

# Basis®

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2026 TRENDS

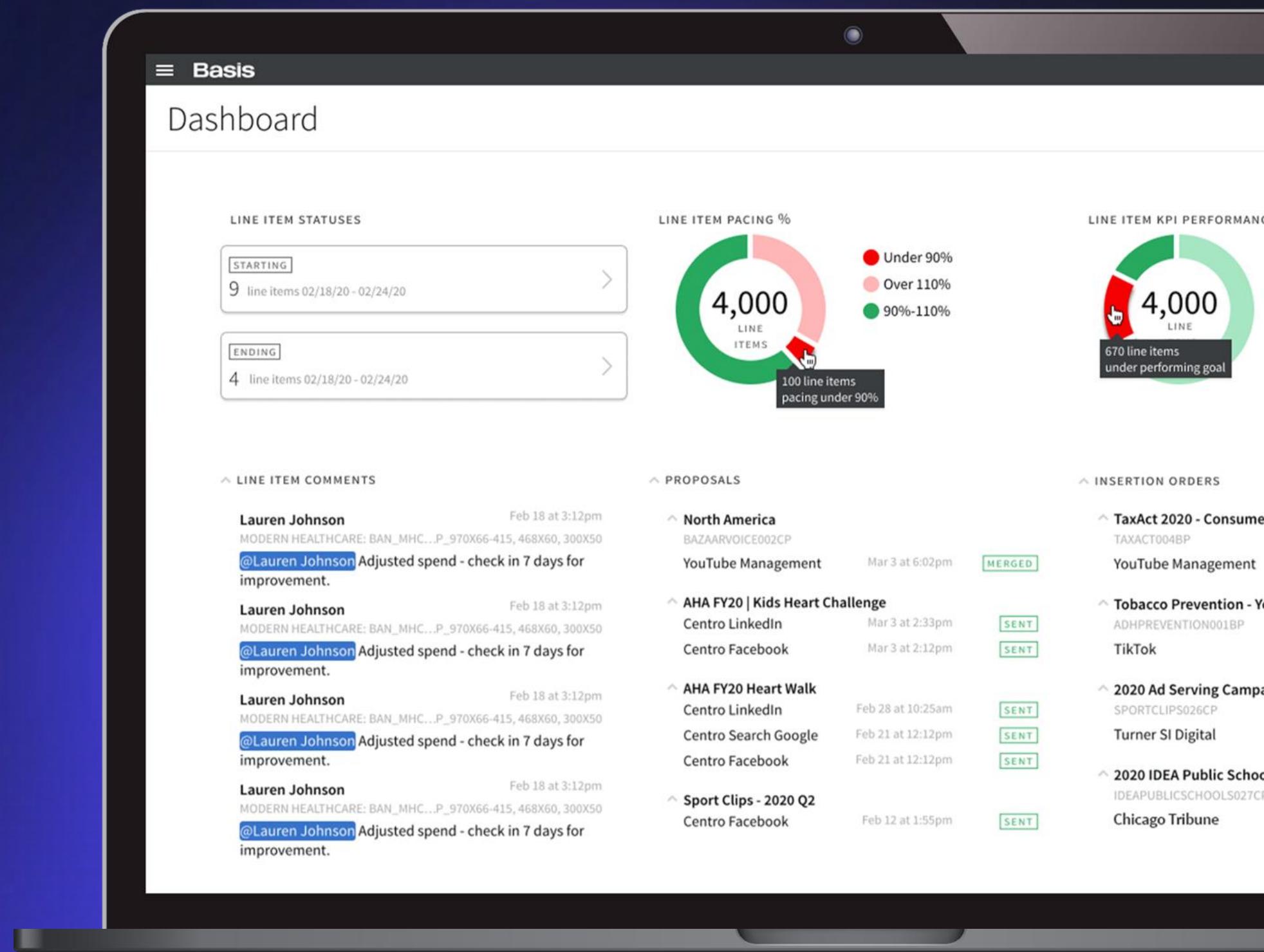
## Rewinding to *Fast Forward*

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

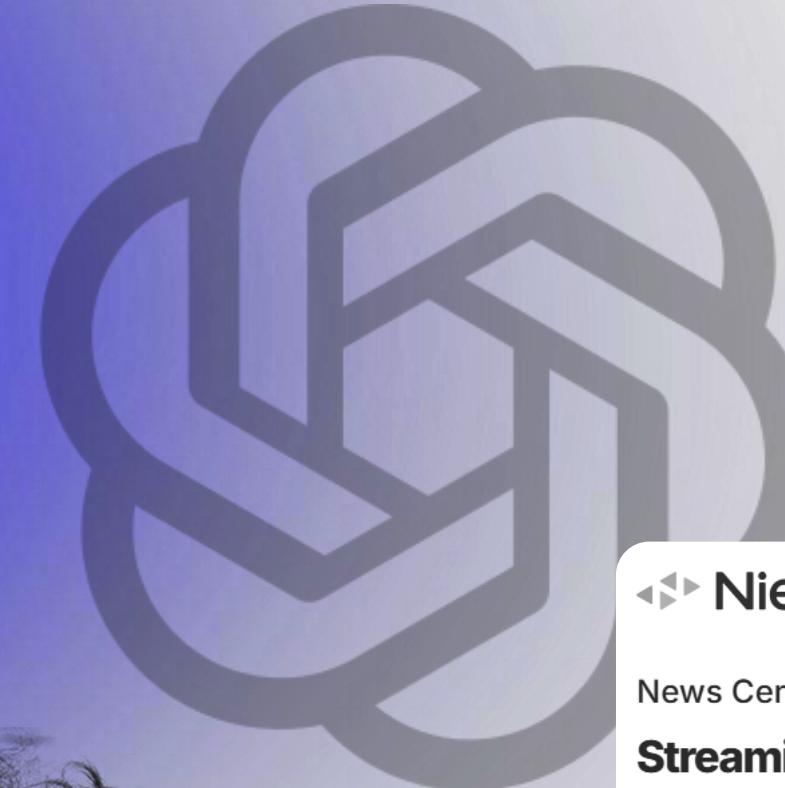




The industry's most comprehensive and **automated** digital media platform.



