



PUBLICIS MEDIA

PMCI

CONTENT & INNOVATION

FUTURE **FWD** >>

>2024: Emerging Tech & Media Innovation Trends Unveiled

November 2023

NOTE FROM THE EDITOR



As we look ahead towards 2024, the ever-evolving US media scene is undergoing a profound transformation. Traditional television faces formidable challenges, while streaming platforms continue to rise. Within this dynamic environment, Publicis Media Content & Innovation (PMCI) stands as a beacon of innovation and expertise, aiming to empower brands' journeys into the future.

At PMCI, we leverage our suite of “Alpha” – unique thought leadership and access to an extensive network of emerging technology and next-gen media partners, to unlock growth opportunities for our clients. We recognize the importance of adaptability in the face of inevitable change and are constantly looking to combine creativity with strategic foresight to identify the trends, technologies, and market shifts that matter most to our clients.

Our vision for the future is crystal clear: Web3 has emerged as the harmonizer for XR, Blockchain, and AI technologies. It is shaping a new era in consumer experiences characterized by heightened immersion, decentralization, and intelligence. We invite you to collaborate with PMCI to create a well-informed, calculated roadmap and criteria for your brand.

Our macro trend report FutureFwd, curated by our experts at PMCI, offers select perspectives and recommendations designed to empower brands and agency partners, whether you are an industry veteran or newcomer. These insights underscore our commitment to helping you not only remain relevant but flourish in the years to come. We've even included our **wildcards**, highlighting hot topics lively debated within our team.

Should you have any questions about the content shared in this report, reach out!



JESSICA
BERGER
SVP, Innovation, PMCI

2023 SOLIDIFIED WHAT WE LONG KNEW WAS COMING:

The Demise of Linear TV & A Fragmented Landscape - **Shake Up The Future of Traditional Media**

22

Avg. number of connected devices in US households

Below 30%

Linear TV viewing has sunk to record lows since 2021 as streaming soars to new heights

49%

of advertisers believe that activating their own 1st party data is the most promising solution to cookie deprecation as Google's phaseout looms



Source: Publicis Media, PMX Marketplace 2023; [Techjury](#)

GEARING UP IN 2024, AND SOON READY FOR PRIME TIME:

Next Generation of Consumers Are Tech-Empowered,
Driven By An Ever-increasing Pace Of Technology -
Transforming The Way They Consume Media

40%

of Gen Alpha have used a tablet, and
by the time they turn 7, more than
half are using video game consoles

