

 GROWTH CARTOGRAPHY · FIELD GUIDE 002 · AGGREGATED

THE MODEL DECIDES IF YOU EXIST.

Marketing inside the aggregated market: three platforms that price your reach, and the answer layer arriving above them that decides whether you appear at all.

THE 2026 FORECAST: NOT A MARKET, A TOLL SYSTEM

62.3%

of worldwide digital ad spending
goes to just three platforms: Meta,
Google, Amazon

\$243.5B

Meta's forecast ad revenue,
passing Google (\$239.5B) for the
first time

 PART ONE

THE HALF YOU LIVE IN

Rented reach, priced by the landlord: what the platforms' own numbers say about who controls distribution.

01

ORGANIC REACH: THE AUDIENCE YOU BUILT IS NOT A CHANNEL

1.65%

of followers see the average
Facebook page post organically.
Instagram: 3.50%

0.3%

of TikTok views come from the
Following feed. The For You
algorithm delivers 85.1%

■ SO YOU PAY. AND THE PLATFORM SETS THE PRICE, QUARTER BY QUARTER

+9%

Meta's average price per ad, full-year 2025, while impressions grew 12%

\$196B

Meta's 2025 ad revenue, up 22% in one year. Price, volume, and placement: all their levers

“

You're a business, you come to us, you tell us what your objective is, **you connect to your bank account**, you don't need any creative, you don't need any targeting demographic, you don't need any measurement, except to be able to **read the results that we spit out.**

MARK ZUCKERBERG ON THE END STATE OF META ADVERTISING · STRATECHERY INTERVIEW, MAY 2025

SOURCE · STRATECHERY (BEN THOMPSON), MAY 2025 · QUOTE VIA MI3

 PART TWO

THE HALF ARRIVING NOW

The same machine, one layer up: a model now stands at discovery itself, before a single ad dollar is spent.

02

THE ANSWER LAYER ABSORBS THE CLICK

~60%

of searches now end without a click
to any website

~1%

of users click a source cited inside
an AI summary when one appears

■ THE WRECKAGE IS MEASURABLE, AND THE FIGHT IS IN COURT

-33%

global publisher traffic from
Google, in the year to November
2025

85%

of brand mentions in AI answers
come from third-party pages, not
your own domain

■ RECALIBRATE FOR THE AGGREGATED MARKET

WHAT YOU RENT VS WHAT YOU OWN

RENTED FROM THE AGGREGATOR

Reach the model prices

Followers the feed ignores

Rankings that reset weekly

Impressions

An ad account

OWNED BY THE BRAND

→ An identity the model recognizes

→ A corpus machines can retrieve and cite

→ Verifiable ground truth, kept fresh

→ Citations and AI share of voice

→ An interface other machines can query

■ THE CMO ACTION PLAN

SIX MOVES FOR THE AGGREGATED MARKET

01

Build the owned corpus

One structured, verifiable body of answers about what you sell, priced, sourced, and current.

02

Structure it for machines

Schema, clean headings, stable URLs. Retrieval favors content built to be quoted.

03

Keep it fresh

Stale pages lose citations. Treat the corpus like a product with a release cycle, not a brochure.

04

Earn off-site validation

Most AI mentions come from third-party pages. Reviews, communities, and press feed the model's trust.

05

Measure AI share of voice

Track how often models mention and cite you. It is the new distribution metric, and it moves weekly.

06

Expose a queryable interface

Let models ground answers in your verified data at query time, so they cite your facts, not a summary of you.

■ EVERY FIGURE, ONE PLACE TO CHECK

SOURCES & METHODOLOGY

01

eMarketer · 2026 digital ad forecast

62.3% triopoly share; Meta \$243.5B passes Google \$239.5B (forecast)

emarketer.com ↗

03

Socialinsider · 2025 reach benchmarks

Organic reach per post: Facebook 1.65%, Instagram 3.50%

socialinsider.io ↗

05

Pew Research Center · AI summaries study

58% hit an AI summary in a month; ~1% click a cited source

pewresearch.org ↗

BORROWED FRAMEWORKS · CREDITED IN FULL

A

Aggregation Theory and the May 2025 Zuckerberg interview are Ben Thompson's, via [Stratechery](#).

02

Meta · Q4 and full-year 2025 results

Ad revenue \$196.2B (+22%); price per ad +9%; impressions +12%

prnewswire.com ↗

04

quso.ai · TikTok traffic-source study

31,059 posts: For You 85.1% of views, Following feed ~0.3%

quso.ai ↗

06

Bain & Company · zero-click research

~60% of searches end without a click; organic traffic down 15-25%

bain.com ↗

B

Publisher-traffic decline (~a third, year to Nov 2025) via [Reuters Institute / Chartbeat](#); third-party citation share via [AirOps](#); Andromeda scale via Engineering at Meta.



GIVE THE MACHINE SOMETHING OF YOURS TO FIND.

You cannot own the model or the auction. You can own who
you are and what you know, in a form machines can verify.
Next in the series: Decentralized, then Autonomous.

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EVERY FIELD GUIDE, THE DAY IT DROPS

BUILT ON THE FDI SLIDE SYSTEM

Pressure-test the thinking in working code → github.com/jrattlee/FDI

SOURCES

CTA