2025

Advertising Outlook Report

Key insights on consumer, advertising, and media trends with data gathered from nearly 700 leading marketing industry professionals.

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TechValidate
by SurveyMonkey

Table of contents

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Introduction

Thank you for reading Mediaocean's 2025 Advertising Outlook Report. These insights reflect input from nearly 700 marketing professionals, focused on key consumer and technology trends along with 2025 H1 projected media investments.

We primarily surveyed marketers and agencies, but also included perspectives from media companies, measurement firms, tech platforms, and other industry cohorts. This is the seventh in our series of bi-annual market reports, with the first published at the end of 2021. The most recent data points used in this research are based on surveys conducted in November 2024.
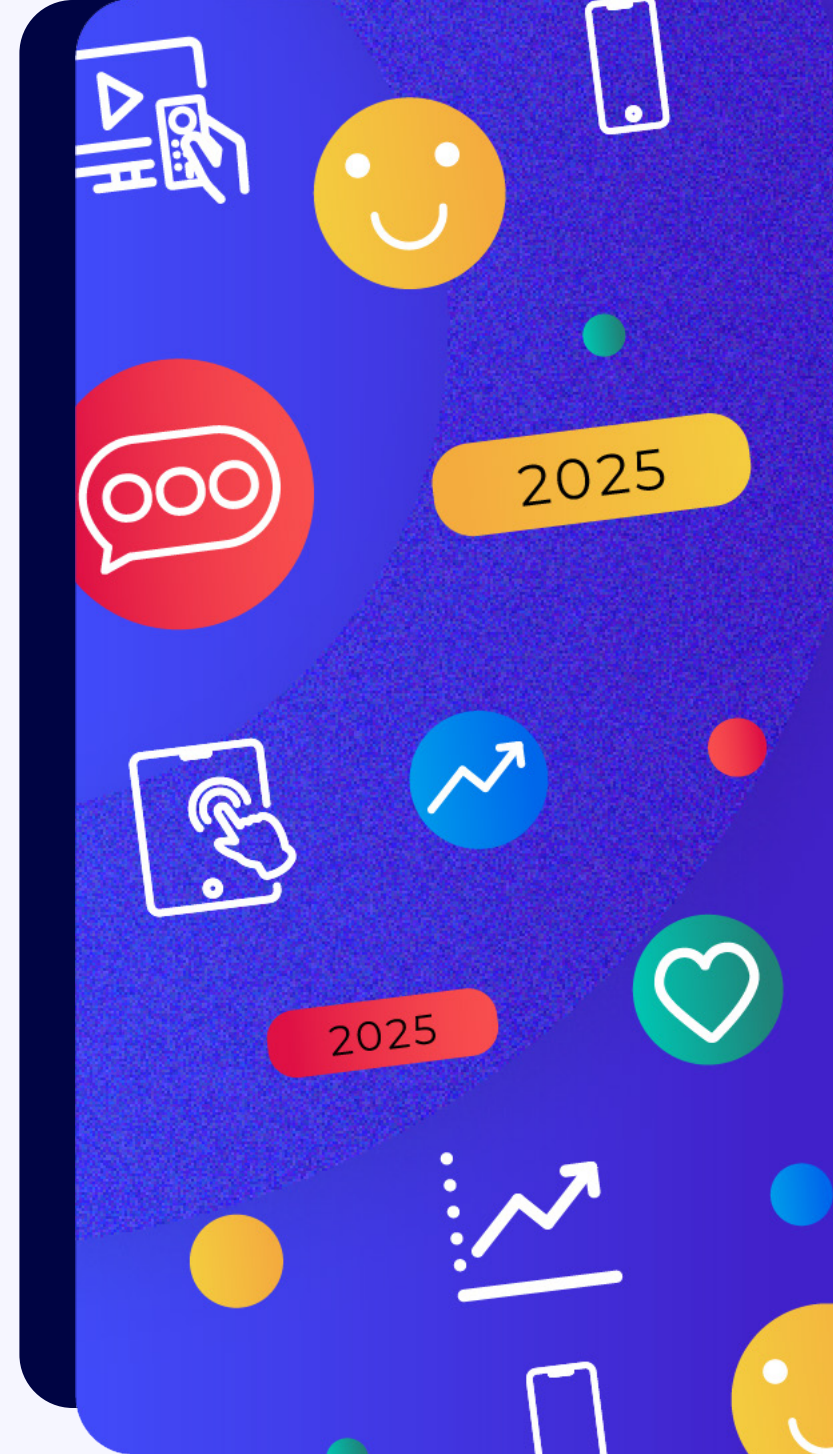
Foreword

We often look at the world and the overall advertising industry, mindful that its ever-changing mix of different marketers, and focus on what will happen rather than what should happen. Surveys of groups of marketers often tend towards the should and can't typically capture the fact that the evolution of an economy means that many new kinds of marketers emerge, further limiting the visibility that surveys can provide.

With that noted, we find ourselves in strong agreement with most of the observations raised by the survey underpinning the Mediaocean 2025 Advertising Outlook Report and further agree that these are among the most important trends set to impact marketers this year. The results generally weave together very clearly.

With individual practitioners increasingly incentivized towards shorter-term sales-like KPIs (in part because newer media channels and tools make it possible to measure them relatively quickly), it's natural that performance-driven media would become a most critical capability. Because most platforms providing these performance-driven solutions are digital, it's then understandable that digital channels would outpace those which are not digital.

With the massive expansion of workflows that follows from the ongoing growth of digital channels, the need for automation—and thus AI—trumps CTV in importance. And then, given the aforementioned performance focus and all of the challenges that go with quantifying performance, it more than makes sense that high-quality measurement would similarly become more important than it ever was.

Of course, there are some problems underpinning much of this focus along with some under-realized opportunities, too. To start, the use of performance media as practiced by many marketers comes at the expense of prioritizing brand-building. Those who truly want to use performance media probably should consider direct mail, although because it's not "digital" physical mail usually doesn't wind up on a media plan.

For a similarly mixed trend, the key factor driving adoption of AI is an ongoing need for efficiency—which is a laudable objective—but the ways in which efficiencies are realized often causes marketers to focus on individual functions rather than whole systems.

Put differently, there is a tendency among many large marketers to prioritize the short-term growth of their proverbial trees rather than manage the long-term health of their much bigger forests. That's illustrated largely in the creative-media gap—both wide and meaningful—which probably should not exist at all. If marketers that better creative and better ideas drive better media performance, why are they not more tightly integrated?

