

# From chaos to Clarity

Unlocking the power of  
data-driven marketing

2025 Annual Marketing Report

◀▶ Nielsen



# Table of contents

## Introduction

03

Section 1: Rolling with the punches

## Trends to watch in global advertising

04

Section 2: Finding the sweet spot

## The great marketing balancing act

12

Section 3: Seeing things clearly

## Measuring success in a changing world

20

## Conclusion

28

## About

29

# Introduction

Many expected 2025 to be a dynamic year for marketers. AI's rapid evolution and the rise of shoppable advertising are presenting exciting opportunities—and challenges. But 2025 has also seen shake ups in the global supply chain and consumer sentiment<sup>1</sup>, and the ad industry hasn't been immune to such fluctuations.<sup>2</sup>

It's difficult to make long-term marketing plans when you don't know if you'll have products on the shelf in the coming months, and at a price consumers can afford.<sup>3</sup>

But marketers are built for times like these. They know how to adapt to sudden changes, shifting budgets, advertising channels and strategies to stay engaged with customers through thick and thin. They also know that companies that continue to invest in advertising throughout the ups and downs often emerge stronger.

This is the seventh edition of our Annual Marketing Report, and despite current uncertainty in the marketplace, the findings this year show that most marketers around the world have the right attitude, the right plans and the right tools to succeed.

For this report, we surveyed 1,400 leading marketers to find out what their priorities are this year and offer a guiding light to marketers like you who still need to take action even as things keep changing. They shared crucial insights in three key areas:



## Rolling with the punches

Marketers are resilient, and they have many options at their disposal to shift spending in times of crisis. We'll review growing trends around the world.



## Finding the sweet spot

It's a great time to remember that marketing is a balancing act between branding and performance. Successful brands today are planning their media mix to drive short-term growth without losing sight of the big picture.



## Seeing things clearly

You can't find your way out of the fog without a compass. Marketers know what they need to do to measure the success of their cross-media campaigns, but they're unsure about what tools to use. We can change that.

**Find out how marketers like you are navigating the chaos and bring clarity to your own plan of action.**

<sup>1</sup> University of Michigan - [Survey of Consumers](#) (Apr 2025)

<sup>2</sup> MAGNA Global. [MAGNA Releases U.S. Advertising Forecast Spring 2025 Update](#) (Mar 2025)

<sup>3</sup> Kelley Blue Book. [Amid tariff changes, cars piling up at ports](#) (Apr 2025)

# Trends to watch in **global advertising**



## Section **1** Rolling with the punches

# Over half of global marketers plan to reduce ad spend this year

After a strong year in 2024,<sup>4</sup> many marketers were already preparing for a leaner 2025. The additional uncertainty injected into the global economy has now cemented many marketers’ plans.

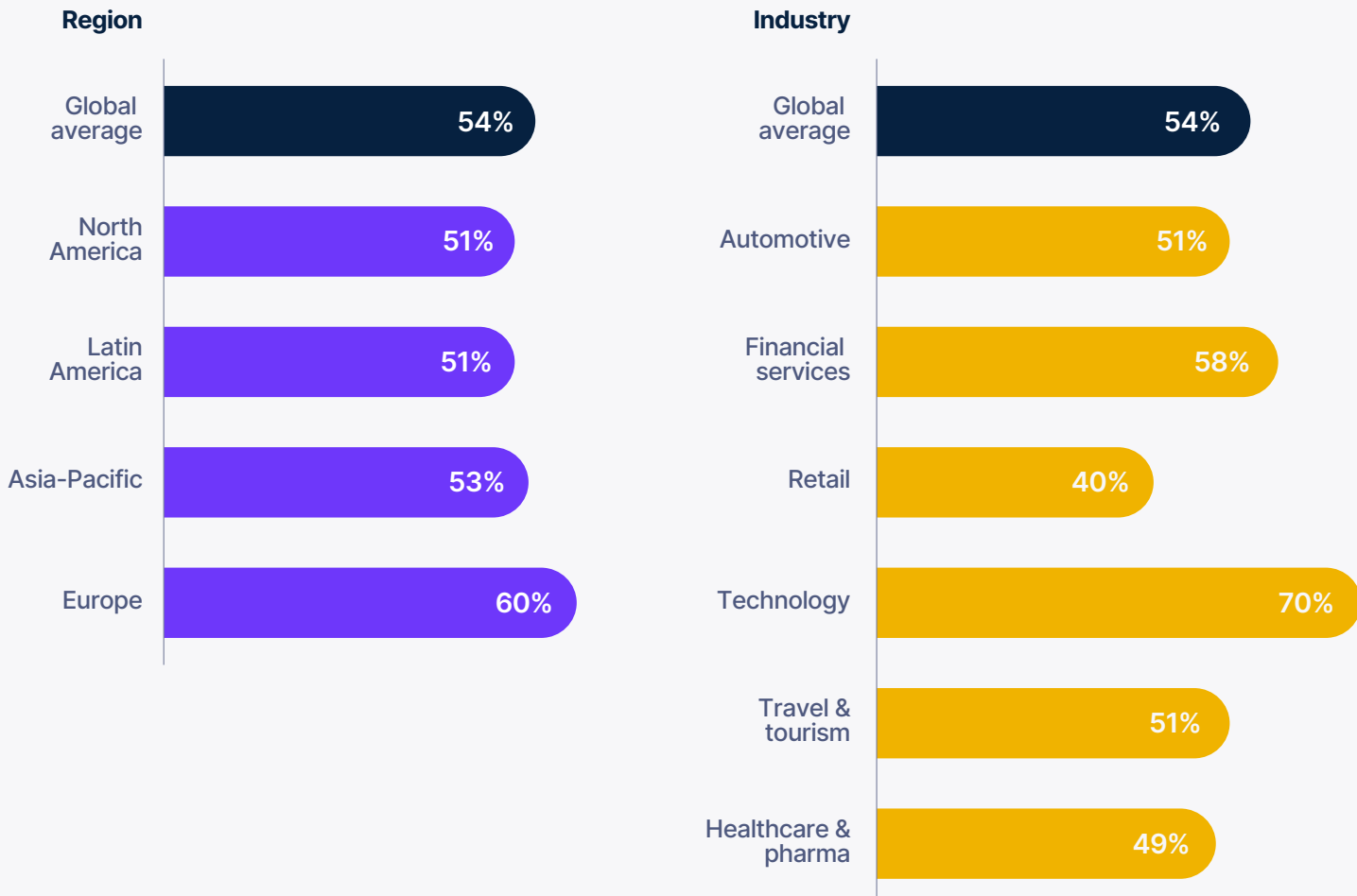
**Over half (54%) of global respondents are planning to cut ad spending in 2025.** No region or sector of the economy is immune, as figure 1.1 illustrates, but the rationales are likely different.

Tech companies are responding to global supply-chain tensions, while financial firms are reacting to dropping consumer confidence and, in the U.S., a challenging housing market.<sup>5</sup> European marketers, for their part, continue to contend with sluggish local economies and the conflict in Ukraine.

No matter the reason, many companies will be working with tighter ad budgets this year. But smaller budgets don’t always translate to reduced targets or goals. That means marketers will need to be more efficient with their media spend to maintain (or even grow) their results.

<sup>4</sup> Group M. GroupM’s end-of-year global advertising forecast projects 9.5% growth in total 2024 advertising revenue (Dec 2024)  
<sup>5</sup> J.P.Morgan. The outlook for the US housing market in 2025 (Feb 2025)

Figure 1.1  
**Share of marketers likely or very likely to reduce ad spend in 2025**  
By region and industry



Source: 2025 Nielsen Global Annual Marketing Survey

# Every industry has its own set of strategies

Besides reducing ad spending, what other tactics are marketers using for their media strategies in 2025?

Many are shifting to less expensive channels, switching to a more digital media mix, placing more emphasis on performance campaigns, and shifting to newer channels (like CTV or influencer marketing). But the variations by industry are noteworthy.

Retail brands, for instance, are more likely to turn to digital channels than their peers, tech and finance brands are more likely to focus on performance. Auto and pharma companies, for their part, remain attached to brand building on more expensive channels, like linear TV, but seem willing to switch at least a portion of their budgets to newer media platforms like CTV.

Figure 1.2  
Share of marketers likely or very likely to employ tactics in 2025  
By industry



Source: 2025 Nielsen Global Annual Marketing Survey

# Digital continues to capture ad spend

As marketers plan to reduce ad spend this year, many will continue to increase investments in digital channels, but at lower rates.

The channels at the top of the list are the same as last year<sup>6</sup> (social media, display, video ads and search), but compared to last year, fewer marketers are planning major budget increases on digital channels in 2025.

