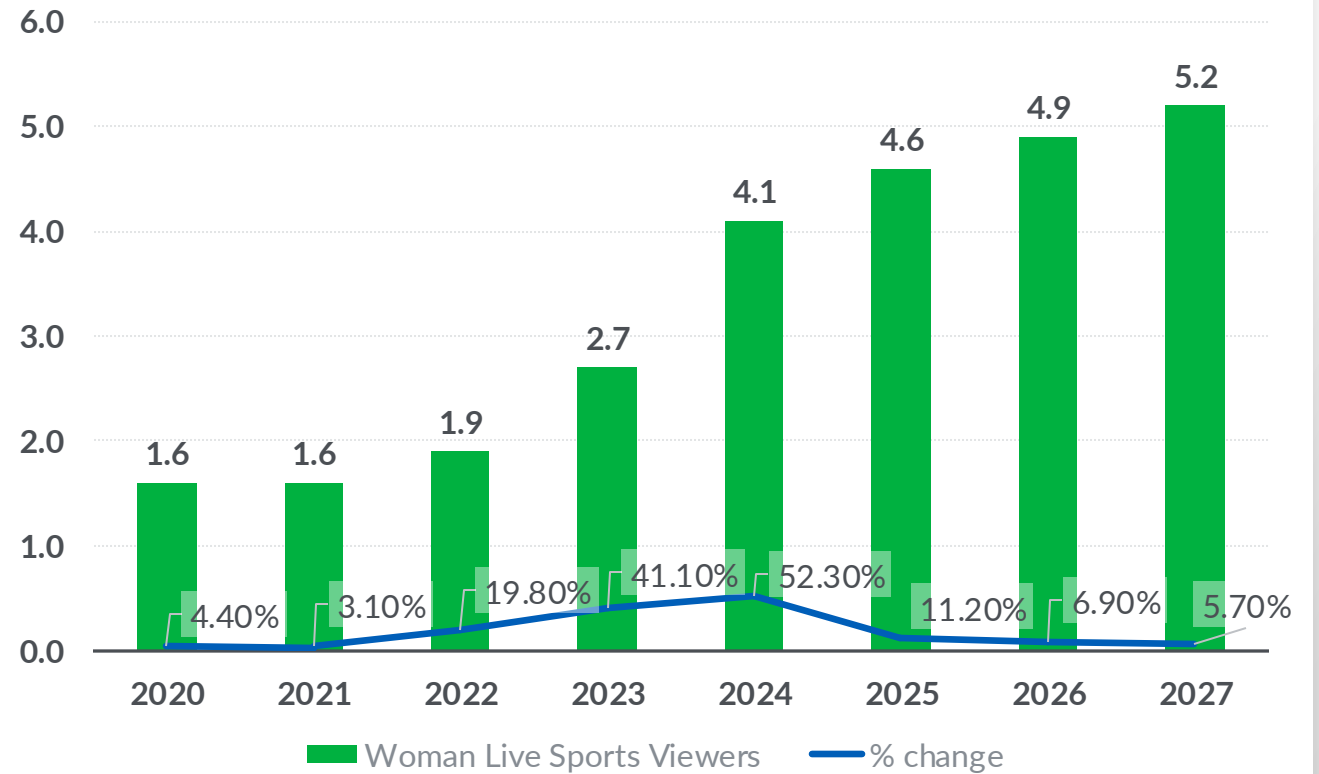
Women's sports have also taken shape on a broader scale, due to increase of TV rights deals.

Viewership of women's live sports has experienced significant growth, more than doubling from 2022 to 2024.

There is still considerable potential for further expansion, as only 2.5% of all live sports viewers consistently watched women's sports in 2024.

Viewership of Woman's Live Sports is Increasing Quickly but Still Has Much Room to Expand

millions of US live sports viewers % change, % of live sports viewers



Source: EMarketer, "US Sports Streaming 2024" Sept 2024

Key Takeaways



Fragmentation

Fragmentation isn't a roadblock; it's an opportunity for the media ecosystem to evolve by embracing data-driven strategies, diverse storytelling, and cross-platform innovation. The result? Stronger consumer connections and more efficient monetization strategies.



AI

AI algorithms analyze user data to predict preferences, allowing for tailored recommendations and content creation, leading to higher engagement and user satisfaction.



Sports

Live sports continues to be an anchor for linear television, but with more sports moving to streaming, the advantages that traditional TV once held are further eroding.