If there's one important topic we think that advertisers appear to underestimate (by virtue of its low ranking among consumer trends), it's the potential for political and advocacy issues to meaningfully impact everything else this year. There are some positives to consider, but probably more negatives overall.

As examples, for all marketers a ban on TikTok in the US will probably alter which social media vehicles US-based brands will work with. Tariffs and deportations will alter prices and competitive dynamics within categories and probably impact supply chains, too. These factors will impact the choices that all marketers need to make in 2025. And then there are considerations for the pharmaceutical industry, which may face more targeted regulations and the dynamics of negative consumer sentiment towards that business, healthcare and many other industries.

At an industry level, 2025 will be a year of tremendous uncertainty for all of these reasons and more, although many individual marketers will still find ways to adapt and thrive. Tactics and strategies described in this report will undoubtedly be critical elements behind those outcomes.

Brian Wieser
Principal
Madison and Wall

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Ad spending: Marketers continue to prioritize digital channels

To make informed decisions, marketers need a clear understanding of the broader trends shaping advertising spending. Our research indicates that the industry's wave of optimism from 2024 will carry into 2025.

Social Media, Digital Display/Video, and Connected TV (CTV) remain the fastest-growing channels, with a consistent rise in investment that aligns with consumer engagement and time spent. Specifically, 68% of survey respondents plan to increase their Social Media spending, 67% for Digital Display/Video, and 55% for CTV. Additionally, 28%, 30%, and 36% of marketers, respectively, intend to maintain their investments in these channels.
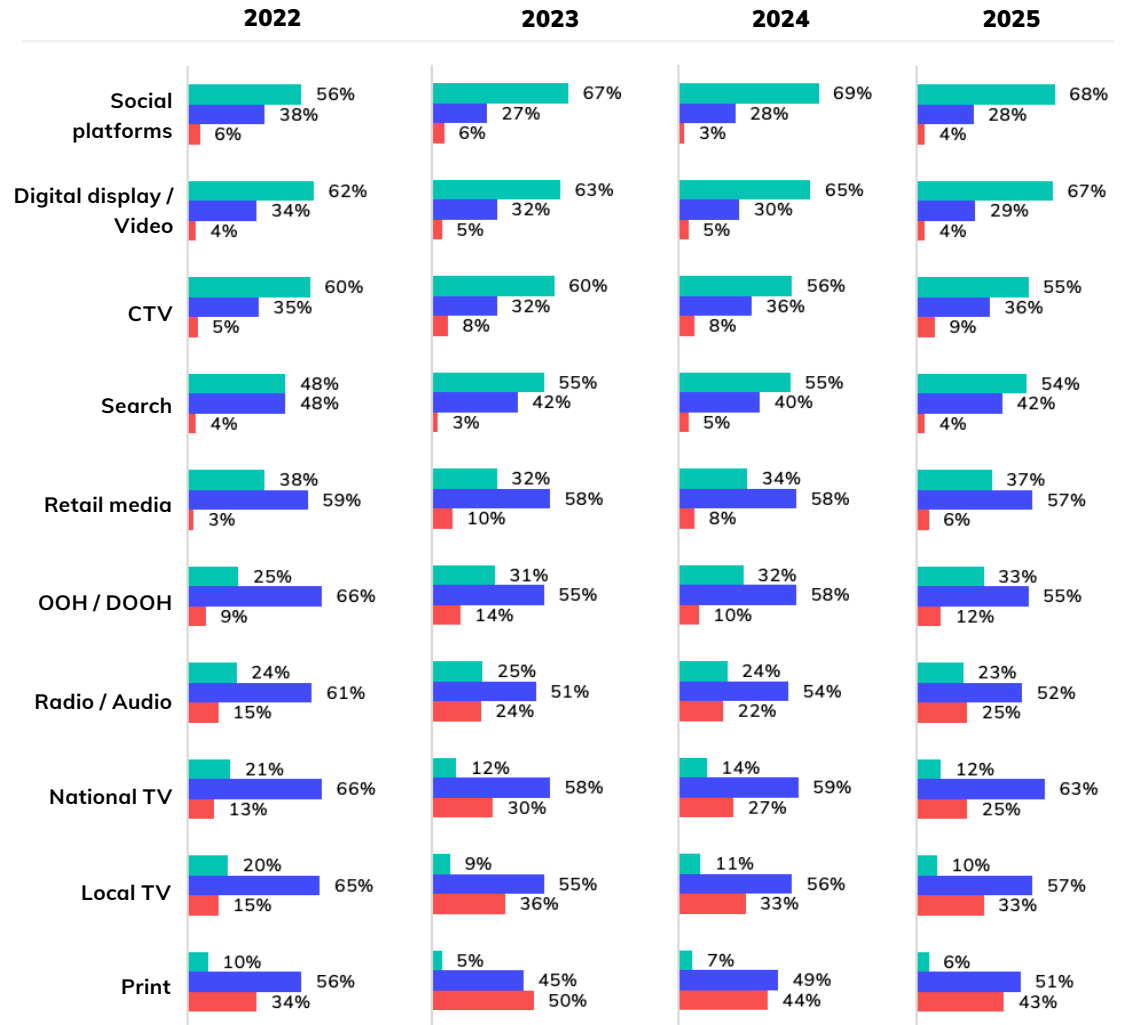
On the other hand, Radio/Audio has joined Print and TV in experiencing a decline in investment. While more respondents are decreasing their budgets in these areas than increasing them, the majority still report maintaining their current levels.

Reviewing the data from the past four years, it's evident that traditional media is being increasingly deprioritized as digital channels gain momentum and popularity among both consumers and advertisers. Social Platforms, in particular, have experienced remarkable growth, with a 21% increase in ad spending between 2022 and 2025. This shift underscores the growing importance of digital and social media in shaping advertising strategies and reaching target audiences effectively compared to traditional channels.

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For each media channel below, do you expect to increase, decrease, or maintain your spend?

