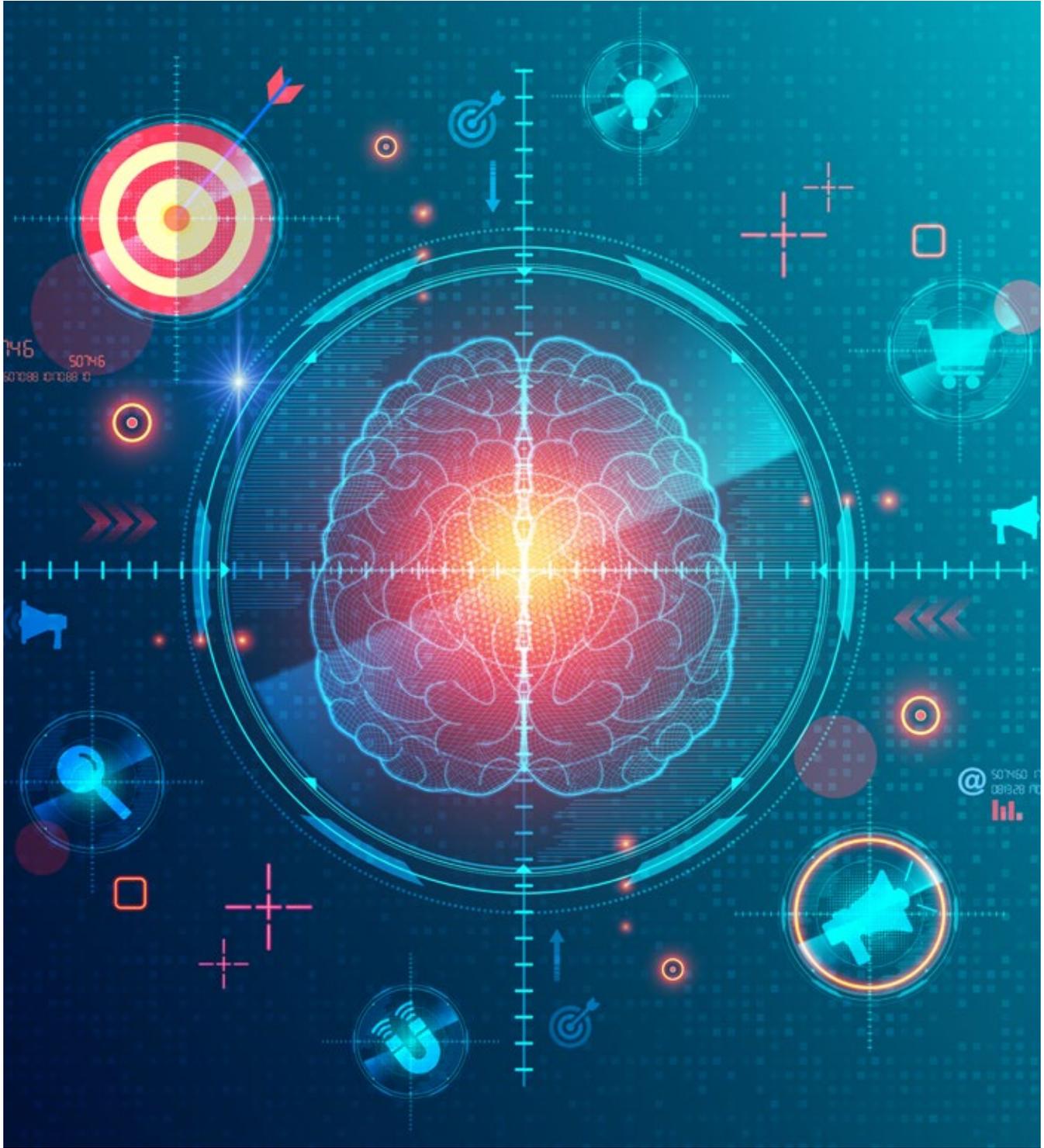


JANUARY 2026

# CREATIVE INTELLIGENCE

## ADOPTING & OPERATIONALIZING CREATIVE INTELLIGENCE



## ACKNOWLEDGMENTS

This report would not have been possible without the significant contributions of the hundreds of marketing industry leaders who contributed their time and insights in support of this research. To all of them, we say thank you.

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## ABOUT THE PAPER

This white paper builds on the foundational Winterberry Group "Creative Intelligence" paper published in June 2025, and examines the practical architecture, integration requirements, use cases, and adoption framework necessary for enterprise implementation.

This research draws on a survey of over 120 creative and media agencies across the US and UK, complemented by in-depth interviews with marketers, agencies, and technology providers. The result is an evidence-based view of how creative intelligence is being activated today and what is required to scale adoption.

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# TABLE OF CONTENTS

## 06 Executive Summary

### 10 Section I.

#### Creative Intelligence: The Foundation for Creative Intelligence – The Core Components for Creative Data and Analytics Solutions

The Increasing Availability and Enablement of Creative Data for CI

Performance Analytics – Merging Creative Effectiveness Data with Media and Audience Data

Adjacent Technologies to the Creative Intelligence Solution Stack

### 13 Section II.

#### Integration of Audience Data with Creative Data: Architecture and Implementation

The Data Integration Challenge

Solution Architecture Overview

Data Flow and Processing Pipeline

Implementation Considerations

### 14 Section III.

#### Use Cases and Outcomes: AI-Enabled Personalization, Agentic Tools, Creative Optimization, and Measurement

Pre-testing: Strategic Planning and Asset Development

In-Flight: Real-Time Activation and Optimization

Post-Activation: Measurement and Learning

Agentic AI Applications

Measurable Outcomes Across the Funnel

### 16 Section IV.

#### Key Components for Creative Intelligence Adoption: People, Process, and Technology Investments

People: Roles, Skills, and Organizational Structure

Process: Workflows and Operating Rhythms

Technology: Platform Requirements and Integration Architecture

Internal Versus External Resources

Investment Sequencing and Pilot Approaches

Change Management and Adoption Barriers

Measuring Adoption Success

### 19 Section V.

#### Pricing Models for Creative Intelligence

### 20 Section VI.

#### The Rapid Evolution and Adoption of Creative Intelligence – Conclusions and Key Takeaways

Sizing the Market

### 25 Methodology

### 26 About the Sponsors & WG

# TABLES AND CHARTS

- 07 Diagram 1.**  
*Creative Intelligence Solutions Encompass Core Capabilities Including Creative Data, Analytics, Activation and Measurement*
- 07 Figure 1.**  
*Creative Optimization is the Top Priority for Clients Today*
- 8 Figure 2.**  
*CPG/FMCG and Retail Lead Adoption of Creative Intelligence*
- 9 Figure 3.**  
*US Creative Intelligence-Powered Creative Spend is Expected to Grow at a ~23% CAGR Through 2028*
- 10 Figure 4.**  
*DCO, Creative Intelligence and Creative Data Resonate as Top Technologies Utilized by Organizations*
- 11 Figure 5.**  
*Performance, Sentiment, Attention and Social Engagement Metrics Key Data Sources for Creative Intelligence*
- 19 Figure 6.**  
*Technology/Platform Licensing and Asset Volume Based Pricing are the Top Pricing Models Utilized by Organizations Today*
- 20 Figure 7.**  
*Creative Optimization, Personalization and Pretesting Will Become Top Use Cases in 2027*
- 21 Figure 8.**  
*CPG/FMCG and Retail Remain Top Verticals to Adopt Creative Intelligence Solutions in the Future*
- 22 Figure 9.**  
*Creative Intelligence Platforms and DCO will Remain Top Technologies Adopted in the Future*
- 22 Figure 10.**  
*Creative Performance Data, Attention, Sentiment and Social Engagement Remain the Top Type of Creative Data in the Future*
- 23 Figure 11.**  
*US Creative Intelligence-Powered Creative Spend is Expected to Grow at a ~23% CAGR Through 2028*
- 24 Figure 12.**  
*Creative Intelligence-Influenced Creative Spend Is Growing Faster Than Overall Creative Spend*

## EXECUTIVE SUMMARY

As global markets continue to undergo an AI-led transformation, the trillion-dollar advertising ecosystem is experiencing accelerated and increasingly structural change. Against a persistent mandate to “do more with existing budgets—whether more, the same, or less,” marketers are confronting new pressures to optimize spend, compress cycle times, and deliver against clearly defined business outcomes. These forces are collectively pushing the boundaries of how advertising effectiveness is defined, measured, and improved.

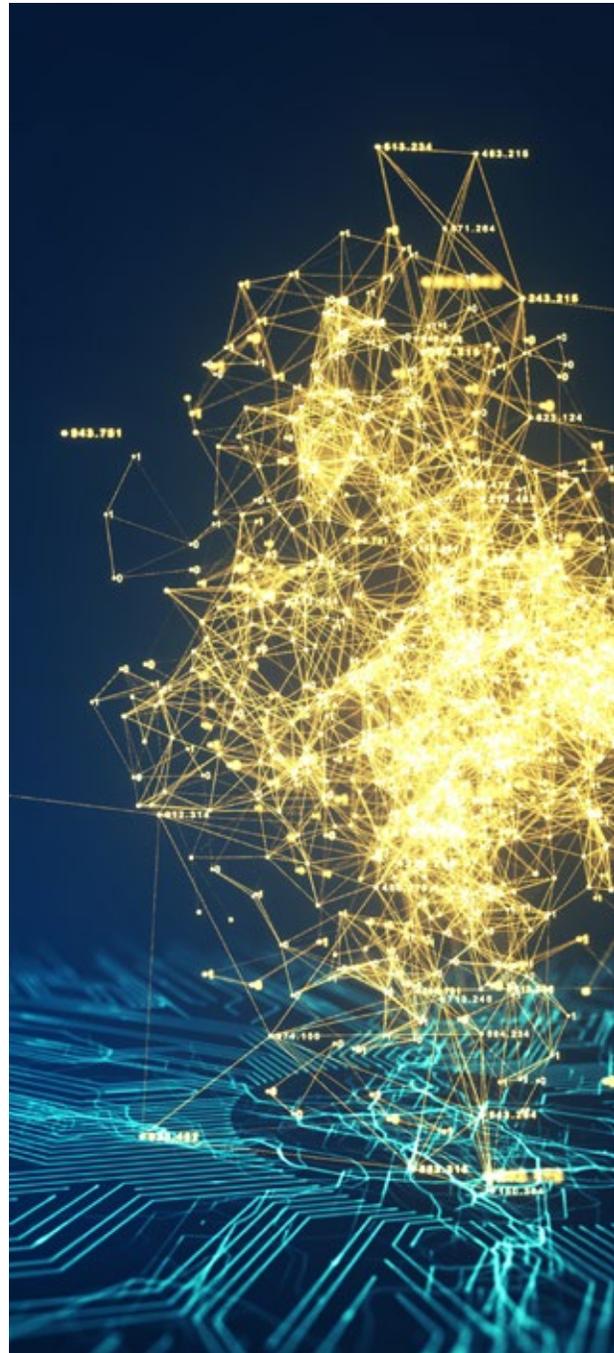
Over the past 15 years, the industry has pulled the “marketing data” lever aggressively—driven by digital data proliferation, programmatic buying, and omnichannel media adoption. That phase of evolution is now reaching maturity. Increasingly, attention is shifting to the creative dimension of advertising as the next critical lever of performance. Over the last 24 months in particular, the market has seen rapid adoption of solutions grounded in creative data and analytics. These solutions enable marketers to derive actionable insight from how individuals and households interact with creative and content—at the asset level, at the campaign level, and holistically across channels—unlocking new gains in creative effectiveness and operational efficiency.

In our initial paper, we defined **Creative Intelligence (CI)** as the ability to understand why consumers engage. Specifically, CI encompasses the collection and analysis of creative effectiveness data, contextualized by audience and media, and the application of those insights to measure and continuously optimize assets for effectiveness and engagement. Creative intelligence complements established forms of intelligence within the marketing ecosystem:

- **Media intelligence**, which focuses on where, when, and how interactions occur; and
- **Audience intelligence**, which centers on who the message is for, incorporating behavioral, preference, and motivational data to inform targeting, activation, and optimization.

