



State of Video & CTV

Annual Marketer Survey

June 2025

Foreword

As marketing continues to evolve in a media-saturated world, video stands at the forefront of this transformation, shifting from a linear storytelling tool to a key element of an outcomes focused, omnichannel marketing strategy.

The inaugural State of Video survey reveals a compelling narrative and tension point: marketers understand the power of video but are still navigating the operational complexity of deploying it at scale in a world that is being disrupted by AI.

MMA Global remains committed to equipping marketing leaders with the tools, benchmarks, and peer-driven insights needed to increase marketers' ability to deliver value. This report is a step in that direction, offering a clear-eyed view into where we are today—and where we must go next.



Executive Summary

Video has evolved into a strategic powerhouse within the marketing ecosystem, becoming indispensable for both brand-building and performance marketing.

Yet, the *2025 State of Video Survey*—drawing insights from over 100 senior marketers—reveals that while the perceived importance of video is high, many brands continue to struggle with executional complexity and measurement gaps.

Three Key Themes:

01

Video's Strategic Versatility: Video is now central to the full marketing funnel, as video formats proliferate and investment continues to increase.

02

Outcome-Focused Investment: Marketers are shifting spend toward programmatic and ROI-driven platforms, though measurement and attribution remain fragmented.

03

Innovation Amid Complexity: Creative in-housing, GenAI adoption, and evolving measurement currencies highlight both progress and persistent operational hurdles.

Outlook

The video landscape is set for continued expansion. To unlock its full potential, marketers must:

- Streamline omnichannel coordination
- Embrace modernized, unified measurement standards
- Invest in scalable creative processes and AI-driven content generation

Three key themes defining the state of video

01 Role of video in the mix: hugely important and versatile

Video is now considered an essential component of the marketing mix by nearly all marketers (98%) and its role is evolving to cover a wide range of needs. While video still carries the halo of a strong storytelling medium for 74% of marketers, two thirds use it for both brand and performance goals, underscoring its growing versatility across the full funnel. The diversity in KPIs—from viewability to sales and from brand lift to CAC—reflects video's dual function in branding and performance, a trend fueled by the rise of social commerce, short-form video, and other emerging formats.

Looking ahead, 90% of marketers plan to continue increasing investment in video (30% significantly) as their strategic needs expand. However, two out of three admit to facing significant executional challenges—particularly in data utilization, measurement accuracy, and creative alignment.

02 How video is bought: focus on outcomes and audience capabilities

Although direct buys are still common, a big share of video dollars (more than half) now goes through programmatic. This reflects a deeper trend around how video is planned and purchased, prioritizing audience targeting capabilities (#1 factor behind allocation decisions) as well as Outcomes /ROI (#2 factor).

Within this context, OLV and Social are perceived to offer the strongest ROI compared to Linear TV and CTV, although CTV as well as the other digital options are chosen for their superior audience targeting capabilities. CTV specifically, seems to be emerging as an important part of the mix—bringing the promise of premium content and advanced targeting. Yet, in reality marketers are challenged by various limitations, not just in targeting, frequency management and cross platform measurement.

Moving forward marketers will continue experimenting with a variety of new format options, with an increased focus on retail media video (64%), in-feed (64%) and instream CTV (61%).

03 The way forward: innovation amid complexity

A true omnichannel video strategy is still hampered by three persistent issues: complex budget allocation, fragmented measurement frameworks, and insufficient creative adaptation. At least half of marketers report struggles in each of these areas.

Cross-screen measurement and linking ad exposure to sales are especially difficult, prompting increased reliance on experimentation and Marketing Mix Modeling (MMM). ~50% of marketers are either testing or already using multiple measurement currencies, with growing emphasis on attention-based metrics for both buying and evaluation.

Marketers also face growing complexity in audience targeting due to limited scale (especially for highly targeted audiences), cookie deprecation, and inconsistent platform capabilities—leading to fragmented audience strategies across channels.

Finally, creative production is increasingly being managed in-house, with most marketers using a hybrid or fully in-house model for developing and adapting video content. In this context, 60% expect to accelerate production using generative AI, which is emerging as a vital tool for scalable content creation and campaign execution.



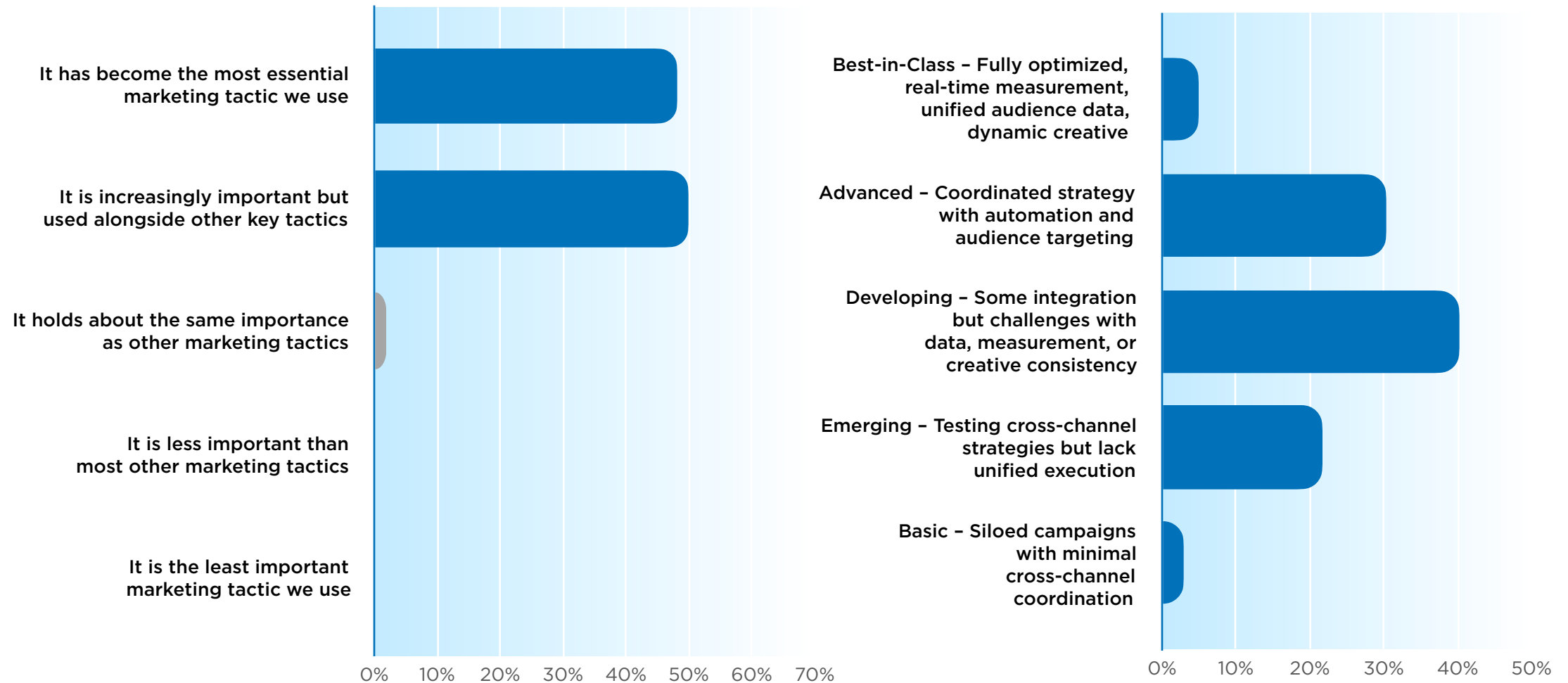
01

Importance and role of video

Video's Strategic Versatility: Key Insights

- Video is an essential ingredient of the mix, but most marketers still face challenges in their video strategy
- Video is still seen as a storytelling channel, yet in practice, a lot of marketers use it to drive performance
- The KPIs used to assess video reflect the multiplicity of goals that it's used for – starting with viewability and extending to sales and brand KPIs
- Multiple trends are shaping video advertising, led by social commerce and short form video
- Marketers expect to continue increasing their spend on video as their needs expand.

Video is an essential ingredient of the mix, but most marketers still face challenges in their video strategy

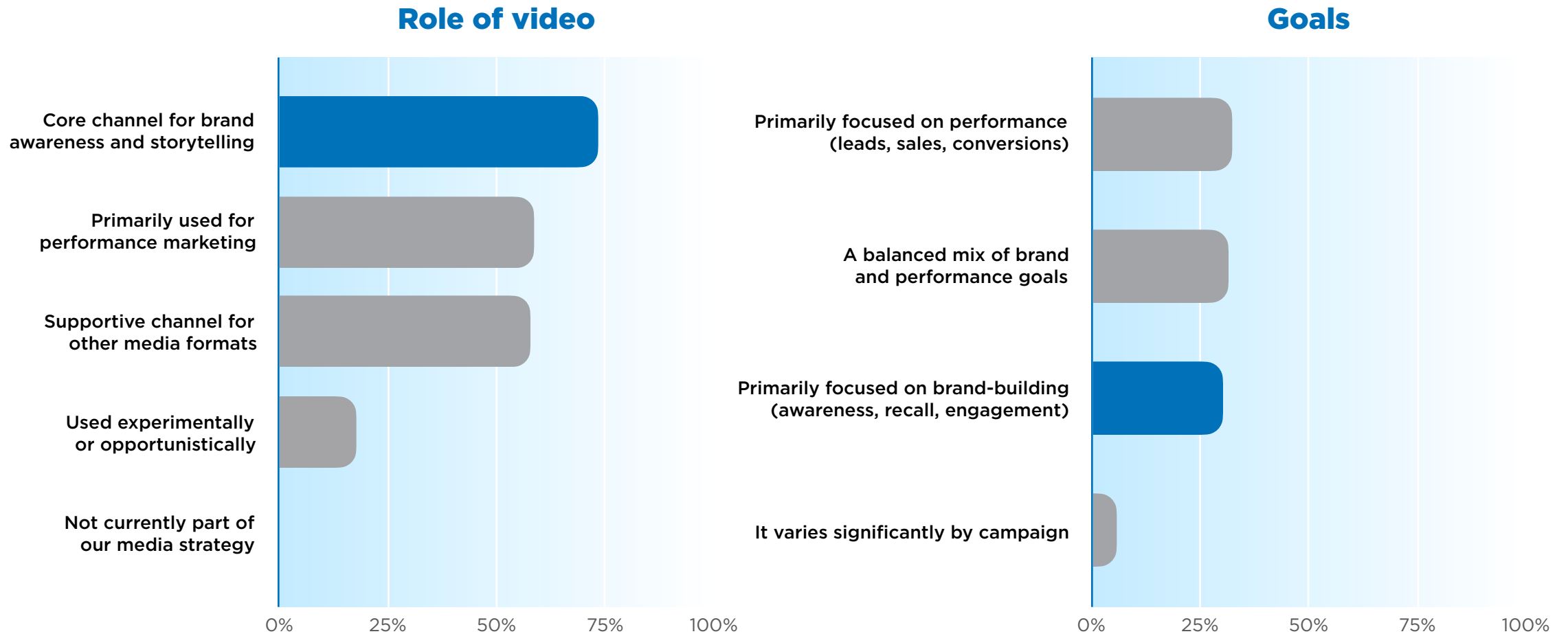


Q10: How essential is video advertising to your overall marketing strategy compared to other marketing tactics? (Select one)

