2026 H2

Market Report

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

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Introduction

Thank you for reading Mediaocean's 2026 H2 Market Report. These insights reflect input from 312 marketing professionals, focused on key consumer, technology, and media investment trends for the second half of 2026. We primarily surveyed marketers and agencies, but also included perspectives from media companies, measurement firms, tech platforms, and other industry cohorts.

This is the tenth in our series of bi-annual market reports, reflecting more than 6,400 total respondents, with the first published at the end of 2021. The most recent data points used in this research are based on surveys conducted in May 2026.

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Foreword

By Chris “Coz” Costello, Founder and Principal Analyst, Sixteenth Note Analytics

Some call it “test and learn.” Others call it “throwing everything at the wall to see what sticks.” Whatever you call it, marketers have been doing it for as long as there has been marketing. And the evolution of digital marketing over the last several decades has provided an ever-shifting set of technologies, regulations, and user behavior that has only made these efforts more important.

For the sake of the Mediaocean 2026 H2 Market Report, we will settle on calling it maturation and nowhere is that maturation clearer than in the current stage of artificial intelligence’s rapid rise in digital marketing. Where the last installment of this report saw great gains in forward-looking enthusiasm around AI, this time around marketers are turning that momentum into finding the best applications of these AI capabilities rather than AI just for its own sake.

Make no mistake, this still translates into increasing investment, with AI netting the top score among respondents when it comes to areas expected to boost spending in the near term. In fact, the share of marketers increasing spend was more than double that of those maintaining current levels. CTV, digital display/video, and social platforms were also areas where the percentage of respondents increasing their investment was higher than those holding steady.

If we combine the respondents looking to increase spending with those looking to maintain, we see perhaps a more classic definition of maturity. In this view, the legacy digital channels of search and social perform well, while digital display/video and retail media also score among the top. And in each of these cases, more marketers indicated an increase in future spending than a decrease.

AI was also rated both second-most critical among capabilities and media investments, as well as the most important consumer trend to watch. It also saw a big increase in the share of marketers who deemed it critical. So the bigger question is, how is AI being deployed and what is it considered to be doing well?

When asked this explicitly, survey respondents said data analysis and creative development. The former is an obvious area of concern among those surveyed for this report, as cross-device, cross-publisher, and cross-channel measurement continues to make holistic tracking difficult for us mere humans. And creative testing is where the scale of AI can make better sense of more complicated testing plans, which may be why there was a huge jump in reported usage since the previous survey.

This stands in contrast to both copywriting and image generation, which saw lower adoption rates. These are still areas where AI is being brought to bear, but maybe not to the degree of some of the more alarming reports. Hopefully, this provides some relief to creative teams everywhere, although I’m sure they would like to see those numbers even lower.

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Holistically, this paints a picture of AI working its way into the tools and processes of modern digital marketing, helping to sort out data—and first-party data, in particular—to enhance performance-driven media and better customized messaging for audiences using better testing and more automation. This is a more tempered opinion of AI, where practitioners are realizing that the bright shiny object will not and cannot transform everything overnight. More and more, respondents are seeing AI as more of an incremental difference-maker, and edge cases like the use of AI agents are still largely in consideration rather than in practice.

The leveraging of first-party data, squaring the circle of complex, siloed measurement and targeted creative messaging also define CTV, which is another topic that consistently broke toward the top in the survey. And the struggle here is real, with measurement and data concerns consistently cited as challenges for the channel. The future will undoubtedly see AI have an impact in helping solve for these as well.

In the meantime, data and automation solutions are in market that start to bridge these gaps. Survey respondents saw multiple benefits to "direct-to-publisher" transaction workflows and tipped their hands on what were the most important elements of ad verification going forward.

Overall, the story is one of increasingly pragmatic growth in the newer domains of AI and CTV, and not at the expense of more established digital channels. And the legacy challenges of those legacy channels have been passed along to the new upstarts, along with some hints of how the newer developments may be able to solve them.

As for the AI question alone, there's something for everybody here even if the hype seems to have slowed somewhat. For the true believers, it's still important, growing, and worth watching. For the skeptics, the indicators that AI may fit better into specific roles and processes has to be encouraging on some level. Either way, it's something we are sure to continue talking about in future surveys, and I'm excited to see how it all turns out.

Chris 'Coz' Costello
Founder and Principal Analyst,
[Sixteenth Note Analytics]

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Insight 1

Digital maturity signals the arrival of the “core pillar” era

While H1 2026 was defined by renewed investment across the board, heading into H2, marketers are shifting from broad expansion to strategic maturation and operational discipline. Marketers are no longer simply adding to their digital spend; they are optimizing, moving away from broad-stroke expansion toward a precision-led approach that favors ROI and efficiency. In mature digital channels, a move from “Increase” to “Maintain” does not signal a retreat, but rather that these platforms have become foundational to the modern media mix.

AI Media emerged as the strongest growth area for H2, with 60% of respondents planning to increase spend. The category is being propelled by the rapid maturation of generative platforms, most notably ChatGPT, which has accelerated its ads program to capture high-intent, conversational discovery. With OpenAI projecting $100 billion in ad spend on ChatGPT by 2030, we can expect AI media to continue to show rocket-ship growth.

The surge in AI is supported by the foundational stability of legacy digital giants, with 88% of respondents in Social and 92% in Search planning to maintain or grow their commitments. These platforms continue to serve as reliable performance engines supporting broader experimentation with AI-driven media.

While AI represents the new frontier, Connected TV (CTV) has officially graduated to a permanent powerhouse. The era of CTV as a “growth experiment” has concluded. Despite a slight cooling in “increase” sentiment to 55%, a massive 89% of the market remains committed to the channel. CTV has become a non-negotiable reach vehicle, effectively absorbing the premium video budgets that once belonged to linear.

