

A horizontal bar with a dark green segment on the left and a yellow segment on the right.

**10 trends**

# Media consumption





# Overview

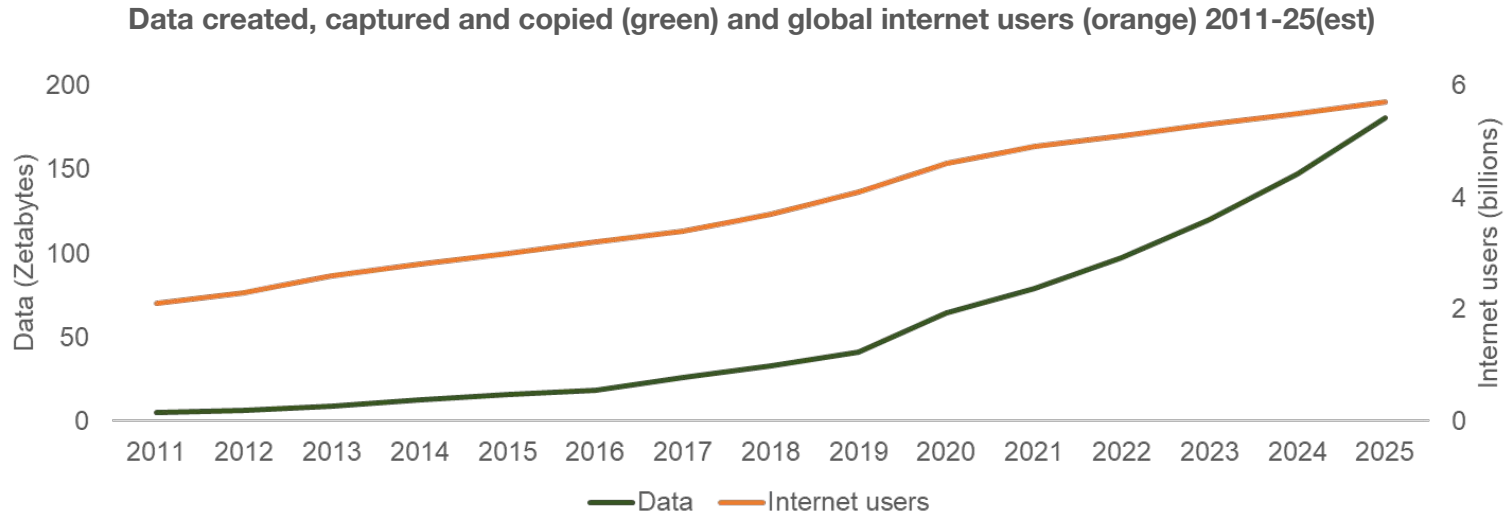
Media consumption - covering the activities and motivations involved with radio, TV, print and the internet - is one of 14 dimensions that we use to examine trends in UK consumers and society. Here we outline ten key trends in this area from our trend bank. These trends will create new opportunities and risks to many organisations in coming years.

'Media' is a hugely important sector for the UK in many ways: The UK has the world's third largest advertising spend at >£30bn/year, while the wider digital elector contributes over £100bn to the economy. The population is not only online both at home and when mobile, but consumes media for about a third of waking life: Technological innovation is set to further change the way content is created and consumed in coming years.



# Global context

Global media trends are cultural and technological: Technology and infrastructure development supports a more expansive, faster internet. The subsequent opportunity to personalise content is creating new business models for media organisations, but fuelling the fragmentation of societies along cultural and political lines (US Nat. Intelligence Council).





# 10 UK trends



01. Internet plateau

02. Ad storms

03. Peak Google?

04. TV decline

05. Rise of video

06. Personalisation

07. Radio's revolution

08. Newspaper's twilight

09. News fatigue

10. Creators bloom

# Internet plateau

## 01

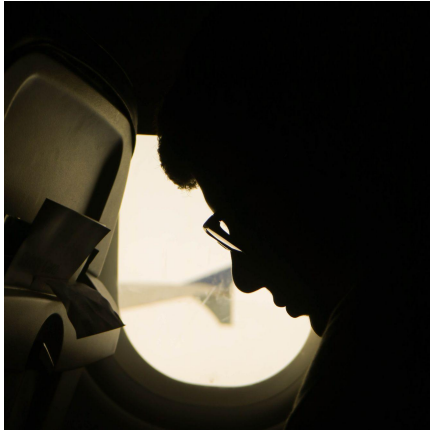


Photo by [Joshua Sukoff](#) on [Unsplash](#)

**About:** Time spent on the internet doubled between 2005 and 2014, from 10 hrs/week to 20 hrs/week. However, after reaching 25 hrs/week in 2018, it plateaued thereafter.

