



OMNICOM MEDIA

The Future of Brand Influence

The New Brand Growth Model for Maximizing Impact and Outcomes

JANUARY 2026

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01 Introduction

Omnicom Media Intelligence has, over the past several years, researched several critical forces of change shaping the future of media and advertising. We have looked at shifting consumer expectations around connected shopping experiences, at how searching has evolved and diversified into a wide-ranging set of behaviors across platforms, at the evolution of Live from a single tentpole moment in time to an ecosystem of content, conversation, and behavior, and, most recently, at the profound shift that Generative AI (GenAI) is having on how people discover, learn, and buy. When we look at this whole body of work, a clear and compelling picture emerges: the sources of influence that shape consumer preferences and purchases have grown and shifted, and this impacts brands in many ways.

With this latest piece, we set out to explore the shifting picture of “influence” in more depth, and to develop a strategic point of view designed to help brands not only navigate this new terrain, but to do so with some new rules of brand growth in mind.

We tapped into a range of resources to accomplish this: running net new, proprietary consumer research; mining our cultural intelligence tool, Q; doing extensive explorations of academic and industry literature; and tapping into our expert colleagues throughout the network.

The goal of this effort? To help brands make investment decisions designed to cut through the clutter, create connection, and maximize business return today – and over the long term.





02 The Way Consumers Are Influenced Is Evolving

The Way Consumers Are Influenced Is Evolving

The “influence” question used to be fairly simple and straightforward – people browsed store shelves, turned to friends and family, trusted experts/professionals, news and entertainment sources on TV/radio/print, and advertising to discover new products and services and to make decisions about what to buy.

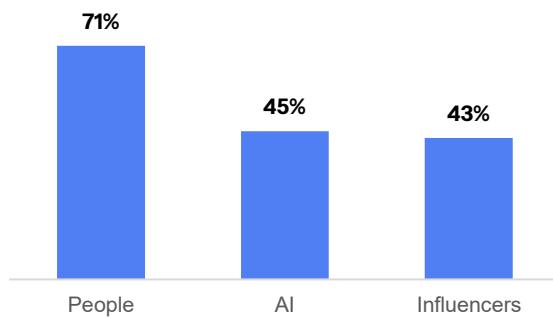
Today, the picture looks very different. From influencers to human-like AI chatbots the question of how to understand “influence” has become far more complex, which raises real-world questions for brands in a world where advertising is just one of many sources that influence consumers’ decisions.

According to our most recent research, consumers say a brand’s advertising has less sway over their decisions than what other sources – including other consumers, AI, and influencers – say about the brand (Figure 1).

Figure 1

What Matters

When it Comes to Influencing Consumers’ Decisions



In fact, when we asked people about what matters more than a brand’s advertising, nearly three-quarters (71%) told us what *people* are saying about a brand matters more. Additionally, for nearly half of consumers, it is what AI says (45%) and what influencers say (43%) that matter more than advertising when it comes to influencing their opinions and decisions about brands (Omnicom Media Future of Brand Influence, 2025).

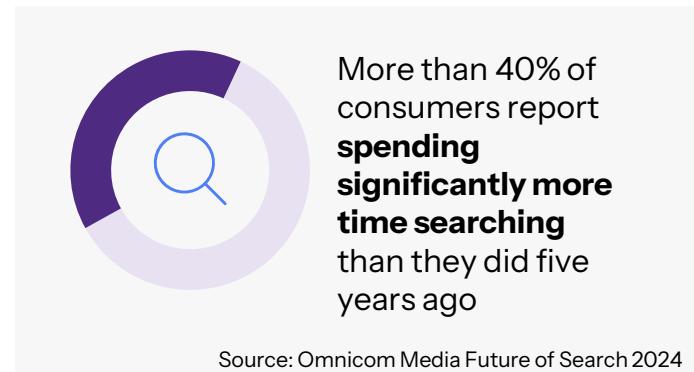
Source: Omnicom Media Future of Brand Influence 2025

What big shifts underlie these perceptual changes?

Sources of Information are Exploding With New Platforms Wielding Increasing Clout

Today, data and information are more ubiquitously available, personalized, targeted, digestible, and useful than ever before. With advancements in internet connectivity and technological leaps like the smartphone, we have never had more information available to us at our fingertips. In fact, more than 40% of consumers report spending significantly [more time searching than they did five years ago](#), with two thirds saying they turn most often to their smartphones to search (Omnicom Media Future of Search 2024).

Figure 2



Source: Omnicom Media Future of Search 2024

Concurrently, social platforms like Facebook, Reddit, TikTok, YouTube, and Instagram have evolved into dynamic learning environments, where users actively seek information while also passively absorbing algorithmically curated content. Over half of U.S. adults (54%) now [get their news from social media](#), with TikTok’s news usage alone [surging from 22% in 2020 to 52% in 2024](#). Our recent research found that 30% of consumers claim that social media platforms provide better search results, and 24% say they get better answers from online forums and communities (OMFOS 2024). Community-driven platforms are some of the leading resources for online product research as they evolve into trusted hubs featuring peer reviews and tutorials. Reddit for example has acted as a crossroads of consideration with [71% of people discovering a brand online or off saying they researched it on Reddit](#).

And increasingly, Generative AI is empowering consumers to engage with information in more personalized, conversational, and deep ways. Any interest or curiosity can now be queried, summarized, explored, and then actioned upon as we “converse” with platforms like OpenAI’s ChatGPT and Google’s Gemini. In fact, 70% of people now say they can become an expert in any product/service category (e.g., best running shoes, best wearable health tracker, full pros/cons of a brand/product) courtesy of GenAI (OMFOBI 2025) (Figure 3).

Figure 3



Source: Omnicom Media Future of Brand Influence 2025

Information Asymmetry is Gone, Empowering Consumers While Ushering in Decision Paralysis

Prior to the internet, information asymmetry was the norm. That is, each party in a buyer/seller relationship had information the other did not, which impacted each party’s ability to make an informed decision. The classic example? [A used car salesman marketing a “lemon” as a high-quality automobile](#). Today, with the explosion of information – and information availability – this asymmetry is all but gone. Any buyer of any product or service can easily research and vet a seller’s claims. In fact, 92% of consumers now tell us that due to the abundance of sources, they are now finding all the information they need and can make their purchases faster than they could a few years ago (OMFOBI 2025).

But with information symmetry and ubiquity, consumers can also struggle with purchase anxiety and choice overload. In a [Think with Google study](#), 80% of respondents who have difficulty making purchase decisions say it is because they are given too much information or too many options.

Trust in Information Is Shifting From Institutions to People

Trust is influenced by a variety of sources. It is not binary – it exists on a continuum. Trust is no longer top-down either – it is instead distributed across peer networks where people validate information through collective debate, a point supported by our Element of Culture (EoC) “Distributed Trust” (EoCs are explained in Methodology section) (Figure 4).

Figure 4

 Hierarchical authority has given way to distributed trust. People rely on peer debate and collective validation for confirmation bias. Influence **emerges from consensus and the desire to belong**, not control.

Source: sparks & honey

As part of this shift, we are seeing trust migrate from institutional to interpersonal sources, a point exemplified by our EoC “Icon Toppling” (Figure 5). [According to Pew Research](#), 49% of US adults say journalists are losing influence in society, and a recent [Gallup poll](#) found that just 28% of Americans say they trust mass media. In contrast, our own research tells us that 54% of consumers say they actually trust *people* (influencers, people like them on Reddit or social media) more than publications or institutions (articles from publications, journalists). And for Gen Z, this percent jumps to 67% (OMFOBI 2025).

Figure 5

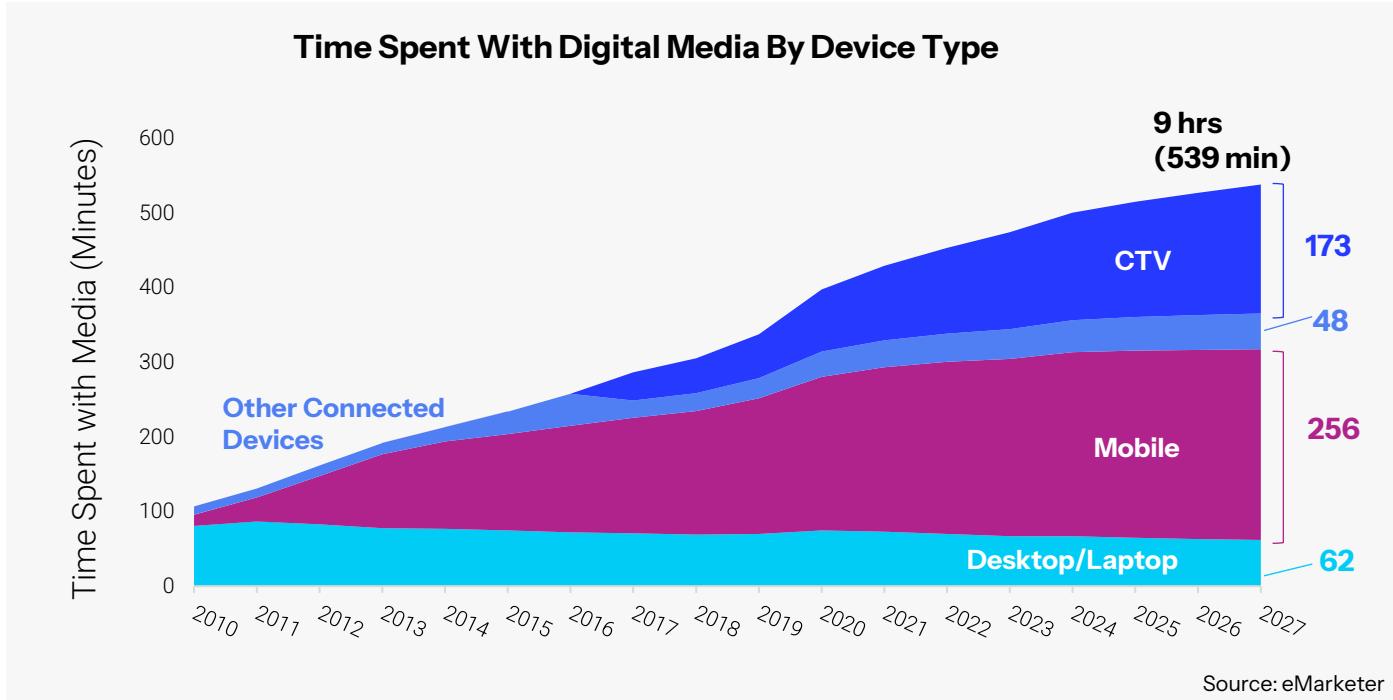


Radical transparency is eroding trust in once-revered institutions and brands. Loyalty has **shifted toward authentic, value-driven alternatives**.

