

# THE BROADSHEET

## THE STATE OF MEDIA

■ Q1, 2024

Predictions compiled from top executives at: PubMatic, Mediaocean, Experian, Vistar Media, Seedtag, tvScientific, Eyeota, Belardi Wong, Aisle Rocket, CHEQ, Frequence, Fyllo|Semasio, MadTech Advisors, Beachfront, MediaWallah and VidMob.

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**BROAD SHEET**

# WHAT IS THE STATE OF MEDIA IN 2024?

We took on that ambitious question last year with our inaugural State of Media report. In it, we explored the industry's fragmentation – a unifying theme to describe the increasing complexity and diversity of media channels, measurement methods, and identifiers.

This year, we are taking a different approach. At Broadsheet Communications, we are fortunate to work with some of the leading minds in our industry; our purview is grounded in what we learn from them. How would they describe the State of Media today?

We put the question to executives from PubMatic, Mediaocean, Experian, Vistar Media, Seedtag, tvScientific, Eyeota, Belardi Wong, Aisle Rocket, CHEQ, Frequency, Fylo|Semasio, MadTech Advisors, Beachfront, MediaWallah, and VidMob. From their answers emerges a comprehensive situation analysis of the trends, challenges, and opportunities facing the industry in the upcoming year. We also provided our answers to the same questions, looking at things from the point of view of communications practitioners.

***Here's an overview of what we saw across all responses:***

**What are the three main trends you are watching in 2024?:** The three main trends for 2024 highlighted by respondents encompass the rapid adoption of immersive technologies and artificial intelligence, a significant shift towards sustainable and responsible marketing practices, and the drive for hyper-personalization in content delivery. The end of third-party cookies and the evolution of privacy-focused marketing are also central, with a notable emphasis on using first-party data and contextual targeting. The landscape is also expected to see the blurring lines between different media channels, particularly the integration of digital and traditional media, and the increase in retail media networks as a response to changing consumer data privacy norms.

**What's one word to describe the State of Media as we move into 2024?** The state of media moving into 2024 can be encapsulated in words such as "Changing," "Complex," "In flux," "Dynamic," "Transitional," "Exciting," "Fragmented," "Optimistic," and "Constructive." These descriptors reflect an industry in the midst of transformation, grappling with new technologies, evolving consumer expectations,

# WHAT IS THE STATE OF MEDIA IN 2024?

and significant shifts in privacy and data utilization practices. The varied responses underscore the multifaceted nature of the media landscape, indicating a period of both challenge and opportunity.

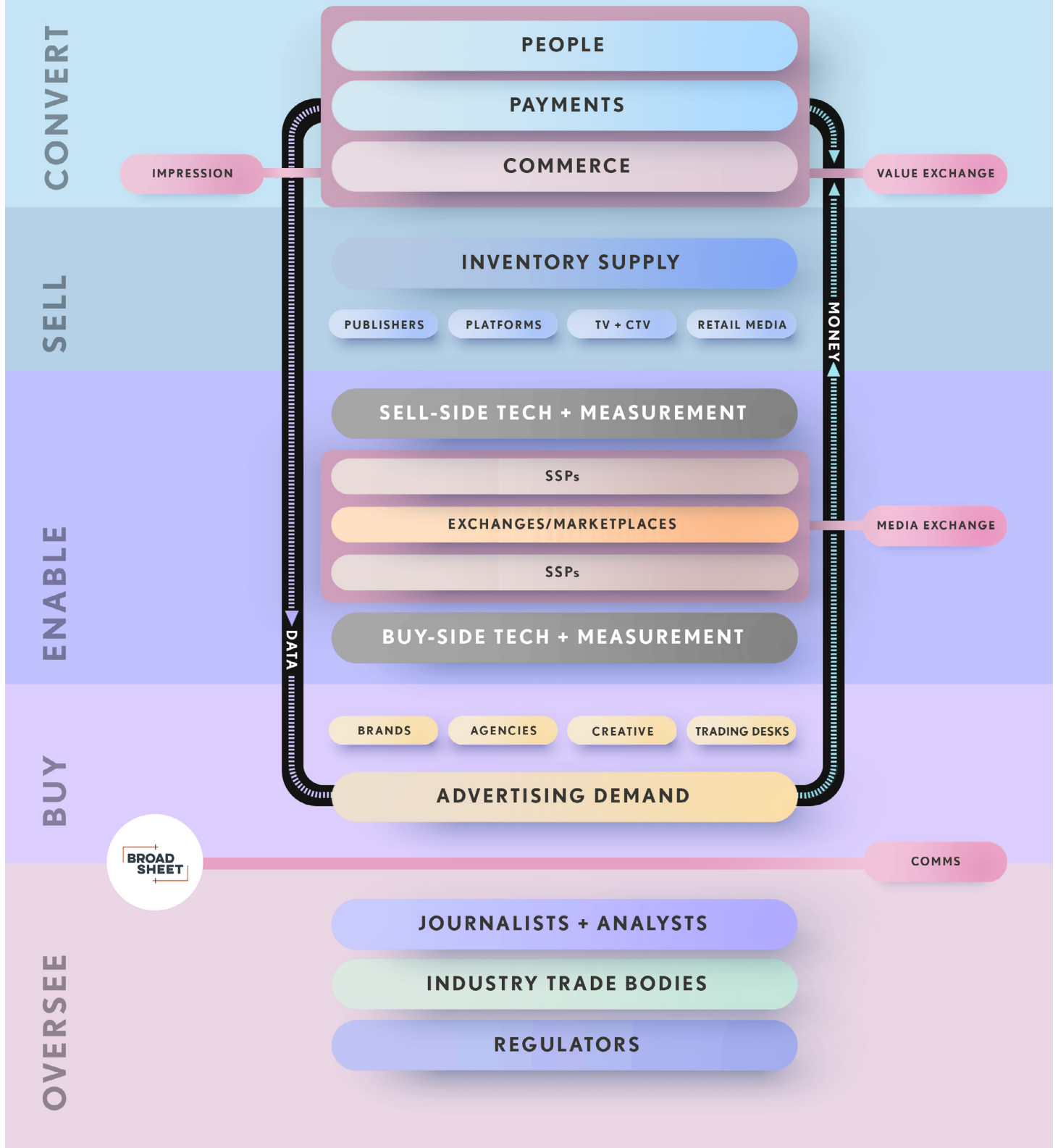
**2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?** The consensus is that the industry is at different stages of readiness for the departure of third-party cookies, with many still navigating the transition. While some companies have proactively developed and tested alternative strategies, such as focusing on first-party data and exploring new targeting technologies, there remains uncertainty about the overall impact on targeting efficiency and ad performance. The readiness varies significantly across the board, with a blend of preparedness and apprehension about the scale and implications of this shift.

**AI is transforming everything. What is one application of AI that you think deserves particular attention?** Artificial Intelligence's role in content creation, mainly through generative AI for imagery and video, garners particular interest among respondents. Beyond content generation, AI's application in data analysis for actionable insights and optimizing ad campaigns through predictive modeling and automated decision-making are deemed critical. The potential for AI to revolutionize creative testing, audience segmentation, and user experience enhancement is a game-changer for the industry.

**What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?** Focus areas for major tech platforms include navigating the evolving regulatory landscape, leveraging their expansive first-party data for targeting and measurement, and exploring innovative advertising products. The challenges and opportunities presented by the walled gardens of these platforms, especially in the context of privacy changes and the end of cookies, are a central concern. Companies aim to understand and adapt to the platforms' shifting dynamics to optimize media spend and achieve audience penetration.

**What is your company most excited about in 2024?** Potential for growth through advanced AI applications, the exploration of sustainable marketing practices, and the ability to deliver more personalized and impactful advertising experiences are key themes. There's a strong focus on enhancing data capabilities, developing privacy-compliant targeting solutions, and seizing the opportunities presented by the rapid changes in the overall landscape.

# THE BROADSHEET MAP of DATA-DRIVEN MEDIA



**Q. What are the three main trends you are watching in 2024?**

Following Google's move to finally begin deprecating third-party cookies from Chrome at the start of 2024, the changing addressability and identity landscape is poised to be a key trend in 2024. While many of us in the advertising technology space have been preparing for this change and urging clients to test cookie-alternatives for years, action is finally going to be required by publishers and media buyers. Commerce media is emerging as one of the big winners in this space.

