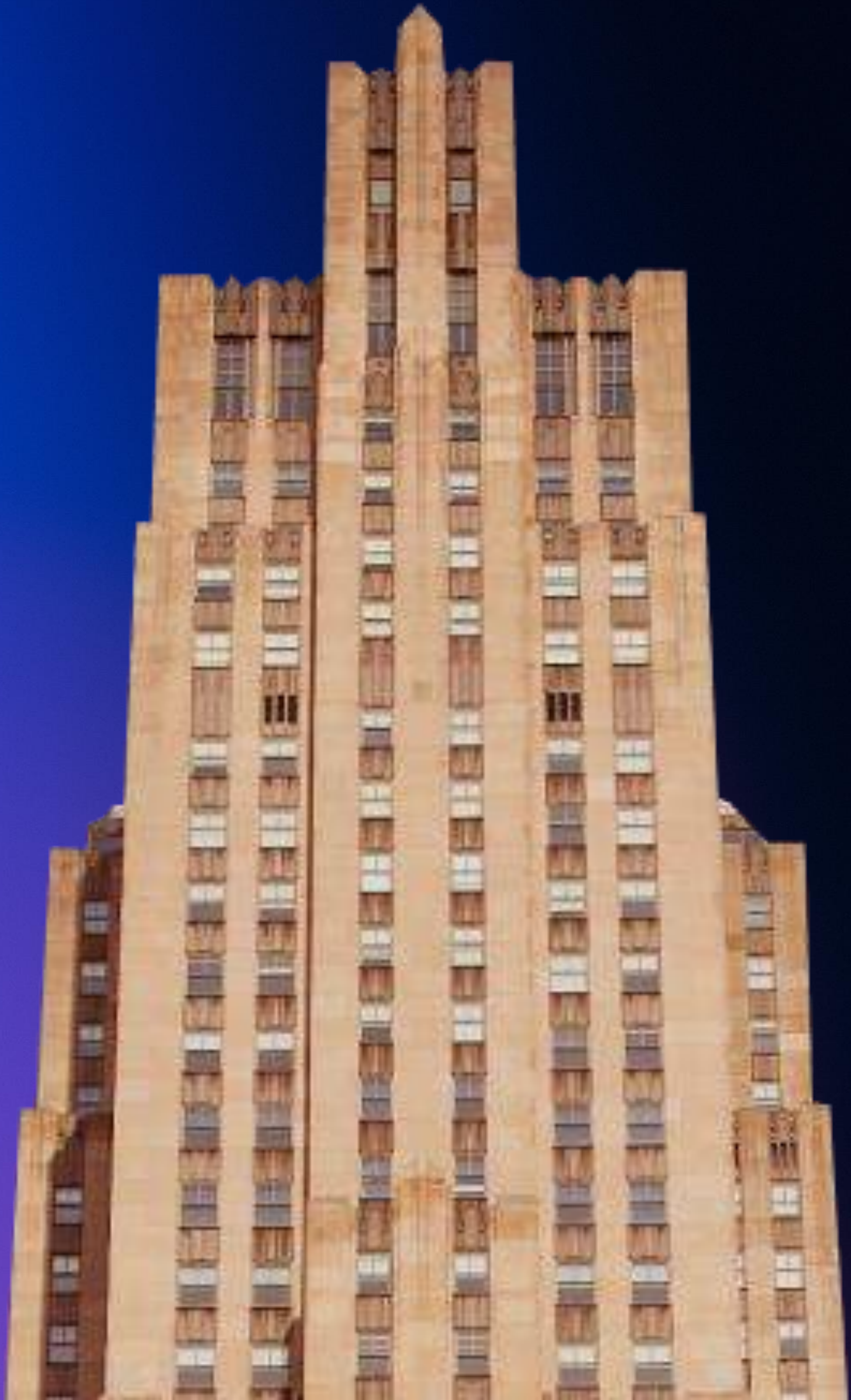
2026 CATEGORY + MARKETPLACE HOT TOPICS

as of January 30, 2026



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2026
Category + Marketplace Hot Topics

This deck highlights the 'hot topics' likely to shape business and marketing priorities over the next year, including:

Looking Back: 2025 Hot Topics
Key dynamics and learnings from the past year

2026 Marketplace Hot Topics
How the economic and advertising landscapes are evolving

2026 Cross-Category Hot Topics
Industry-wide themes anticipated to impact businesses across sectors

2026 Category Hot Topics
Trends expected to shape category behavior in the year ahead

Click for slide

Marketplace
Auto
Beauty & Personal Care
Beverage
CPG
Finance
Insurance
Luxury
Pharma
Restaurant
Retail
Studios
Tech
Telco
Travel

LOOKING BACK
2025 Hot Topics

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LOOKING BACK: Hot Topics from 2025

2025 was a year of transition, marked by leadership changes, media shake-ups, evolving utility of AI, & rising demand for emotional connection.

Massive Speculation

Ongoing uncertainty drove active debate around potential economic & marketplace scenarios that could meaningfully impact businesses, consumers, demand, and investment decisions.

Examples

Tariff policies & impacts
Consumer confidence
Global geopolitical dynamics
Election of the new pope
M&A (e.g.. Paramount, WBD)
Fate of TikTok

Monocultural Bursts

In today's more fragmented, algorithm-driven media landscape, we experienced shorter, but more intense moments of shared cultural relevance & conversation across generations and diverse social circles.

Examples

Kendrick Lamar Super Bowl Halftime
Labubus
"Popewatch"
Coldplay Kiss Cam
Jimmy Kimmel
The Louvre Heist

Artificial Intelligence Realized

AI evolved from novel curiosity to everyday utility as consumers integrated it more into routine behaviors & decision-making.

