

State of the Media Industry 2025



A Call to Own, Innovate, and Lead



Introduction



The media industry in 2025 stands at a defining moment. Platforms continue to rewrite distribution rules, audience behaviors are shifting in ways legacy models cannot serve, and AI accelerates both opportunity and disruption. Publishing at scale, chasing fleeting referrals, and relying solely on advertising no longer guarantee sustainability.

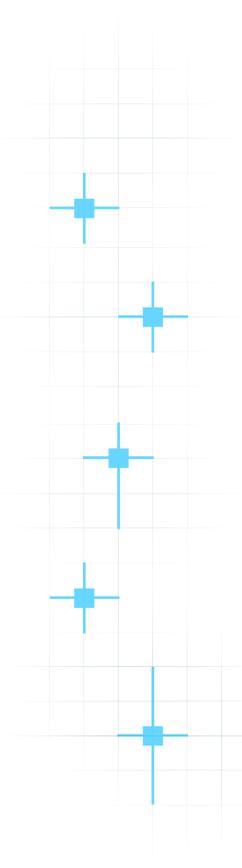
Arc XP's perspective is clear: media companies must rethink content value and own their audience relationships or risk irrelevance.

Content creation itself is not what makes media companies valuable. The true value lies in original reporting, the experiences built around it, and the trust that sustains long-term loyalty.

This guide brings together industry research, executive perspectives, and case studies to present a framework for the future. These themes are not abstract. They represent the operating principles media businesses must adopt to survive and thrive in an AI-driven era.



From Commodity to Value



Much of today's content is indistinguishable. Text-heavy stories can be scraped, summarized, and repackaged in seconds by AI or competitors. Even scoops lose value quickly once redistributed endlessly across platforms.

As **Matthew Monahan, President of Arc XP**, warned at this year's INMA World Congress:

“If your content is easily replicated by AI or repackaged elsewhere, it’s not valuable.”



The obsession with speed has also lost its edge. Breaking a story first only matters for moments before it blends into the wider feed. What endures is not the act of writing, but the substance: original information, context, and insight. Audiences will not pay for recycled text; they will pay for credibility, exclusivity, and trust.

Arc XP and Digiday's State of AI in the Newsroom report underscored this reality:

94%

of publishers already use AI for efficiency

82%

automate scheduling and distribution,

90%

cite "maintaining a competitive edge" as their top challenge.

Speed alone cannot deliver that edge. Differentiation does.

Graham Media Group, an innovative, audience-focused local news and digital media company with seven major market TV stations, offers a case study in transformation. By consolidating broadcast, digital, and streaming into a story-first newsroom, they stopped duplicating effort and elevated original reporting across platforms.



As **Michael Newman, Director of Transformation**, explained:

"We essentially built three separate newsrooms: one for broadcast, one for digital, and one for streaming." (...)

Newman said.

"Fragmentation isn't scalable. We need to identify the expert and scale their work across platforms."

Takeaway: Commodified content is a dead end. The future belongs to companies that move up the value chain, focusing on irreplaceable insights and structuring workflows so every story travels farther.



The Multimedia Imperative

Single-format media businesses are obsolete. If you deliver only text-based content, you will not survive. Multimedia is both an antidote to commoditization and a pathway to stronger audience connections.

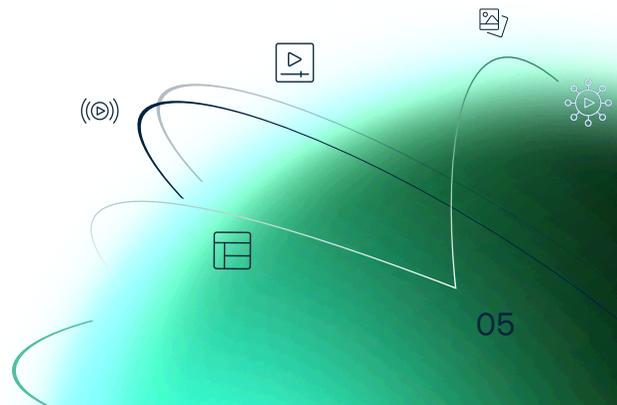
Video, audio, and interactive formats reveal the process behind reporting, building transparency and personality in ways audiences already expect from creators and influencers. TikTok creators have proven that loyalty is built not through polished long-form reports but through authentic glimpses into creation.

