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2024 media and  
entertainment outlook

**Generative AI**

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### About Deloitte's Outlooks

Deloitte's annual sector and subsector outlooks highlight the leading trends we expect to shape businesses over the next 12 months. These complement our annual TMT Predictions, which dive deeper into specific trends and technologies enabling change, transformation, and disruption.

# Is media and entertainment ready to be disrupted yet again?

A Korean pop star releases multiple versions of a new song and video, seamlessly singing in a different language for each. An aging actor becomes young again for a blockbuster film, then rents their celebrity double to star in commercials. A popular influencer creates a virtual replica of herself that her fans can talk with for a small fee—or pay a premium price to speak with the real person. Non-player characters (NPCs) in a video game have conversations with players rather than repeating a narrow set of pre-recorded lines. Each of these futuristic scenarios has already happened with the capabilities of Generative Artificial Intelligence (Generative AI).

The early capabilities of public Generative AI models appear magical, sparking experimentation to discern where they can be applied to use cases and business models—and where they may not yet be mature enough. Press and pundits believe it to be a game changer—or the latest hype—with breathless speculation about what it will or won't do “in the future.” At the same time, there is uncertainty about how much the models can grow past current capabilities and when the economic value will be large enough to offset the capital intensity necessary to train, run, and grow them.

Media and entertainment (M&E) companies may see Generative AI both as a threat and as a potential way to amplify creativity, derive insights from complex data, and do more with less. User-generated

content creators are already publishing synthetic media to social media sites, experimenting with its capabilities and testing audience acceptance.<sup>1</sup> Yet, consumers have shown mixed emotions and confusion as they engage with the sudden arrival of synthetic media.<sup>2</sup> Within this maelstrom, the biggest public-facing Generative AI services may be reshaping M&E in unexpected ways.

This 2024 media and entertainment outlook explores the relative maturity of Generative AI tools and the capabilities and use cases they can enable for M&E companies and creators alike; the growing status of public-facing Generative AI services seeking more relationships with media; and the implications of Generative AI on content creation, recommendation systems, creativity, and trust. Generative AI appears to be broadly disruptive, though it remains early in its growth. It is likely to unfold quickly, but how and where remains unclear. What should companies be thinking about as Generative AI becomes a larger part of their planning? What capabilities are available now to everyone, and which ones are possible when combined with existing tools and leading-edge innovations? What factors could slow adoption and challenge executives?

# Transformation often requires maturation

While most industries focus on productivity gains with Generative AI,<sup>3</sup> leading media and entertainment companies are applying it directly to their products: scripts, ad copy, images, and explorations with generative audio and video.<sup>4</sup> Many are experimenting with proofs of concept to understand how it all works and where it can be applied effectively; some are moving quickly to operationalize and productize Generative AI (GenAI).<sup>5</sup>

To help enable some of the more compelling opportunities, like commercial-grade media and hyper-personalization of content, key challenges may need to be addressed first. Do companies have the talent, the data and data governance, and assurance against liabilities to enable strong outcomes and reduce risk? Can tool providers address some of the pain points and limitations in their models, application programming interfaces (APIs), and applications?

Many M&E companies adopting GenAI are experimenting with the leading public-facing models directly through their consumer-facing services, through their APIs, and with third-party software and services. Creative teams are using image models in pre-production for early ideation, mood boards, and concept development, like new characters, costumes, and sets.<sup>6</sup> These can be expanded into storyboards, helping accelerate early development, planning, and budgeting.<sup>7</sup> Producers and creators are using large language models (LLMs) for localization and dubbing of content into multiple languages.<sup>8</sup> Some are working with third parties to train models on specific datasets, like film archives that can be used to de-age actors, combining them with existing 3D modeling software to enable more production-ready results.<sup>9</sup> Wedded to dubbing and lip-synching tools, the biggest celebrities can become even bigger, with their acting careers potentially extending well beyond their physical lives.<sup>10</sup>

These examples show the ways that early Generative AI capabilities can augment and amplify preexisting workflows: virtual influencers and de-aging actors were already possible, but Generative AI is helping this work by modeling the details of their manners, tone of voice, and behavioral traits.<sup>11</sup> The year ahead could see an abundance of new solutions that help studios combine their toolsets—and their data—with Generative AI capabilities to enhance specific elements of their productions.