We will also see a new phase of accelerated buy-side, sell-side convergence. In 2023, the lines between companies traditionally known for their DSP or SSP capabilities began to blur as players across the digital advertising supply chain began demanding greater transparency and efficiency. I expect to see continued innovation and development in this area as solutions like PubMatic's 'Activate' take hold.

Lastly, I expect responsible media to continue to be a key priority for brands as they increasingly look to their advertising supply chains as a new frontier for carbon reduction. Ad Net Zero is planning to release their campaign measurement framework this year, and I am already seeing more innovation and development in this area as companies build upon their findings from 2023.

**Q. One word to describe the State of Media as we move into 2024:**

Fragmented.



 PubMatic

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready?**

What is still up in the air? At PubMatic, we've been building a portfolio of solutions for the past four years to support our clients' transition away from third-party cookies, including 'Identity Hub' for alternative ID management, 'Connect' for data activation, and 'Convert' for commerce media. Recent analysis has shown that the presence of alternative IDs in the bid stream actually drives a 16% increase in publisher lift and over 75% of impressions on the PubMatic platform have alternative signals attached other than the cookie. Despite the progress we, and the industry, have been making to prepare for cookie deprecation, comfort with the performance stability of the status quo has prevented companies from investing in changing their media buying strategies on a larger scale.

**Q. What is your company most excited about in 2024?**

2023 was a year full of innovation for PubMatic, as we launched two major new products: Activate, which is an end-to-end supply path optimization product that seamlessly connects buyers and sellers, and Convert, a commerce media platform supporting onsite and offsite advertising. As we enter 2024, I am excited to see these new solutions continue to disrupt the digital advertising ecosystem, bringing greater efficiency, transparency, and performance to the programmatic supply chain.

**Q. What are you reading? What are you watching? Give us the recs!**

I finally watched The Morning Show on Apple TV+. As advertising professionals, we fund the creation of much of the content we all enjoy across the internet and streaming TV, and I absolutely loved immersing myself in the content side of the media world.

**Q. What are the three main trends you are watching in 2024?**

1. The niche-ification of AI as we move from broad LLMs to specific use cases.
2. The return of creative as the most important variable in ad campaigns.
3. The speculation on who will replace Ben Atkind as drummer for Goose.

**Q. One word to describe the State of Media as we move into 2024:**

Reprise.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients and/or partners (brands, agencies, publishers, data companies) ready? What is still up in the air?**

This has to be the longest farewell tour since the Dead. It remains to be seen if 2024 is really the year cookies go away, but there are plenty of John Mayers, er, alternative identifiers out there ready to stand in.

**Q. How will measurement change within the channels or applications you focus on?**

In the converged TV space, we're seeing advanced currencies take hold, moving the industry beyond panel-based monoliths towards big-data and multi-dimensional measurement.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**



Mediaocean's 2024 Outlook Report showed the top application of AI for marketers is not copywriting or image generation, data analysis and market research. In the same way that Microsoft Excel weaned us off calculators, ChatGPT is reducing our dependence on Excel.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

Regulation. From antitrust suits to privacy laws, Big Tech faces pressure on many fronts and in many countries. While these companies will continue to dominate consumer time spent and marketer ad spend, 2024 will bring a shift in Ad Tech towards independent platforms that can manage campaigns across walled gardens.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

It's all ABM all the time. We're being very prescriptive in who we're trying to reach and how we're trying to reach them. Like Phish playing a new-years' run at MSG, we know what will resonate with our audience.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We just relaunched the Flashtalking brand, and our marketing team is cooking up some very creative activations to accompany the product innovations we're putting in market. You can expect to see Flashtalking in some very unexpected places this year.

**Q. What's a company you admire – and why?**

Tedeschi Trucks Band, Inc. Just like the company in a musical, everyone in and around the band plays a vital role, and together, they form a greater whole than the sum of its parts. And just like a company in the business world, they're continually pushing the envelope with their product to produce new albums, movies, and live shows that drive customer loyalty and lifetime value.

**Q. What are you reading? What are you watching? Give us the recs!**

Well I couldn't get tickets for Taylor Swift's Eras tour and didn't make it to the theater for the movie so I'm left watching it at home on streaming. Never in my wildest dreams did I think I'd watch TV and scream something like long live Tay but I've been the archer and now I'm slayed.



**Q. What are the three main trends you are watching in 2024?**

- The long-awaited changes in the data ecosystem are at the top of the list. Cookie deprecation is underway, and results are starting to come in. It will be fascinating to see the results.
- CTV and RMNs have been the hyped-up growth drivers for the last few years. Though they both could face challenges in 2024, we're interested in how those two key market segments perform.
- The election and overall economy outside of the media world. It feels like it is going to be a choppy year with a lot of changes. It will be interesting to see how those things impact media and marketing.

**Q. One word to describe the State of Media as we move into 2024:**

Dynamic.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

There is a wide range of preparedness. Some publishers have succeeded in leaning into alternative identifiers to keep monetization going. I see many agencies with good game plans to solve their clients' problems. I think brands and marketers are aware of the issues but want their vendors and partners to make recommendations and solve these problems for them. I think data companies are cheering on the change as it will improve the security and performance of the data ecosystem.



**Q. How will measurement change within the channels or applications you focus on?**

Measurement is a difficult and tough task, even during the best times. I think the disruption in measurement is coming to a head this year with things like alt currencies and changes at Nielsen. I expect an up-and-down ride for measurement in 2024. However, I am excited for the industry to continue to push toward more sales and outcome-based approaches.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

I think many of the large language model (LLM) and chat applications have gotten a lot of attention, but I think some visual-based work with Dall-e and others should be grabbing more of the headlines.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

Amazon sits in the most interesting spot in the industry. They have a huge 1st party subscriber base in Prime, the best commerce data on earth, and are moving fast into streaming video. And by the way, they own the cloud space.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We are excited to see long overdue changes come to the data space! We need better identity resolution and a greater tie of audiences to outcomes. We have been supporters of these trends for a long time at Experian and are excited to see them come to life!

**Q. What's a company you admire – and why?**

I recently caught a speech by Jensen Huang, the CEO of Nvidia, and I admired his passion and vision for how Nvidia can power the AI future and how he has been setting up that future for many years. It was a great lesson on strategic thinking and skating to where the puck is going.

**Q. What are you reading? What are you watching? Give us the recs!**

I just finished a book called *Trust*, which I highly recommend. Other than that, I am on a steady diet of industry trades like AdExchanger and adding more substacks and newsletters like Brian Wieser's Madison and Wall.

**Q. What are the three main trends you are watching in 2024?**

1. Retail media: Retailers are trying to figure out new ways to compete with Amazon and Walmart, so they are looking at ways to further monetize the assets they have (think, in-store locations) as it correlates to the value of their audiences.
2. It's already been picking up steam, but I see the personal care category having a big year. There will be a continued focus on mental health, sleep-related products, and there will certainly be more attention around the impact of weight loss drugs, causing a lot of businesses to scramble and find new ways to operate.
3. It feels that data practices in advertising are actually starting to change with new privacy regulations, coinciding with cookie deprecation. There is a growing awareness of just how negative most online advertising and the platforms behind them are. So, I think the ad business needs to find a new way to operate across agencies, brands, and the platforms themselves.

**Q. One word to describe the State of Media as we move into 2024:**

Dynamic.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Actually, I think very few companies have a documented strategy in place for how they will approach audience targeting in the new era. There is greater attention on cohort targeting and contextual targeting. That's great for Vistar because non-cookie-based strategies and channels such as out-of-home are definitely getting more attention.

**VISTAR**MEDIA

**Q. How will measurement change within the channels or applications you focus on?**

In the past, out-of-home companies spoke about measurement they generally meant counting audience impressions, and it was a slow shift to move the industry toward actual campaign impact measurement. That is present now, and in 2024, I believe there will be more solutions that tie to key KPIs. For example, we now have solutions that can tie out-of-home to online conversion which opens the door for greater work in e-commerce –we'll see more solutions for specific vertical KPIs.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

We all know these platforms have been gobbling up large portions of the existing advertising budgets, and continue to do so. As budgets shift into these platform-direct buys, there's an impact on agencies –there is less of a role for them to offer guidance and strategy for these platforms. So the pool of marketing budgets that agencies have to control is starting to get limited. And now as brands are moving budgets away from TV, agencies really must ensure that those budgets don't just slip away into the same platform-direct pool.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

For our company, marketing has become more important for the business than it had been in the past. It used to be viewed largely as a sales enablement function, but now we are at a scale where marketing is needed to generate business independent of the high-touch sales team.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

Showing the world that OOH is a better form of advertising. It is the most human channel with the power to tell advertising stories in a proper way, and weave messages directly into the many moments –memorable and passing –that make up our days.