# A lot's been going on



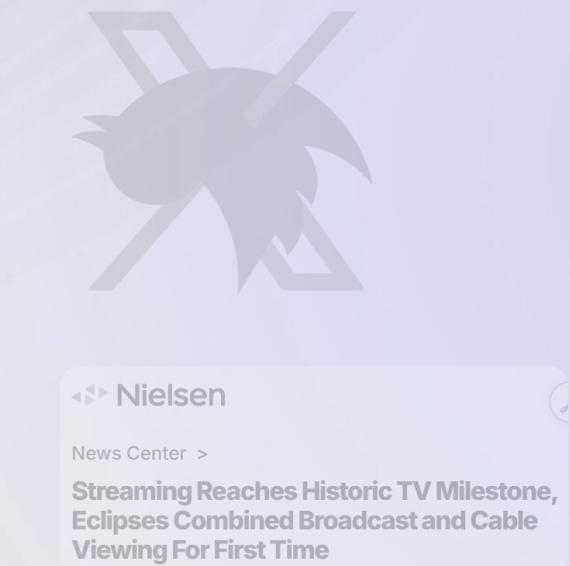
Nielsen

News Center >

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



# Future fixation has created a move-on mentality



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

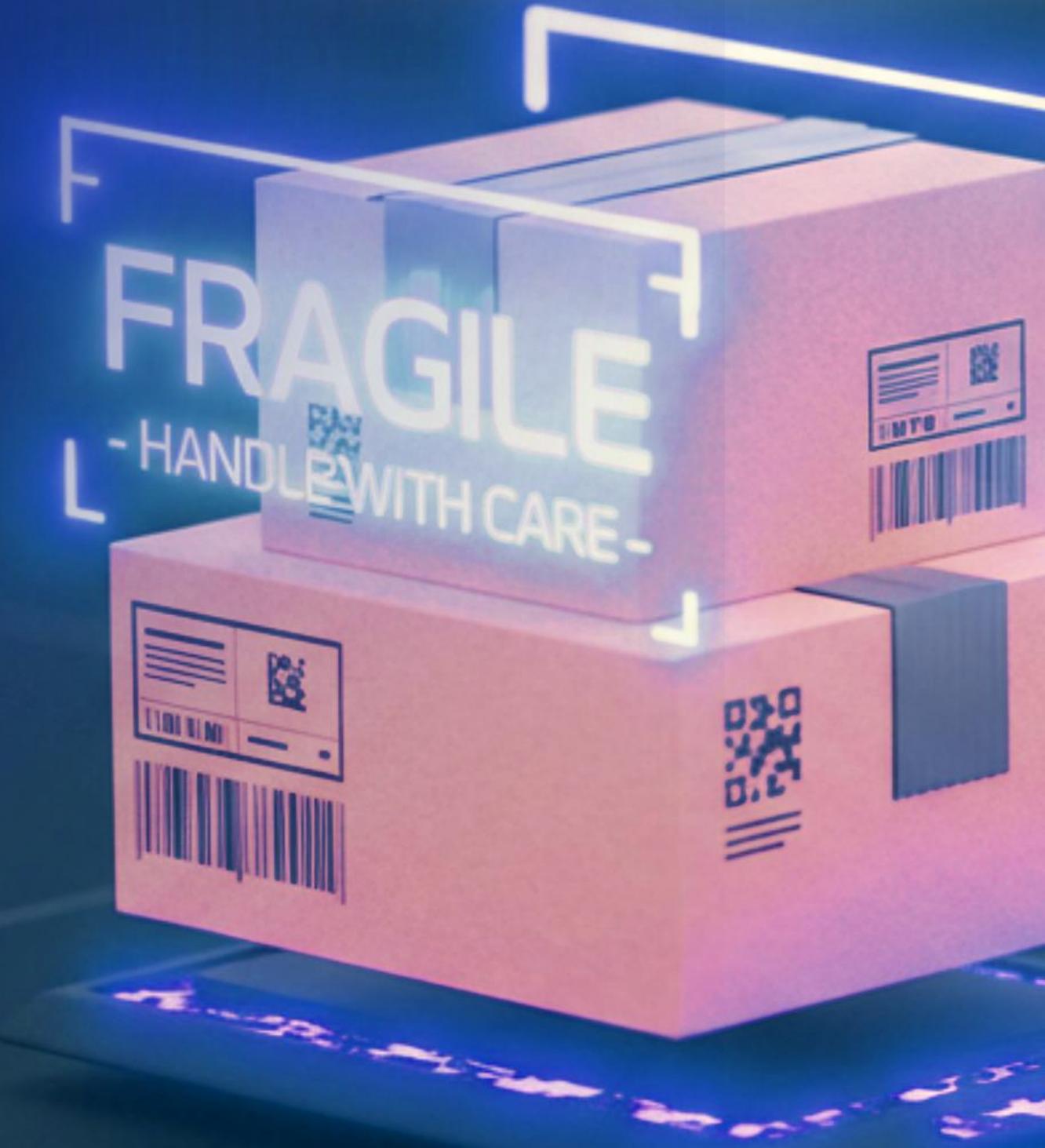
Streaming  
TV's Inequity

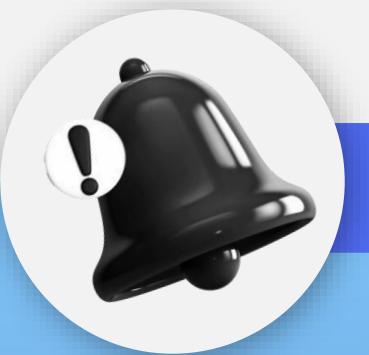
Agents of  
Chaos

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



