2025 H2

Automotive Market Report

Key insights on consumer, advertising, and media trends, with data gathered from leading marketing industry professionals.

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Introduction

Thank you for reading Mediaocean's 2025 H2 Automotive Market Report. These insights reflect input from marketing professionals, focused on key consumer and technology trends along with projected media investments.

We primarily surveyed marketers and agencies, but also included perspectives from media companies, measurement firms, tech platforms, and other industry cohorts. This is the fourth in our series of bi-annual vertical market reports reflecting over 300 automotive respondents, with the first published in January 2024. The most recent data points used in this research are based on surveys conducted in May 2025.

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Ad spend shifts signal more focused H2

Automotive marketers are approaching the second half of 2025 with a more focused lens—balancing caution with continued investment in performance-driven channels. While some budget tightening is clearly underway, most respondents still plan to either maintain or grow spend across the majority of media types.

CTV stands out as the top priority for the category, with 67% of automotive marketers planning to increase spend—a 31% jump over the first half of the year. This growth reinforces the channel's role in connecting premium reach with precision targeting, particularly as linear audiences fragment and full-funnel impact becomes more measurable.

Search also saw solid momentum, with 64% planning to increase investment—though the pace of growth has slowed compared to earlier in the year. Meanwhile, Digital Display/Video and Social Platforms saw equal shares of increase (50%), but both declined by more than 25% compared to H1, indicating a potential shift in how automotive brands are approaching reach and personalization at scale.

Radio/Audio saw a 45% increase in planned investment—underscoring its renewed value in driving regional activations and lower-funnel engagement. At the same time, Retail Media surged by 64%—the highest percentage change across any channel—highlighting its rapid ascent as a performance driver for marketers seeking measurable, commerce-linked outcomes.
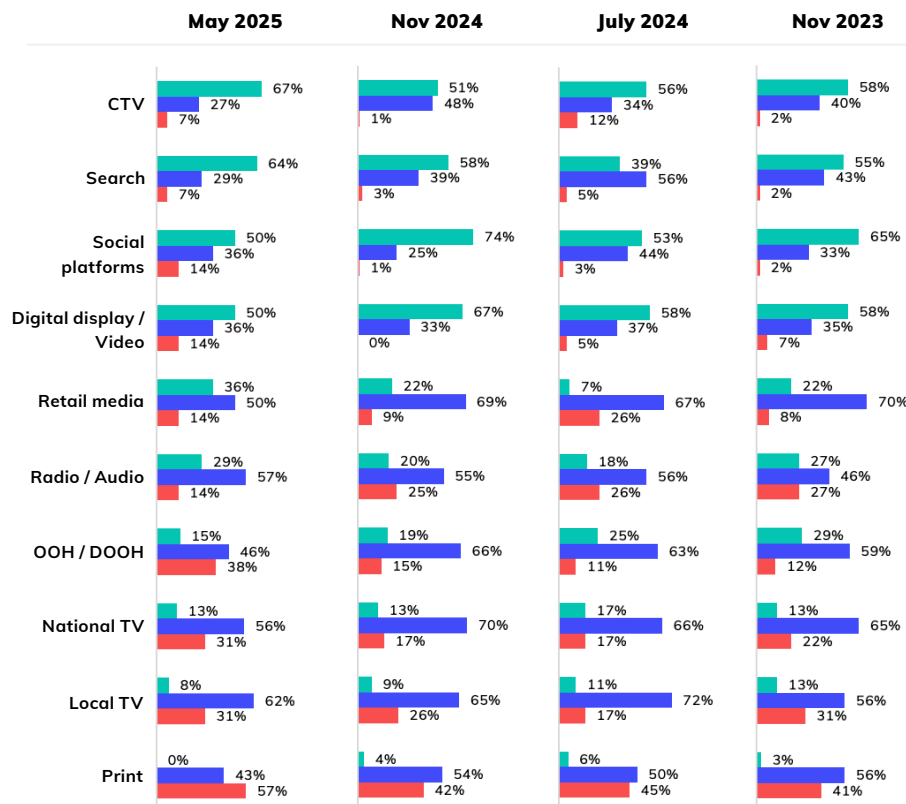
However, not all channels fared as well. Print, OOH/DOOH, and Local TV saw notable drops in planned increases, and now each carry higher shares of marketers planning to decrease investment. National TV held steady, but with no net gain in spend outlook, signaling a continued reevaluation of upper-funnel reach strategies in a fragmented media ecosystem.

