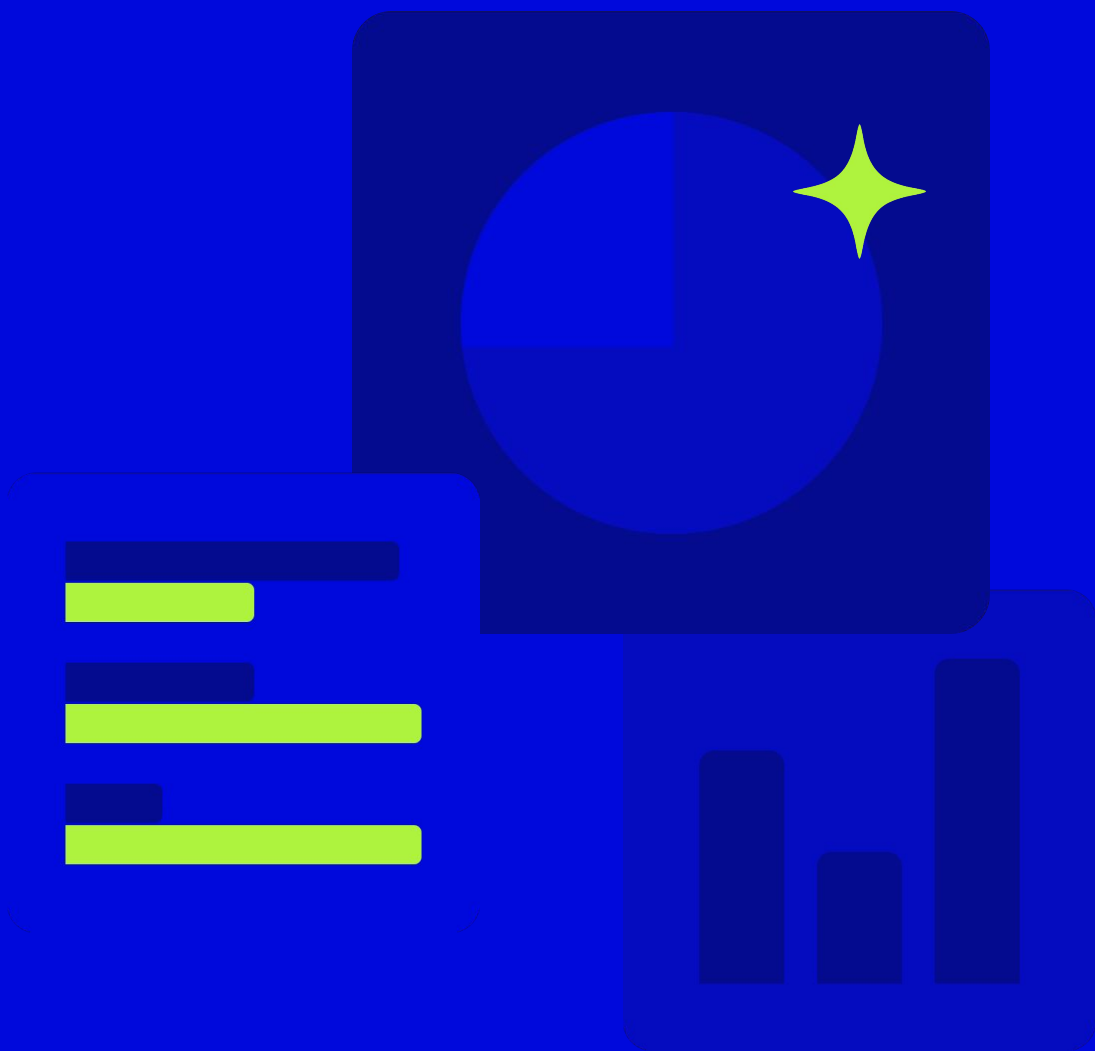


THE STATE OF AI MATURITY

AD AGENCY GENERATIVE AI ADOPTION SURVEY



AGENDA

→ 01 Executive Summary

→ 02 Core Analysis and Findings

→ **A** AI Strategy and Adoption Status

→ **B** Competitive Imperative and Future Outlook

→ **C** Barriers and Support Needs

→ **D** Client Engagement and Measurement

→ **E** ROI and Use Cases

→ **F** Governance and Internal Structure

→ 03 Key Takeaways & Recommendations

→ 04 About AI Digital Labs

01. EXECUTIVE SUMMARY

The "Ad Agency GenAI Adoption Survey" reveals that the advertising industry is at a critical inflection point: **AI is viewed as essential for competitive survival, yet the majority of agencies are strategically stalled**. The analysis of 56 executive responses highlights a profound gap between aspirational goals and operational reality, creating both massive opportunities for proactive agencies and significant risk for slow adopters.



HIGH IMPERATIVE, LOW MATURITY:

Agencies rate the importance of advanced AI capabilities to staying competitive at **8.1 out of 10**. However, **66%** of organizations are stalled in the early stages, either "Drafting a roadmap" or engaged in "Mostly ad-hoc experimentation".



THE TALENT CRISIS:

The single greatest barrier to adoption is the **"Skills gap / training needs" (60.7%)**. This talent deficit is compounded by the fact that **51.8%** cite being **"too busy with daily work"** as a top barrier.



THE MEASUREMENT BLIND SPOT:

Agencies lack verifiable proof of value. A significant **46.4%** report that they **"don't measure yet"** how AI is impacting their agency.



DIFFERENTIATION RISK:

The industry faces a narrative deficit, as **57.1%** admit they have only **"talking points but nothing unique"** to differentiate their agency on AI when pitching for new business