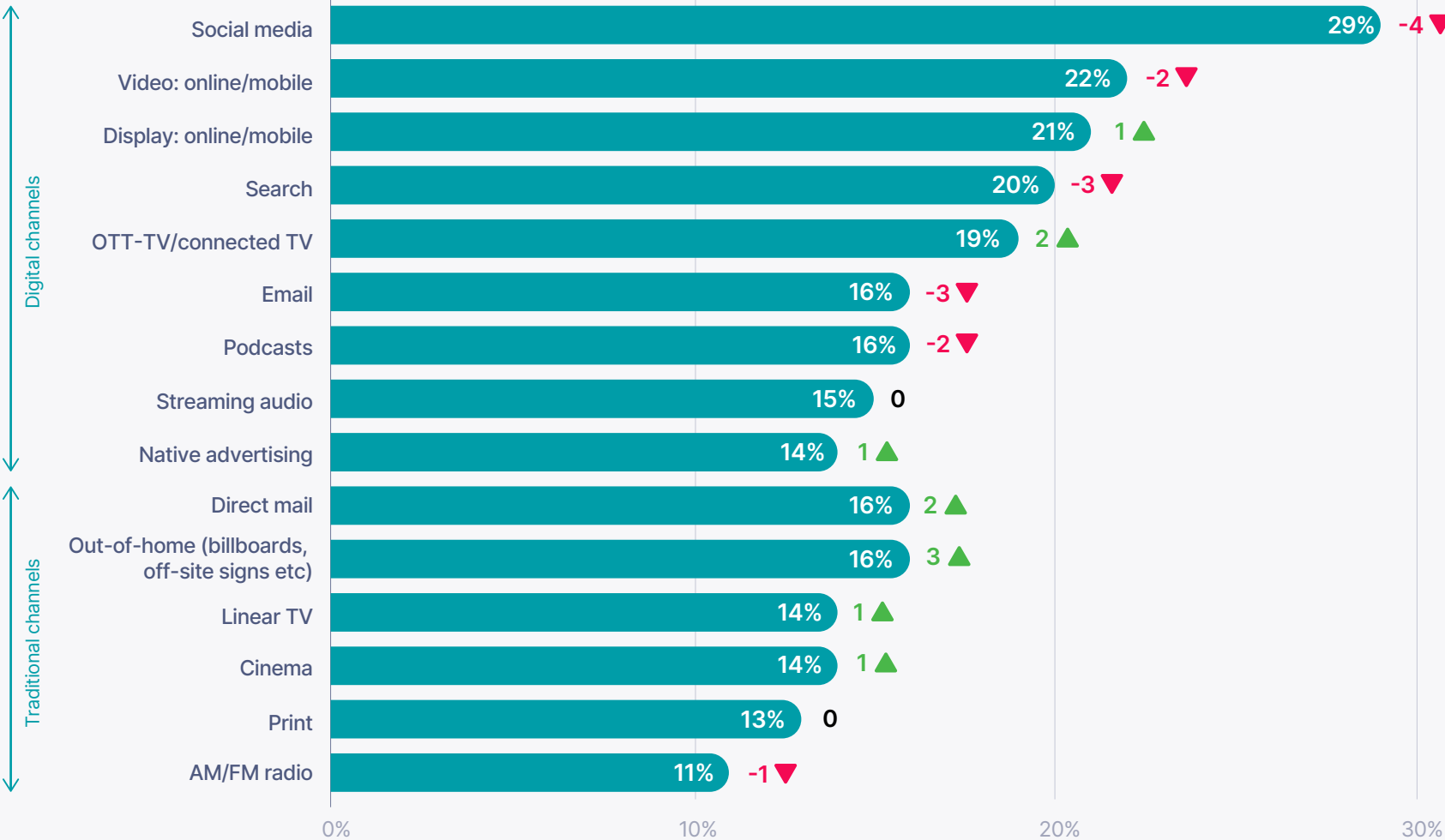
Comparatively, more marketers are planning substantial increases (over 50%) to their traditional media budgets than they did last year. In particular, 16% plan to increase their out-of-home budget by over 50% this year, a 3-point increase from 2024.

**New budgets still go predominantly to digital channels, but not at the same rate as last year.**

<sup>6</sup> Nielsen. 2024 Annual Marketing Report (April 2024)

Figure 1.3  
**Share of marketers planning to increase budget on each channel by more than 50% in the next 12 months compared to last year**

Global



Read as: 29% of global marketers plan to increase social media spend by more than 50% in the next 12 months, a 4-point decrease compared to last year's survey.  
Source: 2025 Nielsen Global Annual Marketing Survey; 2024 Nielsen Global Annual Marketing Survey



# Connected TV is transforming television

One of the big developments in advertising in recent years of course has been the rise of streaming and connected TV (CTV), not just as a vibrant new viewing platform for TV content but as a healthy advertising platform in its own right.

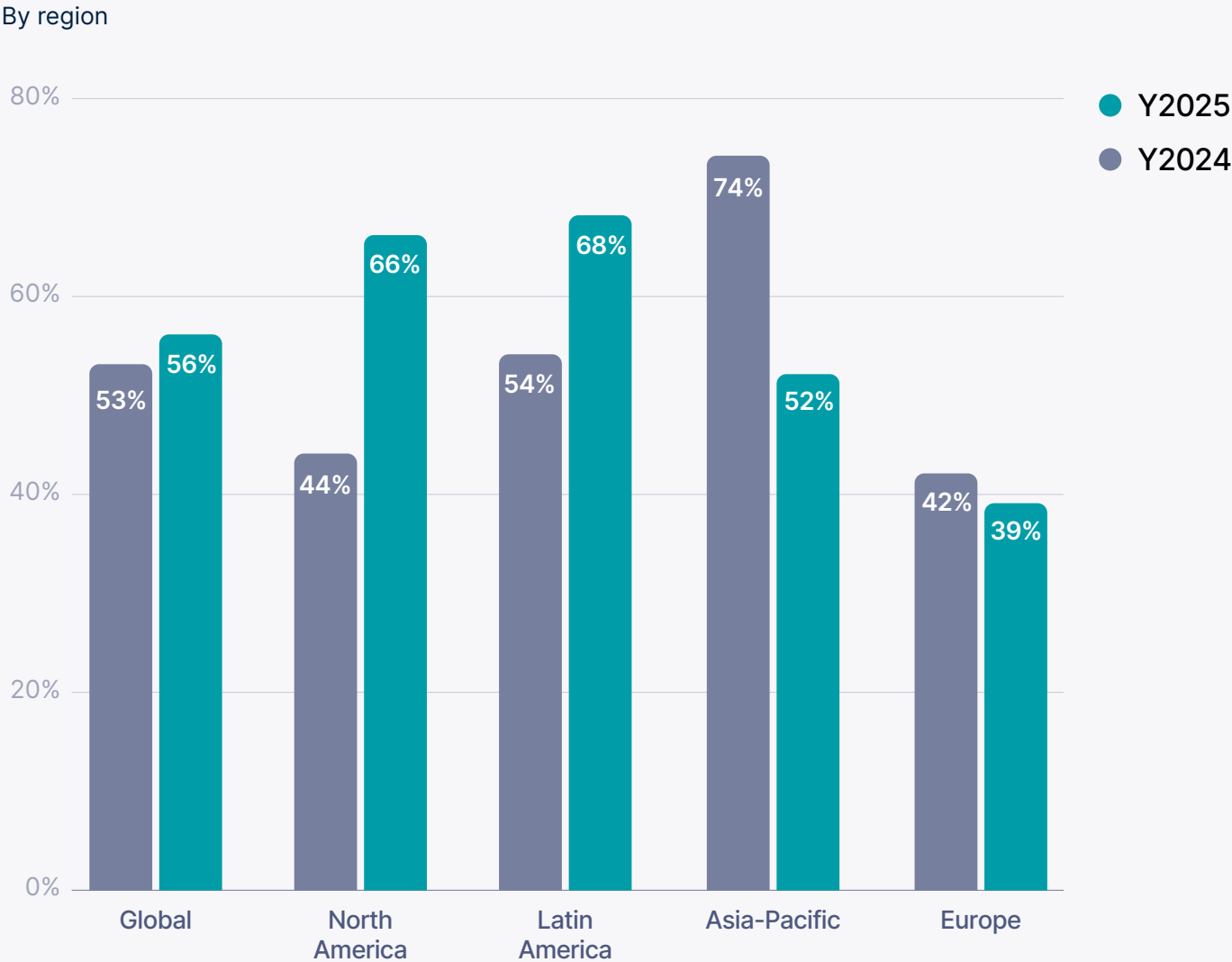
Globally, 56% of marketers report planning to increase their spending on over-the-top (OTT)/CTV in 2025, up slightly from 53% in 2024. This makes it one of the few digital channels where the share of global marketers reporting increases in spending grew year-over-year, with the biggest growth in the Americas.

While streaming use differs from one country to the next<sup>7</sup>, its popularity continues to grow around the world. **In the U.S., streaming is now responsible for 42.4% of ad-supported viewing time.**<sup>8</sup>

Thanks to much-improved reach and targeting capabilities, streaming platforms now offer a real alternative—or better yet, a natural companion channel—to advertisers looking to build up the ROI of their linear TV campaigns. And with U.S. revenues expected to reach over \$17 billion this year (+25%),<sup>9</sup> it's also less likely to be impacted by tariffs than other channels.<sup>10</sup>

<sup>7</sup> Nielsen. [3 key media convergence trends](#) (Q1 2025)  
<sup>8</sup> Nielsen's [The Gauge](#) (Q1 2025)  
<sup>9</sup> TVREV. [Analyst cuts ad spending forecast, with streaming gaining while broadcast and cable decline in 2025](#) (Mar 2025)  
<sup>10</sup> eMarketer. [How tariffs will impact different ad channels](#) (Apr 2025)

Figure 1.4  
Share of marketers planning to increase their OTT/CTV spend in the next 12 months



Note: Includes planned increases of any size.  
Source: 2025 Nielsen Global Annual Marketing Survey; 2024 Nielsen Global Annual Marketing Survey



