Innovation and AI

CES: From Media Buying to Decision Influence

How AI-Powered Devices Are Rewriting Advertising, Commerce, and the Role of Agencies

Zenith
The ROI agency

Foreword

Every year's, CES unveils innovations that can seem incremental in isolation, such as smarter TVs, more connected cars, lighter wearables, but when viewed together they point to a far more profound shift: the emergence of a new operating system for consumer decision-making.

AI is no longer confined to apps or platforms; it is being embedded directly into the devices that shape daily life, observing context, interpreting intent and increasingly mediating choices in real time.

This matters because media, advertising and commerce have always hinged on one critical question—when to show up—and AI is now redefining that moment. As traditional, channel-based media models strain under fragmentation, privacy constraints and scarce attention, AI-powered devices are generating a continuous stream of signals—not cookies, but real-time indicators of behaviour and intent—that automate decisions across environments.

Written for brand leaders, media strategists and agencies navigating a post-cookie world, this report explains why the next era of media will be won by understanding how AI decides what gets suggested, chosen and trusted—and what that means for staying relevant over the next decade.

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Signal Ownership: How AI-Powered TVs Are Turning Television into a Programmatic Marketplace

At this years CES, LG introduced the next generation of its AI-powered television platform, embedding on-device AI directly into the operating system. Rather than functioning purely as a content navigation tool, this AI layer learns from viewing behaviour, interaction patterns, and contextual usage — processed locally and anonymised.
This represents a fundamental shift in the role of the television.

The TV is no longer just a screen for content delivery; it is becoming a signal-generating device. As broadcast viewing continues to decline and on-demand consumption becomes the default, intelligence increasingly sits at the device level — not the channel level.

From Broadcast Reach to Signal-Based Addressability Traditional TV buying was built on approximation:

- Programmes as proxies for audiences
- Dayparts as proxies for behaviour
- Reach as a proxy for influence

As television moves from broadcast to on-demand, these proxies will begin to break down. What may replace them is not simply “addressable TV”, but something more powerful: AI-derived household signals.

What LG Now Owns: Signals, Not Inventory

With AI embedded at the device level, LG effectively owns a new layer of value: anonymised, predictive household signals.

These are not personal identifiers.
They are probabilistic insights such as:

- Upgrade intent
- Price sensitivity
- Lifestyle orientation
- Category openness
- Decision-making velocity

For media buyers, this is a meaningful shift. Instead of buying TV inventory tied to content, advertisers can begin to buy access to signals that indicate relevance.

In this model, LG does not primarily sell impressions.

LG sells the opportunity to bid against inferred intent.

The Shift to Programmatic Television Logic

This evolution takes television decisively closer to programmatic buying mechanics. The logic becomes familiar:

- Signals are generated by the device
- Signals are anonymised and aggregated
- Advertisers decide which signals align with their objectives
- Media activates when those signals are present

Rather than planning against schedules or shows, media buyers plan against conditions. For example:

- When a household exhibits early automotive consideration signals
- When entertainment behaviour shifts towards premium experiences
- When price sensitivity increases
- When lifestyle patterns suggest a new life stage

This is television buying that behaves like digital — but with the scale, attention, and household truth of TV.

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What This Means for Media Buying Teams

As AI-powered TVs scale, media buying will increasingly resemble signal trading rather than inventory planning.

Key changes include:

- Strategy shifts from channel selection to signal selection
- Optimisation shifts from reach curves to signal performance
- Measurement shifts from exposure to probability of outcome

This also reframes the role of agencies. Value no longer comes from access to inventory, but from:

- Interpreting signal quality
- Deciding which signals matter
- Connecting signal activation to real-world outcomes

The Consumer Perspective

This model only works if it delivers value to consumers. Because signals are:

- Anonymised
- Processed on-device
- Used to reduce irrelevant advertising
- Consumers experience:
- Fewer ads
- More relevance
- Less repetition
- Better alignment with real needs

Signal ownership, when governed responsibly, becomes a relevance engine — not a surveillance model.

Our Prediction: Television Becomes a Signal Exchange

We believe AI-powered televisions mark the beginning of television's transformation into a signal exchange.

