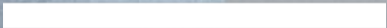




**HUMAN TRUTHS IN
THE ALGORITHMIC ERA
2026 MEDIA TRENDS**

INNOVATING TO IMPACT



dentsu

INTRODUCTION

Just a few years ago, the media landscape seemed to be dominated by a handful of platforms across social, commerce, search and video. Between them, they captured the lion's share of strategic audience data and advertising spend.

Then came the disruptors. TikTok rewired how people discover culture. OpenAI and its peers blurred the line between search engine and oracle. The certainties of the 2010s suddenly looked fragile.

By 2026, the foundations may crack even further, illustrated by international trading disputes potentially reshaping how and where people spend, and by different regional approaches in the AI race.¹

So how can brands drive growth and thrive in these times of guaranteed uncertainty?

They must focus on what remains stable over time by rooting their strategic thinking in core, invariable human behaviors to rigorously evaluate where to invest in the Algorithmic Era.

In this 16th annual edition of *Media Trends*, dentsu experts explore how brands can anchor their thinking around three enduring human truths to grow in 2026:

PART 01 / WE ARE SIMPLE UNTIL WE ARE COMPLEX

We examine what people's motives for convenience mean for brands looking to maximize the search, agentic AI, and commerce opportunities.

PART 02 / WE ARE SOCIAL ANIMALS

We explore how brands that nurture people's desire to connect and socialize across communities of interest, live experiences, and messaging can gain a significant competitive advantage.

PART 03 / WE DON'T READ ADVERTISING

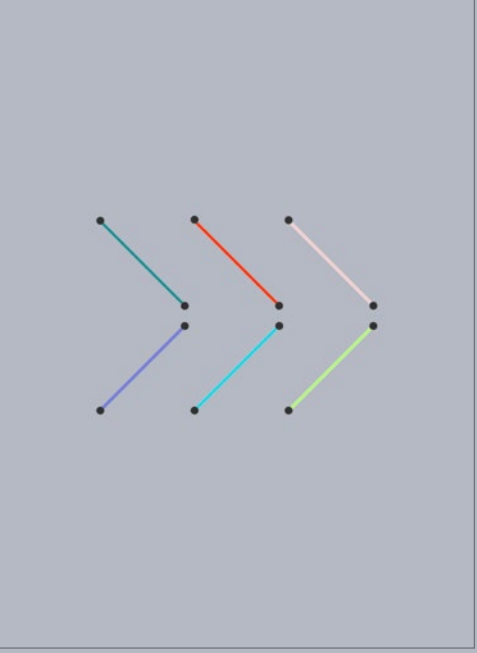
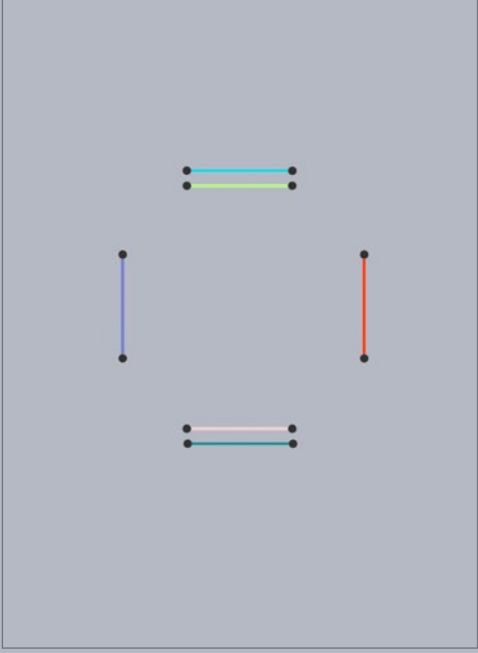
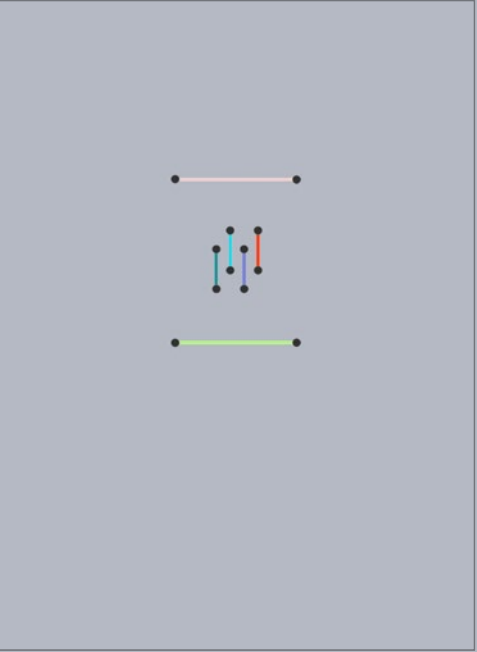
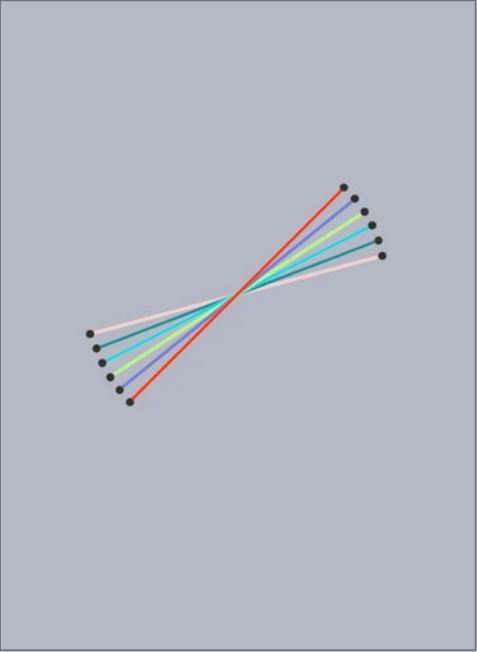
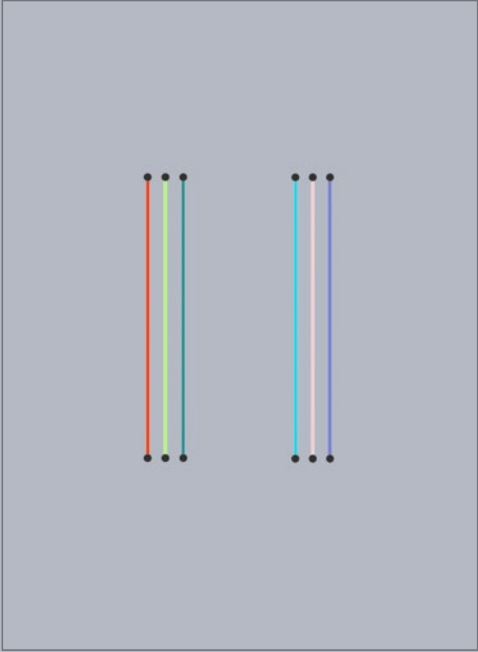
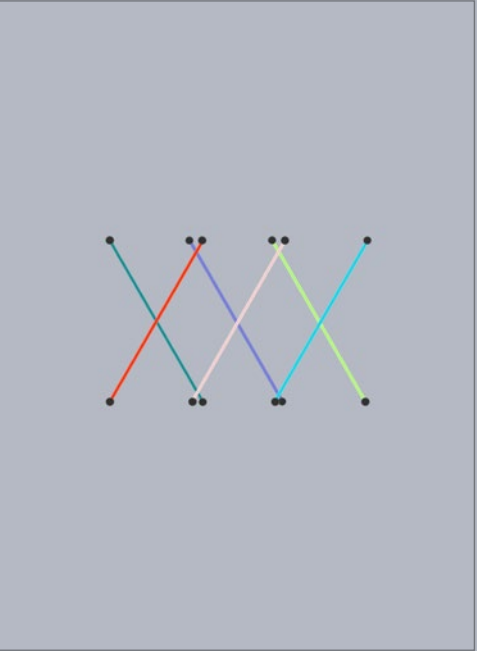
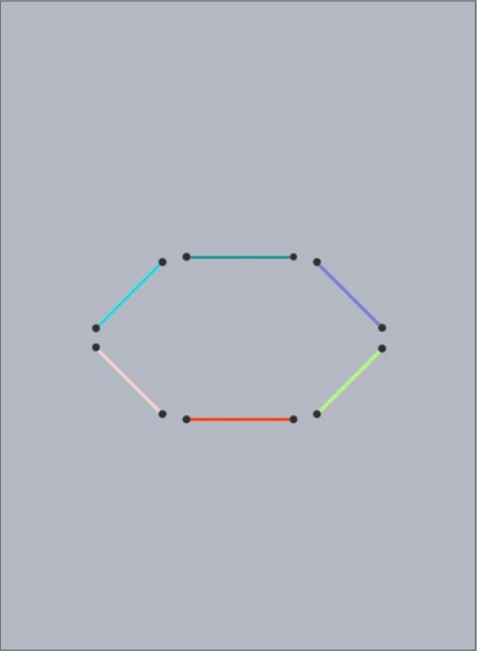
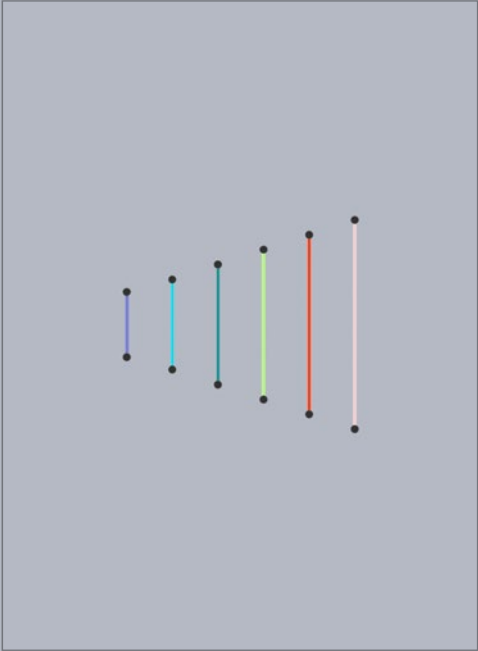
We cover how brands can overcome advertising's diminishing returns through better signal quality, a more sophisticated understanding of attention, and new opportunities across the entertainment spectrum.