Taken together, these shifts suggest that while automotive marketers are not retreating, they are reallocating. The second half of the year will likely be defined by prioritization—doubling down on channels that deliver measurable outcomes while reducing exposure to those with less demonstrable value.

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For each media channel below, do you expect to increase, decrease, or maintain your spend over the next half-year?

Legend: ● Increase ● Maintain ● Decrease

Channel	May 2025			Nov 2024			July 2024			Nov 2023		
	Inc	Main	Dec	Inc	Main	Dec	Inc	Main	Dec	Inc	Main	Dec
CTV	67%	27%	7%	51%	48%	1%	56%	34%	12%	58%	40%	2%
Search	64%	29%	7%	58%	39%	3%	39%	56%	5%	55%	43%	2%
Social platforms	50%	36%	14%	74%	25%	1%	53%	44%	3%	65%	33%	2%
Digital display / Video	50%	36%	14%	67%	33%	0%	58%	37%	5%	58%	35%	7%
Retail media	36%	50%	14%	22%	69%	9%	7%	67%	26%	22%	70%	8%
Radio / Audio	29%	57%	14%	20%	55%	25%	18%	56%	26%	27%	46%	27%
OOH / DOOH	15%	46%	38%	19%	66%	15%	25%	63%	11%	29%	59%	12%
National TV	13%	56%	31%	13%	70%	17%	17%	66%	17%	13%	65%	22%
Local TV	8%	62%	31%	9%	65%	26%	11%	72%	17%	13%	56%	31%
Print	0%	43%	57%	4%	54%	42%	6%	50%	45%	3%	56%	41%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Four surveys of 337 total automotive marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

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Strategic priorities: Demand Gen and Privacy

While Performance-Driven Paid Media, Brand Advertising, and Measurement & Attribution remain the most critical capabilities for automotive marketers, two areas saw notable gains in importance: Demand Generation and First-Party Data Mastery.

Demand Generation increased 63% since the last wave of research. As high-consideration purchases like vehicles require longer purchase cycles, automotive brands are doubling down on efforts to build awareness, nurture leads, and convert intent over time.
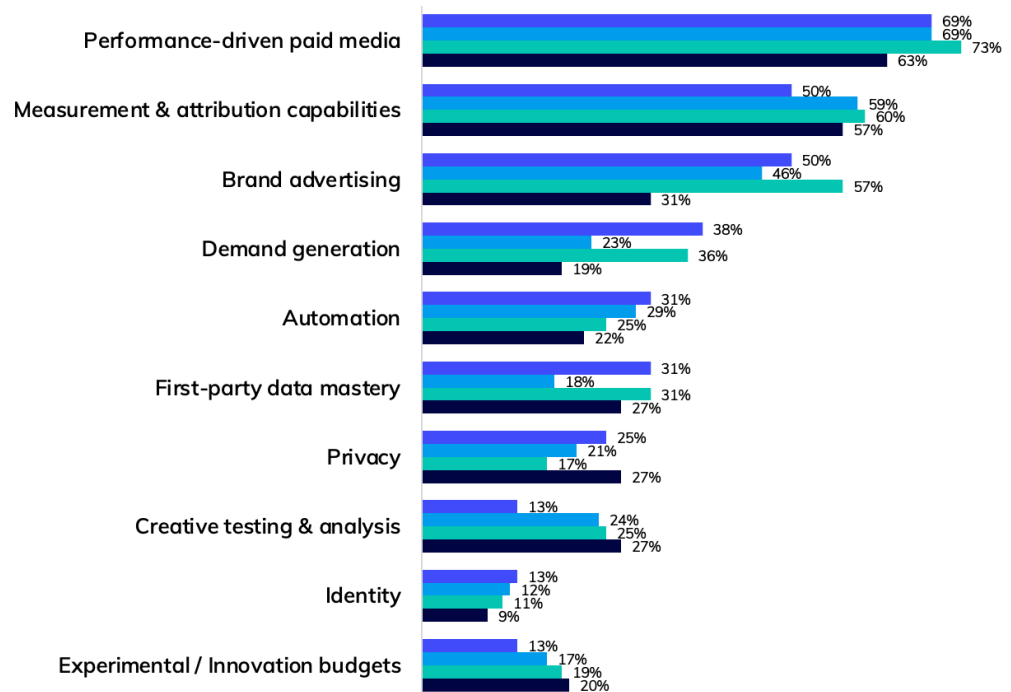
First-Party Data Mastery also surged (+74%), reinforcing the critical need for automotive brands to own the customer relationship across increasingly complex and fragmented digital journeys. With third-party signals diminishing, automakers are investing more in CRM systems, loyalty programs, and data infrastructure to fuel smarter media and creative strategies.

