

MIND

Trends

2024

SHARE

Ten years of Mindshare's Trends

If the last decade was characterised by tech bros wanting to 'move fast and break things', it's becoming clear that we now need to fix things



Up Close, Not Personal | Messy Media | Generative AI | Significant Strangers | Real or Replica?

Introduction

This year, it's our tenth anniversary of writing our trends reports. A lot has happened during this time, so we wanted to look back and dig a bit deeper. As a result, we've added a whole upfront section on this before we look ahead to 2024.

It feels right to take stock, as our feature trends have a very different flavour to years past. Many of our previous trends have focused on the evolution of tech, but also media channels. Last year it was video, social media and retail media for example. These are absolutely the right things to be monitoring and we will continue to check in on these, every year. However, this year, something felt different.

Today, the intersection of media, advertising and technology presents profound questions for our audiences, and for ourselves. Our five feature trends in 2024 cover AI, fake content, the maturation of UGC, the blurriness of media and the shifting expectations around personalisation and identity. This stuff leaves audiences wondering: is

this real? Who can I trust? As media experts, we find ourselves asking, how will generative AI affect our industry? What happens when interfaces change? How should we be using people's data? At times like this, tracking the incremental evolution of individual media channels or technologies can only ever be part of the picture. Will media 'channels' even exist in the same way in the future?

Much of what's included here won't be a surprise. The featured trends themselves aren't new. Yet, the combined progress of each, is pushing us towards a tipping point, where solutions are now imperative.

The focus of our trends may be different, but the way we approached this year's report was the same as ever, through a rigorous analysis of industry and consumer perspectives. We surveyed over 1500 people, alongside an ethnographic project to gauge changing consumer opinion and behaviours. Plus, over 30 media partners highlighted

what they will be watching and working on in 2024, so that we can more easily implement it within our client's work.

Adapting to the bigger paradigm shift that this year's trends represent, won't be so straightforward. For now, we're approaching it in the way we tackle any complex challenge – with a culture of experimentation and an appetite to fulfil the unmet needs of our clients' audiences. Innovation is truly at the heart of our 'Good Growth' agency proposition, which is our commitment to driving client growth in a people-centred, responsible and enduring way.

At this point in our introduction, we usually sign off by wishing you a thought-provoking read and hoping that our work sparks ideas and inspiration for the year ahead. After ten years of trends, though, we know enough to recognise 2024 as a big one. So this year, in addition, we also hope this report gives you some courage to run towards, rather than away from, the pivotal changes that lie ahead.



Sophie Harding
Head of Futures and Innovation
Mindshare UK



Contents

Changing relationship with ads, content and data	Changing commerce behaviours	Changing spheres of influence and community	Changing uses of tech
Up Close, Not Personal		Significant Strangers	Generative AI
Messy Media		Real or Replica?	

Ten years of Mindshare's Trends

- Ads With That?
- Video Eats the World
- Destination Data
- Proximity 2.0
- Body Talks
- Green Media
- Retail Media
- Brand New World
- Cashless Society
- Shoppable Media
- Automatic for the People
- Social Unrest
- Over to You
- Game On
- Immerse Me
- Virtual Insanity?
- OM5G
- Home Sweet Home
- Look Who's Talking

Ten years of Mindshare's Trends



2015

Extrasensory Dimensions

Cashless Payment

Everything Connects

Mass Personalisation

Picture This

Quantified Self

2016

Now Culture

Everyday Connects

Rise of the Machines

Touchy Feely

Proximity 2.0

Adblockalypse Now

Content Overload

2017

Reality Check

Hassle Free

Digital Dieting

Connected Me

Tunnel Vision

2018

Get Snappy

The Exploration Game

Access All Areas

Automatic for the People

Destination Data

2019

Live and Kicking

Look Who's Talking

Mindful Media

Seconds Saved

Real or Replica

2020

OM5G

Body Talks

Living the Stream

Brand New World

Ad Breaks

2021

Shoppable Media

The Cookie Crumbles

Home Sweet Home

Game On

Digital Lifelines

Significant Strangers

2022

Green Media

Over to You

Real Life Amplified

Virtual Insanity?

Shoppable Media

2023

Ads With That?

Video Eats the World

Retail Media

Social Unrest

Immerse Me

Synthetic Media

2024

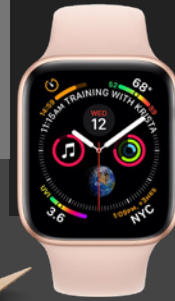
Up Close, Not Personal

Messy Media

Generative AI

Real or Replica

Significant Strangers



MINDSHARE

Ten years of Trends



It's our tenth year of writing the annual Trends report. And to celebrate the occasion, we thought we'd take a moment to look back, rather counter-intuitively, and remind ourselves of all that's happened, and how much things have changed, over that decade. We can also see what we got right and wrong, and, perhaps, even learn some lessons. Let's start with a bit of context – some key tech and media developments and the macro factors at work behind them.



Hey Siri,



Ten years of Trends

Timeline



2014 2015 2016 2017 2018 2019 2020 2021 2022 2023



Facebook buy WhatsApp and Oculus VR

Apple launch ApplePay and CarPlay

Mobile internet use surpasses desktop internet use

Facebook Messenger launch

Amazon buy Twitch

2015

YouTube Premium launched



Apple Watch launched

Windows 10 launched

Amazon launch first physical store

2016

Alexa launched

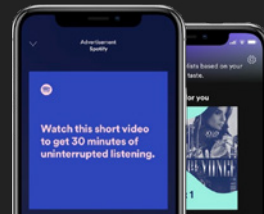
Airpods launched

Curated social feeds introduced

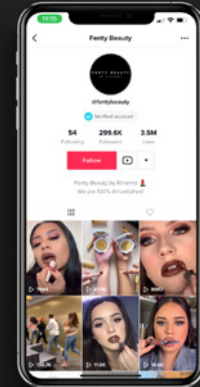
Instagram launch Stories

Facebook launch FB Live

Snapchat and Spotify launch ads



2017



TikTok launched

Apple ARKit launched

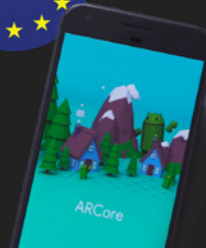
Nintendo Switch launched

2018

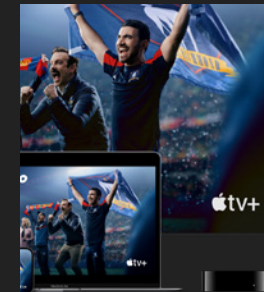
GDPR comes into force

Google launch ARCore

Instagram IGTV launched



2019



Apple TV+ launched

Instagram debut Reels

Google update their search algorithm BERT

Digital advertising spend surpasses traditional advertising

2020



Facebook and Instagram introduce shops

Disney+ launched

Google announce deprecation of third-party cookies

Multiple cloud gaming services launched

2021

Apple ATT introduced

Paramount+ launched

TikTok reach a billion users ww

Sky Glass launched

Facebook change their name to Meta



2022



ChatGPT launched

ITVX launched

Elon Musk buys Twitter



2023

Microsoft buy stake in Open AI

Twitter becomes X



Macro factors at work

UK Prime Ministers

[David Cameron



EU Referendum

[Theresa May

Donald Trump is elected President of US

Rio Olympic Games



[Boris Johnson

Coronavirus Pandemic Lockdowns



[Liz Truss

Queen Elizabeth dies



[Rishi Sunak

Cost of Living Crisis

Tokyo Olympic Games

Ukraine War

King Charles' Coronation

Ten years of Trends

Biggest outtakes from ten years of Trends

Connectivity and data

Improvements in data access and connectivity have fuelled many innovations of the last decade. For example, connection speeds posed a major barrier to tech progress when we started writing Trends. People often had to rely on public Wi-Fi or home internet for big downloads. It's sobering to remember that one of the drivers of our *Adblockalypse Now* trend in 2016 was mobiles being slow to load. Thankfully, mobile internet has seen

rapid improvement, and has provided a springboard for innovation ever since.

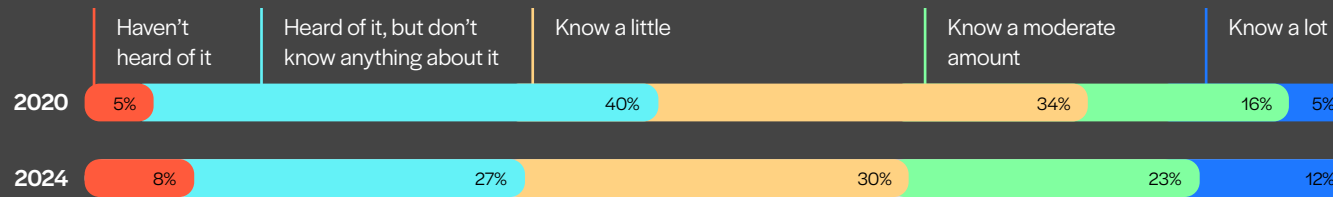
5G was the big noise going into 2020 (our *OM5G* trend), but it's failed to live up to its promise for many reasons, and consumers remain unconvinced. However, this hasn't slowed technological progress.

The IoT (internet of things) was also a major ping on our radar in the first few

years of Trends. In 2015, the smart home was starting to embed itself, with Google's purchase of Nest, plus the launch of Apple's Homekit and Amazon's Alexa. We didn't know how dominant the latter would become, due to first mover advantage. Indeed, a few years later, we were writing a whole trend centred around this and voice technology (*Look Who's Talking* in 2019).



Knowledge of 5G – 2020 v 2024



Ten years of Trends

Connectivity and data

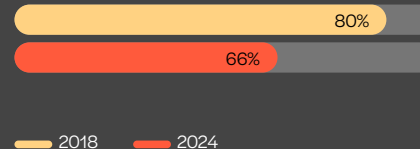


As predicted, smart meters became ubiquitous by 2020 and the pandemic saw a surge of smart home purchases (*Home Sweet Home* in 2021). Multiple operating systems for these devices remain a barrier to progress, even ten years later.

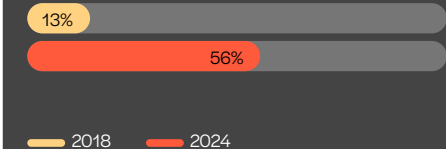
The sources and types of data that brands can access has changed considerably, as have consumer attitudes to brands using their data. Over time, the 'data exchange'

has become more accepted. And as GDPR and Apple's ATT initiative gave people more transparent choices, people began to feel more empowered when it came to brands using their data for marketing purposes. We certainly saw a shake-up of digital marketing in the wake of this. The one area where consumers remain uncomfortable, however, is emotion or mood-based data, as in the trend *Body Talks* (2020).

“Would like more control over what brands do with their data”



Aware of blockchain technology



Ten years of Trends

Biggest outtakes from ten years of Trends

Tech and devices

The smartphone has been at the heart of accelerating and transforming our trends over the years. How many years was it the 'year of mobile'? What's interesting, though, is how we used to think of it as a channel rather than the ubiquitous entity that's interwoven into everything we do now. We started using more apps, features and functions on our phones, and manufacturers expanded capabilities like storage, battery life (yes, AR used to drain our batteries), cameras, facial recognition, Lidar, and more. The smartphone has been the catalyst behind some of the biggest behavioural shifts of the last decade. It has changed the way we shop. It's fuelled streaming while also elevating our comms with instant access to image and video – think social networks, the

creator economy, emojis, infographics and shorter text. Media entities like news outlets have been transformed.

Wearables were prominent in the early days of our Trends reports. We were talking about Apple Watch when it kickstarted the category in Jan 2015, in our trend *Quantified Self*. Perhaps this technology hasn't quite fulfilled its potential yet though. Similarly, despite Alexa's dominance, you could also say the same for voice technology, although there is much more to come! More devices have certainly become internet-enabled in this decade, but not as many as expected, despite the cost of sensors coming down. Where are those smart shelves and RFID-tagged t-shirts we talked about?!



Ten years of Trends

Tech and devices

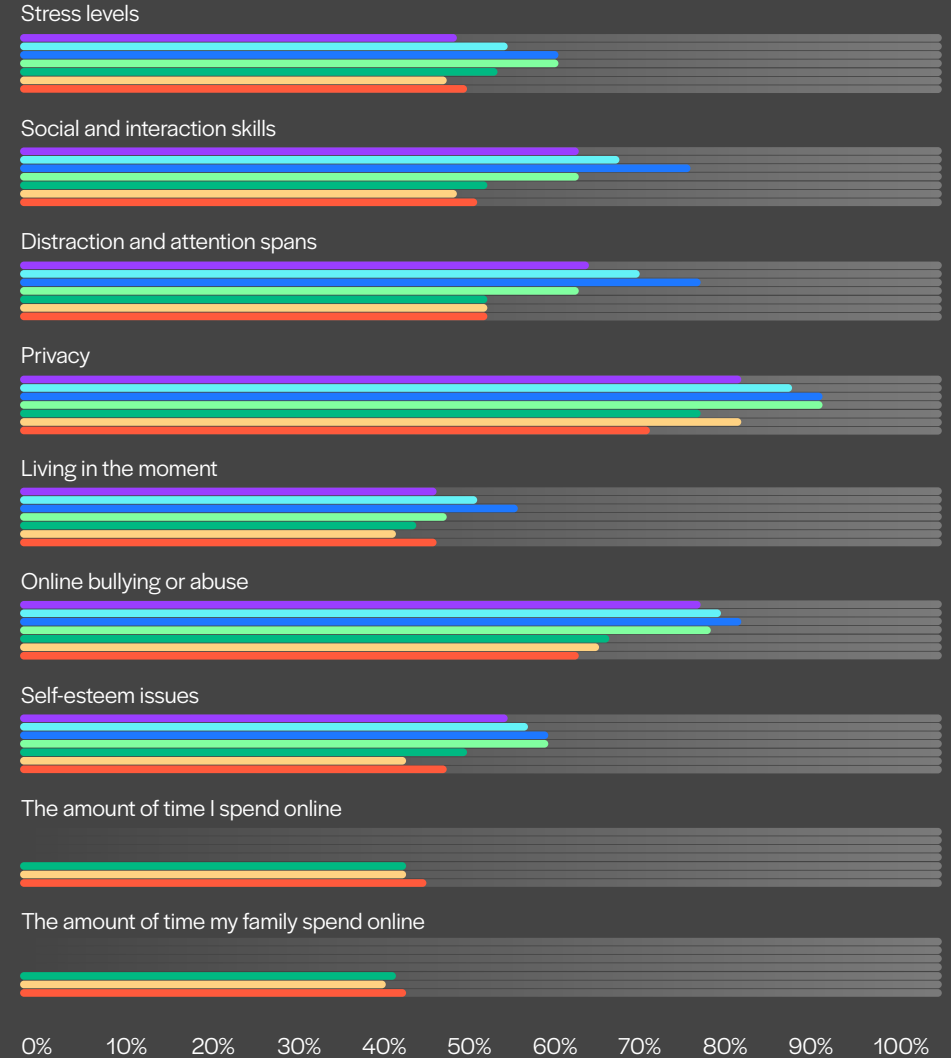


AI, AR and VR have been present in our reports from the beginning. AI and machine learning have been quietly embedded in more of our devices, processes and experiences, but only now are they front of mind, with generative AI turbocharging the conversation. AR has taken its time, but thanks to Lidar technology and better developer offerings, we're now seeing some impressive mobile AR experiences. Viable AR glasses, however, will be a long time coming. MR and VR are becoming more capable and accessible, although a combination of these attributes is tricky. We're still only at the start of what's possible, as the launch of the Apple Vision Pro will demonstrate, but we've come a long way from tethered VR headsets like Oculus Rift.

Interestingly, we were talking about cross-device experiences and measurement for technology like this back in 2015. 'How do we track a digital journey from beginning to end?' we asked. Sound familiar?

Over time, people have become warmer towards technology. Concerns around its use are decreasing, as people weigh up the benefits. A new appreciation for tech was certainly cemented during the pandemic when technology became a *Digital Lifeline* (Trends 2021). People explored new ways of using technology, and established new routines and habits. People are now generally quite positive about what tech adds to our lives, but, as conversations around AI ramp up, we should watch this space with interest.

