

HAVAS Media Network



*Havas Media Network
North America
2026 Predictions Forecast*



Converged for **GROWTH.** Wired for **TRANSFORMATION.**

This report provides actionable predictions for how brands can navigate the 2026 landscape. It's built on the insight that 78% of brands could disappear tomorrow and consumers wouldn't care (up 5% from 2024), creating an urgent need for what Havas calls "Dynamic Adaptability."

2026 is a reckoning year where AI will flood channels with generic content, culture will fragment, finance will demand proof of marketing ROI, and consumer apathy toward brands will intensify. Challenger brands won't win by spending more, they'll win by moving smarter and faster, with deep understanding of consumer behavior and consumption.



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2026 Demands Bold Moves. Make It Count or Be Left Behind - Introduction from Greg James, CEO, Havas Media Network North America



2026 is not a year for playing it safe. It's a year that demands decisive action, strategic clarity, and the courage to make bold moves while staying grounded in what actually drives results.

Standing at the threshold of 2026, we're facing something far more profound than just another year of disruption.

We're witnessing a fundamental recalibration of how brands create value, how consumers make choices, and how our industry must evolve to remain relevant.

Yet within uncertainty always lies opportunity. The brands that will thrive in 2026 aren't those with the biggest budgets or the most sophisticated technology.

They're the ones that master what we call "Dynamic Adaptability", the ability to sense change quickly, respond with agility, and evolve continuously to meet shifting needs.

The facts are sobering

78%

of brands could disappear tomorrow and consumers wouldn't care (up 5% from last year)

75%

of people are more cautious with their spending

69%

will quickly switch brands for better value

65%

of people research extensively before purchasing. Remove the days of legacy brand loyalty are over

The uncomfortable truth is that most of what got brands here won't get them where they need to go.

2026 demands something different: the courage to kill generic automation, the discipline to prove value with precision, and the wisdom to remember that while technology enables, only humans can create meaning.

We exist because our clients trust us. Understanding their business is our business. And navigating change faster than ever before is how we win together.

Welcome to our perspective on 2026.

We invite you to use this as a catalyst for discussion, a framework for planning, and a reminder that the future favors those who act with precision and purpose.



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The future belongs to brands that build and sustain consumer trust. Every interaction, every product, every promise is under the spotlight now. Radical transparency, authentic storytelling, and meaningful customer experiences are no longer optional, they're the foundation of credibility. The brands that win won't just add to the noise - they'll build loyalty, real equity, and cultural relevance.

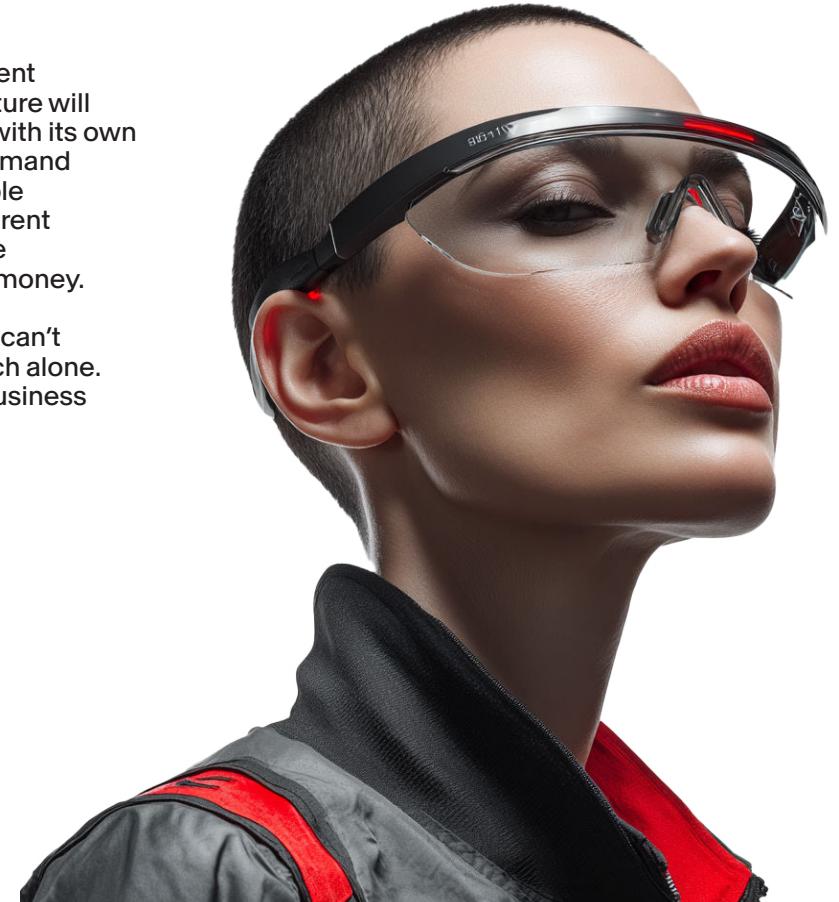
—Jackie Lyons, Chief Planning Officer, Havas Media Network North America



The Age of Adaptation Continues...

2026 is a reckoning year. AI will democratize content creation, flooding every channel with volume. Culture will splinter into countless micro-communities, each with its own language and rituals. Finance departments will demand proof that every marketing dollar drives measurable business impact. And consumers – already indifferent to most brands – will become even more selective about where they invest their attention, trust, and money.

In this environment, the old playbook fails. Brands can't out-spend the competition. They can't rely on reach alone. They can't hide behind vanity metrics while real business value erodes.



Inside this booklet, you'll find 10 key predictions for the year ahead—insights designed to help you stay informed and prepared. Here's a quick preview:

01.

Human Creativity Will Outperform AI-Generate

Volume: As AI makes data easy for everyone to access and analyze, data itself stops being a competitive advantage.

Your edge becomes how well you interpret it and help clients act on it. AI can generate content, but it can't replace the human ability to create feelings, connection, and meaning.

04.

The New Era of Commerce Will Be Cultural, Contextual, and Conversational:

In this new era, commerce is no longer just transactional, it's cultural, contextual, and conversational. The brands that master discoverability, show up where attention lives, not just where transactions happen, and connect culture to commerce through influencer-driven pathways will thrive.