Privacy rose by 19%, signaling renewed attention to consumer trust and regulatory readiness. As data regulations tighten and some global enforcements becomes more aggressive, automotive marketers are investing in infrastructure that ensures privacy compliance—without compromising personalization or performance. This trend reflects a shift from treating privacy as a cost center to seeing it as a strategic advantage in building brand equity and audience loyalty.

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Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?

● May 2025   ● November 2024   ● July 2024   ● November 2023

Capability	May 2025	November 2024	July 2024	November 2023
Performance-driven paid media	69%	69%	73%	63%
Measurement & attribution capabilities	50%	59%	60%	57%
Brand advertising	50%	46%	57%	31%
Demand generation	38%	23%	36%	19%
Automation	31%	29%	25%	22%
First-party data mastery	31%	18%	31%	27%
Privacy	25%	21%	17%	27%
Creative testing & analysis	13%	24%	25%	27%
Identity	13%	12%	11%	9%
Experimental / Innovation budgets	13%	17%	19%	20%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Four surveys of 337 total automotive marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

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While Measurement & Attribution Capabilities declined by 15%, this shift may signal a positive evolution—way from siloed legacy tools and toward more integrated, insight-driven workflows. Rather than treating measurement as a standalone task, automotive marketers are embedding it directly into creative and media execution, enabling smarter, more connected decisions across the campaign lifecycle.

At the same time, Creative Testing & Analysis dropped by nearly 48%, signaling a shift away from isolated testing toward real-time optimization. Dynamic Creative Optimization (DCO) is gaining traction across the automotive space, enabling brands to personalize messaging and adapt creative based on performance signals in-flight. By pairing DCO with AI, marketers can now understand what's working—and why—without relying solely on post-campaign learnings. This shift is breaking down traditional silos between creative and performance, creating a more agile, audience-led approach to storytelling.

Other areas such as Automation and Experimental/Innovation Budgets held relatively steady, indicating cautious progress rather than major shifts.

As the automotive industry adapts to ongoing economic pressures and evolving consumer expectations, marketers are rebalancing their focus—building durable pipelines, strengthening data ownership, and aligning with privacy standards to drive performance in a rapidly changing environment.

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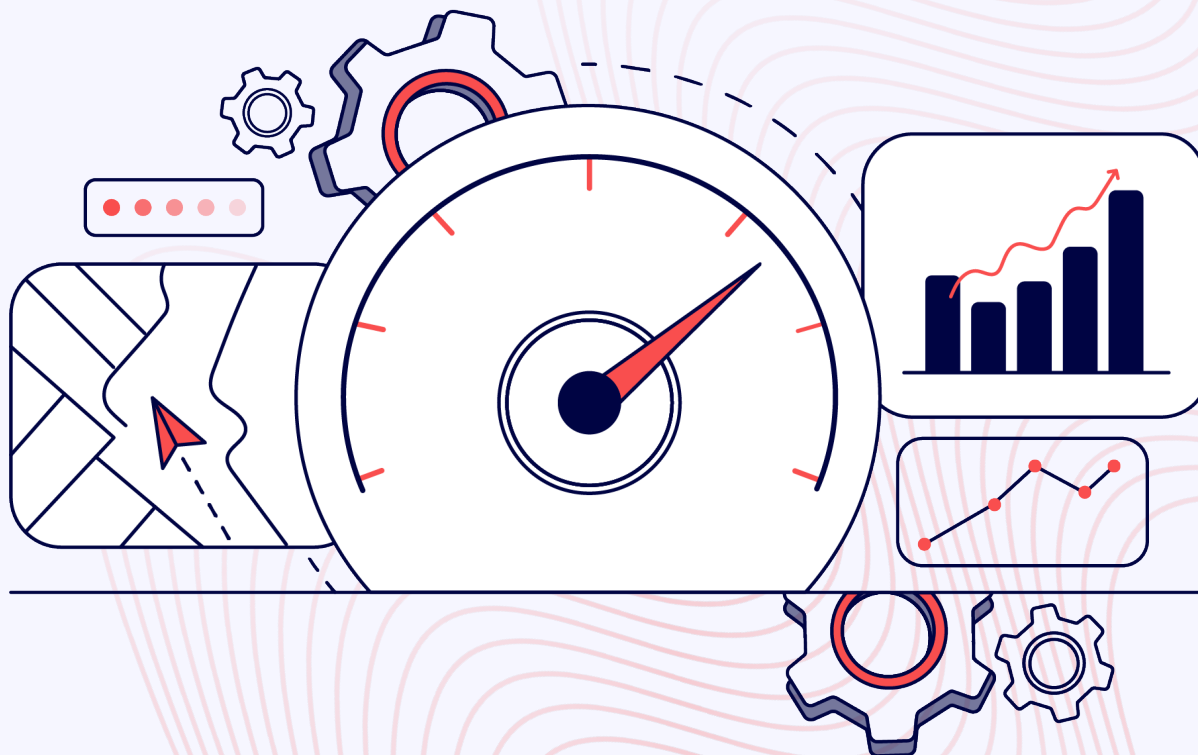
Automotive marketers double down on Gen AI

