

CONTAGIOUS

radar

REPORT





Welcome to the Contagious Radar 2026 – our annual round-up of the key trends set to shape culture and marketing in the year ahead.

We're usually a pretty upbeat bunch, but this year a persistent note of tension – psychologist Vincent Deary calls it 'the ambient hum of menace' – has changed the mood.

You can compare this vibe-shift to a Cold War term: 'the delicate balance of terror'. It was a polite spin on the idea of mutually assured destruction. Cheerful stuff. But also newly resonant: 2026 may well mark the arrival of its corporate cousin, 'the delicate balance of automation'.

Instead of nuclear warheads, a new technology is in play. If one company replaces a swathe of employees with AI, it saves a fortune. But if everyone else does it too, that diminishing workforce translates into diminishing consumer spending. Efficiency, meet existential awkwardness.

Welcome to the Cold War of AI: a race everyone feels compelled to run, even though it feels curiously self-defeating. No wonder we're all on edge.

That unease seeps through the six trends explored in this year's Radar, spanning our enduring appetite for meaning, comfort, connection and protection. Running through them all is a clear, human through-line: the longing for a little more control, a little more agency in the face of relentless uncertainty.

Oh – you're waiting for the good news.

Well this is the best I've got right now: the size of the threat is directly proportional to the size of the opportunity.

Like it or not, 2026 is the year we're all obliged to put that theory to the test.

[Katrina Stirton Dodd](#) / Trends Editor / [Contagious](#)

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The Attention Sink

When content proliferates towards the infinite, attention, memory and meaning collapse



Expect to see a lot more of Khaby Lama (seen here in a State Farm ad). TikTok's most-followed creator will soon have a 'digital twin'

In 1968, behavioural researcher John B. Calhoun built a rodent utopia. In 'Universe 25', mice had space, unlimited food, and no predators. The population boomed. But as population density increased, behaviour deteriorated. The mice became aggressive, mothers abandoned or attacked their young, and the 'social skills' required to mate were lost. Despite a habitat capable of housing nearly double its population, the colony collapsed. Calhoun called this breakdown a '[behavioural sink](#)'.

In 2026, we're living in the Universe 25 of content – and facing an attention sink created by cognitive, rather than physical, overcrowding. As the computer scientist Herbert Simon observed, 'A wealth of information creates a poverty of attention.' The supply of content has risen to near-infinite levels while demand – our ability to consume it – has remained static.

And supply is only increasing. It would take 16 years of continuous viewing to watch all the content on Netflix. An estimated 30,000 hours of content is uploaded to YouTube every hour. On TikTok, 16,000 videos are posted a minute. AI is compounding this deluge. In 2025, Spotify removed [75 million](#) AI-generated tracks from its platform. Author Coral Hart used AI to increase her output from 10 books a year to [200](#). TikToker Khaby Lama sold his brand and likeness for nearly a billion dollars, paving the way for a [digital twin](#) to produce content 24/7.

Drowning, not waving /

Rather than being spoiled for choice, we're spoiled by choice. On streaming platforms, a glut of options becomes 'there's nothing to watch'. So we retreat to efficient entertainment: doomscrolling short-form loops. On social media, already shortened formats are clipped into bite-sized chunks, in the hope of driving viewers back to the source – but often they become the primary experience.

In China, the total audience for [micro-dramas](#) hit [830 million](#) in 2025, with smash hit show *From Rags to Rank One* notching up over 2 billion views across its 105 episodes (none of which are longer than three minutes). Mainstream broadcasters are investing in the format, with Fox Entertainment signing a [major deal](#) with

micro-drama powerhouse Dhar Mann Studios.

The watch-out is that much of this stuff is shallow, not immersive. Surface-level engagement might be enough for creators to monetise, but for brands, who need to be in the business of getting attention and building memory structures, it's a serious problem.

Even MrBeast, who pays an army of creators to slice up his videos for virality, [admits](#) the strategy is flawed: 'People with millions of followers will do a meet and greet and can't even get five to show. There's a big difference between someone consuming a five-second clip of you, versus watching a 20-minute video and... getting to know you.' In this analogy, brands only profit from those who attend the meet and greet.

'There's a big difference between someone consuming a five-second clip of you, versus watching a 20-minute video and... getting to know you'

MrBeast





Right: Bilt's vertical sitcom, Roomies.
Below: Financial Times For the Why



Survival of the fittest /

Competition for focused attention is fierce. And like any Darwinian battle, only the fittest survive.

Taking inspiration from micro-dramas, US-based rewards company Bilt created [Roomies](#), a virtually unbranded vertical sitcom, averaging 1.2 million weekly viewers across Instagram and TikTok. P&G, meanwhile, has partnered with Dentsu Entertainment to launch [The Golden Pear Affair](#), a 'microsoap' promoting its Native deodorant brand. Seven of its 55 rollicking episodes are free, others can be 'unlocked' by watching promotional content... or by paying \$9.99 for the full adventure.

As sports fans increasingly turn to social content, not all brands are resisting viewer habits. From 2010 to 2024, linear TV sport view-

ing [decreased by 34%](#) among global sports fans aged 16-34. In response, German football league the Bundesliga [integrated](#) watch-along formats with creators like Mark Goldbridge into official broadcasts on the creators' channels. Fragmented attention was folded back into the main event.

To differentiate itself in the non-stop news cycle, the *Financial Times* has taken a strategic bet on meaning. Its [For the Why](#) campaign promotes the paper's deep insight and analysis. 'People are overwhelmed by the volume of the media landscape,' Matt Walters, chief strategy officer at its agency, New Commercial Arts, London, told Contagious. 'They want to substitute some of that quantity for quality.'

So what?

When we surveyed leaders in the global ad industry (see page 13) about how to tackle the challenge of content abundance, the advice was clear. When it comes to social, 89% said the smart play for brands was to do 'fewer things of higher quality'. Content needs to stand out from the crowd, not increase the crowd's size. While it may be tempting to adopt a 'flood the zone' approach, the last thing a drowning man wants is to be handed a glass of water.

The Friends
McDonald's meal was
created by Omnicom
Advertising, TBWA\|
Worldwide and
Adam&eve\|TBWA



The Nostalgia Industrial Complex

The past is no longer something people revisit occasionally, it's something they live inside

Author [Michael Chabon](#) once described nostalgia at its most honest as 'always momentary, always fragile' – like placing 'a phone call directly into the past and hearing an answering voice'. It works because something has gone.

That's not what's happening now. In 2026, the past is searchable, streamable and generative.

Reboots and anniversary revivals are routine. Generative AI systems are trained on vast digital back catalogues, ready to reproduce vintage aesthetics on demand. In his documentary series *Shifty*, the filmmaker Adam Curtis calls this a 'feedback loop of nostalgia, repeating

back sounds, dreams, and images of the past'. AI, he argues, is 'a strange haunting; a vast collage of our dreams and fantasies that we've put online'.

In a culture that keeps the past permanently available, nostalgia can easily feel like a self-indulgent trope – but it's also a rational response to an environment that rarely offers actual closure. When nothing ever seems to end, the finite becomes ever more appealing.

Vinyl sales in the US grew for the 19th consecutive year in 2025, reaching [47.9 million](#) units. [Dumb phones](#) and [analogue hobbies](#) are boundary-setting moves in a system that no longer seems to build those in.

Back to better days /

Nostalgia today runs deeper than just aesthetic recycling. It reflects a frame of mind.

Research from [YouGov](#) finds most Britons believe life was better in the 1990s and 2000s. Against a backdrop of education disruption, job precarity, cost of living pressure and crisis fatigue, nostalgia offers a route to something increasingly hard to attain: emotional regulation.

Studies link nostalgia to [improved mood](#), increased [self-esteem](#) and stronger [social connection](#). That helps explain why adults are buying back the artefacts of childhood. Adults now account for 28% of global toy sales, growing at 10% annually, according to [Circana](#). [Build-A-Bear's](#) adult share has risen from 20% to 40% of sales. [Jellycat](#) plush toys sit on office desks. Labubus have grown into a billion-dollar business largely fuelled by adult demand.

Jellycat plushies:
from kids toy to
adult obsession



Gen Z and millennials are even channelling the comforts of childhood by creating shrines to Y2K in their homes. In a trend that [Architectural Digest](#) calls 'nestalgia', people are taking to social media to document entire rooms filled with 90s and 2000s relics. That's right: chunky CRT TVs, VHS shelves and heartthrob Chad Michael Murray pinned back up like it's 2004.

Sometimes these are faithful reconstructions. Some represent an imagined childhood. The past still appeals, even if you didn't experience it for yourself. Data from [GWI](#) shows 37% of Gen Z feel nostalgic for the 1990s, despite being born in the late 90s or 2000s.



Hot fuzz: Build-A-Bear's After Dark range

From BALM to OIL to PARADISE

Experience The New Orange Gelée SPF 30 by Vacation®

In a world where sunscreen is a mere formality, Orange Gelée emerges as a decadent, sensorial journey for the skin. From the moment you uncap and pierce its aluminum tube, a decadent orange-tinted balm presents itself. And like an artisanal soufflé, it melts effortlessly into your skin, leaving behind only the silky remnants of moisturized perfection. With that said, it stands to reason that Orange Gelée is more than merely sunscreen. It's the epitome of civilized living — a testament to the luxuries found only along the French Riviera.

Vacation®

MAR 24

Profiting from the past /

For brands trying to reconnect with disillusioned audiences, looking back can provide an effective escape route from the volatility of the present.

When Gen Z watches *Friends*, they're often wistfully imagining an offline world they don't actually remember. So when McDonald's launched a limited-edition *Friends* [Happy Meal](#)-style box in the UK in February, complete with mini figurines of Rachel, Monica, et al, it did more than celebrate a still-popular sitcom, it offered younger fans a small collectible slice of the 90s.

[Gap's 2025 summer campaign](#) similarly celebrated the giddy highs of Y2K through the medium of low-rise jeans. Their ad saw girlband Katseye cover the 2003 Kelis track 'Milkshake', bringing [20 million views](#) to the yard in three days

flat – more than the retailer's previous four commercials combined. For heritage names like Gap and McDonald's, these campaigns also remind audiences of a time when these brands were in their iconic heyday.

Meanwhile, sunscreen brand Vacation, founded in 2021, has built its entire identity around a stylised 1980s leisure fantasy. As *Newsweek* [observed](#), Vacation 'created a time machine and disguised it as a bottle of sunscreen'. That retro aesthetic helps it stand out in a category that's dominated by more clinical competitors – but what Vacation understands better than most is this: brands hoping to profit from nostalgia need to go further than borrowing the look of a bygone era. Recreating the past is pretty basic: the real opportunity is recreating the feeling.

So what?

