

Basis[®]

REWINDING TO FAST FORWARD

The 2026 Digital Advertising Trends Report

Introduction

OK, let's all just be honest with ourselves for a minute:

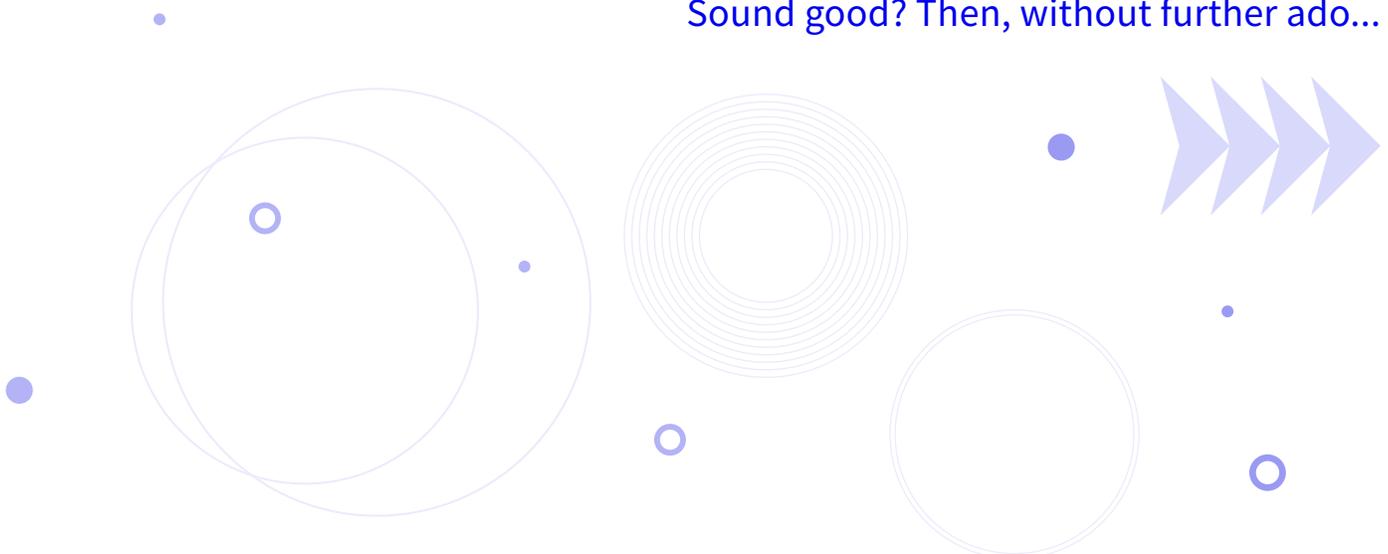
Most trends reports are nothing more than wish lists and buzzwords, filled with the latest overhyped products and aspirational technologies while self-servingly touting the publisher's own capabilities as The Next Big Thing That You So Desperately Need™.

