

2026 Harmelin Media Channel Trends

Today's Hosts



Dan Cox

SVP, Strategic Planning



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Resources Group*

Today's Themes



Emerging Platforms and Formats



Expanding offerings,
expanded opportunities
(and challenges)



Platform Overlap Blurs Boundaries



Crossover confounds
channel buckets and
reshapes strategies



AI-Powered Transformation



Rapidly evolving
content, campaigns, and
consumer experiences

Meet Your Presenters



Video

Lisa
Rothmiller

Senior Director



Audio

Joyclyn
Faust

Vice President



Social

Taylor
Williams

Manager



Social

Brandon
Pokedoff

Manager

Meet Your Presenters



Influencer
Margot
Somers
Manager



Search
Richard
Bosler
Director



Retail
Elias
Schulkin
Associate Director



Out of Home
Kendra
Delmar
Manager



Programmatic
Marissa
Bisacquino
Manager

Video

Video

Streaming entering its 'Primetime'



Streaming providers continue to blur the lines of TV, delivering programming once deemed exclusive to linear

Fragmentation extends to Social, too



























Lines between Social Media and streaming also continue to blur, as video content – and viewing behaviors – evolves

AI continues to enrich viewer experience



AI equipping advertisers with more ways to reach and connect with users in meaningful, relevant ways

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

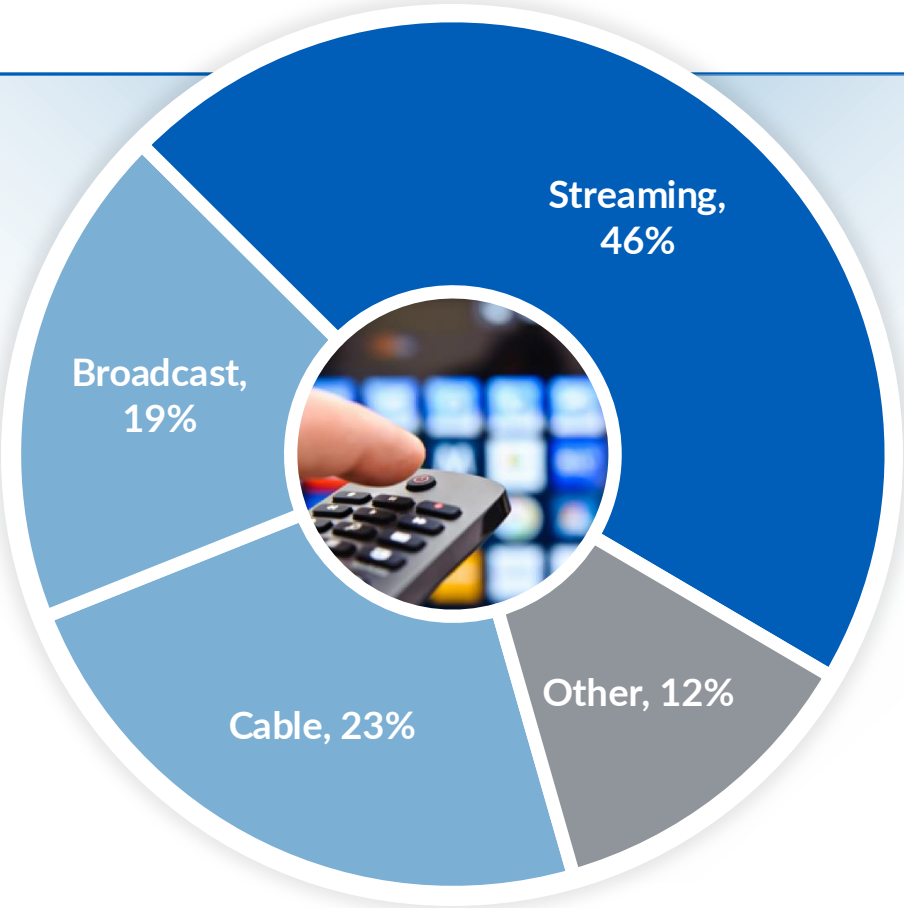
Video on the ‘Big Screen’ – streaming ‘comes of age’



Traditional linear accounts for just 42% of TV-based video viewing, with Cable slightly above Broadcast

Streaming viewing is outpacing both; rising from 41% to 46% of TV-based video usage Y-o-Y

YouTube seeing the largest gains in share of time spent vs. ‘24; with Roku also experiencing solid growth



	2025	2024
YouTube	12.8%	9.9%
Netflix	8.3%	8.4%
Other Streaming	6.7%	6.0%
Prime Video	3.6%	3.1%
Disney*	2.3%	2.0%*
Peacock	1.5%	1.2%
Tubi	2.2%	2.0%
Roku Channel	2.5%	1.5%
Paramount**	2.0%	1.2%
WB Discovery▽	1.4%	0.9%
Pluto	na	0.8%

* Disney includes viewing from Disney+, ESPN+ and Hulu SVOD
** Paramount includes viewing from Paramount+ and Pluto
▽ WB/Discovery includes viewing from Discovery+ and Max
* 2024 viewing reflects Disney+ only

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

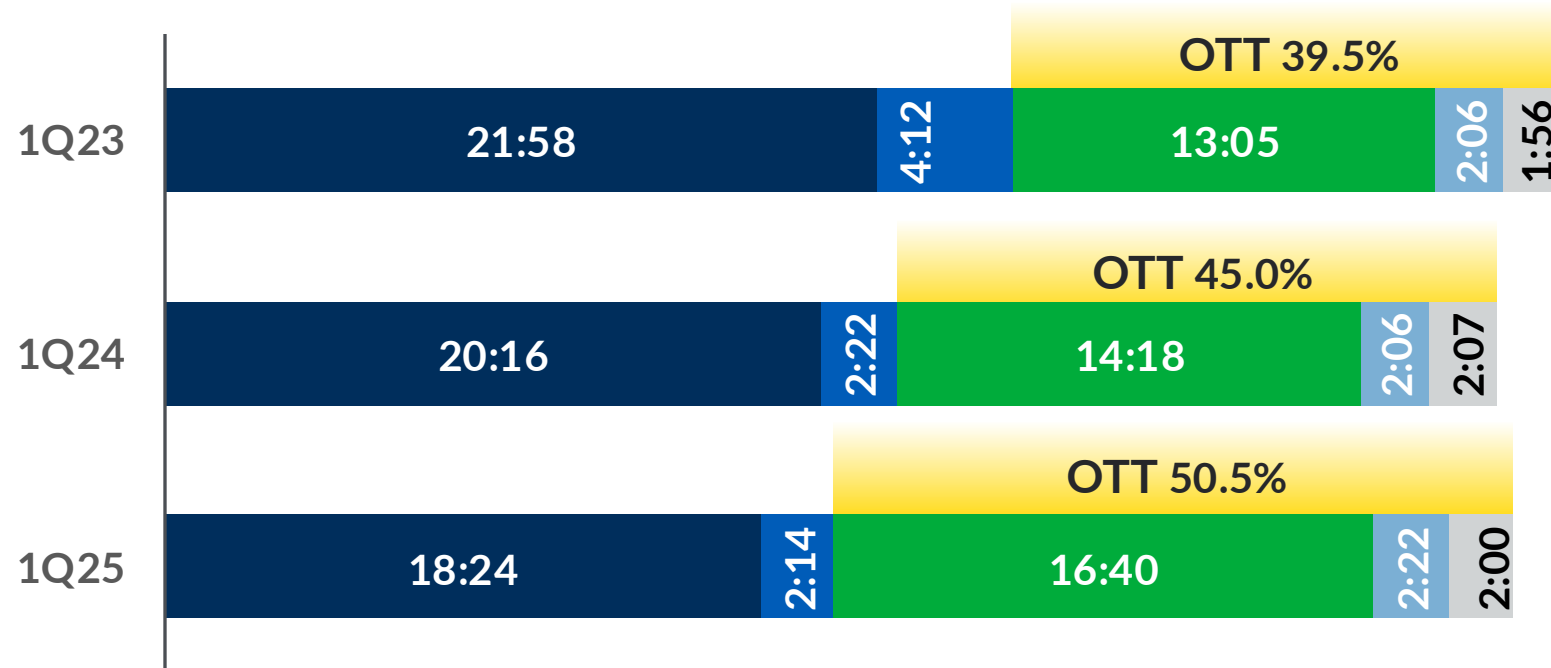
June 2025

Television Streaming

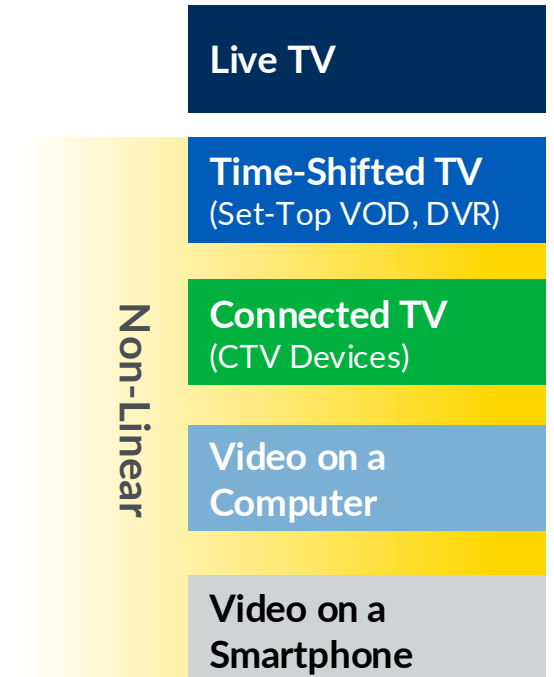
TV viewing continues shift toward OTT platforms & content

... Over half (51%) of all viewing on TV sets is to non-traditional, streaming content

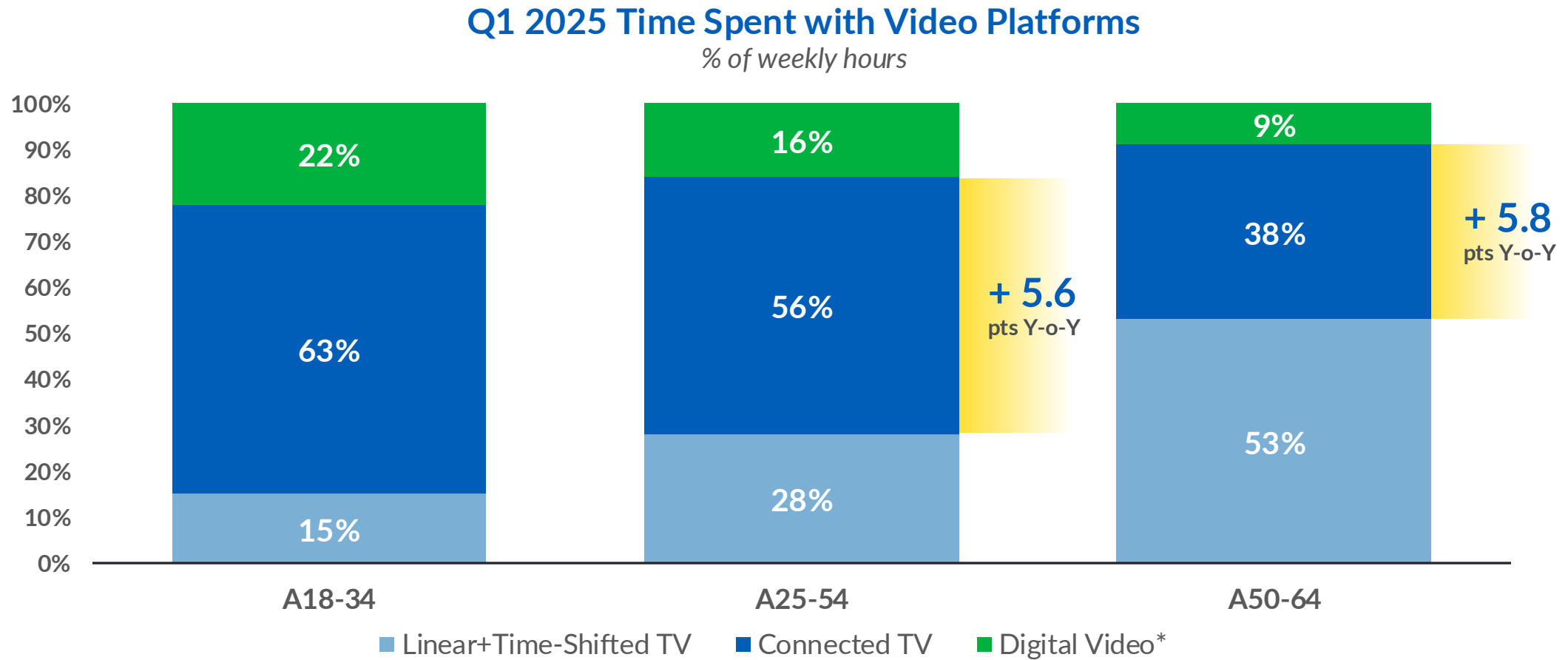
A18+ Time Spent with Video Platforms (weekly hours)



Note: Video on a Computer includes some content not universally defined as OTT programming



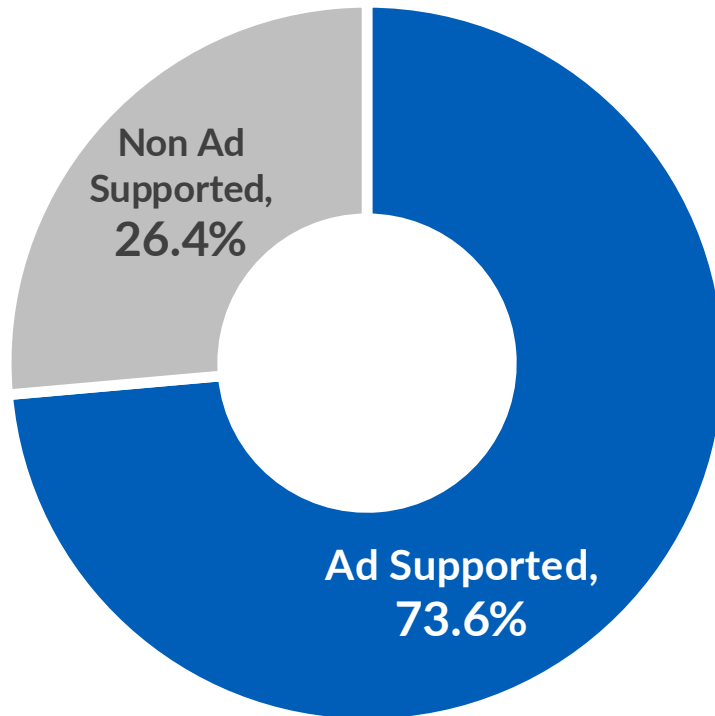
Time spent by platform varies by age, but CTV has most growth



Source: Nielsen NTAR Supplemental Data Tables Q1 2025; Weekly time spent

Ad-supported viewing remains dominant in Q2 2025

Total Day / Persons 2+

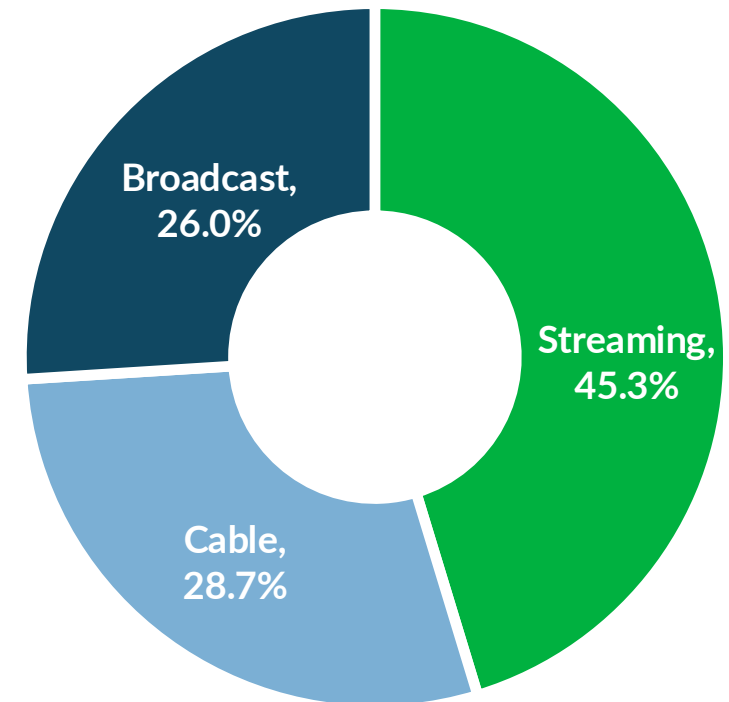


Ad Supported Share of TV

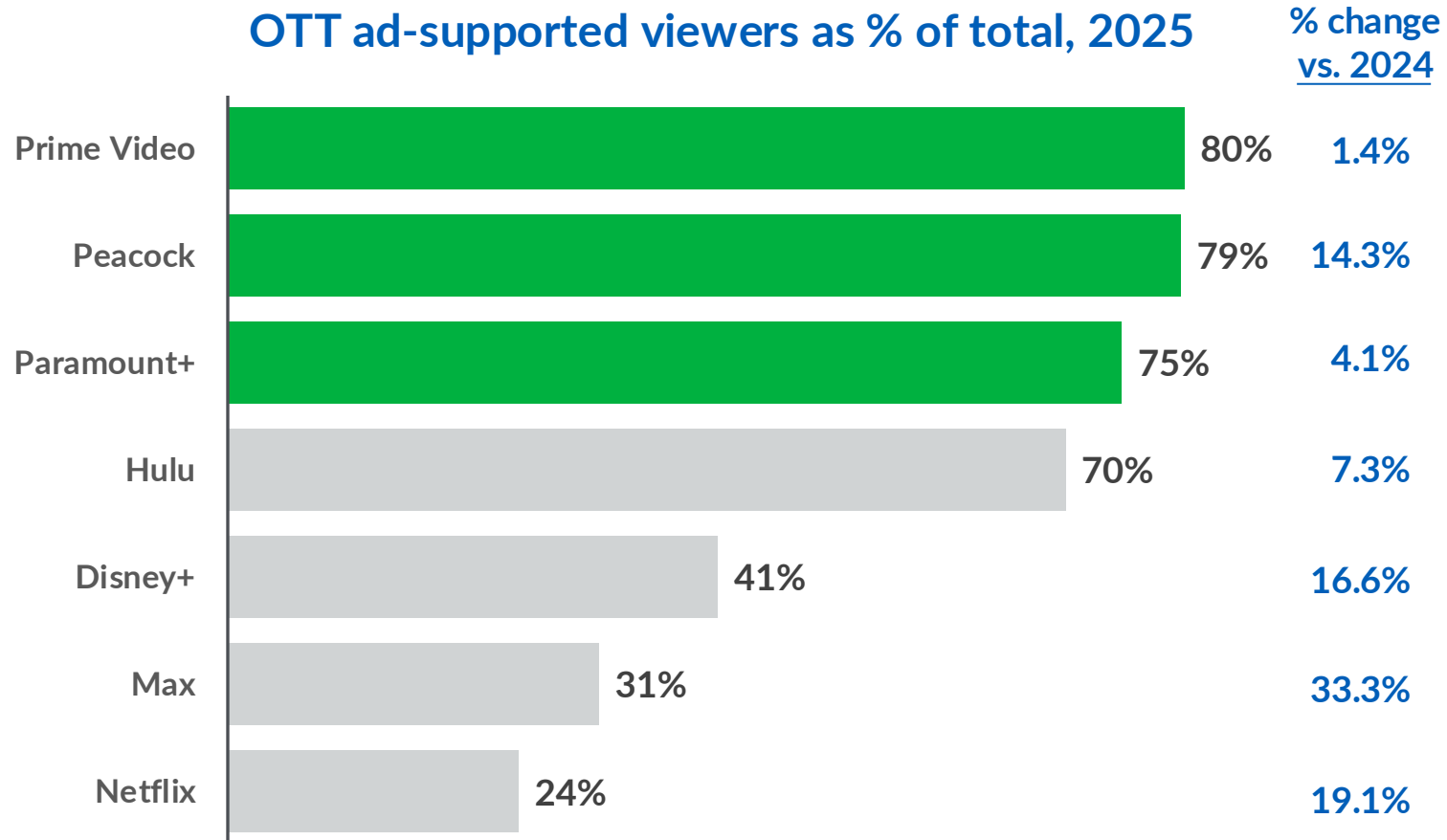


Category Share of Ad Supported TV

Total Day / Persons 2+



Ad-supported OTT subs are prevalent across providers

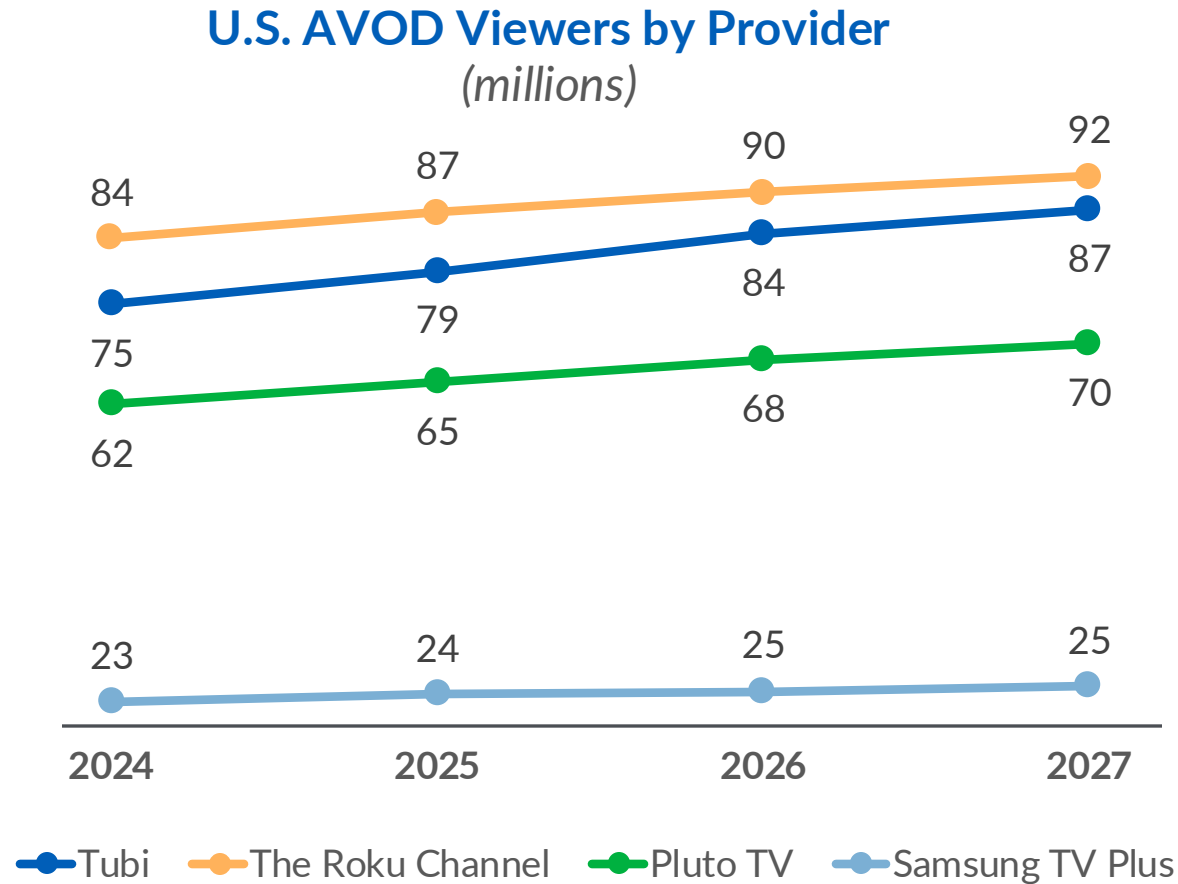


Ad-supported viewers account for $\frac{3}{4}$ or more of subscribers for several major providers

New subscribers prefer ad-supported access options to reduce costs

While still a lower %, Netflix has close to 50 million ad-supported subscribers and growing

FAST Viewers are steadily growing across providers



~35% of adults use a FAST service on monthly basis

Viewership will surpass 120 million in 2026

Viewers drawn to FAST services for stress-free, easy to navigate user experience

Streaming providers offering linear TV content

Next Day Model

hulu

Grey's Anatomy

Abbott Elementary

The Bachelor

9-1-1

Chicago series

Dateline

Law & Order

Real Housewives series

peacock

Sports

prime video

NFL - TNF

NBA – Friday nights

NETFLIX

NFL - Christmas doubleheader

ROKU

MLB – Sunday afternoon games

Streaming “Syndication”

hulu

The Golden Girls

Cheers

The Fresh Prince of Bel-Air

Twin Peaks

Frasier

Being Mary Jane

Paramount+

The King of Queens

Everybody Hates Chris

Growing Pains

pluto tv

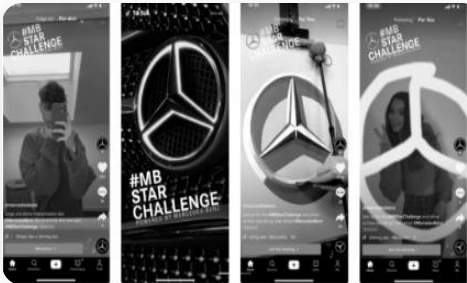
Lines Between Social Media and Streaming ALSO Continue to Blur



- Creators are breaking into streaming via licensing deals, original shows, and more.
- Both creators and brands have seen success rolling out more episodic content on platforms like TikTok

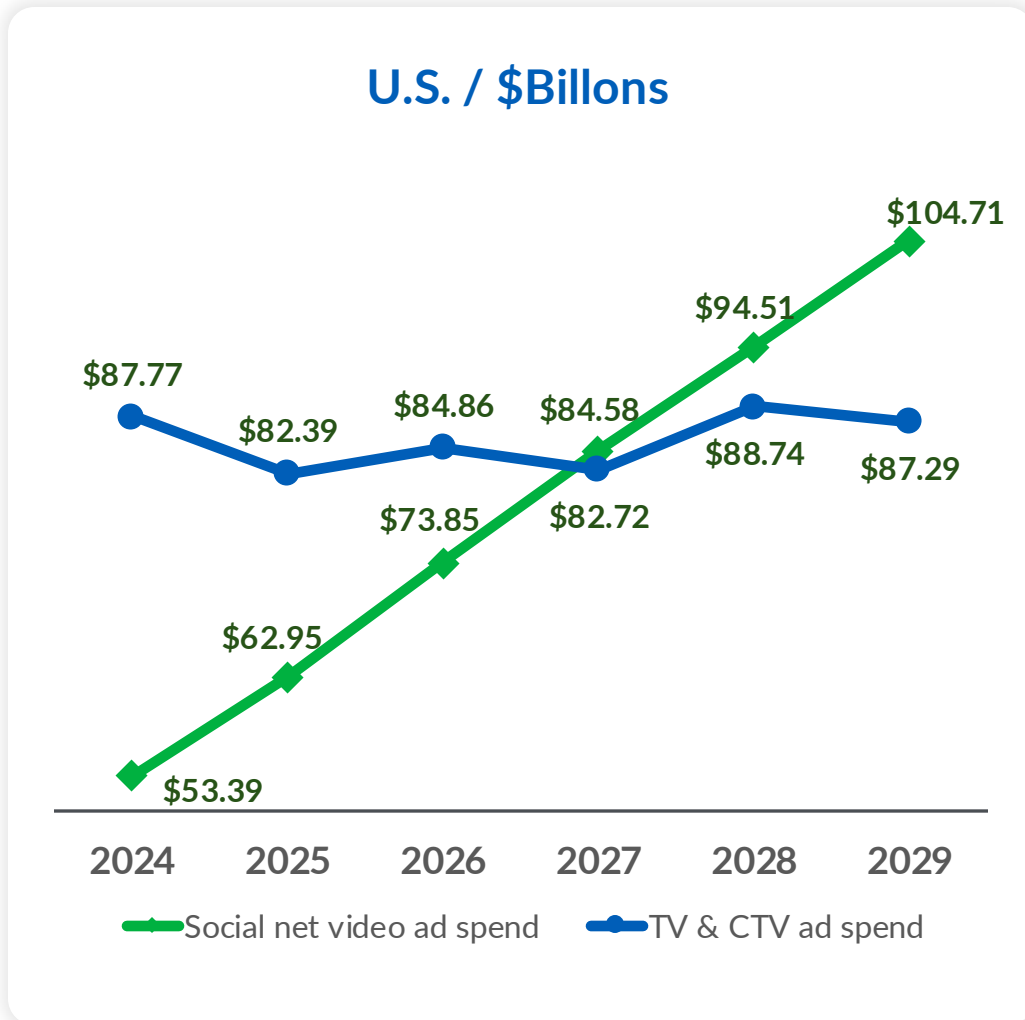


- Video-first social networks Instagram and TikTok have a leg up.
- These two platforms capture more than half of all advertising spend on social networks and lead in time spent among users.



