THE STATE OF

PPC

GLOBAL REPORT 2026

PPCsurvey.com

1. Introduction

Welcome to the fourth edition of the Global State of PPC report from PPCsurvey.com.

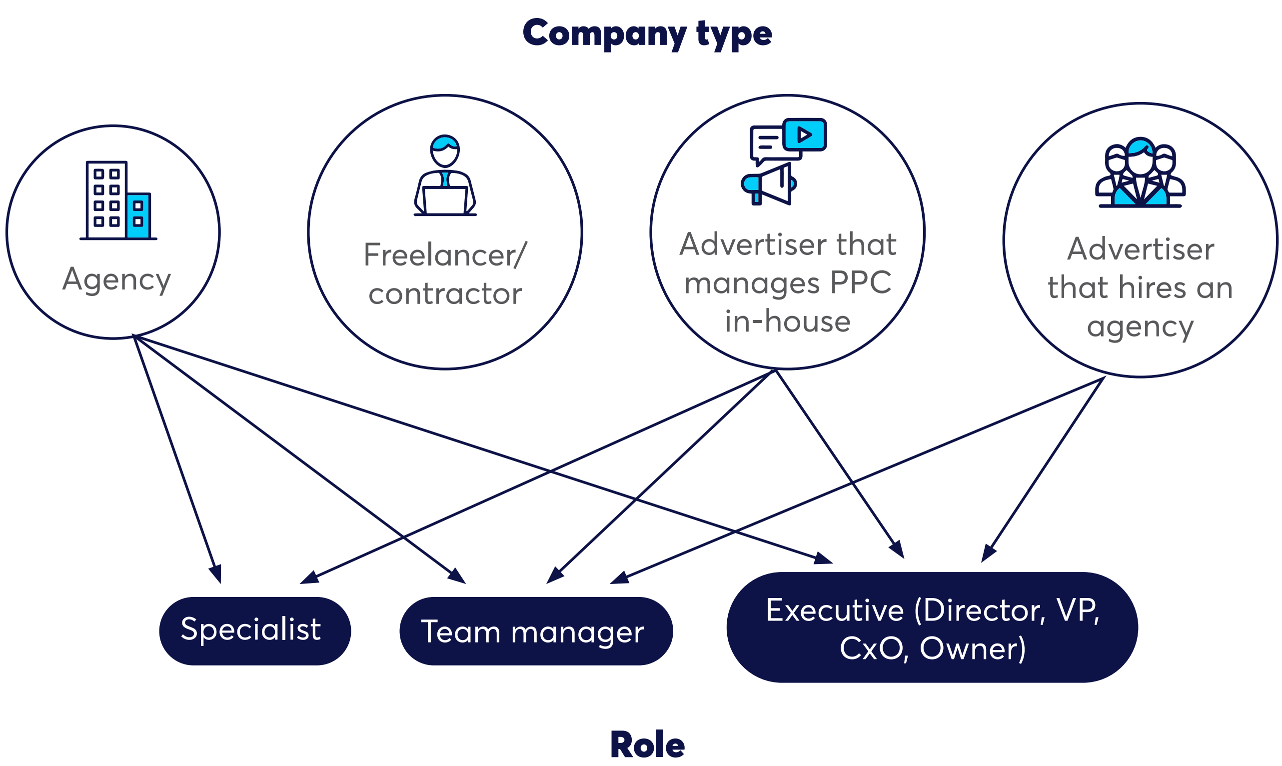
Back in 2022, we launched this initiative with 540 respondents and five partners. This year, 1,306 PPC professionals completed the survey, making it the largest of its kind. Also, the partner group increased to 9 partners to create and promote this report.

First, we want to thank everyone who filled out the survey. The survey was long. We know. Thank you for sticking with it, especially those of you who filled it out as individual contributors or freelancers. We hope this report repays the effort.

What's new for you in this edition:

- We converted previous open-ended questions to multiple-choice to reduce response time.
- We added more than ten questions about artificial intelligence in Chapter 8.
- Two new event partners joined our initiative: Hero Conf and SMX Munich/Berlin.
- We added "info tables" under each chart, highlighting key information and statistics.

As in previous editions, the survey was dynamic, so we asked relevant questions based on our respondents' company type and role.



2. Partners

This report is brought to you free of charge by the nine partners below. No forms, no lead capture, no strings attached.

Curious who they are? We've linked to each partner's website so you can explore what they do on your own terms.

DataFeedWatch by cart.com

DataFeedWatch is a leading feed management solution for digital agencies and e-commerce brands. Trusted by 18,497+ PPC teams worldwide, it optimizes and syncs 500M+ products daily across 2,000+ channels, from Google and Meta to GPT-based platforms - making data feed optimization simple and scalable.

GODTIERADS

The God Tier Ads Framework is the always updated Google Ads training, giving you instant clarity and done-for-you templates, so you don't devote your life to the machine.

Trusted by over 4,000 Google Ads professionals around the world and hailed as "the best investment for my PPC career".

HERO CONF

Hero Conf returns in 2026. The world's biggest PPC conference hits Brighton, UK in April and San Diego, US in September. Join top digital marketing minds for two days of expert insights, powerhouse speakers, and elite networking. Don't miss the ultimate PPC experience!

OPTMYZR

Optmyzr is a complete PPC management suite with everything agency and in-house teams need to run Search, Shopping, Performance Max, and Amazon campaigns their way.

Optmyzr customers use automation and customizable workflows to manage a collective $5 billion in yearly ad spend.

PRODUCTHERO By Channable

Producthero helps e-commerce advertisers get more conversions from their shopping ads. We're Europe's largest Premium Google CSS Partner and offer a platform that allows you to optimize your product titles, automatically segment products and monitor competitor prices so you can boost your campaigns.

smec

Smarter Ecommerce (smec) is a leading PPC software provider and performance marketing agency.

We empower ecommerce brands with AI-driven PPC automation that optimizes for profit and business outcomes while providing transparency and strategic control.

SMX Advanced Berlin is Europe's only event built exclusively for experienced search marketers.

Across two conference days and a hands-on Deep Dive Day, you'll learn directly from a highly curated group of the world's most respected experts in advanced SEO, PPC, GEO, data, and analytics.

Swydo is an automated reporting and monitoring platform that enables online marketers to monitor, analyze, and communicate meaningful insights.

Marketers can integrate data from 34+ marketing platforms and generate fully customized reports to share with customers and stakeholders.

TrueClicks aims to set and raise the PPC quality standard and as such, to be the independent source for grading and analyzing paid search accounts.

Offering user-friendly monitoring, auditing, insights and automation for Google Ads and Microsoft Advertising.

Free forever up to $50K/mo.

For questions, suggestions, and potential future partnerships, please email ppcsurvey@trueclicks.com

3. Survey methodology and demographics

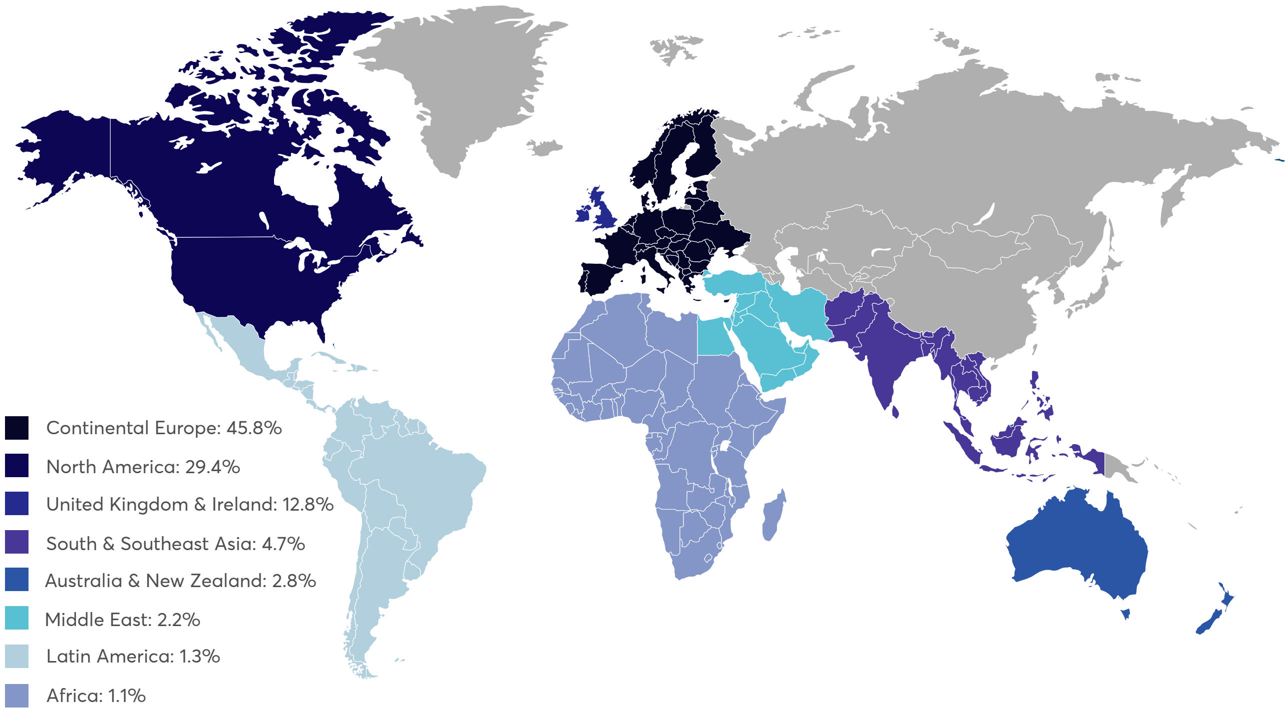
PPC professionals could fill out the survey on PPCsurvey.com between November 17 and December 24, 2025.

Respondents were invited to the survey by one of the partners, or learned about it through social media (mainly LinkedIn) or newsletters, especially from the Top 100 experts we nominated on our website.

Leaving an email address was optional. We offered various prizes and early access to this report as incentives. We also planted a tree for each survey entry through our partner Eden Reforestation Projects.

To be eligible for a prize and early access, respondents needed an email address, but we don't use it for anything other than sending them the report and a prize if they win.

3.1 Geographic breakdown



We asked respondents to select their country and grouped them by the regions below to allow comparisons later in this report.

Continental Europe: 598 respondents (45.8%). All countries on Europe's mainland, including the Nordics. All the way to (and including) Greece in the southeast and all the way to (but not including) Russia in the east.

North America: 384 respondents (29.4%). The United States (88%) and Canada (12%).

UK & Ireland: 167 respondents (12.8%).

South & Southeast Asia: 61 respondents (4.7%). This included the following countries in our survey: Bangladesh, India, Indonesia, Pakistan, the Philippines, Singapore, Sri Lanka, and Vietnam.

Australia & New Zealand: 36 respondents (2.8%).

Middle East: 25 respondents (2.2%). This included the following countries in our survey: Egypt, Israel, Saudi Arabia, Turkey, and the United Arab Emirates.

Latin America: 17 respondents (1.3%). All countries in the Americas that aren't the United States or Canada. This included the following countries in our survey: Brazil, Chile, Colombia, Ecuador, Jamaica, and Mexico.

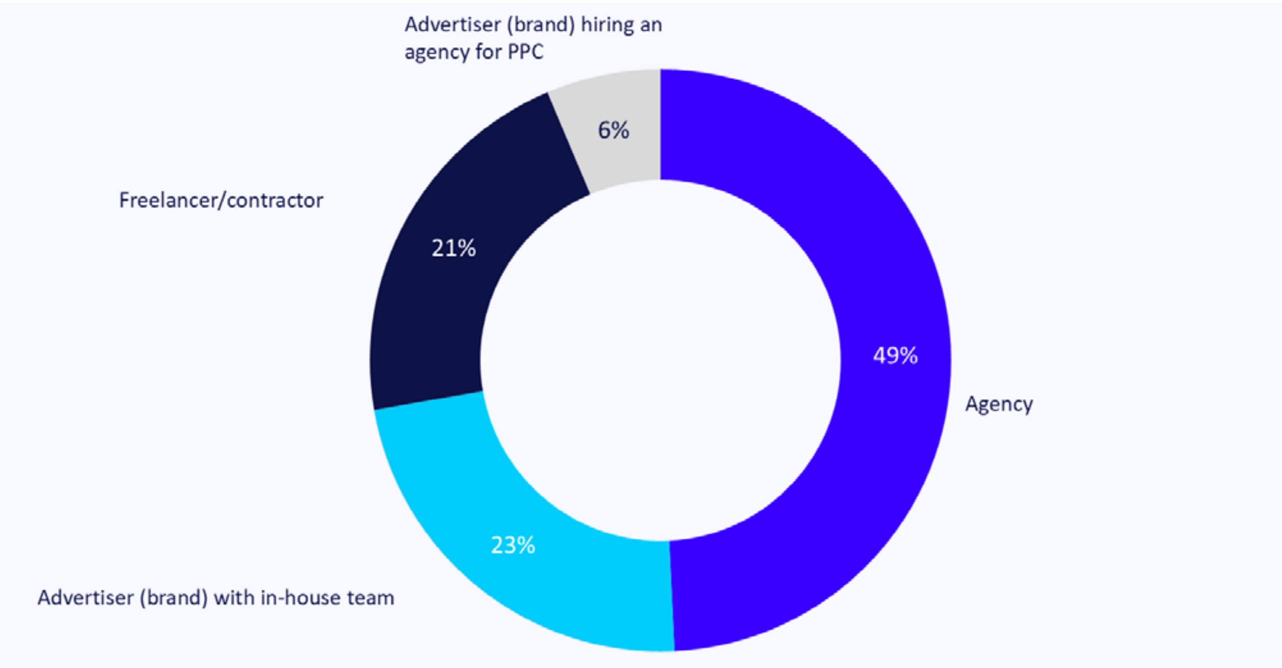
Africa: 13 respondents (1.1%). All countries in Africa except Egypt. This included the following countries: Morocco, Niger, Nigeria, South Africa, and Tanzania.

Three main factors explain the distribution above:

- Most partners are based in Europe.
- The survey was in English.
- Many questions were about Google Ads.

Outside of English-speaking countries, we saw that most respondents came from countries with an online advertising industry dominated by Google and a high level of English proficiency. This explains why we didn't see respondents from countries like China, Russia, and Japan.

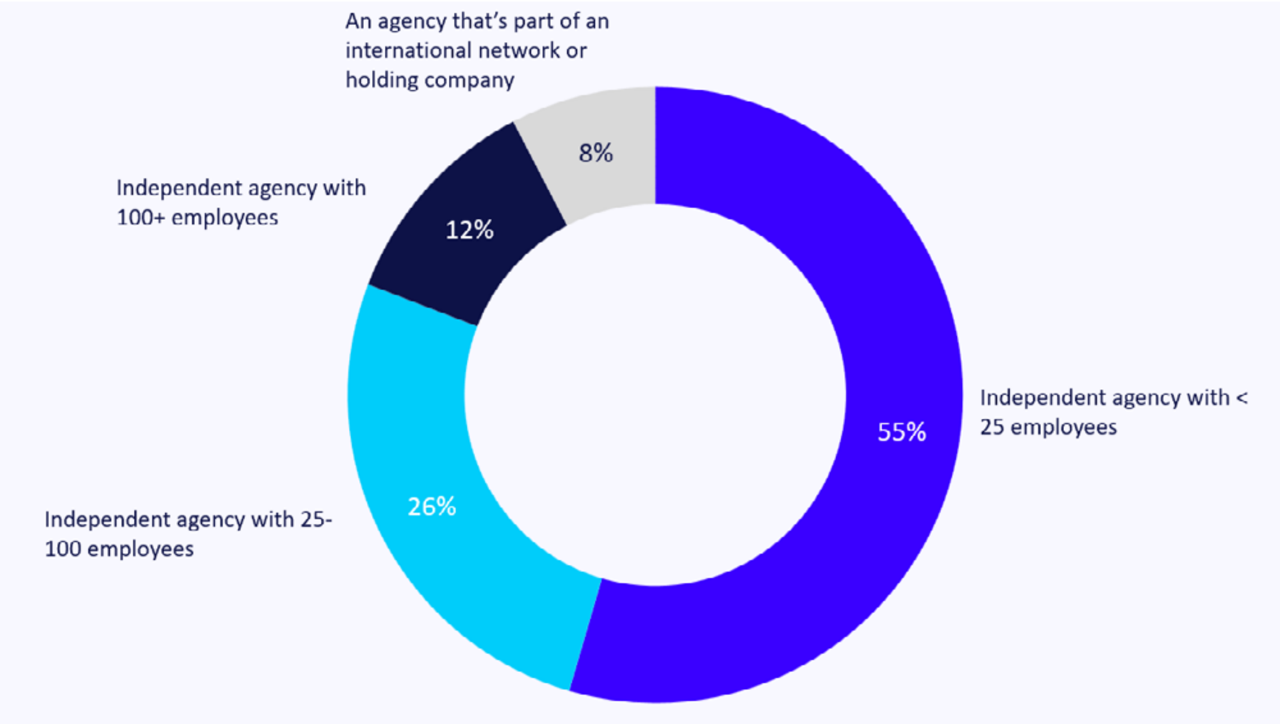
3.2 Company type



70% of our respondents manage PPC campaigns on behalf of their clients (agencies + freelancers), while 23% work in-house.

As in the previous editions, brands that hire agencies were hard to reach (just 6% of respondents). However, for the first time, we've included the questions we asked exclusively to this group in chapters 6.6 and 6.7.

3.2.1 Type of agency

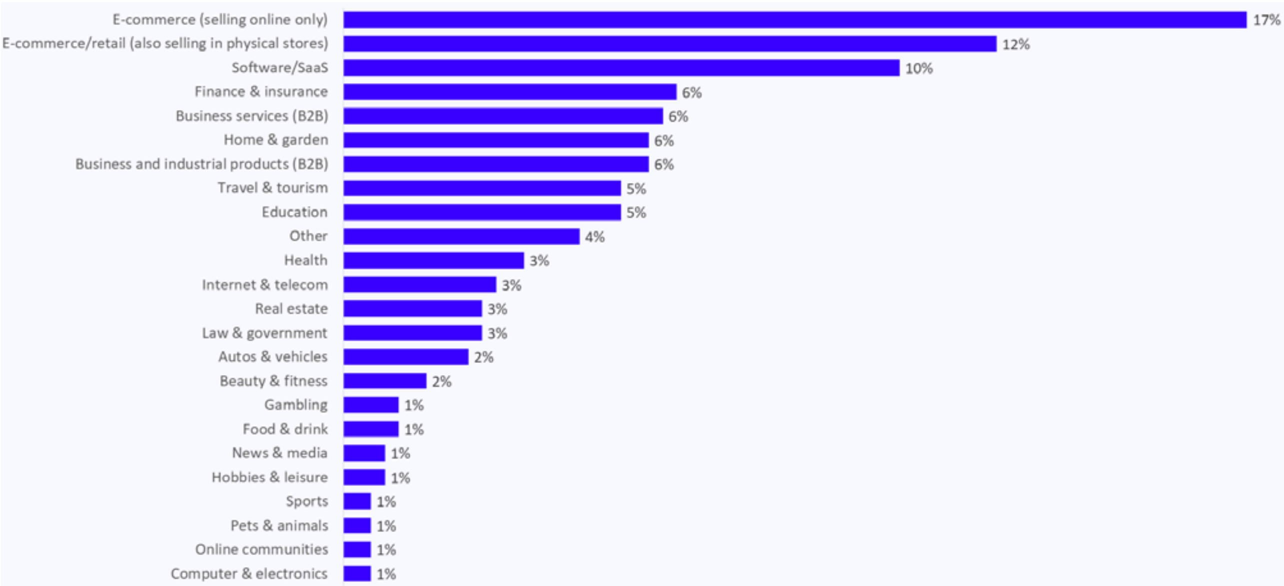


Question asked	What type of agency do you work for?
Who did we ask?	Agencies
# of respondents	642
Over-indexing segment(s)	Agencies managing more than $3M/mo: - 29% have more than 100 employees - 17% are part of an international network or holding company

This distribution looks very similar to the one we saw two years ago, with the majority of agency professionals working at boutique firms with fewer than 25 employees. Freelancers were excluded from this question.

Agencies managing more than $3M/mo are over twice as likely to have more than 100 employees or to be part of an international network or holding company.

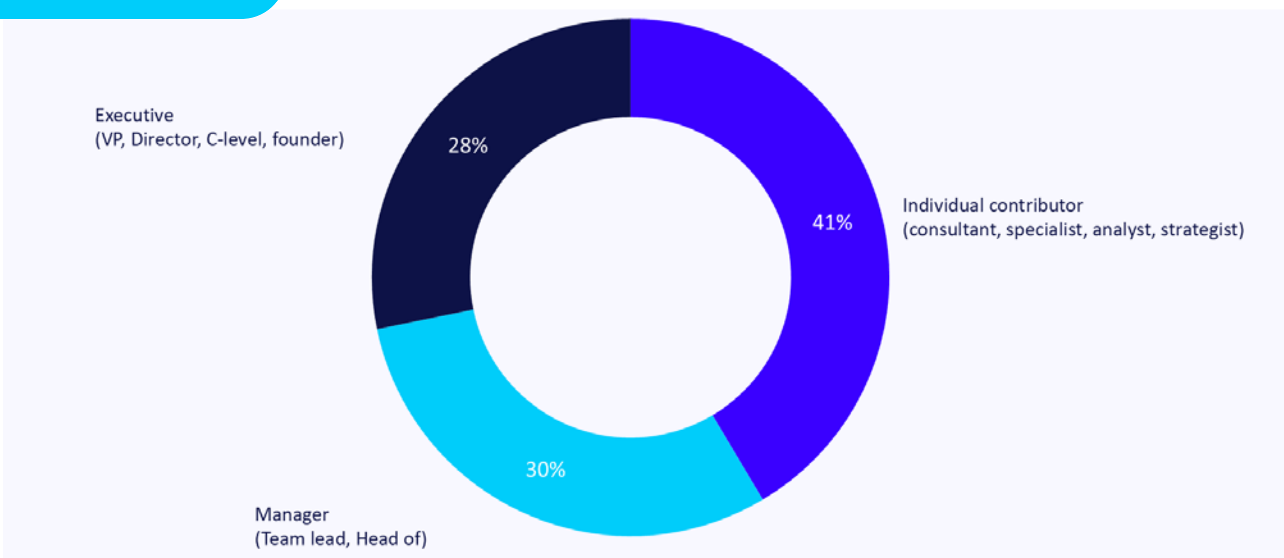
3.2.2 Advertiser industry



Question asked	What's your company's industry?
Who did we ask?	Advertisers
# of respondents	384

We split out e-commerce into pure players (selling online only) and retail players with physical stores. Together, they make up 29% of our advertiser respondents, down from 38% two years ago. So it looks like our survey is reaching a more diverse mix of industries.

3.3 Role

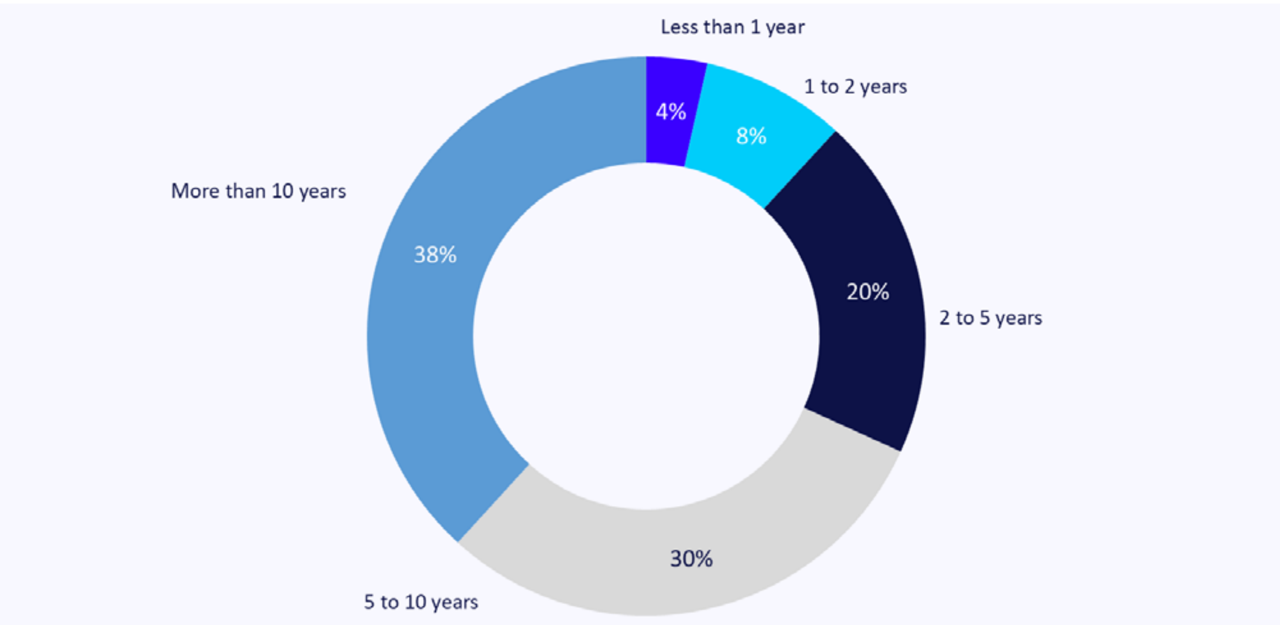


Question asked	What best describes your role in the company?
Who did we ask?	Agencies and in-house teams
# of respondents	943

Roles are evenly distributed across individual contributors, managers, and executives, and the split has barely moved since 2024.

The individual contributors and freelancers got the most questions in the survey, as their hands-on roles allowed them to answer questions about daily campaign management, AI, ad platform features, and tools.

3.4 Experience

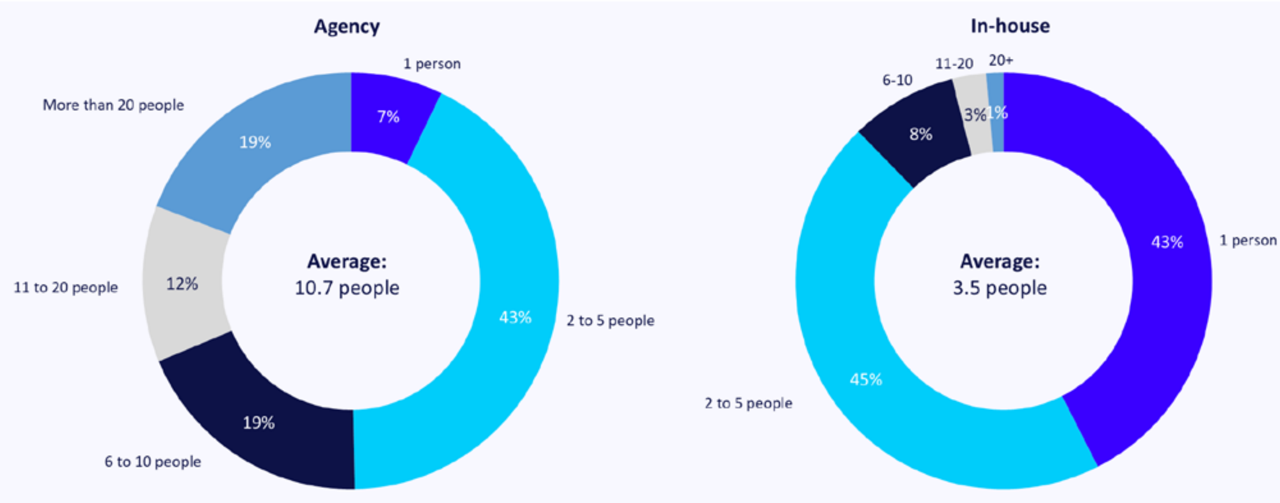


Question asked	How long have you worked in PPC/online advertising?
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	Managing more than $3M/mo - 65% had more than 10 years of experience
Under-indexing segment(s)	South & Southeast Asia: - 7% had more than 10 years of experience

As the graph shows, most respondents are (very) experienced PPC professionals. We found far fewer PPC veterans (10+ years of experience) in South & Southeast Asia (1/5th as many), while big spenders ($3M+/month) have nearly twice as many.

3.5 PPC Team sizes

Just as the role distribution, the distribution of team sizes is almost exactly the same as two years ago.

