Connecting the dots

5 major marketing trends for 2026 *you can't afford to overlook*

GWI.

Contents

Notes on methodology

All figures in this report are drawn from:

- **GWI Core** - our continuous online research among individuals aged 16-64 (or 16+) in 54 markets worldwide
- **GWI USA** - our continuous online research among 80,000 Americans annually aged 16+
- **GWI Kids** - our annual online research among 20,000 children aged 8-15 in 18 markets.
- **GWI's bespoke research** among 550 advertising and marketing professionals in the US, conducted August-September 2025.
- **GWI Zeitgeist** – our monthly topical survey fielded in 11 markets. Our World Cup insights were captured through this in September 2025.

For our GWI Core data set, we speak to over 1 million individuals annually. Where relevant to their interests / behaviors, Core participants will be invited to take part in further studies about specific topics: GWI Alcohol, GWI Automotive, GWI Consumer Tech, GWI Gaming, GWI Luxury, GWI Moments, GWI Sport, GWI Travel, and GWI Work. We also invite participants in select countries to complete GWI Zeitgeist - a monthly deep-dive into topical themes.

Throughout this report, we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average.

Introduction

JASON MANDER
CHIEF INSIGHT OFFICER, GWI

2026 is nearly upon us, and odds are your marketing and advertising plans are mostly firmed up. Your focus is probably squarely on a few key things too; AI and hyper-personalization, short-form video, and authentic, community-driven marketing to name but a few. But what are you missing?

This report highlights the big trends that aren't so obvious – the ones your strategy might be overlooking, because the best insights require some digging to uncover. Leveraging a wealth of research tapping into over 2M+ annual surveys, including new original research on key markets and audiences, here's our take on the big 2026 trends you might be overlooking.

01

AI is taking the marketing industry by storm - but it’s making insights **generic** and **stereotypical**

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AI isn't a strategy, a workflow or a finished creative idea— it's a tool. And like any tool, it's only as strong as the human talent steering it and the data it was trained on. When either of those inputs is flawed, the output won't just be wrong, it will be wrong at scale. That's why human oversight isn't a safeguard; it's the entire point. The real opportunity is in pairing machine intelligence with human creativity, judgment, and governance so the work becomes not only faster, but sharper, safer, and more meaningful.

Ask our customers

razorfish

Cristina Lawrence
Chief Social & Innovation Officer, Razorfish

If you're reading this article, chances are you've already adopted AI tools within your workflows: 84% of the advertisers and marketers we recently surveyed in the US said they were using AI professionally. ChatGPT topped the table, with Gemini and Copilot in close pursuit.

Sure, there are some laggards. The smallest companies are furthest behind, as are C-level execs and older professionals. Their objections - centering around lack of expertise, privacy, or trust - will all be overcome, and before too long we can reasonably expect adoption to hover around 100%.

In the world of consumer insights, AI tools offer transformative promise. We know that advertisers and marketers place considerable value on the importance of insights. We can also see that those using consumer insights in decision-making report materially higher levels of satisfaction with the outcomes. But despite this, 1 in 2 business decisions are still being made without any input from consumer insights.

Why? Friction gets in the way. Think about traditional ways to access insights, and we can all picture scenarios where data isn't available, insights take too long, or it's too difficult to distill the overwhelming amount of data available. As a result, professionals are most likely to default to their own experience and intuition in order to make decisions (not a bad input to draw upon, by any means, but not always the most data-driven one).

Big on insight, small on action: the size of the gap

% of US advertisers & marketers who say consumer insights are somewhat/very important for the following vs the % who use them often, almost always, or always (i.e. 51%-100% of the time)

But AI tools can change the game here - and in fact, they already are. Our research shows they're now the third most used input for decision-making, having leapfrogged much longer-established inputs like whitepapers, social media listening, or consumer data platforms.