02.

Agencies Will Evolve From Executors To Decision Architects:

As AI-produced content becomes more common, everything starts to look and feel the same, and people stop paying attention. That's why brands that invest in emotional storytelling and real cultural connections will stand out.

05.

Marketing Budgets Will Be Planned Like Investments with Required Returns:

Finance scrutiny intensifies. Marketers need to prove the value of every dollar spent with reliable data and measurable outcomes. First-party data, transparent ROI, and month-to-month accuracy become the standard.

03.

AI Search & Agent Engine Optimization Will Transform

Brand Discovery: Conversational AI (like chatbots or AI assistants) changes how people find information. Instead of typing a search and clicking through multiple results, people get answers directly in conversation.

06.

Privacy Regulation Will Drive First-Party and Zero-Party

Data Investment: Stricter data privacy regulations will shift focus to investing in more accurate, durable, and compliant first-party and zero-party data solutions. Personalization will move from user-level precision to predictive, aggregated signals that still drive performance.

07.

Affluent 50+, Premium Pets, & Connected Health Will Drive

Oversized Growth: The affluent 50+ consumer, premium pet economy, and connected health rise are becoming major growth engines. These sectors are "white space" areas with high growth potential that brands can tap into for new business opportunities.

08.

Gaming Culture & Niche Fandoms Will Reward Year-Round Commitment Over One-Off Activations:

Gaming and fandoms are growing in power. Brands that show up consistently, not just occasionally or for one-off campaigns, earn credibility, build trust, and drive influence. Consistency isn't optional – it's the foundation for lasting impact, turning audiences into advocates.

09.

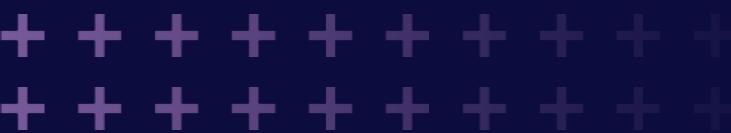
The Creator Economy Will Move from Influence To Ownership:

The creator economy is estimated to be around \$250 billion this year and growing. Creators are no longer just participating in culture. They are producing it, owning it, and turning it into real businesses. The brands that treat creators as co-founders of IP rather than paid media line items will gain the strongest and most defensible advantage.

10.

Sports Marketing Moves Beyond Ads to Authentic, Always-On Fan Ecosystems:

Brands that reallocate toward sports and formats that drive authentic fandom and year-round attention, creator participation, and understand this multi-source, multi-screen reality will be able to create deeper and more consistent relevance.



Where things are **CHANGING** in 2026

Before diving into specific predictions, it's essential to understand the shifts reshaping the marketing landscape in 2026.



The AI Inflection Point

AI is no longer just an experiment, it's now a standard tool that every brand can use. Companies can create content, analyze data, and automate tasks more easily than ever. But there's a catch: because AI makes content creation so easy, it's harder to stand out. This leads to a lot of generic content that all feels the same.

The brands that succeed in 2026 will use AI to boost human creativity and decision-making, not replace it. They'll focus on quality over quantity, knowing that people's attention is limited and trust is even harder to earn.

The Discovery Revolution

Traditional Search is changing fast. Conversational AI, smart agents, and zero-click search are reshaping how people find products and make decisions. Over 60% of Gen Z already uses AI to discover products, and 61% of U.S. shoppers are going straight to Amazon.

Brands need a new approach. Instead of just SEO, they should focus on Agent Engine Optimization (AEO), making content easy for AI to understand and recommend. Clicks matter less; being the answer matters most.

The Finance Reckoning

CEOs are no longer willing to pay for reach just for the sake of reach. With economic uncertainty and increased board scrutiny, marketing is under more pressure than ever. Finance leaders now expect highly accurate reporting, clear attribution, and proof that every dollar spent drives real business results.

This isn't about cutting budgets, it's about earning them. Brands that show financial discipline, strong unit economics, and measurable impact will protect and grow their marketing investment. Those that can't will face ongoing pressure and shrinking budgets.

Culture in Fragments

Audiences are breaking into smaller, highly engaged communities based on passions, identities, and shared experiences, like gamers, women's sports fans, or creator-led movements. Each has its own language, rituals, and expectations.

Brands can't rely on broad messaging anymore. They need to pick the cultural spaces that matter most, commit authentically, and show up consistently. Depth matters more than reach, and active participation matters more than just being present.

The Meaningful Brands Crisis

Our 2025 Meaningful Brands™ study delivers a sobering truth: 78% of brands could vanish tomorrow and no one would care. This represents a 5% increase from last year and an all-time high. Meanwhile, 75% of consumers are more cautious with spending, and 69% are ready to switch brands for better value.

Most brands are failing at the basics. They lack meaning and distinction, focusing on efficiency over connection. The brands that thrive will be the ones that truly improve people's lives through entertainment, community, or meaningful experiences.



PREDICTION 1

Human Creativity Will Outperform AI-Generated Volume

Quality reach beats quantity every time. As AI floods channels with generic content, brands that invest in authentic storytelling, emotional depth, and human craft will command premium attention and loyalty.

In an AI-saturated environment where anyone can generate a thousand pieces of content in five minutes, sameness becomes silence. The brands that cut through won't be those shouting loudest - they'll be those speaking most authentically.

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Traditional advertising is dead. The future belongs to brands that embrace technology while maintaining authenticity with a clear POV.

—Louise Simkin, President, Havas Media Network Canada

Setting the Scene for 2026

AI has democratized content creation to an unprecedented degree. Every brand now possesses the tools to flood channels with volume. Social feeds overflow with AI-generated posts. Programmatic inventory swells with synthetic creative. Influencer partnerships multiply as barriers to entry collapse.

The result? A crisis of attention and trust. Consumers have developed an acute ability to detect the generic, the algorithmic, and the obviously manufactured. They scroll past the formulaic. They tune out the predictable. They've learned to distinguish between content created *for them* and content created by algorithms *for algorithms*.

Strategic Moves for Clients

Audit your content: Remove generic AI-generated messaging that lacks human voice, emotion, or cultural relevance. If your content could apply to any brand, it's not working.

Invest in creators & storytelling: Partner with creators who know your audience and can tell authentic, emotionally resonant stories. Focus on long-form content that shows care and craft.

