WPP Media

ADVERTISING IN 2030

September 2025

ADVERTISING IN 2030

Introduction

Marketers love looking forward to the future, trying to figure out what's next. In fact, it's a business imperative to keep up with and get ahead of technological and consumer trends. At the same time, it's hard enough to predict accurately what will happen within the year, much less what will happen five or ten years from now.

Consider that as recently as 2022, dominant streaming services seemed intent on not switching to ad-supported models. Three years later, they all offer ad-supported tiers. Or take the humble QR code. First invented in 1994, it gained widespread acceptance in Japan in the early 2000s. Marketers and tech companies in the U.S. made multiple attempts at pushing usage, but interest seemed to be waning by the start of this decade. And then COVID-19 hit, causing not only a resurgence in interest, but the sort of mass adoption that everyone had given up on.

One of the foundational questions that we asked when we first launched Advertising in 2030 back in 2020, was: Do leading decision makers and experts in our own field even believe advertising will continue to exist in ten years' time? While most agreed that it would, none of them (or us) could have seen the pandemic bearing down on us even as the results were being collected and published. The pandemic upended normal routines and accelerated trends like e-commerce, last-mile delivery, and streaming TV. We ended up running the survey again a year later in 2021 to better understand COVID's impacts.

Four years later, we've done it again, asking a non-random sample of more than 60 industry experts to rate the likelihood of 20 scenarios by the year 2030. We also asked for their reasoning behind the score. The research was carried out from April 1 – April 30, 2025.

We can see how our expert respondents (some returning, some new) view the evolving picture of media, tech, and commerce in 2030.

Where things have changed

One of the most striking changes has been the increased confidence in generative AI as a creative tool. Striking, but not necessarily surprising considering the advances in AI just in the last few years.

At the same time, the expected role of virtual reality in our lives has waned some as the metaverse hasn't caught on to the extent that promoters said it would, and consumers have yet to fully embrace VR and AR technology currently on offer. And while people now increasingly rely on virtual forms of communication and collaboration in the workplace, many companies have brought employees back to the office and back to in-person interactions.

Another striking difference is the perceived importance of sustainability to consumers.

In 2020, our experts were extremely confident about the impact of the environment on purchase decisions, predicting that consumers would consider it on par with price. We wrote at the time, that "brand purpose, especially as it relates to sustainability, will need to permeate every aspect of a company, not just its marketing. Consumers will become adept at gauging the authenticity of interactions they have with a brand, perhaps helped along by the implementation of standard metrics like those we see on nutrition labels today which could quantify the 'cost' of not only production but advertising as well."

But consumers and marketers both seem to be moving on. On the consumer side, it can be attributed to cultural realignment in markets like the U.S., as well as increasing price sensitivity in an era of global trade actions and extreme weather events. Marketers are not only following consumer interest (or lack thereof) in the topic, but in markets like Europe have grown increasingly wary of greenwashing accusations. The rush to use AI adds to the considerations as the technology can offer efficiencies and cost savings across marketing and other activities, but media scrutiny regarding the energy resources required for AI data centers is on the rise. Until and unless the companies providing AI tools and services can transition to cleaner forms of energy, the prevalence of environmental impact in brand and consumer touchpoints may remain subdued.

While still optimistic about the world in 2030, our respondents' optimism is now tempered with a little more pragmatism. The expert outlook for 2030, viewed through the lens of the past five years, suggests a future where technological integration, particularly involving biometrics and AI assistance, continues its advance. It will be a world of bot-to-bot marketing and more personalization. One in which the carving up of regionally or ideologically aligned blocs permeates regulatory affairs and we move farther away from a single, global approach to consumer privacy and identity. And one where they're a little more skeptical of permanent shifts in consumer behavior, particularly when it comes to prioritizing ideals over price.

How likely are the following statements to be true in 2030?

Biometric data is widely used to access, personalize and secure services

Companies rely on artificial intelligence to produce the majority of creative content

Most interaction between brands and consumers is bot-to-bot (e.g. personal agent to brand bot)

Everything is personalized, including via medical and/or genetic data

The majority of news consumption is of 'creators,' citizen journalists and AI-generated bots

Today's leading digital platforms and social media companies remain as consolidated entities

Governments and corporations have vast or total access to biomentric, GPS and behavioral data

Most people use social media privately. Public social spaces are mainly promotional content

Most (>50%) of the 'users' on social platforms are AI-generated personae

Transit and transportation advertising (incl. self-driving cars) surpasses 10% of total ad revenue

People spend more time interacting with virtual worlds than the physical one

Most products and services are purchased as part of individual or bundled subscriptions

A reduction in working hours and wages due to AI lowers consumer purchasing power

Micropayments are a meaningful alternative to subscription and advertising revenue for publishers

Environmental impact is as important as price in consumer purchase decision making

Consumers have embraced 3D printed alternatives to mass-produced products

Sales of AR glasses, VR headsets and smart earbuds outweigh sales of smartphones and watches

More than 5% of households globally have humanoid robots

It is easy for individual consumers to eliminate all exposure to advertising from their daily lives

A single global approach to consumer privacy and identity has replaced regional regulatory rules

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Highly Unlikely   ■ Unlikely   ■ Likely   ■ Highly Likely

Source: WPP Media

WPP Media

Data & Privacy

The availability and security of personal data are seen as increasing drivers of marketing personalization, helped by advances in generative AI. But the divergence of regulatory approaches to data means that

unified standards are highly unlikely even by 2030.

