



WPP Media Trends

UK 2026

IN THIS TRENDS EDITION

CREATORS UNLEASHED GAME ON INVISIBLE SHOPPERS
INTERFACES REIMAGINED MARKETING SUPERPOWERED



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Welcome to WPP Media's UK Trends 2026 report, which identifies areas of innovation to watch in media, marketing and tech for the year ahead.



Sophie Harding
Head of UK Futures
and Innovation

OUR APPROACH

It's our 12th year of tracking approximately 20 trends, which we continuously refine. This year we are highlighting five feature trends across three different types of innovation – Platform, Experience and Operational Innovation.

To produce this content, we begin by having extensive conversations with our media partners (over 40 of them this year). This ensures we highlight truly practical, actionable strategies that can be implemented in collaboration with clients in the coming year. We then enrich this with our deep expertise from across the business, involving strategists, planners and channel experts, to pinpoint and then create content for the areas of innovation that warrant in-depth exploration. It doesn't stop there. We also rigorously stress-test the consumer-facing elements of these trends via a week-long ethnography project and a comprehensive 3,000 person survey, engaging consumers across all tech adoption levels.

Please contact us if you wish to explore any specific topic in more detail – whether a feature trend or one of the many non-feature trends we also track extensively.

Our 5 feature trends to watch in 2026.

This year, we're tracking innovation across three key pillars.

PLATFORM INNOVATION

Focusing on evolving formats and channels, such as:

- **Game On** – Gaming matures as an ad proposition
- **Creators Unleashed** – The power of creators has been unleashed and their role in the marketing mix is being reassessed

EXPERIENCE INNOVATION

Applies cutting-edge AI, immersive, and conversational interfaces to deepen audience engagement, including:

- **Interfaces Reimagined** – AI is re-writing the very fabric of how we interact with technology
- **Invisible Shoppers** – AI agents are the stealth shoppers set to reshape marketing as we know it

OPERATIONAL INNOVATION

Leverages AI and data for unparalleled efficiency and insights for both our clients and teams, highlighted by:

- **Marketing Superpowered** – Advances in data and AI are combining with human smarts to create powerful new marketing superpowers



CREATORS UNLEASHED

GAME ON

INVISIBLE SHOPPERS

INTERFACES REIMAGINED

MARKETING SUPERPOWERED

Navigating the Human-AI Frontier in 2026.

What strikes us most profoundly in this 2026 report, is just how deeply Artificial Intelligence (AI) now permeates every trend we explore; a significant shift even compared to five years ago. While AI is reshaping every facet of our media trends, it paradoxically accentuates the enduring importance of more human elements. Qualities such as trust, authenticity, creativity and fun emerge as more critical than ever. This defines the new world we are navigating – a frontier where brands and consumers alike must learn to operate within new landscapes. AI acts as both a powerful enabler but also a critical challenge, constantly evolving how we connect and interact. The balance between human and machine in marketing will need to be carefully crafted.

Take *Game On*, for example, where marketing success will hinge on balancing AI-driven measurement and programmatic efficiency with a deep understanding of human player culture, user generated content, and community-centric engagement. Similarly, *Creators Unleashed* sees creators evolving into new media powerhouses, building impactful ecosystems grounded in authenticity and humanity, while simultaneously navigating the delicate balance of integrating AI tools within an increasingly AI-fuelled content landscape.

In *Interfaces Reimagined*, we investigate how AI is re-writing the very fabric of how we interact with technology. More intuitive, conversational and context-aware experiences are headed our way, and brands will need to adapt for these more natural and human-like interactions with technology. In *Invisible Shoppers*, marketers must grapple with the dual challenge of marketing to both machines and humans, as AI agents transform the online shopping journey. Finally, marketers will need to master the bionic combination of data, AI and human smarts to give them *Marketing Superpowers*.

Ultimately, the marketing world of 2026 isn't about AI replacing humanity but about mastering the dynamic tension and profound collaboration between the two. Success will belong to those who skilfully forge this equilibrium, ensuring technology amplifies, rather than diminishes the inherently human qualities of trust, connection and creativity.

We hope you find this report insightful!



CONTENTS

PLATFORM INNOVATION

- 01**
Game On 7
- 02**
Creators Unleashed 14

ADS WITH THAT?
VIDEO EATS THE WORLD
SEARCH PARTY
SHOPPABLE MEDIA
RETAIL MEDIA
SOCIAL UNREST
FANTASTIC FRONTIERS
MESSY MEDIA

EXPERIENCE INNOVATION

- 03**
Invisible Shoppers 26
- 04**
Interfaces Reimagined 34

HOME SWEET HOME
LOOK WHO'S TALKING
IMMERSE ME
REAL OR REPLICA

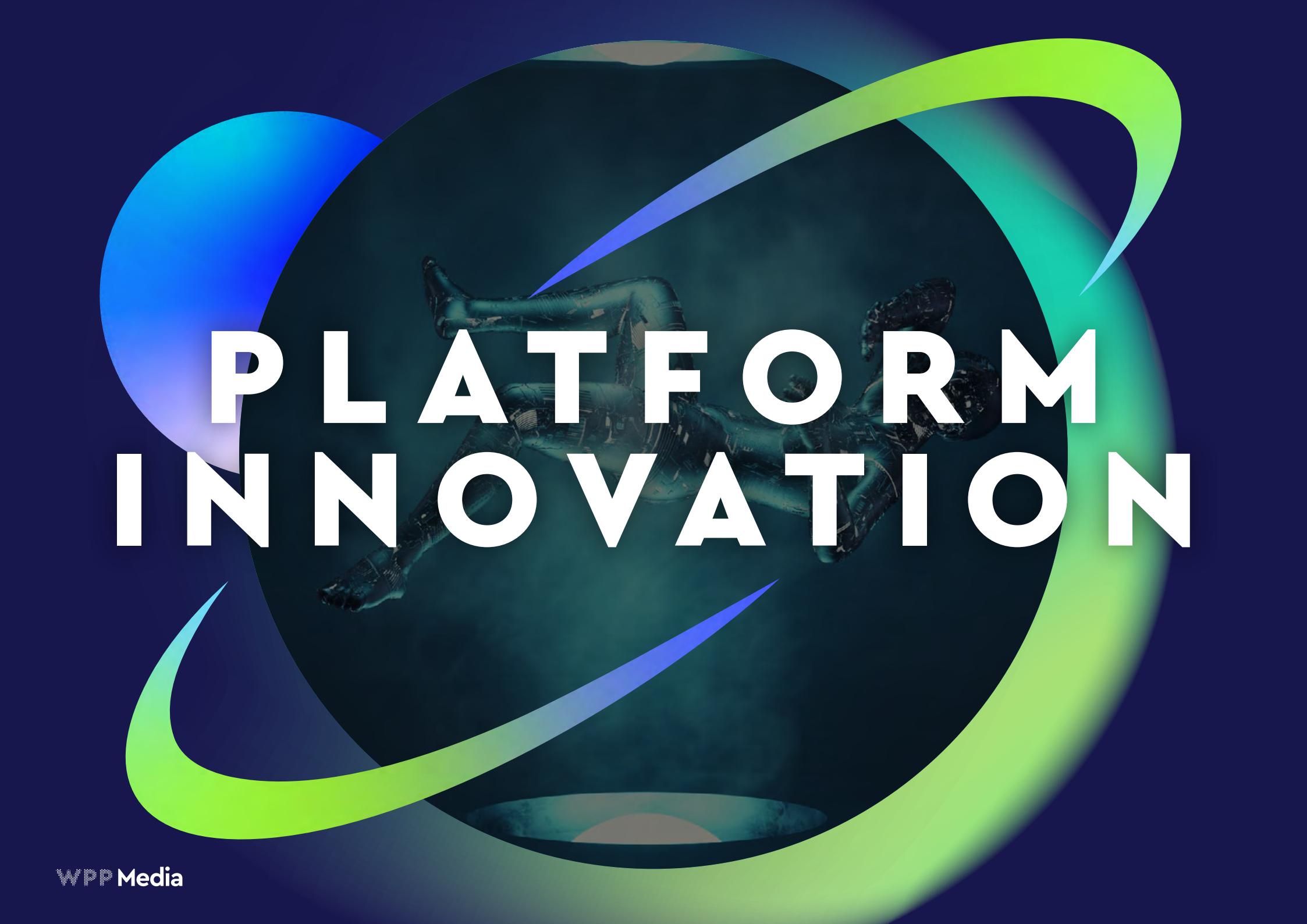
OPERATIONAL INNOVATION

- 05**
Marketing Superpowered 44

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PLATFORM INNOVATION

01

GAME
ON

Gaming matures as an ad proposition



We last featured *Game On* in the throes of the pandemic, as gaming truly shifted into mainstream consciousness. Five years later, with 3.6 billion global players, gaming is still thriving and rightly deserves a re-feature, as it continues to mature from both a consumer and advertiser perspective. Gaming has transcended traditional boundaries, evolving from a mere pastime into a dominant cultural force. Franchises like *Minecraft*, *Call of Duty*, and *Super Mario Bros.* now spawn record-breaking films and shape mainstream culture. With blockbuster sequels such as *GTA VI* due in late 2026, expect gaming to be at the forefront of the conversation more than ever.

For advertisers, gaming is the new cultural playground, amplified by a vibrant creator economy. New ad frontiers, seamless cross-platform ecosystems, and advanced commerce, measurement, and programmatic offerings are transforming gaming into a powerful performance-driven channel. The conversation has moved beyond just massive, engaged audiences. Focus is now on a revolution in advertising technology, measurement, and brand integration that makes gaming one of the most dynamic and effective channels available. No longer an experiment, more advertisers are on board than ever, with gaming companies increasingly tuned in to broadening their opportunities for advertising. Expect the conversation to shift from why brands should be in gaming to how they can win.

'Gaming isn't niche anymore, it's for all kinds of people'
% agree, all adults.

2024

50%

2025

59%



AREA TO WATCH 1

The Business of Play: Measurement, Programmatic, and G-Commerce

Gaming's next frontier is about transforming attention into actions and transactions, which will establish it as a powerful commerce and performance channel for advertisers. The wild west of in-game advertising is over. The launch of the IAB Gaming Measurement Framework in 2025 marks a pivotal moment, bringing standardised, transparent metrics to the ecosystem. This, combined with partnerships between measurement leaders like IAS, DoubleVerify, Kantar and Circana, with the likes of Activision Blizzard, Roblox and Anzu, means brands can now invest with confidence. Anzu is also activating retail media partnerships with Walmart, Target, and Nectar 360, enabling not only sales metrics but also exposure and shopper targeting all in one. The expansion of programmatic buying is unlocking rich, privacy-safe data environments for sophisticated audience targeting.



Platforms including Roblox are now accessible through Google's DV360. This allows brands to purchase newly launched formats like Rewarded Video Ads and Immersive Ads with metrics comparable to YouTube and TikTok. Microsoft's gaming inventory (King, Xbox, Microsoft Casual Games) is also available via Microsoft Monetize and other DSPs. Consequently, the possibilities for Dynamic Creative Optimisation (DCO) will also grow. Anzu's DCO offering is now in beta, which can be activated for use cases such as time-specific offers, tailored discounts, the retargeting of one-time purchasers or multivariate product ad testing based on shoppers' signals.

The final piece of the puzzle is 'G-Commerce'- focused on frictionless shopping. Direct-to-retailer cart integrations and "phygital" products (physical merchandise sold within a virtual world) are turning player attention directly into transactions. Walmart, for instance, has a brand shop on Zepeto, where millions of virtual items have been sold. Roblox's partnership with Shopify allows creators to sell physical merchandise directly within their experiences. The potential for in-game stores, personalised offers, and purchases with in-game currency or real-world payment methods is immense, moving gaming beyond engagement to direct sales.

These changes could shift gaming from 'innovation bucket' to a standard line item on the media plan in 2026. Brands such as Roblox are counting on it, shifting their focus towards these programmatic and ecommerce integrations, with the goal of becoming a \$1billion ad business, ultimately competing with Meta and TikTok in the longer term.

41%
of 18-34s have
brought virtual
items to use or wear
in-game.

