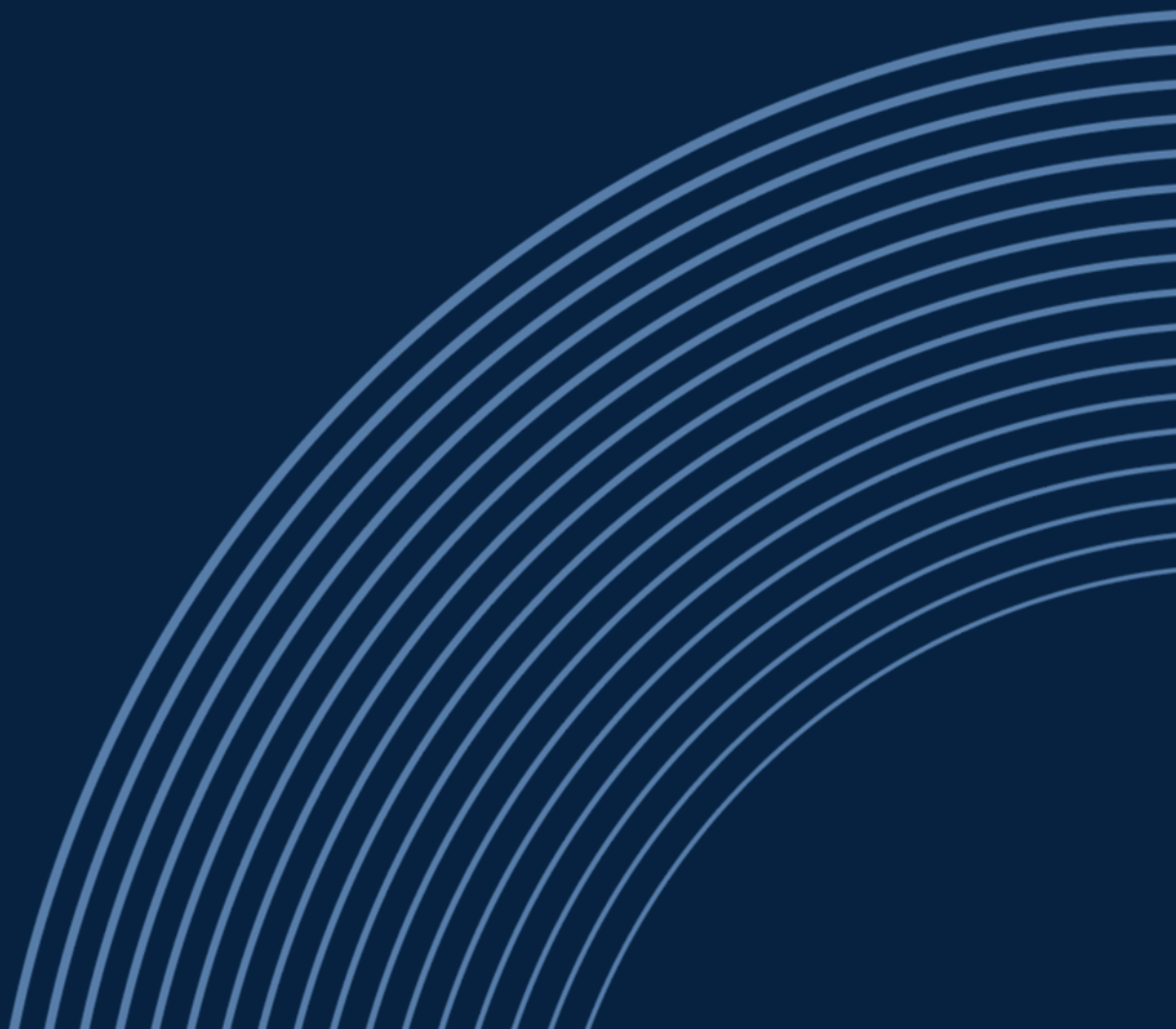




State of Audience in Media Report

2026



To media and audience leaders,

The clearest finding in this year's report is not about what publishers are missing. It is about what they already have and still are not using.

More organizations now have a meaningful base of known, addressable audience than at any point in recent memory. Email and newsletters are outperforming every other growth and retention channel by a wide margin. The case for owned audience has been made, accepted, and budgeted for. Publishers understand what matters.

The harder finding is what comes next. Only 9% say their organization uses audience data extremely effectively to inform decisions. Only 2% say they are confident that data is accurate and reliable across systems. Fifty-nine percent say fragmentation slows, constrains, or prevents execution. The audience is there. The insight is not reaching the people and systems that would act on it.

That is the central operating problem for 2026. Not strategy. Execution.

It shows up in revenue performance too. Events held up. Subscriptions were mixed. Advertising fell short for most of the publishers in this sample. The revenue lines that performed best were the ones tied most directly to audience relationships that publishers own and control. The ones that struggled most were the ones that depend on attention publishers borrow.

AI adds a harder edge to that pattern. Twenty-six percent of respondents named AI-driven disruption as their biggest external threat. Forty-one percent say they are not measuring AI-driven traffic at all. Distribution is shifting again, and many teams are still building their measurement approach while the shift is already underway.

None of this is a reason for pessimism. The publishers in the best position heading into 2026 are the ones that have already committed to the foundation: known audience, direct channels, connected data, and the operational discipline to act on what they know without waiting for the conditions to get easier.

That is what this report is built around. Not what to do in theory. What the market is actually doing, where execution is breaking down, and where the next round of work belongs.



