

2025 Media Retrospective: Lessons in Value, Accountability, and Acceleration

2025 marked a decisive shift in how brands, agencies, and audiences interact. The year witnessed the consolidation of AI in marketing workflows, the expansion of retail media into full-funnel ecosystems, and the redefinition of discovery through zero-click search. Yet behind the hype, deeper questions emerged — about value, transparency, and control. For advertisers, it was a year of recalibration: fewer clicks, more context; less linear media, more intelligent automation; and a growing need to audit not just spend, but systems.

1. The Consumer POV: From Viewing to Doing

Short-form Video Becomes the Default Format

By mid-2025, vertical short-form video (TikTok, Reels, Shorts) dominated consumer attention — and brand budgets. These formats, once seen as supplementary, became central to media strategy.

Creative production shifted toward micro-storytelling and algorithmic adaptability, with AI now editing, captioning, and even generating short-form creative at scale. The outcome: faster, cheaper, but riskier creative pipelines, with authenticity and transparency under constant scrutiny.

Ethical and Sustainable Consumption

Consumers increasingly demanded that media itself reflect ethical values. The carbon impact of digital advertising entered mainstream conversation, prompting platforms and agencies to report on “green GRPs” — emissions per thousand impressions. Brands embracing responsible media supply chains (verified publishers, reduced ad waste, diverse creators) saw measurable gains in trust and performance. Sustainability slowly evolved from CSR talking point to core media metric.

While 2025 saw a slight retreat in public discourse around sustainability — partly due to political pushback, “green fatigue,” and fears of overclaiming — most major advertisers quietly continued to embed sustainable practices within their operations. Rather than headline campaigns, sustainability became – for many - an operational standard: cleaner programmatic supply paths, diverse and inclusive creator partnerships, and transparent carbon reporting integrated into campaign planning. The result is a more mature phase of ethical media — less about public declarations, more about practical delivery. Sustainability and responsibility are no longer side initiatives or CSR slogans; they are core performance metrics, shaping long-term trust, brand resilience, and investor confidence.

2. Technology & Internal Transformation

Generative AI Becomes Central

2025 was the year AI truly embedded itself in marketing operations. According to Mediaocean's 2025 State of the Industry Report, 63% of marketers identified generative AI as "critical" to their strategy. AI now fuels dynamic creative optimisation, contextual targeting, and campaign automation across social, digital, and Connected TV.

While the adoption curve was steep, the integration challenge remained — particularly around value attribution and auditability. Many organisations discovered that automation without governance multiplies complexity.

CTV and the Streaming Shift

Connected TV continued its exponential rise. Programmatic CTV spend surpassed linear television for the first time, driven by ad-supported streaming, shoppable ads, and live sports.

CTV is now a full-funnel performance channel, not just awareness. However, measurement fragmentation remains a barrier, pushing brands to demand clearer data-sharing frameworks and independent verification.

Privacy and Context Take the Lead

With third-party cookies effectively obsolete, 2025 became the year of privacy-positive precision.

Brands invested heavily in first-party data, contextual signals, and AI-driven segmentation. Contextual advertising re-emerged — now powered by semantic AI rather than keyword matching.

As compliance tightened globally, marketers reoriented toward transparency-first strategies, where data ethics equalled brand safety.

3. Zero-Click Search: Discovery Without Destination

In 2025, search changed forever.

AI-driven engines like Gemini and ChatGPT Search often replaced traditional query-result paradigms with conversational, direct answers. Users no longer "clicked through"; they "conversed."

The impact was profound: publishers saw organic traffic decline, paid search effectiveness dropped, and content discoverability hinged on structured metadata, brand authority, and verified source inclusion.

Brands that optimised early for AI retrieval — integrating structured data and ensuring verifiable trust signals — retained visibility. Those that didn't found themselves invisible in the "answer economy."

Discovery is now dialogue — and attention, once measured in impressions, is measured in interaction depth.

4. The Players: Redrawing the Media Map

Creator Economy Surpasses Traditional Media

For the first time, creator-generated content out-earned professional media in total ad revenue. Creators now command not only audience share but also budget share, as brands turn to influencer-driven commerce, co-creation, and community storytelling.

With scale comes scrutiny: influencer compliance, disclosure, and authenticity have become critical areas for contract review.