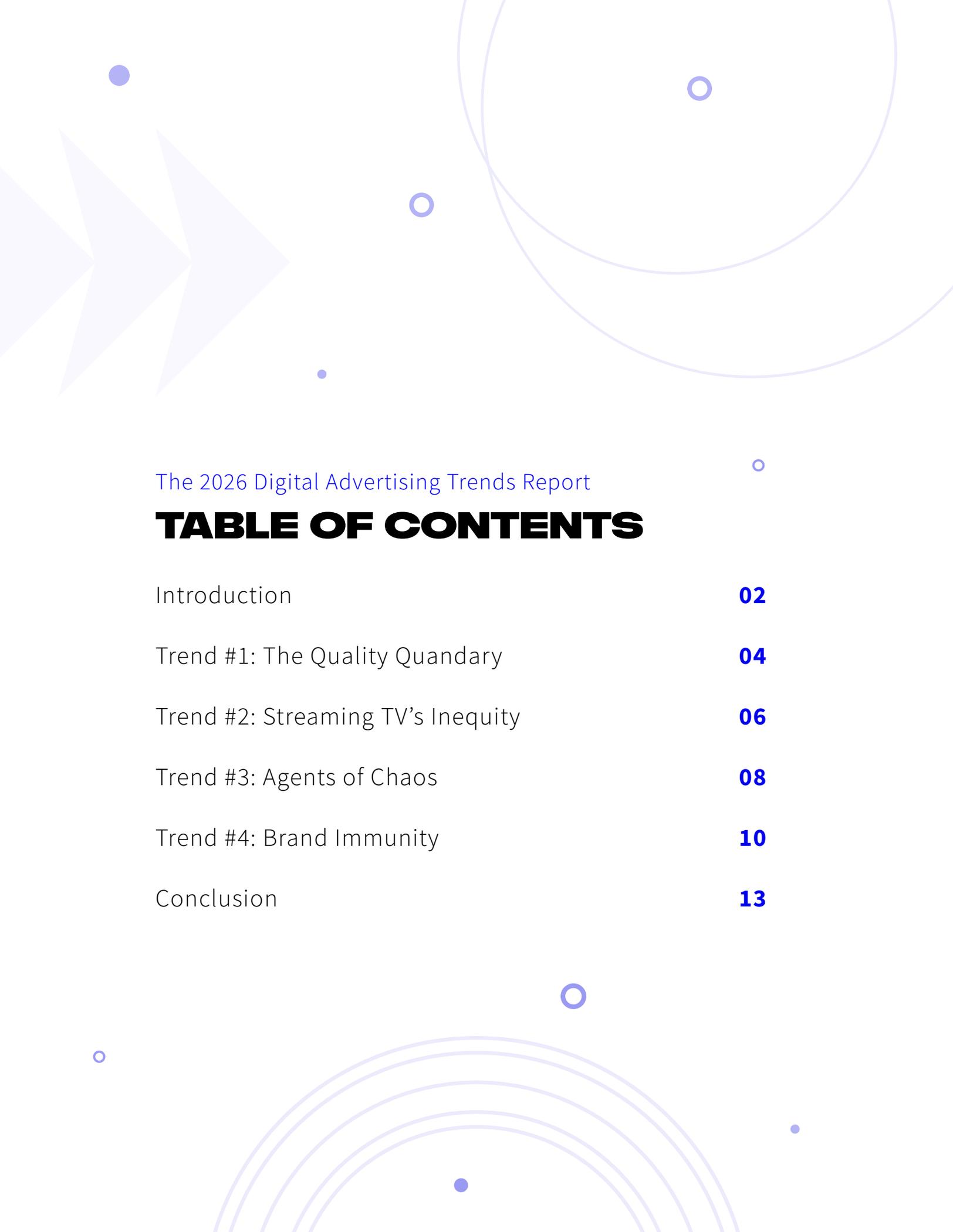
And sure, admittedly, those can be kind of fun to read! After all, it's cool to think about how a new innovation or a secret insight or tactic that was closely held until just this very moment (and that has only now been shared *exclusively with you*) will unlock unparalleled fortune and success in the year ahead. But in reality, you end up with a lot of empty promises, money pits, and hot takes that fade into foggy memories right around the time the New Year rolls around. For every innovation that claims to be the "next smartphone!" there are dozens of NFTs, metaverses, and blockchains left scattered in the wake, and marketers are stuck holding on for dear life as the industry confronts unprecedented fragmentation, complexity, and C-suite expectations.

Lucky for you, this is a very different kinds of trends report.

Inside, you will find real perspective on four key topics that are poised to shape the year ahead. Each highlights an area where actual innovation is well-positioned to address and overcome long-standing challenges and help marketers see meaningful, measurable growth in 2026. No gimmickry. No secret (or not-so-secret) salesmanship. Just real insights.

Sound good? Then, without further ado...





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TREND 1 The Quality Quandary

Ignorance may seem like bliss, but it comes with a heavy price.

Programmatic advertising remains the industry’s connective tissue, yet despite an array of high-profile scandals and widespread frustration, waste and misalignment seem to persist. Entering 2026, the debate around media quality has reached a stalemate: Everyone agrees it matters, yet too few are willing to own it.