Tony Napoleone
VP, Client Experience

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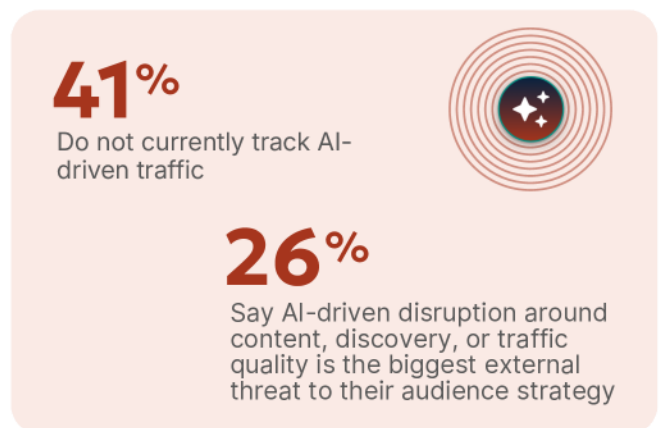
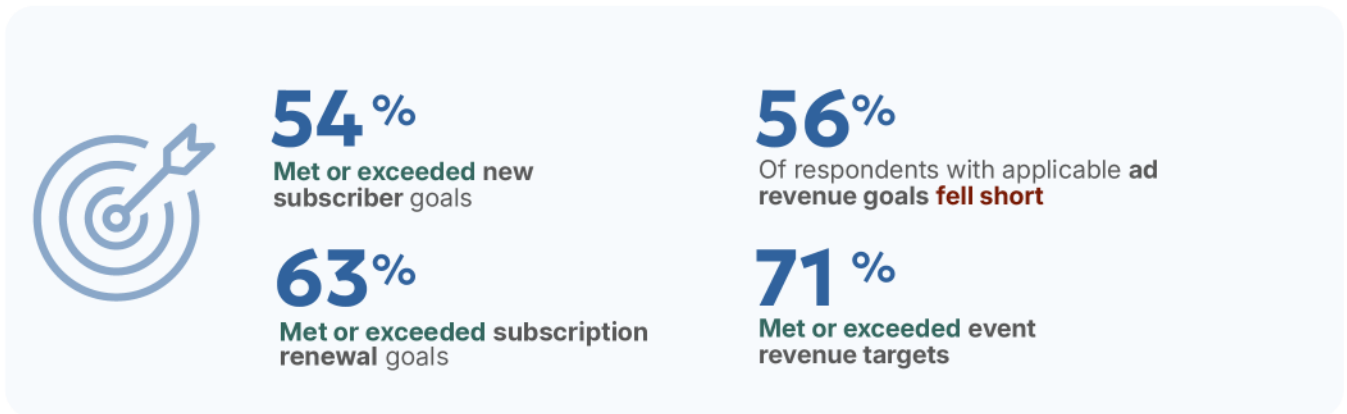


Executive Summary



Audience teams are no longer judged on reach alone. In 2026, publishing leaders expect audience strategy to support three connected outcomes at once: grow owned audience, deepen engagement, and contribute to revenue.

This year's survey shows an industry that understands that shift and still struggles to execute against it consistently. **Email and newsletters remain the clearest direct growth engine**, with 67% of respondents naming them as a top audience growth driver. They are also the strongest retention play, with 68% saying newsletters or digest products are their most effective tactic for keeping audiences engaged and returning.



Executive Summary



The challenge lies in **turning audience insight into action**. Only 9% of respondents say their organization uses audience data extremely effectively to inform personalization, product decisions, or go-to-market strategy. Only 2% say they are extremely confident that audience data is accurate and reliable across systems. Meanwhile, 59% say fragmented data slows, constrains, or prevents execution, and 71% say having audience data centralized in one place is either critical or essential to better decision-making. These results reinforce a theme from last year's report: **media organizations largely agree on the strategic value of audience data, but far fewer have built the systems and workflows needed to act on it consistently.**

The priorities for 2026 reflect that reality. Teams are investing where they have the greatest control:

- Growing owned audience
- Improving retention
- Improving audience data quality across systems
- Making workflows more efficient

The emphasis is practical. This is less a year of broad experimentation than a year of tightening the foundation.

That focus is taking shape against an uneven revenue backdrop. Among respondents with applicable targets, **56% fell short of ad revenue goals** over the past year. Events performed better, with 71% of respondents with applicable event revenue targets meeting or exceeding those goals. Subscriber-related performance was less decisive: 54% met or exceeded new-subscriber goals, and 63% met or exceeded subscription-renewal goals. **The pattern suggests a market where advertising remains under pressure, events are holding up more effectively, and subscriber performance is still uneven rather than broadly strong.**

AI adds another layer of pressure. Twenty-six percent of respondents say AI-driven disruption around content, discovery, or traffic quality is the biggest external threat to their audience strategy. Yet **41% say they do not currently track AI-driven traffic at all** or are not sure how much they receive.

