



THE 2025 INDUSTRY PULSE REPORT

November 2024

U.S. EDITION



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FIELD DATE

September 2024

PARTICIPATION

N=254 U.S. digital media experts who use programmatic advertising

- Ad Tech (n=52)
- Advertisers (n=76)
- Agencies (n=75)
- Publishers and platforms (n=51)

Integral Ad Science (IAS) partnered with [YouGov](#) to survey U.S. digital media experts from both the buy- and sell-sides to understand their perspectives on media challenges lying ahead and opportunities they will seek to harness in 2025.

In this annual report, we deep dive into the trends, technologies, and solutions that will shape digital media and advertising in 2025, directly from top industry professionals.

EXECUTIVE SUMMARY

The digital media landscape is constantly evolving. To gauge how digital media will shift in 2025, IAS sampled media experts (advertisers, agencies, ad tech, publishers, and platforms) on their perceptions of foreseeable challenges and opportunities in the industry, and the role that measurement and optimization providers will play in the coming year.

Here's what media experts expect in 2025:

CHALLENGES

- 53% of media experts see social media as the environment most vulnerable to brand risk
- 31% of media experts are most concerned about ads delivering alongside risky content and misinformation
- 24% of media experts are most concerned about ads delivering near deepfakes

OPPORTUNITIES

- 71% of media experts agree AI-driven measurement for multimedia content will ensure digital video ads are placed in brand safe environments
- 58% of media experts say contextual targeting will be critical to achieve campaign KPIs on retail media networks
- 49% of media experts say brand suitability is their top media quality priority

SOLUTIONS

- **Advanced machine learning technology** will allow advertisers to detect and classify multimedia content, including deepfakes and misinformation
- **Brand suitability products** will allow advertisers to avoid risky content and support quality publishers

TABLE OF CONTENTS

01

2025 INDUSTRY
PRIORITIES

02

SOCIAL
MEDIA

03

DIGITAL VIDEO
& CTV

04

EMERGING
MEDIA

05

AI-DRIVEN
DISRUPTIONS

06

MEDIA QUALITY
PRIORITIES

07

KEY
TAKEAWAYS

08

ABOUT IAS

01

2025 INDUSTRY PRIORITIES

Industry experts weigh in on media
priorities and the challenges and
opportunities ahead

TOP MEDIA PRIORITIES IN 2025

61%

SOCIAL MEDIA

SOCIAL MEDIA

Social media remains the top media priority but faces challenges, like the prevalence of deepfakes, and new opportunities, like social shopping.

43%

DIGITAL VIDEO*

DIGITAL VIDEO

Digital video continues to grow in volume, becoming increasingly interconnected with social media as video dominates this channel.

28%

DIGITAL DISPLAY

DIGITAL DISPLAY

Remaining a steadfast and reliable staple of digital advertising, digital display will continue to deliver reach and scale in 2025.

28%

INFLUENCER
MARKETING

INFLUENCER MARKETING

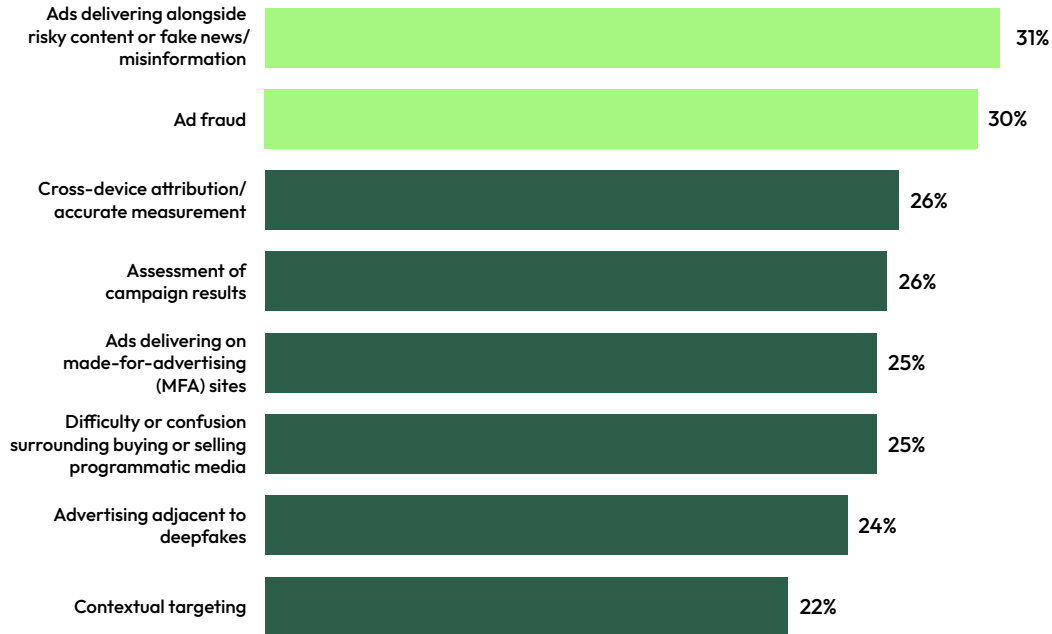
Emerging as a top priority, media experts plan to ramp up influencer marketing, harnessing the power of creators and influencers to drive social purchases.

TOP ANTICIPATED MEDIA CHALLENGES: ADVERTISERS, AGENCIES, & AD TECH

For the second year in a row, safety concerns top the list of anticipated media challenges for advertisers, agencies, and ad tech. When analyzing by company type*, advertisers in particular expressed concern with delivering ads alongside risky content (39%) and deepfakes (31%).