In the automotive industry, Generative AI has taken a commanding lead as the top consumer trend to watch, selected by 82% of marketers in our latest survey—a 28% increase from the previous wave and the largest gain across all options. This surge reflects not just interest in AI as a tool, but recognition of its power to transform consumer expectations, media engagement, and the end-to-end car-buying journey.

Recent advancements in large language models and multimodal AI—from GPT-4.5 to Sora and Runway Gen-3—are reshaping how automotive brands approach content, customer interaction, and storytelling. From AI-powered vehicle configurators to personalized ad creative and predictive lead scoring, marketers are embracing Gen AI to streamline workflows and deepen personalization at scale.
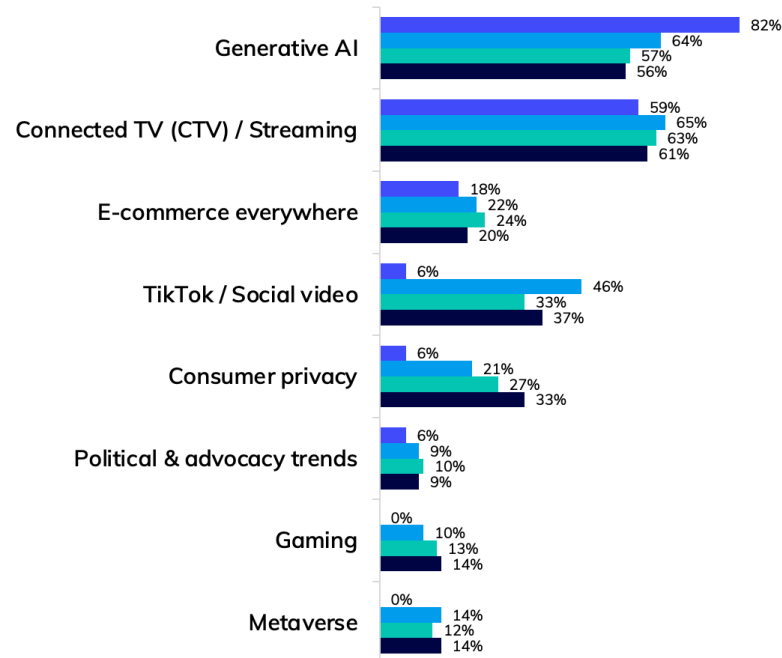
Connected TV (CTV)/Streaming remains a core trend for 59% of automotive marketers. While slightly down from previous waves, CTV continues to serve as a vital bridge between traditional linear storytelling and digital performance. Automotive brands are leaning into the format to reach engaged viewers in high-impact environments, often pairing it with dynamic and/or interactive creative and cross-device strategies to maximize effectiveness.

In contrast, several once-prominent trends saw sharp pullbacks. Consumer Privacy dropped by 71%—likely reflecting a strategic pivot toward proactive identity and data ownership solutions rather than reactive compliance initiatives. Interest in Gaming and the Metaverse also fell off significantly, signaling a more pragmatic approach to trend adoption among marketers.

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What are the most important consumer trends you're watching for in H2 2025?

● May 2025 ● November 2024 ● July 2024 ● November 2023

Generative AI
- 82%
- 64%
- 57%
- 56%

Connected TV (CTV) / Streaming
- 59%
- 65%
- 63%
- 61%

E-commerce everywhere
- 18%
- 22%
- 24%
- 20%

TikTok / Social video
- 6%
- 46%
- 33%
- 37%

Consumer privacy
- 6%
- 21%
- 27%
- 33%

Political & advocacy trends
- 6%
- 9%
- 10%
- 9%

Gaming
- 0%
- 10%
- 13%
- 14%

Metaverse
- 0%
- 14%
- 12%
- 14%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Four surveys of 337 total automotive marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

Meanwhile, Political & Advocacy Trends fell to just 6%, despite a highly charged global environment. This may suggest that automotive marketers are staying focused on controllable factors like innovation and performance, rather than navigating riskier social and political terrain in their messaging.

