Research

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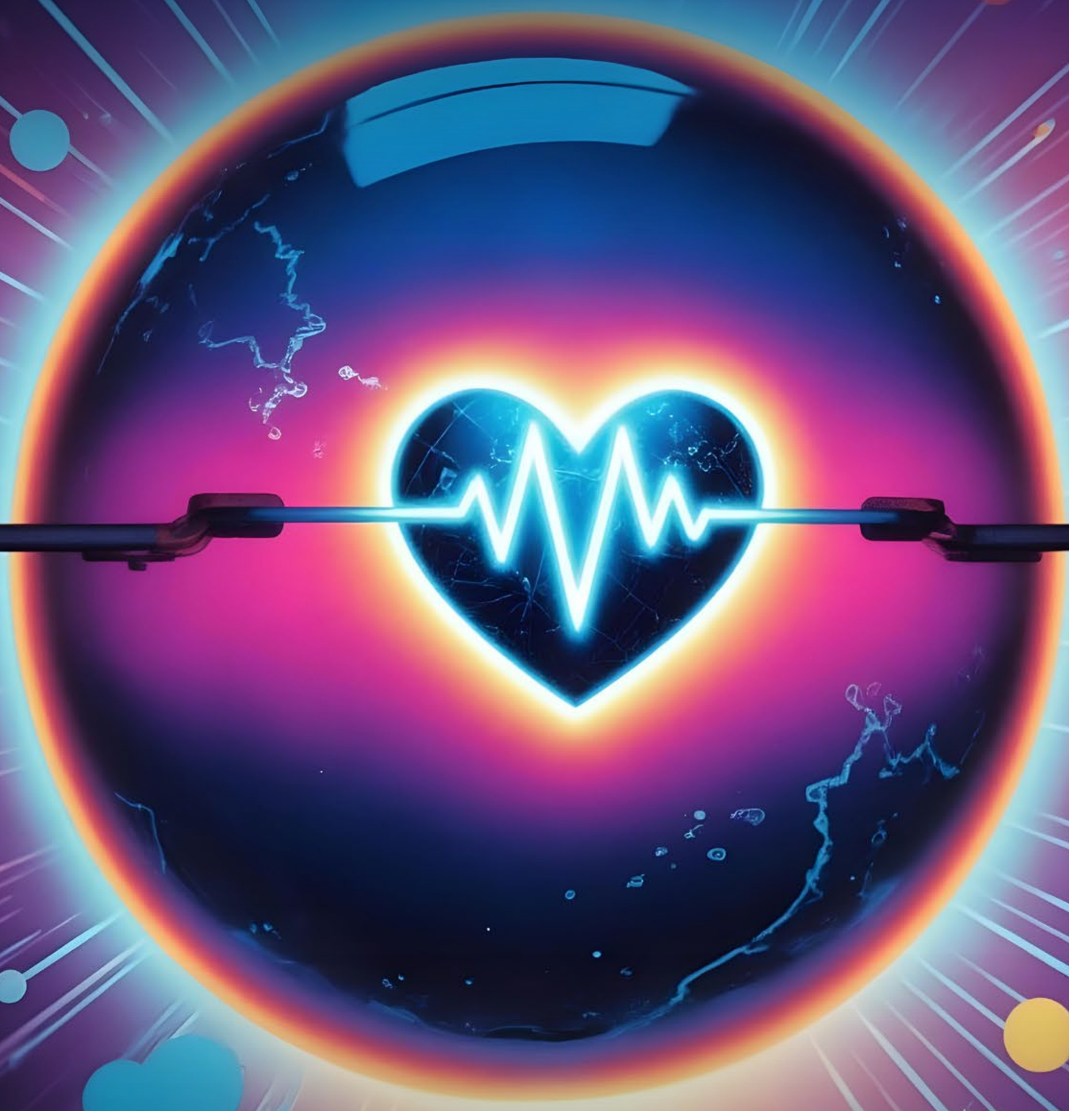

The ExchangeWire Media Pulse: H1 2026

Insights from ExchangeWire's global community

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Executive Summary

Media Pulse H1 2026 captures the collective voice of ExchangeWire's global community – a pulse check on the evolving landscape of media, marketing, and technology. Through weekly polls conducted across the second half of 2025, we gathered the thoughts, forecasts, and frustrations of our readers: the practitioners, innovators, and analysts shaping the future of advertising.

This edition distils those insights into three defining themes that dominated industry debate in H1 2026: AI, Ad Spend, and the AdTech Ecosystem. From the accelerating impact of agentic AI on the industry, market (and geopolitical) uncertainty, to the maturity of new formats, Media Pulse reflects a half-year of recalibration and redefinition.

With hundreds of responses from across regions and roles, the findings provide a snapshot of how the thinking of the ad tech industry evolved through a turbulent but potentially transformative period.

69% of respondents expect a continued upturn in marketing spend for Q2 2026

45% of workplaces have already begun implementing AI

H1 2026 — Key Takeaways

Positive Market Outlook for 2026:

Despite various industry shifts, there is a strong sense of confidence. Approximately **69% of respondents** expect a continued upturn in marketing spend for Q2 2026. Additionally, **90% of participants** plan to increase their retail media spend in the second half of 2026, and an equal percentage (90%) intended to increase ad spend around major events like the World Cup.

AI Dominates the Conversation:

AI is a central theme. While **45% of workplaces** have already begun implementing AI, there is significant concern regarding its impact on the creative industry. A striking **91% of respondents** believe lawmakers should do more to protect the rights of creatives from AI developers.

Social Media and CTV Spending Trends:

- **Social Media:** Instagram remains the primary destination for social media ad spend, capturing **62% of directed budgets**, followed by Facebook at 21% and TikTok at 17%.
- **CTV (Connected TV):** The outlook for CTV is generally positive, with **54% of respondents** reporting that their or their clients' CTV budgets are increasing over the next 12 months.

Year-on-year evaluation

The data shows a clear evolution in industry priorities:

2024: Focused heavily on the loss of third-party cookies and the initial rise of AI.

2025: Shifted toward practical AI implementation and managing fragmentation in the CTV landscape.

2026: Currently emphasises regulatory protections, ad measurement confidence (70% feeling more confident), and strategic spending around major global events.

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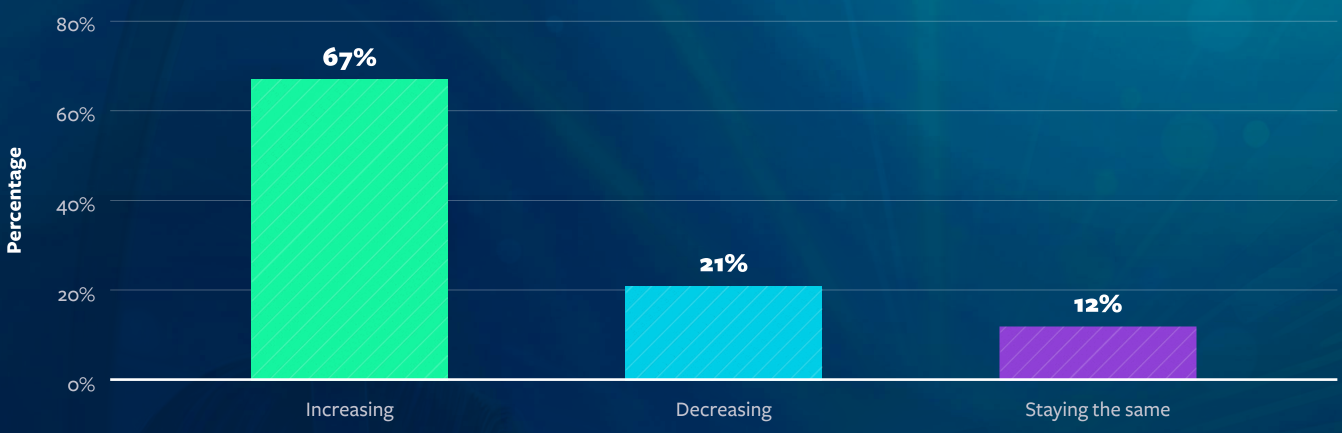
Ad Spend: plans and priorities