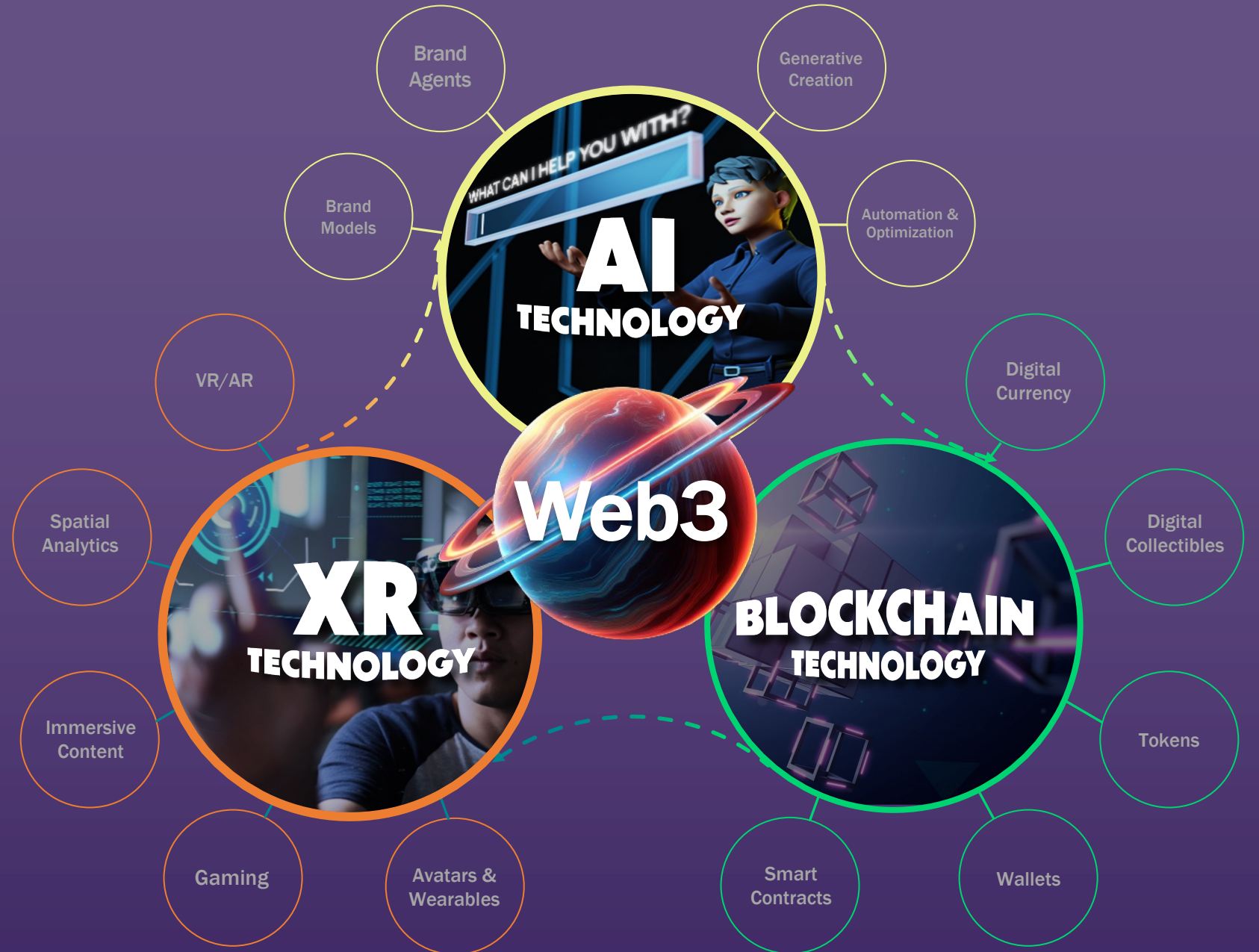
6.7

Avg. active loyalty
programs amongst GenZ

**\$180
BILLION**

Expected AI wearable
tech market in 2025

Web3 harmonizes XR, Blockchain, and AI technologies, shaping the future of consumer experiences





ERIC
LEVIN

Chief Content & Innovation Officer, PMCI

NAVIGATING THE STORM: AN EXECUTIVE PERSPECTIVE

In the ever-changing realm of media and entertainment, the year 2024 is poised to bring about seismic shifts that demand our attention. We've heard this before, right? Perhaps. But no other industry has been hit by as many storms as the content space has over the last several years. Let's review:

- Traditional cable and linear television, once the undisputed kings of home entertainment, now stand at a crossroads, grappling with the relentless rise of streaming platforms. Their audience is old – and getting older.
- The pandemic, an accelerant of trends already in motion, has hastened the near-demise of cable TV, making adaptability the name of the game for both brands and media agencies.
- The proliferation of platforms has kept content demand at an all-time high, which has also created enormous stress on brands looking to connect in new and different ways.
- The so called 'funnel' has collapsed. In its place are seamless content-to-commerce experiences that need greater adoption across the board.
- Lastly, consumers, more discerning than ever, have embraced ad-free environments and are shaping the media and entertainment landscape through their preferences for streaming and on-demand content, in addition to their lack of commitment to any one channel or platform.

Brands, recognizing this profound shift, need to start exploring new ways to reach audiences, from original content creation to immersive brand strategies within new environments. The proliferation of channels and platforms means brands must navigate this diverse and sometimes chaotic spectrum to ensure their presence resonates effectively.

To thrive in this evolving media landscape, I believe, aligning strategies with the changing tide is not just a choice; it's a necessity. The ability to understand and harness emerging technologies and meet consumers where they are will be the defining factors for success.

FOUR TRENDS READY TO FUEL THE SUPERCHARGED CONSUMER EXPERIENCE

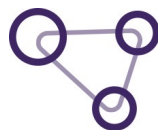


ON-DEMAND

Instant Content-to-Commerce Technology

Billions of viewers worldwide are engaged 24/7 with their video screens. Somewhere between Netflix, streaming apps and subscriptions resides the future of the media and advertising industry. In 2024, technology will unleash more novel experiences such as instant content-to-commerce.

> How do these new media ecosystems evolve and drive new consumption habits?



CONNECTED

Immersive Digital Ecosystems

Prepare for the continued evolution of immersive entertainment, propelled by the release of cutting-edge mixed reality devices and AI wearables. These devices, coupled with seamlessly connected digital wallets, are becoming the epicenters for content, commerce, and convergence.

> What are key verticals and functionalities driving early wins in the immersive space, resulting in trusted gateways for brand loyalty?



ENHANCED

AI at the Crossroads of Identity & Social Life

Anticipate an increase in social interactions with AI-driven agents across platforms and tools that enhance creative output and personalization as a key to unlocking loyal consumer engagement.

> How can your brand make media experiences more participatory and harness the transformative power of Generative AI while remaining brand safe?



INTEGRATED

Gaming's Evolution, Brands' Revolution

Expect an emergence of gaming as the center of gravity for pop culture. We'll see more brands nurturing connections within gaming communities to embark on profound journeys within the gaming universe and cultivating genuine partnerships.

> What will enable your brand to foster communities in this growing gamer ecosystem, no longer just tied to consoles?

KEY
2024

Considerations:



INSTANT CONTENT-TO-COMMERCE TECHNOLOGY

People's online shopping habits have clearly undergone dramatic change over the last few years, with new moments to consume and shop being carved out in 2024.