In total, the data points to a clear recalibration: automotive marketers are centering their strategies around transformative technologies like Gen AI, while continuing to prioritize proven channels like CTV and deprioritizing trends with limited relevance to the path to purchase. As the second half of 2025 unfolds, those who embrace AI-powered agility and smarter consumer engagement are best positioned to drive relevance and results.

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AI moves from experimentation to execution

Marketers in the automotive sector are rapidly shifting their use of Generative AI, moving beyond early stage testing into more strategic and operational applications. While use cases vary, one clear theme has emerged: AI is becoming a core enabler of speed, efficiency, and smarter decision-making across teams.

Customer Service saw the most dramatic shift in this wave, skyrocketing from 16% to 50%—a 213% increase. As vehicle buyers demand faster, more personalized support across digital and dealer touchpoints, AI is being deployed to power intelligent chatbots, automate routine inquiries, and scale human-led assistance with context-aware interactions.

Market Research rose to 42%, as AI tools increasingly support competitive monitoring, voice-of-customer analysis, and trend synthesis. Automotive marketers are using Gen AI to cut through the noise and extract meaningful insights from reviews, social chatter, and campaign data to guide everything from positioning to product innovation.
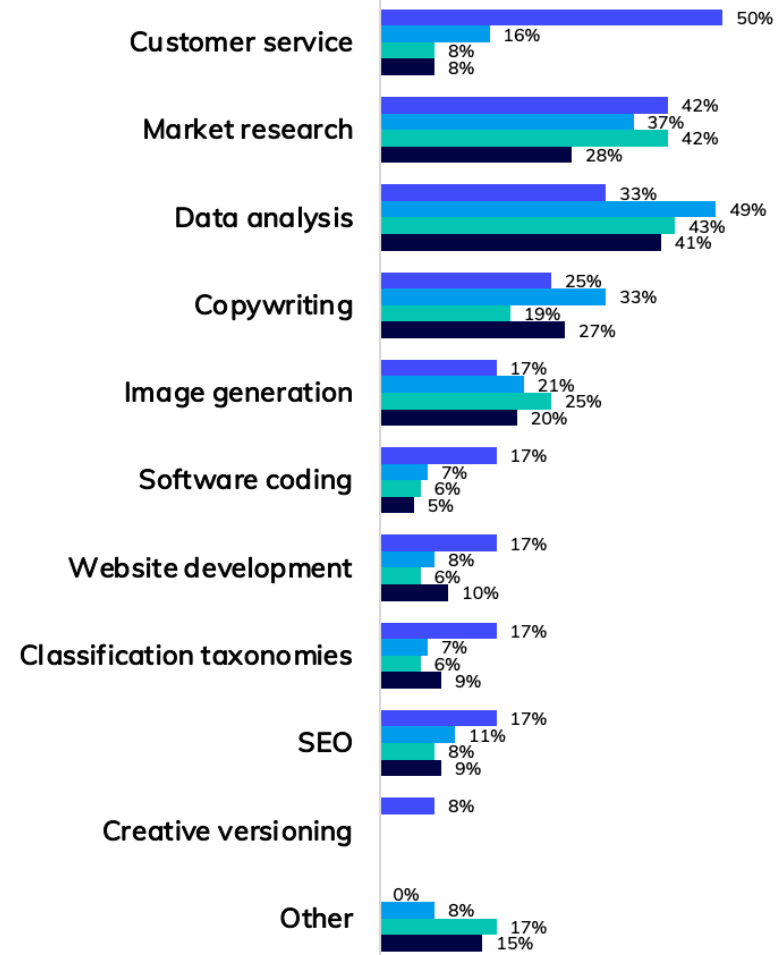
While still a top use case, Data Analysis dropped to 33%—a 33% decrease—likely reflecting saturation as it becomes table stakes rather than a differentiator. Similarly, Copywriting declined to 25%, though it remains a vital tool for generating ad variations, product descriptions, and website content at scale.

Interestingly, more technical and production-focused applications gained momentum. Classification Taxonomies, Software Coding, and Website Development each more than doubled in adoption—underscoring Gen AI's expanding role in backend infrastructure, digital experience creation, and content tagging for improved automation and personalization.

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How are you using Generative AI in your marketing?

