

CHINA MAR-COMMS TRENDS 2026

HUMAN-MACHINE
COLLABORATION RISES,
HUMANITY STAYS CENTRAL.

CATEGORY

AUDIENCE

OUR TREND OBSERVATIONS IN 2025 (OMNICOM MEDIA & TBWA)

CULTURE

2025上海车展深度观察
咫尺潮涌 共驱



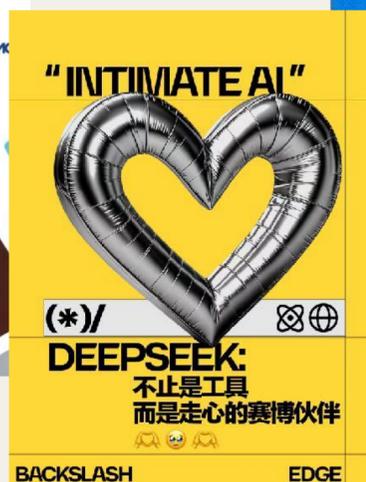
联名消费趋于理性，奢品IP合作更需真共鸣
奢侈品IP联名趋势及受众洞察



探品质脉络
溯财富之途



咖啡茶饮共生格局下
打开颠覆式增长新机遇



在冲击 全球动画电影第一！
《哪吒2》百亿票房背后的魔法揭秘

FOREWORD

The emergence of DeepSeek has left a distinct imprint on our era: we stand at the crossroads of breakthroughs in machines and technology, which are transforming people's lives and our marketing landscape at an unprecedented pace.

Driven by an intensifying pursuit of self-fulfillment, we observe that consumers are not blindly pursuing cutting-edge sophistication but equally valuing authenticity. Safety and reliability have become key annual themes in the Automobile category. As generative AI content increasingly enriches online contents, people are also more eager to return offline and personally engage in various cultural and entertainment activities; Equally compelling as brands launching technologically advanced products is their sincere engagement with consumers' voices in the comments section...

This underscores a core insight: the highest achievement of machines and technology is to enhance life so seamlessly that their presence goes unnoticed. Therefore, while looking forward to new technological advancements in the coming year, we believe: 2026, human-machine collaboration rises, yet humanity strays central, this will be theme of the year, also a theme that runs through the marketing strategies.

2026 HUMAN-MACHINE COLLABORATION RISES, HUMANITY STAYS CENTRAL



2021
Year of
Restart

2022
Year of
Experience
and Innovation

2023
Year of
Healing

2024
Year of
Resolution

2025
The Age
of Resilience

RESEARCH OBJECTIVES AND BACKGROUND

The marketing landscape for 2026 has been unveiled, ushering the industry into a new phase of deep technological empowerment alongside the resurgence of human-centric values. This represents not only a methodological iteration but also a fundamental shift in mindset—brands must adeptly leverage technological capabilities while resonating with human sensibilities.

As the media agency and creative agency under Omnicom, Omnicom Media and TBWA jointly present the “2026 CHINA MAR-COMMS TRENDS.”

Omnicom Media Center of Excellence is dedicated to observing consumers' daily lives, media consumption habits, and market dynamics, forecasting marketing trends with a visionary perspective; TBWA is dedicated to establishing cultural influence within the realm of creativity, deeply exploring cultural insights and forecasting leading cultural trends.

This time, we have convened experts specializing in media marketing, strategic insights, and creativity to deliver a comprehensive and in-depth trend analysis through cross-boundary and multi-level collaborations.

An original trend research methodology leveraging the combined strengths and resources of Omnicom Media and TBWA:

- Based on the tracking of consumers' culture, values, consumption behaviors, and media habits.
- Based on the macroeconomic environment and marketing industry development trends, and technology developments.
- Years of accumulated experience in marketing strategy.
- Collaborative analysis and communication among marketing experts across various industries to jointly explore trends.

We think that the marketing transformation in 2026 will be driven by three forces, which form the foundation of our multi-dimensional vantage point for trend analysis:

- Firstly, trends in media application and development (micro-level opportunities) These define the new methods and scenarios through which a brand can engage and influence consumers.
- Secondly, consumer and consumption market trends (meso-level application). It addresses how consumers make decisions, how they consume, and how they live.
- Thirdly, cultural trends (macro-level insights). It reveals the prevailing zeitgeist we are experiencing and predicts the key topics that will influence consumers, defining the cultural tone throughout 2026.

01 「 Search Reimagined



MEDIA APPLICATION AND DEVELOPMENT



Augmented Humanity」



04

Rational Sensationist」 05



07



Mood Geisting」

09



Maturity Paradox」

03 「 Omnichannel Retail



CONSUMERS AND CONSUMER MARKETS

SheSports Economy」



06

CULTURE



08

「Stability Pursuit

10



「 Neo-Collectivism in Football

CHINA MAR-COMMS TRENDS 2026

02 「 Contextual media



SEARCH REIMAGINED

Are evolving and upgrading through ai. Ai is profoundly reconstructing the entire search ecosystem in terms of search methods, result presentation, value, and functionality.

The reason behind:

Ai search enables consumers to get answers directly through natural language interaction, reshaping search habits.

Search is no longer merely about "providing information"; it now encompasses generating creativity, leisure entertainment, and decision-making support, thereby elevating consumer expectations—consumers increasingly anticipate a one-stop service covering needs comprehension, solution generation, decision support, and transactions.

2026

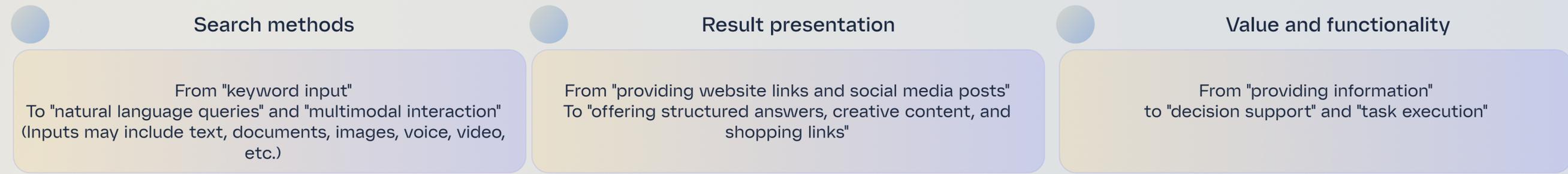
The value of search is evolving from a traffic entry point to a hub for task execution and transaction facilitation.