Source: sparks & honey

Group chats environments, whether among friends or within larger interest-based communities, are trusted forums for product recommendations. Platforms like Discord, WhatsApp, Slack, Reddit, Telegram, and direct messaging on social apps are curated spaces where trust drives discovery. Unlike public-facing social media, these channels are opt-in and can feel more authentic and less performative.

Figure 6



Attention is Fragmenting As Multi-Device Use Grows and Content Proliferates

It is also the case that attention is harder than ever to capture as consumers wade through this increasingly digitized, internet-connected world. [According to eMarketer](#), consumers spend, on average, roughly 13 hours a day engaging with media, almost 9 of those with digital media (Figure 6). And this time is split across a plethora of content.

While overall total time – and the amount of content consumed – hasn't changed much in the last two years, what has changed is the *fragmentation of attention*.

[According to McKinsey](#), there are now 50x more amateur uploaders than professionals on Spotify, and 25,000x more hours of content produced on YouTube than traditional television networks and streaming services, etc. This swell of content is reflected culturally as well with our EoC "Snack Media" (Figure 7).

Figure 7



Attention spans are shrinking—and media is adapting. As broadcast rhythms give way to scroll-friendly formats, **content is becoming faster, punchier, and more algorithmically tailored**.

Source: sparks & honey

As consumers engage with all this content, they also do so across a variety of devices. In fact, consumers are often leveraging multiple screens at the same time, known as the second-screen phenomenon. [According to LG Ads](#), 95% of consumers multi-task while watching TV. And our own proprietary research found that when consumers are watching live tentpole events, 42% use their second screens throughout the event, with 44% doing so to keep themselves entertained (Omnicon Media Rethinking Live 2025).

The massive increase in content options coupled with second screen behavior is impacting people's attention: a whopping 63% of consumers say their attention span is just OK/not great (OMFOBI 2025) (Figure 8).

Figure 8

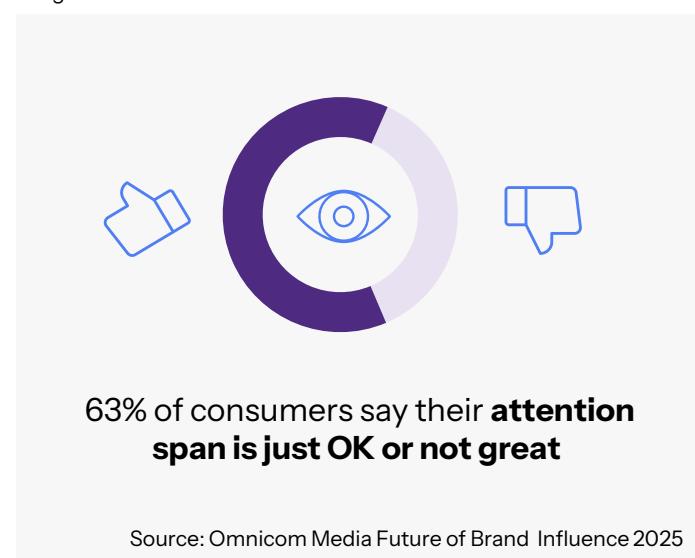
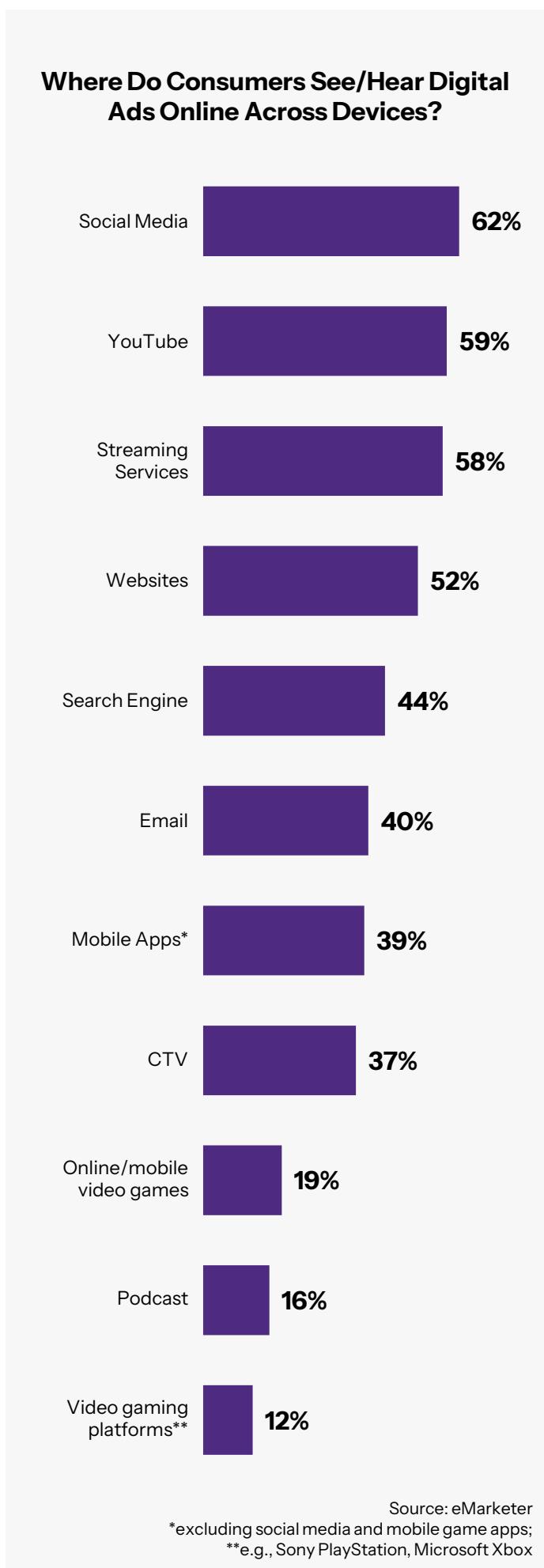


Figure 9

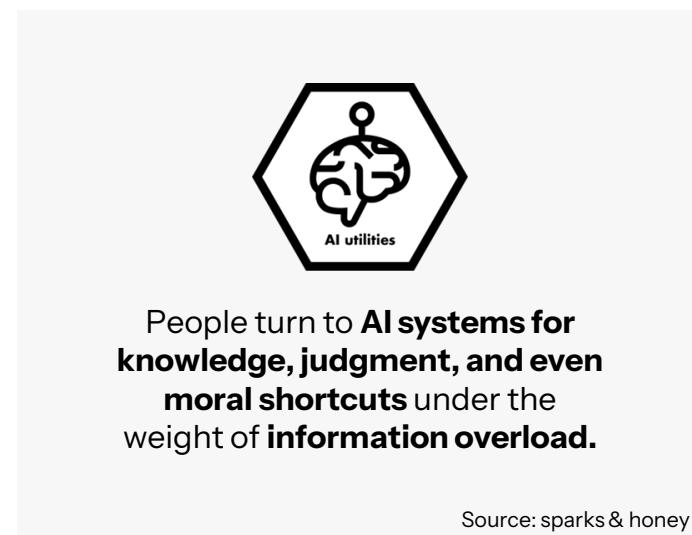


And this points to a clear consequence for advertisers: poor ad attention. According to [eMarketer](#), consumers say they don't always notice ads even in environments where ad load can be heavy: nearly 4 in 10 consumers don't report seeing ads on social media (an ad market of many billions of dollars) (Figure 9).

GenAI Platforms Are Serving as Much More Than Information Engines

The rapid adoption of GenAI and its impact on how consumers discover information and make decisions is both disruptive and profound. This aligns to a larger cultural trend of treating AI like a utility (EoC "AI Utilities"), something as essential to modern life as electricity (Figure 10).

Figure 10



As of July of 2025, 75% of US consumers were already reporting using some form of AI, with 46% of those doing so daily (Omnicom Media Generative Engine Optimization Research 2025).

Though information seeking was cited as the primary reason for using GenAI environments like ChatGPT and Gemini, shopping-related use cases are growing, and embedded [commerce capabilities](#) are rapidly advancing in parallel path. Roughly 33% of consumers told us in July of this year that they used GenAI to help them make their final purchase decision. And 44% said they trust AI brand/product recommendations, up from 35% in 2024 (Omnicom Media GEO Research 2025). While this Black Friday weekend saw ChatGPT referrals to retail mobile apps increasing 28% year-over-year as users turned to the GenAI platform for shopping advice and information ([Shelly Palmer, 12/3/25](#)).

Consumers Are Avoiding Ads Through Many and Varied Tactics

Ads are a brand's first line of offense in driving influence. But consumers' ability to block, opt-out of, or skip ads altogether interferes with this communication path, another force that can mitigate advertising's influence. Ad blockers, ad-free subscription tiers, device ID signal loss (e.g., IDFA and cookies), and VPNs interrupting location-based targeted ads are all ways consumers can limit or disable advertising.

[Censuswide found](#) that 52% of adults were using ad blockers in 2024 and [eMarketer cited](#) 37% of US consumers running ad blockers on their smartphone in that same year. Accordingly, there is a notable cultural movement to modulate individual privacy settings, which includes ad blocking (Figure 11).

