

CREATING ADVANTAGE IN AN UNCERTAIN WORLD

Key global trends and
opportunities to shape your
strategy for the coming year

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INTRODUCTION

As much as we may wish the opposite were true, we live in an uncertain and rapidly changing world, politically, economically, environmentally and technologically. For most organisations standing still is rarely an option.

Whilst businesses face more risk than ever, from geo-political tensions to advancing technology, there are also opportunities to be grasped and, to meet both, the need for strategic and effective communication and policy engagement has arguably never been greater.

Grayling's annual global trends report aims to reduce uncertainty for business leaders and executives by spotlighting the themes and developments that will likely frame the year ahead.

We trust that by sharing unique insights from our international teams and associates, we will help our clients—wherever they are in the world—not only to meet these challenges head-on but to create opportunities and create advantage.

In politics, we examine the return of Donald Trump to the White House and the new EU mandate and its implications for geopolitics, global security, and international trade.

We also explore how ambitious energy reforms present both challenges and opportunities for businesses and brands to enhance political engagement and reach new audiences.

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The march of artificial intelligence (AI) is set to have a profound impact on daily life. From healthcare to transport and communications, AI's reach will be transformative, and 2025 could mark a tipping point. As early iterations of AI mature, businesses that have been cautious in their adoption of the technology will need to commit more fully. We delve into the potential risks, pitfalls and upsides.

We also consider the fast-evolving landscape of social media and how brands and businesses can stay ahead of the curve.

Consumers are more discerning than ever, and trusted content has never been more highly prized, driven by younger generations who are shaping a new media age.

In short, understanding our audiences and how best to reach them is crucial—failure to do so could prove costly.

Thank you for reading. We welcome your reflections and suggestions on any of the topics covered in this report, as well as your thoughts on preparing for 2025 and beyond.

Richard Jukes
Global CEO, Grayling



CRISIS AND CORPORATE RISK

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The global risk landscape is more complex than ever, shaped by an intricate web of geopolitical conflicts and regional instabilities amidst economic upheaval and international tensions. The Russia-Ukraine conflict, ongoing wars in the Middle East, and the ever-present tension between North and South Korea are among the significant challenges facing governments and multinational organisations. Alongside these, other risks such as terrorism, cross-border crime, and natural disasters driven by climate change demand that companies plan ahead, remain vigilant, and stay prepared.

Uncertainty is unavoidable in business, but 2025 is likely to present a range of diverse threats to global trade, amid shifting political landscapes, geopolitical tensions and the rapid evolution of technology.

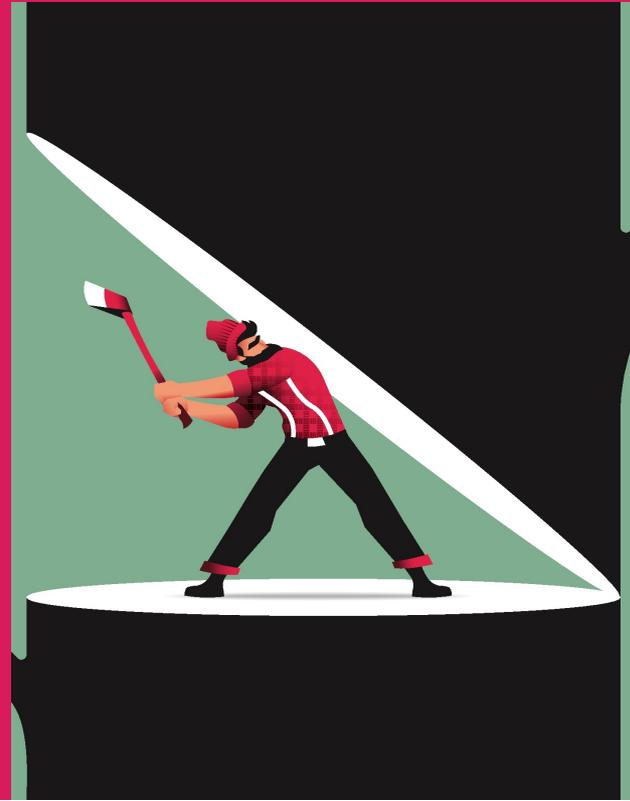
The potential for bad news—even fake news—to escalate rapidly into a crisis in the glare of heightened public scrutiny adds another layer of risk. Companies must navigate these shifting sands while maintaining their reputation and freedom to operate.