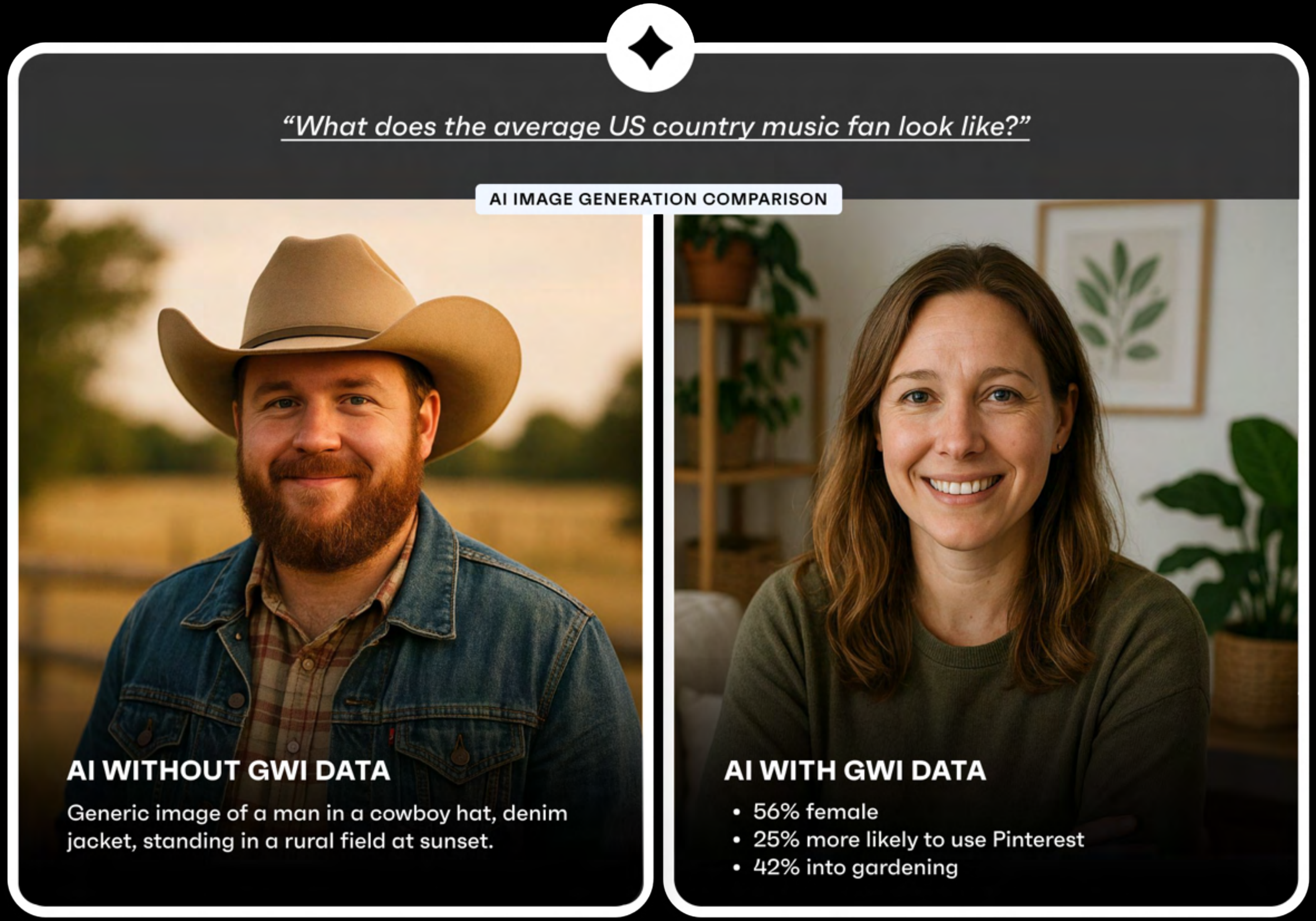
We like AI tools because they're quick, they're easy to use and access, and they understand the context of what we're trying to do and deliver results accordingly. And in many cases, they produce insights which appear good enough.

Here's the challenge, though: insights are only as good as the data they're based on, and most AI tools will only have access to data available on the open web.

Scratch the surface of this, and you'll quickly find that a lot of that data is old, inconsistent, biased, unsegmented, and static. You'll find tools drawing upon press releases, government files, one-off free reports, and snapshots of data from research companies which aren't behind paywalls. You'll find your target audience defined differently across them, as well as insights from various moments in time being conflated to represent the here-and-now.

