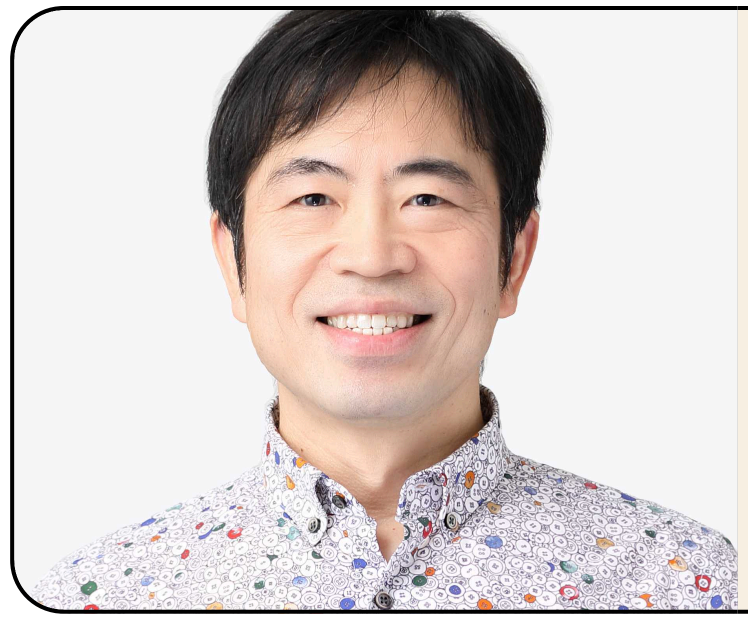
DENTSU CREATIVE

GENERATIVE REALITIES

DENTSU CREATIVE TRENDS 2026



“We see a new balance emerging between acceleration and deceleration. People crave both the hyper-real and the handmade, the digital and the deeply human. Here lies the tension, and the opportunity for brands, at the heart of 2026. Amidst the conflicting frictions, diverse fandoms that had previously remained unseen came to light. With diverse creative talent with deep passion across various fields, we will win the algorithm.”

YASU SASAKI | GLOBAL CHIEF CREATIVE OFFICER, DENTSU

“Artificial Intelligence is evolving faster than any technology before it, but human creativity remains the constant. The most successful brands in 2026 will be those that blend technological intelligence with emotional intelligence, pairing efficiency with empathy and innovation with imagination.”

ABBEY KLAASSEN | GLOBAL BRAND PRESIDENT, DENTSU CREATIVE

“Within our report we explore both the trends that rise and fall at the pace of a prompt and the timeless human truths that simmer beneath the surface. Some of those trends may seem frivolous or faddy at first glance - adult collectibles or daytime coffee raves - but speak to a profound human need for connection, comfort and community.”

PATS MCDONALD | GLOBAL CHIEF STRATEGY OFFICER, DENTSU CREATIVE

GENERATIVE REALITIES EXPLORES THE IMPLICATIONS OF A WORLD WHERE IDEAS IMPACT CULTURE AT THE PACE OF THE PROMPT, AND TRENDS COLLIDE, COMBINE AND REGENERATE AT THE SPEED OF THE FEED.

In any trends report, there are causes and there are symptoms. Or as we like to frame it, there are things that are trending, things that are timely, and things that are timeless. In a world where trends ebb and flow at the speed of the algorithm, it can feel impossible to keep up. No sooner do you know your Labubu from your delulu, your soft clubbing from your sauna raves than the feed moves on. The rise of Generative AI and the algorithm's hunger for fresh content create an ever-faster cycle of content creation, mimicry and memeification. It can be challenging to separate signal from noise.

In that context, some trends are easy to dismiss as fads, frivolities or fever dreams; from luxury soft toy collections to pickle obsessions, $100 lipsticks to AI mantras. Indeed, with the rise of adaptogens and AI-enabled "hallucinations" it can feel as if we are living in surreal times, where there is no longer any disconnect between imagination and experience. Yet we believe there are some profound, underlying social shifts and tensions that bubble to the surface in these memes and moments. The trends (or symptoms) may change, but the fundamentals are vital to understand. The cost-of-living crisis continues to move traditional adult milestones beyond the reach of younger generations, leading to indulgence in collectibles and investment in fandoms.

A decades-long decline in our sense of social connectedness and the availability of third spaces has sparked an urgent desire for new ways to come together around shared hobbies and interests. These two macro themes come together in a shift towards new spaces and places to socialize; daytime raves and chess clubs fulfil a need to connect, a desire for healthier alternatives to alcohol and a more affordable experience.

The same profound longing for connection fuels increasingly complex relationships with technology. On the one hand intense parasocial relationships with chatbots and virtual influencers, on the other a desire to embrace slow, considered content and the analog technologies of older generations. The trend towards 90s nostalgia speaks both to a yearning for a shared cultural context and a belief that things were simpler, more optimistic and more joyful way back when.

That desire for certainty and belonging also fuels the resurgence of traditional values and a return to religion and spirituality. The comfort of rituals and the notion of elixirs (as well as the desire to minimize cost and waste) powers a fascination with fungi, fermentation and pickling.

While the climate crisis has featured less prominently on brands' agendas in 2025, we see a profound desire to reconnect with nature and to shift beyond the city with climate anxiety and resilience perhaps lurking behind this movement. An ambivalent attitude to wellness culture is also making itself felt; while sober-curious lifestyles are more prevalent, and the super-rich pursue extreme longevity, we also see the resurgence of alcopops, tanning and quick-fix appetite suppressants. Some planning to live forever, others indulging like there's no tomorrow.

Bubbling alongside these macro themes, we see trends that are a more direct response to the modern media landscape, the power of the algorithm and the shift away from shared viewing experiences. Perhaps most strikingly, we see a desire for less of the same. An anti-algorithm movement is building in fashion, in dating, and in culture more broadly as consumers tire of a sea of easy, polished sameness and seek out flaws and friction.

Within this swirl of trend and counter trend, we identify five macro themes for 2026 and beyond, each with three subtrends, unpacked across those key dimensions of trending, timely, timeless (and tomorrow).

KEY TRENDS FOR 2026

ESCAPE VELOCITY

In a world of ever greater conflict and anxiety, consumers are seeking escape from adult responsibilities and modern realities in fantasies, fandoms and fluffy toys. Within this theme we explore the rise of adult collectibles, charmification, romantasy, and the all-conquering power of cute across a host of categories.

ELECTRIC DREAMS

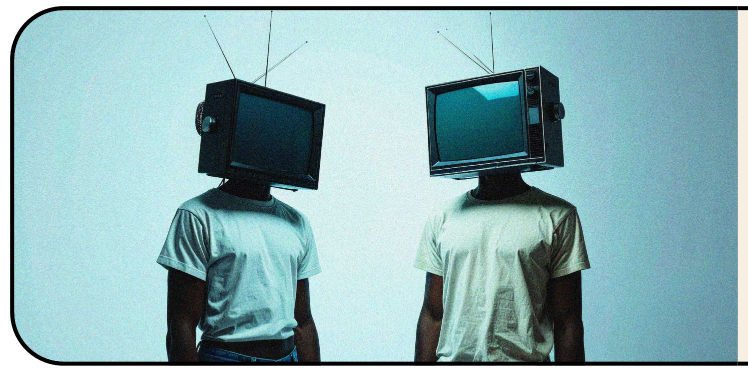
As AI accelerates at exponential speed, our emotional relationship with technology is struggling to keep pace. In this space we explore the disturbing rise of intense AI-enabled relationships, the changing face of AI influencers and an anti-slop resistance powered by slow content and healthy friction.

TRAD LIVES

We see a widespread desire to reconnect with nature, finding solace in the soil and community in traditional rituals. Within this trend we explore the shift away from the city, the rise of hyperlocal and the resurgence of religion and spirituality, alongside our obsession with fungi, pickles and fermentation.

ALONE TOGETHER

As loneliness and social isolation grow, we see a desire for new forms of social connection and shared spaces. The hobbies and hangouts of older generations, from knitting to Mahjong, are making a comeback. Within this theme we explore new models of socializing, the rise of natural highs and the power of influencers to provide social and cultural glue.



ANALOG FUTURES

In response to a world governed by algorithms and infused with AI, we see some younger generations embrace a more analog existence; or at least an analog aesthetic. Exploring this space we see an openness to simpler, more tactile devices, a growing resistance to algorithmic sameness and a nostalgia for simpler, more hedonistic times.

IMAGE CREATED WITH ADOBE FIREFLY

ESCAPE VELOCITY

1. ESCAPE VELOCITY

IN A WORLD OF EVER GREATER CONFLICT AND ANXIETY, CONSUMERS ARE SEEKING ESCAPE FROM ADULT RESPONSIBILITIES AND MODERN REALITIES IN FANTASIES, FANDOMS AND FLUFFY TOYS.

Cuteification has taken hold in multiple categories, alongside new collecting rituals and mythologies. But this is comfort with an edge of hysteria; "blind box" toys embrace cuteness with an edge of menace, while luxury brands awkwardly sit alongside toybox favorites. Whether it's a loss of trust in institutions, geo-political instability, cultural infighting, or the ever-rising cost of living, consumers today have a lot to worry about and adulting is hard.

Our Escape Velocity theme builds on trends we've been tracking for some time, from the "soft life" to embracing joy as an act of defiance and resistance, to adult milestones shifting further out of reach. But this year's expression comes with additional fin de siècle energy; if the future is so deeply uncertain, why not spend on a comforting perpetual adolescence?

OUR SUBTRENDS

I. ADVENTURES IN TOYLAND

THE RISE OF ADULT COLLECTIBLES

↓

II. FANTASTICAL FANDOMS

THE POWER OF IMMERSIVE FICTIONAL UNIVERSES

↓

III. THE CULT OF CUTE

THE UNSTOPPABLE CUTEIFICATION OF CULTURE

SUBTRENDS

I. ADVENTURES IN TOYLAND

Adults are turning to toys for comfort in record numbers, embracing a kind of dystopian cuteness that is part escape, part response to the unpredictability of modern living. Consumers are embracing soft toys, charms, and collectibles, often brought to them through luxury collaborations at considerable expense.

The Labubu has been the topic of much analysis grappling with the psychosocial semiotics of the deranged-cute toy. Earlier this year, the Pop Mart licensed character rocketed in popularity as a collectible (people were paying thousands for a single doll or insuring their collection).[1]

While the Labubu itself may have peaked, the memeification of fashion and beauty continues at pace, with high-end brands from Carolina Herrara to Marc Jacobs, Celine and Fenty developing beauty bag charms and luxury beauty chain Space NK developing its own Jellycat plush toy.