01

Biometric data is standardized and commoditized to the extent that it is widely used to access, personalize, and/or secure data and services.

A significant majority of experts (51 out of 62, or 82.3%) view this scenario as likely by 2030, with a notable portion (43.5%) considering it highly likely. Many respondents pointed out that this is already happening: Biometric data is already used in phones, banking, and travel. That convenience and security is likely to continue the trend.

"Users want security to be easy. Bio markers are unique, and faster to use than passwords, key cards, etc."

Joshua Spanier
Google's VP of Marketing

However, some caution that standardization might be difficult globally, and usage might vary by market and application. "Based on the comfort people have with facial biometrics currently, as tech evolves and ease of use gets wider it will be widely adopted," said **Pat Crowley of Commonwealth Bank of Australia**. But "privacy will be a large blocker of use of biometrics in marketing. Consent will be mandatory."

02

Everything is personalized to individuals based on chosen settings, historical data, and other sources — including genetic and medical information.

Experts broadly view this as likely (38 out of 62, or 61.3%), though this is a smaller share than in our 2020 survey.

> "This is a given, in spite of the protests people will offer when asked about it. But this is one of those trends that isn't going away, partly due to the seductive nature of the new services it will power and partly because of the sophistication of knowledge it requires to fight it, if one chose to."

Brian Cooley
Cooley Insights

> "With the advancements of AI, you won't even know it's happening. Companies will find it much easier to do than historically, and it will help them better manage their time and content consumption."

Norm Johnston
News Corp

Taking it a step farther, **WPP Media's James Hier** said tailored content and experiences "will be personalized to your AI agent."

Personalization has also been a consistent way for CEOs to signal their use of AI across the business. Companies from eBay to Netflix have touted the benefits of personalization for their customers. During a Morgan Stanley conference earlier this year, Netflix CFO Spencer Neumann spoke about using generative AI to improve product discovery, promotional assets, and conversational search to surface the "best fit" title for a specific person at a particular in time.

While personalization based on historical data and settings is expected to increase, driven by AI, the use of sensitive genetic and medical data will run up against privacy regulations, consumer resistance, and data silos.

But it's not time to write obituaries for mass-marketing. There's "not always a case for the extra costs of personalization," said **Richard Kramer of Arete Research**, adding that things like "brand launches don't need to be personalized to win share of voice."

03

Governments and corporations have vast or total access to information about who people are (DNA and biometric data), what they do (GPS and communication data), and what they think/believe (search data, listening devices).

Experts lean towards this being likely (34 out of 62, or 54.8%), with a significant group (13 out of 62, or 21.0%) seeing it as highly likely. Many believe this is already happening to a large extent, driven by technology and data collection infrastructure. However, there's skepticism about "total" access due to data silos, encryption, varying regulations (especially outside authoritarian states), and potential consumer and regulatory pushback on privacy grounds, particularly concerning medical and genetic data as well as sensitivity around listening devices.

"The collection infrastructure is already in place and, given the bent towards authoritarian governments, the protections against the misuse of that data is slipping. Now whether governments can make sense of all that data is a different topic altogether."

Anonymous

"Most governments will lean towards having more data. But encryption technology may exceed their ability to force back doors."

Anonymous

04

**A single global approach to consumer privacy and identity has replaced regional regulatory approaches.**

This is where the rose-colored glasses really come off. Experts overwhelmingly view this as highly unlikely (47 out of 62, or 75.8%, rated it 1-2 out of 10). The primary reasons cited are geopolitical fragmentation, differing cultural attitudes towards privacy, the slow pace of legislative agreement, and the lack of commercial interest from dominant platforms in standardization.

"Zero percent chance."

Dan Salmon
New Street Research

"The odds of the EU, the UK, the USA, China, India, and Africa setting global standards is remote. It's about as likely as an Alphabet, Meta, Apple, ByteDance consortium."

Rob Norman
Advisor and Board Director
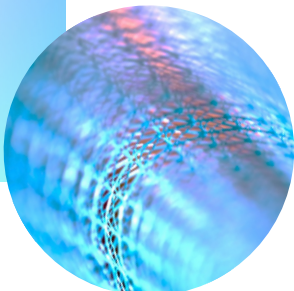
AI & Autonomy

As AI technology has improved and more companies bring it into the workplace, many executives have gone out of their way to say it won't replace jobs. Rather, it will help humans get better at their jobs or free them from menial tasks so they can focus on the things humans are good at, like strategy and creativity. Most of our experts agree, positing that 2030 is too soon to see substantial job loss, and that new jobs will be created along the way. On top of that, they believe AI will be heavily involved with the creative process, particularly in advertising.

And while many see growth in bot-to-bot messaging, few think humanoid robots are in our near future or that AI personae will overtake real users on social-media platforms.

