



Media i™

Industry Survey

May 2026

HIGHLIGHTS



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INTRODUCTION

The following presentation reports on Media i's latest instalment of its Industry Mood & Sentiment Survey. With over 4,500 respondents, the Media i Survey remains without doubt the largest and most significant industry sentiment survey for the media industry.

The surveys are aimed at helping to positively address the widening gap between media agencies and media owners. This is achieved through collating attitudes and opinions on issues that are affecting the industry and tracking over time the sentiments and performance of agencies, media channels and media owner sales representation.

As such, this survey is split into two tranches, one aimed at media sales professional's, the other at media agency practitioners. This report outlines the outcomes of each tranche.

Through this process Media i hopes to create more meaningful discussions with its clients, agency partners and industry observers



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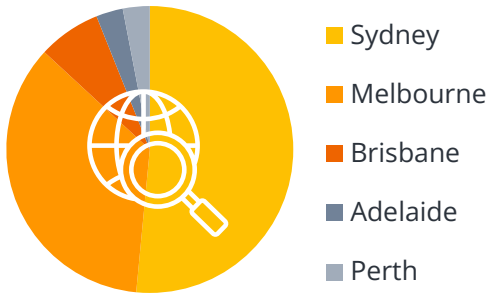
SURVEY COMPOSITION



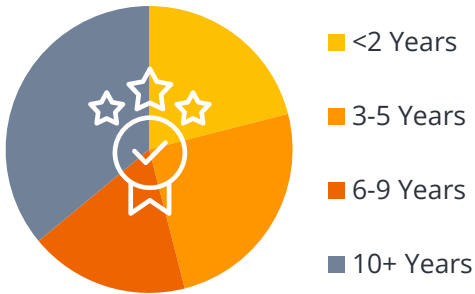
Media Agency Composition

2,690 media agency professionals participated in the Media i May-26 survey. Being **75-80% of the media owner facing agency market** the survey composition is representative of the industry across all filters.

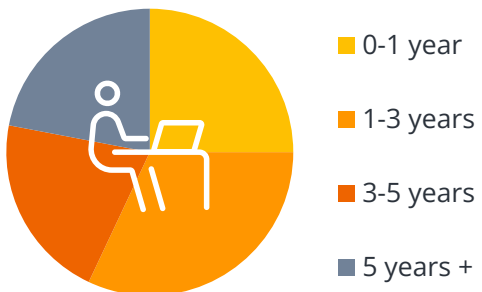
By Market



By Experience



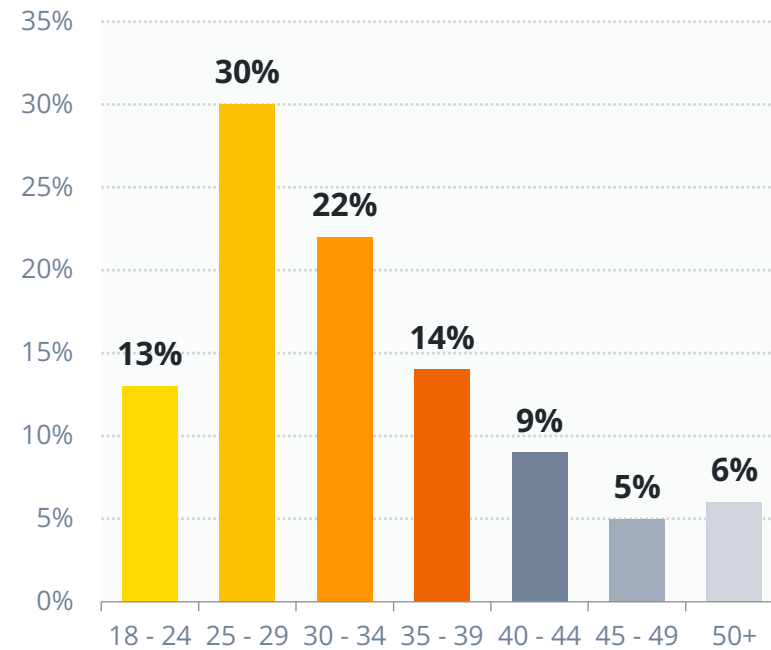
By Tenure



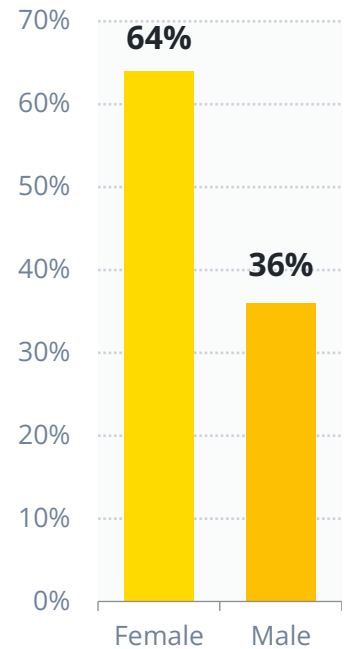
By Position



By Age



By Gender

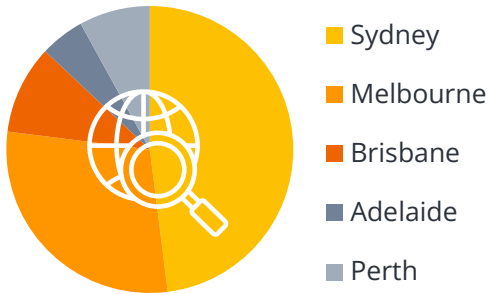


2,690n Media Agency completes May 2026

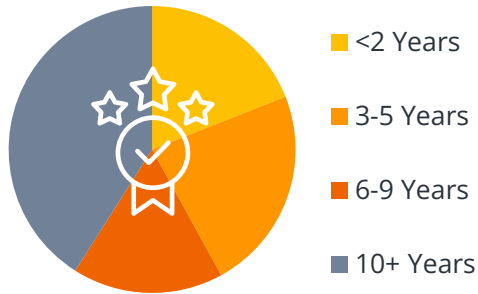
Media Owner Composition

1,994 media owner sales professionals participated in the Media i May-26 Survey representing 75-80% of the media agency facing sales roles.

