



# MEDIA *IMPERATIVES* 2025

The 2025 perspective from consumers, media partners, and brands

December, 2024

**HAVAS** Media  
Network





To get a pulse  
on the future,  
we explored three  
critical perspectives

**Today's media experiences are more data-driven, connected, and personalized than ever before.**

In an ecosystem where competition for attention has never been fiercer, all eyes are on consumers' shifting expectations, and how brands can deliver seamless experiences that are meaningful across the entire path to purchase.

With new technologies, consumer trends, and storytelling formats developing every day, we reached out to media stakeholders about their priorities for the year ahead. What will they do differently in 2025, and what are their media imperatives, no matter what trends unfold?

We wanted to hear directly from consumers about their expectations, from media platforms about their evolution, and from brands about the focus of their media strategy. Through interviews and research, this report looks at the media imperatives at the intersection of these three critical perspectives.



01

THE CONSUMER VIEW

# The Consumer View

2025 Media Imperatives



# How are expectations for media changing? We surveyed over **156,500 consumers** **to find out.**



Amid our global "**permacrisis**" of profound economic, societal and environmental challenges, something inspiring is happening.

Our 2024 Meaningful Brands™ Report reveals a surprising shift in attitude:

People aren't just coping — they're reclaiming control. Empowerment and agency are on the rise, with 69% of people globally agreeing, "I don't let tough times keep me down; I keep moving forward." This shift toward empowerment is deeply personal, showing up in different ways across regions, communities, and individuals.

Notably, half the top performers in our research were media brands.

These brands go beyond fulfilling a functional need for information and entertainment; the most meaningful media offers us tools for empowerment: to explore our own beliefs, to celebrate our personal passions and voice our opinions.

But Meaningful Brands™ also reveals that consumers' expectations for media brands, and how they engage with them, is changing.

Over time, as universal, shared media moments slowly decline, people are navigating to more curated and personalized media experiences.

In 2025, people will even more seamlessly switch between platforms to be in control of their own moment specific needs across entertainment, escapism, utility and fandom.



## People crave content that feels made for them

People continue to spend more time on social media and video-sharing platforms, and this is set to keep increasing in 2025.

Social media's weekly reach has grown by nearly 20% in the last year (Connect, 2024), and engagement levels outpace the average of other media channels by 27%.



Younger generations gravitate to interactive and entertaining experiences offered by short-form and authentic creator video content on platforms like TikTok and Instagram.

Meanwhile, VOD/BVOD platforms are thriving too, with younger viewers enjoying curated and exclusive binge-worthy content, and older viewers appreciating the convenience and control these platforms offer.

Across both social and VOD/BVOD, the breadth of personalized content is key to their success, delivering fresh, relevant experiences that capture attention without demanding audience commitment. The algorithms of social media and VOD leverage a perfect balance of tech-driven recommendations and a personalized, human-like touch, to maintain customer trust.



## A shopping experience that doesn't feel like a chore

Media is becoming more shoppable as social commerce transforms retail, seamlessly integrating every step of the buying journey into the platforms people are spending more time on, creating an effortless path to purchase.

Projected to reach USD 7.03 trillion by 2030 (Strategic Market Research, 2024), social commerce shows no signs of slowing down in 2025.



A shift to shopping experiences with "real people like me" is gaining momentum, from mass influencers building their own media brands to a myriad of relatable micro-influencers.

Powered by features like engaging product demonstrations, slick CX and the simplicity of sharing products with others, this blend of media and shopping experiences fosters trust.



## The resilience of TV and the battle for attention

TV continues to hold the loyalty of the general population, with its unmatched **annual reach (86%)** and daily time spent (1 hour and 48 minutes) globally.



For older generations and even families, TV remains a shared media experience, providing content that is more trusted.

While TV remains a key channel, it is also where people are most likely to multi-task or 'multi-media'. Holding people's attention continues to be difficult. Why? The answer leads us back to the era of agency revealed by this year's Meaningful Brands™. Consumers now have endless content choices in media, and they are quick to move on to the next if they're not fully engaged.



## Entertainment that educates

Havas' 2024 Global Content study revealed people are drawn to consuming branded content in story-like formats.

Leveraging user generated content and working with influencers that are authentic to brand values resonates. Authenticity fosters deeper engagement and creates experiences that can evoke emotions.

Adding surprise elements can create saliency, but it's important to balance entertainment and information.



Looking to 2025, there is an increase in consumer demand for educational content. Agency resurfaces as consumers are leaning towards credible sources to empower them with knowledge and skills. Younger audiences show a strong appetite for immersive experiences in formats that offer excitement and novelty like VR and AR.