Concerns around technology



2017 2018 2019 2020 2021 2022 2023

Ten years of Trends

Biggest outtakes from ten years of Trends

Commerce

In the time we've been writing Trends, online shopping and m-commerce (mobile commerce) in particular have exploded. Smartphones have given people not only another means to purchase whenever and wherever they want, but also a different way to research and experience shopping. We've seen the emergence of 'showrooming' and 'webrooming', the dominance of online reviews and the utilisation of AR try-on/visualisation tools. The purchase cycle is no longer linear. Everything is happening more quickly... if that's the way we want it.

There remains an appetite for more considered shopping and this is where stores should play a vital role. We've seen flagship stores integrating more tech

to up their experiential game in recent years. And they need to. People fell out of love with shopping in person during the pandemic, with online shopping surging by as much as 40%. It's more important than ever for stores to provide an experience people can't get online and then link this in seamlessly with their other brand touchpoints. Thankfully we are seeing more brands do this successfully now, rather than just talking a good 'omnichannel' game.

We've seen the rise of marketplaces such as Amazon and aggregators such as Go.Compare, which we refer to as gatekeeper brands in our 2020 trend *Brand New World*. Brands were re-evaluating everything from their products to their selling channels, and we saw the rise of D2C

'The internet has become a global shopping mall with people moving away from "going shopping" to a near constant state of "graze shopping" across a bevy of retailer, social media, service and entertainment platforms'

Mindshare Trends,
Brand New World, 2020



Ten years of Trends

Commerce

(Direct to Consumer) as a result. During this decade, Amazon have set some serious expectations for customer experience. It will come as no surprise that in their 25th year of existence in the UK in 2024, they will account for 20% of all online spend. This decade we've seen more competition between products, more acceptance of white label brands, and brand loyalty start to diminish. We can now instantly order, preorder, have delivered, or click and collect virtually anything we want. A world of shopping options are in the hands of the consumer, and brands are having to rethink.

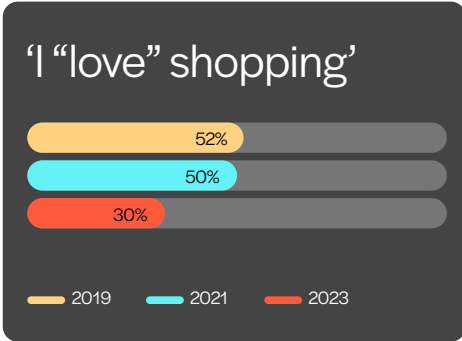
New shopping opportunities like social commerce have emerged, but are taking time to bed in, at least in the West. We called out social commerce in our *Hassle Free* trend (2017), when social platforms were just starting to add buy buttons. But experiences are not proving as seamless as people expect, plus they still have reservations about buying via social media platforms. In our trend *Shoppable Media* in 2022, we talked about this and the 'blurred lines between media companies and retailers'. At the time, this applied more

to media brands becoming like retailers themselves. But, a year later, there was a flip as more retailers started to become media brands in our trend *Retail Media*.

All of these commerce developments over the last decade have resulted in a change in shopping mindset. We're now in a near constant state of 'graze shopping'. Shopping has certainly become more complicated. What we need is a multifaceted commerce strategy. Cue Mindshare.

Perhaps 'shoppable media' isn't that new after all

A partnership between H&M and ShopTV saw Samsung smart TV owners being shown prompts on their screens during a 2014 Super Bowl ad break, allowing them to instantly buy the apparel featured in the ad.



Ten years of Trends

Biggest outtakes from ten years of Trends

Media consumption

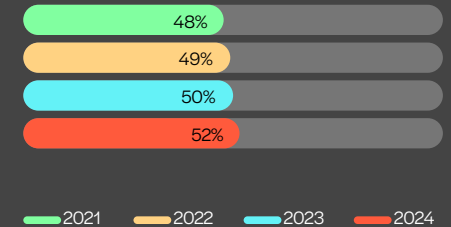
Our media consumption has been on something of a rollercoaster ride this decade, powered by technology and buoyed by the pandemic. Without exception, every media channel has been disrupted and become more complex – new ways to consume, new audiences and new players. Take social media. When we started writing Trends, Facebook and Twitter ruled the social space. Other platforms such as WhatsApp, Instagram and Snap started to gain traction with

younger audiences and there was a shift. All then went through significant change, as they introduced things like the algorithmic feed (in 2016). Then came the launch of TikTok, and everything flipped. Bring on the creator economy, the migration to short-form video and every brand trying to establish its niche. Facebook evolved into Meta and we saw the emergence of our trend *Social Unrest* in 2023, as social platforms doubled down on mapping out their future direction. RIP Twitter.

The rise of streaming is another major media development of the decade. VOD was only just starting to take hold in 2015 and YouTube weren't as dominant, but by 2020 the streaming arms race was on. We warned in our trend *Living the Stream* that there was just 'too much content and our time was finite'. Well, turns out it wasn't. Along came the pandemic. As people spent more time at home and turned to media for respite and fun, all forms of media consumption rocketed. More challengers

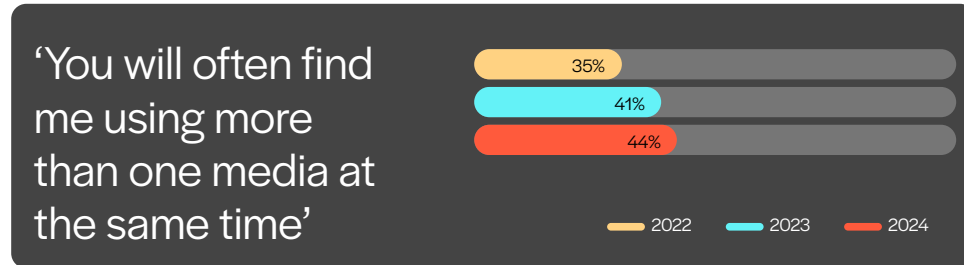


Gaming isn't 'niche' anymore, it's for all kinds of people



Ten years of Trends

Media consumption



to Netflix arose in the form of revamped BVOD channels and new launches such as Disney+ proved popular. Gaming thrived, along with platforms such as Twitch and Discord, and was finally recognised by advertisers as a mainstream activity in our trend *Game On* (2021). People craved connection and our 2019 trend *Live and Kicking* was given a shot in the arm, as live streaming, live gaming and interacting live with shows all thrived. The metaverse arrived with a fanfare in 2021, as Facebook changed their name to Meta, but the industry is still debating what this looks like and whether this concept is *Virtual Insanity?*

What happened next? Enter the cost of living crisis. Some of this media activity got pared back, but the legacy of these new consumption behaviours remains. And now... well, it's complicated. Media has so many component parts and yet is so interconnected, in our trend *Messy Media* (2024).

Where does advertising fit in to all this? So many new places and ways to advertise, with new moments to reach people. And recently there have been even more in *Ads With That?* (2020). We were debating in 2019 whether advertising was broken in *Ad Breaks?* as people



seemed frustrated with the same old things – interruptive, irrelevant ads that are overly salesy. But, then we started to see brands approaching advertising differently and some new formats shine through. Ads started to become part of the entertainment themselves and we also started reaching people in more relevant ways. The old adage of ‘right time, right place and right message’ hasn’t changed in a decade. We’ve just got new means to fulfil it now. Over time, we’ve also seen people become more accepting of the ‘ads for content’ exchange and thankfully *Adblockalypse Now* (2016) never spiralled.





Ten years of Trends

The tech that time forgot

Samsung Bixby AI assistant

In 2020 it was discontinued and the Bixby Button on Samsung devices was removed



BlackBerry

In January 2022, BlackBerry decommissioned the infrastructure and services used by their phone operating systems



Amazon Dash buttons

Amazon discontinued the series in 2019, claiming that it was made unnecessary due to automatic reordering and product subscriptions



Google+

The platform was launched in 2011 and it ceased operations in 2019



Google Glass

Google stopped selling and supporting their Glass Enterprise smart glasses in March 2023



Vine

The service was bought by Twitter, Inc. the year before its 2013 launch, and was shut down in January 2017



Snap Spectacles

The next-generation Spectacles are not available to the public



Google Cardboard

Google stopped selling and supporting their Glass Enterprise smart glasses in March 2023

Google Cardboard

Officially introduced at the I/O developer conference in 2014



Utelly

Utelly is an all-in-one universal remote, TV guide and catch-up service for mobile devices



Facebook Pokes

Yes, poking is still a thing on Facebook



Oculus Rift

Launched in March 2016. In 2021 the Rift S was officially discontinued

Ten years of Trends

So how did we do? (Are we at mainstream adoption yet?)



Nailed it

Connected TVs

Smart meters

Smart speakers

Infographics

Emojis

Self-serve checkouts

Livestreaming

Wearables

Fake news

Airpods

Biometrics

Apple Pay

Podcasting

Contactless payment

Cashless society

Voice notes

Click and collect

Streaming wars

Automated customer service

BNPL services

Live gaming



Nailed it... eventually

QR codes

Social commerce

Augmented reality

Speech to text/text to speech

Smart plugs and lighting



Buffering

Virtual and mixed reality

Digital/virtual assistants

5G

Voice commerce

3D-printed products

Virtual influencers

Video aggregation services

Implantables and ingestibles

Self-driving cars

Blockchain

Sensory media

Metaverse

Haptics

NFTs

Connected clothing

Cryptocurrency

Programmatic commerce

Gesture-activated tech

Visual search

Delivery drones

Live shopping

Voice-activated everything

Error message

iBeacons

The year of mobile (again?!)

Snapcash

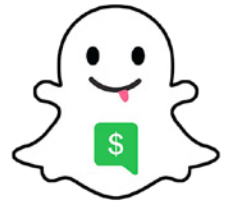
Delivery to the boot of our car

Smart ink

Touchscreens we can feel

Smart shelves

Connected FMCG products





Ten years of Trends

Ten years ago... how consumers remember it

Connectivity and data

People underestimate how long smartphones have been around. The iPhone was launched in 2007 and by 2015, when we started writing our Trends reports, smartphones had around 70% penetration. However, when asked to think back ten years, people don't remember if all family members had them. What they remember quite accurately, however, is sketchy connectivity. 4G was far from available everywhere or up to par with other countries. Many relied on Wi-Fi hotspots or Bluetooth while out and had low data packages. Average home internet speeds were around 20Mbps. Many only did anything data-heavy at home. Clearly this has seen dramatic change. Faster internet connectivity has been an enabler and one of the top three things people have found most valuable about technology developments over the last ten years.

Tech and devices

People also underestimate how much they were using their smartphones. They don't remember using many apps or spending much time on their phone, outside of phone calls. The fact that things like online banking and general browsing were already well established suggests this is not entirely accurate. The phone just didn't 'feel like the all-in-one device we have today'. This may simply reflect how much our mobile digital activities have been consolidated into one device compared to ten years ago. At that point we did still own separate digital cameras, DVD players, gaming consoles and radios, although the BlackBerrys and iPods people reminisce about would already have been a memory. Tablet penetration was also pretty well established in 2015, which isn't recalled.

Most valuable thing to happen in technology over the last ten years?

Rank 1 to 10

	All adults	16–24
The rise of online shopping	01	05
Contactless payment	02	01
Faster internet connection (e.g. 4G and superfast broadband)	03	04
Everything being integrated into my phone (e.g. camera, apps, etc)	04	03
Being able to access media whenever and wherever I want	05	09
Everything moving to streaming (such as movies, music, games)	06	06
The increased use of messenger apps	07	08
Being able to access media digitally rather than physically (e.g. newspapers)	08	10
Having access to voice devices such as Alexa	09	07
The evolution of social media platforms (e.g. the launch of TikTok)	10	02

Ten years of Trends

Ten years ago... how consumers remember it

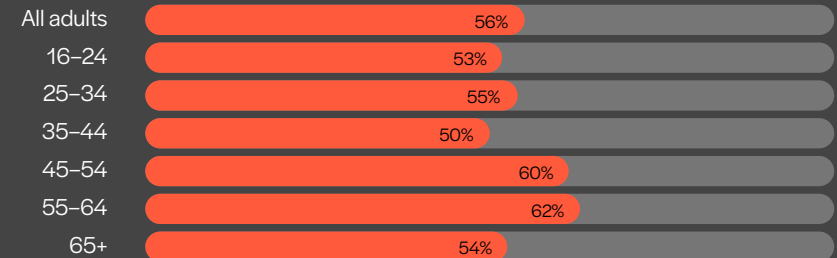
Media consumption

The days of more prevalent streaming were about to kick in, and people started to discuss music and movies becoming more 'accessible'. Though they also remember watching a fair bit of live TV and renting DVDs. Streaming video was well established by then – Netflix and YouTube had been around for a while – but choice of content was a bugbear. Though this could equally be a memory distorted by comparison to the overabundance of choice we have today. Podcasts 'weren't really a thing' yet, although would have existed. Social media was viewed as being in its 'basic' days, which people recall quite accurately, calling out Twitter and Facebook as the most popular services of the day. Younger people were starting to migrate to smaller platforms like Snapchat and WhatsApp. Smart speakers and Alexa were released around 2017, but, although they have changed music consumption, weren't viewed as a gamechanger over this period.

Commerce

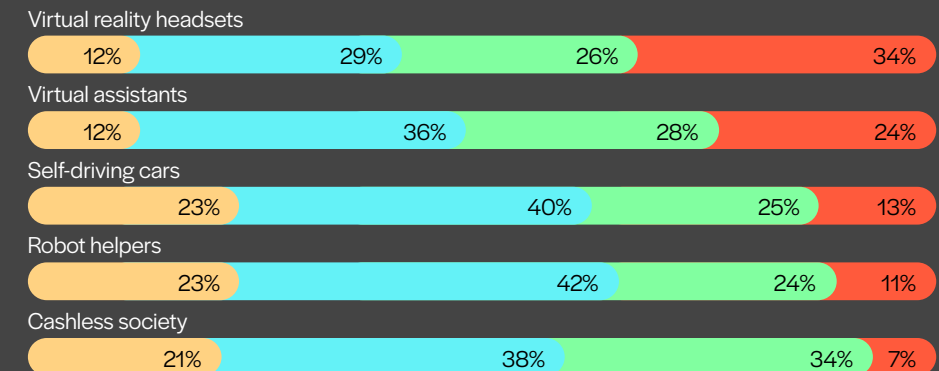
The rise of online shopping is viewed by people as the biggest revelation when it comes to changes wrought by tech in the last ten years. It's affected so many elements of people's daily lives, while turning the purchase cycle upside-down. People were shopping online ten years ago, but fuelled by the growth of m-commerce and the pandemic, it's become mainstream, with the online share of retail sales more than doubling. Amazon have become dominant over this time, setting expectations in the shopping and customer experience stakes. Integrated and contactless payment has also been an (under-the-radar) revelation, and people can now more easily visualise a cash-free society, although some remain wary.

'Thinking back to ten years ago, technology has improved my life for the better'



Legend for achievement status:

- Yellow: We have achieved this
- Cyan: We are in the process of achieving this, and it will happen soon
- Green: We are in the process of achieving this, but it is still a while away
- Red: We are nowhere near achieving this



What have we learned from a decade of writing ‘Trends’?

Even if things can get a bit squiggly on occasion, we think it's important to monitor the trajectory of trends, write the trends Report each year, and use it as a springboard for the work we do. To prove it, here are ten actionable things that this decade has taught us about trends...

Ten years of Trends

01

People's unmet needs should trump everything... but it's complicated.

Innovation trends show us what people always wanted even if they didn't know it. They also show us the opposite. A technology or media innovation that doesn't take is like a comedian who doesn't get laughs – the brutal silence speaks for itself. Hello smart shelves or connected FMCG products. Just because you can connect everything in existence to the internet, doesn't mean you should. But perhaps there is an unmet need for these things; it just

hasn't been uncovered yet. Unmet needs are fragile things. Different contexts can change them. And they need to be met at scale. They can be emotional as well as practical – few lives had a TikTok-shaped hole in them, but now they have way over a billion users across the world. Sometimes, the unmet need is there, but we just can't fulfil it. We can see when a market is failing consumers, when the appetite for new ways of doing things (aggregated streaming, for example, or the connected home) matters less than a company's desire to sell their own entire ecosystem. It's complicated.

