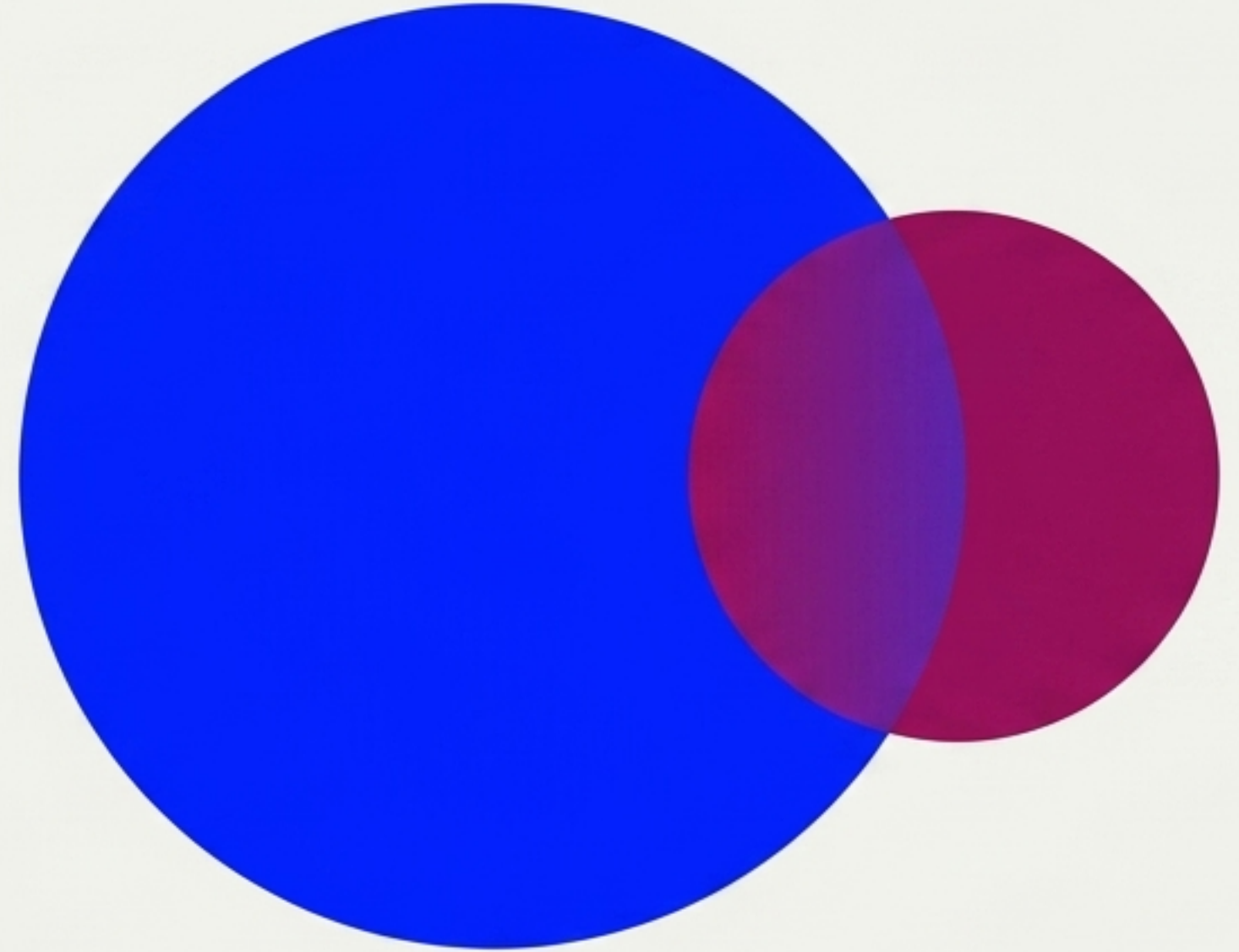
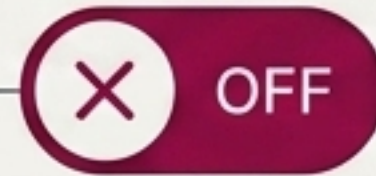


**Is digital marketing becoming the dominant or only form of marketing?**



# Short Answer: Dominant — Yes. The Only One — No.

Dominant



Only

Digital channels already represent the absolute majority of advertising markets (>70% globally), but marketing is not moving toward a 100% digital model.