Define your focus: Choose one or two cultural spaces where your brand has credibility. Show up consistently, and understand the rituals, language, and touchpoints that matter.

Localize your marketing: Tailor your messaging to local contexts. Brands that connect deeply with different audiences will outperform one-size-fits-all approaches. Authenticity requires knowing your audience.



What Our Leaders Say

Authenticity and real human connection will win. Consumers will see through and be turned off by over-reliance on quick, generic AI content. Just because you can create 1000 pieces of content in the next 5 minutes doesn't mean you should.

Quality over quantity is going to matter even more now that AI has completely democratized the ability for everyone to create ridiculous amounts of content, social posts, videos, images, etc. This will put a premium on human thought, creativity, and connection.

—Tim Hemingway, SVP, Commerce, Havas Market North America

Winning brands will elevate emotional stories that connect to deep human desires. Losing brands default to short-termism. Winning brands will capture and maintain attention, and create value for people's lives.

—Amanda Dyke, Managing Partner, Marketing & Communications, Havas Media Network North America

Brands that are willing to try new things and find authentic and new ways to show up for audiences will separate themselves from the pack.

—Blair Ramsey, Managing Partner, Client Experience, Havas Media Network North America



Why This Matters

As AI makes content easy to produce, truly meaningful content becomes more valuable. Brands that focus on authenticity now will create advantages that algorithm-driven competitors can't match. They'll earn lasting attention and build communities of loyal advocates, not just passive viewers.



PREDICTION 2

Agencies Will Evolve from Executors to Decision Architects

Agencies that combine fast AI adoption with strong human judgment will pull ahead. The focus is moving from producing outputs to providing strategic guidance and advanced measurement.

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[AI] should allow for more 'human/IRL' time and less time spent URL processing the work.

—Jess Sheehan, EVP Intelligence,
Havas Media Network North America

AI makes data abundant, but human judgment is what truly sets agencies apart. In 2026, successful agencies won't just create content, they'll act as decision architects, using insights, scenario modeling, and expert analysis to turn data into meaningful strategy.

Amanda Dyke, Managing Partner, Marketing & Communications said, "AI will reset client and agency relationships by giving us deeper human understanding and more space for theory and creativity... When AI handles the heavy lifting like analysis, pattern-spotting, and prediction, we get time back to explore bigger ideas, stretch into unexpected executions, and follow what I like to call the 'human delight tunnels' that lead to work people actually feel."

Setting the Scene for 2026

Clients now have access to the same AI tools, data platforms, and analytics as their agencies. Technology is no longer a competitive edge. What they can't easily replicate is human judgment: knowing which insights matter, which strategies drive growth, and which optimizations actually impact business results.

Client expectations are changing. They're no longer looking for vendors to simply execute tasks, they want partners who can navigate complexity, challenge assumptions, and provide strategic guidance to make confident decisions in uncertain situations.

That's where the role of AI must evolve. Brands need to understand how to use AI to build efficiency and intelligence behind the scenes, powering audience insights, uncovering growth opportunities, and refining creative. Those efficiencies should then be reinvested to drive more impactful media activation, stronger relevance, and higher-performing creative within the right contextual environments.

Strategic Moves for Clients

Set up AI governance: Protect your brand voice, values, and strategy as AI tools expand. Use frameworks to decide which AI applications drive growth and which pose risks.

Train teams to use AI wisely: AI should accelerate insights, not replace creativity. Upskill your teams to analyze data, spot patterns, and work faster, while keeping human creativity central.

Create decision frameworks: Establish clear rules for when to pivot, stay the course, or amplify efforts, so your team can move quickly without chaos.

Design for agility: Competitive advantage comes from the ability to adapt instantly, not from perfect plans.



What Our Leaders Say

Clients will look to agencies not just for outputs, but for judgment - the human filter that decides which AI-generated paths are strategic versus noise. This changes talent culture too: the highest-value people will be those who can contextualize data, challenge assumptions, and guide clients through ambiguity.

—Allison Ciummei, Executive Director, Head of Talent Management, Havas Media Network North America

Beyond efficiency, AI will reshape client-agency relationships by fundamentally changing the value proposition, collaboration models, and accountability structures. The shift is from an agency being a producer of assets to an agency being a strategist and curator of intelligence.

— Trevor Carr, CEO, Noise Digital and Head of CSA, Havas Media Network North America

AI moves agencies from 'execution partners' to 'decision architects.' Agencies will be expected to scenario-model budgets, simulate outcomes, translate brand + performance tradeoffs, and guide clients through measurement maturity - not just run media. Clients will expect agencies to serve as product managers for growth: owning data interoperability, translating AI outputs into decisions, providing CFO-ready ROI proofs, and building experimentation roadmaps. Agencies that only execute channels won't survive.

—Chris Chobanian, SVP, CSA Consulting, Havas Media Network North America



Why This Matters

The agency model is at an inflection point. Agencies that focus on strategic partnership and human judgment will succeed. Those that only deliver outputs and execution risk margin pressure, commoditization, and being replaced by AI or cheaper alternatives.

For clients, this means choosing partners who challenge assumptions, offer broad perspective, and guide you through uncertainty, not just vendors who do what you ask.



PREDICTION 3

AI Search & Agent Engine Optimization Will Transform Brand Discovery

The click is disappearing. Zero-click search will impact traditional SEO and paid search ROI, forcing brands to optimize for how AI agents discover and recommend.

Conversational AI and agent engines compress discovery into single, synthesized responses. Brands that aren't optimized for AI recommendation will become invisible, even if they rank on traditional search.

Setting the Scene for 2026

Search behavior is undergoing its most profound transformation since the rise of Google. Over 60% of Gen Z now uses generative AI to discover products. Meanwhile, 40% prefer TikTok for search. And 61% of US shoppers bypass search engines entirely, heading straight to Amazon.

The shift from click-based search to zero-click answers changes everything. When an AI agent synthesizes information and provides a direct recommendation, users never visit brand websites. They never see traditional search ads. They never enter the funnel marketers carefully designed.

Strategic Moves for Clients

Optimize your content for AI: Use structured data, answer-first formats, and make key brand information easy for AI to find. Your website needs to "speak" AI's language.