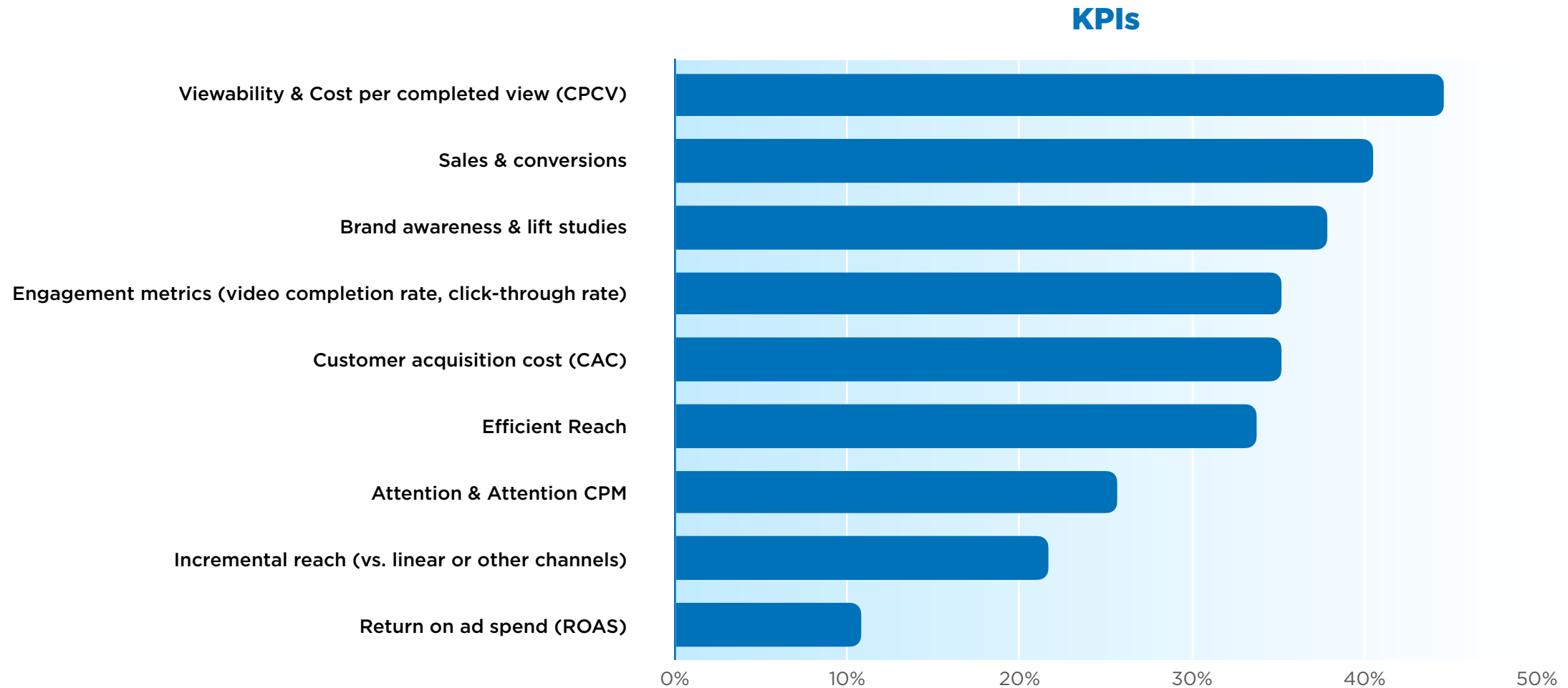
Q25: How would you describe your organization's maturity in executing an omnichannel video strategy? (Select one)

N=102 Senior Marketers

Video is still seen as a storytelling channel, yet in practice, a lot of marketers use it primarily for performance

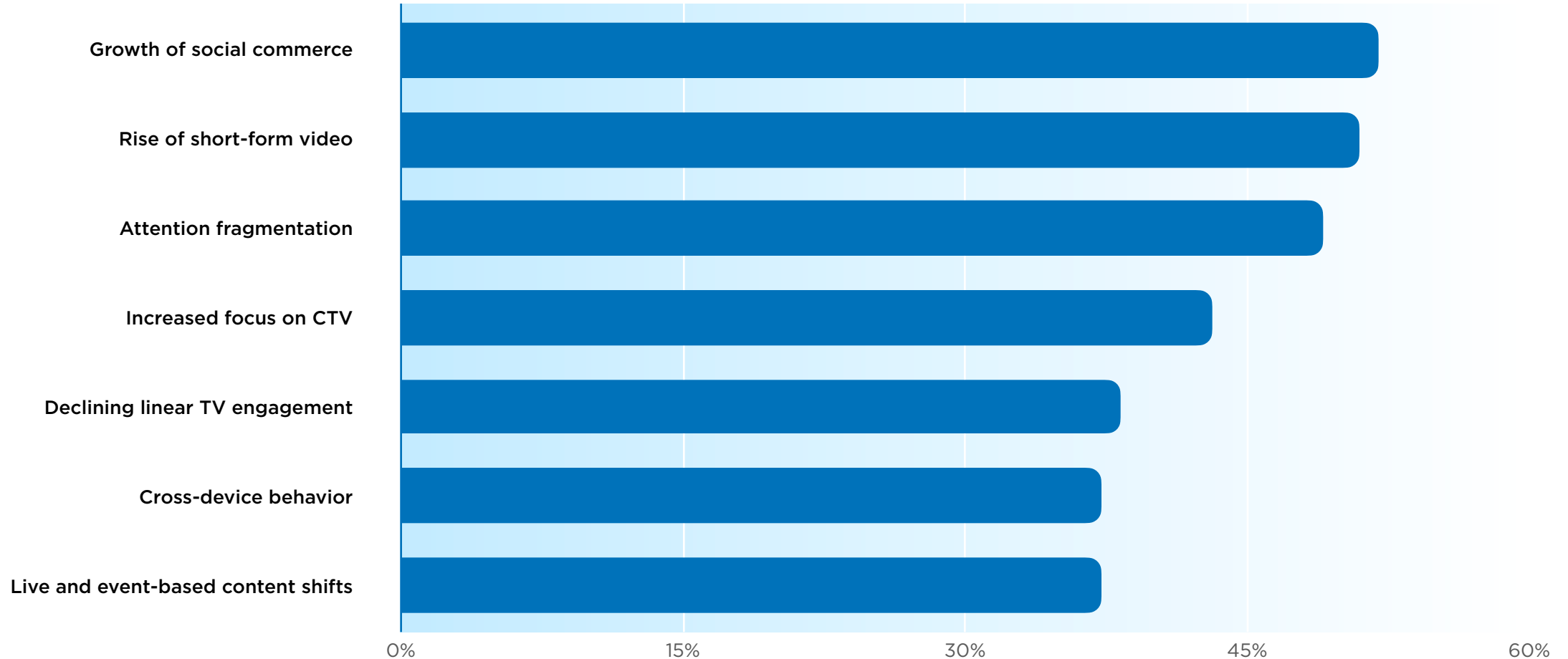


The KPIs used to assess video reflect the multiple goals that it's used for – starting with viewability and extending to sales and brand metrics

