

JUNE 2025

DEMYSTIFYING CREATIVE INTELLIGENCE



ENHANCING MARKETING EFFECTIVENESS AT THE
INTERSECTION OF MEDIA, AUDIENCE AND CREATIVE



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ABOUT THE PAPER

This research's purpose is to provide insight into the rapidly evolving marketing intelligence ecosystem and the role of creative intelligence in driving marketing effectiveness.

This paper attempts to frame the opportunity for amplifying media and audience capability with a specific focus on the trends and dynamics shaping the state of creative data and analytics, its impact on the marketing funnel, use cases and challenges in the current state and the future outlook for the market.

In the process of developing this paper, Winterberry Group surveyed over 200 senior brand marketing and agencies executives, data, analytics and technology thought leaders across the US and UK, conducting in-depth interviews with over 50 industry experts and influencers from customers and user of creative intelligence solutions.

The result is an evidence-based examination of the current state and emerging trends within creative intelligence.

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EXECUTIVE SUMMARY

Global media spend on advertising is expected to reach **\$1.12 trillion** by 2026. Creative and content investments are keeping pace—projected to exceed **\$140 billion**, growing at a **10% CAGR** since 2023. But this growth brings with it a new operational reality: more than **5 trillion creative assets** are now being produced annually, not including the estimated **40-50% of assets** that are never activated in media.

This content explosion reflects a fundamental shift. While the industry has historically prioritized optimization of media and the development of robust audience data, **creative—the element that drives up to 40-70% of campaign performance—has been largely undervalued and undermeasured**. The recent acceleration of AI adoption, the maturity of audience data infrastructure, and faster feedback loops between exposure and performance are finally turning attention to this long-overlooked lever of effectiveness.

Yet confusion persists. Nearly half of marketers surveyed still equate **Creative Intelligence** with ideation or conceptualizing, rather than recognizing it as a system for measurement and optimization.

To close this gap, **Creative Intelligence should be defined as:**

CREATIVE INTELLIGENCE

The ability to collect, structure, and analyze creative decisions against performance data (brand, media, sales) and apply insights—contextualized by audience and media—to continuously optimize assets for effectiveness and engagement

WHY IT MATTERS NOW

Advances in AI, creative platforms, and measurement tools are making it possible to track and evaluate creative at a level of precision that was previously out of reach. These capabilities enable marketers to answer questions such as:

- What assets ran, in which formats, and across which channels?
- How often were assets reused or adapted?
- What creative elements (imagery, pacing, copy, tone) drove engagement?
- What was the production cost and time-to-market?
- When did an asset begin to fatigue, and how was performance affected?
- How did emotional tone or message structure influence outcome?

Together, these inputs are forming a **new creative performance framework**—one that connects asset-level data to brand outcomes, performance KPIs, and ultimately, sales impact. This allows marketers to better calculate **true ROAS and ROMI**, inclusive of both “working” and “non-working” media investments.

“Creative effectiveness should be tracked like a stock portfolio—evaluating impact over time, not just snapshots.”

*- Chief Strategy Officer,
Global Agency Network*

WHAT'S DRIVING ADOPTION

Winterberry Group expects accelerated adoption over the next 24-36 months, as leading brands move from pilots to scaled rollout. The primary forces behind this shift include:

1. Asset Volume & Complexity

The exponential growth of creative versions, channels, and formats is overwhelming existing processes. Marketers are being asked to do more with the same—or fewer—resources.

2. AI & LLM Integration

With the rise of generative AI and large language models, creative development is becoming faster and more adaptive. But without structured data and governance, scale alone can introduce risk.

3. Audience Data Layer Maturity, Creative Data Availability

As CDPs, ID graphs, and consent infrastructure mature, organizations are increasingly ready to link creative data and performance to individual or segment-level engagement.

4. The Intelligent Studio Model

Brands are rethinking in-house and external studio models, integrating AI tools, performance data, and collaborative workflows to reduce time-to-brief, improve accuracy, and align creative with business goals.



FROM TEST TO SCALE: WHAT TO EXPECT

While many organizations are still in test-and-learn mode, **leaders are moving quickly toward operationalizing Creative Intelligence**. Adoption is expected to start with **channels where creative data is most accessible**—including social (via API access), email and mobile messaging (consented environments), and then expand into programmatic digital formats such as display, video, audio, and CTV.

The development of a **consistent measurement framework**, powered by in-channel analytics, cross-channel tracking, and **data-driven commercial mix modeling**, will be essential to proving full-funnel effectiveness.

LONG-TERM OUTLOOK: A LIVING CREATIVE SYSTEM

Over time, the outcome of Creative Intelligence adoption will be the emergence of a living, omnichannel creative system—where:

- Each creative asset and the components that are designed and assembled to create it – images, text, video etc. can be versioned, measured, and optimized continuously
- Creative and audience data are unified across the enterprise
- AI augments creative strategy, not replaces it
- Organizational design evolves to support closed-loop processes between insight, production, media, and measurement

"It is time to eliminate the artificial divide between working media and non-working creative. Now is the time to work more effectively"

- Summary takeaway

The foundation is now being laid. Brands that invest in Creative Intelligence today will be best positioned to unlock the full value of personalization, efficiency, and measurable growth tomorrow.



SECTION I

CREATIVE INTELLIGENCE: MARKETING'S UNDERLEVERAGED GROWTH DRIVER

Global advertising spend is projected to reach **\$1.12 trillion** by 2026. Matching that trajectory, investment in creative and content is expected to surpass **\$140 billion**, growing at a 10% CAGR since 2023.

At first glance, this growth appears healthy. But a deeper look reveals an imbalance: the number of creative assets generated to support—and as a consequence of—this spend now exceeds **5 trillion**. That figure doesn't even account for the estimated **40–50% of assets created but never activated**. This unprecedented scale is only possible because AI is enabling brands and their partners to convert ideas into creative outputs for activation across channels and formats—at speeds and volumes never before possible.

THE EVOLUTION OF MARKETING INTELLIGENCE

Over the past three decades, marketers have focused primarily on tracking and targeting consumers through media.

- **Phase I** was media-centric: aligning spend to where and how content was delivered—TV, print, digital, and eventually omnichannel formats.
- **Phase II** focused on data and audience intelligence: leveraging digital platforms and identity resolution to sharpen targeting and measurement.

While these phases led to greater efficiency and engagement, too many opportunities to deliver meaningful ad experiences were still being missed. That's because one critical pillar was left behind.

THE MISSING PIECE: CREATIVE

The third foundational element—**creative**—has long been treated as separate from performance strategy. Labeled “non-working

media,” creative was deprioritized across brand and agency ecosystems. During this period, significant advancements were made in media measurement and audience targeting, including the application of artificial intelligence (AI) to optimize audience selection. But the same progress was not applied to understanding and optimizing creative performance.

Today, that's changing. We are now entering a new age: the era of **Creative Intelligence**.

WHAT CREATIVE INTELLIGENCE IS—AND ISN'T

Creative Intelligence isn't about creativity in the traditional sense. It doesn't refer to ideation, storyboarding, or asset production, nor to the tools used to generate copy or imagery—though those technologies continue to evolve rapidly. Similarly, while creative tagging and auditing are related processes, they are not components of Creative Intelligence itself. Rather, CI data can serve as an input into governance, informing those activities without being part of them.

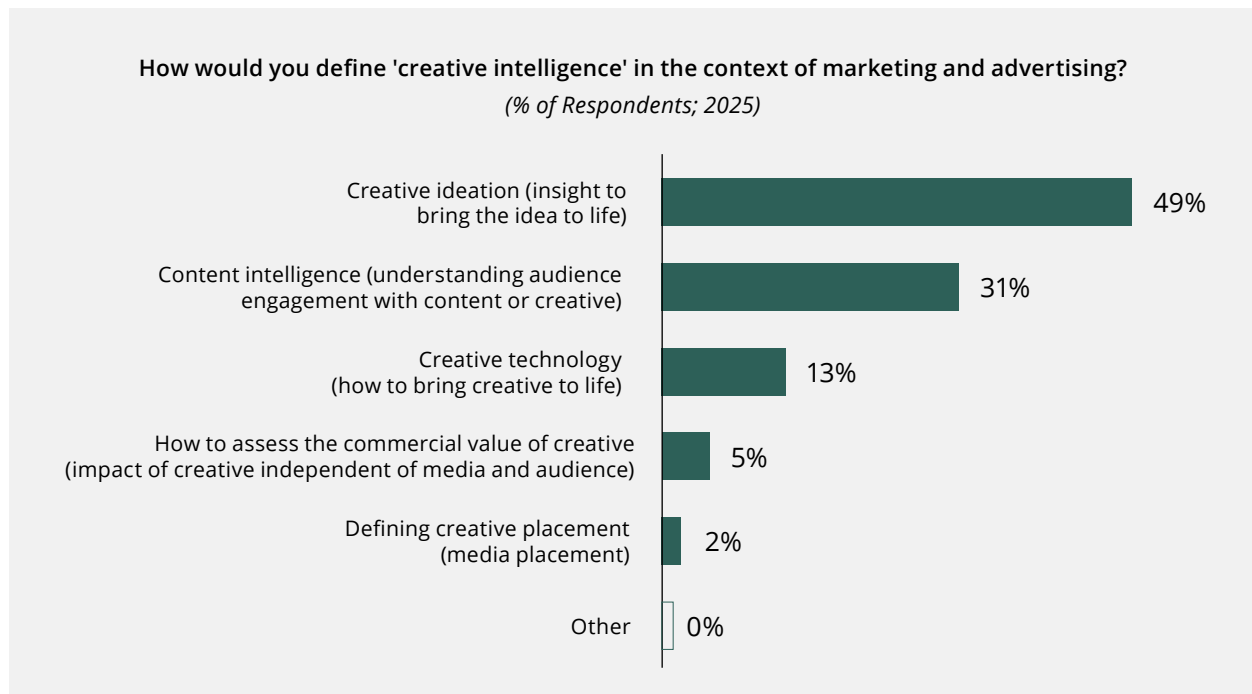
Yet clearly the market conflates how we concept and ideate with how we leverage feedback from the use of creative assets.

“[Creative Intelligence is] the power of this intangible, nebulous thing that we all call creativity to drive performance in some capacity. You have so many levels you can pull as a marketer, some are harder, some are softer, and creativity sits in the softer space and can be undervalued quite easily or it's difficult to define and tap into.”

*– Head of Advisory,
NA at Global Creative Effectiveness Organization*



FIGURE 1 – NEARLY HALF OF RESPONDENTS EQUATE CREATIVE INTELLIGENCE WITH THE IDEATION PROCESS, NOT EXECUTION OR MEASUREMENT



Source: Winterberry Group Survey N=207 (2025)

Instead, **Creative Intelligence refers to the ability to collect, structure and analyze creative decisions against performance data**, combining it with audience and media context to continuously optimize asset deployment. In other words, it's about using data to ensure the right creative reaches the right audience in the right context—and performs

Creative effectiveness accounts for **40% to 70% of advertising impact**, depending on channel and campaign. Yet, it remains the least measured and least optimized lever in most marketing organizations.

