Why Capital Is Fleeing AdTech at Precisely the Wrong Moment

Last year, technology absorbed roughly 30 percent of global private equity deployment by value. In the first quarter of 2026, according to EY, that share collapsed to just over 10 percent. The capital did not disappear and the belief about where the world is heading did not change. The people who allocate the money looked at the speed of AI driven disruption and decided they could not underwrite it.

I see it every week. Walk into almost any room of investors and strategic buyers in marketing, advertising, and media and you will hear the same thing: The old platforms have to be reinvented.

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