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AI search will require us to rethink organic and paid search to make sure we're optimizing for current trends.

—Tim Hemingway, SVP, Commerce, Havas Market North America

Focus on conversational channels: Invest in voice search, AI assistant integrations, and platforms where people discover products through conversation.

Pilot measurable campaigns: Test retail media and CTV campaigns, which offer clear attribution and direct links to purchase.

Build credibility: AI favors trustworthy sources. Invest in high-quality content, expert insights, and partnerships that establish your brand as an authority.



What Our Leaders Say

The emerging platform/format that will demand the biggest strategic pivot is the convergence of AI Search/Answer Engines and Agent Engine Optimization (AEO/GEO). This isn't a new social platform or a new device; it's a fundamental change to the discovery and decision-making layer of the internet.

—Trevor Carr, CEO, Noise Digital and Head of CSA, Havas Media Network North America

AI in search: we're going to have to optimize for AI overviews and ensure our content is structured for AI synthesis.

—Blair Ramsey, Managing Partner, Client Experience, Havas Media Network North America



Why This Matters

The way people find brands is changing fast. Brands that wait risk becoming invisible to consumers who no longer use traditional search. Those that act now can secure a presence in the recommendation engines that will drive purchase decisions for years to come.

This isn't about abandoning SEO, it's about adding AEO while traditional search still works. Brands that master both will gain a clear advantage as the shift accelerates.

PREDICTION 4

The New Era of Commerce Will Be Cultural, Contextual, & Conversational

Retail media has evolved beyond retailer-owned platforms to become a core part of the modern media ecosystem. The lines between commerce and media have blurred, as retail media now spans the full funnel integrating connected TV, social commerce, search, programmatic, in-store activations, and emerging generative AI-driven experiences. Shopping moments will increasingly be embedded within content, culture, and everyday conversations, rather than occurring solely at the point of purchase.

As part of this evolution, Retail Media Networks have positioned themselves as comprehensive, full-funnel ecosystems. Many now offer “one-stop-shop” capabilities that allow brands to activate across on-site, in-store, and off-site channels through a single retailer partner. While this approach may not be optimal for every campaign, it presents a meaningful planning consideration. Operating within a single retailer’s ecosystem often provides enhanced access to first-party data, analytics, and closed-loop attribution enabling more cohesive campaign design and clearer measurement across touchpoints.

This expanded access to data and insights creates an opportunity to move beyond fragmented execution toward more connected, audience-centric strategies. When thoughtfully applied, retail media ecosystems can support integrated storytelling, consistent sequencing, and improved understanding of how media exposure influences both perception and purchase behavior.

Looking ahead, the brands best positioned for success will be those that effectively blend human insight, technology, and creativity to deliver relevant, meaningful shopping experiences. A human-centric approach, one that focuses on the human behind the click, ensures campaigns reflect real consumer needs, motivations, and cultural behaviors, rather than relying just on transactional metrics.

Setting the Scene for 2026

According to Forrester, retail media spending will rise from \$184 billion in 2025 to \$312 billion by 2030. eMarketer says the US alone will reach \$100 billion by 2028. We're seeing an incredible expansion of full-funnel advertising opportunities for endemic and non-endemic brands. Amazon and Walmart have evolved from being just marketplaces to full-fledged ad platforms.

Success will hinge on discoverability and attention, not just transactions. AI and influencer-driven pathways are accelerating, connecting culture to commerce like never before.

Strategic Moves for Clients

Commerce is storytelling: Move beyond transactional ads—embed brand narratives into cultural moments and social conversations.

Use retailer data + behavioral insights to deliver personalized, meaningful experiences.

Retail media is media and can no longer be treated in a silo. Connect awareness, consideration, and conversion seamlessly.

Measure Meaningfully: Go beyond ROAS—track lifetime value and brand equity.



Why This Matters

By 2026, retail media will be media—woven into culture, powered by context, and driven by conversation. This isn't just an ad shift; it's a new operating model for growth.



What Our Leaders Say

In 2026, retail media will simply be media. As Amazon and Walmart evolve from marketplaces into full-fledged ad platforms, success will hinge on mastering discoverability and showing up where attention lives, not just where transactions happen. AI and agentic tools are redefining how consumers choose, while influencer-driven pathways are accelerating, connecting culture to commerce like never before. The brands that win will treat retail media not just as a channel, but as a full-funnel, personalized experience. In this new era, commerce isn't transactional; it's cultural, contextual, and conversational.

—Molly Hop, Managing Partner, Havas Market North America

Using retail media effectively requires a lot more than just buying placements and sponsoring products. Brands jump in quickly, thinking it's the ultimate ecommerce solution. If their product listings aren't optimized, they just end up paying to rank for positions where they should show up organically... If your product isn't set up well and isn't optimized for on-platform search, you're going to pay more in ad dollars because the retailer doesn't know how well you're going to sell. On the flip side, if you focus on your organic presence first, the retailer knows how to categorize and rank your product. As a result, your ad dollars enhance your program rather than compensate for poor setup."

—Tim Hemingway, SVP, Commerce, Hayas Market North America



PREDICTION 5

Marketing Budgets Will Be Planned Like Investments with Required Returns

CFOs will expect nearly perfect reporting and clear proof that marketing drives real business results. First-party data and transparent measurement are no longer optional.

Marketing budgets must be treated like investments, with expected returns, not just as a percentage of revenue. Finance-grade rigor inclusive of accurate data, reliable reporting, and validated ROI is the baseline.

Setting the Scene for 2026

Economic uncertainty has made CFOs the ultimate arbiters of marketing investment. They're applying the same rigor to marketing that they apply to operations, supply chain, and R&D. They want unit economics, incremental ROI proofs, clear attribution, and predictable budget governance. Elisa Klein, EVP, Commercials, Havas Media Network North America says "It'll be about ROI and Reach in balance."

The problem? Most marketing teams aren't set up for this level of financial precision. Budgets are reconciled quarterly instead of monthly, attribution models often overstate impact, and first-party data strategies are still more aspirational than operational.

Strategic Moves for Clients

Own your data: Build first-party data pipelines and consent strategies. Protect personalization and attribution by controlling your customer data and being transparent with consumers.

