

2027

The State of *Programmatic* Advertising

What separates top performers as
marketing complexity grows



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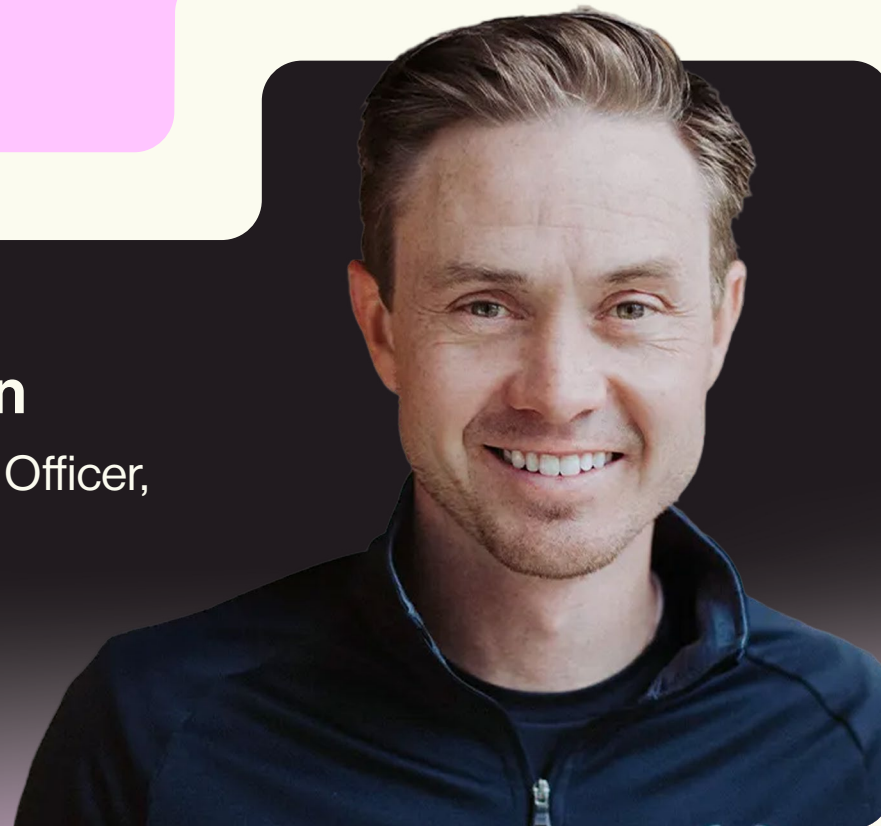
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A message from StackAdapt's CMO

Ryan Nelsen

Chief Marketing Officer,
StackAdapt



More channels, better customer data, new measurement approaches, and AI are expanding what marketers can do. They're also making marketing more complex.

That complexity is becoming difficult to avoid. Every new capability introduces more decisions and dependencies across audiences, budgets, teams, and technology. The opportunity ahead is to make those moving parts work together more effectively.

In *The State of Programmatic Advertising 2027*, we set out to understand how marketers are managing that complexity and what separates the strongest performers from the rest. The research shows that top-performing marketers are already doing this better. They're expanding across more channels, using more connected customer data, and strengthening their measurement foundations while reducing the fragmentation that can slow execution down.





The shift is what the report explores: from accumulating capabilities to making data, channels, measurement, and operations work together as marketing grows more sophisticated.

AI will make this even more important. As AI becomes more involved in marketing decisions, its value will depend on the context around it: the quality of the data it can draw from, the channels it can work across, the measurement that guides it, and whether teams are prepared to trust its recommendations and give it permission to act where appropriate.

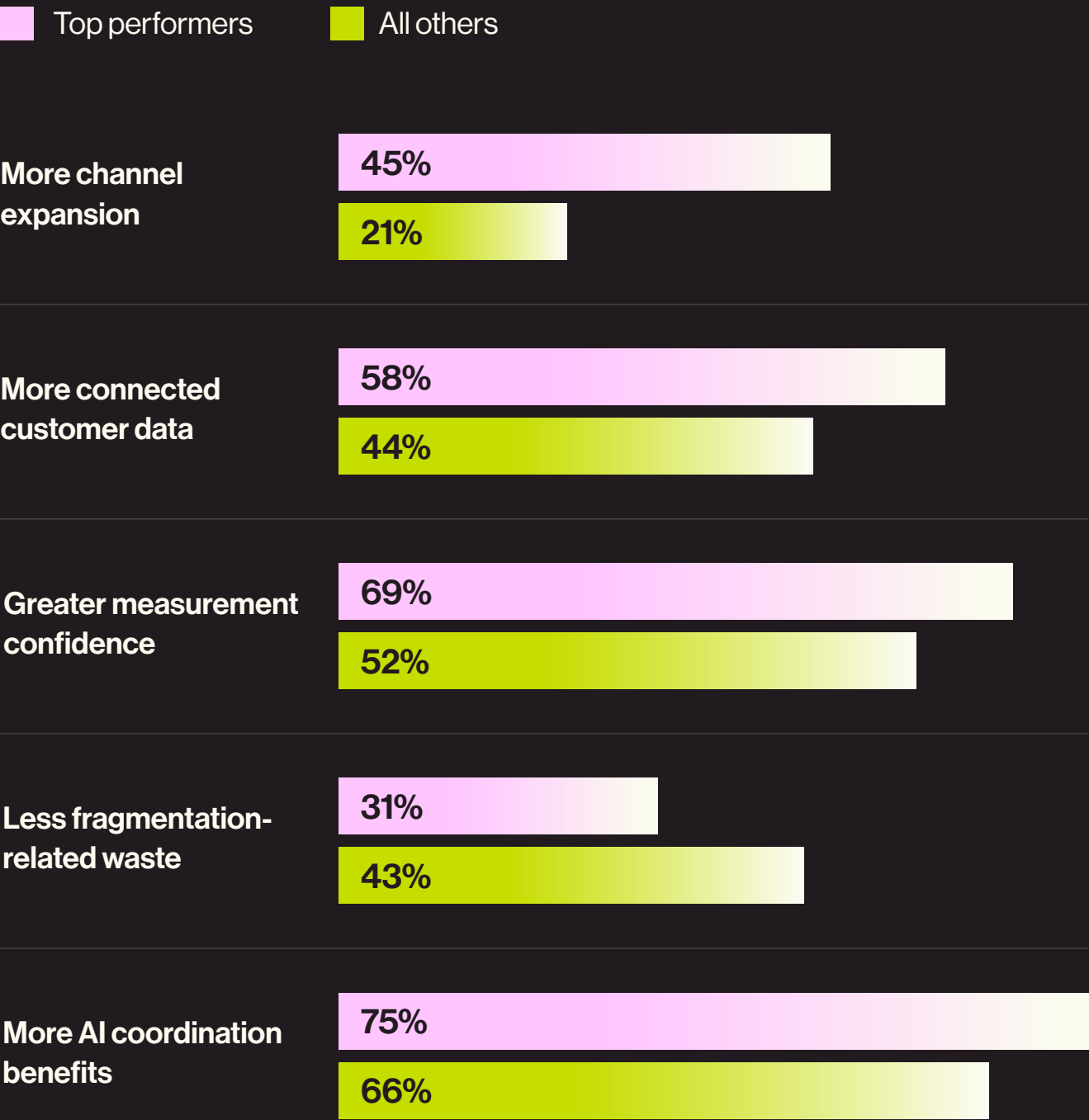
The marketers positioned to lead in 2027 will be those prepared to make complexity work for them, turning more decisions and dependencies into stronger performance instead of more fragmentation.