WHY NOW?

Several factors are accelerating the shift toward creative intelligence:

- **AI and automation** are enabling real-time analysis and versioning of creative content.
- **Feedback loops are faster**, enabling marketers to connect exposure with outcomes in near real-time.
- **Budgets are under pressure**, prompting marketers to do more with less—and extract greater value from existing creative assets.
- **Consumer engagement is becoming increasingly fragmented**, with attention metrics indicating reduced time spent per asset—a trend driven by the proliferation of channels and competing content demands.

Behind the scenes, leading brands and agencies have begun piloting creative intelligence tools, testing how data-driven insights into asset performance can drive faster optimization

and deeper engagement. But adoption is uneven, and the market still lacks a consistent definition of what Creative Intelligence means or how to operationalize it.

REDEFINING THE INTELLIGENCE STACK

To unlock the full potential of modern marketing, all three pillars of intelligence must work in concert:

- **Media Intelligence** – Understanding where, when, and how creative is delivered and consumed by an audience
- **Audience Intelligence** – Understanding who the message is for (a person or segment) and applying data from their behaviors, preferences and motivations for insights, targeting, activation and optimization
- **Creative Intelligence** – Understanding why consumers engage. CI is the ability to collect, structure, and analyze creative decisions against performance data (brand, media, sales) and apply insights —contextualized by audience and media—to continuously optimize assets for effectiveness and engagement.

THE ROAD AHEAD

As the industry embraces Creative Intelligence, the opportunity is not just to optimize performance—it's to close a long-standing gap in marketing effectiveness. But doing so requires clear definitions, cross-functional collaboration, and a shift in how we value and manage creative assets—not as isolated executions, but as performance drivers.

The future of marketing belongs to those who can bring together **media, audience, and creative**—not as separate workstreams, but as a unified, intelligent system.

MARKETING'S NEXT CHAPTER: OPERATIONALIZING CREATIVE INTELLIGENCE

This research explores a pivotal shift in the evolution of marketing—one where **personalization at scale and speed is no longer a future goal, but an increasingly attainable reality**. We are entering the era of Creative Intelligence, defined by the ability to unify structured and unstructured data across creative, media, and audience systems. This shift enables marketers to move from fragmented execution to **cohesive, data-driven orchestration**—delivering more relevant, effective marketing at scale.

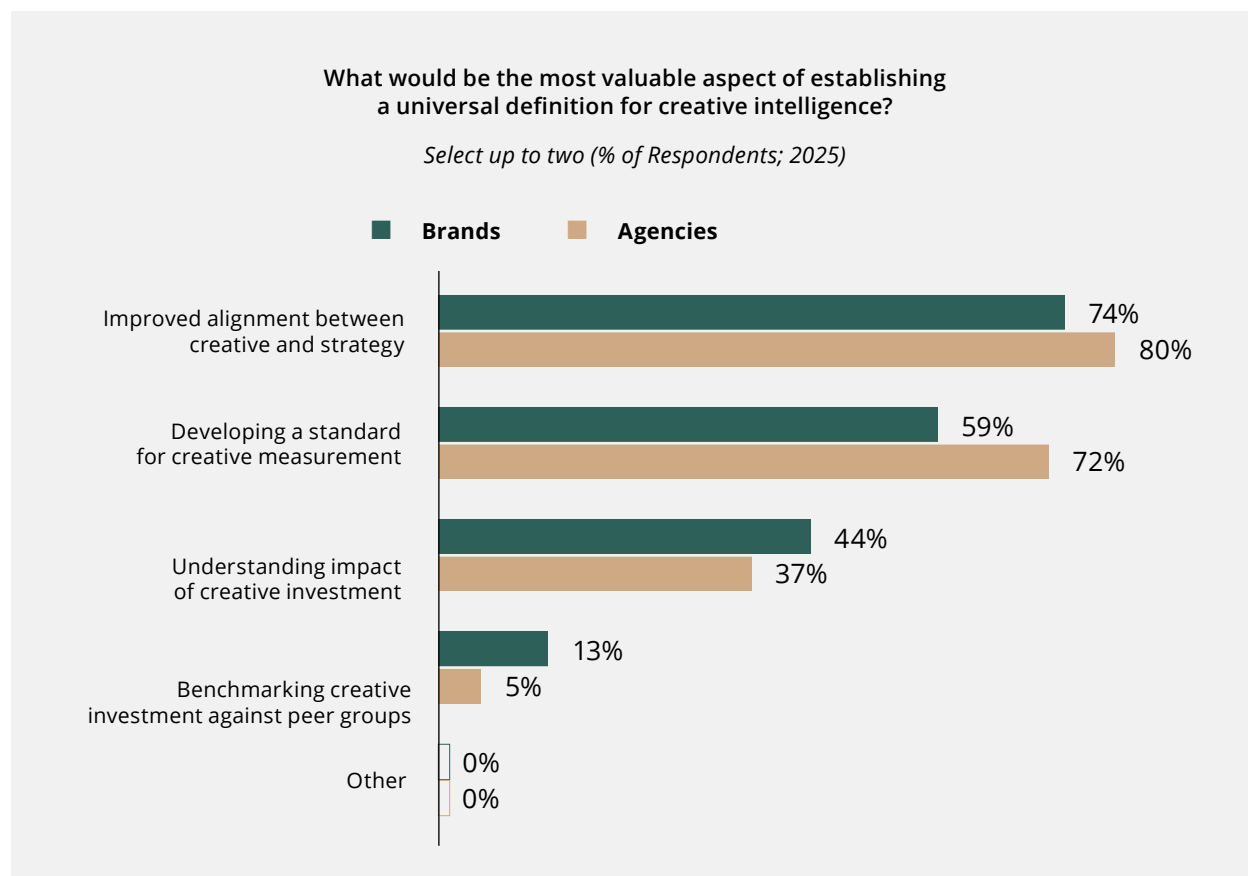
What makes this transition especially important isn't just the technology—it's the **organizational alignment** it demands.

Insights from our brand and agency survey, paired with executive interviews, point to a critical challenge: the persistent disconnect between **marketing strategy and creative execution**. Creative Intelligence offers a path to close that gap by establishing common standards and shared data frameworks that define and measure the value of creative. In doing so, it enables better collaboration, accountability, and decision-making across marketing teams.

In short, Creative Intelligence is not just a technical evolution. It's a necessary step toward more aligned, effective, and scalable marketing.



FIGURE 2 – BOTH BRANDS AND AGENCIES PRIORITIZE ALIGNMENT AND MEASUREMENT, BUT AGENCIES PLACE SLIGHTLY GREATER EMPHASIS ON BOTH



Source: Winterberry Group Survey N=207 (2025)

SECTION II

THE EVOLUTION OF CREATIVE INTELLIGENCE SOLUTIONS

THE HISTORICAL DIVIDE: MEDIA AND CREATIVE

One of the most consequential shifts in the history of modern marketing was the **partitioning of media and creative functions** from the 1990s—a division that shaped how campaigns were developed, funded, and executed.

This split accelerated and incentivized the now-common distinction between “**working**” media (paid distribution) and “**non-working**” creative (asset development). What began as a budgeting convention evolved into a broader structural divide—within both brands and their agency ecosystems. Over time, creative and media became **separate disciplines** with distinct technology stacks, workflows, KPIs, and ultimately, disconnected strategic goals.

While this arrangement was serviceable in an era dominated by broadcast, print, and out-of-home (OOH) channels, it also laid the groundwork for the fragmentation of media. Creative development was typically centralized within production teams, with assets stored in **Digital Asset Management (DAM)** platforms and manually circulated across teams and vendors. Campaign execution involved labor-intensive handoffs—large video and print files transferred to media systems via email or file share. As **Marketing Resource Management (MRM)** platforms emerged, some workflow efficiencies improved—but media insights, planning, and measurement remained siloed, often tracked in static spreadsheets and PowerPoint decks.

PHASE ONE: THE EARLY DIGITAL ERA

The rise of digital channels marked the **first attempt to reconnect creative with media and audience strategy**. Email marketing led the way, adapting techniques from variable data printing to support the dynamic assembly of content based on simple rules (e.g., location, behavior, or preferences). Creative became **modular**—assembled at send time via conditional logic and linked to performance metrics like open and click-through rates.

As programmatic display and paid social gained traction, **Dynamic Creative Optimization (DCO)** allowed for limited personalization across display formats. However, creative versioning remained expensive, and most deployments relied on templated structures.

Meanwhile, the **audience intelligence stack** matured rapidly. Marketers embraced identity resolution and third-party datasets to refine segmentation and targeting. This enabled personalized delivery to narrower audiences—often at the browser or household level—and measurable performance gains across online and offline outcomes.

Yet despite tighter alignment between media and data, creative still lagged. Assets were developed in silos and bolted onto campaigns late in the process, limiting the degree of personalization possible. Though AI and automation began to support versioning, these tools were used primarily in **engagement marketing**—especially email—rather than in the broader paid media ecosystem. DAM platforms remained the main linkage between creative and media systems, and the full promise of data-driven marketing was constrained by a **creative bottleneck**.

PHASE TWO: TOWARD UNIFIED INTELLIGENCE

We are now entering a new phase—defined by the convergence of media, audience, and creative intelligence.

Advancements in AI, especially **generative models and LLMs**, are transforming how creative assets are produced, versioned, and optimized. What used to require weeks of manual production can now be accomplished in hours, with creative systems drawing on **1st-, 2nd-, and 3rd-party data**, market research, and real-time performance signals.

But this is more than just faster production. Today’s leading-edge platforms deconstruct creative content into **discrete data components**—such as imagery, copy, structure, and tone—and use those signals to generate new, optimized assets at scale. These assets are not only personalized by audience and channel, but also dynamically adjusted based on performance.

Unlike previous approaches, which were primarily **reactive**, today’s systems can leverage **predictive analytics**. Impression-level engagement data feeds back into the system, helping identify what works for which audiences, when, and why. These insights enable marketers to continuously test, iterate, and improve creative performance in real-time.

“Creative Intelligence is a capability, not a campaign tool. It’s about building a sustainable system to measure and optimize creative effectiveness—not just one-off analysis.”

*– Global Chief Marketing/Innovation Officer,
Creative Production Consultancy*

THE NEXT PHASE: FULL-FUNNEL INTEGRATION

Current solutions are a preview of a more integrated future—one where **strategic planning, creative development, media activation, and measurement are tightly connected** through a shared data infrastructure.

This evolution is not happening uniformly. Solution development has often outpaced organizational change. Yet the pressure to improve performance across an increasingly complex marketing mix is pushing brands and agencies to rethink how they manage creative—not as a static deliverable, but as a **living system of insight, iteration, and optimization**.

In this emerging model, the connective tissue is data—specifically, the integration of:

- **Media intelligence** (where and when assets are delivered),
- **Audience intelligence** (who they’re reaching and how they behave), and
- **Creative intelligence** (what’s being said, how it performs, and how it can improve).

As these systems become more unified, the ability to deliver **personalized, effective, and measurable experiences at scale** will no longer be aspirational—it will be operationalized.