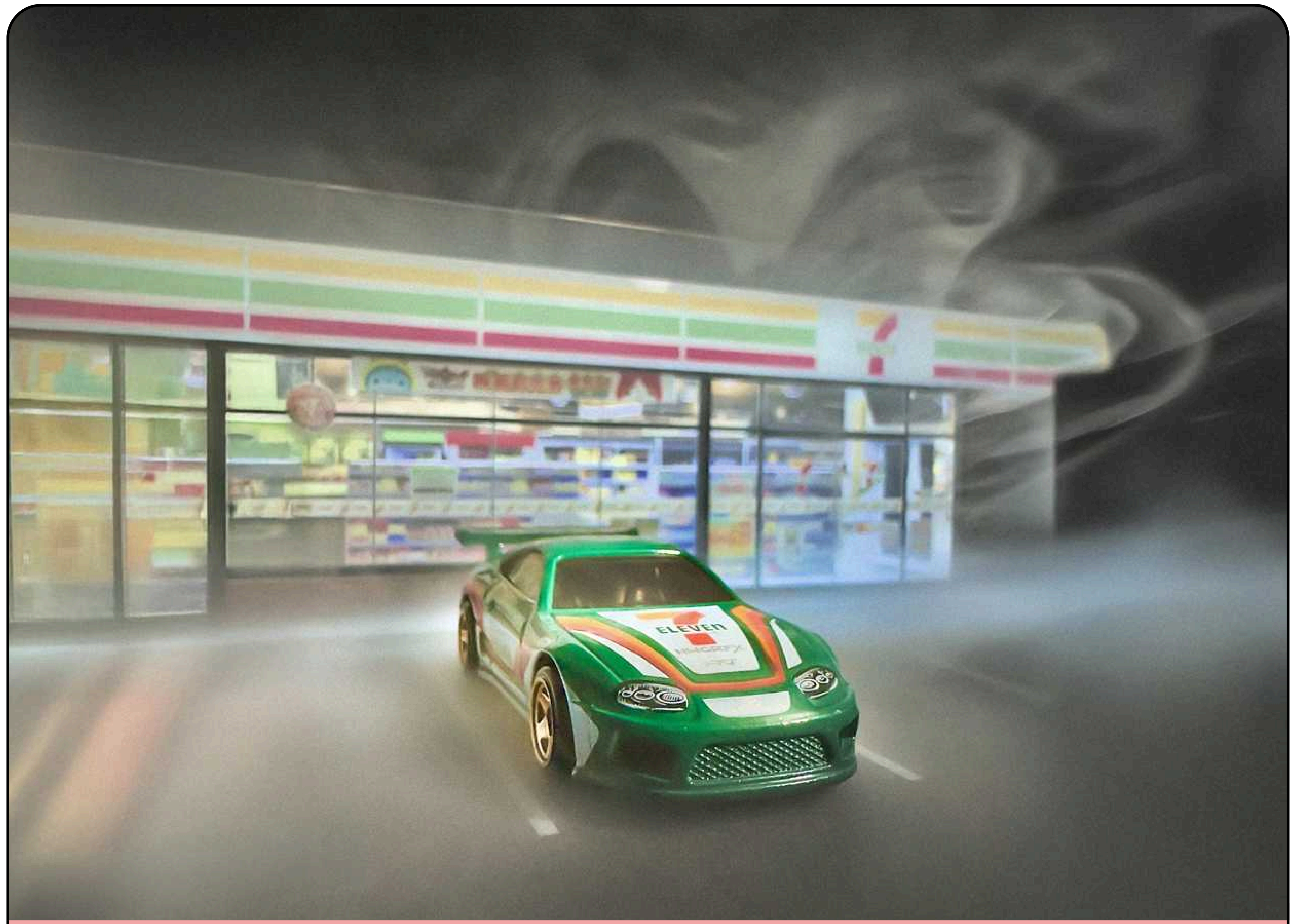
Meanwhile Crocs have partnered with fashion brands from Barbour to Simone Rocha (and Animal Crossing) to create "shoe charms". The soft toy aesthetic is also influencing product design with brands from Hugo Boss to Prada to Gucci embracing the trend, Hugo Boss in partnership with Steiff Teddy Bears.

Adult collectibles have emerged as modern day talismans, bringers of order and symbols of identity in a chaotic world.

Sales of toys to adults in the US alone have increased 18% YOY (Circana Research)[2] while Jellycat has reported a 66% increase in revenue to £333mn for the year to December 31 (Financial Times, October 2025)[3], as well as a high end partnership with Harrods to create the Jellycat Airlines pop-up, and a stuffed mantou toy with KFC Malaysia. American chocolatier Godiva's Limited Edition collection of ice creams and milkshakes managed to pile on two hype trends - Labubu packaging and Dubai chocolate flavor.

For some, collecting and collectibles acts as emotional self-soothing, creating a sense of order and connection with a community of fellow collectors, but collecting mania can create further anxiety. Kid-popular "blind boxes" (where you purchase a neutral box unaware of what you're getting) are booming in popularity amongst adults. However, unlike kids, where getting a dud and swapping is part of the fun, disappointed adults are bordering on addiction, spending up to $270 a week on finding the version they want.[4] In Japan the government put a stop to McDonald's collaboration with Pokémon as consumers were excessively purchasing meals that would go to waste.[5]

Meanwhile Google are encouraging us to make toys of ourselves, accelerating AI adoption through the medium of cute and collectible.



OUR WORK: 7-ELEVEN | HOT WHEELS

Marking 7-Eleven's first-ever partnership with Hot Wheels, we launched a nostalgic and immersive campaign designed to celebrate car culture. A unique blend of collectible merchandise and experiential marketing, the campaign featured exclusive products, from limited-edition Hot Wheels Silver Series Toyota Supra die-cast car, to a four-car Pop Culture set and branded fingerboards, along with a retro-inspired capsule clothing collection sold via the 7Collection website. Activations spanned social media, digital platforms, and in-store experiences, including a transformed 7-Eleven car meet with a life-sized Toyota Supra, a giant Hot Wheels blister pack, and a live DJ, as well as a 100-foot Hot Wheels track built inside a store and limited edition diorama sets offered online.

II. FANTASTICAL FANDOMS

Fandoms are louder, prouder and more impassioned than ever before, as we seek new ways to connect and define ourselves. The iconic Comic Con festival has expanded its reach beyond San Diego for the first time, making its European debut in Málaga, Spain.

At the intersection of Booktok and female-centered fantasy lives Romantasy, a publishing phenomenon that merges romance, "spice", and fantastical settings, often born of fanfiction sites and nurtured by Booktok communities with a more inclusive, feminist take on the romance novel. Tags like #steamybooktok are garnering over 4.7 billion views on TikTok[6], while writer Georgia Summers describes "The rise of cozy fantasy and romantasy and fairytale fantasy – books that have a bit more of an uplifting feel to them."[7]

American skincare brand Neutrogena partnered with content creator Serena Kerrigan on two short stories designed to make the reader "glow" like the serum. Meanwhile, audio book service Audible leant hard into "Romantasy" with a spot featuring dashing knights on horseback and suggestive copywriting.

Narratives from Japan, China and South Korea continue to feed Gen Z's desire to escape through entertainment: data released by Netflix in July 2025 reveals that over 50% of its global subscribers are viewing anime.[8] KPOP Demon Hunters has become an entertainment universe all of its own, with three different tracks in the Billboard Top 100[9], 300m+ streams on Netflix, as well as licensing-led collaborations with for example[10], Korean bakery Paris Baguette.

In the brand space we see Western brands join the club with Fenty Beauty partnering with Anime smash Arcane on a line of character inspired products and US based Atlanta Distillery partnering with Dragon Con on a limited edition vodka. Meanwhile London's Natural History Museum is due to open an already sold-out Pokémon pop-up in Spring 2026. Combining brand mascots, fan fiction and cuteification, Chinese Milk Tea brand Mixue has garnered a cult following for their serialized fan fiction published directly onto their retail receipts.

FANDOMS ARE LOUDER, PROUDER AND MORE IMPASSIONED THAN EVER BEFORE, AS WE SEEK NEW WAYS TO CONNECT AND DEFINE OURSELVES.

OUR WORK: FANTOUCHIE | GENERATIVE HAPTIC AI

Fantouchie by Dentsu Lab Tokyo pushes fandom-driven immersion to a new sensory frontier by transforming language into touch, allowing fans to physically experience textures inspired by their favorite world - real or imagined. Using a generative haptic AI system that converts words like "unicorn horn" into tactile sensations via vibration feedback, Fantouchie bridges digital and physical realms, creating deeper emotional engagement for communities obsessed with fantasy, gaming, and anime, providing multi-sensory ways to connect with stories and characters, while offering brands and creators a tool to amplify fan experiences through touch-based storytelling and immersive activations.

WHAT THE NUMBERS SAY

70% of respondents globally agree "Modern life is so stressful that sometimes I need to escape", rising to 80% among Gen Z. Consumers in Brazil (76%), the US (74%) and India (81%) are in particular need of escape.

63% of respondents agree "Cute products and packaging bring me much-needed joy," rising to 77% among Gen Z and 76% among Millennials. The Cute phenomenon skews somewhat female, with 71% of women agreeing with this statement, but 55% of men are also on board with the cuteification of everything.

36% agree "I define myself by the fandoms I'm part of," rising to almost 50% among Millennials and Gen Z. Indian consumers are particularly likely to identify themselves through fandom, with 65% agreement, while Japanese consumers are least likely to agree.

59% agree "I like the fact that not everyone "gets" the things I love - if you know, you know," rising to 69% of Gen Z. Brazil (68%), the US (65%) and India (78%) are particularly inclined to keep their fandoms for those in the know.

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

70%

AGREE "SOMETIMES I NEED TO ESCAPE FROM THE STRESS OF MODERN LIFE"

63%

AGREE "CUTE PRODUCTS/PACKAGING BRING ME MUCH-NEEDED JOY"

36%

AGREE "I DEFINE MYSELF BY THE FANDOMS I'M PART OF"

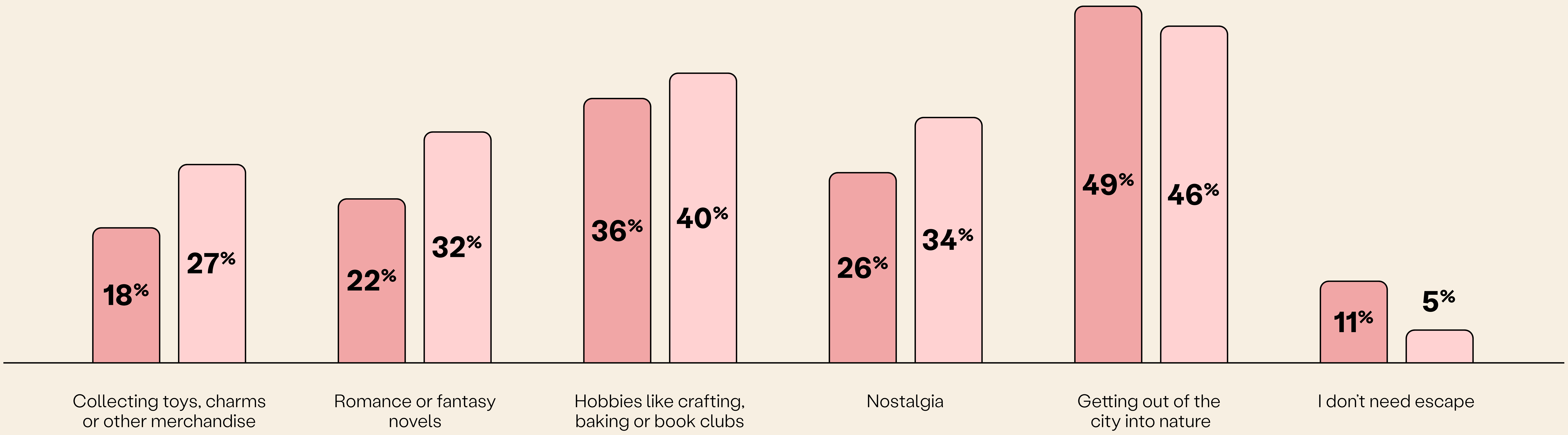
WHAT THE NUMBERS SAY

Unsurprisingly, Gen Z overindex on using collectibles and toys as a means of escape, at 27% globally, and on romance or fantasy novels, used by 32%.

Glimpsing ahead to trends we explore later, analog hobbies, nostalgia and escapes to the countryside are also important escape valves across generations. The Boomer generation are most likely to feel they don't need an escape, and interestingly, the least invested in nostalgia.

WHICH OF THE FOLLOWING DO YOU TURN TO AS AN ESCAPE WHEN YOU FEEL MODERN LIFE IS OVERWHELMING?