AI promises many benefits. However, it also has the potential to inflict enormous damage. Fake news has taken root in the social media age, where AI can be hijacked to manipulate images and audio, amplifying its impact.

Research suggests that cybersecurity remains the top risk for businesses, followed closely by digital disruption including AI¹. With nearly half of businesses globally reporting incidents of deepfake fraud by 2024² we believe that strategic planning to mitigate such threats must be considered a business-critical priority.

The ability to pro-actively manage some of these challenges will also be crucial in enabling companies to turn threats into opportunities.

At Grayling, we understand that protecting reputation is vital. In 2025, we counsel clients to proactively identify, analyse, and assess the wide range of risks they will—not might—face. Above all, speed and agility in protecting reputation through corporate communications and risk management are more critical than ever.



KEY TAKEAWAYS

EXPERT VIEW

“2025 could be the year that an organisation finds itself in a crisis despite having done nothing wrong. Fake news wears many masks, and AI is developing faster than anyone can keep up with. If you can't act extremely quickly and effectively, the damage could be severe. The media are still capable of a 'publish and be damned' approach, which means getting ahead of a crisis is as much about speed as it is about rhetoric. If you do only one thing this year, make sure you rehearse acting with speed—not just as a communications team but as an entire leadership team. The consequences of dawdling don't bear thinking about.”

Billy Partridge, Board Director, Grayling



01

Position your business as a leader in AI:

Share clear, actionable steps that your organisation is taking to adopt, integrate or innovate with AI.

Transparency and accountability must remain the guiding principles. Businesses must be mindful of AI's limitations and the ethical implications of its use, particularly in areas such as data privacy and bias.

02

Strengthen Internal Communications:

Build a resilient culture centred on employee well-being and trust. Open dialogue and feedback help identify potential issues early and foster a sense of ownership among employees.

03

Prioritise Agility and Speed in Crisis Management:

Implement real-time monitoring systems to detect and respond to issues as they arise, including social media monitoring and sentiment analysis.

Develop and update scenario planning to anticipate internal and external risks. This will ensure that a dedicated crisis response team can act swiftly and decisively.

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C-SUITE PRIORITIES

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If 2024 was the year of elections, then 2025 is perhaps the year of expectations. Can new leaders deliver on their promises? What might the repercussions be?

Businesses should expect greater instability in the year ahead, as geopolitics, conflicts, and disruptions to international trade pose significant global challenges.

In fact, about a third of businesses regard political instability as the biggest risk they face this year.³ Business leaders, then, will need to focus on issues that are within their control, such as navigating the regulatory landscape, building brand awareness, or protecting their reputation.

From a communications perspective, it means having a strategy in place for the worst-case scenarios and delivering transparent and authentic communications that connect with audiences in a meaningful way. This also applies to your internal comms.

Environmental, social, and governance (ESG) pose further challenges for businesses, with regulatory changes, evolving

stakeholder expectations, and technological advancements driving transformation across industries.

And then—of course—there is AI. The global generative AI market is predicted to grow annually by \$16 billion⁴ this decade, yet many companies are wary of the technology and unsure of how to use and monetise it.

As we head into 2025 and what promises to be a defining year for the technology, businesses will have to keep up—sitting on the fence will no longer be an option.

The good news? For many organisations, communications already have ‘a seat at the table’, playing a key role in business decision-making, while also helping to navigate enterprise challenges that go far beyond the ‘traditional’ communications function.

And rightly so. If 2025 is about expectations, managing them effectively through a carefully considered communications strategy will help protect reputations and offer stability in uncertain times.



KEY TAKEAWAYS

EXPERT VIEW

“In uncertain times, leaders would do well to remember that strong communication provides certainty and clarity, which are key factors in risk prevention. Skills shortages remain a significant issue, despite rising unemployment in some markets, making internal communication even more important. Honesty and action, rather than words, are key.”