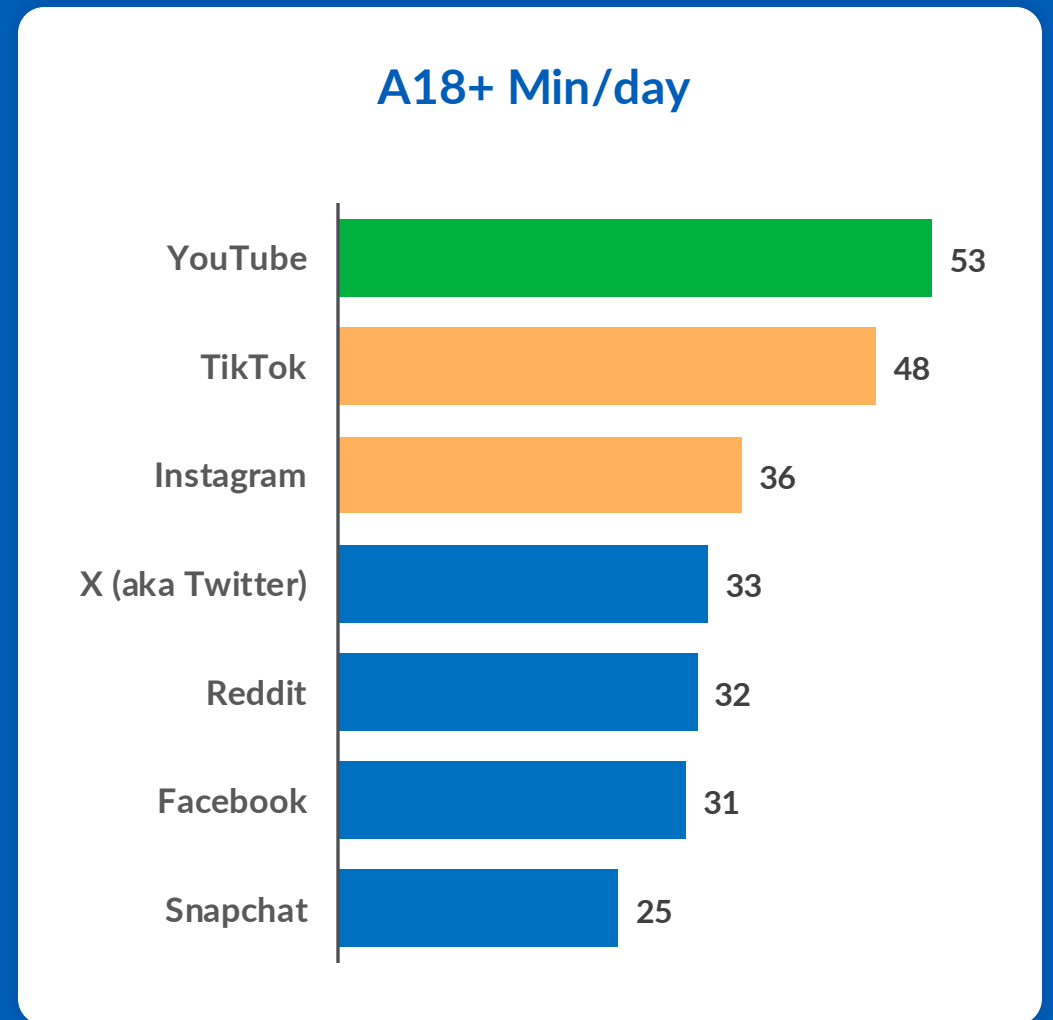
- US social video ad spend estimates by some forecasters to surpass TV and CTV by 2027

Social video ad spend \$



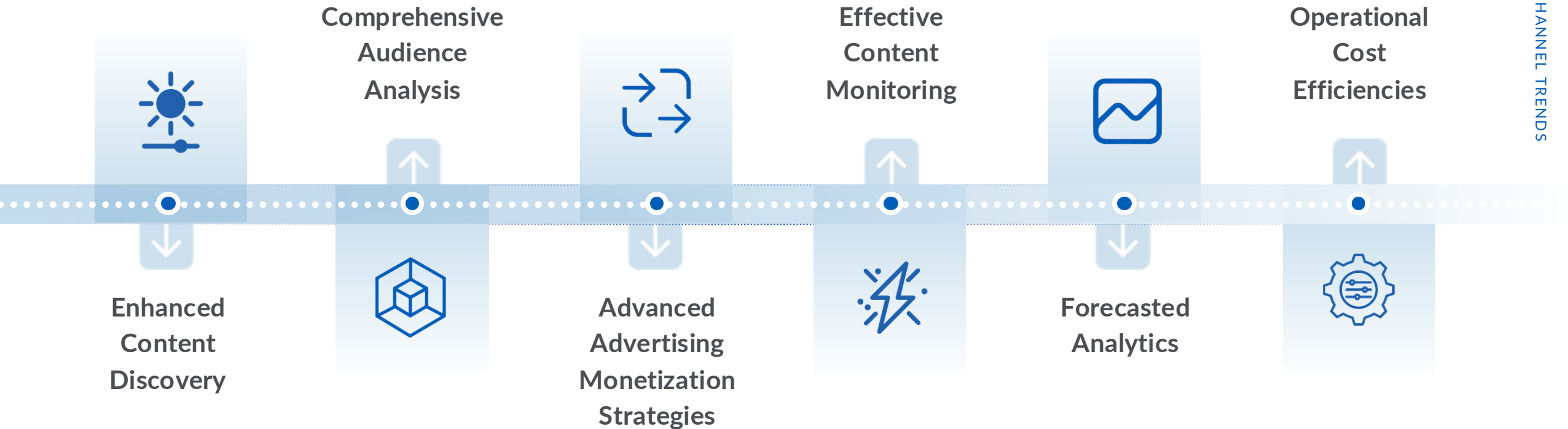
Source: eMarketer: Social Video 2025 – July 2025

Video-first platforms lead in usage



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**.

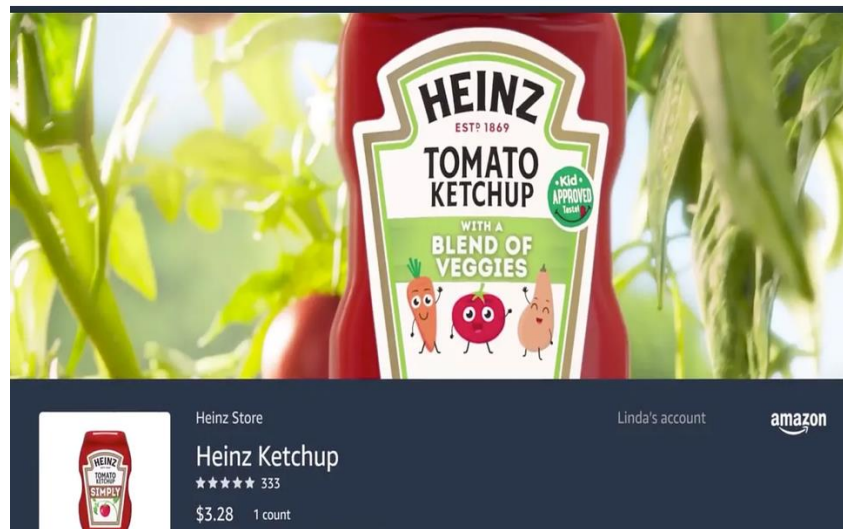
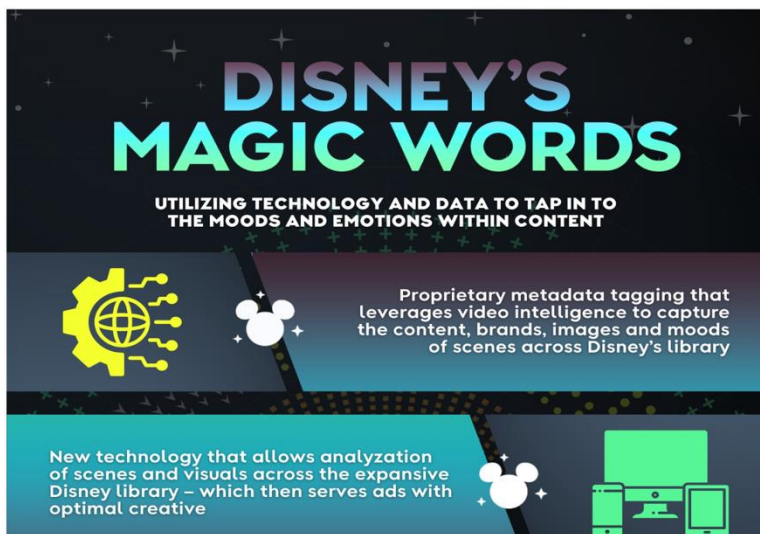


Using AI for personalization and more

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

“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



Disney Magic Words

amazon Shoppable

ESPN+ Direct to Consumer

Audio

Audio

Radio is Relevant!



OTA still leads audio space across most demos, meaning brands should keep radio in the mix for broad reach in 2026 plans

Video Podcasts



Video offerings are blurring the lines between audio & video, pushing marketers to test video podcasts as a way to expand engagement

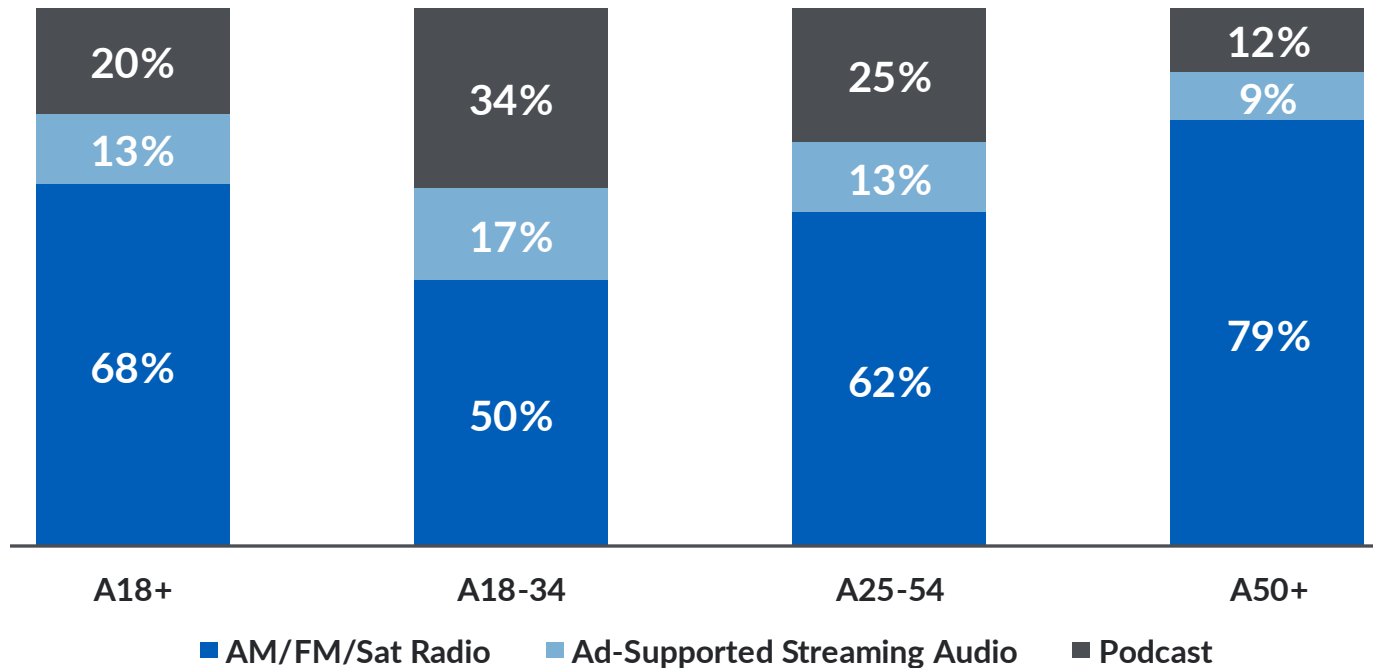
Audio Innovations



AI and new tech are enhancing audio experiences, encouraging brands to explore innovative formats that create deeper listener connections

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 Q1 2025
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+):

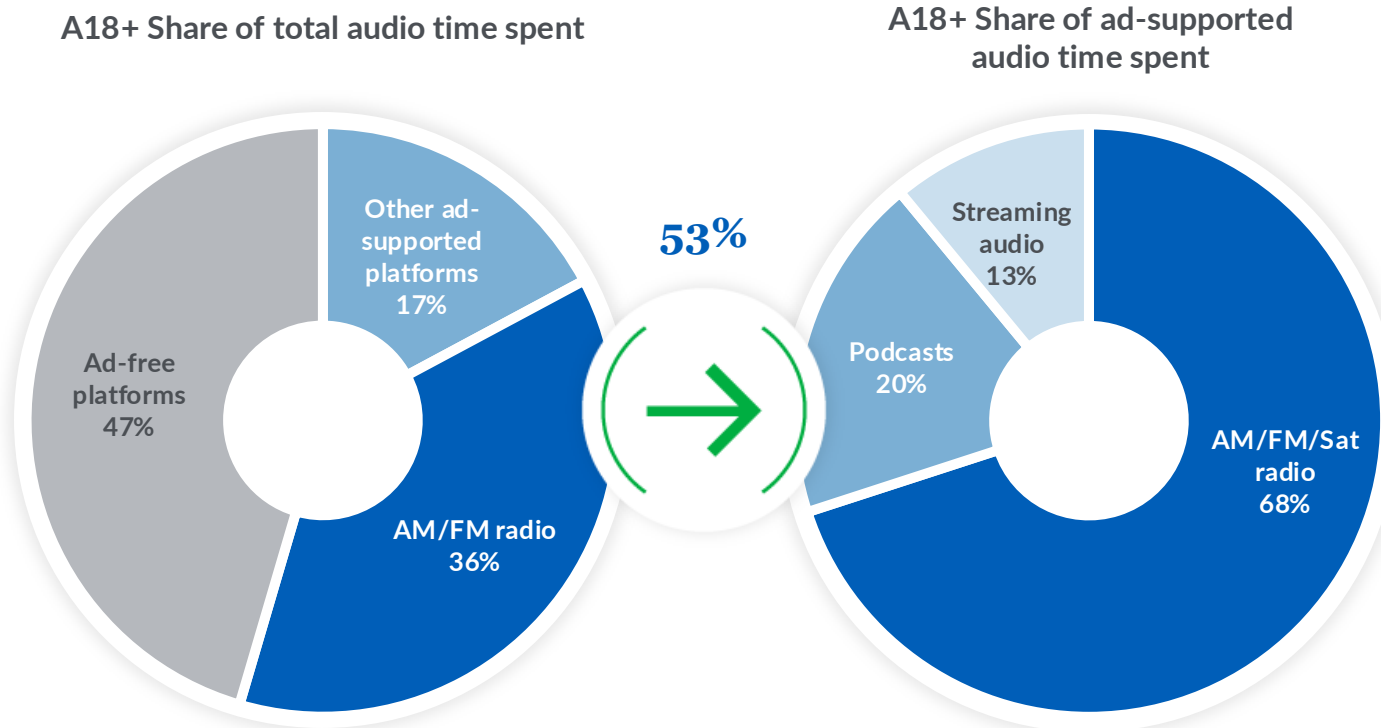
68%
AM/FM

3%
Satellite Radio

*Includes Radio

53% of Audio Time is Ad-Supported

AM/FM Radio Still Owns Largest Share



Source: Edison Research, Share of Ear Q1 2025, P18+
Podcasts listened to on streaming platforms are included in 'podcasts'

Majority of listening is now ad-supported

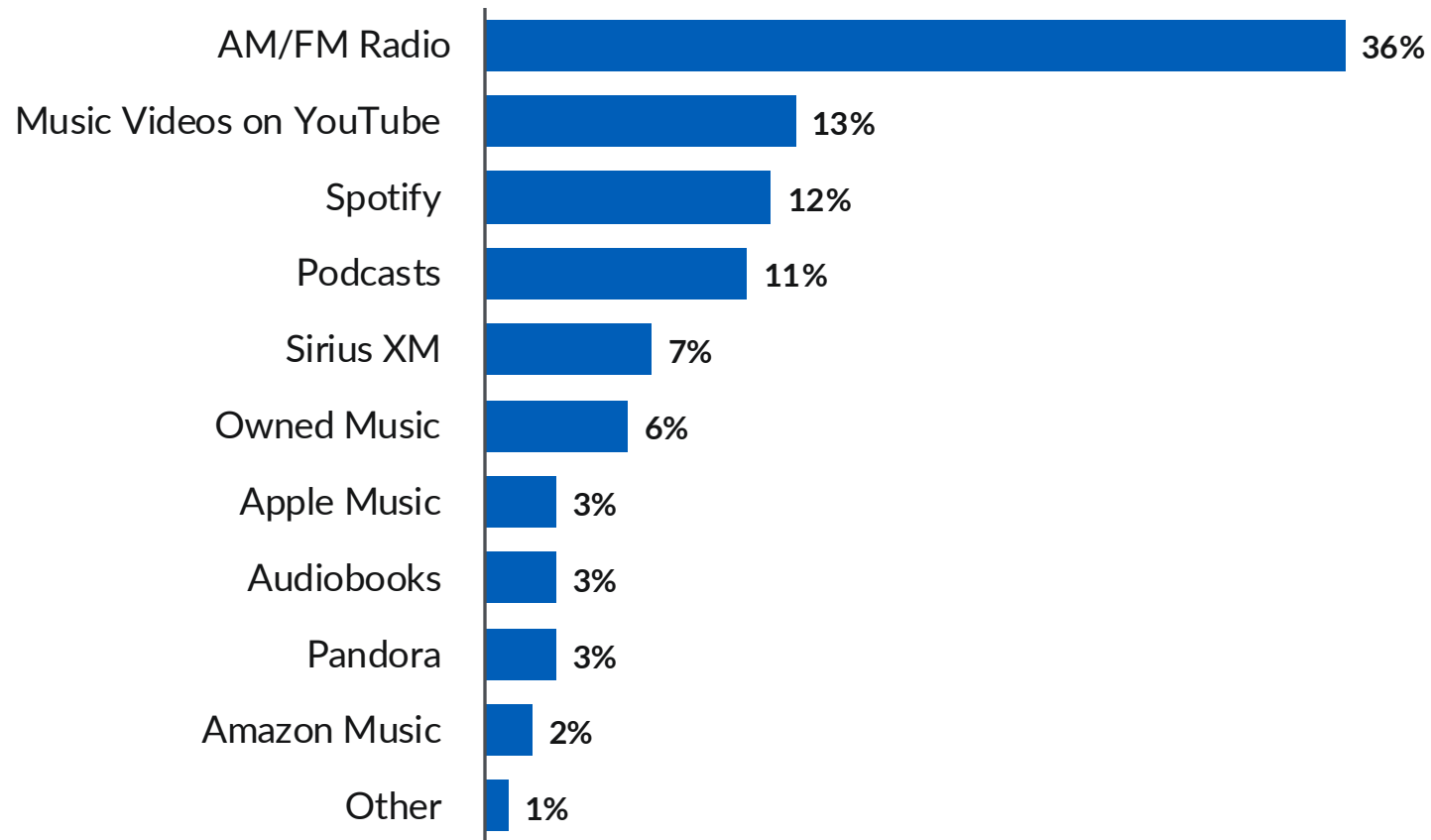
Top ad-supported streaming audio:

5%
Pandora

5%
Spotify

*Includes Radio

Share of Audio (Both ad-free and ad-supported) Time Spent Among A18+



Sources: Edison Share of Ear Q1 2025

Traditional radio continues to lead audio consumption, more than double any other platform

Podcasts listening continues to grow, signaling increased trust and preference for this content.

Spotify leads among streaming platforms, but majority of usage comes from ad-free (7%) vs. ad-supported users (5%)

Podcast, Live Radio and Video

- 32% of weekly podcast consumers use a smart TV for their podcasts
- Over 30% of video podcast are watched via YouTube
- Spotify houses over 250,000 video podcasts
- 85% of US podcast listeners have watched a video podcast
- 72% of weekly podcast listeners 13+ have enjoyed video podcasts actively
- Local radio personalities are live video streaming their shows

Podcast coming to a stage near you

- Live road shows and events
- Connect brands with superfans

Sources: Edison Share of Ear Q1 2025, Acast Study



In-Dash Video Ads on Terrestrial Radio

- Visual ads appear on dashboard as texts, logos or images
- 90% of cars are now digital audio enabled



SiriusXM ad-tier on music channels

- Later this year, Sirius is adding a low-cost ad tier to several music channels starting with eight

AI in Streaming & Podcasts

Personalization & Recommendations

- Machine learning models recommend new tracks, playlists and podcasts
- Home screen recommendations are dynamically curated based on a user's listening history and preferences

Optimization

- AI-Driven Targeting: Advanced models optimize ad delivery and improve campaign targeting precision, increasing relevance and reducing fatigue

Generative AI for Scripting

- Leverage generative AI for script and voiceover creation and for mixing background music for audio ads

Innovative Audio

Platforms and devices that are growth areas for Digital Audio

Wearables

Over 40% use wearables everyday



Connected TVs

100% of Connected TVs have access to Audio Apps



Mobile Gaming Audio

190 million adults are mobile gamers



Out of Home Audio

Reaches 130+ million consumers monthly while on-the-go



Smart Appliances

45% of Americans own a smart appliance



Audio Articles

Text-to-speech ad opportunities are projected to double in 3 years



Social

Social

The Impact of AI on Social



AI is touching everything from creative, to audience expansion and beyond, making human input from the start more important than ever

New Social Platforms are Emerging



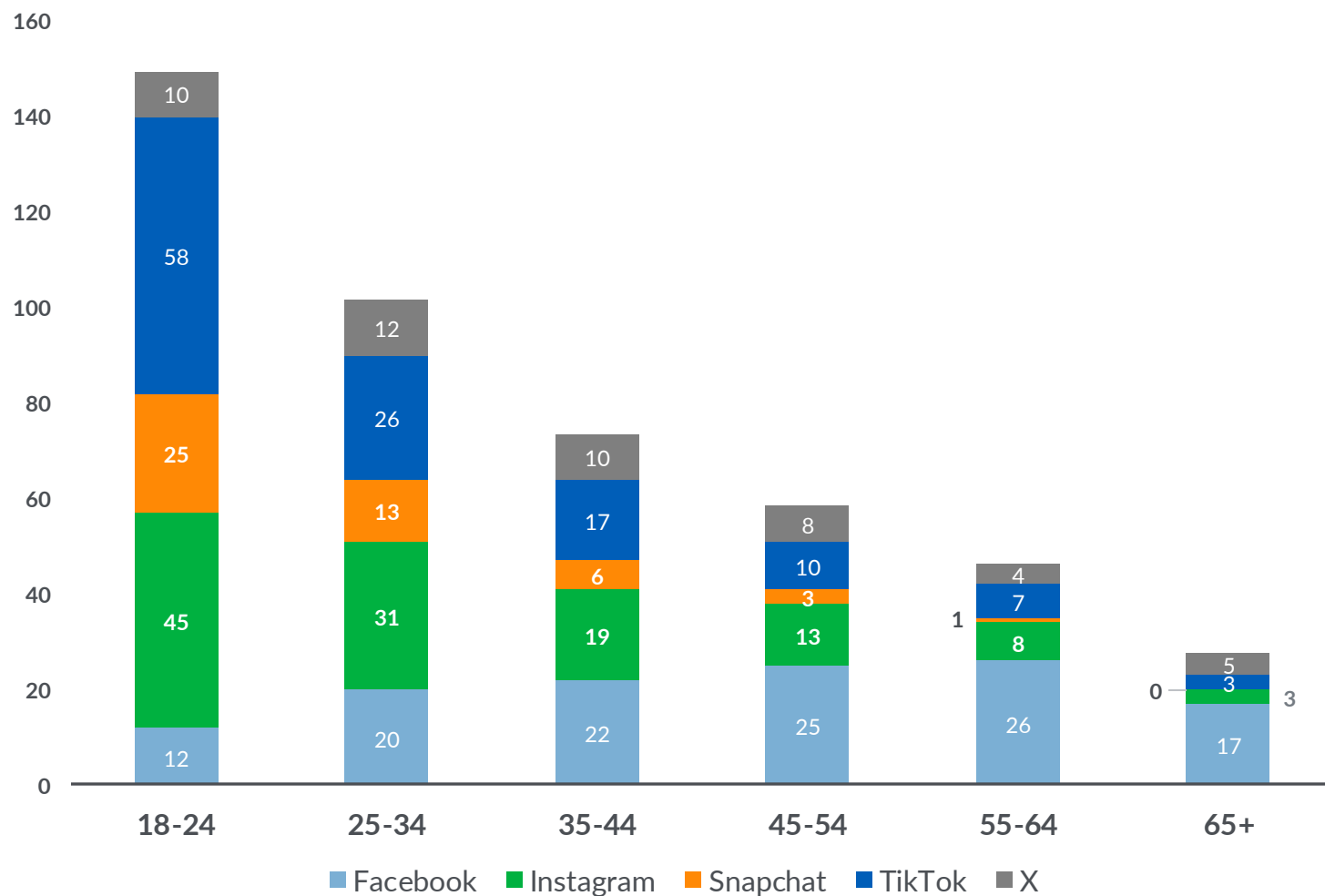
Platforms like Threads and Reddit are showing growth potential, forcing marketers to look beyond just the Metas and Snapchats when planning for their clients

Social is Infiltrating the Search Space



Video-driven social platforms are becoming more popular for product-based searches, meaning CPG brands have an even larger opportunity to succeed in the space

Average Time Spent with Social Platforms (in minutes)



Sources: eMarketer: Time Spent on Social Platforms by Age 2025

Adults 18-24 are the most active users, spending 150 minutes daily on social media.