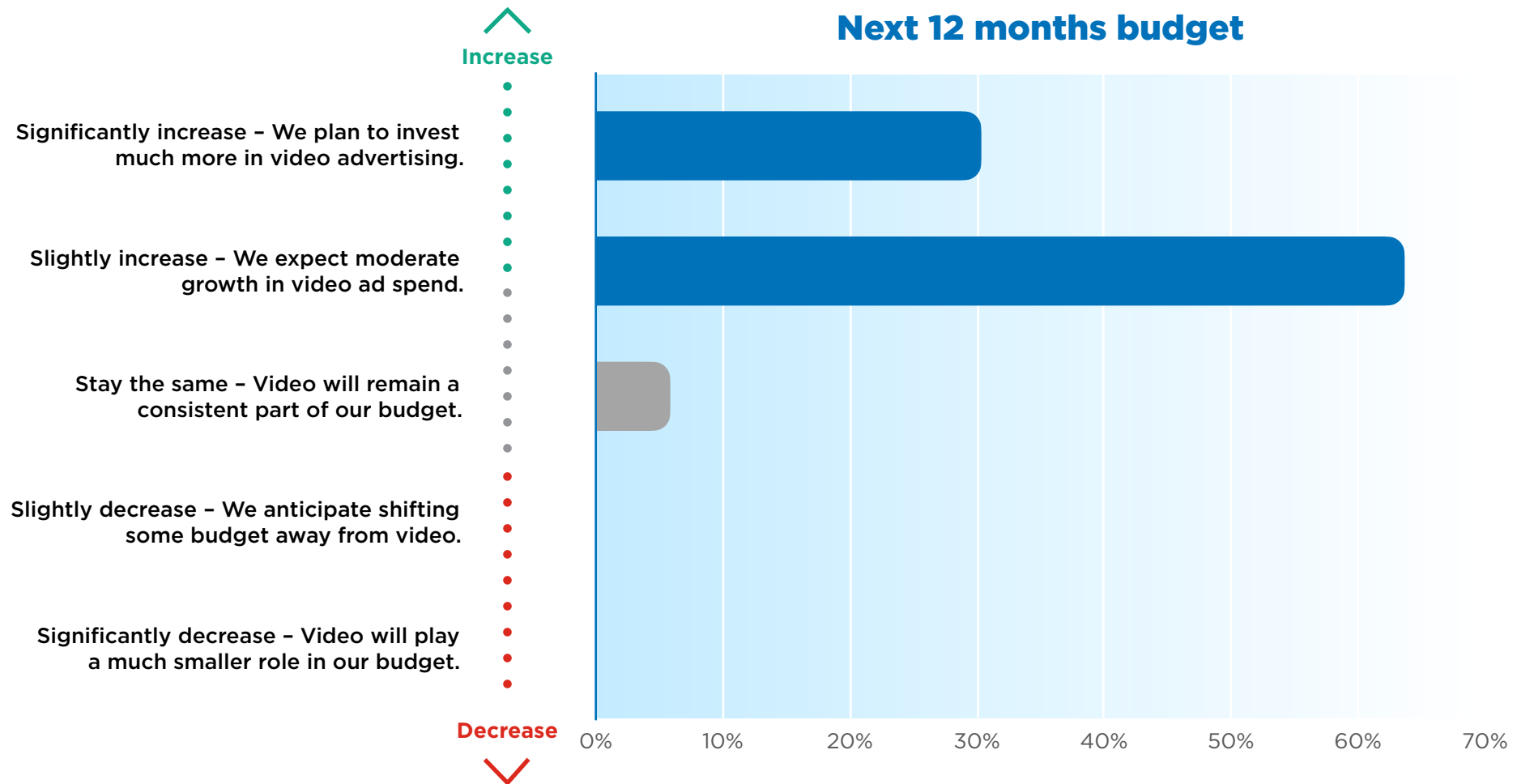


Multiple trends are shaping video advertising, led by social commerce and short form video

Biggest trends next 12 months



Marketers expect to continue increasing their spend on video as their needs expand





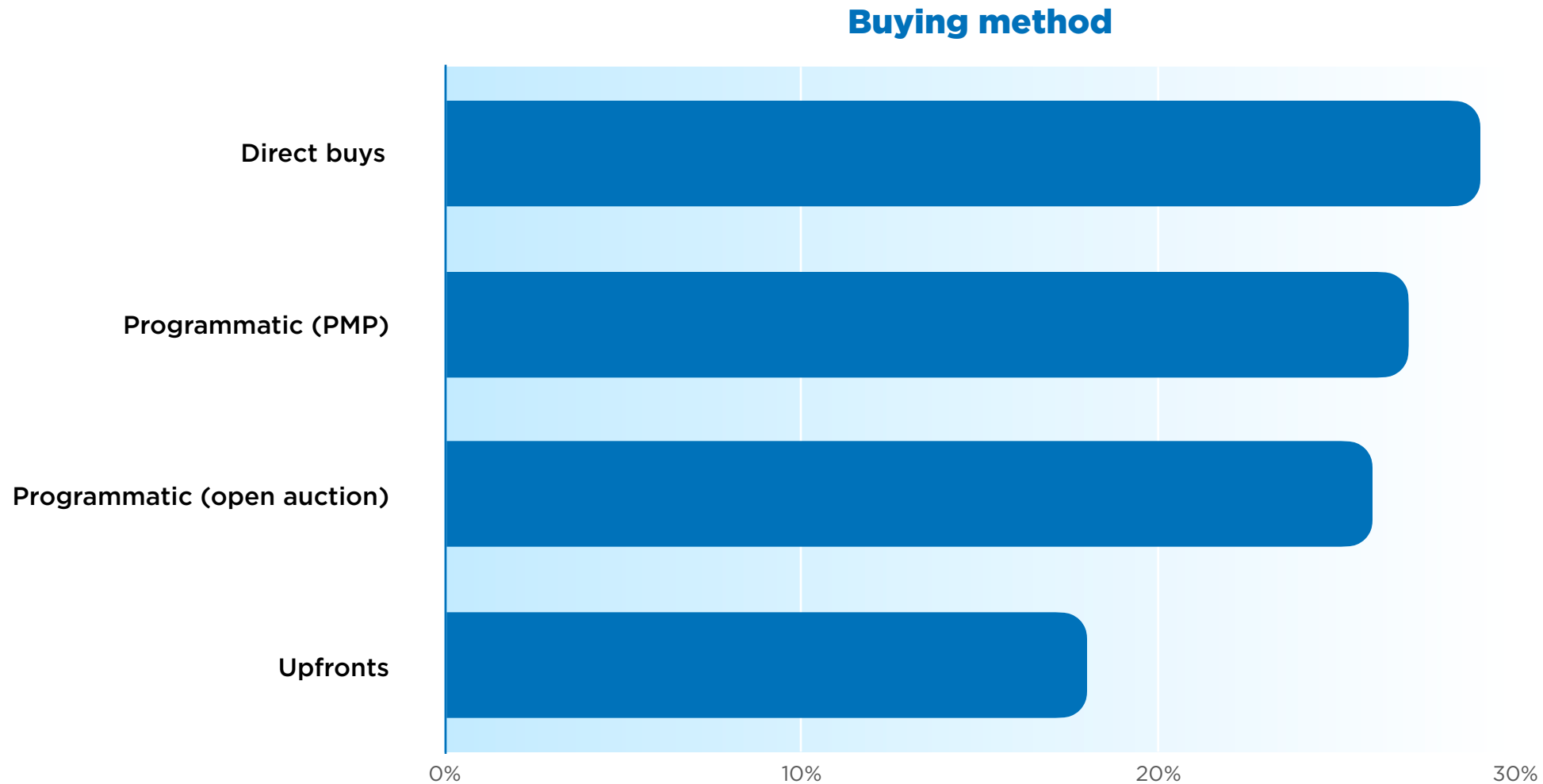
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Video Advertising: Available options and how brands buy video

Outcome-Focused Investment: Key Insights

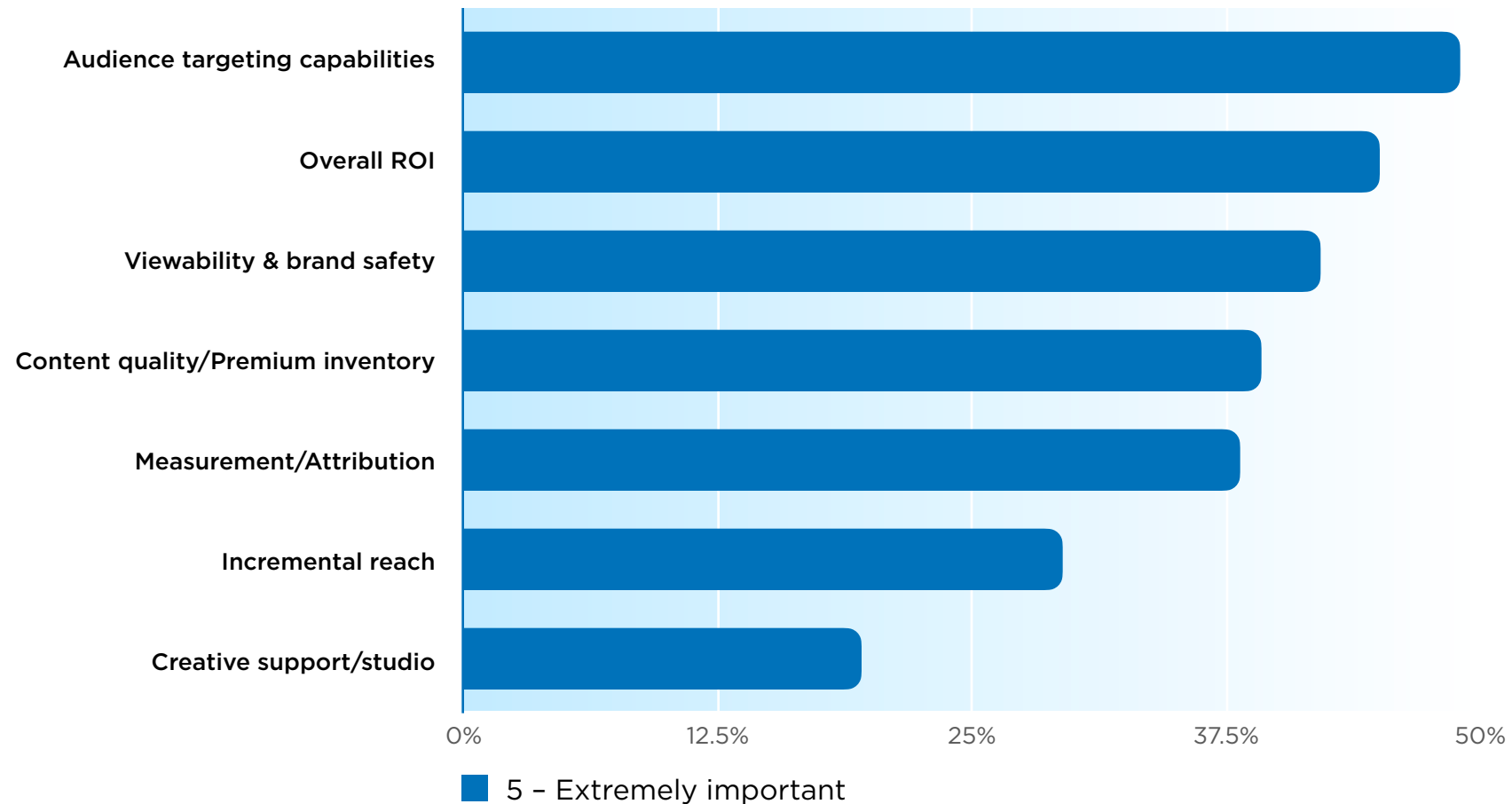
- 6 out of 10 video dollars go through programmatic
- Video decisions are primarily ROI/outcomes driven, with audience capabilities being a key consideration
- Proliferation of options, different value propositions – OLV and Social are perceived to offer the strongest value (higher ROI) compared to Linear TV and CTV, although no winner emerges in measurement and attribution.
- Experimentation with video formats continue to expand as options proliferate
- CTV brings the promise of advanced targeting, but that's also its main challenge (along with frequency cap)