Sigrid Krupica, CEO, Grayling DACH



01

Master Expectation Management:

Align communications to pre-empt and manage expectations from shareholders, customers, and consumers.

Be transparent about challenges and proactive in showcasing progress to build trust.

02

Navigate Risk with Confidence:

Develop a comms strategy that addresses geopolitical, economic, and regulatory risks.

Demonstrate preparedness and resilience through clear messaging on how your business mitigates uncertainty.

03

Prioritise Proactive ESG

Storytelling: As ESG evolves, emphasise measurable progress and adaptation to new regulations.

Authenticity in your ESG narrative can differentiate you from competitors.

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DIGITAL AND SOCIAL

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The use of generative AI to create social content at scale will become a baseline expectation as the technology becomes increasingly embedded in company strategies and workflows.

The battle between X, BlueSky, and Threads to attract and retain followers will continue. Yet, many businesses and brands remain wedded to the “Big Five”. However, by playing it safe and targeting demographics, brands restrict the content formats they can experiment with and potentially limit their audience.

It’s easy to stereotype generational preferences—imagine only Baby Boomers on Facebook or Gen Z on TikTok—but the data tells a more nuanced story.

For instance, while older demographics often gravitate towards more established social networks, 55+ is the fastest-growing age group on TikTok, challenging the notion that short-form video platforms are exclusively for younger audiences.

Snapchat, Reddit, and Pinterest collectively boast an estimated 2.5 billion active monthly users.

Meanwhile, once “emerging” platforms, or even established ones like X, can fade quickly, highlighting just how fluid and unpredictable the social landscape can be.

Businesses and brands need to be aware that social algorithms rewarding entertaining and informative content are once again in vogue. This shift has been hugely influenced by the rise of TikTok and its For-You-Page (FYP) format. Meta’s Threads had already reached 275 million monthly active users after 16 months.⁵

The business landscape is expected to feel the effects of the EU’s efforts to enhance the social media environment, from combating foreign interference to initiating an EU-wide inquiry into the broader impact of social media on well-being.

This evolution presents an opportunity for brands to “get granular” and focus their social media marketing efforts on the platforms that truly matter. Brands can then connect with audiences on an emotional and cultural level—a hallmark of digital in 2025.



KEY TAKEAWAYS

EXPERT VIEW

“The proliferation of new platforms means we must continually reassess where our target consumers spend their time and what types of content they engage with. This is not one-size-fits-all, but the rewards for embracing social media far outweigh the perceived risks.”

Adrian Elliot, Head of Digital, Grayling Spain



01

Understand and align with your audience: A data-driven approach is key to understanding the subcommunities that make up a brand's target audience.

Avoid making assumptions about what inspires your audience or jumping on random trends to gain traction – users expect authentic and entertaining content from brands and business.

02

Tailor platform strategies to communities: Diversifying platform presence is key to reaching the right communities.

Brands need to establish whom they want to reach and influence at a granular level and select priority platforms where those audiences are active.

03

Inspire action through audience insights: Interest-based targeting can only be achieved by understanding your target audience's social media preferences.

These insights will allow brands to create content that motivates and inspires their target audience to act, ensuring genuine ROI from the content they produce.

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For many organisations that have embraced AI, a boost in workforce productivity has been a welcome benefit, helping to assuage fears that the technology threatens jobs. Even so, amid reports that companies are struggling to integrate the technology due to talent shortages, ensuring the necessary expertise is embedded in-house will be crucial for seamless adoption and integration.

From dynamic content creation to text translation and chatbots, AI is redefining the concept of personalised marketing, laying the foundation for highly targeted and tailored communication strategies.

However, while joining the AI revolution might no longer be a matter of choice, businesses and brands will have to be alert to potential pitfalls.

