

2025 H2

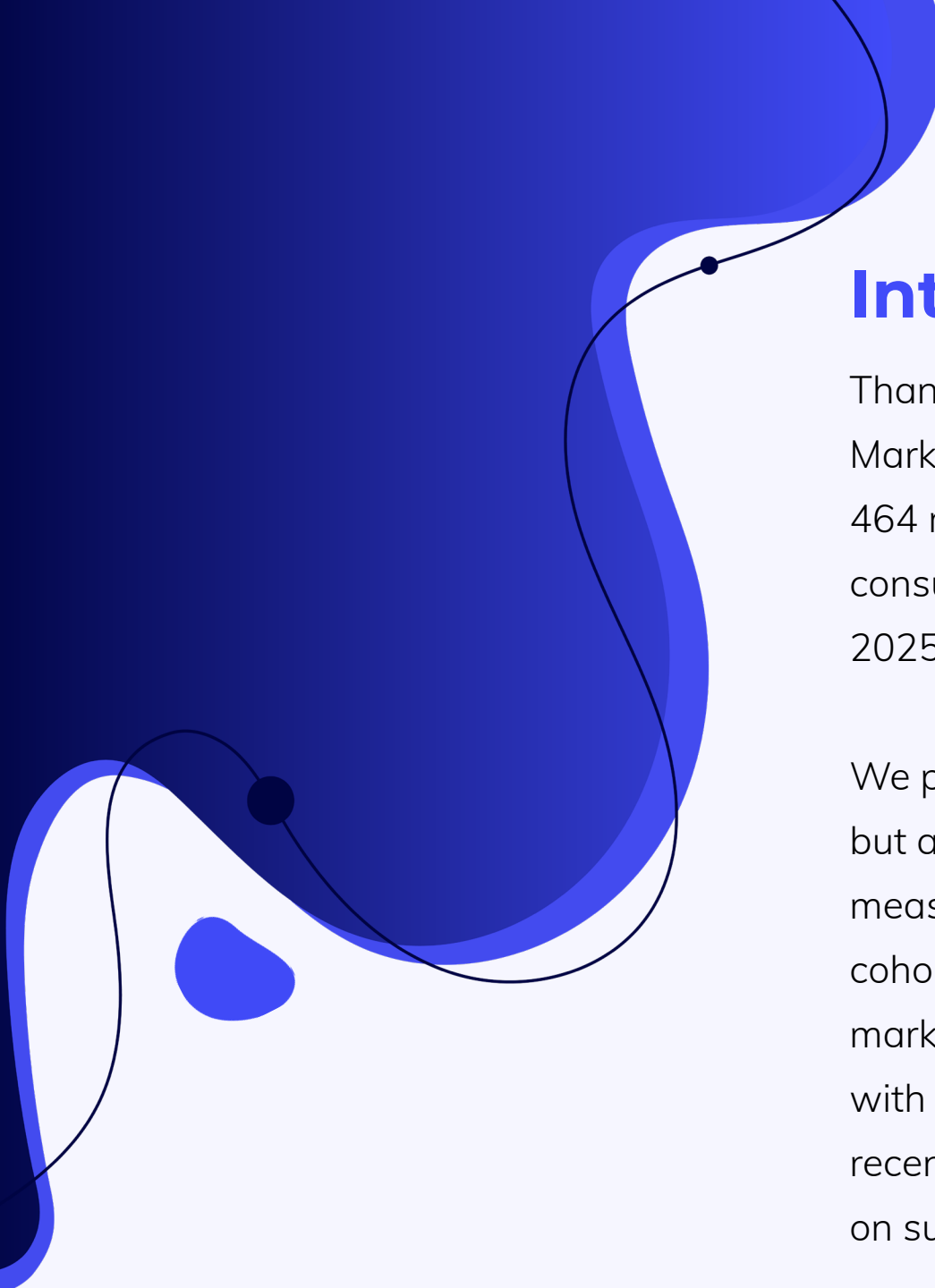
Market Report

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



Table of contents

Introduction	3
Foreword by Karsten Weide	4
Insight 1: Ad spend remaining resilient	5
Insight 2: Strategic priorities: Identity and Demand Gen	6
Insight 3: Marketers double down on Gen AI	8
Insight 4: Gen AI matures across marketing functions	10
Insight 5: Personalization and measurement lead the next phase of CTV	12
Conclusion and Methodology	14
Afterword by Jon Lafayette	15



Introduction

Thank you for reading Mediaocean's 2025 H2 Market Report. These insights reflect input from 464 marketing professionals, focused on key consumer and technology trends along with 2025 H2 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 eighth in our series of bi-annual market reports, reflecting over 5,500 total respondents, with the first published at the end of 2021. The most recent data points used in this research are based on surveys conducted in May 2025.

Foreword

As we navigate the second half of 2025, the advertising industry stands at a juncture where marketers are meeting accelerating change with resilience, reinvention, and a commitment to innovation. Mediaocean's 2025 H2 Market Report—drawing on the insights of nearly 500 marketing professionals—paints a picture of an industry not merely adapting to change but actively shaping what comes next. This eighth installment in Mediaocean's bi-annual series, capturing the perspectives of brands, agencies, media companies and tech platforms, underscores a collective confidence in advertising's power to drive connection, growth, and impact amid a complex global landscape.

The broader context remains dynamic. Economic uncertainty persists, interwoven with political and societal shifts that demand brands' attention. Yet, marketers are responding with measured optimism, reallocating budgets with precision rather than retreating. This report reveals a strategic pivot toward smarter, data-driven investments, with Connected TV (CTV), social platforms, and digital display/video leading planned spending increases. CTV, in particular, continues its ascent, with 58% of respondents planning to boost investment. This reflects CTV's unique ability to blend the emotional resonance of traditional TV with the precision of digital, making it a cornerstone for both brand-building and performance-driven campaigns. Equally notable is the 22% decline in the share of respondents planning to increase search advertising spending—likely driven by consumers' growing use of AI chatbots for discovery and research.

