2026 H1

Advertising Outlook

Key insights on consumer, advertising, and media trends, with data gathered from leading marketing industry professionals.
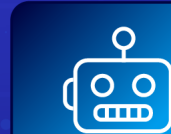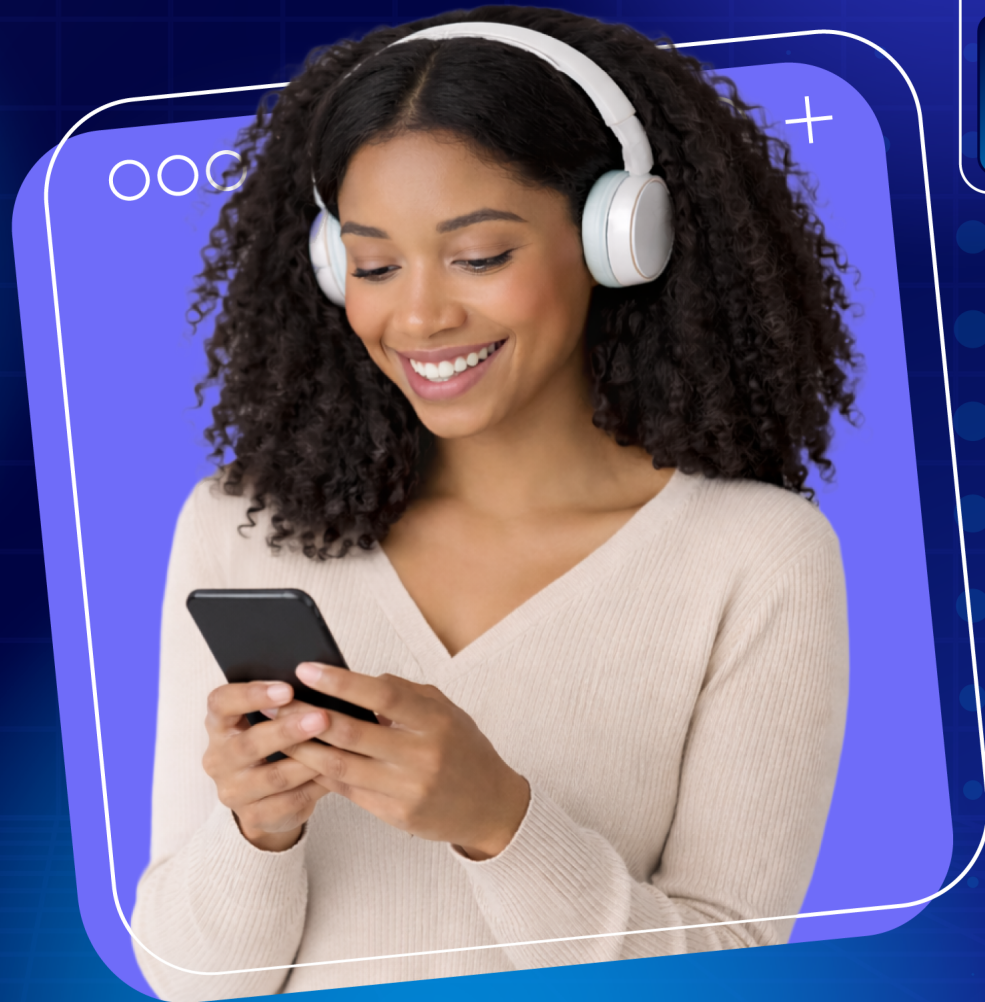
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Introduction

Thank you for reading Mediaocean's 2026 Advertising Outlook Report. These insights reflect input from 320 marketing professionals, focused on key consumer and technology trends along with 2026 H1 projected media investments.

We primarily surveyed marketers and agencies, but also included perspectives from media companies, measurement firms, tech platforms, and other industry cohorts. This is the ninth in our series of twice-a-year market reports, reflecting more than 6,100 total respondents, with the first published at the end of 2021. The most recent data points used in this research are based on surveys conducted in November 2025.

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Foreword

The tension between maturity and disruption will define advertising decision-making in 2026. Mediaocean's 2026 Advertising Outlook shows that there is clear maturity in marketers' approach to advertising spending and the types of media investments that are most important to them in H1. But it also finds that there is significant disruption, as emerging forces like AI enter the media mix.

The biggest example of maturity is that advertisers' confidence in digital channels remains incredibly strong, as evidenced by the high percentage of survey respondents who are planning to increase media investment in CTV/ streaming, digital display, and social platforms.

Another sign of maturity is advertisers' confidence in decision-making discipline. Industry executives recognize that both top-funnel brand advertising and bottom-funnel performance marketing are a necessity, as are the metrics to understand what's working. This balanced mindset shows that advertisers are taking a level-headed approach, one that comes from many years of analyzing the performance of their media investments.

Even as advertisers' investments and priorities have a familiar ring to them, their interest in AI is creating a significant amount of disruption. On one hand, marketers in the survey are eager to invest media dollars into ads on AI platforms and AI agents. But they are also still struggling to effectively implement generative AI within their marketing functions.

One of the most striking findings is the interest in AI media—in other words, the emerging business of advertising on platforms like ChatGPT, Google AI Overviews, and other AI destinations. More marketers are expecting to boost spending in this area than they are for search.

Debra Aho Williamson
Founder and Chief Analyst, Sonata Insights
Author, "The AI Ad Economy" on Substack

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Search is by no means being disintermediated by AI media, an ad category that is starting from essentially zero. Still, marketers' interest in this new form of advertising is a compelling trend to watch, and one that I am spending a lot of my own research time on this year.