**Q. What's a company you admire – and why?**

Kimberly Clark figured out what they could be the best at and focused on it. The concept may sound a little boring in today's world, and we kind of forget about it, but they have been incredibly successful. As a society, we tend to focus on what's new and shiny, but Kimberly Clark focuses on creating great products that people need and they deliver them without getting distracted. They're more than 150 years old, and we all use their products every day.

**Q. What are you reading? What are you watching? Give us the recs!**

I just read Good to Great which highlights the keys to success of Kimberly Clark and other excellent companies... and I am watching RuPaul's Drag Race and The Brokenwood Mysteries, a New Zealand detective show.

**Q. What are the three main trends you are watching in 2024?**

AI goes mainstream, leveraged not just by businesses but by individuals looking to automate aspects of their life. Generative AI in particular will begin to be more integrated into advertising and creative decision-making, as well as by media planners looking to get more granular on custom audience creation and targeting. Additionally, the general populace will find ways to use consumer-facing AI tools to make purchasing decisions easier (i.e. find me a weekend get-away where I fly on my favorite airline and at a hotel that has specific amenities.) The way in which marketers leverage AI to connect with people using their own AI tools will be the ultimate commercial opportunity.

Continued shift toward streaming and CTV - but watch out for consolidation. In 2023, streaming TV overtook linear TV in viewership.

As more households shift to vMVPDs, or cut the proverbial cable packaged "cord" altogether, fragmentation will continue to make finding mass audiences outside of sports difficult. Look for broadcasters to try to create new "water cooler" content and stunts to attract a live or near-live audience. With the writers' strike behind us, Hollywood is already focused on this, but only a few platforms will be able to pull it off.



Prediction: RIP Paramount in 2024, with Peacock not far behind as there are only so many streaming services a household can support. Local discussions and state legislation around privacy will move toward a national conversation around the ownership of data and right not to be tracked. As Google accelerates the drawdown of cookies in the Chrome browser and inevitable new data breaches receive coverage in mainstream media, look for elected officials to take a privacy-first

approach and incorporate messaging on how they can “protect” consumers into their platforms. The question is, will they embrace privacy-compliant practices in their own advertising?

**Q. One word to describe the State of Media as we move into 2024:**

Constructive. We in the media industry generally have a good sense of what’s going to happen and where we need to go, however, real change often takes three to five times as long as initially projected. Therefore, you’ll see a lot of talk and some testing, but no major changes in the mechanics of buying, selling and measuring media for the next 24 months at least.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Agencies and brands were very active last year in developing their overarching strategies for the coming deprecation of cookies, and testing various vendor solutions or developing their own in-house products. However, the point-of-view of senior leadership and those tasked with innovation doesn’t always trickle down to the hands-on-keyboard traders, so every agency is at a different state of readiness. The future first comes slow, then fast, so as Google further deprecates cookies throughout the next few quarters it will be interesting to see how ideas come off the whiteboard and into action.

**Q. How will measurement change within the channels or applications you focus on?**

Alternative currencies to unify measurement across TV+digital+social will continue to be a hot topic ahead of the Upfront buying season, with more agencies embracing competitors to Nielsen and transacting on new methods. The attention metric will also continue to gain traction as a way for buyers to measure inventory quality, and get closer to a true driver of performance.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

The usage of Generative AI for creative versioning. This is a fascinating application with a wide range of opportunities to test and learn, but far too few clients are willing to give it a go, even with human guardrails



and approvals in place. By optimizing creative in the context of stronger placement, organic connections can be made with more relevance and attention.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

Americans spend nearly 60% of their time on the Open Web while less than 50% of advertising dollars are spent there, so at Seedtag we think there is still a huge opportunity to support publishers with smarter monetization, and to help advertisers leverage contextual to optimize their marketing results.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

Even though Seedtag is entering its tenth year as a company, we are still relatively new in the U.S. To help grow our brand awareness we've been very focused on owned and earned media to tell our stories, which feels most true to who we are.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

After an incredible first full year in the U.S. Market, we're looking to bring our unique capabilities to new verticals (political, DTC, etc.) and new channels (CTV and others), as well as enhancing our reporting and insight capabilities. Nearly every marketer and publisher has a need to contextualize their placements and messages across mediums and devices, so our ambition is not only to power those connections and executions, but to provide the observations and analysis on how they perform as well as what can be done next to continue improving results.

**Q. What's a company you admire – and why?**

Therabody. I'm really passionate about fitness and it's been exciting to see how the company has expanded beyond theragun, launching a whole new line of wellness products focused on better sleep, recovery and beauty.

**Q. What are you reading? What are you watching?**

I'm reading *Outlive*, the *Science & Art of Longevity* by Dr. Peter Atia, and I just finished watching *Drops of God* on AppleTV+.



**Q. What are the three main trends you are watching in 2024?**

One of the most notable trends in 2024 will be the rise of Performance TV. The initial phase of early adopters is coming to an end, and major brands are recognizing the potential of connected TV (CTV) for achieving KPIs similar to those seen in search and social advertising. This shift is driven by the convergence of CTV capabilities and low-cost creative platforms, which will encourage a significant influx of new TV advertisers migrating from other digital channels.

The adoption of advanced CTV measurement tools will likewise be a game-changer in 2024. These tools will be anchored in the concept of 1:1 TV ad exposure-to-outcome, complemented by advanced attribution analytics that identify the discrete impact of TV ads on conversions. Tools such as incrementality reporting, halo impact studies and more will allow advertisers to understand the full-funnel impact of their TV campaigns. This newfound clarity will showcase the power of TV as a medium capable of delivering measurable bottom-of-funnel results in addition to the obvious awareness impact of TV.

TV advertising is becoming more democratic, but the precise path forward is unclear. However, the emergence of tools and managed services with direct platform integrations is expected to make TV advertising more accessible to a wider range of businesses. This could potentially tap into a massive audience segment that has primarily focused on search and social advertising.

**Q. One word to describe the State of Media as we move into 2024:**

Optimistic.



**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

In 2024 there will be a massive opportunity for TV with the decline of cookies, but nobody is ready. Cookie deprecation could have a huge potential negative impact on the rest of digital, which means that a lot of advertisers will be compelled to try targeted CTV for the first time.

**Q. How will measurement change within the channels or applications you focus on?**

TV outcome measurement and TV's contribution to outcome generation will become more clear in 2024. Evolving technology and best practices will become more simplified and self-evident, while types of reporting from simple to complex will become more standardized so marketers can get to true north on the impact of TV.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

We use AI in many ways. The most impactful is optimization technology, which enables us to identify what's impacting KPIs and optimize accordingly. Other generative AI applications are having an impact on TV creative, such as Waymark and Spaceback, which allow users to use AI to create high-quality TV creative. Soon, I think we're headed toward fully synthetic, AI-created video.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

As a platform-first performance TV company, we want interoperability with all the platforms. For CTV, the interoperability for executing campaigns between platforms will be key in 2024.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

As a scrappy startup, you're always trying to find your voice in the market. We're in our 4th year, and we know the messaging better than we used to. We're looking at the next evolution of refining our message and execution. How do we get that out in the market? As we become more mature out of the gritty startup phase, we're creating our voice as a category leader.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

In 2024, we have the opportunity to power millions of businesses and enable them to participate in performance TV advertising with a self-serve platform. We're currently focused on expanding and marketing that product. We're also scaling our automated optimization technology to enable businesses and have it perform for them - a bit like Facebook's "set it and forget it" campaign functionality.

**Q. What's a company you admire – and why?**

I've always admired Apple for their clear "why" of what they do. They're not just about selling boxes, they're about unleashing human potential. I think the "why" for tvScientific is about powering businesses to grow and using TV as that growth vehicle. It's often helpful to focus on the "why" around the brand in addition to the actual products.

**Q. What are you reading? What are you watching? Give us the recs!**

I usually read 2-3 books at a time. I'm currently reading the Bourne Supremacy, Whirlwind by James Clavell, and a WWII history book.

