



Navigating the new media world

How to win in a future that's intelligent,
accountable, and deeply connected to real
consumer behavior.

Outlook from Circana
A Special Release



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Media’s future demands bold thinking and a willingness to step outside familiar boundaries. **It’s time to innovate.** Advocate for transparency, adopt AI responsibly, and commit to campaigns that deliver measurable value. This moment in media doesn’t call for incremental change; it demands transformation. Together, we can create a media ecosystem that benefits brands, retailers and consumers alike. The future is unwritten. Let’s define it. **Are you ready to lead?** The opportunity to reshape media is here. We’ll do it together.

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Media is undergoing a profound transformation as consumer behavior evolves, competition increases, and technology reshapes the environment. The digital landscape brings opportunity, but it’s also highly fragmented and overloaded with content. AI, emerging tech, and high-attention platforms like gaming and retail media are challenging traditional digital. The emergence of non-media platforms as advertising vehicles, along with economic uncertainty, are also influencing the changing face of advertising.

Advertisers must balance compelling content with accurate measurement

People expect a seamless experience. But it’s getting increasingly harder to target the right platforms with the right messaging to highly discerning consumers in the moments that matter as they opt themselves out of third-party tracking. And as publishers shift to subscription models, many people choose to pay for ad-free content. But consumers are often likely to accept ads when they don’t have to pay to subscribe or can pay less. If the ad content mirrors their interests, people are more open to data collection for a better online experience – but only if that data is being used responsibly and collected on their terms.

Economic and technological forces are also influencing the mediascape

The cost of content creation, new advertising business models, and the competitive landscape for entertainment are increasing pressures on data centers that have surging energy requirements due to AI usage and reliance on cloud computing to maintain speed, scale and uptime. All this is forcing media companies to factor in the rising cost of energy. Disruptions are also driving up supply chain costs across multiple sectors, which in turn may be passed on to consumers; meanwhile rising infrastructure costs could impact ad tech’s real-time bidding, audience modeling, data processing, and programmatic efficiency. From pressures on consumer household budgets to the tariff adjustments influencing advertising spending and platform shifts, and e-commerce businesses selling goods to consumers across borders, global economic uncertainty demands a readiness to pivot at pace.



Media companies must
stay agile and responsive
to **remain competitive**

The ability to be agile and keep at pace with ‘techceleration’ has never been more critical. This includes investing in cutting-edge technologies, exploring new revenue streams, and continuously adapting business models to meet changing market demands. Additionally, companies must focus on building strong audience relationships and delivering value through high-quality content and personalized experiences. For example, music and streaming platforms are creating ad-supported tiers to manage affordability issues. And media companies are dialing up bundling options¹ with other SVOD services, broadband and pay TV packages, and mobile providers to counteract subscriber loss.¹ Global research² shows almost three-quarters of people canceled at least one content subscription at the end of 2023, with 59% admitting to subscription cycling.

New approaches to brand building are emerging too

Building and integrating into social communities fosters lasting brand connections. This is notable as investment shifts to influencers, social media, podcasts and gaming. For example, Twix capitalized on data suggesting that four in five American Super Bowl fans³ would ‘double screen’ at 2025’s Super Bowl – that is, check their phones to text friends and family and catch up on social media to gauge the internet’s reaction to both the game and ads. Twix designed a digital game around a modern human behavior, second screening, by awarding two solid gold bars on game day to fans playing the TWIX Second Screen Staredown⁴, where participants held their gaze on their phone while being tracked by its camera. The longer they stared, the more entries they earned.

Multi-platform strategies are key to capturing the attention of diverse viewer segments

Globally, a 2024 study⁵ revealed the top five ranking media channels for consumers are point-of-sale ads, cinema ads, sponsored events, newspaper ads, and out-of-home ads. This means companies must not ignore traditional media, but rather they should adopt multi-platform strategies to capture the attention of diverse viewer segments. This shift requires a deep understanding of audience preferences and behaviors, and the ability to deliver personalized content across various channels. Coca-Cola’s Share a Coke campaign⁶ sold more than 250 million named bottles and cans in Australia in 2011 before reaching more than 70 countries. Adding popular names on its packaging resonated deeply, delivering an emotional connection translating into strong sales and loyalty. The brand combined traditional media (TV commercials, billboards) with digital and social (personalizing bottles, #ShareaCoke hashtag, user-generated content) to increase engagement. And the proof of its magic is evident more than a decade on as the campaign messaging resonates with a Gen Z audience seeking nostalgia and personalization. Coca-Cola is lighting up retail media networks in 2025 with full aisle takeovers delivering the same emotive brand message from 2011.



¹<https://www.statista.com/topics/11059/media-usage-worldwide/#editorsPicks>
²<https://www.statista.com/statistics/1462111/content-subscriptions-actions-worldwide/>
³<https://www.prnewsonline.com/super-bowl-brands-embrace-multi-platform-campaigns/>
⁴<https://www.adsoftheworld.com/campaigns/screen-staredown>
⁵https://www3.kantar.com/l/1035373/2024-11-18/2cyfk/1035373/1731934795SqJdFdSO/Kantar_Media_Reactions_2024___Booklet.pdf
⁶<https://www.coca-colacompany.com/about-us/history/how-a-campaign-got-its-start-down-under>

Transformational trends are redefining the future of media, today

2025 demands that as an industry we reimagine how we operate – not just to adapt but to lead boldly. Media must become more precise, purposeful and accountable. This transformation won't happen by itself. It requires all of us in the ecosystem – retailers, brands, agencies, technology partners and innovators – to come together and create a smarter, more connected media environment. This is not a challenge one company or organization can tackle alone. It's an industry-wide opportunity. By working together, whether you're a media planner, data scientist, marketer, or publisher, your ideas can shape a future defined by collaboration and innovation. At Circana, we are uniquely positioned to lead this transformation, combining expertise, research-driven solutions, and verified data to shape an intelligent and more accountable media ecosystem.

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