MEDIA TRENDS 2026

AUDIO

AI SEARCH

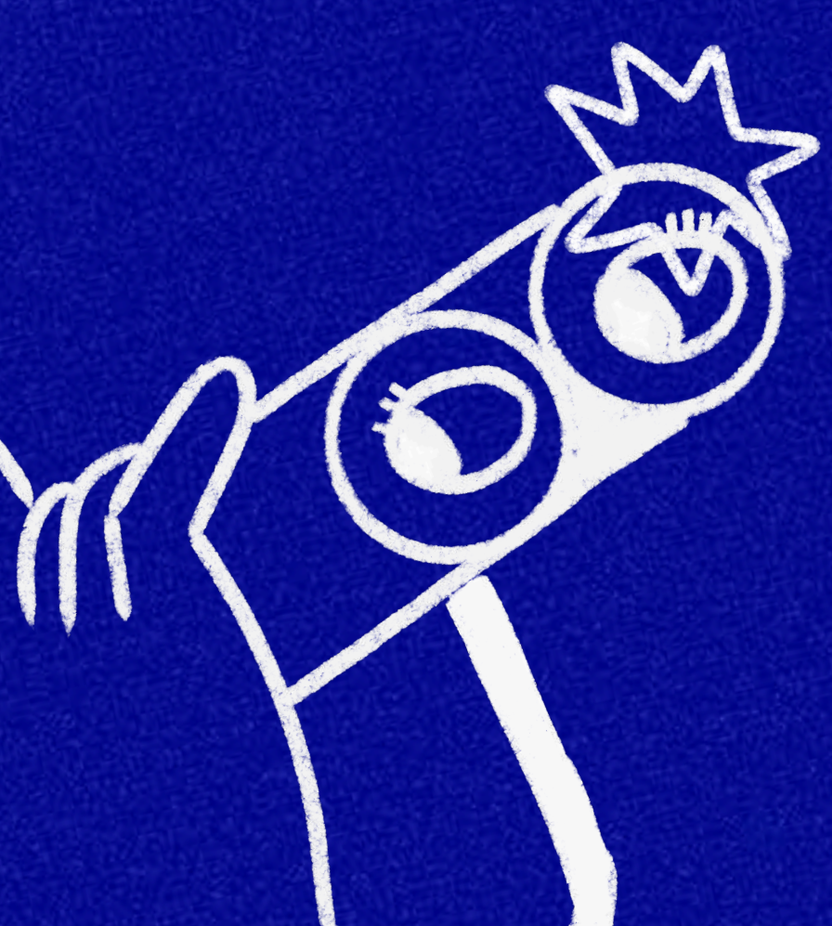
VOICE OPTIMIZATION

PODCASTS

RETAIL MEDIA

TRASPARENCY

DATA



PUBLISHED BY
AIDIGITAL

EXECUTIVE SUMMARY

Three gatekeepers now control who succeeds in advertising:

- **AI decides who gets seen**
- **Credibility determines who gets trusted**
- **Premium channels dictate who drives measurable impact.**

THESE AREN'T ISOLATED TRENDS – THEY'RE INTERCONNECTED FORCES DEMANDING ADVERTISERS RETHINK PLANNING, MEASUREMENT, AND ACTIVATION FROM THE GROUND UP.

Consider how quickly the ground has shifted: 47% of adults ages 18-35 now watch video podcasts, 88% of U.S. households own at least one Connected TV device, and AI-generated search answers are reducing organic click-through rates by 34-64%. AI Search scaled to $1 billion faster than any channel in digital advertising history – reaching in 4 years what took CTV a decade. These aren't predictions. They're current realities reshaping visibility, measurement, and conversion paths.

Yet most advertisers are optimizing for a world that no longer exists. Nearly 60% of marketing budgets now flow to performance marketing, with a quarter of marketers increasing that proportion year-over-year. This short-term focus has consequences: brands underinvesting in brand building see 30% lower long-term ROAS, diminished pricing power, and eroding customer loyalty. The industry is optimizing itself into irrelevance.

A counter-movement is emerging. Sophisticated marketers are leveraging AI to revolutionize campaign efficiency, investing in retail media networks approaching $69B with full-funnel capabilities, and entering audio, voice, and CTV before saturation. The most effective strategies balance immediate performance with long-term brand building, using premium environments and first-party data to create lasting competitive moats. For marketers willing to move beyond cheap reach, 2026 offers a clear window to differentiate through quality, precision, and integration.

THIS REPORT – BUILT ON COMPREHENSIVE ANALYSIS OF INDUSTRY SHIFTS, CONSUMER BEHAVIOR SIGNALS, AND MEDIA CHANNEL EVOLUTION – PROVIDES STRATEGIC GUIDANCE FOR CAPITALIZING ON 2026'S TRANSFORMATION. FROM AI SEARCH REDEFINING THE ZERO-CLICK FUTURE TO CTV BECOMING THE FASTEST-GROWING ATTRIBUTION-READY CHANNEL, EACH TREND IS GROUNDED IN DATA REVEALING BOTH SCALE OF CHANGE AND BUSINESS IMPLICATIONS.

What defines success in 2026?
Advertisers who thrive do three things their competitors won't:

- **They optimize for AI, not algorithms.**
- **They treat credibility as infrastructure, not messaging.**
- **They enter emerging channels early.**

The smartest investments recognize that where you appear, how you close attribution loops, and whether you've created bandwidth for strategic thinking now determines competitive advantage for years ahead.

IN 2026, YOUR COMPETITORS WILL ASK: "HOW MUCH SHOULD WE SPEND?"
WINNERS WILL ASK: "WHERE SHOULD WE BE THAT OUR COMPETITORS AREN'T"

WHICH QUESTION WILL DEFINE YOUR STRATEGY AND YOUR RESULTS?

CONTENTS

TREND 01
TREND 02
TREND 03

AI - FROM TOOL TO OPERATING SYSTEM

AI Search is Redefining the Digital Growth Curve
AI Media Moves from Manual to Self-Optimizing
The Next Frontier – Voice as the Core of the Multimodal Ecosystem

TREND 04
TREND 05
TREND 06

THE CREDIBILITY ECONOMY

The Transparent Media Mandate
The Power of 1P Data
The Push for Privacy

THE NEXT-GEN MEDIA MIX

TREND 07
TREND 08
TREND 09
TREND 10

Entering the Consolidation Era of AdTech
CTV is the New Black
The Walled Garden Era Shifts from Programmatic to Retail Media
Audio + Podcasts – From Background Noise to Untapped Prime Media

Key takeaways & solutions
Conclusions
About AI Digital



TREND 01

AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

TREND 01:
AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

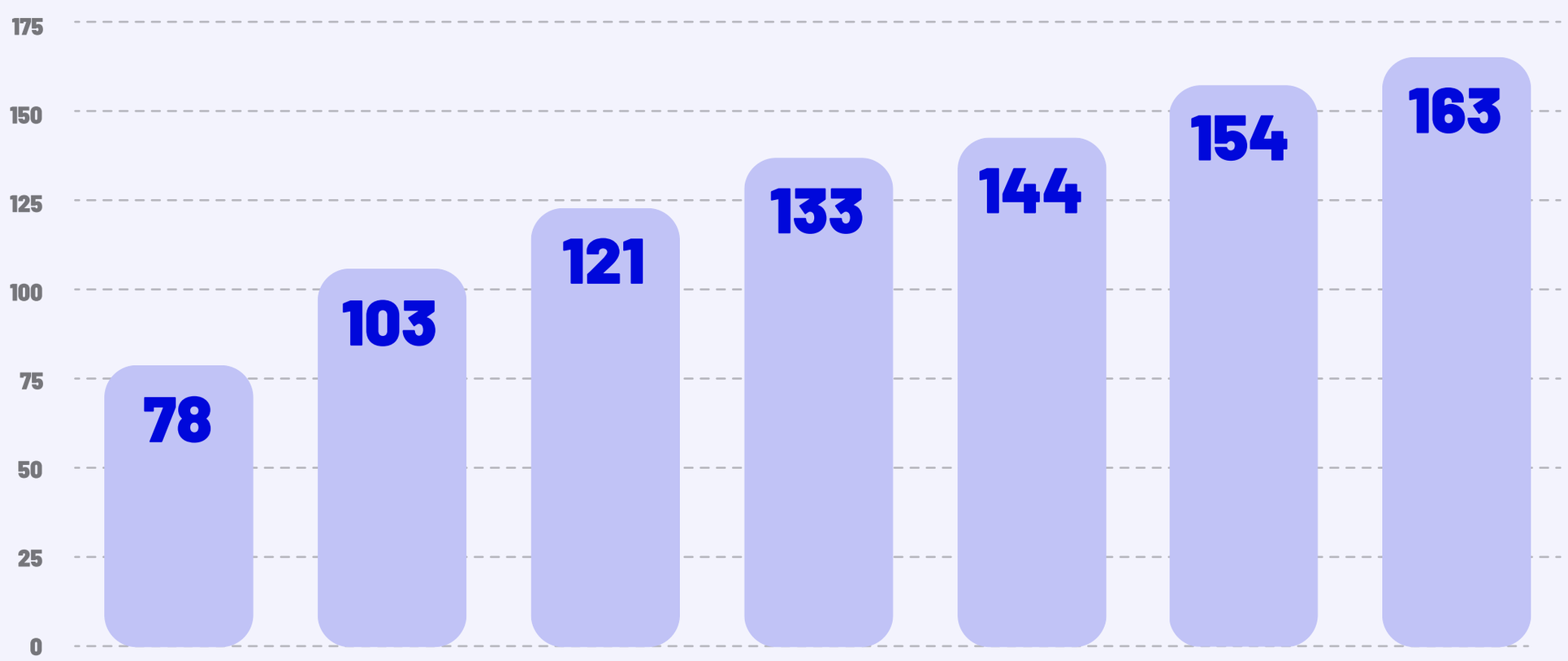
REDEFINING WHERE AND HOW CONSUMERS CONVERT

AI Search is scaling faster than any previous wave of digital advertising, surpassing retail media and connected TV within just four years of reaching $1 billion spend. At the same time, over **half of internet users will be Gen-AI users by 2029.**

As AI platforms deliver direct, answer-based results, traditional lower-funnel tactics like search and retargeting will face declining visibility, making upper-funnel awareness and contextual strategies more essential than ever.

Source

Years after reaching $1 billion



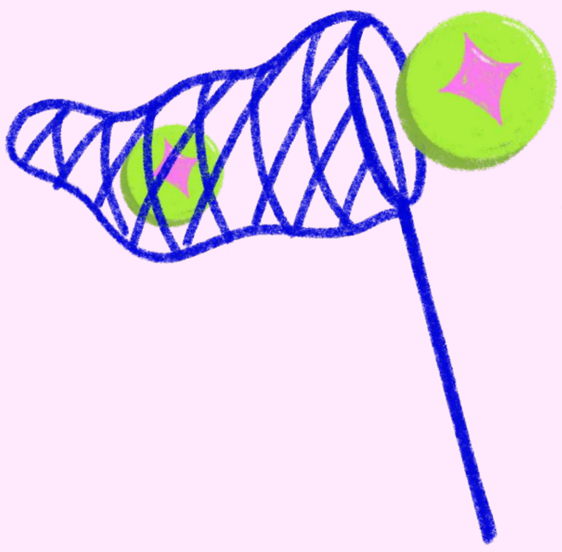
	2023	2024	2025	2026	2027	2028	2029
% CHANGE	895%	32%	17%	10%	8%	7%	6%
% OF GEN-AI USERS	26%	34%	39%	43%	46%	49%	51%

TREND 01:
AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

AI SEARCH IS ACCELERATING

Driven by younger users and marked by skepticism

RAPID SPEND SHIFT TOWARD AI SEARCH



AI search spend set to grow from **$1B in 2025** to **$26B by 2029**, representing nearly 14% of all U.S. search advertising, a clear signal that budgets are beginning to follow changing consumer behavior.

Source: eMarketer, 2025

POWERED BY YOUNG EDUCATED COHORTS



Nearly **6 in 10 adults** under 30 have used ChatGPT, and post-graduates interact with AI multiple times a day, making younger, educated users the primary drivers of early AI-search adoption.

Source: Pew, 2025

HOWEVER TRUST REMAINS LIMITED



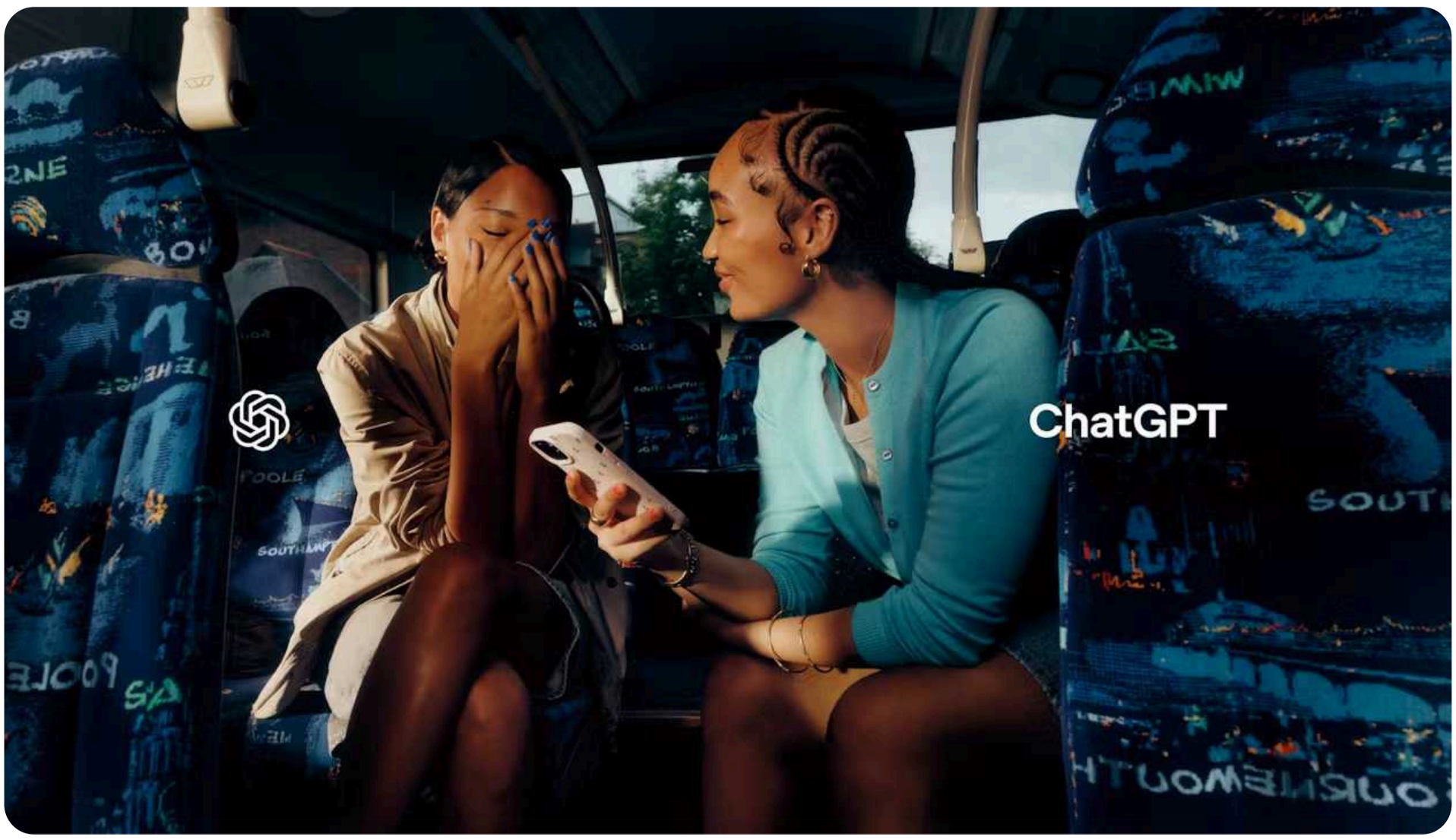
66% of U.S. adults worry about inaccurate information from AI, and fewer than **1 in 5** find AI summaries highly useful, showing that rapid adoption is still tempered by low trust.

Source: Pew, 2025

TREND 01:
AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

CURRENT & EMERGING FORMATS

Experimental phase with expanding opportunities



CHALLENGES	FORMATS
SPARSE INVENTORY, UNCLEAR PRICING, LIMITED ATTRIBUTION	**SPONSORED ANSWERS** Contextual brand mentions appear inside AI responses, labeled but designed to blend natively into the conversation. Copilot perplexity
PAID UNITS RISK BIASING AI ANSWERS, IMPACTING TRUST	**AI OVERVIEWS & SHOWROOM ADS** Google is embedding shoppable units within AI Overviews; Microsoft is piloting Showroom Ads and DeepGen creative extensions. Google Microsoft
PAID UNITS RISK BIASING AI ANSWERS, IMPACTING TRUST	**CHATGPT ADS (LAUNCHING 2026)** OpenAI plans a large-scale rollout of ads within ChatGPT's interface, enabling conversational product placements and affiliate integrations. OpenAI

TREND 01:
AI SEARCH IS REDEFINING
THE DIGITAL GROWTH CURVE

SHIFTING USER BEHAVIORS ARE RESTRUCTURING HOW DECISIONS ARE MADE

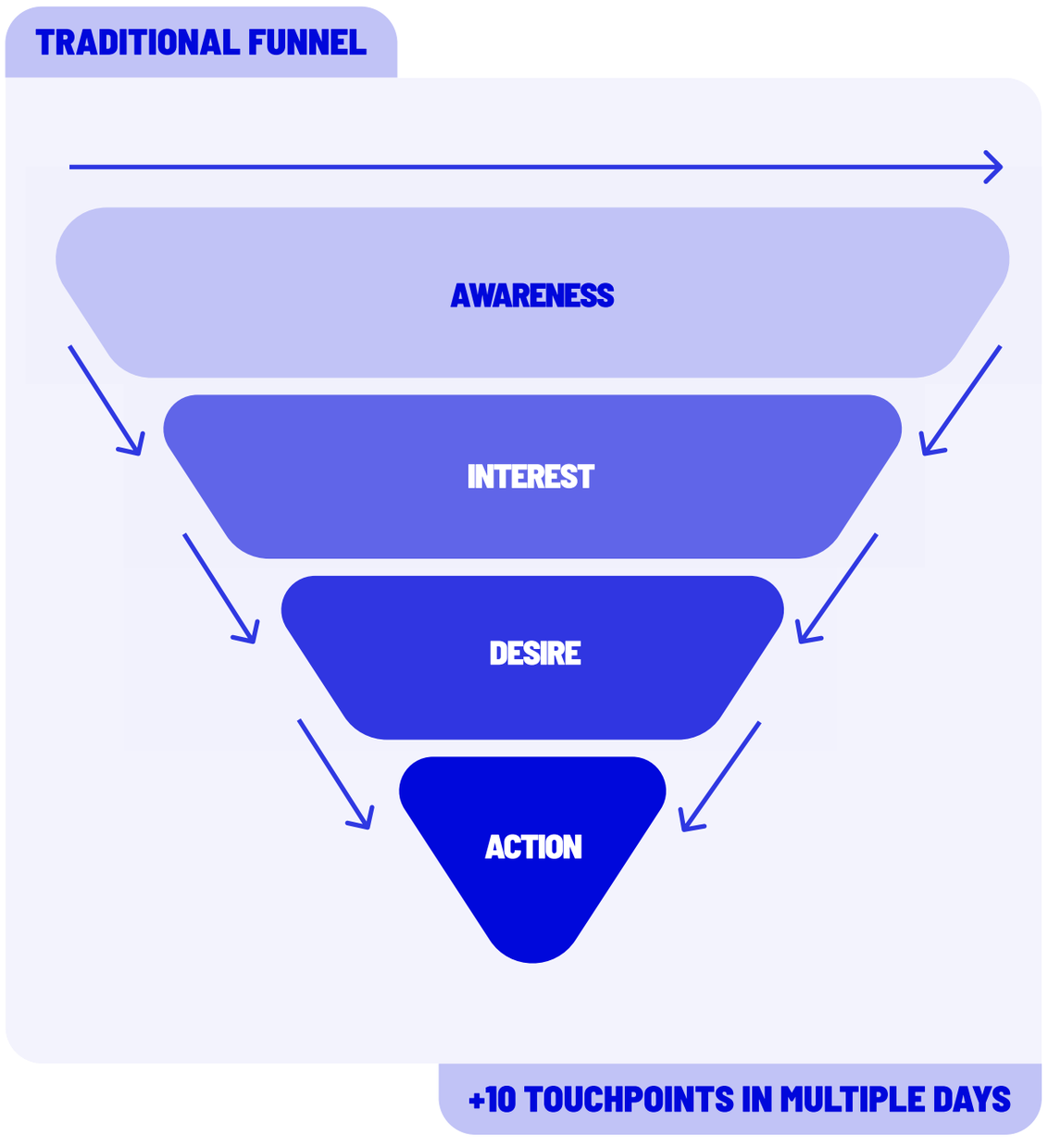
From multi-touch nurturing to instant conversion inside one conversation