Align CMOs and CFOs: Create dashboards that track incremental ROI and focus on metrics that matter to both marketing and finance. Move beyond marketing-only KPIs to measurable business outcomes.

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Sales will be the financial metric that matters most.

—Michael Lelievre, Chief Financial Officer, Havas Media Network North America

Invest wisely: Shift spend from underperforming channels to initiatives that deliver proven results. Conduct quarterly audits to identify waste and reallocate toward higher-return opportunities.

Plan from the bottom up: Start with business targets, customers needed, acquisition costs, and profitable channels. Let unit economics, not last year's budget, guide investments.



Why This Matters

The brands that embrace financial rigor today will earn the trust and budget flexibility they need tomorrow. Those that continue operating with loose actualization, unclear attribution, and impression-based reporting will face relentless pressure and erosion.

This isn't about cutting marketing - it's about proving marketing's value so compellingly that finance becomes your advocate for growth investment.



What Our Leaders Say

Plan your marketing budget like an investment with a required return, not a percentage of revenue. Work backward from the business targets... Everything else is noise.

—Taimoor Qureshi, Managing Partner, Finance Media Operations, Havas Media Network North America

Clean, connected 1P data with permission and scale, a unified measurement strategy (MMM + brand equity + incrementality), and a test-and-learn culture supported by AI-accelerated insights. Brands missing even one of these will fall behind.

—Chris Chobanian, SVP, CSA Consulting, Havas Media Network North America

Invest in 1st party data. It's the foundation that unlocks AI, strengthens MMM, reduces waste, and protects against signal loss - and it compounds in value every quarter.

—Trevor Carr, CEO, Noise Digital and Head of CSA, Havas Media Network North America

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As consumer privacy concerns grow, the media value of trust will be a key performance driver

—Chris Chobanian, SVP, CSA Consulting,
Havas Media Network North America



PREDICTION 6

Privacy Regulation Will Drive First-Party & Zero-Party Data Investment

The Havas 2025 Meaningful Brands™ Study revealed 66% of consumers are more concerned than they've ever been about how their personal data is used in the digital world.

Privacy regulations and the end of third-party cookies are changing how brands collect and use data. Instead of relying on tracking, companies will need to increase investment in first-party data (information gathered directly from customer interactions) and zero-party data (details customers willingly share, like preferences or survey answers).

Setting the Scene for 2026

Data privacy and personalization are converging.

Personalization has shifted from a competitive advantage to a consumer expectation. Consumers value convenience and relevance. They expect brands to "know them" and anticipate their needs, but without crossing privacy boundaries.

As privacy regulations tighten and third-party cookies decline, brands will need to emphasize privacy-first, AI-driven personalization strategies built on consent-based first-party and zero-party data.

Traditional retargeting will be replaced by new solutions like server-side tagging, clean rooms, and aggregated signals. At the same time, AI will play a major role in automating data governance, privacy, and compliance.

Strategic Moves for Clients

Invest in consent management, first-party/zero-party data, and ethical AI.

Prioritize transparency and consent to build authentic, trusting relationships with consumers. Without transparency, personalization efforts risk eroding trust instead of enhancing it.

Use AI to automate compliance and improve data management.

The future is about balancing relevance with respect for consumer data. Trust will be a key performance driver. The most dynamic and meaningful brands inspire consumer confidence that their data is not only being handled responsibly, but safely.



Why This Matters

Building trust through privacy-first strategies isn't just about compliance – it's what drives loyalty and long-term growth. First-party and zero-party data give brands the foundation to deliver personalization without crossing privacy lines.



What Our Leaders Say

Consumer privacy is critical. By mitigating privacy concerns through the right consent frameworks, companies can enhance trust which in turn builds greater consumer loyalty. And let's not forget that there are a lot of rich signals in aggregate data too - advertisers and agencies can create custom audience segments using geotemporal, contextual, and demographic signals to deliver measurable gains in business outcomes.

—Ram Padmanabhan, Managing Partner, CSA Science, Havas Media Network North America

The winning formula is: 1P data + federated learning + on-device modeling = relevance without overreach. Regulation won't kill personalization — it will force better architecture. Server-side tagging, clean rooms, and model-based attribution will thrive. The biggest impact: personalization will move from user-level precision to predictive, aggregated signals that still drive performance. One of the most underestimated AI applications is the use for data governance. Automating how we manage customer data, privacy, and compliance will become standard, with CDP platforms using AI to make these processes seamless and unlock better, more personalized experiences.

—Chris Chobanian, SVP, CSA Consulting, Havas Media Network North America

Consumer skepticism of advertising and concerns about privacy are on the rise, especially when it comes to AI.

—Maggie Zak, EVP, Audience, Measurement and Analytics, Havas Media Network North America

What our **LEADERS** are **SAYING**

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To unlock the full potential of AI-driven personalization, brands must strike a careful balance between innovation and privacy. Building trust through transparency, user control, and ethical practices is essential. First-party data must serve as the strategic foundation—without it, brands can't fully harness the power of AI. Personalization is now heavily focused on First-Party Data (data collected directly from a customer on a brand's own website/app) and Zero-Party Data (data explicitly and willingly shared by a customer, like stated preferences or survey answers). These are not only more accurate, but trustworthy and compliant. Personalized retargeting, which relies heavily on third-party cookies, becomes significantly limited, requiring new solutions like Conversion APIs or aggregated, anonymized ad-platform data.

—Trevor Carr, CEO of Noise Digital and Head of CSA, Havas Media Network North America





PREDICTION 7

Affluent 50+, Premium Pets, & Connected Health Will Drive Outsized Growth

While many brands focus on Gen Z with generic tactics, three categories stand out for growth - affluent consumers over 50, premium pet products, and connected health devices. These audiences have money, motivation, and behaviors that can be measured and acted on.

Setting the Scene for 2026

The marketing industry often focuses on youth, overlooking huge opportunities with older audiences. Gen X and Boomers control most of the wealth, show higher purchase intent, and are more brand loyal but are largely ignored while brands chase TikTok trends.

At the same time, pet ownership is at an all-time high as younger generations delay or skip having children. Pet parents are spending premium dollars on nutrition, healthcare, entertainment, and accessories, sometimes more than previous generations spent on kids.