SECTION III

CREATIVE INTELLIGENCE: IMPROVING MARKETING EFFECTIVENESS

As media and creative spending continue to rise, so does the pressure to demonstrate a return—both in terms of **production efficiency and output effectiveness**. Marketers must now measure not only what was spent but also what it delivered.

Yet despite advances in media and audience measurement, creative remains the **least standardized component** in the performance equation.

“Creative investment is often viewed like a ‘black hole’—everyone talks about it, no one can explain it. . . . Brands keep asking: How do I explain why I’m spending so much money on creative and what is it getting me?”

– CEO,
Global Marketing Analytics

“We bring so much baggage to all the ways in which we think about what creative is worth. There’s no consistent or rational framework for valuing creative work anymore.”

– Managing Partner,
Global Advertising Law Firm

THE PROBLEM: CREATIVE LACKS A MEASUREMENT STANDARD

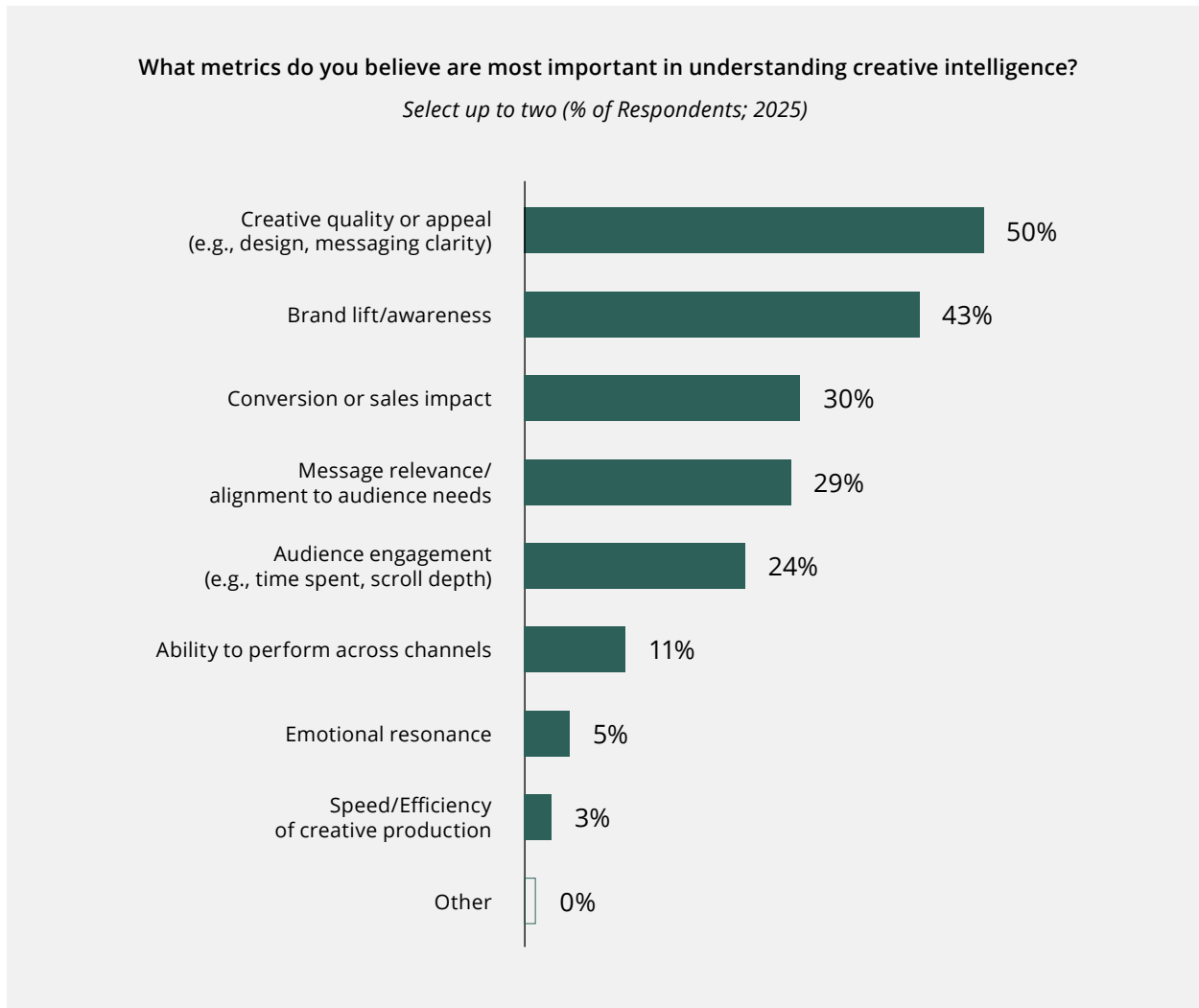
Unlike media and audience, creative performance is rarely measured with rigor or consistency. Traditional approaches—such as brand lift, sales lift, or post-campaign surveys—are still in use; however, they fail to reflect the value of creative investment fully. What’s missing is a data-driven system to **capture, quantify, and optimize creative performance over time**.

Thanks to advancements in AI and metadata modeling, that’s beginning to change. By **turning creative into data**, marketers can now track an expansive set of inputs across creative, media, and audience dimensions. These include:

- Which assets ran, in what formats, and across which channels
- Specific creative elements: imagery, text placement, colors, voiceover, pacing, etc.
- Asset versioning and template counts
- Utilization and re-utilization rates (including component-level reuse)
- Viewer engagement (e.g., dwell time, viewed segments)
- Contextual and behavioral data (e.g., time of day, device, session info)
- Audience exposure frequency
- Asset production cost
- Creative fatigue/burnout rate
- Production cycle time (brief-to-launch)
- Emotional impact and brand lift signals
- SEO impact (for both human and agent-based retrieval)



FIGURE 3 – MARKETERS PRIORITIZE CREATIVE QUALITY AND BRAND IMPACT AS THE LEADING INDICATORS OF CREATIVE INTELLIGENCE



Source: Winterberry Group Survey N=207 (2025)

THE SOLUTION: APPLY CREATIVE INTELLIGENCE ACROSS THE FULL MARKETING LIFECYCLE

With creative intelligence, brands and agencies can now embed measurement across every stage of the creative and campaign process.

1. Briefing & Creative Development

- Utilize historical creative performance to inform briefs, aligning desired outcomes with audience expectations.
- Score concepts pre-flight using modeled predictors of performance to reduce unproductive creative.
- Automate testing of creative treatments with faster feedback loops and AI-powered versioning.
- Centralize production tools and feedback systems to reduce cost, time, and redundancy.
- Introduce **creative risk-scoring models** to evaluate when bold creative is justified.

"Different brands have different appetites for risk. Challenger brands often take bigger swings, while market leaders play it safe. A risk scoring model could guide those decisions. We can measure the effect of creative, but when it's time to sign off on something bold, we don't have the data to support it. That's the real gap Creative Intelligence should fill."

*– Chief Strategy Officer,
Global Agency Network*

2. Real-Time Activation & Optimization

- Adapt creative on the fly based on performance and contextual signals (location, time of day, audience behavior).
- Use historical and in-session data to personalize content for high-value segments and returning users.
- Refine messaging mid-campaign using near-real-time performance insights.

3. Post-Campaign Measurement & Longitudinal Value

- Integrate creative data into MMM and attribution models to assess impact alongside media and audience.
- Track creative variability by region, language, or audience.
- Understand the creative influence on upper-funnel metrics, such as consideration, and mid-funnel engagement.
- Allocate budget more strategically by identifying which creative assets contribute most to ROI.
- Measure **creative lifetime value (Creative LTV)** to manage asset refresh cycles better and avoid overspending on worn-out content.

"Brands struggle to know when to retire a creative platform. There's no clear indicator of wear-out, and many mistake fading performance for failure."

*- Head of Advisory NA,
Global Creative Effectiveness Organization*

"Creative needs to be measured both at a moment in time and across its lifecycle. Bridging cost data with media performance could help quantify the actual value of creative over time."

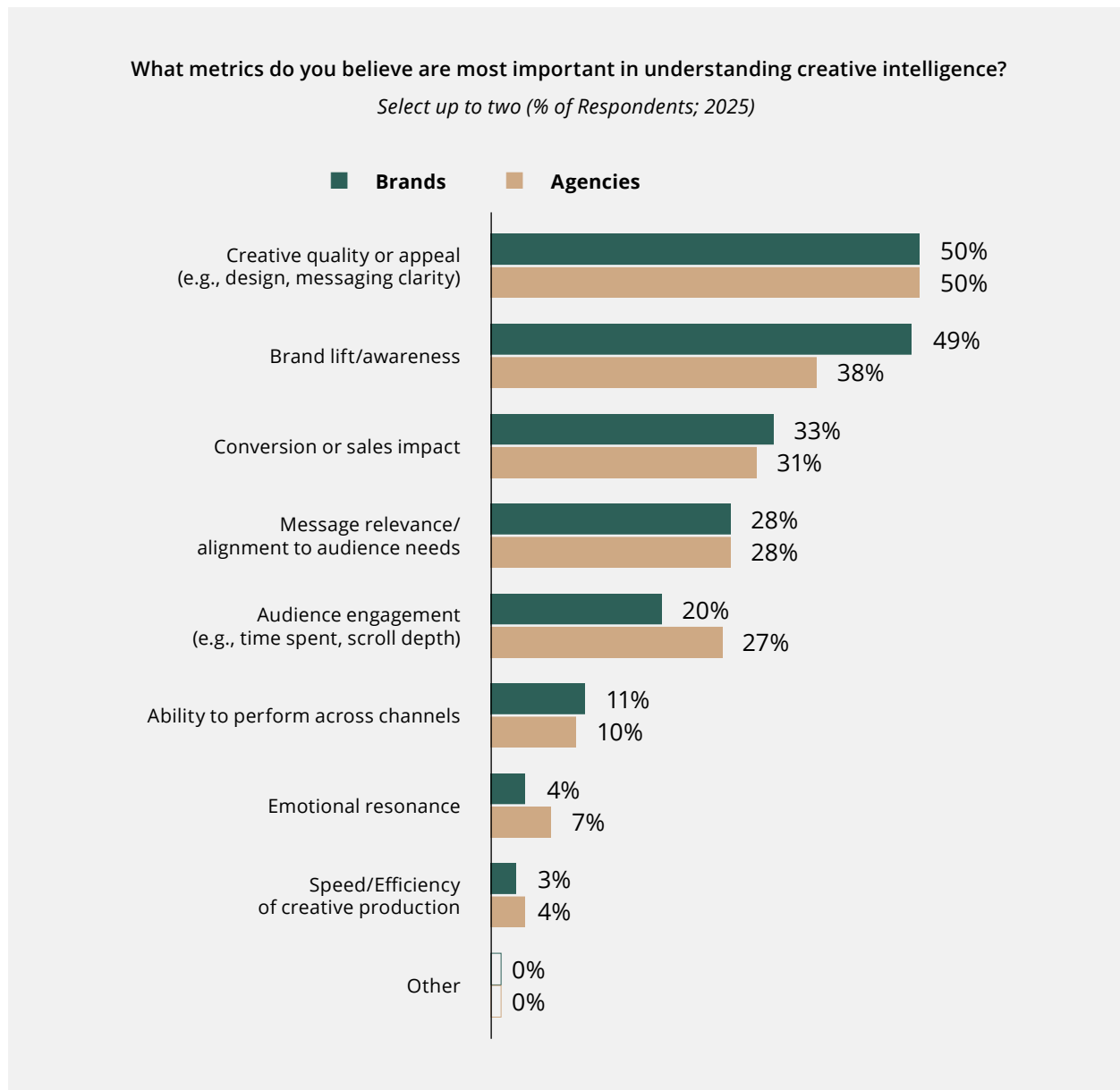
*- Chief Strategy Officer,
Creative Production Consultancy*

"There's a point when creative peaks, and a point where it starts delivering diminishing returns. We need to know where we are on that curve so we're not wasting media dollars on worn-out assets."