62%

of U.S. adults used AI tools in 2025 *+9ppt YoY.*[1]

63%

of U.S. adults interacted with AI at least several times a week as of June 2025 *+14ppt vs. Feb 2024.*[1]

"Treatonomics"

While experiences remained highly valued, tighter budgets pushed consumers toward low-cost, high-delight purchases or experiences offering a sense of discovery, connection, & emotional payoff.

7/10

of consumers treated themselves to small indulgences to deal with financial pressure[2]

84%

of consumers prioritized small joyful moments to balance life's seriousness[3]

Source: 1. MRI Simmons Digital Life Study 2025, Pew Research Center 2025, 2. Capgemini 2026 3. Human8 What Matters 2025

LOOKING BACK:
How 2025's Biggest Themes Came to Life Across NBCU

Massive Speculation

Ongoing uncertainty drove active debate around potential economic & marketplace scenarios that could meaningfully impact businesses, consumers, demand, and investment decisions.

As uncertainty intensified, audiences turned to Versant's news brands for trusted context during pivotal economic & political moments.

CNBC — April was the highest rated month in over 3 years amid tariff announcements & market volatility

MS NOW — Election Night 2025 experienced #1 cable PT viewership

Monocultural Bursts

In today's more fragmented, algorithm-driven media landscape, we experienced shorter, but more intense moments of shared cultural relevance & conversation across generations and diverse social circles.

NBCU delivered content-focused monocultural bursts that dominated conversation and engagement across platforms.

love island — #1 most social program across TV & Streaming

WICKED — #1 movie on all streaming on premiere weekend

Artificial Intelligence Realized

AI evolved from novel curiosity to everyday utility as consumers integrated it more into routine behaviors & decision-making.

NBCU continued to operationalize and embed AI into newly launched and announced offerings that translate real-time engagement into measurable impact.

ADWEEK

NBCU Showcases New AI-Powered Ad Offerings Ahead of 2026 CES

EM EMARKETER

NBCU unveils agentic AI system to plan and optimize TV in seconds

"Treatonomics"

While experiences remained highly valued, tighter budgets pushed consumers toward low-cost, high-delight purchases or experiences offering a sense of discovery, connection, & emotional payoff.

Community-driven experiences, whether in-person or digital, provided accessible avenues for audiences across various demographics to participate in the fandoms they love.

419M
BravoCon cross-platform engagements, +43% YoY

60K+
Fans visit the TODAY Plaza each year

MARKETPLACE
HOT TOPICS

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2026 Marketplace Predictions

OPTIMISTIC | BALANCED | PESSIMISTIC

While the U.S. economy has demonstrated resiliency in 2025, policy uncertainty & economic indicators point to a cautious 2026.

Macroeconomic Trends

U.S. GDP growth may continue to slow due to tariff & inflation pressures, but consumer spending growth demonstrates notable economic resilience.

Inflation rates

Inflation may stay ~3% after December's cut, with the Fed eyeing 1–2 more cuts in 2026, possibly at odds with President Trump's push for faster reductions.

(Reuters, CNBC)

Tariffs

2025 tariffs were largely absorbed by firms, with higher prices for consumers expected in 2026.

(PIIE, EY Parthenon)

Employment

Unemployment ended 2025 at 4.4% and is expected to rise slightly in 2026 before stabilizing.

(Bureau of Labor, Fortune, WSJ)

Consumer Spending

Consumer spending is modest, led by higher-income households, reflecting a continued K-shaped recovery.

(Bank of America, U.S. Bank, St. Louis Fed, TheStreet)

Looking to the Future

Consumer spending & AI investment continue to fuel growth, while labor market softness, persistent inflation, and policy uncertainty weigh on outlook.

+ Inflation will gradually ease but remain above the Fed's 2% target. Softer Dec. CPI (consistent with Nov. 2.7%) supports hopes for alignment with the Fed's predictions.

− Tariffs are expected to drive broader price increases through 2026, with the large impacts on home goods and furniture, apparel and footwear, consumer electronics, and home maintenance and construction products.

= In 2026, current trends are expected to persist, with slowing labor growth, cautious consumer and business spending, and increasing adoption of AI, as two-thirds of CEOs report plans to maintain or reduce headcount.

+ Consumer spending is expected to remain steady, supported by larger tax refunds in 2026 and continued corporate investment, though discretionary purchases may slow as value-driven shopping grows.

2026 **MARKETPLACE** Predictions

Beyond regulatory and economic impacts, here are **4 key trends** we expect to impact advertisers across marketing strategy, reach objectives, and budget optimization.

Ad Market Resilience

The U.S. ad market is expected to see moderate, resilient growth in 2026, led by digital video and retail media.

Brands that stay invested through uncertainty are better positioned to gain share, while AI-driven tools continue to improve targeting, efficiency, and measurement—accelerating the shift toward performance-focused, ROI-driven campaigns.

5-9%

projected growth of the U.S. ad market in 2026.[1]

Gen AI Powers Smarter, Targeted Advertising

As Gen AI scales in 2026, advertising is becoming more intelligent and outcome-driven.

NBCU's AI-powered Contextual Targeting in Live offering exemplifies this shift, enabling brands to deliver the right message in the right moment—driving greater efficiency, agility, and precision.

39%

of digital video ads are projected to be built using Gen AI in 2026.[2]

Consolidation Reshapes Media Landscape

As consolidation continues across agencies and media companies in 2026, content power is becoming more concentrated, driving new operating models and partnerships.

In response, brands are adapting strategies, optimizing relationships, and increasingly leveraging AI to maintain control, efficiency, and impact across their media investments.

86%

of CMOs expect their marketing budgets to increase across streaming, OOH, & RMN over the next year.[3]

Tentpoles Accelerate Premium Growth

Tentpole moments will continue to drive premium video growth in 2026, with live sports and marquee events, such as the World Cup, drawing massive, highly engaged audiences.

Political advertising, including the midterms, is expected to drive significant incremental spend, while Spanish-language audiences represent a key growth opportunity across both sports and political programming.