The Future of Data

THE FUTURE OF DATA



Privacy Regulation



Challenges due to the complexity and fragmentation



Tech Antitrust Trials



Impact of five Big Tech DOJ & FTC lawsuits

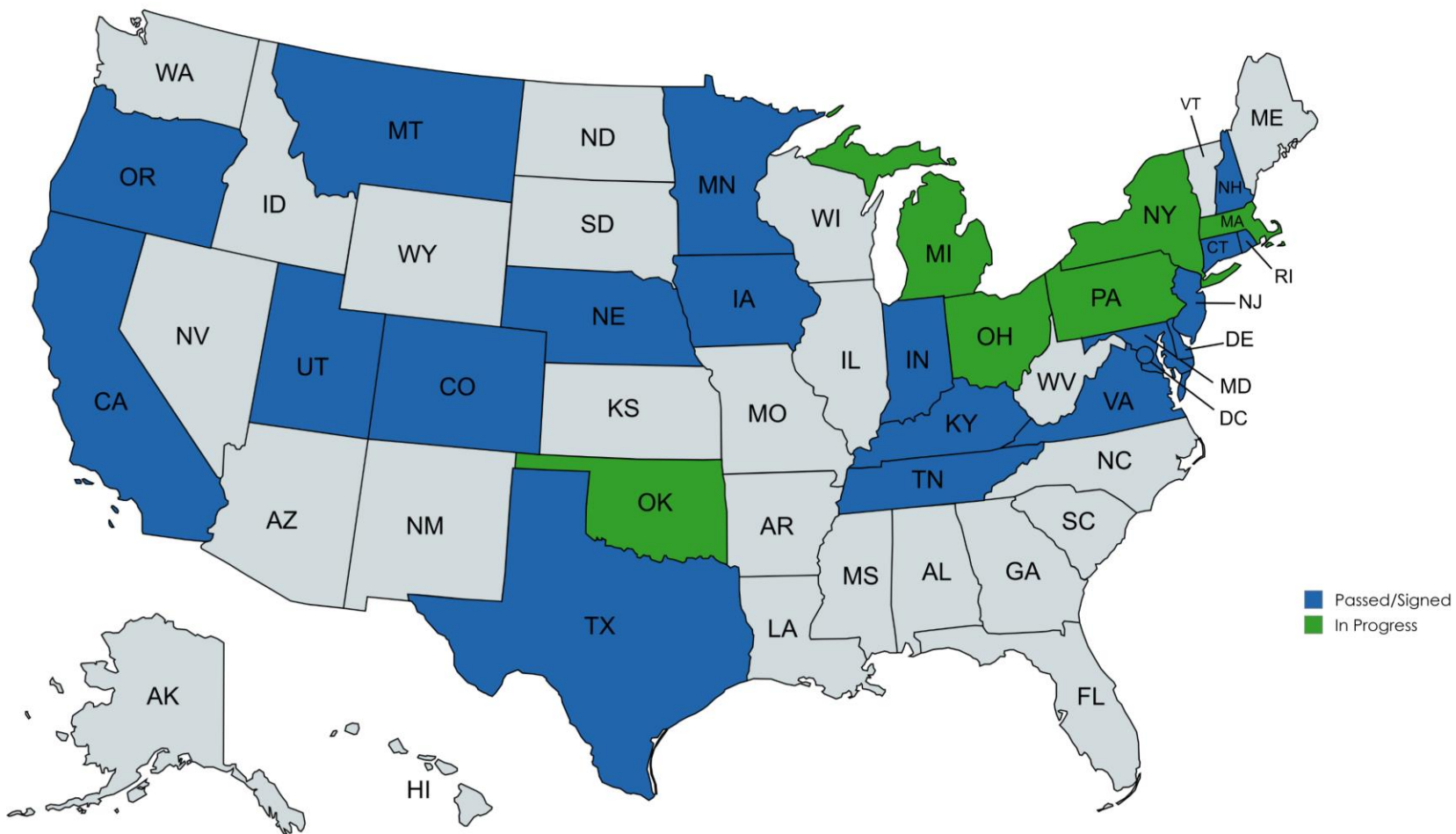


Advertising Data Paradox



AI & privacy dualities impact on marketing strategies

Regulatory Environment



Common Themes:

Transparency:

Data collection, processing, and sharing practices

Consumer rights:

Access, correct, delete, or opt out of data processing

Data protection measures:

Stricter data security measures and assessments

Protecting Children:

Data privacy and social media restrictions

State privacy laws present significant challenges



Compliance Across Jurisdictions

Operational and Financial Burden

Data Management Complexity

Consumer Trust & Brand Reputation

Technology and Vendor Challenges

Impact on Advertising Strategies



While Waiting for a Federal Law

Balance compliance with state laws while anticipating potential future federal regulations

- Invest in Privacy Tech
- Adopt "Highest Common Standard"
- Stay Informed & Educate Teams






Tech Antitrust Trials



The outcomes of the **5 DOJ and FTC antitrust cases** could have major impacts on the advertising industry