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025
STRONGLY/SOMEWHAT AGREE



III. THE CULT OF CUTE

Cute has long been the currency of the internet - as Günseli Yalcinkaya at Dazed Digital puts it: "Scroll down your feed and it'll become increasingly apparent that the Cute Industrial Complex pervades almost every aspect of online experience with a googly-eyed contagion".[11] In recent years, however, cuteification has taken over product, packaging and retail design at scale.

Cute has always been best served with a side of edge and perhaps that's why it meets this current moment so well. We're seeing cute-as-strategy influence little treats culture across product, packaging and retail design.

In the food space, coffee has become a daily shot of joy with pastel-hued beverages (blueberry matcha latte anyone?), and Starbucks are driving hype with their own blind-box retail tactics. The brand's "Bearista" cups, shaped, of course, like teddy bears sold out in no time and are already re-selling on eBay for hundreds of dollars.

We also see the emergence of literal cutie pies with the popularity of Luk Chup, teeny Thai desserts that are dominating the restaurants of New York and beyond.

Pepsi unashamedly embraced cute to market the taste of its cream soda and strawberry and cream flavors, described as "1% sweeter than a Pomeranian puppy", while Kikkoman soy sauce has introduced limited edition winter bottles with cozy scarves, crocheted bag charms and lucky cat merchandise.

Elaborate nails have become this generation's "lipstick effect" recession indicator and press-on nails are becoming micro-canvases for imaginary worlds in the hands of creators like A Manicured Queen. Elsewhere, premium skincare brands like Byoma, Glowery and I Dew Care are adopting candy shop-inspired branding. In a completely different space, Annie Joy Williams, writing in The Atlantic, coined the term "Cute debt" to describe buy now, pay later platforms.

In the tech space, photography brand Kodak leaned into charmification with their Kodak Charmera, a micro-photography device the size of a keyring. Meanwhile at the super premium end of the charmification trend, Johnnie Walker Vault have partnered with Harrods and Olivier Rousteing to introduce the wearable "Couture Flask", while Victoria Beckham's fragrance collection includes wearable perfume bottle necklaces.

IN RECENT YEARS, CUTEIFICATION HAS TAKEN OVER PRODUCT, PACKAGING AND RETAIL DESIGN.

TREND TRAJECTORIES

TRENDING

New offerings from Pop Mart are springing up such as the Hirono Living Wild Doll popularized by a member of KPop sensation BTS.

TIMELY

A desire for all things cute and fantastical, albeit with a slightly unhinged edge that speaks to a generation uncertain of when real-world goals will be within their reach again - if ever.

TIMELESS

The desire to escape our adult responsibilities and lose ourselves in the comfort of play.

TOMORROW

Expect to see cuteification extend across more unlikely categories as traditionally-adult purchases shift further and further out of reach. We anticipate the return of transmedia and immersive storytelling as fans crave deeper, richer engagement. The line between toys, collectibles and adult luxuries will continue to blur as luxury lipsticks reach new heights of design (and price).

WHAT IT MEANS FOR BRANDS AND BUSINESSES

CHARM OFFENSIVE

While cute may or may not be in your brand wheelhouse, the cuteification of everything has raised expectations of a level of craft, playfulness and attention to detail across every touchpoint. Seek out moments to raise a smile, even in small and subtle ways, from packaging to microcopy.

BUILD BRAND IP

Consumers are hungry for characters, collectibles and connections. Brands with historical mascots or merchandise could leverage rich opportunities to revive them, also successfully tapping into our nostalgia trend. Collaborations with entertainment properties, done correctly, can also be leveraged right the way through product innovation to the point of purchase.

FIND GOOD FRICTION

Conventional wisdom suggests diminishing attention spans and instant gratification. Yet Gen Z's determined quest to hunt down limited-edition merchandise, willingness to engage with complex, multi-faceted entertainment properties and openness to obscure points of "lore" shows a willingness to work with complexity when the reward is sufficient.

ELECTRIC DREAMS

2. ELECTRIC DREAMS

AS AI ACCELERATES, WE SEE NEW PATTERNS IN HOW CONSUMERS ARE ENGAGING WITH AI-GENERATED CONTENT, ADVICE AND INFLUENCERS. DEEP EMOTIONAL CONNECTIONS ARE BEING FORGED WITH AI CHATBOTS, DESPITE CONSUMERS' TRUST ISSUES WITH SOME AI-ENABLED CONTENT.

Children's toys are being upgraded with AI, with major implications both for privacy and young children's ability to understand real versus synthetic influences. AI actors and musicians are breaking new ground in hyper-realistic artificial influence, a world away from earlier incarnations which borrowed from the world of animation - disrupting the worlds of culture, entertainment, and media in the process.

Meanwhile the rise of "slop" - low-quality, mass-produced content - is accelerating so quickly that platforms from YouTube to Spotify have been forced to take action to protect the integrity of the user experience. In parallel, we see a growing appetite for slow, thoughtful, and curated content - less a sound bite, more something to chew over.

OUR SUBTRENDS

I. THE AI SITUATIONSHIP

INTENSE PSEUDO-RELATIONSHIPS FORMED WITH AI

↓

II. SLOWING THE SLOP

A BACKLASH AGAINST MASS-PRODUCED "SLOP"

↓

III. AI-INFLUENCERS ASSEMBLE

THE ETHICS OF HYPER-REALISTIC AI INFLUENCERS

I. THE AI SITUATIONSHIP

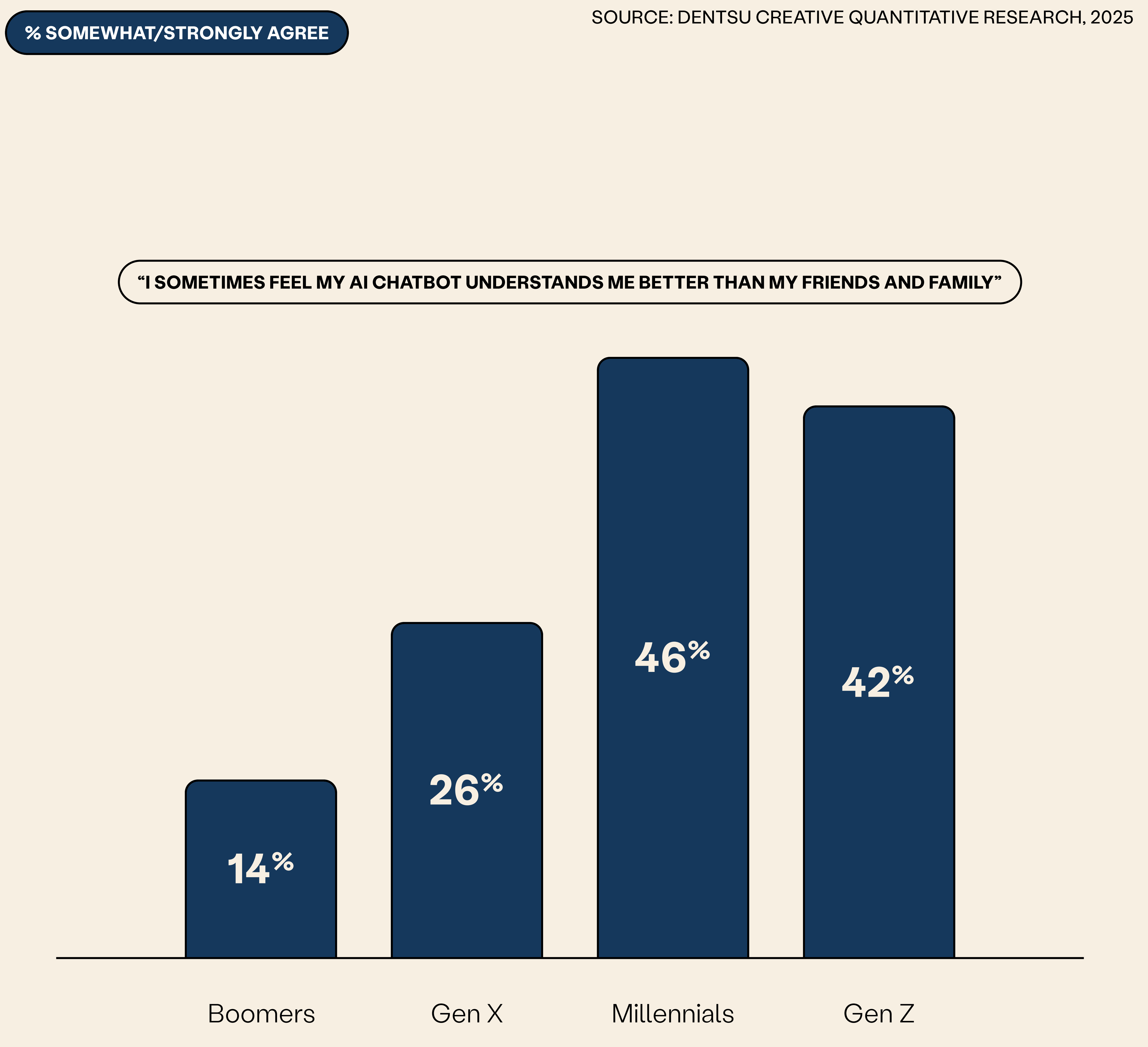
Research has shown that consumers are increasingly using AI for personal reasons as much, or more than, work-related fixes. Therapy is often cited as a key use case, with a Harvard Business Review study[12] identifying "therapy and companionship", "organizing my life" and "finding purpose" as the top three use cases for Generative AI. Open AI's own analysis however suggests that "relationships and personal reflection" accounts for just 1.9% of conversations, and "role play" for 0.4%.[13] Use cases by platform will of course vary; nevertheless, some respondents report real grief and loss when a particular model that "knows" them intimately is upgraded.

Significant safeguarding concerns arise over the intensity of relationships formed by vulnerable individuals and the displacement of human relationships. Friend.ai, the AI-enabled wearable we highlighted in our 2025 predictions, saw a wave of protest graffiti in response to a recent advertising campaign in New York City.

Elsewhere we see brands avoid the uncanny valley trap through devices that are explicitly non-human and character led. The cute (of course!) Poketomo device is a desktop-sized AI toy to help with tasks whilst China's TCL AiMe is designed explicitly as a playful design "created to bring warmth, wonder, and human connection to technology". Stuffed animals powered by AI, such as Chattybear, Grem (or Grok) have however sparked some parental anxieties.

AI is also intruding on human-to-human relationships, with some users outsourcing their online dating conversations to AI, with the result that in-person encounters feel like dating a different person, leading The Guardian to coin the term "Chatfishing".[14]

RESEARCH HAS SHOWN THAT CONSUMERS ARE INCREASINGLY USING AI FOR PERSONAL REASONS AS MUCH, OR MORE THAN, WORK-RELATED FIXES.



II. SLOWING THE SLOP

The rise of AI-generated content has led to a dramatic increase in problematic, low quality "slop" alongside higher quality use cases. Analysis shows that almost 1 in 10 of the fastest growing YouTube channels are powered by entirely AI-generated content.[15] So much of this content is now generated that YouTube and Spotify alike have taken steps to prevent the monetization of "mass produced" content. Analysis from Raptive suggests that trust in articles drops when the copy "feels" AI generated.[16] Even Sam Altman, one of the godfathers of AI, has speculated on the possibility that the "Dead Internet Theory" may become a reality, as more than 50% of internet traffic is already generated by bots.[17] Recent analysis from SEO firm Graphite shows that the quantity of AI generated content being published surpassed human content, despite the fact that AI generated articles seem today to perform less well in SEO. Meanwhile, researchers at BetterUp Labs and the Stanford Social Media Lab coined the term "workslop" to define lazy, ill-considered outputs in the workplace which actually increase inefficiency.

The counter trend is the desire for substance, slow journalism and slow content. Nike have joined the Substack community with their newsletter, In the Margins, to reach a community of users interested in deep, rather than dopamine-fueled engagement.

