

## Warc: Media in 2025 - Defined by abundance, driven by algorithms

Warc's *The Future of Media 2025* report examines how the endless optionality within the media ecosystem creates new opportunities for marketers to drive effectiveness and deliver growth.



Source: © 123rf [123rf](#) Warc's *The Future of Media 2025* highlights trends in media planning, advertising investments and the media ecosystem

It looks at how Google search is being disrupted by social and retail platforms as well as the growing influence of artificial intelligence (AI), and finally, the developments within the retail media and commerce sector and how advertisers can adjust to an environment where commerce is increasingly 'everywhere'.

Paul Stringer, managing editor, research & insights, Warc, says: "Today, media is so vast, so complex, and so changeable, that it can be difficult for brands to make sense of it all.

"As we reach the midpoint of the decade, this is also the most exciting time to be a media planner.

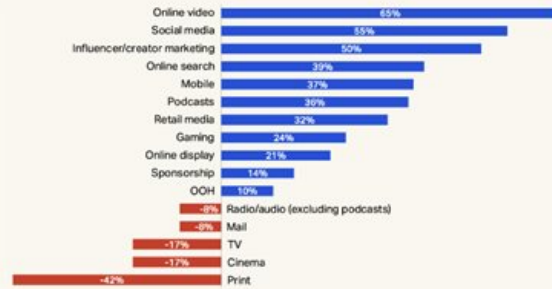
### Global advertising spend

Warc's [latest forecasts](#) show that global advertising spend surpassed \$1trn for the first time in 2024, and is expected to grow 10.7% this year, to a total of \$1.08trn.

Global ad spend has more than doubled over the last decade, growing 2.8x faster than global economic output since 2014, with more media channels available to marketers than ever before.

## How do you expect investment in media channels to change in 2025?

Net Sentiment Percentage



Note: Net Sentiment Percentage equals the percentage of respondents that expect investment to increase minus the percentage of respondents who expect investments to decrease.  
Source: WARC, Voice of the Marketer report, 2024.

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## Warc Future of media 2025 trends

The key trends outlined in The Future of Media 2025 are:

- **Planning in an era of abundance**

Media diversity brings new opportunities for brands to drive growth over the short- and long-term using smart combinations of different media channels.

Planning holistically and choosing the right combination will be different for every brand and vary by context and objective.

Media quality, reach and price, will be critical in helping planners determine the optimum stack for brands.

As spend and sentiment shift to channels like social, influencers, podcasts and gaming, new tactics for brand building are emerging. Advertisers are adapting campaigns for platforms where attention is more fleeting, and lots of little exposures need to work together to improve brand outcomes.

Across channels like search and social, advertisers will be required to adapt campaigns to fit the preferences of algorithms.

This may mean adopting new methods and processes or putting more trust in AI systems to automate parts of campaign management - even if this means sacrificing autonomy and control.

- **New challenges and opportunities in search**

This year, more than \$220bn will be spent on generic search globally, per Warc forecasts, with Google taking more than 80% of the share.

However, social media is rivaling Google as the young people's search platform of choice for brand discovery.

The future of search appears to be about intent rather than information, supported by sophisticated uses of AI.

Developments in AI are leading traditional search providers and new entrants to compete to “identify consumer intent in ever more granular ways”.

Access to these insights should help brands build a more sophisticated and nuanced understanding of audience behaviours, leading to more personalised and relevant communications.

AI-driven search requires a rethinking of search engine optimisation (SEO).

Shortly, brands may need to optimise messaging and content to ensure they are visible and represented favourably in AI-based search results.

This approach - which some are calling Large Language Model Optimisation (LLMO) - will require a different set of skills and processes compared to traditional SEO.

Brands may need to adopt more diverse search strategies to account for the growing fragmentation of search experiences across retail and social platforms and variables such as audience, type of search and category.

- **Retail growth fuels commerce media expansion**

Commerce is increasingly everywhere. Retail media is expanding, reaching \$154.8bn in advertising spend globally in 2024 with a further 14.8% rise expected in 2025, per Warc Media.

New commerce media platforms are launching, and social commerce is continuing to grow rapidly.

Commerce media is becoming the infrastructure that underpins the entire digital advertising ecosystem and offers brand-building potential.

Many retail and commerce media platforms now sell ads that allow advertisers to reach consumers across the purchase journey, from awareness all the way through to conversion.

Advertisers will need to weigh up these opportunities carefully, supported by holistic measurement that allows them to show the impact of commerce on long-term brand and business metrics.

New entrants may struggle to win spend from incumbents.

Advertisers already admit to feeling overwhelmed by the number of options available in the commerce space and highlight a lack of standardisation across platforms as their biggest challenge with retailers.

In the short term, this may curtail the growth of new entrants as advertisers prioritise working with just a few large and established networks. Retail spending puts brand budgets at risk.

Many advertisers appear to be divesting from traditional advertising channels to spend more on lower funnel ads on retail media networks.

Advertisers should protect traditional advertising budgets to avoid a vicious cycle of weakening their brand while raising the cost of driving performance on retail media properties.

## **Maturing of digital advertising**

“Digital advertising has matured beyond direct response to support brand-building and long-term effectiveness, advertisers are focusing more on quality over cost when deciding which media environment to advertise in, and signal fidelity is improving thanks to the growth of AI-powered media solutions and an influx of retail media and commerce media networks.

“With this report, we aim to help marketers navigate these challenges and opportunities as we explore the three key trends set to shape the media and advertising environment this year,” says Stringer.

The *Future of Media 2025* is based on data and insights from Warc, including Warc’s Marketer’s Toolkit global survey of 1000+ marketing executives, and external research.

It is part of Warc’s Evolution of Marketing programme helping marketers address major industry shifts to drive effective marketing, and follows the recent publication of Warc’s The Voice of the Marketer 2025, The Marketer’s Toolkit 2025 and The GEISTE report.

Warc members can read the [full report](#). Complementing The Future of Media 2025 and associated report are a series of [podcasts](#).

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