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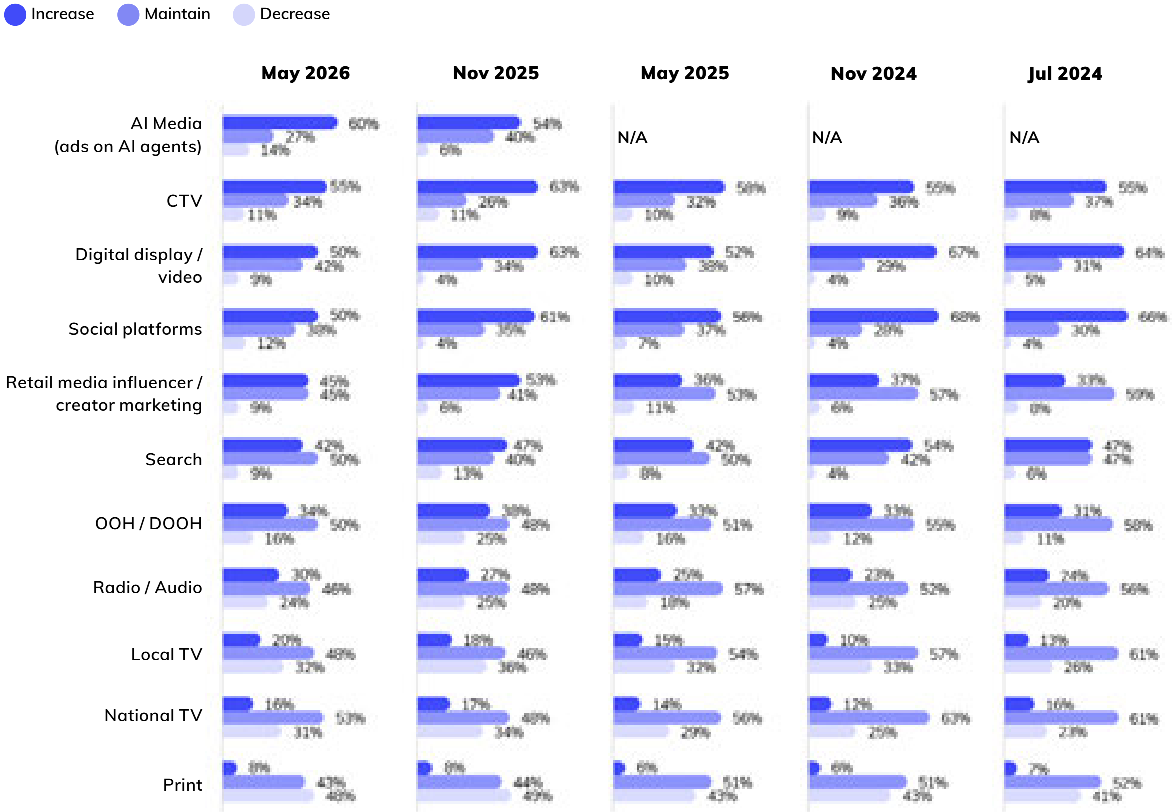
For each media channel below, do you expect to increase, decrease, or maintain your spend?



Source: Mediaocean 2026 H2 Market Report
Methodology: Five surveys of 3,015 total marketing professionals conducted between July 2024 and May 2026

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This shift toward “must-have” status is mirrored in Digital Display and Video, where growth rates have reached strategic saturation. A dominant 92% of marketers are now either maintaining or increasing their spend in these categories, signaling that they are now considered essential media components.

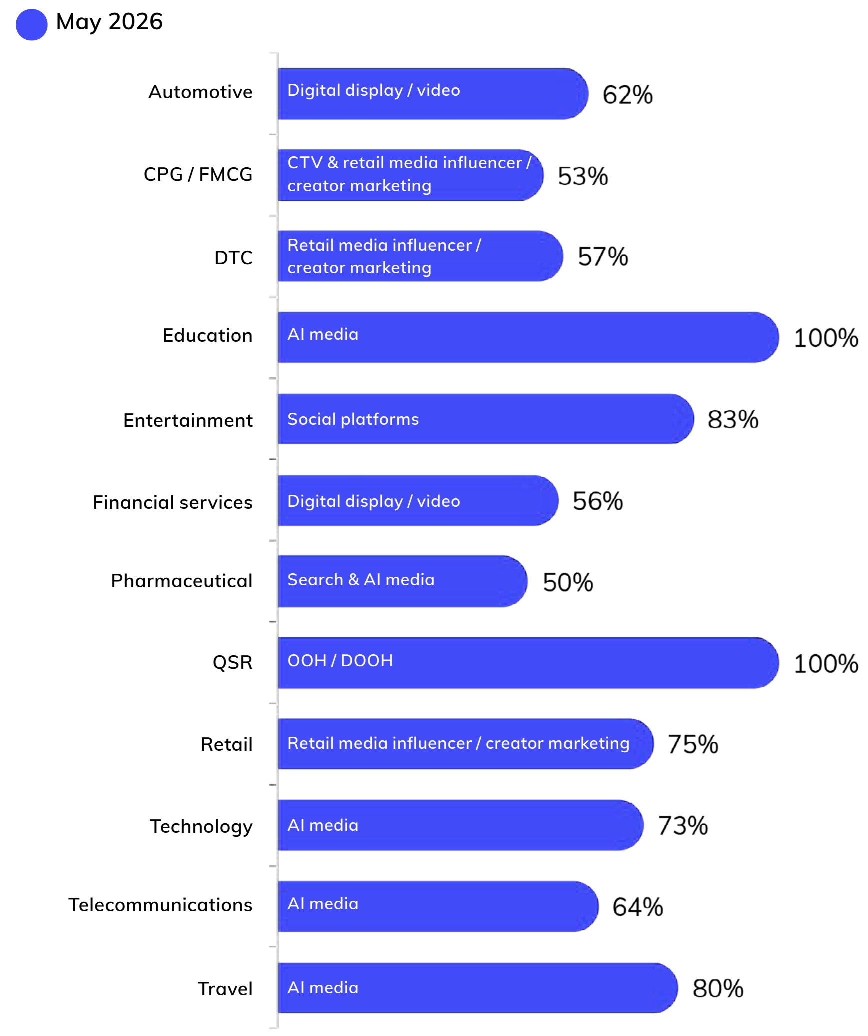
In a surprising H2 rebound, Radio and Audio are defying the cooling trends seen elsewhere, posting an almost 12% jump in increase-intent. The continued rise of “must-listen” podcasts and targeted digital audio environments is attracting budgets looking for high-engagement, “hands-free” consumer moments.