*- Chief Marketing Officer,
Luxury Fitness and Lifestyle Brand*



FIGURE 4 – CREATIVE QUALITY IS UNIVERSALLY VALUED; BRANDS FOCUS MORE ON CONVERSIONS; AGENCIES LEAN INTO AUDIENCE RELEVANCE AND ENGAGEMENT



Source: Winterberry Group Survey N=207 (2025)



IMPLICATIONS FOR BRANDS VS. AGENCIES

While the specific use cases may differ, the imperative is shared: both brands and agencies need more precise data to align investment with outcomes. Across markets, from North America to EMEA to APAC, the desire for greater **transparency, improved efficiency, and stronger ROI on creative** is universal.

THE NEXT WAVE OF USE CASES

As Creative Intelligence matures, emerging use cases include:

- **Understanding how LLMs perceive and rank branded content** (critical for organic discovery, AI search, and future SEO).
- **Creative audit systems** that track which assets were shown to which audiences—enabling accountability and insight for personalization, compliance, and offer management.
- **Unified models** that connect:
 - Creative development inputs
 - Media delivery data
 - Performance outcomes (sales lift, brand equity, consideration)

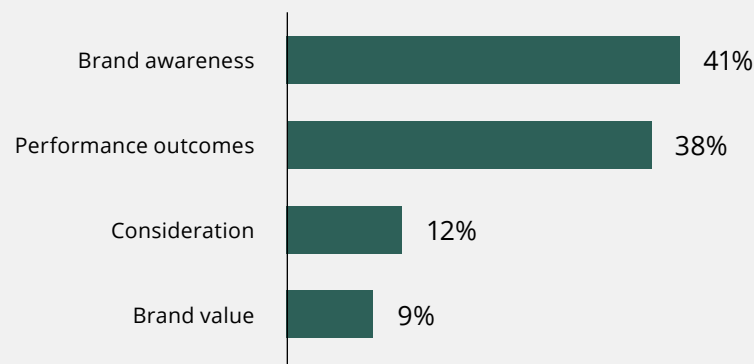
"If we can bridge cost intelligence with media intelligence, we can come back to what the value of that creative was—both at a point in time and over time."

*- Global Chief Marketing/Innovation Officer,
Creative Production Consultancy*



FIGURE 5 – CREATIVE INTELLIGENCE IS SEEN AS MOST IMPACTFUL FOR UNDERSTANDING BRAND AWARENESS AND PERFORMANCE OUTCOMES

In your opinion, where is creative intelligence most important in helping to understand impact?
(% of Respondents; 2025)



Source: Winterberry Group Survey N=207 (2025)

THE BIGGER PICTURE: A CLOSED-LOOP SYSTEM FOR CREATIVE ROI

Creative Intelligence isn't just another analytics tool—it's the foundation for **measuring and optimizing marketing effectiveness** across the full lifecycle:

- **Short-term:** Real-time performance data fuels in-channel optimization, such as impressions, viewable impressions, click-through rates, and creative occurrences.
- **Mid-term:** Program-level insights improve messaging and allocation such as attention metrics (i.e., eye-tracking and eye-scanning data) and creative ID analysis.
- **Long-term:** MMM and brand equity models capture cumulative impact of creative over time.

By embedding creative data into a unified measurement framework, marketers can make **faster, smarter decisions**, reduce creative waste, and deliver more personalized experiences—at scale, and with greater financial discipline.

The path forward is clear: to achieve true personalization and performance, **creative must be managed as a measurable, optimizable, and strategic asset.**

SECTION IV

BARRIERS TO SUCCESS IN ACTIVATING CREATIVE INTELLIGENCE

While Creative Intelligence represents a powerful opportunity to enhance marketing effectiveness, the path to adoption is far

from straightforward. Several persistent structural, organizational, and technical barriers have hindered progress—even as the market has evolved.

1. Internal Misalignment Across the Marketing Organization

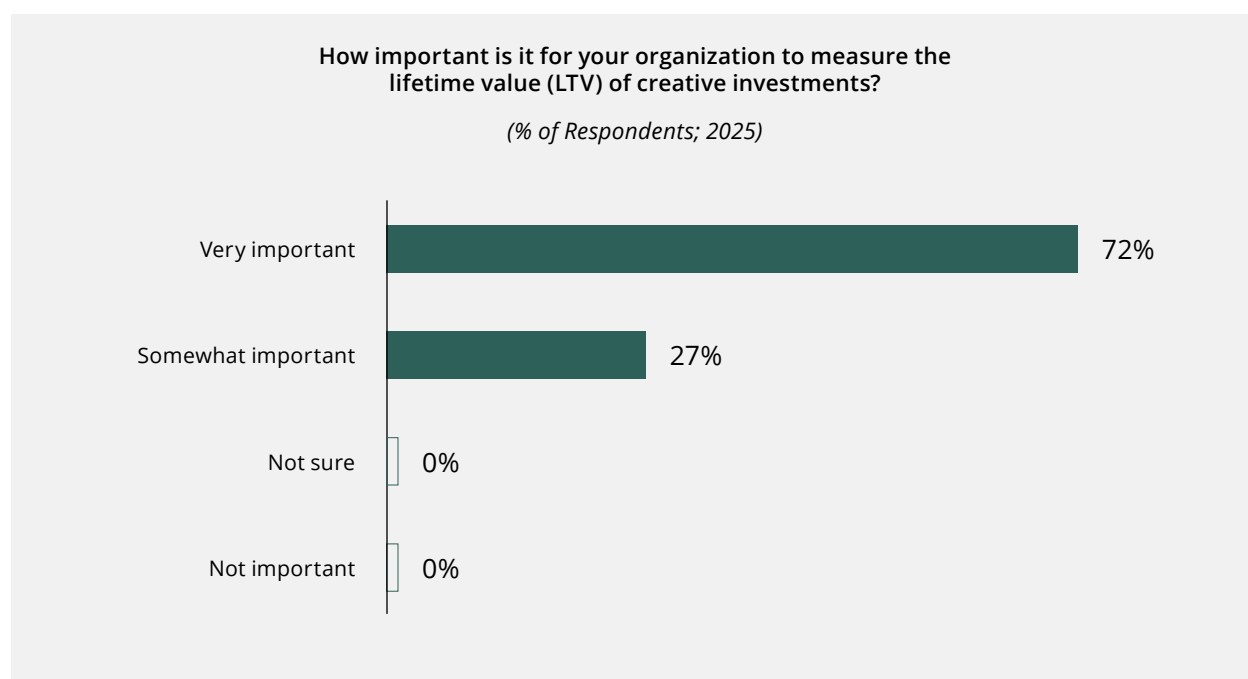
A key inhibitor to adoption is the lack of alignment within the marketing function itself—both across internal teams and in coordination with other enterprise stakeholders.

- Many marketing organizations remain divided into functional silos—brand, media, creative, analytics—each with its own goals, processes, and tools.
- These divisions are often replicated at the channel level (e.g., paid social vs. email), further fragmenting strategy and limiting end-to-end campaign orchestration.
- As a result, creative development is often disconnected from audience insights, media planning, and performance measurement, hindering the application of intelligence across the entire funnel.

"While momentum is growing . . . the adoption of creative intelligence practices has lagged. Institutional inertia and siloed organizational structures (e.g., separation between media and creative) are key barriers."

*– CEO,
Creative Performance Technology Platform*

FIGURE 6 – NEARLY ALL MARKETERS VIEW MEASURING THE LIFETIME VALUE OF CREATIVE INVESTMENTS AS IMPORTANT—WITH 72% CALLING IT VERY IMPORTANT



Source: Winterberry Group Survey N=207 (2025)

2. Persistent Agency Fragmentation and Misaligned Incentives

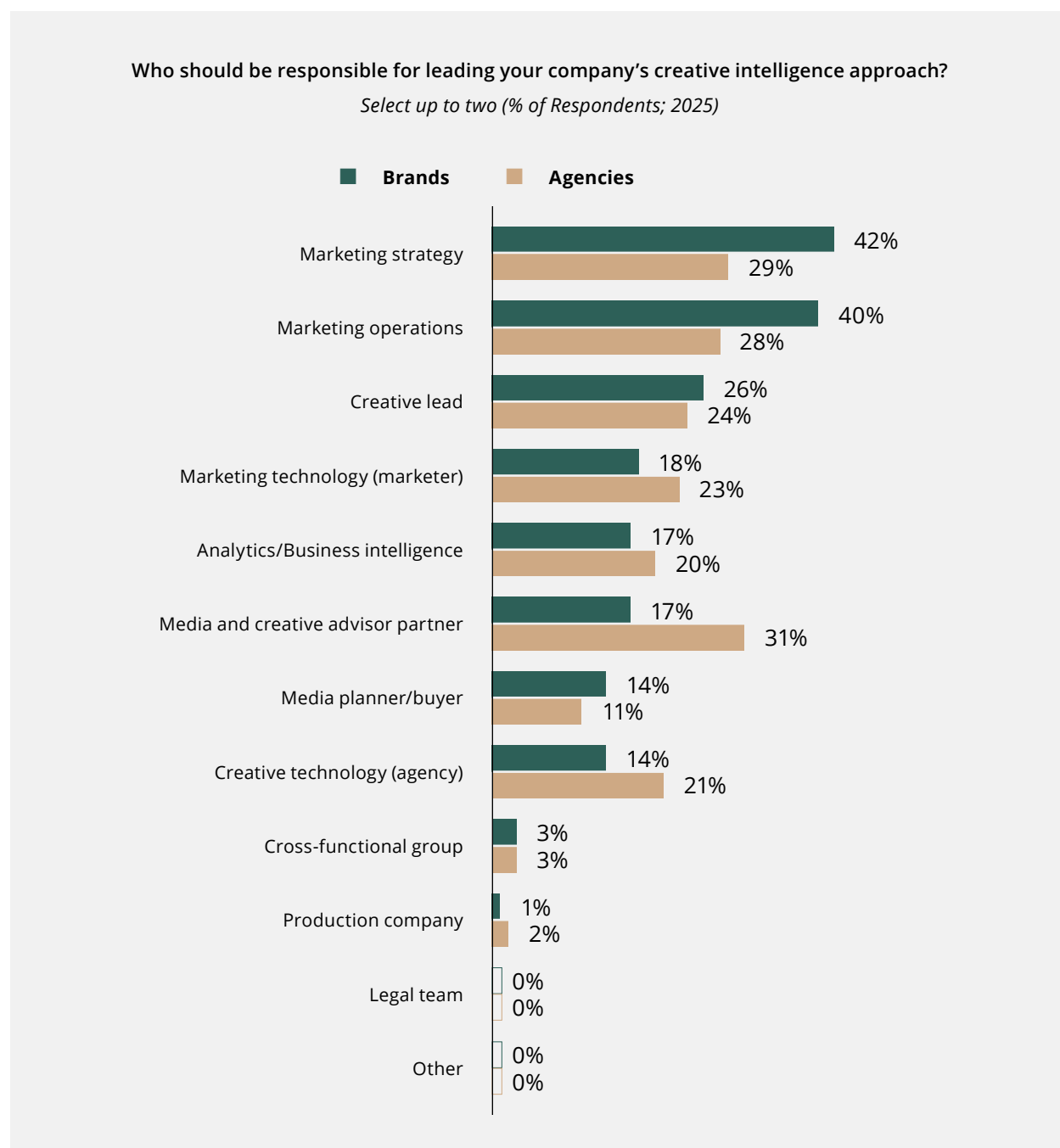
Even as brands seek integration, many agency relationships remain structured in ways that discourage collaboration and outcome-based innovation.

