

25



Trends on the Horizon



in



, 25



2025 Insights from Horizon's
Leaders and Marketing Experts

*Step into the
future with us.*



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01 *The Future Is Agile*

// **Bill Koenigsberg** /
CEO & Founder, Horizon Media

New technologies, shifting consumer behaviors, and an ever-expanding media landscape are rewriting the rules of engagement. At Horizon, we see these not as challenges to overcome, but as opportunities to shape a more agile and impactful future advertising ecosystem.

Today, that ecosystem is grappling with big data—the “oil” of modern marketing. But data alone doesn’t drive meaningful outcomes. The ability to refine and integrate data is what makes the difference. That’s why our approach to data emphasizes the flow of information—the way insights are harnessed and deployed—to fuel smarter decision making.

With our blu. connected marketing platform, we’re engineering data—integrating AI to execute full-funnel media campaigns for our clients more effectively than ever before.

As I reflect on how data and emerging technologies have changed the way we do business, I recognize the definition of an agency is evolving as quickly as the definition of advertising. The traditional holding company model, built on scale for its own sake, is giving way to something more dynamic and responsive.

Today, Horizon isn’t just adapting to these changes—we’re driving them. Our focus on agility allows us to make the best decisions for our clients as we challenge previously-held notions of what agencies do.

By strategically expanding our capabilities to meet and anticipate client needs of today and tomorrow—whether across commerce, social, sports and experiential, moments marketing, multicultural, B2B, full-service marketing and advertising and more—we’re not just keeping pace with the market. We’re shaping its future and, most importantly, delivering on our promise to be our clients’ most valued partner.

02 *2025's Game Changer: The Fusion of Data, AI, and Personalization*

// **Bob Lord** / President, Horizon Media Holdings

As we look toward marketing trends and drivers for 2025, the headline is simple: technological changes will accelerate – reshaping enterprise strategies, consumer behaviors, and innovation. The fusion of technology and marketing will redefine how businesses engage, decide, and compete. Artificial Intelligence (AI) and Large Language Models (LLMs) are not just trends; they represent a transformative shift in creating opportunities and addressing challenges.

Businesses leveraging AI and LLMs will gain significant advantages in understanding and engaging their customers. These technologies democratize access to data, enabling faster, more informed decisions and delivering greater value to consumers. Real-time predictive analytics will become the cornerstone of decision-making, allowing brands to anticipate market trends and consumer needs with precision.

Personalization will advance dramatically. AI-powered tools will create hyper-personalized campaigns and enable real-time feedback loops, offering deeper insights into consumer preferences. This will result in smarter interactions and meaningful value exchanges between brands and audiences, while automation enhances efficiency and relevance across strategies.

Consumer buying behaviors are also set for dramatic transformation. LLMs will provide hyper-personalized recommendations, turning routine shopping into a seamless experience. Conversational commerce, powered by AI chatbots and virtual assistants, will make shopping more interactive and accessible, with voice-activated shopping becoming standard. Enhanced product research, dynamic pricing, and augmented reality (AR) integrations will offer unparalleled convenience and choice, reshaping consumer expectations.

As these technologies converge, 2025 will be pivotal—where advancements of 2024 are primed to take full effect. Businesses must adopt these innovations thoughtfully to craft transformative experiences.

“The greatest danger in times of change is to act with yesterday’s logic.” The question is not whether technology will redefine marketing, but whether marketers will be ready to navigate consumer behaviors increasingly shaped by technology innovations.

Advertising
Shapes —
and *Reflects —*
Our World



03

Where the Money's Going in 2025

// **David Campanelli** /

President Global Investment, Horizon Media

The global advertising industry is projected to grow this year, but at a slower pace than in 2024. Key growth drivers include retail media and other digital channels, but economic uncertainty is leading marketers—especially those in the U.S.—to temper growth expectations.

Industry analyst Brian Wieser forecasts U.S. ad spend growth will slow from 9% in 2024 to 4.5% in 2025, citing economic reasons. Digital channels in the U.S., according to Wieser, grew at a 14.3% rate in 2024 and are expected to slow to 8.4% growth in 2025.

A recent survey by the World Federation of Advertisers (WFA) and Ebiquity underscores this sentiment: only 30% of marketers based in North America said they expect to increase ad spend in 2025, compared to 49% globally.

While the global market is robust, a more cautious outlook in North America reflects economic trepidation. For marketers, the emphasis will be on balancing investment across high-performing channels like retail media while navigating uncertainties in regional markets.



04

Advertising Under Scrutiny on the Hill

// **Jason Lee** / EVP, Brand Safety &
Consumer Advocacy, Horizon Media



The advertising industry is entering uncharted territory as federal scrutiny places it firmly in the national spotlight. December 2024 news of a Congressional probe into Omnicom's acquisition of IPG underscores the increasingly complex 2025 regulatory landscape.

This investigation, led by Representative Jim Jordan, focuses on the companies' ties to the now-defunct Global Alliance for Responsible Media (GARM), a group instrumental in establishing brand safety standards across digital platforms.

GARM's disbandment, following a high-profile lawsuit by Elon Musk, reflects a broader reckoning around the influence of technology giants and the role of advertisers in shaping digital environments.

As culture debates swirl, it's clear that advertising's reach goes far beyond commerce—it's a lever in broader societal and regulatory conversations. The intersection of advertising, technology, and politics has never been more visible.



05 *Governments Tighten Their Grip on Digital Ads*

// **Jason Lee** / EVP, Brand Safety & Consumer Advocacy, Horizon Media

Beyond high-profile mergers and antitrust concerns, governments worldwide are introducing stricter regulations around data privacy, child protection, and platform accountability.

In the U.S., the Department of Justice is investigating major tech companies' market practices, while acts like the American Data Privacy and Protection Act (ADPPA) and the U.K.'s Online Safety Act enforce stricter content moderation and user protections. These measures require agencies and platforms to adapt quickly. Still, Section 230 remains in place.

GARM's Legacy and the Industry's Future

Founded in 2019, the Global Alliance for Responsible Media (GARM) established key industry guidelines like the Brand Safety Floor and Adjacency Standards Framework. These frameworks provided general measures of brand safety (environments not suitable for monetization) and placement suitability (varying levels based on individual advertiser preferences). GARM said its guidelines helped reduce harmful ad placements on social platforms from 6.1% in 2020 to 1.7% by 2023.

GARM's guidelines were widely-accepted and continue to inform industry standards even after its dissolution. Going forward, the industry must determine how to update the guidelines to account for societal or technological changes. Without a central organization to manage revisions, publishers and advertisers may need to fill the gap.

Early discussions about creating a new organization emphasize the importance of independent third-party oversight to maintain industry-wide alignment.