Consumer search needs will shift from information gathering to decision-making and problem-solving. The competition in the search industry will expand from "information accuracy" to encompassing services across the entire consumer journey, from discovery to decision-making and purchase.

OUR OBSERVATIONS



1.1 The emergence of ai-native applications has become a new search entry point, fundamentally transforming consumers' search needs.



Search methods

From "keyword input"
To "natural language queries" and "multimodal interaction"
(Inputs may include text, documents, images, voice, video, etc.)

Result presentation

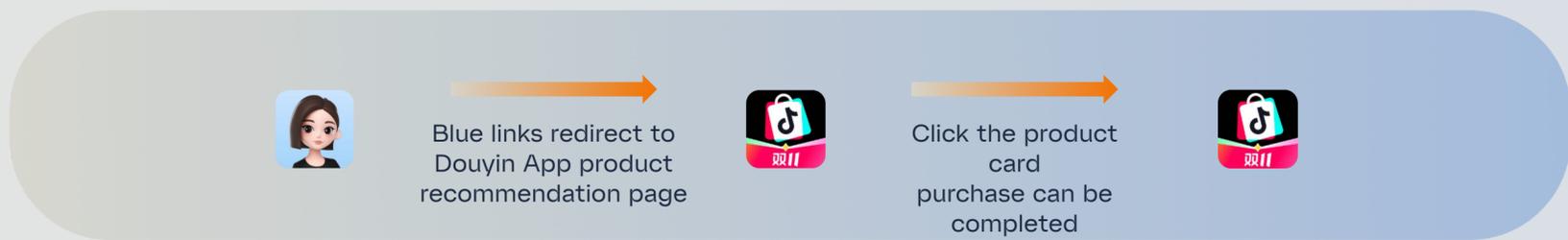
From "providing website links and social media posts"
To "offering structured answers, creative content, and shopping links"

Value and functionality

From "providing information"
to "decision support" and "task execution"

	Doubao	DeepSeek	Tencent Yuanbao	Kimi
APP MAU October 2025 (in ten thousands)	19,686	14,175	3,498	942
Multimodal Capabilities	<ul style="list-style-type: none"> Text Documents Images Voice Video 	<ul style="list-style-type: none"> Text Documents Images 	<ul style="list-style-type: none"> Text Documents Images 	<ul style="list-style-type: none"> Text Documents Images
Major Application Scenarios	<ul style="list-style-type: none"> Content creation Copywriting generation Social media content optimization Virtual character dialogue 	<ul style="list-style-type: none"> Programming assistance Document processing and learning support Business data analysis and solution planning 	<ul style="list-style-type: none"> Programming assistance Creative writing Office support and document processing 	<ul style="list-style-type: none"> Learning support Knowledge base Q&A: upload documents for Q&A based on the knowledge base Creative writing Language translation, multilingual interpretation

Beyond providing information and creativity generation, AI-native applications have begun integrating shopping links directly into responses. [Doubao] began offering shopping links within AI responses during Double 11 to drive traffic to Douyin Mall



OUR OBSERVATIONS



1.2 Various search platforms begin reconstruction and upgrading through AI integration

Traditional search engines:

Upgrade search into comprehensive intelligent agents using AI, integrating services from multiple ecosystem partners

Baidu upgraded the search box to an "intelligent box", supporting input of over a thousand characters and enhancing multimodal input functionalities



64%

of AI-generated content on Baidu mobile search result pages (as of July 2025)

Social search platforms:

Transform on-platform search functionalities with AI, Incorporating proprietary content, e-commerce, and service ecosystems.

WeChat search upgraded "AI search" to a primary entry point; AI search results deeply integrate content and services from the WeChat ecosystem, including official accounts, mini-programs, and video channels

The Douyin App has introduced an "AI search" page within its search functionality, where AI integrates content from the Douyin ecosystem to answer queries and recommend relevant short videos.



Over 300 million

Douyin AI search daily average page views

E-commerce search platforms:

Leverage AI capabilities as personalized shopping assistants to facilitate transactions

During Double 11 in 2025, e-commerce platforms launched various "AI shopping" features within their apps, including AI search, AI personalized recommendations, AI virtual try-on, etc.



IMPLICATIONS

1

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#1 Implement generative engine optimization (GEO) to improve brand visibility, accuracy, and recommendation rates in AI-generated answers.

Develop a brand content matrix tailored to different AI platforms. Content should not only present product introductions but also incorporate high-information-density decision support materials such as product comparisons, user reviews, purchase guides, and case studies. Integrating multiple formats such as images and text, video, and audio to meet the requirements of AI multimodal understanding and generation. Enhancing content authority by referencing industry data, expert opinions, and authoritative endorsements, ensuring brand content is accurately interpreted and recommended by AI, thereby influencing consumers' perceptions.

#2 Optimizing e-commerce functionalities across various search platforms to guarantee that consumers, once attracted by brand information on any platform, can complete the purchase of goods on any platforms.

AI-driven restructuring across platforms has disrupted the traditional funnel of "reach—consideration—conversion" in search marketing, empowering each search platform to directly facilitate decision-making and conversions. In response to this landscape, brand search marketing strategies must ensure that consumers can seamlessly complete conversions after being engaged by brand information on any platform. It is essential to optimize e-commerce resources across various platforms to guarantee the provision of product links or lead capture channels during AI-driven conversations.

POINT OF VIEW



CONTEXTUAL MEDIA

Contextual media refers to the automatic activation of corresponding media channels and content by identifying the specific scenario in which the user is located, thereby achieving precise targeting. By 2025, devices and platforms in everyday scenarios such as travel, home life, and shopping will increasingly be capable of accurately capturing consumers' actions and behaviors within specific contexts, triggering relevant services or information.

The reason behind: consumers frequently multitask, switching between work, social, and other scenarios while interacting with multiple screens. Their needs are often instantaneously triggered in dynamic contexts. Media that can promptly respond to these evolving demands and provide relevant, real-time information is increasingly aligned with consumer requirements.

2026

Contextual media will be rapidly deployed.

It emphasizes a shift from "people seeking information" to "information seeking people", facilitating brand communication at the precise moment when consumer needs emerge. A human-centered approach delivering the right content or service to the right person, at the right time, through the right media, and in the right place.

Transportation scenarios: As the vehicle approaches the residential community, the “Home mode” is automatically activated.

Leading enterprises such as Xiaomi, Huawei HarmonyOS, BYD, China Mobile, and China Unicom are actively driving the transition of the “People-Vehicle-Home” Full-Scenario Smart Living from concept to reality.