# Retail media is quickly becoming a full-funnel channel

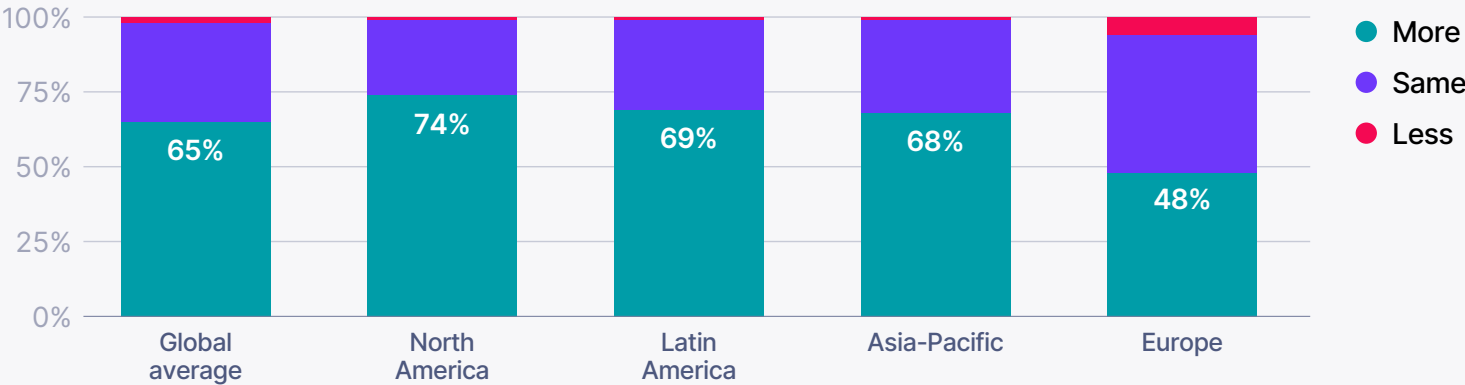
In 2025, retail media networks (RMNs) are not an industry buzzword anymore, and many specialized networks have started to step out from the shadow of Amazon and Walmart in recent years.<sup>11</sup> They're not limited to retailers either. From travel to finance and ride-sharing apps, market leaders are capitalizing on their first-party data to offer advertising partners a new platform to reach their unique audiences.<sup>12</sup>

Building on recent success, **two-thirds of marketers (65%) see RMNs playing a growing role in their media strategy this year**, with a high of 74% in North America and a low of 48% in Europe.

Asia-Pacific marketers tend to use RMNs for bottom-funnel applications and European marketers for top-funnel use cases, but **most are now taking advantage of RMNs across the entire consumer journey**, especially in the Americas.

<sup>11</sup> Digiday. How smaller retail media networks are stepping out from the shadow of Amazon and Walmart (Mar 2025)  
<sup>12</sup> Nielsen. Need to Know: What are retail media networks, and why is everybody talking about them? (Jun 2024)

Figure 1.5a  
**Are RMNs more or less important to your media strategy in 2025?**  
By region



Source: 2025 Nielsen Global Annual Marketing Survey

Figure 1.5b  
**What role do RMNs play in your overall marketing strategy?**  
By region



Source: 2025 Nielsen Global Annual Marketing Survey

# AI is expected to have a big impact on how campaigns are run

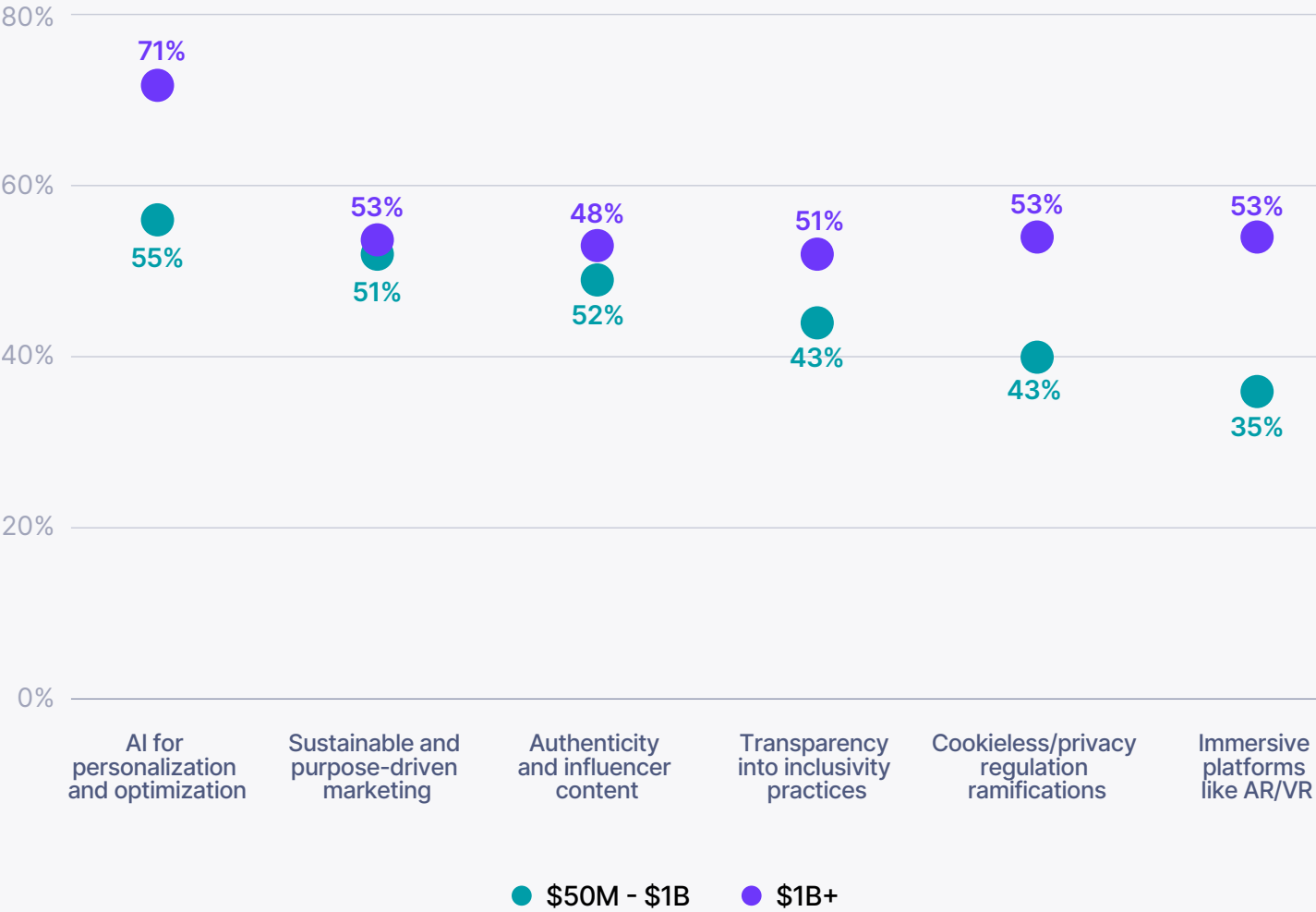
Marketers across all regions are paying special attention to AI and the impact it’s likely to have on their ability to create content, personalize campaigns, optimize media plans, perform predictive analysis, and streamline other key marketing functions.

GroupM CEO Brian Lesser made waves earlier this year when he pointed to a future powered by AI connectivity, and suggested that within five years, “human hands wouldn’t touch a media plan anymore.”<sup>13</sup> The provocative statement touched a nerve, but there’s no doubt that many marketers are counting on AI to help them do their job better—and free up their time to capitalize on higher value opportunities.

While AI is by far the most watched trend on the list for brands with large ad budgets, it’s interesting to note that smaller brands are just as curious to explore sustainable and purpose-driven marketing, followed closely by authenticity and influencer content. Both of these present ways for them to stand out while their bigger competitors are pursuing automation.

<sup>13</sup> Adweek. GroupM CEO Brian Lesser lays out his plan for the agency giant’s future (Jan 2025)

Figure 1.6  
**Other trends likely to have a big impact in 2025**  
By company budget size



Source: 2025 Nielsen Global Annual Marketing Survey

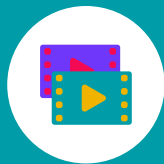
# Key takeaways



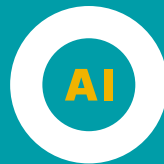
As you consider key tactics to incorporate into your marketing strategy—from reduced ad spend to switching to digital channels, selecting less expensive channels, prioritizing performance-driven campaigns, and experimenting with new channels—remember that **each industry is plotting a different path**. Understanding how your industry is changing tactics can help your business stand out. **Nielsen Ad Intel** can help you understand your competitive landscape.



More companies are using retail media networks as **full-funnel advertising platforms** now, not just as low-funnel conversion engines. Still, regional differences persist. Leaning into these platforms can help marketers at both ends of the funnel, but understanding how competitors are using them can help you make smarter decisions.



Streaming is growing in popularity in countries around the world and is expected to weather economic changes **better than other channels**. Not surprisingly, globally, marketers are planning to increase their spend on the channel. But not all regions are expecting the same growth in spending. Consider how streaming fits into total TV viewing in your market as you lean into this channel. In the U.S., **The Gauge**, built on Nielsen’s **television** and **streaming** measurement, now explores TV viewing by platform, distributor and ad-supported.



Marketers have high hopes that AI will help them streamline a number of time-consuming media operations, keep costs under control, and **be more competitive**. Companies with big budgets in particular are seeking to use AI as a path to optimize and drive growth. While all companies will need to incorporate automations, marketers at companies with smaller budgets may benefit from focusing more on standing out by focusing on purpose in their marketing and collaborating with influencers.



Nielsen has the tools and expertise to help you see through the clutter and outsmart your competitors. See how at the **end of the report**.



Section

# 2

**Finding the  
sweet spot**

**The great  
marketing  
balance act**

# The sweet spot between the top and bottom of the funnel is different by region

Successful marketers don't go out and spend money without a clear objective in mind. In 2025, that means, above all else, deciding between growing bottom-of-funnel revenue for their brand or developing top-of-funnel awareness, as figure 2.1 shows.

Most organizations try to find the **sweet spot** for their business within the marketing funnel, and that happens to be right in the middle for North American brands: The exact same proportion of marketers in the region (48%) lists revenue growth and brand awareness as their first or second priorities. Latin American marketers, on the other hand, give a slight edge to brand awareness.