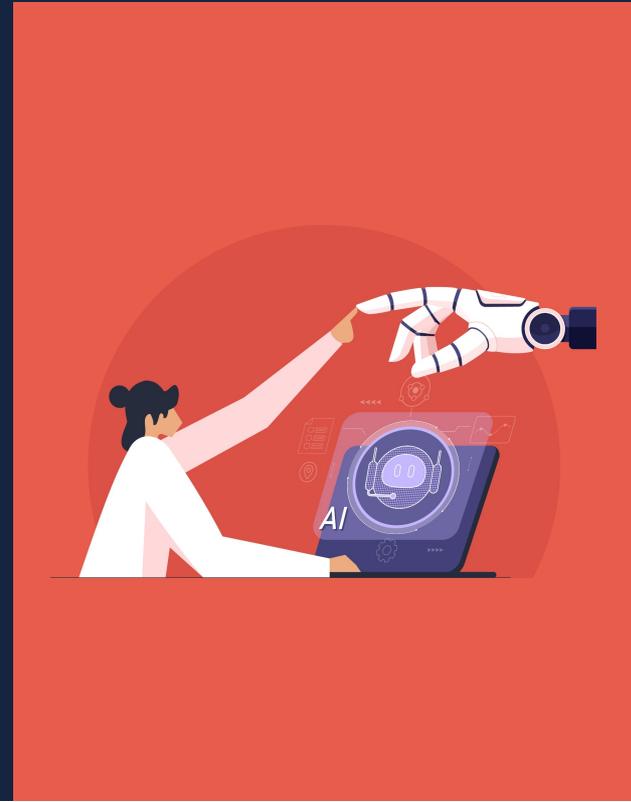
Be aware that data provenance is an emerging theme for 2025, with evidence showing that more than two in five consumers do not trust AI-generated ads⁶. While these are set to become more sophisticated, realistic, and engaging, balancing automation with a human touch will be vital to maintaining authenticity and audience trust.

AI can sift through and harness vast volumes of personal data, but this raises questions about compliance with privacy regulations such as GDPR and CCPA. As the EU defines key policies, effective engagement with its new policymakers will be crucial in shaping regulations and standards.

Brands must manage data strategically to balance utilisation with consumer trust and security, ensuring ethical considerations are central to maintaining their reputation and fostering long-term consumer confidence.

Lastly, but no less importantly, AI-powered search engines are transforming how content is ranked and discovered, challenging brands to adapt their digital presence to evolving algorithms. Staying updated is crucial for maintaining visibility and reach.

Grayling's dedicated AI and Innovation Hub can help leverage this technology—from optimising your digital presence with AI-driven strategies, to harnessing AI platforms and tools, to driving employee adoption and innovation.

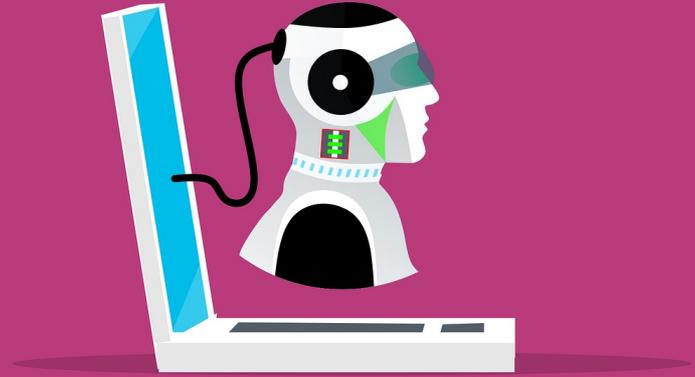


KEY TAKEAWAYS

EXPERT VIEW

“AI excels at processing vast amounts of data, and one of its most impactful applications is in multi-market projects, where understanding the nuances of various countries is essential. While AI has limitations, such as biases and inaccuracies, pairing it with local human expertise enables strategies and campaigns that resonate across borders.”

Lucasz Napora, Creative Director, Graying CEE



01

Adopt a Human-Centric

Approach: While AI offers powerful tools for automation and personalisation, it's essential to keep human values at the core of communications.

Brands should use AI to enhance—not replace—human intelligence and interactions.

02

Leverage AI for Enhanced Personalisation and Analytics:

AI tools offer significant opportunities to gain deeper insights into audience behaviour, allowing for more personalised and effective communications.