Home life scenarios: AI Smart home - Lights turn on upon arrival, enabling seamless lighting control.

At the perceptual level, technologies such as millimeter-wave radar, biosensors, and environmental sensors have become more mature, enabling precise recognition of human movement trajectories. At the analytical level, AI large language models have been widely commercialized, capable of analyzing perceptual data, comprehending complex language commands and semantics, and accurately identifying consumer needs.

Shopping scenarios: When customers pick up a product, the shelf screen automatically displays relevant product information.

Offline retail stores are increasingly adopting intelligent sensing shelves; at the counter, when customers pick up a product, the screen automatically detects this and begins playing detailed product introductions, highlighting features and selling points.



OUR OBSERVATIONS

IMPLICATIONS



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#1 Identify which temporary and emergent consumer needs the product can fulfill, transforming advertisements into timely and useful "services."

Brands can transition from emphasizing product functions to uncovering consumers' temporary or emergent needs across various scenarios, focusing on which specific needs the product can address at particular moments in the consumer's life. For example, beauty brands can collaborate with smartwatches to monitor Consumers' sleep quality and, in the morning, synchronize sleep data while reminding Consumers that "sleep deprivation may cause dull skin; we recommend using our products to improve it."

#2 Consider partnering with mature ecological platforms, leveraging their capability to coordinate cross-device and cross-scenario reach for precise and efficient scenario-triggered marketing.

Ecological platforms typically encompass the full Consumer ecosystem across scenarios, including smartphones, tablets, smart screens, and in-car systems, enabling coordinated engagement across devices. Regarding data, system-level, device-level, and application-level data can be integrated to create unified user profiles and comprehensive cross-scenario user behavior analysis. Through multi-terminal collaboration, precise user insight, efficient content distribution, and data-driven continuous optimization, ecological platforms can effectively execute scenario-triggered marketing, delivering higher user reach and conversion rates for brands.

POINT OF VIEW



OMNICHANNEL RETAIL

In 2025, against the backdrop of consumers embracing omnichannel shopping as the norm, the retail industry is experiencing profound transformation. Instant retail is thriving, progressing toward "full-category penetration", and connecting as well as revitalizing the offline physical retail network. On the other hand, e-commerce platforms are actively transcending the boundaries between online and offline, accelerating the strategic implementation of omnichannel retail.

The reason behind: consumers' shopping journeys are becoming increasingly diversified and fragmented. By 2025, the average number of apps used monthly by consumers increased to 28.7, with fast-moving consumer goods purchased through more than seven channels annually on average. These media consumption behaviors are prompting retail platforms to accelerate the integration of online, offline, public, and private domain channels to deliver a seamless shopping experience.

2026

The retail industry will evolve towards "omnichannel retail", transitioning from a "channel-centric" mindset to a "consumer-centric seamless experience" approach. This new retail model integrates online and offline channels, as well as public and private domains. Under this model, consumers will experience seamless and frictionless transitions across different channels. Shopping will no longer be a "task" confined to specific channels but a "state" where consumers can obtain products and services anytime, anywhere, and at their convenience.

OUR OBSERVATIONS

Instant Retail is rapidly developing, enhancing supply chain efficiency, and laying the foundation for the advancement of omnichannel retail.

The market size of Instant Retail in China is projected to reach

971.4 billion yuan

In 2026, it is expected to surpass

1 trillion yuan

E-commerce platforms are intensifying their investment in omnichannel retail.

Taobao Builds All-in-One Consumption Platform: Taobao has been comprehensively upgraded to a "Shopping · Food Delivery · Travel" All-in-One Consumption Platform, launching a new Taobao VIP membership system. It integrates Alibaba ecosystem platforms such as Ele.me, Fliggy, and Hema, covering all-consumption scenarios including shopping, food delivery, travel, and transportation.



Sam's Club is operating omnichannel, achieving counter-trend growth amid significant adjustments in the retail industry.

The total number of Sam's Club stores in China has reached 60 (including those yet to launch). As of mid-November 2025, Sam's Club China's sales have surpassed 120 billion yuan.

Multi-dimensional Touchpoints: Deep integration of APP, WeChat ecosystem, JD.com, and Offline stores

The model that combines warehouses and stores: Stores and Cloud Warehouses enabling delivery within hours

Tiered Membership Operations: Push notifications to regular members Upgrade invitations and experiential benefits to guide member upgrades Enhance loyalty and renewal rates through points cashback for premium members

