

## CTV Unwrapped

2025

The Holiday Advertising Trends Report



Even when you plan every detail, the holidays have a way of going off script.

The turkey that looked like golden perfection on the outside, but was still frozen solid on the inside. The tree that looked straight on the farm, until it toppled over in the living room. The perfectly planned lights that ended up with fried wiring (hello, Griswolds).

Marketers know this feeling all too well, but especially during the high-stakes holiday season. Between shifting budgets, channel planning, and attribution chaos, even the most thoughtful plans can end up as holiday mishaps.

To better understand the challenges, trends, and priorities for marketers this holiday season, tvScientific surveyed more than 600 marketers who have a role in advertising programs. Here's what they said.

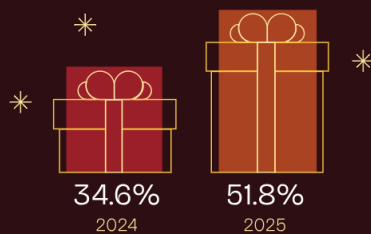
## CTV is the gift that keeps performing

When the holiday pressure hits, marketers look for more than just shiny new channels. They look for ones that deliver – like CTV.

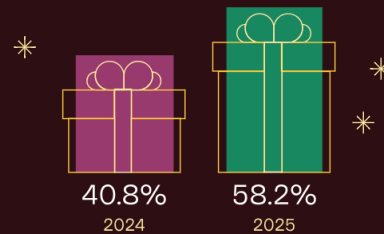
CTV will be the #2 most-used channel for holiday campaigns this year, up slightly from the #3 spot last year.



## Marketers planning to use CTV



## Marketers whose CTV holiday budget is increasing



Marketers aren't betting on it because it's trendy. They're investing because they've seen results – from past holiday campaigns, non-holiday campaigns, and the halo effect CTV has on other channels.

58.2% say their CTV holiday budget is increasing, which is a major jump from the 40.8% who said the same in 2024.

CTV is stepping into its power. It offers incremental reach, premium inventory, and measurable outcomes, all in a format that works across the funnel. And with more marketers embracing performance-based models like cost-per-outcome buying, it's becoming easier to tie CTV directly to business results.

At the same time, other channels like social are saturated and plateauing. Every brand with a promo code and Mariah Carey remix is chasing the same distracted, deal-hunting, scroll-happy shoppers. It's a race to win their attention on social, and you know who's already there? Your competition.

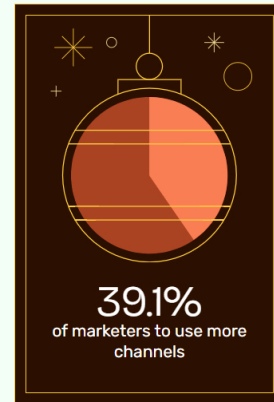
# The fight for holiday attention

57.1% of marketers have a bigger budget for holiday advertising this year (not exclusive to CTV). But while budgets are up, so is the competition.

Standing out continues to be one of the biggest challenges marketers face. (Our 2025 State of Performance TV report revealed this is a marketer's #1 source of stress.)

Competing with big-box retailers and ecommerce brands, like Amazon, brings on a lot of pressure. In fact, Amazon's Prime Day in October has also become a motivating force for marketers to adjust their holiday strategies.

## Amazon's annual Prime Day sale inspires:



Marketers are responding by getting scrappy, strategic, and everywhere their audience is. That means more diverse channel mixes and more urgency to share the right message at the right moment.

For example, a brand might use CTV to build upper-funnel awareness in the week leading up to Prime Day, then retarget those viewers with app-based or social offers the moment prices drop.

Brands could also use predictive AI to identify when specific audience segments are most likely to convert, then timing their CTV campaigns around those high-intent windows. That could look like shifting ad delivery to weeknights instead of weekends, or front-loading spend before competitors even launch.

## 'Tis the season to be agile

Marketers are betting on strong Q4 performance, especially after 2024's record-breaking Cyber Monday, where consumers spent \$13.3 billion.

But 54.2% are still concerned that market conditions will hurt spend this year. They expect they'll have to adjust plans to account for this, and here's how they'll do it.

### 53.7% will adjust messaging as needed.

They're leaning into value-forward creative and messaging, highlighting bundles, price drops, or loyalty perks.

For CTV, that means testing multiple spots with slight variations: one on savings, one on urgency, for example. A/B testing can also quickly show what's working.

### 56.1% will change timing to match demand.

Activations are starting earlier this year, with the majority split between August (20.5%) and September (20.5%). (Marketers were split between September and October last year.)

But instead of launching everything at once, marketers are using phased rollouts: building awareness early and ramping up performance-driven creative around high-intent windows like Prime Day and Black Friday Cyber Monday.

### 58.9% will shift budgets between channels.

Marketers are watching early signals to see which platforms drive the most qualified traffic and conversions, then reallocating spend accordingly.

For CTV, that might mean shifting dollars away from broad awareness placements and into cost-per-outcome buys. AI can help make these decisions. Things like inventory recommendations, smarter bidding, and automated budget optimization are all possible with the right tech.

What changes are you making to your campaign approach due to consumer spending concerns?



58.3%  
of marketers will  
use predictive AI to  
inform targeting  
and optimization

## Measurement doesn't sleigh (yet)



**59%**  
of marketers say  
performance is their  
primary goal for CTV

Almost 57% of marketers say they're feeling more pressure this year to show outcomes from their holiday campaigns, especially as their budgets climb and expectations follow.

On the surface, the intent is obvious: nearly 60% of marketers say performance is their primary goal for CTV. But when it comes to how they measure success, there's a disconnect.

When asked to rank metrics by importance, reach, frequency, and incremental lift were at the top (in order). ROAS and pipeline ranked #4 and #5, respectively, showing a clear gap between aspiration and measurement maturity.

This isn't a knock on marketers. It's a signal that measurement tools (or access to them) aren't where they need to be.

Programmatic platforms, like tvScientific, help bridge this gap by tying CTV impressions directly to lower-funnel outcomes like sales. Cost-per-outcome buying, predictive targeting, and real-time optimization help marketers move away from reporting on what's easy and toward reporting on what matters most.

**#1**

Reach

**#2**

Frequency

**#3**

Incremental  
Lift

**#4**

ROAS

**#5**

Pipeline

## That's a wrap

Holiday campaigns, like holiday plans, rarely go exactly as expected. The lights get tangled. The timing shifts. The perfectly baked strategy might still end up a little undercooked.

But this year, marketers aren't letting the chaos catch them off guard. They're planning smarter, optimizing in real time, and leaning into channels (like CTV) that actually deliver measurable outcomes, not just warm holiday vibes.

With the right mix of agility, AI, and attribution, even the most high-stakes holiday campaign doesn't have to go off script. Instead, it might just outperform it.



Drive outcomes on TV,  
**Guaranteed.**

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