Sure, people will complain about the so-called “adtech tax” and random, spontaneous fees that litter across the media supply chain. But all too often, that inefficiency is merely shrugged off, with advertisers left asking: *If my campaign hits its KPIs, is this really my problem?*

But after years of quiet apathy, the problem may now be too expensive to ignore. Studies show that only 36¢ of each programmatic dollar actually reach publishers, with the rest disappearing into opaque fees, untraceable intermediaries and hard-to-trace transactions¹. And at a moment when advertising dollars are under heightened scrutiny, writing off nearly 2/3 of every dollar spent as “the cost of doing business” while receiving no tangible benefits in return is unlikely to land gently with C-suite skeptics.

In truth, the steady decline of media quality has become a, corrosive force eating away at the health of the ad industry. As long as short-term outcomes take precedence over long-term accountability, poor-quality inventory will continue to masquerade as efficiency. The persistence of made-for-advertising (MFA) sites—their impact diminishing over the past year, but still taxing marketers millions in wasted impressions—underscores the cost of that indifference.

Supply path optimization (SPO), transaction IDs, programmatic guaranteed and curated private marketplaces were designed to fix this. They reduce steps, increase transparency, consolidate spend and—at least theoretically—direct more dollars to legitimate publishers. Yet many advertisers still view SPO as a procurement exercise rather than a strategic safeguard. And so, as the ever-complex programmatic pipeline expands, so too have opportunities for value leakage.

Reports still identify 3% of ad spending as “unknown delta,” aka money that has seemingly disappeared into the ether². While that’s a marked improvement over the 15% of unattributable spend researchers cited back in 2020, 3% of global ad spending is still \$25+ billion—roughly the GDP of Jamaica³.

¹ <https://www.ana.net/content/show/id/programmatic-transparency>

² <https://www.isba.org.uk/system/files/media/documents/2023-01/ISBA%20%20PwC%20programmatic%20supply%20chain%20study%20II%20%28summary%29-%2018%20January%202023.pdf>

³ <https://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEO/WORLD>

Trend #1 | The Quality Quandary

Publishers, meanwhile, are being squeezed from all sides, facing AI overviews, deprecating cookies, declining open-web CPMs, and growing platform dependency. While digital advertising business continues to grow apace, every adtech tax deducted from working media weakens the very supply base advertisers rely on, and quality inventory is being crowded out by quantity.

In truth, media quality is essential to media outcomes. Without verified, contextually aligned, and human-served impressions, performance data itself becomes suspect. In 2026, advertisers can no longer separate their results from the integrity of the systems producing them.

 *just*
36¢ of every
programmatic
dollar reaches
publishers⁴.

 **88%** of all programmatic
spend in Q2 2025 was
directed to private
marketplaces (PMPs)⁵.

Taking Action in 2026

Reclaiming media quality begins with reframing accountability. Advertisers can no longer treat transparency as someone else's job or a cost-center audit they trudge their way through once a year. It's a strategic function that directly shapes ROI, brand safety, and publisher sustainability—all of which are essential to the future health of the industry.

Leaders must approach their supply chains with the same rigor they apply to creative or targeting. They'll need to approach curation as more than a buzzword, but an actual filter for integrity, providing tighter, verifiable paths that align dollars with trusted inventory. They'll have to work directly with publishers wherever possible to demand proof of value and return a fairer share of spend to content that drives legitimate engagement. And they'll want to embrace a "quality-as-strategy" mindset, institutionalizing transparency to the point that things like agency audits can go from reactive obligations to competitive advantages.

Ultimately, the competitive edge will belong to those advertisers who view transparency as a value creator, and who give themselves permission to ask and expect more of their partners.

