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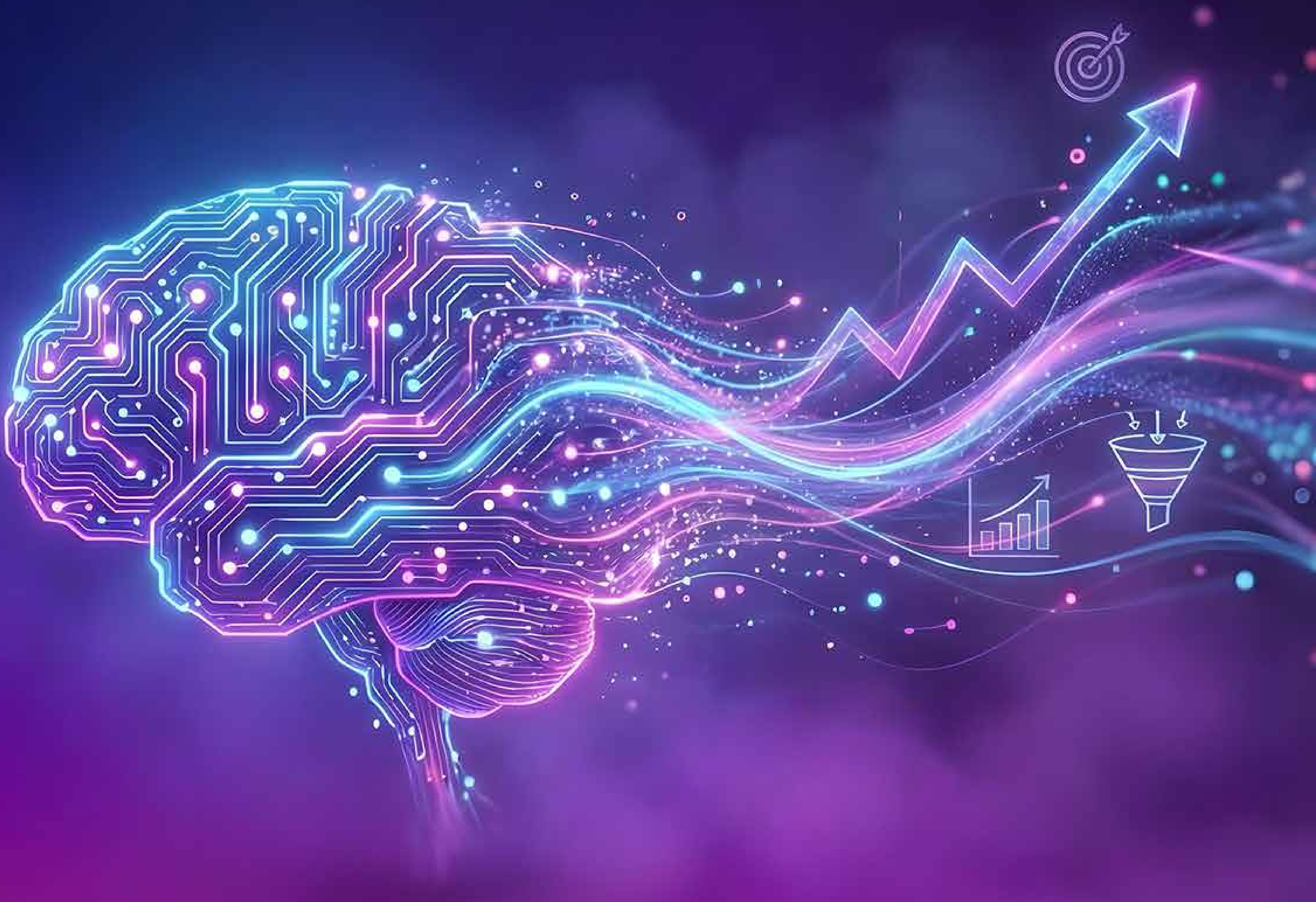
PRESENT 6TH EDITION OF

DRIVERS OF GROWTH SURVEY

Strategic priorities for CMOs in 2026



ABOUT DRIVERS OF GROWTH SURVEY 2026

The **6th edition of the annual Drivers of Growth Survey** explores the growth opportunities, strategic priorities, and challenges facing Indian marketing leaders as they prepare for 2026.

The survey captures insights from senior marketing leaders across industries to understand how they are navigating economic shifts, evolving consumer behaviour, and rapid technological change while planning for sustainable business growth in the year ahead.

Aligned with the **2026 theme "The Bold Front,"** the survey highlights how CMOs are making bolder strategic choices - strengthening performance marketing, accelerating the role of commerce media, and leveraging AI and GenAI to drive measurable impact across media, content, and search.

FOREWORD

Marketing in India is entering a phase of sharper discipline and deeper integration. The 2026 edition of Drivers of Growth reflects an industry that is not only transforming, but recalibrating how growth is defined, pursued, and measured. Insights from over 70 senior marketing leaders across sectors point to a common reality: expectations from marketing are rising even as the environment in which it operates becomes more complex.

India's structural growth momentum remains intact this year, yet the conditions shaping marketing decisions are more exacting than before. Demand signals are uneven, competitive intensity is accelerating, and investment scrutiny has strengthened. As organisations balance expansion with profitability discipline, marketing is increasingly expected to deliver demonstrable business impact with far greater precision and accountability.

In response, a clear reorientation is underway. Investments are consolidating around high-intent digital ecosystems - particularly social, video, and retail media - where discovery, influence, and transaction increasingly converge. Brand and commerce are no longer sequential objectives but interconnected outcomes within the same customer journey, reshaping how marketers design reach, engagement, and conversion strategies.

At the same time, Artificial Intelligence is advancing from experimental adoption to operational capability across content, media optimisation, and customer experience. Yet even as technological capability expands, marketers continue to navigate fragmented journeys, evolving privacy norms, and persistent attribution complexity - reinforcing the need for strong first-party data foundations and integrated martech architecture.

Taken together, these shifts signal a marketing landscape that is more performance-anchored, technology-embedded, and commercially accountable than at any point in its evolution. We hope the perspectives in this report help marketers interpret these changes with clarity, make confident strategic choices, and unlock the next phase of growth in India's dynamic market.

We extend our sincere thanks to the marketing leaders who contributed their perspectives to this edition. Their candour in sharing priorities, constraints, and decisions makes this report a grounded reflection of the industry's collective direction.

JASWANT SINGH
Country Managing Director, ad:tech

FOREWORD

Over the last five editions, Drivers of Growth has given us a chance to pause and take stock of where marketing is headed. This year, that feels especially important.

We are at an inflection point where growth is no longer just about expansion, but about making better decisions in a more demanding environment. Marketers today have more platforms, more data, and more tools, and with them, more pressure than ever before. In theory, that should make growth easier to unlock.

The challenge is being clear on whether marketing is creating real business momentum or simply adding more activity. That means knowing where to invest, what to prioritise, what to measure, and just as importantly, what to ignore. In a market shaped by fragmented attention, shifting consumer behaviour, and constant change, clarity has become one of the most valuable advantages of a business.

This is particularly true in India. Consumers are discovering brands across a far wider set of touchpoints, their journeys are less predictable, and their expectations are higher. The gap between brand building and business outcomes is narrowing. In that environment, there is very little room for weak strategy or disconnected execution.

What is encouraging is that there is a more grounded view of growth today than there was a few years ago. There is more seriousness around measurement, more realism about attribution, and a clearer understanding that performance, brand, commerce, and customer experience cannot be treated as separate conversations anymore. AI is naturally becoming part of this shift. But like any important technology, its value will come from application rather than mere excitement.

At Tyroo, we have always believed that growth is strongest when it is built with both ambition and intent. Ambition to move faster and build bigger. Intent to understand markets properly, make smarter trade-offs, and stay close to what is actually changing on the ground. That balance matters even more now.

The next phase of marketing will be shaped by who stays focused, adapts with discipline, and builds systems that create lasting value.

I would like to thank all the marketers and industry leaders who contributed to this edition of Drivers of Growth. Their perspectives have helped make this report timely, grounded, and useful for anyone thinking seriously about what growth will require in 2026 and beyond.

SIDDHARTH PURI
Founder & CEO, tyroo

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IN THIS REPORT

KEY INSIGHTS 2026

Business confidence stabilises in 2026 with a more performance-driven mindset. While optimism softens slightly, revenue expectations rebound strongly, signalling renewed growth intent with sharper ROI accountability.

Media and marketing strategies are consolidating around social, video, retail media, and creator ecosystems, as brands move closer to engagement, commerce, and measurable outcomes. In parallel, AI and GenAI shift from experimentation to applied execution across content, media optimisation, and customer experience.

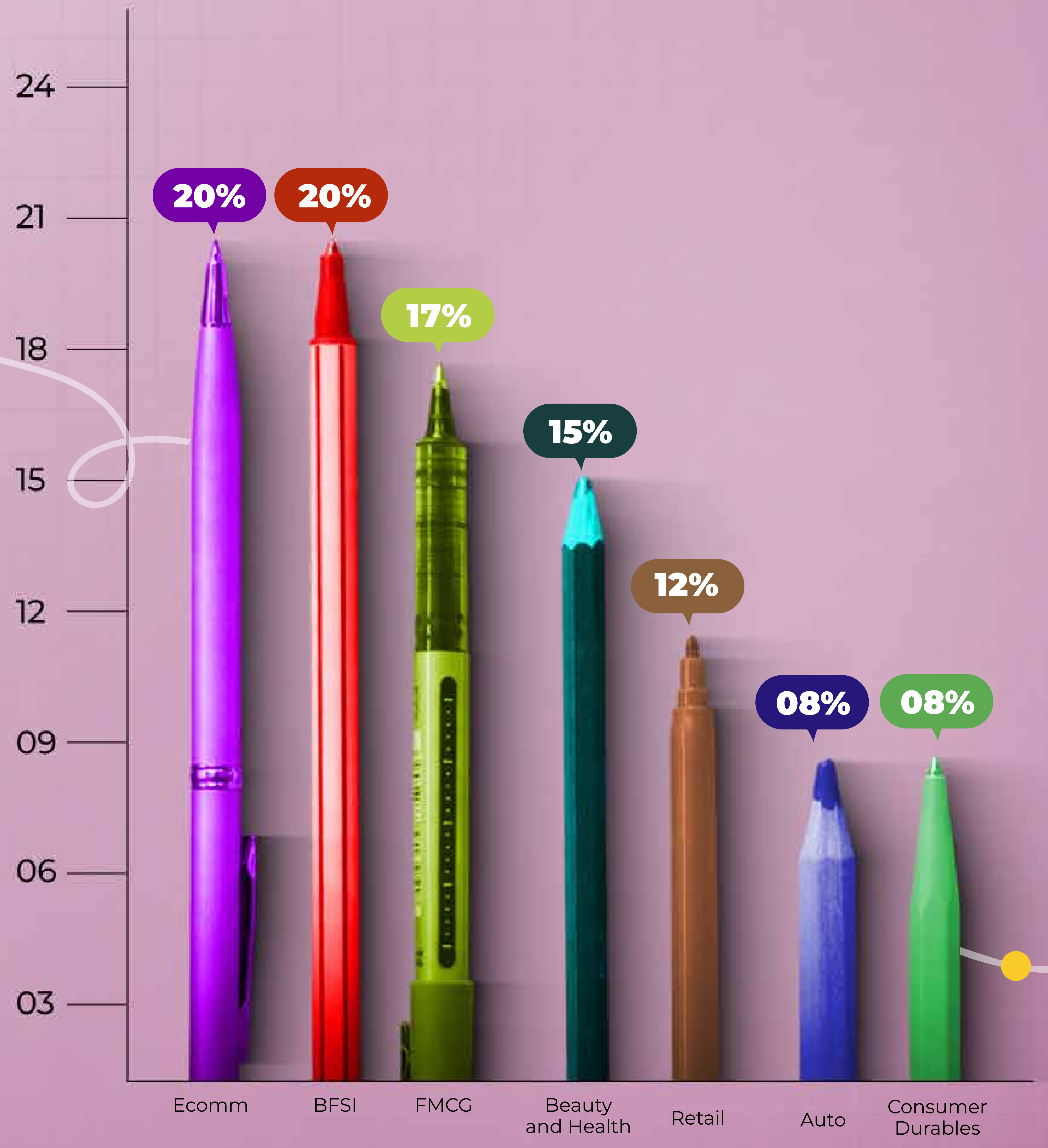
In an increasingly fragmented and privacy-constrained landscape, competitive advantage is being shaped by martech maturity, first-party data, and the ability to deliver connected, full-funnel impact across acquisition, commerce, and retention.

KEY INSIGHTS 2026

- 67% of marketers plan to increase spends in 2026, signalling cautious budget recovery after 2025 with stronger ROI accountability.
- Social media overtakes search to lead performance marketing (92% vs 78%), reinforcing the shift to content-led, engagement-driven acquisition.
- Retail media now commands 22% of media budgets (+15% YoY), emerging as a full-funnel, conversion-proximate growth driver.
- CTV adoption accelerates sharply (63% increasing spends vs 43% in 2025), becoming central to cross-channel video strategy.
- Customer experience (67%), media ROI (54%), and eCommerce capability (52%) rank as the top strategic priorities for 2026.
- Marketing remains acquisition-heavy (67%), but retention channels like WhatsApp/chatbots lead loyalty at 72% usage.
- AI/GenAI moves into applied marketing use, led by content generation, automation, and analytics — though 55% still allocate only 1–5% budgets.
- Attribution fragmentation persists as the #1 challenge (52% cite incomplete journeys), making measurement and martech maturity critical growth enablers.

PROFILE OF PARTICIPATING MARKETERS

80+ Senior marketing leaders from diverse industries participated in the 6th annual Drivers of Growth Survey, sharing insights on the priorities and challenges shaping marketing strategies today. Their collective perspectives offer a snapshot of the decisions and approaches driving growth in an increasingly performance-led landscape.



SECTION 1
MACRO AND GROWTH OUTLOOK

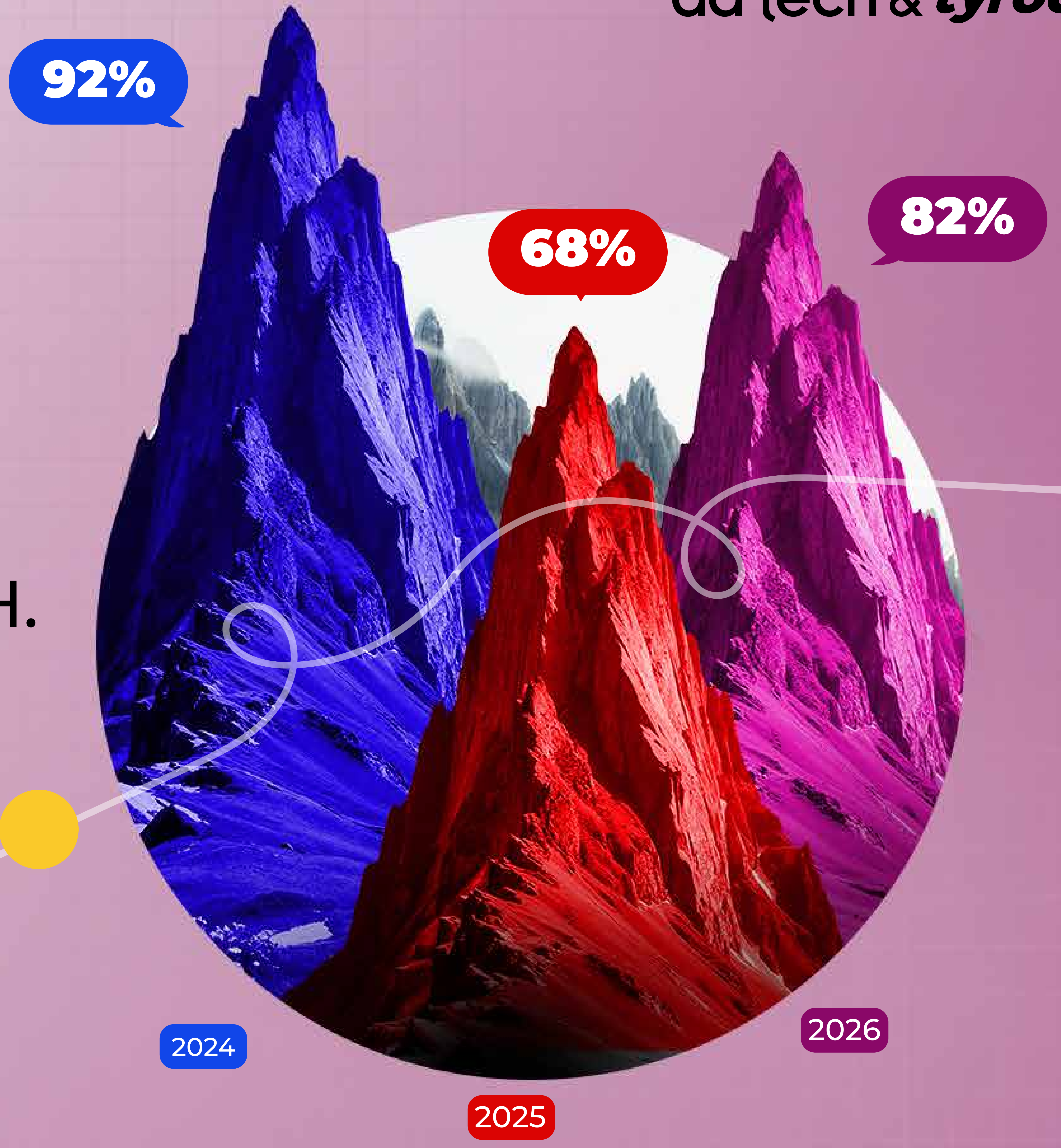
MARKETERS OPTIMISM & BUSINESS OUTLOOK IN 2026

CONFIDENCE REBOUNDS, BUT WITH A MEASURED APPROACH.

70% of marketers are optimistic about the economy for 2026 - slightly lower than the last 2 years, signaling a more performance-led mindset.

82% expect revenue growth, a strong increase after the cautious outlook in 2025.

After 2024's peak confidence and last year's strategic slowdown, marketers are entering 2026 with sharper priorities, smarter investments, and a focus on scalable returns.



KEY CHALLENGES
MARKETERS ANTICIPATE IN 2026

Marketers expect 2026 to be shaped by global uncertainty, rapidly evolving technology, and increasingly fragmented consumer and media ecosystems. The biggest challenges cut across **macro forces and day-to-day marketing execution**:

- **Measuring impact and ROI across channels,** as attribution becomes more complex in a fragmented, multi-platform media landscape.
- **Keeping pace with rapid technology evolution and emerging channels,** from GenAI and CTV to gaming, quick commerce, D2C, and new social environments.
- **Geopolitical and trade instability,** impacting costs, market access, and long-term strategic planning.
- **Economic pressure on consumers,** with inflation and shifting confidence influencing spending behaviour and demand predictability.
- **Rapidly shifting consumer behaviour and engagement patterns,** increasing the need for personalization, agility, and faster optimisation.
- **Managing budget volatility and rising media costs,** alongside growing media and audience fragmentation.
- **Navigating regulatory and data privacy requirements,** as compliance expectations continue to evolve.

In 2026, marketers will need to balance **innovation with measurement rigor**, navigate uncertainty with agility, and stay closely attuned to changing consumer realities to drive sustainable growth and resilience.