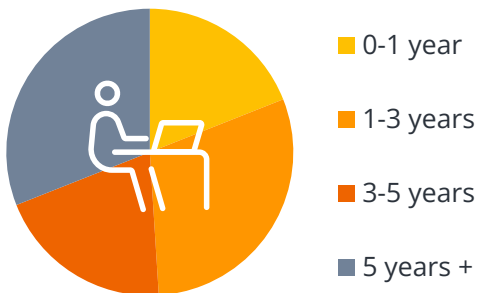
By Market



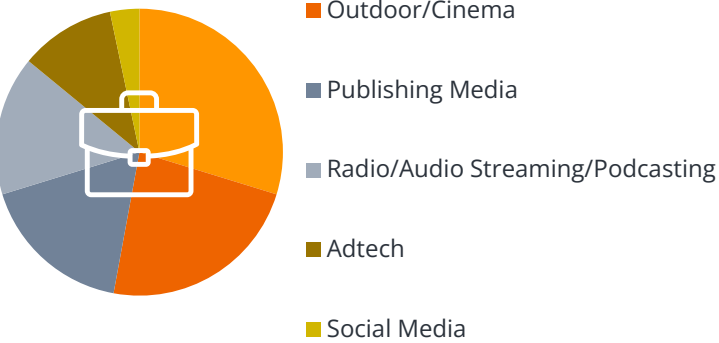
By Experience



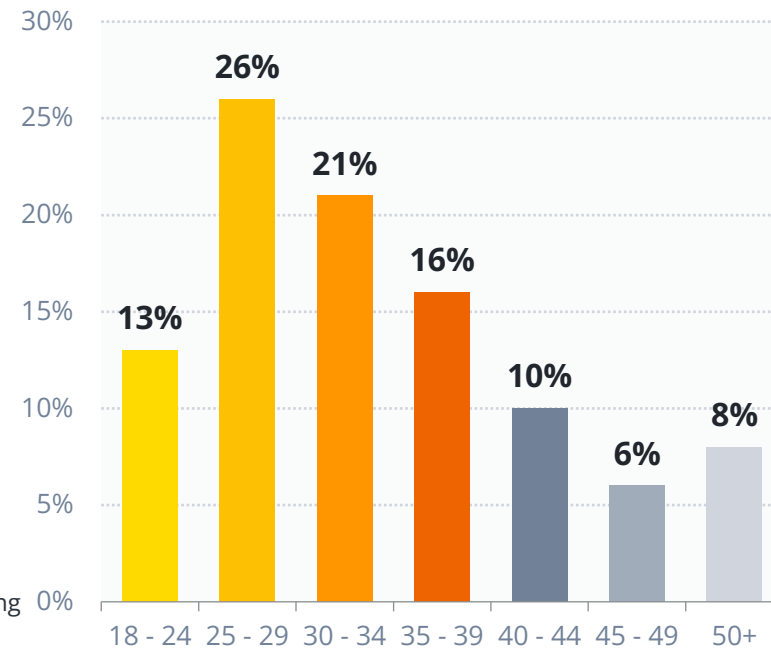
By Tenure



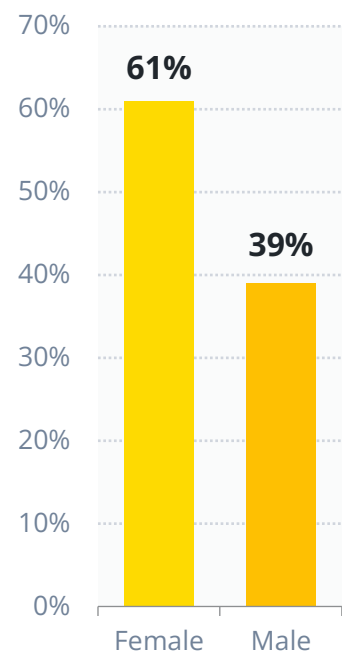
By Channel



By Age



By Gender



1,994n Media Owner completes May 2026



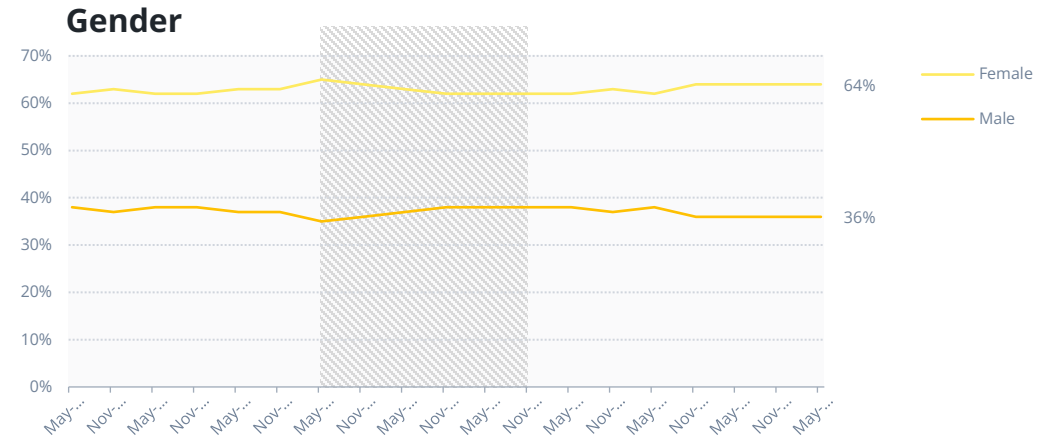
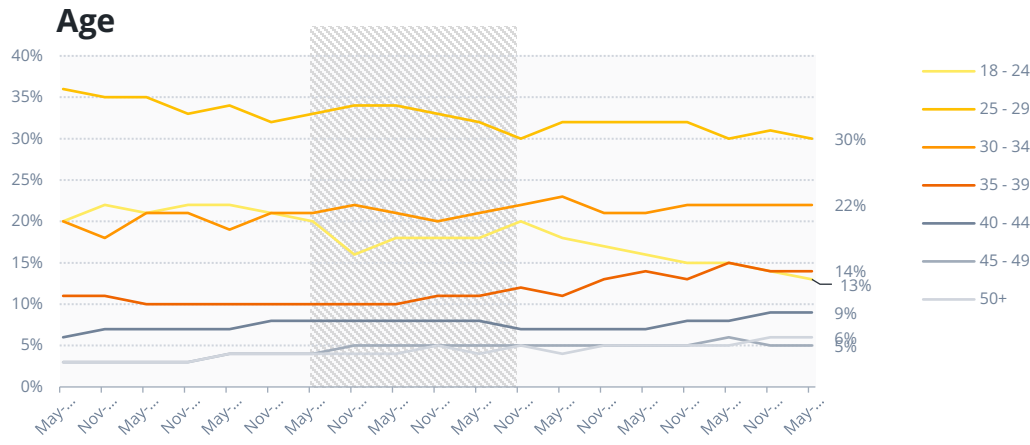
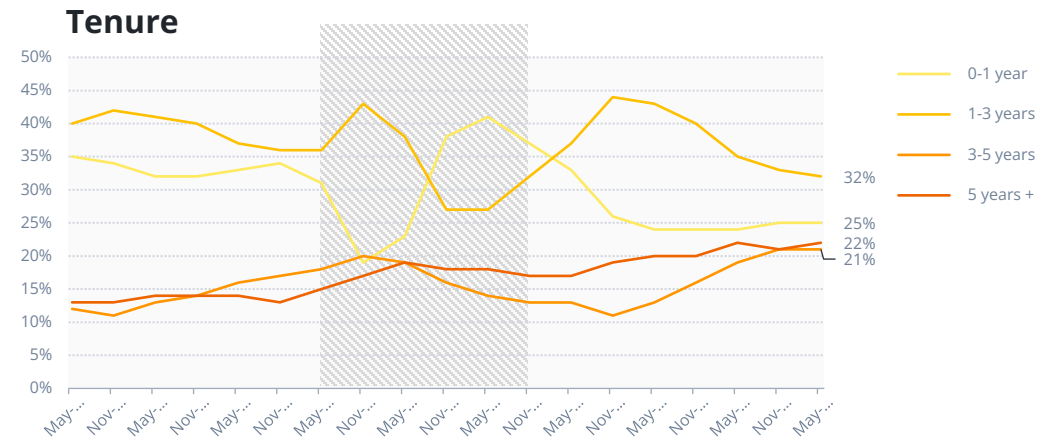
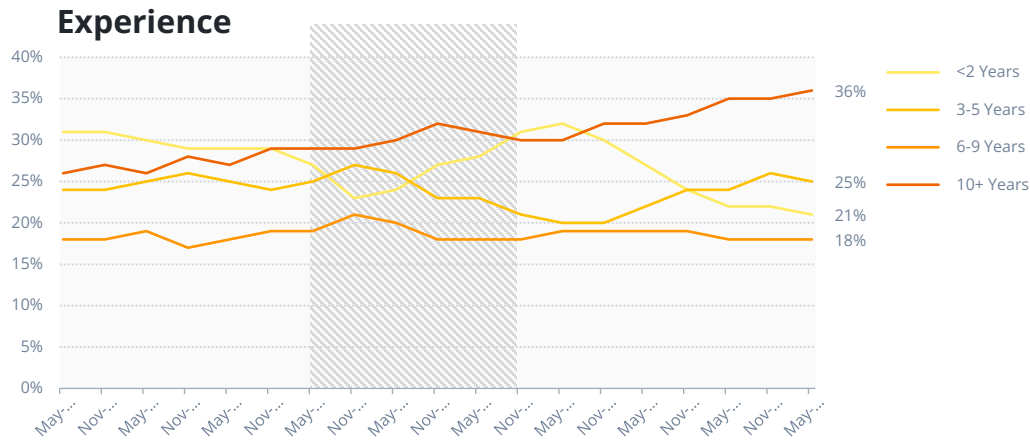
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COMPOSITION TRENDS



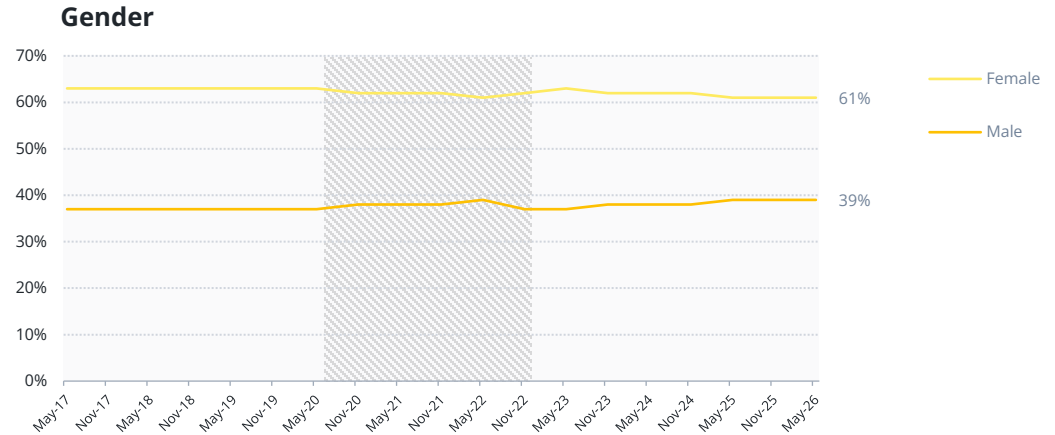
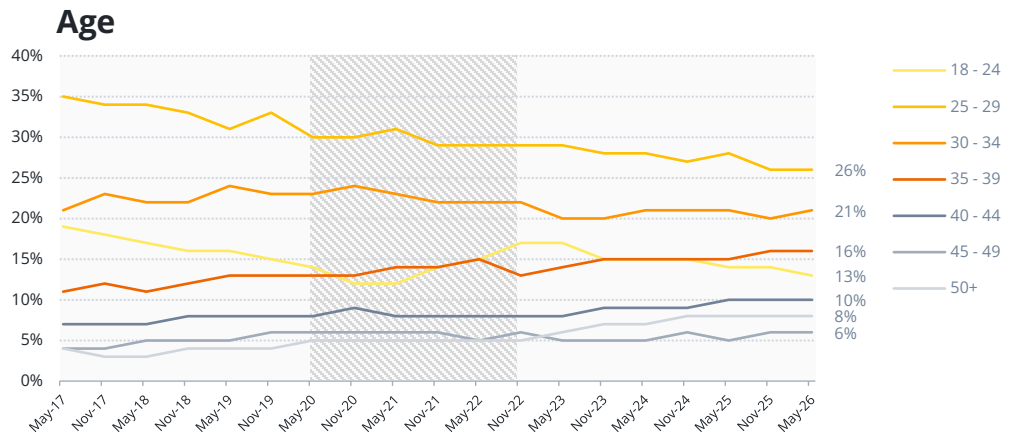
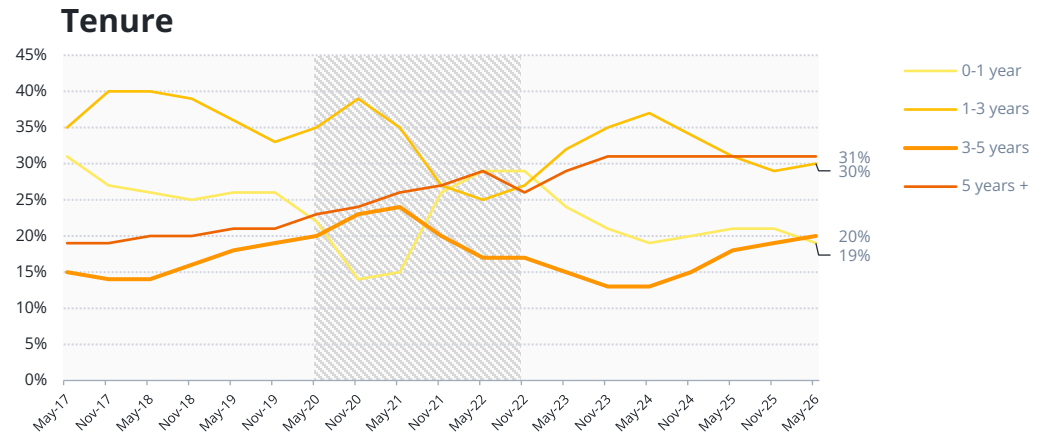
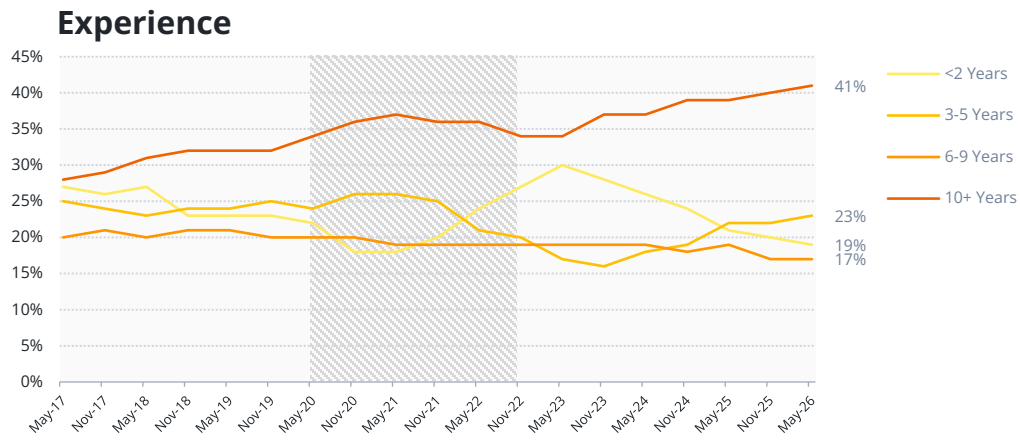
Media Agency Composition - Time Series

The media agency industry profile continues to skew toward more experienced professionals, with the proportion of respondents having 10+ years' experience rising steadily to 36%, while those with less than five years' experience [in particular 0-2yrs] has gradually declined.