Facebook dominates among Adults 65+, accounting for nearly all their time spent on social platforms.

Adults 35-54 reflect a transition phase, balancing legacy platforms like Facebook with newer ones like TikTok.

AI Drives Optimization Decisions

1



Platform



Native AI Tools
Drive Campaign
Decisions

2



Precision



Continuous Growth &
Adoption Across
Platforms

3

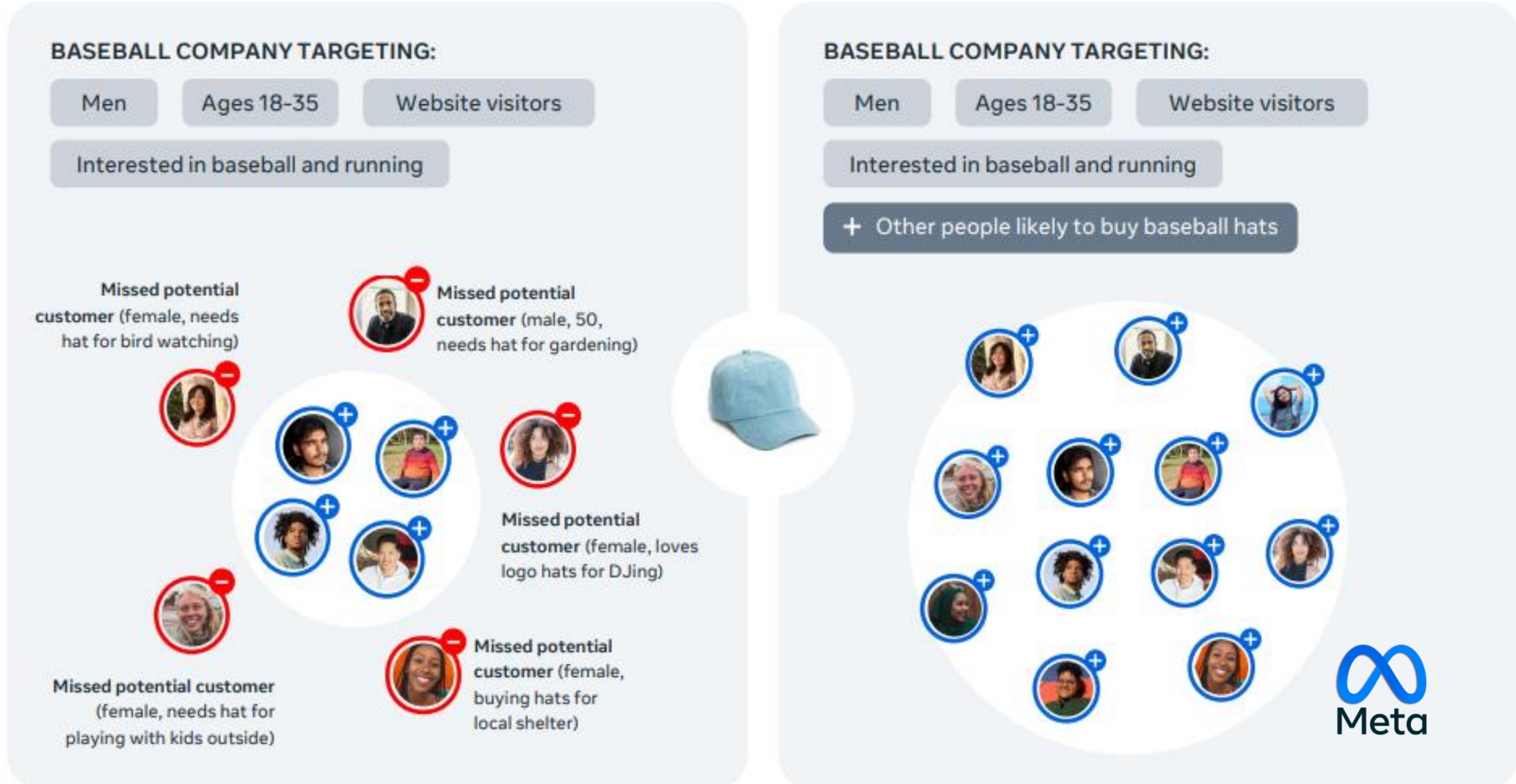


Prediction



Platforms Forecast
Campaign Performance
and User Behavior

AI Allows For Intelligent Audience Expansion



Sources: Meta Advantage+

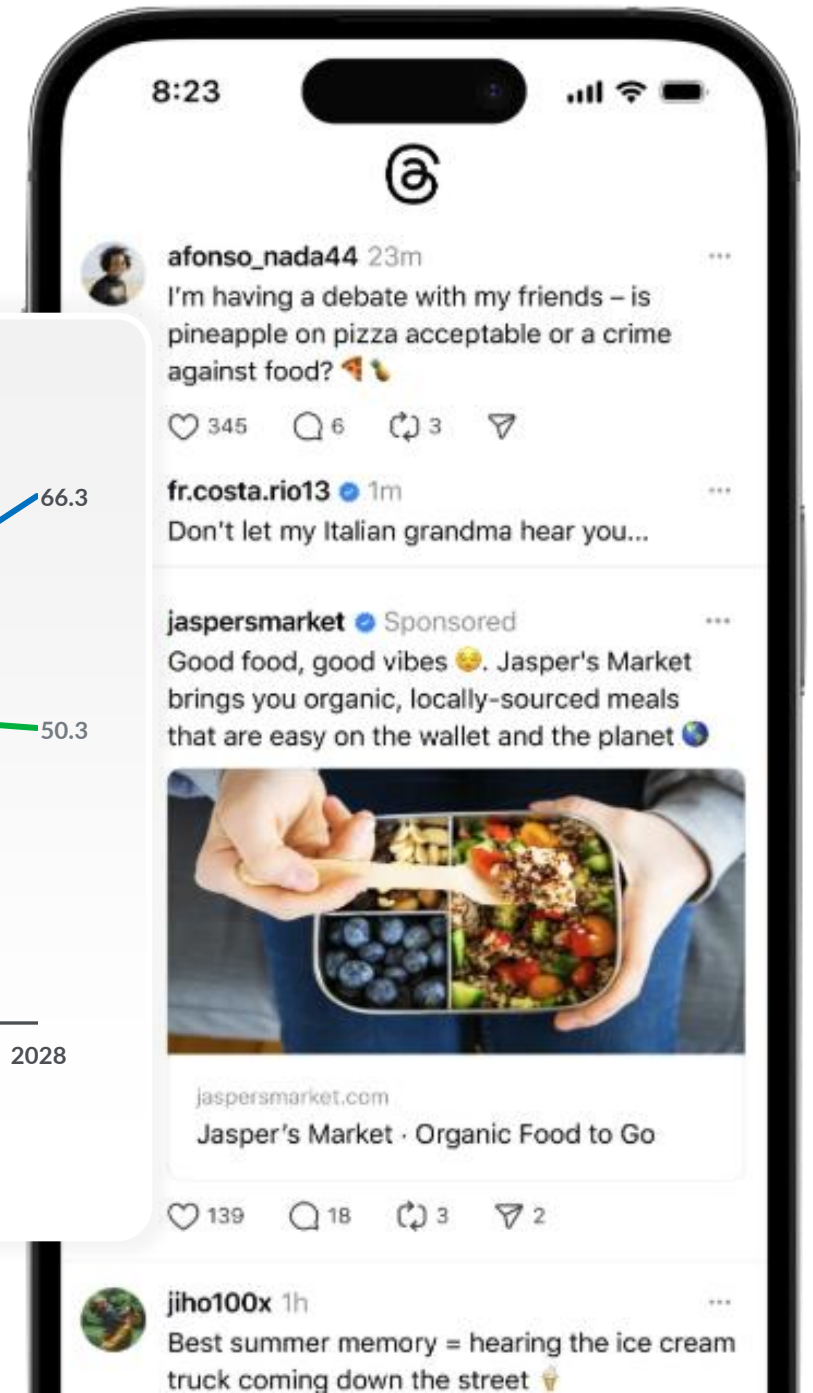
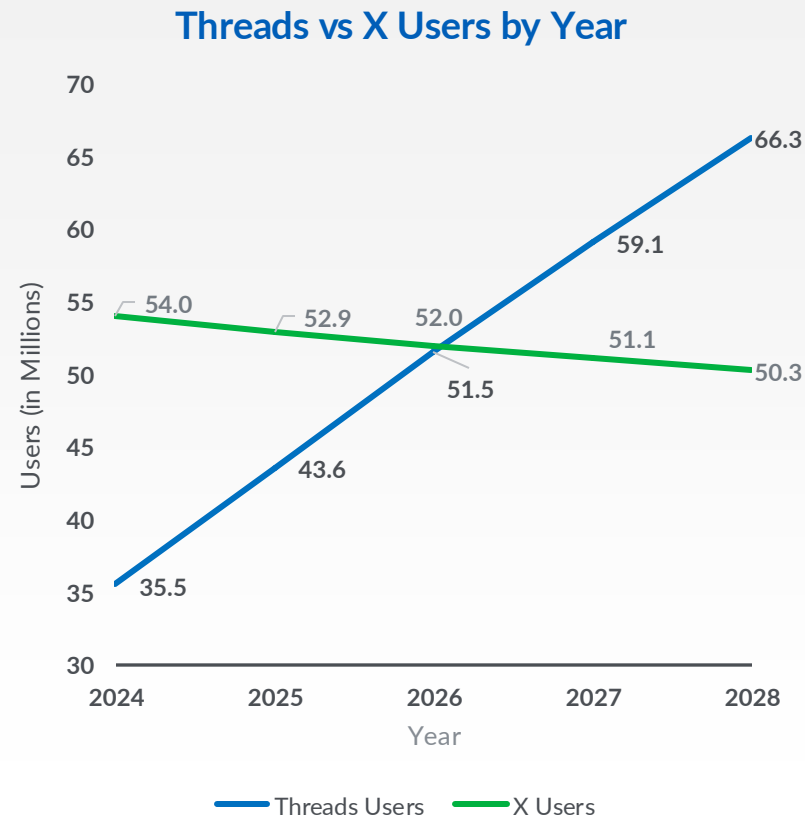
Emerging Platforms

Threads

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

Threads is projected to surpass X in US users by 2027.

Easily add Threads to your existing and new campaigns, using existing ad creatives that are designed for the ad format Single image or video.



Emerging Platforms

Reddit

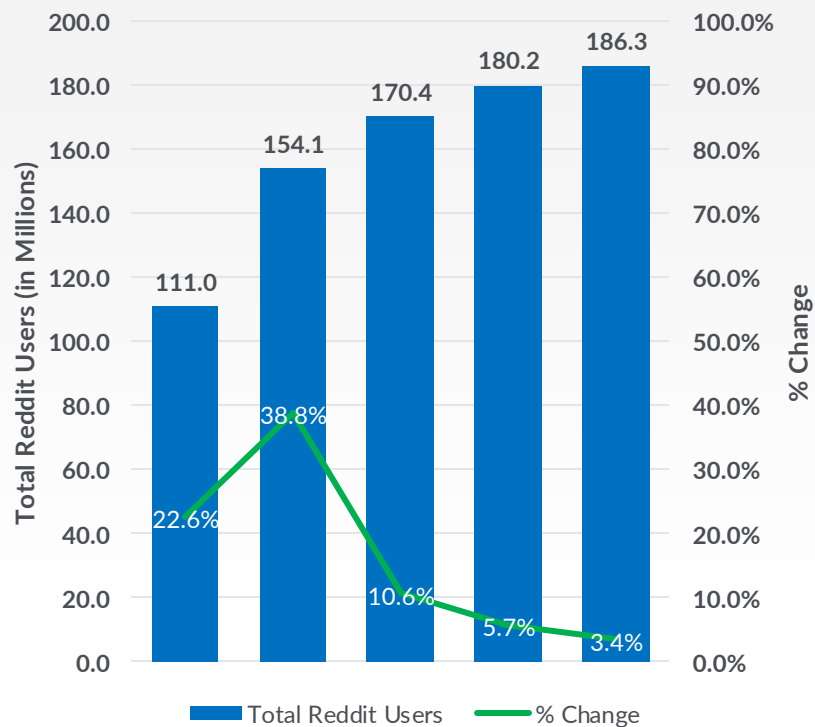


Reddit's user base and time spent are rising faster than other social platforms.

Brands can join conversations and communities where users are deeply invested.

Niche communities enable tailored connections with specific interests for more personalized engagement.

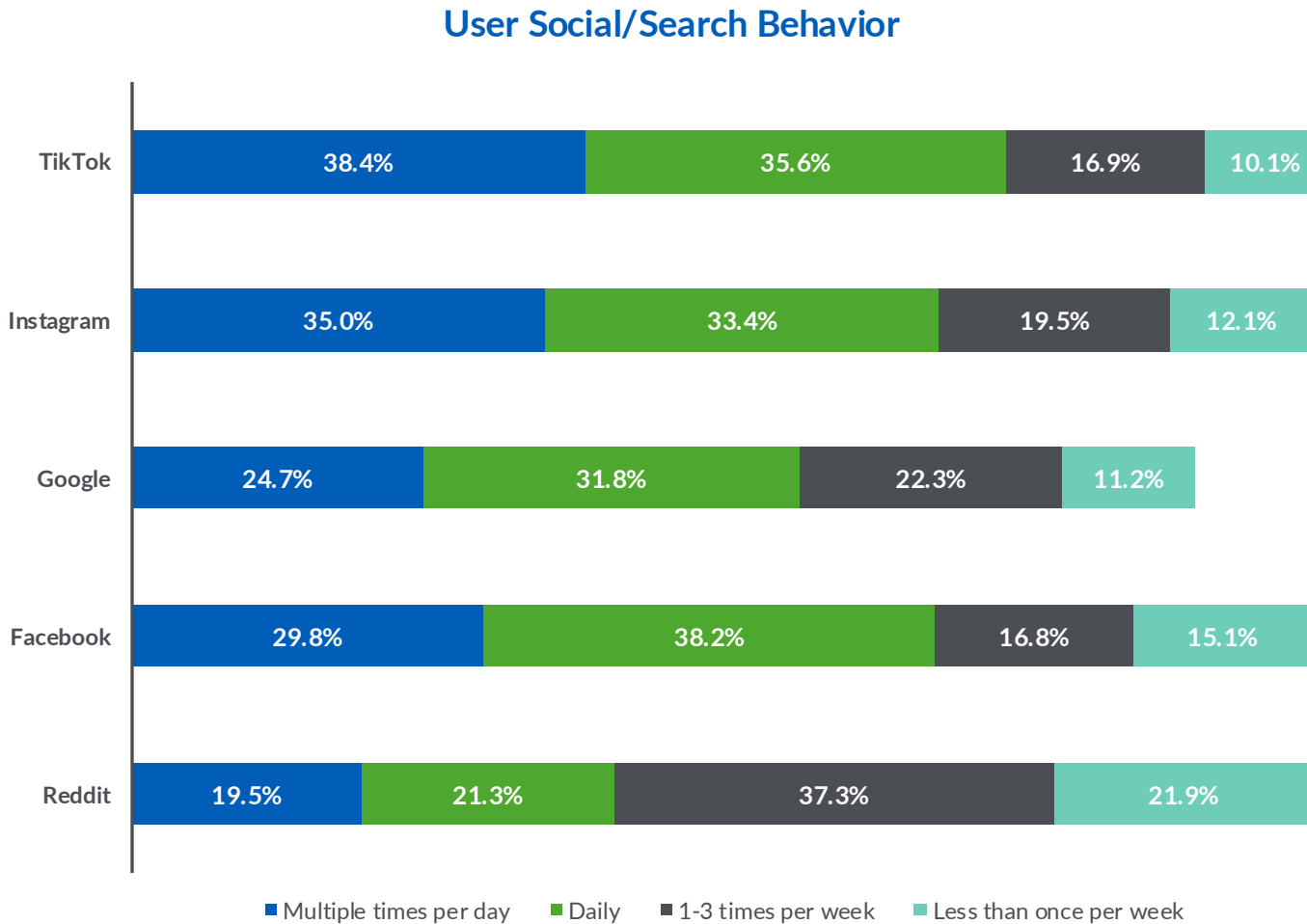
Reddit User Growth



Social Steps into the Search Spotlight

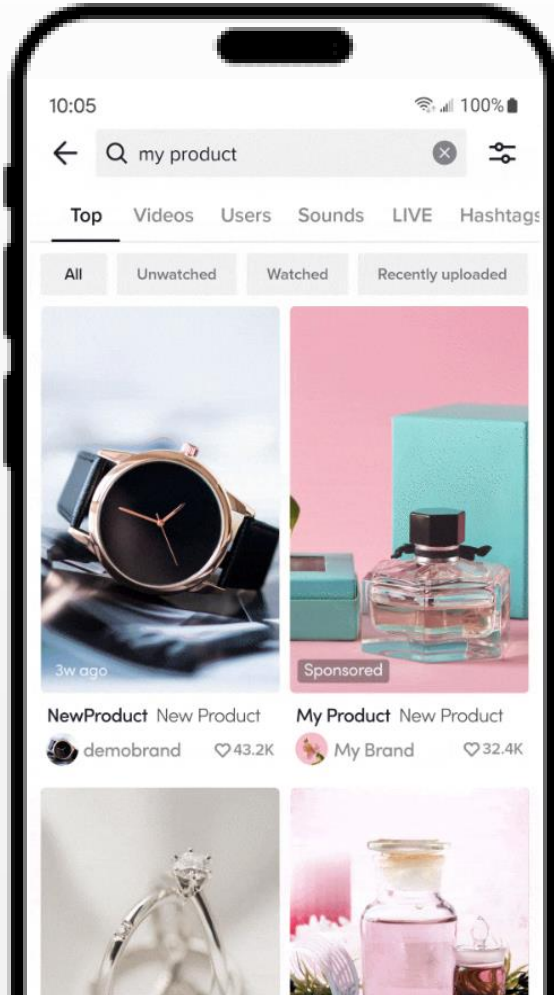
Today's customers want fast, digestible answers, and they're turning to platforms they already use daily to get them

TikTok and Instagram are being favored over traditional Search platforms such as Google



Source: eMarketer Social Search Usage and Trends 2025

Social: A Digital Shopping Mall



Search ads are labeled “Sponsored” and blend directly into organic search results

Captures users actively searching for products, services, or trends, similar to Google search intent but in a social context

Advertisers bid on trending and relevant terms, TikTok will also auto-match ads to searches

Can repurpose existing TikTok ads for search ads

79%

of adults also listed product descriptions, product images, & customer ratings as important

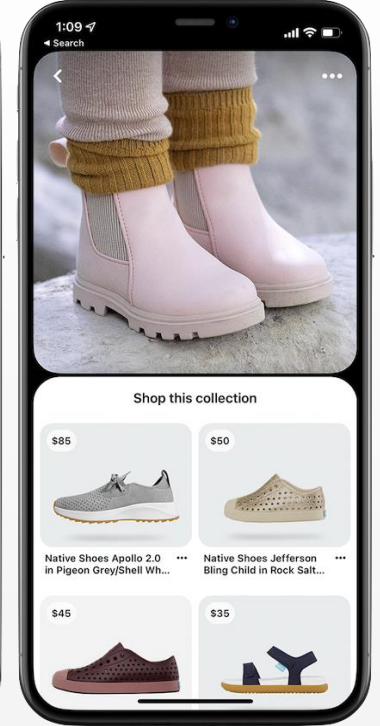
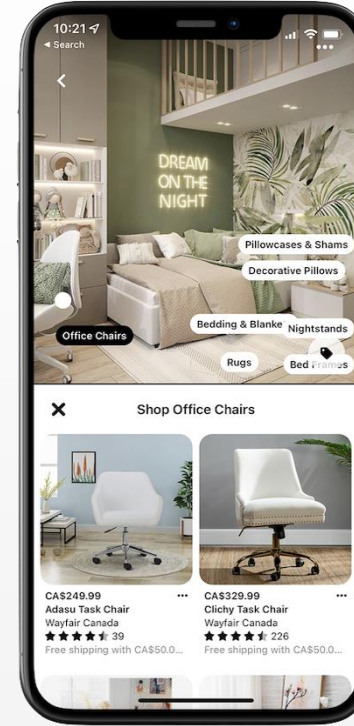
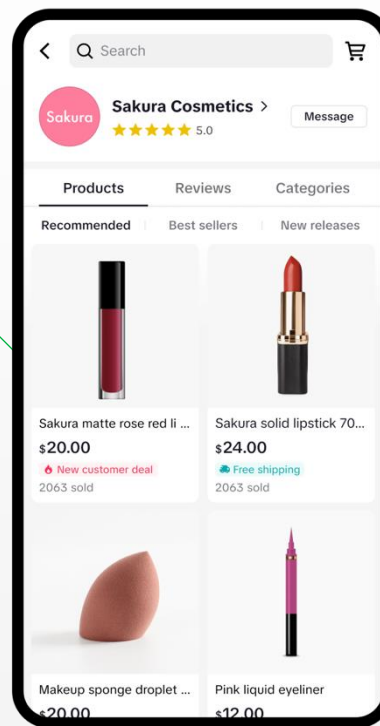
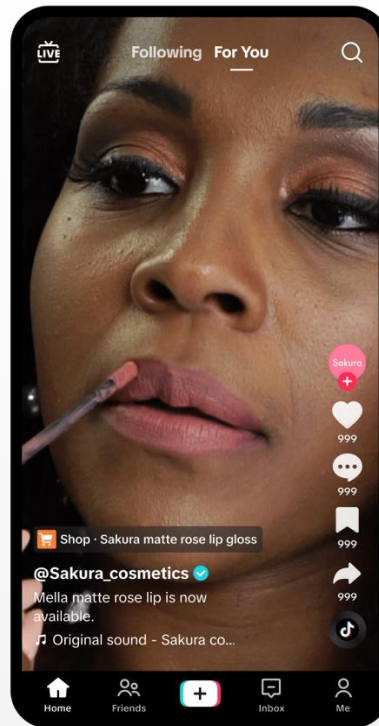
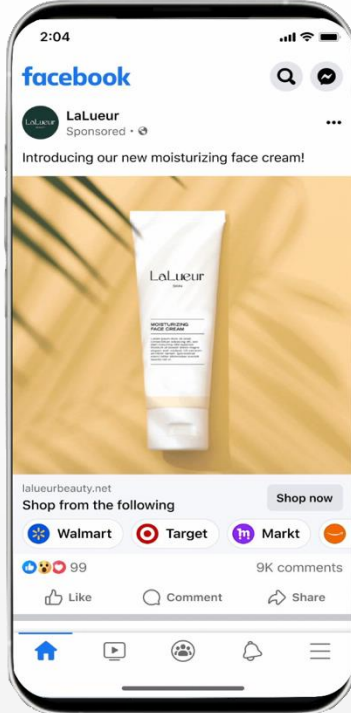
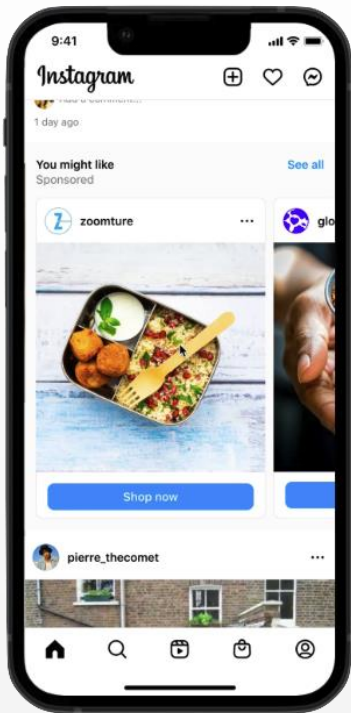
50%

of consumers want information on the quality of product materials

#TikTokMadeMeBuyIt



The Social Storefront, Visualized



Influencer & Affiliate

Influencer & Affiliate

The Rise of Niche & Micro Creators



These authentic and trusted creators are now leveraging the ability to sell directly on key platforms, making these smaller influencers more impactful at driving business outcomes for brands