Under Armour recently announced the launch of Lab 96, "A new era of Athlete Storytelling" designed to build entertainment worlds around athletes and fandoms. Luxury hospitality brand Belmond, owners of the Orient Express, launched a slow media offering of "Long Shot" videos transporting viewers to diverse destinations through ambient video content of destinations from the highlands of Scotland to the waterfalls of Brazil. Vogue will shift from a monthly magazine to quarterly "feature" issues based on themes or cultural moments under the new editorial stewardship of Chloe Malle (Conde Nast, Oct 2025) whilst former Vogue editor Edward Enninful is launching his own title 72 Magazine which will focus on deep dives into fashion culture.

Taking slow engagement out into the wild, Swedish perfume brand Koyia's forest-based perfumery invites customers to purchase fragrances using time instead of money - 599 seconds of stillness in nature rather than 599 Swedish kronor. This equates to ten minutes of time, roughly the amount of time required for the benefits of being in nature to take hold. Feeding the deserve for slower, more intellectually rewarding pursuits, chess clubs such as Knight Club have reimagined the game with cocktails, DJs and a younger audience.

OUR WORK: CANON | NO CLICK NO PROMPT

Dentsu Creative Brazil's campaign for "Canon do Brasil", "No Click, No Prompt", highlights the power of human creativity in an era dominated by automation. While generative AI can produce images from text prompts, the campaign asserts that the photographer's "click", rooted in perspective, intuition, and lived experience, is irreplaceable. By showcasing iconic photographers and their unique gaze, "Canon do Brasil" reframes photography as an art form championing the authenticity of human vision. This stance resonates with audiences seeking meaningful, crafted content, reinforcing Canon's role as a champion of creative integrity.

WHAT THE NUMBERS SAY

53% of respondents in our study say they are using AI-enabled chat platforms in their personal lives, rising to 70% among Gen Z worldwide, 64% in Brazil, 71% in China and dropping to 37% in Japan and 45% in Spain. 51% agree (22% strongly agree) that they ask these platforms for help with questions they would previously have asked a human - a parent, teacher or friend, rising to 63% among Millennials and 65% among Gen Z, a finding with interesting implications for social cohesion and intergenerational connections. Significantly, **32%** of respondents agree "I sometimes feel my AI chatbot understands me better than my friends and family", rising to 46% among Millennials and 42% among Gen Z, (20% of whom "strongly" agree), again with major implications for emotionally healthy relationships.

Just **46%** of respondents are confident that they can spot AI generated content, with a significant generational gap - 64% of Gen Z versus 24% of Boomers. Gen Z are also the most likely to agree that "I'm turning to slower, more rewarding content in response to a newsfeed full of disposable content", at 54% vs 48% for the total sample.

Globally, we see some resistance to AI-generated influencers: **43%** of consumers agree "I don't follow any now and I am not interested in following an AI-generated influencer". Respondents in India and China are most likely to be following AI-generated influencers already, while those in the UK, Spain and Japan are most resistant.

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

53%

AGREE "I'M USING AI-ENABLED CHAT IN MY PERSONAL LIFE"

46%

AGREE "I'M CONFIDENT I CAN SPOT AI-GENERATED CONTENT"

43%

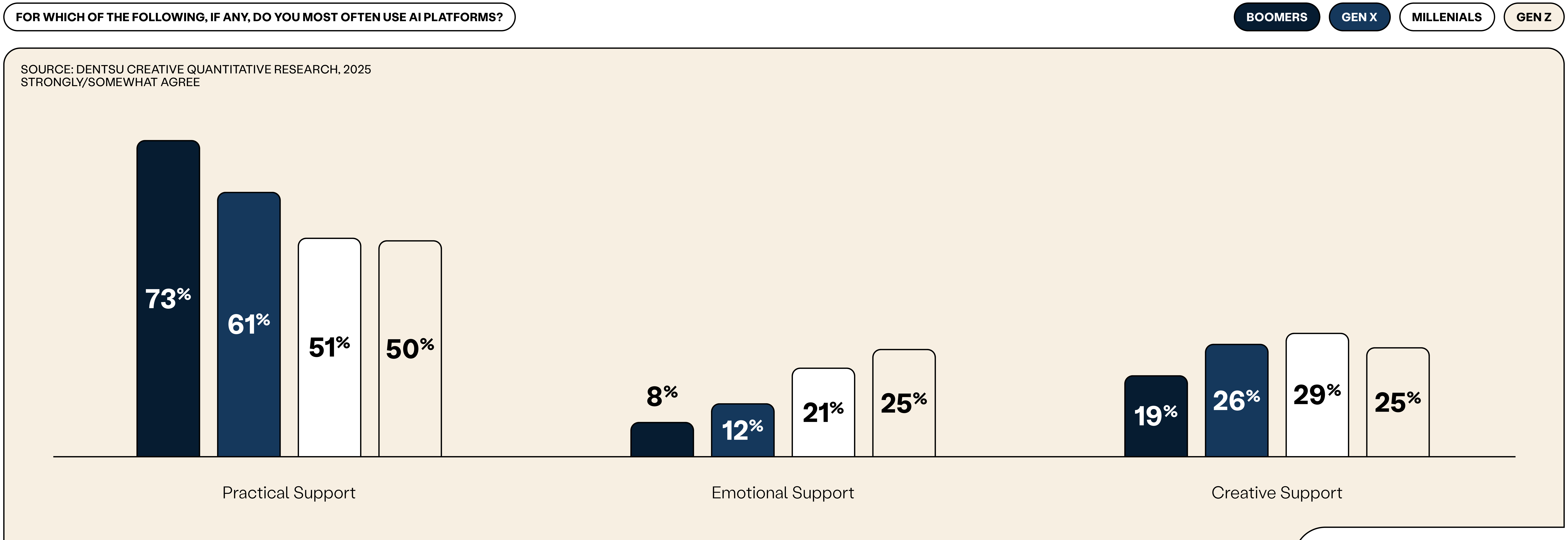
AGREE "I'M NOT INTERESTED IN FOLLOWING AI INFLUENCERS"

WHAT THE NUMBERS SAY

The most common use of AI platforms today noted in our survey is for practical support and advice - **40%** of global respondents who use AI in their personal lives use it "To learn about a specific topic." However, significant generational differences emerge. Gen Z respondents using AI in their personal lives are significantly more likely to use AI for emotional support than older generations, with almost 11% using AI "To listen to me."

Overall, we see 25% of Gen Z using AI for emotional support in some shape or form (to listen, for guidance, to feel less lonely), versus 8% of Boomers. Conversely, 73% of Boomers use AI for practical support, vs 50% of Gen Z. Millennials are most likely to use AI as a creative partner, and "To feel less lonely" (5%).

FOR WHICH OF THE FOLLOWING, IF ANY, DO YOU MOST OFTEN USE AI PLATFORMS?



III. AI-INFLUENCERS ASSEMBLE

Virtual influencers have been with us for some time. Dentsu pioneered early ventures in this space with our dentsu VI platform - but a significant shift in 2025 saw the boundary between real and AI-generated influencers blur as never before.

While previous generations of virtual influencers have been very obviously computer-generated, borrowing cues from Manga and Animé, more recent cases have been almost impossible to distinguish from the real thing. AI generated singer Xania Monet, created using the Suno app, has signed a $3M record deal,[18] while The Velvet Sundown racked up over 1M Spotify streams before admitting that the band, the backstory and their music were AI generated.[19] Hip Hop megaproducer Timbaland has debuted TaTa, an AI-generated "artist" whilst Claude AI 3.5 is the first neural network-based act to top the charts.[20]

Most recently, AI 'actor' Tilly Norwood, created by studio Xicoia, caused a storm of controversy at the Zurich film festival, while the UK's Channel 4 introduced the first AI generated newsreader.

Beyond pop culture, a British MP has been the first member of government to turn themselves into an avatar as a way of reaching voters. This reflects recent insights from We Are Pion, showing that 55% of US and UK based Gen Z/ Alphas, believe their online avatars represent their true self better than their real-life appearance.[21] The quiet launch of Justin Bieber's new fashion label Skylrk, has been lauded as a well-crafted example of avatar-based marketing. The campaign short, animated by digital artist Gal Yosef sees the pop star and his wife rendered in a real-or-rendered aesthetic.

With ultra-realistic AI influencers and creators on the increase, fascinating ethical dilemmas around copyright, ownership and disclosure emerge. In an intriguing move, Denmark became the first country to grant its citizens copyright to their own body, face and voice. Meanwhile fashion brand Aerie have committed to use "No AI generated people or bodies," pledging to stay "100% Aerie Real". Kombucha brand Counter Culture emphasize being "made by actual humans", with playful flavors such as "AI of the Storm".

WITH ULTRA-REALISTIC AI INFLUENCERS AND CREATORS ON THE INCREASE, FASCINATING ETHICAL DILEMMAS AROUND COPYRIGHT, OWNERSHIP AND DISCLOSURE EMERGE.

TREND TRAJECTORIES

TRENDING

"Chatfishing", chat therapy and surprisingly intense parasocial relationships with AI-enabled chatbots.

TIMELY

Managing ever-increasing content demands through AI-enabled content, striving to balance craft, distinctiveness and innovation.

TIMELESS

The desire to feel connected, even if through artificial means.

TOMORROW

Multi-modal Agents incorporated in AI-enabled browsers will enable new levels of personalization and responsiveness, incorporating image and voice recognition to deliver increasingly human-feeling interactions. New guidance on transparency and safety will be developed to create guardrails as AI accelerates. Made by and for humans will become a new frontier in luxury.

WHAT IT MEANS FOR BRANDS AND BUSINESSES

DESIGN FOR DIFFERENCE

AI-enabled content is essential to keeping up with the algorithms' hunger for fresh and diverse content. Yet without human craft, we risk simply scaling for sameness. As marketers embrace modern, AI-enabled content supply chains, it is essential that we use craft, data and context to deliver difference, not sameness, at scale.

ALL THE FEELS

Increasingly sophisticated agents will make it tempting to outsource more and more customer service or HR interactions, yet we must remember that how something works is often less important than how it feels. This can work both ways; AI chat can feel highly personal (sometimes to an unhealthy degree) yet some AI-enabled interactions can fall emotionally flat.

AVOIDING "WORKSLOP"

"Workslop" has become the latest symptom of excess AI usage in the workplace, where low quality, AI-generated content makes work rather than saving time. One solution is a clear vision and hypothesis for how AI can most productively be applied to workflows: where can it enhance efficiency, where does it augment effectiveness and where does it unlock exponential advantage? (Equally important, where should it never be used?)


TRAD LIVES

3. TRAD LIVES

IN YET ANOTHER RESPONSE TO FAST-PACED CONTEMPORARY LIVING, WE SEE CONSUMERS FINDING SOLACE IN THE SOIL AND LIVELIHOODS IN THE LOCAL.

We see a widespread desire to reconnect with nature, a newfound interest in farming and a shift towards second cities. The countryside is displacing the city as the locus of aspirational lifestyles and becoming a place where community-up innovation can scale. Similarly, the desire to "ground" manifests in the rediscovery of spirituality and the embrace of traditional values. Younger generations are returning to religion and spirituality at unprecedented levels around the world, particularly young men.

Major museums and cultural centers are focused on earthy themes, from "Soil" at Somerset House to "Dirty Looks" at the Barbican. Fungi and fermentation are a source of fascination, with pickle flavors and recipes dominating the grocery aisle, and even Pamela Anderson entering the market.

SUBTRENDS

OUR SUBTRENDS

I. THE LAND GRAB

A POWERFUL DESIRE TO CONNECT WITH THE EARTH

↓

II. NO PLACE LIKE HOME

THE RISE OF HYPERLOCAL

↓

III. SPIRITUAL QUESTS

A NEWFOUND INTEREST IN RELIGION AND SPIRITUALITY

I. THE LAND GRAB

Consumers the world over exhibit a yearning to touch grass and root their hands in the soil. People are reconnecting with the land through farmstays, hiking, camping, foraging, gardening, and growing.