Big Tech Antitrust cases could impact advertising landscape

Illegal Monopoly in:	SEARCH	AD TECH	SOCIAL	SMART PHONES	ONLINE RETAIL
Company					
Trial Timing	August 2024 Verdict Ruled in Violation- In appeals	Concluded November 2024 Verdict to be announced 2025	April 2025	February 2026	October 2026
Potential Outcome	Divest from its Chrome browser	Separation of ad buying and selling businesses	Break up Facebook, Instagram, and WhatsApp	More open ecosystem	Break up company

Advertising Data Paradox



Privacy



Privacy regulations prioritize data minimization, anonymization, and user consent, reducing the scope of available information

Concerns: Targeting, measurement, legal

Benefits: Consumers preferences



Artificial Intelligence



AI thrives on vast amounts of data to enable hyper-personalized, predictive analytics, and seamless consumer experiences, driving unprecedented efficiency and effectiveness

Concerns: Less control, brand safety, legal

Benefits: Efficiency, Personalization

Marketers must navigate this duality by investing in privacy-compliant tech that respect user rights while harness AI's potential without compromising compliance

SIGNAL LOSS DATA STRATEGIES



First Party Data



- Collection
- Consent
- Clean Rooms



AI Products



- Testing
- Balanced
- Human Oversight



Conversion APIs



- Enhanced conversion & APIs
- Probabilistic Models



Media Quality



- Brand Safety
- MFAs
- Data Value

Key Takeaways

Privacy Regulations



- **Invest in Privacy Tech:** like consent management platforms (CMPs) and data mapping
- **Adopt a "Highest Common Standard":** Implement privacy practices that meet strictest state laws to simplify compliance
- **Stay Informed:** Monitor legislative changes and adjust strategies proactively

Tech Antitrust Trials



- **No immediate action,** but Brands should stay prepare for potential platform changes in response to these lawsuits.
- Consider **diversifying ad spend** and strengthening first party data strategies

Advertising Data Paradox



- **First party data** – prioritize consented collection and utilization
- **AI Products** – test into AI solutions, while balancing with more granular approaches
- **Conversion Enhancing Strategies** – Reduce signal loss with conversion APIs
- **Media Quality** – Emphasize brand safe, high value inventory

Final Thoughts

2025

Stay agile, embrace innovation, and prepare for what's next



Q&A

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HARMELINMEDIA 

About us



Harmelin Media specializes in strategic media solutions and has more than 40 years of experience helping clients navigate a rapidly changing media landscape across digital, traditional and lifestyle forms. The firm has grown with a diverse client roster including many Fortune 500 companies across an array of industries and is now one of the largest independent media service firms in the United States.

Harmelin's expertise is in managing the massive data sets that our clients and campaigns generate to develop strategic, channel-agnostic recommendations that generate business results and positive return on investment. We accomplish this while maintaining a long-term business focus, providing superior customer service and operating with 100% transparency in our operations. Our approach has resulted in unprecedented retention rates with both employees and clients.

Harmelin's current media billings exceed \$800 million across all digital and traditional channels on a local, national and international basis. We are a Google Premier Partner, Meta Business Partner and proud member of the ANA.

For more information, please contact info@harmelin.com or visit www.harmelin.com.