Ryan Nelsen

Chief Marketing Officer, StackAdapt

What top performers do differently

The strongest performers in our research (those who report significantly stronger performance over the past year) are taking on more complexity while also managing it more effectively.





Year-over-year benchmarks

For the past two years, StackAdapt's *State of Programmatic Advertising* report has tracked how marketers' priorities and practices are evolving.

For the 2027 report, we surveyed 885 senior marketing and advertising professionals globally, including 360 in North America, 300 in EMEA, and 225 in APAC.¹ We paired their perspectives with anonymized StackAdapt platform data and expert commentary, giving us a view into both what marketing leaders say they're prioritizing and how advertising strategies are evolving in practice.

Where questions are consistent across the two studies, we compare the 2026 and 2027 findings directly. Where the research differs, we use the latest findings to establish the current state of the market.²

The 2027 benchmarks point to a market where budget growth expectations and reported performance gains have cooled, even as marketers are thinking more ambitiously about what drives long-term growth. More marketers now see brand and performance working together as the strongest path to growth, but putting that belief into practice remains the challenge.

885

senior marketing and advertising professionals surveyed globally.

360

NORAM

300

EMEA

225

APAC

¹ See the Methodology section for a full breakdown of the countries and sample sizes.

² Because the two studies differ in geography and respondent qualifications, year-over-year comparisons should be interpreted directionally rather than as changes within the same population. Data for the 2026 report was collected in 2025, and data for the 2027 report was collected in 2026.



How the benchmarks shifted

THEME	2026 REPORT → 2027 REPORT		THE SHIFT
Investment outlook	75% expected budgets to increase in 2026	↘	63% expect budgets to increase in 2027 Budget growth expectations have cooled, although most marketers still expect investment to rise.
Marketing performance	84% reported stronger performance YoY	↘	65% report stronger performance YoY The current survey points to a more measured performance picture, with fewer marketers reporting year-over-year gains than in the prior benchmark.
Belief in brand and performance balance	38% believed balance would drive long-term growth	↗	60% believe balance will drive the most growth and impact Marketers increasingly see that long-term growth needs brand to create future demand and performance to convert it.



How the benchmarks shifted (continued)

THEME	2026 REPORT → 2027 REPORT			THE SHIFT
Performance prioritization	75% prioritized performance over brand building	↗	79% report doing the same	Investment behavior has barely moved despite stronger belief in the importance of balancing brand and performance.
Severe fragmentation-related waste	11% estimated 30%+ of programmatic budget wasted	=	11% estimate the same	Fragmentation-related waste remains unchanged despite expanding marketing capabilities.



The year-over-year shifts aren't uniform across the market. Mid-spend marketers are more optimistic about future investment than high-spend marketers: 70% expect budgets to grow, compared with 58% of high-spend marketers.⁴

Meanwhile, the belief in balancing brand and performance is particularly strong among agencies, with 61% saying this balance will drive the greatest long-term growth, even as 83% say their clients have prioritized performance over brand.

Taken together, the benchmarks show an industry whose thinking and capabilities are evolving faster than some of its behaviors.

These benchmarks point to a market in transition, but the bigger changes show where that transition is creating new pressure—and separating leaders from the rest.

⁴ Mid-spend refers to advertisers with annual paid advertising and media spend of \$121,000 to \$10 million USD; high-spend refers to advertisers spending more than \$10 million USD annually; and low-spend refers to advertisers spending under \$121,000 USD annually.



83%

of agencies say their clients have
prioritized performance over brand



Regional perspective: Complexity is global, but the pressure points differ.

Marketing complexity is a global challenge, but the conditions around it vary by region.

While APAC leads in AI optimism and growth momentum, operational complexity remains a hurdle: over 90% of regional teams operate in fragmented data silos while managing rapidly expanding media touchpoints.

NORAM marketers also report relatively strong budget growth and AI coordination gains, pointing to a market with more room to keep expanding capabilities.

EMEA is focused on making existing investment work harder amid economic pressures. The opportunity is to reduce waste through stronger cross-channel coordination, clearer measurement, and better alignment between marketing, media, and commercial teams.

How performance and coordination differ by region

■ NORAM ■ EMEA ■ APAC

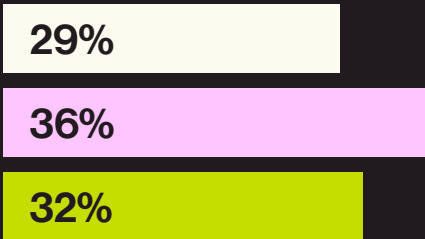
Report stronger YoY performance



Say AI improved cross-channel coordination



Say complexity has increased faster than performance





TREND 1

**Marketing is *outgrowing*
single-system measurement**



What the data shows

Multi-method measurement is already common, while fully unified measurement remains rare. Marketers are using a broad mix of approaches, with platform-reported attribution and marketing mix modeling (MMM) the most prevalent, followed by multi-touch attribution (MTA), cross-channel attribution (CCA), last-touch attribution, and incrementality testing.

7%

of marketers have a fully unified measurement strategy

8%

rely primarily on a single measurement methodology

42%

use multiple measurement methodologies independently

40%

triangulate multiple approaches to inform decisions⁵

Measurement adoption is higher among advertisers with greater ad spend in the latest platform data: 69% of advertisers spending more than \$10 million annually used at least one measurement method, compared with 56% of those spending \$10 million or less. This shows that high-spend advertisers are more likely to activate platform measurement capabilities, giving them more ways to understand what's driving performance as campaigns grow and become increasingly complex.

⁵ Remaining respondents (3%) selected "unsure" or said they don't have a formal measurement approach.