Platforms Remain Protected by Section 230

Section 230 was a measure within the Communications Act of 1934 before it was enacted via the Communications Decency Act of 1996. It remains in place today and protects online platforms from being held liable for content posted by users or other third-parties.

Some argue that Section 230 should be amended to prohibit harmful speech, misinformation, libel, or incitement of violence. Others believe Section 230 supports Freedom of Speech and that implementing changes would prohibit it.

The Consumer, *Today*



06 *Cultural Intelligence Will Redefine Marketing*

// Maxine Gurevich / SVP, Cultural Intelligence, Horizon Media

In 2025, cultural intelligence will be central to how brands build emotional resonance, foster loyalty, and drive impact. As consumers increasingly align themselves with subcultures and value hyper-personalized experiences, marketers must rethink how they engage audiences—not just by observing cultural trends but by embedding them into their strategies.

Subculture Marketing Moves Mainstream

The days of one-size-fits-all marketing are over. In 2025, marketers are focusing on subcultures—distinct, passion-driven communities where consumers connect over shared identities and interests.

For decades, strategies often relied on broad categories like Gen Z or Boomers to guide strategy. But those boundaries don't capture what truly drives people: their passions. Subcultures offer marketers a unique opportunity to connect with audiences across generational divides. Interests like gaming, fitness, or even niche hobbies like birdwatching can unite people from vastly different backgrounds. In a world increasingly marked by polarization, these communities create rare spaces for shared identity and connection.

“Cultural resonance doesn't come from targeting a demographic; it's about understanding the passions that define people's lives.”

// Maxine Gurevich

For agencies, this means identifying the subcultures most relevant to their clients and aligning content, messaging, and media placements accordingly.

By the end of 2025, Horizon Media will be using AI-powered platforms to redefine the agency landscape. Automation will merge with human oversight to deliver the precision, flexibility, and insight marketers need to thrive. Horizon is investing in these innovations to solidify our role as strategic partners, guiding brands through an increasingly data-driven and AI-enabled marketing ecosystem.

Content Upcycling: Second-Life Broadcasting Gains Traction

The lifespan of media content has transformed in the digital age, as nostalgia and online accessibility enable older media to be rediscovered and reimagined. Through memes, commentary, analysis, and remix culture, past content is given new cultural relevance, connecting generations. The trend, known as content upcycling, keeps media perpetually fresh.

Previously, content followed a more linear trajectory: it was released, consumed, and then largely relegated to archives or memory.

Now, thanks to the nature of new social platforms and the proliferation of AI-user generated content, older content is continuously rediscovered and revitalized in new contexts.



**We wrote the
playbook on how
brands use niche
subcultures to
connect with Gen Z.**

Read more on page 35 →

07 *Connected World: The New Data Play for Marketers*

// **Domenic Venuto** / EVP, Chief Product & Data Officer, Horizon Media



Building Trust in a Hyper- Connected World

As devices become more intelligent and interconnected, consumer trust becomes a central issue. Transparency in data use, opt-in mechanisms, and adherence to ethical AI principles will be critical in fostering loyalty and reducing privacy concerns.

In 2025, devices don't just connect to the internet; they connect to each other. With AI-integrated chipsets like Google's Tensor, Apple's A-series, or Qualcomm's Snapdragon embedded in smart TVs, wearable devices, and home robots, the sheer volume and diversity of data being generated is increasing in unprecedented levels.

"Today's devices don't just observe—they anticipate. We're moving from reactive engagement to proactive personalization, where technology dynamically adapts to your needs, preferences, and contexts."

// **Domenic Venuto**

Hyper-connected systems enable fluid transitions when consumers switch devices. For example, today you can start a playlist on your music streaming app, keep listening on your car's entertainment system, and finish the playlist on your home smart speaker.

In 2025, connected journeys like this will become more sophisticated.

Imagine your smartwatch noticing you've had higher stress levels and syncing with your home devices to suggest a guided meditation, adjust the thermostat, and diffuse calming essential oils as you walk through the door.

As hyper-connected systems evolve, agencies and IoT companies will have new opportunities to collaborate and redefine how they engage consumers.

Agencies and IoT Giants Strike the Next Big Data Partnerships

In 2025, the shift toward interconnected technology will accelerate new waves of collaboration between agencies and IoT giants like Google, Amazon, Apple, Samsung, and LG. New partnerships will stretch beyond ad targeting, and focus on the co-development of integrated and dynamic marketing strategies that enhance product experiences and integrate into consumers' daily routines.

Behind
The
Brand



08

Unifying Creativity: Connecting the Dots in a Fragmented Landscape

// **Alejandra Rubio** / SVP, Head of Business and Brand Strategy, One Horizon



Agencies that are able to successfully integrate creative storytelling into their existing areas of expertise will stand out in a saturated market.

Horizon Media launched One Horizon, a full-service advertising agency focused on big-picture storytelling. Partnering with practices across the Horizon Media ecosystem—including 305 Worldwide, HS&E, First Tube, Blue Hour Studios and Night Market—One Horizon delivers comprehensive solutions for its clients.

Creativity is evolving in profound ways, driven by the interconnectedness of digital, physical, and experiential worlds. Marketers and agencies no longer think in terms of isolated campaigns. Instead, they are building cohesive, immersive ecosystems that keep brands at the forefront of consumers' lives.

Stories Become Brand Worlds

In 2025, creatives are more than storytellers—they are orchestrators of interconnected experiences that span every touchpoint.

Today's campaigns are no longer finite; they are open-ended, designed to live and grow across platforms. This shift demands that creatives think beyond the screen, blending commerce, in-person events, and even virtual spaces into a unified brand presence.

GenAI Plugs Media Directly Into Creative Workflows

Generative AI (GenAI) is unlocking creative possibilities that were once unimaginable. Far from replacing human talent, AI enhances creative potential by handling tasks like concept iteration and asset adaptation. It allows agencies to move faster and think bigger, delivering bold, boundary-pushing ideas that align with brand objectives. The future isn't about automating creativity—it's about amplifying it.

“AI will strategically free us from the information overload that comes from the intricacies involved in data mining, profiling, consumer journey building, trend-casting, optimization, creative versioning, and more. This year, the industry will spotlight the importance of craft in advertising, but with an intelligence-backed foundation.”

// **Alejandra Rubio** / SVP, Head of Business and Brand Strategy, One Horizon

Creatives Seek Out Cultural Intelligence

Creatives today must navigate a cultural landscape evolving at an unprecedented pace. Just decades ago, many of today's societal and technological paradigms were beyond imagination. Cultural intelligence—a deep understanding of what resonates with people and why—is where creativity begins.

