OM Thought Leadership

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The Race for Value

The AI adoption race is largely over. The value race has begun.

Chris Stephenson – Omnicom Media

OMNICOM MEDIA

Overview

One of the clearest and most consistent sentiments from this month's Advertising Week in New York is that the marketing industry does not have an AI adoption problem. Quite the opposite. Gartner reports that 98% of CMOs are now piloting or using AI. The technology already accounts for more than 15% of marketing budgets. Seventy percent of CMOs say becoming an AI leader is a critical goal for 2026.[1,2]

So far, so transformational. Except the value being created has not kept pace with the technology being adopted. In the same report, only 30% of marketing organizations tell Gartner that they have the mature capabilities required to scale AI effectively. [3] McKinsey finds that 80% of people using AI say it has improved their individual productivity, but only 37% of organizations report a positive EBIT impact. Just 6% qualify as AI high performers.[4] AI marketing company Jasper's 2026 research tells a similar story. Ninety-one percent of marketers are using AI, but only 41% say they can confidently prove its ROI.[5]

That's the tension, right there. The AI adoption race is largely over. What is now underway is the race to transform that adoption into value. Winning that race requires marketers to think about AI value in two different directions. We need to raise the floor of what our marketing organizations can reliably do; and we need to lift the ceiling of what we are ambitious enough to attempt. These are related challenges for sure – but they are not the same thing.

01

Access Is Not an Operating Model

It is easy to understand how we got here. The first phase of generative AI was largely defined by the expansion of access. Give people the tools. Encourage experimentation. Find use cases. Build pilots. Learn quickly. There was good reason to move fast. But putting powerful technology into the hands of thousands of marketers is not the same as redesigning marketing around that technology.

At Advertising Week New York, Jasper's Tom Newton put the problem succinctly: "the challenge isn't AI access anymore; it's how you deliver value from that access." That distinction matters. AI can produce more content – but without sufficient brand and business context, that content is more likely to be generic. AI can automate workflows – but automate a badly designed workflow and you can create inefficiency faster than you solve for it. AI can make decisions – but without the right data, constraints, permissions, and accountability, those decisions can simply multiply the consequences of a bad input.

Newton argued that simply giving a marketing organization AI and expecting impact is not enough. Workflows have to change. Organizational context has to be embedded. Governance has to evolve with the technology.

The same challenge surfaced in a session with Snowflake, PMG and Meta. Meta's Jason Dailey articulately framed today's requirement as "context, constraints, and consequences": the models themselves were no longer the hardest part – rather,

the challenge was integrating them into organzations, connecting high-quality data and governing how they act.

The broader evidence supports Newton and Dailey's positions. BCG's 2026 CMO research found that while 96% of CMOs say AI is driving end-to-end transformation, 42% are still primarily using generative AI to assist individuals with discrete tasks. Only around a third have substantially transformed their marketing function.[6]

This suggests a useful way to think about the race that marketing organizations are now all in: access must generate capability, which must drive performance, which must create advantage.

Most marketing organizations have achieved access. Many have increased capability. Far fewer have turned that capability into repeatable organizational performance. Fewer still have made it a source of competitive advantage. The AI value gap is increasingly an operating-system problem, not a technology-access problem.

02

Building Value in Two Directions

So what should the system around AI actually be designed to achieve? We suggest two things. In the race for value, marketing organizations should firstly be aiming to **raise the floor** – using AI to improve the underlying performance of marketing. Make work faster. Reduce friction. Increase throughput. Improve consistency. Expand production capacity. Shorten learning cycles. Remove low-value manual work. Improve the quality and reliability of repeatable tasks. This is about turning technical potential into better operating performance.

At the same time, the goal is to **lift the ceiling** of what's possible. Use that new capacity and capability to increase the ambition of marketing itself. Create experiences that were previously too expensive to build. Produce forms of relevance that were previously impossible to scale. Experiment more often. Solve bigger customer problems. Enter culture differently. Give communities more to participate in. Spend more human time on judgment, ideas, relationships and invention. This element is about using technology to expand what marketing can attempt.

This articulation goes beyond the well-established formulation of efficiency versus effectiveness. Raising the floor and lifting the ceiling should both prove effective. The difference is between doing existing things substantially better and making new things possible in the first place.