In this future:

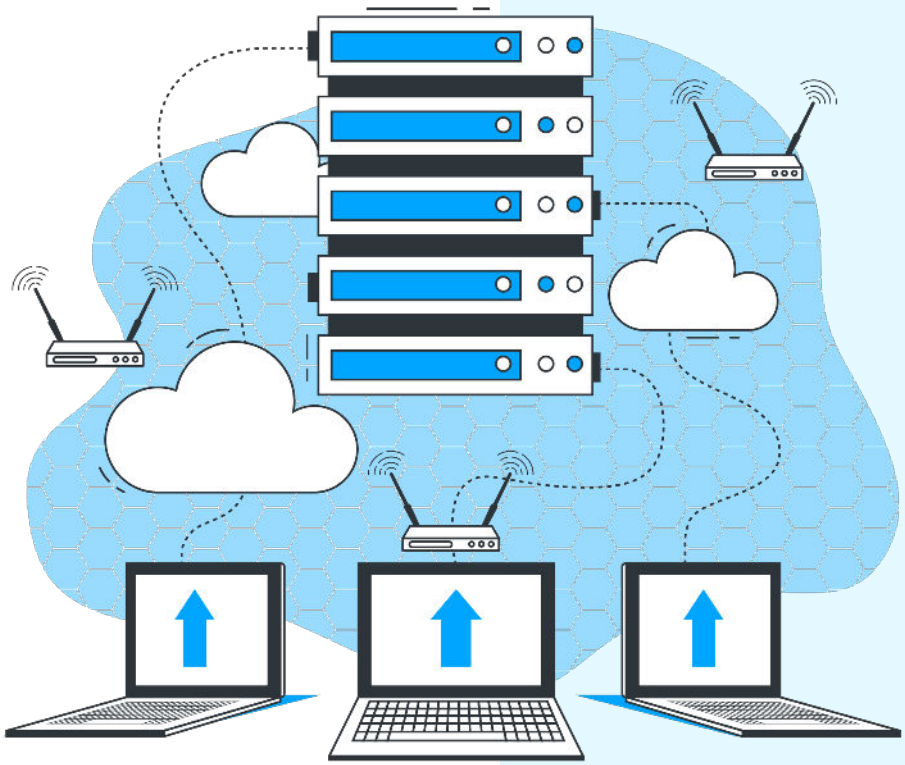
- Media owners compete on signal quality
- Advertisers compete on signal insight
- Agencies compete on signal strategy
- Television buying will no longer be defined by what is watched, but by what the device understands about the household.

The winners will not be those who buy the most media — but those who know which signals to bid for, when, and why.

Why This Matters Now

CES announcements confirm that intelligence is moving onto the device itself. As broadcast fades and on-demand dominates, the television becomes the most stable, high-signal environment in the home.

Signal ownership is emerging as the next battleground in media — and AI-powered TVs are quietly redefining how television is bought, sold, and valued.



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In-Car AI Automation: When Navigation Becomes Negotiation

Google reinforced the expansion of Android Automotive OS with Google built-in, positioning AI as an automation layer rather than an infotainment feature. Embedded directly into the vehicle's operating system, the platform combines navigation, voice, commerce, and contextual intelligence to automate complex, real-world decisions while consumers are in motion.

> The defining product capability is AI-driven decision automation.

Instead of requiring drivers to manually search, compare, and select, the system allows them to express a goal — for example, charging the car while stopping to eat — and then automates the planning, filtering, and execution of that decision in real time.

> This is not content discovery. It is automated choice.

What the Automation Does for Consumers

A single prompt such as:

"We need to charge soon, and we're a bit hungry — what do you recommend?"

activates an AI workflow that:

- Assesses battery state and charging urgency
- Evaluates route options and deviation tolerance
- Identifies fast-charging locations
- Matches nearby restaurants based on inferred or lookalike preferences
- Filters options by price sensitivity, ratings, and time constraints
- Surfaces a small set of high-confidence recommendations
- Offers to book, navigate, and transact on the consumer's behalf

The consumer remains in control, but the complexity is automated away. The value exchange is clear: less friction, fewer decisions, better outcomes.

What This Means for Brands

For brands, this automation changes the competitive landscape entirely. Brands are no longer competing for attention; they are competing to be included in an automated decision.

In this environment:

- Visibility is conditional
- Relevance is enforced by AI
- Quality and data integrity matter more than creative volume

A brand can only appear if it:

- Integrates with the platform (availability, pricing, booking)
- Meets quality and trust thresholds
- Aligns with the consumer's situational constraints

Sponsored recommendations become the primary commercial lever — not as forced placements, but as priority weighting within AI-curated choices. This mirrors Search monetisation:

- Relevance first
- Sponsorship second
- Transparency always

Brands that are not AI-readable, AI-integrated, or AI-trusted simply do not enter the consideration set.