Although direct buys are still common, a big share of video dollars go through programmatic



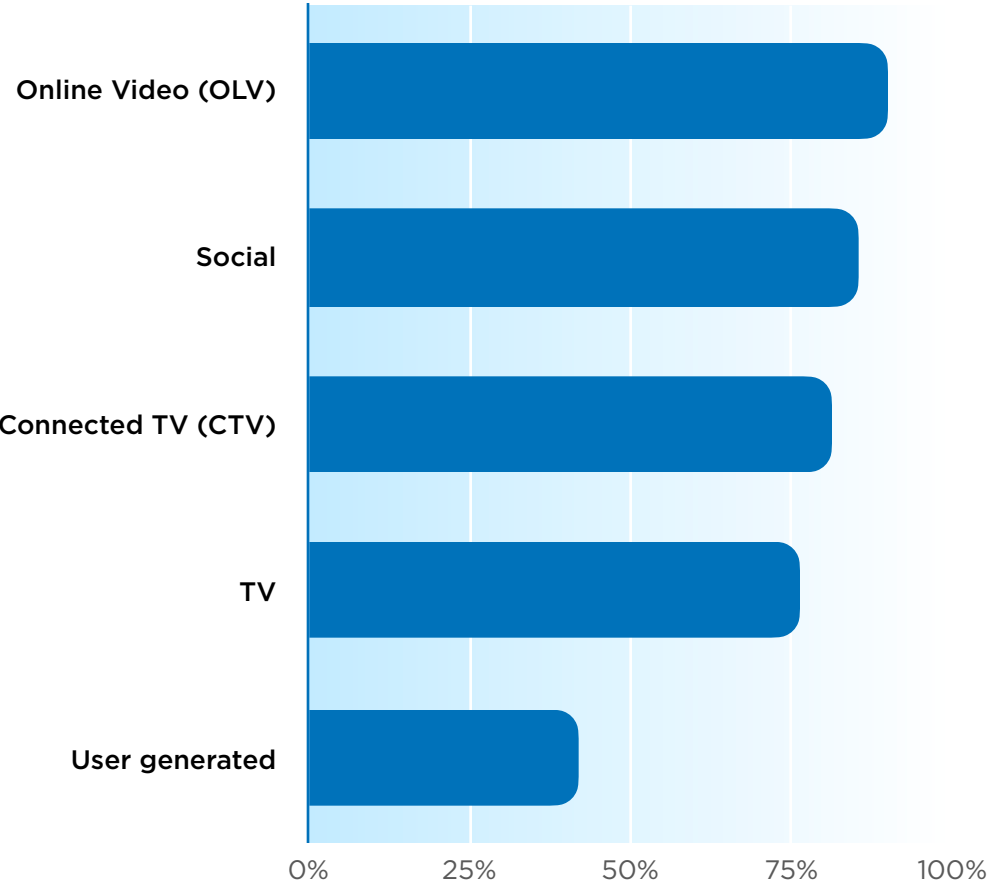
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Key factors behind allocation decisions

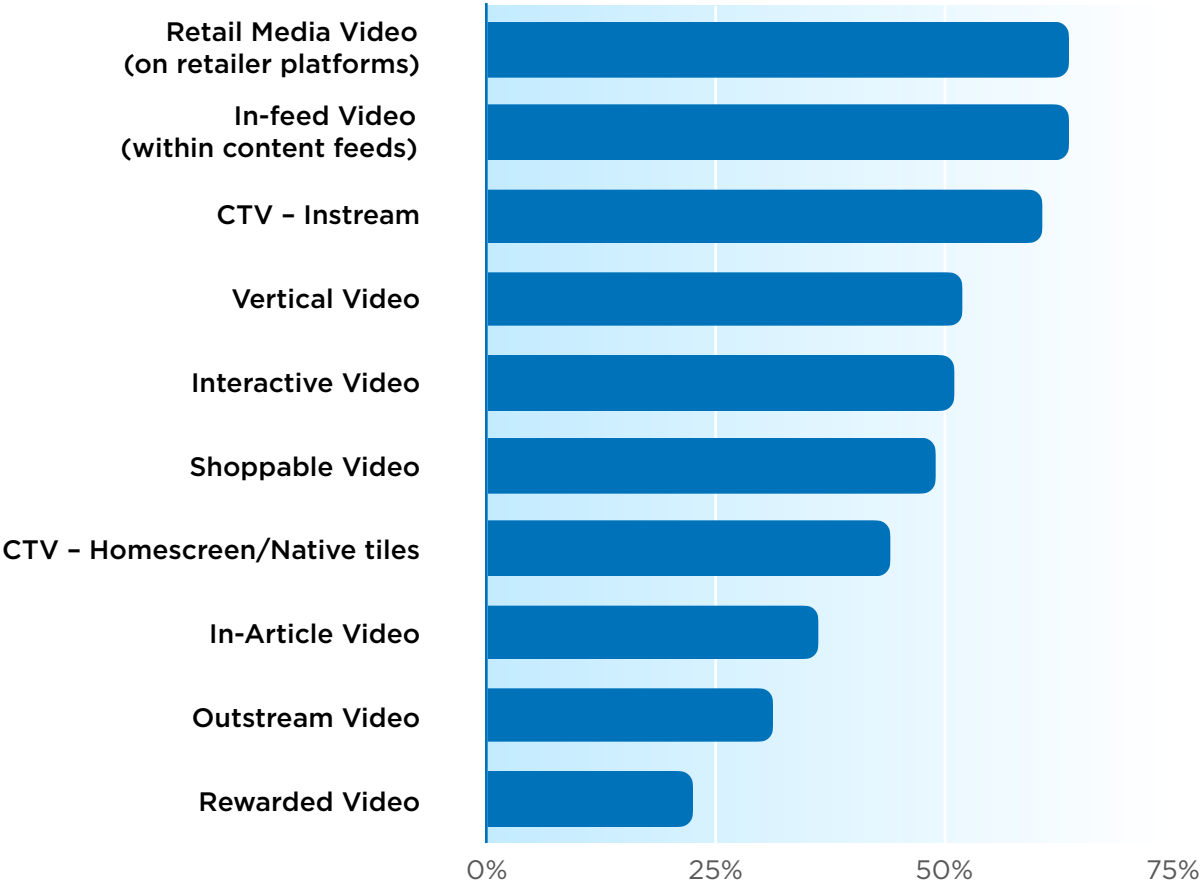


Experimentation with video formats continue to expand as options proliferate

Current forms used



Most interesting formats right now



Q8: What forms of video marketing does your organization primarily execute? (Select all that apply)
Q11: Which of the following video formats or placements are of most interest to your team right now? (Select all that apply)
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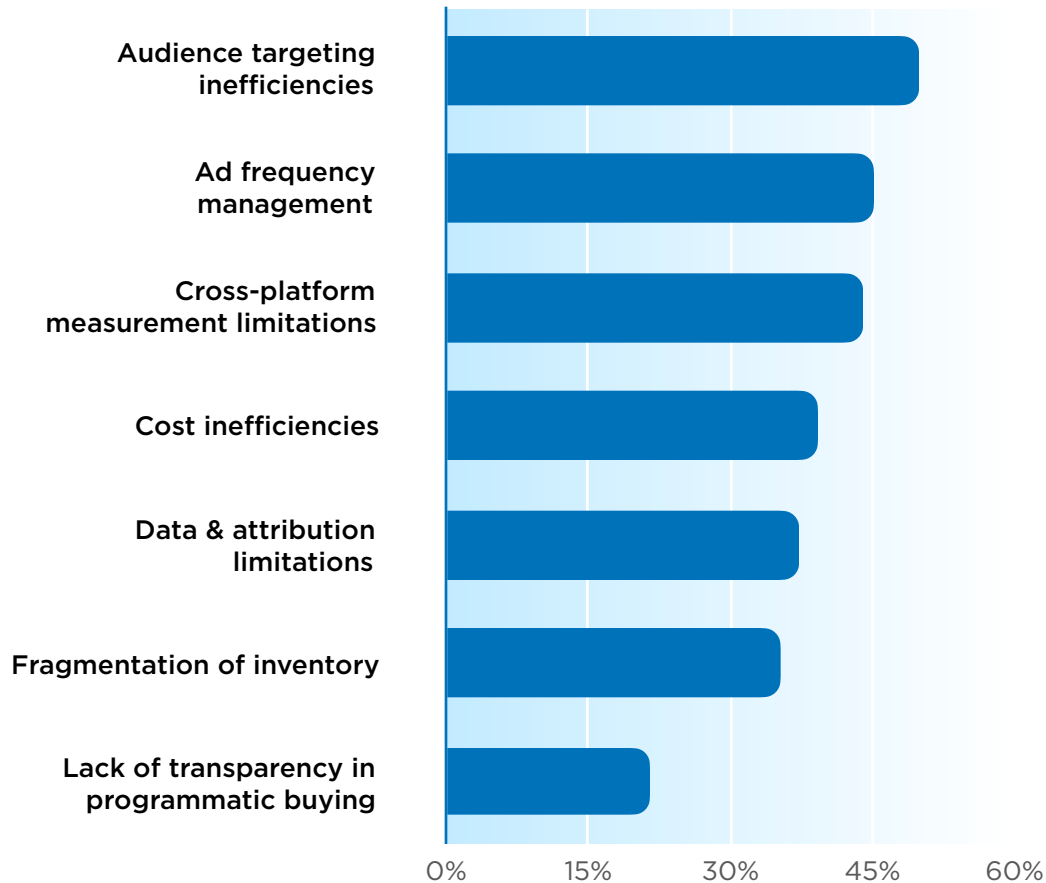
OLV and Social are perceived to have higher ROI, although no winner emerges in measurement and attribution.

