

United States

The Commerce Swell: How Marketers are Riding the New Media Wave

The industry's response to evolving media and
consumer behaviors

Why now?

Because consumers have changed – and they are not going back.

They want to discover and buy on their terms, in their moments.

They are scrolling, watching, clicking, and expecting more from every digital experience.

Commerce is no longer a destination. It is a behavior, embedded in content, media, and moments of attention.

Yet much of the media landscape has not caught up. We are still planning against outdated funnels, measuring proxies for performance, and missing the opportunity right in front of us: the moment of intent.

Commerce media is the most exciting shift since programmatic. But it is not just a new format. It is a mindset where media, measurement, and action converge.

This report does not just validate the category. It makes the case for urgency: if you wait, your competitors will not just beat you to market. They will beat you to the moment of transaction.

Because media that sells is no longer futuristic. It is expected.

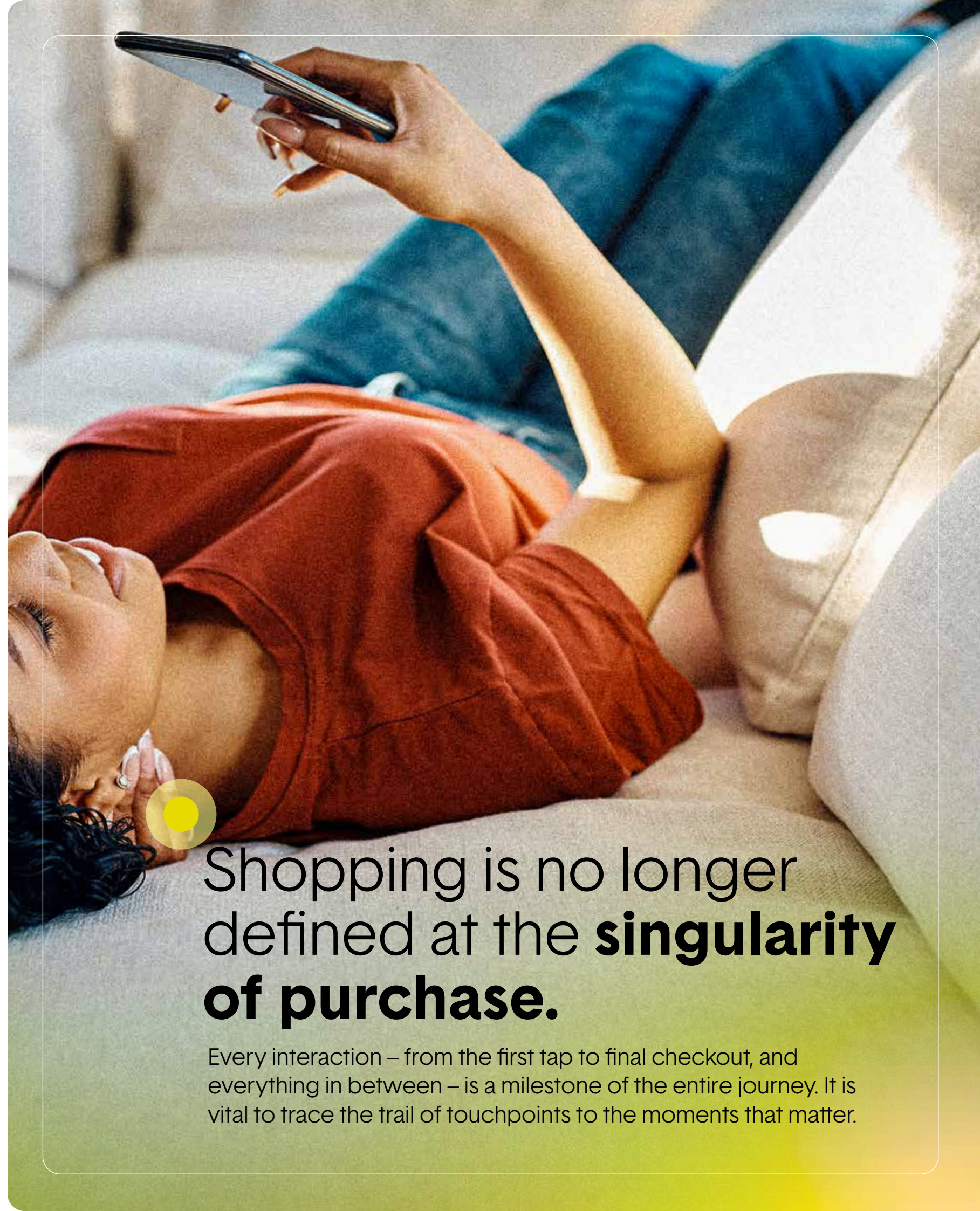
And because the consumer is still first.

Welcome to the new era of content and ads that convert.

Digital shopping has changed – let us lead it.

Nick Morgan

CEO and Founder of Vudoo



Shopping is no longer defined at the **singularity of purchase.**

Every interaction – from the first tap to final checkout, and everything in between – is a milestone of the entire journey. It is vital to trace the trail of touchpoints to the moments that matter.

Key takeaways

91% of shoppable ad users say it's important to **adjust budgets based on emerging trends**

80% recognize behavior-driven models, reflecting a shift away from linear funnel theory

CTV and AI adoption are accelerating – especially among those investing in shoppable or interactive formats

Commerce media now represents **31% of media spend on average**

Commerce-curious marketers cite **technical integrations and measurement** as key blockers



Executive summary

The traditional funnel model that has long guided marketing strategies in the US and abroad is not facing extinction just yet, but its long-term viability is at risk.

With campaign performance as the North Star, approaches are now shifting towards behavior-based outcomes – a practice recognized by 80% of marketers.

While technological adoption and team coordination threaten to hamper success, progressive marketers are drawn towards the lucrative potential of commerce media. They pursue innovative formats and methods to bolster their game plans in the face of changing consumer behaviors. Marketers in the US are at large forward-thinking and adapting for the future in real-time.

Those ahead of the commerce media curve have already bet on new opportunities such as shoppable advertising and in-video checkout via Connected TV (CTV), which is already resulting in greater satisfaction.

This forward thinking consequently directs budget to these formats, adjusting strategy on the fly.

Of course, AI is the elephant in the room. Its potential to enhance operations and strategy is undeniable but concerns remain about brand integrity and control.

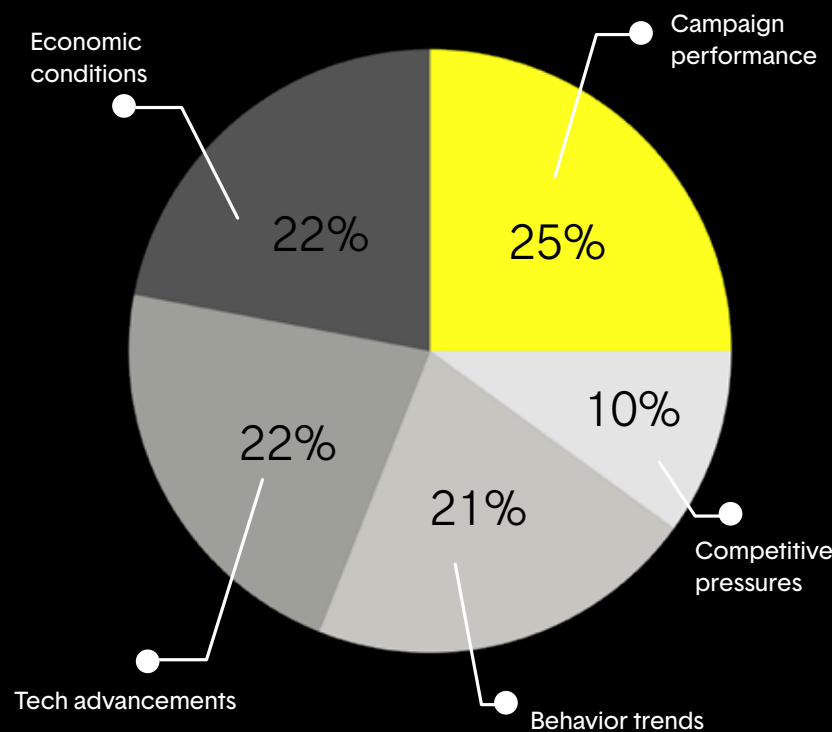
The once-rigid industry is transitioning into a progressive one informed by data that sees into the future. Players prepared to try new tools to unlock the full potential of commerce media will be at the cutting edge of US-based and global marketing for years to come.