The shift to AI is inevitable, with a consensus that the business will be fundamentally different by 2030 (rated 8.2/10). Agencies must urgently pivot from treating AI as a side project to institutionalizing talent development, formalizing governance, and establishing clear performance metrics to bridge the gap between aspiration and outcome.

02. CORE ANALYSIS AND FINDINGS

A) AI STRATEGY AND ADOPTION STATUS

The industry is in a state of active discussion and experimentation regarding AI implementation, though fully scaled integration remains a minority position. Adoption is characterized by a strong intent to plan, but a weak actual implementation at scale.

Detailed Findings:

- **Strategy Status:** The most common organizational stance on an AI strategy is "Drafting a roadmap—still in discussion" (33.9%), closely followed by "Mostly ad-hoc experimentation" (32.1%). This 66% majority highlights an industry in an exploratory, unformalized phase.
- **Scale of Adoption:** Only 16.1% of organizations report that "AI is embedded across every team; we're leading the charge", indicating that widespread, systemic adoption is in its infancy.
- **Tooling:** More than half of agencies (53.6%) currently do not have licensed marketing or advertising-specific AI tools or platforms, suggesting a reliance on free or general-purpose tools and a major opportunity for vendors.

02. CORE ANALYSIS AND FINDINGS

A) AI STRATEGY AND ADOPTION STATUS

ORGANIZATIONAL AI STRATEGY STATUS

61 OUT OF 61 ANSWERED

Drafting A Roadmap—Still In Discussion

34.4% 21 resp.

Mostly Ad-Hoc Experimentation

32.8% 20 resp.

AI Is Embedded Across Every Team; We're Leading The Charge

14.8% 9 resp.

Roadmap, Steering Committee, And KPIs In Place

11.5% 7 resp.

No AI Activity Yet - No Current Initiatives

6.6% 4 resp.

MARKETING AND ADVERTISING-SPECIFIC AI TOOLS LICENSED

61 OUT OF 61 ANSWERED

Yes

47.5% 29 resp.

No

52.5% 32 resp.