● Increase   ● Maintain   ● Decrease

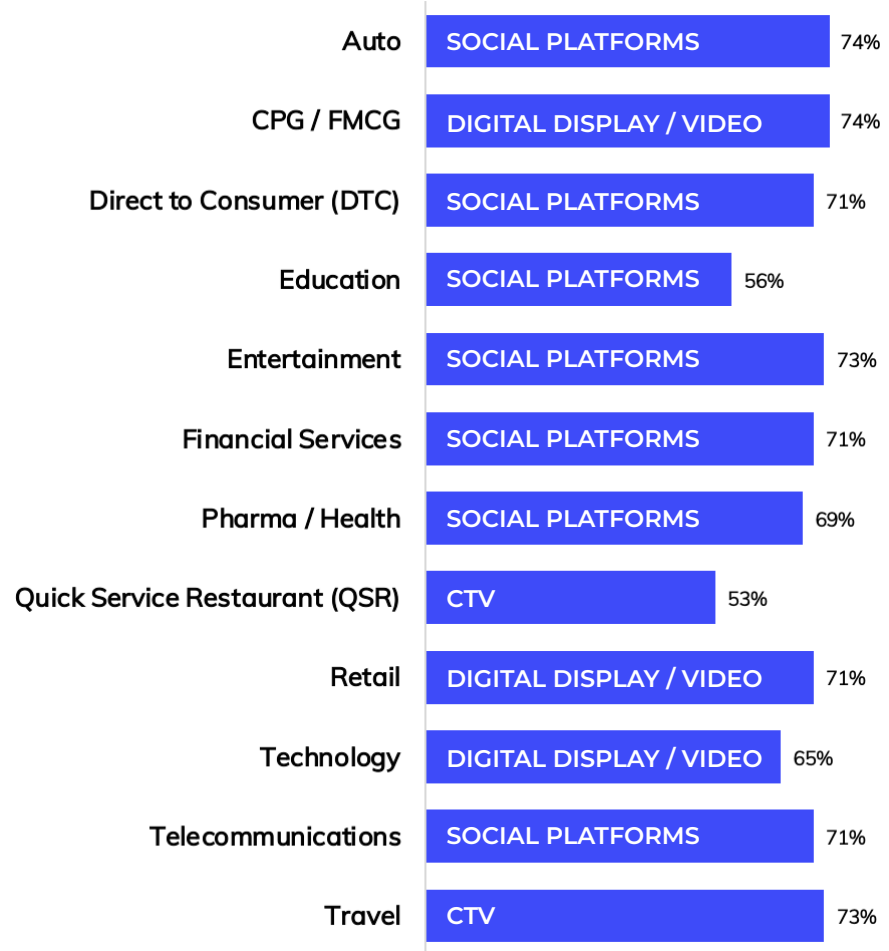| Channel	2022 Increase	2022 Maintain	2022 Decrease	2023 Increase	2023 Maintain	2023 Decrease	2024 Increase	2024 Maintain	2024 Decrease	2025 Increase	2025 Maintain	2025 Decrease
Social platforms	56%	38%	6%	67%	27%	6%	69%	28%	3%	68%	28%	4%
Digital display / Video	62%	34%	4%	63%	32%	5%	65%	30%	5%	67%	29%	4%
CTV	60%	35%	5%	60%	32%	8%	56%	36%	8%	55%	36%	9%
Search	48%	48%	4%	55%	42%	3%	55%	40%	5%	54%	42%	4%
Retail media	38%	59%	3%	32%	58%	10%	34%	58%	8%	37%	57%	6%
OOH / DOOH	25%	66%	9%	31%	55%	14%	32%	58%	10%	33%	55%	12%
Radio / Audio	24%	61%	15%	25%	51%	24%	24%	54%	22%	23%	52%	25%
National TV	21%	66%	13%	12%	58%	30%	14%	59%	27%	12%	63%	25%
Local TV	20%	65%	15%	9%	55%	36%	11%	56%	33%	10%	57%	33%
Print	10%	56%	34%	5%	45%	50%	7%	49%	44%	6%	51%	43%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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Looking at the numbers by industry vertical, more than half of the sectors we surveyed identified Social Platforms as the primary channel for increased ad spending, followed by one-quarter citing Digital Display/Video. Quick Service Restaurant (QSR) and Travel were outliers in selecting CTV as their top channel for increased ad spending.

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Top channel by vertical

Vertical	Top Channel	%
Auto	SOCIAL PLATFORMS	74%
CPG / FMCG	DIGITAL DISPLAY / VIDEO	74%
Direct to Consumer (DTC)	SOCIAL PLATFORMS	71%
Education	SOCIAL PLATFORMS	56%
Entertainment	SOCIAL PLATFORMS	73%
Financial Services	SOCIAL PLATFORMS	71%
Pharma / Health	SOCIAL PLATFORMS	69%
Quick Service Restaurant (QSR)	CTV	53%
Retail	DIGITAL DISPLAY / VIDEO	71%
Technology	DIGITAL DISPLAY / VIDEO	65%
Telecommunications	SOCIAL PLATFORMS	71%
Travel	CTV	73%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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AI: Top consumer trend surpasses CTV