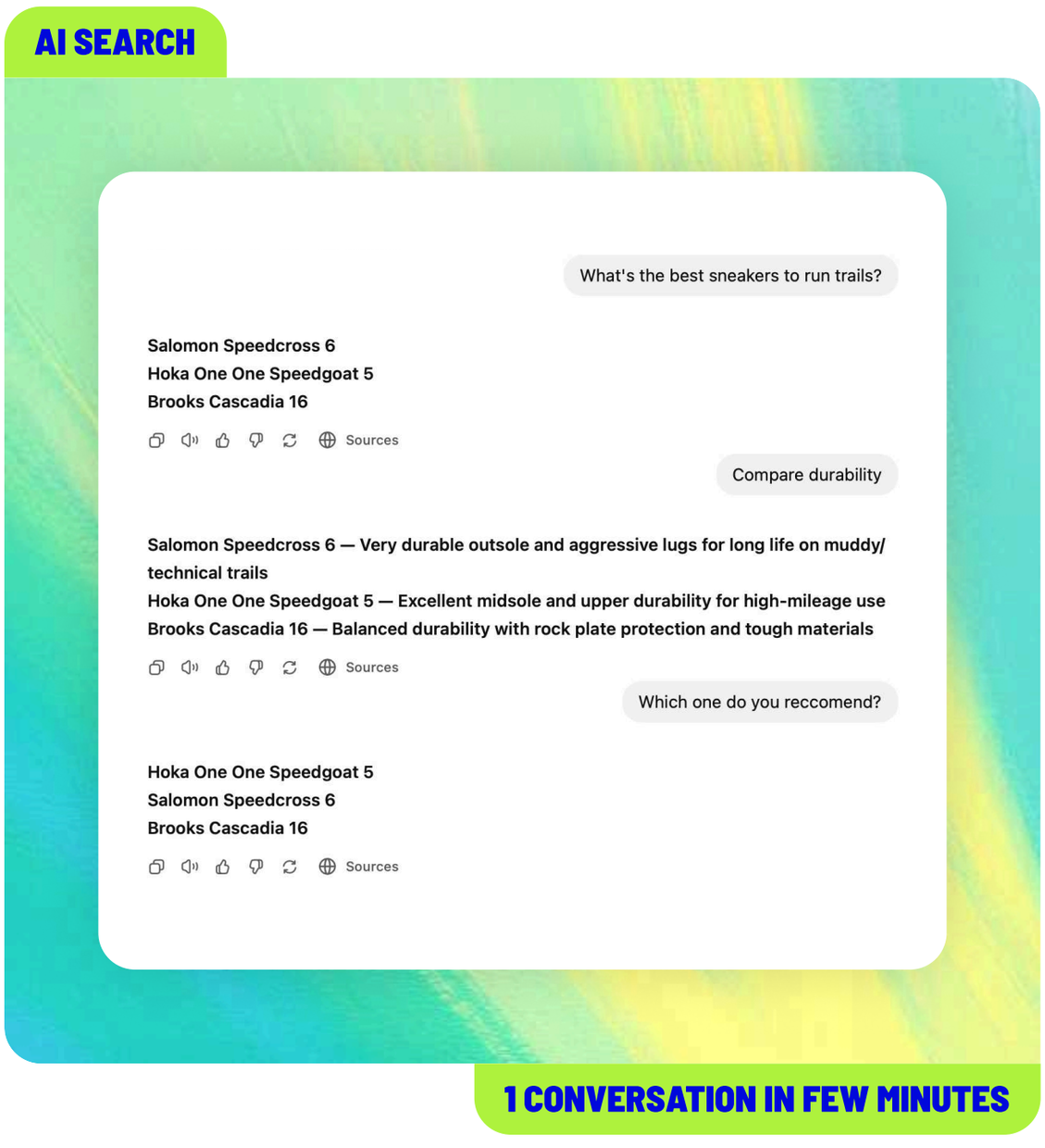
For marketers, this means:

No more funnel warm-up
If your brand isn't surfaced in that AI response, you're out of the consideration set.

Trust and structure win
Content credibility, data clarity, and contextual cues determine if and how your brand appears.

Speed matters
What used to take days now happens in minutes, requiring proactive visibility rather than reactive optimization.

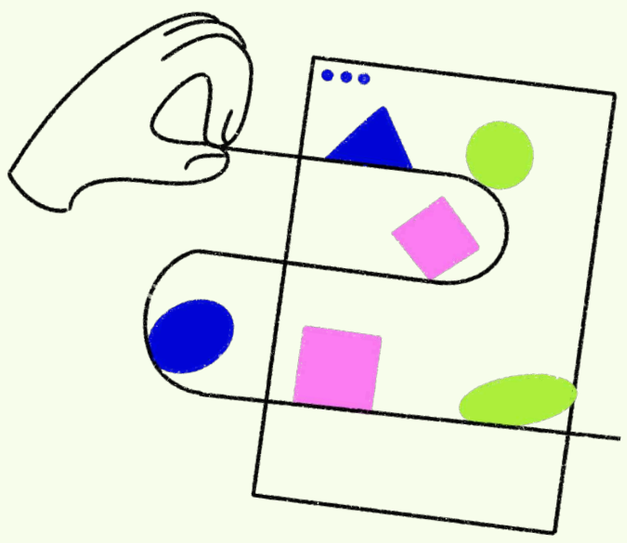




TREND 01:
AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

POTENTIAL IMPLICATIONS FOR THE OPEN WEB

DECLINE IN TRADITIONAL WEB ENGAGEMENT



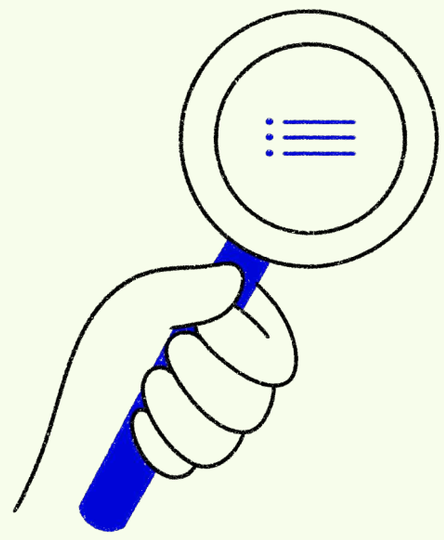
When AI-generated answers appear, organic CTRs drop 34–64%, cutting publisher traffic dramatically.

Users increasingly complete their journeys within AI interfaces, never visiting original sites.

Publishers face an “answer-layer” challenge, where visibility no longer guarantees web visits.

Source

THE ZERO-CLICK FUTURE: SEARCH WITHOUT SESSIONS



AI search engines increasingly deliver direct answers, bypassing referral links and ad units.

Discovery now happens inside conversation threads, making web sessions shorter and rarer.

“Share-of-Answer” replaces pageviews as a key performance metric for visibility tracking.

Source

EMERGING PUBLISHER & BRAND RESPONSES



Structured data feeds (schema, product metadata, FAQs) ensure brands remain legible to AI crawlers.

Pay-per-crawl models are being tested to monetize AI’s use of publisher data (e.g., Reddit, Stack Overflow).

API access walls are rising. Major media outlets and platforms now restrict AI scraping without compensation.

Source

TREND 01:
AI SEARCH IS REDEFINING THE DIGITAL GROWTH CURVE

2026 AI SEARCH READINESS: PROTECTING & EXPANDING BRAND VISIBILITY IN AN AI-FIRST DISCOVERY ERA

Discovery is rapidly shifting from SEO ranking to AI-driven answers, and brands that do not adapt will lose visibility.

WHAT DOES IT MEAN FOR BRANDS?

Audit
Assess how they appear across AI engines and identify early gaps in visibility or representation.

Reassess
Evaluate lower-funnel efficiency as AI shifts discovery paths and increases the importance of trust-building signals.

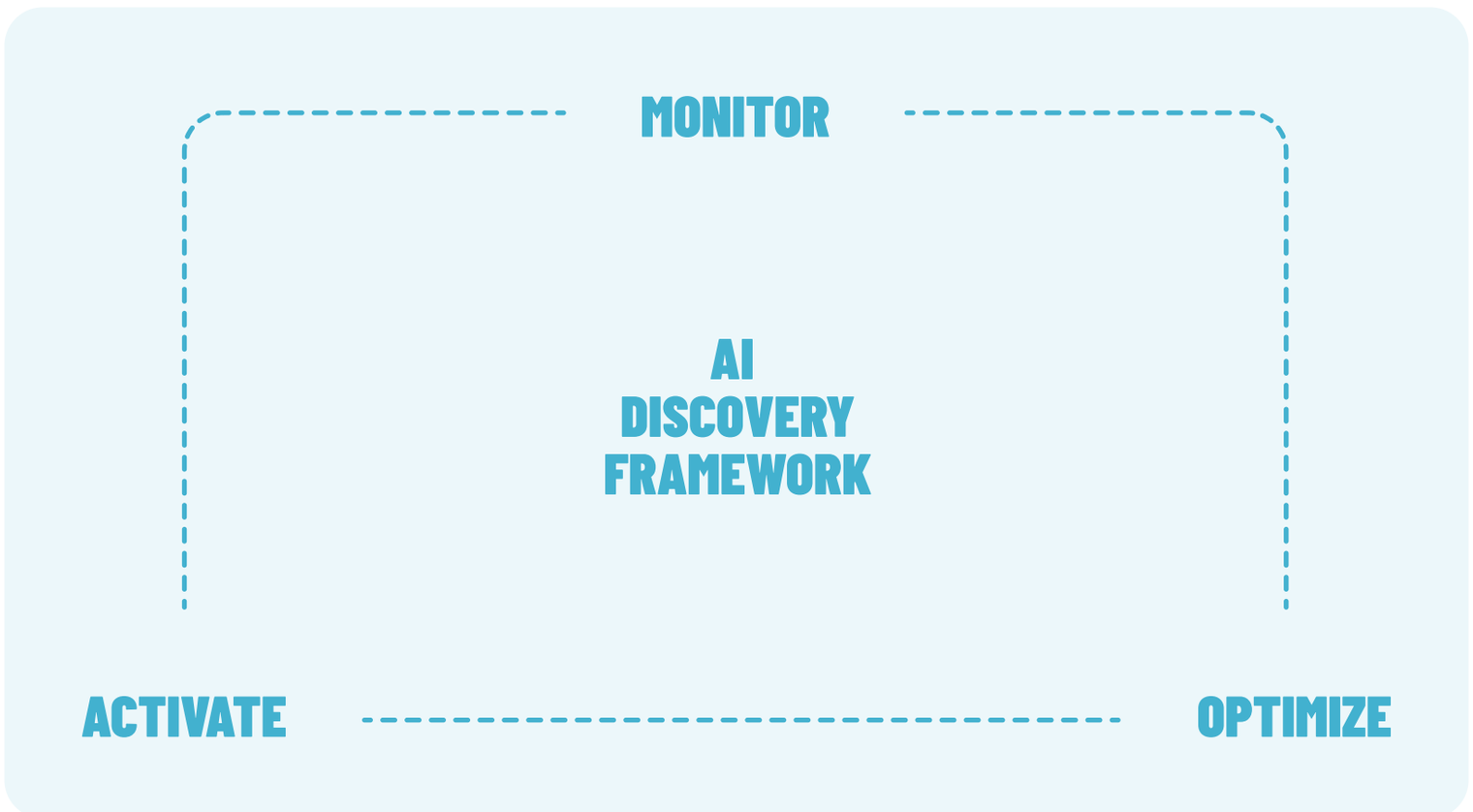
Measure
Adopt attention and brand-lift metrics that move beyond last-click to capture real visibility and impact in AI-driven journeys.

WHAT DOES IT MEAN FOR MARKETERS?

Monitor
Find where your brand is missing or misrepresented in AI engines and close those gaps early.

Optimize
Strengthen structured, verifiable brand signals that AI models rely on for ranking and recommendations.

Activate
Use attention-rich media to boost credibility and increase your chances of being surfaced in AI-driven conversations.



TREND 02

AI MEDIA MOVES FROM MANUAL TO SELF-OPTIMIZING

TREND 02:
AI MEDIA MOVES FROM MANUAL TO SELF-OPTIMIZING

AI MEDIA MOVES FROM MANUAL TO SELF OPTIMIZING

Automation is now the operating system for main channels, and we are at the crossover. We are moving from humans with tools to AI with human oversight, and teams that do not adapt will be outpaced and undercut by AI native competitors.

SELF OPTIMIZING ECOSYSTEMS

Campaigns auto adjust budgets, audiences, and placements in real time using predictive signals.

2.9x higher performance
26% higher ROI
35% peak conversion lift

REAL TIME CREATIVE OPTIMIZATION

DCO personalizes and tests creative on the fly to lift engagement and conversions.

31% higher ROAS
50% lower CPA
85% video completion

PREDICTIVE CAMPAIGN INTELLIGENCE

Models forecast demand and outcomes so spend moves proactively, not reactively.

25% higher engagement
15% less wasted spend
6x more likely profitable

AUTONOMOUS BID MANAGEMENT

Algorithms set and reset bids to lower CPA and grow ROAS across channels.

18% more conversions
12% lower CPA
95%+ of target ROAS hit

HYPER AUTOMATION OF WORKFLOWS

End to end automation links data, orchestration, and reporting to cut manual work.

30% lower operating costs
14.8 hours Saved per week
$5k USD Monthly Value

AUTONOMOUS MARKETING AGENTS

AI agents run multi step marketing tasks and make strategic tweaks with minimal oversight.

40% apps with agents by 2026
187% ROAS in case studies
34% spend waste without full autonomy

TREND 02:
AI MEDIA MOVES FROM MANUAL TO SELF-OPTIMIZING

AI AUTOMATION ALREADY DRIVES SUPERIOR OUTCOMES

Platforms now optimize in real time, the edge comes from goals, signals, creative velocity, and decision speed.

Predictive Analytics
Turns planning into a continuous loop and makes decisions faster, improving campaign effectiveness.

Real time optimizations and personalization
Dynamic budget shifts and tailored experiences increase conversions and keep customers engaged.

Agile, data driven operations
Teams that pivot quickly on live signals consistently outperform and generate stronger profitability.

2.9x
higher performance with predictive analytics

26%
higher ROI for teams optimizing in real time

73%
faster decision making

35%
higher conversion rates during peak seasons

Source: Forrester, RoboticMarketer

TREND 02:
AI MEDIA MOVES FROM MANUAL TO SELF-OPTIMIZING

BIG PLATFORMS ARE NOW AI FIRST

AI runs the auctions, people set the rules. As platforms consolidate inventory and optimization, value shifts to goals, signals, and creative systems, not manual tweaks.

What Changed?

Search & Shopping
Unified automation for inventory and optimization using value based bidding, data driven attribution, and auto assets.

Social & Short Form Video
Automation standardizes audience, placement, and rotation while models test variants in flight and surface winners.

Retail Media Networks
AI bidding across sponsored and display with bid modifier APIs, commerce signals build audiences and enable closed loop reporting.

Open Web Programmatic
Goal based bidding and pacing across DSPs, supply path optimization and attention signals manage frequency and duplication.

SCALE & MOMENTUM

90% display spend is programmatic

80%+ advertisers use automated bidding

76% ecommerce budgets in automation first formats

70%+ automation first social buying growth YoY

CONSUMER IMPACT

71% expect personalization

81% ignore irrelevant ads

30% viewable ads actually seen

3s+ video boosts recall

TREND 02:
AI MEDIA MOVES FROM MANUAL TO SELF-OPTIMIZING

AI MEDIA MOVES FROM MANUAL TO SELF OPTIMIZING

	BEFORE	NOW WITH AI AUTOMATION
PLANNING & EXPERIMENTATION	Annual plans, fixed channel splits, one off tests with slow decisions	Continuous predictive planning. Budget fluidity. Always on experiments, fast time to decision, rollout rules that promote winners.
DATA & MEASUREMENT	Rented third party segments, basic lookalikes, last click dashboards, lagging post mortems	First-party ID spine with clean events and feeds. Closed loop to revenue CLV and new to brand. Incrementality and model lift tracked and refreshed regularly.
CREATIVE	Few assets built quarterly, manual swaps, one message for all, limited testing	Template-driven DCO with weekly refresh. Variants tied to product, audience, and context. Clear rules to scale winners automatically.
ACTIVATION & OPERATIONS	Manual bids and line-item tweaks, hand pacing and checklist QA, Channel silos	Humans set goals and guardrails, algorithms execute. Cross-channel automation for bidding and pacing. Automated QA with alerts and audit trail plus human override.

TREND 03

THE NEXT FRONTIER – VOICE AS THE CORE OF THE MULTIMODAL ECOSYSTEM

TREND 03:
THE NEXT FRONTIER – VOICE AS THE CORE OF THE MULTIMODAL ECOSYSTEM

VOICE AS THE CORE OF THE MULTIMODAL ECOSYSTEM

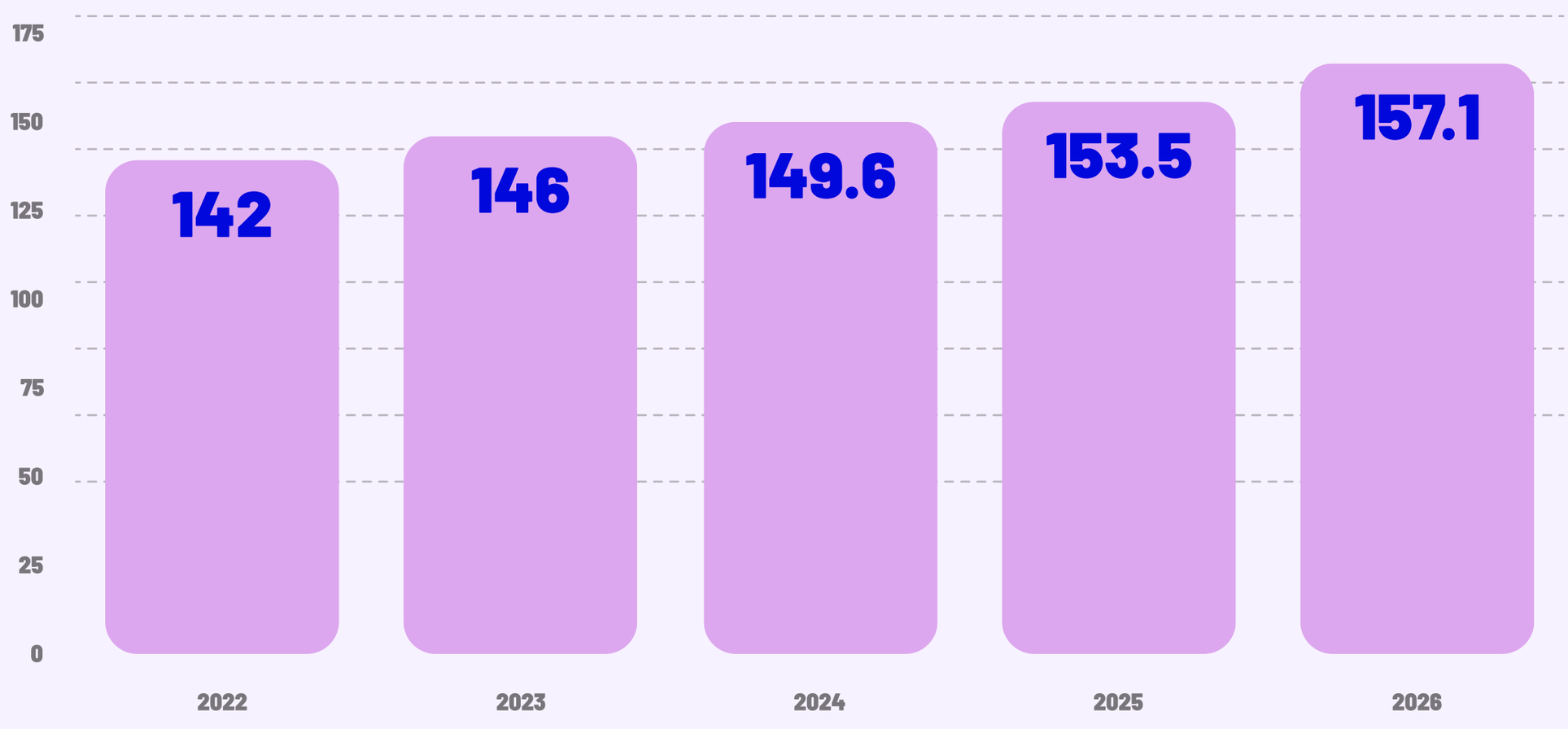
In 2026, voice technology and Gen-AI are converging into a single, multimodal ecosystem, where discovery, dialogue, and decision-making happen in real time.
Voice assistants are becoming the primary gatekeepers of information, leading to a mandatory shift from passive, click-based interruption to active, consumer-initiated conversation.

U.S. voice-assistant users will reach over 157 million in 2026

Major platforms are embedding Gen-AI: Apple (Siri AI upgrade 2026), Amazon (Alexa + Gen-AI features), Google (Gemini voice mode)

Voice adoption is scaling steadily, not fading. Each year adds millions of new users and more discovery moments for brands to capture.