“Excellent” Ratings

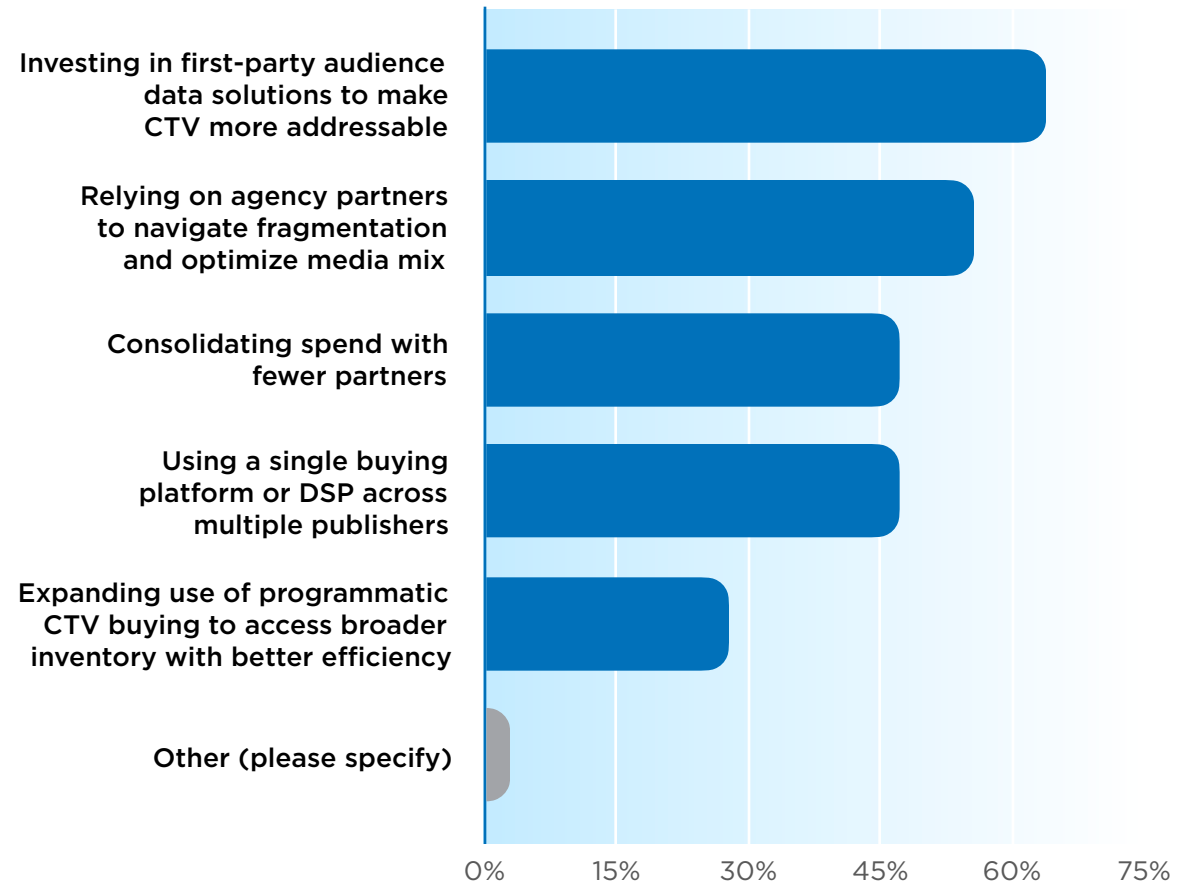
	Linear	CTV	OLV	Social
Incremental reach	25%	31%	42%	33%
Viewability & brand safety	36%	40%	19%	36%
Content quality / Premium inventory	32%	38%	29%	28%
Audience targeting capabilities	23%	38%	37%	44%
Measurement/Attribution	32%	30%	27%	33%
Overall ROI	23%	30%	37%	38%
Value proposition for marketers	Safe, viewable, premium and measurable	Safe, premium & targetable	Incremental reach, targetable and good ROI	Viewable, targetable with good measurement & ROI

CTV brings the promise of advanced targeting, but that's also its main challenge (along with frequency cap)

Key CTV challenges



Key solutions





03

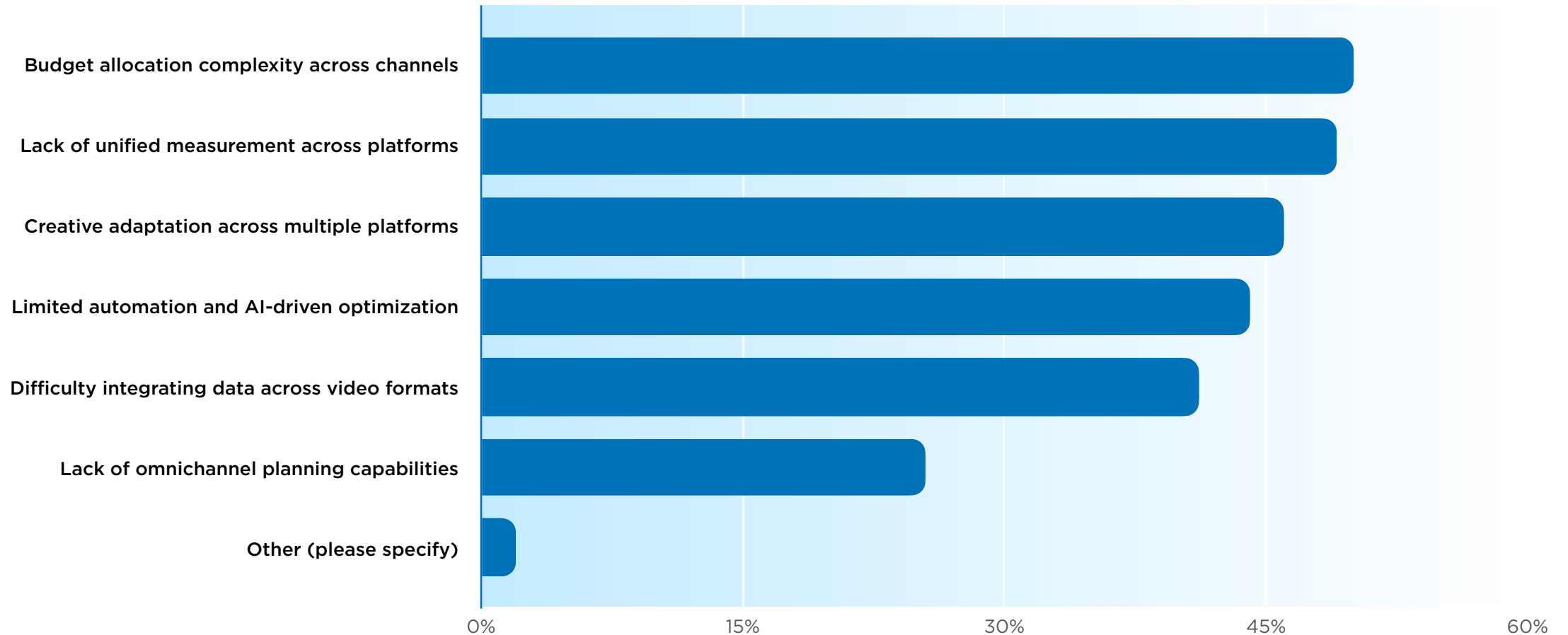
State of video advertising execution

Innovation Amid Complexity: Key insights

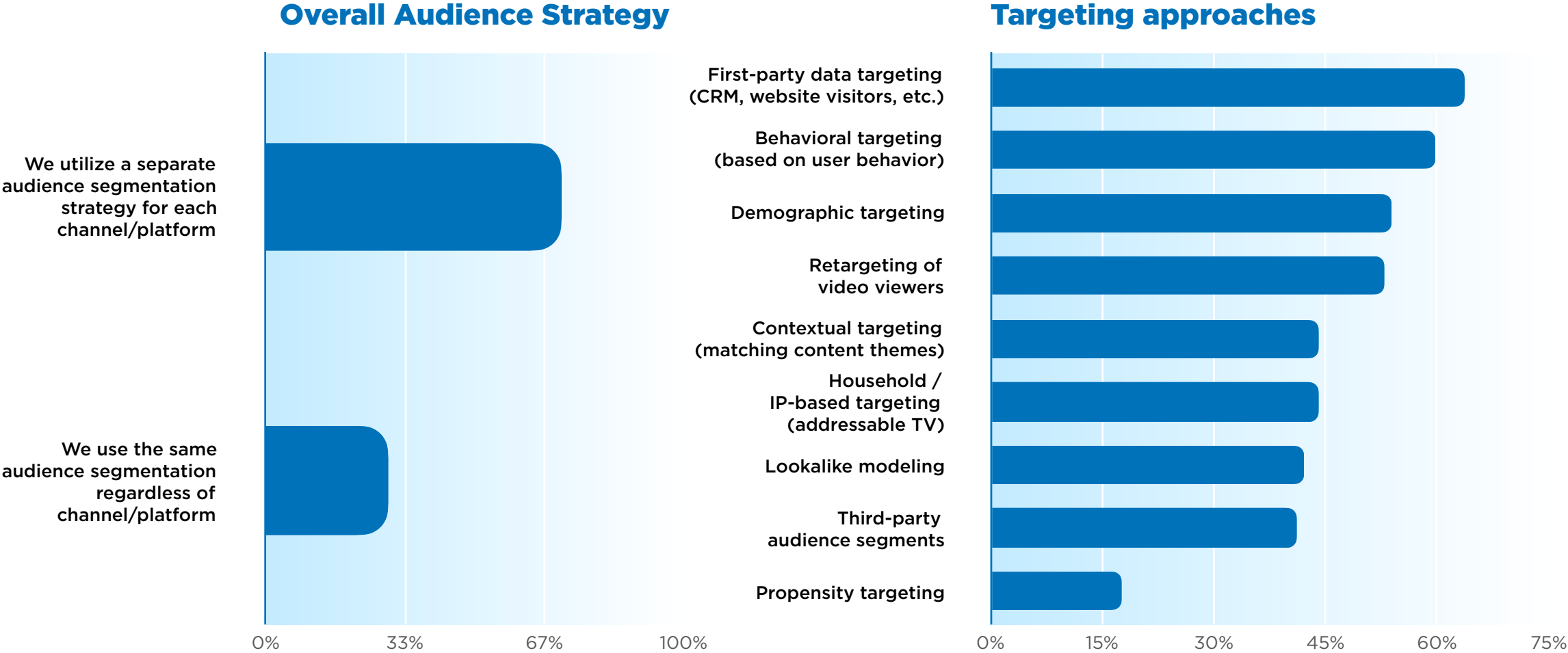
- True omnichannel strategy is hindered by budget allocation complexity, lack of unified measurement and creative adaptation
- Issues with audience (limited scale and varying capabilities across platforms), as well as cookie deprecation are key challenges
- As a result, marketers face additional complexity, utilizing a separate audience strategy for each platform, leading with 1P and behavioral data (although demo are still widely used)
- Experiments & MMM are key tools used for measurement, followed by MTA that is a bit challenged by privacy constraints
- There is a notable shift to in-housing of video creative and adaptation
- There is a desire to test alternative currencies, with some marketers leaning into attention
- GenAI for content creation is seen as the main area where AI will impact video and creative strategy