DIVERSIFIED PURCHASE OPTIONS & STREAMING EVOLUTION

Interactive Live Events: Branded TV presents all kinds of possibilities, including interactive formats, new forms of product placement and more direct ways to 'shop' items featured in content, from buying fashion to requesting test drives. Expect more integrated opportunities to be the focus point in 2024.



Example: Amazon's NFL Live

will include opportunities for interactive ads – an opportunity to reach audiences at point of purchase decision.

In-app Marketplaces Make Up For Ad Free Subscriptions:

Shifts towards ad-free experiences on apps like TikTok are reducing ad inventory, and will make in-app marketplaces, shoppable videos, and Live streams essential for brands' success.

Instant Purchase from Streaming Shows & Shoppable TV:

Picture enjoying your favorite TV show, loving a character's outfit, and instantly buying it using content-to-commerce tech, merging entertainment and shopping seamlessly. While the application of QR codes in TV ads has already become more widespread, in 2024, we expect more integrated solutions to gain momentum.



WILDCARD: CONTENT DEEP DIVES

We'll observe a shift towards background value consumption with Lives, podcasts, and story deep dives, as middle-length content declines and consumers prioritize deeper emotional connections, even in advertising.



D Deadline

NFL Defends Focus On Taylor Swift & Travis Kelce Coverage As "A Pop Cultural Moment We've Leaned Into" – Update

The NFL is defending its recent coverage of Taylor Swift and Kansas City Chiefs' Travis Kelce's rumored romance as "a pop cultural moment."

Cultural moments like "NFL Swifties" carry across media formats like podcasts and will continue to capture lengthy attention



KIM
DENAPOLI

EVP, Head of Entertainment Strategy, PMCI

“Live event economy remains robust – and is just getting started”

We are seeing layered entertainment on the rise. Being open to being the entertainment vs surrounding the content as a brand is key. So is layering experiences across multiple platforms and devices - allowing us to create more and different programming.

Also big on my radar: The multi-universe of Live Entertainment, Experiential and Movies. From concerts to movies for Taylor Swift, Beyoncé, Dolly and the box office success of "Barbenheimer" - consumers are eager to go back out and are willing to make the investment to participate in multiple touchpoints.

REZ
REZABEK

SVP, web3 Creative Director, PMCI

“Kids are craving lore & an open connection 24/7”

Backstories are all my kids and friends are talking about, and they are just getting on open lines (think group facetime calls) and they're not just using it to talk face to face, but rather space to space to discuss theories and story deep dives.

Kids leave lines open like room walkie-talkies and keep them open all day. Join when you can, don't if you can't – a trend inviting people to want to hang out together, across all platforms at their convenience.



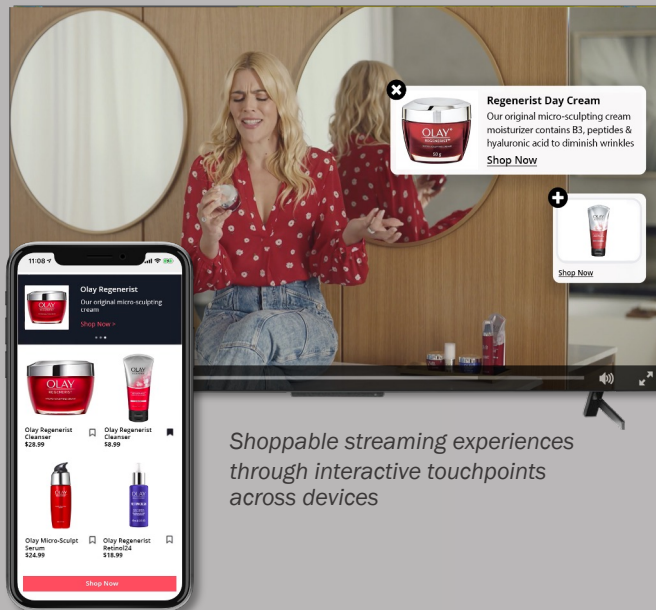
IMPLICATION FOR BRANDS IN 2024

Consumers' time, attention and resources are scarce - think differently to break through.

SHOP WHILE YOU STREAM

Adapt to the era of "Shop While You Stream" by strategically placing products within relevant content.

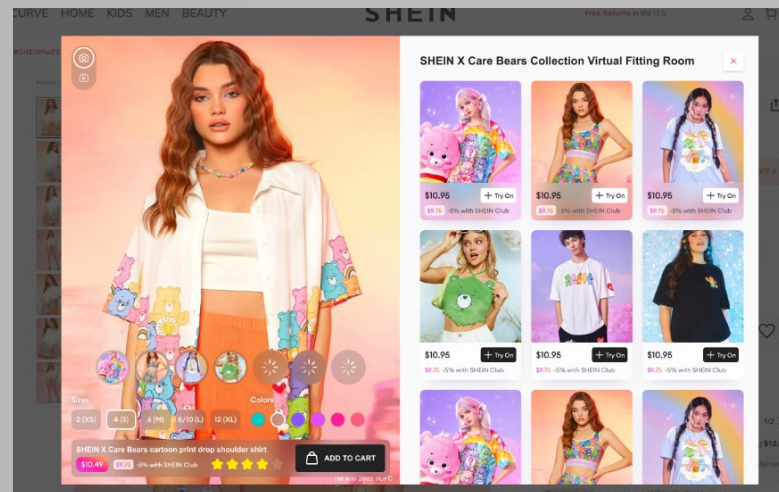
This trend necessitates collaborations with entertainment providers and key vendors to seamlessly integrate clickable, purchasable items, creating an interactive shopping experience for viewers.



