



The 2026 India Media Budgets Survey

Key insights into Indian media budget decisions and market sentiment for 2026

About the study

Each year, the WFA and Ebiquity run the Annual Media Budgets Survey, offering vital insights into the priorities and media budgeting plans of leading brands across the globe.

This year, the ISA – along with 15 other country trade bodies – partnered with the WFA and Ebiquity to create Indian benchmarks that could be compared to global averages, aiding the planning and evaluation processes of marketers in India and around the world.

PARTICIPATING MARKETS



518

Total responses globally

49

Total responses from Indian marketers

\$1.93bn

Total advertising spend of Indian advertisers in survey*

* COMvergence spend data for 2025



Sunil Kataria,
Chairman, ISA
CEO – Godrej Agrovet



India's media ecosystem is entering a defining decade, one where growth will be shaped by intelligence driving investment spends. The survey reflects a market that is not merely spending more, but thinking sharper : rebalancing brand and performance, pivoting towards Total TV, pushing for outcome-based returns on spends and demanding transparency in AI-enabled decisioning. For the ISA, this moment reinforces a simple truth that sustainable competitive advantage will belong to marketers who unite creativity, measurement rigour, and responsible adoption of emerging technologies



The report underscores the dynamism of Indian marketers, with budget growth and investment in emerging channels like Addressable TV outpacing global averages. The findings reveal a critical need to evaluate how AI enablement is evolving agency practices and pricing so that it can drive efficiency while ensuring transparency and sustainable partnerships.



Sandeep Srivastava,
MD - India
ebiquity



Stephan Loerke,
CEO



With the geopolitical and economic pressures of the last 12 months continuing into 2026, we can be encouraged by the cautious confidence shown in expectations of greater budgets and in the value of brand building. The results show an industry energised for change, not paralysed by it.

India findings at a glance



Confidence in media budget growth, outpacing global average



Increase in focus on performance objectives, despite global trends



Addressable TV to dominate growth as Linear TV declines



Strong desire for media and creative to integrate deeper



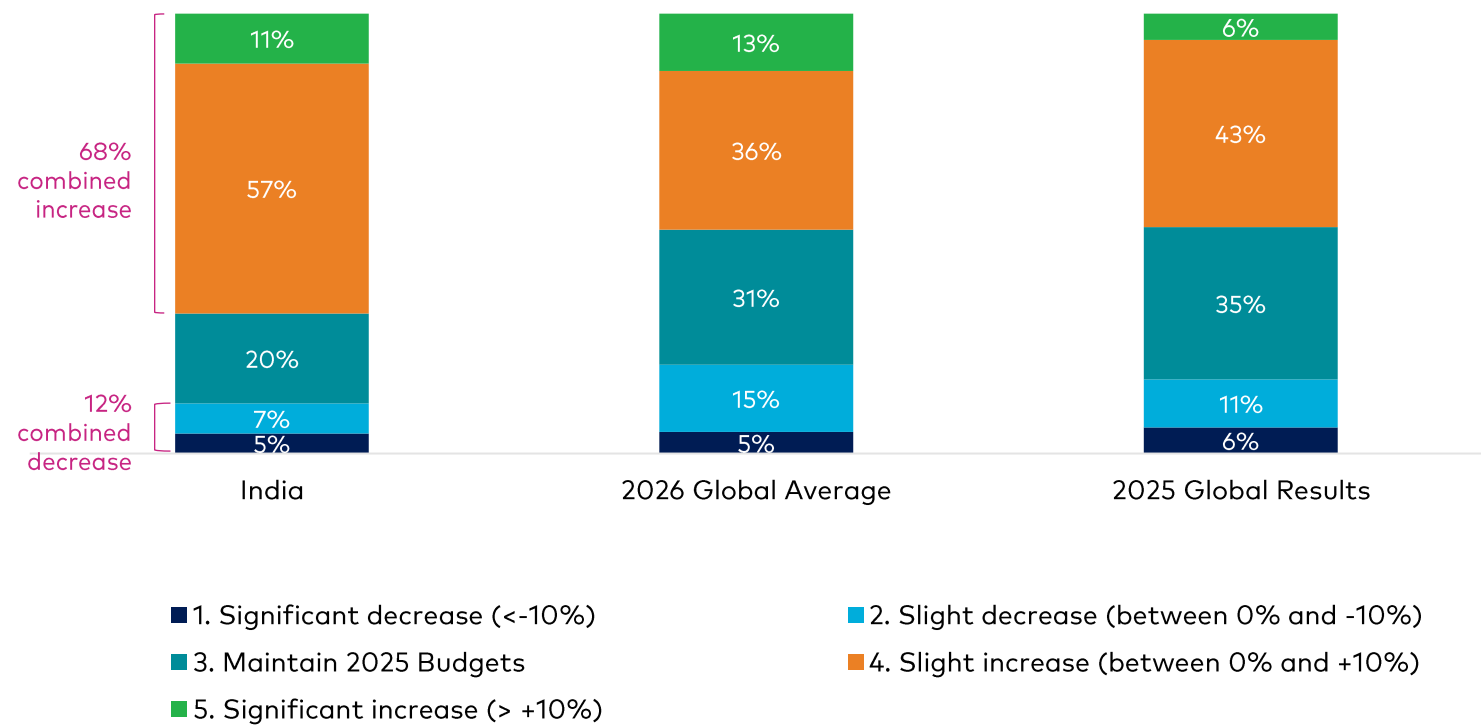
Outcome-based pricing models are increasingly prominent



