

Basis[®]

2026 TRENDS

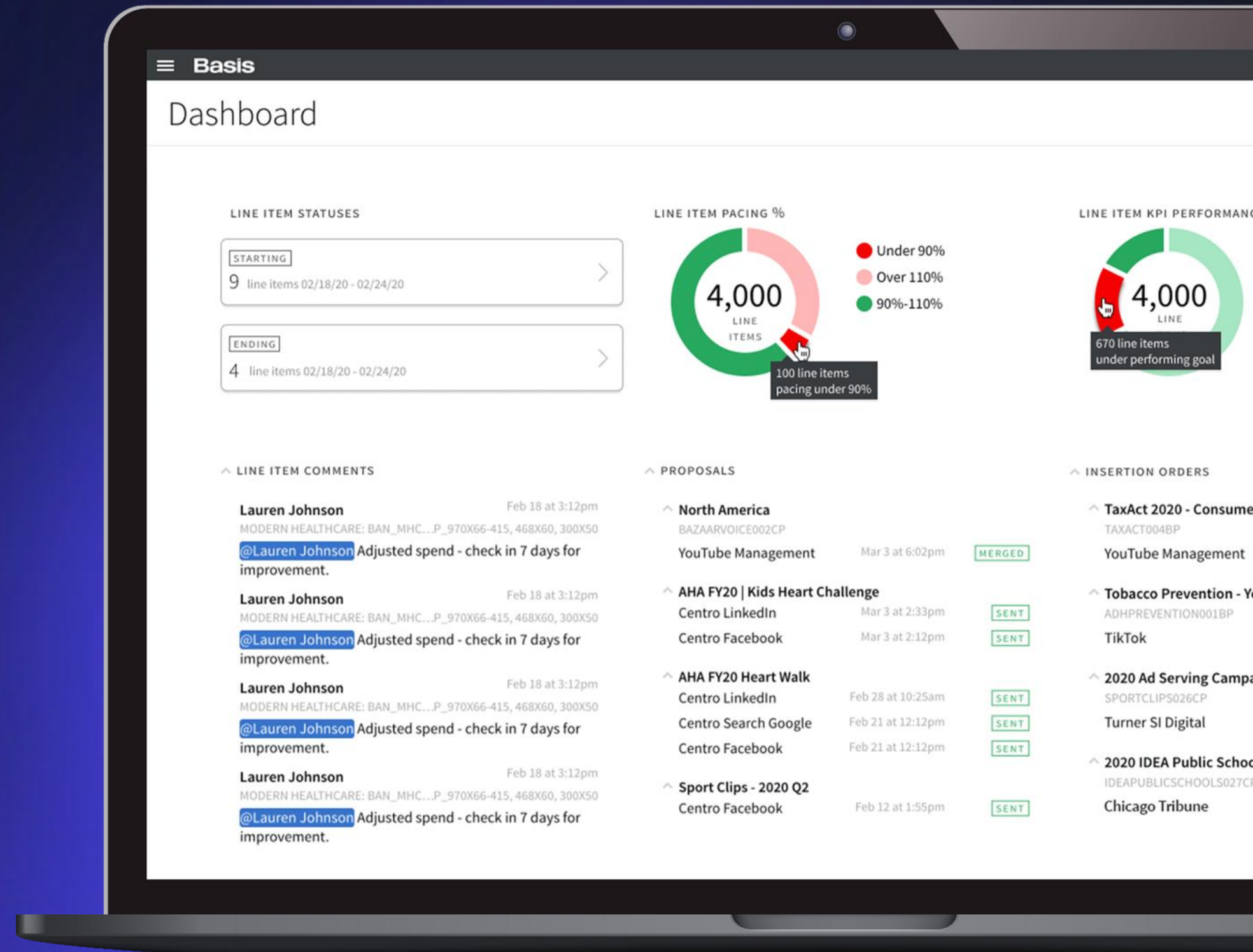
Rewinding to *Fast Forward*

Translating persistent trends into meaningful strategies
that meet the demands of the present media landscape.





The industry's **most comprehensive** and **automated** digital media platform.



A lot's been going on



◀▶ Nielsen

News Center >

**Streaming Reaches Historic TV Milestone,
Eclipses Combined Broadcast and Cable
Viewing For First Time**



Future fixation has created a move-on mentality



◀▶ Nielsen

News Center >

**Streaming Reaches Historic TV Milestone,
Eclipses Combined Broadcast and Cable
Viewing For First Time**



BUT FIRST

Advertisers need a moment to rewind

PRESENT TENSE, ACTIVE

Revisit

Where was progress made?
What next steps are needed?
Was new information discovered?

PAST TENSE, RETROSPECTIVE

Reflect

What did we learn?
What would we do differently?
How imperative is change?