Shoppable streaming experiences through interactive touchpoints across devices

CHOOSE YOUR ADVENTURE, AND YOUR PURCHASE

The Shoppable Media trend is accelerating with real purpose: Everything, including shoppable search, banner ads, shoppable TV, shopping in virtual environments and shoppable options on brand-owned media channels is on a rapid growth trajectory.

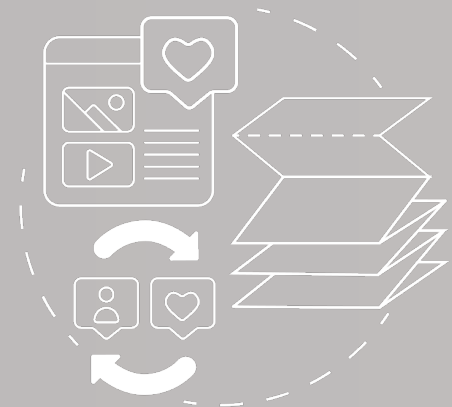


No longer tied just to social apps, AR tech for virtual-try on can significantly enhance real-time shopping experience for all devices, on any e-comm platform

LONG-FORM CONTENT'S RENAISSANCE

Offering a new, affordable version of spin-off shows: Tap into the demand for diverse content by investing in storytelling and lore that crossed devices and formats – from podcasts to post show-lives.

Recognize the value of long-form content, to engage audiences in the background even while they consume other media. This trend encourages brands to explore content beyond quick, attention-grabbing formats, providing meaningful value to audiences and extend customer lifetime value.



IMMERSIVE DIGITAL ECOSYSTEMS

Immersive tech will enhance people's wider world experiences more prominently in 2024, both in a functional and in an entertainment-based way.

THE METAVERSE WASN'T BUILT IN A DAY (OR YEAR)

Now that the M-word has taken a backseat in the press, and we've reached the Slope of Enlightenment in Gartner's hype cycle - the fundamental evolution of the tech that enables *metaverse moments* will continue its path towards integration.

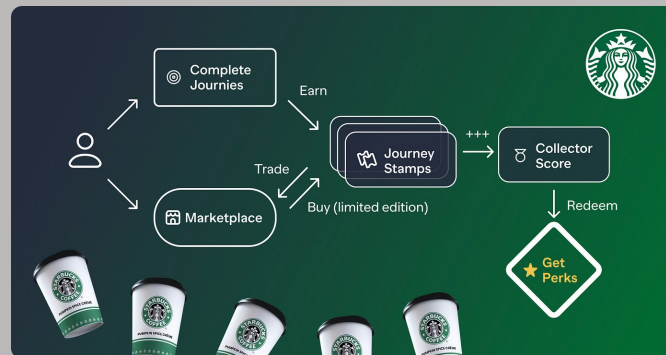
As a steppingstone toward this new paradigm of consumer interaction, we see Apple's release of Vision Pro – a category-first mixed reality headset – along with other major device releases like Meta's Quest 3 key to driving virtual media growth over time.



UNIVERSAL LOGIN FOR SEAMLESS ACCESS

A single digital key that unlocks a multitude of online experiences: Digital platforms will refocus on user identity and verification in light of the impending third-party cookie deprecation in 2024.

As a result, more large-scale consumer brands will use web3-enabled digital wallets to counteract data loss and strengthen consumer connections by providing more secure, decentralized data management, ensuring user ownership of assets, and facilitating direct, personalized interactions.



Starbucks Odyssey Web3 loyalty program, user journey

WILDCARD: AI WEARABLES

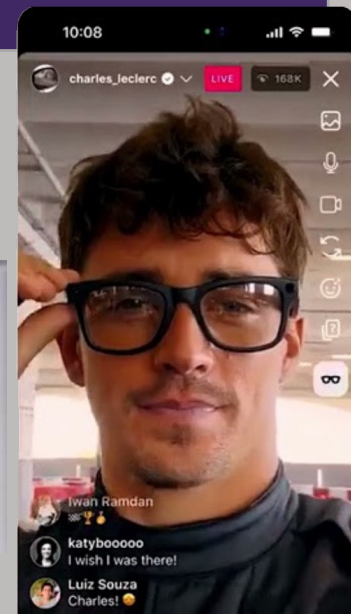
Several AI wearables have emerged in 2023 and we think will continue to break barriers in 2024, each with unique features and functions.