"Ferment: The Life Changing Power of Microbes" by Tim Spector became an instant bestseller, while "Wicked" costume designer Paul Tazewell used fungi as inspiration for Cynthia Erivo's Elphaba costumes.

Amongst younger audiences in China there is a surge in foraging and outdoor connection as people opt out of a demanding work culture and escape the intensity of the city. Meanwhile, young Indian entrepreneurs are returning to farming at unprecedented rates, bringing with them technological innovation and AI-enabled agriculture, explains Dr. G. Bhargavi.

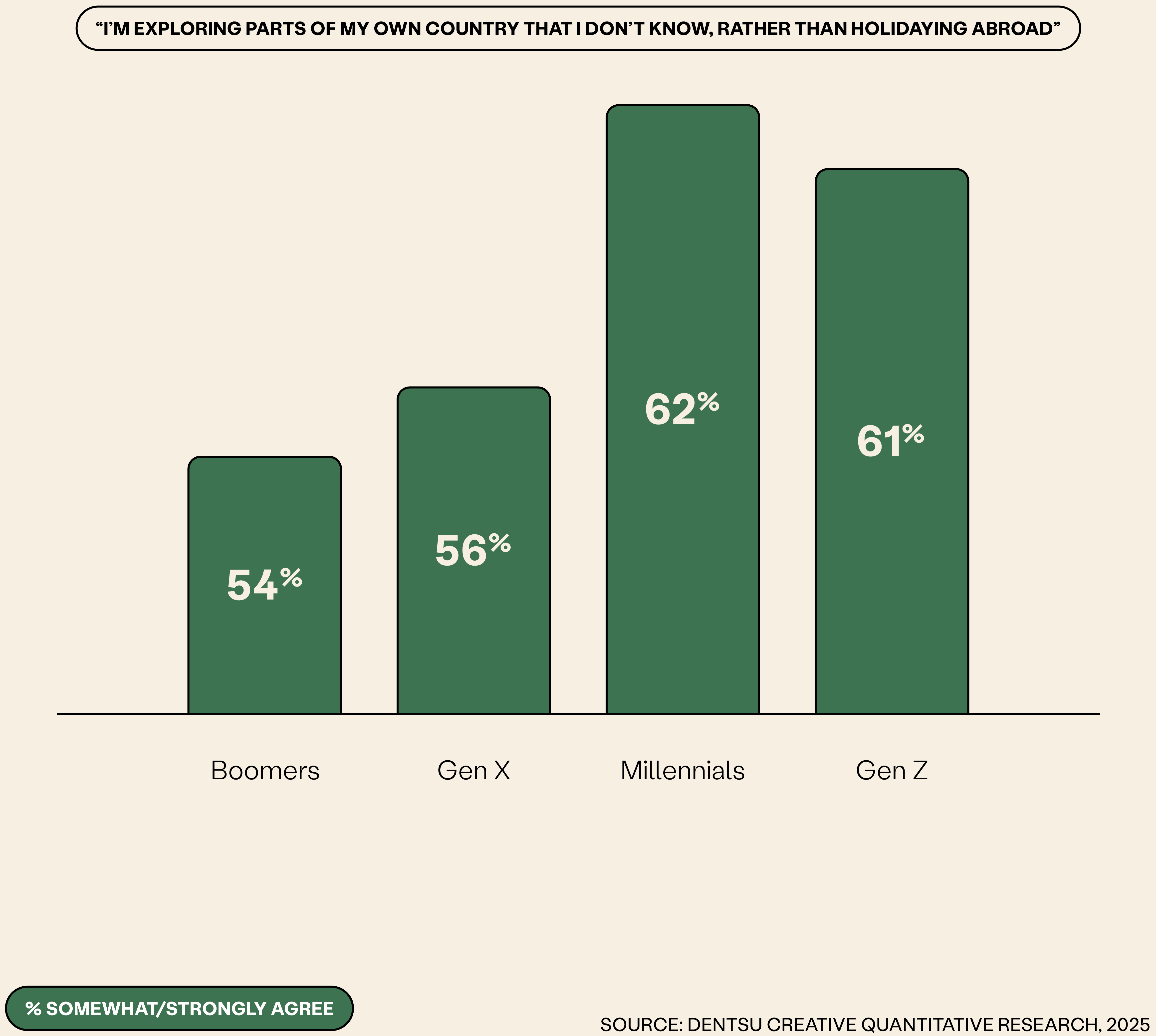
In the UK, the National Trust, which manages many of the nation's woodlands and country parks, has reported a 39% rise in 18-to-25-year-old members last year, reflecting the appeal of instant, wholesome nature-based therapy at no or low cost.[22] In Malaysia, "Healing Chairs" have gained popularity; simple camping chairs enabling people to take a moment to simply rest, and be, in nature.

Reflecting country style, in the brand space iconic salad brand Sweetgreen have released a series of merch benefiting the Young Farmers Coalition whilst rural lifestyle retailer, Tractor Supply Company are collaborating with influencers on high fashion farmwear. The "Rich Autumn Dad" look inspired by none other than David Beckham embraces functional countryside chic. Elsewhere consumers are bringing the outside inside: mass supermarket Target launched their Good Little Garden fresh floral brand earlier this year whilst DIY floral arranging is taking off through companies like Bouquet Box Flower Bar.

Farmsteads and forests are becoming home to the gallery and cafe culture usually associated with the big city. Concept cafes are cropping up in the unlikeliest of places like the archaeology-themed T7A2 cafe in Chongqing, rural China, where people can sip coffee, browse artefacts and take part in hands-on workshops. Upstate New York now hosts the vibrant Upstate Art Weekend whilst the Thorns gallery in England is dedicated to countryside art and artistry.

OUR WORK: SPOTIFY | BLOOMBEATS

BloomBeats, the visual identity campaign created by Dentsu Creative Italy for Spotify's Sanremo Festival playlist, fused music and organic aesthetics into a dynamic, personalized experience. Celebrating Sanremo, the "City of Flowers", Spotify used a generative design system to transform each song's data, such as BPM and sound dynamics, into unique floral-inspired visuals. These blooming designs appeared across the app and promotional assets, allowing users to generate and share their own personalized flowers. By blending technology, music, and nature, BloomBeats taps into a progressive cultural shift toward natural motifs and sensory experiences, creating an interactive identity that feels both organic and deeply personal.



SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

II. NO PLACE LIKE HOME

At a time of geopolitical instability, national pride is in ascendance, alongside a desire to discover new aspects of your own country rather than travel too far afield. "Second cities" are rising in prominence and appeal across Asia Pacific, both as travel destinations and alternative homes. Countries like South Korea are incentivizing people to set up businesses in the countryside, particularly young people, to better distribute wealth, culture and talent across the country.

In Vietnam, Thailand and China we see a return to staycations driven by a sense of national pride and a desire to connect with local culture. As Ashley Dudarenok puts it, in Jing Daily, "The most potent symbol of "zìxìn" (self-confidence) is the shifting geography of aspiration. The once-coveted trip to Paris or New York is now rivaled, and often surpassed, by domestic journeys to China's own historical and cultural epicenters."

This trend has the added bonus of avoiding the problematic international tourist circuit, itself under considerable scrutiny as tracked in our 2025 report. The Visit Faroe Islands' tourism board for example initiated an Auto Odyssey: Self-Navigating Car Adventures project comprising 30 mystery self-drive road-trip itineraries to spread tourists away from the country's busiest attractions.

Uber recently launched a railway wine tour inviting people to travel and taste the regions of their own country.

Celebrating hyperlocal cultures is also on the increase: in the media space, in India BharatDiffusion.ai uses AI-powered visuals to adapt content to the culturally and linguistically diverse Indian audience whilst the BBC's "Made of Local" campaign celebrates the UK-wide locations where BBC content is produced. Independent beauty brand Dulcie has created a range of hyperlocal perfumes based around the scent of very precise locations around the South Coast of England. Leaning into both local and farming trends, earlier this year Walmart Canada trialed an initiative in Montreal with Lufa Farms, a hyperlocal hydroponic urban farm which offers produce freshly picked within one hour.

Staying closer to home is also an economic necessity for many as the cost of living spirals. Taking the "no place like home" trend literally, "trad sons" or "hub sons" are (apparently) the new trad wives; a generation of young men choosing to live at home in exchange for domestic chores.

WHAT THE NUMBERS SAY

75% of respondents globally agree that "I'm drawn to spending more time in nature", with Brazil (82%), China (87%), Spain (80%) and India (88%) in particularly strong agreement. Millennials are most likely to seek comfort in nature, with 80% agreement, followed by Gen Z at 78%. 64% agree that "technology can help us preserve and enhance the natural world," rising to 83% in China, 80% in India, and 77% in Brazil.

52% agree that they are "Exploring my spirituality more as life feels more uncertain", rising to 56% in the US, 68% in Brazil, 72% in China and 73% in India. Once again Millennials lead the charge, with 63% agreement, followed by the Gen Z cohort at 58%.

58% of global consumers agree "I'm exploring parts of my own country that I don't know, rather than holidaying abroad", although agreement is lower in the UK and US at just 54%. **64%** agree that they are "Drawn to traditional values and ways of living," with remarkable consistency across generations, rising to 75% in the US and 70% in the UK but significantly lower than average in China and Japan.

63% agree "I'm drawn to music and TV shows from earlier generations, because it feels like people had more in common and were less divided," although we see interesting differences around the world. The US (70%), Brazil (74%), UK (67%) and India (76%) are feeling particularly nostalgic, while China (51%) and Japan (43%) are facing forwards rather than looking to the past.

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

75%

AGREE "I'M DRAWN TO SPENDING MORE TIME IN NATURE"

64%

AGREE "I'M DRAWN TO TRADITIONAL VALUES AND WAYS OF LIVING"

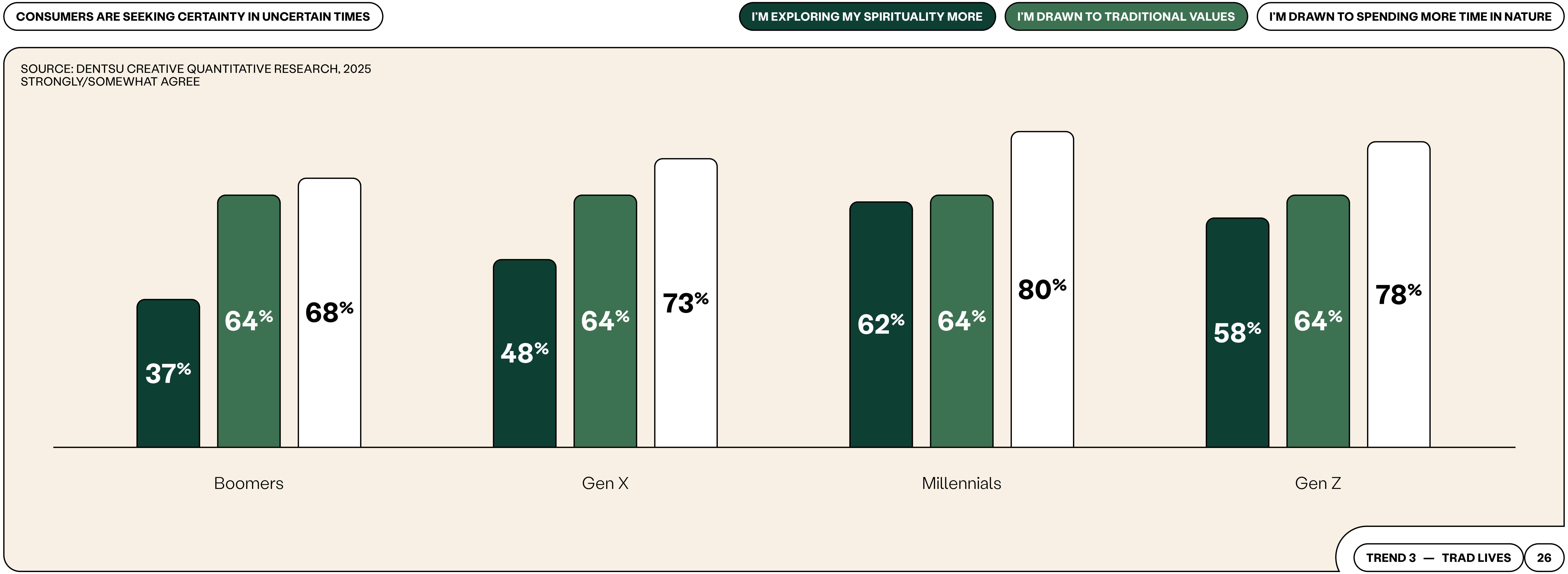
63%

AGREE "I'M DRAWN TO MUSIC AND TV FROM EARLIER GENERATIONS"

WHAT THE NUMBERS SAY

Consumers across generations are seeking comfort in nature, and certainty in traditional values and spirituality. Millennials in particular are drawn to seeking spiritual depth and solace in the outdoors. 32% of millennials and 29% of Gen Z also agree strongly that they are drawn to more traditional values and ways of living.

