

What is the likely impact of Artificial Intelligence on the media industry?

GfK Insight Roundtable 2023

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Our mission



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Our mission

The last year saw a significant increase in the debate around Artificial Intelligence (AI). While forms of AI and machine learning like chatbots and predictive algorithms have been in use for some time, interest in (and concern about) AI has been stimulated by Generative AI, artificial intelligence that generates text, images, or other media. Text tools like ChatGPT and graphics packages like Midjourney are 'trained' by input data to learn patterns and structure so they can generate new data that has similar characteristics. This is a significant development, as experts seek to understand the likely impact on society, the economy, and the future of mankind.

For the seventh in our series of industry white papers in which we consult industry experts GfK set out to understand how the media business specifically is reacting and adapting to the opportunities and challenges presented by Generative AI.



2021 report

2022 report

Thought leaders from across the media ecosystem came together to discuss their early experiences with Generative AI and their company strategies. We focused on three specific areas where AI is already having an impact: content, advertising, and media data. This report summarizes the fascinating discussion that followed, examining how relevant AI could become in each of these areas and the strengths and limitations of what it can do. What are the implications for intellectual property? What are companies' early experiences with AI and their likely plans? Will AI simply augment existing activity or will there be areas where it completely replaces it? `

This white paper summarizes the key findings. The roundtable took place on 21st October 2023 and was moderated by media industry expert Richard Marks.

The participants were:

- **Craig MacDonald,** McKinsey & Company
- **Graeme Griffiths,** IPA
- **Gufeng Zhou,** Meta
- **Matt Deegan,** Folder Media
- **Margo Swadley,** BBC Studios
- **Marco Robbiati,** Omnicom Media Group
- **Scott Thompson,** Publicis Media
- **Rick Hoving,** Ster
- **Moritz Fries,** ProSiebenSat.1 Media SE
- **Lee Risk,** GfK





Management summary

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- There is still no complete consensus on the definitions of AI and Gen AI and for many it is not entirely clear where machine learning ends and Gen AI begins. Meanwhile, the vendor landscape is seen as being the ‘wild west’.
- Nonetheless, our panel of execs from across the media industry are highly engaged with the concept of Gen AI and see it as a crucial topic for the future of the industry.
- Most companies are taking a proactive stance to understand the opportunities AI offers. Their employees are exploring and experimenting with AI, but there is a danger of being ‘thrown in the deep end’. There is a real need for company guidelines and industry regulations to help mitigate the risks, both operational and legal, in the use of AI, whilst still empowering execs.
- In terms of content generation, the greatest impact of Gen AI may be less on premium productions, but more to enhance user-generated and long-tail content, reducing the barriers to producing high-quality programming.
- There are clear perceptions that Gen AI can only be as good as the data it is trained on, that it may have a tendency towards the generic and the average, and that it can be a useful tool for creatives as opposed to taking the creative step itself.
- There is some skepticism about the concept of Gen AI creating original creatives for advertising campaigns, with a view that AI may tend to ‘regress to the mean’ given that it is trained upon what has gone before. It may have more impact on the production of performance ads aimed at activation, than on ads promoting brand values.



- There may be more initial opportunities for Gen AI to assist in the adaptation and personalization of campaigns to increase relevance and facilitate hyper-targeting. However, concern was expressed that excessive adaptation could actually damage long-term brand identity and equity.
- For both advertising and content there is early evidence that Gen AI trained on data sets that reflect societal biases and stereotypes is in danger of reflecting those biases back, particularly when it comes to gender roles. Gen AI content may create a feedback loop or filter bubble.
- There is a clear opportunity for Gen AI to use object recognition to recognize and categorize creative elements that can then feed into ad testing and campaign evaluation. This will have a major impact on market modeling and media planning.
- Gen AI could also facilitate the democratization of media buying, lessening the barriers to entry for companies who may not have the skills to design ads and buy media.
- Whilst Intellectual Property is a concern, particularly when it comes to the data used to train Gen AI models, there is pessimism about the ability to protect or monetize content in practice. With so much data in the public domain, paid licensing may not be a realistic option.
- There is excitement around the use of AI to analyze data sets, offering both scale and speed to insights. Pattern recognition may lead to insights that would not otherwise be evident. Large language models and AI trained on past research and data may also offer opportunities to test campaigns and content without the need to do survey research, but again there is concern whether this would eventually lead towards generic rather than leftfield or game-changing creatives.
- Ultimately at its best Gen AI can be an enabler, a tool that can augment rather than replace creativity, by automating labor-intensive tasks to allow execs to focus on what really matters, namely enhancing skills. At its worst, it could replace execs with an average version of themselves. In the long term, the threat to media jobs could come not from AI, but from those execs who have a better understanding, and make better use of, AI than they do.