M&E companies are also likely encountering Generative AI features in the production tools they use.<sup>12</sup> A few may try to build their own private models, though this can require more costs and coordination across ecosystem partners.<sup>13</sup> Some media and entertainment companies may still be trying to catch up with the digital transformation of the past 20 years, underscoring another characteristic of the current moment: For some companies, there is already too much change.

Production teams may also be waiting for the tools to mature. Although text-based models have advanced quickly, there is a perception that models for images, audio, and video are not yet mature enough to generate commercial-grade media for traditional studios.<sup>14</sup> The quality of outputs may not be high enough, and it is often still difficult to direct and refine outputs throughout workflows. This has likely prevented these tools from moving further along the media production toolchain. Existing production toolsets offer precision and control from start to finish. Enabling this capability with Generative AI production tools could be critical in driving adoption.

The situation may be different for magazine and newspaper publishers. Text-based Generative AI models are the most mature. These are the LLMs powering conversational text interfaces for the biggest public-facing providers of conversational AI. Their capabilities are enabling publishers to augment the tasks of journalism, such as making transcription and summarization faster, but they are also having an impact on their business model.<sup>15</sup> Publishers have already faced challenges capturing audiences that may be more likely to consume their headlines in search and on social media.<sup>16</sup> With Generative AI moving into major search engines, more people could become accustomed to interacting with conversational AI for information summaries instead of clicking through to publishers. So, some publishers are exploring new business models.

# Generative AI could be your next customer

As more people embrace leading Generative AI services, especially as they become more central to smartphone usage, it could become even harder for companies to capture audiences on their own sites and services.

Just as social media has steadily captured more headline consumption,<sup>17</sup> conversational AI in search engines could dominate summaries. Early estimates anticipate a 25% decline in traffic to publishers due to conversational AI in leading search tools—and these estimates are already being revised upward.<sup>18</sup> Recognizing this, some publishers are signing deals to share their content with Generative AI providers, working to confirm that the answers being offered by public models will include their own content—and generate additional revenues.<sup>19</sup> They can become part of the supply chain for GenAI, informing the summaries of information those services deliver to users. Notably, the value of these deals is relatively small, suggesting that many publishers may not yet understand the value of their content to training sets—or perhaps training sets are commoditizing such content and driving its value down.<sup>20</sup> However, some are exploring revenue-sharing deals between content owners and Generative AI providers.<sup>21</sup>

Similar realizations seem to be happening beyond text and publishing. Leading providers of stock images understand that it may not be long before diffusion models—image generators—can create any photorealistic image on demand. Having built their business by

stockpiling licensed images, some are now licensing those stockpiles to be used in training sets for Generative AI models.<sup>22</sup> As content generation tools mature, they could consume more audio, video, and even 3D libraries. Major Hollywood studios have been in licensing talks with Generative AI services, perhaps anticipating a near-future of on-demand video and more advanced Generative AI content creation tools.<sup>23</sup>

The next 12 months will likely see another shifting strategy for M&E companies: If you can't beat them, join them. Some major studios are reluctant to give up the value of their content to tech leaders, while others are beginning to license some parts of their content libraries. What could this mean for contracts, rights, remunerations, and licensing? Can licensing content to third-party training sets be challenged by the writers and actors that made the content? And how might this vary globally?

These challenges are likely to grow. In the year ahead, this could converge with increased regulatory oversight aiming to ensure that Generative AI models are trained only on licensed content, which could further incentivize deals between platforms and producers. Media and entertainment executives may find themselves asking a new question: Are we a content business selling product to consumers, or a data business selling content to Generative AI? Or a bit of both?



# Disrupting content with more content

Traditional studios may be necessarily cautious, but content creators on social media could move more quickly. One likely outcome could be even more user-generated content on social video platforms. Creators are perhaps uniquely qualified to drive the evolution of Generative AI content. Many must post frequently to maintain engagement with their followers, reinforce their value with platform algorithms, and keep up with the pace of social content.<sup>24</sup> User-generated visual content is not bound by the expectations of high quality that drive major media studios. Creators are free to innovate and are often rewarded for experimenting with new forms of creativity.

Due to these features and the rate of maturation of the tools, Generative AI is expected to empower lower-quality content before it lifts higher-quality productions. This could enhance the attention-content-advertising flywheel of those services. Hollywood tastemakers may be challenged to see anything good in user-generated video, but the largest user-generated video service is also the largest video streamer on living room TVs.<sup>25</sup> Notably, “quality” itself is likely being redefined and may not mean big budgets and famous actors.