Content is Shifting From Hi-fi to Lo-fi



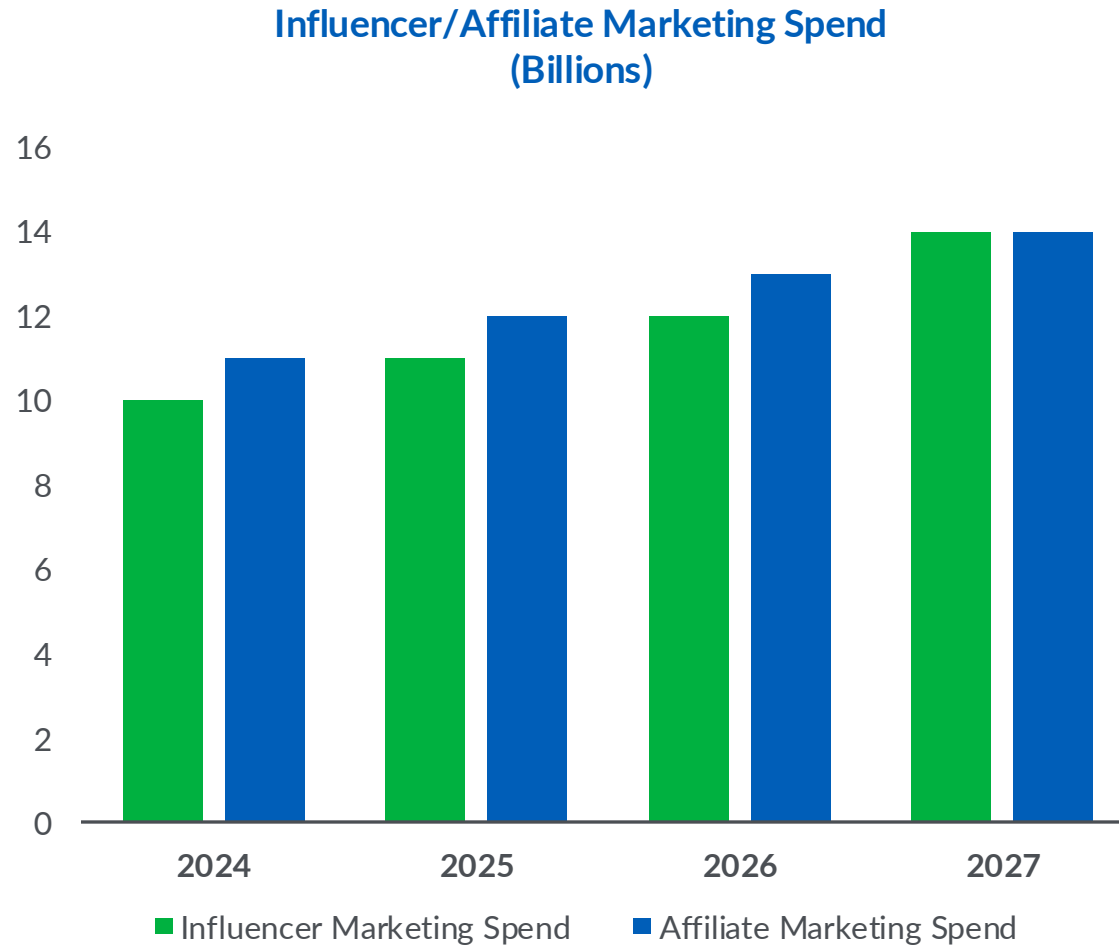
Engagement rates are trending higher on more authentic, lo-fi content than your traditional “polished” posts, meaning partnering with creators leaning into this trend is more important than ever

Leverage Moments to Inspire Creative Wins



Creators are now taking advantage of viral moments and trends, so a willingness for Brands to be nimble and lean into moments in “real time” is key

Influencer and Affiliate Spending



Sources: Influencer Marketing Measurement 2025, Influencer marketing set to surpass \$13 billion by 2027

In 2025, Influencer spend in the U.S. will hit 11 billion, seeing a 9% growth in spend from 2025 to 2026.

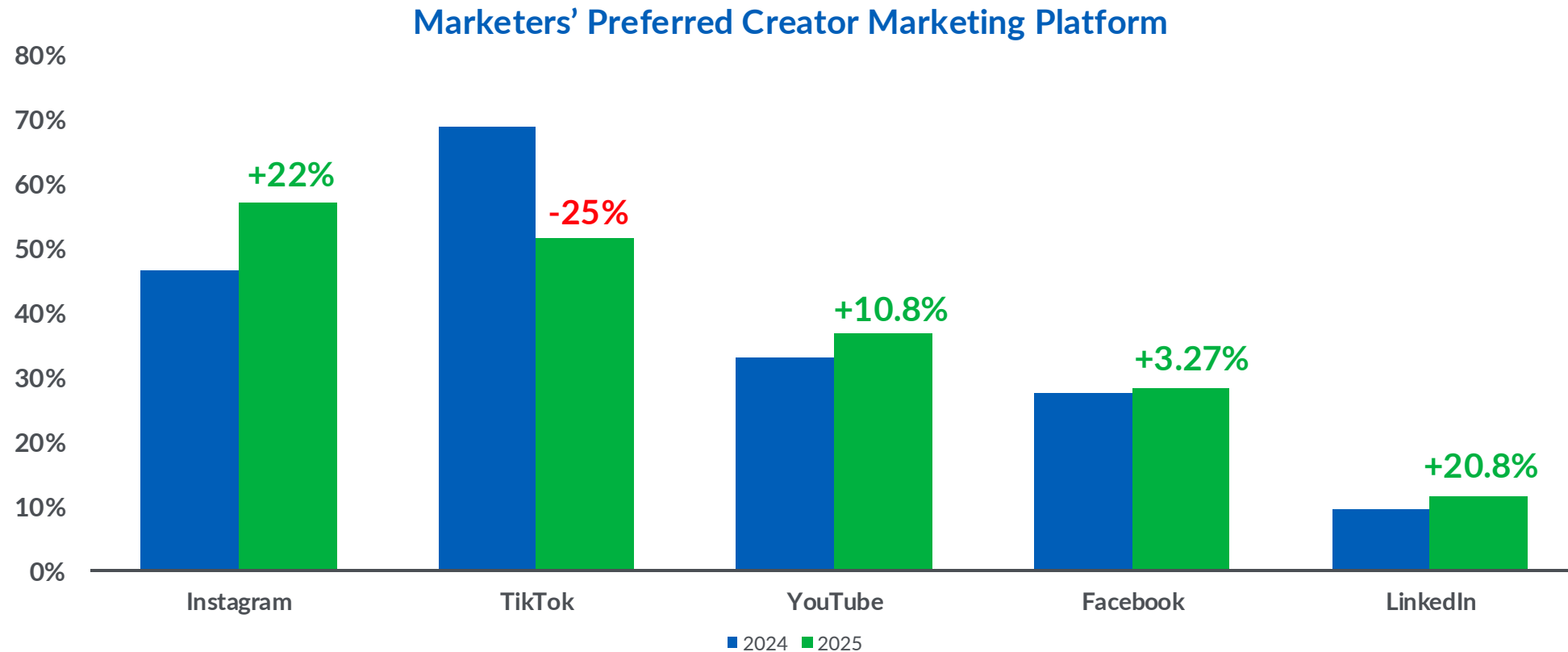
No longer just a campaign tactic, it's becoming part of the always-on brand strategy.

Affiliate will see an 8% increase in spend between 2025 and 2026

Affiliate finds the most success in enhancing customer loyalty, generating leads, and brand awareness

Marketers' Platform Preference is Evolving

With audiences and creators tapping into new platforms, creator marketing succeeds outside of the tried-and-true platforms of the past



Niche & Micro Creators

Driving Performance Through Authenticity

Digital campaigns are decisively shifting towards authentic, niche, and micro-influencers. These influencers, with their strong audience trust and relatable content, are proven to drive conversions more effectively than mega influencers.

Why It's trending: High engagement, trust and targeted reach

Impact: Direct sales attribution, improved ROI



Where Influencers & Affiliate Marketing Meet

Enabling Seamless Creator-Driven Shopping

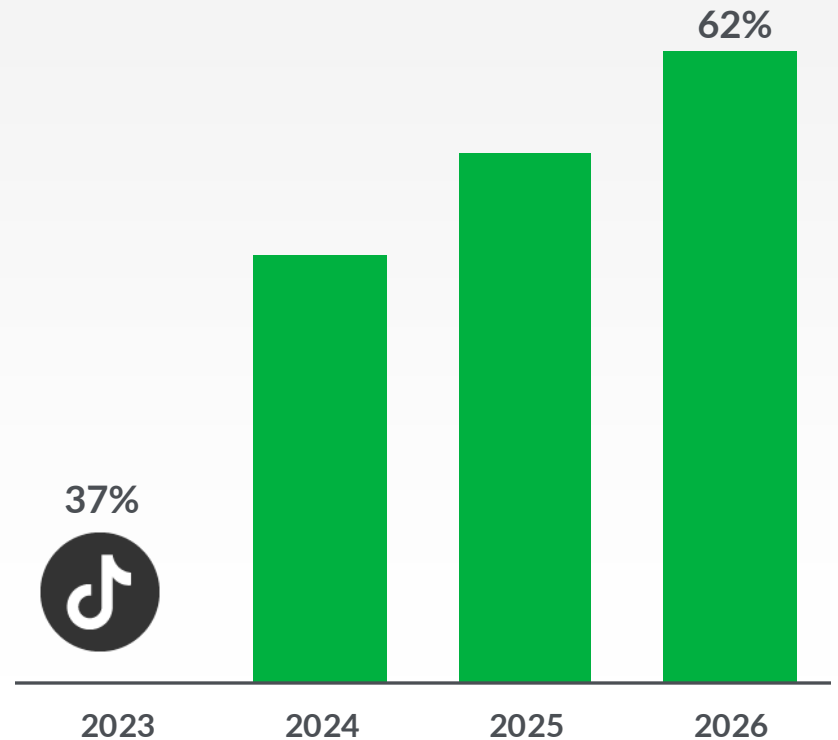
Platforms are empowering creators with better shopping integration and affiliate tools, driving a rise in collaboration posts and direct commerce opportunities.

Why It's trending: Top creators help brands stay current by reacting to viral moments.

Impact: Direct sales attribution, improved ROI



U.S TikTok Users Who Made a Purchase in-app



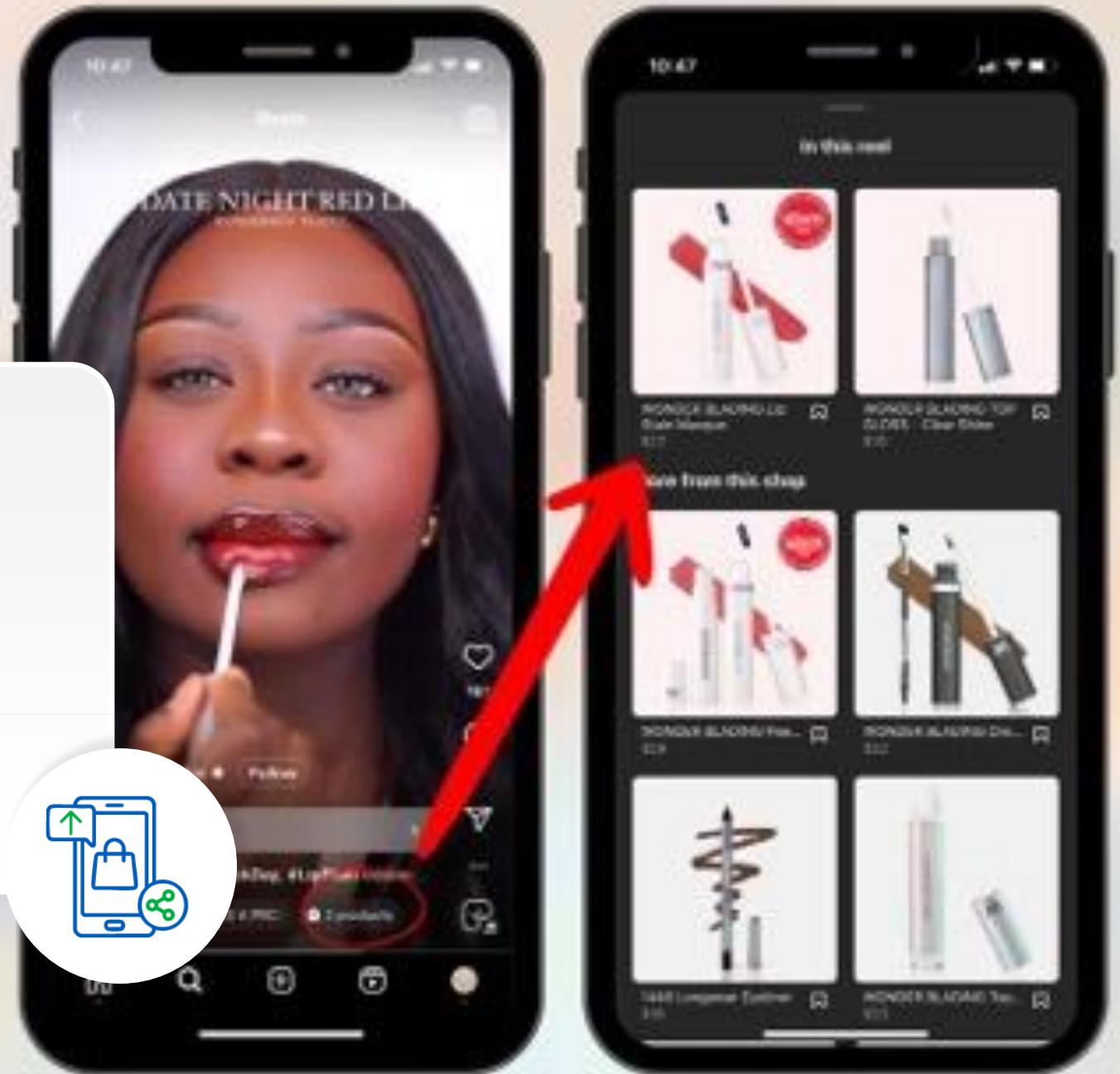
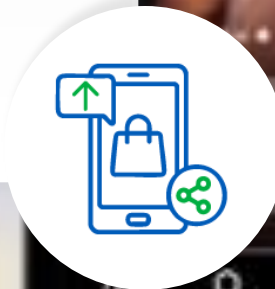
The New World of Live Selling

Deepening Audience Connections Through Format Innovation

There is a trend towards immersive, relationship-driven content, such as live streams and long-form storytelling, which outperforms traditional celebrity-based formats.

Why It's trending: Live selling & authentic content deepen engagement

Impact: Higher conversion rate, longer customer



Lo-Fi, For the Win

Authenticity Over Polish

- Less polished, creator-led and user-generated content continues to outperform heavily produced ads in both organic and paid placements.
- Feels natural in-feed and aligns with platform-native behavior.
- Higher engagement, stronger audience trust, and lower production costs.

Influencer-Produced Creative



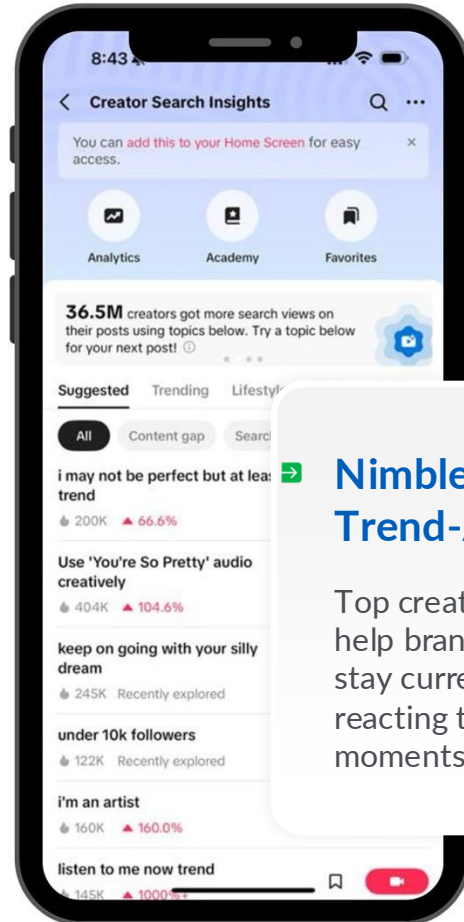
Brand-Produced Creative



55%

of brands work with creators and influencers to build credibility and trust (eMarketer, 2025)

Aligning Creative with Culture

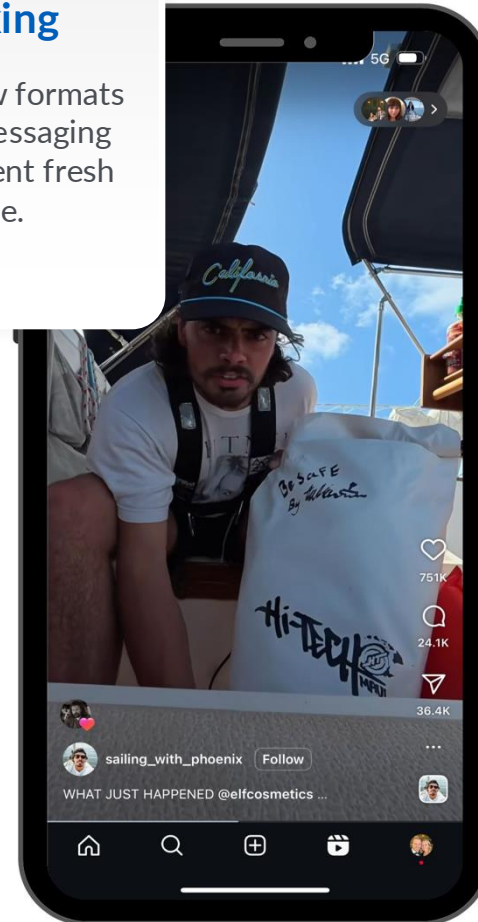


Nimble & Trend-Aware

Top creators help brands stay current by reacting to viral moments.

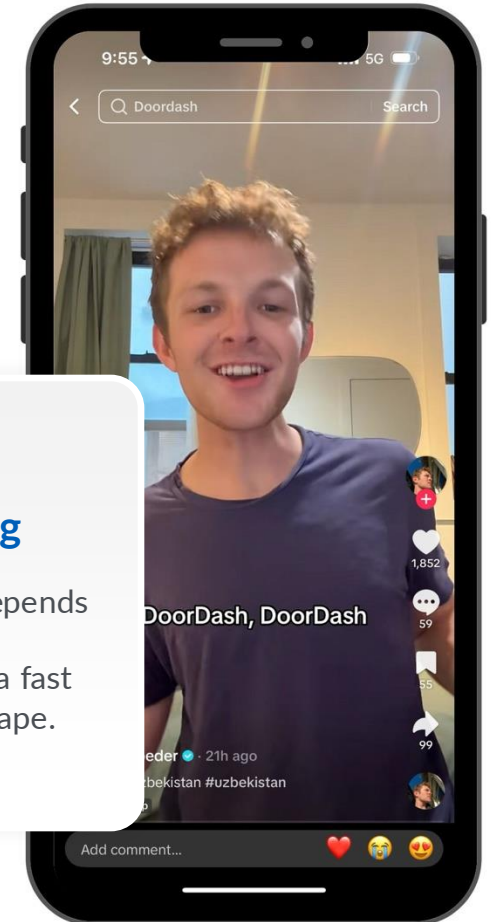
Creative Risk-Taking

Testing new formats and bold messaging keeps content fresh and relatable.



Timing is Everything

Relevance depends on real-time execution in a fast digital landscape.



Search

Search

LLMs Stepping On Google's Turf



Large Language Models (LLMs) are now functioning as primary search engines and are changing how people discover brands, forcing marketers to evaluate and actively participate in how Brands are being represented in LLMs

Brand Engagement Beyond the Click



Feedback loops between paid ads, SEO content, and AI models are necessary, so now marketers must re-think “measurement” in space that no can no longer rely on traditional methodologies

No Landing Page? No Problem!



Landing Pages will evolve into dynamic, AI-built experiences. Content, headlines, CTA, and even images will be created based off performance data and real time signals, forcing brands and marketers to decide if this new dynamic space is right for them, or if they prefer to control the narrative

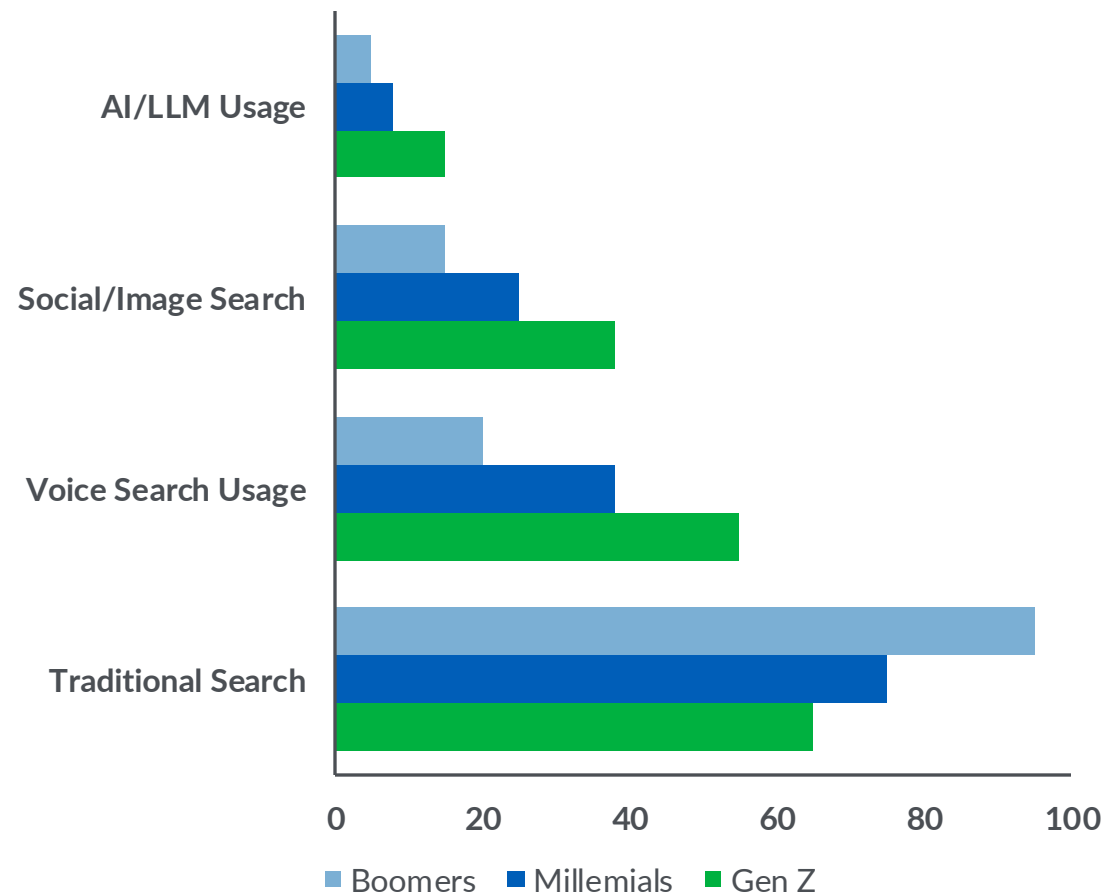
Generational Shifts in Digital Behavior

Gen Z and Millennials shifting away from Google: Younger users increasingly turn to social platforms like TikTok and Instagram or conversational AI tools like ChatGPT instead of traditional search engines.

Platforms replacing search engines: For Gen Z, 45% now prefer social media search over Google (compared to only 10% of Boomers), TikTok has especially emerged as a go-to for queries like recipes or product recommendations

LLMs gaining ground: Around 62% of people now use LLMs to search for products or services, signaling a shift toward AI-driven search experiences

Internet Behavior by Generation (2025)



Source: Claneo State of US Search 2025

Estimated Market Share Shift to LLMs (2025 vs. 2026)

Channel Type	2025 Estimate	2026 Estimate
Traditional Search	\$251B (90%)	\$256B (80%)
LLM-Based Search	\$22B-\$28B (8-10%)	\$48B-\$64B (15-20%)
Other Channels (voice assistants, apps, etc.)	\$6B (2%)	\$16B (5%)
Total	\$299+B	\$320+B

Not only will LLMs take 15–20% of all search volume, they’ll dominate high-value, upper-funnel, research-intent queries. That’s where brand preference, content quality, and trust signals will matter most—and where SEO and PPC strategies need to evolve fastest.

Beyond the Click

Feedback Loops Between Ads, Content, and AI Models

As generative AI becomes a mainstream discovery and decision-making tool search marketing is no longer just for users—it's also for machines.

Paid ads, landing pages, and organic content all serve as inputs that influence how AI models perceive and represent your brand. Every ad click, blog post, and user behavior signal helps shape how large language models interpret and recommend your brand.

That's the feedback loop: content and campaigns feed performance data and semantic signals into models, which then learn from, prioritize, or exclude brands in their generated answers.

In short: Marketing performance now influences AI comprehension, not just human perception. Your assets are just for selling, they'll be used for training.