I've been watching the Reacher series, which is fun, and whatever my wife happens to be watching on TV. The Bachelor/Bachelorette helps me fall asleep on the couch.

**Q. What are the three main trends you are watching in 2024?**

In 2024, our focus is on three pivotal trends shaping the industry:

**Cookieless Targeting:** Witnessing brands embrace alternative, cookie-free identifiers is a game-changer. The advancements in cookieless data solutions are poised to unfold, offering exciting possibilities for advertising campaigns.

**AI's Ubiquity:** AI's role spans applications, privacy regulations, and ad creatives. As cookies fade and privacy laws tighten, AI emerges as a linchpin for precise targeting and personalized ads, revolutionizing the industry.

**Media Delivery Shift:** The surge in streaming services and cord-cutting transforms advertising dynamics. Allocating more budget to CTV and digital streaming caters to evolving viewer preferences, allowing for personalized, interactive ads. Despite initial adjustments, this shift promises enhanced conversion tracking and elevated ad engagement. Navigating through consolidations and potential data partnerships, the advertising landscape adapts to the era of streaming, emphasizing targeted and personalized approaches. The trends of cookieless targeting, AI integration, and evolving media channels guide our strategies for a dynamic and progressive 2024.

**Q. One word to describe the State of Media as we move into 2024:**

Evolution.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Our clients are not entirely ready to say farewell to third-party cookies in 2024. While alternate IDs and solutions are in the testing phases, they haven't reached scale. We're actively assisting clients in accelerating their testing processes to ensure preparedness for impending changes.

Shifting targeting strategies from cookie-based to cookie-free is pivotal. As a trusted advisor, we focus on facilitating this transition seamlessly, guiding brands through the evolving landscape with expertise and support.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

One noteworthy application of AI is its pivotal role in data optimization and audience segmentation within the digital media industry. AI and machine learning advancements are enhancing auto-optimizers, cross-channel orchestration, and predictive audiences.

This transformative technology streamlines campaign planning, ensuring more efficient optimizations. Moreover, AI improves data collection, analysis, and offers profound insights into audience behaviors and interests.

Particularly in the data space, AI supports targeting behaviors, creates smarter, scalable audiences, and simplifies the discovery and utilization of data points for precise targeting strategies. The impact of AI in refining data-driven approaches is indeed deserving of heightened attention.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

Our primary focus is facilitating seamless access to our addressable data for advertising across major tech platforms like Google, Facebook, and Amazon. From leveraging proprietary Dun & Bradstreet B2B insights to harnessing extensive B2C audience data, our goal is to provide advertisers with unique targeting solutions globally. Ensuring our customers can optimize these platforms with our tailored data offerings is at the forefront of our strategy. We are delivering effective and comprehensive solutions for advertisers targeting diverse audiences on these channels.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

I am excited about guiding our customers' transition into a cookie-free targeting world. I'm also excited about expanding our data distribution channels, and delivering unique audience insights and data sets to our customers such as B2B and ESG to enhance advertisers omnichannel targeting capabilities.

**tQ. What are you reading? What are you watching? Give us the recs!**

I'm reading *Time to Think* by Nancy Kline: An insightful pause to think about how we can better communicate, listen and create a "Thinking Environment" that can benefit us and our organizations. I'm not up to date with the latest shows, but I am currently watching *Ted Lasso*!!

**Q. What are the three main trends you are watching in 2024?**

- The shift in consumer spending towards experiences rather than physical purchases. More conservative consumer spending overall
- Marketing costs and the continued shift across channels which influences where brands will be most efficient with their marketing dollars.

**Q. One word to describe the State of Media as we move into 2024:**

Dynamic –constant change.

From a performance standpoint in 2023 we saw a lot of highs and lows - high marketing spend driving high CPMs, more time online than usual generating more impressions bringing down CPMs, platform changes. At this moment that appears to be leveling off.

However, as we go further into 2024 we will continue to see media evolve and change, influenced by a shift in consumer behavior and new technology focused on incorporating more real time variables and enhancements.



**BW**  
belardi wong

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Marketers have been operating with a level of uncertainty for some time between the transition from UA to GA4, targeting in Meta moving to more algorithmic campaign types, and Performance Max in Google reducing advertiser visibility into keywords. The deprecation of third party cookies will be a continuation of these shifts in marketing. I would say the clients who ARE ready and ARE



succeeding are those that know their consumer well in terms of where they spend their time (online and offline), what value propositions speak to them, and what products they are looking for. This will continue to be the driver around what marketing channels to test next or where to devote energy, not perfect attribution or tracking.

**Q. How will measurement change within the channels or applications you focus on?**

The pendulum continues to swing on measurement. We are seeing a swing from a super charged focused on measurement and incrementality, back to somewhere in the middle where companies want to understand marketing effectiveness better. At the same time, they are investing in campaigns and channels because they feel they should rather than just because of the metrics. Investing in top-of-funnel marketing is a prime example of this, which we have seen increase as a result of company struggles with traffic this year. We are seeing more investment in top of funnel because companies struggled with traffic this year.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

AI has been a key component of building custom prospecting models for some time. However, we are seeing more real-time variables incorporated into the mix that not only look at customer buying behavior, but different correlations within massive amounts of data. This enables brands to be more predictive rather than reactive and over-reliant on historical data or prior consumer behavior that is no longer relevant. It also provides the opportunity for more personalized, hyper-targeting of customers/prospects that weeds through all the marketing clutter ultimately generating higher response.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

Meta released new generative AI creative tools in Fall 2023 that can support more rapid creative testing for brands. In Google, we saw some improvement, visibility and stabilization of Performance Max in 2023 as advertisers had a better handle on the product and Google released additional data visibility. It will be interesting in 2024 to see how much more Google will push consumers to transact directly in Google Shopping. New organic listings, powered by AI will also impact brands' SEO strategy.



**Q. How has marketing and communications changed for your company in recent years – and how will that project, into 2024?**

Expert marketers understand you must have a full marketing mix across online and offline channels. This continues to fuel support for print marketing programs, which continues to drive growth for Belardi Wong. In addition, since the customer journey and path to conversion is not always a straight line, we are continually focused on the development of strategy that includes various marketing programs that support each other.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We are seeing a gap in the market for the level of service and strategy provided by digital media agencies and programmatic DM companies, and we are filling that gap by providing industry leading expertise coupled with more focus on strategy and client service.

**Q. What's a company you admire – and why?**

There are so many, and we could never call out just one. But if I had to name a few it would include some of our retail clients like Frances Valentine, Natural Life, Annie Selke, and Serena & Lily. All these brands were started by strong, determined women with a unique sense of style, and an astute understanding of what their customer wanted. This enabled them to create something very special and grow a successful business from the ground up. As a women-led entrepreneurial business at Belardi Wong, we ourselves know how hard this is to do. We look to these brands and the women that created them as visionaries we aspire to.

**Q. What are you reading? What are you watching? Give us the recs!**

I like listening to CBS News where I get lots of quick bites of information. Particularly from CBS business analyst Jill Schlessinger. I think she does a great job highlighting current business and economic trends and breaking it down in terms of what it all means for us moving forward. I also listen to “Jill on Money” her podcast that provides a lot of great insight for managing personal finances.

**Q. What are the three main trends you are watching in 2024?**

1. Increased spending as the economic outlook brightens and the 2024 election is poised to drive record media investment
2. AI impact on content creation, personalization, targeting & measurement
3. Understanding “post-growth marketing” focus – next agency trend

**Q. One word to describe the State of Media as we move into 2024:**

Complex.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Over the last 24 months, we have been working with our client partners to prepare for advertising without cookies. Priority areas of focus have been aimed towards Conversion APIs, UID2.0, curated PMPs, prioritizing First and Zero party data, improving addressability, and enhancing measurement via modeling and attribution.

With testing on Google Chrome limited to single-digit percentage being exposed in Q1, it is unknown how this will impact performance at scale, particularly with remarketing and more complex ad types. Early indicators show that CPM values are perceived to be lower for cookieless inventory, indicating programmatic economics and inventory availability changes will be dynamic. Data from users at scale will be necessary to understand long-term impacts on the sell side and how users



respond to seeing ads that may be perceived as less relevant in publisher environments.

Results are mixed with alternative targeting options. While refinements are continuously being made to replacement options, it is unclear how quickly they will become viable and how they will perform at full scale.