71%

of U.S. Hispanic voters report not seeing any Spanish political ads ahead of the 2026 midterm elections.[4]

Sources: 1. Cross industry sources including IAB, Dentsu, Magna, WARC etc.; 2. IAB 3. Dentsu 4. TelevisaUnivision

CATEGORY
HOT TOPICS

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2026 Hot Topics: Cross-Category Trends & Themes

Key themes that will have industry-wide business & marketing impact

Redefining the Human Factor

Rising demand for human-first connection will accelerate in-person engagement and more personable brand strategies.

- Finance
- Insurance
- Luxury
- Retail
- Tech

The Start of AI Normalization

AI is integrating further into the everyday—from agentic workflows to optimization—becoming both more effective & seamless.

- CPG
- Insurance
- Luxury
- Pharma
- Retail
- Tech
- Telco
- Travel

Brand Loyalty in a Divided Market

As the bifurcated consumer divide widens, brand loyalty is challenged by rising costs, expanding choice, and higher expectations.

- Auto
- Insurance
- Luxury
- Retail
- Studios
- Telco

Wellness Gets Measured

Consumers are prioritizing data-backed goals and tangible results over vague well-being promises.

- Beauty & Pers. Care
- Beverage
- CPG
- Finance
- Pharma
- Restaurant
- Travel

2026 AUTO Predictions

These are 5 key topics as the auto industry balances the push and pull between consumer and seller control as well as an evolving policy landscape.

Loyalty Drop-Off

As consumers desire more choice and less commitment, loyalty to brands, powertrains, and models is declining.

Nurturing core relationships and expanding into growth audiences will be critical to long-term market resiliency.

+10pps

YoY growth in consumers who say they consider 3+ brands when starting the car-buying process, reaching 53% in 2025[1]

The Affordability Divide

In today's K-shaped economy, higher-income buyers drive the auto market as affordability pressures lead others to delay purchases and hold onto cars longer.

Media strategies that pair brand building with performance will engage both future and active buyers.

-11pps

decline in share of new vehicle sales to <$75k HHIs in 2025 vs. 2019; >$150k gained +13pps[2]

EV Reality

Autos are entering a state of realism on EVs, recalibrating expectations and balancing demand with policy changes, shifting focus across fuel types, especially hybrids.

Autos will continue to seek flexible ad opportunities as they adapt messaging in an evolving landscape.

2x

Hybrid share of sales was nearly twice that of pure EVs in 2025 (16% for hybrids vs. 9% EVs)[3]

Rethinking The Road To Purchase

While consumers value in-person car buying, digital tools are playing a bigger role. 3rd party retailers face growing competition as new buying models & agentic AI emerge.

Innovative advertising tactics that help brands stand out will bring the buying experience directly to consumers.

80%

of buyers and sellers are open to using AI to support their vehicle purchase decisions, with 26% already using it[1]

The Auto & Tech Collision

Brands are ramping up robotics investments, advanced sensors, and AI to modernize production and autonomous capabilities as they prepare for the future.

Premium content and events can be a platform for brands to promote new capabilities and reinforce positioning as leaders in the future of tech & mobility.

48%

of the world's top automakers are already piloting advanced robotics in their factories[4]

Source: 1. CarGurus; 2. Cox Auto; 3. S&P Global; 4. Gartner

2026 **BEAUTY & PERSONAL CARE** Predictions

Beyond regulatory shifts, these **5 key topics** highlight how BPC brands are moving toward biotech innovation, long-term performance, and hyper-personalized care.

The Longevity Era

Consumers are moving away from aggressive "quick fix" peels and toward regenerative actives with the focus on skin longevity.

Brands must shift their narrative from erasing wrinkles to extending skin healthspan, opening an opportunity for dermocosmetics.

41%

of U.S. consumers who use beauty supplements say they want to accomplish longevity as a health improvement goal.[1]

The Skin-Mind Connection

Personal care is being redefined as a mental health tool, acknowledging that stress-induced cortisol is a primary driver of skin inflammation and aging.

Brands can own new emotional occasions (e.g., the post-work decompression ritual), focusing on skin calm and barrier repair as a response to the burnout lifestyle.

64%

of U.S. facial skincare consumers agree that they have noticed their stress levels affecting their skin (e.g., dullness, acne).[2]

Clean Beauty 2.0

Clean is pivoting to biotech performance. Consumers are increasingly open to biotech-driven, lab-grown bio-identical ingredients that deliver both sustainability and clinical performance.

As clean beauty evolves, brands are expected to go beyond “free-from” claims and focus on ingredient literacy—explaining the "why" and "how" of every molecule.

53%

of U.S. beauty and personal care consumers say they are interested in lab-derived, synthetic ingredients.[3]

The Rise of Predictive Beauty

"One-size-fits-all" is being replaced by data-driven routines. AI-powered skin scanning and hormone-syncing apps are becoming mainstream as consumers expect their routine to change based on real-time data.

Predictive beauty leverages high-intent, first-party data to replace broad targeting with hyper-personalized marketing that drives efficiency

42%

of consumers would switch to a beauty brand that could proactively anticipate their needs.[4]

Anti-Algorithm & Raw Realism

Consumers are developing "filter fatigue" and actively rewarding brands that show flaws. Beauty brands are ditching skin-smoothing filters for high-definition shots of pores and texture.

Brands that embrace “performative vulnerability” build deeper trust via authenticity.

1 in 3

women report feeling pressure to alter their appearance because of what they see online, even when they know images are AI-gen or filtered.[5]

Source: 1. Mintel – American Lifestyles – U.S. 2025; 2. Mintel Facial Skincare – US – 2024; 3. The Sustainable Beauty Consumer – U.S. – 2025; 4 New Beauty / Gen AI Beauty Consumer Study (2025) ;5. Dove

2026 **BEVERAGE** Predictions

Beyond regulatory shifts, these **5 key topics** highlight how brands are balancing convenience, functional value, and intentionality to capture the evolving modern consumer.

