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Rapid Response

AI Dissolution

Building new assets and protocols to thrive in an AI dominated ecosystem

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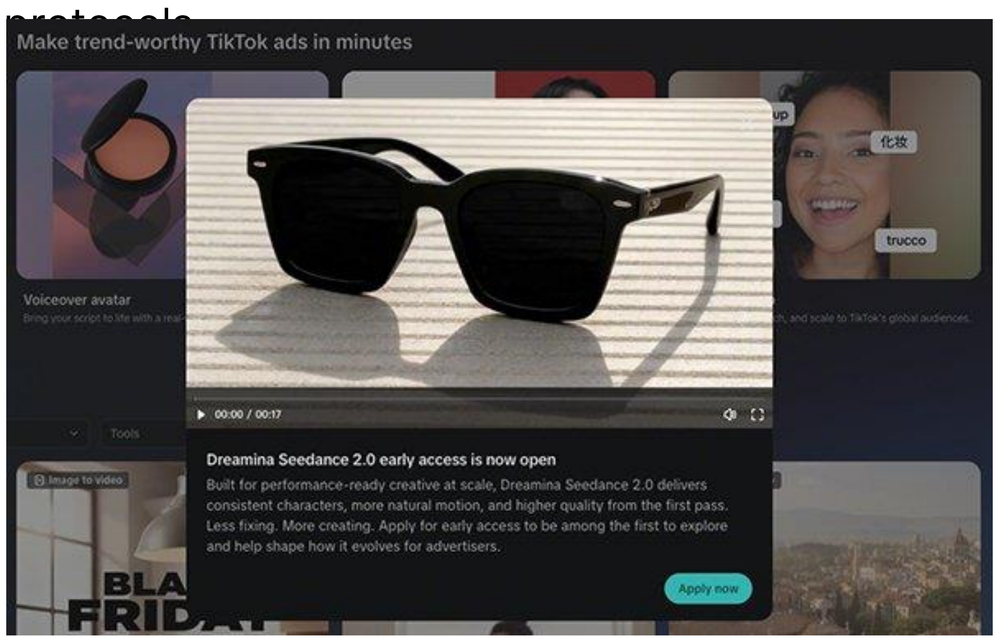
WE *Create* WHAT'S NEXT

Dissolving Boundaries in Media

In recent weeks, we have covered the structural change in global advertising markets and processes driven by AI. More sophisticated models and applications are dissolving many of the boundaries that defined modern media, enabling value to flow more freely between entities. Brands are discovering new ways for net value to flow to them.

We see evidence of this in multiple product updates, policy shifts, new capabilities and protocols. Impacts are seen across creative and content production, outcome-based measurement, consumer discovery and buying protocols.



Creative production has moved inside the buying interface. For example, TikTok's Symphony Creative Studio now runs on Dreamina Seedance 2.0. It generates polished videos with synchronized audio from a text prompt directly inside the same TikTok Ads Manager where targeting and budgets are set, and is now available globally to advertisers.

Google has consolidated its creative controls inside Demand Gen, automating video resizing and image extraction from landing pages.

Amazon has rolled out professional-grade AI video generation through its Creative Studio to many new formats across global markets.

Meta is likely the furthest along this path with ad generation, ad retrieval/decisioning and bid optimization all connected. AI services enabled by Andromeda, Lattice and GEM are being offered to a wider range of businesses, further driving competition for inventory.

The implication is not merely that production timelines compress from weeks to hours. There is a more interesting structural consequence, in that creative is no longer a separable activity that feeds into a media plan, it is a workflow inside buying tools.

The point of difference on the buy side is less about orchestration of the previously hard creative, media and measurement workflows, instead a greater range of assets and protocols need to be managed to derive competitive advantage within, and adjacent to, platform tools.

Measurement and Discovery

Measurement is being routed through predictive models or pushed entirely outside the ad-stack.

Nielsen launched Predictive Sales Lift at POSSIBLE in Miami this week, forecasting incremental revenue from in-flight campaigns using a model trained on hundreds of historical Nielsen ONE Ads campaigns and designed to flag underperformance early enough to reallocate spend mid-flight.