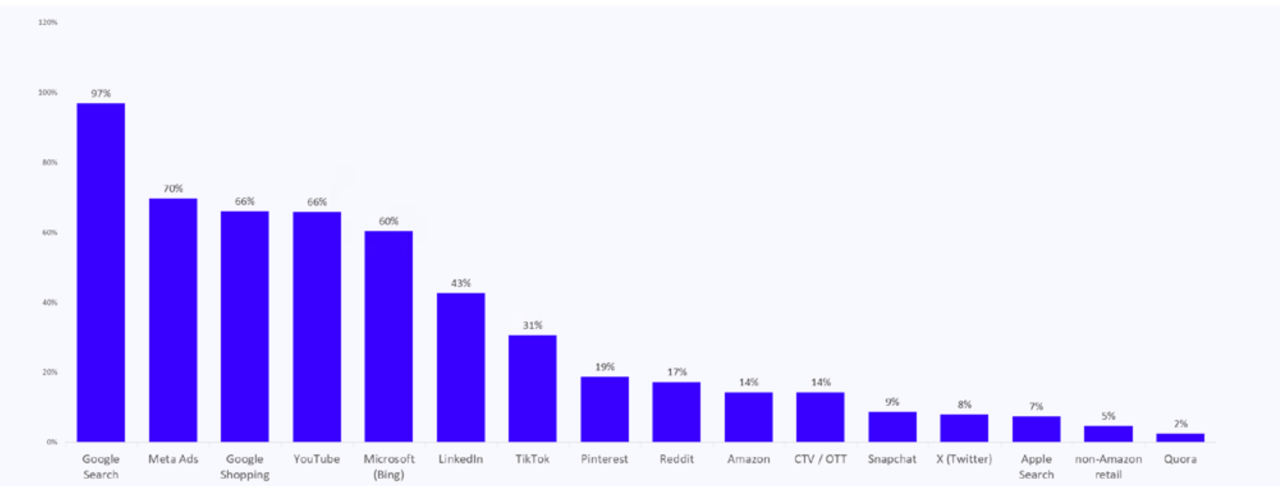


Question asked	How many people are dedicated to PPC at your company?
Who did we ask?	Agencies and in-house teams
# of respondents	943 (642 agencies and 301 in-house)

Most in-house teams are rather small, with just 12% of in-house PPC teams being more than five people. Even within agencies, the most common PPC team size is two to five people.
Still, larger team sizes are much more common at agencies: 50% of agency PPC teams have 6 or more people.

4. Ad platform adoption and spend

4.1 Ad platform adoption



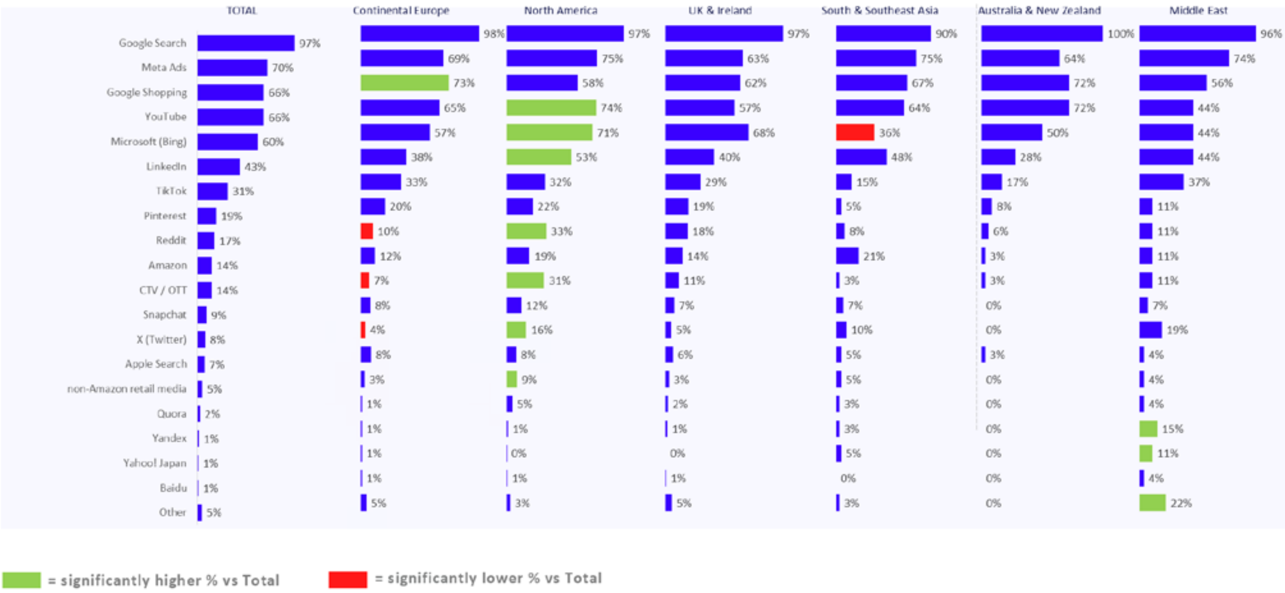
Question asked	On which platforms are you (or is your team) currently running PPC campaigns?
Who did we ask?	Everyone
# of respondents	1,306

The percentages above show how often a platform appears in the mix, not how much is spent on it. For global spend data, see the table at the end of this chapter.

Google (including Shopping and YouTube), Meta, and Microsoft (Bing) top this list. A new channel we didn't ask for two years ago is Connected TV/over-the-top (CTV/OTT), which saw a 14% adoption in this survey. CTV advertising is experiencing rapid growth, and we expect to see increased adoption in the following surveys.

The advertising mix becomes more interesting when segmented by geography and monthly spend under management, so we'll do that in the following two paragraphs.

4.1.1 Platform adoption by geography

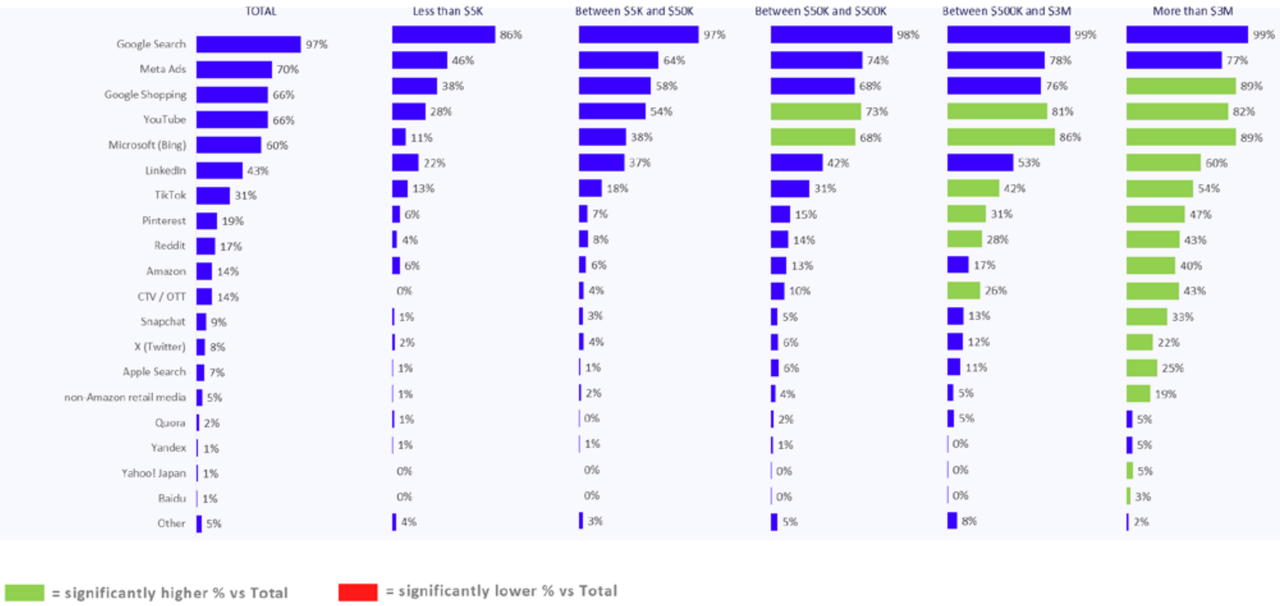


As you can see in the chart above, some platforms have significantly different adoption across different regions:

- **Microsoft (Bing)** is less popular in South & Southeast Asia, where it's used by just 36% of respondents vs. an average of 60%.
- **YouTube, Microsoft (Bing),** and **LinkedIn** are 12% to 23% more popular in North America than across all regions.
- Four platforms show a stark North America vs. continental Europe gap, with the US and Canada adopting them roughly 3x more: **Reddit, CTV/OTT, X**, and **non-Amazon retail media.**

We believe the reasons differ. Non-Amazon retail media skews American because the biggest players are: Walmart, Target, Best Buy, Instacart, Home Depot, Kroger. Reddit and connected TV look more like a maturity gap, and we'd expect Europe to close it in the coming years. X is harder to pin down, but we think the difference is cultural.

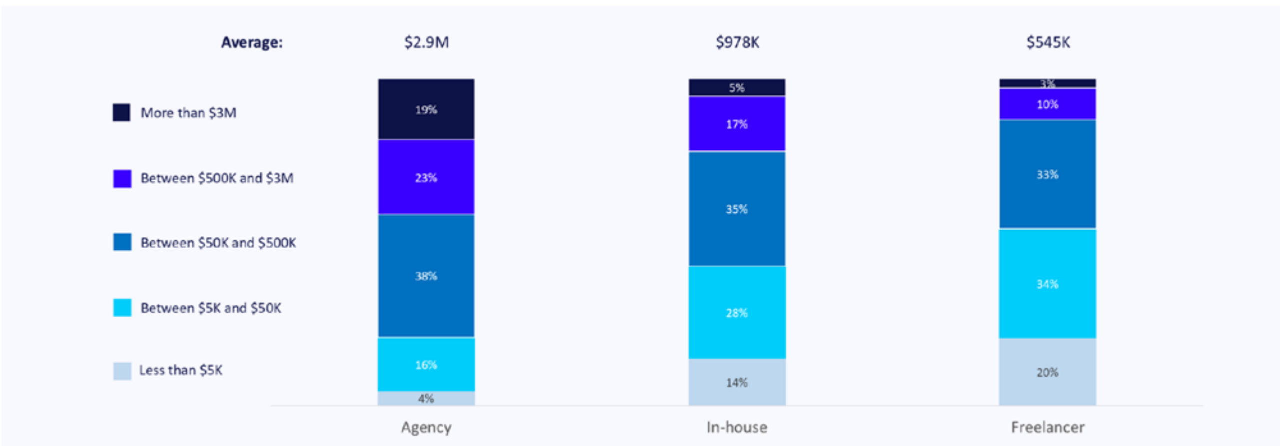
4.1.2 Platform adoption by monthly spend level



Once spend levels increase, we see the following platforms being adopted more:

- **YouTube** and **Microsoft (Bing)** are the first two platforms to see a significant increase in adoption at the $50K-$500K/mo tier.
- The following platforms see increased adoption when monthly spend ranges from $500K to $3M: **TikTok, Pinterest, Reddit,** and **CTV/OTT.**
- Finally, when monthly ad spend exceeds $3M, we also see an increased adoption of **Amazon, Snapchat, X, Apple,** and **non-Amazon retail media.**

4.2 Monthly spend by company type



Question asked	What's your average total monthly PPC ad spend (under management)?
Who did we ask?	Everyone
# of respondents	1,306 (we're not showing the advertisers who hire an agency in the results above)

We see agencies managing higher monthly spend levels ($2.9M/mo on average), followed by in-house teams ($978K/mo) and freelancers ($545K/mo). These numbers are nearly identical compared to two years ago.

4.3 Monthly spend per team member: agency vs. in-house

By asking for company type, team size, and monthly spend under management, we were able to combine these answers to determine the average PPC spend per person across agencies and in-house teams.

	Agencies		In-house teams	
Monthly spend level	**Avg. team size**	**Avg. monthly spend per team member**	**Avg. team size**	**Avg. monthly spend per team member**
< $5K			1.5	$1,667
$5K - $15K			2.5	$3,989
$15K - $50K	5.5	$5,865	2.9	$11,383
$50K - $100K	7.2	$10,436	3.0	$24,650
$100K - $250K	8.0	$21,954	3.3	$52,254
$250K - $500K	7.0	$53,497	4.1	$92,466
$500K - $1M	10.4	$72,414	4.1	$183,775
$1M - $3M	12.2	$163,441	6.0	$332,673
$3M - $5M	16.5	$242,568		
$5M - $10M	20.2	$371,578		
$10M - $20M	21.3	$704,961		
> $20M	25.8	$1,164,672		

We had to average both team size and spend level, so this table is less about the exact values in each cell and more about the patterns that quickly emerge.

- The relationship between monthly ad spend under management and team size isn't linear. 3 to 4 people can manage the full range from $15K to $1M/month in-house, and 7 to 8 agency people can manage anything from $50K to $500K/mo.
- Agencies get very scalable once their monthly spend under management exceeds $1M and even more so above $5M/mo.
- In-house teams need half the team size to manage the same ad spend vs. agencies. This makes sense, as in-house teams don't have to deal with many different clients with diverse goals and backgrounds, and with pitching, onboarding, etc.
- We're surprised to see PPC in-house employees for advertisers spending less than $15K/mo. Hiring an agency to manage that spend should be much cheaper than hiring (full-time) employees to do so. We have to assume their in-house team has more responsibilities than just managing PPC campaigns.
- Compared to two years ago, agency teams managing more than $1M/mo have become more efficient. On average, team sizes decreased by 20% for the same spend level in this segment.

Agency teams managing over $1M/month have become 20% more efficient compared to two years ago. Fewer people, same spend levels. That's a remarkable shift.

But here's the uncomfortable question this data raises: if your agency still charges by the hour, and your team needs 20% fewer hours to deliver the same result, what happens to your revenue? You've just given yourself a 20% pay cut for getting better at your job.

This is why the billable hour discussion in chapter 6 isn't academic. The efficiency gains from AI and tooling are real, they're measurable, and they're accelerating. Agencies that don't decouple pricing from time spent are going to find themselves in a squeeze: doing more, earning less, and wondering where the margin went.

Wijnand Meijer, co-founder & CEO at TrueClicks

4.4 Global yearly ad spends

In a historic milestone, global advertising expenditure surpassed $1 trillion in 2025, a doubling since 2016. Digital channels dominated this spending, capturing over 70% of the market[1].

To get a feel for how that digital ad spend is distributed, the table below shows advertising revenue for the main PPC ad platforms from 2020 to 2025, along with the compound annual growth rate (CAGR).

Platform	Yearly advertising revenue in billions (USD)						CAGR
	2020	2021	2022	2023	2024	2025	
Google - Search & other	$104	$149	$162	$175	$198	$225	17%
Google - YouTube	$20	$29	$29	$32	$36	$40	15%
Google - Network	$23	$32	$33	$31	$30	$30	5%
Meta	$84	$115	$114	$132	$161	$196	18%
Amazon	$20	$31	$38	$47	$56	$69	28%
TikTok (estimate)	$2	$4	$12	$14	$24	$32	74%
Microsoft search	$9	$9	$12	$12	$13	$14	9%
LinkedIn (estimate)	$3	$4	$5	$6	$7	$8	22%
Snapchat	$2.5	$4.1	$4.4	$4.4	$4.8	$5.3	16%
Pinterest	$1.7	$2.6	$2.8	$3.0	$3.6	$4.2	20%
X (Twitter) (estimates from 2022)	$3.2	$4.5	$4.0	$2.3	$1.7	$2.3	-6%
Reddit	$0.2	$0.5	$0.7	$0.8	$1.2	$2.1	60%
Totals	$273	$385	$417	$460	$536	$628	18%

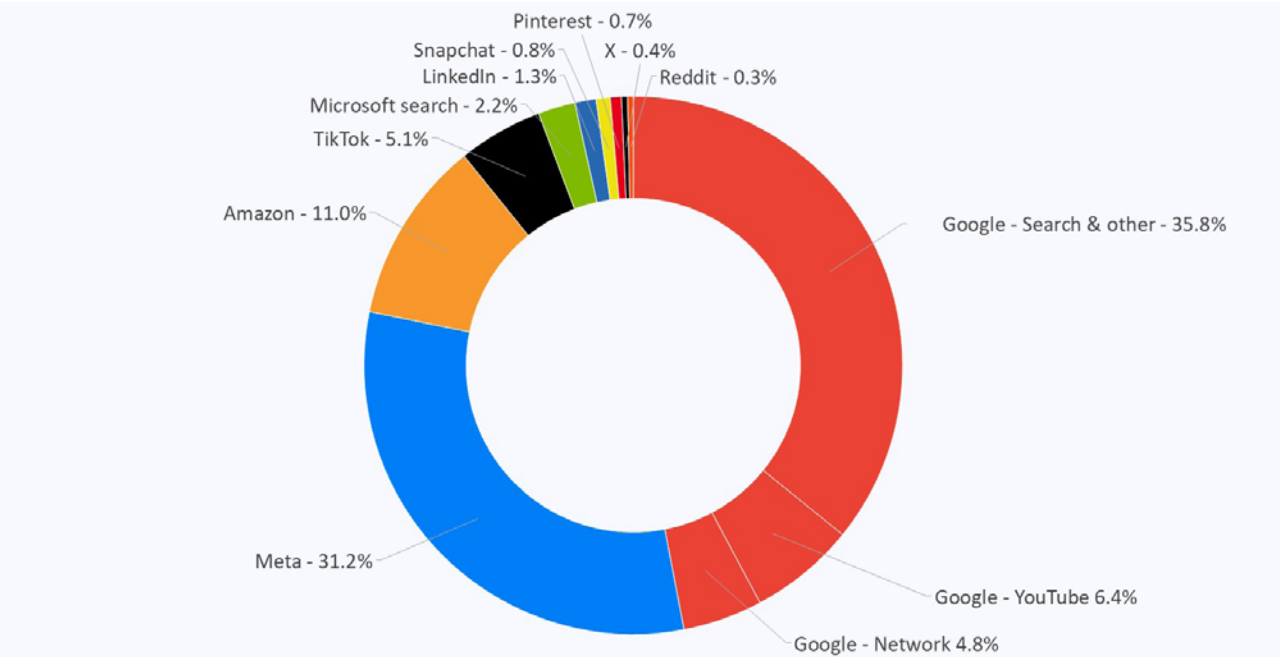
Microsoft has a fiscal year ending on June 30, so its data lags the other platforms by 6 months. TikTok doesn't publish its advertising revenue, and Microsoft doesn't break down LinkedIn revenue by service (total 2025 LinkedIn revenue was $18B). That's why we included estimates for TikTok and LinkedIn advertising below (and for X from 2022).

Based on the data above, Google holds 94% of the search advertising market ($225B), with Microsoft accounting for the remaining 6% ($14B).

[1] WPP Media - Mid-Year Global Advertising Forecast Update (June 2025)

We didn't find yearly data on global Apple (Search) Ads revenue, but eMarketer projected it to be $7.4B in 2025 for the US alone (a 15% YoY growth), making it a larger advertising platform than Snapchat, Pinterest, X, and Reddit.

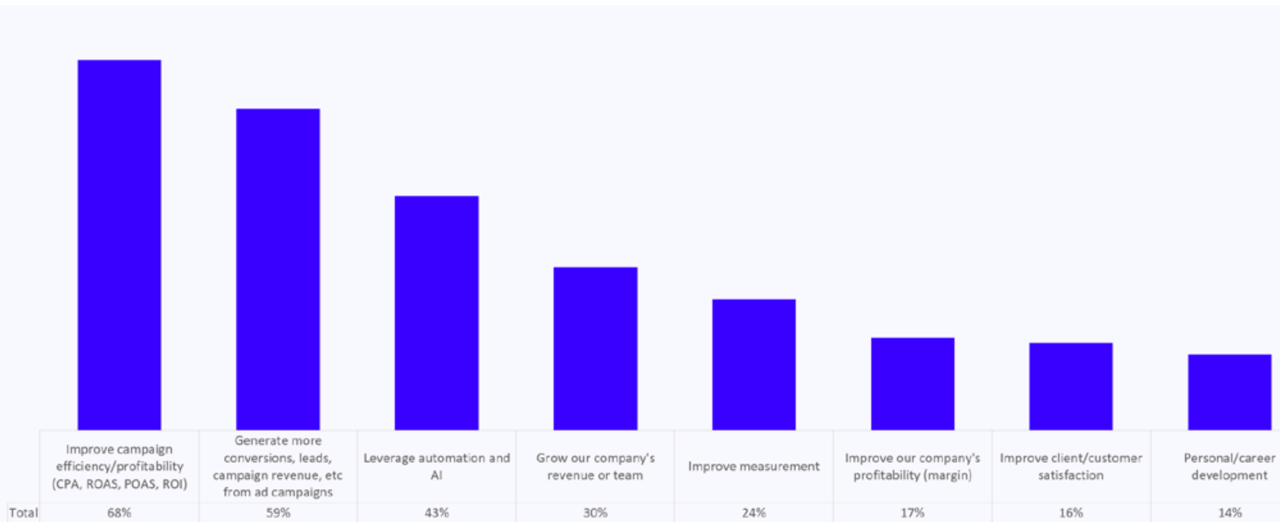
Elon Musk's acquisition of Twitter in October 2022 led to a massive decline in advertising revenue due to brand safety concerns, controversial policy changes, and reduced content moderation.



Global digital ad spend in 2025 remained heavily concentrated, 89% flows to just three platforms (Google, Meta and Amazon), while the other major players split the remaining 11%.

5. Goals and challenges

5.1 Priorities for 2026



Question asked	What are your main work priorities for 2026? Select 1 to 3 options.
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	70% of in-house teams answered "Generate more conversions, leads, campaign revenue"
Under-indexing segment(s)	37% of respondents managing more than $3M/mo answered "Generate more conversions, leads, campaign revenue" 33% of respondents from North America answered "Leverage automation and AI" 11% of respondents managing less than $5K/mo answered "Improve measurement"

The leading priority chosen was **improving campaign efficiency and profitability**, selected by **68% of respondents** overall.

Increasing conversions and revenue followed closely at **59%**, reinforcing that teams are focused on improving output from existing budgets rather than simply increasing spend.

Comparing these data points against the 2024 survey, we see an interesting switch in priorities. Two years ago, **AI and automation** was flagged as the number one priority for respondents. This year, it still ranks third overall at 43%. Why the change, if AI usage is more prevalent than ever? Could the slip in rankings be related to increased adoption rates over the last two years? As AI use in digital marketing has become more pervasive, perhaps it is no longer seen as a priority or challenge to tackle, but a solution that's used for any number of tasks. Is what was "scary" and new two years ago now almost universally accepted? We'll examine the use of AI in more detail later in this survey.

What also stands out is a difference in priorities between in-house teams and agencies, with 70% of in-house teams prioritizing generate more conversions, leads, campaign revenue compared to 52% of agencies and 59% of freelancers.

5.2 What does success look like?

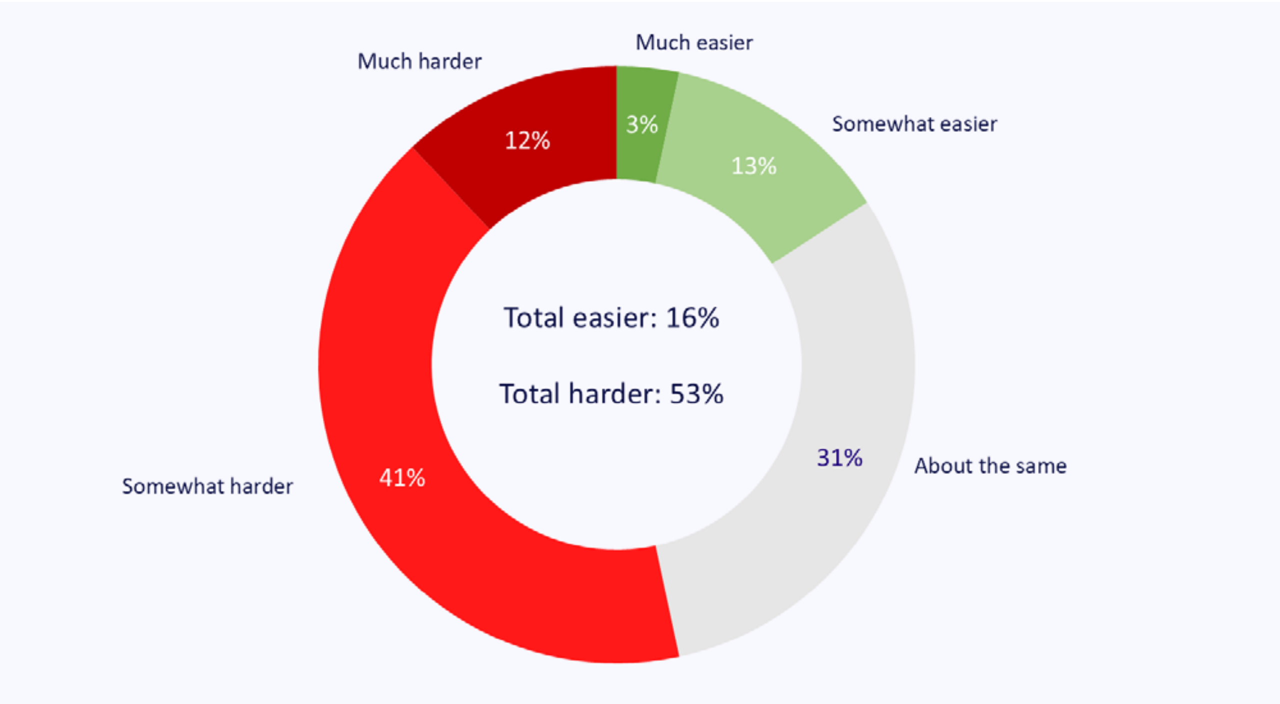
Question asked	What does success look like for you in your role? Select 1 or 2 options.
Who did we ask?	Everyone
# of respondents	1,306

For individual contributors, it's clear that they still view meeting or exceeding (client) campaign performance goals as the biggest factor to evaluate success in their role.

Meanwhile, executives tend to report that growing the company, in terms of revenue, team, and customers, is most important to them to evaluate success in their role.

While managers don't report team satisfaction as their highest ranking factor, it's clear that they do focus on it more compared to individual contributors and executives. While these results might not be surprising, it's still interesting to note that PPC specialists rate campaign performance goals over company results.

5.3 Is managing PPC campaigns harder or easier than two years ago?



Question asked	Is managing PPC campaigns harder or easier than 2 years ago?
Who did we ask?	Individual contributors and freelancers with at least 2 years of experience
# of respondents	624

Two years ago, 49% said PPC had become harder. Today it's 53%. "Easier" hasn't budged.

That tells me this isn't just transitional discomfort.

Control has reduced. Visibility has reduced. Complexity has shifted into tracking, creative and client influence.

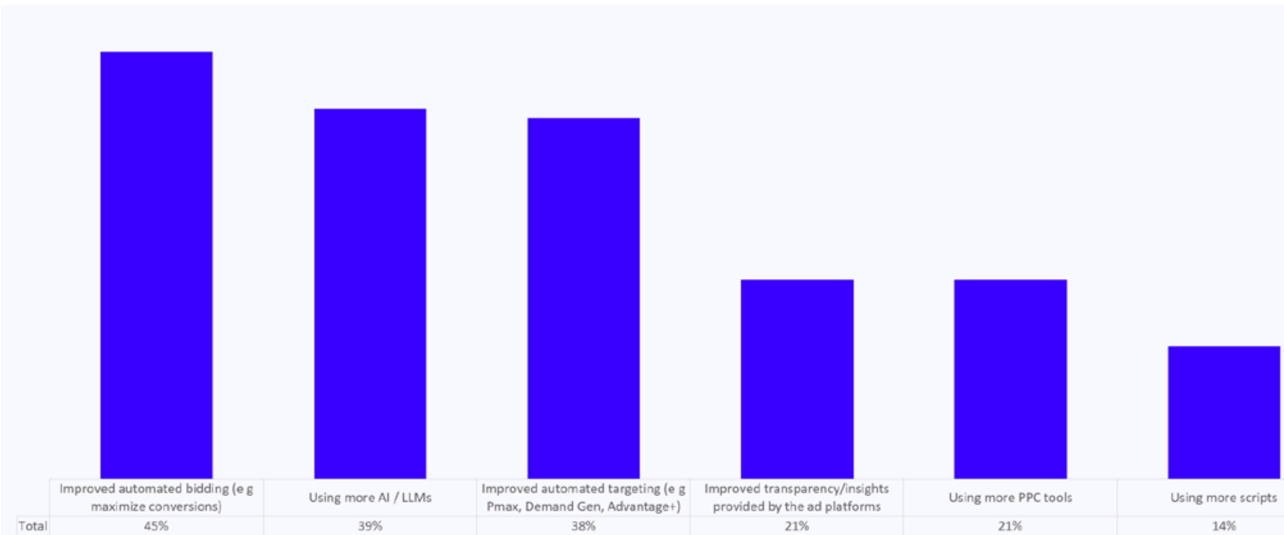
The platforms may have attempted to simplify the interface and automate features - but they haven't simplified the job.

Perhaps "harder" isn't about more buttons… it's about fewer. And the skills moving outside the ad platform, into areas that sit well beyond many people's comfort zone.

