Be at the table or on the menu!

The AI imperative in audience measurement

An opinion piece brought to you by

asi | KITSUNE Audiences & Data Consulting

Scan the QR code to watch the presentation recorded
in Copenhagen at the 2025 asi International Conferences.

about asi
Since 1991 asi has been organising international conferences on key developments in media and advertising, with a particular emphasis on audience measurement. Over the years these events have secured a global reputation for independent, highly relevant and informative agendas. With conferences held annually, asi has established a global community with delegates regularly attending and sharing approaches to resolving common industry challenges.

www.asiconferences.com

Published by asi
February 2026

Lessons from the past: learning from the internet chaos

Introduction

The rise of internet advertising offers a cautionary tale for the measurement industry.

Fraud and opacity spiraled as online technological innovation outpaced the industry's ability to safeguard quality and accountability. VASTFLUX alone – a massive digital ad fraud case – cost billions and damaged trust in online measurement. My friend Byron John (DStv Media Sales), through his exceptional outline 'Ghosts in the Machine', captures this stark warning perfectly: unchecked enthusiasm for technology inevitably leads to disaster when guardrails are absent. In September 2025 I had the privilege of discussing these themes in depth with Byron, and sought to further explore how his insights apply directly to AI's emergence in audience measurement.

AI's arrival in audience measurement is not another technology cycle – it is a generational change.

Unprecedented speed, scope and impact demand that every organization confronts new risks and opportunities simultaneously. The complexity AI introduces into our systems becomes visible in ways that make us uncomfortable. The critical question is whether the industry will harness AI meaningfully and adopt proper safeguards, or whether it will facilitate the same mistakes to a much greater extent.

Ahead of the 2025 asi International Conferences in Copenhagen, I had the opportunity to discuss this topic with practitioners from some of the largest research suppliers.

They included:

- Uday Chitragar, GfK-NIQ
- Pete Doe, Nielsen
- Hugh Reid, Kantar Media
- Jerome Schalkwijk, Ipsos
- Daniel Wong-Chi-Man, Ipsos

Thanks also to the asi team for their review and suggested edits - always helpful for a non-native English writer.

The pages that follow summarise my key take-outs from the collective insights, which I've sought to build upon with my own perspective. The paper outlines my views, not *per se* the views of the people (nor their respective companies) I had the pleasure of talking to. Now is the time to consider where the industry must go to maintain relevance in the near-term future. The AI imperative for audience measurement is clear in my opinion: be at the table or be on the menu!

I would welcome your comments and opinions – get in touch, and let's establish an industry dialogue.

Bas De Vos
Chief Kitsune
Kitsune Audiences Data & Consulting
bas@kitsuneconsulting.org

1. The industry at a crossroads

Inertia, contracts and urgent change

Audience measurement has long anchored itself in institutional stability. Long-term contracts across the world, many overseen by established Joint Industry Currencies (JICs), maintain established supplier relationships with continuity and predictability.

Yet this very structure now presents a vulnerability.

The tension is real and immediate. Long-term contracts lock organizations and the industry into existing methodologies and slow the pace of change. Suppliers face few incentives to innovate at scale when existing relationships ensure predictable revenue streams.

When new solutions require contract renewals or new tender processes, adoption becomes bureaucratic and slow. Meanwhile, clients increasingly expect cloud-native, instant solutions – not incremental refinements.

‘Technology moves faster than industry committees ever could.’

Technology moves faster than industry committees ever could. Even while teams troubleshoot yesterday’s data problems, the measurement landscape shifts around them. Estimates find operations now consume 80% of research project effort and, without significant changes over the next three to five years, measurement providers risk becoming irrelevant as competitors move faster.

Yet there is a path forward. Rather than seeing stability and transformation as opposing forces, the industry can reorient structures, contracts and partnerships through JICs and similar bodies to actively enable innovation while maintaining daily operations. The frameworks that once preserved continuity can become the safest routes to modernization if incentives are redesigned and processes are reimagined.

The question is not whether change must happen – it’s how to make change safe, systematic and collective rather than chaotic and fragmentary.

2. Speed and innovation

Outpacing the market

AI-driven innovation cycles are compressing timelines beyond recognition as they are happening in months now, not years. Those who wait may discover too late that demand and technology have moved on.

Amongst the research providers I interviewed some have successfully prototyped new panels and hybrid models in weeks, whereas similar efforts just a few years ago would have taken more than 12 months. The ecosystem we service demands publicly visible experimentation and iterative learning, not perfect consensus. Speed does not excuse mistakes, but fear of speed is lethal. Learning in the open – failing visibly and adapting quickly – is surely more effective than waiting for certainty.