Ad waste is also top of mind. Buy-side media experts will be on particularly high alert for ad fraud, and 1-in-4 media experts are concerned about delivering ads on made-for-advertising (MFA) sites.

Assessment of campaign results will remain a top challenge, especially for advertisers (33%), which highlights the importance of clear and actionable results data.

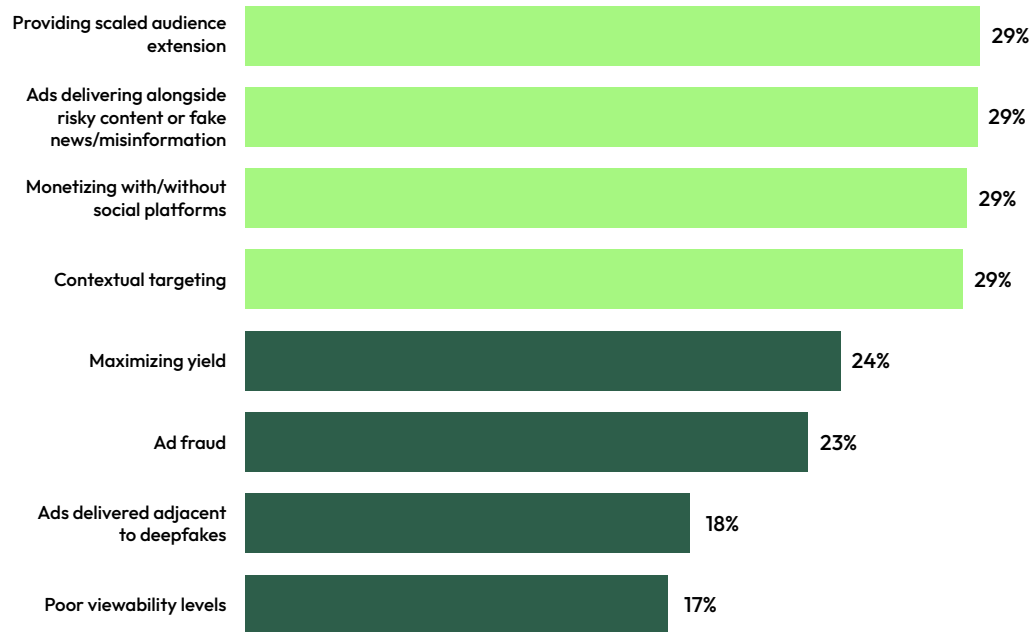


TOP ANTICIPATED MEDIA CHALLENGES: PUBLISHERS & PLATFORMS

Publishers and platforms foresee a variety of media challenges in 2025. Among these top concerns is providing scaled audience extension, particularly while maintaining cost efficiency.

In line with advertisers, agencies, and ad tech, publishers and platforms flagged challenges to brand safety, including concerns with ads delivering near risky content and misinformation, as well as contextual targeting.

Publishers and platforms are also concerned about driving business results, including monetization and maximizing yield.

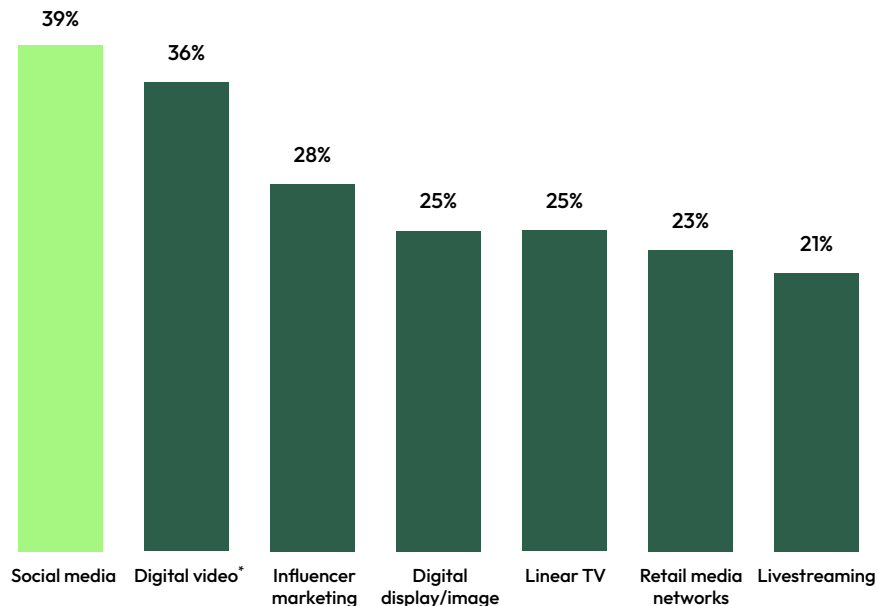


MEDIA TYPES FACING THE BIGGEST CHALLENGES

Social media continues to top the list of media types that will face challenges in the coming year. These challenges include legislation that may limit social use and heightened brand risk due to AI-generated content and deepfakes.^{1,2}

More than 1-in-3 media experts expect digital video and CTV to confront challenges, and digital video in particular may face media quality threats from deepfakes.

Emerging opportunities like influencer marketing and livestreaming are also likely to face challenges, perhaps due to growing pains.