New Year's Resolutions

Figure 1: Planned ad spend for 2026 vs 2025

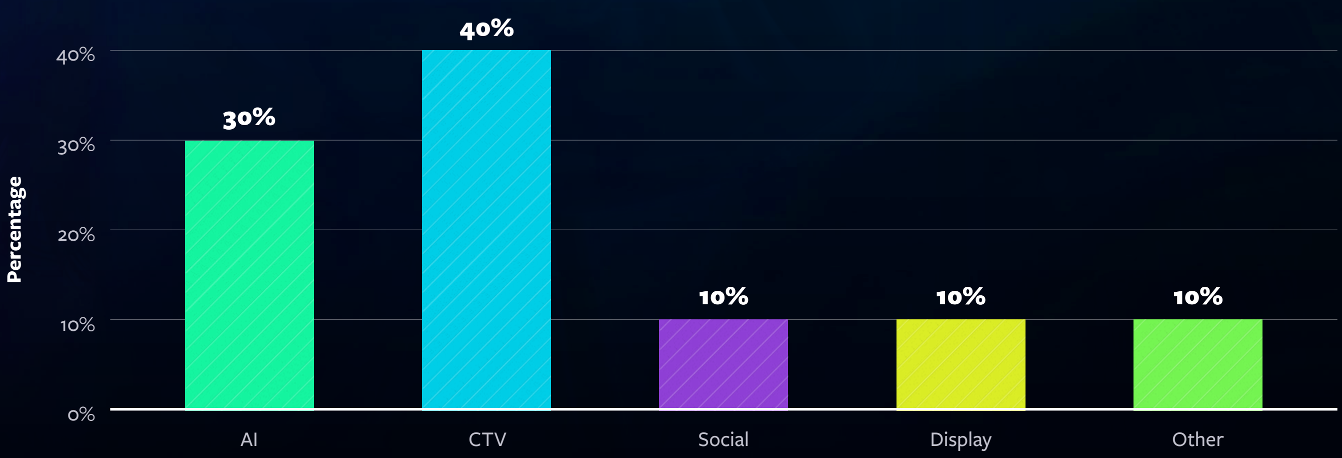


At the start of the year, we asked **How does your planned ad spend for 2026 compare to 2025?**. The data revealed a strong bullish sentiment among advertisers for 2026; **a significant 67% of respondents planned to increase their ad spend** compared to the previous year. Conversely, **only 21% anticipated making cuts**, while **12% expected their budgets to remain stable**. The substantial majority favouring growth indicates that digital and traditional channels alike may see increased demand, potentially driving up advertising costs across various platforms in the coming year.

Where's that spend going?

We asked **'Where will you be spending most in 2026?'**. **40% of respondents identified CTV** as their top spending area. **AI-driven initiatives follow closely at 30%**, signaling a major shift toward automated and intelligent marketing solutions. Interestingly, traditional heavyweights like **Social and Display media each only command 10% of the top-spend priority**, matching the 'Other' category. This shift suggests that advertisers are prioritising high-engagement, big-screen digital experiences and the efficiency of AI over conventional social media placements.

Figure 2: Spending priorities in 2026

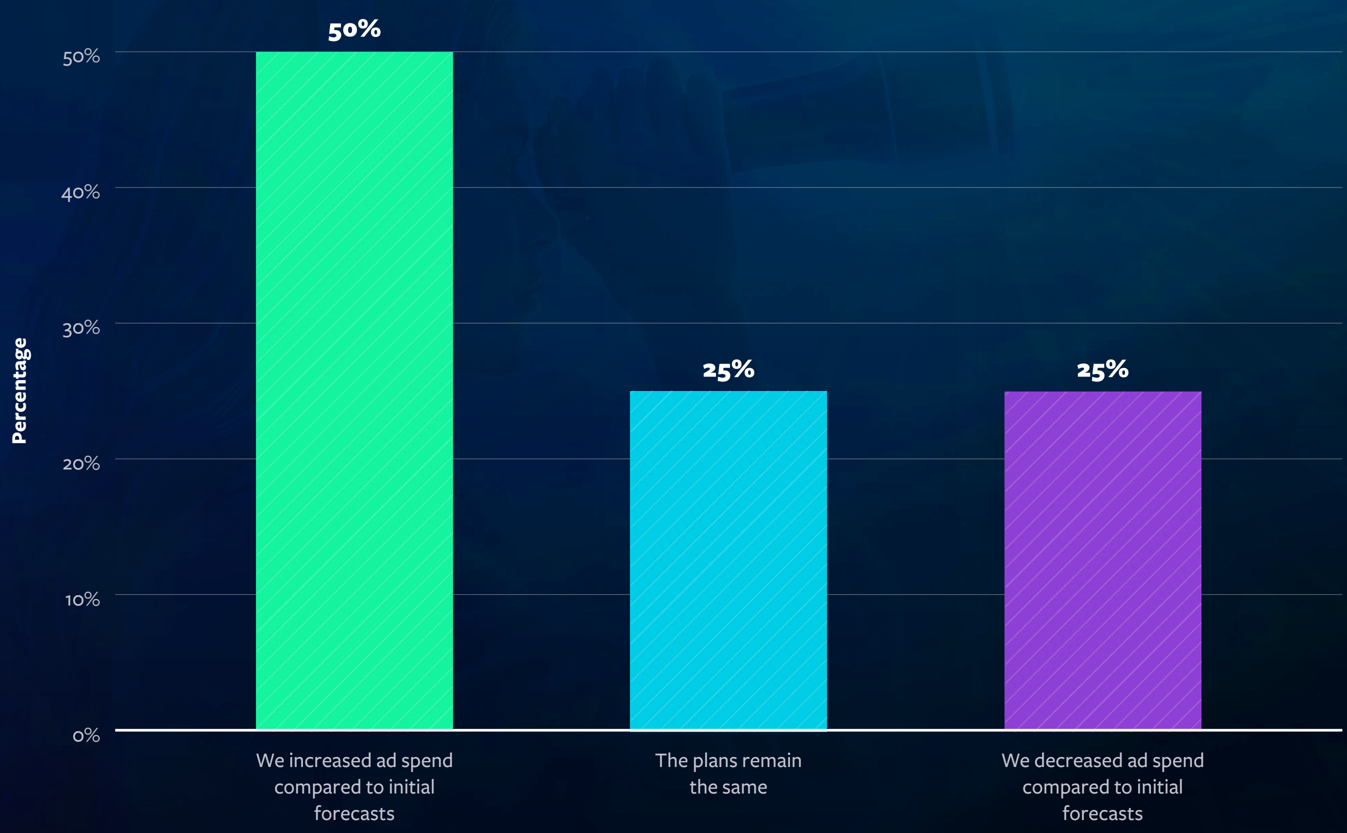


Plans at the end of H1

At the midpoint of the year, spending plans had largely trended upward or remained stable.

