

US YouTube & Connected TV Media Agency Survey 2025

 A PIXABILITY REPORT

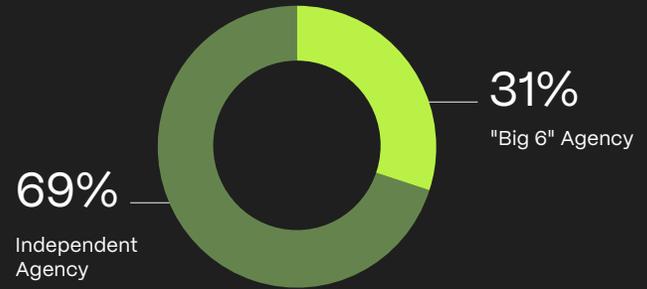


INTRODUCTION

In November 2024, Pixability surveyed 124 US-based media agency professionals that work directly on YouTube and/or Connected TV (CTV) campaigns for brand advertisers. This report details top-level results of the survey to show how YouTube and CTV advertising strategies evolved in 2024, and how agencies see them evolving further in 2025.

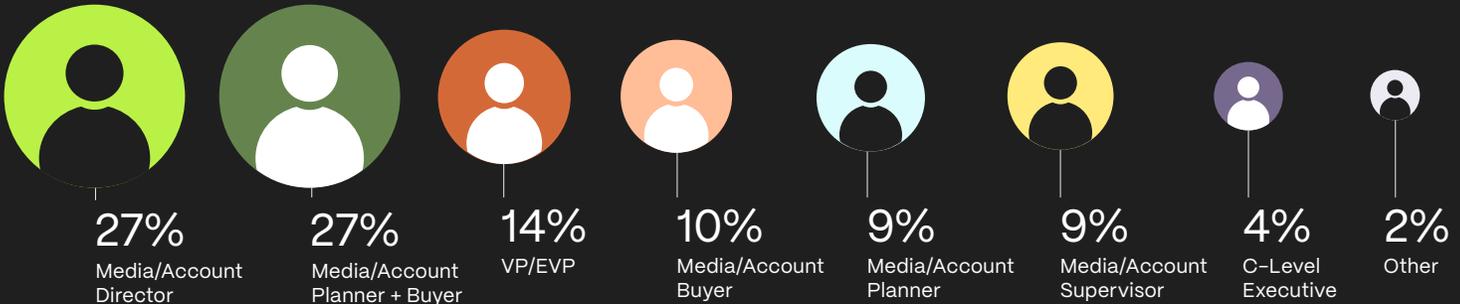
Agency Affiliation

Q. How would you best describe your agency?



Respondent Role

Q. Which of the following best describes your role at your agency?



Agencies continue to invest heavily in YouTube



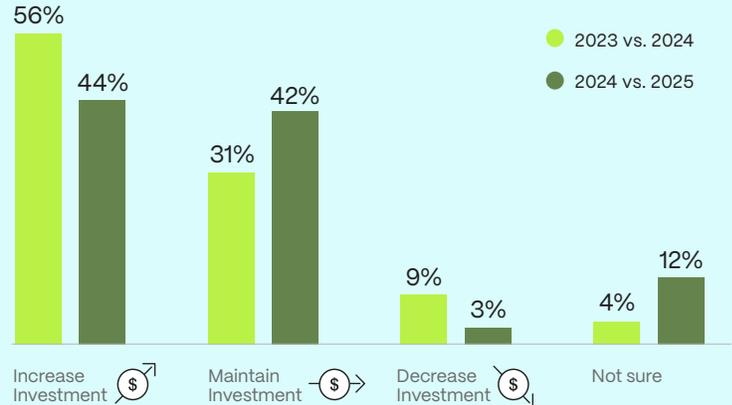
Most agencies are increasing or maintaining investment with very few decreasing YoY

Over half of agencies (56%) say they saw an increased investment in YouTube from their clients in 2024. Going into 2025 we will continue to see many agencies increasing (44%), but many (42%) believe YouTube budgets may be flat after the big bump in 2024. Very few saw a decrease in 2024 (9%) with even fewer predicting a decrease for 2025 (3%).