## Budget Dominance

Digital media is growing rapidly, systematically absorbing traditional formats like TV and outdoor advertising.



## The Physical Imperative

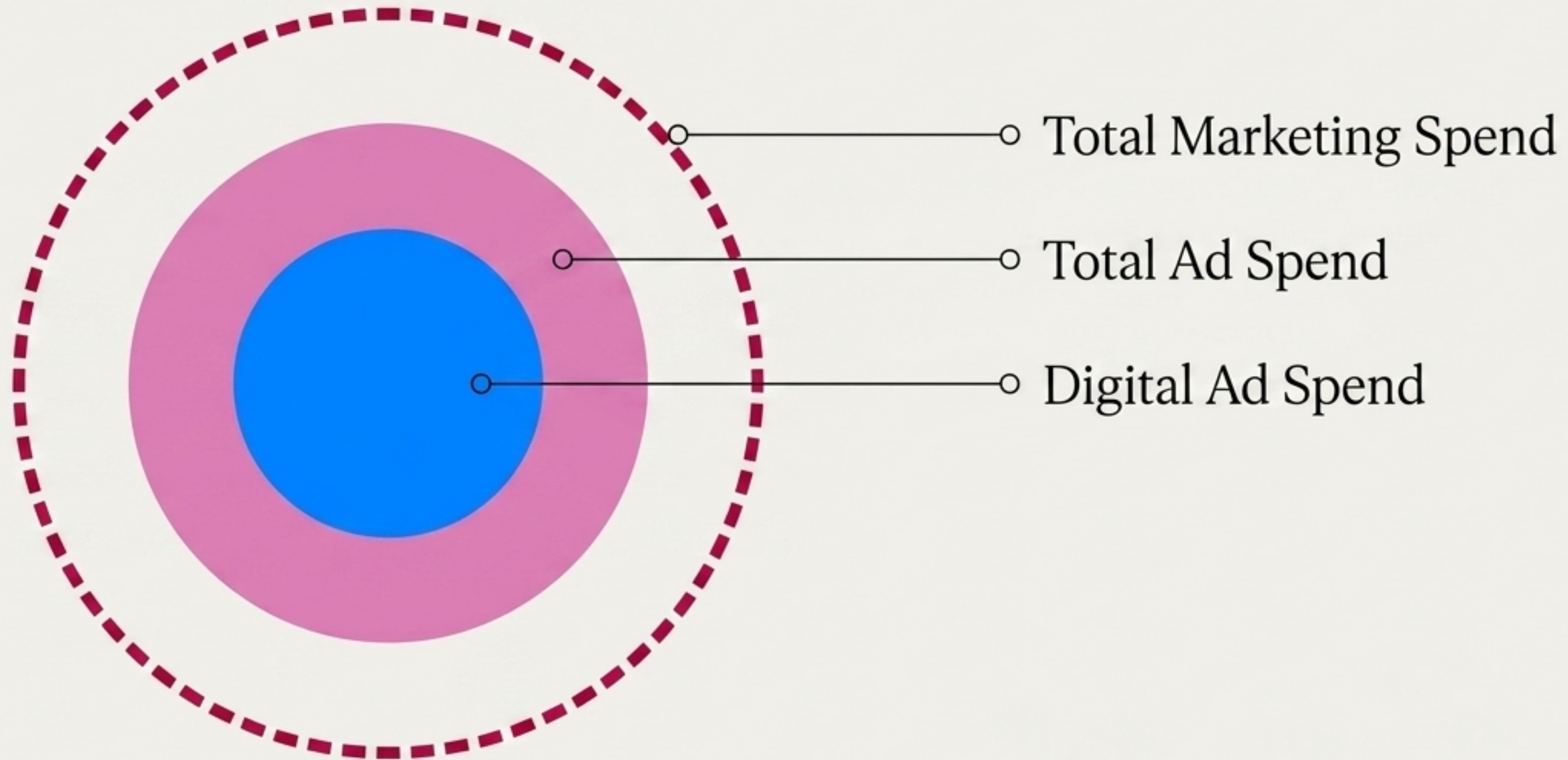
Brand building, establishing trust, and achieving broad, resilient reach still demand offline, physical touchpoints.