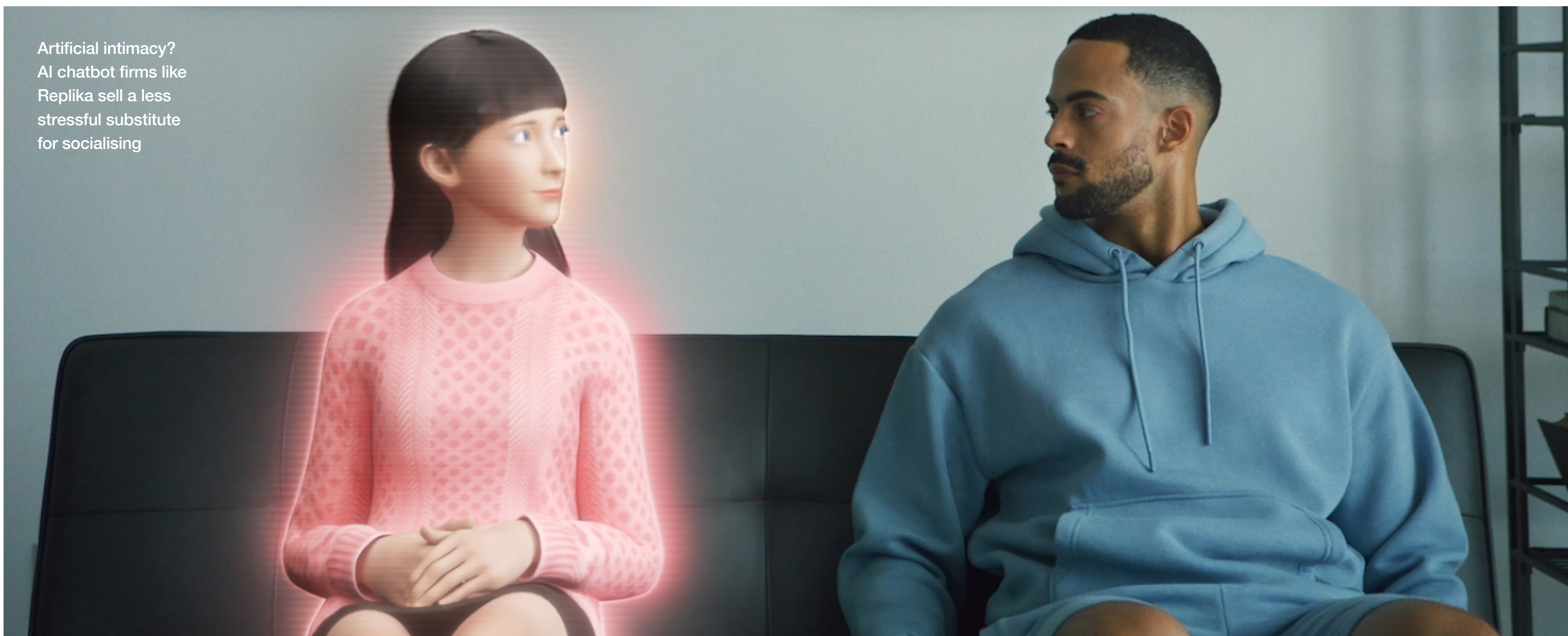
Nostalgia's commercial power is well established. [Research](#) by Jannine Lasaleta found that nostalgia increases feelings of connection and reduces price sensitivity.

But the strategic question for any brand reaching into the archive is simple: are you building from it, or merely displaying it? A large share of the audience engaging with archive IP today weren't there the first time. So this isn't really about recollection, it's about tapping into the emotional atmosphere of another era. The archive is useful. It is not the idea.

The Loneliness Disconnect

Humans are meant to be social creatures, but people aren't people-ing – at least not with each other. Big Tech made us lonely. Now it's selling us the cure

Artificial intimacy?
AI chatbot firms like Replika sell a less stressful substitute for socialising



Vogue is debating whether [having a boyfriend](#) is 'embarrassing'. The proportion of young adults having no sex is rising fast enough to worry demographers. In the UK, men over 65 are more [likely to](#) marry than men in their early 20s. Over [60% of adults](#) in Japan prefer 'lonely freedom' to 'troublesome connections'.

That last stat punctures a comforting myth. Loneliness isn't simply being inflicted on us by evil platforms. As journalist Derek Thompson argues, [isolation](#) is increasingly a choice. The real problem, he says, 'is that we've forgotten how to feel lonely in the first place'. A large part of that forgetfulness is down to technology.

Two decades ago, Silicon Valley promised connection at scale. Instead, they've made solitude seem less stressful than socialising. Now a new wave of companies is monetising what the first wave eroded, selling AI-powered intimacy and synthetic companionship as an obliging substitute for the real thing.

Uptake has been swift and enthusiastic. In the US, [28% of adults](#) say they have at least one intimate or romantic relationship with AI. Entire [subreddits](#) are devoted to relationships with bots. But is this what people actually need – or just what it's easy and profitable to serve up in place of companionship and community?

The Operating System of Me /

Before digital, self-centredness was discouraged: ‘The universe does not revolve around you,’ we were scolded. Now the opposite is true: we live in what Contagious editorial director Alex Jenkins [calls](#) the ‘Operating System of Me’.

Algorithms filter out what we don’t like and deliver what we do – quickly, frictionlessly and on demand. Entertainment streams. Groceries appear. Feeds refresh. We have built an infrastructure exquisitely optimised to remove the need for other people – until their absence suddenly seems unbearable.

By that point, the awkwardness of IRL encounters can seem insurmountable – so many are turning to tech to fill the people-shaped gaps in their lives.

In January, [an app](#) that asks ‘Are you dead?’ went viral in China: miss two daily check-ins and

your emergency contacts are alerted. Chatbot maker Character.AI has voluntarily [restricted under-18 access](#) to open-ended chat, a response to concerns over mental health harms to teens. Meanwhile, companion app [EVA AI](#) is setting up screen-based ‘date nights’ in New York venues to ‘normalise’ AI relationships.

The obvious worry is that outsourcing intimacy to machines at scale comes with consequences to match.

OpenAI research scientist Zoe Hitzig [quit her job](#) to warn that ChatGPT has catalogued ‘the most detailed record of private human thought ever assembled’. The big question, she says, is can we trust the tech company not to abuse it?

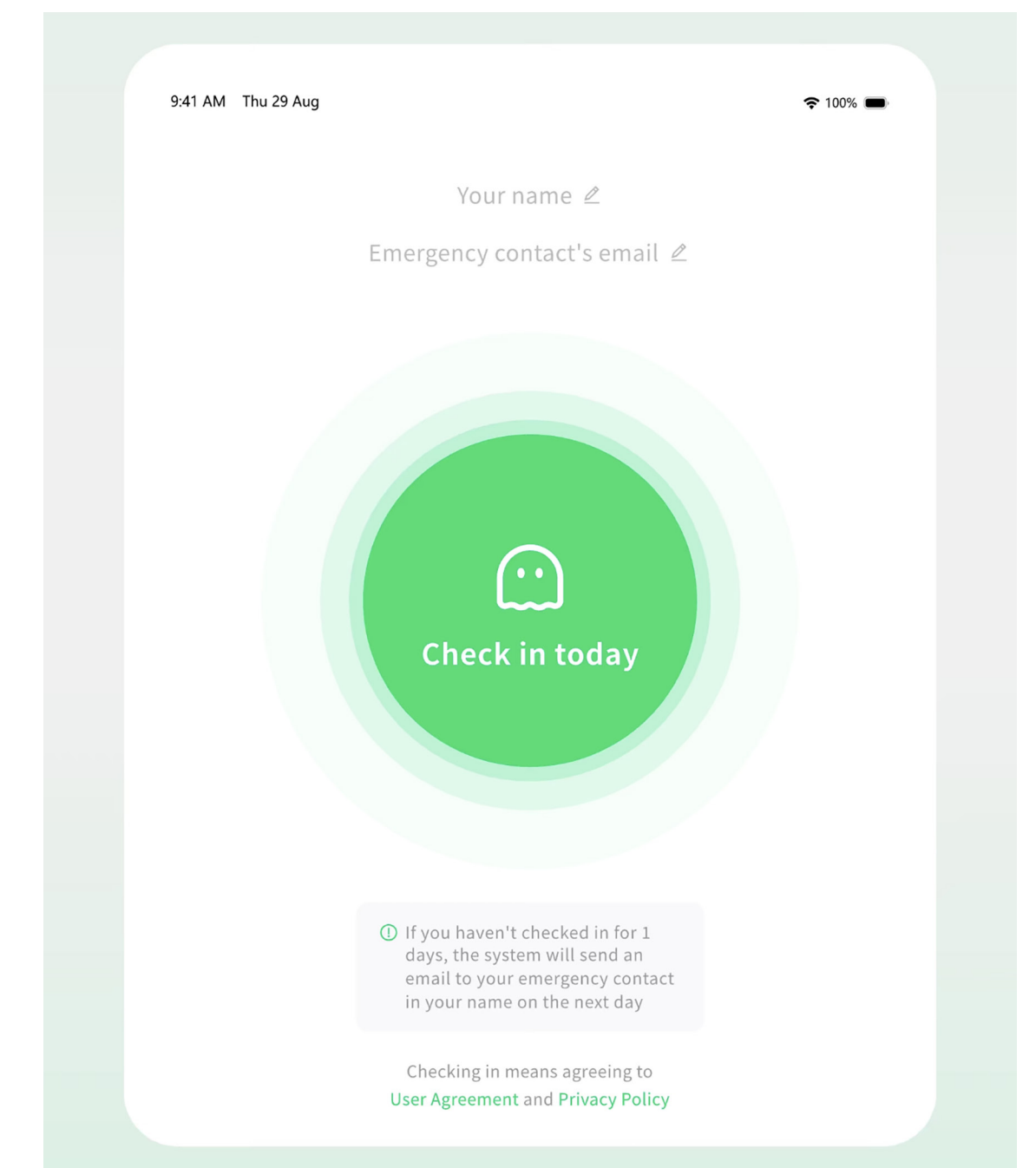
AI researcher and author of [Love Machines](#) James Muldoon [is blunter](#): ‘When Silicon Valley tells us that the solution to social disconnection is to talk more to machines, we should be sceptical.’



This is fine. EVA AI’s romantic date night events are bringing AI relationships into the open

‘When Silicon Valley tells us that the solution to social disconnection is to talk more to machines, we should be sceptical’

James Muldoon, AI researcher





Above: an Uno Social Club event. Right: Heineken's Rooftop Revival campaign, created by LePub Milan and Singapore, and Publicis Groupe Korea. Far right: Palace and Nike's new Manor Place venue



Building for belonging /

No one expects brands to solve loneliness. But if they claim to understand people they can hardly ignore the pervasive social disconnect that defines modern life.

Big changes can start small. Swedish pharmacy chain [Apotek Hjärtat](#) is setting aside a portion of work time for staff to strengthen friendships or make new connections. In the US, Mattel's [Uno Social Club](#) gets people out of the house for games nights. In Seoul, Heineken is [rebranding rooftops](#) as a place to chill with friends and a beer. Palace and Nike have collaborated on [a free London space](#) to skate, play football and hang out.