True omnichannel strategy is hindered by budget allocation complexity, lack of unified measurement and creative adaptation

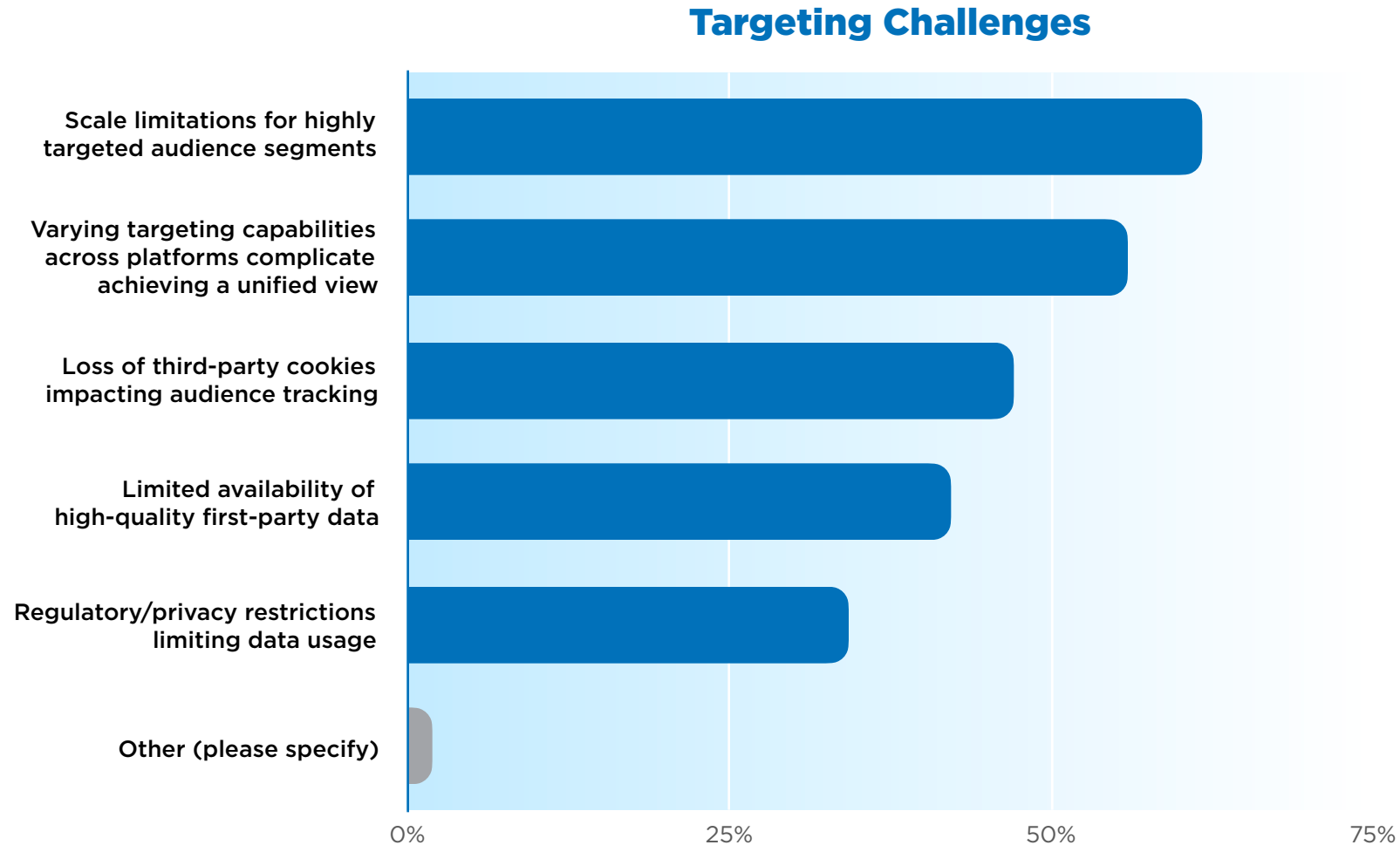
Key omni-channel challenges



Marketers get granular with a separate audience strategy by platform, leading with 1P and behavioral data (although demo are still widely used)

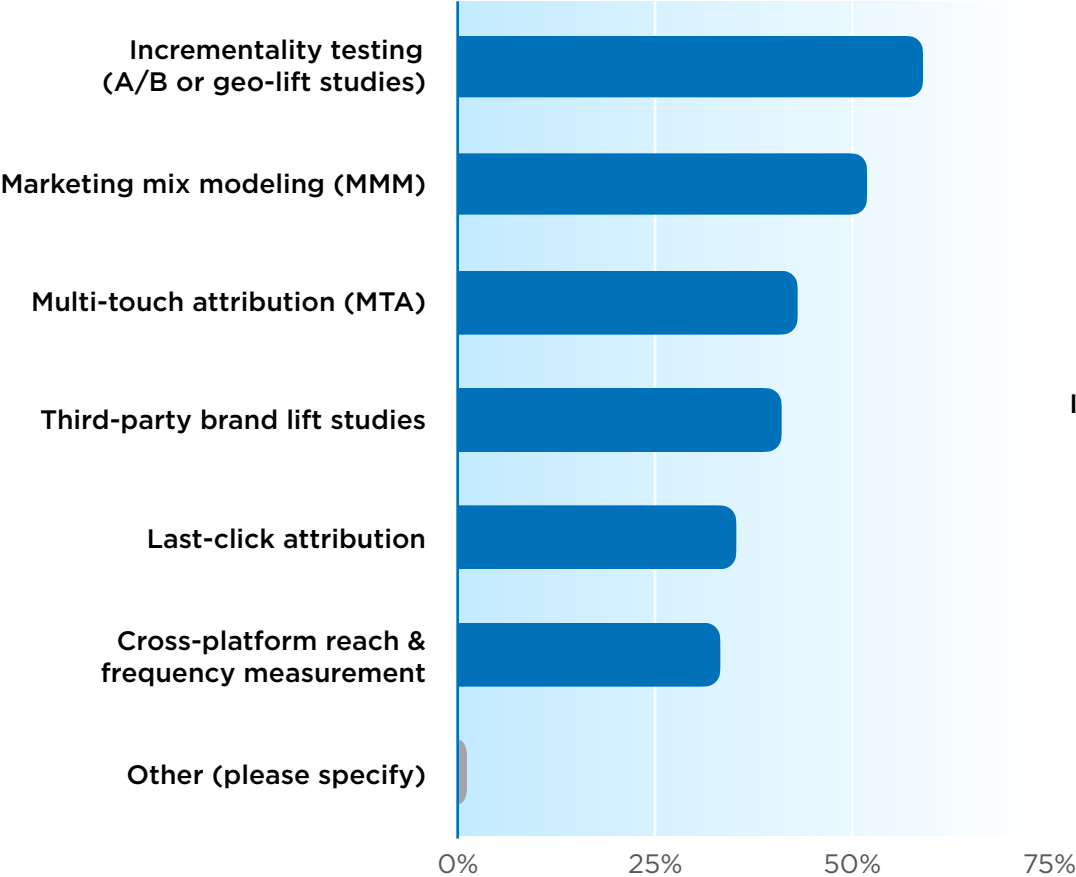


Issues with audience (limited scale and varying capabilities across platforms), as well as cookie deprecation are key challenges

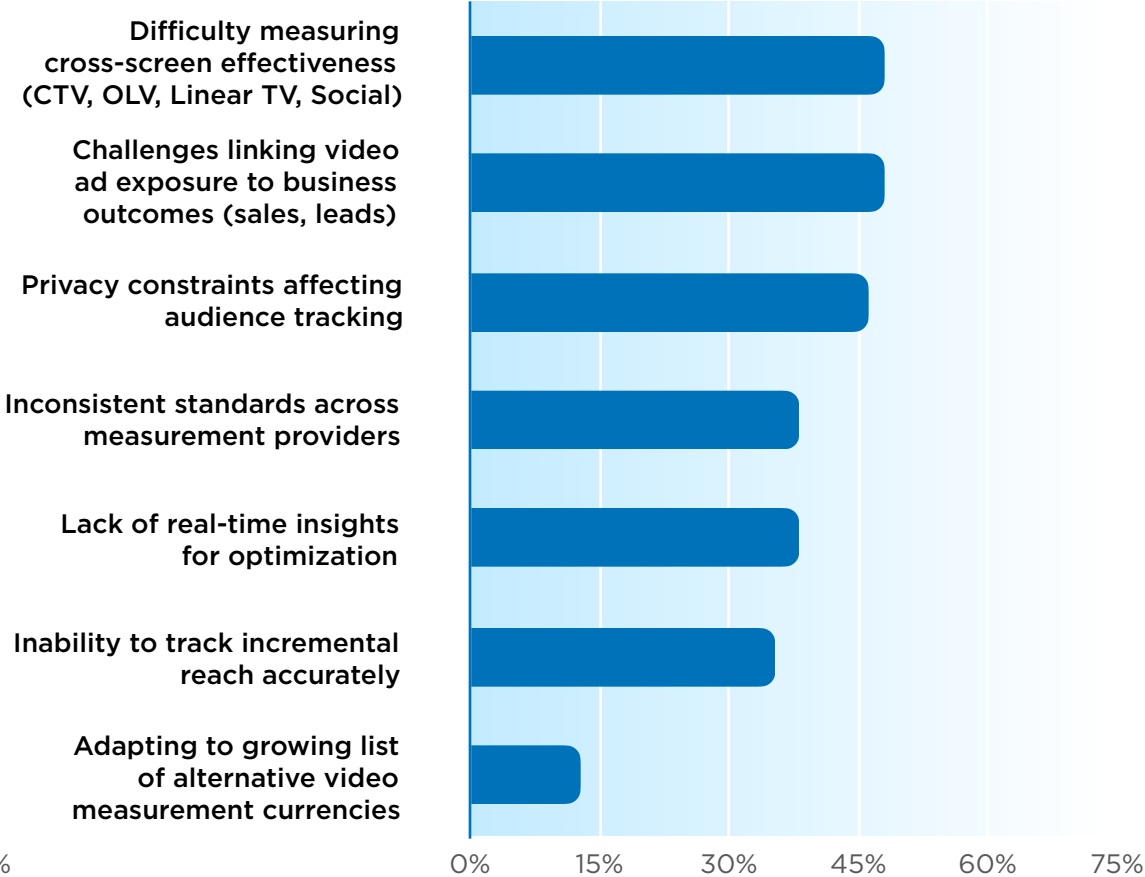


Experiments & MMM are key tools used for measurement, followed by MTA. Cross screen measurement, privacy and connection to sales remain challenges.

