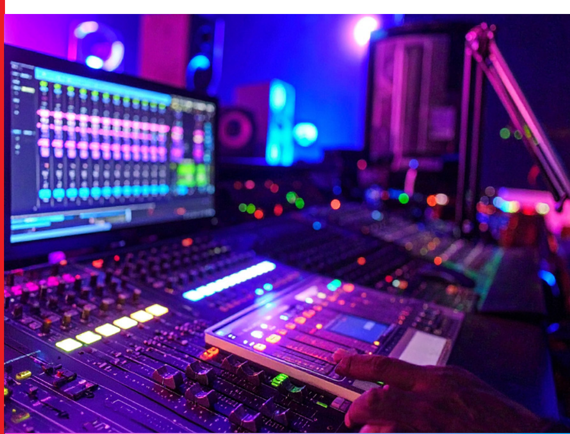
Adobe

State of Customer Experience in Media & Entertainment in an AI-Driven World

A strategic guide to creating personalized and immersive digital experiences



Foreword

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A shift is underway in Media & Entertainment (M&E), one that redefines how content is discovered, how platforms engage, and how value is created. In an attention economy shaped by scrolls, swipes, and streams, customer expectations have surged. Speed, personalization, and seamless discovery now outweigh traditional measures of scale or digital maturity.

This report presents ten strategic insights into how M&E leaders are evolving their operating models, marketing engines, and content ecosystems to meet those expectations. From GenAI adoption to mobile-first personalization to agentic AI experimentation, this moment demands more than innovation; it demands reinvention.

Success now hinges on precision: surfacing the right experience at the right time, orchestrating cross-device journeys in real-time, and scaling content creation without sacrificing quality or trust. And while disruption is nothing new in M&E, the urgency today is different. Discovery is being reshaped by AI. Personalization is the new loyalty engine. And the ability to activate data, automate content, and evolve the operating model will define the next generation of leaders.

If you're rethinking how your organization engages, builds, and scales, this research offers both a benchmark and a blueprint.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the Media & Entertainment Industry.

This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.

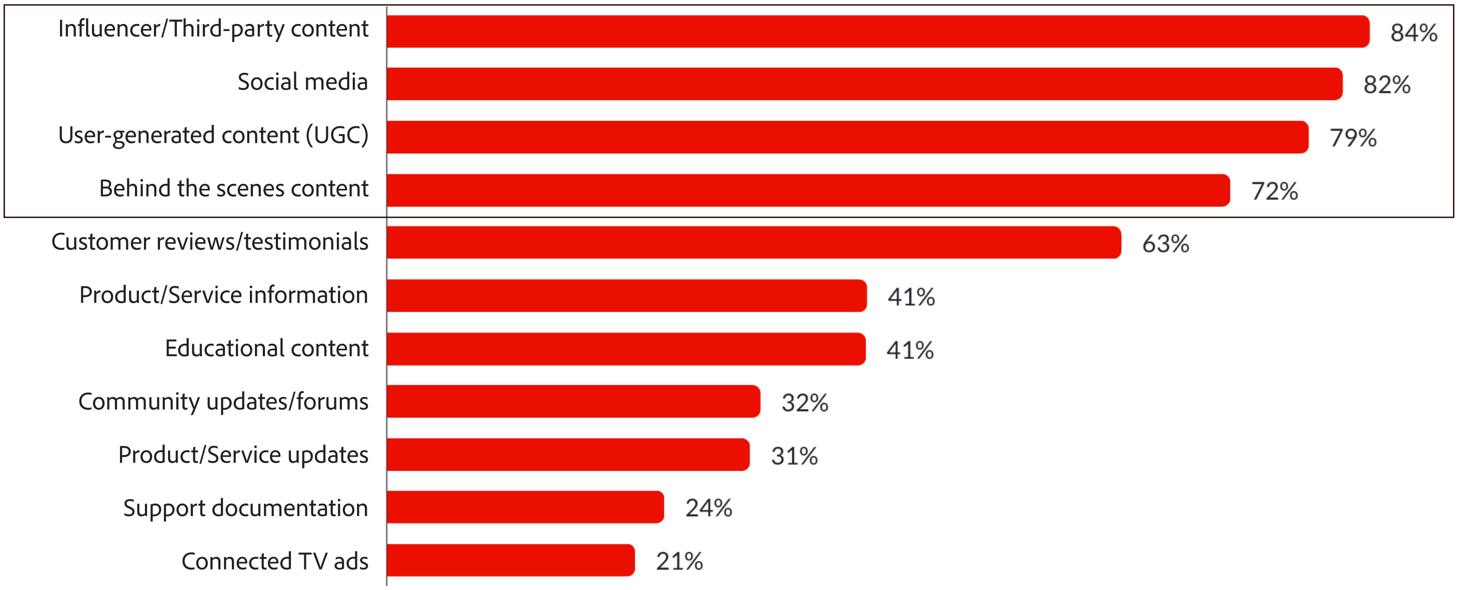
- 565 M&E leaders participated in the study
- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)
- 64% of respondents were from companies with over $1 billion in annual revenue
- 59% respondents were VP level or above

Insight 01

Personalization, mobile, and content define next-generation CX

On an average
6 interactions
occur before a customer makes an M&E purchase

While
93%
said their customers expect mobile-first experiences



Note: This chart shows the % executives that agreed or strongly agreed with the statement

Mobile-first behaviors are redefining the content journey

M&E brands face unprecedented pressure to earn every second of consumer attention. As audiences spread their interactions across multiple devices and platforms, the path to purchase has grown more fragmented and more critical to get right. A single brand experience now spans six or more meaningful touchpoints, from a creator's post to a branded short to a personalized push. In this ecosystem, mobile is no longer a channel. It is the default behavior shaping every scroll, swipe, or click.