B) COMPETITIVE IMPERATIVE AND FUTURE OUTLOOK

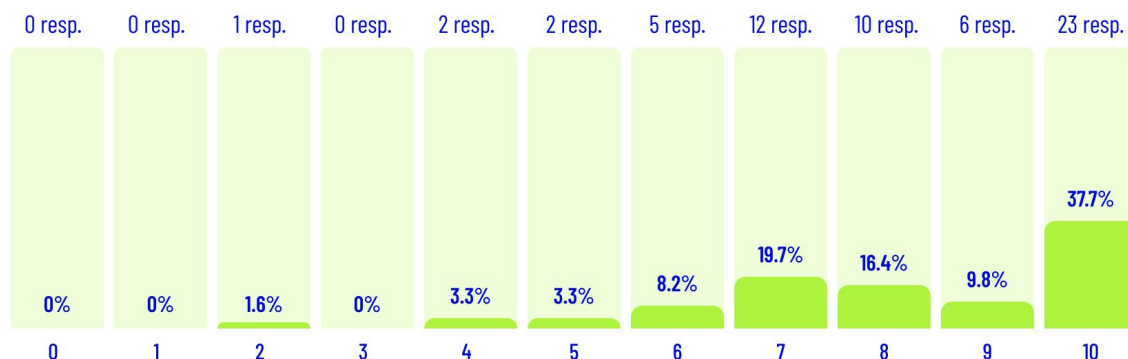
Ad agency professionals view AI capabilities as **a critical factor for future competitiveness**, yet most lack a unique, differentiating narrative, creating a significant market risk.

Detailed Findings:

- The Importance of AI:** The average importance rating for having advanced AI capabilities to staying competitive is a high **8.1 out of 10**, showing AI is considered essential, not optional.
- Future Transformation:** The expectation for business disruption is substantial: the average rating for how different the business will look because of AI by 2030 is 8.2 out of 10.
- Differentiation Gap:** A majority of respondents (**57.1%**) feel that while they have talking points about AI, they lack a truly unique story that differentiates their agency when pressed by a prospect. Only 16.1% have a battle-tested AI story.
- Client Satisfaction:** Agencies believe stronger AI capabilities could significantly raise client satisfaction, with an average rating of **7.7 out of 10** for potential uplift

IMPORTANCE OF AI TO STAYING COMPETITIVE

61 OUT OF 61 ANSWERED



B) COMPETITIVE IMPERATIVE AND FUTURE OUTLOOK

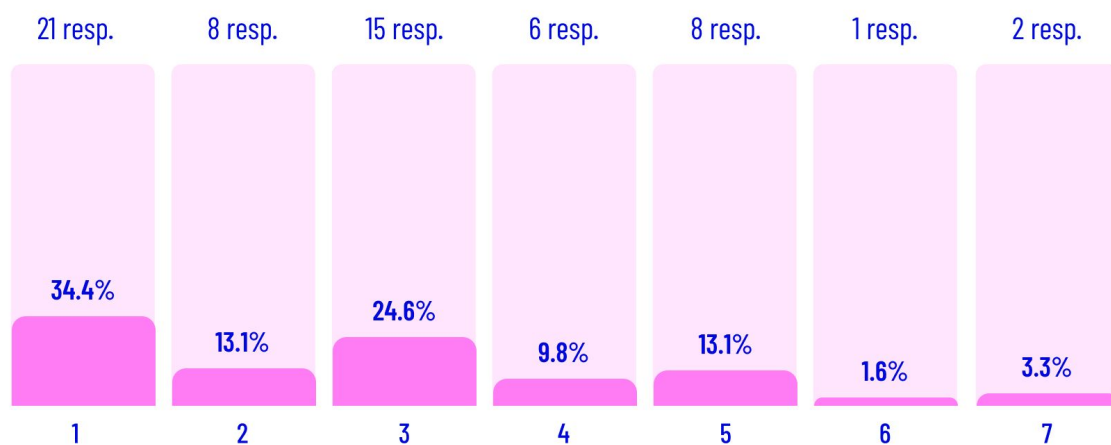
BIGGEST AREAS OF NEED FOR AI HEATMAP OR BAR CHART OF TOP 3 NEEDS

61 OUT OF 61 ANSWERED

AUDIENCE SEGMENTATION / LOOK-ALIKES



AUDIENCE RESEARCH & MEDIA PLANNING



C) BARRIERS AND SUPPORT NEEDS

The primary barriers to AI adoption are **human capital and internal momentum**, not budget or technology, underscoring the need for immediate, targeted investment in training.