What This Means for Media Agencies

For media agencies, this marks a shift from media buying to decision orchestration.

The role of the agency evolves from buying placements to designing and activating intent strategies

Key changes include:

- Planning against automated decision moments, not channels
- Defining which signals are worth bidding on
- Managing sponsored recommendation logic
- Measuring success by actions, not impressions

Agencies become responsible for:

- Interpreting AI signals
- Aligning brand data with platform requirements
- Ensuring relevance without eroding trust

The agency value equation shifts from scale management to precision and timing.

Our Prediction: Automation Becomes the New Media Surface

We believe AI-driven automation will replace traditional ad surfaces in high-intent environments. In-car AI is the first clear example:

- The screen matters less than the decision
- The message matters less than the outcome
- The media moment is the automation itself

As this model scales beyond cars into homes, retail, and wearables, the same logic will apply.

> Brands will not ask: “How do we get seen?”
> They will ask: “How do we get chosen?”

Media agencies that understand this shift early will define the next generation of addressable, outcome-driven media.

Meta Ray-Ban Display: When a Simple Journey Generates Continuous Brand Signals

Meta Ray-Ban Display is the next generation of AI wearables from Essilor Luxottica and Meta. The product combines cameras, microphones, gesture control, and a lightweight in-lens display to deliver continuous, context-aware AI assistance.

Unlike phones or dashboards, Meta Ray-Ban Display operates hands-free and screen-free. The AI sees what the wearer sees, understands intent as it evolves, and responds visually and conversationally in real time.

Its defining capability is journey automation — guiding a person through physical space while interpreting context, intent, and preference continuously.

Use Case

"How do I get to the hotel?"

The AI provides subtle visual cues to guide them to the rideshare pick-up point and orders an Uber automatically.

During the drive, the driver asks:

"Do you want to take the toll road?"

The traveller asks:

"What did he ask me?"

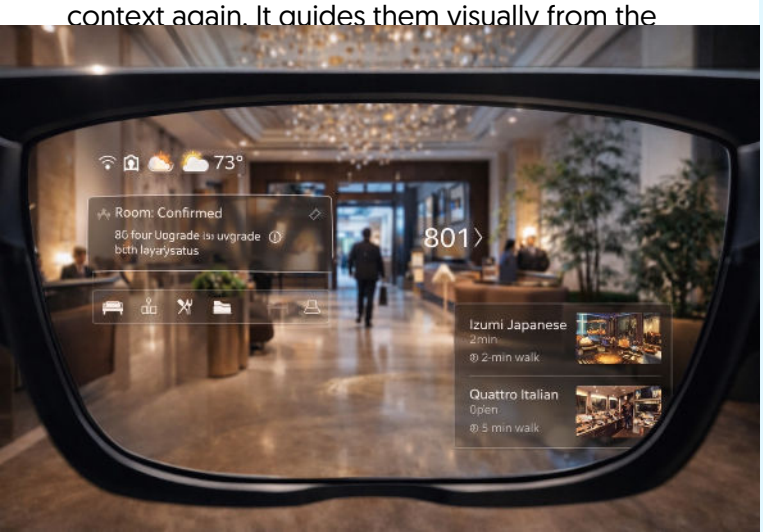
The AI translates instantly, displaying the phrase visually and allowing the conversation to flow naturally.

As the car approaches the destination, the AI adds a contextual note:

"That shopping centre has a Nike store. The trainers you were looking at recently are currently on sale."

No interruption — just a relevant observation at the right moment.

Arrival: Where Hospitality Signals Emerge
As the traveller reaches the hotel, the AI shifts context again. It guides them visually from the



"You're on the 8th floor. Your room is to the left."

At this moment, the system can infer multiple signals:

- Arrival status
- Time of day
- Travel fatigue
- Loyalty membership
- Past stay behaviour
- Dining preferences

This creates natural opportunities for the hotel to assist. For example, the AI can surface:

"As a member of Accor's loyalty programme, your room is eligible for an upgrade tonight. Would you like more details?"

Or:

"You have a dining credit available. Based on your preferences, I recommend the Japanese restaurant. Shall I reserve a table?"

These are not adverts. They are service-led moments, enabled by signals already generated by the journey.

What This Journey Reveals

A single journey — airport to hotel room — produces a rich stream of signals:

- Location and movement
- Intent and urgency
- Language and cultural context
- Retail and dining interest
- Brand affinity
- Loyalty status
- State (arrival, fatigue, readiness)

Each signal creates a potential moment of relevance. Some moments are best served organically. Some can support sponsored inclusion. Many are best left untouched.
The value lies not in maximising exposure, but in choosing the right moments.