Worse still, you may find your insights are becoming stereotypical or bland. While some of the best ideas come from unexpected or surprising insights, AI tools are striving to find the most expected, logical, and mainstream answers.

How does this show up? It's a default towards audiences which are cismale, Caucasian, and middle-aged. It's a media plan which recommends every single traditional and digital channel out there. It's "insights" like Gen Z caring about the environment and TikTok.



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AI is extraordinary at surfacing anomalies - the moments where the math and the motivation don’t match. But identifying the outlier is only half the story; understanding why it happened still requires human curiosity, intuition, and judgment. When we combine AI’s speed with our ability to decode the underlying tension, we can see where momentum breaks, and begin to rekindle it.

Ask our customers

Accenture Song

Jackie Mockridge Mattina
Head of Insights and Planning,
Accenture Song

As AI has exploded, what's perhaps gotten a little lost is recognition that AI is only as good as the data it's drawing from.

In the earliest stages, frankly we were happy enough with the capabilities that we didn't necessarily scrutinize the data. We hoped AI would make things faster, more seamless, more productive - and it did. And back then, trying to integrate new data sources into an AI agent was a highly bespoke and cumbersome affair - exactly the type of friction that makes us run for the hills.

The release of the Model Context Protocol - or MCP - has changed those parameters beyond recognition. Data can be connected to pretty much any agent (ChatGPT, Gemini, Copilot, Claude, internal tools, etc.) and/or be integrated within the tools we're using as part of our workflows (CRM platforms, analysis tools, etc.). It's the magic formula for insights: an agent doing the heavy lifting, drawing from a robust data source in order to dynamically generate insights based on accurate audience definitions and the most up-to-date data.

It's not just the insights that are transformed as a result. Advertisers and marketers who are already using AI for market research recognize the predictable benefits around speed, quality, and productivity, but they're also significantly more likely to see advantages such as better team alignment (+71%), deeper customer understanding (+55%), and unexpected insights (+58%). Such benefits point to a structural shift, not just a speed-up.

AI users see the bigger picture

How much more likely workers who use AI for market research/analysis are to cite the following as benefits to using an AI agent, compared to other US professionals

	%
Better alignment/collaboration between teams	71
Unexpected or innovative insights	58
Deeper customer understanding	55
Reduced reliance on external vendors	54
Ability to test more ideas/strategies in less time	36

The real value of AI plugged into structured, reliable data isn't faster answers, but better, more autonomous decision-making at scale.

Ask our customers

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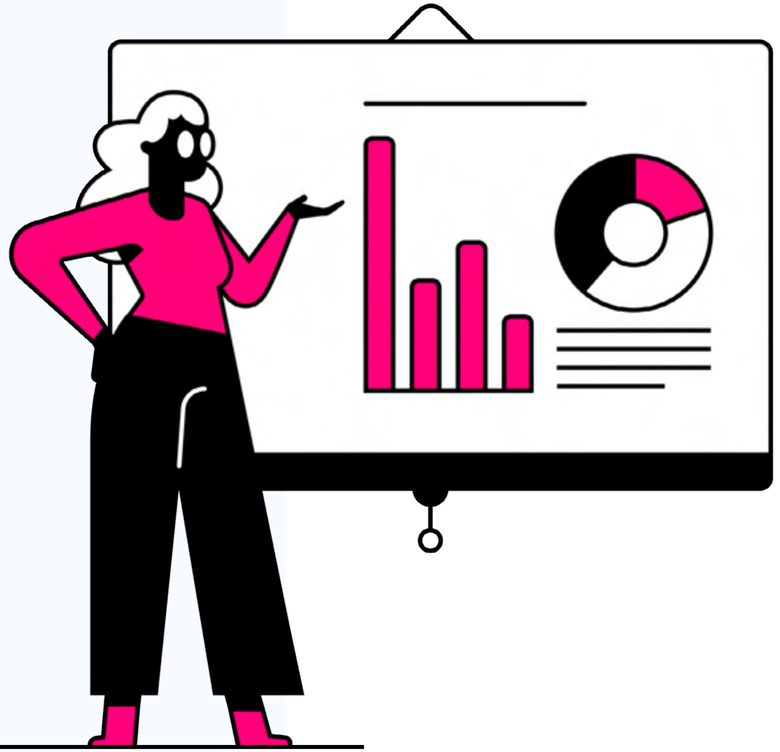
This is a classic case of exponentials, where we are underestimating how rapidly AI will move from generic to truly insightful. The promise of AI is its ability to identify insights humans overlook because they don’t fit the narrative in our heads. The intuition we seek in our strategists is just another data source, which if taught to your company’s AI could be your competitive advantage.