Personalization is the industry's new operating standard

Personalization is fast becoming the industry's primary currency. Whether it's a direct-to-consumer (DTC) streaming platform, a sports streaming service, or a global media network, the expectation is clear: serve the right content to the right user at the right moment. But delivering that level of relevance at scale requires more than segmentation. It demands data fluency, real-time orchestration, and content agility. As influencer-led discovery and behind-the-scenes content surge, these formats must become core, not peripheral, to the engagement strategy.

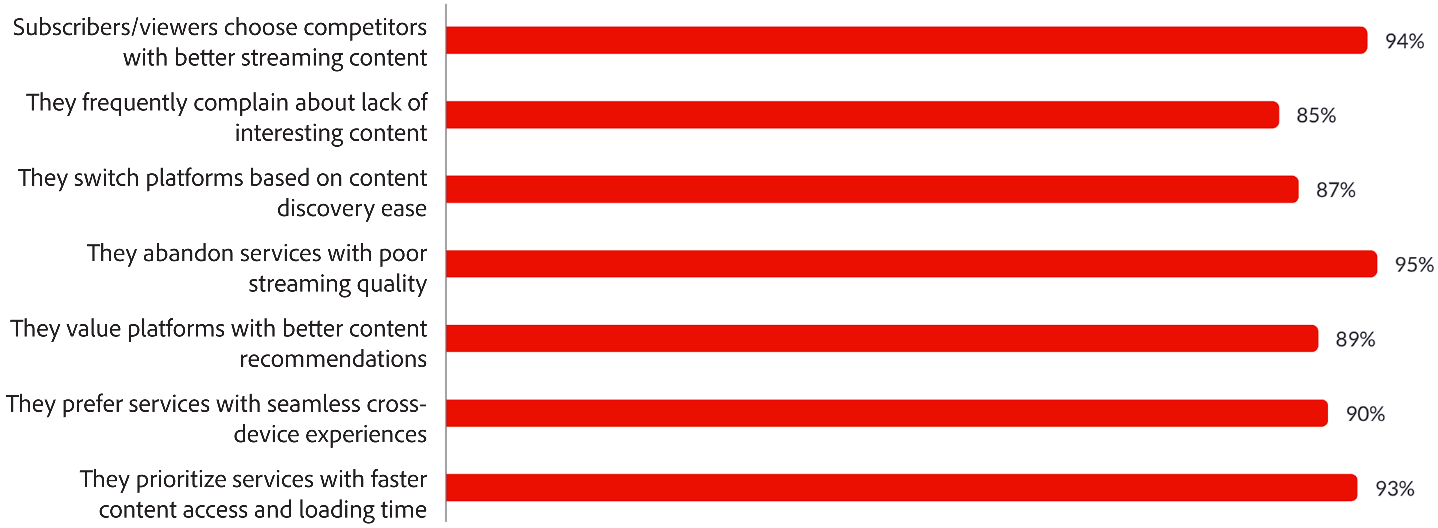
Leading brands are reengineering CX for speed and resonance

Winning brands will design their CX playbook around personalization, speed, and shareability. This includes building content architectures that can scale modular storytelling, investing in mobile-first design systems, and enabling AI-powered recommendations with transparency. Crucially, leaders must earn data trust by offering tangible value like content recommendations that feel curated, not creepy. From streaming giants to telco-media hybrids, next-generation CX is no longer about broad reach; it's about precise resonance, measurable performance, and sustained attention across every screen.

Insight 02

Content is king, content discovery the kingmaker

94% of executives say viewers switch to competitors with better streaming content



Note: This chart shows the percentage of executives who agreed or strongly agreed with each statement

Content alone is not enough to drive loyalty

In today's saturated media landscape, content alone is no longer enough to command loyalty. Discovery, the ability to surface the right experience at the right time is what keeps audiences engaged and on-platform. For M&E firms, this is where the battle is won or lost. With viewer attention fragmented across platforms and formats, poor content discovery translates directly into churn. Audiences have little tolerance for friction. Whether it's lag in streaming quality or irrelevant recommendations, one poor experience is all it takes to push them to a competitor with faster access or smarter curation.

Discovery must become a central, strategic capability

Streaming success hinges not just on the strength of the library, but on how intuitively content is found. Audiences now expect hyper-personalized, cross-device continuity. Yet many platforms still treat discovery as a backend function instead of a primary experience layer. The result is often overwhelming or impersonal. The data confirms it: users switch platforms for better recommendations, faster access, and easier navigation. In M&E, even premium content underperforms if discovery is clunky or disconnected.

Elevate discovery to a front-end product experience

Discovery must be treated as a product, not just a feature. M&E leaders should invest in intelligent recommendation engines, AI-driven personalization, metadata enrichment, and identity stitching to enable seamless cross-device continuity. Recommendations must go beyond "more of the same"—they must be anticipatory, contextual, and real-time. Every lag in load time, missed cue in personalization, or broken handoff across devices becomes a point of failure. Winning platforms will be those that not only house great content—but make discovering it feel effortless and delightful.

Insight 03

Marketing is increasingly measured by subscriber growth

96%

M&E marketers say they are expected to directly contribute to sales and revenue

While

98%

are under pressure to become more efficient

Note: This chart shows the % that said they agreed with this statement

Subscriber models are redefining marketing performance

Subscriber-led business models have transformed how Media and Entertainment companies evaluate marketing. As ad revenues fluctuate and licensing windows tighten, pressure to grow direct subscription revenue has intensified. While content drives initial interest, it's marketing that drives conversion—and leadership is taking notice. Marketers are no longer judged by buzz alone. They are measured by subscriber impact, retention lift, and lifetime value. With Customer acquisition cost (CAC) and Return on investment (ROI) under scrutiny, marketing is now expected to own the entire subscriber journey.