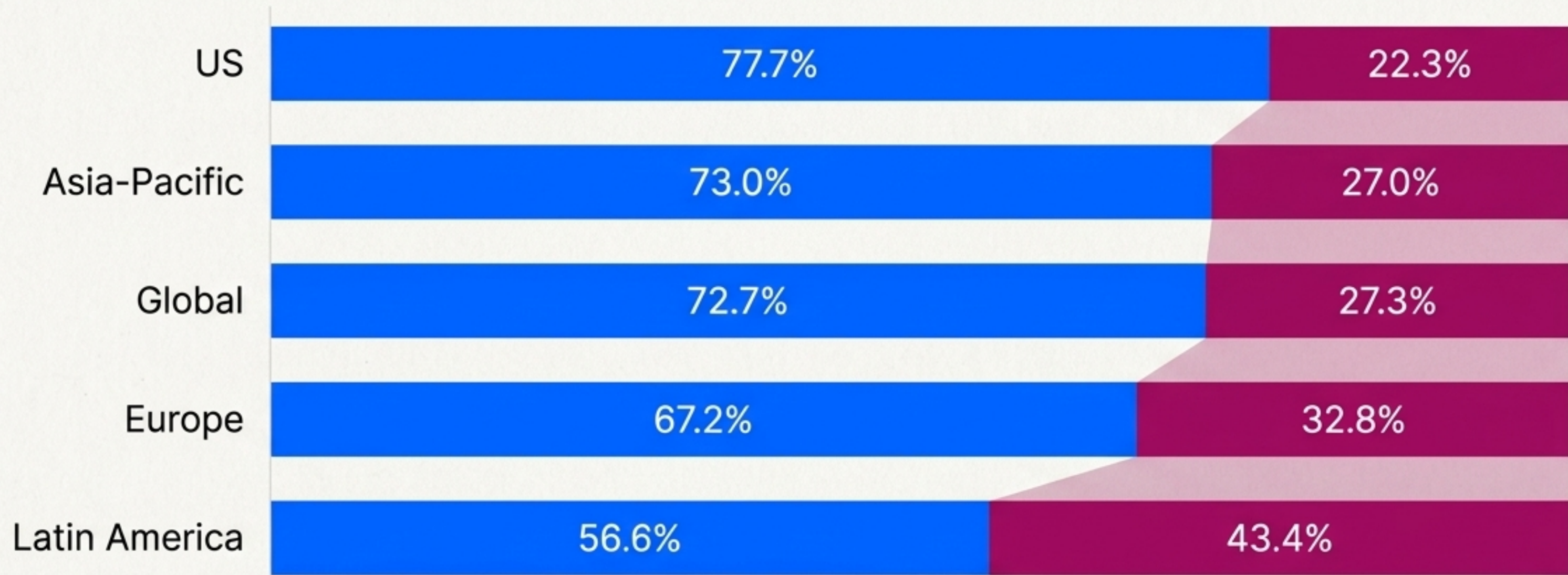
## The New Reality

The future of marketing is strictly hybrid—powered by Artificial Intelligence (AI) but fundamentally constrained by evolving privacy regulations.