This stands in stark contrast to National TV, which continues to face headwinds with a 31% decrease in sentiment. However, Local TV has emerged as a distinct bright spot, with “Increase” sentiment rising to 20%. A key driver for US marketers is the “Home Turf” effect of the 2026 World Cup. Mediaocean reports an overall 331% surge in total World Cup TV ad spend compared to 2022, with brands increasingly utilizing local spot buys to dominate host-city environments across the 16 North American metros.

Print continues to lose share, with 48% of the market planning further cuts. Much of that investment is shifting toward AI-driven and advanced digital channels.

The transition toward maturation is clarified through a vertical lens, where industries are selecting specific “pillars” to solve unique challenges. AI Media is the exclusive growth driver for Education (100%) and the leader for Technology, Telecommunications, and Travel. Retail Media Influencer/ Creator Marketing has become the primary expansion tool for Retail and DTC, while OOH/DOOH stands out as the sole growth priority for QSR (100%). In more traditional sectors, Digital Display/Video leads for Automotive and Financial Services, with Social as the anchor for Entertainment. This confirms that the path to growth in H2 2026 is increasingly industry dependent.

Top media channels for planned spend increases by vertical
(Percent of respondents in each category that selected the item)



Source: Mediaocean 2026 H2 Market Report
Methodology: Survey of 312 total marketing professionals conducted in May 2026

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Insight 2

Performance as the anchor, testing as the lever

As marketers navigate continued economic uncertainty, investment priorities are increasingly centered around performance, measurement, and operational efficiency. For 62% of marketers, Performance-Driven Paid Media remains the undisputed #1 investment priority, acting as the most dependable investment area in a volatile market. This commitment is underpinned by a strict measurement mandate, with 50% of respondents prioritizing Measurement & Attribution Capabilities—a top-three pillar reflecting a market that refuses to invest unless every dollar can be fully accounted for through clear performance signals.

Fueling the ability to scale this performance anchor are AI and Automation, which have officially moved into the top five investment priorities for the first time. With 52% of marketers prioritizing AI and 36% focusing on automation, these technologies have transitioned from experimental novelties to the essential productivity engines of the marketing stack. They are now viewed as the primary catalysts for driving the efficiency required to maintain high-volume performance campaigns in an increasingly complex digitized industry.

However, the true growth story of the second half of 2026 lies in the creative layer. While performance provides the baseline, Creative Testing & Personalization saw the highest year-over-year jump at 42%, proving that marketers are now looking for better assets, not just better algorithms, to differentiate their brands.

Supporting this creative push is a strategic hedge toward First-Party Data Mastery. The 35% surge in data prioritization indicates that brands are successfully fortifying their own ecosystems, using proprietary insights to mitigate the impact of external signal loss and ensure that their performance-led strategies remain resilient against shifting privacy standards. Of note, OpenAI recently announced Custom Audiences for ChatGPT ads, which enable marketers to use their own first-party data for targeting on the platform.

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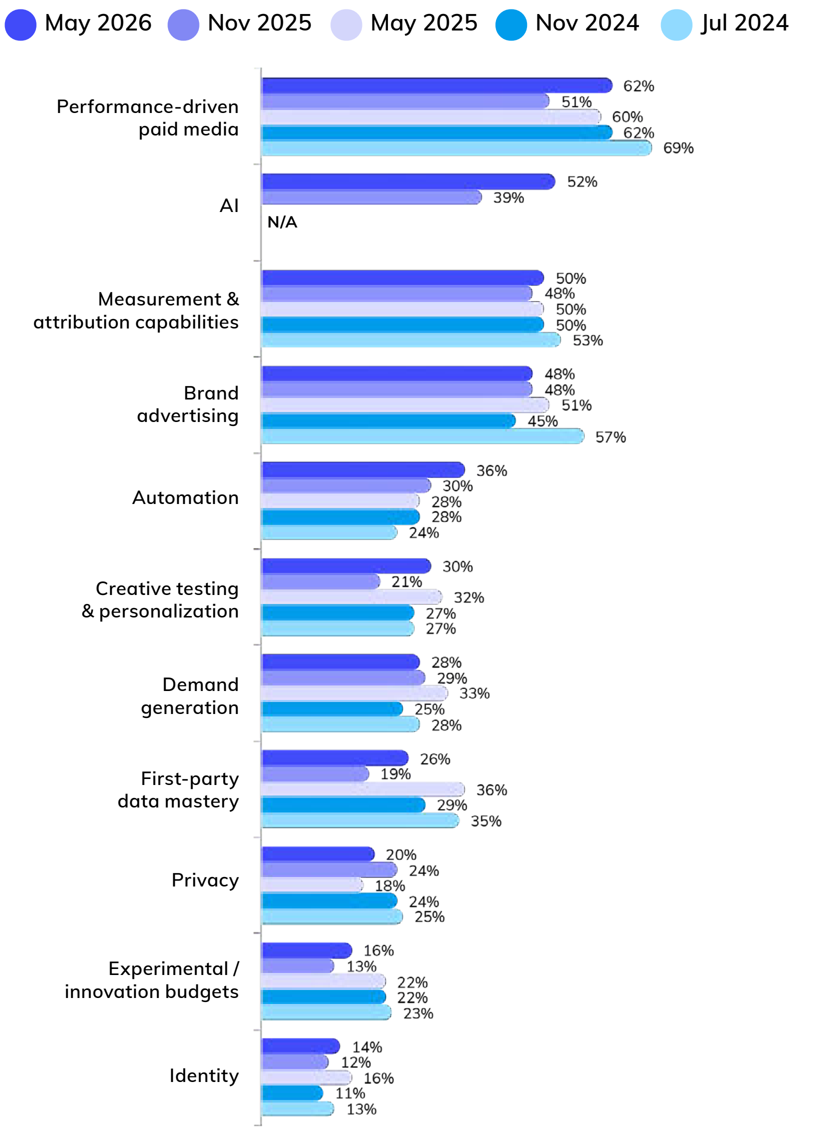
Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?
(Select all that apply)



Source: Mediaocean 2026 H2 Market Report
Methodology: Five surveys of 3,015 total marketing professionals conducted between July 2024 and May 2026