Detailed Findings:

- **Top Barrier:** The single greatest obstacle to AI adoption is the **"Skills gap / training needs" (60.7%)**, highlighting a crisis in internal talent readiness.
- **Internal Prioritization:** The second-largest barrier is **"Side project / too busy with daily work" (51.8%)**, indicating a failure to integrate AI into core, mandatory workflows.
- **External Support Demand:** The most requested external support by far is a cited by 73.2% of respondents, confirming the urgency **"Staff upskilling bootcamp"**, of the skills gap. **"Leadership workshop"** is the second-highest request (53.6%).

C) BARRIERS AND SUPPORT NEEDS

TOP 3 BARRIERS TO AI ADOPTION

61 OUT OF 61 ANSWERED

Skills Gap / Training Needs

59% 36 resp.

Side Project / Too Busy With Daily Work

52.5% 32 resp.

Technology Integration Challenges

45.9% 28 resp.

Data Privacy / Security Worries

41% 25 resp.

Unclear ROI

39.3% 24 resp.

Limited Budget

34.4% 21 resp.

Client Concerns About AI Use

19.7% 12 resp.

Leadership Buy-In

8.2% 5 resp.

C) BARRIERS AND SUPPORT NEEDS

EXTERNAL SUPPORT TO ACCELERATE AI JOURNEY

61 OUT OF 61 ANSWERED

Staff Upskilling Bootcamp



Leadership Workshop



Thought-Leadership Resources



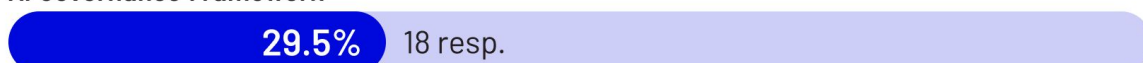
Workflow Redesign Sprint



Custom Agent / Tool Build



AI Governance Framework



D) CLIENT ENGAGEMENT AND MEASUREMENT

Client inquiries about AI are becoming routine, but a significant portion of the agency industry **cannot quantify AI's business impact**, hindering strategic reporting and accountability.

Detailed Findings:

- **Client Inquiry Frequency:** 74.5% of respondents report that clients ask about their AI capabilities "Sometimes" (40%) or "Rarely" (29.1%).
- **Measurement Blind Spot:** The top two reported methods for measuring AI's impact are equally split: "Time savings / efficiency metrics" and "We don't measure yet", both accounting for 46.4%. This shows a critical lack of ROI measurement.
- **Lack of Performance Metrics:** Only 21.4% measure "Campaign performance lift," and 17.9% track "Cost reduction / margin improvement", demonstrating a reliance on soft metrics (time savings) over hard business outcomes (profit/revenue).

D) CLIENT ENGAGEMENT AND MEASUREMENT

AI'S IMPACT MEASUREMENT

61 OUT OF 61 ANSWERED

Skills Gap / Training Needs



Side Project / Too Busy With Daily Work



Technology Integration Challenges



Data Privacy / Security Worries



Unclear ROI



Limited Budget



Client Concerns About AI Use



D) CLIENT ENGAGEMENT AND MEASUREMENT

CLIENT INQUIRY FREQUENCY ABOUT AI CAPABILITIES

60 OUT OF 61 ANSWERED

Staff Upskilling Bootcamp



Leadership Workshop



Thought-Leadership Resources



Workflow Redesign Sprint



Custom Agent / Tool Build



E) ROI AND USE CASES

Creative generation currently delivers the clearest Return on Investment (ROI), but agencies see the greatest strategic need for AI in automating efficiency and generating insights.

Detailed Findings:

- **Clearest ROI:** The single use-case delivering the clearest immediate ROI is "Creative generation / dynamic creative" (26.8%). This validates GenAI's immediate value in content production.
- **Biggest Strategic Need:** The top area identified as the "biggest need" for AI is "Creating strategic difference for clients / new business" (ranked #1 by 37.5% of respondents), followed by "Reporting & insight automation" (ranked #1 by 30.4%). This suggests a desire to pivot from tactical efficiency to high-value strategic functions.

E) ROI AND USE CASES

SINGLE USE-CASE DELIVERING CLEAREST ROI

61 OUT OF 61 ANSWERED

Creative Generation / Dynamic Creative

24.6% 15 resp.