This creates a profound tension.

New methodologies require validation, and stakeholders demand reassurance. Yet with these end-user expectations shifting, no one can afford to stand still. Rapid change is becoming a pre-condition to survival.

The requirement to build organizational muscle for rapid, visible experimentation while preserving the robustness that stakeholders demand is clear. If innovation cycles are to be measured in weeks but trust is earned over years, how do suppliers and clients design ways of working where moving fast is not reckless, but the most responsible path to keeping measurement techniques aligned with how audiences live and consume media?

‘Rapid change is becoming a pre-condition to survival.’

We must be ready for rapid change – suppliers, clients and the audience being measured.

Innovation requires new governance frameworks that allow for managed trend breaks while maintaining methodological rigour. Small statistical shifts, for example 0.1% reach changes, are inevitable when methodologies improve – they are not grounds for rejection.

3. Efficiency

Beyond hype, towards productivity

Whilst the allure of efficiency is strong, the reality is more complex.

Automation promises welcome relief for cost centers including panel recruitment, operations, quality assurance and control, but these may also bring new challenges that often go unnoticed.

A naive outlook assumes that panel management and operations can be fully automated at near-zero cost, but this is far from reality. One of my interviewees shared how, when they automated panel maintenance to reduce costs, whilst the margin improved it also introduced errors never anticipated before. The difference between productive and destructive efficiency matters enormously. Productive efficiency frees research teams for higher-value, creative work. Destructive efficiency reduces headcount and hopes artificial intelligence will magically fill the methodological gaps, leading to lower data quality and new vulnerabilities.

‘The difference between productive and destructive efficiency matters.’

Others I spoke to shared concern with a persistent myth that artificial intelligence transformation is inexpensive. Using ChatGPT on a free subscription or a €10 monthly plan creates a dangerous misconception that AI savings should be immediate and dramatic. Enterprise deployment of AI is entirely different; building proprietary APIs, developing domain-specific language models, setting up computational infrastructure and establishing governance systems requires substantial investment. Efficiency must be earned, and robust, proprietary AI usually costs more upfront, not less.

Without investment in proper systems and oversight, quality falters and risks multiply.

The most cost-effective path is not the one that deploys AI fastest, but the one that builds AI capability intentionally and sustainably.

4. The quality dilemma

Improved products, meaningless outputs

AI amplifies scale and speed, but it also amplifies existing flaws and biases.

You can deploy the most sophisticated AI system imaginable but, if inputs are poor and unrepresentative, the outputs are meaningless and misleading.

As technology democratizes data access, the risk of (as one interviewee put it) 'bullshit data' grows stronger. When every tool offers data, the industry begins trusting data that is meaningless, and noise becomes truth. This is not a minor concern but a fundamental threat to credibility, trust and reputation.

Real-world examples beyond the measurement industry illustrate the problem. Deepfake videos create public confusion, automated metrics report near-perfect participation rates and audits reveal automation errors. Measurement suppliers must choose their role carefully. AI is a tool, albeit a powerful one, but it is only a tool, an enabler. Many I spoke to urge caution and stress that the industry must resist the temptation to empower only AI-driven approaches while forgetting traditional disciplines: mathematics, statistics and sound research principles.

For example, one supplier who tried automating panel maintenance learned this lesson directly. Cost reductions were evident, but unexpected errors emerged. The solution was not more automation, but disciplined oversight alongside automation.

'Guardrails are not optional.'

Guardrails are not optional – they are ethical, operational and require continuous vigilance.

Data quality and research rigour remain essential – without them impressive dashboards and outputs become dangerous.

5. Standards, not standardisation

A renewed imperative

The use of AI in audience measurement requires a stronger, more explicit emphasis on research standards, more so than ever before.

Having participated in recent forums, the discussions about research standards are largely insular. Attendees generally agree on their importance, but these discussions rarely reach those looking to introduce new research solutions. Even in formal research papers, basic information is routinely omitted: when was the sample collected; what was the sample size? These are foundational questions.

When AI enters the picture, these standards become critical – something flagged and discussed by some of my interviewees.

Organizations must enforce disclosure of input data, sample timing and size, training data, model type and data access restrictions. These are not advanced or complex requirements – they are research fundamentals applied to new contexts. Yet enforcing standards creates friction, since applying standards slows down rapid iteration. In an environment where speed is prized and everyone wants to move faster, guardrails feel like obstacles. Yet they are the only way to ensure that mistakes do not become disasters, a conclusion strongly endorsed by some of the people I spoke with.