Brands are active, but uncertain, on AI

68% of Indian marketers plan budget growth despite economic challenges, outpacing global average

Q. Estimate your media budget evolution for the entire country for 2026 vs 2025



GLOBAL RESPONDENTS' COMMENTS TEMPER CONFIDENCE IN INCREASED INVESTMENT



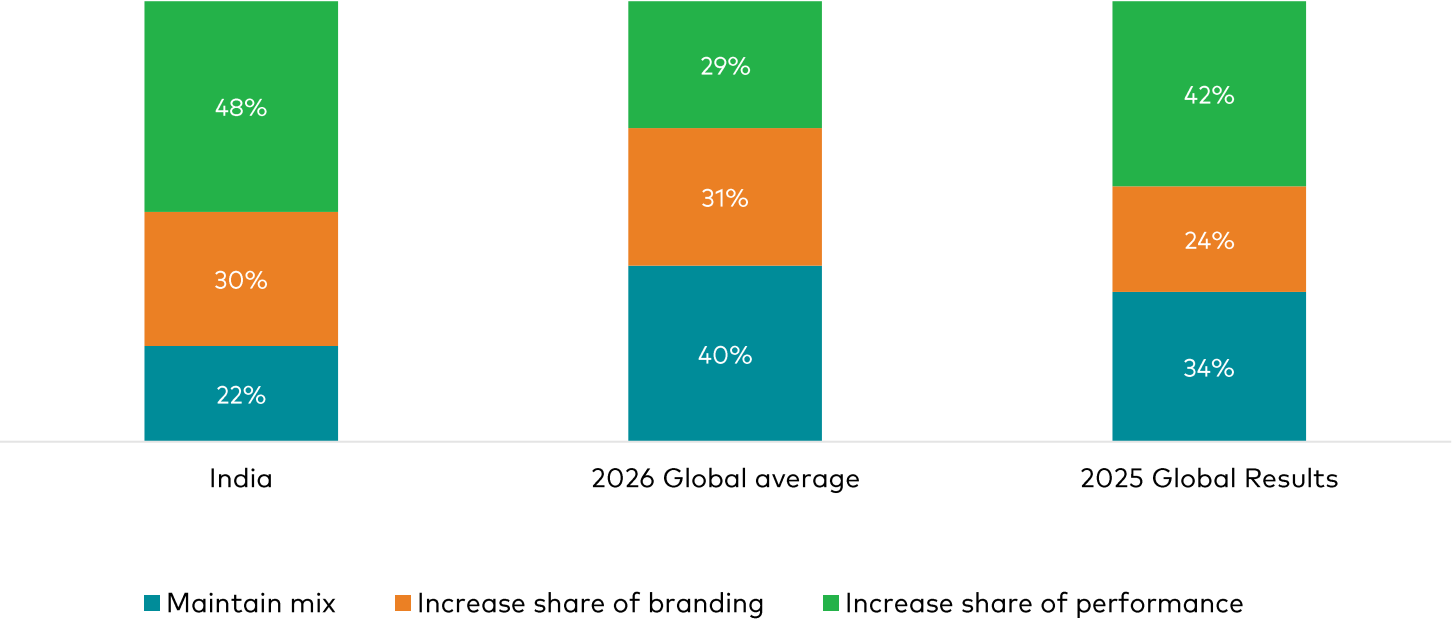
"Need to invest ahead of inflation"