The pressure to generate the “next big idea” is higher than ever, but so is the potential for impact. By building interconnected, innovative experiences, today's creatives can craft worlds—not only to drive success for clients but to contribute artistically to the broader cultural conversation.

09

AI Changes Everything

// **Tim Rich** / SVP, AI Solutions, Horizon Media

Generative AI (GenAI) is revolutionizing every corner of the advertising industry, from how consumers search to how brands personalize offers and create content. With its rapid adoption, AI is no longer an experimental tool—it's becoming the backbone of the modern marketing ecosystem and strategies.

GenAI is Widely Adopted

GenAI adoption is accelerating, with the number of U.S. adults using GenAI platforms expected to more than double—from 15 million in 2024 to 36 million by 2028, according to Activate Consulting. Today, GenAI already addresses 60% of online searches, underscoring its integration into consumer behavior. Beyond search, GenAI is driving tangible business outcomes: eMarketer reports that 64% of organizations globally are achieving ROI from GenAI, as companies integrate predictive and generative AI tools to streamline innovation and enhance efficiency and optimize campaigns.

This growth reflects a pivotal shift in how businesses operate. GenAI functions as both a creative partner and a data processor, expanding the boundaries of what's possible in marketing. Most of the challenges marketers face this year will not be about AI's capabilities, but rather how effectively they implement and contextualize the technology to achieve their goals.

AI Will Make Dynamic Creative Optimization Common

AI is reshaping media strategies through automation, personalization, and real-time experience adaptation. Technology like dynamic creative optimization (DCO) allows brands to deliver tailored messages across mediums and make 1-1 connections like never before, linking rapidly changing consumer desires with on-the-fly generated creative messaging.

Horizon Media leads the charge with a suite of proprietary AI tools that integrate AI into every stage of the client journey. The blu. AI platform brings together data, technology, and analytics to create end-to-end marketing solutions for clients. Working with the blu. AI platform, a user engages with large language models (LLMs) to generate audience insights, expand targeting functionality, and run smarter campaigns. Horizon's NEON platform, developed by its Night Market commerce unit, applies AI to retail media, helping brands maximize revenue and optimize media investments across retail media networks at the speed of consumers' needs.

AI...With Guardrails

AI's potential is immense, but so are its risks. In 2025, agencies will adopt a "human-in-the-loop" approach to ensure transparency, mitigate bias, and maintain accountability. In this case a human works alongside AI overseeing changes, double-checking calculations, and upholding brand guidelines. These safeguards will be critical as agencies use AI to deliver results that are not only impactful but also consistently reliable and ethical.

Horizon's AI Innovations

blu. AI Platform: Integrates data, products, and analytics to drive seamless, client-centered outcomes. All aspects of the platform harness generative AI for insights, audience building, and campaign optimization.

NEON: Optimizes retail media investments across multiple platforms to maximize revenue outcomes.

Swell.AI: Transforms social content into TV-style creative, helping marketers reach audiences who trust influencers over traditional ads.



10 *Data: A Competitive Edge*

// **Domenic Venuto** / EVP, Chief Product & Data Officer, Horizon Media

In today's fragmented media landscape, data is integral and guides decision-making across every marketing funnel touchpoint. As brands must navigate an increasingly complex ecosystem, success depends on harnessing and unifying diverse datasets to extract insights for real-time campaign optimization.

Horizon Takes a Collaborative Approach to Data

Horizon Media's approach to data is rooted in the belief that no single source is enough to fully understand consumer behavior. By building a flexible, varied, and robust data infrastructure, Horizon enables clients to centralize diverse information sources into a cohesive ecosystem. This allows for better integration, deeper insights, and actionable intelligence.

In an era where precision drives performance, Horizon's agnostic approach of partnering broadly to leverage a variety of data streams sets it apart. These partnerships—coupled with Horizon's expertise in data science—enables faster decision-making and optimization, ensuring agility in a rapidly shifting environment.

Adjusting Media Investments in Real Time is Crucial

Access to real-time data is a cornerstone of Horizon's approach, giving clients the ability to adapt campaigns while they are live, rather than reacting to campaign performance after the fact. By integrating advanced analytics into its proprietary tools, Horizon ensures that brands can use data to act fast—whether that's refining audience strategies or pivoting creative assets to align with evolving consumer behaviors.

11 AI Tech Takes Hold

// **Domenic Venuto** /
EVP, Chief Product &
Data Officer, Horizon Media

The evolution of technology platforms is entering a transformative phase. Once built to manage workflows and enable precise targeting, these systems are now leveraging AI and large language models (LLMs) to become powerful dynamic tools that unlock insights, accelerate planning, and expand possibilities across the marketing funnel.

The AI-Powered Evolution of Agency Platforms

For more than a decade, agencies have built or acquired proprietary data platforms to give clients a competitive edge in targeting and media activation. Horizon Media's blu. has led the field by providing a robust identity framework supported by partnerships with leading data providers, to deliver precision and scale.

In 2025, Horizon's blu. platform will undergo a significant leap forward with even more AI integration. Horizon's blu. LLM deployment democratizes access to even more vast datasets, offering a conversational interface that replaces technical processes and puts powerful insights into the hands of all marketers instantly.

The result will be a transformative shift: marketers querying data, refining audience segments, and extracting consumer insights in seconds, with less reliance on technical expertise. The platform moves beyond traditional media planning to encompass business and marketing intelligence, integrating data from structured, unstructured, and synthetic sources to provide a richer, more accurate 360-degree view of the customer journey.

"AI has finally made the massive datasets we've collected over the years usable, turning information into actionable insights in real time."

// **Taylor Nelson** / SVP, Enterprise Strategy & Marketing, blu.





Marketers Want Flexibility and Innovation

In 2025, AI-driven platforms will redefine how brands seek to interact with agency technology. Historically tied to full-service models, these systems will evolve to offer unparalleled flexibility. Brands with in-house teams will increasingly adopt SaaS-like solutions for self-service insights, while others will benefit from fully managed, white-glove service.

This hybrid approach will meet the growing demand for customization in client-agency relationships. Agencies investing in these platforms will gain a competitive edge, offering solutions that scale with their clients' needs—from audience building to upstream business intelligence.

Synthetic Data Revolutionizes Testing

Another transformative trend of 2025 will be the rise of synthetic data in media workflows. By creating fictional yet realistic datasets, one can simulate real-world scenarios to test strategies without relying on sensitive client information. This innovation will accelerate performance testing, creative optimization, and campaign development, reducing risks and enhancing agility.