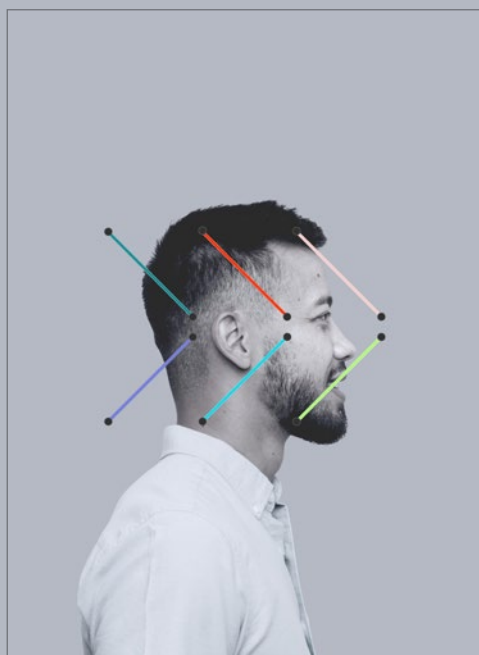
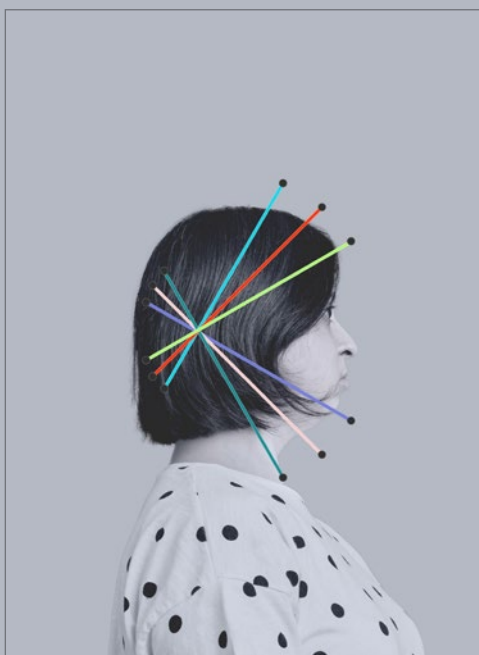
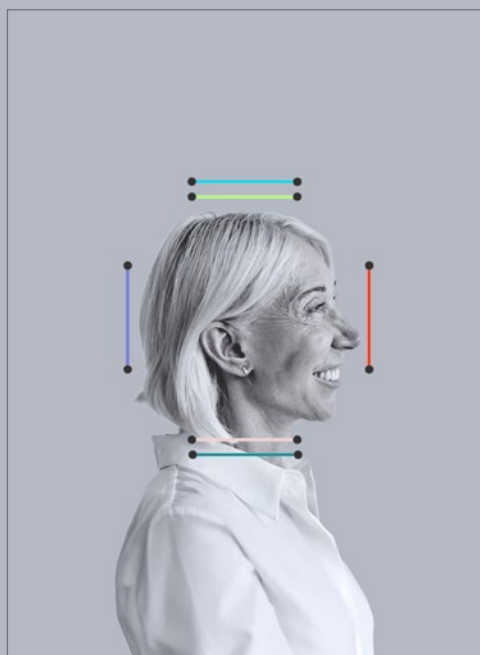
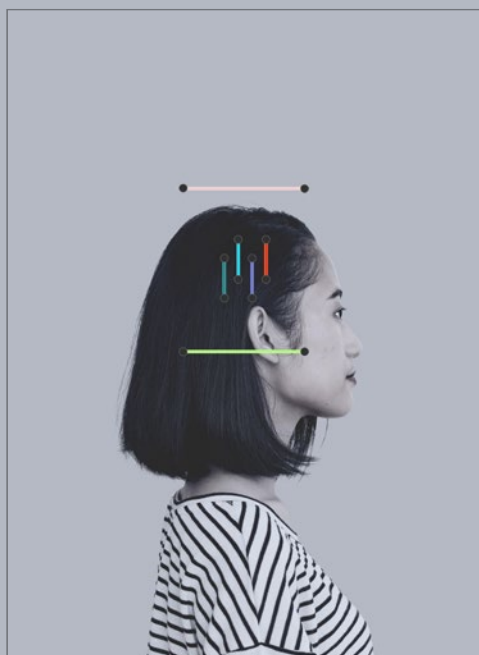
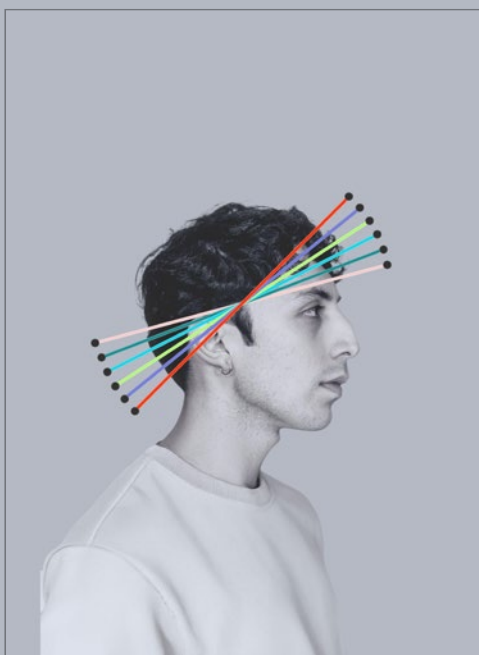
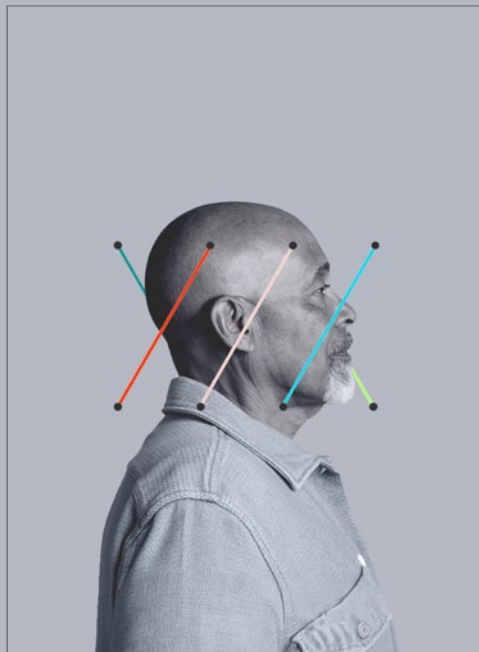
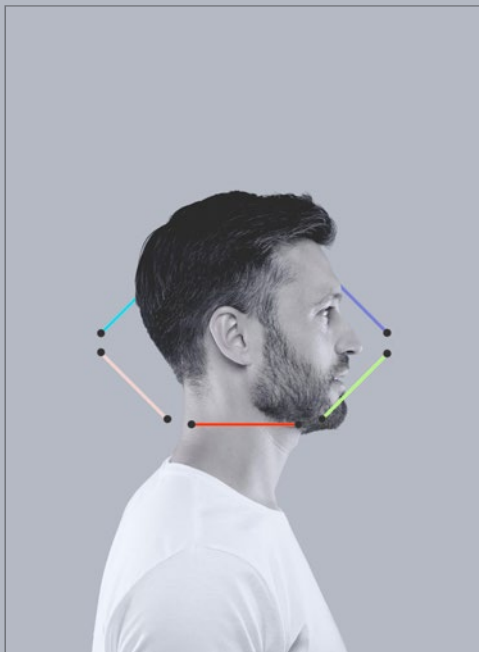
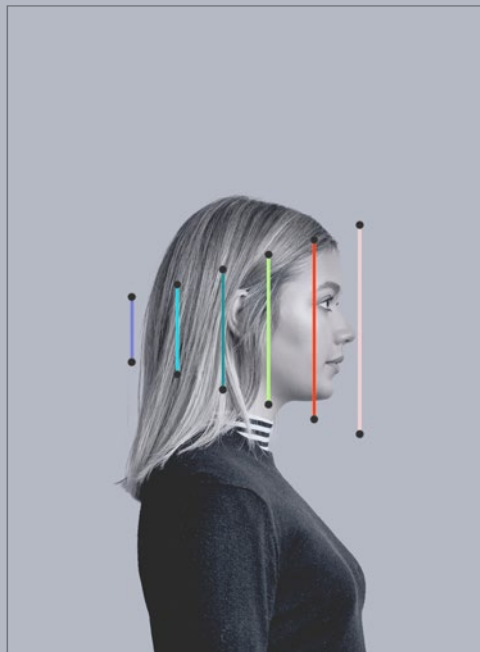
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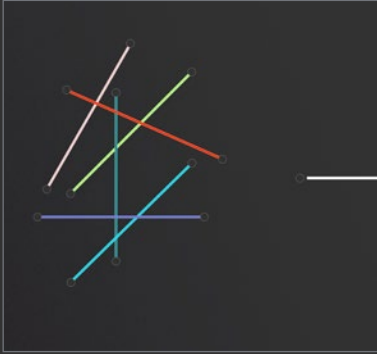
Will Swayne

Global Practice President,
Media and Integrated Solutions,
dentsu

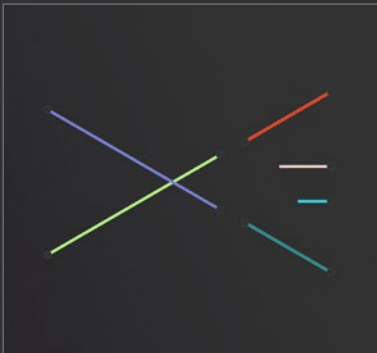




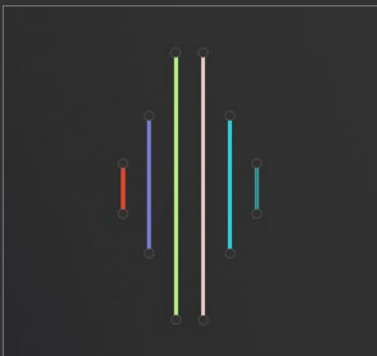
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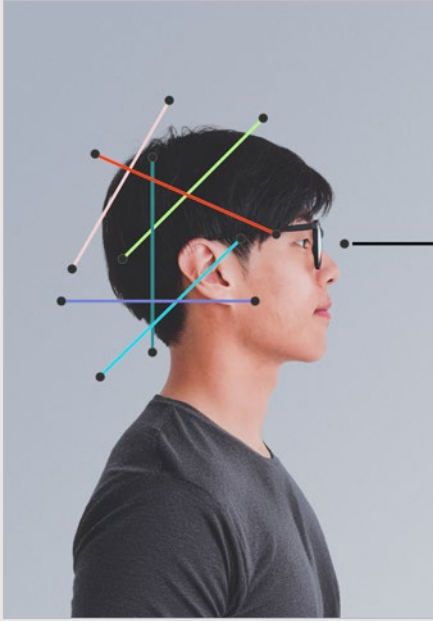
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PART 01

WE ARE SIMPLE UNTIL WE ARE COMPLEX



WE ARE SIMPLE UNTIL WE ARE COMPLEX



No one has ever enjoyed searching for a parking spot. No one has ever found it fun to see their payment declined. And no one will ever enjoy going through a content-bloated page about the history of quinoa when looking for how long it takes to cook.

In a complex world, our brains are wired for simplicity. At dentsu, this has been a consistent insight for as long as we have tracked consumer preferences: the number of UK adults who say they like to follow well organized routines has been remarkably stable for the past 15 years.²

Recent advances in algorithms and AI help us achieve a more convenient life and streamline mundane tasks.

Yet, humans tend to like convenience, but only to an extent. We are not machines, and sometimes the most efficient experience is not the most enjoyable. The right amount of friction can foster a sense of community, choice and trust. And if the Labubu plush toy frenzy has taught us anything, it is that the thrill of the chase and the fear of missing out are powerful drivers.

In 2026, brands will need to strike this delicate balance across search, agents and commerce to win hearts and minds.



TREND 1

SEARCH EXPERIENCE OPTIMIZATION TAKES OVER

As search becomes more conversational and multi-modal, new requirements emerge to best reach audiences and support them through the entire user journey.

TREND 2

DIGITAL DELEGATION TURNS HEADS

Although AI agents hold the promise of unprecedented convenience for consumers, deploying them without strategic thinking will not solve marketing challenges, it will multiply them.

TREND 3

THE FRICTION PARADOX DEFINES COMMERCE

As the consumer journey becomes increasingly non-linear, marketers must manage friction strategically, using it to spark desire, simplify shopping, and tailor experiences to audience moods and contextual cues.