Facilitating such encounters puts a new spotlight on the role of hosts, argues Andrew Roth,

founder of agency Offline. He [describes](#) them as 'the new influencers' – but what skilled hosts create is not content, it's 'sustainable in-person belonging'.

The gap they address is real and poignant – cultural strategy expert Sarah Johnson calls it '[the social skills apocalypse](#)'. She describes a generation raised without 'rizz' – the charisma learned through real-life conversation. Another trend strategist, Anu Lingala, says the '[Charisma Capital](#)' possessed by great hosts and the socially confident has become 'a uniquely significant attribute in the age of AI'.

With interpersonal intelligence in such short supply – and high esteem – bridging that gap and building those skills is one of the most effective ways for a brand to make an impact in 2026.

So what?

If Big Tech built the infrastructure of isolation, there's a clear opportunity for brands to build an alternative infrastructure of belonging, lowering the barriers to showing up, hanging out and practising being human again.

When people are drifting into relationships with AI, the most disruptive move a brand could make right now is: getting people in a room with each other.

CONTAGIOUS radar SURVEY

Our annual industry healthcheck reveals how the best minds in marketing feel about the state of the sector in 2026

Each year, as part of our Radar report, we poll 100 C-suite marketing and agency leaders to get a read on how they feel about the pressing issues of the day.

This year it feels like those ‘pressing issues’ are testing their resilience more insistently than ever.

Is generative AI making agencies less valuable

in the eyes of clients? What’s the best way for brands to compete amidst the content slopocalypse? What do our industry illuminati really think about creators’ creativity?

Adland tends to run on optimism, but in this climate, hope alone may not quite be enough – to find out how it plans to face its demons this year, read on.

The biggest challenge facing the industry in 2026 is...

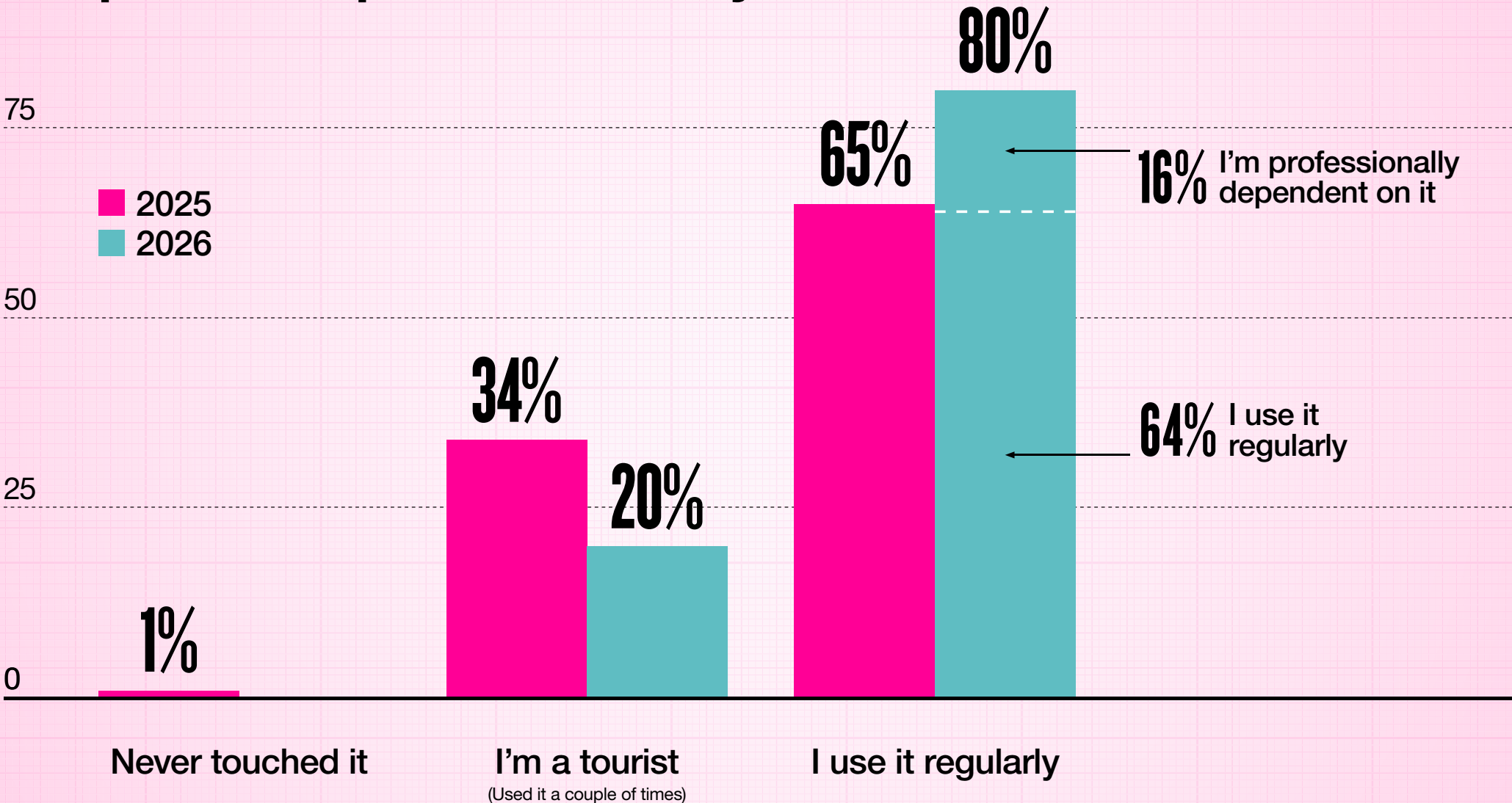
(Ranked in order of priority)

- 1 Geo-political and economic uncertainty
- 2 Clients devaluing creativity
- 3 Technology devaluing (human) creativity
- 4 Having to do more with less
- 5 Getting attention in a competitive content environment

Source / Contagious Radar 2026

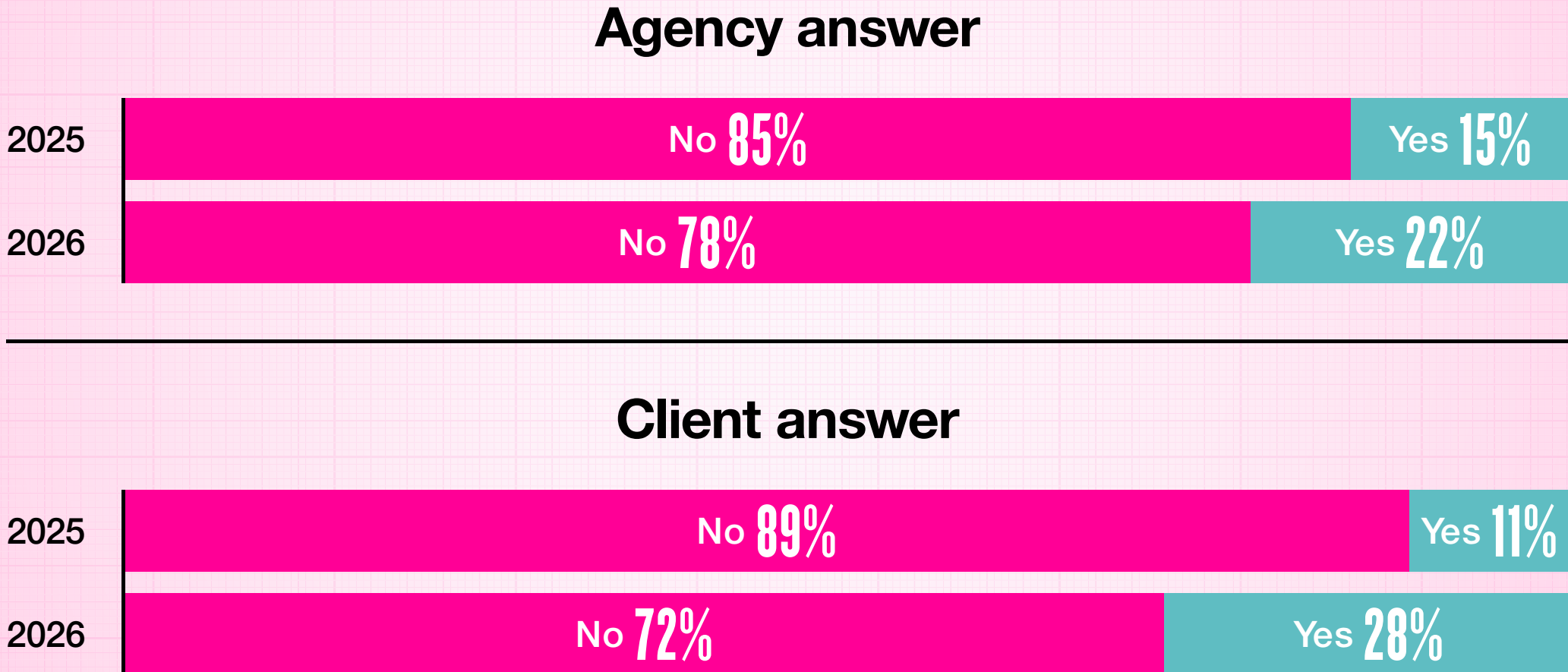
While the majority of respondents regularly use AI, the number of clients who believe the tech is devaluing agencies has more than doubled, rising from 11% in 2025 to 28% this year

AI uptake compared with last year:



Source / Contagious Radar 2026

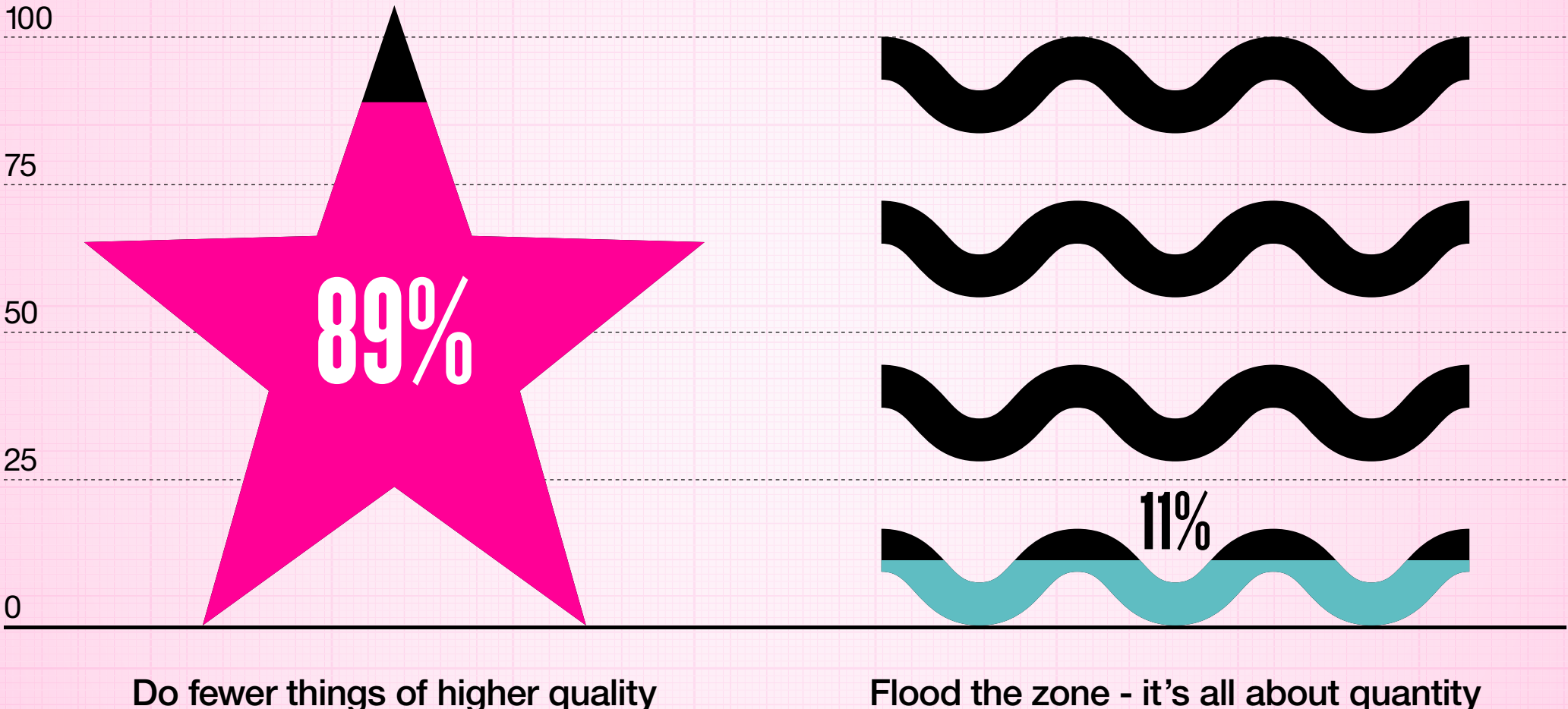
Are agencies less valuable in a generative AI world?



Source / Contagious Radar 2026

On social media, 89% of respondents endorse quality over quantity as the key strategy, but there's distinct ambivalence over the level of investment in creators – and the creative quality of their output

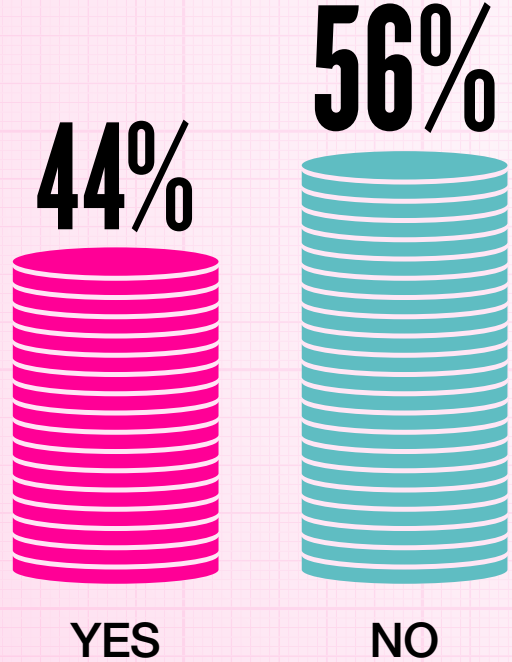
The sheer volume of content on social now means that the smart play for brands is:



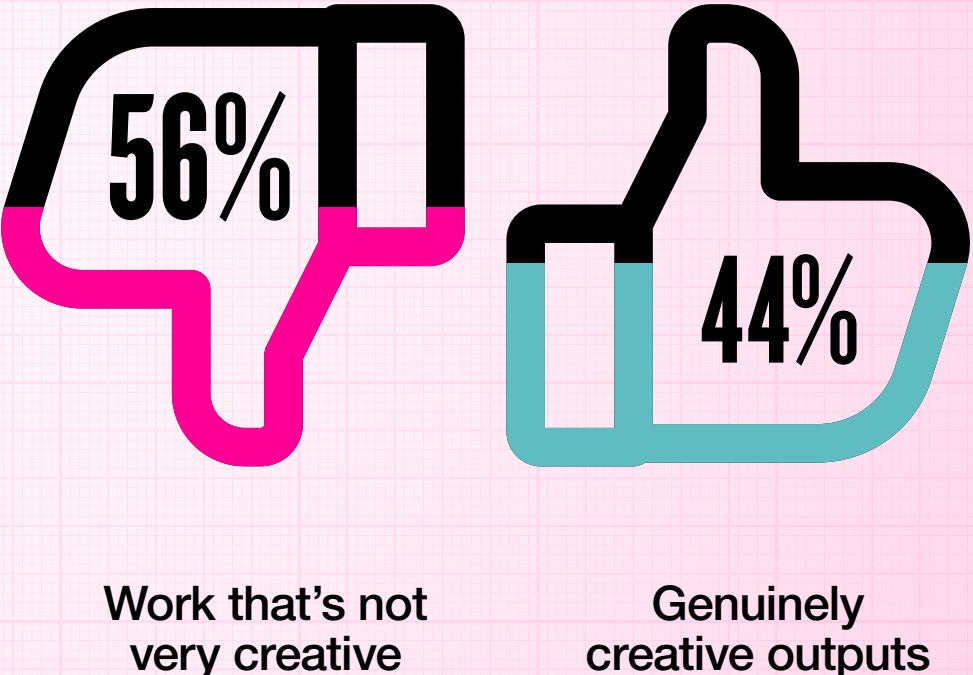
Source / Contagious Radar 2026

The creator conundrum:

Are we investing too much in creators?



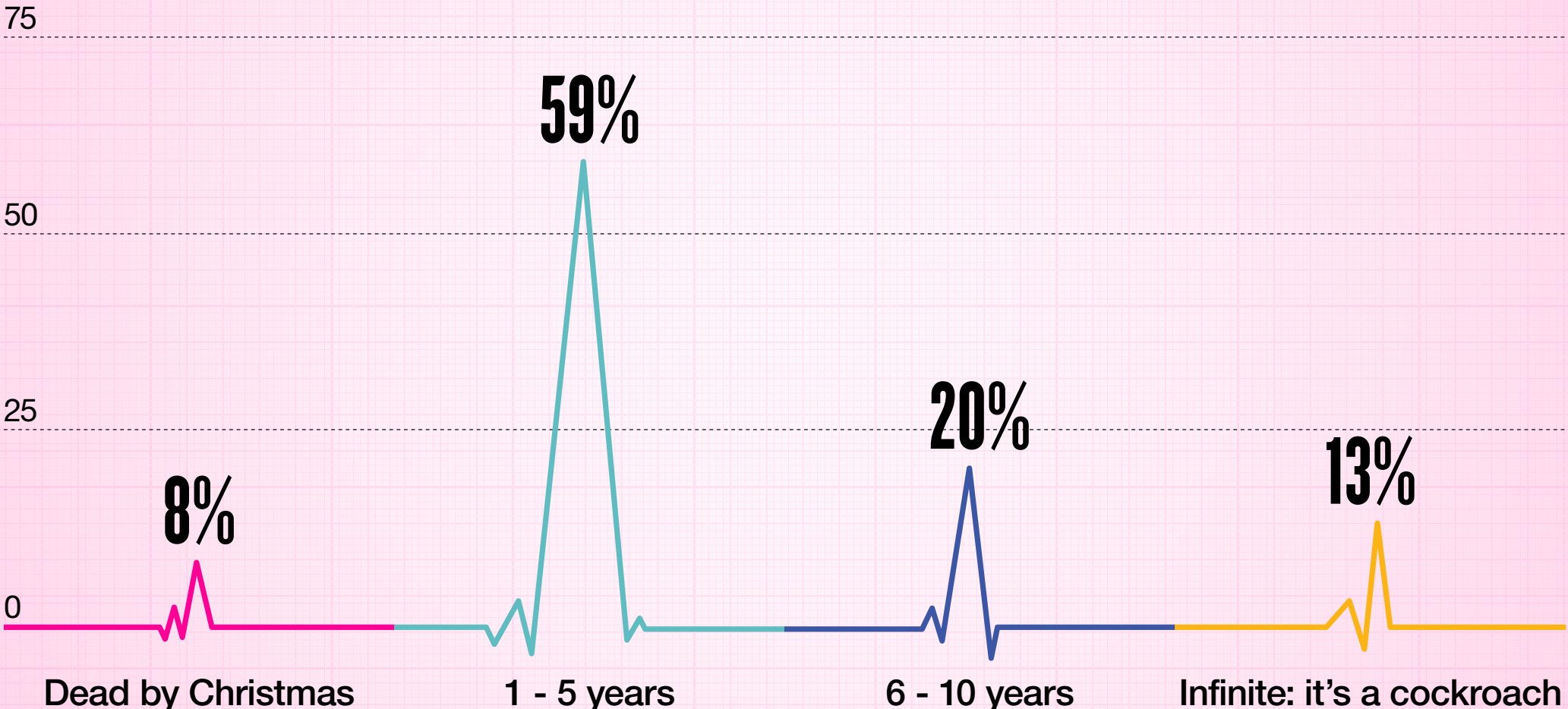
Working with creators leads to...



