TVN & Ascentinel Study

In Association with the *IAA*

The future of Branded Content

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Study Overview

This survey explores current **market dynamics and trends** in **branded content**, highlighting key drivers and the **impact of Personalisation and AI on the industry's growth and evolution.**

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Sections

- Market size and growth
- Key market drivers metrics
- Trends and Innovations

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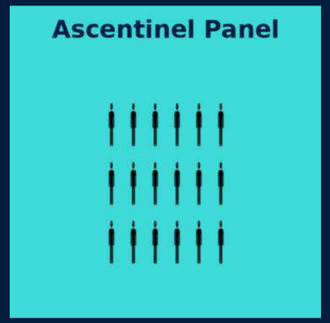
ASCENTINEL SURVEY PANEL



Survey comprised of video **decisionmakers f**rom
Clients (Brands), Media Owners and Agencies

Research conducted in July 2025 via face- to-face interviews & online surveys

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Branded Content...

addressing the
Attention Gap!

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Exec Summary

- **Market** set to **grow** by over ***10%!***
- ***Video*** the dominate format as the most engaging format and addresses the market challenge of ***lower attention spans***
- Market overwhelmingly states that ***shorter content*** is the most effective
- ***Paid Media*** is the larger distribution channel, however, ***Earnt and Owned*** also play a key role.
- ***Social*** is the core media platform within Paid Media

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Exec Summary

- ***Personalisation*** to play a more central role as ***data and AI enable*** this and there is growing client demand for this
- ***AI*** also set to increase the value ***human input and content authenticity*** as content becomes more generic through mass AI led production
- ***Time spent and Brand Lift studies*** are the core ways the market measures the success of branded content campaigns
- ***Role of influencers and brand ambassadors*** set to become more central to Branded Content activity

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KEY QUOTES

*"Branded Content has a different role which is driving engagement and education… **Combining branded content and traditional media has a multiplier effect** and also enables brands to reach wider, more diverse audience with higher engagement levels."*

Head insights - Agency

*"**Video drives emotion in a way nothing else can**."*

Director Branded Content - Agency

KEY QUOTES

"**Personalisation and distribution are the key trends**…"

Head of Media - Brand

"*Content market will split between* ***AI driven content and high end human created content*** *which is more crafted and tailored to the clients needs and objectives.*"

Head of International – Publisher

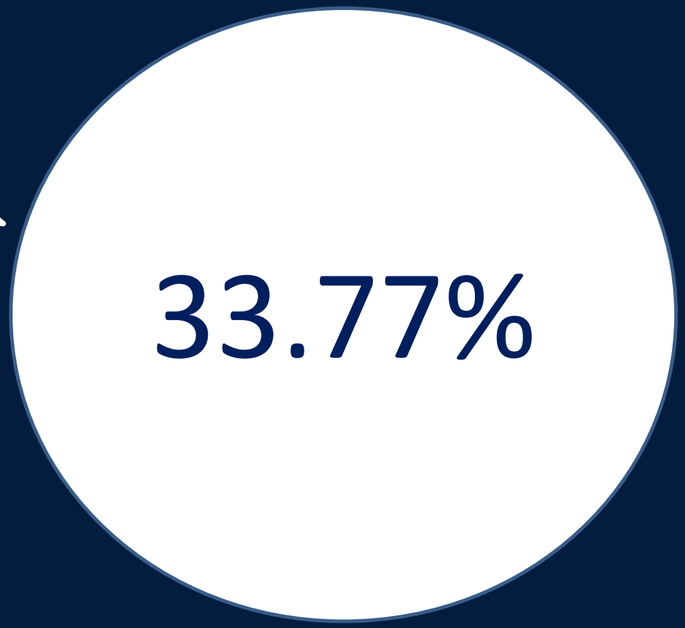
MARKET SIZE AND GROWTH

Market set for a return to growth!

By what percentage will branded content budgets increase or decrease in the next 12 months?

Creation and distribution taking a large share of budget

What % of your overall media and production budget is allocated to the creation and distribution of branded content?



