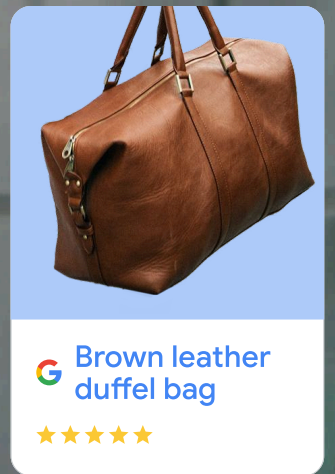


Think with Google

Back to Business Essentials



The CMO must-read for H2

Introduction

Businesses are undergoing a once-in-a-lifetime transformation, driven by AI. The CMOs who are leading the pack on AI transformation are at the center of this enterprise reinvention, becoming the go-to C-suite leader for CEOs and boards.

Leading CMOs are addressing both the possibilities of AI and the seismic shift in consumer behavior. Consumer journeys today are anything but linear. People move fluidly across *searching, streaming, scrolling, and shopping* — often simultaneously. And with the evolution of these consumer journeys, the marketing funnel that worked for decades has lost relevance.

The possibilities offered by AI are near-infinite, but the practical barriers to execution can be just as daunting. The Think with Google team has distilled lessons from the first half of 2025, bringing you key insights across the *what* and the *how*, from top CMOs, agency leaders, Boston Consulting Group (BCG), and leaders within Google who are building the AI solutions of the future.

Inside, you'll find actionable insights on:

- Moving past the funnel and meeting the needs of predictably unpredictable consumers.

- Capitalizing on opportunities created by the future of advertising — a future that is here, now.

- Closing the gap between experimentation and impact by scaling AI for media, creative, and performance.

- Tapping into culture and communities by leveraging YouTube creators as strategic partners.

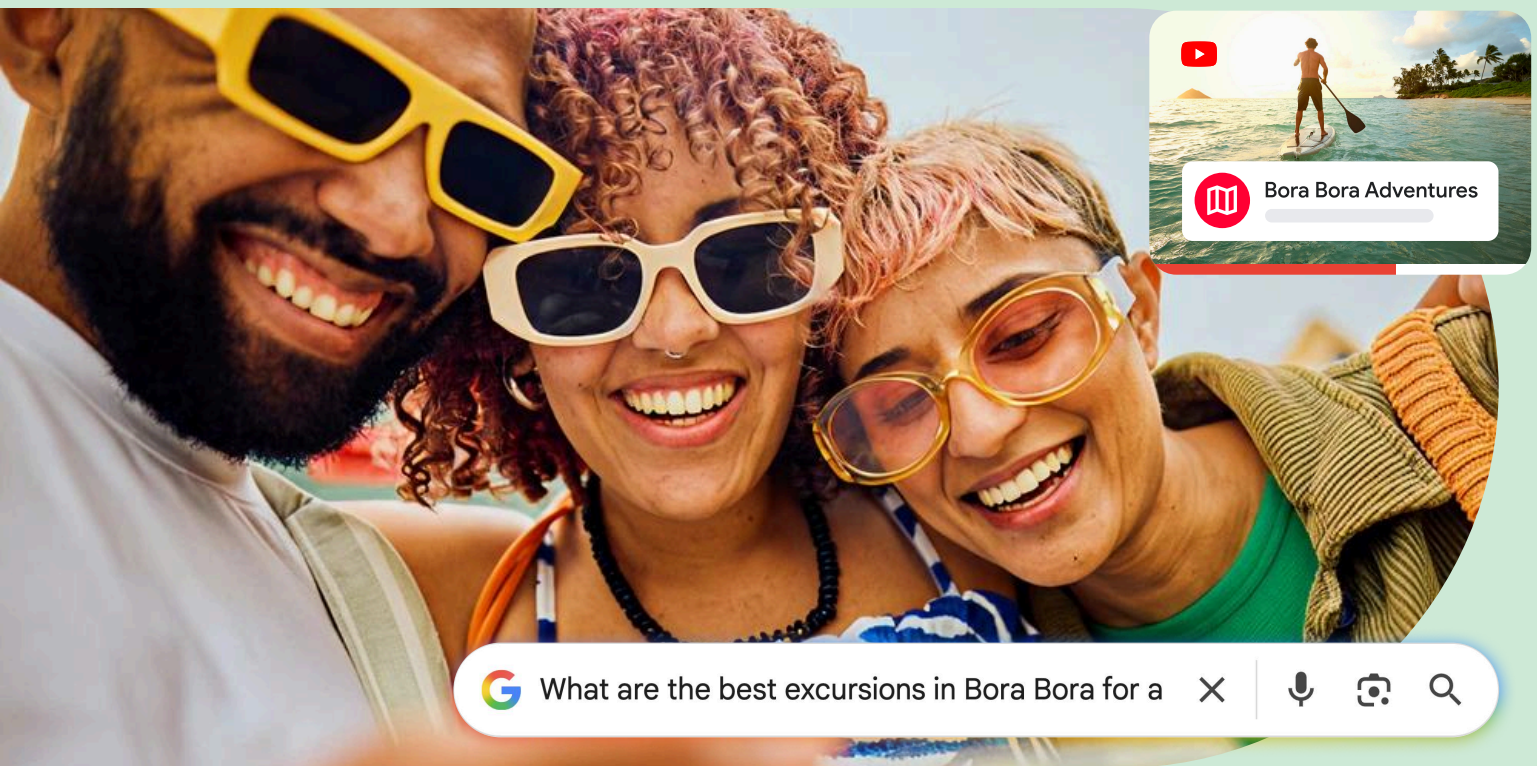
- Building AI strength across data, content, and agentic capabilities, and driving performance using the Google Ads Power Pack.

The bottom line is clear: We are at a turning point. We hope this report helps you plan with greater confidence — and take action with clarity.



Table of contents

1	The predictably unpredictable consumer	04
2	The future of advertising	09
3	Scaling creative, media, and performance with AI	13
4	Creators as strategic partners	21
5	Your action plan: Future-ready, now	26



Chapter 1

The predictably unpredictable consumer

Executive Summary

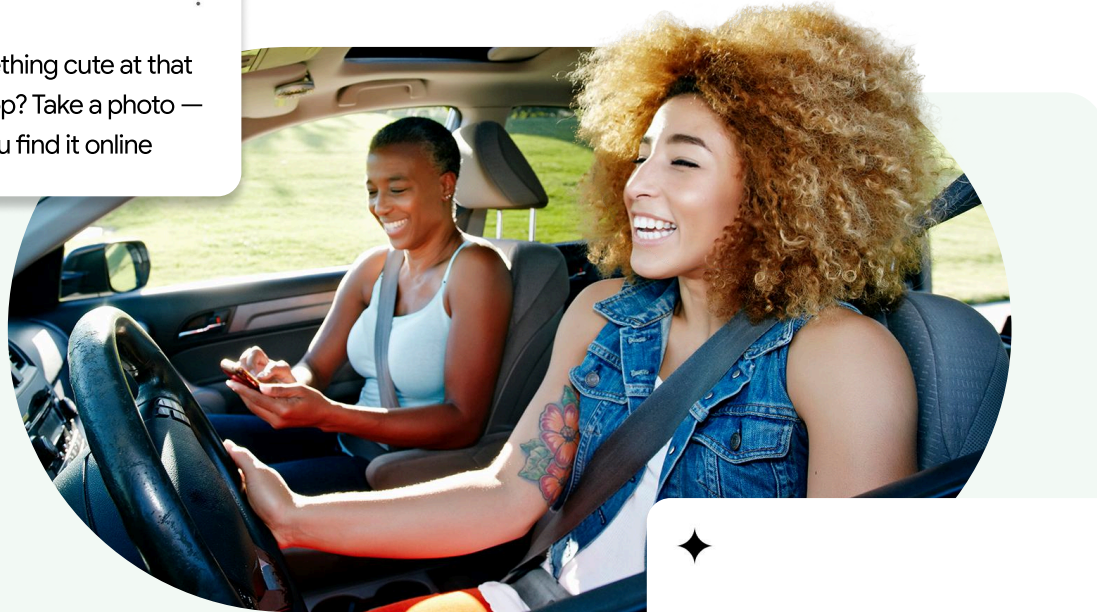
Today's consumer journeys are nonlinear, with people searching, streaming, scrolling, and shopping across devices, simultaneously. Here's what to keep in mind as you adapt your plans.