02

The trajectory of trends is complicated – their impact happens over time and it's all interconnected.

A trend is more than a new technology or media development – it is the way these things and their associated behaviours become more mainstream. We've watched trends evolve, align, marry, diverge and multiply, and it's the pattern to these developments that tells us about our audience's lives. Behaviours, and thus trends, are not siloed. They live in a complex interconnected system, and trying to have a singular view of them is nigh on impossible.

03

Tracking the conditions in which trends happen is fundamental.

Surprise, surprise, technology and media developments don't happen in a vacuum. Society, politics and the economy are all factors that have a considerable influence

over their development and progress. The QR code was a solution in search of a problem until a global pandemic turned up. Our Trends report for 2021 was the most difficult we've ever had to write. We went back to the drawing board with all our trends as Covid flipped everything on its head. But Covid is only

the most extreme example. Consider the relationship between cost of living and people holding off buying new technology, or the rising distrust of institutions and your audience's social media usage, or the effect of GDPR on your data-led marketing. The examples are endless.

Ten years of Trends

04

Keep your eye on those longer-term trends and not just the steps along the way.

A reminder of Amara's Law – 'people tend to overestimate the short-term impact of new technologies while underestimating their long-term effects.' Some of our trends are more immediately impactful, but often these are component parts or steps along the way to a bigger paradigm shift. And there's nothing wrong with that – Trend reports are here to monitor new developments along the way. But it's too easy to jump on things that are moving quickly as it feels like they will have greater impact right now and everyone wants first mover advantage, right? Along with this though, don't forget the bigger picture a lot of these things are buried within. Telling the difference between a new development and a paradigm shift is tough, but you can't tell the difference if you're not paying attention.

05

It can take multiple attempts for an innovation to find its final form.

Start-ups are used to pivots. They respond to customer feedback and change their offer, sometimes their whole business model, to meet a need. For new technologies, there's an alchemy when

use case meets unmet need meets the right interface, but it can be hard graft to get there. Capability is not the same thing as functionality – understanding the delicate interplay of these new entities as they emerge is key. If QR codes can come into their own, who's to say, with the right function attached, NFTs can't do the same? Virtual assistants haven't

taken off to the extent we thought they might when we flagged them in 2016. Their capabilities have been impressive, but the tech hasn't quite been able to interact in the fluid way people would like it to just yet. Perhaps with the rapid ascent of generative AI, a world of more useful virtual assistants is still on the cards.

06

People are unreliable witnesses to their own behaviour.

Be wary of predicting the future based on the past... or the remembered past at least. We still think it's essential to have a consumer research element to our trends methodology to gauge nuances of opinion, but we are very aware of the risks

of claimed behaviour. And perhaps less obviously, the tricks people's memories play when thinking about the past. When we asked people to remember their use of technology and media ten years ago, what they recalled was more reflective of 20 years ago. More fundamentally, people remember life before and after the innovation, but not the messy journey in between. We've all put BlackBerry

and the travails of the mobile internet out of our minds, with good reason. In some ways, this reveals the value of trendspotting and our Trends reports. Tracking change as it happens gives us a far richer picture of people's needs and priorities as technology iterates its way to indispensability. Progress isn't linear, but it is where we learn the most.

07

Adoption isn't universal – and there is insight in the nuances.

A trend will look different depending on your point of view. That's why we've always split our analysis between early adopters, mainstream tech adopters and slower adopters. It makes technology

a fascinating lens through which to view our audiences, since the rate of adoption varies dramatically, especially between urban and rural environments. Sometimes this is surprising. And sometimes, as we see in Londoners' accelerated take-up of automation as a way to avoid small talk, it's absolutely what you thought it would be.

09

Beware 'The Year of...' something.

Very occasionally, all the conditions are in place for a tipping point at a very specific time. Perhaps a number of providers stumble across the same technology or are working on media developments at the same rate. Maybe

enough people are adopting it for it to count. But whether it's mobile, short-form video or retail media, new behaviours are developed and entrenched over time. Only by committing to tracing these in granular detail can you avoid being assailed each year with vacuous claims of 'it's the year of...' Was it really? Hindsight is a wonderful thing!

08

Innovations don't get old, they become invisible.

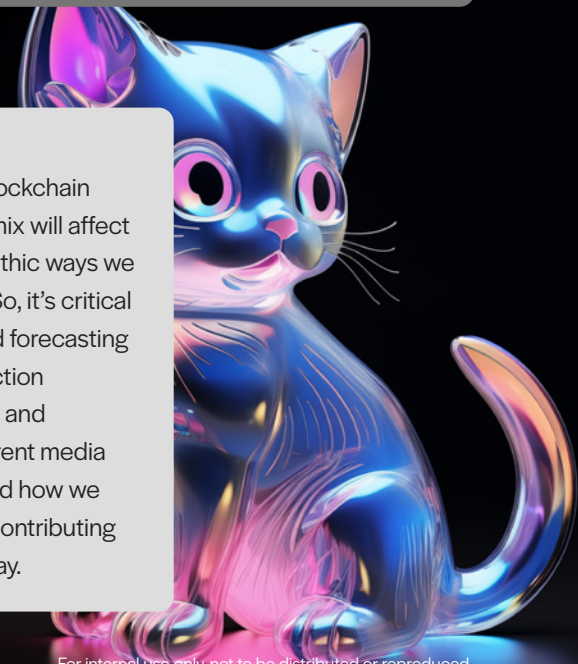
New technology sets new expectations, but it also sets new standards – Amazon-level customer experience, for example. Sometimes new capabilities save us mere seconds, but we feel entitled to them just as instantaneously – contactless payment or smart home applications, for example. And technologies that work simply become embedded into our everyday lives and we stop thinking about them. Think about the 'AI effect' and how we have become somewhat oblivious over the years to the presence of AI across pretty much all parts of our lives.

10

The next ten years will be very different to the last ten.

We're already noticing a tonal shift. If the last decade was characterised by tech bros wanting to 'move fast and break things', it's becoming clear that we now need to fix things. Or, at least, handle them more carefully. We've had years of political, social and economic

upheaval; adding AI, blockchain and deepfakes to the mix will affect people's lives in monolithic ways we don't yet understand. So, it's critical to remember that trend forecasting is more than just prediction – it's a way of analysing and understanding our current media and tech landscape and how we should be reacting or contributing to that... in a positive way.



MINDSHARE

Trends within
this theme

Up Close, Not Personal

Messy Media

Ads With That?

Video Eats the World

Destination Data

Proximity 2.0

Body Talks

Green Media

Changing relationship with ads, content and data

Trend 1

Up Close, Not Personal

Personalisation has evolved, leaving space to be properly people-centred again



Ten years ago, our first Trends report featured a trend called *Mass Personalisation*. In 2024, the landscape of targeted, 'personalised' advertising will look very different. Instead of using individual customer information, brands will build intimacy through understanding and accessing different contexts in the most relevant way possible.

Google, of course, are committed to the death of the cookie by summer. But before then – from 6 March, to be exact – the Digital Markets Act (DMA) will profoundly change the EU digital landscape yet further. The DMA sets out dos and don'ts for companies identified as digital 'gatekeepers' (i.e. Google, Amazon, Apple, Meta, Microsoft), forcing them to compete fairly and giving consumers more choice.

Those platforms are likely to rely on user consent updates and passing data signals to avoid penalties. But, all of these changes offer a broader opportunity for brands to rethink how they build, capture and

activate against consumer signals like never before. With off-the-shelf solutions such as in-market and retargeting in rapid decline, 2024 will see a new culture of experimentation in audience targeting. There is no silver bullet, so the smartest brands will likely take a combination approach to building and testing data signals, which will require ongoing refinement to reach the performance levels that cookie data provided.

Ten years ago, the opportunity in digital environments was so huge we overloaded them and forgot about the user. Now, we're better at navigating consent (thanks to GDPR) and we've witnessed an explosion in addressable media that opens up new possibilities. We can buy hyper-specific placements, merge multiple fluid data sets, and generate unique creative assets as the need arises. But, in addition to this, we must remember that it's an expertise in context that will create competitive advantage. Instead of mass personalisation, we'll value empathy at scale. Alongside technological capability, some humanity.

Up Close, Not Personal

01

Five areas to watch

The power of context

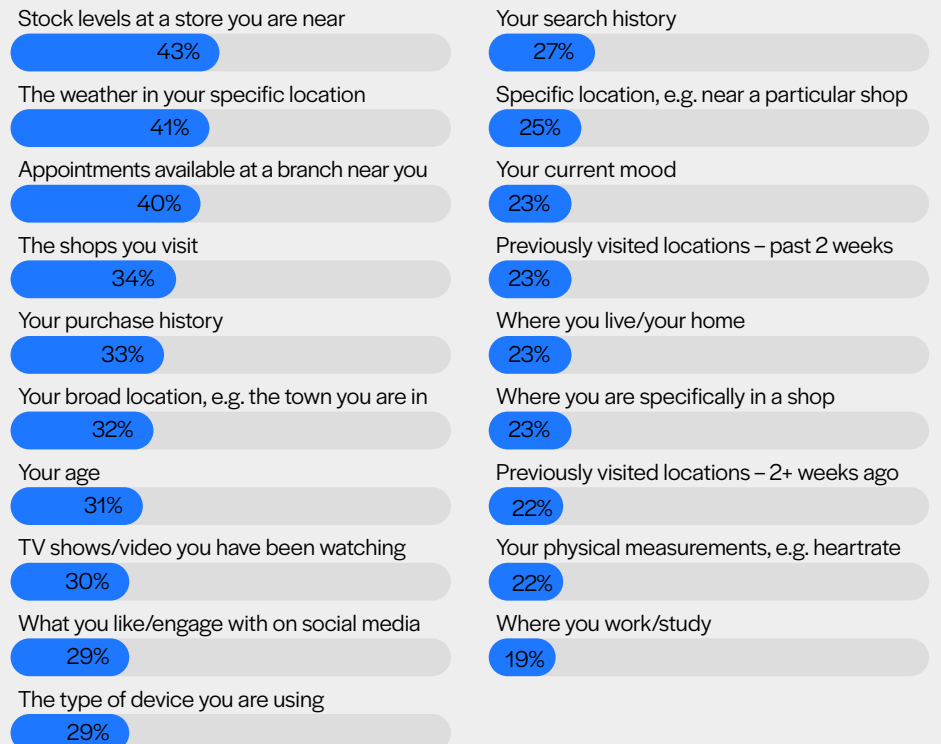
According to our survey, fewer people today trust companies to use their data responsibly (33%) than they did even three years ago (47%). We found 58% already think that ‘companies make too many broad assumptions about me when using my data’. In an ID-less world, this makes personalisation riskier than ever. Users have more means to avoid handing over data, and they are adopting different identities on more platforms. So, as we migrate towards a ‘topic’ approach in our targeting, we need to ensure we don’t pigeonhole people.

The good news is, we also have more data sources at our disposal, many of which are underused. The other good news is that most people would prefer to see relevant ads. They just don’t want to give away data they see as being personal to them. The key is being sure to use data that helps match the message to the mood of the moment, and understanding the context in which audiences are most receptive.

Where does data sit in this? Our research suggests the most popular priorities for tailored ads are services such as localised stock levels and available appointments. So, while we’re used to seeing individual customer records and CRM databases as the critical data points, next year will see more brands unlock the value of their own real-time business data, especially when it can link media to bottom-line metrics more directly. The brands that win will be those that combine their own data with traditional panel sources and publicly available, ‘fluid’ data sets that help identify and then access different contexts in the customer journey.

At Mindshare, we’ve worked on retail campaigns that merge product sales data, cultural hot spots, and search analysis to reflect changing moods and priorities of multiple audiences. As context supercedes 1PD, we predict a surge in brands targeting need states rather than individuals. It’s media planning, updated for the addressable age.

How useful would you find it if brands tailored ads to you based on the following?



Up Close, Not Personal

02

Five areas to watch

Location: the new currency?

Geo is back! 2024 will see the next phase of granular, cookieless targeting, courtesy of location. It provides a common currency for multiple data sets, enables a rich picture of people's behaviour, and allows for holistic, cross-channel activation.

Geomapping is unlocking all manner of opportunity. A few years ago, we were buzzing about specific location and precision platforms like What3Words. But now the conversation has shifted. Context is king in 2024, so expect more advertisers to infer meaningful insights not only from the beginning and end of a journey, but also from the movement in between. Travel patterns, high street footfall, the rhythm of communities – all offer a canvas for richer activity. In 2024, location is more than proximity. It's a proxy for mindset.

We will see a rediscovery of geodemographic tools like MOSAIC to understand a neighbourhood's character, then cross-reference that with mobile

behaviour and retail locations to find the right moment to intervene. An insurer, for example, might map flood risk by region against vehicle registrations and housing stock, using the outputs to calculate where it's worth spending money.

The full power of geo is unlocked when it's powered by client data, such as store and online sales, footfall data by location, region, store or restaurant, for example. But it's also going to be enabled by the work media brands are doing to bolster their addressability and location-based targeting. Vevo are partnering with Blis for more granular location-based behavioural targeting. ITV, as part of their commitment to digital measurement, are rebooting regional testing with A/B 'geo-experiments'. And GroupM's NexusGeograph is an in-house data integration system using geography and location to identify key audiences through a blend of data (both 1PD and third party).



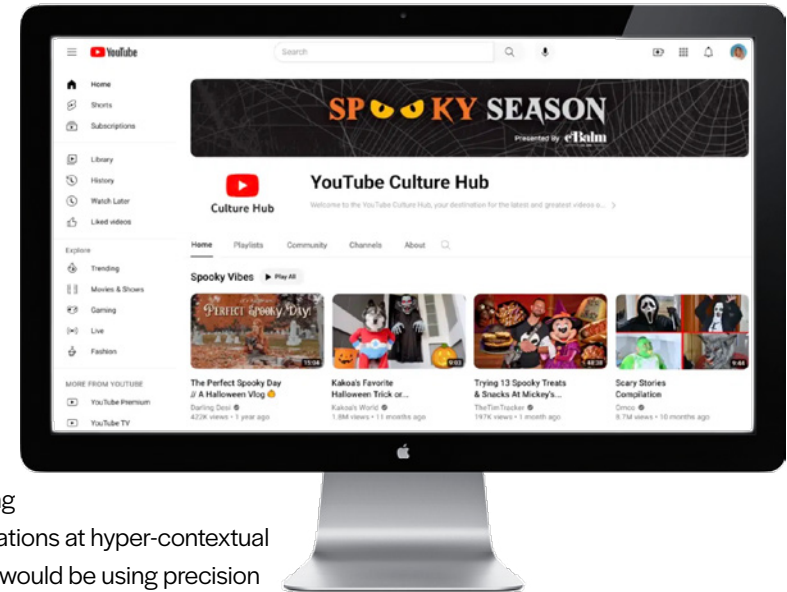
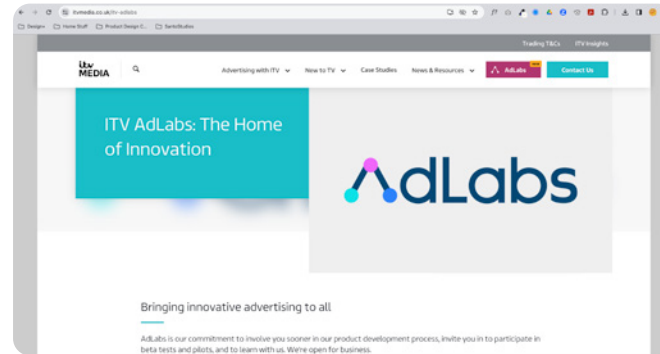
group^m
nexus

Up Close, Not Personal

03

Five areas to watch

Content gets hyper-contextual



Every streaming platform UI comes loaded these days with 'micro-genres'. It's a win-win. Users get a more structured choice of content; platforms get an additional layer of preference data. Expect advertisers to be able to tap into more of this as media brands offer AI-enabled access to increasingly specific content.