"Depends on the type of content created but roughly 20%"

Associate Director – Publisher

"20%, consistent for the last 10 years. can drop during market pressures."

Strategist – Agency

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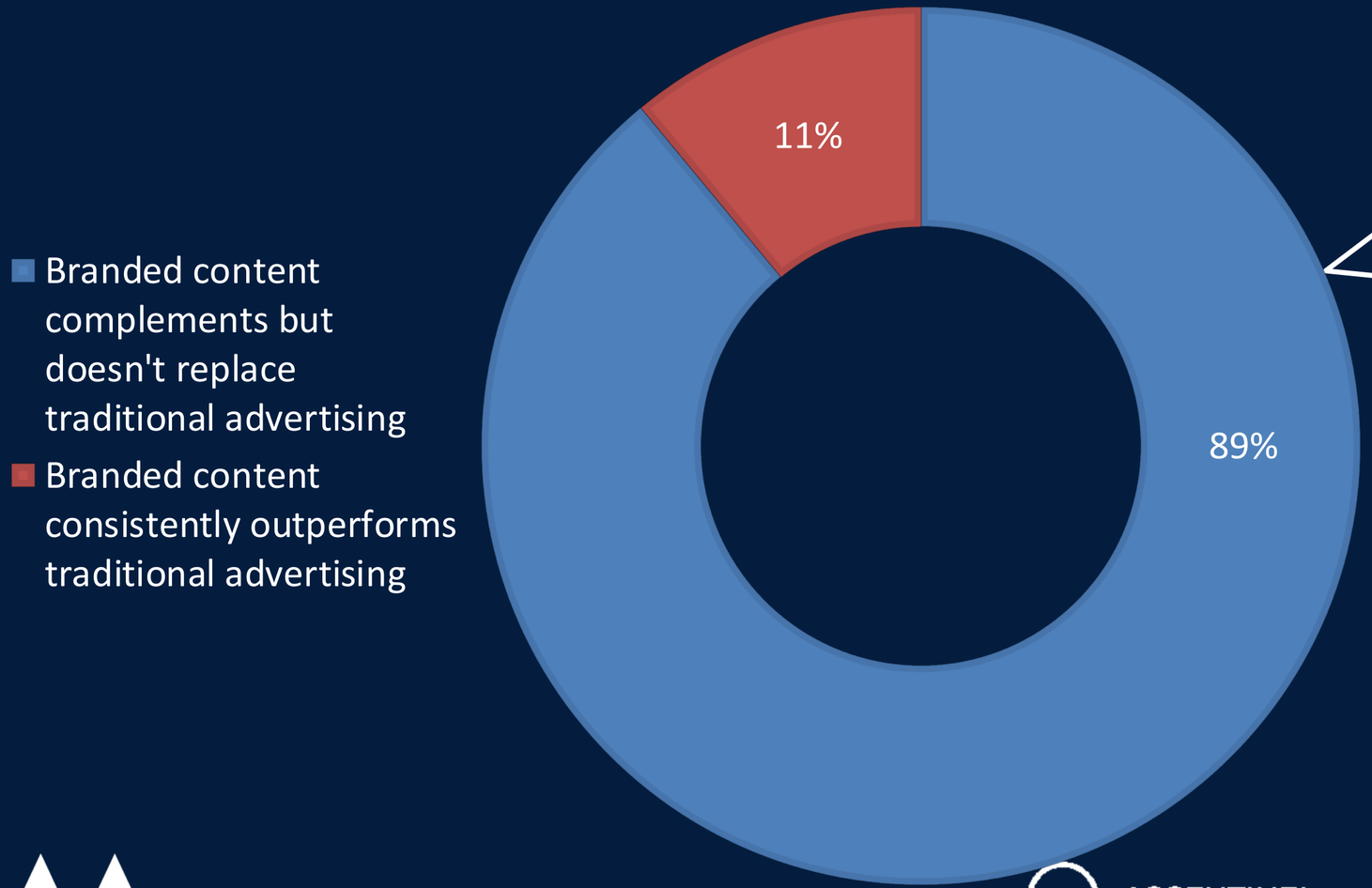
Branded Content complements Traditional Advertising

Which statement best reflects your view on branded content versus traditional advertising?