Decision drivers and progress blockers

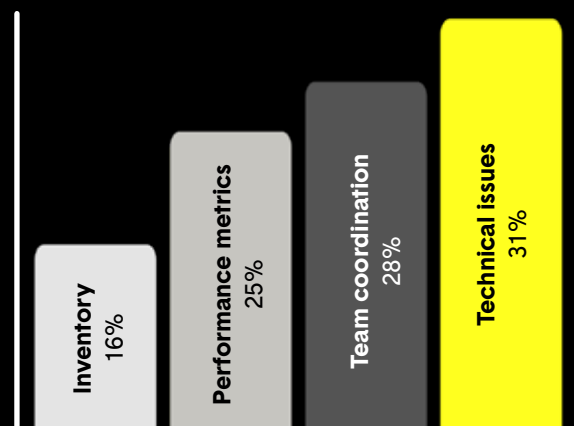
Campaign performance is the #1 factor in budget decisions

Economic conditions, technological advancements, and behavioral trends also play a considerable role.

The motivation to deliver results and demonstrate tangible value is why marketers continue to prioritize performance-led strategies, with the trio of external factors influencing smarter, more informed investment decisions.



Survey Question: What is most important when thinking about current budget allocation?



Technical issues are the #1 challenge that marketers face

Team coordination and performance measurement are also prominent blockers. Technical barriers, such as integration complexity, attribution limitations, and data privacy compliance are often spread across multiple teams and limit overall success. Fragmented organizations highlight the need for more robust infrastructure and stronger cross-functional alignment.

Survey Question: What are the primary challenges you face in digital media?

Larger Company Blockers

64%

face cross-channel execution issues

57%

mention attribution and measurement

53%

encounter insufficient data quality

For large organizations, complexity – not capability – is the biggest hurdle. With data siloed across fragmented marketing channels, executing seamless cross-channel campaigns with accurate attribution measurement is their greatest challenge.

Smaller Company Blockers

66%

navigate privacy and regulatory pressures

53%

experience budget and resource limitations

49%

grapple with siloed teams and coordination

Small organizations are feeling external pressures more acutely as they juggle tight budgets and rising compliance demands while working with limited resources and siloed teams.

Modern marketing measurement

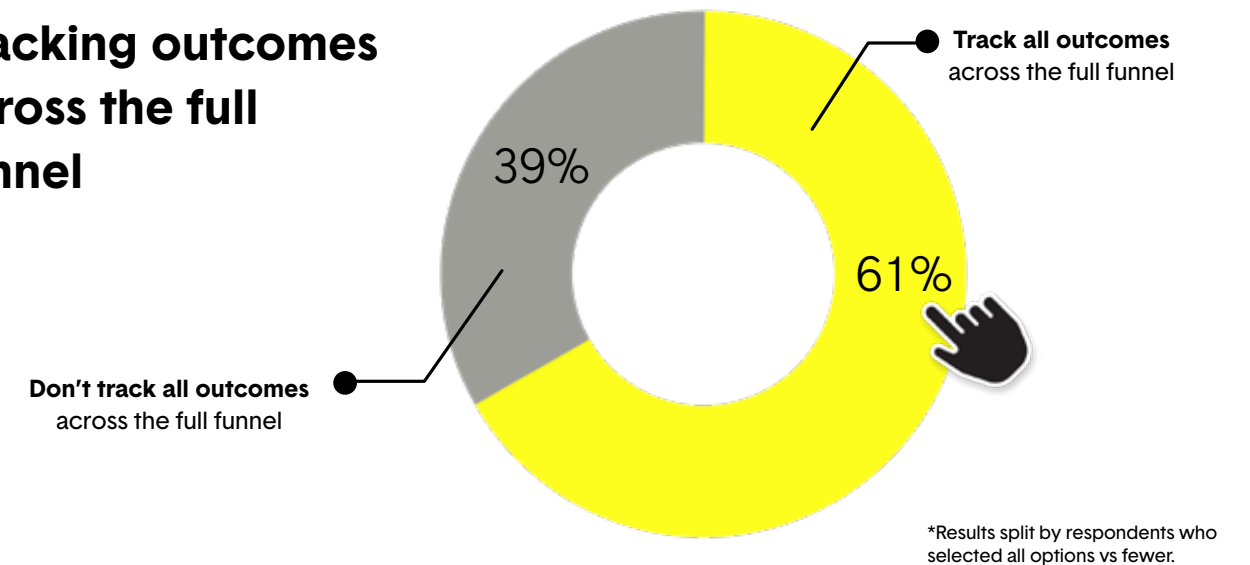
More than 50% of marketers report satisfaction when measuring outcomes through **non-linear paths.**

Despite 61% still tracking outcomes across the full funnel, only **43% consider it as the most effective approach to take.**

Instead, **80% prefer real-time, behavior-based approaches** that track multiple touchpoints and post-purchase engagement.

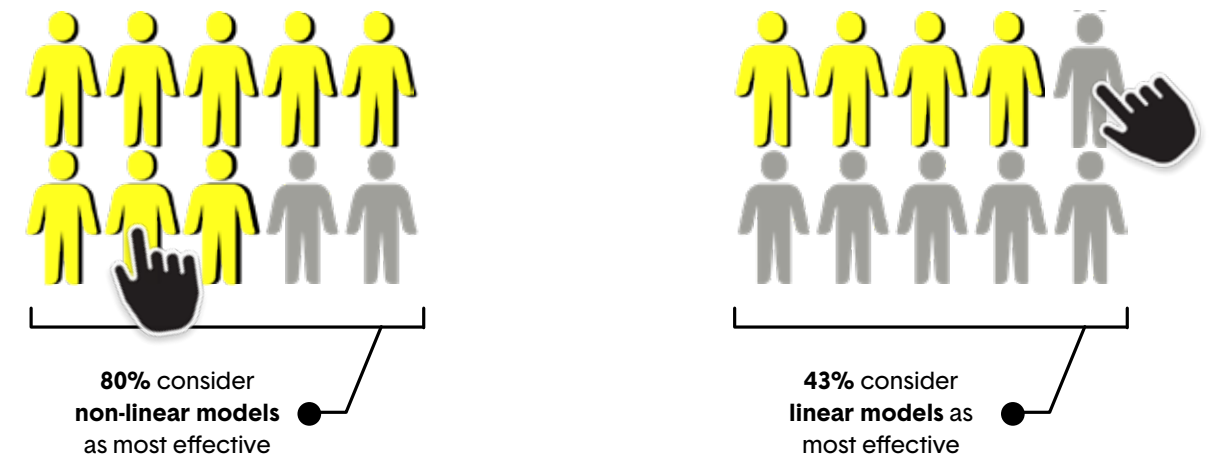
Linear models are quickly falling out of favor.

Tracking outcomes across the full funnel



Survey Question: What have been the main objectives for your campaigns? Select all that apply: reach, brand awareness, engagement, consideration, conversion, sales

Most effective approach to measuring consumer journeys



Model approaches selected by survey respondents:

Linear

- ✓ **A structured funnel model** (e.g. Awareness to Consideration to Purchase)

Non-linear

- ✓ **Behavioral Flow:** Optimizing campaigns in real time based on consumer behaviors
- ✓ **Flywheel:** Focusing on post-purchase engagement and advocacy to inform future campaigns
- ✓ **Micro-moments:** Measuring multiple touchpoints without a fixed path

*Total exceeds 100% as respondents could select multiple options.

Survey Question: Which of these approaches do you believe is most effective for measuring consumer journeys?

2:15



US marketers predict major changes to consumer media consumption over the next 12 months.

Marketers believe there is going to be a **22% increase in impulse shopping**

These expectations align with the shift toward behavior-led strategies. Forward-thinking marketers recognize the need for more dynamic measurement approaches that capture evolving customer journeys and identify deeper levels of engagement.

45% of marketers expect greater engagement with interactive content

42% anticipate more personalization

42% see more cautious and research-driven behavior

The tipping point

Marketers believe impulse shopping is on the rise in the US, but that is not to say consumers have not already done their research beforehand. While older generations tend to spend time ensuring they have all the facts before purchase, younger demographics natively expect this process to be integrated into their digital journey. Naturally, higher engagement through personalized and interactive experiences can and will lead to more impulse purchases.