# 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

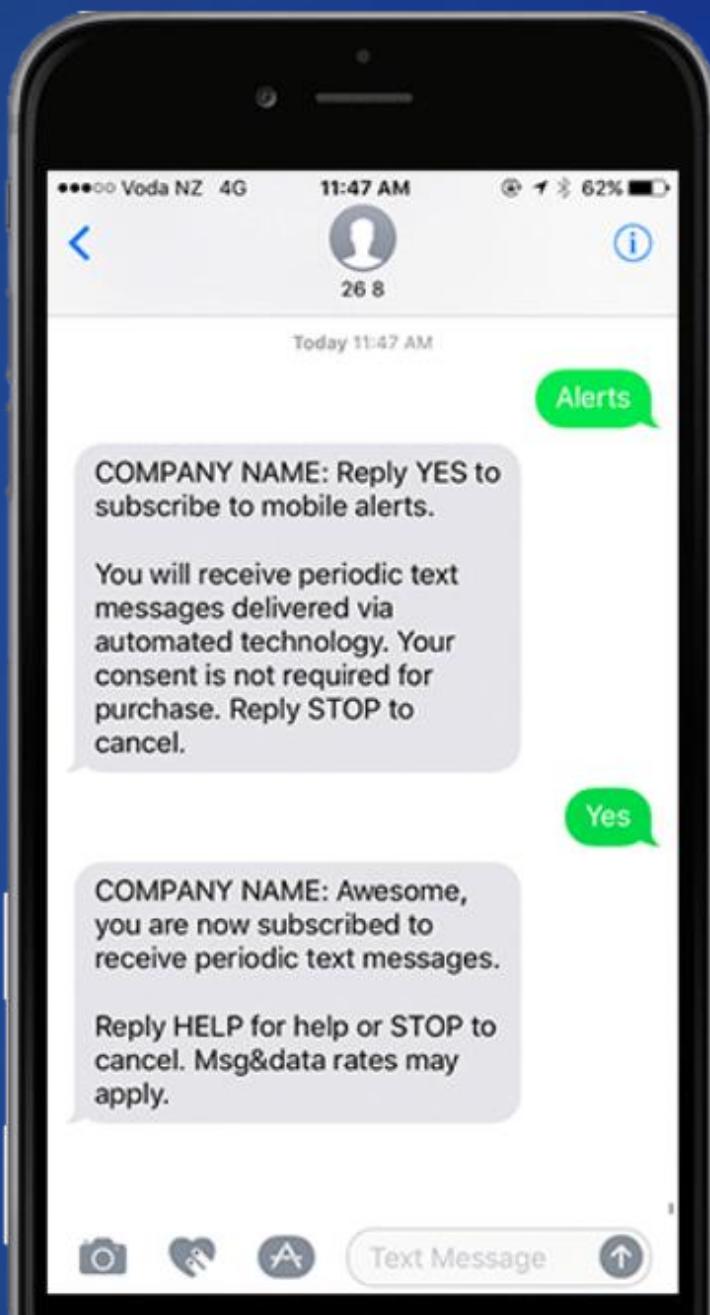
**\$26.8 Billion**

In global media value is lost  
due to inefficiencies

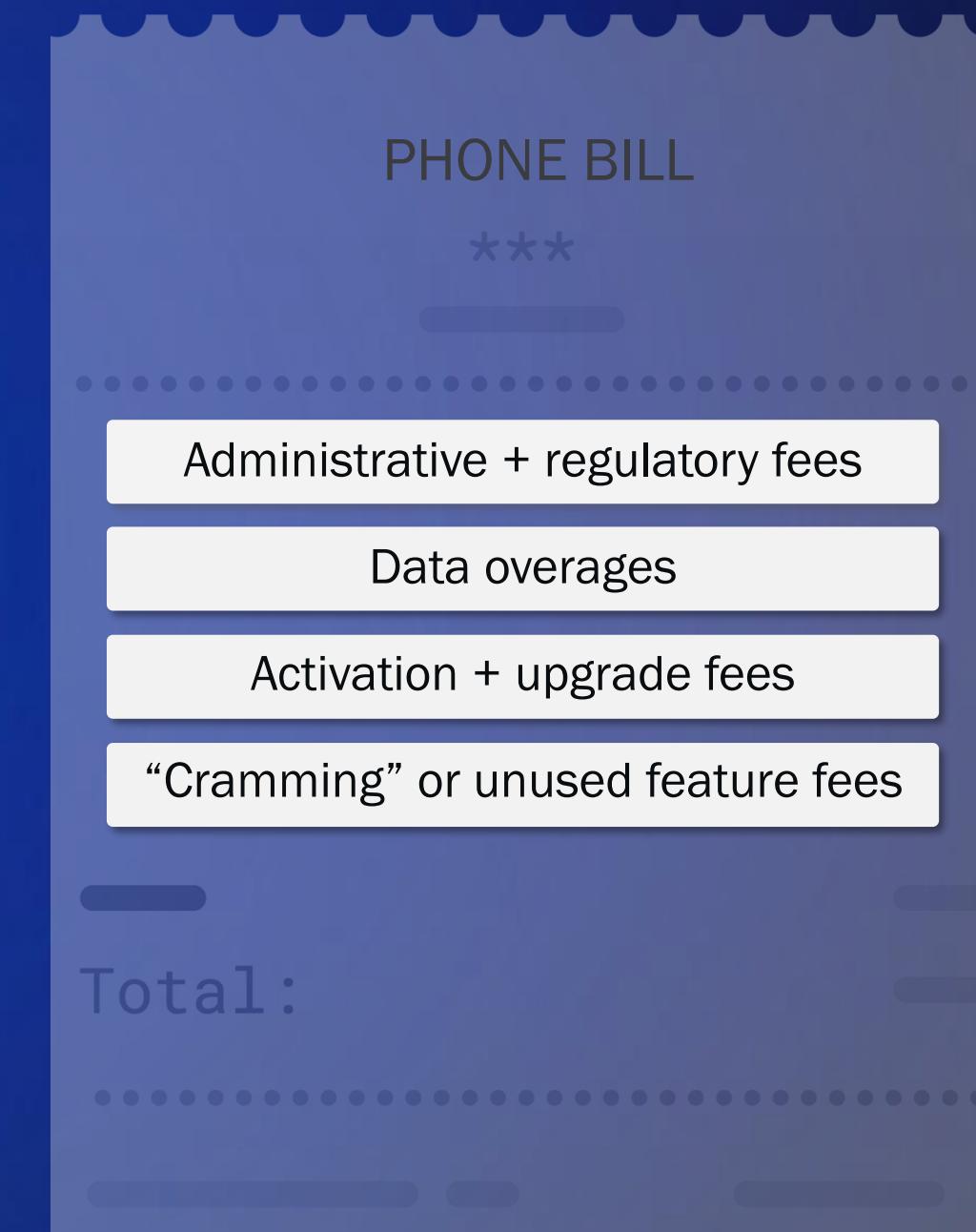
ANA

# 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**

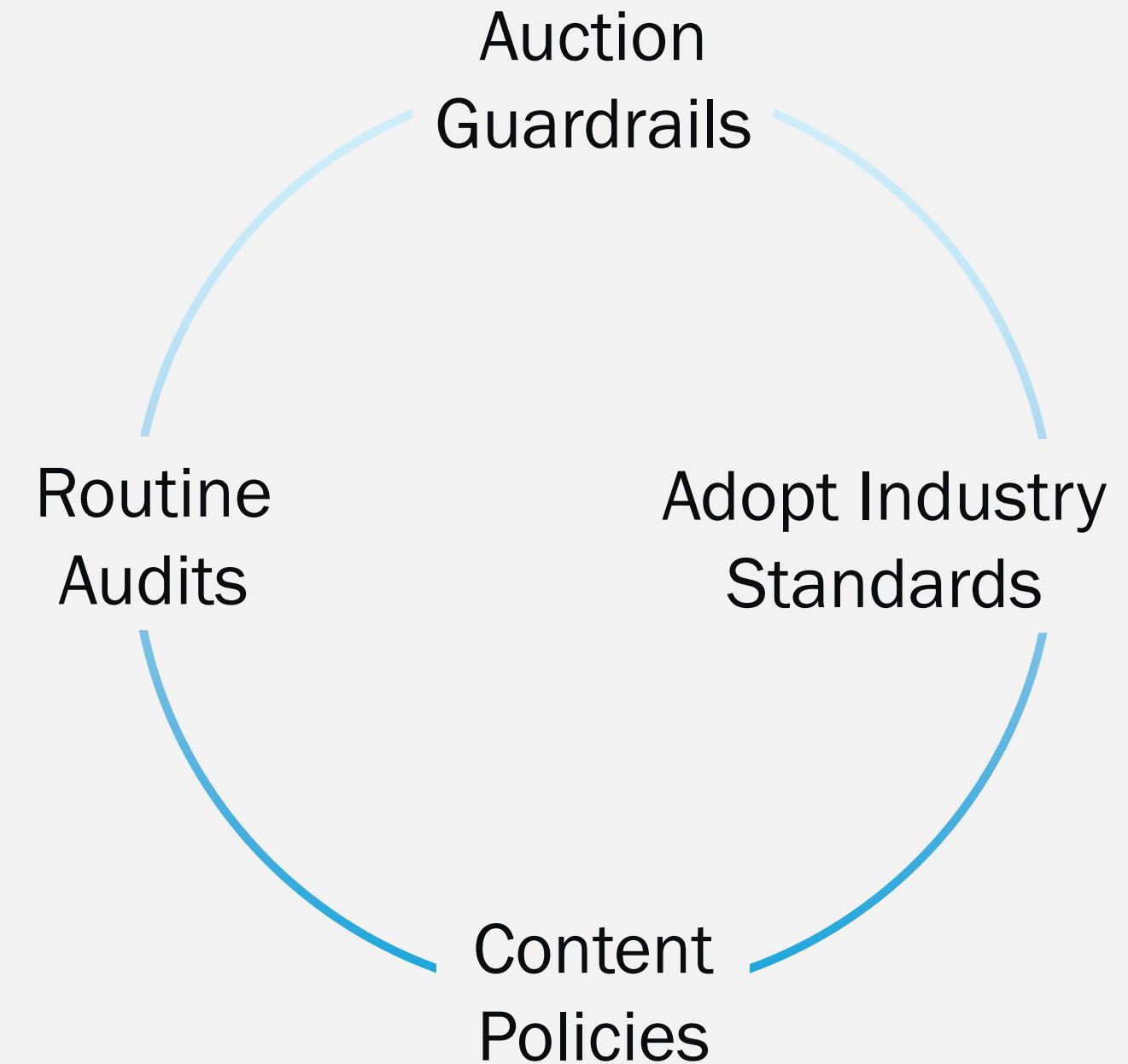
Data  
optimization

# 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

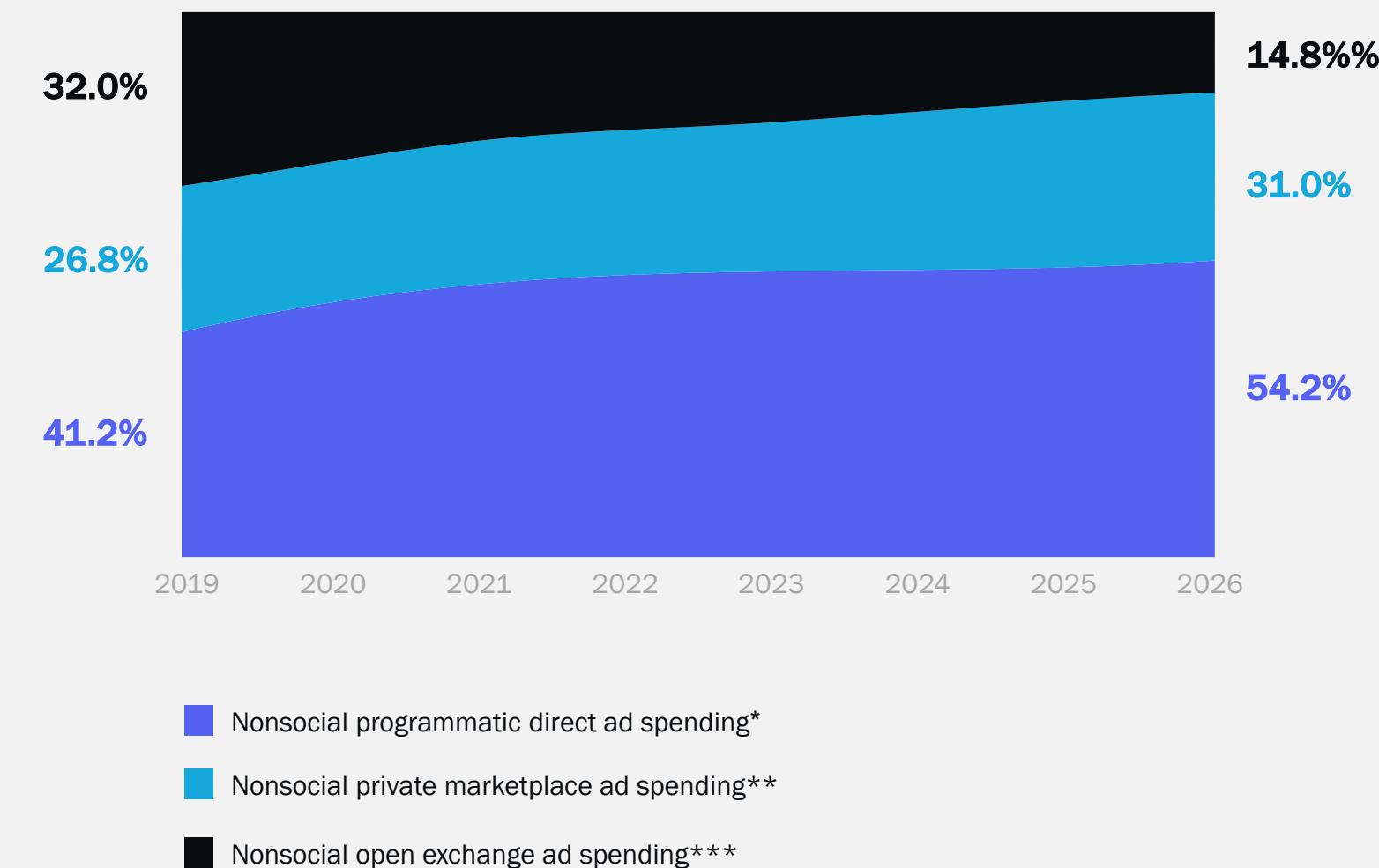