What also stands out in this survey is the industry's sharpened focus on identity and demand generation as strategic priorities. The share of respondents who prioritize identity solutions surged by 41%, signaling a response to the ongoing erosion of third-party signals, exacerbated by the uncertain impact of Google's decision to offer user-choice controls for third-party cookies in the Chrome browser, and the accelerating shift to a multi-ID world. Marketers are embracing flexible, privacy-compliant strategies—leveraging first-party IDs, partner IDs, and probabilistic approaches—to maintain targeting and measurement effectiveness. Meanwhile, demand generation's 33% rise underscores a commitment to scalable, long-term growth, as brands seek to nurture customer relationships in a climate of economic uncertainty and constrained budgets.

Generative AI (Gen AI) has undeniably claimed the spotlight, emerging as the top consumer trend for 72% of respondents—a 15% jump from late 2024. This clean sweep across all industry verticals reflects AI's transformation from a novel experiment to a foundational force reshaping marketing. Breakthroughs in multimodal models like GPT-4.5, Claude 4, and Gemini 2.5, alongside advancements in text-to-video tools like OpenAI's Sora and Google's Veo 3, enable deeper personalization and creative agility. Marketers are moving beyond tentative exploration, embedding AI into core functions. Data analysis (47%) and market research (46%) remain dominant applications, but creative use cases—copywriting, image generation, and creative versioning—are gaining momentum. Notably, website development saw a 70% surge, driven by AI's ability to streamline code, UX, and design.

When asked what factors were most important to drive the next phase of CTV, marketers first pointed to personalization, cited by 28% as the top driver of CTV's full-funnel performance. Measuring reach, frequency, and outcomes also remain critical pillars. Yet challenges persist. Fragmentation is a key pain point, with more than half of marketers citing limited cross-channel visibility, fragmented measurement, and data silos as persistent hurdles.

This report also captures a heightened sensitivity to political advocacy trends, which surged 82% in importance. As consumer values intersect with public discourse, brands are recalibrating messaging and partnerships to align with an increasingly value-driven and vocal audience.

Mediaocean's 2025 H2 Market Report showcases an industry thriving on innovation amid challenges. Marketers are building intelligent systems, leveraging CTV's full-funnel potential and AI's maturing creative and analytical roles. As 2026 nears, success hinges on agility, cross-functional alignment, and data-driven, measurable experiences. This industry isn't just adapting—it's shaping its future.



Karsten Weide

Principal & Chief Analyst
W Media Research

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Ad spend remaining resilient

Despite growing economic uncertainty, most marketers plan to maintain or increase spend across the majority of media channels in the second half of 2025. That said, signs of softening are beginning to appear, with 7 in 10 media channels seeing a rise in the share of marketers planning to decrease investment.

CTV moves to the top, with 58% planning to increase spend—up slightly from 55% from the previous wave. This modest lift still outpaces every other media type,—reflecting continued confidence in CTV’s full-funnel value. Social Platforms (56%) and Digital Display/Video (52%) also lead in planned increases, though both saw modest declines from earlier this year.

Search saw the biggest drop—down 22% vs. H1—likely tied to Gen AI’s impact on how consumers discover content and products.

Traditional media held steady, with National and Local TV showing little change in planned investment. While not surging, these channels may still offer perceived stability and proven reach amid digital complexity.

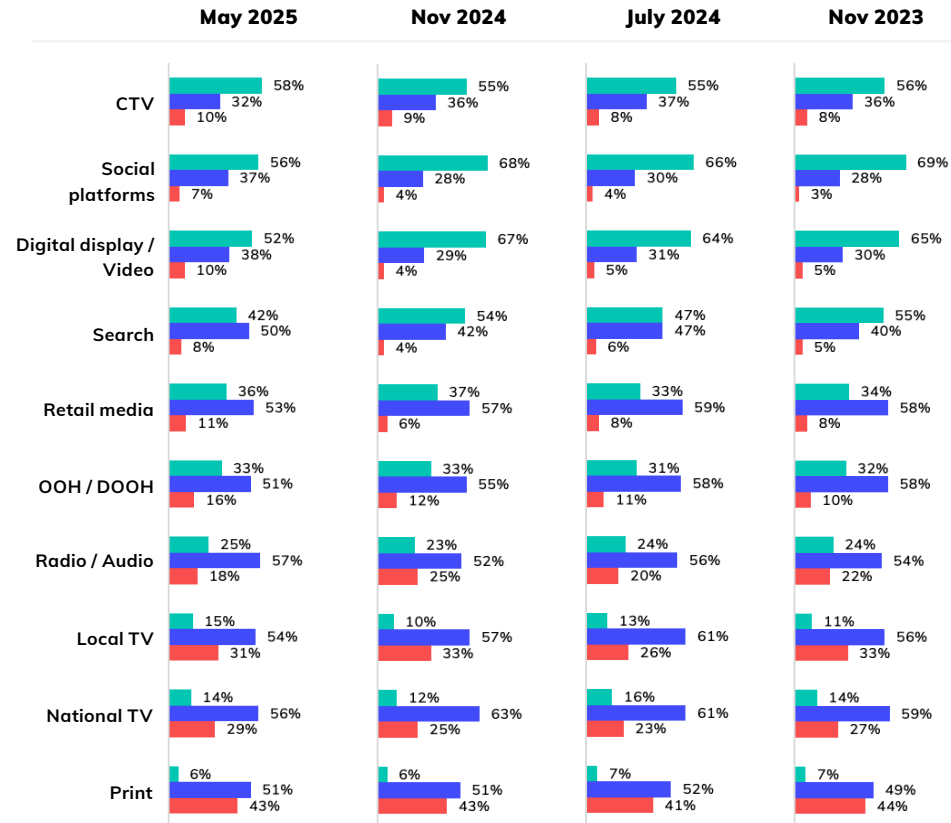
OOH/DOOH and Print held steady with little change, and while only 25% plan to increase Radio/Audio, that still marks gain over the prior wave.

Overall, while budgets are tightening, most marketers continue to maintain or grow spend—pointing to caution, not contraction.



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

● Increase ● Maintain ● Decrease



Source: Mediaocean 2025 H2 Market Report
Methodology: Four surveys of 3,468 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025



Strategic priorities: Identity and Demand Gen

While Performance-Driven Paid Media, Brand Advertising, and Measurement & Attribution remain the most critical capabilities for marketers, two areas saw notable gains in importance: Identity and Demand Generation.

Identity jumped more than 41% with the sharpest increase in prioritization from the previous wave of research. This renewed focus is likely tied to shifts in the privacy landscape, including the limbo status of Google Privacy Sandbox and the industry's continued transition to a multi-ID world. Advertisers are embracing a more flexible identity strategy that accommodates various identifiers—such as first-party IDs, partner IDs, and probabilistic IDs—to ensure continuity across platforms, devices, and channels.