**Q. How will measurement change within the channels or applications you focus on?**

Efficiency will still be important, but clients will start to focus more on holistically understanding how their investments deliver on their growth/share in the market, identifying optimal mix, channel incrementality, and measuring the correlation between attention and creative effectiveness.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

For enterprise marketers, the Adobe stack is evolving rapidly to provide end-to-end solutions from planning, content and ad creation, journey optimization, marketing automation and measurement.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

Their innovation and new opportunities with them for wise media spend and audience penetration.

In a world where not all conversions are created equal, we must remain cautious. As the walled gardens continue to push advertisers towards broader targeting and allowing automation to take the wheel, we will be highly focused on continuing to find the right balance of precision and AI-powered advertising.

As the martech ecosystem has become incredibly fragmented, we will be watching for consolidation in various forms and breakaway inventory sources causing disruption. With Pinterest and Snapchat building social shopping deals with Amazon and Google Ad Manager partnering with X, we expect enhanced ad products to be released quickly. While Amazon Prime moving to an ad-supported model and Apple setting up to launch a DSP, there will be a host of new options for advertisers, which may upend share of spend and focus –similar to the rise of retail media.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

Clients are increasingly seeking integrated answers to growth and commerce questions. As brands seek to bridge the dichotomy between building their brand and driving efficient sales, the model of having separate agencies accountable for brand and performance will continue to dissolve.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

In 2024 we are rolling out our proprietary Branded Omnichannel approach to brand growth fusing branded content with omnichannel and omnimedia ROI marketing so that our clients can focus on true dollar brand growth while building brand equity and, driving conversion in all customer touchpoints. Our current clients are seeing major effectiveness and efficiency benefits using our approach.

**Q. What's a company you admire – and why?**

Nvidia and Shopify are two of my favorites. Nvidia really seems to be mastering next-generation technology, especially around AI computing. Shopify continues its evolution as an amazing CX platform for modern ecommerce and continues to drive tremendous innovation for both middle market and enterprise brands.

**Q. What are you reading? What are you watching? Give us the recs!**

Fluke by Brian Klass and Grit by Angela Duckworth.

**Q. What are the three main trends you are watching in 2024?**

The impact of bots on media and public opinion, especially in this election year.

The surge in privacy-related regulations, from the decline of 3rd party cookies to growing regional consumer rules. This compels marketers, especially slower adopters, to revamp audience outreach strategies.

The maturation of GenAI and its growing influence present both business benefits and risks to operations. Staying attuned to these trends positions us for strategic adaptability in a dynamic landscape.

**Q. One word to describe the State of Media as we move into 2024:**

Transitional.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Client readiness for bidding farewell to third-party cookies in 2024 differs based on company size and digital marketing expertise. Larger brands we collaborate with have long prioritized fortifying first-party data and refining targeting strategies. While some implement advanced methods like server-side tagging, others are still catching up. In the mid-market and among smaller companies, preparedness varies, with some lacking awareness.

Depending on the industry and internal digital marketing proficiency, there are those well-prepared and others who may need guidance in navigating this significant shift.

**CHEQ**

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

One AI application deserving of attention is GenAI tools utilizing company websites for AI model training. While businesses assess efficiency gains versus confidentiality risks, blindspots exist regarding other potential threats. GenAI tools have democratized the launch of competitive and security threats, exposing companies to evolving vulnerabilities. Balancing the pros and cons is crucial as AI transforms operations, emphasizing the need for a comprehensive understanding of opportunities and risks in this dynamic landscape.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

Protecting both performance and privacy for clients that leverage them.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

What's incredibly clear, even this early in the year, is that privacy, data collection/protection, and go-to-market security threats will increasingly challenge just about every marketer and company.

Marketers will need to find new ways to effectively engage audiences with much more transparency, adherence to varying privacy preferences and regulations, and more awareness of the risk exposure they can introduce. There will be more friction than ever between marketers and other departments whose primary responsibilities are to monitor and reduce risk for the business like legal, infosec, and IT –functions that are seldom versed in the intricacies of marketing today and often impose unnecessarily limiting policies as a result.

So, what's the good news? It's possible to prioritize performance, privacy, and security. With better education, technology, and collaboration across departments, there doesn't have to be a trade-off. Some companies are already there, but it's a small group of innovators. At CHEQ, we're excited for this to become more of the norm in 2024.

**Q. One word to describe the State of Media as we move into 2024:**

Exciting.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

If there is one constant with digital advertising, it's change. The majority of our clients work with local advertisers and our technology is not cookie-dependent, so we have confidence in our ability to help our partners thrive in this new reality.

The Frequency platform utilizes a dynamic model of targeting that relies on hundreds of signals, in addition to the third-party cookie. This model includes contextual, behavioral and predictive modeling, and allows us to seamlessly blend third-party data in as well as out of campaigns without sacrificing performance.

Additionally, we're testing a number of cookie replacement technologies, including TTD Unified ID 2.0 and the Google Privacy Sandbox. As the deadline for Google's cookie deprecation policy in 2025

approaches, we will be prepared to implement all of the solutions available to maintain the current product capabilities.

The transition into a cookieless future may not be an easy one, especially for local-market advertisers, media companies, and small to mid-size agencies –all of whom may not have the access to extensive data pools or the resources to analyze and act upon that data.

The future of media might be one without cookies, but with Frequency's customizable, scalable advertising automation, it's a future that advertisers and media companies need not fear.





### **Q. How will measurement change within the channels or applications you focus on?**

We're particularly focused on TV in 2024. As viewership habits change, advertiser strategy and tactics need to adapt accordingly. People are cutting the cord and consuming content across multiple screens. This is why programmatic CTV buying is highly beneficial, because you're buying across multiple apps and platforms to reach your audience. In order to reach them in this new environment, advertisers have to grapple with new technologies and complexity. People tasked with selling advertising need tools to help them manage that complexity.

Broadcasters and cable providers are seeing the shift to CTV, and they're doing everything they can to enable their sales teams to match that viewership as it shifts. Other traditional media companies that aren't used to selling video are jumping in for the first time, and now they're able to sell television.

### **Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

Despite the current popular obsession over new AI tools like ChatGPT, artificial intelligence is already a part of our daily lives. A wide range of industries currently use AI to improve efficiency and accuracy, automate tasks, and create new opportunities across different functions.

When you see an ad on Facebook or Instagram that perfectly matches your interests, you might assume it's just a coincidence. However, that ad is likely the result of AI algorithms that analyze your behavior, interests, and preferences. Advertisers use AI-powered tools to collect data about your online activities, including your search history, social media activity, and previous purchases. They then use this data to create highly targeted ads that are more likely to grab your attention and result in a conversion.

AI will only become more prevalent in the future, even as it becomes less immediately visible through thoughtful design. While there is still some skepticism about the impact of AI on society and the economy, there's no denying that AI has the potential to transform our industry. As we continue to develop and refine AI technology, we can expect to see even more exciting and innovative applications across business verticals and functions. The state of technology is never static, and the currently unfolding AI revolution promises to revolutionize the human experience much as other digital technologies have in recent years.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

Political ad spend will be back in the picture in 2024, and it will put some pressure on the economics for local advertisers, pushing prices up. It won't change the benefit or importance of taking an omnichannel approach. Four years ago, the political cycle put some pressure on local-market ad prices, but not as much as it will this year.

With an omnichannel approach, advertisers can be flexible about their spend between channels. For local-market media companies, they own that relationship. Local advertisers want to interact with a single expert for all of their needs, so for local-market media companies, being able to own that relationship and offer omnichannel campaigns puts them in a very good position.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

The Frequence story continues to evolve, and so has our ability to tell our story. Along with educating potential new customers about Frequence, we're constantly offering valuable content to our current partners, helping them maximize the platform and updating them on the latest developments in omnichannel advertising. 2024 will be an exciting year for us, as we launch new platform functionality and look to expand our target audiences.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

2024 is an election year, and we're rolling out a programmatic political advertising tool for our media company partners and their advertisers. We're also developing an AI-powered tool to help streamline the production of video creative for local-market advertisers, as well as accelerating our international expansion.

**Q. What's a company you admire – and why?**

I really admire Apple because of its innovation and disruption in many different industries. They've had a fascinating history, and it will be interesting to see what their future holds.