Synthetic data will become an essential tool for brands and their partners alike, enabling a low-risk approach to experimentation and allowing faster pivots in a dynamic market. In 2025, expect synthetic data to move from a niche application to a cornerstone of campaign testing and development.

12

B2B Marketers Will Inspire B2C Marketers

// **Chris Hummel** / President, Green Thread

In B2B marketing, advertisers often activate a broader range of tactics across a wider array of channels to reach hyper-targeted customer segments. As subculture marketing and one-to-one personalization continue to rise in prominence, B2C campaigns are increasingly adopting the complexity and precision of B2B strategies. That includes executing a connected media strategy across paid, owned, earned, and shared channels to hyper-target and personalize content for audiences.

As B2C practices adopt more of B2B's characteristic strategies, consumer and business marketing experts will collaborate in novel ways and engage each other in creative conversation.

Meanwhile, the uptick in sophisticated B2B spots in high-profile placements like the Super Bowl, demonstrate how much B2B marketing lately mirrors the creativity and storytelling that historically defined B2C efforts.

Flipping the Funnel: Integrating Marketing and Sales

The silos that once separated marketing from sales are dissolving inside today's organizations. This integration—combined with the democratization of media buying and audience targeting technology—will inspire more sales executives to execute their own demand generation campaigns.

“This will require new degrees of organizational alignment to keep sales and marketing teams on the same page and working towards mutual goals.”

// **Chris Hummel**



The B2B2C Expansion

Some companies that have historically operated in B2C markets are now venturing into B2B2C, unlocking new revenue streams. Consider a mattress brand selling to hotels, or to sports teams. In 2025, more brands will explore this model for the first time, turning to agencies and other partners to help them navigate a dual-market approach.



To engage targeted audiences throughout the revenue cycle, enterprises must overcome fragmentation and complexity and build value thru growth with data-driven, technology intensive modern marketing. **Green Thread, Horizon's B2B practice, helps companies “connect the dots” across their go-to-market with Connected Marketing Strategies that connect audiences, campaigns, channels, content, data, experiences, media, and sellers.**

13

It's Impossible to Ignore the Retail Media Revolution

// **Randy Browning** / President, Night Market

Powering the Pervasive Store

This is the concept that commerce is now pervasive. Today it can happen whenever, wherever, and however consumers choose to engage.



Night Market is a new breed of agency

designed to drive commerce, connections, and conversion across DTC, retail, marketplaces, social and omnichannel – what we call the pervasive store.

Through our integrated, end-to-end solutions encompassing media, creative, customer experience, and digital transformation, we empower clients to succeed in today's complex marketplace.

Once confined to online endemic platforms and low-funnel performance, retail media has become a critical piece of the full-funnel, omnichannel media mix. It spans in-store displays, social, commerce, CTV and shoppable content. Its growth blurs the line between communication and commerce, pushing brands to further customize their digital and content experiences to convert casual browsers to shoppers, shoppers to buyers, buyers to consumers and consumers to loyalists.

Commerce Without Boundaries

This year the advertising industry will embrace what Horizon Media's Night Market coined "the pervasive store."

Retailers are integrating digital media into physical stores with technologies like interactive kiosks, digital shelf displays, and smart shopping carts, transforming aisles into digital touchpoints. This omnichannel approach gives brands a holistic view of the customer journey and unlocks opportunities to boost engagement and conversions across both online and offline channels.





Data-Driven Personalization and AI-Powered Creativity

AI and machine learning are embedded in retail media, enabling brands to provide personalized, proactive experiences.

Tools like NEON, Night Market's AI-powered commerce intelligence platform, optimize campaigns by using advanced predictive models to increase incremental revenue and ROI.

The technology moves investment away from retail media network (RMN) self-reported ROAS to give brands a high degree of confidence when investing across channels and audiences—even down to the keyword level.

Shoppable video—fusing content with commerce—will gain momentum in 2025 as brands host interactive live shopping events and embrace dynamic, real-time content. These experiences not only drive engagement, but also close the loop between content and commerce, helping brands turn eye-catching content into immediate purchase opportunities.

Measurement Matters

As RMNs proliferate, advertisers will face increasing pressure to prove ROI and incremental revenue from their investments. The industry's fragmented attribution methodologies and reliance on metrics like ROAS are no longer sufficient.

Night Market's NEON platform, for instance, offers a neutral and consistent measure of incremental ROI with 97.5% accuracy, delivering insights that drive smarter decisions and more meaningful business outcomes.

Night Market's Tools for Powering the Pervasive Store

NEON: A proprietary AI-powered platform predicting incremental ROI by RMN, by channel, by audience, or by tactic, that we can activate on RMNs or campaign management platforms to boost revenue by 18% on average.

Shoppable Media: Seamlessly blending media and commerce through interactive ad units, live shopping events, and platform-specific integrations so that media investment doesn't stop with a prospect, but spans the shopping experience and commerce path to conversion.

Storefront Management: Full revenue and P&L management down to the SKU level to ensure business outcomes, including Predictive Conversion Scoring for product pages, creative, and SKU performance to improve conversions across marketplaces like Amazon and Walmart.

**Media
Meets
Momentum:**

*Technology
Driving New
Connections*



14

Next-Gen Media: Innovations That Drive Measurable Growth

// **Gene Turner** / President, Horizon Next and President Global Chief Client Officer, Horizon Media

Over the past two decades at Horizon, I've witnessed the media landscape evolve in ways we never could have imagined. When we launched Horizon Next in 2017, our mission was simple but ambitious: to help clients harness the power of data, technology and media to drive sales overnight while building brand over time.

Today, that vision is at the core of everything we do, and the path forward demands constant reinvention.

At Horizon Next, we don't just react to the shifting media environment; we shape it, uncovering innovations that elevate our clients' performance to new heights. Whether it's leading strategic media investment moves for Safelite, expanding customer acquisition strategies for A Place for Mom or building dynamic campaigns for SharkNinja, our work delivers measurable growth across industries.

This year, the art of balancing branding and performance media will play an even greater role in shaping success for our clients. AI is revolutionizing personalization at scale, enabling campaigns that adapt to real-time consumer behavior. We anticipate a continued need for a balanced channel mix as clients leverage video for high-impact storytelling opportunities and performance media to drive next day conversion – and further accountability across all channels.

As delivering measurable growth becomes increasingly vital, we're focused on blending foundational strategies with innovative approaches to investment, analytics, and optimization. This means not only responding to the changes around us but shaping what comes next for our clients and their businesses at lightning speed.

We believe our relentless focus on your business every day will make us your most valued partner. With over 650 team members, \$3.5 billion in annual billings, and a relentless focus on innovation, we are proud to act as an extension of our clients' teams. Together, we'll keep redefining what comes next—one breakthrough at a time.