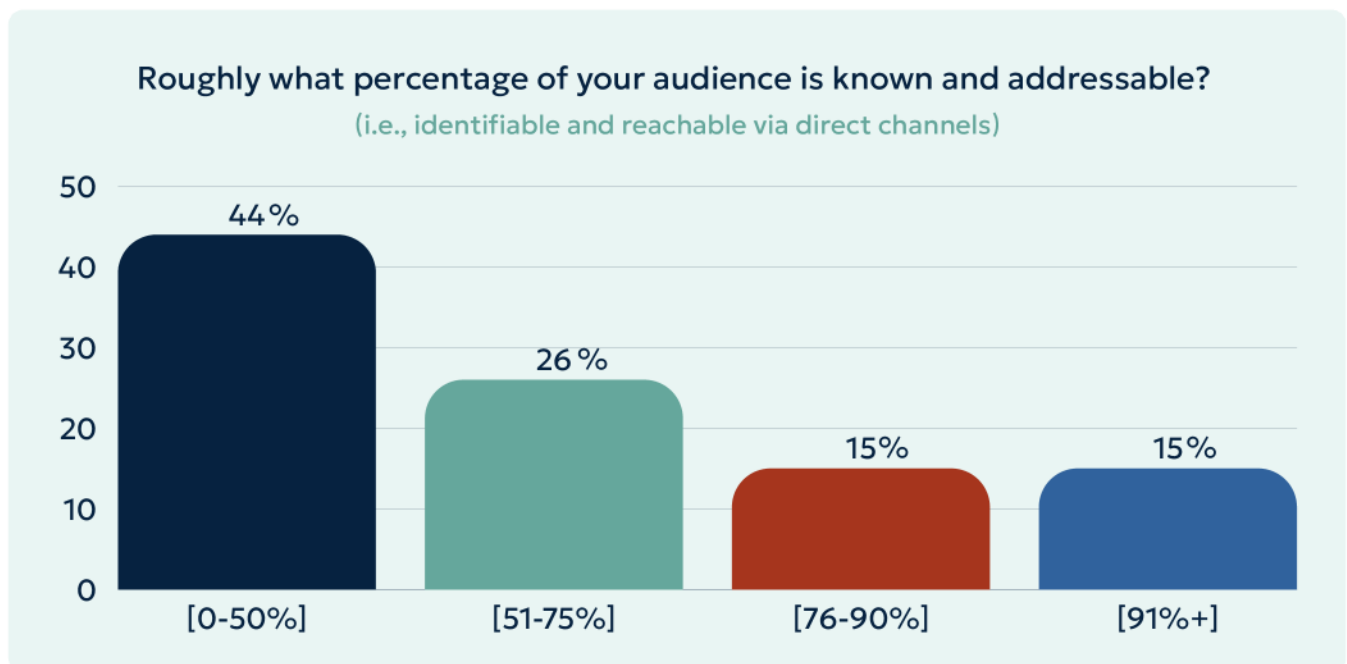
The message for 2026 is direct. **Audience advantage comes less from collecting more data and more from trusting it, connecting it, and acting on it faster.** Publishers that reduce the distance between insight and execution will be in a stronger position than those that keep adding complexity without improving coordination.

Audience Strategy



Moving past collection, but activation still lags

More publishers now have a real base of known, addressable audience. Fifty-seven percent of respondents say more than half of their audience is known and addressable. That matters in a market where media organizations have spent years dealing with traffic volatility, privacy changes, and less dependable third-party signals.



At the same time, one of the clearest themes from last year's report remains in place: **recognizing the value of audience data is not the same as using it well.** In 2025, audience data was widely viewed as a competitive advantage, yet only 9% of respondents felt their approach was very effective. This year, that execution gap looks just as persistent, with only 9% saying their organization uses audience data extremely effectively to inform action.

2025

9%

felt their approach to using audience data was very effective

2026

9%

say their organization uses audience data extremely effectively to inform action

Less Friction, Better Execution

This year's open-ended responses point to a common problem: audience strategy often matters more in principle than it works in practice.

Audience Development was the most common answer to the question of who owns audience strategy, but responses were spread across leadership, marketing, product, and other functions, with some respondents describing shared or unclear ownership. That suggests many publishers still have not settled on a clear operating model.

38% Audience / Audience Development

16% Executive Leadership

14% Other functional owner

10% Marketing

9% Shared Ownership

5% Product

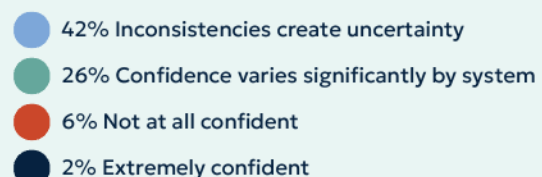
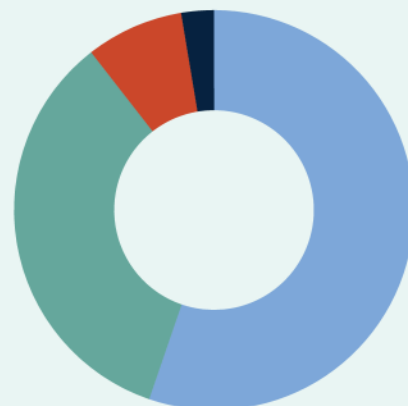
7% No clear owner/unclear

The same pattern showed up when respondents described the one capability they would add next. Most did not ask for flashy new tools. They asked for better integrations, stronger reporting, more personalization, and more staff capacity. The message is straightforward: **many teams know what they want to do, but still face too much friction across systems, teams, and workflows.**