AGENDA

In 2026, Let's Evaluate The Following

The Quality
Quandary

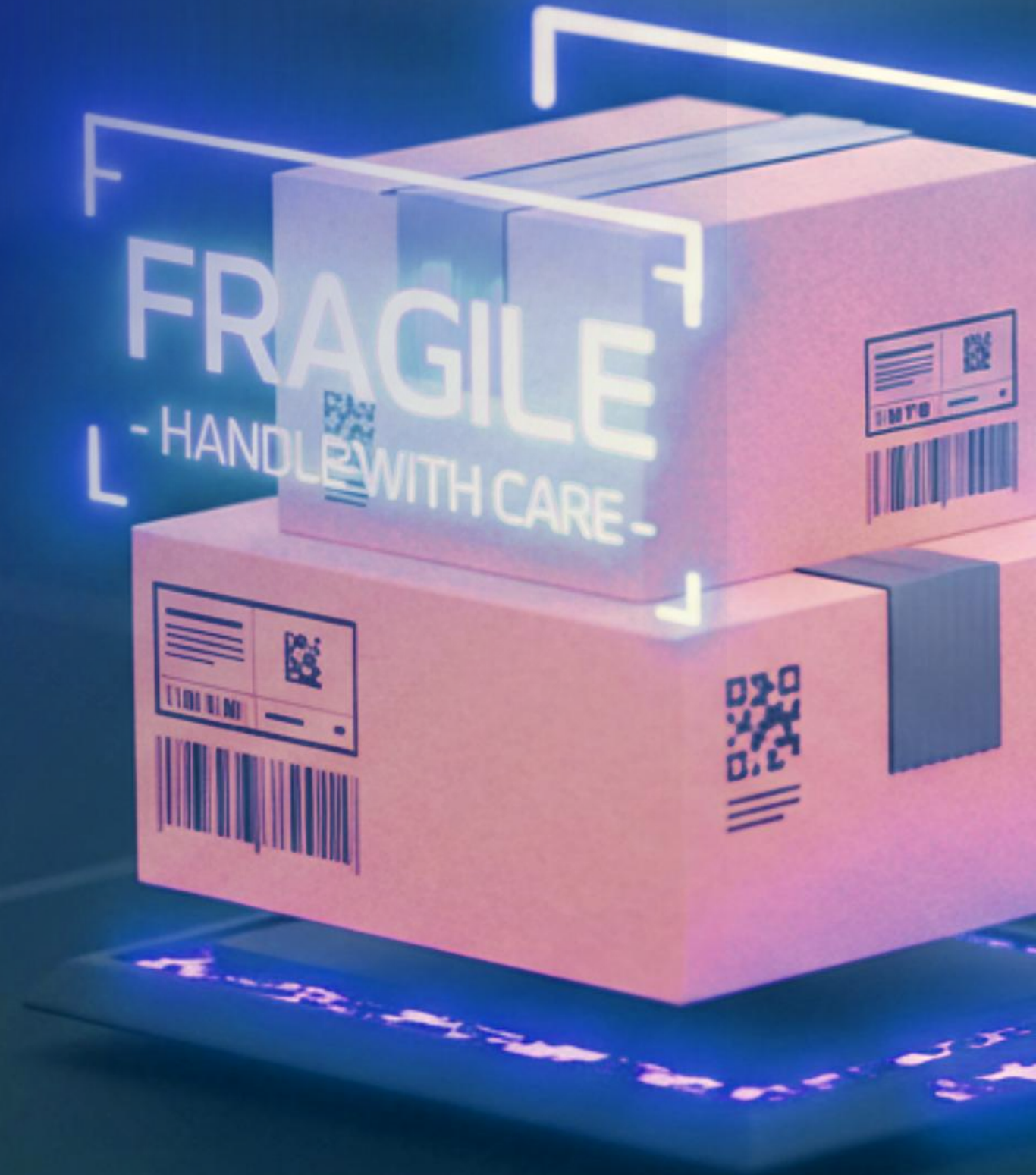
Streaming
TV's Inequity

Agents of
Chaos

Brand
Immunity

The Quality Quandary

How focusing on performance over ownership of supply path quality weakens outcomes





MEDIA QUALITY

PREDICTION:

Buyers will continue
shouldering responsibility
for media quality

WHERE WE'VE BEEN

We've filtered for our desired quality controls

Model year

☐ 2025 (137)

☐ 2024 (47)

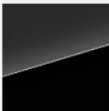
☐ 2023 (108)

☐ 2022 (62)


☐ 2021 (14)

Show all years

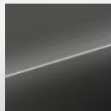
Exterior paint




Black



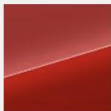
White



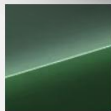
Grey



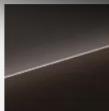
Blue




Red




Green




Brown



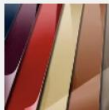
Yellow



Beige



Orange





Other

GO-TO GATEKEEPERS
OF QUALITY

IDV
DoubleVerify

IAS


HUMAN

 pixalate

9

Getting the maintenance report

Supply path optimization

creating the most efficient path to ad inventory, maximizing working media

WHY IT MATTERS

- Eliminates middlemen
- Cuts the “adtech tax”
- Removes bad actors
- Creates a healthier ecosystem