AREA TO WATCH 2

The New Cultural Playground: IP, Fandoms, and Creators

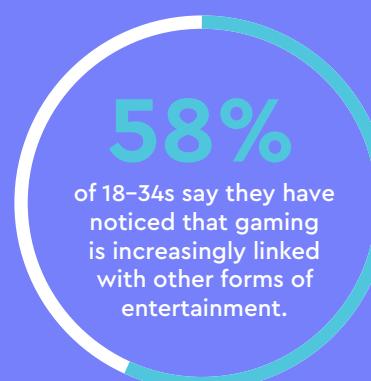
2026 is poised to be a big year for gaming, with blockbuster launches like GTA VI, (at a rumoured cost of \$1-2bn) and Resident Evil Requiem serving as key cultural touchpoints. Gaming's cultural impact needs to be taken more seriously than ever, with its influence now permeating everything including entertainment, sport, music, and fashion, led by strong game IPs.

Blockbuster adaptations, like the record-smashing Minecraft movie and an upcoming Call of Duty film in 2026, exemplify this trend. Music artists such as Charli XCX and Ariana Grande host immersive in-game concerts, shaping youth culture, while sports fandom increasingly thrives within gaming environments. Expect FIFA World Cup game integrations to be big business – with younger audiences often spending more time in these gaming environments than watching the matches themselves. This cultural shift presents new advertising opportunities for creative formats, branded merchandise and in-game music drops, but also interactions with fans that go far beyond the game itself.

The gaming landscape is increasingly powered by user-generated content (UGC). On platforms like Roblox and Fortnite, player-created worlds and games such as Grow a Garden, initially made by a 16-year-old, can attract millions of concurrent players, often outperforming studio-produced titles. User-Generated Content (UGC) is the most authentic and engaging content in the space and with more brands seeking in-game integrations, studios are trying to acquire the next UGC hit. Don't be surprised if AAA games, perhaps even GTA, follow suit with UGC elements too.



To incentivise creators further, both Roblox and Fortnite are providing more opportunities for creator monetisation. With Roblox's new programmatic solution, creators become advertising gatekeepers. They can't choose what ads players see, but they can include ad units within their experiences, deciding where they are placed. Fortnite is also overhauling its creator incentives, allowing creators to sell items directly from their islands. For the next year, creators will receive 100% of the V-Bucks value from these sales. In this new landscape, co-play is the new co-viewing. Brands that foster social connection and community, partner with creators, empower communities with tools, and authentically participate in fandoms (on platforms like Discord and Twitch), will earn the deepest loyalty.



AREA TO WATCH 3

Seamless Play: Cross-Platform, Cloud, and the End of the Console Wars

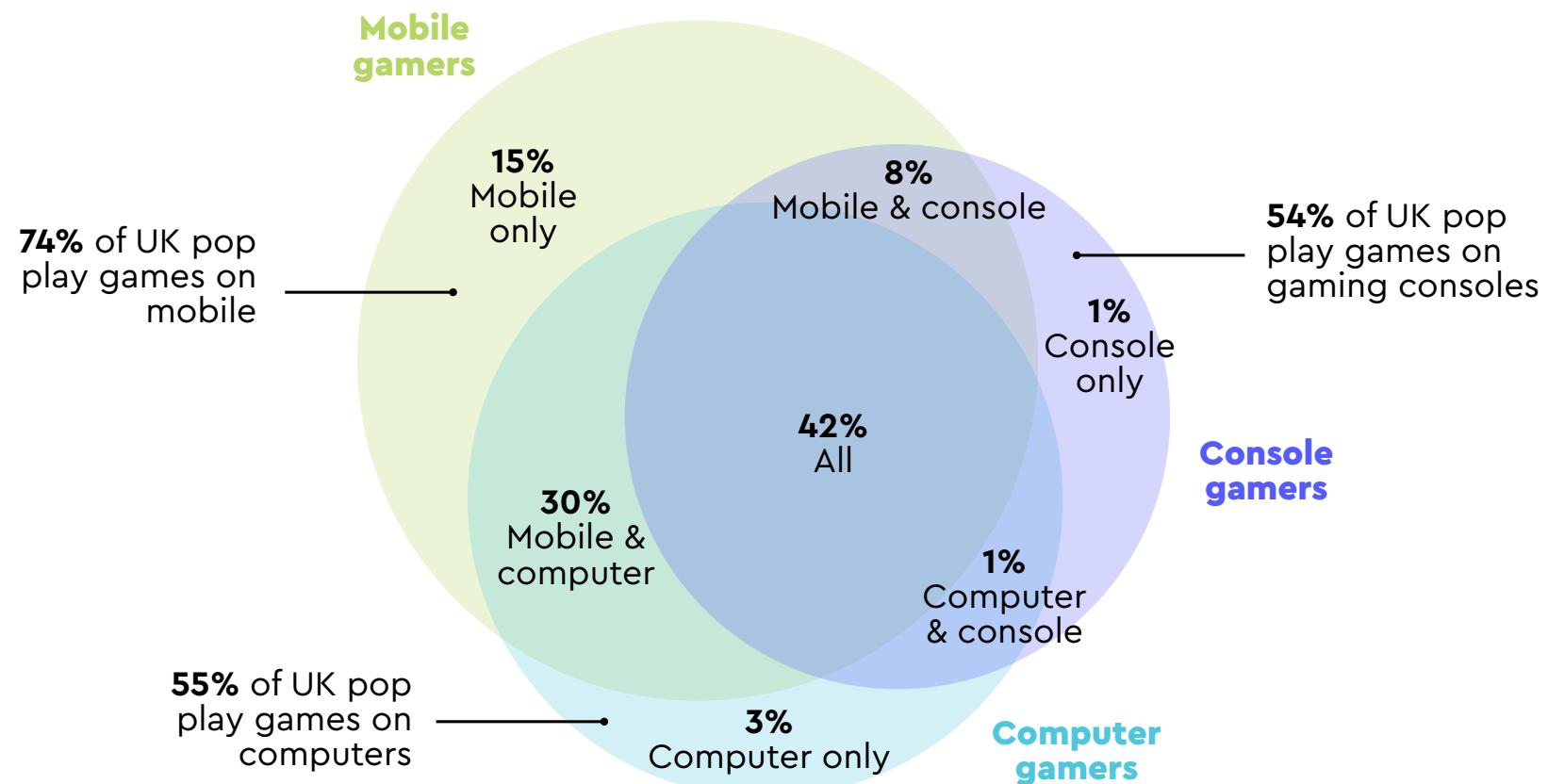
Gaming has moved beyond single devices. While mobile remains the largest platform and a gaming powerhouse, play across console, PC, and handhelds like Steam Deck and Switch 2 is now the norm. The walls between hardware silos are crumbling, unified by cloud gaming, which enables players to move seamlessly between devices and access content whenever and wherever.

Players now expect their games and communities to move with them. This shift is driving gaming company strategies. Take Xbox Cloud Gaming's 'any screen is an Xbox'-approach, where we see new partnerships with manufacturers like LG and Samsung integrating Xbox Cloud gaming into TVs, theoretically making any screen a console. In addition, Xbox already has more than 1,000 Play Anywhere games, with many more to come. Certainly, rivalry between the big players such as Xbox and PlayStation has evolved. Now it's not about the number of devices sold, but about dominating the streaming frontier. But there are also other competitors working to gain share through their networks. Roblox is now available on more platforms than ever and although Google Stadia has been discontinued, other big digital players are trying to grow their share by investing in better access to their content. Netflix is working on seamless access to its games within its own ecosystem across any device and Apple has just released Apple Games, meant to act as a hub for every game that players have downloaded across their Apple devices.

For advertisers, this impacts not just where they advertise but how. Along with multiple device usage comes the opportunity to reach people in different gaming moments and mindsets. According to Activision Blizzard's Daypart study, not only do gaming sessions become longer as the day unfolds but platform use evolves accordingly. Mornings are predominantly driven by mobile gaming in short breaks, transitioning to more immersive PC/console sessions later in the day. Players choose platforms based on context. Success lies in not only understanding but adapting to this. A quick mobile session requires a different creative approach than an immersive lean-in living room experience on a console. Overall, this platform-agnostic reality demands a new, integrated approach from advertisers. Campaigns can no longer be 'for console' or 'for mobile'; they must be for the player, wherever they are.



Gaming device overlap



Base: All respondents (n=3190)

BRAND CONSIDERATIONS

IDENTIFY GAMING'S ROLE IN YOUR STRATEGY:

Unpick how gaming can be most conducive to your wider objectives (e.g. a way to reach new audiences, to deepen engagement or to drive consumer actions) and let this be the primary driver of your approach.

DEMAND MEASURABLE ROI:

Utilise new measurement frameworks and partnerships to track campaign performance, sales lift, and brand impact within gaming environments. Treat your gaming investment with the same rigour as any other media channel.

• TAP INTO THE BROADER ECOSYSTEM:

Leverage in-game media as a gateway and explore the wider infrastructure of gaming influencers, UGC, IP collaborations, virtual brand experiences and GCommerce.

THINK 'GAMER NATIVE':

Don't just place ads in games; understand the culture. How can your brand make a contribute to the gaming community instead of just interrupting it? Consider the value exchange you are creating for players when entering their spaces.

BE PLATFORM-NEUTRAL:

Identify the partners that deliver the scale and depth of engagement against your specific audience, and design executions that are both authentic to your brand and leverage each platform's unique context and mindset.

02 CREATORS UNLEASHED

The power of creators
has been unleashed and
their role in the

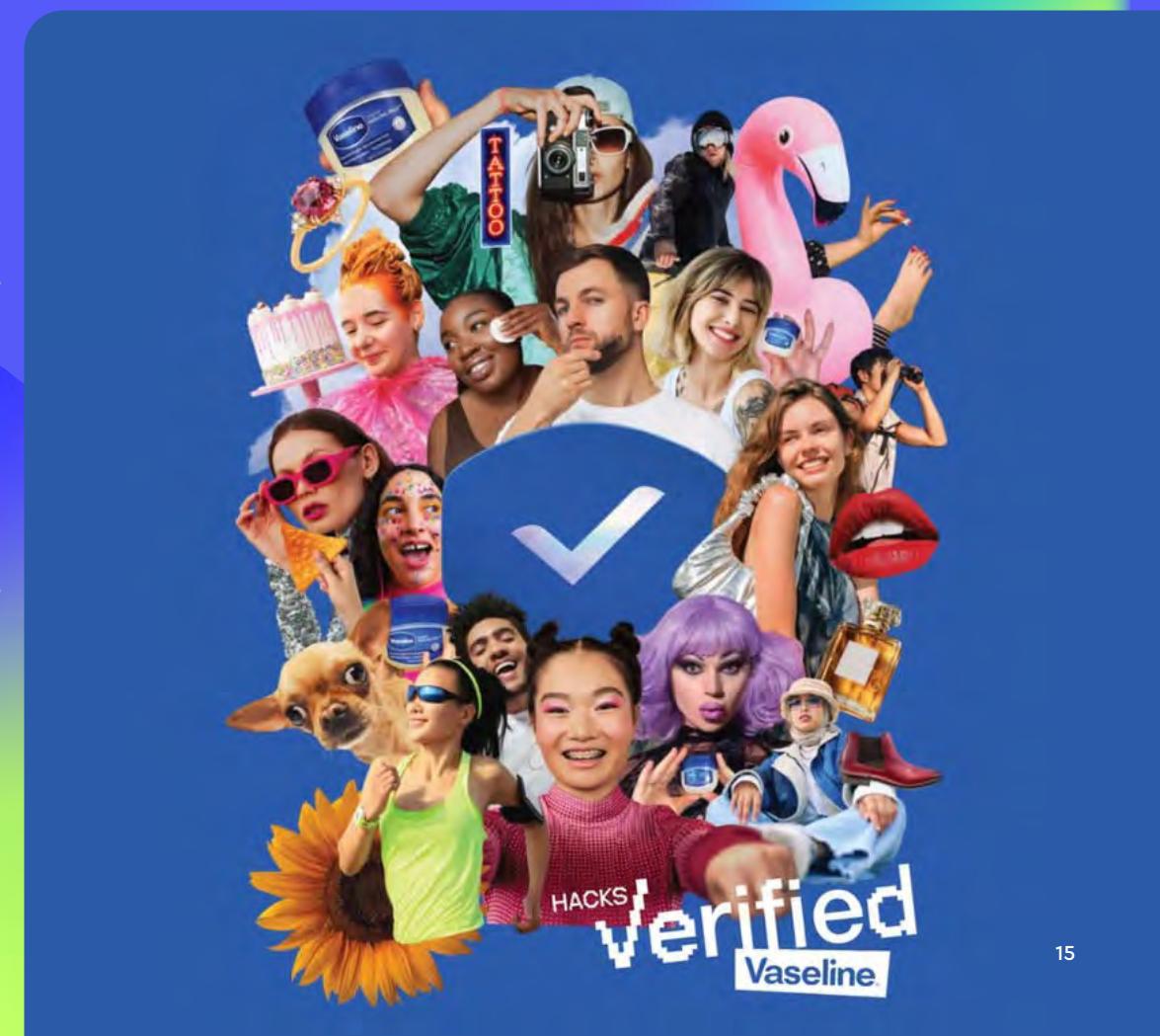
marketing mix
is being
reassessed

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Over the last five years, our *Significant Strangers* trend has consistently highlighted a fundamental shift in consumer trust towards authentic, user-generated content, with creators at its core. But now, the creator economy has matured to such an extent that it is the established foundation of a new media order (and worthy of its own feature trend). The IAB now forecasts the UK creator economy to reach a staggering \$2.64 billion by 2030, growing at an annual rate of up to 40%.