**To be  
meaningful,  
get personal**

Meaningful Media Experiences in 2025 must be user-first, recognizing that one-size-fits-all is not enough.

Hyper-personalization is key in meeting consumers' evolving needs. Immersive storytelling captures interest and maintains engagement through emotional connection. Incorporating features like shoppable content can seamlessly bridge inspiration and action. Creating a meaningful media experience is a carefully balanced formula of providing relevance, convenience, credibility, and enjoyment.



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TikTok

Google Cloud

Spotify

WhatsApp

TradeDesk

# The Partner View

## 2025 Media Imperatives

02

# How we discover news, share trends, indulge our passions and even shop is shaped by the media brands that we interact with every day.

People's media habits evolve not only because of social and cultural changes influencing their interests, but also due to content and UX innovations from these brands that are woven into our lives.

We asked product and marketing leads from some of the most meaningful global media brands what their imperatives are to improve both the user and advertiser experience in 2025.





01

## New formats for storytelling

Media has always been about storytelling, but how we consume stories is rapidly changing. As publishers and content creators locally and globally observe these shifts and innovate to earn and keep consumer attention, we will see story formats increasingly curated to personal tastes, ranging from homemade short-form content, to shared moments with live events, to epic streamed productions.

YouTube Shorts harnesses a fully immersive experience that is drawing in 70 billion views every day. This short-form platform is the home for fun and impactful moments - in 3 minutes or less. Inside the Shorts feed, people are happy and ready to tap, swipe, and click on stuff they're passionate about.

For brands, this highly engaging surface is a great way to gain insight into today's top creators and trends.



**Melissa**  
Hsieh Nikolic

Director, Product  
Management,  
YouTube Ads

Netflix's mission is to entertain the world, reimagining entertainment by leaning into must-watch series and films with a personalized member experience for our fans.

In 2025, we want to innovate with ad formats that put brands at the forefront and drive more action from members, with new advertising solutions as we expand into areas like live entertainment, and the launch of our in-house advertising technology, we will provide clients with even more control, insights, and capabilities.



**Doug**  
Brodman

Senior Director,  
Advertising Sales,  
Netflix for UCAN

On Instagram, global growth remains strong and we're excited for 2025. Reels continues to perform strongly and is now 50% of time on Instagram with people resharing more than 3.5 billion Reels per day.

On Threads, the community now has over 275 million monthly actives and we continue to be on track towards this becoming our next major social app in 2025.



**Nick**  
Baughan

Head of Global  
Agency, Meta

I'm excited for what 2025 holds for Snapchat as we continue to highlight what sets us apart from traditional social media. With authenticity and connection at our core, our community keeps growing and engaging more deeply.

In 2025, we'll introduce new product innovations and more advertising solutions, helping even more brands recognize Snapchat's potential to drive performance and attract new customers.



**Kate**  
Bird

Senior Director of  
EMEA marketing,  
Snap inc.

O2

# Blended worlds defy categories

In 2025, expect boundaries to blur in a blended, omnichannel environment where B2B media becomes more about entertainment and audio becomes visual. This is the era of seamless screen swapping, where it's no longer about the device you're on but what's meaningful from your favorite media brand in the moment.

At NBCUniversal, we see the deep connection our audiences have with our content and communities. People don't differentiate between screens when they're watching TV, which is why we have invested in cross-platform ad solutions that marketers need.

With the ability to reach strategic audiences at scale, we're moving away from legacy narrow demo proxies. Combined with a nuanced understanding of ad impact, we're amplifying media effectiveness within a best-in-class viewing experience.



NBCUniversal

**Mark  
Marshall**

Chairman, Global  
Advertising & Partnerships,  
NBCUniversal

Video is now the fastest-growing format our members consume on LinkedIn, with uploads rising 34% year-over-year on the platform. We are continuing to evolve our events and video solutions, like the Wire Program, which helps B2B marketers promote in-stream video ads alongside trusted publisher content.

AI-driven ROI and productivity growth will continue to fuel B2B marketing in 2025, with solutions like LinkedIn's Accelerate helping them focus on higher-value work.



LinkedIn

**Abhishek  
Shrivastava**

VP of Product  
Management, LinkedIn

We are excited for WhatsApp's trajectory with the US being one of our fastest growing countries. Globally we just passed a milestone of 2 billion calls made every day. Business Messaging is a core priority for us and we see real opportunity for agencies and advertisers to drive value here going into 2025.