**Q. What are you reading? What are you watching? Give us the recs!**

I'm currently reading Daniel Coyle's *The Culture Code*. It's a fantastic read to learn about corporate culture mistakes, opportunities, and learnings!

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JEFF RAGGOVIN, CEO

## Q. What are the main trends you are watching in 2024?

**Privacy Focused Marketing:** Finally, with the phasing out of third-party cookies and increasing concerns about privacy, marketers are likely to focus more on privacy-centric marketing strategies. This includes adopting technologies and approaches that respect user privacy while still delivering personalized and relevant content. Contextual is once again king.

**Contextual Targeting:** Contextual targeting, where ads are placed based on the content of the webpage rather than individual user behavior, will gain prominence. This approach allows marketers to reach audiences based on the context of the content they are consuming, rather than relying on user-specific tracking.

**First-Party Data Utilization:** Many big companies have still not adopted proper first-party data collection. It will be paramount for them to focus on this for the future.

**Build Direct Relationships Now:** As third-party cookies phase out, companies will prioritize establishing direct relationships with their customers. This involves creating touchpoints and interactions that encourage users to willingly share their information. This might be through loyalty programs, newsletters, exclusive content, or other value-added services.

**Data Accuracy and Reliability:** Unlike third-party data, which may be obtained from various sources and can be less accurate, first-party data is collected directly from users. This enhances the accuracy and reliability of the information, allowing for better-informed decision-making in marketing efforts.



Fyllo™  
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**Compliance with Privacy Regulations:** With privacy concerns on the rise and the implementation of regulations like GDPR and CCPA, relying on first-party data ensures better compliance. Since users willingly provide this data and have more control over how it's used, companies are less likely to run afoul of privacy regulations.

**Mitigating the Impact of Cookie Deprecation:** With major browsers phasing out support for third-party cookies, companies that heavily relied on these tracking mechanisms will need to pivot. Investing in first-party data allows for a smoother transition, ensuring that businesses can continue to deliver personalized experiences and targeted advertising.

**Q. One word to describe the State of Media as we move into 2024:**  
Compliant!

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Please see Fylo|Semasio's report: Navigating the Privacy-First Landscape. In our survey, which we did in late 2023, we found that senior leaders in digital marketing feel confident of their current solutions and well prepared for the future, while more junior executives have more reservations. The survey respondents broadly expect that future solutions, including contextual, will be less effective than their current cookie-based audience targeting, but are regardless preparing to increase resources and ad spend as they plan.

**Q. How will measurement change within the channels or applications you focus on?**

As the addressability of the broader internet continues to decrease, measurement solutions that rely on accurately matching an ad exposure to a converting user will become less and less effective. This will make it more difficult for brands to understand the full impact of their media and will also make it more difficult to assess the performance of individual tactics, channels or campaigns. Brands will need to pivot to non-identity based measurement frameworks (think matched market lift tests, inferential statistics on media and channel mix) in order to establish baselines for what performance looks like in a cookieless ecosystem.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

I think one of the most useful applications of AI in marketing is “Personalization.” AI enables marketers to analyze vast amounts of data to understand individual customer preferences, behaviors, and patterns. This information is then used to tailor marketing messages, content, and experiences on a highly personalized level. Personalization powered by AI enhances customer engagement, increases the relevance of marketing efforts, and ultimately contributes to improved customer satisfaction and loyalty.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

All of the major players in the ad tech space will have some form of internal solution for identity. Our focus is actually more on solutions (like the measurement solutions I mentioned above) that are agnostic to “walled garden” identity frameworks. This allows us to provide brands with a more comprehensive, less-siloed view into how different channels are performing and how to best optimize media and budget mixes.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

We have shifted out of cannabis and into mainstream to focus on a privacy-first world. We are now a data-driven marketing ad tech stack that specializes in audience targeting and segmentation. We use advanced technologies and data analytics to help marketers reach specific audiences with their advertising campaigns wherever they buy their media.

We collect billions of pages a month and analyze large amounts of data to create detailed audience segments. These segments are then used to target advertising to specific groups of users based on their demographics, interests, and behaviors.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We are most excited about pushing our clients to adopt and transcend contextual targeting to get super tight into niches without having to use data. Contextual advertising is considered exciting for several reasons, particularly

in the current landscape where privacy concerns and changes in data tracking mechanisms are reshaping the digital marketing industry. Here are some reasons why contextual advertising is generating excitement:

**Privacy Compliance:** Contextual advertising relies on the context of the content being consumed rather than individual user data. This approach aligns with increasing privacy regulations and moves away from reliance on third-party cookies, ensuring better compliance with privacy standards.

**User-Friendly and Non-Intrusive:** Contextual advertising is less invasive compared to personalized advertising that relies on individual user tracking. It delivers relevant ads based on the content a user is currently engaged with, creating a more seamless and non-disruptive user experience.

**Content Relevance:** Contextual advertising ensures that ads are relevant to the content a user is viewing, increasing the likelihood of engagement. This relevance can enhance the overall user experience and contribute to a more positive perception of advertising.

**Brand Safety:** Contextual targeting allows advertisers to have more control over where their ads appear. This helps in maintaining brand safety by avoiding association with inappropriate or sensitive content that might be harmful to a brand's image.

### **Q. What's a company you admire – and why?**

The Trade Desk because of their Open Platform Approach. The Trade Desk operates on an open platform, allowing advertisers to integrate with various data sources, third-party tools, and measurement solutions. This flexibility is appreciated by advertisers looking for customization and integration options.

### **Q. What are you reading? What are you watching? Give us the recs!**

I've been reading 'Dopamine Nation' by Anna Lembke (highly recommend it), and this line stopped me: "The smartphone is the modern-day hypodermic needle, delivering digital dopamine 24/7 for a wired generation."

**Q. What are the three main trends you are watching in 2024?**

**Heather:** The industry is really rallying around efficiency, responsibility, and brand safety – and partnerships are being evaluated alongside this criteria. We're seeing this in practice through SPO, with both the publisher and agency side cutting down the number of partners they're working with as well as more thoughtful choices around which partnerships deserve an investment. For instance, we're seeing so many brands pull out of Twitter/X because they may feel it's not in line with industry themes of responsibility and brand safety.

**Q. One word to describe the State of Media as we move into 2024:**

**Bob:** Fractured. Media is fractured, you don't get your newspaper or nightly news anymore as your only source of information. Now you have to review multiple sources to fact check whether that news actually lines up. As a media provider, the added challenge around a fractured media environment is that you have to produce much more content, in so many forms and on so many platforms in order to remain relevant. There have been a lot of discussions around linear, but nothing really goes away. Print is not gone even though you'd think it would be dead by now. Audio is not gone, but is evolving into multiple content types like podcasts, satellite, and streaming. Everything has fractured.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

**Bob:** 80% of the industry is not prepared. It's a game of timing, because you don't want to be so far in the front of the industry that you are the one testing. You also don't want to be lagging behind. You don't want to move forward too fast, and you also don't want to move too slow, so there is really no clear answer.



**MADTECH**



**Heather:** The fact is that regulation is going to push this forward no matter what, so at the end of the day your organization has to change, no matter what Google says or not.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

**Heather:** We are working with these platforms to help ease platform-to-platform interoperability. We want to become a solution for our clients and work with them on partnerships that make integrations into their platforms easier.

**Q. How has marketing and communications changed for your company in recent years - and how will that project into 2024?**

**Heather:** From a MadTech standpoint, we have always allocated our budgets toward networking events and bringing people together. What I would like to see from our company in 2024 is a continuation of that, and also establishing more POVs. We have a lot of smart people on our team, and having a stronger point of view in educating our clients will go a long way.

**Bob:** I think we are going to be a lot more tailored to executives from a communication standpoint. We are a product led consultancy, and what we are seeing is that we are helping evolve companies to be product led. We aren't there for a targeted quick engagement, but rather to help their holistic transformation process. We help them from going-to-market, to operations, as well as evaluating how their products impact all other areas of the business.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

**Heather:** Everyone should be re-evaluating their product, tech, infrastructure, and future proofing to identify gaps. That's where we can help drive change through transformation.

**Q. What's a company you admire – and why?**

**Bob:** I admire Pubmatic. Their evolution has been really interesting.

**Q. What are you reading? What are you watching? Give us the recs!**

**Heather:** U og Digital, it's the best newsletter you're going to get. I also love Brian Morrissey, he's a really smart writer and I read all of his pieces.

