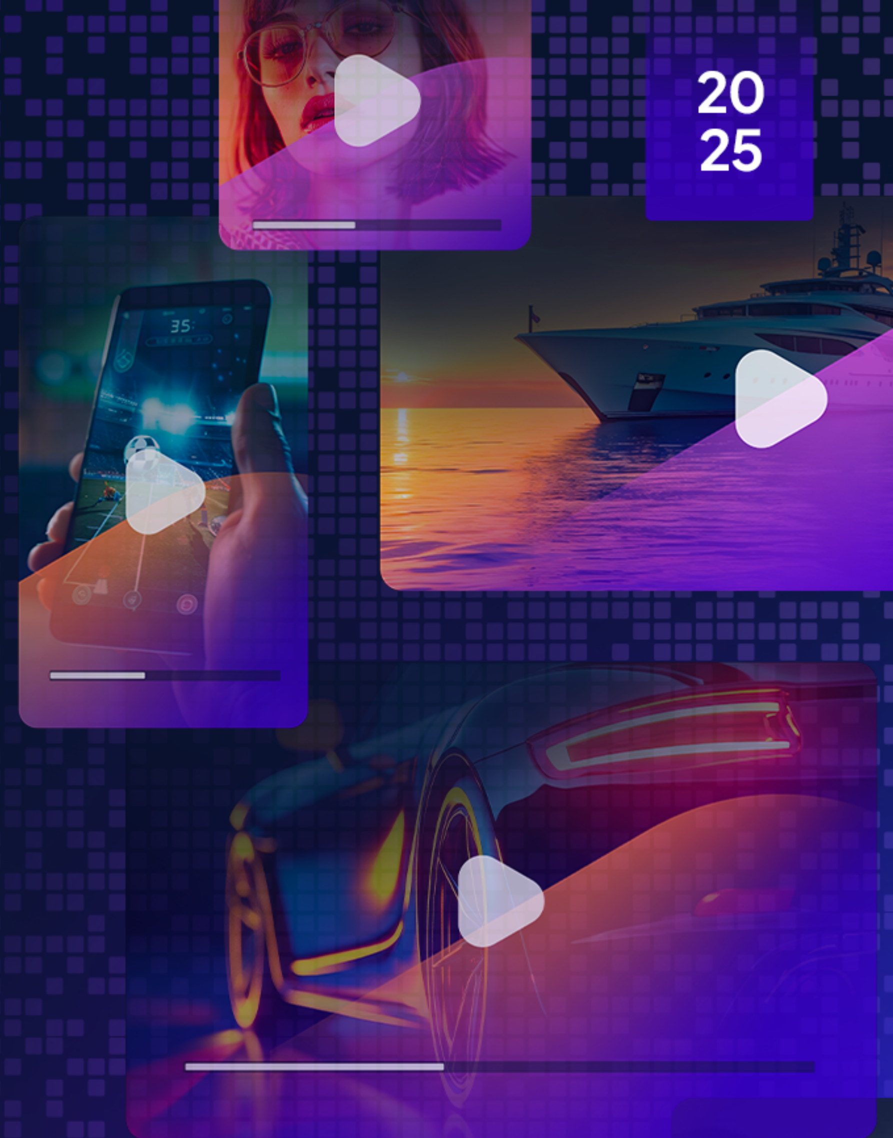
teads | MMA

State of *Video* & CTV

Senior marketers share the evolution of video in omnichannel strategies, and how it's reshaping creativity, targeting, and outcomes.



EXECUTIVE SUMMARY

The Expanding Role of Video *and What's Next*

Video has become indispensable in the marketing mix, cementing itself as both a brand storytelling engine and a performance driver. Insights from a July survey of over 100 senior U.S. marketers and agency buyers who are MMA members highlight its strategic versatility and growing importance. At the same time, executional challenges such as fragmented measurement and targeting inefficiencies continue to limit optimization.

As marketers push to maximize ROI, new approaches are emerging. First-party data and behavioral targeting are gaining ground, attention is rising as both a KPI and a currency, and creative workflows are transforming through in-housing and AI. These shifts point to a future where video will be not just a powerful medium but the connective tissue of omnichannel marketing.

KEY INSIGHTS

Five Themes *Defining* the State of Video

01

The Expanding Role of Marketing

Video sits at the center of the plan, not as an add-on. Nearly half call it the most essential tactic, another half put it alongside top tactics, and more than 9 in 10 will maintain or increase budgets.

02

Balancing Storytelling and Performance

Teams use video for brand building and performance in near-equal measure, yet true balance is rare. Storytelling remains core, performance pressure is real, and goals split almost evenly across performance focus, balanced mix, and brand-building.

03

Omnichannel Video Targeting Still Maturing Across Platforms

Most are still climbing the maturity curve, with only a small share at best-in-class. Fragmented platforms and data gaps make it difficult to scale video consistently across channels. Most are still climbing the maturity curve, with only a small share at best-in-class. Fragmented platforms, uneven targeting capabilities, cookie headwinds, and CTV frequency and addressability issues make scale and consistency hard to achieve.

04

Cross-Screen Marketing Measurement Challenges

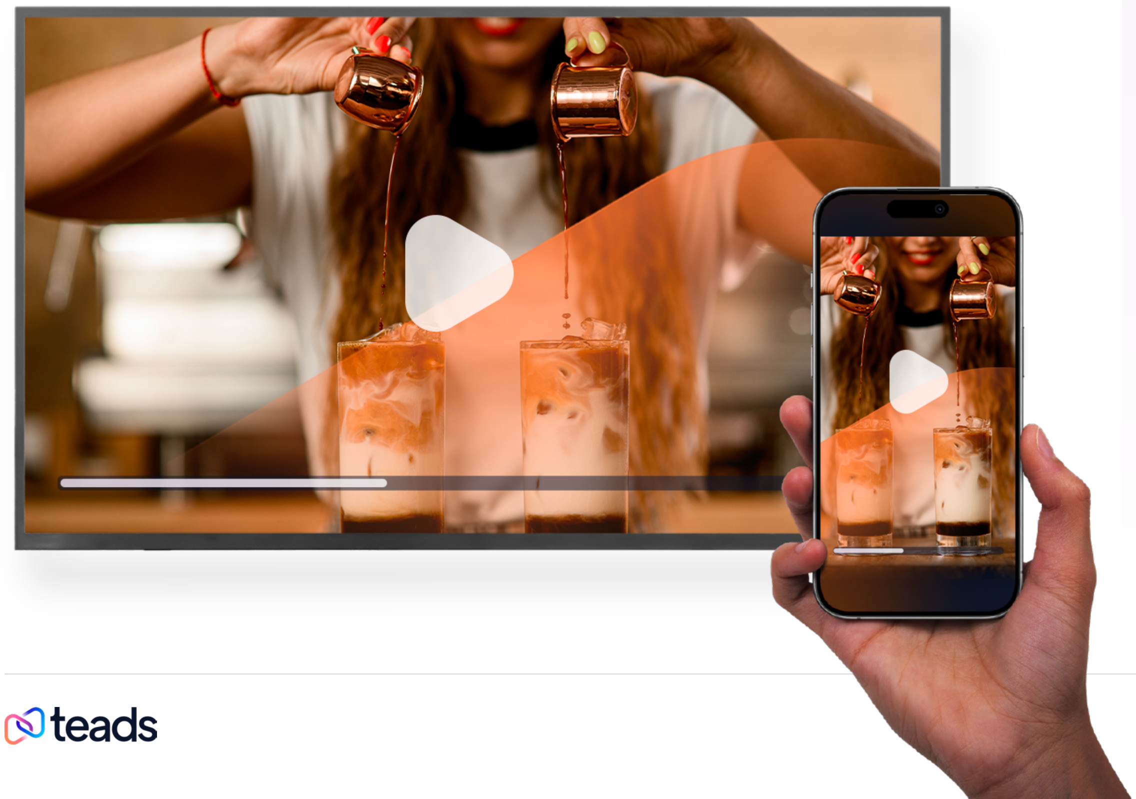
Proving value across screens remains a challenge. Marketers rely on incrementality tests, MMM, MTA, and brand lift to connect exposure to outcomes—but gaps persist in unifying cross-screen metrics. Attention is gaining traction as both a KPI and a potential buying signal.

05

Innovation is Reshaping the Future

Creative moves closer to the business with more in-housing and hybrid models. Automation speeds versioning, and generative AI is already in wide use for content creation, analysis, and optimization. The shift is toward faster adaptation, greater control, and creative that flexes across formats.

Marketers are transitioning from growth- focused strategies to transformational approaches, embracing video as essential while seeking to unlock its *full potential*.



Video has cemented its place as the centerpiece of modern marketing.
Budgets continue to rise, and adoption spans an expanding set of formats from online video and social to CTV and retail media. Marketers now treat video as the foundation for reaching audiences, building relevance, and driving business outcomes across every stage of the funnel.

This centrality comes with a dual mandate.
Video is expected to deliver both brand impact and measurable performance, making it one of the few channels capable of spanning the full customer journey. While marketers value its storytelling power, they are also under pressure to prove ROI, forcing them to balance creativity with accountability.

Execution, however, has not kept pace with ambition.
Audience targeting is fragmented by platform, cookie deprecation adds friction, and measurement gaps make it difficult to track outcomes consistently across screens. These challenges slow optimization and highlight the gap between video's potential and current practice.

Transformation is already underway.
Marketers are experimenting with new currencies, with attention emerging as a bridge between brand-building and performance. Creative processes are evolving through in-housing and AI-driven automation, offering faster adaptation and greater control. Together, these shifts point to a future where video is not just a powerful medium but the connective framework of omnichannel marketing.

NO. 1

The *Expanding* Role of Video

Video now sits at the center of the marketing mix, seen as a critical tactic rather than a secondary channel.

Investment is climbing, with marketers signaling steady budget growth to meet rising demand.

Emerging trends are reshaping strategy, with social commerce, short-form video, attention fragmentation, and CTV leading the way.

Formats are diversifying, with near-universal reliance on online and social video, and strong adoption of CTV across industries.

Retail Media and CTV instream are gaining traction as newer formats, especially in sectors like retail, finance, and CPG.

Video Takes *Centerstage* in the Marketing Mix

Marketers across sectors agree: video is no longer secondary, it's a cornerstone of growth.