Source / Contagious Radar 2026

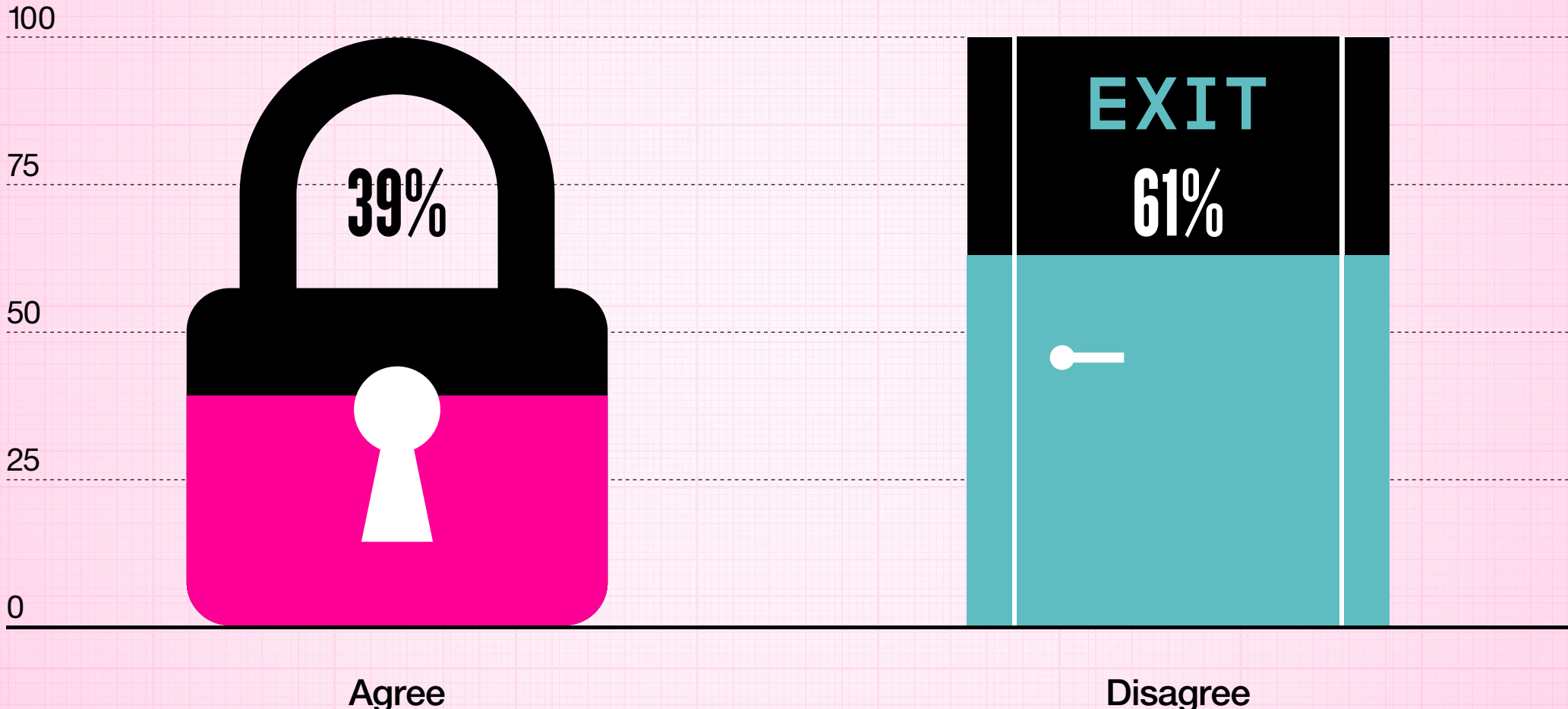
Although a majority think that the current industry model won't last five years, and that people's jobs are less secure, most of our survey cohort still feel reasonably buoyant (see next page)

The life expectancy of the current ad industry model is...



Source / Contagious Radar 2026

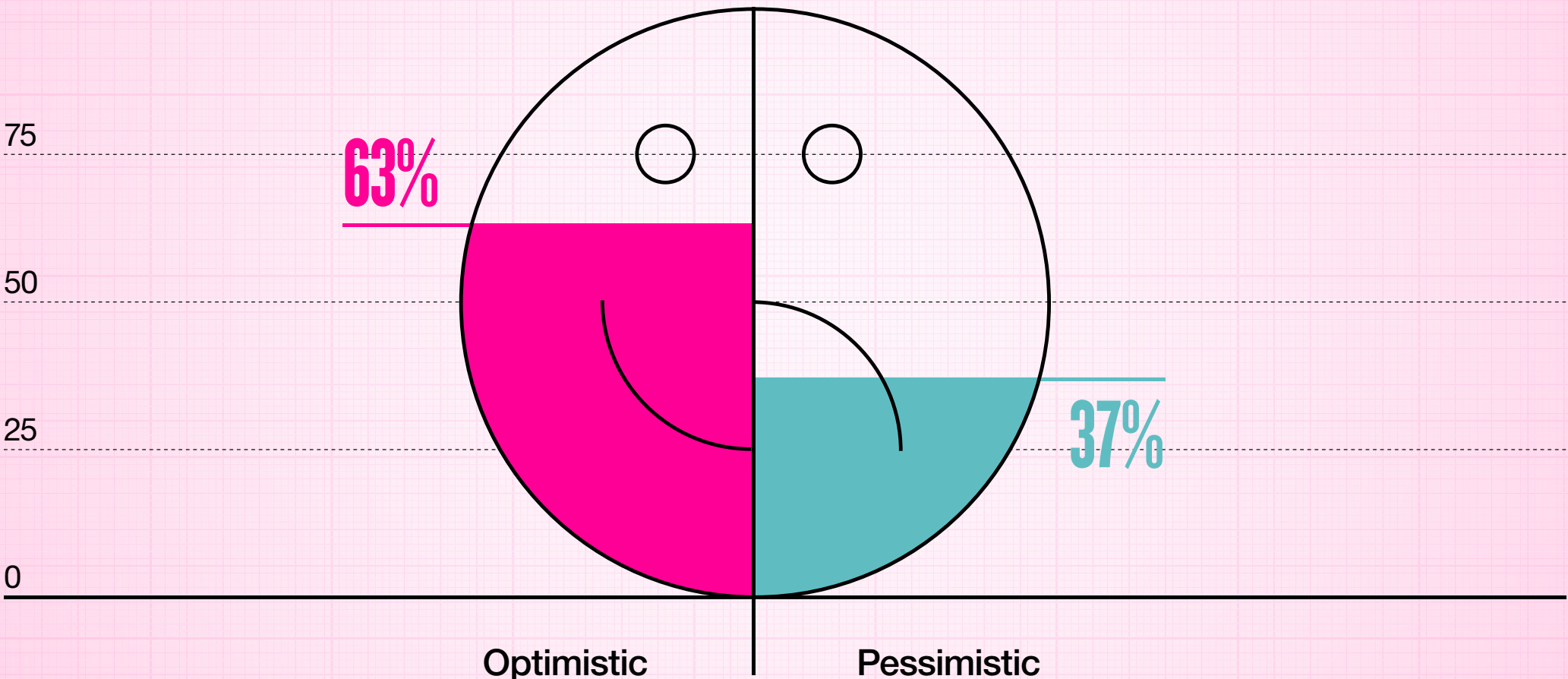
I feel the jobs of the people on my team are as secure as in previous years:



Source / Contagious Radar 2026

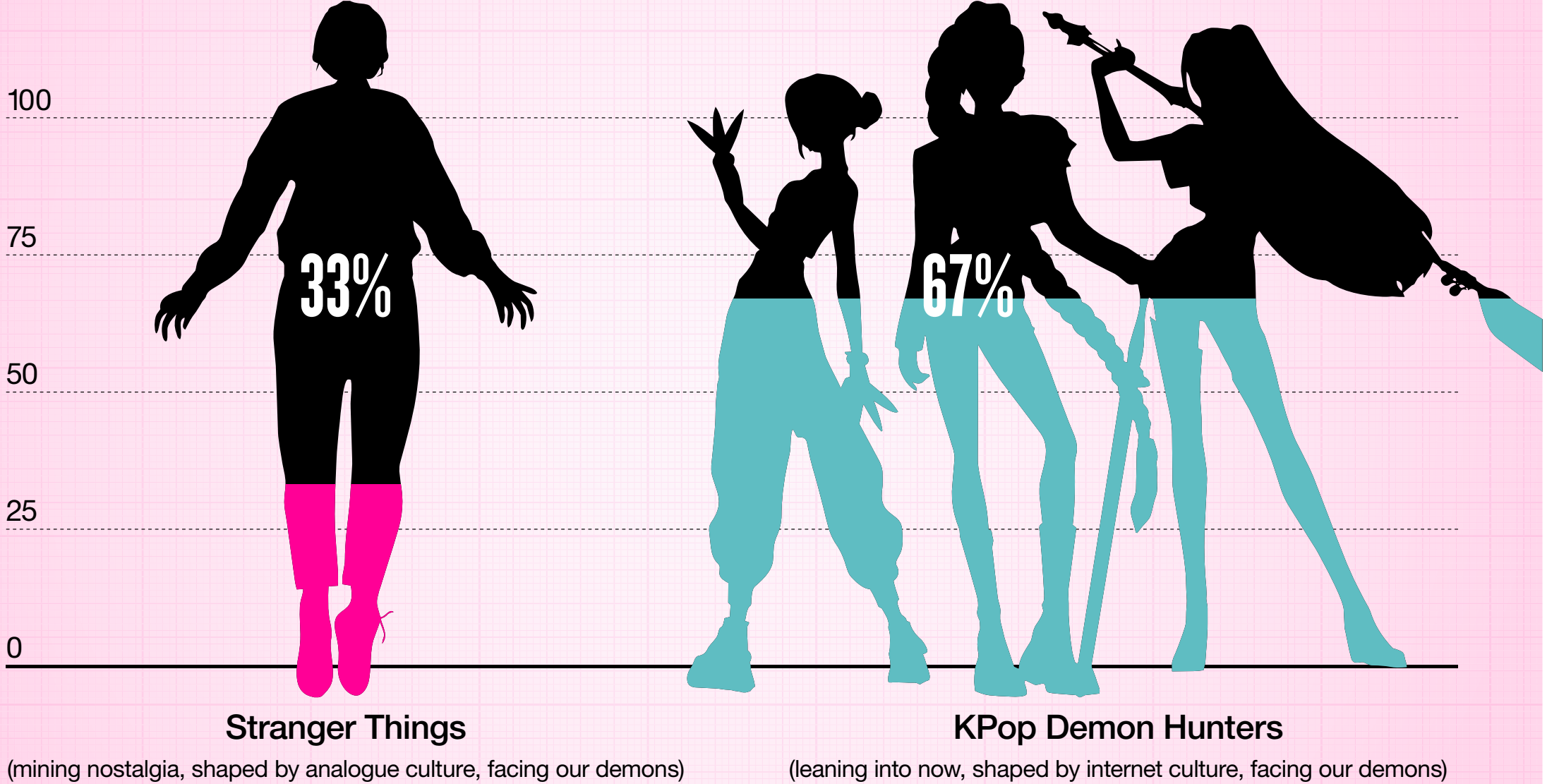
Optimism is down, but only by 3% – not bad given the challenges the industry is facing. Most of our respondents advise facing those headwinds armed with can-do K-pop energy and digital smarts

Overall I feel more _____ about the state of advertising/marketing in 2026 than I did for 2025