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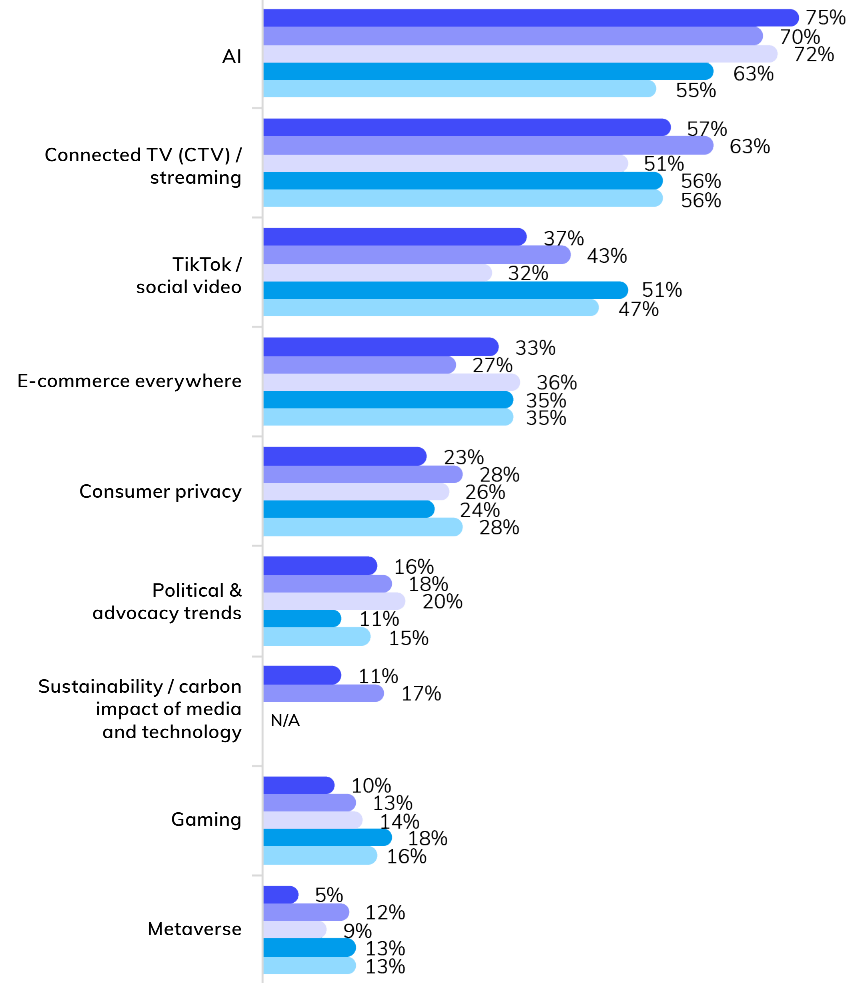
Insight 3

The pragmatic shift from hype to hands-on AI implementation

AI remains the dominant industry focus, with 75% of respondents citing it as the most important trend they are watching. However, the conversation has shifted from experimentation toward practical applications and operational value. This is especially evident with Data Analysis, where AI adoption rose more than 17% from the previous survey, with 50% of respondents now using it for reporting and performance insights.

This move toward active implementation is also visible in the explosive growth of Creative Development and Personalization. AI usage in creative development surged by more than 52%, as 43% of marketers now deploy the technology to solve bottlenecks that have historically limited omnichannel scale.

Simultaneously, brands are preparing for the AI-search era. AI usage for SEO jumped to almost 87%, representing the highest specific task growth recorded in the survey. This expansion is even reaching consumers directly, as Customer Service emerges as the next automation frontier. Adoption in this space saw a significant 39% increase, indicating that marketers are moving beyond internal efficiency tools to deploy AI in direct, customer-facing interactions.



Source: Mediaocean 2026 H2 Market Report
Methodology: Five surveys of 3,015 total marketing professionals conducted between July 2024 and May 2026

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Despite these specific tactical wins, the broader sentiment regarding daily operations has entered a more measured phase of adoption. The belief that AI is causing a “major transformation” in workflows fell from 28% to 19%, suggesting the industry is moving past peak hype and into a more realistic assessment of the operational challenges involved in connecting AI across fragmented systems and teams.

While 44% of respondents still report “moderate change” from AI, the number citing Minimal Impact more than doubled as organizations encounter the complexity of scaling AI beyond isolated use cases. This is especially apparent as projects move from pilots into production, where integration becomes increasingly more difficult. As a result, the number of respondents saying it is “too soon to tell” how AI will ultimately impact workflows increased by 69%.

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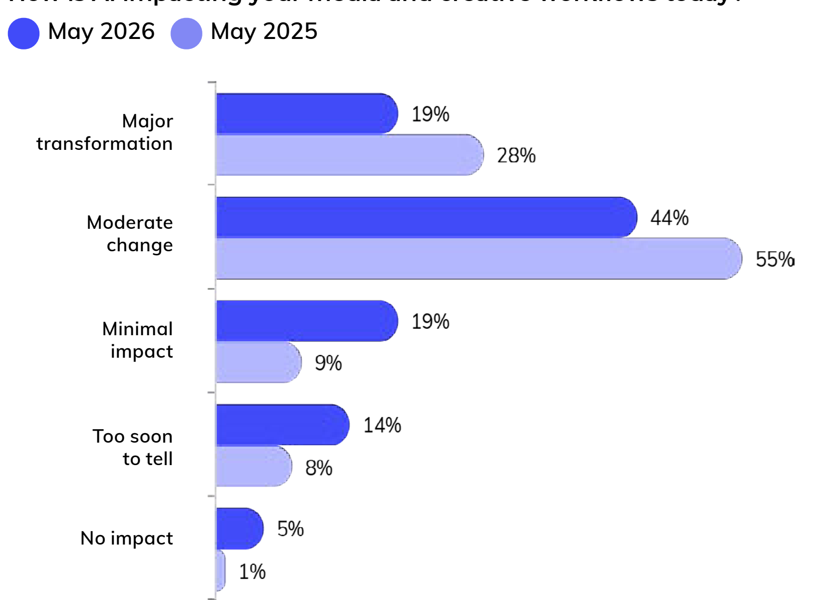
How is AI impacting your media and creative workflows today?