## 2 Customized Buys

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

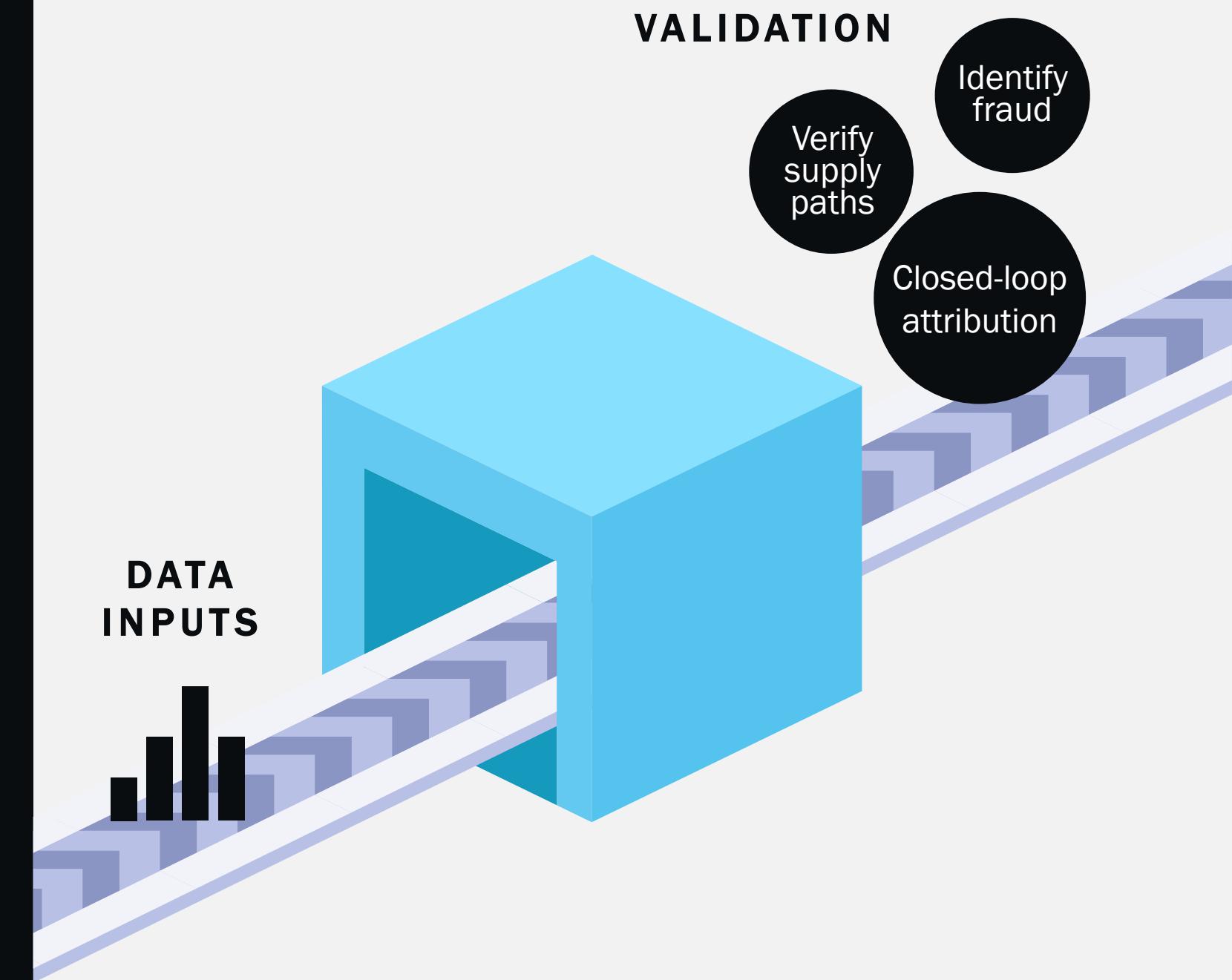


# Checkpoints to creating a cleaner supply path



## 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

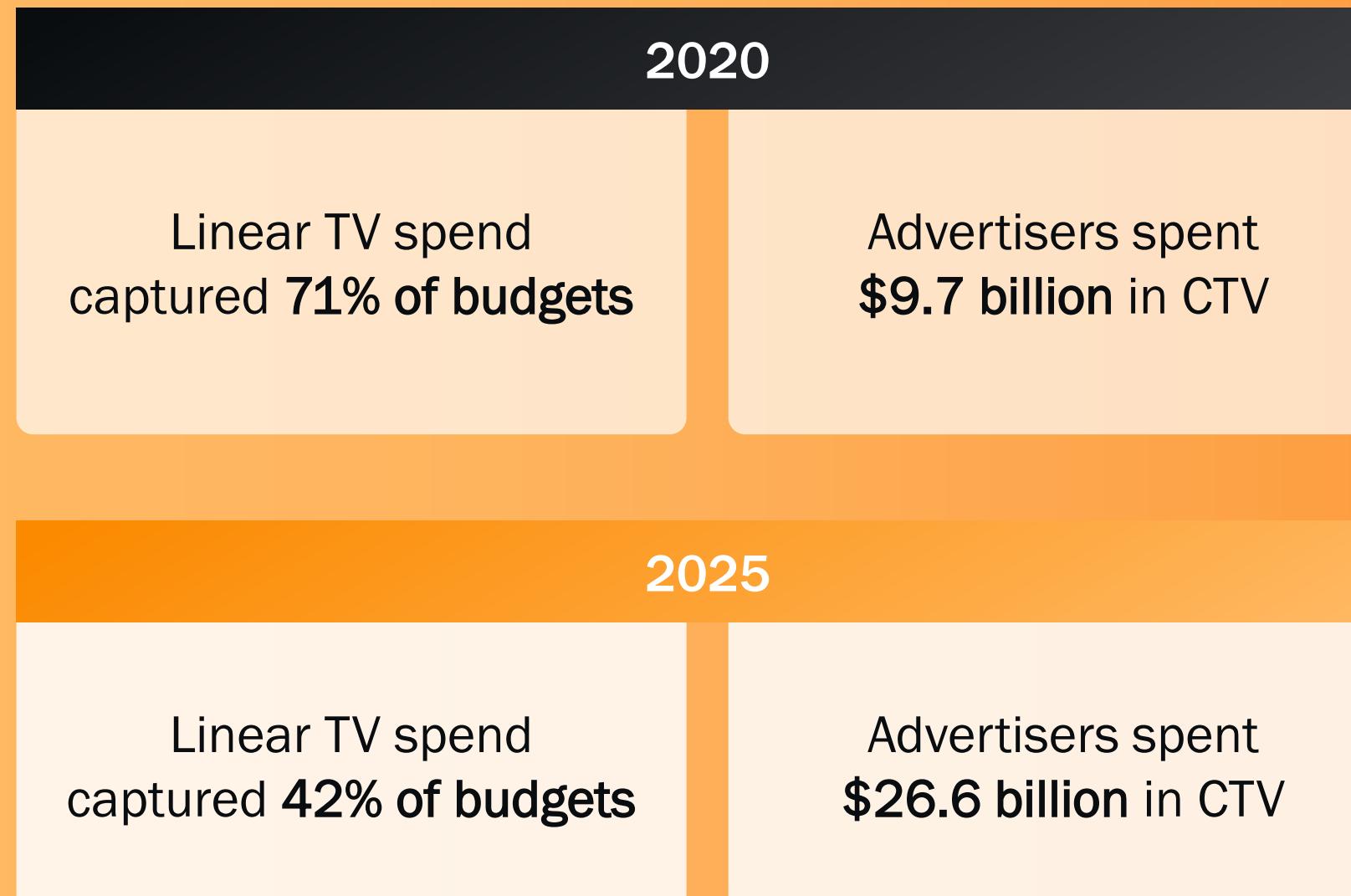
## PREDICTION:

The streaming TV quality  
gap will widen in 2026