Source / Contagious Radar 2026

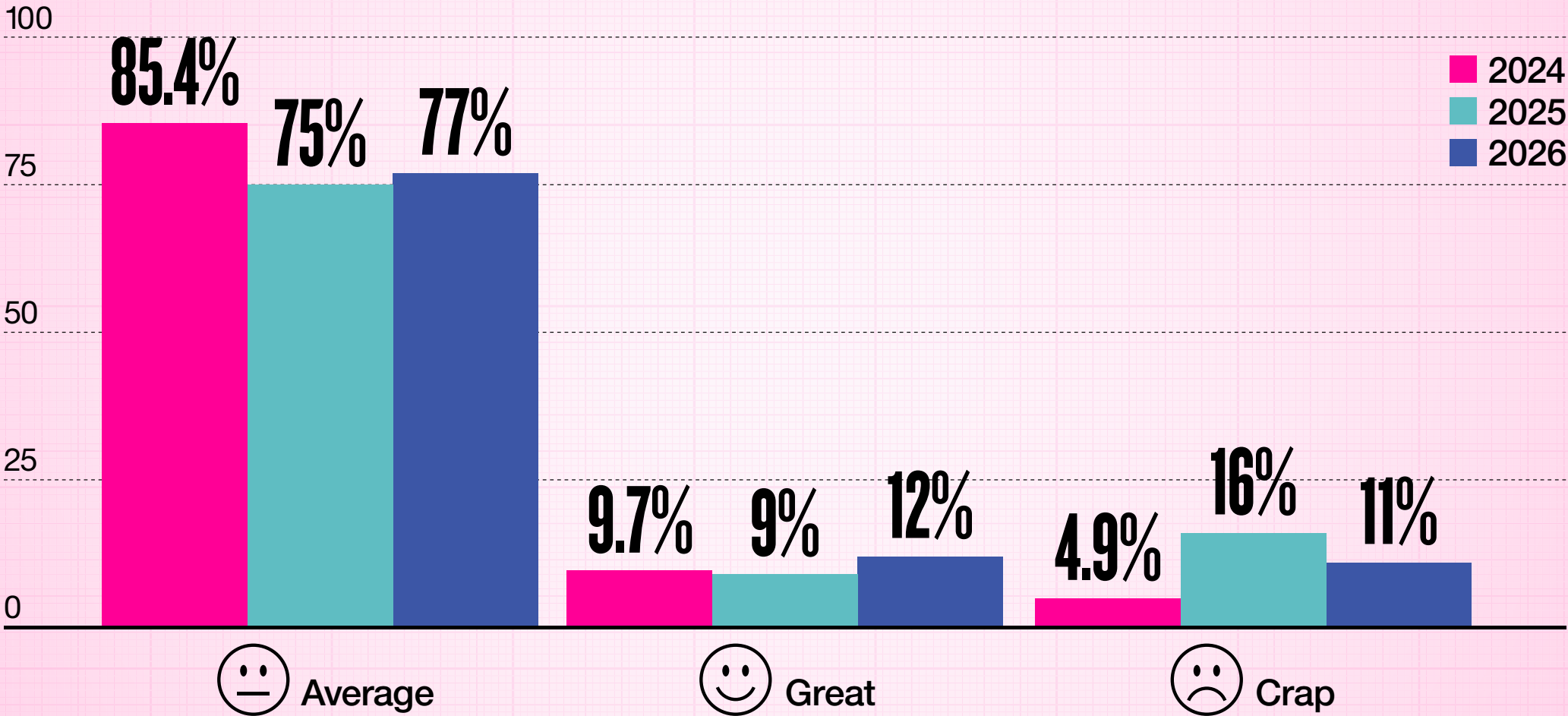
In 2026, we should all be more:



Source / Contagious Radar 2026

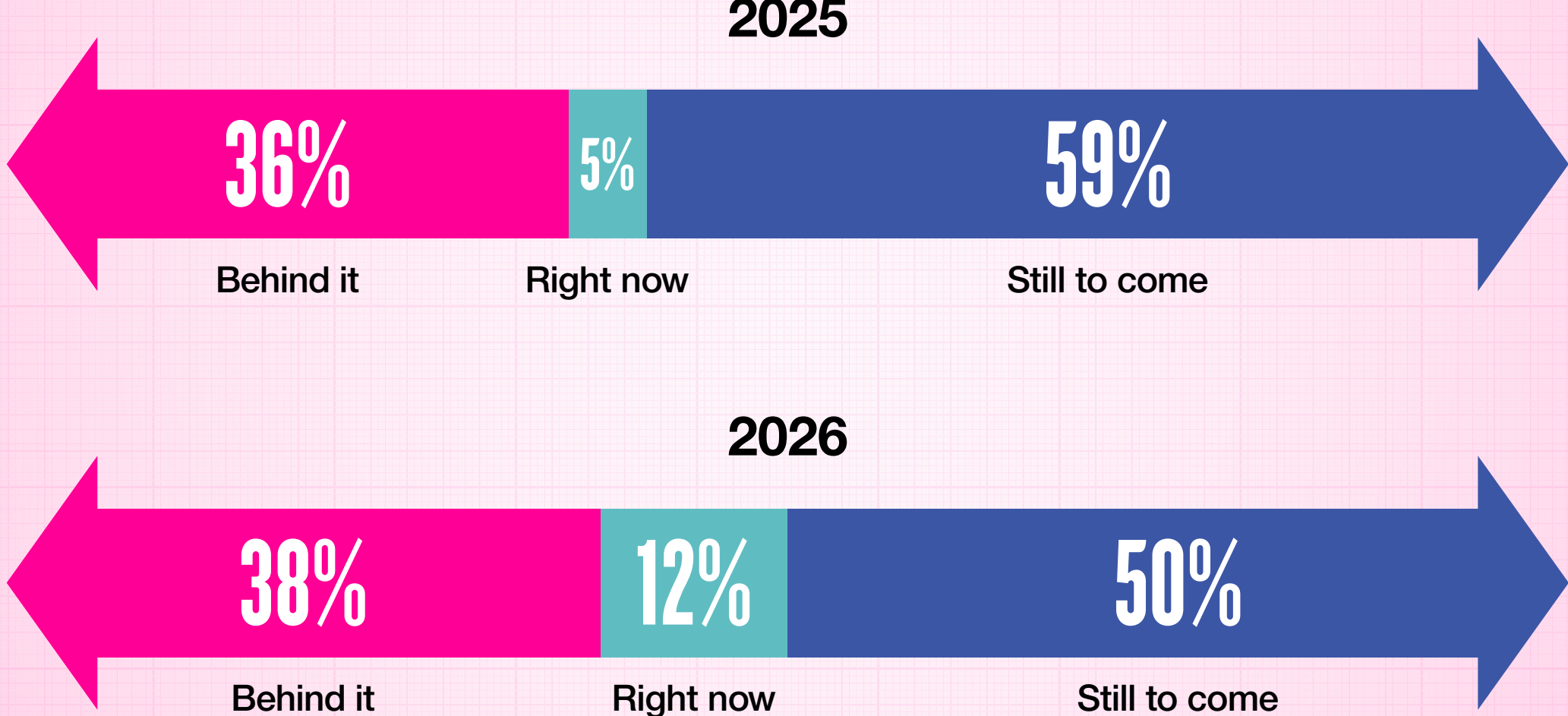
The proportion of people who think the best years of the industry are 'right now' has more than doubled year on year – but at the expense of belief in a better future. Carpe diem everybody

Right now, the output of the industry is...



Source / Contagious Radar 2026

The best years of the industry are...



Source / Contagious Radar 2026

Social as a Vice

Forget about connection – the debate around social media has shifted to protection. And that goes for brands as well as kids

The dominos began to topple in Australia last year, when the world's first ban on social media for under 16s came into effect. Spain followed suit in February 2026 and countries including Denmark, France, Germany, Greece, Malaysia, the UK, and Norway are all now moving towards state-enforced age gates in the name of protecting children.

According to [Pew Research](#), 44% of US parents believe social media is the single biggest negative influence on teens' mental health. Big Tech companies are creating 'algorithms that prey on children's vulnerabilities with the explicit purpose of creating addictions', Ursula von der Leyen, President

of the European Commission, has [argued](#). Now that claim is being tested in the courts.

In the 'KGM. v. Meta et al' trial in California, [the plaintiff claims](#) that Meta and YouTube 'built machines designed to addict the brains of children' (Snap and TikTok had already settled out of court).

UK parenting network Mumsnet is lobbying for social media to be banned for under 16s and suggests it should be treated like alcohol or tobacco. Its Rage Against the Screen campaign, via Adam&eve\TBWA, London, visually depicts social media as packets of cigarettes, complete with health warnings.



Mumsnet's Rage Against the Screen campaign, via Adam&eve\TBWA, London, doesn't pull its punches



‘Tech’s invaded
our house!’

Jessie, *Toy Story 5*

IMAGE: COURTESY OF DISNEY/PIXAR

Antisocial behaviour /

Beyond the legislation, social media may be suffering a ‘guilty by association’ effect, as negative stories pile up about the tech companies behind the platforms.

While TikTok has been [accused](#) of exposing minors to suicide content and operating like a ‘[virtual strip club](#)’, the platform’s parent company, ByteDance, has been designated a [potential national security risk](#) by the US.

An investigation by two Swedish newspapers [found](#) that contractors working for Meta felt forced to watch footage captured by the company’s AI glasses, including people going to the toilet, getting undressed and having sex.

On X, the platform’s AI chatbot [Grok](#) has described itself as ‘MechaHitler’, spewed anti-semitic posts and generated sexualised, non consensual AI images of real women and minors.

Meanwhile, [news](#) that the US Immigration and Customs Enforcement service (ICE) is planning to actively surveil Facebook, Instagram, Reddit, TikTok, X and YouTube doesn’t exactly scream ‘child-friendly environment’.

And if that wasn’t bad enough, tech is literally the villain in the new *Toy Story* film, portrayed in the trailer as addictive, making kids less likely to make friends, while also constantly surveilling them. Fun for all the family.

Brands behaving better /

If the notion of social platforms as vice products gains traction, it pulls marketers back to the debate over brand safety and where they should ethically spend media budgets. X.com remains the canary in this coalmine, with its UK [revenues dropping 60%](#) year-on-year as brands pulled their adspend from the platform due to content concerns.