To facilitate more growth, major social media platforms are adding Generative AI capabilities to their creator toolchains.<sup>26</sup> Creators can use natural language to request new images and change the style of existing images, and even create new backgrounds and change elements within an image. This can make it easier for top creators to quickly deliver new content to their audiences, but it can also amplify previously less capable creators to do more. By modeling creator content and their audiences, social media services are also enabling better matching between creators and potential advertisers—critical for ensuring that a creator’s unique value—and values—are supported by their advertising partners.<sup>27</sup>

Generative AI can also make content more universal for independent creators and major studios. Translation and dubbing have emerged as strong Generative AI use cases, using models to localize content into many different languages, enabling it to reach much larger global audiences.<sup>28</sup> These tools can generate lip synching for video actors, matching their lips and facial expressions so they appear to speak

in a different language.<sup>29</sup> Some social media influencers are dabbling with virtual copies of themselves that look, behave, and talk like them.<sup>30</sup> Social media services are introducing their own synthetic personalities as well.<sup>31</sup> Generative music is also within the reach of small creators and big producers alike, further underscoring how much these tools are moving into creative work.<sup>32</sup> This can make it much cheaper and easier for creators to add music to their content, but it could also become a modern form of elevator music—a commodity version of background music for digital and physical applications.<sup>33</sup>

This potential for Generative AI to amplify commodity content could put a premium on verifiably human creativity—or possibly make it difficult to tell the difference. On the surface, it looks as if user-generated video is a commodity: the inexpensive (or free) low-quality entertainment product of the masses. However, user-generated video, amplified by Generative AI, could compete for entertainment time, redefine what “quality” means for video, and change the definition of TV itself. This could further advantage social media platforms: More content can enable more targeting, more engagement, and more advertising opportunities.

Like other content, ads and campaigns can be accelerated with Generative AI, delivered to markets more quickly, and more easily adapted to local languages, trends, and customs. Can streaming media services compete with this level of modeling and targeting, without the kinds of interaction data that social media has captured? Could GenAI enable streamers to bring more people onto their platforms and keep them there longer?

# Personalized recommendations with better models of you

With so much content, it could become even harder—and more valuable—to find the right thing at the right time for the right person. This could place a greater premium on the value of modeling and matching algorithms and support the next generation of recommendation systems.

Social media has used social graphs and recommendations engines to great effect matching content and ads with users—and driving strong engagement and ad revenues.<sup>34</sup> Streaming video providers are evolving their own recommendation systems to better engage their subscribers and help drive value to advertisers.<sup>35</sup> GenAI could help these systems to be more personalized and relevant to individual viewers, even predicting what a specific viewer might want to watch at a specific time. But this could require much better data. Social media algorithms have been designed to capture user interactions and turn them into content recommendations. Arguably, data capture, modeling, and targeting on streaming video services is much less mature.

Deloitte's 2024 Digital Media Trends study found that about 56% of Gen Z and millennials get better recommendations for TV shows and movies to watch from social media than from streaming video services—another example of audiences being captured by a competitor that may know them better.<sup>36</sup> Discovery and recommendations on streaming video services could be further sidelined as more people become accustomed to seeking recommendations from leading conversational AI services. This potential could be amplified if people adopt a new generation of on-device AI designed to know them better.<sup>37</sup> What other common interactions could be captured by conversational AI? Streaming video executives should consider this possibility.

Generative AI could enable even more responsive and adaptive content. If visual models become commercial grade—able to generate photorealistic outputs with precision—they could be used to modify content in real time to target individuals more closely.

For example, a single ad could be created and then sent to many viewers who would each see a variation of that ad tuned to get their attention better. Marketing groups are using LLMs to A/B test ad copy on different user personas that are generated by a model—digital twins of audience types.<sup>38</sup> This can help them to quickly test different campaigns and get closer to more personalized messaging. Could generative personas unlock better understanding of audiences, for example, enabling video streamers to generate stronger data for their recommendations?