Meanwhile, in Europe, marketers overwhelmingly favor revenue growth this year. They are also prioritizing customer retention more so than new customer acquisition, which speaks to the current state of consumer markets in the region.<sup>14</sup>

Similar to North America, marketers in Asia-Pacific are fairly evenly split, with revenue growth edging out slightly. But their interest in customer acquisition is higher than in customer retention.

Ultimately, a full-funnel approach that invests in brand building can help drive long-term ROI and moderate the cost of new customer acquisition.

<sup>14</sup> Forrester, [Customer obsession builds in Europe](#) (July 2023)



Source: 2025 Nielsen Global Annual Marketing Survey

# Finding the right tactics for brand and performance

When it comes to finding the sweet spot between top and bottom of funnel initiatives, the tactics marketers use across regions also differ.

Globally, allocating specific budgets to brand-building initiatives is helping marketers ensure that long-term objectives are receiving the attention they deserve. This is especially true for Asia-Pacific and North America.

In Latin America, however, marketers are most focused on using separate KPIs for short- and long-term goals. Europe, meanwhile, with the region's heavier focus on revenue growth is prioritizing optimizations based on campaign performance.

Figure 2.2

## How does your company balance brand building and performance marketing?

By region



Source: 2025 Nielsen Global Annual Marketing Survey



# More balance between digital and traditional channels

Another tough balancing act for marketers to master is between digital and traditional channels.

As we saw in section 1, digital today continues to benefit from increases in ad spending—in fact, GroupM put the global estimate at 72.9% at the end of 2024.<sup>15</sup> How much higher can it get? The scales may be evening out.

We asked respondents in this year's survey how much of their paid media budget they planned to allocate to digital channels this year, and **the picture is remarkably level**: 24% of global marketers said they would continue to tip the scales heavily towards digital, 32% said they would go more traditional, but by far the largest group (44% of respondents) gave a balanced answer in the 40%-60% range.

Figure 2.3 shows that the region with the most even distribution at the moment is Latin America, and that marketers in North America are actually planning to invest slightly less in digital this year than their counterparts around the world.

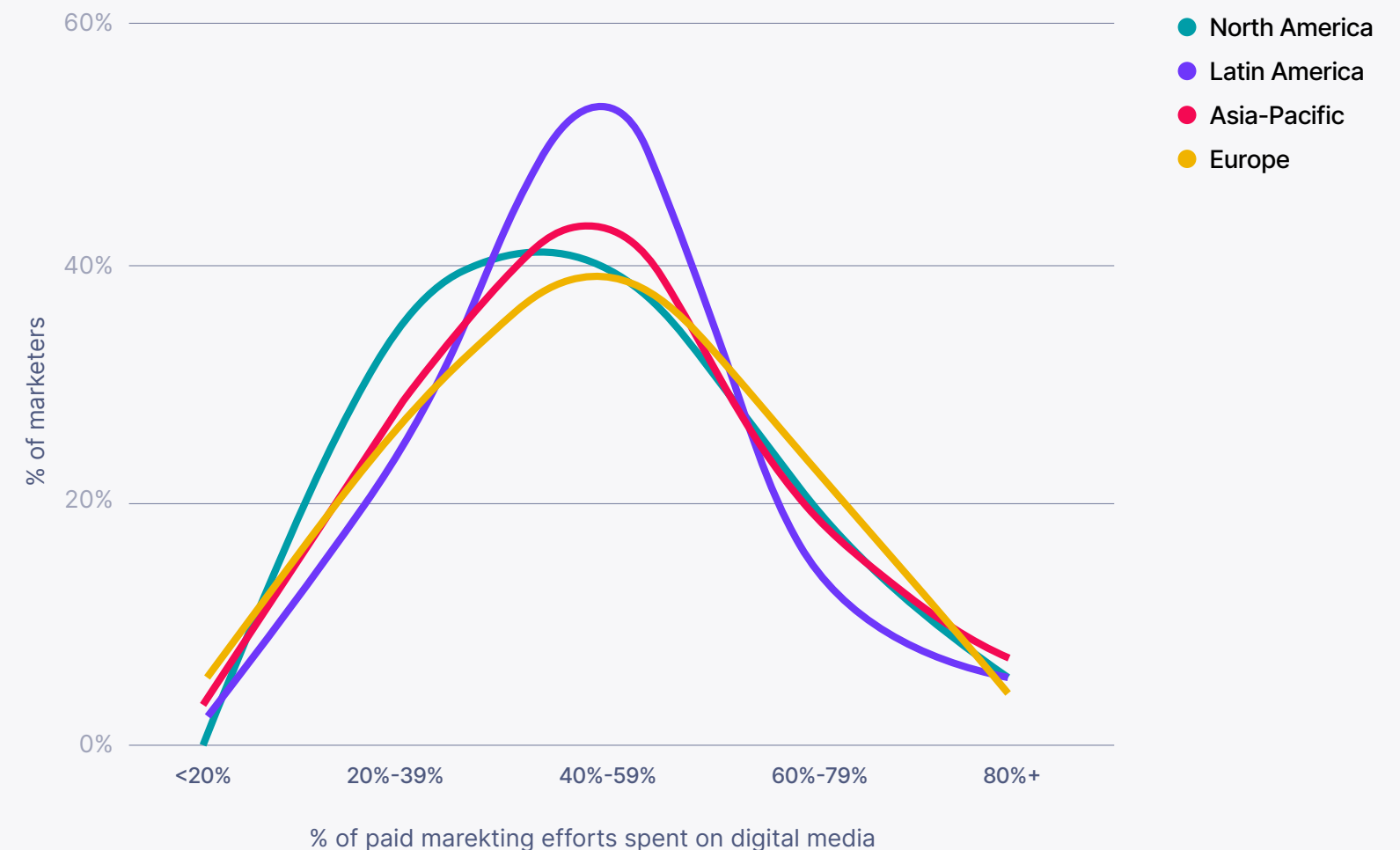
**Don't count out traditional channels quite yet.**

<sup>15</sup> GroupM. GroupM's end-of-year global advertising forecast projects 9.5% growth in total 2024 advertising revenue (Dec 2024)

Figure 2.3

## Share of paid marketing budget going to digital channels (vs. traditional channels)

By region



Source: 2025 Nielsen Global Annual Marketing Survey



# Traditional channels are still key to building and maintaining brand awareness

Some industries still rely heavily on traditional channels to reach their audiences, and it's a formula that continues to deliver results.

Take healthcare & pharma brands, for instance. These products tend to be complex and their ads heavily regulated in the countries where they're marketed. Traditional channels like linear TV, radio or direct mail give them the **space they need to make their pitch**. Their target audiences are generally older too—and thus more likely to be found watching linear TV than swiping through social media.

**Sports** or **news** programs, in particular, continue to draw audiences to linear television, providing mass reach and broad awareness for advertisers.

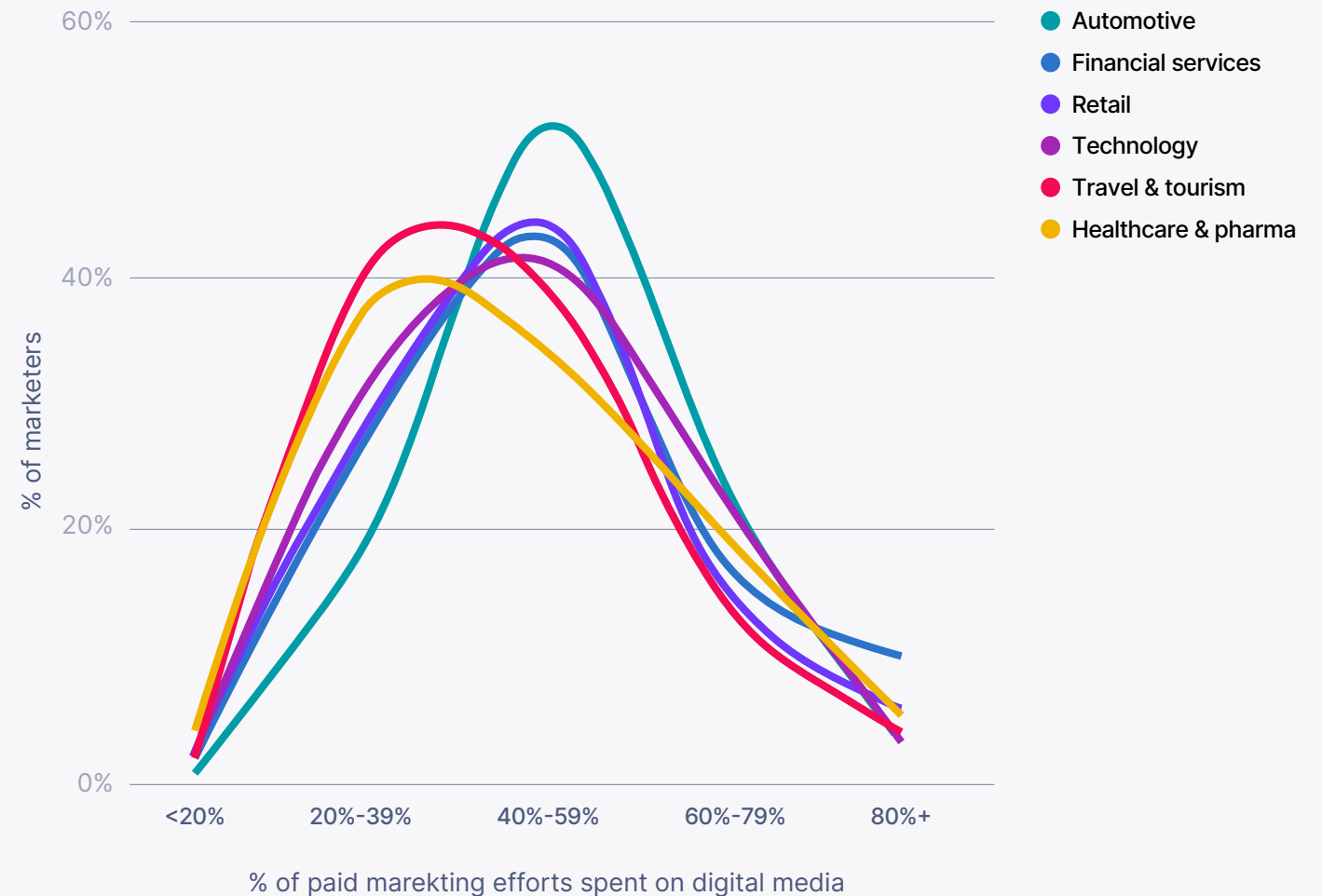
Travel caught our eye because travel brands typically have plenty of first-party data to target consumers more directly on digital channels. Last year already, travel brands globally reduced their online ad spend by 4% and increased their TV spend 11%.<sup>16</sup> It shows the **enduring value of traditional channels to build and maintain brand awareness**, even for well-known brands like Airbnb, Hilton, Royal Caribbean or Uber.