# All inventory is not created equal



# Our expectations – and ad spend – are higher than ever

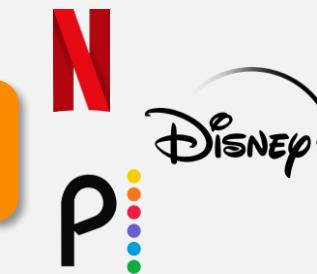


**42%**

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

# Marketers must pick up the controller

Platform



Inventory



Ad Formats



Data

Creative



Measurement

Nielsen iSpot.tv

comscore



# 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?

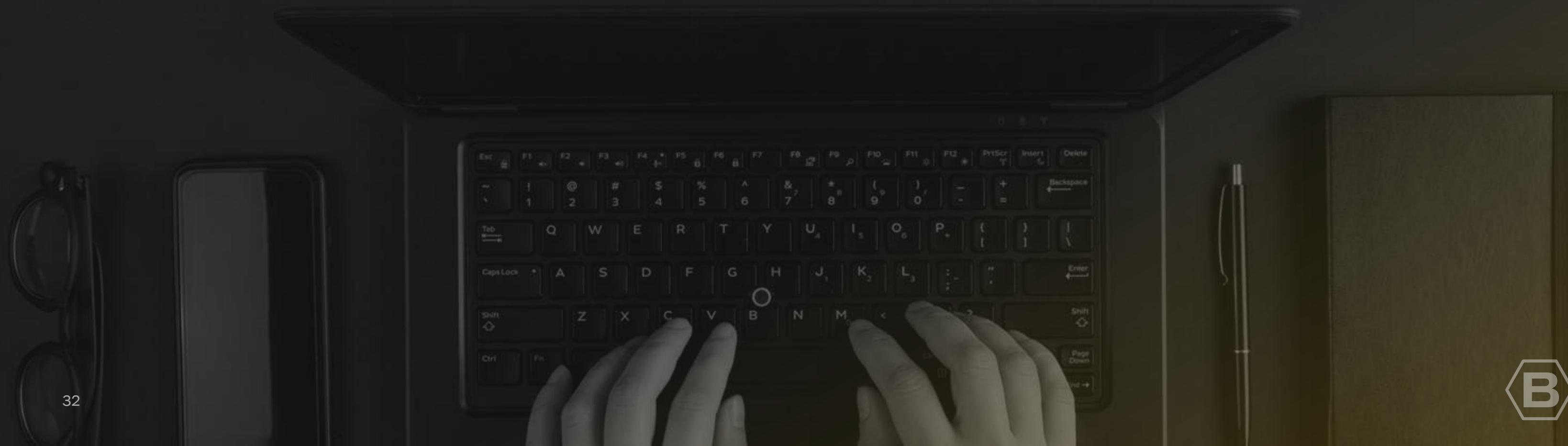
Choose from the following:

- 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



**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



## The Human Web

PAID MEDIA OPPORTUNITIES

Branding

Relationships

Experiences



## The Agentic Web

OPERATIONAL OPPORTUNITIES

Inference

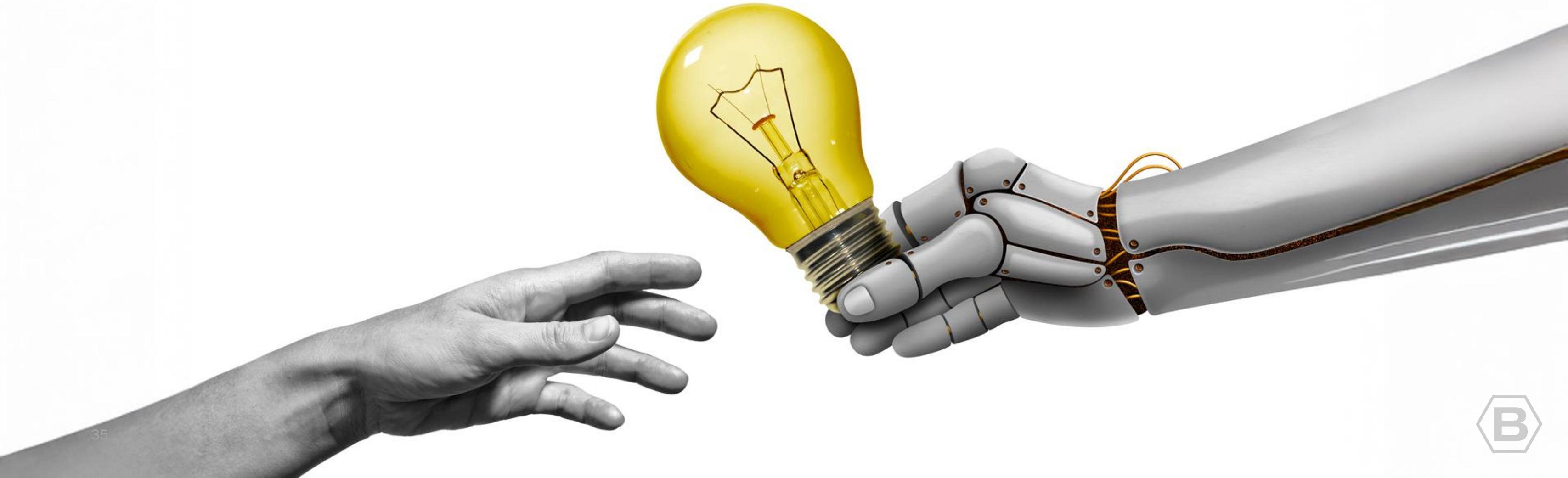
Automation

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*



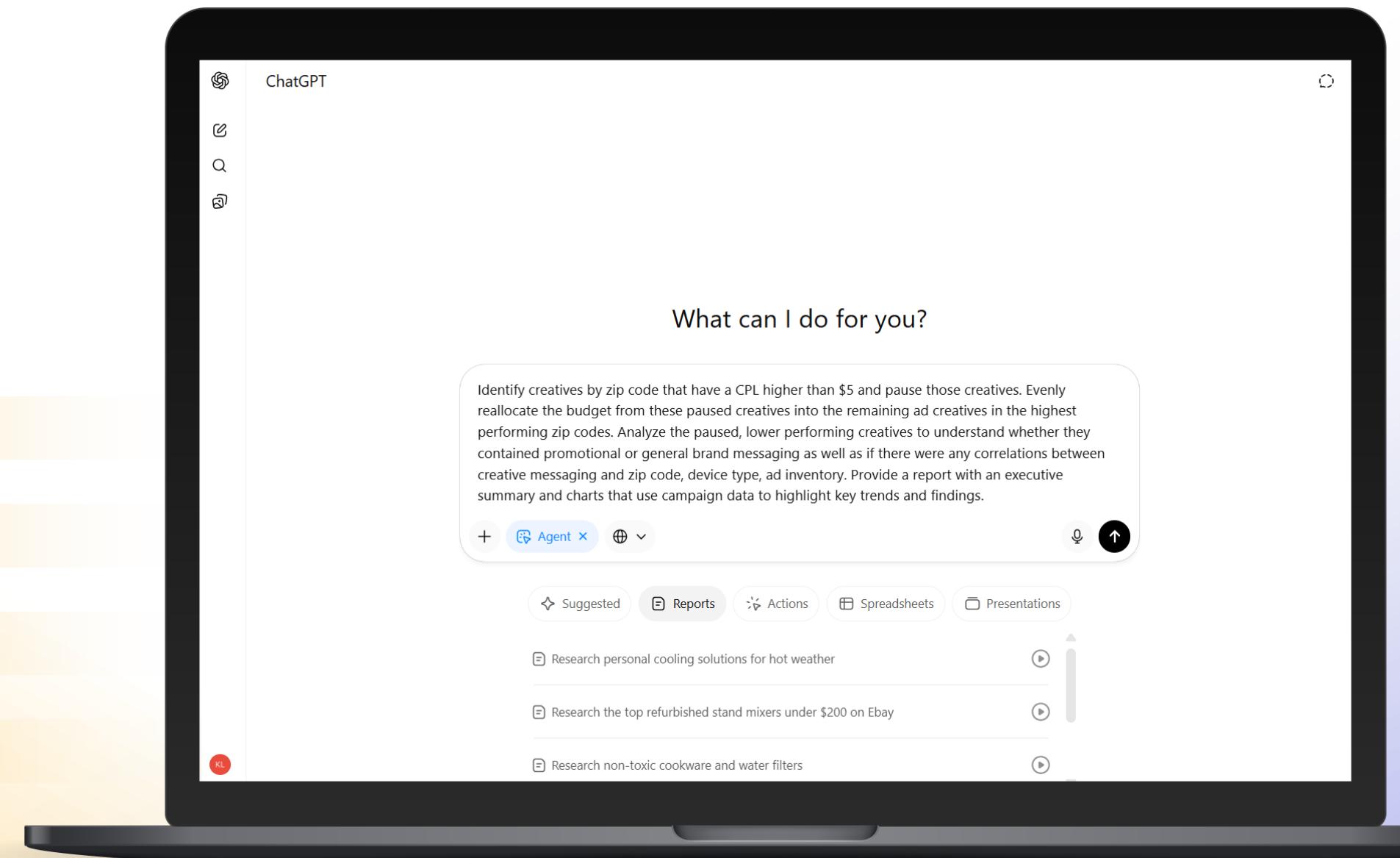
# Agentic AI's most valuable roles are invisible