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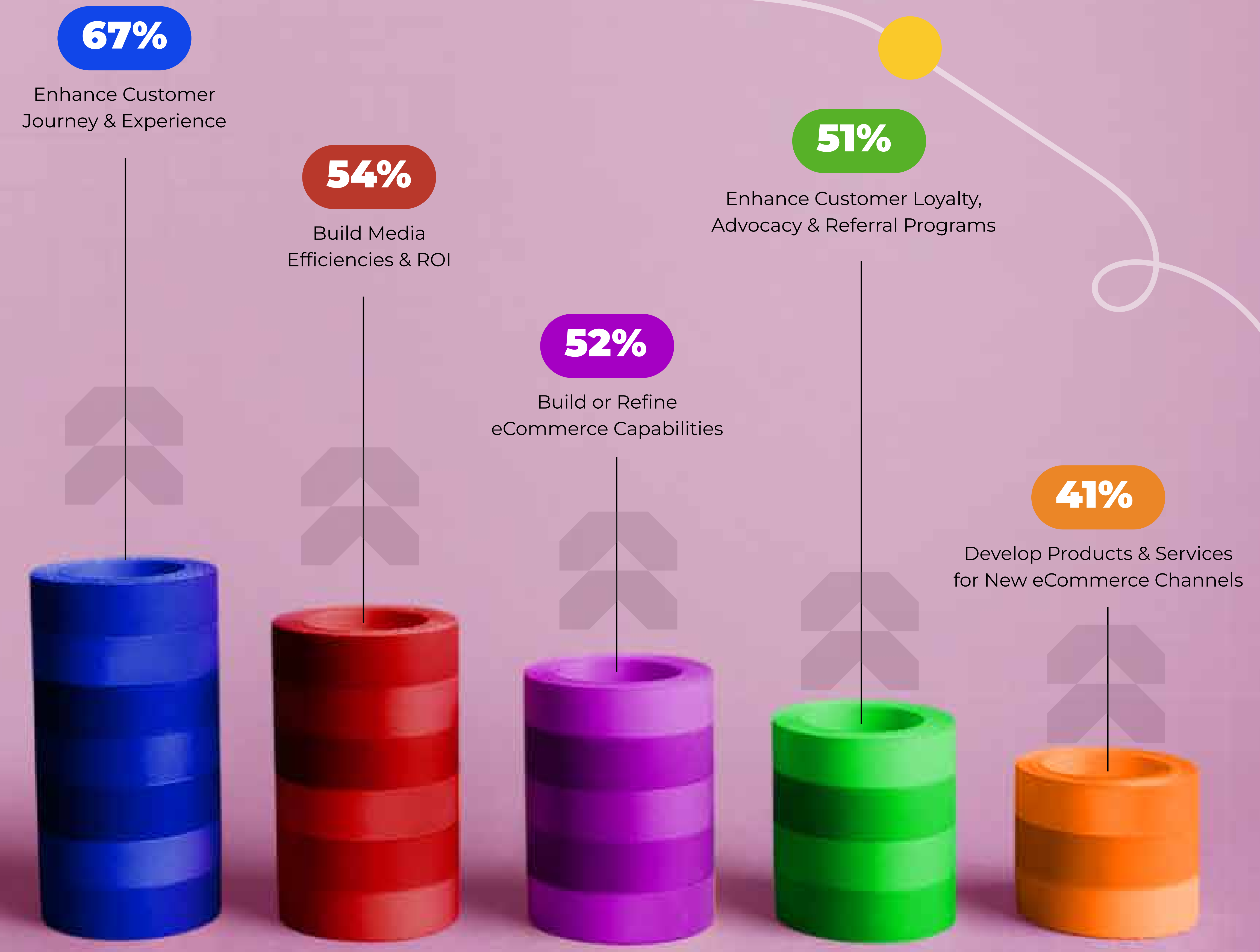
MARKETERS' TOP PRIORITIES FOR 2026

- **Enhance Customer Journey & Experience (67%)** - Seamless, hyper-personalised experiences are being prioritised to drive satisfaction, retention, and stronger brand engagement.
- **Build Media Efficiencies & ROI (54%)** - Data-driven strategies, AI optimisation, and advanced performance measurement are helping marketers maximise media impact.
- **Build or Refine eCommerce Capabilities (52%)** - Strengthening owned and partner eCommerce ecosystems remains key to improving conversion and sustaining growth.
- **Enhance Customer Loyalty, Advocacy & Referral Programs (51%)** - Deepening loyalty and advocacy is becoming critical to increasing lifetime value amid rising acquisition costs.
- **Develop Products & Services for New eCommerce Channels (41%)** - Quick commerce, D2C, and emerging marketplace models are being leveraged to meet evolving consumer demand.



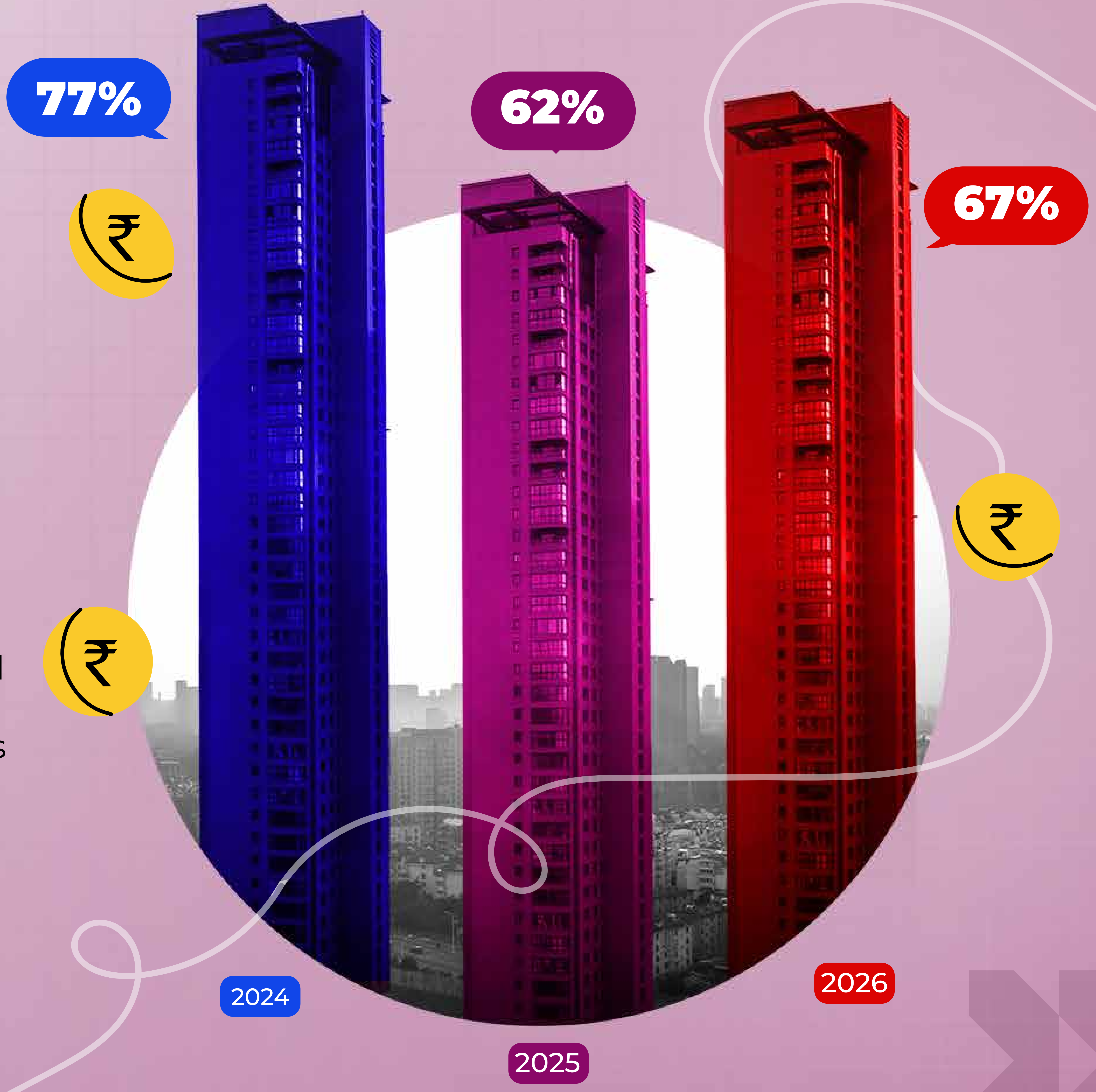
SECTION 2

MARKETING SPENDS & PRIORITIES

MARKETING INVESTMENTS

CONTINUE TO GROW IN 2026

67% of marketers plan to increase their marketing spends in 2026, indicating a measured rebound after a dip in intent in 2025, though still below the stronger momentum seen in 2024. This shift suggests cautious confidence - marketers are opening up budgets again, but with sharper focus and greater accountability, prioritising efficiency over aggressive expansion.



CHANGES IN MEDIA SPENDS

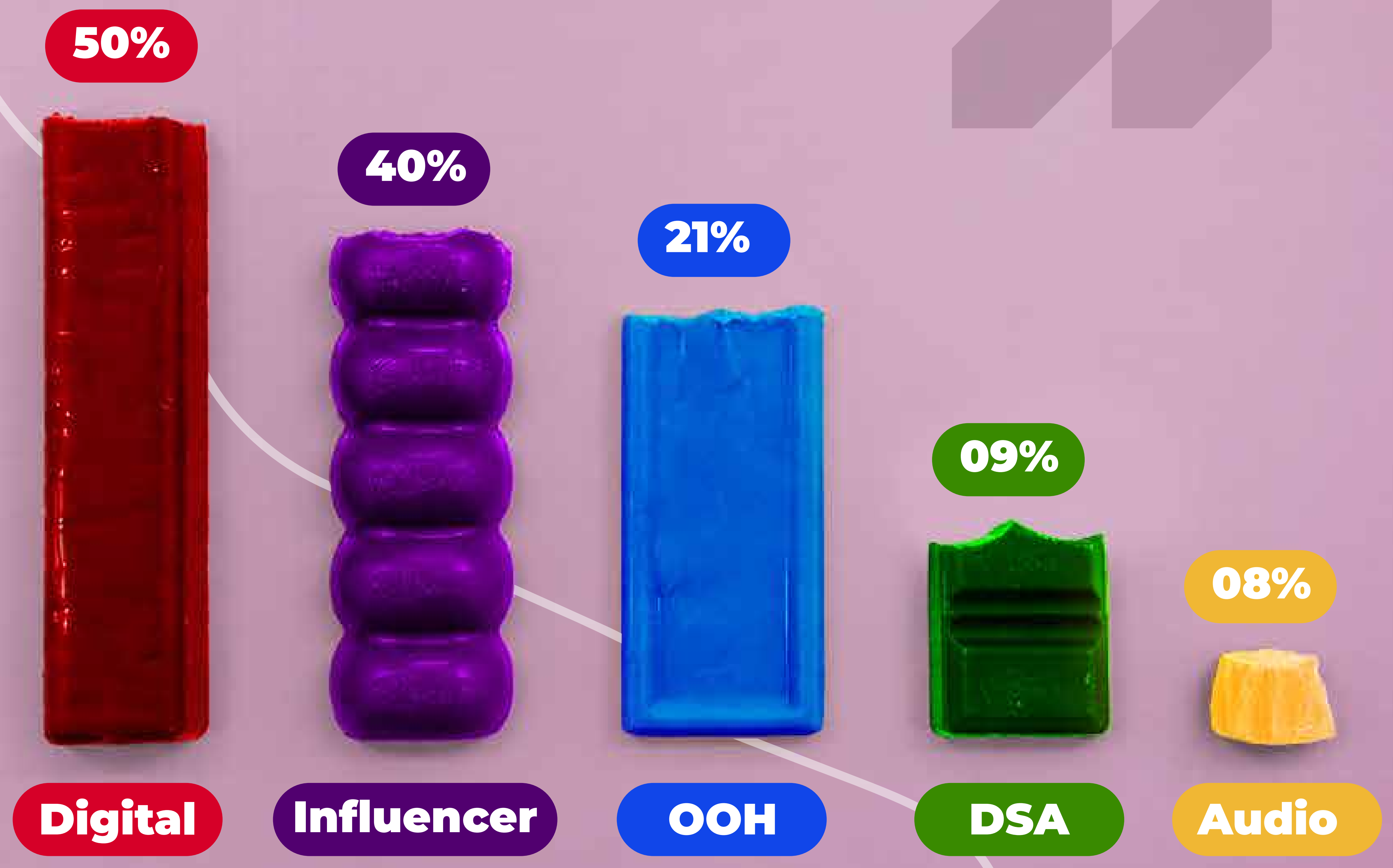
ACROSS CHANNELS

Media spends in 2026 continue to tilt decisively towards digital and performance-led channels.

Digital dominates planned increases, reaffirming its role as the primary growth driver, while influencer and celebrity-based marketing also sees strong momentum as brands double down on credibility, relevance, and creator-led engagement.

Traditional channels reflect a more cautious approach.
OOH shows selective growth, but Print, TV, Audio, Cinema, and Classifieds see higher levels of stagnation or non-investment, indicating tighter scrutiny on ROI and channel effectiveness.

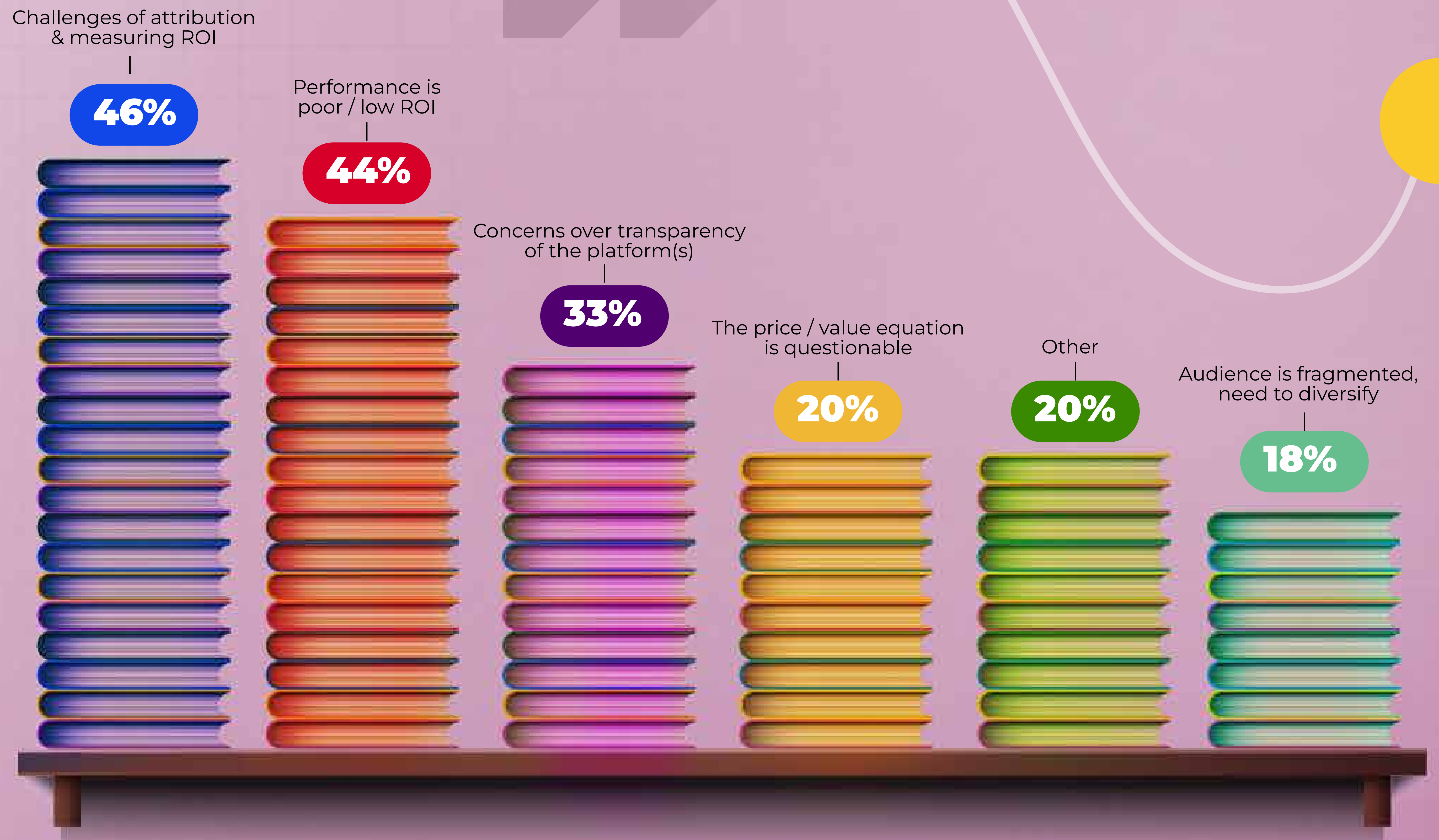
Overall, 2026 signals a more disciplined, outcome-focused media strategy, with budgets consolidating around high-impact, measurable channels and traditional media playing a more tactical role.



PERFORMANCE & MEASUREMENT

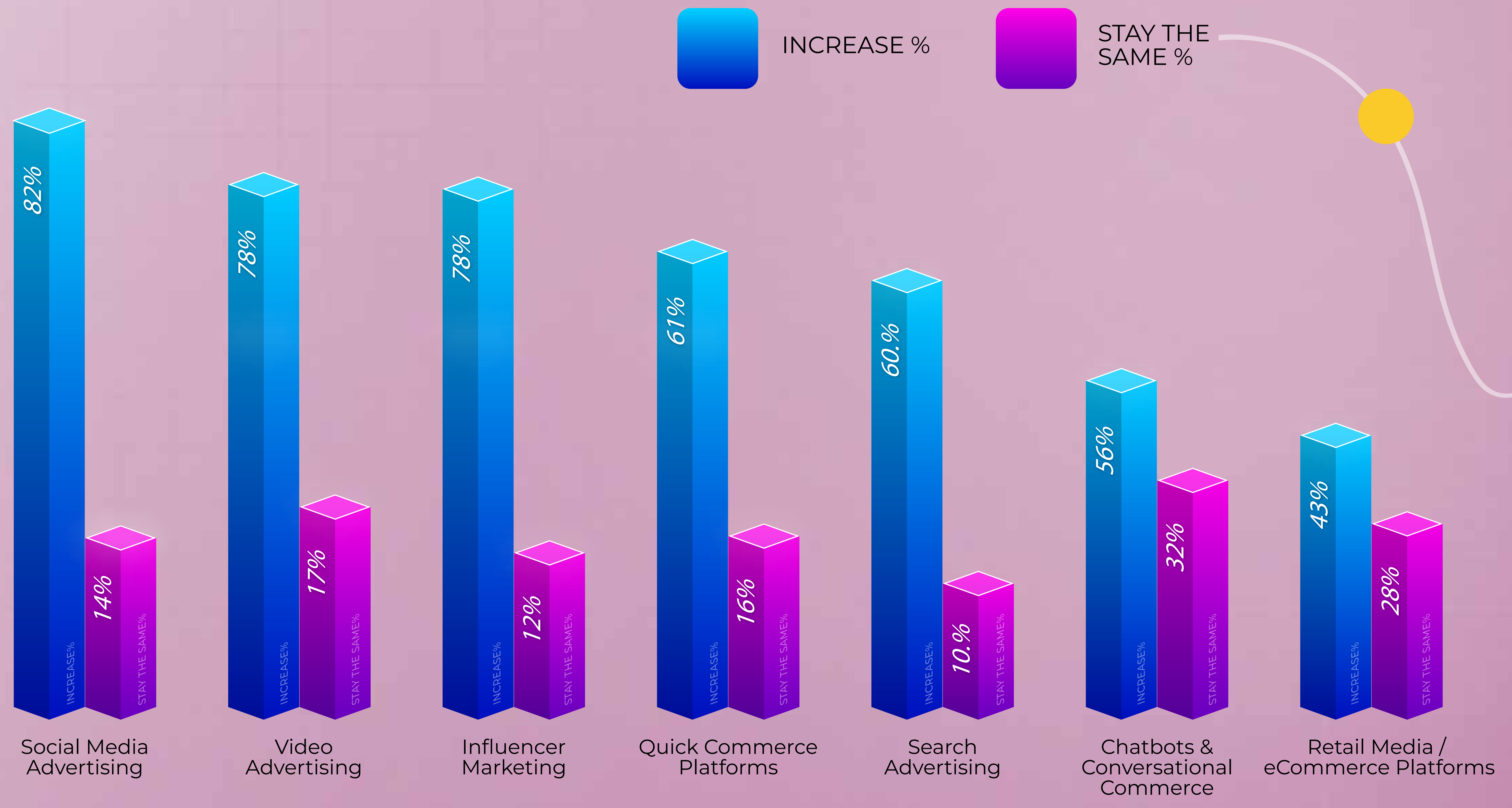
GAPS DRIVING CAUTIOUS MEDIA SPENDS

Cautious media spending in 2026 is driven by challenges in attribution and low ROI across select platforms. Difficulty in measuring impact continues to limit scale, while inconsistent performance reinforces conservative investment decisions. Concerns around transparency and the price-value equation further add to restraint, pushing marketers to prioritise channels that deliver clearer accountability and measurable outcomes.