15

Streaming Evolves, and So Do Advertisers

// **David Campanelli** /

President Global Investment, Horizon Media

// **Michele Donati** /

EVP, Chief Integration Officer, Horizon Media

// **Maikel O'Hanlon** /

SVP, Performance Media & Innovation, Horizon Media

The TV landscape has undergone a seismic shift, driven by the rise of CTV and ad-supported streaming platforms. Streaming giants like Disney+ and Netflix have embraced ad-supported tiers, and traditional cable networks are consolidating assets to retain any competitive edge possible. As the lines between TV and digital marketing continue to blur, advertisers are navigating a more dynamic and fragmented ecosystem.

The OEM Advantage

Device makers like Samsung, LG, and Vizio are playing a larger role in the media mix, leveraging their audience data and control over user experiences. These original equipment manufacturers (OEMs) offer consistent reach and innovative ad formats, positioning themselves as critical players in TV advertising strategies.

Ad-Supported Streaming Takes the Lead

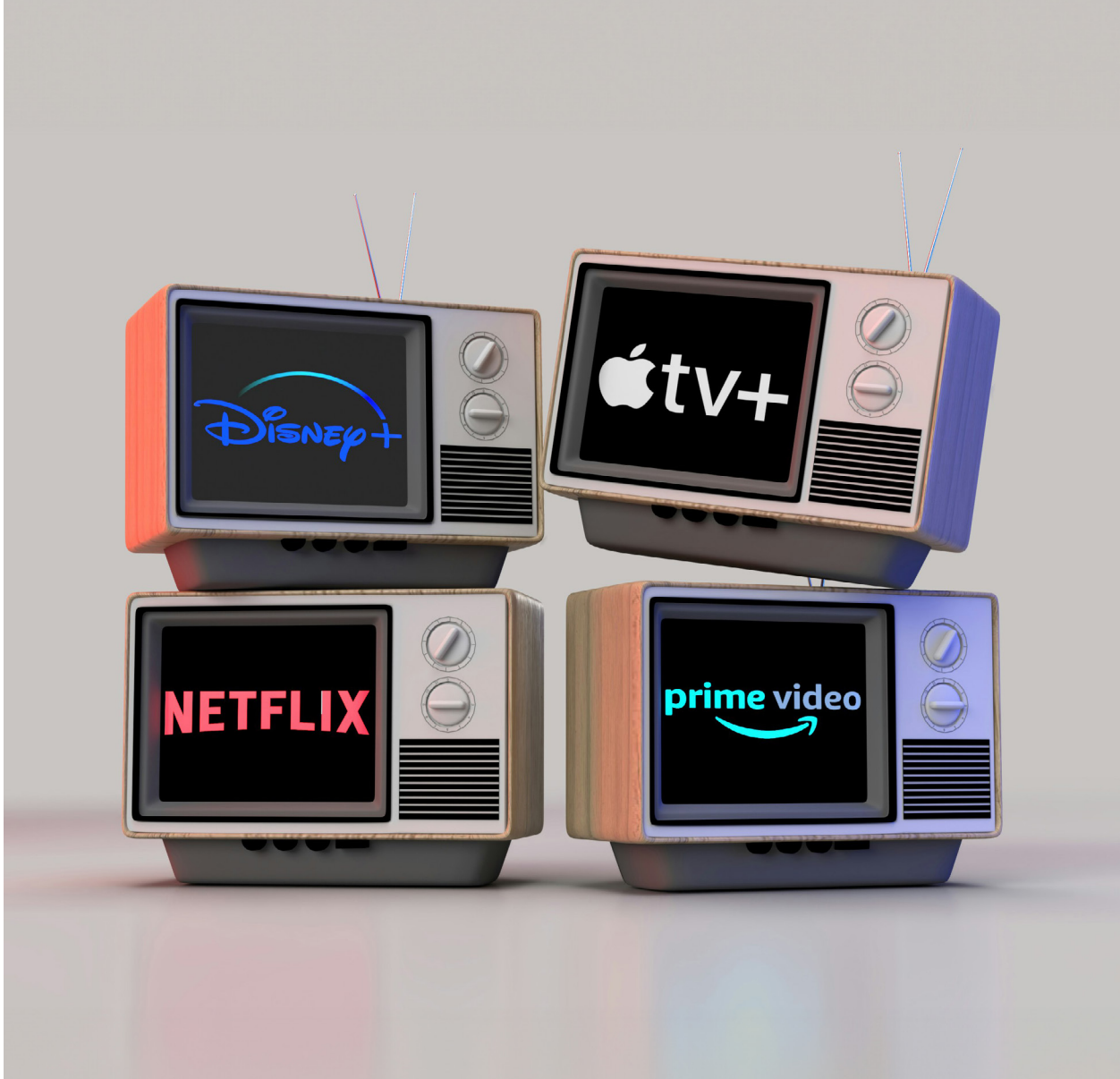
Ad-supported streaming is fueling growth, attracting cost-conscious consumers and driving average revenue per user that compares to (or exceeds) ad-free tiers. According to Activate Consulting, ad-supported tiers saw up to 380% year-over-year subscriber growth between Q2 2023 and Q2 2024. Free ad-supported streaming services (FAST) like Roku are also gaining traction, according to the consultancy, with ad revenues expected to achieve a 15% CAGR through 2028.

Partnerships with platforms like Amazon Prime Video and Roku are becoming essential as brands look to capitalize on these audiences.

Programmatic TV Gains Momentum

Programmatic CTV advertising adoption is accelerating. IAB estimated that by the end of 2024, between 50% and 75% of CTV ads would be bought programmatically. This transition allows advertisers to centrally manage data, optimize reach, and link video investments to measurable outcomes like conversions.

Programmatic buying also democratizes access, allowing smaller advertisers to compete in premium video spaces. Emerging trends like shoppable TV and AI-powered dynamic creative messaging will continue reshaping the landscape.



David Campanelli on Cable Consolidation

Cable TV is rallying its forces for a “last stand,” consolidating assets across networks to strengthen leverage with providers and create scalable audience delivery platforms. This integration could reshape how advertisers approach legacy TV buys in 2025.

Michele Donati on Ad-Supported Streaming

Ad-supported streaming is leading the charge, while consolidated platforms like Warner Bros. Discovery and Disney are accelerating investment in scalable models. Consolidation also makes for easier choices for consumers who value not only variety, but convenience and affordability. These tiers are uniquely positioned to capture the growing broadband-only audience, which will outnumber cable households by 2028, according to Activate Consulting.