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Early experiences with Generative AI

To set a context for the conversation, our media experts shared their early experiences with Gen AI. There was general agreement that Gen AI marks a potentially huge step forward in many areas and is likely to prove highly disruptive in the short term as its application is explored. Most companies are unwilling to stand still and wait for the wave to hit them, rather they are keen to understand and be prepared for the likely magnitude of change.

Pro Sieben, the German media group, has been involved in AI for some time as an area of investigation for their data strategy teams, engineers and specific AI product teams. The focus has been on activities that can be automated, but also on applications for content creation and program planning and scheduling.

The keywords that apply to Gen AI at the moment are ‘experimentation’ and ‘exploration’. Some media execs are happily throwing themselves in at ‘the deep end’ while others are more cautious, but all have at least some experience and early insights. There is real innovation underway that could impact operations from content to media sales, administration and human capital development."

"I think we're in the early days. Experimentation, exploration. There is considerable interest – we ran an internal data & tech conference recently and had multiple sessions on AI. It is definitely the hot topic of 2023!”

Margo Swadley, BBC Studios



Our media leaders flagged up a number of important issues:

The need for clarity: Gen AI is more than just machine learning

As highlighted in our introduction, there is a lot of potential confusion about where 'traditional' machine learning ends and Gen AI begins. There can be a danger in activities having the label 'AI' slapped on them as a rebrand, much as many statisticians found themselves rebranded as 'Data Scientists' a decade ago. The situation is not helped by AI vendors themselves, with the vendor landscape described as the 'wild west' in the rush to market new tools. As Craig MacDonald of McKinsey relates, conversations with clients often need to start with agreeing on what AI actually is:

"I like the separation between traditional machine learning and how Generative AI is adding to that because I have found that with a lot of the work that I do, there's a 10 minute conversation about "what are we talking about here? Let's just call machine learning Generative AI now and rebrand everything?" You know, once you get through that conversation, it comes down to what's the impact on content generation, which is purely a generative AI application."

Craig MacDonald, McKinsey

However, it's important to note that the advent of Gen AI does not somehow supplant wider applications of Artificial Intelligence, which has always been an umbrella term for many technologies that use deep learning techniques.

"Although we're focusing on Generative AI today, I'd like to highlight that AI is an umbrella term for many use cases. While different definitions vary in details, machine learning and optimization are commonly seen as important branches of AI."

Gufeng Zhou, Meta



The need for guidelines and principles

Media organizations should be able to benefit from their employees' enthusiasm to investigate and experiment with Gen AI applications, but need to avoid the potential pitfalls in the process.

As a result, companies are working on internal guidelines for their staff to help them avoid any risks involved in the use of open-source tools. In the UK, the IPA - the media agencies' trade body - is already looking to establish frameworks that will give its members guidance. It is also involved in initiatives with ISBA and the Advertising Association, seeking to establish guidelines as members look to them to help navigate the new terrain by understanding best practices and the legal implications of using Gen AI.

Ultimately it will be vital that media organizations are able to empower their brightest minds, but also mitigate the considerable risks involved in any new technology that disrupts and challenges traditional legal frameworks.





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Content Generation

There is a clear progression in terms of the likely impact of Gen AI, with the generation of text being the most advanced (ChatGPT is a high profile example), followed by audio and then video. In part this is due to the complexity of the tasks involved, but also the ability to generate content that can be accepted by consumers. Text created by Gen AI is arguably the hardest to discern from that originated by humans, whilst Gen AI video can be the easiest to spot. Gen AI is already being used to generate captions, Instagram posts and podcast text descriptions. It can generate metadata that is appended to content and advertising, and add translations, transcriptions and subtitles.