Media agency investment in YouTube YoY

Q. How has your YouTube strategy evolved in 2024, compared to 2023?

Q. As you plan your YouTube strategy for 2025, how does it compare to this year?



CTV & YouTube saw increases, Meta somewhat flat, Linear continued to see decreases

The shift in spend from Linear TV to CTV continues as 58% of agencies saw an increase in CTV spend and 56% saw an increase in YouTube spend in 2024 with only 13% seeing an increase in traditional TV advertising. In addition, some of the public pushback against Meta may be reflected in the somewhat flat spend on Facebook/Instagram.

Investment in 2024 compared to 2023				
	Investing less than last year	Investing about the same as last year	Investing more than last year	Not sure
CTV	3%	25%	58%	14%
YouTube	9%	31%	56%	4%
Meta	8%	37%	40%	16%
TikTok	13%	24%	31%	32%
Linear TV	32%	35%	13%	20%

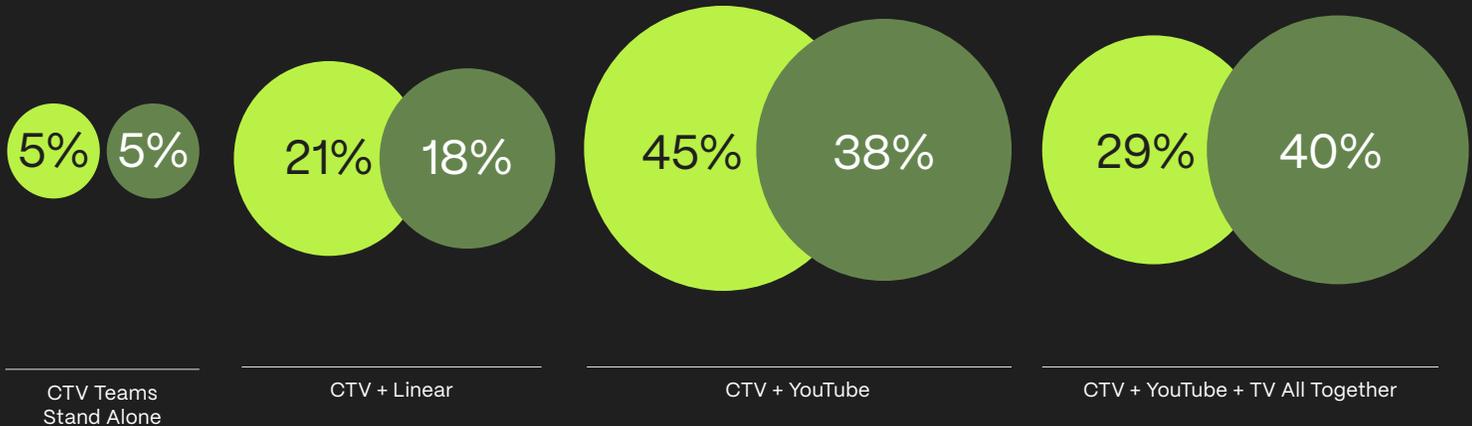
Q. How is your marketing strategy evolving across the following platforms and categories?

Agency teams are set up in many different ways, but many plan to move towards more unified teams across CTV, YouTube, & TV

Agencies expect CTV, YouTube, and TV teams will increasingly merge

Which of the following best describes how your agency's teams are arranged currently, and which best describes how the teams will be arranged in the near future?

- Today
- In the Future





"YouTube continues to be an incredibly important piece of the puzzle for the brands we work with. With the complexity of YouTube campaigns only increasing, it's critical that we ensure that we maximize outcomes for advertisers, while also running the campaign on content that aligns with the brand's values."