**Q. What are the three main trends you are watching in 2024?**

There are so many interesting trends to watch in ad tech heading into next year. If I had to pick three, I'd say Supply Path Optimization (SPO), Privacy, and Contextual in CTV.

**Q. One word to describe the State of Media as we move into 2024:**

In flux (I know... it's two words).

You have all of the dynamics in play that I just mentioned: SPO, privacy, and so forth. On top of that, the lines between CTV and traditional TV continue to blur. And it's also going to be a big year for political ad spend with the 2024 elections. There are just so many dynamics in play that we expect 2024 to be another year where the state of media is in flux.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

Across the advertising industry, advertisers and online publishers are at varying degrees of preparedness for the deprecation of third-party browser cookies. Over the past few years, we've seen a lot of experimentation and innovation. The rise of alternative IDs is one big example. But there is likely still some fallout that won't be seen until cookies truly go away. Cross-channel measurement and exposure tracking is one area that could be facing unforeseen consequences.

**Q. How will measurement change within the channels or applications you focus on?**

Within CTV and TV, there's a lot of focus on incrementality and attribution right now. Media buyers want to know whether the reach they are getting on CTV is



additive to their linear TV campaigns (and vice versa). Nested within this is a desire to understand how media dollars are working toward achieving a certain outcome, such as store visit or online sale.

Tracking these types of outcomes across screens may become a bit more difficult with signal loss, so we'll likely see some innovation in this area along with a shift toward more probabilistic measurement techniques. Overall, we expect CTV to continue evolving into a highly-accountable medium for performance advertisers in 2024.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

There's been a really interesting infusion of contextual targeting and AI this year that is definitely worth keeping an eye on. As an illustration, the Alliance for Video-Level Contextual Advertising (AVCA) released research this past October showing that, when enriched with AI, contextual targeting solutions become really strong drivers of core branding KPIs and consumer attention. AI and contextual are areas where we expect to see a lot of innovation and additional research in 2024.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc.)?**

There's two key areas I'm really interested in when it comes to the major tech platforms.

First, how will they make their first-party data available to brands for ad targeting and measurement? Walled gardens have a highly valuable asset in their first-party data, and brands would certainly benefit from wider access to this information to orient their campaigns.

Second, a lot of the major tech platforms are also major CTV players. Google has YouTube TV. Amazon has Prime Video and FreeVee. Netflix has opened up an ad-supported model. And Apple looks set to do the same. These companies all have the capacity to drive a lot of interesting changes in the space –across content portfolios, creative experiences, advertising models, and so forth.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

There's been so much innovation in the TV and CTV ad market over the past few years. In the early innings of any innovation curve, marketing strategies typically

focus on articulating the potential of what a certain piece of technology can unlock. As technology starts to gain buy-in and business cases are shaped, those marketing strategies move from conceptual frameworks to more evidence-based narratives.

And that's very much been true of the CTV ad market as a whole and our marketing and communication strategies in particular. We've put real emphasis on understanding our users and clients' challenges, aiming to demonstrate how all of this innovative technology can make their lives easier.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We're really excited about the continued rise of deal curation within the programmatic space, across both the demand- and supply-side. In November 2023, we introduced our new self-serve deal ID curation platform for CTV, Beachfront Select, and it has since been met with such positive industry feedback.

We work with a lot of savvy programmatic buyers who are eager to get closer to supply for all of the benefits that it brings: higher match rates, clearer signals, more transparency, and so forth. And so, through Select, we're excited to continue creating frictionless curation and activation pathways for our publisher partners and the agencies that we work with.

**Q. What's a company you admire – and why?**

I'd say Wurl. They sit at such an interesting intersection within the CTV ad tech market, and are doing some really fascinating work to blend contextual targeting with creative resonance.

If you think about it from a viewer's perspective, when you sit down to watch an ad-supported CTV show, you're typically in a certain mindset. You might watch a comedy if you're feeling happy (or even stressed and need a laugh), or a reality TV show if you need to unwind and turn your brain off.

Ensuring that the ad creatives delivered within those environments match the tonality of the show (and even the mood you're in) is really critical for driving resonance. This is an area where I think we'll see a lot of advancement over the next year.

**Q. What are you reading? What are you watching? Give us the recs!**

Outside of the Buffalo Bills push for the playoffs, I've been watching the new season of *Reacher* on Amazon Prime! *The Bear* on Hulu and the Live Action remake of the *Squid Games* were also great TV over the holiday break.

In terms of books, *Ready Player One* is one of my all time favorites, so I recently picked up *Ready Player Two*.

**Q. What are the three main trends you are watching in 2024?**

We will build off of CTV growth in 2023. There will be a spotlight on adding more transparency around CTV data so that advertisers can reach audiences effectively.

Big companies will come under a lot of fire. There will be a lot of talk around antitrust as Google starts to put the squeeze on cookies. The Trade Desk got out of their sandbox environment. It's interesting because even if you look at Epic Games, they won their lawsuit against Google for antitrust, which was a jury that found them guilty vs a judge for the Apple case. Public opinion is on the side of individual companies.

Retail Media –people will look to spend more with RMNs as cookies go away, and other companies will rely on data of their own. Expect new product launches from the RMNs in 2024.

**Q. One word to describe the State of Media as we move into 2024:**

Rebounding.

**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

No, clients are not ready. People have a plan but the plan has yet to be tested.

**Q. How will measurement change within the channels or applications you focus on?**

Measurement will change because with the depreciation of IDs, it will become more fragmented – attribution will get worse. We haven't been able to solve for measurement across the industry. People will start to focus more on audience measurement and understand more about the value of audiences because of ID instability.



**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

Mediawallah uses ChatGPT within engineering and data science. People will continue to use AI to become more productive. We will start to see AI affecting businesses more in terms of throughput and what companies can actually get out into the market. We will see higher product turnover because teams will be able to innovate much more quickly. ChatGPT can spit out a code and you just need to Q&A it; things move more quickly.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

We're focused on the data needed to be able to understand how users interact with these platforms as well as the open web. We are focused on giving companies identity data so that they can resolve what they are doing across the major platforms across the open web.

**Q. How has marketing and communications changed for your company in recent years - and how will that project into 2024?**

We moved from stealth mode into a more public phase where we have more thought leadership within the market.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

We are interested in companies like Snowflake that are using composable technology to build things themselves and we've invested a lot of effort into making our solutions available in different environments so we can be part of that new evolution.

**Q. What's a company you admire – and why?**

I look at companies like MTV and Nike –back at the time when Air Jordans were launched– that have true innovation that taps into and defines the culture of the times. Maybe ChatGPT could be inspiring, if OpenAI is careful with their power to continue positive growth. A company like this is able to push the envelope of innovation in a positive way and should be admired.

**Q. What are you reading? What are you watching? Give us the recs!**

I read the trades! Recently I've started to watch For All Mankind on AppleTV. It's about space exploration but they mix fact with fiction, so Ted Kennedy is president, and they landed on the Moon on the way to Mars. It provides an alternative but realistic history that focuses on innovation, politics, all the interesting stuff.



**Q. What are the three main trends you are watching in 2024?**

The first is the natural progression of Generative AI from imagery to video. Today, Generative AI for video still leaves a lot to be desired, but I think this will change in 2024. Second, I think we're going to see accelerating adoption of creative data technology across the marketing ecosystem, particularly with agencies and measurement providers. Agencies are realizing that creative data-driven inputs are going to be key to generating unique, performant content, and are integrating systems to make production more intelligent. Measurement providers are also waking up to the fact that reports which assume all creative is the same have a fundamental flaw. Integrating creative data into their models will make those same models far more valuable to marketers. Finally, I think we're going to see the collapse of the hybrid work model. People across industries are realizing that in-person interactions are more productive and better for businesses and employees alike. Working by the end of 2024 will look a lot more like working in 2021.

**Q. One word to describe the State of Media as we move into 2024:**

Transitioning. AI is already touching all aspects of media, and that will accelerate in 2024. Black-box solutions like Performance Max and Advantage+ are on the rise, but their shortcomings for marketers will start to become more apparent as many competing marketers start using the same tools to try to drive similar results. The pace of change will only accelerate going forward, so don't think of this as a transition into a new form of stability.





**Q. 2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

I think people are certainly ready to stop talking about the impending demise of third-party cookies. Most clients are ready, or moving towards readiness. When the switch happens, it will further the dollar shift to platforms that either close the loop fully, or have sufficiently advanced technology to do probabilistic attribution effectively enough that it can be trusted and planned against.