VOICE ASSISTANT USERS IN THE U.S. (IN MILLIONS)



Source

TREND 03:
THE NEXT FRONTIER –
VOICE AS THE CORE OF THE
MULTIMODAL ECOSYSTEM

TRENDS AND OPPORTUNITIES

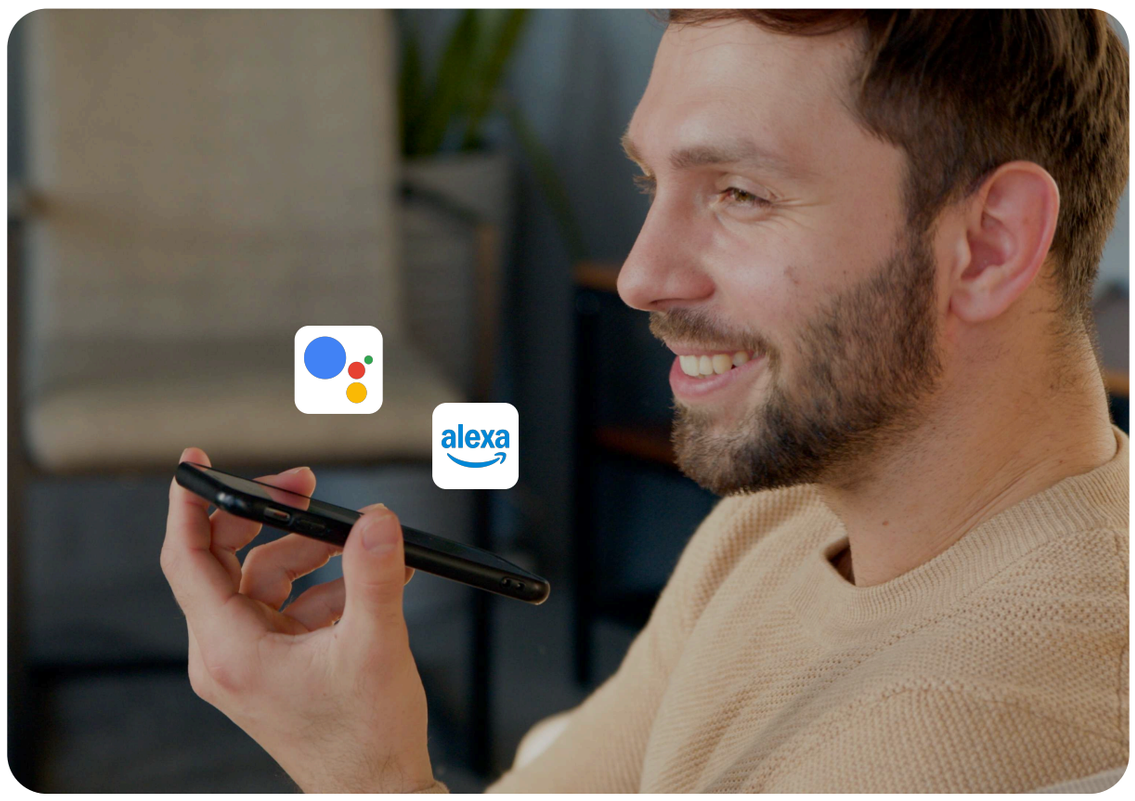
VOICE AND MULTIMODAL EFFICIENCY

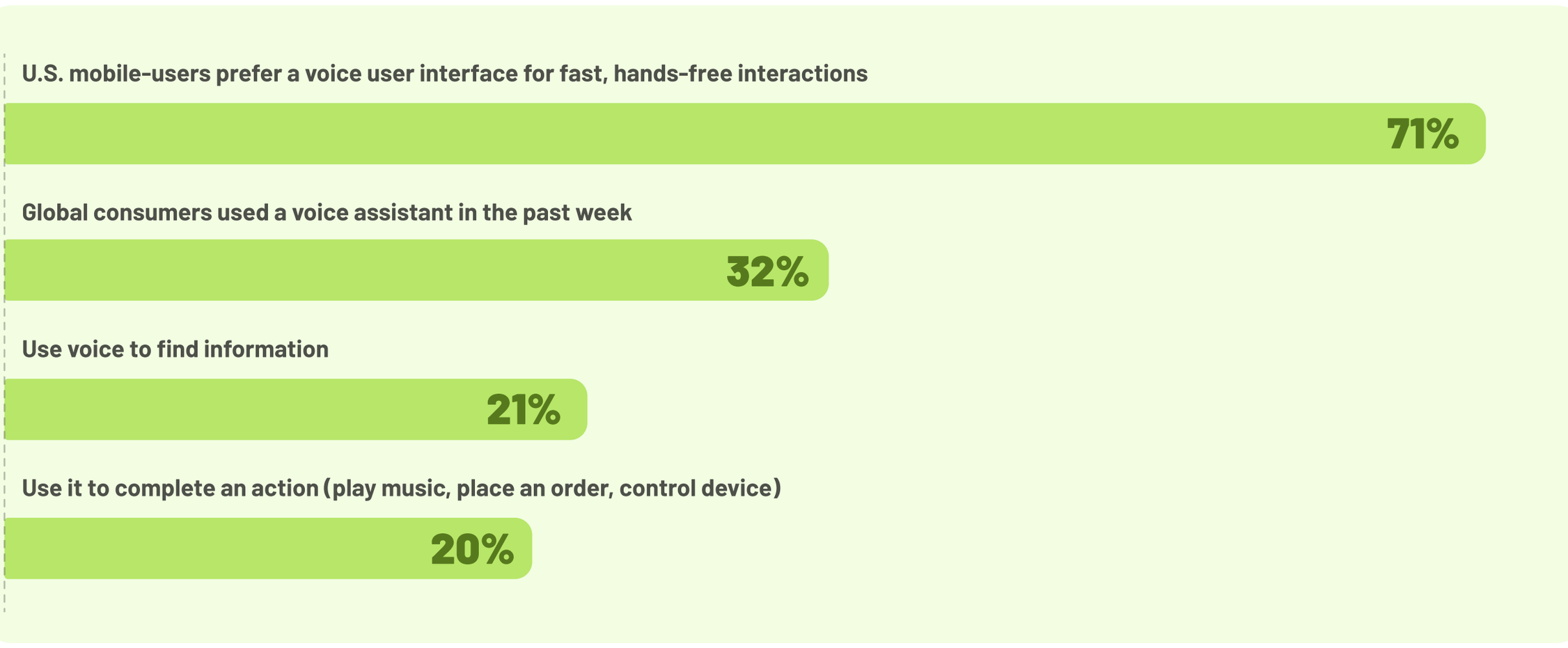
- Voice-led and conversational interfaces are reshaping how discovery and decision moments occur.
- As Gen-AI personalizes each touchpoint, voice becomes the connective tissue that keeps campaigns “always active” across devices.
- By 2026, a substantial share of brand–consumer interactions will run via voice or AI-agent surfaces.

WHAT TO PRIORITIZE FOR 2026

- Current Voice Readiness: Assess content for voice search optimization and conversational query compatibility
- Multimodal Integration: Develop campaigns combining voice, visual, and text touchpoints
- AI Voice Partnerships: Co-develop brand agents or voice skills with major ecosystems (Google, Amazon).

Source





Source

TREND 03:
THE NEXT FRONTIER –
VOICE AS THE CORE OF THE
MULTIMODAL ECOSYSTEM

VOICE ADS BREAK OUT IN 2026 DRIVING HIGH ENGAGEMENT & ROI

As smart speaker adoption nears saturation, brands are tapping into voice formats to convert passive listening into measurable results, driving **stronger ROI** through interactive, low-friction experiences.

Voice is gaining traction as a performance channel with measurable ROI. Agencies that integrate voice ads into cross-channel strategies, invest in voice-responsive formats, and align media around real-time engagement will unlock lower acquisition costs and deliver stronger results for their clients in 2026.



HIGHER CONVERSIONS

Blueair's Alexa audio ad campaign saw a **94% higher add-to-cart rate** and a **36% lower cost-per-conversion** compared to its 2024 average, indicating voice ads drove substantially more efficient purchases.

Source

LOWER COSTS

Sony's interactive voice ads delivered **5.8K+ voice-activated add-to-carts** and a **77% lower cost per add-to-cart** than their usual Amazon ad average, demonstrating strong ROI from voice engagement.

Source

STRONG USER RECEPTION

75% of Alexa smart-speaker users find interactive audio ads engaging and **81%** find them helpful.

Source

DEEPER ENGAGEMENT WITH VOICE ADS

A neuro-study found **25% higher brain activity** during smart speaker ads vs. standard audio ads, making brand messages more memorable.

Source

TREND 03:
THE NEXT FRONTIER –
VOICE AS THE CORE OF THE
MULTIMODAL ECOSYSTEM

VOICE COMMERCE EMERGENCE

Voice commerce is a long-term growth driver, but for 2026, it must be viewed strategically as a funnel accelerator for research and habitual transactions.

Global voice-commerce market projected to grow to **186.3B** by 2030 (CAGR 24.6%).

CHALLENGES	USER BEHAVIOR & AGENTIC LINK	STRATEGIC POV FOR 2026
LONG-TERM GROWTH	Contextual brand mentions appear inside AI responses, labeled but designed to blend natively into the conversation.	**SECURE FUTURE SCALE** Brands that establish control of their voice presence now will capitalize on future market expansion.
CURRENT UTILITY FOCUS	Contextual brand mentions appear inside AI responses, labeled but designed to blend natively into the conversation.	**PRIORITIZE UTILITY** Approach voice as a high-performing funnel accelerator for research and habitual transactions
ACTIONABLE COMPLETION	Contextual brand mentions appear inside AI responses, labeled but designed to blend natively into the conversation.	**MANDATE CONVERSATIONAL ENDPOINTS** Replace high-friction landing pages/lead forms with direct conversational actions to leverage the 3-5X conversion uplift
ACTIONABLE COMPLETION	CTV, Audio (Digital/Streaming), and DOOH are uniquely positioned to prompt users to engage via voice	**MEDIA REALLOCATION** Use voice-activated CTAs (e.g., “Ask Alexa about…”) in these ambient channels to initiate agentic campaigns and gain full-funnel attribution.

TREND 04

THE TRANSPARENT MEDIA MANDATE

THE NEW PRICE OF ADTECH CLIENT LOYALTY IS TRANSPARENCY

HOW HAS TRANSPARENT AD BUYING EVOLVED TO DRIVING ROI AND CLIENT LOYALTY?

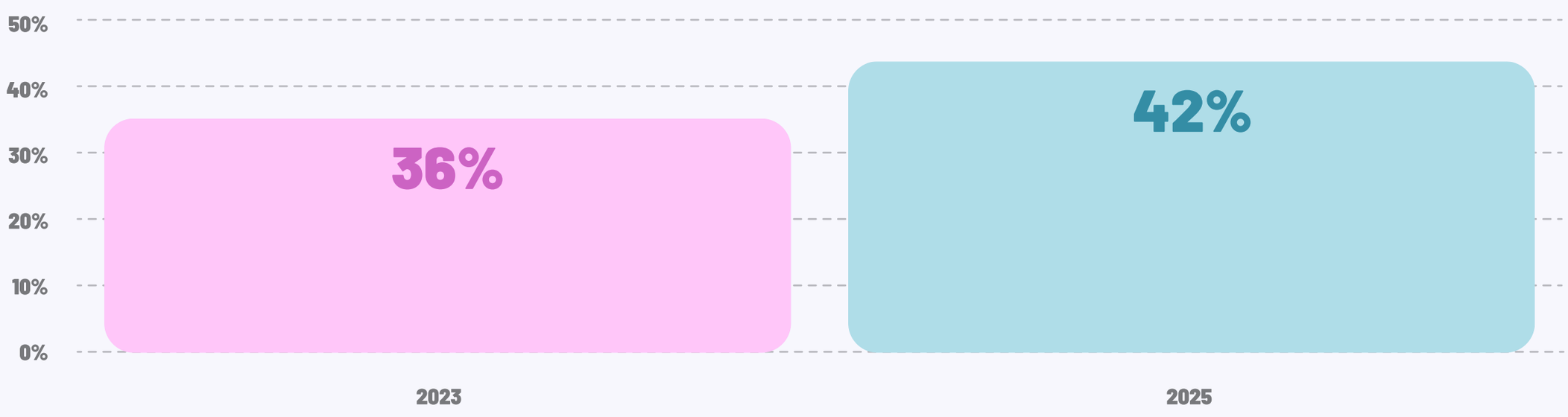
Progress in U.S. Opaque Supply Chains
In 2025, participants in the Association of National Advertisers (ANA) Programmatic Transparency Benchmark directed 41% of their programmatic budgets to effective ad impressions—up from 36% in 2023.

Regulatory Pressures & Industry Shift in the U.S.
U.S. marketers are increasingly demanding impression-level transparency and via third-party verification tools.

Performance Gains Through Transparency
Reports indicate transparent inventory buying improves viewability, ROAS, and client retention — with brands adopting transparency seeing elevated performance.

Log-Level Transparency Becomes Standard
Annual log-level supply-path transparency dashboards will become standard for U.S. programmatic advertising in 2026, ensuring full visibility into media buys and spend.

EFFECTIVE PROGRAMMATIC AD IMPRESSIONS



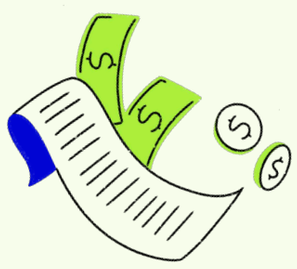
Source

Programmatic prioritizes transparency, improving media quality, efficiency, and performance

SHIFT TOWARDS A ZERO-TOLERANCE POLICY ON AD FRAUD

The industry is moving away from "fraud is inevitable" toward "fraud must be tackled"

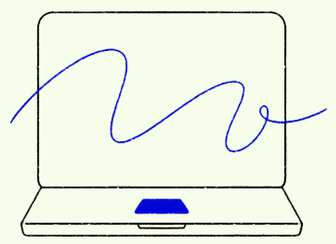
Fraud-free campaigns have become essential to protecting ROI and brand trust



AD FRAUD COSTS

The cost of ad fraud is estimated to exceed **US $6.5B** annually, while the presence of ad fraud reduces the ROI of digital campaigns by an average of **20–30%**

Source



IMPACT ON BUSINESS METRICS

Desktop & mobile web had an **IVT rate of 21%**, **mobile apps 24%**, and **CTV 18%**, underscoring that one-fifth of spend across major channels may be invalid.

Source



ZERO TOLERANCE SHIFT

The industry is moving away from "fraud is inevitable" toward **"fraud must be tackled"**.

Source



AI FRAUD DETECTION

Real-time **AI-based** invalid-traffic detection becomes **table-stakes** for U.S. programmatic by 2026.

Source

Digital advertising adopts zero-tolerance for fraud, using AI-driven detection and verification

TREND 05

THE POWER OF 1P DATA

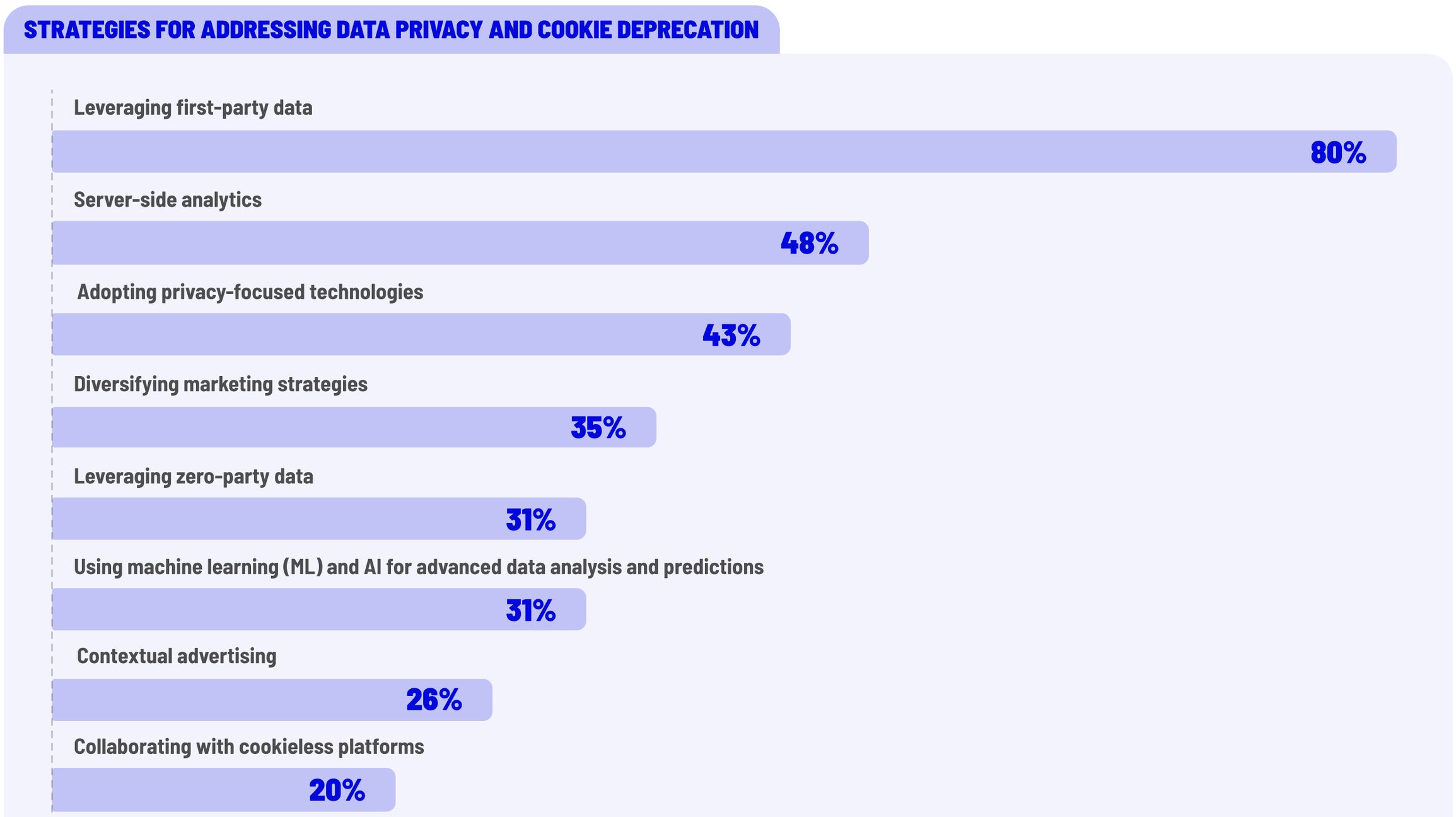
TREND 05:
THE POWER
OF 1P DATA

THE POWER OF 1ST PARTY DATA SHAPING 2026 ADVERTISING

The era of ‘data everywhere’ is over. New privacy rules are shifting power to brands, retailers, and publishers with direct consumer relationships — making owned data the only sustainable competitive advantage..

By 2026, the winners will be the brands who control their own data supply chain.

- **By 2026, marketers who rely on external data will be outpaced by those with robust first-party data infrastructures such as unified CRMs and Customer Data Platforms (CDPs).**
- **Clean, integrated first-party data enhances targeting accuracy, supports AI-driven campaign optimization, and enables dynamic personalization.**



Source: Salesforce, Emarketer, Garner

TREND 05:
THE POWER
OF 1P DATA

THE POWER OF 1ST PARTY DATA SHAPING 2026 ADVERTISING

By 2027, more than 75% of targeted advertising will rely primarily on first-party data, identity cohorts, or authenticated audiences.

Why this shift is happening?

71% of brands, agencies and publishers are increasing their first-party datasets

Source: Salesforce, Emarketer, Garner

TREND 05:
THE POWER
OF 1P DATA

CRM + 1ST-PARTY DATA

THE ENGINE OF SMARTER GROWTH

Brands are increasingly leaning on CRM and owned data to drive retention, personalization, and measurable ROI in a privacy-first marketing era.

Privacy-driven shift
As third-party cookies vanish, marketers are building new strategies around owned data. In a recent survey, 80% of marketers said first-party data would be their top asset for targeting and measurement in a cookieless future.

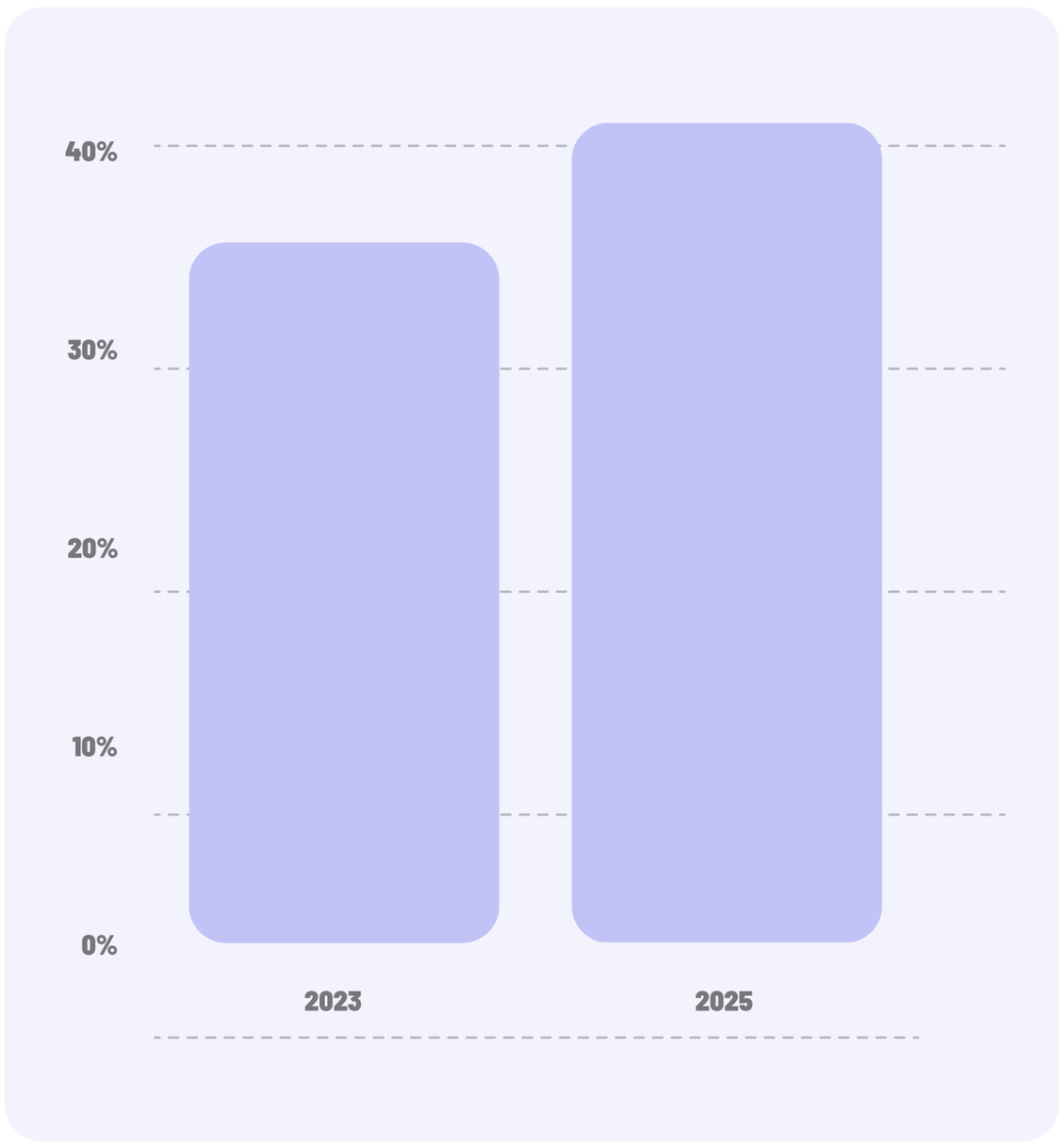
Data-Driven Growth
Brands are combining CRM, partner 1st-party, and public datasets (like UCC filings, NAICS codes, and CSM.gov) to refine audience insights, enabling smarter upselling, cross-selling, and retargeting strategies.