⁴ <https://www.ana.net/miccontent/show/id/rr-2023-12-ana-programmatic-media-supply-chain-transparency-study>

⁵ <https://www.ana.net/miccontent/show/id/rr-2025-08-programmatic-transparency-benchmark-q2>

TREND 2 Streaming TV's Inequity

**Premium platforms don't guarantee premium placements.
It's time for advertisers' approach to CTV to evolve.**

The streaming era was going to be the great equalizer. As ad-supported tiers took hold across Netflix, Disney+, and Prime Video, advertisers were promised access to the crown jewels of television: live sports, tentpole events, and prestige programming. These premium environments, at long last, would be open to all comers—from global brands to small and midsize businesses—driving both reach and profitability and expanding TV from a destination for the deep pocketed to a marketing populist paradise.

And, in many ways, that promise has materialized: Time spent watching CTV rose 6% year-over-year in 2025⁶, and ad-supported streaming now accounts for nearly 75% of total TV viewing time, with inventory supply continuing to expand in kind⁷.

Yet this welcome abundance has come, like all things, with unintended consequences. Suddenly, any and all inventory that comes from a well-known, established platform is being marketed as “premium,” and while major services tout high-quality environments, much of what advertisers actually buy sits within long-tail apps, user-generated channels, or bundled placements with limited transparency. Making matters worse, generative AI is now fueling bot traffic and false impressions that explicitly target streaming environments such as CTV, creating an atmosphere that is starting to feel eerily similar to the early days of the open web.

The widening “Premium vs. Streamium” divide is also reshaping planning decisions. Some advertisers are content with broad, run-of-content buys that deliver linear TV-like scale while others—particularly performance-driven brands—are pursuing precision—investing in curated supply paths and content-level targeting to match specific audiences. Fragmentation, of course, complicates both routes, as each major platform uses its own measurement currency, limiting cross-platform visibility and unified attribution.

As CTV matures, advertisers' perception of premium content will need to mature as well, evolving from a tempting label to a set of verifiable attributes: audience, transparency, viewability, measurability, context, and trust.

⁶ <https://www.comscore.com/Insights/Events-and-Webinars/Webinar/2025/Comscores-2025-State-of-Streaming>

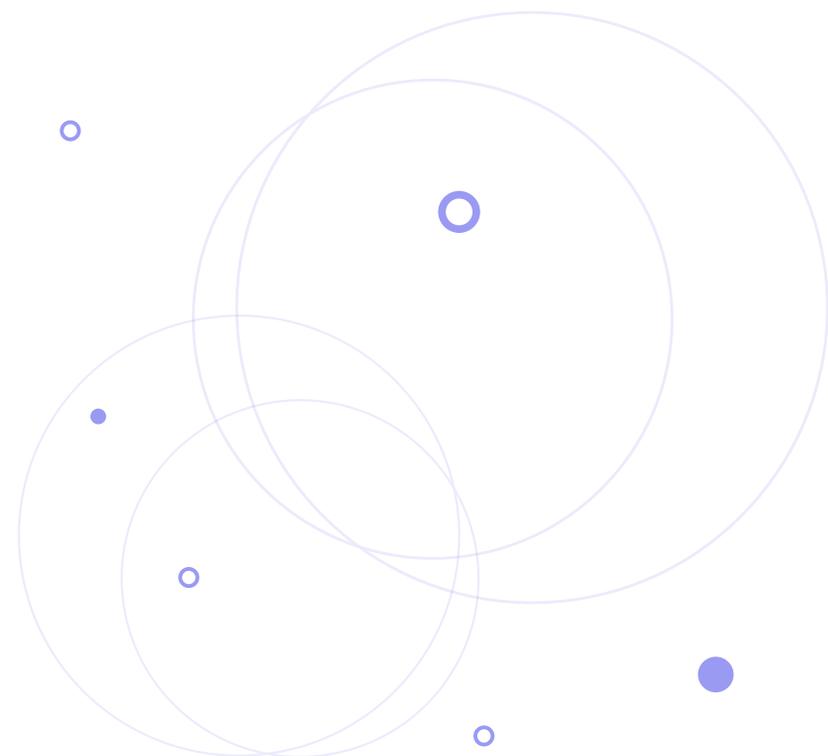
⁷ <https://www.nielsen.com/news-center/2025/viewing-to-content-with-ads-gained-share-to-73-6-of-overall-tv-viewing-in-q2-nielsens-q2-2025-ad-supported-gauge-finds/>

Trend #2 | Streaming TV's Inequity

How to Succeed in 2026

The opportunities that come with premium streaming inventory are real—especially around tentpole events, live sports and other marquee programming—but CTV quality control is no longer a given. Leaders must shift their view of the channel and more strongly align their content objectives with inventory-specific strategies. Broad awareness initiatives may justify run-of-content buys, but performance-driven efforts demand curated placements and app-level transparency. Additionally, each objective requires its own measurement model, often calibrated to the specific capabilities of a given platform.