ITV's AdLabs is a pilot for 'content clustering' that defines ever more granular audiences across the platform. In publishing, both Reach and News UK are using AI-enabled content labelling to

create more bespoke content experiences. YouTube have just announced Spotlight Moments, an AI-powered tool to serve ads during cultural moments. Acast are developing speech-to-text technology that will soon allow brands to target podcast episodes according to the topic being discussed and the language being used.

Our qualitative research shows that this is a type of personalisation people are likely to appreciate, because it feels more natural and relevant than creepy. But there are wider implications for advertising. The

development highlights AI's potential to apply performance principles earlier in the customer journey. By creating new brand associations at hyper-contextual moments, brands would be using precision targeting to create mental availability. Brands can go beyond in-market individuals to target mindsets and need states, creating and leveraging placements that have greater impact and favourability.

Up Close, Not Personal

04

Five areas to watch

Context and content: the dynamic duo



We've been talking about dynamic creative optimisation for a while, but we anticipate that the advent of more advanced AI will finally make it more actionable at scale and in real time. The way it's being integrated will also mean media and creative are likely to become more aligned than ever. Technology that's currently primarily used to optimise media placements live will be, with the introduction of generative AI, able to optimise creative execution in real time – tools such as Google's PMax or Meta's Advantage Plus, for example. These tools have previously been about the optimisation of where and how often content should appear, but they will now be able to determine the most effective creative messaging

and create an ad that resonates with that placement. The trend is already spreading to broadcast channels. JC Decaux have VIM – AI software that optimises creative in real time. Many of these tools are limited to their own ecosystems, but in time we'll see more cross-platform solutions emerge. Finecast are already partnering with other WPP companies like Choreograph Create to evolve beyond not just optimising the media placement to delivering addressable creative messaging at scale on the TV screen.

In an increasingly connected ecosystem with audiences addressable from insight to execution, none of this should be thought about in isolation. That's why Mindshare

developed Empathetic Executions, our addressable marketing practice. It's an evolution in planning practices combined with a suite of capabilities and proprietary technologies that informs everything from enterprise-level strategy to execution and understanding, continuously informing audience engagement.

By bringing context and content closer together, marketers now have a real opportunity to create highly personalised relevant campaigns that resonate on a deep level. It is clear that tech will not achieve this alone, but with man and machine working in harmony over time, the possibilities are exciting.

05

Five areas to watch

More adaptive measurement

A shift to more fluid data sources and more dynamic activation demands more adaptive measurement. Since planning for context can be more labour-intensive, with more data to process and pay for, we need to know the premium is worth it.

Accordingly, the 'last click' approach is already changing. New tech, such as server-side tagging, and new models like Google's consent model, which evaluates conversion from users not opted into cookies, are becoming more common. It's part of a new 'full stack measurement' philosophy, with the gap between high-frequency, tactical optimisation and high-level MMM being bridged by new analytic approaches. At

Mindshare we call ours RMA – Reactive Media Attribution. It derives better business insights from granular data, without the wait and cost of econometrics. In a fluid landscape, it keeps brands agile.

Thanks to addressability, test-and-learn is changing, too, with location a common currency throughout the process. Already in 2023, we've run tests that have used multiple data signals to prioritise and target regions dynamically based on sales potential and weather signals. This has allowed for daily optimisation across countries and channels: digital audio, mobile and programmatic OOH delivering strong returns.



Five steps to getting future-fit

01

Forget customer IDs, and instead forge a strategy based on the business data your customers and prospects are most interested in.

Stock availability, offers and rewards, popular services. The more your communications reflect the real-time priorities of your audience, the more relevant it will be.

02

Harness the new tech's precision capabilities by identifying the emotional need states where your brand can add the most value.

By mapping the most effective contexts and most important aspects of your customer journey, you can unleash the full power of technology while still respecting your audience's privacy.

04

Develop the right analytical approach for your business.

A more fluid media landscape demands a more fluid approach to evaluation, so spend time working out the critical KPIs and the right model to drive better decisions within teams.

03

Lean into your brand's geographical footprint so you can make more of media's addressability.

This isn't only mapping stores and footfall, it's about understanding the distribution of your customers. Localised characteristics and preferences make for great insight and can drive activation directly.

05

MOT your access to data.

While the principle of full stack measurement is simple, populating your model with the right data might not be. An upfront dialogue with your data suppliers (and media agency!) can remove any blockers that can prevent your measurement strategy.



Messy Media

The media industry adapts to suit the increasingly 'messy' and interconnected media landscape

Media today is getting 'messy', meaning things no longer fall into the neat(ish) silos they did when we started writing Trends ten years ago. TV was TV, radio was radio, print was... mainly still a physical format. With digitisation, channels are increasingly merging into one another and, to coin a buzzword, becoming more... omnichannel. In our '*Video Eats the World*' trend from last year, we explored how consumption of video content was blurring and being dictated by consumers, with content owners and distributors adapting to follow their viewers. But it's not just video

where this is happening and we are set to hear even more from media companies adapting their business strategies in 2024.

While media consumption has grown significantly in the last ten years (daily time spent engaging with some form of media has doubled from under eight hours to over 16), headroom for further expansion is limited. We do have to sleep at some point! We're seeing fragmentation of media usage and diminished attention due to increased multitasking and second screening.

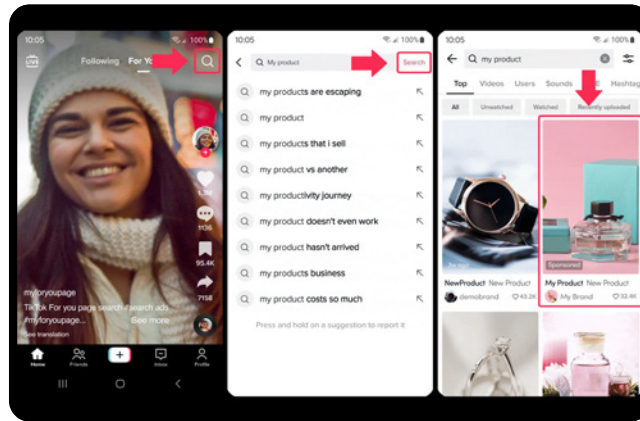
This is forcing change in the media landscape. As media companies try to future-proof their brands and find new audiences, a *Game of Thrones-esque* scenario is emerging. Either take the Lannister route – grow kingdoms in walled gardens – or the Stark and Targaryens route – build alliances that extend your footprint. Some are hedging their bets and doing both! Equally, media agencies are reshaping their structures to align across channels, data and solutions, with the industry taking common approaches to measure advertising impact across media, from brand to performance.

Messy Media

01

Five areas to watch

The evolution of the 'channel'



Consumers are media-savvy. They use it for their own ends, unconstrained by the intent of publisher or platform. That might mean embracing shoppable TV or migrating their search behaviour into social. Last year, 13% of TikTok users turned to the platform for search. That's jumped to 20% this year. (It's no wonder TikTok have introduced search ads.)

To hold attention and maintain reach, media owners have adapted distribution and formats to address demand on consumer terms. Less 'build and they will come', more 'build wherever you find them'.

Sometimes this means finding new means of distributing content to maximise audience reach. Channel 4 now share programmes on YouTube rather than directing all viewers to their own ecosystem. News UK have launched Times Radio and put investigative journalists at the heart of video documentaries to offer a choice on how you keep up with news.

Formats for content are shifting, too. Concert films became bigger in 2023, as Beyoncé and Taylor Swift turned tour content into films. In the 1960s, The Beatles crafted three-minute pop songs to leverage radio and took over the world. As brands like TikTok continue to upend the music industry, artists write 30-second hooks to play over Instagram reels and TikTok posts. And while we're used to watching movies with occasional ad breaks, Paramount made the entire film Mean Girls available as 23 short videos on TikTok. Podcasts are now filmed for social platforms as 'vodpods', leading Google to ditch its podcast app and move to YouTube Music in 2024.

Media has always evolved, but the influence consumer behaviour has on developing new formats is increasingly driving media owners to innovate and expand cross platforms. The question is, will 'channels' even exist in future?

Messy Media

02

Five areas to watch

The further extension of IP and the blurring of entertainment

Entertainment is no longer split into books, film, music, fashion or gaming, but is a melting pot where intellectual property (IP) is reimagined across passions and platforms. For instance, ITV have adapted *I'm a Celebrity* for gaming, creating a Fortnite experience where fans can play challenges from the show. HBO's TV show *Succession* has a podcast. Netflix brought *Stranger Things* to their mobile gaming proposition a few years ago, and are testing to roll out more shows as games on a wider variety of devices, with phones enabled as a gaming controller for your TV.

But it goes deeper than making IP available on other channels. Content is being carefully crafted, and complex transmedia strategies developed, with storytelling deepened in complementary media rather than each medium retelling

the same story. *The Last of Us* franchise, for example, saw the TV series exploring characters that hadn't been unveiled in the original gameplay. And sometimes the IP is handed over to fans in different channels. Disney's recent partnership with TikTok for their 100th anniversary, saw fans able to create their own videos with Disney music and effects.

As boundaries continue to blur, expect to see IP holders further explore translating their brands across platforms and deepen engagement with enriched storytelling. Will we see Percy Pig break out from the M&S shop floor to star in his own series and gaming dynasty? And expect to see entertainment formats get ever less clear. Was that a game, movie, TV show, book, or song first? In years to come, no one will remember.



Messy Media

03

Five areas to watch

The rise of the powerhouses

Media companies are smartly shifting their positioning. TikTok market themselves as an entertainment brand (and probably soon a commerce brand), Snap are a camera company, Condé Nast are no longer a magazine company. These wider remit give brands freedom to move into any space they choose, future-proofing themselves.

Moving to cross channel provides access to new audiences at new moments, increasing reach and 'stickiness', plus more opportunities for ad revenue. It's why we saw an explosion in new ad propositions in last year's trend *Ads with that?* Take Spotify, who expanded into audio books. Or Netflix, who are opening physical spaces. Media brands

are cultivating their own ecosystems, with a need for user data also a big driver.

Media brands will also become fiercely protective of their content and data, taking a more 'walled garden' approach. We've seen publishers stand against generative AI models (LLM's) using their content, for example. On one hand, this is good for advertisers. It brings expanded propositions with more access to data and new ways to reach audiences. On the other, it becomes increasingly complicated to join the dots across the entirety of the plan.

For consumers, it's complicated. They're faced with ever-increasing choices that look similar. User experiences might be seamless within a media ecosystem, but



people really want everything connected: 47% would like 'one place where I can see everything I have access to across my subscriptions' (up from 36% two years ago). Perhaps this is where superapps come in. Popular in Asia, superapps host every tool under one roof, from messaging to social media, with the ability to make transactions. It's everything Elon Musk has in mind with X 'the everything app'. He's

just added the ability for it to make video and audio calls. TikTok may be starting to head in this direction too, as they look to add book publishing, music streaming and messaging to their functionality. Superapps may not land in the West just yet and regulators will have something to say, but they are something to watch.

04

Five areas to watch

Stop, collaborate and listen



Although we're seeing media brands up the ante on building their own ecosystems, many are also recognising that to grow or achieve their wider ambitions, an element of collaboration with other media brands is beneficial. Often, it's a smart way to boost awareness and reach new audiences. This could be through longer-term strategic alliances, as has happened with Uber and Spotify, or C4 and YouTube. Or it could be for short-term activations such as Disney with ESPN, who partnered to simulcast a live NFL game set in the Toy Story universe. It could also be about offering new propositions for advertisers. Last year, we mentioned retail data agreements between Tesco and Boots with ITV, and Nectar with C4. Now, Ocado and Lidl have also partnered with the Trade Desk, to give advertisers exclusive

access to their audience segments. As TikTok look to expand their reach to offer ad solutions beyond mobile phones, they have also looked to partners to extend their content into places such as billboards, cinemas, bars, garages, retail locations and more. This built on their partnership success with Redbox, which featured TikTok content on over 3,000 kiosks. Now they've extended the approach to more media partners, including Vevo, ReachTV, Loop TV, Raydiant, GSTV, Screenvision, DIVE Billboards and Adomni.

As complementary offerings start to come together more readily, could we even see some consolidation happen in 2024 across the media landscape? Maybe a step too far, but one to watch.

Messy Media

05

Five areas to watch

Navigating the messy media landscape



Media agency client teams have always adapted to an ever-changing media landscape. From being set by channel specialism, such as TV, radio and OOH, and now more recently the advent of AV teams, and Display teams. This coagulation of channel specialists – more integrated and connected more neatly – enables them to be activated in a more aligned and coordinated way.

In a more rapidly fragmenting media landscape, the only thing for certain is that change is now the only constant. A static structure and approach to

planning risk missing out on the next evolution of modern marketing and media performance; that of integrated cross-channel planning and execution. It is here that modern channel planning and optimisation moves to optimising towards a single campaign KPI. This omnichannel approach helps determine the success of the entire media plan, delivering both improved business performance and media experience. A flexible, integrated resource such as GroupM's Nexus offers a smart solution designed to address these challenges. Nexus offers advertisers access to advanced TV, audio, DOOH,

video and display media via one access, plus it enables brands to leverage geo as a privacy-safe way to understand and reach audiences. As individuals move between media and locations, curating their own experiences, brands can match their movement with singularly planned, targeted and programmatically executed omnichannel media.

Of course, a requirement for more connected cross-channel media is consistent cross-channel measurement. Moving away from 'last click' measurement solutions to reinvigorating an agile test-

and-learn mindset is key to identifying cross-channel successes. Excitingly, the launch of ISBA's Project Origin is on the horizon and entering beta testing with a full launch in 2024. It promises to offer a common measurement approach across both broadcast and digital AV channels, meaning Origin will provide objective, comparative metrics across channels, from the top to the very bottom of the funnel. Expect to see the industry adapt in even more ways to help navigate this messy media landscape in 2024.

Five steps to getting future-fit

01

Avoid siloed channel thinking.

Don't pigeonhole media companies in their heartland. Consider how their new distribution channels open up different possibilities to partner with them in entirely new ways.

03

Watch for disruption in how media is used, and test.

Make your brand visible in social search. Extend your video distribution into ad-funded streaming platforms. Utilise AI to supercharge your dynamic ad game.

05

Evaluate your evaluation.

Cross-channel planning means comparing apples with apples to make the right optimisation decisions. Shift away from metrics media designed to measure specific channels and focus on those that measure the overall campaign impact.

02

Look for ways to build and capitalise on your intellectual property across channels.

Brand equity will be built by deepening storytelling across multiple, complementary touchpoints and IP is a route in. Don't just tell the same narrative, unveil parts of your brand story in fresh ways for different media.

04

Embrace the value of second-party data.

As they expand cross channel, data from media brands is becoming even richer. Get comfortable tapping into their bespoke data sets, as these will provide greater opportunity to find growth audiences, potentially alongside your own 1PD.

How are our other trends doing?

Ads With That?

New ad propositions and formats continue to emerge, as businesses look for new revenue sources and respond to changing audience consumption habits. Amazon Prime have introduced a new ad-funded tier and Netflix are about to unveil new ad formats, for example. But this year, we will also see media brands try to bring in revenue in other ways, offering more subscription-based services where ads are cut out of the mix. Facebook, Instagram and TikTok are all reportedly planning to bring in ad-free subscription tiers and Elon is even debating whether to make X a subscription-only service altogether. These kinds of approaches will help with revenue diversification and could also be useful in response to new EU digital privacy regulations due in 2024, which will have an effect on how these companies both collect and utilise people's data.