Don't let 'harder' be your hurdle; double-down on measurement and controlling the data. Learn landing pages. Understand positioning and business metrics. Get commercially literate. Because the future ads pro isn't merely a platform button pusher.

Ed Leake, Not the Messiah at God Tier Ads

5.3.1 Why 16% think it's easier now

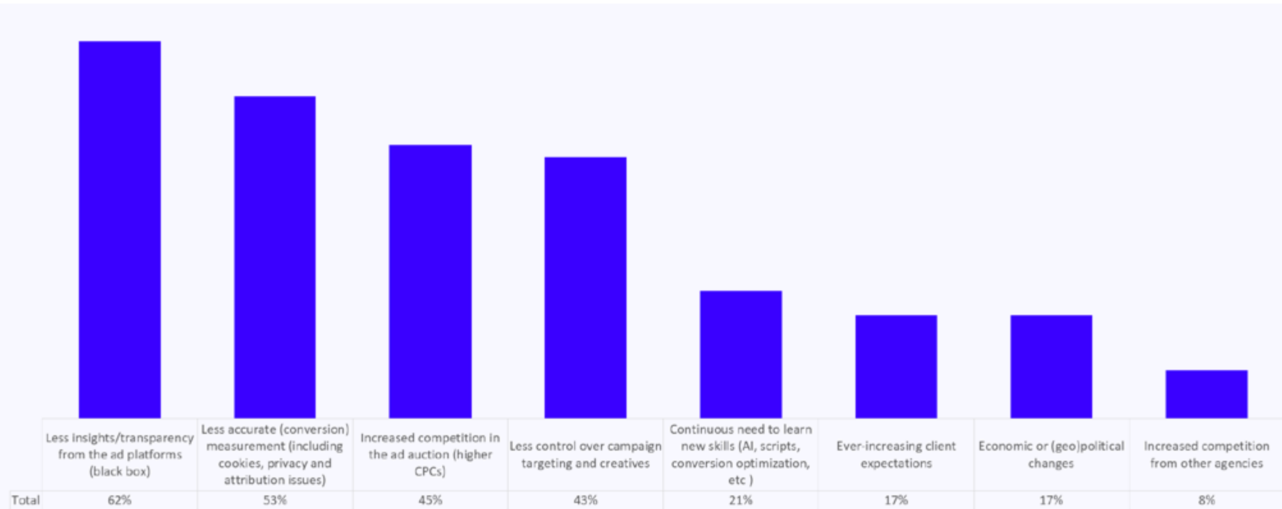


Question asked	What are the main reasons PPC has gotten easier in the past 2 years? Select 1 or 2 options.
Who did we ask?	Respondents who answered "easier."
# of respondents	99

Improvements to platform-side bidding and targeting are two common answers amongst those who feel campaign management is getting easier. The trouble is, fewer than 1 in 5 advertisers feel that way. This must be a discouraging result for advertising platforms, who have advanced ease-of-use as their primary thesis for automated campaign technology.

Another one-third of respondents who feel campaign management is easing cite AI tools including LLMs, while scripts and PPC tools also get mentioned. The common thread here is that these solutions are more under the control of advertisers and agencies. As platforms race to integrate AI features directly within the user interfaces, and even within fully automated workflows, it remains to be seen how PPC managers will react.

5.3.2 Why 53% think it's harder now



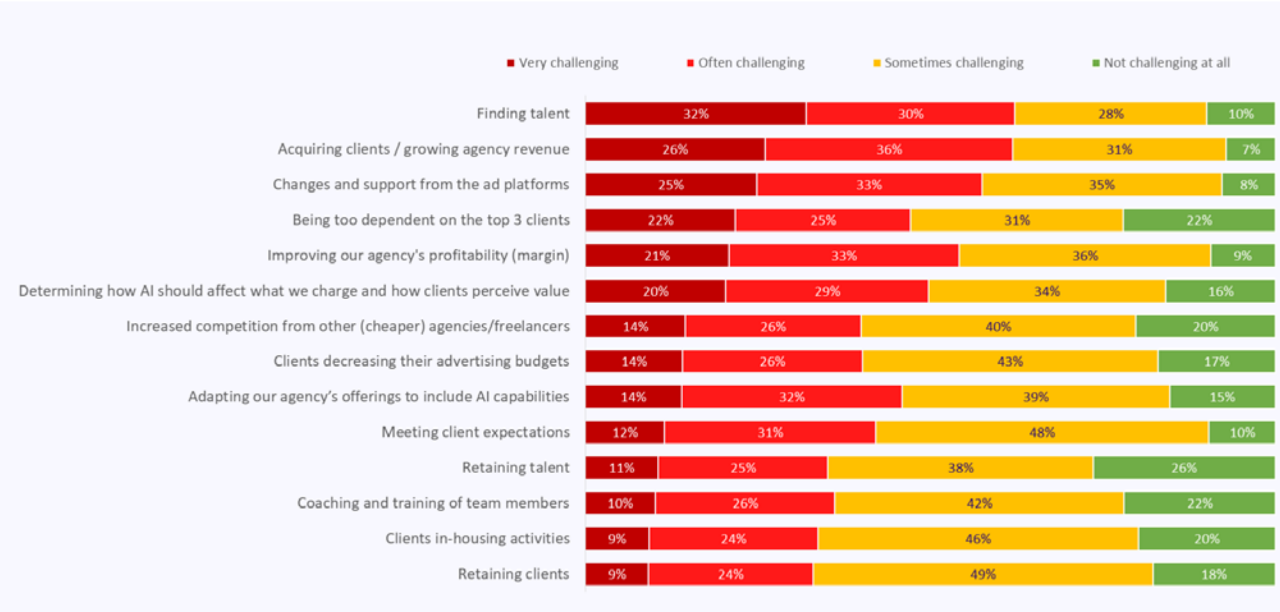
Question asked	What are the main reasons PPC has gotten harder in the past 2 years? Select 1 or 3 options.
Who did we ask?	Respondents who answered "harder"
# of respondents	333

When it comes to why campaign management is getting harder, PPC practitioners point overwhelmingly to measurement and control, in the context of an increasingly competitive environment.

Nearly two-thirds of respondents bemoan black box campaign technology, while a full half cite signal loss in the form of less accurate measurement due to privacy and anti-tracking developments. Encouragingly, Google has been progressively adding more transparency to both Performance Max and Demand Gen, and AI Max was built in a highly transparent manner from day one. This could have the effect of inducing competing ad platforms to also lean into transparency.

The question then remains: what do advertisers do with that data? While automation was highly-cited as easing campaign management in the previous question, it has arguably lowered the possibilities for tactical differentiation. Advertisers are frustrated by limited control over targeting and creatives when CPCs and other ad unit costs continually rise. **While it's becoming easier to manage campaigns in a purely functional sense, it's paradoxically becoming harder to succeed.**

5.4 Agency challenges



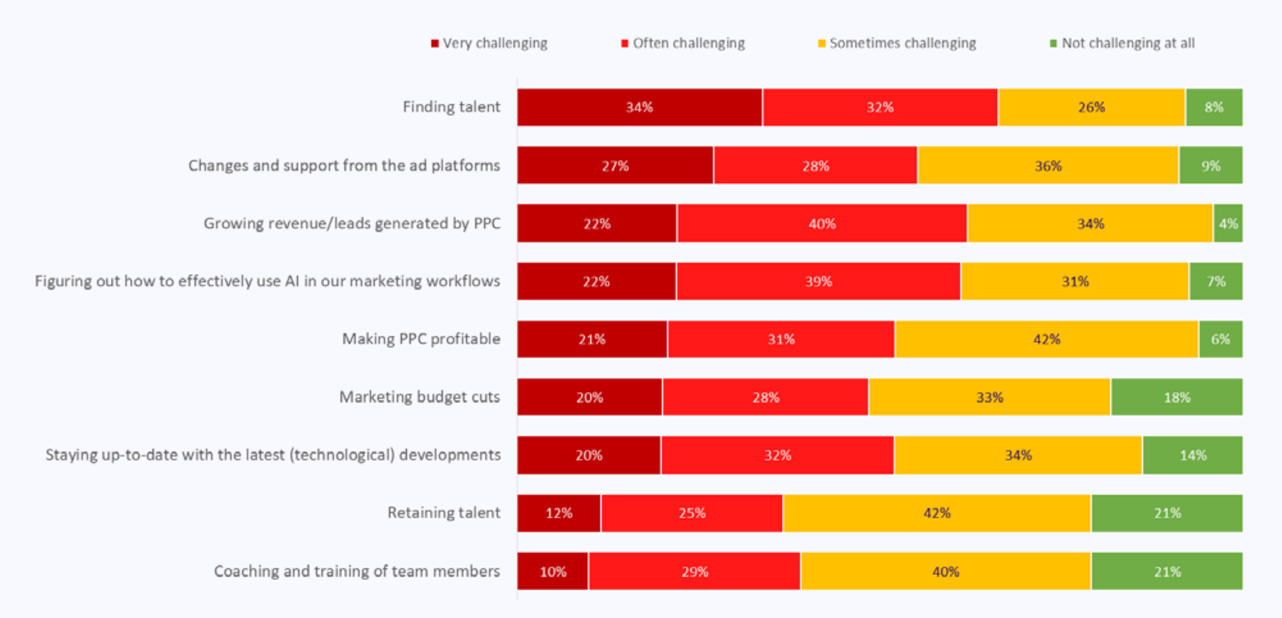
Question asked	Please rate how challenging (or how much of an issue) each of the below is for you or your agency (at least 5).
Who did we ask?	Agencies and freelancers
# of respondents	899
Over-indexing segment(s)	Small agencies (<25 employees): Just 4% find it very challenging to retain talent
Under-indexing segment(s)	Latin America 42% find it very challenging to retain clients 55% find the clients decreasing their advertising budgets very challenging

Of 14 challenges we listed, only three had more than 20% of respondents call them 'Not challenging at all.' Agency life is hard across the board.

And just like two years ago, finding talent is the number one challenge. However, the numbers 2 and 3 challenge swapped places. Growing the agency climbed to second place, with 62% of respondents finding it (very) challenging, up from 56% two years ago.

In past editions, when this was still an open-ended question, managing client expectations consistently topped the list. While it's no longer rated as the most challenging issue, only 10% of agencies say it's not challenging at all.

5.5 In-house challenges

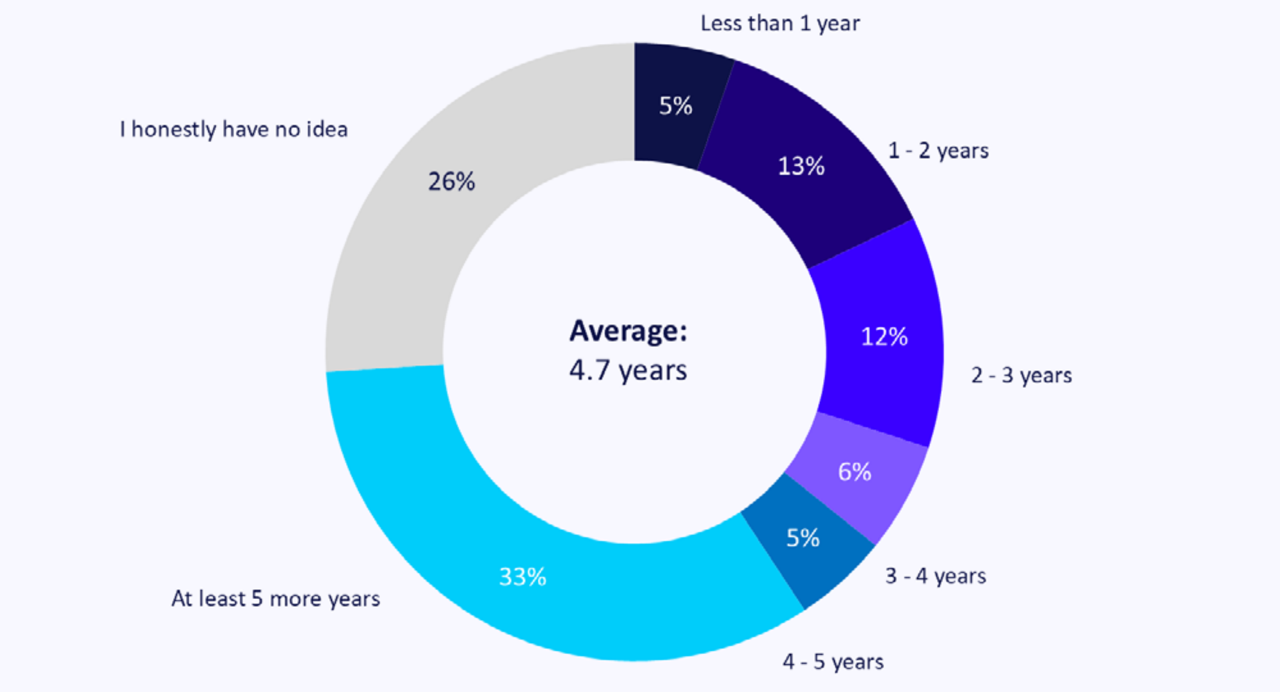


Question asked	Please rate how challenging (or how much of an issue) each of the below is for you or your company (at least 5).
Who did we ask?	In-house teams
# of respondents	297

The irony: in an era obsessed with AI, the #1 in-house challenge is still finding humans. 9 in 10 find this challenging to one degree or another. This can cut two ways since human talent appears to be at a premium, and yet AI could help reduce these bottlenecks. It will be one to watch, as talent concerns were also mentioned in the contexts of coaching and retention.

The other standout theme in these results is likely quite related: adaptation. Ad platform changes, integrating AI into workflows, and keeping current with technology are all commonly cited challenges. There appears to be a consensus that the current rate of change – with no signs of slowing – is becoming burdensome to overwhelming for many teams.

5.6 Expected tenure at current company



Question asked	How long do you expect to keep working at your current company?
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	62% of executives expected to stay at least 5 more years at their current company
Under-indexing segment(s)	17% of individual contributors expected to stay at least 5 more years at their current company

Expected tenure barely moved: 4.5 years in 2024, 4.7 this year. But segment by role, and the picture gets more interesting.

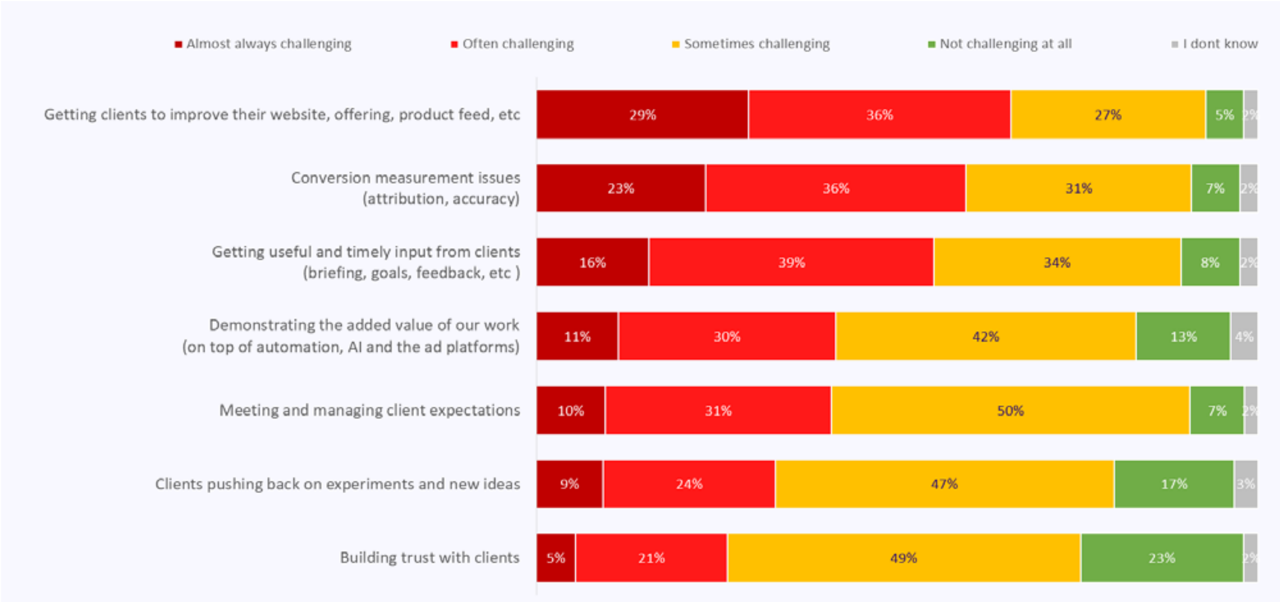
- 62% of executives expected to stay at least 5 more years at their current company.
- While just 17% of individual contributors are expected to stay at least 5 more years at their current company.

If you're running an agency and your ICs are planning to leave within 2-3 years, that's essentially every Performance Max learning cycle. You're constantly training people who leave before they've mastered the platform.

6. The agency-client relationship

In this chapter, it's all about the dynamic between agencies and their clients.

6.1 Challenges with the agency-client relationship



Question asked	Please rate how challenging each of the following issues is in your agency's relationship with clients.
Who did we ask?	Agencies and freelancers
# of respondents	922

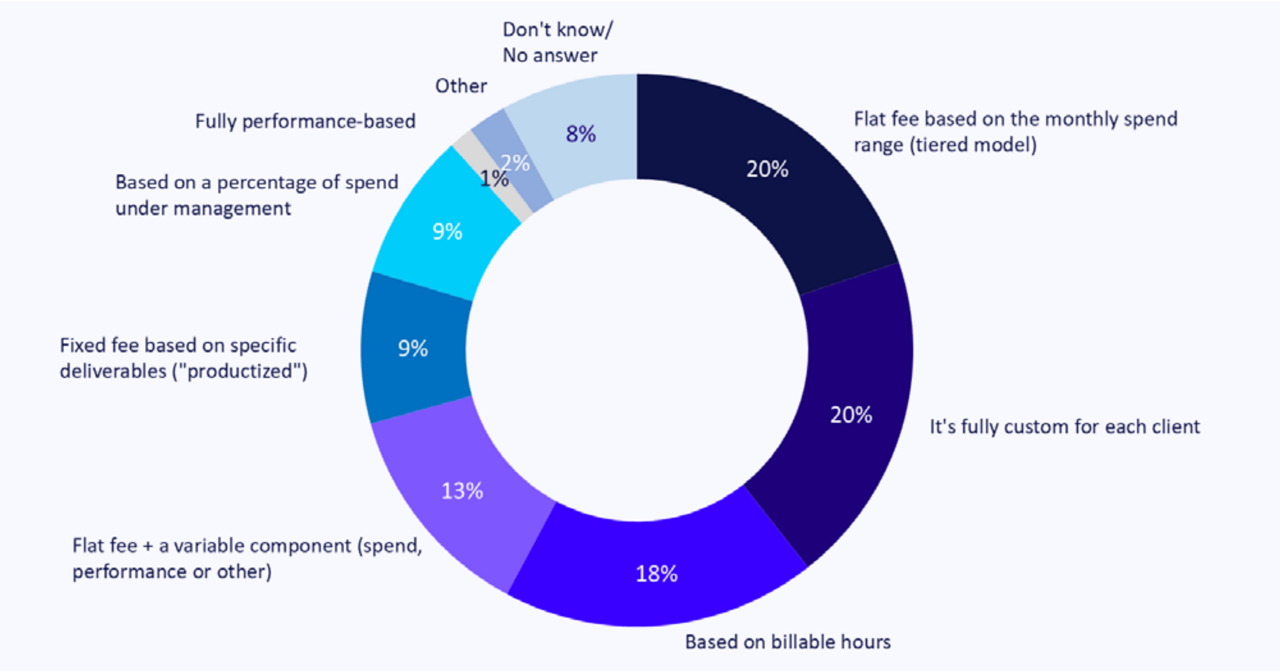
Conversion tracking, website improvements and timely input from the client all happen outside of the ads account.

In other words, the real battle is confidence in measurement and your commercial influence - not fiddling with bids.

As automation gets louder and button-pushing gets commoditised, what remains is strategy, positioning, and holding clients accountable for the things that genuinely improve performance.

Agencies must define themselves as niche partners and not just marketing or 'ads people'.

6.2 Agency pricing models for ongoing PPC management



Question asked	How does your agency price (most) ongoing PPC management?
Who did we ask?	Agencies and freelancers
# of respondents	922
Over-indexing segment(s)	25% of respondents from Continental Europe (and 23% in the UK & Ireland) answered "Based on billable hours" 15% of respondents from North America answered "Based on a percentage of spend under management"
Under-indexing segment(s)	12% of respondents from North America answered "Based on billable hours" 7% of freelancers answered "Flat fee + a variable component"

Despite two years of AI hype, agency pricing models barely budged:

- A flat fee based on the monthly spend range remains the most popular pricing model at 20%.
- Fully custom increased from 16% to 20%.
- Billable hours decreased from 19% to 18%.
- The other models didn't change much in popularity.

In an era of automation and AI, the resilience of the billable hour is remarkable, especially in Europe, where it still leads at 25% (23% in the UK & Ireland). Compare that to Australia & New Zealand at just 4% or North America at 12%, and a clear pattern emerges: the billable hour is a cultural preference, not an operational necessity. As AI compresses the time it takes to deliver results, regions still clinging to this model may find it increasingly difficult to defend.

In a July 2025 article, The Drum reported on findings from Forrester analyst Jay Pattisall, who issued a stark warning about the urgency for agencies to rethink their compensation models in the age of AI:[2]

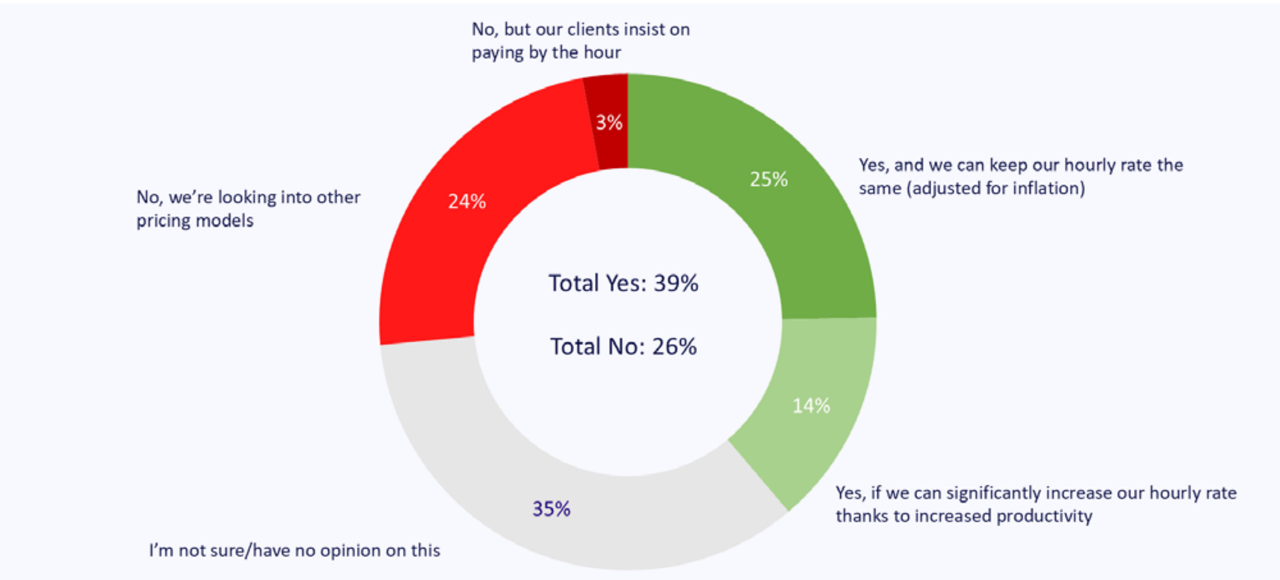
Agencies largely operate on FTE-based pricing models – charging for the time and resource spent on any one account. These models have prevailed due to their comparability in the pitch process, administrative ease and alignment with procurement. But AI is changing this, especially as headcounts decrease.

Back in 2023, Forrester forecast that 7.5% of advertising jobs in the US (around 33,000 advertising jobs) would be automated by 2030. "Based upon my observations, that forecast is conservative. It could be closer to 15-20% and we will be seeing the impacts on head count in the fourth quarter of 2025 and into 2026 and 2027," Pattisall says.

Agencies are positioning themselves as smaller, but smarter, thanks to AI. But as they change, so must their commercial model; otherwise, fewer people inside agencies will mean smaller margins and less revenue.

"It is absolutely an existential issue for agencies to be able to figure out how they get compensated for their use of AI as their head count shrinks," Pattisall adds. "The inability to do so is, well, I'll just say it, a death sentence to their current economic model. It will most certainly result in a number of agencies going out of business if this were to stay as it is."

6.3 Viability of billable hours with AI and automation



Question asked	Do you believe billable hours are a future-proof pricing model, given the rise of automation and AI?
Who did we ask?	Respondents who answered "Based on billable hours" to the previous question
# of respondents	170

[2] The Drum - 'It's a death sentence': agencies urged to urgently act on AI remuneration models (July 2025)

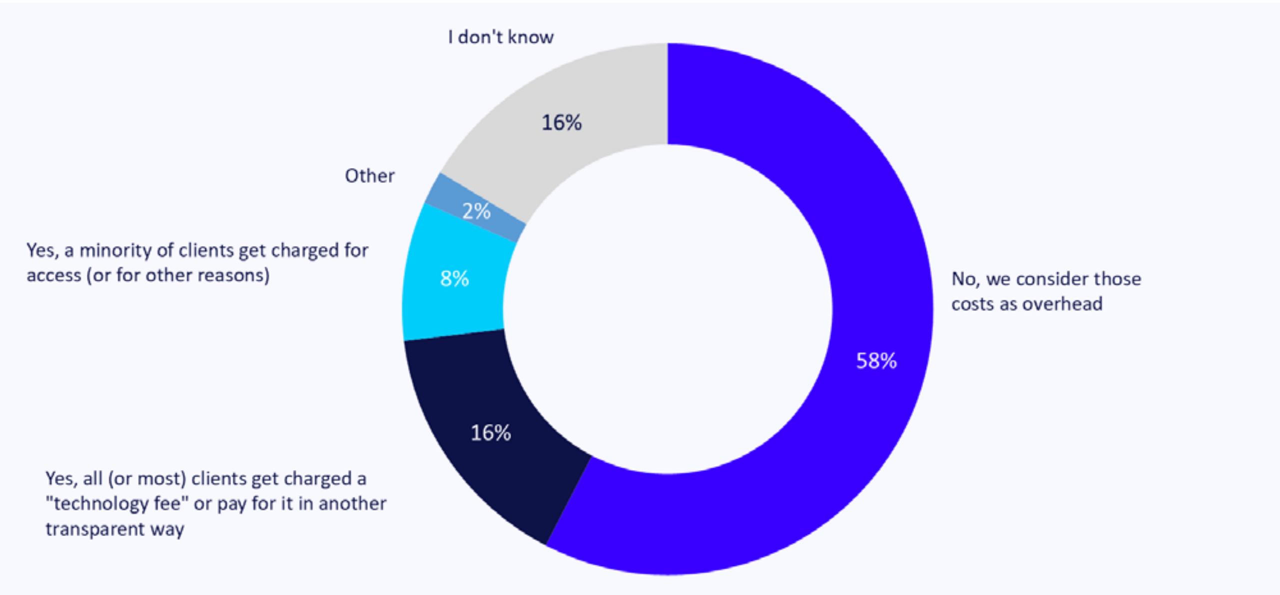
We asked the 170 billable-hour respondents whether they believe this model is future-proof, and the result defied our expectations: 39% said yes (down from 46% two years ago), versus only 27% who said no (same as two years ago).

We're curious what this will look like in the next survey. If you're still in the billable-hour camp, start by following Tim Williams and read his interview with Michael Farmer (author of "Madison Avenue Manslaughter"):

"AI is the final nail in the coffin of hourly billing. Agencies simply cannot capture the value of AI using time-based billing, otherwise agencies will have to start billing by the nano-second.

AI, and new technologies in general, compel agencies to price solutions instead of time. This means agencies must move to a "productized" business model, where they reimagine their offerings not as a bullet-point list of services, but rather a suite of solution sets in the form of programs or products. The new gold standard in compensation is to price the product, not the person (labor hours, staffing plans, etc.)."