The Return of Pull Marketing: Earning Attention Through Value

As audiences grow more selective and advertising saturation reaches new heights, brands are rediscovering the power of pull marketing — strategies that attract consumers through relevance, trust, and genuine value rather than interruption. This is further accelerated by the cookieless future and re-introduction of contextual targeting - Driven by content quality, authenticity, and data-informed storytelling, pull marketing shifts the focus from buying reach to earning engagement. It integrates seamlessly across influencer collaborations, branded content, social communities, and owned media ecosystems — encouraging discovery rather than demanding attention.

In 2025, as privacy regulations tighten and third-party targeting declines, pull marketing has become both a creative and compliance imperative. Brands that build loyalty through utility, experience, and authenticity are achieving deeper, longer-lasting relationships — not just impressions.

Retail Media Networks: The New Power Channel

Retail Media Networks (RMNs) surged in 2025, evolving from point-of-sale advertising to omnichannel ecosystems integrating social, programmatic, and CTV.

Powered by first-party shopper data and closed-loop attribution, retail media became the most measurable — and accountable — channel in the mix.

For advertisers, it represented both opportunity and complexity: new forms of inventory media, partnerships, and contract structures requiring precise governance.

DOOH Accelerates

Digital Out-of-Home (DOOH) reached a milestone, with programmatic spend exceeding \$1B globally.

Dynamic, data-driven outdoor media now integrates real-time triggers (weather, location, sentiment) — bridging physical and digital attention spaces.

It's a renaissance for public media, but one that raises fresh compliance challenges around audience measurement and data privacy in physical spaces.

5. Holding Companies: Consolidation, Crisis, and AI Bets

2025 a year of extremes in the holding company landscape.

- Publicis Groupe emerged as the relative winner, buoyed by its €12B long-term investment in data and AI.
- Omnicom and IPG endured a “wait-and-see” year as they are closing in on their merger.
- Dentsu announced plans to divest its international operations — a seismic restructuring moment and a major change of strategy.
- WPP saw an 80% drop from its share value from 10 years ago, rattling confidence across the sector.

Every major holding company declared significant AI investment — with WPP citing £300M in new tech spend — but few could yet demonstrate measurable value proposition and ROI.

6. Compliance: From Audit to Intelligence

Behind the transformation lies a growing compliance gap.

As new media channels proliferate, so do audit demands — from influencer payments to AI-generated creative licensing. The rise of inventory-based buying and AI-powered systems introduces unseen risks around transparency, data use, and value verification.

Key Compliance Focus Areas for 2025–26

- Inventory Media Control: Managing inventory media usage and verifying value delivery.
- Creative & Production Audits: Scaling by higher volume, task demands, and the integration of generative AI tasks.
- AI Value Exchange: Understanding where automation delivers true savings — and where it obscures accountability.
- Influencer Audits: Evaluating the ecosystem, optimizing contract structures, reviewing finances, tracking KPIs, and measuring ROI.

- *Retail media: Media Contract compliance Audit will have a major focus on inventory media and any financial activities and issues in retail media*
- *Brand safety: Auditing processes and compliance ensuring brand exposure.*

The compliance sector is itself experiencing a period of significant disruption. Mergers, acquisitions, divestitures, and internal reorganisations are reshaping provider offerings, often consolidating performance and contract compliance services. While these structural changes can improve operational efficiency, they may also introduce confidentiality risks and drive audits toward a more generalist approach.

Such broad frameworks, however, are increasingly insufficient for organisations seeking deep, specialised oversight.

3A Compliance addresses this gap with senior, targeted, rigorous auditing methodologies. By combining sector expertise with detailed, bespoke assessments, 3A Compliance ensures comprehensive oversight, mitigates hidden risks, and delivers actionable insights beyond standard audit procedures.

What 3A Compliance Can Help You Do

Audit: Provide clarity in complex ecosystems, with a focus on inventory media and influencer networks, led by senior partners.

Analysis: Transform audit data into actionable insights, including emerging areas like AI investments, evaluating true value exchange, influencer performance, and inventory media impact.

Assessment: Accelerate influencer engagement, brand protection, contract review, risk mitigation, compliance training, and sustainable governance.

Summary: The Year Attention Reset Itself

2025 was the year media, advertising, and compliance converged — but not yet harmonised. AI elevated capability, retail media expanded opportunity, and zero-click discovery redefined visibility. For brands and agencies, the challenge ahead is not to only automate faster — but to govern smarter.

The media reset has begun; the next advantage will belong to those who can prove and verify, not just promise, value.

3A Compliance turns contract compliance into competitive advantage — delivering actionable audits, proven ROI, and clarity that strengthens agency partnerships and business performance.

For further information or guidance, please reach out to our team at your convenience.