Retention is the new acquisition
As privacy tightens, CRM becomes the highest-ROI targeting channel—powering loyalty, repeat purchase, and predictive personalization.

EXAMPLE – PAYPAL ADS

Built entirely on first-party data, PayPal Ads (launched 2024) taps into **400M+ users** and **225B+ transactions** to deliver precise cross-merchant targeting — proving CRM-scale data drives real performance.

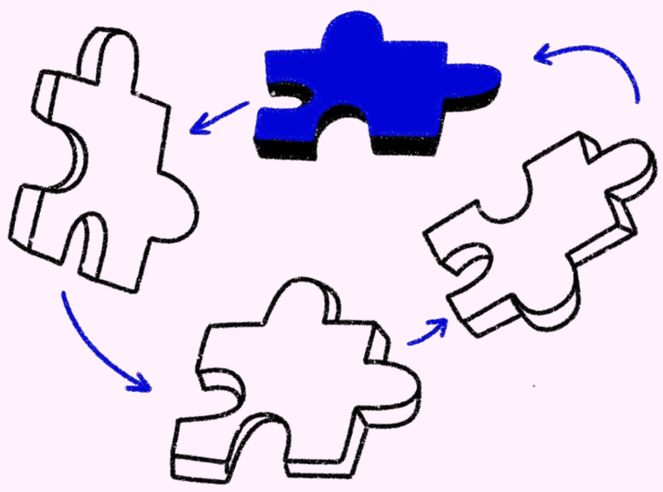
B2B companies using first-party data strategies experienced a 2× conversion lift and 30% lower acquisition costs relative to third-party approaches



Source: Emarketer, Neilsen. CDP Institute

1P DATA IS EVOLVING: NEW MODELS, NEW PARTNERS, NEW INFRASTRUCTURE

NEW DATA PARTNERSHIPS

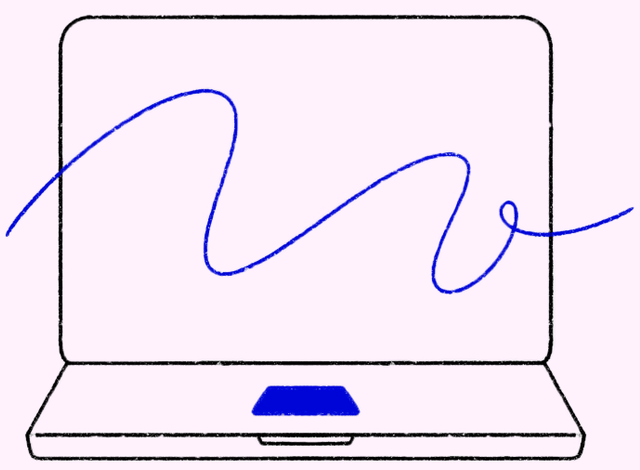


Retail media isn't limited to grocery. **Instacart, DoorDash, and Gopuff** are monetizing their 1P order data, while financial and travel brands are adopting "retail-media-style" models to unlock CRM data value.

Delta, United, and Marriott expanded their media networks —bringing travel CRM data into retail-media-style targeting.

instacart DOORDASH gopuff

M&A AND TECHNOLOGY

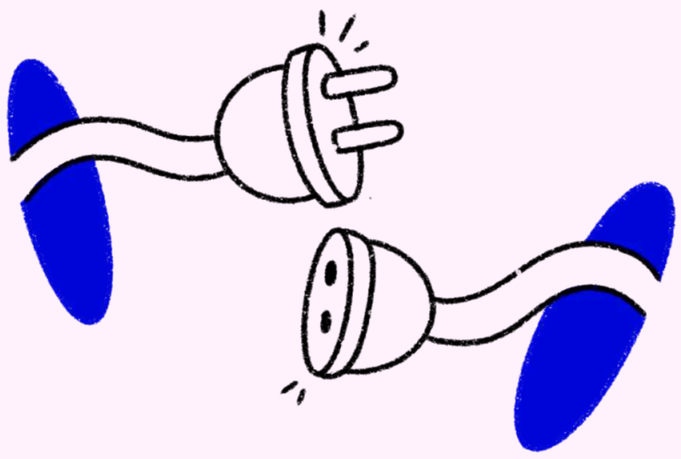


The race for 1P data is accelerating consolidation. **Zeta Global's** acquisition of **LiveIntent** and LiveRamp's purchase of **Habu** enable scaled, privacy-safe audience matching — improving targeting precision and data interoperability.

Snowflake expanded Native Clean Rooms, accelerating privacy-safe audience matching across brands + publishers.

/LiveRamp LiveIntent Habu ZETA

ORGANIZATIONAL ALIGNMENT



Roughly **30%** of firms now invest in **Customer Data Platforms (CDPs)** and unify CRM, loyalty, and transactional data to connect offline and online measurement — a crucial step toward omni-channel activation.

Over **40%** of enterprises integrated loyalty data into **CDPs** to support privacy-compliant personalization.

Source: Salesforce, IAB, Skift, Snowflake

TREND 05:
THE POWER
OF 1P DATA

1P DATA IS EVOLVING: NEW MODELS, NEW PARTNERS, NEW INFRASTRUCTURE

84% of marketers use 1P data — but only **31%** can unify it.
The gap is the opportunity.

WAYS TO LEVERAGE THESE TRENDS

ADOPT PRIVACY-BY-DESIGN TOOLS

Invest in clean rooms and consented data systems to future-proof campaign measurement.

ACTIVATE LOYALTY DATA

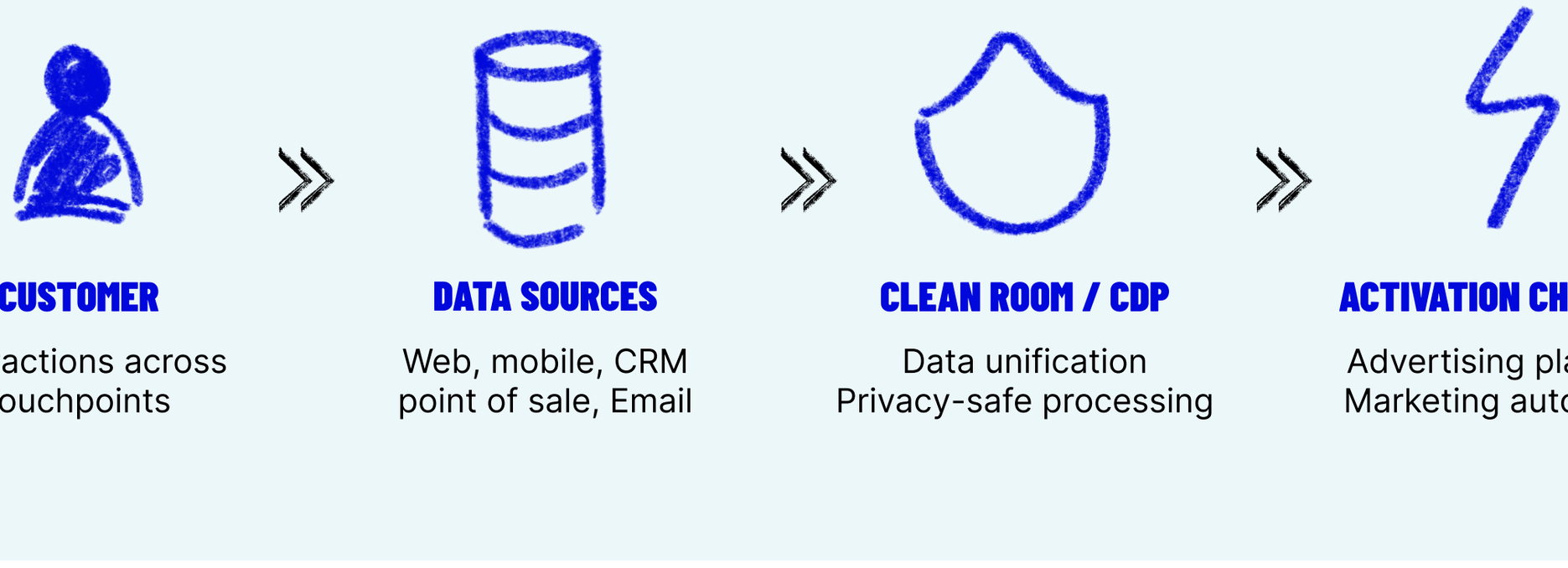
Use transactional and behavioral insights for retention, upsell, and personalized engagement opportunities.

LEVERAGE CRM + CDP INTEGRATION

Unify customer data across touchpoints to build richer, privacy-safe audience segments.

EXPLORE NEW DATA PARTNERSHIPS

Tap into retail media networks or vertical data alliances (e.g., travel, finance) to enhance targeting.



Source: Salesforce, IAB, Skift, Snowflake

TREND 06

THE PUSH FOR PRIVACY

PRIVACY ISN'T A SPEED BUMP— IT'S THE PERMANENT END OF SURVEILLANCE ADVERTISING

In 2026, compliant data frameworks aren't a legal requirement—they're a competitive strategy.

2025 Privacy Laws Taking Effect

- MARYLAND LOCATION PRIVACY ACT
- NEW JERSEY DATA PROTECTION ACT
- WASHINGTON MYHEALTHMYDATA EXPANSION
- EU AI TRANSPARENCY REQUIREMENTS

CONSUMER BACKLASH

Privacy is a top concern for users. 78% of U.S./Canadian consumers said they support laws forcing full transparency about how ads use personal data.

Emphasizing campaigns around CRM/email targeting, loyalty audiences, and publisher data partnerships, and less on anonymous third-party segments.

MEDIA SHIFTS

Reflecting consumer sentiment, brands are realigning spend and are explicitly prioritizing ad buys that tap their own data.

For example, 54% of advertisers are increasing publisher-direct deals (PMP/PD deals) and 52% are boosting programmatic direct buys to leverage authenticated first-party audiences.

STRATEGY PIVOT

Many marketers (~85%) say they're adjusting the mix of first-, second-, and third-party data to maximize scale while staying compliant.

Emphasizing campaigns around CRM/email targeting, loyalty audiences, and publisher data partnerships, and less on anonymous third-party segments.

Source: IAB, gumgum, & One Trust

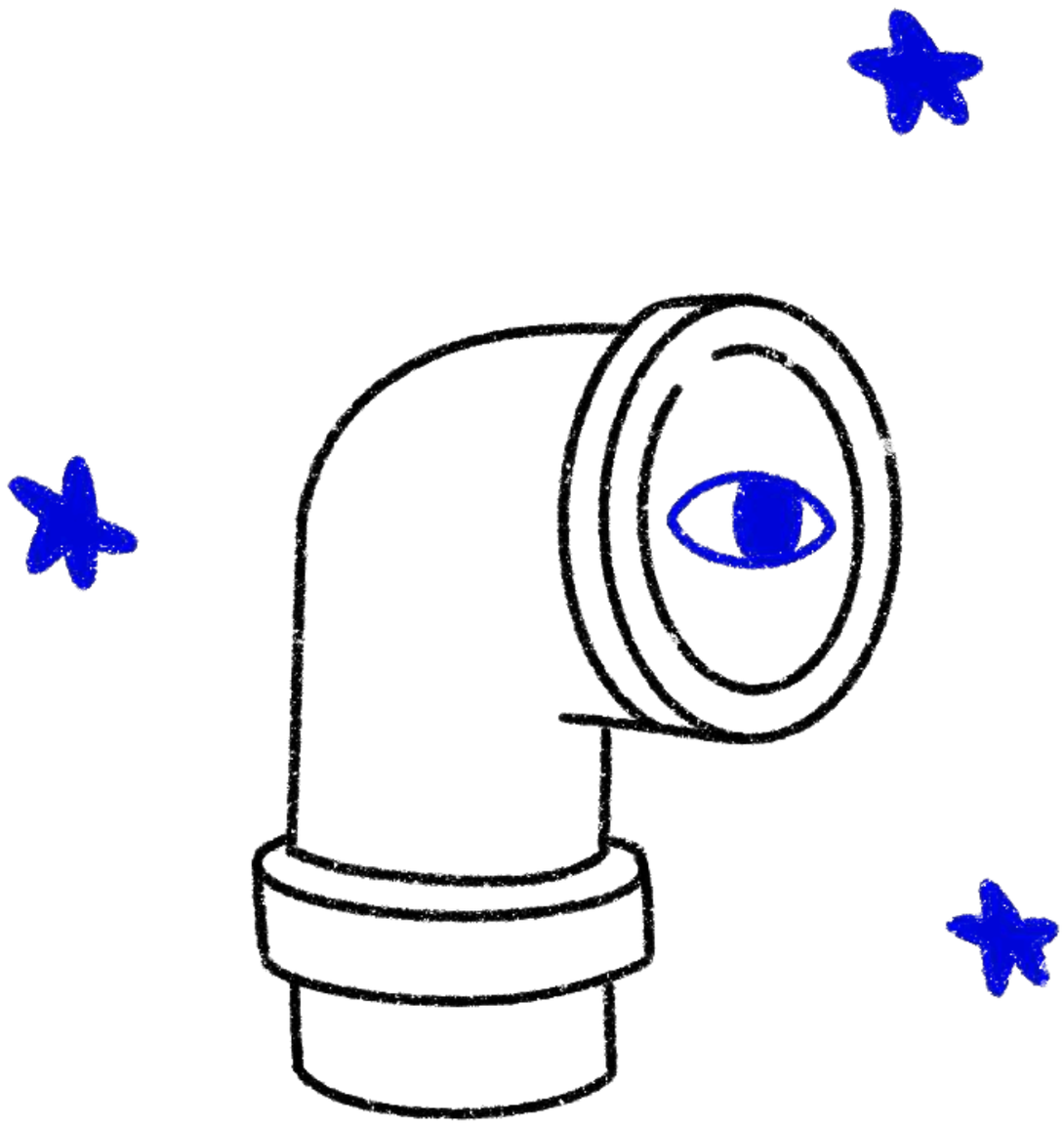
ADVERTISING PRIVACY PRIORITIZATION

In 2026, privacy-first marketing is not optional — brands must communicate transparency, consent, and ethical data practices as consumer awareness increases.

90%
of ad buyers have adjusted personalization tactics, media mix, and data strategies to align with privacy rules

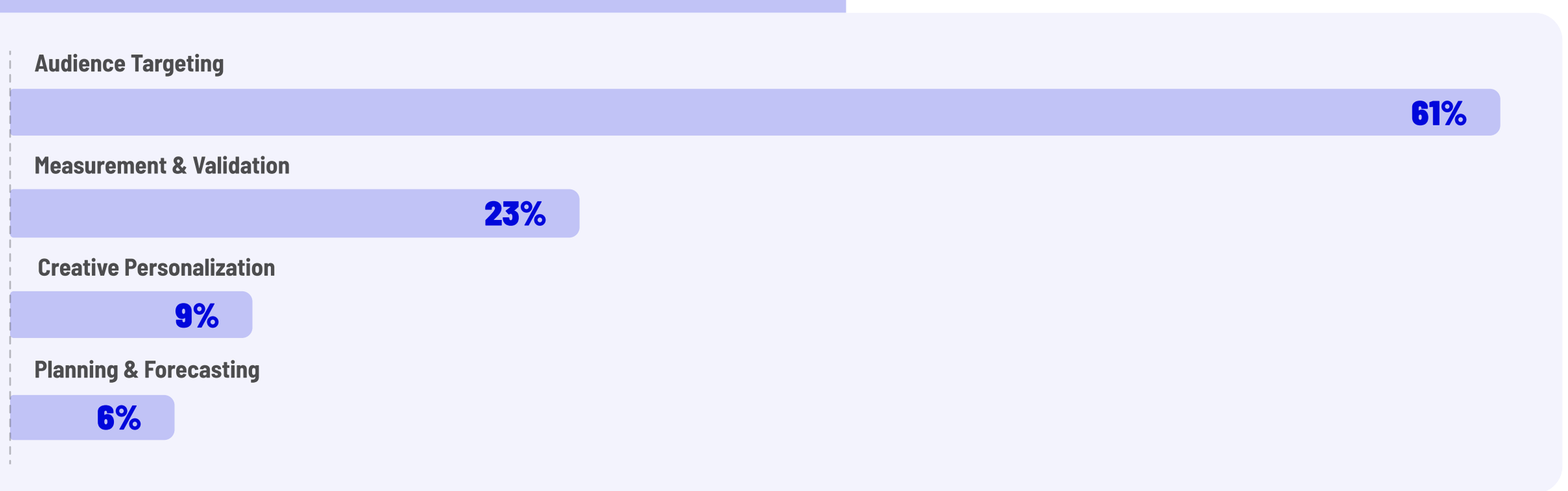
95%
of U.S. marketing and data leaders expect ongoing privacy laws and signal loss beyond 2024

64%
of U.S. marketing and data leaders expect ongoing privacy laws and signal loss beyond 2024



Brands using first-party identity saw 25–35% lower CPA vs. third-party lookalike audiences

THE DIGITAL AD COMPONENT MOST IMPACTED BY UPCOMING PRIVACY LAWS



Source: IAB, Liveramp

TREND 06:
THE PUSH
FOR PRIVACY

ADVERTISING PRIVACY PRIORITIZATION

MAJOR PRIVACY SHIFTS

LEGISLATIVE MOMENTUM

ORGANIZATIONAL CHANGES

SHIFTING BUDGETS

CONSUMER TRUST

DATA PRIVACY LAWS' CURRENT IMPACT

When asked if data privacy laws are currently impacting advertising efforts, most respondents indicated that they've already adjusted their overall digital ad strategy, with targeting requiring the largest strategy adjustments to-date.



Source: IAB, Kantar, AWS

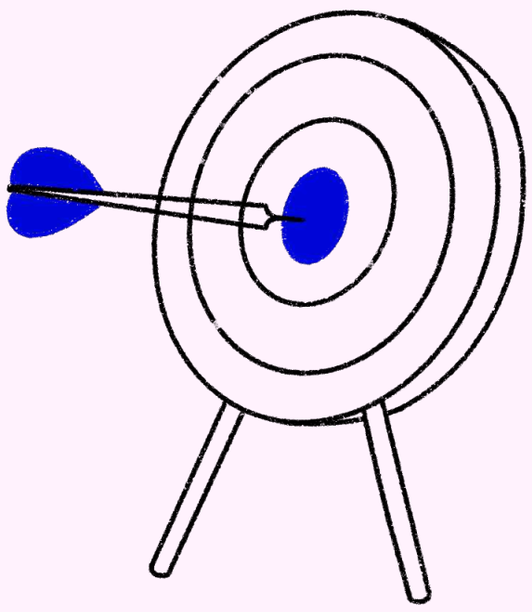
PRIVACY-SAFE ADVERTISING METHODS

As identifiers disappear, privacy-safe activation is becoming the core of media planning—not the workaround.

Ad budgets are moving into privacy-safe channels, allocating more spend to **ctv, retail media and social,** which use first-party data, and reducing reliance on cookie-based channels.

Nearly 90% of ad buyers have already modified their personalization tactics, media mix, and data strategies to align with privacy changes

CONTEXTUAL TARGETING



Ads based on page content (not user IDs) are surging. In 2024, **66% of contextual ad buyers** planned to increase their spend on contextual campaigns, since these placements aren't affected by cookie loss. Creative context is now seen as more "natural" and builds trust.

EMERGING CHANNELS



Advertising in trusted, non-tracking spaces is rising. Retail media is among **the fastest-growing channels**—consumers trust ads on retailer sites using first-party data. Premium publisher inventory is regaining favor as safe, contextual ad space. **Blending first-party and contextual data** is now standard.

CLEAN ROOMS & IDS



2025 marks the shift from testing to scaling — clean rooms are now becoming core to cross-channel measurement. Brands are testing privacy-safe tools like **hashed email matching** and **data clean rooms; 28%** have invested so far. Awareness of **Google's Privacy Sandbox is high**, though adoption is still limited.