Strategic Moves for Clients

Design tailored journeys for 50+ audiences. This demographic values utility, premium service, and experiences that respect their time. Create messaging and products that emphasize quality, sophistication, and tangible benefit.

Expand offerings for pet owners. Pets are replacing children for a generation that may not be able to afford children. Develop premium offerings, subscription models, and community experiences that treat pets as family members.

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Winning brands will first recognize what their customers want and then build technology solutions that connect with them.

—Ram Padmanabhan, Managing Partner, CSA Science, Havas Media Network North America

Develop health-focused offerings leveraging connected devices. Partner with wearable platforms, create integrations with health apps, and build products that use real-time health data to deliver personalized experiences.

Build trust & transparency. All audiences care about honesty, data privacy, and brands that genuinely care. Focus on providing value and respect, not just pushing lots of messages or sales.



Why This Matters

The brands that recognize these growth horizons will be ahead of their competitors. They'll build loyal customer bases, high-margin products, and defensible market positions while others continue chasing saturated demographics with undifferentiated tactics.



What Our Leaders Say

The connected health space is growing drastically year on year with some forecasts projecting a trillion-dollar market by 2030. Connected health devices and wellness apps sit between culture (routines, rituals, self-expression) and science (data, measurement, credibility) creating the new daily operating system of people's health.

—Ray Romero, Managing Partner, Client Experience, Havas Media Network North America

The North American consumer is bifurcating between high-end consumption and value conscious behaviour that is removing the middle-class consumer. Brands that continue to pursue a mass consumer via traditional mass media will lose to premium lifestyle brands. Consumer discontent and distrust of brands is accelerating and can be seen in digital signals such as 'Silent Churn' (people silently switching brands), Failed AI service chatbots, the rise of visual AI generated 'slop' all pushing consumers away from brands that don't personalize experiences in an authentic manner.

—Trevor Carr, CEO of Noise Digital and Head of CSA, Havas Media Network North America

Anything targeted to the over 50s. With GLP-1s, Gen X'ers are going to live forever and are the last generation with meaningful cash to spend. Luxury cruises, high end travel, premium healthcare, pickleball apparel. Also, I'd watch the pet industry. Pets are replacing children for a generation that can't afford children. Premium pet everything.

—Adam Rattner, Chief Growth Officer, Havas Media Network North America



PREDICTION 8

Gaming Culture & Niche Fandoms Will Reward Year-Round Commitment Over One-Off Activations

Gaming is dynamic and community-driven, which means the goal isn't to control every variable, it's to participate with intention. The most effective brand approach blends smarter tools with clear values. Instead of relying on static whitelists, brands should use dynamic suitability solutions that can interpret voice, chat, user generated content, and voice on demand in real time. When greater predictability is required, brands can invest in more controlled environments, such as private servers, curated creator collectives, and branded in-game events; that balance cultural relevance with brand safety.

Crucially, suitability should be anchored in values, not endless keyword lists. Focusing on principles like avoiding hate, harassment, and extremism enables brands to show up confidently in gaming spaces while protecting their reputation and supporting the cultural energy that makes this category powerful.

HAVAS Media Network

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Participate with intention... Treat culture like a commitment, not a media plan.

—Andrea Isaac, Managing Partner, Havas Play North America

As gaming becomes more user-generated and unpredictable, brands must shift from control to calibration. Safety comes from understanding communities, not avoiding them. The strongest brands establish clear guardrails, partner with trusted creators, and invest in environments that reflect their values. Suitability becomes a cultural fit exercise, choosing worlds where the brand adds to the experience rather than trying to sanitize it.

This requires focus and commitment. Brands should choose specific cultural territories and stay there, treating niche gaming communities and fandoms as cultural engines rather than channels. Long-term engagement, whether through recurring campaigns, co-created content, and/or real community involvement, builds credibility and impact. Gaming and specialized fandoms aren't one-off marketing moments; they're living communities that reward brands willing to show up consistently and contribute meaningfully.

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Gaming feels like it's at a tipping point similar to where influencers were a few years ago. We'll see widespread adoption of fandom-driven strategies.

—Ross McCormack, VP, Influencer Marketing, Havas Play North America

Setting the Scene for 2026

Mass culture has broken into many niche communities. These groups are built around shared passions like gaming, music, fashion, or other cultural movements; and have their own languages, rituals, and ways of communicating.

Traditional advertising doesn't work here.

These audiences are smart, skeptical of brands that show up only briefly, and quick to spot inauthenticity. They respond best to brands that commit long-term and add real value, and they reject opportunistic efforts.

Strategic Moves for Clients

Commit to cultural lanes with recurring branded experiences. Pick gaming or fashion or a specific fandom and show up consistently. Create weekly formats, seasonal programs, or annual rituals that fans anticipate and participate in.

Measure success through participation metrics. Track fan activity like user-generated content, community retention, watch time, and other engagement signals, beyond traditional brand KPIs, to understand real cultural impact.

Invest in the community. Support grassroots events, emerging talent, and creator ecosystems. Show that your commitment goes beyond marketing; it's about helping the culture grow.



Why This Matters

Brands that commit to culture gain advantages traditional ads can't match.

They earn loyal fans, grow communities sustainably, and gain permission to engage in ways that boost both brand value and sales.



What Our Leaders Say

Gaming isn't just a channel anymore, it's becoming the cultural operating system. It's where music launches, fashion drops, and sports activations live.

—Alessia Grosso, Head of Strategy and Product, Havas Play North America

...Pick one or two cultural lanes where your brand has a right to play, then build recurring ideas, creator partnerships, and experiences that show up there all year. Fans respond to consistency and contribution, not one-off moments.

—Andrea Isaac, Managing Partner, Havas Play North America

As brand advertising & integration into gaming becomes the new normal, we'll see a rapid increase in investment in the space. But with this explosion of spend will come a need to differentiate and diversify. To drive ownability, investing brands will need to stop thinking platform-first – and instead start thinking gamer-behavior first by identifying the channels, platforms and moments that are relevant to their brand and target audience.

