rain

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MEDIA IMPACT REPORT

2026 Predictions

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A Case for Advancing Reach and Frequency



/BRIEFING ROOM

2026 Predictions

Each year, we ask our subject matter experts to weigh in on what they expect to see in the media landscape in the coming year. Check out their thoughts and hot takes below.



Rachel Baker
SVP, Head of Video Investments & Partnerships

In 2026, linear TV and CTV will continue to converge, while maintaining distinct yet complementary roles within a video campaign. As in prior years, linear TV will remain essential for delivering mass reach—particularly around live programming such as sports and tentpole events. While overall viewership continues to shift toward CTV, linear TV's core value lies in its ability to drive fast, broad-reach awareness at scale. Pricing pressures persist within sports, with earlier sellouts driven by stronger demand. Outside of sports, meaningful efficiencies remain across the linear marketplace.

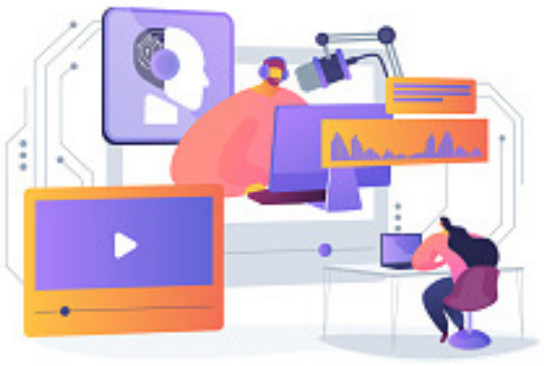
As CTV continues to evolve and mature, it increasingly delivers incremental reach while simultaneously operating as a performance-driven investment across the funnel. Publishers are aggressively investing in sports and AI-powered innovations to compete for advertiser dollars. Platforms and publishers are expanding premium video offerings through high-impact original content and the acquisition of sports rights. When combined with CTV's strengths in data-driven targeting, addressability, and measurable outcomes, its share of total video investment is expected to keep rising in 2026. Additionally, all major streamers operate in hybrid ad-supported models, significantly increasing supply, growing competition, and putting downward pressure on CPMs.

Given these dynamics, planning, buying, and measurement across linear TV and CTV must be approached in a fully converged way. These can no longer be treated as separate channels. The industry's continued push toward cross-platform solutions—designed to unify reach, frequency, and outcomes—underscores this shift and Rain remains at the forefront of the converged video marketplace.



Jeff Beckerman
Head of Production

For 2026, I predict the unpredictable. With brand pricing pressures and the emergence of new technology, nothing is truly predictable. Last year was a resounding success for creative, production, and post-production. However, brands expect more content with tighter budgets. We must think and work smarter. It's not merely about reducing hours; it also involves exploring new approaches. Last year, we successfully created our first LED volume wall spot. While it wasn't easy, it saved our client significant production costs. In 2026, my hope is we can create similar efficiencies.



Predictions for 2026 *(continued)*

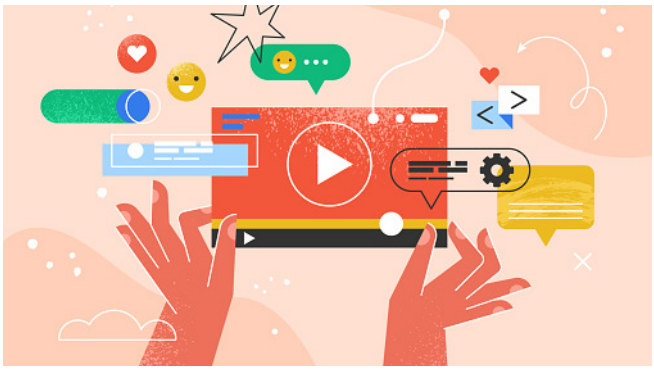
AI won't replace production but will enable us to accomplish some very cool things. It's not at the stage where it can replace actors for conveying emotions, timing, and authenticity. A director can guide the talent to deliver lines with varying inflections or emphasizing specific words. Directors can also assist actors in projecting specific emotions to effectively sell a product and create a sense of authenticity. However, let's consider the potential of AI. Imagine filming a spot with an English-speaking talent. With the assistance of AI, we can have the same actor lip-sync the spot in multiple languages. Legalities aside, AI can now assist us in performing these tasks and many others that previously took hours or days and incurred substantial costs, while still placing an emphasis on authentic talent and strong visuals.