Pushing towards a post-smartphone era: These include Humane's AI Pin, Rewind.ai's recording pendant, and Meta's smart glasses with AI chatbot integration. These devices will aim to offer AI-driven experiences through wearable form factors.

Meta's new Ray-ban glasses are now multi-modal, meaning that Meta AI can "see" and interpret what you are looking at.



Screenless Humane AI Pin





KEITH
SOLJACICH

EVP, Head of Innovation, PMCI

“It's clear that innovation will remain a driving force, with the convergence of XR, AI, and Blockchain technologies at the forefront of reshaping content, media, and brand experiences”

In the short term, we're looking at groundbreaking immersive experiences that blend seamlessly with reality, captivating content that surrounds audiences, and personalized experiences that speak directly to each user. Long term? Well, we're entering a new era where the lines between virtual and real blur, offering us limitless creative horizons.

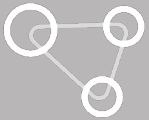
Brands that can seamlessly integrate their products or services into these experiences will see remarkable returns on investment.

CHRISTOPHER
OUTRAM

EVP, Head of Blockchain, PMCI | LionVault

“We are in the infancy of a revolution for experiences that are powered by these technologies”

We are seeing an endemic home inside of organizations with KPIs that are aligned with common business objectives for innovation projects. There are second mover (or later mover) advantages but there is a heavy tax for being late and for some businesses there is an existential threat and risk to their business model they simply cannot overlook.



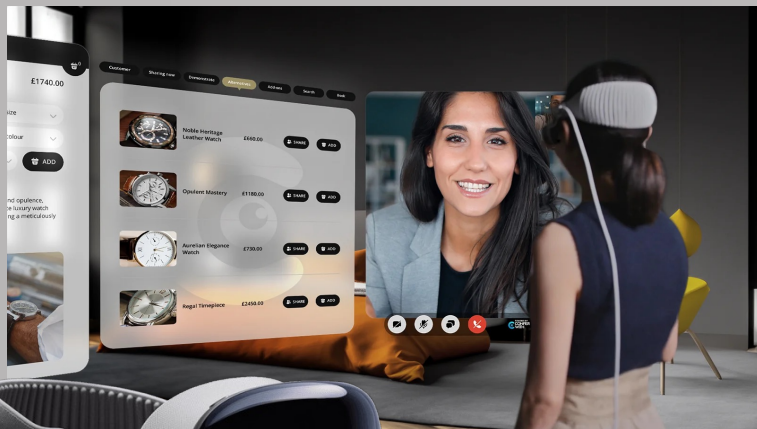
IMPLICATION FOR BRANDS IN 2024

The convergence of product, content, and commerce within immersive digital ecosystems presents opportunities for brands to create seamless, value-driven experiences.

REIMAGINE THE IMPOSSIBLE

New XR headsets emphasize rise in immersive entertainment & enhanced content consumption: Bring consumers into gamified virtual product launches and showrooms like never before.

New interaction paradigm: Without traditional input devices, adapt by utilizing intuitive interfaces and AI-powered recommendation engines for seamless interactions. Testing these technologies early will be key to gaining learnings and getting ahead of the competition.



OWN THE OPT-IN

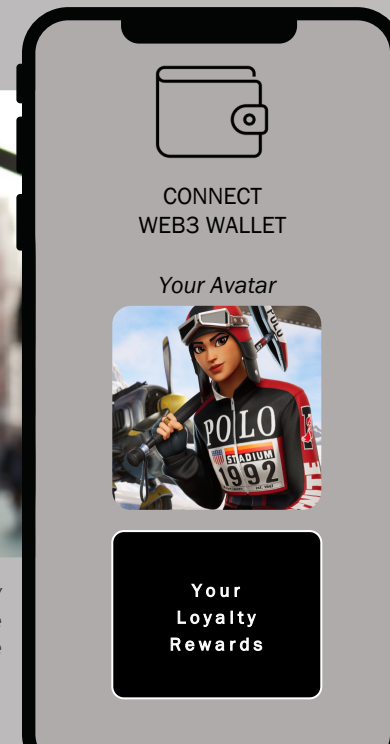
First-party data strategy: The impending deprecation of third-party cookies underscores the importance of having a clear first-party data strategy. Your own opt-in loyalty programs can leverage these exclusive environments for more targeted and personalized efforts.



A user's digital wallet can house a comprehensive loyalty program that can extend beyond the transaction in-store into any digital or physical touchpoint consumers have with a brand.

PRIVACY CONCERNS ARE A PRIORITY

Transparency and data security will become critical considerations: AI wearables that resemble traditional accessories will continue to battle privacy concerns, particularly when users are unaware of when the devices are recording.