In 2026, marketers will be reassessing their creator marketing strategies. The conversation has evolved from if brands should engage with creators to how deeply they must integrate them into their core strategy. We've gone from tactical experimentation to strategic necessity. Landmark commitments, such as Unilever's pledge to adopt an 'influencer-first' strategy, signal a new era where creators are not just an add-on but a central pillar of marketing.

No longer simply influencers or content producers, creators now shape what people watch, trust, buy and search. They have grown into deliberate architects of influence across multiple platforms and formats, growing invaluable communities and fandoms in their wake. In addition, they have also evolved into media powerhouses, orchestrating their presence across diverse ecosystems where the lines between social, broadcast, commerce and search have become increasingly blurred. In a world where AI content might also increasingly call the shots, the authenticity and humanness of genuine creators could have much to offer.

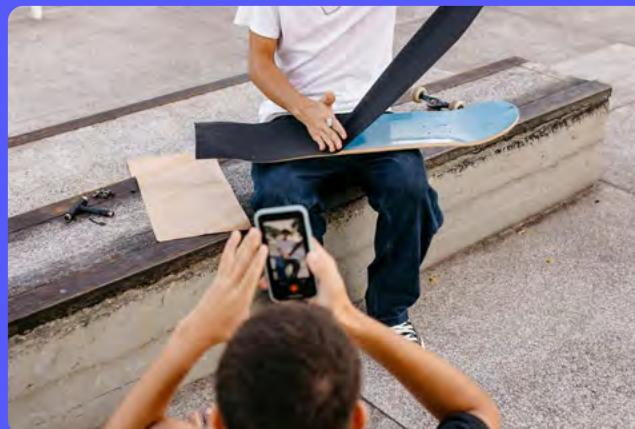


AREA TO WATCH 1

Creators as the New Architects of influence

The era of defining a creator by a single platform is over. Labels like 'YouTuber', 'TikToker', or 'podcaster' are increasingly outdated in 2026. Today's most influential creators operate not merely as content producers, but as the central star and strategic architect of their own sophisticated media ecosystem, leveraging a portfolio of channels. These are business-minded individuals, with every move considered and every platform and format chosen for a specific purpose.

This omnichannel approach is both an art and a science. YouTube often serves as home for flagship "broadcast" content; TikTok and Instagram for daily commentary and viral, short-form storytelling; and platforms like Discord and Substack for nurturing dedicated superfans. This multi-platform strategy deliberately de-risks their business from algorithm volatility and optimises assets and reach across touchpoints in meaningful ways for their audiences. New formats on these platforms also offer new opportunities. Consider



the opportunities for vodcasts, as Spotify partners with Netflix to bring a selection of its content to the streaming platform. We also see a significant shift in consumer behaviour on social platforms - a move from "*mindless scrolling*" to "*intentional consumption*". This is prompting the growth of longer form content that people seek out, rather than just discover in their feed. Short-form still remains dominant, but younger audiences increasingly desire deeper, richer content.

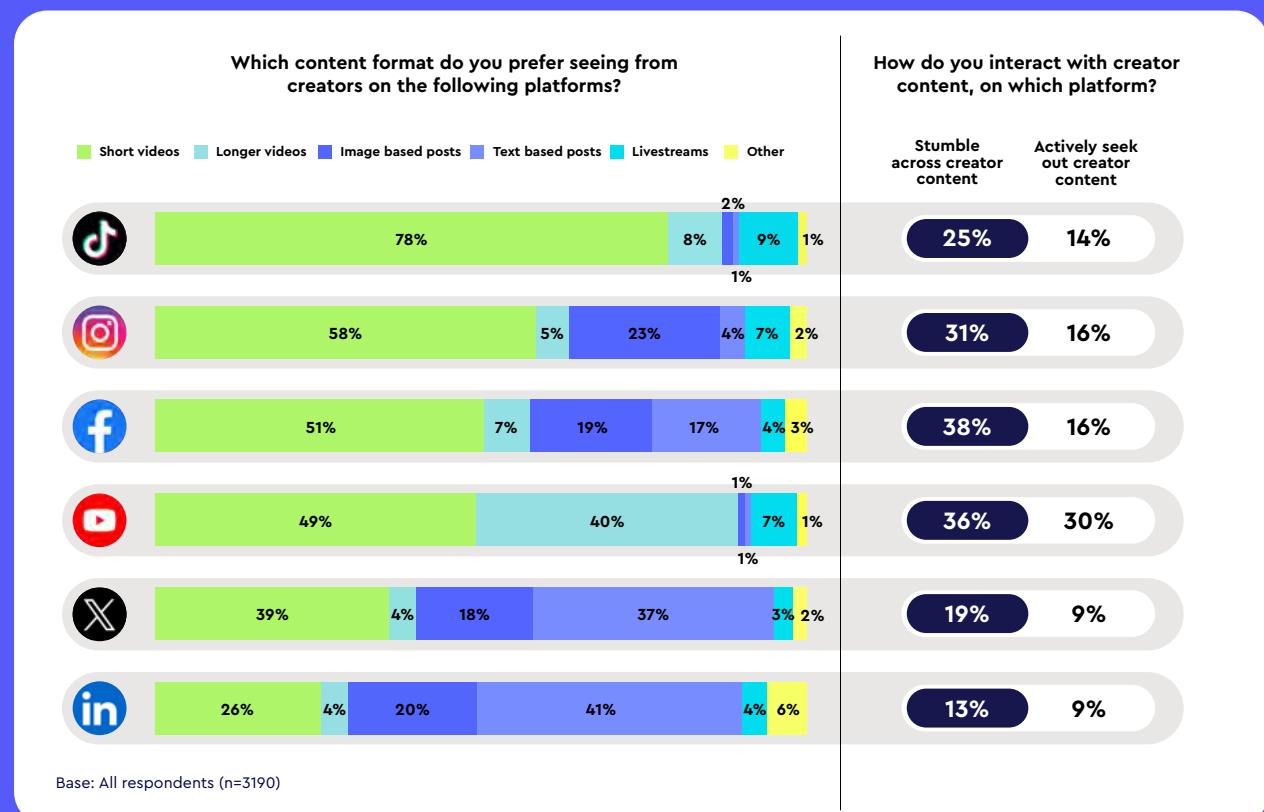
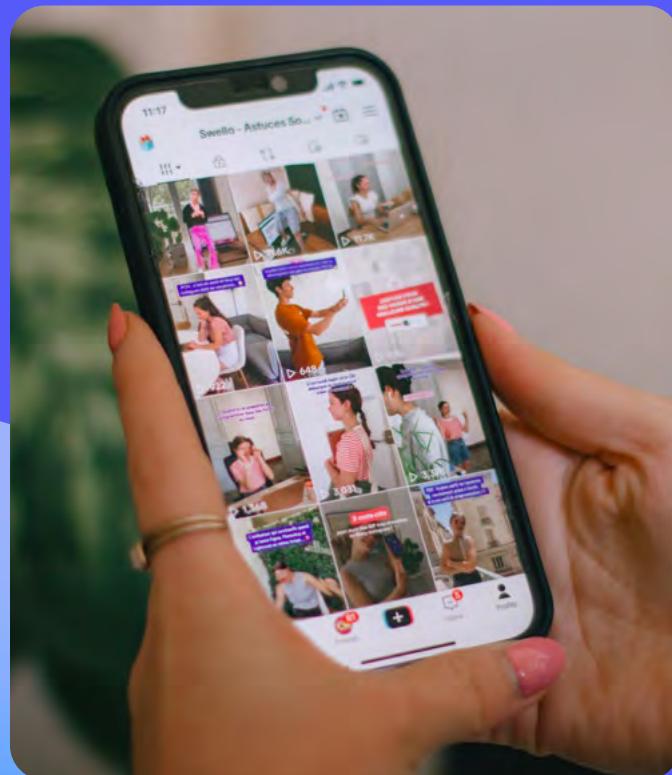
Substack and YouTube deep dives are thriving, and we are witnessing the growth of long-form content on platforms traditionally known for brevity. Threads is now expanding into long-form posts and audiences are becoming deeply invested in long-form, episodic series delivered in bite-sized chunks on platforms like TikTok.

These types of 'micro-dramas' are so popular in China on apps like ReelShort and DramaBox, they are now attracting Hollywood investment. Creators are not just adapting to these types of new formats, they are strategically maximising the opportunity, meticulously planning their content strategy to align with evolving audience demands.

At the core, creators masterfully leverage platforms and formats to grow and deepen audience connections, acting as the indisputable gateway into vibrant communities and fandoms. Fuelling and maintaining deeply engaged communities is the key to a creator's sustained success. Platforms have long understood this. As they compete even more fiercely for creator talent, they continue to provide more tools that not only enhance creator stickiness, but actively cultivate community engagement. YouTube, TikTok and Substack are all doubling down on community features.

Navigating this new reality of creator marketing demands a fundamental shift in mindset and strategy. Partnerships with omnichannel creators are investments in their entire ecosystem, not just isolated campaigns. The creator brief must prioritise multi-platform, multi-format storytelling with community engagement at its heart. Rather than single, fleeting creator activations, brands will be increasingly looking towards long-term authentic partnerships, as Unilever has with its cleaning products and #homewithroo. Reach has been displaced by audience engagement as top of the agenda for brand-creator partnerships. Nano and micro influencers are becoming ever more popular with advertisers. Whatever the route, it is imperative that all creator activity be tied together with a red thread of consistent messaging.

Robust data increasingly supports this strategic approach to creator marketing. A study of over 220 campaigns by WPP and the IPA highlights the powerful long-term ROI of creators, often surpassing traditional channels. Crucially, unlike other media channels, ROI correlates not with spend or volume of presence, but with brand-creator fit and creative quality. The right creator strategy drives lasting brand effects.



AREA TO WATCH 2

Creators as Media Powerhouses

Creators now offer a powerful, interconnected full-funnel media proposition, encompassing not just social but broadcast, search, and commerce too.

Top YouTube creators like MrBeast have evolved into culturally relevant superstars and sophisticated entertainment brands, rivalling traditional TV networks in scale and engagement. With a fifth of people now watching YouTube on their TV sets (and growing), creator content can now migrate from phones to living rooms, fundamentally redefining what constitutes 'premium' entertainment. This broadcast opportunity will expand as TikTok and Instagram reportedly develop TV apps. Creator shows are beginning to look and behave like TV programming too, complete with loyal audiences, sponsorships, and ad integrations. YouTube's 2026 launch of performance-based dynamic ad insertion, means creators will be effectively selling a slot for a period of time, akin to TV.

This broadcast shift extends to sports rights, with Bundesliga and NFL coverage controversially moving to platforms like YouTube. Creators, rather than traditional commentators, now set the tone for major sports events. Athletes themselves are becoming influencers. Creators serve as a natural distribution channel for fan-driven audiences who no longer consume sports in traditional ways. Expect impactful creator partnerships (both big and small!) for the 2026 FIFA World Cup, set to be the largest spectator event in history.

The true power of creators as a media channel is revealed when their content travels. With Google and others now indexing organic social in search results, creator content has transformed into a long-term asset for search visibility. Authentic video reviews and detailed tutorials function as powerful SEO.

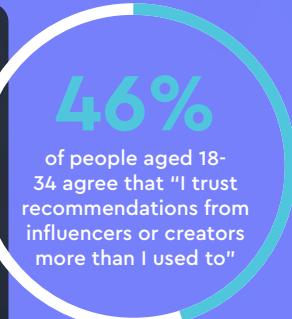
This influence will grow as generative AI prioritises social and community content, evidenced by Reddit becoming a top cited source across major AI platforms. Social platforms have become powerful search tools in themselves too. In this new search landscape, content will become the new currency, and marketers must adapt their approach to creator content. AI models will be picking up on language that resonates or describes what people want conversationally. Authentic product content, honest reviews, and clear descriptive storytelling will increase discoverability across both search and social.