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.



perplexity

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”



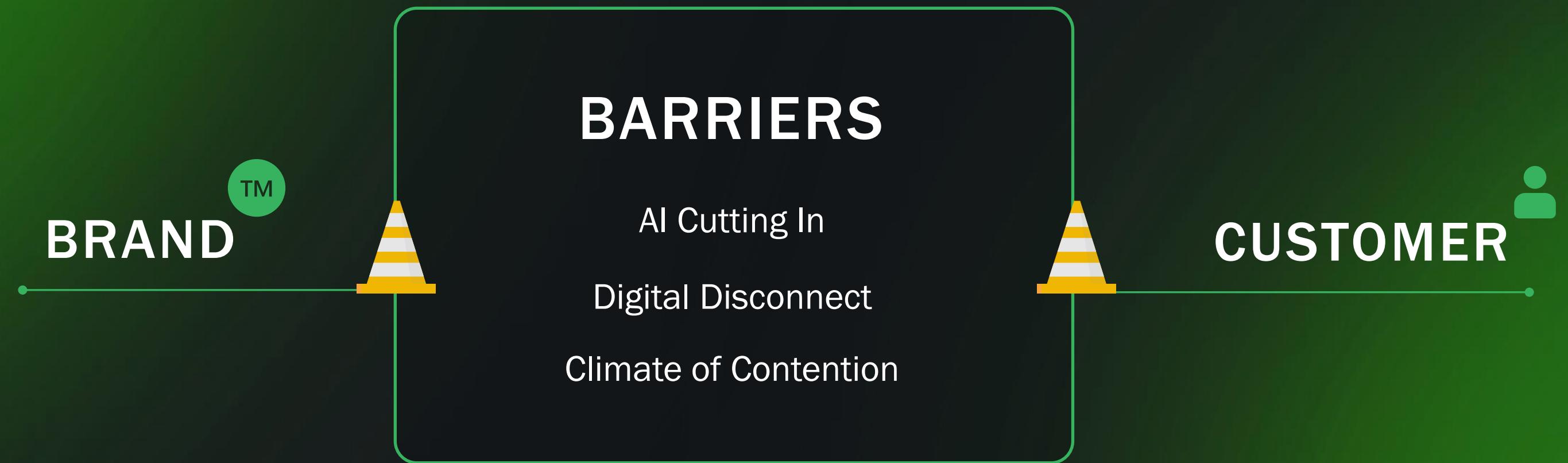
DISTRUST IS THE DEFAULT

71%

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

RELATIONSHIPS PRECEDE COMMUNITY

# Relationships insulate brands from distrust + disruption



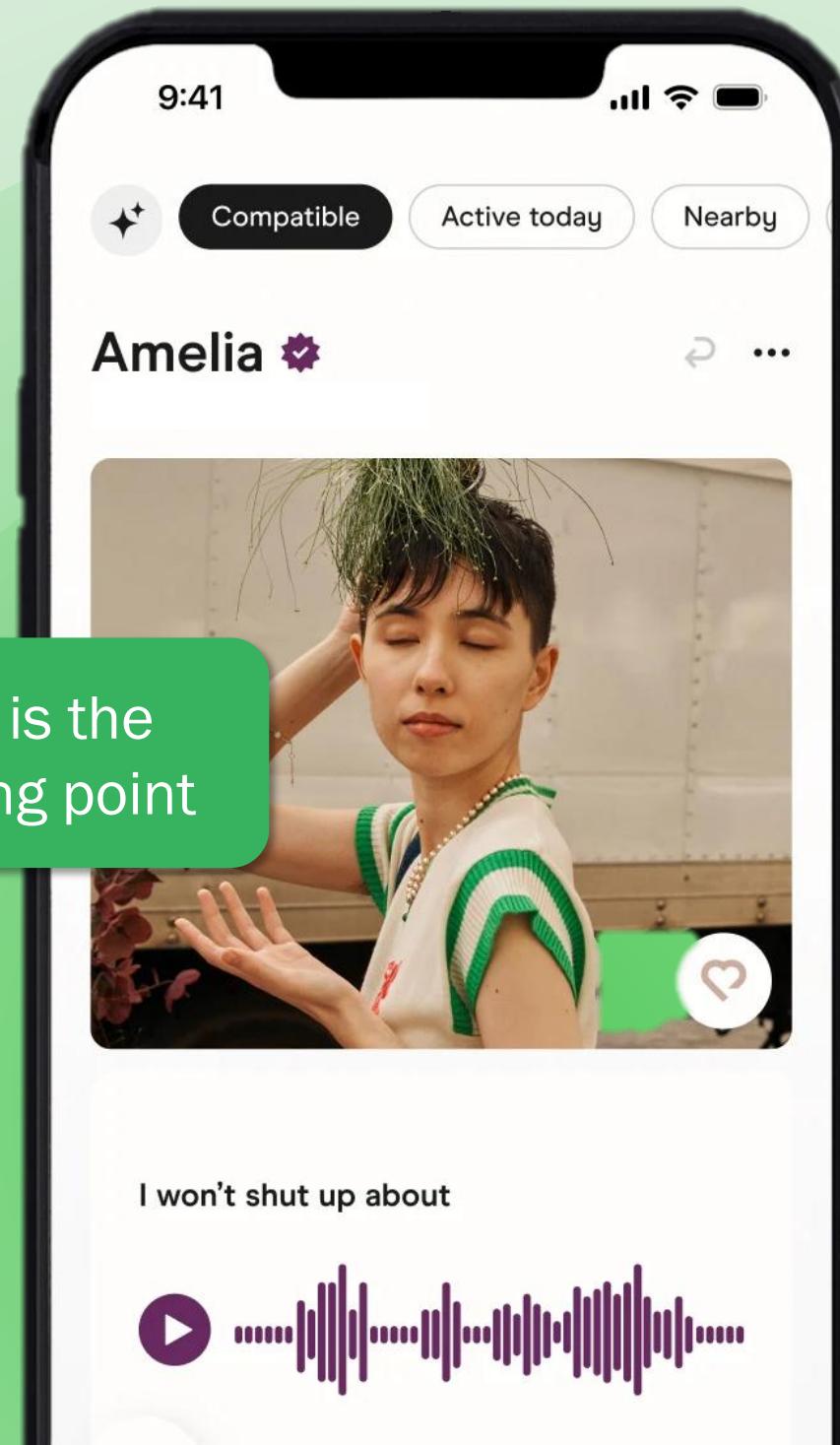
RELATIONSHIPS PRECEDE COMMUNITY

# Relationships insulate brands from disruption



RELATIONSHIPS PRECEDE COMMUNITY

# Relationship building is hard work



Initiative

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