In some regards, this echoes the sequential impact of the internet on different types of media. The web was initially text-based due to dial-up limitations, but then the advent of MP3s and streaming saw the music industry impacted a long time ahead of the video industry. However, it was stressed that the time lag here is unlikely to be very protracted ("months, rather than years") with Gen AI already being used in children's television. For example, the animations for a whole series of Paw Patrol, which has been created by AI from plots and scripts through to animation. Advertising is already being created by AI.

Matt Deegan of Folder Media shared a specific application of AI already being used by some community radio stations in the UK. Here an AI application is used to scan news feeds for stories relevant to that community and collate them into scripted news breaks. These are then read by a voice that has been 'cloned' from broadcast talent.

"So if you're a nationwide radio station, you might have a national news bulletin normally, but by using some ad insertion tech, you might suddenly create 300 local bulletins or combine traffic and weather and that kind of stuff together to again do some sort of enhanced services. In America, we've seen radio presenters on networks put on lots of radio stations and obviously they can't get the main presenter to voice all of the local ads."

Matt Deegan, Folder Media



In this specific case, it can be debated whether AI is 'replacing' human activity, as smaller media owners might argue that they could not afford their own news teams and readers, so arguably the technology is enabling rather than substituting. This echoes a point discussed in our group that the greatest impact of Gen AI may be less on premium, high-quality content, and more as a tool to enhance User Generated Content like YouTube content and podcasts. Voice cloning can be used in editing to insert new words without getting voice talent back in the studio. Clearly the contracts of talent will need to address, authorize (or limit) the use of their voices and images for cloning. This was one of the issues that provoked the 2023 actors strike in the US.

There is also the debate about whether Gen AI *should* be used to generate content and how far that should go. Media owners are at heart creative organizations and there is existential angst about how far Gen AI and machine learning could and should get them. Will its role be limited to children's and family entertainment? Is that being condescending to children and families?

"I think it's an existential conversation. We are a creative organization in our bones. That's what we are. For people in production creativity is their life and soul. Even if we could, to what extent would we want to use it in this way?"

Margo Swadley, BBC Studios



Perhaps some of the skepticism about whether Gen AI could ever create – as opposed to augment - premium video content lies in the whole concept of how Gen AI works: it is trained by absorbing and learning from content that already exists, so it can reflect its input data, but can it take a truly 'creative step' to move beyond this?



Gen AI and advertising

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Gen AI and advertising

Creative

Ads created by Gen AI already exist. Meta's Gufeng Zhou highlighted a recent campaign for Coca-Cola with a storyboard and visuals created by AI. However, the key question when it comes to generating a core creative for a campaign is whether Gen AI can take a genuinely creative step. Some early indications from creative testing with consumers are that ads generated by AI tend to perform at around the average of all ads.

It makes sense that Gen AI trained on absorbing all ads is producing something that reflects an average, but do advertisers want to invest in a technology that, to use a statistical term, 'regresses to the mean'? Can it actually move beyond the average?

Creativity is essential and there is a danger that advertising may not only regress to the mean but also reflect and amplify current societal biases: surely advertisers will want more than that?

The point was also made that there is a difference between performance ads that are designed to promote activation and those that are aimed at brand building and values. It may be that Gen AI has a greater role to play in the former, particularly when it comes to personalization and activation.



Personalization and adaptation

Where Gen AI may have the most initial impact is in adapting advertising campaigns to make them more targeted and relevant for specific groups. Rather than taking the initial creative step, Gen AI can create adapted versions of a campaign to aid hyper-targeting. This concept already is used in radio advertising for example, where national campaigns can be adapted to reference local names or even the current weather in that region.

So, Gen AI may play a powerful role in executing content production based on an original creative, with AI working to create variants for imagery, taglines, formats, colors and other relevant factors. Those may well be analyzed and isolated by AI analysis of past campaigns and other inputs. As we discuss later, AI can also be helpful in analyzing the effectiveness of those various versions after the campaign has run.

Concern was expressed about the degree to which, if taken too far, such adaptation could actually undermine the identity of the brand itself. If Gen AI allows a brand to become effectively a chameleon, with the ability to be 'all things to all people', to be both transgressive to teenagers and traditional and reassuring to the elderly then is there any brand left as a result?

"If each person continually sees some different image of the brand based on their interest and needs, and if each person has one personal idea of my brand and if we continuously run this type of precision marketing activity that artificial intelligence is pushing us towards, the question is: in the long term, how does the brand have a unique proposition? How about the brand, the future of the brand? What about the brand equity?"