Even as advertisers plan to increase spend on channels that are very mature, they are also willing to lean into new forms of media that could become incredibly powerful over time because of their ability to compress discovery, content, and commerce into one consumer conversation. This will create downstream implications (and opportunities) for how marketers manage things like media planning, attribution, and sequencing.

Exactly how AI media will disrupt media budgets and advertising plans remains to be seen, since the ad formats are still nascent, and ChatGPT has yet to formally launch advertising. Inside marketing organizations, the struggle with AI is already apparent, and it's creating new forms of disruption.

While there are many ways marketers can use generative AI, the percentages who have actually done so are still quite low. Well under half said they were using AI for the top use case, data analysis, and only about one-third were using AI for creative development and campaign optimization. A mere 1 in 10 were deploying it for SEO.

What's standing in the way of greater adoption? The picture that emerges is familiar. Systemic blockers like brand safety, difficulty connecting AI insights across systems, and data quality/access issues top the list of barriers inhibiting broader adoption of generative AI.

Any advertiser who has been in the digital space for a few years will recognize the same list of worries from previous disruptive transitions, which tells you how difficult they are to solve. While it's easy to say that marketers should focus on addressing these challenges in 2026, the reality is they will continue into 2027, 2028, and even longer.

However, there's one thing that marketers can look to in order to mediate their challenges with AI internally, as well as pave the way toward planned increases in ad spending on AI media: improving the way they orchestrate their ad tech systems. The majority of respondents believe orchestration across ad tech systems is important, yet only 1 in 10 said they had a fully unified system.

Orchestration is more than a desired capability; it's a necessary response to complexity. Orchestration is also more than a technical solution; it's an organizational and operational mindset shift that will allow maturity and disruption to better coexist and help to create a better connective tissue among current and emerging media channels.

As 2026 begins, advertisers show clear signs of confidence in digital media ad spend, strong interest in AI as a media channel, and a recognition that the challenges of implementing AI internally won't be easy to overcome. The biggest strength that advertisers can take into a year of managing disruption is to remember that they have the clear-eyed maturity that comes from a long history of making digital media investments and building the ad tech systems to support those investments. Maturity is a competitive advantage in navigating AI change.

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1 Budget bounce-back: Planned spend shows growth

Marketers are heading into 2026 with renewed confidence, signaling broader investment across the board, with every channel showing increasing or maintaining spend vs. decreasing. Reflecting the annual planning cycle, investment is rising, but flowing toward channels that offer stronger measurability, flexibility, and accountability.

CTV and Digital Display/Video are tied at the top, with 63% of marketers planning to increase spend in each. Together, premium streaming and digital video form the backbone of 2026 media investment, supported by their ability to reach audiences at scale with clearer performance signals. Social Platforms follow closely at 61%, reinforcing the continued strength of video-driven ecosystems and creator-led content.

Two emerging categories—AI Media (54%) and Influencer/ Creator Marketing (53%)—show some of the fastest acceleration. Both now surpass Search in expected increases, signaling a behavioral shift as consumers engage more deeply with conversational interfaces, creator content, and algorithmic discovery.

Search remains resilient with 47% increasing investment, though its momentum trails newer digital formats. Retail Media holds steady; while only 40% plan to increase spend, the majority intend to maintain existing levels, reflecting its durability in bottom-funnel performance and commerce-driven campaigns.

Traditional media continues to lose ground. Local TV, National TV, and Print face the sharpest cuts (36%, 34%, and 49% decreasing, respectively) as budgets shift toward channels offering greater precision, flexibility, and dynamic optimization. Radio/Audio and OOH/DOOH also show elevated decrease rates relative to digital-only categories.
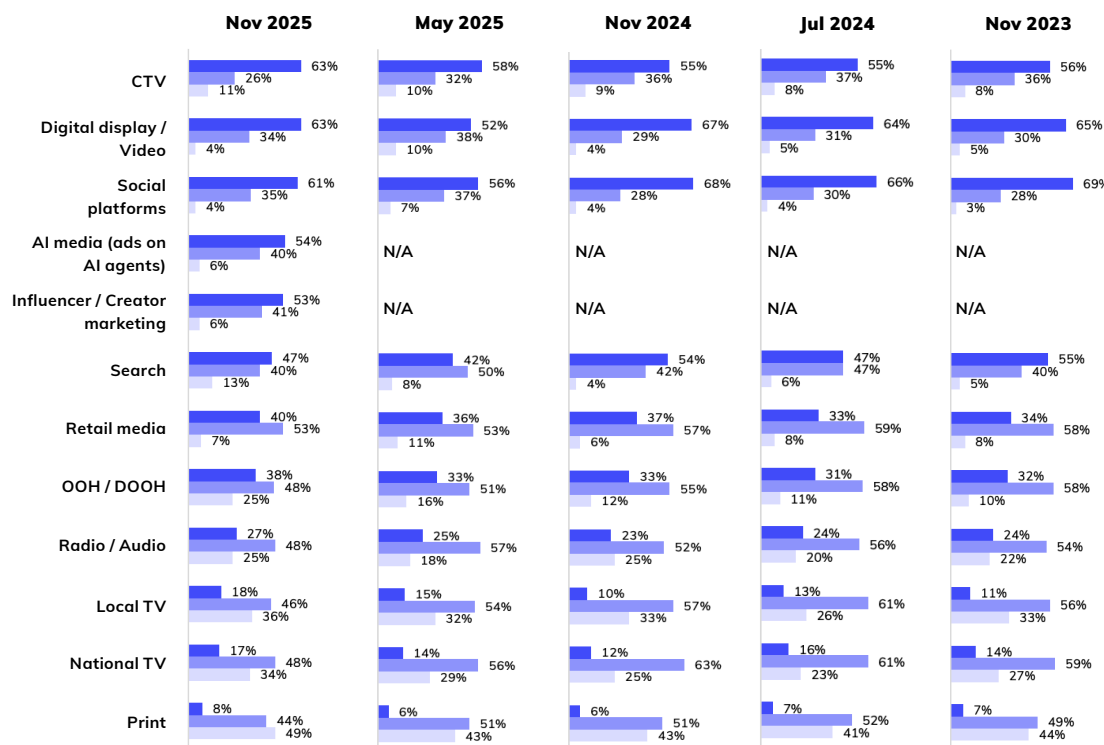
The broader story: 2026 is shaping up to be a growth year, but a selective one. Marketers are increasing investment, but they're concentrating those dollars in channels that provide measurable outcomes, richer creative formats, and tighter connection to consumer behavior.

