

# AlixPartners

The three AdTech  
growth shifts that  
matter in 2026

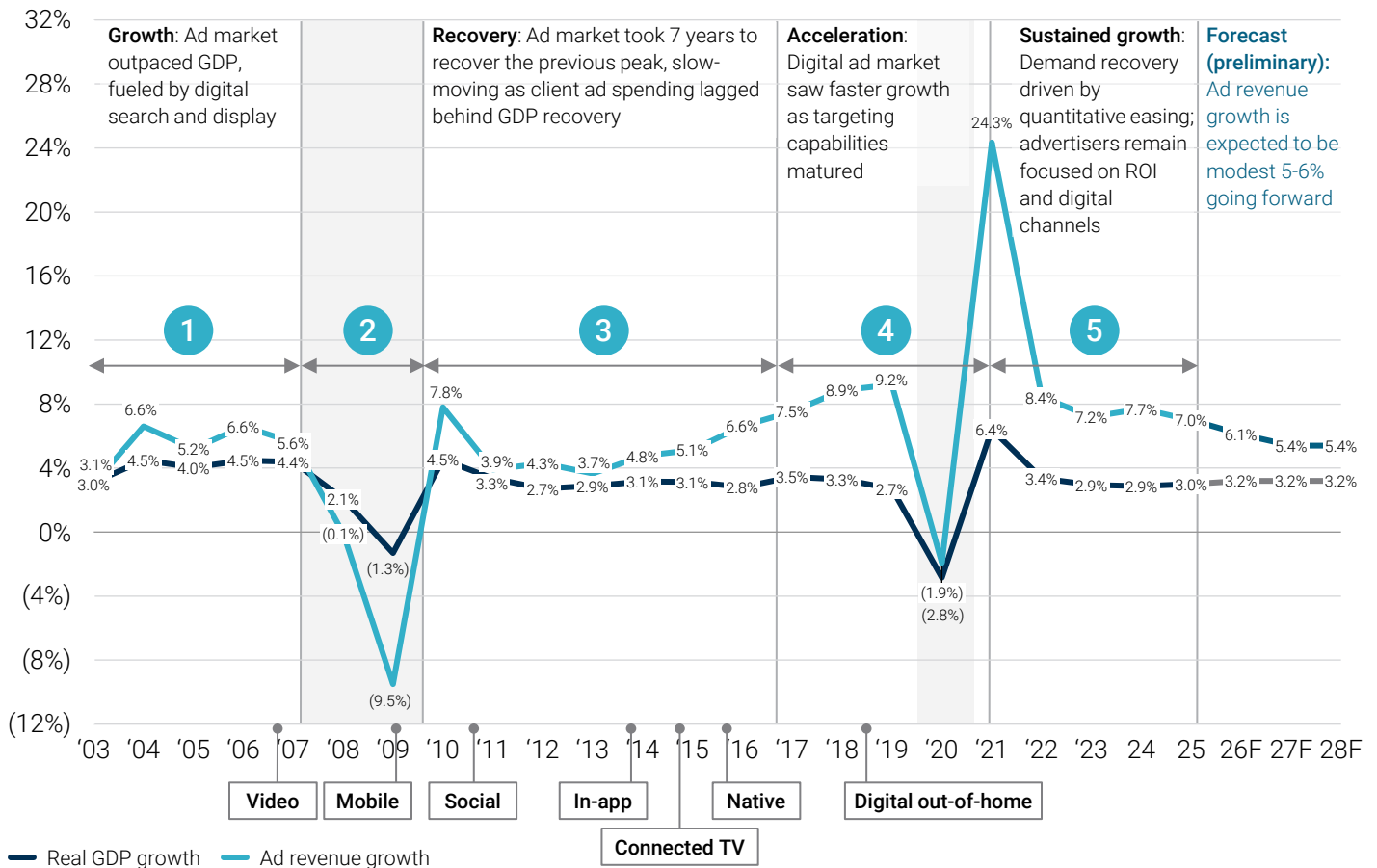


# How to unlock true value by shifting from “We have AI, CTV, and open-web scale” to “This is where we win and drive growth”

AI’s overhaul of the tech industry will leave no stone unturned, and the AdTech sector is feeling the effects. AI, connected TV (CTV), and privacy-safe open-web buying are now table stakes, not differentiators. But as they converge within the advertising ecosystem, not every company is utilizing these tools to drive actual value.