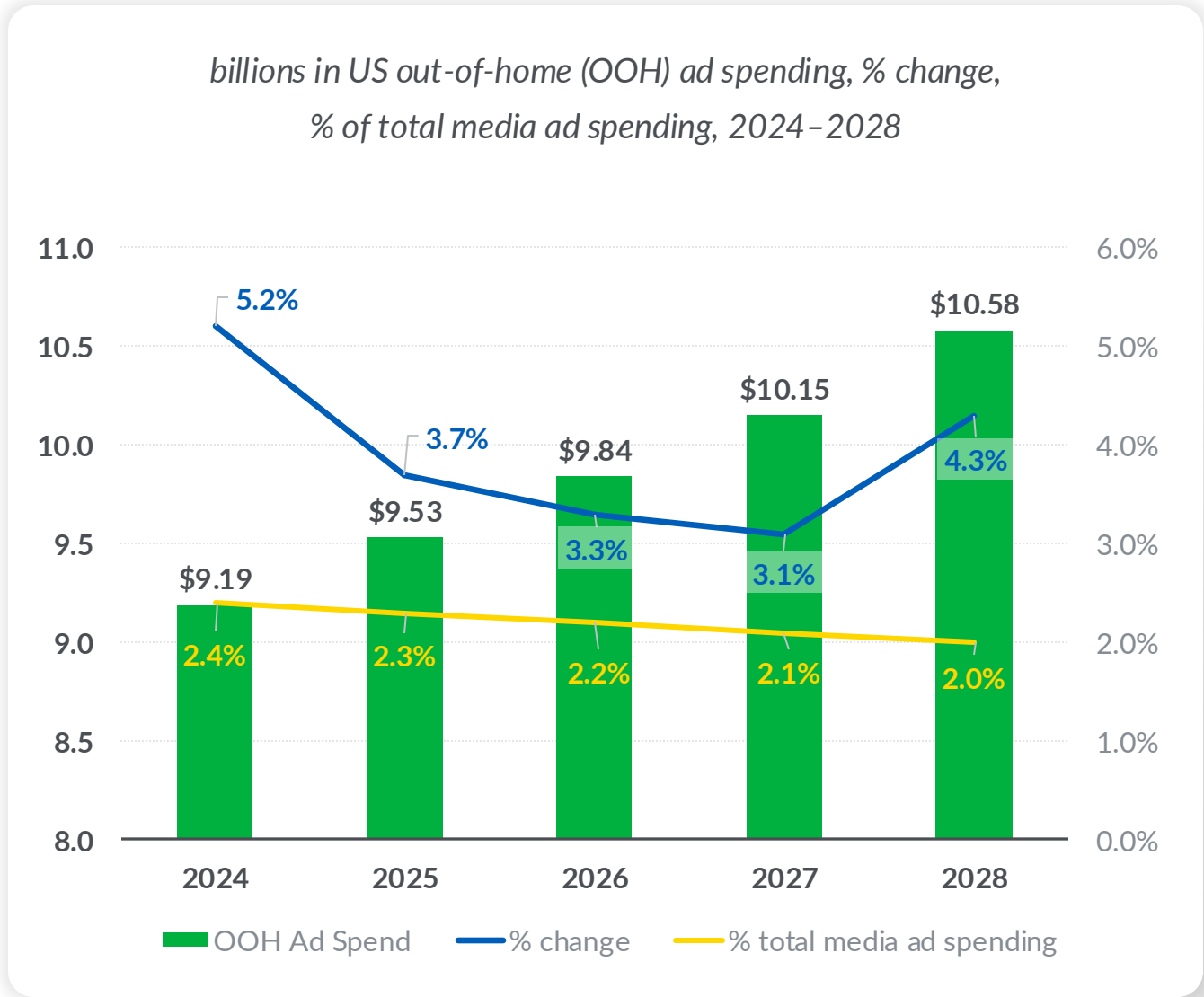
Appendix

Audio and Out-of-Home Updates

A1 OUT-OF-HOME

A2 AUDIO

Out-of-Home Growth Outpacing Traditional



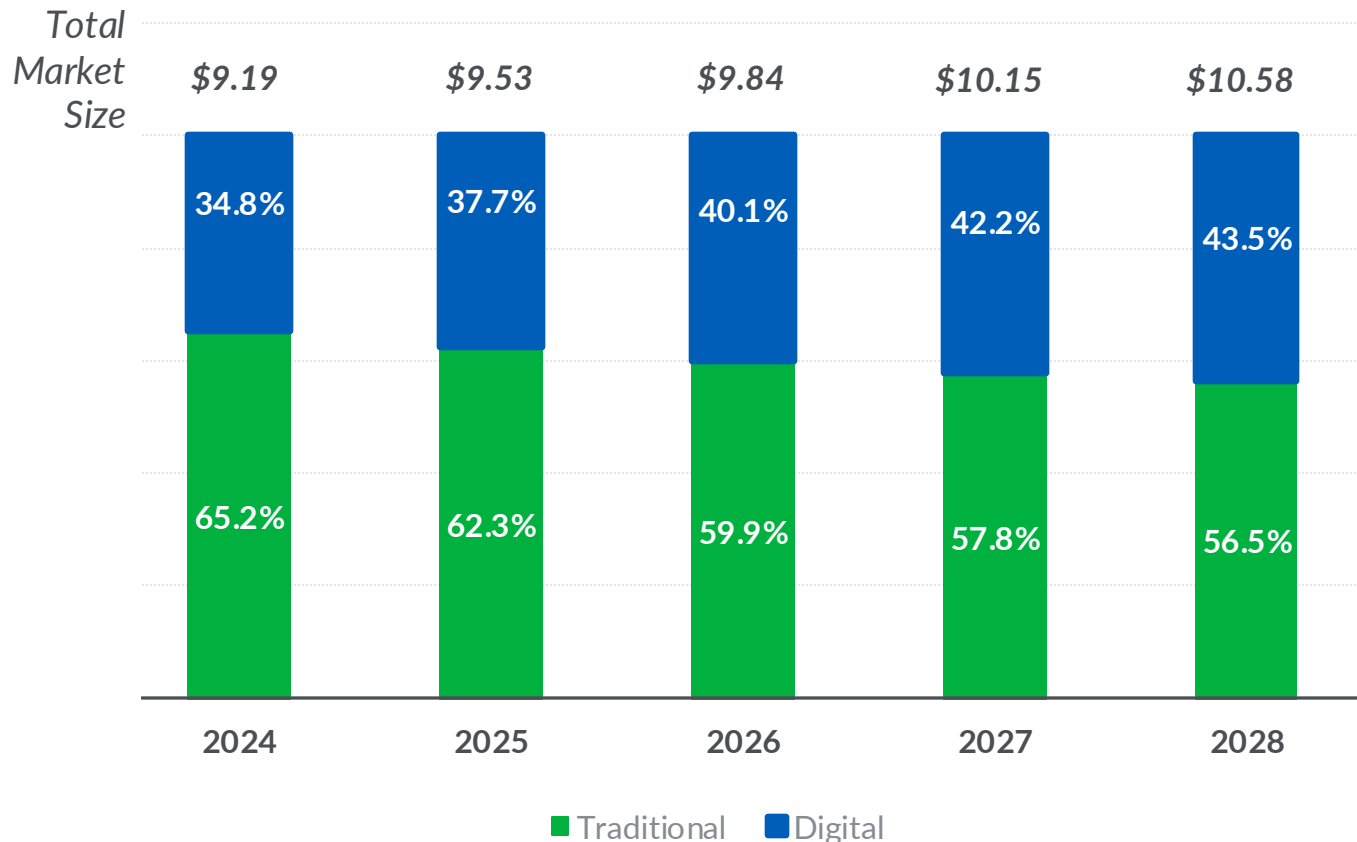
Key Takeaways

- OOH YoY ad spend growth (5.2% in 2024) exceeds overall traditional growth (0.1% in 2024).
- Billboards are the leading OOH format, according to the *Out of Home Advertising Association of America* (72.5% of OOH ad revenues in 2023).