Digital video, AI-driven environments, and creator-led media stand to benefit most, while traditional formats enter 2026 with continued budget pressure.

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For each media channel below, do you expect to increase, decrease, or maintain your spend?

● Increase ● Maintain ○ Decrease

	Nov 2025	May 2025	Nov 2024	Jul 2024	Nov 2023
CTV	63% / 26% / 11%	58% / 32% / 10%	55% / 36% / 9%	55% / 37% / 8%	56% / 36% / 8%
Digital display / Video	63% / 34% / 4%	52% / 38% / 10%	67% / 29% / 4%	64% / 31% / 5%	65% / 30% / 5%
Social platforms	61% / 35% / 4%	56% / 37% / 7%	68% / 28% / 4%	66% / 30% / 4%	69% / 28% / 3%
AI media (ads on AI agents)	54% / 40% / 6%	N/A	N/A	N/A	N/A
Influencer / Creator marketing	53% / 41% / 6%	N/A	N/A	N/A	N/A
Search	47% / 40% / 13%	42% / 50% / 8%	54% / 42% / 4%	47% / 47% / 6%	55% / 40% / 5%
Retail media	40% / 53% / 7%	36% / 53% / 11%	37% / 57% / 6%	33% / 59% / 8%	34% / 58% / 8%
OOH / DOOH	38% / 48% / 25%	33% / 51% / 16%	33% / 55% / 12%	31% / 58% / 11%	32% / 58% / 10%
Radio / Audio	27% / 48% / 25%	25% / 57% / 18%	23% / 52% / 25%	24% / 56% / 20%	24% / 54% / 22%
Local TV	18% / 46% / 36%	15% / 54% / 32%	10% / 57% / 33%	13% / 61% / 26%	11% / 56% / 33%
National TV	17% / 48% / 34%	14% / 56% / 29%	12% / 63% / 25%	16% / 61% / 23%	14% / 59% / 27%
Print	8% / 44% / 49%	6% / 51% / 43%	6% / 51% / 43%	7% / 52% / 41%	7% / 49% / 44%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: Five surveys of 3,788 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and November 2025

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2 Smarter, connected systems rise: Orchestration enters the chat

Marketers are increasingly prioritizing capabilities that offer sharper intelligence and stronger cross-channel cohesion. While established pillars such as Performance-Driven Paid Media (51%), Brand Advertising (48%), and Measurement & Attribution Capabilities (48%) remain essential, the shifts across several legacy categories signal a broader recalibration toward operational effectiveness—not a pullback. Teams are doubling down on the channels and tools that consistently deliver results, with budget flowing toward newer capabilities that have now earned their place at the core of the media strategy.

Two new entries, AI (39%) and Cross-Platform Orchestration (39%), debut with notable strength. Their rapid rise underscores a clear directional shift: marketers are moving beyond siloed point solutions and toward systems that connect insights, workflows, and activation. AI is increasingly viewed as the engine powering smarter decisions, while orchestration represents the connective tissue required to apply those decisions consistently across CTV, social, display, retail media, and other environments.

Two legacy areas show meaningful movement as well. Privacy (24%) saw a 33% increase since May 2025, reflecting mounting concern over signal loss, tightening regulation, and inconsistent data access across platforms. The operational fallout of identity deprecation is becoming more visible, and marketers are signaling a need for better compliance, transparency, and governance frameworks.

As AI adoption accelerates, Automation (30%) is becoming an essential companion capability, helping teams scale outputs, streamline workflows, and operate more efficiently with constrained resources.

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Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?