Media Owner Composition - Time Series

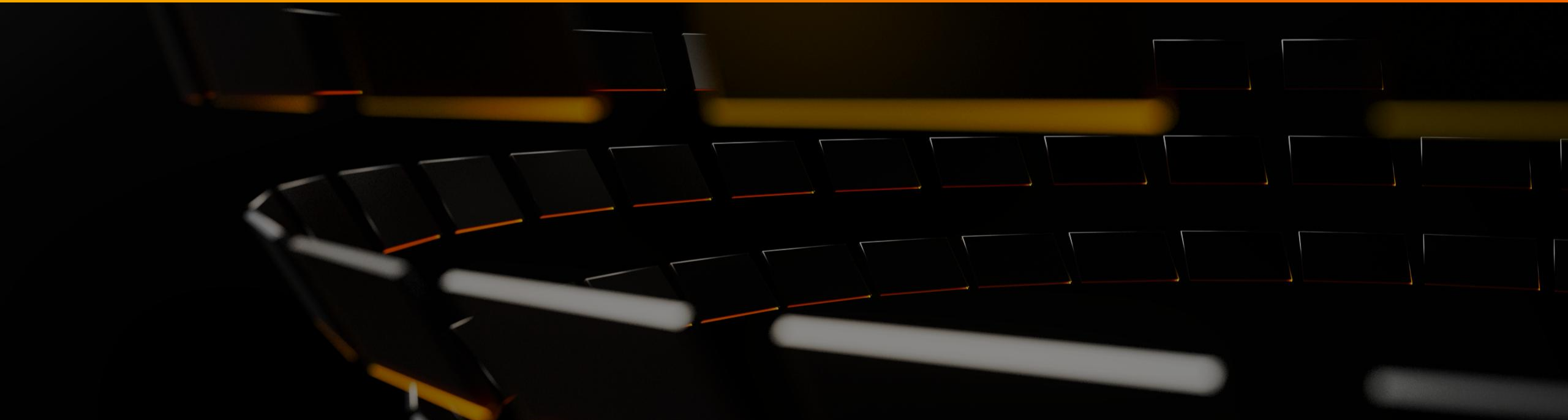
The media agency industry profile continues to skew toward more experienced professionals, with the proportion of respondents having 10+ years' experience rising steadily to 41%, while those with less than five years' experience have gradually declined.





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MAY 26 SURVEY HIGHLIGHTS



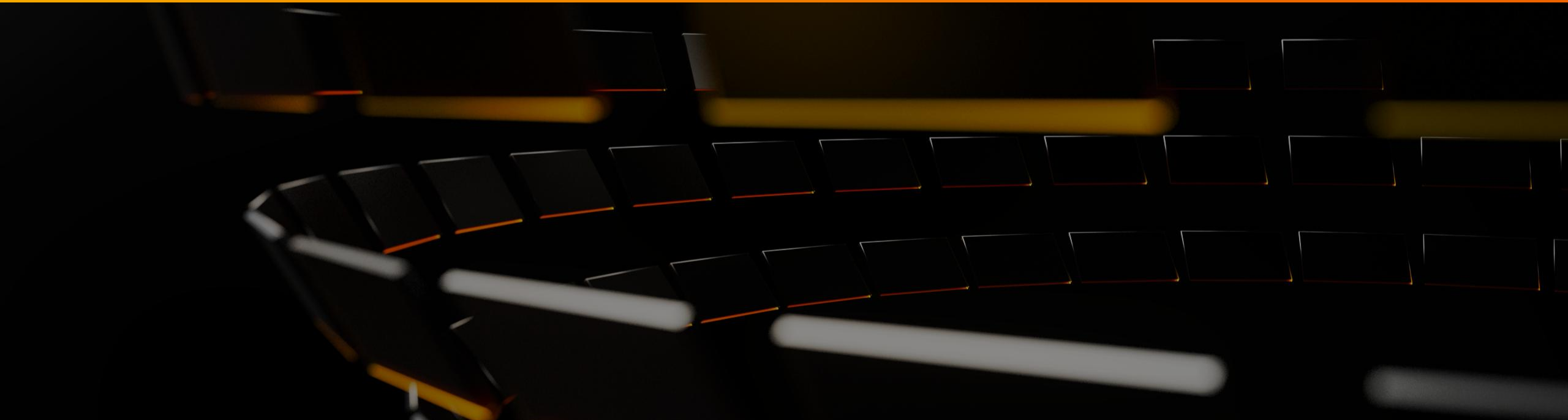
Industry sentiment remains positive and stable, driven by strong inclusion, engagement and growing confidence in AI, but ongoing retention risk and weaker perceptions of career growth and talent development continue to be key challenges.





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INDUSTRY STATEMENTS



Media Agency Statements



AUSTRALIAN MEDIA INDUSTRY STATEMENTS	May-26
Total	2,690
I Am Adequately Resourced to Perform My Job	72%
I Will Be Actively Looking For A Job In The Next 6 Months	34%
My Agency Recognises & Rewards My Efforts	74%
My Agency Has Clear Values Which Are Communicated & Respected By Staff	88%
Management Clearly & Effectively Communicate To Staff	78%
I Feel An Important Member Of My Team & The Organisation	87%
I Understand What My Agency Stands For	88%
I Feel I Have The Opportunity For Growth Within My Agency	74%
My Agency Is Committed To Developing Its People/Talent	82%
Management Effectively Balance Their Interest In Staff & Bottom Line Results	75%
I See A Career Path For Myself Within The Media Agency Industry	78%
I've Had A Career Conversation In The Last 12 Months	81%
My Manager Asks For My Opinion/Input On Projects	91%
My agency is committed to diversity, equity and inclusion	94%
My agency is delivering advanced & effective use of AI that is producing meaningful performance &/or efficiency gains	79%

Despite ongoing headwinds, industry sentiment remains broadly positive with an engaged media agency workforce - strongest scores in diversity and inclusion (94%), employee input (91%), and organisational clarity (88%).

Employees also recognise meaningful AI adoption, with 79% believing agencies are delivering effective AI-driven performance and efficiency gains [the first time this statement has been included].

Retention risk remains elevated, with 34% planning to look for a new role within six months. Softer results across growth opportunities, career pathways, and talent development suggest agencies need stronger focus on progression and long-term employee engagement.

Media Agency Statements - Year On Year



AUSTRALIAN MEDIA INDUSTRY STATEMENTS	Rolling Ave [10yr]	Nov-23	May-24	Nov-24	May-25	Nov-25	May-26
Total	2,339	2,640	2,652	2,641	2,524	2,671	2,690
I Am Adequately Resourced to Perform My Job	71%	73%	75%	73%	74%	68%	72%
I Will Be Actively Looking For A Job In The Next 6 Months	28%	25%	27%	32%	35%	33%	34%
My Agency Recognises & Rewards My Efforts	75%	75%	77%	75%	76%	73%	74%
My Agency Has Clear Values Which Are Communicated & Respected By Staff	89%	-	90%	-	88%	-	88%
Management Clearly & Effectively Communicate To Staff	79%	-	78%	-	75%	-	78%
I Feel An Important Member Of My Team & The Organisation	87%	-	87%	-	87%	-	87%
I Understand What My Agency Stands For	90%	-	90%	-	89%	-	88%
I Feel I Have The Opportunity For Growth Within My Agency	79%	-	79%	-	77%	-	74%
My Agency Is Committed To Developing Its People/Talent	86%	-	86%	-	83%	-	82%
Management Effectively Balance Their Interest In Staff & Bottom Line Results	70%	-	77%	-	75%	-	75%
I See A Career Path For Myself Within The Media Agency Industry	82%	-	81%	-	80%	-	78%
I've Had A Career Conversation In The Last 12 Months	85%	-	87%	-	85%	-	81%
My Manager Asks For My Opinion/Input On Projects	92%	-	92%	-	91%	-	91%
My agency is committed to diversity, equity and inclusion	95%	-	95%	-	95%	-	94%
My agency is delivering advanced & effective use of AI that is producing meaningful performance &/or efficiency gains	79%	-	-	-	-	-	79%

Media Owner Statements



AUSTRALIAN MEDIA INDUSTRY STATEMENTS	May-26
Total	1,994
I Am Adequately Resourced to Perform My Job	76%
I Will Be Actively Looking For A Job In The Next 6 Months	30%
My Organisation Recognises & Rewards My Efforts	75%
Management Clearly & Effectively Communicate To Staff	76%
I Feel An Important Member Of My Team & The Organisation	84%
I Feel I Have The Opportunity For Growth Within My Organisation	69%
My Company Is Committed To Developing Its People/Talent	77%
Management Effectively Balance Their Interest In Staff & Bottom Line Results	73%
My organisation is committed to diversity, equity and inclusion	90%
I've had a career conversation in the last 12 months	80%
My company is delivering advanced and effective use of AI that is producing meaningful performance and/or efficiency gains	66%

Media owner sentiment remains broadly stable in May-26, with strongest results in inclusion, team belonging, and career conversations.

Softer scores around growth opportunities, talent development, and a rising intent to leave continue to highlight ongoing retention and progression challenges and reflect a challenging media market/economic backdrop.