- Brands often work with separate creative and media agencies—sometimes segmented further by objective or channel—creating **disjointed strategies and limited feedback loops**.

Compensation models have traditionally rewarded outputs (e.g., volume of assets or hours billed) rather than outcomes, which limits the incentive to adopt performance-oriented, creative approaches.

- Creative agencies, in particular, may view Creative Intelligence as a **threat to creative freedom**, while media and performance agencies are generally more receptive due to their focus on ROI and measurable impact.

FIGURE 7 – MARKETING STRATEGY AND OPERATIONS LEAD FOR BOTH GROUPS, BUT AGENCIES FAVOR EXTERNAL ADVISORY ROLES MORE THAN BRANDS



Source: Winterberry Group Survey N=207 (2025)

3. Lack of Standardized and Unbiased Creative Performance Metrics

One of the most persistent challenges is not just the absence of a standardized measurement framework, but the lack of high-quality, unbiased creative performance indicators and consistent scoring methodologies.

"We do not have the metric to explain the lifetime value of creative, the audience, people, the data... What are the outcomes, and how do we explain the value of creative both at a point in time and over its lifetime?"

*– Chief Strategy Officer,
Creative Production Consultancy*

Without a standard set of KPIs and methodologies, it's difficult for CMOs to justify investment in creative optimization—or for organizations to prioritize creative data as a strategic asset.

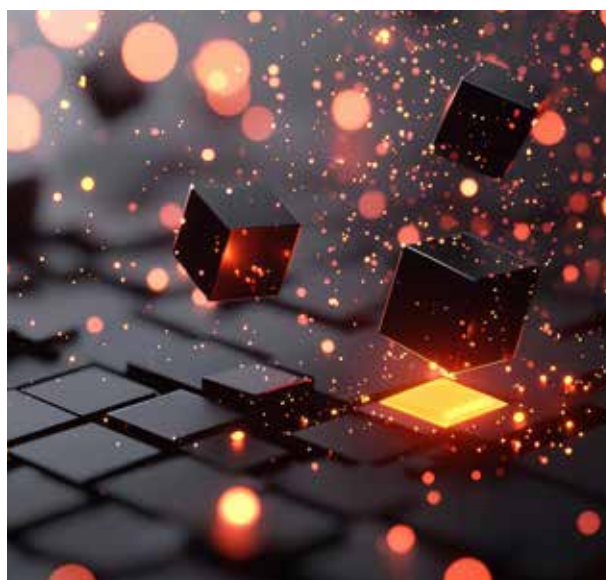
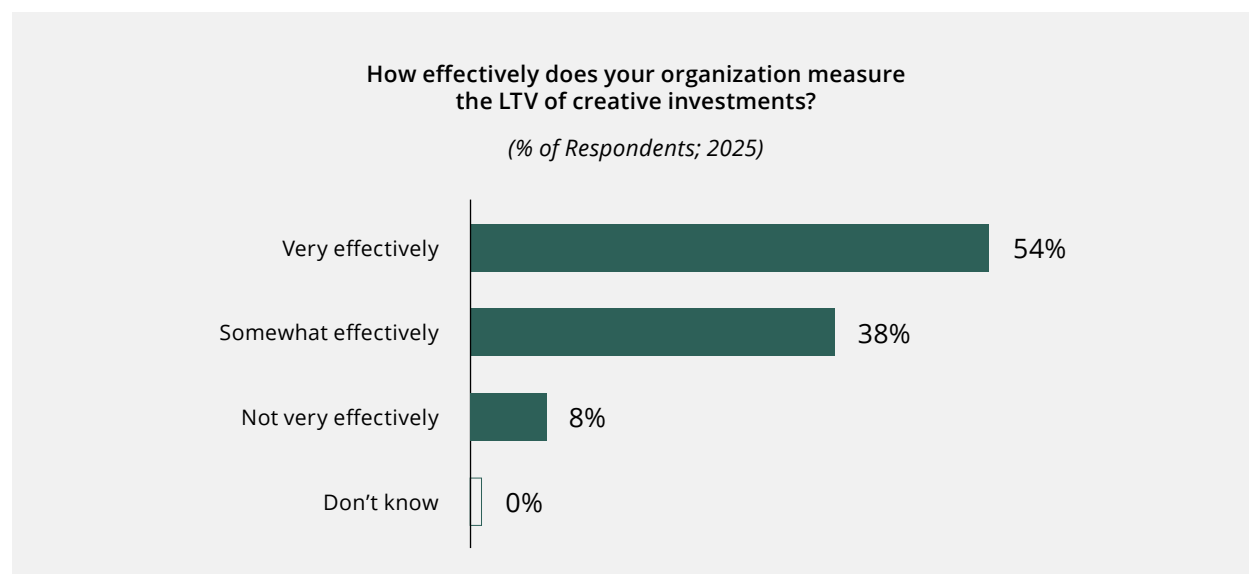


FIGURE 8 – DESPITE HIGH PERCEIVED IMPORTANCE, ONLY 54% SAY THEIR ORGANIZATION MEASURES CREATIVE LTV VERY EFFECTIVELY



Source: Winterberry Group Survey N=207 (2025)

4. Unclear Ownership of Marketing Technology and Creative Systems

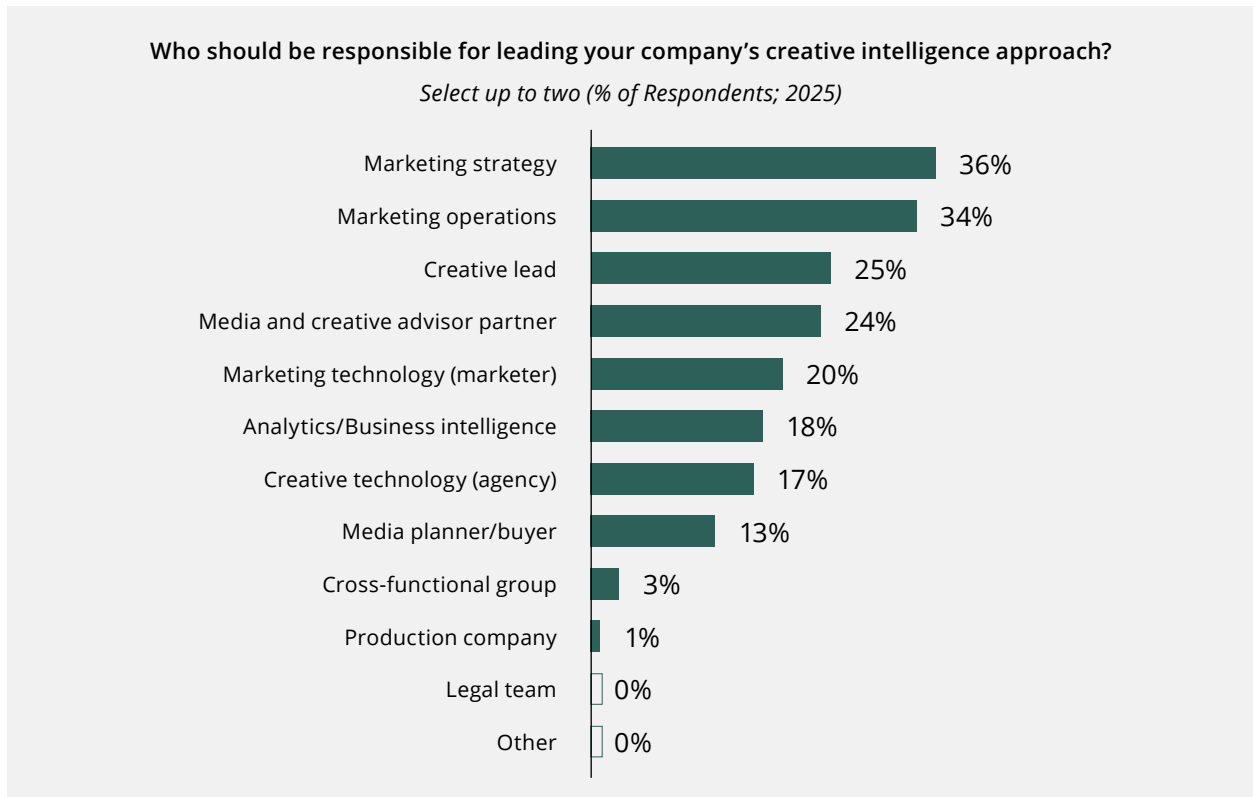
For over a decade, marketing and IT teams have collaborated to build a robust audience data infrastructure—integrating CDPs, identity graphs, and data lakes. But when it comes to creative and content systems, ownership remains unresolved.