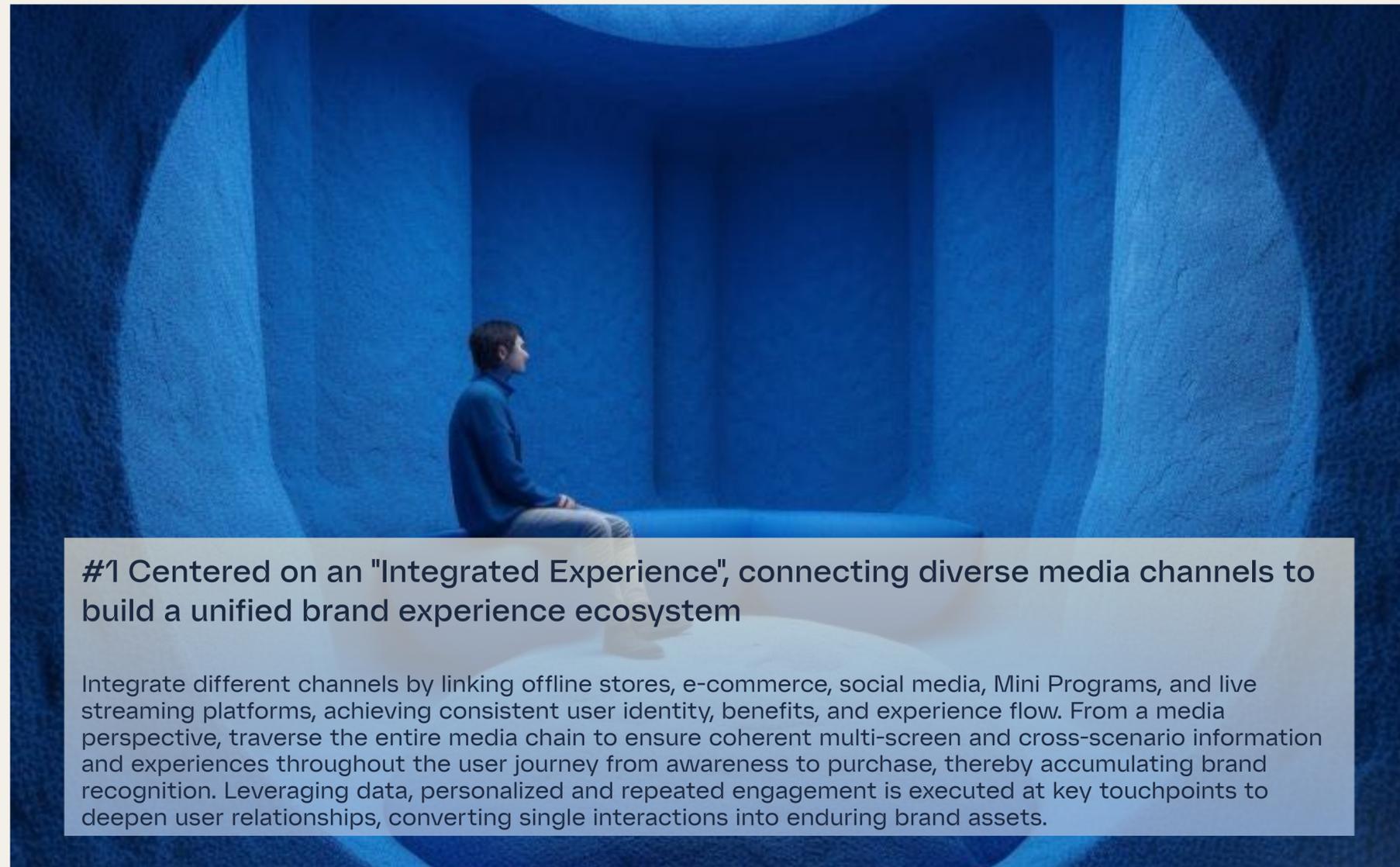


IMPLICATIONS

3

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POINT OF VIEW



AUGMENTED HUMANITY

People are using generative AI, smart wearable devices, and other tech tools to boost their abilities. Gradually, they're reaching levels of personal effectiveness and quality of life that used to be hard to achieve.

The reason behind: in a world that's getting more complex and driven by AI, folks want to use technology to "level up" and become better versions of themselves. They want to keep up with or even stay ahead of the times. This helps them feel more in control of their lives and more confident in their abilities.

2026

The driving force behind consumer purchasing will shift from "using products" to "becoming a stronger self."

Consumer shopping motivation will shift from "using products" to "becoming a better self." Consumers will proactively leverage various technological products to enhance their physical abilities, sensory functions, health status, cognitive capabilities, and creativity. They are trying to break through physiological and psychological boundaries, unlocking human potentials.

OUR OBSERVATIONS

Perceptual enhancement: utilizing technology to extend visual and auditory senses, enabling extraordinary perceptual capabilities.

During Double 11 in 2025.
Year-on-year sales growth of AI glasses on the JD.com

+346%



After wearing AI glasses for three days, I decided to make it my all-day life assistant.

During my morning commute, the navigation route is displayed right before my eyes, eliminating the need to look down at my phone and greatly enhancing safety when crossing the street. When I see moments I want to capture, I simply speak, and it takes the photo for me; the first-person perspective feels remarkably authentic. It also acts like an assistant always on standby. In meetings, when encountering foreign language materials, a brief glance triggers instant translation; I can even complete purchases by looking at the payment code and speak.

— Red user @ZENGHY

Cognitive leap: AI evolves into a "second brain", broadening the horizons of thinking and creativity.

Monthly Active Users of AI-Native Applications
(October 2025)

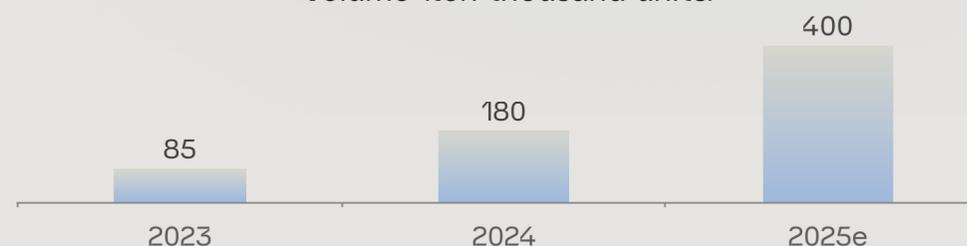
304 million

Growth Rate of Monthly Active Users of AI-Native Applications
(October 2025 vs. the same period last year)

+190%

Preventive Health Monitoring: Transforming health status perception from vague awareness to imperceptible and precise prediction

Global smart ring shipping volume (ten thousand units)



My AI equipment has reached the next level; I have begun using a smart ring. Simply wear it—effortless and imperceptible. 24-hour monitoring of heart rate, blood oxygen, and body temperature; the app instantly generates health reports, ideal for those who dislike wearing watches.

— Red user @HollowBrick

Physical Function Optimization: Technology-assisted limbs and movements, transcending the biological limits of physical strength

Growth Rate of Social Media Volume Related to Exoskeletons
(January 1, 2025 – December 24, 2025 vs. the same period last year)

+ 178%

In 2025, the exoskeleton AI smart shoes presented at the 8th China International Import Expo can provide power assistance to users, increasing walking speed by 2.5 to 3 times



IMPLICATIONS



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#1 Highlight the value proposition of "augmentation" by positioning the product as a "personalized growth companion."

The core of marketing shifts from "persuading purchase" to "empowering growth." When engaging with consumers, clearly define which aspect of the user experience our product primarily enhances, emphasize the contrast between scenarios before and after "augmentation", and quantify the impact using data—for example, "providing you with an extra hour daily to spend with your family" or "notifying you two days earlier of a decline in your immunity."



#2 Emphasize humanity storytelling

Avoid cold and impersonal emphasis on technology; return to the value of humanity, emphasizing that technology is a tool serving people. Its ultimate goal is to enhance consumer experience, emotion, and well-being, rather than to replace humanity. Specifically, build an engaging and interactive brand persona, employing stories rather than parameters to illustrate how advanced technology integrates into daily life and brings small yet genuine changes to the average consumer.

POINT OF VIEW



RATIONAL SENSATIONIST

Left hand "discounted food delivery", right hand labubu. Consumers embody both rationality and emotion during shopping. Rationality forms the foundation of consumption, reflected in budget control and the relentless pursuit of cost-effectiveness. Emotion represents the highlight of consumption, paying for beloved GOODS.

