











# 7 AI-Driven Advertising & Marketing Trends Shaping M&A

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## 1 Generative Search Optimization (GEO / AEO)











*As consumer discovery shifts from traditional search results to AI-generated answers, marketers are investing in technologies that ensure their brands remain visible within large language model responses*

Target	Description	Buyer / Investor
	<b>Captify</b> processes more than 1 billion daily search signals using AI to generate audience intent insights for advertisers. The acquisition strengthens <b>Verve</b> 's AI-driven targeting capabilities outside major walled gardens. (September 2025)	
	<b>Adobe</b> agreed to acquire <b>Semrush</b> for approximately <b>\$1.9 billion</b> to integrate AI-driven search intelligence and brand visibility analytics into Experience Cloud. The platform uses AI to analyze billions of search signals and optimize brand discoverability across both traditional search and generative AI environments. (November 2025)	
	<b>Trajaan</b> captures conversational search activity across both AI assistants and traditional search engines. The platform uses AI to identify emerging consumer intent signals earlier in the marketing funnel. (December 2025)	
	<b>Vantage Discovery</b> uses machine learning and AI-driven recommendation models to improve product discovery across ecommerce storefronts. <b>Shopify</b> acquired the platform to strengthen AI-powered search and merchandising capabilities for its global merchant ecosystem. (March 2025)	
	<b>HubSpot</b> acquired <b>XFunnel</b> to integrate AI-powered answer engine optimization into Marketing Hub. The platform uses AI models to track how brands appear within large language model responses such as ChatGPT and Gemini. (November 2025)	

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## 2 AI Decisioning & Real-Time Personalization Engines










Marketing technology platforms are shifting from rules-based automation toward AI decisioning systems capable of optimizing each customer interaction in real time

Target	Description	Buyer / Investor
	<b>Doti AI</b> provides conversational AI technology that personalizes digital commerce and mobile engagement experiences. <b>Salesforce</b> acquired the platform to expand its AI-driven customer experience capabilities within the Agentforce ecosystem. (November 2025)	
	<b>Loris</b> uses AI to analyze customer conversations and detect sentiment, intent, and behavioral signals. Integrated into <b>Contentsquare</b> , the platform strengthens AI-driven customer journey analytics and conversion optimization. (August 2025)	
	<b>Movable Ink</b> uses AI to dynamically personalize marketing content based on real-time behavioral and engagement signals. The acquisition adds a scalable AI-driven personalization engine to <b>STG</b> 's marketing technology portfolio. (June 2025)	
	<b>Braze</b> acquired <b>OfferFit</b> for approximately <b>\$325 million</b> to embed reinforcement learning AI into its customer engagement platform. The technology uses AI to determine the optimal message, offer, and timing for each individual customer interaction. (June 2025)	
	<b>Diginex</b> agreed to acquire AI-driven marketing engagement platform <b>Resulticks</b> in a multi-billion-dollar transaction. The platform orchestrates customer interactions across digital and physical channels using agentic AI frameworks. (June 2025)	

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## 3 Private Equity Buyouts of AI Marketing Platforms











Private equity firms are assembling larger AI-enabled marketing technology platforms through buy-and-build strategies that consolidate fragmented point solutions

Target	Description	Buyer / Investor
 <b>KANTAR MEDIA</b>	<b>H.I.G. Capital</b> purchased <b>Kantar Media</b> for approximately <b>\$1 billion</b> , gaining an AI-enabled platform for audience measurement and cross-media analytics across more than 60 markets. (August 2025)	
 <b>Shoptimised</b>	Private equity firm <b>LDC</b> invested in <b>Shoptimised</b> , whose platform uses AI to optimize ecommerce product feeds and paid shopping campaigns. (October 2025)	
 <b>Showpad</b>	<b>Vector Capital</b> merged <b>Showpad</b> with portfolio company <b>Bigtincan</b> to create a global AI-enabled revenue effectiveness platform serving customers in more than 50 countries. The combined platform uses AI to support sales coaching, content management, and field engagement. (October 2025)	
<b>Vervaunt:</b>	<b>Bridgepoint</b> -backed <b>IDHL</b> acquired ecommerce consultancy <b>Vervaunt</b> to expand its AI-enabled digital commerce and performance marketing capabilities. (November 2025)	Bridgepoint Group 
 <b>IAS</b>	<b>Novacap</b> acquired media verification platform <b>Integral Ad Science</b> in a <b>\$1.9 billion</b> transaction. IAS uses AI algorithms to detect advertising fraud, verify media quality, and protect brand safety across digital campaigns. (December 2025)	

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## 4 Agentic Go-To-Market & Autonomous Revenue Workflows






AI agents are increasingly automating marketing and sales processes traditionally performed by human team