Source: Mediaocean 2026 H2 Market Report
Methodology: Two surveys of 776 total marketing professionals conducted between May 2025 and May 2026

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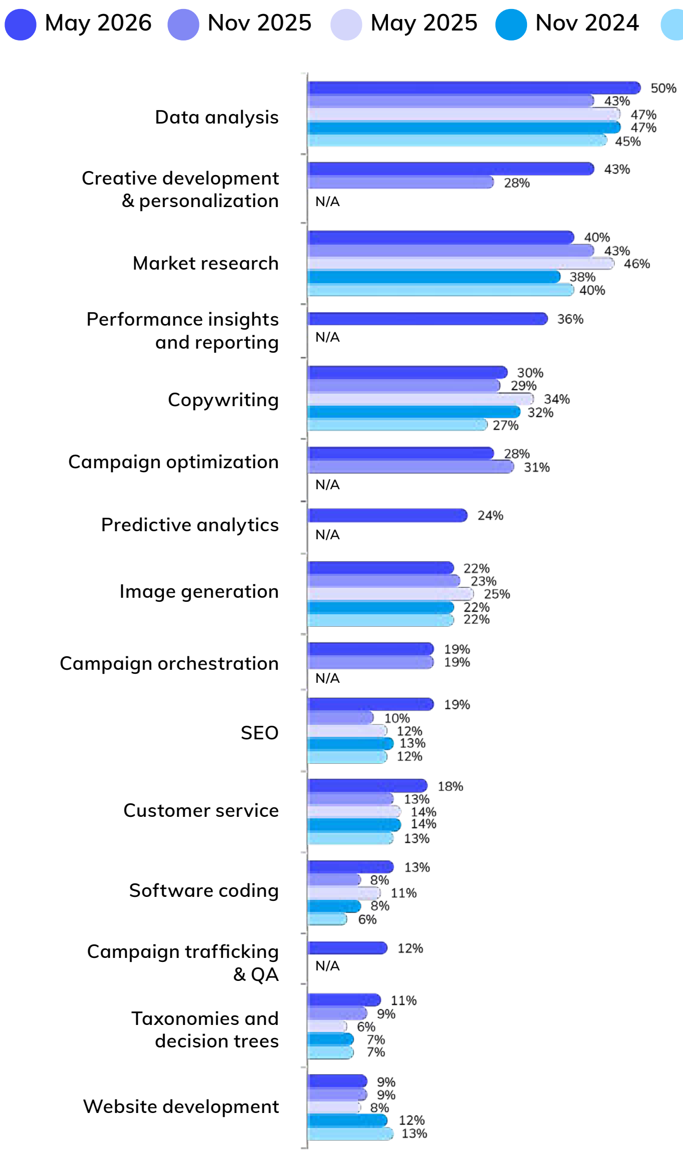
How are you currently using AI in your marketing?
(Select all that apply)



Source: Mediaocean 2026 H2 Market Report
Methodology: Five surveys of 3,015 total marketing professionals conducted between July 2024 and May 2026

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Insight 4

Navigating the gap between evaluation and autonomous production for AI agents

As the industry begins exploring more autonomous marketing workflows, sentiment reveals a market navigating a significant gap between initial evaluation and true production. While exactly half of the market remains in the Research and Evaluation phase, roughly 28% of marketers report having agents in production. For most of these early adopters, the transition has begun with small-scale deployments, with 18% of respondents reporting the use of between one and three agents.

A smaller group of respondents (6%) report operating more mature multi-agent environments, managing ecosystems of 10 or more agents across complex marketing workflows. At the same time, skepticism remains, with 22% reporting no current plans to adopt agents as many organizations take a more cautious approach to broader deployment.

Current deployment strategies are primarily focused on analytics and reporting, with Measurement serving as the leading use case for agent integration. Real-time data synthesis and cross-channel attribution emerged as the most widely deployed application, with 53% of respondents using agents to help analyze increasingly complex datasets. By contrast, more advanced Orchestration across platforms and execution remains relatively early, with only 16% of the market deploying agents across end-to-end workflows.

This hesitation around broader orchestration is largely driven by Governance concerns. Among respondents, 34% cite fears of “hallucinations” or unapproved spending decisions as the primary barrier to adoption, while 30% say they are struggling to establish “human-in-the-loop” checkpoints within autonomous workflows. Interoperability also remains a challenge, with 24% citing difficulty connecting agents across fragmented tools and platforms within the ad stack.

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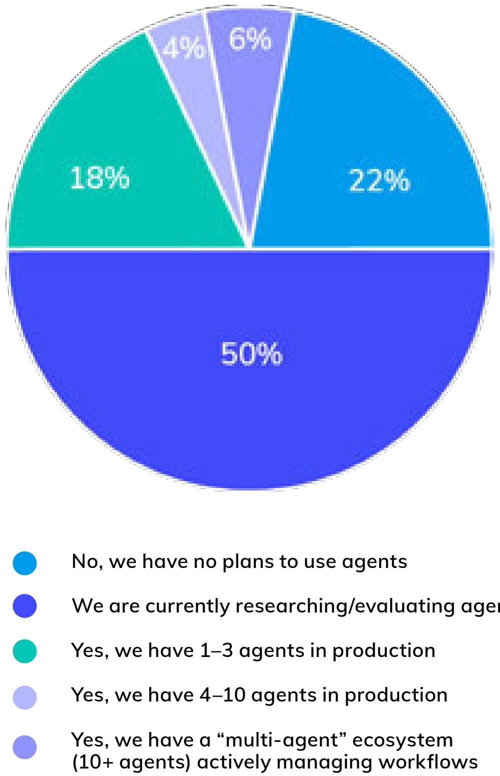
Are you currently deploying autonomous AI agents (systems that can take actions or make decisions with minimal human intervention) within your marketing tech stack?