What This Means for Brands

AI wearables do not create more advertising opportunities — they create better ones.

Brands can intersect journeys when:

- They add genuine value
- The timing is appropriate
- The context supports action

Relevance becomes mandatory. Poor timing simply results in silence.

What This Means for Media Agencies

For media agencies, this changes the job fundamentally. Agencies help brands:

- Understand which signals matter
- Identify which journey moments are valuable
- Decide when to appear — and when not to
- Optimise for organic inclusion in AI conversations
- Design sponsored intersections that feel natural and useful

Media planning becomes journey mapping.
Media buying becomes signal orchestration.

Our Prediction: Media Will Follow the Journey, Not the Screen

We believe AI wearables like Meta Ray-Ban Display signal a future where media follows people through real-world journeys, rather than competing for attention on screens.

The most effective media will be:

- Quiet
- Timely
- Useful

A simple journey — from airport to hotel room — shows how AI can turn everyday movement into a sequence of meaningful, brand-relevant moments.

> The opportunity is not to speak more often.
> It is to speak only when it matters.

From Media Buying to Decision Influence: The Signal Stack Revealed

CES does not reveal a single breakthrough product.
It reveals a system coming into focus.

Across AI-powered televisions, in-car operating systems, and wearable AI companions, one pattern repeats: intelligence is moving closer to the consumer, embedded directly into the devices that shape everyday life.

These devices do not compete.
They connect.

- AI TVs observe household behaviour over time
- Cars interpret situational context while people are in motion
- Wearables understand personal state, readiness, and intent

Together, they form a continuous layer of understanding — not based on tracking identities, but on interpreting signals.

This is the signal stack.

From Channels to Signals

For decades, media buying was organised around channels:

- TV
- Digital
- Audio
- Out-of-home

The trends we've spotted could be the end of this logic.

In an AI-mediated world, media is not activated by channels, but by conditions:

- When intent is expressed
- When context is relevant
- When readiness is high

> Signals replace slots. Moments replace placements.

Media value shifts from how many people saw something to whether the right person was helped at the right time.

This system gives rise to a new advertising model built on three layers:

Organic AI inclusion
Brands appear in AI conversations because they are the best answer. This requires brands to be understandable, trusted, and relevant within AI reasoning systems.

Sponsored recommendation
Brands can influence prioritisation at moments of declared or inferred intent — transparently and conditionally — without breaking relevance or trust.

First-party journey monetisation
Brands with direct consumer relationships (retail, travel, hospitality) use AI to surface personalised offers within owned experiences.

Advertising becomes:
Conversational
Conditional
Outcome-driven

The ad unit is no longer a format.
It is a decision.

What This Means for Brands

In this environment, brand success depends on three capabilities:

AI readability
Can an AI system understand what you offer, where you are available, and why you matter?

Contextual relevance
Can your brand add value in a specific moment, not just broadly?

Trustworthiness
Will consumers accept your presence when mediated by AI?

Brands must design for machine understanding, not just human persuasion.

The strongest brands will not speak more often — they will be chosen more often.

What This Means for Agencies

This shift redefines the role of agencies.

Agencies evolve from buying inventory to orchestrating decisions

Their new responsibilities include:

- Mapping signal-rich moments across journeys
- Optimising brands for organic AI inclusion
- Designing sponsored intersections that feel natural
- Balancing commercial impact with consumer trust
- Measuring influence, not impressions

Media planning becomes conversation planning.

Media buying becomes signal strategy. Agencies that master this will remain indispensable.

Conclusion

Trust Is the Performance Constraint

This system only scales if trust is preserved.

Consumers will tolerate:

- Helpful suggestions
- Relevant recommendations
- Transparent sponsorship

They will reject:

- Excessive frequency
- Poor timing
- Irrelevant intrusion

In AI-mediated environments, misuse is punished instantly — not by regulation, but by abandonment.

Trust is no longer a compliance requirement. It is a performance driver.

The next era of media will not be shaped by reach, frequency or formats, but by the ability to influence decisions at the moments that matter most. Brands will increasingly compete not to be seen, but to be recommended, chosen and trusted, while agencies will differentiate through their ability to interpret signals, orchestrate relevance and protect the consumer experience.

CES makes this shift unmistakably clear:

Media is no longer something brands simply place into the world; it is something AI introduces into people's lives—selectively, contextually and only when it truly matters.