Green Media

Whilst we are certainly not there yet, sustainability is higher on the marketing agenda and now a common concern for both agencies and brands. The pressure will increase further with new EU social and environmental reporting rules coming into place from 2024, which will put pressure on large companies to operate with transparency and clarity on the social and environmental causes they choose to support in their advertising. Expect the sustainability of production to continue to come under scrutiny too. Across the adtech landscape, we are seeing the development of more sophisticated technologies to support sustainability throughout digital media. Carbon calculators, and measurement and optimisation tools continue to improve. Good Loop have a simple dashboard breaking down how much carbon is emitted from campaign impressions and Xaxis have started to integrate modelling and measurement to determine emission reductions, with more advancements to come in 2024.

Video Eats the World

Video continues to dominate with the TV market still undergoing rapid transformation. Election coverage and Euro 2024 will help linear TV viewing, but once again, all the buzz will be in the streaming space as more change is on the cards. As of February 2024, the UK AV ecosystem will look very different with Amazon Prime joining Disney and Netflix in introducing ads and hoping to disrupt the existing landscape that is dominated by the three main commercial broadcasters: ITV, Channel4 and Sky. As streaming services continue to increase their ad-free subscription prices it is certainly becoming more expensive for viewers to avoid advertising in an already busy CTV landscape, which will only get busier. We have recently seen the UK's leading broadcasters announce a new free streaming service called Freely, launching in 2024 too. For all the opportunity in this space, the need for cross-platform measurement will be even higher on the agenda than ever before.

Destination Data

This year, our research shows people are doing a little more personally to protect their own data, such as using two-factor identification or clearing their cache or cookies. However, it is still government and companies that are expected to take more responsibility in the protection of people's data. Cue 2024, which will be quite a big year for data privacy, with third-party cookies finally on their way out and a regulatory rollercoaster on the cards. A host of EU legislation is in the process of being introduced and the UK is considering a revision of GDPR, with a new data bill currently in development. The big tech company's use of data will be scrutinised more thoroughly, and regulation around AI systems is also on the agenda. As it hits the limelight, the topic of data privacy will certainly be brought front of mind again with consumers.

Proximity 2.0

The use of location data and geomapping will open up even more opportunities for advertisers in 2024, as we move away from using individual customer information and towards more contextual marketing approaches. (See our trend *Up Close, Not Personal*.) Think travel patterns, high street footfall, the rhythm of communities. In 2024, location will be about more than just proximity, it will be a proxy for mindset. Also, location data will be a fundamental data signal to use in combination with others when building, testing and refining cookie-less marketing solutions. It's a common currency for multiple data sets, enables a rich picture of people's behaviour, and allows for holistic, cross-channel activation. Expect to see media brands bolster their addressability and location-based targeting offerings. New features in their products will aid this – social media brands, for example, continue to add more consumer-facing proximity features into their platforms, with 'nearby' feeds, maps and local content.

Body Talks

As we move away from using people's individual and personal data for advertising purposes and with data privacy rising up the agenda, the potential for using people's physical data (e.g. health and fitness data) seems further away than ever. And perhaps it should be, with only 20% saying they are comfortable sharing this type of data. Ethical debates rage on. With AI and new technologies progressing rapidly, we will be capturing more of these measures than ever – think eye tracking, facial recognition and movement. More AI tools will also be available to analyse multiple data sets, helping us to determine and predict emotional mindsets and need states more accurately too. It's an area to watch no doubt, with huge potential, but more regulation is on its way in 2024. Grey areas need ironing out and boundaries determining with this trend.

MINDSHARE

Trends within
this theme

Retail Media

Brand New World

Cashless Society

Shoppable Media

Automatic for the People

Changing commerce behaviours

Changing commerce behaviours

How are our other trends doing?



Brand New World

Although ecommerce growth has slowed since the pandemic, it continues to thrive, and brands continue to look for new ways to market. Marketplace growth has also slowed, but brands and retailers continue to build their own marketplaces and expand their own retail media offerings. Amazon remains dominant, now accounting for 20% of all UK online spend, but they are rethinking store formats and commerce offerings. They face new threats, such as TikTok Shop, which could start to eat into their dominance, but recent commerce deals with social platforms could level the playing field. Keep an eye on generative AI too, which is set to transform experiences on all kinds of marketplaces. In the D2C (direct to consumer) space, digitally native brands continue to decline, with cost being the prohibitive factor, and established brands now have the stronghold.

Cashless Society

Seamless and integrated digital payment experiences continue to fuel the journey to a cashless society. Over half of the population continue to say they are 'uncomfortable with society going completely cashless', but on the other hand, the temptation of convenience is too good to turn down. Ecommerce continues to grow, with social commerce now also starting to make its mark. In 2024, with the cost of living crisis still a factor, BNPL (buy now pay later) services will continue to thrive. Companies will also start to offer more of their services via micropayments, where people only pay for what they use, as an alternative to subscriptions services. Acceptance of cryptocurrency is set to increase and central banks are exploring the concept of digital national currencies. The payment ambitions of companies such as Elon Musk's X should also be watched closely. In-car payment innovations continue to gain momentum and AI will fuel more biometric payment options.

Shoppable Media

In the UK, we saw progress in the shoppable media space slow over the last year, with some platforms even decelerating their social commerce efforts in particular. However, now it's full steam ahead again, prompted by the launch of TikTok Shop and recent Amazon commerce deals with Meta, Snap and Pinterest. It has never been in doubt that social platforms have a big role to play within the commerce journey – #AsSeenOnTikTok and #TikTokMadeMeBuyIt have over 29 billion views, for example. But, it is now about figuring out the most effective integrated shopping formats and establishing more trust with consumers to purchase from these sites. A renewed focus on user-generated content (UGC) and its integration into the wider media plan could be a big answer to the latter (see our trend *Significant Strangers*). In other areas, it's still early days for formats like shoppable TV, but progress is being made with major broadcasters and brands experimenting.

Retail Media

Retail media has certainly fulfilled its promise of being one of the fastest growing ad channels, and this is set to continue. More brands, including Lidl, have entered the retail media space and more non-grocery brands, such as digital banking brand Revolut, continue to experiment as well. Travel could well be a category to watch in 2024 too. Despite its rapid growth of retail media, it is still early days and advertisers continue to struggle with consistent standards and measurement across the networks available – expect to see more initiatives tackle this. Retail media continues to evolve into more of a full-funnel proposition and the development of more in-store offerings is starting to help facilitate this. Sainsbury's have just partnered with Clear Channel, with plans to extend their connected digital screens network to over 800 screens for example. Look out for more formats coming to an aisle near you soon.

Automatic for the People

Recent progress and investment in AI, will give automated customer-facing solutions a boost over the next few years. Developments in generative AI, in particular, will make chatbots and virtual assistants a much improved and viable option for customer service. Automation for optimising back-end operations will also thrive. With prices reducing, robotics are becoming more accessible and drone deliveries are starting to make progress, especially for categories like pharmacy. Automation in 2024 remains about making people's lives easier and enhancing human efforts rather than replacing them. Our research has seen a big drop in people saying 'it's easier to deal with a machine than a real person' compared to last year. It's no surprise then, that retailers, including Amazon, are rethinking self-checkout and cashier-less 'just walk out' store formats. Not only are they proving problematic for customers, but they are also expensive to get set up and are losing companies money.

MINDSHARE

Trends within
this theme

Significant Strangers

Real or Replica?

Social Unrest

Over to You

Game On

Changing spheres of influence and community



Trend 3

Significant Strangers

User-generated content has evolved. It's playing a bigger role, both within the purchase decision and the media plan

The sphere of influence has changed entirely. People are seeking authenticity and looking to people they don't necessarily know to provide it. Word-of-mouth and recommendations have always been influential, but now UGC (including reviews and content from influencers and creators) is gaining more traction, as it becomes increasingly prolific and sophisticated in nature. And brands are beginning to treat this type of content very differently.

Winning people's trust is more complicated than ever. Consumers have become savvier as to who they listen to, and how they stay informed. Once trusted, though, the views of 'significant strangers' will often prove more influential in clinching a sale than what brands are saying themselves. Welcome to

a new era of convergence between brands and real people within the communication journey. Take influencer marketing, for example, which has 'grown up' somewhat, with both consumers and brands feeling very differently about it compared to just a few years ago. Now, it's a much more extensive and sophisticated proposition, connecting with people at all stages of the purchase journey. Brands are not just using it as a vehicle for PR, but integrating it into their wider media plans, too, so its impact can be leveraged and amplified across both brand and performance activity. Similarly, reviews are being further integrated into ads and media plans. These types of sources have, in fact, evolved into legitimate paid media behaviours of their own and should be treated as part of the holistic media plan.

Significant Strangers

01

Five areas to watch

Crowdsourcing for legitimacy

People are looking for organic, authentic ways to validate their purchase decisions, and that often lives in UGC. They shop around on review sites and social media to get unbiased views on products from a variety of voices. Interestingly, younger people tend to value TikTok and YouTube videos more than recommendations from people they know, as the sheer number of reviews, even from strangers, equals greater legitimacy. The introduction of the TikTok search bar plays into this.

Local community sites, like Nextdoor, are positioned as authentic voices of 'strangers', with no hidden agendas. More open-source platforms like TrustATrader, Which?, MoneySavingExpert, eBay seller reviews, and YouTube reviews are also mentioned as trustworthy sources, as are embedded reviews in sites of retailers like ASOS. It's seen as even more genuine when companies join the conversation and respond to reviews. Review content

is becoming integrated into media plans, with ads incorporating reviews proving more trusted by consumers. According to Trustpilot, 'ads that feature others have been wielding four times higher clicks and a 50% drop in cost per click compared to traditional ad formats.'

Generative AI could have a big impact on reviews, too, and should be watched in 2024. On one hand, the technology could help people digest the vast amount of content available. Amazon have rolled out generative AI review technology amalgamating thousands of product reviews into one succinct paragraph. On the other hand, generative AI could be used to add fake reviews. Companies are already counteracting this, with Amazon, Booking.com, Trustpilot, Tripadvisor and others coming together in 'The Coalition for Trusted Reviews' to combat fake AI-generated reviews.



'With TikTok, there's a wider pool of people that you can hear from. So you've got more opinions from more people, from an unbiased standpoint.'

Female respondent, early tech adopter, under 35

Significant Strangers

02

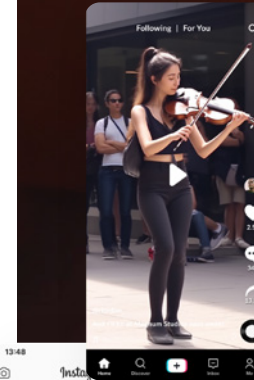
Five areas to watch

Creativity moves front and centre

As influencer marketing has matured and influencer content has diversified, people's attitudes towards them have changed. This has been buoyed to some extent by the rise of the 'creator' economy. Our research shows creators are seen as more imaginative than influencers, with brand promotion more organic and not always paid for (even when it is!). Social media platforms continue to incentivise creators to use them with financial rewards, incubator programmes, and guidance. Platforms are also arming creators with new AI tools to help with tasks like video and music editing (see our *Generative AI* trend for more).

Influencing is now a legitimate academic vocation – Irish university SETU is the first to launch an influencing degree. Whether influencers or creators, individuals need to be multi-skilled. As for media channels themselves, it's not just about content creation and production, but about

elements such as community management and even distribution and measurement. Creators also need to understand their platforms and audiences, inside and out. What it means to be a Twitch gamer, a Reddit threader or someone on Discord is very different being a TikTok creator. Platform-native creative content is defined by its purpose and use, and often resonates when it's unpolished, fresh and relatable. It's worlds away from the glossy photoshoots that were prolific when Insta influencers first reigned supreme. As creative boundaries expand, brands are relinquishing more creative control and moving away from polished ads with strict brand guidelines. The benefits are huge if they get it right, with creator-driven content outperforming brand content across the board. A study from Goat and Mindshare shows content from influencer handles drives 32% higher ad recall and 78% higher action intent versus running brand handles.



Significant Strangers

03

Five areas to watch

The isms (realism and specialisms) rule

Influencers and creators have grown in stature alongside the growth of social media. But simultaneously, people have become savvier about how they work and have higher expectations of their output. People are losing faith in macro celebrity-led endorsement. *Love Island* contestants with the intent of getting an influencer deal are instantly called out. Some macro influencers can be seen as juggling vast ranges of competing products, taking on multiple brand deals within categories, churning out paid partnerships, and consequently losing credibility in their recommendations, while creating a sea of sameness.

However, people are now aware that the influencer community is vast and varied, and more than just high-profile celebrity endorsements. More respected are nano influencers creating UGC around specialised areas, and experts in a specific industry. Their followings may be smaller, but it's these authentic, expert voices that

people are gravitating towards. Realism is leading to trends like 'de-influencing' emerging, where influencers tell followers why they shouldn't buy a product.

When it comes to brand endorsement, trust is largely dependent on the type of creator, the platform and authenticity of the brand content they are promoting. Category is also key. Finance, for example, demands influencer credibility.

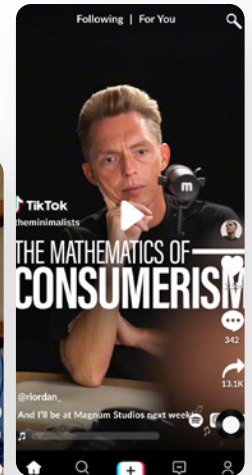
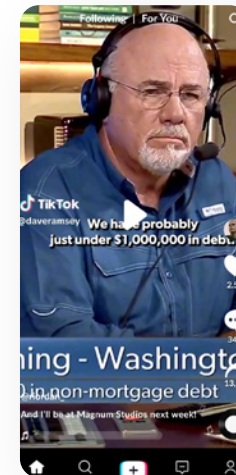
People like to feel part of something, not just sold to. So, experts or specialists should not just share information or tips with their community, but interact with them, too. Tools like Instagram's Broadcast Channels enable people to participate directly in creator channels. It's important for brands to forge relationships with these individuals, as they're fast becoming the most trusted channels regarding decisions to purchase.

'I follow fitness and nutritional experts and parenting guides, but they won't be just your everyday person. They'll be someone who's studied to get there, or worked hard, following their own tips. They're doing it because they've got information to share, not just because they're getting paid.'

Female respondent, mainstream tech adopter, under 35

'There are influencers that I follow who are real experts in their field'

22% in 2021 **26%** in 2024

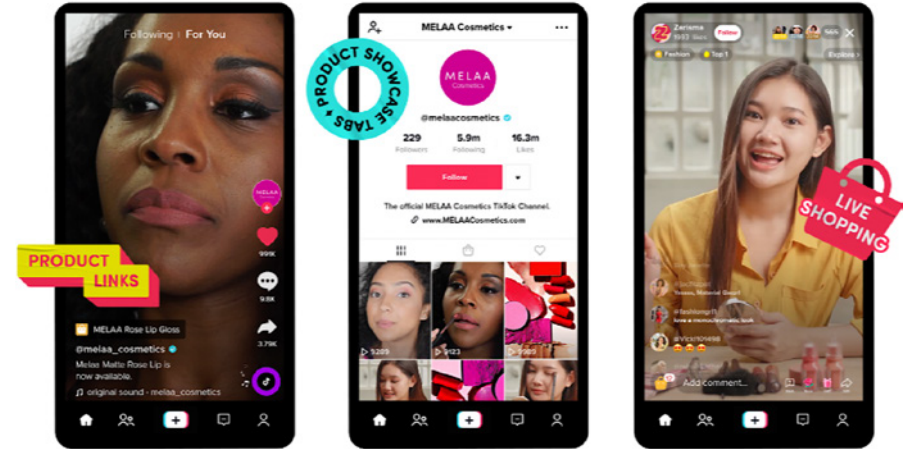


Significant Strangers

04

Five areas to watch

Influencers and creators redefine commerce



Shopping via social is increasing, while platforms focus on creating a shopper journey where you stay with their platform. The role of influencers and creators looks set to expand with TikTok's own marketplace, TikTok Shop, where brands and creators can sell via video and earn commission. Products might even be stocked and shipped by TikTok as they become a discovery engine, social sales platform, and ecommerce storefront, all in one.