Analysing data can help tailor content to meet the specific needs and preferences of distinct audience segments, thereby increasing engagement and loyalty.

03

Prioritise Ethical AI Practices:

Develop guidelines to ensure AI is used responsibly, emphasising transparency, fairness, and respect for user privacy.

Ethical practices build trust and safeguard brand reputation. Implementing robust data protection measures and being transparent about the use of AI in communications will reassure consumers and stakeholders.

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MEDIA

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In 2025, AI will further strengthen its foothold in newsrooms across the world, but technology isn't the only change reshaping the media landscape. With nearly 40 per cent of under-30s turning to influencers for their news⁷, creators are poised to become the new media moguls. At the same time, local news is set for a renaissance, with Australia leading the way through plans to compel big tech companies to pay local publishers for news content.

The first quarter of the 21st century has ushered in a profound period of transformation that has turned the concept of traditional media on its head.

From the rapid rise of media influencers and explosion of social media diversification to the arrival of AI in newsrooms and the decline of traditional media, the way news is curated, delivered, and consumed has dramatically and irrevocably changed.

The scale and pace of this evolution were highlighted in Grayling's latest media trends

report, which signalled a clear and seismic shift towards a new media age—one in which individuality and personal connections are valued over mass media content driven by news organisations.

Younger generations are driving this evolution and the rise of the media influencer as they seek out trusted voices and content across a multitude of platforms and mediums, curating digital spaces that align with their core beliefs and values.

These changes are happening now, in real-time and will continue at pace throughout the year.

The resounding message—one that businesses and brands simply cannot afford to ignore—is to truly understand your audience. Not just what makes them tick but how most effectively to reach them. In this new media age, the Grayling view is that cultivating trusted content and maintaining a loyal audience must be the guiding values for 2025.



KEY TAKEAWAYS

EXPERT VIEW

“It is a time of huge flux in the media. This brings opportunity as well as challenges.

“At a time when audiences are seeking trusted voices and brands, I will continue to have as direct a relationship with my viewers as possible—and use the same voice across all platforms—in a more informal and personalised way.

“I am optimistic about the future of impartial news—but impartial doesn’t have to mean lacking personality.”

Sophy Ridge, Lead Politics Presenter, Sky News



01

Build a trusted media and creator network: Focus on building strong relationships with key journalists and online creators by creating tailored, relevant content that resonates with your audience.

02

Expand your content strategy: Diversify your content beyond traditional channels to reach target audiences across a wider range of platforms, and increase your impact.

03

Strengthen your messaging and leadership voice: Ensure spokespeople and senior leaders have a clear, authentic point of view, to build trust and loyalty with existing consumers while attracting new ones.

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HEALTHCARE

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Global healthcare faces significant pressures, including ageing populations, rising demand, and workforce shortages. However, these challenges present opportunities for innovation, with AI and biotechnology set to revolutionise healthcare delivery. The year ahead promises to be pivotal, with healthcare technology making transformative leaps. Wearable devices will play a vital role in preventing health issues, while virtual care via online platforms is poised to become a cornerstone of the global healthcare landscape.

Rapid advances will improve outcomes, increase longevity, and enhance the overall patient experience. The healthcare industry, an early adopter of AI, is harnessing its power to develop new medicines, streamline diagnostics, and bring treatments to market faster. By 2026, the global AI healthcare market is projected to exceed \$42 billion⁸, driving a shift towards tailored, personalised healthcare and accelerating pharmaceutical research into complex conditions.

Efforts to tackle obesity will remain a priority, with the \$50 billion weight-loss drug market expected to triple. Pharmaceutical giants are set to release innovative obesity treatments, alongside medicines targeting non-communicable diseases (NCDs) such as diabetes and cancer. The World Health Organisation continues to urge global action on NCDs, the leading cause of death and disability, prompting policymakers and media to push for healthier lifestyles and preventative measures.

AI will also transform public relations and patient engagement, enabling more targeted communications to patients and the broader population. Sharing expertise across communication departments offers opportunities to enhance media operations within hospitals and healthcare providers, fostering collaboration and improving information dissemination.