Simultaneously, creator content has transformed into a dynamic, interactive storefront through seamless integration of tools like affiliate links, TikTok Shop, and live shopping. TikTok Shop is projected to surpass eBay in 2026, with mainstream retailers like M&S now adopting the platform. The best creators are skilfully turning storytelling into sales, as demonstrated by The Sidemen's Crayola clothing launch. Creators are now direct points of sale and a central part of the performance mix.

As creator marketing matures into a fully-fledged media proposition, measurement is evolving beyond vanity metrics and platform-native analytics to focus on brand lift, incrementality, and conversion. This signals a shift from proving value to optimising impact. Brands must integrate creator marketing across the entire media plan, with dedicated budgets and full-funnel frameworks that recognise its unique ability to build brand, drive sales, and win in search through authentic activations.

"The move towards people looking for answers on social media rather than Google is great for creators, it gives them a bigger market."

Male, 35-54, Midlands, mainstream tech adopter



AREA TO WATCH 3

The AI Creator Dilemma

The creator economy is on the verge of its own big bang, triggered by the mass democratisation of generative AI. Tools once exclusive to specialists are now playful and powerful in the hands of the public. With a single tap, Gemini's Nano Banana transforms photos, and a simple text prompt generates cinematic video shorts via OpenAI's Sora 2 or Google's Veo 3, rivalling professional content. Even Disney is allowing users to create and share short-form, AI assisted content, using Disney's own IP. This fundamental shift turns every consumer into a potential creator armed with a virtual production studio in their pocket – a major growth driver for the creator economy.

Soon, social platforms themselves may integrate AI creation tools. Meta has partnered with Midjourney for example. Platforms could also feature separate feeds for AI-generated content. Sora's app feels like a social platform itself, and users have already used AI to generate over 20 billion images in the 'Meta Vibes,' feed (in the Meta AI app). It will be interesting to monitor how much choice the user gets in what they see – Pinterest already offers an 'opt out' on AI generated content and TikTok is introducing a slider mechanism, letting users dial up or down the amount of AI content appearing in their feed. This will of course depend on how good platforms are at detecting AI generated content initially, something they are doubling down on. Also noteworthy are AI influencers themselves, who could even prove more effective at selling than real people. 'Granny Spills,' has garnered over a million views with one video alone.

The inevitable consequence is a looming content deluge. Social feeds, already governed by addictive algorithms, risk being flooded with an endless stream of synthetic 'AI slop'. But, dismissing all AI content as such can miss the nuance: people are active participants, finding joy and creativity in these new tools. The challenge isn't stopping this tide but navigating it and understanding where creator marketing fits in for brands.

Already 65% of the UK population say they are "finding it hard to tell what is real or what is synthetic content", a challenge exemplified by viral AI videos like bunnies on trampolines. But this problem fundamentally reframes the value proposition of creator marketing. For brands, the currency of trust has never been higher. In an ocean of AI-generated content, the humanity and realism of a creator become their most valuable asset. A creator partnership is now about buying a stamp of authenticity that cuts through the synthetic noise. While there are currently no regulations mandating AI labelling, the Advertising Standards Association (ASA) encourages it, aligning with the 77% of the UK population who agree that "any image or content that has been produced by AI should be labelled so". Brands will need to set out what they expect from their creators in this space, with clear rules on AI governance.

The smartest creators and brands will not view this as a battle of human versus machine but rather embrace a hybrid model. AI is reshaping the creator landscape, offering tools for content editing and audience analytics, whilst also enabling the emergence of AI influencers. The future lies in leveraging AI for both efficiency and creative enhancement, empowering human creators to do what AI cannot: build genuine community, share lived experiences, and create with a unique, authentic voice.

"Part of the reason I like the creators that I do is because they feel human and relatable, which would be lost if they were using AI to create their content."

Female, 25-34, South West England, Late Tech Adopter



BRAND CONSIDERATIONS

PARTNER WITH THE ECOSYSTEM, NOT THE PLATFORM.

A creator partnership is no longer a simple TikTok campaign. Rethink the creator brief for multi-platform and multi-format storytelling, including everything from 10 second clips to 30 minute deep dives. Play into each platform's strengths.

MOVE TOWARDS DEEPER, LONGER-TERM COLLABORATIONS WITH CREATORS

That are more likely to communicate consistent messaging, build lasting trust and drive deeper engagement.

ALLOCATE DEDICATED BUDGET FOR CREATORS AND INTEGRATE THEM INTO YOUR BROADCAST, SOCIAL AND COMMERCE STRATEGIES.

Creators are now full-funnel, broadcast platforms, long-term SEO assets and salespeople all in one. They must be treated as their own media channel, with a centralised, allocated budget.

EVOLVE YOUR CREATOR MEASUREMENT FRAMEWORK.

The days of judging success on follower counts are over. Turn to more robust measures such as ROI, brand lift, and sales, proving the commercial power of your partnerships.

PRIORITISE BRAND FIT, CONTENT AND AUTHENTICITY.

Brand fit, and creative content trumps spend for improving longer term ROI. Plus, the ultimate currency of trust in a world set to be flooded with AI-generated content, will be verifiable human stories.

How are our other 'Platform Innovation' trends doing?

FANTASTIC FRONTIERS

- Fandoms have grown from passionate audiences into powerful cultural engines, shaping what people pay attention to, talk about and buy. Fan spaces are settling into more established cultural hubs, built around recurring interactions, shared rituals and ongoing conversation
- Communities have also evolved into something more connected and intentional. Platforms are surfacing more fan-based conversations and fan-created content which continues to thrive
- Fans haven't changed in passion, but their collective influence is just becoming more visible, with fan driven moments showing up more prominently in feeds, recommendations and even search results
- Brands are increasingly recognising the power of communities and are starting to embrace fandoms of all shapes and sizes. In the year ahead, the priority will be about spotting where fan energy is accelerating and finding ways to authentically participate, amplify and even co-create with those communities
- As AI generated content fills more of our screens, the real and human content within fandoms only stands out more. Brands will need to move from occasionally tapping in, to genuinely participating.

SOCIAL UNREST

- Consumers are consciously engaging more with social content, shifting from mindless scrolling to richer, engagement-based interactions. Commerce is now deeply embedded, with Instagram Shop, TikTok Shop, and live shopping thriving. Although short-form formats still dominate, long-form content is also on the rise and creators and community-based content and platforms like Discord are booming (see *Creators Unleashed*)
- Platforms such as Discord, Be Real and Threads now offer new ad opportunities and existing platforms like Snap also continue to evolve their ad offerings
- Platforms continue to roll-out and experiment with new features too. This includes ad-free subscriptions, changes in interfaces (Instagram is trialling a primary Reels feed), and further innovation in search formats
- A key area for 2026 is the integration of AI features: assistants such as Meta AI and now Perplexity are partnering with Snap for chat integration. With the rise of AI-generated content, we will see more controls for this put in place, but equally platforms are discussing integrated Gen AI tools or even separate feeds. This could lead to entirely new AI-centric social platforms, exemplified by OpenAI's Sora, where AI-generated video forms its own social experience.



◆ This image is AI generated

MESSY MEDIA

- The 'Messy Media' landscape continues its evolution, becoming even more intricately integrated. In 2026, platforms will continue to blur
- Social media and CTV continue to intertwine. More people are watching social videos on TV sets than ever, with even the likes of Meta and TikTok looking at launching apps for TV. Creators will epitomise this interconnectedness, orchestrating their presence across diverse ecosystems where the lines between social, broadcast, commerce and search have become increasingly blurred (see *Creators Unleashed*)
- Platforms like Spotify are actively expanding video offerings, hosting exclusive programming for traditional broadcasters and investing in the ever popular vodcast format, like many others such as Netflix
- Shoppable formats will continue to expand across multiple media touchpoints, embedding not just commerce but accountability into media experiences. Take G-Commerce for one example (see *Game On*)
- Even our devices are changing. Any screen can now be a games console and with the integration of AI, our media interactions are set to change entirely (see *Interfaces Reimagined*).

ADS WITH THAT?

- Businesses continue to aggressively pursue new monetisation opportunities by introducing advertising or new ad formats
- Ad-supported streaming tiers are rapidly expanding, fuelled by budget-conscious consumers, with Netflix and Disney now reporting 30-35% of users on these plans. Rumours of a potential ad proposition from Apple TV still circulate. Shoppable and interactive ad formats continue to grow across video, but also across other media such as gaming
- This introduction of a tiered ad system isn't just limited to streaming, as Meta introduces an ad free subscription for both Instagram and Facebook in the UK. Then we have new entrants to the advertising world entirely in Discord, BeReal, Duolingo, Hewlett Packard and Mastercard. Expect more brands to monetise either their audiences or data in 2026
- Currently 11% of the population are paying a subscription fee for an AI service such as ChatGPT, Perplexity or Gemini. The dynamics of how to incorporate advertising are currently being worked out in these platforms, but this is an area to watch.



★ This image is AI generated

VIDEO EATS THE WORLD

- Video continues to dominate digital consumption and ad spend. Both the nature of video consumption and its commercial opportunities are expanding, with not only broadcasters innovating, but streamers too, as their ad tier audience and inventory grow
- AI is reshaping the CTV landscape, with personalised ad experiences, data-led targeting and creative opportunities expanding
- The journey of commerce integration continues too with more shoppable and interactive formats, e.g. pause ads shifting to more dynamic solutions
- Vodcasts continue to expand, and CTV is cementing its role as a key offsite channel for Retail Media
- Complexity remains a challenge for the video landscape, making simplification a key focus for consumers and advertisers. Measurement solutions are improving, and each component part of the video plan now plays a clear role. Distribution platforms are further expanding via strategic partnerships, e.g. ITV and Disney, or Amazon and Netflix. Simplification may also happen in other ways, such as the potential merger of ITV and Sky
- 2026 will certainly be a time to double down on video with events like the World Cup dominating the calendar, which in turn will allow broadcasters to leverage a multitude of 'distribution channels'.

SEARCH PARTY

- Search continues to diversify, growing across social and retail media platforms, while LLMs are utterly transforming the traditional search landscape, with AI-assisted discovery now the norm
- Google's AI Overviews pull in over 1.5 billion monthly global users and the use of AI platforms such as ChatGPT and Perplexity is growing rapidly. People are using longer-tail, more personalised and conversational queries as a result
- Google remains the dominant player in search and its generative AI features keep on coming. Multimodal search is becoming more of a reality as Google introduces 'Search Live' and we see voice and image-based searches increase (see *Interfaces Reimagined*)
- Google's AI Mode now tackles more detailed queries, and Gemini is coming to Chrome more widely in 2026. Watch out for these types of agentic browsers and the addition of agentic features, which will shift people's search and commerce behaviours entirely (see both *Invisible Shoppers* and *Interfaces Reimagined*)
- As search becomes more 'zero click' and the web moves towards more machine-to-machine interactions, the radical evolution of the search landscape continues to be pivotal to the future of marketing as we know it.



◆ This image is AI generated

RETAIL MEDIA

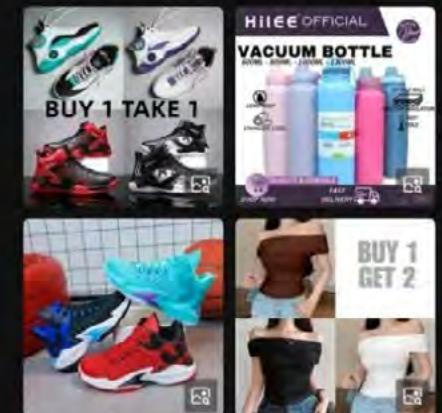
- Retail Media offerings continue to mature. New, broader players are still entering the market, such as Duolingo, HP and Mastercard, monetising either their audiences or data. Pub brand Stonegate and Cotswold Outdoor are monetising their sites too
- In-store digitisation continues across the board. Retail media continues to deeply embed itself beyond off-site, across CTV, DOOH, and social channels, with the new Amazon-Netflix partnership a landmark moment. We even now see gaming platforms (see *Game On*) and news publishers partnering with retailers (e.g. News UK and Future with Ocado)
- Retail media is truly transforming into 'brand' media, with all the benefits of performance media – hyper-targeted campaigns and sophisticated measurement that proves full-funnel ROI for not just endemic brands
- Standardisation and fragmentation of the landscape will be the big focus for 2026. The impact of Gen AI should also be watched closely. With a large percentage of ad spend still tied to on-site search, retail media is set to be hugely impacted as agentic commerce re-writes the digital path to purchase. Expect more retailers to make strategic moves, as Walmart and Amazon have done (see *Invisible Shoppers*).