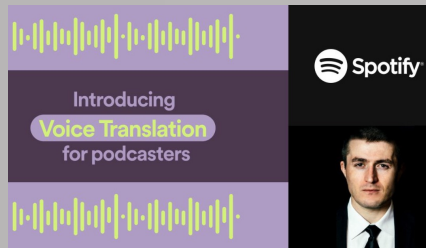
Secure & Compliant



AI AT THE CROSSROADS OF IDENTITY & SOCIAL LIFE

As usage of AI-powered features and tools enters new media territory, people's expectation for seamless brand interaction will change.

AI-ENHANCED CONTENT CREATION



Spotify's podcasts are now multilingual

Generative AI for creativity and media will be the requirement, not the option:

In the realm of content creation, and as an iterative tool to personalize creative outputs, brands will leverage AI to enhance creative processes and outcomes across all forms of content.



AI-driven NPCs in gaming experiences: AI-powered non playable characters will enable brands to engage with players in real time. With a host of talent like Megan Fox or Nicki Minaj already getting their video game debuts this year, we think brands might even sponsor a celebrity or influencer integration into a game as a brand ambassador in 2024.

Nicki Minaj (not yet AI-driven) playable character in Call of Duty

AI-DRIVEN AGENTS

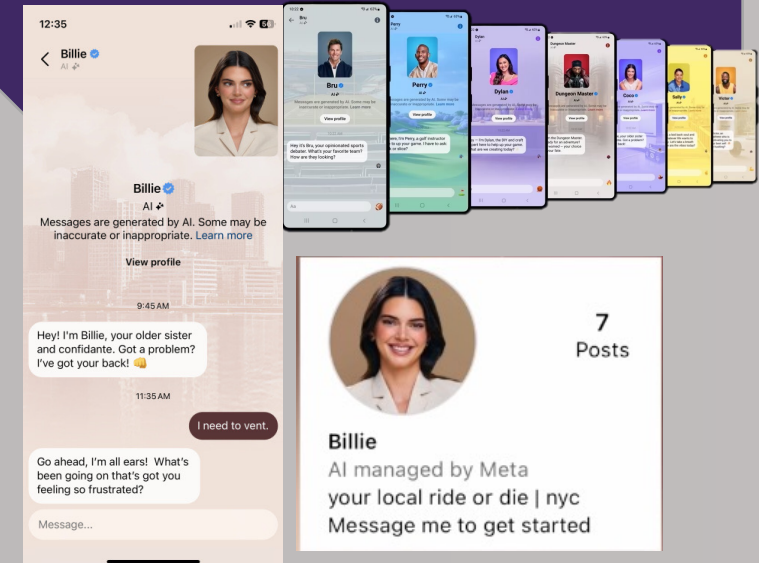
Socializing with AI chatbots: Offering instant responses to customer inquiries, handling routine tasks, and providing personalized recommendations, or even enhancing live streaming e-commerce – AI enhanced interactions will become a game changer, starting in 2024.



AI-generated live streamers in China supplementing night shifts

WILDCARD: AI-POWERED "DIGITAL PERSONAS"

While still in beta and in need of robust guardrails, we think brands and celebs will lean into the power of ready and custom-made avatars like Meta's AI bots – and their ability to create memorable social experiences at scale and to set up pipelines for commerce.



Kendall Jenner's AI persona "Billie", managed by Meta



ANDREW
KLEIN

SVP, Creative Technology, PMCI

“High in demand: Branded Generative AI & AI fueled gaming”

There will be increased expectation of cooler, more novel AI experiences that are multi-channel, in-game and personalized. These AI tools will allow audiences to engage, learn, play and create with brands like never before. With the state of AI innovation moving at breakneck speed, brands need to explore, design, test and iterate these incredibly powerful experiences that will be accessible through just about any digital touchpoint.

Gen AI is new and there is a lack of understanding of AI models, training data, and compliance that can pose immense risk to brands engaging with unverified AI startups and inexperienced teams – To get started, brands will need to start prioritizing their AI strategy and playbooks or they will not be a Top-of-Mind brand for consideration with Gen-Z or Gen-A.

MARK
SETTLES

Manager, Innovation Strategy, PMCI

“DE&I initiatives in the AI space will be a massive opportunity for brands to be on the right side of history”

New tech is often resisted by the masses until early adopters make it accessible, and that's our goal at PMCI. We're addressing this challenge by integrating AI training into Marcel and making AI tools and resources accessible across the Groupe. By ensuring AI upskilling becomes as essential as other training programs, we aim to enable Groupe-wide, AI-fluency.



IMPLICATION FOR BRANDS IN 2024

Maximize AI benefits with human oversight for marketing success at scale, recognizing that AI will be driving interactions across platforms.

ETHICAL CONSIDERATIONS & SAFETY GUARDRAILS

We'll be seeing debates and regulation speeding up in 2024 as the tech is not slowing down any time soon. Lean on trusted partners to help develop a safe and compliant AI strategy.

Our AI cornerstones for clients:



Publicis' internal Marcel platform is being used to educate our workforce on our AI Acceptable Use Policy and AI Legal Guidelines at scale.

PublicisGPT, instantly empowered our workforce to safely access AI tools and facilitates product and partnership development.