50%
INCREASINGLY IMPORTANT but used alongside other key tactics

48%
Has become the MOST ESSENTIAL marketing tactic we use

2%
About the SAME IMPORTANCE as other marketing tactics

0%
LESS IMPORTANT than most other marketing tactics

0%
THE LEAST IMPORTANT marketing tactic we use

VERTICAL SPOTLIGHT

Answered: Video is INCREASINGLY IMPORTANT but used alongside other key tactics

100%
AGENCIES

Answered: Video Has become the MOST ESSENTIAL marketing tactic we use

64%
MANUFACTURING & INDUSTRIAL

59%
FINANCIAL & INSURANCE

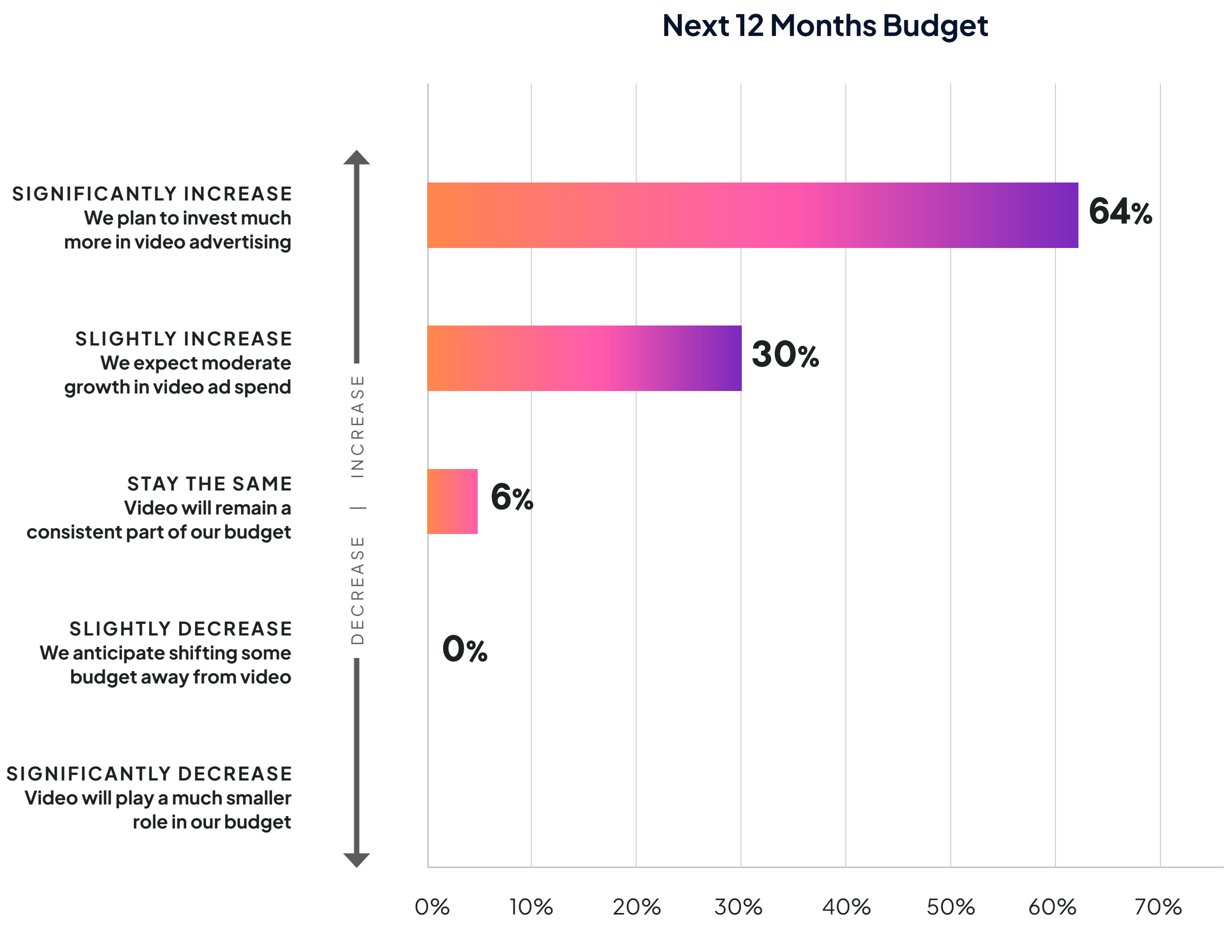
58%
RETAIL & E-COMMERCE

54%
HEALTHCARE & PHARMACEUTICALS

46%
CPG/ FMCG

Q10: How essential is video advertising to your overall marketing strategy compared to other marketing tactics

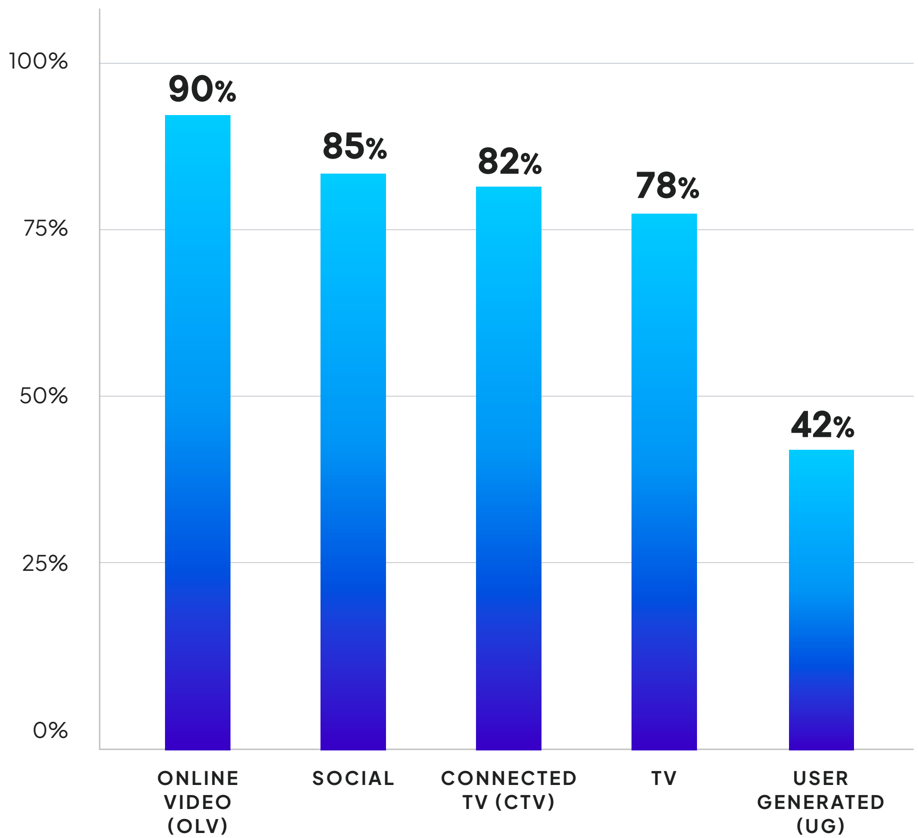
Video Investment Momentum Continues as *Marketers Plan Budget Increases*



Q13: How do you expect your budget of video advertising to change over the next 12 months? (Select one)

Video Formats Expand, But CTV *Holds Steady* Across Industries

Video Formats Used today



VERTICAL SPOTLIGHT

RETAIL & E-COMMERCE

96% CTV	100% OLV	54% UG	Retail leads in omnichannel video adoption, balancing premium reach with shopper-driven content.

FINANCIAL & INSURANCE

88% CTV	94% OLV	88% TV	Finance leans into premium video environments, with lowest reliance on user-generated due to compliance.

CPG/FMCG

77% CTV	92% OLV	92% SOCIAL	CPG maximizes household reach by balancing OLV and Social, while integrating CTV to extend scale.

HEALTHCARE & PHARMACEUTICALS

85% CTV	85% OLV	85% SOCIAL	Healthcare splits evenly across digital channels, with lower traditional TV reliance but strong digital spread.

MANUFACTURING & INDUSTRIAL

82% CTV	100% OLV	91% SOCIAL	Manufacturing puts OLV at the core, complements with Social, and steadily grows into CTV.

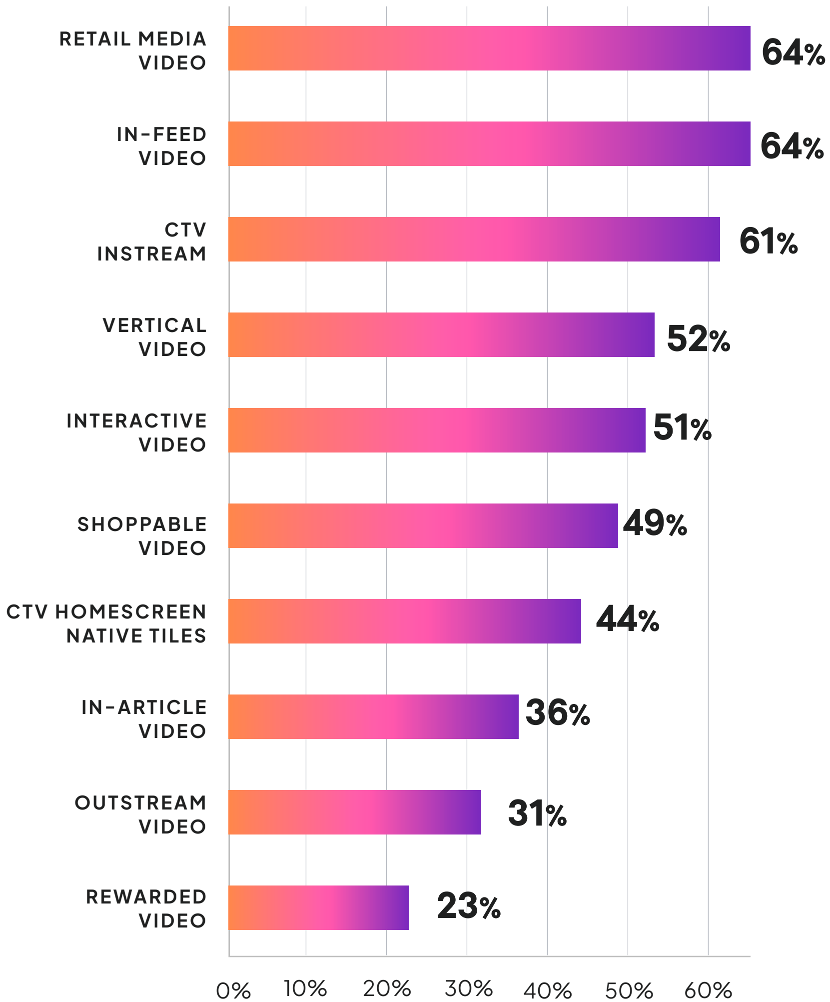
AGENCIES

100% CTV	100% OLV	100% SOCIAL	Agencies adopt all major formats to match client demand, but avoid user-generated for campaigns.

Q8: What forms of video marketing does your organization primarily execute?

Marketers Embrace *Diverse Video Formats* with Retail Media Leading Adoptions

Adoption of Video Marketing Formats



VERTICAL SPOTLIGHT

64% RETAIL MEDIA VIDEO — Top Users: **83%** Retail & E-Commerce | **77%** CPG/ FMCG

61% CTV INSTREAM — Top Users: **71%** Retail & E-Commerce | **71%** Financial & Insurance | **69%** Healthcare & Pharmaceuticals

44% CTV HOMESCREEN — Top Users: **53%** Financial & Insurance | **50%** Retail & E-Commerce

52% VERTICAL VIDEO — Top Users: **62%** CPG/ FMCG | **64%** Manufacturing & Industrial

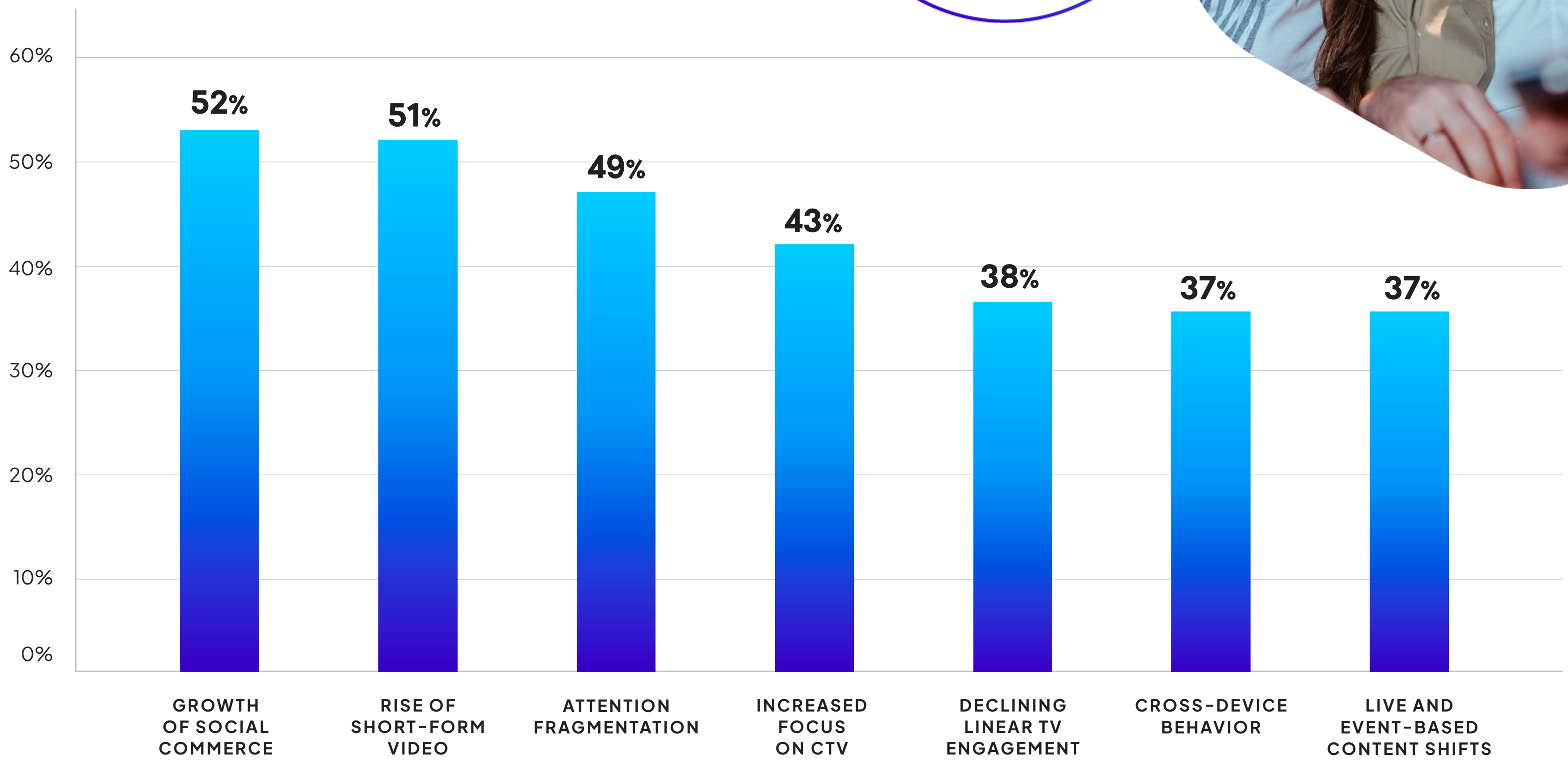
49% SHOPPABLE VIDEO — Top Users: **62%** CPG/ FMCG