Agencies beginning to bundle OOH buying with other media, unlocking opportunities for integrations with display, social and TV.

Digital OOH Closing the Ad Spend Gap

% of US out-of-home (OOH) ad spending, by media, and billions in total spending, 2024-2028



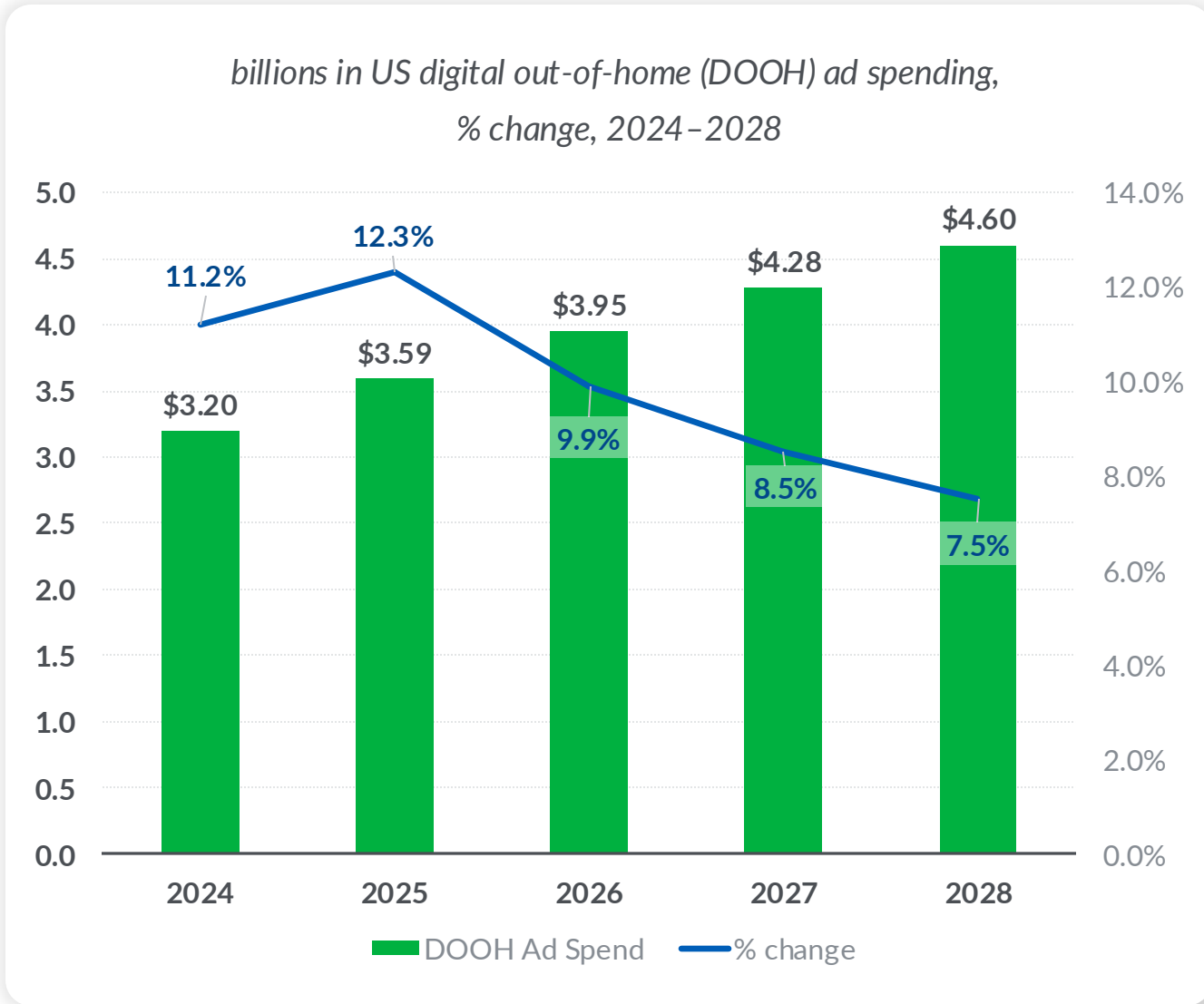
Source: EMARKETER "Forecasts and Insights for Out-of-Home", March 2024