6.4 How agencies charge for software used on their clients' behalf

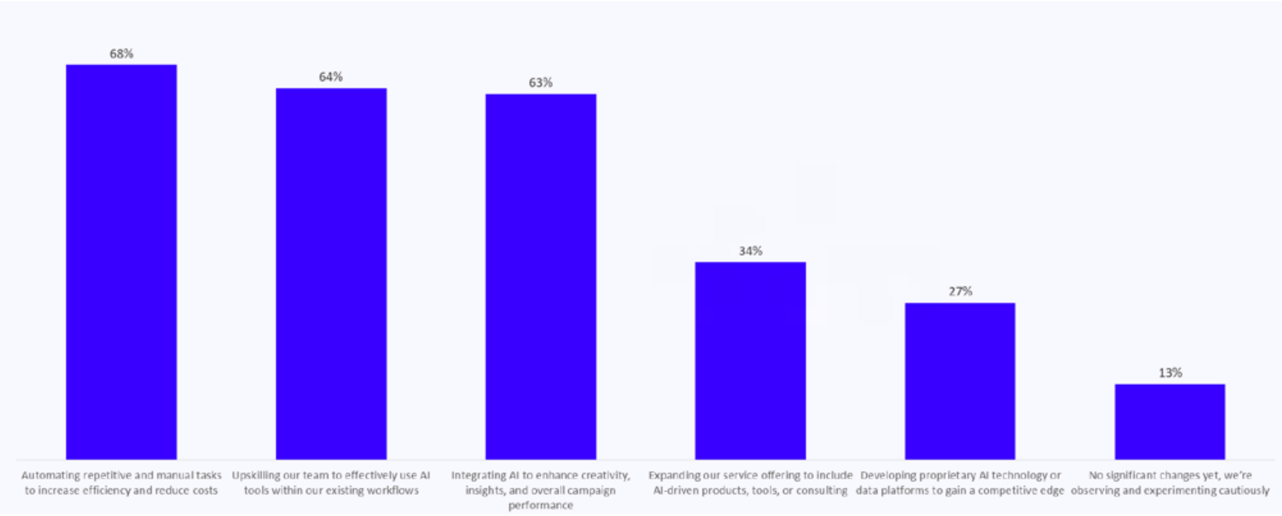


Question asked	Does your agency charge clients for the PPC software your team uses for all (or most of) your clients?
Who did we ask?	Agencies and freelancers
# of respondents	922
Over-indexing segment(s)	43% of respondents from holding companies answered "I don't know"
Under-indexing segment(s)	27% of respondents from holding companies answered "No, we consider those costs as overhead"

The way agencies charge their clients for PPC software, or don't charge at all, hasn't changed compared to two years ago.

The majority of agencies (58%) still absorb these costs, which could be hurting their margins, especially if software spending is outpacing revenue growth. Agencies that aren't transparently passing on or ringfencing software costs may want to revisit this before it becomes a significant drag on profitability.

6.5 How are agencies evolving in response to AI and automation?



Question asked	How is your agency evolving in response to AI and automation? Select all that apply.
Who did we ask?	Agencies
# of respondents	643

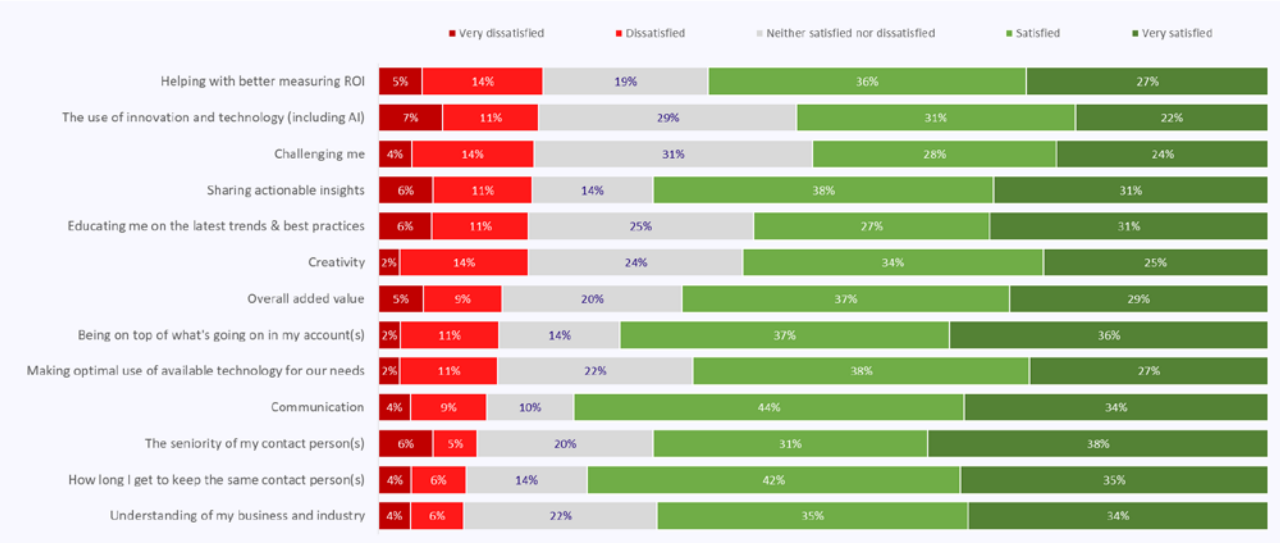
68% are automating repetitive tasks, which is what most agencies should be doing.

Let's be honest, most agencies don't have the resources to build proprietary AI products. Nor should they. That's a distraction for many.

Agencies should use AI for leverage to increase output per head, tighten margins, improve insight and ignite client conversations. Integrate it into strategy and delivery without pretending you're a software company.

Small agencies win by being specific, sharp and operationally lean. Not by trying to out-build Silicon Valley.

6.6 How satisfied are clients with their agency?



Question asked	Please rate how satisfied you are with your current agency with each of the below.
Who did we ask?	Advertisers who hire an agency
# of respondents	83

For the first time in this report, we're sharing results from our smallest segment: advertisers who hire an agency.

Overall, our sample of 83 respondents is quite satisfied with their agency. Satisfaction scores range from 52% ("Challenging me") to 78% ("Communication"), while the highest dissatisfaction score is 19% for "Helping with better measuring ROI".

Measuring ROI" aligns neatly with the top 2 reasons respondents say PPC has gotten harder: **less transparency** from ad platforms (the black box problem) and **less accurate conversion measurement** (cookies, privacy, attribution). It also mirrors the top 2 challenges agencies report with their clients: getting clients to improve their website, offering, or product feed, and conversion measurement issues.

The pattern is clear: **measurement is where practitioner frustration, platform limitations, and agency-client friction all converge.**

Part of the problem is a **maturity gap**. Many accounts are still stuck at basic pixel tracking, while the platforms increasingly reward richer data: enhanced conversions, consent mode, offline conversion imports, profit tracking.

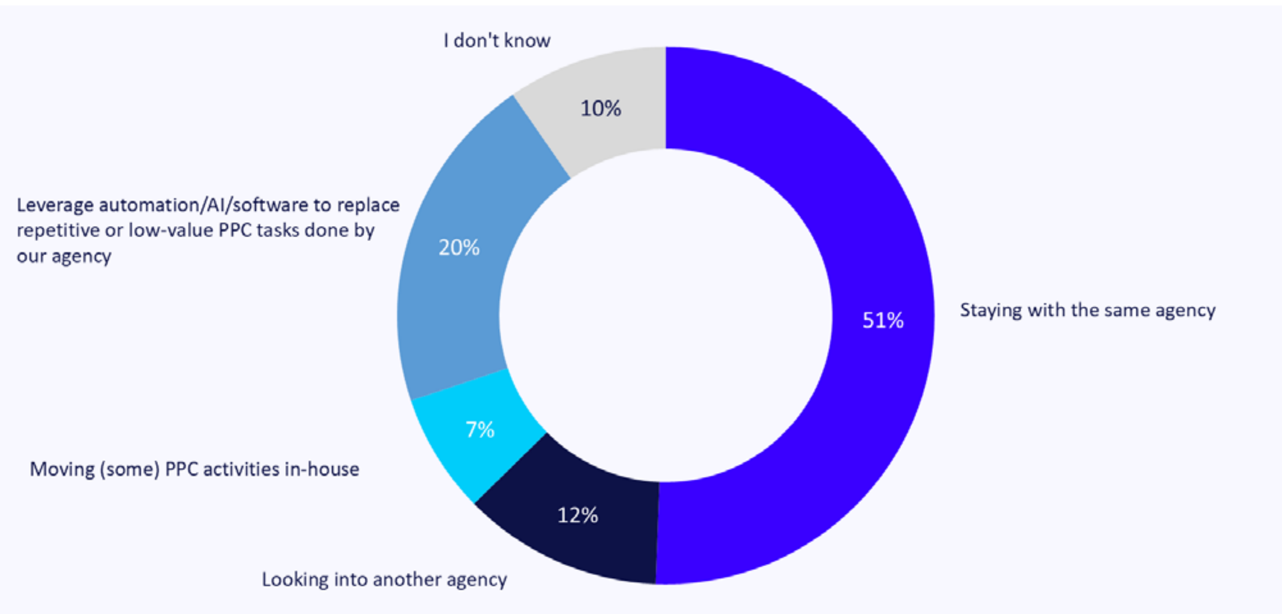
Agencies know they need to climb that ladder, but the rungs above step one often require client-side development resources, CRM access, or legal sign-off on consent frameworks. Without that investment, measurement stays broken and everyone blames each other.

Which is why we recommend agencies and their clients stop having vague conversations about measurement and start making it contractual. Document in the scope of work who owns what: tag implementation, consent mode configuration, CRM data exports, ongoing QA.

When expectations are explicit upfront, the blame game has nowhere to hide.

And finally: **accept what can't be measured, but don't treat that as defeat**. As Kirk Williams argues in Ponderings of a PPC Professional, conversion tracking is "as much of a curse as it is a blessing" because it creates an obsession with directly tracked results that doesn't reflect how people actually buy. The teams that acknowledge measurement gaps and build decision frameworks around them (incrementality testing, blended ROAS targets, directional indicators) will outperform those still chasing perfect attribution.

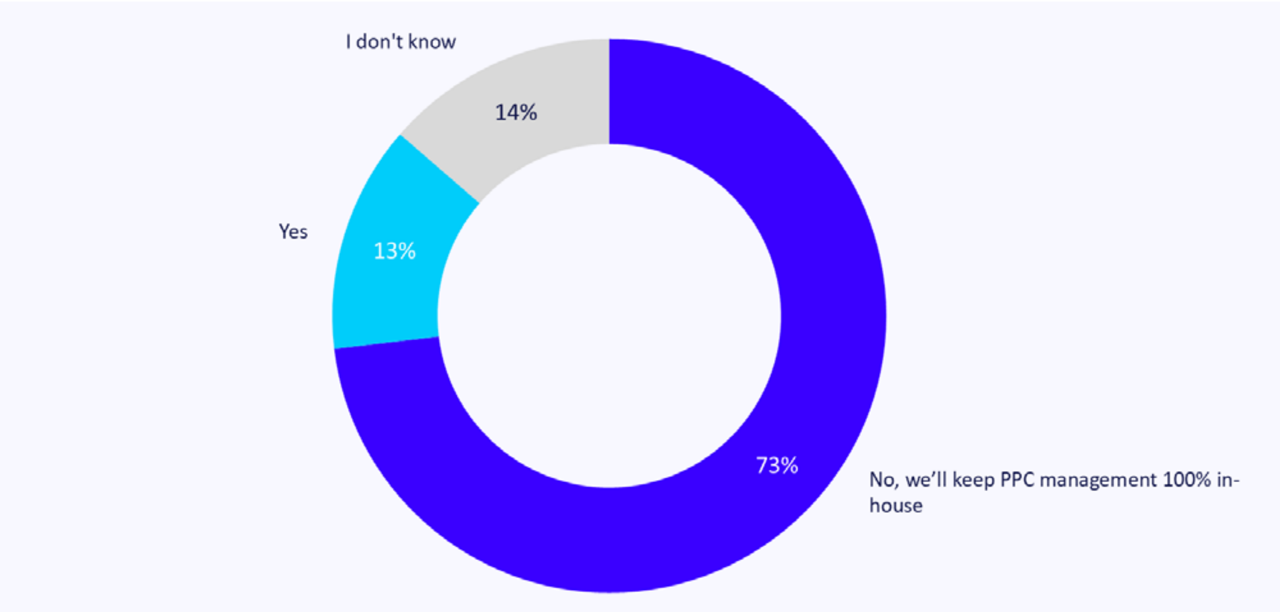
6.7 Are clients planning to stay with their agency?



Question asked	What is the most likely scenario when it comes to managing your PPC campaigns in the coming 1 to 2 years?
Who did we ask?	Advertisers who hire an agency
# of respondents	83

More clients plan to replace agency work with AI (20%) than switch to a different agency (12%). That should worry every account manager reading this.

6.8 Are in-house teams considering external help?

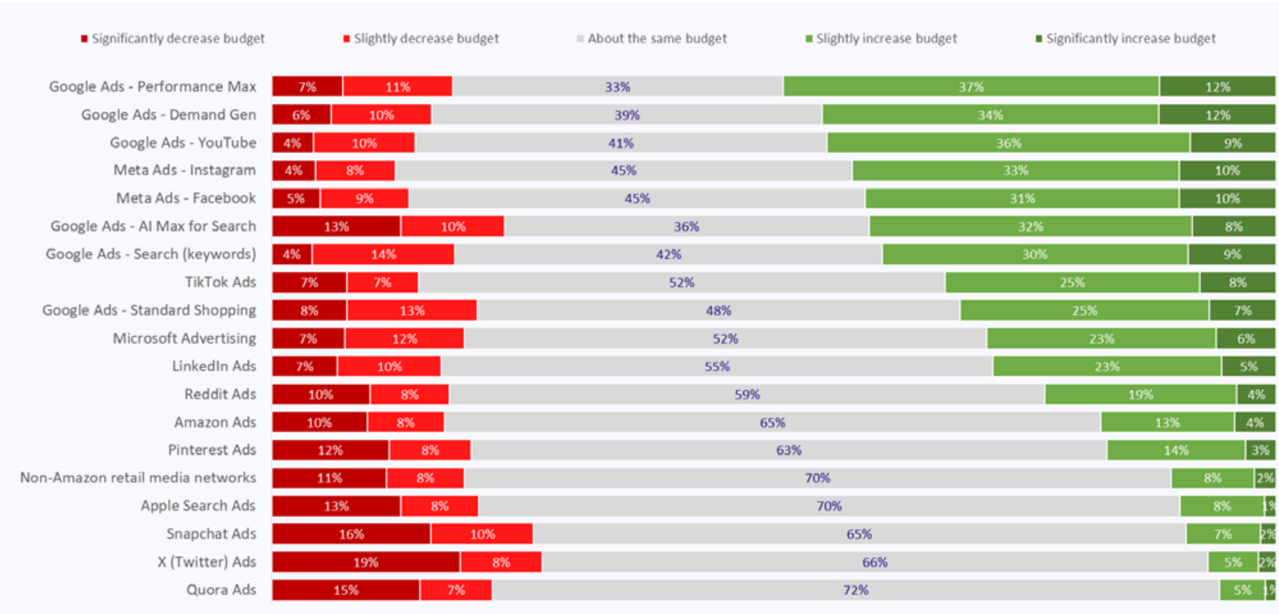


Question asked	Are you considering outsourcing any PPC activities to an agency or freelancer in the coming 12 months?
Who did we ask?	In-house teams
# of respondents	301

In-house teams are digging in. The share committed to keeping PPC fully internal jumped from 44% two years ago to 73% today.

7. PPC Platforms and Management

7.1 Segmented budget expectation for 2026



Question asked	How do you expect budgets to change in 2026 vs. 2025 for each of the following campaign types or ad platforms? Please don't include campaign types or platforms on which you didn't run ads in 2025. We require at least three campaign types/platforms to be answered.
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	Respondents managing more than $3M/mo expected to slightly increase budget for -YouTube (36%) - Reddit (36%)

Results suggest a continued concentration of budget towards Google and Meta. PMax and Demand Gen are winning budgets despite practitioners' complaints. Inevitability is a powerful force.

The longtail channels face a double problem: high unpopularity (more than 1 in 4 advertisers plan to cut spend on X and Snapchat) and high inertia. Spending "about the same" sounds stable, but in practice it means these platforms are losing ground to the bigger ones.

And that's before AI enters the picture. Emergent ad surfaces like ChatGPT ads are still an unknown, but expect them to climb the priority list fast, especially for executives watching organic visibility erode or eager to capture intent in new places. Of the longtail, TikTok is the exception: it's earned a seat at the table, though its momentum has slowed compared to 2024.

As a last note, Amazon ads appear underrepresented in this survey, perhaps due to demographic factors. However, after years spent investing in offsite display targeting, Amazon has a solid audience proposition and is poised to enjoy continued growth.

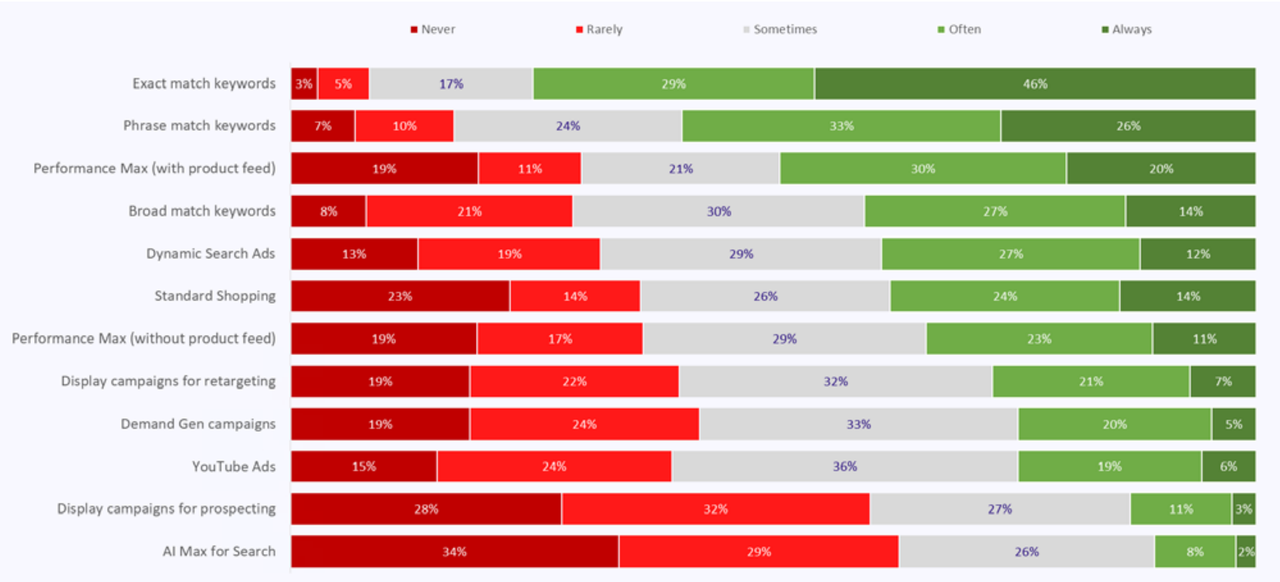
7.2 Google Ads feature adoption & satisfaction

We asked the individual contributors and freelancers who manage paid search about different Google Ads features and grouped these features into the following categories:

- Targeting options & campaign types
- Bid strategies
- Additional tools & features

7.2.1 Targeting options & campaign types

Adoption



Question asked	Please indicate how often you use each of the following targeting options/campaign types in Google Ads.
Who did we ask?	Individual contributors and freelancers
# of respondents	673

The popularity of targeting and campaign options cuts along two dimensions: the level of control vs. automation, and the buying funnel position. Popular options tend to be more controlled and/or lower-funnel, while unpopular options tend to be more automated and/or upper-funnel.

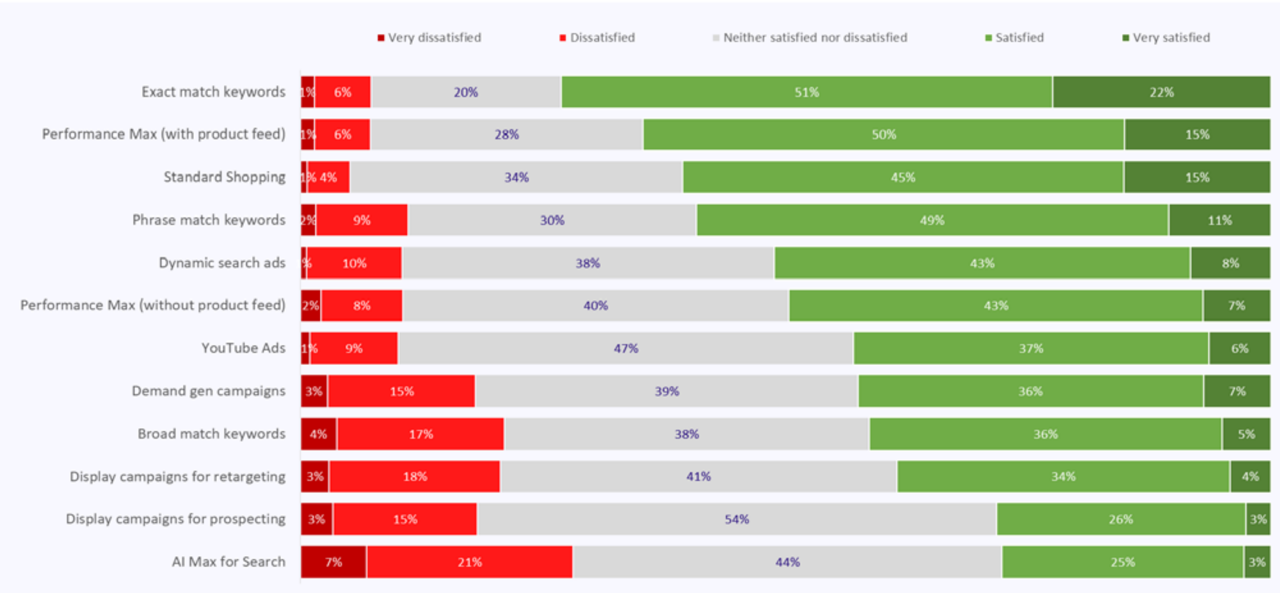
Perhaps no juxtaposition is more striking than the popularity of exact match keywords vs. AI Max (which serves largely as a broad match and keywordless tool). This will pose major challenges to the adoption of AI Max, which Google claims should offer the most benefit to exact match users, who might not be willing to budge.

We recommend reading Brad Geddes' article [Is your account ready for Google AI Max? A pre-test checklist]() for the steps you should take before you decide to test AI Max.

Note: AI Max might additionally be punished in these results simply because it is the newest technology and had only recently left beta at survey time.

Another standout comparison in this survey is Performance Max vs. Standard Shopping. First with Smart Shopping and later with PMax, Google has offered competing products since 2018, yet Standard Shopping still remains quite a popular campaign type. It's used often or always by 38% of respondents, while PMax scores 50%.

Satisfaction



Question asked	Please indicate how satisfied you are with the results of these targeting options/campaign types in Google Ads.
Who did we ask?	We only asked about satisfaction with a feature if the respondent answered "sometimes" or more often for that specific feature
# of respondents	Up to 619, depending on the feature

Not only are classic technologies like exact match keywords and Standard Shopping campaigns still widely adopted – they also score very high in terms of satisfaction. This is again relevant in considering the likelihood of AI Max to gain traction amongst exact match users.

One surprising outcome of this response is the position of broad match, which is the only product presenting a notable contradiction between adoption and satisfaction. Although it is the fourth most-used product in the previous question, amongst those users it's also the fourth least-satisfying product.

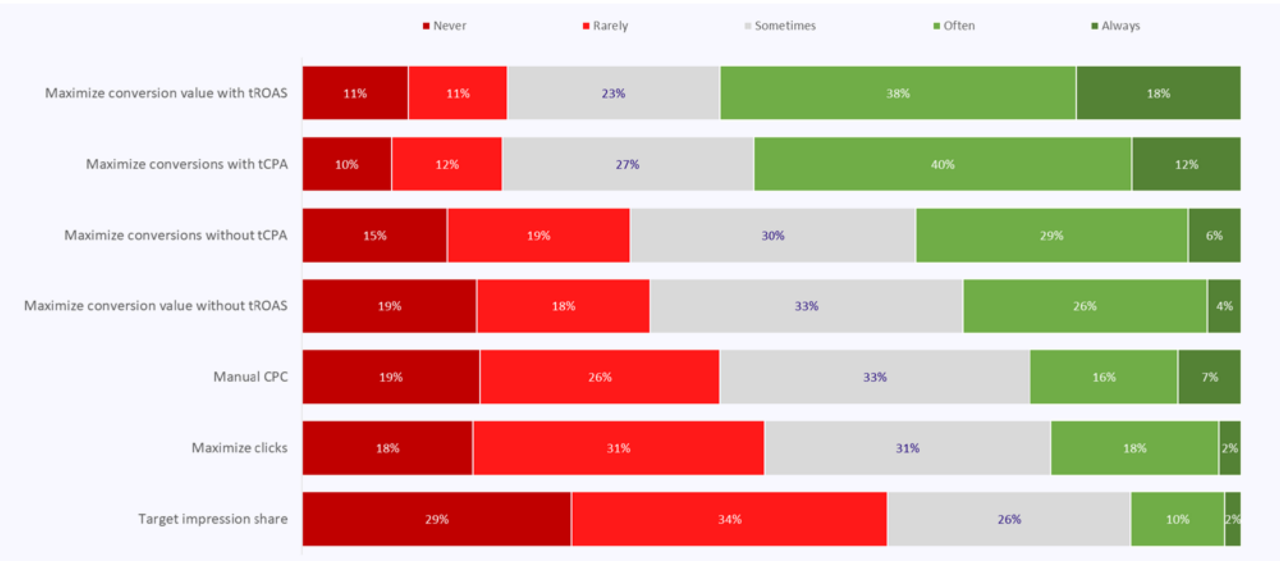
Another fascinating, but opposite, example is Shopping, which has a satisfaction score that notably outweighs its popularity score. If advertisers are so satisfied, why don't they use it more? It's likely that, despite enjoying Shopping's features, PMax delivers stronger raw performance. Indeed, feed-only PMax has a higher satisfaction score than Shopping.

These discrepancies highlight advertisers' overall preference for controlled targeting, while suggesting that they will be pragmatic and use other technologies that go against that preference.

This chart reconciles the data of the past two questions into one shared view. Products or features that sit above the line have a satisfaction that overindexes their adoption, while those below the line underindex. Note the positions of Shopping and Broad Match, discussed in the paragraphs above.

7.2.2 Bid strategies

Adoption



Question asked	Please indicate how often you use each of the following bid strategies in Google Ads.
Who did we ask?	Individual contributors and freelancers
# of respondents	673

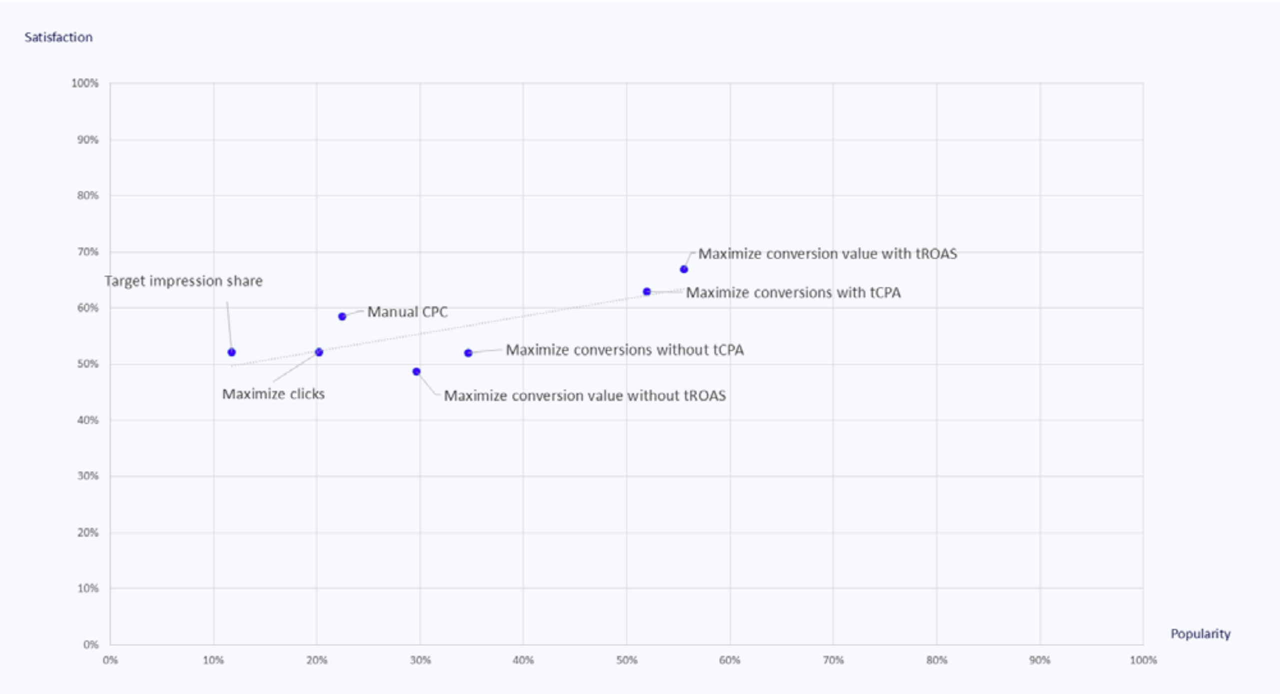
Satisfaction

Question asked	Please indicate how satisfied you are with the results of these bid strategies in Google Ads.
Who did we ask?	We only asked about satisfaction with a feature if the respondent answered "sometimes" or more often for that specific feature
# of respondents	Up to 532, depending on the feature

Not surprisingly, advertisers are predominantly happy with Google's ability to manage their bids. Bidding is one of the oldest in-platform automations and one of the best developed.