Publicis' LionAI, a Groupe-wide connected Center of Excellence enables our clients to partner with our global AI experts.

Publicis is a member of the **Steering Committee of the Coalition for Content Provenance Authenticity**, setting robust content authentication standards and fostering transparency in content origins.

FIND THE RIGHT AI APPROACH

Assess new audience value opportunities by identifying meaningful use cases for generative AI, considering the benefits it can offer and problems it can solve. Evaluate potential gains in media efficiency and effectiveness, including experimental and transformative opportunities.



First-to-market opportunity:
SoundIQ
An AI audio solution powered by LionAI

Speed up time to first impression and craft your own brand voice and generate hyper-personalized content to use in omnichannel digital audio placements.

From synthetic text to audio or video - Learn to navigate through your product catalogue to always-on customer support, determine options with greater impact for your consumers.

GAMING'S EVOLUTION, BRANDS' REVOLUTION

Gaming as a mainstream media activity powers on in 2024, driven by more opportunity to interact with content people already love.

BRAND PARTNERSHIPS & COMMUNITY-POWERED GROWTH

Diving deeper into the gaming world: More brands are already seeking meaningful integration beyond traditional "logo slaps." Now, they will aim to become more organic parts of gamers' stories, from playable characters and teams to seamless product integration.



Ted Lasso and the entire AFC Richmond team from the Apple+ TV show are available across multiple game modes in FIFA 23.

Gaming companies increasingly rely on communities for content and revenue growth: With rising revenue-sharing opportunities for creators, gamers' willingness to try new brands for exclusive rewards will drive repeat purchases and loyalty.

GAMING ON THE GO, GOES BEYOND GAMING

The Resurgence of Handheld Gaming: Devices like Logitech G-cloud and PlayStation Portal offer more opportunities to make gaming more accessible and mobile, beyond the anticipated Switch 2. This will allow people to increasingly play in more places.

Apple's Vision Pro will support PS5 and Xbox controllers: We will likely see more AR/VR apps come back with a strong push in the gaming industry.



FIRST MOVER ADVANTAGE? —
Demeo is one of the first "immersive" games announced for Apple Vision Pro

VR/MR gaming on the headset has been an afterthought for Apple, developers.
KYLE ORLAND - 9/7/2023, 11:00 AM

WILDCARD: GAMING AS A SERVICE

Gaming will continue to move away from physical games and towards digital only, subscription services and cloud gaming.

There will be a day when Xbox is no longer a box (device), but a service.



Logitech G Cloud

This console generation has seen an increase in digital only consoles



Valve Steam Deck



PlayStation®5

PlayStation®5 Digital Edition





SAMANTHA
LIM

Head of Gaming Strategy & Innovation, PMCI

“Be willing to test, learn, and adapt, even if you don't have every single answer.”

As gaming's popularity as a marketing touchpoint matures and the industry continues to evolve, the biggest challenge most brands face is identifying an authentic strategy with the right games and partnerships.

Gaming's growth is leading to a more fragmented and crowded ecosystem as more companies make a play to be part of a top leisure activity for younger generations. The upside is there are more opportunities to test, learn, and adapt to what is best for each brand. Once brands identify what works, the next challenge is identifying how to remain consistent while being relevant.



“Gamers crave a complete experience with great gameplay. With the advances in tech now it's easier than ever to deliver on those needs.”

With the aftermath of 2023's acquisitions and layoffs, we are likely to see a lot of emerging studios pop-up in 2024. This will hopefully add some diverse and innovative thinking to the gaming landscape we see today.

ATILA
FRANCO

Web3 Experience Designer, PMCI



IMPLICATION FOR BRANDS IN 2024

Embracing more authentic connections across devices means meeting consumers where they are – not where it's most convenient for you.

LEVEL UP YOUR BRAND NARRATIVE

Recognize that gamers are more receptive to meaningful and relevant integration within their experiences. It's no longer about mere advertising; it's about becoming a part of the gaming story.

Focus on creating authentic, immersive collaborations that resonate with gamers, such as playable characters, in-game events, or product integrations.

Craft creative in-game rewards and experiences that provide value.



Source: GWI Gaming, September 2023

EMPOWER GAMERS, ELEVATE BRANDS

Foster authentic partnerships with gamers and creators by implementing revenue-sharing programs, supporting content creators or sponsoring gaming events that align with brand pillars.

By actively supporting and engaging with the gaming community, build trust and gain credibility, to ensure relevance within the dynamic gaming landscape.



GAMING REDEFINED

With the rise of mobile & VR gaming, embrace the opportunity to reach audiences in diverse settings. Whether it's during the commute or at home, mobile gaming is becoming a lifestyle choice for all types of gamers. Mobile gaming is not synonymous with casual gaming.

Meet players where they are - the device doesn't define the gamer; the gamer defines the gamer.

Experiment with VR gaming strategies and explore immersive opportunities.