Measurement approaches

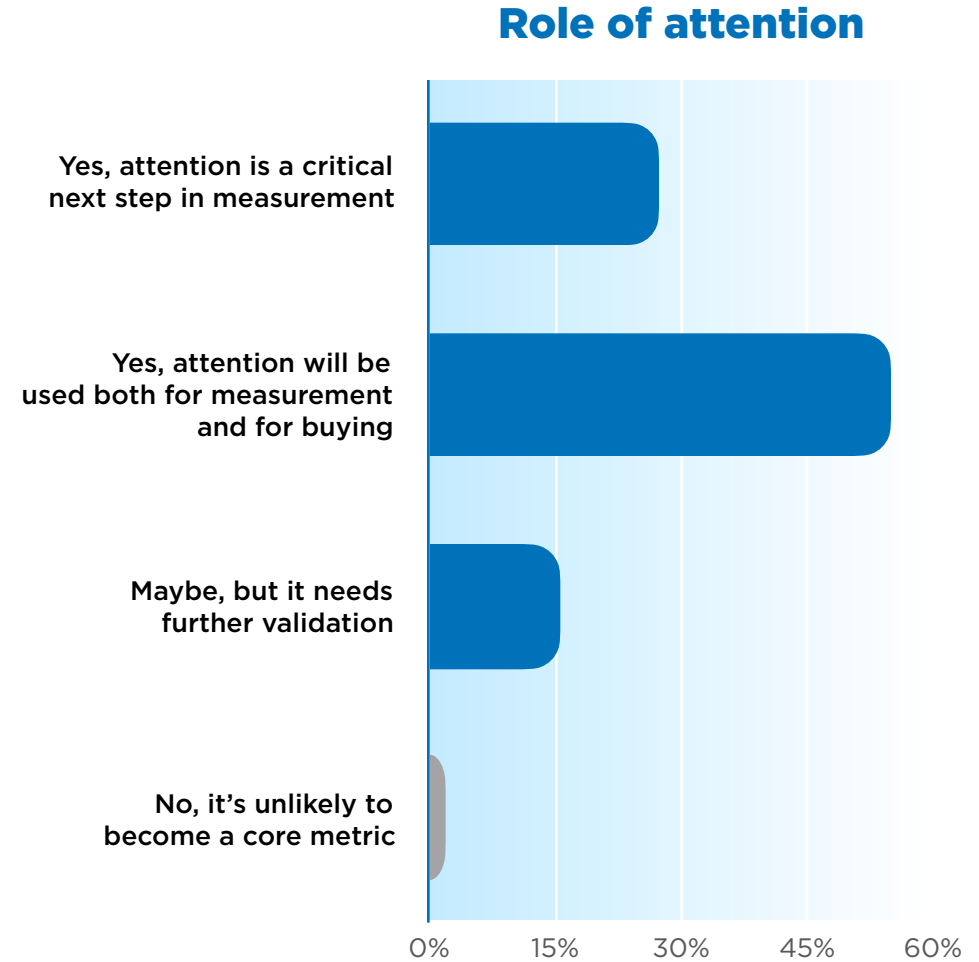
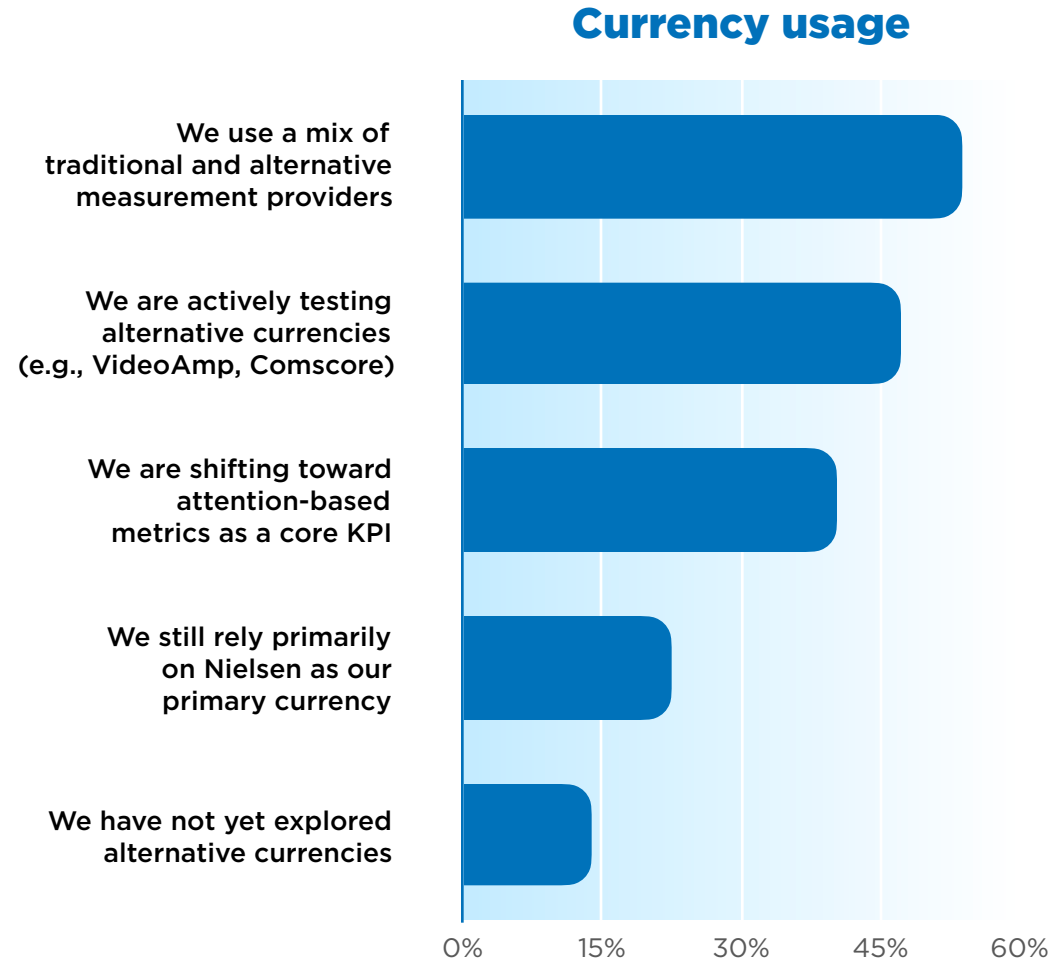


Biggest gaps in measurement

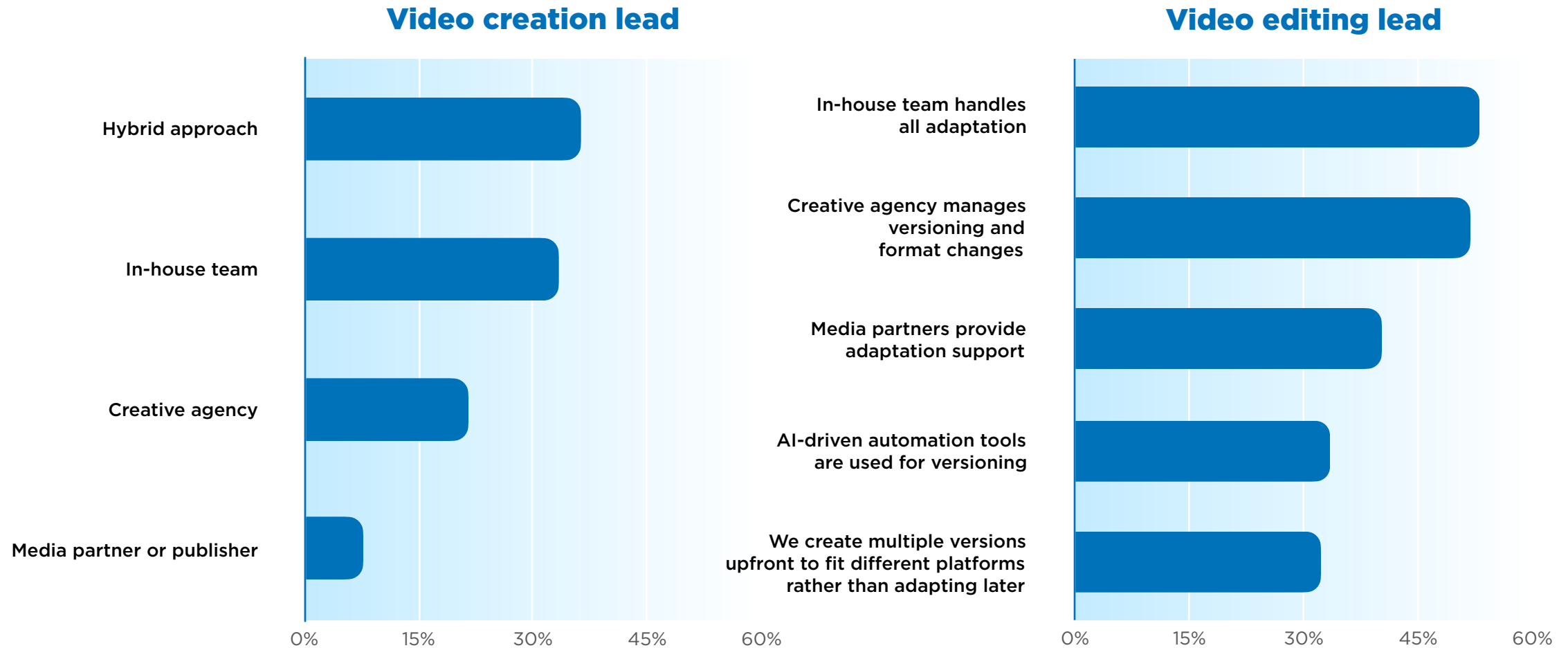


Q29: Which measurement approaches do you use to assess video advertising performance? (Select all that apply)
Q30: What are the biggest gaps in video measurement today? (Select up to three)
N=102 Senior Marketers