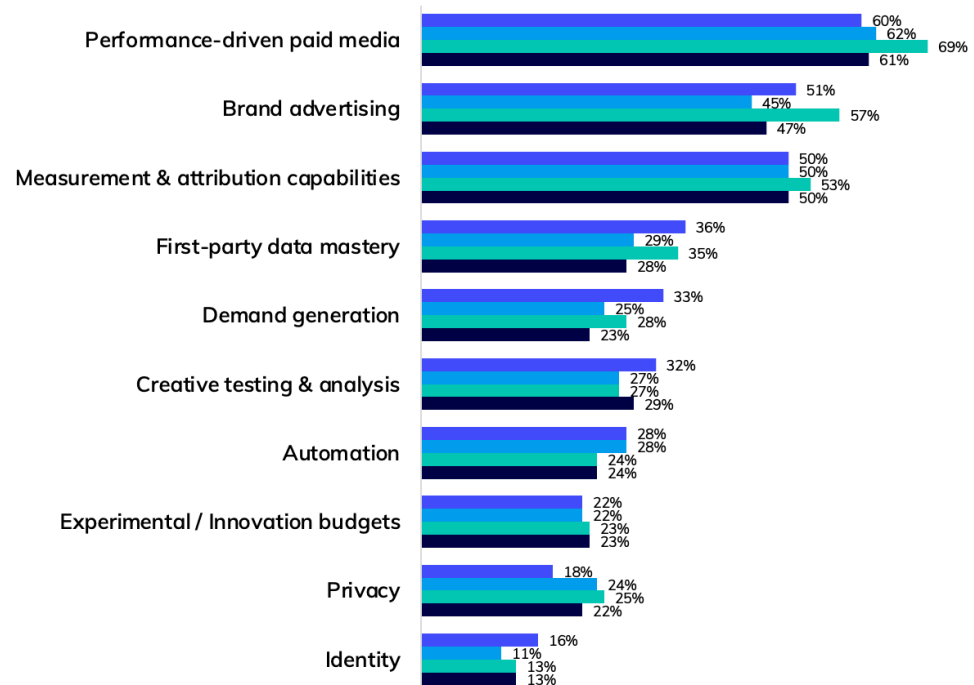
The decline of cookies has further accelerated this shift, as they are becoming less reliable and are subject to increasing privacy regulations. Marketers are now looking for robust alternatives to maintain effective targeting and measurement, ensuring that they can still reach and engage their audiences in a privacy-compliant manner.

Meanwhile, Demand Generation jumped nearly 33% since November 2024. As brands navigate continued economic uncertainty, demand-gen strategies that focus on building and nurturing customer interest over time are proving essential. Advertisers are increasingly drawn to its ability to drive scalable, measurable impact while delivering greater efficiency from limited budgets.



Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?

● May 2025 ● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 H2 Market Report

Methodology: Four surveys of 3,468 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

First-Party Data Mastery also continued its steady climb, reinforcing the need for brands to own their customer relationships and insights as signal loss accelerates.

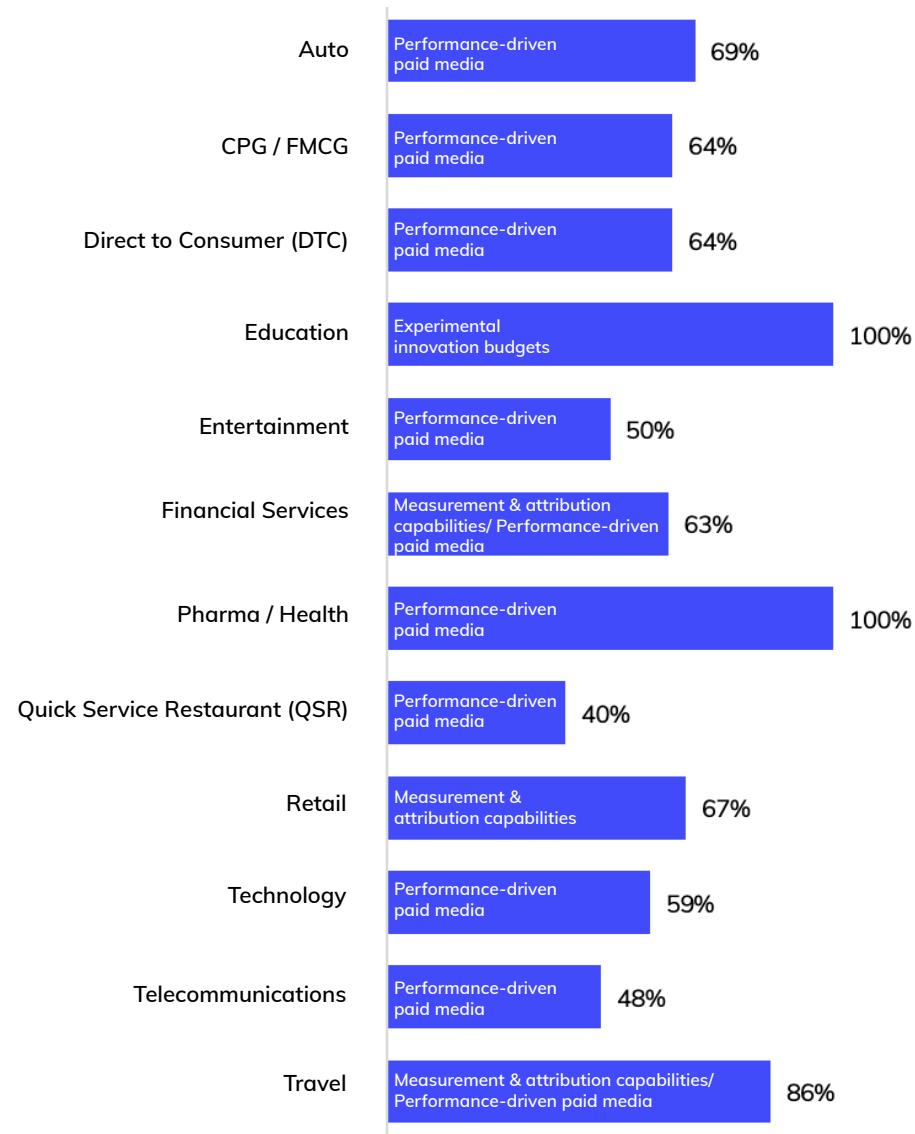
In contrast, Privacy itself saw the steepest decline, down 26%, corroborating that marketers may be deprioritizing compliance-specific initiatives in favor of more proactive, identity-based solutions.