Marketers are measuring performance through multiple lenses*

Platform-reported attribution

57%

Marketing mix modeling

54%

Multi-touch attribution

38%

Cross-channel attribution

36%

Last-touch attribution

34%

Incrementality testing

29%

* Respondents could select all that apply.



Why it matters

No single methodology provides a complete view across channels, funnel stages, customer journeys, and business goals. As marketers rely on more forms of measurement, the challenge becomes deciding which evidence is best suited to each decision and how to interpret those inputs together. The goal is a clearer framework for turning multiple measurement methods into better decisions.

The survey shows where that becomes difficult. Thirty-seven percent say conflicting results across measurement systems make it harder to trust the results. But disagreement is only part of the problem.

One of the more surprising findings is what ranks last: privacy and signal loss, at just 15%. That doesn't mean privacy and signal loss have disappeared. Marketers have had years to adapt through first-party data strategies, modeled measurement, and other ways of filling gaps left by reduced tracking and identifiers.

As those practices have become more common, the measurement challenge appears to be shifting. The bigger issue now is less whether marketers have signals available and more how they interpret and reconcile that information when results conflict, customer journeys are incomplete, or data quality issues make performance harder to understand.

Where measurement confidence breaks down

Data quality and attribution

48%

Offline measurement

43%

Incomplete customer journey

41%

Conflicting measurement systems

37%

Too many metrics or reporting sources

31%

Limited connection to business outcomes

26%

Lack of executive alignment

26%

Privacy and signal loss

15%



What this points to next

No single approach can give agencies and brands a definitive answer to every question they face. Increasingly, that will mean using different methodologies depending on what they're trying to understand.



This will raise the bar for measurement maturity. Marketers will need to understand what each methodology can tell them, determine which evidence is most appropriate for a particular decision, and reconcile credible evidence when different approaches produce different answers. In many organizations, that will also require internal alignment: teams will need to move stakeholders beyond a single-model mindset and build agreement around which evidence should guide which decisions.



Cross-channel attribution users report stronger performance and less fragmentation

CCA helps advertisers understand how channels contribute across the customer journey, giving them more context to optimize spend, sequencing, and campaign strategy. It doesn't replace other measurement approaches, but it can provide a more complete view of performance as part of a broader measurement framework.

Our research shows that marketers using CCA report stronger performance, greater measurement confidence, more frequent omnichannel execution, and less fragmentation-related waste than non-users. StackAdapt platform data shows a similar pattern: CCA users were associated with stronger reported coordination and lower aggregate CPC and CPA than non-users.

These findings are directional rather than causal. CCA users may differ in scale, channel mix, and measurement maturity, but the pattern is consistent across both survey and platform data: advertisers using CCA report stronger coordination and show lower aggregate click and acquisition costs, which may partly reflect a better ability to compare channel performance and use those insights when deciding where to invest and what to optimize.

CCA users report stronger performance, confidence, and coordination

■ CCA users ■ Non-users

Stronger YoY performance



High confidence connecting ad investment to results



Frequently or almost-always run omnichannel



More than 20% fragmentation-related waste





AI raises the value of stronger measurement foundations

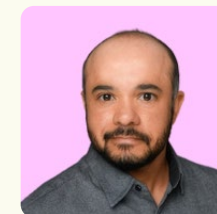
Marketers with more mature measurement approaches are more likely to report improved cross-channel coordination from AI (73% versus 61%). The gap is even wider among marketers with high confidence connecting ads to results (76% versus 56%).

AI can help marketers connect channel performance, audience behavior, creative performance, and business outcomes, but its recommendations are only as useful as the measurement framework guiding them.

Expert commentary



Attribution can guide daily optimization, incrementality testing can establish causality, and MMM can inform budget allocation. Because they answer different questions, disagreement is a feature, not a bug, of a strong measurement strategy. Privacy hasn't disappeared as a measurement constraint, but marketers have developed workarounds for signal loss. The harder problem is making sense of the signals they do have as media fragments and more of the customer journey moves through offline and AI-mediated environments. AI can help reconcile these different forms of evidence, but it also raises the cost of poor data and flawed measurement foundations.