Mark Brown
Executive Lead



I predict that the word of the year for 2026 will be "consolidation." The consolidation trends that we witnessed in 2025 will continue to escalate in the new year. If the IPG/Omnicom merger shows some financial gains—despite or perhaps because of the human cost—more agencies will follow suit. That will work to the advantage of mid-size independent agencies like Rain, who will continue to excel because we rely on personal relationships over size and volume.

The media world will continue to consolidate, too. That's an easy prediction given that either Netflix or Paramount will take over Warner Bros. Discovery (WBD) this year. (I predict it will be Paramount). WBD won't be the only media company that gets swallowed up in 2026: look for other linear networks and streaming platforms to merge or get bought next year. Media consolidation will not benefit advertisers. More inventory in the hands of fewer sellers will lead to higher media costs due to monopolistic practices.



Finally, the adtech lumascape is due for a shake-up. While Amazon's demand-side platform (DSP) price squeeze is an attempt to steal business from The Trade Desk, I predict it will also force smaller players in the supply and demand side of digital inventory to either partner up or risk being left behind. There will still be a place for smaller, independent supply-side platforms (SSPs) and DSPs, but only if they find a unique offering to advertisers and agencies. Offering the same as The Trade Desk, Google and Amazon—even at a lower price—won't cut it.

Robin Cohen
EVP, Media Planning



I expect a larger shift in investment by brands who have typically leveraged a national approach leaning into localized strategies. Local markets have the ability to serve as mini incubators, allowing for marketers to understand the incrementality of channels, while also evaluating the impact of different media mixes on KPIs across the entirety of the media funnel. In addition, messaging can be more appropriately tailored to reflect market nuances.

One of the areas where I expect to see the largest uptick in spend locally is in CTV. Leaning into retail sales data, advertisers have the ability to serve impressions to consumers where they live and shop. Differences in weather, news, and events all influence media consumption habits and shopping behavior at a local level, and brands who understand those nuances will win in retail.

Kyle Eckhart
SVP, Chief Operating Officer



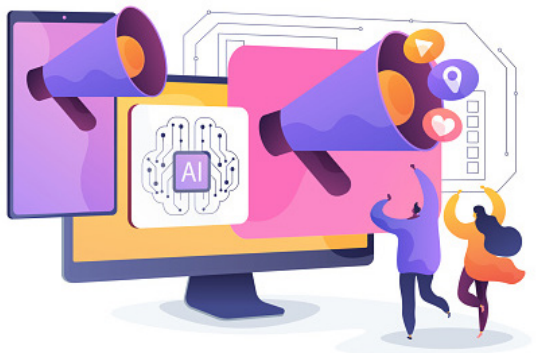
It doesn't take a crystal ball to see that AI and technology innovation will continue to dominate industry conversations in 2026. After a year of inflated claims and uneven results, we expect a continued market correction around how heavily AI is prioritized in marketer and agency growth plans.

Predictions for 2026 *(continued)*

In 2025, several agencies learned the hard way that positioning AI as a replacement for people was both strategically risky and creatively tone-deaf. Many quietly pivoted as backlash grew among consumers and workers who questioned the ethics, accuracy, and creativity of fully AI-driven solutions. The lesson was clear: automation has enormous value, but replacement-level language is not only harmful—it misrepresents what these tools can realistically do.

At Rain, we've taken a different approach. We leverage AI across nearly every service division, but our mission is to empower teams with tools and skills that help us work smarter, extend our capabilities, and concentrate on higher-value thinking. We want our people ahead of the curve—spending less time on busy work and more time on creativity, strategy, and connection.

In 2026, we expect more marketers and agencies to converge on this balanced position: AI as an accelerant to human expertise, not a substitute for it.



Stasia Fulginiti

Director, Paid Search + YouTube



- **AI-native placements will blur search and social:** Paid search will live inside feeds, conversations, and recommendation environments that look and feel a lot like social. Ads will show up as answers, suggestions, or "helpful" next steps. If your creative only works as a text ad, you'll lose. Search ads will need to earn attention the same way social ads do.
- **First-party data becomes the connective tissue:** Your CRM, site behavior, and customer lists will power both search and social together. The same signals will guide bidding, targeting, and creative sequencing across channels. Teams that still treat search and social data separately will fall behind.
- **Performance shifts from clicks to influence:** Search will no longer just capture demand, it will help shape it. Measurement will focus on incrementality, assisted conversions, and how paid media moves someone from discovery to decision, not just who clicked last.
- **Creative does the targeting now:** As platforms automate audiences, your message determines who engages. High-performing search ads will borrow lessons learned from social: strong hooks, clear POVs, and thumb-stopping visuals that work across formats.
- **Human strategy is the differentiator:** Automation connects channels, but humans decide when it's working. Marketers who can read between the metrics, connect signals across search and social, and push back when efficiency masks long-term damage will have the advantage.