Misaligned incentives keep ad spend away from media

\$180 Billion

In US programmatic ad
spend in 2025

eMarketer

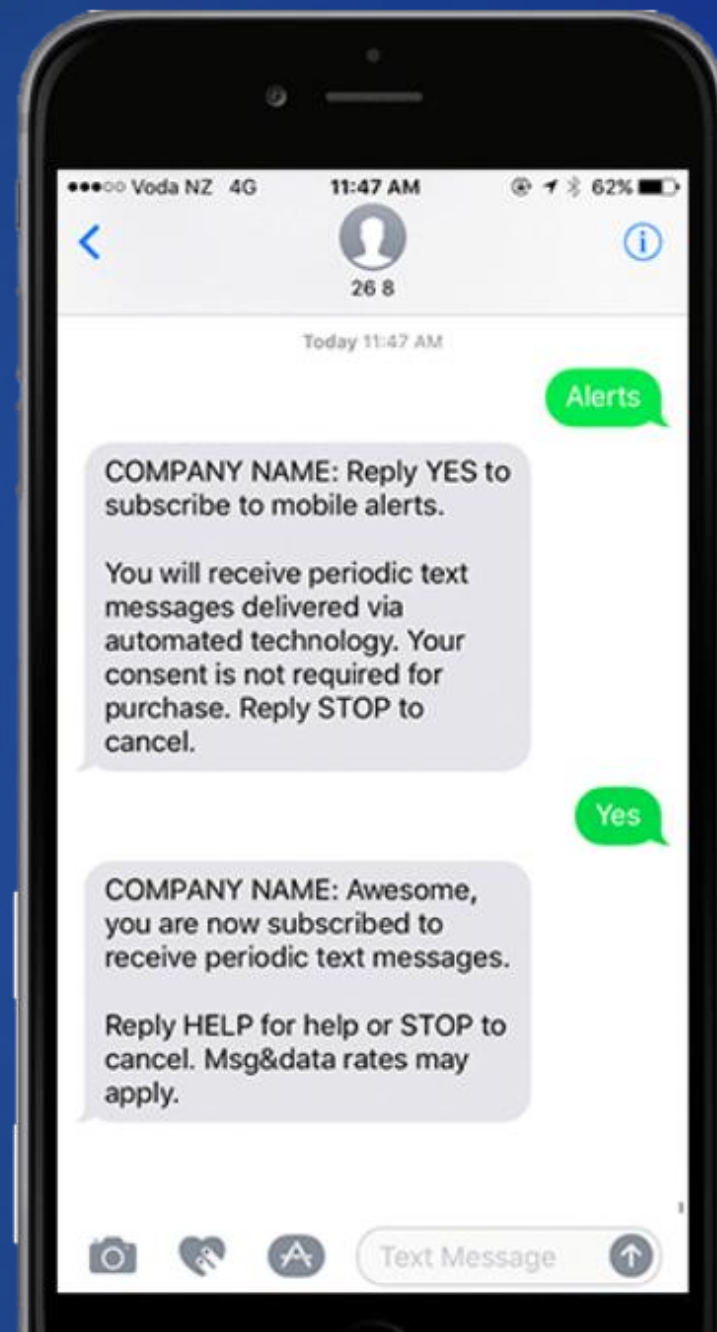
\$26.8 Billion

In global media value is lost
due to inefficiencies

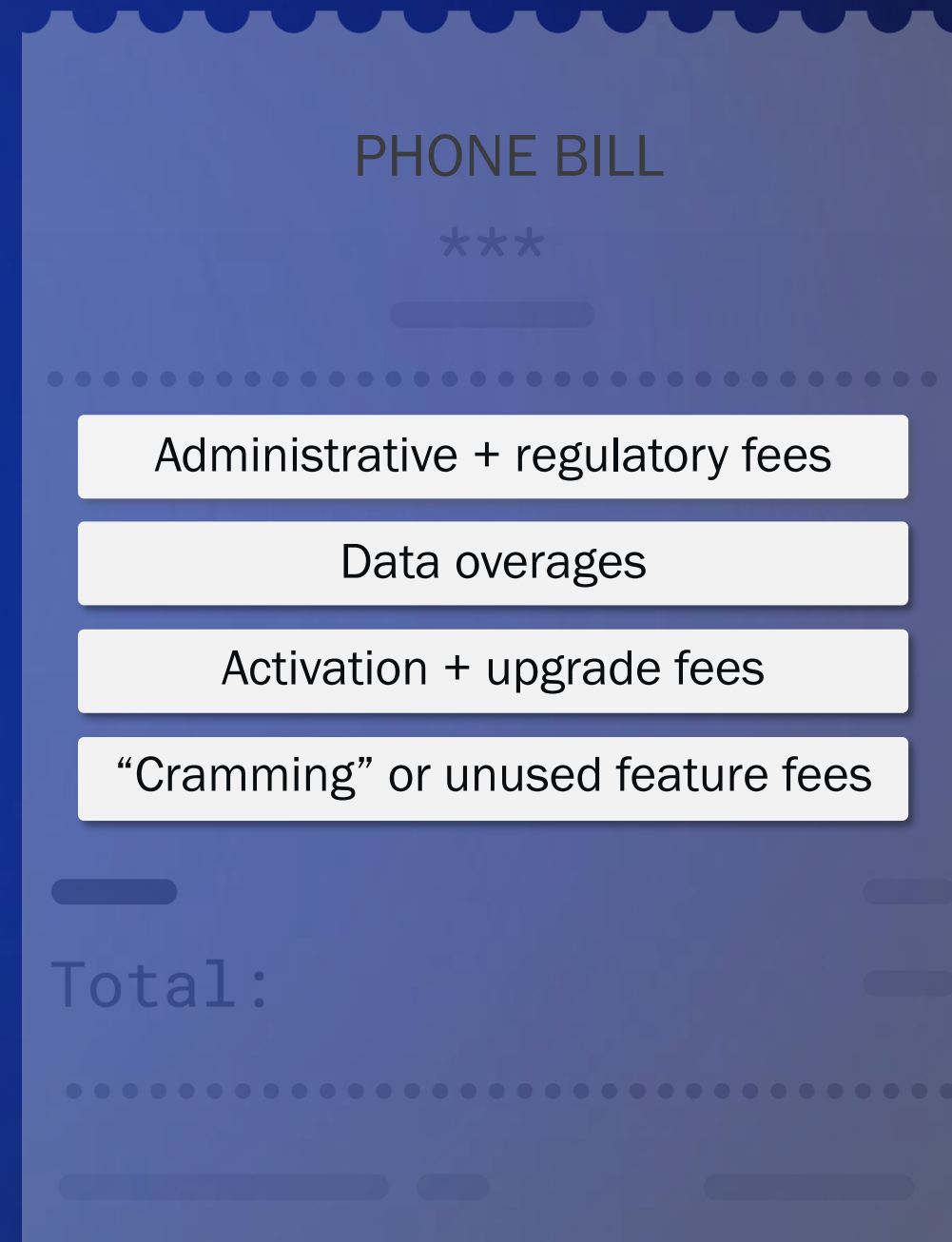
ANA

Some fees are opt-in, others are invisible

SMS Opt-In Notification



Phone Bill Hidden Fees



Working media can quickly disappear



Buyers are taking control – and taking on the burden

Applying 3 checkpoints to control where ad spend flows:



1

Dedicated SPO
Taskforce



2

Customized
buys



3

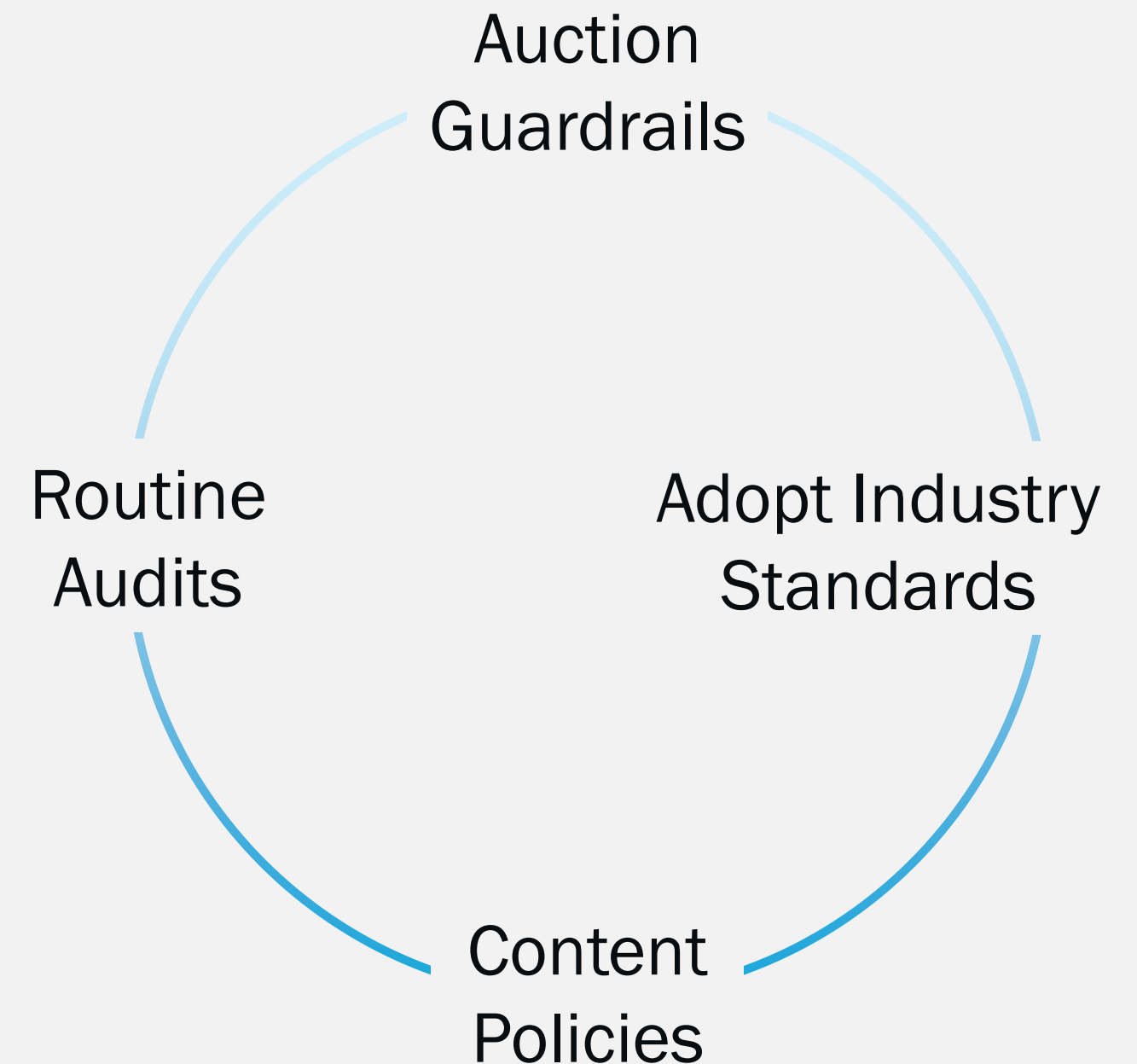
Data
optimization

Checkpoints to creating a cleaner supply path



1 Dedicated SPO Taskforce

Technical teams committed to ongoing maintenance of the supply path, removing inefficiencies