● May 2025　● November 2024　● July 2024　● November 2023

| Category	May 2025	November 2024	July 2024	November 2023
Customer service	50%	16%	8%	8%
Market research	42%	37%	42%	28%
Data analysis	33%	49%	43%	41%
Copywriting	25%	33%	19%	27%
Image generation	17%	21%	25%	20%
Software coding	17%	7%	6%	5%
Website development	17%	8%	6%	10%
Classification taxonomies	17%	7%	6%	9%
SEO	17%	11%	8%	9%
Creative versioning	8%			
Other	0%	8%	17%	15%

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New to this wave, Creative Versioning debuted at 8%, suggesting early traction in using AI to scale asset adaptations by format, audience, and channel—especially valuable for omnichannel campaigns with high localization needs.

When asked about expected impact over the next 12 months, 50% of automotive marketers anticipate Gradual Change in both media planning and creative optimization. Notably, 25% expect Major Disruption in creative—reflecting AI's stronger foothold in content generation workflows versus more entrenched media buying systems.

Bottom line: Gen AI is no longer a fringe experiment for automotive brands. From streamlining service to scaling creative to accelerating research, AI is becoming a foundational tool for delivering faster, smarter, and more relevant experiences across the entire vehicle consideration and purchase journey.

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What impact do you believe AI will have on creative optimization in the next 12 months?

- Minimal impact 25%
- Major disruption 25%
- Gradual change 50%
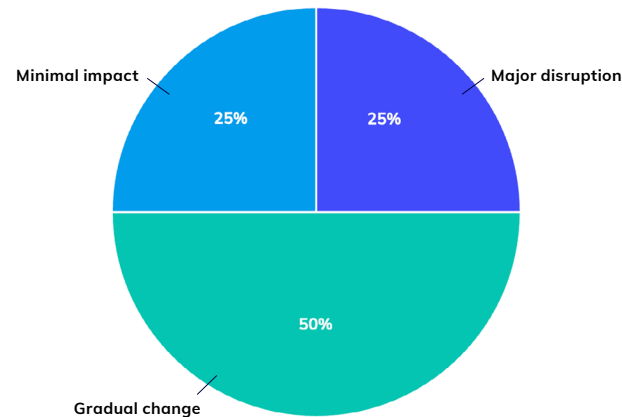
What impact do you believe AI will have on media planning and buying in the next 12 months?
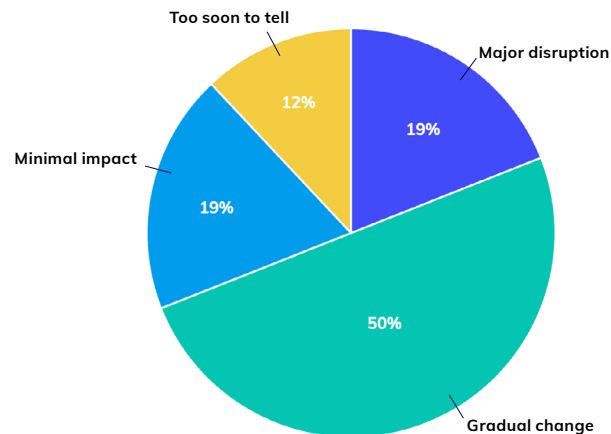
- Too soon to tell 12%
- Major disruption 19%
- Minimal impact 19%
- Gradual change 50%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Survey of 52 total automotive marketing professionals conducted through SurveyMonkey in May 2025

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CTV advances with personalization and performance