Jacob Bourne
Analyst, Technology, EMARKETER



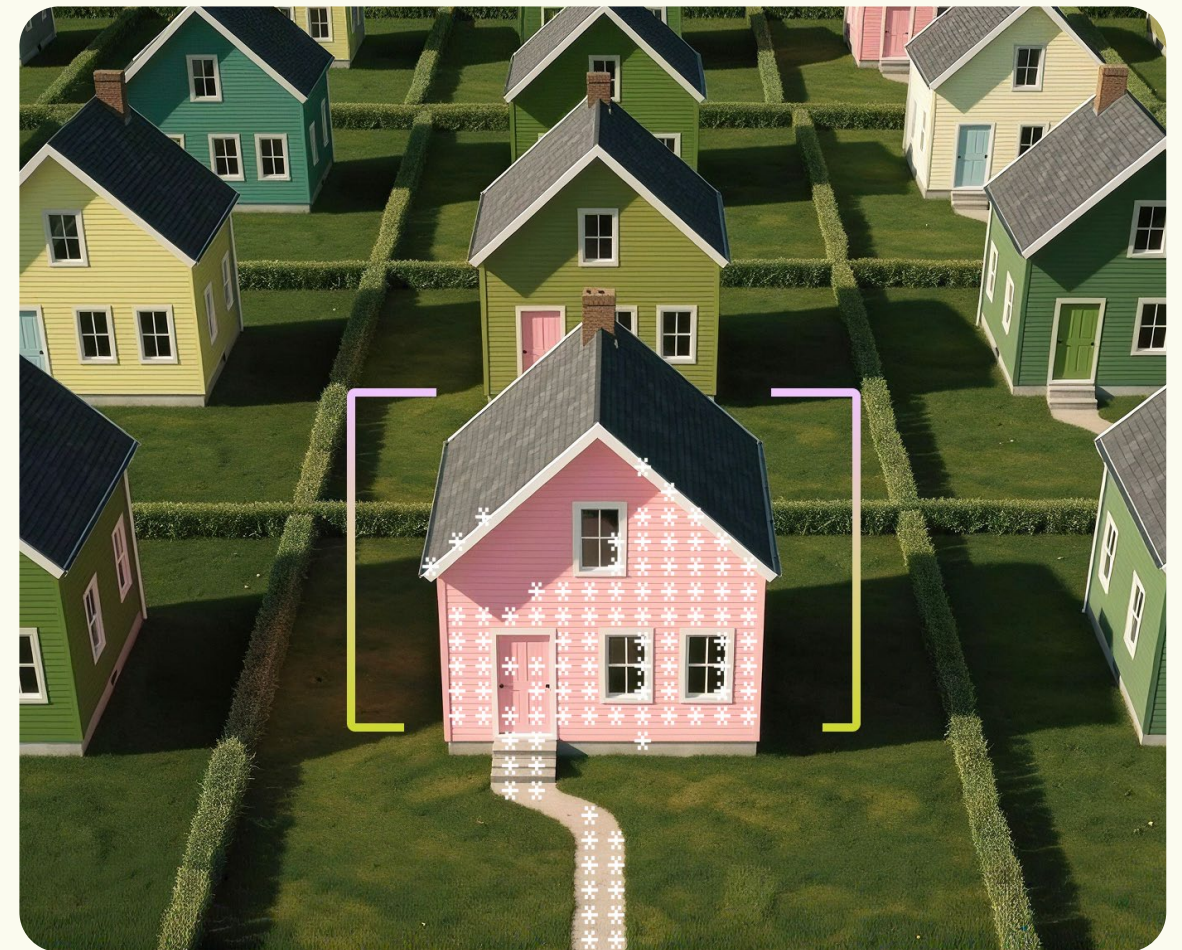
Case Study

Connecting measurement to the outcome that matters

An emerging pharmaceutical brand needed to understand whether its advertising strategy was moving prospective patients from awareness toward consideration and, ultimately, supporting prescription growth. As the campaign expanded across connected TV (CTV), online video, display, and native advertising, the team used different measurement approaches to understand different stages of that journey.

The brand combined CCA, brand lift data, engagement insights, Google Analytics, and privacy-safe prescription data to connect media activity more closely to prescription trends. That fuller view helped the team identify high-performing ZIP codes and providers, avoid prematurely classifying markets as high- or low-performing, and shift investment toward areas showing sustained prescription growth.

As a result, cost per new prescription fell 60% over the measurement period, showing how stronger measurement can help marketers make better-informed decisions about where to invest and what to optimize.



Cost per new prescription decrease

↓ 60%



TREND 2

The next channel
doesn't guarantee the
next performance gain



What the data shows

Channel expansion is widespread, but coordinated execution hasn't kept pace. Most marketers have broadened their media mix over the past two to three years, while truly omnichannel campaigns (consistently planning, executing, and measuring those channels as one strategy) remain much less common.

41% of all respondents fall directly into this gap: they've expanded their channel mix, but they still aren't consistently coordinating omnichannel campaigns.

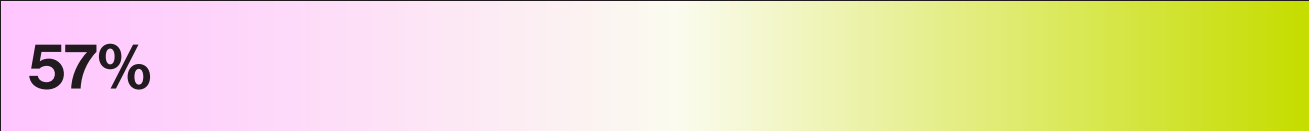
Channel expansion is outpacing coordinated execution





Reasons for wasted or underperforming ad budget

Inconsistent measurement across channels



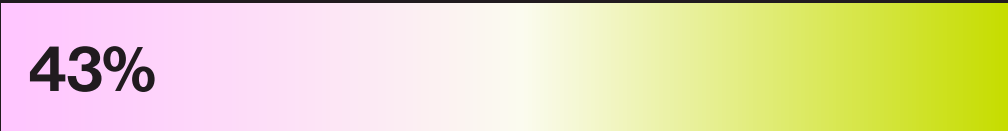
Incomplete understanding of customer journeys across touch points



Uncoordinated audience strategy across channels



Channel-by-channel budget optimization



Why it matters

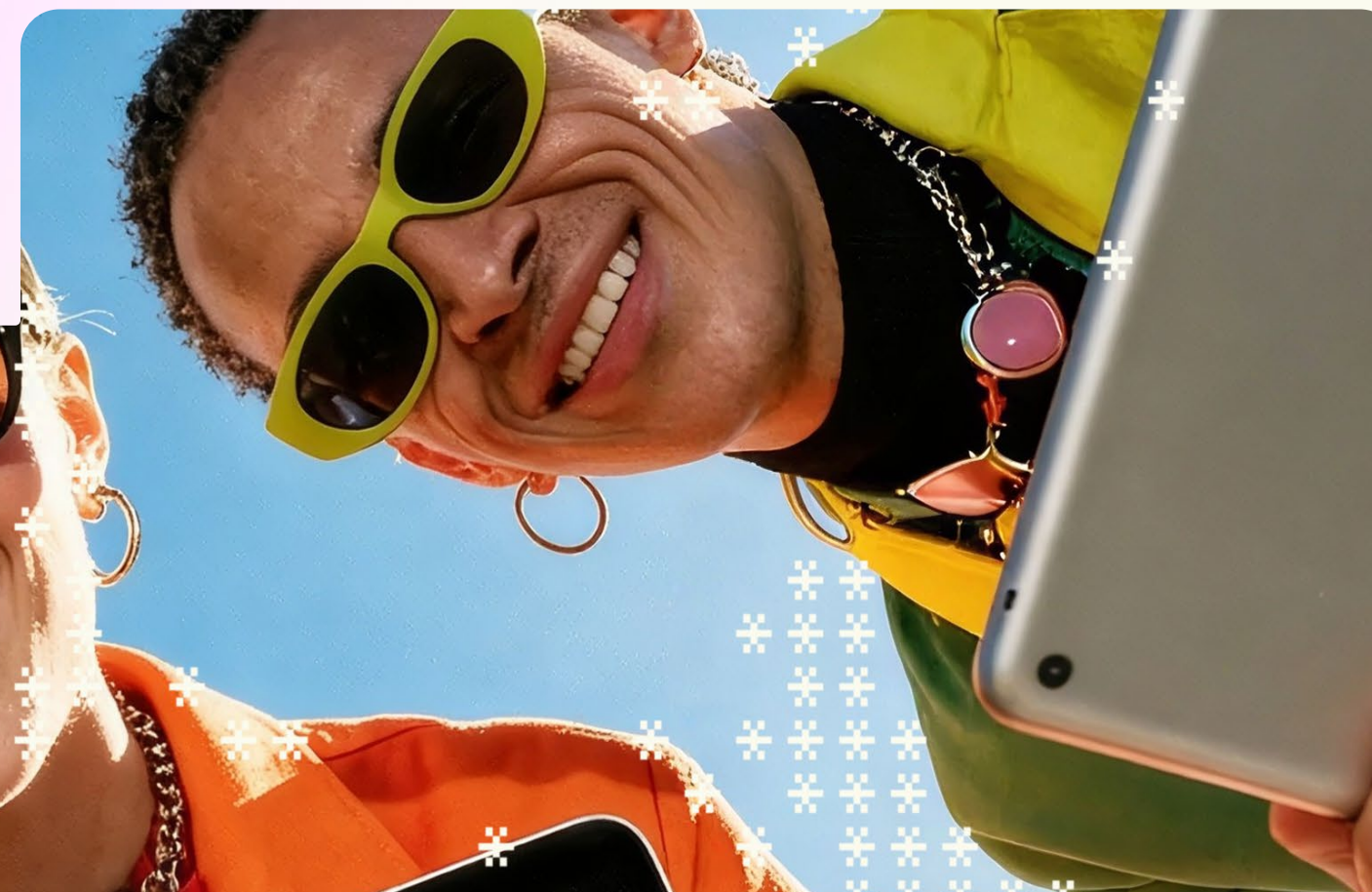
As channel portfolios grow, the number of decisions that need to work together grows with them.