- Creative assets are still scattered across **CMS platforms, external and internal DAMs, activation tools, local folders, and shared drives**—making reuse, measurement, and optimization difficult.
- Unlike audience data, which typically has a designated team and governance model, **creative assets lack a centralized owner or standard taxonomy.**

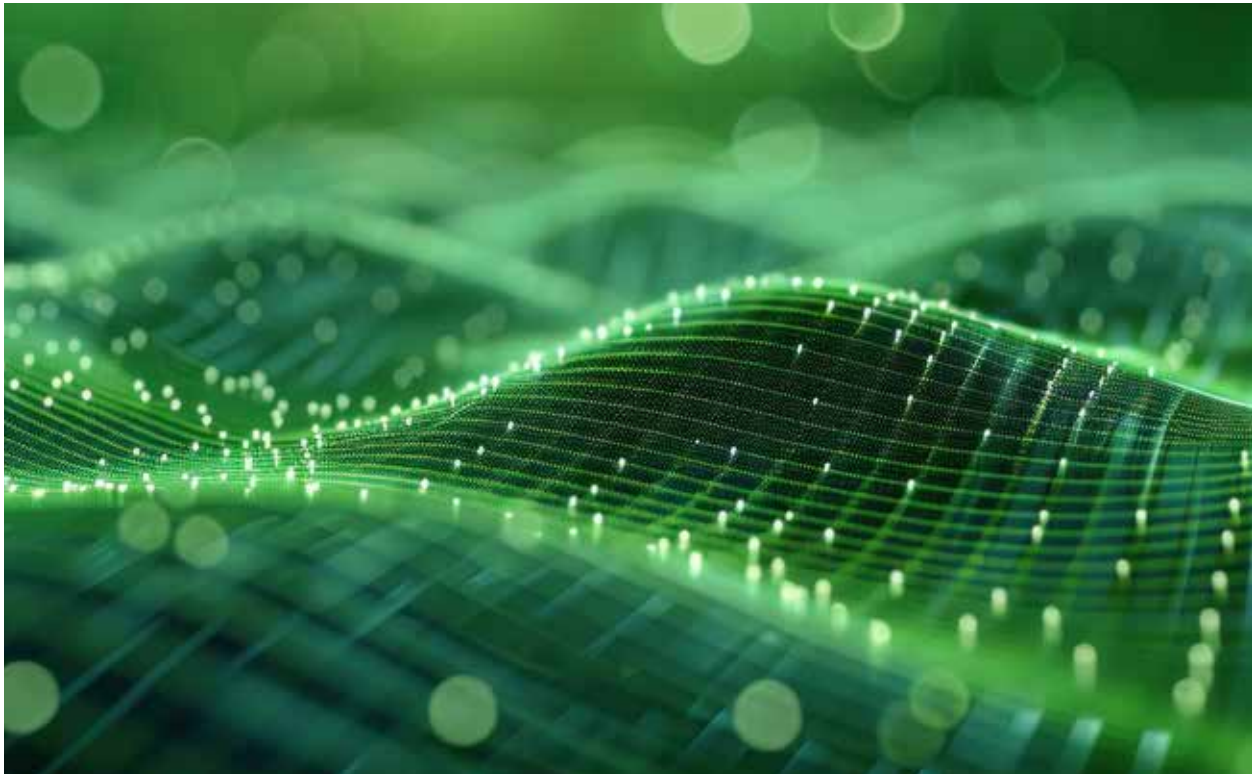
"Many companies aspire to adopt Creative Intelligence, but their MarTech infrastructure and team structures are not yet equipped to support it. There's often a disconnect between ambition and capability."

*– President,
Global Media Agency*

**FIGURE 9 – CREATIVE INTELLIGENCE IS EXPECTED TO BE LED
BY MARKETING STRATEGY AND OPERATIONS**



Source: Winterberry Group Survey N=207 (2025)

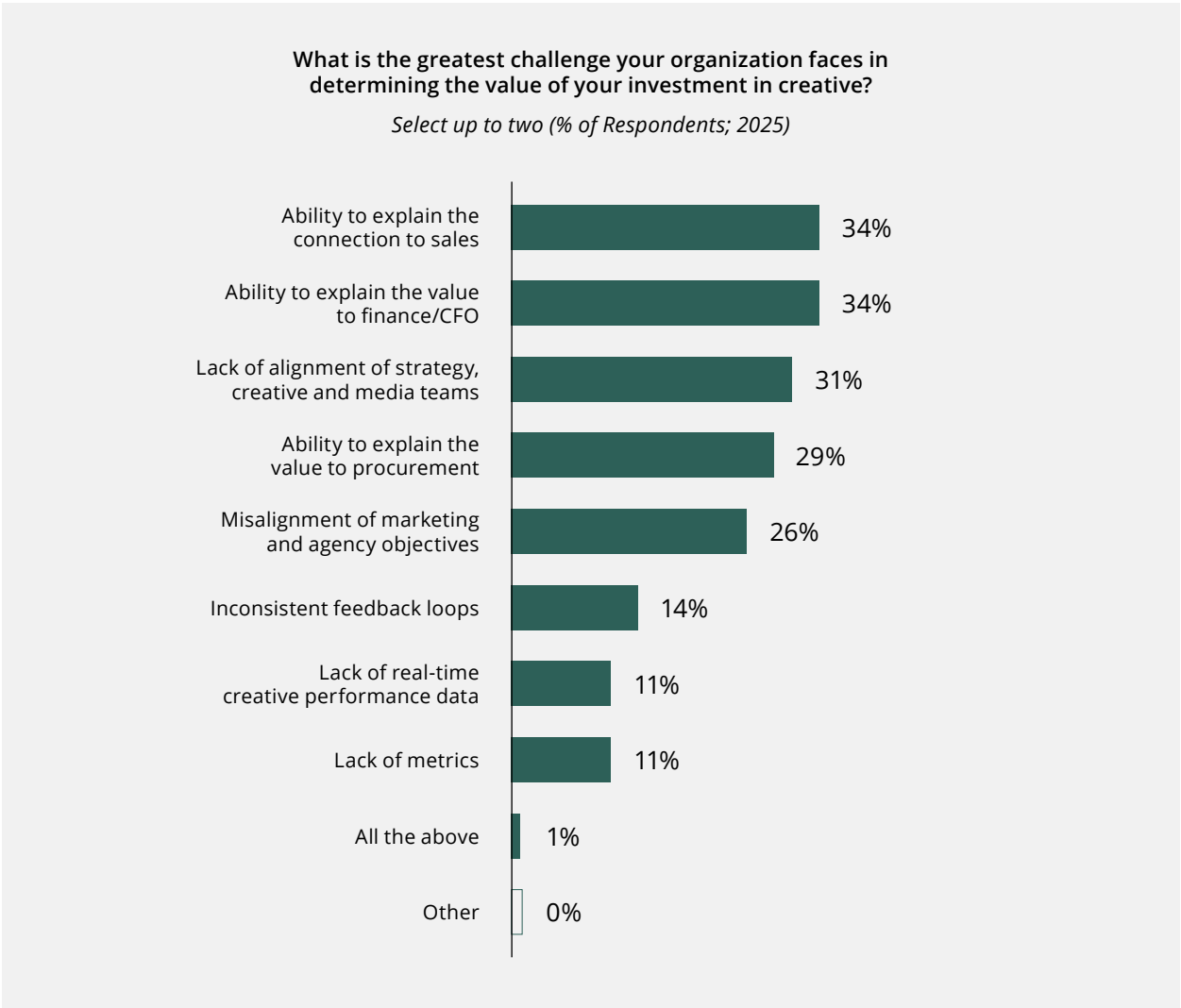


The combined effect of the barriers above—organizational silos, fragmented agency ecosystems, outdated compensation models, unclear tech ownership, and inconsistent measurement—makes Creative Intelligence difficult to operationalize.

Yet history shows the industry can overcome these hurdles. Past

transformations—such as the adoption of programmatic media, the rise of Customer Data Platforms (CDPs), or the integration of digital and linear data—were driven by a combination of **macroeconomic shifts, financial pressures, and technological breakthroughs**. The same is likely to happen with Creative Intelligence.

FIGURE 10 – SALES, FINANCE, AND CROSS-TEAM ALIGNMENT EMERGE AS THE TOP BARRIERS TO DEMONSTRATING CREATIVE VALUE



Source: Winterberry Group Survey N=207 (2025)



FIGURE 11 – COST CONTROL, SPEED, AND COMPLIANCE ARE THE TOP OPERATIONAL BARRIERS TO EFFECTIVE CREATIVE ACTIVATION



Source: Winterberry Group Survey N=207 (2025)

THE PATH FORWARD

Progress will require deliberate action in several key areas:

- **Defining a framework** to consistently measure and value creative performance—across both short- and long-term outcomes
- **Breaking down silos** within marketing teams and building integrated workflows that connect media, creative, and insights
- **Realigning agency relationships and incentives** to encourage performance-driven collaboration
- **Clarifying ownership** of creative systems and data, supported by enterprise-grade governance
- **Investing in unified creative libraries** with standardized metadata, built to power reuse, personalization, and AI integration

While the barriers are real, they are not insurmountable. And with personalization at scale now within reach, organizations that take early steps to close these gaps will be well-positioned to lead in the next era of marketing effectiveness.

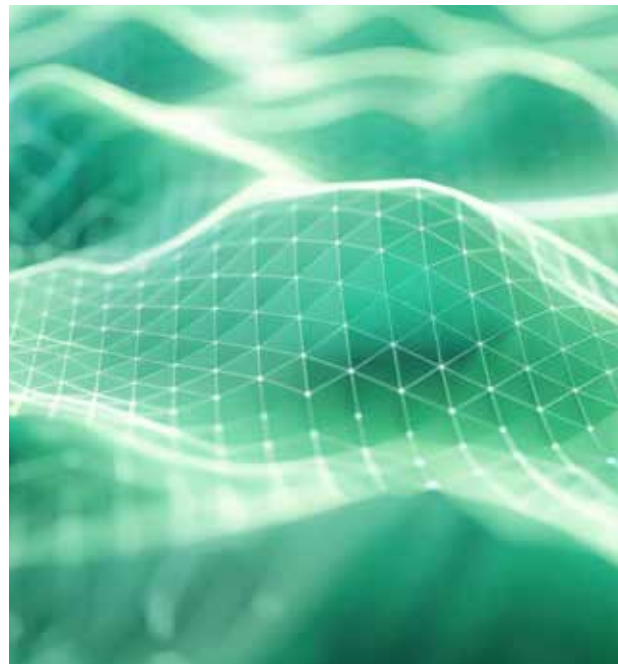
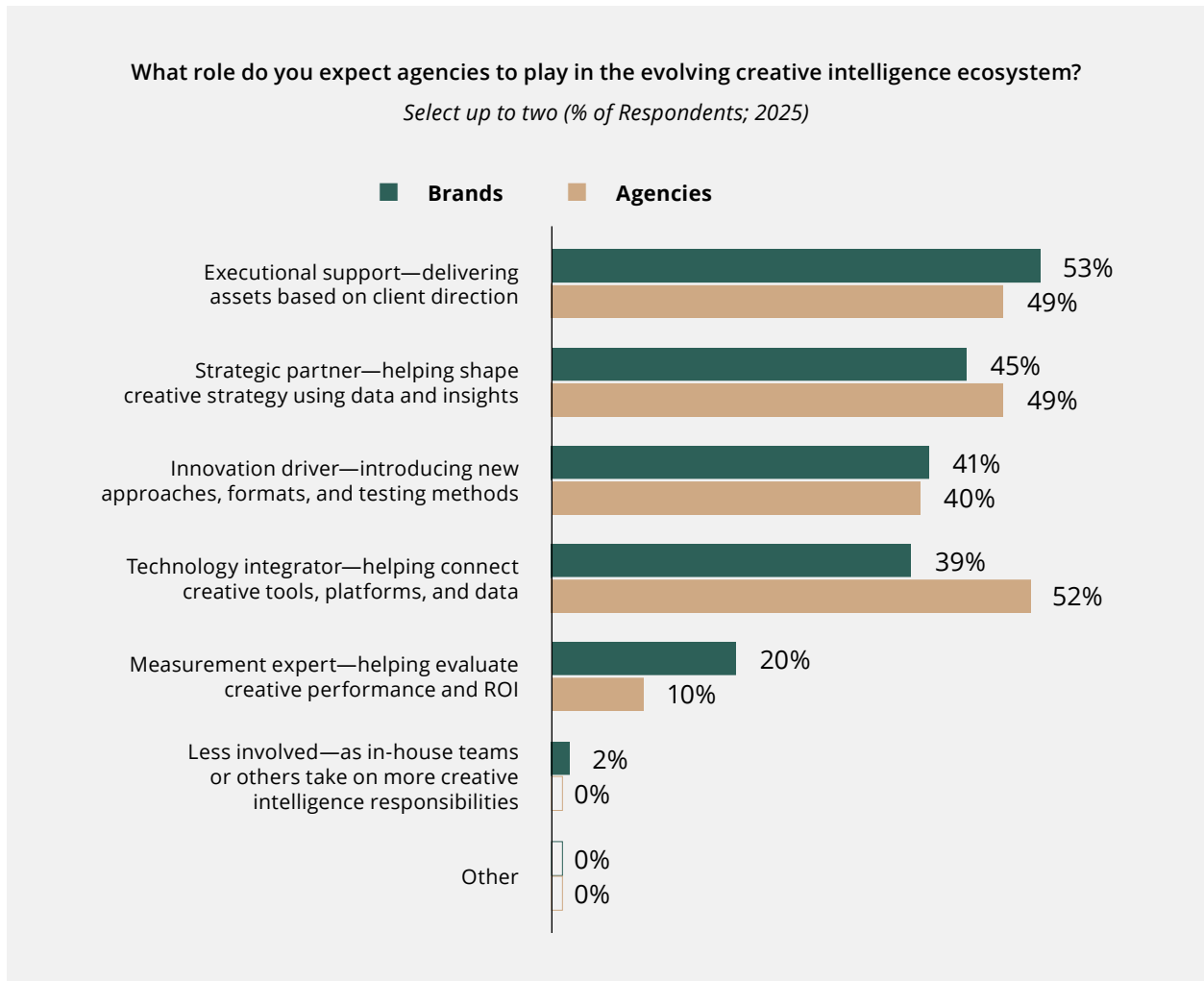