31% OUSTREAM VIDEO — Top Users: **46%** Retail & E-Commerce | **31%** CPG/ FMCG

Q11: Which of the following video formats or placements are of most interest to your team right now?

Multiple Trends are *Shaping Video Advertising*

Biggest Trends Next 12 Months



Q36: What is the biggest trend shaping video advertising in the next 12 months? (Select all that apply) N=102 Senior Marketers

NO. 2

Video Plays a Dual Role: *Storytelling and Performance*

Video remains central to brand awareness and storytelling, but execution often prioritizes performance outcomes like sales and conversions.

Marketers are seeking a balance between brand and performance, yet many still tilt toward performance-driven metrics.

The KPIs used to measure success reflect this duality, spanning viewability and engagement to sales and brand lift.

A gap persists between video’s perceived role as a brand channel and its practical use as a performance driver.

Most Marketers are Still Building an *Omnichannel Maturity*

Maturity of Omnichannel Video Strategies

40%
DEVELOPING
Some integration but challenges with data, measurement, or creative consistency

30%
ADVANCED
Coordinated strategy with automation and audience targeting

22%
EMERGING
Testing cross-channel strategies but lack unified execution

5%
BEST-IN-CLASS
Fully optimized, real-time measurement, unified audience data, dynamic creative

3%
BASIC
Siloed campaigns with minimal cross-channel coordination

Omnichannel Video Strategies
Few have reached best-in-class execution, with the majority still operating in developing or advanced stages.

VERTICAL SPOTLIGHT

Answered: DEVELOPING

- **100%** AGENCIES
- **62%** HEALTHCARE & PHARMACEUTICALS
- **39%** CPG/ FMCG
- **36%** MANUFACTURING & INDUSTRIAL

Answered: AVANCED

- **62%** RETAIL & E-COMMERCE
- **67%** TELECOM & TECHNOLOGY

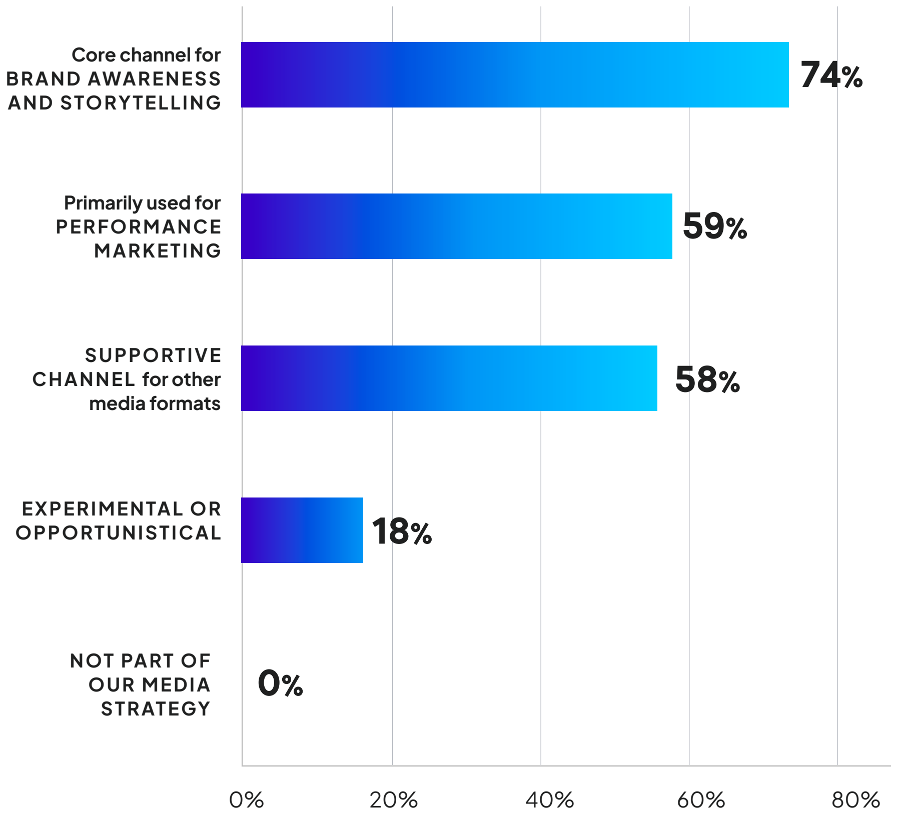
Answered: EMERGING

- **41%** FINANCIAL & INSURANCE

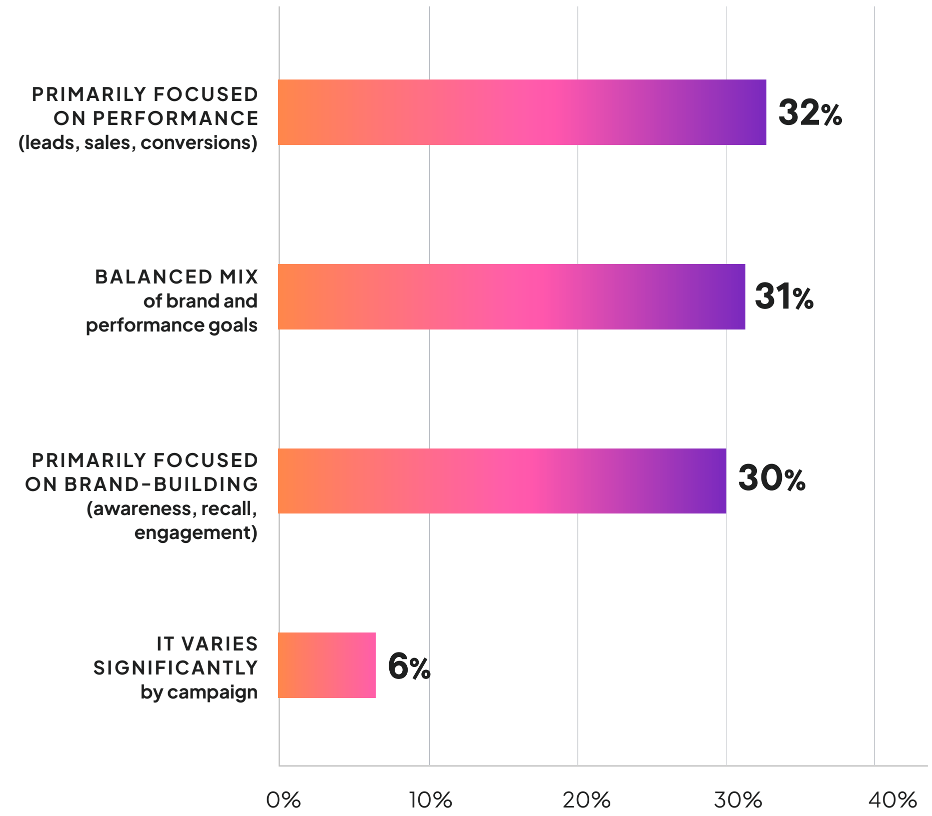
Q25: How would you describe your organization's maturity in executing an omnichannel video strategy? (Select one). N=102 Senior Marketers

Video is Still Seen as a Storytelling Channel, Yet A Lot of Marketers Use it Primarily *for Performance*

Role of Video



Goals



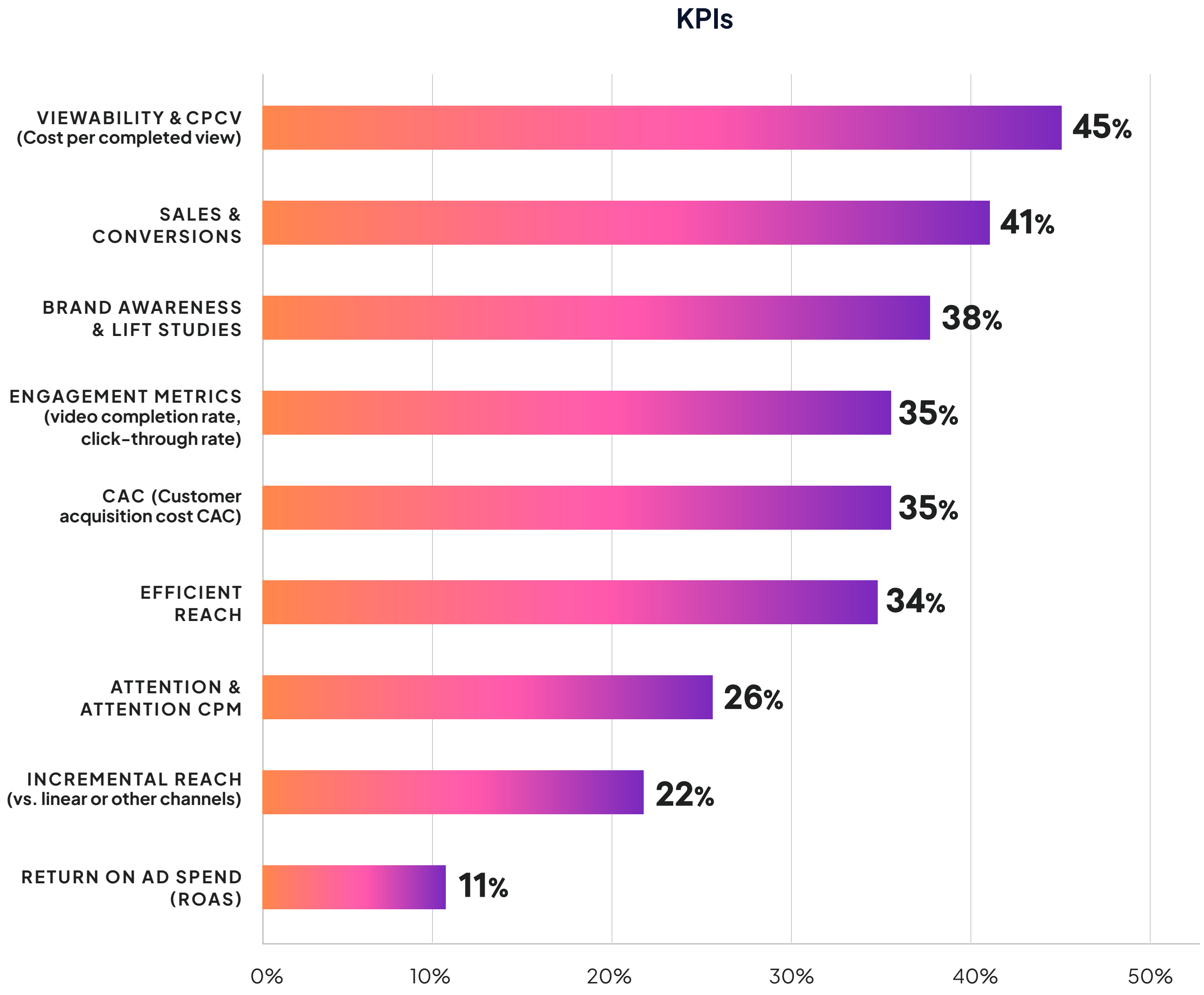
Q12: Which of the following best describes the role of video advertising in your brand's media strategy? (Select all that apply)
Q27: How does your team balance brand-building and performance-driven goals in video advertising? (Select one)
N=102 Senior Marketers