Media Owner Statements – Year On Year

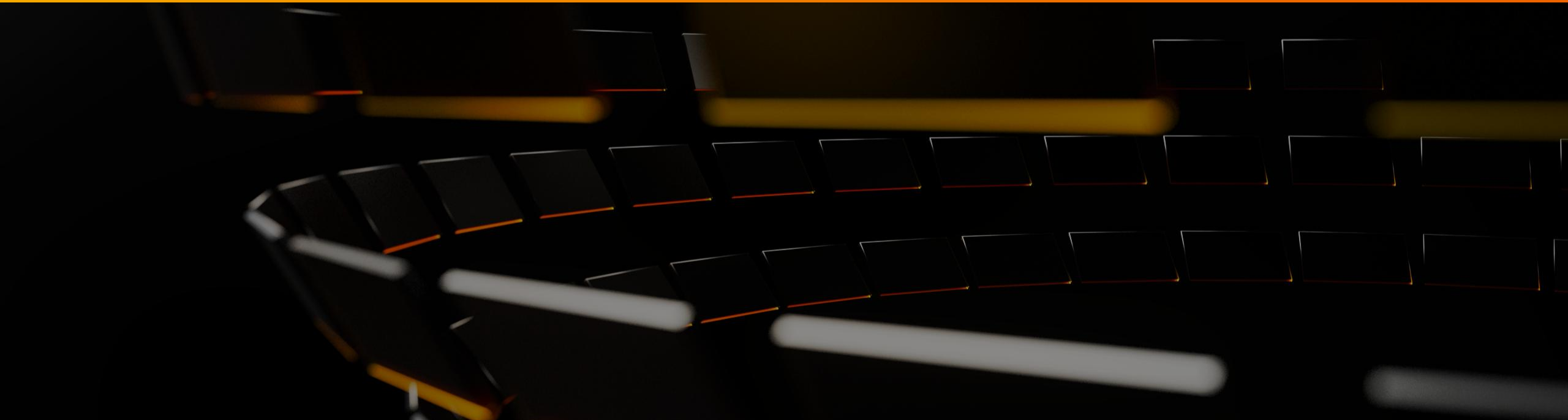


AUSTRALIAN MEDIA INDUSTRY STATEMENTS	Rolling Ave [10yr]	Nov-23	May-24	Nov-24	May-25	Nov-25	May-26
Total	2,026	2,223	2,088	2,155	2,154	2,003	1,994
I Am Adequately Resourced to Perform My Job	78%	78%	77%	76%	77%	74%	76%
I Will Be Actively Looking For A Job In The Next 6 Months	26%	25%	31%	27%	30%	29%	30%
My Organisation Recognises & Rewards My Efforts	76%	74%	74%	74%	75%	73%	75%
Management Clearly & Effectively Communicate To Staff	76%	-	76%	-	74%	-	76%
I Feel An Important Member Of My Team & The Organisation	86%	-	85%	-	84%	-	84%
I Feel I Have The Opportunity For Growth Within My Organisation	72%	-	71%	-	69%	-	69%
My Company Is Committed To Developing Its People/Talent	80%	-	81%	-	77%	-	77%
Management Effectively Balance Their Interest In Staff & Bottom Line Results	75%	-	70%	-	72%	-	73%
My organisation is committed to diversity, equity and inclusion	91%	-	91%	-	90%	-	90%
I've had a career conversation in the last 12 months	79%	-	80%	-	77%	-	80%
My company is delivering advanced and effective use of AI that is producing meaningful performance and/or efficiency gains	66%	-	-	-	-	-	66%



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INDUSTRY HAPPINESS



Workplace happiness remains broadly stable, tracking close to long-term averages despite a gradual softening from post-pandemic highs

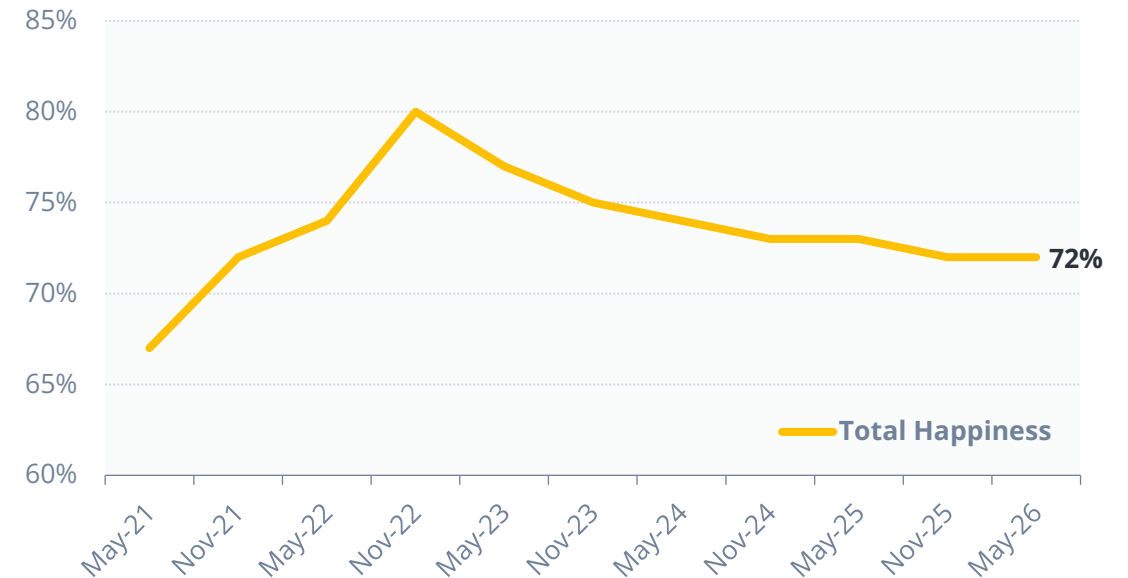


Media Agency Happiness - National



Overall workplace happiness remains relatively stable at 72% in May-26, broadly in line with the 10-year average, although levels have gradually softened since the post-pandemic peak recorded in late 2022. This remains consistent with industry sentiment.

Level of Happiness At Work	Rolling Ave [10yr]	May-26
Total	2,339	2,690
NETT: Very Happy (9/10)	24%	25%
NETT: Happy (7/8)	49%	47%
NETT: Unhappy (1/6)	27%	28%
NETT: Total Happy (7/10)	73%	72%

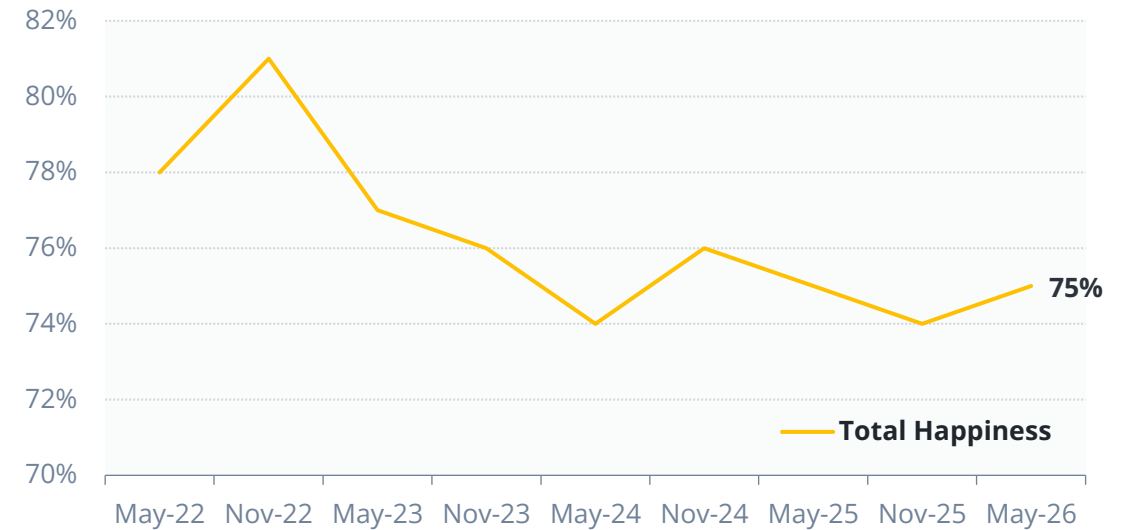


Media Owner Happiness - National



Overall workplace happiness shows a slight uptick in May-26 and remains broadly in line with the 10-year average, although levels have gradually softened since the post-pandemic peak recorded in late 2022.

Level of Happiness At Work	Rolling Ave [10yr]	May-26
Total	2,026	1,994
NETT: Very Happy (9/10)	28%	29%
NETT: Happy (7/8)	47%	46%
NETT: Unhappy (1/6)	25%	25%
NETT: Total Happy (7/10)	75%	75%





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MEDIA INDUSTRY

EMPLOYEE NPS



Employer advocacy remains strong with both sectors showing stable recommendation levels but a gradual decline in line with happiness levels



Employee Net Promoter Score - YOY



Employee NPS for the agency market presents a backward movement survey on survey, returning an NPS of +14. This trending is consistent with sentiment tracking. Respondents were asked "How likely are you to recommend your organisation as an employer to friends and colleagues?".

Level of Happiness At Work	May-23	May-24	May-25	May-26
Total	2,850	2,652	2,524	2,690
NETT: Very Likely (9/10)	45%	41%	40%	38%
NETT: Likely (7/8)	39%	37%	37%	39%
NETT: Unlikely (1/6)	16%	21%	23%	23%
NPS:	29	20	17	14

Employee Net Promoter Score - YOY



eNPS for media owners remains steady survey on survey. Respondents were asked “How likely are you to recommend your organisation as an employer to friends and colleagues?”

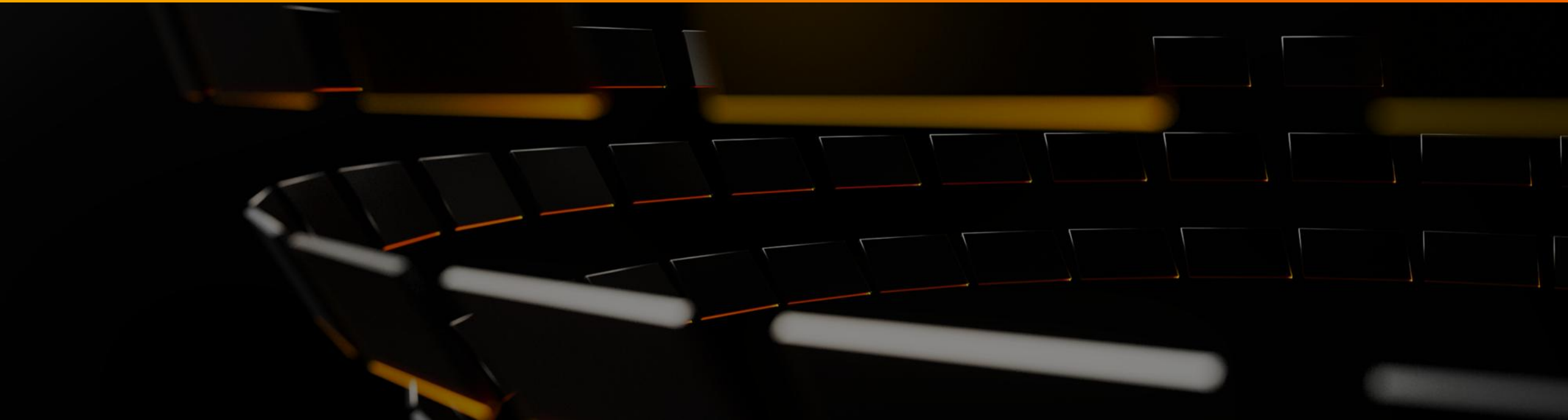
Workplace Recommendation	May-23	May-24	May-25	May-26
Total	2,224	2,088	2,153	1,994
NETT: Very Likely To Recommend (9/10)	44%	38%	39%	39%
NETT: Likely To Recommend (7/8)	35%	39%	37%	38%
NETT: Unlikely To Recommend (1/6)	21%	23%	24%	24%
NPS	23	16	15	15