KEY TAKEAWAYS

EXPERT VIEW

“The future of AI holds immense potential for assistive technology (AT) in low- and middle-income countries (LMICs). AI can accelerate the development of essential digital AT building blocks, making technology more accessible and affordable. However, we must address challenges like AI bias and ensure that people with disabilities have access to training and support to fully benefit from these advancements. ATscale is committed to working with partners to unlock the transformative power of AI for people with disabilities, older people and people with vision and hearing impairments in LMICs.”

Ceridwen Johnson, Advocacy and Communications Advisor, ATscale



01

Build strategic political relationships: Take the time to deeply understand key political advocates and build long-term, mutually beneficial relationships.

02

Align messaging with current government priorities: Understand your government’s communication style and priorities, and ensure your messaging aligns seamlessly with their key objectives.

03

Demonstrate commitment through action: Tangible actions have a greater impact than promises, so take concrete steps to align proactively and consistently with the government’s broader policy priorities.

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ENERGY AND ENVIRONMENT

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Climate change and global efforts to address it will take centre stage in 2025. Scientists warn that carbon emissions must peak this year and decline sharply to meet the Paris Agreement's 1.5°C target⁹, but significant challenges remain.

Geopolitical and policy shifts will heavily influence the global energy market. In the US, Trump plans to dismantle Biden's climate initiatives, favouring fossil fuels and potentially withdrawing from the Paris treaty. However, strong business support for green incentives suggests companies should emphasise how green policies align with an "America-first" economic agenda, showcasing how they can drive innovation and economic growth. Close engagement with officials and regulators will be essential to navigate these changes.

In the UK, Labour's government is advancing bold reforms to meet the Clean Power 2030 target and achieve net zero by 2050. Plans to double onshore wind, triple solar power, and quadruple offshore wind will require over 600 miles of new power lines and 3,000 miles of undersea cables¹⁰. While Labour

has the majority to implement these changes, effective coordination with the energy sector and securing public support will be critical to its success.

The EU faces the challenge of balancing energy security with green transition goals. Success depends on member states delivering on ambitious climate initiatives such as electrification, green hydrogen, and energy efficiency. Achieving these objectives requires strong cooperation among member states.

Spain must balance the urgent need for job creation with its climate responsibilities, requiring clear communication strategies that address economic and environmental goals.

In France, political instability and a lack of legislative clarity hinder progress. Without a clear majority in the National Assembly, the country's energy strategy risks fragmentation, leading to piecemeal and inconsistent measures.



KEY TAKEAWAYS

EXPERT VIEW

“We can still see a strong anti-ESG sentiment in election campaigns, but so far it has not impacted real policies. The fate of the US Inflation Reduction Act and the implementation of Draghi’s Report recommendations in the EU will be crucial.

I expect that innovation and research, strengthened by AI, may significantly advance energy use and its production.”

Matej Kovac, Head of Public Affairs, Grayling Slovakia



01

Develop a proactive communications strategy:

The energy debate is likely to become more highly charged as the sacrifices, costs, and challenges attract greater media and public attention – have a comms strategy in place and crystallise the narrative.

02

Stay informed on evolving trends:

Be sure to monitor news output and political conversation across all news channels (think podcasts, which are now a mainstream source of media consumption) to track and keep abreast of trends.

03

Advocate for planning reforms:

Continue to make the case for meaningful planning reforms and, where possible, continue to provide politicians with the arguments to combat opposition.

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PUBLIC AFFAIRS AND GOVERNMENT RELATIONS