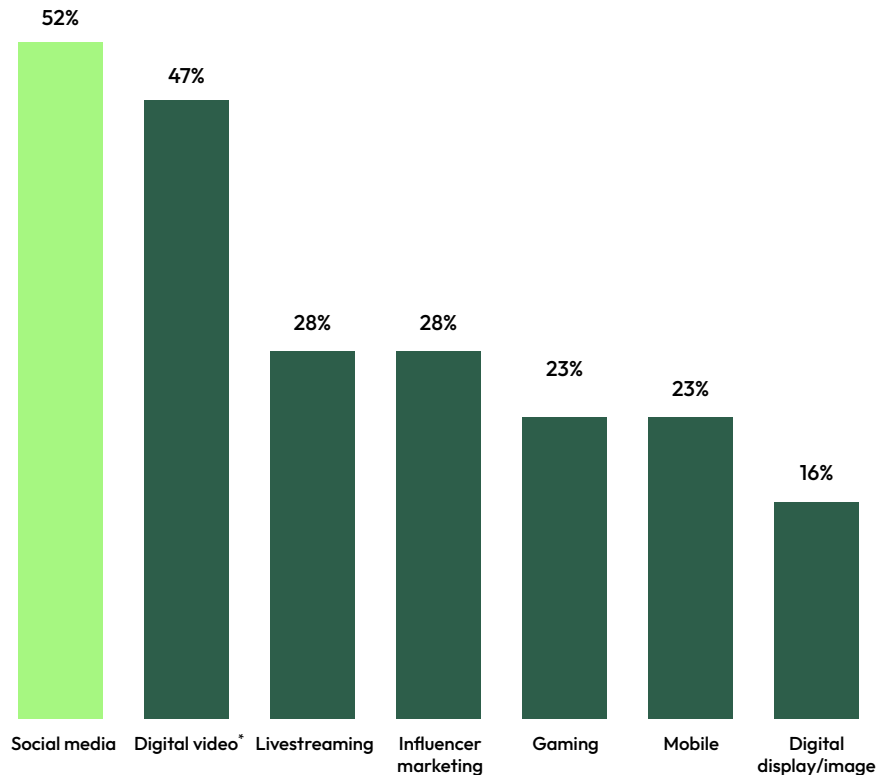


MEDIA TYPES WITH THE MOST POTENTIAL FOR INNOVATION

Social media holds the most potential for opportunity, with social shopping, search, and influencer marketing as key areas for innovation in the coming year.

Digital video* also has strong potential for innovation, possibly with engaging new ad formats.³ As video becomes increasingly interconnected with social media platforms, social video and livestreaming will likely lead to additional opportunities for innovation.

Media experts also foresee innovative potential for emerging media formats including influencer marketing and gaming.



02

SOCIAL MEDIA

Media experts analyze opportunities
for growth and risks to ad spend on
social media platforms

SOCIAL MEDIA SPEND MAY BE IMPACTED BY CONSUMER TRUST, MEDIA QUALITY TRANSPARENCY, AND INCREASED REGULATIONS

62%

of media experts agree that eroding consumer trust in major social media platforms will negatively impact media spend in the next 12 months

57%

of media experts agree that insufficient transparency into media quality metrics will negatively impact media spend in the next 12 months

50%

of media experts agree that increasing regulations over tech platforms will negatively impact their social media spend

MEDIA QUALITY MEASUREMENT IS KEY TO ASSESSING SOCIAL CAMPAIGN HEALTH, ESPECIALLY AS DEEPFAKE RISK RISES

ATTENTION

78%

of media experts believe that measuring attention on social media ads will be important to evaluate campaigns

VIEWABILITY

76%

of media experts believe that measuring viewability on social media will be important to evaluate campaigns

DEEPFAKES

66%

of media experts say that third party measurement will be important to avoid advertising adjacent to deepfakes on social media platforms

SOCIAL SHOPPING GAINS INFLUENCE

Social shopping strategies are increasingly leveraging influencers, with 86% of U.S. marketers expected to use influencer marketing in 2025.⁴

Adoption of influencer marketing is so high because it's effective: influencers build brand awareness and drive purchases. Nearly half of U.S. social shoppers have been influenced to purchase on social media by influencers, creators, or celebrities.⁵

SOCIAL SHOPPING

78%

of media experts agree social shopping traffic will continue to increase

INFLUENCER MARKETING

70%

of media experts agree that influencer marketing will become an increasingly important part of social media advertising strategies

03

DIGITAL VIDEO & CTV

Media experts examine growth and media quality challenges in digital video and CTV

CTV AND DIGITAL VIDEO CONTINUE TO THRIVE

Between the robust growth of social video and additional time spent on CTV, consumers are continuing to shift from linear TV to digital alternatives — and ad spend will follow.

Emerging opportunities in CTV may help drive additional growth in this space in 2025. Some major CTV players have recently rolled out new playable and shoppable ad formats while others have developed picture-in-picture ads to combat ad blockers.³

73%

of media experts agree the shift in ad spend from linear TV to CTV will continue

71%

of media experts say the accelerated consumption of social video will continue to drive programmatic video ad spend

68%

of media experts think the shift in ad spend from programmatic display to programmatic video will continue

AD FRAUD AND BRAND SAFETY CONCERNS FOR DIGITAL VIDEO ARE GROWING

As digital video ad inventory continues to grow, so will ad fraud and brand safety concerns.

To combat these risks, 83% of media experts agree third party measurement will be crucial to ensure brand safety and reduce ad spend waste to fraud.