Maikel O’Hanlon on Programmatic’s Rise

Programmatic CTV buying is growing at unparalleled speed, with benefits like unified reach and frequency management, and measurable lower-funnel KPI throughlines driving adoption. Expect further developments as channels like audio, out-of-home (OOH), and retail media see programmatic feature maturation that in turn unlock the premise of real omni-channel media activation.

**Essential
Channels
for a
*Fragmented
World:*
Experiential,
OOH, and
Audio →**



16 *Experiential Marketing: Real-World Engagement Drives Consumer Loyalty*

// Andrew Beranbom / CEO, First Tube

Consumer demand for multisensory, participatory moments is fueling experiential marketing, with global spending on live events projected to reach \$160 billion by 2028, according to Activate Consulting.

Expect experiential collaborations to become pervasive this year and span live events like concerts and professional sports games.

This shift reflects a broader trend outlined in Horizon WHY's 2025 report: the "Age of Lore," where entertainment transforms audiences from passive viewers into active participants.

Horizon Media's HS&E and First Tube practices are redefining experiential marketing by merging creative storytelling with advanced audience analytics. Through data-driven insights, these practices enable brands to craft personalized, immersive events.

FIRST TUBE

First Tube refers to the multi-channel engagement opportunity as the **MOMENT ARC**—a framework for engineering strategies that align with key cultural moments and maximize brand impact. First Tube is specifically designed to meet these challenges, combining a full-service creative, digital, and experiential team with its proprietary LiveAMP ad suite tailored to execute with precision against the MOMENT ARC opportunity.



17 *OOH Advertising: Precision, Scale, and Real-Time Adaptability Define the Future*

// **Jill Nickerson** / EVP, Managing Director, OOH, Horizon Media

OOH is one of the most dynamic advertising channels, driven by digital billboard scale, technology, geo/audience targeting, and programmatic. It's increasingly becoming a critical tool for reaching on-the-move consumers in the real world by leveraging location-based campaigns.

Mixing traditional tactics with digital and tech innovation continues to play a big role in crafting creative OOH messaging.

This year, expect brands to anchor campaigns with large-format creativity for impact and storytelling, complemented by dynamic digital OOH campaigns and other tech. Dynamic digital activations contextually adjust messaging in real time to reflect conditions like weather, traffic, sports scores, consumer behaviors, and new AI-generated triggers for localization and personalization.

Dynamic Data in OOH

OOH campaigns can now adapt in real time to audience behaviors, traffic patterns, and environmental conditions, making them smarter and more effective than ever before.

OOH Meets AI

Horizon Media's integration of its blu. platform into OOH strategies via our AMP platform delivers audience targeting, optimizing reach, and amplifying placement and impact.

Regardless of whether our clients are launching a product or driving traffic to store, website, or app, Horizon OOH's performance approach measures brand KPIs and other campaign insights. Then, we apply the merging of campaign insights from OOH performance data with AI-driven solutions toward predictive models with a priority on data quality. This AI approach will add a new dimension to OOH buying in 2025.

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Audio's Golden Age: The Channel That Builds Trust and Delivers Impact

// **Lauren Russo** / EVP, Managing Partner,
Innovation & Performance Audio, Horizon Media

Audio is experiencing a golden age, with consumers spending nearly three hours daily on music, podcasts, and audiobooks, according to Activate Consulting. AI-powered content creation and the convergence of audio and video formats is fueling this growth. Podcasts, in particular, are evolving into video-centric experiences, with 31% of U.S. weekly listeners engaging through YouTube—surpassing Spotify and Apple podcasts.

“We can now prove audio tactics deliver positive performance results across multiple KPIs compared to other channels using the same methodology. This refined solution is a game-changer giving audio a more prominent seat at the table on media plans.”

// Lauren Russo

How Horizon Leverages AI in Audio Advertising

Horizon Media's approach to audio combines strategic partnerships with partners like SXM Media, iHeart, and Spotify and proprietary technology like Intersect and blu. to optimize investment strategy, planning, creative, and measurement. By leveraging AI, Horizon helps brands measure audio's impact across the funnel.

Here's how:

AI-Enhanced Brand Safety: Tools like Barometer's Brand Integrity Cloud use AI to analyze podcast transcripts, ensuring placements align with brand values and customizing inclusion lists to meet brand standards.

Advanced Campaign Monitoring: Magellan AI monitors over 40,000 advertisers, empowering brands to track outcomes and outperform competitors.

Personalized Targeting and Measurement: With partnerships with ArtsAI/Claritas and our proprietary analytics model Intersect, Horizon delivers real-time optimization across audience demographics, cross-channel platforms, and tactics—tracking conversions across devices. ArtsAI's/Clarita's AI creative personalization covers audience, day, time, geography, device type, and weather.

AI-Powered Creative Development: Horizon's partnership with AudioStack enables limitless Generative AI-created iteration. The technology is capable of matching voices to brand tones or exploring new accents and languages, all while tracking performance metrics.

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Multicultural Marketing Adapts to Evolving Data, AI, and Consumer Priorities

// **Karina Dobarro** / EVP, Managing Partner,
Multicultural Business Solutions, Horizon Media



Now Hiring the AI Oversight Team

Teams must assess how AI tools are designed, trained, and implemented, ensuring outputs are equitable and inclusive. This year, agencies and brands will hire and scale AI oversight teams dedicated to this task.

In 2025, multicultural marketing will require brands to adapt to both opportunities and challenges. Advancements in AI present new ways to connect with audiences, but they also risk perpetuating biases and misrepresentations. Meanwhile, privacy regulations and shifting consumer priorities will reshape how marketers engage with diverse communities.

Privacy Laws Impact Data Access

Targeting diverse audiences will become more complex in 2025 as new state privacy laws categorize race and ethnicity as sensitive personal information. While these laws aim to prevent discrimination, their ramifications could reverberate throughout the advertising industry. Without access to demographic data, already underestimated communities risk being further overlooked by advertisers.

States with privacy regulations that restrict the use of race and ethnicity data include: Colorado, Connecticut, Delaware, Florida, Indiana, Iowa, Kentucky, Maryland, Minnesota, Montana, Nebraska, New Hampshire, New Jersey, Oregon, Tennessee, Texas, Utah and Virginia.

Some measurement companies have already removed race and ethnicity data from their ad-targeting products, raising questions about how marketers will ensure accurate representation and effective reach without these insights.

AI and Representation: A Double-Edged Sword

The absence of demographic data creates challenges, but relying on biased datasets introduces others. AI models often draw on datasets that skew toward dominant demographic groups, resulting in outputs that misrepresent or exclude underestimated communities. These oversights risk alienating key audiences.

To address this, agencies and brands must prioritize oversight and rigorous testing of AI tools. Some forward-thinking companies are updating training datasets to be more representative and incorporating human oversight at critical stages of the AI process.