Rob Gaige
Global Head of Insights, Reddit

What this means for 2026 planning

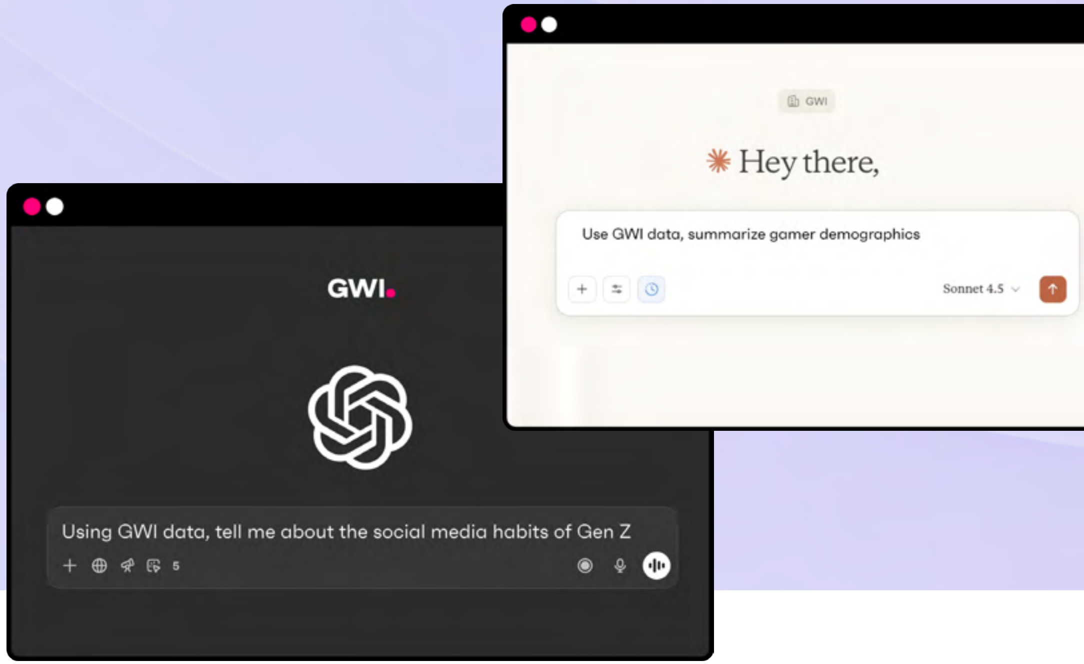
Like your AI agents, your strategy is only as good as the data that feeds it. Odds are, with more pressure to act fast, we're going to be seeing a lot more generic and stereotypical insights being used to craft media plans and content strategies across 2026 as AI becomes even more central to the way we work. That means there's opportunity for those marketers and advertisers looking to really focus in and hone their targeting. By plugging reliable consumer insights directly into your AI tools, you can easily make that shift. Use AI to your advantage – not just for speed, but to optimize spend across the board.



Want the full story?

This is just a taste of what the research is telling us. Download the full white paper unpacking why agentic AI is the future of consumer insights.

Get the white paper



02

More consumers are contradicting themselves – there’s a big gap (and opportunity) between **intent** and **behavior**

Humans are many things. We're surprising. We're messy. We're complicated. And, more often than you think, we're contradictory: we say one thing, but do another.

We say we care about the environment but then make purchases that don't align with that. We express privacy concerns but happily hand over data in order to use services for free.

For advertisers and marketers, the gap between our views and behaviors is ripe with opportunity. Because even if our words and actions don't match, the underlying sentiments and aspirations are still very powerful.

Finding consumer paradoxes used to be hard work - analysts would have to spend hours or days searching the data, testing hypotheses about where contradictions might emerge. But in the AI agent era, this process can be fast-tracked at a lightning pace.