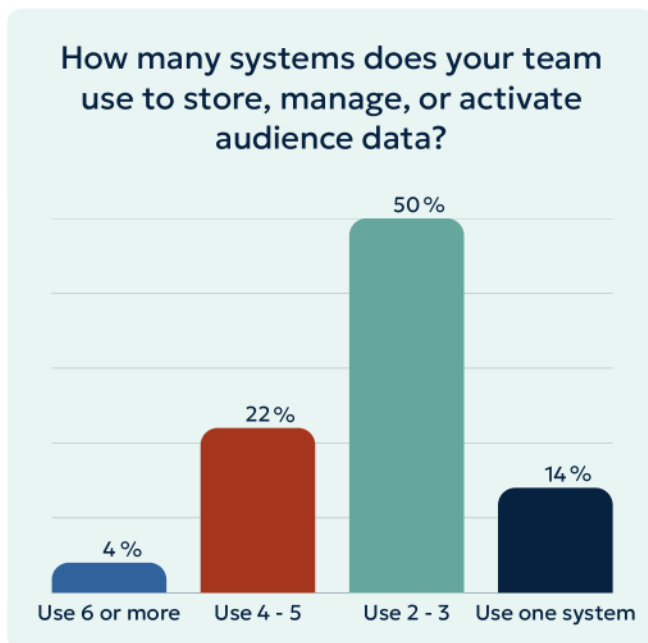
Still, a larger known audience has not solved the harder operational problem. Knowing more about readers, subscribers, registrants, and prospects does not automatically improve how well teams use audience data across editorial, product, marketing, sales, and revenue strategy.


Confidence in audience data remains one of the weakest points in this year's findings. Only 2% of respondents say they are extremely confident that their audience data is accurate and reliable across systems. Most describe a more complicated reality. Forty-two percent say inconsistencies create uncertainty. Twenty percent say confidence varies significantly by system. Six percent say they are not at all confident.

How confident are you that your audience data is accurate and reliable across all the systems your team uses?



The stack is a major part of that problem. More than a quarter of respondents use four or more systems to store, manage, or activate audience data. Only 7% say those tools are fully integrated. **For most teams, the real operating model still includes partial integration, manual workarounds, and system gaps that slow response time.**



Only 7%  Say their tools are fully integrated.

That friction shapes more than reporting. It affects how quickly teams act, how much they trust the signal in front of them, and whether audience insight travels far enough across the organization to change a product decision, sharpen a campaign, or improve monetization.

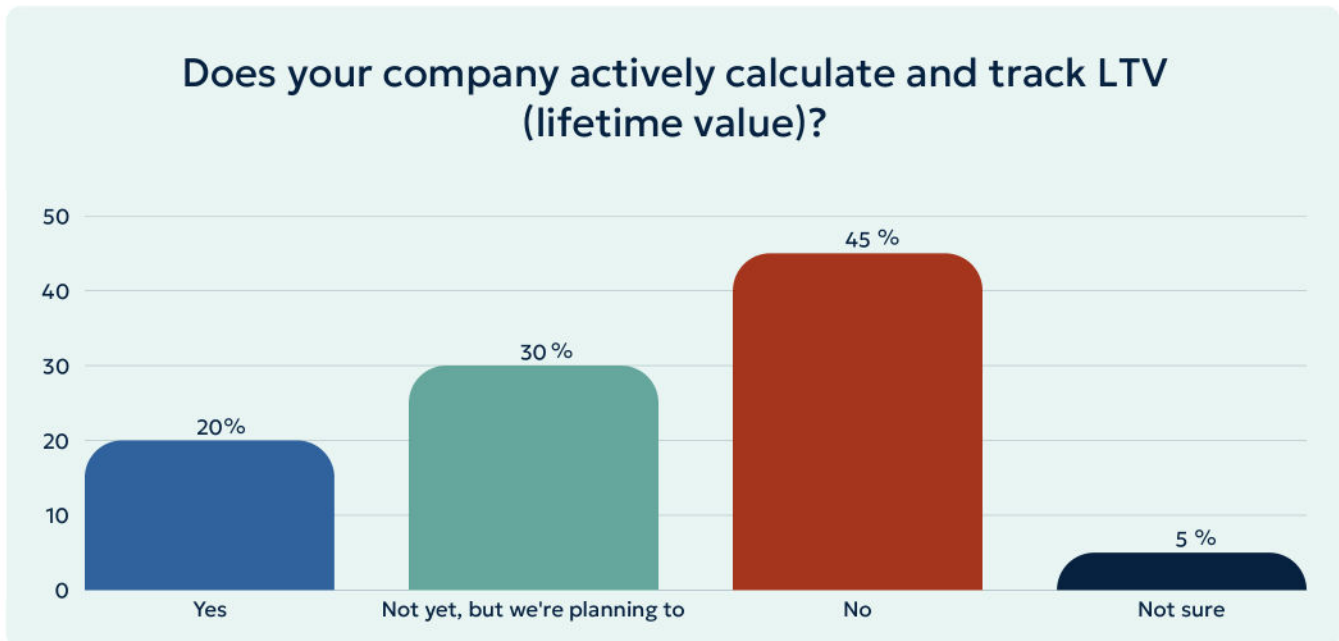
Budget is the most-cited constraint on audience execution, though it is not the only one. Organizational alignment, skills, and technology infrastructure follow closely behind. The pattern suggests a broader operating issue. **Many teams are not dealing with a single missing tool or a single funding gap. They are dealing with disconnected ownership, uneven workflows, and too many steps between insight and action.**

That helps explain why activation continues to lag. Just 9% say their organization is extremely effective at using audience data to inform action. Most respondents sit in the middle. Their teams collect data. They review reports. They surface useful insights. The drop happens after that point, when **those insights fail to reach the systems or decision-makers that would turn them into better audience experiences or stronger commercial outcomes.**

“ Audience advantage is less about collecting more data and more about trusting it, connecting it, and acting on it faster.