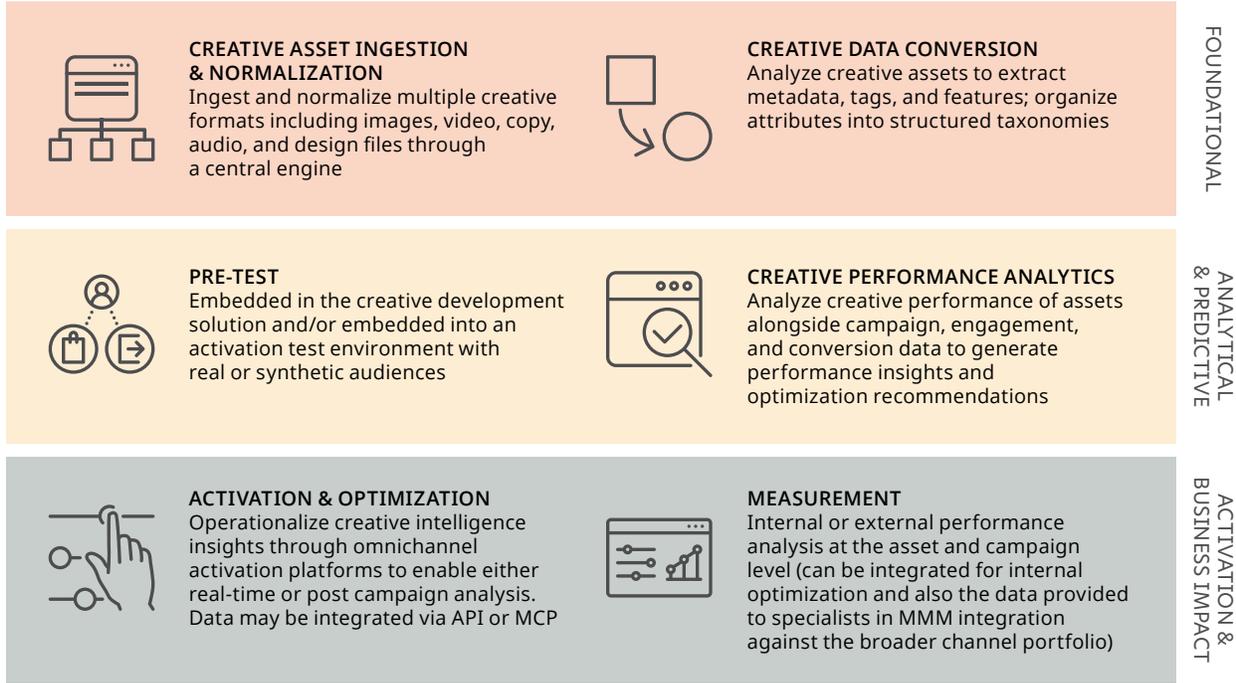
Together, these three dimensions form a more complete operating framework. Importantly, creative intelligence enables marketers to mix and match awareness, consideration, and performance objectives while measuring impact with fewer human capital resources. In doing so, it begins to erode the artificial distinction between “working” and “non-working” media—shifting the emphasis toward measurable contribution across all spend. Creative Intelligence transforms creative from a fixed cost into a measurable performance driver, enabling marketers to predict which assets will perform before launch, optimize creative in real-time during campaigns, and isolate creative’s true contribution to outcomes—materially improving ROI while reducing wasted production spend and compressing cycle times.

This study examines the evolving Creative Intelligence landscape, including the core capabilities that define creative intelligence solutions, where adoption is occurring across industries and organization types, the primary use cases driving demand, and the outlook for future growth. The analysis draws on a combination of a quantitative industry survey, expert interviews, secondary research, and Winterberry Group market modelling to assess how creative intelligence is being applied across the creative lifecycle, from concept development and testing through activation, optimization, and measurement.



**DIAGRAM 1 – CREATIVE INTELLIGENCE SOLUTIONS ENCOMPASS CORE CAPABILITIES INCLUDING CREATIVE DATA, ANALYTICS, ACTIVATION AND MEASUREMENT**

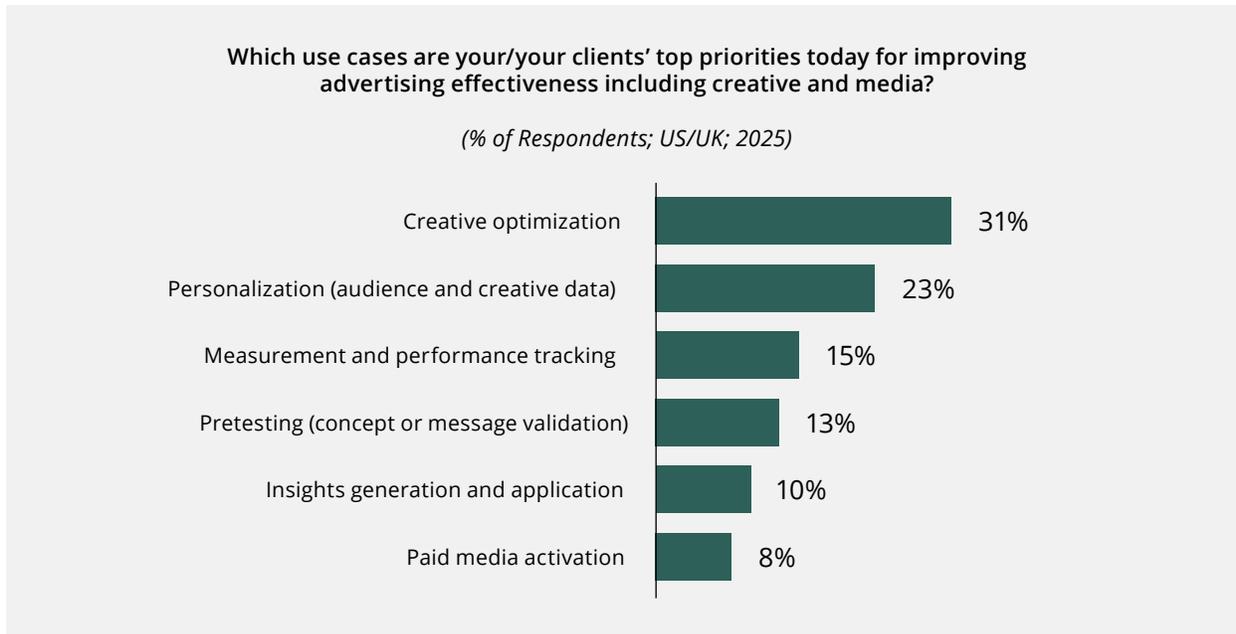
**CREATIVE INTELLIGENCE SOLUTIONS**



Survey findings indicate that demand for creative intelligence is being driven by multiple, complementary use cases. Dynamic creative optimization represents the leading driver at 31%, followed by personalization at 23%, with measurement and

performance tracking accounting for an additional 15%. Collectively, these results underscore the market’s emphasis on actionable optimization rather than retrospective reporting alone.

**FIGURE 1 – CREATIVE OPTIMIZATION IS THE TOP PRIORITY FOR CLIENTS TODAY**



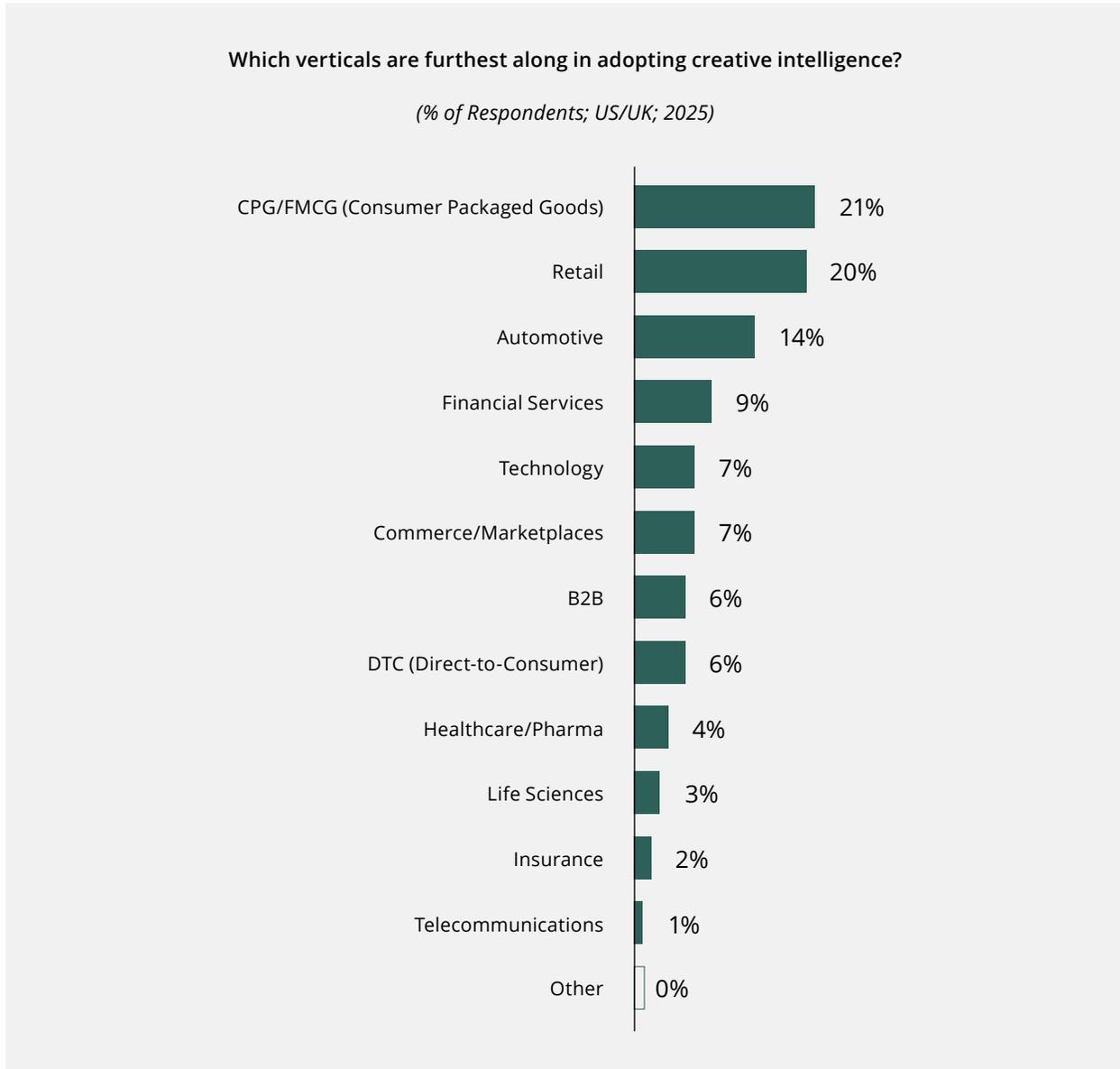
Source: Winterberry Group Survey N=125 (2025)

Notably, the survey revealed minimal variation between U.S. and U.K. respondents, suggesting that creative intelligence use cases are broadly universal rather than regionally distinct.

A deeper examination of adoption by vertical highlights meaningful differences by industry segment. Consistent with

insights gathered during the first half of 2025, early adoption has been led by CPG/FMCG and Retail—sectors characterized by large product catalogs, high asset volumes, and substantial digital media investment. In the U.K., retail emerged as the leading vertical for adoption.