Checkpoints to creating a cleaner supply path

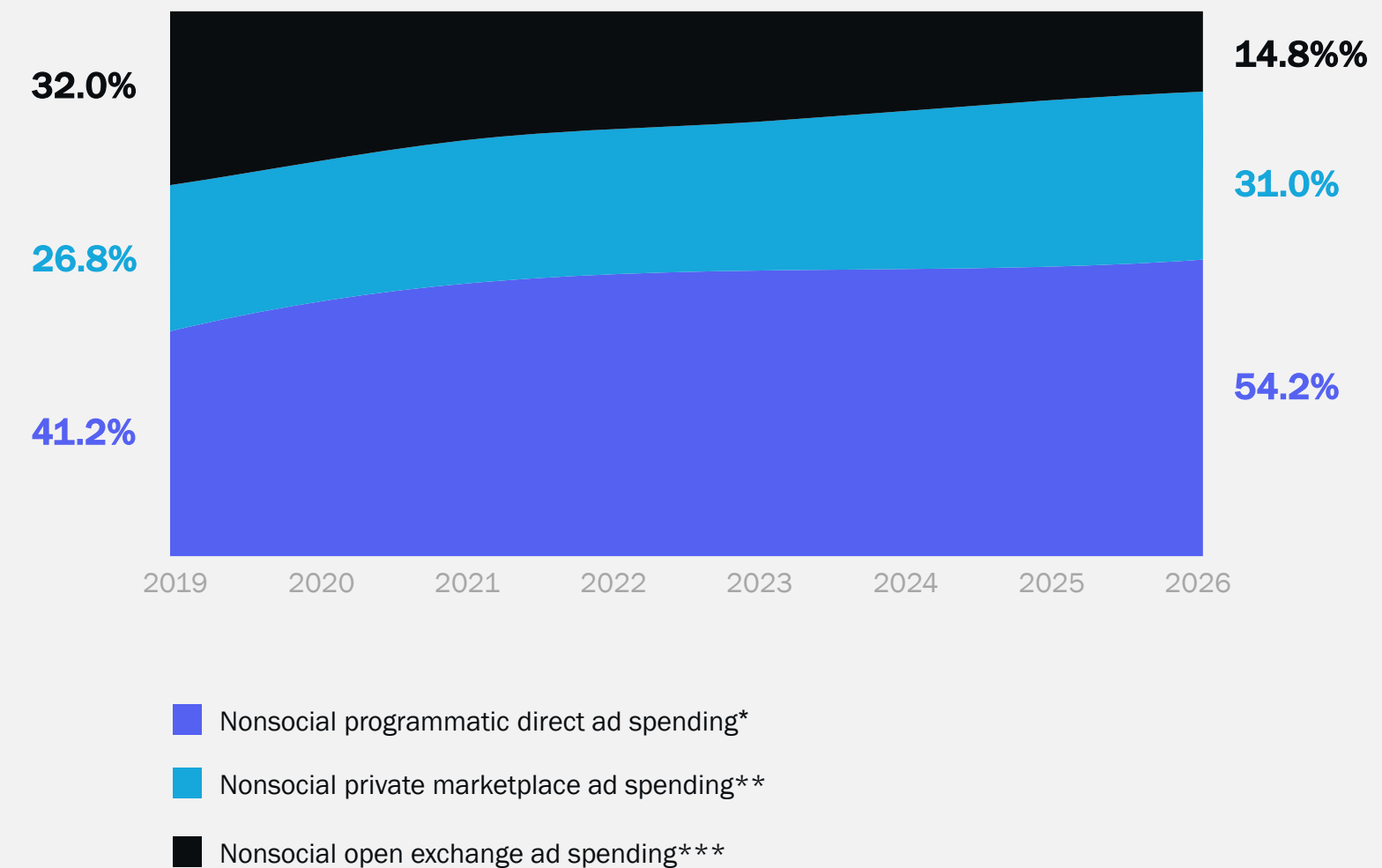


2 Customized Buys

Shifting buying strategies away from open market and into Private Marketplace, Programmatic Guaranteed, or *curated deals

Programmatic Direct Is Gaining Share of Nonsocial Programmatic Market Thanks to RMNs and CTV

% of US nonsocial programmatic display ad spending, by transaction method, 2019-2026

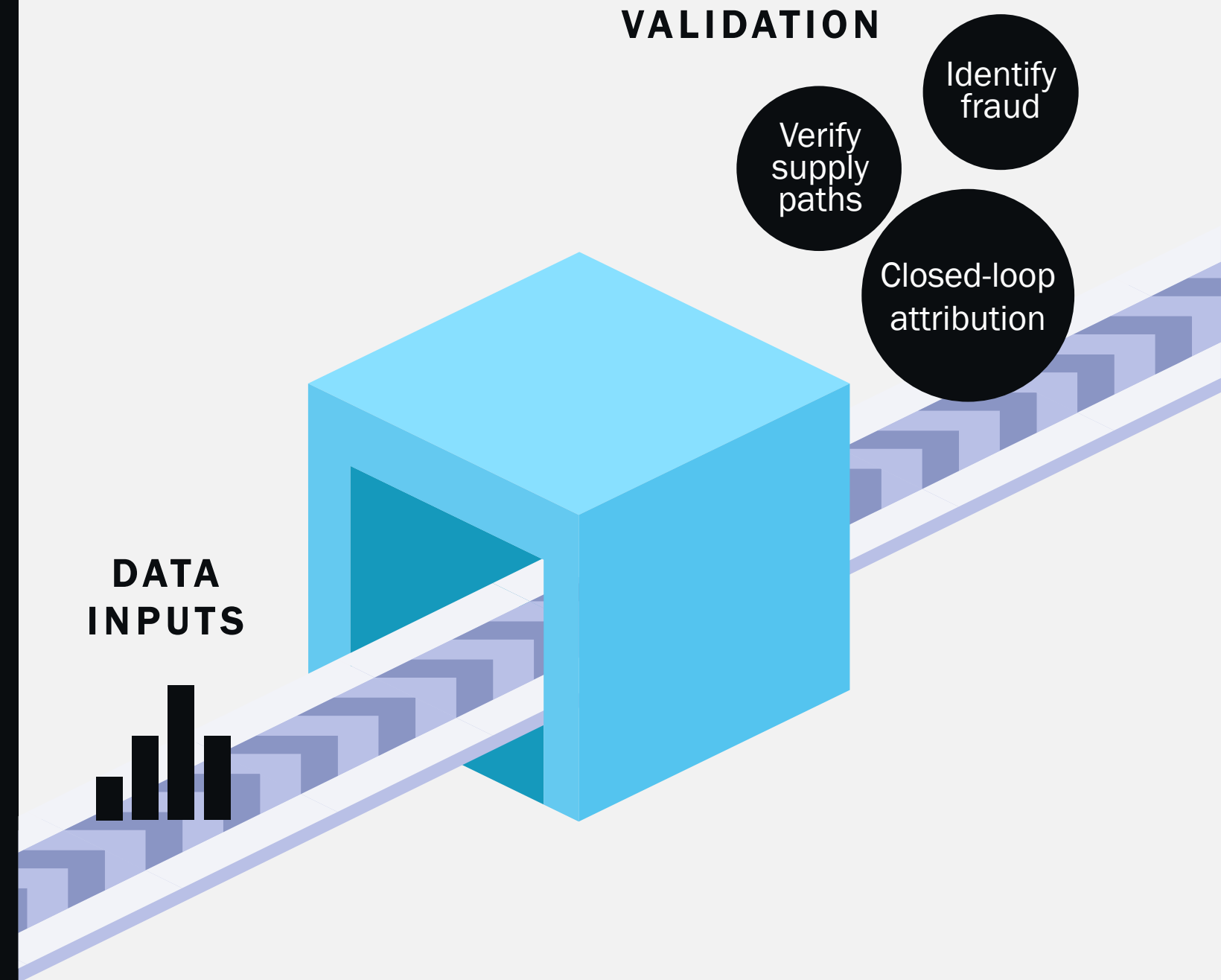


Checkpoints to creating a cleaner supply path



3 Data Optimization

Analyzing log files and/or using metadata to gain line of sight into auction dynamics and performance opportunities



Setting higher standards requires:

PARTNERS LAY THE GROUNDWORK FOR QUALITY

Some vendors pursue media quality as a foundational value leading to vetting of supply as an ongoing, dedicated effort

DEFINE YOUR STANDARDS OF QUALITY

Quality will be subjective based on the advertiser, campaign objective, and buying methodology. Advertisers will need to define standards unique to their requirements.