Intention



Investment



RELATIONSHIPS PRECEDE COMMUNITY

# Relationship building is hard work



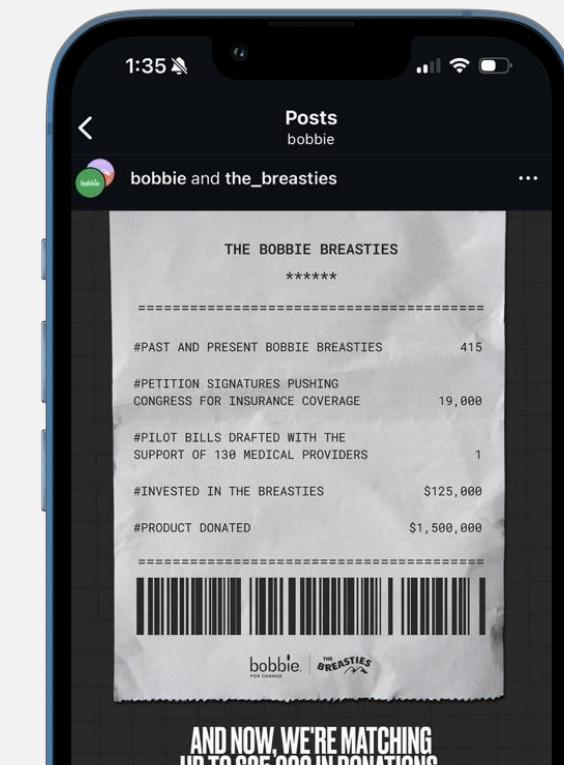
Initiative



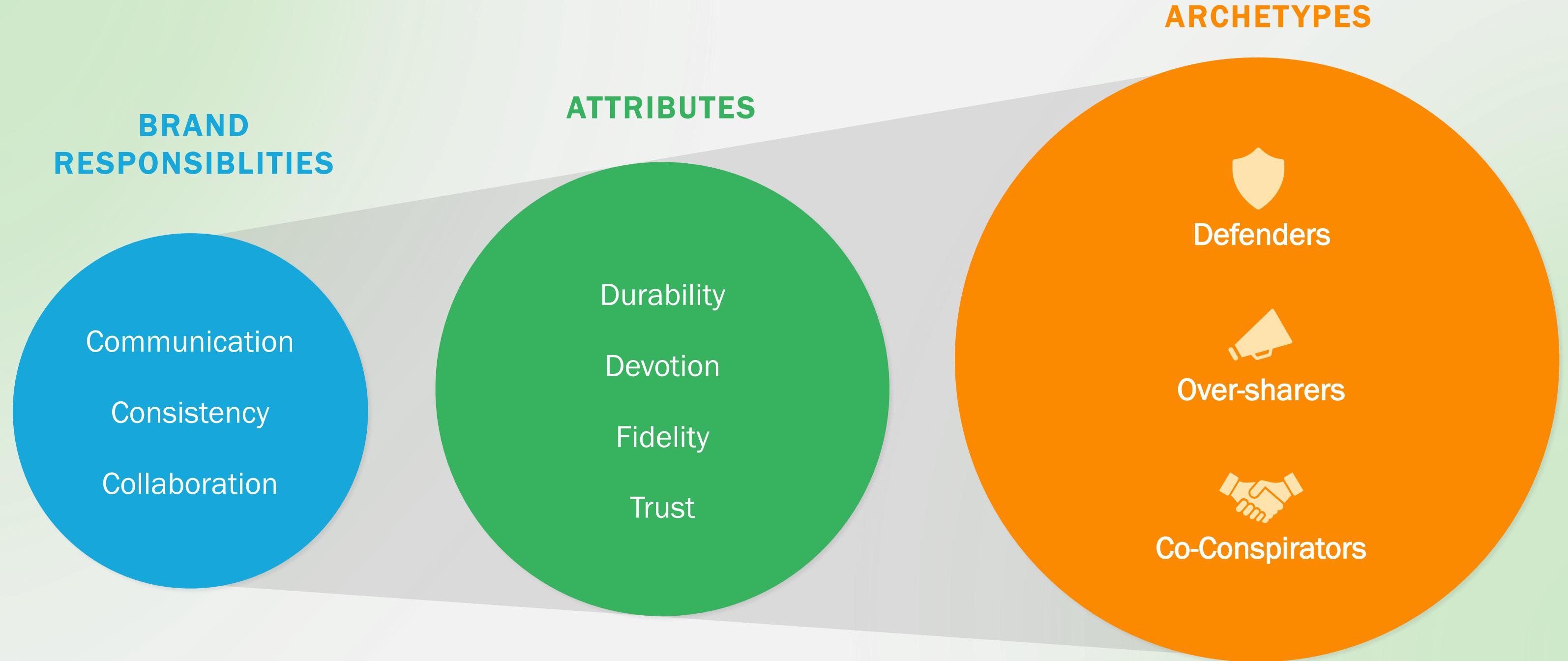
Intention

*"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

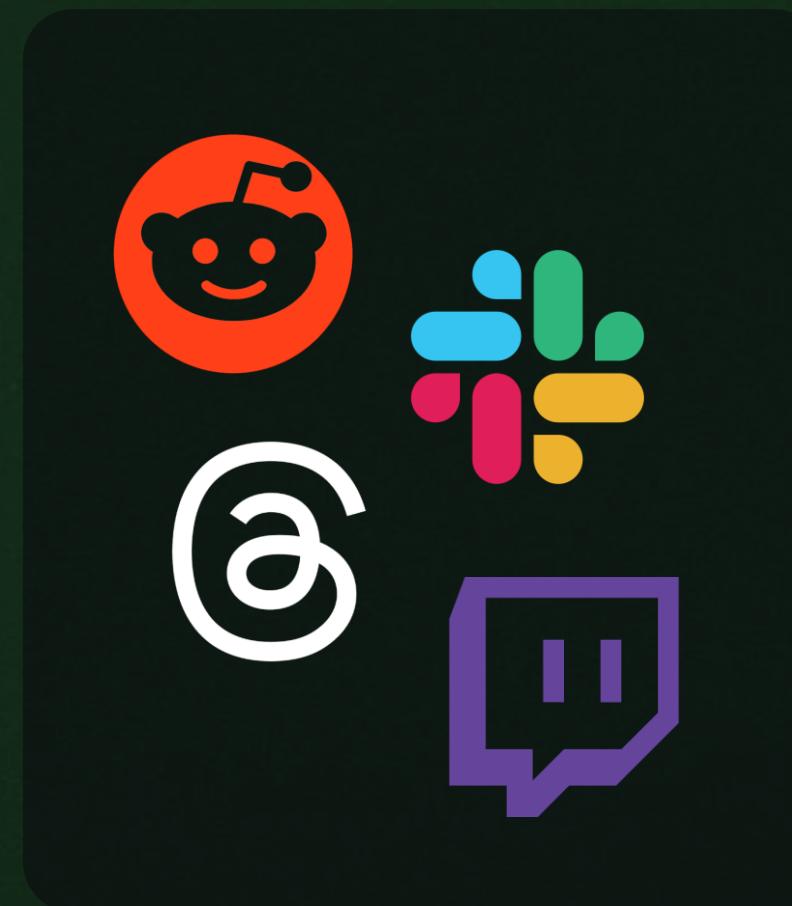


WHERE COMMUNITY HAPPENS TODAY

# Where brands gain and grow communities

## ENTER THE CHAT

Engage in conversations



## GET REAL

Establish tangible presence



## GAIN RELEVANCE

Lean into contextual AI



# 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](http://www.basis.com/2026TrendsReport)