—Patrick Tierney, Director, Havas Play North America

What our **LEADERS** are **SAYING**

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2026 is the year brands finally start closing the gaming gap. Investments will move away from one-off sponsorships and influencer deals toward persistent, commerce-driven ecosystems inside games. Think branded worlds, co-created IP, and live-service partnerships that feel native to the experience. Esports orgs will also continue to evolve into lifestyle brands, blending gaming with music, fashion, and live experiences. The big shift is brands realizing they can't just advertise to gamers they need to be part of the worlds that gamers inhabit. That's where cultural relevance will come from.

—Alessia Grosso, Head of Strategy & Product,
Havas Play North America



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Fandoms in 2026 get smaller, smarter, and harder to fake. People aren't watching everything. They are watching things that feel personal, communal, and worth their time. Brands connect by moving into the micro fandom layer, showing up in the rituals, creators, and conversational loops that make these communities feel alive. It's less about scale and more about knowing the culture inside the culture. Focus on usefulness. In a saturated, AI shaped, attention-starved world, the brands that win in 2026 are the ones that give people something they actually need. If you can solve for humans, culture will take care of the rest.

—Juliet Tierney, SVP, Partnerships & Culture Strategy,
Havas Media Network North America





PREDICTION 9

The Creator Economy Will Move from Influence To Ownership

Creators are taking control. The creator economy is huge—about \$250 billion—and growing fast. But the big shift is that creators aren't just influencers anymore. They're building their own businesses, owning their ideas, and creating their own IP.

Andrea Isaac, Managing Partner of Havas Play North America said: "What's really interesting is how the creator space is moving from influence to ownership. Creators are no longer just participating in culture. They are producing it, owning it, and turning it into real businesses, leagues, and IP that compete with established media."

Fans are becoming more than passive viewers; they're actively co-creating through mods, spin-offs, and AI-powered content. Fandoms are splintering into smaller, niche communities where participation matters, and brands that design interactive, portable experiences will win. Big follower counts won't cut it anymore—conversion and credibility are the new currency. In a world flooded with AI content, people crave real voices and intentional formats, making authority more valuable than scale.

Setting the Scene for 2026

Creator-led content grabs attention where people actually spend time. Jackie Lyons, Chief Planning Officer for Havas Media Network North America says creator content as a media effectiveness lever will be critical in 2026.

When creators own IP and build businesses, they're no longer just amplifying someone else's message—they're creating worlds, leagues, and franchises that rival traditional media. That means brands aren't just buying influence; they're negotiating with cultural powerhouses.

This makes culture more decentralized.

Instead of culture being dictated by big studios or networks, creators and their communities are shaping trends in real time. Brands can't just "tap in" with ads—they need to participate and co-create to stay relevant.

Strategic Moves for Clients

Brands should shift from influencer deals to creator collaborations at scale, enabling participatory storytelling. Build content and experiences with creators that feel natural to the community. Share ownership to deepen engagement and drive commerce.

Focus on smaller, high-intent spaces where trust and engagement are stronger. Build content that feels intentional, not disposable.

Design for participation. Fans want to be part of the story. Consider open ecosystems, like remixable assets or interactive formats that encourage and empower co-creation.

As AI-generated content grows, human clarity and expertise become your differentiator. Brands that show real knowledge and authenticity will stand out.



What Our Leaders Say

People are increasingly gravitating toward smaller, interest-based spaces over broad, algorithmic feeds. We'll see stronger niche communities and creators building formats that feel more intentional and less disposable.

—Andrea Isaac, Managing Partner, Havas Play North America

The creator economy will evolve into community-powered ecosystems. Fans won't just consume; they'll co-create IP extensions, branded mods, and AI-assisted content.

—Alessia Grosso, Head of Strategy & Product, Havas Play North America

Fandoms are fragmenting into micro-communities, and fans expect participation, not passive consumption. The next wave will be creator-led fandom activations with content that isn't just watched; it's an event fans feel part of.

—Ross McCormack, VP, Influencer Marketing, Havas Play North America

People turn to micro media, trusted experts, and credible niche voices as AI floods the landscape. In 2026, Brands can be the experts people seek, but only if they show real knowledge and human clarity.

—Juliet Tierney, SVP, Partnerships & Culture Strategy, Havas Media Network North America



Why This Matters

Fans see creators as authentic and relatable. When creators become cultural architects, their influence grows beyond social posts—they set norms, aesthetics, and even product expectations. Brands need to earn trust through collaboration, not control.

Lead with creator content that prioritizes engagement through authentic connection in high attention spaces.

—Jess Sheehan, EVP Intelligence, Havas Media Network North America



PREDICTION 10

Sports Marketing Moves Beyond Ads to Authentic, Always-On Fan Ecosystems

Fans are no longer passive spectators; they're active participants in a creator-led, tech-powered ecosystem. Streaming platforms are merging traditional sports and esports into shared environments that feel more like Twitch than TV—multiview screens, live stats, betting integrations, and highlight carousels are now standard.

Fans expect authenticity, inclusivity, and sustainability—not just big ads during big games. They want brands that show up consistently, co-create with creators, and add real value to the fan journey.

Havas Play North America's Managing Partner, Andrea Isaac shared: "According to PWC, over 90M people in the US are streaming sports monthly in 2025. Platforms like ESPN Unlimited are integrating WWE and NFL into one-app, Twitch-like environments—multiview, live stats, betting, creator-driven highlights. In 2026, smart brands won't plan by format; they'll plan by fandom, with one playbook across stadiums, streams, socials, and servers. Measurement will unify under the same KPIs—attention, participation, commerce. Creators won't be 'amplification'; they'll be primary talent in sports and esports. The old split between 'sports marketing' and 'gaming/esports' is a P&L artifact, not a fan reality, and the smartest brands get that."

Setting the Scene for 2026

2026 will be a watershed year for sports and sports marketing. The global stage will be dominated by mega-events like the World Cup, driving unprecedented attention and engagement across continents. But the real story isn't just about size—it's about how fandom is evolving and what that means for brands.

At the same time, women's sports are surging, with leagues like the NWSL and WNBA commanding rising rights values and deep emotional investment. Esports is resetting and rebuilding, creating grassroots structures that mirror traditional sports while innovating for digital-first audiences.

Layer on AI-driven personalization, Web3-style fan utilities, and data analytics, and the playbook for sports marketing looks radically different.