**Responses:** Media consumption, particularly social media, is increasingly understood to create mental-health issues. In response, innovations emerged to help people to reduce their digital media-consumption including wellbeing apps, screen time trackers, detox retreats and meditation activities. The company “Digital Detox” provide immersive experiences and daily challenges to help their customers have healthier digital lives.

**Future business opportunities & challenges:** Smart devices will reduce the need to be online: e.g. smart fridges place grocery orders; home hubs (e.g. Alexa) switch the household energy account. With consumers also more “privacy-aware”, the trend will create an onus on organisations to create new channels that reduce their consumer’s efforts with interacting online.

# Ad storms

## 02



Photo by Tânia Mousinho on Unsplash

**About:** US research in 2021 found that people experience about 3,000 different ads a day in one guise or another. The level in the UK is likely to be only marginally lower based on expenditure. UK advertising revenue grew 8% in 2022, with further growth set for 2023 and 2024 (WARC). Competition for consumer attention gets more intense.

**Responses:** Organisations are adapting their strategies, such as by increasing native marketing, whereby advertising is integrated into their website or platform, personalisation, and attempting to appeal to consumers' deeper values.

**Future business opportunities & challenges:** Organisations will necessarily develop a new marketing portfolio with a different emphasis on native-, bought- and earned-media. Personalisation becomes increasingly important, as will the ability to co-create highly relevant products that closely meet consumers' demands.



# Peak Google?

## 03

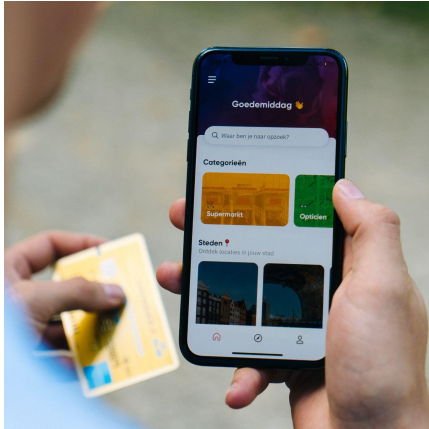


Photo by CardMapr.nl on Unsplash

**About:** In the UK, Google remains dominant in search (97%) and is the biggest email provider (26m accounts). Parent company Alphabet also owns YouTube and many other tech companies. Globally the company continues to grow revenue, but at a slowing rate (5% for YE2023 vs 10% for YE2022 and 41% for YE2021).

**Responses:** Competition and regulation has challenged Google on multiple fronts. The recent rise in ChatGBT has been suggested to threaten Google by creating a disruptive alternative to traditional search. Google, however, have diversified into areas ranging from cloud computing to autonomous vehicles.

**Future business opportunities & challenges:** Google will remain strong while moving into new areas of innovation such as ambient computing, where computing seamlessly integrates into the environment. Consequently, Google's R&D will continue to produce innovative B2B offerings for SMEs e.g. Google launched Google Ads, new commerce tools, and a Google Analytics upgrade in 2022.



# Decline of TV

## 04



Photo by Peter Geo on Unsplash

**About:** In 2022, TV watching from broadcasters – across linear channels, recordings and on-demand – was 9% less than in 2020 and 25% less than in 2011. TV now has less than a 50% share of video views and only about a fifth of viewing figures for 18-34 year olds.

**Responses:** With the decline of TV viewing (and print media), a digital brand has been important for most businesses for years, but its importance only increases with time (although TV retains some unique impactfulness for advertisers.) Organisations are particularly increasing efforts to connect with younger audience via social media. There are now many dedicated social media consultancies e.g. Brave Bison, Favoured, Crowd.

**Future business opportunities & challenges:** Businesses will need to continually track changing media trends, platform preferences and media behaviours of different consumer groups. Consumer trends have seen some larger brands partner with gaming companies, for instance, to distribute their brand (e.g. EA Sports and Nike).