TREND 1

SEARCH EXPERIENCE
OPTIMIZATION
TAKES OVER



PART 01

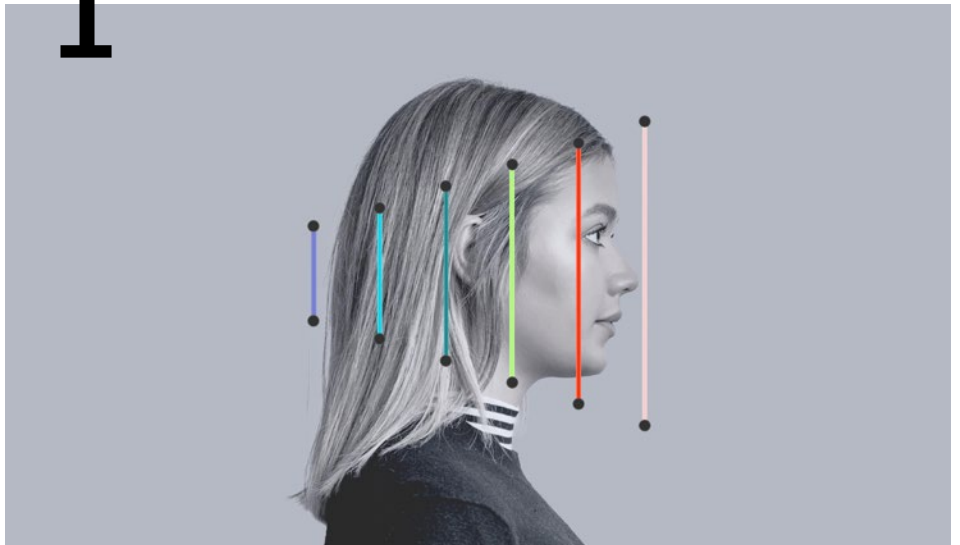
WE ARE SIMPLE UNTIL
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TREND 1

SEARCH EXPERIENCE OPTIMIZATION TAKES OVER



Search is undergoing a profound transformation as artificial intelligence permeates our screens and devices. In 2026, brands will need to rapidly evolve their search strategies to keep pace with consumers.

In recent years, many platforms have challenged Google's dominance of the search landscape, from social platforms like TikTok where people spend their time, to retail platforms like Amazon where people spend their money, to assistants like ChatGPT that have introduced an entirely new way of interacting with information.

While nearly three decades of search muscle memory won't disappear overnight, marketers must now look beyond traditional paid search and search engine optimization to adapt to these new, growing search behaviors.

SEARCH EXPERIENCE OPTIMIZATION ENTERS THE STAGE

Search is expanding both horizontally across platforms and vertically throughout the marketing funnel. The rise of longer, more nuanced queries signals a shift in intent, no longer limited to transactional motives but becoming increasingly emotional, early stage, and context driven. The key question for brands is now how

will their content appear and rank in all these moments, regardless of how consumers search.

To answer this, marketers must identify the new front doors that customers use to discover their brand, and assess their current visibility across each. For example, on assistants powered by Large Language Models (LLMs) such as Gemini, marketers can evaluate their brand's share of voice, sentiment, and portrayal. From there, they can develop a coordinated approach to manage content and media across both general search engines (GSEs) and specialized vertical providers (SVPs).

This approach requires a holistic view of the user journey. It involves bringing together traditional search engine optimization with LLM optimization, social search optimization, retail search optimization and mobile app optimization. Together, these disciplines form the foundation of search *experience* optimization, which is becoming the new gold standard for enhancing discoverability across search touchpoints.

CONTENT AND DATA FUEL SEARCH SUCCESS

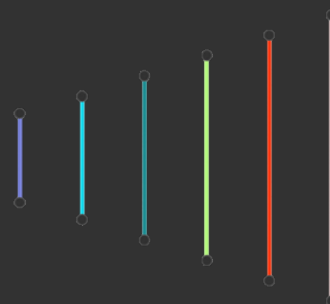
Despite the rise of zero-click searches resulting from generative responses, content on brand websites remains critical. Landing pages signal to assistants and search engines that the content is authoritative, valuable, and trusted. They also power new paid search formats such as Google's AI Max, which dynamically generates search ads. It also means that marketers must make sure that all their content, including visuals, can be successfully parsed by LLMs. Staying ahead of the curve in optimizing for these types of zero-

click search results and LLM-based search experiences will ensure that brands are still visible to their target audiences while direct site traffic declines.

Data increasingly acts as a true differentiator, as well. As traditional targeting options diminish, first-party data becomes essential for gaining ad exposure over competitors. Structured data also plays a key role in helping LLMs process information. For example, a retailer may use three distinct product feeds to optimize search presence: one for organic listings, one for paid promotions, and a new LLM feed enriched with FAQs, reviews and more.

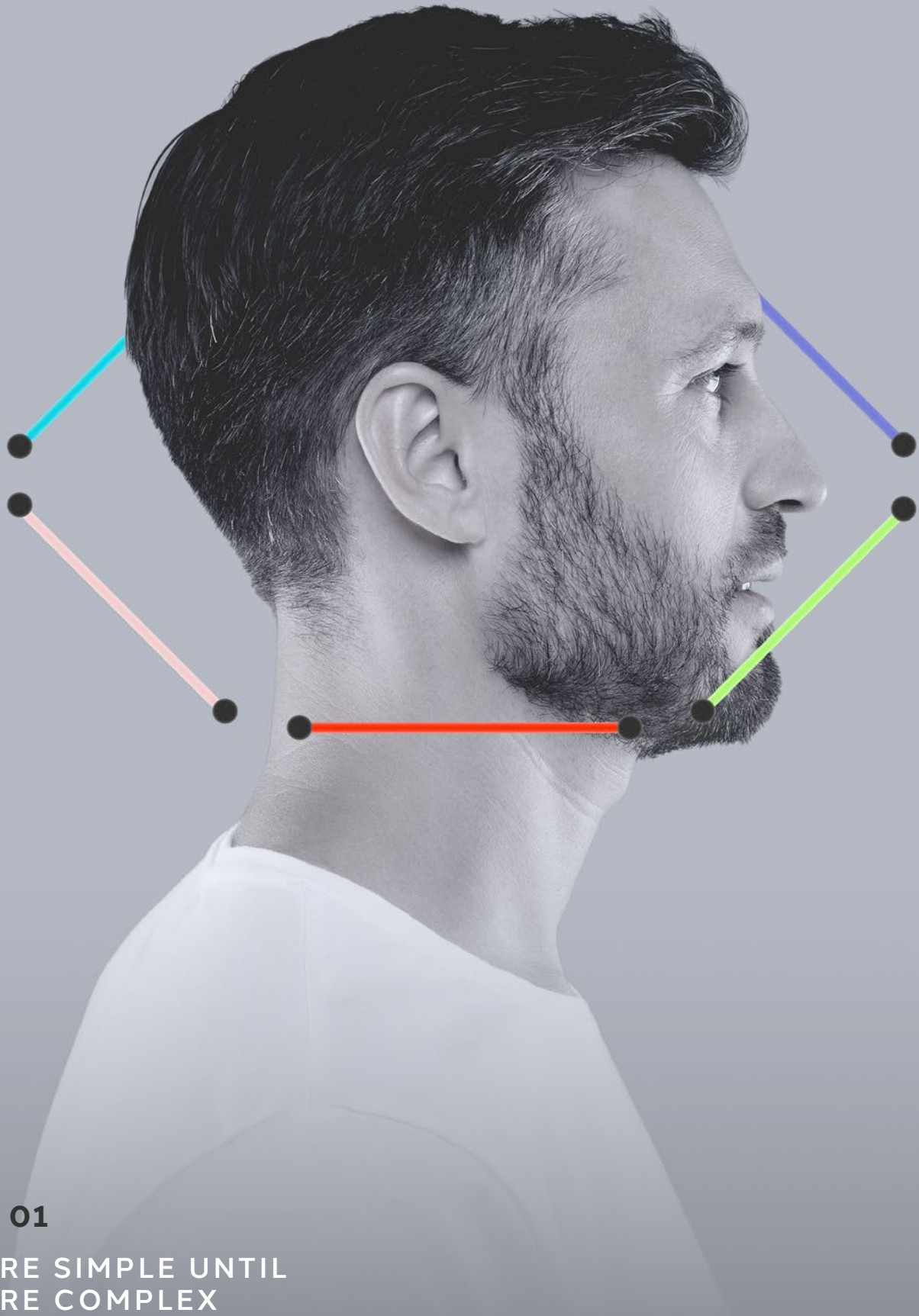
WHAT'S NEXT?

Search's form factor is poised for dramatic change. Visual and voice search will overcome lingering limitations thanks to AI advancements. Innovation in web browsers is making a comeback (e.g., Perplexity's Comet³) and could create new default search preferences. Entirely new interfaces are also on the horizon, with platforms like OpenAI developing next-generation devices.⁴



TREND 2

DIGITAL DELEGATION
TURNS HEADS

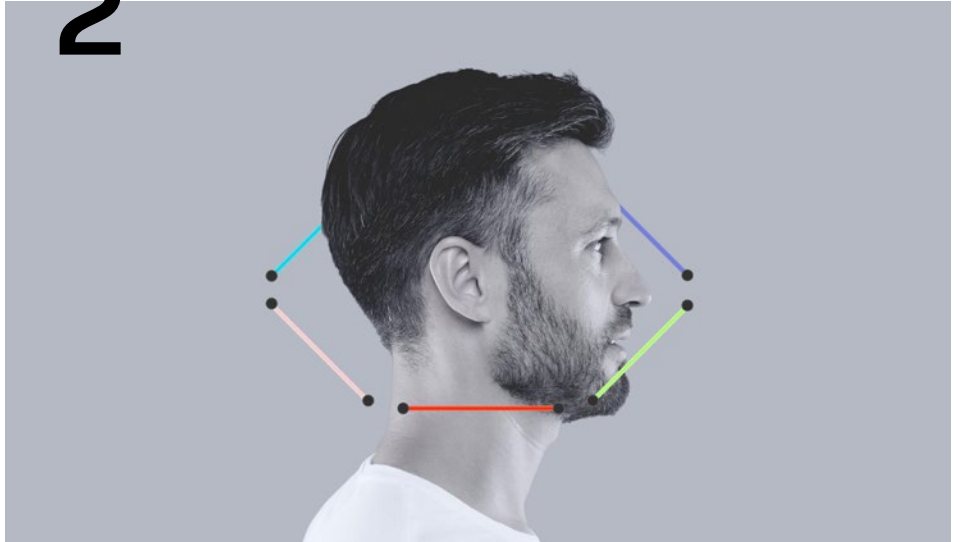


PART 01

WE ARE SIMPLE UNTIL
WE ARE COMPLEX

TREND 2

DIGITAL DELEGATION TURNS HEADS



Agentic AI has become the new darling of boardrooms, fueling rapid agent inflation with no signs of slowing down in 2026. But as more companies rush into the agentic AI arms race without a clear plan, they risk not only building inefficient solutions but, even worse, they risk eroding consumer trust in their brand.

For many consumers, the promise of unprecedented convenience offered by agentic AI is highly appealing. In fact, one in two respondents in the dentsu Consumer Vision study already state that by 2035, they would like to have an AI clone to handle shopping, administrative, and communication tasks on their behalf.⁵

Recent developments in agentic AI, spearheaded by initiatives like OpenAI Agent mode⁶ and Amazon's Buy for Me⁷ feature, are bringing us closer to this future of digital delegation. In response to the technology giants' charm offensive, many companies are rushing to build agents of their own. However, they often mistake simply having a large number of agents for the actual value of those agents.

While experimentation has its merits, releasing agents just for the sake of doing so can turn early consumer curiosity into frustrating experiences, damaging brand trust and ultimately setting companies back in their attempt to take the lead in the agentic AI race.

Agentic AI systems feature enhanced autonomy, allowing them to make decisions, plan actions, and carry out tasks independently, with minimal human involvement.

A STRATEGIC BLUEPRINT FOR AGENTIC AI

As 80% of CMOs report that generative AI is either a priority or significantly important investment for their company,⁸ a clear framework for agent design has become essential.

Build Agents that drive strategic value. Most AI agents lack memory and strategic design, making them ineffective for optimizing consumer journeys. True value comes from context-aware systems that can support multi-step tasks without disconnection and can adapt to shifting customer data.