MEDIA CHANNELS
WITH INCREASED OR SUSTAINED SPENDS

- Spends in 2026 are being concentrated on high-impact, high-engagement digital channels, with most marketers either increasing investments or maintaining current levels across priority platforms.
- Social media leads, followed by video and influencer marketing, reinforcing the shift toward content-led, audience-first platforms.
- Retail media, quick commerce, search, and conversational commerce continue to gain momentum, combining increased and steady spends to shorten the path to purchase and capture high-intent demand.
- Overall, marketers are prioritising scalable, engaging, and measurable channels, holding or increasing investments where performance is proven while deprioritizing lower-impact platforms.



SECTION 2.1

PERFORMANCE MARKETING

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PERFORMANCE MARKETING CONTINUES TO LEAD MEDIA PLANNING

While media investment remained performance-led across 2024 and 2025, planned allocations for 2026 indicate a modest rebalancing, with a slight increase in brand investment even as performance continues to lead media planning.

Branding

Performance

PERFORMANCE MARKETING PLAYS A DIRECT & MEASURABLE ROLE IN REVENUE GENERATION

- Performance marketing is widely perceived as having a direct impact on business outcomes, with most marketers attributing a moderate portion of overall revenue to performance-led activities.

- The distribution highlights that while performance marketing is a critical revenue driver, it is typically leveraged as part of a broader, integrated marketing mix rather than as a standalone growth engine. Ongoing challenges in revenue attribution make it difficult to assign precise, direct revenue impact to performance alone.

- Overall, the findings indicate that marketers continue to prioritize accountability and ROI, while maintaining balance to ensure long-term effectiveness amid rising acquisition costs and evolving platform and privacy dynamics.

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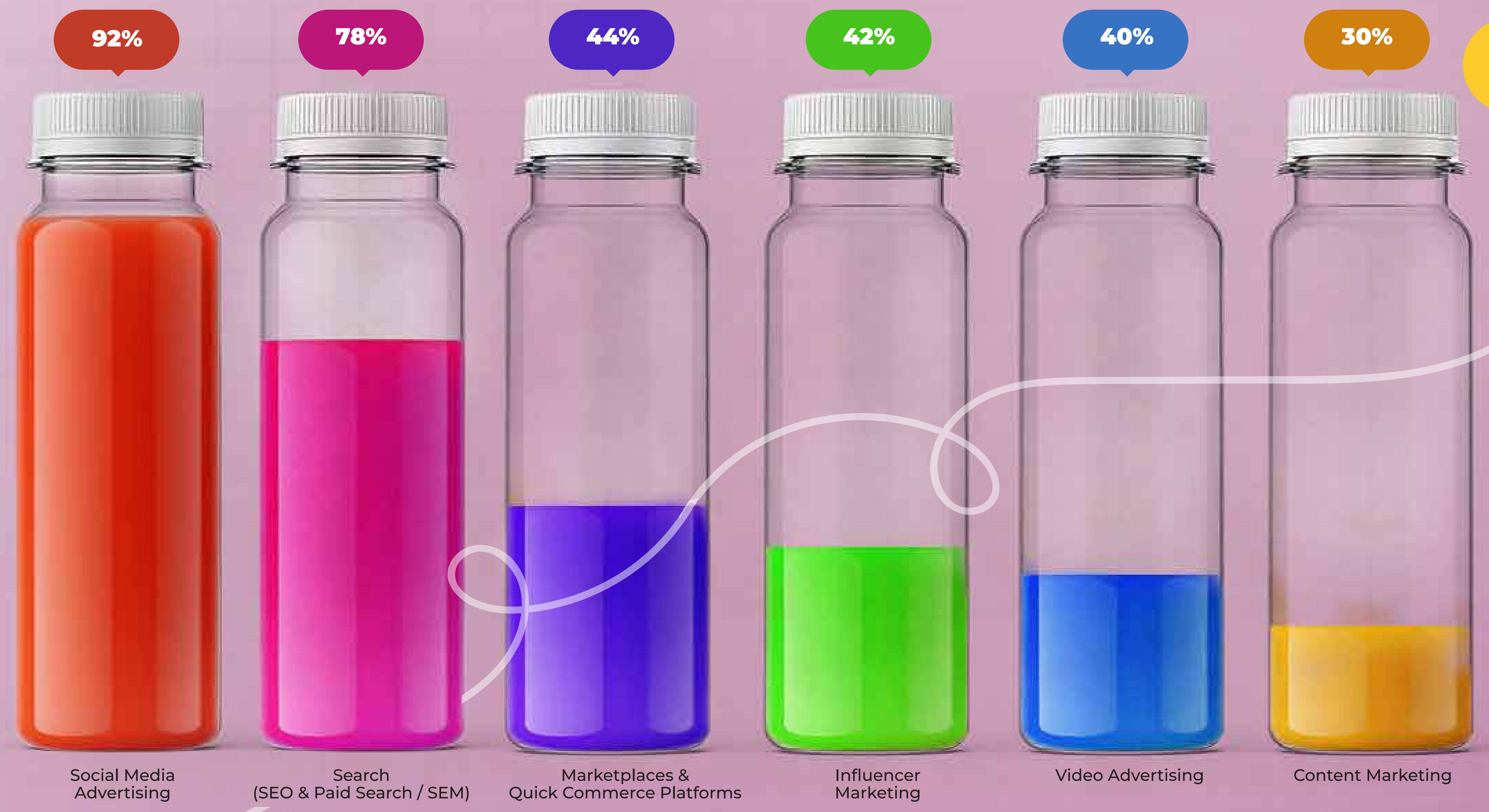
SOCIAL MEDIA OVERTAKES SEARCH TO LEAD THE PERFORMANCE MARKETING MIX

- While both continue to perform strongly, social media has now pulled ahead of search.
- Platforms like Meta, Instagram, LinkedIn, and X are increasingly preferred for their richer targeting options, interactive formats, and ability to drive content-led engagement - delivering not just visibility, but deeper audience interactions than search alone.



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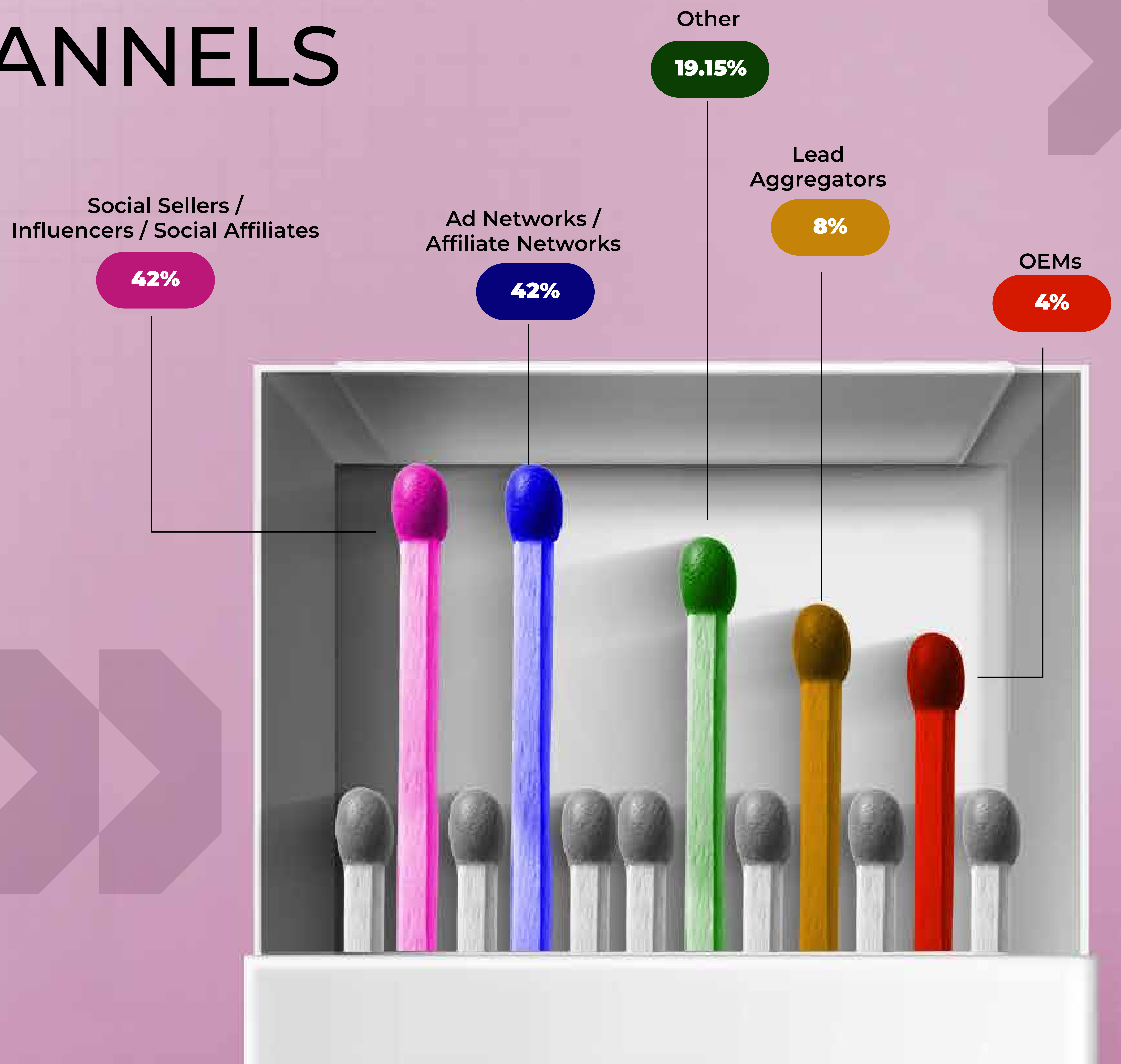
BREAKDOWN OF AFFILIATE MARKETING

SPENDS ACROSS KEY CHANNELS

- Affiliate marketing investments reflect a focused yet flexible approach, balancing scale, engagement, and performance efficiency across channel types.
- Social Sellers and Affiliate Networks Lead: Marketers favour channels that deliver high engagement and measurable outcomes at scale.
- Diversified Spend Strategy: Investments are spread across multiple affiliate models, reducing dependency while maintaining performance impact.
- Selective Experimentation: Continued allocation toward other and emerging formats signals an appetite for testing new affiliate opportunities to drive incremental growth.

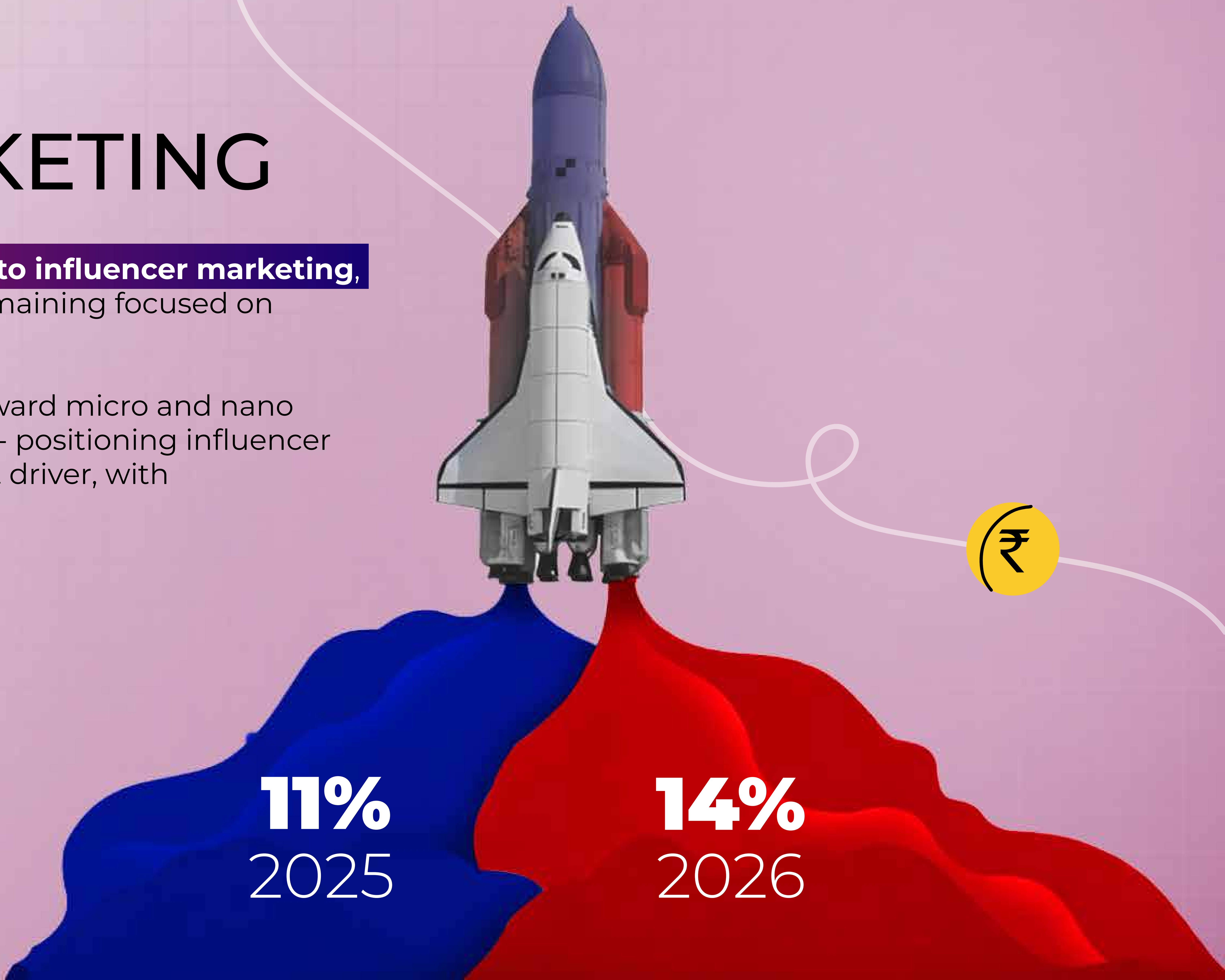


SECTION 2.2
INFLUENCER MARKETING

SPENDS ON INFLUENCER MARKETING

- With **14% of digital marketing budgets allocated to influencer marketing,** brands are steadily increasing investment while remaining focused on experimentation and measurable impact.

- Rather than pure scale, the emphasis is shifting toward micro and nano creators, authenticity, and platform-native formats - positioning influencer marketing as a strong awareness and engagement driver, with performance and ROI optimization still evolving.



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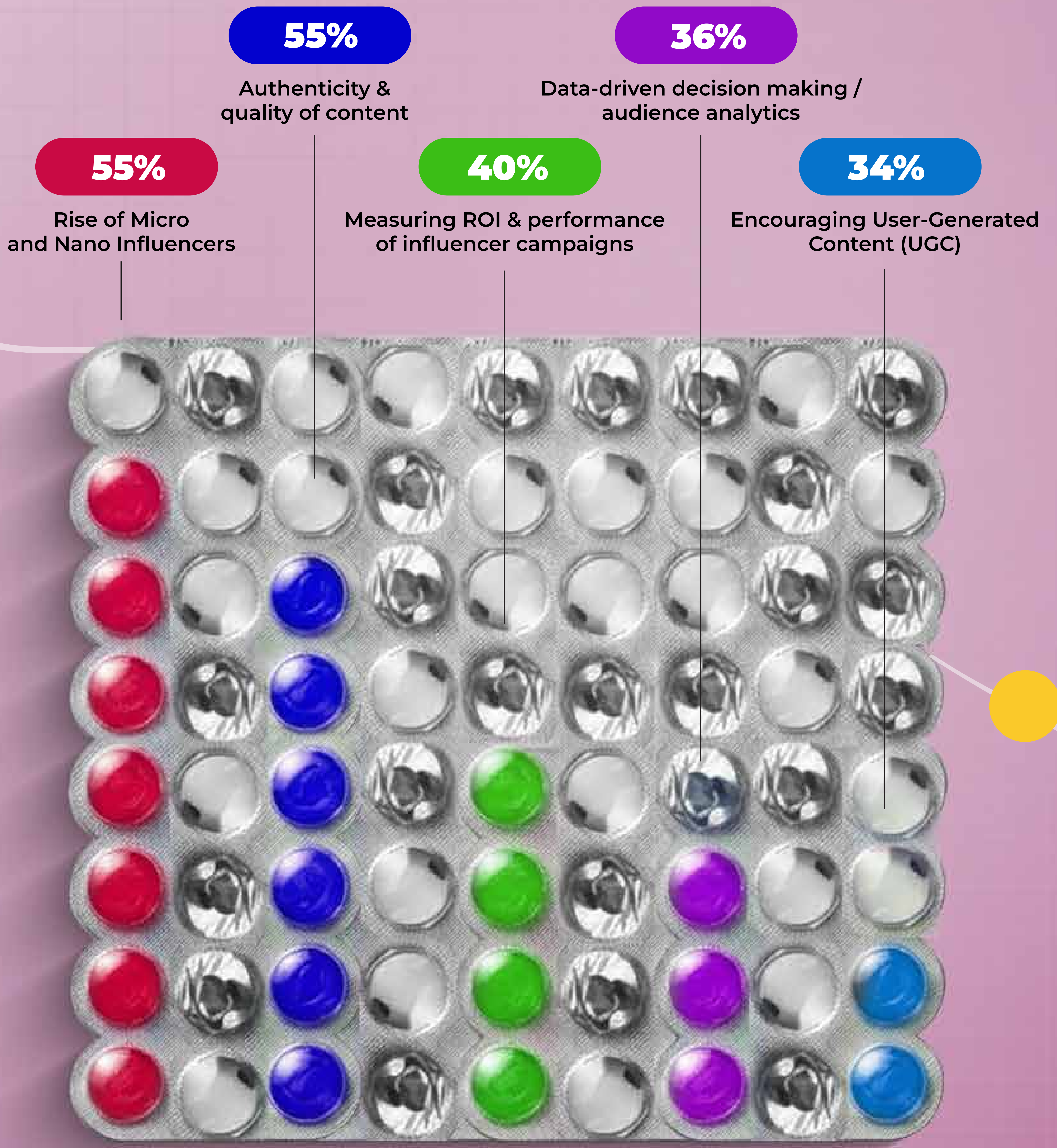
DATA-DRIVEN, AUTHENTICITY-LED STRATEGIES GAIN MOMENTUM IN INFLUENCER MARKETING

- Micro and nano influencers and authenticity of content are the top priorities shaping influencer marketing strategies in 2026, reflecting a shift toward deeper and more credible audience engagement.
- Data-driven decision making and ROI measurement are gaining traction as marketers look to better optimize campaigns, while growing focus on UGC and platform-native formats highlights an emphasis on relevance and resonance over scale.