Figure 11



Growing awareness of data exploitation is **making privacy a core expectation.**

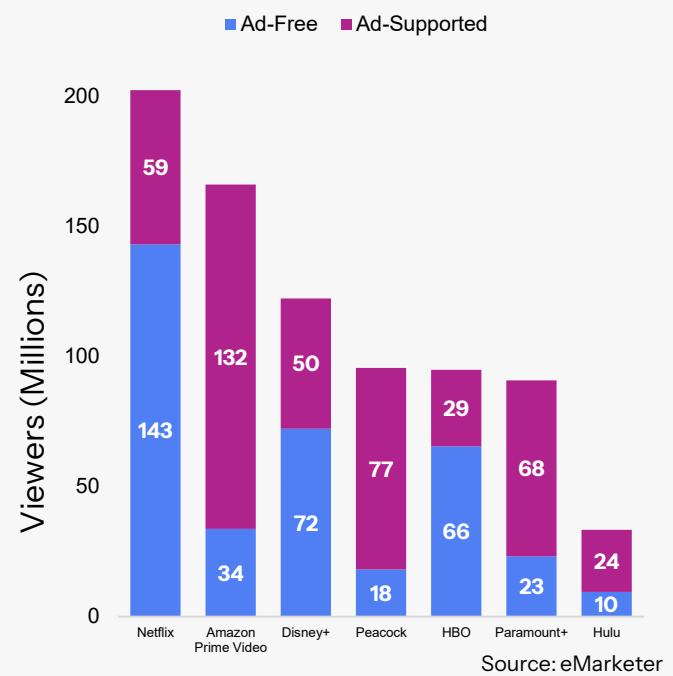
Source: sparks & honey

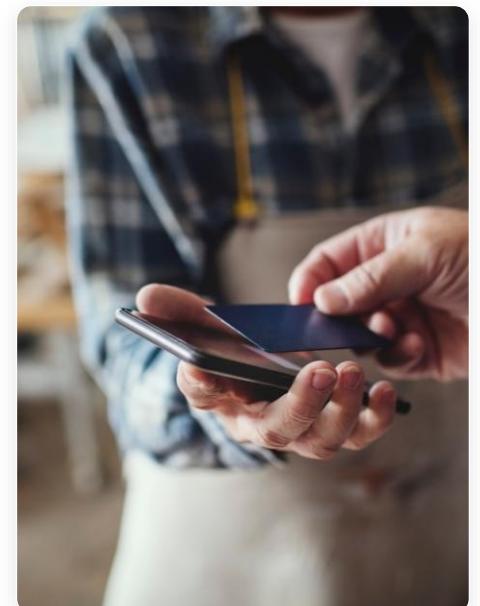
Additionally, highly popular media channels – most notably streaming TV – regularly feature premium subscription tiers that reduce or remove advertising entirely.

That said, it is important to point out that the split between ad-supported and ad-free can vary drastically by platform (Figure 12), with Netflix leaning heavily toward ad-free and Amazon Prime Video much more heavily ad-supported (with its early 2024 ad-supported Prime Video rollout featuring an “opt-out” vs “opt-in” for advertising).

Figure 12

Ad-Free (SVOD) vs Ad-Supported (AVOD) Viewers for Major CTV Streaming Platforms, USA 2025





03 Economic forces and market dynamics

Economic Forces and Market Dynamics Also Shape Consumer Choice

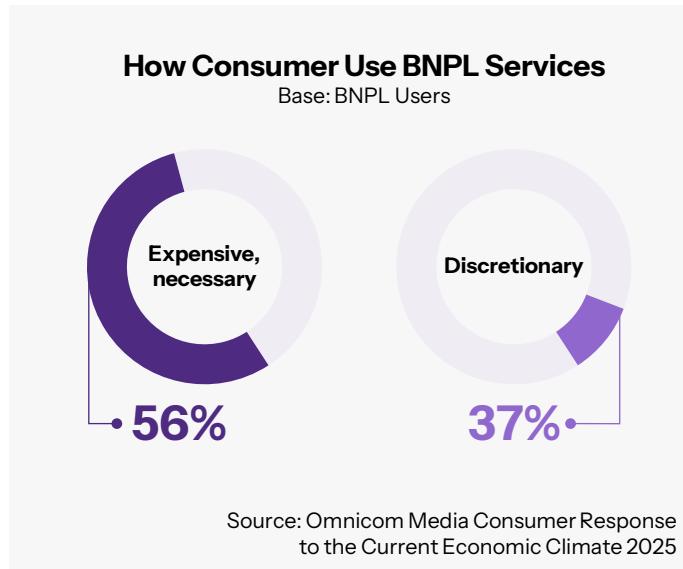
Economic uncertainty is guiding – and reshaping – consumer behavior.

A convergence of economic forces, among them inflation, tariffs, and, less tangibly, a sense of generalized uncertainty are impacting consumer decision-making.

76% of US consumers have reported changing their spending habits, whether by buying less, trading down, or cutting purchases altogether (Omnicom Media Consumer Response to the Current Economic Climate 2025). More than 4 in 10 consumers now tell us they are buying less than they used to. And while in May of 2025 just 19% of consumers reported switching to less expensive brands to save money (OMCRCEC 2025), now about one third report buying cheaper versions of the brands they usually buy for that reason (OMFOBI 2025) (For additional context, in 2022, as the impact of the pandemic lingered, 41% of people reported reduced spending by switching brands).

Services like Buy Now, Pay Later (BNPL) have gained traction, especially for high-cost essentials. According to our research, 56% of BNPL users rely on these services for expensive “necessary” purchases, while over a third also use them for discretionary items, highlighting how affordability concerns are reshaping not just what people buy, but how they pay for it (OMCRCEC 2025) (Figure 13).

Figure 13



At the same time, the markets in which brands operate are becoming more dynamic and competitive.

Direct-to-consumer (DTC) entrants and private label brands are challenging legacy players. The DTC model, now a [\\$239.75 billion market in the U.S.](#), has matured from a disruptive trend to a mainstream strategy for start-ups and global corporations alike as consumers continue to be drawn to DTC alternatives that offer quality, convenience, and personalized experiences on top of what can feel like more transparent pricing.

Private label products – those manufactured by a third party and sold under a retailer's own brand name – are another market force at play, as they are often positioned as lower-cost alternatives to national brands. [79% of consumers are willing to purchase private label brands](#), particularly during stock shortages or when price sensitivity is high. Though private labels are [gaining traction in categories where quality differentiation is perceived to be low](#), such as pantry staples, household goods, and personal care products, [74% of consumer say they have favorite brands they stick with](#).

Figure 14



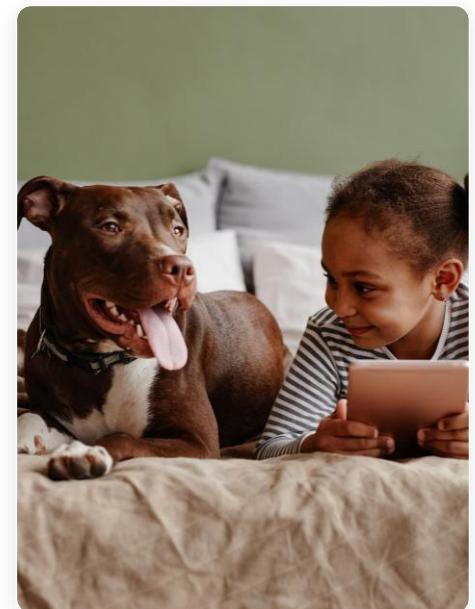
And digital marketplaces – most notably Amazon here in the US, [which now commands over 40% of US ecommerce](#) – have reshaped expectations around access and convenience, creating new table stakes expectations from consumers and raising the bar for virtually every organization who sells goods (Figure 14).

With all this as a backdrop, consumer expectations overall have grown.



Consumers want convenience, affordability, and ultimately omnichannel access to all their needs on their terms.

Brands must rise to meet this new moment or risk losing them entirely.



04 The Role of “Brand” in Influencing People

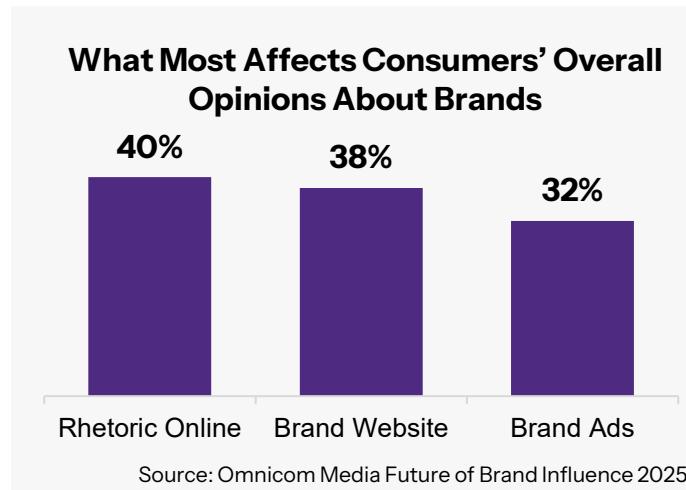
What is the Role of “Brand” in Influencing Consumers?

With all these forces as a backdrop, it is important, then, to consider the role of “brand” in shaping consumer decision-making and if, or how, that has changed over time.

But what is “brand” anyway? In its most simplistic state, a “brand” is a label for a product or service. But we all know it is much deeper than that. The *essence* of a brand is a lot more than the product or service it sells. It includes how consumers perceive, think about, and relate to the product or service. And so, the product or service itself can be thought of as a faceplate representing the complex interplay of *tangible* longstanding attributes like price, quality, and functionality, but also the *intangible* attributes including trust, authenticity, reputation, relevancy, and value. Now let us consider availability, accessibility, and convenience, and we begin to understand the complex state of brand today.

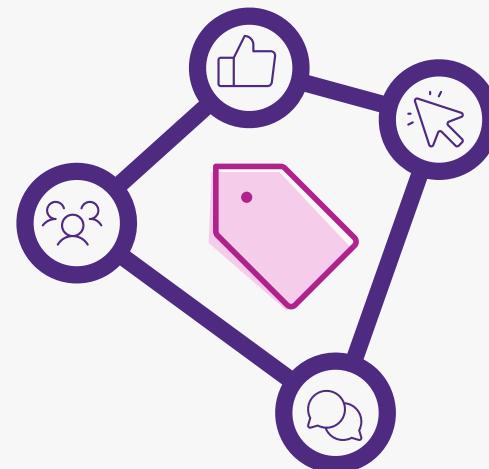
And it’s important to be reminded that a brand’s influence over consumers’ mindsets and behaviors is only one of *many* influences. Brand content – in the form of advertising and marketing – now sits alongside many other ways that a brand may be represented. When we asked consumers about what most affects their overall opinions about brands, only 32% reported it’s a brand’s advertising, with only slightly more (38%) saying it’s the brand’s website (compared to, for example 40% who cite “what people online are saying about the brand” (OMFOBI 2025) (Figure 15).