As CTV cements its role in the automotive media mix, marketers are doubling down on the channel's ability to deliver both upper- and lower-funnel impact. But with that confidence comes greater expectations— for tailored messaging, measurable results, and smarter campaign orchestration.
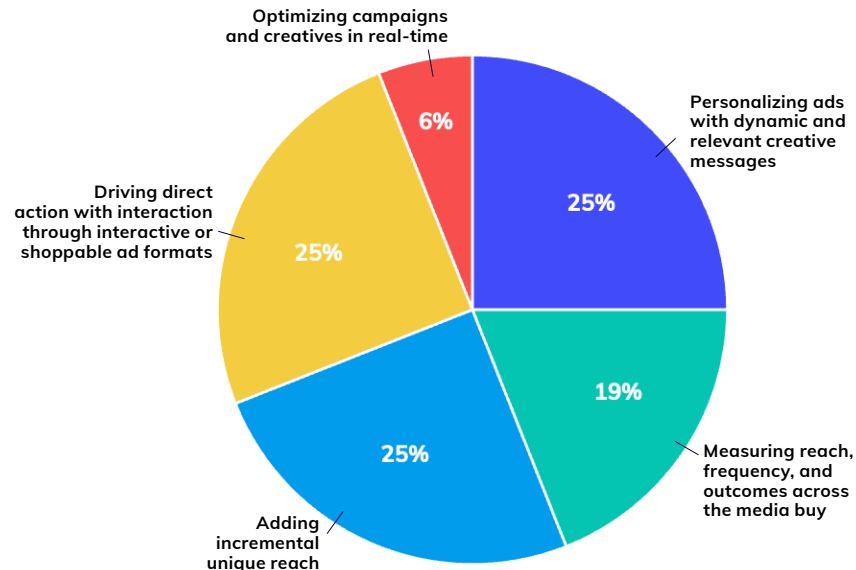
When asked which aspect of CTV is most important for driving full-funnel performance, automotive marketers were evenly split across three top priorities: Adding Incremental Unique Reach (25%), Driving Direct Action with Interactive or Shoppable Ad Formats (25%), and Personalizing Ads with Dynamic and Relevant Creative Messages (25%). This balance reflects a maturing view of CTV, not just as a reach driver, but as a dynamic platform for personalized, interactive storytelling and performance outcomes.

While Impressions (50%) remain the most common metric, Conversions (44%)—the clearest indicator of outcomes—and Reach (44%) are close behind, signaling demand for both scale and impact. Completion Rates (38%) and Frequency (38%) also ranked highly, underscoring the need for campaigns that not only reach viewers, but reach them the right amount of times to be fully engaged.

Despite growing investment and expectations, operational challenges continue to slow progress. Limited Cross-Channel Visibility was cited by 69% of respondents, followed by Data Silos Across Platforms (56%), and a Lack of Unified Measurement (50%).

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What aspect of CTV is most important to drive full-funnel performance?

- Optimizing campaigns and creatives in real-time — 6%
- Personalizing ads with dynamic and relevant creative messages — 25%
- Measuring reach, frequency, and outcomes across the media buy — 19%
- Adding incremental unique reach — 25%
- Driving direct action with interaction through interactive or shoppable ad formats — 25%
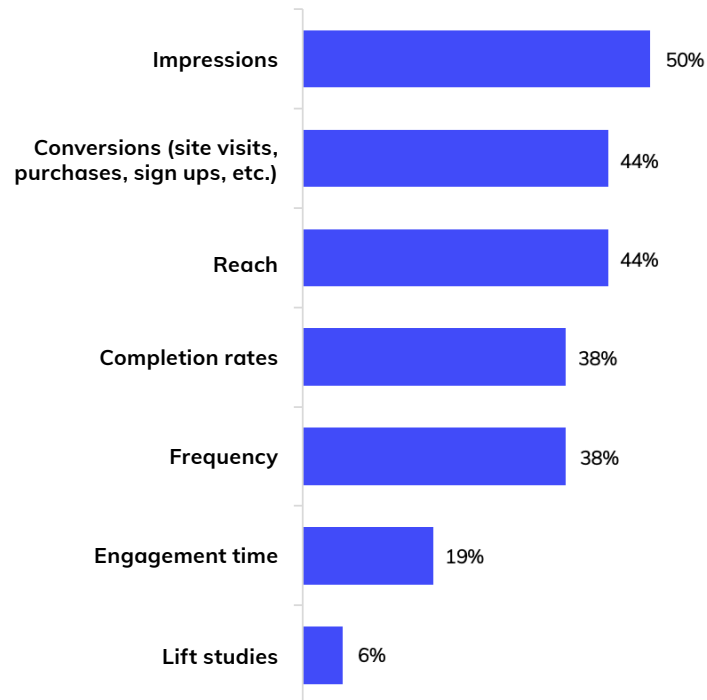
Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Survey of 52 total automotive marketing professionals conducted through SurveyMonkey in May 2025