The reason behind: within the context of stabilizing economic development, consumers have developed a highly astute and self-consistent life strategy: practising scrupulous budgeting in daily high-frequency consumption, making rational choices; While in THINGS that evoke deep emotional resonance, they are willing to pay an "emotional premium" to "invest in better life experiences" and "express their selves."

2026

Thrifty "rationality" and indulgent "emotional spending" will become the new consumer trend. Consumers will become increasingly savvy in everyday high-frequency purchases, seeking the ultimate cost-performance ratio. However, when faced with high-quality products or experiences that resonate emotionally, they will not hesitate to spend generously on their passions

Daily high-frequency consumption, achieving a sense of control through prudent calculation

Categories with a growth rate below 5% in total retail sales of social consumer goods above designated size during the first three quarters of 2025

- auto
- Beverages
- Tobacco and alcohol
- Clothing, footwear, hats, and textiles
- Cosmetics



OUR OBSERVATIONS

On the other hand, alleviating anxiety through emotional consumption and self-care

Categories with a growth rate over 15% in total retail sales of social consumer goods above designated size during the first three quarters of 2025

- Communication equipment
- Cultural and office supplies
- Furniture
- Sports and entertainment goods

Lavishly spending on "Pain Gold"



Lao Fengxiang's limited-edition 《Honkai: Star Rail》 co-branded gold bills sold out swiftly upon release. This gold note weighs 1 gram, originally priced at 899 yuan each, and has been speculated to nearly 1,600 yuan on second-hand platforms.

"Suchao"



From May to November, 85 matches attracted 2.433 million onsite spectators, averaging nearly 28,600 per game.

Dopamine shopping, fulfilling a sense of happiness.



The lifestyle brand [Tagi], FOCUS on dopamine-style design. Has won the favor of young people.

IMPLICATIONS



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#1 Position the product as a fusion of practicality, quality, and emotional value, thereby creating a value loop from functional trust to emotional reliance.

Firstly, the product effectively addresses the consumer's specific pain points and builds trust through high quality. On this basis, by delivering perceivable Long-Term Value (such as durability and service commitments), Consumers perceive it as truly worthwhile. Ultimately, providing emotional value tailored to distinct emotional needs: for daily fatigue, creating small delights through dopamine-driven design or nostalgic elements; for mental stress, offering light relief via meme culture; and for loneliness, fostering companionship through concepts like pets or "partners".

#2 With a spirit of enjoying life at its core, integrate the brand proposition into a lifestyle.

Converting the abstract notion of enjoying life into a distinctive lifestyle for the Brand. For example, a health food Brand might advocate the philosophy of "daily light nourishment", encouraging a five-minute daily healthy intake to recharge energy for the day. Household products can introduce the concept of "ordered breathing", fostering a sense of inner order through the spatial arrangement of the home environment. Design accessible activities that infuse product usage with a ritualistic quality, transforming it into an expression of lifestyle. This enables the brand to transcend the product itself, becoming a "guide" and "partner" for consumers in their pursuit of an ideal life.

POINT OF VIEW



SHESPORTS ECONOMY

Female consumers are increasingly engaged in mass sports events such as road running and tennis, showcasing vitality, pushing their limits, and enjoying personal growth on the field. This reflects not only rapid growth in female sports consumption but also a profound evolution in lifestyle attitudes and value propositions.

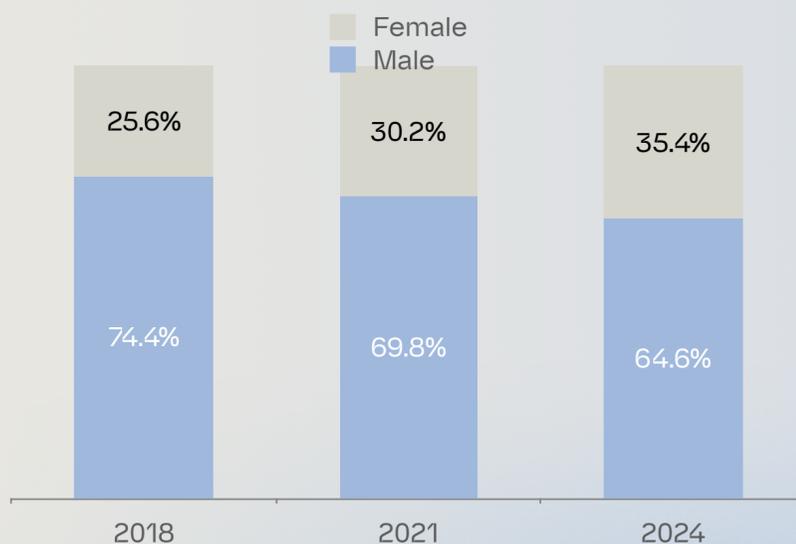
The reason behind: women's demand for sports has evolved beyond health and body shaping; they now seek to achieve "self-empowerment" through sports, enhancing confidence, strengthening bodily control, and regarding it as evidence of personal growth. Tangible progress, such as completing sports events and mastering new skills, not only provides immediate feedback but also resonates with their psychological pursuit of "lifelong growth", becoming a means to confront life's challenges.

2026

Among female consumers, a sports trend centered on "active participation, immersive experience, and self-actualization" will continue to deepen. Women will gradually evolve from being participants in mass sports events to becoming key definers and drivers of the sports landscape. For them, sports have long transcended the purpose of physical exercise and have become a new fashion language for self-expression, community connection, and attitude demonstration

Female are increasingly active participants in mass sports events.

Gender distribution trends among participants in China's road running sports events



My first full marathon: 42.2 km. Completing my first marathon—I truly did it. This is the birthday gift I give myself to mark Establishing Oneself at Thirty. From this moment on, I am stronger, more fearless, and more passionate about life!

—Red user @fifiXueFeiE, female, SH



#Trail Running Girls

social buzz: 6.55 million
Year-on-year growth of 110%
(January 1, 2025 – December 24, 2025 vs. the same period last year)

#Vitality-inspired Outfits

Views exceed 86 million on social media
(As of 2025.12.26)

Challenging "softness", with increased participation in sports emphasizing strength, driving new aesthetic trends

- Combat sports (such as boxing and judo): Female consumer participation rose from 5% in 2024 to 10% in 2025
- Swimming: Female consumer participation increased from 23% in 2024 to 30% in 2025

OUR OBSERVATIONS

Female sports celebrities have become premier commercial endorsers.