03

Raising the Floor

There is already plenty of evidence that AI can dramatically change the economics of existing marketing work. At Advertising Week, Home Depot's Molly Battin described how the company is using smaller campaigns as test beds for new AI-enabled ways of working. In one example she shared, a process that had taken around twelve weeks was reduced to approximately two-and-a-half, with fewer people required to be hands-on with the work. Crucially, the objective wasn't simply to eliminate costs. Battin talked about getting people out of rote tasks and back into the work they joined marketing to do.

ElevenLabs demonstrated the same shift from the production side. Creative production is increasingly being asked to feed media systems that can use vastly greater numbers of creative variants – across audiences, formats, contexts and languages. ElevenLabs showed examples including Ryanair generating localized voiceovers in under ten minutes, helping creative decisions happen much earlier in the process. Individual creators are

experiencing the same change. One panelist described using AI to reduce a three-to-four-hour video-editing workflow to around ten or fifteen minutes. Jasper's wider research finds half of marketers bringing work to market faster because of AI, while 45% report reduced operating costs.[7]

All of which looks like a straightforward productivity story. Except it isn't. Because AI doesn't automatically remove complexity. In poorly connected organizations it can simply move complexity somewhere else. More output creates more things to approve. More agents create more decisions to govern. More content requires more brand consistency. More data creates more opportunities for conflicting signals. Faster execution increases the consequences of errors that previously travelled through the organization slowly.

One speaker posed a useful stress test: if an agent acts on a bad datapoint at 2 a.m. and thousands of decisions follow as a result, could the organization by 10 a.m. the next morning reconstruct why it failed? At agentic scale, accountability stops being a policy document and becomes an infrastructure requirement.

So, raising the floor requires more than automation. It requires connected workflows, usable data, persistent context, clear measurement and accountability built into the process. The technology expands what is possible; the system around it determines whether possibility becomes performance.

04

Democratizing Capability Faster Than Distinction

Here is where things get more interesting. If AI gives everyone access to extraordinary new capabilities, what happens when extraordinary capability stops being extraordinary?

The barriers to competent execution are falling. Production becomes faster. Research becomes easier. Translation becomes cheaper. Personalization becomes more accessible. Ideas can be visualised immediately. Campaign variants can proliferate. Smaller businesses and creators gain access to capabilities previously available only to well-resourced organizations.

"The AI value gap is increasingly an operating-system problem, not a technology-access problem."

That's an enormous opportunity. But it also means that access to the capability itself becomes less differentiating. At Advertising Week, Dentsu X's Bruce Williams described technology as having a potentially flattening effect on brands: it can lead you to market, he argued, "but it doesn't make you different once you arrive."

A creator on another panel arrived at almost exactly the same conclusion from the opposite direction. Arjay McCandless described how AI had given him the ability to pursue far more with a tiny team – but everybody else entering the business had access to those tools too. His response? "You have to scale your ambition – a lot."

That may be one of the most important marketing implications of this phase of AI: that AI can democratize capability faster than it democratizes distinction. The more accessible competent execution becomes, the less competent execution alone is as a source of advantage.

Which means marketers need to look upward.

05

Lifting the Ceiling

The most valuable question may therefore not be: what can AI currently do for us? – but what can we now do that wasn't possible before?

The answer will be different for every marketing organization. For some it might mean creating hundreds of genuinely useful creative variations where previously there were five. For others it looks like connecting commerce, content and customer service into a single experience. It might mean experimenting with ten ideas instead of choosing one based largely on instinct. Or serving a small but valuable community far more deeply because the economics of doing so have changed. It might mean using AI to handle the repeated analysis and reconciliation of data so highly skilled people can spend more time interpreting what it means. Or it might simply mean giving marketers more time to think.

That last point is important. Omnicom Media's Katie Klein argued at Advertising Week that AI will increasingly perform work such as targeting, incrementality analysis, budget allocation and optimization. The human contribution moves toward judgment: making strategic bets where complete information doesn't exist, drawing on experience and deciding where the organization should take risk. Klein's argument was a recurring theme: another panel argued that however sophisticated the decision engine becomes, there still needs to be "a layer of judgment over the top".

Nick Law made a related distinction earlier in the week. Data, he suggested, is often "broad but thin" – an abstraction of experience based largely on the recent past. Expert intuition instead is "narrow but rich". His advice was simple: don't wait for the data to supply every answer.