These issues hinder marketers' ability to understand cross-channel performance, manage duplication, optimize spend, and create cohesive brand experiences across screens. Notably, only 6% of respondents prioritized Optimizing Campaigns and Creatives in Real-Time, not because the infrastructure isn't there, but likely because many automotive brands have yet to fully adopt or operationalize these capabilities.
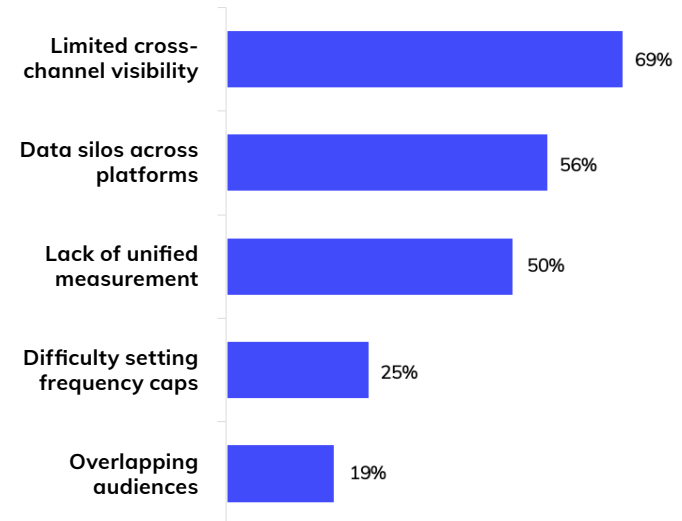
Ultimately, as automotive marketers shift more dollars into CTV, they're looking for more than reach— they're looking for relevance and impact. Unlocking the full potential of CTV will require more adoption of creative tools and unified measurement frameworks that allow for seamless, scalable, cross-platform campaigns.

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Which metrics are most important when evaluating CTV/live sports campaigns?

Metric	Value
Impressions	50%
Conversions (site visits, purchases, sign ups, etc.)	44%
Reach	44%
Completion rates	38%
Frequency	38%
Engagement time	19%
Lift studies	6%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Survey of 52 total automotive marketing professionals conducted through SurveyMonkey in May 2025

What are the biggest challenges you face with frequency management today?

Challenge	Value
Limited cross-channel visibility	69%
Data silos across platforms	56%
Lack of unified measurement	50%
Difficulty setting frequency caps	25%
Overlapping audiences	19%

Source: Mediaocean 2025 H2 Automotive Market Report
Methodology: Survey of 52 total automotive marketing professionals conducted through SurveyMonkey in May 2025

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Conclusion

As automotive marketers enter the back half of 2025, the road ahead is defined by focus. The data paints a clear picture: brands aren't pulling back—they're shifting gears. From media mix to marketing operations, the emphasis is on precision, personalization, and measurable value.

Ad spend is tightening but not retreating. Automotive marketers are reallocating toward high-impact channels like CTV and Search, while exploring value in formats like Retail Media and Radio/Audio. The common thread: a sharper lens on performance and accountability.

Strategic priorities are also evolving. Investments in Demand Generation and First-Party Data Mastery signal a shift toward long-term pipeline building and durable customer relationships. At the same time, rising interest in Privacy underscores the importance of maintaining trust and compliance amid a changing data landscape.

Consumer trends show a clear winner: Generative AI. With 82% of marketers naming it the top trend, AI has moved from buzz to business driver—reshaping how automotive brands create, connect, and convert. Meanwhile, proven platforms like CTV are holding strong, even as attention to once-hyped trends like the Metaverse and Gaming fades.

AI adoption across marketing functions continues to scale. From Customer Service to Market Research to Website Development, automotive marketers are embedding Gen AI into daily workflows. While media planning transformation may be slower, creative optimization is on the brink of meaningful disruption.

CTV continues to mature as a full-funnel solution, with equal emphasis on reach, interactivity, and personalization. But operational challenges—driven by data silos and fragmented measurement—highlight the need for connected infrastructure and real-time coordination.

Looking ahead, the remainder of 2025 presents both a challenge and an opportunity. Automotive marketers must build agility into every layer of their operations—from audience strategy to media activation to creative production. Those who do will not only weather the changing landscape—they'll be positioned to lead in 2026 and beyond.

Methodology

This survey, conducted via SurveyMonkey in May 2025, references data collected from a specific subset of 52 leading automotive advertising industry professionals as part of the Mediaocean 2025 H2 Market Report, which surveyed 464 marketers worldwide.

Note: Values shown in graphs are rounded to the nearest whole number; all percentage changes noted in the body copy are based on actual unrounded data.

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About Mediaocean

Mediaocean is powering the future of the advertising ecosystem with technology that empowers brands and agencies to deliver impactful omnichannel marketing experiences. With over $200 billion in annualized ad spend running through its software products, Mediaocean deploys AI and automation to optimize investments and outcomes. The company's advertising infrastructure and ad tech tools are used by more than 100,000 people across the globe. Mediaocean owns and operates Prisma, the industry's trusted system of record for media management and finance, Innovid, the leading independent ad tech platform for creative, delivery, measurement, and optimization, as well as Protected by Mediaocean, an integrated solution for ad verification and brand safety. Visit www.mediaocean.com for more information.