SHOPPABLE MEDIA

- TikTok Shop continues to capture a big chunk of social commerce, now attracting large retailers. The right creators have been a driver of success here (see *Creators Unleashed*), capturing the balance between commerce and entertainment
- Live shopping is finally gaining traction outside of China, with even Twitch introducing livestream shopping ads
- Shoppable formats within CTV are starting to expand now too. Interactive pause ads are proving a popular platform for shoppable activations, with Amazon introducing clickable carousels and ad-to-cart functionality. ITV has also added dynamic elements to its advertising offering. YouTube is introducing an enhanced shoppable CTV offering with a new interactive product feed. Remote activated CTV commerce solutions will likely be tested further in 2026
- G-Commerce is also a space to watch, as highlighted in *Game On*. Direct-to-retailer cart integrations and "phygital" products (physical merchandise sold within a virtual world) are transforming gaming into a direct sales channel
- Even ChatGPT now has an integrated shopping experience via 'Instant Checkout' complete with buy buttons, marking a clear step towards fully agentic commerce solutions (see *Invisible Shoppers* for more).

Find similar products with image search

Take or upload a photo to find similar products on TikTok Shop.





EXPERIENCE
INNOVATION

03

INVISIBLE SHOPPERS

AI agents are the stealth shoppers, set to reshape marketing as we know it



Building on last year's Enter The Assistant trend, AI is now shifting from mere assistance to autonomous action with the emergence of agents. Now we find shopping directly in the firing line. Welcome to 'agentic commerce', where AI no longer just makes recommendations or answers queries, but independently navigates the complexities of purchasing, from product discovery to instant checkout.

The traditional purchase funnel – awareness, consideration, conversion – could collapse into a single, agent-driven step. Discovery becomes proactive as agents identify products based on user needs and context. Consideration happens invisibly as agents compare features, scan reviews, check prices, and even negotiate offers. Conversion becomes automated, with payment processed in the background. Post-purchase agents could handle returns or reorders.

We are observing the initial steps of agentic commerce with platforms introducing 'Instant Checkout' and 'Agentic Checkout' features, powered by new AI-driven protocols and payment initiatives. In the year ahead, the promise of true agentic commerce will transition from concept to imminent reality. We anticipate the proliferation of agentic browsers and the rise of machine-to-machine communication via APIs. Alongside this, we must monitor the tension between rapidly advancing AI capabilities and consumer readiness to fully delegate buying decisions. This marks a future where unseen AI agents become integral to transactions, redefining consumer journeys and forcing brands to adapt to a world where their primary customer might increasingly be an AI, not a human.

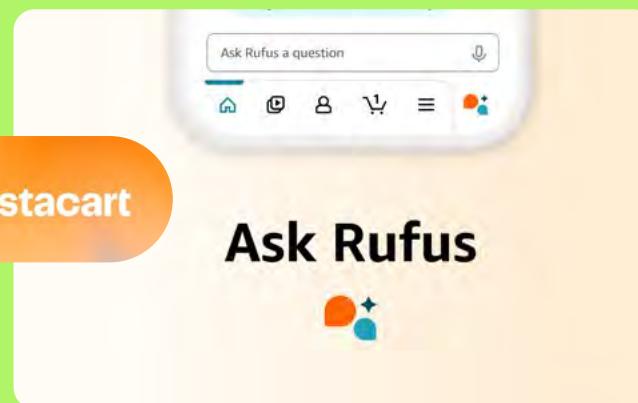


AREA TO WATCH 1

The Path to Agents: From Recommendation to Transaction

AI is already significantly influencing the purchase journey, primarily for discovery and consideration. We found that 71% of users of services like ChatGPT and Gemini already use them for products and service research or foresee doing so (up from 66% last year). Extend this to those who research products in AI Overviews or AI Mode in Google and the impact of AI on commerce is already undeniable.

This is just the beginning. In our last Trends report, we talked about the emergence of advanced AI shopping assistants, like Amazon's Rufus, which are growing in popularity. Rufus now has over 250 million users. Zalando, Instacart, Carrefour, eBay, and Walmart have also launched AI-powered assistants and ChatGPT's new Shopping Research does similar things. We expect to see ad trials within these types of assistants.



However, we also see the journey towards fully agentic commerce accelerating, with AI systems acting on behalf of consumers for the entire research and buying process. A halfway step is 'Instant Checkout' from Open AI, partnering with brands like Etsy, Shopify and Walmart, to allow users to buy single items directly within ChatGPT, without being redirected to the merchant site. This is arguably no different to the integrated frictionless commerce social platforms have been working towards for years. But it's the integrated payment, partnerships and protocols put in place to facilitate this that are interesting. OpenAI's Agentic Commerce Protocol (ACP) powers Instant Checkout, ensuring orders and payments integrate with existing merchant systems, with OpenAI receiving a small fee per completed order. It's a big monetisation opportunity for Open AI, effectively turning it into a commerce engine. Brands will need to be mindful if partnering with ChatGPT and other AI platforms in this way. It's another way to make them discoverable, but it may give away the opportunity of valuable first party data from the transaction in the process.

Beyond this, we observe full-funnel agentic commerce offerings, shifting AI from an enhanced search tool to a proactive agent that can execute tasks. Amazon is trialling a 'Buy for Me' feature and Google is expanding its AI Mode with 'agentic checkout,' powered by its 50-billion-product Shopping Graph. Agentic checkout allows users to track prices and delegate AI to purchase an item on a merchant's site via Google Pay once a specified price is met.

Agentic browsers, such as Gemini in Chrome, OpenAI's Atlas, and Perplexity's Comet, are another significant development, enabling agents to complete tasks and shop directly within your browser (see *Interfaces Reimagined*). Agent-to-agent communications are a natural progression too, where agents shop on behalf of customers, dealing directly with retailers' own agents. Why would an AI agent navigate through FAQ pages on a website for returns when they could contact a returns agent directly? Offers could even be negotiated between agents.

But where are consumers on this journey? Currently, the technology is demonstrably ahead of the consumer need. Consumers will not suddenly adopt fully agentic offerings overnight. Many consumers appreciate AI handling research and sourcing, particularly for high-value items, yet most still desire oversight of the actual purchase. A notable 58% agree they 'like AI agents finding deals for me but prefer to purchase myself', indicating a reluctance to fully cede control. In the near term, hybrid behaviour is anticipated. AI agents manage the preparatory work (comparing prices, reviews, terms), with humans approving final purchases. As confidence builds, greater delegation of transactions is expected.

"I would never trust AI to completely to purchase something for me. I'd always need to give the final judgement, especially for a bigger purchase like a holiday or a flight or something."

Male, 18-24, South West, Early Tech Adopter

"AI assisting you making that decision, yes. Making the decision for you, no. That's where I draw the line."

Male, 35-44, East of England, Early Tech Adopter

Thinking about different categories, when it comes to both sourcing and purchasing, what would you be happy for AI to do on your behalf?

Row %	Just sourcing	Just purchasing	Sourcing & purchasing	Neither
Cars	32%	7%	12%	49%
Insurance	34%	9%	15%	42%
Groceries	30%	11%	17%	43%
Flights	32%	9%	16%	43%
Holidays	35%	9%	16%	39%
Food & beverages	30%	11%	17%	43%
Beauty / grooming products	30%	9%	16%	45%
Toys	27%	8%	15%	49%
Hobbies (products to do with)	31%	10%	15%	44%
Train tickets	30%	11%	18%	41%
Kitchen appliances	33%	9%	16%	42%
Clothing	33%	10%	16%	41%
Toiletries	29%	11%	18%	43%
Home furnishing / decor	34%	9%	13%	44%
Cleaning products	30%	12%	18%	41%
A takeaway	27%	11%	16%	46%

Base: All respondents (n=3190)

AREA TO WATCH 2

Gearing Up for Agentic Commerce: Protocols, Payments, and Preparation

With agentic commerce, agents will be interacting directly with the web rather than with humans. Most websites and businesses aren't set up with this in mind. New infrastructure is needed, with open standards at the core designed to facilitate communication, context sharing, and transactions between AI agents and businesses. These are starting to emerge in broader interoperability standards, like Anthropic's Model Context Protocol (MCP) and Agent-to-Agent Protocol (A2A), which fundamentally enable agents to be intelligent, remember context and collaborate. Then, built either on top of, or in parallel to these, are more transactional standards such as OpenAI's Agentic Commerce Protocol (ACP), and Google's Agent Payments Protocol (AP2).

AP2 is backed by more than 60 merchants and major financial players like PayPal, Mastercard and American Express. Payment providers are gearing up in other ways too. PayPal is aggressively positioning itself as a payment's mainstay, integrating its wallet and services across OpenAI, Google, and Perplexity. Mastercard is developing its Agent Pay solution and Visa's Intelligent Commerce program also offers 'AI-ready cards'. These standards and payment innovations will transform agentic commerce from simply a concept into an imminent reality.

However, it's not merely the technical infrastructure facilitating these new transaction types that brands should consider. If a large percentage of a brand's customers become AI agents rather than humans, the wider effect on marketing will be monumental. It becomes not a just simple task of optimising websites and content – it's a complete rewiring of media and creative strategy.

AI agents operate on logic, efficiency, and structured data. They require product information, performance signals (like return rates), real-time inventory, pricing, and offers, all presented in machine-readable formats via APIs and standardised markup. This differs significantly from traditional SEO. Why would an agent navigate website content when it can communicate more directly? Take Google's Shopping Graph, which powers AI Mode. It has billions of product listings updated hourly, pulling in product names, descriptions, prices, images, availability and reviews. The aim is for this not to be limited to Google, but to serve as an index for the entire commercial web. Ensuring your brand is well represented here becomes a critical aspect of Agentic Commerce Optimization (ACO).

While agents figure out how to get something efficiently, humans decide why they want something in the first place, driven by brand, emotion, and values. Our How Humans Decide research with Oxford University shows that 84% of purchases involve people choosing brands they are already biased towards. Brand marketing will be more crucial than ever. To thrive, brands will need dual-audience strategies: factual clarity for AI, and emotional connection for humans. A product page, for example, must deliver its full dataset for agents while still carrying compelling imagery and brand cues to generate human desire. It's easy to foresee price or offer-led advertising increasingly targeted at agents rather than people.

If agents conduct much of the browsing, this could have profound implications for the web as we know it. With the web being designed for more machine-to-machine communication, who or what will be clicking through to sites? How many real people will be seeing ads? Goodbye, clicks, conversion rates, and page ranks. A whole new world awaits marketers.



◆ This image is AI generated

AREA TO WATCH 3

Reality Check: Consumer Adoption Won't Happen Overnight

While people are happy using AI for sourcing and validating purchases, they aren't yet a primary discovery tool and agents completing the actual transaction remains a step too far. This reluctance largely boils down to the uncertainty people feel around AI. Ogilvy's behavioural economics department refers to the Ostrich Effect, where the overwhelming and unpredictable nature of the tech leads many to dismiss using it, effectively burying their head in the sand.

People naturally focus on what could go wrong. They don't trust that an agent will have enough understanding of their specific circumstances to make the right decision. "What about my loyalty points, my top cashback?". 42% agreed that 'I think I could find a better deal than an AI agent shopping on my behalf'.

Agentic transactions process extensive user data, gaining deep insights into online habits that could include loyalty history, bank details and potentially even the contents of people's emails and calendars. People are reluctant to grant agents full access to the personal and financial information needed for optimal experiences. 67% say they are "concerned about the security of their data when using AI agents". To justify this data sharing, agent benefits must be overwhelming – saving significant time, stress, or money – which they currently aren't. Is an agentic browser doing a grocery shop really a game changer, considering the level of data access needed in exchange? Agents aren't yet tackling the most difficult decisions for people, where they could add the most value.



Trust also falters due to concerns about agent impartiality, bias, undisclosed advertising, and partnerships influencing recommendations. Consumers pose the critical question the industry is also grappling with – who controls what sites these agents search?. There could be new walled gardens. The battle for control is already intensifying. Shopify is blocking certain agents, and Amazon is preventing competitors like Google, OpenAI and Perplexity from tapping into its marketplace. A fragmented and clunky agent landscape could be its own worst enemy, effectively limiting the usefulness of agents altogether.