Reporting & Insight Automation

21.3% 13 resp.

Audience Research & Media Planning

19.7% 12 resp.

Media Buying & Bid Optimization Worries

14.8% 6 resp.

Audience Segmentation / Look-Alikes

9.8% 6 resp.

Back-Office QA, Billing, Reconciliation

4.9% / 3 resp.

Budget Pacing & Alerts

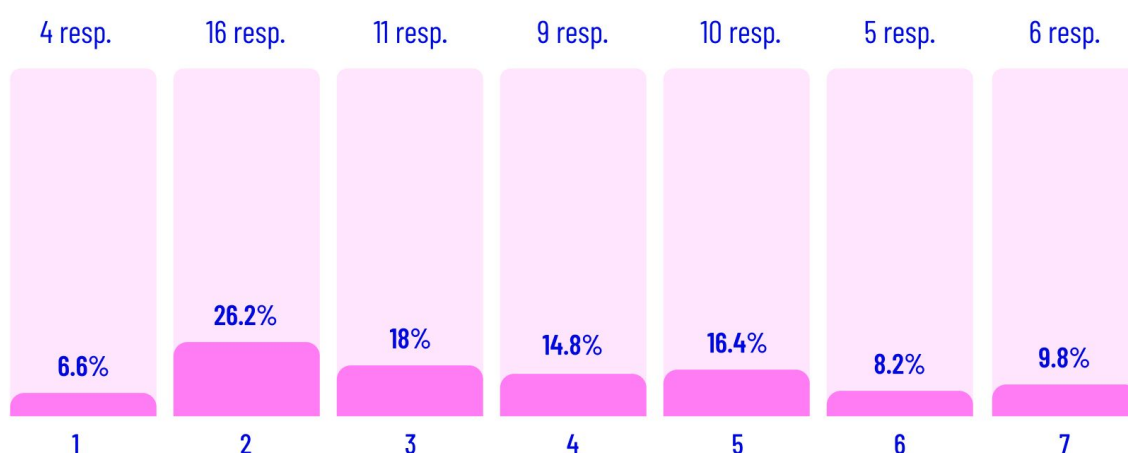
4.9% / 3 resp.