AD FRAUD

83%

of media experts agree fraud will be a greater concern as the volume of digital video inventory increases

BRAND SAFETY

81%

of media experts agree brand safety will be a greater concern as the volume of digital video inventory increases

AI-DRIVEN MEASUREMENT WILL HELP PROTECT DIGITAL VIDEO CAMPAIGNS

Developments in measurement and optimization technology will be a critical ingredient in evaluating and protecting digital video campaigns.

Attention measurement will help media experts ensure their ads are capturing the eyes of consumers, while AI-driven measurement for multimedia content will protect brands by avoiding advertising adjacent to risky content.

ATTENTION

80%

of media experts agree measuring attention to digital video ads will be important to evaluate campaign performance

AI-DRIVEN MEASUREMENT

71%

of media experts agree AI-driven measurement for multimedia content will ensure digital video ads are placed in brand safe environments

CTV WILL EXPERIENCE ITS OWN UNIQUE MEDIA QUALITY RISKS

78%

of media experts agree that it will be critical for media measurement and optimization platforms to help advertisers avoid CTV **ad frequency overload**

75%

of media experts agree that it will be critical for advertisers to integrate **cross-platform targeting and tracking** into CTV campaigns

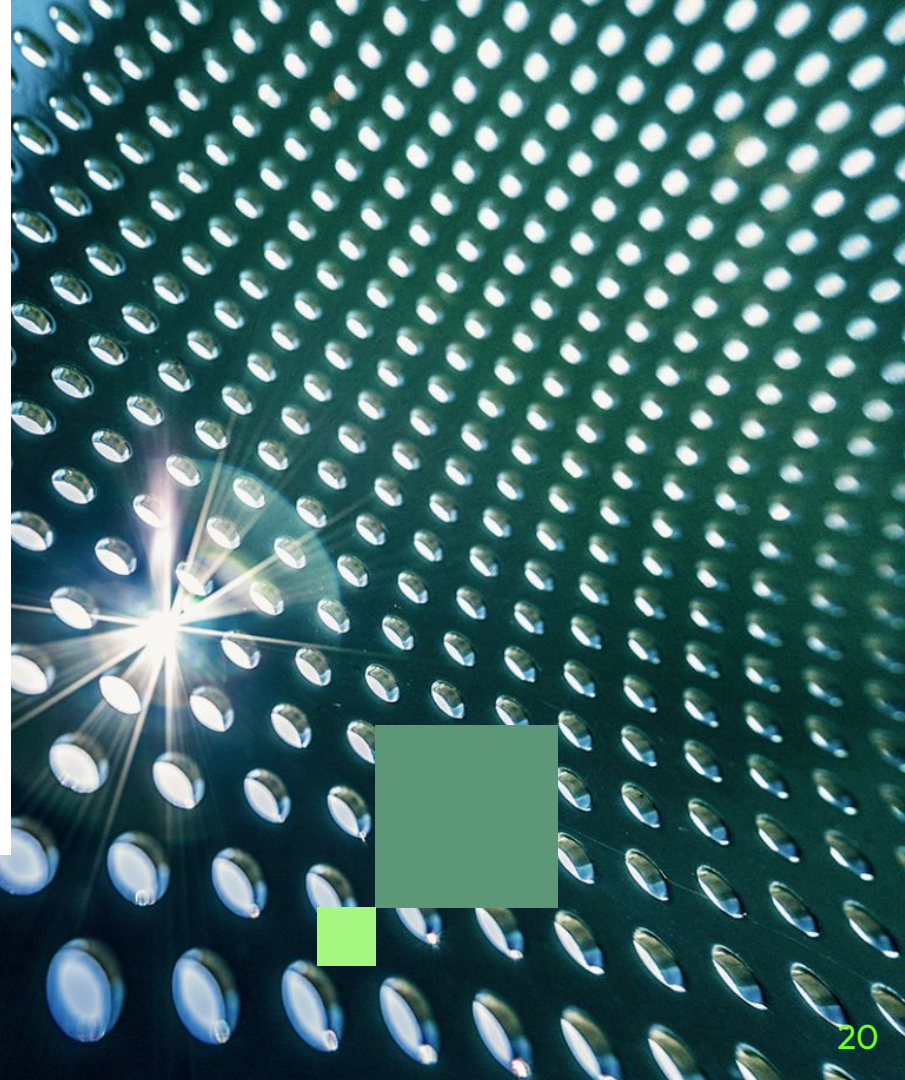
68%

of media experts agree that CTV ads are vulnerable to particularly low rates of **viewability**, for example with ads being served while the TV is off

04

EMERGING MEDIA

Industry experts investigate the role of media quality in retail media networks, gaming, and virtual reality



CONTEXTUAL TARGETING WILL PROTECT PRIVACY ON RETAIL MEDIA NETWORKS

Nearly 7-in-10 media experts continue to express concerns surrounding data privacy and consumer targeting in retail media networks (RMNs).

Contextual targeting allows advertisers to reach relevant consumers based on context, emotion, and sentiment of content, protecting campaign KPIs without privacy infringement.

RETAIL MEDIA

PRIVACY

68%

of media experts agree privacy concerns will continue to limit consumer targeting on retail media networks

CONTEXTUAL TARGETING

58%

of media experts agree that contextual targeting will be critical to achieve campaign KPIs on RMNs without infringing on privacy concerns

MEDIA QUALITY MEASUREMENT WILL BE ESSENTIAL IN GAMING ENVIRONMENTS

Because in-game ad measurement technology is still relatively new, the extent of brand safety concerns in this medium is yet to be fully understood.

But measuring media quality, like viewability and invalid traffic, in these early stages can help us better understand and protect against developing risks.