Figure 15



Since brands are now also represented by *many other sources of influence*, it is very important for brands to take the reins of what they *can* control in shaping how consumers think and feel about them.

In an environment of fragmented influence where the consumer is in control – and is poised to be the focus of where the future of influence lands – brands must do more than be present. They must break through the noisy stew of influences to not only increase brand awareness and recall but also drive *connection* in ways that matter to consumers, whether the brand’s campaign objective is to drum up immediate sales or build long-lasting loyalty.



In an environment of fragmented influence where the consumer is in control – and is poised to be the focus of where the future of influence lands – **brands must do more than be present.**

Today, consumers see certain things as table stakes from brands. But what is necessary is not always sufficient. Price/cost of products is what matters “most” to three-quarters (72%) of consumers who regard the price tag as a point of entry for brands. This is not surprising, nor necessarily novel. Understanding that marketers cannot always control this lever though, it is important they lean into what they *can* control – a sense that they are in it for more than consumers’ dollars. A whopping three-quarters (72%) of consumers feel that brands are more interested in earning their dollars than their hearts/loyalty, and half (55%) of all consumers told us they feel that brands don’t even try to connect with them the way they used to. (OMFOBI 2025) (Figure 16).

Figure 16

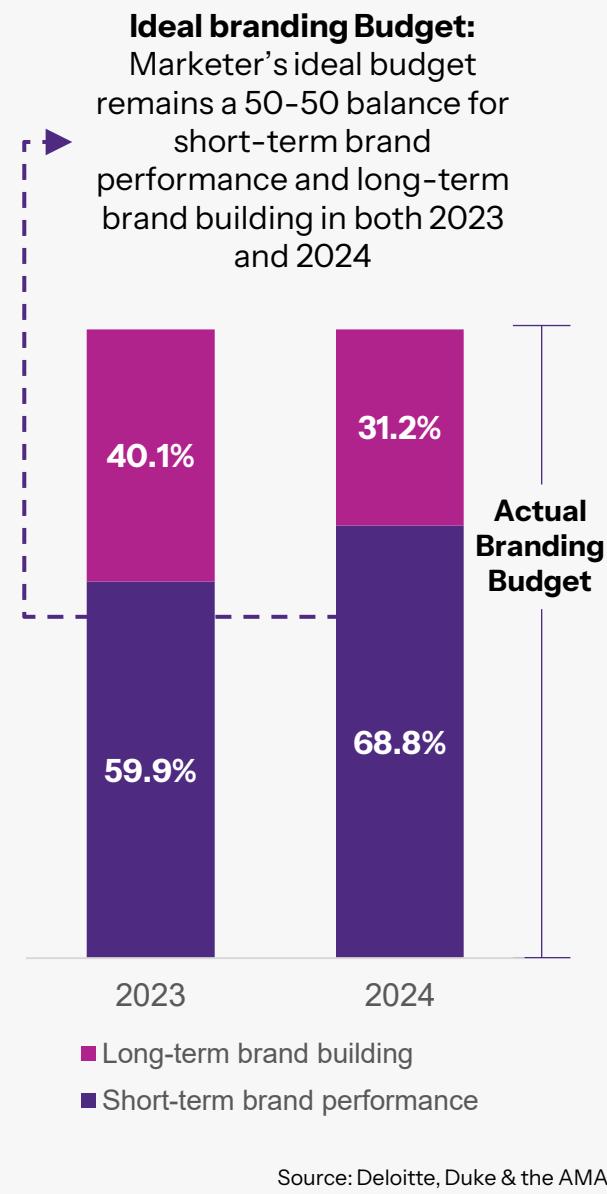


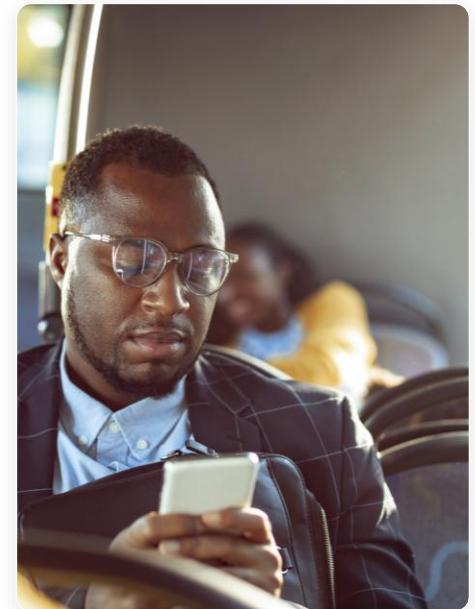
With this as a backdrop it is important to acknowledge the major challenge that CMOs often face: pressure from many angles to demonstrate return in a short time horizon. A study [from Duke, Deloitte and the AMA](#) found that in 2024, 68.8% of budgets were allocated to short-term performance tactics—up from 59.9% in 2023—despite CMOs indicating that a 50:50 split was their ideal spending ratio (Figure 17). And [Interbrand's 2025 Role of Brand report](#) found that for many major verticals, the role of brand – that is, “the percentage of a customer’s decision that relies on brand over attributes such as price and product features” is eroding, continuing to decline year-over-year.

Yet, empirical evidence supports the hypothesis that investment in brand is valuable for a business’s performance when proper metrics are employed to understand brand investment’s actual value. Recent work from the MMA showcased brand’s value-driving power across categories ranging from grocery to financial services, and [this work featured in Harvard Business Review](#) outlined the direct business growth attributable to “brand equity” (a custom, composite metric), noting the new measurement framework also helped brands estimate needed investment levels to reach desired business goals.

So, the area where brands may be able to make the most impact in driving positive sentiment, affinity and ultimately business growth is the area of investment most often challenged.

Figure 17





05 The New Rules Of How Brands Grow

The Traditional Rules of Brand Growth Need a Rethink

These new market and consumer realities demand that we rethink the traditional paradigms relied upon to achieve the goal of long-term brand and ultimately – business – growth. So, if the old rules need a rethink, how do we define the new rules?

Redefining Physical Availability in the Era of Ubiquitous Commerce



Physical Availability

Product presence, and how easy it is for consumers to purchase a brand's product(s). A brand with high physical availability is easily accessible (prominence) in the right place (presence) at the right time (relevance).

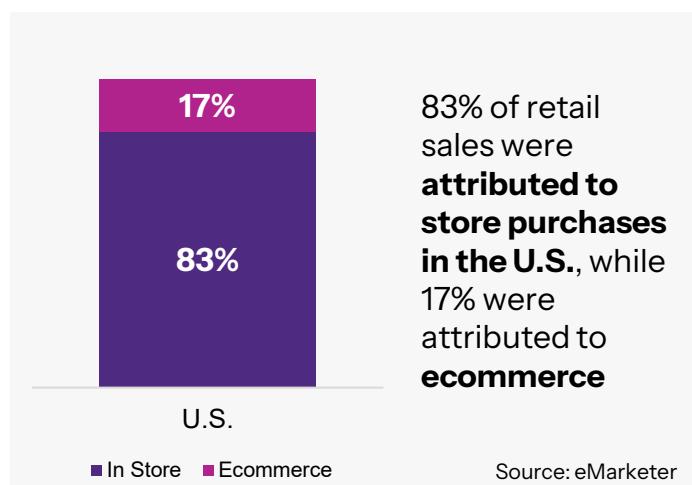
Source: How Brands Grow

Looking back to 20 years ago, product availability followed a relatively simple rule: shoppers visited stores to find products in stock. This meant that a deep focus on shelf space and product availability was the baseline requirement as a part of brands' growth calculations. But today, they face:

A Preference for Omnichannel: Omnichannel is the new normal for shoppers, with 78% of consumers expecting retailers and consumer brands to have a fluid and seamless presence across all their physical and digital "storefronts", essentially "bringing products to them" in the manner of their choosing. Innovations like online delivery/expedited shipping, curbside pickup, smartphone apps for mobile shopping and strong online/offline customer service continue to change – and raise – consumer expectations, even as brick and mortar dominates actual sales (Figure 18).

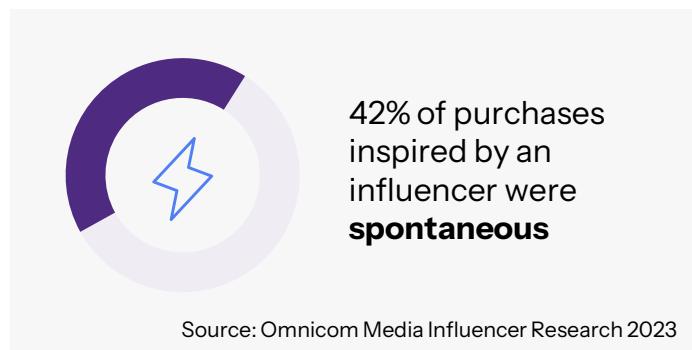
Even traditionally high-consideration, typically in-person purchases are going digital to make the shopping process more consumer-centric, with companies like [CarMax bringing cars to people](#). This fluidity is reshaping the purchase journey, with 80% of consumers taking a non-linear path from discovery to purchase (OMCC 2024).

Figure 18



Influencers & Social Commerce: Social platforms have also become powerful commerce marketplaces. The social commerce market in U.S. is expected to [grow by 14.4% annually and reach \\$114.70 billion in 2025](#), with 44% of consumers saying they discover products through brand ads integrated into their social feeds and stories, and 41% citing sponsored influencer posts as a key source of product discovery (Omnicom Media Social Marketplace Update 2025). Algorithmic personalization and "social proof" embedded in these platforms through comments and likes contribute to building consumer confidence and product validation in real time, making the shopping experience feel more authentic, community-driven, and impulsive (Figure 19).