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Industry commentary

This report shows that we are no longer looking at commerce media in isolation, but increasingly as an integrated component of the audience journey.

With the ubiquity of the shopper mindset, the funnel can no longer exist solely for commerce; **consumers now expect the option to purchase across the full spectrum of media they engage with.**

This shift reflects what many of us are already seeing play out in market.

Amie Owen
Global Chief Commerce Officer, KINESSO

What I see around the world is that commerce media is reshaping budgets with behavior-led strategies for marketers. The mantra for marketers interested in growth should be 'shoppable first, conversion everywhere and effortless to buy'.

The 'TikTokification' of the world of marketing communication should not be underestimated. We all love video. Yes, technical integration and measurement are hurdles, but they always were – and are always overcome.

Colin Lewis | Retail Media Works

Commerce media presents new opportunities for marketers, but it is vital to revise how they measure success.

Shoppable content is simply a functional upgrade that enables a definitive action – the purchase – but the real story is facilitating behavioural understanding before and after that moment. Ultimately, commerce media is about providing utility to the consumer so they can shop on their own terms: wherever, whenever, however they want.

Norm Johnston | SVP, Head of Global Advertising Strategy, NewsCorp

← After observing the broader landscape, it is time to look closely at **what is really influencing consumer outcomes.**

Changing behaviors have fueled the significant rise of commerce and retail media. While they might seem similar at first glance, there are distinct differences.

To help ground the findings that follow, here's how the survey defined each campaign type:

Comm•erce Cam•paigns (noun)

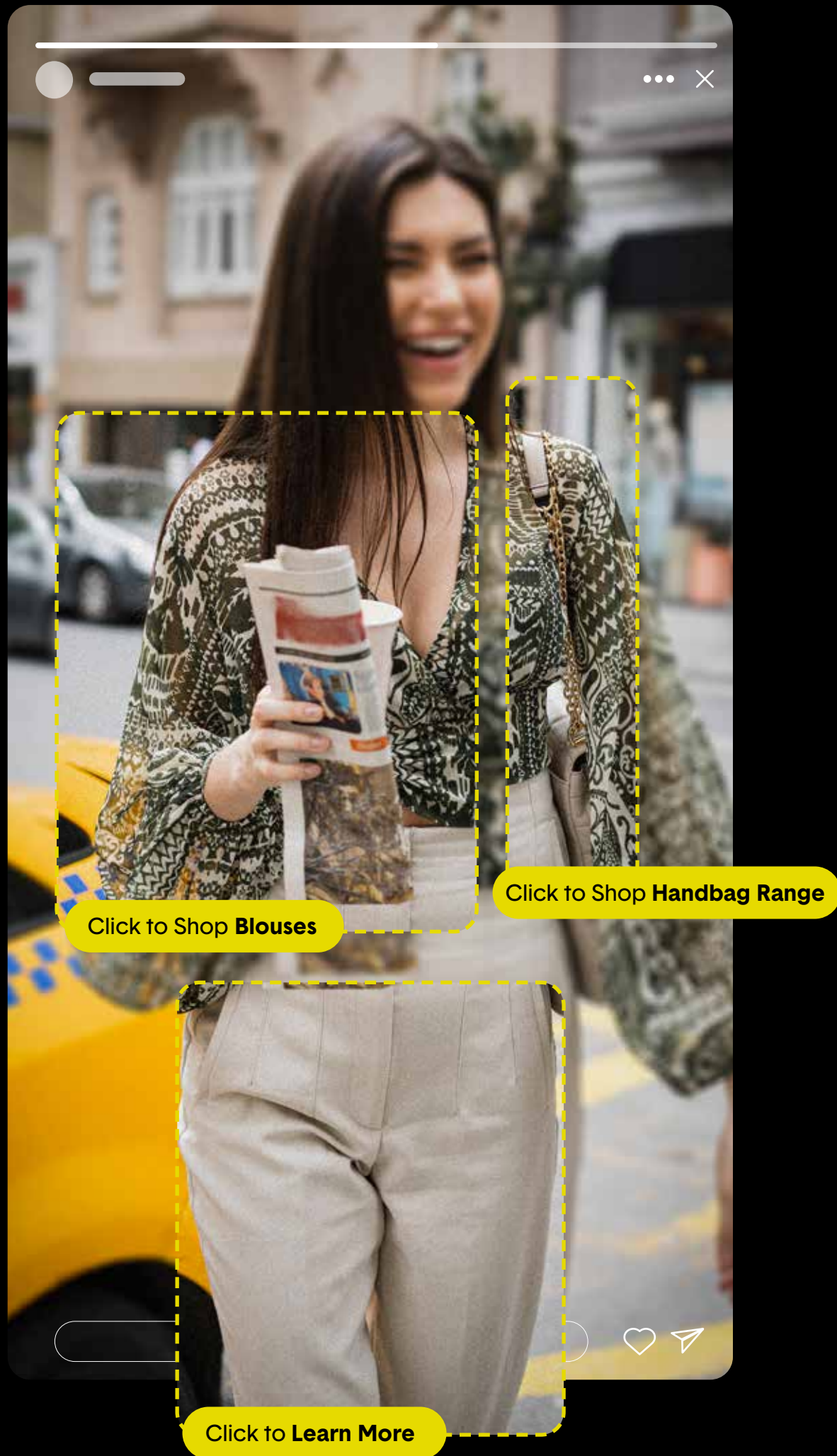
Campaigns that leverage commerce-enabled creative formats, such as shoppable ads, interactive ads and product carousels, across a variety of digital channels, including social media platforms (e.g., Facebook, Instagram), publisher websites, mobile applications, and emerging commerce platforms to prompt immediate transactional responses.

Re•tail Me•dia Cam•paigns (noun)

Campaigns that use digital advertising space within a retailer's or marketplace's owned environments (e.g. websites and apps) and apply first-party data for granular targeting both on-site (owned platforms) and off-site (external digital environments).

Oth•er Dig•i•tal Cam•paigns (noun)

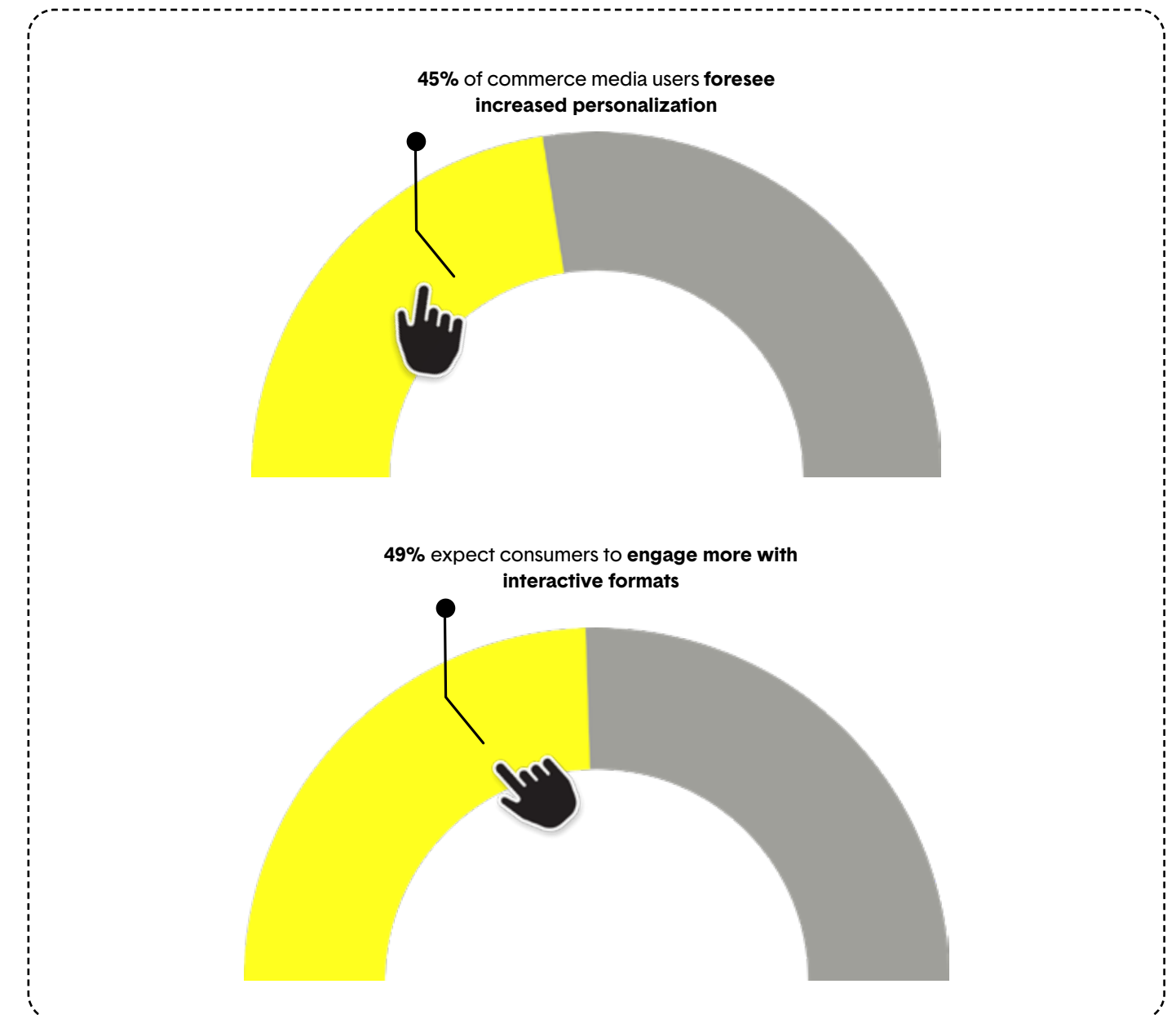
Any other online advertising, including general display, search, programmatic, and other digital formats aimed at brand awareness or performance marketing outcomes.