WhatsApp

**Nick  
Baughan**

Head of Global  
Agency, Meta

Spotify is more alive than it's ever been. Over the last few years, we've introduced more experiences like music videos, call-to-action cards for advertisers, AI DJ and more.

In 2025, video will continue to be a big swing for us. Video consumption is exploding on Spotify, driving more engagement on our platform. This means more ways for advertisers to reach our already hyper-engaged users.



Spotify

**Lee  
Brown**

VP, Head of Advertising,  
Spotify



## Media moments become Retail opportunities

In today's customer-obsessed marketing world, media brands are laser-focused on proving their ability to drive business value. We're increasingly able to shop directly in the media platforms we spend time on. At the same time, retailers will continue to develop their own media experiences for customers. As these business models converge, a frictionless experience is key, with tech powering us to faster, more convenient and more personalized shopping opportunities in 2025.

TikTok is the one place where culture, discovery and commerce come together in a way that allows brands to launch, grow and thrive. Users effortlessly transition from discovering to searching, buying, and sharing in just a few swipes.

Our mission is to continue to inspire new business possibilities, making TikTok an indispensable business partner for brands and agencies. In 2025, we will continue to develop frictionless shopping experience for users to take action at the point of discovery. We will also be accelerating our investments in AI-powered solutions to further improve return on investment.



  
**Adolfo Fernández**  
Global Head of Commerce Product Solutions & Operations, TikTok

At Amazon Video, we continuously innovate to enhance the viewer and ad experience, blending best in class content through Prime Video and Live Sports, premier ad technology through our DSP and Amazon Marketing Cloud, and seamless integration with commerce, in a way only Amazon can.

We're providing exceptional storytelling, in an interactive environment that connects customers and brands in an engaging way that drives results. This holistic approach delights customers while offering brands premium full-funnel advertising opportunities at scale.



  
**Jenny Burke**  
Director of WW Video Strategy and Go-to-Market, Amazon

There are many places to make purchases on the Internet, but as the online world built for instant buying, it also killed the joy of shopping. In 2025, we are going to continue our work to make online shopping as personal and fun as it can be, while also using cutting-edge AI technology to simplify the decision-making process for consumers and deliver more impact for advertisers.

Our strategy is centered on integrating shopping experiences throughout the platform, refining recommendations through improved personalization and relevance, and innovating to help advertisers seamlessly connect with users who are eager to shop and buy.



  
**Martha Welsh**  
Chief Strategy Officer, Pinterest

Weibo continues to be the most used social platform in China. Our iconic Hot Search List is the key to understanding what people care about right now and the fastest way to track and shop cultural, entertainment and celebrity trends as soon as they emerge.

In 2025 there will be even more creative opportunities for brands to tap into this behaviour and connect fans with their favourite celebrities by creating unique brand experiences in real time on the platform together.



  
**Breese Yan**  
Channel Director of East China, Weibo

04

## Technology powering effectiveness

Media experiences are just as much about what happens behind the scenes as the content we enjoy. As data connectivity and Gen AI make rapid strides, the ambition is to empower marketers with technology, allowing them to create more meaningful media experiences with greater ease. However, adoption of new technologies must be grounded in a framework that balances progress with consumer privacy and trust.

At Google Cloud, we're not just building the future of AI, we're building it with the consumer experience in mind.

Our innovations are designed to empower marketers and media leaders to create personalized, engaging, and truly innovative experiences that resonate with their audiences on a deeper level.



 Google Cloud

**Juliet  
Bramwell**

Director of Telco, Media  
& Entertainment, Google  
Cloud UK/I

Advertisers want to measure outcomes directly, connecting brand objectives to sales and category growth. Full-funnel advertising links tactics across awareness, consideration, and conversion to measure each tactic's contribution for optimization. Amazon Ads grows awareness through premium content and third-party publishers. We help brands convert in our store, their store, and stores across the internet.



 amazon ads

**Amy  
Armstrong**

Director of Global  
Customer Development,  
Amazon Ads

In a mixed-cookie environment, to meet consumer need for trust while capitalizing on new opportunities like Connected TV or Commerce Media, brands must leverage a combination of first, second and third-party data.

At Adobe, we want to bring interoperability and simplicity to this ecosystem, while allowing brands and publishers to work collaboratively. These are the principles behind Adobe Real-Time CDP Collaboration, which will be purpose-built for brands and publishers to connect and engage audiences in a privacy-centric environment.