The data signals a strategic shift: marketers are aligning investments to drive long-term brand growth and performance amid ongoing macroeconomic headwinds.



Top priority by vertical

(Percent of respondents in each category that selected the item)



Source: Mediaocean 2025 H2 Market Report

Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025



Marketers double down on Gen AI

Generative AI has firmly cemented its place as the most important consumer trend, selected by 72% of marketers in our latest survey—a 15% increase from late 2024. Every surveyed industry vertical ranked Gen AI as the top trend, marking a clean sweep that reflects the technology's growing role in shaping consumer expectations and marketing innovation.

This momentum coincides with several landmark advancements in 2025. New models like GPT-4.5, Claude 4, and Gemini 2.5 have introduced multimodal capabilities that enable seamless interaction across text, image, audio, and video—making AI feel more intuitive, personal, and accessible. Companies are now building custom GPTs and deploying private models fine-tuned to proprietary data and brand voice, driving deeper personalization at scale.

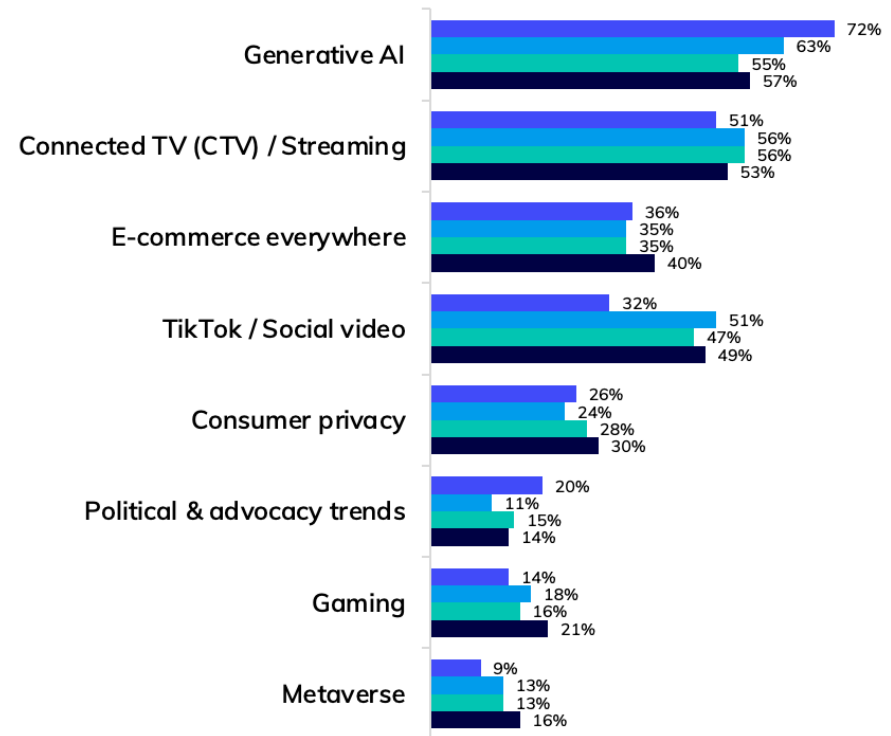
Meanwhile, AI agents have evolved to handle complex tasks, integrating with CRMs, calendars, and internal systems to function semi-autonomously. On the creative front, Gen AI is accelerating dynamic creative optimization (DCO) by generating personalized ad variants based on language, audience segments, placement context, and more. Breakthroughs in text-to-video tools—such as OpenAI's Sora and Runway Gen-3—have brought video generation closer to real-world applications, reshaping storytelling for modern platforms.

Also notable this wave is the dramatic 82% increase in Political & Advocacy Trends from the beginning of the year. From tariffs to elections to shifting economic policies, brands are paying closer attention to how consumer values intersect with public discourse. As audiences become more vocal and values-driven, marketers are reevaluating their messaging, partnerships, and positioning accordingly.



What are the most important consumer trends you're watching for?

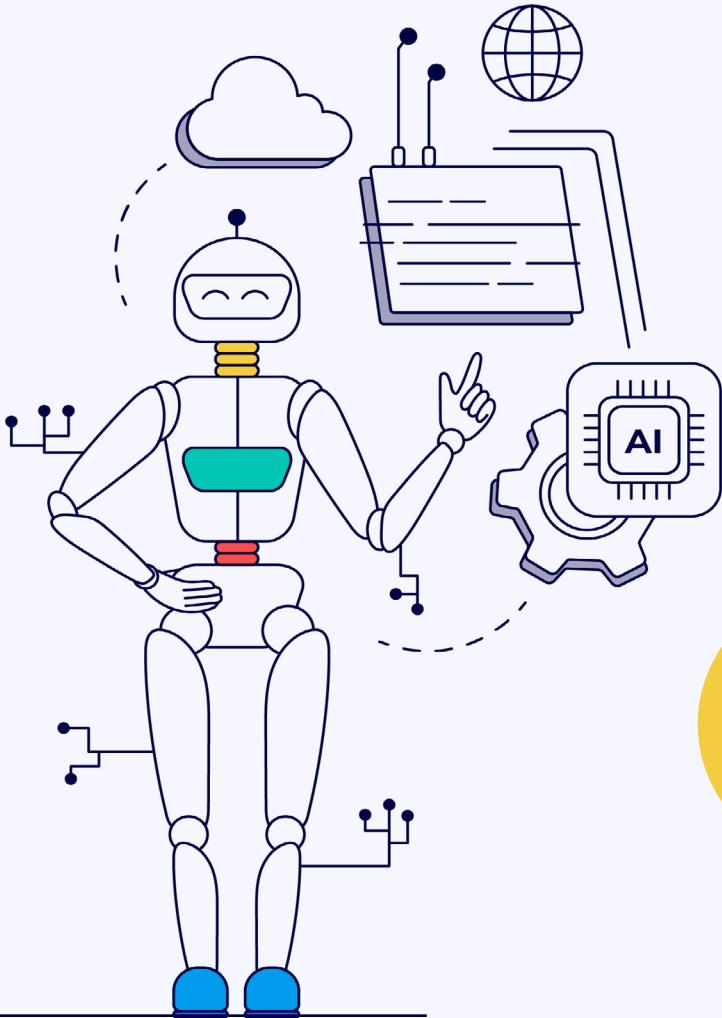
● May 2025 ● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 H2 Market Report