Key Takeaways

- With a 9.5% projected CAGR, Digital OOH will drive out-of-home growth over the next few years.
- DOOH accounted for nearly 35% of total OOH ad spend in 2024, despite representing only ~15% of OOH ad inventory.

Though share declines are expected to continue, projections indicate traditional will still earn the majority of OOH ad dollars in 2028.

Programmatic Driving DOOH Growth



Key Takeaways

- Programmatic DOOH generated more than a quarter of Digital OOH ad spend in 2024.
- Per Place Exchange, video remains a small share, making up ~21% of DOOH ad mix headed into 2024.

Richer location-traffic data merged with other sources has enhanced precision in DOOH ad targeting, including more sophisticated dayparting.

OOH Measurement is Evolving

Legacy measurement systems are being phased out...

REACH & FREQUENCY:
Survey data and modeling

DEMOGRAPHICS:
US Census
Nationwide Journey to Work Survey

VISIBILITY RESEARCH:
Eye tracking studies

CIRCULATION COUNTS:
DOT Traffic counts
Pedestrian model



... And being replaced with standard ratings system for all audited media

REACH & FREQUENCY:
Mobile device data

DEMOGRAPHICS:
Claritas, GFK MRI, US Census, US Gov data, etc.

VISIBILITY RESEARCH:
Eye tracking studies; Speed Data

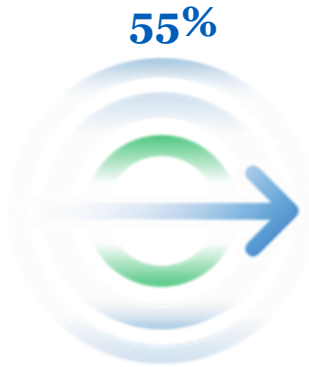
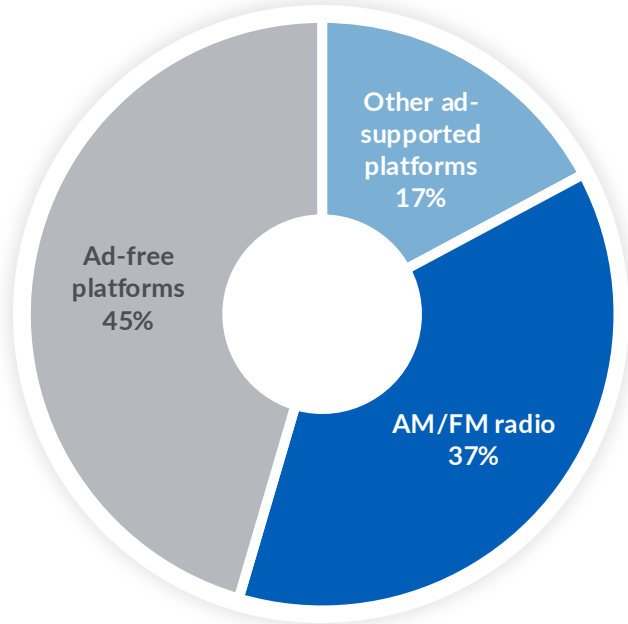
CIRCULATION COUNTS:
Mobile trip data
DOT Traffic counts

