

ECI Media Management's

Top 10

media

predictions

for 2026

As 2026 comes into view, advertisers are contending with multi-layered pressures, including - but certainly not limited to - economic and political uncertainty, AI disruption, persistent media inflation and the relentless fragmentation of media and technology. Agencies are implementing new ways to fuel the bottom line, from consolidation to proprietary media and Software as a Service (SaaS), while platforms hold data and identity closer to their chests and frontier channels such as retail media and TV deliver measurement challenges.

Against this unsettling backdrop, the pursuit of transparency will become the defining challenge of 2026 for advertisers. Without transparency, it is impossible to verify performance, challenge waste or, ultimately, make confident investment decisions. It also undermines the trust between client, agencies and platforms – and it is trust that provides the foundation for successful advertising. Transparency isn't a standalone strategy, but a theme that must shape a brand's approach to all its media activity, from strategy to implementation and measurement. It must form the basis of the agency relationship, ideally from the pitch stage and certainly the contract; disclosure around proprietary media practices, the use of AI in planning and buying (and the implications on FTE numbers) and how tools operate will be important areas to address. Platforms must provide clarity around the data used for targeting and optimization – and advertisers should encourage and support the creation of cross-platform standards for measurement and independent verification.

Trust between clients, agencies and vendors is the foundation of successful advertising – but there can be no trust without transparency. That is why, in a fracturing landscape, advertisers who demand a clear understanding of how decisions are made and how value is created will be the ones who enjoy the greatest brand success.

In this white paper our experts have drawn on their expertise and experience in the media industry to share their top predictions for the media industry in 2026, to support advertisers as they prepare their brands and their investment strategies for the year ahead.

For ECI's 2026 media inflation forecasts and the dynamics shaping them, see our recent **Media Inflation Report**.



1. **Agency and media company consolidation will raise questions around money and power**

Industry consolidation will be a dominant influence in advertising in 2026, reshaping both media agency groups and media vendors in ways that affect choice, competition and pricing for advertisers. It will play out differently across the ecosystem, affecting choice between media agencies, altering how supply, content and distribution are controlled among media vendors, and continuing the concentration of power for the tech platforms.

Media agency consolidation: choice, pricing and efficiencies

The most immediate development for many advertisers is the recently confirmed merger between Omnicom and IPG. Taken together, the combined Omnicom Media/Mediabrands entity, WPP Media and Publicis Media would influence around a third of global media investment, reflecting the growing concentration of spend within the largest agency groups (drawing on COMvergence's 2024 Global Billings and Market Share report). This will likely significantly reduce competition and limit true choice for any advertiser that requires global consistency. The new combined group's scale will accelerate the standardization of tools, processes and pricing models – and that will make it harder for advertisers to differentiate between agency offerings. Reduced competition in the media agency marketplace will also likely drive up fees and media costs, leading to questions around whether this merger will drive efficiencies for advertisers, as emphasized by the groups involved, or simply concentrate power within a smaller number of hands.

Media network mergers: reach, inventory and control

Consolidation will also shape the media network sector in 2026 and beyond. Nexstar has confirmed its acquisition of Tegna, potentially bringing it into 80% of US households. Even more significant, however, is the evolving Warner Bros. Discovery (WBD) purchase. At the time of writing, it has just been announced that Netflix will buy WBD's studio and streaming assets in a deal said to be worth \$83 billion; Paramount Skydance has since launched a hostile counter-bid of around \$108 billion for the entire company, including the linear channels excluded from the Netflix offer.

The wrangling continues, but what is certain is that, whichever way the pieces fall, the consequences will be felt across the media and advertising industries. The potential benefits for advertisers will likely include simplified buying with integrated studio, streaming and rich data packages, with improved targeting and more precise measurement. The consolidation may initially provide cost-efficient access to larger audiences; that said, reduced competition may drive up pricing. There are other significant challenges for advertisers: over-reliance on a single giant platform for reach could increase vulnerability to changes in pricing and data policies. The splitting out of streaming and linear assets will also be a cause for concern for brands with campaigns that rely on traditional TV reach.