**FIGURE 2 – CPG/FMCG AND RETAIL LEAD ADOPTION OF CREATIVE INTELLIGENCE**

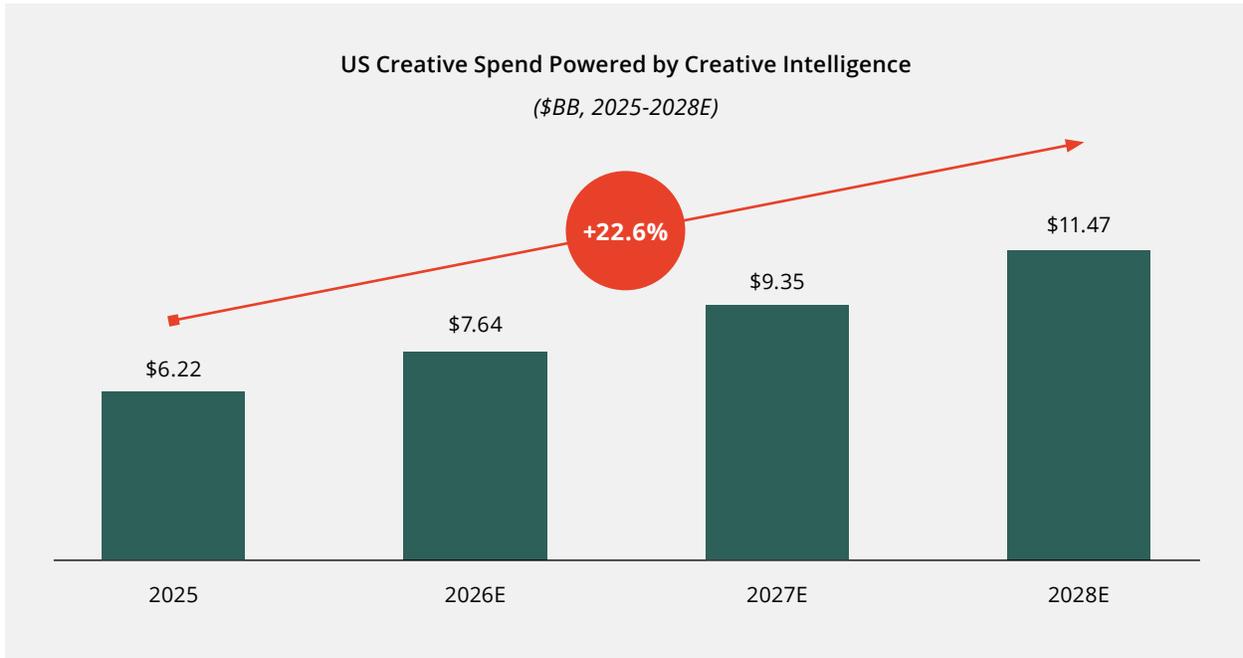


Source: Winterberry Group Survey N=125 (2025)

As with other AI-driven capabilities, regulated industries are lagging relative to these early adopters. Interviews suggest that adoption in these sectors is proceeding cautiously, with an emphasis on controlled testing and compliance assurance.

The net effect of these adoption dynamics is material market expansion. In the U.S., creative intelligence-powered creative spend is expected to grow at a compound annual growth rate of approximately 23%, reaching an estimated \$11.47 billion by the end of 2028.

**FIGURE 3 – US CREATIVE INTELLIGENCE-POWERED CREATIVE SPEND IS EXPECTED TO GROW AT A ~23% CAGR THROUGH 2028**



WG Market Model 12.25

Within the martech ecosystem, earned and owned channels—where dynamic creative optimization faced fewer barriers—have led early adoption. The next phase of growth is expected to be driven by deeper integration with digital paid media, enabling consistent messaging and optimization across the full spectrum of addressable channels. In this environment, creative intelligence increasingly functions as a unifying layer across media types.

During this initial period of rapid adoption, marketers should expect the most immediate impact in paid social environments,

where solutions such as platform-native optimization tools are gaining share. Adoption is also accelerating across programmatic display, digital audio, video, and connected TV. Over time, linear television is expected to follow, as converged TV continues its progression toward greater unification and addressability.

Taken together, these trends position creative intelligence not as a tactical enhancement, but as a foundational capability for modern marketing organizations navigating an increasingly automated, outcome-driven advertising landscape.



## SECTION I

### THE FOUNDATION FOR CREATIVE INTELLIGENCE - THE CORE COMPONENTS FOR CREATIVE DATA AND ANALYTICS SOLUTIONS

In the current market, digital—and particularly programmatic—advertising remains largely anchored in the use of Dynamic Creative Optimization (DCO). These approaches rely on the rotation of pre-built creative variations to align creative assets with audience segments and placement context. While DCO continues to represent a meaningful share of deployed capability, creative intelligence platforms are emerging rapidly alongside it. These platforms are designed to support end-to-end creative activation and optimization, leveraging creative data to inform pre-testing, in-flight optimization, and post-campaign measurement within a unified operating framework.

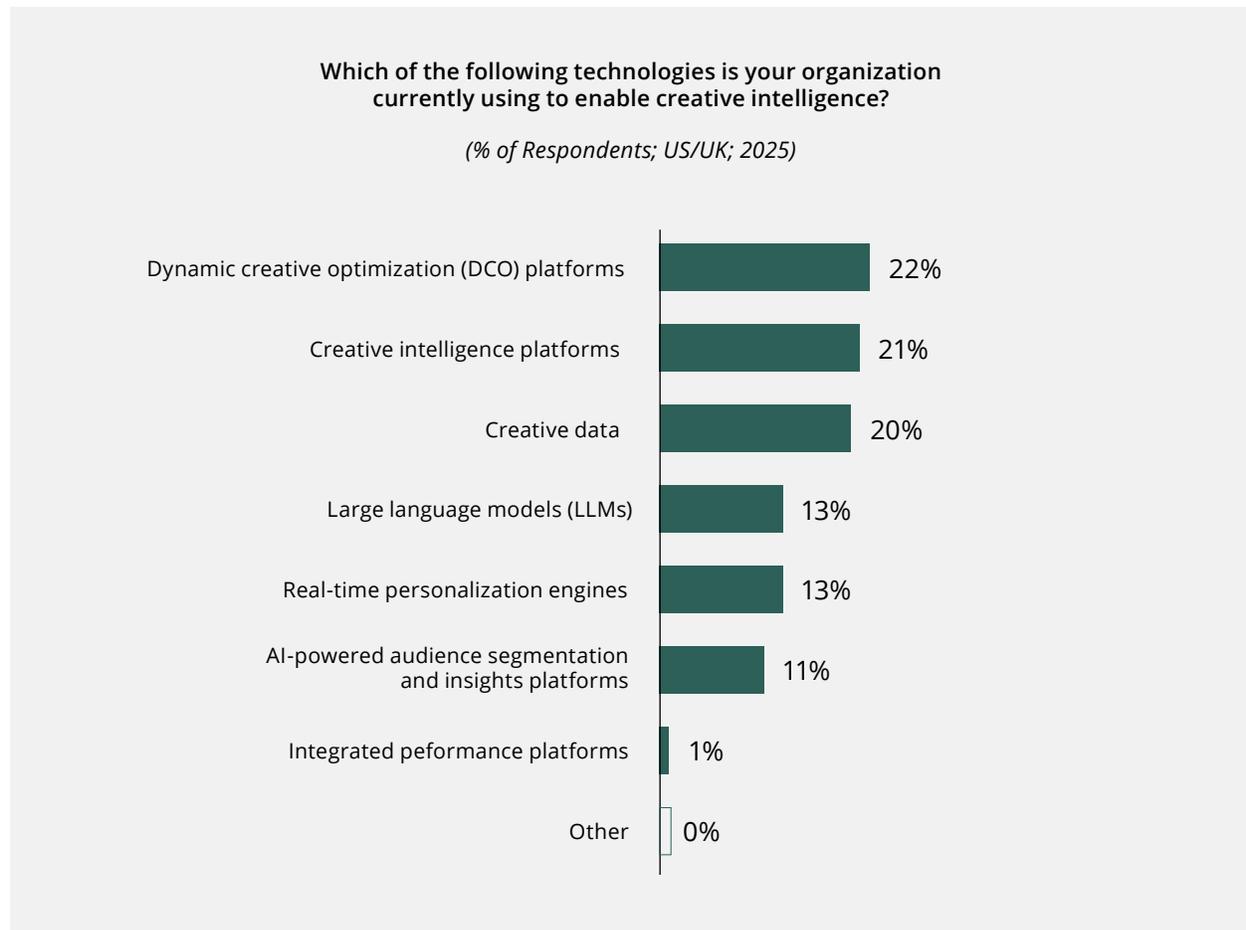
**Creative data** refers to the structured and unstructured information associated with advertising creative assets and their effectiveness. This includes asset-level attributes such as visual elements, copy, format specifications, and metadata; performance

indicators such as click-through rates, conversions, engagement, and brand lift; and contextual signals including channel, audience segment, competitive environment, and timing. Creative data differs materially from traditional campaign data in that it focuses on what is contained within the advertisement—the creative elements themselves—rather than solely on media delivery metrics such as where, when, or to whom the ad was served.

**Analytics solutions** are the software platforms and services that transform raw data into actionable insight through aggregation, processing, analysis, visualization, and predictive modeling. These solutions ingest information from disparate sources, apply statistical and machine-learning techniques to identify patterns and relationships, and surface findings through dashboards and reports that support data-driven decision-making.

Taken together, creative data provides the foundational inputs, analytics enable interpretation and insight generation, and creative intelligence enables those insights to be operationalized across activation, optimization, and measurement. The combination enables brands and agencies to optimize creative strategy at scale, improve effectiveness, and increase return on advertising investment.

**FIGURE 4 – DCO, CREATIVE INTELLIGENCE AND CREATIVE DATA RESONATE AS TOP TECHNOLOGIES UTILIZED BY ORGANIZATIONS**



Source: Winterberry Group Survey N=125 (2025)

While personalization—particularly in paid media—remains in an early phase of adoption, interest continues to grow. Similarly, large language models and advanced machine-learning applications are still primarily focused on audience segmentation and insight generation, rather than direct creative orchestration.

**THE INCREASING AVAILABILITY AND ENABLEMENT OF CREATIVE DATA FOR CREATIVE INTELLIGENCE**

Creative data serves as the core enabler of creative intelligence by transforming creative assets into structured, analyzable information. This process involves capturing thousands of creative decisions per asset, including visual composition, messaging hierarchy, emotional tone, pacing, brand element placement, and format specifications.