- The traditional funnel no longer reflects how consumers make decisions. Journeys are nonlinear and depend on behavior, context, and immediacy of need.
- Influence over consumer decisions is a function of attention, relevance, and trust — not just visibility or reach.
- Marketers can use influence maps to meet consumers where they are and adapt their messaging based on customer persona and context at each stage of the journey.
- It's important to be where your customers are: A majority of shoppers (61%) interact with 5+ touchpoints in their online purchase journeys;¹ Google or YouTube are present in 86% of those journeys.²
- AI can help prioritize influence pathways to improve effectiveness and efficiency of marketing investments.

On average, consumers interact with over 130 mobile touchpoints a day.³ And that's just one device. There are also connected TVs, laptops, smartwatches, tablets, and more. Consumers today move seamlessly and simultaneously on these devices across searching, streaming, scrolling, and shopping. Our research with BCG reveals that these 4S behaviors have fundamentally reshaped how consumers discover and engage with brands.



See something cute at that beach stop? Take a photo — I'll help you find it online



Looks like a flowy linen set — I can send some great local options that'll ship to your hotel

Farewell, funnel

A linear funnel no longer reflects how consumers make decisions. Instead of moving through predictable stages, they jump between behaviors, often repeating or skipping steps. Our research found that consumers follow multiple, nonlinear pathways shaped by behavior, context, and immediacy of need.

A journey that starts on the phone while you are commuting, moves to a laptop at work, may intermittently involve the phone, and then resumes on a connected TV later in the evening while you are also using the phone. Forcing customer journeys into a linear funnel risks misleading strategy, misallocating resources, and delivering irrelevant messages. Instead, marketers need a more flexible framework that better aligns with consumers' actual journeys.

Be where your customers are and adapt how you show up

The rise of the 4S behaviors unlocks new opportunities to discover, engage, influence, and convert consumers.

As a first step, instead of planning along a funnel, marketers need to be *where* their customers are, in real time. A majority of shoppers (61%) interact with 5+ touchpoints in their online purchase journeys; Google or YouTube are present in 86% of those journeys.⁴ This is higher than any other online platform.⁵

Influence is determined by three factors:

- 1 The level of attention a consumer gives at any given moment.
- 2 The relevance of the content to the consumer's needs.
- 3 The consumer's degree of trust in the touchpoint or platform.



I'm heading to Siargao — what's the best surf gear I can get locally?



Got you! Here are top-rated gear picks from YouTube creators, local surf shop reviews, and what's trending nearby. Want to watch a quick rec from a pro?

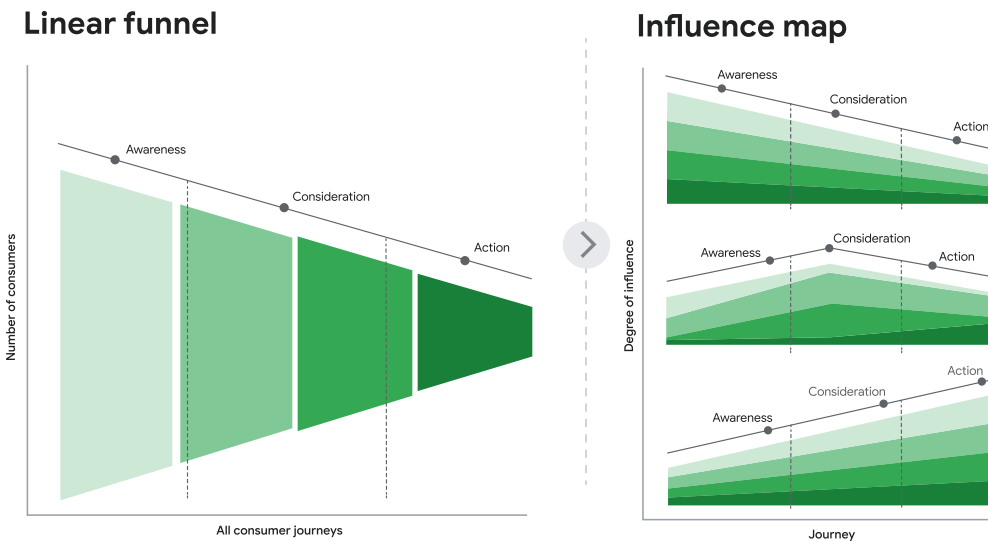
The next step is *how* you influence your customers. Influence is a brand's power to meaningfully impact consumer decisions and outcomes, accelerating the journey from discovery to decision. More than just visibility, influence is determined by three factors: the level of attention a consumer gives at any given moment; the relevance of the content to the consumer's needs; and the consumer's degree of trust in the touchpoint or platform. These factors, combined with reach, should guide marketers on which touchpoints to use and how to show up in each.

To meet your customers where they are and in the right way, we recommend "influence maps" that reflect how consumer journeys have changed. Influence maps can help marketers plan for different customer personas and journeys.

A spontaneous, digitally savvy shopper might see an ad for a product while streaming YouTube, then encounter a prominent display in-store, search for product reviews online, and finally make the purchase soon after. A budget-conscious shopper might start with a quick online search to compare options. They may later recall one of the brands they liked while watching a creator's Short on YouTube and come back to search for the best deals online.

Marketers can define influence maps for the consumer segments they are most focused on, then use them to prioritize investments across the four behavior types. Using consumer research and AI, you can create maps that reveal which behaviors carry the greatest influence when a message reaches the consumer at each stage of their journey.

Understanding the predictably **unpredictable consumer**



Examples

- **Stream**
 YouTube enables purchases through shoppable ads
- **Scroll**
 Vertical live streams on the YouTube app enable discovery, consideration, and purchase on one platform
- **Search**
 Google Search helps shoppers find ideas and close the deal
- **Shop**
 In-store browsing sparks interest, while remarketing through Google Ads seals the purchase

Source: Based on BCG analysis

Take an expansive view of where AI can help

Success with influence maps will require a scaled approach to AI, not just to synthesize complexity but also to maximize the impact of your marketing investments. This starts with looking at your processes end to end and identifying where AI can play a role, such as in insights, measurement, media, or creative. Then, prioritize the top influence pathways where AI pilots can be strategically deployed.

For example, imagine you are a travel company. You've identified one key pathway to booking is from a travel blog to a YouTube destination video and onto your booking system. By utilizing AI here, you can analyze content from popular travel blogs and generate video ad scripts that align with the themes and destinations discussed on the different blogs, improving click-through rates and driving more qualified traffic to your booking platform.



Industry inspiration

Hilton

Zillennials are changing the travel-booking game. To capture these inspiration-led travelers, Hilton developed an AI-powered YouTube and Search strategy. This approach ensured relevant ads appeared throughout the customer journey, from inspiration — like F1 racing on YouTube — to booking intent. By connecting “in-the-moment” intent with the right creative, supported by solutions like broad match and Smart Bidding, Hilton saw double-digit incremental revenue growth last year, proving that connecting inspiration with intent can unlock significant new business.