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MEDIA INDUSTRY GROWTH

NATIONAL



Growth expectations for CY26 have softened from initial expectations in Oct-25

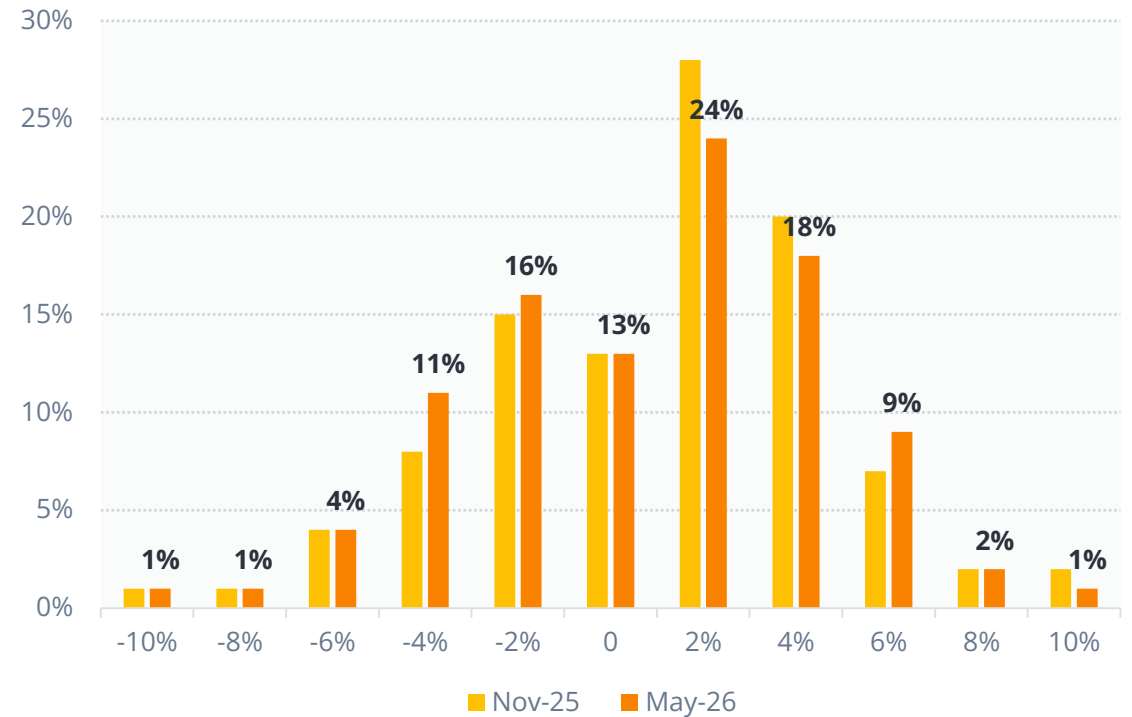


Media Industry Growth - Agency



Growth expectations have softened since Oct-25 with 54% of agency respondents now believing that the total media market [excluding search] will grow in 2026 - down from 59% heading into CY26.

Media Industry Growth	May-26
Total	2,690
CY26 Weighted Average	0.81%
- 10%	1%
- 8%	1%
- 6%	4%
- 4%	11%
- 2%	16%
0	13%
2%	24%
4%	18%
6%	9%
8%	2%
10%	1%



Q: Please indicate the extent to which the total media market advertising spend [excluding search] will grow or contract in 2026



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MOST IMPORTANT FACTORS

FOR MEDIA OWNERS WHEN DEALING WITH MEDIA AGENCIES



Responsiveness remains the defining factor in agency relationships whilst transparency has rebounded highlighting continued demand for stronger communication, collaboration, and commercial clarity from agency partners.

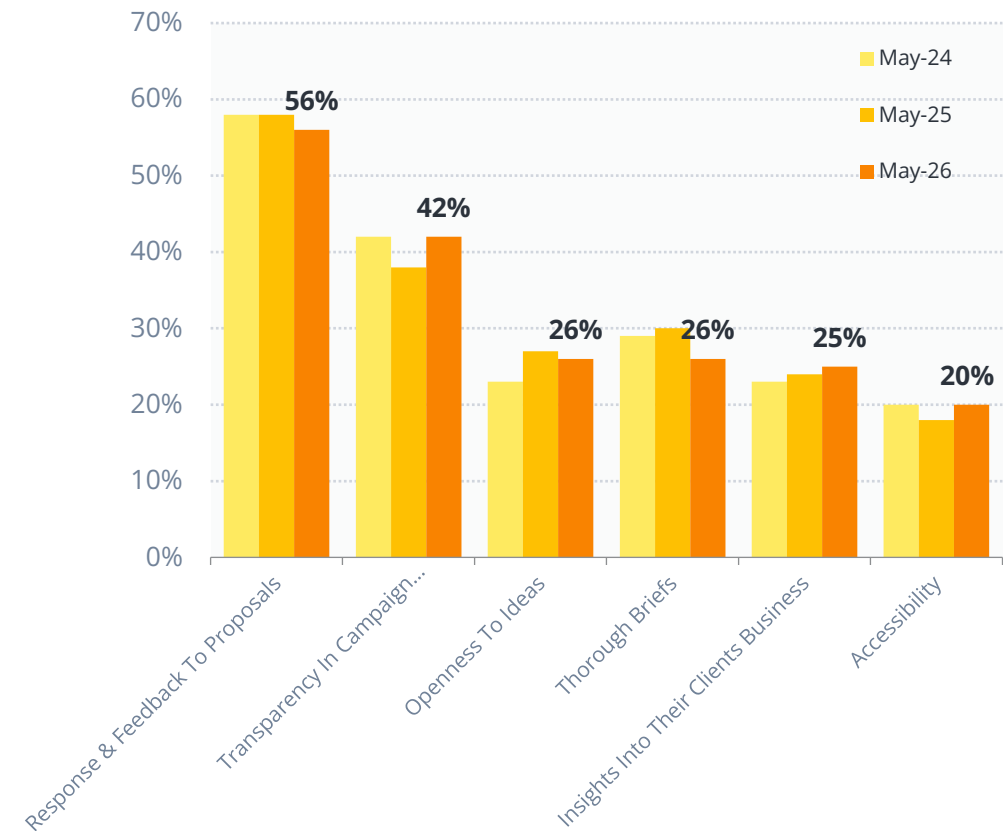


Most Important Factors - Year on Year



'Response and feedback to proposals' remains the industry's most important factor (56%), while 'transparency in campaign negotiations' has rebounded to 42%, highlighting continued demand for stronger communication, collaboration, and commercial clarity from agency partners.

Most Important Factors When Dealing with Media Agencies	May-23	May-24	May-25	May-26
Response & Feedback To Proposals	56%	58%	58%	56%
Transparency In Campaign Negotiations	44%	42%	38%	42%
Openness to Ideas/Innovation	25%	23%	27%	26%
Thorough Briefs	26%	29%	30%	26%
Insights Into Their Clients Business	22%	23%	24%	25%
Accessibility	21%	20%	18%	20%

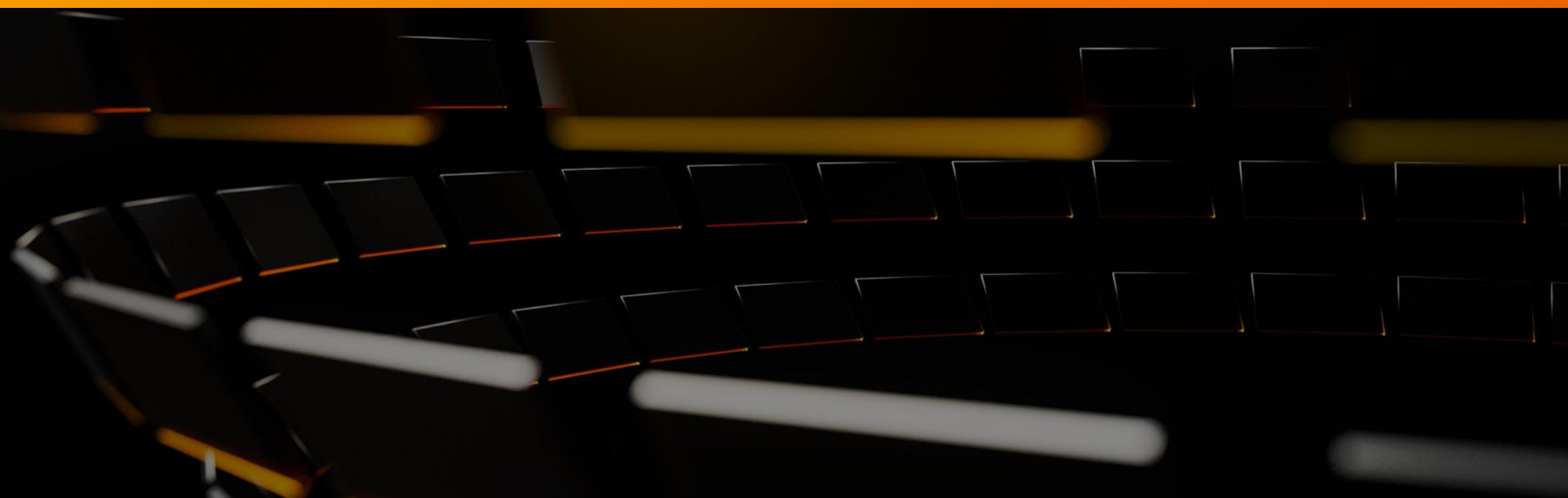




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MOST IMPORTANT FACTORS

FOR MEDIA AGENCIES WHEN DEALING WITH MEDIA OWNERS



'Understanding the client and category' alongside 'campaign delivery' remain overarching priorities, whilst 'price/value equation' remains the leading priority when evaluating response to briefs