Lifetime Value

The same pattern appears in value measurement. Only 20% of respondents say their company actively calculates and tracks lifetime value. Another 30% say they plan to but have not started.



Without that shared framework, audience work often gets judged through short-term metrics that miss the real value of retention, repeat engagement, and audience quality over time.

The implication is less about data volume and more about operating discipline. Publishers have made progress in building known audience. The bigger question now is whether they are set up to use that advantage across the business.

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Only 20% of media respondents say that they are **actively tracking audience lifetime value.**



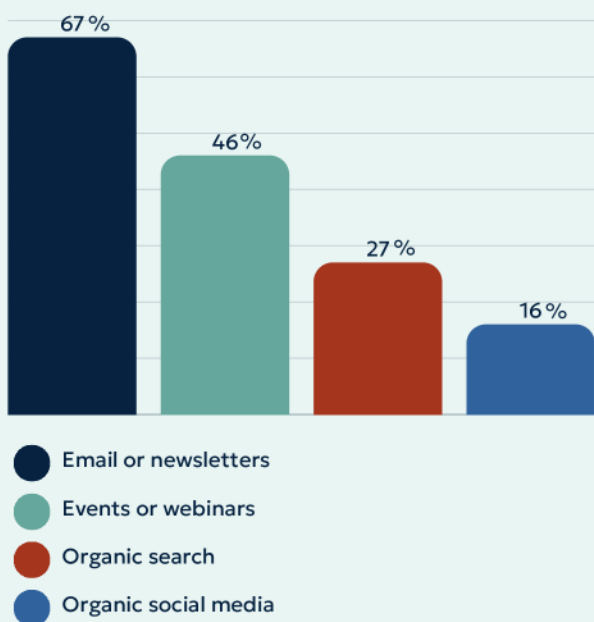
Owned Channels

Where audience value is being built



The strongest growth signals in this year's survey come from channels publishers control more directly. **Email and newsletters stand out well ahead of every other option**, named by 67% of respondents as one of the top drivers of audience growth in the past 12 months. Events and webinars rank second at 46%.

In the past 12 months, which channels or tactics have driven the most audience growth? Select up to 3.



Organic search and organic social still matter, though both trail direct channels. Organic search comes in at 27%. Organic social follows at 26%. That gap points to a clear shift in emphasis. External platforms still help publishers attract attention, though direct channels are carrying more of the dependable growth load.

The retention picture is even clearer. Newsletters or digest products rank as the top retention tactic, selected by 68% of respondents. Coordinated multi-channel engagement across email, site, and social comes in a distant second at 32%. Events, community building, and audience experiences follow at 27%. That finding builds on what we saw last year, when newsletters had already emerged as a leading audience driver. In this year's results, their role looks even more central, supporting both growth and retention in a market where direct relationships are carrying more strategic weight.

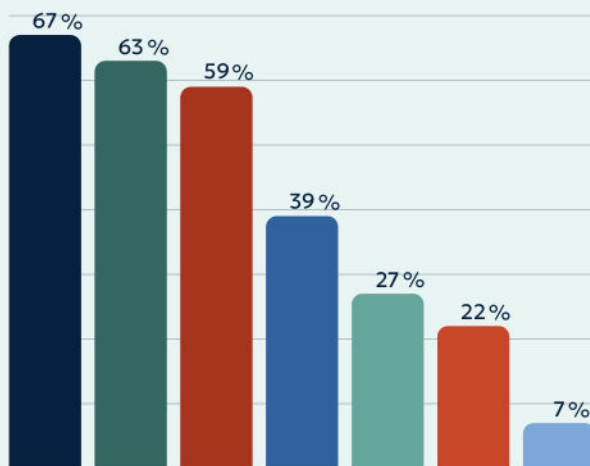
What's your most effective audience retention tactic right now? (How are you keeping subscribers or audience members engaged and coming back?) Select up to 2.



This is one of the clearest findings in the survey. **Retention is no longer a side goal or a downstream result. It sits near the center of audience strategy.**

That logic shows up again in where teams are placing their 2026 bets. The top planned investments are growing owned audience at 67%, improving retention and reducing churn at 63%, improving audience data quality and cross-system integration at 59%, and improving workflow efficiency and scalability at 39%.

What are the top audience development investments you are making in 2026?



- Growing owned audience
- Improving retention and reducing churn
- Improving audience data quality and cross-system integration
- Improving workflow efficiency and scalability
- Expanding audience reach
- Improving ability to measure audience marketing performance
- Ensuring compliance, governance, and privacy standards

The mix matters. Audience teams are not only asking how to grow reach. They are asking how to grow reachable audience, improve repeat engagement, and make direct relationships more durable across the business.

There is a practical reason for that shift. Platform dependence remains a structural risk. Search changes, social volatility, referral shifts, and privacy rules all make externally controlled channels less predictable. Owned channels do not remove that pressure, though they give publishers more control over identity, engagement, and monetization than rented attention alone.