"...Cost optimisation due to the declining economy"



48% of Indian marketers to increase performance activity, despite the global shift back to brand

Q. To what extent do you expect a shift in your global mix of performance vs branding activity (2026 vs 2025)?



GLOBAL RESPONDENTS SUGGEST A NEED TO BALANCE BUDGETS



"Budgets will increasingly support a balanced mix"



"Currently unbalanced"



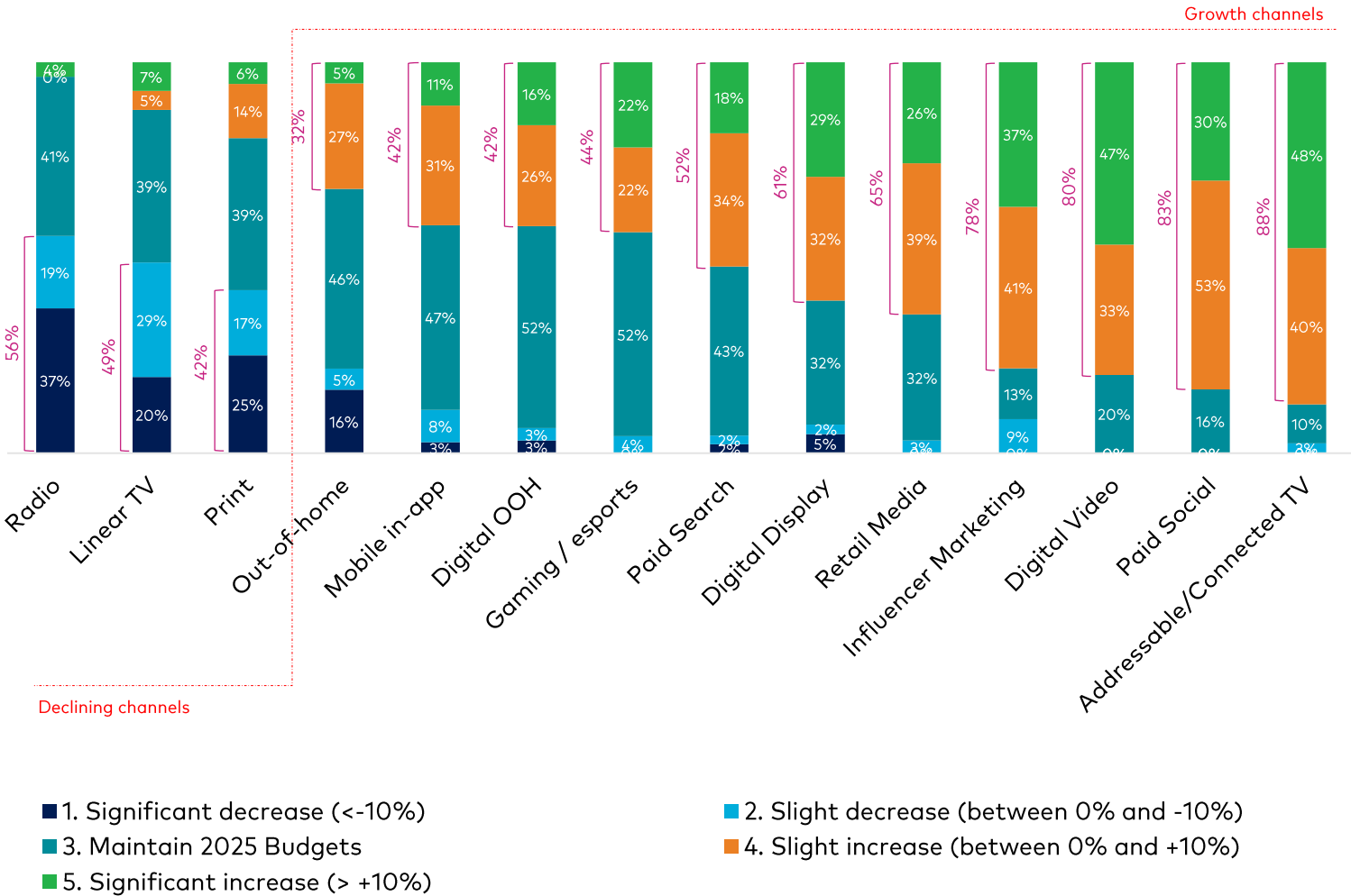
"Keep to 60/40 principles"