50% reported increasing their ad spend compared to their initial forecasts, indicating that performance or market conditions exceeded expectations. **25% have kept their plans the same**, while the remaining **25% have decreased their spend**. This suggests that for the majority (75%), the first half of the year was either as planned or better than expected. The high rate of upward revision reinforces the initial positive sentiment for 2026, as brands react to positive early-year results with increased investment.

Figure 3: Change in spending plans



50% of respondents reported increasing their ad spend compared to their initial forecasts,

25% have kept their plans the same, while the remaining 25% have decreased their spend

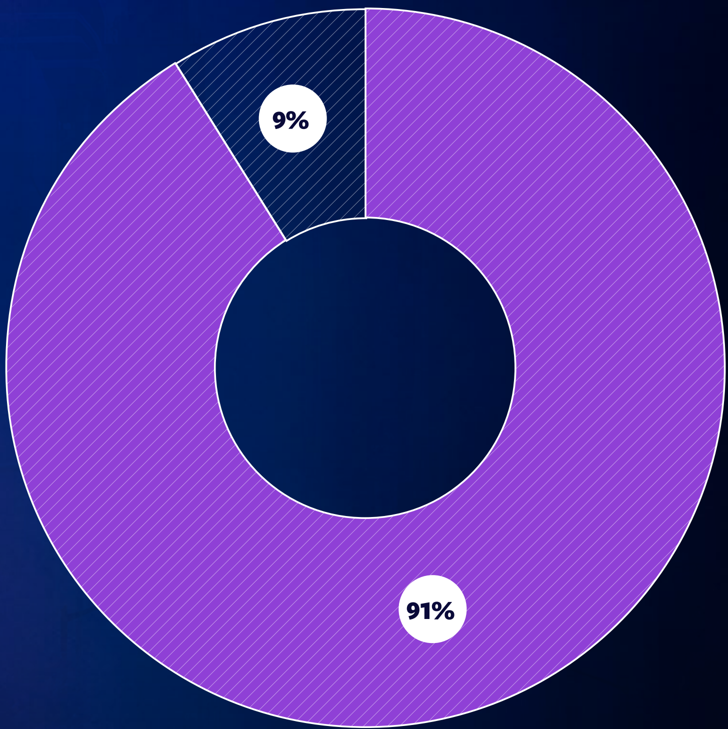
The Impact of AI

Creative rights

There is an overwhelming consensus regarding the need for legislative intervention in the AI space, with 91% of respondents stating that lawmakers 'definitely' need to do more to protect creative rights. This reflects a deep-seated concern within the industry that the creative workforce is at significant risk from AI development.

A small minority of 9% supports more regulation but doesn't perceive an immediate danger, while 0% believe developers should have unfettered rights to train models on any material. This unified stance highlights a critical tension between rapid technological advancement and the preservation of intellectual property and human creativity.

Figure 4: Protecting creative rights from AI



DEFINITELY, THE CREATIVE INDUSTRY IS AT RISK

THERE SHOULD BE MORE REGULATIONS, BUT THE CREATIVE INDUSTRY IS NOT IN DANGER

91% of respondents state that lawmakers 'definitely' need to do more to protect creative rights

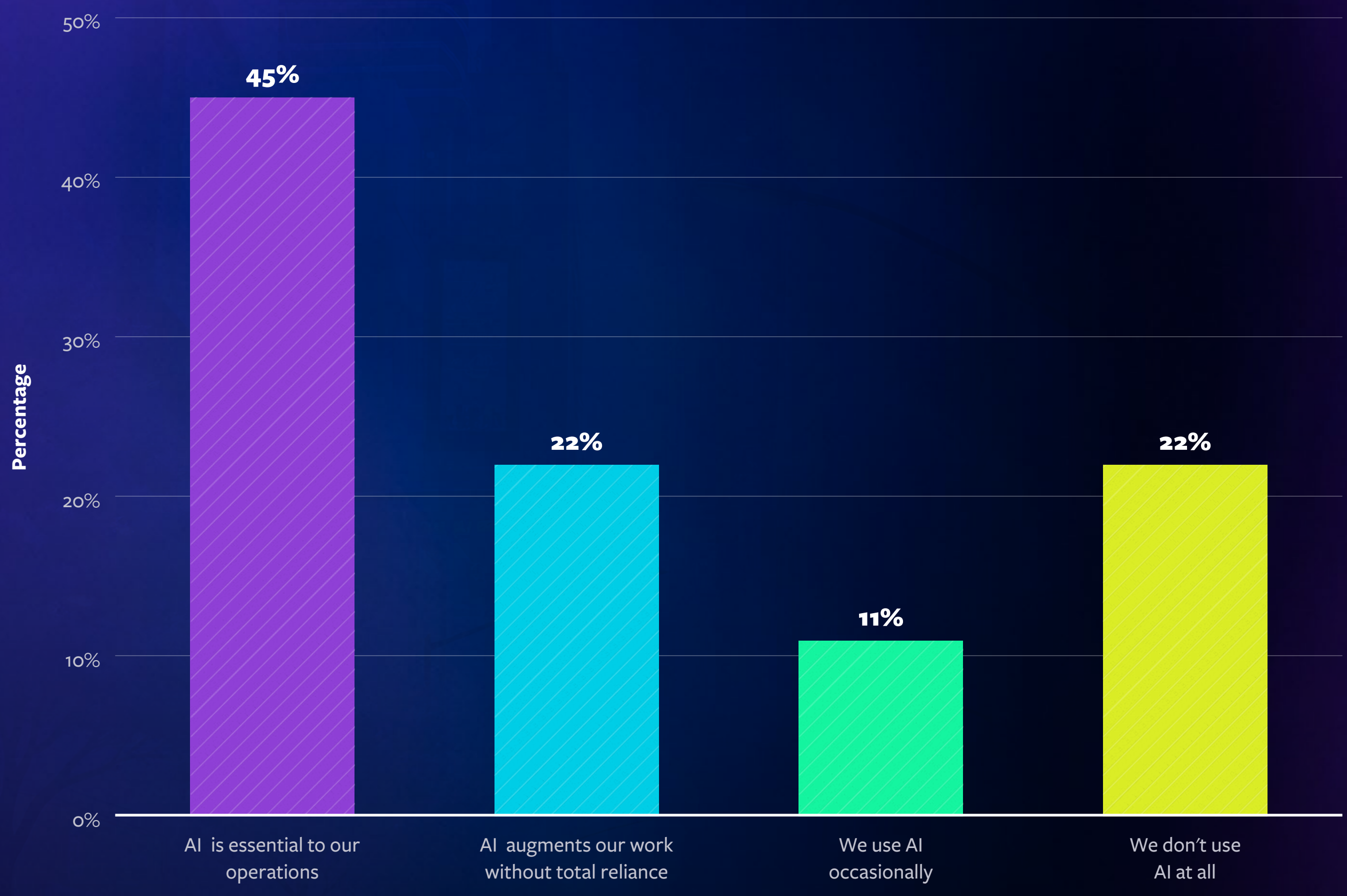
9% of respondents support more regulation, but don't perceive an immediate danger

How far along is AI adoption?

AI adoption in the workplace has reached a critical tipping point, with 45% of respondents considering AI 'essential' to their operations. Another 22% use AI to augment their work without total reliance, and 11% use it occasionally.