In another testament to how agencies are becoming more consultative in recent years, agencies will take a leadership role in guiding their clients and partners toward responsible AI practices.

Shifting Priorities Across Communities

The 2024 election revealed evolving priorities among racial and ethnic groups. For Hispanic audiences, economic concerns have overtaken immigration as a primary motivator. For the Asian American and Pacific Islander (AAPI) community, the economy has become more important than education—historically viewed as a top priority.

These changes emphasize how important it is for marketers to continuously gather consumer insights and to avoid relying on outdated assumptions when crafting strategies for multicultural audiences.

Consumers Lean Into Authentic Platforms

In 2025, traditional media will lose further ground as consumers gravitate toward social-first content platforms that prioritize authenticity. Platforms like *Spill* are gaining traction as consumers seek out content they perceive as genuine and relatable. At the same time, events like Blackweek and AdColor are prioritizing impactful change over promotional showcases. In 2025, agencies will embrace the shift by supporting platforms, conferences and events that emphasize meaningful dialogue and actionable outcomes.



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Game Changers: Sports Marketing Surges

// **Kerry Bradley** / SVP, Strategy, Horizon Sports & Experiences

Sports marketing is undergoing a transformative shift in 2025, fueled by the rising momentum in women's sports, immersive, tech-driven experiences that blend physical and virtual worlds, and a growing focus on independent and athlete-led media platforms.

Women's Sports Cement Their Place in the Spotlight

Women's sports aren't just having a moment—they're driving a lasting shift in the sports landscape. Viewership is skyrocketing, with the WNBA, NCAA Women's Basketball Championship, and FIFA Women's World Cup setting record-breaking ratings in 2024. New leagues like League One Volleyball and Unrivaled—a professional 3v3 basketball league debuting in January 2025—are creating opportunities for fans to engage more deeply and for brands to invest in a rapidly-growing market.

Ad Dollars Follow Rising Fan Demand

63% of general sports fans wish there was more coverage of women's sports on major networks, according to a 2024 Horizon study.

CPMs for the 2023-24 WNBA season playoffs ballooned from \$80 to \$180 before selling out. Advertisers that invested ahead of time locked in advantageous rates.





Tech Redefines Fan Experiences

Teams and leagues are adopting AI, AR, and VR to deliver hyper-personalized experiences, allowing fans to connect with their favorite players and teams in new ways. From tailored content to real-time in-game entertainment, these tools create immersive opportunities like AR visualizations of live stats or virtual meetups with players.

Integrated betting and gaming is also reshaping sports engagement. Legal sports betting markets continue to expand, merging with broadcasts and fan experiences. Esports and gamified experiences, including fantasy sports, are particularly effective at capturing younger demographics.

Emerging Sports Media Platforms

Meanwhile, the rise of D2C platforms, like Apple's MLS deal and Amazon's NFL coverage, is changing how fans consume sports. These platforms emphasize convenience and exclusive content, offering fans unique access to behind-the-scenes moments and custom viewing experiences.

Storytelling remains a key driver of fan loyalty.

Fans are looking for more off-the-field narratives shared as social media highlights, docuseries, or podcasts like *New Heights with Jason & Travis Kelce*.

hs&e

Horizon Sports & Experiences

HS&E helps brands seize opportunities in sports marketing by developing strategies for high-growth areas like women's sports and emerging leagues like Unrivaled 3v3 basketball. HS&E identifies impactful entry points for brands. It's known for creating custom IP, like the Pickleball Slam, and driving fan engagement through innovative tech, storytelling, and immersive experiences.

HS&E can help craft custom strategies—from sports media planning to one-off activations, full marketing campaigns, or sponsorships.



21 *The Social Media Crossroads: Platforms, Trust, and New Frontiers*

// Jason Lee / EVP, Brand Safety & Consumer Advocacy, Horizon Media

This year platforms face challenges around moderation, brand safety, misinformation, and regulatory scrutiny. Advertisers are grappling with a fast-changing ecosystem, where trust, innovation, and cultural relevance define the success of platform strategies.

X: Rebuilding Trust in a Polarized Environment

This year, X will remain a conundrum in the social marketplace, struggling to regain advertiser confidence amidst its turbulent ownership under Elon Musk. While the platform has made overtures to marketers through initiatives like profile tiers and professionally produced content ventures, it's yet to fully overcome the reputational damage caused by its controversies.

As competitors vie for X's displaced advertisers, brands are left weighing the risks and rewards of engaging with the platform, particularly as debates over free speech and content moderation continue to unfold.

TikTok: Uncertainty Looms

TikTok faces a pivotal year as regulatory scrutiny heightens in the U.S. and becomes even more bi-partisan. The platform's looming sale deadline has advertisers

questioning its long-term viability. Uncertainty surrounding its future calls for contingency planning and diversification of platform strategies.

The ongoing debate and contended legislation surrounding TikTok's ownership by China-based ByteDance highlights imminent changes in data security, particularly concerning international relations with countries designated as U.S. 'foreign adversaries'.

Consumers Look for the Source of Truth

The proliferation of user-generated content (UGC) and independently produced media will create an information ecosystem that continually grows richer and more accessible—but also more fragmented and unreliable. With misinformation spreading at an unprecedented pace and trust in legacy outlets at an all-time low, consumers are turning to alternative sources like YouTube, podcasts, and social-first content creators.

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Authenticity Influences Us

// Sarah Bachman / EVP, Head of Blue Hour Studios

Influencer marketing is entering a new era this year, characterized by its meaningful, long-term partnerships with creators. More brands are leaving behind transactional, one-off deals to pursue authentic collaborations that resonate with niche audiences and fandoms.

Shared Values Over Surface-Level Similarities

This year, expect to see marketers challenge the traditional assumption that influencers must resemble their target audiences.

[Research by Horizon Media's Blue Hour Studios](#) reveals that shared values and interests—not demographics—are the most impactful criteria for creator partnerships today.

As a result, more brands will prioritize quality engagement metrics over follower counts when engaging influencers. The outdated “macro” and “micro” influencer distinctions are less relevant than they used to be in a market where reaching specific groups is often of the utmost importance.

New Tech Looks Beyond Superficial Metrics

As the industry matures, brands are leaning into omnichannel influencer strategies with an arsenal of new tools and technology like BHS' Swell Audience Network—a talent platform that matches marketers with creators using data and AI, and Swell.AI—a tool that presents social content in a made-for-TV format.

Platforms like these allow brands to move beyond social media, integrating talent into broader campaigns that can include programmatic ads, experiential events, CTV, and CRM strategies.



swell

Blue Hour Studios' Swell Tools

Swell Factor: A custom, weighted index ranking talent by relevant interests and values.