88% of Indian marketers to increase Addressable TV spend, with Linear TV and Radio to decline

Market Comparison

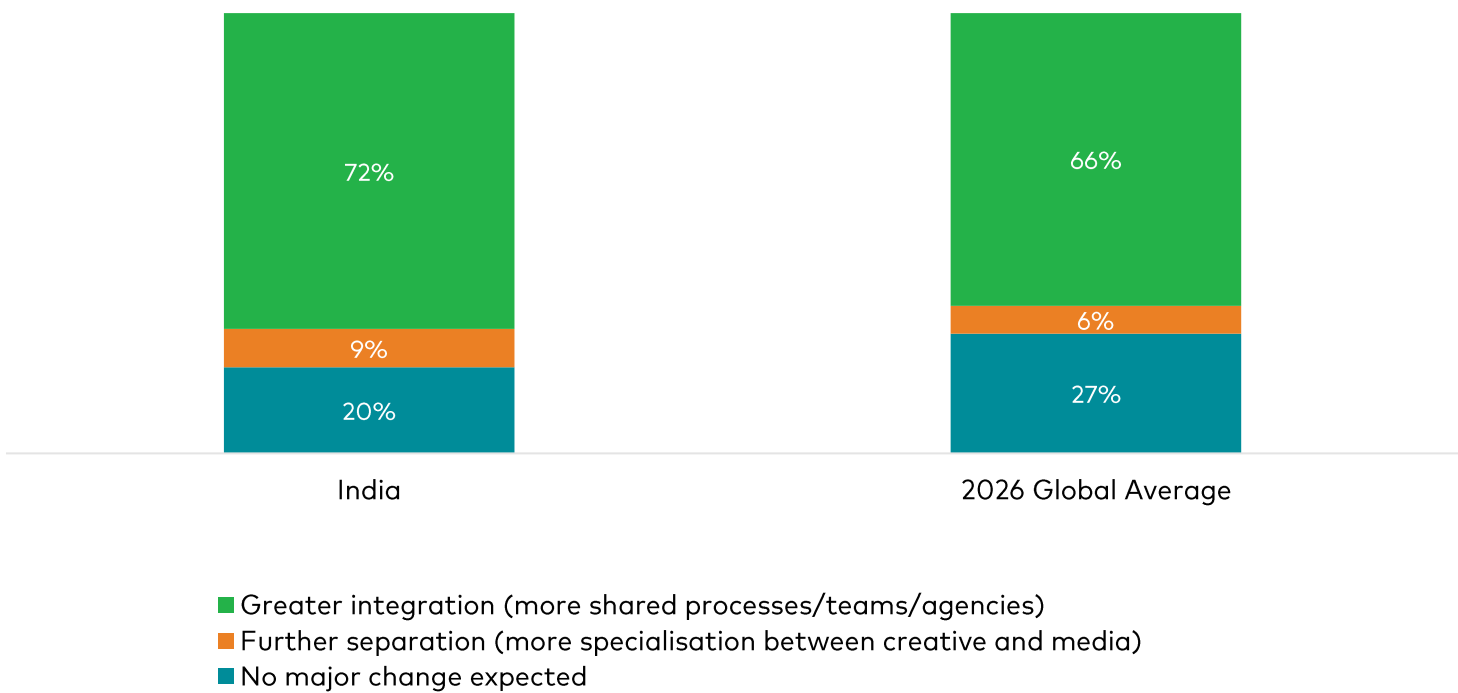
Only marketers in the GCC expect to increase Addressable TV and Influencer Marketing spend more than marketers in India (global average: 68% and 59% respectively).

Q. Please provide your best estimate of your media budget evolution by channel for 2026 vs 2025.



72% of Indian marketers to drive deeper integration between media and creative for greater agility and real-time relevance

Q. How do you expect your relationship between creative and media to evolve in 2026?



Ankit Desai, India & Global Centre of Excellence, Marico)