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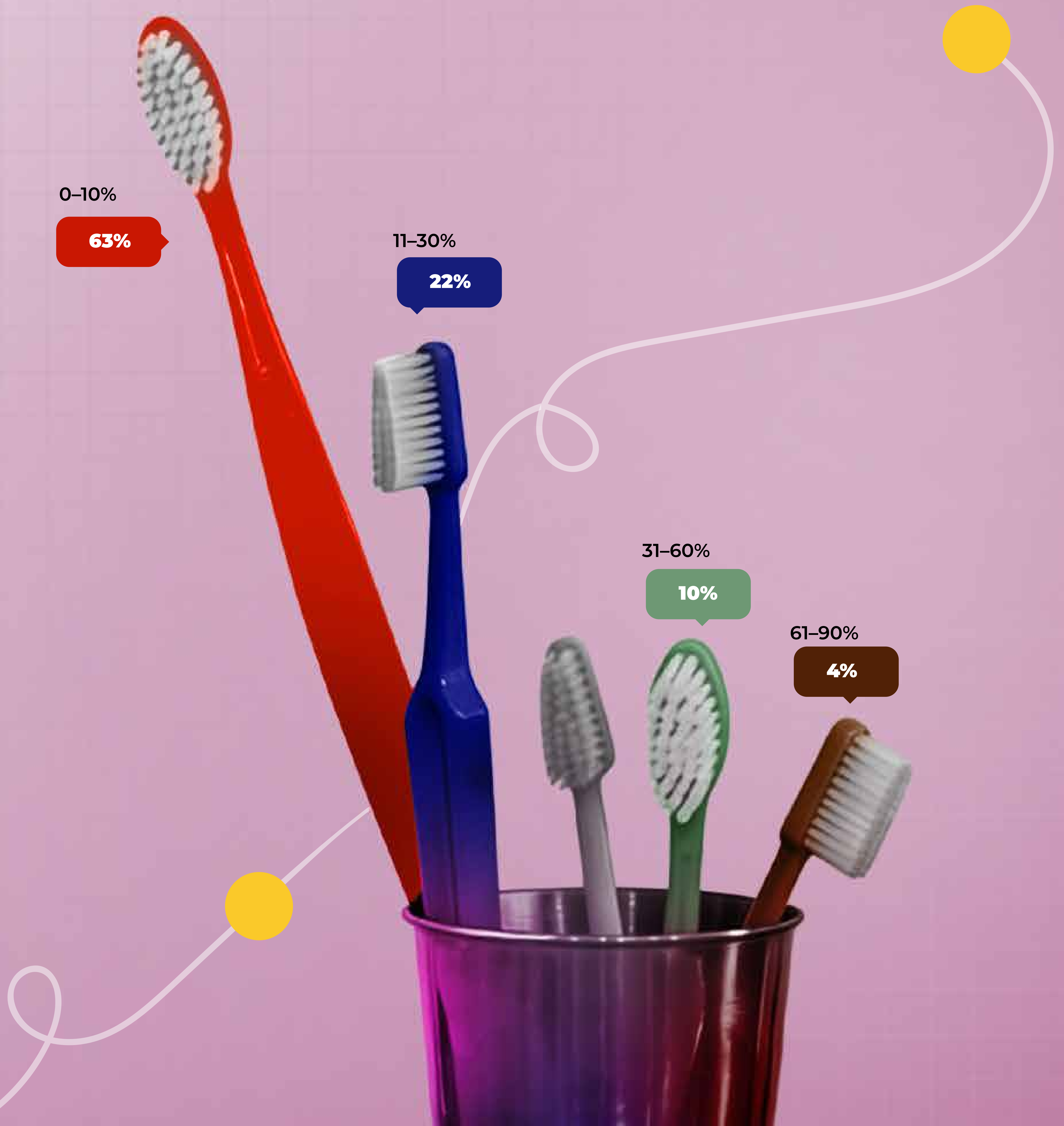
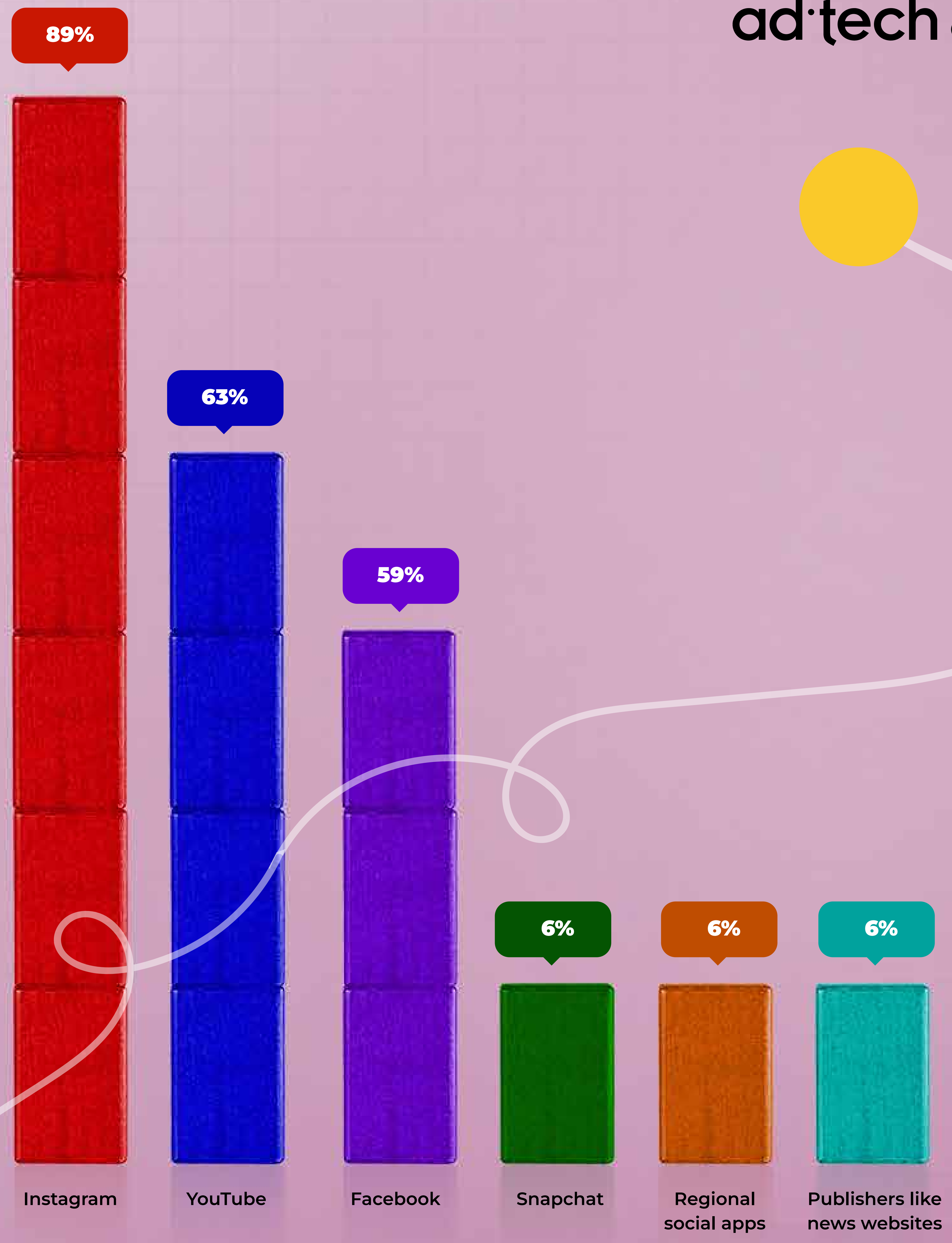
INFLUENCER MARKETING
IMPACT ON ROI

- 63% of companies report that influencer marketing contributes only 0-10% to their overall performance or ROI.
- This indicates that, for most businesses, influencer campaigns provide modest returns and are not the primary driver of measurable marketing impact.
- To maximize effectiveness, companies should integrate influencer efforts with broader marketing strategies rather than relying on them in isolation.



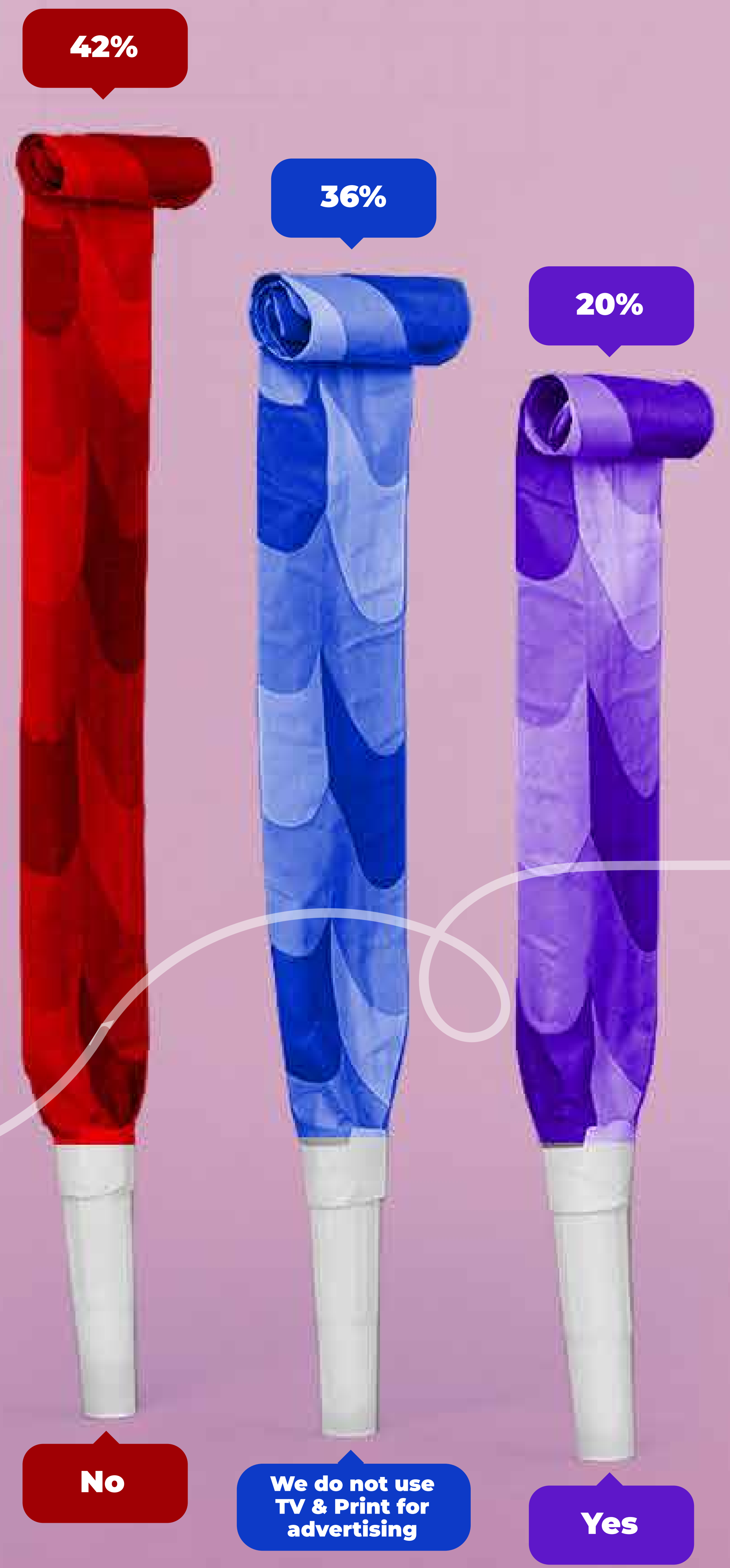
TOP PLATFORMS FOR INFLUENCER MARKETING

- Compared to 2024 and 2025, Instagram continues to dominate the influencer marketing mix, while YouTube maintains its strength for long-form content and emerging platforms are gradually gaining traction.
- The trend underscores marketers' focus on high-engagement, visually rich platforms while selectively exploring newer channels to diversify reach.



INFLUENCER ROI LAGS BEHIND CELEBRITY CAMPAIGNS

- About one in five brands find influencer marketing ROI comparable to traditional celebrity-driven campaigns, while nearly half report lower returns
- Over a third do not use TV or print advertising at all, highlighting a growing shift toward digital-first channels



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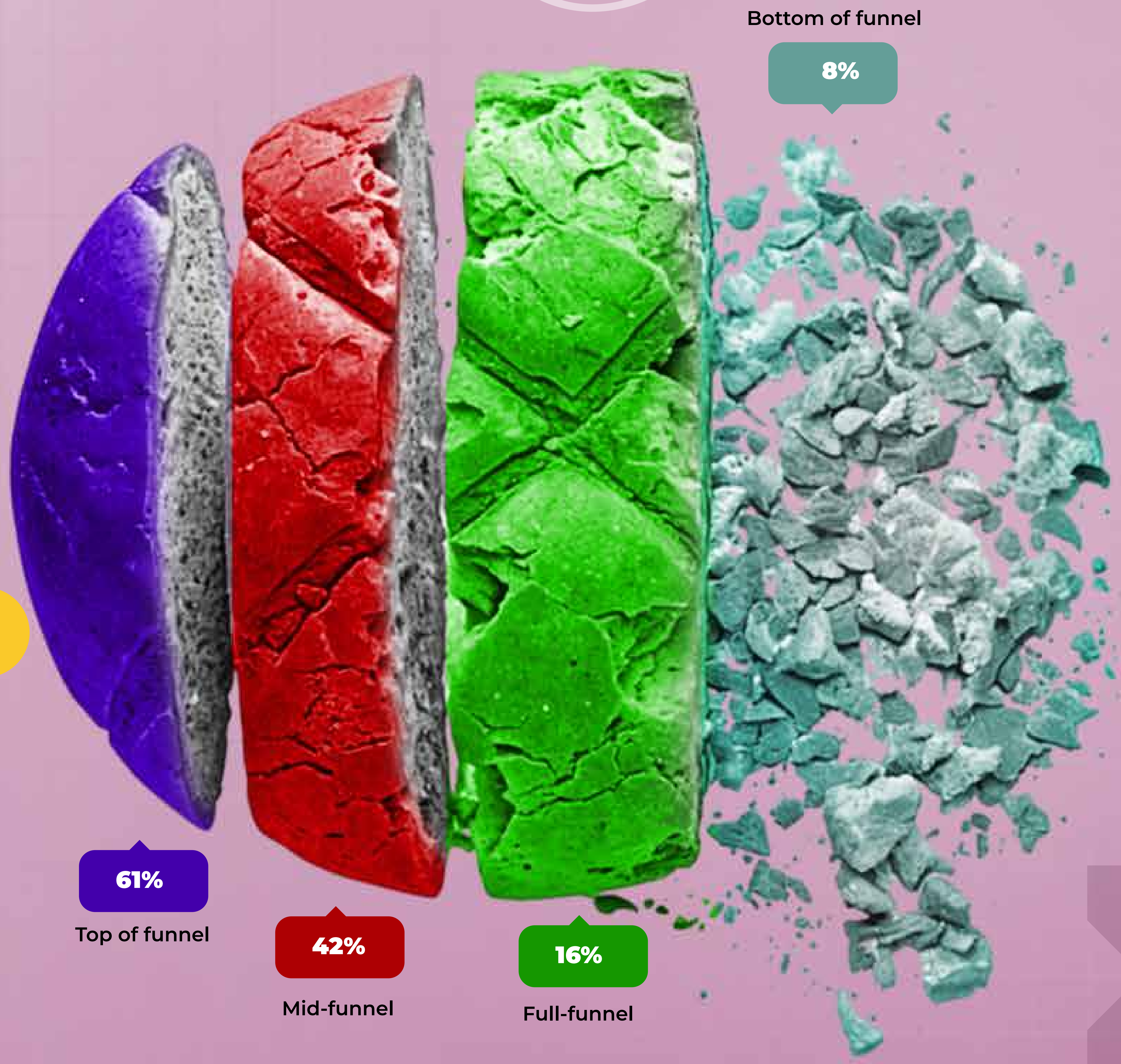
INFLUENCER IMPACT
ACROSS MARKETING FUNNEL

- Influencer marketing has its strongest impact at the top of the funnel, driving awareness and reach, with a significant role in mid-funnel engagement and consideration.
- Impact on conversions remains limited, while a small set of brands report full-funnel benefits.



SECTION 2.3
SOCIAL MEDIA

24% DIGITAL BUDGETS DIRECTED TO SOCIAL MEDIA

With 24% of digital marketing budgets allocated to social media, brands are taking a more measured and outcome-focused approach, prioritising platforms and formats that consistently drive engagement and returns. This investment reflects a continued reliance on core, high-impact platforms such as Instagram, YouTube, and Facebook, alongside a strong emphasis on short-form video, culturally relevant storytelling, and creator-led content, positioning social media as a key driver of visibility, engagement, and mid-funnel performance.

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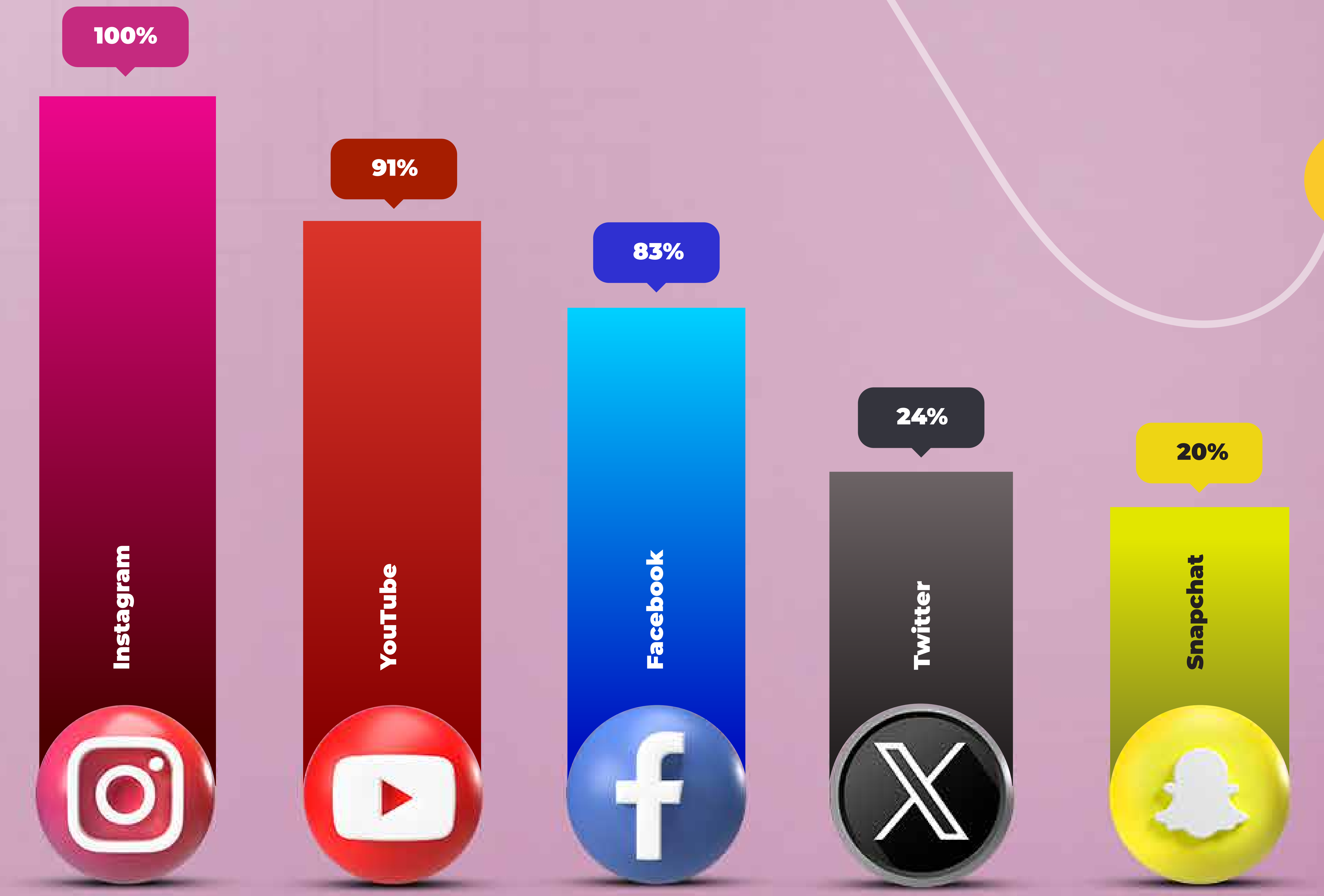
TOP SOCIAL MEDIA PLATFORMS

- Instagram continues to lead as the top social media platform among Indian brands, reinforced by its global reach and engagement power. YouTube and Facebook follow closely, highlighting the importance of video-first and community-driven platforms for audience connection.