Combined, 78% of workplaces have integrated AI to some degree. However, a notable 22% still do not use AI at all, indicating a divide between early adopters and those hesitant to embrace the technology. The high percentage of 'essential' users suggests that AI is no longer just a trend but a core component of modern business strategy and operational efficiency.

Figure 5: Workplace AI implementation



45% of respondents consider AI 'essential' to their operations

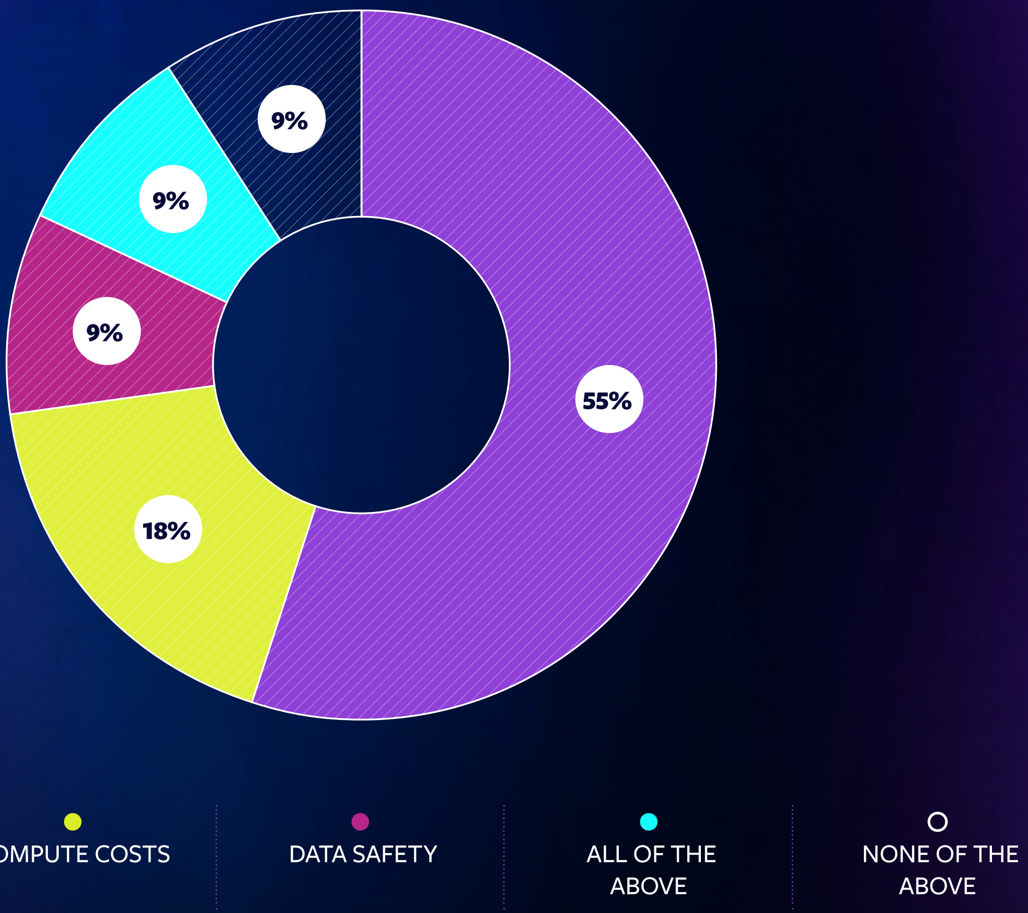
22% of respondents still do not use AI at all

Biggest AI concerns

Reliability stands out as the primary concern for business users adopting AI, cited by 55% of respondents. This underscores the industry's need for accurate, consistent, and hallucination-free outputs before fully trusting AI for critical tasks.

Compute costs are the second largest concern at 18%, highlighting the financial barriers to scaling AI solutions. Data safety, a common talking point, was only the top concern for 9%, equal to those who are concerned about 'all' or 'none' of the factors. This suggests that while security is important, the practical utility and cost-effectiveness of AI are the current priorities for businesses.

Figure 6: AI concerns for specific industry use cases



55% of respondents cited reliability as the primary concern for business users adopting AI

91% of respondents state that lawmakers 'definitely' need to do more to protect creative rights

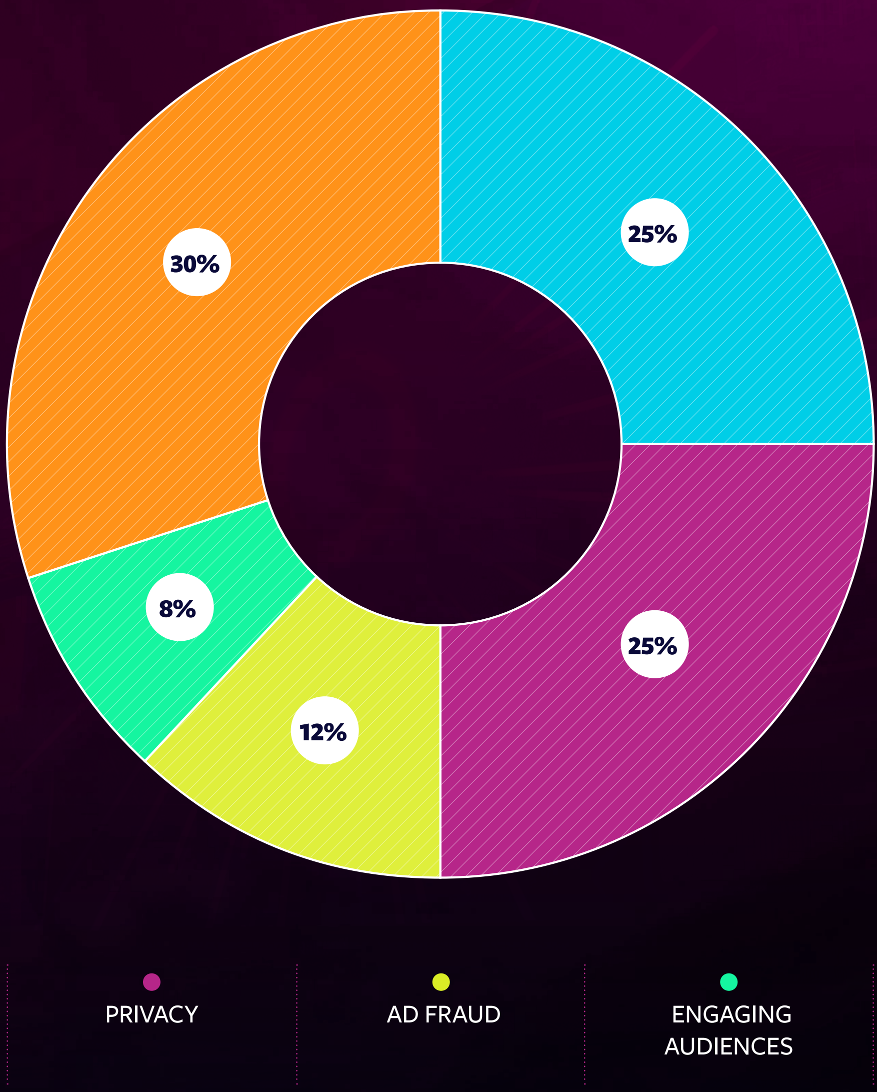
The Advertising Ecosystem

2026's biggest challenges

As we entered H2 2026, budget constraints emerged as the primary concern, capturing 30% of the focus.

Measurement and privacy follow closely, tied at 25% each, indicating significant operational and regulatory hurdles. Meanwhile, ad fraud and engaging audiences present lesser but notable challenges, highlighting a shift towards foundational financial stability.