Jordan Pennino
VP, Digital & Programmatic

dentsu

Agencies are increasingly emphasizing performance, efficiency, & outcomes on YouTube

For the past two years of this survey, Brand Safety and Ad Performance have been the top two priorities for agencies when running on YouTube. We see a shift this year where a slew of performance-related topics have climbed up the list. Ad Performance, Measurement, Efficiency, Audience Targeting and Outcomes are all seeing a slight rise in emphasis in comparison to Safety and Suitability. Agencies still see Safety and Suitability as extremely important, but many 3rd parties have focused on just those pieces, without making sure campaigns are also delivering business outcomes.

Importance of each objective when executing YouTube campaigns

How much does each of these objectives matter to you and your agency when executing YouTube campaigns? (ranked 1-5, with 1 being not at all important, and 5 being very important)

Ad Performance (view rate, view-to-completion rates, click-through rates)	4.65
Measurement/Reporting (Extracting meaningful insight from campaigns)	4.61
Efficiency (ensuring our client is driving value for their investment)	4.57
Audience Targeting (reaching consumers based on audience/demographic data)	4.55
Business Outcomes (conversions, in-store visits, app downloads)	4.48
Brand Safety (ensuring that my ads do not run against unsafe content)	4.47
Brand Suitability (ensuring that my ads do not run against content that is unsuitable for my brand)	4.45
Awareness or Brand Lift (ad recall, brand favorability)	4.36
Reach/Scale (reaching enough consumers to meet my strategy requirements)	4.35
Behavioral Targeting (reaching consumers based on intent and preference data)	4.33
Pacing (being able to stay on a daily budget)	4.29
Contextual Targeting (reaching consumers based on what content they're watching)	4.18
Ease of Campaign Management (saving time and can manage all the moving parts of video campaigns)	4.16
Consideration (Search Lift)	4.04
Ad Frequency (reaching and re-marketing to consumers an effective number of times in a campaign)	3.98
Driving Impact on TV Screens (reaching audiences in the living room)	3.66

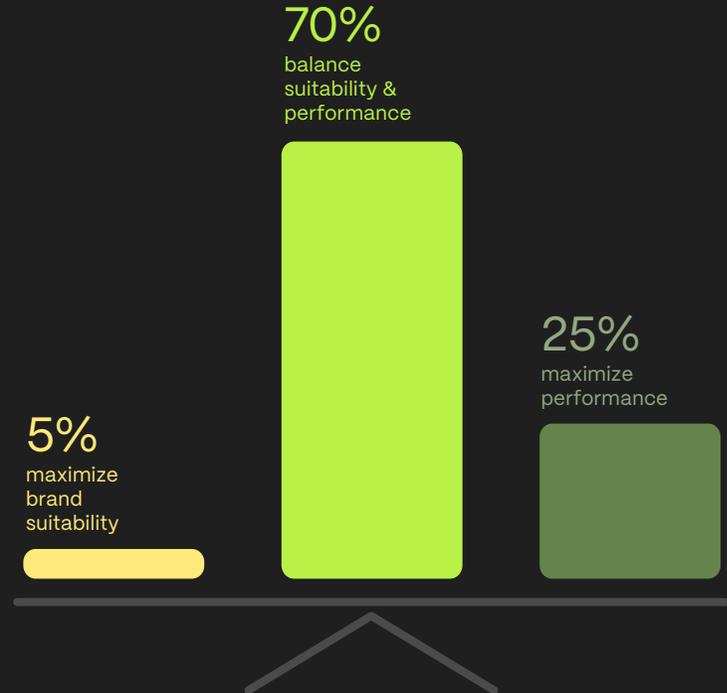


Balancing brand suitability & performance continues to be key for agencies

Overall, agencies know that almost every client of theirs wants their campaigns to both perform and run on brand safe/suitable content. We've seen this desire for balance every year in the survey, but as we saw on the previous page, agencies are tiring of 3rd parties that focus only on suitability without making sure the performance KPIs are all satisfied.