Retail Media

Retail Media

Investment Trends are Slowing



Investment growth is decelerating, so brands should prioritize efficiency and optimize spend to maximize impact in retail media

Dollars are Shifting Off-Site



Retailer audiences are extending beyond owned platforms, meaning marketers should activate off-site buys to scale reach and leverage first-party data

Growth is in Video



CTV and programmatic video are surging, pushing brands to allocate more retail media dollars into video to capture growing consumer attention

Retail Media Budgets Are Growing Slowly

- Retail Media spending makes up ~18 % of all US digital ad spend in 2025
- 71% of advertisers now rank incrementality/ROAS as their top success metric

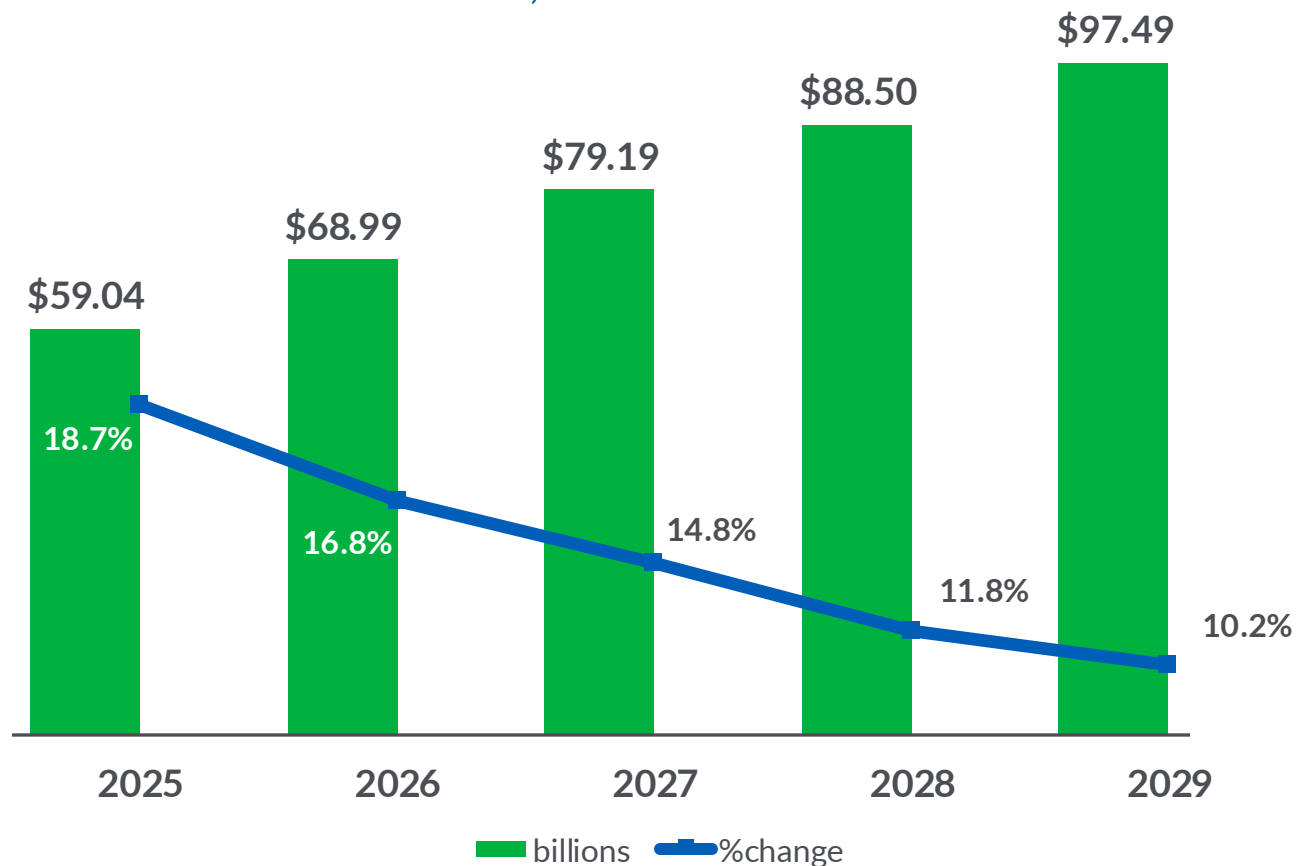
Sources:

eMarketer "Measuring what matters in retail media's boom with incrementality" June 2025

Adtelligent "Retail Media Market Outlook 2025: Key Data and Growth Forecast" June 2025

IAB "2025 Outlook Study: A Snapshot into U.S. Ad Spend, Opportunities, and Strategies for Growth" January 2025

Retail Media Ad Spending
US, 2025-2029

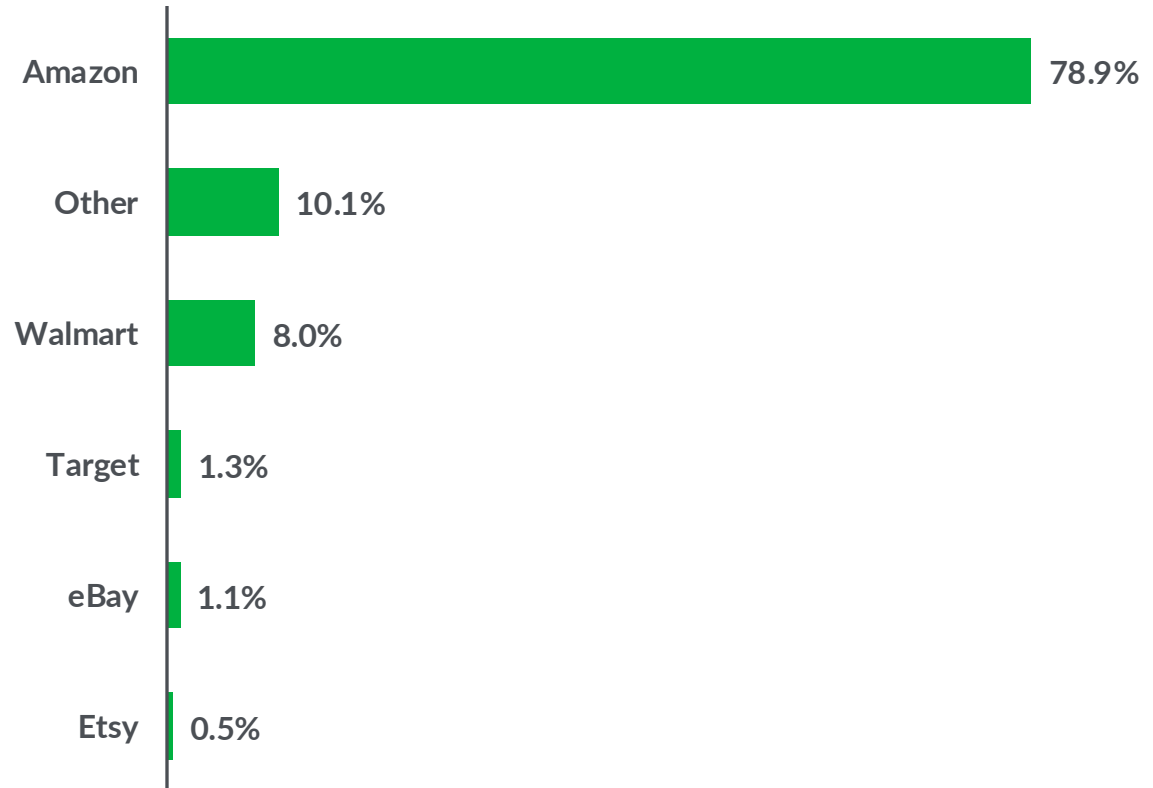


Amazon Continues to Lead

On the Rise

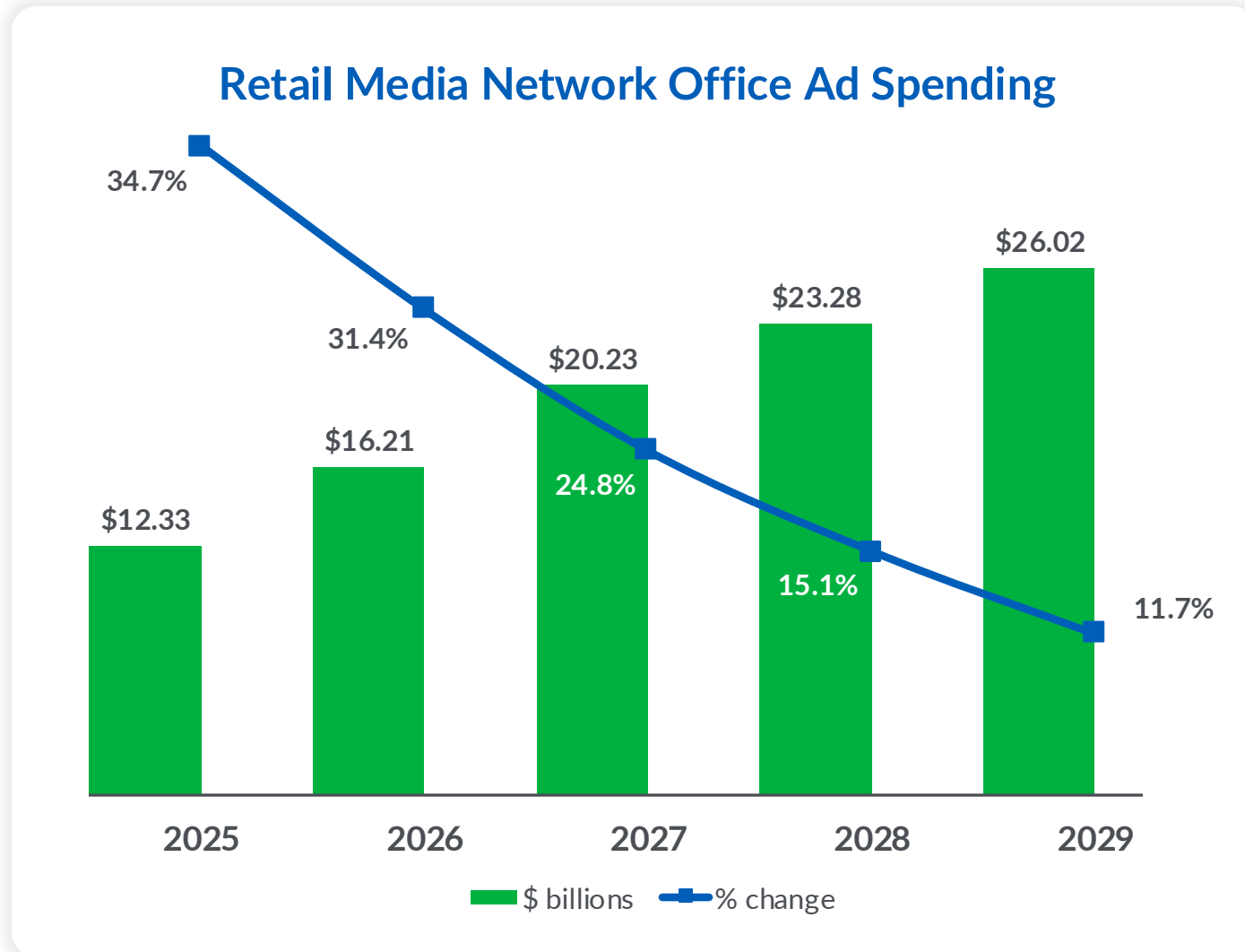
- Walmart is focused on improving attribution – linking brick-and-mortar purchases to online media engagement
- Brands with significant name recognition (Home Depot, Kroger)
- Smaller retail players have continued to launch their own networks to monetize their data/audiences

Retail Media Ad Revenue Share, by Company



Off-Site Dollar Dominance

- Off-site already commands roughly **21% of all retail-media dollars in 2025** and is on track to eclipse on-site display by late 2026, per eMarketer's placement breakdown
- Fragmentation advantage:** Once shoppers leave a retailer's site, **Amazon's share tumbles from 79% on-site to 69% off-site**, opening doors for Walmart Connect, Target Roundel, Instacart, and other midsize RMNs to win budgets.



Source: eMarketer "Off-site retail media ad spend growing much faster than on-site" April 2025
 MARTECH "IAB expects digital advertising growth to slow considerably this year" January 2025

The Rise of Video

Fastest-growing slice of RMNs: Retail-media video/CTV spend will increase by 46% in 2025 (roughly 3× faster than retail-search) and eMarketer forecasts that by 2027 fully **20 % of all US CTV ad dollars** will run through retailer data pipes.

Measurement is the choke-point: Despite enthusiasm, **60 % of CPG buyers say data silos and cross-channel blind spots still limit CTV scaling**, making clean-room integrations and unified incrementality tests the must-solve agenda for 2026 budgets.

46%

*of Consumers are more likely to remember an ad if its message relates to the content around it***

60%

of US CPG buyers say that reporting blind spots are a major concern, limiting total ad \$ investment

Out of Home

Out of Home

Measurement, Attribution & ROI Pressure



Opportunities to measure OOH continue to grow, giving clients stronger ROI validation and confidence in their media investments

Creative is Becoming Dynamic



Real-time triggers enable personalized OOH messaging, pushing marketers to integrate dynamic creative into plans to stay timely and relevant

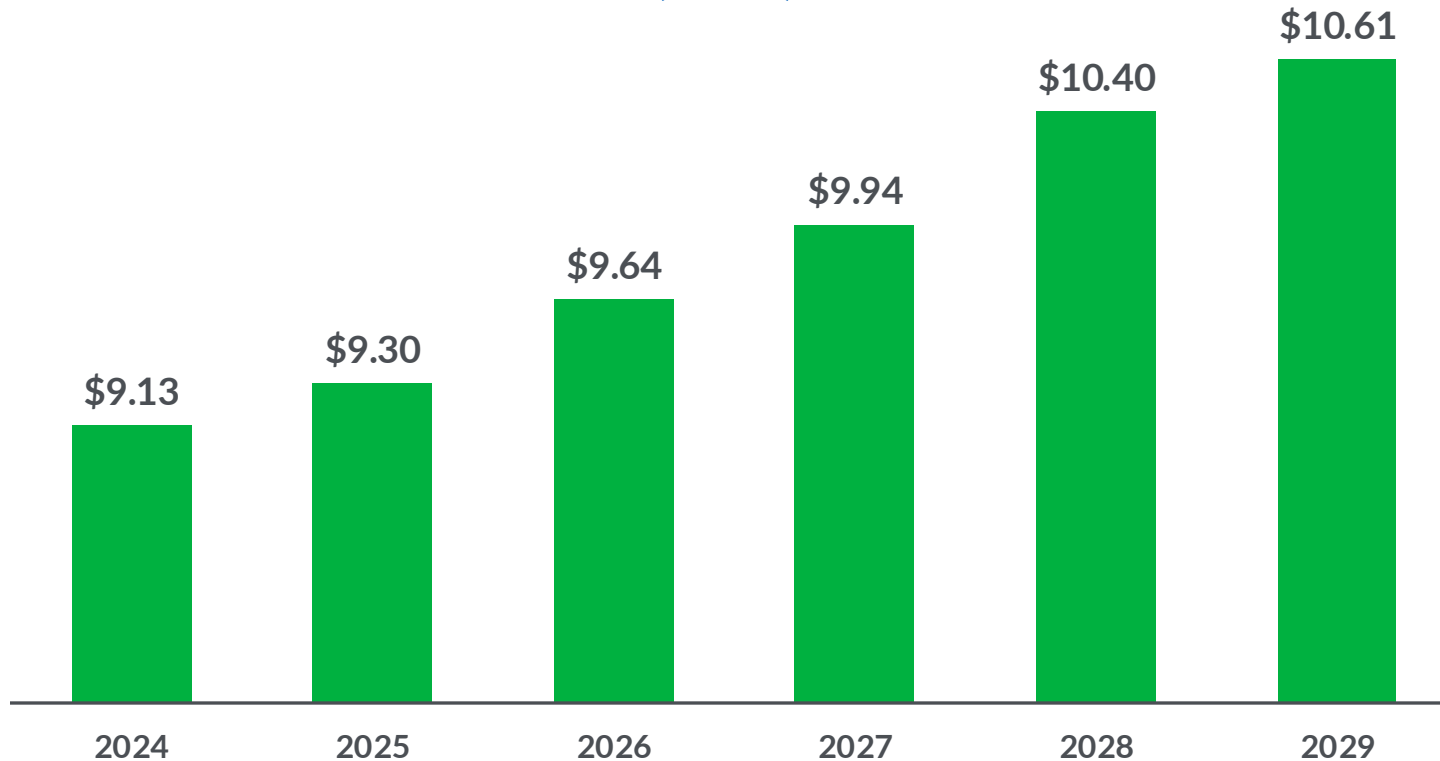
Consumers Want Experiences



Lifestyle and experiential media are on the rise, creating opportunities for brands to build deeper connections and cultural impact

Out of Home Spend Grows Year over Year

US Out-of-Home Ad Spending
(billions)

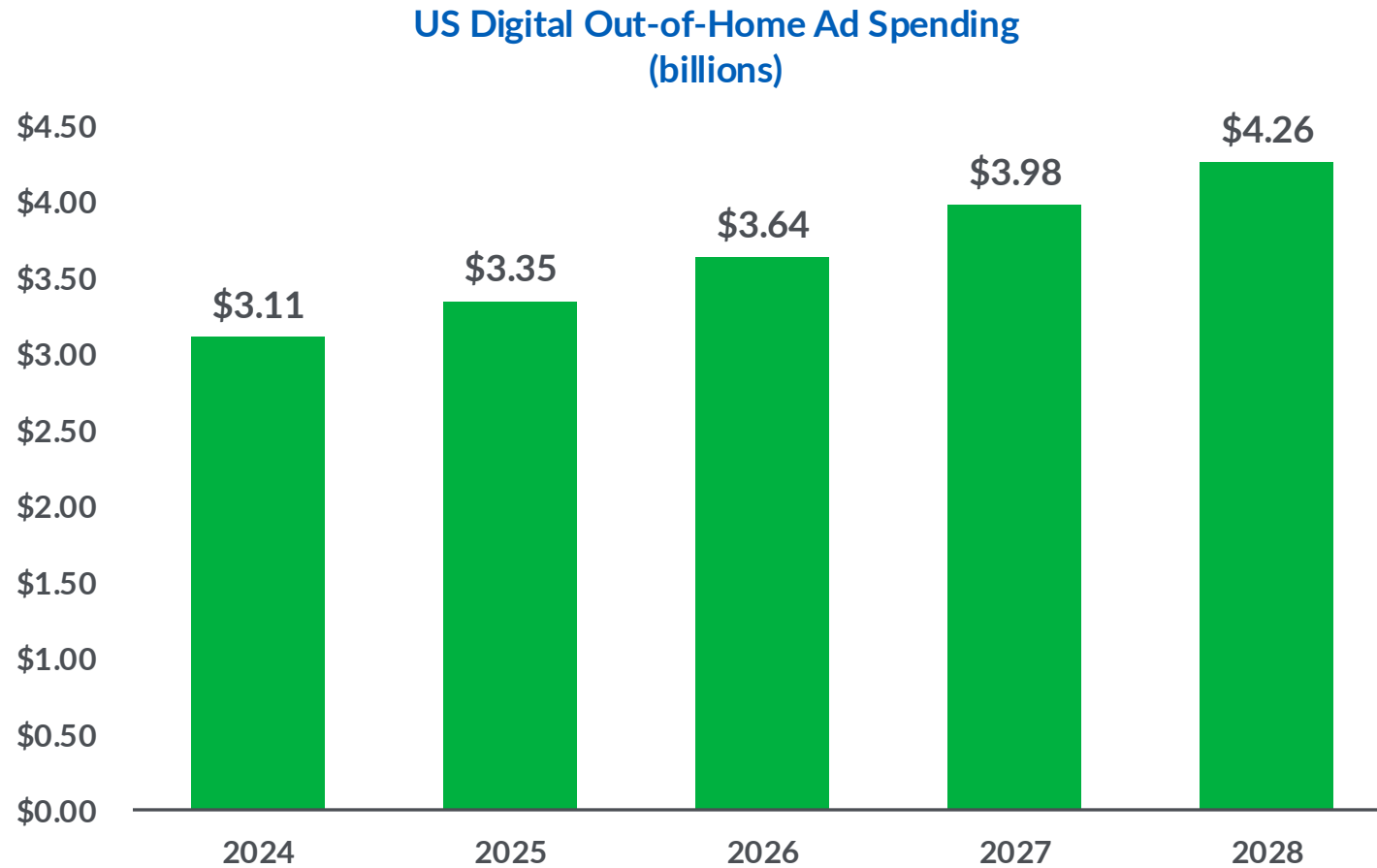


**Includes both traditional and digital OOH; includes alternative, billboards, cinema, street furniture and transit.
eMarketer Forecast, July 2025

In 2025 Out
of Home is
approx.

2.2%
of all ad spend

Digital OOH Growth Continues



eMarketer Forecast, July 2025

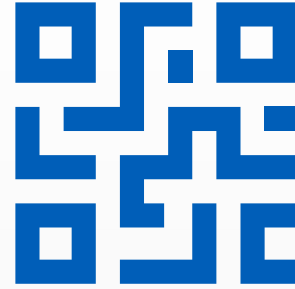
Digital Spend
is projected to
increase

27%
from
2025-2029

Tech-Driven Accuracy in Accountability & Attribution



Location-Based Attribution is becoming the standard



Surge in QR Code Adoption



Evolution connecting physical ad exposure to digital engagement enhances accountability.

Maximizing Measurement in Out of Home Advertising

Data Analyzed



- Mobile Location Data
- Control/exposed group analysis
- Real-time tracking

Measurement Outputs



- Location-Based Exposure Tracking
- Control vs. Exposed Group Analysis
- Real-Time Campaign Measurement
- Cross-Channel Retargeting
- Support for Moving OOH Formats



Creative is Becoming More Dynamic

Countdowns



Day Specific



Live Feeds



Weather

With static to digital conversion up 40% from previous years, Hyper-Personalized executions are both scaled and impactful

- Weather
- Traffic
- Countdowns
- Audience behavior

Lifestyle: Real-World Reconnection



"Live Events will Continue to Amplify Demand"
- OAAA, 2025

Programmatic

Programmatic

AI is Shifting Programmatic Workflows



AI is touching more parts of the campaign, and impacting how creative is produced across channels, so understanding key AI inputs is increasingly valuable for marketers

Consistent Growth Seen Across Prog Channels



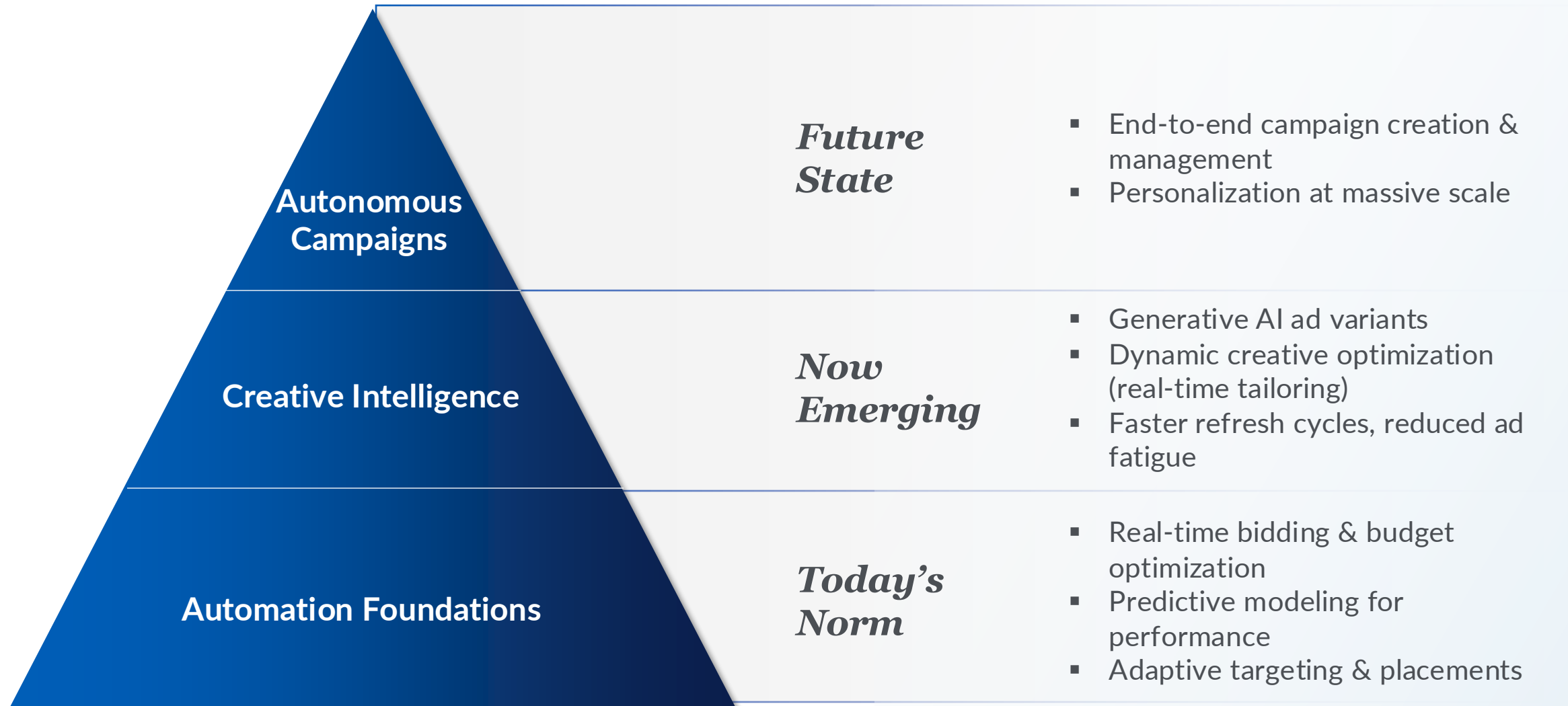
While Display, Video and Retail Media lead the way, growth is being seen in pDOOH and Audio as well, meaning marketers need to consider new interactive and shoppable opportunities when planning media

Contextual Targeting Now Supercharged by AI



Where many Brands had moved away from Contextual targeting, this new era of AI-driven Contextual is forcing marketers to re-think their targeting strategy