Targeting strategy, budget allocation, creative, measurement, and optimization all have to work across a broader media mix. When those decisions remain separated by channel, greater breadth can sometimes create more opportunities for fragmentation rather than automatically producing greater value.

That fragmentation is also reflected in perceived budget waste. Forty-two percent of marketers estimate that more than 20% of their programmatic budget is wasted or underperforming because of siloed or fragmented channel execution. Eleven percent estimate even higher levels of waste, saying more than 30% is wasted or underperforming, the same share reported in last year's benchmark.



Capabilities don't always extend across the media mix



StackAdapt platform data shows that more advertisers are using five or more channels year over year, while high-spend advertisers use a broader set of platform features overall. But feature adoption still varies by channel, so adding more channels and capabilities doesn't automatically translate into better coordination across the media mix. Advertisers need to be deliberate about where and how they use audience targeting, first-party data, measurement methods, and optimization tools, based on what the campaign is trying to achieve.



Scale changes where coordination breaks down

The barriers marketers report change with the amount they spend. Mid-spend marketers are more likely than high-spend marketers to cite data silos as the top factor preventing a truly omnichannel strategy (41% vs. 32%) and are also more likely to cite budget constraints (14% vs. 7%). High-spend marketers, by contrast, are more likely to cite organizational silos (28% vs. 16%) and technology limitations (23% vs. 17%).

Those findings suggest coordination can be constrained in different ways as marketing organizations scale. Mid-spend organizations may still be building the data connections and budget flexibility needed to coordinate across channels. High-spend organizations may have more capabilities in place, but also more teams, systems, and decisions they need to keep aligned.





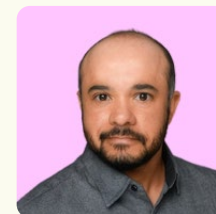
What this points to next

As media portfolios broaden, the advantage will increasingly depend on how effectively advertisers coordinate the channels they use. Adding another channel expands what marketers can do, but getting the most from that added reach requires audiences, budgets, creative, measurement, and optimization to work across the media mix. As AI becomes involved in more campaign decisions, the quality of that underlying coordination will become even more important.

Expert commentary



Every new channel comes with its own learning curve. Audience behavior varies by channel, as do buying mechanics, measurement approaches, and effective ad formats. Because of these differences, adding channels increases complexity without automatically improving reach or performance. Marketers need to understand where their audiences actually spend time and build the expertise needed to use new channels effectively. Adding channels for the sake of chasing what's new doesn't create an advantage. The focus should be building a media mix in which each channel has a defined role and works with the broader strategy.



Jacob Bourne
Analyst, Technology, EMARKETER



Case Study

Connecting channels through the customer journey

Urban Sports Club wanted to build awareness among businesses in Cologne while reaching the same prospects across multiple touch points. Working with StackAdapt, the company launched digital out-of-home (DOOH), native, and display ads to reach decision-makers across both physical and digital environments, supported by account-based marketing, contextual targeting, and retargeting.

The campaign generated 9.83 million impressions, while website traffic and keyword searches both increased by 50%. The results show how combining local DOOH ads with other digital channels can extend an awareness campaign beyond the initial exposure and drive further engagement online.