WARC predicts that social ads will account for 28.4% of global adspend in 2026 – nearly doubling from 15% in 2020. Although only a fraction of that ad spend comes from brands that specifically want to reach kids, there's a significantly

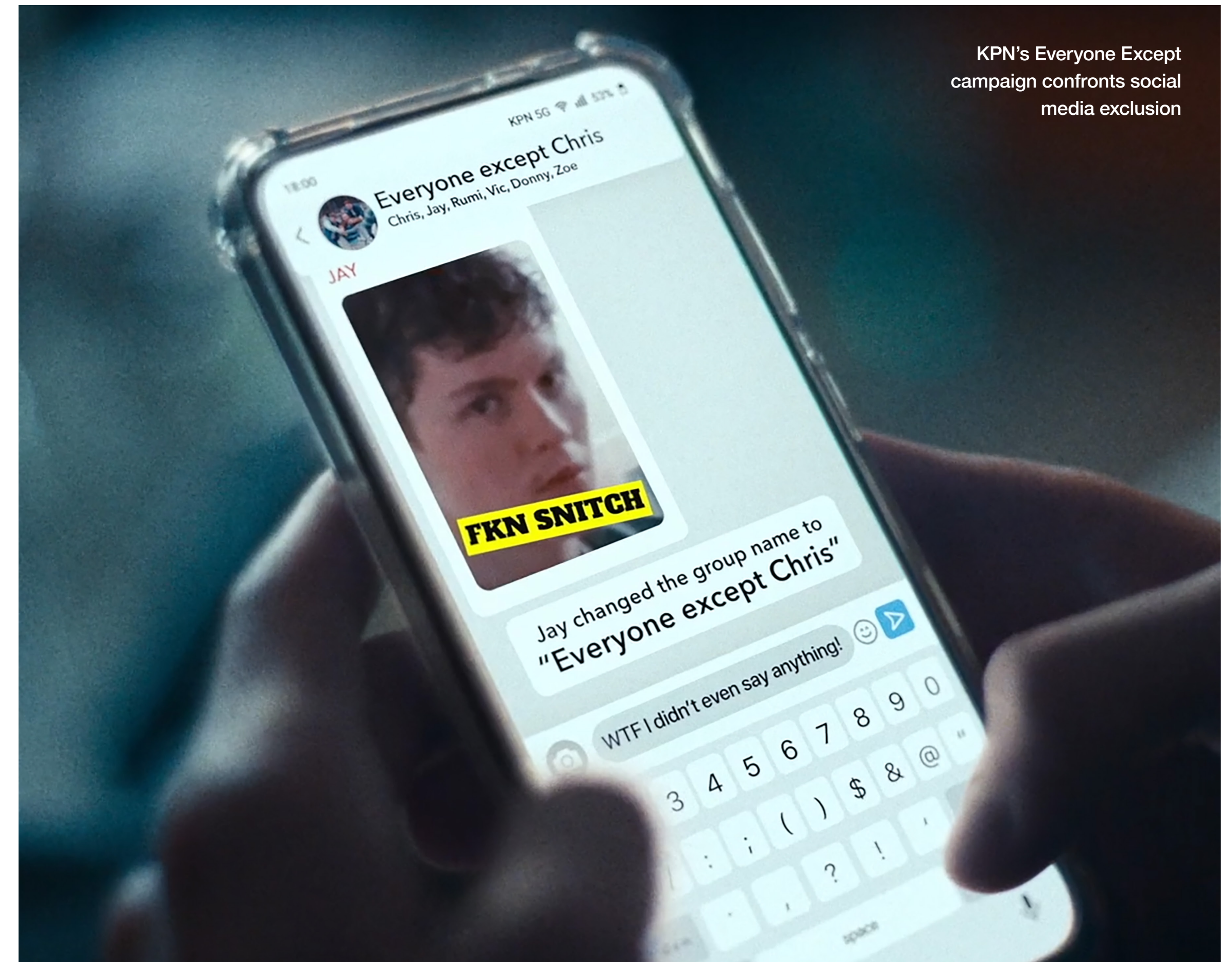
larger pool of brands that want to be seen as wholesome, principled, ethical, family friendly, healthy, responsible and generally trustworthy – not associated with unsafe environments.

Dutch telco KPN is one them, with skin in the game of maintaining online safety in order to create brand preference. Its recent [Everyone Except](#) campaign, via Dentsu Creative Amsterdam, ran on social, TV, OOH and cinema, and shows the harmful effect of teens being excluded from social group chats in Instagram, Snapchat and WhatsApp, as well as how bystanders can make a difference.

So what?

Whether they're found actually guilty of causing addiction, eating disorders and self harm, social platforms may still be convicted in the court of public opinion, with people left wondering if those negative effects extend to adults too. [Spoiler alert: quite likely].

For wary marketers, using creators offers a degree of separation between reaching engaged online communities rather than tacit platform endorsement via paid ads. Platform agnosticism creates a safety net in case the tide truly turns against one platform, as happened in the Elon-era of X. Exploring 'safer' online environments with engaged audiences, such as podcasts, reduces risk. But, dare we say it, traditional media may still be your best bet.



KPN's Everyone Except campaign confronts social media exclusion

If you're not using a light therapy mask do you even care about your skin?



IMAGE: BORYANAM - STOCK.ADOBE.COM

The Optimisation Obligation

Beauty was once an aspiration – now it feels like a duty: relentless and mandatory

In the mid-2010s, it looked like beauty was becoming more inclusive. Instead, it somehow morphed into a mandate: a duty rather than a choice, an expectation rather than an expression.

Now, in the beauty discourse of 2026, there are no ugly ducklings – but everyone must work on becoming a swan. ‘You’re not unattractive, you’re just underdeveloped,’ declares a [Substack headline](#). TikTok’s [#glowup](#) hashtag has billions of views. [Looksmaxxing](#) pushes men to [self-harm](#) and surgery to ‘enhance’ their natural features.

When the outside world feels relentlessly chaotic (see every other trend in this report), our own body is recast as the one territory that we can micromanage. Young people may never be able

to afford the home of their dreams, but ‘[getting hot](#)’ has become the ‘attainable’ goal that’s within everyone’s grasp.

Pinterest searches for ‘rebranding yourself’ rose [240%](#) year-on-year in 2025. [Dermorexia](#) – an obsession with skincare – is now a concern, with Reddit’s [r/SkincareAddiction](#) thread attracting almost [2 million](#) weekly visitors. Millions are trusting AI to ‘score’ their [complexions](#) and [features](#), contributing to a [\\$66.15bn](#) global beauty tech market.

If it sounds like a lot of effort, it is. From *Cinderella* to *Clueless*, the makeover has long been portrayed as the ticket to a fairytale ending. But the one-and-done transformation is no longer enough. Now, we must eternally work on our image and it’s as tiring as it sounds.

Get the natural look /

Cosmetic procedures were once a risky option reserved for those in search of dramatic rejuvenation. Now they're routinely used for 'prejuvenation' by younger people seeking subtle, preventative maintenance.

Sixty-two percent of Brits aged 18-34 are considering 'tweakments' – natural-looking, non-surgical procedures like fillers and Baby Botox – compared to 28% of over 35s. The skincare industry's obsession with youth feels ever more unhinged: actress Shay Mitchell has just launched **rini**, a line for kids aged three and up. Ageing is becoming optional, even for the underage.

The frontline territory of this commercially significant shift is skin, with your epidermis acting as a marker of beauty, health and youth.

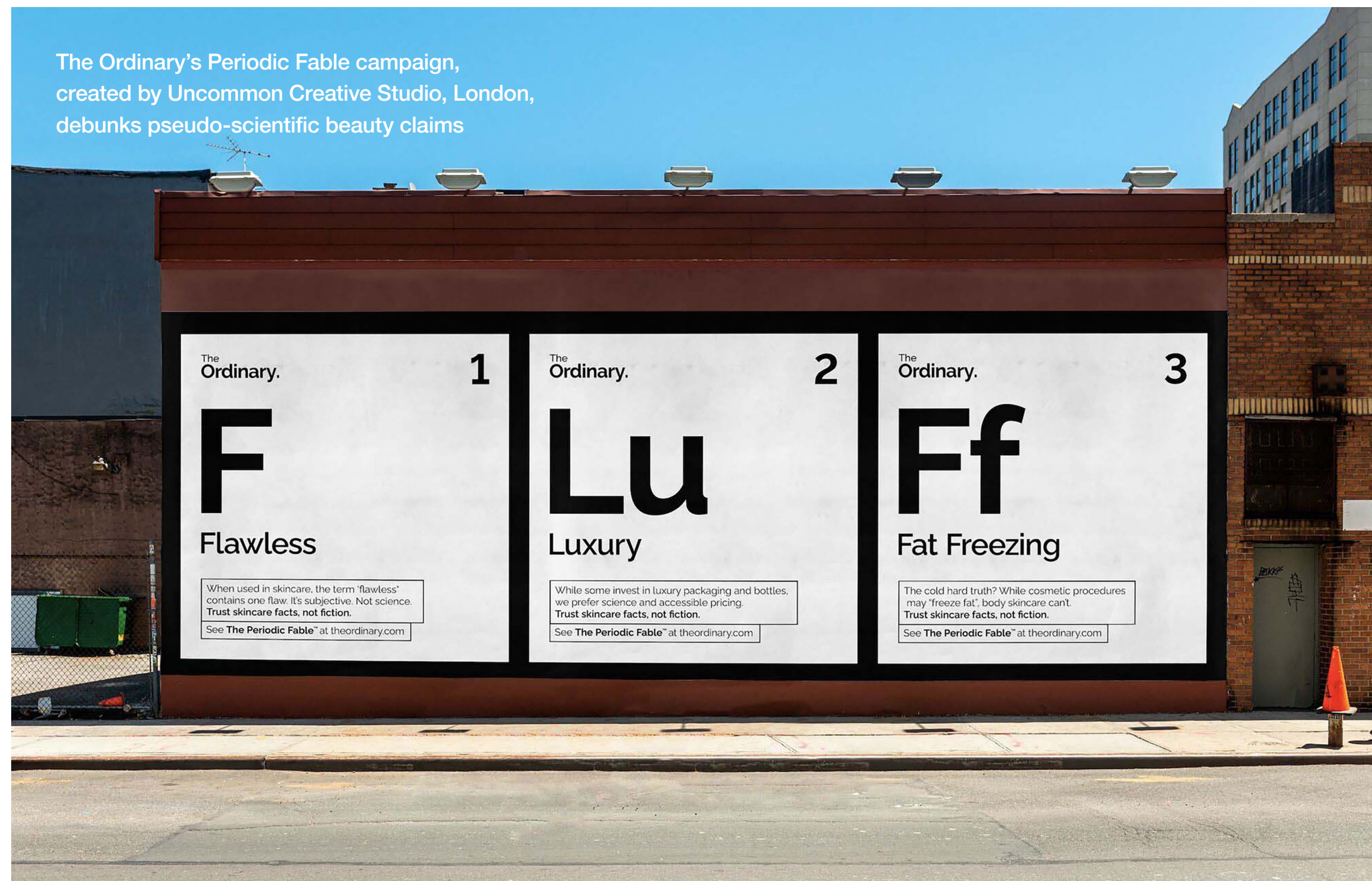
The skincare industry's obsession with youth feels ever more unhinged

Treatments associated with cellular wellness, such as red-light therapy and ice baths, have been reframed as routes to outer radiance. Aesthetics brands casually borrow clinical terminology to validate and elide beauty goals.

Pharmaceuticals complicate things further. Developed to treat diabetes, **GLP-1 drugs** have democratised weight loss, while unwittingly rebooting the toxic 'skinny culture' that took years to dismantle. Is 'getting hot' supposed to feel this complicated?



Rini, the new skincare line for children aged three and up, has raised some eyebrows (non-surgically)



Focusing on feeling /

‘The society of achievement produces exhausted and depressed individuals,’ wrote *The Burnout Society* author Byung-chul han. In the beauty space this is particularly ironic: red-light masks become redundant when the pursuit of beauty itself is giving us eye bags and anxiety.