In addition, we are underestimating people's emotional attachment to shopping. A significant 57% believe AI agents will 'take the fun out of shopping.' The joy and excitable anticipation of a purchase is often in the discovery and research stage and in the control that comes with choosing. Some 65% "enjoy the process of searching websites and finding the best deals myself" – with this sometimes feeling like a gamified hobby. One mum even described this as her superpower – the thing she did best for her family. To succeed more widely, agents will need to ensure that shopping still retains these feelings of enjoyment.

In summary, fully agentic commerce demands substantial behavioural and attitudinal shifts from consumers. It won't go mainstream overnight. However, familiar platforms could provide the entry point. Agentic features embedded within trusted commerce platforms like Amazon and Google offer a viable route, much like AI Overviews quickly gained traction despite initial AI concerns. In the coming year, people will grow more comfortable using AI tools for discovery and research, tentatively trialling agent solutions. How quickly this progresses will depend on levels of consumer trust and how platforms evolve their offerings.

- 67% of respondents are concerned about the security of their data when using AI agents
- 67% are concerned about who/what influences AI agents if it shopping on my behalf
- 65% enjoy the process of searching websites and finding the best deals myself
- 61% believe an agent won't know enough about what I need, to make the best purchase decisions
- 57% believe AI agents will take the fun out of shopping
- 54% like the idea of AI agents finding the best deal for me but I'd rather purchase the product myself
- 42% think they could find a better deal than an AI agent shopping on my behalf
- 36% believe AI agents will eventually replace the need for me to visit most websites directly
- 34% believe AI agents will make their life significantly easier
- 31% believe there are certain purchases they would gladly hand over to an AI agent
- 28% believe in the future, it's likely that they will trust AI agents to make purchases for them

% agree, all adults

I am concerned about the security of my data when using AI agents	67%
I would be concerned about who/what influences AI agents if it shopping on my behalf	67%
I enjoy the process of searching websites and finding the best deals myself	65%
An agent won't know enough about what I need, to make the best purchase decisions	61%
AI agents will take the fun out of shopping	57%
I like the idea of AI agents finding the best deal for me but I'd rather purchase the product myself	54%
I think I could find a better deal than an AI agent shopping on my behalf	42%
AI agents will eventually replace the need for me to visit most websites directly	36%
AI agents will make my life significantly easier	34%
There area certain purchases I would gladly hand over to an AI agent	31%
In the future, it's likely that I will trust AI agents to make purchases for me	28%

Base: All respondents (n=1597)

BRAND CONSIDERATIONS

IMPLEMENT A DUAL-AUDIENCE MARKETING STRATEGY:

Target both the human and the machine. Craft content and campaigns that provide factual clarity and efficiency for AI agents, while simultaneously building emotional connection and brand affinity with human consumers.

PRIORITIZE AGENTIC COMMERCE OPTIMISATION (ACO):

Develop and maintain machine-readable product feeds, APIs, and structured data, including real-time inventory, pricing, and performance signals, to ensure AI agents can effectively discover and recommend your products. Optimising for Google's Shopping Graph is a great example.

FOCUS ON THE EMOTIONAL "WHY" OF PURCHASE:

Differentiate your brand by emphasising values, emotional benefits, and unique attributes that resonate with human desires, providing reasons to choose your product beyond price or efficiency.

CONTINUOUSLY MONITOR CONSUMER SENTIMENT & BEHAVIOUR:

Actively track evolving consumer comfort, trust levels, and preferences regarding AI agent interactions, with particular attention to how they are using it on trusted platforms.

UPSKILL TEAMS FOR THE AGENTIC ERA:

Invest in continuous training for marketing, product, and technology teams to deeply understand AI agent logic, new protocols, structured data, and the evolving implications for content, campaign orchestration, and attribution.

04

INTERFACES
REIMAGINED

AI is re-writing the very fabric of how we interact with technology



We stand at the precipice of a profound revolution in how we interact with technology. Driven by rapid advancements in artificial intelligence, the very fabric of human-computer interaction is being fundamentally rewritten. It's a complete reimaging of how we digitally engage, transitioning towards more intuitive, conversational, and context-aware experiences that seamlessly integrate into our daily lives and physical environments.

AI is quietly transforming how we interact with our most familiar devices and platforms – our phones, PCs, TVs, browsers, and apps. These devices can now understand context, anticipate needs, and respond in ways that feel increasingly natural and human-like. We are moving beyond just text-based interactions, entering a world rich with multi-modal experiences. Large Language Models (LLMs) are not only improving existing voice and visual search functionalities; their broader application is also naturally driving adoption of these technologies. After years of discussion, we are finally seeing a tangible uptake. This momentum will serve as the catalyst for truly multimodal interactions where physical and digital realities converge, a shift that is even enabling entirely new categories of devices.

The implications for marketing are immense, forcing a fundamental rethinking of discovery, engagement, and the very nature of the customer journey. As interfaces are redefined, so too are the possibilities for marketers.



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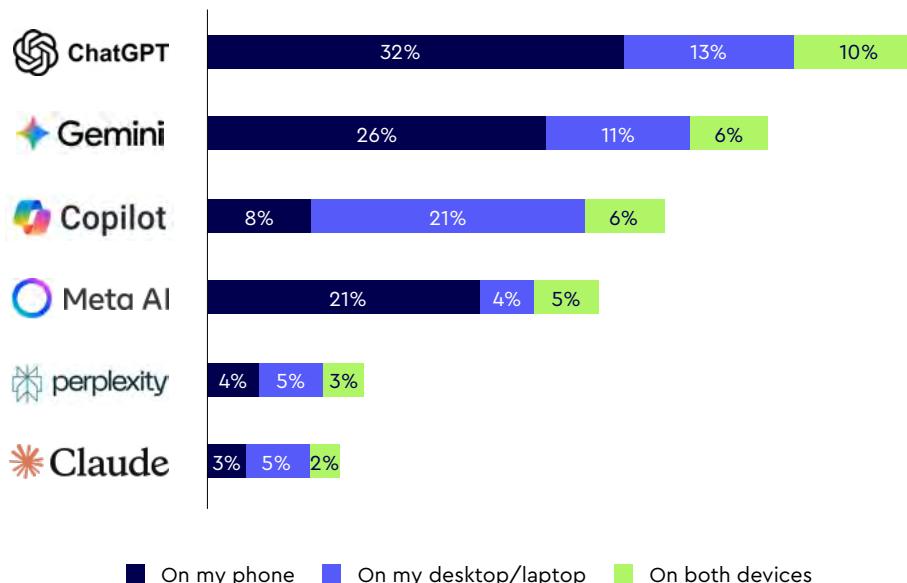
AREA TO WATCH 1

Familiar Tech Succumbs to the AI Revolution

The tech experiences and devices we've grown accustomed to are on the verge of profound transformation, as artificial intelligence is deeply woven into their very fabric. This isn't merely an upgrade; it's a fundamental disruption of the digital habits and interfaces we know and love. Building on our Enter the Assistant trend from last year, integrated AI capabilities like Gemini and Apple Intelligence continue to gradually transform phone and PC experiences, with new features continually being rolled out. Apple, for instance, is finally poised to overhaul Siri, with its capabilities significantly enhanced by Google's Gemini.

Beyond phones and PCs, AI's integration into other devices warrants continued close attention. Having grown accustomed to using AI-based services like ChatGPT and Microsoft Copilot on their phones and PCs, consumers largely perceive this expansion as a natural evolution.

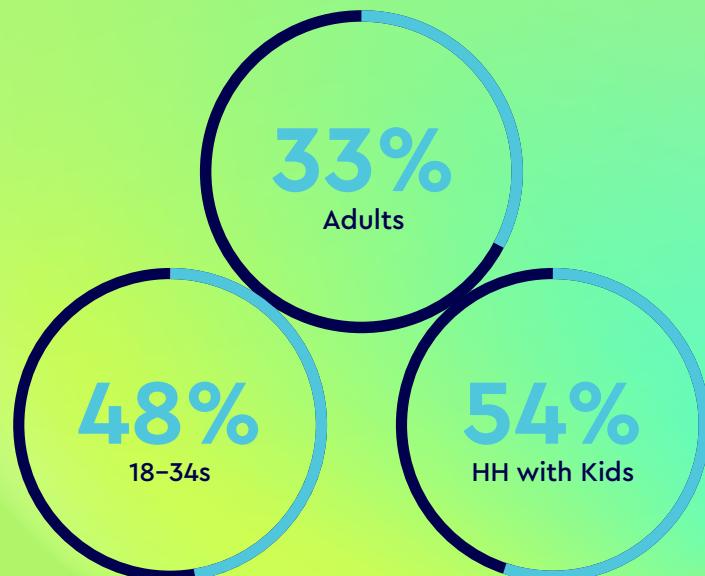
Have you used any of these services, and if yes on what device?



Base: All respondents (n=1597)

Gemini is expanding into watches and cars, with Android Auto integration forthcoming. TVs represent another significant frontier; Gemini is soon to arrive here too, alongside Samsung Vision, an integrated assistant powered by Bixby, Perplexity, and Copilot. These features promise more than just show recommendations, offering the ability to answer questions about on-screen content for example. It's clear that integrated AI functionality could transform media experiences entirely. Copilot is also coming to Xbox, poised to act as a gaming companion by providing information, personalising play, and fostering community connections. As generative AI proliferates across all devices, voice is set to become the more natural interface.

% agree "I want a voice assistant built into my car".



App experiences are also transforming, from two perspectives. AI continues to integrate into existing applications. Social platforms, for example, already feature tools like Meta AI, while Perplexity has partnered with Snap for chat integration. Simultaneously, apps are migrating to AI models. ChatGPT is becoming a "super app" platform via its Apps SDK, allowing partners like Booking.com, Expedia, Canva and Spotify to meet users directly in chat. However, companies will need strong incentives to do this however, to offset the potential reduction in direct app usage.

Lastly, the web browser has become a prime battleground for AI integration, with AI sidebars and agentic capabilities redefining this once-settled landscape. Enter the 'browser wars.' Key entrants include: OpenAI's Atlas, featuring an AI sidebar and 'Agent Mode' for purchases; Microsoft's Copilot-enabled Edge; Google's Gemini-powered Chrome; and Perplexity's AI-first Comet browser. These agentic browsers which are able to view what the consumer sees on screen, will inevitably raise consumer concerns about data and privacy. However, the benefits might outweigh the concerns, as these browsers streamline workflows, anticipate needs, and take on complex tasks, from booking travel to managing information across multiple sites.

The agentic dimension of this shift brings a fundamental change: AI agents will be making decisions on our behalf. To enable this, the web will gain a new layer of machine-to-machine communication, where APIs and structured data reign supreme. Instead of navigating a restaurant's website, the agent will simply use a booking API (as highlighted in Invisible Shoppers). Transactions could become entirely agent-to-agent. Personal agents could act as comprehensive concierges, fulfilling diverse services from a single interface. Users will no longer have to navigate separate apps or sites which unbundles traditional, siloed business offerings, compelling companies to innovate. But crucially, whichever tech company or platform owns the agent (the ultimate decision maker), also owns the transaction.



AREA TO WATCH 2

A multimodal revolution

The next frontier in interfaces involves the seamless integration of multiple inputs and outputs, merging screens, voice, and even our physical environment. This evolution is largely driven by increasingly multimodal AI models, such as Gemini, which interpret and respond across various data forms simultaneously. It ushers in a new era where tech interactions are no longer confined to a single sense but reflect the richness of human perception. Google's Project Astra, initially born out of DeepMind, has been focused on this area for the last few years. The fruits of this are now live, powering an array of new experiences in search, the Gemini app and products from third party developers. Perhaps the most compelling feature is 'Search Live' which enables users to speak with search while sharing their camera feed. AI views what people are looking at, providing real-time, context-aware answers, with potential extensions into agentic commerce features.

While fully multimodal interactions won't be adopted overnight, strong behavioural shifts are already evident. Visual search, for example, is growing across all platforms, from Pinterest to Google. Lens now has more than 25 billion monthly queries globally, and features like 'circle to search' are gaining popularity. Voice technology, too, seems to have reached a milestone.