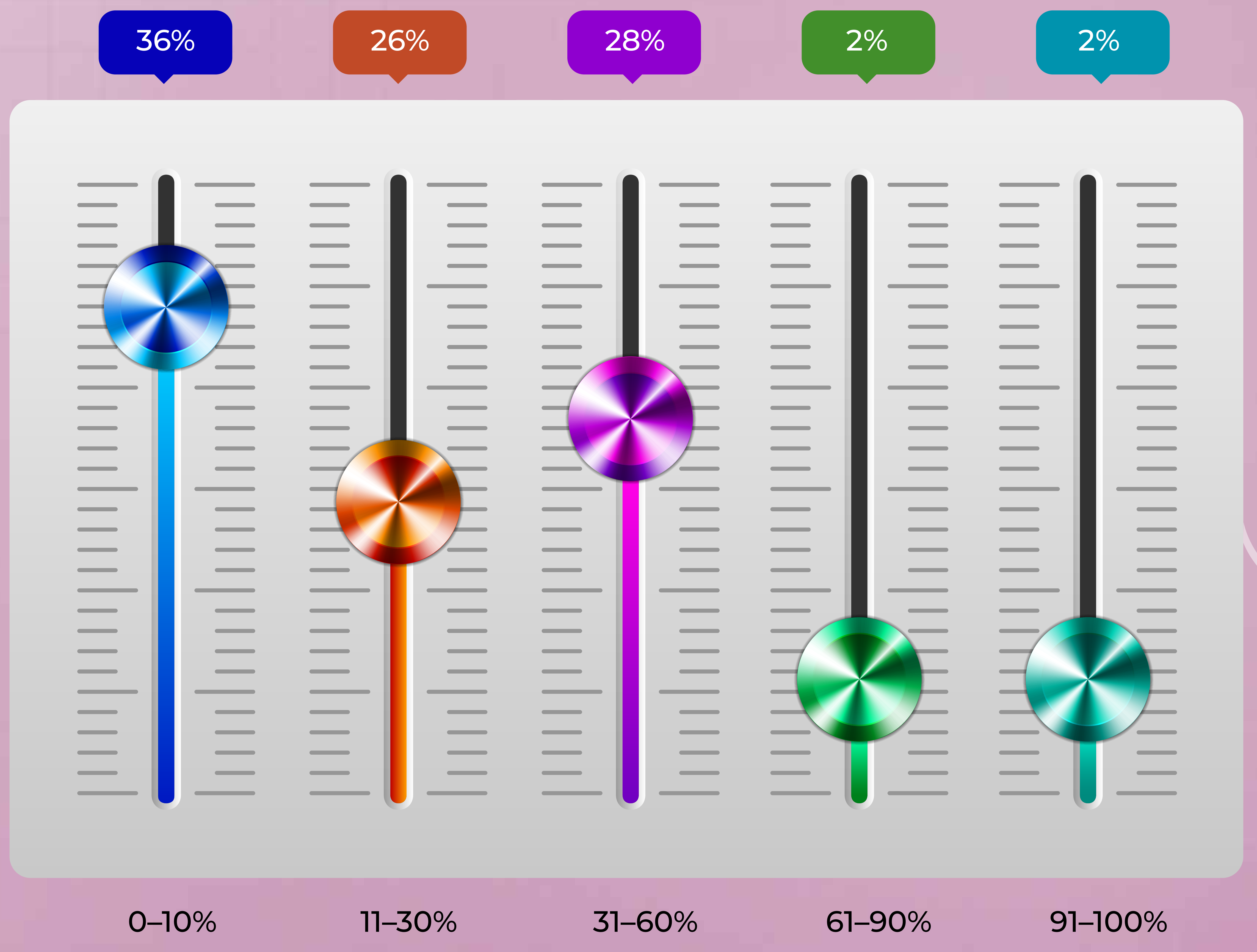
- Together, Instagram, YouTube, and Facebook anchor the social media mix, while other platforms such as Twitter, Snapchat, Pinterest, and regional apps are used selectively to extend reach and address specific audience or content needs.



SOCIAL MEDIA MARKETING IMPACT ON ROI

- While many brands report modest contribution from social media, around 29% see it driving 31-60% of their revenue performance or marketing ROI, highlighting its role not just in awareness but also in directly influencing business outcomes.

- Social media continues to support demand generation, engagement, and conversions across the marketing funnel, reinforcing its growing importance in the overall marketing mix.



KEY TRENDS SHAPING SOCIAL MEDIA STRATEGY

- Social media strategies are anchored in short-form, micro-video content, complemented by culturally relevant storytelling to strengthen audience connection. Long-form content continues to play a supporting role in deeper engagement.
- The growing role of creators and AI-driven content optimization reflects a shift toward more scalable and outcome-oriented execution. Emerging focus areas such as social commerce, niche communities, and interactive formats indicate that brands are moving beyond awareness toward measurable engagement and impact.

SECTION 2.4

CONNECTED TELEVISION (CTV)

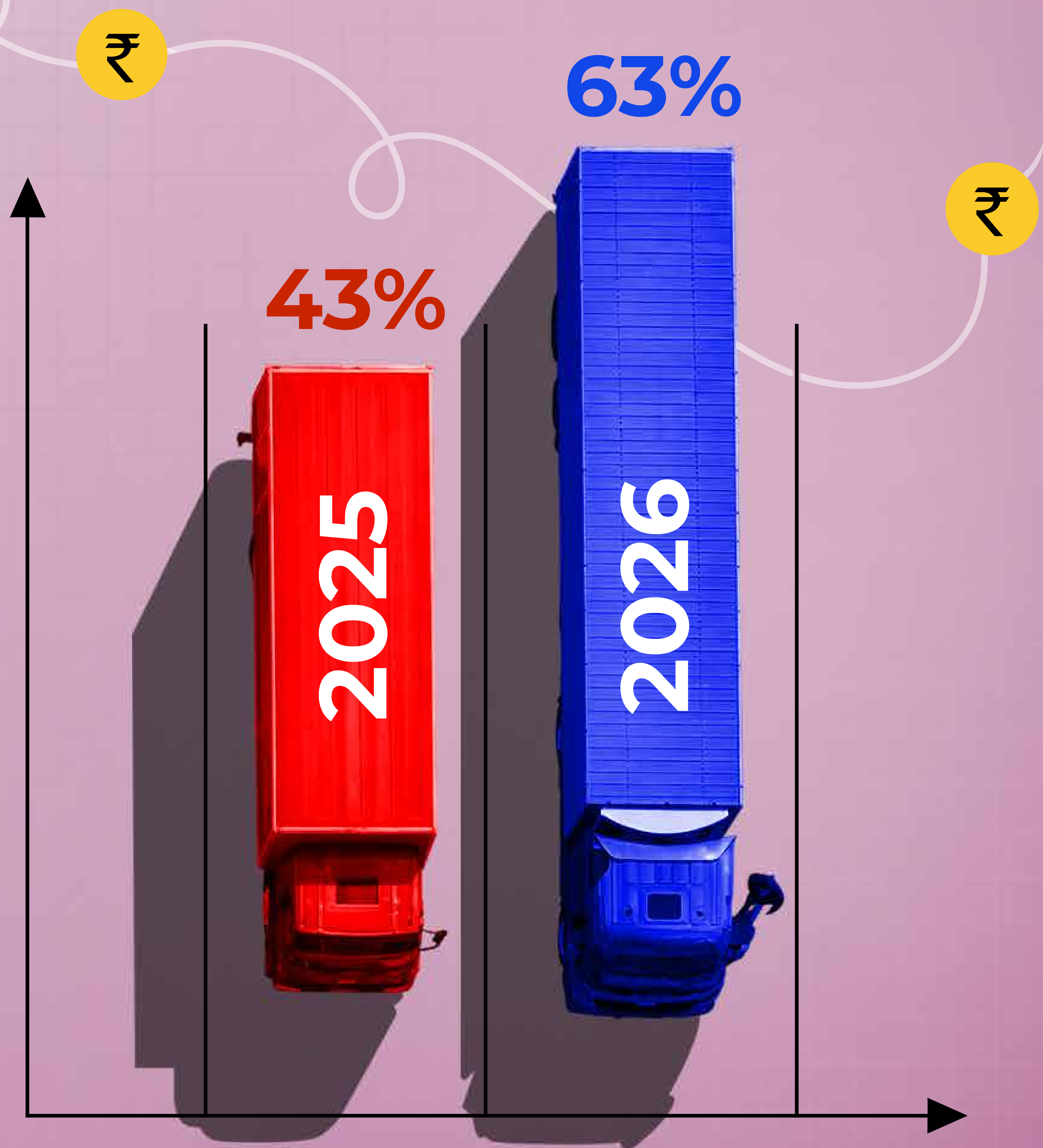
CTV BUDGETS ARE INCREASINGLY BECOMING A CENTRAL PART OF VIDEO STRATEGIES

- CTV investment is largely being reallocated from existing digital video budgets, with additional support from general advertising, linear TV, and smaller innovation or experimentation budgets.
- This underscores CTV's role as a key extension of cross-channel video efforts, driving outcome-focused investment in the evolving video ecosystem. CTV is set to take a significantly larger share of budgets, highlighting its rising strategic importance.

CTV BUDGET TRENDS

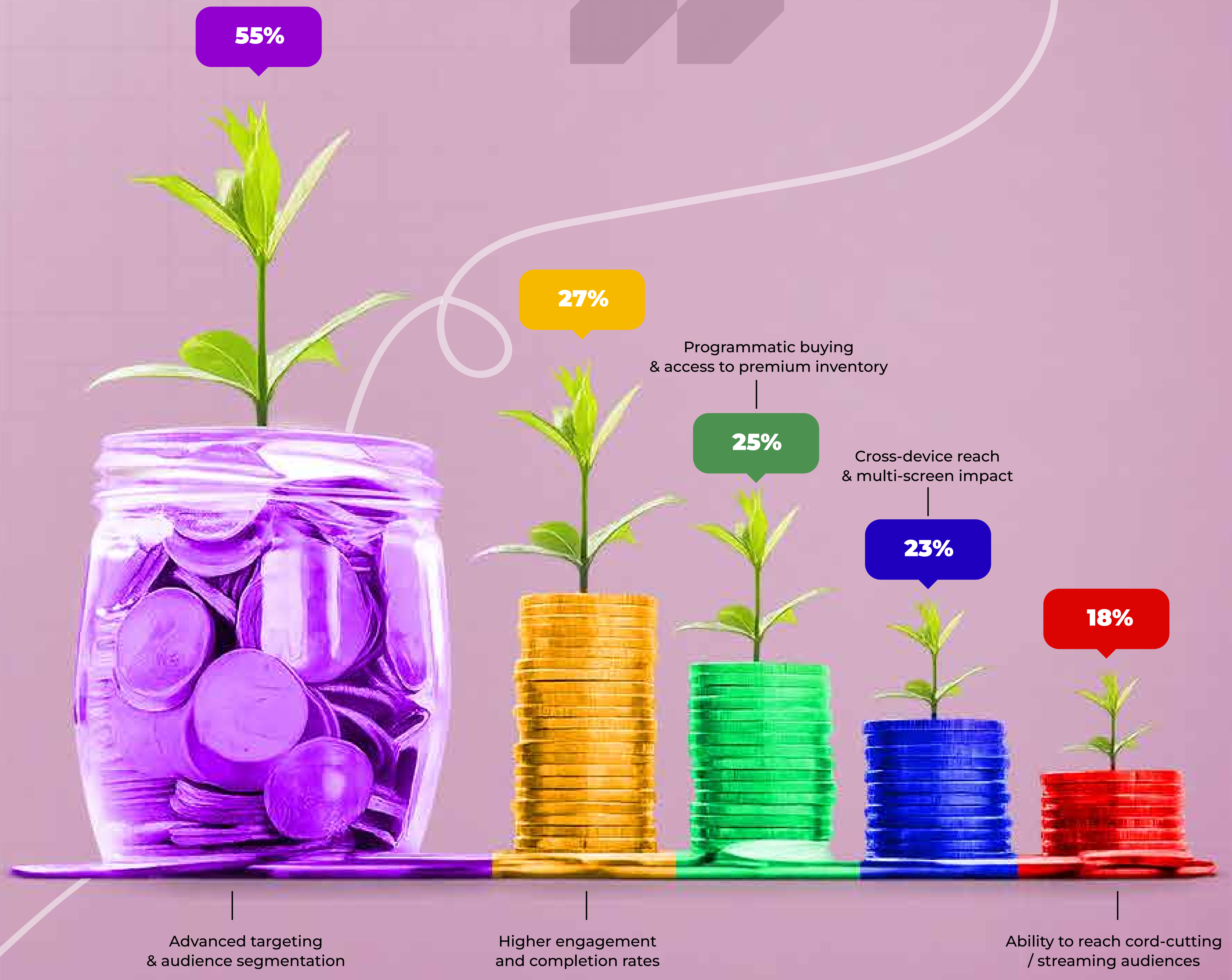
2026 VS 2025

- CTV continues its strong growth in 2026, with nearly two-thirds of respondents planning to increase their budgets.
- This signals a clear shift toward connected TV as a core part of digital video strategies. While a smaller share expects budgets to remain unchanged or decline, one-fifth of marketers do not yet invest in CTV.
- Overall, the data highlights that marketers are increasingly prioritizing CTV for its reach, targeting precision, and role in cross-channel campaigns.



PRIMARY DRIVERS
FOR CTV INVESTMENT

- Marketers are increasing CTV budgets to reach the right audience with precision and drive higher engagement and completion rates, while also leveraging programmatic access to premium inventory.
- Beyond these top reasons, CTV enables real-time campaign optimization, cross-device impact, and enhanced creative possibilities, making it a high-impact, measurable platform that strengthens modern video strategies and delivers quality reach where audiences are increasingly streaming.



SECTION 2.5

RETAIL MEDIA

RETAIL MEDIA'S
SHARE IN MEDIA BUDGET

22% of top marketers' total media budgets are allocated to retail media, reflecting a **15% increase from 2025.** This demonstrates a continued focus on performance-driven channels, the expansion of retail media networks, and the growing importance of **precise audience targeting.**

Retail media is increasingly valued for access to first-party shopper data, higher conversion rates, measurable ROI, and enhanced brand visibility at the point of purchase.
As networks offer more sophisticated targeting and measurement capabilities, marketers are prioritizing these platforms to drive ROI and integrate seamlessly into omnichannel strategies.

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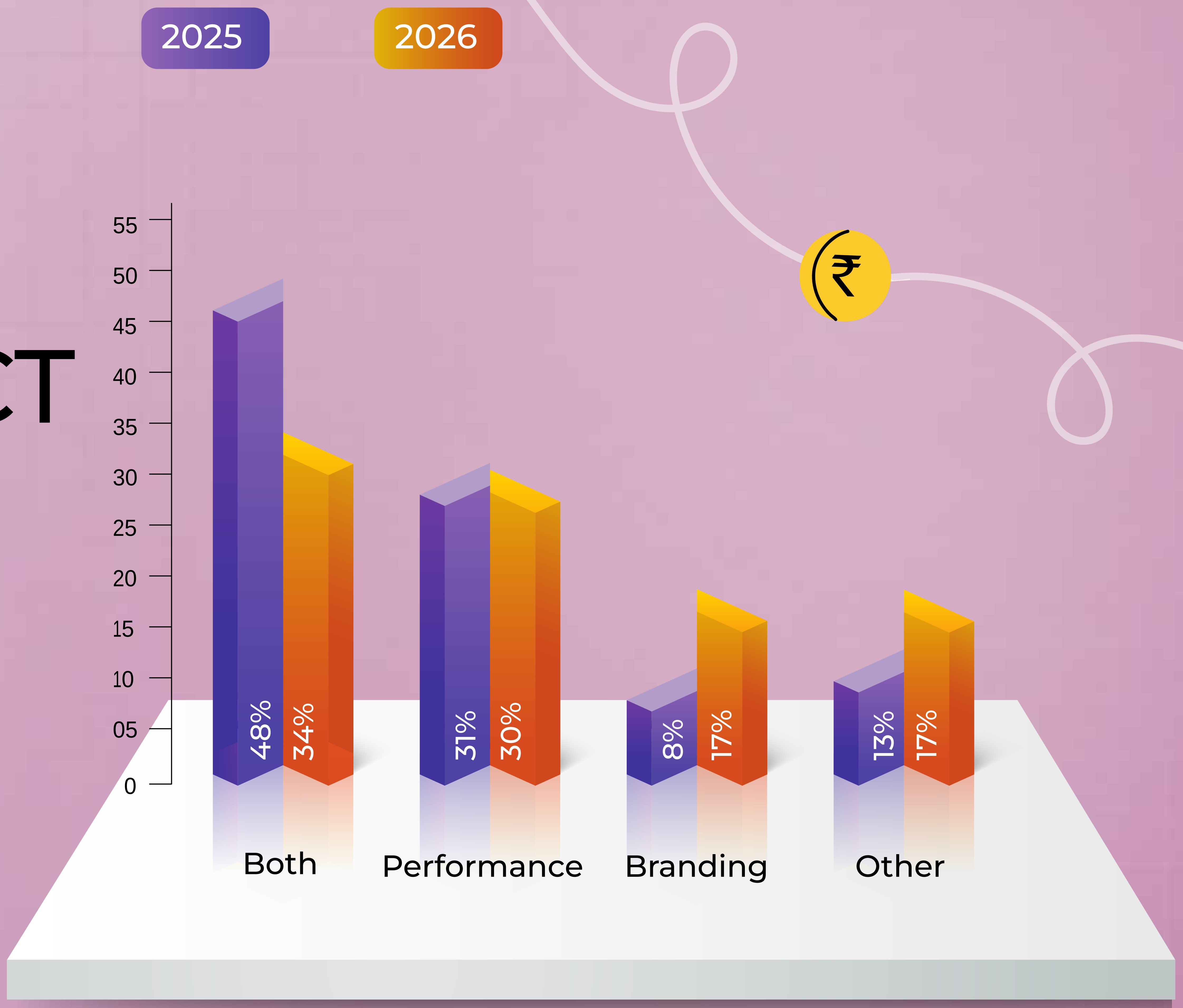
MARKETERS TURN TO RETAIL MEDIA FOR FULL-FUNNEL IMPACT

- In 2026, retail media continues to be led by dual-objective usage, with 35% of marketers using it for both branding and performance - down slightly from 48% in 2025. This consistency reinforces retail media's entrenched role as a full-funnel channel rather than a single-purpose tactic.

- Branding-only usage has increased, performance-only reliance has eased from 2025 levels, and growing "other" use cases point to increased experimentation and a more nuanced approach to retail media planning.