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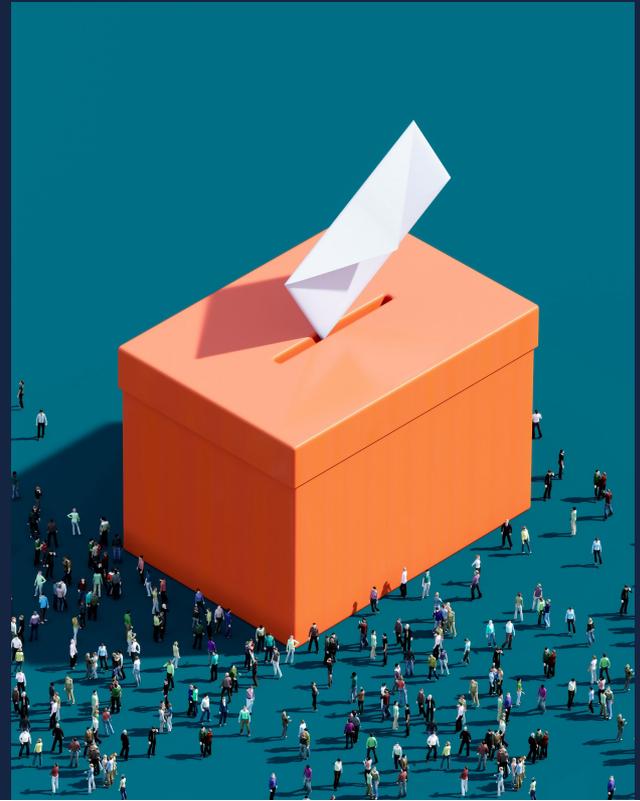
2025 is the year of delivery. New administrations need to make good on pre-election promises and demonstrate their licence to govern.

In the US, the return of Donald Trump to the White House – marked by a blizzard of executive orders on climate, energy, illegal immigration, free speech, and TikTok—will have global repercussions.

Meanwhile, political trends in Central and Eastern Europe (CEE) reflect a complex interaction of security concerns, shifting geopolitical dynamics and the rise of right-wing parties in countries where issues such as national sovereignty, economic disparities, and migration are at the fore.

Trump's return to office has amplified calls for increased NATO burden-sharing, placing additional pressure on CEE countries to enhance their defence capabilities amid ongoing tensions with Russia.

Amid the turmoil, political engagement has never been more crucial. Newly incumbent ministers are open to fresh ideas but gaining their ear in a crowded political arena is not likely to be easy. Organisations will need to work harder, smarter and more efficiently to ensure their messages gain traction. Ensure you have your playbook ready to ensure agility when it comes to key policy developments.



PUBLIC AFFAIRS REGIONAL EXPERT VIEWS

USA

“With Republican control of all three branches of government, businesses are preparing for significant policy shifts—deregulation, tax cuts, and trade reform. However, governance rarely mirrors campaign rhetoric entirely.

Checks and balances, legislative roadblocks, and bureaucratic inertia mean uncertainty will persist. Therefore, businesses must adopt a dual strategy: engaging lawmakers proactively on anticipated changes while remaining adaptable and crafting messages that align with stakeholder and societal expectations.”

Daniel Strauss
Managing Director New York
Grayling US

DACH

“The economic recession in Austria and Germany, combined with Switzerland's modest economic outlook, places significant pressure on political decision-makers in the DACH region, potentially limiting opportunities for companies to make their voices heard.

This is particularly true for Germany, where the new appointment to the Ministry of Economic Affairs is likely to significantly impact how many associations and companies engage with the Ministry under a new government, expected to be a coalition of the Conservative party with either the Social Democrats or the Greens.”

Christian Dingler
Director Corporate Affairs
Grayling DACH

FRANCE

“France is currently experiencing an unprecedented period of political instability at the national level, placing our clients in an uncertain context.

Rather than leading to stagnation, this situation encourages us to redeploy our resources and networks towards different levels of public decision-making, notably the central administration and the territories, which are equally influential. This strategic reorientation allows us to capitalize on new opportunities emerging in this complex landscape.”

Angeline Charbonnier
Public Affairs Director
Grayling France

KEY TAKEAWAYS

EXPERT VIEW

"With the ambitious agenda of the new European Commission, businesses and industries will face significant challenges as they navigate a fast-evolving regulatory landscape. From a Clean Industrial Deal, to increased scrutiny on supply chains, to the promise of smart regulation, to a new Single Market strategy - the first 100 days are expected to set the tone for a decisive policy push. The ability of businesses to clearly define and communicate their policy asks will be crucial for the future of their businesses not only in Europe but also globally given the EU aims to set the tone globally on it's approach to markets. Staying ahead of these developments will be critical—Companies will need to engage early, track emerging policies closely, and be ready to adapt to new frameworks as they emerge. Success in the coming years will hinge on a proactive approach to public affairs."

