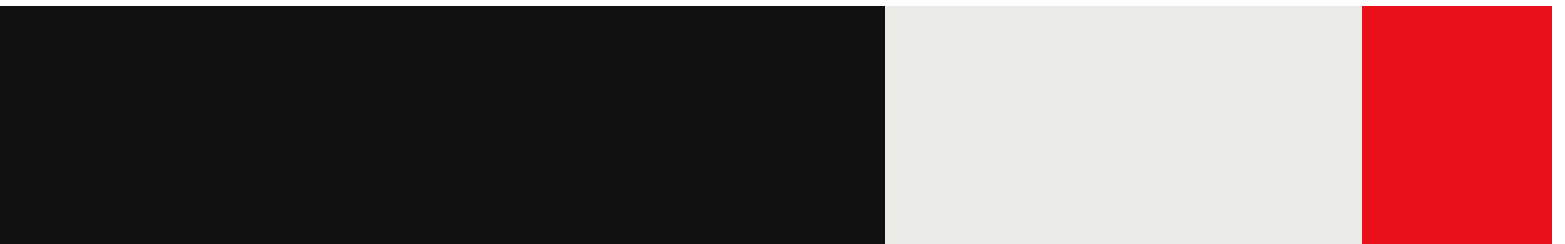


6 very specific predictions for the rest of 2024: Streaming deals, standardization, Starbucks, and more

Article



The year is nearly halfway over. As we prepare for H2, our analysts have been hard at work debating some very specific—and potentially unlikely—predictions that could play out in the coming months. Everything from retail media standardization to drone delivery to AI partnerships is at play over the rest of 2024. Here are some of our analysts' hottest takes.

The prediction: Paramount will not be acquired by its current suitors and will instead be sold for parts.

The argument: Paramount's collection of assets, which include movie theaters, a deep content library, and a collection of TV channels, will not be valuable enough for any one buyer, our analyst Max Willens said on a recent episode of our "[Behind the Numbers](#)" podcast. "Paramount Plus is kind of a question mark because it's currently a money-losing business. It's got some nice content inside it, but it's more of a nice-to-have rather than a must-have the way a [Netflix](#) might be."

If Paramount is indeed sold piecemeal, it will show how big media companies are struggling to stay profitable across assets as streaming takes over. "This is going to basically end up being sold in parts as opposed to somebody coming in and buying the whole business. And I think that's where we're at with the big media companies," Verna said.

The prediction: Retail media measurement won't standardize until peak growth subsides.

The argument: As the off-site era of [retail media](#) ad spending matures, driven by [aggregators](#) like Criteo, The Trade Desk, Skai, and Pacvue, the influx of ad dollars is inhibiting incentive for standardization, argued Willens. "They've got at least a year before the pressure to get to a standard rises up," he said.

[Amazon's](#) control of 77.0% of the US [retail media](#) market, per our forecast, will contribute to the lack of standardization, as the giant doesn't have much motivation to work with smaller players on [measurement](#).

But that won't stop [advertisers](#) from seeking a standard. "I think that there's going to be more pressure, immediate pressure, to figure out a way to measure success," said our analyst Suzy Davidkhanian.

The prediction: The AI gold rush will continue into H2.

The argument: As AI search threatens publishers' ad visibility and revenues, many are joining forces with AI companies to stay visible and profitable. Publishers from Shutterstock to the

Associated Press to Axel Springer (our parent company) have inked deals with OpenAI, but many still have not. “I think that publishers that are not as well-known brands ... they have even more incentive to do this,” argued Verna.

That’s good news for AI companies, but it isn’t necessarily good news for publishers. “It’s just another example of publishers getting the short end of the stick, digitally speaking, really since the dawn of the internet,” Verna said.

“I continue to find it bewildering that media companies and other publishers have not only inked these deals but have inked them at prices that to me are astonishingly low,” said Willens.

The prediction: The NBA contract will go to Disney, NBCUniversal, and Amazon.

The argument: With Warner Bros. Discovery hesitant to take the [over \\$2 billion deal](#), Disney, NBCUniversal, and Amazon could split the contract, said Verna. “This would be the first time that a major US league sports package is essentially a [streaming](#) deal,” he said, emphasizing the milestone the bundle would represent.

The prediction: Nordstrom will go private within the next 12 months.

The argument: Going private would allow Nordstrom flexibility to pursue long-term success, said Davidkhanian. “Being able to go private helps them think about the long game instead of worrying about shareholder value in the immediate term,” she said.

Nordstrom considered going private six years ago, but ended up turning down the [\\$8.4 billion offer](#). Now [valued at \\$3 billion](#), Nordstrom would be unlikely to make the same decision, Davidkhanian said.

The prediction: Starbucks will debut drone delivery.

The argument: “The next iteration of, ‘how do you get coffee into hands quickly,’ is through [drone delivery](#),” said Davidkhanian. [Walmart is expanding its own drone delivery pilot](#), setting the precedent for Starbucks.

But hot coffee complicates drone deliveries. “I am a drone [delivery](#) skeptic,” said Verna, “I also think that if there were going to be drone delivery, coffee is not where I would invest.”

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