Figure 19



Interactive & Shoppable Ads: Digital advertising is also helping to enable commerce anywhere. Shoppable ads allow consumers to discover and buy products instantly, with 37% of people saying these ads introduced them to new brands and 35% crediting them for purchase decisions (OMCC 2024) (Figure 20). Commerce-enabled ads now span CTV, social, search, and gaming, making every screen a potential storefront.

Figure 20



Commerce-Enabled GenAI: GenAI platforms are increasingly acting as a new form of shelf space for brands as consumers discover, make decisions, and even purchase in these environments.

[ChatGPT now enables users to shop directly from platforms like Etsy and Shopify](#), with instant checkout capabilities embedded into the chat interface. This marks a significant shift: users can move from product exploration to purchase without ever leaving the conversation. This integration turns LLMs into commerce-enabled agents, collapsing the traditional path to purchase into a single, frictionless interaction.



Reassessing Mental Availability When Reach and Frequency Are Necessary But Not Sufficient



Mental Availability

Memory and how easily a consumer recalls or notices a brand in buying situations. A brand with high mental availability is easily thought of (salience) in the right context (relevance) at the right time (purchase occasion).

Source: How Brands Grow

The traditional conception of mental availability – the probability that a buyer will notice, recognize and/or think of a brand in buying situations – makes intuitive sense. If a consumer sees a brand on a shelf and recognizes it, they are presumably likelier to purchase it than if they did not recognize it. This concept can naturally extend beyond “the shelf”: consumers can recognize brands in an advertisement, marketing message, or organic mention (from a celebrity, in the news, etc.) even if they are not in a buying mindset. This “mental penetration” refers to the proportion of buyers who have a cognitive association with a brand.

Growing mental availability, then, has sat for decades on the premise of maximizing reach and frequency, ideally to the point of – but not beyond – diminishing returns (which in reality is no small feat). The more people who see your ads, and the more often they see them, the more mental availability your brand can capture.

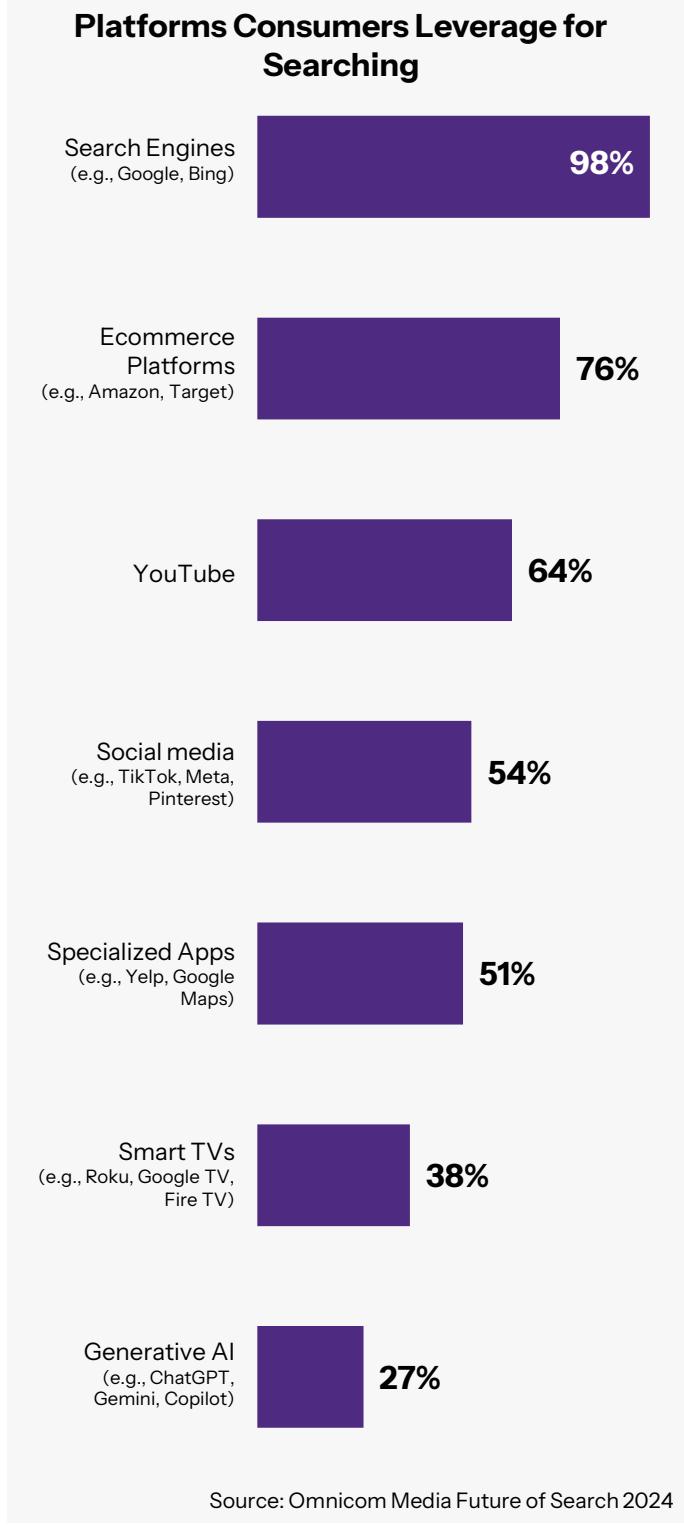
But, just as the rules of physical availability have changed, so too have those of mental availability:

More Touchpoints, Less Control: Digital media has seen an explosion of channels, touchpoints, and platforms, as we discussed, which introduces more and more marketing complexity and noise.

And with reviews, social media and videos, forums, memes, and more, a brand’s messaging is now just one part of a loud choir, one that it does not have full control over.

An example of how easy it can be for a brand to either appear – or not – as consumers hunt for information can be found in search, as the act of searching itself has fragmented across many places, from social sites to retail ones (Figure 21).

Figure 21



GenAI Disintermediates Brands From Consumers:

GenAI, the most recent, and disruptive, touchpoint in the mix, adds a whole new layer of complexity for brands when it comes to the already shifting paradigms of consumer discovery. AI models may (or may not) surface and “recall” brands for consumers for discovery and consideration. These AI models can pull together nuanced, specific recommendations for each individual consumer based on that consumer’s specific needs. Critically, this function can be done without a consumer ever seeing a brand logo or brand messaging.

Reach and Frequency Principles May Be Stymied By Ad Avoiders:

As noted earlier, many consumers are choosing to opt out of advertising through a myriad of ways, thereby tuning out the very brand messaging typically associated with reach and frequency campaign goals.

This may mean that a brand’s reach is lower than expected if consumers are paying to avoid that brand (and others’). This tension—consumers wanting more personalized experiences and ads while simultaneously taking steps to avoid ads—can seem contradictory, but the resolution lies in a complicated set of factors, such as how the ad disrupts or does not disrupt the consumer’s activity.

So how, then, does a brand earn, and maintain, mental availability in today’s media landscape where reach and frequency are table stakes but may be insufficient?

The definition itself may be too narrow.



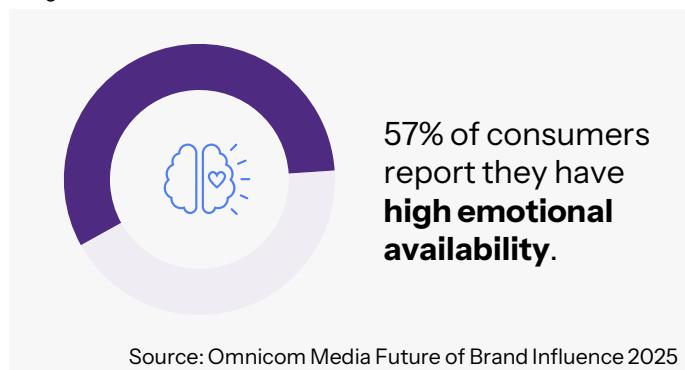
Emotional Availability Is the Third Component of The New Brand Growth Model

It has therefore become imperative for marketers to also capture consumers' net new emotional availability—that is, their willingness to connect and engage. Specifically, the ways in which consumers feel a brand is authentic, has values that align with their own, feel they can trust and rely on a brand, determine whether/if a brand brings them feelings of connection and joy, among other things.

According to our research, 75% of consumers reported that a brand's relatability is essential to them when making a purchase decision. (OMFOBI 2025). Yet recent [Hive Science](#) research found 86% of consumers report they are "sometimes" or "frequently" served ads on digital platforms that are either neutral or even disconnected with who they are as people, making the emotional connection difficult.

So it is now **essential** for brands to consider emotional availability as a necessary complement to mental availability: by not connecting with consumers, brands are missing out on a key opportunity (Figure 22).

Figure 22



Consumers Crave Human Connection, Both Personal & Shared

More than half (59%) of all consumers have told us that they need a brand's messaging/advertising to deliver on both shared and personal experiences.

At an individual level, nearly three in ten consumers say that "personalization that feels respectful and relevant" would increase their emotional connection to a brand even more.

And almost two-thirds (61%) of consumers told us that for a brand to grab their attention these days, they need to create and/or tap into a shared cultural moment or community (OMFOBI 2025).

Brands Need to Tap In



62%

Consider this: almost two-thirds (62%) of consumers told us that for a **brand to grab their attention** these days, they need to **create and/or tap into a shared cultural moment or community**

Source: Omnicom Media Future of Brand Influence 2025

By having a presence in shared cultural experiences, we also know that when a brand advertises during such moments and events, half (50%) of consumers say they feel more positive about the brand (OMFOBI 2025).

Value Alignment is a Driver of Consumer Choice

And while we can appreciate that what consumers say and what they do are not always the same, there is a strong case to be made for considering the importance people may place on a brand's values in their decision-making. According to our research, two-thirds (66%) of consumers say that when making purchase decisions, it is very important for a brand's values to align with their own. Further, 20% say alignment with personal values contributes to their decision to purchase from a new (to them) brand (OMFOBI 2025).