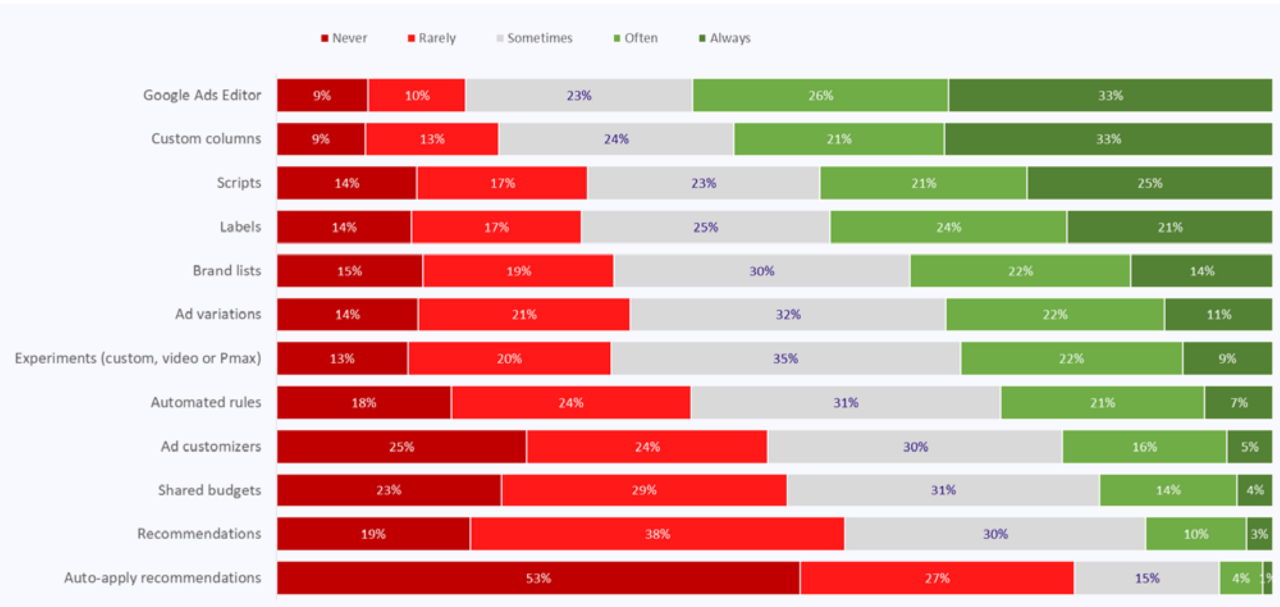
Zooming in on advertiser preferences, we find that bid strategies with explicit performance targets like **target ROAS (tROAS)** and **target CPA (tCPA),** have become the undisputed favorites. As in the previous edition of this report, **tROAS** and **tCPA strategies** are the most frequently used, and continue to outperform alternatives in terms of satisfaction.

There is a notable gap in satisfaction between **automation with constraints** and **the same ones without constraints**. While strategies such as Maximize conversions and Maximize conversion value (without targets) remain widely used, satisfaction with these approaches consistently trails their target-based counterparts. This suggests that PPC professionals are increasingly aware that automation works best when given clearly defined constraints.



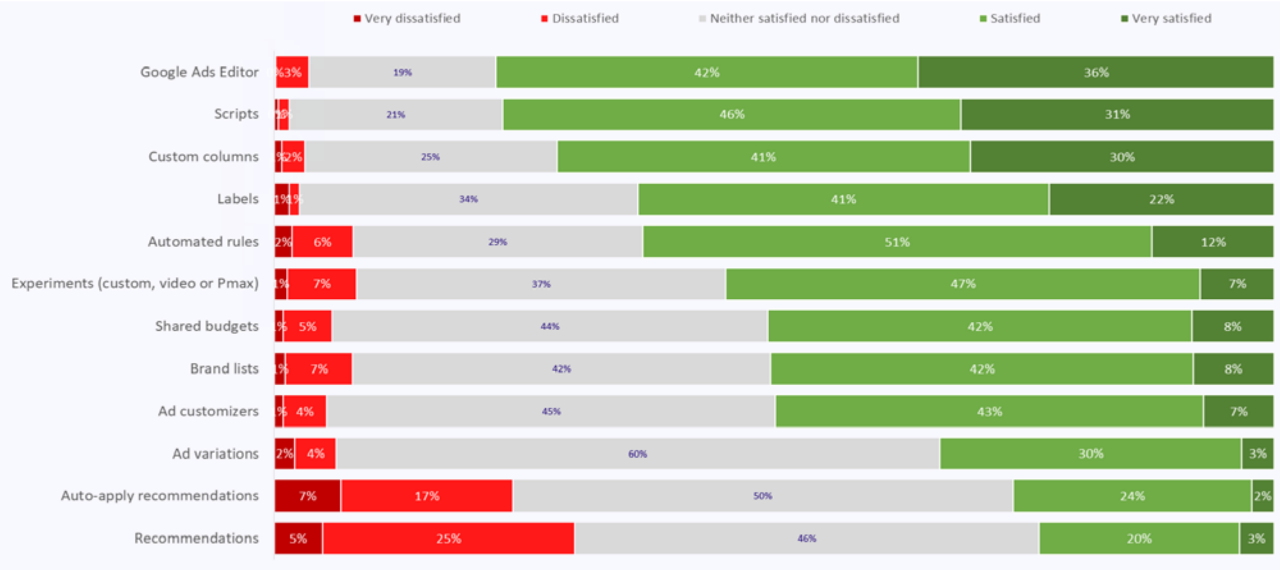
7.2.3 Additional tools & features

Adoption



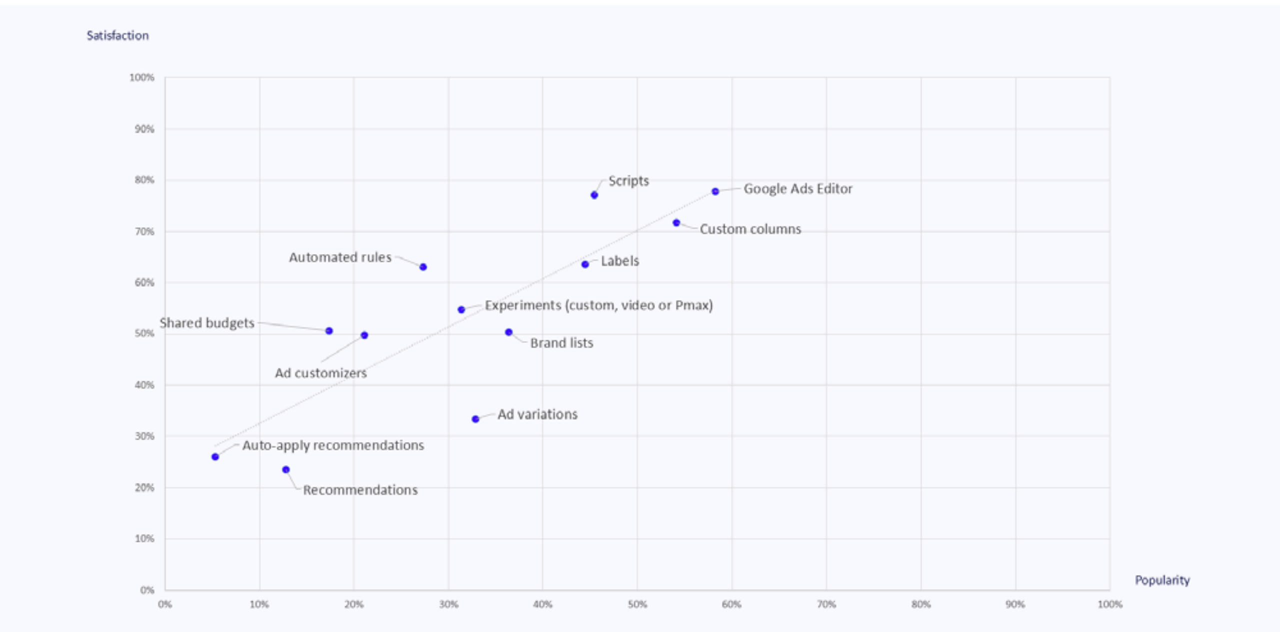
Question asked	Please indicate how often you use each of the following additional tools and features in Google Ads.
Who did we ask?	Individual contributors and freelancers
# of respondents	673

Satisfaction



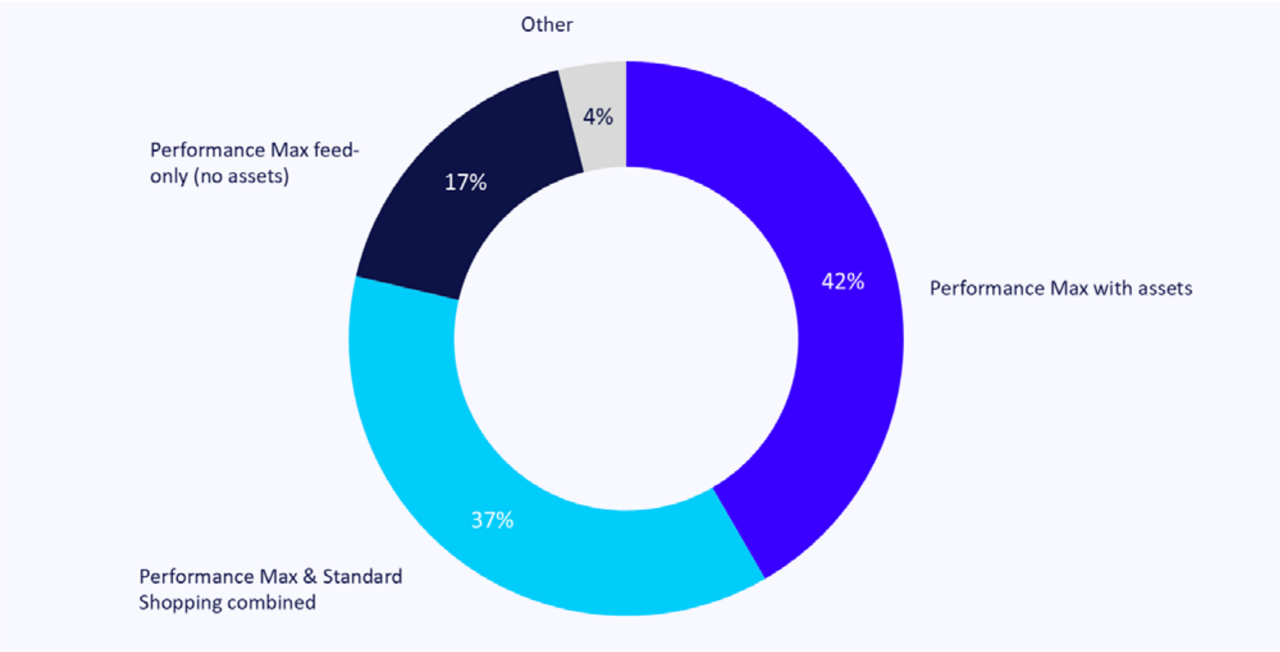
Question asked	Please indicate how satisfied you are with the results of these additional tools and features in Google Ads.
Who did we ask?	We only asked about satisfaction with a feature if the respondent answered “sometimes” or more often for that specific feature
# of respondents	Up to 552, depending on the feature

Very little has fundamentally changed over the years. Google Ads Editor and custom columns remain heavily used, confirming they are core workflow tools, not fads. Scripts have ticked up slightly over the past 2 years showing more PPCers leaning on automations to aid their work.
But optimisation score, recommendations, and auto-apply recommendations are still largely distrusted. Auto-apply in particular remains firmly in the ‘no chance’ bucket. That tells us something important. Marketers will adopt tools that increase control and insight, but resist tools that reduce it.
Automation is accepted. Blind delegation to Google is avoided.



7.3 Performance Max

7.3.1 Performance Max campaign structure



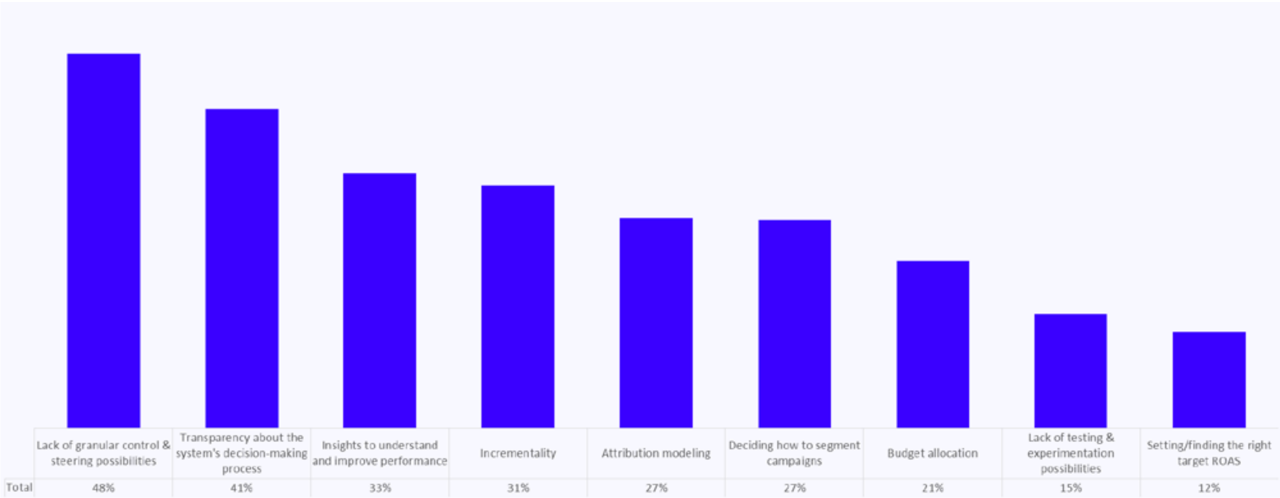
Question asked	Which of the following Performance Max campaign structures do you currently use (predominantly)?
Who did we ask?	Individual contributors and freelancers who manage Google Shopping (including Pmax) campaigns
# of respondents	557
Over-indexing segment(s)	25% of respondents from Continental Europe predominantly use Performance Max feed-only (no assets)
Under-indexing segment(s)	34% of respondents from Continental Europe predominantly use Performance Max with assets

PMax is the campaign type that gives Google the most leeway to show ads where they deem them relevant, and their push to get advertisers on Pmax has resulted in widespread adoption. But advertisers can choose their flavor of PMax (with or without assets) and can continue to deploy traditional campaign types (like search or shopping) alongside PMax.

Advertisers are embracing this choice and are choosing to retake control by running it in conjunction with standard shopping, as well as giving up control, by adding assets that make their ads eligible to appear on more surfaces.

Advertisers from Continental Europe are an outlier with 25% running feed-only PMax campaigns compared with 17% overall and only 34% running PMax with assets, compared to 42% overall.

7.3.2 Performance Max challenges



Question asked	Please select the biggest challenges you're facing with Performance Max (1 to 3 options)
Who did we ask?	Individual contributors and freelancers who manage Google Shopping (including Pmax) campaigns
# of respondents	560

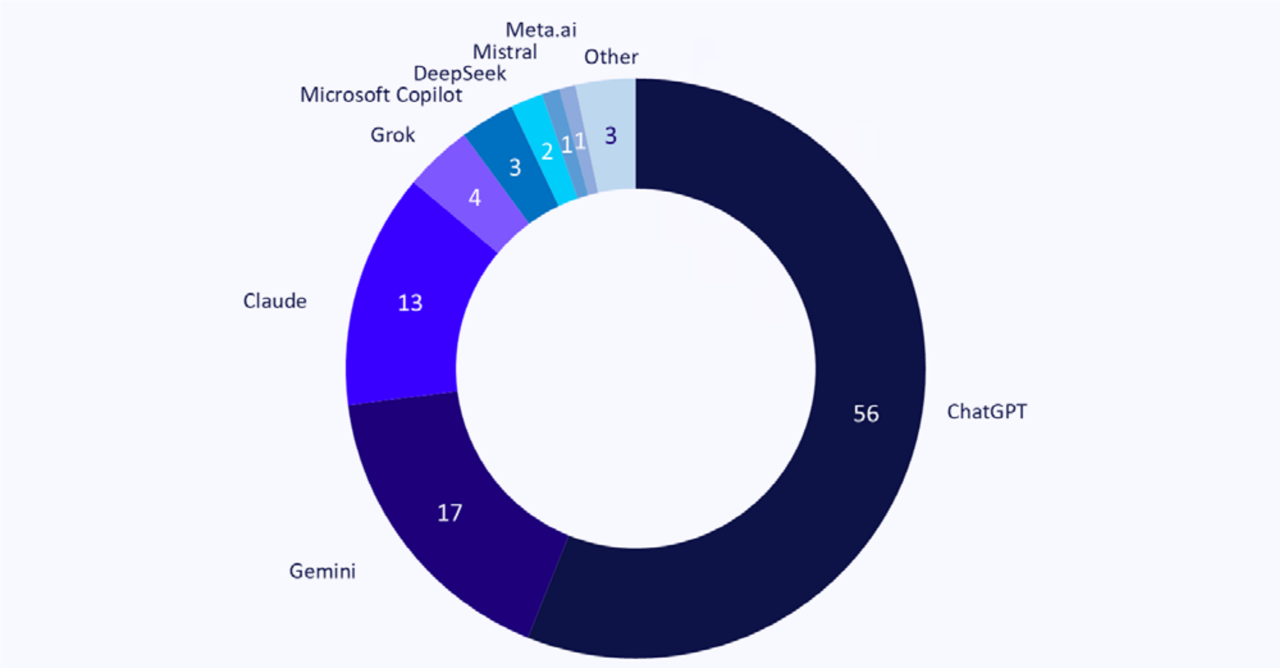
Two years on, the complaints about PMax haven't changed. Not because advertisers haven't tried harder, but because the problems are structural. Black box targeting, opaque attribution, no experimentation capability, or the ability to understand and influence outcomes continue to frustrate advertisers. Unfortunately, these aren't growing pains. This is the product.

Despite improvements to reporting and incremental feature updates, many advertisers still struggle to meaningfully guide Performance Max once it is live. These issues reflect a broader concern: **Performance Max blurs boundaries** — between channels, formats, and intents, making it harder to answer fundamental questions about where performance is coming from and how spend should be adjusted. Studies by Adalysis and Optmyzr showed that there is significant cannibalization of search keywords when PMax is also active in an account. This, despite Google's assurance that search campaigns should receive priority when their keywords match the search terms, perfectly illustrates one of the core reasons advertisers struggle with PMax.

Advertisers are willing to accept automation at scale, but only reluctantly accept the trade-offs in visibility and control that come with it. This tension helps explain why, as shown in the previous section, many advertisers deliberately constrain Performance Max through feed-only or hybrid structures rather than adopting a fully open, full-funnel approach.

8. AI in PPC

8.1 Popularity of each LLM

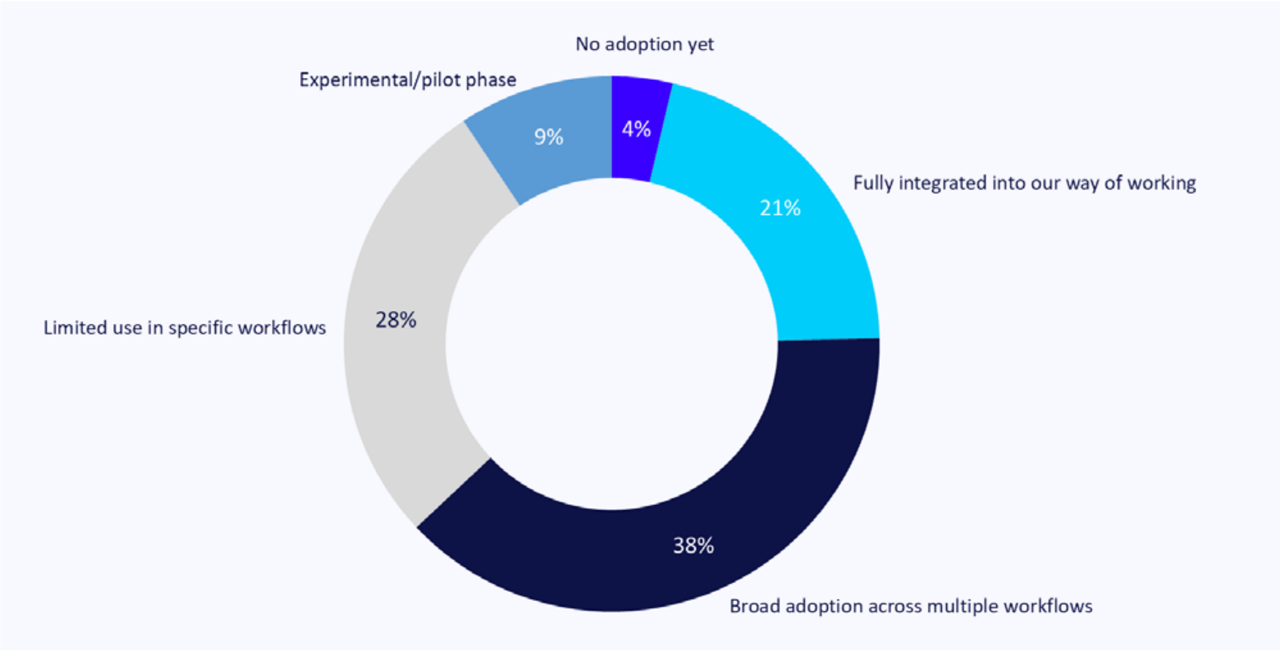


Question asked	Please indicate how often you use each of the Large Language Models (LLMs) by assigning percentages that add up to 100%
Who did we ask?	Everyone
# of respondents	1,306

ChatGPT is the most popular solution used by PPC Specialists across all company types. The runner up is Gemini. The biggest difference in the usage of models can be seen in PPC freelancers who spend 17% of their time in LLMS using Claude, versus an average of 12% across the other company types. For the solo freelancer, Claude might already partially act as a virtual strategist and tool to create scripts to automate work, explaining why their usage significantly outpaces the broader industry average.

Worth noting: this survey ran while Google released Gemini 3 and Anthropic released Claude Opus 4.5. Both models were widely praised, and anecdotally, we've seen more practitioners shifting toward Gemini and Claude since. If that trend holds, ChatGPT's first-mover advantage may not survive next year's survey.

8.2 Approach to AI for in-house PPC teams



Question asked	How would you describe your company's approach to AI adoption in PPC?
Who did we ask?	In-house teams
# of respondents	300

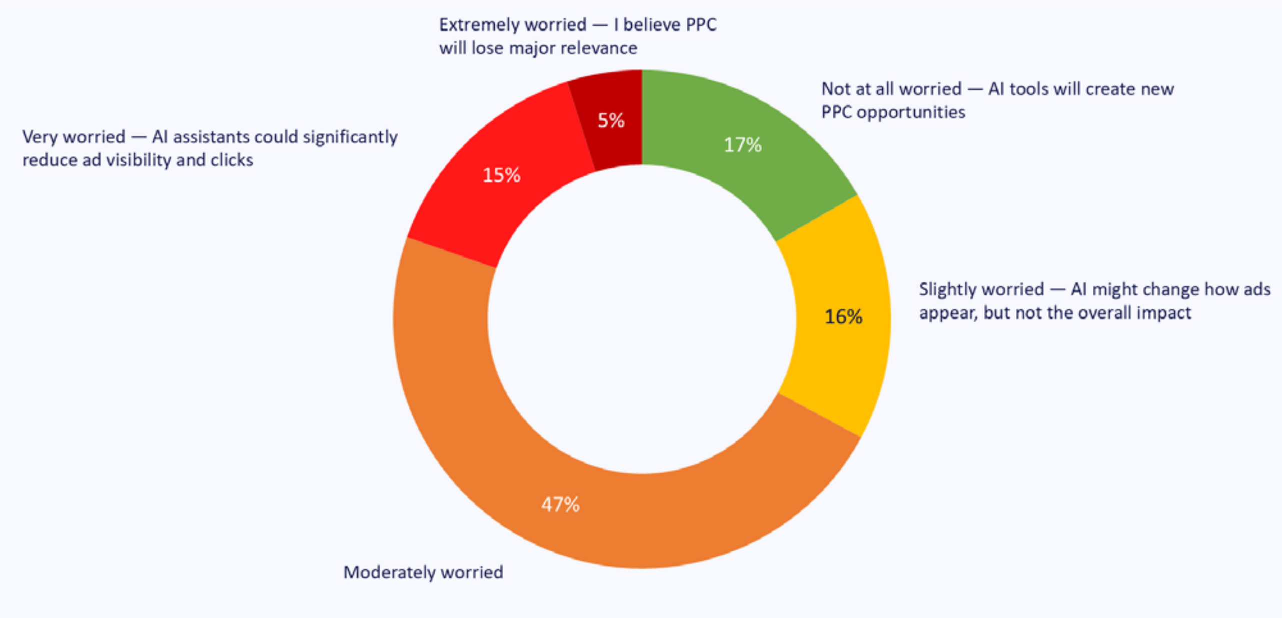
Nearly **60% of in-house respondents indicated they've actively embraced AI** - either across multiple workflows, or fully integrated into their organization. However, the data also reflects that many teams are still experimenting rather than fully committing. Another **28% use AI for limited use in specific workflows**, while 9% are in a testing phase, and 4% have yet to give AI a try.

From a regional perspective, North America, Europe, and South & South East Asia basically reflect the same application of AI to PPC workflows, while the UK & Ireland appears slightly more cautious, with more respondents falling into experimental or no adoption categories. The respondents for other regions aren't statistically significant for analysis.

PPC spend is where we see a significant difference in adoption/implementation rates. As you might expect, the lower the spend, the more likely the respondents selected "no adoption" or experimental usage. For in-house teams managing $3M or more, **31% have broadly adopted AI** across multiple workflows - compared to the overall average of 21%. In-house teams with a high PPC spend have no doubt found that leveraging AI for scalability is worth the investment.

While we can't compare these data points against previous data, it will be really interesting how this develops and changes the next iteration of this PPC survey.

8.3 Concerns about the future of PPC with the rise of AI-powered search



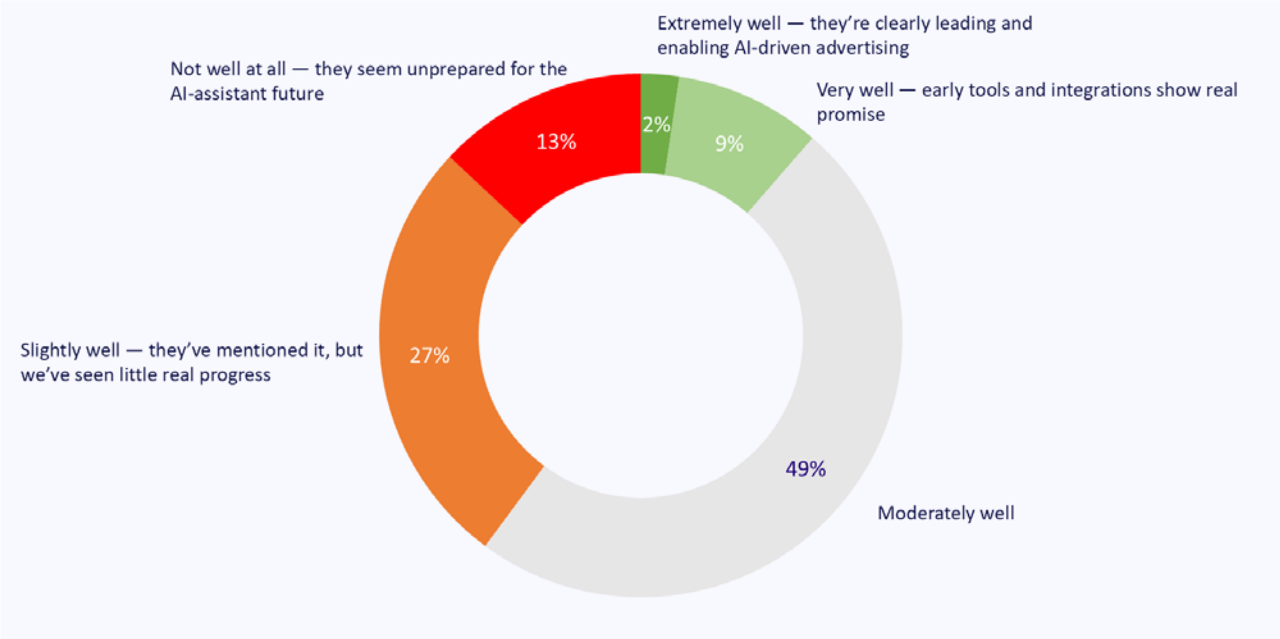
Question asked	How worried are you about the future of PPC if users increasingly rely on AI tools like Perplexity and ChatGPT to find information and products?
Who did we ask?	Everyone advertising on Google
# of respondents	1,272

8 in 10 survey respondents worry about paid media in relation to AI-powered search. I don't. While this is clearly a time of transformation, it's not necessarily one of disruption. Google remains largely dependent on advertising revenue, and this dependency is unlikely to change soon. What ads look like, where they appear, and where they lead could all evolve over time; however, ads will remain.