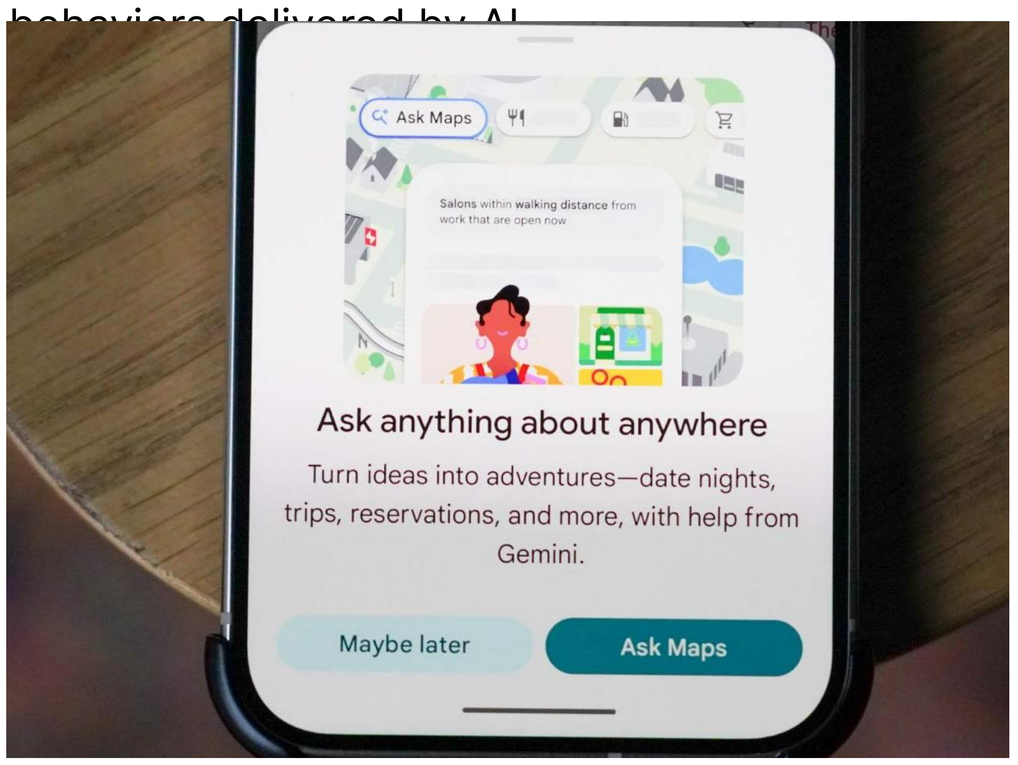
Whilst Google deprecated Display and Video planning inside Performance Planner on March 9, removing impression share metrics entirely and locking out plans built on those metrics from being viewed or edited.

The rationale is alignment with conversion-focused automation, the removal of impression-level visibility means the layer where advertisers used to make trade-offs between reach and outcome is lost.

By early last year, open web display impressions are were around 11% of Google's display business versus 40% in 2019 as a greater range of inventory dissolves into Performance Max.

Consumer product discovery is dissolving into recommendation within increasingly personalized AI models.

Search has already shifted from being a channel to a behavior, now a wide range of intent driven behaviors delivered by AI.



Google's Ask Maps, launched in March, is a Gemini-powered conversational layer that reads Business Profile data, reviews, photos, services and hours to generate a recommendation in response to a natural-language query. Obviating the need for ten blue links. The Business Profile has become the structured data layer feeding Gemini, Search, and Maps simultaneously.

Google is also placing new protections, such as policing bad faith reviews and enabling more good faith contributor updates.

All of which brands must understand and engage with to deliver growth.

Protocols Reduce Buyer and Seller Distance

AdCP is an open advertising protocol designed to let agents discover inventory, execute buys, distribute creative and report outcomes across different partners through a common interface.

As reported in Digiday and AdExchanger, Omnicom revealed during Q1 earnings reporting that it has already run live buys for several clients through the agentic framework, with the stated aim of shortening the path between advertiser and publisher and moving more spend into working media.

This is not just another efficiency story, or simply that AI can buy ads faster. It is that large buyers are now turning the transaction itself into software that is machine-readable, negotiable and direct.

Programmatic has been using AI to optimize campaigns for many years. The real shift is that AI gives the buys side a mechanism to the shape of the market itself.

If an agent can interpret a brief, discover supply, compare options, negotiate terms, execute a buy and reconcile outcomes, then much of what sat between buyer and seller is seen less as indispensable infrastructure and more like compounding friction.

At the same time, the IAB Tech Lab's January 6, 2026 agentic roadmap is approaching the challenge from the standards side. Not rebuilding digital advertising from scratch, but extending the existing languages of OpenRTB, AdCOM and OpenDirect with agentic layers such as MCP, Agent2Agent and gRPC.

Updated in March 2026 as the Agentic Real-Time Framework, the logic is pushed further, treating ad systems as orchestrated agents operating under declared intents and strict performance constraints.

These protocols do not just make workflows faster; they make markets more legible. Once buyer and seller systems can talk in a shared grammar, advantage shifts away from whoever owns the dashboard and toward whoever can expose the cleanest, richest, most trusted and privileged signals to agents.

Therefore, the commercial moat shifts from audience scale, to machine readability.

How to Respond

As platform AIs dissolve previous structures, the mechanism of competitive advantage changes.

Optimizing harder against any single platform's logic is a depreciating asset because the algorithms are tending towards fewer levers to pull and more brands to bid against.

The key question is what are the assets, structures and permissions brands can build that survive this dissolution.

For instance, these three answers are taking shape;

- Distinctive brand assets. Amplified Intelligence research shows attention-driven memory encoding can happen in as little as 1.5 seconds when distinctive assets are present, against the 85% of digital ads that fail the 2.5-second threshold entirely. Branded fluency is the only creative input that performs across optimization surfaces.
- First-party data and payment-verified attribution: measurement infrastructure that doesn't live inside the platforms whose performance it measures.
- The third is the suite of recommendation assets, to build presence in the data substrate AI agents read from, so that when the conversational layer takes over discovery, the

Together, they describe the new architectures brands need to own that operate in parallel to the platform AIs.

Growth will come from effective utilization of the platform AIs, but within a diverse ecosystem of growth drivers and inventory mediated through the assets that the brand can leverage, from distinctive, unique and defendable brand assets, to a network of stakeholders, independent measurement on the brand's terms. All tied together through advertising and commerce protocols that influence market dynamics. These approaches will make a brand legible to today's systems and whichever AI surface comes next.

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