Website traffic and keyword searches increased

↑ 50%



TREND 3

**Bigger budgets raise
the *coordination* burden**

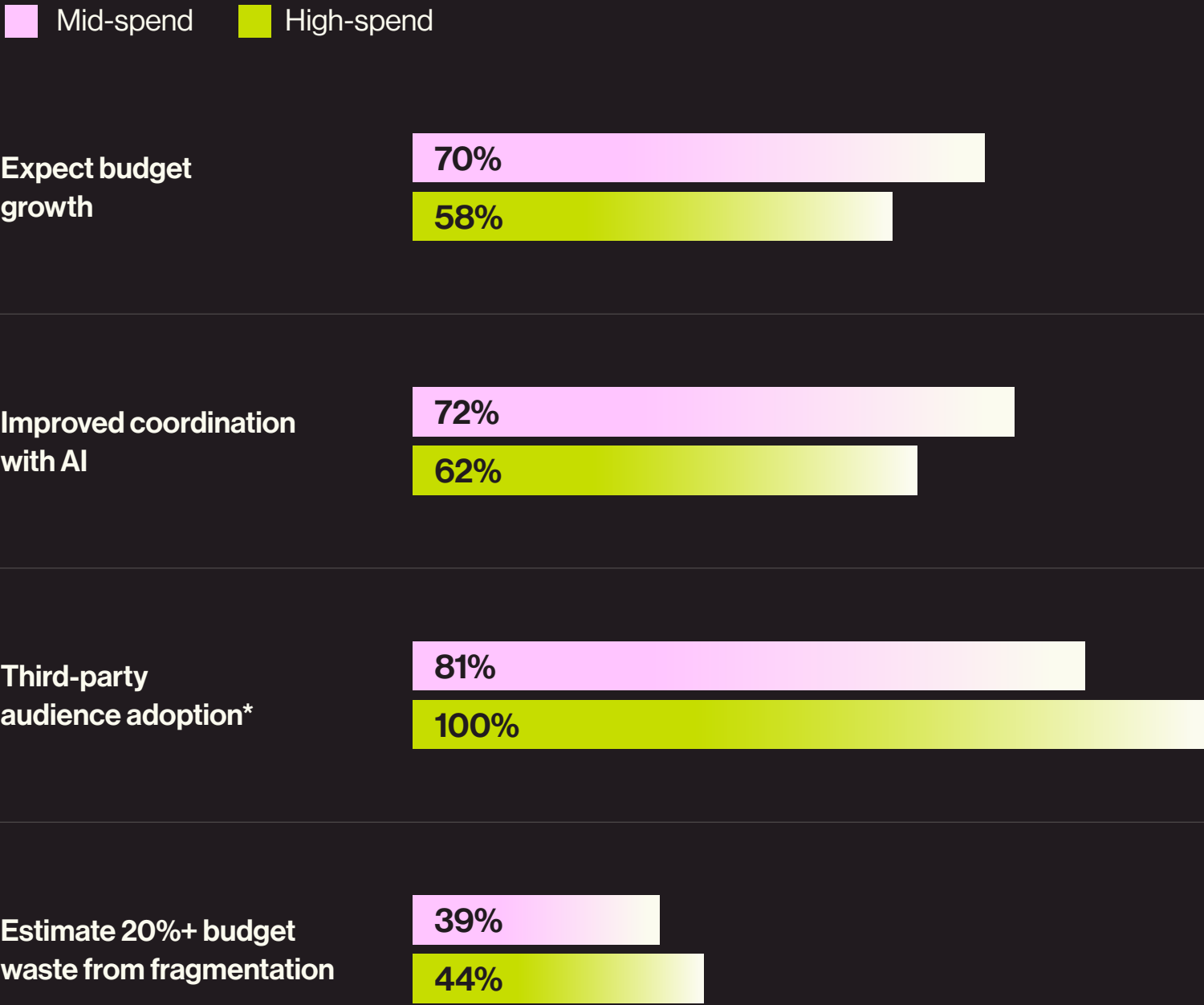


What the data shows

Advertisers with bigger budgets tend to have access to more capabilities, and more to coordinate. StackAdapt platform data shows that high-spend advertisers use more platform features, operate across more channels, and adopt more audience capabilities than mid-spend advertisers.

As the range of available tools and strategies expands, so does the need to keep teams, workflows, channels, and decisions aligned.

Bigger budgets bring more capability, and more to coordinate



* StackAdapt platform data uses lifetime spend tiers. Survey and platform data are separate.



Why it matters



Greater investment gives marketing organizations access to more technology, data, channels, and specialist expertise. But as the operating environment expands, so does the number of decisions that need to stay aligned.

For organizations with lower budgets, the challenge may be building the data, workflows, and measurement practices needed to take full advantage of available capabilities. For organizations with larger budgets, the challenge shifts toward coordination: more channels, more audience strategies, more platform features, more governance requirements, and more teams involved in execution. Bigger budgets can expand what marketers can access, but they also make it harder to keep execution aligned across channels and teams.



What this points to next

As additional marketing capabilities become more widely available, the advantage of scale will depend less on access alone and more on how well organizations can coordinate what they have.

For larger marketing organizations, the opportunity is to design operating models that preserve speed as complexity grows. That could mean giving teams clearer decision authority, reducing unnecessary handoffs, creating shared ways of working across channels, and using technology and AI to reduce the manual work required to coordinate campaigns.

This could also change how marketing leaders evaluate operating models. Efficiency will still matter, but so will the ability to move quickly from insight to decision to execution across a complex marketing operation. The organizations that preserve that ability as they grow will be better positioned to make scale an advantage.

Expert commentary



Mid-market organizations occupy a sweet spot. They have enough resources and expertise to experiment with new capabilities without the organizational complexity that can slow larger companies. As organizations scale, more stakeholders, handoffs, and decision layers can turn greater resources into friction. Large organizations can counter that by aligning teams around shared goals while giving smaller, specialized teams flexibility to make nimble decisions that drive progress. Shared goals and clear strategies equip individual teams to act effectively within their own operating context.



Jacob Bourne
Analyst, Technology, EMARKETER



TREND 4

Connected *customer data*
is becoming marketing's
performance divide



What the data shows

Most marketers still haven’t connected their first-party customer and prospect data across the full customer lifecycle. Only 45% describe their data as mostly or fully connected across acquisition, conversion, and retention, leaving many teams without a consistent view of customers across the journey.

The benefits associated with more connected customer data extend well beyond data management. Marketers with better connectivity report stronger performance, greater confidence connecting ads to results, more consistent omnichannel execution, and greater improvement in cross-channel coordination with AI. They’re also less likely to report significant budget waste from fragmented execution.

Connected customer data is becoming a performance advantage

	CONNECTED	LESS CONNECTED	ADVANTAGE*
High measurement confidence	69%	41%	+28 pts
Improved coordination with AI	79%	58%	+21 pts
Frequently or almost always run omnichannel	61%	41%	+20 pts
Stronger YoY performance	74%	59%	+15 pts
Expect budget growth	69%	59%	+10 pts
Triangulated/unified measurement	52%	43%	+9 pts
Lower fragmentation-related budget waste	65%	52%	+13 pts

* “Points” refers to the percentage-point difference between marketers with connected customer data and those with less connected customer data.



First-party data maturity has two dimensions

Dimension 1

Activation

Can marketers put their first-party data to work?

Dimension 2

Connectivity

Can customer data work across acquisition, conversion, and retention?

What the data shows

The first-party data conversation has traditionally emphasized collection and activation: acquiring customer data, building audiences from it, and putting those audiences to work in campaigns. The findings suggest that connectivity across the customer lifecycle is another important dimension of data maturity.

StackAdapt platform data shows high first-party data activation across spend tiers: 56% among low-spend advertisers, 86% among mid-spend advertisers, and 93% among high-spend advertisers. Taken together with the survey findings, this suggests first-party data maturity has two dimensions: activation and connectivity. Activation shows whether marketers can put their data to work in campaigns; connectivity determines whether that data can provide context across acquisition, conversion, and retention.



What this points to next

The next phase of first-party data maturity may be defined less by how much customer data marketers can collect and more by how effectively they can make that data useful across the customer lifecycle.

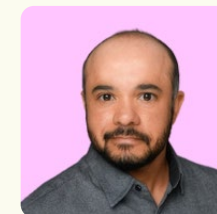
As marketing organizations add channels, measurement approaches, and AI-assisted decision-making, connected customer data becomes more than an audience activation tool. It gives teams a shared view of the customer that can inform media planning, measurement, optimization, and lifecycle decisions.

In 2027, the bigger opportunity will be using connected customer data as decision infrastructure. Marketing organizations that can connect data across acquisition, conversion, and retention will be better positioned to understand which audiences to prioritize, which channels are contributing, where customers are moving next, and how to coordinate investment across the full lifecycle.