Source: Mediaocean 2026 H2 Market Report
Methodology: Survey of 312 total marketing professionals conducted in May 2026

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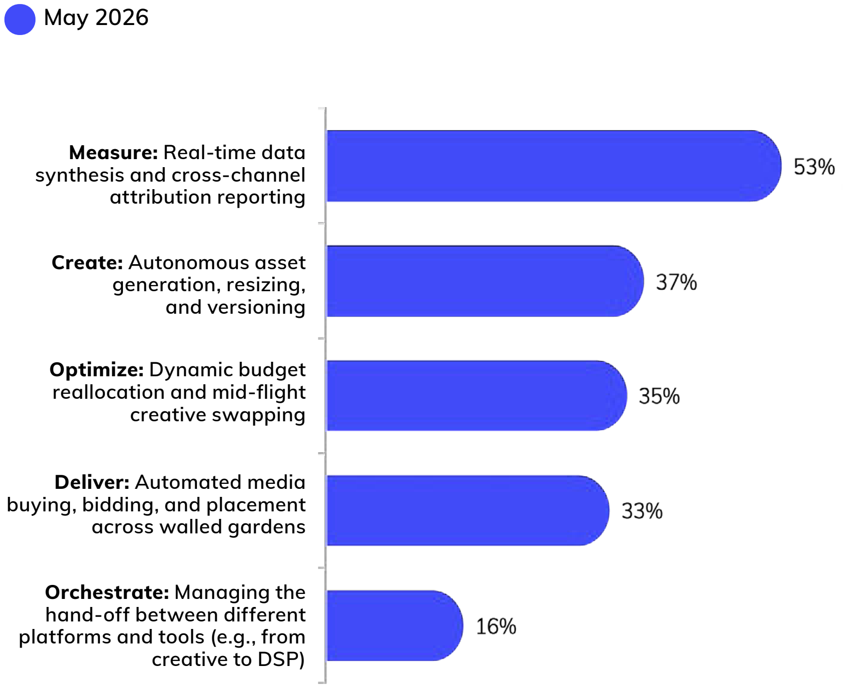
In which areas are you deploying AI agents to handle end-to-end tasks?

(Select all that apply)



Source: Mediaocean 2026 H2 Market Report
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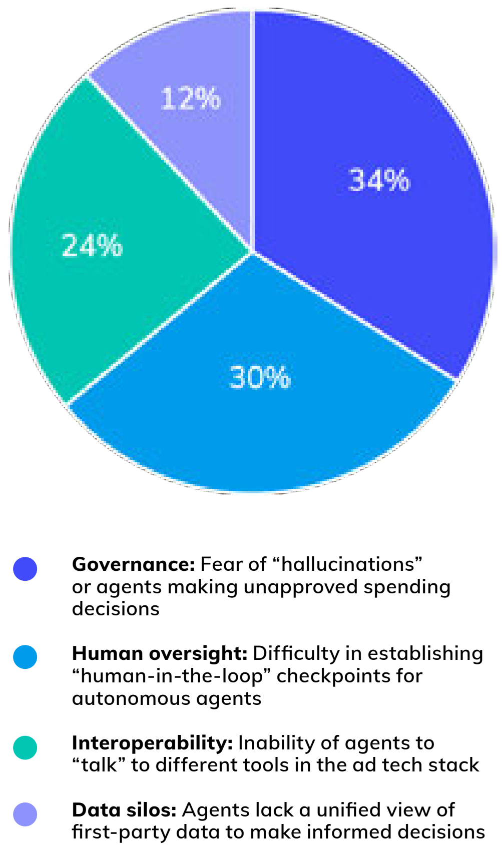
What is the primary hurdle in allowing AI agents to orchestrate your cross-channel campaigns?



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Insight 5

Bridging the CTV performance gap through unified visibility

CTV remains one of the most influential reach vehicles, yet it continues to grapple with a persistent performance paradox. Despite massive viewership, CTV is still struggling to be treated as a pure performance channel, with 26% of marketers identifying Inconsistent Measurement Methodologies as the primary structural hurdle.

These measurement challenges are especially apparent with frequency management, where 63% of respondents cite a Lack of Unified Measurement as their biggest challenge; a concern that has surged by 22% since our last report. As audiences continue to fragment across a sea of apps and devices, the industry is reaching a breaking point regarding its ability to manage reach effectively.

This lack of visibility has become a critical strategic priority for the 57% of marketers who currently feel hindered by Limited Cross-Channel Transparency. The "walled garden" nature of CTV apps is increasingly viewed as a major operational bottleneck, making the Deduplication of Reach a frustrating manual struggle for 25% of the market.

These logistical headaches are compounded by the fact that data silos persist; the challenge of Data Silos Across Platforms increased by 5% this cycle, proving that even as more capital flows into the big screen, the backend infrastructure has failed to fully integrate. However, the market's perspective on value remains clear: while 21% of respondents cite high CPMs as a challenge, the overall maintaining of CTV ad budget proves that the premium impact and attention of CTV still far outweighs the current technical friction. Marketers are choosing quality over efficiency, betting that the high-impact environment is worth the measurement tax while they wait for the tech stack to catch up to the scale of the investment.

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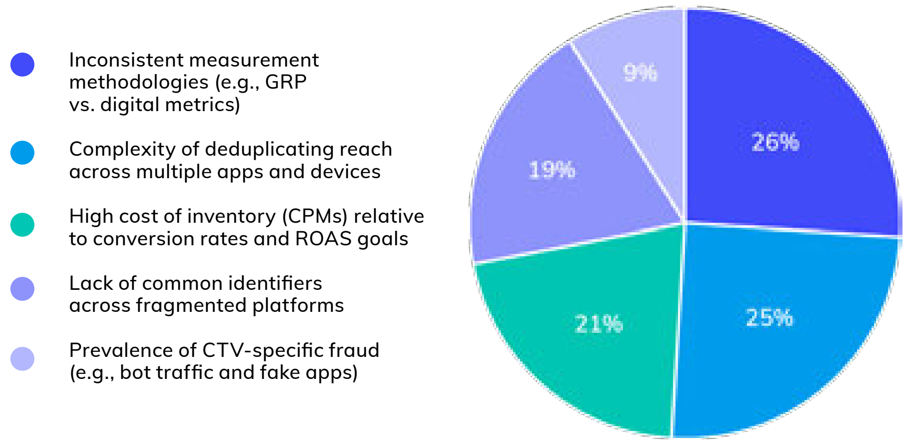
Which structural challenge most prevents you from treating CTV as a performance channel?