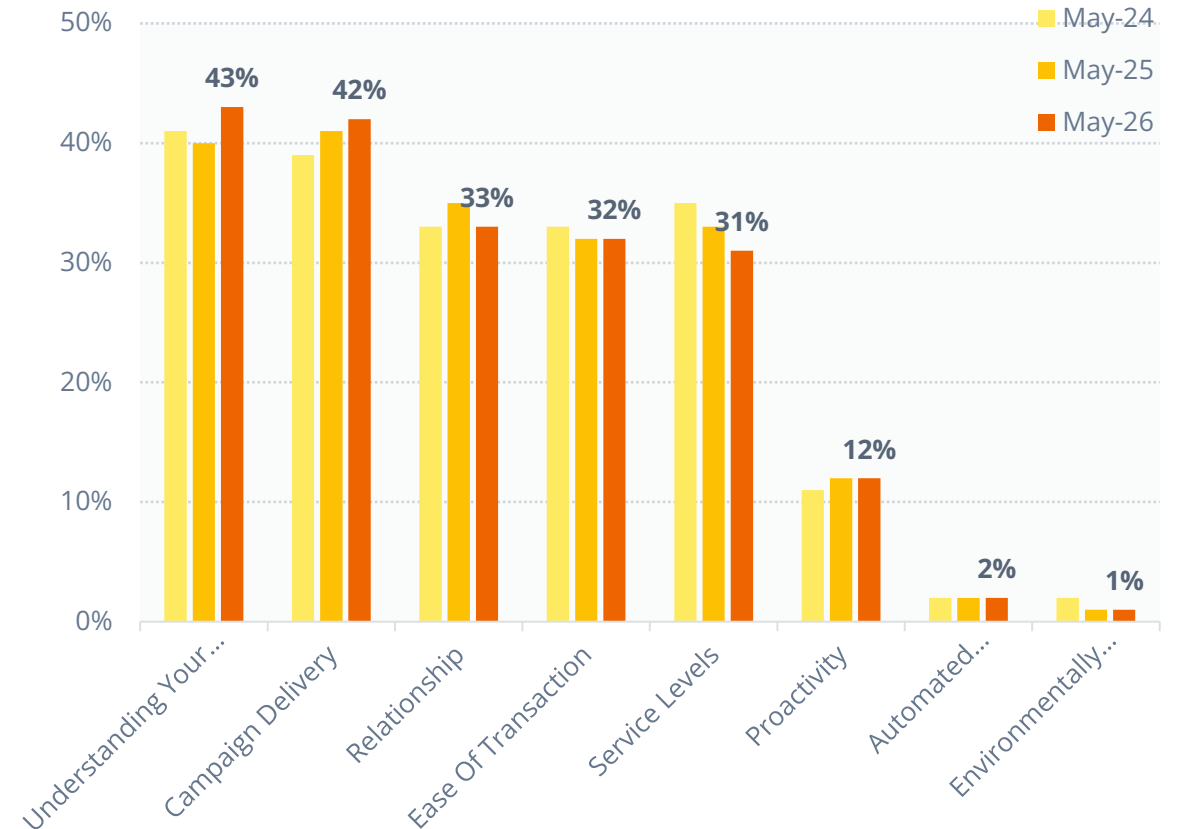


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Most Important Factors - Year on Year

'Understanding the client and category' (43%) and 'campaign delivery' (42%) - at an increasing rate - remain the most important priorities for agencies, while relationship quality, ease of transaction, and service levels continue to play a significant supporting role in partner evaluation.

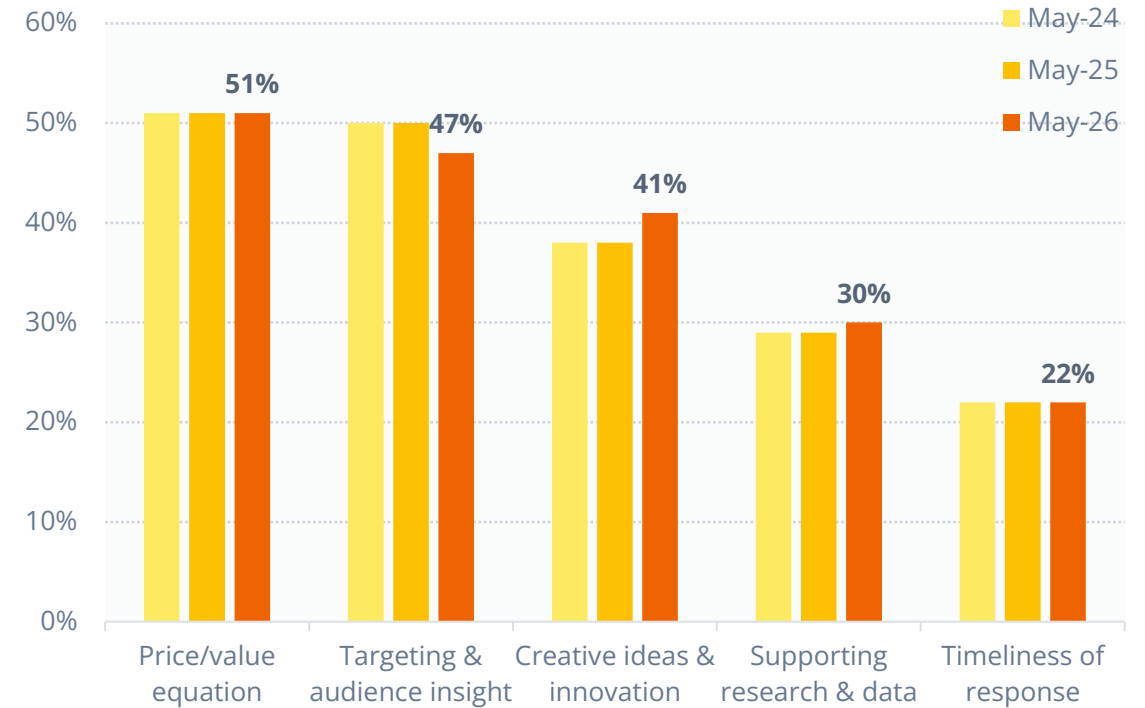
Most Important Factors When Dealing with Media Owners	May-26
Understanding Your Client & Category	43%
Campaign Delivery	42%
Relationship	33%
Ease Of Transaction	32%
Service Levels	31%
Proactivity	12%
Automated Transaction	2%
Environmentally Sustainable Business Practices	1%



Response to Brief - Year on Year

Price/value equation remains the leading priority for media agencies when evaluating response to briefs (51%), whilst an increase around the importance on creative ideas and innovation, highlight growing demand for commercially effective yet differentiated solutions

Response To Brief	May-26
Price/value equation	51%
Targeting & audience insight	47%
Creative ideas & innovation	41%
Supporting research & data	30%
Timeliness of response	22%





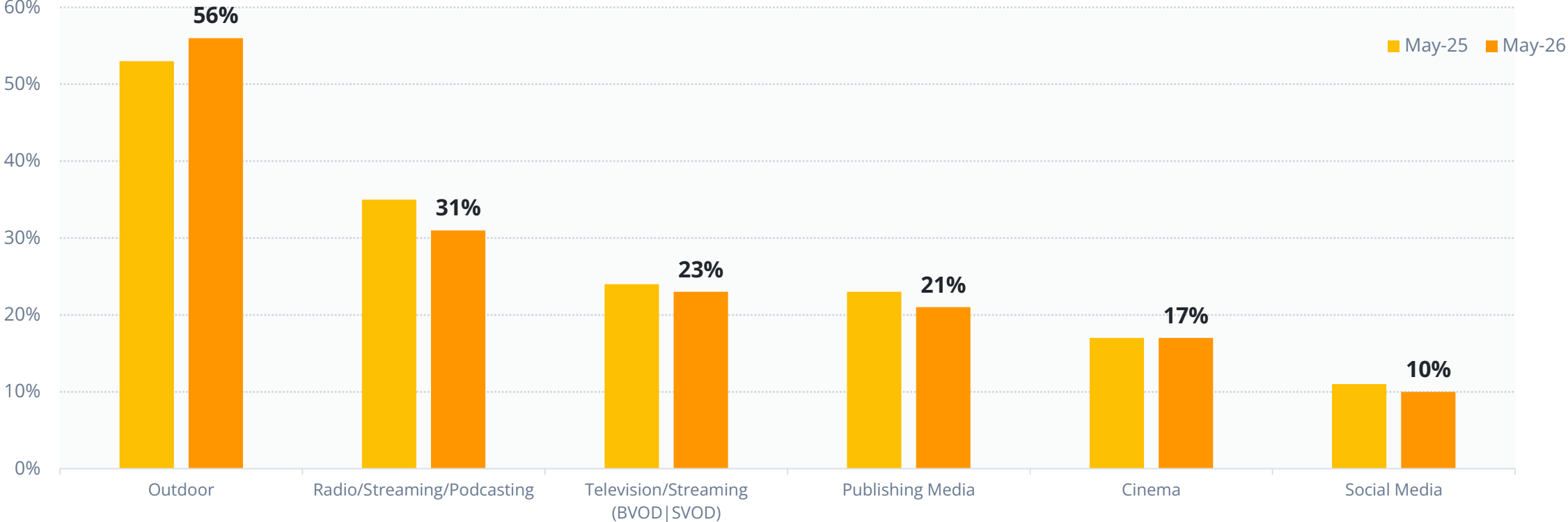
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MEDIA IMAGERY