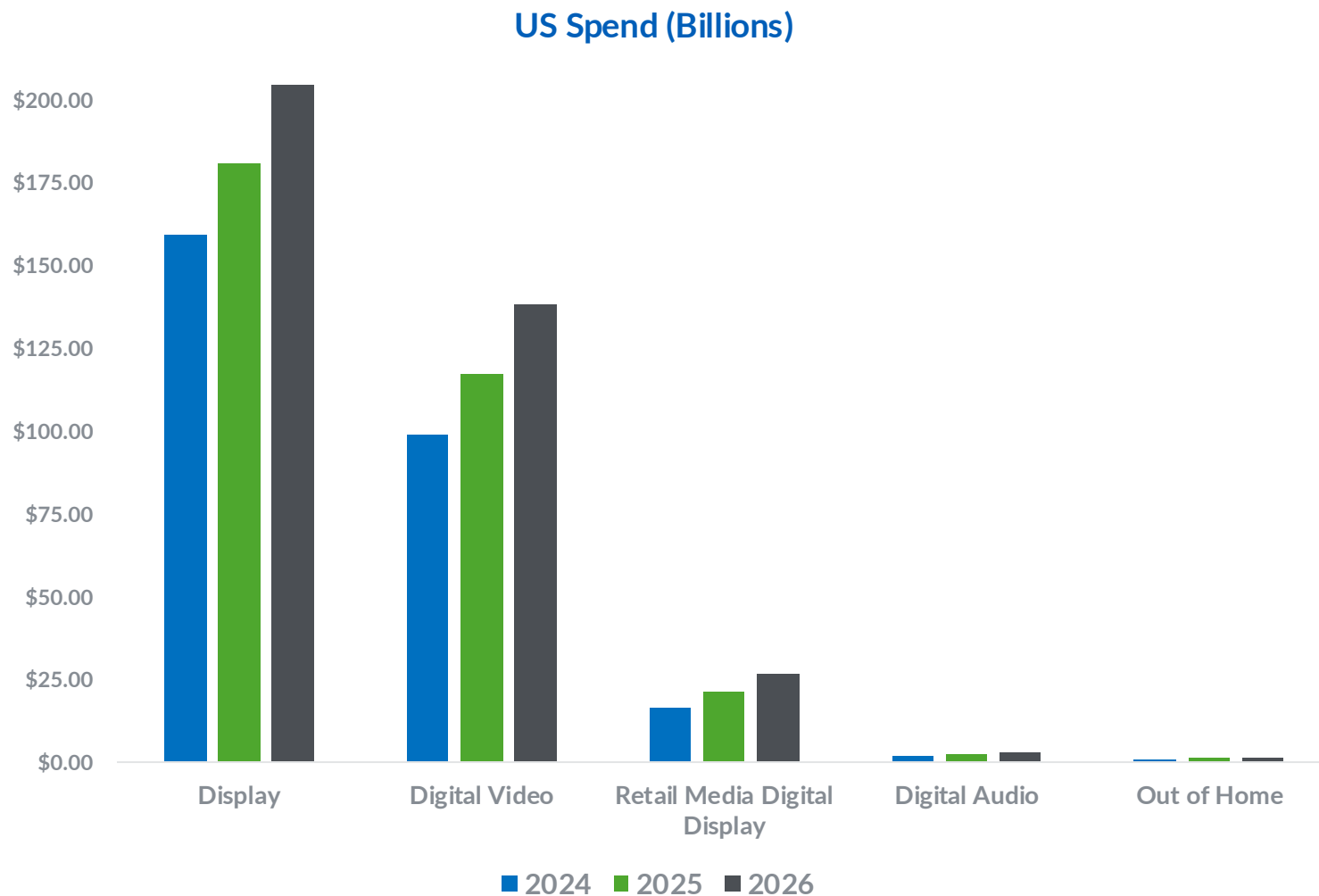
AI is moving from assistive to autonomous



Generative AI tools are being embedded into platforms

Social Display Creative	Google Asset Studio	Generative Ad Copy & Headlines
AI recommendations on creative enhancements which auto-optimize multiple variants to boost performance	Generate high-quality creative assets with the help of Google AI	AI tools integrate with DSPs or creative platforms to generate headline and description variations tailored to different audiences

Programmatic growth spans all channels

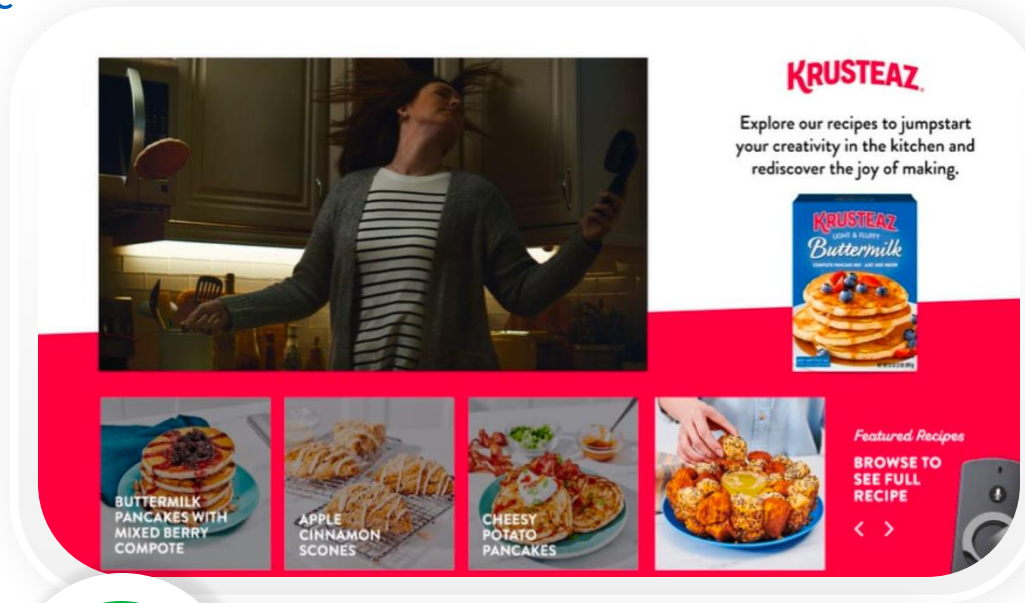


Source: eMarketer Forecast, April 2025

Display & video continue to dominate programmatic spend

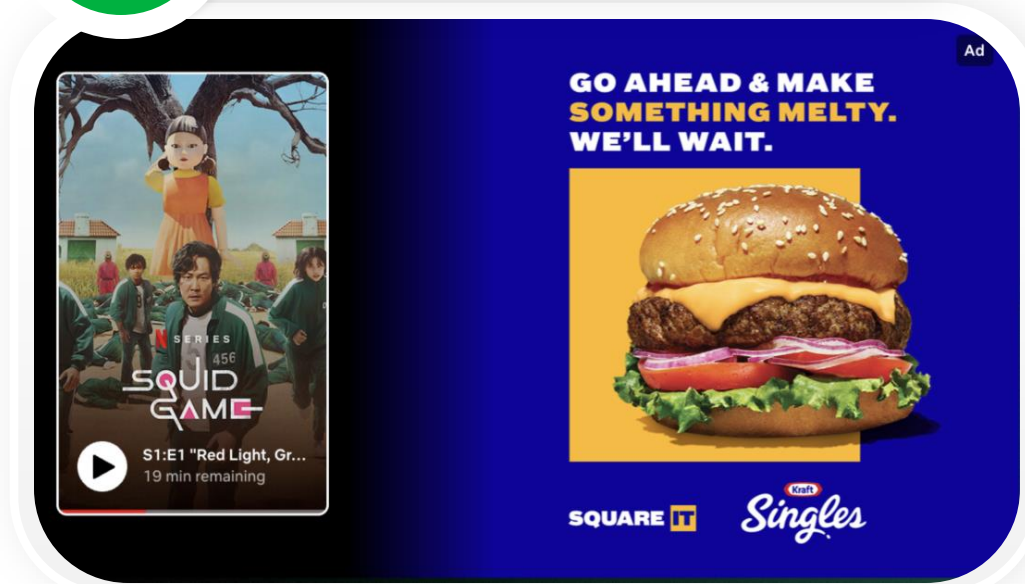
CTV ad spend is expected to reach \$44.5 billion in 2025, while video formats (especially streaming) account for over 40% of overall programmatic spend

Increase in available interactive formats are gaining traction across CTV, Retail, Audio and OOH



90%

of CTV ad dollars in the US are transacted programmatically (eMarketer, 2025)



Channels Now Offer Touchpoints that are Interactive and Shoppable

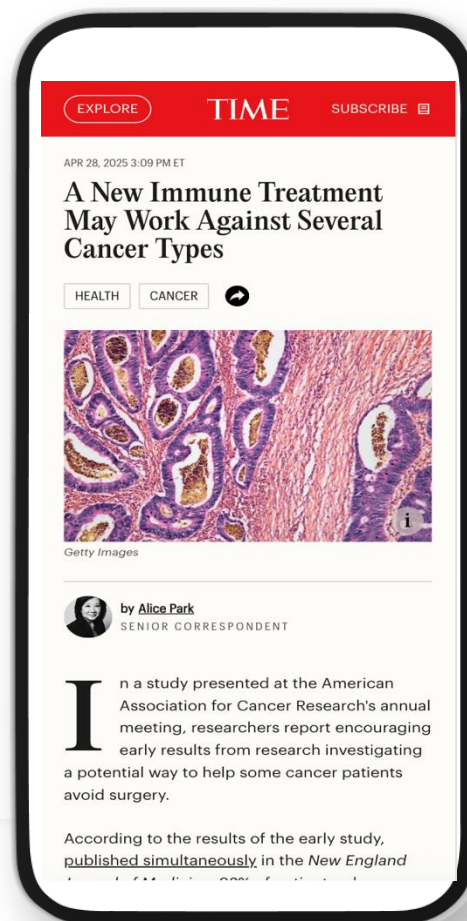
- Shoppable CTV & OTT Ads
- Interactive Video Overlays
- Retail Media Interactivity
- Dynamic Audio & Podcast Ads
- Responsive DOOH Displays

Contextual Resurgence

Modern contextual AI can analyze page content, sentiment and speech data at scale

Serving ads in environments aligned with brand values and audience intent, without personal identifiers.

Integral Ad Science, Suitability Solution, May 2025



Situational

Text

Visuals

Trends

Brand Safety

74%

of Consumers are more likely to remember an ad as the message relates to the content around it**

62%

of Consumers say that they will stop using a brand that appears near low quality content**

OTT Contextual

CTV info tells us..



Friends
Season 4, Episode 24



Location



Network



Show & Genre

Web info tells us...

#ARTICLES:
4,987

READS:
19.2M



AI tells us...

Friends S4 EP 24 The One With Ross's Wedding, Part 2

Related Themes

Fashion

Wedding

Life Events

**OPPORTUNITY:
CELEBRATORS**



Final Thoughts

2026

Embrace crossover, innovation, and holistic strategies to thrive in a rapidly evolving ecosystem

Q&A

Want a copy of this presentation?

MediaTrends@harmelin.com

Thank you

*Join us in early 2026 for Harmelin Media's
Annual Macro Industry Forecast & Trends!*

Appendix

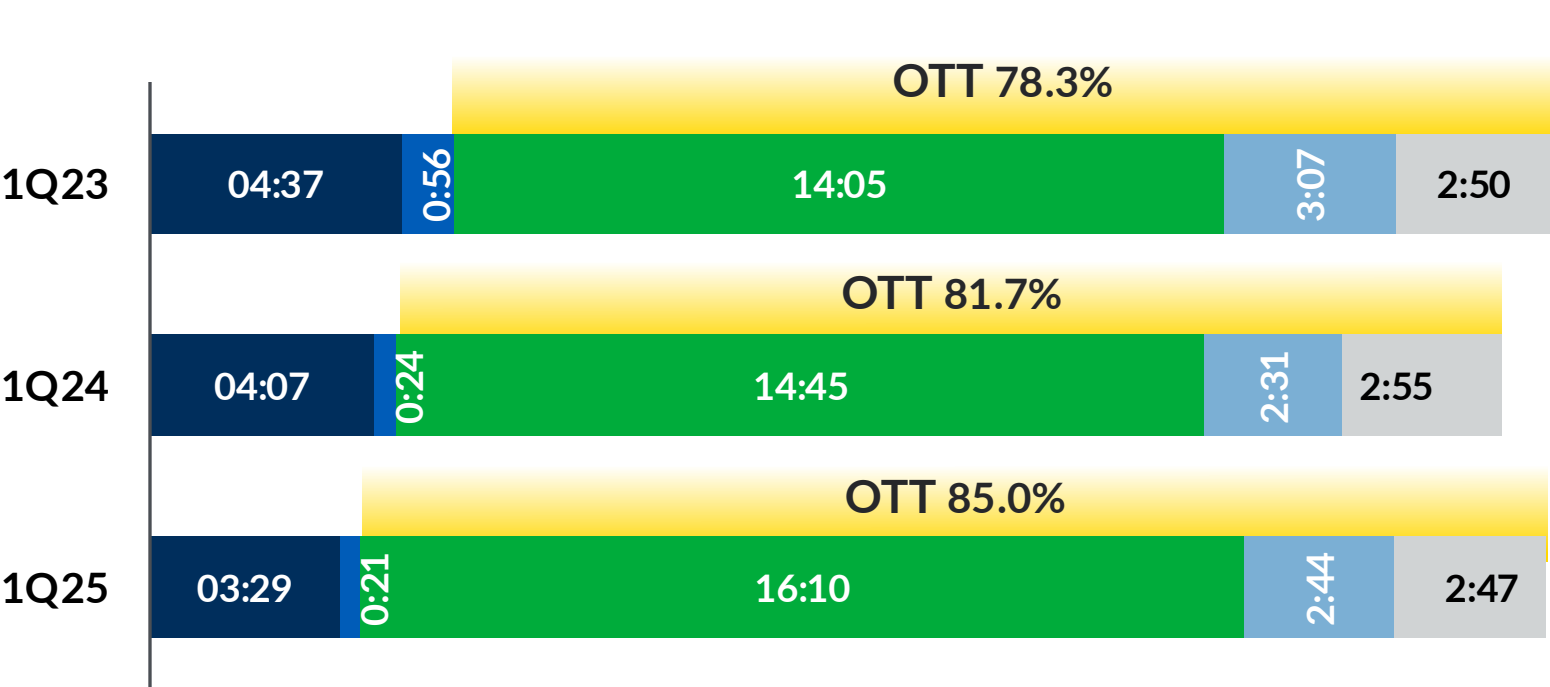
Additional Channel Support

Video

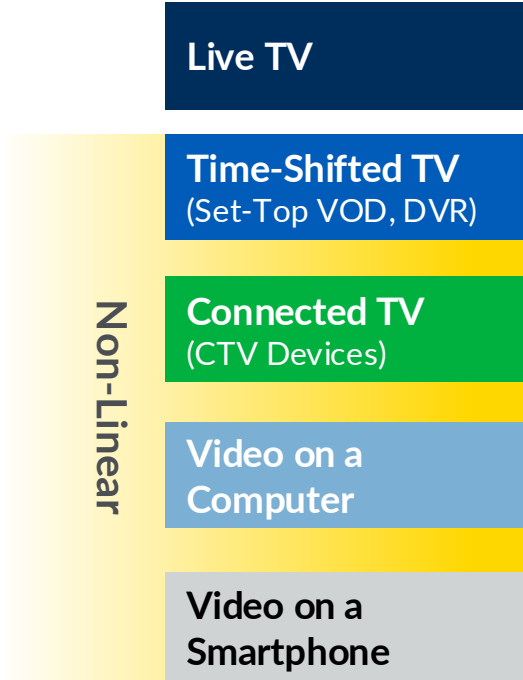
Streaming Most Prevalent with Younger Audiences

...for whom 85% of ALL viewing is now via OTT platforms

A18-34 Time Spent with Video Platforms (weekly hours)



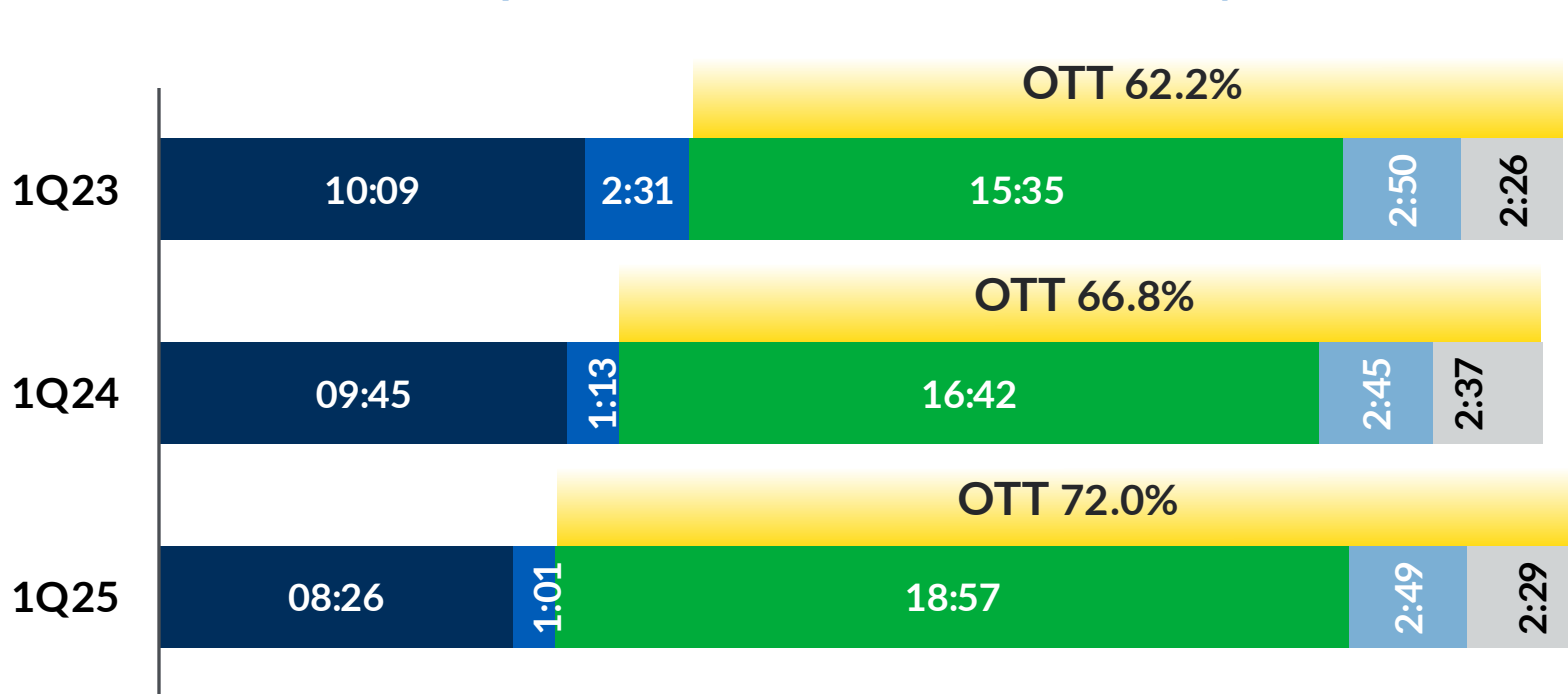
Note: Video on a Computer includes some content not universally defined as OTT programming



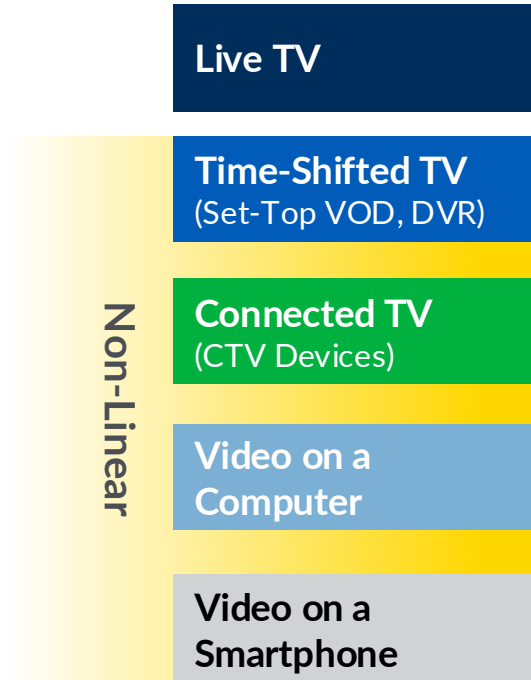
OTT Growth Continues to Drive Shifts in Viewing

Nearly three-quarter of ALL A25-54 TV viewing now done via CTV devices

A25-54 Time Spent with Video Platforms (weekly hours)



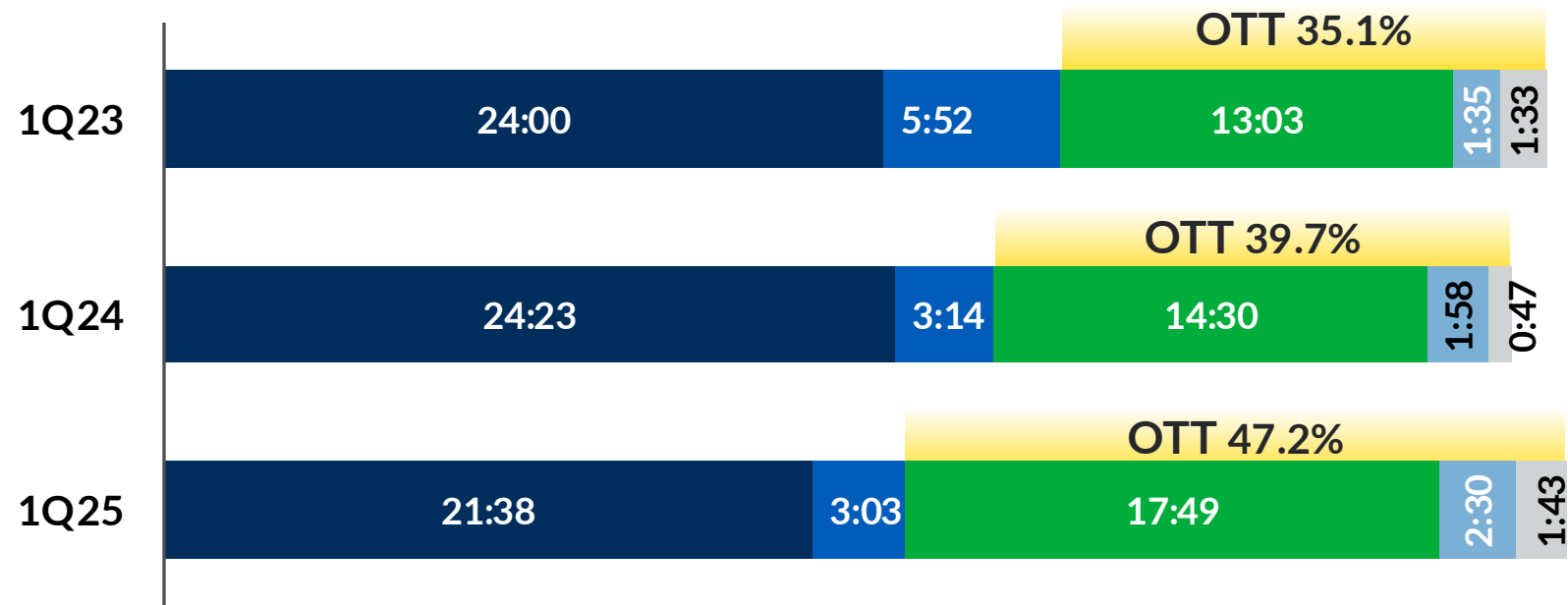
Note: Video on a Computer includes some content not universally defined as OTT programming



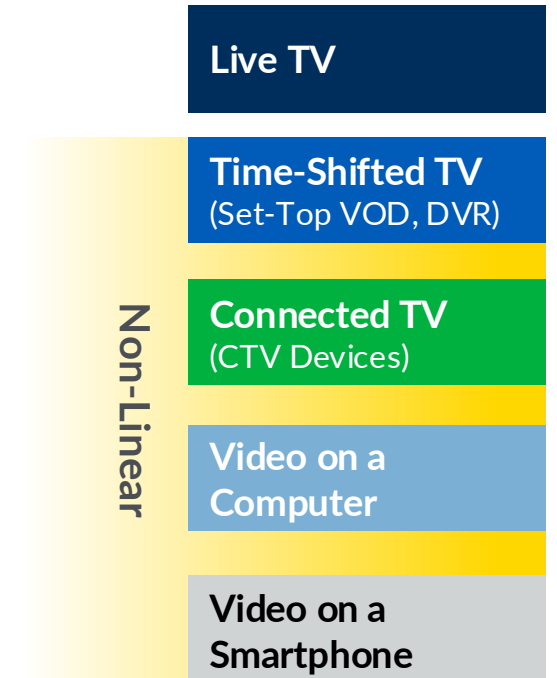
TV Viewing Shifts Among Older Adults 50-64

OTT/CTV viewing now accounting for nearly 50% of time spent with video content

A50-64 Time Spent with Video Platforms (weekly hours)



Note: Video on a Computer includes some content not universally defined as OTT programming



Sports ...Where to watch



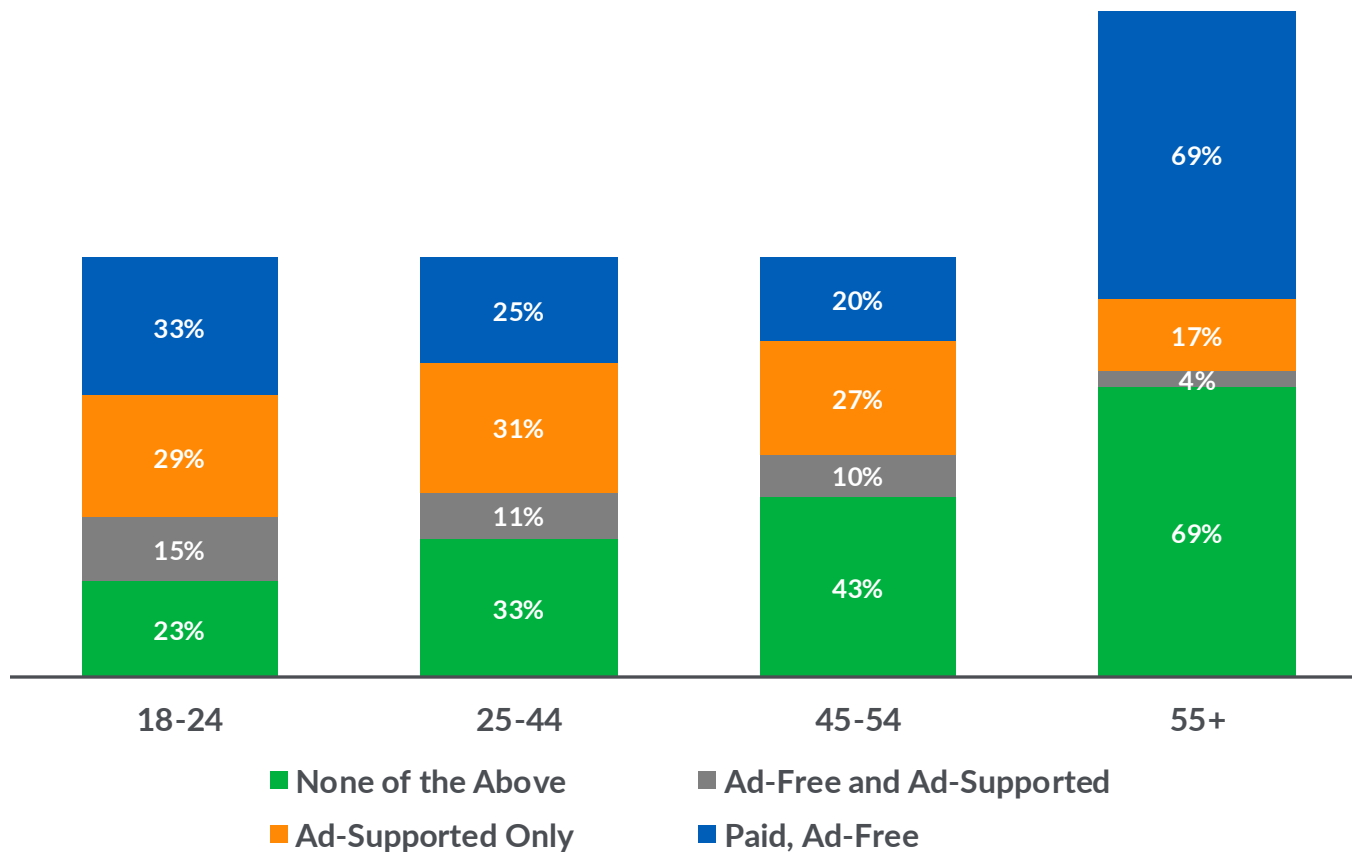
STREAMING								
NFL	NBA	MLB	NHL	MLS (SOCCER)	NCAA FOOTBALL/ BASKETBALL	UFC	TENNIS	GOLF
PARAMOUNT+	PEACOCK	APPLE TV+	ESPN+	APPLE TV+	PEACOCK	PARAMOUNT+	ESPN+	PEACOCK
NFL+	AMAZON	ROKU CHANNEL			ESPN+		PEACOCK	ESPN+
ESPN+		MLB.TV			PARAMOUNT+			
PEACOCK		YOUTUBE						
AMAZON								
YOUTUBE - SUNDAY TICKET								
NETFLIX								
FUBO								
LINEAR								
FOX	ABC	TBS	TNT	TELEMUNDO	ABC	CBS	ABC	CBS
ESPN	ESPN	FOX	ESPN	UNIVISION	ESPN	ESPN	ESPN	ESPN
CBS	NBA TV	ESPN		FOX	FOX		TENNIS CHANNEL	NBC
NFL NETWORK	NBA LEAGUE PASS	MLB NETWORK			NBC		NBC	GOLF CHANNEL
NBC	NBC				CBS			
TELEMUNDO	ION (WNBA)				TNT Sports			
	CBS (WNBA)				CONFERENCE NETWORK (VARIOUS)			



Audio

Digital Audio- Who is Listening?