Tech platform dominance: targeting, reach and data

Advertisers are used to navigating marketplaces dominated by giant players. The online media sector is dominated by an extremely powerful triopoly; Alphabet, Meta and Amazon are between them set to control over 56% of the global digital

ad market in 2026. This market dominance means that advertisers are reliant on these platforms for mass online reach: the trade-off for greater targeting efficiency and reach is reduced pricing competitiveness and weaker negotiating leverage and dependence on opaque, black-box data.

2. AI will drive a shift towards outcome-based compensation models for agencies

Artificial intelligence is driving a fundamental change in how agencies operate. AI-powered workflows will reduce the manual hours needed from human planners and buyers, making hourly rates less relevant. This will in turn create a need for fee models to recognise value and results, rather than time and effort as in traditional approaches based on FTE structures and roles. Alternative models include deliverables, tools subscription or outcome-based, for example looking at marketing, sales or business metrics. Some agencies may implement hybrid models. This change in compensation model will be driven by agencies but also by their clients, who will demand clarity on where and how AI is used on their business, how much human oversight is involved, and whether it delivers better results or just more opacity. In this new era, advertisers must still insist on having the agency's A team, and not just their AI team.

3. Proprietary media will continue to be a major revenue engine for agencies

Proprietary media, also known as inventory or principal media, has been in the spotlight following reports that a former executive at one of the holding groups filed a lawsuit against his former employer, alleging he was wrongfully dismissed for whistleblowing about their proprietary media practices. It is likely to become even more prominent in 2026, driven by both structural shifts in the industry and by the commercial realities facing agency groups. The merger between Omnicom and IPG will create scale advantages which will make proprietary bundles an even more powerful income generator for them. Larger upfront commitments will allow them to layer proprietary data or attention metrics over proprietary bundles, particularly in retail media and CTV which are fragmented, growing rapidly and have opaque pricing, and sell them on to clients positioned as 'tailored' or 'high-performing' packages. Any benefit derived from convenience and reach could be offset by the lack of transparency.

In a complex media landscape, media agencies are more important than ever, so it's crucial that brands forge a mutually beneficial, long-term strategic relationship with their agency partners. The emphasis should be on trust, transparency and performance - which means the agency should declare when they are operating as principal rather than agent, how inventory has been sourced, what mark-ups apply and whether the product complies with the contract. Audit clauses will be essential as benchmarking the cost and quality of inventory media is the key to driving transparency.

4. Software as a Service will become an important agency income generator

As AI powers more and more media agency services, affecting fee models and therefore revenue, agencies are responding by seeking new ways to generate



income that don't rely on people. One such way is by packaging technology and tools as a product to sell to clients – often on a recurring, subscription-like basis. Software as a Service, or SaaS, is a key strategy for agencies as it not only opens up a revenue stream, but, if a brand's workflow, data and processes are tied into a tool, it can be difficult and expensive for them to change agencies. Agency group purchases, including Epsilon (Publicis), Merkle (Dentsu) and Flywheel (Omnicom) underpin the focus on this as a revenue generating strategy; these companies provide the infrastructure to build and monetize SaaS platforms and the ability to control the inputs, processes and outputs of media investment.

Although there are undoubtedly advantages in this approach for clients, there are potential issues to be aware of. The most obvious and important one is how SaaS has the potential to blur the line between independent strategic advice, and selling a proprietary product. It can also have implications for transparency, with black-box algorithms, AI-driven optimization and embedded partnerships with media vendors, as well as the automated routing of investment. Advertisers should insist on full transparency for every aspect of the tool: pricing; documentation of how it works; performance benchmarking; and contractual causes that include rights to audit, benchmark and access to data – ideally, data ownership should stay with the brand. And finally, advertisers should build up internal capability so the tool does not become irreplaceable.

5. In-housing will become a strategic imperative as brands take back ownership

Advertisers will increasingly look to in-house their research and strategic media resource in 2026, driven by a need for greater control in an industry shaped by AI, walled gardens and opaque media practices. In-housing allows for the construction of an independent evidence base without the concern that research may favor the platform or agency providing it. We will also see measurement move in house so that marketing, procurement and finance teams are all working from a single source of the truth.