Video Goals Vary Sharply *by Industry*

Industry	Summary	Primarily Performance	Brand-Building	Varies by Campaign	Balanced Mix
RETAIL & E-COMMERCE	Retail skews toward balanced strategies, but performance remains important.	29%	21%	8%	42%
FINANCIAL & INSURANCE	Finance is fragmented — performance slightly ahead, but brand-building remains strong.	35%	29%	6%	29%
CPG/FMCG	CPG splits between balanced and performance, with some still brand-led.	39%	15%	8%	39%
HEALTHCARE & PHARMACEUTICALS	Healthcare is evenly split across balanced, performance, and brand-building.	31%	31%	0%	38%
MANUFACTURING & INDUSTRIAL	Manufacturing leans toward balanced strategies, with a sizable performance focus.	29%	21%	8%	42%
TELECOM & TECHNOLOGY	Telecom is underdeveloped, with no clear dominant goal yet.	33%	33%	0%	33%

Q27: How does your team balance brand-building and performance-driven goals in video advertising?
(Select one) N=102 Senior Marketers

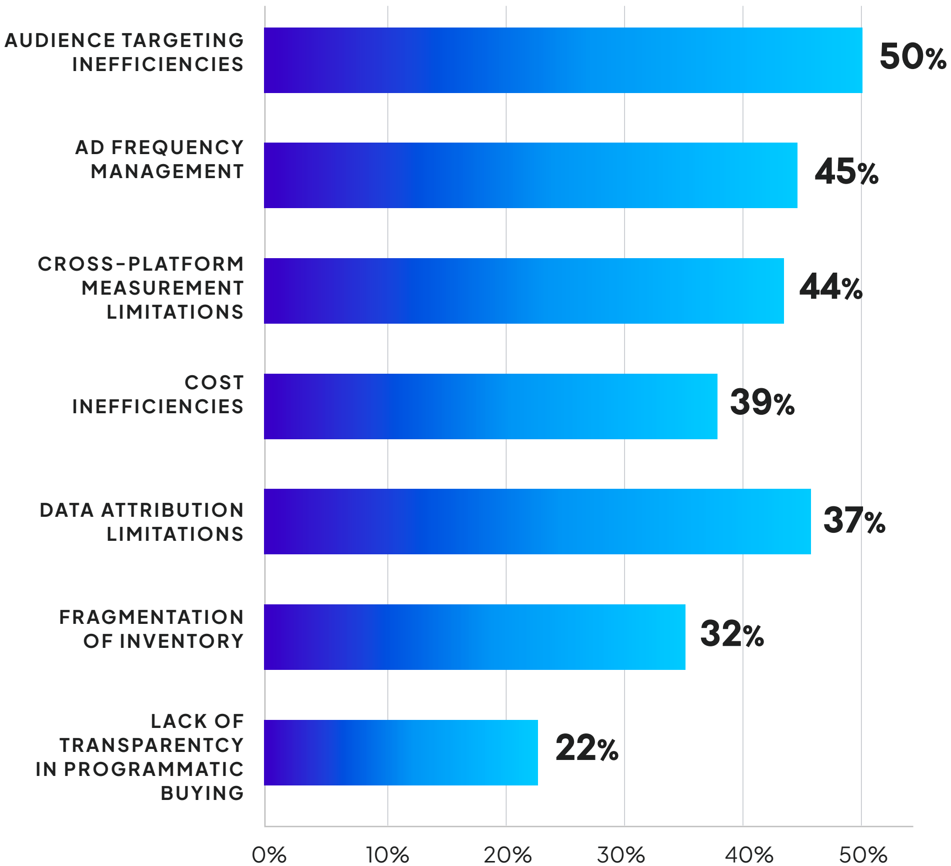
KPIs Reflect Both Performance *and Brand Goals*



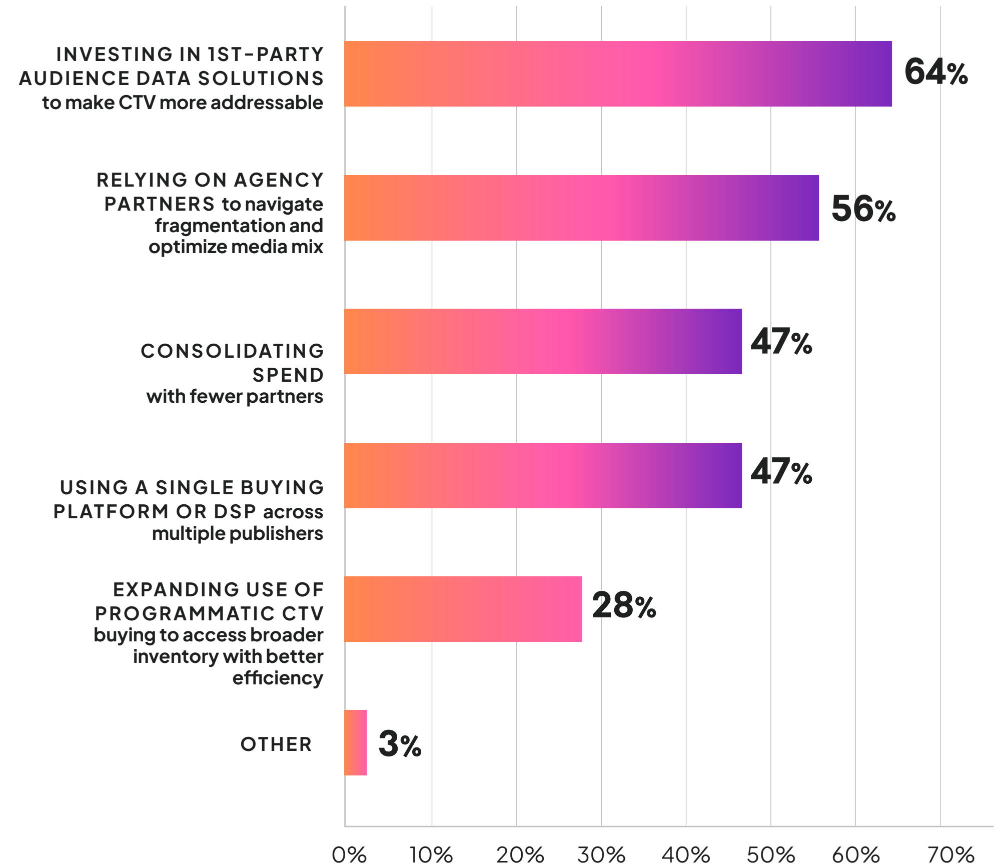
Q28: What are your top KPIs for measuring video advertising success? (Select up to three). N=102 Senior Marketers

CTV Brings the *Promise of Advanced Targeting,* But That's Also Its Main Challenge (Along with Frequency Cap)

Key CTV Challenges



Key Solutions



Q20: What are the biggest challenges your team faces in CTV advertising today? (Select up to three)
Q21: How is your team managing the challenges of CTV inventory fragmentation? (Select all that apply)
N=102 Senior Marketers

NO. 3

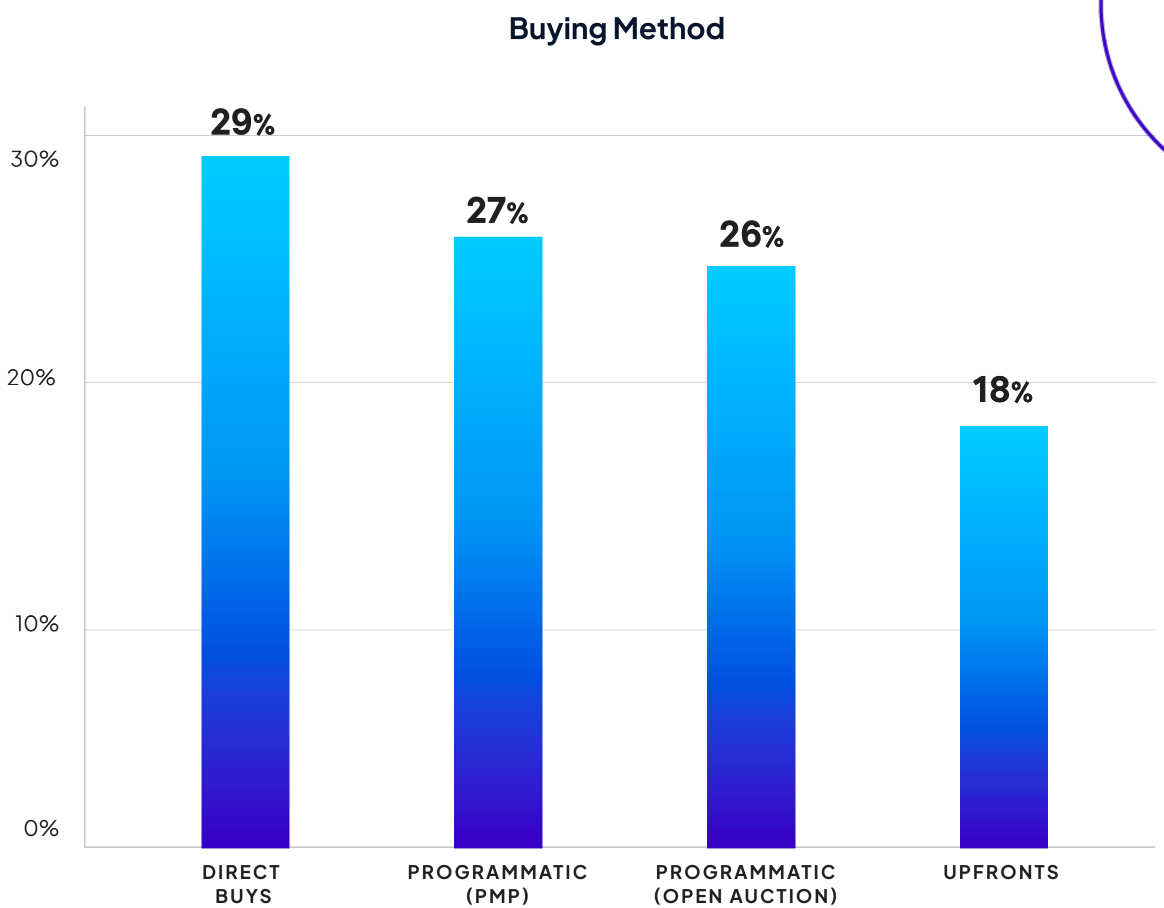
Omnichannel Video Targeting Still Maturing *Across Platforms*

Budget allocation, creative adaptation, and lack of unified measurement are the top challenges, limiting optimization across screens.

Most marketers develop separate strategies for each platform, leaning heavily on first-party and behavioral data.

Cookie deprecation, limited first-party data, and inconsistent targeting capabilities across platforms continue to create friction.