Build in oversight to avoid technical debt. Unstructured agent deployment without a centralized orchestration layer leads to complexity and operational debt. Brands must equip themselves with a control panel to manage agent lifecycles, dependencies, and communication to drive scalable, efficient, and resilient agent ecosystems.

Build in governance to avoid risk. Agent platforms (e.g., marketplaces) are promising, but, without governance, they pose brand risks. It is critical to build auditable, testable agents with oversight, quality assurance pipelines with human review, and compliance safeguards to prevent copyright violations, off-brand messaging and false claims.

Build for modularity. Framework-specific agents lack the flexibility needed for the ever changing AI landscape. Companies should establish clear internal processes and design modular, swappable agents decoupled from underlying LLMs to perform without the need for a new stack every time circumstances evolve.

PERSONALIZED AGENTIC WORKFLOWS

dentsu.AI agents are optimized to leverage specific data, partner platforms, and best practices to ensure outputs are relevant, compliant, and brand aligned.

Learn more here



In the AI race, brands that design intelligent, well integrated agents with the same rigor applied to campaign orchestration will stand out, delivering a new level of service that delights consumers.

WHAT'S NEXT?

Agentic AI not only raises questions about whether and how brands should develop agents, it also requires them to establish clear rules of engagement for third-party agents on their digital properties. For example, Shopify has already introduced a Robot & Agent policy, which states that “any end-to-end flow that completes payment without a final human review is not permitted.”⁹



TREND 3

THE FRICTION
PARADOX DEFINES
COMMERCE



PART 01

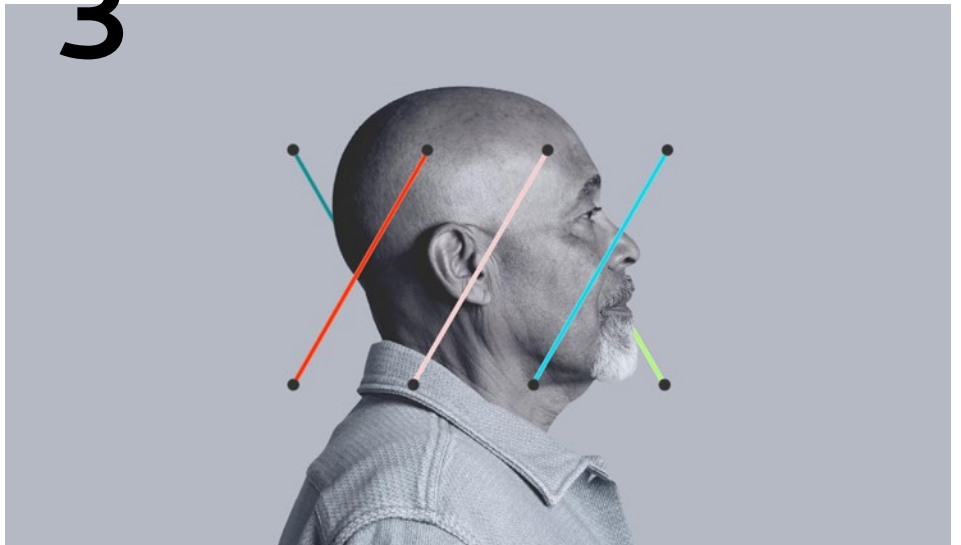
WE ARE SIMPLE UNTIL
WE ARE COMPLEX

HUMAN TRUTHS IN THE ALGORITHMIC ERA

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TREND 3

THE FRICTION PARADOX DEFINES COMMERCE



In 2026, brands must find the right balance of friction to craft the optimal shopper experience, removing as many barriers to purchase as possible, while intentionally leaving, or even adding, just enough friction to fuel the thrill of the chase.

THE QUEST FOR FRICTIONLESS SHOPPING

As platforms continue to shrink the journey from inspiration to transaction, they relentlessly work to eliminate friction. Each week seems to bring new innovations in the name of convenience.

Amazon recently introduced Lens Live, allowing shoppers to use their smartphones to instantly scan products, get realtime matches, and add items directly to their carts or wish lists.¹⁰ The retail giant also announced that Prime members in the United States can now shop perishable groceries including produce, dairy and meat alongside Amazon's same-day selection, with plans to expand to 2,300 cities by the end of 2025.¹¹

Online checkout may also soon look very different as generative AI continues to make its way into commerce. Perplexity users can already complete purchases instantly

using PayPal or Venmo when shopping for products, booking travel or buying tickets.¹² Similar partnerships between payment providers and generative AI platforms are likely to emerge in 2026.

From improved discoverability to easier checkout to faster deliveries, the removal of friction at every stage of the shopping journey adds up to a significantly more convenient experience for consumers. It also raises the bar for brands, which must consider how to eliminate pain points along the path to purchase as well.

HARD-TO-GET PIQUES INTEREST

Not all friction is detrimental to the customer experience. In fact, many brands across diverse industries are leveraging friction as a competitive advantage.

In fashion, appointment-only shopping and drop strategies are used to create a more personal or exclusive shopping experience. For example, Knitwrth, a producer of small-batch woolen items, announces the release dates of its collections weeks in advance.¹³ These items typically sell out quickly, even with a strict no return, no exchange and no refund policy.¹⁴

The retailer Trader Joe's offers no online shopping, no curbside pickup, and no delivery service (including through third-party platforms like Instacart).¹⁵ This deliberate, uncompromising approach requires customers to shop in store, where they can engage with staff and discover new products firsthand. It is precisely this experience that makes Trader Joe's brand distinctive and highly sought after, so much so that, in 2025, its tote bag has become a

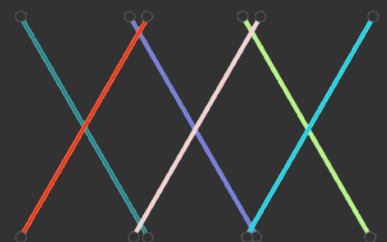
must-have accessory in cities like London¹⁶ despite the brand having no presence there.

Apos, a retailer specializing in audio gear, lists products that have not yet been manufactured, available for pre-purchase through group buys. This approach gives shoppers a sense of anticipation and participation to something innovative and rare.¹⁷

Deliberate, additive friction can foster a sense of exclusivity, community and achievement. As marketers seek to enhance brand experiences, they should not only focus on removing friction but also explore opportunities to use it constructively. Thoughtfully applied friction can enrich shopping rituals or spark moments of serendipity that go beyond algorithmic recommendations.

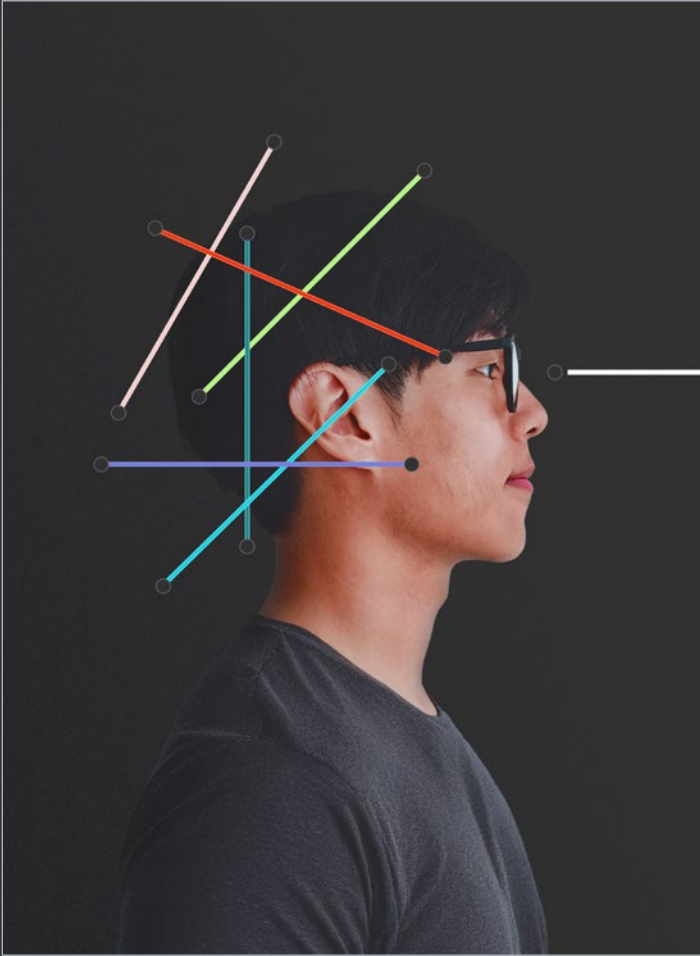
WHAT'S NEXT?

Brands will increasingly adapt their strategies to take advantage of the friction paradox, including an always-on strategy in key digital and in-store channels to increase sales, while adding an element of fun and fear-of-missing-out for products with the highest interest and fandoms.



CONSIDERATIONS FOR BRANDS

PART 01
WE ARE SIMPLE UNTIL
WE ARE COMPLEX



In 2026, brands will have many opportunities to delight consumers and simplify their lives through search, agents, and commerce, providing marketers hold key considerations in mind.

THE NEED FOR A TOTAL SEARCH STRATEGY

To thrive in the Algorithmic Era, brands must evolve how they define search from discovery to discovery plus action. Embrace opportunities offered by AI-powered search and LLMs to maximize visibility, tap into emerging search behaviors across social and retail platforms to optimize discoverability, and use data as a differentiator to enhance the algorithms driving your search campaigns.

MORE AGENTS ≠ MORE INTELLIGENCE

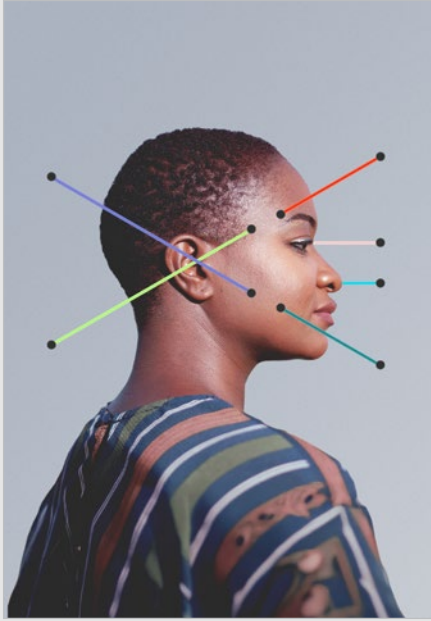
Agentic AI is becoming ubiquitous and holds real promise to transform how consumers interact with brands. Rather than getting caught in a race to scale, focus on building modular, context-aware and business-aligned agents that evolve alongside your strategy. User value, human oversight and strong governance should guide your efforts in the space.

FRICTION MUST BE INTENTIONAL

Marketers need to understand how to navigate the paradox of friction, using it strategically to build consumer desire for products without creating frustration with brands. Identify the technologies and platforms that simplify shopping when ease is essential, but also recognize which audiences and which moments benefit from a touch of intentional friction.

WE ARE SOCIAL ANIMALS





Gathering to celebrate, cry, gossip, laugh or resist has always been part of our human nature.

In recent years, a growing body of literature has explored the rise of loneliness in the digital age. Yet, people's strong desire to connect and socialize remains strong with nearly 50% of American adults saying they regularly spend time with friends.¹⁸

All around us, community-driven environments are thriving. Third spaces, physical or virtual, are in high demand.¹⁹ Reddit threads have become go-to destinations for honest product reviews. Meanwhile, new, unaffiliated figures of influence challenge media behemoths (e.g.,

Substack.com recently surpassed *The Wall Street Journal* in traffic for the first time).²⁰

In 2026, brands that bring the right value and strike the right tone to support environments where people come together stand to win big, as 83% of consumers agree that brands should facilitate connections between people, not just between people and products.²¹



TREND 4

COMMUNITIES SHAPE THE NARRATIVE

With influence becoming decentralized, brands must reconsider how to contribute to the spaces they enter, not only by working with creators but by becoming creators themselves.