The shift is made possible – and indeed is being accelerated – by AI, which makes smaller in-house teams more feasible and dramatically reduces the investment needed to get them off the ground. These small, agile teams can own the long-term media strategy and principles for their brand, whilst outsourcing execution to their agency – and that shifts the power balance in the advertiser's favor.

Brands considering in-housing strategic capabilities must ensure they have clarity about the decisions they want to own internally – for example, media principles and measurement standards – and that they have the data, tools and talent to support consistent use and application of those capabilities.

6. Retail media's continued maturation will see it become a core media channel

Retail media is the third wave in the evolution of online advertising, following the trajectory of first search and then content. It has become a mainstream priority for advertisers, attracted by its power to engage consumers directly at the point of purchase, when they are already in a 'buying' mindset.



But retail media is still maturing. It has typically taken the form of onsite ads – that is, display placements on a retailer's own properties, targeting shoppers at the point of purchase. Its proximity to purchase is key to its success, but the finite nature of onsite inventory has prompted the retail media networks (RMNs) to expand beyond the confines of their own properties, leveraging rich first-party data for offsite campaigns that can be precisely targeted and personalized, on channels not covered by onsite, including display, video, CTV, social and audio. Retail media has traditionally been used to support sales objectives at the bottom of the marketing funnel, but its expansion into offsite channels that support brand objectives means that it is now effective across the entire funnel, including awareness and consideration.

The increased preponderance of retail media in media investment strategies will bring closer scrutiny on data usage policies, for both advertisers and RMNs. As RMNs harness the power of their shopper data across their platforms and into other channels, advertisers must be confident that privacy standards, consent frameworks and data governance are robust and upheld; clarity on these issues will be as important as performance.

The expansion into offsite, as well as developments such as in-store digital inventory, is what is positioning retail media as such a potent force in 2026. It will attract an increasing share of online ad spend – but with increased spend comes the imperative to apply higher quality standards, as with any other channel. Viewability, brand safety and contextual relevance must be safeguarded, to avoid the risk of wasted spend and reduced marketing performance.

For more about the key retail media trends in 2026, see our [recent white paper](#).

7. CTV will explode – highlighting the need for consistent measurement

CTV advertising is seeing an explosion, in both inventory and the sheer quantity of ad dollars it is attracting. In the US, CTV ad spend is forecast to reach nearly \$38 billion in 2026 – around 40% of total TV ad spend. This fast-paced growth is matched in some highly advanced markets such as the UK and parts of Northern Europe, but others are in the earlier stages of adoption.

This change will in part be accelerated by the streaming platforms themselves; Netflix's ad load on its ad-supported tier, for example, has increased to about four or five minutes per hour, and it claims to have 190 million monthly active viewers, which it defines as watching at least one minute of ads per month. It is also experimenting with more flexible, marketer-friendly formats to attract greater investment from brands.

As CTV attracts increased eyeballs and ad dollars, the challenges around inconsistent measurement become increasingly obvious. There is currently no industry standard for how CTV impressions, viewability or completions are counted. Furthermore, because each streamer controls its own environment and rarely shares user-level data, advertisers have far less control over reach and frequency than they do on linear TV or online video. Finally, data sharing is

inconsistent and often limited, meaning advertisers can't independently verify who saw an ad or deduplicate across platforms; this opacity is an increasing concern.

There are, however, some promising solutions emerging. One is unified ID approaches, which create a single identity framework across multiple publishers so advertisers can manage frequency, reduce audience overlap and compare impressions on a like-for-like basis. While not yet perfect, they do represent the first real attempt to bring coherence to CTV identity and measurement. Other solutions include independent verification tools produced by measurement companies such as Nielsen, DoubleVerify, Comscore and IAS. They provide objective analysis (as opposed to platform-reported metrics) that validates viewability, whether the ad was played on a real screen, whether it reached the intended audience, and frequency.

8. AI search summaries will transform how brands approach SEO

AI-generated search summaries, such as Google's AI Overview, are transforming how consumers interact with Google, and will mean that advertisers need to rethink their search strategies in 2026 and beyond. For many years, search has been link-based, but is increasingly conversational and interface-based. Around half of Google searches already trigger an AI summary – and that is expected to exceed 75% by 2028.