Choice Fluidity

Brands are launching unified portfolios where the same brand logic applies to 0.0%, low-ABV, and full-strength versions. Consumers are "zebra-striping" (alternating between alc and non-alc) within a single evening.

Growth will come from portfolio strategy rather than single-SKU success.

92%

of non-alcohol buyers also purchase alcohol, supporting the idea that consumers are redistributing consumption across formats over time.[1]

The Rise of Intentionality

Alcohol is losing its status as the social default. Drinking is moving to a deliberate, occasional choice, driven by a generational shift in health perception.

Volume-based growth models are under pressure. Brands must pivot to value over volume, focusing on premiumization, smaller formats and high-end associations.

54%

a record-low 54% of Americans say they drink alcohol, as a majority now believe moderate drinking is unhealthy.[2]

The Functionality Takeover

The market is shifting from refreshment to bio-hacking, with ingredients like magnesium for calm, lion's mane for focus, energy, and probiotics for gut health becoming standard.

Brands can no longer win on taste alone. Innovation must shift from new flavor launches to benefit-led platforms.

75%

of functional drink consumers believe brands should do more to explain benefits of these ingredients.[3]

Beverages as Mood Tools

Beverages are increasingly used as "liquid tools" to manage the stress and cognitive demands of modern life. Alcohol no longer holds the monopoly on "winding down".

Brands need to map their products to "need states" rather than time-of-day, (e.g., energy, relaxation, celebration).

45%

of U.S. consumers look for mood-boosting benefits when choosing an alcohol alternative.[4]

Price Sensitivity vs Efficiency

Consumption is shifting toward convenience and value, as seen in the growth of ready-to-drink options alongside a surge in concentrates and multipurpose powders that offer cost-effective formats.

Pack architecture is now a primary growth lever. Value packs appeal to families, while Gen Z prefers smaller, "aesthetic" single-serves.

53%

of U.S. consumers would rather see smaller package size than higher prices.[5]

Source: 1. NielsenIQ; 2. Gallup; 3. Mintel - Non-Alcoholic Beverages Occasions – U.S. – 2025; 4. Mintel – Alcohol Alternatives – U.S. – 2025; 5. Mintel – Food Packaging Trends – U.S. - 2025

2026 **PACKAGED GOODS** Predictions

Beyond regulation & tariffs, these **5 key topics** highlight how brands are adapting to new consumer needs for value and tech-driven convenience.

The Fiber Frenzy

While protein remains a staple, fiber has become the most talked-about macronutrient as a primary tool for weight management, satiety, and metabolic health.

Driven largely by the mainstream use of GLP-1 medications, shoppers are looking for "natural" ways to maintain fullness and stabilize blood sugar.

54%

are interested in foods and beverages that are high in fiber, with Gen Z at 60% who are pioneering the "fibermaxxing" trend on social media.[1]

Texture-First Snacking

Consumers are seeking "texture layering"—products that offer high-contrast experiences like crispy + creamy or chewy + airy (e.g., Dubai-style chocolate bars).

For brands, texture is the new frontier of innovation to combat "flavor boredom" among Gen Z shoppers.

69%

of consumers agree that texture influences their snack cravings, making it a key consideration for innovation and product development.[2]

"Newstalgia" Mixed with Global Flavor

Shoppers are prioritizing the safety of childhood flavors but through a modern, sophisticated lens, blending the comfort of the familiar with the thrill of global exploration. Nostalgia acts as an emotional anchor. However, to keep it from feeling stale, brands are remixing these memories with third-culture influences (e.g. miso-caramel).

85%

of consumers say familiar or comforting flavors most influence their choices.[3]

Retail Media Convergence

Retail Media Networks are moving beyond the "sponsored search" bar on site to integrating into physical stores and living rooms via Shoppable CTV.

By moving into Shoppable CTV and streaming, brands can collapse the funnel—turning a lean-back living room experience into an immediate transaction.

40%

Retail Media CTV ad spend is forecasted to grow 40% in 2026.[4]

Agentic Commerce Goes Mainstream

Consumers are finding meal inspiration via GenAI, and delegating their shopping lists to "Agentic AI"—smart assistants that compare prices, check ingredients, and auto-refill essentials.

Traditional brand loyalty is under threat of AI agent recommendations rather than human-centric packaging.

63%

of consumers agree that using AI improves the shopping experience, and 84% anticipate AI will continue to change the shopping experience.[5]

Source: 1. CNBC; 2. Mintel - Snack, Nutrition and Performance Bars – 2025; 3. Food Dive; 4. eMarketer; 5. Mintel - AI's Influence on Retail – 2025

2026 **FINANCE** Predictions

Brand innovation and evolving consumer behavior are reshaping finance brand strategies and marketing opportunities through these **4 key topics**.

Wealth: From Product to Life-Centered

As wealth significantly shifts to younger generations and new investing demos enter the market, financial services are moving beyond transactional products toward a more holistic approach, integrating financial advice, planning, mgmt, etc.

Brands must reframe strategies & messaging to reach and connect with a new wave of investors with evolving expectations.

2x

the share of investors seeking more comprehensive, holistic financial planning services has nearly doubled since 2018.[1]

Prediction Markets go Mainstream

Prediction markets are rapidly evolving into a mainstream product, blending investing, betting, public opinion, news, and entertainment.

As this space matures, there will be increased emphasis on media & marketing support. There will also be more data partnerships between key media and prediction markets players due to predictive/forecasting capabilities across relevant news topics.

$44B

total prediction market volume reached in 2025, mostly split between top players Polymarket ($21.5B) and Kalshi ($17.1).[2]

Stablecoins Reshape Money Movement

As institutional stablecoin adoption increases, this will transform global money movement options, creating faster, cheaper cross-border payment and settlement rails.

This will expand beyond crypto into traditional payment networks. These brands should prioritize strategies and messaging highlighting new activation points around seamless commerce and payment experiences.