Commerce media continues rising

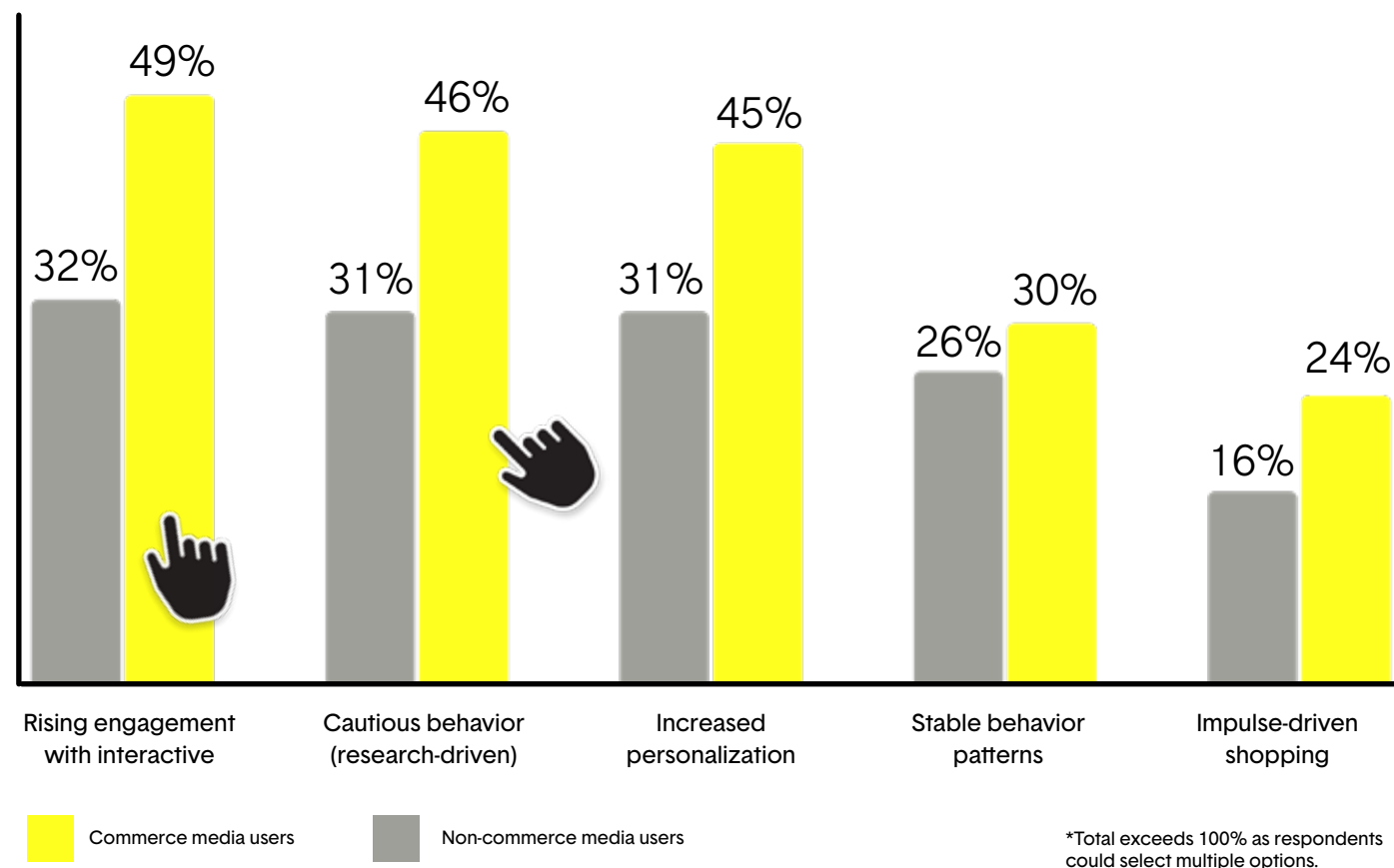
Commerce media now represents 31% of media spend on average

The once-experimental approach is now becoming a core component of marketing strategies. Progressive marketers using commerce media are preparing for a more responsive consumer, which is influencing their investment strategies and future planning. They are leaning into interactive and personalized formats to capture and retain consumers from the very first view.



Survey Question: How do you anticipate consumers' media consumption will evolve over the next 12 months? Results split by commerce media users.

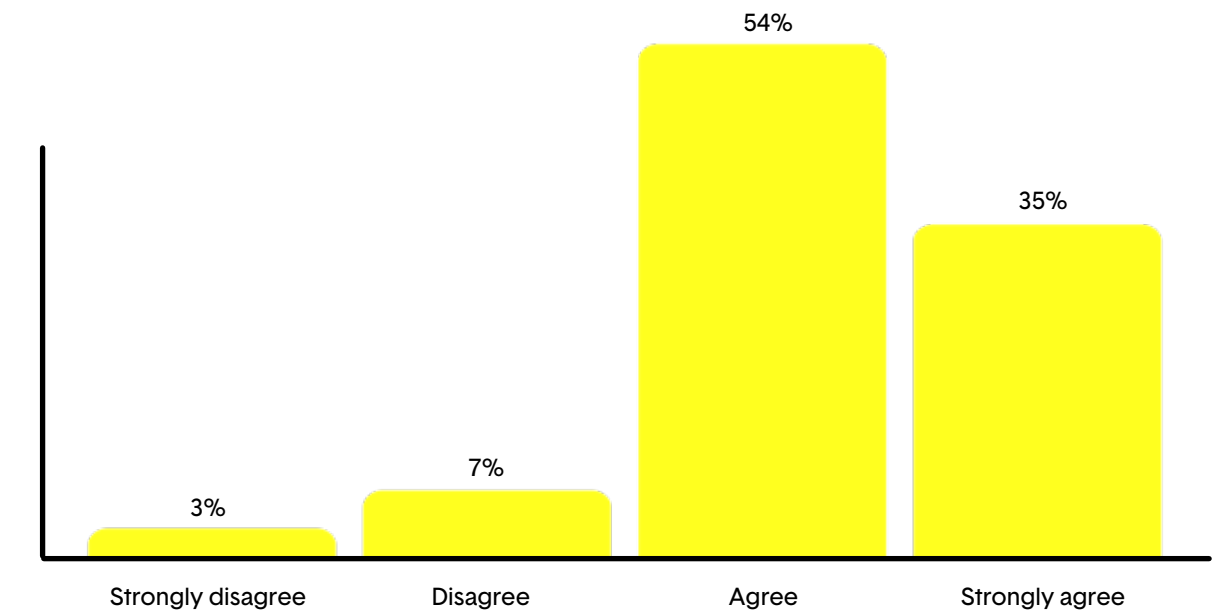
Commerce media users foresee **how media consumption will evolve over the next 12 months**



Survey Question: How do you anticipate consumers' media consumption will evolve over the next 12 months?