For leaders making budget decisions, this section of the survey is especially useful. It suggests that audience resilience is increasingly built through habits and relationships that publishers control directly. Discovery still matters. **Direct connection is where more long-term value gets created.**

Monetization

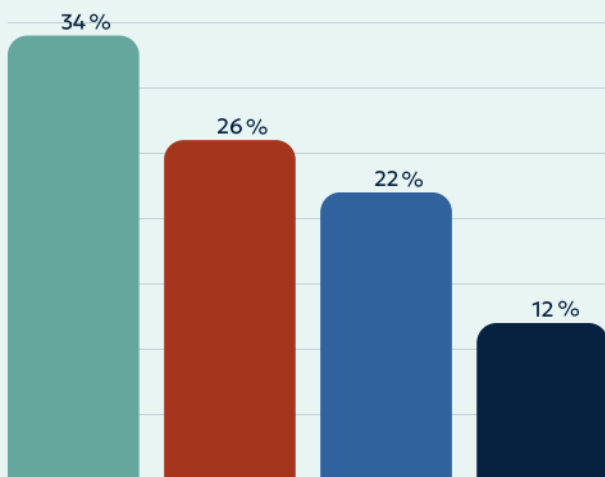


Improving in some areas and stalling in others

Audience monetization remains more uneven than mature for many publishers. Most teams are collecting engagement signals. **Fewer are using those signals in a way that consistently shapes revenue decisions.**

Thirty-four percent of respondents say audience engagement data supports select revenue initiatives. Twenty-six percent say it actively shapes how they package, price, or sell inventory. Only 12% say it directly drives revenue decisions. Another 22% say they review engagement data but rarely operationalize it.

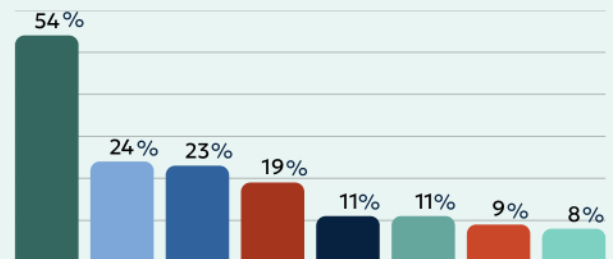
How directly does audience engagement data influence your revenue strategy?



- We use it to support select revenue initiatives
- It actively shapes how we package, price, or sell inventory
- We review engagement data, but we rarely operationalize it
- It directly drives revenue decisions

That gap shows up again when respondents describe what is holding monetization back. **Time and resource constraints are the biggest obstacle by a wide margin, cited by 54% of respondents.** Lack of team expertise follows at 24%. Organizational misalignment comes in at 23%. Insufficient tools for activation or monetization sits at 19%.

What's holding back greater monetization of your audience data? (Select up to 2.)



- Time/resource constraints
- Lack of team expertise
- Organization misalignment
- Insufficient tools for activation or monetization
- Limited advertiser demand
- Other
- Disconnected or siloed audience data
- Privacy or compliance concerns

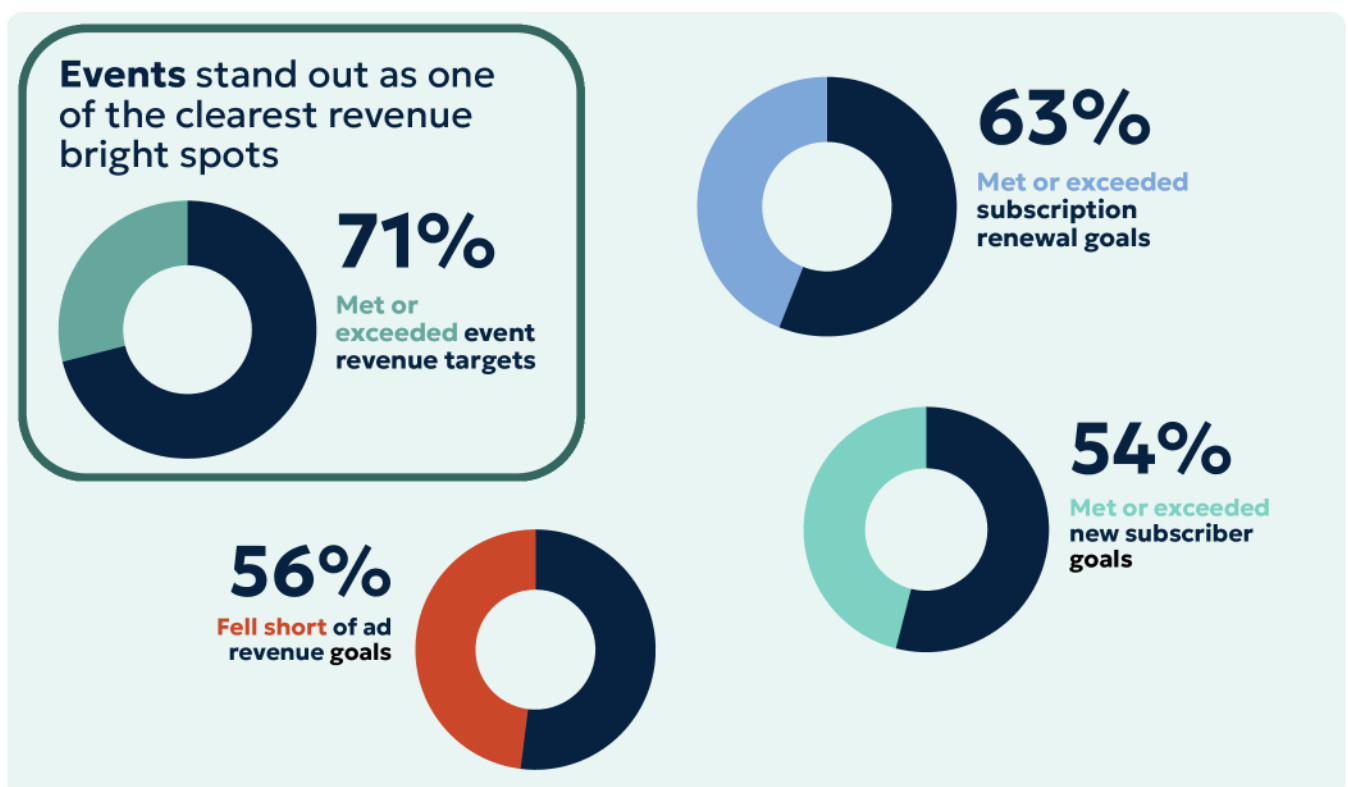
Audience budgets are leaning toward control, retention, and efficiency.