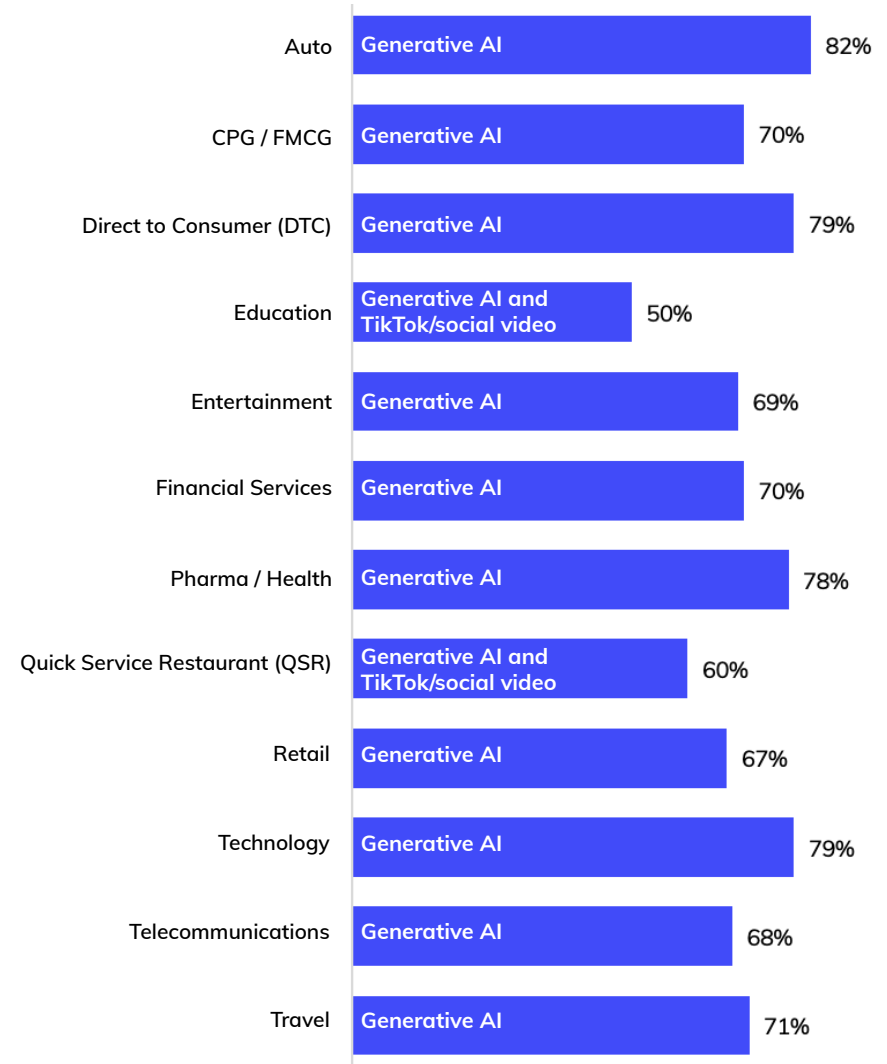
Methodology: Four surveys of 3,468 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

While CTV/Streaming remains a key trend at 51%, it dipped slightly from previous surveys. While E-Commerce Everywhere, and Consumer Privacy all maintained relevance, it's clear that AI and societal shifts are commanding the spotlight in the latter half of 2025.



Top trend by vertical

(Percent of respondents in each category that selected the item)



Source: Mediaocean 2025 H2 Market Report

Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025



Gen AI matures across marketing functions

Marketers are moving beyond experimentation with Generative AI and incorporating it into more strategic and creative workflows. Data Analysis remains the most common application, cited by 47% of respondents, reinforcing AI's role in distilling insights from increasingly complex datasets. Notably, Market Research saw a 22% increase since H1, now used by 46% of marketers, as teams lean on AI to synthesize competitive intel, consumer behavior, and campaign performance faster than ever before.

While analytical applications continue to lead, creative use cases are quickly gaining ground. Copywriting (34%) and Image Generation (25%) both ticked upward, while Creative Versioning made its debut in the survey at 27%, reflecting a growing focus on scaling personalization and streamlining creative production.

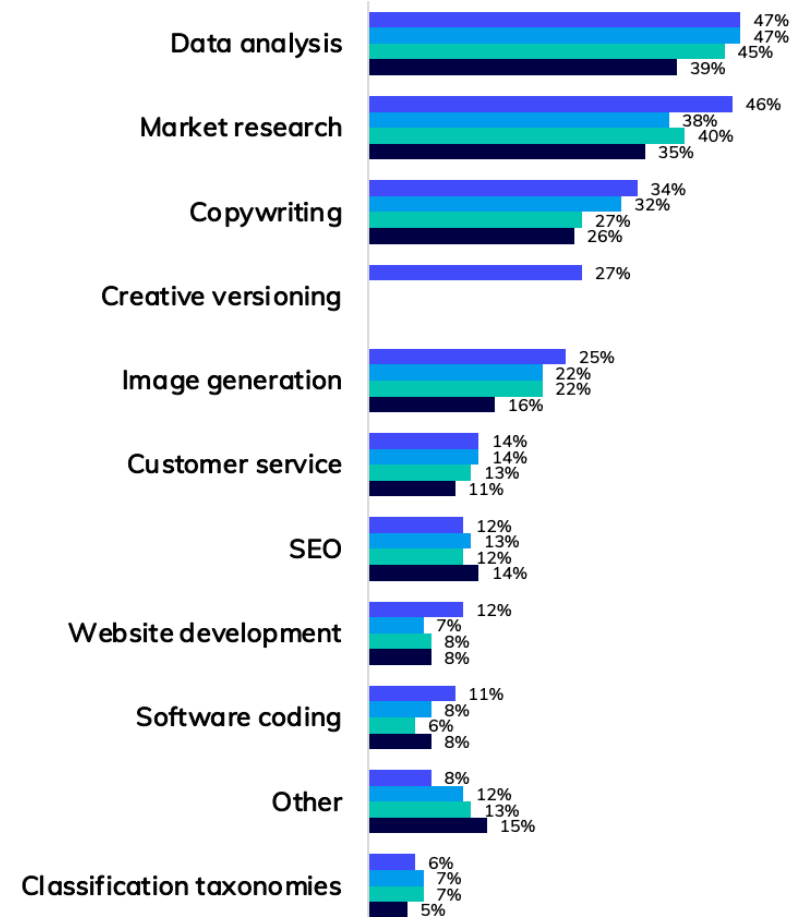
Website Development saw the largest jump, increasing more than 70% from November 2024—likely driven by AI's ability to generate and optimize code, UX content, and design frameworks. Software Coding also rose signaling growing confidence in AI's ability to assist with backend development and accelerate engineering workflows.