# Rise of video

## 05



Photo by Alexander Dummer on Unsplash

**About:** The volume of UK video viewing doubled between 2018 and 2023, with UK consumers watching more video-on-demand. TikTok has grown rapidly internationally and in the UK, where it has 23m users after only being accessible from 2017. Meanwhile, Video is now used by 93% of marketers worldwide (Wyzowl).

**Responses:** Advertisers are responding to video trends with more niche and personalised content to retain audience engagement, and are increasingly using AI to achieve it. Agencies like Seen are already specialising in “personalised video” where personalised messaging is added to promotional video, based on audience data.

**Future business opportunities & challenges:** Analysts estimate Augmented Reality (AR) and Virtual Reality (VR) technologies will grow by >50% year into the mid 2020s, and transform the video landscape. Other market trends will include the rise of immersive experiences, virtual tours, and interactive storytelling, within a battleground for consumer engagement.

# Personalisation

## 06



Photo by Localize on Unsplash

**About:** Attitudes have changed in the privacy vs. personalisation trade-off, such that various surveys (e.g. Salesforce) now suggest 4 in 5 global consumers expect personalisation. Consumers willingly trade data to increase the relevance of content.

**Responses:** Marketers have moved to a broad range of data sources to be able to personalise content, with 3 in 4 global marketers using consumers' digital identities, inferred interests of consumers and anonymised digital identities. Several companies like Acxiom provide businesses with personalised data sets to assist.

**Future business opportunities & challenges:** Marketers “walk a tightrope” between manipulation and personalisation, particularly with “hyper-personalisation” which increasingly relies on using sophisticated algorithms in conjunction with a consumer’s unique data. New emerging technologies will offer marketers additional opportunities, including emotional personalisation and voice/speech personalisation, before merging with Web 3.0 immersive technologies like virtual reality.

# Radio's revolution

## 07



Photo by Eric Nopanen on Unsplash

**About:** On the surface, radio consumption is relatively flat (at 20hrs/person/week). (Ofcom). However audio content consumption is changing radically with the rapid growth of on-demand music subscriptions and podcasts, which both doubled their reach between 2017 and 2022, to 33% and 23% of the population respectively (Rajar)

**Responses:** Podcasts have effectively disrupted the traditional radio market, with a plethora of content for highly specific topics. Catch-up radio listening is also popular, particularly amongst the over 55s. A broader audio media landscape provides additional reach for organisations, with listeners frequently on the move, studying and working while listening. There are now >5m podcast titles on Spotify, with many brand involved.

**Future business opportunities & challenges:** Audio content represents a new channel option, particularly for B2B brands, as a way to establish expertise via content partnerships and syndication. As with all other channels, analytics into audio content offers new insight and opportunities to build a sales funnel.

# Newspaper's twilight

## 08



Photo by Thomas Charters on Unsplash

**About:** National expenditure on newspapers declined from £9bn (2005) to £3bn (2021). Reuters reported that only 17% of the UK now buys a daily newspaper, while Ofcom found only 38% use newspapers as their main source of news, c.f. 51% in 2018. There is a heavy age-dependence on news consumption patterns: 79% (12%) of 16-24 (65+) year olds use social media, compared to 12% (95%) of each group that use TV.

**Responses:** News has fragmented, with major newspapers contracting in response. Social media has become an authority source for younger audiences, resulting in many brands moving advertising spend to that medium and away from print and radio.

**Future business opportunities & challenges:** Brands face the challenge of reaching fragmented audiences while ensuring that they retain the trust of their core base, particularly to explain policies related to their category where there is controversy or confusion. 'Brand-authority' will become increasingly important for all companies.



# News fatigue

## 09



Photo by Markus Spiske on Unsplash

**About:** Trust in the UK media is the lowest in the world according to the global Edelman survey, which measures public trust in institutions. Only 55% of people now trust the BBC compared to 75% in 2018. The percentage interested in the news declined from 70% in 2015 to 43% in 2022: Politics, bias and conflict in the media was found to be causing fatigue and disengagement (Reuters).

**Responses:** Businesses are now finding that they are facing brand fatigue, such as in the beauty category. A study by marketing agency GfK found consumers also suffering from wider “purpose fatigue”, with purpose-driven advertising achieving poorer results than standard marketing in tests. GfK concluded that companies should “stop turning themselves into heroes and start turning (other) people into heroes” in their marketing.

**Future business opportunities & challenges:** Brands will need to walk a tightrope between taking ethical positions and appearing egotistical and moralising in ways that alienate mainstream consumers.