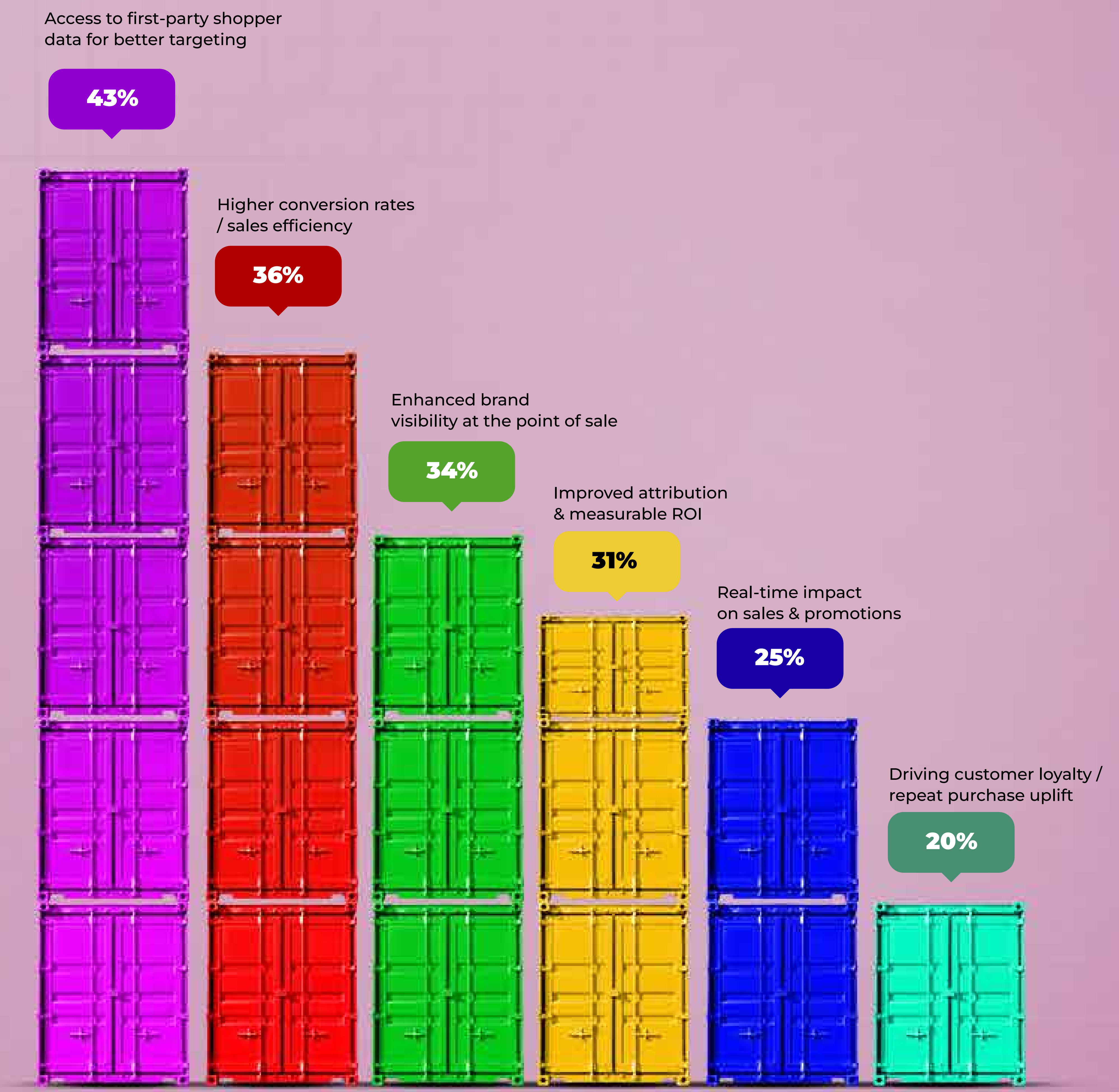
RETAIL MEDIA'S REVENUE IMPACT SHARPENS IN 2026

- In 2026, marketers demonstrate greater clarity around retail media's financial contribution, with around 24% attributing 31–60% of their overall marketing ROI to the channel - highlighting not just impact, but also the channel's strong attribution capabilities that allow performance to be measured more precisely.
- At the upper end, nearly 9% credit retail media with driving over 60% of revenue impact, reinforcing its evolution from a supporting tactic to a meaningful growth driver compared to prior years.

PERFORMANCE AND VISIBILITY DRIVE RETAIL MEDIA INVESTMENT IN 2026

- In 2026, performance outcomes are the primary driver of increased retail media spend, with marketers prioritizing access to first-party shopper data, higher conversion rates, and sales efficiency as direct paths to revenue growth.

- Enhanced brand visibility at the point of sale and improved attribution and measurable ROI further reinforce retail media's appeal, highlighting its ability to influence shoppers at critical moments while delivering measurable, accountable impact.



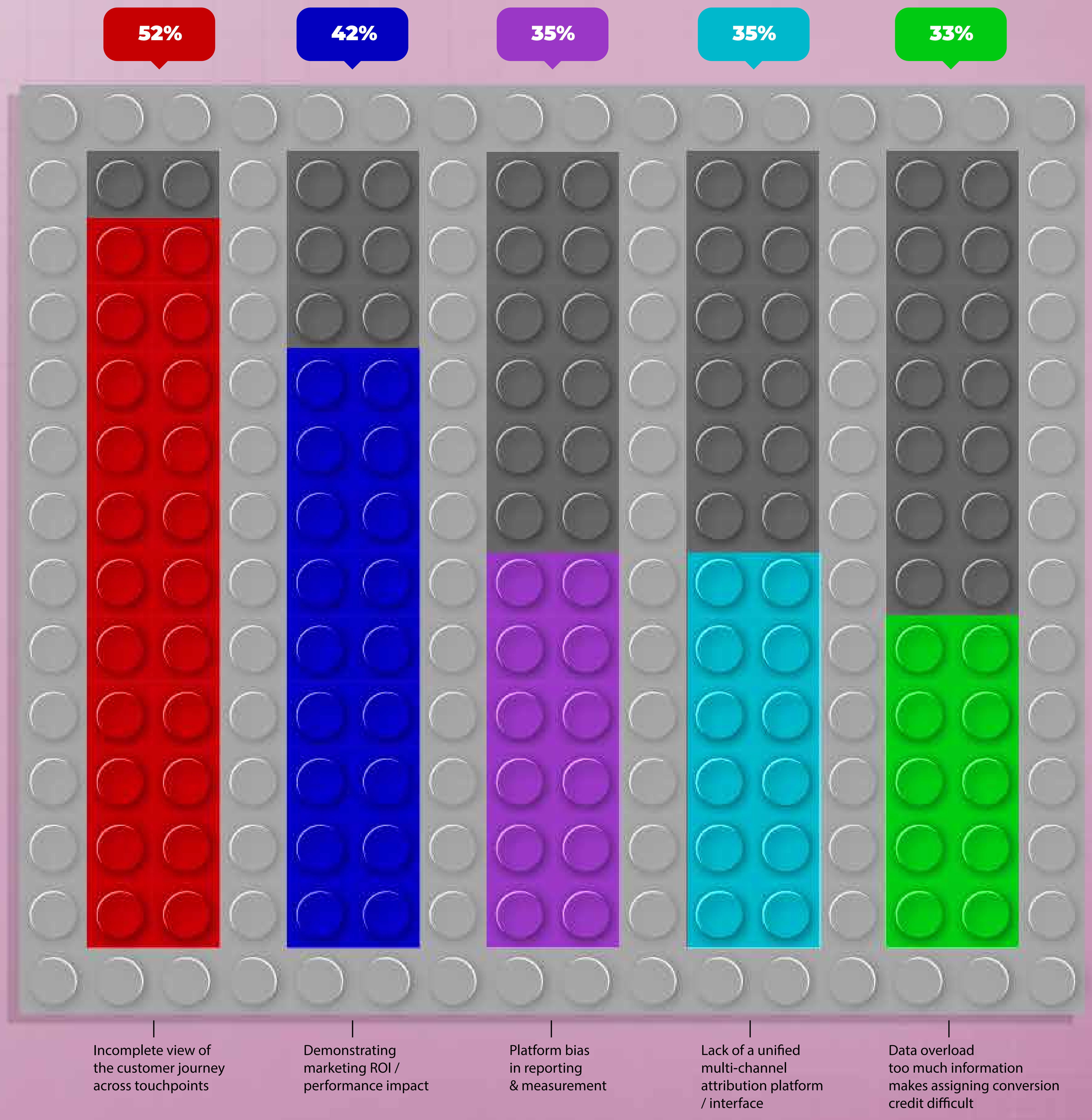
SECTION 3

ATTRIBUTION

TOP CHALLENGES
IN MEDIA ATTRIBUTION

In 2026, marketers continue to grapple with fragmented measurement, with an incomplete view of the customer journey across touchpoints emerging as the most critical challenge. The absence of a unified multi-channel attribution platform limits visibility into how media investments work together.

At the same time, demonstrating marketing ROI, platform bias, and data overload persist, underscoring the growing gap between the volume of available data and the ability to translate it into clear, actionable insights.



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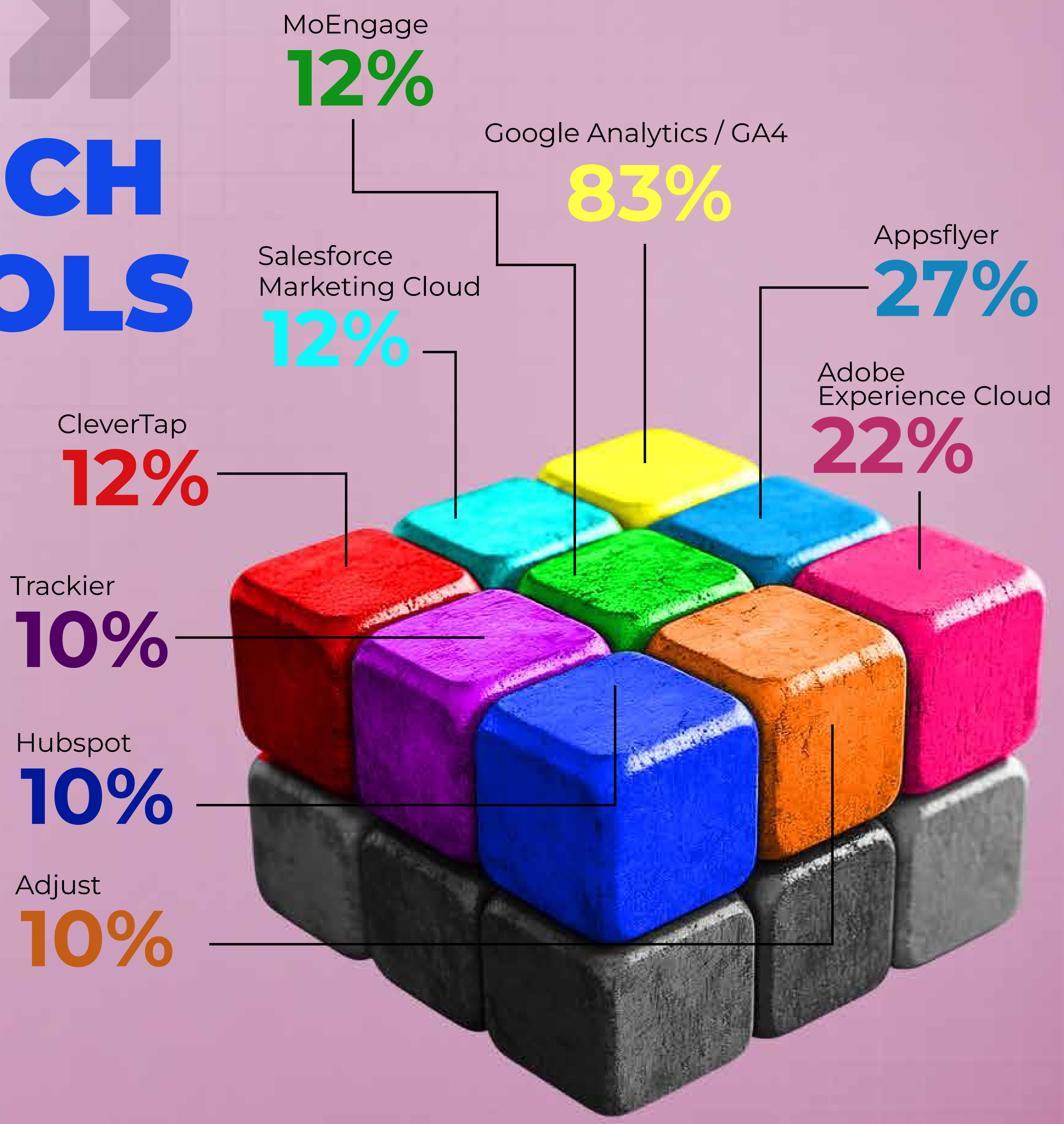
PREFERRED MARTECH & ATTRIBUTION TOOLS

In 2026, attribution remains highly consolidated, with Google Analytics/GA4 continuing to be the default measurement platform due to its ease of use and strong ecosystem integration.

Beyond GA4, usage is fragmented across specialized tools such as Appsflyer, Adobe Experience Cloud, MoEngage, Salesforce Marketing Cloud, and CleverTap, typically driven by specific needs like mobile attribution, marketing automation, or customer engagement.

Compared to 2025, this highlights an ongoing reliance on core analytics platforms, with limited standardization of advanced, standalone attribution solutions.



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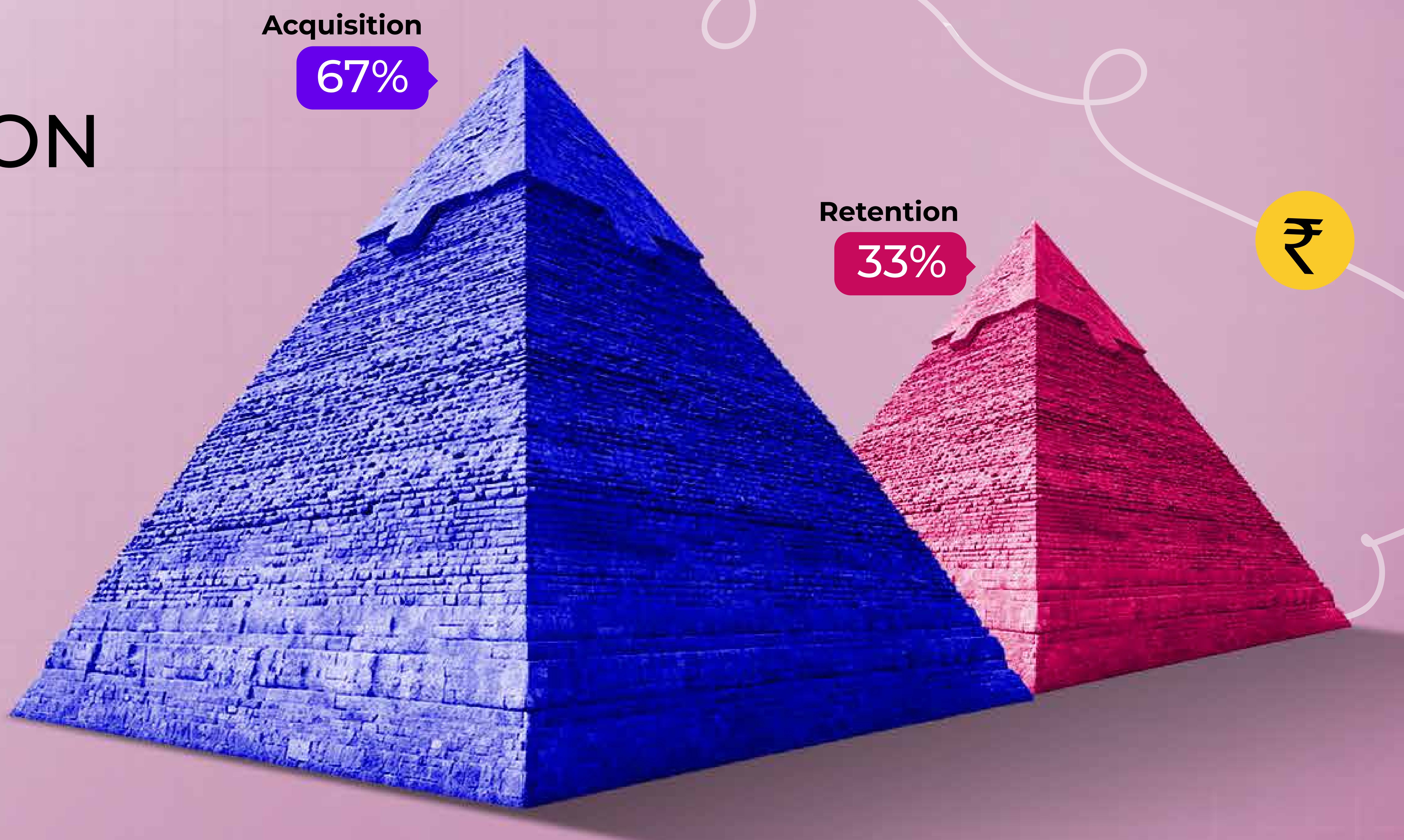
SECTION 4

ACQUISITION & RETENTION

MARKETING SPENDS TILT TOWARDS CUSTOMER ACQUISITION

- Marketing investments remain heavily skewed towards customer acquisition, with 67% of spends focused on pre-sales efforts, underscoring the continued priority on driving growth, reach, and new customer onboarding.

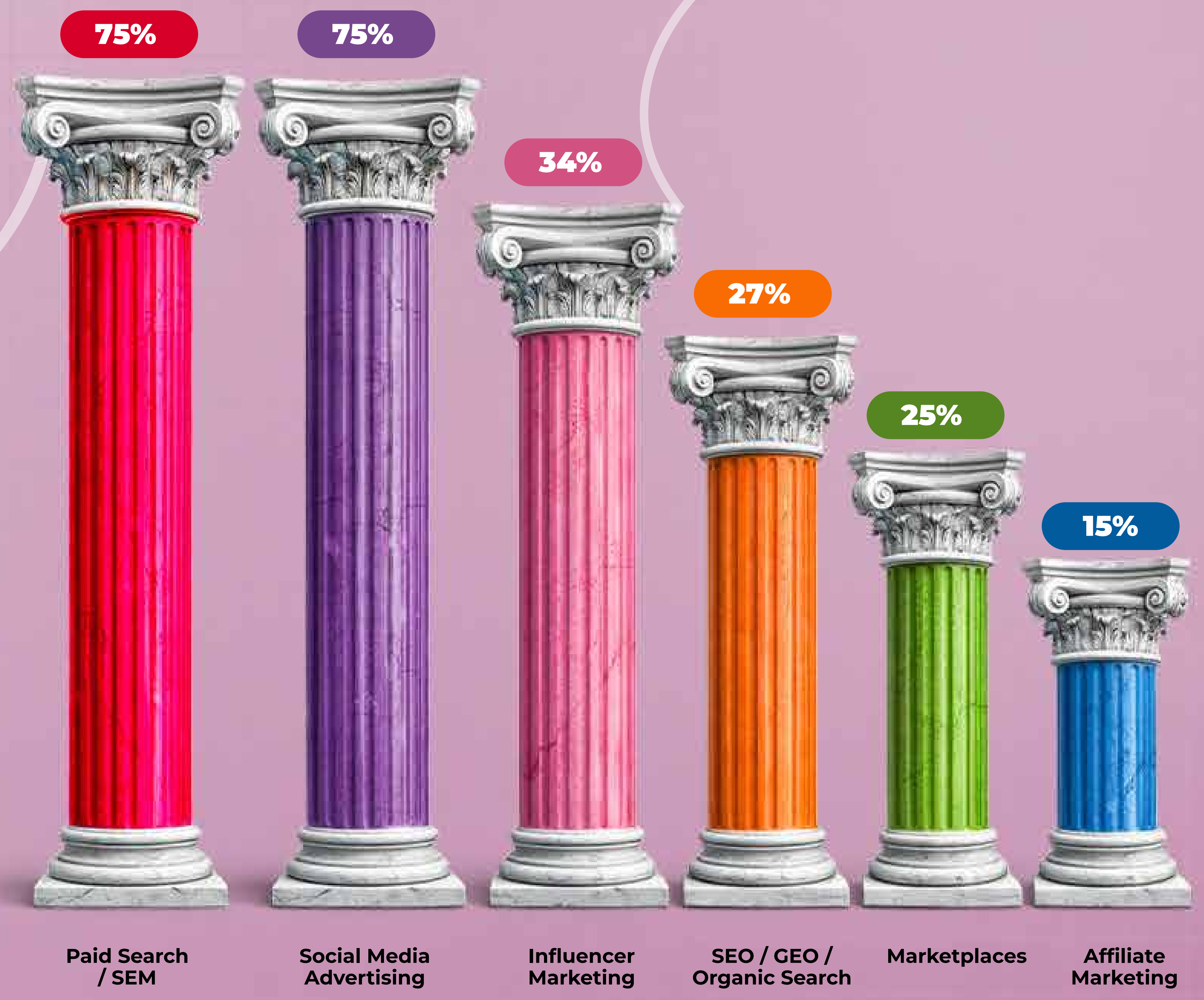
- Retention and loyalty account for 33%, indicating a growing - but still secondary - focus on nurturing existing customers, building long-term value, and strengthening post-sales engagement.