Marketers must manage fragmented, nonlinear journeys

This shift is fundamentally redefining how media marketers operate. Streaming platforms now expect marketing teams to manage the full subscription funnel, from teaser to trial to churn prevention. Yet many still rely on disconnected tools, outdated attribution, and siloed orgs. Meanwhile, subscriber behavior moves fast and unpredictably. A viewer might jump from TikTok to Reddit to a CTV app in minutes. Without integrated systems and shared performance goals, marketing teams struggle to connect creative execution to measurable results.

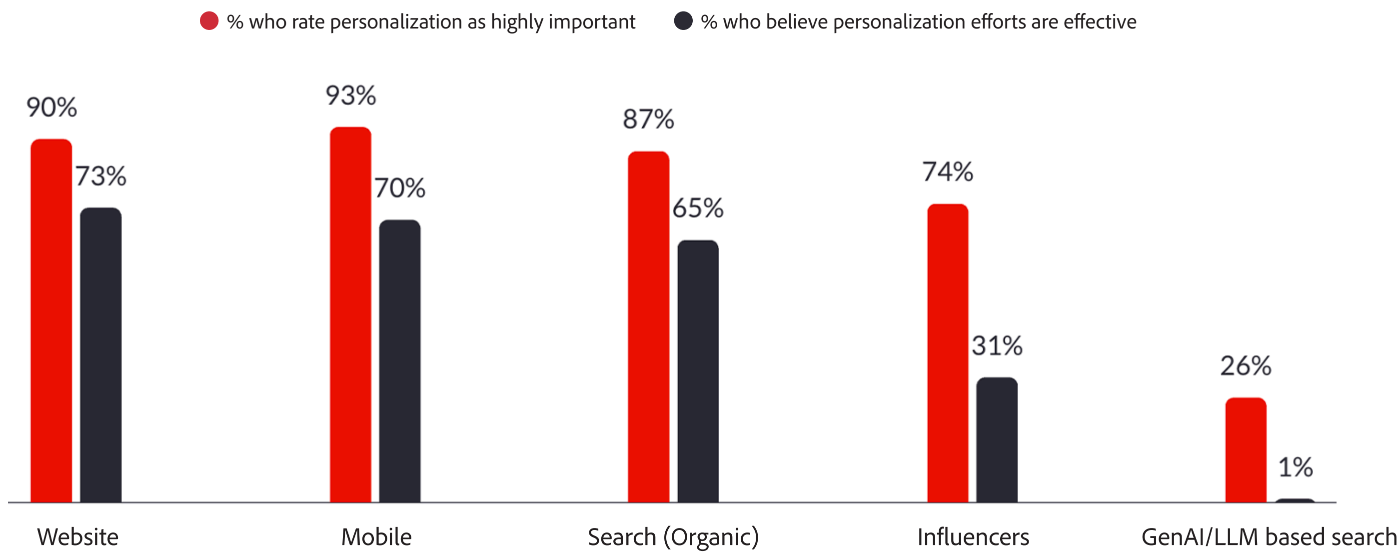
Elevate marketing to a full-funnel growth engine

Media firms must empower marketing to deliver subscriber outcomes with the same rigor as content. This means shifting from campaign-led thinking to journey-driven design, where every touchpoint is measurable and tied to revenue impact. Marketing's role must evolve from spend manager to commercial strategist. Leading M&E brands are consolidating martech stacks, embedding analytics into creative teams, and enabling real-time orchestration across channels. In a recurring revenue model, marketing's value will be defined by how many subscribers it brings in—and how long they stay.

Insight 04

Personalization gap represents untapped revenue opportunity

Only **50%** of the M&E customer journey is currently personalized end-to-end



This chart shows the % of the channels based on the level of importance and their effectiveness are globally

The cost of weak personalization is growing

Personalization is no longer a premium, it's the price of entry in the streaming-first era. Audiences expect hyper-relevant, timely, and curated experiences across every digital touchpoint. But the M&E industry continues to struggle with delivering consistent personalization across the customer journey. From mobile to search to social surfaces, there's a sizable drop between perceived channel importance and actual personalization effectiveness. Even as firms improve personalization compared to global peers, the gap between expectation and delivery is eroding loyalty and leaving monetization on the table.

Personalization is missing where it matters most

"Streaming fatigue and content overload have made relevance essential to retention. But most personalization efforts focus too late in the journey, like "Watch Next" modules. Earlier phases, such as mobile push, AI-driven search, and influencer touchpoints present an opportunity for deeper personalization. While GenAI-based search is rising in importance, M&E firms report just 1% effectiveness in that channel. These blind spots lead to fragmented experiences, missed conversions, and reduced subscriber lifetime value. Every unpersonalized moment is a lost monetization opportunity."