 Adobe

**Ali  
Nazer**

Sr. Director of Product  
Management for Audience  
& Activation, Adobe

The convergence of CTV, retail data, and identity solutions has transformed how brands connect with audiences. And while there may have been an emphasis on cheap reach, putting ads on low-quality content, we see advertisers finding more value in high-quality inventory across the open internet.

In 2025, there'll be a greater focus on tools that enable quality, effective use of data, and efficient supply chains to make better media investments.



 theTradeDesk

**Jed  
Dederick**

Chief Revenue Officer,  
The Trade Desk



THE BRAND VIEW

03

# The Brand View

2025 Media Imperatives

# The scope of media is changing.



Against the backdrop of evolving media habits and innovative user experiences, brands are broadening their focus for media beyond just where and when they invest their money. Media is intertwined with every aspect of the increasingly customer focused marketing ecosystem.

We interviewed a cross section of our global and local clients across a diversity of categories, speaking with both media and marketing leaders to discover three unifying themes in their 2025 media imperatives.



01



## Seamless customer journeys

Our clients are focused on creating agile customer experiences that allow them to navigate a myriad of different purchase journeys. Media plays an integral role here as a bridge between the offline and online components of a sales journey.

Seamless experiences require intense collaboration and working fluidly across disciplines. Media, creative, data, and tech must all come together to create customer interactions that are creative and tailored to a customer's preferences and individual place on the path to purchase.



**Nicole Hurwitz**

Head of Media and Martech, Opella

**Opella.**

As we look ahead to 2025 and beyond, our primary focus must be on putting our consumers at the very heart of our media and marketing strategy. It's all about listening to them and delivering exceptional experiences across every channel and media touchpoint. We need to meet our consumers where they are, and for many, their media habits have evolved significantly. This evolution means we must invest in more channels to effectively reach the diverse generations of consumers we serve. With many choices, consumers often find it challenging to identify the right products for their needs, whether they are shopping in-store or online. Our media strategy must bridge this gap by offering a variety of engaging, relevant, and informative content that guides them through their decision-making process.



**Erika Diaz**

Director of Marketing and Public Relations, The Home Depot Mexico



Our service and product experiences constantly evolve and we have to stay ahead of changing shopper behaviours to ensure a seamless omnichannel customer experience. To support this, Media has to connect our value proposition at the right time and place to the right people. This year we've upgraded our technology to fully integrate all our customer data and insight sources. In 2025 this will help us tailor full funnel, digital first media strategies that are specific to each category line and customer segment for their individual needs.



**Sameer Amin**

Global Director of Data Driven Marketing & Media, Reckitt



In 2025 the cost of living crisis will continue so we need growth levers beyond price increases, demonstrating value and superiority to win share of wallet. Meanwhile Gen AI will be transformative for consumers and brands with a content explosion that makes brand stand out an even greater challenge. So, we need new End to End teams that can plan and activate Media consistently across the full marketing funnel, having common taxonomy, naming structures and technology, all to deliver a more consistent, effective consumer experience.



**Shubhranshu Singh**

Chief Marketing Officer, CVBU at Tata Motors, India



Besides creating evocative content and engaging & impactful 360-degree plans, our top priority for 2025 is to transform consumer engagement by harnessing the power of social commerce and delivering interactive, shoppable experiences. By effectively utilizing 1P data and leveraging Salesforce AI, we aim to craft hyper-personalized journeys that seamlessly connect inspiration, discovery, and purchase. This approach not only addresses challenges like fragmented paths to purchase but also ensures our media strategy fosters deeper connections with consumers while driving commerce at pivotal moments in their journey.



**Christian Bugge**

Marketing and PR Manager (CMO), IKEA Mexico



We believe in the power of data as a key driver for our 2025 media strategy. For driving traffic to store, we have worked hand in hand with Arena to match IKEA data with other media data tools which was essential for informed planning and strategy development. This collaboration enabled us to focus both our media efforts on the best media plan as well as make the right investments for our customer journeys.

O2

## The Convergence of media and creative

We've long been a champion of harnessing the synergies of media and creativity. In 2025, new technologies will enable these disciplines to compliment one another like never before.

Our clients want to test, learn, and scale new applications such as AI powered and optimized messaging – allowing them to navigate platform and customer specific contexts with greater sophistication. This focus means investment in new capabilities and ways of working.



**Fiona**  
Hughes

Global CMO, JDE



**Chris**  
Epple

Vice President Marketing,  
Americas HARMAN



**Will**  
Stacy

Vice President of Cadillac, GM  
China



**Jane**  
Smith

VP, Digital Marketing  
and Media Merrell



By blending creativity with data, we want to bring content and context together in more meaningful ways, ensuring every interaction is impactful.