E) ROI AND USE CASES

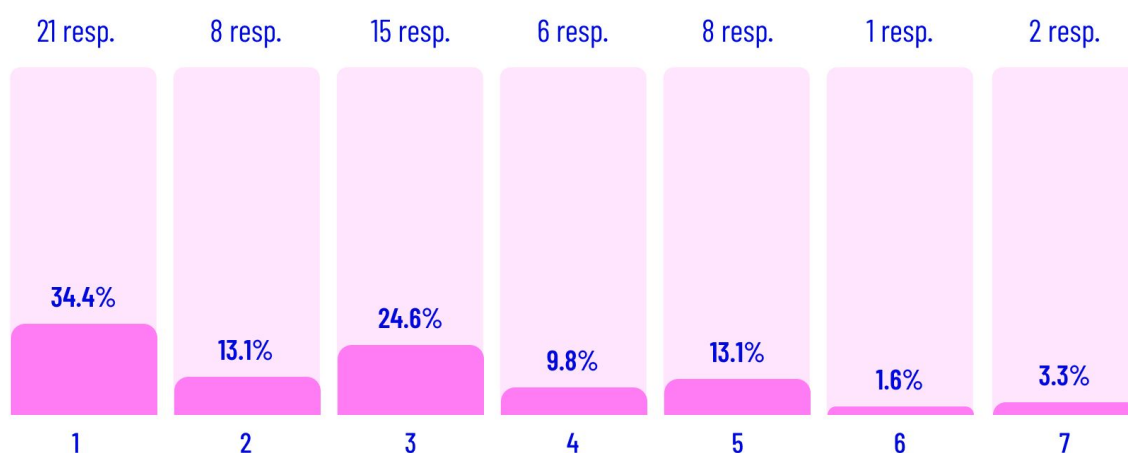
BIGGEST AREAS OF NEED FOR AI HEATMAP OR BAR CHART OF TOP 3 NEEDS

61 OUT OF 61 ANSWERED

AUDIENCE SEGMENTATION / LOOK-ALIKES



AUDIENCE RESEARCH & MEDIA PLANNING

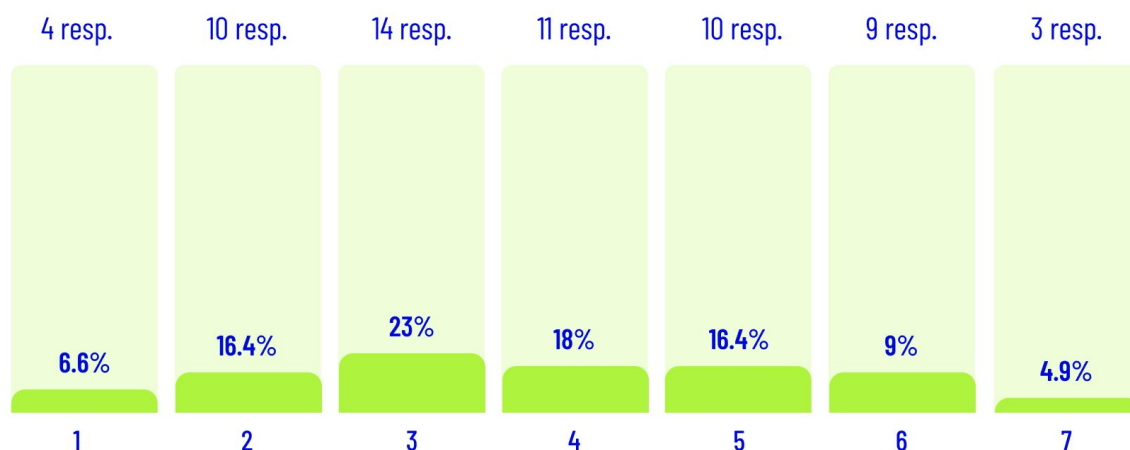


E) ROI AND USE CASES

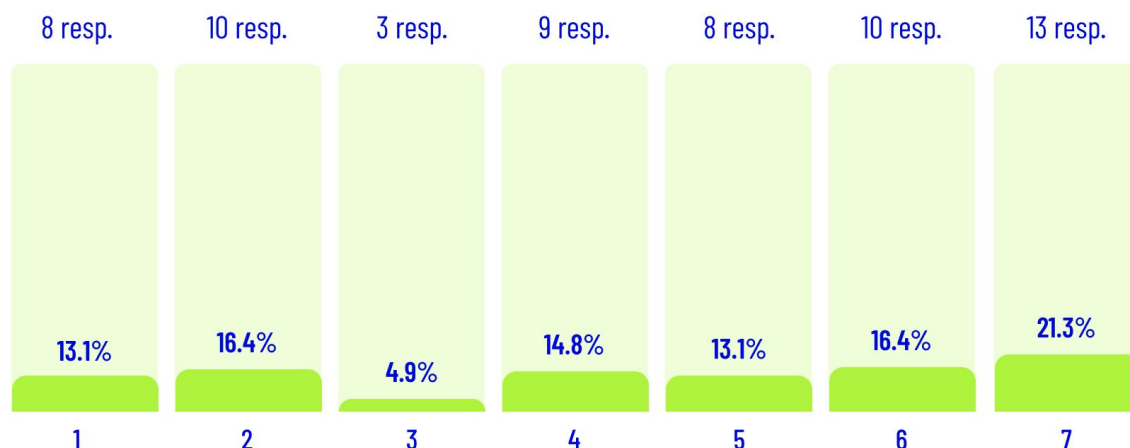
BIGGEST AREAS OF NEED FOR AI

61 OUT OF 61 ANSWERED

MEDIA BUYING & BID OPTIMIZATION



CREATIVE GENERATION / DYNAMIC CREATIVE

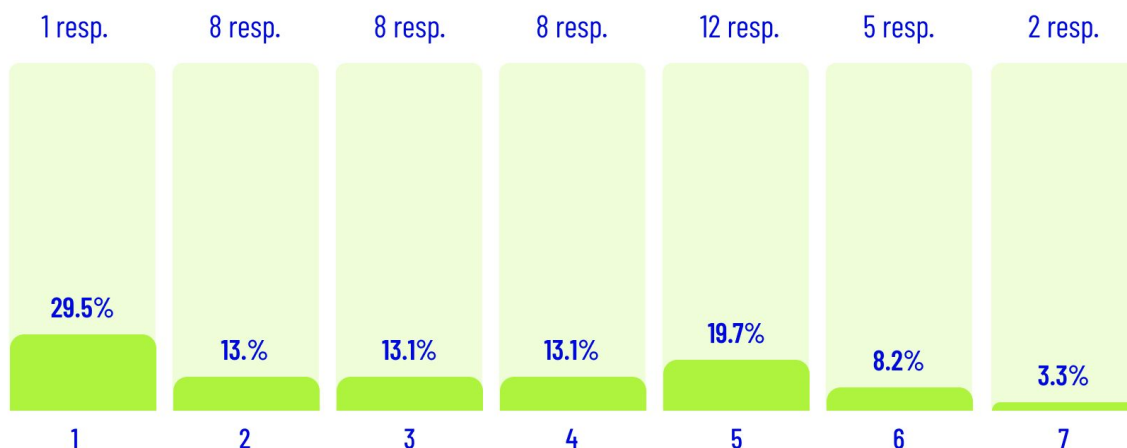


E) ROI AND USE CASES

BIGGEST AREAS OF NEED FOR AI

61 OUT OF 61 ANSWERED

REPORTING & INSIGHT AUTOMATION



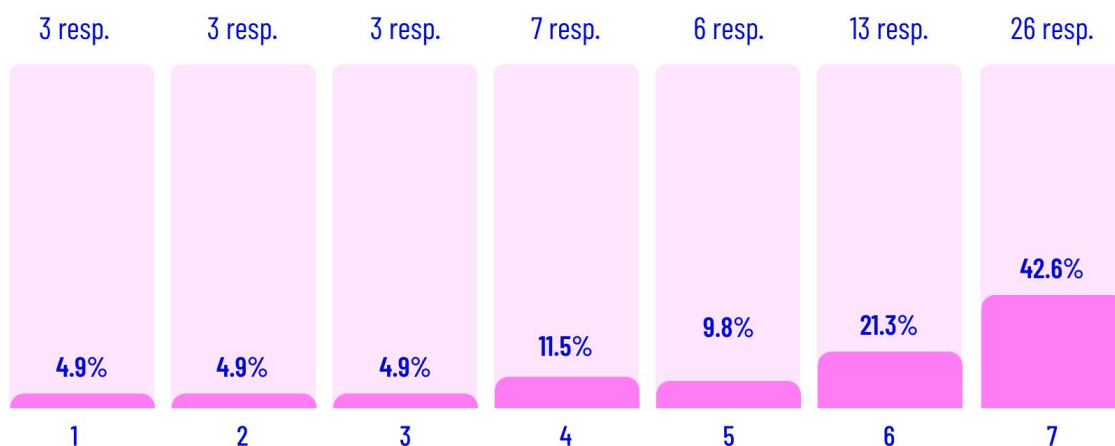
BUDGET PACING & ALERTS



E) ROI AND USE CASES

BIGGEST AREAS OF NEED FOR AI

61 OUT OF 61 ANSWERED



F) GOVERNANCE AND INTERNAL STRUCTURE

Agencies are lagging in formalizing AI governance and internal knowledge sharing, exposing both the agency and their clients to unnecessary risk.

Detailed Findings:

- **The single Data Safeguarding Policy:** Only 16.1% have "comprehensive policies with regular training" in place to safeguard agency and client data, while 30.4% "haven't done anything here". This regulatory and security gap is a high-risk factor.
- **Knowledge Sharing:** A majority (58.9%) of agencies do not maintain a shared prompt or best-practice library, meaning knowledge is siloed and best practices are not scaled efficiently.
- **Internal Teams:** Only 37.5% have an AI champions group or working group, indicating that structured ownership of AI initiatives is lacking in most organizations.