It's in the platform's own interest to carefully regulate this shift. Case in point: three years after announcing ads in AI surfaces, those experiences are still in a limited beta. Plus, these ads serve from the same campaign types we're already using! There is a challenge, yes, but also a tremendous opportunity. Winning advertisers will be those with high-quality data integrations that offer strategic guidance to campaigns otherwise suffering from performance tunnel vision.

Mike Ryan, Head of Ecommerce Insights at Smarter Ecommerce

8.4 Satisfaction with Google and Microsoft regarding AI advertising



Question asked	How well do you feel Google and Microsoft are helping advertisers transition to reaching users in AI or Copilot modes?
Who did we ask?	Everyone advertising on Google
# of respondents	1,272
Over-indexing segment(s)	33% of respondents from South & Southeast Asia answered "Extremely well" or "Very well" 20% of respondents from holding companies answered "Not well at all"

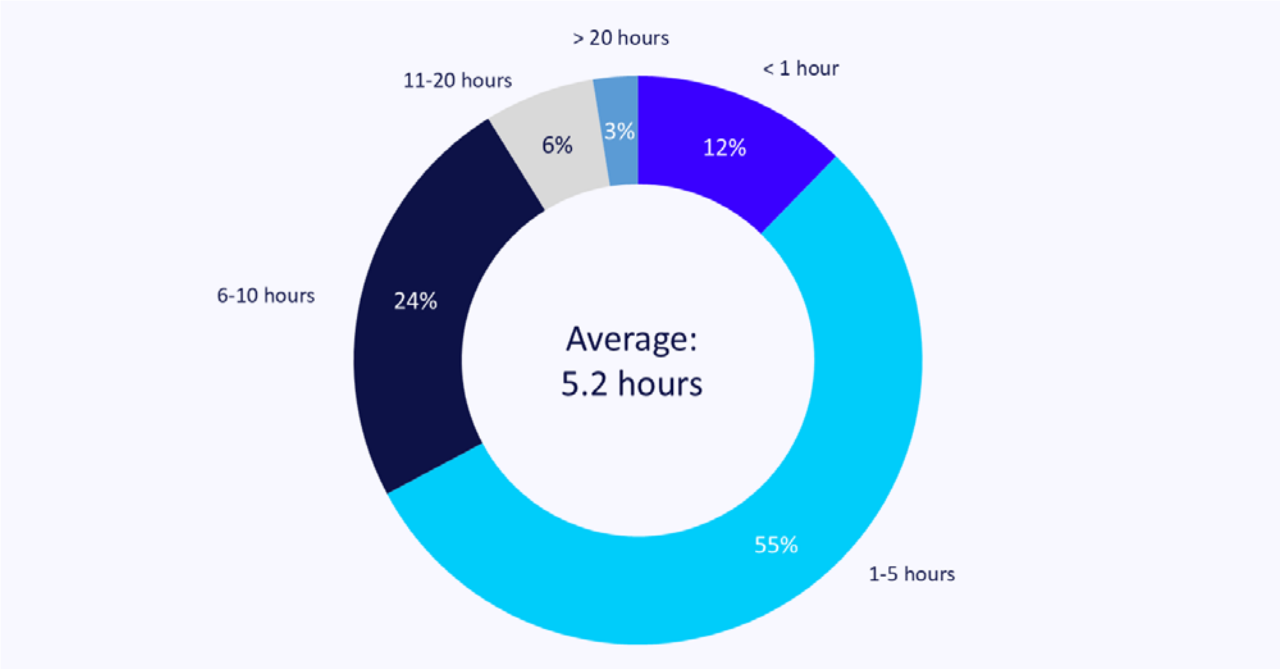
Perhaps to be expected, most respondents sit in the middle.

Nearly half describe Google and Microsoft's transition support as "moderately well", with another quarter saying "slightly well". Very few think they're leading confidently, and a noticeable minority still feel the platforms seem unprepared.

Platforms might be evolving quickly, but communication and clarity are not evolving at the same speed.

If advertisers feel only 'moderately' supported during this shift, then they will need to bridge the gap themselves rather than waiting for perfect guidance.

8.5 Weekly time savings thanks to AI



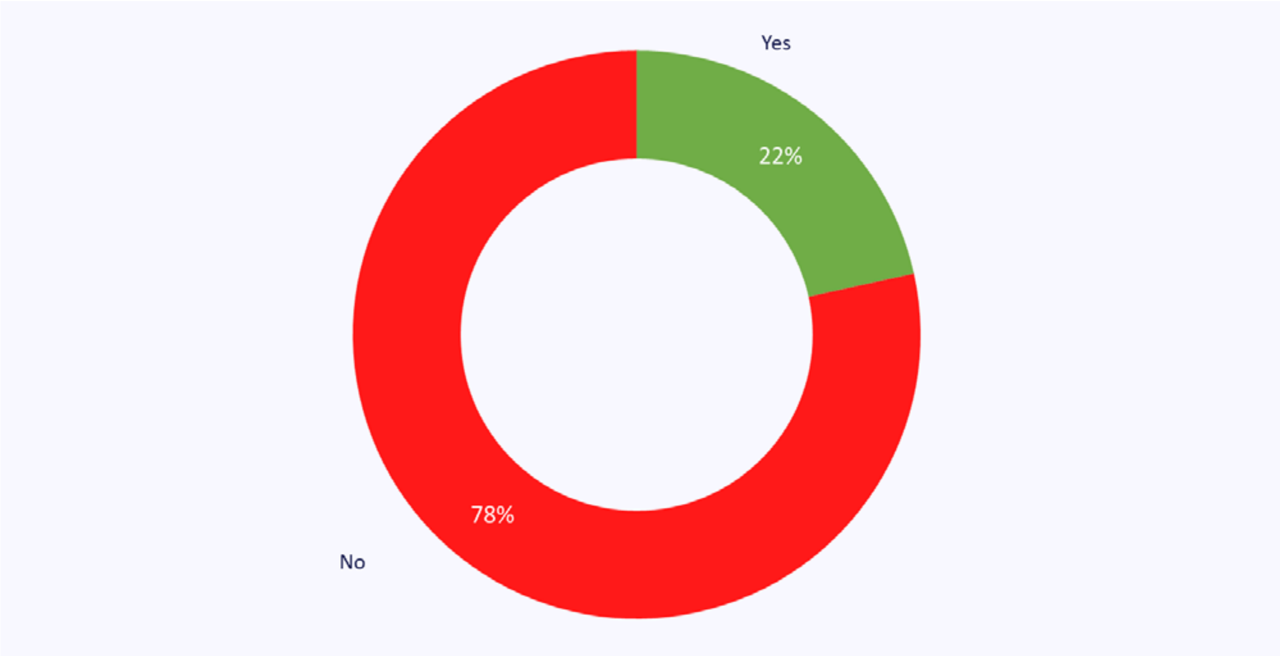
Question asked	How many hours per week do you estimate AI tools save you on PPC management and optimization tasks?
Who did we ask?	Individual contributors and freelancers
# of respondents	668
Over-indexing segment(s)	62% of agencies answered "1-5 hours"

Most PPC professionals report saving one to five hours per week with AI. Useful, but not dramatic. Time savings do increase with account complexity and budget size, which makes sense: more moving parts means more opportunities for automation to matter. But the absence of transformative gains is notable. Almost nobody reports saving 20+ hours per week, the threshold where AI would start replacing meaningful portions of a person's workload.

Who benefits most? Mid-career practitioners (those with five to ten years of experience) report the strongest time savings. They have enough technical fluency to actually integrate AI into their workflows, plus enough autonomy to make it stick. Newer practitioners are often too constrained to deploy AI deeply; very senior ones may already operate within systems that leave little room for incremental improvement.

Organization size plays a role too. Freelancers and small agencies report bigger efficiency gains than large agencies and HoldCos. In smaller operations, AI directly extends capacity. In larger ones, bureaucracy and existing enterprise tooling absorb a lot of the potential impact. Across the board, AI is functioning as an assistant for drafting, summarizing, and accelerating specific tasks, not yet as something that autonomously runs campaigns.

8.6 Adoption of “Vibe coding”



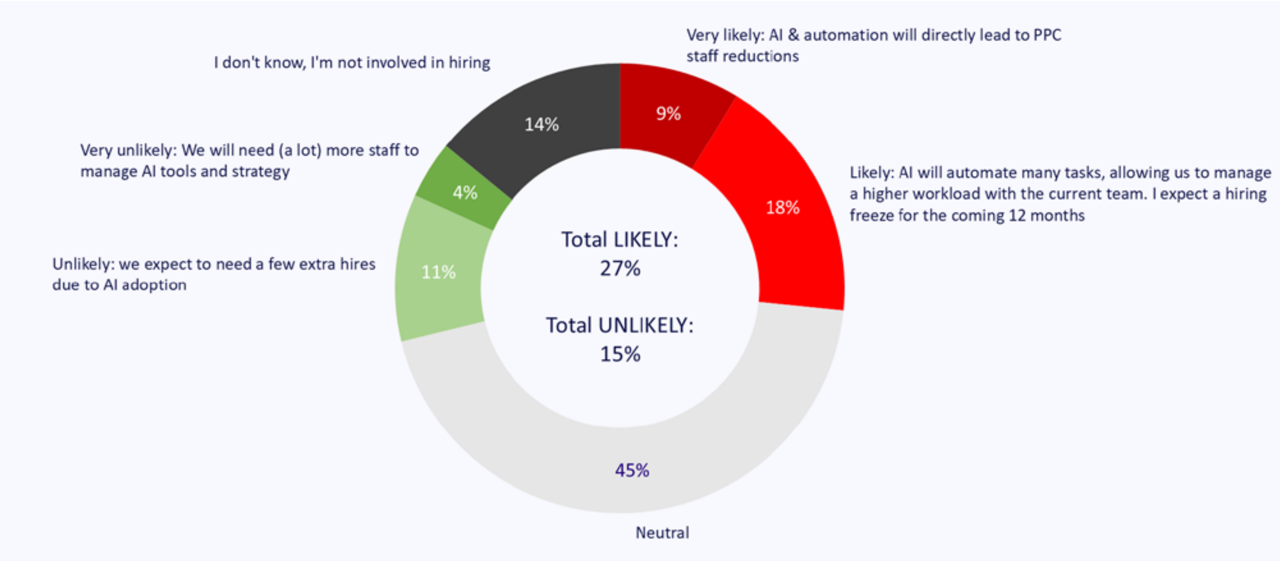
Question asked	Are you using any AI-powered tools, such as Airtable, Bolt, Glide, Lovable, Replit, Softr, etc , to create low-code/no-code apps for (PPC) marketing? In other words: are you “vibe coding”?
Who did we ask?	Individual contributors, team managers, and freelancers
# of respondents	956

22% of PPC professionals are now using AI to build their own tools like custom workflows, lightweight apps, and automations, without writing traditional code. Two years ago, this behavior barely existed. Today it has a name: vibe coding.

The survey captured early adoption, but adoption is almost certainly accelerating. Claude Code went viral in January 2026, after our survey closed, introducing a new wave of marketers to the idea that they could describe what they wanted and have AI build it.

The current adoption rate looks modest, but the more important signal is the direction. PPC professionals who can prototype and deploy their own tooling have a meaningful edge, they’re not waiting on engineering backlogs or settling for off-the-shelf solutions that don’t quite fit. Vibe coding is making that capability available to a much broader group, and the tools keep getting easier. Expect this number to look very different in our next survey.

8.7 Impact of AI on hiring plans



Question asked	How likely is it that your company's hiring for PPC roles will be negatively affected by the adoption of AI and advanced automation in the next 12 months?
Who did we ask?	Agencies and in-house teams
# of respondents	944
Over-indexing segment(s)	57% of respondents from South & Southeast Asia answered "(very) likely"

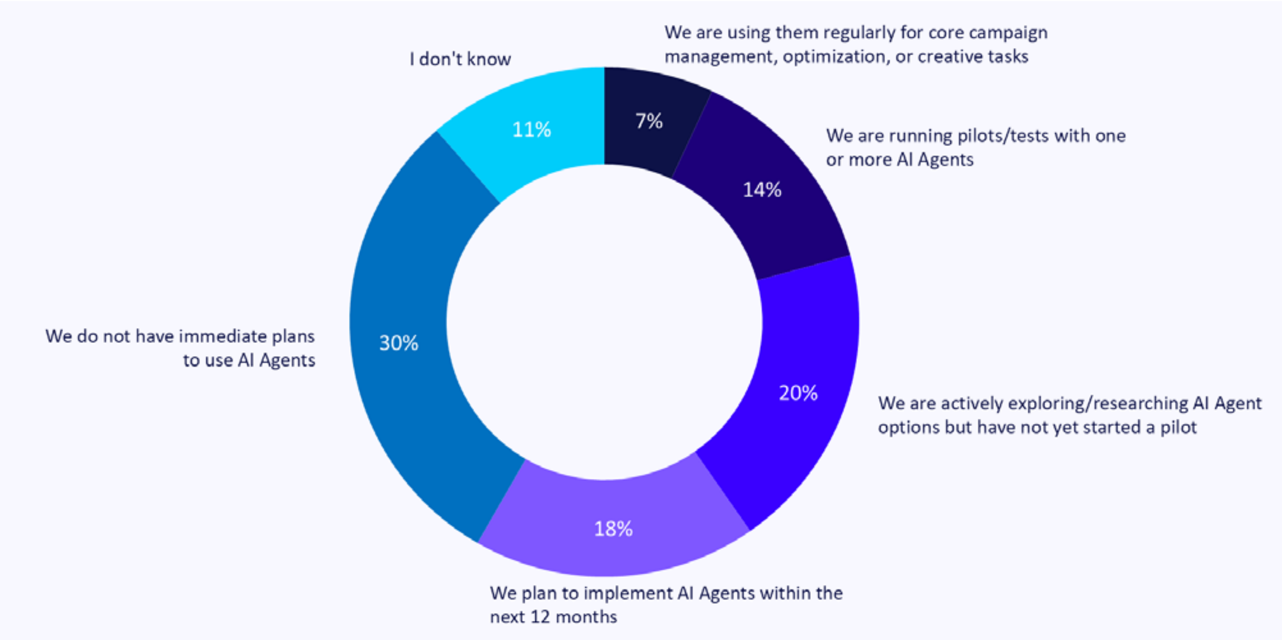
Nearly half of respondents are neutral. With 27% believing AI is likely to negatively affect PPC hiring in the next 12 months, outweighing just 15% who consider it more unlikely.

This very much feels like a 'wait and see' environment for hiring and not the fear-mongering 'mass layoffs' that have been touted.

AI has huge potential to reshape the world, but it hasn't yet translated into immediate hiring cuts. More likely, we'll see slower hiring, higher skill expectations, and consolidation of lower-value roles — rather than dramatic reductions overnight.

The seats aren't disappearing, but they are getting harder to qualify for.

8.8 Adoption of AI agents



Question asked	Are you using AI agents (e g , AutoGPT, CrewAI, LangChain / LangGraph, MultiOn, Agent mode in ChatGPT) to automate PPC tasks — beyond simple prompting?
Who did we ask?	Everyone except advertisers hiring an agency
# of respondents	1,223
Over-indexing segment(s)	40% of respondents from North America do not have immediate plans to use AI agents 42% of in-house teams do not have immediate plans to use AI agents 28% of respondents managing more than $3M/mo are running pilots with one or more AI agents

Despite the enormous media hype surrounding AI development, adoption of AI agents in PPC remains limited. **Only 21% of professionals are actively using or testing** them, while 30% have no immediate plans to adopt. Adoption intent is even lower among in-house teams, where 42% report no planned usage in the short term.

At the same time, momentum is building at higher spend levels, with 28% of respondents managing over $3M/mo running pilots with AI agents. This likely reflects scale advantages: bigger budgets amplify the upside of performance gains, and greater operational complexity increases the demand for automation. Still, adoption is expanding beyond top spenders, with 38% of respondents currently planning implementation.

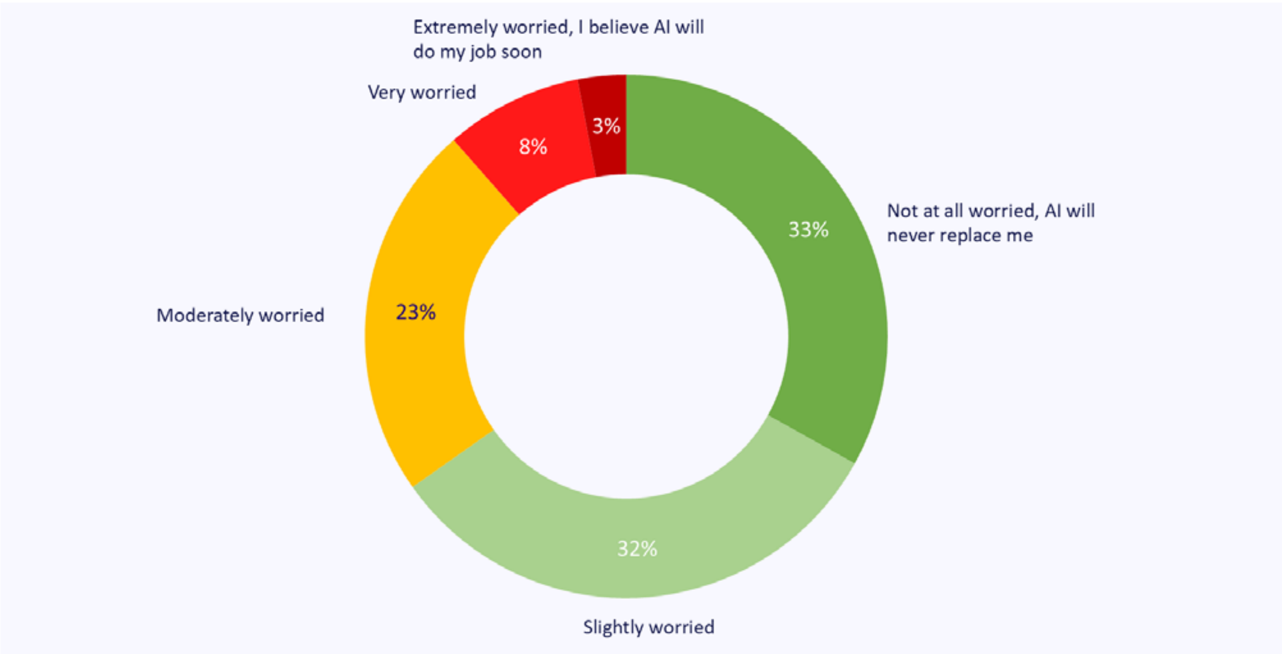
In North America, 40% of PPC specialists have no plans to adopt AI agents in the short term, versus just 23% in Europe. That's a rare reversal of the usual tech adoption pattern, and we'll be honest: we don't know why. If you have a theory, we'd love to hear it.

"While adoption of AI in Agencies has been gradual, digital marketers can no longer afford to stay on the sidelines. To remain competitive and relevant, they must master the AI wave across their entire workflow; streamlining campaign creation, management, and reporting.

The added value of the human brain in creativity, reasoning and discussing and optimizing results, supported by AI generated summaries like we facilitate in Swydo, is more important than ever."

Jeroen Maljers, Founder & CEO at Swydo

8.9 Concerns about AI replacing your job



Question asked	How worried are you about AI replacing your job?
Who did we ask?	Everyone
# of respondents	1,306

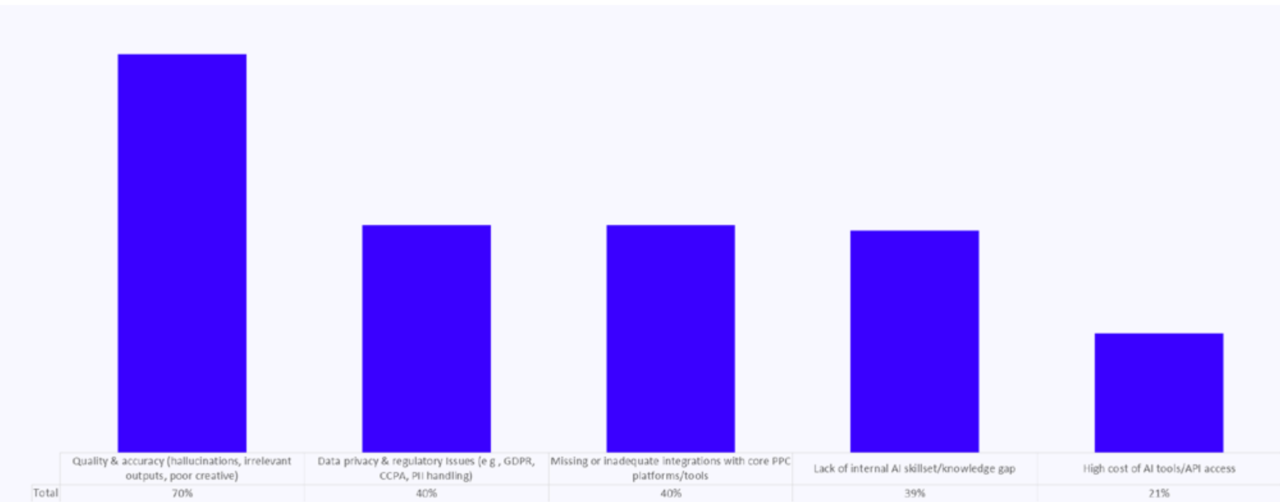
Despite the rapid expansion of AI capabilities, concern about job replacement remains low among PPC professionals. Only a small minority reports being worried that AI will replace their role, while the majority express either mild concern or none at all.

The low level of concern also reflects lived experience. As shown elsewhere in this chapter, AI is primarily being used to assist with execution and analysis, not to independently run campaigns end-to-end. Far from feeling displaced, many practitioners seem to view AI as a tool that raises the bar for the role rather than eliminating it.

In this sense, optimism about job security is less about complacency and more about realism. PPC roles are changing, but they are not disappearing.

> *AI won't replace you. But someone who knows how to use AI better than you might. The rapid rise of AI in meetings shows what's really happening: marketers aren't being removed from the room.*
>
> *They're being freed to think, while AI takes the notes, surfaces insights, and soon agents will execute the tasks.*
>
> **Frederick Vallaeys, co-founder & CEO at Optmyzr**

8.10 Biggest challenges when using AI and automation for PPC



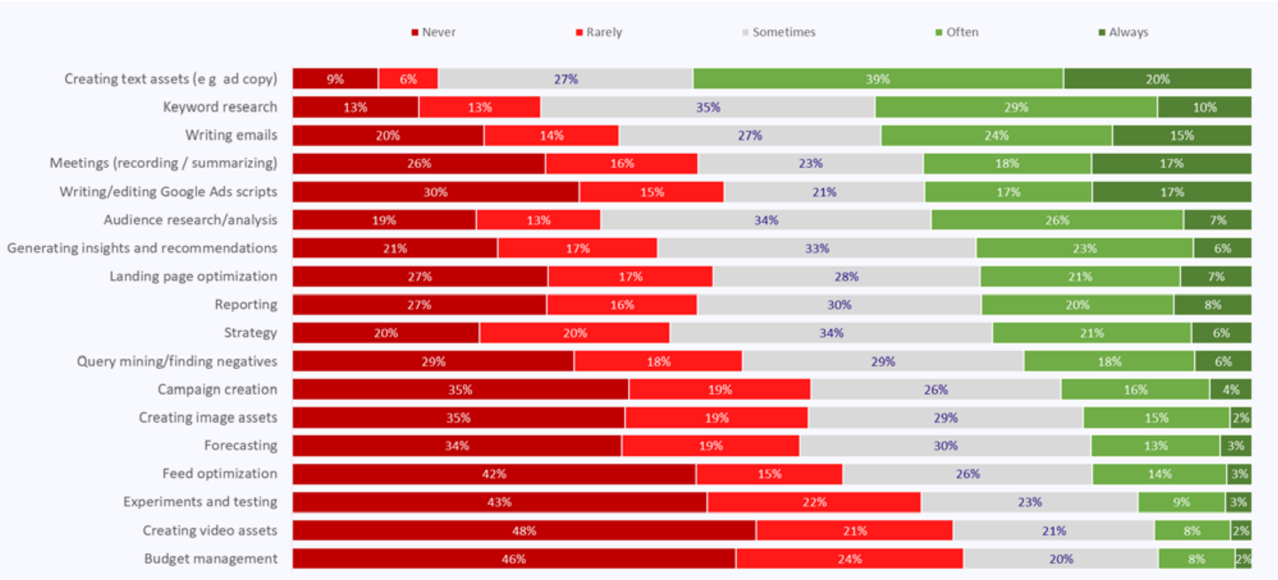
Question asked	What are the biggest challenges your team currently faces when using AI and automation to run PPC campaigns? Select 1 to 3 options
Who did we ask?	Everyone except advertisers hiring an agency
# of respondents	1,223

While AI adoption is increasing, quality and accuracy emerge as the single biggest challenges PPC teams face when using AI and automation. Concerns about reliability, correctness, and trust consistently outweigh concerns about access, privacy, or tooling.

In 2026, the question is whether AI outputs can be trusted without extensive human review.

The data suggests that PPC professionals are not struggling to adopt AI, they are struggling to operationalize it safely. Until AI outputs become more predictable, explainable, and verifiable, human oversight remains not just valuable, but essential.

8.11 Adoption of LLMs for PPC activities



Question asked	How often do you use LLMs for the following activities?
Who did we ask?	Individual contributors and freelancers
# of respondents	656

Large Language Models (LLMs) are now firmly embedded in PPC workflows with increased adoption across the board. However, there is a wide range in adoption depending on tasks, ranging from 10% for budget management to 59% for ad copy.

The most common applications have all seen significant adoption gains:

- writing ad copy (increased from 42% to 59%)
- keyword research (increased from 27% to 39%)
- email drafting (increased from 27% to 39%)
- summarizing meetings (increased from 9% to 35%)
- writing or editing scripts (increased from 23% to 34%)
- and audience research. (increased from 19% to 33%)

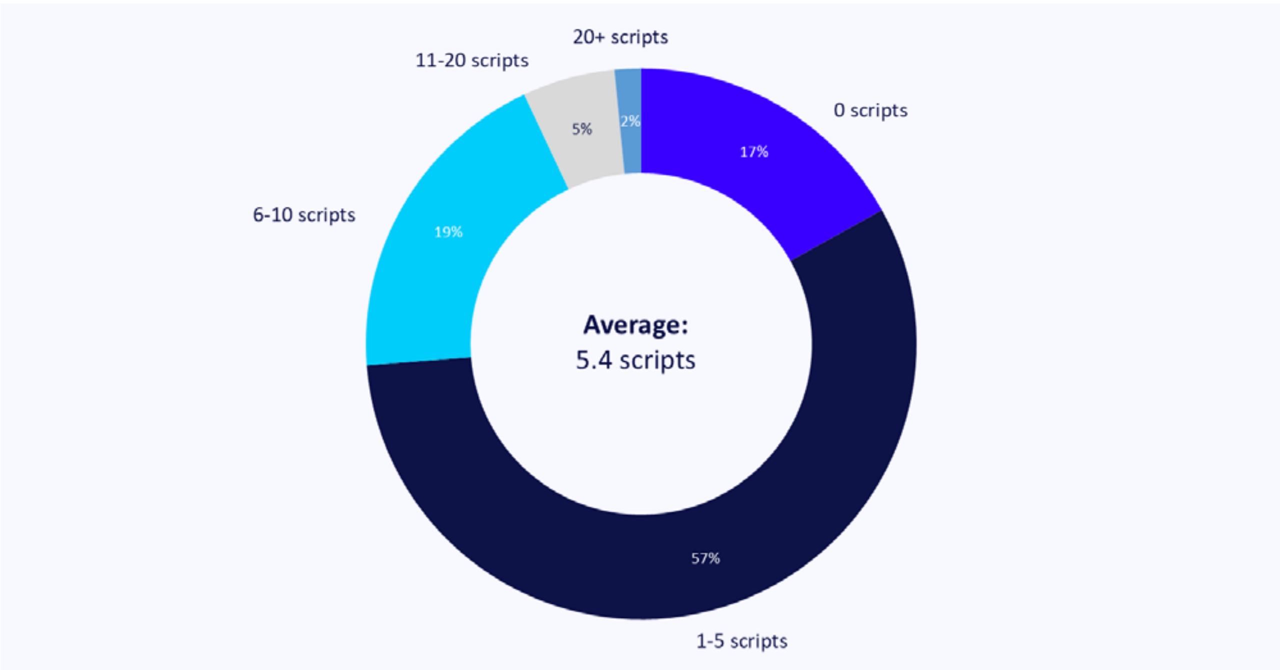
These are areas where LLMs excel: language-driven tasks with clear inputs and relatively low downside risk. In contrast, adoption drops sharply for activities such as **budgeting, forecasting**, and **strategic decision-making**, where errors are harder to detect and consequences are greater. It also remains lower for creating campaigns or creating visual assets, areas where AI has only more recently started to show promise and deliver usable results.