Expert commentary



Data connectivity is both a marker of marketing maturity and a contributor to better outcomes. When customer data connects across the lifecycle, marketers can see how acquisition affects conversion and retention, and then feed those insights back into planning and activation. That creates a powerful learning feedback loop that siloed data can't provide. AI can accelerate that loop by finding patterns and recommending actions at a much greater scale. As AI scales those decisions, marketers should prioritize the breadth, quality, and connectivity of the customer data feeding the models.



Jacob Bourne
Analyst, Technology, EMARKETER



Build the *ability* to coordinate modern advertising

The findings across this report point to a broader organizational need as advertising becomes more complex: the ability to coordinate more effectively across teams, channels, data, and measurement. As each of those areas becomes more complex, performance increasingly depends on how well they work together.

The research points to four building blocks marketers need to develop to bring these areas together:

- 1.*

Use customer data across the lifecycle.

Connect first-party customer and prospect data across acquisition, conversion, retention, and post-purchase to support the full lifecycle.
- 2.*

Make omnichannel work as one strategy.

Coordinate audiences, creative, budgets, optimization, and measurement across channels so the full media mix works as one strategy.
- 3.*

Turn more evidence into clearer decisions.

Determine which measurement approaches should guide strategic decisions, campaign optimization, and budget allocation when results differ.
- 4.*

Turn capabilities into coordinated action.

Coordinate teams, workflows, technology, and decision-making so greater marketing sophistication can translate into efficient execution.



AI expands marketers' capacity to coordinate

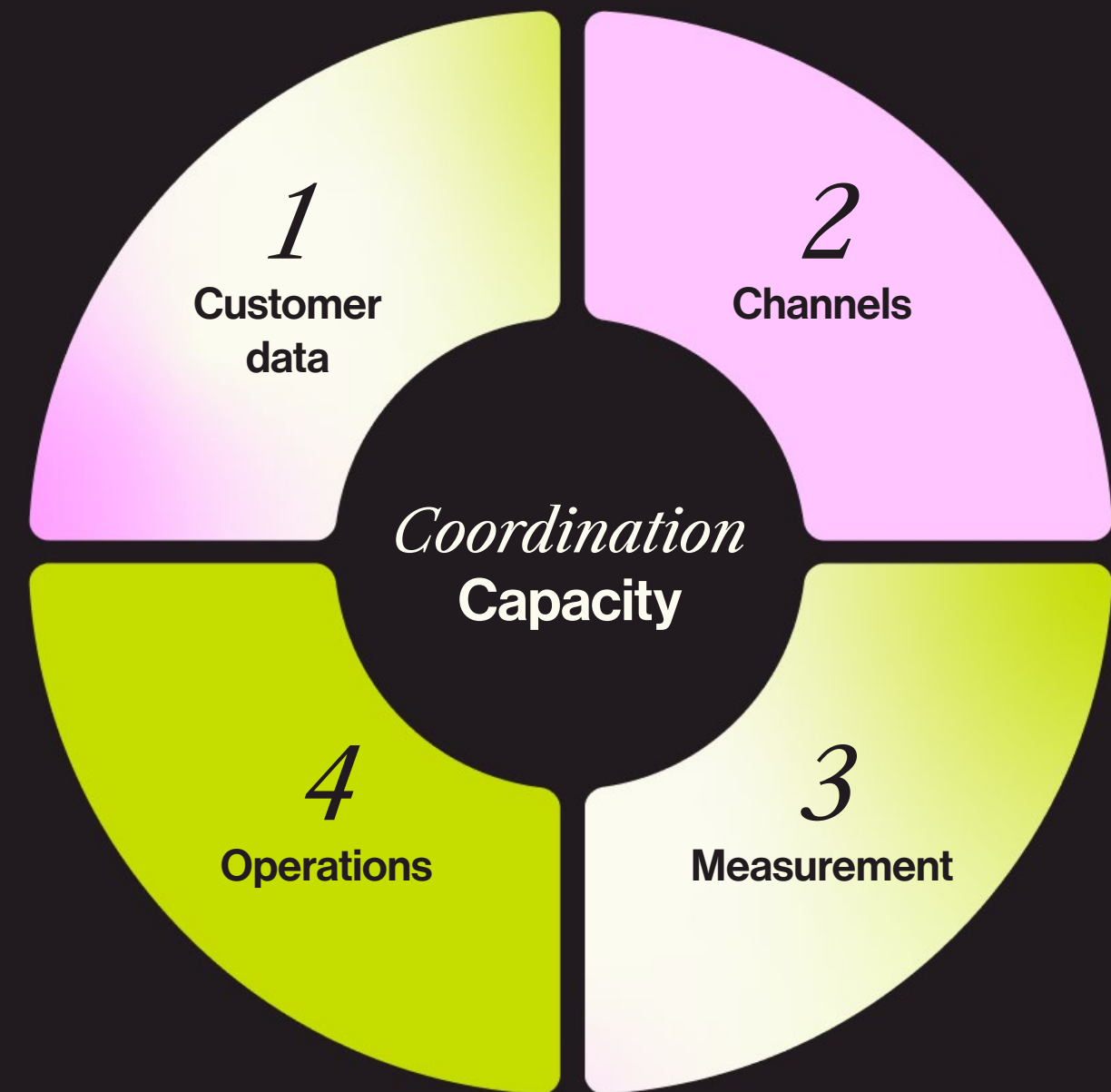
AI can help marketers coordinate campaigns more effectively—but it needs the right context.

By connecting intelligence across customer data, channels, operations, and measurement, AI can expand marketers' capacity to interpret what's happening, coordinate decisions, and take action as complexity grows.

Putting it into practice

StackAdapt's AI-first advertising hub, Ivy Studio™, brings AI into the advertising workflow, helping marketers understand performance, uncover opportunities, and take action—all from one place.

[Learn more here →](#)



Context across the system helps

AI INTERPRET → COORDINATE → ACT



Brands versus agencies: Different coordination constraints



Brands and agencies appear to encounter marketing complexity in different places. Brands report more friction in connecting the foundations of their marketing operations, including data and technology integration and putting AI and automation into practice. They also report considerably lower confidence tying advertising investment to business results.

Agencies show a different tension: measurement confidence is substantially higher, yet performance remains heavily prioritized over brand building. Their challenge may therefore be less about establishing measurement confidence and more about using that evidence to coordinate media decisions around both immediate client performance expectations and long-term growth.

Brands may need to strengthen how data, technology, measurement, and workflows work together across the organization, while agencies may need to connect sophisticated cross-channel execution into a broader view of client results.