A few years ago, in our *Shoppable Media* trend, consumers were wary of buying things from social, and concerns remain. Now, 61% say they're worried about scams (reduced from 65% two years ago). Plus, with an influencer or creator promoting

products, there's ambiguity as to who you're buying from, who's profiteering, and who's responsible for shipping and aftercare.

While supporting creative entrepreneurs is appealing, there's also a call for influencer's shops to be verified and have proof of sale. How TikTok Shop plays out alongside Amazon will be interesting to watch. Amazon have introduced a TikTok-like feed and features like 'consult a friend', but are looking outside their own ecosystem for engagement. Deals with Snap, Meta and Pinterest have integrated Amazon into their platforms. TikTok Shop is already facing issues with counterfeiting and managing products, plus some users feel it's disrupting the TikTok experience.

When creators take a percentage of sales, as seen in markets like China, their role in the consumer journey is redefined. They act as a one-stop shop for brands to build awareness and sales. The potential for passive purchase is also increased – social media scrolling leading to unplanned purchase. Over ten years, we've watched people move from 'going shopping' to near constant 'graze shopping'. Trends like nocturnal spending have emerged, where women, in particular, shop between midnight and 6am, with a 3–4am peak. Influencers will be more present in these passive moments.

Have bought something at the recommendation of an influencer or creator

25%

51%

Have bought an item straight from a social media platform

29%

49%

Have bought via affiliate links on sites like Amazon

38%

48%

— All adults

— Under 35s



Significant Strangers

05

Five areas to watch

Influencers and creators as a media channel



Influencer content has always been associated with reaching people in the consideration phase (although, arguably, they're about acquisition and sales). But now they're activated at all points from awareness to acquisition, with an influence on every channel and part of the media plan. We already see user-generated, and influencer, content used ATL, particularly in fashion and beauty, with the likes of Garnier using influencers in their TVCs.

We're also seeing performance-driven tactics, with UGC harvested for reviews and embedded into retailer websites to drive consideration and conversion. This is making influencer content work much harder, alongside paid media, which can also amplify content. That's why you'll see an increase in influencer marketing treated as part of a media plan. It will also start being held to account the same as any media activity, with expectations of delivering tangible sales or acquisitions (within reason, as attribution is always tricky).

GroupM's influencer agency The Goat Agency specialises in end-to-end data-led influencer marketing campaigns grounded in performance and measurement. Campaigns are managed via a dashboard optimised towards performance in real time, with ROAS and CPAs guaranteed for clients. Activity can be tracked and integrated into an analytics and measurement framework to understand its impact with wider digital campaign plans. They can also facilitate cross-channel influencer integration, like their partnership with Amazon introducing influencer-led shoppable content.

It will be interesting for brands to explore relationships with those credible specialists and smaller scale influencers talked about earlier. Working with them on a paid basis, using media KPIs and dashboards will help brands understand their growth trajectory and engagement rates to drive greater consideration and trust. We'll see brands trying to understand the right internal structures, strategy and balance of investment to hit brand objectives within the media plan. Testing and experimentation will be crucial.

Five steps to getting future-fit

01

Harness new ad formats that incorporate reviews.

Explore how to leverage your own loyalty data or first-party data into media formats in a way that can build greater authenticity and trust.

03

Lean into the isms (realism and specialisms).

Explore the use of specialist professionals in legitimising a sale, leveraging relevant skillsets of others to drive greater trust. Spend time reviewing sentiment and interactions with specialists' branded posts to help map out their role in the campaign ecosystem.

02

Audit the performance of existing influencer buys.

Analysing existing performance against different metrics across the consumer journey will be a useful exercise to see whether UGC in its various guises can be utilised differently throughout the funnel, from reach, to sessions, dwell time, clicks, and even sales.

04

Prep for non-stop shopping.

Develop a distinct approach that taps into more passive paths to purchase by giving creators and influencers alike the skills to drive a sale on your behalf. Whether it's TikTok Shop, new Amazon influencer shoppable formats, or simply affiliate links, be sure to upskill so you can test, track and audit on every transaction.

05

Ground everything in measurement.

Develop a buying approach that is as accountable as other parts of the media plan. By managing via a dashboard, you'll be able to understand the impact of integrated influencer activity in relation to the wider media plan. This can be optimised towards performance in real time, with ROAS and CPAs guaranteed.

Trend 4

Real or Replica?

The lines between what's real and what's fake are becoming blurred

We're returning to the *Real or Replica* theme for the first time since it was featured in our report in 2019. Five years ago, we talked about the need to combat misinformation and fake news while also considering the dynamic of new technologies and what this means for trust. Voice assistants had just gained traction, while virtual influencers and deepfakes were starting to hit the headlines. Perhaps we discussed things ahead of their time because, in some respects, not much has moved on, with the same questions arising. However, in other respects, everything has changed, and there are new dynamics to consider.

AI has advanced at an unprecedented pace, resulting in the lines between reality and fiction becoming ever more indistinct.

It's providing us with new ways to represent and express ourselves online, but is also prompting a surge in high-quality deepfake content. (Deepfakes are videos, images or audio content that have been manipulated using AI to make it look like someone is doing or saying something they never did in reality.) From exciting creative possibilities to ethical dilemmas surrounding consent and identity, we're witnessing a transformation in the way media is produced and consumed. And it is not as far away as you might believe. Businesses, brands and individuals must strike a delicate balance between embracing innovation and preserving trust. The future of media is set to be shaped by our collective response to this accelerating trend.



Real or Replica?

01

Five areas to watch

Deepfakes threaten trust in media

Trust in media is in decline. And the way we now consume it isn't helping. News and information come from a mix of sources, with everything from high-end journalism to UGC all sitting alongside each other on social media. It's hard to tell what's real, or where it was sourced from, increasing the potential for dis- and misinformation. And the problem is only set to worsen.

We found 62% of people think deepfake content is going to become more widespread. We've seen an increase in high-quality deepfake imagery and videos. That includes fun content like the Pope wearing a Balenciaga puffer jacket, Jim Carrey starring in *The Shining* and ITV's *Deepfake Neighbour Wars*. But concern about the spread of content that has more serious consequences is rising. We've seen Martin Lewis endorsing fake investments, and Keir Starmer insulting aides, and there

are concerns about deceptive AI-generated political ads in the run-up to elections happening all around the world in 2024.

So, how do we avoid the adoption of automatic distrust of all media? Increasing pressure is being put on tech companies to identify fake content. Google have announced an unremovable watermark and labelling system for generative AI images, while Adobe have launched a Content Credentials icon embedded in the metadata of content created using their software. While these are a step in the right direction, we'll see more initiatives to combat deepfakes. We might also see education on spotting manipulated content, as well as new detection technologies. Additionally, we're likely to see regulations to restore people's trust in what they're hearing and seeing.



62%

of people think deepfake content is going to become more widespread.

HERE'S JOHNNY!

Real or Replica?

02

Five areas to watch

Copyright of me

If GenAI can convincingly replace a person's likeness or voice, how do we know consent was given? As technology becomes more sophisticated, the boundaries of identity ownership are being tested, with over three-quarters of people saying they're concerned.

Consent is a concern for everyone, but particularly for well-known personalities, as shown by this year's actors' strike. It's an issue for musicians with their voice too, evidenced by the AI Drake/The Weeknd track 'Heart on my sleeve'. It was produced by the anonymous 'Ghostwriter' and, based on 600,000 listens and 15 million TikTok views, looked set to be a hit until DSPs removed it, under pressure from Universal Music.

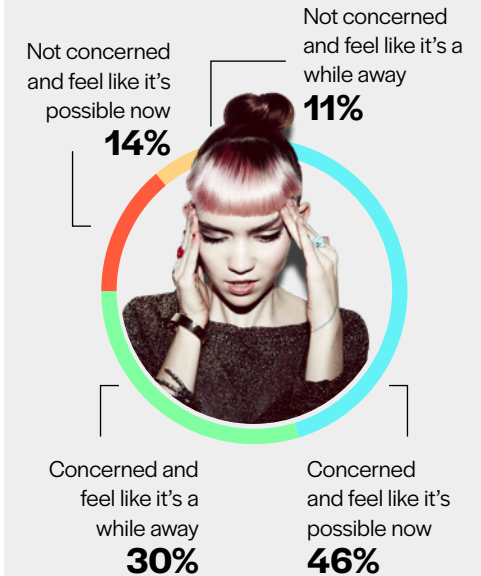
While some artists are fighting for AI regulation, others are embracing the opportunities. Grimes, for example, issued a statement 'I'll split 50% royalties on any successful AI-generated song that uses

my voice', launching Elf Tech with the tools to do just that. Michael Douglas has said he's considering licensing his name and likeness: 'It's only matter of time before you'll be able to recreate any dead person at any age with the voice and the mannerisms, so I want to have some control.' Other celebrities, including Kendall Jenner, Paris Hilton, Snoop Dog and Mr Beast, have reportedly been paid as much as \$5 million each by Meta, to use their face and voice in chatbots on Meta's social platforms.

In coming years, IP lawyers will be busy tackling AI misuse and developing new laws. In the meantime, businesses, brands and individuals will have to find a way to balance innovation and consent. As will.i.am said to Mark Read at Cannes Lions, 'We need to ensure that every single person's likeness and essence is owned by them. Because it's a human right.'



How concerned are you about AI recreating your likeness and how far away does it feel?



Real or Replica?

03

Five areas to watch

Next level digital identities



Most of us already have different digital personas across social media, work, home dating, and this behaviour is only set to increase. Futurist Tracy Follows says, 'We can no longer try to represent the same version of our "self to everyone we meet. Those representations can, and should, be context dependent. And, in a digital world they can be.'

Despite this, there's still a feeling that these digital personas don't reflect our personality in real life. As one respondent put it, 'Digital

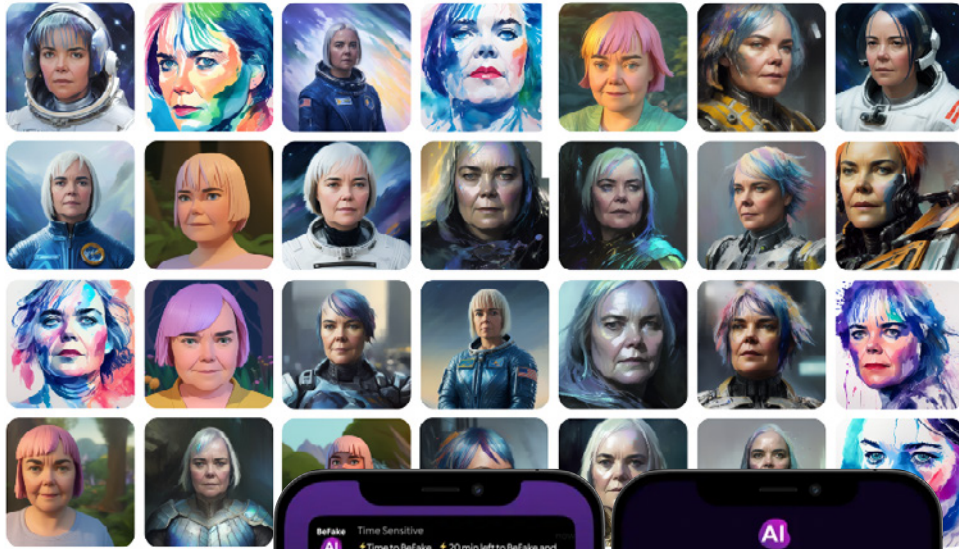
data doesn't really pick up on your emotions or mannerisms, so that part of things feels like it's missing.' But with the advent of more AI-based tools, our digital selves will become more capable of expressing emotions. Microsoft have unveiled 3D animated avatars in Microsoft Teams, allowing users to express themselves during meetings without being on camera. And after being mocked for Meta's original VR avatars, Mark Zuckerberg recently unveiled new photorealistic versions that will add a sense of emotion and presence to his 'metaverse' vision.

Celebrities that want to develop their digital identity can already do this with help from companies like Dimension and HyperReal – creating avatars so lifelike they're known as 'digital twins'. Supermodel Eva Herzigová was one of the first to create her MetaHuman self with Dimension Studio, describing it as a 'mother-like experience'. Digital Eva is now available for bookings: "My MetaHuman gets to go off to work, to be photographed and styled by the most incredible creative minds. Today I can be in London, Paris, Milan, and New York, all whilst at home cooking dinner with my children."

Real or Replica?

04 Five areas to watch

Embracing the fake



The application of filters, lenses and photoshop has been ongoing for years. So why not extend this 'creative manipulation' further to our online selves? When asked why he liked using avatars, one of our respondents said, 'I can change the way I look, I can express different parts of my identity more easily, because I don't have to make real-life actual physical changes. I can also be an extrovert online, even if I am an introvert in real life.'

Increasingly, we're seeing a desire to explore digital identity in more creative ways, enabled by new tools like Snap Dreams, and the not-so-inventively named AI Avatars from TikTok. Both allow you to create fantastical characters and landscapes, to express a side of your personality not possible in real life.

There has always been an acceptance that social media doesn't reflect reality.

38% agree that 'Everything on Instagram is fake to some extent.' So, it's no surprise that the desire to create altered images extended into social media this year when app BeFake entered the market. Unlike BeReal, which asked users to post an unfiltered image once a day, it allows the creation of far from real AI images.

We're engaging with virtual personalities online, too. Virtual influencers are well established and virtual newsreaders are appearing around the world. In China, the popularity of AI streamers has exploded and it's easy to understand why, when they can work continuously and sell more than a billion dollars' worth of goods per night. This trend may not make it to the West, but is interesting nonetheless. On one hand, we're writing about people's desire for authenticity in our trend *Significant Strangers*, on the other, this is playing out.

Real or Replica?

05

Five areas to watch

Fakery extends to advertising

How do you feel about AI being used for the following?

Replicating/recreating actors in films or TV

21% 16%

Writing news articles

22% 16%

Writing TV shows

22% 19%

Writing a book

23% 17%

Creating music

28% 14%

Tailoring the content of TV programmes for me (e.g. choose my own ending to a show)

25% 17%

Creating art

26% 18%

Tailoring the content of ads for me

27% 17%

Creating an advert

32% 17%

I like the idea of it and it will be popular in the future

I like the idea of it, but it won't catch on

Generative AI is making it possible to produce content that would previously only have been created by humans – TV shows, music, art, news articles. Even AI-generated books are flooding Amazon. Most say they want to know when something is created by AI, though it's not front-of-mind. Expect this to change as we see people feeling duped. AI-created ads are no exception, although it's the area people are least bothered about, with 49% saying they like the idea.