ENGLAND

GLOBAL SNAPSHOT

INDIA



ANNA
O'MAHONY

Global Content Lead, PMCI

"The biggest trend and opportunity lies in more meaningful experiences in a way that is simple to access and test, especially in new growth areas such as AI and gaming."

"Gaming IPs, creators & platforms are likely to scale up significantly but right now podcasts are the new gold rush in India and are likely to see greater traction by next year. Audio streaming is changing what and how India consumes audio first content."



TUSHAR
HANDA

Associate VP Culture & Creative Strategy, Publicis

Brand partnership programs are evolving with a focus on innovation and more personalized solutions.

Gaming is a growing sector and opportunity for more meaningful brand experiences in nearly all markets.

Virtual influencer products and innovative payment models are a growth opportunity in MENA.

AI is being explored for efficiency and brand activations but is often tied to ask for scalable applications.

Key Takeaways

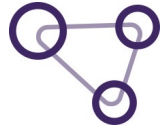


ON-DEMAND

Convert Consumers Instantly

It's no longer about just showcasing products but intertwining them with engaging narratives across devices and streams.

>Thrive in an on-demand world where media and commerce are linked seamlessly for ease of purchase.



CONNECTED

Navigate the New 3D Reality

Invest in strategies that embrace immersive digital ecosystems powered by blockchain, blending content and commerce within these realms.

>Position your brand as the top choice, capturing consumer attention and loyalty.



ENHANCED

Embrace the AI Advantage

Seize the AI advantage by infusing intelligent and compliant technologies into your content strategy.

>Master this pivotal moment that is already transforming the social and interactive media landscape.



INTEGRATED

Level Up Your Gaming Integration

Level up gaming integration strategies, recognizing the growing significance of games as a critical link to culture and a tech-empowered audience.

>Identify how to be consistent and unlock new competitive advantages in a crowded gaming space.

IN
2024

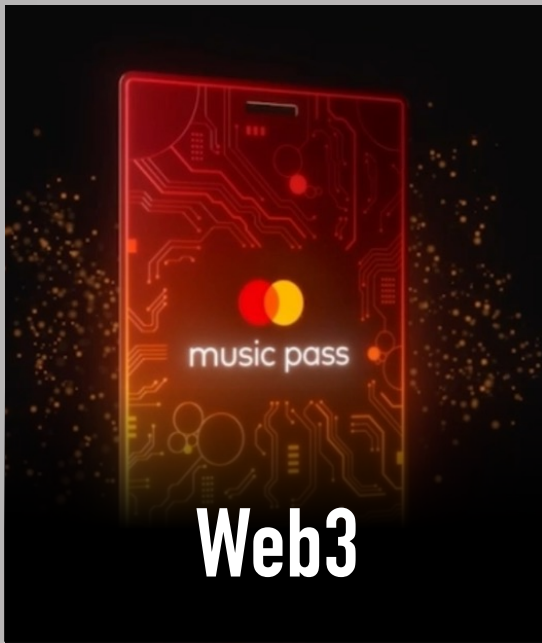
Things are moving fast in this space. **Opportunities to learn will be plenty. Be brave.**



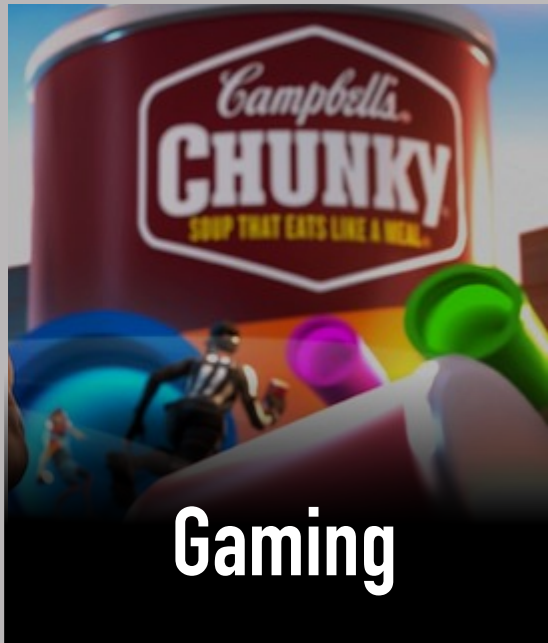
Entertainment



Innovation



Web3



Gaming



WE UNLOCK THE POWER OF WHAT'S NEXT

Thank you for reading.

At PMCI, our content and innovation capability supports Publicis agency teams and clients to stay at the forefront of a rapidly evolving industry, ensuring they can adapt, pioneer, and harness emerging technologies to create cutting-edge solutions.

From our consulting services to a unique suite of Alpha - thought leadership products, first-mover partnerships, and unique media products, our capabilities enable brands to tap into new markets, expand their reach, and unlock untapped revenue streams.

For further details or to inquire about how we can assist your organization in turning these trends into opportunities, please reach out to: PMCI@publicismedia.com



PUBLICIS MEDIA

PMCI

CONTENT & INNOVATION

FUTURE FWD >>

THANK YOU