54% of marketers agree that shifting budgets to commerce media has **improved campaign results**

Progressive marketers' views on whether **shifting budget to commerce media has improved campaign results**

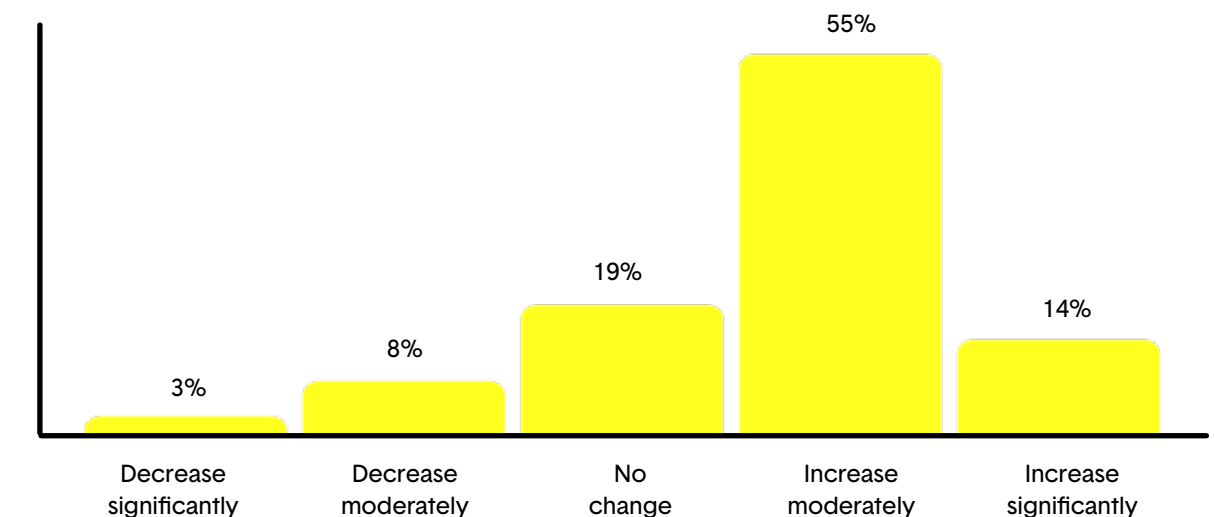


*Chart does not total to 100% due to rounding calculations.

Survey Question: To what extent do you agree that shifting budgets from traditional channels to commerce media has contributed to improved campaign results?

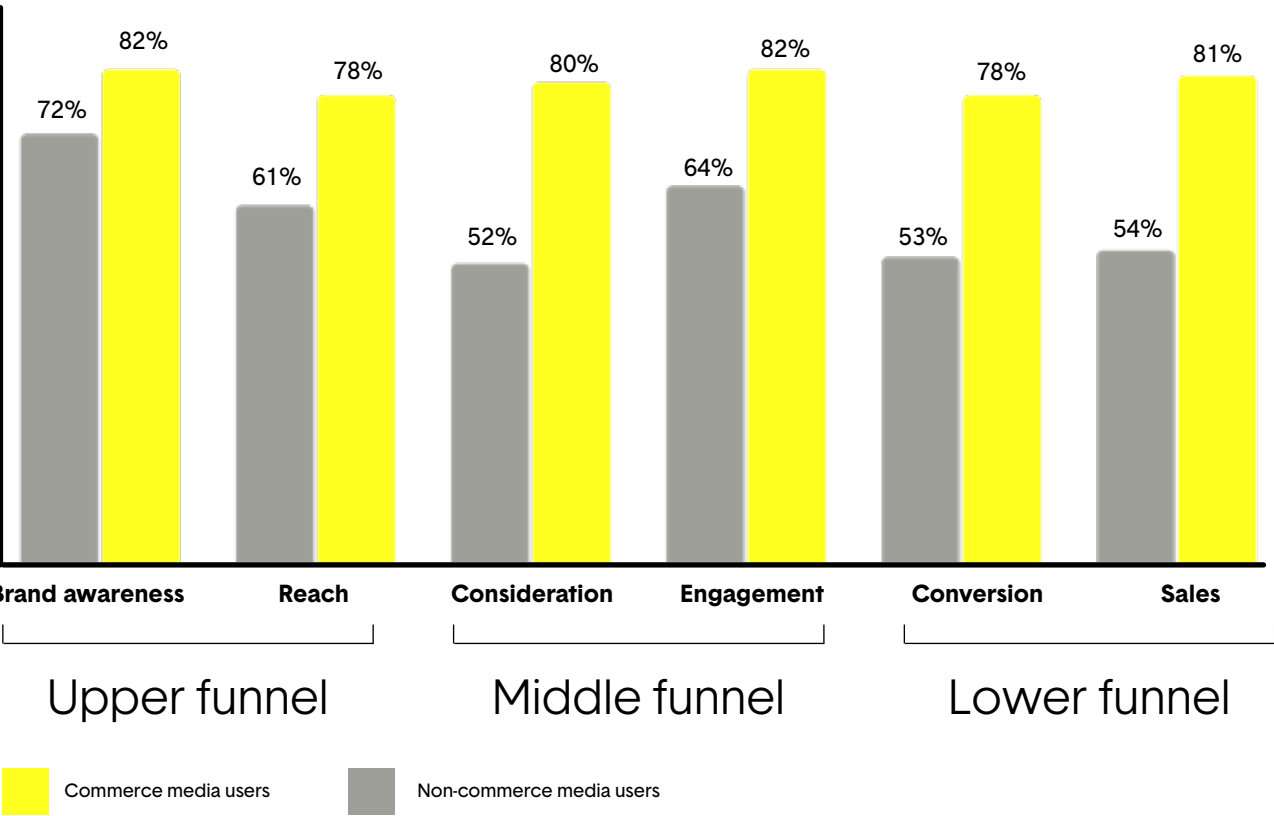
Budget allocation changes in commerce media over the next 12 months

Total falls below 100% due to exclusion of 'unsure' responses.



Survey Question: How do you feel your budget allocation will change over the next 12 months?

Satisfaction of funnel outcomes
using commerce media



Survey Question: For your selected objectives, how satisfied are you with your current measurement approach?

Commerce media users report higher satisfaction levels across every stage of the funnel compared to non-users.

Commerce media appears to deliver more consistent outcomes throughout the customer journey, particularly with mid- and lower-funnel measurements. Forward-thinking marketers recognize its potential as an effective full-funnel solution.

- The top 3 challenges**
commerce media users face are:
- 1. Team coordination
 - 2. Technical integration issues
 - 3. Unclear performance metrics



Shoppable ads and new growth opportunities

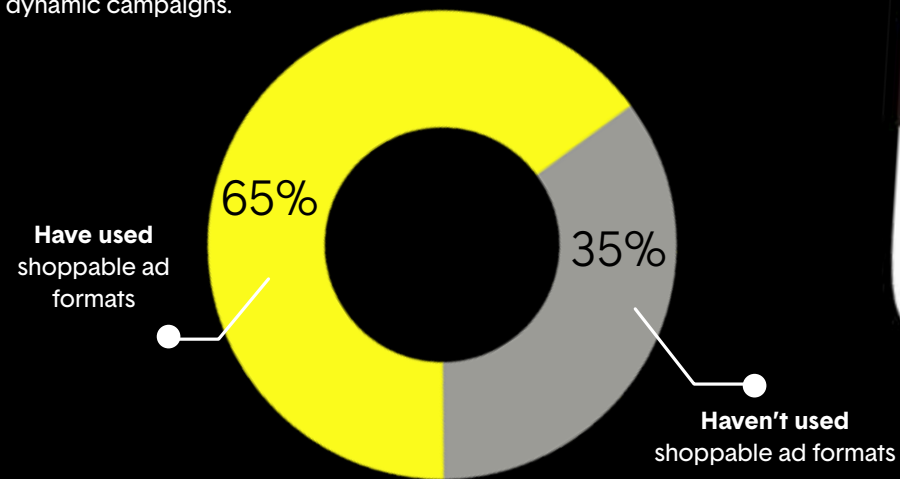
Shoppable ad users demonstrate a proactive, agile mindset, rapidly adjusting budgets in response to emerging trends.