Adding audio versions of text stories is not true multimedia. True multimedia means designing stories to live as podcasts, short-form videos, vertical explainers, and interactive visuals, each carrying the brand's distinct voice. Audience data supports this shift: [the Reuters Institute's 2025 report](#) finds continued movement toward social

and video for news discovery, especially among younger cohorts, while direct visits to news sites have softened in many markets. At the same time, the ad market is rewarding video: U.S. internet ad revenue reached \$259B in 2024, with digital video among the fastest-growing segments.

[Graham Media](#) has embraced this philosophy: one story package powers a broadcast rundown, a digital article, a push alert, and a short-form video. This is not duplication; it is amplification.

Takeaway: Multimedia isn't optional. It is the only way to slow commoditization and deliver experiences audiences cannot get from scraped text alone.



Owning the Audience Relationship

For too long, media companies optimized for reach over relationships, chasing algorithmic traffic spikes instead of cultivating loyalty. The result: fragility. When platforms change their rules, publishers lose audiences overnight.

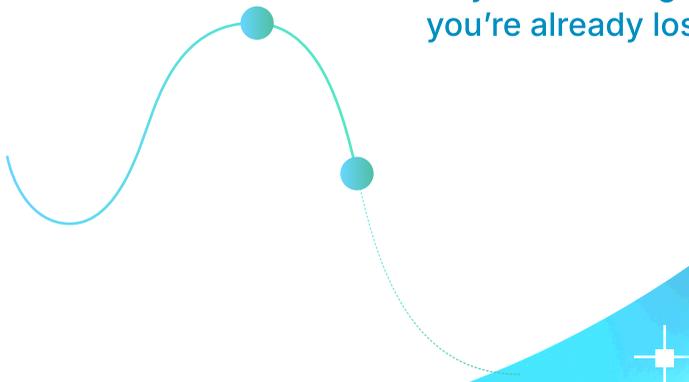
The remedy is simple: stop renting, start owning. Direct channels—apps, newsletters, memberships, and events—must become the backbone of the business. Communities matter more than comments; relationships matter more than reach.

Almar Latour, CEO of Dow Jones and Publisher of The Wall Street Journal, delivered this reality check at [INMA World Congress](#):

“Search is like casting a fishing net. AI is spear fishing—targeted, detailed, personal.”

In other words, success in the age of AI won't come from mass visibility but from precision, trust, and value. Latour put it bluntly:

“If you're talking about traffic, you're already losing.”



The [Washington Post's Ask The News](#) initiative embodies this shift, allowing readers to pose questions and receive AI-powered, journalism-grounded answers. The goal is dialogue, not distribution.

Independent voices illustrate the stakes. Noor Tagouri, American journalist and activist, told audiences at [INMA World Congress](#):

“Ten out of ten of my students no longer get their news from brands, they get it from individuals.”

The real metric is the depth of audience connection—not pageviews, but partnerships. Publishers that build direct, personal relationships with their users will thrive as AI reshapes discovery.

As Arc XP's Monahan noted:

“Audiences are no longer passive consumers. They're stakeholders that expect to participate.”

Gen Z trusts people over institutions. Media companies that ignore this will lose relevance; those that embrace transparency, personalization, and partnership can regain it.

AI is accelerating this shift. Relationships are moving from one-to-many to one-to-one, with each audience member receiving a personalized mix of stories, videos, and interactions. Many publishers are now experimenting with AI to better personalize news content, but audiences have mixed feelings. Some worry that personalization could cause them to miss important stories, while others see clear benefits in making news more accessible and relevant. According to the [Reuters Institute Digital News Report 2025](#), there's enthusiasm for:

27%

AI-driven summarization,

24%

Translation into different languages

21%

Better story recommendations

18%

Chatbots for asking questions about the news

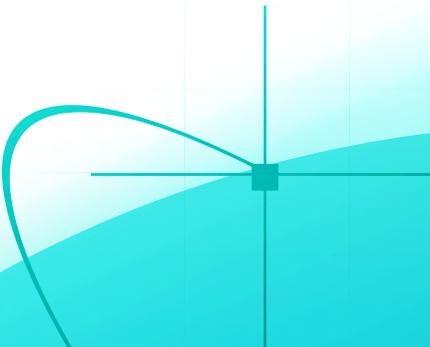


Early usage data shows there's still time to lead:

Only about **7%** of people currently use AI chatbots weekly for news, rising to around **15%** among those under 25,

suggesting an opportunity to build direct relationships before AI intermediaries mature. Although, the deeper opportunity isn't just in automation but in strengthening trust and loyalty through human connection.