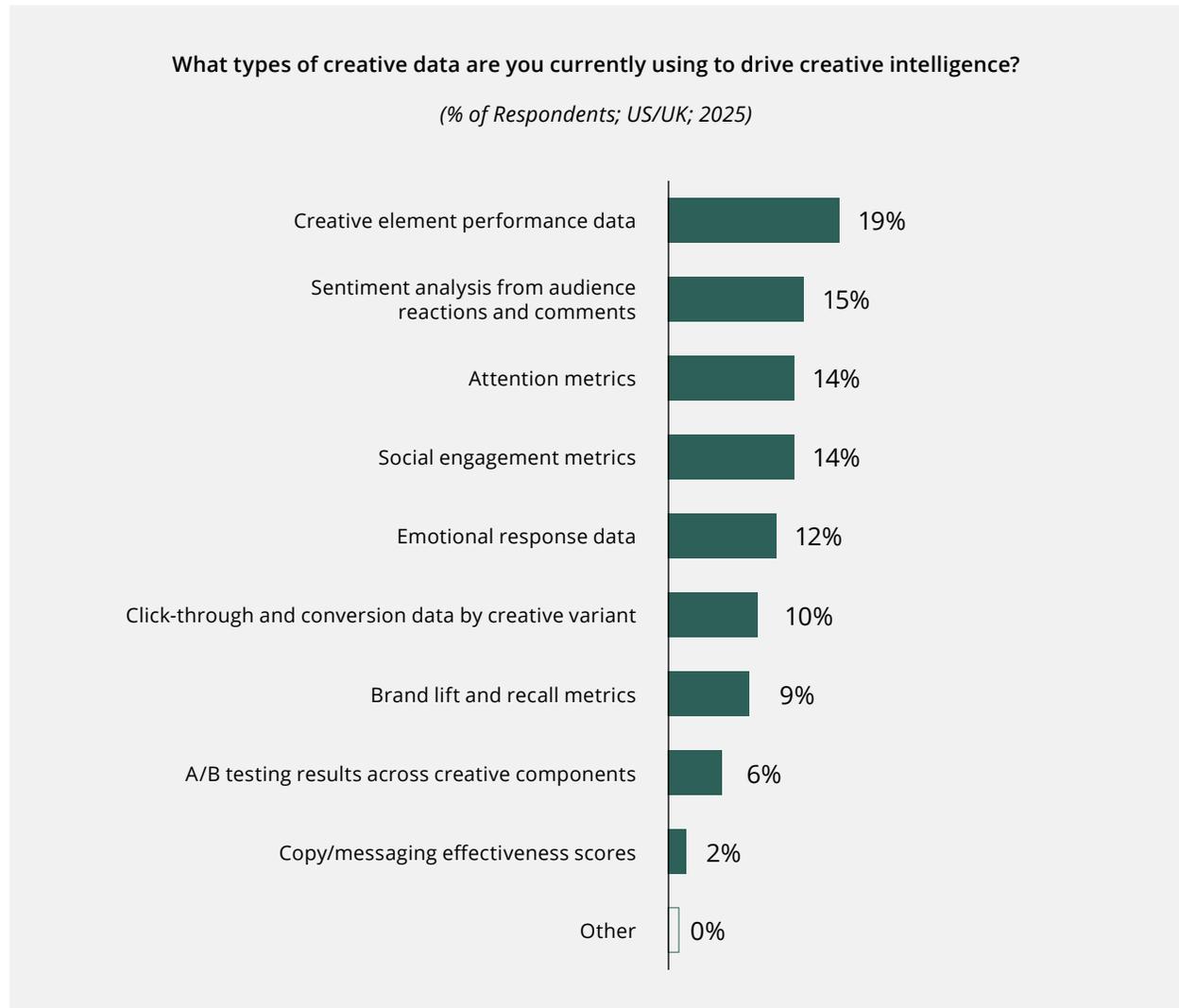
Core system functionality typically includes automatic ingestion from connected advertising platforms, with solutions pulling months of historical campaign data upon initial connection and continuously updating thereafter. More advanced

implementations leverage computer vision and natural language processing to deconstruct creative assets without manual tagging or human intervention.

Dozens of metrics may be captured within creative data collection efforts. These typically begin with asset-level and ad-level performance metrics, extend to sentiment analysis, and increasingly incorporate audience reaction and attention-based measures. Collectively, these categories account for more than half of total creative data aggregation.

Despite growing availability, data capture, management, and cleansing remain material operational challenges that directly affect the accuracy and usefulness of creative intelligence outputs. Key obstacles include inconsistent metadata standards across platforms—necessitating extensive normalization—loss of historical data when creative versions are overwritten or archived, and difficulty attributing effectiveness to specific creative variations when assets are rotated or modified mid-flight.

**FIGURE 5 – PERFORMANCE, SENTIMENT, ATTENTION AND SOCIAL ENGAGEMENT METRICS KEY DATA SOURCES FOR CREATIVE INTELLIGENCE**



Source: Winterberry Group Survey N=125 (2025)

Effective data capture depends on connectivity across both activation platforms and Digital Asset Management (DAM) systems, whether deployed independently or as part of integrated solutions. These connections enable asset retrieval as well as the reintegration of performance insights back into creative repositories. Creative intelligence platforms track assets at the component level, monitoring not only complete executions but also individual elements such as logos, color palettes, imagery, and copy treatments across multiple versions. This level of granularity represents a step change in the depth and quality of insight that can be generated.

### PERFORMANCE ANALYTICS: INTEGRATING CREATIVE, MEDIA, AND AUDIENCE DATA

Performance analytics link creative data with media delivery metrics and audience engagement signals. Where possible, this analysis operates across three distinct timescales: real-time optimization, campaign-level insight, and longitudinal measurement.

At the real-time level, analytics process impression-level signals including click-through rates, viewability, and creative exposure. Campaign-level analysis incorporates attention metrics and cross-channel performance comparisons. Longer-term measurement should consider how creative variables can be leveraged in the marketing mix modelling process and brand equity studies to identify how brands can fine tune creative decisions.

To be effective, analytics solutions must capture the platform-specific signals that influence ad delivery. Integration with ad servers, in addition to creative platforms, enables the ingestion of both creative assets and engagement metrics while preserving granular asset-to-performance linkage.

**"In an automated environment, you want to capture the signals the model used to optimize ad delivery. That means the metrics included on the ad platforms—CPMs, clicks, sales. They are not perfect, but they are the metrics that influence delivery, and when creative is part of that optimization, those signals become critical."**

*- VP of Strategy,  
Digital Marketing and Advertising Company*

### THE INTELLIGENT STUDIO

The intelligent studio represents the orchestration layer that governs creative deployment based on predictive performance modeling and real-time signals. Unlike legacy DCO approaches, which rely on static, rule-based logic, intelligent studios forecast asset effectiveness prior to launch and dynamically adjust delivery based on observed outcomes.

Core capabilities include pre-testing against platform best practices and brand guidelines, automated versioning aligned to audience and contextual signals, mid-flight budget reallocation toward higher-performing assets, and automated suppression of underperforming or non-compliant creative.

More advanced implementations support modular creative assembly, enabling systems to construct new versions by combining proven components rather than selecting among

fully rendered assets. This approach requires template-based architectures with parameterized elements that can be adjusted programmatically while preserving brand consistency.

### ADJACENT TECHNOLOGIES WITHIN THE CREATIVE INTELLIGENCE ECOSYSTEM

Several adjacent technologies support creative intelligence without constituting core components. Creative production platforms—including generative AI tools—sit upstream, accelerating asset creation but relying on creative intelligence to ensure alignment with effectiveness objectives.

Media activation platforms operate downstream, executing delivery based on creative intelligence recommendations while feeding performance data back into analytics engines. Platforms such as The Trade Desk, DV360, and walled-garden ad managers enable this feedback loop at scale. Integrated solutions such as PMax and Advantage+ are widely adopted, particularly among SMBs, but present limitations for mid- to large-scale advertisers seeking cross-channel consistency and centralized message control.

In owned and earned channels, Customer Data Platforms and identity resolution systems provide the audience intelligence layer that contextualizes creative performance and enables hyper-personalization. Effective creative optimization requires this audience infrastructure to operate in parallel with creative systems.

Marketing resource management and workflow platforms manage production and approval processes. While not analytical in nature, integration with these systems enables creative intelligence insights to flow back into production workflows, helping to close the optimization loop.

Creative intelligence does not replace creative production tools, nor does it substitute for media activation platforms. Instead, it establishes a new intelligence layer—connecting creative development and media execution through performance data—to support continuous optimization in an increasingly automated advertising environment.



## SECTION II

### INTEGRATION OF AUDIENCE DATA WITH CREATIVE DATA: ARCHITECTURE AND IMPLEMENTATION

#### THE DATA INTEGRATION CHALLENGE

Historically, creative data and audience data have resided in largely separate technology stacks, with limited interoperability. Audience intelligence has matured through investments in Customer Data Platforms (CDPs), identity graphs, and consent and governance frameworks. By contrast, creative assets have typically been distributed across Digital Asset Management (DAM) systems of varying sophistication, local or network storage environments, and directly within activation platforms themselves.

Creative Intelligence introduces the requirement to bring these data streams together—without displacing or rebuilding existing infrastructure. The challenge is not one of wholesale replacement, but of connectivity, orchestration, and the effective management of creative and performance data across disparate systems. Key integration hurdles include compatibility across disparate data structures, identity resolution across systems, and the ability to align creative exposure with observed audience behavior at scale.

#### SOLUTION ARCHITECTURE OVERVIEW

Creative Intelligence is most commonly deployed as an enabling intelligence layer—enhancing existing platforms rather than replacing them. On the audience side, it integrates with CDPs and data warehouses via APIs that provide segment definitions, behavioral signals, and identity-resolved engagement data. On the creative side, it connects to DAM systems for asset retrieval, advertising platforms for delivery and performance data, and measurement systems for outcome and attribution metrics.

At a functional level, the architecture typically relies on five core integration points:

- **First**, connectivity with DAM or other creative repositories enables creative asset ingestion for analysis, along with the reintegration of performance scores for governance and reuse. Campaign briefs and brand guidelines are often ingested in parallel to support compliance and consistency.
- **Second**, advertising platform APIs supply creative performance data alongside audience targeting parameters used during activation.
- **Third**, CDP or enterprise data warehouse connections provide audience segment definitions and behavioral attributes.
- **Fourth**, ad server integrations capture delivery metrics and support analysis linking creative exposure to audience interaction.
- **Fifth**, measurement platform integrations enable creative intelligence variables to enrich attribution models and Marketing Mix Models.

**“Having a strong content management system as the spine of how an advertiser builds creative—working with agencies and other partners—is incredibly important.”**

*- Vice President of Creative and Media,  
Marketing Data, Insights, and Analytics Company*

#### DATA FLOW AND PROCESSING PIPELINE

The data processing pipeline typically begins with the connection of advertising accounts to a creative intelligence platform, triggering, triggering automated ingestion of both active assets and historical campaign data. Each asset is deconstructed into component-level creative attributes, while associated audience targeting parameters and performance metrics are captured in parallel.

As campaigns execute, the system continuously ingests impression-level data, preserving linkage between specific creative versions, the audiences exposed to them, and subsequent engagement or conversion behavior. The resulting dataset is inherently multidimensional, connecting creative elements, audience attributes, and effectiveness outcomes.

More advanced implementations further enrich this dataset with additional signals, including contextual variables such as time of

day or device type, attention metrics from third-party partners, emotional response indicators where available, and downstream conversion or brand lift measurements.

#### IMPLEMENTATION CONSIDERATIONS

At scale, performance requirements are non-trivial. Creative Intelligence platforms may process billions of impressions per month while supporting near-real-time insight generation for in-flight optimization. This typically necessitates cloud-native architectures with distributed processing and elastic scalability.

Organizational alignment often represents the more significant barrier. Teams historically organized around either creative development or audience analytics must adapt to integrated modes of analysis and decision-making. Many organizations are introducing new roles—such as creative data analysts—capable of operating across both domains, alongside cross-functional workflows that bring creative strategists and audience planners together earlier in the campaign lifecycle.

**“We need a blend of technology and talent working together across disciplines. Speed is now more important than cost. Quality is subjective—but speed is not.”**

*- Chief Solutions Officer of  
Digital Marketing and Advertising Company*

Taken together, these factors underscore that successful Creative Intelligence adoption is as much an organizational transformation as it is a technical one.

## SECTION III

### USE CASES AND OUTCOMES: AI-ENABLED PERSONALIZATION, AGENTIC TOOLS, CREATIVE OPTIMIZATION, AND MEASUREMENT

#### PRE-TESTING: STRATEGIC PLANNING AND ASSET DEVELOPMENT

In practice, creative intelligence data is introduced well in advance of campaign launch. During strategic planning, historical creative performance informs campaign briefs, aligning intended outcomes with audience expectations based on proven engagement drivers. Risk-scoring models assess when experimental creative approaches are warranted and when established patterns are more likely to deliver predictable results.

At the concept development stage, AI-enabled pre-testing applies predictive scoring to evaluate creative assets against platform best practices, audience attributes, and brand-specific performance patterns prior to production investment. This capability materially reduces inefficient creative output. Interviews suggest that 40-50% of produced assets are never activated; identifying likely underperformers earlier in the process can eliminate a substantial amount of wasted production effort.

Predictive evaluation examines specific creative elements, including logo timing and prominence, copy length and complexity, visual pacing and scene structure, emotional tone, narrative flow, and brand integration. Each component is scored against known performance drivers, with aggregate scores indicating likely asset effectiveness.