CHANNEL PERCEPTIONS OF MEDIA AGENCIES

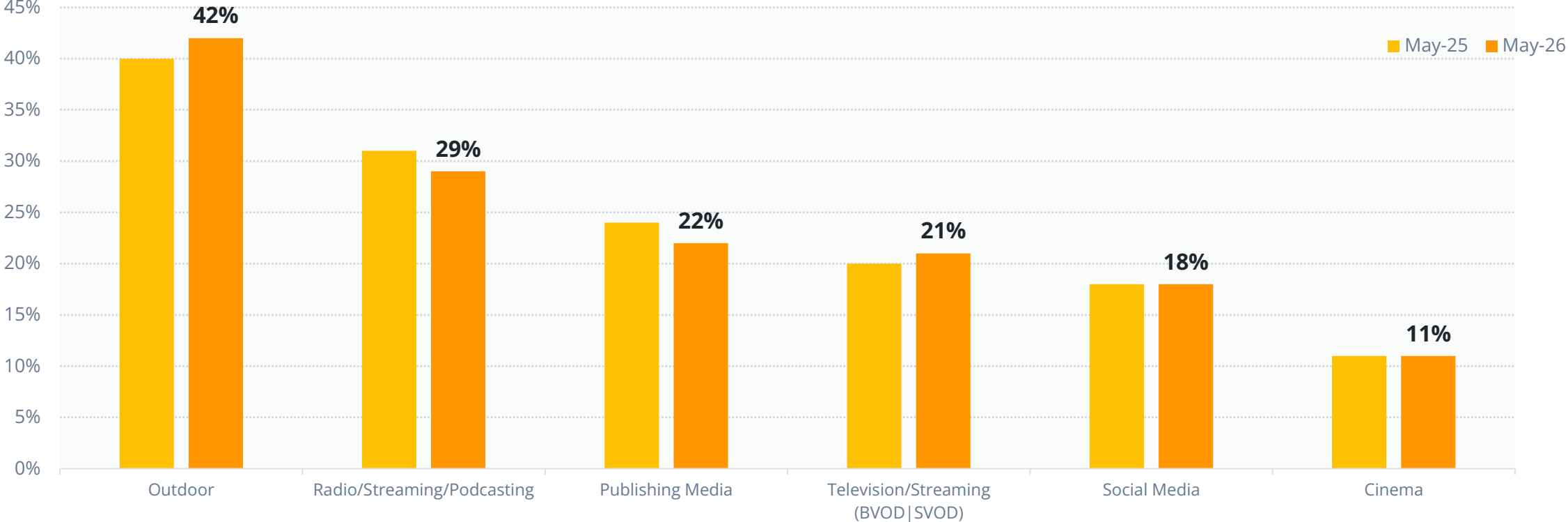


The Most Service Orientated



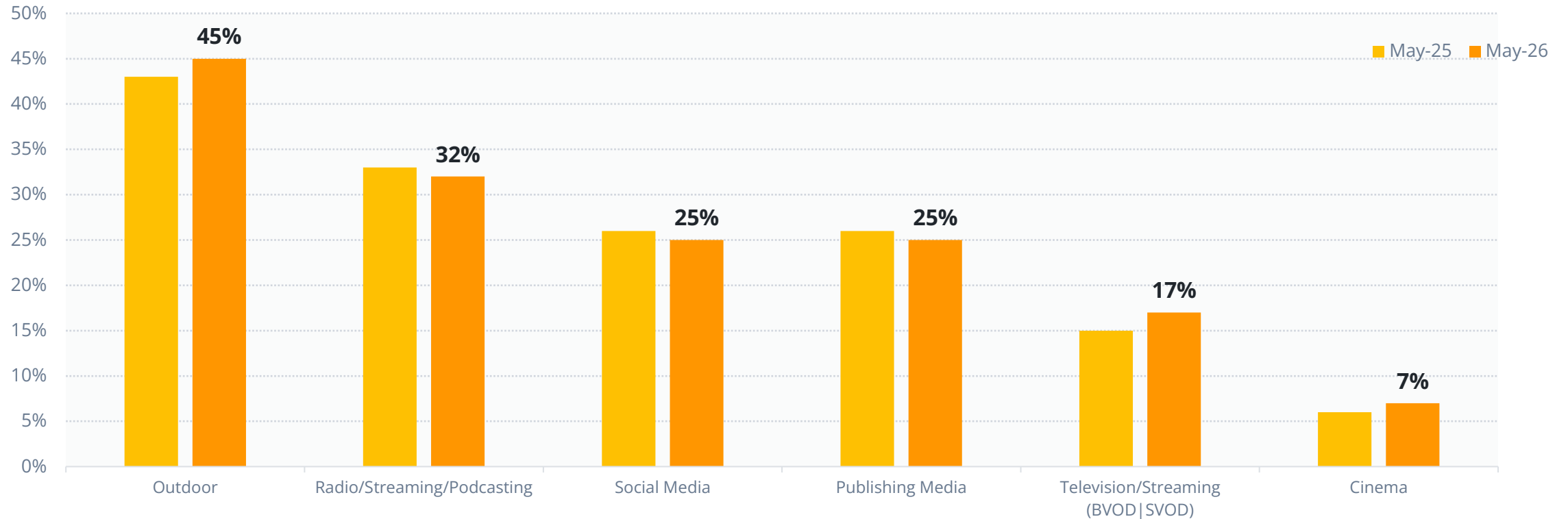
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

The Most Proactive



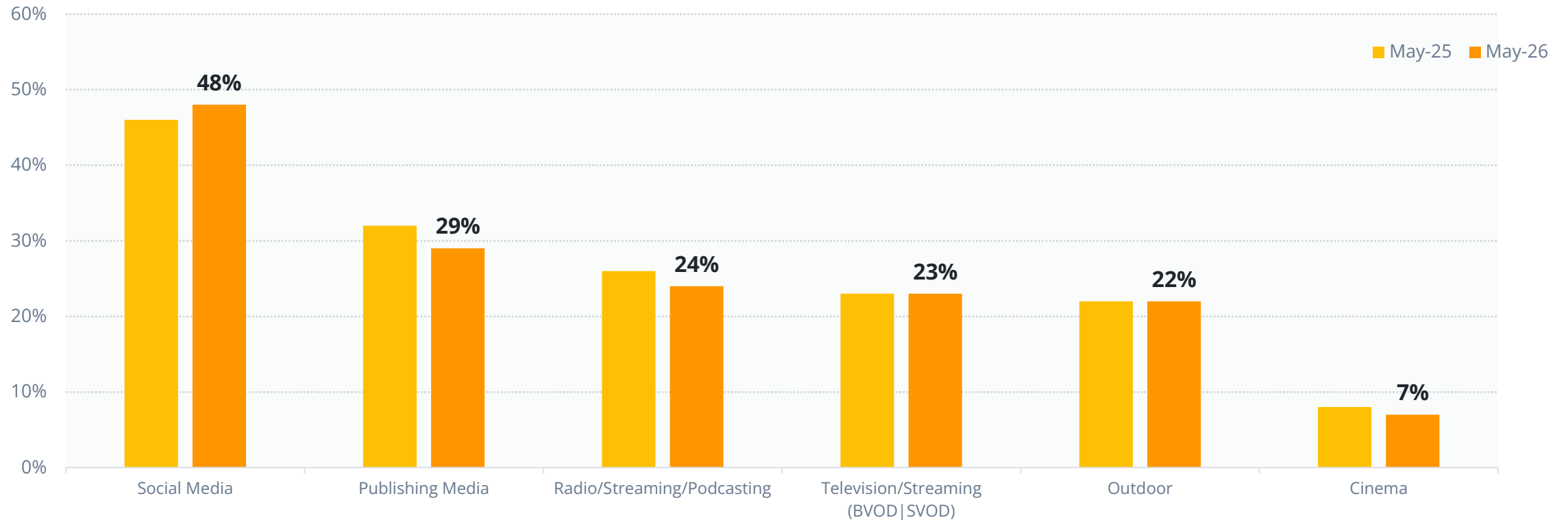
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

Delivers The Most Innovative & Creative Communication Solutions



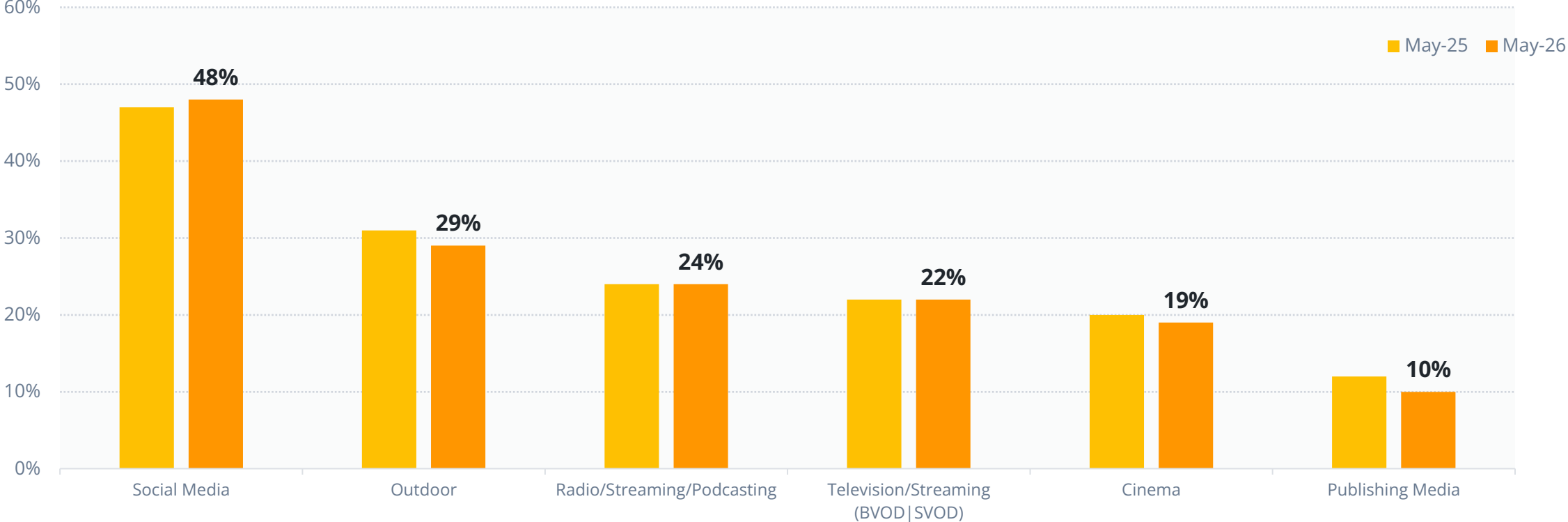
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

Provides Relevant Consumer Insights



Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish

The Easiest To Plan And Buy



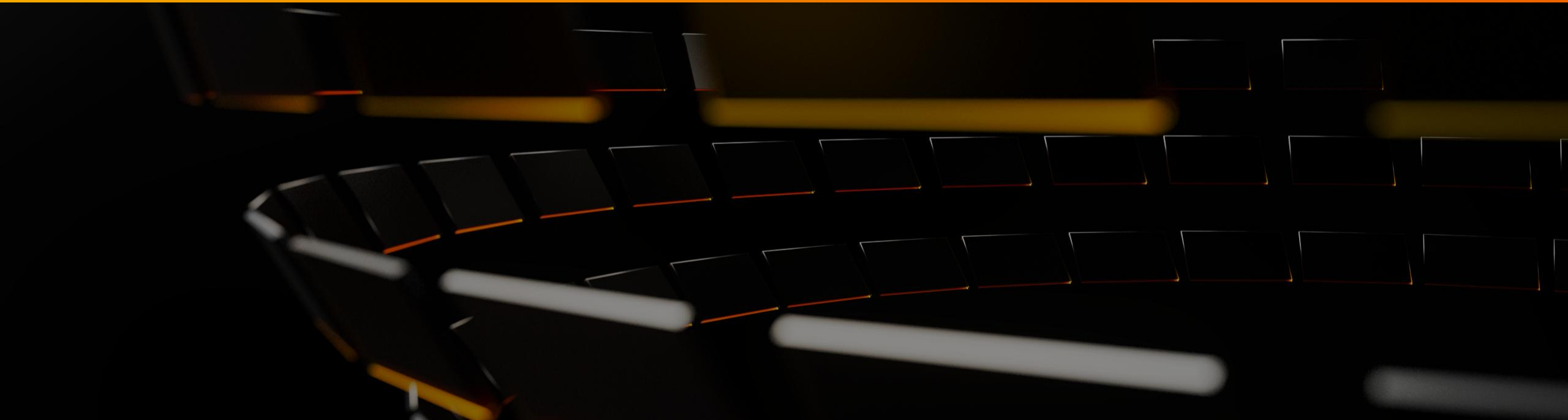
Q: Please tick the media(s) you think is most appropriate for each statement. Scale: Select as many as you wish