"Branded Content has a different role which is driving engagement and education. It works really well for high end campaigns, that reach and influence audiences. Combining branded content and traditional media has a multiplier effect and also enables brands to reach wider, more diverse audience with higher engagement levels..."

Head insights - Agency

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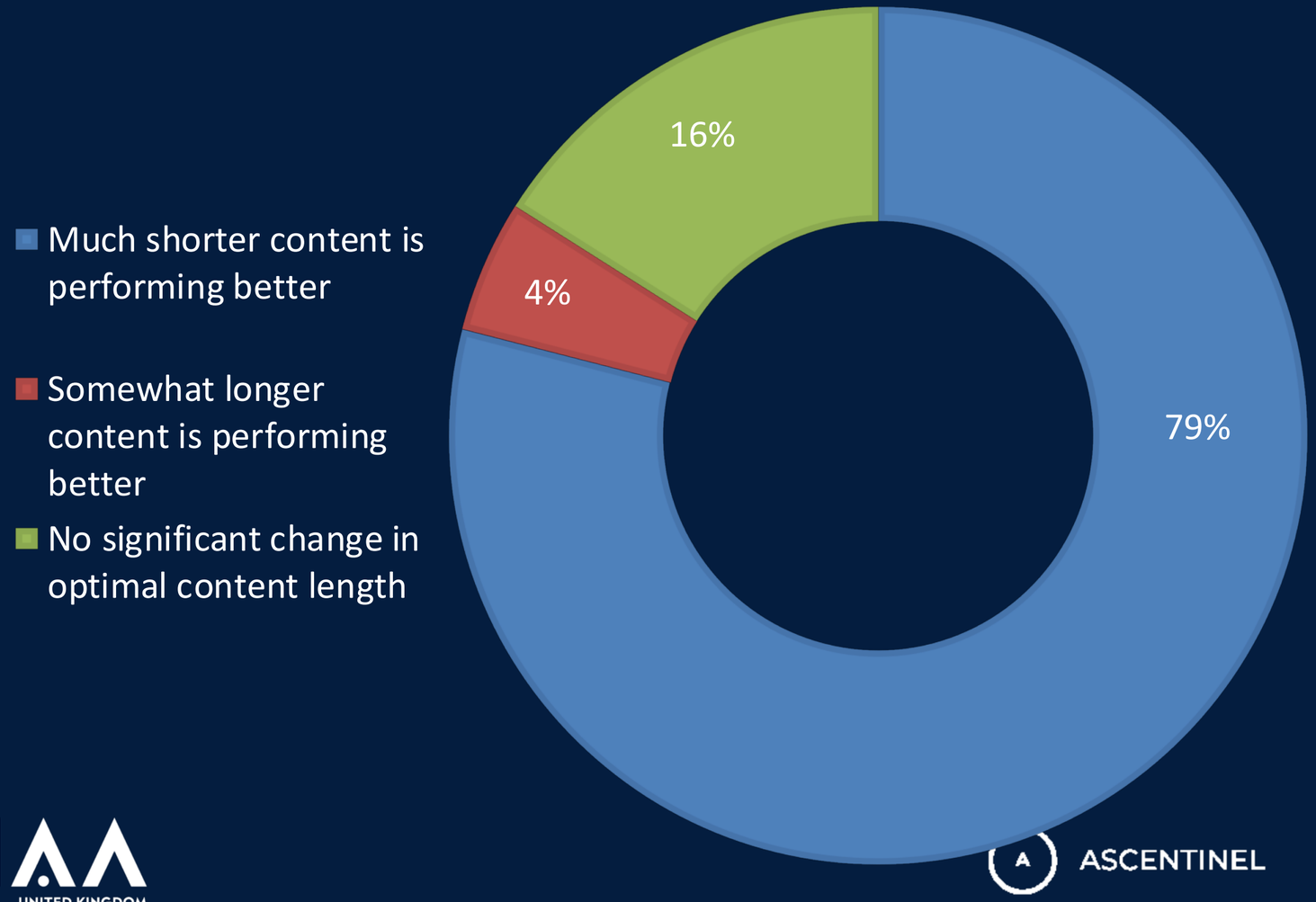
KEY MARKET DRIVERS & METRICS

Shorter content still seen to be more effective

How has the ideal content length changed in the last 2 years?