Platforms like Substack, a media platform for video, writing, podcasts, and creator-centered communities powered by subscriptions, illustrate that appetite. With roughly 5 million paid subscriptions, Substack signals that consumers value direct, personal relationships with creators, even in an age of AI-driven personalization.



Takeaway: The companies that thrive will own their audience relationships, bundle compelling experiences, and personalize at scale. Reach may have once mattered, but relevance now defines resilience.



Operating Like a Business

Journalism cannot survive without financial sustainability. For decades, revenue was treated as separate from the newsroom. That era is over. Today, media companies must operate like businesses first. This requires rethinking how every department, including editorial, product, technology, and revenue, contributes to long-term financial health.

Without a strong business strategy, journalism has no future. A media organization that doesn't prioritize financial sustainability will eventually have no mission left to protect.

At [Ignite 2025](#), an event co hosted by [Arc XP](#), [Viafoura](#), and [Pugpig](#), Dustin Titus, Chief Revenue Officer at [ZoomerMedia](#), emphasized that in today's fragmented media landscape, publishers must adopt a multifaceted approach to revenue generation.



Borrowing from the creator economy, Titus urged publishers to look beyond legacy advertising and embrace strategies like leveraging first-party data, developing subscription and membership products, and extending content into video, events, and other formats.

He cautioned:

“Relying on a single revenue stream leads to stagnation.

Advertising alone is too volatile. True resilience comes from embracing diverse models that reinforce one another. Titus pointed to the challenges facing legacy media—declines in organic traffic and discoverability, rising licensing costs, inflation, and shifting consumer habits—as reasons to break old patterns. To adapt, he advised publishers to launch innovative media products, expand lifestyle and service journalism that audiences actively seek out, and build partnerships that open new avenues for revenue, including branded content and direct commerce opportunities.

A central theme of his perspective was data-driven decision-making. Understanding audience preferences through both first- and third-party data allows publishers to tailor offerings that people will pay for and engage with. Titus encouraged media companies to move away from linear, traditional sales funnels and instead deliver a dynamic, multiscreen experience that reflects how audiences actually consume content today.

For 2025, his call to action was clear: innovate boldly, diversify revenue streams, and create engaging, high-value content that earns both attention and financial support.

Survey data backs the strategic pivot. [WAN-IFRA’s World Press Trends Outlook 2024–25](#) reports publisher optimism about diversified growth, with print and advertising now less than half of total revenue for many respondents, evidence that subscriptions, events, B2B services, and other lines are becoming core, not ancillary.



And although Google's third-party-cookie phase-out has been paused with timelines uncertain, the direction of travel toward first-party data and consented identity is unchanged; leaders shouldn't wait on privacy policy ambiguity to modernize their revenue and data stacks.

But a diversified revenue strategy is only one side of the equation. Long-term sustainability also depends on how well organizations align their business models with their people. Even the most innovative products or revenue streams will falter if the culture behind them is weak or disconnected.

Operating like a business means not just diversifying income, but also creating an environment where employees are empowered, engaged, and invested in the company's growth.

As Jessica Peppel-Schulz, CEO of Tamedia, noted at INMA World Congress:

"My most important KPI isn't profit, it's employee satisfaction. Because if my people are energized, motivated, and on board, the results will follow."

Culture and revenue are not separate. They reinforce each other. A newsroom with engaged, motivated employees produces stronger journalism, which in turn drives the audience loyalty and revenue necessary for long-term survival.

Takeaway: Every function—editorial, technology, product, revenue, and culture—must be accountable for growth. Sustainable journalism requires business shrewdness: aligning people, content, and strategy around profitability to ensure the mission endures.



AI as a Strategic Weapon

AI is no longer just another newsroom tool—it is fast becoming the foundation of competitive advantage. The uncomfortable truth is that many media businesses will not survive AI's rapid evolution, and the greatest risk is assuming that traditional models can withstand the shift.

The Arc XP–Digiday study underscores this reality:

while **94%** of publishers use AI for efficiency.

only **24%** have integrated it into core workflows.