Source: IAB, Kantar, AWS

TREND 07

ENTERING THE CONSOLIDATION ERA OF ADTECH

TREND 07:
ENTERING THE CONSOLIDATION ERA OF ADTECH

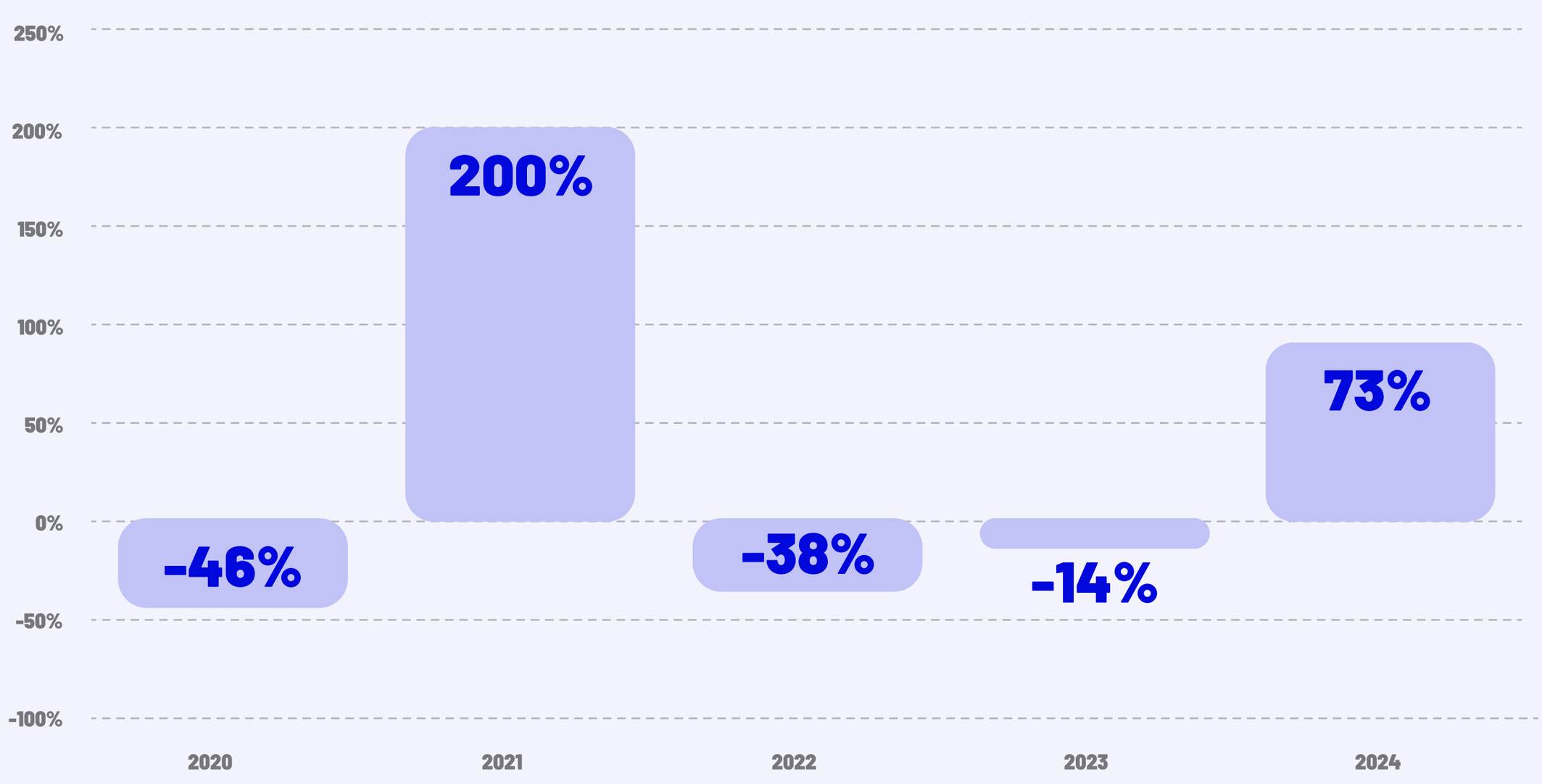
A RESURGENT M&A LANDSCAPE IN ADTECH

- 83 total AdTech M&A deals occurred in 2024, the highest number since 2021, which saw 90 M&A deals in the sector.
- 2024 represented the first year of truly natural M&A growth, as the 2021 explosion came off the heels of post-COVID optimism in the industry.
- The resurgence of M&A in AdTech reflects the sector entering a consolidation phase in which large players are evolving their offering by acquiring smaller players to develop a more favorable market position.

The M&A trend has continued into 2025, with Q1 and Q2 M&A deals increasing by 33% and 16% YoY respectively

Source

YOY ADTECH MERGERS AND ACQUISITIONS VOLUME



Source: Luma Partners

TREND 07:
ENTERING THE CONSOLIDATION ERA OF ADTECH

THE GIANTS ARE GETTING BIGGER, AND THE WALLS ARE GETTING TALLER

Amazon + Microsoft
Following Microsoft's decision to sunset their ad products, Amazon announced that it would be inheriting Microsoft ads users, and bringing the Microsoft Invest supply platform into its tech stack.

MediaOcean + Innovid
MediaOcean's acquisition of Innovid, creates a full-stack omni-channel advertising platform that manages ad serving, buying and measurement across all key programmatic channels – ultimately delivering a possible alternative to Google's suite of advertising tools.

Equativ + ShareThrough
Long a leading supply source in Europe, Equativ completed its acquisition of Montreal based SSP Sharethrough, giving Equativ true global presence that competes with Magnite, Index Exchange and PubMatic.

Publicis + Lotame
Publicis' 2025 acquisition of Lotame adds to their 2019 Epsilon purchase, creating an ID graph that reaches 91% of internet users, while powering their CoreAI platform.

EFFECTS OF CONSOLIDATION ON ADVERTISERS

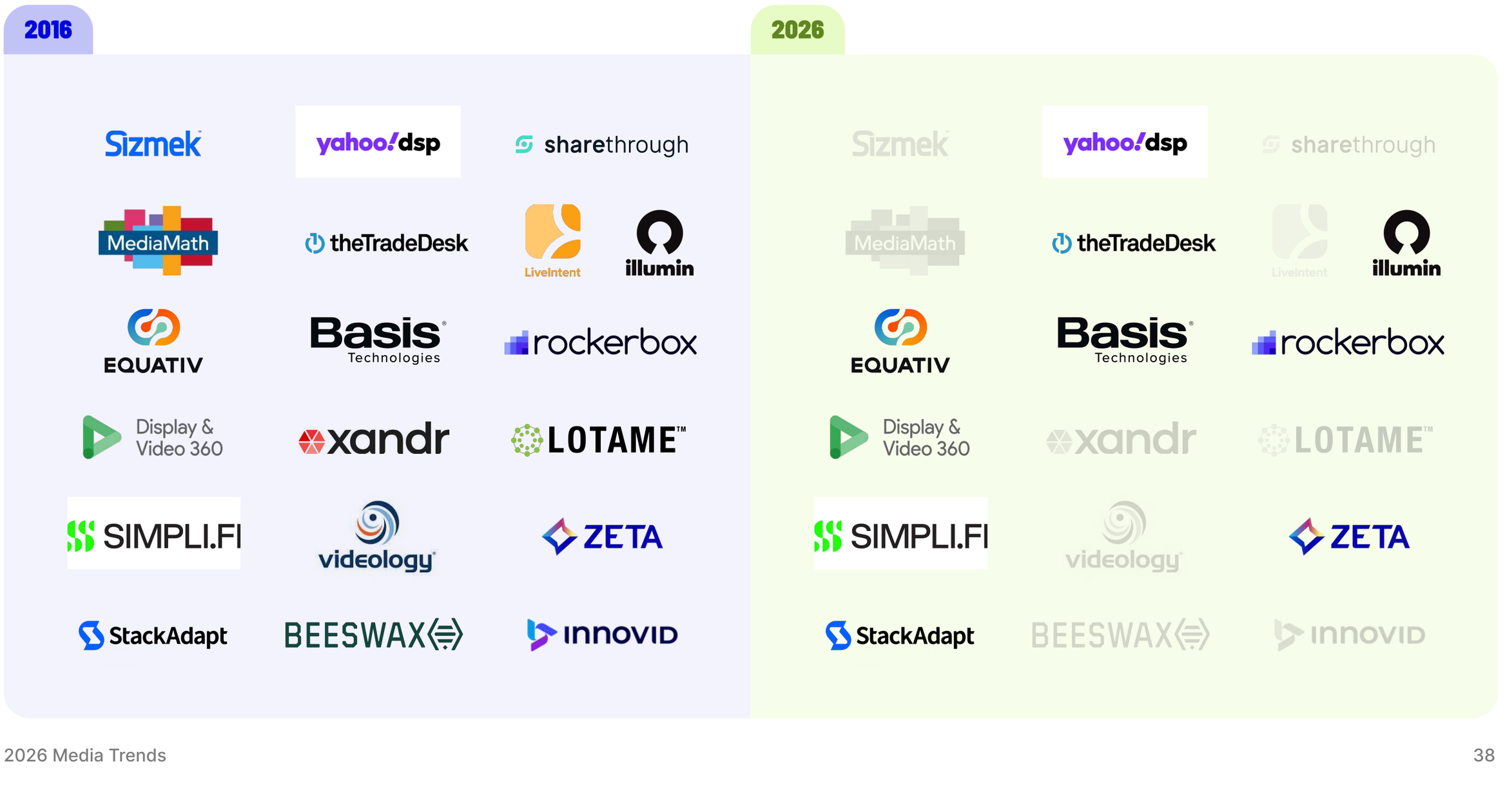
- When services are consolidated under one roof, advertisers run the risk of being locked into closed ecosystems, reducing leverage for rate negotiation and transparency.
- Supply consolidation limits overall competition in the market, raising floor rates and increasing overall CPMs.
- Data consolidation can create procedural headaches for advertisers, as data companies may no longer be able to work with competitors of their holding company.

TREND 07:
ENTERING THE
CONSOLIDATION ERA OF
ADTECH

ACCELERATING TOWARDS CONSOLIDATION IN ADTECH

Programmatic Ad spend is increasingly trending towards a few key players, making it difficult for smaller, independent platforms to remain afloat.

It will be important for advertisers to ensure partnerships are future-proofed as we head further down the road towards industry consolidation



TREND 07:
ENTERING THE CONSOLIDATION ERA OF ADTECH

CONSOLIDATION TRENDS POINT TOWARDS A FIGHT FOR AUDIENCE DATA OWNERSHIP

DEMAND CONSOLIDATION

SELLER	BUYER
xandr	amazon
INNOVID	mediaocean
vistar media	T-Mobile
blis	T-Mobile

SUPPLY CONSOLIDATION

SELLER	BUYER
xandr	amazon
sharethrough	EQUATIV
Walmart	VIZIO
vistar media	T-Mobile
VIANT.	lookr

DATA CONSOLIDATION

SELLER	BUYER
LOTAME	PUBLICIS GROUPE
LiveIntent	ZETA
Habu	/LiveRamp
Sincera	theTradeDesk
rockerbox	DoubleVerify

TREND 07:
ENTERING THE CONSOLIDATION ERA OF ADTECH

CONSOLIDATION'S IMPACT ON RATES AND EFFICIENCY

Consolidation in AdTech can have varied impacts on CPMs. In some cases, consolidation may bring about lower CPMs, as consolidation can remove unnecessary parties from the bitstream.

However, in most cases, consolidation will raise CPMs for advertisers via vertical integration and higher deal floors

VERTICAL INTEGRATION



From an advertising perspective, we see vertical integration when both a DSP and SSP are under one roof. This type of organization allows companies to increase the amount an advertiser pays and decrease the amount a publisher receives.

As a real-world example, Google, through ownership of both a DSP and SSP, **was caught increasing advertiser fees by an estimated 20% above auction price.**

HIGHER DATA FLOORS



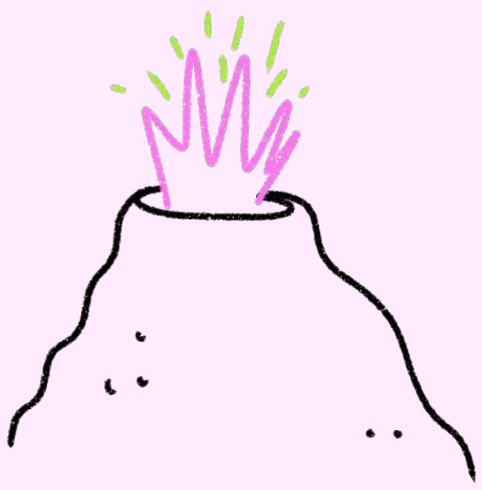
As the number of SSPs decrease (see Equativ's Sharethrough acquisition), competition will also decrease.

Additionally, as SPO has consolidated the bid stream, publishers have implemented higher deal floors, frequently negating the efficiency benefits that supply path consolidation can provide.

Source: Naag.org, Publift.com

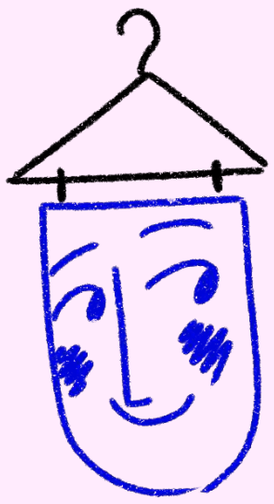
DATA CONSOLIDATION'S IMPACT ON CONSUMER PRIVACY

Data is no longer a targeting tool; it is a modeling tool that let's holding companies predict the market before it moves.



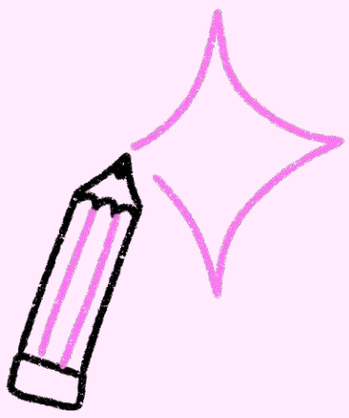
EROSION OF OPT-OUT RIGHTS

Data consolidation transfers ownership of data from true third-parties, to large advertising conglomerates. With less data being sold, consumers have less control over "opting-out", as it is difficult to opt-out from data when it is being leveraged internally.



END OF ANONYMITY

When companies like Experian and Audigent come together, they are bridging two distinct data sets that when connected, form a much fuller picture of an individual.



AI MODELING

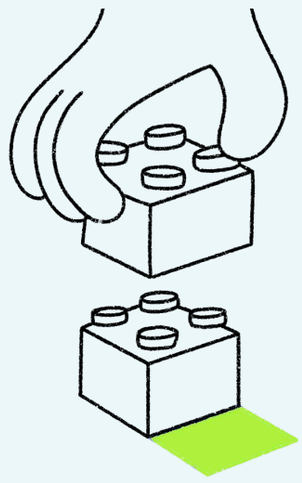
The next era of advertising will not rely on behavior, but rather it will lie in prediction. Following the Lotame acquisition, Publicis has over 4 billion user profiles at their disposal, and they will use that information to figure out what you will buy, before you even know you want to buy it.

HOW ADVERTISERS ENSURE SUCCESS IN A CONSOLIDATED ADTECH LANDSCAPE



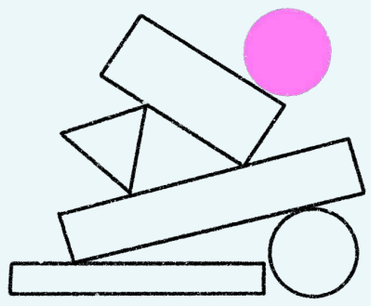
DIVERSIFIED DEMAND PARTNERSHIPS

Single ecosystem buying means reduced reach, reduced inventory, reduced optimization and singular attribution methodologies. Diversified buying maximizes reach and inventory while tapping into multiple attribution models to give a holistic view of campaign performance.



LEVERAGE AI THE RIGHT WAY

Many AI based optimization models are inherently biased to maximize a DSP’s bottom line, and not campaign performance. Multiple AI bidding algorithms should be at an advertiser's disposal to ensure they are leveraging AI in a way that serves their best interests.



SUPPLY PATH OPTIMIZATION

Vertical integration encourages companies to funnel media dollars through owned & operated platforms, regardless of campaign goals. Supply Path Optimization gets rid of unnecessary intermediaries, ensuring that inventory is reached as efficiently as possible, allowing more dollars to go to media, and less to fees.

TREND 08

CTV IS THE NEW BLACK

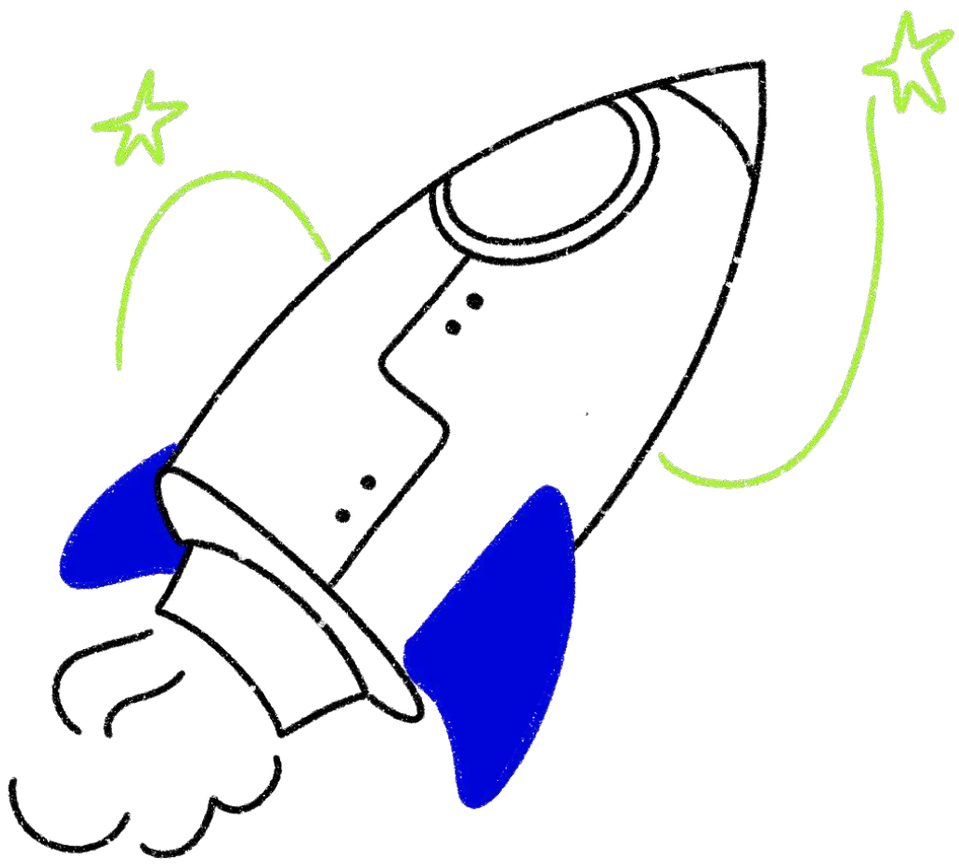
CTV IS THE NEW BLACK

CTV is no longer a niche channel—growing consumer adoption has made it one of the most widely consumed media platforms.

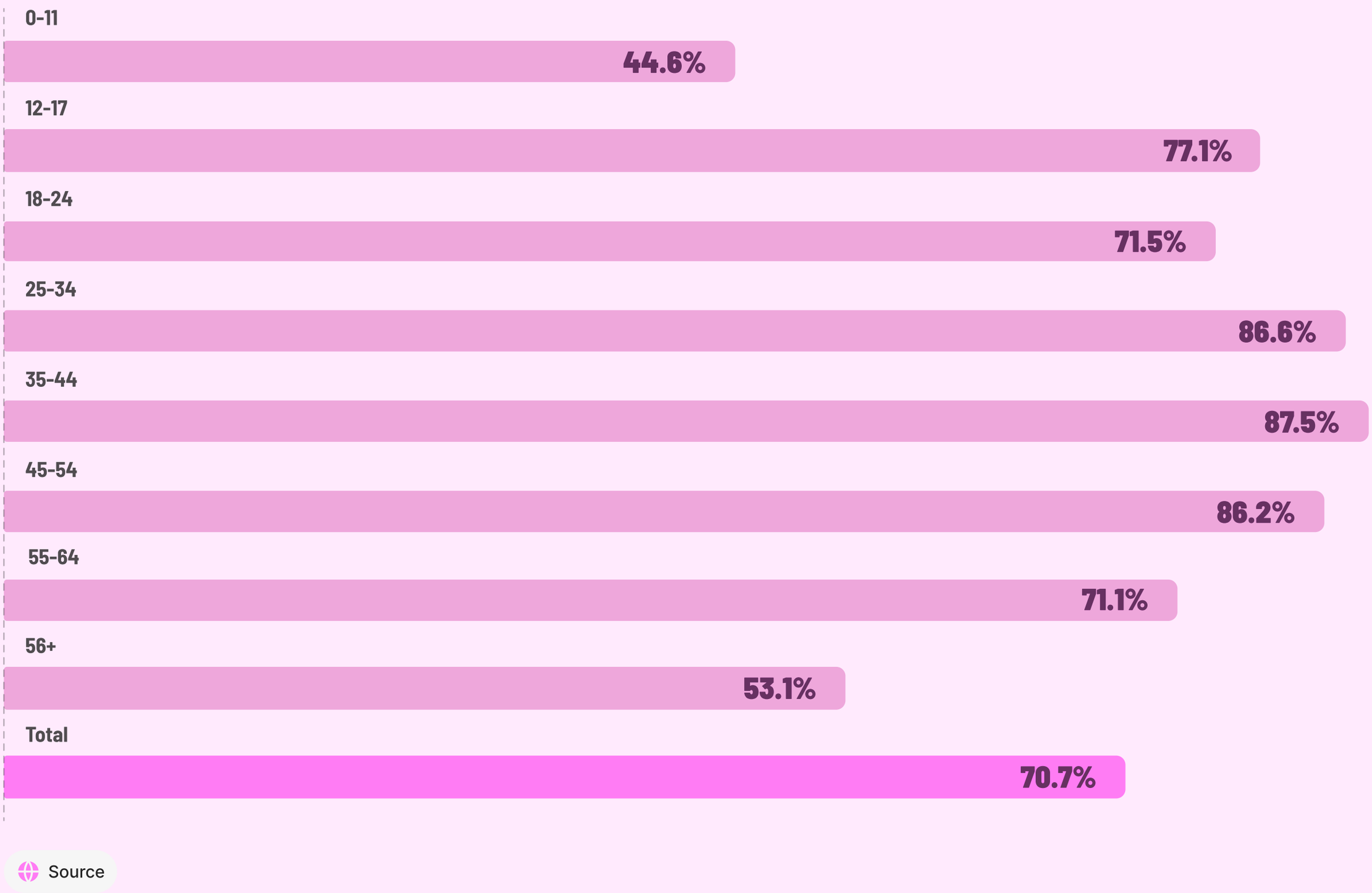
BROAD PENETRATION

88%
number of U.S. households with at least one Connected TV device

118M
households watching CTV1



TYPES OF DATA USED



Source

CTV IS THE NEW BLACK

SUSTAINABLE GROWTH FOR LOCAL CTV6

Connected TV (CTV) and **over-the-top (OTT)** advertising remain the fastest-growing segments in local media.