$250B

estimated stablecoin market size, up 22% in 2025.[3]

Brand Equity Through In-Person Experiences

As digital financial tools become the norm and digital fatigue kicks in, brands will double down on in-person experiences and events to deepen emotional connection and loyalty while differentiating themselves.

Financial brands should leverage experiential touchpoints as a premium engagement channel to elevate retention and distinction.

77%

of consumers report increased trust in a brand after attending a live experience.[4]

Source: 1. McKnisey 2. Forbes. 3. Morgan Stanley 4. ATN

2026 **INSURANCE** Predictions

These are **4 key topics** to be aware of as the insurance category continues to balance the customer experience with data, tech, and innovation.

Customer Satisfaction Becomes Key Focus

With rising premiums, growing mistrust and lower loyalty, insurers are facing increased churn and customer satisfaction is becoming more competitive.

Insurers must prioritize satisfaction-driven positioning and pivot messaging towards trust, transparency, and experience, not just price.

13%

shopping rate for auto insurance in Q3'25, with a record 4.5% of customers actually switching providers.[1]

AI Shifts Towards Customer Facing Tools

AI will continue to power operations like underwriting, pricing, and claims. However, usage will start shifting towards customer-facing tools like chat support and instant quotes.

As these AI capabilities evolve, brands can tailor their offerings and messaging to meet individual needs and deliver a highly personalized experience.

56%

of insurers are prioritizing Gen AI investments in direct-to-customer, personalized advertising and messaging.[2]

Embedded Insurance Continues to Grow

By seamlessly integrating insurance options within the purchase of non-insurance products and services, embedded insurance is rewriting the rules on how consumers buy, use, and benefit from insurance.

Brands can capitalize on this growing trend by showing up in the moments that matter and aligning messaging to the emotional state of the transaction (excitement, urgency, etc.).

1/3

more than 30% of all insurance transactions are projected to run through embedded channels by 2028.[3]

Usage-Based Insurance Becomes the Norm

Usage-based auto insurance will evolve into a new pricing norm, as drivers increasingly accept data exchange in return for lower premiums.

Insurers leaning into this trend will have more precise consumer data and can tailor messaging based on behaviors and outcomes (e.g. low-risk driving, savings on premiums).

82%

of policyholders view UBI technology positively and 52% would be willing to share this data to receive personalized pricing.[4]

Source: 1. JD Power 2. EY 3. WeForum 4. Insurance Journal

2026 **LUXURY** Predictions

These are **5 key topics** shaping the industry that's in a state of "re-sorting," balancing staying true to luxury values while navigating an increasingly bifurcated audience landscape.

The Fading Of Aspirational Luxury

Luxury demand is becoming concentrated with the ultra-wealthy, as aspirational consumers feeling price fatigue increasingly choose lower-cost alternatives to access luxury.

Luxury brands' product approach, messaging, audience strategy, and environments for experiences will be shaped by the shifting demand.

~35%

of aspirational luxury customers are pulling back on or delaying luxury spend[1]

Luxury Value Scrutiny Intensifies

As luxury's value faces greater scrutiny, the industry has shifted into an era of earned desirability, with consumers seeking justification for the price.

Brands will lean into articulating product value more clearly, from quality to craftsmanship, across POE to demonstrate reasons-to-believe.

52%

of HNWIs say higher product quality/craftsmanship would encourage them to buy more from a luxury brand in 2026[1]

More Humanity, Powered By AI

Brands are increasingly using AI to manage backend tasks, freeing up time to deepen human connection and build trust - the core of luxury.

AI will allow luxury to dedicate more focus on human-driven hospitality, in-person and via digital innovation, to retain its core audience.

71%

of luxury executives agree AI's adoption "cannot be delayed" in 2026[2]

Chasing A Feeling

Luxury is defined by the feeling it creates, not just the product. Consumers have come to expect white-glove service, seeking brands that make them feel understood.

Brands will reinforce this feeling across the customer experience through personalization, direct advertising, and emotional storytelling.

"My sales associate will pretty much text me on a weekly basis with… what she thinks I'll like. For that moment, you feel like[3] *the VIP.*"

Embracing Resale

Resale is accelerating, growing 3x faster than firsthand fashion and luxury, as consumers become more price sensitive.

Luxury will tap into resale to attract aspirational buyers and build long-term loyalty. Regaining control from third-parties will help brands unlock insights to inform audience / product strategies.

66%

luxury resale site users say it enabled them to discover or purchase a brand for the first time (+7pp vs. 2022)[4]

Source: 1. Business of Fashion; 2. Digital Luxury Group; 3. NBCU Birds Eye View Community (Mar-Apr '25); 4. WWD

2026 **PHARMA** Predictions

These are **5 key topics** as the pharma industry navigates evolving consumer behavior & perceptions as well as regulatory pressures impacting how brands communicate and build trust.

Paging Doctor AI

Consumers are turning to AI for health information due to speed and personalization, while these tools carry risks of misinformation and remain under regulatory scrutiny.

Brands that deliver credible, easy-to-find resources will better connect and rise to the top as AI continues to shape their choices.

35%

of U.S. adults use AI tools to gain insight into their health & wellness, though 30% don't trust the results[1]

Social Is The New Second Opinion

The patient-care network is turning to social for both health research and connection (e.g., KOLs, like-minded users). As social fosters community, there is risk of misinformation.

Pharma can leverage their expertise and vast library of knowledge to build trust as it becomes harder for people to distinguish truth.

55%

of adults use social media to find health information and advice at least occasionally (and 57% among women)[2]

Going Beyond Medication

Brands are expanding their scope to meet consumer needs (e.g., DTC, telehealth), while accommodating drug pricing pressures from the administration.

Brands will shift media investments and promote new programs / capabilities beyond traditional products as interest & innovation rise.