Yet momentum is undeniable, with

97% increasing newsroom AI budgets in 2025.

As Joey Marburger, VP of Content Intelligence at Arc XP, put it:

"It's not about having ChatGPT write every article. It's about workflow and additive things like copy edits, headlines, summaries, tags, translations, and other operational tasks."

Still, he warns against innovation in isolation:

"If we build something we think is amazing and all the newsrooms reject it, then it's a complete failure."

Early results are promising—faster content creation, higher quality, and operational efficiency—but risks remain: misinformation, eroded audience trust, and the threat of competitive sameness.



As Richa Deshwal, Head of AI Strategy at The Globe and Mail, stressed at [Ignite 2025](#):

“AI should be a co-pilot, not a replacement.”

But the co-pilot model will not last forever. “Human-in-the-loop” approaches will soon be unnecessary, and even undesirable, as AI capabilities accelerate. Media leaders must ruthlessly assess which parts of the content process require human perspective and which can be automated.

The smart publishers are already moving beyond efficiency. They are treating AI as a multiplier, turning primary reporting into infinite secondary content across formats: written, audio, and video, personalized at scale. They are reorganizing around three strategic imperatives:

1

Governance and hybrid architectures, that tune models on first-party data.

2

Primary-to-infinite-secondary workflows, unlocking multi-modal content at near-zero cost.

3

Transparent experiences that keep outputs grounded in verified journalism.

The takeaway is clear: AI isn't your competitor. Your competitor is the media brand using AI better than you. To survive and win, media businesses must treat AI not as a side experiment, but as a strategic weapon embedded in the core of their business.



The Cultural Operating System

No strategy succeeds without culture. Technology adoption, AI integration, and revenue diversification all collapse without a foundation of trust, clarity, and shared purpose. Culture isn't a "soft" factor—it's the operating system that makes every other initiative run.

At INMA World Congress, Bob Woodward, legendary American investigative journalist for The Washington Post, reminded peers of this essential truth:

"Stick to the truth. Cross-check everything. Don't let the noise drown out what matters."

His point underscores a reality every newsroom faces: credibility is a cultural discipline, not a technical feature. Leaders across the industry echo this idea in different ways.

Dr. Rainer Esser, CEO of DIE ZEIT, attributed the organization's **320%** growth not to technology alone, but to a culture of collaboration. Katharina Link, CEO of Pulse Africa, emphasized that experimentation must be constant—not a one-off project but a cultural reflex. And Jessica Peppel-Schulz, CEO of Tamedia, knows transformation isn't just about strategy, it's about people. She reframed the moment with optimism:

"The old party is over, but everyone's invited to the new one."

Together, these perspectives highlight that culture isn't just about values, it's about building resilience, adaptability, and openness to reinvention.



For Gen Z journalists, the cultural stakes are even sharper. Many face burnout, low pay, and outdated workflows, yet they continue to push for authenticity, empathy, and transparency. Their expectations are clear: leadership must create an environment where journalism feels relevant, sustainable, and human. As one young reporter put it:

“If news isn’t on TikTok, Instagram, YouTube, or podcasts, it isn’t reaching us, and AI can help. There’s so much that slows us down, transcribing, formatting, tracking data.”

This is a call not only for new tools but for a new contract between employers and journalists: fair pay, clearly defined roles, transparent leadership, and investment in systems that remove friction so reporters can focus on what matters: telling meaningful stories.

Takeaway: Culture is the operating system of transformation. Without it, no technology or strategy will succeed. But when culture prioritizes trust, collaboration, and experimentation, it doesn’t just enable change, it accelerates it.



Conclusion: The Call to Action

The old playbook—publish widely, monetize with ads, hope audiences return—is finished. The new playbook is built on trust, relationships, diversified revenue, empowered people, and AI as a strategic foundation.

- If your content is easily replicable, it's not valuable.
- Multimedia is the future; text alone is obsolete.
- Owning the audience relationship is survival.
- Journalism must operate like a business, not a siloed craft.
- AI will replace media companies that fail to adapt.

As Arc XP's Monahan challenged:

"The fear of standing still should be greater than the fear of AI."

Arc XP's mission is to power this evolution, but the responsibility lies with every leader in the industry. The future belongs to those who stop renting audiences, stop defending old models, and start building the experiences only they can own.