● November 2025 ● May 2025 ○ November 2024

Capability	November 2025	May 2025	November 2024
Performance-driven paid media	51%	60%	62%
Brand advertising	48%	51%	45%
Measurement & attribution capabilities	48%	50%	50%
AI	39%	N/A	
Cross-platform orchestration	39%	N/A	
Automation	30%	28%	28%
Demand generation	29%	33%	25%
Privacy	24%	18%	24%
Creative testing & analysis	21%	32%	27%
First-party data mastery	19%	36%	29%
Experimental / Innovation budgets	13%	22%	22%
Identity	12%	16%	11%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: Three surveys of 1,472 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2024 and November 2025
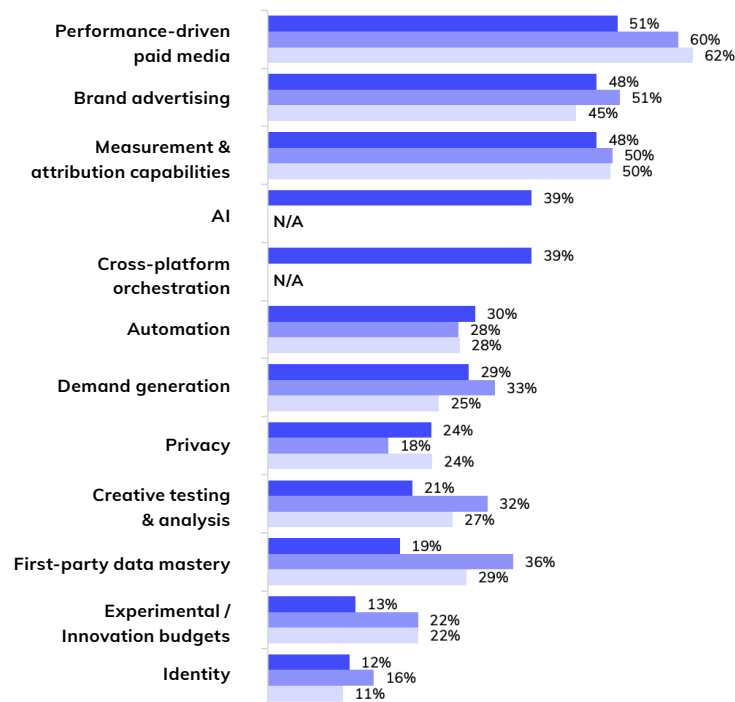
Meanwhile, First-Party Data Mastery (19%), once a rising priority, dropped significantly as marketers shift from long-term infrastructure building to near-term performance needs. Creative Testing & Analysis (21%) and Experimental/Innovation Budgets (13%) also saw meaningful pullbacks, suggesting that experimentation is giving way to pragmatism.

Taken together, the data points to a clear evolution in marketing maturity: 2026 will prioritize systems that are smarter, more connected, and more operationally efficient. The rise of AI and orchestration marks a turning point, signaling that marketers are no longer just optimizing channel by channel, but architecting the unified, intelligent systems required for durable advantage in an increasingly fragmented market.

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3 Threepeat: Gen AI remains the #1 consumer trend

For the third consecutive survey, Generative AI(Gen AI) remains the most important consumer trend, cited by 70% of marketers. Despite a slight dip from the last report, Gen AI continues to dominate, reflecting the technology's expanding role in everyday behavior, from search and discovery to content creation and problem-solving.

Just behind AI, video-driven environments are surging. Connected TV (CTV)/Streaming jumped sharply to 63%, up 24% from last May, fueled by ongoing shifts in viewing habits and the proliferation of premium, on-demand content options. TikTok/Social Video also saw a significant surge, rising to 43% and marking one of the steepest lifts across all categories. Together, these gains highlight a marketplace where short-form video, discovery algorithms, and streaming ecosystems increasingly shape culture and consumption.

This wave also marks the debut of Sustainability/ Carbon Impact of Media and Technology as a tracked trend, with 17% of marketers now monitoring the environmental footprint of digital advertising. Its emergence reflects growing expectations for transparency, responsibility, and environmentally conscious decision-making.

By contrast, E-Commerce Everywhere declined to 27% after years of heightened pandemic-era relevance. As shopping behavior stabilizes, marketers appear to be reallocating attention toward the emerging forces reshaping discovery, engagement, and conversion, namely AI and video-first platforms.

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What are the most important consumer trends you're watching for?

● November 2025   ● May 2025   ○ November 2024

Trend	November 2025	May 2025	November 2024
Generative AI	70%	72%	63%
Connected TV (CTV) / Streaming	63%	51%	56%
TikTok / Social video	43%	32%	51%
Consumer privacy	28%	26%	24%
E-commerce everywhere	27%	36%	35%
Political & advocacy trends	18%	20%	11%
Sustainability / Carbon impact	17%	N/A	
Gaming	13%	14%	18%
Metaverse	12%	9%	13%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: Three surveys of 1,472 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2024 and November 2025
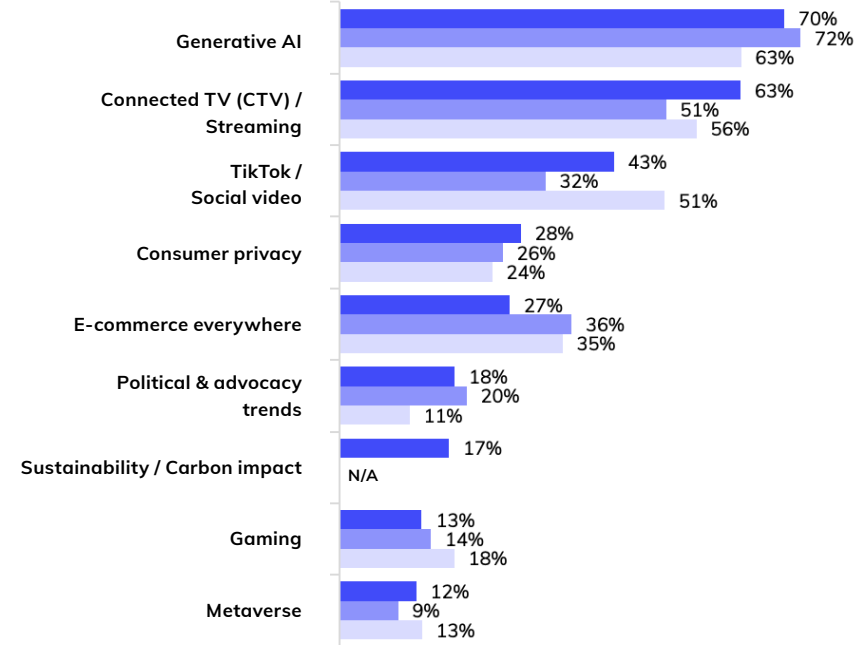
Marketers are also widening their field of view to include cultural and policy-driven trends: Consumer Privacy (28%), Political & Advocacy Trends (18%), Gaming (13%), and even the Metaverse (12%) remain meaningful considerations. While none rival AI or video ecosystems, they reflect a broader recognition that societal shifts, identity expectations, and digital environments all play an increasingly influential role.