**Q. How will measurement change within the channels or applications you focus on?**

The big change will be the continued rise of creative measurement. The industry has spent the past decade plus with near total focus on media measurement, but we've cleared that level now. There's not much incremental value left to squeeze out, especially with cookie changes. Creative measurement opens up a whole new world of opportunity to drive performance, learn about customers, etc. As media works less hard, creative will have to carry more of the load, and measurement is the first step in that change.

**Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

In our world, what we're particularly interested in right now are training systems that help us understand creative context in a more human way. Previously we might have broken down creative assets into elements, but had a blind spot to more strategic aspects of communications. Now those barriers are eroding, and as the ability for AI to understand the whole creative aperture expands, it opens up new possibilities for measurement and insight.

**Q. What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

We're focused on supporting our partners at all the major tech platforms as best as possible. Generative AI is moving us from a world of content scarcity to a world of content abundance. This could easily flood the big tech platforms with a ton of content that feels kind of similar and doesn't drive marketing results. We see our main task as helping marketers build the critical creative data assets needed in order to ensure that the content they are creating (whether generatively or in more traditional ways) does more than just fill the pipes, but drives results. If we succeed in that we'll be helping our partners at the major tech platforms, who care equally about marketer success.

**Q. How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

The big change for us is just one of focus. We are laser-focused on enterprise marketers and the agencies that support them. As we've narrowed down on who we're building technology to serve, that has allowed our marketing and communications strategy to get similarly focused. We're doing more public speaking in partnership with our clients, who are achieving great results with creative data and want to tell those stories to the industry. I suspect this will continue, with a growing focus on the measured value that was created as a result of leaning into these AI creative performance tools.

**Q. What is your company most excited about in 2024? Go ahead and plug yourself!**

More than ever in the past, we're most excited about our product. Vidmob is in an interesting position as the largest cross-platform creative data asset in the industry. The pace at which we've been able to build off of this to bring value to our clients has accelerated dramatically with recent advances in AI. The insights and scoring capabilities from our technology have always driven massive value for our clients, but it's all getting much more accessible now, which is enabling us to help connect more parts of their overall content supply chain. 2024 is going to be a year of rapid product expansion for us, and I can't wait to share it all with our users.

**Q. What's a company you admire – and why?**

I admire every young technology company that has gone through the last couple of years, as the environment has shifted from a growth-at-all-costs mindset to a focus on profitability. Speaking to friends across the industry, I know how hard this has been on management teams and employees everywhere. But the resilience and sheer stubbornness shown by so many people is amazing, and it's hard not to admire everyone who made their way through this tectonic shift and achieved a healthier operating state in this new environment.

**Q. What are you reading? What are you watching? Give us the recs!**

I just finished reading *Less* by Andrew Sean Greer, and *The Master and His Emissary*. The first was a love story that also deals with aging, really a beautiful book. The second is about the bi-cameral nature of the brain, why it's structured that way, and how that impacts society. I also recently read *Amp It Up*, by Frank Sloopman, and I, and the rest of the Vidmob team, are excited to amp it up in 2024!

**Q. What are the three main trends you are watching in 2024?**

As a communications firm, we track a broad and diverse set of themes which inform our work with clients - and those are borne out in their responses to the same question. So for the purposes of this answer, I thought I'd zero in on themes that impact our work as communications professionals.

**Challenges in the News Industry:** The news sector is facing significant headwinds. Notable outlets like *BuzzFeed*, *Vice*, and *Sports Illustrated* have ceased operations, and others like *Adweek*, *Insider*, and *NPR* have reduced their staff by 10%. A struggling news sector leads to greater instability, high turnover rates, and strained, inexperienced staff. This directly impacts how we carry out our communications programs.

**Rise of Made for PR (MFPR)**

**Sites:** The phenomenon of Made For Advertising (MFA) sites, a major concern for the industry of late, is now paralleled by the emergence of MFPR sites. Operating in the guise of trade publications, these sites facilitate a practice known as astroturfing, where branded content is disguised as independent third-party material. PR hits and byline placements are easy, because there is no real journalist or editor behind them. Such practices are increasingly prevalent in our industry, muddying the waters for real PR practitioners.

**Publications vs. AI:** A key trend is the legal battle between major players like *The New York Times* and OpenAI over the copyright questions raised by training AI models on proprietary content. The resolution of this dispute could, if brought to courts, set a foundational precedent for content



creators in the AI era. Moreover, there's a broader concern about AI-driven search engines, such as Google's SGE, which could significantly affect web traffic.

### **One word to describe the State of Media as we move into 2024:**

*Existential.* It might sound dramatic, but the recent spate of layoffs and closures among agencies and publishers says otherwise.

### **2024 will say goodbye to third-party browser cookies. Are your clients (brands, agencies, publishers, data companies) ready? What is still up in the air?**

The short answer is: yes. At Broadsheet, many of our clients are major players in helping the ecosystem transition to a new foundation for media exchange. Their capabilities span a number of areas:

- **Identity Solutions**, which form the critical backbone of addressability based on first-party data.
- **Contextual Strategies:** The phasing out of cookies has reignited interest in contextual strategies.
- **Probabilistic Models:** Custom probabilistic targeting and bidding models have emerged as a significant new category, reshaping how targeting is approached in the absence of cookies.
- **Creative Focus:** Marketers are increasingly viewing creative content as a crucial element for enhancing campaign performance.

### **Q. How will measurement change within the channels or applications you focus on?**

PR measurement is always a sticking point and remains more art than science. While total impressions, share of voice and "ad value equivalency" are frequently cited, none has been able to capture the nuanced reality of PR success. KPIs are different depending on the client and campaign; it could be a question of influence, change, trust, a shaping of the narrative, or even keeping your client out of the news. For a long time measurement has been qualitative, manual, and case-by-case, and it remains so today. AI has not changed that just yet, but it's only a matter of time, and that time is likely fast approaching.

### **Q. AI is transforming everything. What is one application of AI that you think deserves particular attention?**

LLMs are often treated as tools for completing tasks. You tell it what to do and it does it, to varying degrees of success. In my experience that doesn't quite harness AI's most useful capability. In my practice, I turn to ChatGPT for conversation and brainstorming. Brainstorming is a fundamental part of our work, forming the essence of our creative process with clients. LLMs are great for posing questions, exploring different viewpoints on a topic, and seeking background information and context –all of this before asking them to complete a task.

### **What are you focused on when it comes to the major tech platforms (Google, Facebook, Amazon, etc)?**

- **Regulation:** High-profile cases such as Google versus the Department of Justice, debates surrounding the Cookie Consent Management in the UK, and the *New York Times'* litigation against OpenAI encapsulate broader concerns about the immense power these platforms wield.
- **Video Convergence:** The once-clear lines between digital video, social video, streaming and linear are blurring, and the platforms are huge drivers of that trend.
- **Political Ad Dollars:** Twitter, Facebook, Amazon, and Google each have their unique policies with respect to political ad dollars, balancing revenue goals with social responsibility.

### **How has marketing and communications changed for your company in recent years – and how will that project into 2024?**

Like everyone, AI has already transformed how we operate and also how we think about our role. This selection from our 2023 AI report said it best: "As the media becomes more automated, comms need to become less so. With more AI-generated content, breaking through the noise becomes a more skillful practice, requiring a nuanced touch. We need more thoughtful and strategic approaches and more bespoke offerings. The work of truly earning media requires more human intelligence than ever before."

### **What is your company most excited about in 2024? Go ahead and plug yourself!**

The best part of our job is learning from our clients. This report is just one manifestation of how we make that a more integral part of what we do.

### **What's a company you admire – and why?**

We are big fans of Marketecture and The Rebooting. Both are examples of

former editors (Zach Rodgers from AdExchanger and Brian Morrissey of Digiday, respectively) who have kept on doing what they do best, each with a media product that brings out their greatest strengths.

**What are you reading? What are you watching? Give us the recs!**

Dune! Yes, because the blockbuster Hollywood movie is coming out in a few weeks. But mostly because Dune's universe offers one of the most intelligent renderings of the consequences of artificial intelligence. Dune is set centuries after humankind left AI behind, creating a world where competitive edge derives not from technology but from human skill and ingenuity. Heady stuff for heady times.

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