05

Companies rely on artificial intelligence to produce the majority of creative content including music, TV, movies, and art.

A majority of experts (44 out of 62, or 71.0%) see this as likely, with a substantial group (18 out of 62, or 29.0%) rating it highly likely. This was the largest positive shift from our 2020 results of any scenario. AI is expected to be deeply integrated into creative workflows for efficiency, augmentation, and production, particularly for high volume or less complex content.

> "With no doubt our life in advertising content creation will look very different in only five short years. The rate of transformation in only two years since AI became accessible is astounding. Nothing will be the same across the entire advertising ecosystem in 2030."
>
> **Karen Nelson-Field**
> Amplified Intelligence

> "Tools will improve significantly in the next five years, driving tremendous opportunity for advancements in the creative space." But, she added, "the outlier here is the legal aspect of ownership (still focused on human vs. artificial) as well as any regulatory impacts."
>
> **Marla Kaplowitz**
> former CEO, 4As

In the entertainment industry, executives are treading carefully after AI was a sticking point from the actors' and writers' guild strikes in 2023. Netflix Co-CEO Ted Sarandos highlighted in the company's Q2 earnings call the democratization of once pricey special effects like de-aging, which can now be utilized by smaller budget productions. The CEO of ITV, Dame Carolyn McCall, said in their Q2 earnings call that the company was using generative AI to "facilitate the creation of cost-effective advertising content to those SMEs that really, really can't afford to do TV production ads. And to further expand our addressable market."

However, many experts emphasized that human creativity, ideation, and oversight will remain crucial, especially for high-quality, original, or emotionally resonant work. In other words, the majority of a production might be augmented by AI, but the origination of a work will still be human. Some respondents also drew a distinction between advertising content and feature films, saying the former is much more likely to heavily rely on AI.

"I think the majority of conception will be done by humans, perhaps with some AI provocation, but actual production will largely be done by AI," said **News Corp's Norm Johnston.**

Richard Broughton of Ampere Analysis was a little more skeptical, if only about the timeline. "It is too soon for this to happen for the majority of film and TV. AI is moving quickly, and supporting different stages of production, but is not ready yet (and 2030 is pretty close) for full-title production activity. It also won't drive unscripted content — real stories — which underpin a lot of broadcast and streamed content."

There are also regional aspects to keep in mind. "It will be interesting to see how the creator economy embraces this. Key-opinion-leader commerce is enormous for markets like Indonesia so 'content' in broader sense will be impacted," said **WPP Media's Helen McRae.**

South Korea's Naver Corp., an internet conglomerate and early pioneer in user-generated content, has implemented measures to prevent AI bots from crawling its content while also strengthening reward programs to encourage creators to produce high-quality original content.

WPP Media's Claudelle Naidoo noted that AI will be a force to be reckoned with in mature markets across Africa, but "do bear in mind the language, culture, race, and general demographic differences across the region and in markets as well. AI would need to learn more about Africa's vast diversity of people in order to create content that is relevant."

06

Reduction in working hours and wages due to the application of artificial intelligence and automation lowers consumer purchasing power.

Experts are optimistic here, with 66.1% saying it is unlikely (41 out of 62). Some do foresee AI automating tasks, particularly "middle-tier" knowledge work, leading to job displacement and downward pressure on wages in certain sectors. Yet, they also cited historical precedents where technology created new, higher-value jobs and boosted productivity — or they simply believe 2030 is too soon for a major macroeconomic impact.

> "Barring any significant regulation, AI can and will undoubtedly automate certain sectors, and as a result, put downward pressure on wages and earnings until individuals can respond by moving to new sectors of the economy (assuming education, training, etc. is available)."
>
> **Anonymous**

"This one is tricky," said **Clear Channel Outdoor CEO Scott Wells**, noting that in the short term, it's possible we may see adverse effects. "But over time I'm confident we will see purchasing power grow as people discover how to use AI tools to drive productivity and success." Another of our respondents had a slightly less optimistic take, saying that whatever gains are realized "will be collected by wealthy individuals rather than dispersed to the working class."

But we may be thinking about it in the wrong terms, said **Quantcast's Konrad Feldman**. "If AI brings the 'radical abundance' suggested by Sir Demis Hassabis (of Google DeepMind), perhaps consumer purchasing power becomes irrelevant?"

07

Most interaction between brands and consumers is bot-to-bot with personal digital assistants interfacing directly with customer-service bots or virtual representatives.

Experts view this as likely by 2030 (41 out of 62, or 66.1%). The drivers are seen as efficiency, convenience (especially for routine tasks like customer service or transactions), and the increasing sophistication of AI assistants and bots.

> "I think a meaningful portion of brand-to-consumer interaction will be bot-to-bot by 2030, but not most. It's 2025 and most consumers don't even know what we're talking about in this question, so we have a lot of early work to handle before 'most interaction' is bot-to-bot."
>
> **Brian Cooley**
> Cooley Insights

Even in industries that are already heavily automated, it may take some time. Executives from both Bookings Holdings and Expedia said in recent earnings calls that it was too soon to tell how AI agents would affect their search traffic and other aspects of the business.