# Creators bloom

## 10



Photo by Soundtrap on Unsplash

**About:** One in four Brits describe themselves as a “content creator”, accounting for 16.5m creators in the UK. The number doubled between 2020 and 2022. 51% of creators earn money from their activities (Adobe).

**Responses:** Companies have formed relationships and partnerships with creators, giving them the opportunity to increase their influencer-marketing reach, and use unique user-generated content. Adobe have particularly pushed their creative software tools towards the creator community in recent times. Freelance sites like Upwork create hubs for businesses for find various types of content creators in the UK and wider afield.

**Future business opportunities & challenges:** Individual creators will be further spurred by so-called synthetic media (i.e. created by AI). However, challenges exist by way of reputational risk, reliance on content creators when platform algorithms change, and creating a distraction from core content. All brands will also need to manage the growing threat of deep-fake videos and sophisticated forms of fraud.

# Factors affecting the future





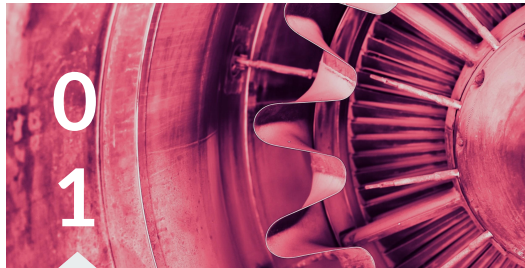


Perspectives on the future: Bain & Company

“Media is blurring its shape. Lines between media types are disappearing, consumers are creators, and entertainment is daubing tech and retail all over itself.

Content is ever present, consistent across platforms, and individually personalized. As our physical world blends with virtual worlds, entertainment realities are changing, too.”

# Key factors affecting the future UK trajectory



## Personalisation and power

Media content is set to become ever more personalised. With AI, brands may get to know more about a consumer than they do, creating ethical conflicts relating to privacy.

## Reconciliation v. fragmentation

Trust in the BBC has declined, but competing media is fragmented. The future landscape will depend on the emergence (or not) of new unifying and credible actors.



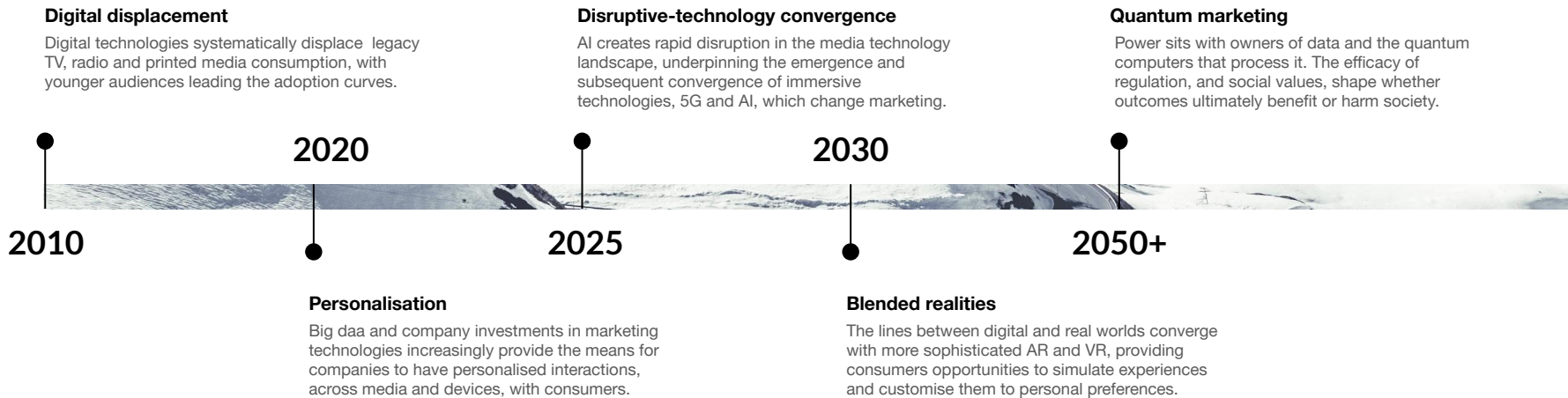
## Evolution of Ai powered AR & VR


Augmented and virtual reality offers countless new experiential possibilities for ads and content, but also raises worries about “deep-fake”, fraud and misuse.





# Timeline





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