When we asked marketers to rank the most critical consumer technology and media trends, Generative AI (Gen AI) topped the list with 63%. As the technology has undergone rapid and unprecedented advancements, advertisers are more quickly embracing Gen AI. According to a November 2024 study by Microsoft, the use of Gen AI increased from 55% in 2023 to 75% in 2024.
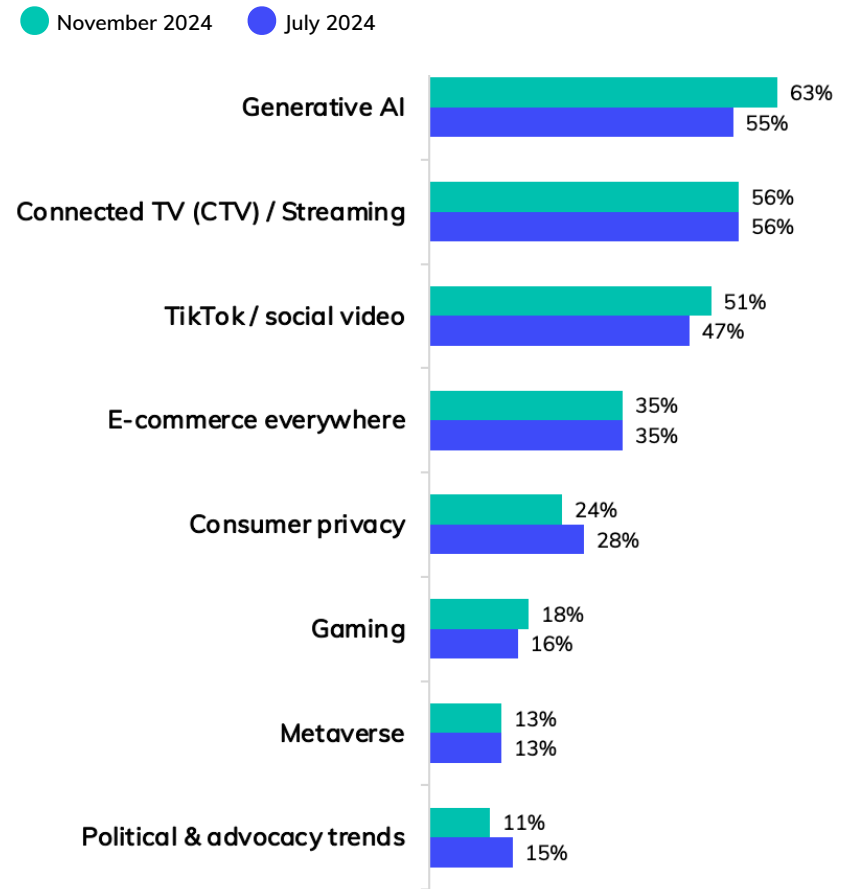
OpenAI has remained at the forefront of this trend with the introduction of the ChatGPT Store, a platform that allows users to create, customize, and share GPTs tailored for specific tasks. This development has rendered AI tools notably more approachable, not only for seasoned developers but also for the average, non-technical user. Furthermore, OpenAI unveiled GPT-4o, a versatile model capable of handling text, images, and audio in multiple languages. This marks a major advancement in AI technology, providing enhanced and comprehensive processing for various forms of media.

While OpenAI and ChatGPT lead the market, other tech giants are also integrating Gen AI into their products. Google has incorporated generative AI into its Search platform, enabling users to receive AI-generated summaries that provide more detailed and synthesized information.

CTV, which was the top trend in our previous survey, now ranks second with 56% of marketers considering it the most critical consumer trend. CTV remains a vital channel as consumers continue to switch to streaming services with ad-supported options.
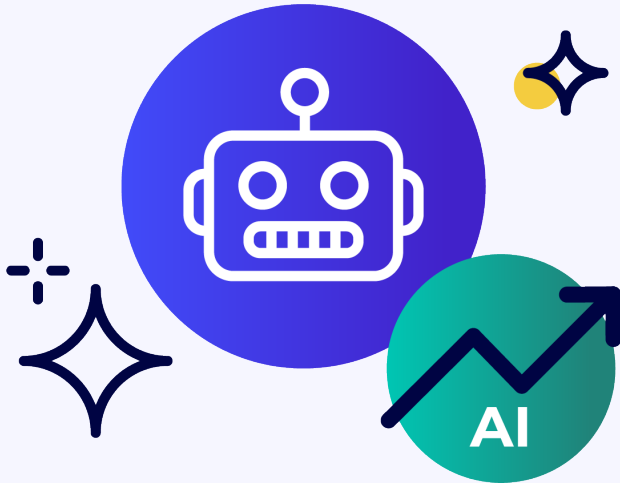
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What are the most important consumer trends you're watching for 2025?

● November 2024　　● July 2024

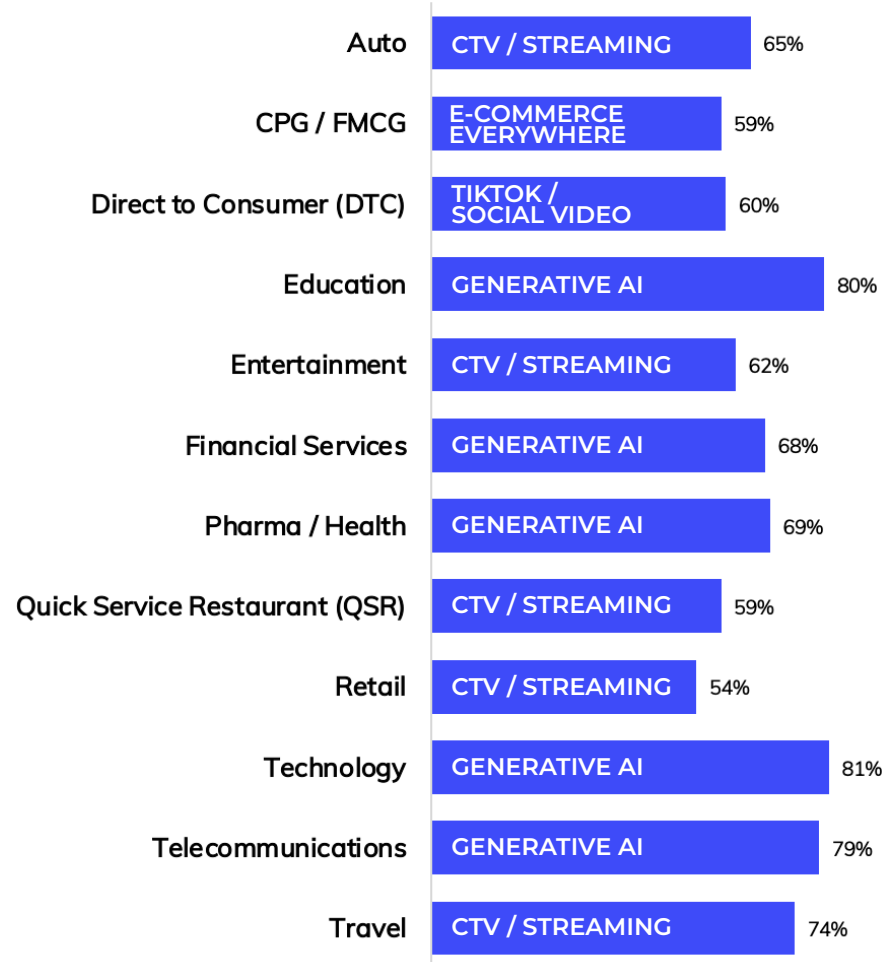| Trend	November 2024	July 2024
Generative AI	63%	55%
Connected TV (CTV) / Streaming	56%	56%
TikTok / social video	51%	47%
E-commerce everywhere	35%	35%
Consumer privacy	24%	28%
Gaming	18%	16%
Metaverse	13%	13%
Political & advocacy trends	11%	15%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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When we break down the data into 12 industry verticals, 5 chose Gen AI and 5 chose CTV. CPG/FMCG companies favor E-commerce Everywhere, while direct-to-consumer (DTC) brands prefer TikTok and Social Video as their top trends.