But some believe even if only a minority of consumers use personal assistants heavily, they could drive the majority of interactions by volume.

Whether they believe it will happen or not, most agreed that it would present challenges for marketing and increase the importance of human customer service, particularly for higher end goods and services.

> "I think AI2AI will be the prime means of how brands and customers communicate to and with each other, which will make breaking through the algorithmic straight jacket even tougher for challenger brands."

Norm Johnston
News Corp

"For premium brands, that will never work. Customizations, human involvement is going to remain essential. A luxury brand will not survive if it doesn't have the human interaction," said **Serge Matta of LG Ads**.

Ford's Rahul Gautam went so far as to say that consumers might put those bots to use to thwart marketing efforts. "Consumers would like to stay in control and make choices. Virtual representatives would be used more to block unwanted engagements from brands."

08

Most (>50%) of the 'users' on social platforms are personae.

Experts lean toward this being unlikely (38 out of 62, or 61.3%), with some of those acknowledging that it's a possibility, but something they hope doesn't happen. ("My goodness, I hope not," was one response. "How depressing," was another.)

It's also something that Meta's Mark Zuckerberg talked about during his press tour for the rollout of Meta AI earlier this year. "Here's one stat from working on social media for a long time that I always think is crazy: the average American has fewer than three friends," Zuckerberg said during a podcast. "And the average person has demand for meaningfully more. I think it's something like 15 friends or something." The solution could be AI-generated friends.

Our experts who see it as likely point to the ease of creating AI personae, noting that social media has evolved rapidly over the last two to three years.

Skeptics argue that, despite the obsessions of their CEOs, platforms have incentives to detect and limit AI personae. Users seem turned off by the idea. After all, human connection remains central to social media's appeal.

> "Fake life is no life. Platforms will limit [this]."

Joshua Spanier
Google

> "The technology may be there, but my guess is that humans remain what people want to see and interact with. Though CGI likely is increasingly mixed into media creation, blurring this line."

Andrew Boone
Citizens

Acceptance is likely to vary not just by platform, but also by region. Some audiences may view AI generated personae as more similar to human influencers, but different from direct personal connections. We may see filters or subscription tiers arise that cater to those (both users and advertisers) who demand human content.

"It's possible this will occur, but I would also expect service providers to manage the issue to a degree to avoid their platforms becoming unusable, implementing more sophisticated AI detection tools."

Richard Broughton
Ampere Analysis

"In Asia, there is much less concern about this. Virtual influencers have existed for a while here, and there is acceptance of both real and virtual."

Helen McRae
WPP Media

09

More than 5% of households globally have humanoid robots.

Elon Musk might be selling visions of mass-produced humanoid robots in every home, but our experts aren't buying it. This is overwhelmingly seen as highly unlikely (37 out of 62, or 59.7%, rated it 1-2). Key barriers cited are the high cost, lack of demand in a domestic setting, and the complexity of the technology. 2030 is considered far too soon for this level of adoption.

"Maybe 1%. So far, humanoid robots cost a lot, do very little, have limited accurate awareness among consumers, and just seem weird. Not a formula to hit 5% in 5 years."

Brian Cooley
Cooley Insights

"There is simply no proven use case let alone proven demand for such technologies. It may be true in 5% of the 1% richest zip codes in the world. The only possible chance is if elder care can be significantly automated."

Rob Norman
Advisor and Board Director

Even if there was demand, it's likely impossible to hit the production numbers needed to supply it, said **Citizens' Andrew Boone**. "There are 2.3B households globally. This implies 100M+ humanoid robots. No way we get a supply chain that can handle that in the next five years."

Other respondents pointed out the high cost of early humanoid robot offerings. While prices can appear as low as $10,000 to $20,000, the most advanced, and presumably useful, are still likely to run more than $100,000.

That's not to say there will be no robots in homes. Roombas, after all, are technically robots. Indeed, a number of respondents specifically mentioned task-specific robots. "I am not that optimistic about humanoid robots. I am bullish on other robots," said **Yan Liu of TVision**.

Commerce & Consumption

Scenarios projecting major changes to the way people consume goods and services were largely deemed unlikely as experts pointed to the inertia of ingrained technology. Experts don't see new technologies like smart glasses and autonomous vehicles as pervasive enough by 2030 to disrupt established devices. They may be underestimating the desire for immersive tech, though cost will remain a barrier. Cost was a key factor in one of the biggest turn-abouts since the 2020 report: the perception that sustainability will be as important as price in consumer decisions. In terms of how people consume and pay for goods and media, experts don't seem convinced that subscription services for goods will continue to climb or, ironically, that micropayments will provide a sustainable complement to media subscriptions.

It is unlikely that the way people consume goods and services would change by 2030 due to cost barriers for newer technologies.

10

Sales of AR glasses, VR headsets, and smart earbuds outweigh sales of smartphones and smartwatches.