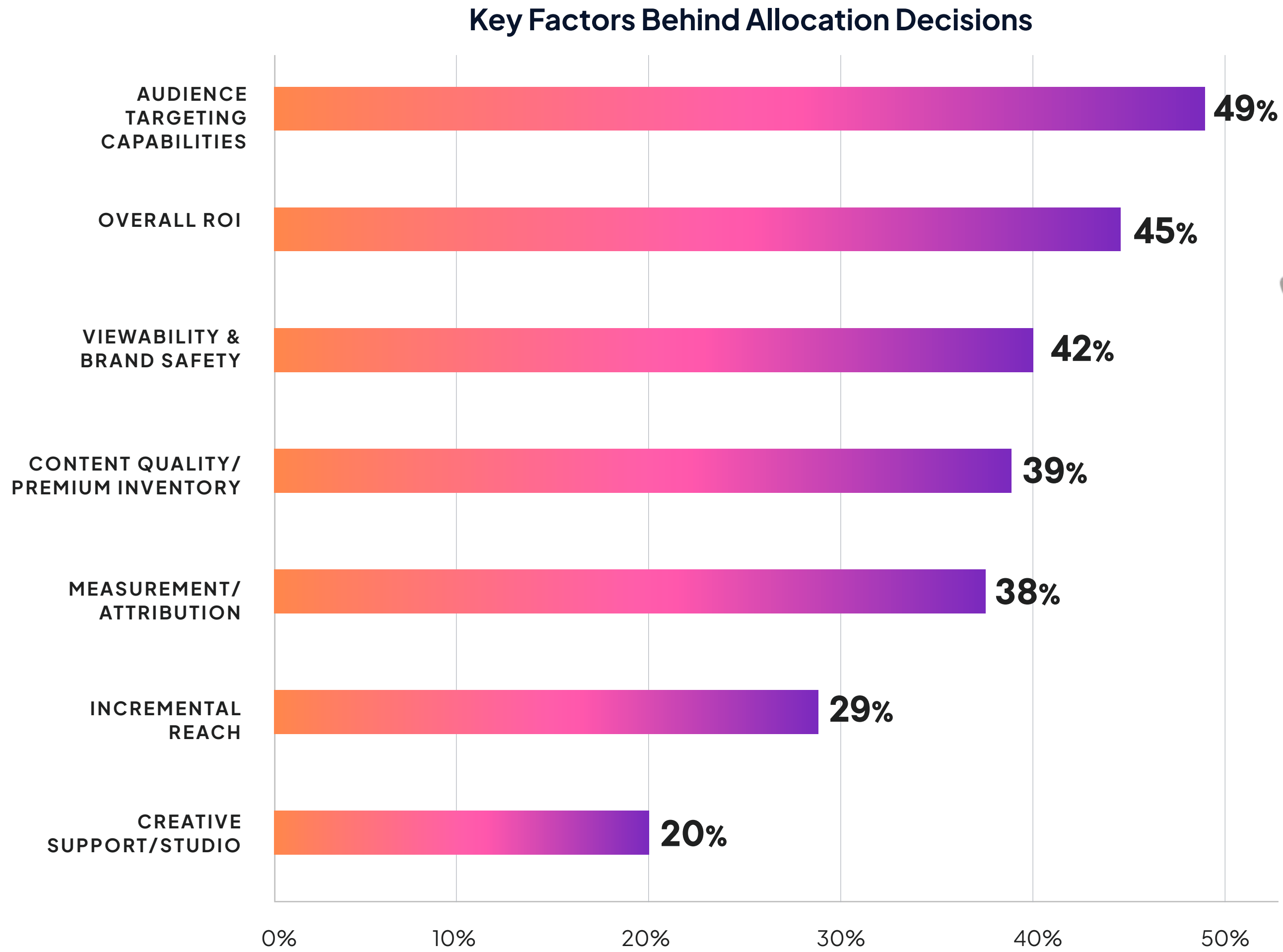
Although Direct Buys are Still Common, a Big Share of Video Dollars *Go Through Programmatic*



Buying Method Split
Video budgets remain diversified, but programmatic is now a clear force. Direct buys continue to play a big role, while private marketplaces and open auctions together account for the majority of programmatic spend. Upfronts play a smaller role, reflecting the shift toward more flexible and data-driven buying strategies.

Q14: How do you allocate your video advertising budget across the following buying methods? (Enter percentage allocations, total must equal 100%)
N=102 Senior Marketers

Video Decisions are Primarily ROI/ Outcomes Driven, with Audience Capabilities Being a *Key Consideration*



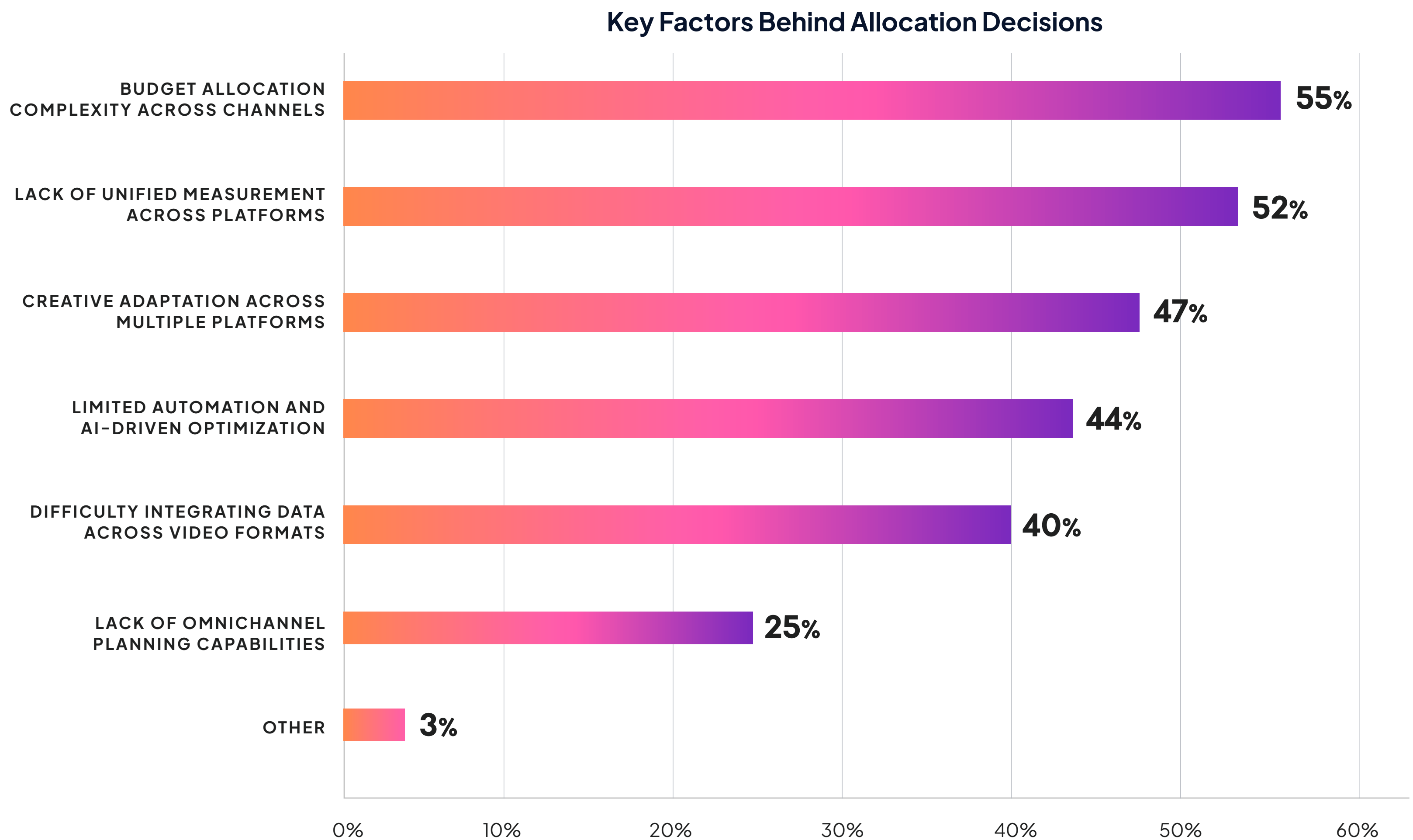
Q15: When deciding how to spend your video advertising budget, which of these factors matter most to you?
(Scale from 1 = Not at all important to 5 = Extremely important)
N=102 Senior Marketers

OLV and Social are *Perceived to Have Higher ROI*, Although No Winner Emerges in Measurement and Attribution

"EXCELLENT" RATINGS	LINEAR	CTV	OLV	SOCIAL
INCREMENTAL REACH	25%	31%	42%	33%
VIEWABILITY & BRAND SAFETY	36%	40%	19%	36%
CONTENT QUALITY / PREMIUM INVENTORY	32%	38%	29%	28%
AUDIENCE TARGETING CAPABILITIES	23%	38%	37%	44%
MEASUREMENT/ ATTRIBUTION	32%	30%	27%	33%
OVERALL ROI	23%	30%	37%	38%
VALUE PROPOSITION FOR MARKETERS	Safe, viewable, premium and measurable	Safe, premium & targetable	Incremental reach, targetable and good ROI	Viewable, targetable with good measurement & ROI

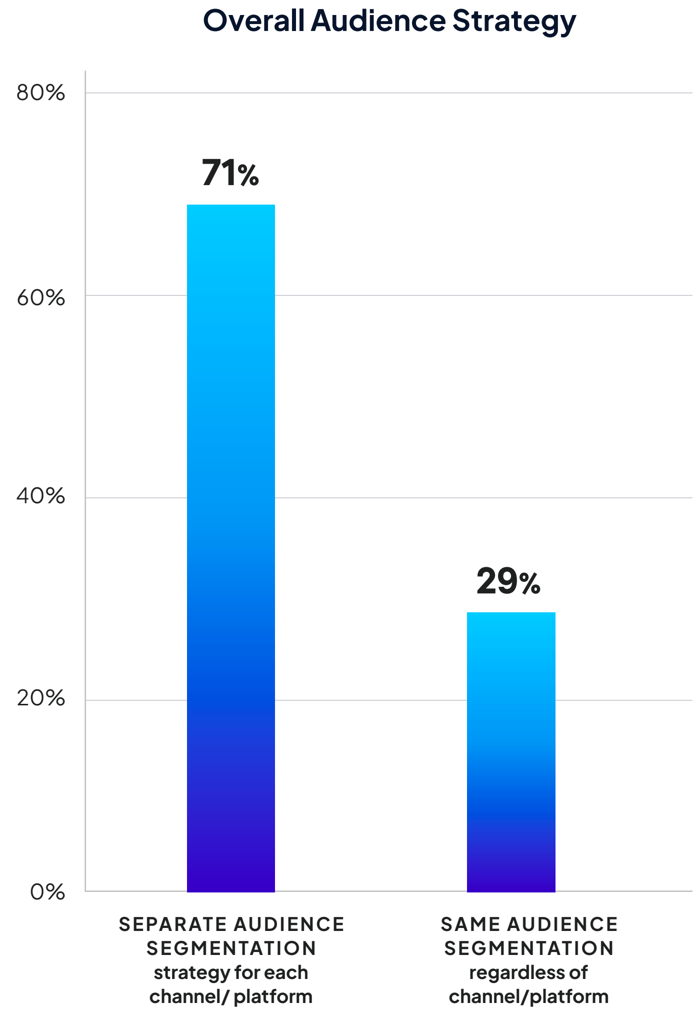
How well do the following video channels perform on these same factors?
(Rate each from 1–5, where 1 = Poor, 5 = Excellent) N=102 Senior Marketers