TREND 5

SHARED MEMORIES HIT DIFFERENT

From seizing the live content opportunity on streaming platforms to surfing the wave of Millennial nostalgia, brands could win big by betting on shared memories.



TREND 6

BUSINESS MESSAGING TAKES OFF

As monetization finally catches up with user adoption, messaging platforms are poised to become a channel of choice for growth.

TREND 4

COMMUNITIES SHAPE
THE NARRATIVE



PART 02

WE ARE
SOCIAL ANIMALS

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS / dentsu

TREND 4

COMMUNITIES SHAPE THE NARRATIVE



Even before there were brands and advertising, there were communities and word of mouth. Because relatable peers and familiar faces are critical beacons in times of uncertainty, brands must find their place within the right communities to remain culturally relevant in 2026.

REFRAMING BRANDS' ROLE IN SOCIAL SPACES

In today's Algorithmic Era, feeds are optimized by the shares, saves and likes of the content that connects most with people. To make an impact in this highly competitive landscape, brands like Unilever have pledged to spend 50% of their budget on social channels,²² and retailers like CVS now partner with platforms like Reddit to let brands use shopper data across communities.²³ Yet, brands must tread carefully to build genuine credibility and connection with audiences.

For example, people increasingly turn to video reviews from real users rather than polished ads or perfect product demos. This trend explains TikTok's rise as a search destination for user-generated content, and why promotional content from creators can hold attention longer and drive greater uplift in consideration than brand ads.²⁴

DENTSU CREATOR & TRENDS STUDIO

Developed in partnership with Meta and Google, dentsu Creator & Trends Studio is an intelligence, automation, and activation platform.

Featuring AI-powered trajectory modeling, audience and collaboration recommendations, brand suitability analysis, automated workflow management and reporting, dentsu Creator & Trends Studio provides insight into trending influencers, creators, topics, and content.

Reach out to your dentsu representative to learn more.

As such, brands cannot simply elbow their ways into communities by blasting ads. Neither should they aim to keep absolute control over what is said about them. No one understands a follower base better than creators themselves, so marketers should focus on the value their brands bring to audiences' passions, rituals, and identities, and let creators take the lead in delivering this value to communities.

IMPACT OVER REACH

Influencers serve as trusted voices across communities, from mainstream to niche interest groups. As different demographic cohorts engage with different types of creators, brands must avoid assuming that the follower count determines campaign success.

For example, Gen Z are more likely to engage with mega-influencers (1M-10M followers), while Gen X tend to favor nano-influencers (1k-10k followers). Overall, twice as many people engage most often with influencers under 1M followers than people engaging most often with mega-influencers.²⁵

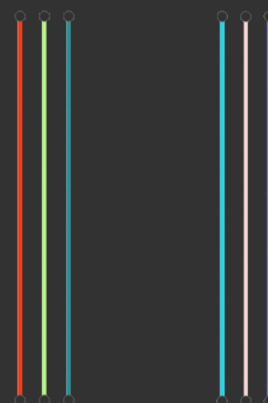
Investing in a diverse group of smaller creators with authentic ties to the brand can bring alternative ways to build advocacy cost effectively, rather than relying on one big name with less genuine connections.

Most consumers also follow influencers across multiple platforms, and people discover new creators in different places: Gen Z significantly over-index on using Twitch, Apple Music, and Discord, whereas Boomers favor LinkedIn and Facebook.²⁶ This means brands should broaden their scope of creator strategy, from passion-based platforms like Substack and Roblox to how they show up on YouTube on television.

Moreover, brands are increasingly recognizing that creators lead full lives. A creator known for car-related content is not only interested, interesting and influential around cars. That creator also eats, wears clothes, goes on vacation, and so on. Leveraging a creator's expanded profile, brands have greater opportunities to be relevant and meaningful to the right communities.

WHAT'S NEXT?

As content creators and communities take a leading role within media strategies, more sophisticated measurement capabilities will emerge to evaluate the full extent of their contributions to business growth (e.g., impact on retail, footfall and attention) allowing brands more creative planning and more accountability.



TREND 5

SHARED MEMORIES
HIT DIFFERENT



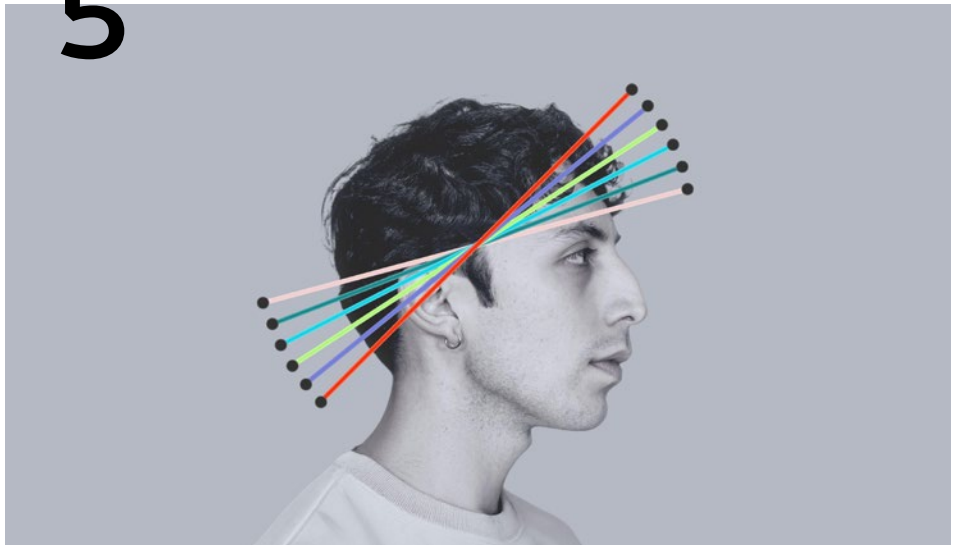
PART 02

**WE ARE
SOCIAL ANIMALS**

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS / dentsu

TREND 5

SHARED
MEMORIES HIT
DIFFERENT

Experiences resonate more deeply when they are shared. Whether it is creating new collective memories or rekindling old ones, brands that bet on moments of togetherness are poised to dominate conversations and leave a lasting impression in 2026.

LIVE EXPERIENCES
FORGE MEMORIES

Streaming continues to reach new viewing time milestones year after year,²⁷ and the tipping point at which it permanently overtakes broadcast and cable television is fast approaching. However, no matter how much audiences appreciate the convenience of on-demand viewing, the magic of live experiences remains unmatched in forging lasting shared memories and sparking cultural conversations.

Streaming platforms are well aware of the magnetic pull of live programming. Now that technology enables seamless viewing, live content has become a strategic pillar for audience growth and retention.

Some streamers are acquiring rights to major sports events (e.g., Apple is reportedly bidding for Formula 1 rights in the United States²⁸) and striking deals with broadcasters to feature live channels directly on their platforms (e.g., TF1, the leading television channel in France, will soon be accessible on Netflix²⁹). Others

are developing successful original live programming (e.g., *Raw*, a weekly WWE show, has ranked in Netflix's global top 10 every week in 2025³⁰).

Meanwhile, platforms already specialized in live content continue to innovate, enhancing the fan experience through interactive social features. For example, DAZN's *Fanzone* allowed FIFA Club World Cup viewers to play quizzes, vote, win prizes, and watch alongside other fans around the world.³¹

From sponsorship to advertising to content integration, these familiar yet reimagined live moments will offer countless opportunities for marketers to reinvent brand-building engagement for audiences who have moved away from broadcast television.

THE NOSTALGIA MOMENT

Oasis is on tour. *Buffy the Vampire Slayer* is on television. The sequel to *The Devil Wears Prada* is playing in theaters. Yet, the year is not 1996, nor 2006, but very much 2026.

We appear to be in a Millennial renaissance, one that not only revives cozy memories and shared cultural references for an entire generation that came of age in the '90s and 2000s, but also intrigues Gen Z, who romanticize a time they did not experience firsthand.

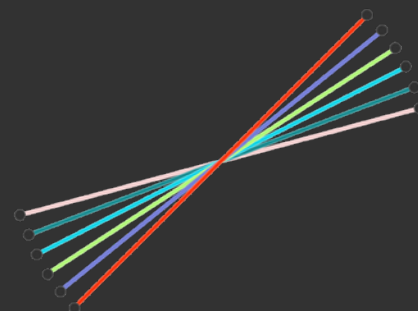
Many brands are tapping into nostalgia to reclaim a piece of fame by reintroducing beloved products or

riding the wave of cultural reboots. For example, in 2025, Subway celebrated the release of *Happy Gilmore 2*, the sequel to the 1996 hit, through in-movie brand integration and a limited time Happy Gilmore Meal.³² McDonald's also brought back the Snack Wrap,³³ a discontinued fan favorite originally launched in 2006, with the help of Hassan Johnson,³⁴ best known for his role in the Millennial cult series *The Wire* (2002-2008).

Whether by relaunching a product as a limited series, revitalizing a defunct brand, or simply borrowing aesthetics from the past, brands that can credibly tap into old-school cool are poised to spark renewed interest among younger generations.

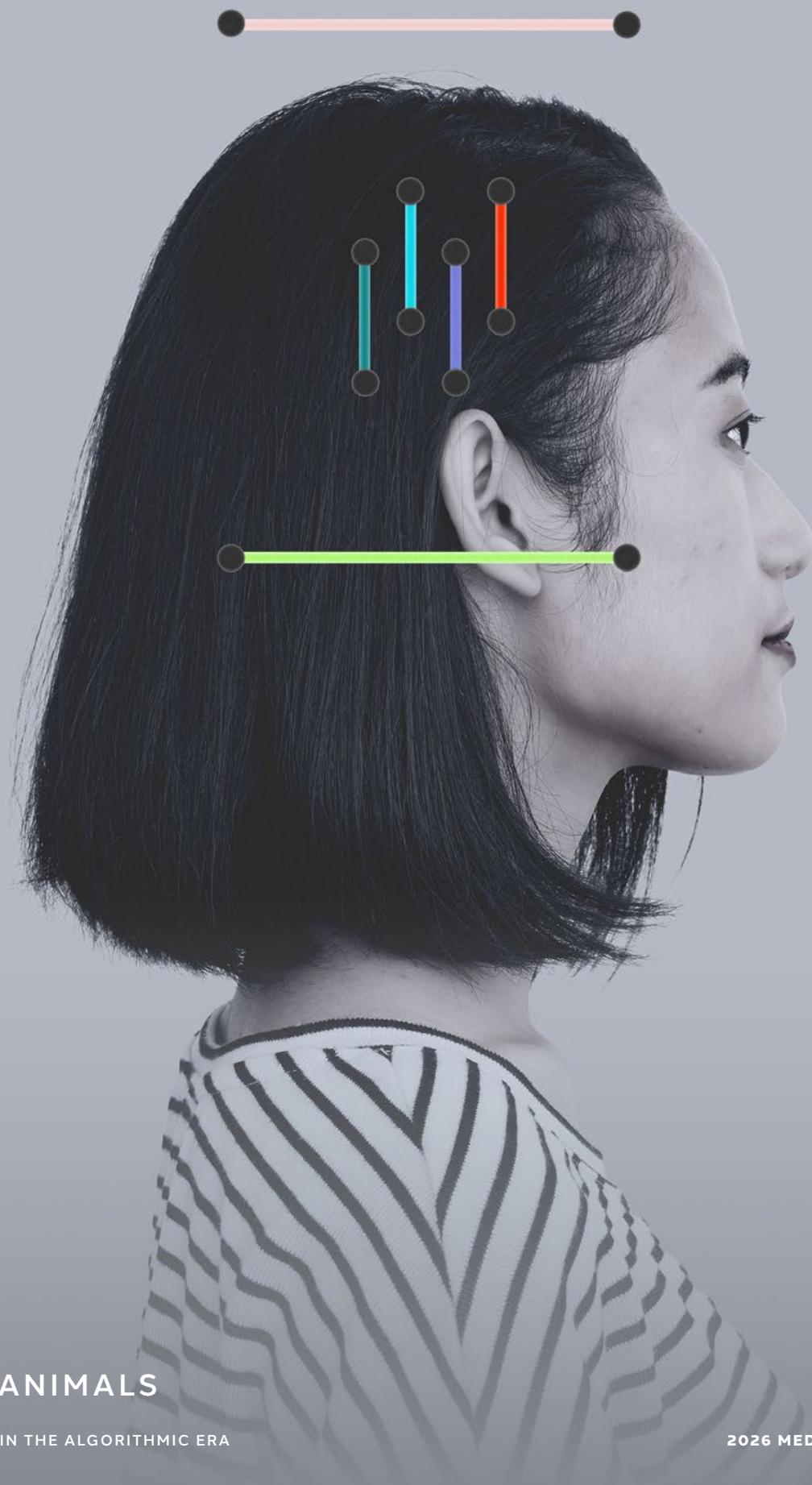
WHAT'S NEXT?