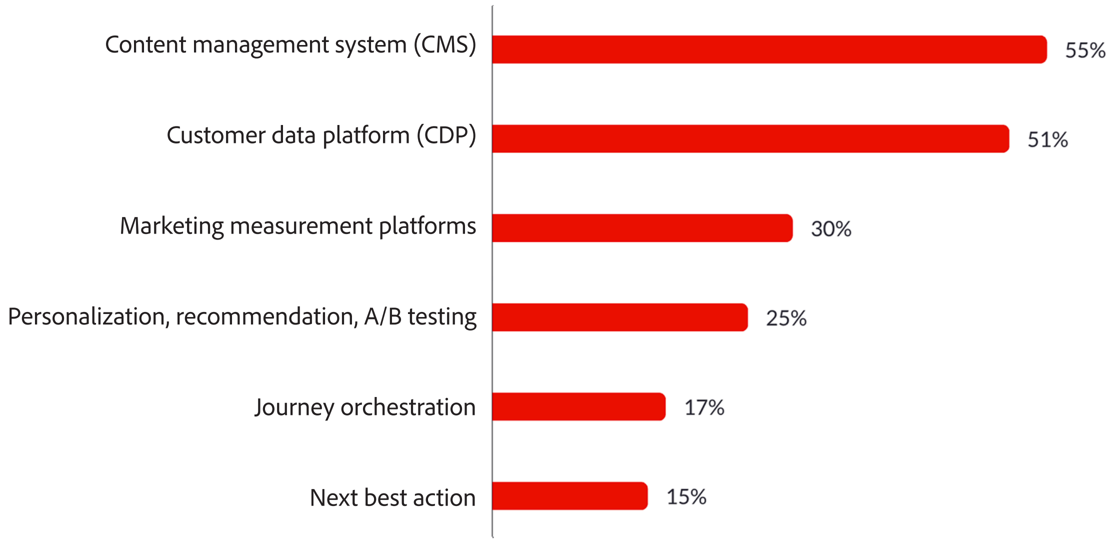
Treat personalization as an end-to-end discipline

To close the gap, media brands must enable real-time personalization across the entire content journey. This requires connected orchestration platforms, modular content systems, and live data activation across all surfaces: apps, mobile, search, and AI interfaces. The goal is not just to improve targeting, but to deliver a consistent, relevant experience from the first click to retention campaigns. Personalization at scale is no longer a technical challenge—it's a growth mandate. The firms that solve it first will lead in audience loyalty and monetization.

Insight 05

Customer data is fragmented and current toolsets won't scale

95% of customer data remains partially integrated or siloed, and most current systems aren't equipped to meet personalization and orchestration needs



This chart outlines the % of companies that believe that their martech stack will meet needs over the next 24 months

Fragmented systems are undermining personalization at scale

M&E firms have made significant investments in data infrastructure, yet most are still operating in fragmented environments. As content consumption spans smart TVs, mobile apps, social platforms, and emerging artificial intelligence (AI)-powered interfaces, disconnected data systems are limiting firms' ability to deliver real-time, personalized experiences. Despite access to rich first-party data, most current toolsets especially those supporting personalization, identity, and orchestration are not expected to meet enterprise needs by 2027.

Data disconnection not scarcity is the real barrier

The core issue isn't lack of data, but the inability to connect it across channels and sessions. Users still experience repetitive recommendations, irrelevant messages, or slow playback because their behavior isn't tracked consistently across devices. This lack of integration also slows campaign execution. Without unified profiles, identity resolution, and real-time orchestration, marketing teams can't act on intent signals at key moments. As audiences fragment across formats and regions, legacy systems are too rigid to respond.

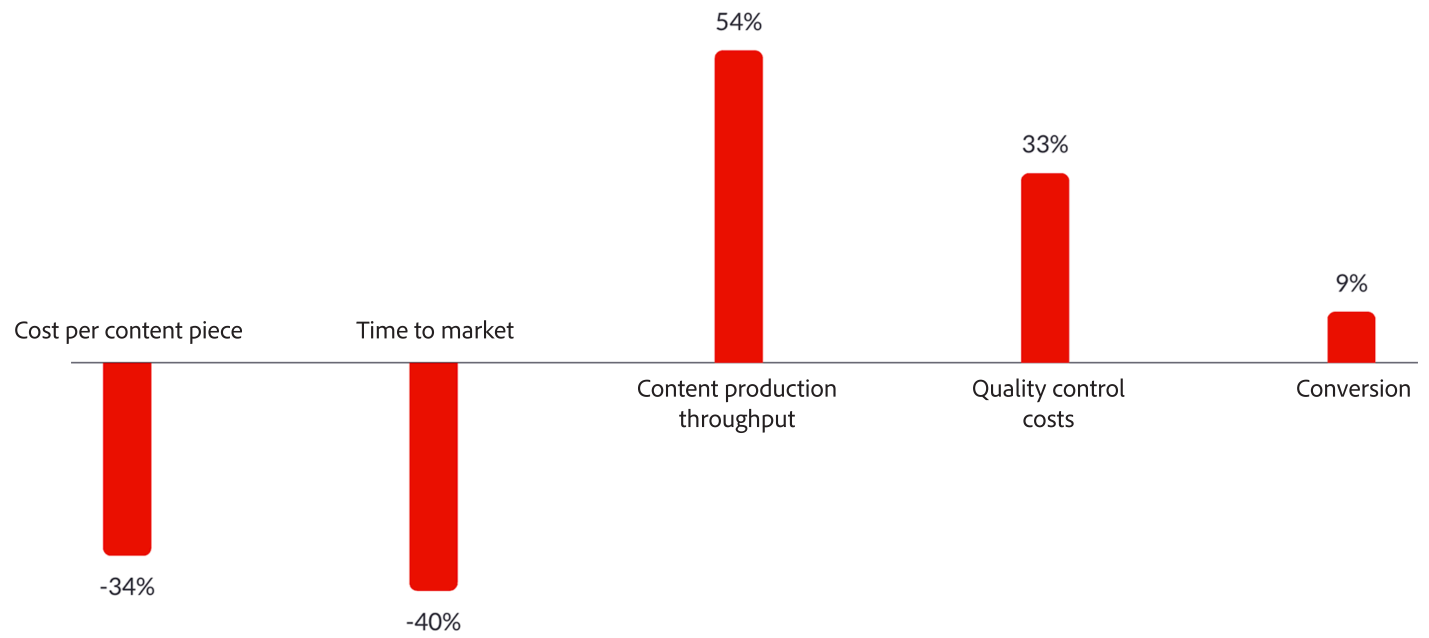
Build for agility with integrated data intelligence

To scale personalization and meet audience expectations, M&E firms must modernize beyond standalone CDPs and CMSs. The future lies in composable, real-time ecosystems that unify identity, orchestrate personalized journeys, and adapt across all touchpoints. This means investing in AI-driven data pipelines, modular engines, and interoperable tools built for flexibility. Delaying this shift risks more than inefficiency it limits revenue and relevance in a landscape where attention is harder to win and easier to lose.