Most brand advertisers want to balance suitability and performance

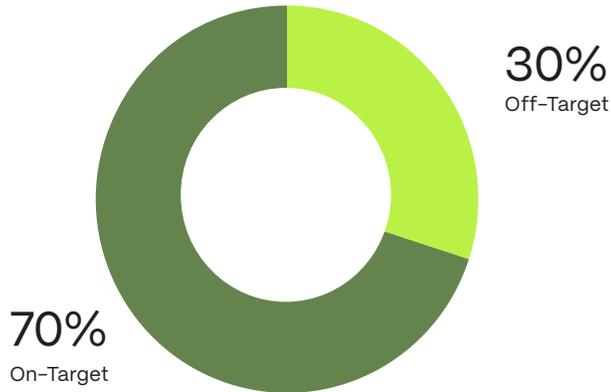
Q. Which of the following best describe your clients' priorities when executing YouTube campaigns?



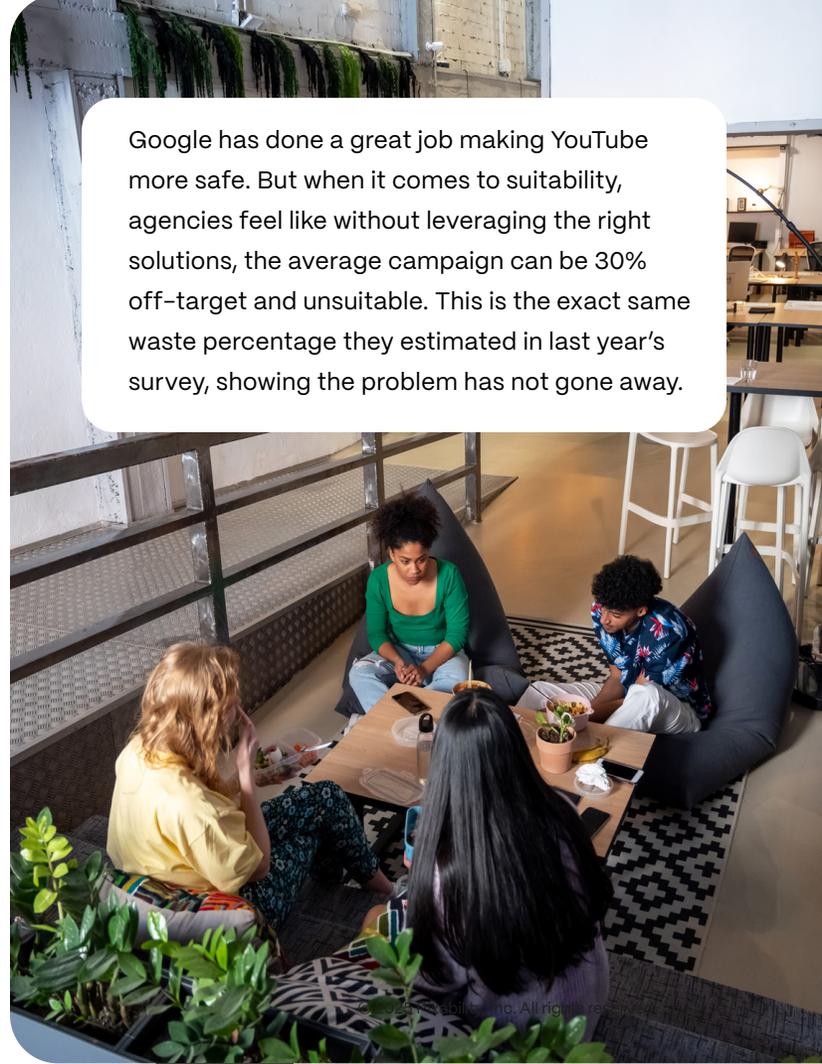
Brand suitability alignment: agencies indicate the risk of not using the right measures

Percentage of campaign impressions that respondents estimated would be on content that didn't specifically align with the brand's values if brand suitability measures were not used

Q. In your experience, when running a campaign on YouTube WITHOUT using any third-party pre-bid brand suitability measures (exclusions, inclusions, or other methods), what percentage of the campaign impressions do you think would run on inventory that was NOT perfectly brand suitable for the advertiser?