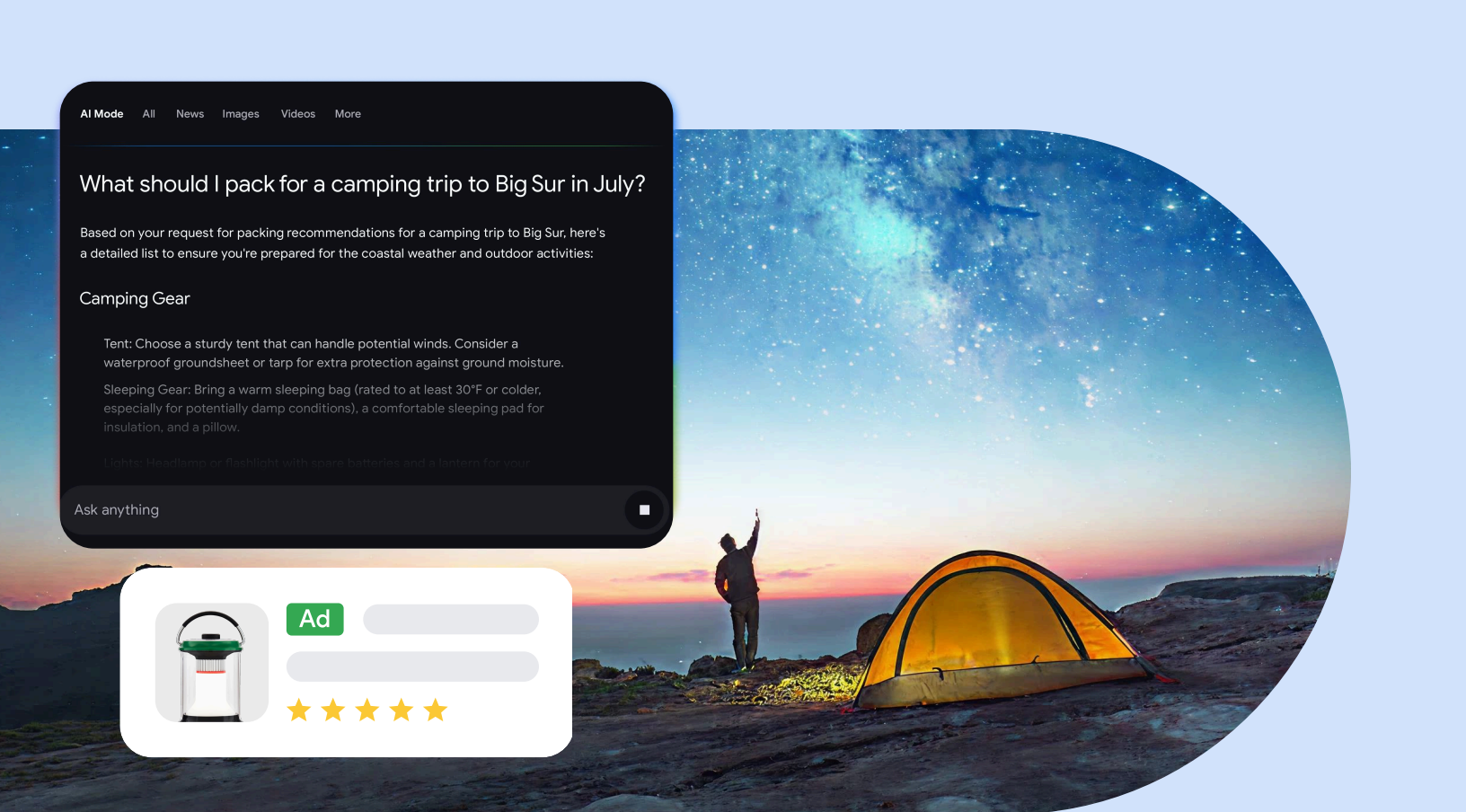
Rare Beauty

Founded by Selena Gomez to challenge beauty standards, Rare Beauty needed a smart strategy to reach a savvy Gen Z audience. Recognizing that consumers are increasingly using AI to find personalized answers, the Rare Beauty team leaned into AI-powered ad solutions to ensure the brand showed up in as many places as possible. By incorporating YouTube in their Search strategy, they saw significantly higher Search volume from both new and existing customers, ultimately driving 7X return on ad spend.



→ What's next

In addition to changing consumer behavior, AI is reshaping advertising and marketing, creating new growth opportunities for businesses.



Chapter 2

The future of advertising

Executive Summary

The future of advertising, fueled by AI, isn't coming — it's already here. Here are the innovations you can use to influence your consumers as they search, stream, scroll, and shop.

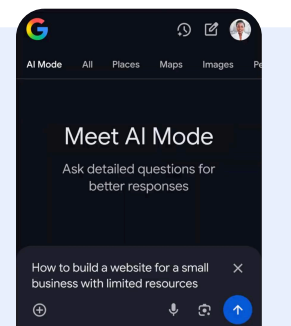
- AI is reshaping advertising through AI-powered discovery, multimodal understanding, and agentic action.
- Discovery is evolving from information to intelligence, with AI Overviews and AI Mode in Search enabling complex, multistep interactions and driving query growth.
- Multimodal capabilities, like Google Lens and Try On, capture intent across text, image, video, voice, and real-world inputs — and give us next generation signals of intent.
- Shoppers and marketers can now leverage agentic technology, such as new checkout experiences, which autonomously complete tasks for shoppers.
- These innovations now allow marketers to reach consumers with personalized, privacy-safe, and performance-driven ads. These are ads that don't interrupt and appear at just the right moments, even the ones you couldn't predict.

We see over 5 trillion searches on Google annually,⁶ and YouTube is the leader in reach and in streaming by watchtime.⁷

Advertising is undergoing its biggest shift yet, driven by AI. We see the change unfolding across three key fronts, each of which opens up new opportunities for advertisers.

- 1 AI-powered discovery:** Discovery is evolving from information to intelligence as AI capabilities allow users to have complex, multistep interactions with Search.
- 2 Multimodal understanding:** How we discover and shop is transforming, as we can now capture intent across visual, voice, and real-world inputs with new AI features.
- 3 Agentic action:** Agents will soon be able to assist shoppers in a range of tasks, including completing checkout on their behalf.

AI Mode: Early testers in Search Labs have been asking much longer queries, two to three times the length of traditional searches,⁹ allowing us to go from understanding *what* people are looking for, to understanding the *why* behind it.



AI in Search: Going beyond information to intelligence

AI-powered discovery

The nature of discovery has evolved, with users asking more complex questions in natural language and searching, not just with text but with visual, voice, and real-world inputs. As the largest discovery platform, we see over 5 trillion searches on Google annually,⁶ and YouTube is the leader in reach and in streaming by watchtime.⁷ Google is shaping the evolution of how users discover with the power of AI built into our user products across Search, YouTube, Maps, Gmail, Chrome, and more.

AI Overviews are a prime example of this evolution. They deliver deeper context and comprehensive responses directly within Search results. As more people use AI Overviews, they're increasingly happier with their results, and they search more often. In our biggest markets, like the U.S. and India, AI Overviews are driving over 10% growth in the types of queries that show them.⁸

As we've rolled out AI Overviews, we've heard from power users who want an end-to-end AI Search experience, so we built **AI Mode**. It expands what AI Overviews can do, with more advanced reasoning, multimodality, and conversational follow-ups. You can ask AI Mode much more complex

questions and have a back and forth with it. Early testers in Search Labs have been asking much longer queries, two to three times the length of traditional searches,⁹ allowing us to go from understanding what people are looking for, to understanding the why behind it.

The adoption of these new ways to Search opens up significant opportunities for businesses. With AI Overviews, [we're showing more links and links to a wider range of sources](#). When people click from search-result pages with AI Overviews, these clicks are higher quality for websites, meaning that users are more likely to spend more time on the sites they visit.

This also opens up new opportunities for advertisers. We have expanded ads within AI Overviews to desktop in the U.S., and to select English-speaking countries on mobile. We're also experimenting with ads in AI Mode. If someone asks, "How to build a website for a small business with limited resources," they will get a step-by-step guide with tips and hints, and ads that help them find what they're looking for — faster and integrated right into the response. The approach is designed to help people discover information more seamlessly, while being privacy safe and performance driven.

Multimodal understanding

Intent is no longer limited to typed queries. We now have next-generation signals of intent: People can search in text, images, video, voice, and even the real world.

For example, **Google Lens** is at 25 billion searches a month,¹⁰ and one in every five Lens searches shows commercial intent.¹¹ **Circle to Search** lets users instantly search anything on their phones with a simple gesture, without ever switching apps. Younger users who have tried Circle to Search before now use it to start more than 10% of their searches.¹²

For shoppers, a new experience brings together Gemini capabilities with our Shopping Graph to help them browse for inspiration, think through considerations, and narrow down products. The Shopping Graph now has more than [50 billion product listings](#), from global retailers to local shops, each with details including reviews, prices, color options, and availability — with [over 2 billion listings refreshed every hour](#).



Google Lens is at 25 billion searches a month,¹⁰ and one in every five Lens searches shows commercial intent.¹¹

Let's take the journey of a shopper who tells AI Mode they're looking for a cute travel bag. It will understand that they're looking for visual inspiration and show them a beautiful, browsable panel of images and product listings personalized to their tastes. If they want to narrow their options down to bags suitable for a trip to Portland, Oregon, in May, AI Mode will start a query fan-out, which means it

runs several simultaneous searches to figure out what makes a bag good for rainy weather and long journeys, and then use those criteria to suggest waterproof options with easy access to pockets. These features will roll out in the U.S. in the coming months.