This signals growing confidence in shoppable formats as a way to satisfy evolving consumer expectations and maximize growth.

Social media and standard video ads are the #1 creative formats used by advanced marketers

65% of US marketers are experimenting with **shoppable ad formats**

Interactive and shoppable ads are emerging as new opportunities for success, which nearly two-thirds of marketers are using for dynamic campaigns.

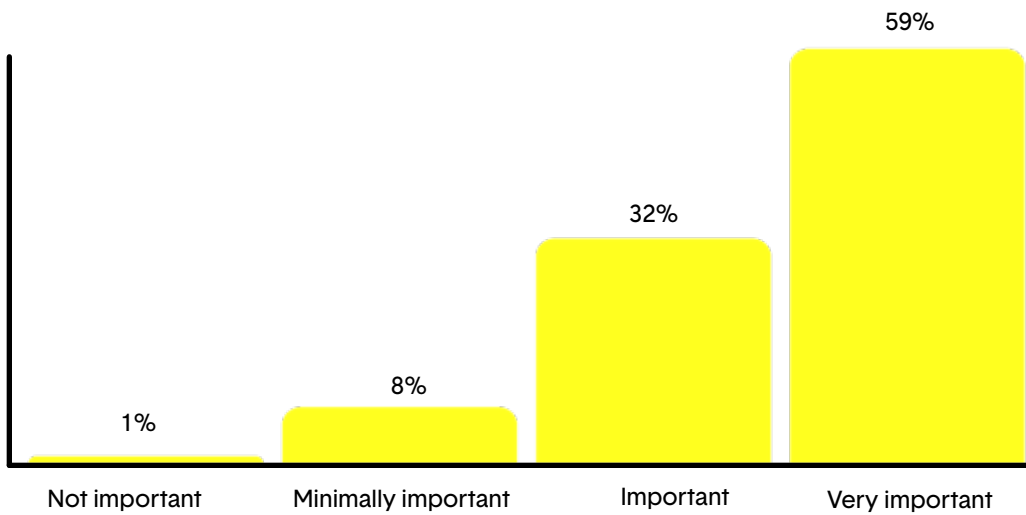


*Results split by respondents who did and did not select shoppable ads

Survey Question: Which of the following creative formats do you currently use in your campaigns?



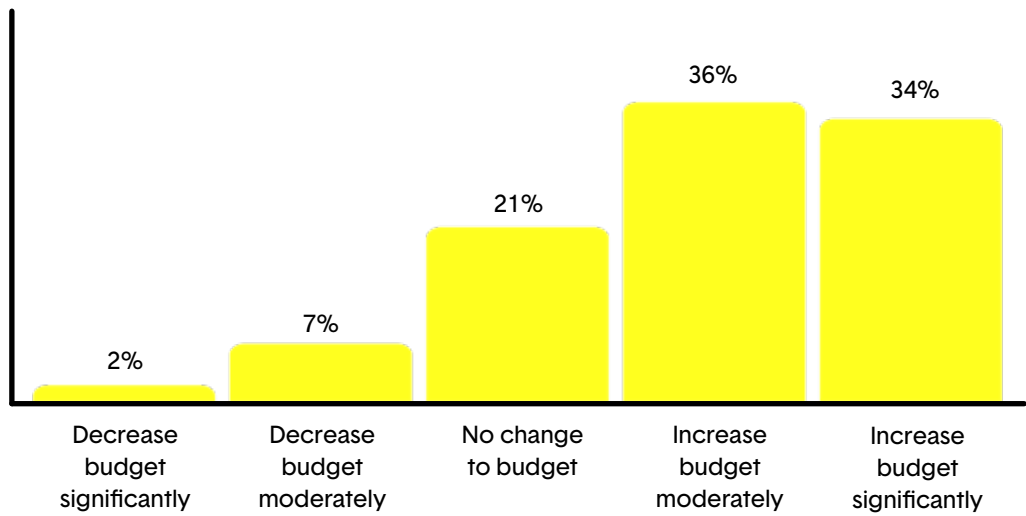
91% of shoppable ad users agree that **adjusting budgets based on emerging trends is either important or very important**



*Results split by respondents who use shoppable ads.

Survey Question: How important is it for your organization to adjust budget allocation based on emerging trends and growth opportunities?

70% of those experimenting with shoppable ads expect to **increase their digital budgets over the next 12 months**



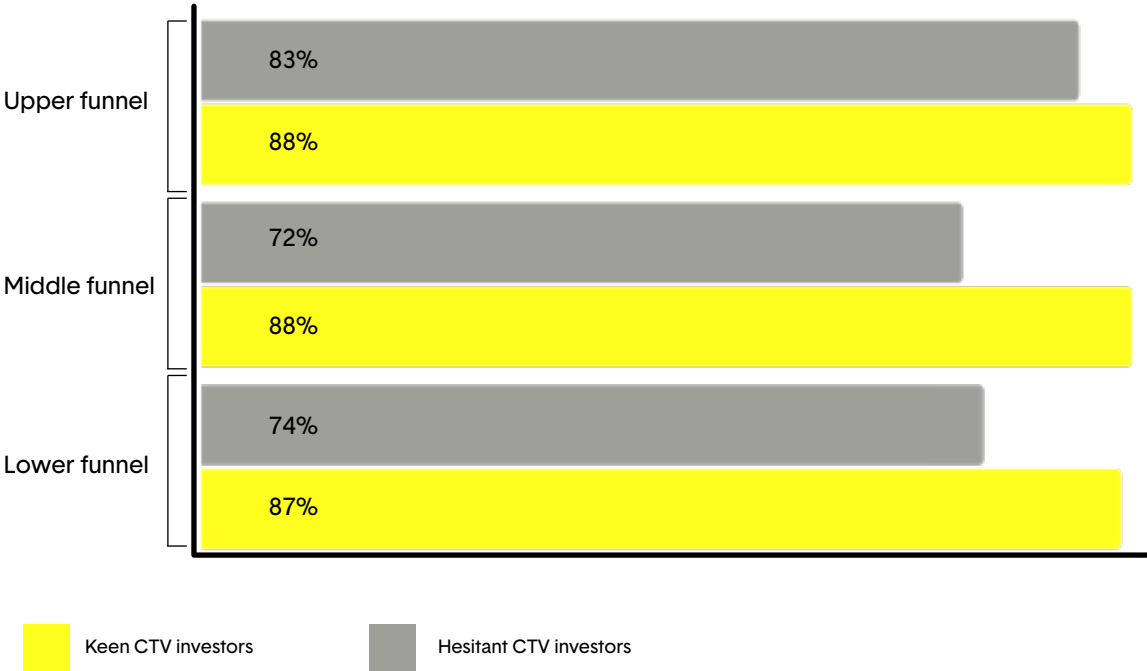
*Results split by respondents who use shoppable ads.

Survey Question: How do you feel your budget allocation will change over the next 12 months?

The promising future of CTV

Forward-thinking marketers recognize **Connected TV (CTV) as an opportunity to go beyond upper funnel awareness**

CTV is quickly becoming more than just a top-of-funnel channel in the US, with 88% and 87% of CTV investors recognizing its value for mid- and lower-funnel marketing compared to hesitant CTV investors.



*Responses split by CTV attitude. Total exceeds 100% as respondents could select multiple options.

Survey Question: For your selected objectives, how satisfied are you with your current measurement approach?