In 2026, CTV planning must be viewed as a microcosm of the larger media ecosystem, wherein fragmentation demands specialization. Aligning creative with context-aware ad formats and embracing unified measurement across multiple platforms (and multiple channels) can turn streaming from a chaotic top-of-funnel opportunity into a structured growth driver. By treating CTV as an ecosystem—rather than a single channel—advertisers can extract its full value.



» **73.6%**
of total TV viewing is
now ad-supported⁸.

» **6%**
increase in time spent
wanting CTV YoY⁹.

⁸ <https://www.nielsen.com/news-center/2025/viewing-to-content-with-ads-gained-share-to-73-6-of-overall-tv-viewing-in-q2-nielsens-q2-2025-ad-supported-gauge-finds/>
⁹ <https://www.comscore.com/Insights/Events-and-Webinars/Webinar/2025/Comscores-2025-State-of-Streaming>

TREND 3 Agents of Chaos

As agentic AI evolves from hype to infrastructure, brands must learn to communicate with both humans and machines.

Agentic AI—systems capable of acting autonomously and executing multi-step tasks to achieve defined goals—is widely expected to be the next major leap in artificial intelligence. Should they meet expectations, the tools have the potential to fundamentally reshape marketing and advertising operations, taking AI from “assistive tools” to “autonomous collaborators.”

Despite its promise, adoption of agentic AI remains limited, with just 20% of industry professionals saying their organizations currently “employ” AI agents for marketing and/or advertising work¹⁰. But that number is expected to rise in year ahead as organizations look to AI for competitive advantages such as speed, adaptability, and cost-savings. By the end of 2026, agentic AI is poised to cross the credibility threshold, becoming a tangible operational layer that may well reshape how advertising is planned, optimized, verified, and measured.

Simultaneously, a broader architectural shift is under way. The internet is slowly dividing in two: A human web—where people interact visually, emotionally, and socially—and an agentic web, where autonomous systems communicate on their behalf. Eventually, if AI futurists’ dreams come true, these layers will merge, but for now, they require different (but interrelated) strategies. The human web is where brands will continue to build relationships through storytelling and creative resonance. The agentic web, by contrast, is where machines will transact, evaluate, and recommend, quietly influencing what humans see next. The challenge, then, is to maintain a strong presence across both.

As consumers increasingly rely on AI assistants to navigate decisions, a brand’s discoverability will depend on whether those systems can recognize, understand, and trust its data without overcorrecting and leaving behind human users in the process. A website optimized for human eyes but invisible to an AI agent may lose relevance entirely, while a website optimized solely for machines could alienate human decision-makers. The key here, as always, is balancing those two priorities appropriately.

¹⁰ <https://basis.com/reports/ai-and-the-future-of-marketing-2025>

Preparing for Success in 2026

In 2026, marketing and advertising leaders will need to take a deliberate, organization-specific and performance-oriented approach to AI. They should start by identifying functions where automation and autonomy compound value—among them: campaign pacing, creative iteration, inventory validation, and multi-source analytics. Deploying AI-powered tools here can reduce error, accelerate response, and scale institutional knowledge.

Besides operations, brands can also benefit from preparing their digital ecosystems for machine readability, creating structured data, clean APIs, and metadata-rich content that allows agents to ingest and interpret brand information.

Lastly, as with any major tech transformation, change management will be essential to successfully deploying AI agents across a marketing organization. Earning employee buy-in and treating agentic as an accelerant for human intelligence—not as a replacement for it—will help marketers get more out of their AI investments in 2026.