Insight 06

Gen AI is transforming content economics

34% reduction in content costs	and **1.8x** jump in content production output	yet only, **16%** are currently scaling GenAI for content operations



Note: This chart reflects how Generative AI has influenced content production efficiency and costs.

Gen AI is already reshaping content operations

M&E companies are no longer speculating about Gen AI's potential, they are seeing measurable impact. Gen AI is redefining content economics by reducing production costs, accelerating timelines, and boosting throughput without additional headcount. For a sector driven by speed and variety, this shift is transformational. Content teams can now deliver 50% more output at a third of the cost, freeing up creative bandwidth for high-value formats, multi-region campaigns, and faster cultural responsiveness.

Content scale is no longer constrained by resources

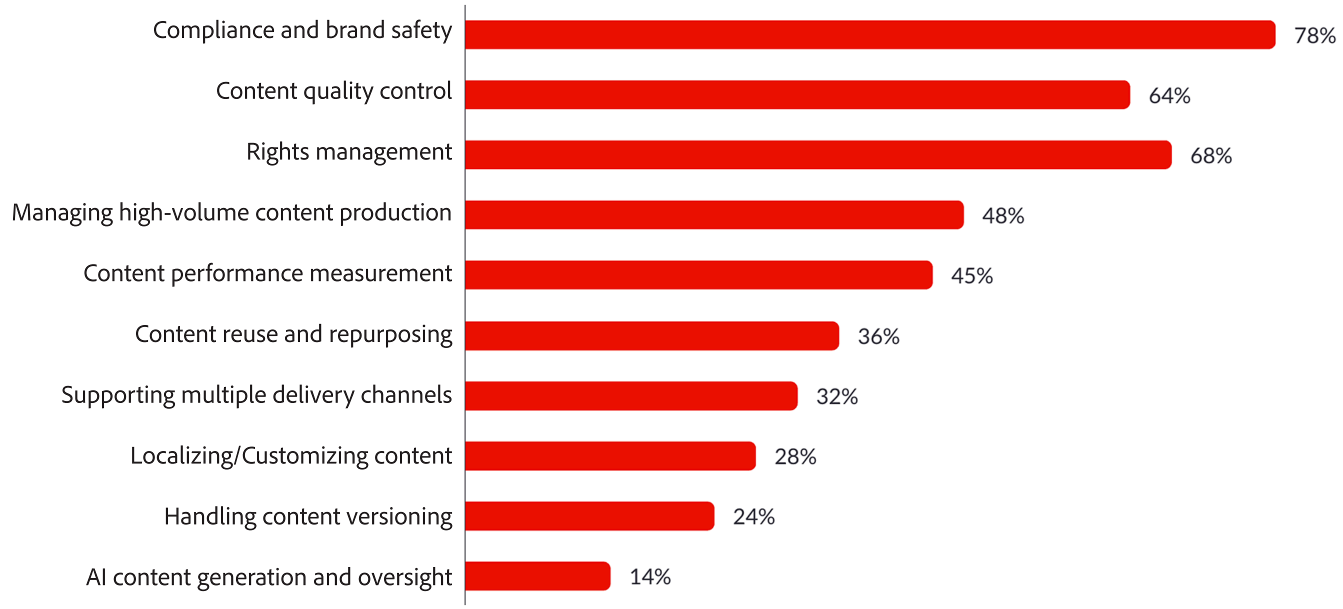
In M&E, content is the product and Gen AI multiplies its impact across the value chain. Lower production costs open doors for new formats and experimental IP. Faster cycles let teams engage with trends as they unfold. Greater throughput enables hyper-personalization across platforms, without bottlenecks. From script drafting and localization to promo asset creation, Gen AI enhances creative potential rather than replacing it. This is not just about efficiency it's a direct advantage in audience reach and monetization.

Build the infrastructure to scale with Gen AI

The $47 billion in value unlocked by Gen AI across industries is a wake-up call and M&E stands to gain the most. The question is no longer whether to adopt Gen AI, but how fast to operationalize it. Success requires embedding AI into the content supply chain, not siloing it in innovation labs. That means automating repetitive tasks, standardizing creative workflows, and integrating orchestration systems that turn volume into impact. Leaders will be those who scale Gen AI with precision and speed.

Content ops complexity rises with growth and AI

Only **14%** of M&E firms feel prepared for AI content generation and oversight.



Note: This chart shows the % of M&E execs/brands said they are prepared to manage content operations

Content operations must evolve to meet GenAI speed

As media and entertainment firms race to unlock the economic promise of GenAI, a new reality is setting in: operations are not built to scale at the speed of creation. From versioning and compliance to multichannel delivery and localization, the systems that support content have become the bottleneck. Most teams are still optimized for linear production pipelines, not for parallelized, AI-augmented workflows that generate dozens of variations instantly. That's why only 1 in 3 firms feel equipped to reuse or repurpose content across platforms, despite the fact that demand for volume is surging.