"Formats are getting longer as... audience looking for something that is more in depth and authentic..."
Director Branded Content - Agency

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Video the dominant branded content format

Rank which branded content formats drive the best results for your objectives?

“Video drives emotion in a way nothing else can.”

Director Branded Content - Agency

“Over 2 mins can really tell a story which is what branded content is there to do. It also enables creative to tell the story over the time required to tell the story effectively. No time constraints like you get with a 1 min format!“

Associate Director - Publisher

Rank	Ad Format
1	Video content (under 2 minutes)
2	Video content (over 2 minutes)
3	Social Media Posts
4	Short Form Articles
5	Animation/visualisation
6	Long-form Articles
7	Podcasts

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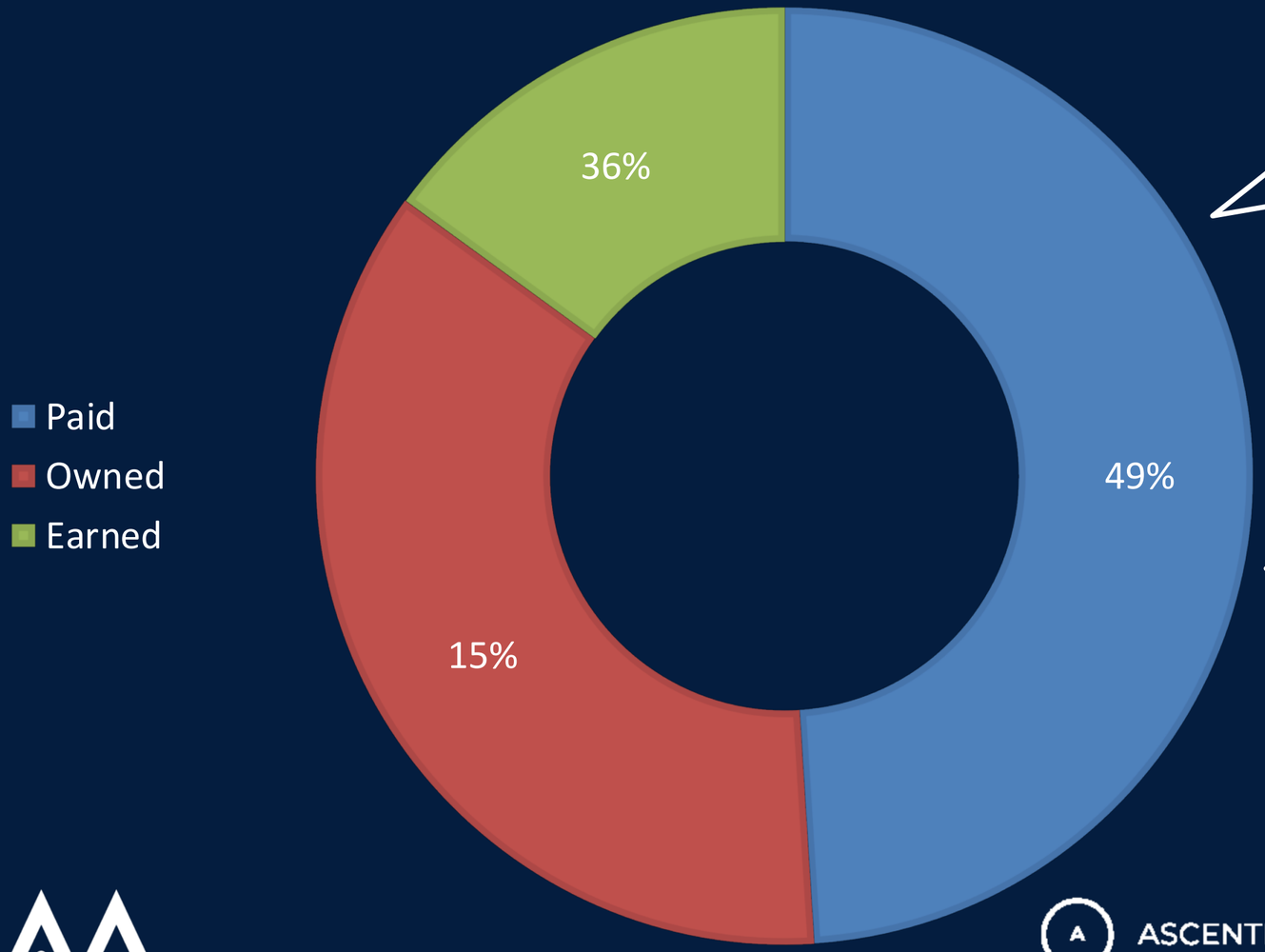
Paid media the larger channel but all channels have a role