GAMING

MEASUREMENT

71%

of media experts say it will be important to measure media quality for immersive gaming ads

BRAND SAFETY

38%

of media experts say brand safety will be a growing concern as the volume of gaming inventory grows

BRAND SUITABILITY WILL BE EFFECTIVE IN GAMING

GAMING

Nearly 3-in-4 media experts believe that it will be critical to place ads in games without disrupting the gaming experience. Brand suitability products, like Contextual Targeting, can address this concern by placing in-game ads in environments that are relevant for the advertised brand.

73%

of media experts say it will be critical to understand how to place ads in games without disrupting the gaming experience

Plus, the majority of gamers (61%) prefer to see in-game ads that are related to the content of the game they're playing. And contextually matched ads drive results: 57% of gamers are likely to **purchase** from a brand whose in-game ads are relevant to the content of the game.⁶

35%

of media experts say brand suitability will be an important strategy to boost campaign performance

BRAND SAFETY AND SUITABILITY STRATEGIES WILL BE IMPORTANT FOR AUGMENTED/VIRTUAL REALITY

AUGMENTED/VIRTUAL
REALITY (AR/VR)

BRAND SUITABILITY

40%

of media experts say brand suitability will be an important strategy to boost AR/VR campaign performance

VIEWABILITY

37%

of media experts say viewability will be an important metric for evaluating AR/VR campaign performance

BRAND SAFETY

36%

of media experts say brand safety will be a growing concern as the volume of AR/VR inventory grows



05

AI-DRIVEN DISRUPTIONS

Media experts weigh in on how generative
AI may disrupt media quality

THE RISE OF DEEPPFAKES THREATENS BRAND SAFETY

As generative AI technology becomes increasingly refined, a new threat has emerged in digital media: deepfakes.

AI-fabricated videos of political leaders leading up to the presidential election showcased this risk in 2024.² Deepfake content is likely to increase in the coming years as AI technology becomes more widely available.

To address these concerns and protect brands, third party measurement and optimization platforms are developing brand safety tools to detect and avoid advertising adjacent to deepfakes.⁷

76%

of media experts agree that third party measurement will be important to protect ads from being served alongside deepfakes

20%

of media experts agree that advertising adjacent to deepfakes will represent the most serious threat to media quality over the next 12 months

Deepfakes are images, videos, or recordings that have been convincingly altered and manipulated to misrepresent someone as doing or saying something that was not actually done or said.

MADE-FOR-ADVERTISING SITES ARE A **GROWING RISK** THAT THREATEN TO WASTE AD SPEND

68%

of media experts agree that generative AI tools will make it easier to create MFA sites, accelerating the need to measure and avoid advertising on these sites

Made-for-advertising (MFA) sites are a growing threat to campaign efficiency, claiming 13% of U.S. and global programmatic ad spend in Q2 2024.⁸

Generative AI tools are likely to make it easier for bad actors to create these sites in the coming year — in fact, more than two-thirds of media experts agree that an increased prevalence of these sites will accelerate the need to detect and avoid advertising within them.

Media experts can leverage MFA measurement and optimization solutions to reduce wasted ad spend and drive KPIs.⁹

Made-for-advertising webpages are built to conduct ad arbitrage and feature low quality content (e.g., spam sites or ad farms) created solely to serve ads.

06

PRIORITIZING MEDIA QUALITY

Industry experts discuss the
importance of media quality assurance
and investment in responsible media

TOP MEDIA QUALITY PRIORITIES

49%

BRAND
SUITABILITY*

44%

VIEWABILITY

43%

RESPONSIBLE MEDIA
INVESTMENTS

36%

DRIVING ATTENTION
TOWARDS ADS

99

“Improving **media quality** saves time and resources and also provides faster business results to stand out in the competitive market.”

VP, PUBLISHER

99

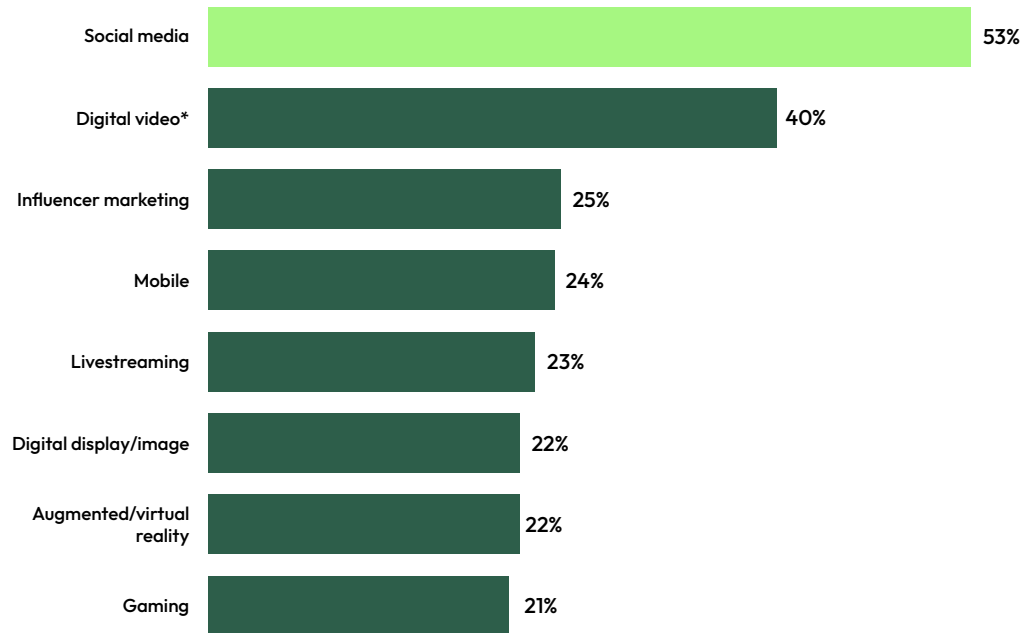
“**Contextual targeting** keeps ads relevant, protects brand image, respects privacy laws, boosts engagement, and avoids negative content, making it a key priority.”