Q: "Which of the following types of digital audio streaming services do you use?"



Sources: eMarketer: Digital Audio Listener Demographics 2025

1/3 of Adults 18-24 are using ad-free, paid audio services, with a little less using ad-supported

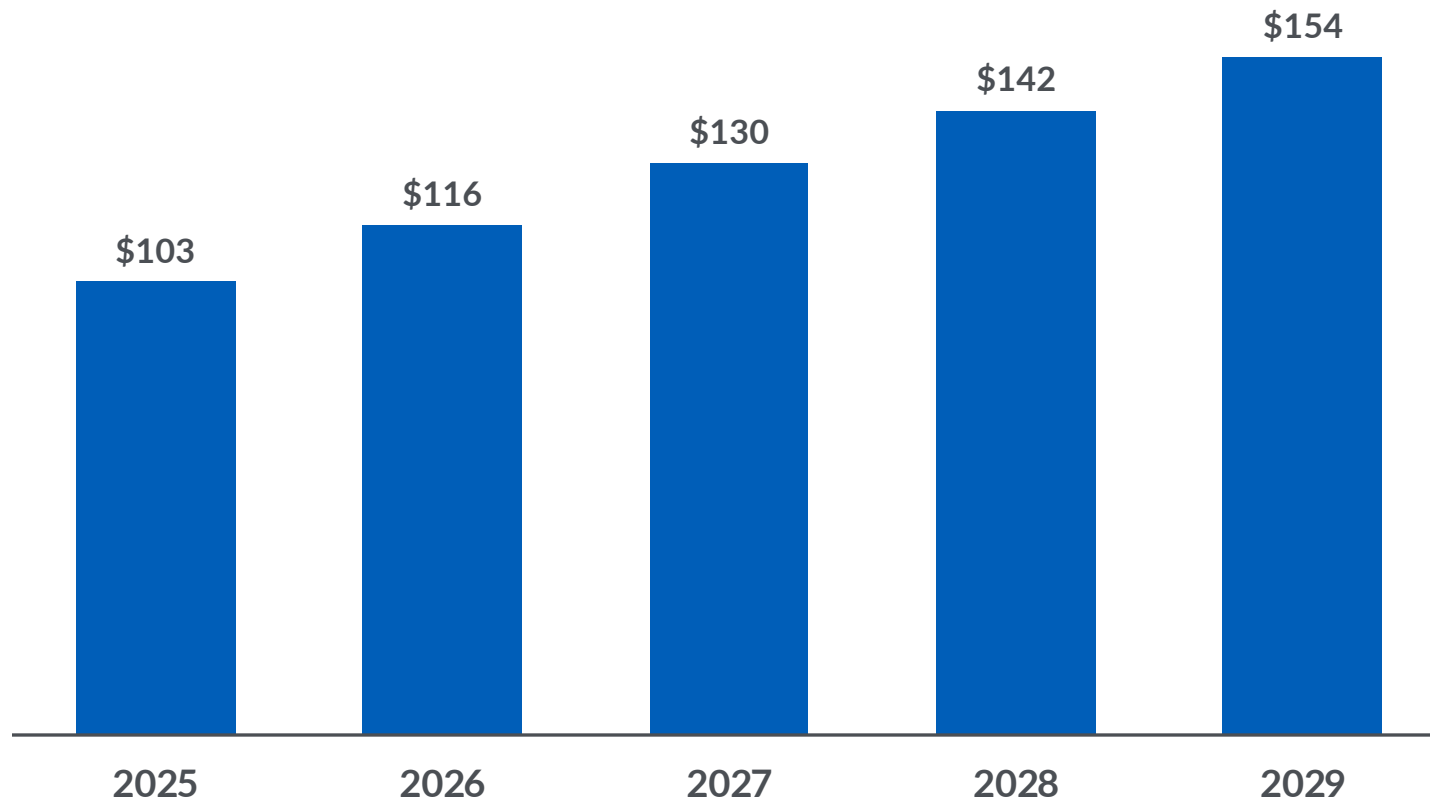
Adults 55+ are more disengaged from digital streaming, with 69% say they use none of the listed services, showing a significant generational gap in adoption

Ad-supported only streaming is relatively consistent across younger and middle-aged groups suggesting that cost-conscious convenience has cross-generational appeal.

Social

Social Media Spend Forecast

Social Network Ad Spending (billions)



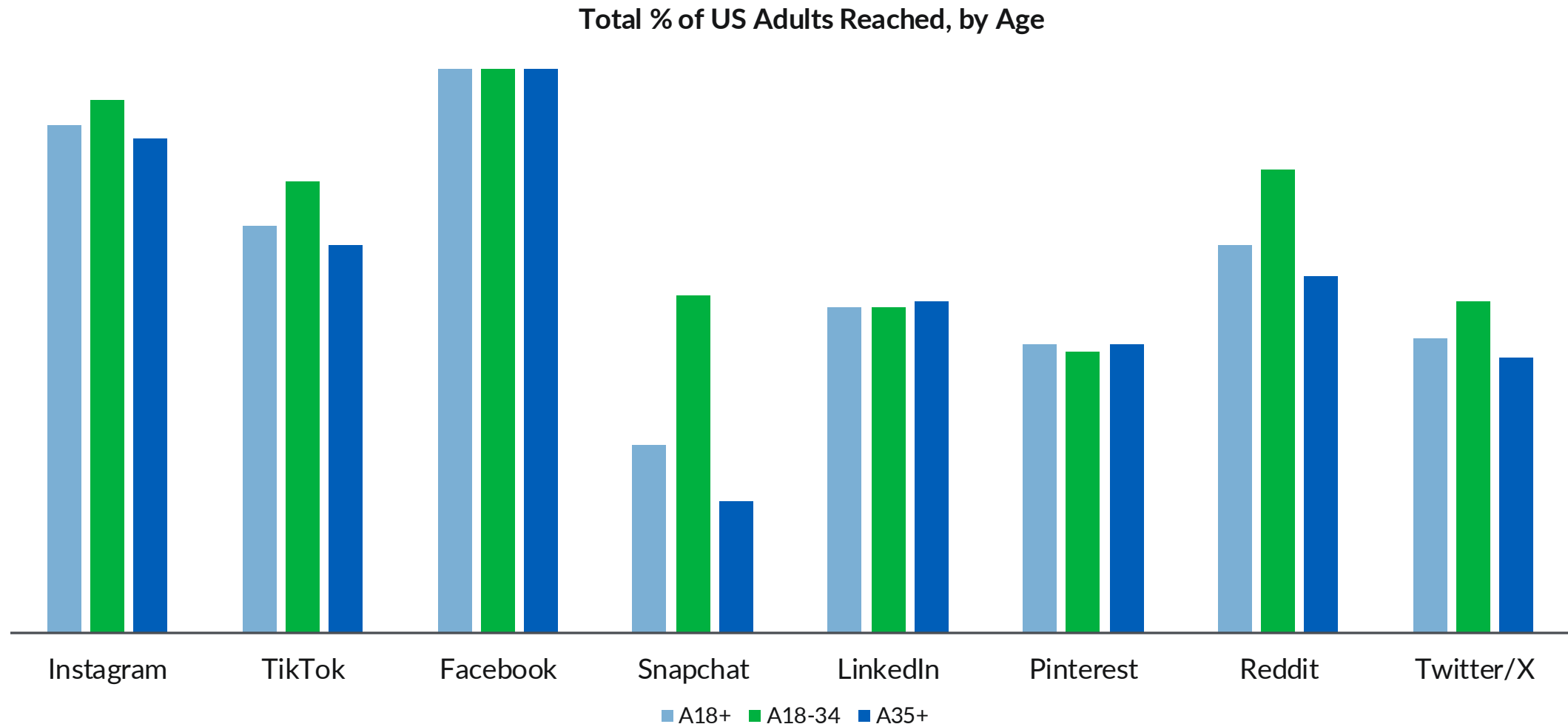
Sources: eMarketer: US Social Ad Spending VS Time Spent 2025

Social spend continues to grow, but at a slowing pace, signaling the channel's normalization.

- +13% growth from 2025 to 2026
- Drops to just +9% from 2028 to 2029

Despite the plateauing growth rate, social media remains a dominant channel in the digital ad ecosystem, demanding ongoing investment.

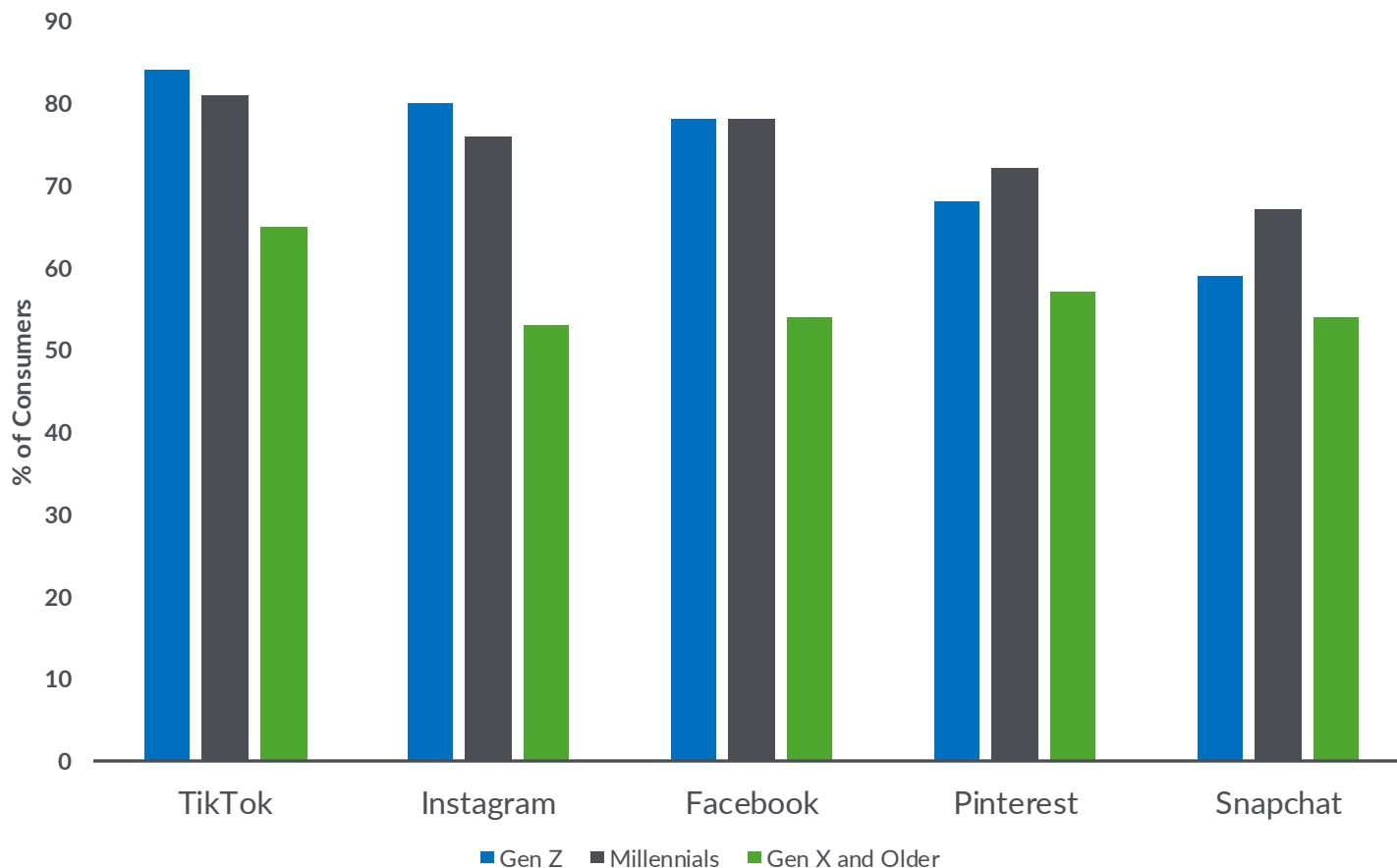
Facebook & Instagram maintain highest reach across age groups



Source: The Nielsen Company 2025

Social Search & Shopping

US Platforms Shopped by Generation



Source: <https://clients.mintel.com/content/report/social-commerce-us-2025>

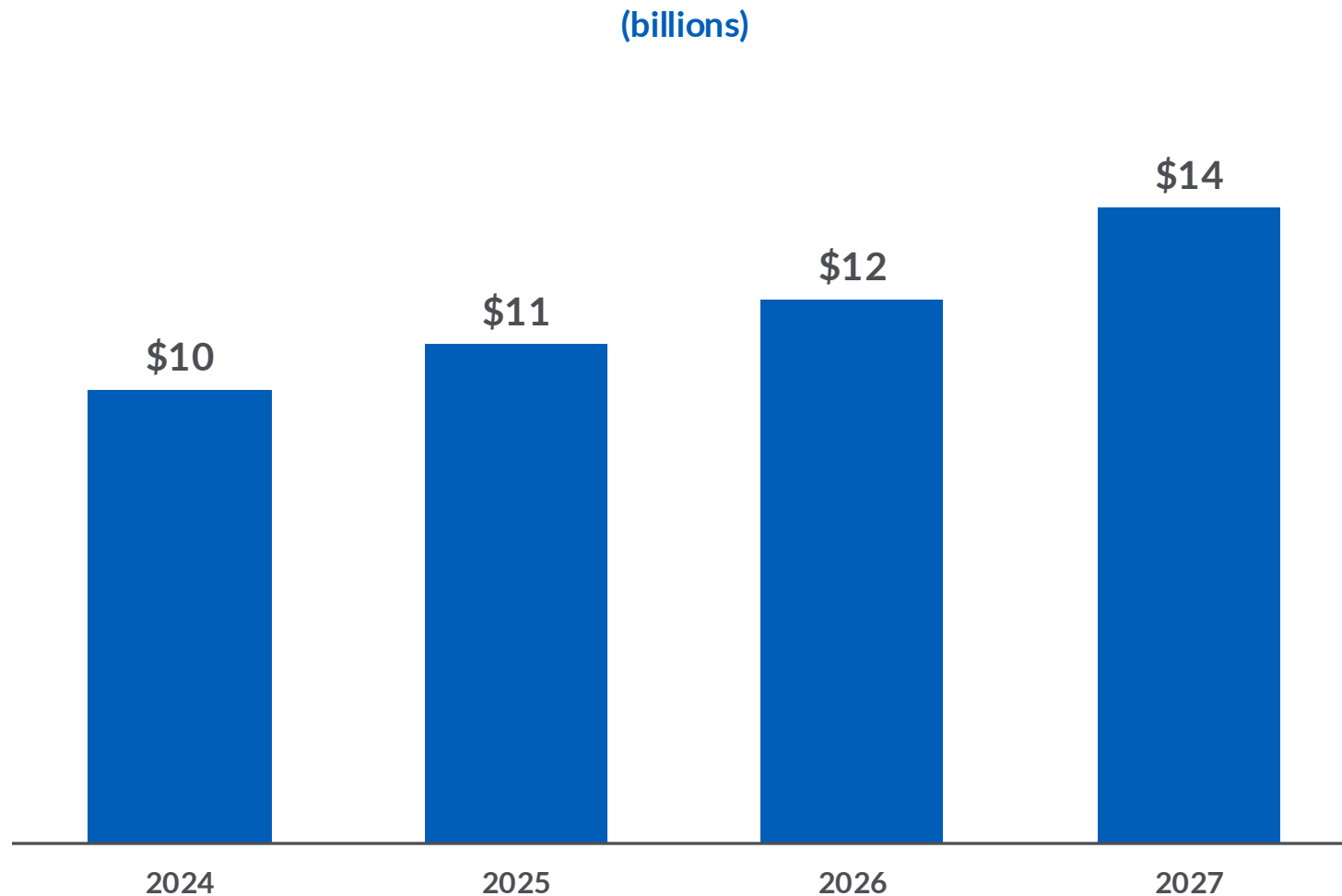
51% of consumers have made a purchase on social media and 21% have not but would be open to doing so

62% of consumers find that discovering new products/brands is a benefit of using social media

54% of consumers are more likely to make a planned purchase on social media

Influencer & Affiliate

Influencer Marketing Spend



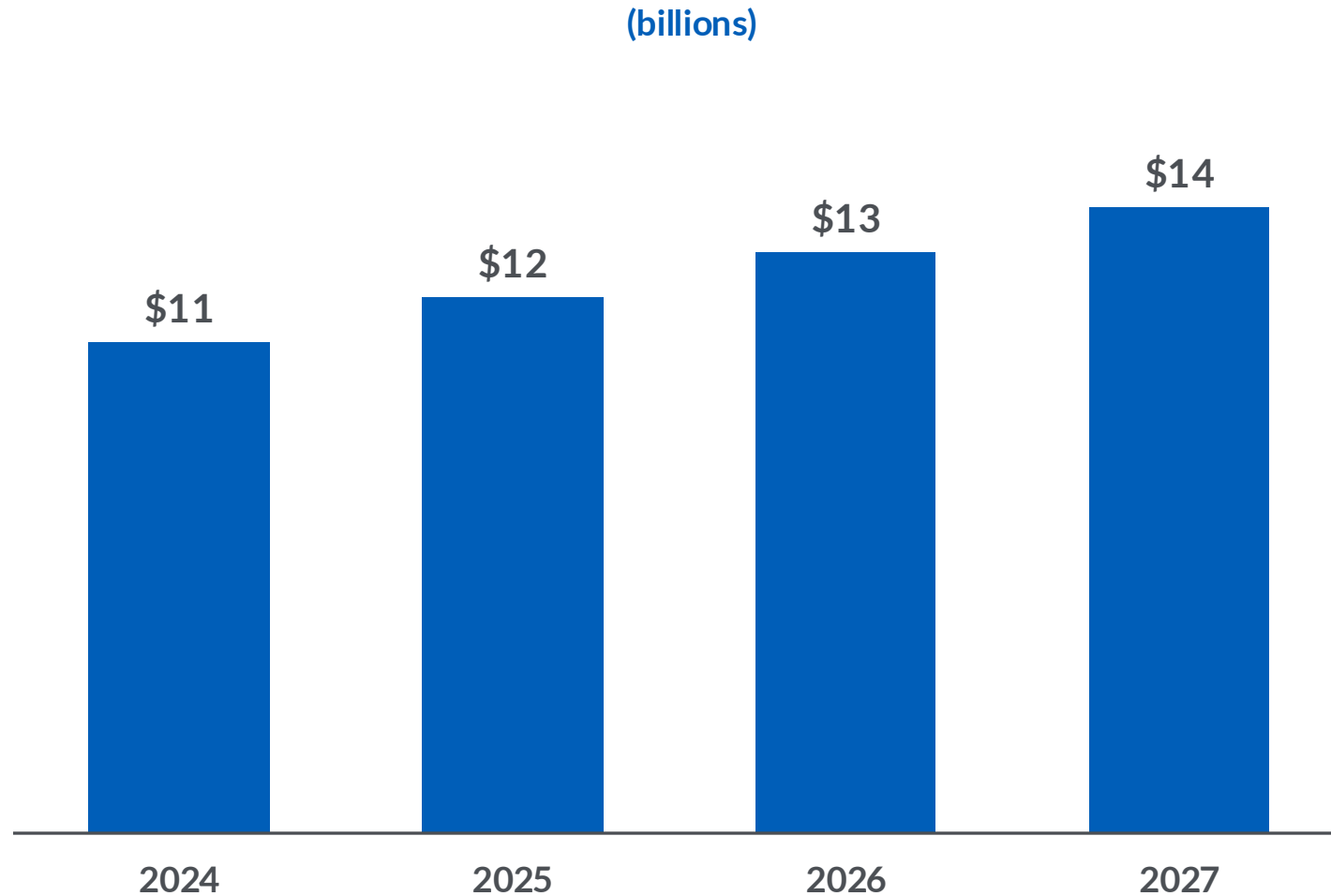
Sources: Influencer Marketing Measurement 2025, Influencer marketing set to surpass \$13 billion by 2027

In 2025, Influencer spend in the U.S. will hit 11 billion, seeing a 9% growth in spend from 2025 to 2026.

No longer just a campaign tactic, it's becoming part of the always-on brand strategy.

37% of C-Suite execs cite "measuring ROI more effectively" on their influencer priorities, followed by

Affiliate Marketing Spend



Sources: Influencer Marketing Measurement 2025, Influencer Gains Momentum as Trust Turns to Creators

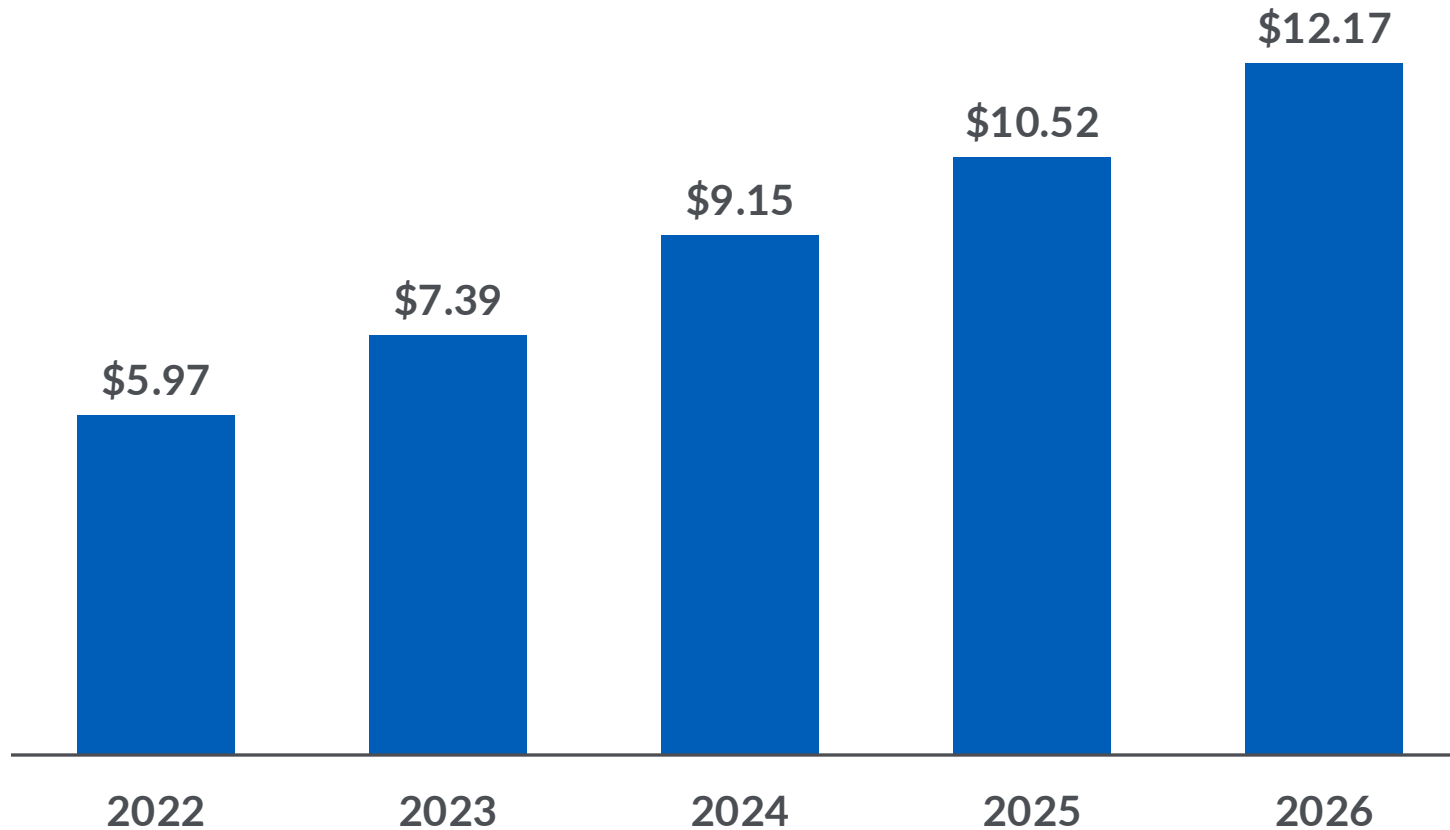
Affiliate will see an 8% increase in spend between 2025 and 2026

Relative to other ad types, consumers don't mind encountering affiliate ads while using the internet, with 11% of consumers fully trusting the ads, and another 48% citing "sometimes" trusting the ads.