72%

of U.S. adults 25+ said they'd be at least somewhat likely to buy a medication directly from a pharma company[3]

The Expansion of GLP-1s

GLP-1s are growing, with established players expanding medications / indications, + telehealth brands jumping in.

Societal conversation will continue to rise, traces of taboo will subside, its influence will further infiltrate day-to-day industries, from retail to food.

1 in 5

U.S. adults have used GLP-1s, with usage rates increasing as costs continue to go down[4]

Oncology Magnified

Oncology growth is no longer driven only by cures but by survivors. As survival rates rise, cancer is managed as a long-term condition rather than a terminal disease.

Oncology media spend continues its strong growth trajectory as brands look to drive awareness and education for care.

70%

The five-year survival rate for all cancers hit 70% for the first time, with improved survival outcomes for more fatal diagnoses[5]

Source: 1. eMarketer; 2. KFF; 3. Model N; 4. US News and World Report; 5. American Cancer Society

2026 **RESTAURANT** Predictions

4 key topics are top of mind for restaurants this year as they try to maintain profit margins and keep consumers interested as preferences shift.

Restaurant as Experience Curators

Restaurants are increasingly serving as experience curators, not just operators. Brands across categories (retail, entertainment, CPG, etc.) are seeking out restaurant partnerships to drive cultural relevance and foot traffic.

Restaurants can align these strategic partnerships with high-attention media strategies to amplify their voices and stay top of mind with tapped-in consumers.

100%+

Coach reported seeing double to triple digit increases retail store sales in locations that have a coffee shop.[1]

Immigration Impact on Labor & Traffic

Restaurants are highly reliant on immigrant employees and are struggling with employee recruitment and retention given new policies. At the same time, immigrant communities are reducing restaurant visits due to fear. This is not only a tactical business issue but also a brand stance challenge.

Restaurants must balance workforce support with community sensitivity to instill trust during a delicate time.

75%

of U.S. Hispanic consumers now report going to restaurants less frequently.[2]

Menu Manifestations

The need to respond to Gen Z & social trends quickly will result in innovations focused on sauces, flavors, drinks, and toppings; items that can be quickly introduced without revamping full menus and keeping costs low. This will continue to manifest via wellness trends, global flavors, and pop culture-inspired innovation.

Restaurants can align launches with moments that help highlight the freshness, cultural relevance, and scale of these innovations.

39%

of consumers are hopeful and more optimistic that menus will offer more newness this year.[3]

Portion Sizing Gets Smaller

Restaurants are making portion sizes smaller due to increased conversations around moderation and lower appetites due to GLP-1s usage. This is allowing restaurants to protect margins by maintaining price points while reducing costs.

Restaurant brands can tell the story of intentional eating, moderation, and quality in trusted, premium environments and align with narratives where wellness already lives.

35%

of restaurant consumers reported ordering smaller portion sizes in late 2025 for health-related reasons.[4]

Source: 1. CNBC 2. WSJ 3. Restaurant Business 4. GlobeNewswire

2026 **RETAIL** Predictions

After the era of omnichannel evolution, retail is entering a new phase of rapid change shaped by **5 key topics.** Retailers must now balance human connection with technology, cost with quality, and consumer control with hands-off convenience.

Return of Malls & In-Person Shopping

Malls & in-person retail are rebounding. With brands integrating cafes, lounges, and experiential elements; physical retail continues to shift from transactional to experiential & lifestyle-driven.

With this transition, retailers must focus on high-attention media strategies to drive deeper engagement in and out of the store.

+1.3%

YoY increase in 2025 indoor mall visits, with continued growth expected in 2026.[1]

Immigration Impact on Labor & Traffic

Retailers reliant on immigrant employees are facing staffing constraints while immigrant communities are reducing store visits due to fear. This is not only a tactical business issue but also a brand stance challenge.

Retailers must balance workforce support with community sensitivity to instill trust during a delicate time.

-14.7%

YoY decrease in self-reported visits to mass retailers by Hispanic shoppers in mid 2025, while online shopping increased.[2]

The Return of High End and Low End

The K-shaped economy is driving retailers to offer both premium and value solutions. We'll see a renewed focus on outlets aimed at recapturing value shoppers before they trade down, while premium brands continue catering to higher-income consumers.

Retailers must tailor media strategies to distinct value segments to effectively reach and resonate with shoppers across the budget spectrum.

+6.6%

increase in off-price store visits and +1.8% increase in luxury apparel visits during 2025 holiday while mid-tier dept. store foot traffic decreased.[3]

Instant Gratification & Control

As same-day delivery expands to the apparel subcategory and new commerce marketplaces and aggregator apps emerge (e.g. Shop App), centralized, frictionless shopping will become the norm.

As shoppers continue to expect instant gratification, advertisers need to focus messaging around fast, curated, and convenient experiences.

80%

of consumers expect retailers to offer same-day delivery; 70% consider shipping speed critical to a positive shopping experience.[4]

Agentic: Evolution of Convenience

Agentic commerce will emerge as the next evolution of convenience-driven shopping; designed to anticipate needs, create highly personalized experiences, and automate the shopping journey.

Retailers must invest in brand preference and familiarity strategies to stay top-of-mind when AI agents make shopping decisions.

50%+

over 50% of consumers plan to use AI assistants to help make purchases in 2026.[5]

Source: 1. The Anchor - Mall Index 2. Reuters 3. The Anchor – Holiday Season 4. CapitalOne Shopping Research 5. BCG

2026 **STUDIOS** Predictions

Spanning the film lifecycle from theatrical release to awards season, these are **5 key topics** shaping the Studios category amid evolving global consumption trends, preferences, & tastes for entertainment.

Theatrical Gets Experimental

Traditional fixed release windows are being upended by film or audience-specific strategies (ex. weekend-only, sing-alongs) to capitalize on engaged fandoms, urgency, & data-driven optimization.