Another new feature, now available in the U.S., allows users to virtually try on billions of apparel listings, just by uploading a photo. When you're shopping for shirts, pants, skirts, and dresses on Google, simply tap the "try it on" icon on product listings. From there you can upload a full-length photo of yourself, and within moments you'll see how that wedding-season maxi dress or playful shirt for your next vacation looks on you.

And starting this fall in the U.S., shoppers will be able to explore shoppable outfit and room inspiration right from AI Mode — whether you're looking for style inspo for a garden party or design ideas for a bedroom. Our vision-match technology will generate a range of options for your query, using products in the Shopping Graph to show listings for visual matches we think you'll like.

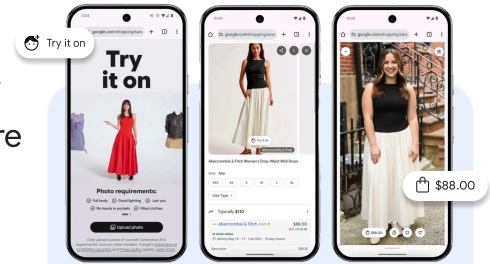
Google Search is already a powerful platform for capturing, comprehending, and addressing intent at incredible scale. Multimodal capabilities give us more information to help your business show up when and where consumers are open to discovery and ready to decide.

Agentic action

Agentic technology is designed to anticipate needs, learn from data, and autonomously execute tasks, both for consumers and marketers. At Google I/O 2025, we shared new innovations that demonstrate how agentic technology is bringing this to life for shopping.

For example, new agentic checkout experiences that can help shoppers easily buy a product at a price that fits their budget can reduce buying friction and boost sales. Shoppers can tap "track price" on any product listing and set the right size, color, and the amount they want to spend. The agent will notify the shopper when the price drops and can buy for the shopper once they confirm the purchase details and tap "buy for me." Behind the scenes, we'll add the item to the shopper's cart on the merchant's site and securely complete the checkout on their behalf with Google Pay. In the U.S., this agentic checkout feature will be rolling out in the coming months to product listings in the U.S., and the "track price" feature is now available.

The Google Try-On feature available in the U.S.



Multimodal capabilities give us more information to help your business show up when and where consumers are open to discovery and ready to decide.



New ways to shop

→ What's next

The future of advertising is inextricably linked to the possibilities created by AI. Get practical guidance on how you can use AI to make meaningful connections with consumers, drive creative impact, measure better, and make your teams future-ready.



Chapter 3

Scaling creative, media, and performance with AI

Executive Summary

To unlock the full potential of AI, companies must build connected systems that scale across media, creative, and measurement and are supported by investments in people and process. Here's what excellence in each dimension looks like.

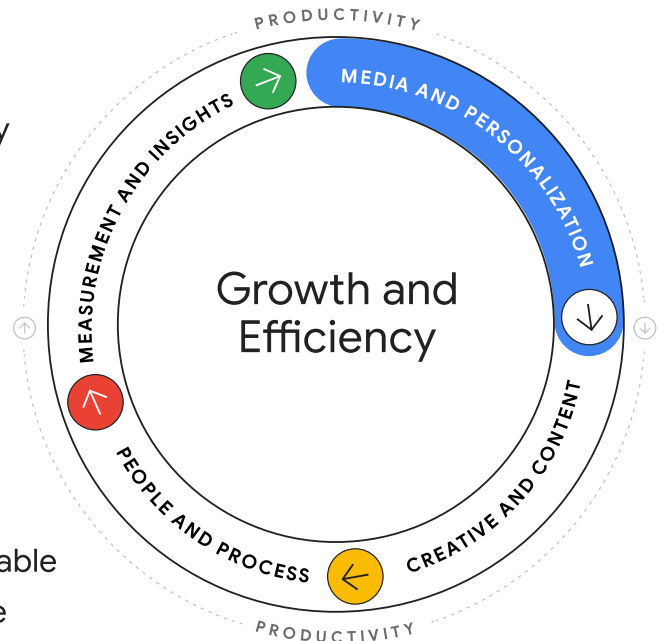
- **Media and personalization:** Build and improve media plans instantly, using AI-powered media engines to set the right budgets across channels and continually optimize them for the right audience.
- **Creative and content:** Launch relevant, personalized creative in real time with an end-to-end AI-powered creative workflow, and invest in custom AI capabilities.
- **Measurement and insights:** Apply AI to optimize in real-time, automating insights, reporting, and forecasting. Invest in the modern measurement tool kit: marketing mix models (MMM), data-driven attribution, and incrementality testing.
- **People and process:** Embed AI in the organization via process, training, and skills for reimagined AI-powered operations. Build your “magic circle” of cross-functional advocates.

AI is reshaping how marketing works, but levels of success vary. In our joint research with BCG, we found that amid accelerating AI adoption, maturity remains limited: 19% of companies are considered AI leaders, connecting workflows and testing AI-assisted decisions and personalization.¹³ To close the gap between experimentation and impact, brands must embed AI across four interconnected marketing functions: media and personalization, creative and content, measurement and insights, and people and process, forming an AI flywheel.

Achieving AI excellence is a journey, beginning with the essentials — the stage where companies are implementing and testing new AI tools to lay foundational groundwork. Scaling moves beyond experimentation to streamline operations and accelerate data-to-insight processes with AI. AI leaders constitute companies that are actively connecting workflows and testing AI-assisted decisions and personalization. A select few have reached the pinnacle, transforming their relationship with AI into a fully embedded flywheel.

Ninety-five percent of companies believe that there is value in a future workflow where AI is integrated seamlessly across use cases, and marketers provide oversight and innovative steering.¹⁴ To make this actionable and help you get closer to your goals, we've outlined the four pathways and what each stage of maturity looks like.

The AI-powered marketing engine



01 Media and personalization

Marketers reported a 24% increase in efficiency from using AI tools for media and personalization.¹⁵ But to truly unlock ROI, marketers need to know how to get the most out of their resources. Start by identifying which of these four stages reflect your current state.

Essentials



Start testing and adopting AI-powered campaigns.

Scaling



Scale AI-powered campaigns, using first-party data to improve relevancy.

Leading



Deploy AI to find and engage high-value audiences in real-time, across channels.

Transforming



Build and improve media plans instantly, using AI-powered media engines to set the right budgets across channels and continually optimize them for the right audience.

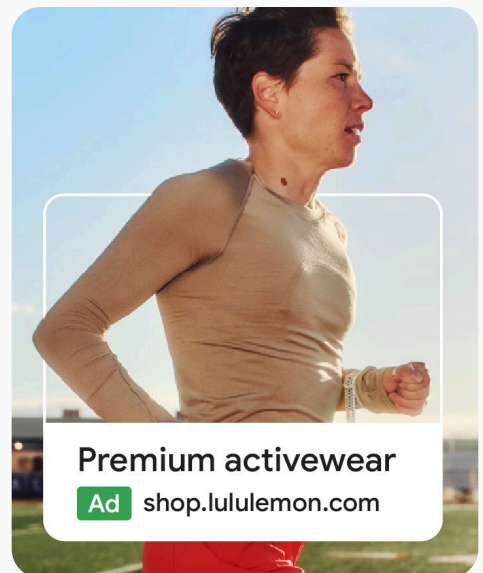
In particular, our research found that two strengths in media helped some marketers lead the rest: strong audience segmentation and fluid budget allocation. However, only 20% of companies currently use real-time audience segments powered by AI insights,¹⁶ and 35% of companies we surveyed are able to shift budgets around across platforms and channels, dynamically adjusting their marketing allocations to take advantage of new opportunities.¹⁷

Marketers can bridge this gap by using tools and workflows that allow for real-time segmentation and flexible cross-channel budget allocation. A great way to kick-start this is by using off-the-shelf AI-powered campaigns for faster testing and results.

Industry inspiration

Lululemon

To achieve its high-revenue growth goals, Lululemon implemented several AI-powered strategic workstreams, including an overhaul of its shopping campaigns. Taking this approach allowed the team to implement more strategic bidding and personalized ads; Shopping ads were tailored to different customer segments, with distinct approaches for new, undecided, and returning customers. This precision ensured the right message reached the right people at the right time, maximizing engagement and conversions. The brand's AI-powered approach led to impressive gains across revenue, reach, and acquisition — with an 8% boost in return on ad spend.