According to our analysis, nearly one in three U.S. digital ad dollars will go to CTV and premium online video this year, an increase from 27% in 2025 ([per IAB](#)). Digital spend is still growing, but incremental dollars are flowing to platforms that prove outcomes and simplify buying, not just those with the most connected surfaces. It’s about doing less and going deeper—hyper-targeting media spend towards where buyers are investing and strategically leveraging those channels to maximize margins. As the economy faces continued pressure and limited growth, advertising spend is not expected to increase significantly in the near term. Instead, ad spend is likely to remain closely correlated with GDP growth trends.

## Global advertising revenue growth and world real GDP by year



Source: International Monetary Fund (IMF) for real GDP forecast; World Bank for real GDP actuals; AlixPartners analysis

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The real separation in 2026 and beyond could come down to three shifts, not three new trends:



**AI** is shifting from a tool that optimizes ads and ad placements to becoming the core engine for ad planning, targeting, and measurement across the digital landscape (search, social, open web, CTV, retail media, and more). Agentic AI allows companies to micro-segment via ongoing behavioral analysis and optimize channel strategy by assessing real-time performance.



**Open web** is shifting from an emphasis on impressions, views, and reach (seen more as vanity metrics) to fewer but higher quality placements that target granular customer segments.



**CTV** is shifting from another channel to the default TV/video line item for advertisers, with sustained double-digit growth but heavy competition in a saturated market.



Shift

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# From “We use AI everywhere” to “AI tells us what to fund and what to cut”

Previously, ad placements were largely automated. Companies chose websites and mobile screens with the right target audiences, paid for real estate, and software sorted out which ads went where.

But now, AI is redefining the process by which ads are created and placed. An airline could, hypothetically, see if a potential customer is asking ChatGPT about comfortable seats or environmental concerns, and tailor ads with custom messaging based on AI agent conversations.

While most platforms already use AI in bidding for ad space, in 2026 we'll see a further shift whereby AI goes from an execution tool to the portfolio brain that oversees which audiences, channels, and ad tactics deserve dollars.

## What's working

- ✓ Using AI to score and prioritize segments, creative, and supply paths based on predicted business outcomes, not just clickthrough rate (CTR)
- ✓ Running AI-driven “keep/grow/kill” reviews on tactics and products to reallocate spend and R&D faster
- ✓ Selling named AI products—e.g., “Optimization Layer” or “Outcome Audiences”—with clear commercial impact and proof

## What's not working

- ✗ Generic copilots and auto-bidding without net revenue retention (NRR) or a margin story behind them
- ✗ Roadmaps and trading decisions that look the same as 2-3 years ago but with “AI” labels added
- ✗ Black-box models buyers must take on faith

## Immediate priorities

Put AI in front of management:

Decide three places where AI will explicitly change what you fund in 2026, not just *how* you buy

Make 1-2 AI products commercially visible—with clear pricing, case studies, and proven lift—while leveraging AI to drive operational efficiency and effectiveness

# Open web from “We have massive reach” to “We monetize fewer, better, more transparent paths”

Selling at open-web scale is nothing new; buyers know they can buy trillions of impressions. But now, they are shifting from a focus on impressions and views and towards optimizing every dollar.

In 2026, advertisers will embrace more curated, high-quality, privacy-safe routes that protect ad performance and margins. When given the choice between spending the same amount of money for one million random views, or 100 views by ideal target customers, companies are choosing the latter.