Authenticity Helps Brands Grab and Keep Customers

Brand positioning must be viewed as authentic, or else brands run the risk of being perceived as “fake”. The cultural EoC Moral Imperative provides cultural context for this consumer mindset. Consumers no longer take claims at face value – every message is cross-checked against peers, experts, and data (Figure 24). Authenticity is no longer solely about being real or relatable – it is about being verifiable. Nearly four in ten people told us that when a brand “feels authentic” it makes them stay loyal (only bested by table stakes items including has great quality products (63%), products are good value for price (61%), and customer service goes above and beyond (39%)).

Figure 24

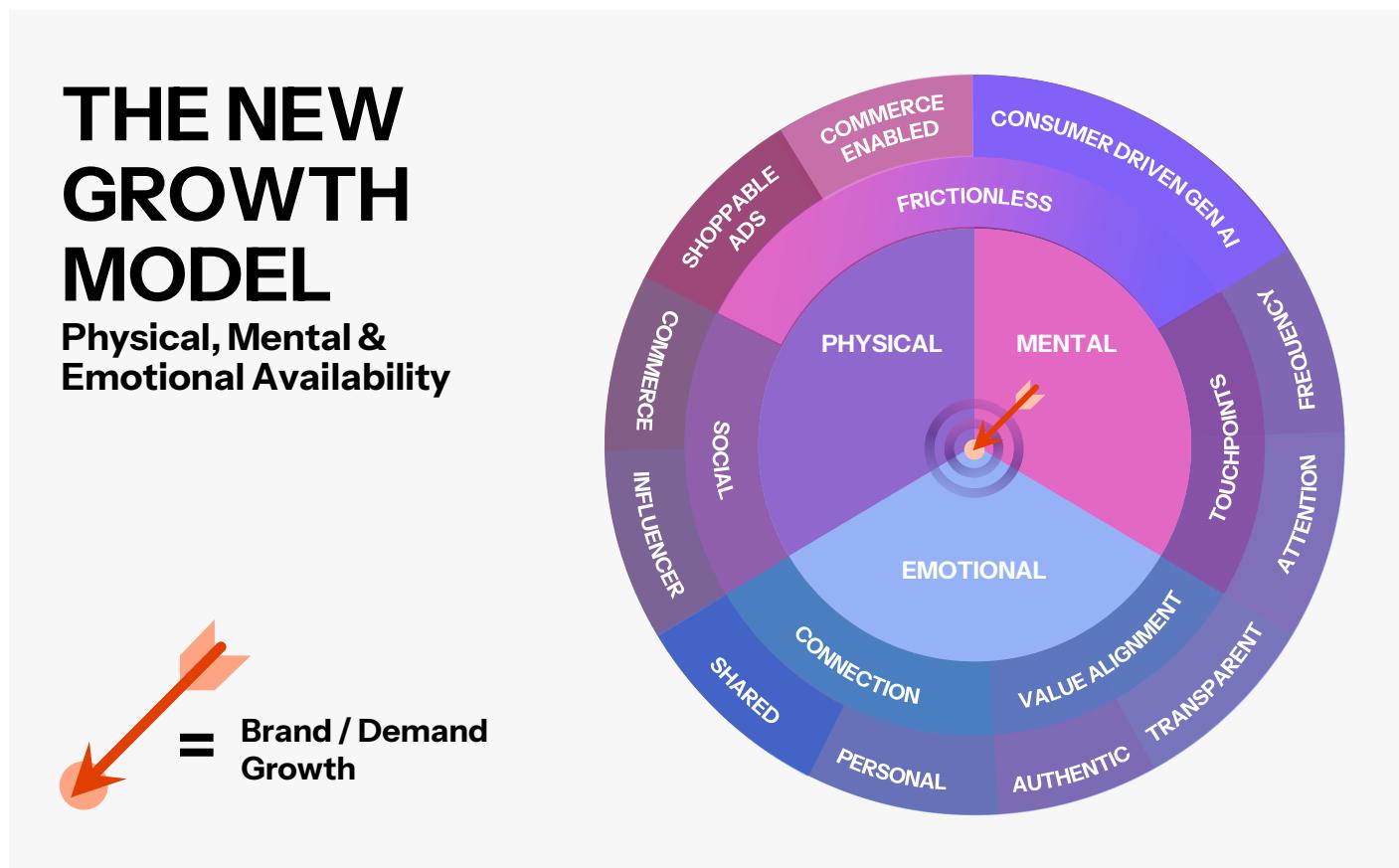


All of these are important elements that act as components of differentiation and shape a brand's image positively or negatively – and in turn influence consumers' overall perceptions of a brand.

The challenge: traditional marketing frameworks have not placed (enough) emphasis on how brands can tap into consumers' emotional availability to grab and sustain consumers' attention, create connection, and increase the likelihood of engagement. Rather, emotional availability may have functioned mostly as an accelerator of consumers' mental availability.

The solution: taken in concert, physical, mental, and emotional availability are the necessary building blocks for brand growth in this complex, competitive, and fragmented environment. Excluding one of these building blocks from an overall marketing strategy is missing the bullseye for long-term loyalty, regardless of whether a campaign's immediate objective is “brand” or “demand” (Figure 25).

Figure 25





06 **Balancing The Role of Machines With the Power of Human Connection**

The Future Of Brand Influence Balances The Role Of Machines With The Power Of Human Connection

All these shifts in the traditional rules of brand growth - where physical availability necessitates more ubiquitous product access, mental availability is a game of cutting through noise and disintermediation, and emotional availability is a new lever to power and capture authentic connection - are coming together to unveil a new marketing reality.

It requires that brands:

Identify new target audiences using a richer palette of inputs, like targeting those most likely to be "movable" in a brand's direction and using advertising as a primary mode to reach and persuade them.

Build new measurement frameworks that allow them to more effectively capture a *brand's* business value over time, and hence, make the business case for meaningful brand investment as a baseline upon which to run direct response campaigns.

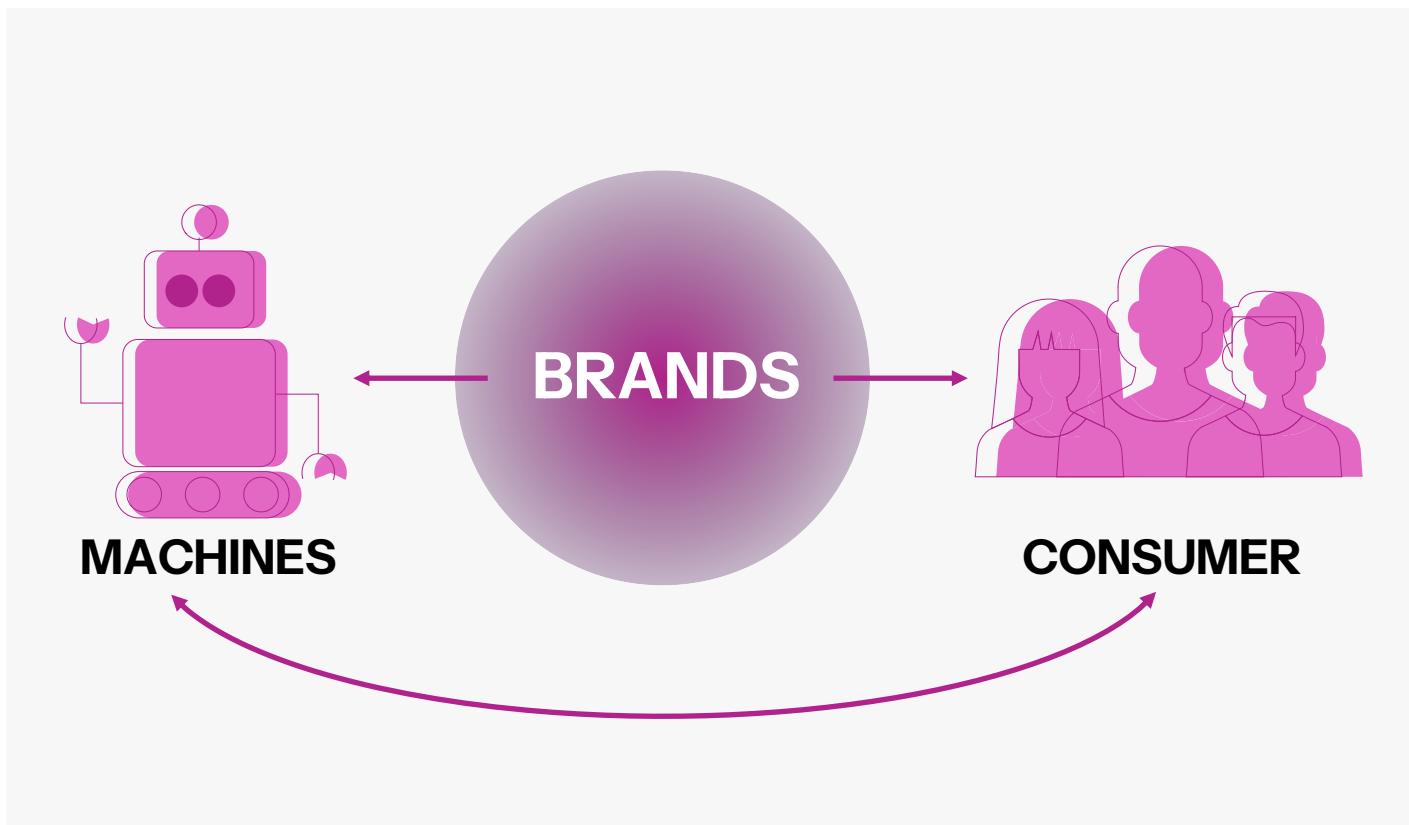
Cultivate a content engine that supports creative novelty, format and message variation, nimbleness, and scalability, with a focus on attributes consumers care about, such as authenticity and transparency.

Rethink their media mix to maximize more than simply reach and frequency (if done with consumer experience as part of the calculus) but also influence.



This shift should be underpinned by a two-fold approach: marketing to BOTH machines and humans in ways that take these new rules and shifts into account.

Feeding both constituencies will create a virtuous cycle for a brand, where discovery, consideration, purchase, and loyalty become a flywheel of continued growth.