More and more brands are recognizing the immense potential of "She power" and are selecting outstanding female athletes as endorsers. Leveraging their influence, these brands engage female consumers in a more authentic, impactful, and dynamic manner, conveying a brand spirit of independence, confidence, and resilience.



Zheng Qinwen



Quan Hongchan

IMPLICATIONS



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#1 From the female perspective, product design addresses the overlooked needs of active women

For sports footwear and fashion brands, regarding product functionality, conduct in-depth research on women's exercise needs during special physiological periods such as menstruation and postpartum, to develop products featuring specialized care functions. In terms of scenarios, products should support seamless transitions from sports to Life Scenarios. A series designed with a fashionable appearance, professional performance, and seamless wear, catering to female consumers' composite needs of "always mobile, always beautiful."

#2 Leverage exclusive communities to build long-term connections by combining online interactions with offline sports events, creating an "energy field" that fosters brand belonging.

In the context of increasing female consumer participation in sports and sports events, diverse communities are vital channels for them to connect with peers and pursue role models, as well as key media touchpoints. Brands can develop and manage communities; for example, by creating exclusive online communities for "Trail Running Girls", regularly providing professional content (such as training guidance and equipment reviews), with community KOCs leading the discussions. Offline, host exclusive boutique sports events for communities, deeply integrating brand philosophy with race aesthetics, medal design, and event apparel. Through carefully crafted event experiences, enhance the brand's sense of belonging.

POINT OF VIEW



MOOD GEISTING

Emotional value forms the basis for connections between brands and consumers. However, as it gained more consumer attention in 2025 and became part of their vernacular, it gradually turned into an ineffective marketing label—when brands use it as a broad slogan applied indiscriminately, the term loses its precise meaning and no longer resonates with anyone.

2026

Next, the competition of marketing will no longer be about simply having emotional value, but about the precision and exclusivity of that emotion.

The high maturity of the supply chain has resulted in convergence of fundamental product experiences; emotion will become the critical differentiating factor to break the deadlock. Successful brands will no longer vaguely discuss emotions but will instead anchor themselves in a specific, unique, and immersive emotion to build differentiation around it.

EMOTIONAL VALUE

Buzz volume on social media (2025full year)

7,238,280

+87% YOY GROWTH

THE SOCIAL MEDIA BUZZ LEVEL AROUND THIS TREND

1M

NICHE

EMERGENCE

MAINSTREAM

10M



Being indiscriminately favored

Brands break conventions and spare no effort to assist consumers in distress, enabling them to experience unexpected surprises and unique care. Case – Holiland's "Cake Emergency Room" service has repaired cakes from all brands for free for thirty years. This is not a short-term marketing effort but a long-term commitment, transforming the brand from a dessert merchant into a "guardian of important moments."

OUR OBSERVATIONS



Local pride

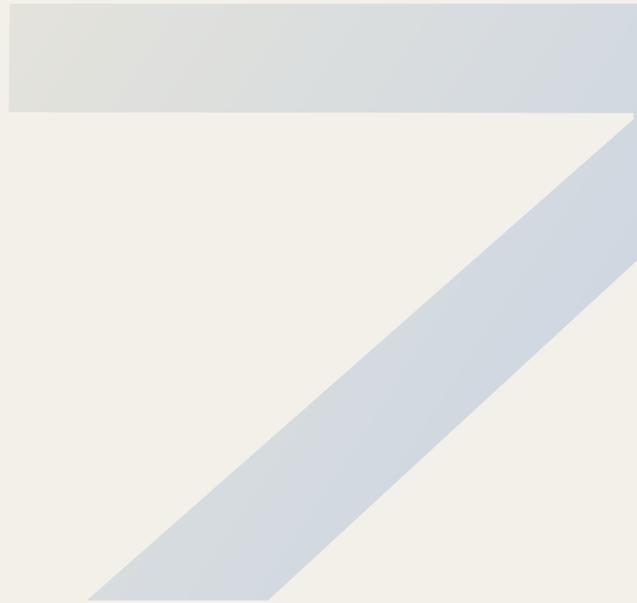
Brands discover and reshape unique local cultural symbols, evoking cultural pride and identity among local communities through contemporary expression, allowing users to experience a valued sense of pride and cultural participation. Case Study – TBWA x Yangzhou Municipal Administration of Culture and Tourism: The "Back tapping" project successfully elevated the folk art of "back tapping" into a city cultural symbol, transforming a routine service into art and endowing it with refined aesthetics and contemporary value.



"Respect" is the foundational attitude of the brand

With a sincere attitude, the brand honors the value of every ordinary individual, thereby strengthening the emotional connection with its audiences. Case Study – NIKE: A netizen's mother made a backpack featuring the NIKE logo. Nike chose not to pursue copyright infringement but rather respected this creation born of maternal love, elevating its value to a stature comparable to the brand itself, conveying the message that "the meaning you give it is equally precious."

IMPLICATIONS



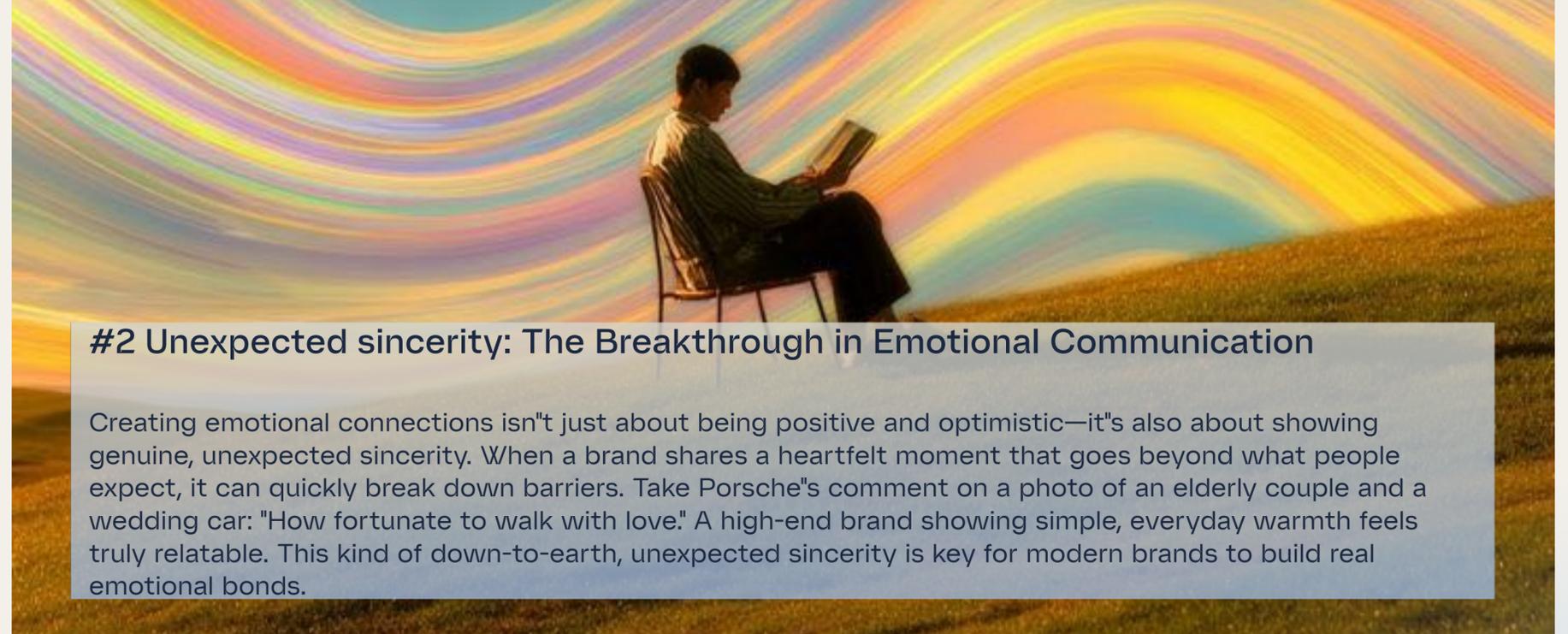
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#1 Conveying Positive and Calm Emotions: The Communication Tone for 2026