**“Brands increasingly manage creative through scoring models rather than manual preflight reviews, codifying creative rules—such as logo placement or promotional messaging—into measurable criteria.”**

*- Vice President of  
Product and UX, Creative Data Company*

Automated testing further accelerates iteration. Rather than relying on small-scale manual exposure panels, AI-powered systems evaluate multiple creative treatments simultaneously, leveraging historical performance patterns to simulate audience response. This significantly shortens the feedback loop between concept development and validation.

Centralization of production tools, combined with integrated feedback systems, reduces both cost and time-to-market. When creative intelligence platforms connect directly with creative production environments, optimization recommendations flow back into design workflows in near real time, enabling continuous creative refinement.

In some cases, panel data and synthetic audiences are used during pre-testing to conserve media budgets. However, live panels segmented by audience and persona are often preferred, as they provide a more reliable proxy for real-world creative effectiveness.



#### IN-FLIGHT: REAL-TIME ACTIVATION AND OPTIMIZATION

During campaign execution, creative intelligence enables a level of optimization that extends beyond the capabilities of traditional, rules-based DCO. Adaptive creative deployment dynamically adjusts asset selection based on real-time performance signals, contextual factors such as location or time of day, in-session audience behavior, and historical performance patterns for similar segments.

At scale, personalization becomes operationally feasible. For high-value or returning audiences, the system selects creative variants optimized to individual attributes and prior engagement history. Modular creative assembly supports component-level personalization where fully bespoke assets are unnecessary. Critically, this allows creative execution to economically match the granularity already achieved within customer data and analytics environments.

Where supported by media platforms, mid-flight optimization uses near-real-time insight to refine messaging, replace underperforming creative elements, and shift spend toward higher-performing asset variants. Leading organizations increasingly execute these optimization cycles continuously rather than waiting for scheduled campaign reviews.

Creative fatigue management tracks performance trajectories over time, identifying declining engagement even when absolute performance remains acceptable. By triggering asset rotation before material degradation occurs, systems help preserve campaign efficiency throughout the flight period.

Budget optimization integrates creative quality directly into media allocation decisions. Instead of directing spend solely toward efficient audience segments, creative intelligence considers the interaction between creative effectiveness and targeting, allocating incremental budget to combinations where both perform strongly.

### POST-ACTIVATION: MEASUREMENT AND LEARNING

Following campaign completion, comprehensive analysis contributes to cumulative organizational learning. Creative contribution analysis isolates the effect of creative decisions from media and audience variables, quantifying the portion of performance attributable to asset quality rather than placement or targeting alone.

Integration with Marketing Mix Modeling further extends measurement by incorporating creative variables into broader effectiveness analysis expanding beyond media. Advanced implementations estimate incremental sales impact attributable to specific creative approaches, strengthening creative ROI assessment. However, incorporating raw creative data—such as asset metadata—into MMM requires careful model design. Because these models often emphasize impression-based inputs, there is a risk that creative impact may be underrepresented unless measurement partners properly balance creative and media variables.

Creative lifetime value measurement evaluates asset effectiveness over extended periods, calculating total value delivered and identifying optimal refresh intervals. This supports more informed creative investment decisions by demonstrating the sustained contribution of high-quality assets.

**“Effective creative evaluation requires integrating attention, emotional response, brand linkage, and sales impact into a single, validated framework—rather than relying on any one signal in isolation.”**

*– Creative and Media Lead of  
Marketing Data, Insights, and Analytics Company*

Where available, competitive creative benchmarking provides additional category context. Comparing effectiveness against competitors employing similar media and targeting strategies helps calibrate expectations and highlight improvement opportunities.

Finally, systematic knowledge base development captures insights in a structured manner rather than relying on institutional memory. Documenting which creative approaches work for specific objectives, audiences, and contexts accelerates future briefing and campaign development.

### AGENTIC AI APPLICATIONS

Agentic AI capabilities are fundamentally reshaping creative operations through autonomous testing, optimization, and auditing. Asset testing agents can continuously evaluate creative variants, automatically scaling high performers and retiring underperformers without human intervention for routine optimizations.

Brief-generation agents combine historical performance data, category benchmarks, and campaign objectives to produce data-informed creative briefs. While human creativity remains central to conceptual development, AI can assume responsibility for pattern identification and analytical groundwork.

Performance forecasting agents estimate likely outcomes prior to launch by evaluating creative characteristics, media plans, and audience targeting. When embedded within activation platforms, these agents tend to influence tactical optimization; when deployed upstream, they contribute to longer-term planning and budget forecasting.

Optimization recommendation agents monitor live campaigns and generate actionable guidance—identifying which assets to promote or suppress, when refresh is required, where additional variants would add value, and how budget reallocation could improve overall effectiveness.

### MEASURABLE OUTCOMES ACROSS THE FUNNEL

Creative intelligence delivers measurable improvement across campaign objectives and informs broader marketing investment decisions. For awareness initiatives, outcomes include higher brand lift, improved attention and viewability, stronger engagement, and increased message recall and brand association.

Mid-funnel campaigns benefit from increased site visitation, deeper content engagement, improved lead quality and conversion rates, stronger consideration metrics, and more efficient cost-per-consideration across channels.

For conversion-focused activity, optimized creative reduces cost-per-acquisition, increases conversion rates for identical audience targeting, supports higher average order values through clearer value communication, and improves customer lifetime value for newly acquired audiences.

Improvements at each stage compound across the funnel, amplifying overall campaign effectiveness. Beyond channel-level metrics, organizational adoption of creative intelligence enables creative investment to be treated as a long-term driver of commercial value—supporting sustained excellence in marketing and advertising performance.

## SECTION IV

### KEY COMPONENTS FOR CREATIVE INTELLIGENCE ADOPTION: PEOPLE, PROCESS, AND TECHNOLOGY INVESTMENTS

People: Roles, Skills, and Organizational Structure

#### ORGANIZATIONAL CAPABILITIES AND EVOLVING ROLES

Successful adoption of Creative Intelligence requires the development of new capabilities alongside the evolution of existing roles within marketing organizations. Value creation increasingly occurs at the intersection of disciplines that have historically operated independently.

New role requirements are emerging at this intersection. **Creative engineers** combine analytical rigor with creative sensibility, interpreting performance data while understanding aesthetic, emotional, and narrative dimensions that may be overlooked by traditionally media-centric analysts. These individuals typically require proficiency across data analysis and statistical methods, an understanding of creative strategy and brand development, marketing technology platforms, and cross-functional communication.

Many organizations are also identifying a gap for **marketing technologists focused on creative systems**. Unlike marketing technologists who specialize in audience data and activation platforms, these roles center on creative production workflows, asset management, and the integration of creative and media technologies. Responsibilities often include platform evaluation and integration, creative data governance, workflow optimization, and vendor management.

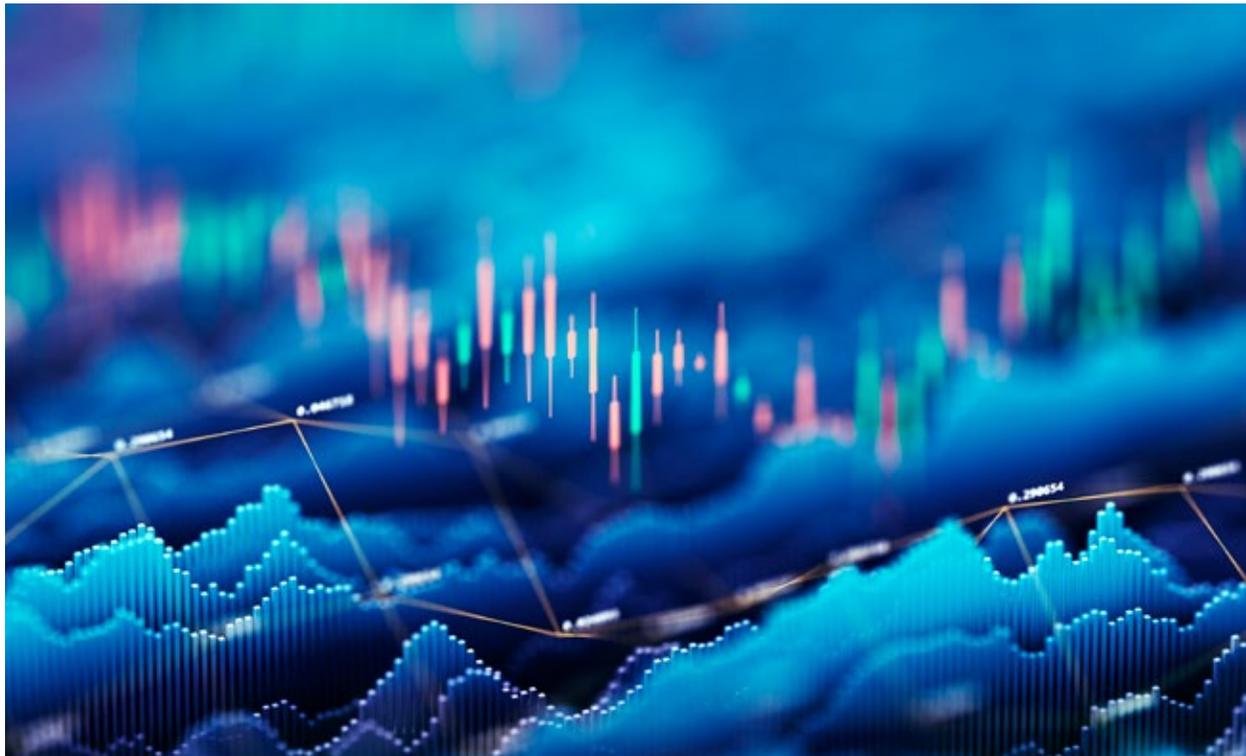
**Creative strategists** must similarly evolve. While intuition and experience remain essential, these roles increasingly require comfort with high-volume, data-driven insight to inform creative direction. Creative Intelligence augments—rather than replaces—judgment by grounding strategic decisions in performance evidence.

**Media planners and buyers** face expanded responsibilities as creative performance becomes inseparable from media effectiveness. Media teams must develop fluency in creative elements that drive outcomes and understand how creative quality influences channel efficiency. The traditional model—where media teams receive creative assets as fixed inputs—gives way to collaborative optimization across disciplines.

**"Best suited are people who sit between analytics and creativity—part analyst, able to form hypotheses and interrogate data; part strategist, translating insight into direction and narrative; and part creative, able to turn insight into campaign ideas."**

*- VP of Creative Strategy, Digital Marketing and Advertising Company*

Organizational structure plays a critical role in enabling this shift. Enterprises realizing the greatest value from Creative Intelligence have adopted integrated operating models, including cross-functional pods aligned to brands or campaigns, creative centers of excellence with embedded analytics, and performance teams jointly accountable for both creative and media outcomes.



## PROCESS: WORKFLOWS AND OPERATING RHYTHMS

Process change is as important as technology adoption. Creative Intelligence requires workflows that connect activities previously managed in isolation.

**Integrated briefing** becomes foundational. Instead of creative briefs developed independently from media plans, joint planning sessions bring together creative strategy, audience targeting, and media allocation. Creative Intelligence data informs these discussions, identifying which approaches have historically worked for specific audiences and highlighting optimization opportunities before production begins.

The **brief-to-activation timeline** compresses significantly. Traditional sequential handoffs—strategy to creative to production to trafficking to activation—are replaced by parallel workflows, where creative production and media planning proceed concurrently, informed by shared performance data.

**Continuous optimization** replaces episodic campaign reviews. Teams (the combination of agency and brand leads) will conduct frequent optimization sessions, often weekly, reviewing performance and making real-time adjustments to creative, messaging, and budget allocation. These sessions typically include both creative and media stakeholders.

Governance processes must also adapt. Automated pre-testing against brand and compliance guidelines enables faster approvals for assets meeting predefined standards, while escalating exceptions for human review. This allows governance to scale without introducing bottlenecks.