CONSUMERS ARE SEEKING CERTAINTY IN UNCERTAIN TIMES



III. SPIRITUAL QUESTS

A desire to reconnect with religion and spirituality is also on the rise as consumers seek guidance, certainty and healing in a time of turmoil. It's well documented that consumers the globe over are reconnecting with the dominant world religions where their role in society and how to navigate it is perhaps more clearly defined.

Church attendance in the UK has increased over the past 6 years, with 18–24-year-olds emerging as a key demographic.[23] "The Quiet Revival" report by The Bible Society shows that regular attendance among 16–24-year-olds has quadrupled in the six years from 2018-2024.[24] Similarly in the US, young men in particular are being drawn back to the church, comforted by certainty and tradition.

Churches and holy texts are being re-imagined in contemporary formats for new audiences like the Byble bible or Saint church in London. Shabbat clubs are appearing in New York for young Jewish people to find community.

For others, their spiritual journey, like so many other aspects of their lives, is now digitally enabled or inspired.

In China, Taoist fish talismans are reimagined as phone apps. For this year's Ramadan, Snapchat launched HazAR FazAR embedding Arabic folktales with AR gamification.

Elsewhere youth are taking inspiration from spiritual objects. Chinese youth are visiting temples in increased numbers, also embracing religious aesthetics such as temple fortune bags and prayer bracelets. Chinese temples are creating spiritual objects and tokens that reflect the aesthetic preferences and cultural tastes of younger audiences, for example good luck bracelets, character-led collectible ornaments, key chain charms and teacup sets.

At the super premium end of the market, the notion of the Talisman is gaining energy, with DeBeers celebrating the 20th anniversary of its iconic natural diamond Talisman collection. Pandora have also leaned into the idea of the protective talisman, with a collection "Inspired by ancient coins and inscribed with powerful Latin mantras."

TREND TRAJECTORIES

TRENDING

A preoccupation with fungi and fermentation to boost health and minimize waste.

TIMELY

A need for respite from modern urban living.

TIMELESS

A longing for certainty and a sense of belonging.

TOMORROW

Engagement with regional and neighborhood communities will surface hyperlocal influencers and niche aesthetics, enriching the cultural and brand landscape. The McDonald's "World Menu Heist" campaign is a light example of this, where international menus are popping up in different countries for a limited time. As the cost of living continues to climb, we expect to see more adult children returning to intergenerational homes.

WHAT IT MEANS FOR BRANDS AND BUSINESSES

HYPERLOCAL HYPE

Cultural curiosity meets national pride as consumers seek hyperlocal products and experiences. Ingredients with origin stories grounded in authentic spaces and places have huge appeal to a generation in search of meaning and belonging.

DECENTER THE CITY

The next generation of rural dwellers will be very different to older generations. As patterns of how and where we live are shifting, investing in smaller or "second tier" cities now may unlock new relationships with these emerging households.

THE POWER OF RITUALS

As consumers seek certainty and centeredness, the ability to create moments of calm and establish mini rituals and rhythms within their lives will be a powerful element of brand experiences.

IMAGE CREATED WITH ADOBE FIREFLY

ALONE TOGETHER

4. ALONE TOGETHER

BUILDING ON LAST YEAR'S TOGETHERNESS DEFICIT, WE CONTINUE TO SEE LONELINESS AND ISOLATION ON THE RISE, ALONGSIDE A DESIRE FOR NEW FORMS OF SOCIAL CONNECTION AND NEW SHARED SPACES.

56% of global consumers say that, as they spend more time online in social media and virtual worlds, they feel less secure in their interpersonal skills when meeting people in person. Many are seeking new "third spaces" and opportunities to connect as the "no/low alcohol" trend means pubs are no longer the default hangout. "Soft clubbing" has been embraced by Gen Z, with Eventbrite data showing a dramatic increase in "sober curious" formats and day time events.

The atomization of content continues, increasingly enabled and encouraged by entertainment IP owners. Within this fragmented ecosystem, powerful streamers and influencers provide vital connective tissue. Retailers and entertainment platforms alike are recognizing their role in connecting and mobilizing communities, and are therefore empowering them with shared rights and revenues.

OUR SUBTRENDS

I. VILLAGE PEOPLE

NEW FORMS OF SOCIALIZING HELP REBUILD THE 'VILLAGE'

↓

II. NATURAL HIGHS

NEW BEHAVIORS REQUIRE NEW POSSIBILITIES

↓

III. ISLANDS IN THE STREAM

CREATORS PROVIDE MUCH NEEDED CONNECTION

SUBTRENDS

I. VILLAGE PEOPLE

A recent study by MIT's Senseable City Lab reveals that pedestrians are walking 15 percent faster and stopping to linger 14 percent less than they used to. Whether through city planning or online filter bubbles, the environments we interact with are estranging us by design.[25]

Whilst we have strong "inner rings" of close friendships and friends, close "outer rings" of online communities, we lack the "middle ring" of neighborhood relationships or the "village", (as defined by Marc J. Dunkelman, of Brown University). The "village" allows us to meet people of different lifestyles, learn to live with difference and build tolerance and empathy: "Families teach us love, and tribes teach us loyalty. The village teaches us tolerance," explains Derek Thompson in The Atlantic.

The loss of third spaces is having a significant impact on our societal and cultural wellbeing. In response, we see the rise of unique social gatherings designed to provide strangers with moments of connection, alone-together formats emerging as a low-stakes opportunity to simply be in the company of others.

The Silent Bookclub creates places for people to bring their own book and read together in the absence of local libraries. In South Korea, the CGV cinema chain are hosting knit-whilst-you-watch screenings building on the grassroots "KnitFlix" trend, whilst luxury brand Valentino launched a prestige listening club in Madison Avenue. "Across the UK, Gen Z is embracing hobbies once associated with their grandparents: crochet and knitting circles, pottery cafes, Mahjong nights and supper clubs" according to The Guardian. Millennials, on the other hand, can't help turning casual activities into a "Hobby Energy" obsession.

Brands are leaning into community-gathering spaces authentically by supporting and amplifying existing initiatives. Building on its ongoing support of LGBTQ+ communities Skittles partnered with community-organizing platform Meet Up to create the Skittles LGBTQ+ Directory, helping consumers find groups and events. Similarly, British body care brand Lush partnered with The Logging Off Club, which specializes on IRL events.

BRANDS ARE LEANING INTO COMMUNITY-GATHERING SPACES AUTHENTICALLY BY SUPPORTING AND AMPLIFYING EXISTING INITIATIVES.

TREND TRAJECTORIES

TRENDING

Grandmillennial energy infects Gen Z as they embrace Mahjong, knitting and supper clubs.

TIMELY

New ways to socialize for a generation for whom pubs and clubs are no longer the default.

TIMELESS

The desire for human connection and belonging.

TOMORROW

New occasions - morning raves, sleepover clubs, at-home entertaining - all become new spaces for brands to nurture and be a part of. A yearning for connection and to step offline will continue to power unconventional gatherings from sauna raves to chess clubs and beyond. We anticipate that adaptogens will extend from the NoLo alcohol category across new food and supplement categories.

II. NATURAL HIGHS

New models of socializing meet ambivalent attitudes to alcohol in experiences, brands and products aimed at those who want to find alternative highs and connections. According to Gallup's latest data, just 54% of US adults now identify as drinkers — the lowest percentage since Gallup began tracking the stat over eight decades ago.[26] The low/no alcohol spirits category is booming, with the "alternative highs" subcategory one of the newest and fastest growing; these are brands such as De Soi and Kin Euphorics, infused with ingredients offering "alcohol adjacent" benefits such as CBD, mushrooms and adaptogens. These "NoLo" alternatives also play on the language of rituals and elixirs, playing into our Spiritual Quests trend. Meanwhile, our fascination with fungi also surfaces in the world of sweet treats: luxury hot chocolate brand Knoops hosted a daytime mushroom chocolate rave to celebrate their new hot chocolate infused with lion's mane mushrooms, in partnership with Dirtea.

Coffee raves are also popping up in Taiwan and South Korea. Even Seoul, a city renowned for its late-night drinking culture, is putting on daytime club nights fueled with specialty coffees. Park Jae-hyun, founder of Seoul Morning Coffee Club, explains in the Korea Herald, "it's about rewriting social habits in a city built around late nights. Alcohol-free gatherings create a different social energy, one that fosters trust and ease across generations."[27] In Malaysia we see a return of the house party or supper club with people choosing to sidestep noisy and overpriced bars in favor of at-home entertaining.

FANDOMS ARE LOUDER, PROUDER AND MORE IMPASSIONED THAN EVER BEFORE, AS WE SEEK NEW WAYS TO CONNECT AND DEFINE OURSELVES.

OUR WORK: ASAHI | SUMADORI

With Japan's alcohol-consuming population declining, particularly among Gen Z and Millennials, there is a growing psychological and social divide between drinkers and non-drinkers. In response to this shift, Asahi Brewery and Dentsu Digital established SUMADORI Inc. to promote a new drinking culture, Smart Drinking®, with the aim of fostering an environment where both drinkers and non-drinkers can respect and enjoy each other's company. These experiences and products that both drinkers and non-drinkers can enjoy equally, promotes an inclusive, positive drinking culture. SUMADORI Bar in Shibuya, Tokyo, specializes in beverages with low (0.5% or 3%) or no alcohol content, with a diverse menu of drinks, including artisanal cocktails, in a welcoming environment. In 2025, SUMADORI expanded with "SUMADORI Me" pop-up bars in Japan and South Korea, featuring original cocktails and workshops that help participants discover drinks based on their alcohol preferences and taste.

WHAT THE NUMBERS SAY

63% of consumers globally agree that they spend a lot of time on their own, rising to 75% in the US, and 70% among Gen Z around the world. **38%** agree that they are "often lonely", again rising to 41% in the US, and 46% in Brazil. 50% of Gen Z respondents around the world agree that they are often lonely. **50%** of our respondents agree "I don't really know the people in my neighborhood", rising to 57% in Japan but dropping back to 43% in the UK and 39% in India. Interestingly, older generations appear to be retaining their social connections into later life; Boomers are significantly less likely not to know their neighbors (40%) versus Gen Z at 56%. Globally, **40%** of respondents agree that they feel more connected to their online communities than the people in their neighborhood, rising to 50% of Millennials and 54% among Gen Z.