Specialized releases can help drive scarcity, demand, & experience differentiation especially amongst target genre or demo audiences.

64%

of Gen Alpha go to theaters to make seeing a movie feel like a special event.[1]

Loyalty Comes at a (Lower) Price

High ticket prices necessitates more economical programs (ex. loyalty tiers, Discount Days, bundles, subscriptions) that give viewers more bang for their buck & lower high-cost barriers to entry.

Building stronger lifetime value with customers through DTC programs drives loyalty & repeat business long-term.

Top factor that consumers say would increase movie-going:

#1 Less expensive tickets or finding deals on movie tickets[2,3]

Nostalgia & Known IP Drive Buzz

The upcoming theatrical slate is full of returning famous faces & franchises primed to drive social chatter & draw fans to theaters.

Leverage audiences' pre-existing IP knowledge to have more creative freedom with unique promotions that capture attention & tie into today's most relevant, cultural moments.

$6.1B

estimated potential revenue for 2026 franchise films based on predecessor film earnings.

+13% vs. 2025[2]

The Balance of Arthouse/Original IP

The recent critical & commercial successes of arthouse, independent, & original IP films demonstrate their resilience among franchise & established IP.

This resonance of original & niche stories alongside tentpole films will shape future slate development & what/whose stories get to be told on the screen.

72%

of Americans want to see more original films with fresh genre takes & creative risks.[2]

Hollywood Goes Global

The global box office & award shows have been skewing towards non-U.S. films & talent, demonstrating an audience & industry shift to a more global-centric entertainment culture.

This enriches opportunities to engage a more diverse range of consumers & expose viewers to different cultures & stories they may not otherwise experience.

18

Academy Award & 21 Golden Globe nominations across 5 international films from Neon.[4]

Source: 1. NRG "Gen Alpha Saves the Box Office?" August 2025. 2. NRG "Future of Film" 2025, Fandango Moviegoing Insights 2025. 4. Deadline (1)

2026 **TECH** Predictions

These are **4 key topics** as the category continues accelerating innovation, especially around AI, to drive market share, adoption, & positive affinity in today's competitive landscape.

Prioritizing AI Search Over AI Hype

AI-generated search use & Generative Engine Optimization (GEO) strategy continues to grow at the expense of traditional search & SEO.

Tech brands will amplify their digital brand presence through mass reach & mass buzz tactics to maximize their appearance within AI search results.

75%

of AI users depend on AI-driven recommendations daily or weekly.[1]

Gen AI Marketing goes Mass Appeal

In 2025, gen AI brands branched into upper funnel marketing, such as OOH & premium video brand campaigns.

Given that trajectory & the competitive AI race, gen AI will graduate to splashier marketing (ex. experiential & sponsorships) to capture wider mindshare & associate with consumer passions.

3x

growth in linear marketing spend by AI brands in Q4'25 vs. STLY.[2]

The More Micro, the More Impact

For connection, audiences are increasing gravitating toward niche, community-driven spaces over mass-market, generic content.

Tech will leverage their data & AI to better understand, reach, & engage multiple audience segments with specific messaging that authentically speaks to each segment's interests & needs.

88%

of American participate in niche communities with half preferring brands that cater to specific passion points.[3]

Humanizing Over Optimizing

As the world becomes increasingly efficient from AI & tech, there's a corresponding, growing desire for greater human connection, trust, & transparency.

Within campaigns, tech brands will balance utility messaging with more human-centric storytelling to grow trust & positive perception.

70%+

of consumers still value human assistance within gen AI-driven customer journeys.[4]

Source: 1. Kantar Marketing Trends 2026 2. MediaRadar as of 1/15/26 3. Axios 2025 4. Capgemini 2026

2026 **TELCO** Predictions

Beyond the potential impacts from macroeconomic & infrastructure dynamics, these are **4 key topics** to be aware of as Telco brands look to enhance operational efficiencies, competitive differentiation, & customer lifetime value.

AI Powers Self-Healing/ Optimizing Networks

By integrating agentic AI into its advanced AI adoption, the category will develop autonomous, AI-driven networks that predict, optimize, & fix issues in-real time.

Significantly reducing service disruptions will nurture customer goodwill while also unlocking employee bandwidth to prioritize other initiatives requiring human involvement.

+24%

agentic AI telco & network management market size CAGR 2026-2030 *projected to reach $13.3B in 2030.*

Industry Consolidation Accelerates & Solidifies

As M&A & strategic partnerships take shape, telcos will achieve greater verticalization to diversify portfolio offerings & drive scale.

Post-consolidation, individual telcos' strengths/standings will shift, requiring each to re-establish & position their enhanced portfolios in the marketplace & to target customers.

$45.5B

spent on major fiber M&A deals from 2H'23-1H'25 to capitalize on rapid fiber growth & projected demand.[2]

Contract Innovation & Pricing Experimentation

With consumers now accustomed to more flexible subscription models (vs. long-term contracts), prepaid, contract-free, & unbundled services are gaining momentum.

For customer value-creation, acquisition, & retention, telcos will develop innovative offers, ex. transparent/simplified pricing, contract-free options, or personalized packages.

30%

of consumers cite pricing/value as the #1 reason to switch telco providers.[3]

Telcos Evolve into Lifestyle Brands

Telcos have been diversifying offerings with more lifestyle or non-endemic partnerships & perks (ex. credit cards, priority access event tickets, etc.) to differentiate.

More expansive & creative partnerships will generate greater customer lifetime value, reinforce positive brand association beyond wireless, & build greater loyalty.

1/3

of consumers in developed markets prioritize perks over peak speeds from telco providers.[4]

Source: 1. Mordor Intelligence. 2. S&P Global. 3. Forbes. 4. Deloitte 2026 Technology, Media & Telecommunications Predictions

2026 **TRAVEL** Predictions

From intent to inspiration to AI, these are **5 key to**pics are shaping travel in 2026 as from transactional tourism to transformative journeys driven by the desire for deeper experiences, personal growth and emotional resonance.