**Knowledge capture** becomes a formalized process. Structured post-campaign retrospectives document which creative approaches worked, why performance exceeded or underperformed expectations, and where future opportunities exist. This institutionalizes learning rather than relying on informal memory.

Taken together, these shifts signal a functional reunification of creative and media capabilities after decades of separation. Whether through organizational restructuring or leadership models spanning both domains, creative and media become operationally codependent in ways not seen previously.



## TECHNOLOGY: PLATFORM REQUIREMENTS AND INTEGRATION ARCHITECTURE

Technology investment spans Creative Intelligence platforms and supporting infrastructure. Core capabilities typically include asset ingestion and creative data extraction, integration with advertising platforms for performance data, predictive scoring and recommendation engines, reporting tailored to different stakeholders, and API-based ecosystem connectivity.

Platform selection depends on organizational scale and complexity. Enterprise environments often require platforms capable of supporting multiple brands, business units, and governance frameworks. Smaller organizations may prioritize focused solutions addressing specific needs such as pre-testing or in-flight optimization.

Integration architecture is central to value realization. Required integrations typically include Digital Asset Management systems for bidirectional asset flow; advertising platforms for creative activation and performance data; CDPs or data warehouses for audience intelligence; ad servers for delivery metrics; and measurement platforms to enrich attribution and Marketing Mix Models with creative variables.

**"The real value comes from integrations into the tools marketers already use—media buying platforms, creative production systems, DSPs, CDPs, and data infrastructure."**

*- Head of Marketing, Creative Data Company*

Architectural approaches vary. **Point-to-point integrations** offer simplicity but may increase maintenance complexity over time. **Hub-and-spoke models** position Creative Intelligence platforms as central connectors with standardized integrations. **Data lake approaches** centralize creative, audience, and performance data, enabling analysis within shared repositories.

**"Unless everything is connected, the value really isn't there."**

*- CTO of AdTech Company*

## INTERNAL VERSUS EXTERNAL RESOURCES

Organizations face build-versus-buy decisions at multiple levels. While some enterprises may attempt to build Creative Intelligence platforms internally, complexity and specialization suggest that commercial platforms will dominate, with creative data and derived insights often treated as strategic assets.

**Managed service models** combine technology and operational expertise, offering a strong entry point for organizations early in their journey. However, overreliance may limit internal capability development.

**Platform licensing with internal operation** provides greater control but requires investment in skilled personnel. **Hybrid models**, blending vendor platforms, internal teams, and external

advisory support, are likely to be the most common approach among mature adopters.

Many organizations will sequence capability development—starting with managed services, then transitioning toward internal ownership as expertise grows.

### INVESTMENT SEQUENCING AND PILOT APPROACHES

Given the breadth of change required across people, process, and technology, successful adoption typically follows a phased approach:

- **Phase one** focuses on measurement and insight generation, connecting platforms to existing campaigns and building historical datasets.
- **Phase two** introduces pre-testing and predictive scoring, embedding performance learnings into briefs and creative development.
- **Phase three** enables real-time optimization and automated creative management during live campaigns.
- **Phase four** achieves full lifecycle integration, with creative and media operating as a unified function.

Enterprises commonly require 18–24 months to move from pilot to scaled deployment. Attempts to accelerate this timeline often underestimate change management requirements.

Pilot programs are most effective when targeted at high-impact use cases. Paid social, email, messaging, and programmatic display or video offer controlled environments with strong integration potential. Successful pilots establish clear success metrics, secure executive sponsorship, ensure cross-functional participation, allocate sufficient resources, and define clear paths to scale.

### CHANGE MANAGEMENT AND ADOPTION BARRIERS

Creative Intelligence adoption frequently encounters resistance. Creative teams may fear loss of autonomy; media teams may resist responsibility for creative performance; analytics teams may struggle with non-quantitative dimensions; agencies may worry about value commoditization.

Effective change management emphasizes augmentation rather than replacement. Creative Intelligence informs decisions but does not eliminate creative judgment. By reducing repetitive execution, it allows teams to focus on higher-value strategic work.

Building cross-functional literacy helps dissolve silos. Creative teams benefit from understanding media optimization metrics; media teams gain from creative fundamentals; analytics teams expand by developing creative vocabulary.

**“Talent and training are critical with anything related to AI. Adoption depends on how initiatives are communicated internally and whether people understand the value.”**

*– VP of Strategy, Digital Marketing and Advertising Company*

Executive sponsorship is essential. Without clear leadership commitment, initiatives stall when encountering organizational friction. Sponsors must articulate vision, allocate resources, enforce collaboration, and visibly reinforce success.

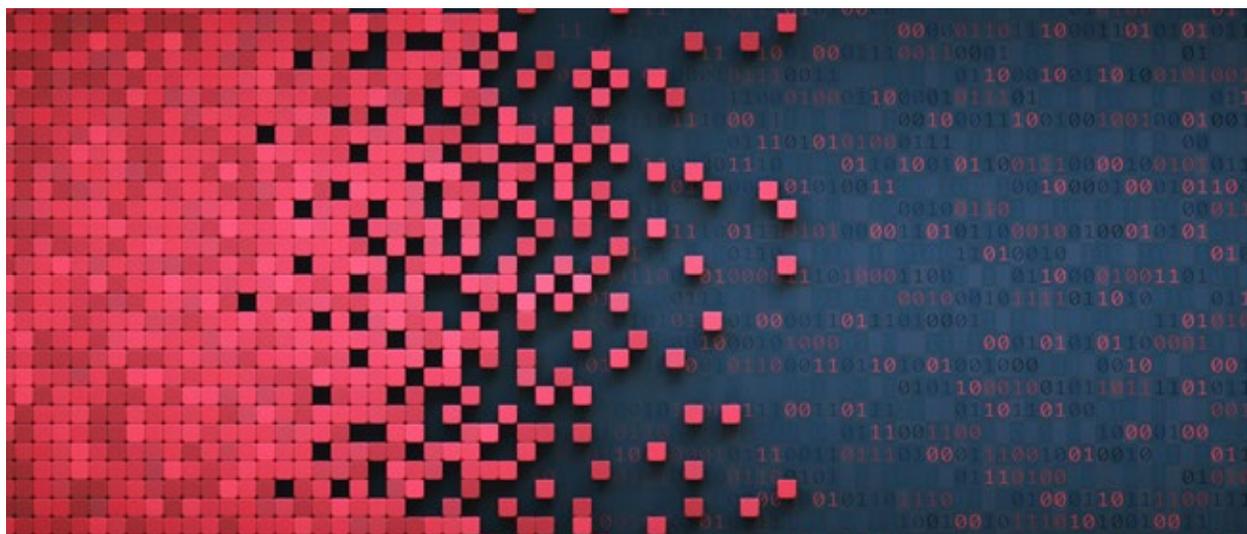
### MEASURING ADOPTION SUCCESS

Success metrics for Creative Intelligence should extend beyond campaign outcomes to include operational and strategic indicators.

**Operational metrics** include reductions in time-to-brief, improved asset utilization, production cost efficiency, and speed-to-optimization.

**Strategic metrics** include creative contribution to marketing ROI, growth of institutional knowledge bases, increased cross-functional collaboration, and maturity of organizational capabilities.

Through 2026, Creative Intelligence success will increasingly be measured not only by ROI outcomes, but by the proportion and frequency of marketing decisions materially influenced by Creative Intelligence insights.



## SECTION V

### PRICING MODELS FOR CREATIVE INTELLIGENCE

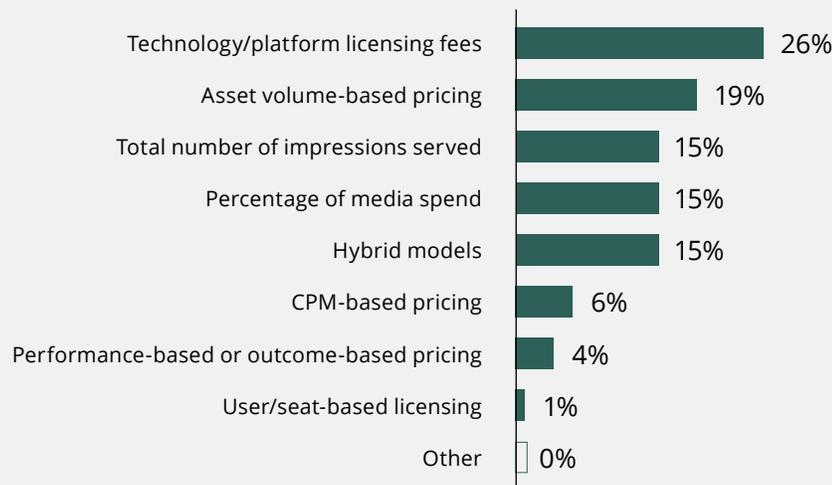
Given the early stage of Creative Intelligence adoption, both interview findings and survey results indicate the coexistence

of multiple pricing models across the ecosystem. Current approaches include technology and platform licensing fees, CPM-based pricing, cost-per-asset structures, and impression-based models. These models reflect differing points of value capture across the creative lifecycle and the absence of a single, standardized commercial framework.

**FIGURE 6 – TECHNOLOGY/PLATFORM LICENSING AND ASSET VOLUME BASED PRICING ARE THE TOP PRICING MODELS UTILIZED BY ORGANIZATIONS TODAY**

**What pricing models does your organization currently use to provide creative data, analytics and intelligence solutions for brands (for creative development and testing, activation or optimization)?**

*(% of Respondents; US/UK; 2025)*



Source: Winterberry Group Survey N=125 (2025)

A core challenge lies in the fact that distinct stages of the creative process—concept development, pre-testing, activation, optimization, and measurement—draw on technology and human capital in fundamentally different ways. As a result, cost drivers vary significantly by use case. Compounding this complexity is the historical separation between creative services, audience data infrastructure, and media activation, each of which has traditionally been funded from different budget lines and governed by different stakeholders.

**“Where does the budget come from for this? What do you charge for it? A big part of the answer depends on system design. In some cases, clients want to move costs out of non-working media. Over the next two years, we expect to move toward pricing as a percentage of media.”**

*– EVP of Innovation and Growth,  
Digital Marketing and Advertising Agency*

Over the past two years, agencies and brands have actively worked to recombine capabilities that were previously fragmented across in-house and external teams. While earlier integration efforts

focused primarily on aligning audience data with media channel execution, attention is now shifting toward deeper integration between creative functions and media activation.

Market trajectory suggests that media planning—anchored in marketing effectiveness and accountable for performance outcomes—is emerging as the connective layer across creative, data, and activation. In this model, media increasingly serves as the owner of performance measurement, irrespective of where objectives are set along the marketing funnel.

At the same time, intensified pressure from the C-suite to deliver “more with less” or “more with the same” marketing budgets is acting as a forcing function. This pressure is accelerating the reintegration of creative investment into working media budgets, rather than treating creative as a fixed, upstream cost.

As Creative Intelligence platforms leverage AI to enable scalable asset production and generate high volumes of creative performance data, the market is progressively moving toward creative being priced as a percentage of working media. This shift reflects a broader reframing of creative—from a cost of production to a variable, performance-linked investment directly tied to marketing effectiveness.