Nothing forges powerful memories like collective, in-person experiences. In the near future, we may see more online-only brands venture into the physical world, not as stores but as experiential venues, such as the Netflix Houses in Dallas and Philadelphia.³⁵



TREND 6

BUSINESS
MESSAGING
TAKES OFF



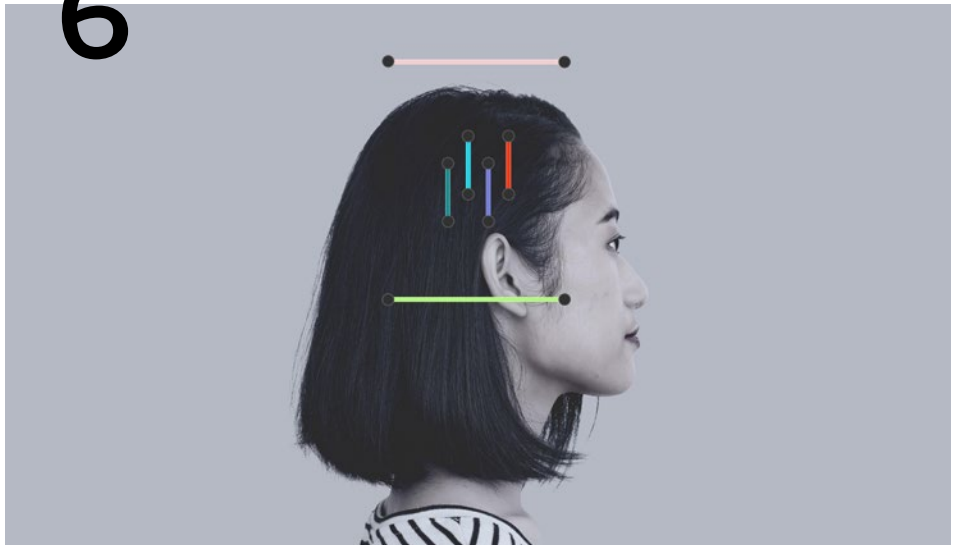
PART 02

WE ARE
SOCIAL ANIMALS

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS / dentsu

TREND 6

BUSINESS
MESSAGING
TAKES OFF

Audiences increasingly expect brands to engage with them on their terms, through responsive and relevant communications on their preferred platforms. In 2026, brands that adopt business messaging as part of their communications strategy will unlock a new path to growth.

THE BUSINESS
MESSAGING MOMENT

For many of us, messaging applications have become the epicenter of our social lives and of our conversations with friends, families, and colleagues. Today, the three largest messaging apps in the world, WhatsApp,³⁶ WeChat/Weixin,³⁷ and Messenger,³⁸ have all surpassed the one billion monthly average user milestone. It has also been reported that, on average, users reportedly open WhatsApp 891 times a month vs. 359 times for TikTok (the next most used social app).³⁹

Until recently, brand presence on messaging platforms has been limited in major markets like Europe or the United States, as these apps were cautious not to alienate the audiences they built over the years and become riddled with spam. But a new wave of monetization is underway. In recent months, new advertising placements have emerged across platforms like TikTok (Messaging Ads⁴⁰), Discord

(Video Quests now available on mobile⁴¹), and WhatsApp (Ads in Status⁴²).

Yet, advertising is only the tip of the iceberg.

A NEW WORLD OF
OPPORTUNITIES

By unifying content typically dispersed across multiple channels (e.g., apps, websites, emails) into a single, persistent conversation, business messaging enables brands to deliver truly integrated experiences encompassing media, commerce, and customer experience management (CXM).

The flexibility to include many formats (e.g., product carousels) and to move from automated messages to human-led interactions as needed makes messaging a versatile option suitable for a wide array of objectives.

DENTSU WHATSAPP BUSINESS GATEWAY

Dentsu is the only global agency network with direct access to the WhatsApp Business Cloud API.

The dentsu WhatsApp Business Gateway helps brands embrace the new era of customer conversations quickly and cost effectively, connecting the user across common touchpoints from media to experience, commerce and service through a fully managed solution.

Scan or click the QR code to learn more:



For example, brands can use instore QR codes driving to their messaging channel to connect earlier in the buying journey and address common barriers, use product finder and influencer content to drive conversions, or provide *how to* help and exclusive offers to delight post purchase.

In the United Kingdom, Sherwin-Williams Valspar launched Valspar Colour Consult,⁴³ a service accessible via a click-to-WhatsApp link on their website or a QR code instore. After a series of automated questions, a live agent uses the dentsu WhatsApp Gateway to chat with customers about their project in real time, offering expert advice and mood boards. Eighty percent of users complete the journey end-to-end, demonstrating both the interest and convenience of this kind of pre-purchase customer service.

For brands, developing an effective business messaging channel requires increased collaboration and education within the organization. As messaging cuts across departments, misalignment can lead to confusion around priorities, sourcing budgets,

and building the workflows that will support a seamless experience for the audiences. Clear, shared rules of engagement are also essential to manage customer expectations and maintain credibility.

WHAT'S NEXT?

In the Western world, messaging apps have long looked with envy at the wide array of features of Eastern super apps. By dramatically elevating the breadth of services available to users, business messaging and agentic AI could make messaging apps even more central to people's lives, ultimately taking them closer to super apps status.



CONSIDERATIONS FOR BRANDS

PART 02 WE ARE SOCIAL ANIMALS



Whether brands aim to support communities, shape collective memories or establish a thoughtful presence in messaging apps in 2026, the following considerations can help them achieve their goals.

INFLUENCE BEGINS WITH COMMUNITIES

AI is increasingly dominating our feeds and the importance of communities is rising in response. Pay attention to what communities are saying about you and examine how you currently show up in the spaces where they gather, even when you do not own those environments. Whether you are invited to participate or not, it is critical to understand the full picture.

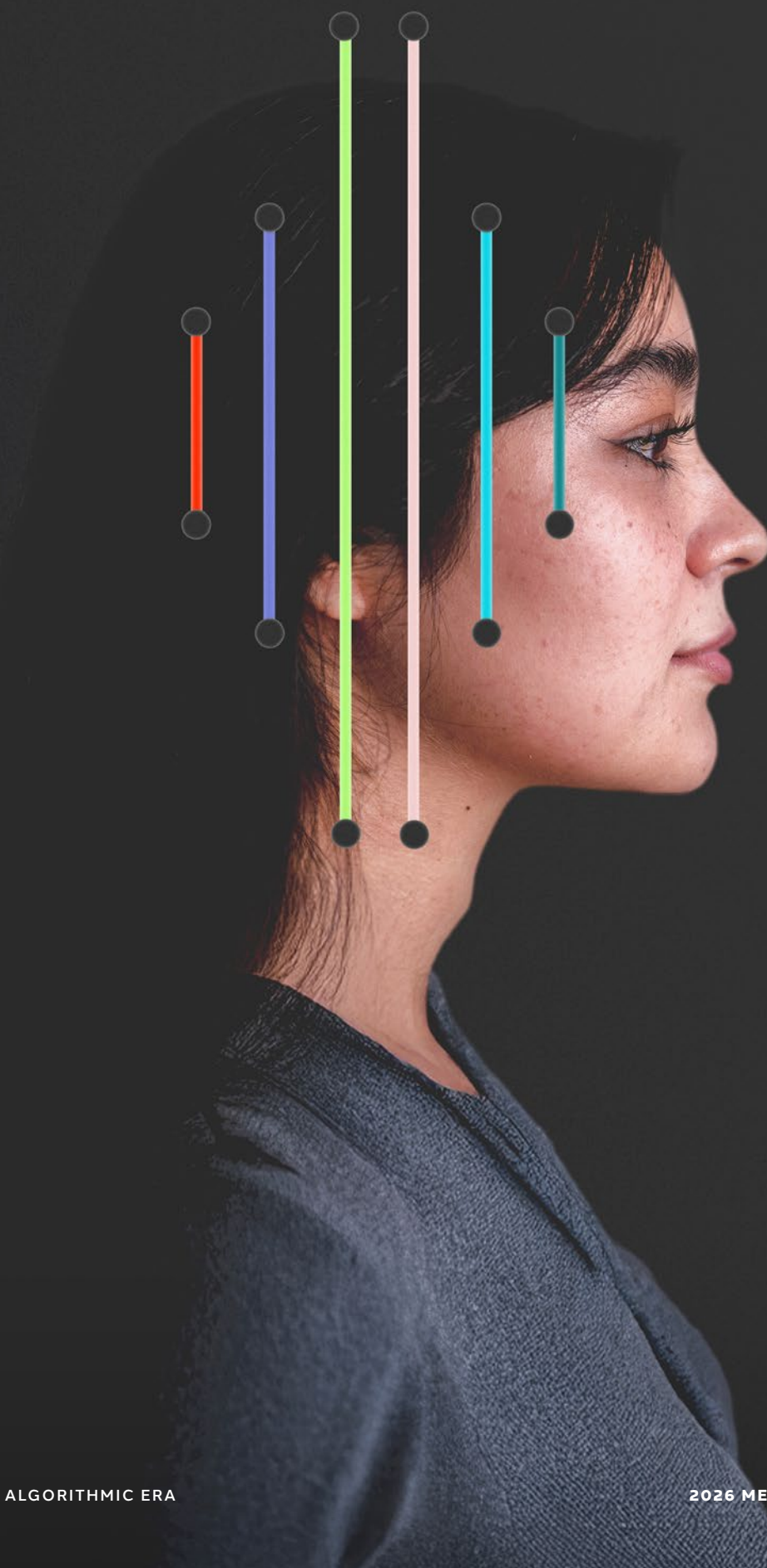
COLLECTIVE EXPERIENCES CREATE STRONG MEMORIES

The craving for powerful live experiences and Millennial throwbacks shows no signs of fatigue. Capitalize on the new live opportunities unlocked by streaming platforms to become part of shared memories as they unfold. Revisit your brand heritage to identify occasions that can reignite fond memories and resonate with new audiences.