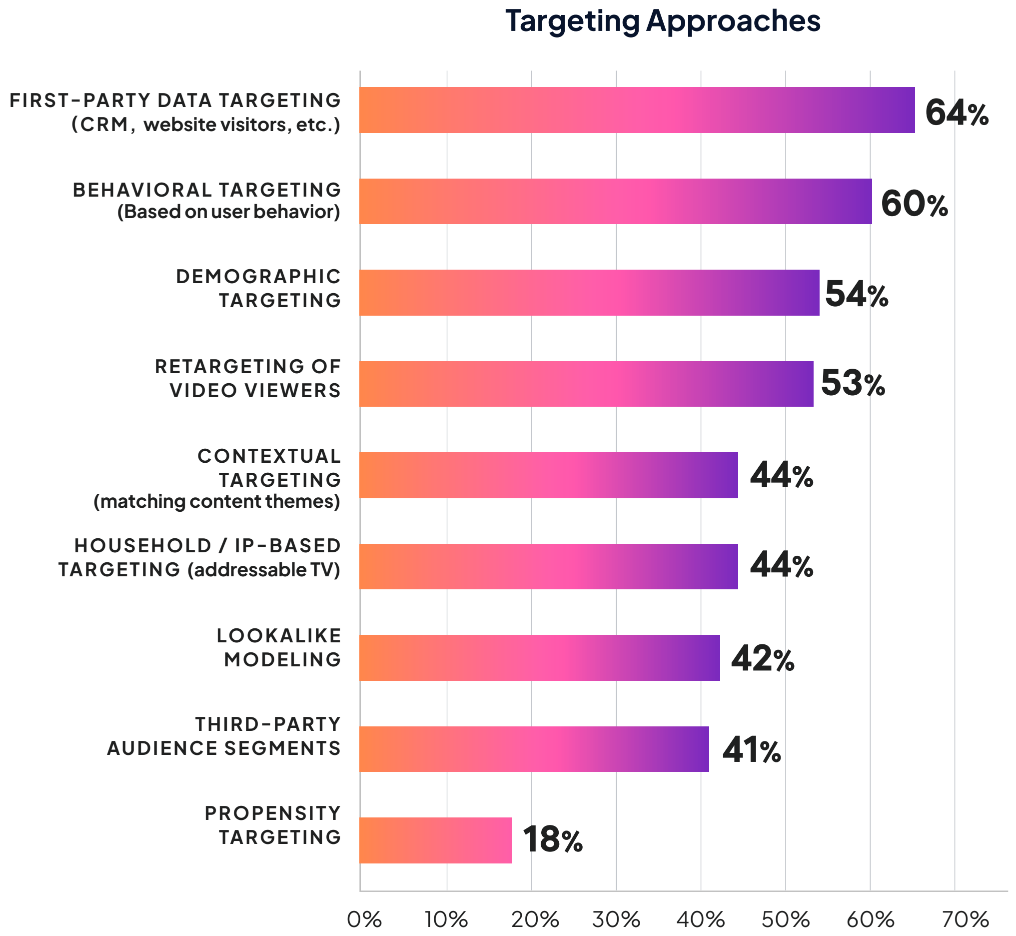
Budget Silos and Measurement Gaps
Limit Omnichannel Success



Q26: What are your biggest challenges in achieving a fully optimized omnichannel video strategy?
N=102 Senior Marketers

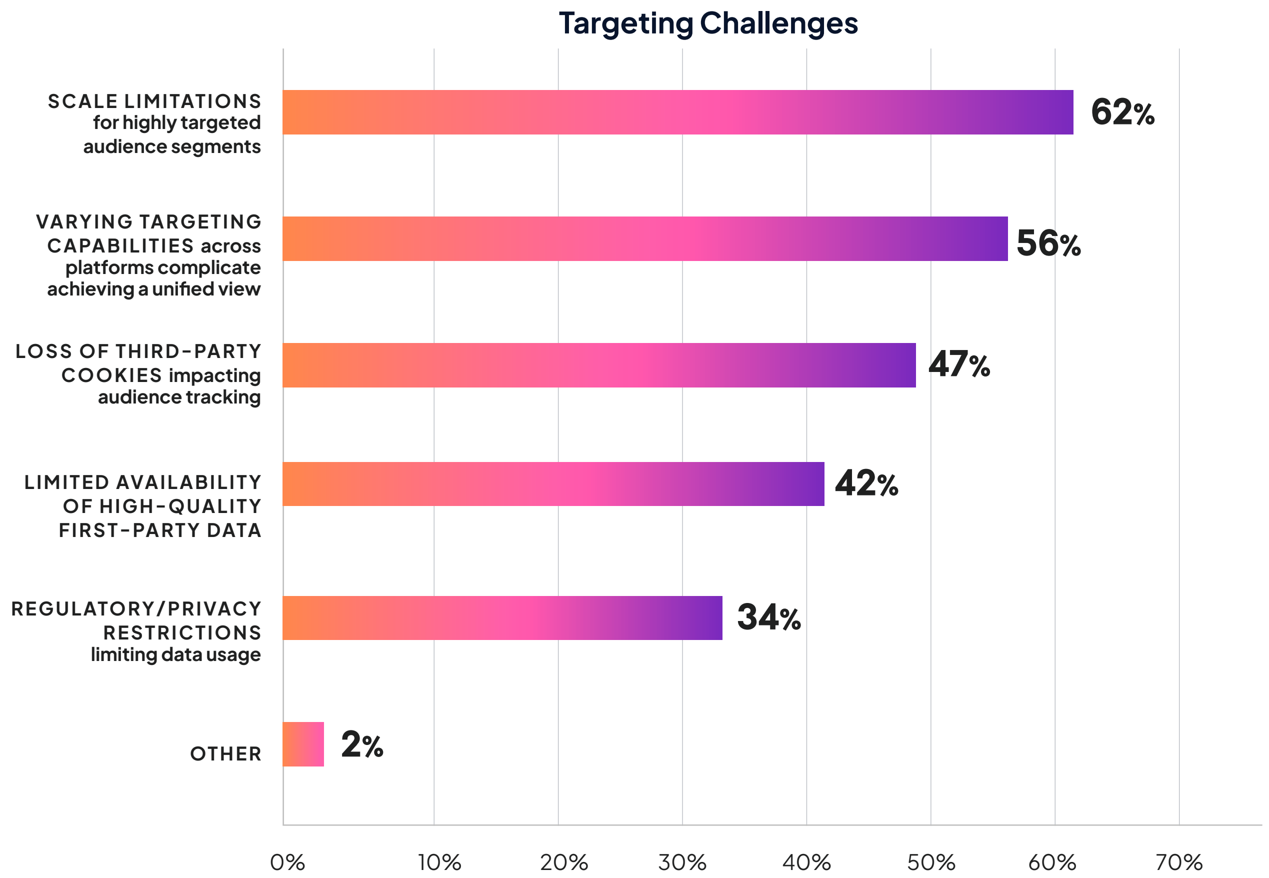
Platform-Specific Audience Strategies Prioritize First-Party *and Behavioral Data*





Q24: Which best describes your typical audience strategy for video marketing? (Select one)
Q22: Which audience targeting approaches do you currently use for video advertising?

Targeting *Challenges* Limit Scale and Consistency



Audience Targeting Difficulties
Marketers face mounting challenges in audience targeting, with scale limitations and inconsistent platform capabilities making unified strategies difficult to execute. The deprecation of third-party cookies and restricted access to quality first-party data add further pressure, while privacy regulations tighten the scope of data usage. These hurdles underscore the need for more flexible, privacy-safe approaches that can deliver both reach and precision.

Q23: What are the biggest challenges in video audience targeting today? (Select up to three)
N=102 Senior Marketers

NO. 4

Cross-Screen Marketing Measurement *Challenges*

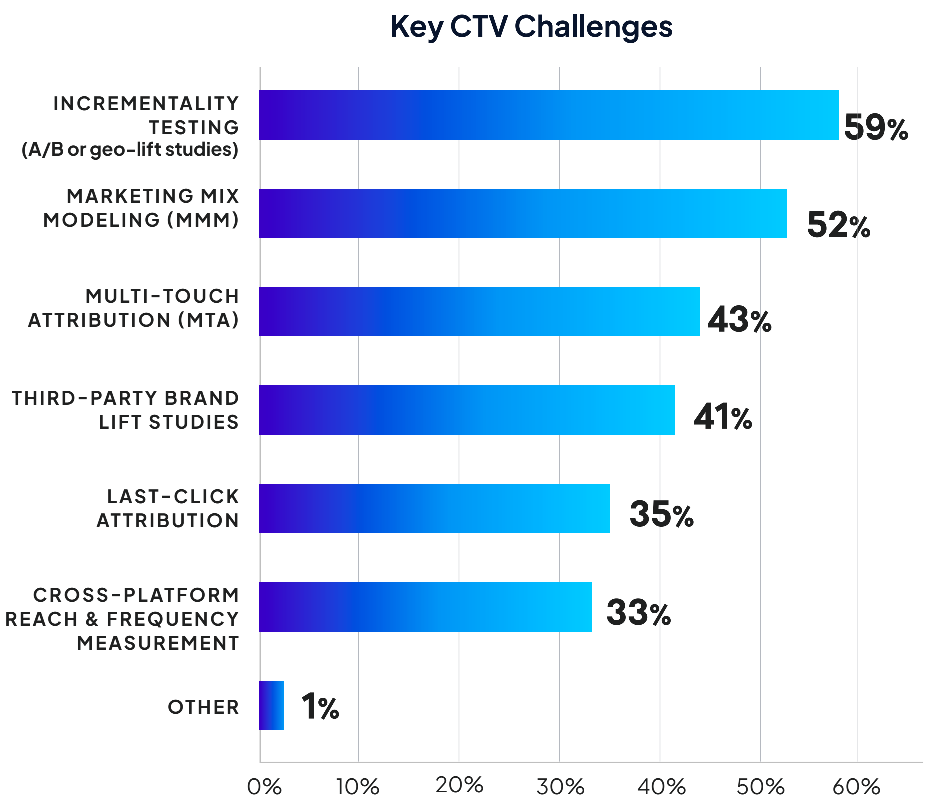
Measurement is fragmented, with marketers relying on MMM, experiments, and platform reporting — but struggling to connect the dots across screens.

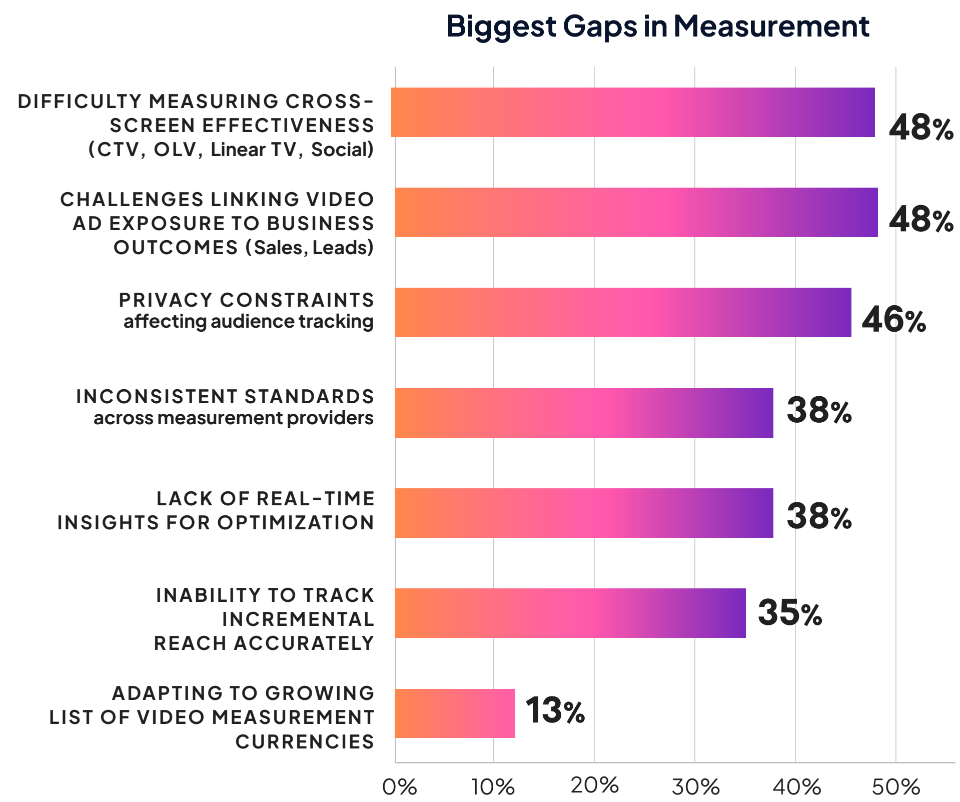
Gaps persist in proving ROI, as privacy restrictions, attribution hurdles, and lack of real-time optimization limit accountability.