## SECTION VI

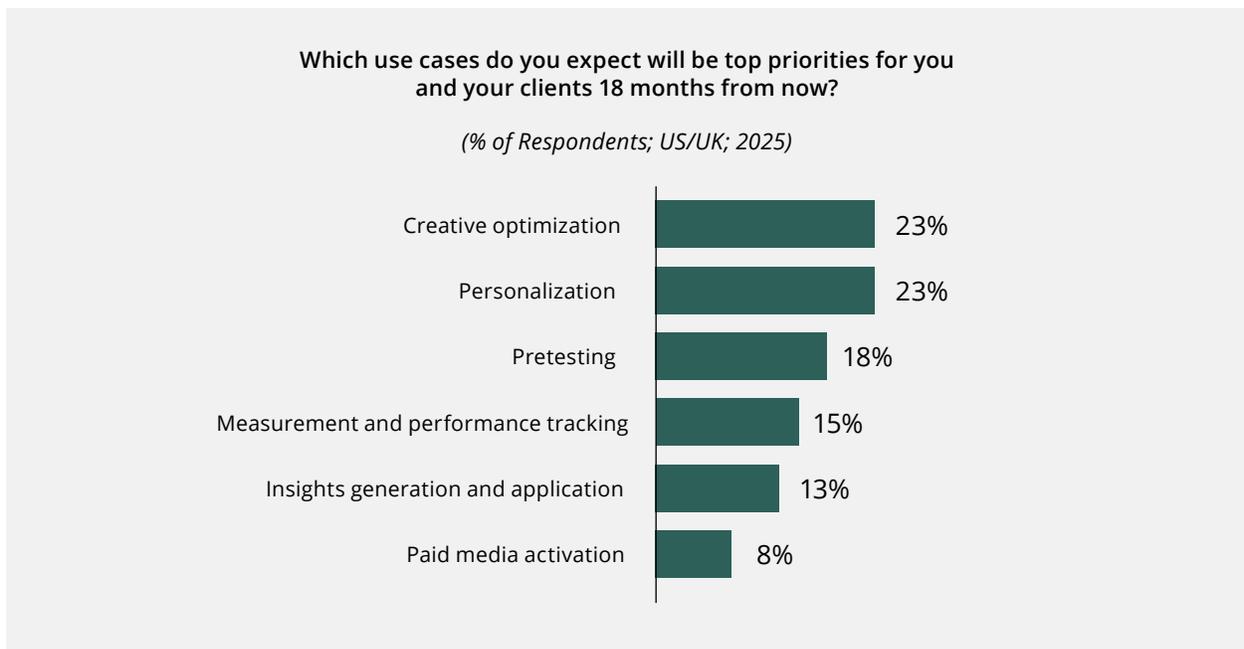
### THE RAPID EVOLUTION AND ADOPTION OF CREATIVE INTELLIGENCE-CONCLUSIONS AND KEY TAKEAWAYS

Unlike prior solution and channel adoption cycles, our expectation is that Creative Intelligence adoption will occur over a materially compressed timeframe. Historical benchmarks such as programmatic and mobile advertising required approximately five years each to reach broad market penetration. By contrast, the rapid and pervasive adoption of AI—spanning both large

language models and machine-learning-based systems—suggests a significantly accelerated trajectory. Over the next 18 months, the market is likely to experience step-level change, with the majority of adoption occurring within a three-year horizon.

To better understand the implications of this acceleration, our analysis begins with use cases and how adoption is expected to unfold over a relatively short 18-month window. While personalization currently ranks lower among active deployments, it is expected to emerge as a primary driver of demand as capabilities mature. Pre-testing follows closely, supported by lower implementation complexity and cost, making it an accessible entry point for many organizations.

**FIGURE 7 – CREATIVE OPTIMIZATION, PERSONALIZATION AND PRETESTING WILL BECOME TOP USE CASES IN 2027**



Source: Winterberry Group Survey N=125 (2025)

A second key takeaway is that organizations moving aggressively today are likely to sustain their leadership position. Early adopters are expected to mature more rapidly, widening the performance

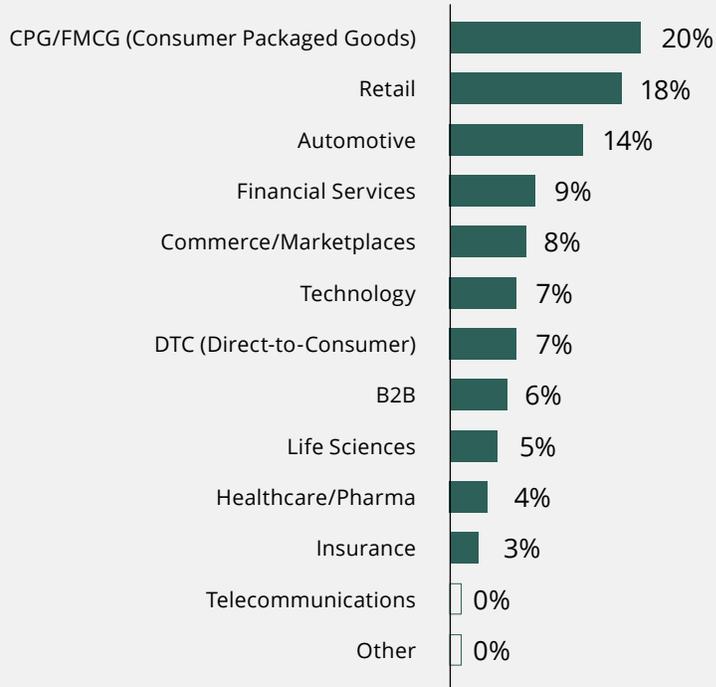
gap relative to later entrants. Over time, this divergence is likely to translate into meaningful and durable advantages in marketing effectiveness.



**FIGURE 8 – CPG/FMCG AND RETAIL REMAIN TOP VERTICALS TO ADOPT CREATIVE INTELLIGENCE SOLUTIONS IN THE FUTURE**

Which verticals do you expect to be furthest along in adopting creative intelligence in 18 months?

(% of Respondents; US/UK; 2025)



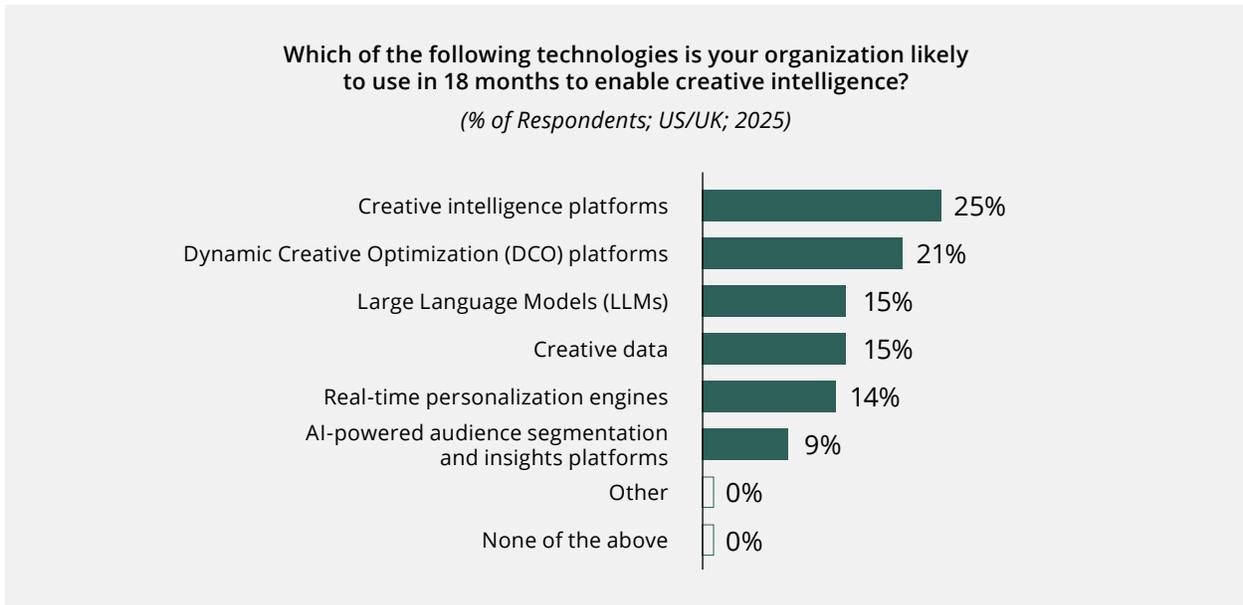
Source: Winterberry Group Survey N=125 (2025)

Technology adoption represents a third driver of market transformation. Creative Intelligence platforms are forecast to lead future deployments, reflecting demand for end-to-end

orchestration and insight. At the same time, Dynamic Creative Optimization remains embedded in many activation environments and is not expected to be displaced in the near term.



**FIGURE 9 – CREATIVE INTELLIGENCE PLATFORMS AND DCO WILL REMAIN TOP TECHNOLOGIES ADOPTED IN THE FUTURE**

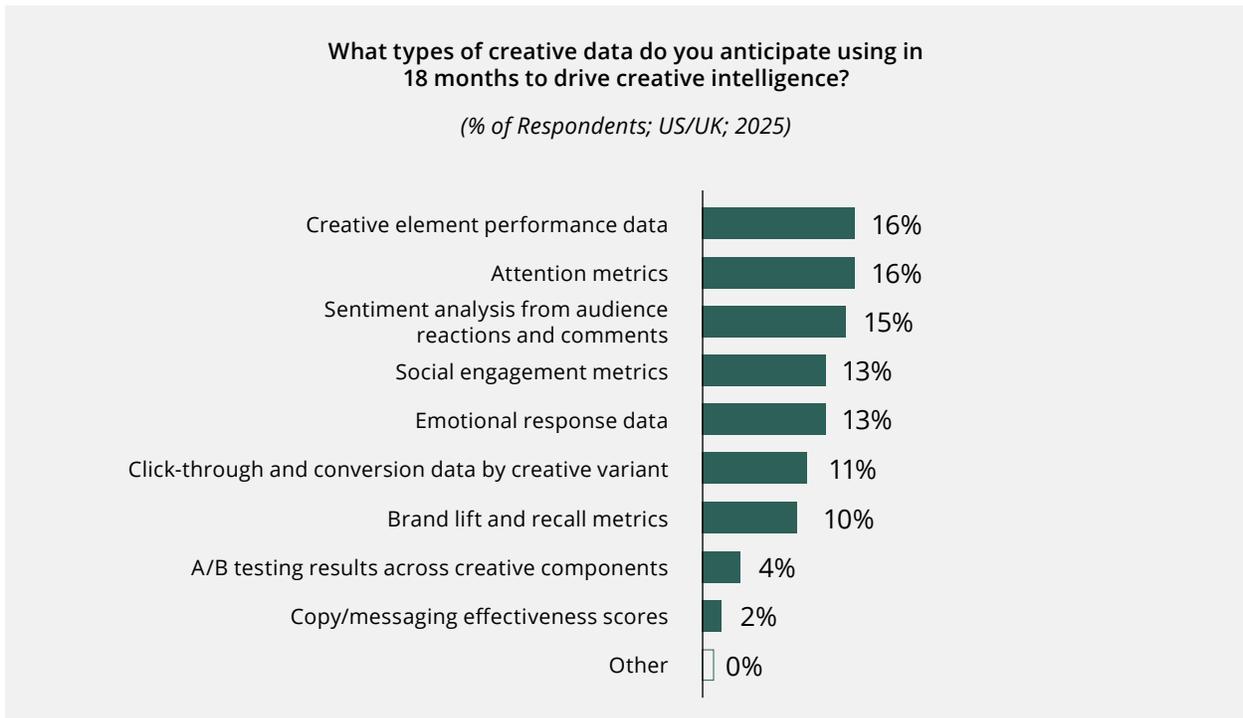


Source: Winterberry Group Survey N=125 (2025)

Finally, the types of creative data utilized will continue to vary based on use case, campaign objectives, and the underlying technology stack. As Creative Intelligence matures, data diversity

will increase rather than converge, reinforcing the need for flexible architectures capable of supporting multiple analytical approaches.

**FIGURE 10 – CREATIVE PERFORMANCE DATA, ATTENTION, SENTIMENT AND SOCIAL ENGAGEMENT REMAIN THE TOP TYPE OF CREATIVE DATA IN THE FUTURE**



Source: Winterberry Group Survey N=125 (2025)

## SIZING THE MARKET

Given clear signals that the market has entered a rapid adoption cycle, Winterberry Group has developed a market sizing model aligned to expected adoption patterns. We anticipate that small and medium-sized businesses will continue to favor walled-garden solutions, where lower operational complexity and campaign volume align with integrated, platform-native capabilities. In these environments, media spend remains the primary cost driver, even as creative versioning becomes easier and more automated.