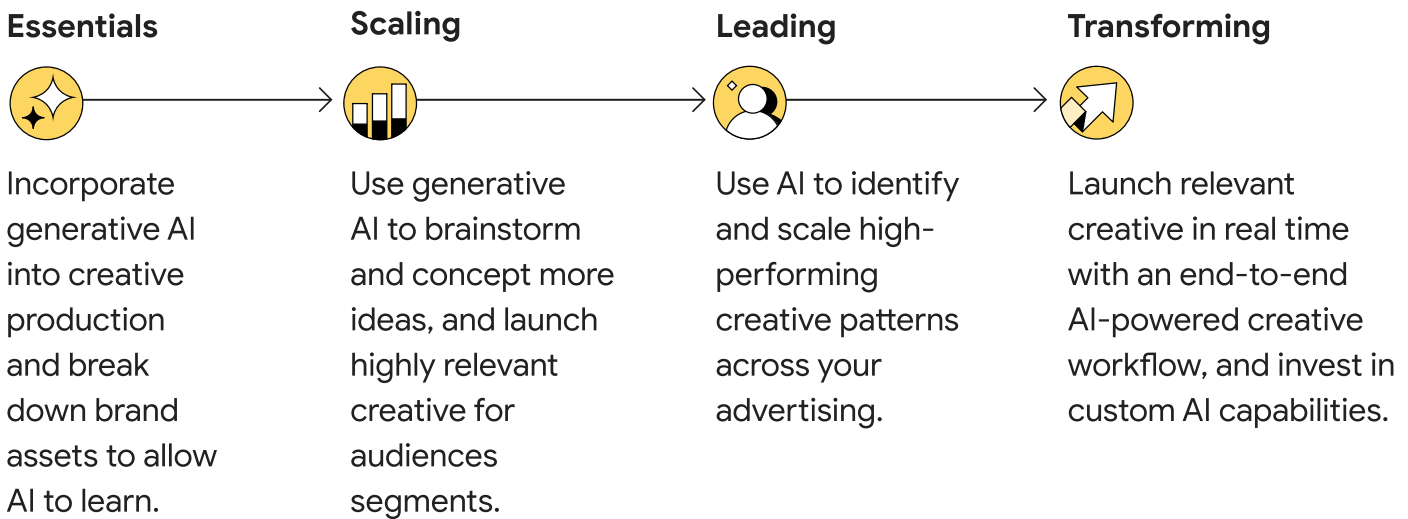


Bayer

Bayer used AI to increase the flow of high-value customers to the website for its digestive health supplement Iberogast. Drawing on website conversion tracking through Google Analytics 4 and online sales data, Bayer trained Google's AI to conduct value-based bidding to win more of these customers. The result? A 108% increase in high-value conversions.

02 Creative and content

AI offers myriad possibilities with creative and content, but scaling it has been a challenge. Leading brands embrace AI at every stage of the creative life cycle — from strategy and ideation to production and launch — enabling faster development, greater variation, and on-brand assets that anticipate trends and seasonal moments, while retaining full control over the process. Here are the stages of AI maturity for creative.



In particular, the volume and variation enabled by AI helps advertisers meet their customers as they search, stream, scroll, and shop. Marketers report a ~6X increase in creative asset volume by adopting AI for creative production.¹⁸

In Google Ads and Merchant Center, businesses can now generate on-brand assets that anticipate trends and seasonal moments, while maintaining full control over quality and brand safety. For example, if you're a fashion brand with a new workwear line and lack seasonal assets, AI can fill those gaps automatically.

Industry inspiration

Hatch

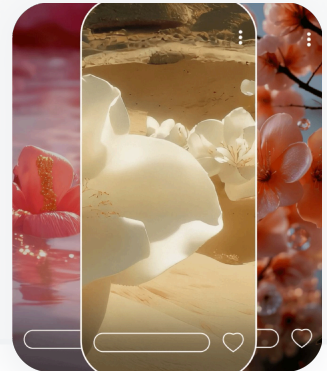
Sleep wellness company Hatch, teamed with agency **Monks**, executed a lightning-fast launch for its Restore 2 smart clock, bypassing lengthy market research. The team used Gemini to instantly create three target personas, forming the bedrock of “The Everything Machine” campaign. This AI-driven strategy, coupled with ImageFX producing 27 visuals from minimal sets, was a game changer, driving an 80% uplift in click-through rate, a 31% improvement in cost per purchase, and a 97% reduction in costs.

Touchland

To launch a new line of hair and body fragrance mists in a matter of weeks, Touchland and **Within** took [full advantage](#) of AI's ability to develop and scale ad creative. To start, the teams used Google's multimodal AI model, Gemini, to generate four audience personas and the brand's "Move Your Mood" sweepstakes concept, matching scents to travel destinations. It then used Imagen to rapidly generate high-quality 3D visuals for the campaign. The AI-powered approach reduced Touchland's timeline for visual assets by 90% and overall production costs by 70%.