This isn't an argument that humans possess some permanent magical quality that machines will never replicate. Rather, it's an argument about scarcity. When execution is expensive, the ability to execute has value. When execution becomes abundant, it's the ability to decide what is worth executing that becomes more valuable.

The same applies to taste. Lived experience. Distinctive brand meaning. Proprietary knowledge. Relationships. Cultural understanding. The confidence to do something that the optimization model would never have recommended – because nobody has done it before. A creator-economy panel put this neatly: AI would provide greater velocity and acceleration, but there would be an increasing premium on real human experience, knowledge and discernment.

This is the ceiling. Not more AI. More ambition made possible by AI.

06

The Four Positions in the Race for Marketing Value

Taken together, the two dimensions of raising the floor and lifting the ceiling suggest the emergence of four different positions that marketing organizations can occupy.

The Fragile Innovator Low floor · High ceiling	**The Value Leader** High floor · High ceiling
The Tool Adopter Low floor · Low ceiling	**The Efficient Operator** High floor · Low ceiling

The Tool Adopter – Low floor. Low ceiling. AI is everywhere, but primarily as licenses, individual tools and experiments. Adoption metrics look healthy; organizational performance has moved much less.

> **"At agentic scale, accountability stops being a policy document and becomes an infrastructure requirement."**

The Fragile Innovator – Low floor. High ceiling. The organization has ambition. Interesting prototypes appear. Teams experiment with new experiences and new forms of marketing. But the data, workflows, governance and organizational infrastructure required to make those ideas repeatable haven't caught up. Innovation remains a succession of pilots.

The Efficient Operator – High floor. Low ceiling. AI is integrated into the organization. Processes are faster. Costs fall. Productivity rises. But most of the value comes from optimising marketing the organization already knows how to do. This is a perfectly legitimate place to create value, but it also carries the risk that you become extremely efficient at doing what everybody else can now do too.

The Value Leader – High floor. High ceiling. The organization builds the operating infrastructure required to turn AI capability into repeatable performance — then uses that performance to pursue greater ambition. Efficiency creates capacity.

Better intelligence creates opportunity. Automation moves human contribution toward higher-value problems. And new capability is measured not only by what it saves, but by what it makes possible.

That top-right quadrant is where the real AI value race is being run.

07

Running the Race

For CMOs, this creates two distinct but simultaneous agendas.

To **raise the floor,** redesign workflows before automating them. Give systems organizational context rather than simply prompts. Connect the data required to make better decisions. Define where accountability sits. And measure AI against business outcomes rather than adoption itself. In this context, the number of employees using an AI tool is not a measure of transformation. Nor is the number of assets generated. As one measurement panel put it, "measurement without action is performative". AI adoption metrics tell marketers that technology is being used; they tell us very little about whether it is creating value.

To **lift the ceiling,** organizations need to be equally deliberate about what happens to the capacity they create. Some efficiency should absolutely be banked as efficiency. AI does not somehow fail if it simply makes something cheaper. But marketers should also ask where released capacity could create greater value elsewhere. Could a production saving finance more experimentation? Could time which has been saved from reporting move into interpretation? Could faster localization enable genuinely local ideas rather than just local versions? Could better audience intelligence improve the customer experience rather than simply improve targeting? Could technology allow a brand to build something useful, entertaining or participatory that the previous economics of marketing made unrealistic?

The opportunity for marketing organizations now goes beyond a zero-sum trade-off between automation and ambition – instead it is designing systems capable of doing both. To drive growth, marketing needs connected systems that can carry intelligence, decisions and learning across data, media, content, commerce and measurement – raising the floor of organizational capability while lifting the ceiling of what's possible. Because the technology isn't the system – and increasingly, it isn't the differentiator either.

08

Five Questions for Marketing Organizations

To consider how well their marketing system is delivering against both dimensions, organizations should start by asking five questions.

1. Where is AI genuinely improving performance – rather than simply increasing usage?

2. Which workflows have we redesigned, rather than merely automated?

3. What capacity has AI released – and where have we deliberately chosen to reinvest it?

4. What can we attempt today that previous economics, speed or complexity made unrealistic?

5. And finally, if our competitors have access to the same technology, what makes the output of our system different?

That last question will only become more important. In the post-AI adoption race for growth, the winners will be marketing organizations that combine distinctive intelligence with connected systems capable of turning ubiquitous capability into differentiated value.

Raise the floor. Lift the ceiling.

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