TOP CHANNELS
FOR CUSTOMER ACQUISITION

- **Paid Search/SEM and social media advertising lead equally at 75%,** establishing high-intent, performance-driven channels as the primary drivers of customer acquisition.

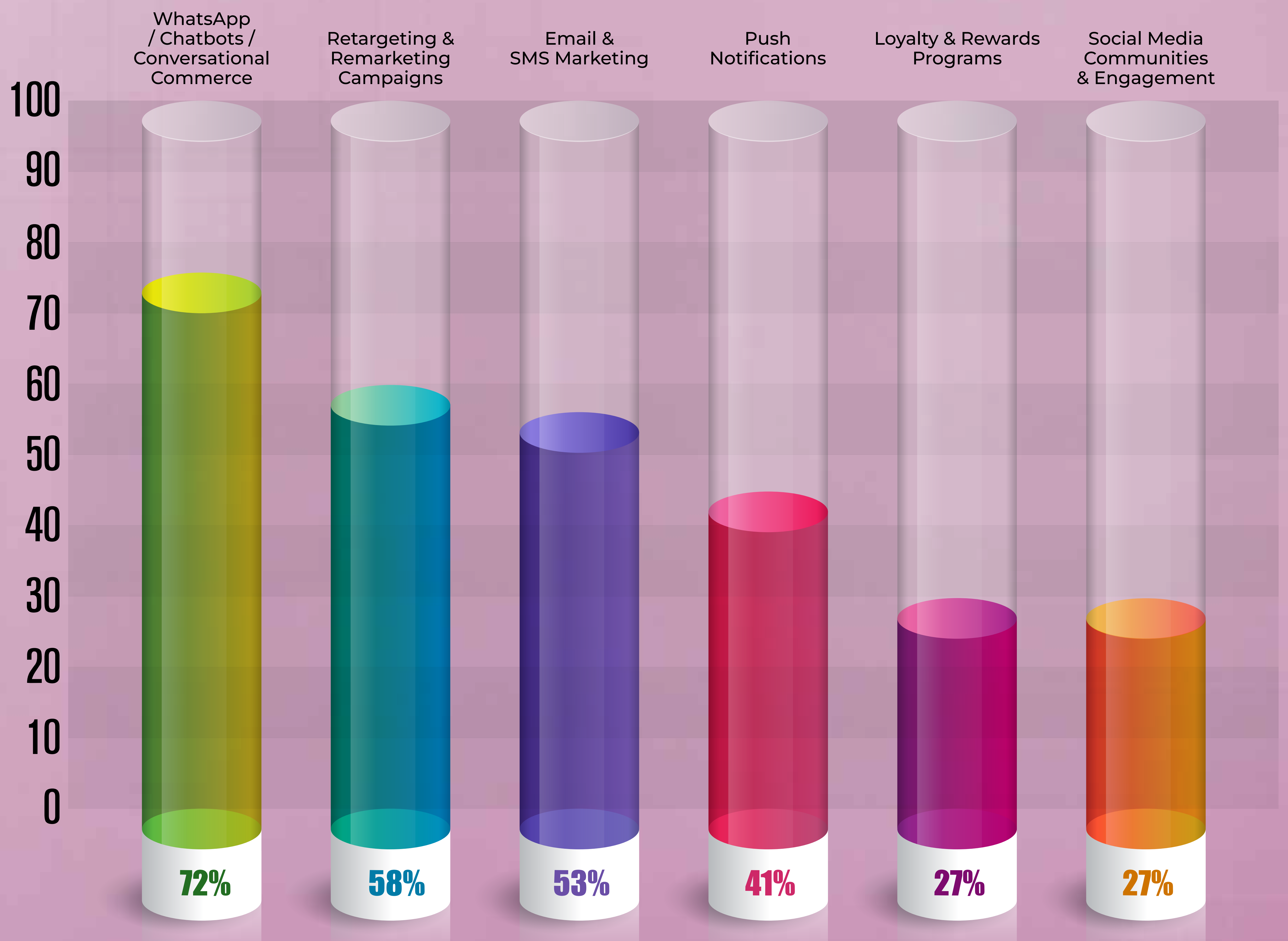
- Supporting channels include SEO, influencer marketing, marketplaces, and brand websites or apps, while lower reliance on other channels underscores a continued focus on measurable, conversion-led growth.



KEY CHANNELS
FOR RETENTION & LOYALTY

- **WhatsApp, chatbots, and conversational commerce lead at 72%,** underscoring the dominance of direct, real-time engagement in driving repeat behavior.

- These are complemented by retargeting campaigns, email/SMS, loyalty and rewards programs, push notifications, and owned platforms/social engagement, reflecting a retention strategy rooted in consistent, personalized, and high-frequency customer touchpoints.

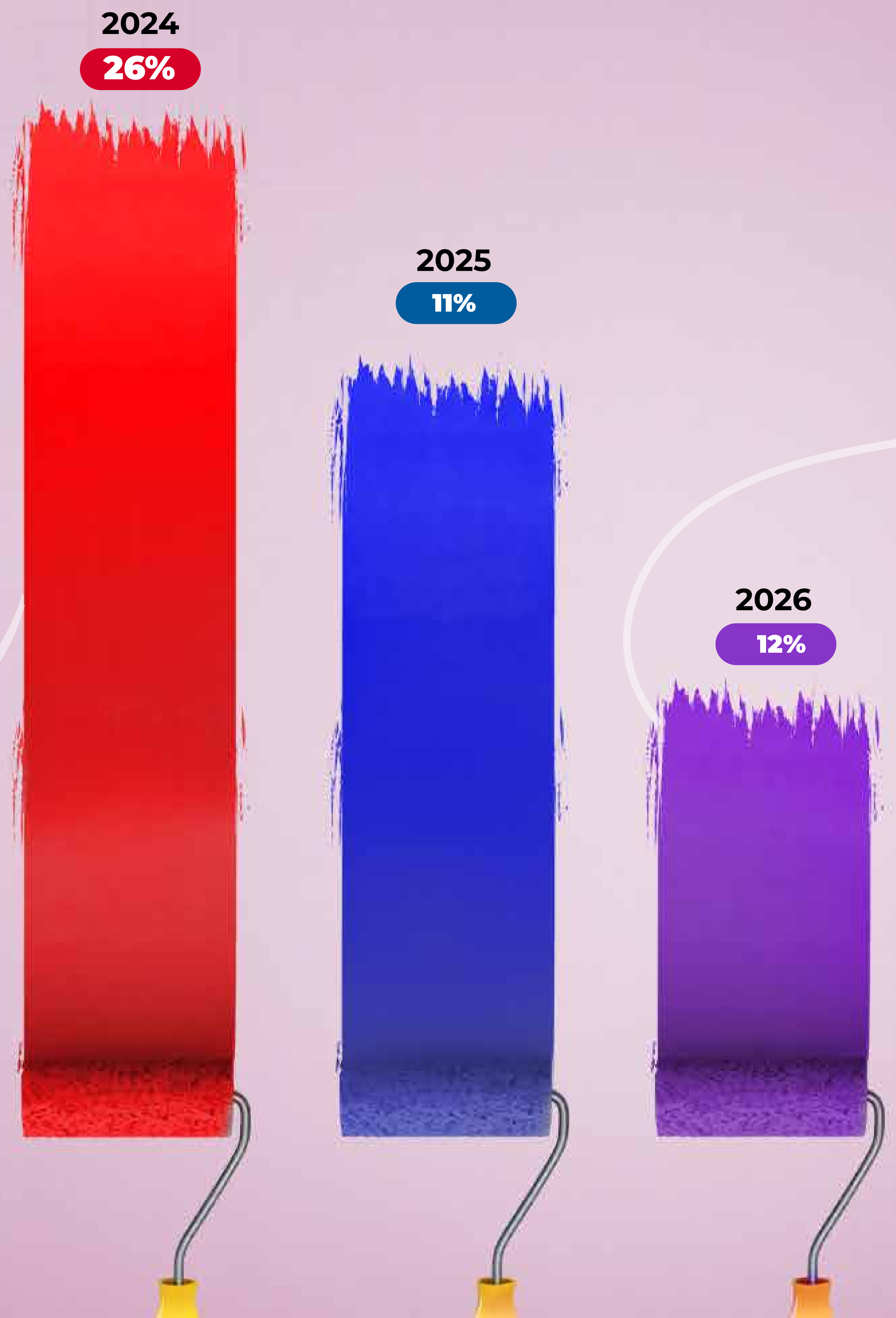


SECTION 5

MARTECH INVESTMENTS & PRIORITIES

CAUTIOUS MARKETERS LOWER EXPERIMENTAL SPENDS

- **12% of marketing budgets** are allocated to martech and other innovations, a slight increase from 2025, but still well below 2024.
- This indicates that while experimentation is gradually recovering, marketers remain selective and performance-focused in their approach.



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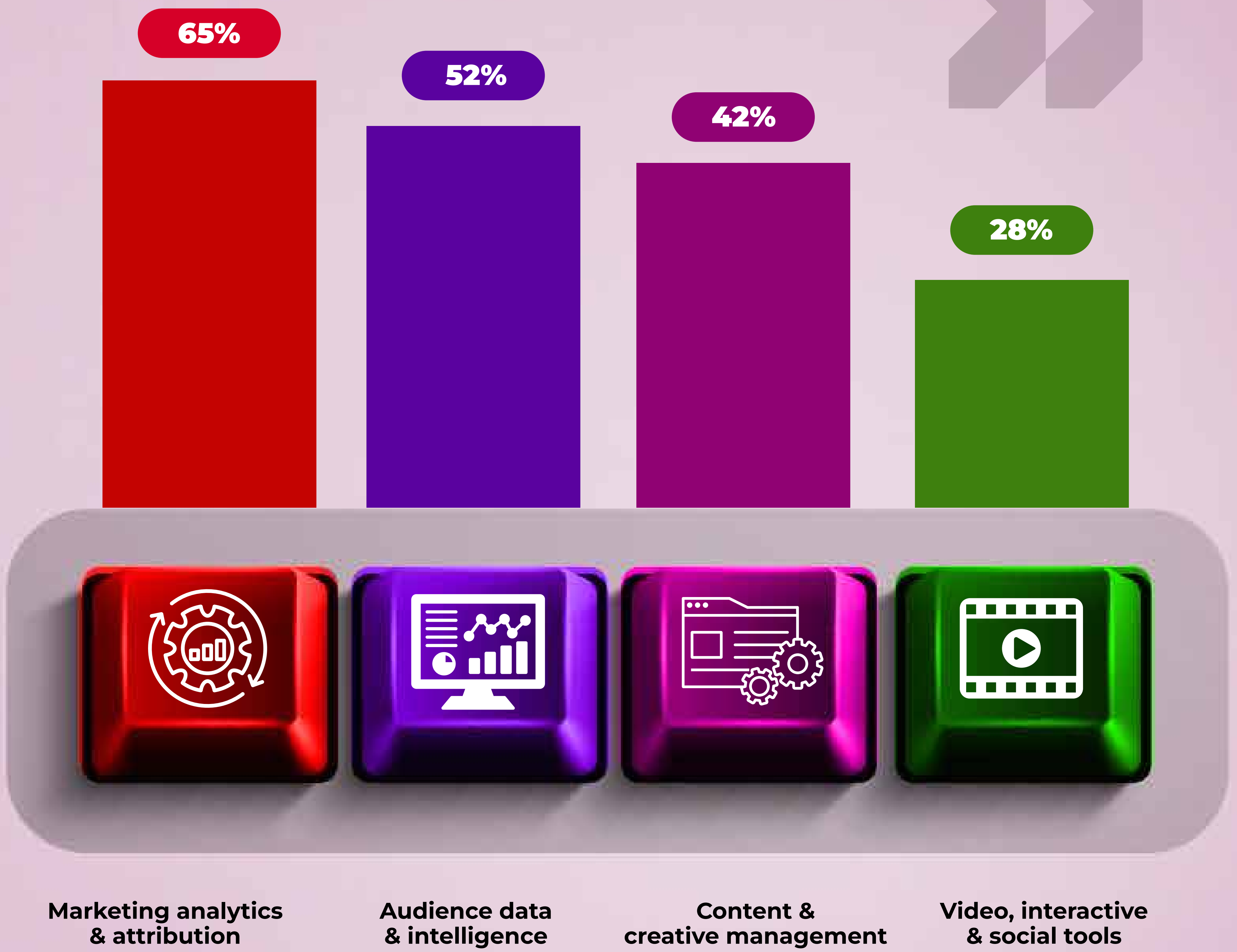
MARTECH PRIORITIES FOR 2026

Marketers are sharpening their martech focus around measurement, intelligence, and content-led effectiveness to drive smarter decision-making and scalable growth.

- **65.8% Marketing analytics, performance & attribution lead,** highlighting a focus on accountability and ROI.
- **52.6% Audience data & business intelligence follow,** highlighting the push to unify first- and third-party data to unlock deeper consumer insights and smarter decision-making.
- **42.1% Content & creative management come next,** emphasizing scaling quality and consistency.
- **28.9% Video, interactive content, personalisation & social tools** follow, pointing to growing investment in engagement and experience.



SECTION 5.1

EMERGING TECHNOLOGIES

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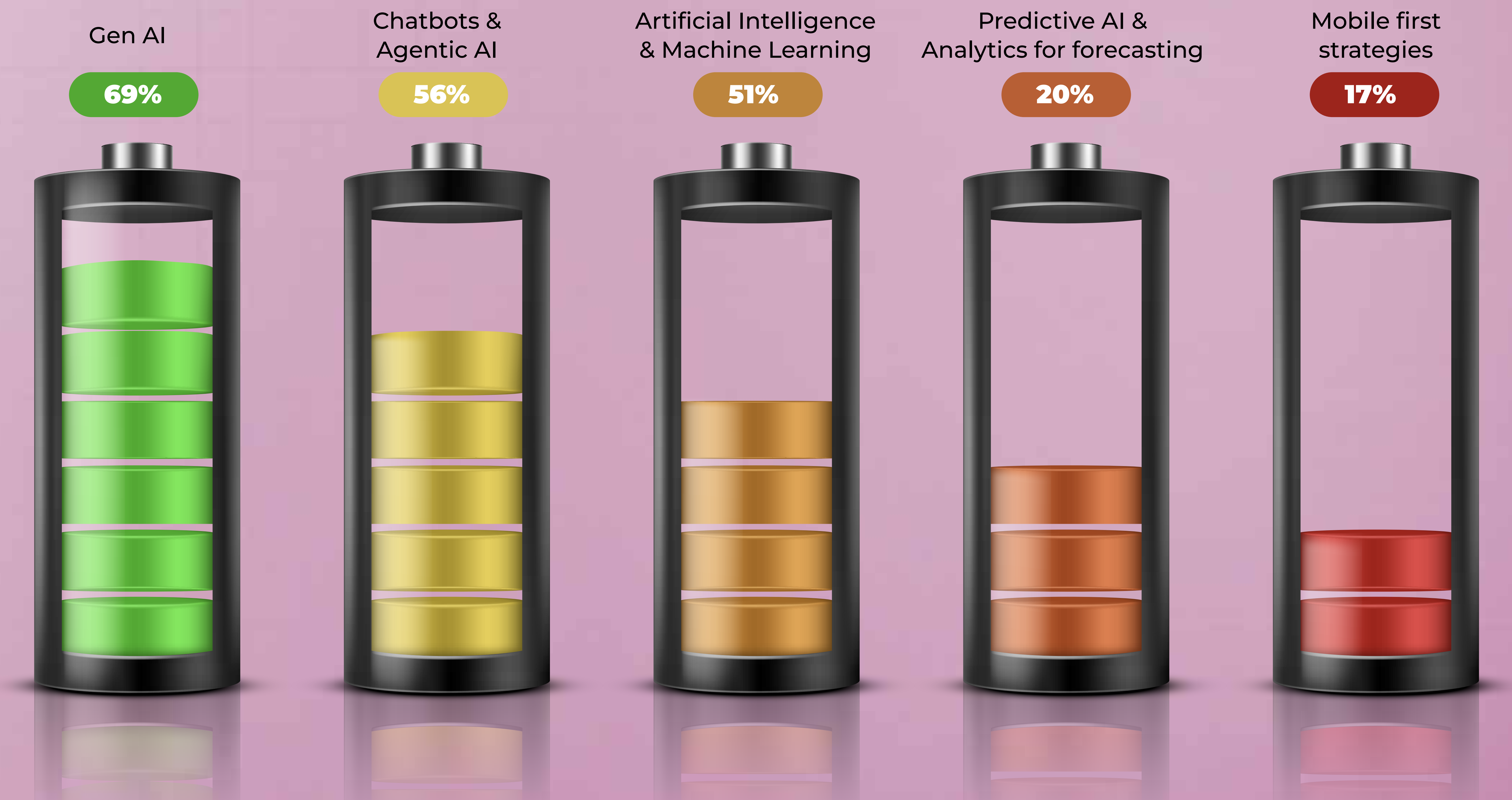
EMERGING TECHNOLOGY

INVESTMENTS IN 2026

With Gen AI leading at 69%, alongside chatbots and agentic AI at 56% and AI & ML at 51%, 2026 marks a clear shift from last year's data-led foundations to applied, AI-driven execution focused on automation, intelligence, and real-time impact.