The data points to a consumer landscape that's faster and more multidimensional than ever. While Gen AI remains the undisputed leader, 2026 will be shaped by an expanding constellation of trends. The rising influence of streaming, social video, and sustainability—combined with shifts in privacy, politics, and policy—are shaping a new foundation for the next phase of marketing strategy.

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4 AI's biggest roadblocks mirror its biggest opportunities: Data, integration, and safety

As Gen AI becomes more deeply embedded in marketing workflows, its role is continuing to shift from experimentation to operational necessity. This survey shows marketers gravitating toward AI in ways that directly support insight generation and campaign performance. Data Analysis (43%) and Market Research (43%) again top the list of use cases, reflecting AI's ability to simplify decision-making and process complex datasets—critical functions as teams confront fragmented signal data and rising content velocity.
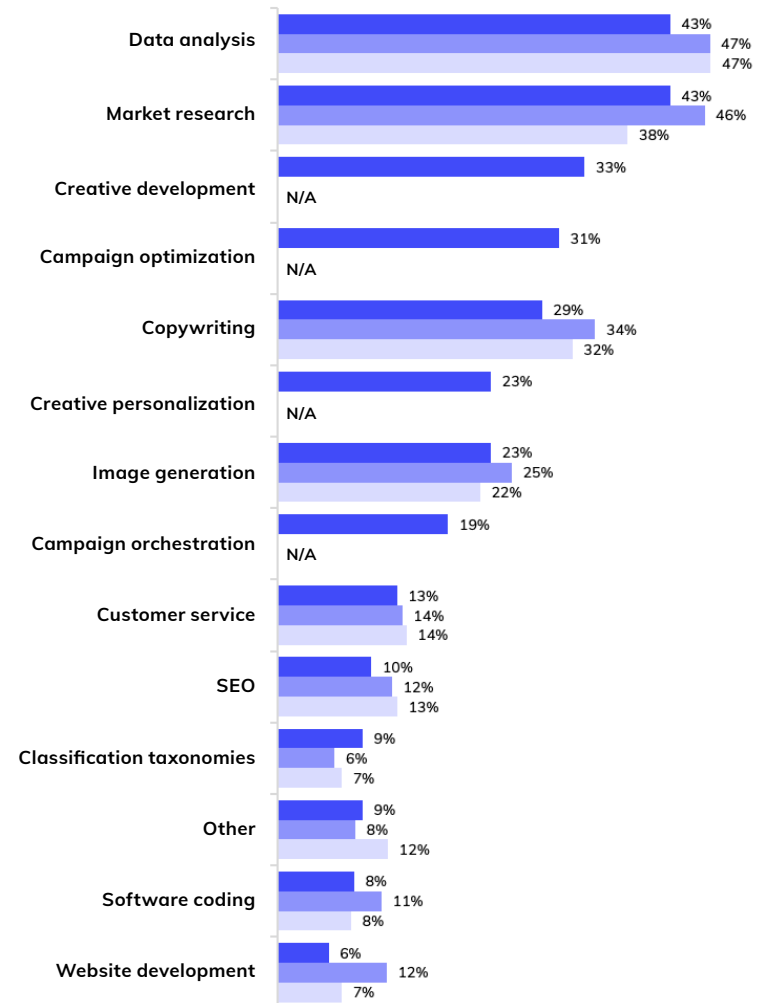
Beyond these foundational uses, adoption is expanding into creative and activation-focused areas. Creative Development (33%), Campaign Optimization (31%), Creative Personalization (23%), and Campaign Orchestration (19%) are gaining traction quickly. This shift signals that AI is no longer limited to back-end intelligence. It is increasingly shaping how concepts are built, iterated, and delivered across platforms. Meanwhile, more mature creative workflows such as Copywriting (29%) and Image Generation (23%) remain widely used but softened slightly as teams refine where AI provides the clearest lift.

Technical applications, however, are losing momentum. Website Development (6%) and Software Coding (8%) saw the steepest declines, suggesting that marketers are moving away from engineering-heavy uses of AI and gravitating toward functions that sit closer to creative acceleration, strategic decisioning, and campaign performance.

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How are you currently using Generative AI in your marketing?