9. Scripts and software

The PPC tooling landscape is massive. There are hundreds of scripts and over 250 software solutions across dozens of categories, from bid management and feed optimization to reporting, click fraud, and budget pacing.

This chapter covers the tool categories most commonly used by PPC professionals, based on what our respondents told us. For a full, interactive overview of (almost) every category and solution out there, visit ppc.software.

9.1 Number of scripts running in each Google Ads account



Question asked	On average, how many scripts do you have running in each Google Ads account?
Who did we ask?	Individual contributors and freelancers who manage Google campaigns
# of respondents	644

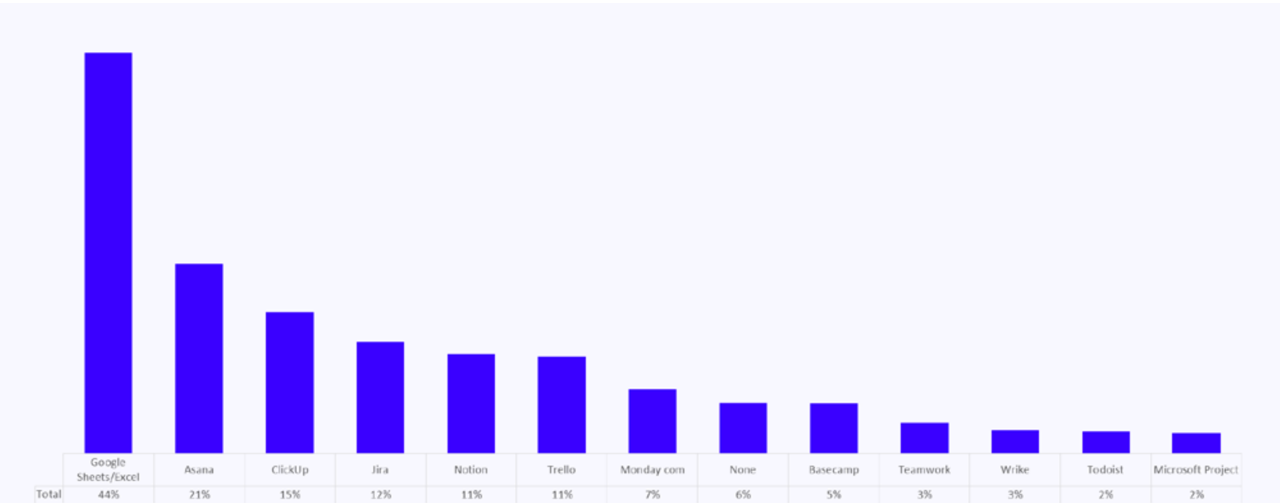
Scripts remain a staple of PPC management, with most professionals running between one and five per Google Ads account. That distribution hasn't changed much since our 2024 report, but the weighted average has, rising from 3.8 scripts per account to 5.4.

The preference for a small number of scripts likely reflects practical considerations rather than a lack of capability. Scripts require ongoing maintenance, monitoring, and trust. Each additional script introduces not just potential efficiency gains, but also operational risk. As a result, PPC professionals appear to favor a few high-impact scripts over broad, complex automation layers.

This restrained approach also aligns with findings elsewhere in the report. As AI tools and platform-side automation become more prevalent, scripts increasingly occupy a supporting role, filling visibility gaps, enforcing safeguards, or handling narrowly defined tasks that are difficult to achieve through native features alone.

It appears most PPC teams have identified a core set of scripting use cases that reliably add value, and have largely stopped there.

9.2 Project/task management solutions



Question asked	Which solution do you use for (most) project/task management? Select 1 or 2 solutions.
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	23% of respondents from North America use ClickUp 20% of in-house teams use Jira 61% of respondents managing <$5K/mo use Google Sheets/Excel 16% of independent agencies with > 100 employees use Wrike

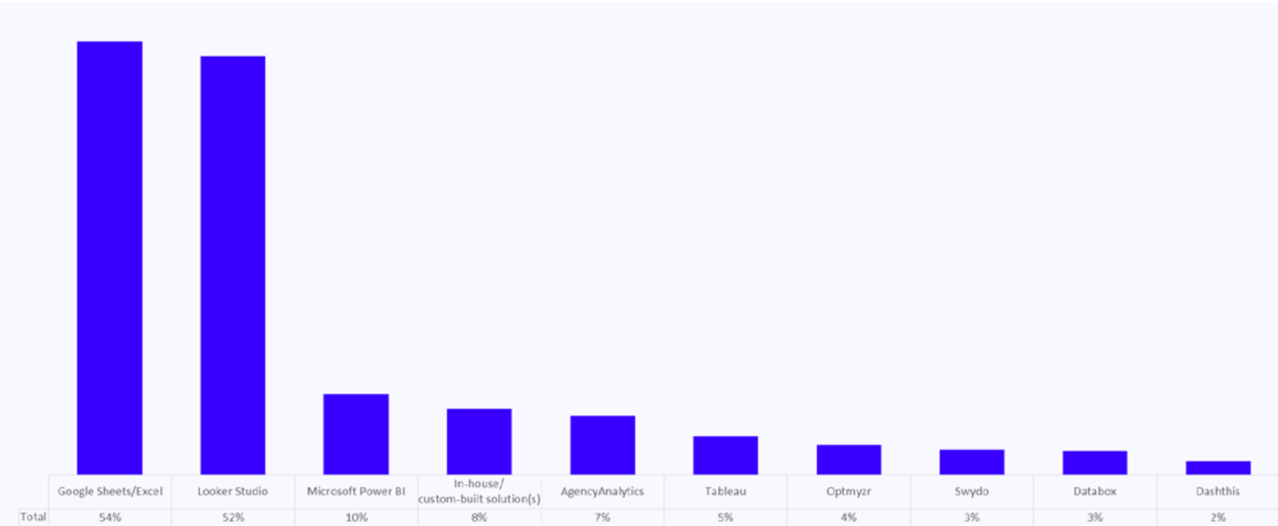
Overall, the most popular tool for project/task management is a surprising one, because it isn't an actual project management tool. **44% of respondents selected Google Sheets/Excel.**

And when we look at the responses based upon PPC spend, that number jumps to 61% for those managing less than $5K per month.

Agencies rely on project management tools more than in-house teams, particularly specialized tools. One significant exception was Jira, with usage of 20% for in-house teams, double that of agencies.

While these tools are not performance drivers, they are essential for managing workload, timelines, and cross-team coordination. This is particularly important when managing multiple clients and stakeholders, as well as more complex campaigns.

9.3 Reporting/data visualization solutions



Question asked	Which solution do you use for (most) reporting/data visualization? Select 1 or 2 solutions.
Who did we ask?	Everyone
# of respondents	1,306
Full disclosure	Optmyzr and Swydo are partners in this survey, so the results may be skewed in their favor.
Over-indexing segment(s)	16% if in-house teams use Microsoft Power BI 12% of in-house teams use Tableau 16% of respondents managing >$3M/mo use Tableau 7% of agencies with < 25 employees use Swydo

Reporting and visualization tools are consistently ranked as mission-critical, reinforcing how central clear, reliable reporting is to PPC success, both for internal decision-making and external communication.

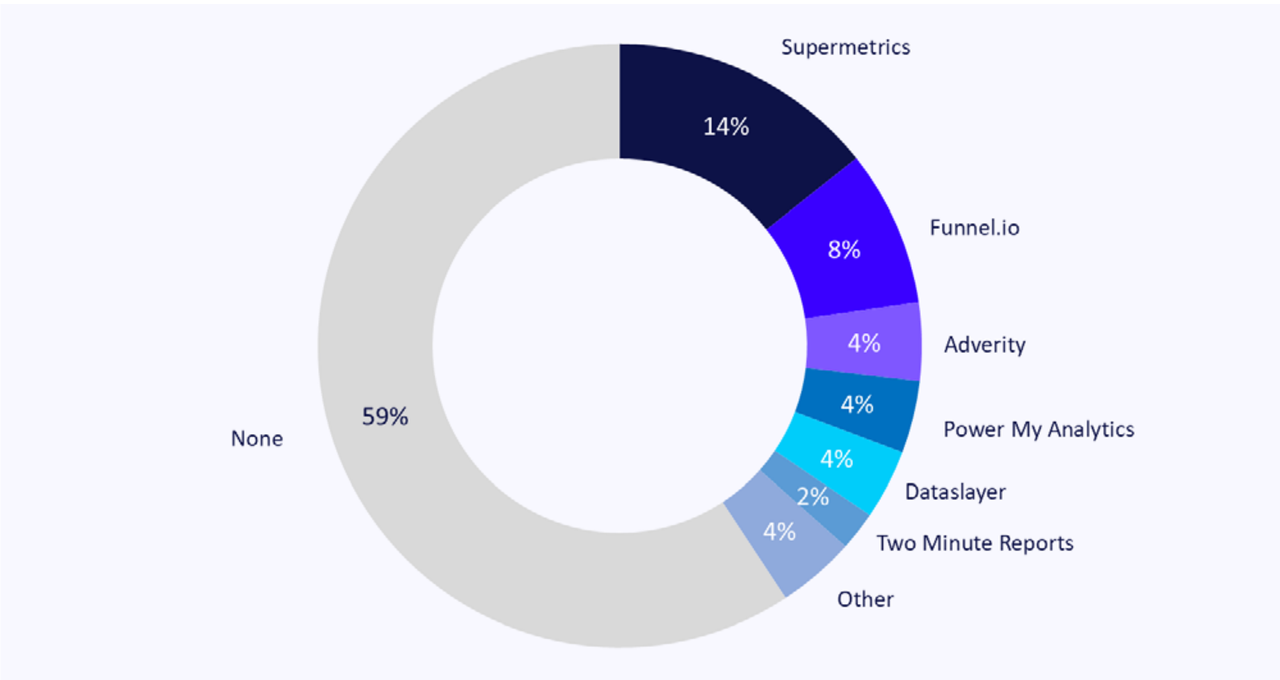
For many respondents, the default reporting stack is free. Google Sheets/Excel and Looker Studio each topped 50% of respondents, and half of those using one also use the other.

Combining one of these free solutions with a paid solution is quite rare: up to 8% of respondents do this (depending on the paid solution)

Business Intelligence tools (like Microsoft BI and Tableau) and Marketing Analytics tools (AgencyAnalytics, Optmyzr, Swydo) are still represented at about the same rates as two years ago.

In-house teams and respondents managing $3M + are more likely to rely on advanced solutions like Tableau and Microsoft Power BI, while small agencies are more likely to use Swydo.

9.4 Marketing data pipeline (ETL) solutions



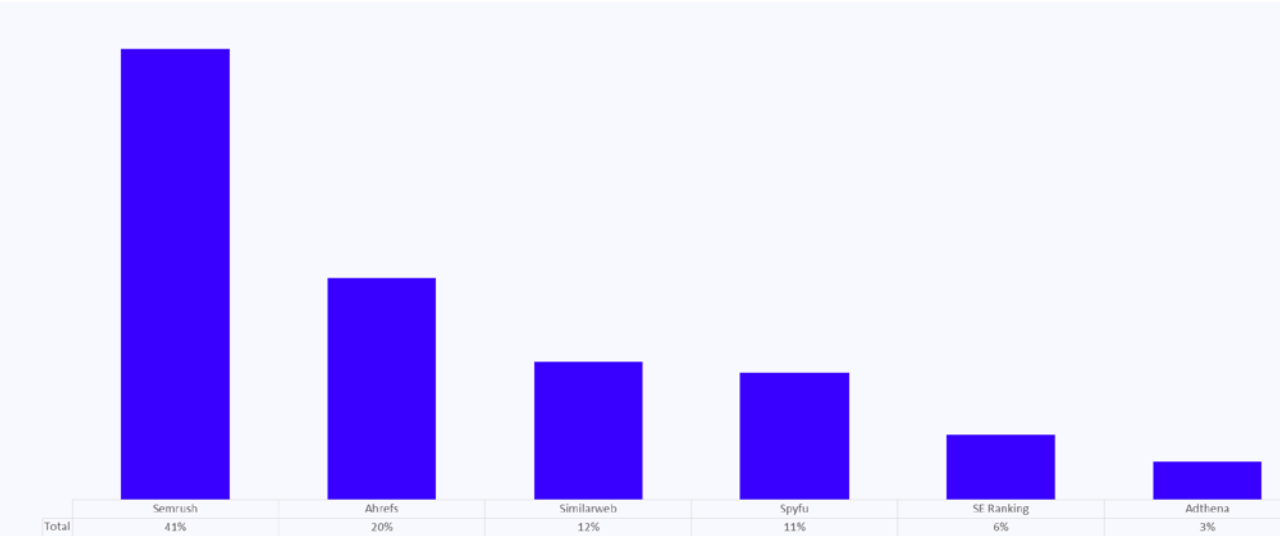
Question asked	Which solution do you use as marketing data pipeline (ETL)?
Who did we ask?	Individual contributors and freelancers
# of respondents	670

Data pipeline tools are often confused with reporting tools, but they serve a different role. These ETL (extract, transform, load) solutions collect marketing data from multiple sources and prepare it for reporting and analysis.

Rather than being user-facing platforms, data pipeline tools operate behind the scenes. They act as middleware, moving data between systems so it can be visualized and used for insights.

Less than half of respondents report using an ELT solution, but among those who do, Supermetrics leads with 14%, followed by Funnel.io.

9.5 Competitive intelligence solutions



Question asked	Which paid solution(s) do you use for (most) competitive intelligence? You can select up to 2 solutions
Who did we ask?	Individual contributors and freelancers managing campaigns on Google
# of respondents	644
Over-indexing segment(s)	22% of respondents in North America use Spyfu 8% of respondents from the UK & Ireland use BrandVerity
Under-indexing segment(s)	5% of respondents in Continental Europe use Spyfu

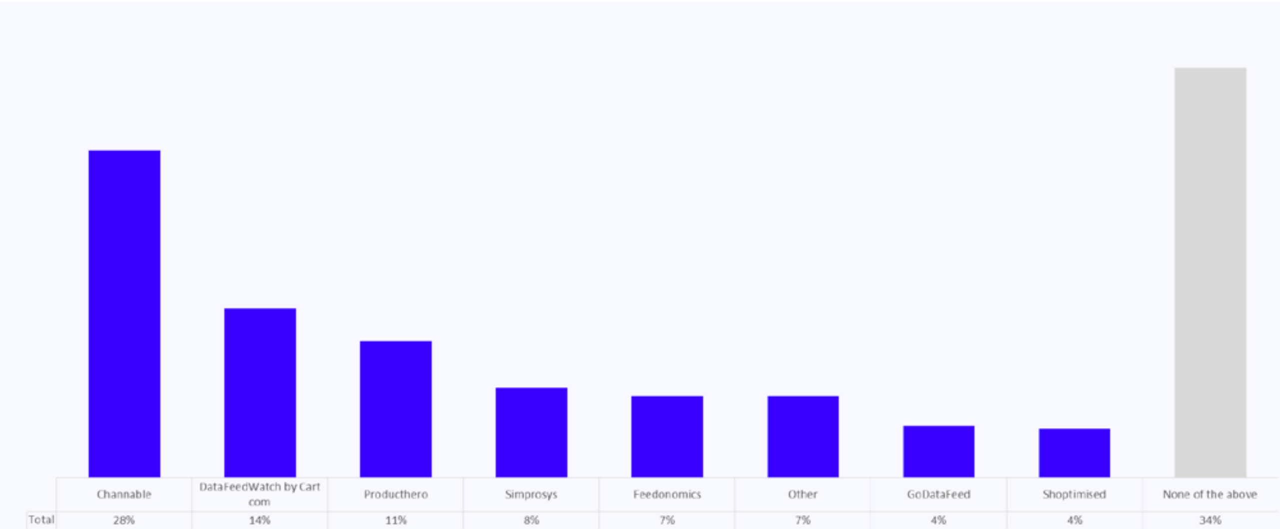
Over 40% of individual contributors and freelancers that use paid competitive intelligence tools use Semrush, with Ahrefs as the second most popular tool. And many respondents use more than one tool. For example, 21% of Semrush users also use Ahrefs, and 42% of Ahrefs users also use Semrush.

Spyfu is much more popular in North America (22%) than in Continental Europe (5%).

Please note that **32% reported using none of these paid solutions**. They probably rely entirely on free solutions from ad platforms, such as Auction Insights and various ad libraries.

9.6 Feed management

9.6.1 Feed management solutions



Question asked	Which feed management/optimization solution do you use (primarily)? Select 1 or 2 solutions
Who did we ask?	Individual contributors and freelancers who manage Google Shopping campaigns
# of respondents	436
Full disclosure	DataFeedWatch by Cart.com and Producthero by Channable are partners in this survey, so the results may be skewed in their favor.
Over-indexing segment(s)	44% of respondents from Continental Europe use Channable 20% of respondents from North America use Feedonomics 26% of respondents from the UK & Ireland use Shoptimised

We only asked this question to specialists managing Google Shopping campaigns, and still, a third don't use any feed management tool.

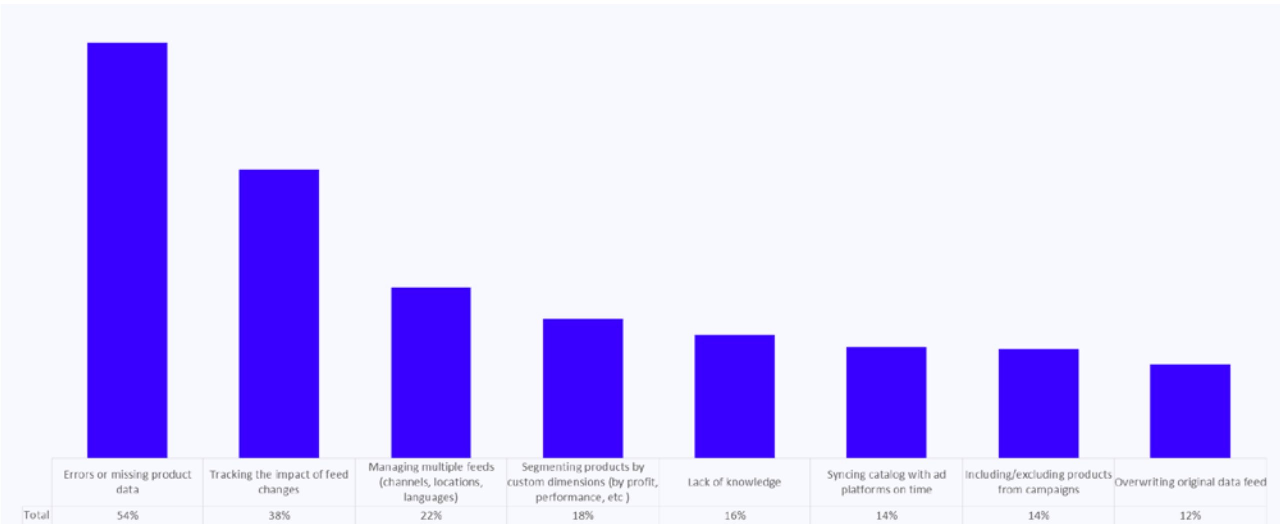
Bias disclosure: some of the partners sell exactly these tools. But here's the thing. In the next paragraph, you'll see that 54% of this same group said feed errors and missing data are their biggest challenge. If you're in both groups (no tool, lots of errors and missing data), the connection isn't hard to make.

"With the rise of AI, it's even more important to have a great product feed in order to match the context of consumers. While this used to be a time consuming task, luckily, many feed management solutions, such as Channable and Producthero, have integrated AI into their platforms to make it easier to quickly list products and optimize the quality of your product content.

This enables PPC specialists to focus on the more strategic part of their job, such as analyzing and creating segments based on profit data or return rates, and improving the creatives of their advertisements using the performance data across platforms."

Mark Grasmayer, Product Marketing Lead at Channable

9.6.2 Feed management challenges



Question asked	What are the biggest challenges you face in managing your product feeds? Select 1 to 3 challenges.
Who did we ask?	Individual contributors and freelancers who manage Google Shopping campaigns.
# of respondents	436

The top challenge in product feed management remains errors and missing data, reported by over half of respondents, followed by difficulty measuring the impact of feed changes. Surprisingly, both issues have grown since two years ago, despite wider adoption of feed management tools (non-users dropped from 40% to 34% over the same period).

Challenges also vary by environment: agencies and freelancers face the most data-quality issues, likely due to limited access to client data, while in-house teams mainly struggle with figuring out how to tie performance shifts to feed changes.

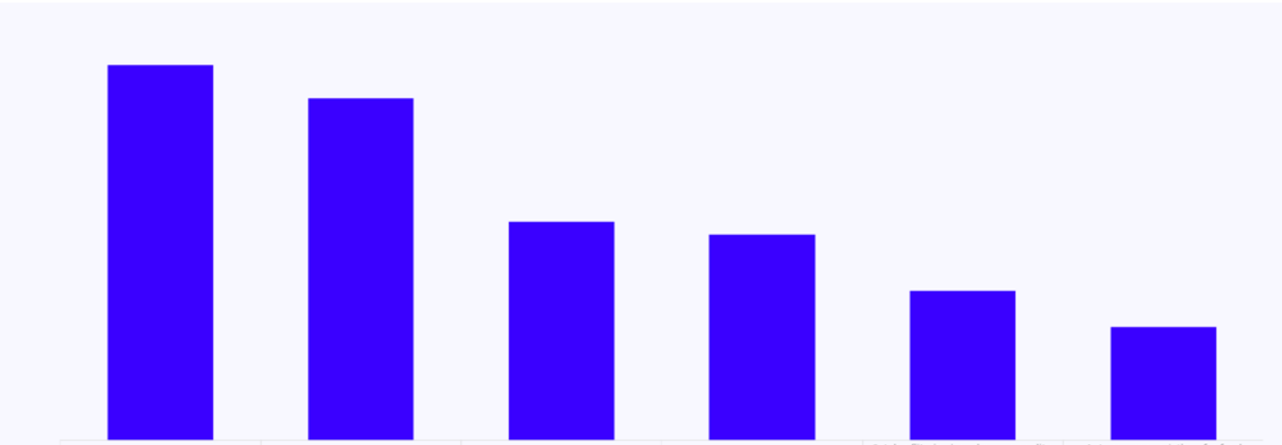
"The majority of respondents (54%) struggle with data errors when managing product feeds. To me, it highlights a growing divide between advertisers who will be ready for AI-driven campaigns and those who won't.

Fixing feed errors is the foundation of feed optimization and enables more strategic data enhancements. AI-driven algorithms - such as those in Google's AI Mode - are moving beyond compliance checks and keyword matching toward LLMs that identify the best product for a user's conversational query.

My advice? If you want to compete in that environment, build a solid strategy for filling missing data and resolving persistent feed errors, whether through internal processes or robust feed tools such as DataFeedWatch. That groundwork will pave the way to experiment and adapt your feeds for an agentic commerce future."

Monica Axinte, SVP Marketing and Strategy at DataFeedWatch by Cart.com

9.6.3 Feed optimization automation wish list



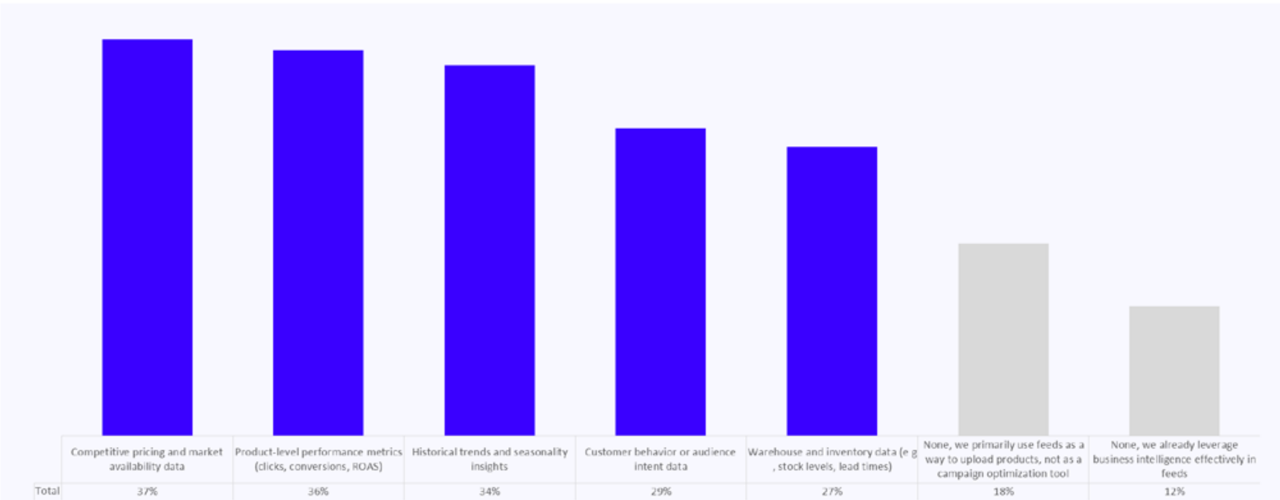
	Identifying and auto-fixing feed errors	Product attribute optimization	Performance-based feed rules	Image optimization and enhancement	Catalog filtering based on seasonality, stock levels, or trends	Auto-recommendations for feed opportunities per platform
Total	50%	46%	29%	27%	20%	15%

Question asked	Which parts of feed optimization do you wish were more automated? Select 1 to 3 areas.
Who did we ask?	Respondents who indicated they use a feed management/optimization platform
# of respondents	291

While the 2024 PPC report revealed that AI-driven automation was the most desired among marketers in feed management, this year's report breaks down which areas marketers see the most value in automating.

Half of survey respondents believes identifying and fixing feed errors should be more automated and nearly as many prioritize automated optimization of product attributes, i.e., titles or descriptions. Performance-based feed rules, such as applying custom labels based on ROAS, rank third. Together, these responses highlight a clear expectation: feed management tools should move beyond manual corrections and enable more intelligent, rule-based optimization.

9.6.4 Leverage of business intelligence in product feeds wish list

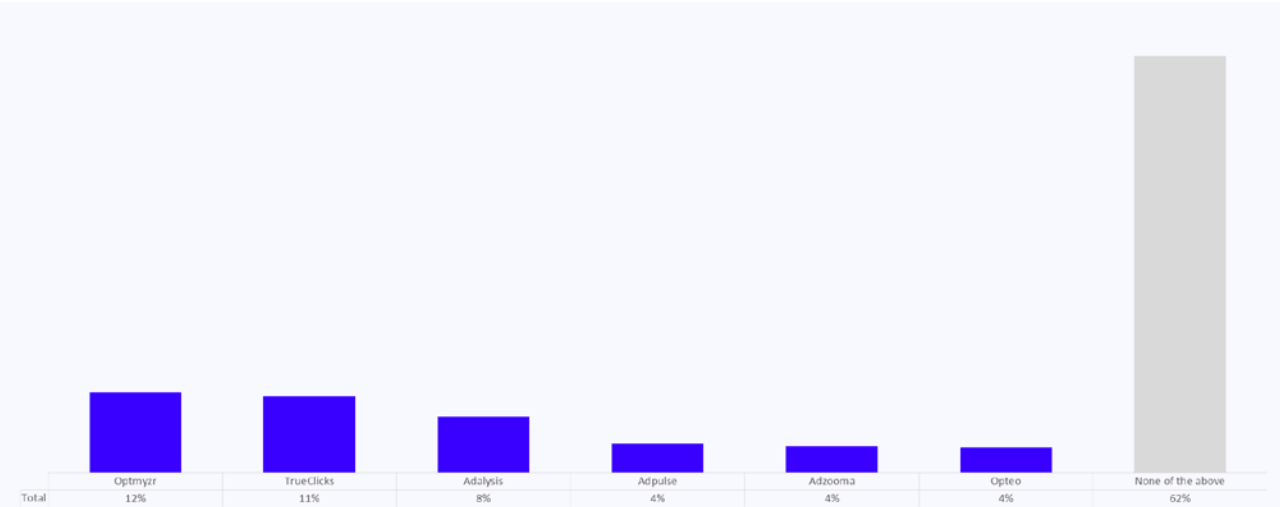


Question asked	What types of business intelligence would you like to leverage more through your product feeds? Select all that apply.
Who did we ask?	Respondents who indicated they use a feed management/optimization platform
# of respondents	291

Just 12% feel they're using business intelligence effectively in their feeds. That leaves a lot of room to grow. The top three things practitioners want? Competitive pricing and market availability data, product-level performance, and historical trends and seasonality.