Generative AI could also help game companies make gaming more personalized and supportive. Deloitte's [2024 Gaming Outlook](#) explored how launching and running top-tier video games has become very expensive, and players are aggregating into a smaller number of very successful titles.<sup>39</sup> Game studios are looking to Generative AI to help bring down costs and unlock innovation. They're using it for game development,<sup>40</sup> but it could also improve gaming experiences. By modeling how a new player is interacting with a game, Generative AI might enable more responsive and adaptive games that are better at helping players of differing skills onboard more effectively with personalized tutorials and personalized challenges. Deloitte's [2024 Digital Media Trends](#) found that one in five gamers began playing within the past four years.<sup>41</sup> Have they had good experiences? Are they gaming more and playing the biggest games and live services? Generative AI could also help deliver more positive environments in live service games by more effectively matching players and actively moderating harassment and bullying.<sup>42</sup>

Such capabilities will likely require more data about users and more acceptance of data modeling. This could challenge the trust that users have in providers, put a premium on security and privacy, and reinforce the need for more local on-device models. If providers can deliver on trust and security, Generative AI could unleash greater personalization across services and information sources. If users see the value of personalization, they may be more willing to accept being modeled by trusted services.

# Trust, authenticity, and human creativity

Since public Generative AI services have become widely available, certain terms have been frequently showing up in many scientific publications.<sup>43</sup> Scientists are using public LLMs, and the models are leading them to reproduce consistencies in their papers. For studios and content creators alike, there is a risk of being too dependent on the models and too defined by their outputs. Content can be too obvious or derivative. Relying too heavily on generative models for content creation can risk giving consumers what they already know they want rather than innovating to surprise and delight them.

On the other hand, as generative content creation advances, it can run the risk of moving too quickly beyond what is relatable for consumers. Authenticity—a currency that has underwritten the appeal of the Creator Economy—can be lost if the relatable “humanness” of creators is sacrificed to synthetic media.<sup>44</sup> Synthetic personalities, for example, could become uncanny—familiar enough to provoke but unreal enough to be disconcerting. Stories, dialog, imagery, music, and video generated by the next generations of transformer models could become so alien that it feels incomprehensible or even threatening. Even before LLMs gained popularity, an AI found strategies in a game that humanity was previously unable to discover, having played and studied the game for thousands of years.<sup>45</sup>

This reinforces a few things: Continually refining public models and training more bespoke models so they don't become obviously derivative or too alien should be considered; humans should be kept in the decision-making loop whenever Generative AI is involved; and focusing on augmentation and amplification of human creativity and innovation should be prioritized over automation and replacement.

This tugs at the nebulous realm of trust in the models and providers, and in content and content provenance—is it real, and where did it originate? Consumers are navigating synthetic media and the risks of misinformation, and M&E companies are worried that generative

content could come from training sets that have infringed on copyright, exposing them to greater liability.<sup>46</sup> Leading providers and ecosystem partners are pursuing this through consortia and technical standards, such as the Coalition for Content Provenance and Authenticity, which aims to build traceability into media content.<sup>47</sup>

Enterprises are also looking for greater trust in models and providers. Deloitte's State of Generative AI study shows that executives are challenged by trust in the quality and reliability of Generative AI outputs, and by the trust that their workers may or may not have that the technology will make their jobs easier without replacing them.<sup>48</sup> Trust could become a bigger issue as more generative content is produced and as more organizations transition to broader implementation and deployment of Generative AI.

Perhaps a deeper, existential challenge of Generative AI is its seeming ability to encroach on qualities once thought to be solely human. Not only has it shown the ability to create art and poetry and stories, but GenAI can also be used to simulate humans with synthetic personalities. With Generative AI, we could soon see social media populated by more synthetic influencers and synthetic media indistinguishable from the “real” world; movie and TV celebrities becoming even larger than life through their own digital twins; and non-human characters in video games holding deep conversations and exhibiting unexpectedly human behaviors.

This could change how we interact with digital systems, enable seemingly “intimate” relationships with synthetic agents designed to learn about us, and unleash huge implications beyond media and entertainment.<sup>49</sup> Is the coming future going to place humans at the center and charge a premium for verifiably human creations, or is this a new era that sees humanity sharing the stage with another kind of creative intelligence?