53% agree "I appreciate it when brands engage in relevant ways with the communities that I feel connected to", rising to 65% among both Millennials and Gen Z. Those community connections can pay back in meaningful ways, as **67%** of consumers agree that "I'm more likely to respond to content that feels personalized to my interests." Consumers in India (82%), China (86%), Brazil (74%) and the US (74%) claim to be particularly likely to respond to brands engaging them via their passions and interests.

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

63%

AGREE "I SPEND A LOT OF TIME ON MY OWN"

38%

AGREE "I AM OFTEN LONELY"

50%

AGREE " I DON'T REALLY KNOW THE PEOPLE IN MY NEIGHBORHOOD"

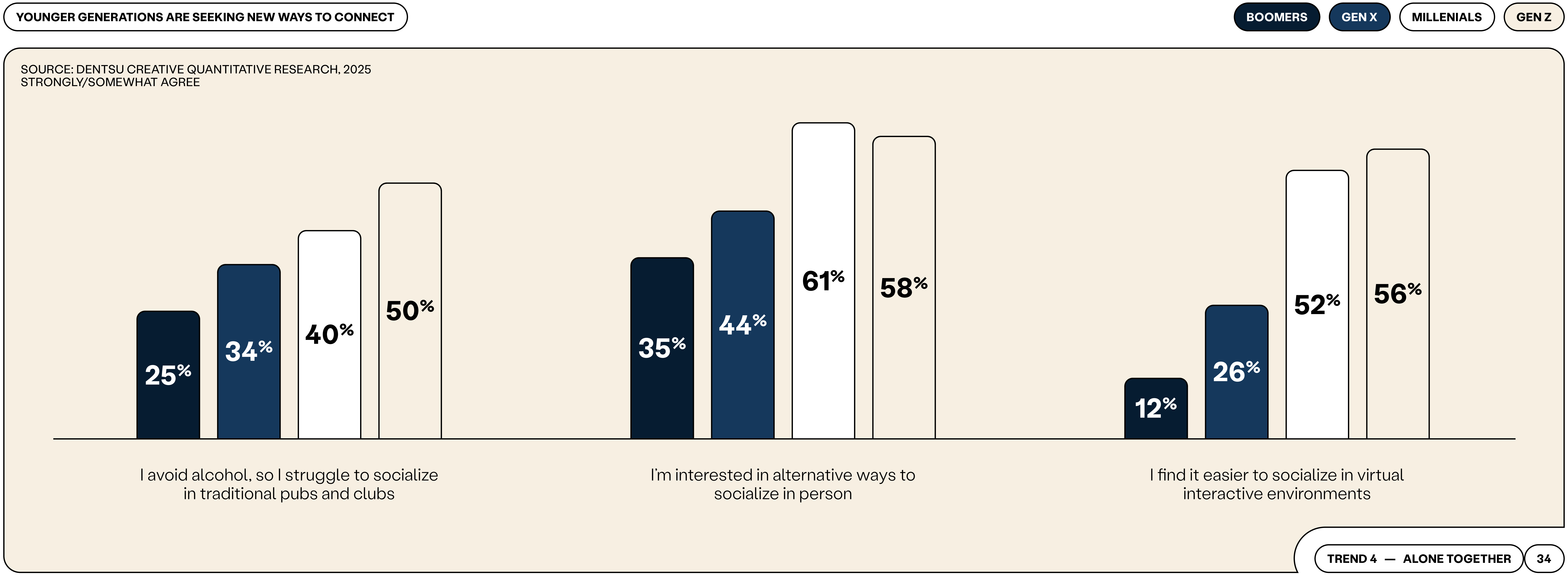
WHAT THE NUMBERS SAY

Attitudes to alcohol, third spaces, and social connections show significant variations across demographic cohorts. We see a stark generational shift post Gen X in terms of "sober curious" attitudes and alternative social events beyond defaulting to pubs or clubs. **37%** of the global audience agree "I avoid alcohol, so I struggle to socialize in traditional pubs and clubs" but that rises sharply to 50% among Gen Z. The sober curious phenomenon, defined as those who agree "I'm interested in alternatives to alcohol, such as low/no alcohol drinks with natural stimulants" similarly accelerates across generations, with **41%** agreement at the global level dropping to 24% among Boomers and rising to 49% among Gen Z.

As a result, **50%** of respondents around the world agree "I'm interested in alternative ways to socialize with people in person, like book groups, running clubs or classes", reaching 61% among Millennials and 58% among Gen Z.

Finally, we see that coming of age in a virtual environment has also impacted a generation's comfort with connecting in physical spaces, much as they may crave it. **37%** of respondents globally agree that they find it easier to socialize in virtual environments, rising to a sobering 56% among Gen Z.

YOUNGER GENERATIONS ARE SEEKING NEW WAYS TO CONNECT



III. ISLANDS IN THE STREAM

Streamers and retailers alike are recognizing the power of individual experiences, and influential voices to connect the dots amidst media fragmentation, recognizing that cultural phenomena are built through mosaics of shared bite sized content, Netflix's recent "Moments" function enables consumers to clip and share any moment from their content.

More broadly, "Clipping" is a new distribution and revenue model designed to engage Gen Z's fragmented attention "Clipping has become a huge part of the social media ecosystem — it's studios and streamers doling out bite-size scenes from their libraries through official (and under-the-radar) means", (The Ankler, Sept 2025).

In parallel, individual streamers are taking on entertainment giants, earning the rights to major sporting events and building their own retail empires, disrupting long-held authority and gate keeping. Streamers have been granted the rights to broadcast major sporting events such as the Bundesliga and the 2026 Fifa World Cup™, creating huge opportunity (and fragmentation) in the world of sportscasting. Meanwhile, Sephora are enabling individual influencers to curate and monetize their own storefronts. My Sephora Storefront is an integrated affiliate platform inviting shoppers and influencers to share beauty product recommendations and own the relationship - a shrewd move given that social commerce now drives 68% of beauty sales globally.[28]

INDIVIDUAL STREAMERS ARE TAKING ON ENTERTAINMENT GIANTS, EARNING THE RIGHTS TO MAJOR SPORTING EVENTS AND BUILDING THEIR OWN RETAIL EMPIRES, DISRUPTING LONG HELD AUTHORITY AND GATE KEEPING.

OUR WORK: TUSKER LAGER | STITCHED WITH CHEER

Dentsu Creative Kenya's campaign for Tusker Lager, "Stitched with Cheer", transformed fragmented fan engagement into a unified, personalized experience. As the official sponsor of Team Kenya, Tusker introduced the first team kit embedded with micro-LED strips that live-streamed real-time messages of support from fans directly onto Paralympians' uniforms. By leveraging an under-cap code and a companion app, the campaign empowered individual voices to create a tangible connection between consumers and athletes, blending traditional Maasai-inspired design with cutting-edge technology, reflecting the growing emphasis on authentic, interactive experiences that bridge digital and physical worlds, and showing how individual voices can unite through innovative platforms to inspire record-breaking performances and national pride.

WHAT IT MEANS FOR BRANDS AND BUSINESSES

CONNECTIONS THAT COUNT

Customers are craving connection, and hungry for new "third spaces". Brands that can create shared experiences, moments, and even physical spaces will be rewarded.

EMPOWER THE CONNECTORS

Creators and influencers provide vital social and cultural glue; smart brands are empowering and rewarding them far beyond campaigns, giving them a shared stake in commercial success.

EVERYDAY PARTY PEOPLE

As behaviors change, product portfolios must change with them. Low/no alcohol solutions show how quickly the drinks industry has pivoted to embrace new patterns, while Starbucks, for example, have called time on pick-up only stores, stating that the approach lacks "the warmth and human connection that defines our brand."

IMAGE CREATED WITH ADOBE FIREFLY

ANALOG FUTURES

5. ANALOG FUTURES

IN RESPONSE TO A WORLD GOVERNED BY ALGORITHMS AND INFUSED WITH AI, WE SEE SOME YOUNGER GENERATIONS EMBRACE A MORE ANALOG EXISTENCE; OR AT LEAST AN ANALOG AESTHETIC.

Across age groups people are trying out ways to live pre-digitally with stripped down technology and increased friction that disrupts the impulse to stream and scroll. The crafted, handmade and curated becomes a way to engage slowly and meaningfully with culture. The devices of previous generations are experiencing a revival, from the Polaroid cameras to the Walkman to the landline. Eco-conscious young people are declaring themselves "AI Vegans" while fashion brands are declaring war on the homogeneity of the algorithm.

Our Analog Futures trend picks up and circles back to our trends tracking nostalgia and anti-algorithm strategies.

OUR SUBTRENDS

SUBTRENDS

I. NEO-LUDDITES

THE DESIRE TO DISCONNECT FROM OUR DEVICES

↓

II. THE ANTI-ALGORITHM

A SEARCH FOR TASTE, INDIVIDUALITY, SERENDIPITY

↓

III. THE WAY WE WERE

NOSTALGIA FOR SIMPLER, MORE CONNECTED TIMES

I. NEO-LUDDITES

In response to an online world that feels less safe and inclusive, many younger consumers are exploring more analog approaches. Startups such as "Brick" (a device that temporarily removes digital distractions and notifications from your phone) are tapping into a desire both for safety, and to feel present and focused in the real world. American startup Tincan is a wired-in phone and "telephone" club of approved numbers for young friends to chat together through voice, not text. KARRI is a screen-free phone alternative where kids can send voice messages to another device or parents' app. The Snowsky Echo Mini is an MP3 that echoes the aesthetic and tactile nature of early personal stereos such as the Walkman.

Younger audiences need little coaxing - 47% of 16 to 21-year-old Brits would prefer to be growing up in a pre-internet era (BSI, 2025)[29], The town of Toyoake in Japan introduced a measure encouraging its residents to limit their smartphone use to two hours a day. Gen Z and Gen Alpha are choosing to embrace pen pals, craft subscriptions, and handwritten notes. In the US, Latin Grammy winner Joaquina partnered with retailer JCPenney on a "back to school" collection complete with a journaling station. In the luxury space, prestige accessories brand Anya Hindmarch launched an 'Anya's Tuck Shop' concept store with branded products and a retail experience inspired by retro British sweet shops.

IN RESPONSE TO AN ONLINE WORLD THAT FEELS LESS SAFE AND INCLUSIVE, MANY YOUNGER CONSUMERS ARE EXPLORING MORE ANALOG APPROACHES.

OUR WORK: IKEA | BONDING INSTRUCTION

IKEA's "Bonding Instruction" campaign by Dentsu Creative Indonesia reimagined the brand's iconic assembly manuals as storytelling tools designed to foster family connection. By transforming a utilitarian, algorithm-free activity - assembling furniture - into a playful, collaborative experience with kid-friendly visuals and tactile engagement, the campaign celebrates slower, hands-on interaction in a world dominated by digital convenience, echoing the nostalgia for pre-digital rituals and the desire for meaningful, crafted experiences that disrupt passive scrolling and revive the joy of making together.

II. THE ANTI-ALGORITHM

As consumers become more aware of the role of the algorithm in shaping their newsfeeds and shopping baskets, we see brands and consumers alike striving for individuality and serendipity. Anti-algorithmic dating is on the rise with dating app users experiencing frustration and apps experiencing a decline in users.[30] Consumers are pursuing anti-algorithmic dating techniques instead such as friendship bracelets customized with phone numbers.

Fashion brands and magazines have charted the rise of anti-algorithmic fashion, as Alexander Fury puts it: "The big idea – and it was a big idea – behind Miuccia Prada and Raf Simons' Spring/Summer 2025 Prada show, possibly the first inspired by the dictatorial influence of 21st-century algorithms".[31]

We see this rise from the bottom up - London is about to open the Museum of Youth Culture to celebrate the history of rebellious subculture on the global stage from punks to the new romantics to acid house. Vogue reports on the "rise of anti-trend" dressing as exhausted shoppers check out of fast-moving fads and lean towards timeless pieces that reflect your own style.