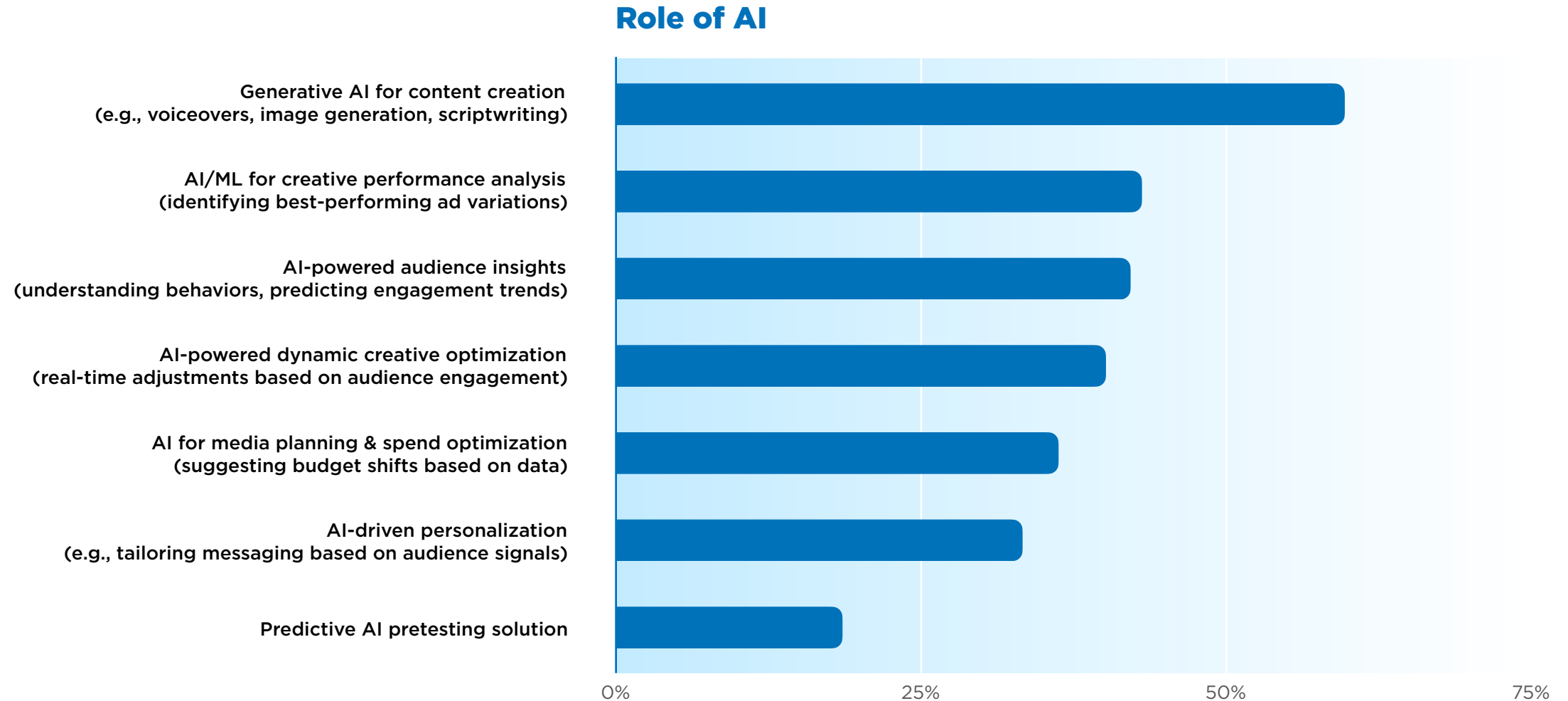
There is a desire to test alternative currencies, with some marketers leaning into attention

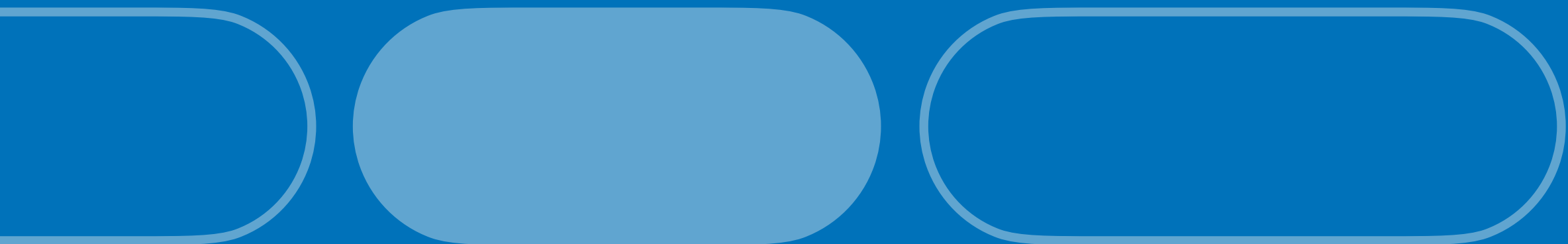


There is a notable shift to more in-housing of video creative and adaptation



GenAI for content creation is seen as the main area where AI will impact video and creative strategy

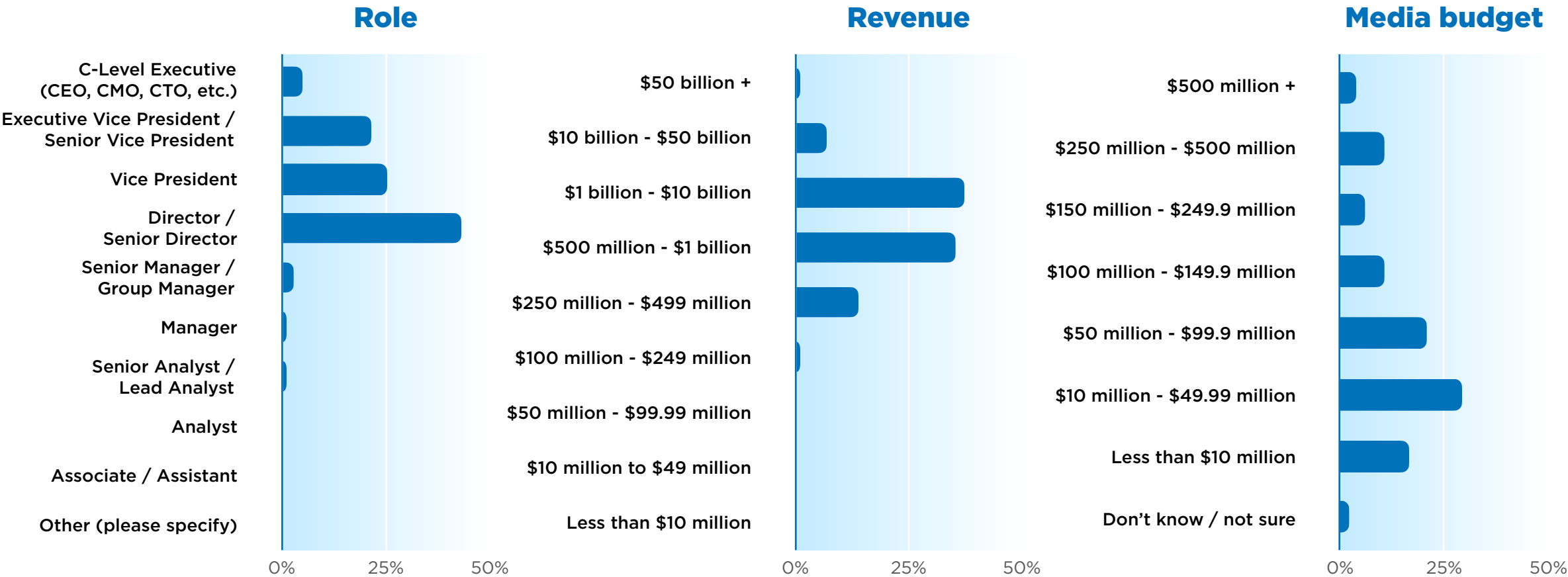




Participant Firmographics



Participant Firmographics



About MMA Global

MMA Global is a non-profit industry association dedicated to dramatically improving Marketing's ability to deliver on a company's growth agenda. With 800+ member companies and offices in 15 countries around the world, the MMA is organized and run by Marketers and the only trade body to include all aspects of the marketing ecosystem (adtech/martech, platforms, media, agencies), which is crucial in addressing the industry's most pressing challenges.

MMA invests in scientific research leveraging research consortiums and in-market experiments to discover new approaches to improve the return on investments in marketing. These initiative are executed through three Think Tanks each with a mission to drive step-function improvement in marketing-led growth and profitability.



Marketing Attribution Think Tank (MATT):

Empower marketers with a true impact of Marketing through advancing scientific approaches to measurement that will ultimately increase the value of their company.



Marketing Organizational Strategy Think Tank (MOSTT):

Empower marketers to build & execute winning data & customer strategies that will ultimately increase the value of their company.



Marketing Data and Customer Experience Think Tank (DATT):

Empower marketing executives to understand and implement evidence-based Organizational Structures that will ultimately increase the value of their company.

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