Google has done a great job making YouTube more safe. But when it comes to suitability, agencies feel like without leveraging the right solutions, the average campaign can be 30% off-target and unsuitable. This is the exact same waste percentage they estimated in last year's survey, showing the problem has not gone away.

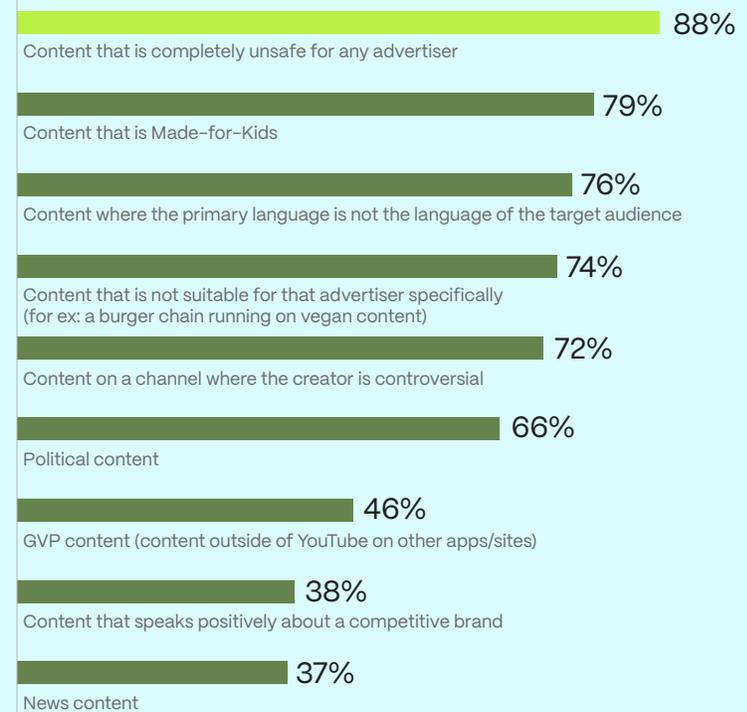


Agencies look to avoid multiple different types of unsuitable content on YouTube

In addition to avoiding anything that is completely unsafe, agencies want to avoid many other types of content including Made-for-Kids content (79%), content in a language outside the target (76%), and content not suitable for the specific advertiser (74%), when targeting adults on YouTube. While it's good to see that most agencies don't see News content as something to avoid, it's important for all agencies to embrace new ways to target reliable news content for advertisers, so the ad industry can continue to support good journalism.

Percent of agency respondents that believe their clients would want to avoid each type of content on YouTube when targeting adults

Q. For a YouTube campaign targeting adults, which of the following types of YouTube inventory would a typical client want to avoid to minimize waste? (Select all that apply)



“Brand suitability on YouTube continues to be a key priority for many of the brands we work with. Advertisers aim to minimize risk by appearing only alongside content that aligns with their values while ensuring strong performance to meet campaign objectives.”

Michael Consolazio

Vice President Group Director, Media Technology

GROUPECONNECT



Working with 3rd parties that are Google certified and part of the YouTube Measurement Program is more important than ever

The YouTube Measurement Program (YTMP) is set up to ensure that 3rd parties are using acceptable practices in how they drive suitability and share insights with advertisers. In a time when advertising on YouTube has become increasingly complex, the majority of agencies believe their partners should have this certification.

Percent of agencies who believe 3rd party YouTube partners should be certified by the YouTube Measurement Program (YTMP)

Q. How important is it to you that your YouTube partner for Brand Suitability be certified by Google, as an approved YTMP partner in Brand Suitability & Contextual Targeting?