Figure 7: Biggest Challenge in Q2 2026



30% of respondents cited budget constraints as the primary concern

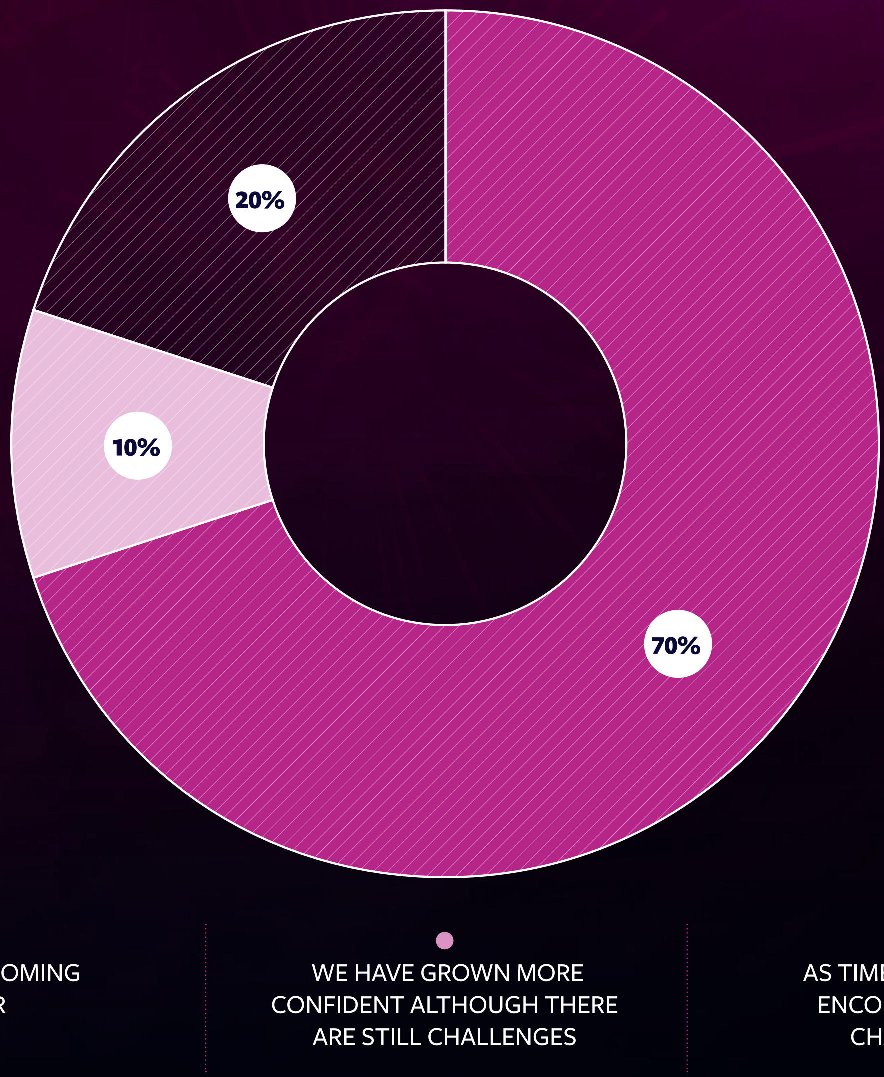
25% of respondents cited measurement and privacy as joint second most significant concern

Confidence in measurement

Confidence in ad measurement is on the rise, with 70% of respondents stating that it is becoming easier. This likely reflects improvements in attribution technology and data analytics tools. However, the path isn't entirely smooth; 10% have grown more confident but still acknowledge significant challenges, and 20% feel that they are encountering more challenges as time goes on.

This 30% minority indicates that privacy regulations and the deprecation of cookies continue to complicate the landscape for some. Overall, the trend is positive, suggesting that the industry is successfully adapting to new measurement paradigms despite ongoing technical hurdles.

Figure 8: Confidence in ad measurement

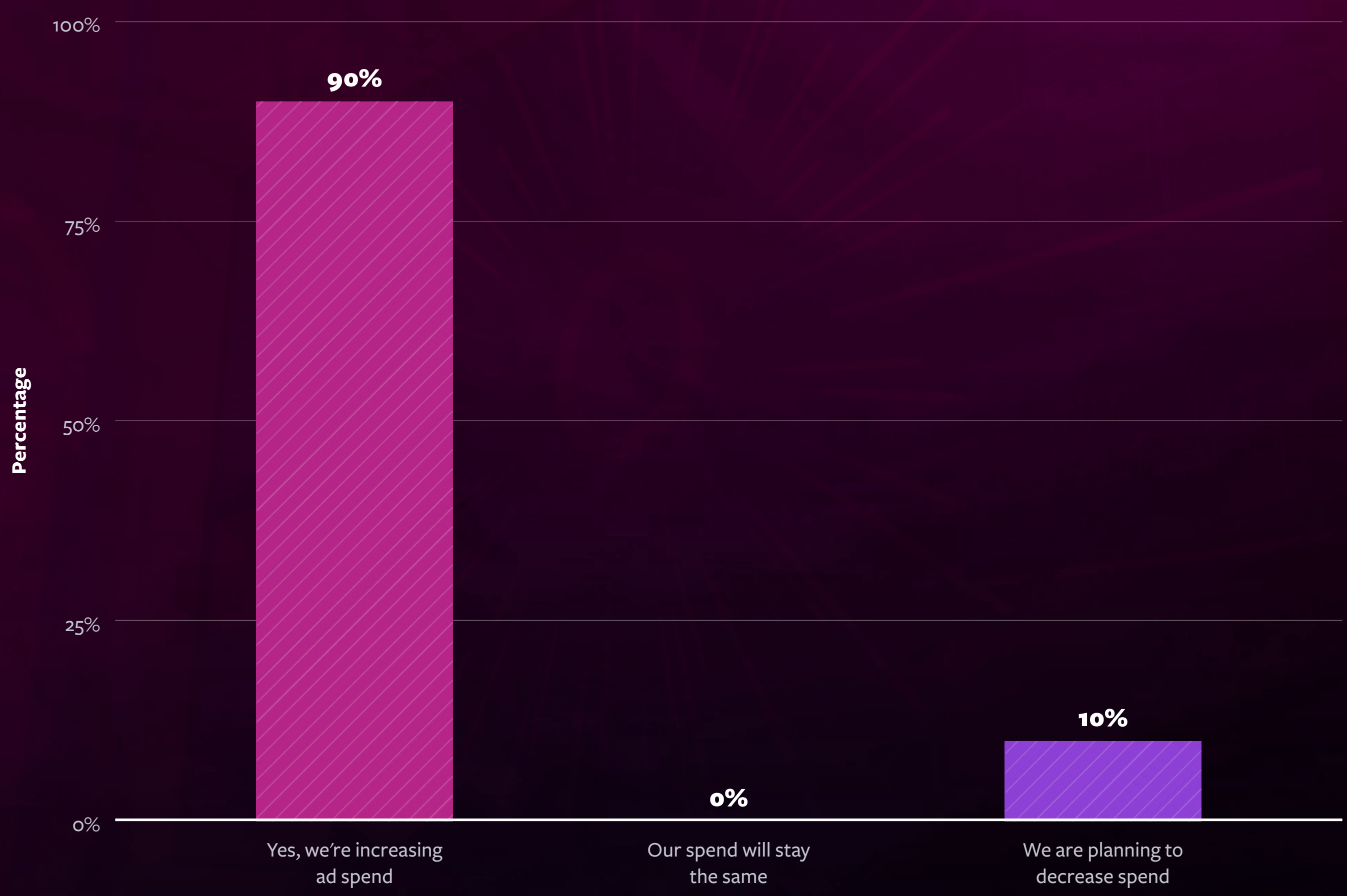


Retail media spend

Retail media is poised for explosive growth in the latter half of 2026, with an overwhelming 90% of respondents planning to increase their spend in this category. This massive shift highlights the growing importance of 'bottom-of-the-funnel' advertising and the value of first-party retailer data.