Jessica Brobald, Managing Director, Grayling Belgium



01

Build strategic political relationships: Take the time to get under the skin of key political advocates and build meaningful relationships.

02

Align messaging with current government priorities: Understand the language of your government and ensure your messaging reflects their key priorities.

03

Demonstrate commitment through action: Actions often speak louder than words, so take meaningful steps to show alignment with the government's broader policy priorities wherever possible.



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CONCLUSION

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From a business perspective, a clear theme for 2025 is one of heightened global instability.

The ongoing conflict between Russia and Ukraine, tensions in the Middle East, cyberterrorism, political upheaval, and potential trade wars—each combining to create uncertainty, which in turn can breed anxiety and pessimism.

The risks, of course, do not end there. As we look ahead to a year that promises rapid changes across technology, social media, and the way we communicate with each other, businesses and brands will need to keep pace or risk losing their competitive edge.

The rise of artificial intelligence is a dominant feature of this report, and necessarily so.

The technology is poised to impact our lives more than perhaps any other, and while the benefits are not in doubt, we must tread carefully and remain mindful of the risks as AI adoption expands. Bad actors are always ready to exploit new technologies, and as the trend in fake news demonstrates, PR and communications teams need to be prepared.

However, there are good reasons for optimism. The changing media

landscape, coupled with advances in artificial intelligence, presents new opportunities for brands and businesses to connect with more people—and potential customers—than ever before. The challenge lies in understanding these shifts and how they can be navigated to create advantage.

Whatever your aims and goals for 2025, success will invariably depend on acknowledging uncertainties and having a clear and transparent strategy that aligns with your core values. This will be true for both external and internal communications.

Received wisdom holds that in times of uncertainty, companies that can communicate their strategic priorities and demonstrate progress will have stronger brand reputations than those that do not.

At Grayling, we understand the importance of a steady hand on the tiller and take immense pride in knowing that as we look ahead to 2025, clients old and new will rely on our expertise to help them reach the audiences that matter with messages that work.

Thank you for reading—and whether it be corporate communications, public affairs, crisis management, creative services, or content production, do not hesitate to get in touch for support

Grayling is the world's local communications agency. With 30 offices around the world, it has the reach, influence and infrastructure of a global agency, with the creativity, connections and cultural know-how of a boutique. Combining a breadth of expertise across consumer, corporate, public affairs, digital and creative services, with proprietary technologies and an inclusive culture, Grayling develops and delivers award-winning communications campaigns that create advantage for its clients.

Grayling is part of Accordience, alongside Citigate Dewe Rogerson, Red, Circle and Momentum. Find out more at www.grayling.com.

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CONTRIBUTORS

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Grayling Contributors

Richard Jukes, Global CEO

Tanya Joseph, Senior Counsel

Leah Selouk, Head of Corporate

Romilly Dennys, Head of Media

Sigrid Krupica, CEO DACH

Billy Partridge, UK Board Director

Ali Chandler, Digital Account Director

Ella Higgins, Head of Strategy

Adrian Elliot, Head of Digital, Spain

Nathan Kemp, Chief Innovation Officer

Joe Cawley, Head of Planning & Infrastructure

Matej Kovac, Head of Public Affairs, Slovakia

Alan Boyd-Hall, Head of Public Affairs, UK

Jessica Brobald, Managing Director, Belgium

Danny Strauss, Managing Director, New York

Christian Dinger, Director of Corporate Affairs DACH

Angeline Charbonnier, Public Affairs Director, France

Designed by [Humble Mavericks](#)

External Contributors

Neil Kleiner, Managing Director, Movement

Sophy Ridge, Lead Politics Presenter, Sky News

Ceridwen Johnson, Advocacy and Communications Advisor, ATscale

Mark Macaskill, Skilled Media

OnePoll / 72Point

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