<sup>16</sup> Source: Nielsen Ad Intel (global)

Figure 2.4

## Share of paid marketing budget going to digital channels (vs. traditional channels)

By industry



Source: 2025 Nielsen Global Annual Marketing Survey

# Different markets require different balances

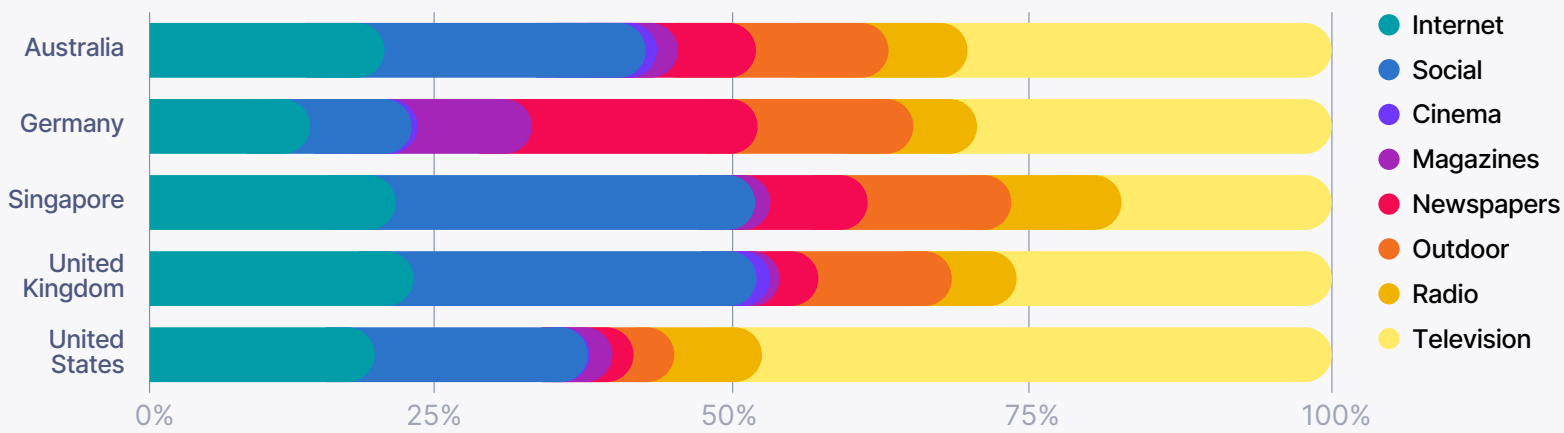
To understand how industries split their media budgets between digital and traditional channels, and how those budget allocations vary from region to region, and country to country, there's no substitute to actual ad expenditure data captured at the source in each market.

Using competitive ad intelligence from **Nielsen Ad Intel**, we can see that social media is big in the U.K. and in Singapore, for instance, and that print is still a major advertising channel in Germany. And for all the talk about their demise, TV and radio still accounted for 56% of all ad spend in the U.S. in 2024.

At the industry level, the lionshare of ad spend last year came from entertainment brands in Singapore and Australia, and FMCG brands in Germany. The U.S. continues to have a greater diversity of advertisers than any other major economy.

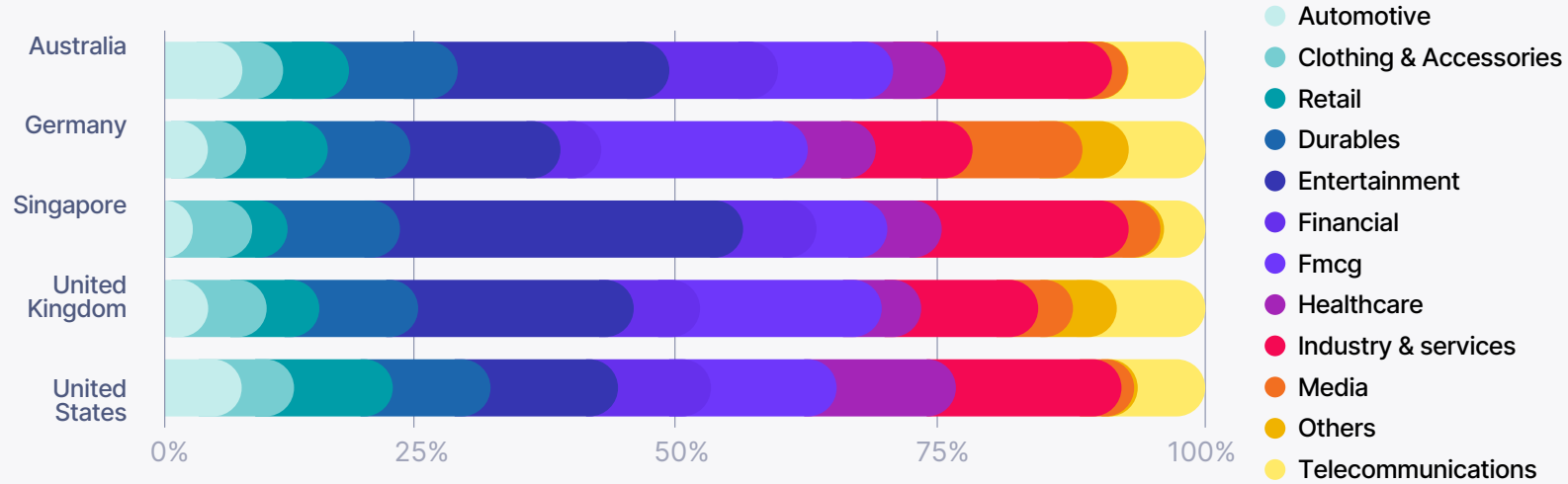
<sup>17</sup>Note: Durables include technology, software, appliances, furnishings, etc. Industry & services includes education, energy, government institutions, other business services, etc.

Figure 2.5a  
Share of ad spend by channel for select countries in 2024



Source: Nielsen Ad Intel International (Full year 2024)

Figure 2.5b  
Share of ad spend by industry for select countries in 2024



Source: Nielsen Ad Intel International

Full year 2024<sup>17</sup>

# Is perception getting in the way of the truth?

Putting together a winning media mix is not an easy exercise, but there's something very straightforward at the heart of it: marketers invest in channels they perceive to be effective and stay away from those that seem ineffective for the task at hand.

The correlation is very clear on figure 2.4. It's also very clear that **digital channels as a group are perceived as more effective than traditional channels. But the operative word is 'perceived.'**

Digital channels are generally perceived to be easier to measure (even though they often rely on proprietary KPIs), less expensive (even though a lower CPM is no guarantee of ROI), and closer to the bottom of the funnel (and thus more likely to take credit for a conversion).