Which distribution channels deliver the best ROI for your branded content?



"Content needs paid media support in order to be discovered and drive word of mouth.
Earnt media is also very good but the content needs to be really strong for it to work.
Social is the core channel a it is scalable, can reach the specific audience and the environment suits branded content."
Head of International – Publisher

"Social media is so great as the environment, within a walled garden is strong for story telling especially as the audience has opted in to this, and the paid element is a real driver of this delivers reach and scale."
Director Branded Content - Agency

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Time Spent and Attention are the core success metrics

How do you primarily measure branded content effectiveness?

Rank	Ad Format
1	Time spent/attention metrics
2	Brand Lift Studies
3	Lead Generation
4	Sales Conversion
5	Content Testing
6	Net Promoter

"Brand lift is the key measure as that at its core is what brands are trying to achieve. Engagement and time spent are also key, tangible metrics to show how the campaign worked."

Head of International – Publisher

"For the brands, the brand lift studies are key. For people executing the campaign the engagement metric is key."

Director Branded Content - Agency

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KEY TRENDS AND INNOVATIONS

AI having low level impact, so far…

How is AI currently affecting your branded content creation?

Themes

Currently enabling more low level production, delivery in areas such as, translation, AI audio, etc.

Also, in research and ideation for branded content.

Strong potential in personalisation, esp. as there is real client demand for this!

"Seeing it in post production, such as subtitles. Not seeing it used extensively by clients in branded content creation."

Head of International - Publisher

"Brands need to be far more authentic and in ways that align with their customers. AI will create so much content you need to add value to get cut through."
Head of Strategy - Agency

"Currently we use AI to help generate copy and campaign ideas. The actual content creation is still done by us without AI…"

Marketing Director - Brand

"Noise is the biggest thing at the moment. "

Head of International - Publisher

"AI does a lot of the ideation and skamping to help the creative process, so useful from an efficiency and speed POV. And great for testing at scale."