While Google is working to make its Gemini AI chatbot work better with Android devices, Apple's Apple Intelligence wants to make things easier for users by letting AI work inside apps. Cognizant and Microsoft formed a global partnership to help businesses adopt Gen AI, leveraging Microsoft Copilot and Cognizant's services.

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Top trend by vertical

Vertical	Top Trend	%
Auto	CTV / STREAMING	65%
CPG / FMCG	E-COMMERCE EVERYWHERE	59%
Direct to Consumer (DTC)	TIKTOK / SOCIAL VIDEO	60%
Education	GENERATIVE AI	80%
Entertainment	CTV / STREAMING	62%
Financial Services	GENERATIVE AI	68%
Pharma / Health	GENERATIVE AI	69%
Quick Service Restaurant (QSR)	CTV / STREAMING	59%
Retail	CTV / STREAMING	54%
Technology	GENERATIVE AI	81%
Telecommunications	GENERATIVE AI	79%
Travel	CTV / STREAMING	74%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

AI

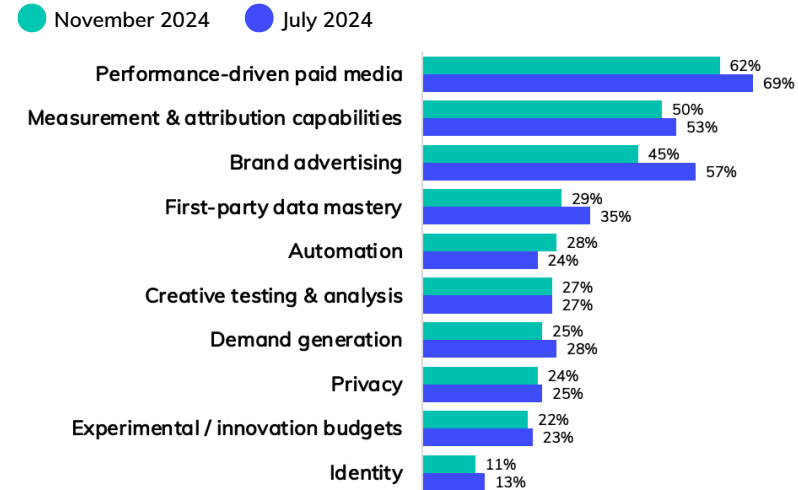## mediaocean

Automation: The fastest-rising investment

While Performance-Driven Paid Media, Measurement and Attribution Capabilities, and Brand Advertising remain the top three critical investments, Automation has emerged as the fastest-growing area. Compared to our July 2024 survey, the number of respondents identifying Automation as a critical capability has increased by 17%, with 28% of marketers now selecting it. Automation was the only option that saw an increase, while Creative Testing and Analysis remained unchanged, and the rest declined.

Automation and AI work together to streamline omnichannel workflows. With Automation, advertisers can use a single platform for all channels, eliminating time wasted on manual, redundant tasks. Innovative ad tech platforms use Automation and AI to help build compelling, brand-safe creative at scale, surface actionable insights, optimize campaigns, and drive better business outcomes across channels.
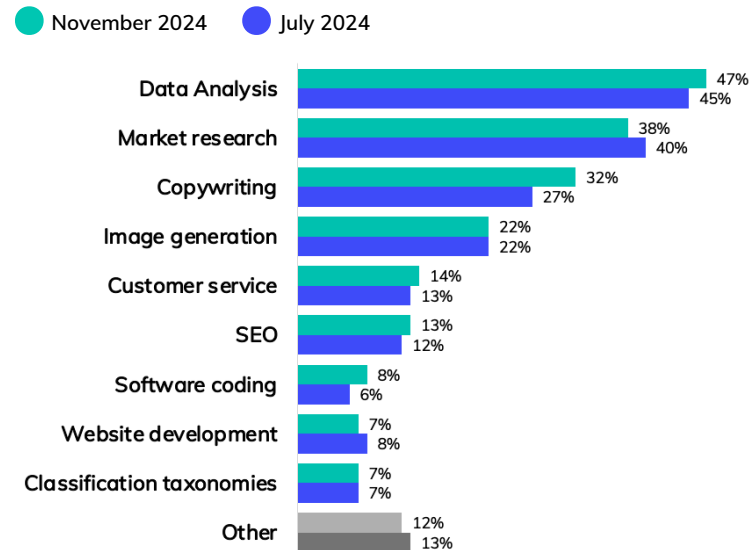
As advertisers increasingly implement Automation into their processes and technologies, they are finding it easier to streamline workflows and apply AI to solve practical challenges.

The most common applications of AI are Data Analysis and Market Research, with 47% and 38% of use cases, respectively. Copywriting and Image Generation follow with 32% and 22% of use cases.

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Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?
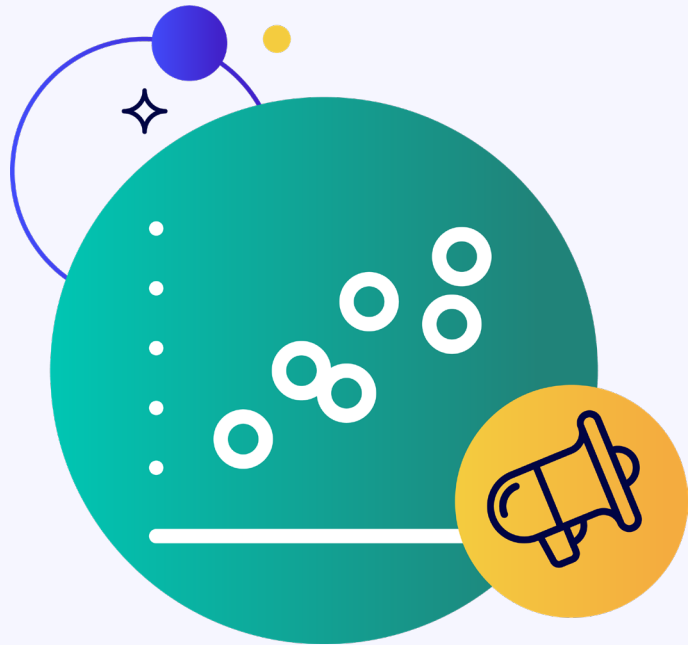
● November 2024   ● July 2024

Capability	November 2024	July 2024
Performance-driven paid media	62%	69%
Measurement & attribution capabilities	50%	53%
Brand advertising	45%	57%
First-party data mastery	29%	35%
Automation	28%	24%
Creative testing & analysis	27%	27%
Demand generation	25%	28%
Privacy	24%	25%
Experimental / innovation budgets	22%	23%
Identity	11%	13%

How are you currently using Generative AI in your marketing?