56% of marketers prefer **interactive video ads**

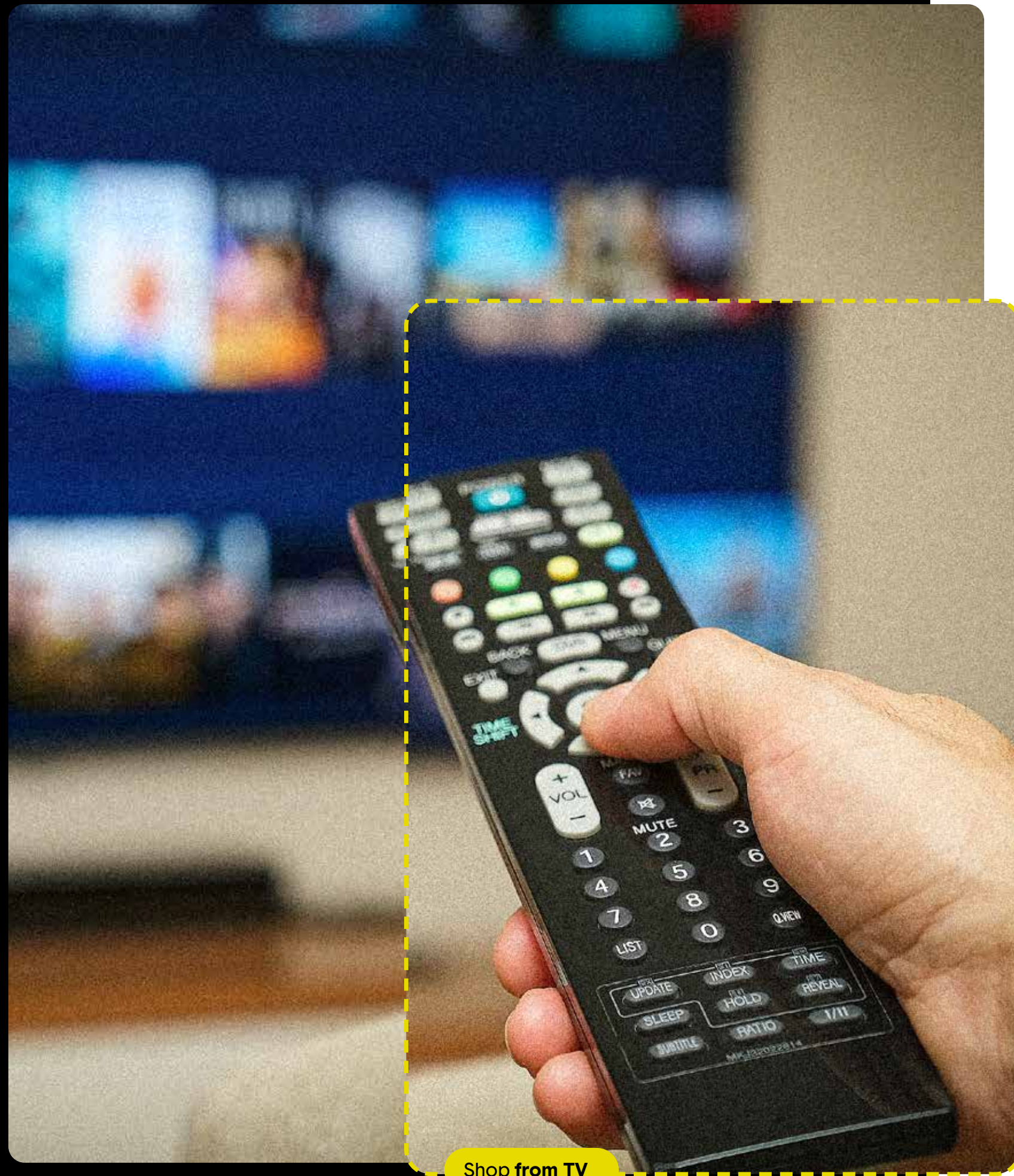
74% prefer **shoppable ads with in-video checkout**

57% prefer **click out to buy shoppable formats**

TV add-to-cart

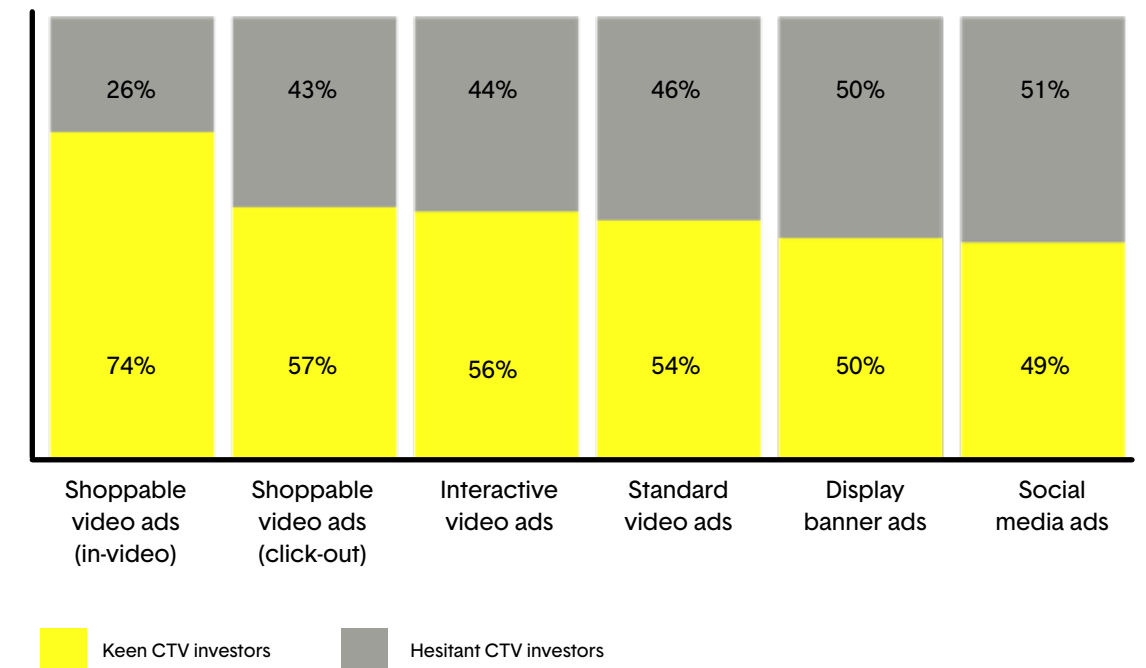
While television commercials have long been a passive format, the modern consumer is ready and willing to engage with a more active medium if it is a relevant experience.

Consumers want more from the media they read, watch, and listen to; progressive marketers are on the same page and are seeking opportunities for interactivity and transactional pathways to intersect.



Shop from TV

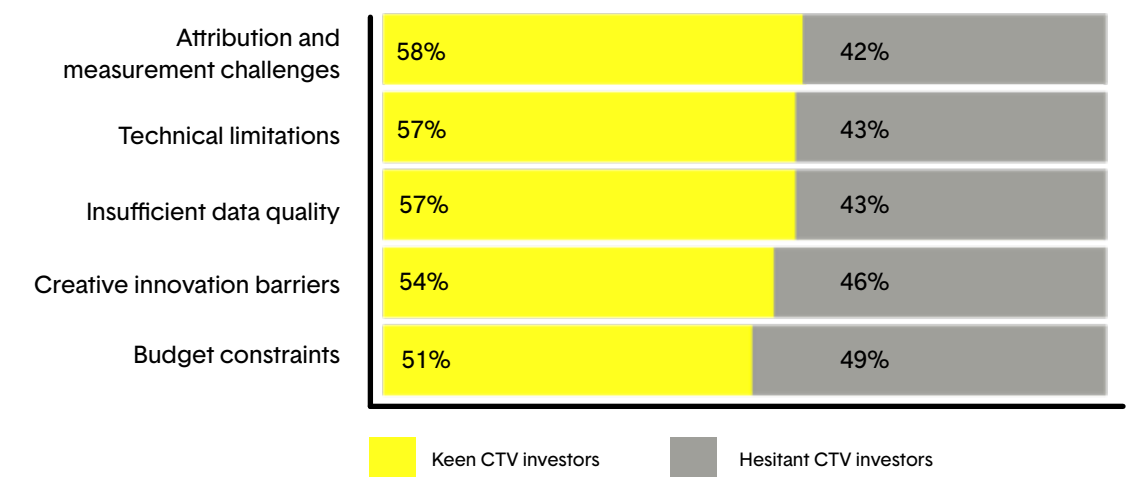
Shoppable ads are the most preferred formats among CTV marketers



*Responses split by CTV attitude. Total exceeds 100% as respondents could select multiple options.

Survey Question: Which of the following creative formats do you currently use in your campaigns?