The challenge is not awareness. Most organizations understand that audience quality, audience behavior, and audience intent have revenue value. **The issue is whether those signals are being used in a disciplined, repeatable way inside commercial workflows.**

Performance against business targets reinforces that point. Among respondents with applicable targets, 54% met or exceeded new-subscriber goals over the past year. Sixty-three percent met or exceeded subscription-renewal goals. Growth in total owned audience also looks relatively steady, with 56% meeting or beating targets. Subscription revenue is closer to even, with 53% meeting or exceeding goals and 47% falling short.

Advertising is the weakest major revenue line in the survey. Among respondents with applicable targets, 56% fell short of ad revenue goals, while 44% met or exceeded them. **Events and experiences stand out as the clearest bright spot.** Seventy-one percent of respondents with applicable event revenue targets met or exceeded those goals, compared with 29% who fell short. That pattern is consistent with last year's report, which also showed advertising under pressure while events held up better. This year's results make the contrast sharper. Across both editions, **revenue tied more directly to audience relationships and differentiated experiences appears more resilient than ad revenue alone.**



A consistent pattern emerges from those results. **Revenue tied to direct audience relationships, loyalty, and differentiated experiences appears more resilient** in this sample than revenue tied to advertising alone.

That does not reduce the importance of ad revenue. For many publishers, advertising remains a major part of the model. Still, the data suggests it is becoming less dependable as a stand-alone growth engine. Renewals, owned audience growth, and events are carrying more of the weight.

Ecommerce remains a limited opportunity for most organizations in this sample. More than three-quarters of respondents marked ecommerce or merchandise revenue as not applicable or unknown. For many publishers, the nearer-term opportunity is not adding more unrelated business lines. It is getting more value from audience relationships they already own.

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Events are outperforming many other revenue lines, **with 71% of applicable respondents meeting or exceeding event revenue goals.**



AI

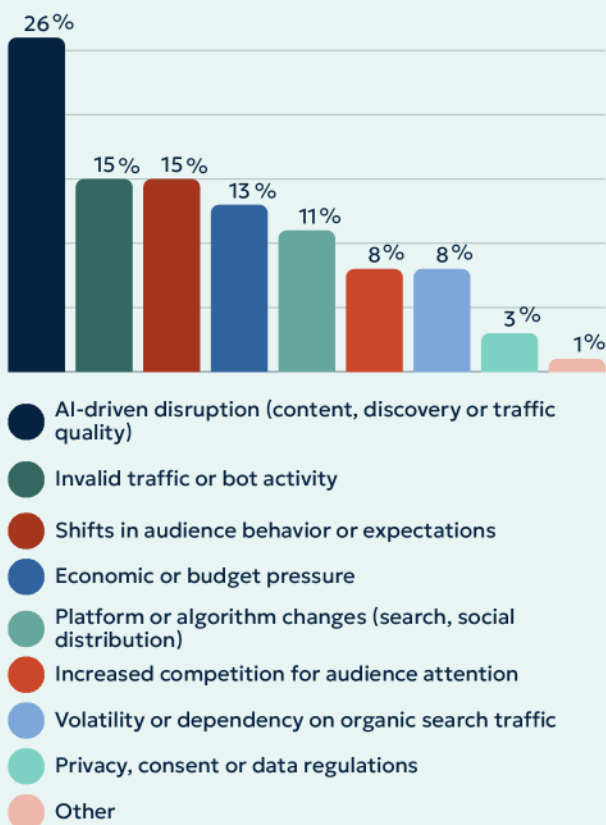
Now a discovery problem, a measurement problem, and a strategic problem

AI has moved from broad industry backdrop to direct audience concern. When respondents were asked to name the biggest external threat to their audience strategy, AI-driven disruption around content, discovery, or traffic quality ranked first at 26%. That placed it ahead of invalid traffic or bot activity at 15%, shifts in audience behavior or expectations at 15%, economic or budget pressure at 13%, platform or algorithm changes (search, social distribution) at 11%, increased competition for audience attention at 8%, volatility or dependency on organic search traffic at 8%, privacy, consent or data regulations at 3%, and other at 1%.

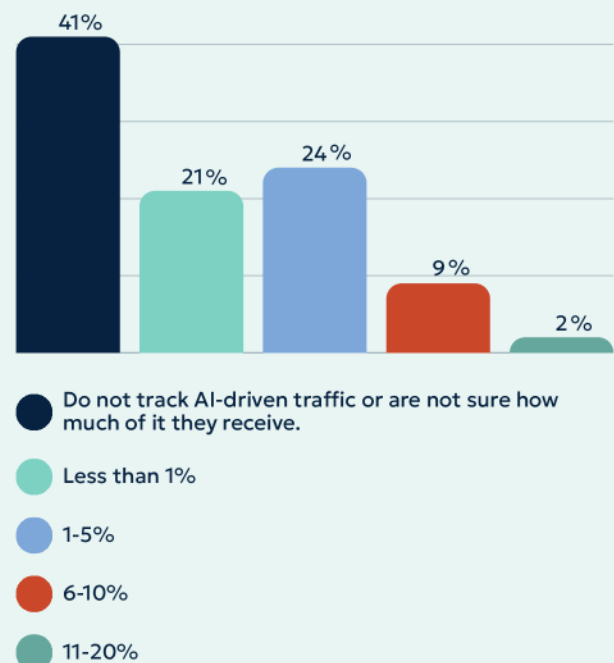
The ranking matters on its own. The next finding makes it more urgent. Forty-one percent of respondents say they either do not track AI-driven traffic or are not sure how much of it they receive. Another 21% estimate that AI currently drives less than 1% of their site traffic. Twenty-four percent put it in the 1% to 5% range. Only a small minority report AI-driven traffic above 5%.