The Off-Peak Creep

Traveler behavior is shifting from two-week summer holiday to shorter, frequent "micro-cations" during the shoulder months.

Brands that shift toward "always-on" strategies can capture demand beyond the constraints of traditional seasonal peaks.

76%

of travel advisors report increased demand for shoulder seasons in 2026.[1]

“Why-Cation” Motivation

Emotion and purpose are taking precedence over location-based travel as travelers take hyper specific “mission trips” for personal growth, connection, or wellness.

Brands that align messaging with travelers’ emotional intent rather than just location to win the traveler’s decision.

49%

of U.S. travelers prioritize emotional and functional drivers over the destination itself[2]

From Destinations to Moments

Major cultural, music, and sporting moments *in* a destination have become a primary anchor in travel vs. the destination itself - continuing to shift beyond location.

Leading with the "signature moment" gives a reason to visit now – increasing opportunity to diversify demand for the location.

40%

of live music attendees traveled at least 500 miles for a music event in 2025.[3]

IP-Driven Itineraries

“Fandom-first” travel has become next iteration of “set-jetting” as entire itineraries based on the favorite streaming series, video games, and social media subcultures are booked.

Brands using entertainment media to drive inspiration and discovery can grow mental availability among new audiences.

81%

of Gen Z and Millennial travelers now plan getaways based on TV shows and movies.[4]

The Rise of Agentic AI Planning

Autonomous agents are becoming the primary gatekeepers of travel decisions as Gen-AI evolves into Agentic AI.

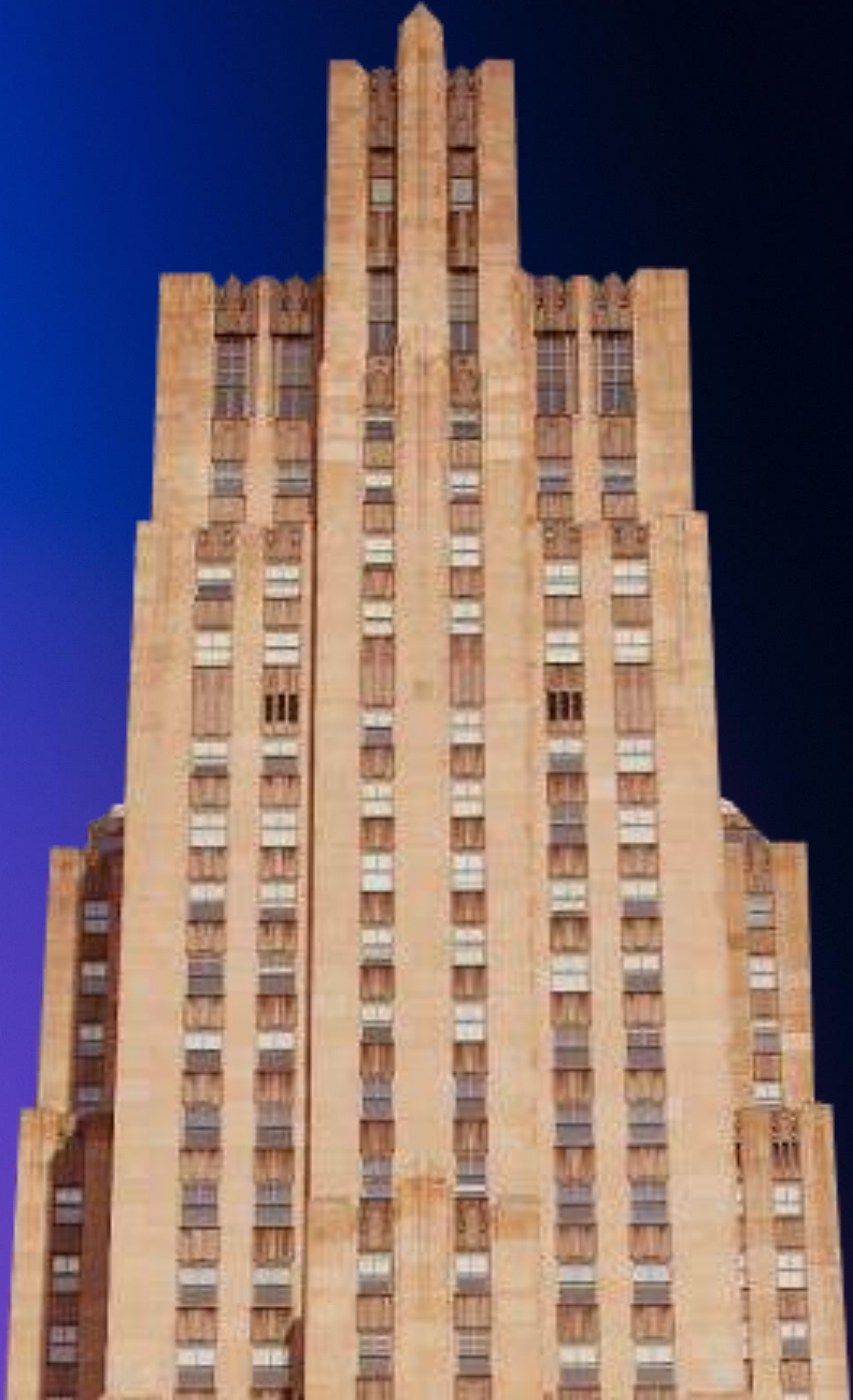
Near-term adoption and optimizing machine-readability will enable brands to remain the preferred choice in the new world order of agentic AI.

52%

of U.S. travelers would switch from their usual hotel/OTA brand if the AI suggestion was meaningfully better.[5]

Source: 1. CNBC; 2. Mintel – Vacation Motivations 2025; 3. Live Nation. 4. Expedia Unpack 2026; 5. Skift Global Travel Insights 2026

THANK **YOU!**



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