● November 2024   ● July 2024

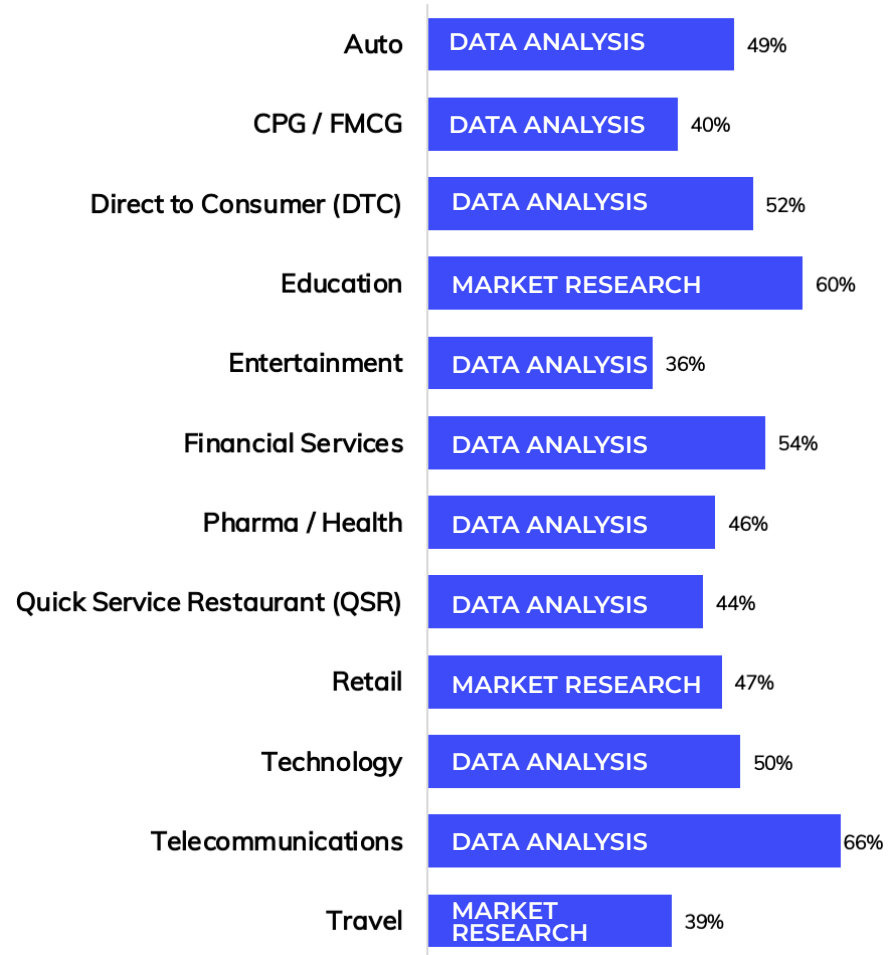| Application	November 2024	July 2024
Data Analysis	47%	45%
Market research	38%	40%
Copywriting	32%	27%
Image generation	22%	22%
Customer service	14%	13%
SEO	13%	12%
Software coding	8%	6%
Website development	7%	8%
Classification taxonomies	7%	7%
Other	12%	13%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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When we break down the numbers by vertical, three-quarters of the industries identified Data Analysis as their most prevalent use case. This includes sectors like Auto, CPG/FMCG, DTC, Entertainment, Financial Services, Tech, and Telecommunications. One-quarter of the verticals, primarily from Education, Retail, and Travel, indicated Market Research as their primary use case for Gen AI.

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Top trend by vertical

Vertical	Top trend	%
Auto	DATA ANALYSIS	49%
CPG / FMCG	DATA ANALYSIS	40%
Direct to Consumer (DTC)	DATA ANALYSIS	52%
Education	MARKET RESEARCH	60%
Entertainment	DATA ANALYSIS	36%
Financial Services	DATA ANALYSIS	54%
Pharma / Health	DATA ANALYSIS	46%
Quick Service Restaurant (QSR)	DATA ANALYSIS	44%
Retail	MARKET RESEARCH	47%
Technology	DATA ANALYSIS	50%
Telecommunications	DATA ANALYSIS	66%
Travel	MARKET RESEARCH	39%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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Shifting focus: Preparing for a multi-ID future

Advertisers are less concerned about preparing for a cookieless future compared to last year. In 2023, 39% of advertisers were concerned about this issue, while in 2024, only 31% were concerned. Google's announcement that they will no longer deprecate cookies but instead provide more prominent opt-out mechanisms for consumers signals the continued need for innovative solutions in omnichannel measurement that incorporate cookie data, albeit with less urgency since that will remain part of the equation.

Advertisers are most worried about the decline in the ability to measure campaign effectiveness on tech platforms and the open web as they head into 2025 with almost half of marketers surveyed concerned. To address this, advertisers must adopt a multi-ID approach that includes cookies alongside other identifiers to ensure to enhance their measurement capabilities.