Scaling GenAI requires modern content governance

GenAI is accelerating content creation but human systems must scale alongside it. The lowest area of readiness is AI content oversight at just 14%, this underscores a growing gap. Without orchestrated workflows and integrated governance, teams risk inconsistencies or delays. This is particularly urgent for studios and streamers managing global franchises, licensing agreements, or multiple languages. Operational rigor must evolve from post-production to real-time, cross-channel oversight; especially as content teams scale across geographies and formats.

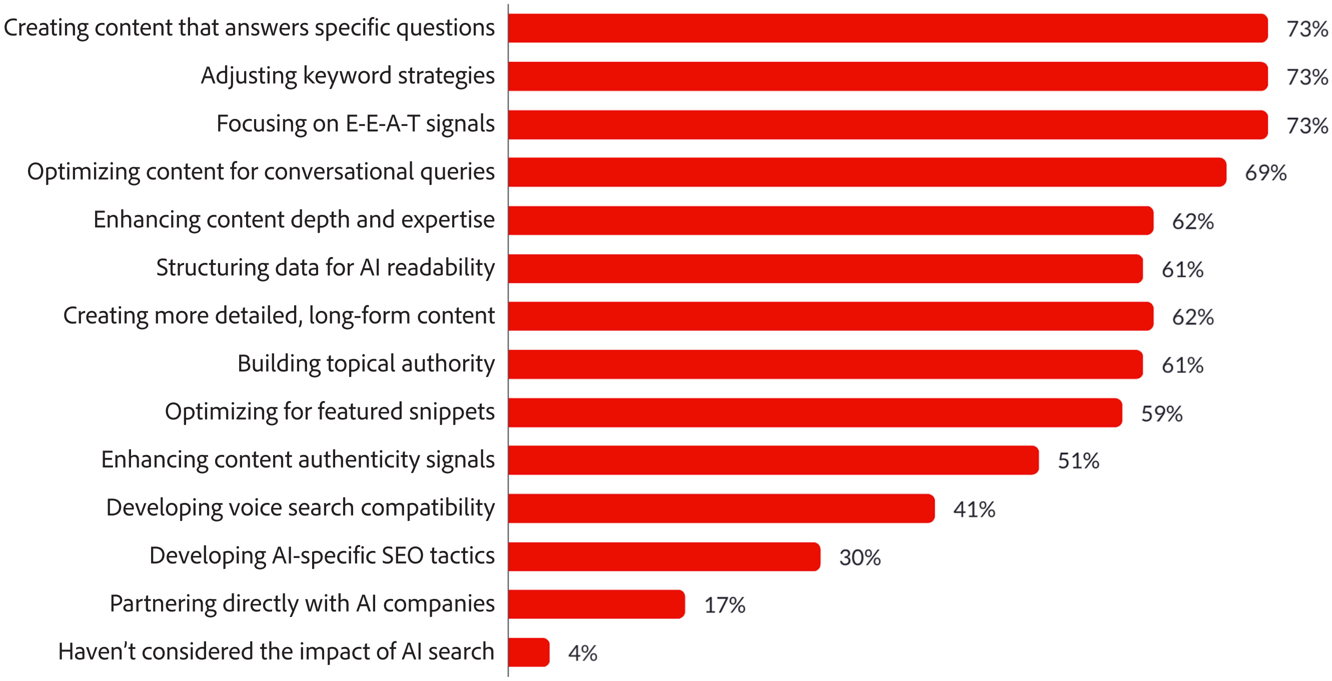
Modernize operations to scale creative advantage

To fully capitalize on GenAI, media leaders must evolve the content supply chain into an integrated, intelligent engine. This includes orchestrating AI-human workflows, automating rights management by market, and embedding dynamic compliance frameworks. Performance must be measurable across every version and channel. GenAI has unlocked new creative capacity. Now, operational strategy must rise to meet it, ensuring every asset is accurate, aligned, and ready to perform at scale.

Insight 07

AI-powered search is redefining how people discover information

M&E leaders expect **18%** of their current organic search traffic to shift to AI-powered platforms over the next 24 months



Note: This chart shows the % of M&E brands adjusting their search strategy for AI-powered discovery.

AI is fundamentally reshaping how audiences discover content

With Google's AI Overviews, Perplexity, and ChatGPT integrating search, users are shifting from keyword-based queries to intent-rich, conversational prompts. For M&E firms, where discoverability on search and recommendation engines directly impacts content viewership, this is not a minor adjustment—it's an existential shift. Traditional SEO playbooks optimized for volume and backlinks no longer guarantee visibility. AI-powered search favors content that delivers context, nuance, and human relevance in machine-readable form.

Content must now signal trust and structure for AI systems

LLM-based engines prioritize content that signals Experience, Expertise, Authoritativeness, and Trustworthiness (E-E-A-T). In practice, that means long-form reviews, expert breakdowns, and audience-specific storytelling outperform thin summaries or promotional pages. Publishers are investing in layered editorial content; studios are tagging assets with rich metadata; and platforms are optimizing content to be selected—not just indexed—by AI agents. Content has to be semantically strong and technically structured to rank.