Only 10% plan to decrease their spend, and 0% intend to keep it the same. This near-unanimous move toward retail media suggests that brands are increasingly prioritizing placements that are closer to the point of purchase, seeking higher conversion rates and more direct measurement of their advertising impact on actual sales.

Figure 9: Retail media spend in H2 2026



90% of respondents are planning to increase their spend in retail media

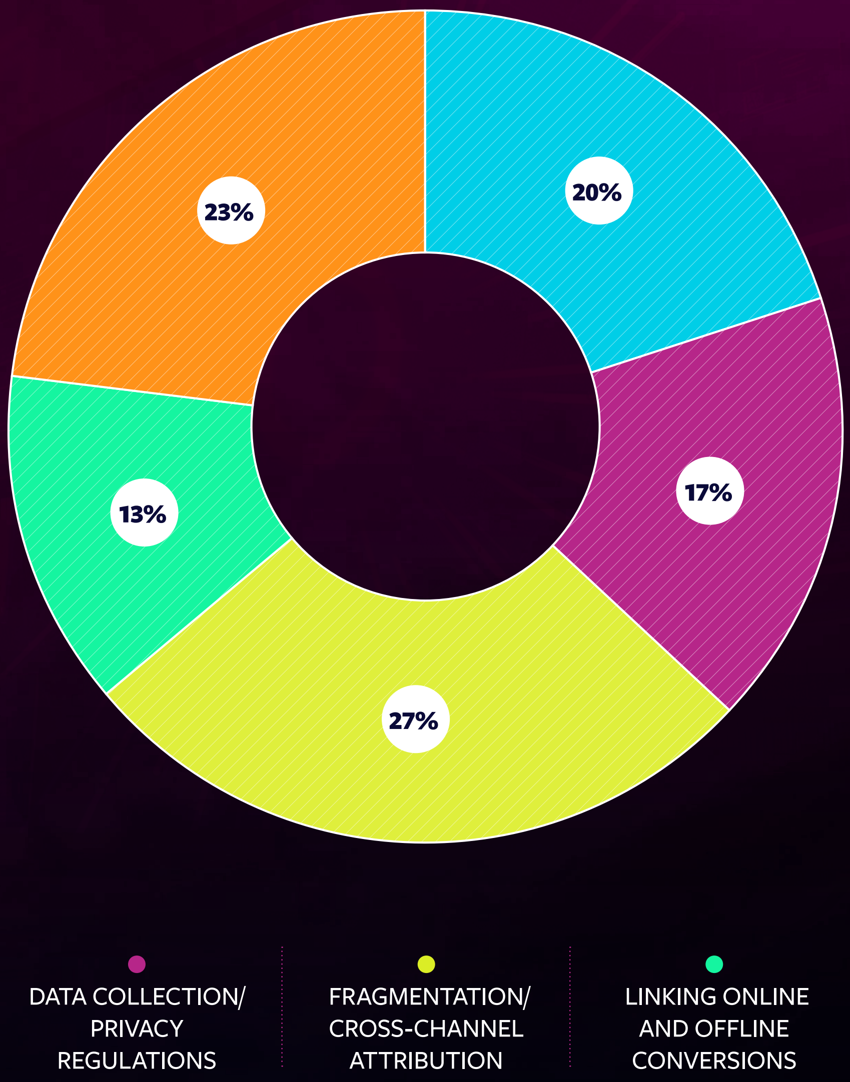
10% of respondents are planning to decrease their spend

Streaming spend

Turning our attention to measurement, we asked the industry what was its biggest challenge in campaign measurement currently?

27% respondents said their biggest challenge when it comes to campaign measurement was fragmentation/cross-channel attribution. 23% reported that their biggest challenge was measuring short-term vs long-term impact. 20% saw data accuracy as the biggest barrier, while 17% saw it as data collection/privacy regulations. Only 13% find linking online and offline conversions to be the biggest challenge.

Figure 10: Biggest challenge in campaign measurement

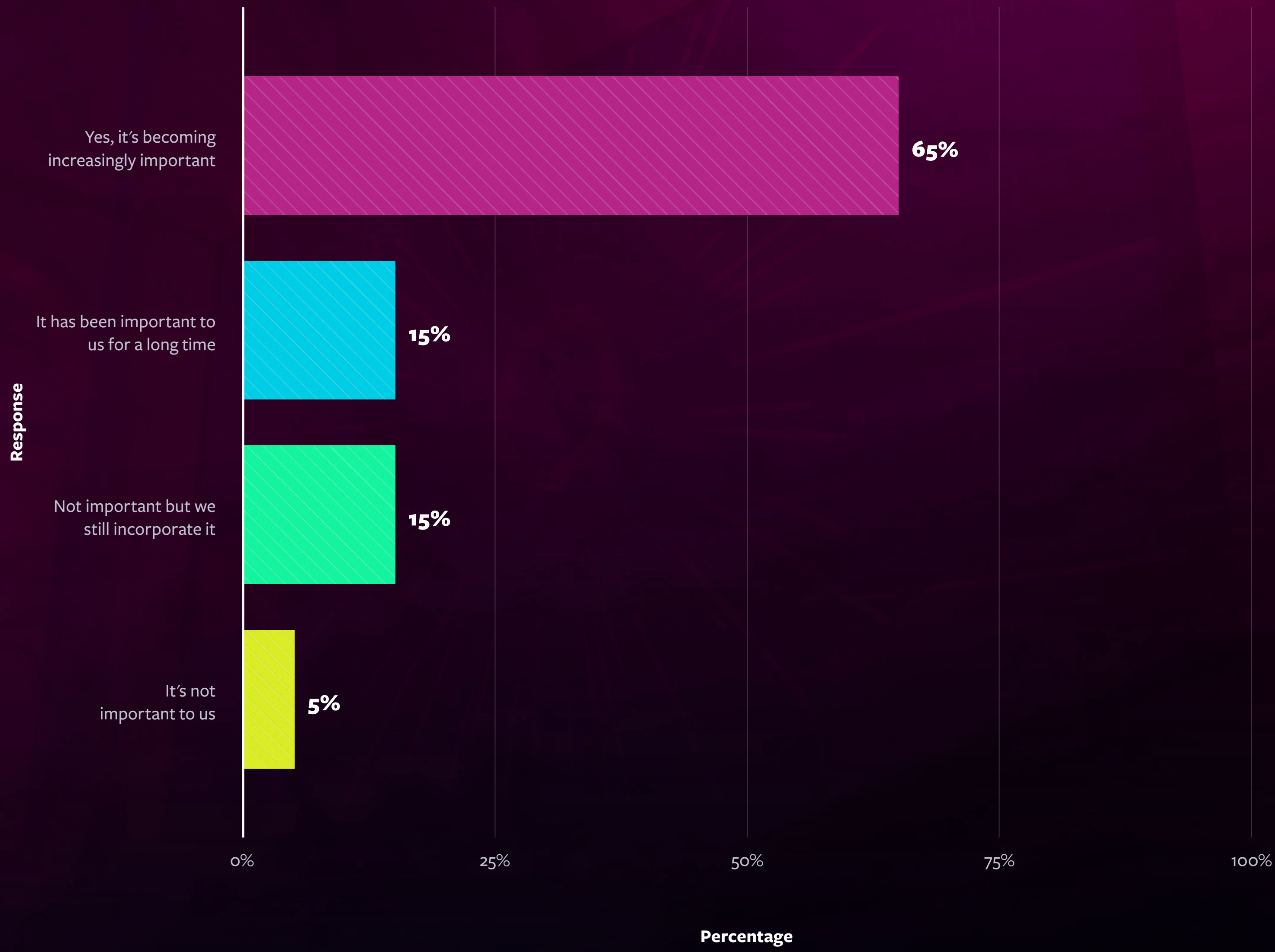


The rise of the influencer

There's no mistaking the importance of influencer marketing.