Global Strategist – Holdco Agency

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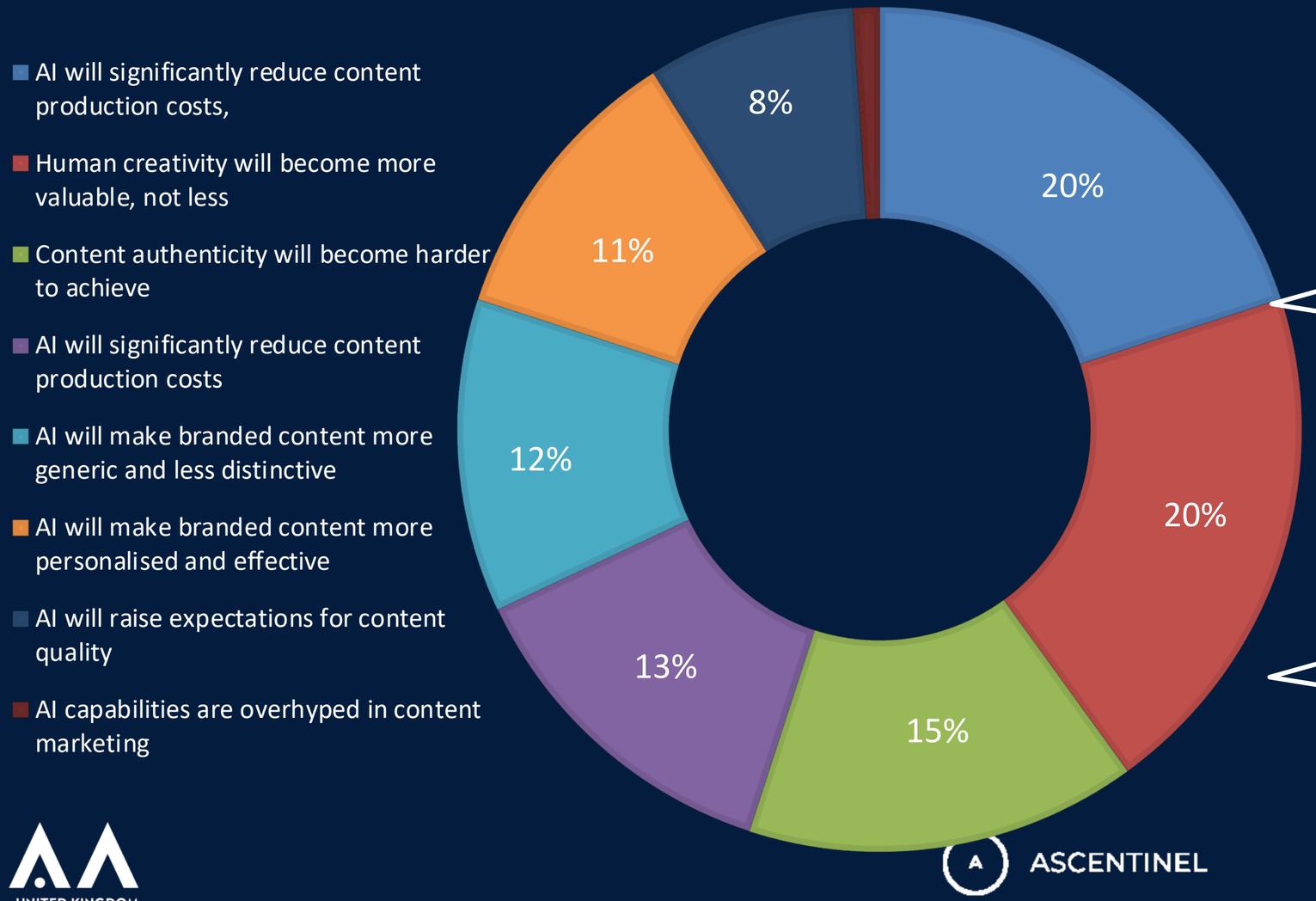
Market divided on the role of AI

Which of these statements about AI and branded content do you agree with?



"Content market will split between AI driven content and high end human created content which is more crafted and tailored to the clients needs and objectives."

Head of International – Publisher

"Authenticity is key and that is where the challenge with AI lies, especially with regards branded content which is both a peer to peer format and leverages highly tailored content."

Director Branded Content - Agency

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Personalisation and distribution are the key future trends

What do you see as the key future trends in branded content?

Themes

Personalisation and distribution seen as the core opportunities, e.g. editing and sharing content.

But also mistrust around AI and respondents believing brands will need to be even more authentic in the future to counter generic AI content

Content predicted to become even shorter and more shocking in the future due to AI

"Personalisation and distribution are the key trends. e.g. taking content already created and then cut up to suit specific audience and platforms to drive reach and suitable content to specific audiences…"
Head of Media - Brand

"Branded content will grow and become more diverse, e.g. growing role in travel vertical. People will become more comfortable and engaged in branded content and so brands will get closer to it and it will be more core to what they do "
Head of Strategy - Agency

"Shorter, more shocking content, higher use of influencers / ambassadors…"
Head of International - Publisher

"Purpose driven content to drive deeper connection with brands and deeper engagement. Personalisation to individuals, which will be more easily achieved through AI. "
Associate Director - Publisher

"Animation to become more key and used by brands… "
Head of Strategy - Agency

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DRIVING REVENUE GROWTH USING CUSTOM RESEARCH & DIGITAL TRANSFORMATION