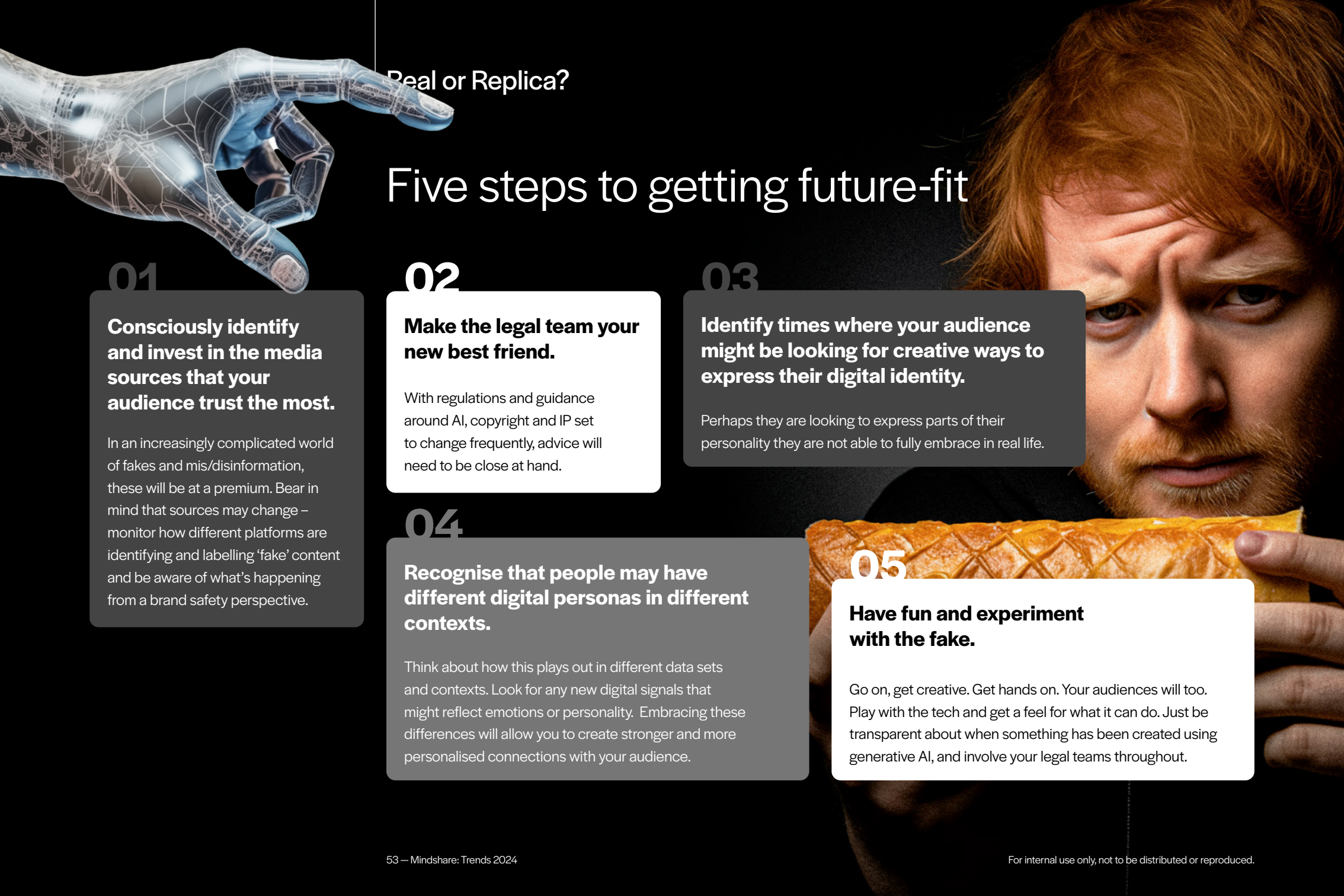
The advertising industry has certainly become a fan of fakery, with deepfakes turning up in TV ads, CGI dominating OOH, and the latest faux-out-of-home, or FOOH trend.

In Brazil, VW made a nostalgic ad with over 50 million views. 'Generations' features singer Maria Rita duetting with her mother, Elis Regina, who died in 1982. In China, Nike created *Little Big Talk* showing China's biggest sports

stars chatting to their younger selves.

The most high-profile FOOH ad was an oversized Maybelline mascara wand brushing huge lashes on a Tube train. The press and TfL believed it was real, and the internet went into meltdown, until it was revealed it never existed, which made people love it more. FOOH has given creatives the tools to create anything they can imagine, like a giant Barbie tower or Jacquemus's traffic-stopping bags.

But, given the mistrust in what we see in media and advertising, should we be cautious? In Brazil, marketing watchdog Conar investigated whether the Regina deepfake constituted an ethical breach and, in the UK, industry journalists have asked whether it's 'a gateway into the world of misleading marketing content'. The public seem less bothered, though, as long as it provides the entertainment factor!



Real or Replica?

Five steps to getting future-fit

01

Consciously identify and invest in the media sources that your audience trust the most.

In an increasingly complicated world of fakes and mis/disinformation, these will be at a premium. Bear in mind that sources may change – monitor how different platforms are identifying and labelling ‘fake’ content and be aware of what’s happening from a brand safety perspective.

02

Make the legal team your new best friend.

With regulations and guidance around AI, copyright and IP set to change frequently, advice will need to be close at hand.

03

Identify times where your audience might be looking for creative ways to express their digital identity.

Perhaps they are looking to express parts of their personality they are not able to fully embrace in real life.

04

Recognise that people may have different digital personas in different contexts.

Think about how this plays out in different data sets and contexts. Look for any new digital signals that might reflect emotions or personality. Embracing these differences will allow you to create stronger and more personalised connections with your audience.

05

Have fun and experiment with the fake.

Go on, get creative. Get hands on. Your audiences will too. Play with the tech and get a feel for what it can do. Just be transparent about when something has been created using generative AI, and involve your legal teams throughout.

How are our other trends doing?

Over to You

Media continues to move further away from passive consumption. Whether it's interacting with others on social platforms about related content they are watching, building worlds within gaming environments or sharing playlists on Spotify, there is a growing need for media experiences to be both interactive and engaging. Fandom continues to thrive (Barbie-mania is a great example!) and participation in online communities goes from strength to strength. We have seen a slight drop in people creating content for social platforms, but no doubt in 2024 this will be boosted by a number of generative AI tools that are set to make content creation more fun and accessible than ever (see our trend *Generative AI*). The creator economy is on an upwards trajectory and UGC will be more valued than ever (see our trend *Significant Strangers*).

Game On

Gaming has continued to go from strength to strength, with brands considering it a mainstream channel for some time now and featuring it regularly on media plans. It is no longer about convincing brands of why they should invest, or dipping toes in to test and learn. Ad opportunities are ever expanding, with more immersive and native formats, greater controls around brand safety, and enhanced measurement and standards being rolled out. This will continue in 2024. Roblox have big plans for example. The IAB predicts that the gaming ad market could more than double to c.£1.84 billion by 2026. Mobile gaming will continue to grow as we see higher quality experiences, more akin to the graphics and gameplay of console games. Microsoft's completed acquisition of Activision Blizzard will see mobile game developer King as one of their most important assets. Gaming subscription services are also on the rise and more gaming activities are moving online. Generative AI will prompt huge changes to the way games are designed and played.

Social Unrest

Social media continues to be at a crossroads, with platforms changing their strategies, introducing new features and trialling new initiatives as they carve out their future direction. We've already seen Twitter morph into X, Instagram adding Threads, and TikTok introducing text-only posts. But also we've seen a backlash to things like Reddit changing the way they work with third-party apps. The fate of any new platform initiative will ultimately be determined by its users. Take the rise of social search, which has come about organically. It's a big area to watch in 2024, as platforms integrate new search features in response. The integration of chatbots will be one way they do this – Meta AI is an assistant coming to WhatsApp, Messenger and Instagram, for example (see our trend *Generative AI* for more). Social platforms (and other digital 'gatekeepers') will face more scrutiny from regulators in 2024 as the DMA comes into force across the EU.



MINDSHARE

Changing uses of tech

Trends within
this theme

Generative AI

Immerse Me

Virtual Insanity?

OM5G

Home Sweet Home

Look Who's Talking

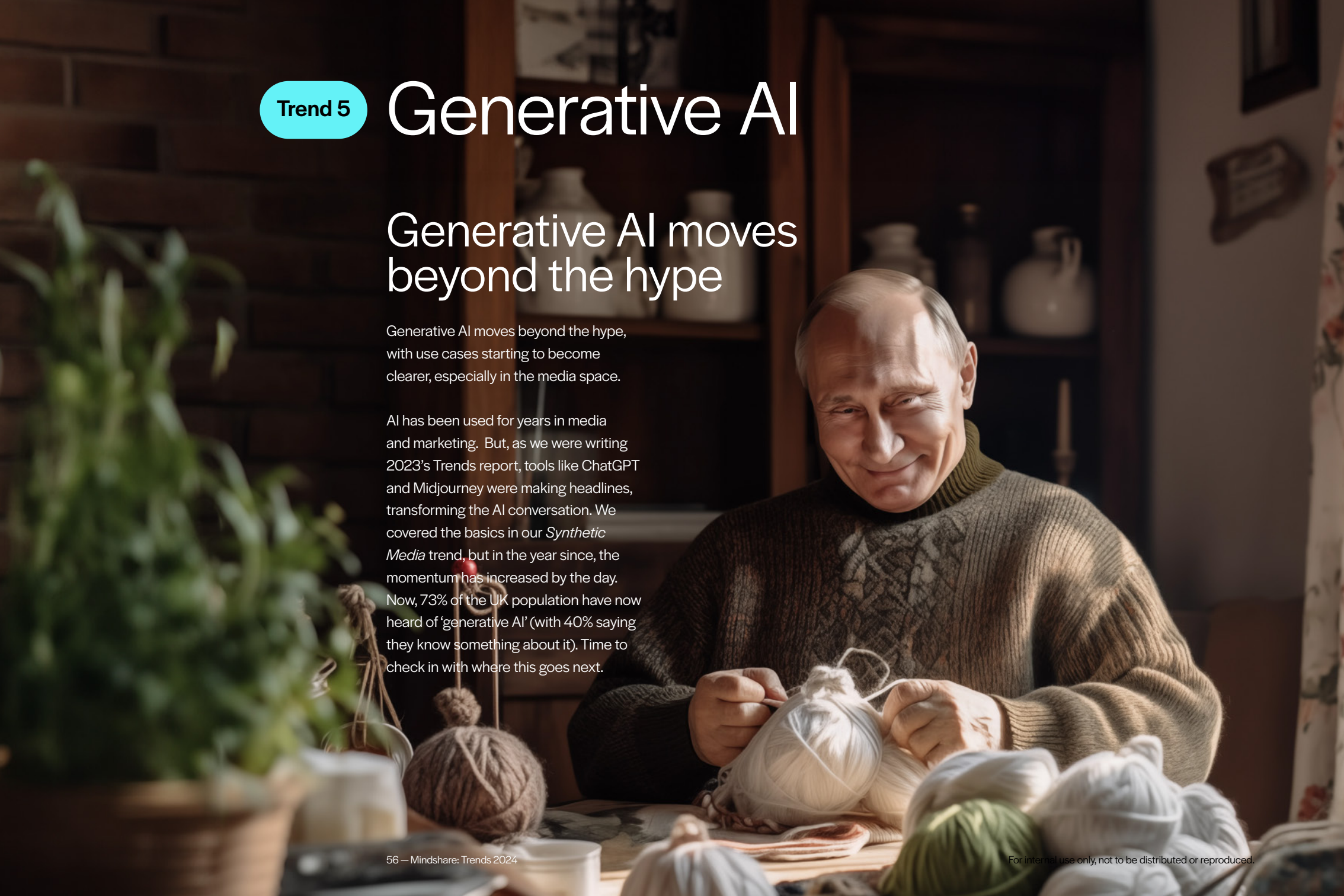
Trend 5

Generative AI

Generative AI moves beyond the hype

Generative AI moves beyond the hype, with use cases starting to become clearer, especially in the media space.

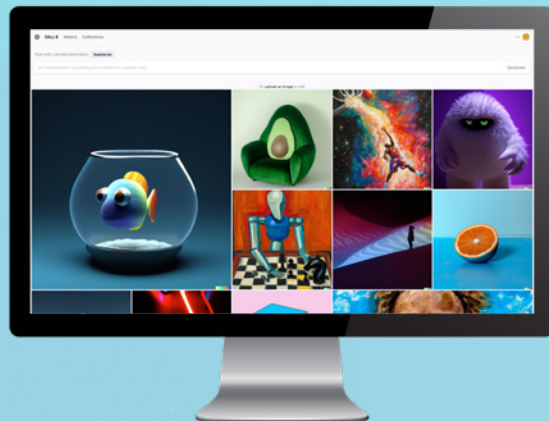
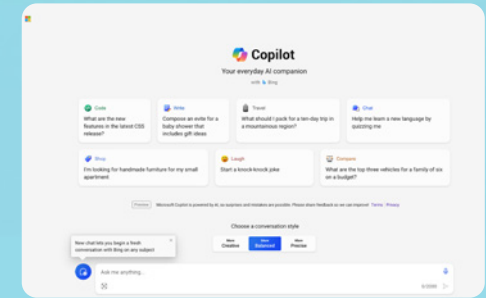
AI has been used for years in media and marketing. But, as we were writing 2023's Trends report, tools like ChatGPT and Midjourney were making headlines, transforming the AI conversation. We covered the basics in our *Synthetic Media* trend, but in the year since, the momentum has increased by the day. Now, 73% of the UK population have now heard of 'generative AI' (with 40% saying they know something about it). Time to check in with where this goes next.



Generative AI

Last year, we were talking tools, but the real magic was in the technology behind them – the foundation models, the large language models (LLMs). What they and their associated tools offer is general purpose technology. It can answer any question and create anything we desire. And there's the problem – we're not 100% sure what to ask it or what to do with it, and, even though applications have popped up everywhere, it's still very much trial and error. However, a host of developments

and integrations are on their way, and 2024 looks to be the year people start getting to grips with using the technology in impactful ways across every industry. That includes media and marketing, which will be our focus. A word of caution – progress will continue to be rapid, and some of what we're writing about now will change fast, so keep your eye on developments! It's going to be a rollercoaster ride, with tech companies vying for supremacy and regulators poised. Let's dig in.



Generative AI

01

Five areas to watch

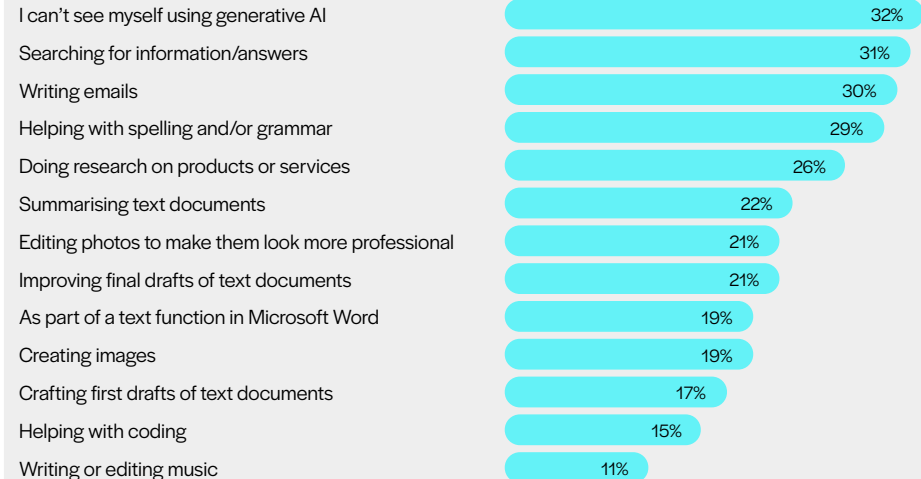
The emergence of clearer use cases for generative AI

Currently, use of generative AI in the UK is limited, with 23% having used text generation tools like ChatGPT and 10% having tried image generation tools. And this is more for personal use than for work. Understandably, our vision for these tools is currently limited to practical tasks we are already doing, but soon we'll find uses for them we haven't even considered yet. We could even see more multifunctional devices, like Humane, which is a pin powered by AI, that aims to replace the smartphone and redefine daily interactions entirely.

It's early days, but use cases for generative AI will start to become clearer in 2024, especially for specific industries. We're already seeing new developments and integrations. Models are now able to browse

the web, making outputs more up to date (although the real-time element comes with its challenges). Interfaces are also becoming multidimensional. ChatGPT can now hear and speak, and Amazon are working on an LLM custom-built for voice interaction, so that talking to Alexa will be as natural as talking to another human. Tools are set to become much more cross-functional, too. Image generation tool DALL-E 3 has been integrated into ChatGPT, as well as some Microsoft services. Both Microsoft and Google have a vision to embed generative AI across their entire offering. Already, BARD has been integrated into Workspace and Copilot integrated into Office 365 to help write emails and letters, for example. Expect the conversation to shift beyond text and image too, as advances in video creation and music generation continue.

How can you see yourself using generative AI in the future?