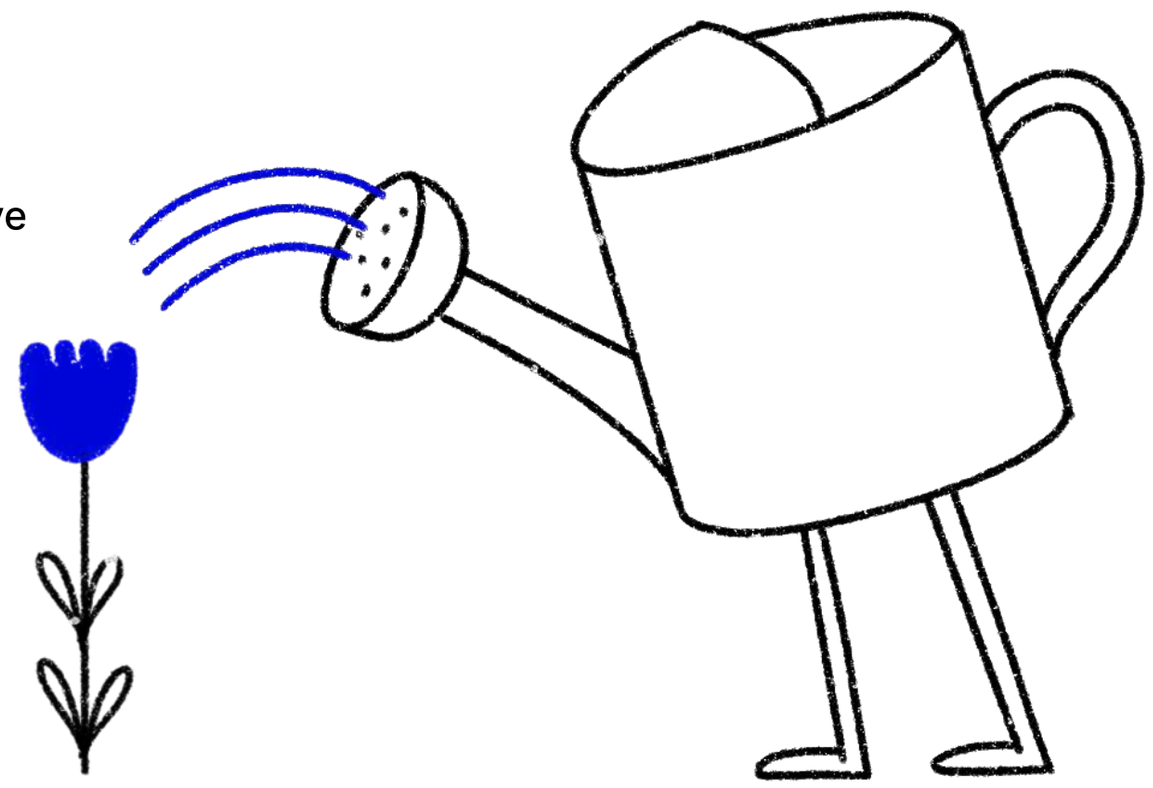
Several key industries are fueling the local ad market in 2025. The real estate sector is forecast to grow by 9.3%, while restaurants and retail are expected to rise by 9.2% and 6.8%, respectively. Education and automotive advertising are also experiencing notable increases, both projected to grow by 5.0%.

9.3%+
real estate sector

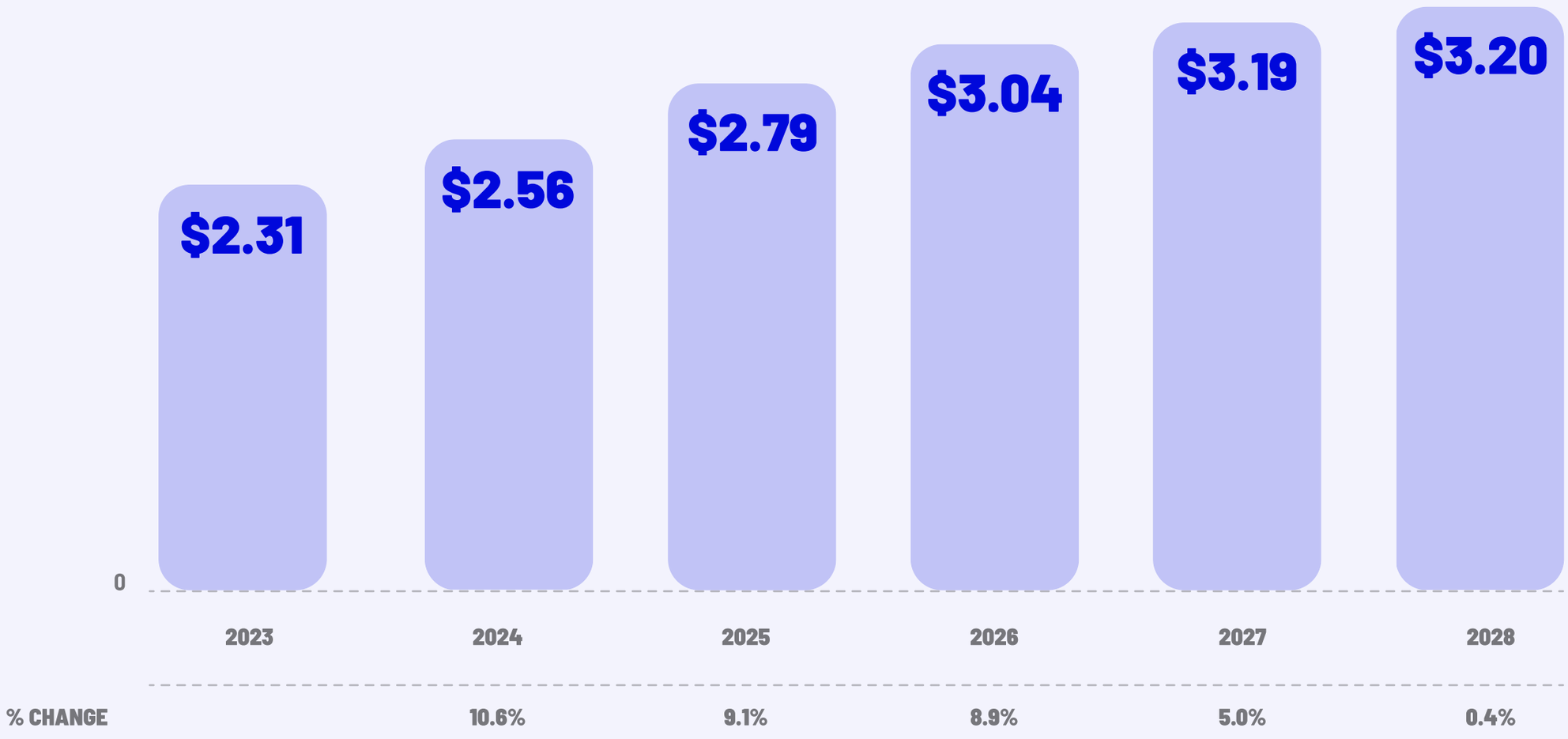
9.2%+
restaurants

6.8%+
retail advertising

5.0%+
education, automotive

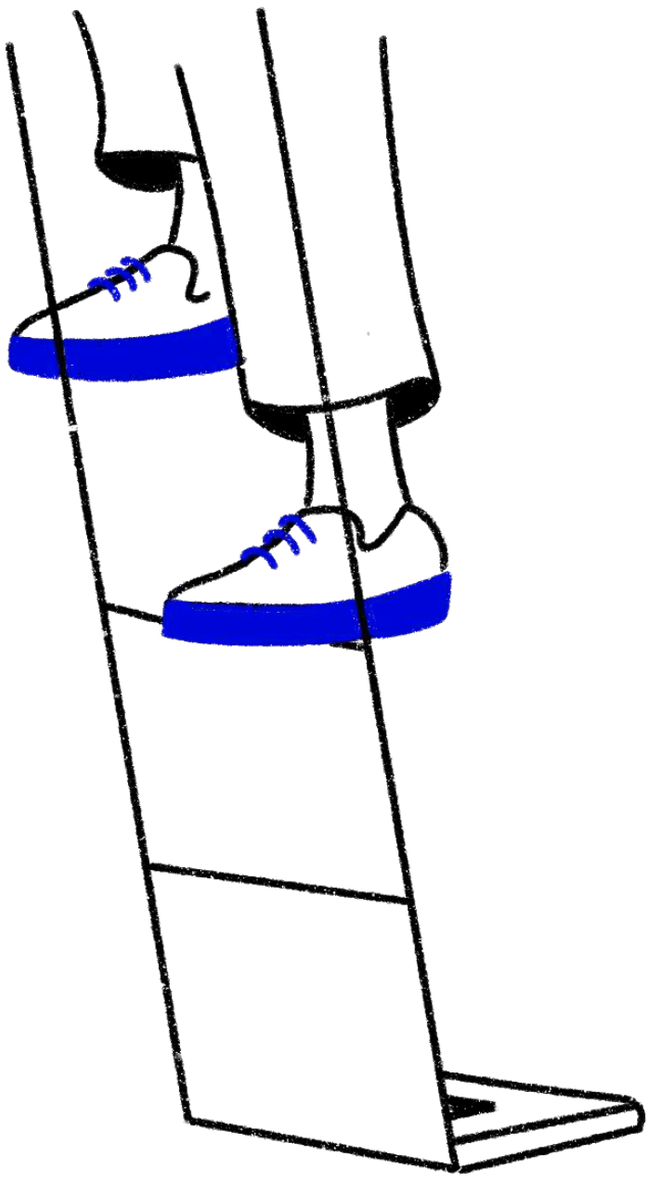


U.S. LOCAL CTV/OTT VIDEO AD SPENDING (IN BILLIONS)



Source

CTV IS THE NEW BLACK

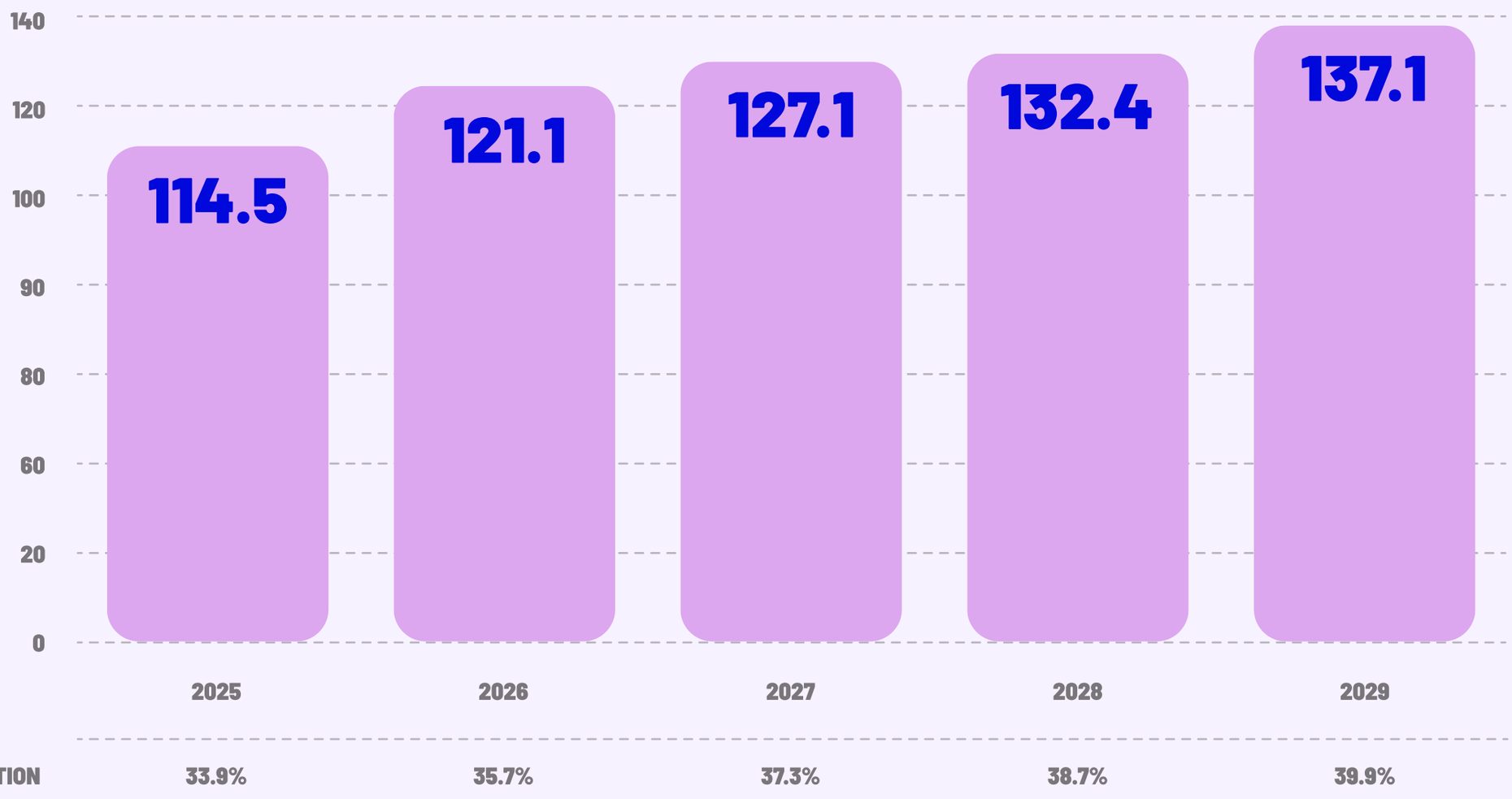


LIVE SPORTS KEEP GROWING

Several channels and platforms saw viewing hikes in August, largely driven by live sports, per Nielsen's August 2025 Media Distributor Index.

- **Fox and Disney** led the pack among legacy and linear networks, with Fox growing 10% YoY to a 6.7% total day viewing share and Disney growing 2% to a 9.5% total share.
- **YouTube** showed continued growth, up 24% YoY to a 13.1% share, while Netflix grew 10% to an 8.7% share and Amazon grew 22% to a 3.9% share.
- **NFL** pre-season content and college football led to a 4% gain for ABC affiliates, a 14% gain for Fox affiliates, and 25% gain for ESPN.
- **Paramount+** remained flat at 7.1%, while **NBCUniversal** saw a drastic downgrade, falling to a 7.6% share from 13.4% in August 2024.
- **Warner Bros. Discovery** also declined 16% to a 5.8% share.

DIGITAL LIVE SPORTS VIEWERS (IN MILLIONS)



Source

CTV IS THE NEW BLACK

RECORDING CONSUMPTION

Streaming Usage is Up 71% Since 2021, with YouTube, Netflix, and Other Platforms Showing Dramatic Growth Over Four Years.

Streaming Notches a Record 44.8% of Total TV Usage in May.

CTV time spent will overtake time with TV this year.

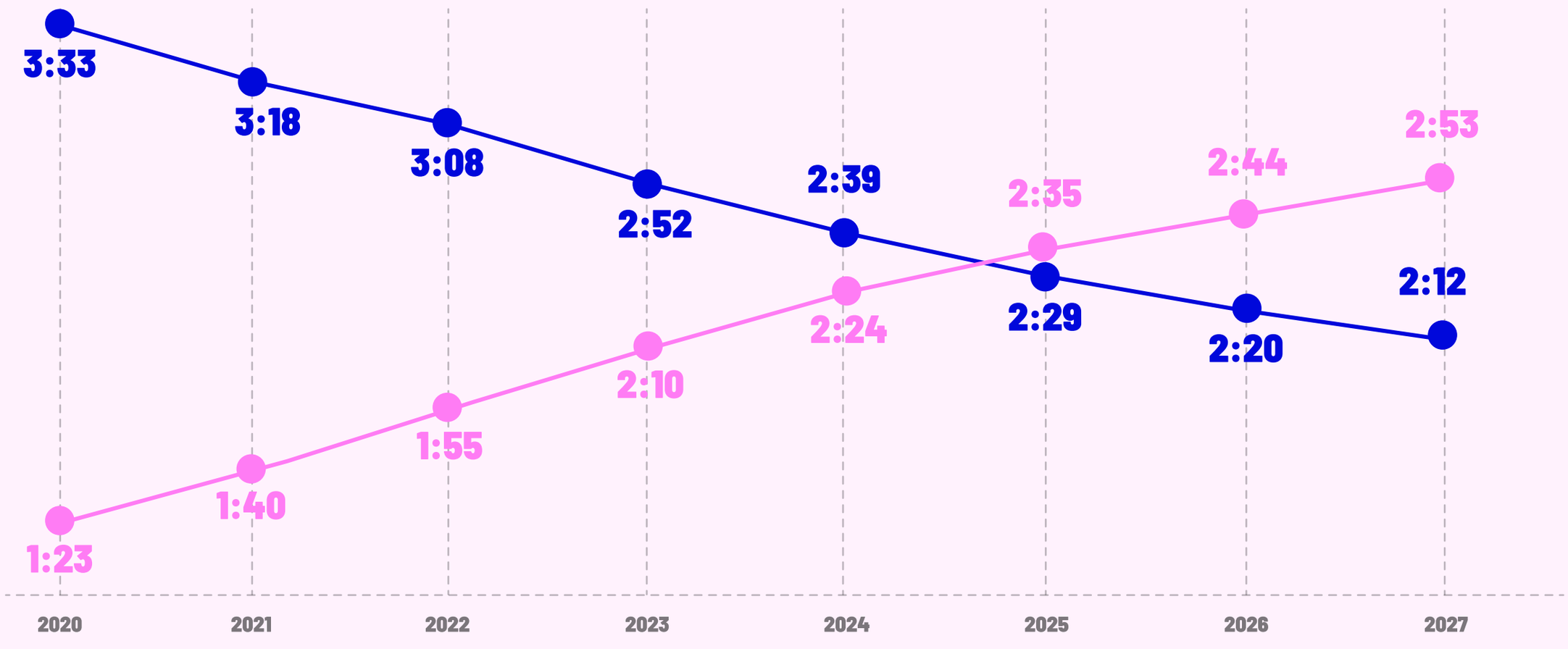
71%+
streaming usage since 2021

44.8%
of total TV Usage in May

Source

Adults will spend more time with CTV than with traditional TV for the first time this year

AVERAGE HRS:MINS SPENT PER DAY WITH CTV VS TRADITIONAL TV



Source

RAPIDLY EVOLVING CTV ADVERTISING ENVIRONMENT

The evolving advertising landscape presents both challenges and opportunities for advertisers.

KEY OPPORTUNITIES

Rise of AD-SUPPORTED Models
46% of premium SVOD subscriptions by Q1 2025.
86% subscriber acceptance.

Programmatic Dominates BIG SCREEN
90% of CTV spend transacted programmatically.
$27B projected in 2025.

Interactive & shoppable formats growth
45% of advertisers now integrating shoppable formats.
7.5M U.S. households purchased via CTV.

THE CHALLENGE: CTV MARKET FRAGMENTATION

<50% of marketers cite fragmentation and limited visibility as top pain points

Source

59% of consumers "churn and burn," making it harder to reach audiences

Source

AI DIGITAL RESPONSE

OPEN GARDEN APPROACH

Platform-agnostic strategy for unified reach.

PROGRAMMATIC EXCELLENCE

Real-time optimization across the ecosystem.