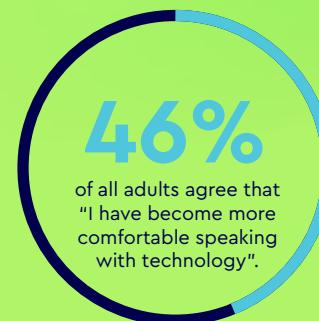
Voice interactions have been discussed for almost a decade, but only now is the technology truly meeting consumer expectations. As Large Language Models (LLMs) drive significant improvements in the technology, voice offers a faster, more convenient, and intuitive interface. Historically, voice struggled with context and emotion, but companies like ElevenLabs are pushing boundaries, aiming for voice agents to pass the Turing test for conversational AI in the coming year.

Our latest research highlights a significant increase in comfort with voice-based tech interactions. People are engaging more richly with LLMs, and we see conversational searches becoming more prevalent. Google reports that 15% of daily searches are new, and complex queries (five words or more) are growing three times faster than simple ones (Q4 2024). These types of interactions are naturally gravitating towards voice as a preferred mode of engagement.

"So, I have recently started using the voice element of ChatGPT and it worked really well. It felt a bit bizarre because it genuinely did feel like I was just talking to a person".

25-34, Female, Yorkshire, Mainstream tech adopter

People are realising it's simply easier to speak with technology and increasingly expecting to interact in this way. For example, phone-based voice assistant use has risen to 58%, up from 49% last year, primarily driven by 18-34 year-olds, where it reaches 78%.



AREA TO WATCH 3

AI Integration Fuels New Spatially Aware Devices

A key component of multimodal interactions is AI's ability to translate data from embedded sensors, cameras, and microphones into meaningful, context-aware experiences. AI can now perceive, interpret and interact with the physical world in real time. Effectively, it is now the brain for spatial computing. So far, hype around the 'metaverse' has overshadowed the more specific proposition of spatial computing. Unsurprisingly, 75% of consumers have heard of the metaverse, but only 35% have heard of spatial computing. We are likely to see this shift in the next few years, as AI powers spatial computing forward.

In our Immerse Me trend last year, we highlighted a diverse array of new glasses and headsets coming to market. In 2026, the momentum continues, but now with a more natural emphasis on smart glasses and a focus on the embedded AI that will take experiences on these devices to the next level. Meta's Ray-Ban smart glasses have already shown promising sales, leading to an upcoming 'Meta Ray-Ban Display' model with a full-colour screen and gesture-interpreting wristband. EssilorLuxottica, who produce smart glasses for Meta, are now aiming to increase their annual production capacity to 10 million units by the end of 2026.



Meta isn't alone in placing big bets on smart glasses. Amazon has developed AI glasses for its delivery drivers, and Apple is reportedly shifting focus to smart glasses, deprioritising a major overhaul of its Vision Pro headset. Imagine the possibilities for out-of-home (OOH) advertising should smart glasses become mainstream. Gemini-integrated glasses are coming soon too, but Google's initial focus has been around embedding Gemini into the Android XR operating platform, which now powers Samsung's newly launched Galaxy XR headset. This integration allows users to access information about their surroundings using combined hand and voice commands. Imagine planning a holiday, immersed in videos, maps, and local tips, and then instantly creating an itinerary in minutes. It is important to note that these devices are designed to be complementary to smartphone and smartwatch interactions, rather than replace them.

Beyond glasses and headsets, OpenAI has partnered with former Apple designer Jony Ive, to develop an entirely new, screenless, pocket-sized device. While details are scarce, it will embed cameras and microphones with OpenAI's latest model for contextual awareness and interaction. Again, it aims not to replace other devices but enhance experiences by communicating with them. OpenAI's involvement could give it strong potential to succeed where similar propositions have faltered. Watch this space.

AI won't merely exist in our devices; it will become an integral part of the space around us, fundamentally redefining how we experience and interact with information. As one consumer puts it: "I feel like everything's becoming more built-in, like having headphones that translate languages and augmented and virtual reality for example. I think these things will become far more prominent, so you will get a way more personalised, tailored experience that can exist everywhere."

As this new era unfolds, the vast amount of real-world data collected by pervasive devices – from visual and auditory inputs to biometric signals – makes privacy, data ownership, and ethical considerations paramount. These concerns could also pose a significant barrier to adoption, with 63% agreeing they "want to opt out of AI on their devices". Transparency, clear data governance, and intuitive controls for opting out or managing AI functionalities are non-negotiable. Those that are excited for these new types of interactions want to do it on their own terms.

BRAND CONSIDERATIONS

OPTIMISE FOR AI DISCOVERY:

With integrated AI solutions and browsers as primary discovery points, content needs to be consciously designed for both AI and human interactions. Audit and optimise for AI discovery on both classic search interfaces as well as new, multi-modal, AI-powered ones.

CEMENT YOUR 'CONVERSATIONAL' STRATEGY:

- As voice becomes more widely used and AI interactions grow more conversational, brands must develop natural language strategies that set themselves up for this new world. Develop a clear brand tone of voice for example and clear roadmaps for launching and leveraging conversational assistants.

EMBRACE MULTIMODAL ASSETS AND SPATIAL CONTENT RIGHT NOW:

The shift to multimodal AI is happening now. Brands must immediately integrate dynamic visuals, engaging audio, and interactive elements into their creative. Start crafting and collating 3D assets.

PILOT EXPERIENCES FOR NEW DEVICES AND AD FORMATS WITHIN NEW PLATFORMS:

Experiment and learn the lessons early. When it goes mainstream, you'll be ahead.

PRIORITISE TRUST, PRIVACY AND DATA ETHICS:

As AI interfaces process vast personal data, brands must champion consumer trust by ensuring transparent data practices, ethical AI deployment, and clear consent processes, underpinned by regular audits.

How are our other 'Experience Innovation' Trends Doing?

HOME SWEET HOME

- Progress in smart home tech is now less about hardware and more about AI integration (see *Interfaces Reimagined*). Generative AI will transform TVs into truly smart viewing companions, with Copilot rolling out to Samsung and LG TVs, and Gemini integration also imminent. This functionality could compile tailored show recaps or answer questions during shows
- AI integration will extend to other smart home devices beyond TVs, making them both more predictive and interconnected
- Smart speakers and displays are all set to transform into AI hubs and ecosystems. Google is injecting its Home and Nest devices with Gemini – more as a platform update which will extend to existing devices too. Amazon is also expanding its LLM subscription offering Alexa+ by launching more dedicated devices and an Alexa+ Store. This is set to offer a vast ecosystem of services and integrations, all with brand opportunities
- Voice will play much bigger role in the smart home ecosystem, as people get used to more conversational interactions (see *Interfaces Reimagined*).

LOOK WHO'S TALKING

- Beyond the thriving formats of podcasts and other speech-based audio, our research shows consumers are not just listening to more speech-based formats but are becoming more comfortable interacting with tech in conversational ways too. Voice notes are on the rise, along with voice-based search queries, as richer interactions with LLMs gravitate towards voice as a more natural mode of engagement
- People are realising it's simply easier to speak with technology and are increasingly expecting this
- The use of voice assistants is finally on the rise too. More people are engaging with their smart speakers and phone-based voice assistants, and we anticipate the use of these for a wider range of activities in the year ahead
- Significant tech advancements are also coming. Apple is finally overhauling Siri with Google's Gemini, and the Alexa+ platform is expanding its dedicated devices and ecosystem
- Longer term, as generative AI embeds more prolifically across everything from TVs to cars, voice will solidify its role as the most natural interface, becoming a truly ubiquitous presence spanning smart homes, vehicles, streaming, and search (see *Interfaces Reimagined*).



IMMERSE ME

- The possibilities continue to grow for media involving immersive technologies, offering real impact for brands as consumers become ever more receptive to this type of advertising
- The digitisation of OOH screens and real estate continues at pace, offering more immersive formats and more opportunity to scale campaigns. For example, digital tunnel wraps are coming on the Elizabeth line and a multisensory 'travelator' experience is coming to Waterloo station, complete with 3D enabled screens, sound, scent and motion. Multisensory brand experiences continue to be a draw for consumers
- AI is adding another layer to immersive experiences, introducing more personalisation and context. 3D activations for example can now not only be interactive but also dynamic
- Integrated AI is now seamlessly blending digital and physical realities and spatial computing is becoming more of a reality (see *Interfaces Reimagined*).

REAL OR REPLICA?

- Generative AI Tools are increasingly influencing the content we see online and have improved to such an extent that production quality results can now be achieved by consumers and professionals alike. This is especially true for image and video formats – take Nano Banana, Veo 3 and Sora
- But even automated writing tools are shaping an ever-larger share of what we read online. We now have a paradox: democratised information and creativity versus the risk of internet-wide 'AI slop' and 'deepfake' content
- Social media platforms will be a big area to watch 2026, as they discuss integrating AI creation tools and featuring separate feeds for AI-generated content. Virtual influencers are also emerging. In contrast, we are also seeing social platforms introduce tools for people to opt out of or alter the amount of AI content they see (in *Creators Unleashed*)
- Already 65% of the UK population say they are 'finding it hard to tell what is real or what is synthetic content'. Expect to see increased efforts to identify and label AI-generated content online, especially with the EU AI Act's August 2026 deadline, requiring clear, often machine-readable, watermarking or metadata for synthetic content.



◆ This image is AI generated



OPERATIONAL INNOVATION

05

MARKETING SUPERPOWERED

Advances in data and AI are combining with human smarts to create bionic new marketing superpowers

This image is AI generated



Every superhero has their origin story – that pivotal moment where new powers are bestowed. Ours is happening right now, as we combine human smarts with new data and AI capabilities.

We have an explosion of new data sources, but it's AI that brings a whole different level of computational power to crunch volumes of data that the human mind can't process alone. Technology is enabling the kind of collaboration that would in the past have required not just the sharing of sensitive data but also hours of manual work.

The concept of making data-led decisions in media once meant cookies and digital retargeting. But now it's a whole new ballgame. Data-led decisions happen at every stage of the marketing process. Our new superpowers can be used to inform business strategies, customer insights, audience targeting, content creation, distribution and activation. Even the measurement of media investment against business outcomes becomes quicker and more precise. But none of this works without the right people to initiate and orchestrate it. The combination is the superpower.



AREA TO WATCH 1

From 'Big Data' to 'Data Superpowered'

Technology is finally fulfilling the promise of big data. Data signals continue to expand across more places than ever before, but we now have the means to learn from, unpack, connect and activate on them too.

Secure data collaboration platforms such as InfoSum remove the operational barriers and commercial risks for any business sharing data with another. The computational power of AI extracts knowledge from these mixed datasets at lightning speed to produce a bespoke knowledge base, which can be used across a broad range of marketing tasks.

The superpowers afforded by such slick, safe data capabilities aren't only for digital players. Legacy media owners benefit too. Brands such as Channel 4 and ITV have partnered with retail media brands for a while, offering a more closed-loop approach for on-demand TV. Now, these types of retail media partnerships are expanding across gaming platforms (see *Game On*) and news publishers like News UK and Future with Ocado. Netflix has even teamed up with Amazon to bring a layer of commerce data to its media buy. Using data collaboration platforms like InfoSum, advertisers can share first-party data on high-value customers with media partners to inform targeting and find new customers with similar high-value attributes. Measurement can take the reverse approach, with media partners making delivery data available via data collaboration platforms, so brands can see which of those exposed to their advertising went on to purchase.



In the past, data targeting relied on cookies and IDs and was limited to digital. Now, AI brings together multiple datasets without that ID reliance, leveraging them in unprecedented ways. The resurgence of geo-location data is an example. AI is being used to unify vast amounts of location data to build a targeting approach more nuanced than any human planner would be able to create alone. Retailers now use AI to analyse local foot traffic, weather patterns and competitor activity, dynamically serving localised mobile ads for specific and timely offers to consumers within a precise radius of a store.