Shuree Jones

Group Director, Paid Social & Influencer Media



Savvy marketers in the paid social space have already adopted the position that creative is the new targeting; at Rain, we've been talking about it for years. Creative drives engagement, relevance, and ultimately conversions, meaning marketers are doubling down on short-form, authentic storytelling that feels like it belongs in a feed rather than interrupts it.

In 2026, leaning into creative effectiveness as the primary performance lever will evolve into the push and pull between creative volume and creative diversification.

The focus on creative as the new targeting has moved some marketers to believe that sheer volume is the key to finding winning assets quickly. With creative fatigue happening faster than ever and algorithms favoring new, fresh content, those in the "volume over everything" camp think that the more shots you take, the higher the chance of discovering a scalable winner and keeping audiences engaged.

Predictions for 2026 *(continued)*

However, there's a growing chorus (our team included) cautioning that volume without strategic diversification can become noise rather than insight. It's not enough to just make more content; what matters is testing diverse creative approaches, narratives, and formats across audience segments. This means balancing high-volume experimentation with thoughtful diversification: exploring different emotional hooks, net-new concepts by proof point, UGC-style authenticity, creator partnerships, and platform-native formats (like under-produced TikTok vs. polished Instagram).

Marketers who balance volume with diversification will win as AI accelerates production and human differentiation becomes key.

Artem Peplov
VP, Analytics



2026 will accelerate the evolution of marketing analytics, especially across video, AI-driven discovery, and commerce.

- Marketing mix modeling (MMM) and incrementality will become the operating system for video investment, enabling weekly budget shifts based on measured lift rather than last-touch attribution.
- Search will evolve from rankings to "share of answer." As AI summaries and chat-based interfaces reduce clicks, brands will prioritize structured data, credible creator and customer signals, and paid presence within AI-generated answers.
- Creative analytics will scale in importance. GenAI will dramatically increase creative volume, pushing teams to optimize toward attention and incremental impact—identifying which scenes, hooks, offers, and edits actually drive lift.
- Retail and commerce media cement their role as core lower-funnel channels, with leading brands treating retail media networks as a diversified test-and-learn portfolio instead of a single Amazon-centric line item.