▶▶ **20%**
of organizations currently
“employ” AI agents for marketing
and/or advertising work¹¹.

▶▶ **73.9%**
of marketers say their organizations
have plans to invest in new technology
to automate or streamline processes
within the next 12 months¹².

¹¹ <https://basis.com/reports/ai-and-the-future-of-marketing-2025>

¹² <https://basis.com/reports/ai-and-the-future-of-marketing-2025>

TREND 4 Brand Immunity

In an age of cultural volatility, social fragmentation, and algorithmic authority, brand loyalty must be earned—and never assumed.

The social and technological climate of 2026 has rewritten the rules of branding.

For years, quality and value have reigned as the two most-essential facets of purchase consideration. But this year, consumers ranked a third factor as equally influential: trust.

Yes, brand trust is now foundational to brand loyalty. Once won, it can function as a powerful foundation to customer relationships, with preferred brands earning higher levels of trust than any other institution, including business, media, government, NGOs, and employers¹³.

When building trust, authenticity is a brand's most valuable asset, fostering loyalty, forgiveness, and advocacy in moments of scrutiny. At the same time, trust can never be assumed. Cultural narratives on social media seem to emerge and evolve in the time it takes to refresh your For You Page, leaving brands vulnerable to cycles of outrage or irrelevance.

In a world marked by pervasive distrust, a brand's true moat is developing a community of people who advocate with it, not merely for it. This shift—reminiscent of the early, pre-algorithmic days of social media—reframes marketing engagement from persuasion-based to participation-based, wherein brand representatives hold ongoing dialogues on their behalf across an array channels, platforms, and communities. It can look like a superfan raving about a new product on Reddit, an influencer unboxing your latest offering on TikTok, or (in a classic of the genre) a loyal user spreading the gospel of your brand to friends at an afterwork happy hour.

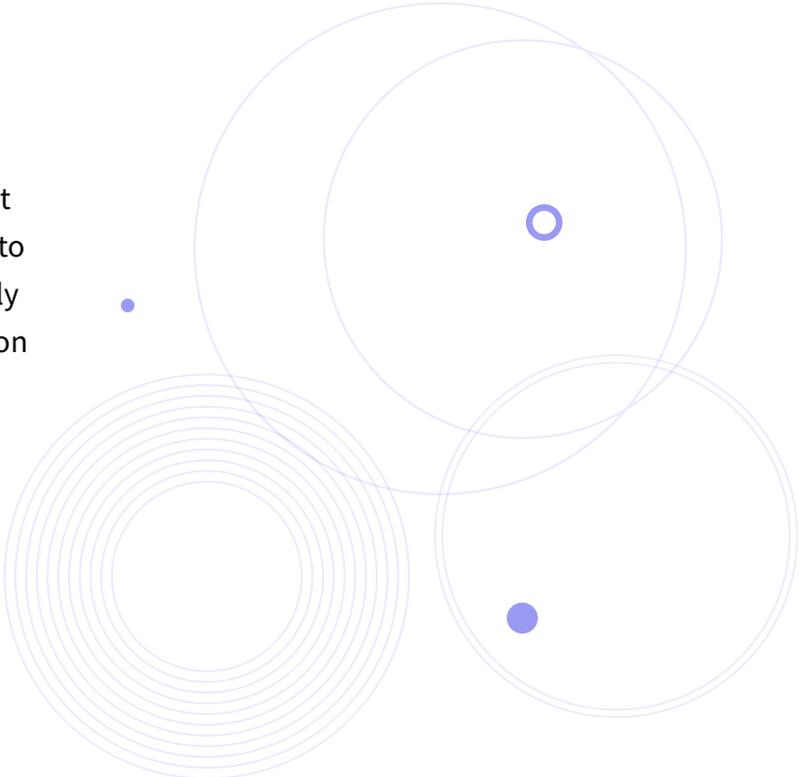
¹³ <https://www.edelman.com/trust/2025/trust-barometer/special-report-brands>

Trend #4 | Brand Immunity

As for implementing and measuring those efforts in advertising, neuro-contextual solutions like Seedtag, GumGum, and Disney’s “Magic Words” go beyond basic keyword analysis to interpret deeper signals like emotion, intent, and mood for ad targeting, allowing brands to forge stronger, more authentic and emotion-based relationships with consumers.