Measurement challenges and technical limitations currently hold back the full potential of CTV implementation



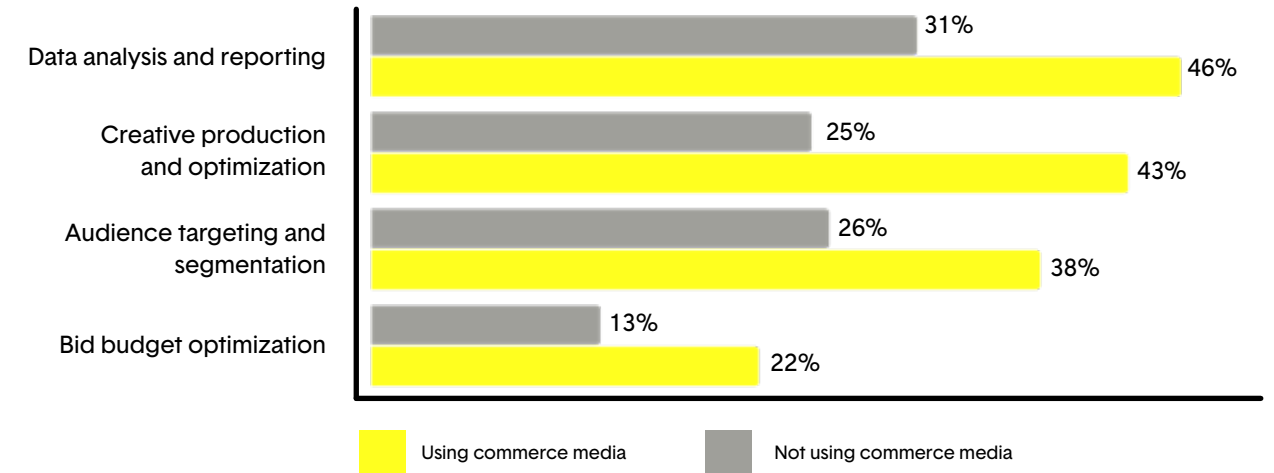
*Responses split by CTV attitude. Total exceeds 100% as respondents could select multiple options.

Survey Question: What challenges do you encounter when optimizing media placements and creative execution?

AI: an emerging ally

43% of marketers agree that **AI can support data analysis and reporting**

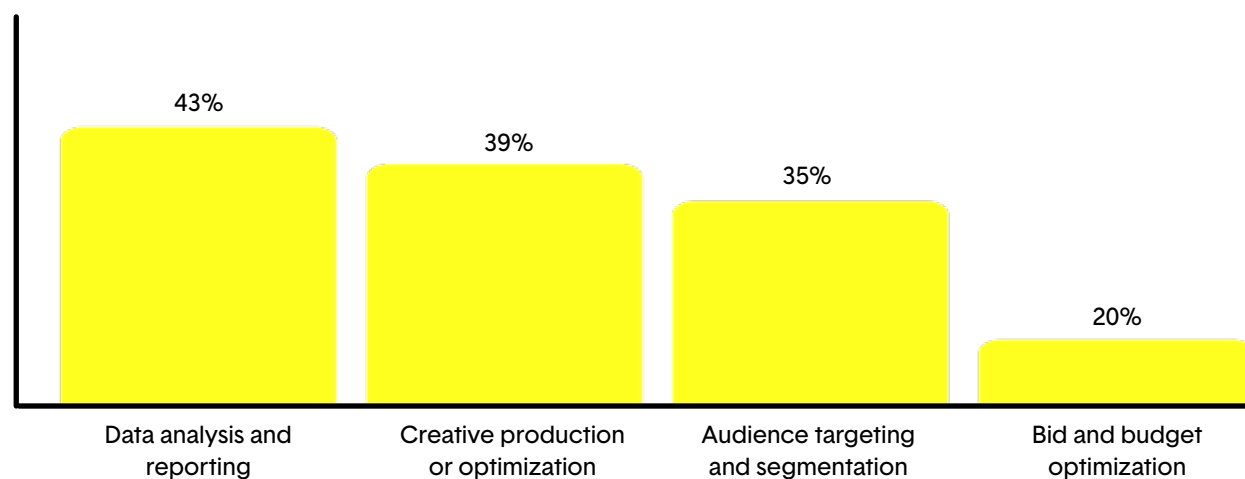
AI greatly benefits commerce media users compared to non-users – **particularly for decision making and creative performance**



*Responses split by commerce media users. Total exceeds 100% as respondents could select multiple options.

Survey Question: What aspects of your campaign have benefited most from AI driven automation?

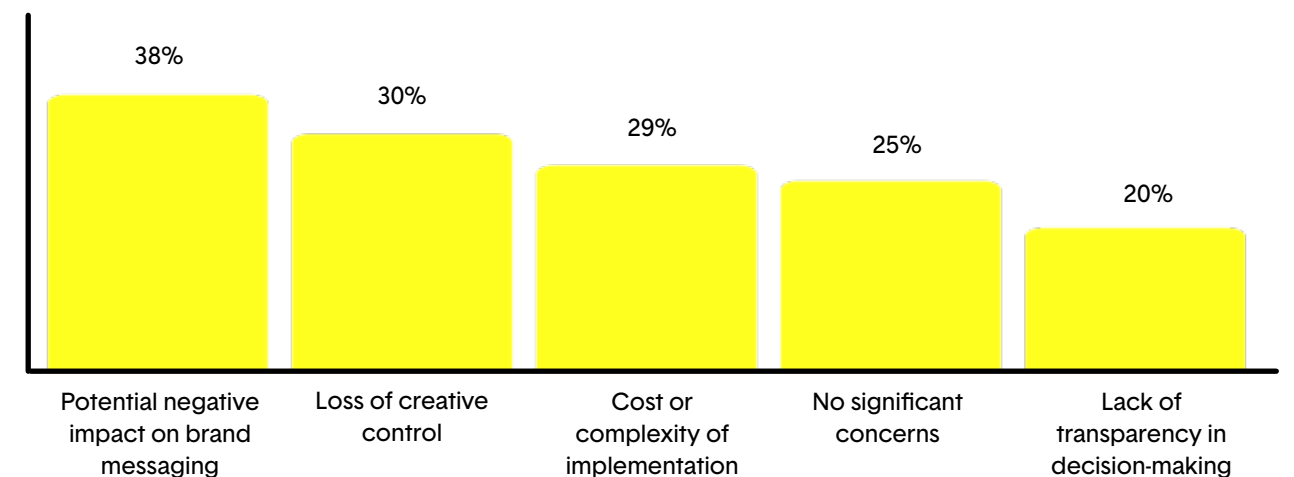
Marketers see strong potential in AI to **improve data insights, enhance creative production, and sharpen audience targeting**



*Total exceeds 100% as respondents could select multiple options.

Survey Question: What aspects of your campaign have benefited most from AI driven automation?

Brand safety, creative control, and implementation complexity are common concerns marketers share about using AI



*Total exceeds 100% as respondents could select multiple options.

Survey Question: What concern, if any, do you have about using AI in your marketing campaigns?



Conclusion

Brands, marketers, and agencies ahead of the competition are claiming new ground and consumers in the US and abroad using commerce media. This is a new and significant opportunity – not risk – to challenge established operating models and break the ever-present tension between achieving marketing growth and adapting to evolving consumer behaviors.

That said, the old methods still hold value: these tried and true fundamentals are the foundation of the potential contained within commerce media and the emerging technologies that support it. The difference now is that the skill to generate granular insights and incremental outcomes makes a greater difference than simply having the biggest budget.

At its core, marketing is simply about understanding the right people to reach and the best ways to reach them. As the research shows, open-minded marketers quickly adopting commerce media are already seeing success. Those still playing catch up risk falling further behind in a market defined by agility, relevance and measurable impact.

If consumers have changed and are not going back, then so must the ways of reaching them. The sooner commerce media strategies are implemented and improved, the bigger the advantage – all in the pursuit of meeting the consumer where they are.

Research methodology

Objective: Designed to test assumptions around commerce media adoption, shoppable formats, and marketing challenges.

Sample: 303 US marketers, selected for relevant digital experience. Conducted through a 10-minute online panel survey between April 2–15, 2025.

LongTerm CoLab is a specialist digital market insights company that equips senior leaders at major media businesses with deep, actionable insights into current and emerging market trends. A unique blend of proprietary data and tailored research programmes provides an unrivalled 360° view of the digital media ecosystem, integrating seller, buyer, and consumer perspectives.

Vudoo transforms traditional advertising into a commerce engine, enabling consumers to engage, shop, and transact directly within video, display, and CTV ads. The solution dynamically optimises creatives and targeting to maximise impact, delivering higher engagement, conversions, and measurable outcomes. Every interaction is captured as first-party data, giving brands full-funnel visibility into consumer intent.