Strategic Moves for Clients

Think beyond tentpoles: legacy tentpoles that no longer spark conversation should be treated selectively. Invest in properties that drive year-round, authentic fandom and creator participation.

Don't chase size – chase cultural meaning. Any sport can be a strong opportunity if it aligns with a brand's strategic arena. A niche sport with engaged fans and strong creator influence can outperform a legacy event.

Design for community, not just reach: Focus on fan behaviors – streaming, sharing, betting, and IRL gatherings – rather than just media buys.



Why This Matters

The 2026 World Cup will be massive—but the real winners will be brands that have earned trust through consistent engagement, not just big stadium ads.

Women's Sports & Collegiate Sports represent the clearest growth opportunities, blending competition with cultural movements like social justice.

Long-Tail Sports & Niche Communities will create the next wave of culturally relevant brands.

In 2026, sports will be the most dynamic cultural arena, from the Winter Olympics in Italy to the World Cup in North America. Growing cultural currency will be by playing by the new rules – creator-first, community-driven, and fandom-focused.



What Our Leaders Say

Women's sports represent the clearest growth opportunity. The NWSL, WNBA, and global women's football are seeing rapid audience growth, rising rights value, and deep emotional investment. Collegiate sports also represent a major untapped opportunity... blending local pride, generational fandom, and consistent in-person participation. Likewise, the next wave of culturally relevant brands will come from investing in long tail sports and niche communities rather than the biggest tentpoles.

—Andrea Isaac, Managing Partner, Havas Play North America

Traditional sports and esports finally meet in the middle as 'competitive culture.' Media strategies shift from treating them as separate categories to designing for shared behaviors: fandom, streaming, creator led commentary, and world building. The convergence happens around how people watch, not what they watch, creating one ecosystem where highlights, personalities, and communities drive attention.

—Juliet Tierney, SVP, Partnerships & Culture Strategy, Havas Media Network North America

Over the next year, we'll see some elements of traditional sports & esports media strategies pull further apart, while others move closer together, such as development of grassroots esports infrastructure to mirror traditional sports and allow for brand partnership and support; the growth of esport teams, orgs, and players as beacons of fandom; and events as opportunities for IRL community togetherness.

—Patrick Tierney, Director, Havas Play North America

The Flip Phone **RENAISSANCE... you be the JUDGE**

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Flip phones, like the Motorola Razr, are going to come back like it's 2004! Humanity is going to reject "smart" phones, AI, push notification, social media, and unlimited access to everything all the time for the simplicity of talk, text, and an occasional game of Snake... While this trend is going to make humanity happier as a whole, it's going to force advertisers to get more creative because we'll lose access to everyone's pocket computers... Maybe this is more wishful thinking than a hot take...

—Tim Hemingway, SVP, Commerce,
Havas Market North America



Be Aware of the Wildcards That Could Change Everything

These predictions show what we expect to see, but there are also wildcard events that could shake things up and are worth your time monitoring.

Privacy Regulation Acceleration: New federal privacy laws in the U.S. could disrupt targeted advertising, pushing brands to rely more on first-party data and contextual targeting.

Economic Shock: Recession, geopolitical crisis, or financial market disruption could compress consumer spending and marketing budgets simultaneously, accelerating the fight to prove measurable performance.

Platform Implosion: If a major social or retail platform loses consumer trust due to a data breach, controversy, or leadership crisis, billions in ad spend could shift quickly.

Creator Unionization: If major creator coalitions successfully organize for increased terms from platforms/brands, the influencer marketing model could be restructured.

AI Plateau: If generative AI hits a limit and can't deliver the creative or strategic results expected, the industry could face over-investment in tools that underperform.



Conclusion: 2026 Is A Year For Intentional Action

2026 is not about disruption for disruption's sake. It's about being intentional.

The agency-client relationship is being redefined. Not because technology demands it, but because the complexity of the landscape does.

Clients don't need agencies that simply execute faster. Every agency can execute fast. They need agencies that help them decide well under uncertainty.

The brands that thrive will balance bold moves with responsible execution. They'll blend AI-driven efficiency with human creativity and cultural empathy. They'll demand financial rigor while investing in long-term brand building. They'll commit to cultural communities while measuring business impact.

This is a moment to:

Lead with clarity

Commit to spaces where your brand can add real value

Act decisively when clarity emerges

Build systems that adapt as fast as the world changes

Measure rigorously to know what's working

Never lose sight of the human connection at the heart of every transaction.



At Havas Media Network North America, we're converged for growth and wired for transformation. Our cross-functional integration means insights from analytics inform creative strategy. Finance discipline strengthens media effectiveness. Cultural intelligence shapes commerce activation.

We know what it takes to build challenger brands because we are a challenger brand. We understand the pressure to prove value because we face it ourselves. And we've built the capabilities, partnerships, and perspective to help our clients navigate complexity with confidence.

That's the mandate we're embracing at Havas Media Network North America. We're not positioning ourselves as the smartest people in the room. We're positioning ourselves as the partners who help our clients make the smartest choices.

The brands that win won't necessarily be those with the most resources. They'll be those with the clearest thinking, the most disciplined execution, and the courage to commit to what matters while ignoring what doesn't.



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Havas has always been more about creating culture than just surrounding it. We know what it takes to build a challenger brand. Because we are a challenger brand.

—Adam Rattner, Chief Growth Officer,
Havas Media Network North America



We're here to help you navigate that journey.

Let's move forward with clarity, conviction, and a shared commitment to building brands people would genuinely miss if they disappeared.

A large, bold, red 3D-style logo for 'HAVAS' is mounted on the side of a modern building with a dark, textured facade. The letters are slightly slanted, giving them a dynamic appearance.

About This Report

This report represents the collective intelligence of Havas Media Network North America, drawing on perspectives across Marketing, New Core (Market, Play, CSA), Strategy, Analytics, Health & Wellness, & Finance. Statistics showcased are drawn from Havas **Meaningful Brands™ 2025** global study (93,100 respondents across 10 markets, 1,898 brands).

For more information or to discuss how these predictions impact your brand's 2026 planning, contact Amanda Dyke, Managing Partner, Marketing & Communications, Havas Media Network North America, amanda.dyke@havasmedia.com