## What's working

- ✓ Curation as a product: Move beyond bundling to curate the right mix of marketplaces that maximize ROI—anchored in quality, attention, and outcomes, not formats
- ✓ Privacy-first by default: Clean rooms, first-party IDs, and consented integrations baked into core offerings, not side projects
- ✓ Surfacing supply paths, quality scores, and economics in the user interface so traders can choose fewer, better pipes

## What's not working

- ✗ Optimizing for scale and impressions over quality (such as chasing long-tail inventory to hit volume targets which dilutes performance, transparency, and take rate)
- ✗ Treating fraud/brand safety as a “check-the-box” item rather than performance levers tied to ROAS and margin
- ✗ Relying on opaque identity and supply paths that may work in the short term but lack transparency, durability, and regulatory defensibility

## Immediate priorities

Quality over quantity:

Identify 3-5 curated/quality paths to grow and 3-5 legacy paths to actively wind down

Report margin and performance by supply path to your own leadership as a first step

Reallocate spend toward a focused set of high-performing, curated supply paths

Shift

3

## CTV from “We sell access to our streaming inventory” to “We are the converged video spine”

First advertisers fawned over the internet, social media, and mobile apps. Now their obsession is CTV.

The winners in this space are going a step further than simply integrating ads into the TV experience—they’re embedding content within experiences so seamlessly it doesn’t feel like an ad at all. In 2026, the major shift is from selling CTV as a channel to owning converged video planning and ad performance across CTV, online video, and even social media.

### What’s working

- ✓ CTV + web video sold as one plan: Unified frequency, guardrails, and reporting where privacy rules allow
- ✓ CTV tied to commerce, retail media, and attention metrics so it competes with performance budgets, not just awareness
- ✓ Operational simplicity: Standardized deals and workflows so CTV doesn’t feel like a bespoke project every time

### What's not working

- ✗ “We have CTV too” as another line item, with separate teams, budgets, and reports
- ✗ Selling raw streaming inventory without a reach, attention, sales story, or clear ROI
- ✗ Opaque reselling and daisy-chained paths that scare off sophisticated buyers

### Immediate priorities

Decide if you will be a video spine or a CTV add on

Define 1-2 converged video products that bundle CTV + web under a single outcome metric

Commit to 1-2 tangible steps to simplify CTV buying (e.g., standard package, service-level agreement on launch times, one reporting view, real self-service capabilities) that make performance-focused CTV easier to transact and measure

# The path forward



## AI

From feature  
to funder

It's not "Do we use AI?" It's "How can AI guide smarter decisions and help us invest in what works best?"



## Open web

From reach  
to routes

It's not "How big is our footprint?" It's "Which 20-30% of supply paths drive most of our performance and profit—and are we doubling down there?"



## CTV

From new  
line item to  
backbone

It's not "Do we have CTV?" It's "Can we deliver a converged video solution that drives measurable performance and earns sustainable and scaled budgets?"

## **You already play in AI, open web, and CTV.**

The question for 2026 and the immediate future is where you choose to sharpen the edge—and how quickly you can demonstrate impact across your revenue mix, NRR, and margins.

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## About us

For more than forty years, AlixPartners has helped businesses around the world respond quickly and decisively to their most critical challenges—circumstances as diverse as urgent performance improvement, accelerated transformation, complex restructuring and risk mitigation.

These are the moments when everything is on the line—a sudden shift in the market, an unexpected performance decline, a time-sensitive deal, a fork-in-the-road decision. But it's not what we do that makes a difference, it's how we do it.

Tackling situations when time is of the essence is part of our DNA—so we adopt an action-oriented approach at all times. We work in small, highly qualified teams with specific industry and functional expertise, and we operate at pace, moving quickly from analysis to implementation. We stand shoulder to shoulder with our clients until the job is done, and only measure our success in terms of the results we deliver.

Our approach enables us to help our clients confront and overcome truly future-defining challenges. We partner with you to make the right decisions and take the right actions. And we are right by your side. When it really matters.

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