This represents a seismic shift in how consumers form their purchase decisions; the summaries push search results further down the results page, compressing visible real estate and reducing visibility for both ads and organic results – driving down click-through rates. With users increasingly obtaining satisfactory answers to their search queries without the need to scroll, traffic to websites is likely to decline, and remaining clicks will increasingly come from more informed consumers who are further down the purchase funnel – although these will be fewer in number, they would be higher quality thanks to higher intent. Higher CPCs will result from fewer impressions and unchanged demand.

For advertisers, success will depend on adapting search strategies to new AI-native experiences. This could include testing emerging formats that appear within or alongside AI summaries, relying more on Google's automated, signal-based targeting and optimizing for longer, conversational queries. Traditional SEO alone will not guarantee visibility; brands will need to build clear credibility and authority on the topics that matter to their customers, as this will make Google more likely to surface their information within AI-generated responses – also known as 'generative engine optimization' or GEO.

9. Effectiveness will be redefined to reflect real consumer behavior

Advertisers will evolve how they measure effectiveness in 2026, moving beyond traditional metrics and basic digital signals to adopt broader, behavior-based measurement frameworks. Greater emphasis will be placed on understanding consumer behavior and how to invest in media so that it genuinely delivers against brand objectives.

Metrics such as CPM, reach, frequency and affinity will no longer be sufficient on their own; marketers will look to evolve their media and marketing KPIs, incorporating attention metrics, completion rates and engagement levels, and link them to short- and long-term brand and sales impact. They will need to ensure that, wherever possible, metrics are consistent across channels and that vendors can validate quality and not just quantity. Independent measurement and KPI-setting can help ensure that rich data leads to better decisions instead of complexity.

10. Flexibility has never been so important

Marketers are required to constantly juggle an unprecedented number of variables to drive the best possible value for their brands. A fragmenting media landscape, the rapid rise of AI, media pricing inflation, major sporting events and pivotal elections create layers of complexity, while the global political and economic backdrop remains deeply uncertain. In this environment, rigidity will be a serious disadvantage. The brands who thrive will be those who put flexibility at the heart of their approach to advertising, with investment guidelines rather than fixed allocation, scenario planning that anticipates and plans for disruption, and the ability to respond quickly and with agility to competitor activity and market dynamics. Ultimately, flexibility will be the critical differentiator in 2026 and likely beyond.

There are myriad ways in which the media ecosystem creates inscrutability – because it is in that fog that many players can drive greater profit margins. But for advertisers, transparency isn't optional – it's the foundation for success, and they must demand clarity on spend, value and data.

As advertisers navigate the evolving landscape and the transparency challenges that come with that change, benchmarking, KPI frameworks, and independent analysis and verification can support confident decision-making and ensure that every ad dollar drives business value.



About ECI

ECI: HIGHER MEDIA VALUE

Technology is transforming the media landscape at an unprecedented pace. But in the right hands, change can be a force for good. ECI, the market's fastest growing global media management company, leverages these changes to help you drive higher media value from your advertising investment.

A modern, forensic approach

Ever since our formation we have championed a modern approach to media and financial auditing. As pioneers in the field of digital auditing, we include sophisticated analysis of programmatic activity in our audit model, and we pride ourselves on a forensic, fact-based approach which harnesses the power of our world-class talent and proprietary technology. Along with our innovative benchmarking capabilities, we are confident in our ability to empower our clients to drive higher media value and media-led impact on business performance.

Cutting-edge services

Capitalizing on today's dynamic, fast-paced media landscape to drive higher media value

requires data-driven decision-making, global experience and a deep understanding of the latest technologies. At ECI we are proud to be able to offer these and so much more. Our promise to our clients is that we will deliver actionable insights on their media investments in a timely fashion, and that we will always balance cost and quality KPIs to drive maximum media impact and value. We partner with advertisers to support their agency pitches and contract negotiations, identifying fee models that cultivate transparent, productive partnerships and deliver stronger outcomes.

Global experience, local expertise

We are proud of our client portfolio, which contains some of the world's largest and leading advertisers. Our network of owned offices and leading affiliates supports them where they need us, across the Americas, Europe and Asia Pacific. We offer them high-level media intelligence and rigorous benchmarking and, ultimately, the insight, experience and savvy to ensure that their advertising investment and agency relationships drive higher media value.

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