ISA Media Forum Chairperson

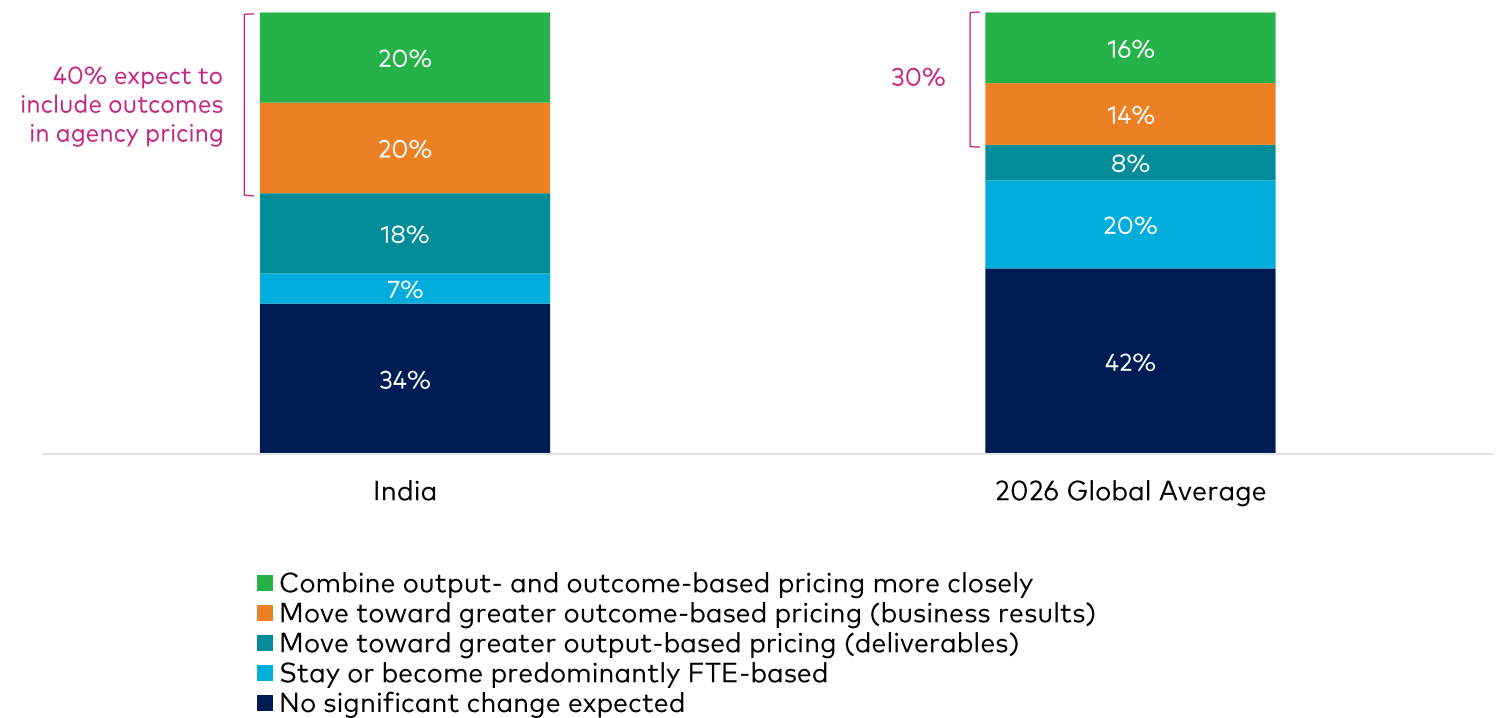


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The momentum is shifting toward more connected ways of working. As media and creative align more seamlessly, we are likely to unlock stronger design of experiences, more precise use of data, and a far more potent expression of brand purpose”

40% of Indian marketers to increase use of outcomes in agency pricing models, as FTE-models lose significance