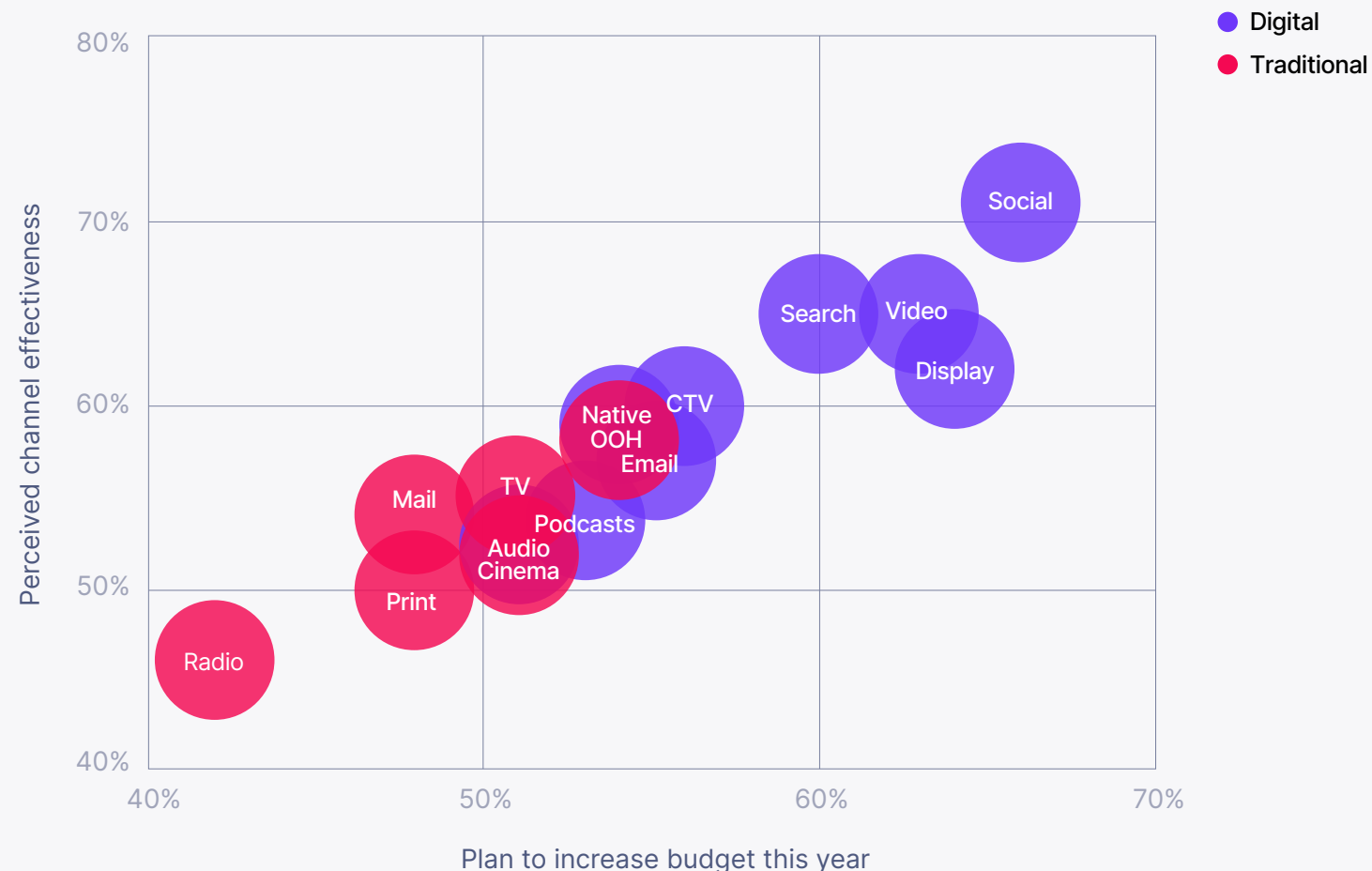
But traditional channels can be powerful drivers of ROI. While marketers view radio as less effective, the channel has the fourth highest average ROI globally compared to other media types, based on Nielsen Compass norms.

Digital channels absolutely belong in a modern media plan, but their value needs to be assessed using objective criteria and a good understanding of cross-media synergies. Let's explore those critical measurement questions in the next section of this report.

Figure 2.6

## Correlation between budget increase and perceived effectiveness

By channel



Source: 2025 Nielsen Global Annual Marketing Survey

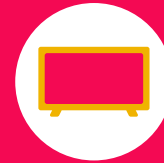
# Key takeaways



Revenue growth and brand awareness are **two sides of the same coin**, even though every region has a different set of priorities at the moment. Explore tactics that can help you prioritize brand building while driving down-funnel ROI. **Nielsen ONE** can help you measure the full consumer journey.



Most advertisers recognize that digital and traditional channels bring different, but complementary, benefits to their campaigns, and their media investments are looking **more balanced this year**. Each medium has unique strengths. Recognize the power of integrating both digital and traditional elements in your marketing mix, and consider what investments make the most sense for your industry, region and country.



Some industries continue to rely heavily on **traditional channels** to reach their target audience and get their message across. While digital platforms can offer precise targeting and interactive capabilities, traditional media like television can provide broader reach or credibility with certain demographics. Understanding your audience and competitive set can help you decide what traditional channels are best suited to your business.



Marketers tend to invest in channels that they perceive to be effective, but that **perception doesn't always match reality**. Take radio, for example. While global marketers generally view it as less effective, **Nielsen Audio Brand Lift** studies found slightly higher levels of affinity lift and recommendation intent lift than other channels in the U.S.. Radio continues to prove its worth, especially in mid-to-lower-funnel use cases.



Nielsen's deduplicated cross-media measurement can help you find the right balance in your marketing plans. See how at the **end of the report**.

Section **3** **Seeing things clearly**

**Measuring Success**  
**in a changing world**



# Impressions are a must but not enough

Marketers in every region know that reach and frequency are **means to an end**.

Ultimately, marketers are accountable for sales, conversions and lowering the company's cost per acquisition—or, if they're looking into the distance, brand awareness, brand equity and customer lifetime value.

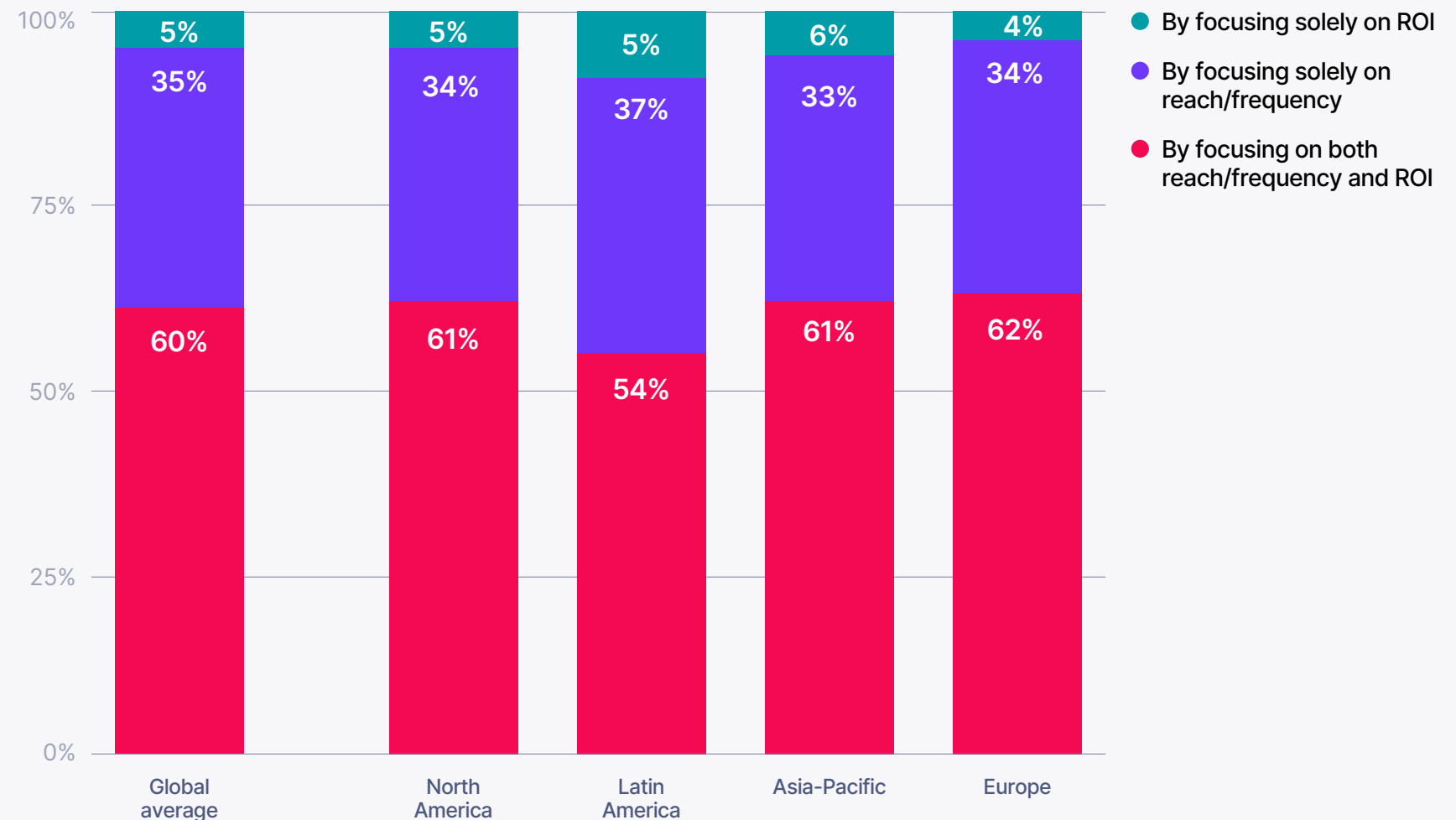
That's why 60% worldwide consider not just reach and frequency but also ROI when they analyze the performance of their campaigns. And there's remarkable agreement on this approach from region to region.

But that's easier said than done.

Figure 3.1

## How marketers approach cross-media measurement today

By region



Source: 2025 Nielsen Global Annual Marketing Survey

# Get the team onboard early

Marketers looking to calculate the ROI of their cross-media campaigns face a **laundry list of challenges**.