65% of respondents stating it is becoming increasingly important in omnichannel campaigns and 15% noting its long-standing significance. While 15% incorporate influencers despite viewing them as unimportant, a mere 5% deem them completely irrelevant, highlighting the rapidly growing dominance of modern influencer strategies today.

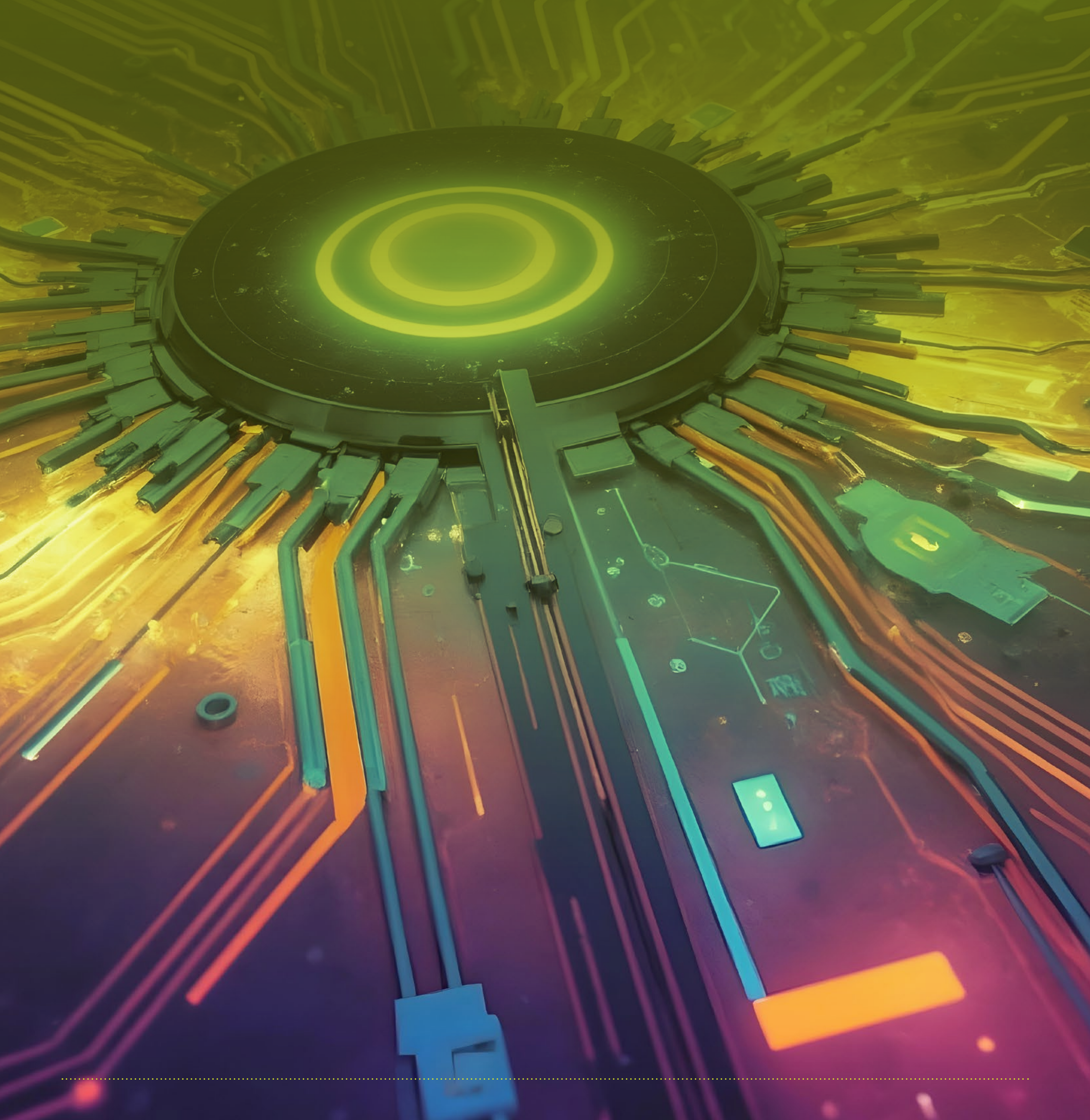
Figure 11: Importance of Influencer Marketing in Omnichannel Campaigns



65% of respondents state influencer marketing is becoming increasingly important in omnichannel campaigns