Q. How do you expect your media agency remuneration model to evolve in 2026 and beyond?



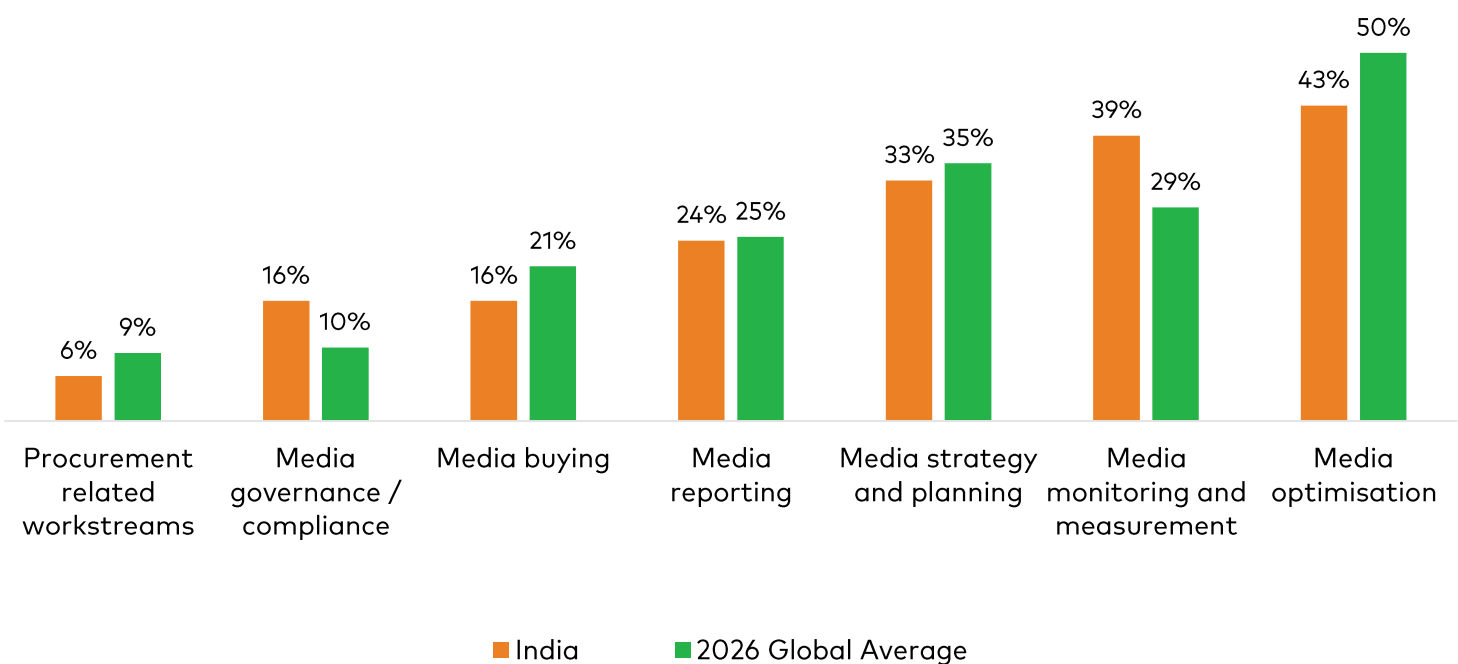
Sandeep Srivastava,
MD - India
[ebiquity](#)

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The shift toward outcome-based pricing marks a pivotal moment for agency-client relationships. Advertisers must focus on defining clear metrics and aligning incentives to ensure results-driven partnerships that can adapt to evolving, tech-led workflows.

AI adoption is widespread among brands, with 43% of Indian marketers employing it for media optimisation

Q. Which of the following purposes is your organisation or your partners currently using generative or agentic AI for?



GLOBAL RESPONDENTS HIGHLIGHT CONCERNS ABOUT TRANSPARENCY IN AI USAGE



"Not sure where partner agencies use AI"



"Primarily done by media agency, no full transparency"



"I am unsure of what our media agency currently uses."

Key priorities for Indian marketers in 2026



Align budget growth with inflation and ROI expectations



Evaluate potential impact of depressed brand activity on long-term growth



Optimise 'Total TV' for maximum effectiveness



Build creative-media workflows for agility and relevance



Define metrics for outcome-based agency pricing discussions



Leverage AI strategically, demand transparency from agency partners



DRIVING EFFECTIVENESS AND EFFICIENCY

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Established Legacy: The only body representing advertisers in India for 70+ years

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- BARC (Broadcast Audience Research Council)
- WFA (World Federation of Advertisers), based in Brussels

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We help more than 75 of the world's top 100 brands deliver Effective and Responsible Advertising.

Ebiquity is the world leader in media investment analysis. Trusted by more than 75 of the top 100 global advertisers – and 500 more worldwide – we analyse over **\$100 billion in media spend each year**. This unmatched scale gives us the deepest data and the sharpest insights in the industry, powering the impartial advice our clients act on to make the right decisions that deliver Effective and Responsible Advertising.

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With our evidence-based consultancy, clients transform their media operations, strengthen governance of their investments, and unlock significant incremental business growth.

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About the World Federation of Advertisers

The World Federation of Advertisers (WFA) is the voice of marketers worldwide, representing 90% of global marketing communications spend – roughly US\$900 billion per annum through a unique, global network of the world's biggest markets and biggest marketers. WFA champions responsible and effective marketing communications worldwide.

Find out more at: wfanet.org