DIRECTOR, AD TECH

MEDIA TYPES MOST VULNERABLE TO BRAND RISK

Social media is seen as the environment most vulnerable to brand safety risks, followed by digital video. Both formats may be particularly vulnerable to brand safety concerns due to their increased risk for generative AI and deepfake content.

Emerging opportunities including influencer marketing, livestreaming, AR/VR, and gaming are also considered vulnerable to brand risk. As these ad inventories increase, media quality risks are likely to keep growing.



WHO IS ACCOUNTABLE FOR KEEPING BRANDS SAFE?

Accountability for brand safety will remain shared across the supply chain in the coming year.

Brands are perceived to be the most responsible for protecting brand safety in 2025. The onus on media measurement and optimization platforms has grown, moving to the second most responsible group, with agencies and publishers trailing closely behind.

37%

ADVERTISERS / BRANDS

33%

MEDIA MEASUREMENT & OPTIMIZATION PLATFORMS

30%

AGENCIES

28%

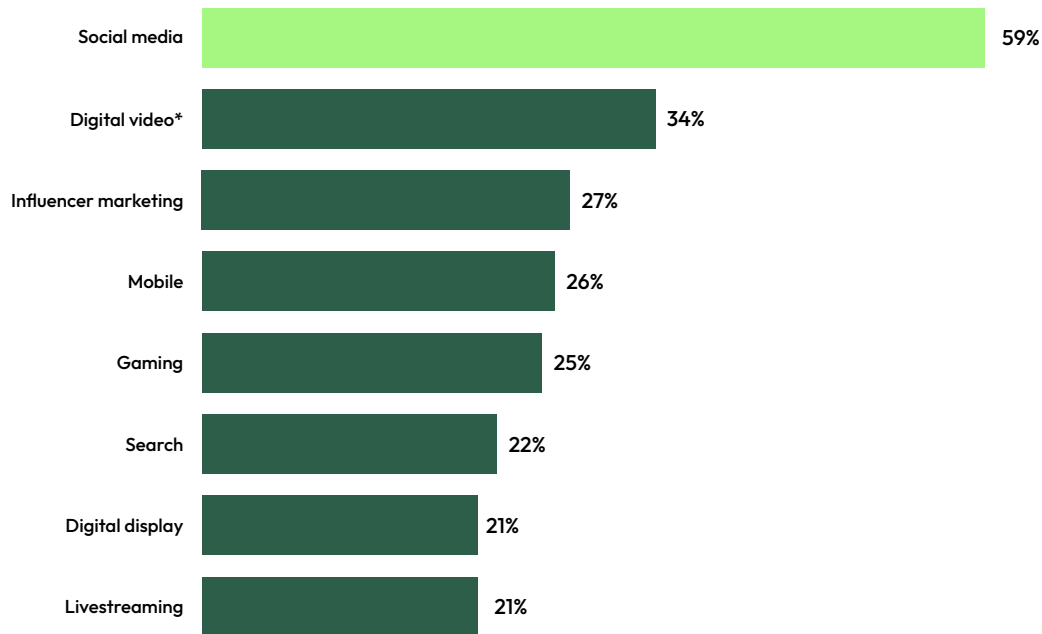
PUBLISHERS

MEDIA TYPES MOST VULNERABLE TO AD FRAUD

Social media is perceived as the environment most vulnerable to ad fraud, with all other media types trailing far behind.

Because social media platforms have a large number of densely packed active users, this may create a lucrative target for ad fraudsters who follow traffic and ad spend.

Juniper report estimates a global advertising loss of over \$20 billion to ad fraud on social media platforms in 2025.¹⁰



WHO IS ACCOUNTABLE FOR MITIGATING FRAUD?

Perceived accountability for mitigating ad fraud continues to be shared across the supply chain, with brands considered to be the most responsible group in the coming year followed closely by media measurement and optimization platforms.

37%

ADVERTISERS / BRANDS

36%

MEDIA MEASUREMENT & OPTIMIZATION PLATFORMS

31%

PUBLISHERS

31%

AGENCIES

MEDIA EXPERTS WILL INVEST IN INTERNET SAFETY WITH RESPONSIBLE MEDIA ASSURANCE

Industry experts plan to increase investments in responsible media including privacy-centered practices, ad campaign inclusivity, responsible journalism, and ad-related carbon footprint reduction.

Measurement and optimization platforms can help advertisers and publishers reach responsible media goals by tracking and reducing ad-rated carbon footprints and offering solutions that protect consumer data privacy, aiding ad campaigns in reaching diverse audiences.

PRIVACY

70%

of media experts agree publishers and advertisers will need to adopt privacy-centered practices to build and maintain consumer trust

DIVERSITY & INCLUSION

70%

of media experts agree reaching diverse audiences will be a major focus for brands to ensure ad campaigns are inclusive

CARBON FOOTPRINT

68%

of media experts agree that third party measurement will be important to help advertisers track and reduce ad-related carbon footprints

MEASUREMENT AND OPTIMIZATION OFFERINGS WILL BE CRITICAL TO MEDIA EXPERTS' 2025 CAMPAIGNS

92% of media experts say at least one measurement and optimization platform offering will help them achieve their 2025 advertising goals.