Alternative currencies are being tested, signaling a shift away from legacy models.

Attention is gaining traction as both a KPI and a potential buying currency, bridging brand and performance metrics.

Measurement Tools *Gain Traction*, but Gaps Persist Across Screens





Q29: Which measurement approaches do you use to assess video advertising performance? (Select all that apply)
Q30: What are the biggest gaps in video measurement today? (Select up to three). N=102 Senior Marketers

Marketers Test New Currencies as Attention *Gains Momentum*

Key CTV Challenges

54%
USE A MIX of traditional and alternative measurement providers

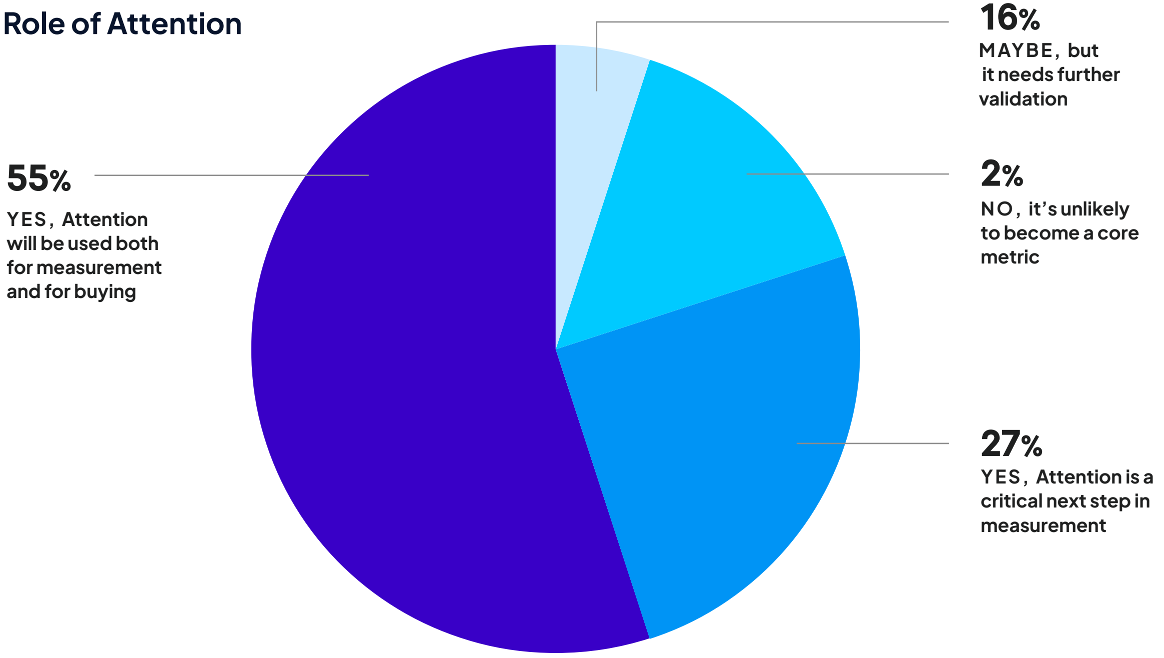
47%
ACTIVELY TESTING Alternative currencies (e.g., VideoAmp, Comscore)

40%
SHIFTING toward attention-based metrics as a core KPI providers

23% RELY PRIMARY ON NIELSEN as our main currecny

10% NOT YET EXPLORED Alternative currencies

Role of Attention



Marketers are Moving Beyond Legacy Providers
With many marketers testing alternative currencies like VideoAmp and Comscore while also exploring attention-based metrics as core KPIs. Nielsen remains in use, but reliance is shifting as teams look for more flexible and accountable solutions. Attention is emerging as a leading candidate, with most marketers believing it will shape both measurement and buying decisions.

Q31: How is your team adapting to alternative video measurement currencies? (Select all that apply)
Q32: Do you believe attention-based metrics will become a standard in video advertising measurement? (Select one)
N=102 Senior Marketers

NO. 5

Innovation is *Reshaping* the Future

Creative responsibilities are shifting in-house or to hybrid models, as marketers look for greater control and agility in adapting video.

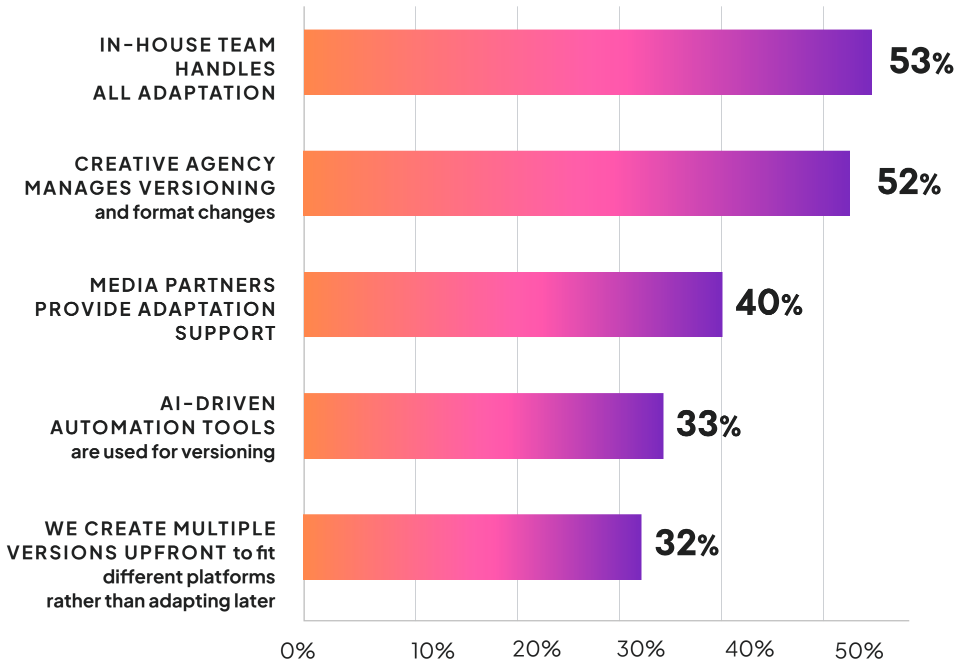
Agencies and media partners still play a role, particularly for scaling versioning and format changes.

AI-driven automation is becoming a key support for adaptation, powering faster versioning and optimization.

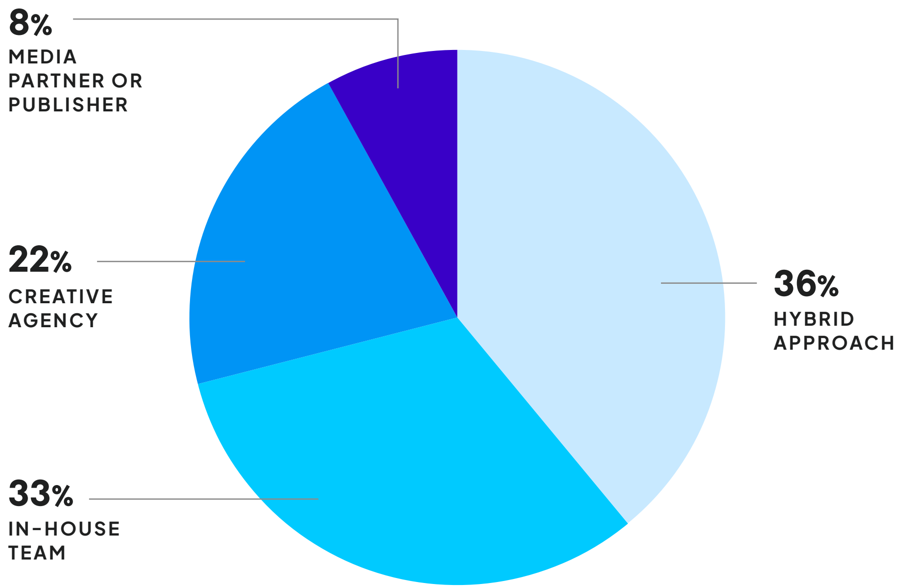
Generative AI stands out as the most influential tool for creative, fueling everything from content production and voiceovers to performance analysis and audience insights.

Creative Production Shifts Toward In-House and Hybrid Models

Biggest Gaps in Measurement



In-House Team Handles All Adaptation

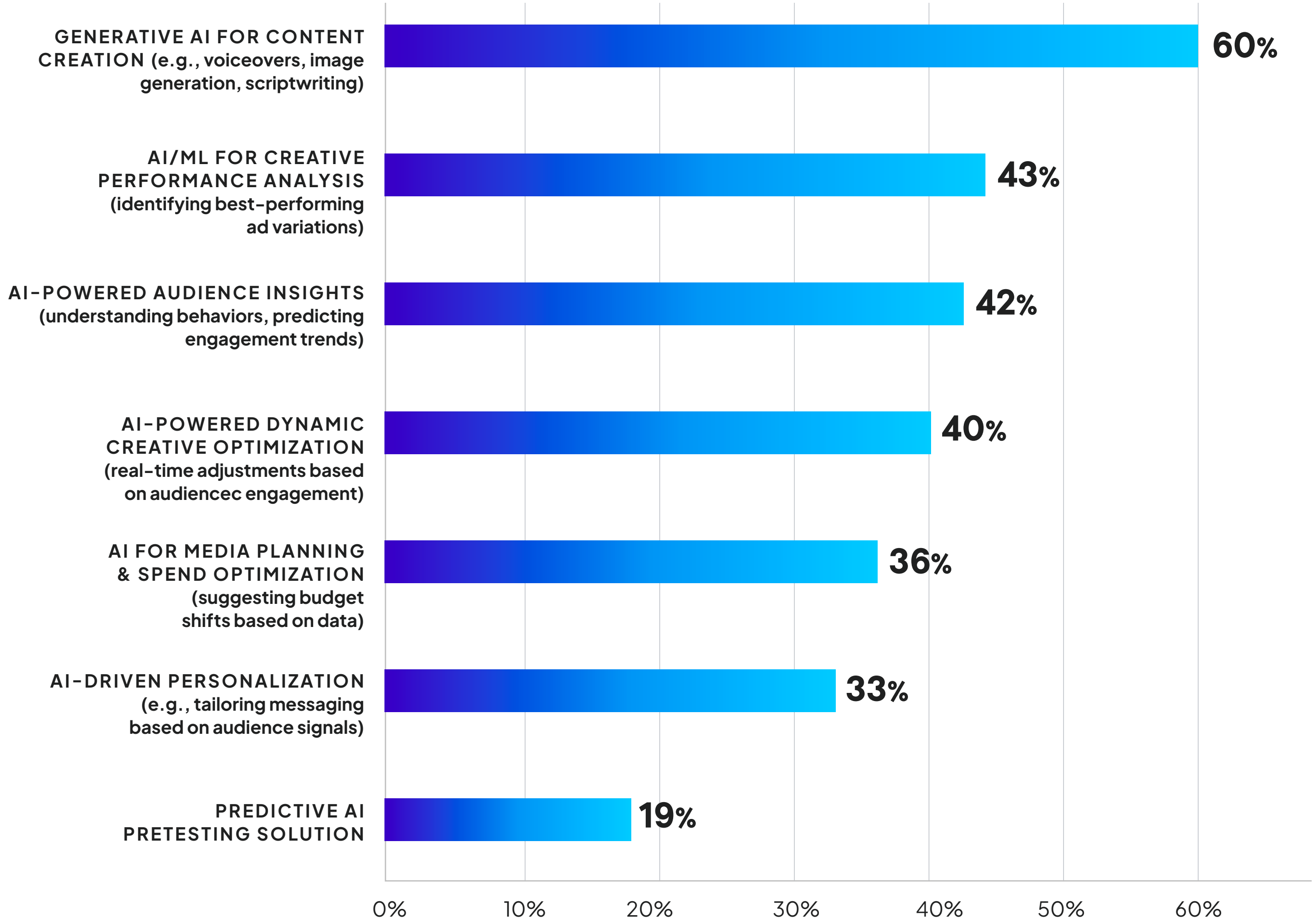


Marketers are increasingly moving creative development and adaptation in-house, with many adopting hybrid models that balance internal teams and external partners. While creative agencies still play a role in versioning and format changes, in-house teams are taking on more responsibility for original production and adaptation. Automation and upfront multi-versioning are also gaining traction, signaling a push for greater control, speed, and efficiency in creative workflows.