A1 OUT-OF-HOME
A2 AUDIO

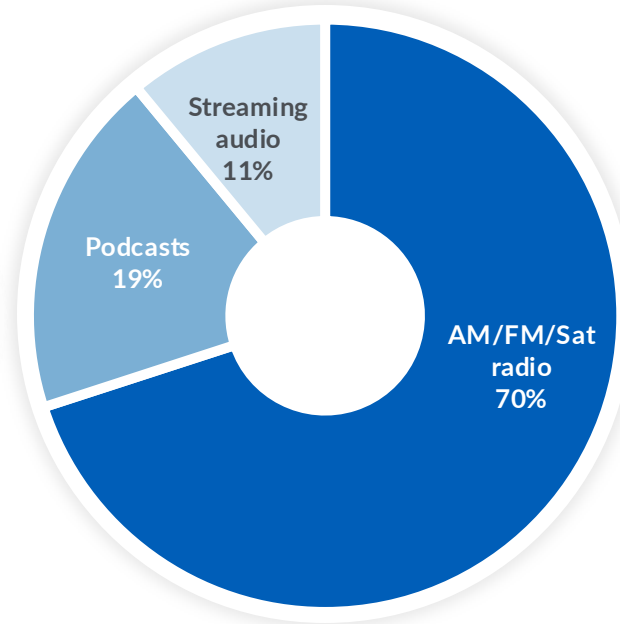
55% of Audio Time is Ad-Supported

AM/FM Radio Still Owns Largest Share

A18+ Share of total audio time spent



A18+ Share of ad-supported audio time spent



Majority of listening is now ad-supported

Top ad-supported streaming audio:

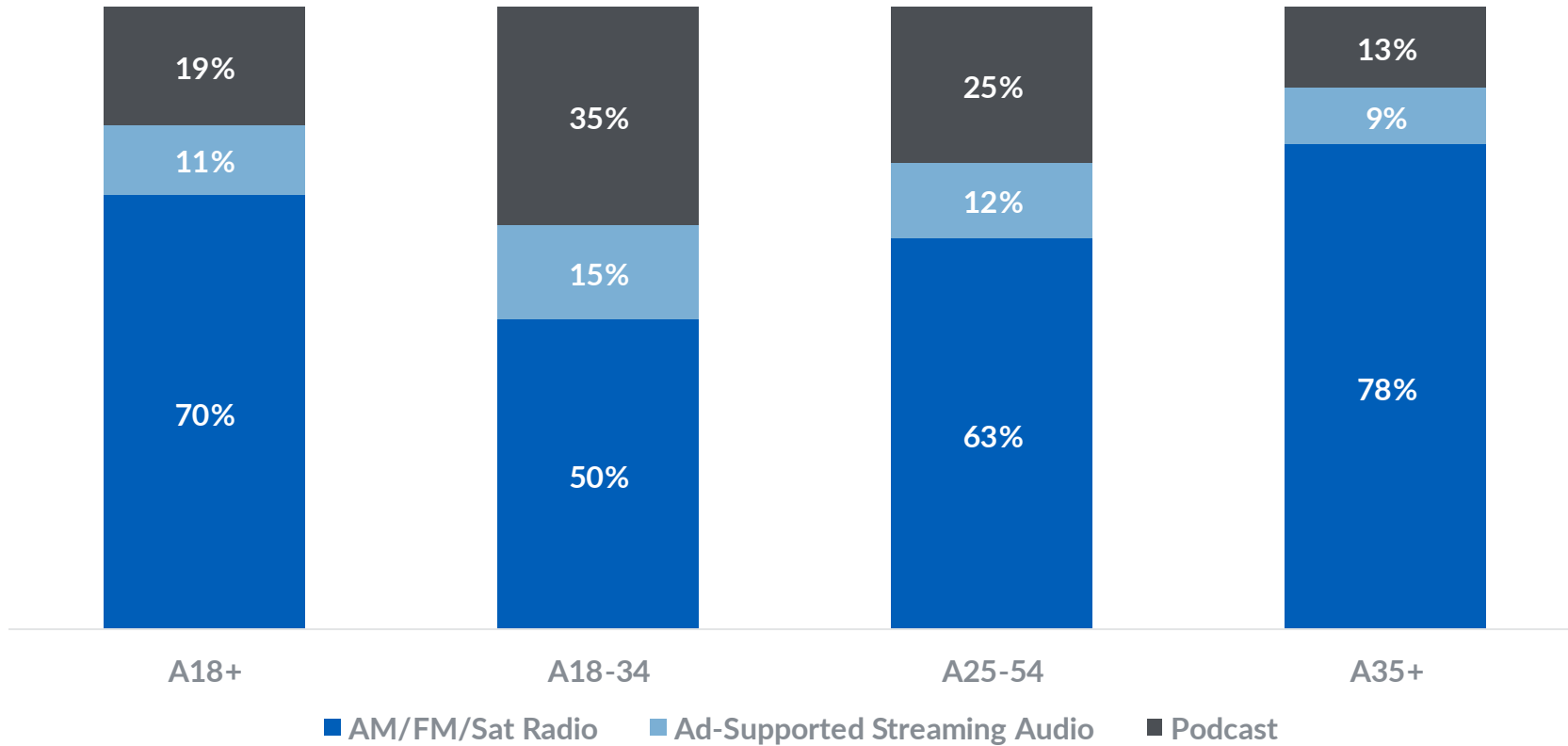
4%
Pandora

3%
Spotify

Source: Edison Research, Share of Ear Q2 2024, P18+
Podcasts listened to on streaming platforms are included in 'podcasts'