Marketing to Both Humans and Machines

Here is the great news. The current media ecosystem offers a myriad of opportunities to create moments of outsized influence with humans and AI alike if you know where to look. Brands should consider these strategic areas of investment to meet both the baseline requirements needed to capture mental availability, tap into emotional availability when it is primed to be high, and benefit from new avenues to deliver on physical availability.

Marketing to Humans Means Tapping into Emotion, Authentically, at Scale

Marketers understand better than most the power of human connection. In the seemingly constant swirl of news that's focused on AI disruption, it's critical we not forget the importance of marketing effectively to *people*.

Leverage Live to Take Advantage of Elevated Consumer Attention, Emotions, and Connection

Today, live experiences do not only mean tentpole events. Live is a much more expansive ecosystem of content, conversation and commerce – happening physically and digitally – in individual moments and across time. It encompasses entertainment, sports, and gaming. It is both polished and produced, and raw, authentic and unvarnished. And importantly, it is about people coming together to be part of a shared experience.

Brands can reap outsized rewards in Live. Not only are ads unavoidable during certain live events like sporting events but also consider these stats: 90% of consumers pay attention to ads during live events, while 50% of consumers say they feel more positive about brands that advertise during big events like the Super Bowl (OMFOBI 2025). But to most strategically participate take advantage of new advancements – for example by marrying live opportunities with the addressability and accountability of programmatic.

Omnicom Media is raising the game in Live for brands in several new ways. As a key example, via a co-development initiative with Disney that enables brands to bid programmatically in real time on high-impact live sports moments – such as tiebreakers, over-time, and first ad pods, enabling brands to appear during emotionally charged, high-engagement moments that boost message receptivity and recall. Reach out to charles.cebuhar@omc.com for more information.



For a much deeper look at the Live opportunity, **read our Rethinking Live report here.**

Invest in Influencers as Authentic Human Brand Ambassadors and Scalable Media Channels

Influencer investment offers a multitude of benefits – gone are the days where they were relegated to simply driving “buzz”. Nearly 60% of consumers tell us influencers can be a one-stop shop for everything they need because they excel at creating authentic, transparent, and community-driven experiences wherever they are. Brands can now leverage influencers as human representatives of the brand while also taking advantage of new planning, buying, and measurement capabilities to support everything from influencer selection to smarter ROI calculations (Omnicom Media Niche and Rising Influencers Report 2025). For example, shift your influencer selection process to make selections not just based on the influencer (and number of followers), but on *the specific audiences who follow them* as well. And take a hard look at social commerce as a sales vehicle as measurement capabilities continue to improve dramatically. The result with new approaches like these? Brands can tap into consumers' mental, emotional, and even physical availability simultaneously.

Influencers have redefined the purchase funnel on social platforms and beyond (think live shopping), with nearly half of social media users saying they've used influencers in their purchase journey.

And their authenticity and relatability deliver a halo effect to brands: two thirds of consumers view the ads/sponsorships that niche and rising influencers take on as authentic. (Omnicom Media Niche & Rising Influencers 2025).



For a deep dive into the **Macro Impact of Niche and Rising Influencers report, go here.**

Omnicom Media is elevating the Influencer opportunity by developing best in class tools, such as our Omni Influencer Discovery Agent which helps teams select influencers based on the actual makeup and characteristics of their audiences rather than just the number of followers potential influencer partners may have. Omnicom Media has partnered with Walmart, Meta, and YouTube to integrate our Influencer Discovery Agent to improve influencer discovery on these platforms. More integrations will be announced at CES 2026.

Additionally, Omni Content Strategy Assistant helps brands' creator partners build more resonant creative designed to drive influence. Specifically, this tool allows creators to surface insights about a brand's audience – as well as cultural trends that are likely to resonate given a brand's specific brief, suitability requirements, and other specifications – that can help hone content development. Contact kevin.blazaitis@omc.com for more information.

Lean into Retail Media to Surprise and Delight Shoppers Throughout Their Purchase Journey

Many brands are faced with limited, disconnected data that challenges them to understand and act on consumer behaviors at relevant stages of the purchase process that could increase the likelihood of positive influence.

Brands can meet consumers' higher-than-ever shopping expectations by tapping into the new connected commerce paradigm, underscored by an investment approach that prioritizes proactive, relevant, and timely communications powered by connected data and incrementality-based measurement.

To do this, brands should leverage retail media networks' deep transactional data, strong search footprint, and diverse media ecosystems beyond the bottom of the funnel. For example, brands can now use retail media data to understand the full funnel business impact of their media investments – from their linear and CTV spend, to programmatic, to retail search. And brands should begin testing shoppable advertising if they have not already yet: it is poised to grow in adoption, format variety, and sophistication, and promises another closed-loop performance opportunity.

Consider that 51% of consumers say they now have more choices than ever before when they are shopping, that 78% of consumers say they expect retailers and consumer brands to have an omnichannel presence, and that 82% of consumers say that either a shoppable ad or an ad from a retail media network has helped them during their purchase journey (OMCC 2024).



For more detail, read out **Connected Commerce report here.**

Omnicom Media has been at the forefront of developing capabilities in connected commerce, including with Amazon, one of the largest retailers in the world. For example, we worked with Amazon to unlock an extended purchase data lookback from 12.5 months to five years, allowing brands to assess a more complete view of long-term customer value at both the product and portfolio level and therefore invest and optimize media in much more sophisticated and nuanced ways. Omnicom Media elevated this capability at Cannes 2025, after unlocking Prime Video insights in AMC. Teams can now track users from first ad exposure through to purchase – and repeat purchase – associated with Thursday Night Football investment.

Treat Search as a Behavior to Meet Consumers Where(ever) They Are, On Their Terms

For more than a year now, Omnicom Media has argued that the act of “searching” goes far beyond the confines of traditional Search (i.e., Google). Consumers now search in many other places – from social platforms, to starting shopping searches on retail sites, to using OEMs’ (CTV) search functionality to discover content. Despite so much choice, consumers are adept at choosing the right search environment for their specific need or needs. By understanding how target consumers are searching, and then investing in those search environments accordingly, brands increase the likelihood of being where their consumers are in moments of interest and can capitalize on these new touchpoints of influence.

Our research shows that 70% of consumers say they are not overwhelmed with the plethora of search options, and 54% note there is no “one-stop shop” for their search needs (OMFOS 2024).



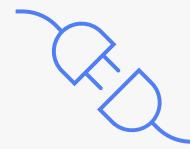
For consumer insights on search behaviors and strategies across media channels, **read our Future of Search report here.**

Omnicom Media has been actively working with partners on an ongoing basis to develop capabilities that equip our clients with outsized advantage in this new search landscape. Omnicom Media and TikTok collaborated to develop a capability that identifies search trends in real time based on organic search queries within TikTok over a defined period (See Figure 26).

These insights are integrated into our aforementioned Omni Content Strategy Assistant helping our clients’ selected creators to unlock TikTok-optimized content recommendations that resonate with current platform trends. Additional Content Strategy Assistant enhancements will be announced at CES 2026. Omnicom Media and Google are also committed to advancing capabilities as the paid search landscape continues to evolve and have formed a Future of Search Partnership.

Figure 26

Motivation Insight



As a channel environment, **TikTok** is activating a dimension called **Psychological Richness**, which creates meaning through emotional extremes – both highs *and* lows.

This means that a calming and soothing ad placed on TikTok might **actually disconnect psychologically**. This runs the risk of being less effective or even jarring – potentially backfiring by harming brand trust.

Source: Hive Science

For creator and social search capabilities, reach out to kevin.blazaitis@omc.com of Creo for more information. For more information on Omnicom Media and Google-related capabilities, reach out to Michael.sondak@omc.com.

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Marketing to Machines Means Building Approaches Today To Prepare For What's Next

Now is ALSO the time to understand the relative impact that new AI-powered technologies like generative platforms and AI agents are having on your prospects' and customers' ability to find you, their likelihood to engage, and ultimately purchase.

Utilize Generative Engine Optimization to Prepare for the Growing Impact of AI on Consumer Decisions

With GenAI Search now representing as much 23% of total search queries globally (Omnicom Media GEO 2025), it is important that brands begin to engage in these environments. Notably, these GenAI queries occur in places where advertising is either nascent or absent entirely (at least today).

Generative Engine Optimization (GEO) is a new discipline and framework designed to help a brand prepare and respond as the shift toward GenAI conversations continues to grow, and as the addition of commerce capabilities spells real-world implications on consumer purchase patterns still yet to be realized.