Polaroid touched a cultural nerve with its call to acknowledge that "AI can't generate sand between your toes". Other campaigns pay homage to the hands and generational, earned skill behind the work. Fine art materials brand Faber-Castell's "Shot on Faber-Castell" campaign features images sketched in extraordinary photo-real detail with a playful nod to Apple's "Shot on iPhone" campaign.

Meanwhile luxury brands play with paper crafts, sketches and claymation, with Hermès declaring their "creativity will be guided in 2025 by the theme of "Drawn to Craft"", and embracing a hand-drawn aesthetic and pop-up art classes.

AS CONSUMERS BECOME MORE AWARE OF THE ROLE OF THE ALGORITHM IN SHAPING THEIR NEWSFEEDS AND SHOPPING BASKETS, WE SEE BRANDS AND CONSUMERS ALIKE STRIVING FOR INDIVIDUALITY AND SERENDIPITY.

TREND TRAJECTORIES

TRENDING

Analog technologies and techniques, from the Walkman to the Polaroid.

TIMELY

Growing concern over the impact of technology on mental health and social connection.

TIMELESS

The emotional appeal of all things tactile and hand-crafted.

TOMORROW

The impact of constant connectivity on childhood will continue to dominate policy conversations and newspaper headlines. Craft and imperfection will provide important emotional and tactile stimulation, with switching off seen as perhaps the ultimate luxury.

WHAT THE NUMBERS SAY

Globally, **40%** of respondents agree that "The online world feels so stressful that I try to switch off as much as possible." Among those markets trying hardest to switch off are Brazil (47%), the US (47%) and the UK (48%), while those who identify least with the idea of switching off are China (16%) and Japan (30%). Generation Z are the most likely cohort to seek time to switch off, at 45% agreement. **50%** of the consumers surveyed agree that they try to ration their own screentime, with Brazil, India and Spain most likely to be talking steps to address their screen time. Once again, the desire to disconnect is strongest among younger audiences, at 52% for Gen Z and 60% Millennials. While **29%** of respondents worldwide are "interested in trying "dumb" devices like "brick" phones or old fashion MP3 players; that figure rises to 45% among Gen Z.

When it comes to online safety, **50%** of all respondents agree "I won't let my child have a smartphone until they're a teenager" while significant numbers believe that social media should be more tightly regulated for under 16s. Intriguingly, it is younger generations, raised in a digital world, who are more likely that their parents or grandparents to seek controls around constant connectivity for the generations to come. In the push back against algorithmic optimization, **55%** of respondents agree "I'm tired of the algorithm recommending more and more of the same." India (63%), Spain (63%), the US (62%) and Brazil (61%) are most likely to crave difference. The sentiment is remarkably consistent across demographics, with 55% agreement among Boomers through to 57% among Gen Z.

SOURCE: DENTSU CREATIVE QUANTITATIVE RESEARCH, 2025

40%

AGREE "I TRY TO SWITCH OFF AS MUCH AS POSSIBLE"

50%

AGREE "I TRY TO RATION MY OWN SCREEN TIME"

50%

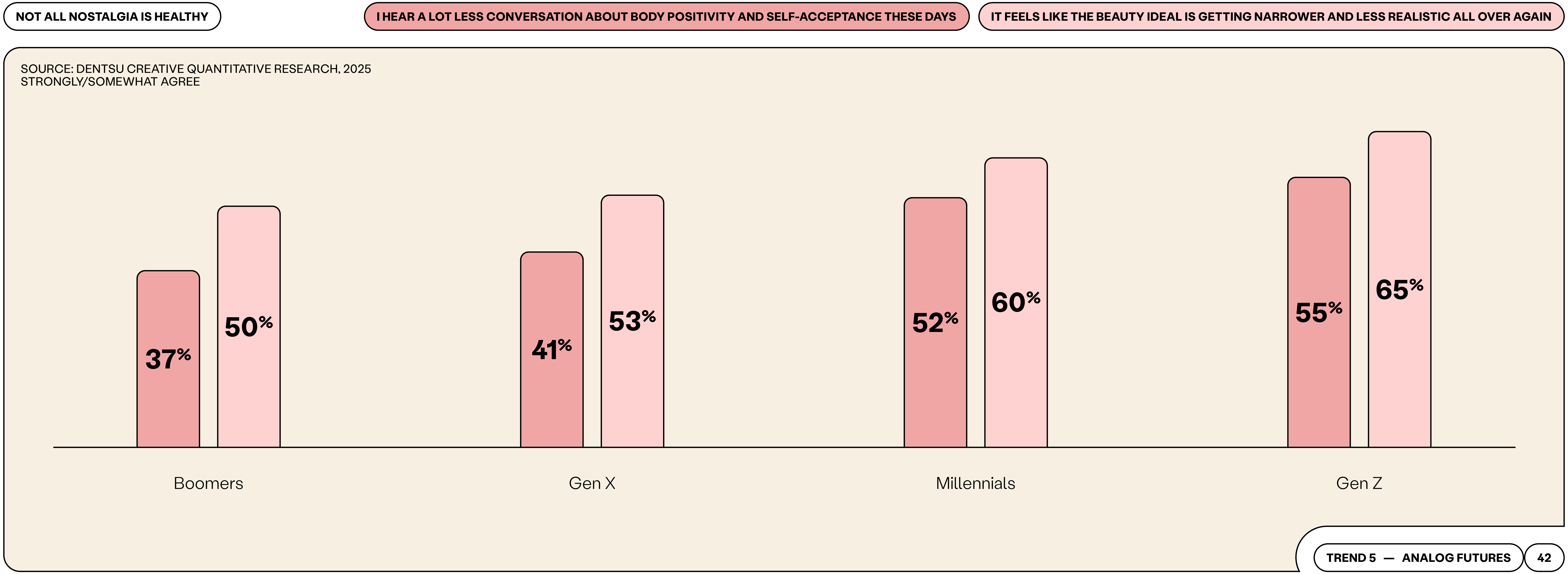
AGREE "MY CHILD WON'T HAVE A SMARTPHONE UNTIL THEIR TEENS"

WHAT THE NUMBERS SAY

While the desire to switch off is certainly part of the allure of 90s and 00s nostalgia, there is also a strong sense that life was more fun, and a desire to recapture lost hedonism. **66%** of respondents agree that "people had a lot more fun in the 90s and 00s", while **68%** agree that "life is too short not to indulge yourself".

Nevertheless, there is a recognition that not all throwbacks are healthy, with **46%** agreeing that "I hear a lot less conversation about body positivity and self-acceptance these days" rising to **55%** among Gen Z, and **57%** agreeing that "It feels like the beauty ideal is getting narrower and less realistic all over again", rising to 65% among Gen Z.

NOT ALL NOSTALGIA IS HEALTHY



III. THE WAY WE WERE

Nostalgia remains a powerful mode of escapism in daunting times, with the 90s and noughties a strong theme in this year's trends, sparked in part by Oasis' cultural resurgence. Millennials are looking back with rose-tinted glasses towards a time where the future felt promising, culture was brash and confident, plans were made on payphones and things were cheaper. We see this manifest in unashamed nostalgia - the UK has been remembering the era of "Cool Britannia" whilst international KPop band Katseye earned plaudits for their Y2K throwback ad for GAP. John Lewis' highly anticipated Christmas spot features 1990s club anthem "Where Love Lives", using a remixed track and emotive storytelling to bridge generations. Smart brands are combining culture and cost savings - Instacarts' "Summer Like It's 1999" campaign featured prices from 1999 whilst Taco Bell's Decades Y2K Menu similarly featured retro items at retro prices.

We see the trend filter down to Gen Z and Gen Alpha through cultural osmosis and experiments in "90s parenting" characterized by less overscheduling, more space for play, inventing your own entertainment and prioritizing memory-making over content creation. We've even seen parents custom-build Blockbuster video rental stores in their homes... As director Darren Aronofsky puts it: "The 90s were such a remarkable time to be alive... we weren't all living in a state of existential terror".[32]

Not all throwbacks are healthy though, with a resurgent interest in narrow, unhealthy beauty norms and unhealthy habits such as smoking and tanning. A recent survey showed that 43% of 18-25 year olds in the UK are using sunbeds[33] while faux sunburn and tan lines have appeared on the catwalk.

Gloomy economic prospects see folk abandoning the pension pot in place of a "live for today" mentality. Charli XCX's highly influential "brat" outlook alongside the resurgence of late 90's music coincided with the launch of retro brands like alco-pop pioneer Bacardi Breezer. Diet Coke is also seeing cultural momentum, embracing retro packaging and iconic 80s flavours to become "the trendiest drink of 2025", according to Cosmopolitan.

There is a collective feeling that the wellness movement has become too exclusive, expensive, and joyless whilst the rise of GLP-1s makes a quicker fix readily available. GLP-1s are also influencing dining habits; Heston Blumenthal has launched a new tasting menu, The Mindful Experience at his flagship restaurant designed for diners taking weight loss and appetite suppressants.

OUR WORK: SUBWAY | HAPPY GILMORE

By reviving beloved characters like Shooter McGavin and creating immersive offline activations - such as a Santa Monica pop-up transformed into Happy Gilmore's "Happy Place" complete with mini-golf - our integrated campaign for Subway and Happy Gilmore 2 offered fans a chance to engage physically and socially. The retro appeal of the original film, combined with gamified web elements and limited-edition merchandise, reflects a longing for simpler, more playful times, fostering meaningful cultural connection.

WHAT IT MEANS FOR BRANDS AND BUSINESSES

RESPECT THE DISCONNECT

The desire to disconnect and rising concern over the impact of constant connectivity on the mental health of younger generations will grow ever more urgent. Brands that champion a healthier, safer relationship with online media will reap the benefits.

ROMANCE THE ARCHIVE

The power of nostalgia remains robust year on year as customers crave the simplicity and cultural connectedness of previous generations. Brands may find new inspiration from reaching into their archives, both in terms of product reinvention and advertising assets.

RESIST THE NORM

The anti-algorithm movement prioritizes personal taste and curation over pristine and polished experiences. Brands that can share unexpected stories or embrace distinctive craft have potential to win with the audience and win with the algorithm.

SO, WHAT CAN WE CONCLUDE FROM THE SWIRL OF TREND AND COUNTER-TREND? AS WE TOUCHED ON AT THE OUTSET, SOME MACRO THEMES UNDERPIN TODAY'S TRENDS, AND TOMORROW'S.

The cost of living and ongoing inflationary pressures underpin even trends that at first glance feel like the pinnacle of indulgence. Ongoing societal and media fragmentation fuel both the desire for in person connection and an increased reliance on virtual companionship. Meanwhile the inexorable rise of AI is accelerating a long-developing desire to reconnect with the outdoors and with all things hand-crafted. We see both a sometimes alarmingly intense relationship with technology and a conscious switching off and stepping away.

As ever, the challenge is to recognize which trends will have a lasting impact on our brands and businesses, which can be short term revenue drivers with a finite lifespan, and which may spark a fleeting meme or moment.

By understanding the drivers behind the trends that bubble to the surface, we can learn how to win with the algorithm, not follow the algorithm. Solving for the trend behind the trend enables brands to lead, not lag.

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METHODOLOGY

We surveyed nationally representative panels of consumers (according to the latest available census numbers for each country) using Toluna, an online research panel. This report features data from a global panel of 4,500 consumers across 7 countries: 1,000 consumers in the US and Japan, respectively, and 500 consumers, respectively, in Brazil, China, India, Spain, and the UK. The data was collected between October 25th and November 4th, 2025.

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