Source: Mediaocean 2026 H2 Market Report
Methodology: Survey of 312 total marketing professionals conducted in May 2026

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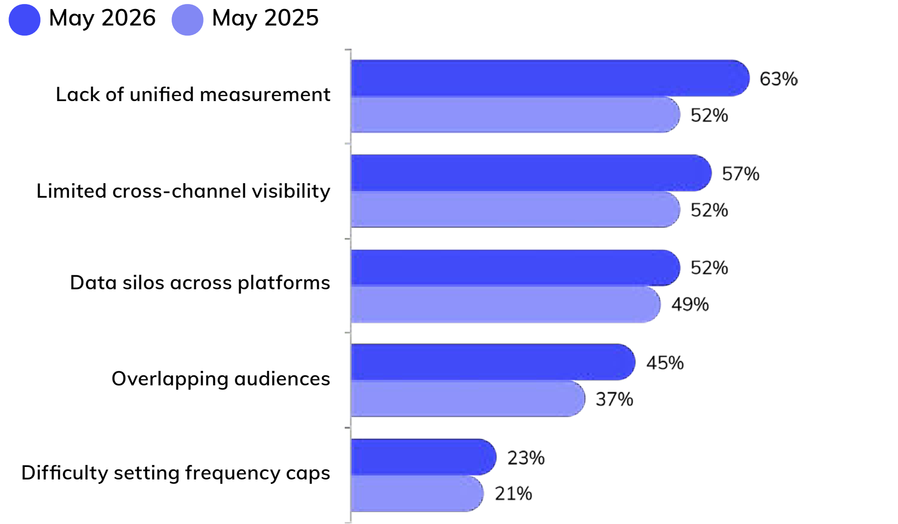
What are the biggest challenges you face with frequency management today? (Select all that apply)



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Insight 6

Modernizing transactions for strategic scale

In the persistent push for greater operational agility, the industry is witnessing a significant "spreadsheet exodus" as organizations prioritize API-driven automation to modernize their direct-to-publisher transactions. Currently, 35% of organizations are moving away from the manual work and spreadsheets that once defined legacy media buying, aiming instead for the Faster Activation required to keep pace with today's high-velocity market and achieve strategic scale.

This shift is not merely a technical upgrade; it's a fundamental strategy for human talent reallocation. By automating tedious administrative tasks, specifically the manual rekeying of orders, 17% of marketers are successfully reclaiming the time necessary to refocus their teams on high-impact sponsorships and Strategic Growth that require human creativity rather than manual data entry.

Beyond immediate time savings, workflow automation is increasingly viewed as a critical margin protector and a primary lever for Improved Economics. 22% of respondents identify automation as an essential tool for lowering operational costs, specifically targeting the reduction of intermediary tech fees and the prevention of revenue leakage that often occurs in fragmented manual chains.

This drive for efficiency is also fostering a new era of Operational Trust; 14% of respondents are leveraging automated workflows to improve the accuracy of financial operations through a single, unified system of record. And, for a forward-thinking 12% of the market, the ultimate benefit of automation is Modernized Transparency as a default; a direct, real-time connection between buyers and sellers that eliminates the "black box" of legacy transaction workflows and builds a more accountable foundation for the industry.

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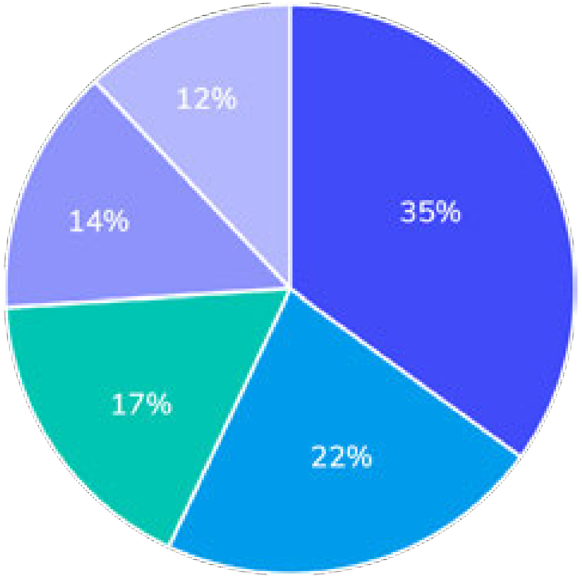
What is the most significant benefit your organization expects to gain by automating the "direct-to-publisher" transaction workflow?



- **Faster activation:** Moving from manual spreadsheets and PDFs to API-driven automation for faster execution and greater scale
- **Improved economics:** Lowering operational costs, minimizing intermediary tech fees, and reducing revenue leakage
- **Strategic growth:** Reclaiming time spent on administrative tasks (like rekeying orders) to focus on high-impact sponsorships and IP
- **Operational trust:** Improving the accuracy of financial operations and billing reconciliation through a single system of record
- **Modernized transparency:** Gaining real-time insights across a unified workflow that connects buyers and sellers directly