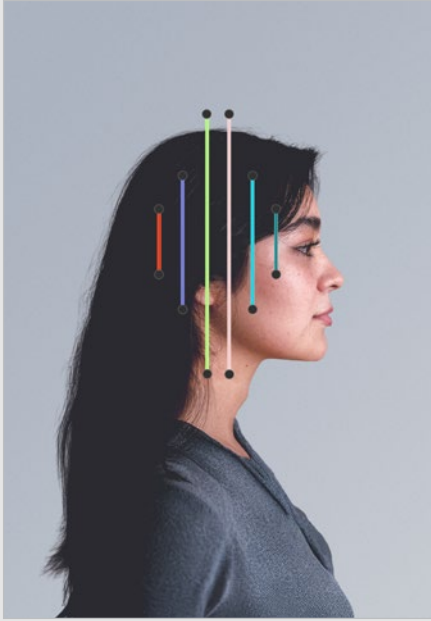
BRAND MESSAGING SUPERCHARGES ENGAGEMENT

Brands that want to get the most out of their messaging should bring together media, digital properties and CRM. They must integrate, enrich and activate data across organizational silos, aligning around shared customer outcomes. Start small and expand quickly. Build use cases around customer expectations and test targeted audience groups to grow engagement and refine the overall experience.

WE DON'T READ ADVERTISING



WE DON'T READ ADVERTISING



“Nobody reads advertising, people read what interests them; and sometimes it’s an ad.”

—Howard Luck Gossage (1917-1969)

People are drawn to what entertains them, and to capture their attention brands are expected to be entertaining. This was true in the *Mad Men* era. It has been true in the digital age as well, with attitudes toward the question *I expect advertising to be entertaining* remaining steady according to dentsu CCS data.⁴⁴

Yet, with exploding screen time, doomscrolling, and AI slop, audience attention in the Algorithmic Era is

under siege like never before. In this context, advertisers are collectively spending more to reach audiences.⁴⁵

But ad nauseam advertising is not a winning strategy. It is a lose-lose spiral for both audiences and brands.

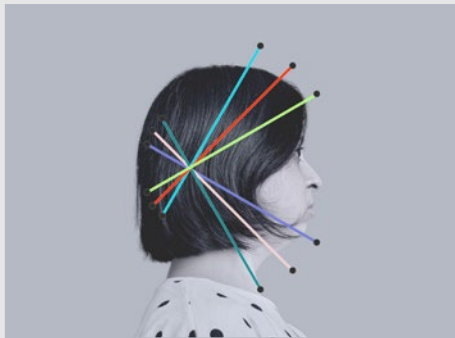
The upside? In 2026, brands that play the quality game, not the saturation game, will find more opportunities to cut through the noise. There will be more occasions for brands to understand people through improved signal quality, unprecedented ways to measure audience attention, and exciting opportunities to tap into the entertainment playbook.



TREND 7

AI-GENERATED AUDIENCES UNLOCK CONSUMER INSIGHT

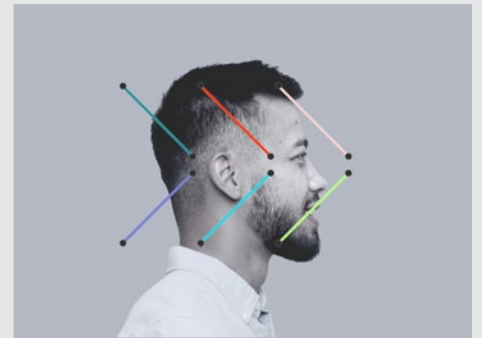
AI-generated consumer profiles transform data and research into actionable insights and outcomes, enabling marketers to build more relevant campaigns that get noticed.



TREND 8

ATTENTION GETS A LONGER-TERM LOOK

Solutions to better measure the impact of video on long-term sales are emerging to help marketers rebalance their brand-performance equation.



TREND 9

ENTERTAINMENT OPENS NEW BRAND AVENUES

From sports to anime to microdramas, new opportunities are blooming for brands to engage audiences through entertainment in more meaningful ways.

TREND 7

AI-GENERATED
AUDIENCES UNLOCK
CONSUMER INSIGHT



PART 03

WE DON'T READ
ADVERTISING

TREND 7

AI-GENERATED AUDIENCES UNLOCK CONSUMER INSIGHT



Capturing people's attention starts with developing a deep understanding of their full, nuanced selves. In 2026, AI-generated audiences will empower brands to move beyond the limitations of traditional data strategies to be more relevant to consumers.

AUDIENCE STRATEGY IS AT A CROSSROADS

In the Algorithmic Era, legacy methods for generating audience insights and targeting consumers no longer deliver on their own the scale, accuracy, and adaptability required to win.

- Consumer panels, while offering robust insights, can be expensive, time consuming, and siloed from the rest of the organization, making them difficult to activate in campaigns.
- Deterministic ID-based systems (i.e., using verified customer information like email) are effective for reaching existing customers but show limits for finding new ones. The data they rely on can also be outdated and does not always scale.
- ID agnostic, federated learning systems that use behavioral patterns (e.g., browsing habits) are fast and flexible but lack grounding in a trusted truth set about people. Their dependence on deterministic signals like cookies makes cross-platform activation challenging.

To design and deliver more relevant campaigns, brands must be able orchestrate *culture* signals that surface emotional and timely opportunities for meaningful connections, *commerce* signals that reveal purchase propensity and patterns, and *context* signals that shed light on motivations and habits.

This is where AI-generated audiences offer a transformative path forward.

AI-GENERATED AUDIENCES TRANSFORM MEDIA

AI-generated audiences are consumer profiles that simulate real-world audience attitudes, sentiments, and behaviors. They offer insights for a large array of media use cases.

AI-generated audiences help marketing teams work *smarter*. For instance, they can provide immediate feedback on creative ideas, messages or new product features to create more relevant campaigns. They can also be used in consumer research to simulate hard-to-reach audiences at scale. During media planning,

GROUNDING IN REAL PEOPLE

Built on dentsu's legacy of understanding real people, Generative Audiences, dentsu's AI-generated audience capability, leverages dentsu.Audiences and dentsu.AI to combine the precision and stability of ID-based data with the scale and adaptability of AI-driven signals.

This empowers brands to engage known consumers with accuracy and connect with new audiences as interests shift in real time.

Learn more at:

[insight.dentsu.com/
dentsu-connect/](https://insight.dentsu.com/dentsu-connect/)



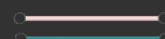
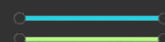
AI-generated audiences help strike the optimal balance between reach and relevance, starting wide and then iterating intelligently to refine precision, rather than relying on broad strokes of traditional audience models.

AI-generated audiences help marketing teams work *sharper*. Teams can chat with personas, creating virtual focus groups in realtime that reduce the resources and cost of research. They can also reduce downstream expenses by preventing the production of suboptimal creative content. Additionally, AI-generated audiences can operate with limited or no data and scale with premium inputs like first-party data. This flexibility makes them particularly valuable for industries with limited access to first-party data such as Consumer Packaged Goods (CPG).

AI-generated audiences help marketing teams work *swifter*, by making insights more accessible, providing faster answers, freeing up time for strategy and creativity, and enabling a rapid feedback loop for more efficient iteration.

WHAT'S NEXT?

AI-generated audiences are poised to unlock a new era of media planning and buying powered by smart audience intelligence and AI. As cross-platform interoperability advances, brands will be able to seamlessly match and activate audiences across scaled ecosystems, making the most of walled gardens without the need for personal identifiers.



TREND 8

ATTENTION GETS A
LONGER-TERM LOOK



PART 03

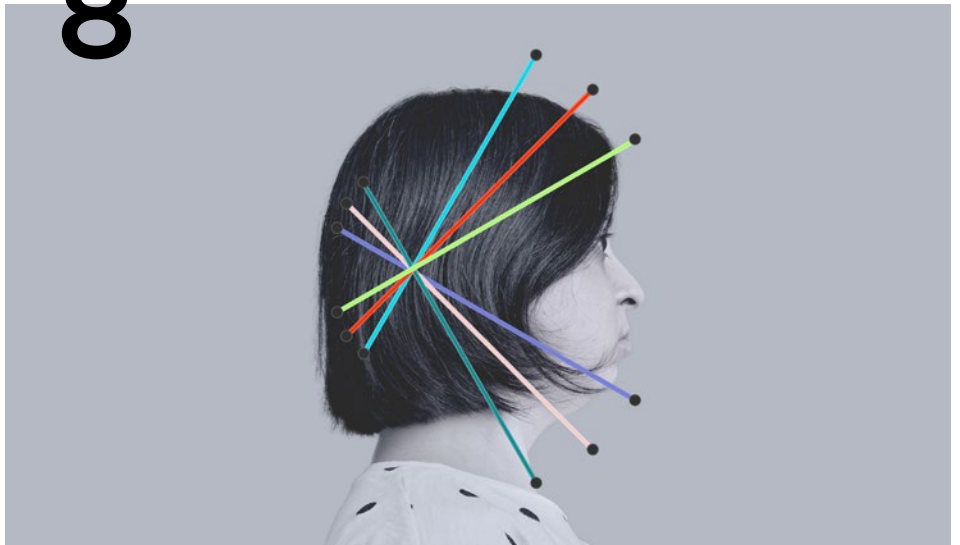
**WE DON'T READ
ADVERTISING**

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS / dentsu

TREND 8

ATTENTION GETS A LONGER-TERM LOOK



To create standout campaigns that build equity, brands need a deep understanding of what truly influences audience mindsets and behaviors in the long run. In 2026, marketers will be able to leverage groundbreaking research on attention to gain a competitive edge.

Over the past decade, significant progress has been made in understanding the levers of attention and their role in driving short-term effectiveness throughout various environments, from audio⁴⁶ to influencers⁴⁷ to gaming.⁴⁸

Yet, after years of heavily leaning toward performance tactics and immediate ROI, often at the expense of brand health, many companies are now working to rebalance their performance and brand investments. As they undertake their brand reset, they need intelligence that goes beyond short-term advertising strength (STAS) and considers attention through a longer-term lens.

In the Algorithmic Era, the emergence of new channels, formats and data signals presents a fresh opportunity for marketers to reassess how people engage with ads, and how exposure to those ads builds lasting sales and memories.

THE *BRAND RESET* IN NUMBERS

With ten NextGen video platforms, three research partners, and 40,000 people studied across the United Kingdom and the United States, Carat's *Brand Reset* research is the world's largest attention study on video's long-term brand and sales impact.

Sign up to receive the research through this code:



NEXTGEN VIDEO BUILDS BRANDS

Video has long been a powerful medium for capturing hearts and minds.

But as algorithms increasingly shape viewing preferences and dominate screen time, can NextGen video platforms build brands and drive sustained sales? And how do they compare to broadcast television, a proven, trusted medium for brand building?

This is what *Brand Reset*, a new attention based large-scale study by Carat spanning the leading video platforms benchmarked against television, explores.

The research confirms that all NextGen video platforms and formats build brand equity and boost long-term sales. This is a valuable piece of empirical evidence for scenario planning and media investment decisions.

The study also demonstrates that the video playing field is leveling, with connected television (CTV) delivering outcomes comparable to broadcast television. A single CTV exposure now typically lifts long-term sales by 3.16% (over three years), close to the uplift from broadcast television (3.61%). Some CTV video platforms even surpass the impact of broadcast television, further cementing the growing importance of streaming.

The lasting effects of NextGen video are not limited to the big screen. The *Brand Reset* study reveals that small moments have a big impact, too. A single short-form video exposure in fast scroll environments (e.g., a vertical skippable video), can, with the right level of attention, lift brand sales by 6.62% over three years.

These insights are just a glimpse into the wealth of findings that the *Brand Reset* research uncovers about the impact of NextGen video formats and platforms to help brands make more informed media decisions and ultimately bring to life campaigns that truly capture attention.

WHAT'S NEXT?

The *Brand Reset* baseline single exposure data will be contextualized with reach, frequency, and cost. The impact of the platforms' algorithms on this baseline will also be incorporated to better understand attention in the Algorithmic Era. Beginning in 2026, *Brand Reset* data will be available through dentsu.Connect, dentsu's integrated end-to-end platform that connects applications across the entire media workflow, to inform the video decisions of brands aiming to make a lasting impact on audiences and sales.