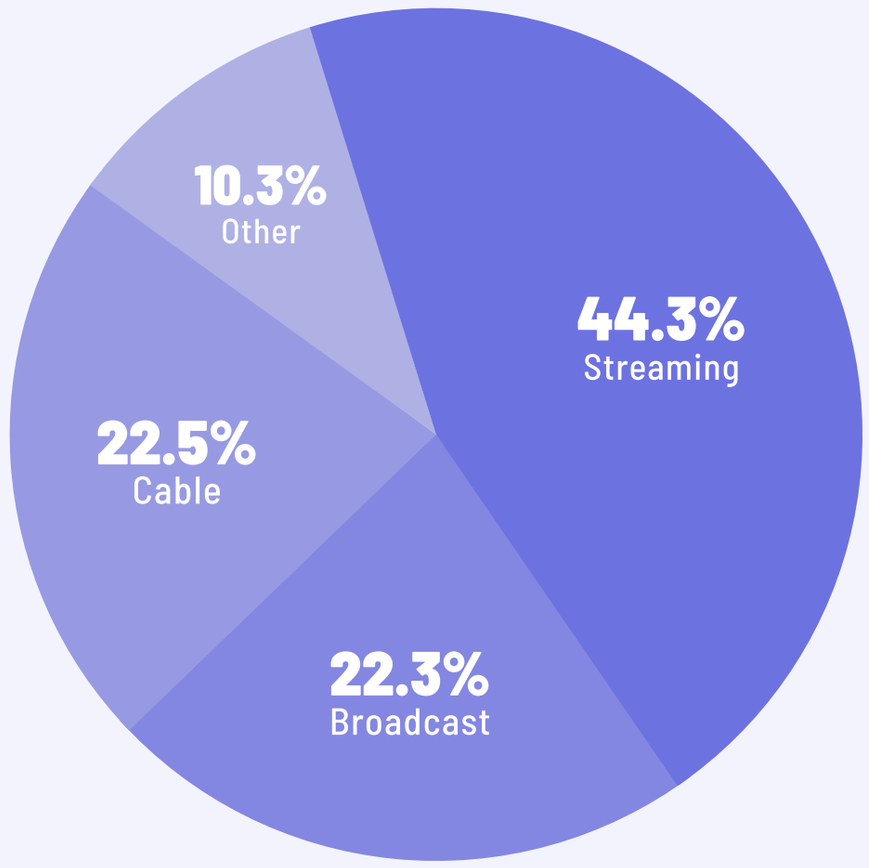
PARTNERSHIP FLEXIBILITY

Rapid integration from SMB to enterprise.

ADVANCED MEASUREMENT

MMM, path to conversion, cross-device tracking, solving fragmented measurement.

SEPTEMBER 2025



Source

TREND 08:
CTV IS THE
NEW BLACK

CTV IS A "MUST-BUY" TACTIC IN DIGITAL MEDIA PLANS

Driven by consumer demand and an actively developing programmatic landscape,
advertiser interest in CTV will continue to grow. We haven't reached the peak yet.

Consumers love Connected TV for **flexibility (70%)**, **premium and exclusive content (47%)**, and **less ads clutter (41%)** compared to Linear TV.

Source

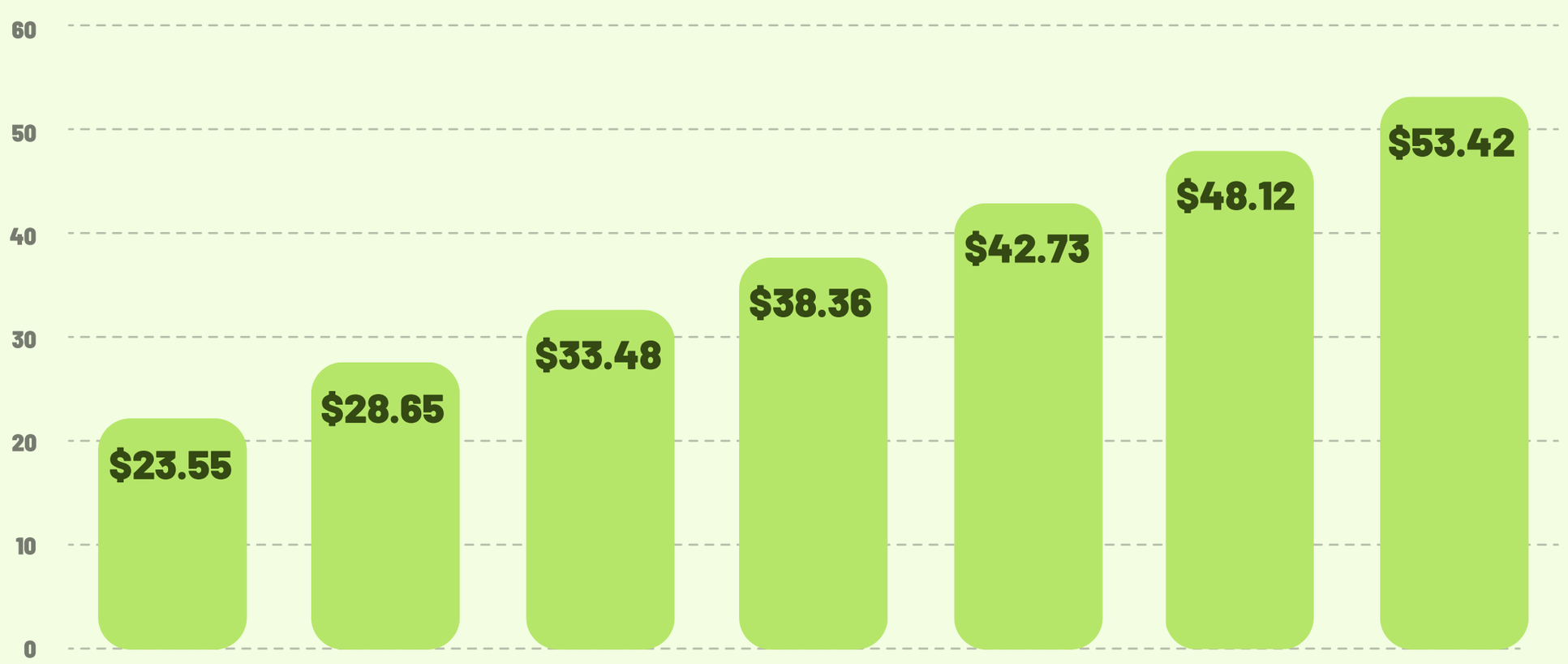
68%
of US marketers said that CTV is essential part of Video mix

Source

66%
marketers in North America plan to increase their CTV / OTT spends

Source

U.S. CTV AD SPENDING



	2023	2024	2025	2026	2027	2028	2029
% CHANGE	17.9%	21.7%	16.8%	14.6%	11.4%	12.6%	11.0%
% OF DIGITAL AD SPENDING	8.8%	9.2%	9.7%	10.0%	10.1%	10.5%	10.8%

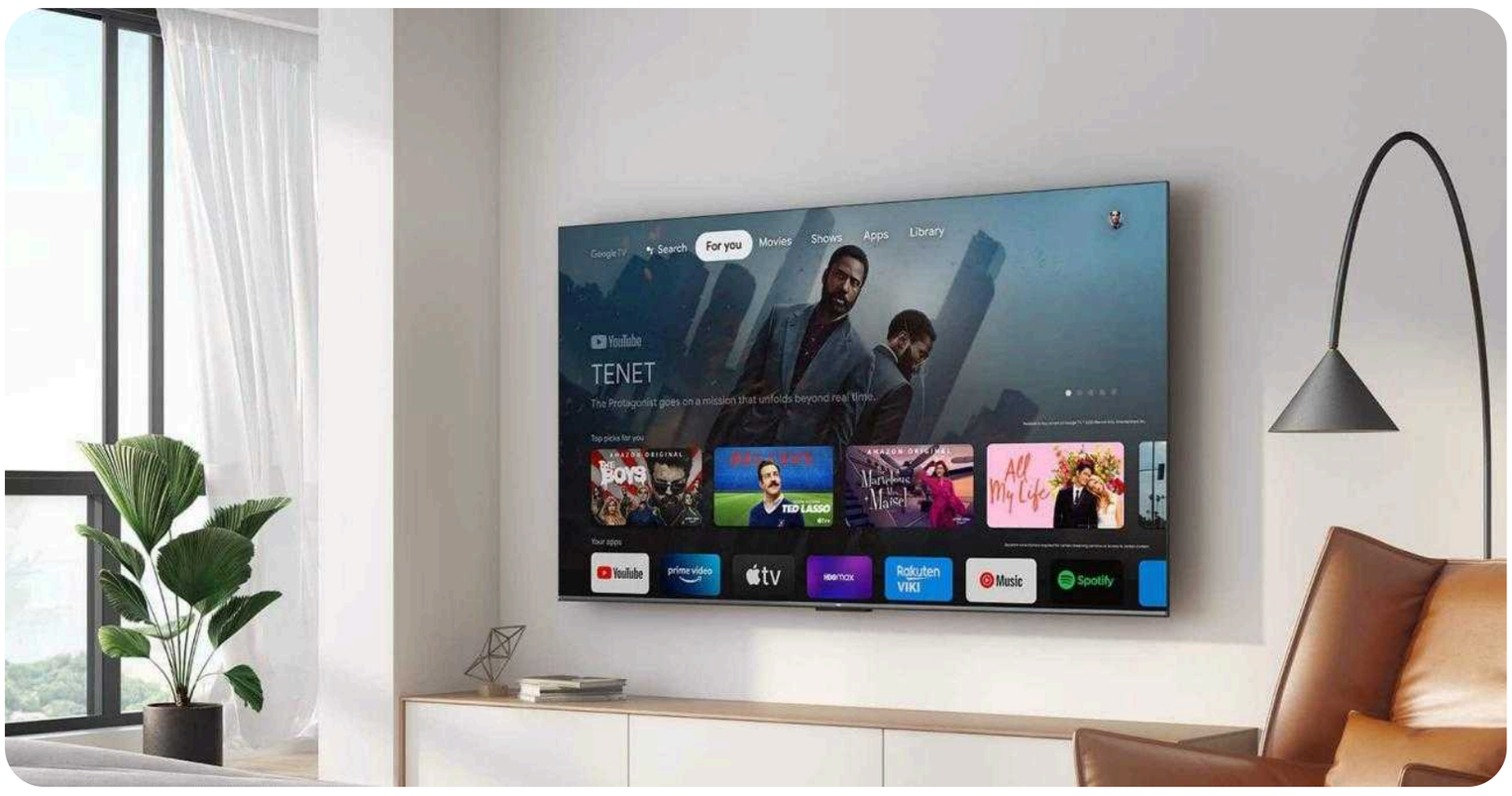
Source

TREND 08:
CTV IS THE
NEW BLACK

CTV IS A "MUST-BUY" TACTIC IN DIGITAL MEDIA PLANS

CTV has everything needed to be a must-buy channel—combining traditional advertising benefits with digital precision for reach at scale. However, **traditional TV** remains strong with older audiences, making a **hybrid TV + CTV** approach the optimal strategy today. As CTV adoption grows, it will likely become the leading video channel.

Hybrid video approach is essential now, but CTV is the future



LINEAR TV	DIGITAL
MASS REACH	PRECISE TARGETING
HIGH TRUST	INTERACTIVE FORMATS
BIG SCREEN	BETTER MEASUREMENT

TREND 09

THE WALLED GARDEN ERA SHIFTS FROM PROGRAMMATIC TO RETAIL MEDIA

THE WALLED GARDEN ERA SHIFTS FROM PROGRAMMATIC TO RETAIL MEDIA

AI DIGITAL RETAIL NEUTRAL APPROACH

An AI Digital Retail Neutral Approach enables brands to leverage AI-powered advertising across multiple retail media networks without vendor lock-in, delivering unified measurement, reduced complexity, and outstanding outcomes.
Just as we provide DSP-agnostic programmatic advertising, we apply the same agnostic approach to retail media navigating Amazon, Walmart, Target, and emerging platforms with consistent efficiency.

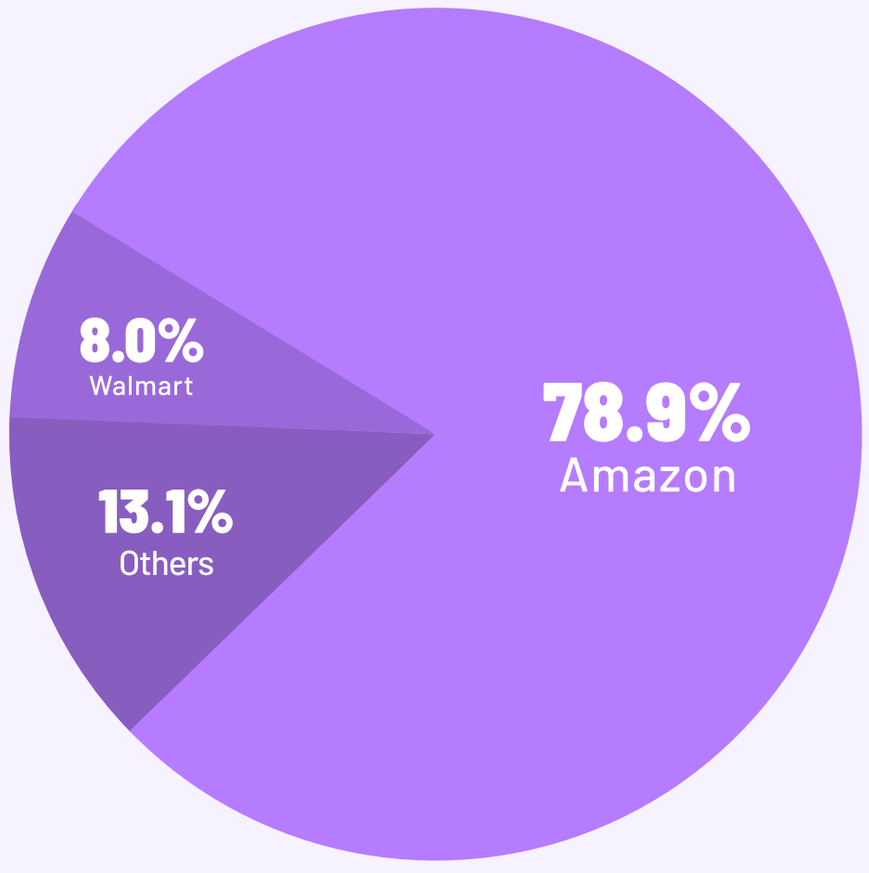
65%
of marketers say retail-media networks (built on retailer 1P data) will play a bigger role in their mix this year

$69B
expected volume of investments in Retail Media Advertising (RMN) in 2026

Source

Ahold Delhaize · belk · BEST BUY · Etsy · ebay · Albertsons · COSTCO WHOLESALE · Casey's · DOLLAR TREE · SEPHORA · instacart · CVS pharmacy · Kroger · STOP&SHOP · chewy · petco · KOHL'S · Foodland Food, Family, Friends & Aloha · 7-ELEVEN · gopuff · giant eagle · FOOD LION · Michaels · macy's · Price Chopper · piggly wiggly · Staples · NORDSTROM · meijer · Shipt · wayfair · weis · sam's club · Smart&Final · Office DEPOT

% OF US RETAIL MEDIA DIGITAL AD SPENDING



Source

TREND 08:
THE WALLED GARDEN ERA SHIFTS FROM PROGRAMMATIC TO RETAIL MEDIA

THE RISE OF FULL-FUNNEL RETAIL MEDIA

Full-Funnel Strategy
Leverage for both conversion and awareness via premium CTV/video

Omnichannel Integration
Unite CTV, audio, In-Store, social, and on-site ads with first-party data

Amazon-First Approach
75% of retail media spend. It provides full-funnel capabilities from awareness to purchase

CTV EXPLOSIVE GROWTH

3x
faster growth than search

$33B+
U.S. digital ad spend from retail CTV

15%
of total CTV spend

Source

OFFSITE EXPANSION

20%+
going to offsite channels in 2025

41%+
growth on 3rd-party publisher sites

Source

SEARCH DOMINANCE

$38B+
U.S. retail media search in 2025 (more than CTV or programmatic combined)

80%
of retail search controls Amazon

Source

TREND 09:
THE WALLED GARDEN ERA SHIFTS FROM PROGRAMMATIC TO RETAIL MEDIA

THE INVISIBLE SHOPPING REVOLUTION

AI Agents Will Shop for Us
By 2030, autonomous AI will perceive needs, make decisions, and fulfill orders—context becomes command

Winners Out-Listen, Not Outspend
Lean brands (<300 employees) win by detecting signals in real-time vs. focus groups

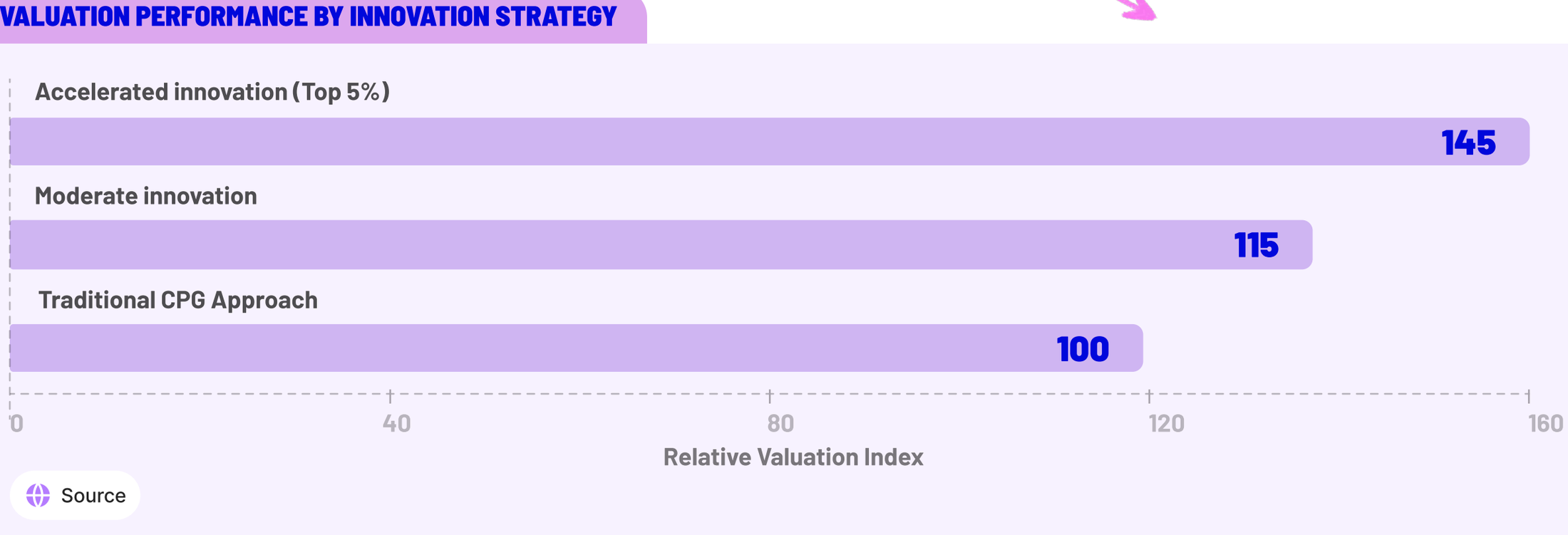
Categories Are Converging
Consumers think in outcomes (sleep, energy, confidence), not products—brands must build ecosystems

AI DIGITAL LABS
operationalizing AI for the agentic commerce era

The "48% Won't Survive" Problem: Led by Chief AI Officer David Mainiero, Labs moves beyond presentations to align leaders, coach teams, and ship solutions that stick, helping agencies forge and lock in their competitive edge in the generative era.

Companies resetting for consumer intimacy and agentic AI now will dominate — traditional models becoming irrelevant

VALUATION PERFORMANCE BY INNOVATION STRATEGY



Source

TREND 10

AUDIO + PODCASTS: FROM BACKGROUND NOISE TO UNTAPPED PRIME MEDIA

AUDIO + PODCASTS

From background noise to untapped prime media

Video podcasts are fueling a new wave of high-intent engagement. 87% of consumers now spend 2+ hours a day with audio, yet advertiser investment still trails behind, creating a rare white space for brands ready to move first.

Momentum & Opportunity
Podcasts will comprise of 1/3rd of digital audio ad spending in 2025 and will surpass $2.5 billion in overall ad revenues.

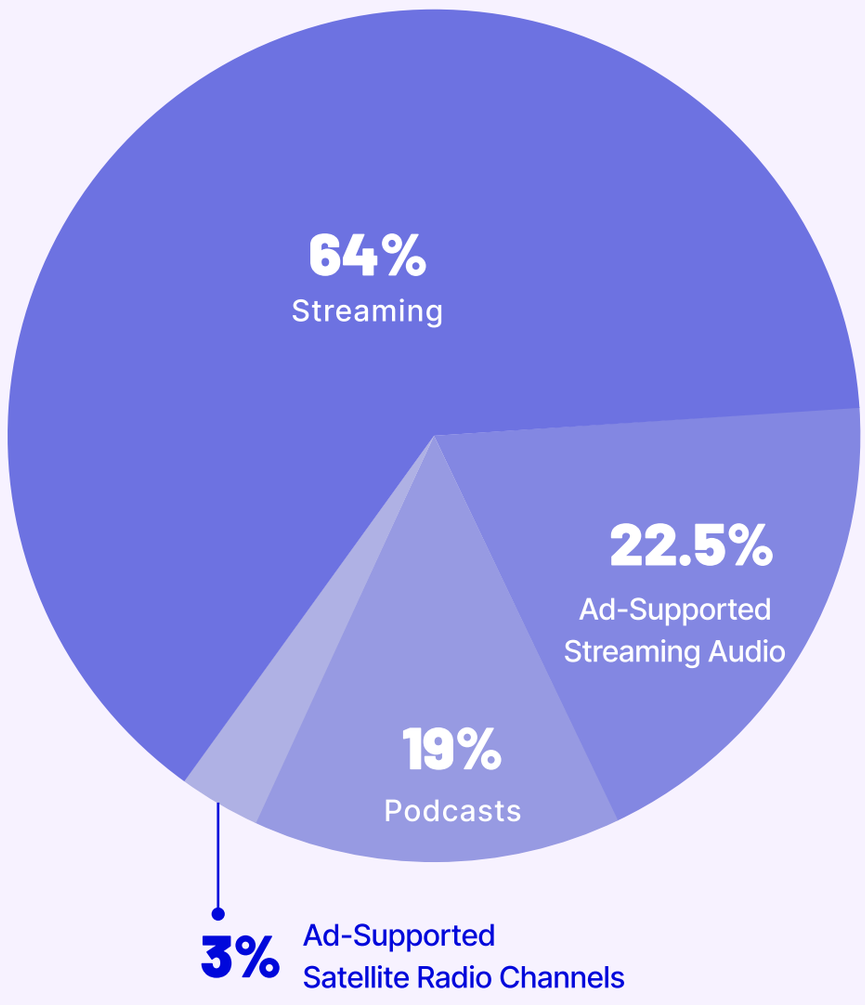
Video is accelerating discovery
53% prefer watching podcasts over just listening on YouTube and 3 in 10 listeners on Spotify watch rather than listen.