FIGURE 12 – BRANDS PRIORITIZE AGENCIES FOR EXECUTION; AGENCIES PRIMARILY SEE THEMSELVES HAVING TO PLAY IN TECHNOLOGY AND STRATEGIC INTEGRATION



Source: Winterberry Group Survey N=207 (2025)

SECTION V

OUTLOOK FOR CREATIVE INTELLIGENCE

The adoption of **Creative Intelligence solutions**—those that integrate creative data with audience and media signals—is accelerating. Fueled by rapid advancements in AI, what was once a distant ambition is becoming a present-day imperative. These tools are beginning to close long-standing gaps in marketing effectiveness by enabling a more intelligent, data-driven creative process.

A TRANSFORMATIONAL SHIFT, POWERED BY AI AND DATA INTEGRATION

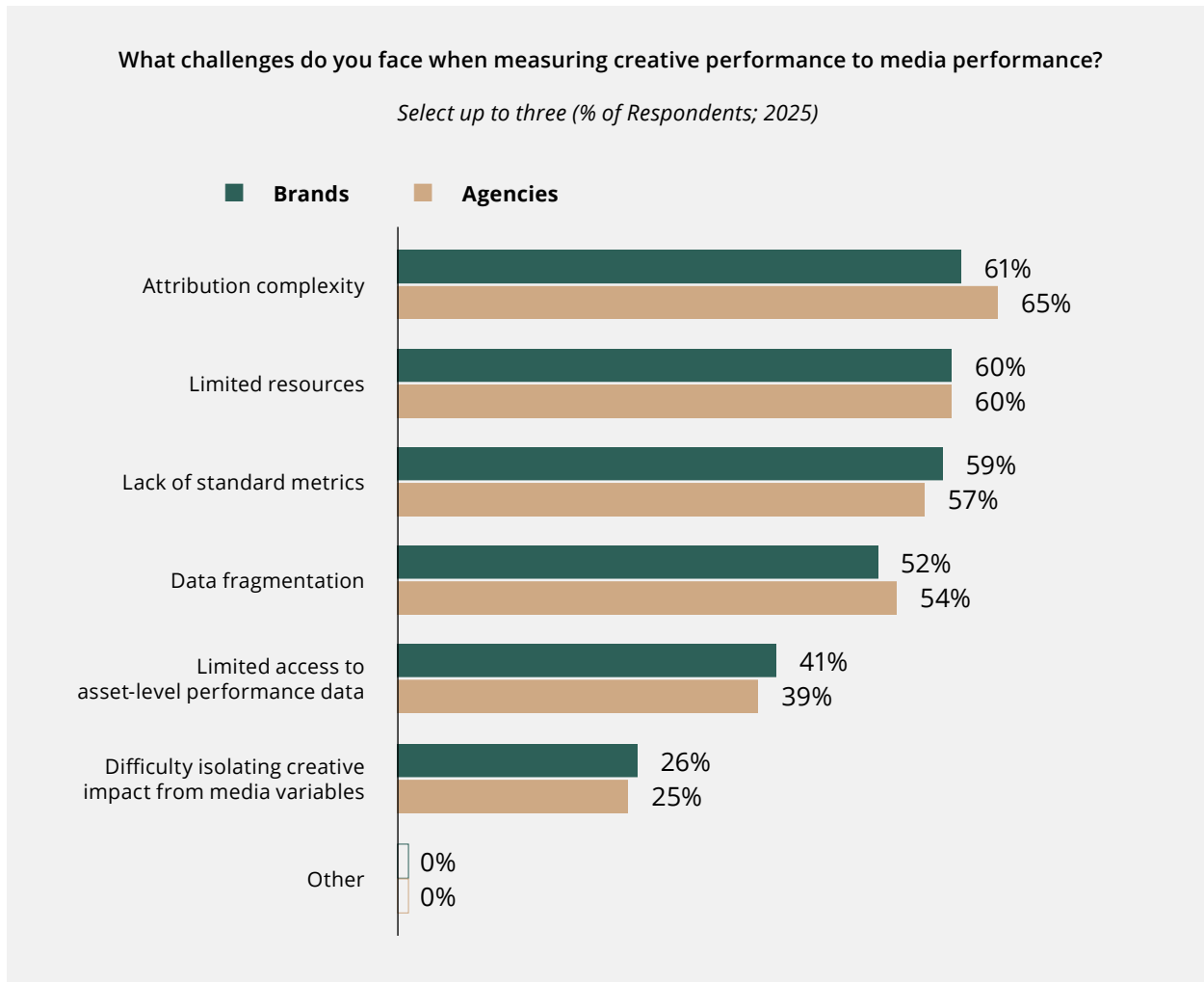
Creative Intelligence is more than a trend—it is a structural shift in how marketing operates. The ability to apply creative data across the end-to-end lifecycle—from strategic brief through execution and optimization—has the potential to unlock **step-level gains in efficiency and performance**.

From reducing the time to develop a brief to real-time asset iteration, and from modular creative deployment to full-funnel measurement, Creative Intelligence aligns people, platforms, and performance metrics around a unified vision.

"AI can assist with content creation but still requires human intelligence for critical thinking, prompting, and guiding the process. Human input is essential to ensure the quality and relevance of the content produced."

– SVP,
Marketing Operations and
Technology Services Provider

FIGURE 13 – BOTH BRANDS AND AGENCIES FACE THE SAME BARRIERS — ATTRIBUTION COMPLEXITY, LIMITED RESOURCES, AND LACK OF STANDARD METRICS



Source: Winterberry Group Survey N=207 (2025)

WHAT WILL DRIVE MARKET ADOPTION? FOUR FORCES TO WATCH

While barriers remain, several key dynamics point to broader adoption of Creative Intelligence in the near term:

1. The Volume Problem Has Reached a Breaking Point

Marketing teams can no longer sustain traditional workflows. The **exponential growth in creative asset volume**—across formats, versions, and channels—has outpaced the capacity of legacy processes. The persistent pressure to “do more with the same or less” is accelerating the shift toward **AI-powered tools that can scale production and automate optimization**.

This dynamic is especially pronounced in **CPG, retail, and financial services**, where the demands for personalization and the need for multichannel execution require intelligent systems to maintain optimal performance.

2. AI Is Shortening the Innovation Cycle

Unlike past waves of marketing technology, AI tools—particularly those rooted in **generative models and predictive analytics**—

are being adopted at a rapid pace. Device accessibility, cloud infrastructure, and off-the-shelf capabilities have lowered the barrier to entry. As marketers gain **direct engagement with consumers** through owned and paid channels, the volume of creative and behavioral data continues to grow—providing a foundation for optimization.

However, **speed without structure creates risk**. Governance, compliance, and brand safety must evolve in parallel to AI capabilities to ensure responsible scale.

3. The Audience Data Layer Is Ready—Creative Is Next

The last five years have seen significant investment in **audience infrastructure**, including CDPs, identity resolution, and consent management platforms. These are now approaching maturity. The next phase is extending that **unified data layer to creative assets**—enabling decisioning engines and orchestration platforms to act on creative inputs, not just media and audience signals.

As marketing operations functions expand their mandate—and partner more closely with IT—creative and media assets are

increasingly being viewed as **corporate data assets**: governed, versioned, and optimized for business value.

4. The Rise of Intelligent Studio Models

New creative studio models are emerging—combining centralized production, AI-driven development, and unified measurement frameworks. These “**intelligent studios**” integrate talent, tools, and data within a single operating environment, enabling real-time, modular content creation across teams.

“A dream is having one tool that everyone looks at—communications, media agency, creative agency, brand, and regulatory all look at it. Would allow you to look across channels, placement and audience and for a group of creatives to see what to change out for better engagement.”

*– Marketing Executive,
Global Consumer Health and
Pharmaceutical Company*

The result is reduced time to brief, increased brief accuracy, and creative output grounded in performance insight. When combined with intuitive, AI-enabled tools, analytics become **more human-readable and actionable**, bringing data closer to creative decisions.

WHAT'S NEXT:

SHORT-TERM TRENDS AND LONG-TERM VISION

Winterberry Group anticipated the rapid adoption of personalized creative at scale and the growing use of creative data and analytics for optimization are gaining momentum now, but are expected enter a period of gradual maturation over the longer term

From our analysis of the marketing, we are seeing early traction and adoption within the walled gardens and across key digital channels:

- **Social media** (API-driven, high-volume, real-time testing),
- **Email/messaging** (consented, owned data), and
- **Programmatic digital** (display, video, audio, CTV).

The continued rollout of **measurement frameworks**, supported by cross-channel data integration and commercial mix modeling, will anchor these efforts and prove out significant improvement in ROI, ROMI and creative impact.

LOOKING AHEAD:

A MORE INTELLIGENT MARKETING ECOSYSTEM

Over time, Creative Intelligence will enable a marketing environment where:

- Each creative asset is **versioned, measured, and optimized** at a component level for every channel;
- The lifetime value of creative assets can be calculated and forecasted;
- Teams can work **faster, smarter, and more collaboratively**, with fewer handoffs;
- Omnichannel campaigns are built not on guesswork, but on evidence.