After the pandemic, consumer psychology has undergone fluctuations — shifting from brief release to cautious observation. However, we have observed an emerging collective desire oriented towards positive sentiment. As demonstrated by the applause earned by the China Men's Basketball Team in adversity: people increasingly value inspiration, hope, and a positive narrative. Brand communication should align accordingly: conveying warmth, certainty, and a forward-looking strength — in uncertain times, brands can serve as a beacon.



#2 Unexpected sincerity: The Breakthrough in Emotional Communication

Creating emotional connections isn't just about being positive and optimistic—it's also about showing genuine, unexpected sincerity. When a brand shares a heartfelt moment that goes beyond what people expect, it can quickly break down barriers. Take Porsche's comment on a photo of an elderly couple and a wedding car: "How fortunate to walk with love." A high-end brand showing simple, everyday warmth feels truly relatable. This kind of down-to-earth, unexpected sincerity is key for modern brands to build real emotional bonds.

POINT OF VIEW



STABILITY PURSUIT

Initially, in response to economic uncertainty, "Stability Pursuit" focused on material minimalism: buying fewer, higher-quality items that are timeless classics, extending the lifespan of possessions. Its meaning has deepened into a life philosophy: emphasizing that "doing one thing with focus surpasses doing many things half-heartedly." It encourages quieting the mind, cultivating depth and quality in a chosen field, and establishing a stable personal order.

2026

In pop culture, trends always emerge in pairs, rising and falling in tandem—as exemplified by the intriguing duo of "Stability Pursuit" and "Affordable Alternatives." As "long-termism" becomes a consensus, promoting classic styles or widely accepted designs faces new challenges: when more people own the same classic item, how can individuality and personal expression be presented?

STABILITY PURSUIT

BUZZ VOLUME ON SOCIAL MEDIA (2025 FULL YEAR)

2,006,593

+172% YOY GROWTH

THE SOCIAL MEDIA BUZZ LEVEL AROUND THIS TREND



Not only practical but also deserving of long-term ownership.

Consumers are placing greater emphasis on quality, favoring products that provide a sustained sense of companionship over time. Brands must, on one hand, emphasize the high quality of their products—such as unique technology and health benefits—so consumers perceive them as high-value investments; On the other hand, reinforcing identity allows consumers to feel increasingly fond of the product both functionally and emotionally.

OUR OBSERVATIONS



"I can support your mind-body well-being."

Consumers are placing greater emphasis on spiritual core stability and mind-body balance; a brand's value lies on its capacity to foster consumers' mind-body well-being and personal growth. For example, Lululemon continuously advances the "Better Together" philosophy through sports experiences, forums, exhibitions, and podcasts, assisting consumers in enhancing their physical, psychological, and social well-being.

IMPLICATIONS



Hear exclusive expert analysis and trend insights

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#1 Create space for personalized expression with classic styles.

Create "a space for expression" around the classics. It's not about changing the product, but about building experiences around it, telling stories, and inspiring each owner to interpret and recreate it in their own way. Just like adidas Originals' philosophy of "Before there are a thousand, there is The Original"—the product remains the same, but the echoes can be unique to each person. Turn the classic into the starting point for creating new classics.

#2 Utilizing Long-Term Value to develop brand and product narrative.

Consumers are becoming more discerning and patient in evaluating value. Brands need to provide compelling long-term reasons to engage them. For classic brands, history is a key asset. Uncovering and sharing their technical details, origin stories, and generational craftsmanship can build trust. For emerging brands, clearly outlining a future path is crucial. This involves continuous innovation, visible progress, and a steadfast commitment to core values. Empowering consumers to see and support this journey is essential for long-term success.

POINT OF VIEW



MATURITY PARADOX

Traditionally, age appeared to be closely linked to specific behavioral patterns. Whether it is "standing on one's own at 30", free from confusion at 40, or "just thirty", "career crisis at 35", or "retirement life"...

However, we observe that growing up has become a paradox: age no longer defines "what one should do at a certain age." Consumers are increasingly crossing generational boundaries, with "generation gaps" dissolving within shared interest circles, bridging psychological, interest, and attitudinal differences.

2026

With shifts in demographic structure, a prominent trend is that individuals are proactively extending their life stages, rejecting the constraints of the traditional timeline dictating what one should do at a certain age. The term "Kidult" does not signify disengagement; instead, it reflects a deeper message. It shows a greater focus on personal needs and inner happiness, freely blending adult and childlike experiences. This approach is becoming the new norm.