Generative AI

02

Five areas to watch

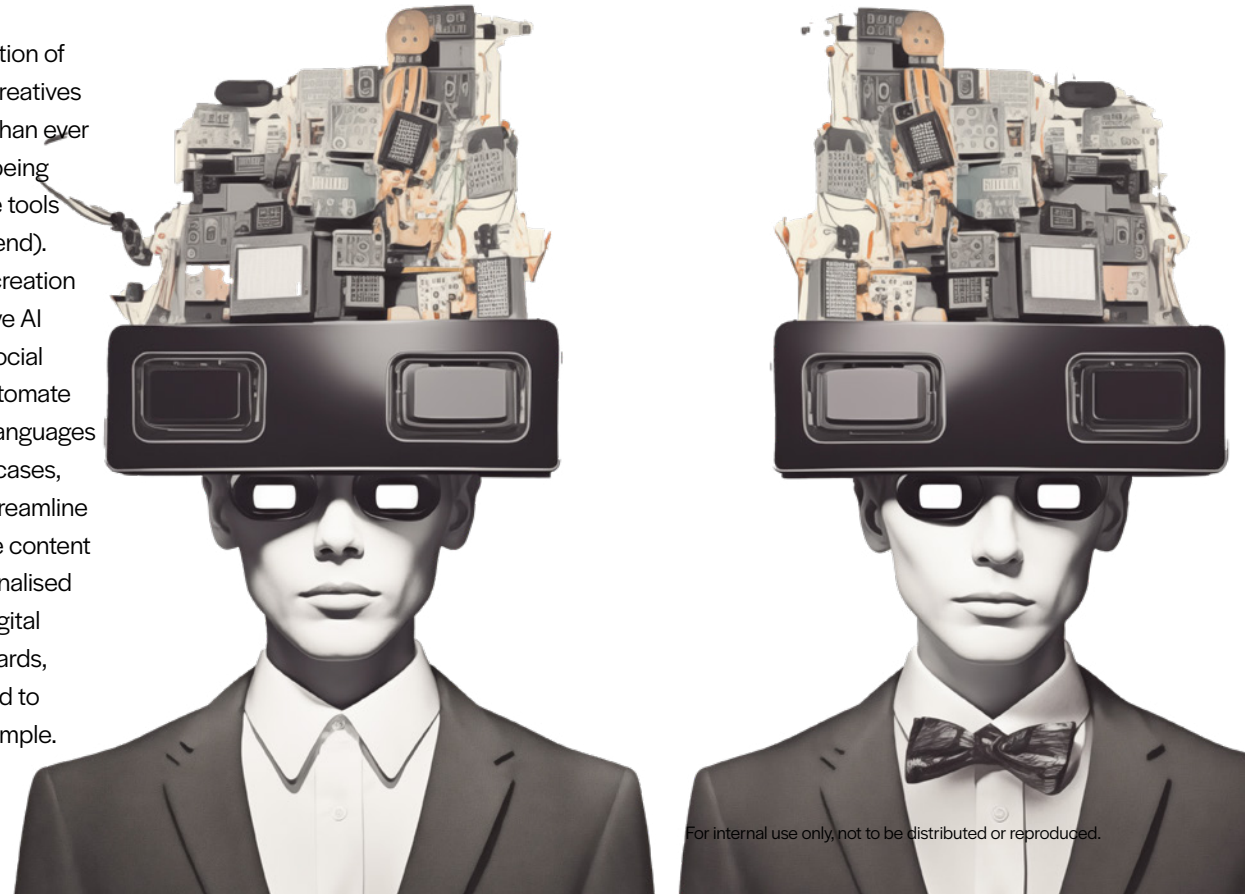
Generative AI and media

So, what can we expect media agencies to be using generative AI for in 2024?

There are four areas where media will benefit from the use of generative AI. These are planning, content, activation and measurement. A quick caveat though – for higher-level activities, it is clear that it's at its best when tech and human expertise are working in harmony. It's more about enhancing than replacing tasks.

The technology is particularly useful at the early stages of client work, helping to uncover insights or understand audiences. Expect more AI tools for data visualisation and extracting audience insights from big data sets. Yes, AI focus groups have a place, and no, we aren't expecting them to replace in-person interactions! New possibilities

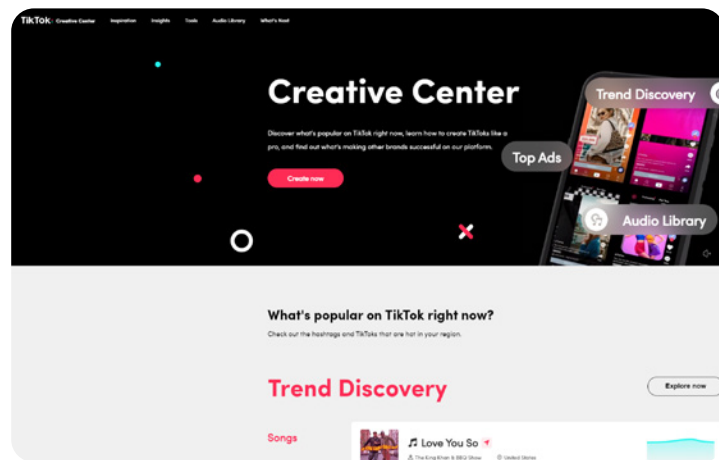
are also opened up for personalisation of content and creative messaging. Creatives will work more closely with media than ever before, with creative optimisation being woven into campaign performance tools (see our *Up Close, Not Personal* trend). Faster and more efficient content creation will also be a focus. Think generative AI assisting with content for SEO or social posts. It's already being used to automate copy and translate it into multiple languages for ecommerce sites, though in all cases, the tech is used to enhance and streamline these processes rather than create content from scratch. More real-time personalised content might be integrated into digital product placement or digital billboards, where messaging could be adapted to reflect the news of that day, for example.



03

Five areas to watch

Rocket fuel for the creator economy



The growth of the creator economy is certainly not slowing (see our trend *Significant Strangers*). Goldman Sachs expect their value to nearly double over the next five years. AI is set not only to fuel this growth, but to shape its direction, with new tools and methodologies both enhancing creator output and opening content creation to a wider pool of people. As tools improve, AI will enable

more people to create studio-level quality content. An AI-created movie or ad might not be far off, despite AI's current struggles with video creation. Fable Studios not only created a completely AI-generated episode of *South Park* (it didn't get rave reviews), but also a metaverse called the 'simulation' where the characters live and their storylines are autonomously created, feeding into more episodes.

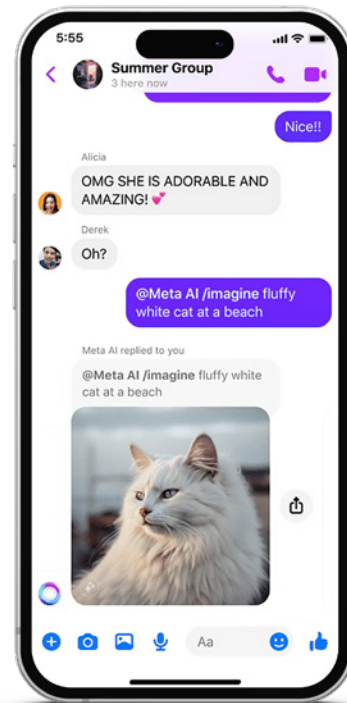
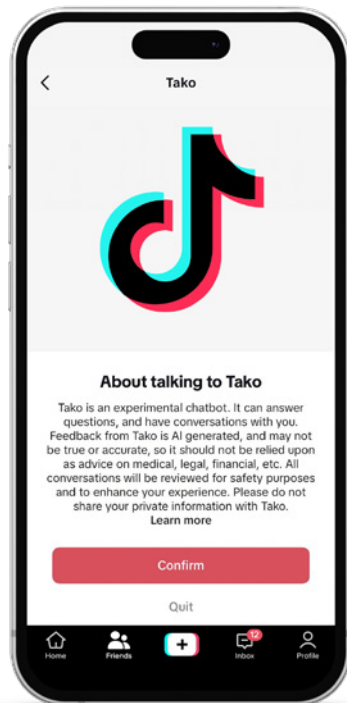
Some content platforms, like TikTok, are taking precautions to limit entirely AI-generated content, but there's a balance to be had. TikTok, Meta and YouTube have introduced a suite of AI tools that aid creators in ways that include informing content creation, honing optimisation and reducing production times, like YouTube's AI Insights feature or their Dream Screen tool. TikTok have also introduced an

AI-powered virtual assistant for creators, which helps with functions like music selection, translation and video editing. These tools are available not only to creators, but to brands too, which might see more parts of the creation process brought in-house. All exciting stuff, but we should make sure we don't flood people with content and dilute viewership.

Generative AI

04 Five areas to watch

Transforming the search landscape... and beyond



'Searching for information' is the top thing people can imagine themselves using generative AI for. It's also where generative AI will likely have most impact on media, with a knock-on effect elsewhere. Google are taking a two-pronged approach to generative search with Search Generative Experience (SGE – a new UX/UI for google.com) and BARD (Google's AI-powered chatbot, which can be embedded in multiple products). Companies like Microsoft are also developing generative search offerings, trying to eat into Google's market share. Traditional search is not going anywhere yet, but more conversational search is inbound, and both paid and organic search will see big changes. Google are also trying to integrate images more readily into answers. For users, all of this promises better product discovery and

finding what they need more effectively. But it has big implications. What happens to directional web traffic? Testing on integrating ads into answers and how to retain web traffic has already begun. The loss of directional traffic from social is also an elephant in the room. Social platforms are integrating chatbots that can answer anything – Snap have myAI and TikTok are testing Tako. Meta AI is an assistant coming to WhatsApp, Messenger and Instagram. Want some holiday advice? Ask Meta AI or one of the planned AI celebrity characters (see our trend *Real or Replica?*). Amazon also plan to incorporate an AI chatbot to improve search capabilities. Basically, expect anything with a search bar to run from an LLM in future. Big changes are afoot for search, and the entire ad ecosystem as we know it.

Generative AI

05

Five areas to watch

Big tech, big plans

A generative AI announcement arrives every week from the big tech companies. They all have a foundational model and plans to integrate it into products. Initially, Google and Microsoft had a strong lead, but others are now in the game. Apple are testing their own LLM and chatbot, with plans to revamp Siri with AI features. Elon's new company xAI have an LLM they're planning to integrate into Twitter/X. Amazon have multiple initiatives, but their real plans lie in enabling companies building with generative AI to create any product using any model, within their AWS infrastructure. To fuel this they are investing in AI companies like Anthropic, but Google are, too. We are seeing parallel strategies like this from the big tech companies – investing in or collaborating with competitors while continuing to develop their own projects. Cue Microsoft and OpenAI. Everyone is hedging their bets and working on multiple plays. Google

have PALM2, BARD and SGE. And Google DeepMind continue to progress on Gemini (their next-gen multimodal AI, speculated to be the most powerful AI ever).

Meta have another approach with their open-source model Llama 2. Developers can use Meta's code (via collaborative platforms like Hugging Face) to improve on each other's work. Developments are moving at breakneck speed, despite calls from the industry to slow down, and regulators are being hampered by the EU AI act still being a work in progress.

With the pace of change and lots of stakeholder agreement needed, it is a long time coming. In the UK, 72% agree that 'there needs to be more regulation around AI' and 56% agrees that 'progress in AI is moving too quickly at the moment'. Certainly, we should be watching for a backlash against AI as all of this plays out.

72%

of the UK agree that 'there needs to be more regulation around AI'

56%

agree that 'progress in AI is moving too quickly'



Grok



Five steps to getting future-fit

01

Play around with generative AI during the early stages of your thinking.

Pose ChatGPT some of your business and marketing challenges. Use it to dig out audience insights. Experiment. It's not going to give you the perfect answer but keep refining and editing the conversation until it yields a more interesting output or at least gives you a fresh perspective for your brief.

02

Work with Mindshare to identify those media tasks where generative AI could streamline processes or add value.

Get specific. Perhaps the creation of a more bespoke tool is required for certain tasks. We can help with that. Could it help you make more sense of your in-house data sets, for example, or do you need a more specific content creation tool?

03

Prepare for a very different search landscape.

Keep your eye on developments, such as how ads will be integrated into more conversational search engine results and how branded content might feature in social search. How might you use this type of search to drive richer brand interactions? Could you integrate conversational search into your own channels too?

04

Consider the impact of generative AI on the creator economy.

Are any of your associated creators making content using generative AI? Is this a problem? Tools available from partners like TikTok are also available to brands – perhaps you could make use of them in-house.

05

Enjoy the (very rapid) rollercoaster ride.

Make peace with the exponential rate of change with this trend. There are new developments happening every week, so try to filter through the noise and drill down to what's really important, such as changes to regulation. It will be fascinating to see what transpires. It might not be invented yet, but with the continued rapid developments in this space, the future capabilities for media are boundless.



How are our other trends doing?

Immerse Me

Immersive tech experiences did indeed shift up a gear in 2023, with 3D OOH advancing, AR experiences getting more sophisticated, and multidimensional and multisensory advertising starting to make their mark. These themes will continue in 2024, but, on top of this, expect to hear much more about spatial computing. This will be spurred on by Apple promoting spatial video within the iPhone, and finally releasing the highly anticipated Apple Vision Pro mixed reality headset to market (around March). At a very high price point, the Vision Pro won't be hitting any huge sales numbers initially, but it will set precedents for the category. VisionOS, which will be powering the headset, is described as the first OS designed from the ground up for spatial computing. It will link in with other Apple apps seamlessly, bringing new experiences and use cases along with it. Spatial computing will take time to hit the mainstream agenda, but 2024 will certainly be a year in which the foundations are laid.

Virtual Insanity?

The metaverse feels long forgotten with generative AI eating all of the headlines. However, metaverse developments will be ticking away in 2024. Despite 81% of the population having heard of the metaverse now, there is still some major ambiguity around what it is exactly. And this applies industry wide too, as we wait for the concept to evolve. Gaming still remains the best route in, and the place advertisers should be using as a test bed. Brands like Roblox are set to expand their ad offerings. But we should perhaps not limit our thinking to just experiences in virtual worlds. The metaverse should be thought of as a wider set of themes and technologies, and a new way to experience the internet. This is where the shift will be in 2024. The Apple Vision Pro headset will reignite the spatial computing conversation, for example. The decentralised web (Web 3.0) will be back on the radar too, driven by wider uptake of blockchain technology and some important milestones for cryptocurrency.

Home Sweet Home

The uptake of new smart home devices was quite subdued in 2023. Connected TV and smart speaker ownership remains high but relatively static, and appliances such as smart lighting, heating and plugs aren't top of people's tech wish lists due to the cost of living. Seamless smart home experiences did become more of a reality though, with the Matter protocol bringing more compatibility between devices. There will be more progress for the smart home in 2024 too, with generative AI about to bring better automation, more intuitive interactions and predictive capabilities. Improved voice recognition, for example, will allow people to do so much more with all of the connected devices in their homes. Generative AI will also enable devices to learn from previous interactions and act on them more readily. More widespread 5G coverage is also set to enable better smart home experiences.

OM5G

OM5G was one our 'static' trends last year. Even though the networks continued to roll out the infrastructure, people weren't upgrading to 5G enabled phones, due to the cost of living. But for most in 2024, it will be time for an upgrade and 5G will filter through as standard with newer flagship models. We will start to see 5G integrated into other devices too. It's been a slow start, but this trend is definitely due a boost, with barriers to entry being gradually removed. Knowledge about 5G is still relatively low though, and it may take time (along with an expanded network coverage) for people to really understand and appreciate the benefits of 5G beyond it being just a 'faster 4G'. It's things like live events and gaming that will really help people get to grips with the latency benefits of 5G, so expect the network providers to double down on marketing their services for experiences like this.

Look Who's Talking

Smart speaker ownership is now high, but plateauing. However, our research does show that people are starting to use smart speakers more frequently and for slightly different things, such as commerce. But, everything is about to change with generative AI bringing the possibility of more conversational interfaces to voice-enabled devices in 2024. Voice devices could be used very differently as they get smarter and offer more natural and efficient interactions. They will be able to have more personalised conversations and understand context, for example. Amazon, for example, have recently announced a custom-built generative AI update for Alexa, which will make interactions much more human.

Generative AI is also set to supercharge the podcast category and improve text-to-speech and speech-to-text tools too. Voice is certainly on an upward trajectory.



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Sophie Harding

Head of Futures & Innovation

Sophie.Harding@mindshareworld.com

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