# Mapping the Ecosystem: The 3 Levels of Marketing Spend



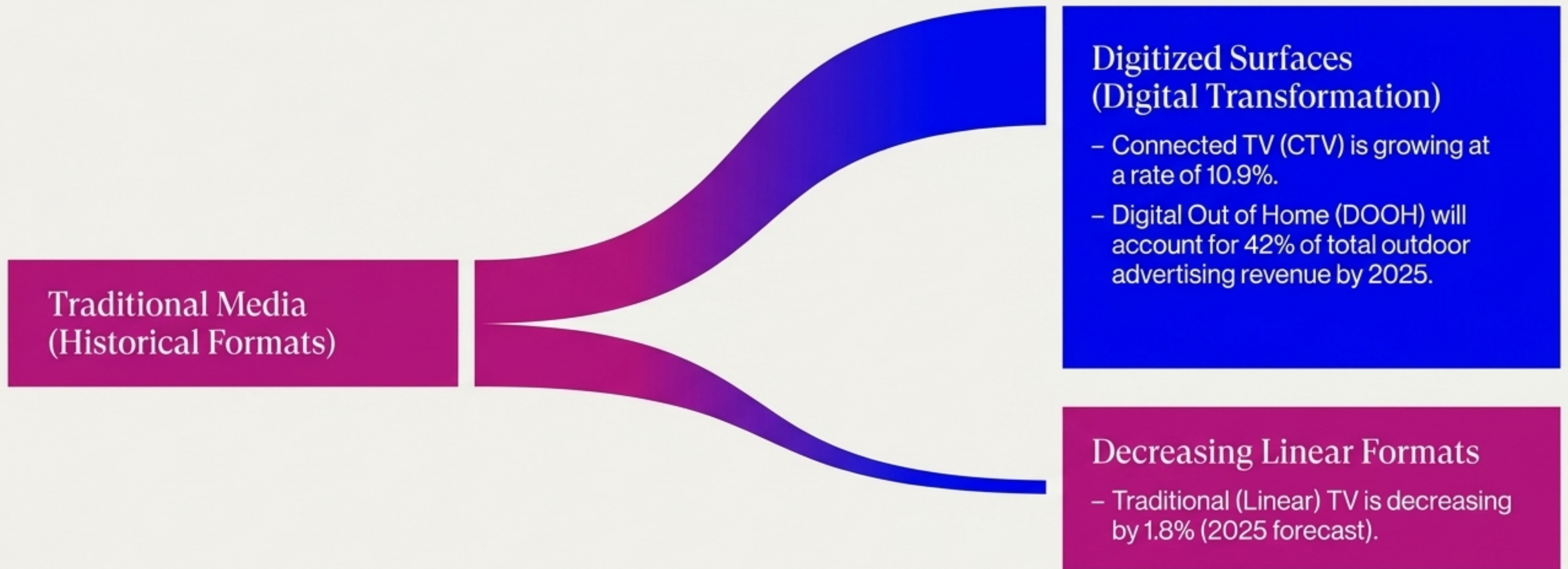
# Digital dominance is an established global reality



Data Source: Global Ad Spend Reports, 2024.

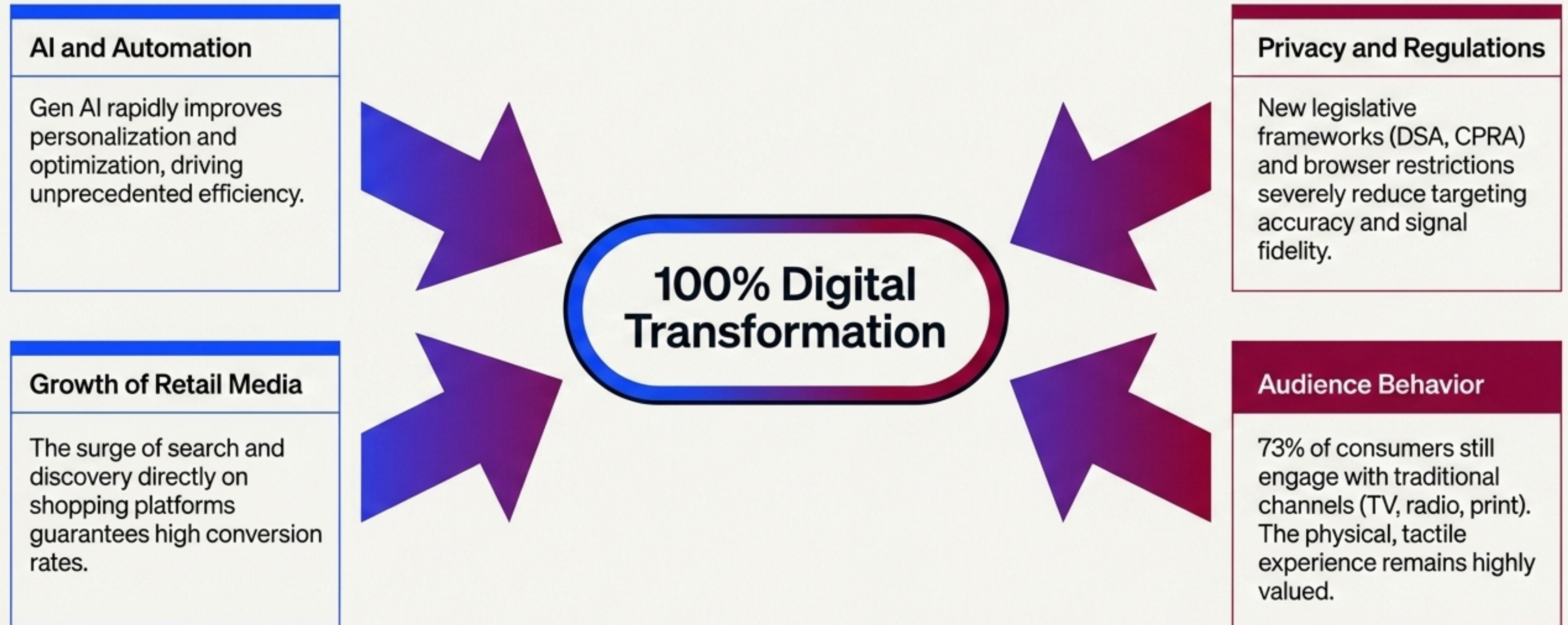
**Conclusion:** Despite absolute dominance, non-digital media persistently retains ~22-43% of the market. This holdout is vitally important for achieving full, saturated audience coverage.