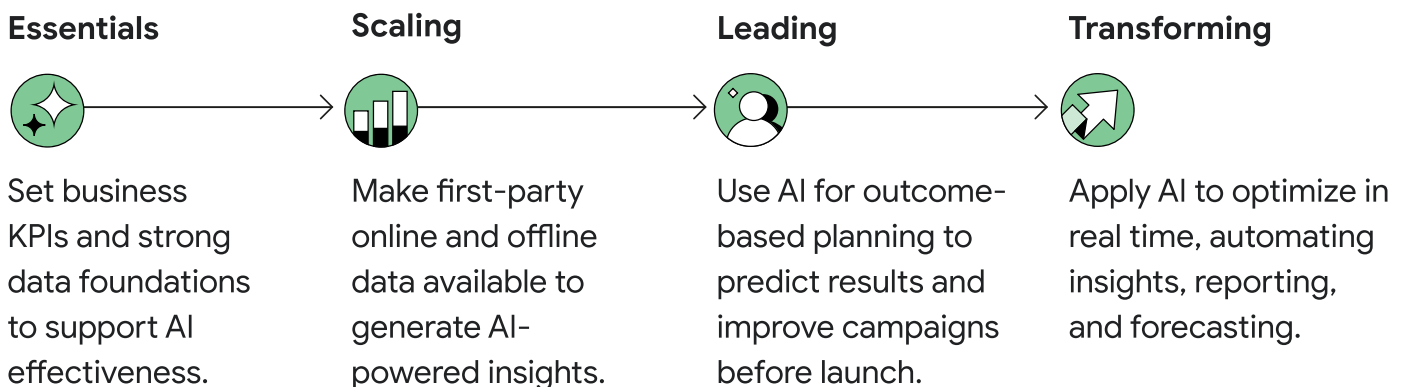
34%

campaign
conversion rate



03 Measurement and insights

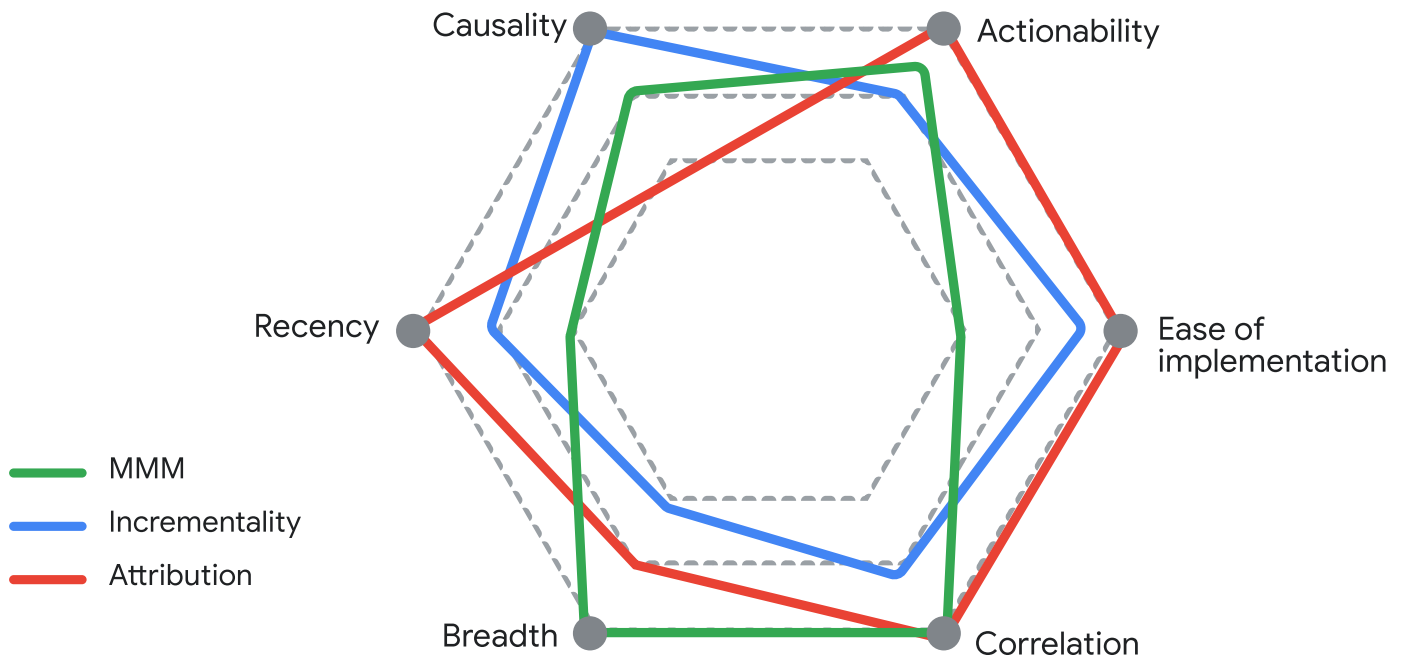
So, you've set up your AI-powered campaigns and you're using AI to build and scale your creative. Now, it's time to measure. According to our research, measurement and insights is the pathway with the largest headroom for AI implementation, with only 9% of companies having reached leading capabilities.¹⁹ What does the journey to AI excellence look like?



To fully take advantage of AI-powered measurement, marketers need to simultaneously invest in the modern measurement tool kit: marketing mix models (MMM) for cross-channel measurement; data-driven attribution for intelligence on what's driving performance; and incrementality testing to see what's working and where to improve.

Each of these approaches are widely used by marketing teams across the globe on their own, but the real magic happens when all three are used together. Today, 46% of global senior marketing analytics professionals report that their organizations utilize all three core measurement solutions (i.e., incrementality experiments, MMMs, and attribution solutions) to measure media effectiveness.²⁰

Measurement approaches by strength

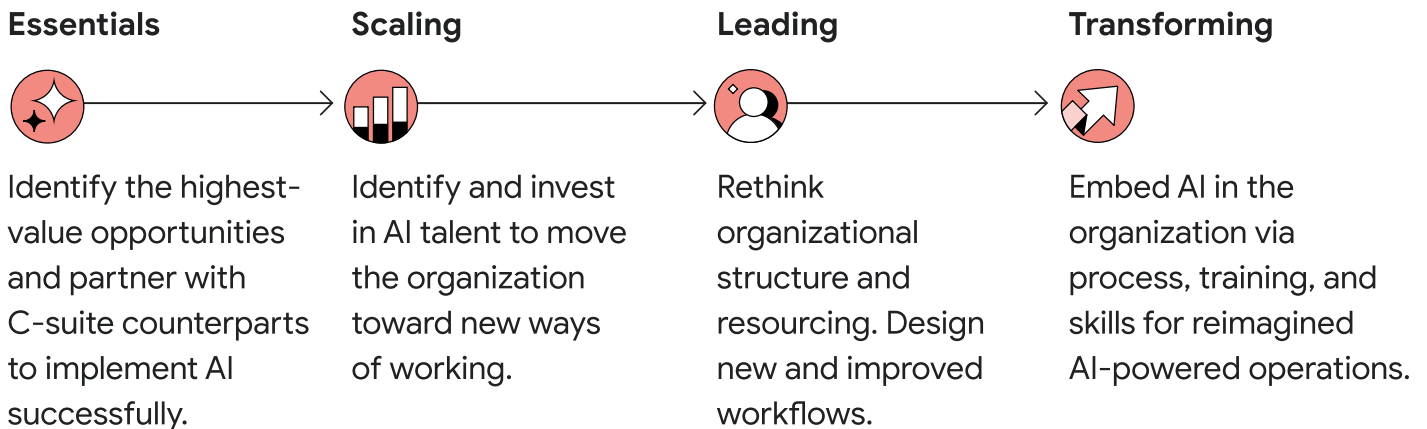


Meridian, Google's next-gen MMM, delivers clearer performance insights across online, offline, and TV. Plus, it uniquely measures the full impact of Search and Video with advanced attribution and reach and frequency modeling.

Complementing MMMs, data-driven attribution models can help assign credit to each critical step that led to a conversion and help with optimization. Incrementality experiments help you go deeper and understand the real drivers of your campaign performance. They can show you what to do differently by making MMMs more accurate. We are now making incrementality testing easier and faster across all Google Ads campaigns.

04 People and process

CMOs are uniquely positioned to drive growth in the AI era, with access to some of the highest impact use cases of AI. However, scaling remains a challenge and change management is often cited as a key barrier. Here's how you can chart your journey to AI excellence.



Two key factors to consider here are talent and cross-functional partnership. Investments in people — such as hiring talent with AI skills, encouraging experimentation through internal competitions, incorporating AI use in reviews, and assessing AI skills in talent planning — can help teams evolve to be truly AI-first.

Scaling the full value of AI in marketing requires system-wide integration across functions. It's critical to create and develop advocacy across your organization, especially with your finance, engineering, legal, HR, and product teams. We think of this as the “magic circle” we need around the CMO to deliver on the promise of AI for marketing. Only 10% of leaders effectively build cross-functional AI advocates.²¹

💡 Industry inspiration

H&R Block

To bridge the AI adoption gap, H&R Block Chief Marketing and Experience Officer Jill Cress implemented a strategy focused on empathy and education, including a four-week AI training sprint with expert sessions and incentives designed to meet team members where they were at in their learning journey. The result? A 24% spike in AI marketing tool usage across the organization.

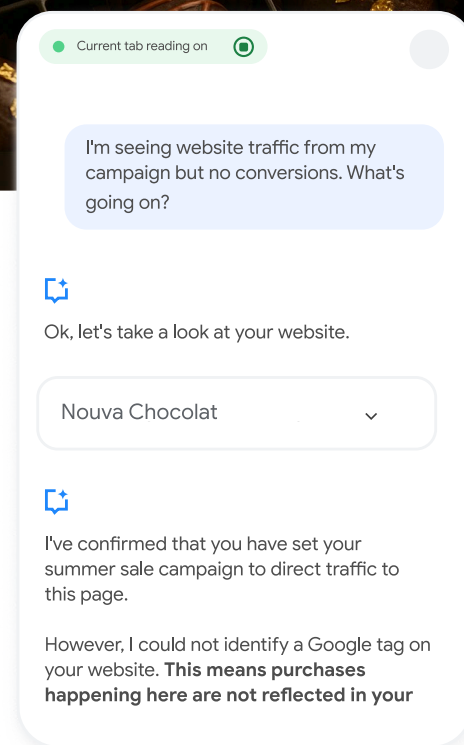
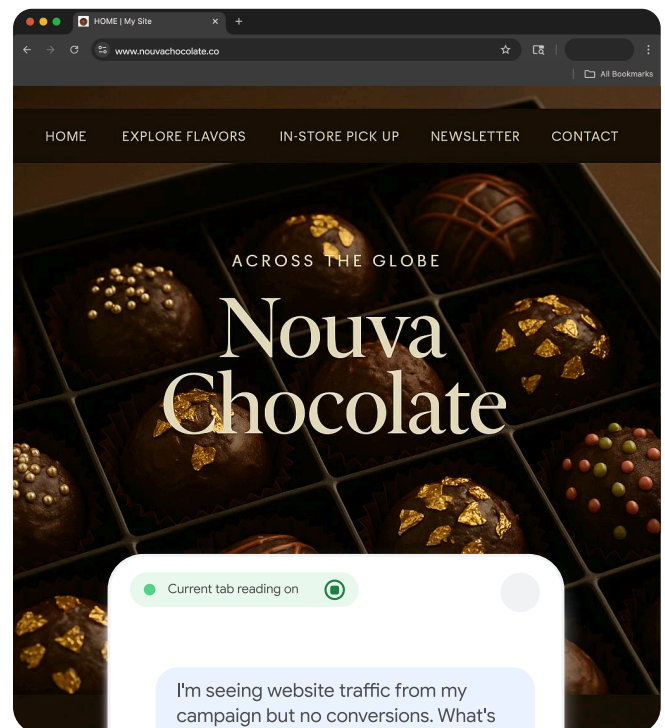
Agents for AI acceleration

Powerful agentic capabilities are coming to Google Ads and Google Analytics to help accelerate your journey across each of these dimensions. These new capabilities will help with everything from onboarding and campaign creation to reporting and troubleshooting, enabling more confident campaign optimization.