● November 2025   ● May 2025   ○ November 2024

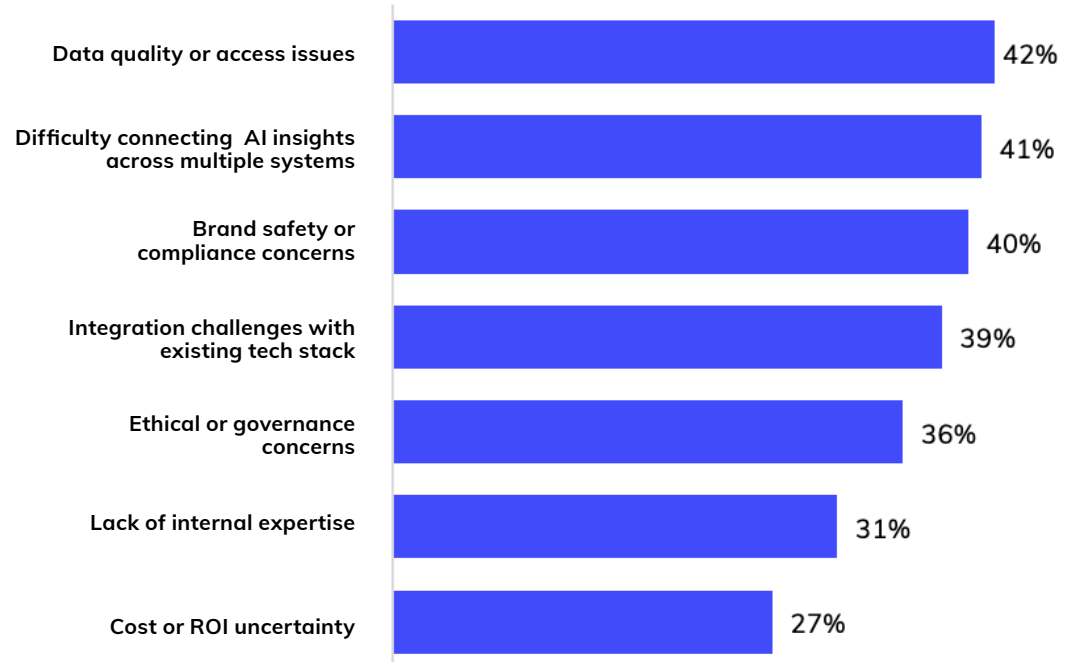| Category	November 2025	May 2025	November 2024
Data analysis	43%	47%	47%
Market research	43%	46%	38%
Creative development	33%	N/A	
Campaign optimization	31%	N/A	
Copywriting	29%	34%	32%
Creative personalization	23%	N/A	
Image generation	23%	25%	22%
Campaign orchestration	19%	N/A	
Customer service	13%	14%	14%
SEO	10%	12%	13%
Classification taxonomies	9%	6%	7%
Other	9%	8%	12%
Software coding	8%	11%	8%
Website development	6%	12%	7%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: Three surveys of 1,472 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2024 and November 2025

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Marketers' biggest constraints tell an equally compelling story. The top barriers—Data Quality or Access Issues (42%), Difficulty Connecting AI Insights Across Multiple Systems (41%), Brand Safety or Compliance Concerns (40%), and Integration Challenges with Existing Tech Stack (39%)—all map directly to the areas where AI has the greatest potential to create value. Progress requires cleaner data, stronger interoperability, safer guardrails, and more cohesive system design. Other constraints, including Ethical or Governance Concerns (36%), Lack of Internal Expertise (31%), and Cost or ROI Uncertainty (27%), point to the need for clearer frameworks and organizational alignment as AI scales.

The story is consistent: marketers are leaning into AI for insight generation, creative acceleration, and campaign optimization, but foundational system challenges are showing the next wave of impact. The very roadblocks slowing adoption are also the areas where AI stands to deliver the most transformative value. Solving these constraints isn't just about removing friction; it's the path to unlocking AI's full potential in marketing.

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What barriers are preventing broader AI adoption in your marketing workflows?

Barrier	Percentage
Data quality or access issues	42%
Difficulty connecting AI insights across multiple systems	41%
Brand safety or compliance concerns	40%
Integration challenges with existing tech stack	39%
Ethical or governance concerns	36%
Lack of internal expertise	31%
Cost or ROI uncertainty	27%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: One survey of 320 total marketing professionals conducted through SurveyMonkey in November 2025

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5 The orchestration gap: High expectations, low unification