ADVERTISERS MUST PICK THEIR PRICE

Is this something you choose to care about and in what scenarios? What price are you willing to pay for any given campaign or campaign objective?



Streaming TV's Inequity

Adjusting strategies to move the
premium streaming opportunity
from pipedream to reality

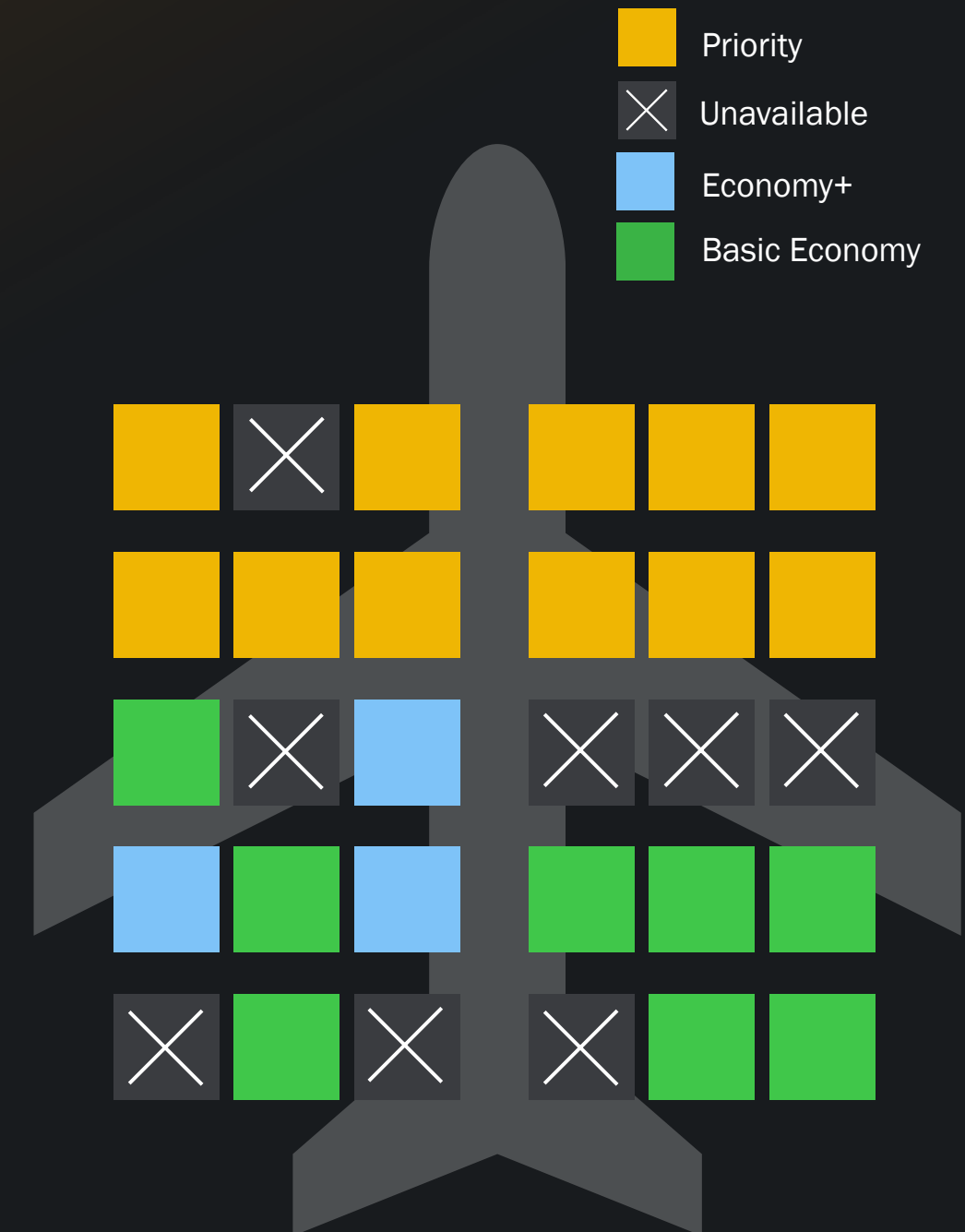


CTV

PREDICTION:

The streaming TV quality
gap will widen in 2026

All inventory is not created equal



Our expectations – and ad spend – are higher than ever

2020

Linear TV spend
captured **71% of budgets**

Advertisers spent
\$9.7 billion in CTV

2025

Linear TV spend
captured **42% of budgets**

Advertisers spent
\$26.6 billion in CTV

42%

Of advertisers said
content **quality** is a
top determinant for
where to invest



Marketers must pick up the controller

Platform



Inventory



Ad Formats

Creative



Data

Measurement



Craft your CTV strategies with specificity and care

Start

What is your **origin source** of inventory?
Align expectations accordingly

Inventory Customization

- Specific live sports, shows
- Family content → holiday family content

Audience Data Sources

- 1P data – advertiser
- 1P data – platform
- ACR data

Reporting Granularity

- Show level passback
- Log files

Measurement Methodology

- 3P vendor
- In-platform metrics or test set-up (ex: incrementality)

Close the premium streaming gap

ASSIGN LEADING ROLES

Some vendors pursue media quality as a foundational value leading to vetting of supply as an ongoing, dedicated effort

NO MORE BINGE BUYING

Quality will be subjective based on the advertiser, campaign objective, and buying methodology. Advertisers will need to define standards unique to their requirements.

REQUEST RECEIPTS

Is this something you choose to care about and in what scenarios? What price are you willing to pay for any given campaign or campaign objective?

Agents of Chaos

The bots are coming: how brands should address the promise and overpromise of agentic AI



Is this what we should aspire to?

“In the not-too-distant future, we want to get to a world where any business will be able to just tell us what objective they’re trying to achieve ... how much they’re willing to pay for each result, and connect their bank account *and then we just do the rest for them.*”

Mark Zuckerberg, June 2025



ARTIFICIAL INTELLIGENCE

PREDICTION:

Agentic AI will cross
the credibility
threshold by Q4 2026

Agentic AI will come to life...with some caveats

- Use cases that actually make sense will be limited
- Interoperability is a non-negotiable for agentic viability
- Human nature will shape the success of agentic solutions



Dressing up AI makes it more appetizing

OFF-THE-SHELF LLM



GEN AI PLATFORM



AI AGENT/ASSISTANT



WTF is Agentic AI?

Choose from the following:

- A. Autonomous systems capable of making decisions without human intervention using multi-step planning and complex reasoning
- B. Uses a blend of traditional and generative AI techniques
- C. A term used in marketing materials and press releases to pique interest + drive stocks up
- D. All of the above

Two versions of the internet will emerge



WEB #1

The human web: people open browsers or apps, type, tap, or talk for info, scroll feeds, shop within digital interfaces.