These shifts signal that AI's influence is steadily extending from back-end analysis to front-end experiences. When asked about the anticipated impact over the next 12 months, 31% of respondents expect major disruption in creative optimization, while 25% foresee significant change in media planning and buying.



How are you using Generative AI in your marketing?

● May 2025 ● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 H2 Market Report
Methodology: Four surveys of 3,468 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

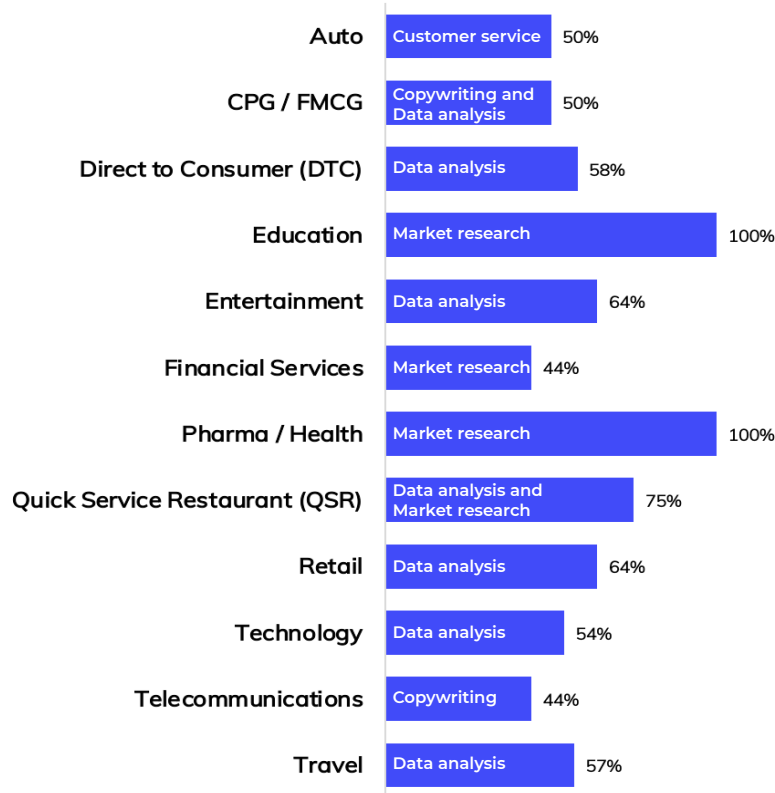
The latter suggests that although AI is poised to play a bigger role in decisioning, entrenched systems and workflows in media buying will take longer to evolve.

Still, as AI capabilities grow—particularly in multimodal content creation and adaptive learning—the ability to deliver smarter, faster, and more personalized campaigns is no longer a distant vision. It’s a present-day priority.



Top AI use case by vertical

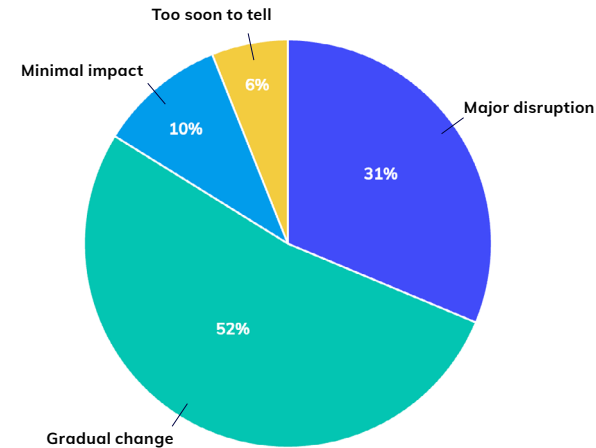
(Percent of respondents in each category that selected the item)



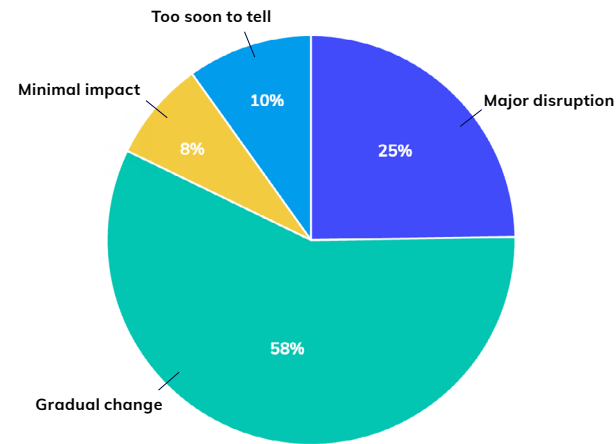
Source: Mediaocean 2025 H2 Market Report
Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025



What impact do you believe AI will have on creative optimization in the next 12 months?



What impact do you believe AI will have on media planning and buying in the next 12 months?



Source: Mediaocean 2025 H2 Market Report
Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025





Personalization and measurement lead the next phase of CTV

As CTV continues to solidify its place in omnichannel strategies, marketers are demanding more from the channel—especially when it comes to personalization, performance, and precision.