There is definitely a fear of a loss of control, that the strategy or communications objective will be lost if Gen AI becomes more than just an enabler.

"Our clients are saying we're trying to use Gen AI to drive personalization and align different messaging to different segments that drive a differential outcome. Well, how do you do that in a way that still maintains brand integrity? And I don't think a lot of people think through that issue. super well, right? We want to govern content production around the brand guidelines and use Generative AI in a way to manage personalization, but personalization with the sensitivity to the brand."

MacDonald, McKinsey

Ad testing and campaign evaluation

As with the role of Gen AI in program generation, vital existential issues are being discussed in the advertising industry when it comes to creating and adapting advertising. However, it's clear that Gen AI is already playing a role in the evaluation of advertising creative and the success of campaigns.

Isolating the impact of elements of content has arguably been harder to evaluate until now, compared to more quantitative metrics like placement and frequency. AI-driven object recognition techniques provide an opportunity to better quantify the impact of a campaign's creative elements.

"What was definitely undervalued so far is the creative itself, the content itself. It was very difficult to take creativity into account in ads effectiveness measurement. With the new AI capabilities, especially image & object recognition, it's becoming possible to predict ads response by decomposed creative elements in a scalable way."

Gufeng Zhou, Meta

As a result, Gen AI could greatly enhance media measurement and marketing mix modeling, providing analysis to assist the optimization of campaigns and media planning with better measurement. We may be able to cast greater light on the relative contributions of placement and creative as AI-powered creative testing can facilitate variation of imagery and video content that would have been cost-prohibitive in the past. Significant innovation is anticipated in the field of media and advertising measurement.

Gen AI also has the potential to democratize media buying, widening opportunities to new customers who are less familiar with how to buy media by allowing them to analyze creatives, give advice and predict campaign outcomes. As we saw earlier, some feel that Gen AI may have the most impact on smaller producers of content, allowing them to do things that they previously could not afford or have the relevant skills to do. In the same way, it may remove barriers to entry to buying advertising, opening the floodgates to allow new users to create their own audio or video campaigns in just a few clicks.



Is AI about regressing to the mean?

However, the potential limitations of AI do need to be borne in mind. Once again, it's the issue that Gen AI can only be as good as the data it has been trained on. For example, Dutch company Ster - responsible for advertising on NPO - has developed a tool called AdScan. Ster has accumulated a very large data set of respondent-based research on advertising creatives. This data has been used to train models that can give advice. The system is highly scalable, with answers available within minutes as opposed to putting a project into the field. The tool is proving useful, but one of its acknowledged limitations is that it can tend to lead to recommendations that could be seen as stereotypical or obvious.

"It gravitates towards the average of proven concepts, so it's giving advice everyone can think of, like 'put animals into your commercial, put children into your commercial, use cheerful colors.' We've been thinking about using that evaluation to maybe use Generative AI to update those creative flows commercials, but we'd risk seeing a lot of commercials starting to look the same. Because if commercials that did well in the past have a dog or a cat in it, the model will naturally reproduce those commercials as best it can and start putting dogs and cats in every commercial."

Rick Hoving, Ster

What would a Gen AI creative appraisal have made of some of the most popular past campaigns that have caught the imagination precisely by being different from the norm? Can AI be intuitive, or even counter-intuitive? Concern was raised that research that doesn't involve human appraisal may not reflect that there is not just one common idea of what good looks like. Success is not always rational.

"The idea that AI does a perfectly average job? Yeah, that really worries me. Something can be excellent because it breaks the mold - because it does something that's never been seen before. But then we write it off because the automated script gives it a five out of 10 when, if we had the time and resources to have people rank it, it might have got a nine out of 10 from the audience it was intended for."

Scott Thompson, Publicis

Is Gen AI sexist?

A key element of Gen AI is that it is trained on available data. As we have just discussed, this means that it is effectively trained on the existing biases and stereotypes in society. This isn't AI's fault, but it does mean that it is reflecting society back on itself: if you ask Gen AI for a picture of a doctor, you get a man. If you ask it for a nurse, you get a woman. There is an implicit danger that unless this is addressed, Gen AI may create one massive societal filter bubble that reinforces negative as well as positive traits in society.