Marketers are entering 2026 with a clear mandate: make channels work better together. Expectations for cross-channel orchestration continue to rise, yet the infrastructure required to support it remains deeply fragmented. The industry's top concern—Fragmentation Across Platforms and Publishers (56%)—reflects just how difficult it has become to manage audiences, performance, and creative across an ever-expanding omnichannel environment.
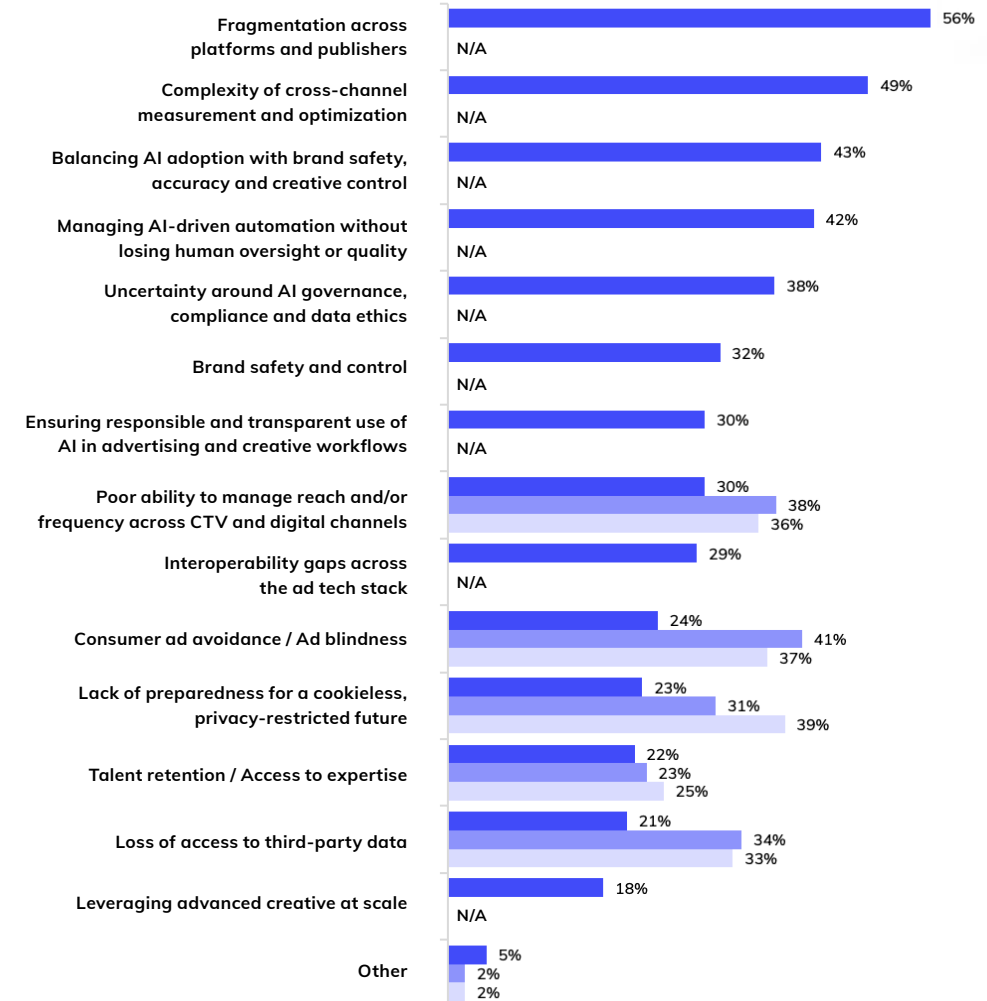
This fragmentation is compounded by the Complexity of Cross-Channel Measurement and Optimization, cited by 49% of marketers. As budgets shift toward CTV and AI-driven environments, the challenge is no longer buying across channels—it is understanding how those channels interact. Consistent metrics, unified frequency management, and clear optimization loops remain elusive. The decline in concerns about reach and frequency management—from 38% last year to 30% now—suggests not that the issue is solved, but that marketers are shifting attention to the structural causes of the problem, namely system silos and inconsistent signals.

AI is adding both innovation and operational tension to this equation. Three of the top five concerns—Balancing AI Adoption with Brand Safety, Accuracy, and Creative Control (43%), Managing AI-Driven Automation Without Losing Oversight (42%), and Uncertainty Around AI Governance and Compliance (38%)—highlight the pressure to deploy AI responsibly while maintaining quality, control, and consumer trust. These concerns sit directly at the intersection of data quality, platform control and interoperability, and organizational readiness, strengthening the case for clearer orchestration frameworks.

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What are your largest areas of concern in your media and marketing initiatives?

● November 2025   ● May 2025   ○ November 2024

Concern	November 2025	May 2025	November 2024
Fragmentation across platforms and publishers	56%	N/A	
Complexity of cross-channel measurement and optimization	49%	N/A	
Balancing AI adoption with brand safety, accuracy and creative control	43%	N/A	
Managing AI-driven automation without losing human oversight or quality	42%	N/A	
Uncertainty around AI governance, compliance and data ethics	38%	N/A	
Brand safety and control	32%	N/A	
Ensuring responsible and transparent use of AI in advertising and creative workflows	30%	N/A	
Poor ability to manage reach and/or frequency across CTV and digital channels	30%	38%	36%
Interoperability gaps across the ad tech stack	29%	N/A	
Consumer ad avoidance / Ad blindness	24%	41%	37%
Lack of preparedness for a cookieless, privacy-restricted future	23%	31%	39%
Talent retention / Access to expertise	22%	23%	25%
Loss of access to third-party data	21%	34%	33%
Leveraging advanced creative at scale	18%	N/A	
Other	5%	2%	2%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: Three surveys of 1,472 total marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and November 2025
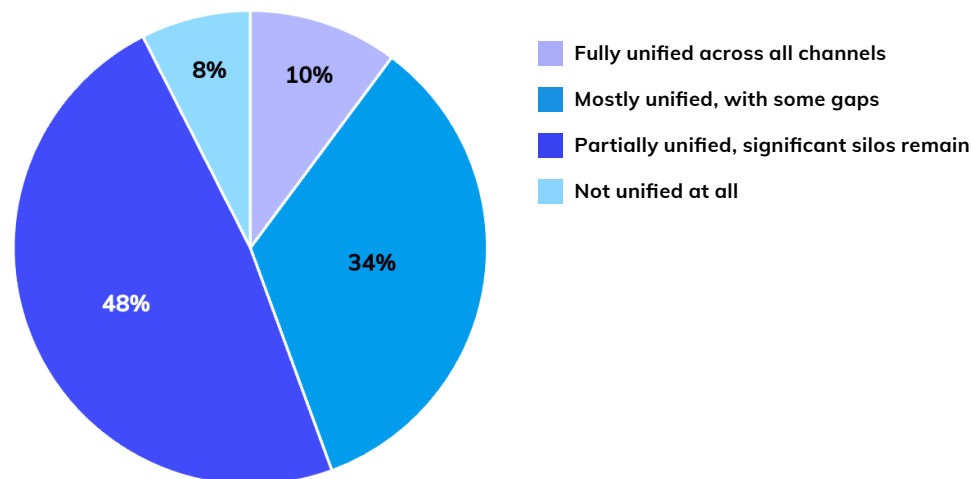
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Despite the urgency, most ad tech stacks are still far from unified. Only 10% of marketers say their systems are fully connected across channels; nearly half (48%) describe their environment as only partially unified, with significant silos that limit the movement of data and insights. These gaps contribute to several downstream challenges, from inconsistent measurement to creative redundancy and inefficiency in campaign pacing and optimization.