15% of respondents incorporate influencers despite viewing them as unimportant

H1 2026: the issues

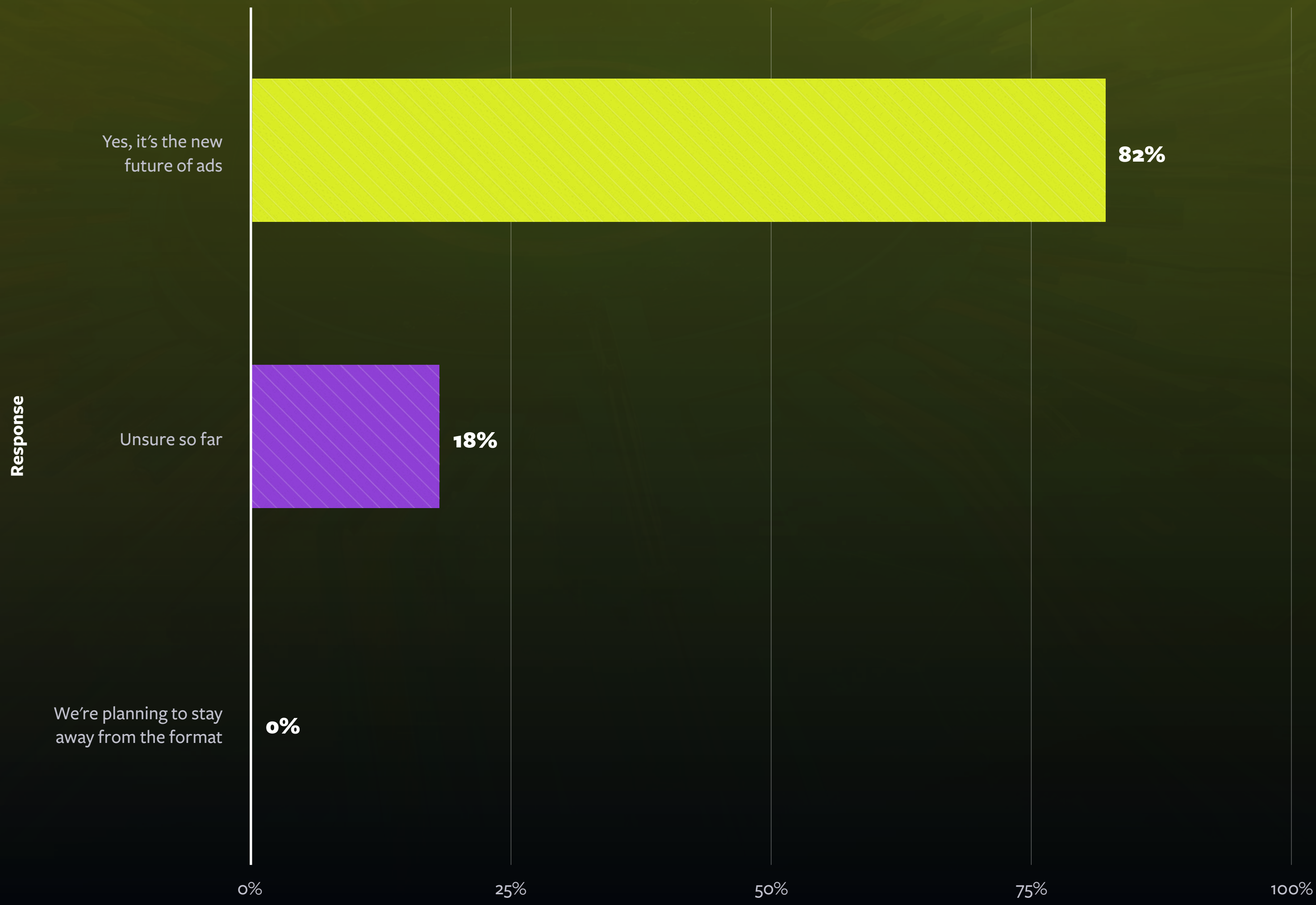


Advertising in chat: is it the future?

The data reveals strong optimism regarding the integration of Large Language Models (LLMs) into advertising. An overwhelming 82% of respondents believe LLMs represent the future of ads, indicating widespread excitement.

Meanwhile, 18% remain unsure, and notably, zero respondents plan to avoid the format. This suggests a highly receptive market.

Figure 12: Excitement for Displaying Ads through LLMS



82% of respondents believe LLMs represent the future of ads, indicating widespread excitement

0% of respondents plan to avoid the format

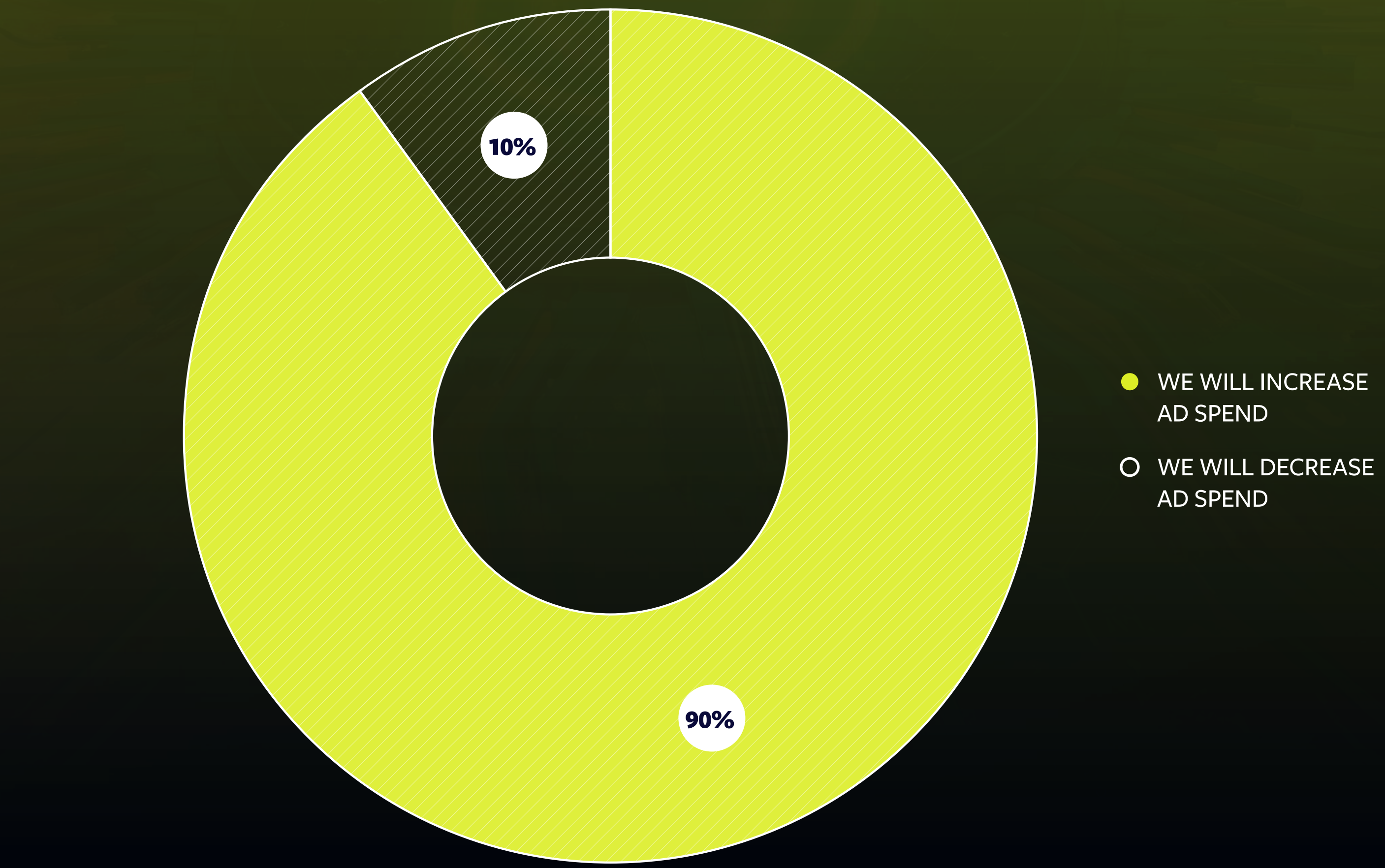
The World Cup

The World Cup remains a premier driver for advertising investment, with 90% of respondents planning to increase their ad spend around the event. This underscores the tournament's status as a global cultural phenomenon that offers unparalleled reach and engagement opportunities.

Similar to the retail media trend, only 10% plan to decrease spend, while 0% will maintain current levels.

This indicates that the World Cup is viewed as a critical 'must-win' moment for brands, justifying significant budget reallocations or additional investments to capture the attention of a massive, highly engaged global audience during the competition.

Figure 13: World Cup ad spend



90% of respondents plan to increase their ad spend around the event

10% of respondents plan to decrease spend

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The business of media, marketing and commerce

About ExchangeWire

ExchangeWire provides news and analysis on the business of media, marketing and commerce with a specific focus on data and technology.

We offer actionable market intelligence on the trends and innovations that are shaping the media, marketing and commerce industries. We're always interested in any technology and business-related news globally, and in particular across EMEA and APAC. Relevant companies are encouraged to get in touch. We're also interested in hearing from PR people working with companies in any of the areas named above.

For more information, please visit www.exchangewire.com

Upcoming ExchangeWire Events

Our attendees experience first-hand the latest trends and innovations in advertising and marketing technology, engaging in insightful discussions, networking, and exploring cutting-edge solutions to shape the future of ad tech and martech.

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