This is overwhelmingly viewed as highly unlikely (31 out of 62, or 50.0%, rated it 1-2). In fact, this was the only one of our 20 scenarios where 0% of experts believed it was highly likely to be true in 2030. Smartphones are seen as too dominant and versatile, while AR and VR technologies face persistent challenges with cost, comfort, social acceptance, and compelling use cases beyond niche applications. Earbuds are successful, but they are seen as complementary technology.

"Considering the slow mass adoption of VR headsets, it's unlikely they'll lead the market anytime soon. While smart earbuds and AR glasses have potential to become more mainstream, they still require substantial technological advancements. Given current limitations in cost, comfort, and social acceptance, I'm skeptical we'll see a major shift within the next five years."

Kirsten Hasler
IKEA

Technology aside, "phones are too massive a business for glasses and headsets to become larger by then."

Brian Wieser
Madison & Wall

Other respondents tended to agree, noting that AI could drive upgrades and increased use of smartphones in the near term.

Interestingly, this study was fielded *after* EssilorLuxottica, which produces Meta Ray-Bans for the social-media giant, reported that it had sold 2 million pairs since their October 2023 debut and that it aims to produce 10 million *each year* by the end of 2026. On the other hand, the survey was conducted *before* Google announced its new XR glasses and before OpenAI acquired Jony Ive's company, heralding the arrival of new AI devices. Still, our experts are likely correct that the numbers of these devices still pale in comparison to the number of smartphones sold globally.

11

Consumers have embraced 3D printed alternatives to mass-produced products.

This is viewed as unlikely by a strong majority (50 out of 62, or 80.6%). Experts largely see 3D printing as a niche technology, suitable for prototyping or specific industrial and hobbyist uses, but inefficient and costly for mass consumer production. It's continued failure to catch on for home use despite the hype prompted one respondent to ask, "Is this a question from 2015."

"Use beyond industrial application and niche hobbyists is growing, but cost, complexity, and material options remain barriers to 3D printers in every home."

Konrad Feldman
Quantcast

"I don't see people buying home 3D printers in mass, but I do see them buying mass-produced 3D printed products."

Norm Johnston
News Corp

The one possibility of more uptake, said **Google's Joshua Spanier**, is if 3D printers become able "to deliver electronics and moving parts."

12

Publishers have embraced seamless micropayments as a meaningful alternative to subscription and advertising revenue.

Experts are more pessimistic about this now than in 2020, with 67.7% viewing it as unlikely (42 out of 62).

Friction, both practical and psychological, has been and will remain the main blocker.

> "Ease of payment and willingness to pay are two very real barriers to entry."
>
> **James Hier**
> Wavemaker

> "We've been wondering about this for 30 years. It's a lot harder than it looks. It might happen, but there's no way to predict when."
>
> **Benedict Evans**
> Technology industry analyst

For publishers, advertising still pays the bill for many. And on the premium end, old-fashioned subscriptions are still the way to go. Some respondents said that micropayments would remain niche as long as premium subscriptions were continuing to pay the bills — the old, "if it ain't broke, don't fix it" mantra.

That said, it seems plausible that answer engines and AI chatbots, as part of their licensing arrangements with publishers, could facilitate micropayments, enabling audiences to click through and read sources cited by AI, even when behind a paywall. Publishers may be looking at this as part of the licensing deals they are pursuing with AI companies such as Anthropic and OpenAI.

13

Environmental impact is as important as price in consumer purchase decision making for both goods and services.

In a striking reversal, this scenario is now overwhelmingly considered unlikely (46 out of 62, or 74.2%). In 2020, more than 70% viewed it as likely. While acknowledging growing awareness and importance for some consumers (often wealthier ones), experts believe price sensitivity, economic pressures, and convenience will continue to dominate purchase decisions for the majority.

> "I think we have seen regression not progression with sustainability aspects in the last year or two."
>
> **Professor Andrew Stephen**
> University of Oxford's Saïd Business School

> "This has been a nice-to-have and consumers under cost pressure are trading away from this."
>
> **Helen McRae**
> WPP Media

But some of the answers indicate this might be less of an actual behavioral change by consumers due to political and cultural issues and more likely that the gap between stated intent and actual behavior became apparent.

"Despite what consumers say they do, their actions do not appear to be influenced at all by 'green' initiatives today."

Andrew Boone
Citizens

"Price will continue to trump sustainability."

Phil Smith
ISBA

With no government pressure to change behavior, it might come down to natural intervention. "As extreme weather events become more frequent across Australia, public acceptance of climate change is growing. Many consumers genuinely want to make more sustainable choices, but this shift will only gain traction when companies can offer environmentally responsible products at prices that don't feel like an added burden. Affordability is key to turning good intentions into real behavior change," said **IKEA's Kirsten Hasler**.

14

Transit-and transportation-based advertising, including within ridesharing and self-driving vehicles, surpasses 10% of total advertising revenue.

Experts are skeptical, with a majority (39 out of 62, or 62.9%) rating this as unlikely. The issue isn't whether or not this form of advertising will grow — most of our experts said it would. Rather, 10% of total ad revenue by 2030 is seen as a very high bar. Respondents raised doubts about scale, inventory quality, consumer attention, and the pace of self-driving adoption, while pointing to competition from other growing channels.