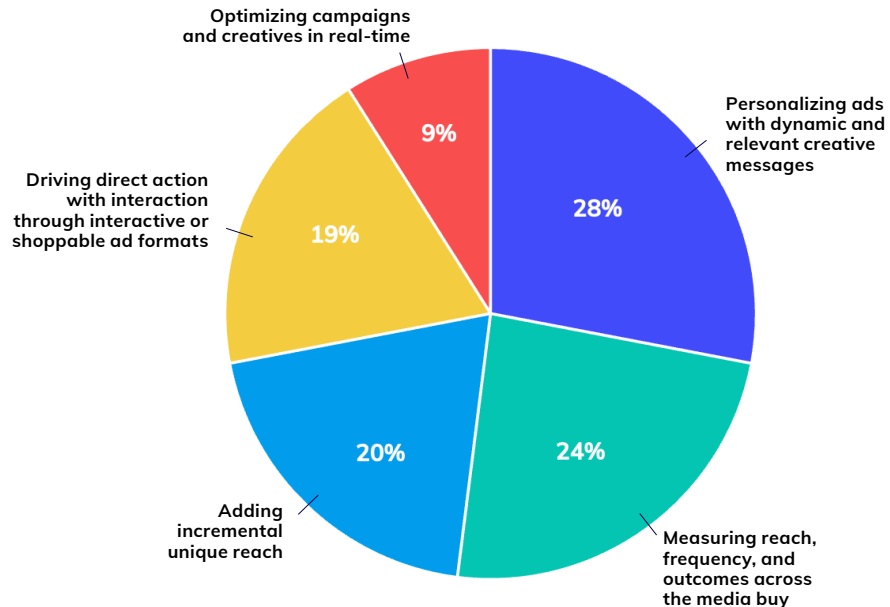
When asked which aspect of CTV is most important for driving full-funnel performance, personalizing ads with dynamic, relevant creative messages ranked highest at 28%. This points to an industry-wide shift toward audience-first, data-informed storytelling. With more advanced creative tools and access to real-time data, advertisers are looking to tailor messaging by viewer, moment, and screen.

Still, performance doesn't stop at the creative. Measurement and accountability remain top priorities, with 24% of respondents emphasizing the importance of measuring reach, frequency, and outcomes across the media buy. This aligns with the metrics marketers value most in CTV and live sports campaigns—conversions (45%) and reach (44%) lead the way, followed closely by engagement time (39%) and impressions (38%). These results reflect a growing emphasis on achieving both performance outcomes and brand impact.

However, the path to optimization is far from frictionless. Fragmentation remains a persistent challenge, with 52% of respondents citing limited cross-channel visibility and another 52% highlighting a lack of unified measurement.



What aspect of CTV is most important to drive full-funnel performance?



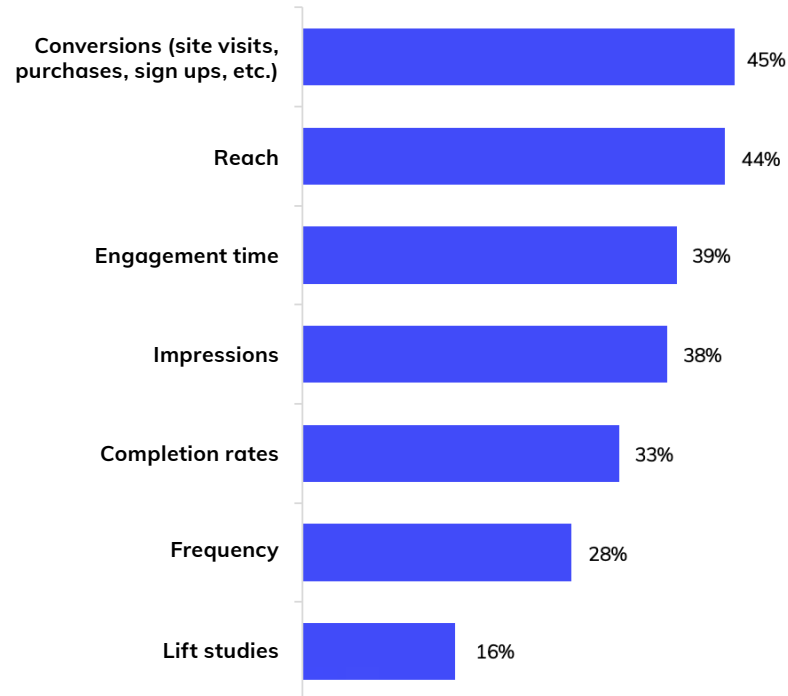
Source: Mediaocean 2025 H2 Market Report

Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025

Additionally, data silos across platforms (49%) make it harder to uncover insights, apply learnings, and course-correct in real time—perhaps explaining why real-time optimization ranked lowest (9%) as a current CTV priority, despite its potential value.

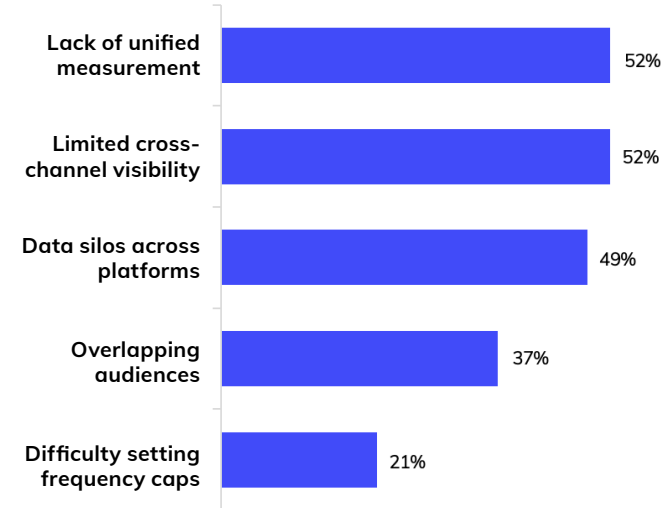
The takeaway is clear: marketers are ready for CTV to deliver more, but the ecosystem must catch up. Seamless creative versioning and unified measurement are no longer nice-to-haves—they're prerequisites for unlocking the full value of CTV as a performance channel.

Which metrics are most important when evaluating CTV/live sports campaigns?



Source: Mediaocean 2025 H2 Market Report
Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025

What are the biggest challenges you face with frequency management today?



Source: Mediaocean 2025 H2 Market Report
Methodology: Survey of 464 total marketing professionals conducted through SurveyMonkey in May 2025

Conclusion

As we head into the back half of 2025, marketers are balancing short-term performance with long-term resilience. From maturing AI strategies to CTV innovation, the year is shaping up to be one of acceleration and recalibration.