“It is time to eliminate the artificial divide between working media and non-working creative. Now is the time to work more effectively”

– Summary takeaway

The long-term outcome is a **living creative system**—one that evolves with every campaign, learns from every touchpoint, and adapts in real time to improve performance and reduce waste. This isn't just a vision for the future. It's a roadmap for today's marketers willing to lead the change.

Thank you for taking the time to read this research paper, the first in a series of research work designed to deeply assess the data, technology, the market size and requirements for organization maturity.

METHODOLOGY

The conclusions in this report are based on the results of a comprehensive primary research effort conducted by Winterberry Group between March and May 2025. This research included a series of thought leader interviews with senior executives from major companies across the advertising and marketing services ecosystem—including marketers, creative, media professionals, technology platforms, analytic firms, and others. Additionally, it incorporates responses from a survey of more than 200 agency and brand leaders from the US and UK.

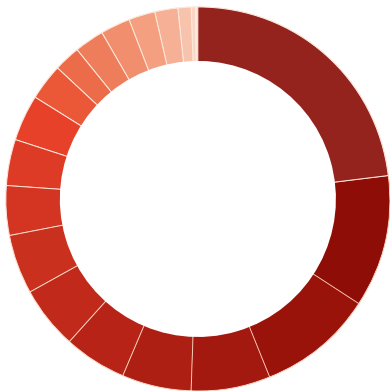
Distribution of Respondents by Country

(% of Respondents)



Which of the following best describes the industry for which you work?

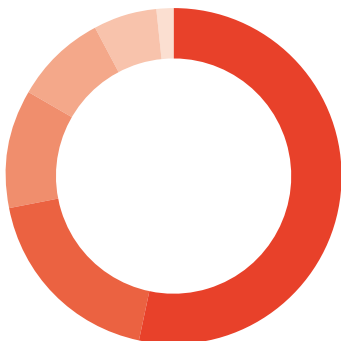
(% of Respondents)



■ Advertising	23.2%
■ Technology and Telecommunications	11.1%
■ Financial Services (Banking/Investing/Lending)	9.7%
■ Health/Beauty	6.8%
■ Consumer Packaged Goods (CPG)/Fast Moving Consumer Goods (FMCG)	5.8%
■ Automotive	5.3%
■ Martech/adtech	5.3%
■ Media and Entertainment	4.8%
■ Food/ Restaurants	4.3%
■ Business Services	3.9%
■ Home Improvement	3.9%
■ Consumer Electronics	2.9%
■ Insurance	2.4%
■ Transportation	2.4%
■ Real Estate	2.4%
■ Alcohol/Beverage	2.4%
■ Travel/Hospitality	1.9%
■ Home Décor/Furniture/Mattress	1.0%
■ Over-the-counter/Pharmaceuticals	0.5%

Which of The Following Best Describes Your Organization's Primary Business Focus?

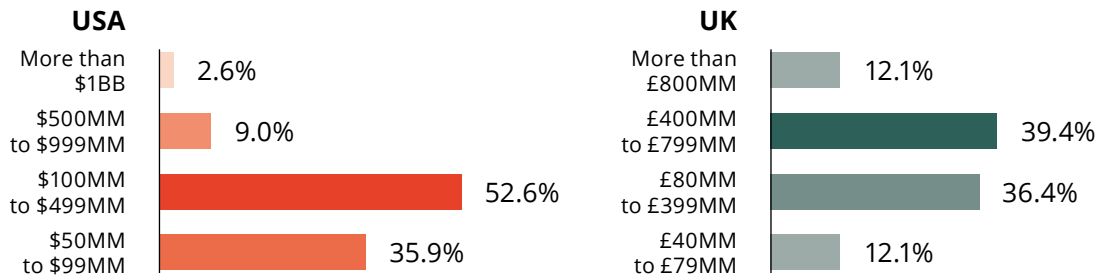
(% of Respondents)



■ A Brand Or Advertiser	53.6%
■ A Creative Agency	18.4%
■ A Media Agency	11.6%
■ An Adtech Or Martech Provider	8.7%
■ An Analytics Or Measurement Provider	6.3%
■ A Content Or Creative Production Company	1.4%

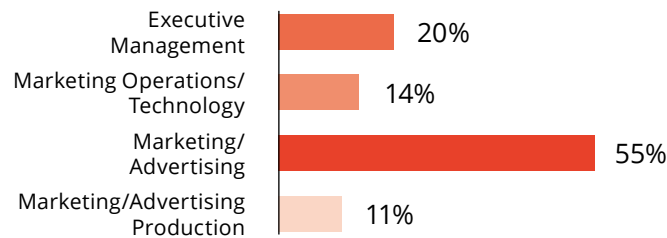
Approximately What Was Your Company's Revenue/Turnover Last Year?

(% of Respondents)



Which of the Following Best Describes Your Department or Current Functional Role Where You Work?

(% of Respondents)



THANK YOU TO THE FOLLOWING COMPANIES FOR SHARING THEIR TIME AND INSIGHTS DURING THIS STUDY:

4as, Adskate, Amazon, Analytic Partners, APR, Constellation Brands Inc., Continuum, Consiglieri, Contagious, Creative X, Dentsu, Diageo, Equinox, Fordham University, Frankfurt Kurnit Klein & Selz, Haleon, IPSOS, Jellyfish, Joan Creative, Johnson & Johnson, JWP/Connatix, LinkedIn, Martech Tribe, Mass Analytics, Monks, MediaSense, MSQ, New Engen, Nielsen, Oliver Agency, PersuasionXP, Real Eyes, SC Johnson, Sky, Smartly, Spring Boards.ai, UofDigital, Vidmob, Worldcom Out of Home, WPP.

ABOUT OUR SPONSORS

ASSOCIATION SPONSOR



The International Advertising Association (IAA) North America Chapter, based in New York, strives to share the collective wisdom of thought leaders in brand marketing, advertising, media, technology, and academia to support North American marketing professionals in navigating a world of constant change.

The IAA is committed to be the global compass of marketing communications. Established in 1938, the IAA is a leading global association with a presence in 56 countries representing all spheres of the marketing and communications industry. For over eighty-five years, the IAA has championed and advocated for key issues within the marketing communications industry, including freedom of commercial speech, self-regulation, responsible advertising and sustainability, education, and professional development, including DE&I.

Learn more at northamerica.iaaglobal.org

PREMIER SPONSORS



Recognized as a leader in both the **2024 Gartner Magic Quadrant for Marketing Mix Modeling Solutions** and **The Forrester Wave™: Marketing Measurement and Optimization, Q3 2023 report**, Analytic Partners provides marketing measurement and Commercial Analytics to Fortune 500 brands around the globe. We provide adaptive solutions for deeper business understanding and right-time planning and optimization – for marketing and beyond. We turn data into expertise so our customers can create powerful connections with their customers and achieve commercial success.

Learn more at analyticpartners.com



Smartly is the AI-powered advertising technology company ranked as the leader in The Forrester Wave™: Creative Advertising Technologies. Our platform unifies creative and media to produce intelligent creative—dynamic, data-driven image and video assets optimized for seamless activation across channels. Brands manage, optimize, and scale high-performance campaigns in one place, achieving PwC-validated results, including a 5.5x return on ad spend (ROAS) and 42 minutes saved every hour.

We support 700+ brands and manage over \$6 billion in ad spend globally. With strategic partnerships across major media platforms—including Amazon, Google, Meta, Pinterest, Reddit, Snap, and TikTok—we help Fortune 500 companies deliver relevant advertising at speed and scale. Backed by deep media expertise and best-in-class customer support, we empower brands to maximize performance and drive real business outcomes.

Learn more at smartly.io



Vidmob helps advertisers turn their creative data into a marketing advantage. Vidmob's creative data platform allows marketers and agencies to analyze individual assets against a series of benchmarks (generic to the platform or custom-advertiser specific) and ensure that the right creative runs with the right campaigns at the right time both at the start and throughout campaigns. Vidmob's tech allows marketers to take the guesswork out of advertising and gives them the ability to build campaigns that have more impact, have greater efficiency, and are more predictable.

Vidmob has analyzed over 18T creative assets, can understand over 20,000 creative decisions and has produced over 40 proprietary AI-fueled models to help advertisers get the most out of every impression. The Vidmob platform allows for advertisers to maximize the benefits of creative data across an industry-leading 11 platforms (which covers c. 80% of the digital spend of most marketers).

Learn more at vidmob.com

ABOUT OUR SPONSORS

SUPPORTING SPONSOR



Monks is the global, purely digital, data-driven, unitary operating brand of S4 Capital plc. With a legacy of innovation and specialized expertise, Monks combines an extraordinary range of global Marketing and Technology Services to accelerate business growth and redefine how brands interact with the world. From crafting tailored, outcome-focused campaigns to modernizing critical infrastructure for the ever-evolving digital landscape, Monks delivers solutions that engage audiences in real time, drive cultural relevance and sustain long-term impact—a tripartite approach that establishes it as a trusted partner to the world's most innovative brands.

Learn more at monks.com

FOUNDATIONAL SPONSORS



APR Consulting Co is a global marketing services company at the forefront of helping leading brands optimize investments across the content supply chain. With 25 years in the content and creative production space, APR is the world's largest advisory of its kind, helping marketers deliver exponential value on their creative investments. Through our integrated approach and world-class benchmarking -powered by ACERO™, the world's largest proprietary database of production investment - we drive innovation, improve production acumen, and increase return on investment for all our clients.

Learn more at aprco.com



ContinuumGlobal is a marketing services firm that helps brands like Google, YouTube, Waymo, Android, Kraken, Coinbase, etc. deliver personalized, data-driven customer experiences at scale. Specializing in engagement marketing, CRM, and AI-powered solutions, we combine deep expertise in data analytics and marketing tech to optimize performance and drive measurable results. Headquartered in San Francisco with two operations centers in India, and offices in the US, UK and Canada, our 800+ professionals support global marketing execution with speed and precision.

Learn more at continuumglobal.com

ABOUT WINTERBERRY GROUP

ABOUT US



Winterberry Group is a growth consultancy specializing in the intersecting disciplines of marketing, advertising, technology, data and analytics. We collaborate with stakeholders across those ecosystems—agencies, service providers, technology developers, brands, publishers and investor groups—leveraging deep industry expertise to build actionable strategies that spur growth and drive the creation of real and lasting stakeholder value.

WINTERBERRY GROUP SERVICES

GROWTH STRATEGY

We work with clients to identify core competencies, evaluate alternatives and build comprehensive, actionable roadmaps to growth

OPERATIONAL DESIGN

We guide agencies, marketing solution providers and brand-side marketing practices through transformations aimed at activating “build” and “buy” strategies, capitalizing on disruptive opportunities presented by data and technology—and achieving lasting competitive advantage

MERGERS & ACQUISITIONS

We leverage our industry knowledge to help financial investors make sound, value-driven investment decisions—supporting commercial diligence, buy-side target identification and pre-exit growth planning/positioning needs

MARKET INTELLIGENCE

We maintain an active research and publishing practice that gives our consultants direct access to insights from senior industry executives and complements our client engagements

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