"Assuming continued growth of other, arguably more mature advertising channels (CTV) and emerging channels (AI)," said one respondent, the 10% "seems highly unlikely."

"As information on consumer journeys and consumer preferences gets more accessible, the premium for impacting those journeys in real time will grow. This will be helped by AI-enabled content/creative generation,"

Scott Wells
Clear Channel Outdoor

"High dwell times and targeted environments make transit a fertile ground for ad innovation. The growth of smart vehicles and mobility platforms will drive acceleration, but not to the 10% level by 2030."

Konrad Feldman
Quantcast

Ride-sharing and mobility companies are certainly eying the opportunity as autonomous vehicle services like Waymo expand rapidly. That said, in Uber's most recent earnings call, CEO Dara Khosrowshahi said that he expected the commercialization of autonomous vehicles to take time, given how early in the development cycle we are right now.

15

Most products and services are purchased as part of individual or bundled subscriptions.
Experts believe this is unlikely (41 out of 62, or 66.1%). Subscriptions are a given for digital services and media, but many are skeptical that this will extend to "most" products, physical goods in particular. Factors like subscription fatigue, consumer desire for choice, the unsuitability of subscriptions for many purchase types, and regional differences (e.g., offline retail dominance in parts of APAC) are cited as limitations.

"I believe subscription fatigue is real. On top of that, it's so easy to buy without a subscription. Consumer products and daily goods are easily procured with the click of a button on an ecommerce site. A subscription would need to deliver demonstrable savings over regular one-off purchases to motivate the commitment of adding another subscription."

John Harrison
EY

"I think this will be sector-dependent. Household supplies and utilities, which are regular usage and low-interest categories, definitely. Things that can be bundled with them like entertainment, yes. Maybe high-cost sectors like cars, will be next in line. However, there's still lots of room for non-subscription-based purchases in less automated and more 'choiceful' sectors as well (clothes, food, etc.)"

Anonymous

So how do marketers move beyond media, household and pet supplies? The answer might lie in AI. It's possible that new interfaces and omnipresent smart sensors can help shift subscriptions from "numb and dumb" as one respondent put it, to a smarter and more frictionless experience. But the trust involved in coordinating across smart glasses, for example, and agents that can navigate the web and the home is likely to be hard won, and the capability set isn't yet fully baked.

16

It is easy for individual consumers to eliminate all exposure to advertising from their daily lives.

While there was a time when ad-blockers and ad-free streaming services struck some as an existential threat, experts now overwhelmingly agree that eliminating all exposure to advertising is highly unlikely (36 out of 62, or 58.1%, rated it 1-2). Advertising is seen as pervasive across digital and physical environments. While ad-free paid options exist, ad-blockers are still available, and there are some corners of the gaming universe extremely resistant to advertising, completely eliminating all exposure is deemed practically impossible without significant lifestyle changes like going off-grid.

In fact, with the reinvigoration of out-of-home and more platforms offering sports and other live events specifically for the ad play, not to mention the proliferation of influencers, the inverse may happen.

"I think it will be the opposite. It will get harder for us to avoid."

Karen Nelson-Field
Amplified Intelligence

"Advertising will continue to be ubiquitous and the quality of the advertising will continue to be the prevailing factor in gaining consumer attention."

Nicola Lewis
WPP Media

"Even with more ways to opt out of marketing messages, I don't believe we'll reach a point where advertising can be completely eliminated from daily life. Advertising is deeply woven into our environments, both digital and physical, and when done effectively, it doesn't just reflect culture, it helps build community and connection," said **IKEA's Kirsten Hasler**

In a Spy vs. Spy scenario, some respondents posited that AI would make for better ad-blockers, while others wondered if ad-blockers would work at all against LLM content.

According to **Clear Channel Outdoor's Scott Wells**, "As AI proliferates, advertising will become more endemic. Less a disruption to content and more part of the content. No question there will be ways to opt out (already are), but content proliferation is also going to create opportunities for ad proliferation. For out-of-home — with its presence in the physical world — AI will make it easier for those impactful locations to be even more relevant for specific advertisers and creative messaging."

Media & Platform Evolution

As in 2020, experts don't foresee breakthrough change in how people use media, or which platforms they use. Google, Meta, and Microsoft are all, as of yet, intact, and while they face competition from OpenAI, xAI, Anthropic, and Mistral (all new since the last survey other than OpenAI),

respondents aren't convinced the leaders will be toppled within the next five years.
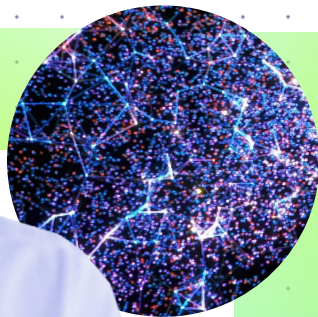
17

People spend more time interacting with virtual worlds than the physical one.

Experts view this as unlikely (39 out of 62, or 62.9%), though we acknowledge the ambiguity in the term "virtual worlds." If it includes existing digital interactions (screens, video calls, social media, gaming), some argue we might already be close. Interestingly, while workers continue to embrace virtual meetings, execs across the world have been pushing for return-to-office.