Source: Mediaocean 2026 H2 Market Report
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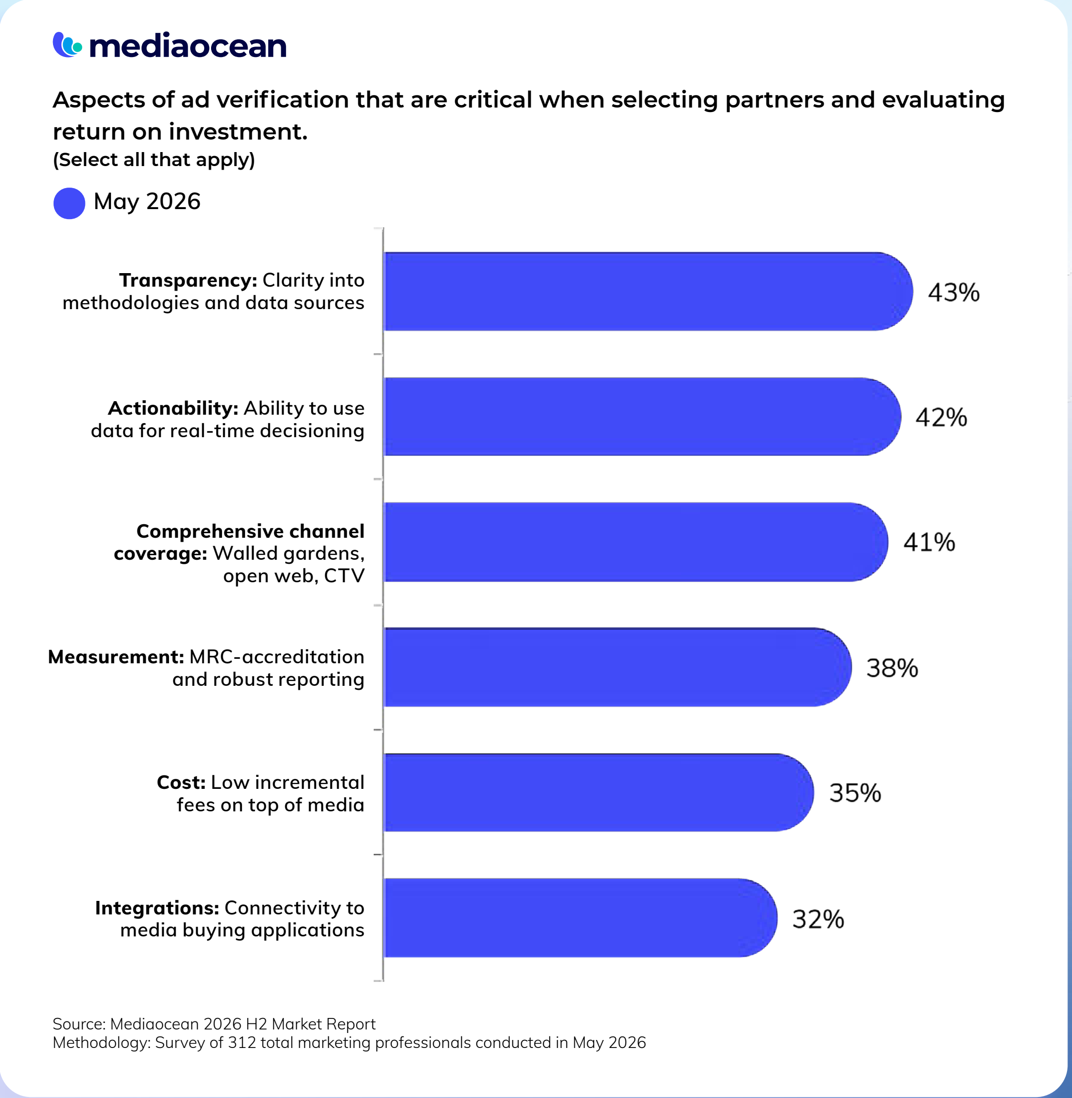
Insight 7

Transparency and actionability define the new standard for ad verification

Heading into the second half of the year, the industry has fundamentally revalued ad verification, moving away from passive oversight toward a standard defined by transparency and actionability. For 43% of respondents, Transparency into methodologies and data sources has emerged as the single most critical factor, signaling a definitive end to the era of "black box" verification models.

This demand for transparency is nearly tied with a need for immediate utility; 42% of marketers now prioritize Actionability and the ability to use verification data for real-time decisioning. In this new paradigm, data that only serves for passive post-campaign reporting is no longer sufficient; instead, it must be an active, integrated component of the live optimization process to be considered truly valuable.

This shift is further amplified by an omnichannel mandate, as 41% of the market requires partners capable of bridging the gap across walled gardens, open web, and CTV through Comprehensive Channel Coverage. While the fragmentation of the media mix has intensified, the standards for credibility remain high; 38% of respondents view MRC-accreditation and robust reporting as essential foundations, treating these traditional Measurement benchmarks as the non-negotiable "entry price" for any credible ROI evaluation.



Perhaps most telling of this maturation is the industry's clear preference for integrity over price. Low incremental fees are a lower priority for only 35% of the market, suggesting a widespread willingness to pay a premium for high-quality data that effectively protects both brand equity and budget.

However, for 32% of the industry, the final mile of value remains Integrations. In a high-velocity digital ecosystem, verification data is only as good as its ability to flow seamlessly into existing media buying applications, ensuring that protection and performance are baked directly into the execution of the strategy.

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Conclusion

As marketers focus on the remainder of 2026 and begin to look ahead at 2027, the industry is defined by a shift from broad-based investment toward strategic maturation. The industry's digital foundations have settled into a "core pillar" era where maturity is the standard. While innovation spend continues to flow toward AI media, legacy digital giants in Social and Search have transitioned into the immovable floor of the media mix.

Investment strategy is now anchored by a return to performance-driven fundamentals. While performance media remains the undisputed safe-haven strategy, the true growth lever for the coming year lies in the creative layer. By prioritizing creative testing and first-party data mastery, brands are successfully fortifying their own ecosystems and tech stacks to ensure their performance-led strategies remain resilient against shifting privacy and signal standards.

The narrative surrounding AI has moved decisively from theoretical hype to applied utility. We are seeing a standardization of the analytical core, with AI becoming a foundational requirement for modern reporting and creative versioning. However, a necessary "reality check" has emerged within daily workflows; marketers are adopting a more disciplined, step-by-step approach to integration as they encounter the friction of moving projects from pilot to production.

The era of autonomous marketing is taking shape through a guarded approach to AI agents. While early adopters are beginning to move into production, the broader market remains in an evaluative phase, focused on low-risk analytical tasks.

Scaling this autonomy into 2027 will require the industry to overcome significant governance barriers and establish the human-in-the-loop checkpoints necessary to balance speed with brand safety.

CTV's status as a powerhouse remains challenged by a persistent performance paradox. Despite its graduation to a "must-have" reach vehicle, a gap between investment and unified measurement persists, creating a frequency management crisis across fragmented apps. Solving these structural hurdles and eliminating data silos is now the primary objective for marketers who demand that the big screen offer the same precision as other digital formats.

Modernizing transaction workflows has led to a significant "spreadsheet exodus" as organizations prioritize automated execution to achieve strategic scale. By moving away from manual processes, teams are finally reclaiming the time necessary to refocus on high-impact sponsorships and creative excellence. This shift is building the operational trust and financial accuracy required to operate at the high velocity the current media ecosystem demands.

Finally, ad verification has reached a new standard defined by transparency and actionability. Marketers are permanently retiring opaque "black box" models in favor of methodologies that allow for real-time decisioning across an omnichannel mix. As we look ahead to 2027, success will favor those who have moved beyond simply adopting new tools and have instead orchestrated them into a unified, transparent, and truly future-ready ecosystem.

Methodology

This survey was conducted via SurveyMonkey in May 2026 and contains data from 312 respondents representing brands, agencies, media companies, measurement firms, tech platforms, and other marketing industry constituents.

Year-over-year and period-over-period comparisons are based on previous market reports, reflecting more than 6,400 total respondents, with the first published at the end of 2021.

Note: Values shown in graphs are rounded to the nearest whole number.

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