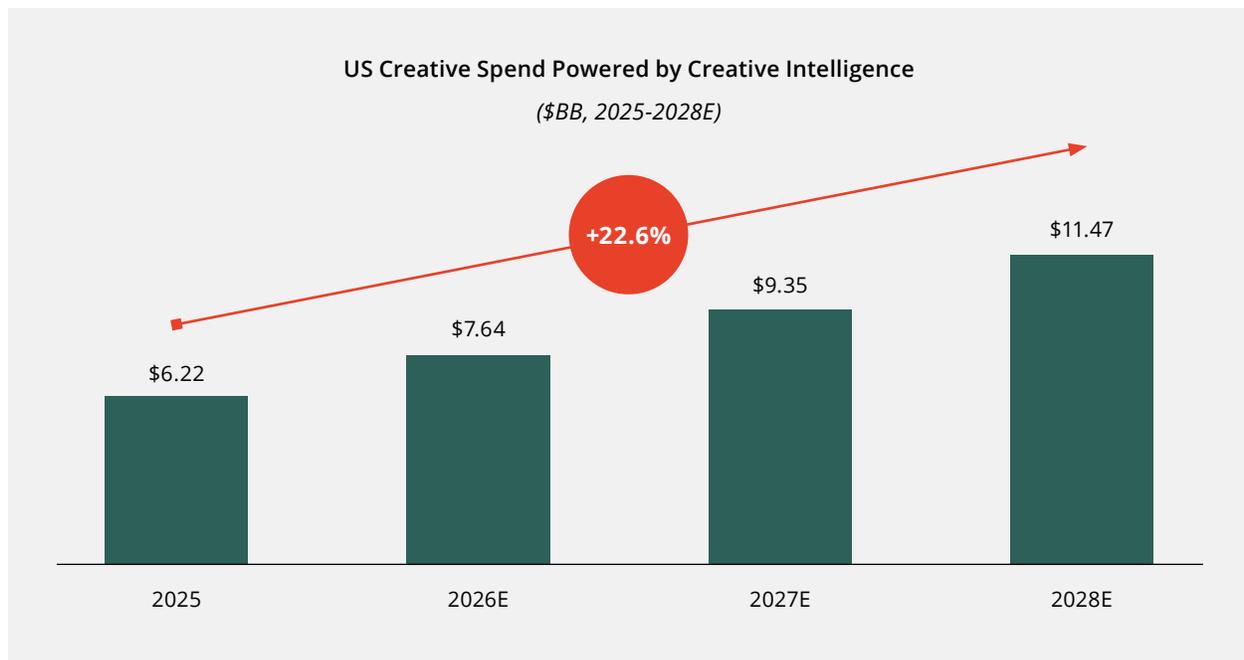
As a result, the majority of Creative Intelligence-driven adoption is expected to originate from mid-market, upper mid-market, and enterprise advertisers. Mid and upper mid-sized organizations are likely to adopt more rapidly, benefiting from fewer organizational barriers and greater reliance on integrated agency models or hybrid in-house and partner structures.

Enterprise marketers face a more complex challenge. Adoption requires not only vendor integration, but also meaningful transformation of internal processes, organizational design, governance structures, and cross-functional operating models. As these barriers are addressed, enterprise adoption is expected to accelerate in later phases of the cycle.

Looking toward the three-year market outlook, we expect pricing models to continue evolving. Pre-testing and asset testing are likely to be supported through a combination of retainers and technology licensing, including implementation fees required to deploy and integrate end-to-end solutions. At the same time, pricing is expected to shift away from asset- and impression-based models—which are difficult to align with outcome-driven budgeting—toward creative priced as a percentage of media spend.

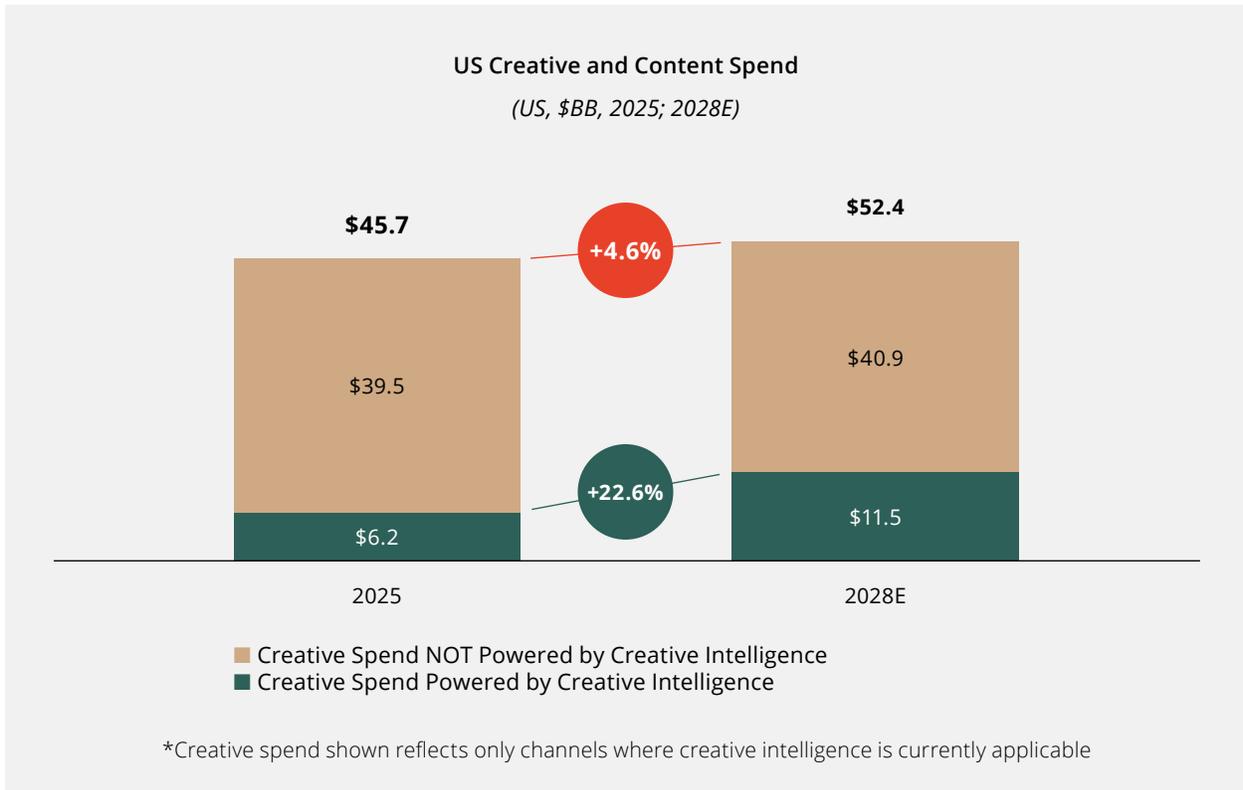


**FIGURE 11 – US CREATIVE INTELLIGENCE-POWERED CREATIVE SPEND IS EXPECTED TO GROW AT A ~23% CAGR THROUGH 2028**



WG Market Model 12.25

**FIGURE 12 – CREATIVE SPEND IS RAPIDLY TAKING SHARE OF CREATIVE AND CONTENT SPEND**



While current market sizing excludes concepting and pre-testing spend, we anticipate that by 2027–2028 these capabilities will be increasingly embedded within Creative Intelligence platforms as the category matures. Over time, this integration will further ex-

pand the addressable market and reinforce Creative Intelligence as a core component of modern marketing infrastructure. Over the next decade WG expects that creative intelligence will be applied to more than 60% of all annual creative and content spend.

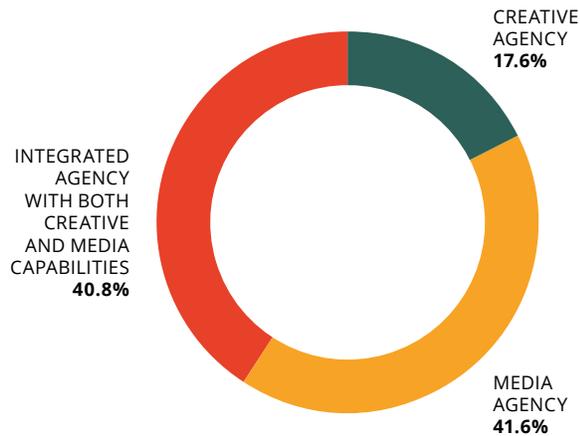
Thank you for taking the time to read this research paper, the second in a series of research work designed to deeply assess the data, technology, the market size and requirements for organization maturity.

## METHODOLOGY

The conclusions in this report are based on the results of a comprehensive primary research effort conducted by Winterberry Group between October and December 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, and others. Additionally, it incorporates responses from a survey of more than 120 creative and media agency leaders from the US and UK.

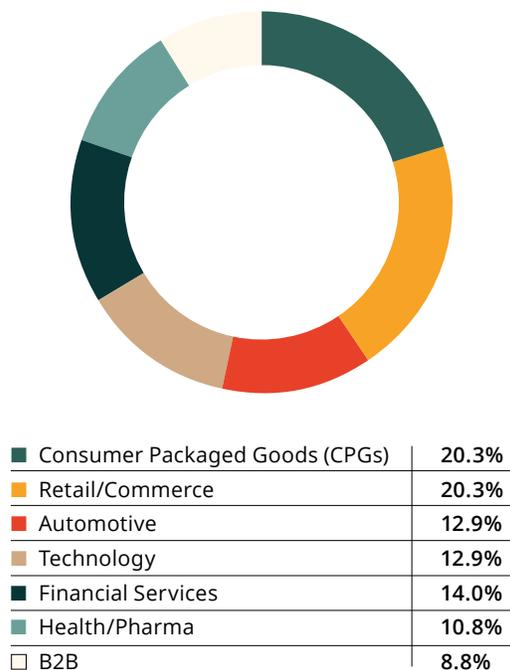
### Which of the following best describes your organization's primary business focus?

(% of Respondents)



### Which industry verticals do your clients most commonly represent?

(% of Respondents)



### Distribution of Respondents by Country

(% of Respondents)



### Which of the following best describes your current role or title?

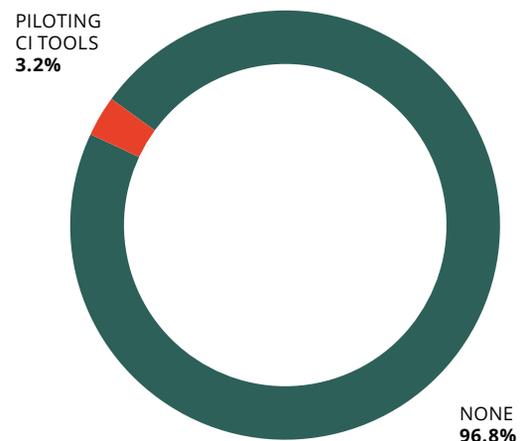
(% of Respondents)



Vp of Creative Strategy	41.6%
Head of Media/Head of Media Strategy	32.8%
Vp of Media Strategy/Planning	24.0%
Chief Strategy Officer/Head of Strategy	1.6%

### Which best describes your agency's current engagement with Creative Intelligence (CI)?

(% of Respondents)



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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.

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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](https://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](https://vidmob.com)

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AppsFlyer is the Modern Marketing Cloud that helps businesses transform complex data into clarity and growth. A foundation for unified, measurable, autonomous marketing, AppsFlyer breaks down silos across measurement, deep linking, data collaboration, and autonomous AI workflows. For more than a decade, AppsFlyer has been the leader in mobile attribution, trusted by over 15,000 businesses worldwide.

Learn more at [appsflyer.com](https://appsflyer.com)



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](https://aprco.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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