Marketing Advisor, an agent coming to Chrome, will be capable of managing complex tasks for you across different platforms and offers a multimodal experience across text, voice, and video. It can understand what is on your screen, offer recommendations, and execute on tasks with your permission. For instance, it can help implement measurement for Google campaigns on your website, streamline complex multisite tasks such as tagging, identifying when a tag is missing, and installing it for you with your permission.

It's also designed to proactively help advertisers run assessments and identify strategies across their entire business, offering insights such as seasonal trends for product categories.

The AI agent can be particularly helpful when working across Google properties — such as Google Ads, Help Center, Google Analytics, and within websites and content management systems — giving it the ability to help diagnose problems with campaigns or uncover new growth opportunities.



➔ What's next

As marketers build scale with AI to meet consumers across the 4S behaviors, tapping into culture and communities can help brands build and deepen authentic connection with consumers.



Chapter 4

Creators as strategic partners

Executive Summary

Creators are pivotal strategic partners for marketers, enabling authentic connections through culture and communities. Here's what you need to know.

- Culture and community are critical to establishing authentic connection with consumers, which is harder today than ever before. Creators are at the center of culture and community, with active fandoms that don't just follow culture but actively shape it.
- YouTube and its creators are pioneering the new TV, which doesn't look like the old TV. Creators move across formats with ease — from long-form entertainment to live events, and short-form video to podcasts.
- Creators are core to shopping, acting as storytellers and trusted sales drivers; 81% of U.S. viewers agree that content from YouTube creators helps them research and discover products, a figure that surpasses other social media platforms.²²
- Brands that leverage creators as strategic partners tap into their strength across culture, communities, and video.

As people search, stream, scroll, and shop simultaneously, brands can forge deeper, more authentic connections with consumers by tapping into the cultural zeitgeist and the power of communities. Creators can be a key differentiator in this pursuit and are undisputed experts in video, which is a crucial medium across the 4S behaviors.

The good news is, creators have already built the capabilities and scale that brands seek in partners. As the startups of Hollywood, creators are reimagining the industry that inspired them — some are even building state-of-the-art studios. Take Inoxtag, a French creator who set out to film his climb of Mount Everest. He built a team of screenwriters, graphic artists, and a director to create “Kaizen,” a feature-length documentary that premiered both in cinemas and on YouTube, where it drew 17 million views in under 48 hours.

People now watch over 1 billion hours of YouTube daily on their TV screens.²³



Creators today shape culture and build powerful communities of ride-or-die fans. Brands that engage them as strategic partners can tap into both.

YouTube and its creators are pioneering the new TV — and it doesn't look like the old TV

When viewers are streaming and scrolling, they want to watch what matters to them, unconstrained by format, genre, and style. They might want to experience the Eurovision Grand Final, then watch past performances of their favorite artists. Or they might want to watch highlights of the U.S. versus France Olympic basketball match, followed by a two-hour podcast with a breakdown from NBA legends. People now watch over 1 billion hours of YouTube daily on their TV screens.²³

This shift is being driven in part by creators who move across formats with ease on YouTube — from long-form entertainment to live events, and short-form video to podcasts. Podcasts are one example of this format innovation: More than 1 billion people watch podcasts on YouTube each month,²⁴ spanning everything from commentary to long-form interviews.

81% of U.S. viewers agree that content from YouTube creators helps them research and discover products, a figure that surpasses other social media platforms.²⁵

Creator communities run deep

By cultivating long-standing relationships with their audiences, creators make viewers feel genuinely seen and heard, building a level of loyalty and trust rarely found in the more distant relationships between traditional entertainers and fans. This intimate connection — combined with their vast reach — allows creators to rival or even surpass the audience impact of more traditional productions.

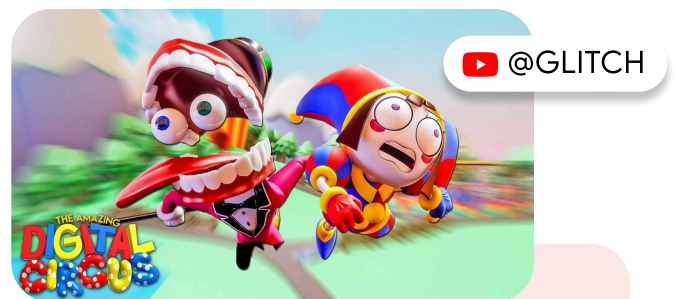
Creator fandoms don't just follow culture, they shape it.



But not all platforms are created equal: 81% of U.S. viewers agree that content from YouTube creators helps them research and discover products, a figure that surpasses other social media platforms.²⁵ This influence of creators throughout the consumer journey contributes to significant brand outcomes: YouTube drives higher long-term ROAS than TV, online video, and paid social.²⁶

These creator fandoms don't just follow culture, they shape it. And rather than just watching a video, fans put their own unique spin on it.

A prime example is Glitch's animated dark comedy series, "The Amazing Digital Circus." Its pilot alone garnered over 300 million views, but the fan response was even more viral. Their collective songs, memes, and spinoff content generated an astounding 25 billion views, underscoring the profound influence of creator-led communities.



The Amazing Digital Circus debuted with over 300 million views.

Creators are core to shopping

Getting customers to notice your brand is a lot harder than it used to be. Consumers are already inundated with options as they scroll through endless feeds. For brands, the ultimate challenge isn't just being seen. It's being chosen. Moving shoppers from discovery to decision requires trust, depth, and genuine connection — especially when the potential purchase is planned.

This is where YouTube is unique, both in terms of engagement and creator trust. In the past 12 months, YouTube ads viewed on connected TV screens drove over 1 billion conversions,²⁷ and 82% of viewers believe that YouTube has the most trusted creators.²⁸

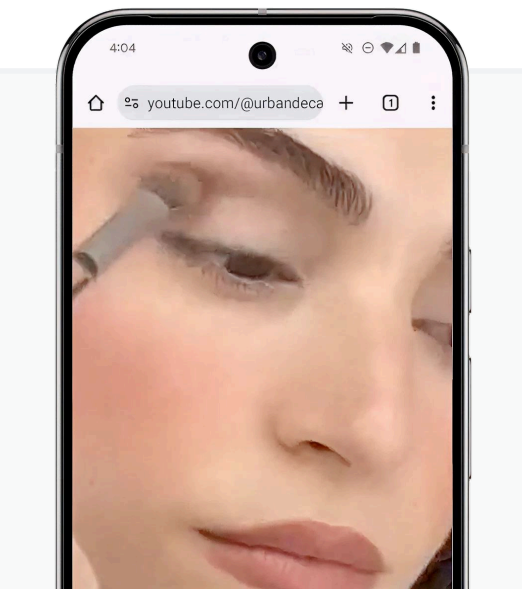
Creators help shoppers to cut through overwhelming choices, reduce research time, and boost their confidence to move forward with a decision more quickly. This positions creators as both storytellers and sales drivers, able to inspire action in formats that feel native and relevant.


Whether it's Shorts (over 100 billion daily views, on average²⁹), livestreams, cinematic long form, or podcasts, the fluency that creators bring across formats makes them essential partners for brands looking to scale relevance and performance.

Industry inspiration

Urban Decay

For the relaunch of its iconic eye shadow palette, Urban Decay wanted to build connection and conversation with a diverse community of shoppers. It teamed up with beauty creators to reach their subscribers with authentic, relatable product application videos. The result was creator-led YouTube Shorts, made in a casual style with each creator's personal touch, that yielded a 278% surge in search lift.



 **278%**
surge in search lift

Samsung

To wow Gen Z with the Galaxy S24, Samsung partnered with **MrBeast** to launch its new smartphone. The brand challenged MrBeast to put the phone's features to the test — which he did while suspended 100 feet in the air — amplifying its brand presence with a 100% share-of-voice takeover on his channel. That enthusiasm helped generate 25 million impressions in under 72 hours, and fuel a 6% lift in brand searches — a key driver of Samsung's business.