Q33: Who is primarily responsible for developing original video ad creative for your campaigns? (Select one)
Q34: How do you typically handle versioning, resizing, and adapting existing video creative for different platforms? (Select all that apply)
N=102 Senior Marketers

AI Emerges as a Creative and *Strategic Force* in Video

Role of AI



Q35: How is AI influencing your video advertising and creative strategy? (Select all that apply)
N=102 Senior Marketers

Generative AI is leading the way, with marketers using it for voiceovers, image generation, and scriptwriting to speed up content creation. Beyond production, AI and machine learning are reshaping performance analysis, audience insights, and dynamic creative optimization, enabling real-time adjustments. While predictive AI applications are still early, the growing adoption signals a major shift in how video is created, personalized, and optimized.

↘ Teads *Solution*

Teads: The Leader in *Simplified Omnichannel* Video Storytelling

Teads connects brands with premium audiences through an omnichannel platform, maximizing reach and cost-efficiency across video, digital, and CTV.

InRead Video

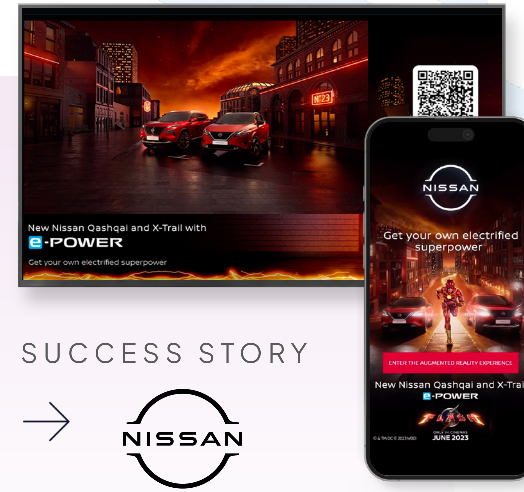
InRead video places ads natively within premium editorial content, playing only when in view for a non-intrusive experience, and supports reusing social extensions or vertical video assets for effortless cross-platform campaigns.

SUCCESS STORY

→ OAKLEY

CTV HomeScreen

Teads' CTV HomeScreen provides seamless homescreen ad experiences, reaching non- ad-supported audiences on premium OEMs through impactful homepage takeover units. This solution ensures high visibility and engages audiences in a premium, brand-safe environment.



SUCCESS STORY

→ NISSAN

CTV Video

CTV video delivers premium, non-skippable ads across streaming and smart TV environments, and with CTV Traffic advertisers can track site visits, leads, and sales directly tied to CTV exposure for measurable mid-funnel impact.

SUCCESS STORY

→ Cartier

Teads *Solution*

High-Attention Formats *Driving Outcome*

Campaigns optimized for attention deliver measurable improvements in key outcomes such as awareness, consideration, and conversion—performing nearly three times better than traditional viewability metrics.

55%

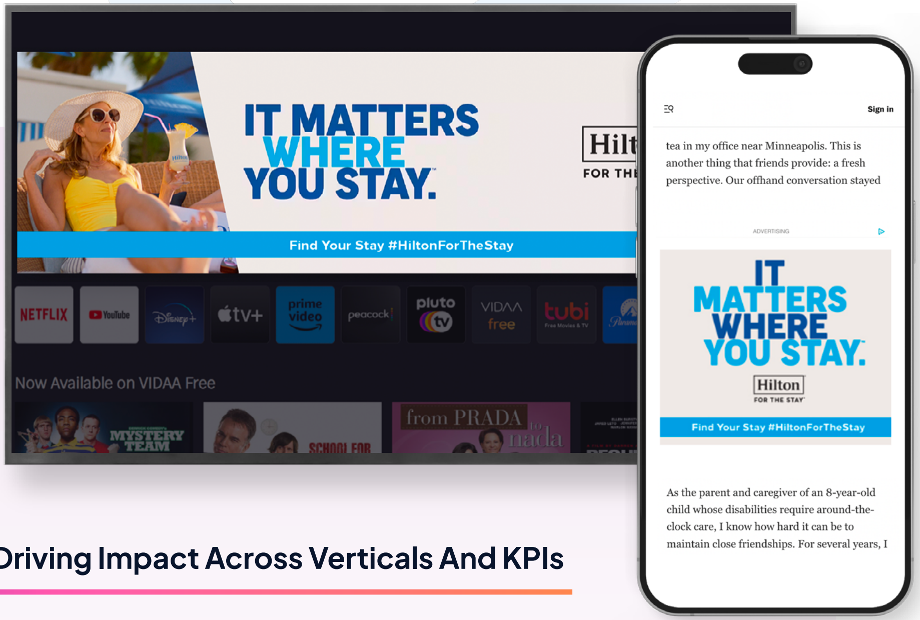
HIGHER BRAND AWARENESS Acompared ot Lucid benchmarks across omnichannel campaigns[1]

40%

HIGHER UPPER -FUNNEL PERFORMANCE FOR CTV compared to Lucid's omnichannel benchmarks for CTV[1]

SUCCESS STORY

→ Hilton



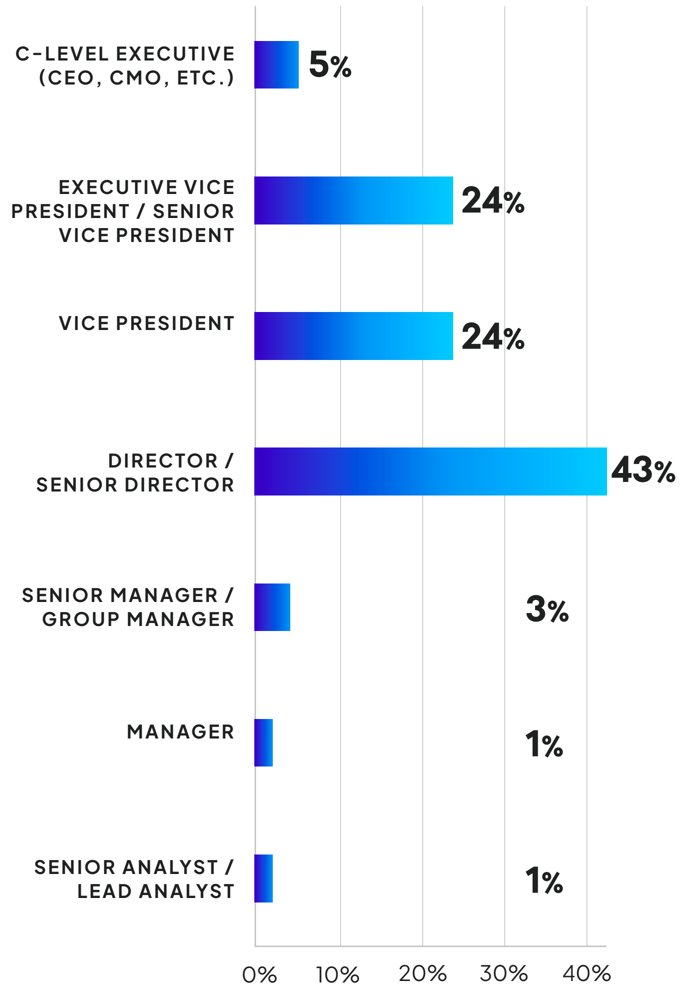
Omnichannel Campaigns Driving Impact Across Verticals And KPIs

STREAMING PLATFORM: Subscription intent[2]	AUTO BRAND: Brand Awareness[3]	HEALTHCARE BRAND Familiarity[3]
7.4% Lift	7% Lift	3% Lift

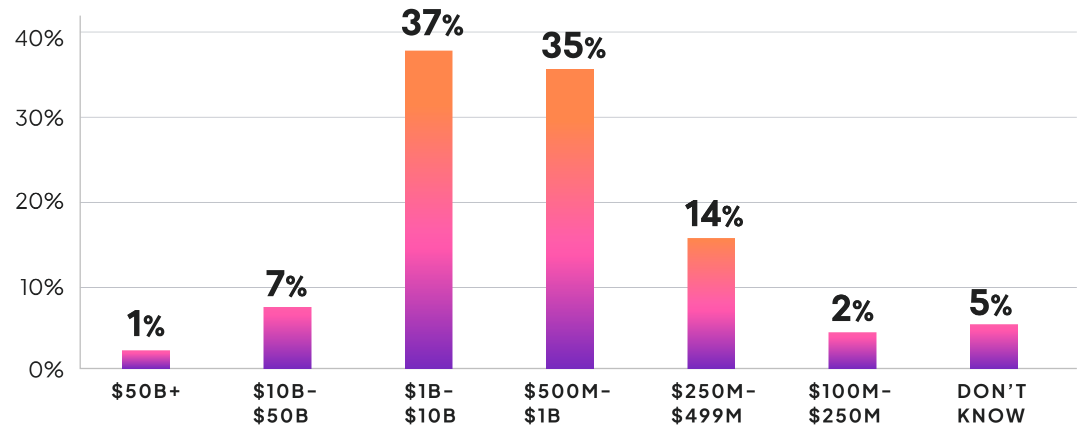
1- Teads vs. Lucid Benchmark Norms, December 2024
2 - Kantar, 2023
3 - DISQO, 2023

Study Participant *Firmographics*

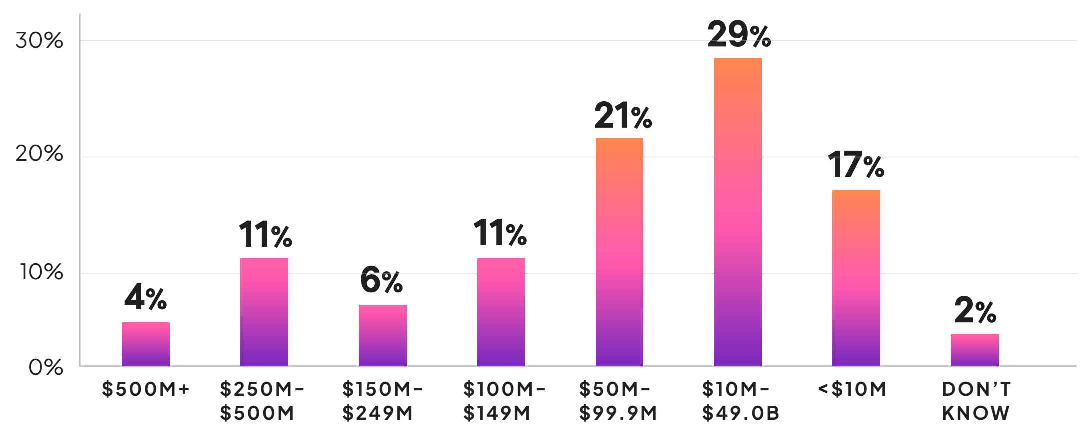
Roles/Titles



Company Revenue



Company's Media Budget



Q7: Which best describes your current title/level within your organization?
Q4: To the best of your knowledge, what was your company's 2024 reported annual gross revenue? (in US Dollars)
Q42: To the best of your knowledge, what was your company's 2024 media budget? N=102 Senior Marketers

Work With A *Trusted* Partner

Teads solves this with one omnichannel platform that combines premium inventory, intelligent targeting, and creative optimization to help brands own the screen and drive measurable outcomes from awareness to action.

Engage audiences across CTV, mobile, vertical, and social video through a single seamless platform powered by Teads Ad Manager.

Reach 2.2 billion consumers on every screen. From the biggest TV to the heart of the scroll, Teads delivers guaranteed attention.

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