Despite economic caution, marketers are reallocating, not retreating. Investments are shifting toward data-driven strategies, dynamic creative, and measurable media like CTV and digital video. The focus is less on spending more and more on spending smarter—with automation, AI, and identity solutions powering that efficiency.

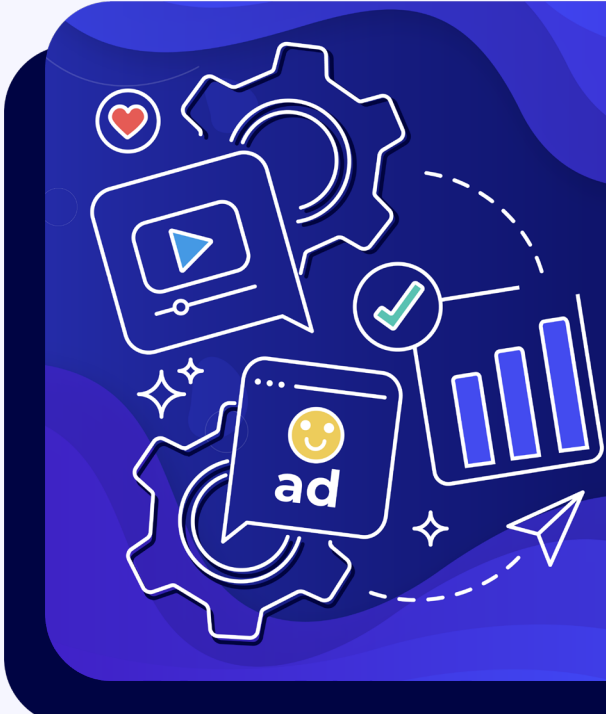
Demand generation and first-party data strategies are rising fast, reflecting a shift toward scalable, long-term impact amid economic uncertainty. Meanwhile, identity saw the sharpest increase, fueled by the deprecation of third-party signals and the end of Google's Privacy Sandbox, making cross-platform ID strategies more essential than ever.

Generative AI remains the most important consumer trend, with advances in multimodal tools and intelligent agents reshaping consumer expectations. Meanwhile, political and advocacy trends are sharply rising—forcing brands to tune into cultural, regulatory, and economic signals more closely than ever.

Marketers are going beyond experimentation, embedding AI into core marketing functions. Market research and website development saw major upticks, while creative optimization is poised for disruption through AI-driven copy, imagery, and versioning. While media planning systems may lag, the groundwork for AI transformation is clearly underway.

CTV has evolved into a true full-funnel channel, with marketers prioritizing dynamic personalization and accountable measurement. But challenges remain—particularly due to fragmentation. The next phase will depend on better cross-platform visibility and connected tools that turn insights into action.

As we move toward the close of 2025 and 2026 comes into view, marketers will face an inflection point. The retirement of legacy IDs, growing expectations for personalized experiences, and rapid AI evolution will require agility, investment, and cross-functional alignment. The brands that succeed won't just react—they'll proactively architect marketing systems that are intelligent, connected, and future-ready.



Methodology

This survey was conducted via SurveyMonkey in May 2025 and contains data from 464 respondents representing brands, agencies, media companies, measurement firms, tech platforms, and other marketing industry constituents.

Note: Values shown in graphs are rounded to the nearest whole number; all percentage changes noted in the body copy are based on actual unrounded data.

Afterword

Marketers are living in those proverbial interesting times. Tariff trauma and wild Wall Street gyrations have raised concerns about the economy. But according to Mediaocean's 2025 H2 Market Report, conditions in the advertising market aren't as bad as might have been feared.

That doesn't mean that marketers shouldn't keep their heads on a swivel. The rapid development of artificial intelligence and its integration into all things, especially all things advertising related, requires new levels of alertness, curiosity, and caution. You must learn to use AI before AI uses you.

According to this H2 Market Report, most marketers plan to spend at least as much as they spent last year to advertise on the majority of media channels. The medium most often ticketed for increased spending was connected TV (CTV). CTV was followed by social, digital display/video, search, and retail media. (The percentage of respondents predicting increases for some of these was smaller than in Mediaocean's previous survey. Search, which has been undermined by AI, was down the most.)

The report notes that even as it grows in popularity, marketers are demanding more from CTV in terms of personalization, performance, and precision.

Most often mentioned among the media channels facing cutbacks were traditional, mainly analog (shall we just come out and say old fashioned?) channels. That sure sounds like more bad news for print, national TV, and local TV. But, surprisingly, the small number of people planning to increase spending on analog channels is higher in some cases than in previous surveys. So it could have been worse.

The increased spending on digital media makes sense when you look at the list of strategy priorities marketers cited, given the worrisome macroeconomic conditions.

The top priority was performance-driven paid media, something for which marketers mainly rely on digital. No. 2 was brand advertising, which is becoming a bigger part of the digital and CTV sell.

The areas where CTV faces challenges, accurate measurement and attribution—were also reflected in the priorities mentioned by respondents. They said measurement was critical and they needed first-party mastery to make their marketing machines run at top speed.

Moving up the charts with a bullet were marketers prioritizing demand generation, reflecting short-term revenue concerns, and identity, something that could enhance targeted campaigns in the near future.

But the factor most likely to flip the script on marketing is AI.

A headline in the report is “Marketers double down on Gen AI.” Across all verticals, the consumer trend most respondents had their eye on was use of generative AI, at 72% overall, up from the second half of 2024.

While more AI-powered products are available to consumers, it may be more important for marketers to keep an eye on how AI is integrated into the complicated data-driven tasks they've been dealing with their entire careers. Generative AI is also enabling the creation of personalized versions of video ads based on language, audience segments, and content context.

According to the report, the largest group of marketers are leaning on Generative AI for data analysis and market research. There was a big increase in employing AI for website development and software coding.

Clearly AI will be doing more and more in marketing organizations going forward. They will displace people at all levels and reduce (human) headcount. But if there's one thing we've learned from previous iterations of technology, it is that machines make mistakes and only experienced, knowledgeable professionals can catch and correct before catastrophic damage is done.

Program yourself to be that person. (Reading this report should help.) Your organizations and your clients will thank you.



Jon Lafayette

Principal

Lafayette Media Group



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, Innovid, the leading independent ad tech platform for creative, delivery, measurement, and optimization, as well as Protected by MediaOcean, an integrated solution for ad verification and brand safety. Visit www.mediaocean.com for more information.