Reach the “ad-free” generation
Among listeners under 25, podcasts account for 32% of time spent with ad-supported audio compared with 20% of ad-supported streaming audio.

PODCASTS WILL CARVE OUT ALMOST 20% OF THE AD-SUPPORTED AUDIO MIX



% OF DAILY TIME SPENT LISTENING TO AD-SUPPORTED AUDIO



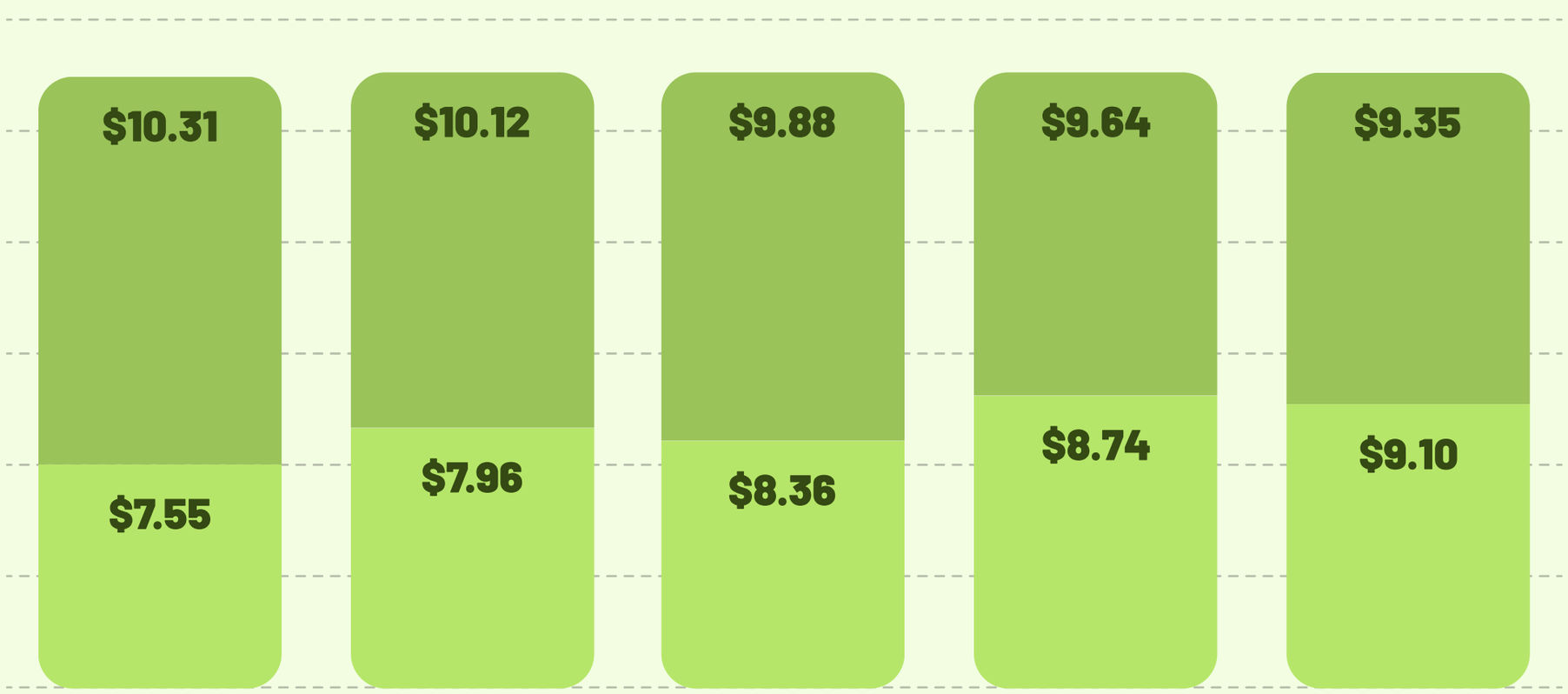
AUDIO + PODCASTS

From background noise to untapped prime media

- **Programmatic accounted for 3 in 10 digital audio services** ad dollars in 2025, crossing the $2B milestone.
- **Podcasts will comprise of 1/3rd of digital audio** ad spending in 2025 and will surpass $2.5 billion in overall ad revenues.
- **Pandora, Spotify, and iHeartMedia control about 50% of U.S. digital audio market** and are expanding programmatic and PMP capabilities to capture omnichannel demand.
- **As programmatic automates reach and efficiency, podcasts add premium depth** delivering high engagement and contextual alignment for brands.
- **Podcast monetization is evolving toward hybrid models** blending direct host-read ads with dynamic and programmatic delivery to balance authenticity with scalability.

In the U.S., 67% of consumers overall and 75% of internet users have listened to digital audio at least once a month in 2025

RADIO+ DIGITAL AUDIO SERVICES AD SPENDING



	2025	2026	2027	2028	2029
% CHANGE	1.4%	1.2%	0.9%	0.7%	0.5%
TOTAL	$17.86	$18.08	$18.24	$18.37	$18.46

4-YEAR CAGR	
	-2.4%
	4.8%
TOTAL	0.8%

Source: eMarketer

TREND 10:
AUDIO + PODCASTS: FROM BACKGROUND NOISE TO UNTAPPED PRIME MEDIA

AUDIO ISN'T DISAPPEARING – IT'S EVOLVING INTO VIDEO PODCASTS

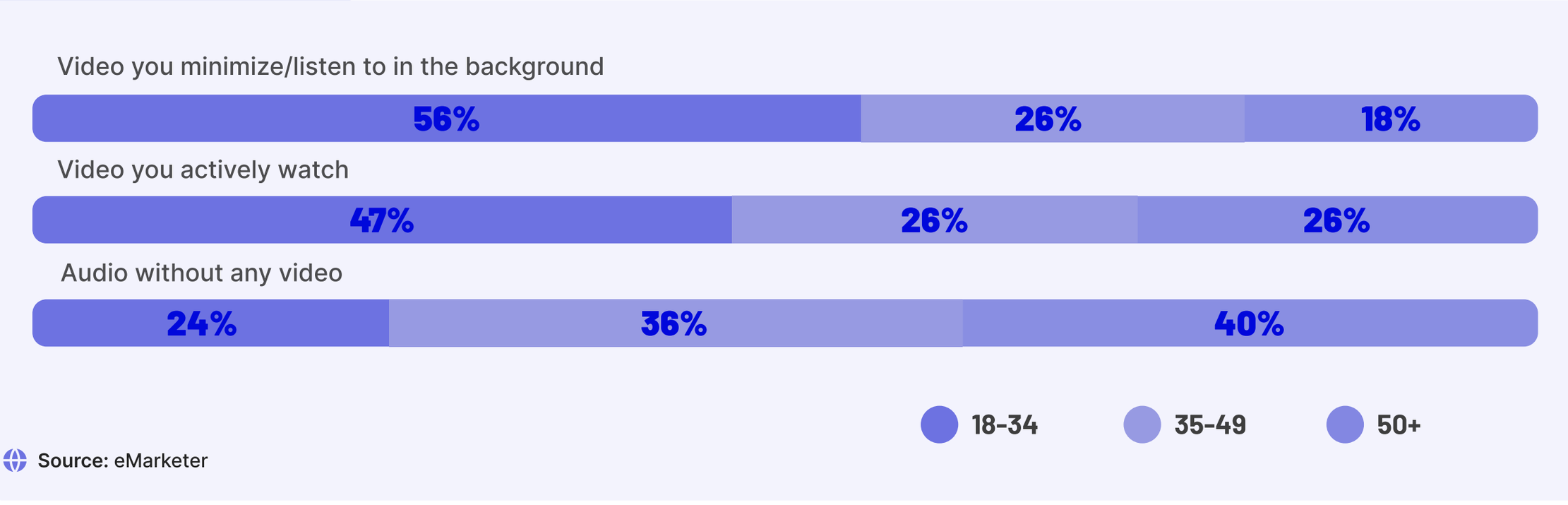
Podcasts are redefining how people engage with audio and transforming passive listening into premium, visual-first media.
U.S. adults continue to spend 2 hr 45 mins daily with audio, with digital audio alone accounting for 1 hr 25 mins; nearly matching time spent on social media. But accounts for >5% of ad budgets.

Younger audiences expect video

47% of 18-34s actively watch video podcasts, making video capability essential for reaching Gen Z and millennials.



Adults under 35 prefer podcasts with video-even if they don't watch it



Source: eMarketer

TREND 10:
AUDIO + PODCASTS: FROM BACKGROUND NOISE TO UNTAPPED PRIME MEDIA

AUDIO ISN'T DISAPPEARING – IT'S EVOLVING INTO VIDEO PODCASTS

YouTube's audio dominance
53% of podcast consumers prefer YouTube and captures 13% of all audio listening time, forcing pure-play audio platforms to adapt to video-first.

Netflix enters the game
2026 partnership with Spotify to host video podcasts signals mainstream adoption beyond audio platforms

70% listeners exposed to podcast ads recall the brand

79% respond positively to brand engaged in community

52% trust host-read recommendations

37% say ads feel interesting and authentic

6.3h
weekly podcast consumption per listener

20m.+
vs. 2024 and 44% are spending even more time

42%
of U.S. adults prefer watching podcasts over just listening

33%
less than two years ago

88%
of podcast listeners have taken action after hearing an ad

22%
made an immediate purchase

TREND 10:
AUDIO + PODCASTS: FROM BACKGROUND NOISE TO UNTAPPED PRIME MEDIA

THE TECH STACK IS CATCHING UP AND BRANDS MUST MOVE FAST

AI, measurement, and retail innovation are transforming audio and podcasts from engagement channels into performance drivers.

WHAT SUCCESS LOOKS LIKE

+10 pts
Brand awareness

70%
Brand recall

88%
Action rate

NEW CAPABILITIES ARE UNLOCKING SCALE

STREAMING IS NOW TRACKABLE

30% programmatic penetration expected in 2025 (up from 15% in 2019). Platforms like Spotify and Pandora now enable CTV-style attribution and QR/UTM tracking for unified cross-device measurement.

AI-POWERED BRAND SAFETY

AI tools now do sentiment scoring, topic exclusion, and contextual alignment to prevent ads from appearing in unsafe content without limiting reach. IAS and Spotify's AI classify content across 90+ languages, enabling real-time, brand-safe personalization.

RETAIL MEDIA ENTERS AUDIO

Retail media networks (Walmart, Lowe's, CVS) are expanding into programmatic audio, connecting first-party shopper data with dynamic audio formats.

WHAT BRANDS MUST DO NOW

PRIORITIZE VIDEO PODCASTS

Integrate video podcast sponsorships with host-reads and cross-screen storytelling. Use trackable formats to test attribution and view-through performance across Spotify, YouTube, and CTV.

ACTIVATE PROGRAMMATIC AUDIO

Launch programmatic pilots using AI sentiment and contextual data for precision targeting. Integrate audio data into MMM models to quantify its role in full-funnel lift.

TEST SHOPPABLE AUDIO

Pilot with shoppable podcast formats (QR, "add-to-cart," "buy-now" audio tags). Leverage retail data to bridge awareness with conversion and close attribution loops.

Source: eMarketer, WARC, IAS/Spotify announcement (May 6, 2025)

KEY TAKEAWAYS

HOW TO BE ‘ON TREND’ IN 2026

HOW TO BE ‘ON TREND’ IN 2026

AI – FROM TOOL TO OPERATING SYSTEM

KEY TAKEAWAYS	AI DIGITAL SOLUTIONS
AI Search collapses multi-touch journeys into single conversations where only credible, visible brands make the recommendation set. Marketers must evolve beyond traditional SEO and last-click metrics to stay findable.	**AI Digital strengthens upper-funnel visibility and brand authority so consumers initiate branded conversations instead of generic queries. We measure impact through attention scores, branded search lift, and brand-lift studies – keeping brands visible as conversions shift to AI-driven conversations.**
Voice is the primary interface for an always-on multimodal ecosystem where discovery and action happen in real time. As Gen-AI personalizes touchpoints, voice connects devices and surfaces. Brands securing voice presence now through conversational endpoints and voice-activated CTAs will control future customer access as the voice commerce market accelerates.	**AI Digital provides agnostic access to voice-triggering channels across CTV, audio, and DOOH. We deploy test-and-learn strategies to identify where voice drives the highest impact, implement voice-prompt CTAs that accelerate conversions, and build awareness campaigns that keep your brand present in AI-driven conversations and voice assistant responses.**
AI-driven campaigns now run on input quality, not manual optimization. Success requires clear objectives, clean signals, fast creative refresh, and smart guardrails. Performance depends on variant velocity, winner scale, and context-fit creative that reduces fatigue while sustaining attention and recall.	**AI Digital defines objectives and guardrails, audits signal quality, stands up DCO systems with weekly refresh cadences – scaling winners automatically, and setting frequency policies that platforms execute. Tracking winner share of spend and attention quality to ensure campaigns stay fresh, relevant, and effective without manual intervention.**

THE CREDIBILITY ECONOMY

KEY TAKEAWAYS

Transparency has shifted from competitive advantage to mandatory standard. As log-level verification becomes required, marketers must adopt zero-tolerance fraud policies or face significant waste. Brands embracing transparency see improved viewability, ROAS, and client retention while protecting investments.

The shift toward owned data is structural, not cyclical. By 2026, brands that control, unify, and activate their first-party data ecosystems will be the only ones able to deliver performance at scale. The competitive advantage is no longer volume of data—it's ownership of it.

Privacy is fundamentally redefining how digital advertising works – shifting the industry from pervasive tracking to permissioned, context-driven experiences. The brands who win in 2026 will be those who deliver personalization without intrusion. Privacy-first design is no longer table stakes—it’s a performance driver.

AI DIGITAL SOLUTIONS

AI Digital deploys AI-driven fraud detection and third-party verification to ensure a zero-tolerance IVT policy. We are able to provide log-level data dashboards for full visibility into media buys and spend to protect ROI through verified, brand-safe media.

AI Digital operationalizes first-party data by connecting CRM, CDP, clean rooms, and activation platforms into a unified performance engine. We maximize owned and partner data value through precision modeling, predictive targeting, and privacy-safe optimization across programmatic, measurement, and data science.

AI Digital enables clients to thrive in a privacy-first landscape by designing compliant identity frameworks, activating first-party audiences, and deploying contextual and clean-room-powered strategies. Our measurement, modeling, and optimization systems are built to perform without reliance on third-party identifiers.

THE NEXT-GEN MEDIA MIX

KEY TAKEAWAYS	AI DIGITAL SOLUTIONS
AdTech consolidation is reshaping media as platforms merge to control demand, supply, and data. Single-ecosystem buying reduces reach, limits attribution, and raises costs. As walls rise, advertisers face reduced leverage and fewer optimization pathways. Success requires diversified partnerships, multi-platform AI optimization, and supply path efficiency.	**AI Digital's Open Garden framework diversifies demand partnerships to maximize reach and attribution flexibility, deploys AI-driven bidding across multiple platforms to preserve control and performance visibility, and optimizes supply paths to eliminate intermediaries and reduce fees. Our platform-agnostic approach preserves negotiating leverage and strategic flexibility as consolidation accelerates.**
CTV has evolved from emerging channel to essential media pillar, with live sports and local advertising driving unprecedented growth. Yet fragmentation creates challenges as marketers struggle to achieve adequate visibility while consumers churn across platforms. Success requires shifting from siloed platform tactics to unified, cross-platform orchestration that delivers simultaneous scale and precision.	**AI Digital's Open Garden Approach unifies fragmented CTV through platform-agnostic strategy, programmatic excellence, and advanced measurement including MMM and cross-device tracking. We deploy interactive formats, optimize for live sports and local opportunities, and bridge traditional TV's mass reach with digital's precision targeting.**
Retail Media Networks have evolved into essential full-funnel ecosystems, yet fragmentation persists as Amazon dominates 80% of retail search. As agentic AI revolutionizes commerce, autonomous agents will shop for consumers by 2030. Success requires shifting from product-centric to outcome-based thinking and preparing for AI-driven purchase dynamics.	**AI Digital's retailer neutral approach leverages AI-powered advertising across multiple retail networks without vendor lock-in. Our full-funnel strategy combines retail CTV for awareness with optimized on-site and off-site channels, unified through omnichannel integration of in-store, social, and first-party retail data.**
Audio has evolved into a high-intent, video-driven ecosystem where consumer attention far outpaces ad spend. With podcasts surging and video reshaping discovery, this creates a rare underinvested white space. Marketers treating audio as a premium, multi-format channel will gain disproportionate advantage.	**AI Digital activates programmatic audio with smarter signals, brand-safe placements, and adaptive creative. We target high-attention moments across streaming, podcasts, and video formats, then connect exposure to cross-device actions for confident scale.**

KEY TAKEAWAYS

CONCLUSION

CONCLUSION

UNLOCKING SUCCESS IN 2026

In 2026, accepting that the governing rules of advertising are changing and mastering the new gatekeepers to success are the combination. AI has moved from enhancement tool to operating system. Credibility has replaced reach as the currency of brand value. Premium channels – once considered expensive insurance – now deliver the only measurable, scalable impact that matters.

The opening of this report asked a defining question: **"Where should we be that our competitors aren't?"** The answer determines everything. Brands still asking, “How much should we spend?” will continue optimizing budgets around saturated channels, fighting over the same audiences with incrementally better tactics. Brands asking “Where should we be?” are already moving.

THREE IMPERATIVES WILL SEPARATE WINNERS FROM THE REST:

- **Optimize for AI, not algorithms**
If your brand isn't surfaced in AI-generated responses, you don't exist in the consideration set. If you aren’t leveraging AI automation, you’re wasting
- **Treat credibility as infrastructure, not messaging**
Transparency, fraud prevention, and first-party data aren't compliance checkboxes. They're the foundation of sustainable competitive advantage. Brands that build these systems in 2026 will compound their gains in 2027. Those that don’t will struggle to catch up.
- **Enter emerging channels early**
CTV, retail media, audio, and voice are no longer "test budgets." They're where attention is flowing, attribution is closing, and competitors are still underinvested. Early movers secure inventory, build institutional knowledge, and capture disproportionate returns before saturation.

MOVING AT THE SPEED OF OPPORTUNITY

History shows that media channel advantages compress quickly. AI Search reached $1B in four years – faster than any channel in digital advertising history. Retail media is approaching $69B with full-funnel capabilities most brands haven't activated. CTV time spent will overtake linear TV this year, yet many advertisers still treat it as experimental.

The opportunity isn't permanent. It's provisional. And it rewards speed.

AI DIGITAL'S ROLE IN 2026 AND BEYOND

Our mission has always been to help brands see around corners before the industry shifts beneath them. This report isn't a prediction – it's a strategic map for navigating transformation that's already underway.

Through platform-agnostic programmatic excellence, retail-neutral media strategies, and AI-powered automation that serves your outcomes, we help you move faster than consensus, smarter than competition, and earlier than saturation.

THE QUESTION ISN'T WHETHER 2026 WILL REDEFINE ADVERTISING. IT ALREADY HAS. THE QUESTION IS: WILL YOUR STRATEGY REFLECT THAT REALITY – OR REACT TO IT AFTER YOUR COMPETITORS HAVE MOVED?

ABOUT AI DIGITAL

AI DIGITAL IS AN AI-NATIVE MEDIA CONSULTANCY HELPING AGENCIES AND BRANDS PLAN, OPTIMIZE, AND MEASURE MEDIA WITH SPEED AND PRECISION.

Through our Open Garden approach and AI Digital Labs - our innovation and consulting arm, we fuse AI with human expertise to unlock smarter, faster, and more accountable outcomes.

We meet clients where they are and help them move fast, whether they're navigating fragmented platforms, breaking free from walled gardens, or operationalizing AI for real-world results.
No bias. No Black Boxes. Just performance.

WHY CLIENTS CHOOSE AI DIGITAL

- AI-ENHANCED PLANNING AND FORECASTING IN UNDER 30 SECONDS
- CUSTOM KPI ENGINE + PROPRIETARY METRICS LIKE ATTENTION SCORE AND ACCOUNTABILITY SCORE
- 99.9% PREMIUM SUPPLY ACCESS, NO DSP BIAS
- REAL-TIME OPTIMIZATION POWERED BY MACHINE LEARNING AND EXPERT OVERSIGHT
- DEDICATED CONSULTING TO FUTURE-PROOF YOUR AI READINESS

WE DON'T JUST PROMISE AI TRANSFORMATION
WE DELIVER IT

WE DON'T REPLACE EXPERTISE
WE AMPLIFY IT

FOR MORE INFORMATION CONTACT US
AT AIDIGITAL.COM/GET-IN-TOUCH

AIDIGITAL