‘Enforcement is hard, but the cost of failure is far greater.’

Organizations must consider building proprietary systems, restricting open-data interfaces where necessary and investing in continuous upskilling of their teams. Training is fundamental, both for deployment and for enforcing guardrails. What many often forget is that setting up AI systems at scale comes at significant cost. Private APIs, proprietary language models and computational power all require investment.

Enforcement is hard. The cost of failure, whether through privacy breaches, data misrepresentation or loss of trust and reputation, is far greater and, I believe, is recognised by the industry.

6. Renewed vulnerabilities

AI and audience measurement

AI within measurement systems introduces new vulnerabilities.

Amongst those I spoke to, privacy and data exposure risks remain foremost concerns. AI does indeed bring renewed risk of data disclosure, and the identification of individual panel members by deconstructing panel data is a task AI makes easier than ever before.

Preventing such a scenario with guardrails that are simultaneously technical, operational and cultural is challenging. Technical guardrails control system behaviour. Operational guardrails structure how humans use systems and what they access. Cultural guardrails create norms and expectations around responsible use.

Yet structural obstacles to deploying these safeguards remain real – they slow organizations down at a time when everyone urgently wants to accelerate. This creates an inevitable tension – do we skip them, minimize them, or defer them? Yet they are the only mechanism to ensure mistakes do not become disasters.

Investment needs to be substantial. Those who wish to leverage AI systems securely must invest to ensure data access controls, will also need to manage operational infrastructure and continually train teams on safe use. This inevitably comes at a cost. Unlike open tools, proprietary systems require sustained investment.

The payoff is clear in avoiding the catastrophic costs of privacy breaches, data misrepresentation and loss of trust.

‘Privacy and data exposure risks remain foremost concerns.’

7. Diverging paths

Future scenarios

The future presents two directions and organizations must choose which path they take.

Some organizations will embrace AI transformation in a deliberate manner, pairing speed with quality and accountability. They will build agentic workflows, where AI handles routine tasks under human oversight, freeing talent for complex decisions. These organizations will maintain a genuine reason for existence providing credible, representative insights.

Others will hold onto tradition until it is too late, losing ground incrementally to competitors. Or, conversely, some will dive headfirst into AI, abandoning the rigour and expertise that gave them credibility. Without sound methodology, they will have no competitive advantage. Without respecting traditional values, they will struggle to validate new approaches.

There is also a question of segmentation. Some clients may need only the '80% picture' where Pareto logic applies and targeting the broad market semi-accurately will suffice. Others will demand deeper insight into the 20%, understanding where emerging audiences are and where they are headed. These diverging client needs may require diverging supplier strategies.

'Diverging client needs may require diverging supplier strategies.'

Without bold experimentation, continuous learning and renewal of traditional research expertise, many organizations will be left behind. Within five to ten years, some companies may not exist – not because AI disrupted them suddenly, but because they failed to embrace it.

8. A double-sided coin

Efficiency and innovation

AI can be deployed in two distinct ways: internal optimization and external innovation. The industry has focused heavily on the first but must balance this with the second.

Internal AI applications optimize existing processes. Smart automation reduces costs, speeds cycle times, and improves accuracy in routine tasks. This is financial hygiene – necessary, valuable, but not transformative alone.

External AI applications create entirely new products and insights. AI can generate new understanding from existing data, power predictive tools that clients did not know they needed, and build smarter interfaces for accessing insights. This is where measurement vendors can differentiate and create new value.

Both dimensions matter. Efficiency keeps organizations viable whilst innovation keeps them relevant.

Be at the table or be on the menu!

Concluding thoughts

The interviews conducted paint a stark picture and the choice for every measurement organization is clear: be at the table or be on the menu.

I firmly believe that those who engage fully with AI transformation – combining innovation with rigorous guardrails whilst investing in new capabilities and preserving core expertise – will shape the future. Those that do not will be shaped by others – acquired, displaced or made obsolete.

Human expertise, research instinct and traditional research skills have never been more vital. You cannot steer if you are not in the driver's seat! Context and intuition allow measurement practitioners to continually challenge whether outputs look right or wrong, whether a finding makes sense or signals a methodological problem. Without this capacity I believe we simply invent new problems rather than solve existing ones.

The societal dimension should not be overlooked. The industry must train the next generation of measurement professionals to understand both AI and established research disciplines to build basic understanding that enables sound judgement and accountability.

The time for deliberation is over. Audience measurement must take bold, urgent steps: embrace rapid innovation, establish intentional guardrails, renew human skills and expertise, and shape the industry rather than be shaped by it. The alternative is to be on the menu.