"One of the things we were noticing is that AI can be heavily biased against women, unfortunately. We have been seeing that it actually advised customers to not use women in their commercials. Reason is, it picked up a correlation between women and the boring household product commercials they were often featured in and those just aren't very fun to watch. It's like one of these things we have to be very attentive to, just not to reproduce those biases we have in society because they get picked up very fast."

Rick Hoving, Ster

There was some debate about whether the use of Gen AI should be limited to the performance of tasks that can be more quantitatively defined, as a tool for a creative as opposed to being used to take that creative step itself. This assumes that AI is indeed the sum of what has come before as opposed to being capable of making true creative steps. However, this assumption was contested by some as being too generalized. It may well be that in the future AI will move beyond competence to become capable of excellence and innovation. It is in our nature to overestimate the short-term consequences of new technology and underestimate the long-term impact.





Intellectual Property

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Intellectual Property

A particularly important issue that arises from the growing use of Generative AI is the issue of copyright and intellectual property. This can apply on a number of levels. Performers may have concerns about the implications for their image rights, with the increasing ability to clone the voices and videos of talent. This may become a key element in contracts:

"iheart has done deals with its talent that will allow it to sample their voices and create versions. I had one example where the breakfast presenter does the daily weather bulletins with a sponsored credit across the rest of the station and about 50 other generated versions of them: connecting audiences with someone they like, the breakfast presenter taking some data off the shelf and putting it together."

Matt Deegan, Folder Media

The ability of Gen AI to both generate scripts and clone actors was a key issue in the 2023 US writers and actors strikes. Content creators meanwhile are concerned about their work being used to train Gen AI models that can then be used to compete directly against them.

One option for content creators is to block the use of their content for the education of Gen AI models, another is to enforce some kind of licensing model. The Guardian newspaper and the BBC for example have taken steps to block their content, while X (Twitter) claims that moving behind a paywall may be the only way to stop the army of AI crawlers slowing down the service.

The big question is how realistic attempts to block access to, or monetize, data as an input to Gen AI can be. The first issue is that so much is available on the open web that the data will not necessarily be seen as essential. There is some skepticism that media companies may be sitting on a treasure trove of unique and valuable data that is not available elsewhere.

"Do we have valuable data to train models? I think to be honest and to be a little bit provocative here, I don't think we do, because there's so much out there on YouTube, on Spotify, etcetera. There's so much audio content and so much video content. Large language models can be trained with publicly available data, and they don't need our proprietary data as of now."

Moritz Fries, ProSiebenSat.1 Media SE

Some content is very obviously labeled and IP enforceable, but so much gradually bleeds into and becomes indistinguishable from general popular culture, the zeitgeist, a sort of de facto collective ownership.

Meanwhile, there is the issue of being able to prove that your content has contributed directly or indirectly to a new creation. Copyright law places great emphasis on the idea of a 'creative step' that a piece of work can be sufficiently changed to be deemed a new creation, like the works of the artist Roy Lichtenstein which were 'inspired by' images from 1960s comic books.

In this sense, it could be argued that we may be unable to hold Gen AI programs to higher standards than we apply to ourselves:

"The stuff that we'd listen to, we talk about, we tweet about, or whatever, that then feeds into the next generation of models and the next wave of culture, and copyright law just isn't set up to handle that kind of stuff."

Scott Thompson, Publicis

"We'd be naive to think that humans don't copy what they've learned. We like to think that we are all incredibly creative beings who are constantly coming up with unique and new great ideas. I don't think that's largely the case in a lot of instances. I think a lot of the stuff that comes out of us is born from our own experiences and things that we ourselves have ingested. Don't necessarily think that as humans we are generating fantastically unique content because I just don't think that's always the case."

Graeme Griffiths, IPA



Content Authenticity

One initiative that may have more success is the idea that content generated by AI should be labeled as such, so that users are at least aware of how it was created. A number of major players like BBC and Microsoft are part of the Content Authenticity Initiative, arguing that content should be labeled in the metadata as AI-produced, along with what steps have been taken to generate the content. This initiative could prove useful - but would of course be limited to areas of activity that are regulated and 'above board', as opposed for example to political deep fake videos that are deliberately designed to mislead. For unregulated content, the irony is that it will most likely be AI programs that are trained to recognize AI-generated or altered content.