The first one is squarely in the territory of feed management solutions, so it's worth checking with yours whether this data is available to you. The other two usually exist somewhere in the organization already. The challenge is getting that data into the feed.

9.7 Solutions for analysis, monitoring and optimization



Question asked	Which paid solution(s) do you use for analysis, monitoring and optimization? Select 1 or 2 answers.
Who did we ask?	Individual contributors and freelancers who manage Google campaigns.
# of respondents	644
Full disclosure	Optmyzr and TrueClicks are partners in this survey, so the results may be skewed in their favor.
Over-indexing segment(s)	77% of in-house teams use none of these solutions

As we saw earlier in this report, paid search practitioners use an average of 5.4 scripts per Google Ads account, barely scratching the surface of what scripts can do. We also saw that 59% use the Google Ads Editor regularly.

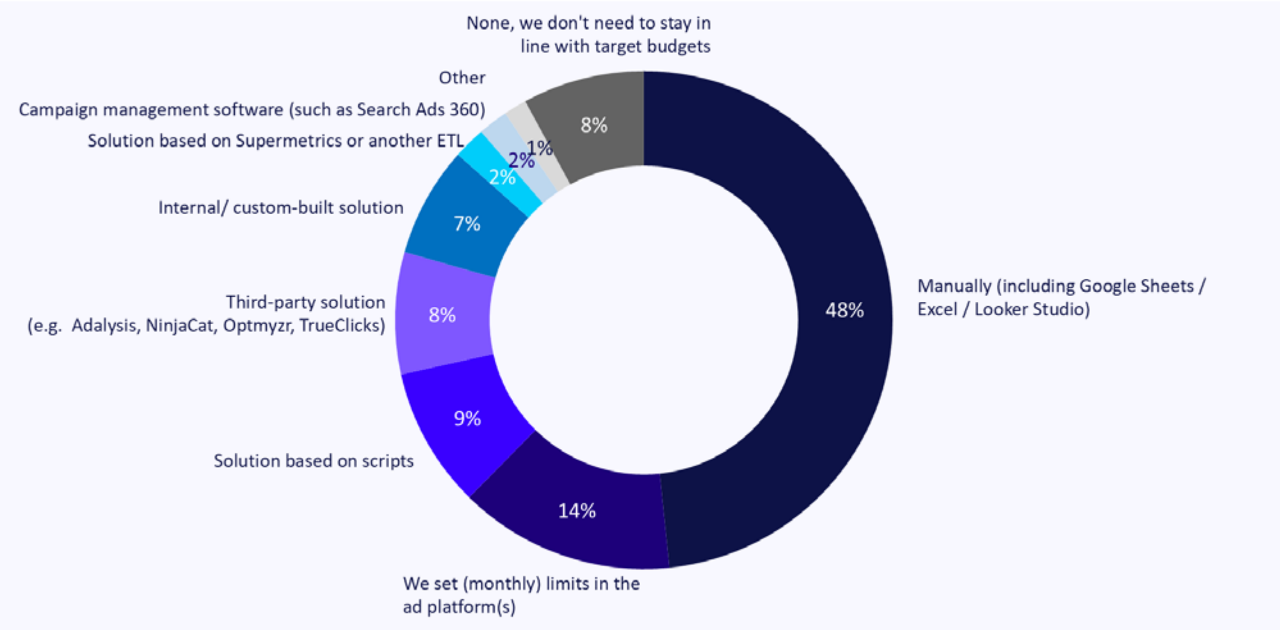
And for most of our respondents, that's it. 62% don't use any paid PPC management tools, meaning their entire analysis, monitoring, and optimization stack begins and ends with what Google gives them for free.

Given that Optmyzr and TrueClicks are partners in this survey - likely overrepresenting tool users - that number would probably be even higher in the broader PPC population.

We'll admit our bias here, but relying solely on the Ads UI, a few scripts, and the Editor to manage paid search campaigns likely means you're doing manual work that could be automated. More scripts or a third-party solution, such as those listed above, can close that gap.

LLMs have their place, but much of PPC runs on consistency: same inputs, same outputs, every time. For that kind of rule-based monitoring and automation, you want something deterministic running quietly and reliably behind the scenes.

9.8 Budget management solutions



Question asked	How do you track if you're staying in line with your (clients') PPC target budget?
Who did we ask?	Individual contributors and freelancers.
# of respondents	670
Full disclosure	Optmyzr and TrueClicks are partners in this survey, so the results may be skewed in their favor.

Setting budget expectations and delivering upon them is essential to maintaining client (or management) trust and satisfaction while delivering consistent results.

Half of the respondents track paid search budgets manually (including the use of Google Sheets, Excel, or Looker Studio to facilitate).

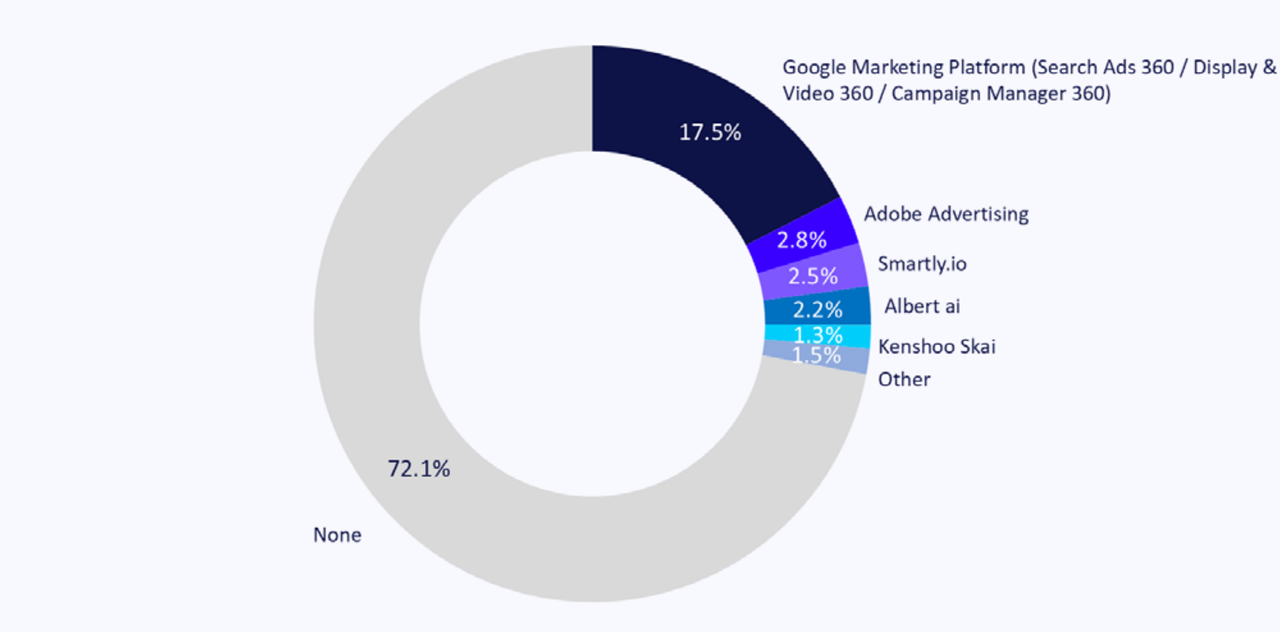
Another 14% of respondents set monthly limits on ad platforms. Other solutions mentioned include:

- Third-party solutions such as Adalysis, Optmyzr, or TrueClicks.
- Scripts or campaign management software.
- Internal/custom-based solution.

The higher the PPC spend, the more likely respondents were to adopt external budget-tracking tools, reflecting the increased risk and complexity of managing larger budgets.

8% of respondents are lucky enough to have "overthrown the tyranny of paid search budgets" as George Michie would call it. Their only constraint is efficiency. Spend is a result, not a limit.

9.9 Multi-channel campaign management solutions

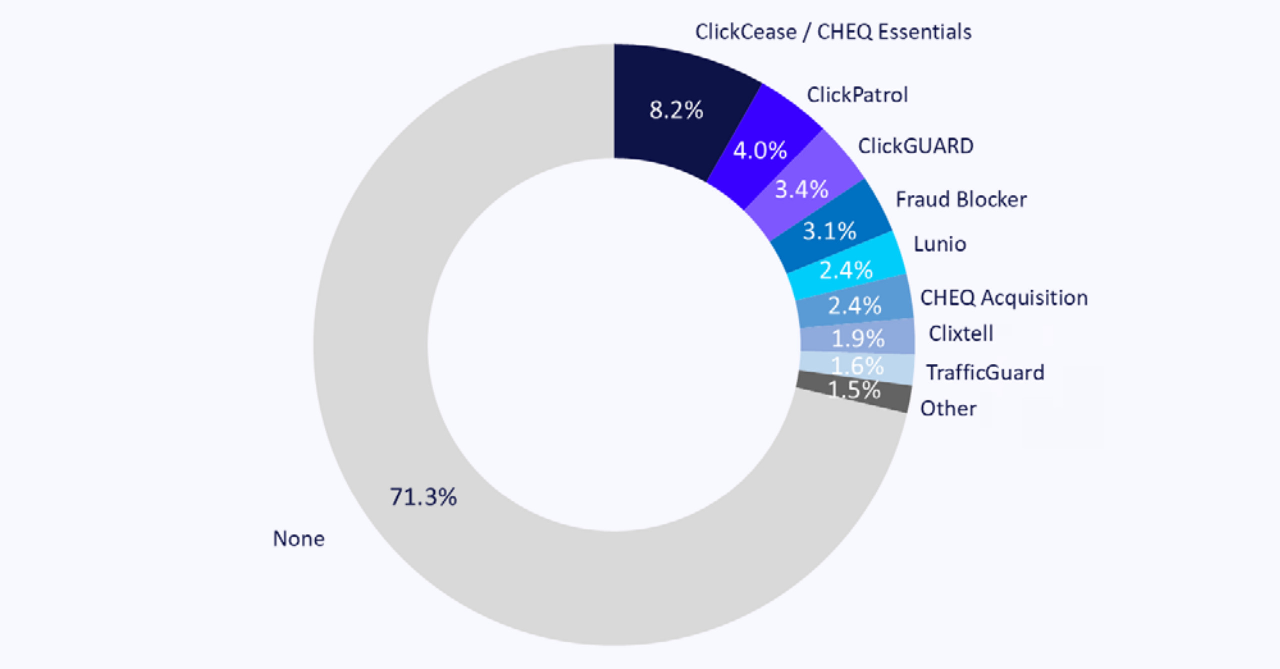


Question asked	Which solution do you use (most often) for multi-channel campaign management?
Who did we ask?	Individual contributors and freelancers
# of respondents	670

Multi-channel management tools are used by just 28% of respondents, but that's up from where it was. Two years ago it was 23%, and that included Marin Software, which shut down in 2025. The category didn't just absorb the loss, it grew through it.

The real barrier isn't awareness or desire. It's that most PPC teams can't justify the cost until they manage enough spend across enough channels for the efficiency gains to pay for themselves. Below that threshold, spreadsheets and platform-native tools win on price. This would explain why adoption has barely moved despite the tools getting better.

9.10 Click fraud solutions



Question asked	Which solution do you use to prevent click fraud, if any?
Who did we ask?	Individual contributors and freelancers
# of respondents	670
Over-indexing segment(s)	29% of respondents for South & Southeast Asia use ClickCease/CHEQ Essentials 8% of respondents from the UK & Ireland use Lunio

The number of respondents that don't use any click fraud solution has slightly increased compared to 2024 from 68% to 71% this year.

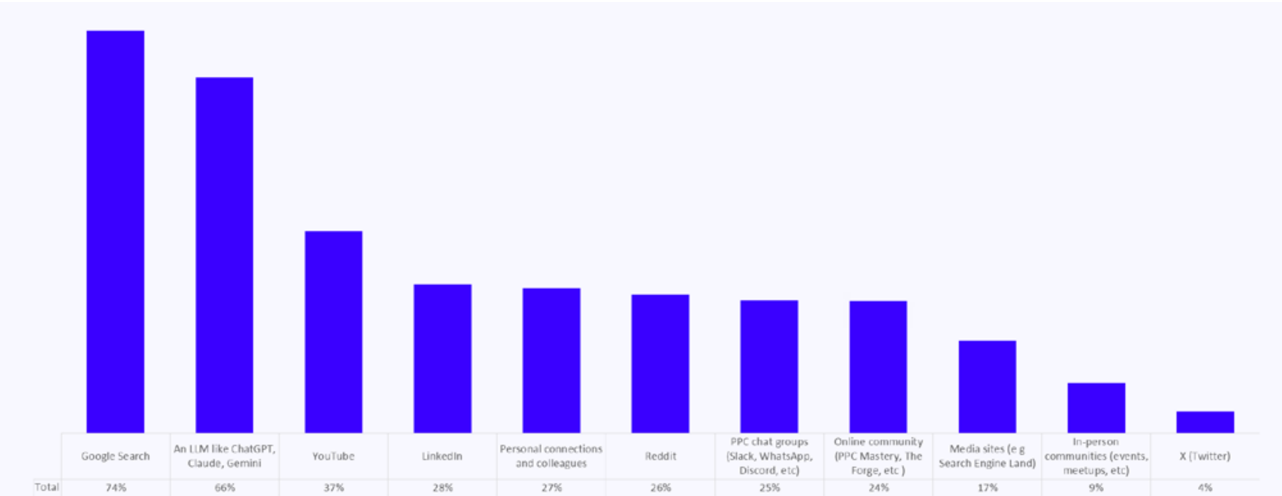
Usage of most click fraud tools declined compared to 2024. The exception is ClickPatrol, a newcomer that captured 4% of respondents.

We saw the following significant outliers based on geography:

- ClickCease/CHEQ Essentials is most popular in South & Southeast Asia (29%)
- Lunio is most popular in the UK & Ireland (8%)

10. PPC communities, events, and resources

10.1 Most popular resources



Question asked	When faced with a PPC-related query or challenge, where do you typically go for answers? Select all that apply.
Who did we ask?	Individual contributors and freelancers
# of respondents	670
Over-indexing segment(s)	38% of respondents from North America use Reddit 63% of respondents from South & Southeast Asia use online communities 52% of respondents managing >$3M/mo use personal connections and colleagues

Search is still king…

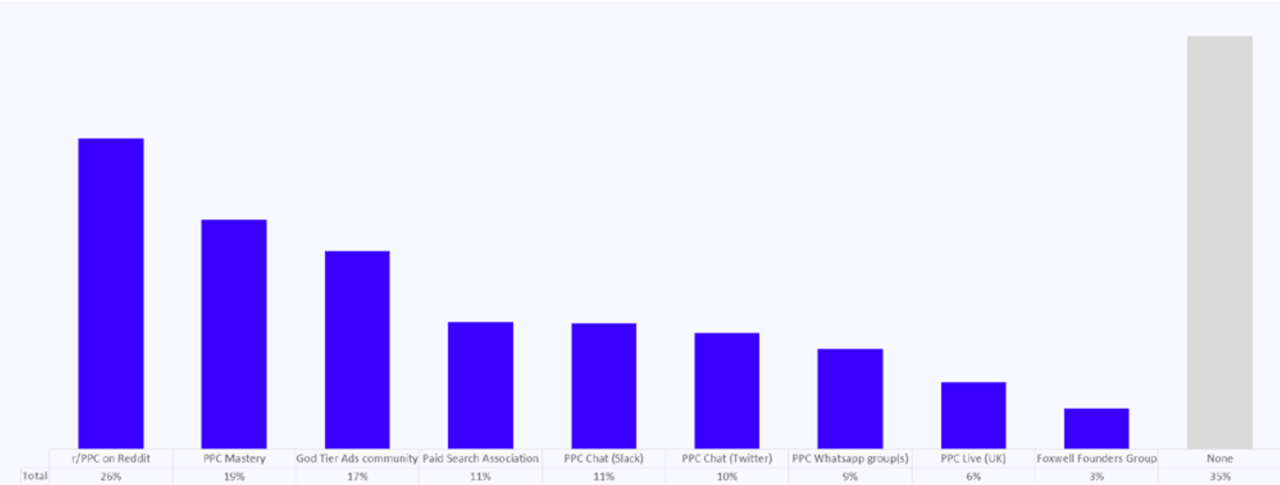
But 66% now also use an LLM. That's an enormous shift from Google, not to socials, but to synthesized answers.

But that introduces a new risk: confidence without verification.

YouTube remains strong for perceived depth. Everything else fragments into niche sources; LinkedIn, Reddit, chat groups, communities - but none of them dominate. X has lost much of its relevance as a PPC resource since its rebrand from Twitter.

The real skill now isn't just knowing where to look - it is knowing when to double-check what you're told.

10.2 Most popular communities



Question asked	Which of the following PPC communities are you part of/following? Select all that apply.
Who did we ask?	Individual contributors and freelancers
# of respondents	670
Full disclosure	God Tier Ads is a partner in this survey, so the results may be skewed in its favor.
Over-indexing segment(s)	21% of respondents from the UK & Ireland join PPC Live (UK)
Under-indexing segment(s)	1% of respondents from North America are in PPC WhatsApp groups 6% of respondents from North America are in PPC Mastery

35% of respondents don't belong to any PPC community. That's up from 31% two years ago, and worth flagging. Your colleagues know your accounts. An international community of peers shows you how the rest of the industry is solving the same problems differently. Paid and free options exist for every level.

r/PPC remains the largest single space at 26%, with other communities sitting in the teens.

This suggests that the PPC landscape is fairly distributed. There isn't one central place, rather people tend to gather in smaller pockets.

For marketers, that likely means perspectives vary depending on where you spend time.

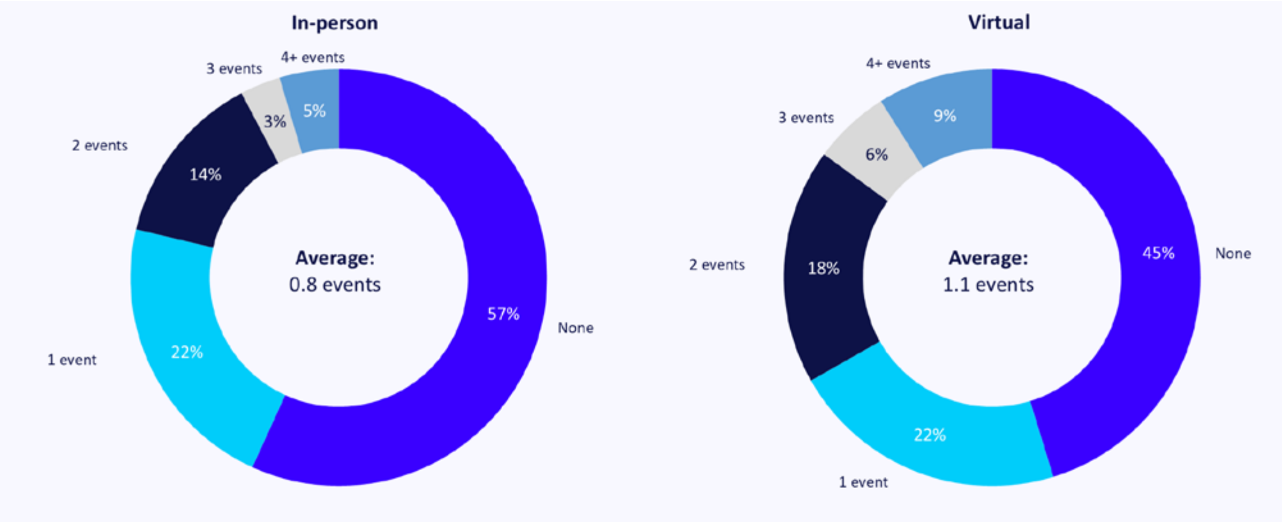
In a fast-moving industry, even a light connection to peers can help provide context beyond your own accounts.

10.3 (Search) marketing events

10.3.1 Event attendance

We asked our respondents two questions about event attendance to be able to split out in-person vs. virtual events:

- How many in-person (search) marketing events/conferences did you attend in 2025 (such as SMX, Hero Conf, BrightonSEO, Mozcon, Pubcon, Inbound, Friends of Search, ADworld Experience, etc.)?
- How many virtual (search) marketing events/conferences did you attend in 2025 (such as a virtual SMX, Ad World Conference, etc.)?



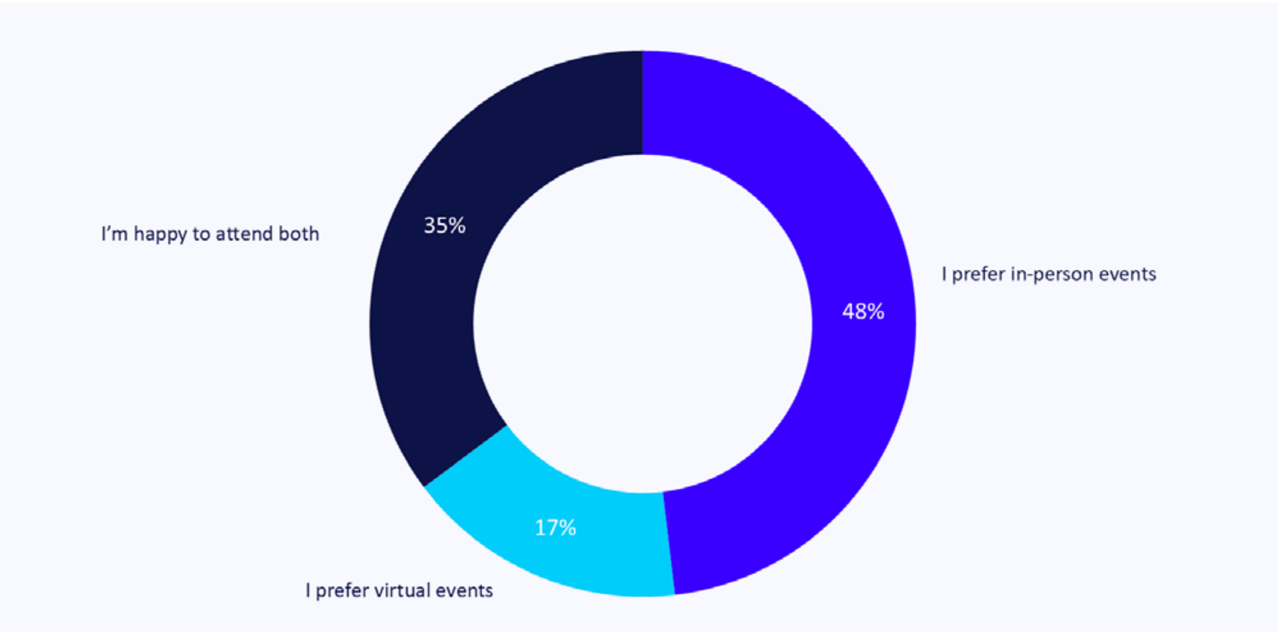
Question asked	How many (search) marketing events / conferences did you attend in 2025?
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	48% of respondents with more than 10 years of experience went to at least 1 in-person event 53% of respondents managing at least $3M went to at least 1 in-person event 62% of respondents with more than 10 years of experience joined at least 1 virtual event 64% of respondents managing at least $3M went to at least 1virtual event

Event participation among PPCers remains limited. In 2025, 57% did not attend any in-person marketing events, and 45% skipped virtual events. While still high, these results represent a slight improvement compared to two years ago (64% and 50%, respectively), suggesting a gradual rebound in event engagement.

- Event participation was notably higher among more experienced and higher-spending respondents. Among those with 10+ years of experience, 48% attended at least one in-person event and 62% joined at least one virtual event.
- Similarly, 53% of respondents managing $3M+ per month participated in at least one in-person event, while 64% attended at least one virtual event.

The takeaway isn't just that senior practitioners attend more events. It's that the people with the most experience still invest in learning, while those earlier in their careers, who arguably need it most, attend less. That gap likely reflects access more than ambition: senior practitioners are more likely to have employer-funded travel budgets and the autonomy to block time. If you manage people earlier in their career, this is a reminder to actively create that access for them.

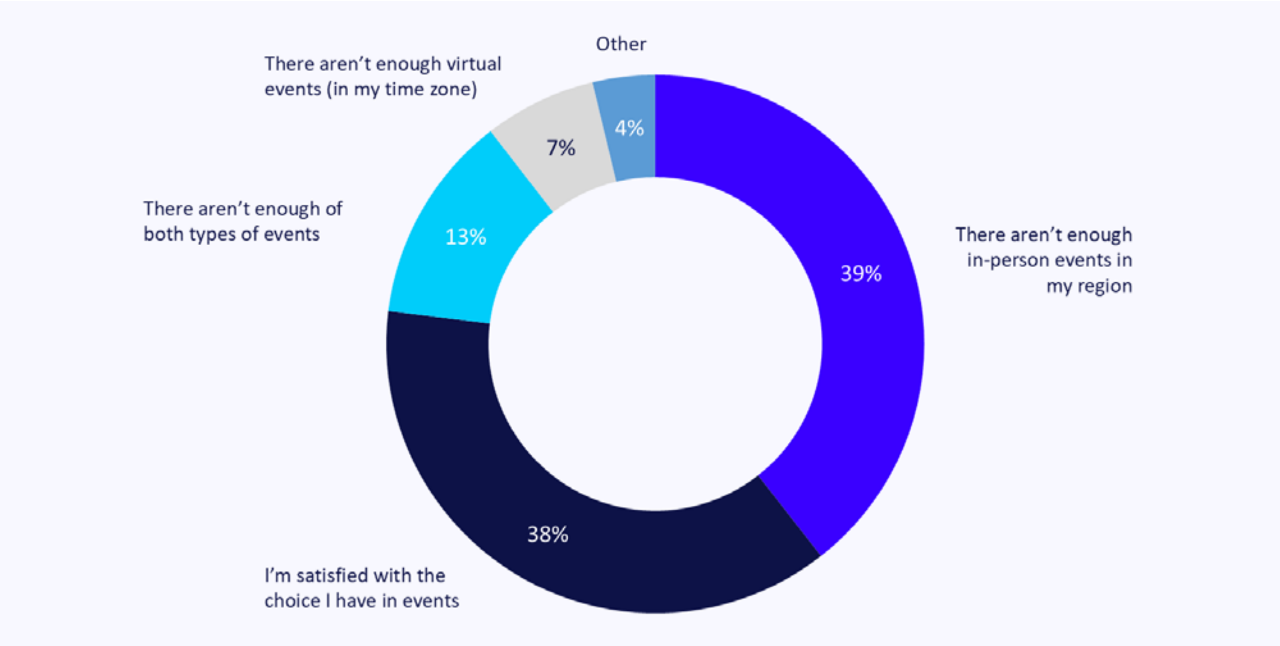
10.3.2 Event preference



Question asked	Do you prefer in-person or virtual events?
Who did we ask?	Respondents who attended both types of events.
# of respondents	426

Nearly half of respondents (48%) prefer in-person events over virtual formats, while 35% are open to participating in both. This indicates that, despite the growth of digital options, in-person experience remains highly valued within the PPC community.

10.3.3 Event availability



Question asked	Which statement applies to the availability of (search) marketing events in your region and time zone?
Who did we ask?	Everyone
# of respondents	1,306
Over-indexing segment(s)	64% of respondents from South & Southeast Asia answered that there aren't enough in-person events in their region

Close to 40% of respondents report that there are insufficient in-person events in their region, a sentiment especially visible among experienced PPC professionals and freelancers.

The gap is most significant in South and Southeast Asia, where 64% of respondents are dissatisfied with event options and and only 5% feel satisfied with the current selection. This highlights a clear opportunity to engage PPC enthusiasts in the region by offering more in-person events tailored to their needs.

The Top 50 Most Influential PPC Experts

You'll find our list of the Top 50 Most Influential PPC Experts of 2026 on PPCsurvey.com, including a detailed breakdown of our methodology for getting to this ranking.

Also, be sure to check out our alphabetical "shortlist" of the Top 100 Most Influential Experts.

We hoped you enjoyed the report!

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