Brands won’t stand out by contributing to the chorus of pressure – but there’s value in making consumers’ lives easier. *The Ordinary* has emerged as an honest broker by debunking the bullshittification of beauty claims. ‘We are not clean, we are clear,’ Amy Bi, global brand VP at The Ordinary, told Contagious last year, ‘clear in pricing, our transparent communication, our humble voice, our championing of science, and our ingredients’.

As fatigued customers move from self-improve-

ment towards self-care, experience could also offer a gentler and more distinctive focus than outcome.

The forecasting platform *WGSN* predicts a turn towards products that ‘put intuition on par with science’. For example, *half of UK customers* would swap their go-to beauty products for mood-enhancing alternatives like *neurocosmetics*. Westerners are exploring Taoist beauty and wellness practices like qigong to – controversially – ‘*feel Chinese*’. Meanwhile, brands like Somerset-based perfumer *Ffern* are focusing on natural sourcing and environment-led storytelling as a softer way to build trust.

The switch in narrative here is subtle, but significant. It stops being ‘feel good to look good’ and becomes something that really is universally attractive: feeling good.

So what?

‘What people want, in short, is to be transformed,’ writes *The Transformation Economy* author Joseph Pine. But in a world where other forms of growth feel out of reach, we’ve settled for just looking transformed instead.

Beauty has become a proxy for meaning. Visual identity has become a mobility tool. We’ve normalised the monetisation of our own ‘personal brands’. Perhaps the goal is to go beyond helping people look like they’re flourishing – and help them actually feel it.

The Death of Aspiration

When traditional milestones no longer feel attainable, what takes the place of those long-term ambitions?

Brands have always succeeded by selling progress: buy this and you'll get ahead, look better, earn more, be someone. But that bargain only works if people believe a better future is attainable. That belief is evaporating.

In the US, [49% of Gen Z](#) say that planning for the future is 'pointless' – and it's easy to see why. In 1980, the median age of a US homebuyer was 31. [Today it is 59](#). Across much of southern England and London, the average home is affordable only to the [top income decile](#).

Younger people are delaying milestones like

marriage and parenthood but 'this is not an era of glorious exploration,' [argues](#) academic Bobby Duffy, 'it is enforced because of the economics.'

A century ago, Henry Ford raised wages and cut hours, recognising that his profits relied on workers ability to spend and save. Today, Elon Musk suggests young people needn't plan for retirement because 'billions of robots will make you anything... for basically next to nothing'.

But if technology ultimately provides everything, the consumer has no productive role and little stake in the future. That leaves the 'progress' contract brands had with their buyers in shreds.



SÄBÖVIK
Double bed
3795:-



Wherever life goes

A more modern perspective on milestones from Ikea's Wherever Life Goes campaign, by Åkestam Holst NoA



Treat culture staples: the Erewhon smoothie and the Labubu blind box

Carpe Diem culture /

As belief in upward mobility falters, attention turns to the present. Ipsos data shows **66% of people** globally agree with the statement 'I live for today because the future is uncertain'. What they're choosing instead isn't so much **nouveau nihilism** as it is nouveau Thoreau. The American writer observed 'The price of anything is the amount of life you exchange for it.' And fewer people are willing to exchange life for a career win.

Among Gen Z, **just 6%** identify senior leadership roles as a top career goal. Instead, they're embracing a more selective form of ambition that places greater value on time. The rise of 'professional minimalism' reflects that shift – rejecting

Ipsos data shows 66% of people globally agree with the statement 'I live for today because the future is uncertain'

total commitment to employers in favour of balance, flexibility and autonomy.

'Buy now, pay later' services are disproportionately used by consumers in their 20s and 30s, fuelling the sector's **projected growth** to \$37bn by 2030. Collectibles, fandom culture and the nostalgic tendencies associated with 'Kidulting' offer manageable wins. 'Adults are looking for something small, something affordable, a simple pleasure to compensate emotionally for the pressures of adulthood,' **says** Olivia Tykocki, research director at Sago.

The micro-indulgences of treat culture – that \$20 Erewhon smoothie, the \$30 Labubu blind box – offer instant gratification in a world where deferring gratification feels like futile optimism.

Aspiration, but adjusted /

For brands that historically sold the idea of ‘progress, eventually’, it may be time to recalibrate.

Research consistently shows that balancing money, meaning and wellbeing takes precedence for Gen Z and millennials. Instead of asking ‘How do we help consumers get ahead?’ brands need to ask, ‘How do we make their present feel worthwhile?’

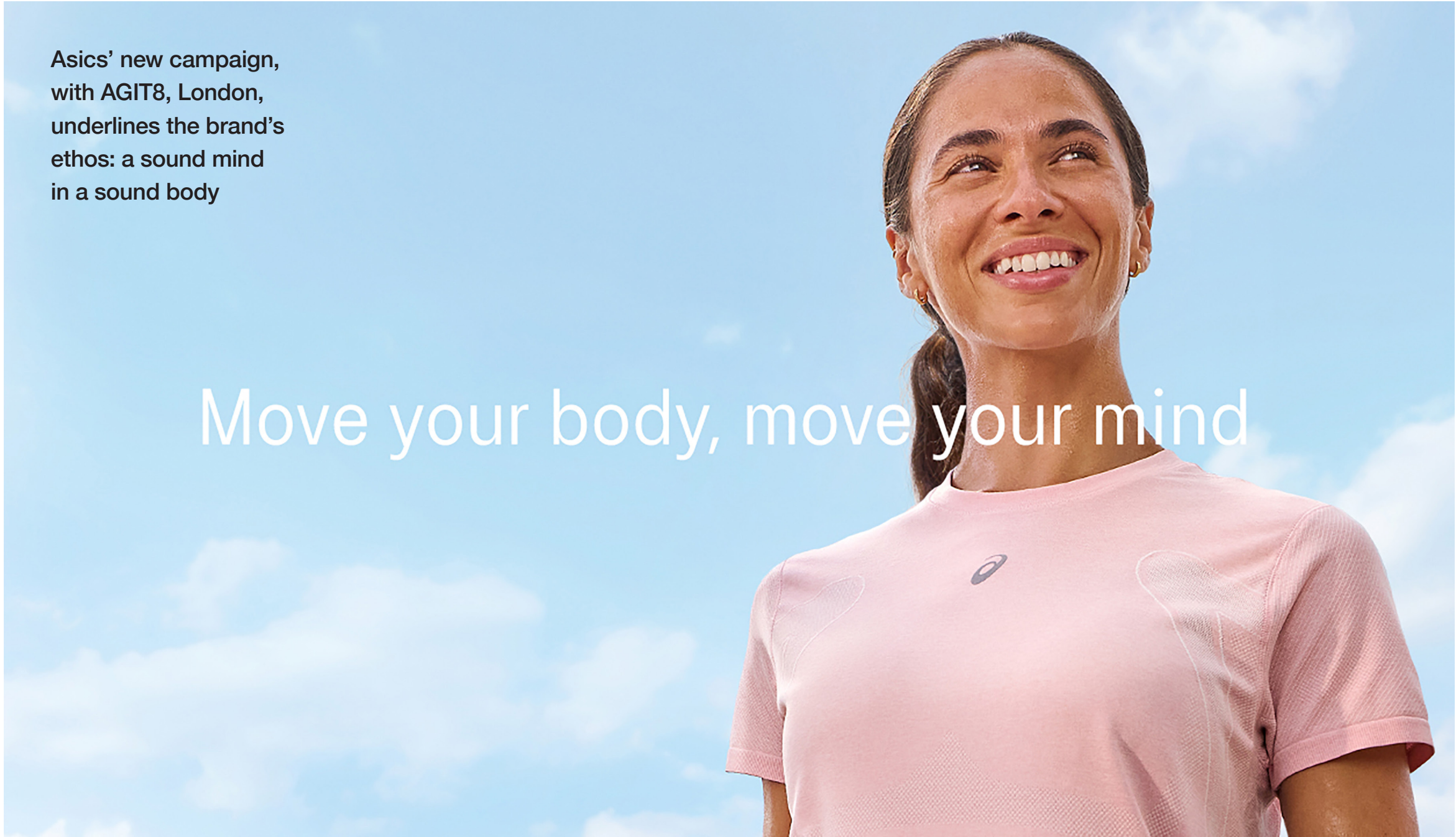
Ikea’s recent **Wherever Life Goes** campaign captures this perfectly. Everyday moments – a first kiss, an ultrasound scan – are given emotional weight through restrained storytelling and a strategically placed price tag (or tags). This is emotional work for low-cost, routine products designed to reflect purchases that happen at key life stages. The whole point is that each of those stages feels affordable.

When long-term commitments feel risky, reducing that anxiety can unlock new revenue streams. Fashion app startup **Croissant** does that by integrating future resale directly into retailers’ checkout processes. Its ‘shop now, sell later’ model makes reframes premium purchases as investments as much as outlays.

Sportswear brand **Asics**, meanwhile, has leaned into mental wellbeing rather than the competitive grindset endorsed by rival brands. It’s about engagement, not achievement – it positions the experience of exercise as a reward in itself, not a grudging route to fitness in a way that feels more accessible.

This reframe of aspiration doesn’t mean abandoning long-term propositions. But it elevates the importance of making value feel emotionally legible in the here and now.

Asics’ new campaign, with AGIT8, London, underlines the brand’s ethos: a sound mind in a sound body



Move your body, move your mind

So what?

For more than a century, brand logic has relied on the assumption that life moves in one direction: forward. The reward for effort, patience and consumption was a better tomorrow.

Aspiration isn’t dead, but it’s different. When the state of tomorrow feels like a coin-flip, no wonder people want to focus on investing in today.

Blips

Major trends have to start somewhere. We'll leave you with five final signals we can't stop thinking about: some uncomfortable, some overdue, all worth your attention



1

The What-ening? /

'The great disembowelling of white collar jobs' is looming, with the IMF predicting 40% of positions globally will be affected. Props to [Andrew Yang](#) for nailing the vibe by naming this onrushing catastrophe 'The Fuckening'.



2

The Femtech backlash /

Women are sick of being treated like products on dating apps and being the victims of sexualised deepfakes. A feminist techno backlash is long overdue – could this be the year it [finally happens?](#)



3

Subscription fatigue /

Gen Z is rejecting the empty promise of 'access over ownership'. Subscription growth [is slowing](#) while physical media is on the up: US vinyl sales just passed the [\\$1bn mark](#) for the first time since 1983.



4

Way mo' Waymo /

The robotaxi pioneer is now in 10 US cities and testing cars in London. It should pass [1 million rides](#) per week by the end of 2026 – assuming partners DoorDash continue to help with [closing doors](#).



5

Good Bones /

Dinosaur skeletons are becoming an [asset class](#) – with scarcity, antiquity and the whiff of Sam Neill in *Jurassic Park* as standard. Big bones mean big price tags: think upwards of \$10m and tell yourself museums don't need them anyway.



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