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Data and research

It's clear that AI has implications for the more sophisticated analysis of data sets, be they respondent-level surveys and panels or first-party data sets. This is arguably one of the areas in which the use of AI is already the most established, with for example forms of AI and machine learning already in use to detect anomalous credit card purchases or predict the likely performance of stock markets. The perceived strength of using AI to analyze data is its ability to cope with large data sets, offering both speed and scale. Data analysis can be an extremely laborious task, so AI assistance in identifying patterns and increasing the 'speed to insights' is seen as exciting. It's potentially a tool to better understand why things are happening.

"I hope that artificial intelligence and the future in this area will be able to create insights to have more deep learnings about the knowledge or the habits of the consumer. Human audiences will be complemented by algorithmic ones and AI can help communicate effectively in this sophisticated ecosystem"

Marco Robbiati, OMG



In some cases, this is about more than speed as AI can play a role in pattern recognition that would not be visible to the (human) naked eye. This is one of the reasons that those involved in healthcare data believe that AI could be a game-changer in preventative healthcare.

Our experts gave examples of areas where they had already used AI for data analysis. In some cases, this was described as 'dabbling' to see what is possible (with 'mixed results'), while others are using it more regularly. Areas cited include helping to write questionnaires, analyzing open-ended questions in survey research, analyzing audience data to model predicted ratings, lead generation to identify where new customers might be found and service tools used in customer relations.

"Internally, we've built our own large language model which we use in conjunction with our clients to essentially help do all the research that underpins a lot of the strategy that we do because like many of you, we produce an enormous amount of content and have to do a lot of research on behalf of our clients. So it's been extremely valuable from that perspective."

Craig MacDonald, McKinsey





What will be the likely impact of Gen AI?

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What will be the likely impact of Gen AI?

Our panel of experts is already very engaged and knowledgeable when it comes to the practical applications of Gen AI across the various parts of the media ecosystem. It's clear that there are a number of exciting potential applications. However, there is also a strong desire to understand the limitations of Gen AI, largely focused on concerns that Gen AI content may be competent and usable, but not necessarily exceeding the average, the sum of its parts. There is concern about excess variation and personification of messaging diluting brand identity. Some of our experts are skeptical about how practical it will be to protect or license content that is used to educate models. Enthusiasm is tempered by a strong desire that Gen AI should be a tool to facilitate excellence rather than replace creativity with risk-free competence.



"In this current exploration and experimentation phase the biggest use case for us is rather efficiency driven because it's something that can trim down complex processes, gets rid of redundant tasks and can let our colleagues focus more on high-quality work. That's the major use case we are currently seeing rather than content creation. However, in the medium term, there will for sure be steps in creative processes which can be enhanced, accelerated or even substituted by Generative AI."

Moritz Fries, ProSiebenSat.1 Media SE

At its best AI offers an opportunity to allow us to automate elements of the process that may be seen as labor intensive, freeing up time to concentrate on higher-impact tasks. Analogies that our experts used were moving from calculators to spreadsheets, or from acetates to PowerPoint slides. In that sense, AI could be an enabler. This may parallel developments in the field of Virtual Reality, where the initial focus on immersive virtual worlds has evolved into more of an emphasis on Augmented Reality, assisting rather than replacing.

For the media space specifically, our expert panel largely agreed that used appropriately, Gen AI can be a useful tool rather than a threat.

"I'm very much personally of the position that it's a business tool. And how do you use that tool to do a better job now? Throughout history, tools have replaced people you know and it's not any different for AI, but it's still how do you devise and develop something that enhances your skills rather than just replaces it with a very average version of yourself."

Matt Deegan, Folder Media

Whatever our views on Gen AI, it is clear that media executives in all areas of activity cannot put their heads in the sand and hope that AI goes away. At its best, it will augment and enhance what we do, but that will require gaining the skills to understand how AI can best be used. Without that understanding, your job truly could be at risk to those who do have those skills.

"A quote that I heard internally quite recently was that when we talk about replacing people with AI and replacing jobs it's more a case of jobs and activities not necessarily being replaced by AI, but you may be replaced by someone that uses AI. AI isn't necessarily going to replace a lot of stuff that we do, but you might be superseded by somebody who is just really good at using AI."

Graeme Griffiths, IPA





Thank you for reading

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Contact steve.cooke@gfk.com for further details

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