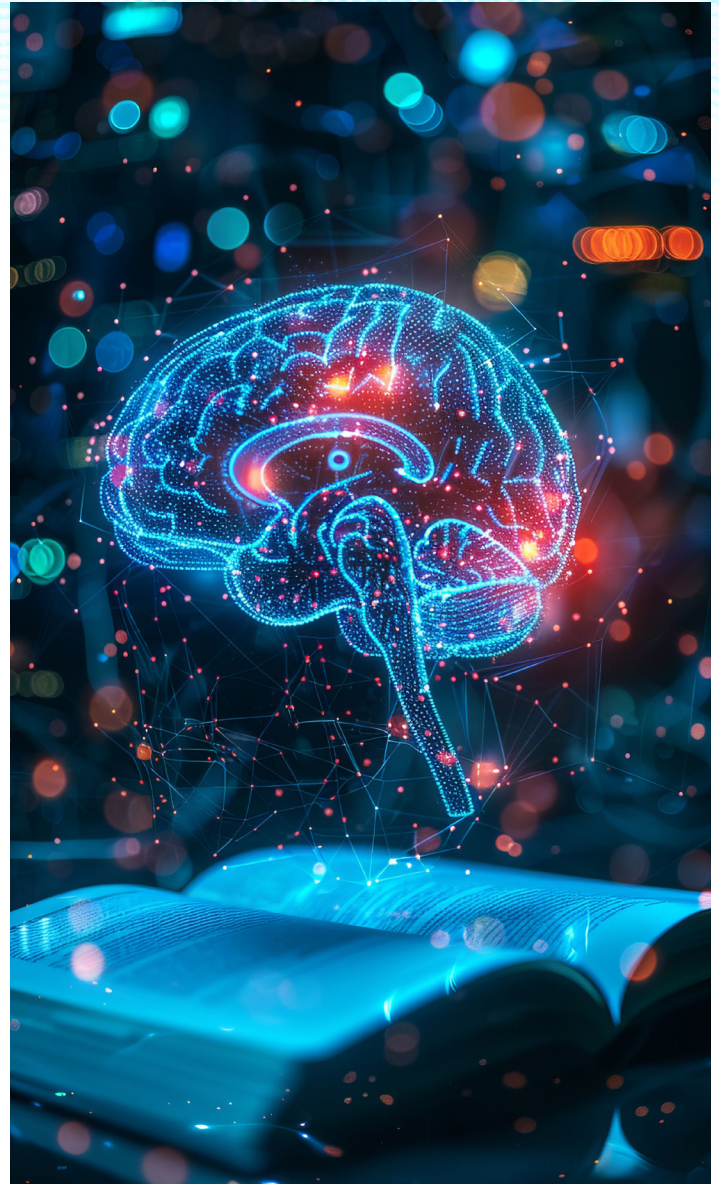
# Navigating the shifting sands

Despite the exuberance and magic, it is still early for Generative AI, but it seems to have real potential to reorganize media and entertainment once again into something different. As the saying goes, a rising tide lifts all boats. And the creative capabilities of Generative AI seem to be broad enough that they can support TV and film studios, video streamers, game companies, and social content creators alike.

Generative AI could reshape every business in the coming years, and even change the primary ways to interact with digital systems. But how quickly is change expected, and how deeply can the impacts be felt? There seems to be a growing sense of great urgency and uncertainty.

To help navigate this new wave of change, consider the following:

- **Are you pursuing the right objectives?** Do you really need Generative AI or will machine learning suffice? Should you be trying to compete with the biggest public models or building your own private models, or should you be licensing data and content libraries to influence the biggest training sets? Do you need your own hardware? Executives pursuing Generative AI should identify partners and providers for their goals, based on costs, capabilities, and reliability over the life cycle of their strategies. They may need orchestrators to help build relationships and connect the dots between components.
- **Talent could be at a premium.** Larger companies—especially top-tier brands—may be better able to attract and afford the best talent. Smaller companies may have a harder time—and may need to rely on software as a service for Generative AI capabilities or to build partnerships. Executives may not be very well versed in the nuances of operationalizing Generative AI and could require their own education.
- **Regulators have yet to weigh in.** Many regulators are working to understand and potentially contain the implications of GenAI. They will likely address copyrights in training sets, consider rules for labeling generative content, and look for anti-competitive behaviors from the biggest service providers and chip designers. Executives should consider if their approach to Generative AI could expose them to regulatory risks.



# Contacts

## Jana Arbanas

Vice Chair  
US Telecom, Media & Entertainment  
Sector Leader  
Deloitte LLP  
+1 415 987 0436  
[jarbanas@deloitte.com](mailto:jarbanas@deloitte.com)

## Baris Sarer

Principal  
Deloitte Consulting LLP  
+1 212 313 2697  
[bsarer@deloitte.com](mailto:bsarer@deloitte.com)

## Jeff Loucks

Executive Director, TMT Center  
Deloitte Services LP  
+1 614 477 0407  
[jloucks@deloitte.com](mailto:jloucks@deloitte.com)

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## About the TMT Center

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