Two versions of the internet will emerge – and converge



WEB #2

The agentic web: AI agents interact with digital interfaces, rely on APIs and other agents to get things done

PAID MEDIA OPPORTUNITIES



The Human Web

Branding

Relationships

Experiences

OPERATIONAL OPPORTUNITIES



The Agentic Web

Inference

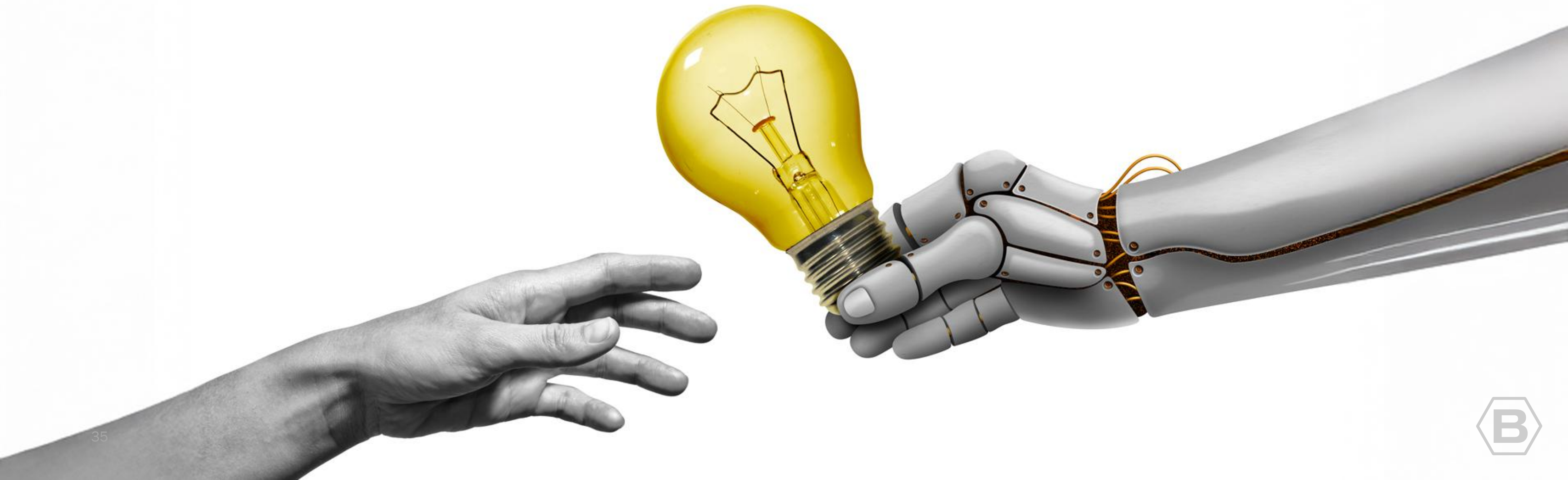
Automation

Optimization

THE VALUE PROPOSITION

“Agents don’t replace human judgment. They remove human limits.
So, what can you now execute faster, **smarter**, and at scale?”

- Joseph Hirsch, CEO, Swivel via AdTech Explained



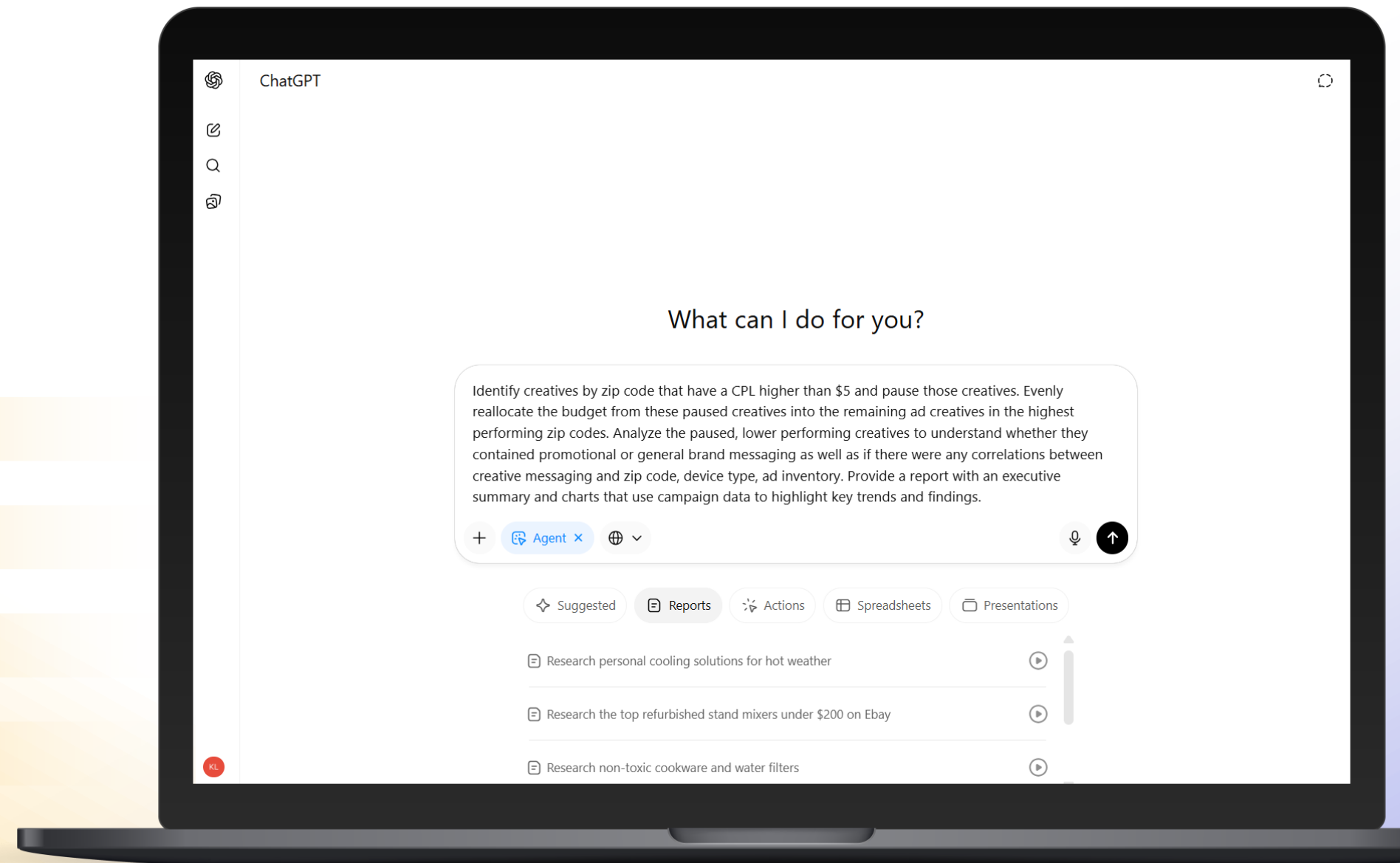
Agentic AI's most valuable roles are invisible

MEDIA QUALITY

AD OPERATIONS

FRAUD DETECTION

OPTIMIZATION + INSIGHT



Best practices for agents

What tasks or workflow components can be legitimately managed by an agent?

Is the AI Agent able to complete a dedicated task more effectively than a human?

How will use of agents be standardized across your media workflows? How is success being measured?

Brand Immunity

Prioritizing community building insulates brands against cultural and technological volatility



bobbie.



Glossier.