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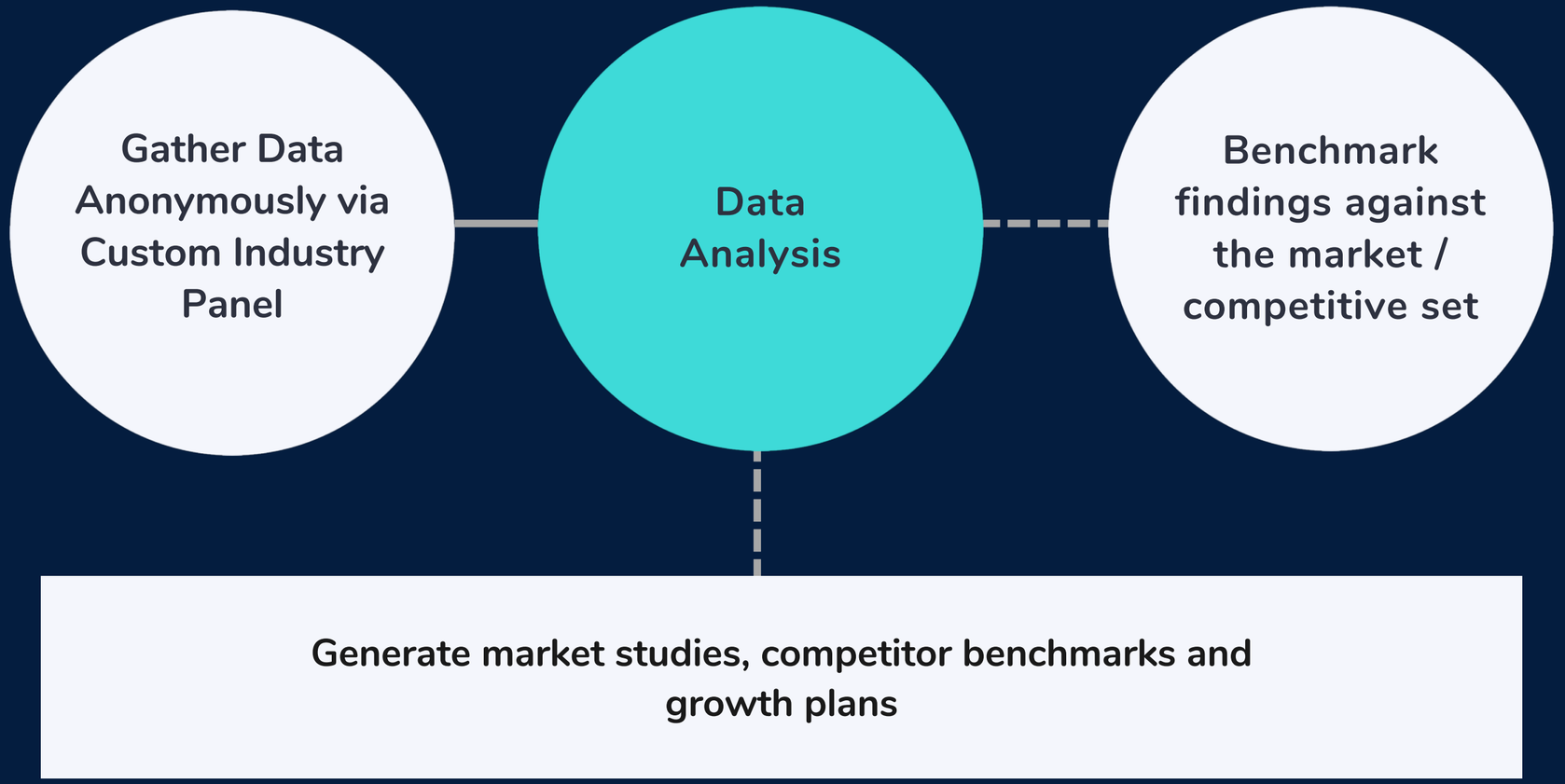
THE ACSENTINEL PROCESS



FURTHER QUESTIONS

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