MATURITY PARADOX

BUZZ VOLUME ON SOCIAL MEDIA (2025 FULL YEAR)

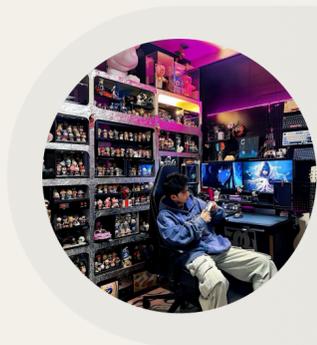
1,411,055

+30% YOY GROWTH

THE SOCIAL MEDIA BUZZ LEVEL AROUND THIS TREND



OUR OBSERVATIONS



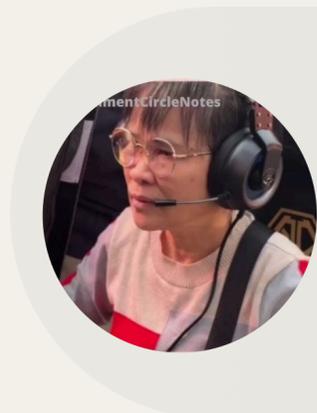
The pleasure of adulthood lies in defining the rhythm of one's own growth.

Today, age labels such as "8+" and "16+" emphasize the "+" rather than the chronological number of years. Adults have redefined its meaning—it signifies autonomy and the delight of extension. Among Pop Mart customers aged 30 to 40, 75% are high-frequency repeat purchasers. Players aged over 30 account for 41% of "Genshin Impact" users and 75.5% of "Honor of Kings" users. This "childlike" consumption is emerging as a new lifestyle trend.



Things from childhood remain the most enjoyable.

Nostalgia has become the new language of consumption. For the core consumer cohorts of the 1980s and 1990s, childhood symbols serve as "keys" to unlocking memories, and they are willing to pay for such experiences. In 2023, the nostalgia economy surpassed 480 billion yuan, with the 30–45 age group contributing 61%, of whom 74% are willing to pay a premium for sentimental value.



The "Gaming Life" of the Silver-Haired Population

"Elementary school teammates" are a thing of the past; today, the opponent you face could be a grandfather or grandmother. Age is no longer a barrier in gaming. Esports chairs have become their new "rocking chairs", while mechanical keyboards are tapping out the "Cyber Pension." Data indicates that esports peripheral consumption among those over 50 has surged by more than 240%. For Silver-Haired Gamers, twenty years of gameplay qualifies them as veterans — their esports journey is truly just beginning.

IMPLICATIONS



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#1 Awakening the playful spirit beyond Children's Day

As major brands increasingly approach adults during Children's Day, a new marketing paradigm has emerged. True insight lies in recognizing that childhood memories are composed of countless specific moments—the first adventure, a discovery on a summer night, the joy of receiving a cherished item. Brands must ask themselves: With which unique childhood moment can our products and narratives create a meaningful resonance? We recommend identifying the "moment" that is uniquely yours, enabling the childlike spirit to be awakened every day. This transcends festival marketing and establishes a continuous emotional connection.

#2 Trendy Silver-Haired Demographic: An Unmissable "Early Bird" Group

In 2025, esports teams in nursing homes reshaped our understanding of the endearing silver-haired population. Better life security and the widespread adoption of internet surfing are rapidly narrowing intergenerational values and the lifestyle generation gap. In certain popular trends, the Silver-Haired Population may actually be the earliest "early birds"—their "wealthy and leisurely" status supports their engagement, while "sustained curiosity" fuels their vitality. When a brand identifies these endearing consumers within the community, it should consider how to wholeheartedly embrace and amplify their demonstration effect. They are not only a new demographic but also the most compelling witnesses in the brand revitalization narrative.

POINT OF VIEW



NEO-COLLECTIVISM IN FOOTBALL

Individuality takes precedence, and collectivism are not binary opposites—people actively seek a sense of belonging and value resonance within small groups. Football, as the world's leading sport, inherently carries the dual appeal of uniting collective emotions while highlighting individual characteristics. Brands need not only to deepen the emotional connection with long-time fans but also actively explore ways to make those unfamiliar with football fall in love with the sport.

2026

In the 2026 World Cup year, China's football audience will no longer consist solely of viewers of top-tier events but will become more diverse, reflecting a broader cultural engagement with the sport. From cheering on their home teams out of local pride, to fashion fans driven by "BLOKECORE", to being moved by the authentic stories behind football.

FOOTBALL CULTURE

BUZZ VOLUME ON SOCIAL MEDIA (2025 FULL YEAR)

146,100

+21% YOY GROWTH

THE SOCIAL MEDIA BUZZ LEVEL AROUND THIS TREND



OUR OBSERVATIONS



We are entering an intensive period of sports events.

From the concluded FIFA Club World Cup and the ongoing Europe's Big Five leagues, to the 2026 Men's FIFA World Cup, the 2027 Women's FIFA World Cup, and other international competitions, as well as the continuously intensifying "Suchao" and domestic school football leagues — football fever will continue to surge.



Inspire more people unfamiliar with football to fall in love with the sport

China boasts a vast fan base, yet the growth of new fans faces challenges: over 80% of spectators at the 2022 World Cup had more than five years of viewing experience, and the increasing variety of entertainment options has slowed new audience growth. Therefore, during a major football year, brands should not only engage long-standing fans but also attract those previously indifferent to football. The absence of a world-class national team does not hinder people from enjoying the sport. The rise of "Suchao" serves as evidence—many friends who never watched football before have begun discussing sports events. While achievements and star players are undeniably appealing, they are not prerequisites for a passion for football.

IMPLICATIONS

10

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#1 Entertainment First

The 2026 FIFA World Cup returns to North America—a market with a highly developed entertainment gene and pop culture. Looking back at the 1994 USA World Cup, it was not merely a sports event but a powerful catalyst for the globalization of American rap and Hollywood blockbusters. Although we cannot predict the exact cultural symbols that 2026 will bring, it is certain that this will be far more than a major sporting event; it will be a grand cultural celebration integrating sports, entertainment, and trends. Brands need to prepare not only a marketing contingency plan but also a cultural system to capture and integrate into this celebration.

#2 Viewing the Orientation of Welcoming Newcomers from a Cultural Perspective

The 2026 FIFA World Cup, besides the emotional intensity of many legendary superstars' "final dance", also presents opportunities to stimulate pan-sport consumption groups. The key lies in leveraging the cultural intersections—for example, the spread of theme song melodies, the visual symbols of national colors, and the secondary creation of internet memes... These "byproducts" of sports events often permeate everyday public life earlier and more broadly than the matches themselves. If brands can establish connections through these cultural touchpoints, they will be able to secure their own entrance amid the event celebrations.

POINT OF VIEW

CHINA MAR-COMMS TRENDS

HUMAN-MACHINE COLLABORATION RISES, HUMANITY STAYS CENTRAL

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