TREND 9

ENTERTAINMENT
OPENS NEW
BRAND AVENUES



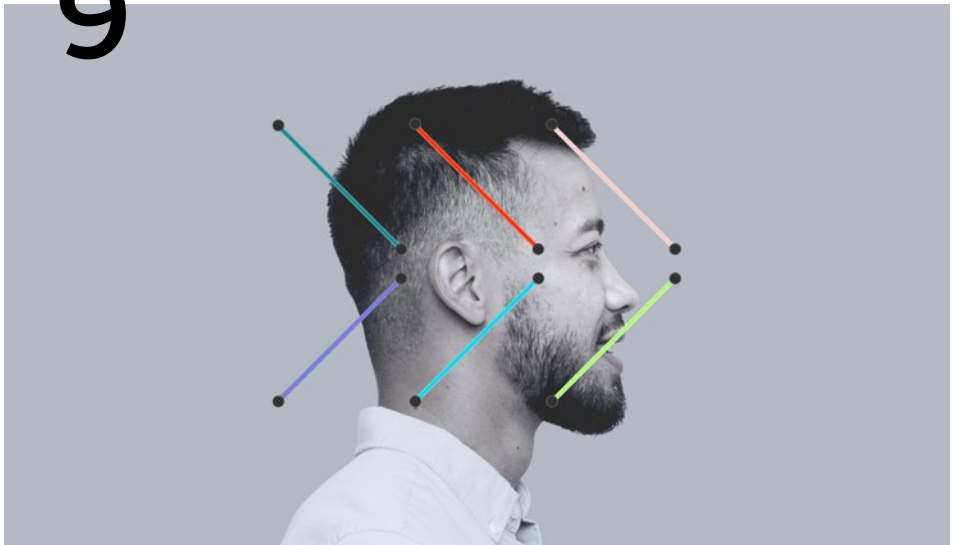
PART 03

WE DON'T READ
ADVERTISING

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS / dentsu

TREND 9

ENTERTAINMENT
OPENS NEW
BRAND AVENUES

When it comes to commanding attention, the entertainment industry reigns supreme. In 2026, rather than competing for the same mind space, brands must seize new opportunities to embed themselves within fast-growing entertainment territories.

SPORTS DOCUSERIES
EXPAND AUDIENCES

With the Olympics and the FIFA World Cup on the horizon, 2026 is set to be a landmark year for sports.

Yet, live action coverage is not the only entry point for brands in the sports realm: 40% of consumers globally watched a sports docuseries in the last month.⁴⁹ These series capture the attention of women, Gen Z, and emerging markets, where traditional sports viewership often lags. They help fans better understand unfamiliar sports and foster personal, emotional bonds with athletes through off-the-field storytelling.

From supporting fan discovery with complementary content (e.g., behind-the-scenes access) to serving as bridges between fans and rising athletes, brands that invest in docuseries can win big with audiences, often at a lower cost than live competition sponsorships. For example, Gillette presented and sponsored *Culture of Winning: Polynesian Football Pride*.⁵⁰ Co-

produced by P&G Studios and dentsu Entertainment, among others, and available on Fox Sports and Tubi, the film spotlights the dominance of Polynesian athletes in football and explores cultural pillars such as faith, family, hard work and mentorship.

CLOSING THE
GAMING GAP

In 2026, the launch of the most anticipated video game of the decade, GTA VI,⁵¹ is expected to further cement gaming as a cornerstone of global culture.

However, despite growing user bases worldwide, gaming still captures less than 5% of global media investment,⁵² as many brands see it as a vertical rather than a horizontal layer that spans content, commerce, and communities.

This leaves a significant white space for brands to claim, if they activate purposefully. By aligning activations to gamers' motivations, brands can maximize their in-game presence,

GO FURTHER

To dive deeper into the upcoming opportunities in the Sports and Entertainment space, download dentsu's latest research today:

Sports Docuseries: Broadening Fandoms & Deepening Connections

Gaming, Your Marketing Cheat Code

Anime: A growing opportunity for brands

from ambient brand placements for relaxation-seeking gamers, to cinematic integrations for immersion-driven gamers, to time-limited rewards for thrill-driven audiences.

Brands can also tap into the massive gaming fandoms through expanding transmedia opportunities. Video games adaptations are surging, with box office hits evolving into well-established series (e.g., *Angry Birds* returning for a third movie in 2027).

EASTERN INFLUENCES REDEFINE SCRIPTED CONTENT

The rise of non-Western formats and genres presents new opportunities in 2026.

Microdramas are a modern reinvention of soap operas in vertical video episodes lasting less than two minutes. Hugely popular in Asia, they are now becoming a

global phenomenon with apps like ReelShort climbing app store charts worldwide.⁵³ Brands like Starbucks⁵⁴ have embraced the format, capturing social media attention with popular elements like time travel, rebirth, sweet romance, and business success.

Japanese anime, once considered niche, is now watched at least weekly by 50% of Gen Z, even in markets traditionally dominated by Hollywood studio entertainment.⁵⁵ In the US, anime is more popular among this demographic than all major sports leagues,⁵⁶ prompting sports giants to tap into this fandom (e.g., Liverpool FC x *Blue Lock*⁵⁷). It is no surprise that leading brands like McDonald's⁵⁸ are increasingly partnering with fan-favorite anime IPs.

WHAT'S NEXT?

By reportedly raising more than \$40 million in sponsorship for a fictional racing team,⁵⁹ Apple's *F1 The Movie* has reached new heights in terms of brand integration in scripted content. Producers are becoming more open to brands getting deeply involved from early stages, not just placing products, but influencing storylines, characters, and scenes, as brands look for credits, IP shares, and co-branded opportunities.



CONSIDERATIONS FOR BRANDS

PART 03 WE DON'T READ ADVERTISING



By leveraging the right signals, exploring new attention solutions, and embedding themselves within relevant entertainment spaces, brands can effectively capture audience attention in 2026. The following considerations can support their strategic planning.

SMARTER, SHARPER, SWIFTER WITH GENERATIVE AUDIENCES

AI-generated audiences can drive smarter media activation, enhance creative relevance, and improve ROI. However, not all AI-generated audiences are created equal. Take the time to understand which datasets are being used, the governance and security measures in place, the level of transparency offered by the provider, and how accessible the solution is for non-specialists.

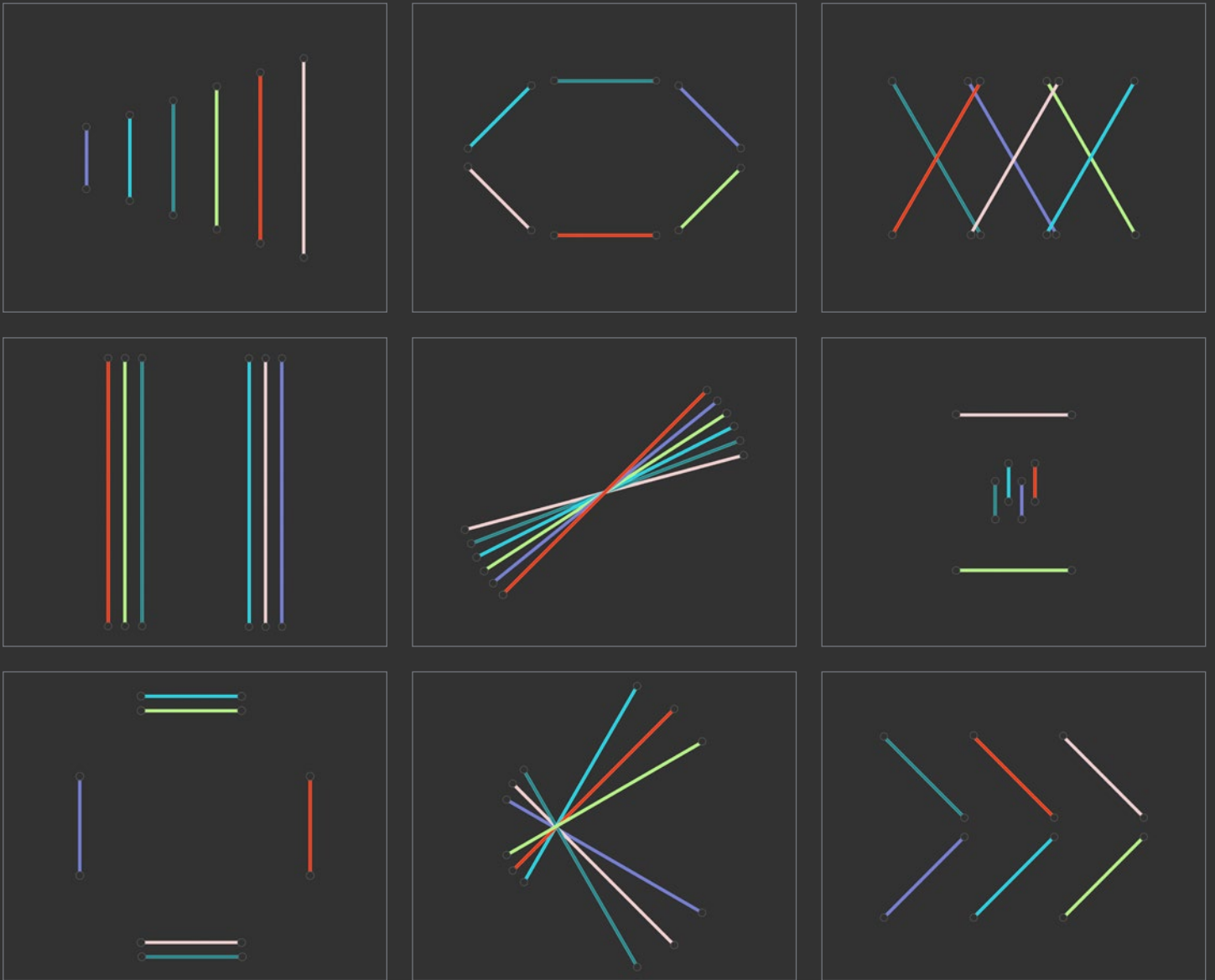
NEXTGEN VIDEO MAKES AN IMPACT

Marketers need to understand what drives attention in the Algorithmic Era. Using research like Carat's *Brand Reset*, take the time to educate yourself about the impact of video platforms and formats on brand equity and long-term sales. Then use that knowledge to improve your use of NextGen video to tunnel through the funnel.

NEW CULTURAL WHITE SPACES OPEN EVERY DAY

Embedding your brand in the right cultural environments can give you a direct path to connecting with audiences. For example, produce a docuseries that spotlights underdog athletes ahead of major sports events, or embrace emerging formats like microdramas as they gain global traction, or tap into influential yet underutilized cultural forces like gaming and anime.

CONCLUSION



In 2026, brands will face a media landscape shaped by uncertainty, algorithms, and evolving cultural dynamics.

Success and growth will hinge on their ability to anchor strategy in the enduring human truths of simplicity, sociability, and attention, while embracing new technologies and formats.

From agentic AI to business messaging, nostalgic reboots to immersive entertainment, the opportunities are vast and media is the bridge between the worlds brands live in and the worlds their audiences live in.

By using media as a flywheel for growth that connects creativity and customer experience, brands can not only adapt, but lead, in the Algorithmic Era.

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INNOVATING TO IMPACT


dentsu

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A woman with dark hair, wearing a light blue ribbed sweater and a small gold earring, is shown in profile, looking upwards and to the right with a slight smile. The background is dark. Several colorful lines (green, blue, purple, orange, pink) extend from the edges of the frame towards the woman's head, each ending in a small circle. One pink line ends in a solid black dot near her shoulder.

HUMAN TRUTHS IN THE ALGORITHMIC ERA

2026 MEDIA TRENDS

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