BRAND

PREDICTION:

Brands won't target
audiences, they'll
develop communities

COMMUNITY IS CRITICAL FOR BRANDS

“They’re burning all the witches even if you aren’t one”

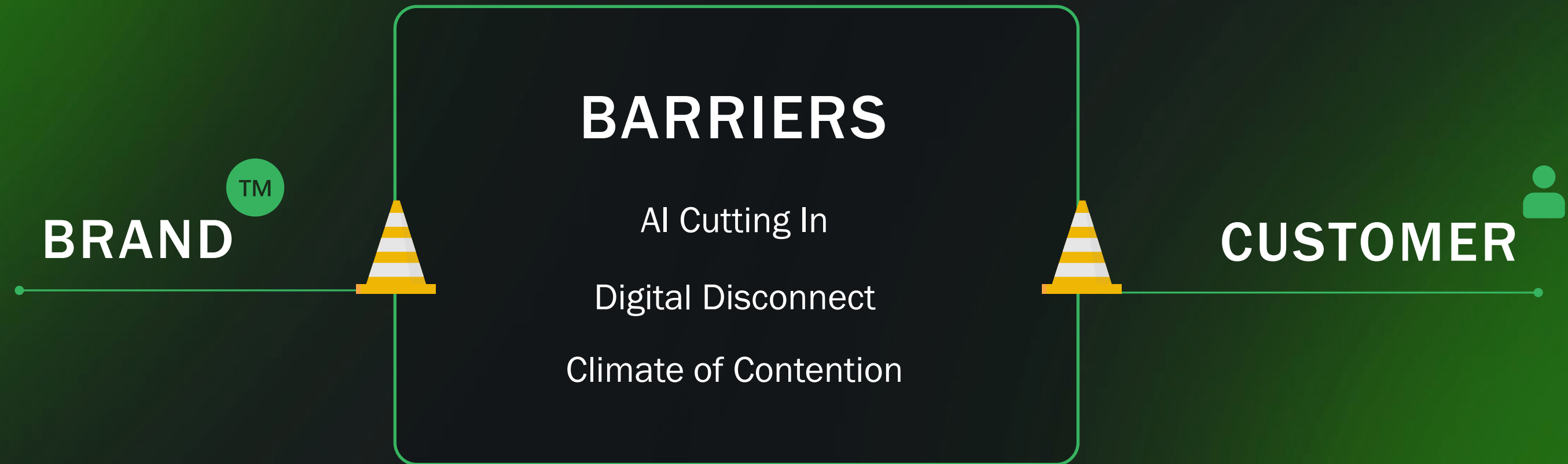


DISTRUST IS THE DEFAULT

71%

of consumers said they
trust brands less today
than they did a year ago

Relationships insulate brands from distrust + disruption

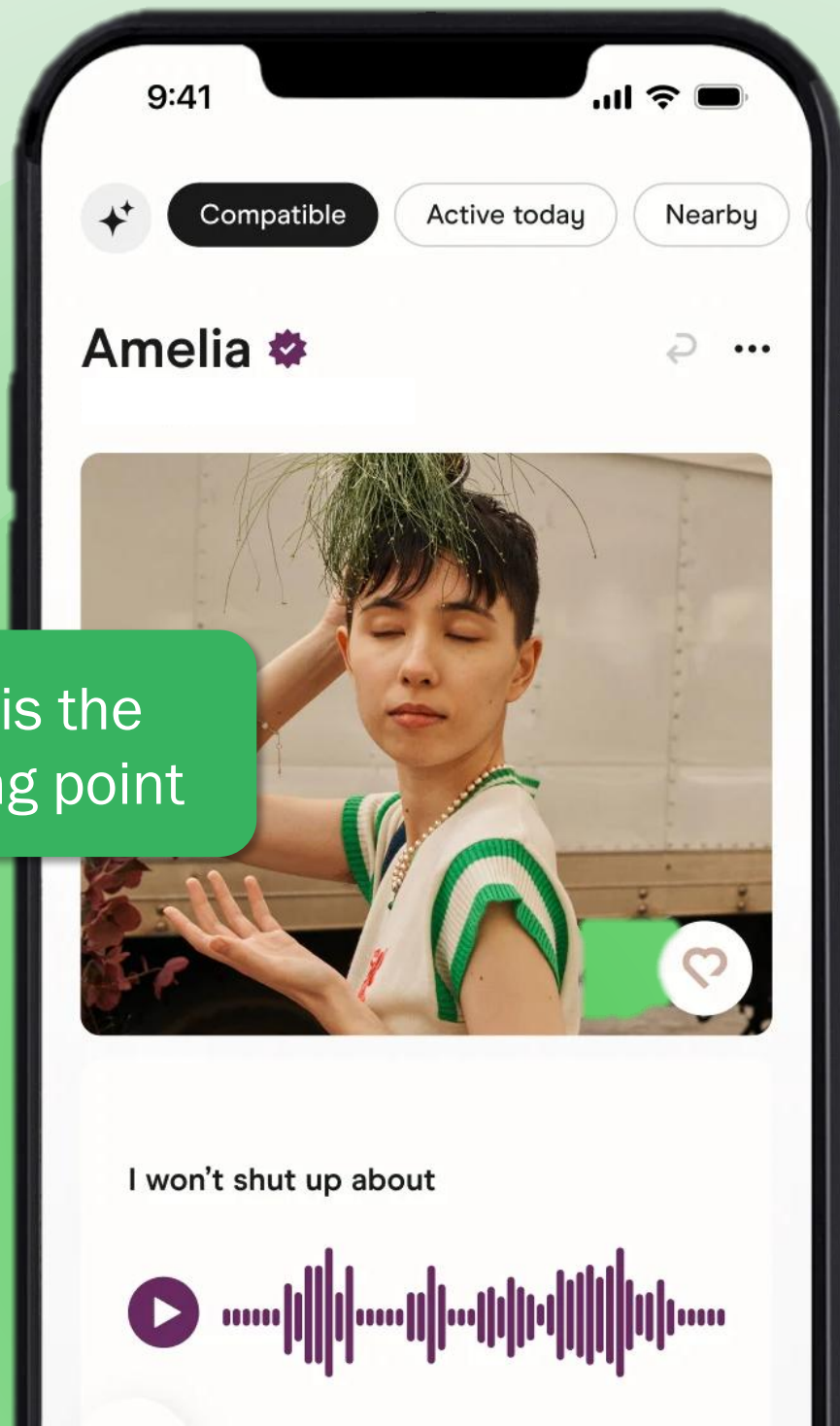


RELATIONSHIPS PRECEDE COMMUNITY

Relationships insulate brands from disruption

BRANDTM — CUSTOMER

Relationship building is hard work



This is the
starting point

Initiative

*I'd love to get dinner with you –
are you free Friday night?*

Intention



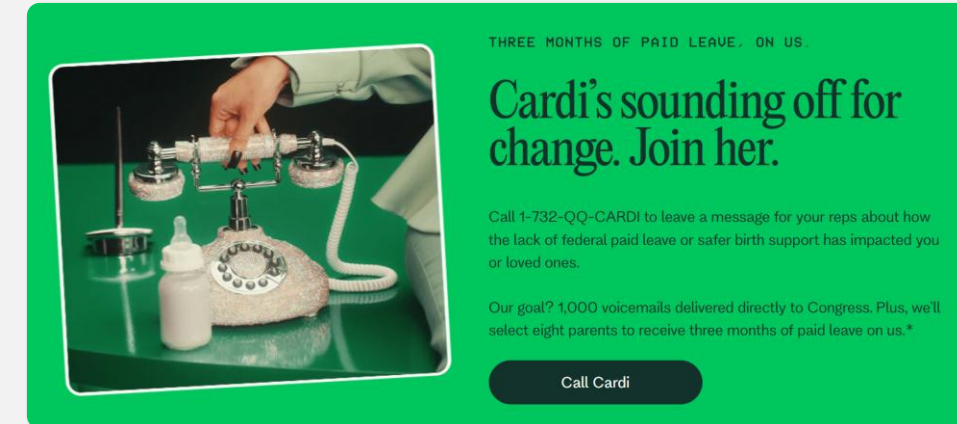
Investment



RELATIONSHIPS PRECEDE COMMUNITY

Relationship building is hard work

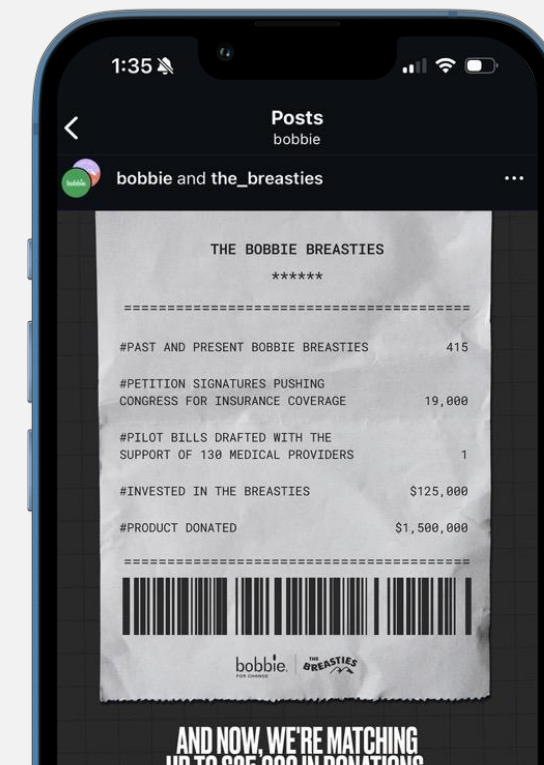
Initiative



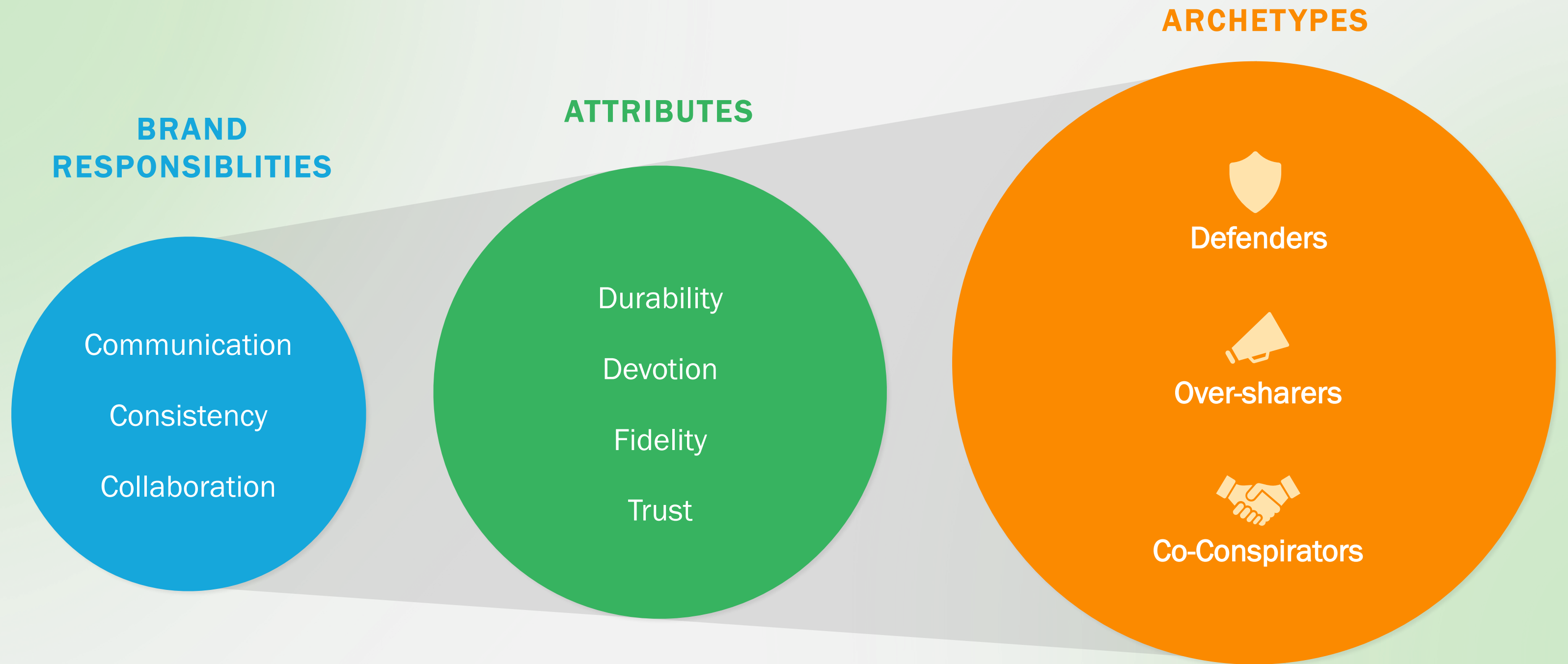
Intention

"It appealed to the leadership team because it centered on real consumers, giving Bobbie a way to recognize and engage its community".

Investment



Creating a community of ride or dies



WHERE COMMUNITY HAPPENS TODAY

Where brands gain and grow communities

ENTER THE CHAT

Engage in conversations

GET REAL

Establish tangible presence

GAIN RELEVANCE

Lean into contextual AI



SEEDTAG

gumgum

Expectations are higher than ever. Brands can fulfill them.

It has become *more important*
for brands in my life to:

76% Give me optimism