Swell Rating: A 1-10 score based on BHS' proprietary formula that looks beyond a creator's follower count to evaluate the partnership potential.

Swell Brief: Balances talent authenticity, brand messaging, and audience relevance.

BLUE HOUR

— STUDIOS —

Blue Hour Studios is a full-service social and influencer agency that makes brands unmissable. We go beyond demographics to build influencer, creator, and social-first campaigns that connect deeply to audience interests, earn outsized attention, and deliver full-funnel results.

**Ethics,
Privacy
& Progress:**

*The New
Org and
Partnership
Guide*



23 *DEI Won't Die: It Will Strategically Evolve*

// **Latraviette Smith-Wilson** /
EVP, Chief Marketing & Equity Officer, Horizon Media

In 2025, diversity, equity, and inclusion (DEI) will not only endure targeted political attacks but will emerge stronger and more strategic. It will survive in part because of, not in spite of, the orchestrated efforts to discredit and dismantle it. The challenges of recent years will catalyze a necessary DEI transformation, shifting what has been viewed as a moment of reckoning into a moment of awakening. This awakening will drive the innovation necessary for DEI to fulfill its transformative potential as a cornerstone of future-ready organizations.

The next evolution of DEI – or its reimagined acronym equivalent – will further sharpen focus on leveraging equity, inclusion, and diverse experiences and perspectives to drive superior organizational performance. Research consistently ties inclusive practices to greater success – more cash flow per employee, higher revenues, and stronger financial outcomes – underscoring the critical need to embed DEI into core business strategies. Forward-thinking companies will integrate DEI across operations, culture, and values, moving beyond HR-centric programs to enterprise-wide priorities with measurable outcomes. Advanced technologies like AI and data analytics will play a pivotal role in enhancing accountability, tracking progress, and identifying gaps with precision.

Simultaneously, as inclusive practices enhance both organizational performance and consumer engagement, the most effective marketing will

increasingly reflect this strategic integration of DEI. Inclusive storytelling and personalized experiences are not just meaningful; they are proven business drivers. With consumer bases becoming more diverse and values-driven, brands embedding inclusivity into their messaging, product development, and customer experiences will thrive. AI-powered tools will enable marketers to create hyper-personalized campaigns that authentically reflect varied identities, while data analytics will help ensure equitable representation and mitigate biases in advertising content. As social responsibility continues to be a priority for consumers, companies will also have an opportunity to double down on purpose-driven marketing, linking their DEI commitments to tangible community impact and aligning with customer values.

As demographic shifts redefine workforces and consumer bases, companies prioritizing DEI will not only attract top talent and foster innovation but also reshape marketing narratives to celebrate inclusivity and equity, seamlessly integrating DEI into both internal operations and external messaging. These businesses will reframe the competitive edge, positioning themselves as the standard for sustainable success and proving that inclusion is not just a driver of progress but a prerequisite for prosperity.



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The Future Is Measurably Green

// **Jean-Marc Papin** / SVP, Media Technology & Sustainability, Horizon Media

In 2025, sustainability is no longer just a priority. It's a mandate—consumers demand it, governments regulate it, and stakeholders scrutinize it. Marketers in 2025 must ensure sustainability initiatives are measurable, impactful, and authentic.

Consumer-Centric Sustainability Campaigns Will Proliferate

More consumers are prioritizing eco-friendly products, and the demand increasingly spans industries and political lines. Even in an inflationary environment, they're willing to pay 9.7% more for brands that are sustainably produced and sourced, according to a recent PwC survey.

For marketers, it means there are more opportunities to connect with conscious consumers across the channels they visit. Agencies have a critical role to play by connecting their clients to these opportunities. They should keep an eye on the rise of sustainability-focused publishers, like *The Cool Down*, which launched in 2022 and has become a go-to consumer-facing platform for sustainability news. Other players, like *We Don't Have Time*, which connects brands to consumers through sustainable content, Vox Media, and even Netflix, are expanding their programming with sustainability-focused content.

"Brands that will win consumer trust in 2025 will be the ones that don't just talk about sustainability but prove their commitments with measurable outcomes."

// Jean-Marc Papin



Regulatory Compliance Takes Hold Mid-Year

As consumer interest grows, so does regulatory scrutiny. In 2025, publicly-listed U.S. companies will begin ESG reporting under updated SEC guidelines. By 2026, California's Air Resource Board is set to introduce stringent emissions disclosure requirements. Agencies must help their clients embed sustainability metrics into campaign planning, ensuring carbon emissions are measurable and trackable.

Despite the potential for federal rollbacks given the incoming presidential administration, brands can still take a stand by aligning themselves with global trends and state regulations that prioritize sustainability.

The value in "bucking the federal trend" is already evident in industry leaders' actions. Progressive brands are self-enforcing stricter emissions and reporting standards.

Agency Groups Remain Under Pressure

It's not just regulators watching, as calls have increasingly been amplified for agencies to cut ties with companies that do not prioritize sustainability. Agencies will likely face increasing pressure this year to align their work with sustainability values—or risk alienating talent and clients, and eroding public trust.

The Regulatory Landscape

Regulations evolve rapidly, from ESG mandates in the U.S. to Europe's Corporate Sustainability Reporting Directive (CSRD).

In the absence of more federal regulation in the U.S., companies must pay attention to state-by-state rules. Establishing expertise in compliance will be critical this year, as agencies are increasingly called upon to guide clients through these challenges.

Although CSRD is an EU regulation, it impacts companies with activities in Europe or headquarters in the region. Ninety percent of Horizon Media's EU-headquartered clients are requesting disclosure and certified Net Zero goals.



25 *Navigating What's Next: The Blueprint for Transparent Partnership*

The marketing world is transforming at breakneck speed – with AI innovation, shifting consumer expectations, and mounting regulatory demands rewriting the rules. In this evolving landscape, one constant stands firm: trust, collaboration, and transparency aren't just ideals; they're imperatives.

In 2025, success won't come from maintaining; it will come from mastering the art of anticipating change and embracing reinvention. The key? Aligning priorities across an increasingly intricate ecosystem of brands, platforms, and agencies.

Some may see this as a challenge, but at Horizon, we see it as opportunity. By fusing cutting-edge technology with cultural intelligence and purpose-driven strategies, we're not just navigating change; we're leading it.

The future belongs to those who embrace agility, authenticity, and accountability. For those bold enough to lead, the goal isn't just staying in the game – it's rewriting the playbook.

Let's write the future together.

Chat with us at connect@horizonmedia.com →

We are horizon

connect@horizonmedia.com →



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