F) GOVERNANCE AND INTERNAL STRUCTURE

AI POLICIES/GUIDELINES FOR DATA SAFEGUARDING

61 OUT OF 61 ANSWERED

No, Haven't Done Anything Here

47.5% 29 resp.

Yes, Basic Guidelines Documented

44.3% 27 resp.

Currently Developing Them

23% 14 resp.

No, But On Our Roadmap

21.3% 13 resp.

Yes, Comprehensive Policies With Regular Training

19.7% 12 resp.

MAINTENANCE OF SHARED PROMPT/BEST-PRACTICE LIBRARY

61 OUT OF 61 ANSWERED

Yes

59% 36 resp.

Building One Now

24.6% 15 resp.

No

16.4% 10 resp.

03. KEY TAKEAWAYS & RECOMMENDATIONS

The findings of this report synthesize the agency industry's current relationship with AI, which is characterized by high conviction but low structural readiness. Key takeaways can be distilled into three tensions:

1. **The Conviction vs. Capability Gap:** The market is acutely aware of the existential threat and opportunity posed by AI, rating its importance to competitiveness highly (8.1/10). However, this conviction is undermined by a profound capability deficit, where the "Skills gap / training needs" (60.7%) and the absence of formalized workflow (32.1% in ad-hoc experimentation) prevent scaling. The training provided is often informal (Self-guided resources at 56.4%), failing to meet the demand for structured skill acquisition.
2. **The Tactical Win vs. Strategic Need:** Agencies have found immediate, tactical success with AI, most notably in "Creative generation / dynamic creative" (delivering the clearest ROI at 26.8%). This is a critical tactical win. Yet, the industry's greatest strategic need is focused on automating efficiency and strategic functions, such as "Reporting & insight automation" and "Creating strategic difference". The industry must deliberately transition resource allocation from volume creation to complex, high-value strategic applications.
3. **The Risk vs. Reward Disconnect:** Agencies overwhelmingly expect AI to transform their business (8.2/10 future change), recognizing the potential reward. Yet, they are lagging in mitigating the associated risks. A significant 30.4% have "No, haven't done anything here" regarding data safeguarding policies. Furthermore, the inability to measure the impact (46.4% don't measure yet) means investment decisions are being made without quantifiable performance or margin data, exposing the agency to both operational and reputational risk.

RECOMMENDATIONS



PRIORITIZE AND FORMALIZE TALENT INVESTMENT

- **Mandate Upskilling Programs:** Immediately allocate budget to staff development, prioritizing the in-demand "Staff upskilling bootcamp" model over ad-hoc learning resources.
- **Establish Internal Ownership:** Formalize AI governance by establishing an AI Working Group to ensure accountability and drive initiative momentum, moving beyond the "side project" mentality.
- **Scale Knowledge Sharing:** Implement a mandate for a shared prompt or best-practice library to efficiently scale internal knowledge and proven techniques across teams.



ESTABLISH CLEAR VALUE METRICS (ROI)

- **Mandate Upskilling Programs:** Move Beyond Efficiency: Shift the focus of AI measurement from soft metrics like "Time savings" to hard business KPIs. Mandate the tracking of "Campaign performance lift" and "Cost reduction / margin improvement" to prove AI's financial value to both the agency and the client.
- **Define a Unique AI Story:** Invest in strategic workshops to develop a "distinct, compelling AI story" that translates technical capability into demonstrable client value, moving beyond generic talking points.



IMPLEMENT IMMEDIATE GOVERNANCE AND RISK MITIGATION

- **Mandate Data Safeguarding Policies:** Immediately establish and mandate comprehensive AI policies and provide regular training to staff to address the 30.4% of agencies currently without policies. This is essential for protecting client data and maintaining client trust.
- **Formalize Strategy:** For the 66% of agencies in planning or experimentation phases, commit to a formal roadmap with KPIs and a steering committee to ensure structured, scaled adoption rather than sporadic ad-hoc efforts.

DO YOU HAVE AN AI STRATEGY?



 **LET'S BUILD AI STORY
THAT DIFFERENTIATES YOUR AGENCY.**

Reach out to see how AI Digital Labs
can elevate your outcomes.

sales@aidigital.com