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MEDIA AGENCY NPS

TOTAL



National media agency NPS has increased
+3 on Oct-25 with all markets bar
Brisbane seeing improvement



Media Agency NPS - National



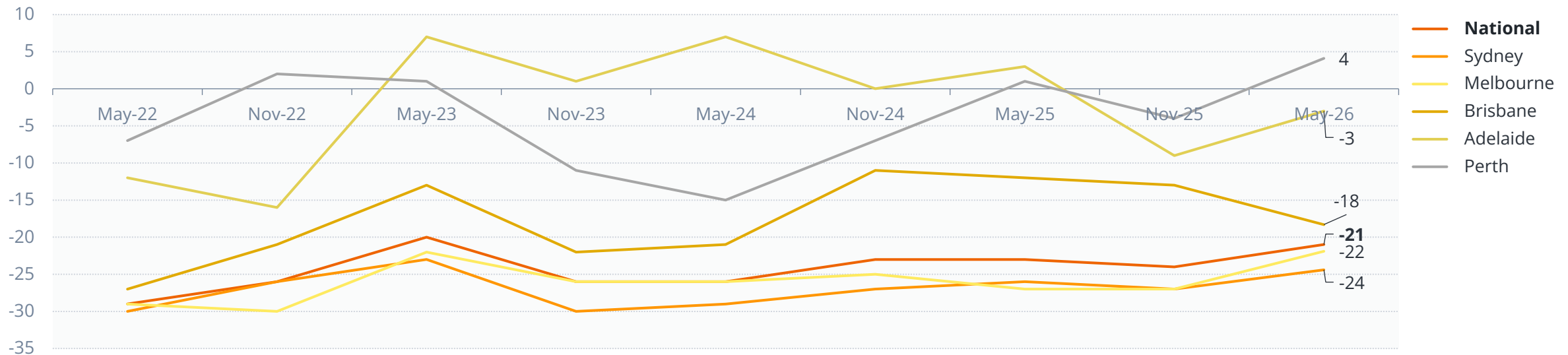
National NPS	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25	May-26
Promote	19%	19%	22%	20%	19%	21%	20%	20%	22%
Passive	33%	36%	36%	34%	36%	35%	37%	36%	35%
Detract	48%	45%	42%	46%	45%	44%	43%	44%	43%
NPS	-29	-26	-20	-26	-26	-23	-23	-24	-21



Media Agency NPS - Time Series



National NPS	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25	May-26
Promote	19%	19%	22%	20%	19%	21%	20%	20%	22%
Passive	33%	36%	36%	34%	36%	35%	37%	36%	35%
Detract	48%	45%	42%	46%	45%	44%	43%	44%	43%
NPS	-29	-26	-20	-26	-26	-23	-23	-24	-21

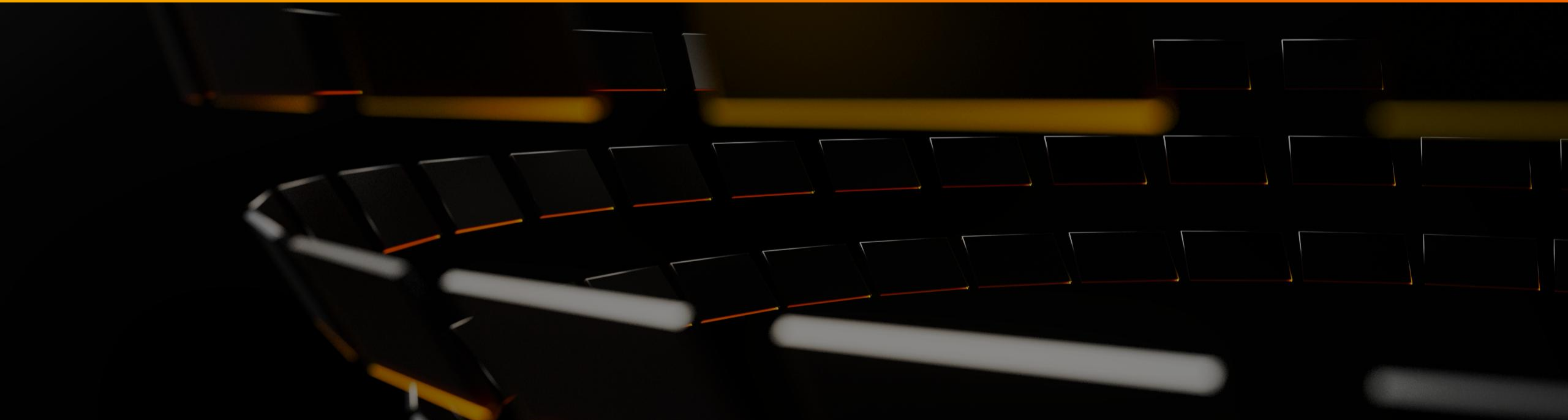




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MEDIA OWNER NPS

TOTAL



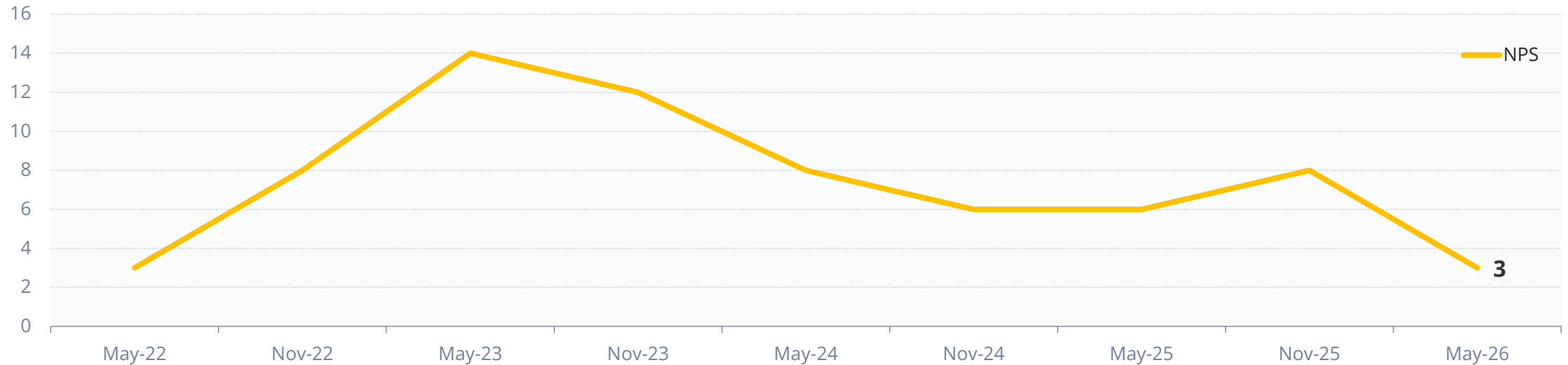
Overall media owner NPS sees a sharp decline with all channels bar AdTech experiencing decreases on Oct-25.



Media Owner NPS - National



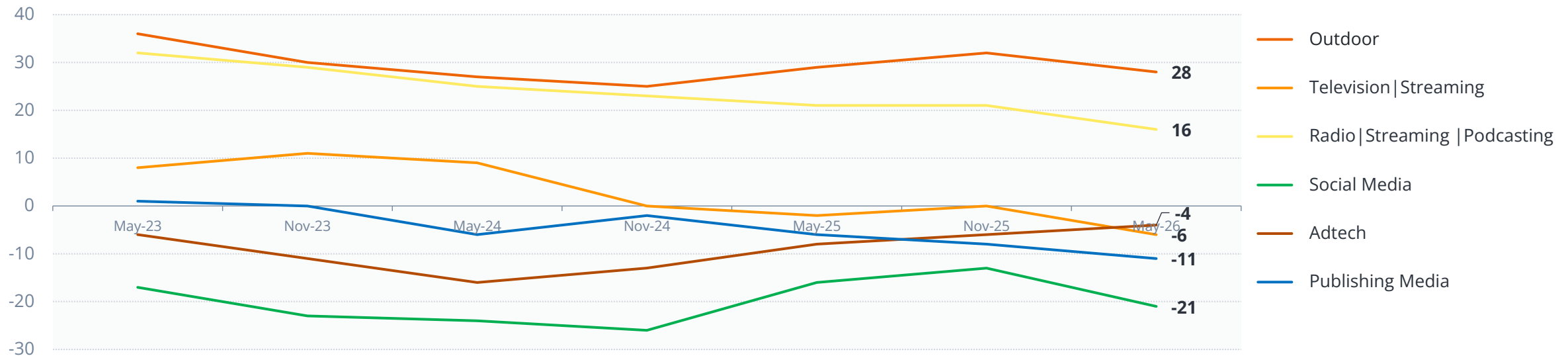
National NPS	May-22	Nov-22	May-23	Nov-23	May-24	Nov-24	May-25	Nov-25	May-26
Promote	31%	33%	36%	36%	33%	33%	33%	33%	30%
Passive	41%	41%	41%	40%	41%	40%	40%	41%	43%
Detract	28%	26%	22%	24%	25%	27%	27%	26%	27%
NPS	3	8	14	12	8	6	6	8	3



Media Owner NPS – Time Series



National NPS	Total	OOH	Radio/Streaming /Podcasting	TV/Streaming	Publishing Media	AdTech	Social Media
Promote	30%	43%	35%	24%	23%	29%	20%
Passive	43%	42%	45%	47%	43%	37%	39%
Detract	27%	15%	20%	30%	34%	33%	41%
NPS	3	28	16	-6	-11	-4	-21





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Thank You!

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