Affiliate finds the most success in enhancing customer loyalty, generating leads, and brand awareness

US Sponsored Content will Soar Past \$10 Billion in 2025

US Creator Revenues (billions)



Sources: eMarketer: US Social Ad Spending VS Time Spent 2025

In 2024 alone, 64% of brands allocated half of their budget towards paid media amplification.

66% of brands use influencers to drive brand awareness, followed by:

- audience engagement (59%)
- building trust and credibility (55%)
- driving revenue growth (55%)

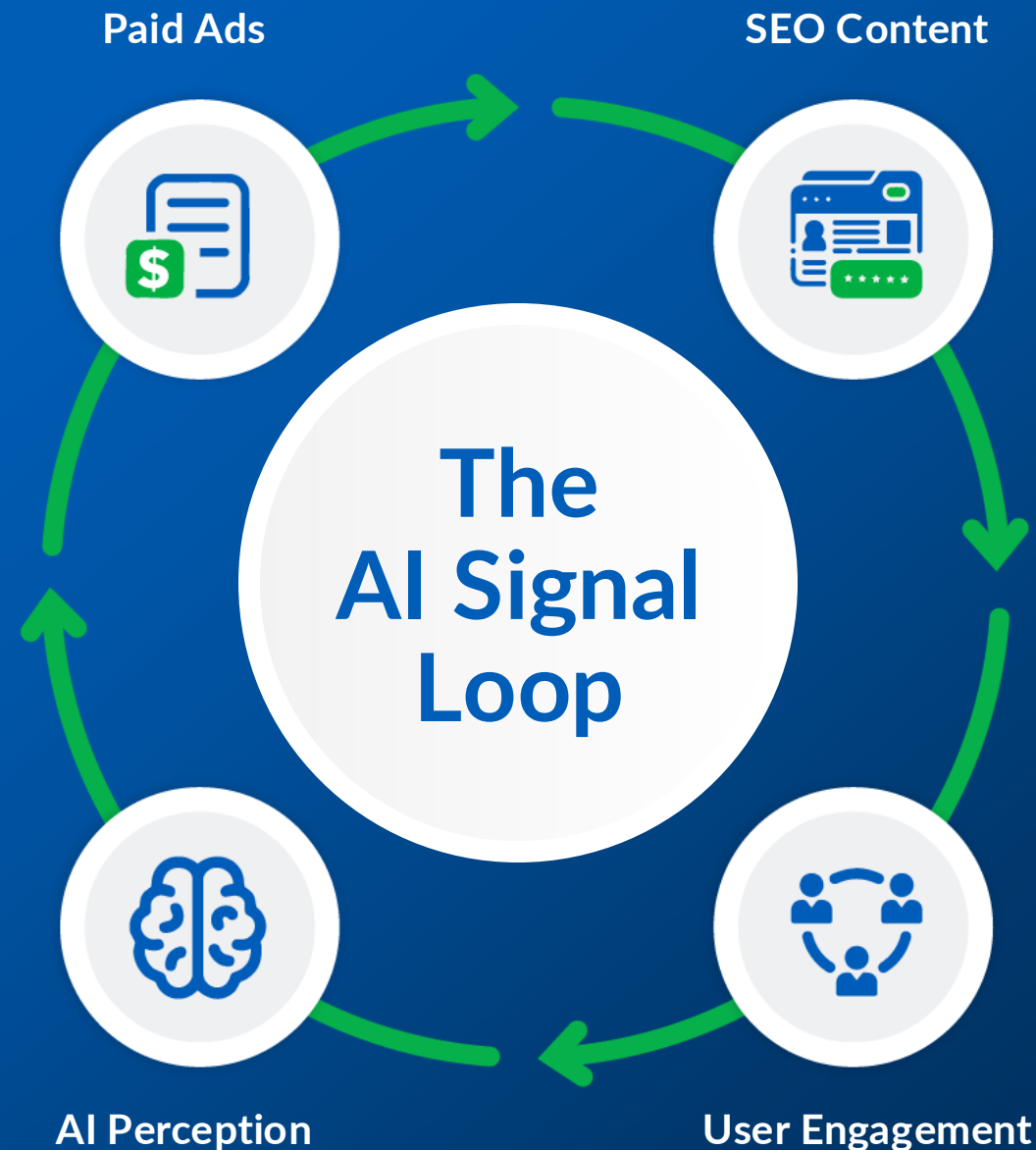
67% of consumers trust influencer-led ads compared to traditional ones

Search

Key Signals

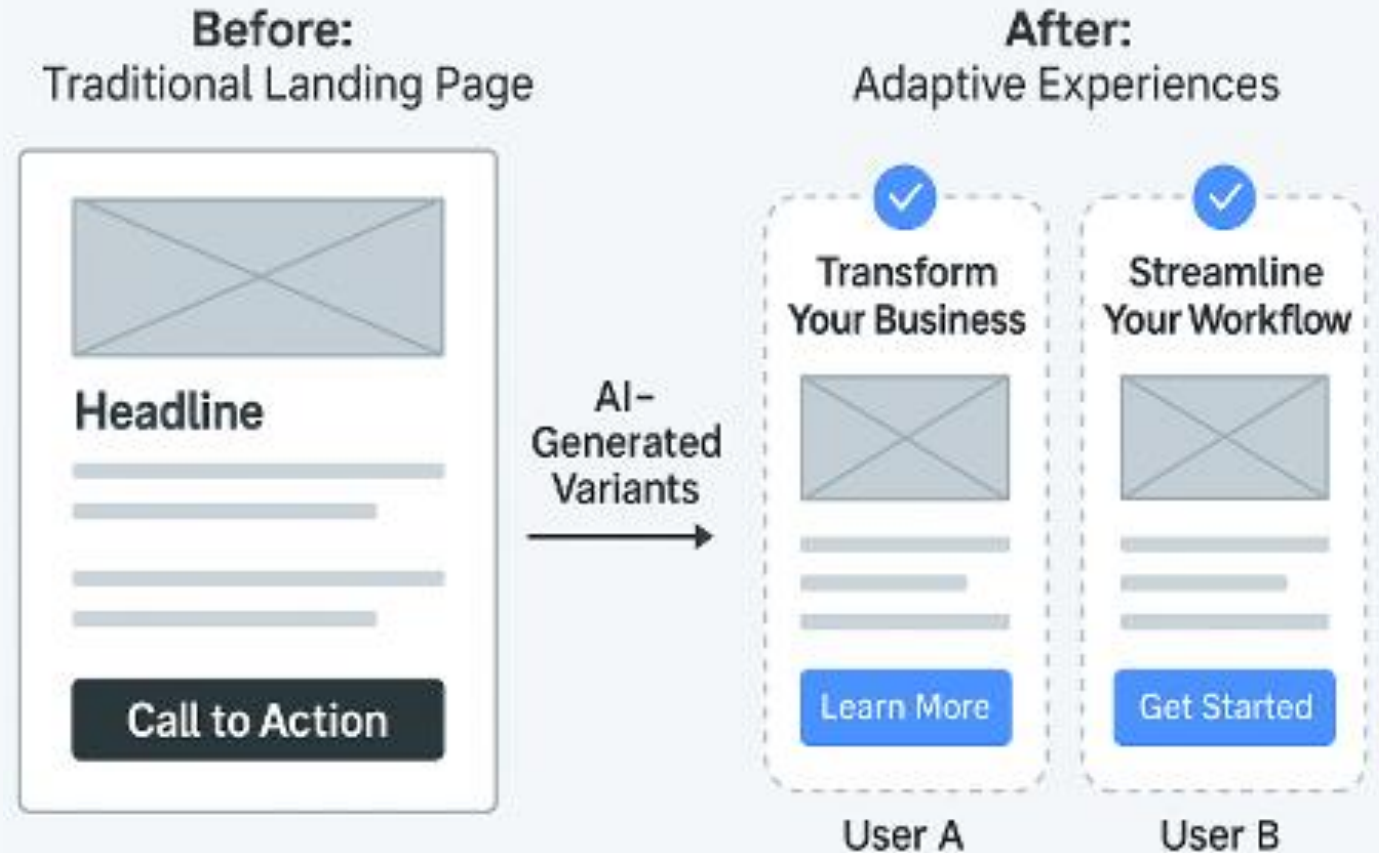
How Paid and Organic Content Shape AI Outputs

- **Ad performance as model feedback:** High-CTR ads, consistent brand messaging, and user engagement metrics signal brand relevance to AI systems and feed model fine-tuning.
- **SEO content = training data:** FAQ pages, authoritative articles, and structured markup all improve your chances of being cited in AI-generated answers from Gemini, Perplexity, or ChatGPT.
- **Brand authority is algorithmic:** Mentions across reviews, forums, and third-party sites reinforce your identity to models as a credible solution source.
- **Semantic consistency matters:** Unified messaging across paid and organic helps reinforce key brand associations for AI — like who you serve and what you solve.



AI Landing Pages – From Static Pages to Adaptive Experiences

Landing pages are no longer static design assets — they're dynamic, AI-powered performance engines built to adapt, test, and evolve in real time.



Key Capabilities of AI-Driven Landing Pages



At-Scale Generation

Use generative AI to instantly create dozens of page variants with different headlines, CTAs, layouts, and messaging — based on campaign, audience, or product focus.



Adaptive Personalization

Pages dynamically change based on who's visiting — adjusting for user behavior, demographics, traffic source, and funnel stage.



Self Optimizing UX

Design elements (forms, hero sections, button copy) are tested and refined automatically through machine learning based on conversion signals.

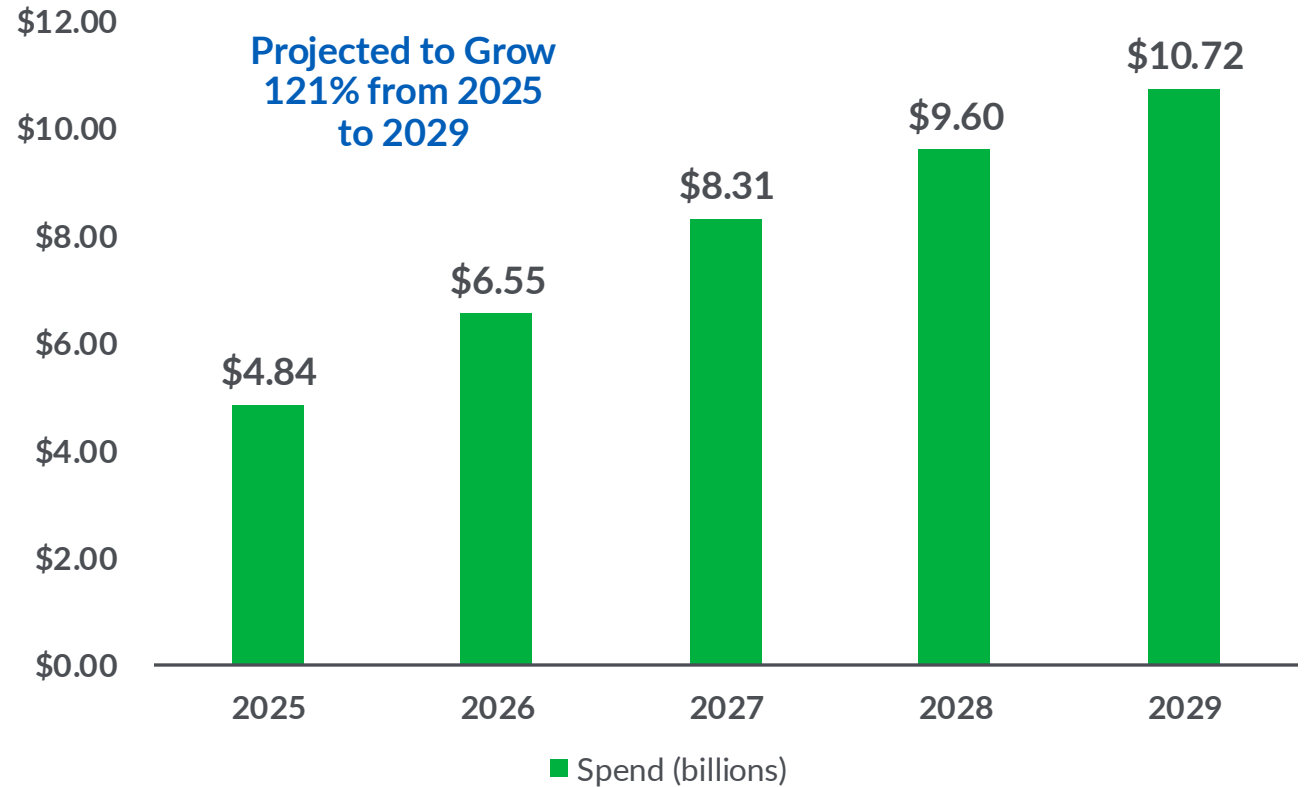
Retail Media

The Rise of Retail Video

In 2025 Retail Media Video Spend accounts for:

- CTV ad spending:
14.50%
- Retail media ad spending:
8.20%
- Digital ad spending:
1.40%

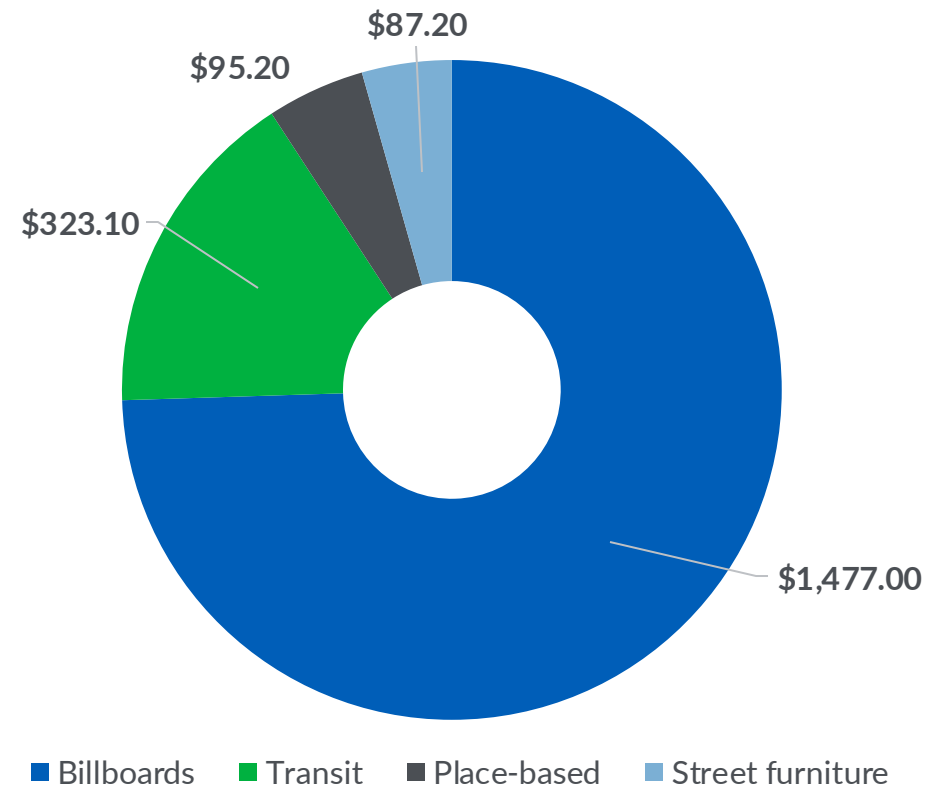
US Retail Media Connected TV Ad Spending



Out of Home

75%
of Out of Home
Spend is allocated
to Billboards

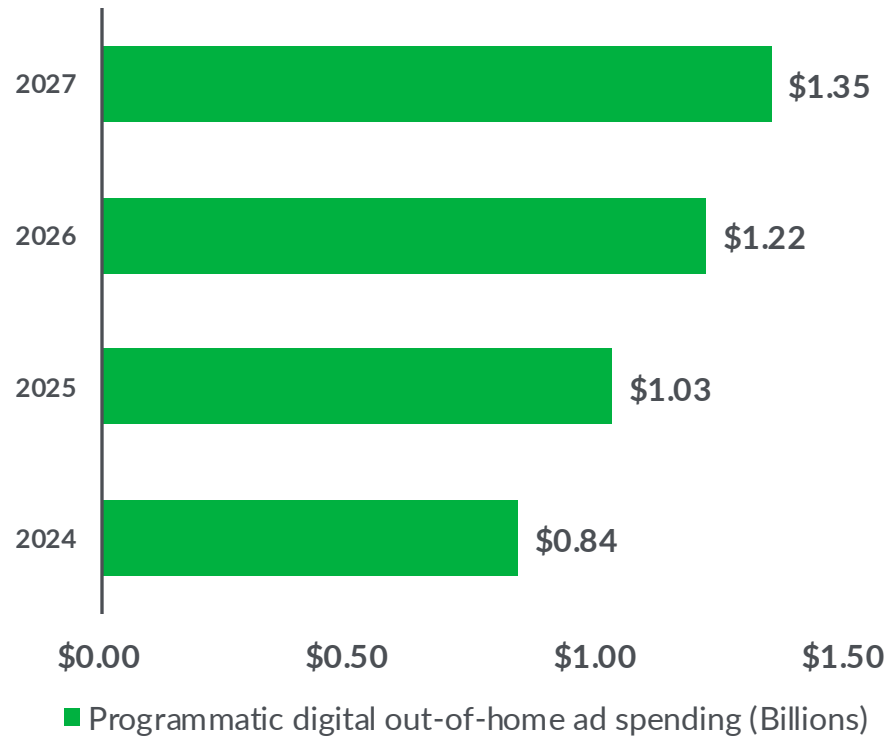
US Out-of-Home (OOH) Ad Spending, by Format, Q1 2025 (millions)



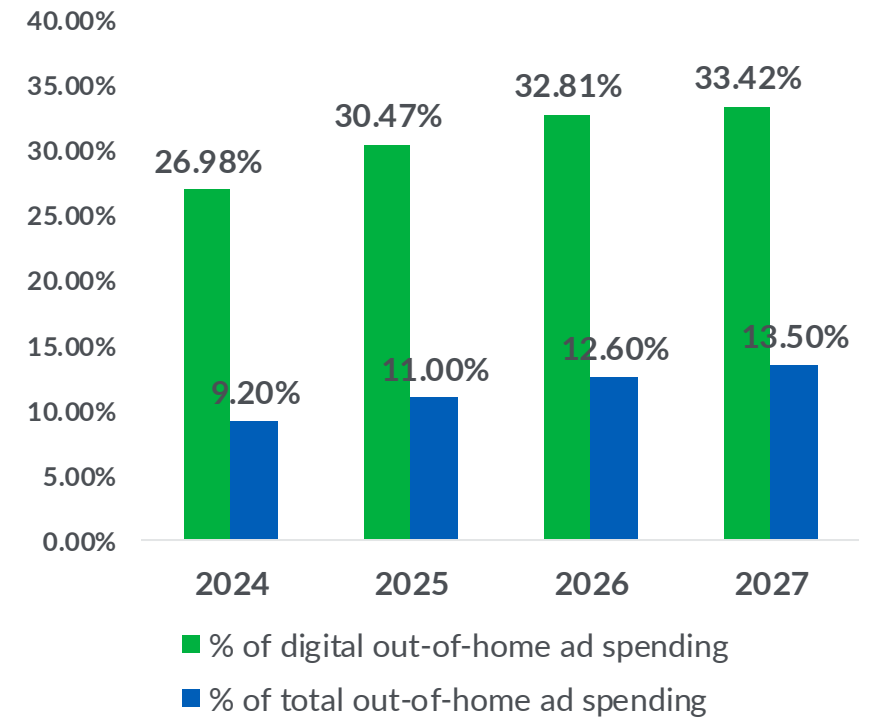
Out of Home Advertising of America (OAAA), June 2025

Programmatic Out Of Home Grows

US Programmatic Digital Out-of-Home Ad Spending

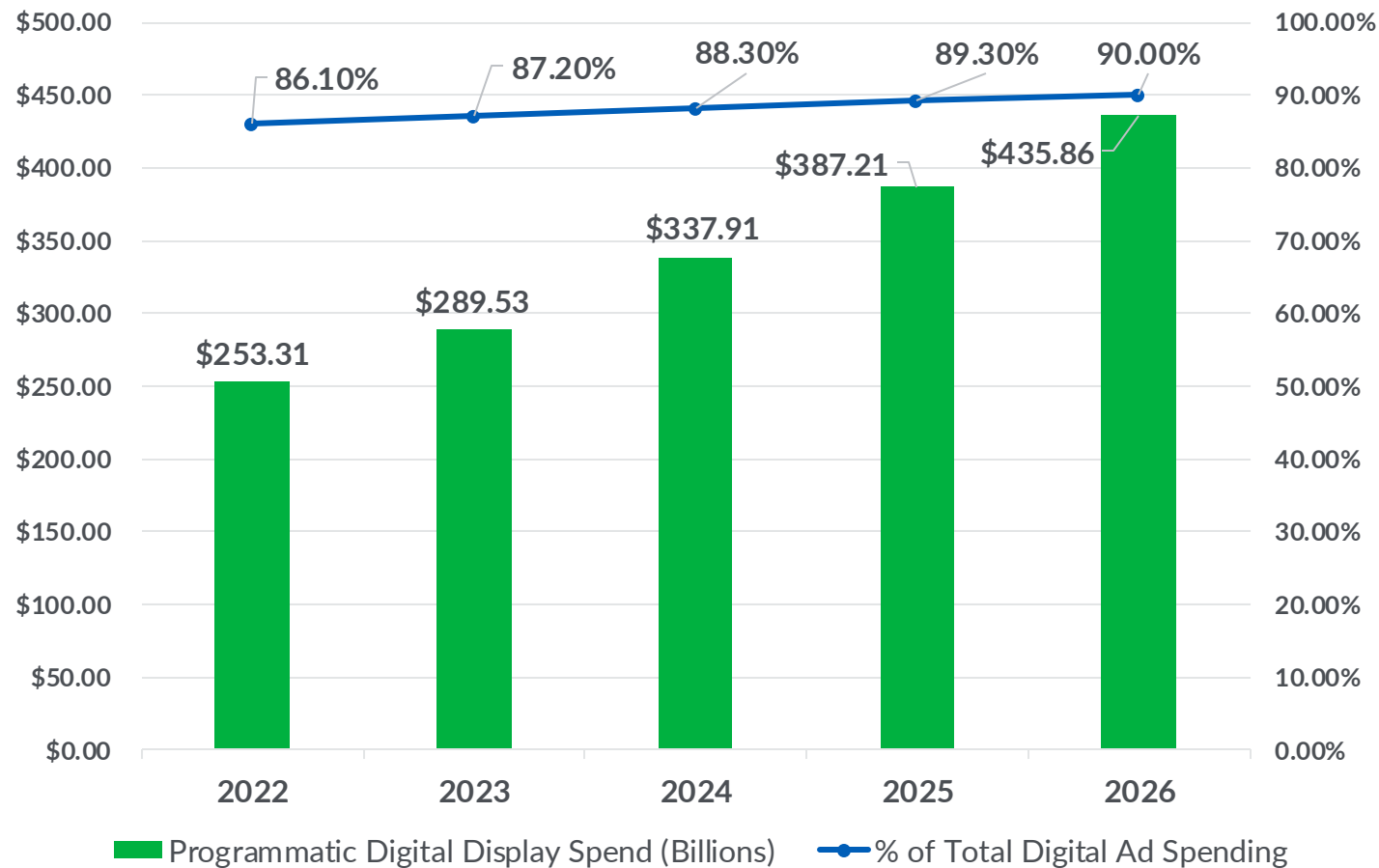


US Programmatic Digital Out-of-Home Ad Spending



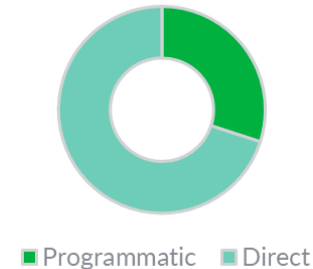
*Pro*grammatic

Programmatic Dominates Display & Video Spend but Opportunities Exist on Other Channels

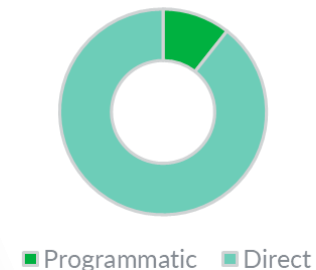


eMarketer Forecast, July 2025

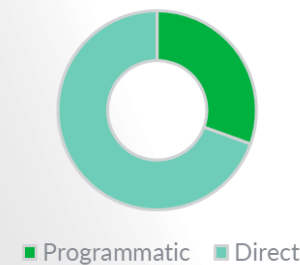
Digital Audio



Podcast



Digital Out of Home



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.