Yet even with these limitations, the industry's conviction is unmistakable: orchestration is no longer optional. A combined 86% of marketers say cross-channel orchestration is important, and more than half (53%) call it extremely important. The disconnect between aspiration and reality highlights a critical turning point. Marketers know where they need to go—toward systems that can share data, coordinate decisions, and unify workflows—but their current infrastructure has not caught up.
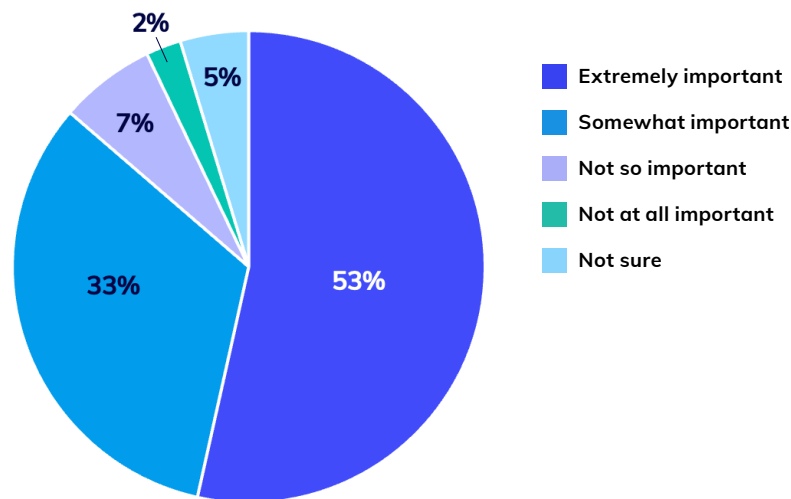
2026 will be a year defined by the push to close this gap. As AI-driven insights grow more precise and media channels become more interconnected, closing the orchestration gap will become one of the most critical determinants of marketing performance. High expectations are already here. Unification now has to follow.

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How unified are your ad tech systems across channels (CTV, social, display, retail media, etc.)?

- **Fully unified across all channels**
- **Mostly unified, with some gaps**
- **Partially unified, significant silos remain**
- **Not unified at all**

8% · 10% · 34% · 48%

How important is orchestration across your ad tech systems?

- **Extremely important**
- **Somewhat important**
- **Not so important**
- **Not at all important**
- **Not sure**

2% · 5% · 7% · 33% · 53%

Source: Mediaocean 2026 H1 Advertising Outlook Report
Methodology: One survey of 320 total marketing professionals conducted through SurveyMonkey in November 2025

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Conclusion

As marketers look ahead, the industry is entering a period defined by selective growth, operational focus, and accelerating transformation. Budgets are expanding across nearly every channel, but investment is flowing toward the environments that offer the clearest path to measurable outcomes. Traditional formats remain part of the mix, yet their role continues to contract as marketers prioritize flexibility, precision, and performance.

At the capability level, the shift is equally pronounced. Marketers are optimizing for what works: smarter, more connected systems, and workflows built to operate at the speed of modern marketing. The rise of AI and cross-platform orchestration signals a step-change from channel-level optimization to true, end-to-end intelligence, where insights, creative decisions, and activation move in lockstep. The softening of legacy categories is not a retreat, but evidence of a more focused, more efficient operating model.

Gen AI remains the dominant consumer trend for the third straight wave, reshaping how people search, consume, create, and communicate. Its influence is now intertwined with the rise of streaming, the cultural pull of social video, and growing expectations around sustainability and transparency. These forces point to a consumer environment that is more multidimensional, faster moving, and shaped by both technology and values.

AI adoption is expanding, but foundational challenges persist. Data quality, system integration, and brand safety concerns stand out as the defining constraints—and the defining opportunities. Marketers are using AI to accelerate insights and creative decisioning, yet the ability to scale these gains hinges on the integrity of the systems beneath them. Progress in interoperability and governance will determine how far and how fast AI can reshape the craft of marketing.

Finally, the orchestration gap has emerged as one of the industry's most urgent priorities. Expectations for unified creation, delivery, measurement, and optimization continue to rise, but only a fraction of marketers report having fully connected systems. As AI grows more powerful and media channels multiply, this disconnect becomes increasingly costly.

Closing this gap will require better data flows, clearer system design, stronger controls, and shared operational standards that bring intelligence and ctivation into alignment.

Across all insights, one theme stands out: 2026 will reward marketers who lean in to smarter, more connected, and more adaptive systems. The future isn't just about adopting new tools; it's about orchestrating them into something smarter, faster, and truly future-ready.

Methodology

This survey was conducted via SurveyMonkey in November 2025 and contains data from 320 respondents representing brands, agencies, media companies, measurement firms, tech platforms, and other marketing industry constituents.

Since 2021, we've had over 6,100 survey respondents for our year-over-year comparisons.

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Mediaocean provides end-to-end-software and AI for advertising, making content more accessible around the world. Our vision is a perpetually thriving media industry where marketing drives sustainable growth for the global economy. With over $200 billion in annualized ad spend running through its platforms, the company supports 100,000 users across the globe. Mediaocean owns and operates Prisma, the industry's trusted system of record for media management and finance; Innovid, the leading independent ad tech platform for creative, delivery, measurement, and optimization; and Protected by Mediaocean, an integrated solution for ad verification and brand safety. Visit www.mediaocean.com for more information.