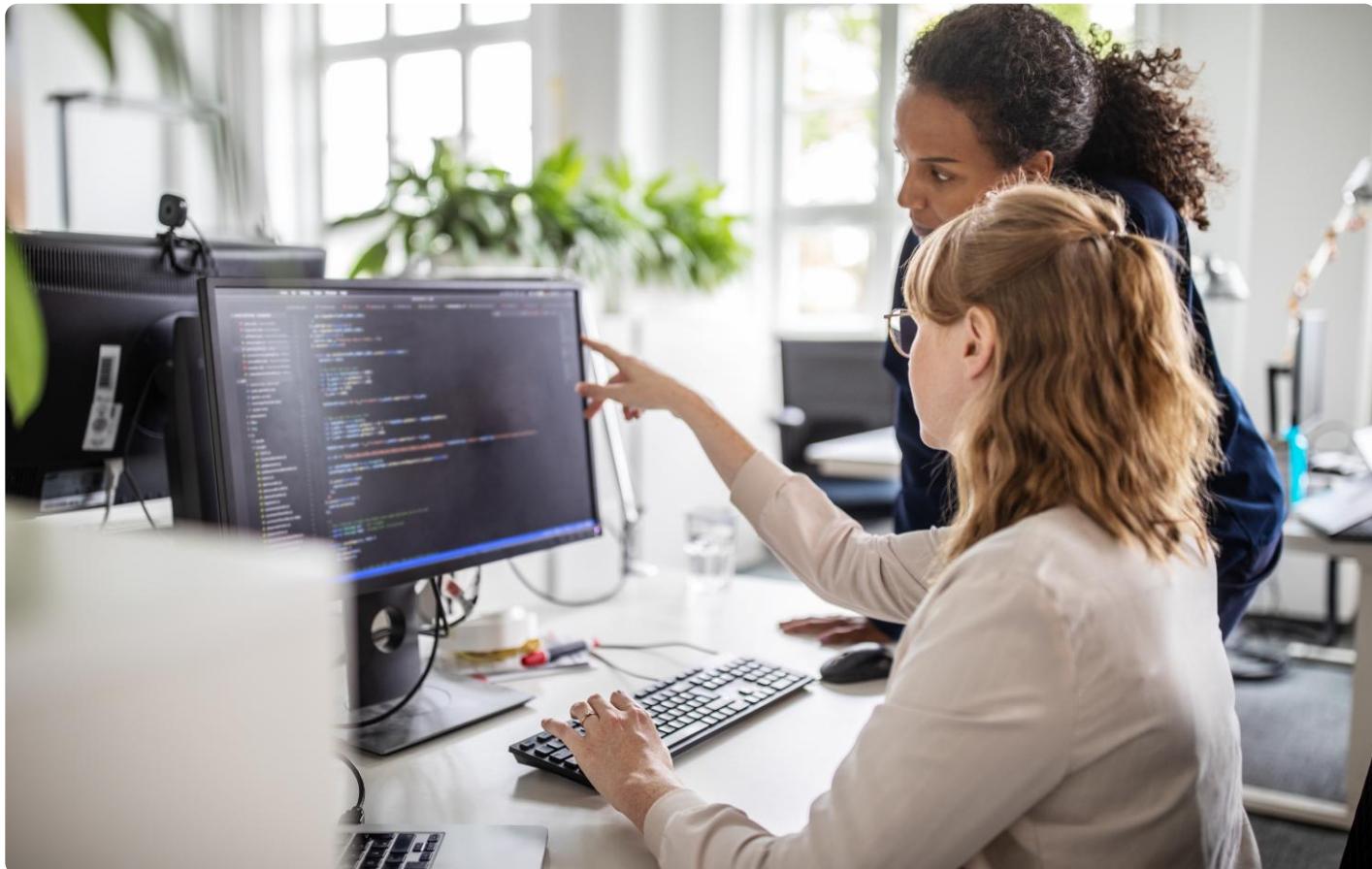
For additional context, note that 75% of consumers say they use some form of AI and 46% of those do so daily. And four-in-ten of our survey respondents said they have shifted most of their searches to GenAI Search environments (Omnicom Media GEO Research 2025).

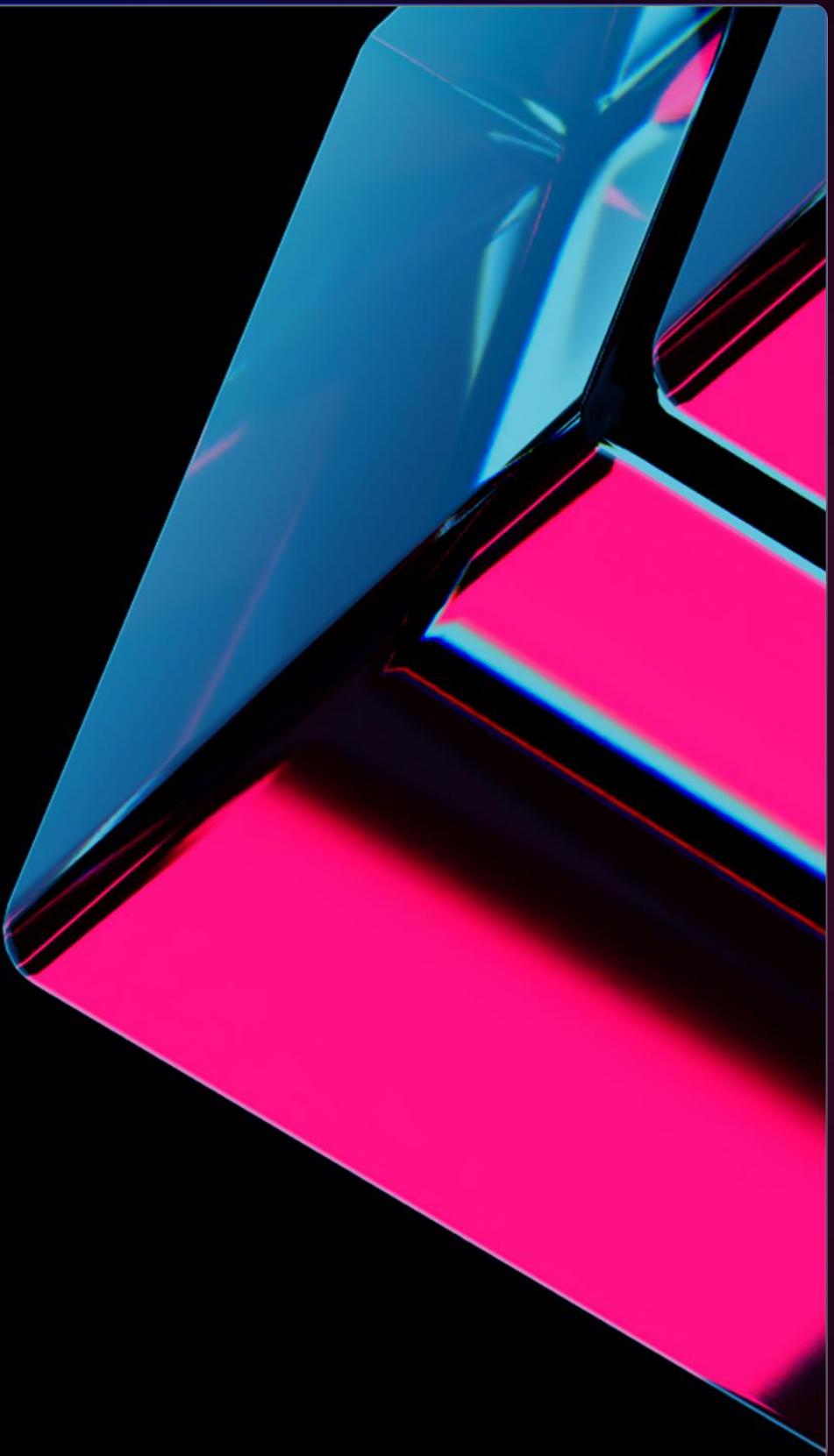


For more on **GenAI Search** and **GEO**, please read our report [here](#).

Omnicom Media has developed a full solution, AI Optix, to help brands on this journey. A first step we recommend is an assessment of how a brand(s) is being represented by LLM's today.

We have also leaned into building tools in partnership with major platforms to round out brands' approach. For example, we launched our Next Gen Search Agent, an AI-powered tool leveraging AI technology to bring next generation insights as search queries evolve, in partnership with Google. Enhancements to be announced at CES 2026. For more information on these co-developed solutions and also our own GEO solution, AI Optix, please reach out to michael.sondak@omc.com.





07 Methodology

Methodology

Omnicom Media Intelligence: Who We Are

Omnicom Media Intelligence (OMI) keeps clients up to date on industry developments with thought leadership featuring actionable insights, predictive analyses, and prescriptive recommendations. The team is comprised of Marketplace Intelligence, Primary Research and OMG Signal, our proprietary consumer survey tool. Alongside the comprehensive thought leadership pieces we produce, including Connected Commerce, Future of Search and more, we oversee major programs and initiatives of note including CASA (Council on Accountability and Standards in Advertising), which advocates for and tracks capabilities improvements in major media channels by working directly with the largest media partners to drive improved capabilities, increased transparency, and cross-partner standardization.

Omnicom Media Intelligence publishes more than 70 pieces per year on a variety of topics including analysis of pricing trends, changes in consumer media preferences, and technical evolutions in advertising. Omnicom Media Intelligence also works across the advertising industry to help improve our sector as a whole. Recently we initiated and led the steering team for the MRC's new Auction Transparency Standards and also submitted proposals to the IAB Tech Lab to drive up the scale of post-auction discounts.



Cited Research and Thought Leadership

Omnicom Media Proprietary Research (online surveys via Signal)

Future of Brand Influence: The New Brand Growth Model for Maximizing Impact and Outcomes
Surveyed 1,000 U.S. adults 18-72 during 10/15-10/20/2025

Why Frequency Matters: Combatting Negative Reach

Surveyed 497 U.S. adults 18-65 who have a streaming service during 8/1 - 8/4/2025

Generative Engine Optimization (GEO): The New Paradigm for Discovery in the GenAI Era

Surveyed 2,404 U.S. adults 18-72 during 7/21-7/31/2025

Consumer Response to the Current Economic Climate

Surveyed 993 U.S. adults 18-72 during 5/2-5/4/2025

Rethinking Live: Think Beyond the Moment to Maximize Investment Impact

Surveyed 1,479 U.S. adults 18-72 during 3/25-4/1/2025

The Macro Impact of Niche and Rising Influencers

Surveyed 1,235 U.S. adults 18-72 during 1/23-1/29/2025

Future of Search: A Behavior Not a Channel

Surveyed 1,419 U.S. adults 18-65 during 9/19-9/25/2024

Connected Commerce

Surveyed 999 U.S. adults 18-65 during 4/23-4/30/2024

Methodology



Cited Research and Thought Leadership

Q Cultural Intelligence

To track cultural changes, we leverage Q, Omni's AI-powered cultural intelligence application, which analyzes over 350 million signals from 140 countries. These signals are mapped against our proprietary trend framework, The Elements of Culture, to reveal key patterns of change. For this piece, our Q system created a zeitgeist map (pictured in the body of the POV) by analyzing over 734,343 "signals" (articles, blog posts, patents, academic journals and more) that have been posted over the past 2 years the future of influence. We focused on top elements of culture (EoCs) that pop based on this query. These "EoCs" shape the major cultural movements occurring on the topic of influence and provide insight into key categories of inquiry.

Hive Science Insights

Hive Science has developed technologies that "see" predictive patterns that are unique to a brand's products, enabling brands to understand and activate what Hive Science refers to as Psychological Fit. This is designed to help allows brands more intentionally design for trust and deeper emotional connections.

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