We asked an AI agent to examine the entire GWI data set (millions of people responding to hundreds of different questions), and find the places where there were mismatches between expressed intent and actual behavior. In just 90 seconds, it created a ranked index.

One thing it highlighted was around impulse vs planned purchases, which many tend to associate with smaller vs bigger-ticket items respectively. By association, we strategize about how to best influence and maximize conversions in the planned purchase funnel. And we think about the best in-the-moment methods to trigger spontaneous purchases for smaller items.

Ultimately, many current marketing practices treat intent as a visible, declared signal (e.g. clicks, search behavior, and basket activity), while framing impulse as an invisible and unpredictable whim. But what if this distinction isn't as clear as we once thought and our strategies are outdated?

Of course, there is a distinction between planned and impulse purchases. Across the 60 big-ticket major purchase items we track - from cars to espresso machines to sofas - we see significant levels of research taking place. Meanwhile, more than half of consumers are impulse purchasing online at least once a month (let alone in-store). And the self-reported triggers for impulse purchasing are largely as expected: taking advantage of sales/deals, treating oneself, trying something new, and liking the look of the item.

Nevertheless, notable numbers report impulse purchases in relatively complex, high-stakes categories: 1 in 5 globally in tech, and 1 in 10 in travel. These aren't majorities, but scaled to global populations, they represent billions of consumers, and they challenge the idea that impulse is purely a low-stakes behavior.

Among people who say they're "always impulsive" when buying luxury, for example, half of them say they already have a specific product in mind. For many, having a product or brand in mind doesn't count as "planning," but can co-exist as impulsive.

What we call "impulse" often reflects the activation of latent desire, not the spontaneous generation of it.

Impulse or intention? The blurred line in luxury buying

% of luxury buyers in 5 markets who say their luxury buying is...

...who also say they...

%	Usually have a specific item in mind	Don't usually have a specific item in mind
1 - Always impulsive	50	33
2	49	42
3	50	36
4	61	27
5 - Always planned	60	24

We see a related pattern in more functional, big-ticket categories like auto. While many car purchases are triggered by needs-based events - such as a job change or vehicle breakdown - our data shows consumers who buy quickly (within two weeks) consider just as many brands on average as those who take several months or even over a year. This implies that even when the purchase moment feels urgent or reactive, many buyers are still drawing on a reservoir of pre-existing brand awareness and lightly-held preferences.

What appears unplanned is often the rapid activation of long-standing, low-level consideration. The language of “impulse” overlooks this nuance and risks distracting marketers from the real opportunity: being part of those ongoing, pre-trigger moments that quietly shape action.

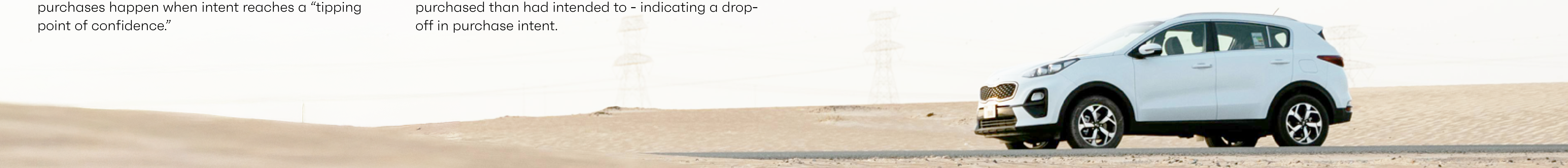
Purchase intent often builds in the background, especially for high-consideration items, and isn’t always declared. The binary between planned and impulsive falls apart when we recognize most purchases happen when intent reaches a “tipping point of confidence.”

That confidence can come from many sources: validation from others, a sense of value, social proof, or the reassurance of good timing. These triggers don’t create desire, they unlock it. Understanding how and when confidence peaks is key to understanding modern buying behavior.

It’s unlikely that distinctions between planning and impulse have ever been black-and-white. But real-world events happening right now are exacerbating the blur; uncertainty around tariffs has come hot on the heels of supply-side shocks over the last five to six years (such as chip shortages, shipping bottlenecks, factory shutdowns, and labor shortages).