We are committed to raising the bar on our media strategy, to ensuring our working media works harder and ultimately deliver stronger connections with measurable results.

We are living in a highly transitional time across the media landscape. Between geo-political risk to existing platforms, shoppable social media upending traditional e-commerce, and AI-generated content turning the creative processes on its head, the How, What, Where, and When consumers consume content will be in a state of flux. Creatively, the blurring of the lines between branded content, creator content and influencer content – all of which can be produced via traditional means and now via AI – will open doors for brands to efficiently develop better creative than ever before. As marketers, we need to work with our partners and stay disciplined to develop the right creative for the right mediums to effectively target and engage our core consumers.

We're pivoting our marketing strategy to reflect the new brand and media experience landscape. In 2025 we'll scale up new content creator marketing tests. Generating raw materials of brand assets for a myriad of content creators to tell personalised GM brand stories in their own words. Innovating with media formats in live streaming and mobile first snackable, shoppable content. This approach is radically changing our creative process, our media strategy and how we collaborate with partners. All to drive sales leads for a new generation of customers.

The most important goal is driving greater awareness of our brand and in turn bringing in new consumers to the Merrell portfolio. To do this we need to show up in channels where our target consumers are spending their time and engage them with a compelling message around #1 the outdoors being accessible no matter where you are, and #2 Merrell being a top brand in the space to support them on their everyday needs. Personalization for this is key – getting the right message to the audience through the right channels at the right time. We need to get surgical about the consumer journey and we will need to be nimble to customize the creative and adjust reach and frequency depending on performance.



03

## Effective application of data & technology

In 2025, clients are looking to underpin all their marketing initiatives with data and technology. Access to data and tech isn't enough. Effective implementation, as well as an emphasis on building trust with customers, is essential to fueling sustainable, long-term growth.



**Carol  
Chen**

Global CMO & SVP Shell Mobility, and  
Chairman Shell Brands International

In 2025, the use of AI and data analytics to accelerate our media innovation is a top priority. We expect AI to drive more personalized experiences for our customers. AI-driven target segmentation will be used to identify the most relevant target audiences for our campaigns. We will use AI to create new ways of building engaging content and experiences for our customers. Last but not least, we will leverage the power of AI to maximise the effectiveness of our media investments and drive the highest returns.



**Stephanie  
Rivas**

Director Media Planning & Buying,  
EMEA at Harman International

Harman/JBL is focused on 'enabling self-expression through sound', empowering people to be their true unfiltered selves. However, the echo chamber of social media algorithms coupled with the rise in disinformation means identifying authentic, safe digital environments where we find valuable, trusting audiences is increasingly challenging. In a fragmenting environment, our 2025 priority is audience fidelity – how data can help identify relevant, culturally-sensitive placements and meaningful moments, where we can creatively unite and coalesce individuals into positive minded sub-cultures.



**Isabel  
Gutierrez**

Data & CRM Director, L'Oréal Mexico

User privacy will be a fundamental pillar in media data collection in 2025. Ensuring preferences and protecting personal data is one of our company's global priorities. CSA has played a crucial role in this process, driving innovations such as the implementation of server-side solutions and consent mode, which allow us to collect data responsibly and respectfully, always safeguarding user privacy.



**Christine  
Walton**

Director, Global Paid Media &  
Content Strategy, AMD

AMD's business is focused on the future of AI, accelerating next generation computing experiences so in 2025 our media strategy will also be technology first. This means consistently meeting our customers where and how they are using tech driven media platforms and exploring AI opportunities at the edge of media innovation with partners. Our priority is to show the value this focus can deliver to the business, testing the most relevant new solutions in an accountable way, even when we don't yet have industry benchmarks.



# Opportunity ahead

To prepare for the future, it's necessary to take a step back and ask a fundamental question: what constitutes a meaningful media experience? Across consumers, media partners, and brands, we're seeing that the very definition of media is changing and marketing strategies must undergo a transformation in turn.

Today, media is shoppable, it's tailored to people's passions and how they like to consume stories, and it's all powered by data and tech to provide a seamless experience across platforms and devices. The opportunities are limitless for brands that align their marketing vision to this new expectation for media.

At Havas – with our new core of future-forward capabilities across the media ecosystem in strategy, activation, commerce and data & tech – we're here as a partner to help your brand thrive in 2025 and beyond.



# What are your 2025 media imperatives?

Contact [HMNcomms@havasmn.com](mailto:HMNcomms@havasmn.com)  
to get the conversation started.

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