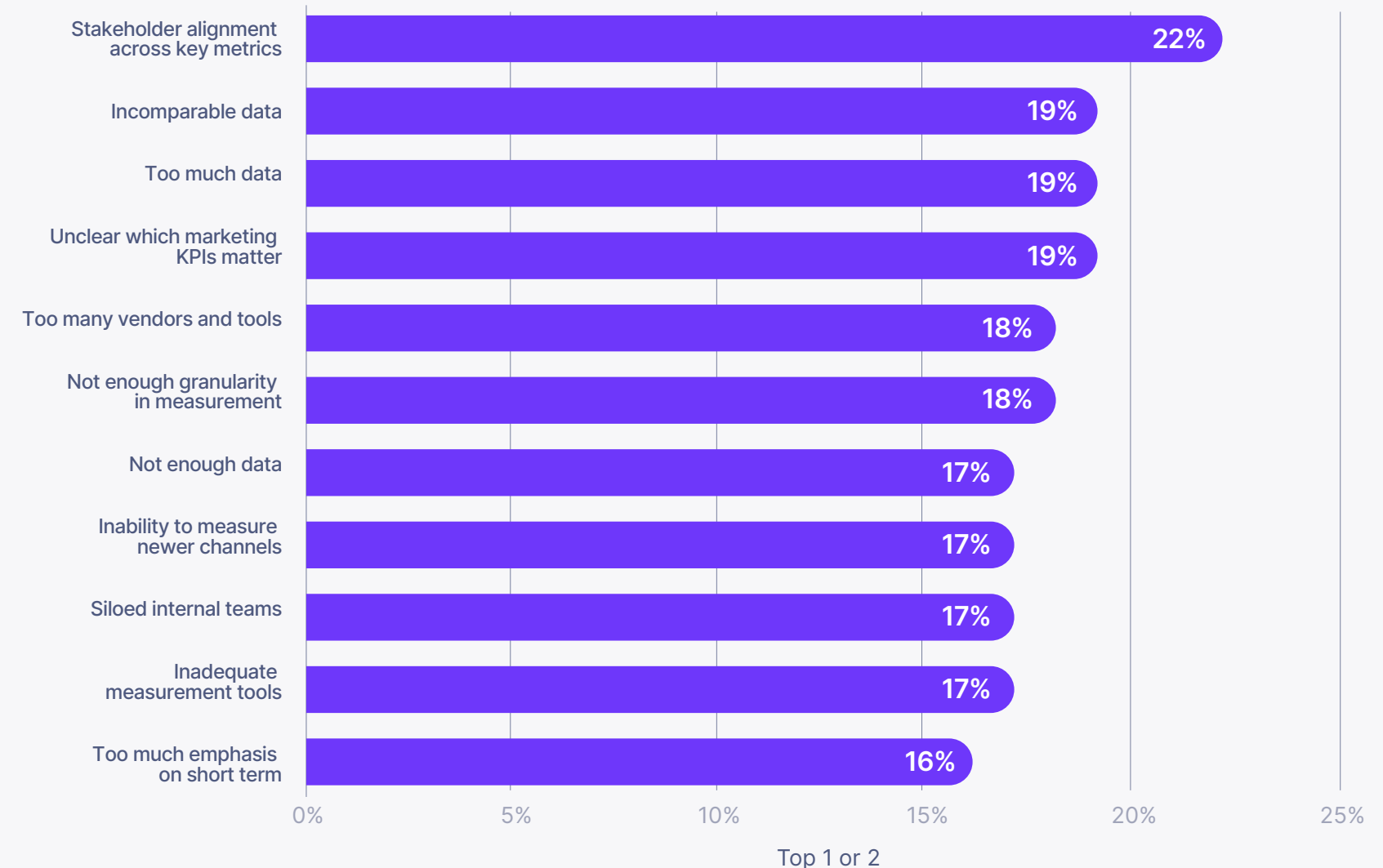
Some have to do with data: there's too much of it, too little, it's not granular enough, and it's often impossible to compare across channels. Others have to do with weak tools, too many vendors, unclear metrics, or lack of transparency from new channels. But the biggest challenge mentioned by our survey respondents is stakeholder alignment—or lack thereof, more precisely.

To be successful in today's challenging environment, marketers need to get everyone onboard from the very start and be very clear about the campaign's objectives, what the milestones will be, and how performance will be measured along the way. **No amount of data can make up for the dysfunction that comes with misaligned expectations and siloed internal teams.**

Figure 3.2

## Major challenges in measuring ROI of digital spending

Share of global marketers listing each as their first or second significant challenge



Source: 2025 Nielsen Global Annual Marketing Survey



# Marketers are struggling with holistic measurement

Unfortunately, only 32% of marketers globally say they **measure their media spending holistically** across both digital and traditional channels today. That’s considerably lower than last year, and even worse in Latin American and Europe where just 29% and 23% respectively are able to see the big picture.

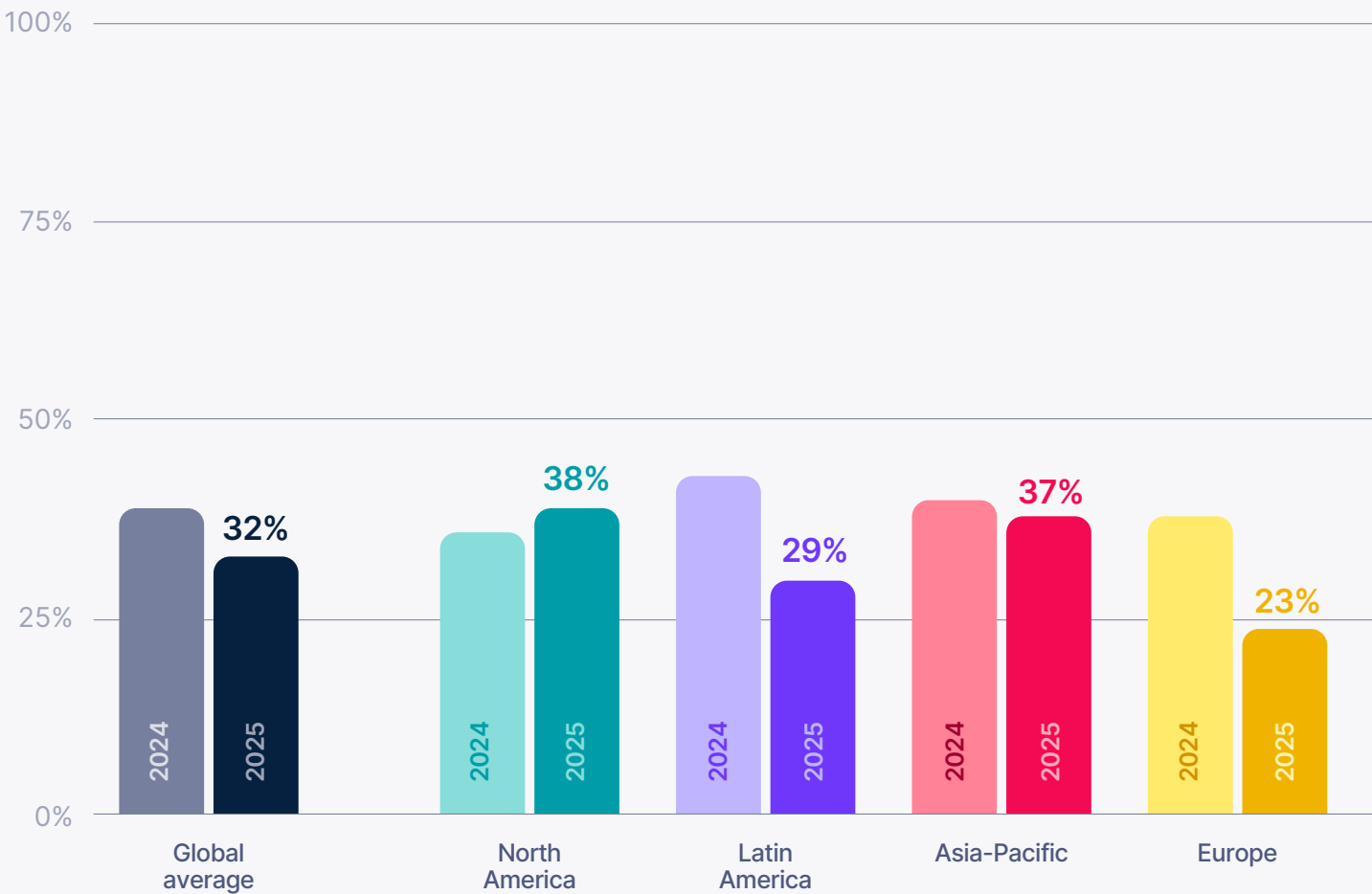
There are a number of reasons for this drop over the past 12 months: incompatible metrics from new channels; lack of transparency from walled gardens; the on-again, off-again deprecation of the third-party cookie;<sup>18</sup> and privacy regulations making it more difficult to secure consent from consumers and deduplicate their media exposures across channels.

We know from experience that digital and traditional channels lift each other up. Radio, for instance, has proved to be a great addition to digital media mixes.<sup>19</sup> Linear TV and CTV are another clear example. But those synergies can’t be realized if marketers are discouraged to even try.

<sup>18</sup> Digiday. [Google Chrome will now continue to use third-party cookies](#) (Apr 2025)  
<sup>19</sup> Nielsen. [Unlocking the potential of radio in marketing mix models](#) (Oct 2024)

Figure 3.3  
**Share of marketers measuring digital and traditional media spending holistically**

By region



Source: 2025 Nielsen Global Annual Marketing Survey; 2024 Nielsen Global Annual Marketing Survey

# RMNs are exciting new platforms but adding to the complexity

Take RMNs, for instance. As we saw in section 1, RMNs are capturing marketers' attention—and for good reasons. They offer closed-loop measurement (a direct link between exposure and conversion), but to abide by privacy regulations in the regions where they operate, they often require their advertising partners to use in-platform or custom attribution tools to make sense of their campaign measurement data. But **it's hard to trust a publisher that grades its own homework.**<sup>20</sup>

It may only be possible to take the data out of the platform in aggregate form, if at all, ruling out analysis across other channels in the advertiser's media mix—including other RMNs.<sup>21</sup>

While not used as frequently by marketers, third-party measurement solutions can provide marketers the opportunity to compare performance within these platforms relative to other channels.