Target	Description	Buyer / Investor
 ADAURIS	<b>Adauris</b> uses AI to generate and distribute B2B marketing content across niche digital channels, producing more than 10 million monthly impressions. <b>Landbase</b> acquired the company to automate AI-driven inbound demand generation. (August 2025)	
	<b>Bluebirds</b> uses AI to analyze LinkedIn signals and CRM data to identify high-intent prospects and automate outbound prospecting. The acquisition strengthens <b>Salesforce</b> 's AI-driven pipeline generation capabilities. (August 2025)	
 copy.ai	<b>Copy.ai</b> provides generative AI for drafting marketing content and outbound messaging. <b>Fullcast</b> acquired the platform to integrate AI-generated sales and marketing content into its go-to-market execution platform. (October 2025)	
 MadKudu	<b>MadKudu</b> provides AI-powered lead scoring and automated go-to-market workflows driven by predictive buyer intent signals. Integrated into <b>HG Insights</b> , the technology enhances AI-based revenue intelligence. (August 2025)	
 QUALIFIED	<b>Salesforce</b> acquired conversational marketing platform <b>Qualified</b> to deploy autonomous AI sales agents inside the Agentforce ecosystem. The technology uses AI conversations to qualify website visitors and automatically schedule sales meetings. (December 2025)	

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## 5 Content Supply Chain & Creative Automation








AI is transforming creative production into a scalable content supply chain capable of generating and optimizing marketing assets at machine speed

Target	Description	Buyer / Investor
 <b>Goldcast</b>	<b>Goldcast</b> uses AI to convert live event content into automated marketing assets such as highlight reels and social clips. The acquisition allows <b>Cvent</b> to scale AI-driven content creation for event marketing. (December 2025)	<b>cvent</b>
 <b>MagicBrief</b>	<b>MagicBrief</b> uses AI to analyze campaign performance data and identify which creative elements drive conversion. The acquisition connects AI creative analytics with <b>Canva</b> 's design tools. (June 2025)	<b>Canva</b>
 <b>MangoAI</b>	<b>MangoAI</b> uses AI algorithms to automatically optimize video advertising creative based on campaign performance data. <b>Canva</b> acquired the platform to embed AI-driven creative optimization inside its design ecosystem. (September 2025)	<b>Canva</b>
 <b>ON24</b>	<b>Cvent</b> acquired webinar and virtual event platform <b>ON24</b> for <b>\$400 million</b> . ON24 generates approximately \$138 million in revenue and uses AI to score audience engagement and automate marketing lead qualification. (December 2025)	<b>cvent</b>
 <b>streamr<sup>ai</sup></b>	<b>streamr.ai</b> generates connected TV advertisements using generative AI and can launch campaigns in under two minutes. <b>Magnite</b> acquired the technology to expand AI-powered creative production for CTV advertisers. (September 2025)	<b>Magnite</b>

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## 6 AI Governance, Brand Safety & Reputation Intelligence









As AI-generated media expands, marketers require tools that monitor digital narratives, detect misinformation, and protect brand reputation

Target	Description	Buyer / Investor
	<b>Chatmeter</b> uses AI sentiment analysis to monitor customer feedback and online reputation for multi-location businesses. The acquisition expands <b>Alchemer's</b> AI-driven customer experience platform. (September 2025)	
	<b>Greenbids</b> applies AI algorithms to optimize programmatic supply paths, reducing wasted advertising impressions and carbon emissions. The platform enhances AI-driven advertising efficiency within <b>Perion's</b> Perion One system. (May 2025)	
	<b>NewsWhip</b> uses AI models to analyze billions of engagement signals and predict which stories will go viral before reaching mainstream audiences. <b>Sprout Social</b> acquired the platform to strengthen AI-driven media intelligence. (July 2025)	
	<b>Sincera</b> uses AI analytics to evaluate the quality of advertising signals used in automated programmatic buying. The acquisition strengthens transparency within AI-driven advertising ecosystems. (January 2025)	

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## 7 First-Party Data & Identity Infrastructure

AI marketing systems depend heavily on high-quality, permissioned consumer data. As a result, buyers are acquiring platforms that organize, govern, and activate first-party data for AI-driven marketing

Target	Description	Buyer / Investor
	<p><b>Fantix</b> uses AI data processing to structure complex consumer datasets into segments optimized for advertising targeting. <b>Life360</b> acquired the company to activate its first-party location data through machine learning models. (February 2025)</p>	
	<p><b>InfoSum</b> provides AI-ready data collaboration technology that allows brands to combine first-party datasets securely through privacy-safe clean rooms. <b>WPP</b> acquired the platform to support AI-driven marketing models. (April 2025)</p>	
	<p><b>Publicis</b> acquired identity platform <b>Lotame</b> to strengthen the AI data infrastructure of its Epsilon unit. Lotame contributes more than 1.6 billion global IDs sourced from over 100 datasets across 109 countries. (March 2025)</p>	 PUBLICIS GROUPE
	<p><b>Sincera</b>'s AI-powered data verification tools help advertisers evaluate the quality of audience signals used in automated ad buying systems. The acquisition improves the reliability of AI-driven programmatic campaigns. (January 2025)</p>	

# Representative Transactions\*

 has been sold to 	 has been sold to 	 has been sold to  a portfolio company of 	 has been sold to 	 has been sold to 
a portfolio company of  has been sold to 	 has received an investment from 	 has received an investment from 	 has received an investment from 	 has been sold to 
 has been sold to 	 has been sold to 	 Financial Advisor on investment from 	 has received a debt financing from 	 a portfolio company of  has been sold to 
 has been sold to 	 has been sold to 	 Has been sold to  a subsidiary of 	 has been sold to 	 has received an investment from 
 has invested in 	 has received an investment from 	 Financial Advisor on sale to 	 Financial Advisor on Significant Investment From 	 has sold a majority to 

\* Includes transactions completed while at predecessor firms

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