Uber

Uber sought to boost awareness and sign-ups among parents for its new Teen Accounts product, so it teamed up with creator, **Pantons Squad**, who used their authentic voice to showcase the new feature. Uber then amplified this content using AI-powered formats like Video reach campaigns and Demand Gen to maximize reach and drive conversions. The approach delivered Uber's best-ever brand lift results, fueling a significant 24% increase in parent awareness. Demand Gen campaigns drove a 110% lift in "uber teens" searches and contributed to a 6% lift in overall conversions.

Volvo

To reach new, relevant lifestyle audiences, Volvo forged a unique partnership with creator, pianist, and composer **Chloe Flower**. Volvo worked with her to remix the unique sounds of its electric vehicles into original compositions, delivering an immersive, novel YouTube ad experience targeted to music fans. The ad achieved view-through rates of 44% — 24% above the auto industry benchmark — while positioning Volvo in a clearly differentiated way.

→ What's next

Consumer behavior is shifting, AI is accelerating, and creators are reshaping culture. The opportunity is clear. The question is: Where do you start?



Chapter 5

Your action plan: Future-ready, now

Executive Summary

This is a crucial moment for marketers to become future-ready by strategically building AI strength. The updated Google Ads AI Essentials 2.0 framework provides a clear guide across three core areas.

- **AI Data Strength:** Connect first-party data to unlock new signals for performance and measure incrementality with experiments across campaign types.
- **AI Content Strength:** Create user-focused content for paid media, generate high-quality creative assets, and access format controls in Video view campaigns.
- **AI Performance Strength:** Harness AI performance strength through the Power Pack, our next generation of AI-powered campaign solutions, built for this new era of Search and multimodal experiences.

Holiday and annual planning are around the corner. Now is the time to align your team, sharpen your strategy, and get ready to scale. What you do in the coming weeks will shape how you show up in the coming months. Here are tools to help you get started today.



Meet the Google Ads AI Essentials 2.0

Last year, we introduced our first AI Essentials framework to help marketers navigate the evolving AI landscape. Given the rapid innovation in AI — both in consumer adoption and AI tools available to marketers — we’ve updated our framework. We’re excited to present the AI Essentials 2.0, your updated guide to putting next-gen Google AI to work, with new areas that reflect these advancements.

AI Data Strength

New

Data: Connect your first-party data and upgrade your tag in Data Manager. Use data sources, like your website and CRM, to unlock new signals.

New

Measurement: Measure incrementality with experiments across many campaign types, with lower budget requirements and improved methodology. Optimize the full value of your budget with [Meridian](#) and [Budgeting Tool](#) in Google Analytics.

AI Content Strength

New

Content & SEO: Create original, user-focused content for paid media and leverage [Creator Partnerships](#). To succeed with [SEO in the AI era](#), craft helpful content, measure true value, and build quality with AI.

Creative: Generate high-quality creative assets through [Asset Studio](#) and explore image-to-video capabilities with Veo and Imagen.

YouTube Video reach & Video view campaigns: Access format controls now available in Video view campaigns. And new this year: Help maximize reach of your non-skippable ads with Video reach campaigns non-skips.

AI Performance Strength: The Power Pack

Power Pack is our next generation of AI-powered campaign solutions, built for this new era of Search and multimodal experiences. Power Pack is the engine that will drive next-level performance across Search and YouTube, using Performance Max, AI Max for Search campaigns, and Demand Gen.



Performance Max: Set up asset best practices, like maximizing your asset variety, and opt into final URL expansion. Last year, we launched more than 90 quality improvements in [Performance Max campaigns](#) that increased conversions and conversion value by more than 10% for advertisers.³⁰ Now Performance Max offers even more visibility and control: Access [search terms reporting](#), [channel performance reporting](#), and diagnostics.

New

Search Ads: Activate [AI Max](#) for Search campaigns to drive performance on new, relevant queries and expand reach to AI surfaces with personalized creatives and landing pages in just one click. Google AI supercharges your ads performance with a [suite of targeting and creative enhancements](#) — all with the controls and transparency you need.

Demand Gen: Set up look-alike audiences and adopt video enhancements. Now you can use channel controls to customize your media mix. Create and [capture demand](#) across Google's most visual surfaces, including YouTube, Shorts, Discover, Gmail, and Google Display Network.

New

Agentic capabilities to support, optimize, and advise: Get personalized help from our [AI agents](#) in Google Ads and Analytics, and for all your needs across the web.

Sources

- 1, 2. Google/Ipsos, AR, AU, BR, CA, CL, CO, FR, DE, ID, IN, IT, JP, KR, MX, NL, PE, PH, PO, SG, ES, SE, TW, TH, U.K., and U.S., Global CoAR, AU, BR, CA, CL, CO, FR, DE, ID, IN, IT, JP, KR, MX, NL, PE, PH, PO, SG, ES, SE, TW, TH, U.K., and U.S., Global Consumer Journeys online survey, online shoppers 18+ n=19,573, online purchasers n=11,835, online purchasers who used 5+ touchpoints, "ANY" represents being larger than over 80 global and local platforms that consumers identified using, Dec. 2024.
3. Google/Measure Protocol, U.S., Consumer Journey Analysis, online consumers 18+, n=370 Android users, Oct. 24, 2024–Nov. 6, 2024.
- 4, 5. Google/Ipsos, AR, AU, BR, CA, CL, CO, FR, DE, ID, IN, IT, JP, KR, MX, NL, PE, PH, PO, SG, ES, SE, TW, TH, U.K., and U.S., Global Consumer Journeys online survey, online shoppers 18+ n=19,573, online purchasers n=11,835, online purchasers who used 5+ touchpoints, "ANY" represents being larger than over 80 global and local platforms that consumers identified using, Dec. 2024.
6. Google Internal Data, Jan. 2025.
7. ComScore CTVi, U.S., YouTube is the no. 1 in CTV household reach, Oct. 2024.
8. Google Internal Data, Sept. 2024–April 30, 2025.
9. Google Internal Data, March 2025–May 2025.
10. Google Internal Data, 2025.
- 11, 12. Google Internal Data, April 2025.
- 13–19. Google/BCG, Path to AI Excellence, Global, N=2,135, marketing AI decision-makers/influencers at small to large companies, Sept. 2024.
20. Google/BCG, Global Measurement Survey, Global (BR, DE, IN, JP, U.K., U.S.) n=3,140 senior marketing analytics professionals with an annual ad spend of \$175K (BR), \$375K (DE), \$300K (IN), >\$400K (JP), >\$350K (U.K.), and >\$500K (U.S.), fielded Jan. 27, 2025–Feb. 15, 2025.
21. Google/BCG, Path to AI Excellence, Global, N=2,135, marketing AI decision-makers/influencers at small to large companies, Sept. 2024; Google/BCG, The Blueprint for AI-Powered Marketing, page 4, exhibit 1, Dec. 2024.
- 22, 25. Kantar, U.S., 81% of viewers in the United States agree that YouTube has creator content that helps them research and discover products when shopping, outperforming the social media average (69%), which includes Facebook, Instagram, TikTok, and Snapchat, 2025.
23. YouTube Internal Data, Global, Jan. 2024.
24. YouTube Data, Jan. 2025.
26. Nielsen custom MMM meta-analysis commissioned by Google, on average, YouTube drives higher long-term ROAS than TV, other online video, and paid social. YouTube vs TV (1.89x), YouTube vs other online video (2.1x), YouTube vs paid social (2.3x); Equity-to-Sales MMM Meta Analysis commissioned by Google, covering a 2-year measurement period of 20 CPG brands from across the 2021 to 2023 timeframe. "Long-term ROAS" is defined as impact of each marketing channel in driving brand equity and this brand equity's impact in driving sales, relative to the marketing channel's media spend.
27. Google Data, Global, April 17, 2024–April 15, 2025.
28. Google/Kantar, U.S., Future of Video, n=1,001 YouTube viewers, n=2,160 weekly video viewers 18–64, competitive set includes nine market competitors: linear TV, Netflix, Disney+, Amazon Prime Video, Max, Facebook, Instagram, TikTok, and Snapchat, Jan. 28, 2025–Feb. 10, 2025.
29. YouTube Internal Data, Global, May 2025.
30. Google Internal Data, 2024.