78%
important



9%
not important



13%
N/A

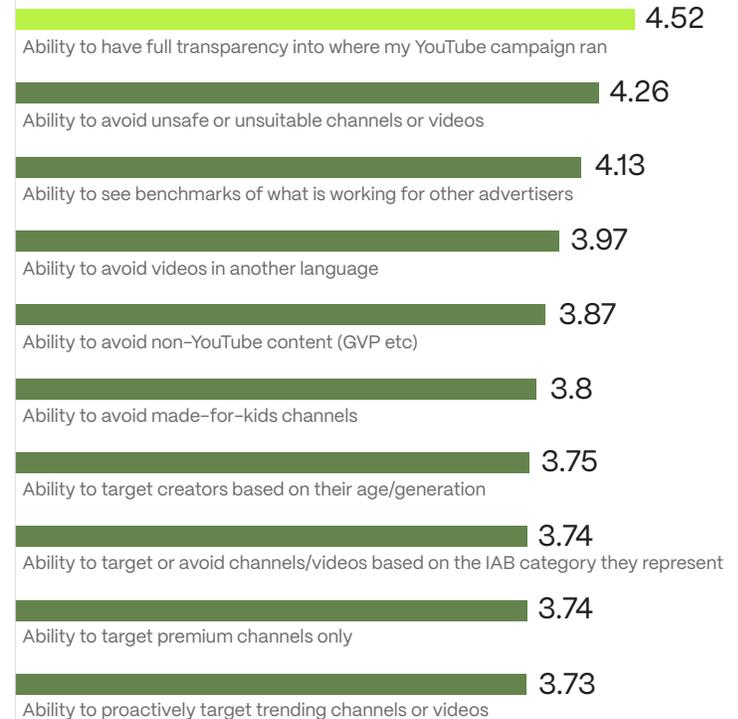


Transparency and Suitability/Safety are still major pieces agencies feel they're not getting from Google's native platforms

Google's platforms have come out with more exciting new ad strategy options this year than ever before. That said, there are still pieces of the puzzle that agencies and brands are missing including transparency, safety/suitability, advertiser benchmarks, and various targeting capabilities.

Important YouTube capabilities needed that are lacking in Google's native platforms

Q. Thinking about what it's like to manage YouTube campaigns on Google's platforms, which of the following things are most needed that are not provided by Google?





"With the growth of YouTube Shorts, YouTube has become a leader in short-form social video right alongside TikTok. We've seen great success in incorporating Shorts in advertising plans for clients, alongside other tactics that drive high audience engagement and maximized reach and performance."

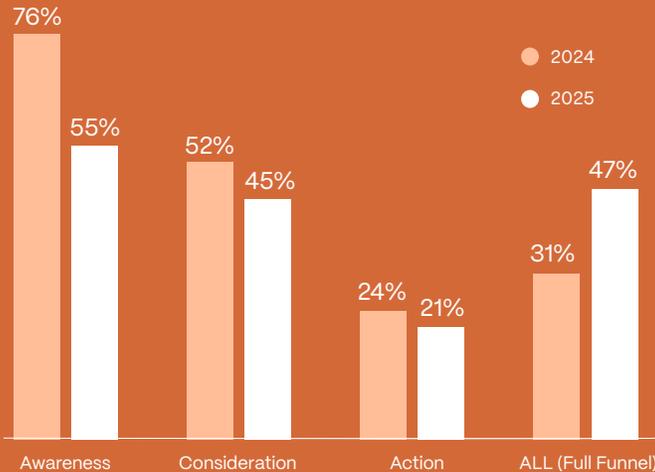
Melissa Sierra
EVP, Media Integration



YouTube is increasingly being used to achieve full funnel KPIs

Percent of agencies who used YouTube for each of the following reasons in 2024 vs. planned for 2025

Q. In 2024, which part of the marketing funnel did you use YouTube to help achieve your goals? Q. In 2025, which part of the marketing funnel do you plan to use YouTube to help achieve your goals?