# Traditional media isn't disappearing—it is digitizing



The question is no longer 'Digital vs. Traditional.' The primary strategic question is what percentage of legacy formats can now be digitally measured and automated.

# The friction of transformation: Accelerators vs. Inhibitors



# Strategic recommendations by budget and operational scale



## Early-stage / Small Budget

- Strategy: 100% Digital.
- Priority: Rapid testing, learning, and immediate ROI.



## Growth-stage

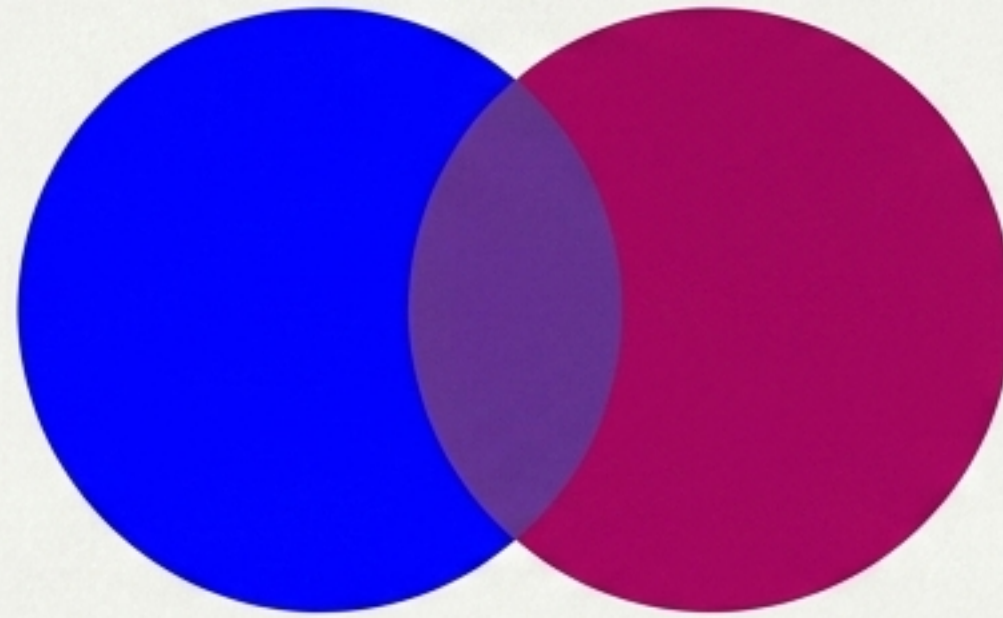
- Strategy: Digital-dominant. Focus on market saturation.
- Hybrid Application: Selective **Out-of-Home (OOH)** and the implementation of initial **Media Mix Modeling (MMM)**.



## Established Brands & Regulated Industries

- Strategy: True Hybrid Model. Digital serves as the base; offline acts as the reach and trust amplifier.
- Hybrid Application: Heavy reliance on Sponsorships, Live Events, and CTV. Goal: Maximizing institutional trust and ensuring strict regulatory compliance.

# Digital is the center of gravity, but not the only world



**Fact 1:** Digital marketing is already the primary engine for budget and operations across nearly all global regions and industries.

**Fact 2:** However, it will fundamentally not become a 100% exclusive format within the next 3-5 years.

**The Main Lesson:** Offline channels provide unique institutional trust and necessary physical experiences. In an era defined by a measurability and privacy crisis, a digital-only approach is inherently unstable. The definitive future of marketing is hybrid.