Viewability and ad fraud measurement and optimization will be the most helpful, providing core media quality assurance.

Measuring the impact of media quality on business results will also be a priority, allowing media experts make media quality optimization decisions based on KPIs.

What measurement and optimization technologies will be most helpful in reaching your 2025 digital advertising goals?

44%

VIEWABILITY AND AD FRAUD

44%

MEASURING IMPACT OF MEDIA QUALITY ON BUSINESS RESULTS

42%

BRAND SUITABILITY TARGETING

39%

PROGRAMMATIC SUPPLY PATH INSIGHTS

07

KEY TAKEAWAYS

KEY TAKEAWAYS

1 SOCIAL MEDIA AND DIGITAL VIDEO REMAIN TOP PRIORITIES

Social media and digital video* are the top two formats media experts plan to prioritize in 2025 while influencer marketing debuts this year as a top priority.

TOP MEDIA PRIORITIES:

61%

SOCIAL MEDIA

43%

DIGITAL VIDEO*

28%

DIGITAL DISPLAY

28%

INFLUENCER
MARKETING

KEY TAKEAWAYS

2 INFLUENCERS AND SHOPPING WILL DRIVE SOCIAL MEDIA GROWTH

Social shopping and influencer marketing will provide opportunities for innovation, but consumer trust and transparency continue to test ad spend on social media platforms.

78%

of media experts agree social shopping traffic will continue to increase

70%

of media experts agree that influencer marketing will become an increasingly important part of social media advertising strategies

57%

of media experts agree that insufficient transparency of media quality metrics will negatively impact media spend in the next 12 months

KEY TAKEAWAYS

3 MEDIA QUALITY MEASUREMENT BECOMES ESSENTIAL FOR EMERGING MEDIA

New and growing media types like gaming and retail media networks will face unique challenges, which industry experts expect to combat using measurement and optimization solutions.

73%

of media experts say it will be critical to understand how to place ads in games without disrupting the gaming experience

71%

of media experts say it will be important to measure media quality for immersive gaming ads

68%

of media experts agree privacy concerns will continue to limit consumer targeting on retail media networks

58%

of media experts agree that contextual targeting will be critical to achieve campaign KPIs on RMNs without infringing on privacy concerns

KEY TAKEAWAYS

4 AI-DRIVEN DISRUPTIONS WILL ACCELERATE, INCREASING THE NEED FOR MEDIA QUALITY MEASUREMENT

As generative AI becomes more available, it will increase the risk of deepfakes and MFA sites. Third party measurement and optimization will be critical to help protect brands against these risks.

76%

of media experts agree that third party measurement and optimization will be important to protect ads from being served alongside deepfakes

68%

of media experts agree that generative AI tools will make it easier to create MFA sites, accelerating the need to measure and avoid advertising on these sites

20%

of media experts agree that advertising adjacent to deepfakes will represent the most serious threat to media quality over the next 12 months

KEY TAKEAWAYS

5 BRAND SUITABILITY WILL BE A TOP MEDIA QUALITY PRIORITY

Brand suitability and viewability emerged as the top media quality priorities in 2025. Media experts also plan to invest in responsible media in the coming year.

TOP MEDIA QUALITY PRIORITIES:

49%

BRAND SUITABILITY*

44%

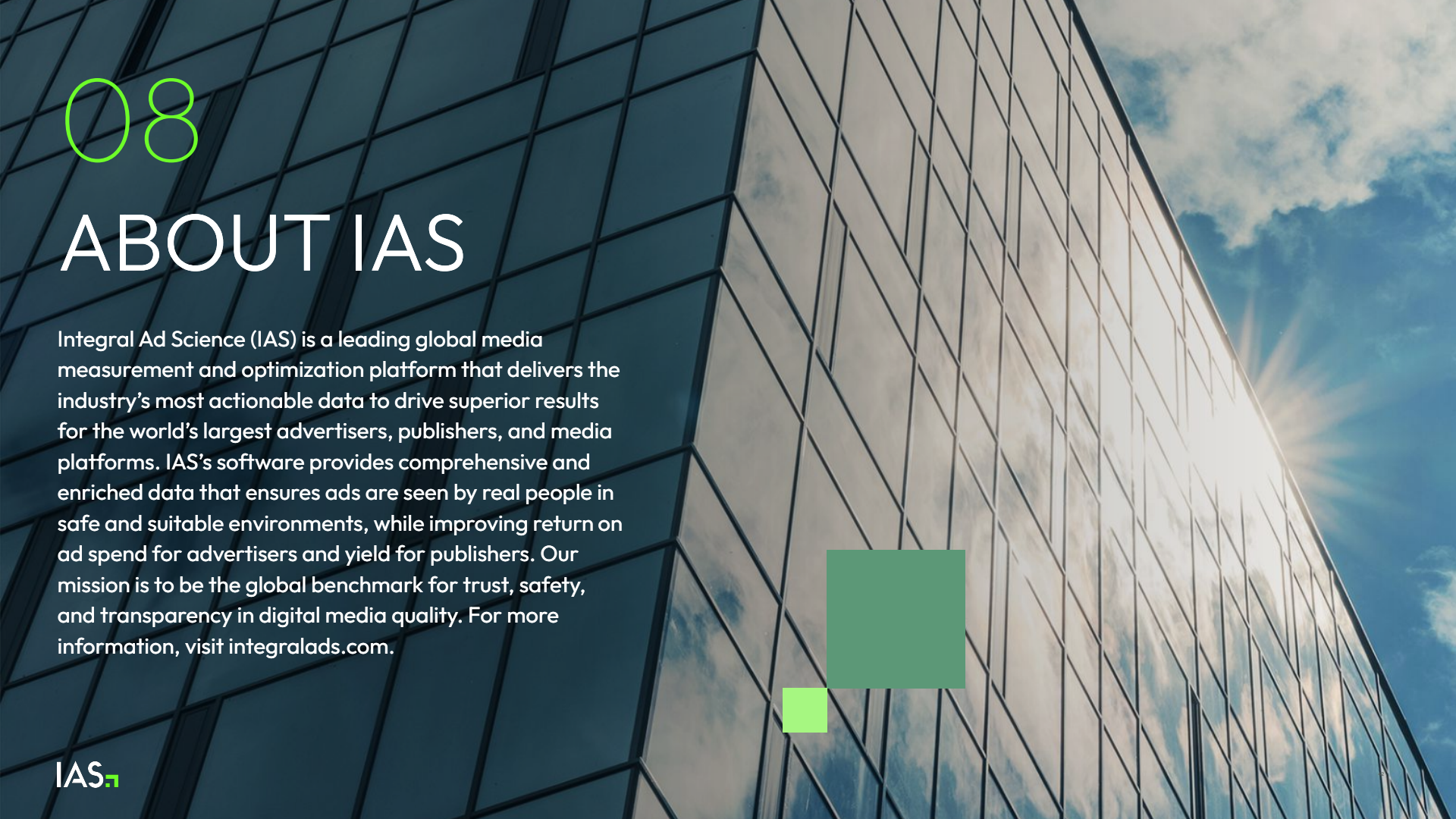
VIEWABILITY

43%

RESPONSIBLE MEDIA
INVESTMENTS

36%

DRIVING ATTENTION
TOWARD ADS



08

ABOUT IAS

Integral Ad Science (IAS) is a leading global media measurement and optimization platform that delivers the industry's most actionable data to drive superior results for the world's largest advertisers, publishers, and media platforms. IAS's software provides comprehensive and enriched data that ensures ads are seen by real people in safe and suitable environments, while improving return on ad spend for advertisers and yield for publishers. Our mission is to be the global benchmark for trust, safety, and transparency in digital media quality. For more information, visit integralads.com.

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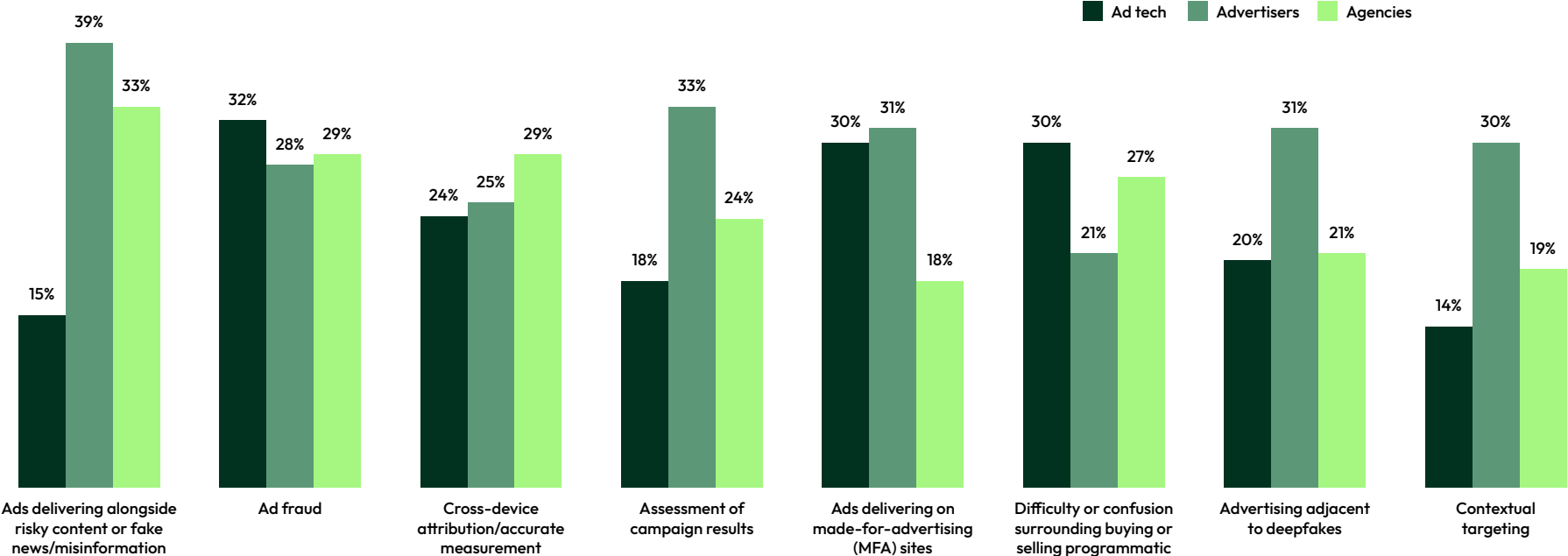
09

APPENDIX



CHART 1. TOP ANTICIPATED MEDIA CHALLENGES: ADVERTISERS, AGENCIES, & AD TECH

Data breakout by company type





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