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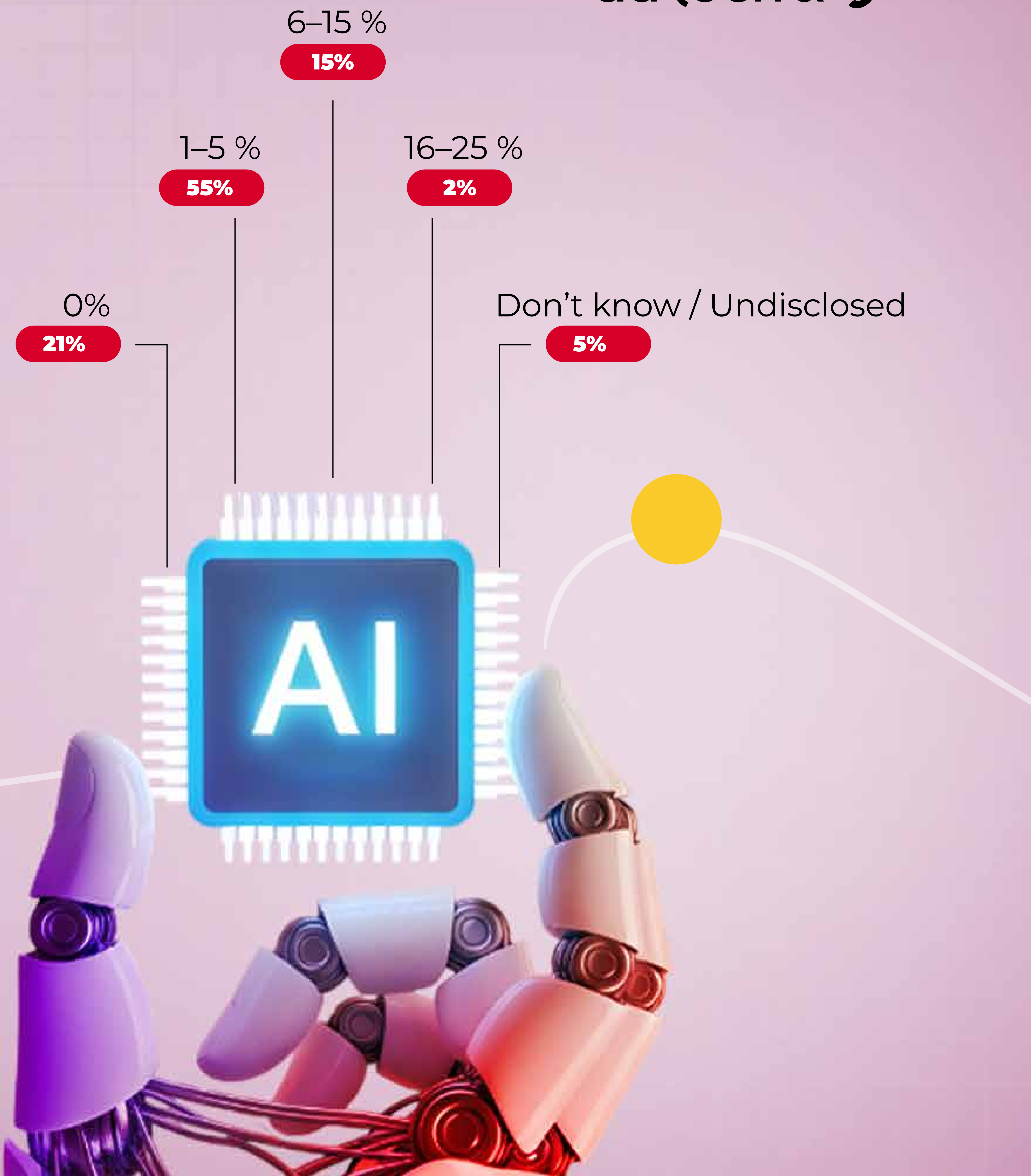
SECTION 5.1.1

GEN AI / AI

AI / GEN AI INVESTMENTS REMAIN EARLY-STAGE

- While interest in AI is growing, over half of marketers (55%) allocate only 1–5% of their marketing or martech budgets to AI/GenAI solutions, signalling cautious, pilot-led adoption.
- Another 21% report no allocation, highlighting that most brands are still experimenting and testing use cases and ROI before scaling, despite AI being a top future priority.

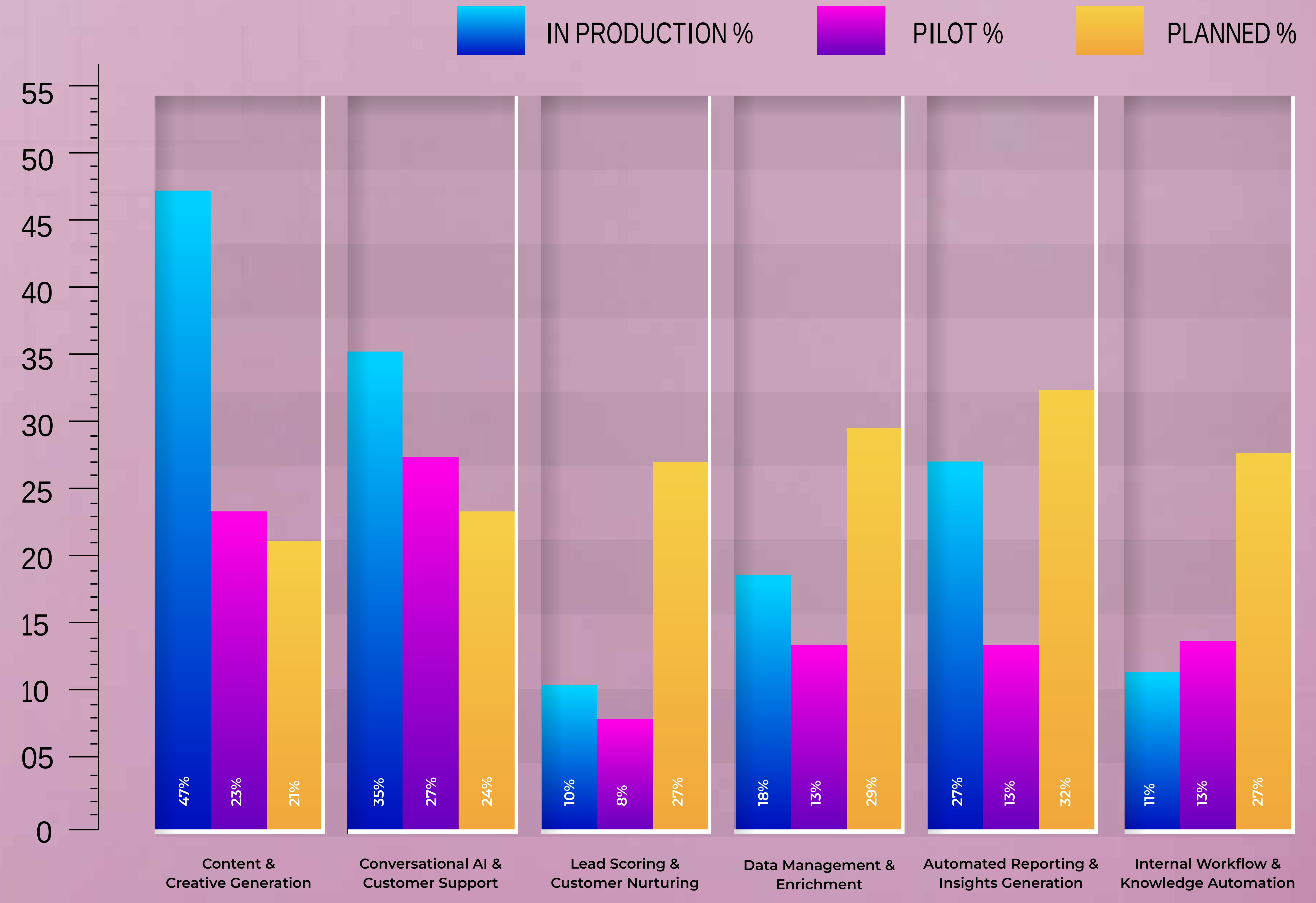


GEN AI USE CASES:
PRODUCTION, PILOT, PLANNED

- GenAI adoption is most advanced in content and creative generation, with nearly half of brands already in production.

- Automated reporting, conversational AI, and data management show strong momentum across production, pilot, and planned stages, while predictive analytics is primarily in planned stages, signalling active experimentation and future scale-up.

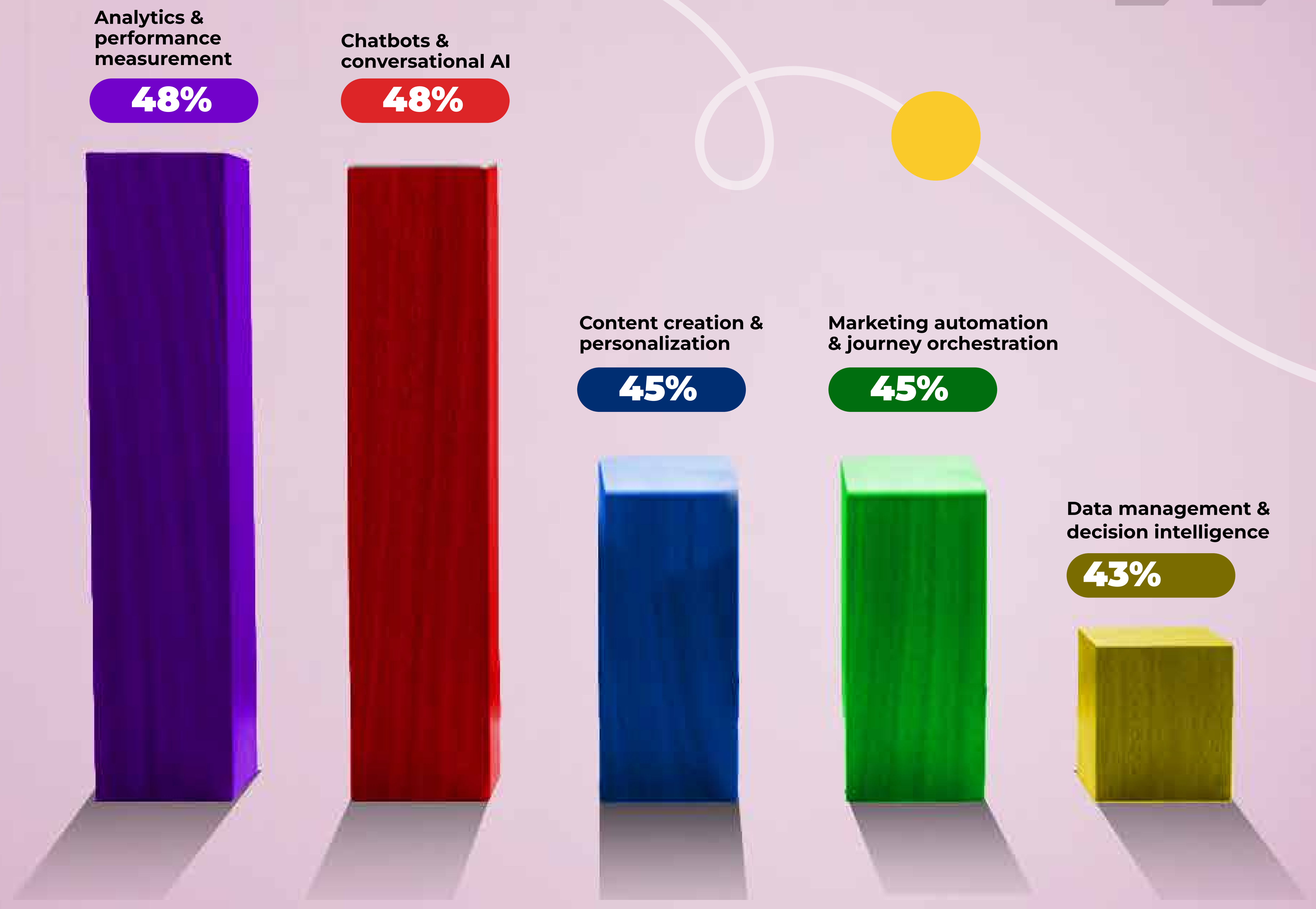
- In contrast, lead scoring, customer nurturing, and internal workflow automation remain early-stage or deprioritised, indicating caution around deeper operational use cases.



KEY NON GEN AI / TRADITIONAL AI & ML USE CASES

- Analytics & performance measurement, chatbots/conversational AI, and marketing automation & journey orchestration lead, highlighting AI's role in driving scalable, always-on customer engagement.

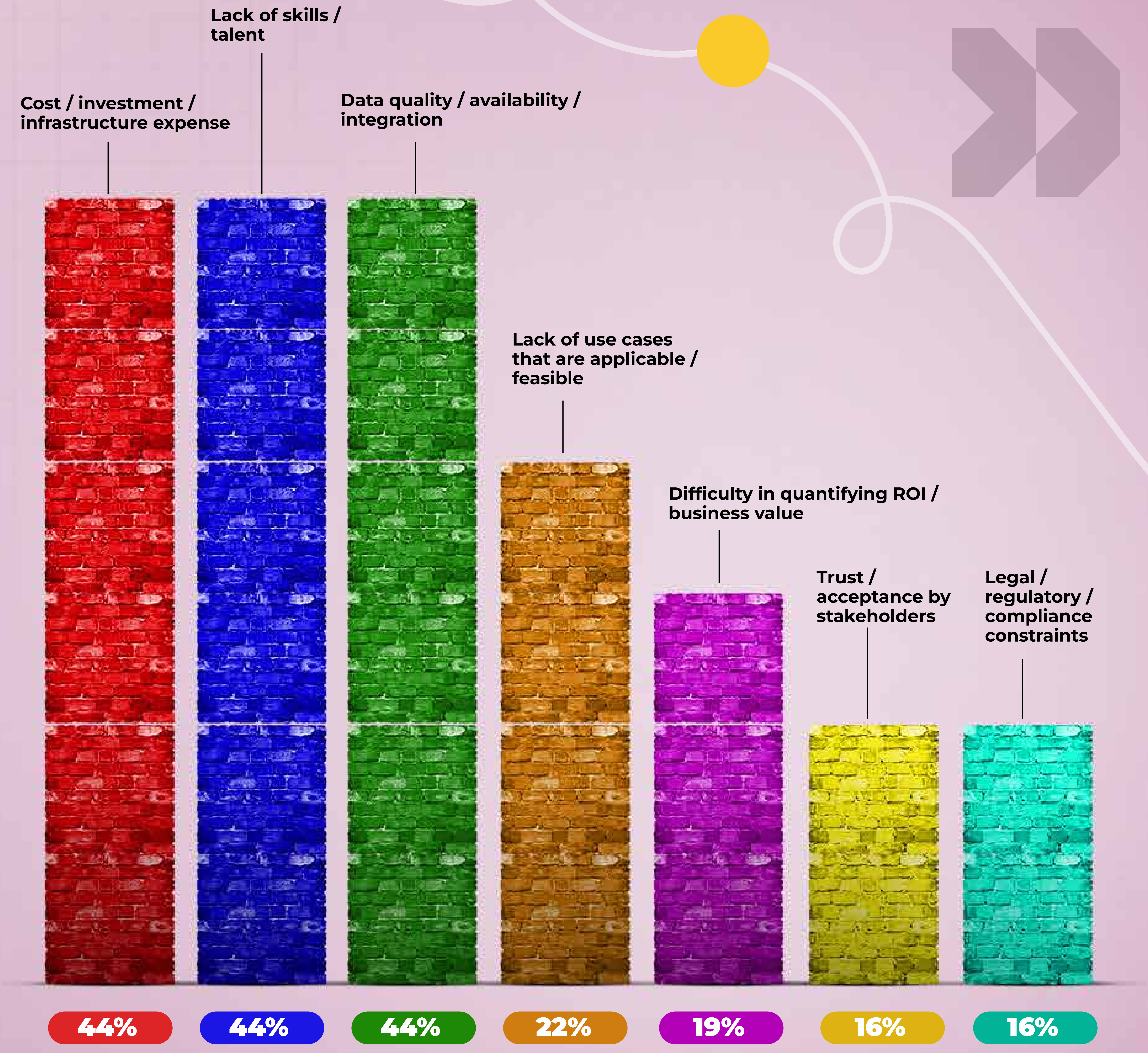
- This is supported by a strong focus on data management, decision intelligence, and content personalisation, while use cases like ad optimisation and consumer insights play complementary roles in improving efficiency and effectiveness across the marketing funnel.



TOP CHALLENGES IN SCALING AI / GENAI

- Cost and infrastructure, lack of skills, and data quality/integration all emerge as top challenges (44%), highlighting that investment readiness, capability, and clean data are equally critical barriers to AI adoption.

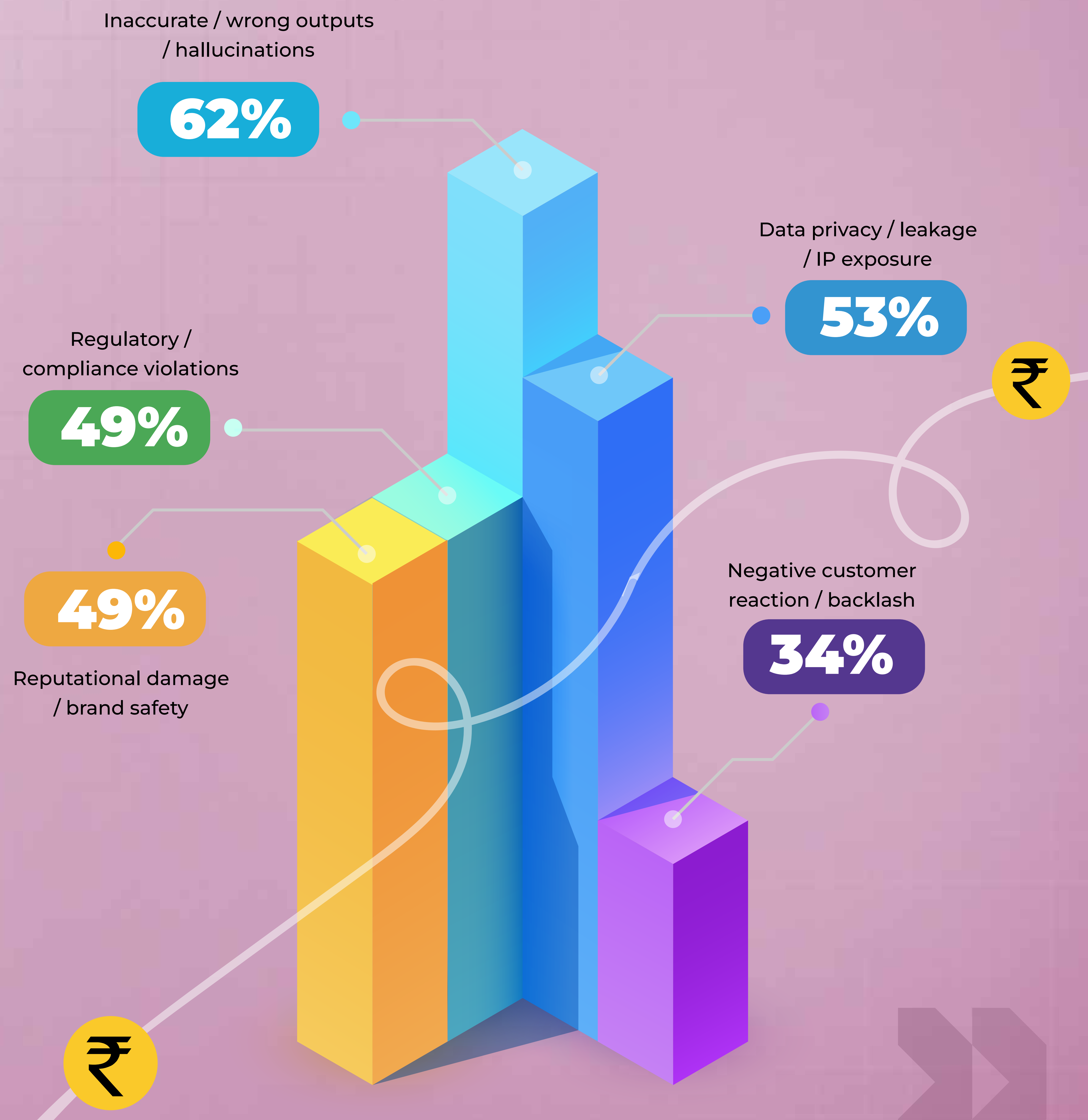
- Among secondary challenges, difficulty in quantifying ROI, legal/regulatory constraints, and stakeholder trust are most prominent, alongside vendor immaturity and internal resistance, showing that organisations continue to navigate the operational and governance complexities of scaling AI effectively.



AI / GENAI RISK PERCEPTION: KEY CONCERNS

- Concerns are led by inaccurate or hallucinated outputs, followed closely by data privacy, regulatory compliance, and brand safety, highlighting strong focus on trust, operational integrity, and reputational risk as AI scales.

- Potential customer backlash is also a notable concern, while job displacement, vendor lock-in, and bias are relatively lower priorities, indicating that organisations are primarily focused on immediate operational and reputational impact.



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METRICS TO EVALUATE AI / GEN AI ROI

- **67% of organisations track cost savings,** with 58% monitoring time efficiency - making these the top measures of AI success, followed by revenue uplift.

- Customer satisfaction and productivity gains are also considered, while accuracy, brand impact, and formal monetary ROI receive lower focus, reflecting an early-stage, outcome-first approach to AI measurement.

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