To see the impact, we can track the ratio between prior intent and purchase (or in other words, the number of people who said they were in the market for something vs. the number who actually purchased within that category). A positive percentage means more people purchased from the category than had originally planned to - suggesting spontaneous or unplanned buying. A negative percentage means fewer people purchased than had intended to - indicating a drop-off in purchase intent.

Across a period of six years, from 2019 through to 2025, the ratio fluctuates significantly over time and across categories. Some have stayed positive throughout: electronics, furniture, insurance, and clothing. Others such as white goods have boomeranged – going from positive, to negative, back to positive again. Others spent a long time in the negative, before more recently flipping to positive (e.g. auto and vacations).

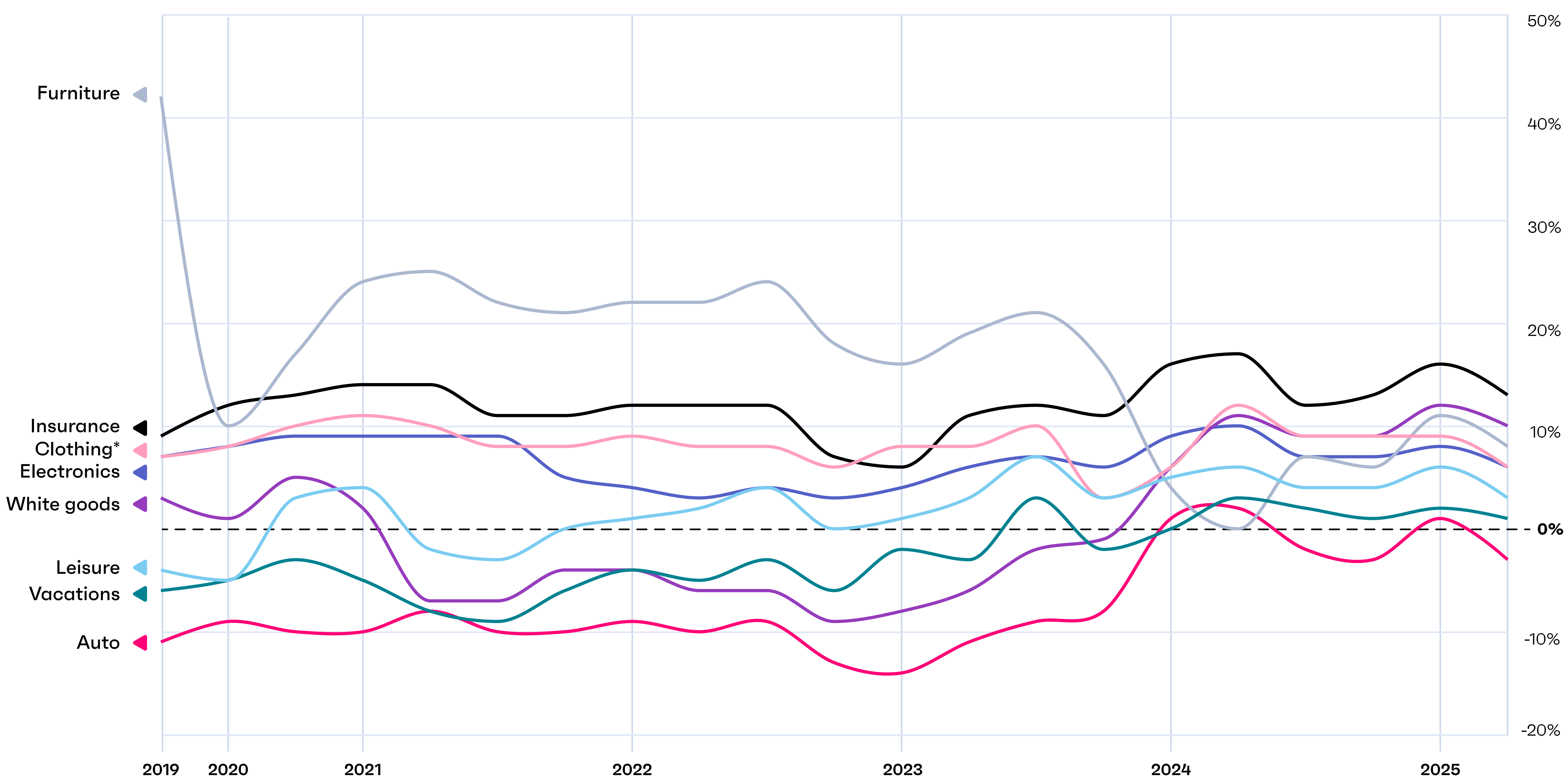


Impulse buying patterns are anything but steady

Ratio between prior intent and purchase, based on the % of global consumers who said they planned to buy the following in the next 3-6 months vs the % who ended up doing so