75% Help me do good

74% Make me feel good

73% Provide me with community

71% Teach and educate me

How brands can build immunity

1

Identify where
community can be
established & cultivated

2

Community is relational,
people connect with people

3

Paid media isn't just
a conversion tool, it's
a connection tool



The future we
were promised is
today's present
reality...*how did
we do?*

REPORT CARD

Promised Opportunity	Grade
METaverse/VIRTUAL REALITY	F
COOKIELESS ADDRESSABILITY	B-
MEASUREMENT + ATTRIBUTION	B
PREMIUM CTV	A-
ADVANCED AI	B

Achieving forward motion

DON'T FAST FORWARD TO THE FUTURE

Lay the groundwork for comprehensive media strategies that incorporate the demands and opportunities of the present landscape.

INTEGRATE SPECIFICITY INTO YOUR STRATEGIES

Tailor each component of your investment to maximize its impact. Drilling down into certain inventory in CTV, avoiding using the same creative across different markets, etc.

ASSIGN VALUE TO MEDIA QUALITY

Individual teams will need to decide where they stand on media quality. Determine if existing safeguards are enough, run performance tests, assess opt-in vs hidden fees.

GIVE INVESTMENTS PURPOSE BEYOND CONVERSION

In an era where AI increasingly puts a synthetic sheen on our media consumption, seek out spaces where media can facilitate authentic, tangible brand connections.

Download the full Trends Report



www.basis.com/2026TrendsReport