On the other hand, when we start talking about immersive VR/metaverse experiences, skepticism is high. This could be a technical issue as much as anything. As stated in an earlier section, the gear for VR experiences is still unwieldy. As the gear gets better, sentiment could change. Though not part of our expert survey, we were struck by this prediction from "AI 2027": "Integrated into the traditional chatbot interface, Agent-5 offers Zoom-style video conferencing with charismatic virtual avatars. The new AI assistant is both extremely useful for any task — the equivalent of the best employee anyone has ever had working at 100x speed — and a much more engaging conversation partner than any human. Almost everyone with access to Agent-5 interacts with it for hours every day."

Even so, when considering these "purer" forms of virtual worlds, our experts seemed to think that real-world connections would continue to trump simulated experiences.

> "AI should free up time to engage more in the physical world as people crave human connection."

Marla Kaplowitz
Former CEO, 4As

> "It's unlikely that people will spend more than half the day in virtual worlds. People still need to work, connect with others, and spend time with family and friends."

Stephan Beringer
Former CEO, Mirriad

Outside of day-to-day work and social interactions, our experts didn't foresee virtual formats taking over. The hype around metaverse events and concerts in platforms like Fortnite have faded as the world has shaken off its pandemic-era restrictions. Real-life concerts and sporting events are expected to retain their appeal until VR technology becomes cheap and ubiquitous.

18

Today's leading internet-based service providers, platforms, and social-media companies remain intact as global consolidated entities.

A majority of experts (35 out of 62, or 56.5%) view this as likely, even more so than in our 2020 survey. The incumbents are seen as having strong moats (network effects, data, resources) and are expected to adapt to consumer and technological changes that come their way. However, there is significant uncertainty due to potential regulatory action in some countries and geopolitical pressures in others tipping the scales for players in certain regions. And there is always the possibility of disruption from new players.

And the major players won't simply adapt to changes.

> "Any unbundling will be fought ferociously by the platforms and is unlikely to succeed in the 2030 near-term."

James Hier
Wavemaker

> "I think their moat is strong and AI will make it even stronger."

Yan Liu
TVision

"They will fight for their lives and will have a hard time to keep their power," said **Federico De Nardis of WAY**, though he added that "AI based newcomers will most probably take some of that power away."

19

The majority of news consumption is of individual "creators," citizen journalists, and AI-generated bots.

Experts lean towards this being likely (39 out of 62, or 62.9%), though they're not exactly thrilled by the prospect.

"Heading in this direction already. Which is scary."	*"God help us."*
Professor Andrew Stephen	**Brian Cooley**
Oxford Saïd Business School	Cooley Insights

The reality reflects the ongoing fragmentation of news, the rise of creator and influencer-led content, low barriers to entry, and the potential for AI to generate news content efficiently.

"They are the new trusted messengers and sadly, the investment into traditional news that enables high-quality journalism is declining. Maybe not quite by 2030 but I fear it won't be long afterwards," said one respondent**.**

EY Americas Media & Entertainment Growth Leader John Harrison says it's almost certain this will happen at the local level. But at "the national level, there will remain room for a handful of well-funded, well-staffed national news brands that support their newsrooms with ancillary content, live events, [and] conferences."

However, many express concern about credibility, misinformation, and the devaluation of traditional journalism.

"The definition of 'news' is different for different consumers," said **media consultant Edward Swindler**, who has taught "Business of Media" classes to college students. "They have little understanding of the editing function, which helps ensure content credibility… There are so many sources of 'news' today with widely varying levels of truth, spin, deception, mis/dis information that we must teach kids and adults how to consume news that informs rather than just reinforce existing views. This is an existential problem for the U.S. in particular."

20

Most people use social media platforms privately while the public social space is dominated by promotional content, mainly from brands and public institutions.

 A slight majority of experts view this as unlikely (32 out of 62, or 51.6%). Some cited examples from Asia as trending in the opposite direction, as well as an inherent human nature.

"I don't think so. Too much of the allure of social is being seen," said Brian Cooley.

However, many felt this trend was already in progress and in fact, testimony from Meta's recent antitrust trial seemed to support this, suggesting that people post less often on social media now than they used to.

It might be in the platforms' best interest to fight such changes. "I can't see social media platforms wanting that shift," said **Karen Nelson-Field of Amplified Intelligence**. "Promotional content actually works more efficiently inside communities, where people are more engaged and recommendations carry more weight."

Other respondents agreed, noting that brands would have the motivation to find ways of engaging within closed networks and relevant communities as well as within the public domain.

The considerations for individual users of social media may also increasingly revolve around communities and private conversations, as people become more cautious about the impacts of posting personal content in public spaces. The use of public social data for large language model training may also enter into the decision for some.

Conclusion

Making predictions about the future of an entire industry — especially one that sits at the crossroads of commerce, culture, and technology — is hard. Finding consensus among dozens of experts isn't easy either. But across the board, we all seem to agree that there's no stopping the advance of artificial intelligence (or even slowing it down). We might disagree about when (or if) we'll reach artificial general intelligence, but no one is debating the fact that AI has already made a mark on the work we do.