The value of multi-ID measurement is evident in several key areas: reach, frequency, and attribution. Multi-ID measurement allows advertisers to better understand user exposure across various formats, browsers, and devices, thus improving the accuracy of their reach metrics. These solutions provide a more consistent and reliable way to measure
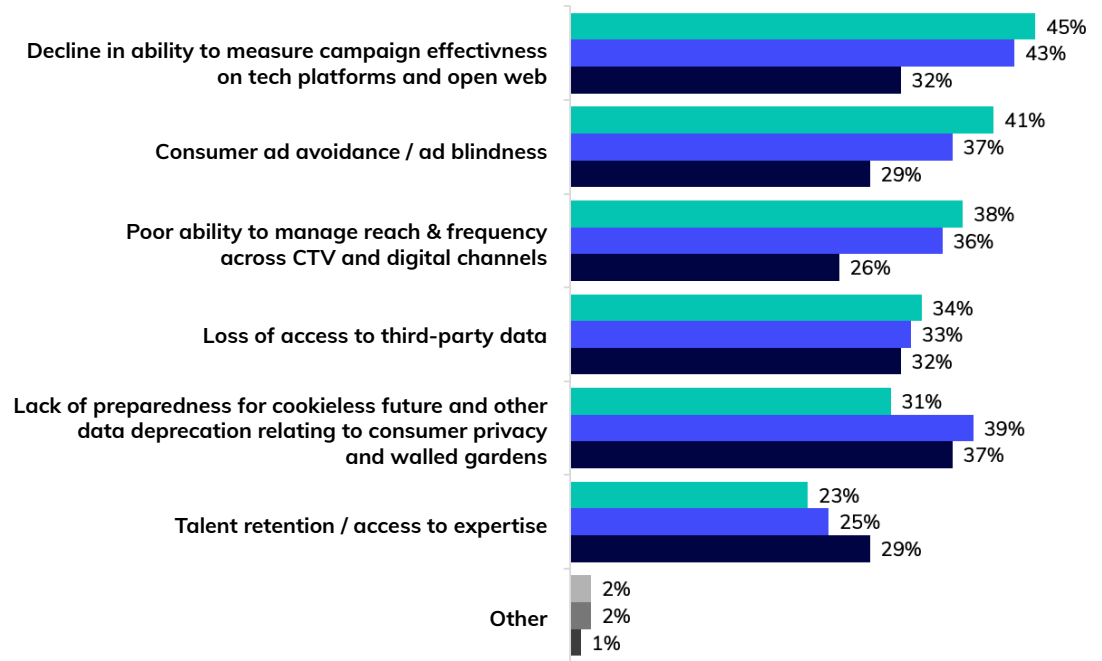
how often users are exposed to ads, ensuring that frequency caps are set and maintained effectively. The attribution of conversions to paid media by accurately linking ad exposures to subsequent site activity, regardless of the browser or device used, ensures a more accurate measurement of media impact.

By embracing multi-ID solutions, advertisers can futureproof their measurement, and ensure they are accurately tracking campaign effectiveness in 2025.

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What are your largest areas of concern in your media and marketing initiatives?

● November 2024   ● November 2023   ● October 2022

Decline in ability to measure campaign effectivness on tech platforms and open web
- 45%
- 43%
- 32%

Consumer ad avoidance / ad blindness
- 41%
- 37%
- 29%

Poor ability to manage reach & frequency across CTV and digital channels
- 38%
- 36%
- 26%

Loss of access to third-party data
- 34%
- 33%
- 32%

Lack of preparedness for cookieless future and other data deprecation relating to consumer privacy and walled gardens
- 31%
- 39%
- 37%

Talent retention / access to expertise
- 23%
- 25%
- 29%

Other
- 2%
- 2%
- 1%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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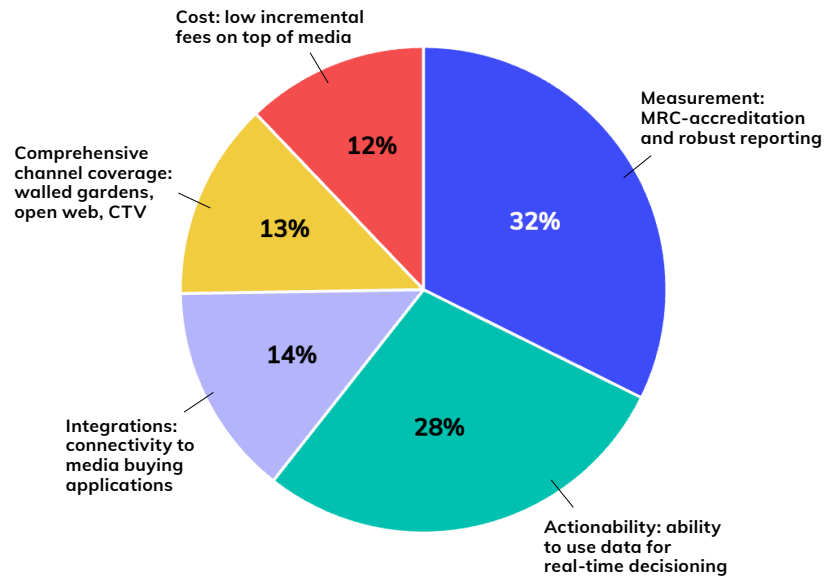# Actionability: Critical for ad verification

As concerns around ad verification grew in the past year, we introduced this question in our July survey. Our latest findings show that the aspects of verification considered most important by marketers when selecting partners and evaluating ROI are in a state of flux.

Measurement, particularly with Media Rating Council (MRC) accreditation and robust reporting, remains the top priority. Advertisers need intuitive data access with flexible reporting that provide actionable analytics. Notably, Actionability has remained the second most important factor, but with a 22% increase in our November 2024 survey. The ability to use data for real-time decision-making is crucial for ad verification, as it allows advertisers to be proactive with their media strategies and apply insights to optimize campaign performance.

In a separate survey conducted in October 2024 on ad verification and brand safety, 87% of marketers agreed that rebuilding trust in ad verification is essential, and 75% of respondents viewed brand safety as more critical than it was six months ago. 66% of marketers surveyed also advocated for a verification model focused on factoring positive content engagement rather than relying strictly on-site exclusions and negative keywords.

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What aspect of ad verification is most critical when selecting partners and evaluating return on investment?

Pie chart:
- Cost: low incremental fees on top of media — 12%
- Comprehensive channel coverage: walled gardens, open web, CTV — 13%
- Integrations: connectivity to media buying applications — 14%
- Actionability: ability to use data for real-time decisioning — 28%
- Measurement: MRC-accreditation and robust reporting — 32%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

For our 2025 Advertising Outlook Report, Integrations for connectivity to media buying applications came in third. Verification solutions must be seamlessly integrated with ad servers to ensure an end-to-end streamlined workflow, which increases efficiency, reduces errors, saves time, and cuts costs in both media and verification processes.

Comprehensive Channel Coverage (including walled gardens, the open web, and CTV) and Cost rounded out the fourth and fifth places. Advertisers have faced challenges such as limited options, higher costs, and a slowdown in innovation due to the concentration of services with two primary providers. As we enter 2025, a positive security model for verification presents compelling opportunities for marketers.