Make content AI-visible, AI-readable, and AI-relevant

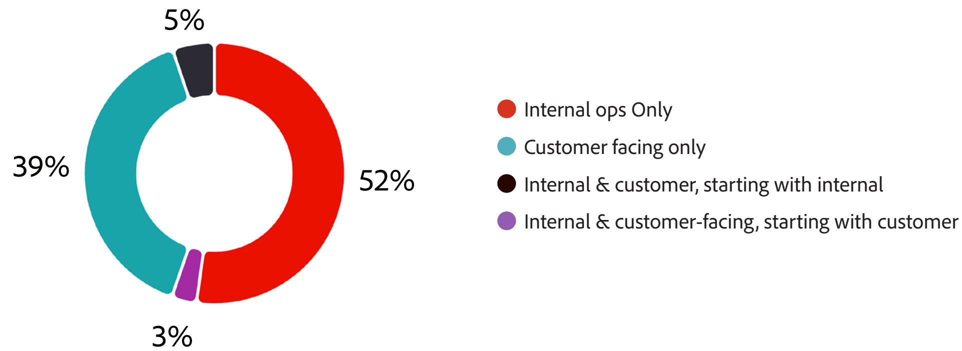
The shift toward "agentic AI" means more users will receive answers without ever clicking a link. Voice search on connected TVs, smart assistants curating personalized watchlists, and AI summarization tools mean that content must perform even when mediated by machines. Leading M&E players are evolving their content operations—training editorial teams to write for conversational queries, reworking archives for AI-friendliness, and rethinking performance metrics for an era where impressions may not equal engagement.

Insight 08

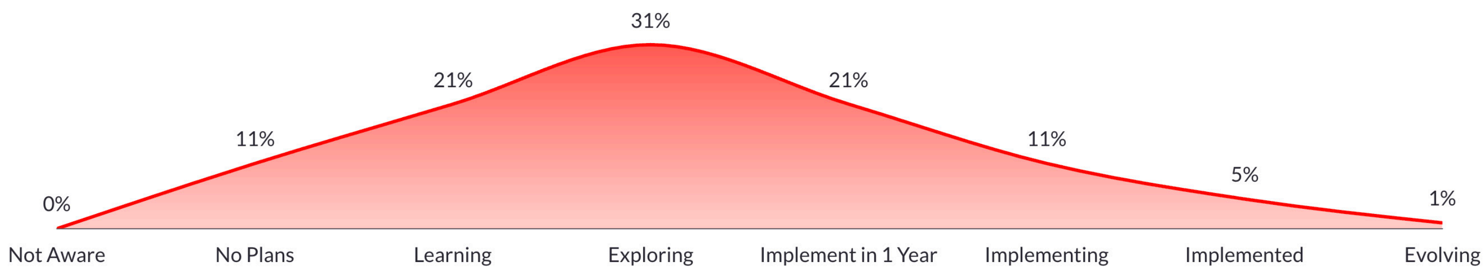
Agentic AI adoption Is slow but poised for strong growth

21%
of M&E firms are planning Agentic AI adoption within a year

52%
prioritize internal operations for Agentic AI implementation



Note: This chart highlights key areas where M&E firms are prioritizing the implementation of Agentic AI



Note: This chart shows the % of M&E firms awareness and plans for Agentic AI and adoption

Agentic AI is advancing behind the scenes

Most M&E firms are experimenting with agentic AI behind the scenes—powering support desks, automating metadata tagging, or enabling smarter audience segmentation. While these initiatives improve operational efficiency, they stop short of the real promise: AI agents that can autonomously orchestrate customer experiences across touchpoints. The slow pace is understandable—concerns around data governance, brand control, and content safety still loom large—but it's also a missed opportunity to shape the AI frontier.

Adoption is set to accelerate as maturity builds

The trajectory is changing fast. From only 5% adoption today, nearly 4 in 10 firms expect to deploy agentic AI by 2027. This shift coincides with the maturity of orchestrated AI frameworks and LLMs that can understand user context, manage workflows, and trigger business actions autonomously. In the M&E sector, this opens the door to agents that can dynamically curate content playlists, tailor ad experiences, or personalize onboarding journeys—at scale, and in real time.

Shift from pilots to platform-wide orchestration

Leading firms are already moving beyond chatbots and automation scripts. Support agents are evolving into full-service AI experiences that manage subscriptions, recommend content, and re-engage dormant users. Studios are piloting generative AI agents for creative tasks like storyline development and script prep. As generative and agentic AI converge, the next step is enterprise orchestration—embedding intelligent agents across workflows to drive engagement, efficiency, and experience without human intervention at every step.

Insight 09

The operating model Is the biggest impediment to transformation

Global Rank	Challenge	Media & Entertainment
1	Securing budget/investment for transformation	43%
2	Data integration and accessibility	40%
3	Integrating legacy and new technology systems	35%
4	Breaking down organizational silos	31%
5	Finding and retaining talent with right skills	25%
6	Managing channel complexity and coordination	22%

Note: This chart outlines the top internal challenges M&E firms face in executing digital and AI transformation strategies

Structural inertia is slowing innovation across M&E

For M&E firms under pressure to launch personalized content faster, monetize across platforms, and compete with digital-born players, execution is hitting a wall. Despite bold strategies, 43% of firms say securing transformation budgets is their top hurdle. In many cases, spend is still locked in traditional broadcast models, siloed departments, or redundant tech stacks. Without the ability to redirect investment quickly toward digital, content, and AI-enablement initiatives, innovation risks stalling at the start.

Siloed orgs and outdated systems block transformation

While 40% cite data integration as a critical issue, the disconnect between legacy infrastructure and emerging AI- and content-driven demands runs deeper. 35% of firms are struggling to align old and new systems. But notably, C-suite leaders see operational culture as an even bigger barrier: breaking silos ranks as the #1 challenge for CXOs. Without cross-functional collaboration between content, marketing, and monetization teams, even the most advanced platforms can't deliver personalized, scalable experiences.