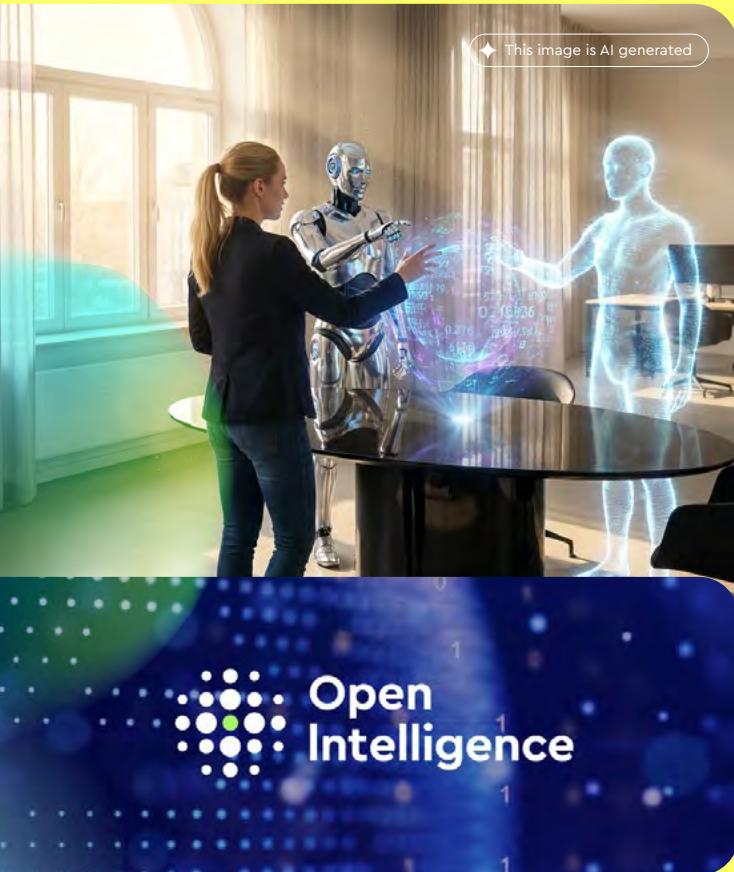
As media providers find new ways to monetise their wealth of data, the potential for brands to collaborate with them on bespoke approaches will only expand in 2026.

As brands build their data capabilities and benefit from more AI tools at their disposal, the rise of standalone data solutions is shaping the media landscape. In the past, accessing specialist data meant running media buys through the partner in question. Now, the data itself has become a product, purchased separately to inform the planning, buying or measurement of media. Blis' Audience Planner is a notable example.

Alongside these developments, more specialist data partners will emerge. Some are longstanding, others are new to the media space. They allow brands to leverage data from sectors as diverse as finance, retail, automotive, the public sector and more. There will be more data signals than ever to power media. Mastercard, Starcount and Experian have innovated to offer valuable insight into purchase behaviours, while companies like DataOrbis have pivoted from working with FMCGs on field sales to providing curated datasets for marketing. Outra and TwentyCi provide detailed data on UK households and the property market. Opta and Sportmonks offer real-time insight into live sports matches and betting odds. This is just a selection of the partners coming to the table throughout 2026, and media planning is soaking all this up like gamma rays.

AREA TO WATCH 2

A Superpowered Full-funnel Revolution



One area we'll see the industry focus on more is the application of our newly acquired marketing superpowers all the way through the entire marketing process.

So, let's talk about the funnel. For all that we've accepted the non-linear nature of consumer behaviour, our mental model of the marketing funnel still holds strong. We build campaigns and entire strategies around the notion that we drive awareness at the top of the funnel and action at the bottom. But we know that this is becoming less clear-cut. All stages of the purchase cycle are transforming, and we need to use our new superpowers to transform with them.

The industry currently focuses much attention on using data and AI to improve optimisation and performance metrics at the bottom of the funnel. This heroes ID level data and is an area of diminishing returns. Consider that 84% of purchases involve people choosing brands they are already biased towards, leaving only 16% of sales open to influence through lower funnel marketing (WPP – *How Humans Decide* research) and that agents could be doing much of the legwork and purchasing on our behalf in the future (see *Invisible Shoppers*). Not investing enough in building differentiation for brand now, could create serious cost in the near future.

Before we even think about working at the top of the 'purchase funnel', it pays to think about those big brand growth challenges. AI, combined with the right data and brilliant human minds, can help us identify these growth challenges and how to solve them. It's about aggregating all our knowledge, uncovering patterns and opportunities in data that might otherwise have been buried, to provide shortcuts to growth that humans alone can't see. Everything marketing-related then stems from here. For us as an agency, this could be about joining the dots by using a combination of WPP, media partner and client first-party or business data to identify those opportunities. Who is not buying the product? Where are the gaps? Business impact first. Media strategy and audiences next.

When working at this earlier insight-driven stage, we will see businesses increasingly include the use of synthetic data. These are AI representations of target audiences trained on real data and audience insights. It's not there to replace human research but to enhance it. It allows for rich insights on demand and could, for example, help to create hypotheses that can then be tested with real people.

The middle of the funnel is also where data-driven approaches will start to unlock new opportunity, whether improving consideration, triggering people into market, or creating preference. Brands, agencies and platforms will now take the wealth of knowledge and data-driven skillsets built up over the years in performance and programmatic media and apply them to more newly addressable channels such as digital out-of-home, digital audio, connected TV, gaming and more. AI won't just enable consistent approaches to addressing audiences across all these channels, it will also lower the barrier to advanced analytics. Middle-funnel activity will be more measurable than ever as brands adopt AI-powered attribution modelling and faster, more granular econometrics to get a more holistic read across channels at all stages.

Marketing superpowers are also fuelling the full-funnel data offerings of media partners too. We have already seen platforms such as The Trade Desk expand into channels like digital out-of-home and CTV, even launching its own streaming TV Operating System, Ventura. Meanwhile Amazon and other retail media platforms are on a mission to use these superpowers to deliver full-funnel ad solutions seamlessly across all platforms.



AREA TO WATCH 3

Every Superhero Moment Needs a Re-think

Embracing the opportunities that these new marketing superpowers present won't be as straightforward as it sounds. Brands will not be able to simply 'buy' success by onboarding new technology. The barrier will be primarily around skillsets and organisational setup. Here's to the superheroes willing to properly transform and embrace change.

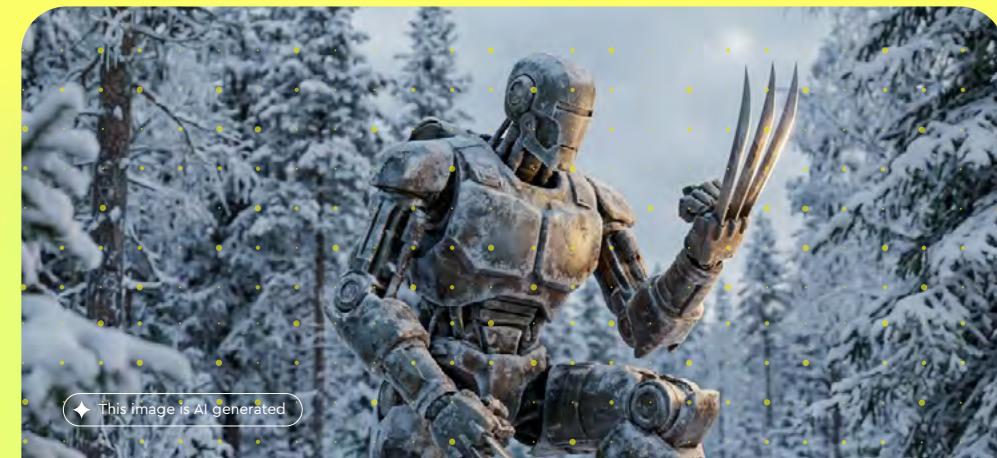
Surfacing and then applying more diverse data isn't easy. Connecting it at scale via AI won't happen on its own. The required transformation is huge, not least because this data doesn't live only in marketing teams. It's with IT, Data, Analytics, Finance and other departments. Disentangling this and allowing data to flow seamlessly through your business means re-thinking a brand's organisation and the skills required beyond as well as within it.

Marketing teams will evolve rapidly in 2026 to reflect this change. In both set-up and skillset, they will need to bridge the space between CMO, CTO and CDO. Hybrid marketers were once the preserve of online performance brands and the team members who can speak the language of both media and the technology and data space. They will now become sought-after across the industry, as the potential for applying data expands across all channels and areas of the marketing funnel. Incumbents should watch out for smaller advertisers able to punch above their weight. Those that can unlock the opportunity will be more agile, better able to connect data, build data partnerships and enable innovation.

What constitutes first-party data is changing too. Clients are going beyond emails or customer IDs, getting closer to transactions and business performance to uncover more granular sales data. For fashion retailers, we can build activity around not just the clothing line but on the right size of item. We're also embracing any dataset that impacts business outcomes. For autos, we can factor in driveway ownership to our geo targeting. For ice cream, we can match distribution data to weather and location data to make a bespoke algorithm for its own cross-channel campaign. It's a time of embracing a more diverse range of data supply, working backwards from the business problem to determine the data sources that can help.

Brands are likely to forge new partnerships. In the FMCG space, many brands that purchased point-of-sale data from third-party aggregators like Circana or Nielsen will build direct relationships with retailers and leverage existing datasets already available to them in the business. They may build their own data warehouses, storing the data they need to inform marketing.

In many of these cases, AI is allowing advertisers to bring previously unused datasets to the table. In place of media metrics, it's easier to optimise to business outcomes like leads, sales and customer lifetime value. Media agencies in particular now face both a challenge and an opportunity. Will they be the ones to connect the data, identify the signals that matter and build AI-enabled approaches that optimise across all these channels to the outcomes that matter? There will be fewer campaigns measured on individual channel metrics, and more omnichannel campaigns measured across the board against sales, revenue and leads. That makes agencies the translation layer between marketing and their data and IT colleagues, who need trusted consultants who know how to handle and apply this data in media. Bring it on.



BRAND CONSIDERATIONS

ASSEMBLE YOUR AVENGERS:

Talent is critical. Hybrid and cross-functional, it will be your people who bridge the IT, data and creative specialisms within your business and enable the seamless data flow required to unleash your superpowers.

FORM STRATEGIC DATA PARTNERSHIPS VIA SECURE DATA COLLABORATION PLATFORMS:

The future of data is collaborative. Leverage secure data collaboration platforms (e.g., InfoSum) with media partners, retailers, and specialist data providers, to accelerate your ambitions around insight, targeting and measurement without compromising privacy.

RE-THINK YOUR DATA ECOSYSTEM:

Move beyond traditional IDs and instead integrate the information that really impacts your business and the behaviour of your consumers. Get granular and transactional and be clear on business performance metrics. Above all, consider the array of external signals out there (geo-location, weather, the built environment, household data).

IDENTIFY YOUR SHORT-CUTS TO GROWTH:

- Don't get caught too heavily in bottom-funnel optimisation. Give your best (human) strategic minds the freedom to look for new patterns within your aggregated knowledge base. Look for the biggest challenges and work backwards.

MAKE THE BOTTOM LINE YOUR BOTTOM LINE:

AI-powered attribution modelling and advanced econometrics make it easier to invest media against tangible business outcomes. Optimise to leads, sales, and customer lifetime value, and originate briefs from this data. It's time to move beyond channel-specific media metrics and make a priority of everyone's ultimate priority.

How are our other 'Operational Innovation' trends doing?

ENTER THE ASSISTANT

- More people are becoming familiar with using LLM-based tools such as Chat GPT and Gemini for a range of tasks. Not surprisingly then, the appeal of integration into apps, devices and platforms, in the form of assistants, is increasing (see *Interfaces Reimagined*).
- As these assistants transform into agents that can execute tasks on people's behalf, there will be some interesting dynamics to consider (see *Invisible Shoppers*)
- Critically, with 25% of people now using AI tools for work, these integrated assistants and agents are transforming businesses, including our own industry.
- Generative AI isn't just changing how marketers interact with customers; it's revolutionising the backend of marketing tasks. Internally, WPP employees have already built over 50,000 agents within WPP Open to streamline client tasks and operations
- Generative AI will continue to create, edit, and optimise ads more effectively, and, in combination with human expertise, will profoundly aid targeting, strategy, and data synthesis in 2026 (see *Marketing Superpowers*). The emergence of synthetic audiences also warrants close attention.

PROXIMITY 2.0

- Geo-location has evolved far beyond a mere cookie replacement for data targeting. With the rise of AI and automation, geo-location now powers approaches infinitely smarter approaches than anything we saw in the cookie-based era, with technology enabling the use of diverse datasets and live feeds of the kind that no human planner would be able to handle alone. In 2026 this will accelerate
- Integrated, cross-channel campaigns powered by single algorithms centred around geo will become commonplace, while AI-enabled attribution modelling will unlock more granular measurement across all channels. Couple this with AI capabilities in the creative space and we'll see more hyper-localised messaging than ever before, with even LLMs enabling local recommendations to users – offering yet another opportunity for brands
- 2026 will be the year we start to talk of geo less as a standalone topic and simply as core part of the way we operate in the new media landscape.



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