And it wouldn’t be 2026 trend if there wasn’t an AI tie-in, so it’s perhaps no surprise that this brand renaissance will also have significant importance in a zero-click, AI-powered future.

In the AI search era, brand awareness directly impacts both memorability and discoverability. A clear, consistent identity—rooted in trust and participation—will determine whether consumers ask an AI model for “A great TV for sports” or for “The best LG TV to help me feel like I’m actually at Soldier Field watching the Bears.” And the response to that prompt will ultimately reflect the culmination of creative, experiential, and community-oriented efforts to build trust, recall, and perceived reliability. In the year ahead, visibility will increasingly hinge on fostering emotional resonance in human spaces and technical interoperability in agentic ones. The future of brand building requires mastering both.



88%
of consumers say trust is important or a “deal breaker” when it comes to the brands they use or buy—equally important in purchase consideration as quality or value¹⁴.

¹⁴ <https://www.edelman.com/trust/2025/trust-barometer/special-report-brands>

SIDEBAR: Brand Building in the Age of AI

Imagine a consumer is looking for a new TV. With AI, that interaction is no longer a mere perusing of links and list. Each prompt—and each answer—shapes how and whether a brand is discovered, considered and, ultimately, chosen.

Below is an illustration of what that might look like for BT, a fictional brand of smart TVs:

1. Awareness / Discovery

Consumer prompts:

- ✦ “What are the best 4k TVs for small apartments?”
- ✦ “Which TV brands are known for sustainability or energy efficiency?”

How BT wins:

BT ensures its product information is optimized for AI readability—complete metadata, structured product feeds, and verified sustainability claims across trusted sources. This allows conversational systems to surface BT alongside better-known competitors during general awareness searches.

2. Consideration

Consumer prompts:

- ✦ “Please compare BT smart TVs vs. Samsung vs. LG for gaming.”
- ✦ “What do reviewers say about BT’s brightness and picture quality?”

How BT wins:

BT provides transparent comparison data—input lag, refresh rate, energy usage—and maintains strong credibility through third-party reviews and expert partnerships. And positive discussions in community spaces like Reddit or YouTube creator reviews help supply authentic sentiment that some AI models factor into their recommendations.

3. Decision / Purchase

Consumer prompts:

- ✦ “Where can I buy the latest 55-inch BT OLED for under \$1,000?”
- ✦ “Please add the 65” BT Series U to my Amazon cart.”

How BT wins:

BT integrates directly with retail APIs and conversational commerce systems, enabling seamless hand-offs from query to checkout. Additionally, verified product availability, consistent pricing data, and strong post-purchase ratings help AI assistants confirm BT as a trustworthy, low-friction purchase option.

Conclusion: From Trends to Action

The last decade of marketing has been defined by movement: Constant upgrades, new solutions, emerging channels, endless changes, and perpetual motion, all in a frantic effort to stay one step ahead (or even just to stay afloat).

But movement alone isn't progress, and the next phase of the industry's evolution will be defined by where all that motion takes us.

The opportunity now is to take the lessons of the past decade and build something more stable, more transparent, and more human on top of them. 2026 will reward those who take deliberate action to find clarity amidst all that complexity. That work won't always be glamorous, but it will be transformative: Every dollar recovered from waste can strengthen publisher partnerships. Every hour saved through automation can be reinvested in strategy. And every authentic conversation can build the brand equity that tomorrow's algorithms will rely upon. Teams that take the time now to plan and refine their systems for that future will move faster when it matters, and the brands that align human connection with technical fluency will become the ones consumers—and their AI assistants—seek out first.

If the last 10 years were about expansion, the next 10 will be about intention. The industry's greatest challenge—and its greatest opportunity—will be to channel all that motion into meaning.



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