Above 0%: unplanned
Below 0%: lost intent

All % waves between Q4 2019 and Q2 2025



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This just shows that the instinct to create marketing moments like holiday or back to school are becoming more and more misaligned to how consumers make decisions. The reality is that demand is evergreen and impulse is incredibly personal. My advice is to act like your consumer is always in the market. You never know the individual impulse that pushes them to buy.

Ask our customers

reddit

Rob Gaige
Global Head of Insights, Reddit

There are a few learnings here. First, there are likely to be some categories where interest and emotional investment are relatively low (e.g. insurance) – something that's required, but that we might forget is coming up or purchase quite close to the renewal date.

Second, there are categories that have experienced a lot of lost intent (e.g. auto, white goods and vacations). Whether due to demand/supply constraints or friction, many people in the market for these items didn't end up purchasing.

Third, we have categories like electronics, furniture, and clothing. All of them saw more purchases than expected, suggesting latent demand was activated at the moment, likely due to redirected spend and urgency created by context. Interestingly, auto, white goods, and electronics were all affected by chip shortages, but only electronics saw a net gain in purchasing, implying it's in this category where other factors (e.g. urgency, community help, and contextual triggers) made a real difference.

So, what can we ultimately conclude from all of this? Aside from the obvious point that expressed intent doesn't correspond neatly with subsequent behavior, we can also glean more surprising and critical findings.

External events which trigger uncertainty or scarcity can have a major impact in relevant categories, causing people to redirect spend elsewhere as latent demand is activated. The time-boxed drops in categories like auto, electronics, white goods, and vacations show this in action.

In such circumstances, it's even harder than normal to distinguish planned vs. impulsive behavior, as consumers adapt their buying around scarcity, price volatility, and new lifestyle demands. Impulse can actually be the visible activation of latent intent that's been quietly building.

What this means for 2026 planning

Given today's global context, understanding this gap between intent and behavior matters more than ever. We're in the midst of unprecedented uncertainty and volatility due to tariffs. Against this backdrop, brands can't control availability - but they can control influence. That means showing up in the right communities, being validated in the right conversations, and investing in the cultural and emotional pathways that shape real-world buying decisions.

It's moving from short-term targeting to long-term trust building, recognizing the lines between impulse and planning are already blurred, and allowing latent demand to be activated at unplanned moments.