Rian Schmidt
Chief Technology Officer

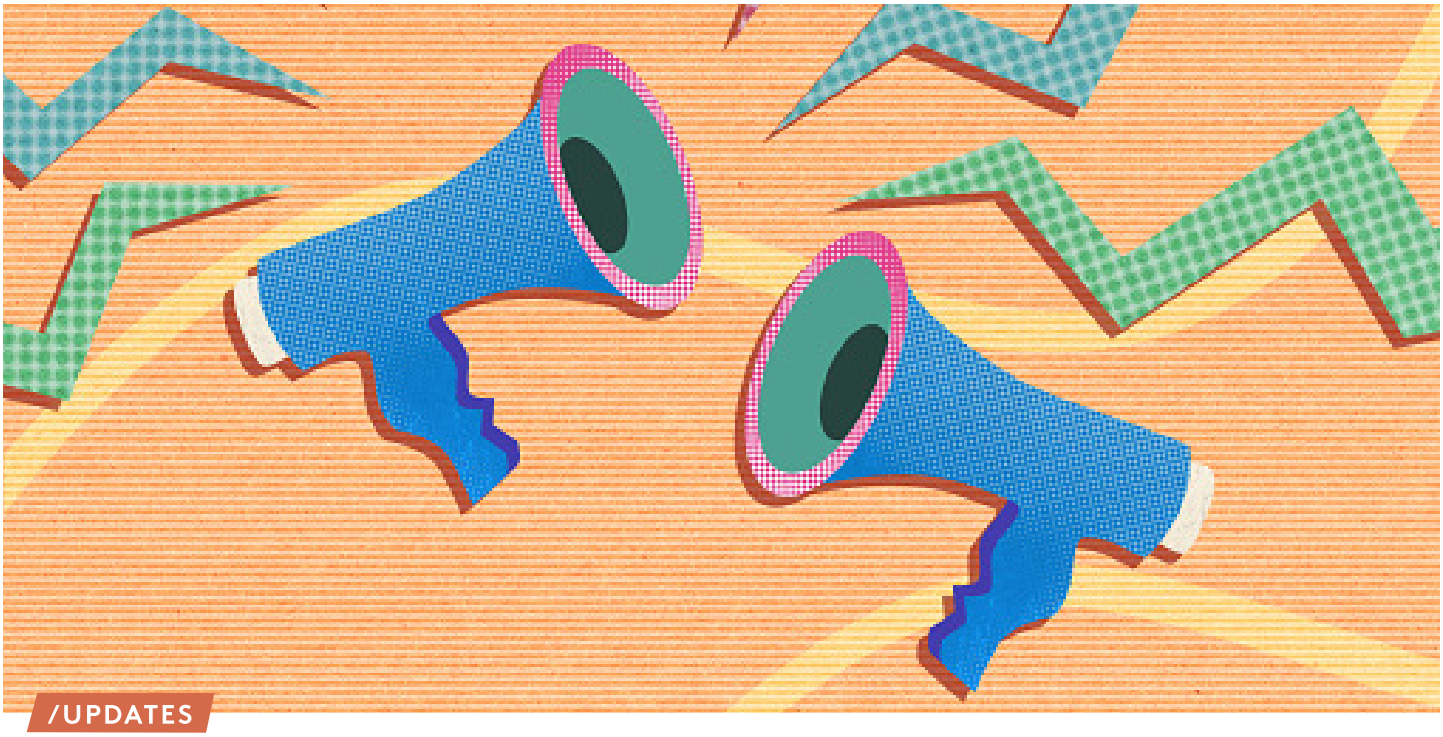


Marketing in 2026 will finally accept that identity resolution will not be reliable. Cookies are decaying, platform IDs aren't portable, and deterministic targeting is becoming increasingly unreliable. Paid media will run more on modeled audiences and probabilistic signals. Clean rooms will become more standard infrastructure for activating first-party data without breaking privacy rules.

That will lead to a shift in measurement. As identity resolution weakens, attribution becomes less credible. CFOs will push the industry toward incrementality as the actual proof point. Media mix modeling, geo-testing, and causal experiments will increasingly become baseline requirements for budget decisions. The most valuable capability won't be targeting. It will be proving lift.

This will raise the technology bar for everyone. Agencies will need real technical rigor to compete as tools become more sophisticated. That will increase differentiation. Some agencies will morph into platforms, developing and selling complex measurement and activation systems. Others will focus on creative and narrative work, plugging into the technical marketplace without owning it. Either way, technology will cease to be simply a support function and act as a critical business enabler.





/UPDATES

A Case for Advancing Reach and Frequency

By Stephanie Filipek, Group Director, Media Planning

It's been 15 years since Byron Sharp's "How Brands Grow" was published, where he makes the case for reaching more people at a meaningful frequency. Whilst reach and frequency are not departing from marketing vernacular anytime soon, I propose we evolve these passive two dimensional metrics to a third dimension. Instead of viewing them as byproducts of a media plan, I propose we make them work harder for us by turning them into actionable planning levers.

First, by incorporating cost into reach planning:

- **Cost per Reach Point (CPRP)** introduces an efficiency lens, quantifying the cost of each percentage point of reach. This enables planners to compare channels more equitably and make more precise allocation decisions within channels such as linear TV, Connected TV (CTV), and paid social.

Second, by considering incremental gains in reach through a cost lens:

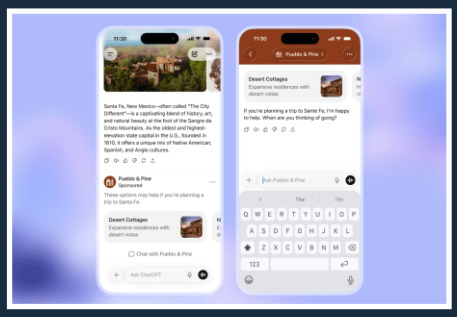
- **Cost per Incremental Reach Point (CPIRP)** advances this thinking further by showing where each dollar can drive the greatest incremental impact — helping marketers identify both optimization opportunities and potential areas for new investment.

I cannot speak about reach without acknowledging its life partner, frequency. I see an opportunity to test and learn the "ideal frequency thresholds" needed to drive specific KPIs with more rigor. This would require moving marketers from 1+ reach (people who see an ad one or more times) defaults because the first time one hears about or sees a new product or service is often not enough exposure to take action.

Each product and service has its own diminishing returns frequency which in turn defines what average frequency reach is the most meaningful for a marketing campaign. Setting up tests to understand this optimal frequency range would be incredibly powerful when paired with utilizing CPRP and CPIPR.

Ultimately, I recommend a shift in mindset around these metrics from passive forecasting tools to active drivers of media investment to enable more efficient and effective performance. We've utilized these tactics with one of our largest clients resulting in continued campaign success even with expanded budgets.

/QUICK HITS



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Need More Guidance?



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