Where complexity shows up differently for brands and agencies

Complexity doesn't land in the same place for every marketer. For brands, the pressure shows up in the operating foundation. For agencies, it shows up in translating measurement confidence into media decisions that balance near-term performance and longer-term growth.

Where brands and agencies diverge

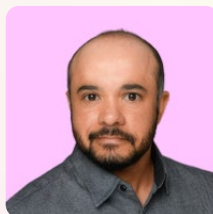
Brands Agencies



Expert commentary

“

Brands and agencies face different coordination challenges because they operate across different organizational boundaries. Brand marketers need to connect media with customer data, commerce, product, and longer-term business objectives that span multiple functions and systems. Agencies are more concentrated around media execution, which can make measurement and optimization easier to operationalize but also reinforce a focus on near-term performance. In 2027, both will need operating models that fuse brands' broader business context with agencies' media and measurement expertise.



Jacob Bourne

Analyst, Technology, EMARKETER



What happens next:

AI *raises* the value of coordination

Across the research, marketers with stronger data and measurement foundations are more likely to report that AI has improved cross-channel coordination.

Seventy-nine percent of marketers agree that AI only delivers value when the underlying data and measurement are connected and trusted.

AI is changing more than the tools marketers use. It's changing how marketing operates. As planning, execution, analysis, and optimization become more continuous, teams need systems that can connect data, interpret performance, and guide decisions across the full campaign lifecycle.

AI coordination gains are higher when the foundations are stronger

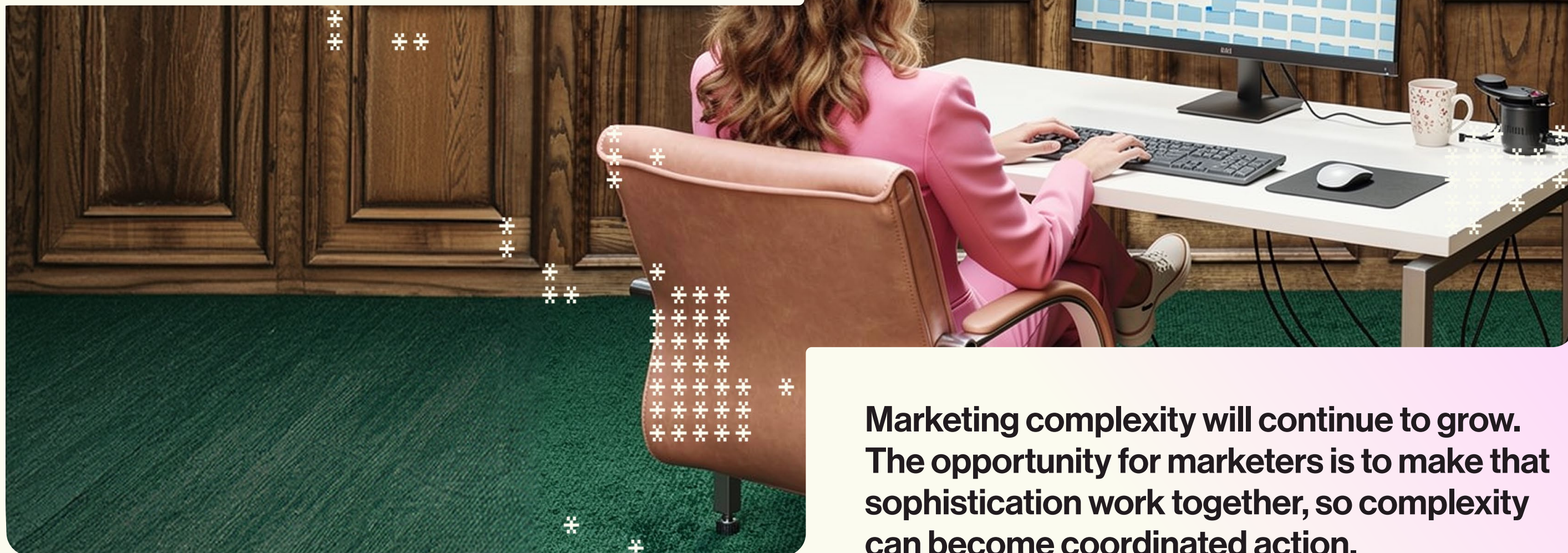
Share of marketers who say AI has improved cross-channel coordination





Teams with a unified view of customers, trusted measurement, and coordinated workflows will be better prepared to use AI to move faster and make better decisions. Teams without those foundations risk layering new capabilities onto fragmented processes that weren't built for the speed and complexity of modern advertising.

By bringing media activation, audience and customer intelligence, cross-channel execution, measurement, and AI together, StackAdapt can help advertisers coordinate increasingly sophisticated strategies without requiring marketers to manually connect every part of the process themselves.



Marketing complexity will continue to grow. The opportunity for marketers is to make that sophistication work together, so complexity can become coordinated action.



Methodology

The State of Programmatic Advertising 2027 is based on a global survey of 885 senior marketing and advertising professionals, fielded by NewtonX from July 7–31, 2026. Respondents ranged from manager-level roles through the C-suite and represented brands and agencies at organizations with 100 or more employees, including mid-sized businesses with 100–999 employees and large or enterprise organizations with 1,000 or more employees. The sample included 360 respondents in North America (United States: 240; Canada: 70; Mexico: 50), 300 in EMEA (Germany: 100; United Kingdom: 100; France: 50; Spain: 50), and 225 in APAC (Australia: 90; Japan: 50; Indonesia: 25; Malaysia: 24; Singapore: 18; Thailand: 18).

The survey was designed to support macro-level analysis of programmatic advertising priorities, practices, and challenges across markets. Findings should be interpreted as broad market indicators, not as a basis for claims about individual industries or verticals within a region.

Where this report references year-over-year benchmark comparisons, benchmark years refer to the report year. The 2026 benchmark data was collected in 2025, and the 2027 survey data was collected in 2026.

SAMPLE

885 respondents

FIELDWORK

July 7–31, 2026

RESPONDENTS

Manager to C-suite at brands and agencies, 100+ employees

PLATFORM DATA

Anonymized StackAdapt data, Aug 2025–Jul 2026



StackAdapt is the leading AI advertising and orchestration platform marketers rely on to drive brand growth and revenue. Built entirely in-house with an easy-to-use interface, StackAdapt unifies programmatic and owned channels—including CTV, DOOH, display, native, audio, email, and more—into one seamless experience. The platform makes it easy to find the right audience, personalize creative, run campaigns, optimize, and measure results in one place. Trusted by the most forward-thinking brands and agencies, StackAdapt combines speed of innovation, deep vertical expertise, and partnership that powers real business growth.

For more information, visit stackadapt.com.