While Radio Still Leads, Podcasts Capture Younger Ears

Share of daily time spent with ad-supported audio among U.S. audiences



Source: Edison Research, Share of Ear Q2 2024
Podcasts listened to on streaming platforms are included in 'podcasts'

Roughly HALF of Gen Z & Millennials who listen to audio entertainment use 3+ audio services*

Radio Breakout (A18+):

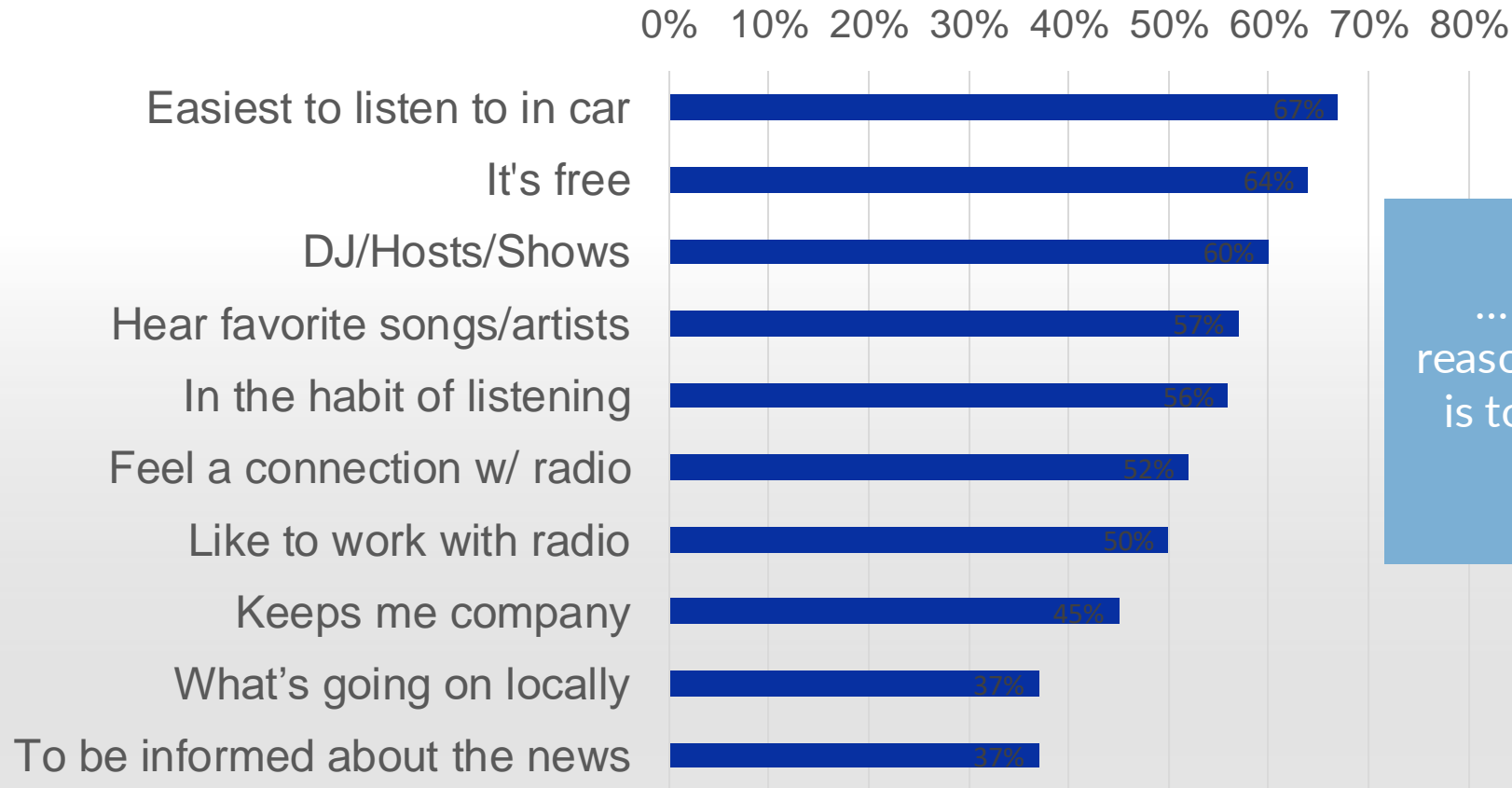
67%
AM/FM

3%
Satellite Radio

*Includes Radio

Local Connections & Personalities Central to Radio Appeal

Why AM/FM radio?



... and nearly 40% say a main reason they listen to AM/FM radio is to hear about what's going on locally