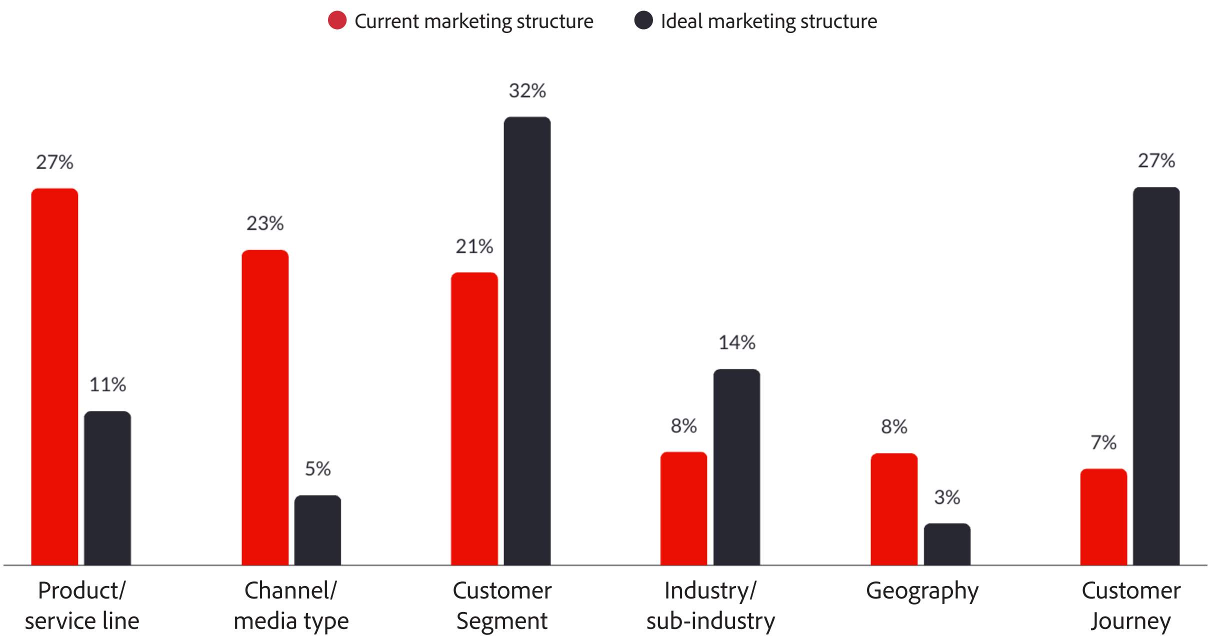
Rewire the operating model for speed and scale

Transformation won't come from tech alone. M&E firms must evolve from functionally rigid structures to fluid, cross-functional networks. That means aligning teams by audience journeys, not departmental lines. It means reallocating budgets based on signals, not silos. And it requires an operating rhythm built to absorb constant change. The brands that succeed will be those that match operational agility with consumer velocity—responding to real-time needs, not yesterday's org chart.

Insight 10

Firms want to evolve to customer-centric operating models

21% of M&E marketing teams are structured by channel/media	But only, **11%** say this should be the ideal	**Only 7%** are organized by customer journey, when 27% say it is ideal



Note: This chart shows current and ideal marketing organization structure.

Static organizational structures are no longer fit for purpose

Most M&E organizations still operate in silos—structured around product lines, media types, or content genres. But as consumer behavior shifts toward fluid, cross-platform engagement, these static structures are showing their age. What once supported operational clarity now hinders agility, personalization, and revenue orchestration across streaming, social, and mobile surfaces. The operating model is not keeping pace with the customer.

Firms are ready to shift, but few have acted

The future of media isn't about what you make—it's about who you serve. More firms are reimagining their foundations around audience segments and the full customer journey. This requires new collaboration across creative, tech, and monetization teams—breaking down traditional walls between content, data, and experience delivery. Organizational design must reflect the consumer's path, not internal functions.

Redesign operating models around audience experience

Firms must treat operating model redesign as more than internal housekeeping. It's a growth lever. The shift to customer-centricity means organizing around journey stages, life cycles, and behavioral signals. That includes fusing creative and tech teams, aligning KPIs across silos, and embedding agility into decision-making. Future-ready firms will enable hyper-personalized experiences not just through technology, but through structure—designed to adapt to the customer, not the org chart.

Conclusion & recommendations

The future of M&E will be defined not by scale, but by how intelligently, personally, and consistently brands engage across every screen and channel.

This research reveals four critical imperatives:

- Personalization must scale across the full journey from discovery to retention with relevance delivered in real time, across every touchpoint.
- Marketing must drive subscriber outcomes, evolving from a brand function to a commercial growth engine aligned to acquisition, LTV, and churn prevention.
- GenAI is already reshaping content economics, demanding new oversight, orchestration, and creative infrastructure to scale with precision.
- Operating models must realign around the audience, breaking down silos to support agile, cross-platform engagement in a fast-moving, AI-driven world.

Strategic priorities for M&E leaders

1. **Close the personalization gap across the journey**
   Go beyond watchlists and recommendations. Deliver dynamic, real-time personalization across mobile, social, CTV, search, and GenAI interfaces driven by behavior, context, and audience intent.

2. **Make content discovery a core product experience**
   Invest in metadata enrichment, search optimization, and AI-powered recommendation engines that make finding content as intuitive and satisfying as watching it.

3. **Rewire marketing for subscriber performance**
   Redesign marketing organizations around acquisition, retention, and LTV metrics. Align teams, data, and platforms to subscriber growth not just brand awareness.

4. **Transform content operations with GenAI at the core**
   Integrate GenAI into your content supply chain from script generation to localization to promotion while embedding quality control, compliance, and performance tracking throughout.

5. **Modernize data platforms to enable real-time orchestration**
   Move beyond fragmented CDPs and CMSs. Build composable, interoperable systems that unify identity, enable data collaboration, activate insights, and drive next-best-action at scale.

6. **Restructure teams around audience journeys**
   Break down product, content, and channel silos. Organize around customer segments, lifecycle stages, or engagement intents to support fluid, cross-platform experiences.

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