That suggests the immediate issue is not volume alone. It is visibility.

What's the biggest external threat to your audience strategy right now?



Approximately what percentage of your site's total traffic currently comes from AI-driven sources (e.g., ChatGPT, Perplexity, AI-powered search results)?



AI is already changing how audiences discover information, compare sources, and decide whether to click through. Yet many organizations still lack a clear view of what those shifts mean inside their own traffic and engagement data. That leaves teams in a familiar position: dealing with a real distribution change before measurement and reporting are in place.

The risk extends beyond referral traffic. AI also raises harder questions about content visibility, visit quality, subscriber intent, and how much value publishers retain when their work is summarized or mediated elsewhere.

For media organizations that depend on repeat visitation, conversion, or advertiser trust, this is not a niche concern. It affects how leaders think about discovery, audience quality, and direct relationship strategy.

The publishers best positioned for 2026 are unlikely to be those with the highest raw AI referral numbers today. **A stronger position belongs to teams with a clearer view of what AI-driven discovery means for engagement, conversion, and long-term audience value.** In practical terms, that means more consistent referral tracking, sharper separation of high-intent traffic from low-value visits, and continued investment in owned channels that reduce dependence on intermediated discovery.

“

AI is already a strategic audience concern, even though many teams still are not measuring AI-driven traffic.

Final Thoughts

The next gains will come from cleaner execution.



The 2026 audience picture is not one of retreat. It is one of sharper priorities.

Budget conditions are still tight. Many teams are being asked to deliver better audience outcomes without a major increase in resources. That part is not new. What is clearer now is where leaders believe the work needs to happen. Known audience matters. Retention matters. Better data quality matters. Cleaner systems matter. Faster execution matters.

In other words, **media companies are not lacking for direction. They are being tested on follow-through.**

From Omeda's point of view, this is the most important takeaway in the report.

Media is still a relationship business.

Content and audience are still media's most important assets. Not reach in isolation. Not traffic spikes that disappear as quickly as they arrive. Real audience trust built over time with the people who return to your brand, engage with it, and create value across subscriptions, events, data, and advertising.

That is why this year's findings matter.

The strongest publishers are not treating audience strategy as a side function or a reporting layer. They are treating it as part of the business model itself.

They understand that audience data only becomes valuable when it helps the company make better decisions. They understand that publisher-controlled channels matter because they strengthen audience access, not only distribution efficiency. They understand that retention deserves more attention because durable audience value is worth more than one-time transactions.

This is also why fragmentation has become such a serious issue. Disconnected systems, manual workarounds, and unclear ownership do not only create operational headaches. They weaken the business. They slow response time. They make it harder to see what is working. They make it harder to act on audience insight across product, marketing, sales, subscriptions, and events. In a tighter market, that is not a minor inefficiency. It is a competitive problem.

The same is true of monetization. Advertising still matters. It will continue to matter. But the results in this year's survey suggest that **publishers are on firmer ground when revenue is tied more directly to loyalty, engagement, and differentiated experiences.** That should not be read as a call to abandon ad revenue. It should be read as a reminder that the value of audience is broader, deeper, and more durable than any single revenue line.

The AI findings fit into that same pattern. Discovery is shifting again. Distribution is getting less predictable again. Publishers do not control every channel where audiences find information, and they never fully will. That is exactly why audience access matters so much. When markets shift, the companies in the strongest position are the ones that know their audience, can reach them consistently, and can act on what they know without waiting for a platform to cooperate.

This is why 2026 looks like a year of essential operating decisions.

The next phase of growth in media will not come from trying to be everything to everyone.

It will come from serving the right audiences well, reducing the friction that keeps teams from acting on insight, and creating a more connected audience strategy across the business.

**Mass media is not disappearing.
Meaningful media is rising.**

The publishers that pull ahead will be the ones that know who they serve, earn trust over time, and organize their teams and systems around audience value. In a market where attention shifts fast and pressure on revenue remains constant, that is not a defensive posture. It is one of the clearest paths to resilience and growth.

Methodology

This survey includes responses from 115 qualified audience, media, and publishing professionals working in media publishing, event, associations organizations. Most serve B2B audiences, and most operate within advertiser-heavy revenue models. Not every respondent answered every question, so percentages throughout the report reflect the response base for each individual question.





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About Omeda

Omeda helps organizations manage, activate, and grow their audiences in one platform. Built for businesses where content and experiences are the product, Omeda unifies first-party audience data, powers content-driven engagement, and helps maximize audience lifetime value across subscriptions, newsletters, advertising, events, and memberships. By bringing data, automation, and analytics together, Omeda enables teams to understand audience behavior and turn everyday interactions into long-term relationships and sustainable revenue.

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