Consumers will continue to adopt new technologies and develop new habits. Marketers will continue to offer those consumers new services and products, while also evolving along with technological changes. In some cases, our opinions diverge from those of our experts about which of those changes are more likely to happen than others. Even then, it's often a matter of degree.

Some of the big changes will take longer than five years.

Some of the biggest players may change, or at least change positions in the rankings. They'll likely take different paths when it comes to the embrace of personalization or their approaches to AI-generated content, or the use of agents and bots, or even their methods of revenue generation.

And any number of advances will play out differently in different regions of the globe due to cultural, technological, or even linguistic differences, particularly since the concept of global alignment on these topics seems to be, at best, a mirage.

One thing, however, is certain:

Advertising will remain a critical plank of the economy. And not just for traditional media publishers, but also for retail, transit, and other sectors that are moving into the space.

Contributors

Jay Askinasi
Head of Global Media
Revenue and Growth, Roku

Anna Bager
CEO, OAAA

Stephan Beringer
Former CEO,
Mirriad

Adam Berlin
Head of European Media
Equity Research,
UBS

Andrew Boone
Equities Research,
Citizens

Richard Broughton
Co-Founder,
Ampere Analysis

Lee Brown
Head of Advertising,
Spotify

Steven Cahall
Managing Director & Senior
Equity Research Analyst for
Media & Advertising - Wells
Fargo Securities

Bill Capodanno
Head of Global
Consumer Media,
Amazon

Brian Cooley
Principal of Cooley Insights

Pat Crowley
GM Marketing,
Commonwealth Bank
Australia

Anne-Laure Dreyfus
TV Director,
egta

Dan Elddine
Audience Data Strategy,
NBCU

Benedict Evans
Technology Analyst

Konrad Feldman
CEO, Quantcast

Rita Ferro
President,
Disney Global Advertising

Rob Gaige
Global Head of Insights,
Reddit

Rahul Gautam
Director of Digital &
Performance Marketing, Ford
International Markets Group

Aaron Goldman
CMO,
Mediaocean

Raymond Goulbourne
EVP of Broadcast Media Sales,
BET Networks

Emmy Grunseich
VP of Strategy & Business
Operations, Yahoo DSP

Ralf Hape
CEO, ARD Media

John Harrison
EY Americas Media &
Entertainment Growth Leader

Kirsten Hasler
Head of Marketing,
IKEA AU & NZ

James Hier
Chief Growth and Product
Officer, Wavemaker

Norm Johnston
SVP Global Head of
Advertising Strategy,
News Corp

Marla Kaplowitz
Board Director and
Former 4As CEO

Ashan Khan
Head of Global Agency
Partnerships, Uber Advertising

Ekaterina Kharitonova
Global Media Procurement
Leader, Bayer

Richard Kramer
MD and Founder at
Arete Research

Nicola Lewis
Chief Media Solutions
Officer, WPP Media

Yan Liu
Founder and CEO,
TVision

Byby Mantilla
Communications, Ford
Colombia

Serge Matta
President, Global Ad
Sales at LG Ad Solutions

Helen McRae
CEO, SEAPAT (SE Asia,
Pakistan, Africa, Taiwan),
WPP Media

Antonieta Melo
Marketing Manager,
Ford Chile

Andy Morley
Sr. Director of Marketing,
Uber and Uber Eats,
APAC

Claudelle Naidoo
CEO Sub-Saharan Africa,
WPP Media

Federico de Nardis
Founding Partner, WAY

Karen Nelson-Field
Founder,
Amplified

Rob Norman
Advisor and Board Director

Denise Ocasio
Head of Investment,
Mindshare NA

Brian O'Kelley
Cofounder and CEO,
Scope3

Jane Ostler
Chief Insights Officer, Kantar

Ari Paparo
CEO of Marketecture Media,
Author

Anna Prendergast
Global Client President,
WPP Media

Katty Roberfroid
Director General,
egta

Dan Salmon
Partner,
New Street Research

Phil Smith OBE
Director General,
ISBA

Joshua Spanier
VP Marketing,
Google

Andrew Stephen
L'Oréal Professor of Marketing
and Head of the Marketing
Faculty at Oxford Saïd
Business School

Ed Swindler
Former NBC Executive
and Media Consultant

Kate Waters
Director of Client
Strategy and Commercial
Marketing, ITV

Scott Wells
CEO,
Clear Channel Outdoor

Brian Wieser
Founder,
Madison & Wall

Nicola Wright
Director Media and
Performance,
Emerging Markets,
Adidas

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

Anonymous

For more information, please reach out to: business.intelligence@wppmedia.com

WPP Media

3 World Trade Center
175 Greenwich Street
New York, NY 10007

A WPP Company

WPP Media is WPP's global media collective. In a world where media is everywhere and in everything, we bring the best platform, people, and partners together to create limitless opportunities for growth. For more information, visit **wppmedia.com.**

Images produced by WPP Open Studio – Google Imagen 4 Fast, and sourced from Unsplash.com, and Pexels.com.