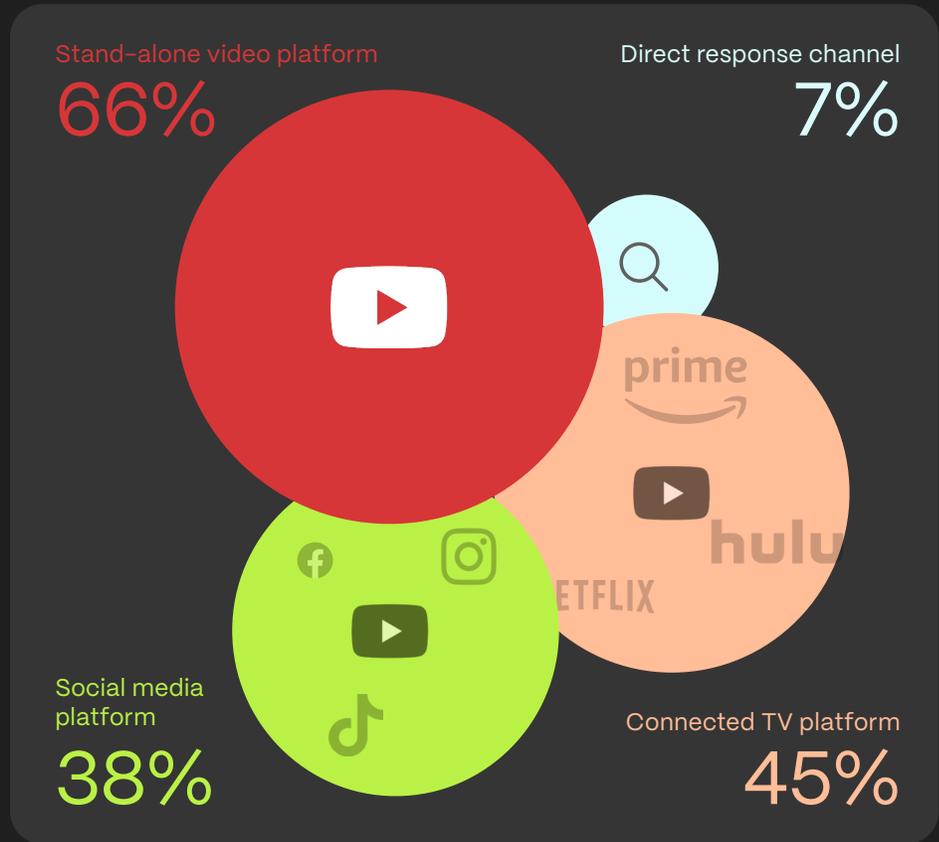


In the early years of YouTube, the platform was thought of as an awareness play only. While it is still a critical tool for awareness, agencies are increasingly looking to use it as a full-funnel platform. In fact, we're seeing agency respondents predict that they will use YouTube for full-funnel almost as much as they'll use it for awareness in 2025 (47% vs. 55% respectively).

As YouTube's capabilities have increased, the complexity of where YouTube lives within an agency has increased

Agencies categorize YouTube in multiple ways

Q. How would you categorize YouTube in your overall marketing strategy? (select all that apply)





“While brands have long recognized YouTube’s value as an online video advertising and social platform, it’s time to fully embrace it as a Connected TV (CTV) leader. YouTube is not only the No. 1 streaming platform in terms of TV viewership and reach, but also stands out with its predominantly ad-supported model—a sharp contrast to competitors like Netflix, which heavily rely on ad-free subscriptions.”

Erin Mullaney
Media Director





About Pixability

Pixability is the leading AI-driven technology company empowering the world's largest brands and their agencies to maximize the value of their video advertising on YouTube and CTV. Leveraging its proprietary technology platform and data, Pixability makes every video impression matter by identifying contextually relevant, brand suitable inventory and maximizing cost efficient outcomes. This is why we are known as The YouTube Outcomes Platform.

Awards & Recognition



YouTube Measurement Program Certifications



Want to Learn More?

If you'd like to see deeper results of this study not shown in this report, let us know and we can schedule a call or in-person presentation for your teams.

[Let's connect!](#)