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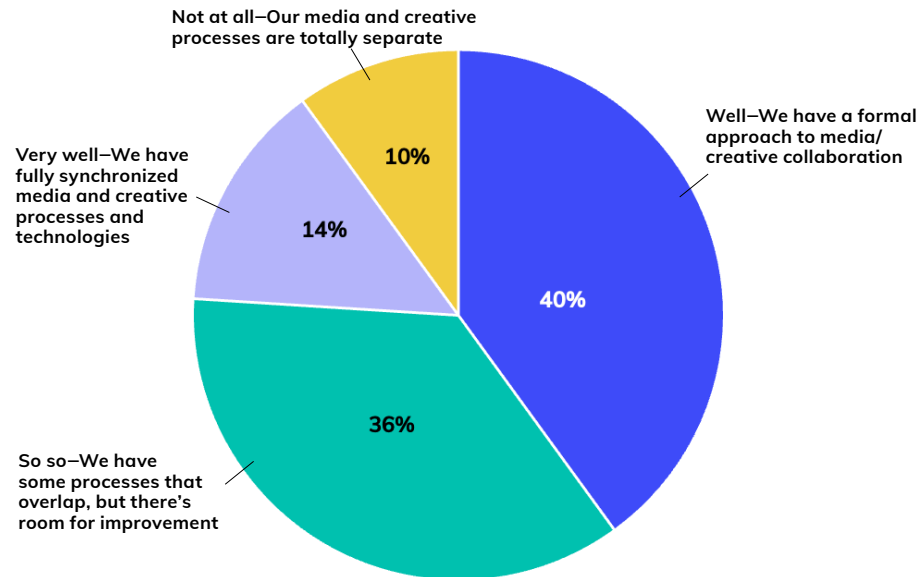# Creative-media gap: Small strides, big opportunities

In our research, 86% of respondents reported that they do not have fully synchronized media and creative processes and technologies, a slight improvement from 89% in our 2024 Advertising Outlook Report. Only 14% of advertisers are fully synchronized in 2025 compared to 12% in 2024. Despite this initial progress, the industry still has significant room for improvement.

The "creative-media" gap is primarily caused by the industry's overemphasis on media at the expense of creative content. This disparity has a profound impact, especially in a world where consumers increasingly respond to and reward personalized experiences. Closing this gap represents the most significant growth opportunity for brands.

To address these gaps, brands need to implement independent ad tech platforms that connect the silos between teams, allowing the delivery of more efficient production, versioning, and distribution of creative. Essential to this solution is the enablement of personalization to ensure the most relevant and impactful brand message reaches the right consumer at the right moment.

The ability to deploy intelligence for a deep understanding of what messages are connecting with different audiences and environments with granularity and transparency of data is imperative. With a comprehensive Creative Ad Tech stack, advertisers can seamlessly integrate with existing platforms and collaborate with partners in both creative and media domains, empowering teams to effectively bridge the creative-media gap.

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How well synchronized are your media efforts?

- Not at all—Our media and creative processes are totally separate — 10%
- Very well—We have fully synchronized media and creative processes and technologies — 14%
- Well—We have a formal approach to media/creative collaboration — 40%
- So so—We have some processes that overlap, but there's room for improvement — 36%

Source: Mediaocean 2025 Advertising Outlook Report
Methodology: Survey of 688 marketing professionals conducted through TechValidate in November 2024

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Conclusion

In 2025, the advertising industry is poised for continued growth and transformation.

The sustained increase in ad spending, particularly in digital channels, underscores a market that is highly attuned to the continued shift in consumer attention. Advertisers are maintaining and even expanding their budgets from the previous year, signaling a strong commitment to leveraging advertising for business success.

The steady rise of AI, driven by ongoing advancements and widespread adoption by tech giants, has solidified its position as a critical technology in the advertising world. AI is now an indispensable tool, enhancing content generation, research, and analytics, and deeply integrating into daily workflows. This technology is not just a trend but a fundamental shift that is reshaping how advertisers operate.

Automation is also playing a more significant role, as advertisers seek to optimize their omnichannel strategies. By streamlining workflows, automation saves time and reduces manual, repetitive tasks, allowing teams to focus on more strategic initiatives.

Accurate measurement remains a top concern, and advertisers need to adopt a multi-ID approach. This strategy, which combines cookies with other identifiers, is essential for improving reach, frequency, and attribution, ensuring that campaigns are effectively measured and optimized.

The ad verification space has seen groundbreaking developments, compelling marketers to reassess and prioritize their partnerships. The emphasis on actionability is crucial to maintaining high standards of ad delivery and ensuring that every dollar spent yields tangible results.

Despite some progress, the creative-media gap continues to be a critical issue. To bridge this divide, the industry must implement independent ad tech platforms that can connect silos, enable personalization, and deploy advanced intelligence.

This integration is vital for creating cohesive, effective advertising strategies that resonate with consumers and drive business outcomes.

2025 will be a year of significant advancements and challenges in the advertising industry. By embracing AI, automation, and multi-ID measurement, and by addressing the creative-media gap, advertisers are well-positioned to navigate the complexities of the market and achieve their goals in the coming year.

Methodology

This survey was conducted via TechValidate in November 2024 and contains data from 688 respondents representing brands, agencies, media companies, measurement firms, tech platforms, and other marketing industry constituents.

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About Mediaocean

Mediaocean is powering the future of the advertising ecosystem with technology that empowers brands and agencies to deliver impactful omnichannel marketing experiences. With over $200 billion in annualized ad spend running through its software products, Mediaocean deploys AI and automation to optimize investments and outcomes. The company's advertising infrastructure and ad tech tools are used by more than 100,000 people across the globe. Mediaocean owns and operates Prisma, the industry's trusted system of record for media management and finance, Flashtalking, an innovative ad server and creative personalization platform, as well as Protected by Mediaocean, an MRC-accredited ad verification solution.
Visit **www.mediaocean.com** for more information.

About Flashtalking

Flashtalking unleashes the power of creative to make media work better. As the leading independent platform for personalization, orchestration, and intelligence across all marketing channels, our Creative Ad Tech bridges the gap between creative and media. We provide AI and automation to connect the silos between teams and deliver more efficient production, versioning, and distribution of creative. Our solutions operate at scale across CTV, Video, Display, Social, Native, Audio, DOOH, and Retail Media channels. As part of Mediaocean, Flashtalking is tied into the industry's core ad infrastructure for omnichannel planning, buying, and billing. Visit **www.flashtalking.com** for more information.