<sup>20</sup> Digiday. [Retail media networks under scrutiny amid calls for transparency and accountability](#) (Oct 2024)

<sup>21</sup> Nielsen. [Need to Know: The value of independent measurement for retail media attribution](#) (Jan 2025)

Figure 3.4

## Methods used by marketers to attribute sales to RMN campaigns

By region



Source: 2025 Nielsen Global Annual Marketing Survey

# Amidst uncertainty, marketers are prioritizing accuracy

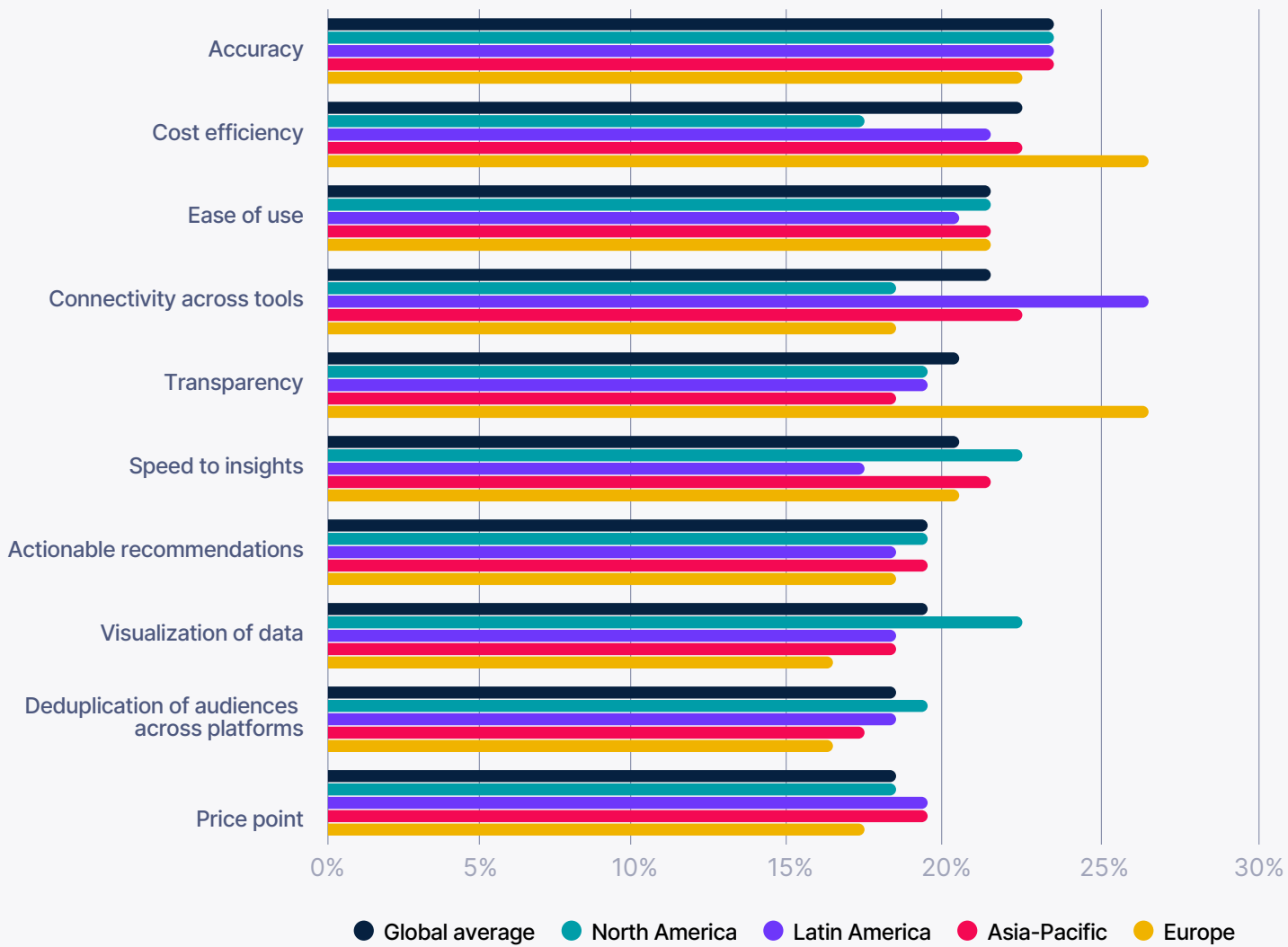
Accuracy, cost efficiency, ease of use and connectivity across tools are the most important attributes global marketers are looking for in marketing measurement technologies.

Accuracy, in particular, ranks highest in North America and Asia-Pacific. With marketers facing changes from AI and RMNs to economic and supply chain shifts, it's more important than ever for brands to know they have the right data.

For marketers in Latin America, connectivity across tools is a top priority along with accuracy. Both of these concerns speak to the fact that marketers are finding measurement tech complicated to use today.

The one outlier is Europe. As we saw in section 2, this region has been facing headwinds and is focused on revenue growth. So it's not surprising to see European marketers prioritizing cost efficiency. But equally important is transparency. While these marketers may be willing to sacrifice some accuracy for reduced costs, they want a clear understanding of any limitations in their measurement.

Figure 3.5  
**Priorities for marketing measurement technologies**  
 Share of marketers listing each technology attributes as their first or second priority



Source: 2025 Nielsen Global Annual Marketing Survey

# Key takeaways



Successful marketers know they need accurate **reach and frequency** metrics to measure their cross-media campaigns, as well as **ROI** to prove their worth. Despite this, many marketers seem to be **struggling** to bring digital and traditional channels into a holistic measurement framework. Deduplicated cross-media data can help you understand your performance across digital and traditional channels and optimize holistically.



Running a campaign these days can be an obstacle course, and the most important hurdle to overcome is **stakeholder alignment**. Get buy-in on plans and strategies early to ensure your campaigns don't get tied up due to miscommunication.



RMNs are drawing a lot of attention but compounding marketers' challenges by making measurement **less transparent**. Make sure you're exploring independent third-party measurement solutions so you have data you can trust that's comparable across channels. With Nielsen's new **Ad Intel** retail media coverage, you can discover how advertisers and media agencies are planning and managing digital campaigns on retail media, specifically the Amazon e-commerce platform.<sup>22</sup>



In uncertain times, marketers are **prioritizing accuracy** when it comes to their data and technology. While cost efficiencies can help you meet targets in the short term, the right data will ensure long-term measurable success that can help you prove the value of your plans and tactics.



**Nielsen's outcomes measurement can help you understand the key drivers of campaign performance and measure success. See how on the [next page](#).**

<sup>22</sup> Coverage varies by market.

# How Nielsen can help

Nielsen can help you address some of this year's biggest trends and challenges. Our end-to-end offerings can support you throughout your campaigns.



## *Stay ahead of the competition with media spend ad intelligence*

Nielsen provides comprehensive cross-platform **advertising intelligence** with actionable insights to help marketers track competitor ad spend (including the channels they invest in and creatives), analyze brand strategies and learn from past advertising campaigns to plan for the next.

Nielsen can provide competitive global advertising data for your needs. Our platform enables you to monitor ad activity across TV, CTV, audio, digital (including search and social), retail media, print, out of home and cinema.<sup>23</sup>

## *Determine the optimal media mix with cross-media planning*

Nielsen's suite of **planning solutions** provide a common language across local, national and international borders so you can find your key audiences—beyond age and gender—and confidently reach and engage them where they consume media.

Nielsen has the tools to help you create a truly effective media strategy by making reaching your **audiences** easier and more efficient than ever. Leveraging first- and third-party audiences, you can build smarter media plans across channels and reduce media waste.

## *Optimize cross-media campaigns in flight with deduplicated ad measurement*

Audiences are everywhere—linear, streaming and digital. Gaining true insight into consumer behavior requires a comprehensive, deduplicated data set capturing who views what ad on which devices. Nielsen's **measurement solutions** provide unmatched understanding of your campaigns, empowering strategic decisions and driving bottom line growth.

With Nielsen you can optimize cross-media campaigns in-flight by understanding unique, deduplicated reach both within and across platforms.

## *Understand the impact of your advertising with outcomes measurement*

Building your brand drives direct sales impact and improves the efficacy of your activation efforts. Gain actionable insights and measurement across the full marketing funnel with Nielsen's **outcomes solutions**. Understand drivers of campaign performance and measure success.

From brand marketing to point of sale, Nielsen's measurement can ensure that you don't leave out any part of the funnel.

<sup>23</sup> Coverage varies by market.



# Conclusion

The only way to face uncertainty is with data, insights and the right tools to turn insights into winning strategies.

While 2025 is shaking up the status quo for businesses around the world, marketers know better than most how to adapt to changing conditions. Already, they're developing new touchpoints with their audiences up and down the funnel by adding RMNs and CTV to their campaigns, unlocking new synergies with more nuanced digital-traditional media mixes, and taking AI for a spin to streamline their operations.

But to validate their decisions and truly align their media buys with their campaign objectives, they need to trust that their measurement solutions can keep up with the complexities of modern cross-media advertising. Those are our marching orders at Nielsen, and we're looking forward to supporting your growth now and into the future. [Please reach out](#) and let us know how we can help.





# About this report

This is the seventh annual marketing report Nielsen has produced. It's also the fourth to be global. The report leverages survey responses of marketers across a variety of industries whose focus pertains to media, technology and measurement strategies. For this report, we engaged 1,400 global marketing professionals who completed an online survey between Feb. 25, 2025, and March 6, 2025.

In terms of seniority level, we engaged global brand marketers at or above the manager level. They all work with annual marketing budgets of at least USD\$1 million, and two out of three with budgets over USD\$10 million.

Here are the corresponding sample distributions by region. Please keep these sample sizes in mind when reading and interpreting the charts in this report.

**Respondents by region:**

**APAC:** 350 respondents

**EMEA:** 350 respondents

**North America:** 350 respondents

**Latin America:** 350 respondents

**TOTAL:** 1,400



# About Nielsen

Nielsen is a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their global audiences—now and into the future.

Learn more at [www.nielsen.com](https://www.nielsen.com) and connect with us on social media ([X](#), [LinkedIn](#), [YouTube](#), [Facebook](#) and [Instagram](#))