03

Social media is far from dead – it's ***the*** **dominant media** in our lives

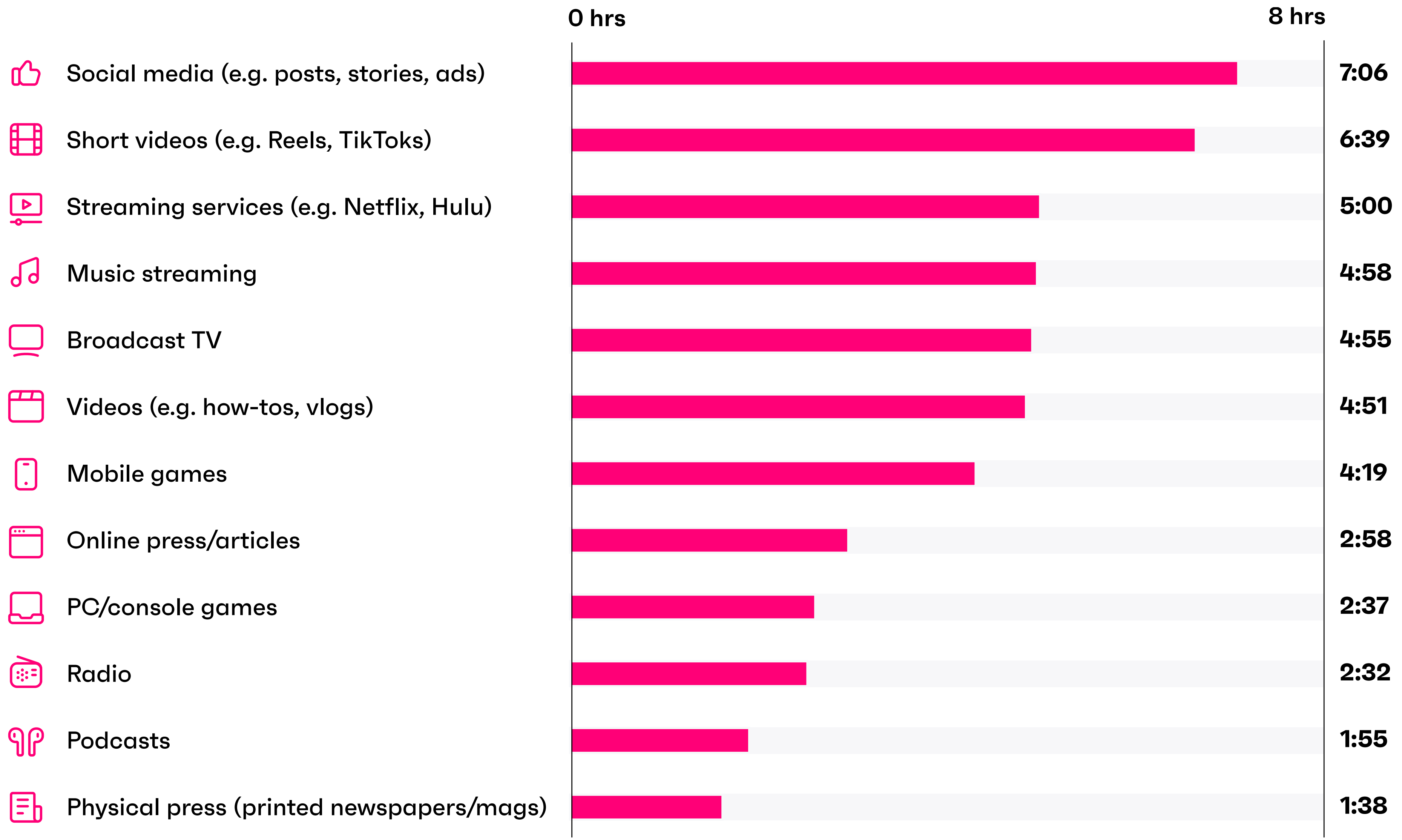
Almost every year, we hear the stories about the “death of social media.” People aren’t as into it as they used to be. They’re switching off. They’re taking a break. So the headlines go.

The truth is very different: social is still a dominant force in our lives. It’s the dominant media form, in fact. And the numbers around it are eye-watering.

Of course, defining social media isn’t straightforward - and the very fact we ask about social media as well as Reels, TikToks, and other videos gives just a glimpse of that complexity.

Social time beats TV, streaming, and radio combined

Average amount of time that global consumers estimate spending on the following media each week in h:mm



Taken alone, “classic” social media activity consumes the single biggest chunk of consumers’ time each week (over 7 hours). Combine that with time spent watching short videos, almost all of which is likely taking place via social platforms, and that figure climbs to about 13.5 hours (nearly two hours per day). Add in a share of the other video viewing - at least some of which is likely on social platforms too - and the share of eyeball time rises still more.

Put more starkly, average time spent each week on social and short videos is higher than broadcast TV, streaming services, and radio combined.

And, of course, these are the global averages. 16-24s are spending almost 18 hours on social and short videos per week. There are regional spikes too; Latam’s consumers lead the charge there, at close to 20 hours across the two. So, the next time you hear about the “death of social”, take a pause to consider these numbers.

That's not to say there aren't changing behaviors which we need to have on the radar. For example, in continuation of a trend that's been around for some time, multi-networking across platforms is flourishing. Globally, 1 in 5 consumers (and 1 in 4 Gen Z) are active on more than 10 different platforms. But associations between certain platforms and certain activities have strengthened: TikTok is the biggest go-to for entertainment and content, Facebook leads for keeping in contact with friends/family, while Instagram is the primary hub for posting photos. And so on.

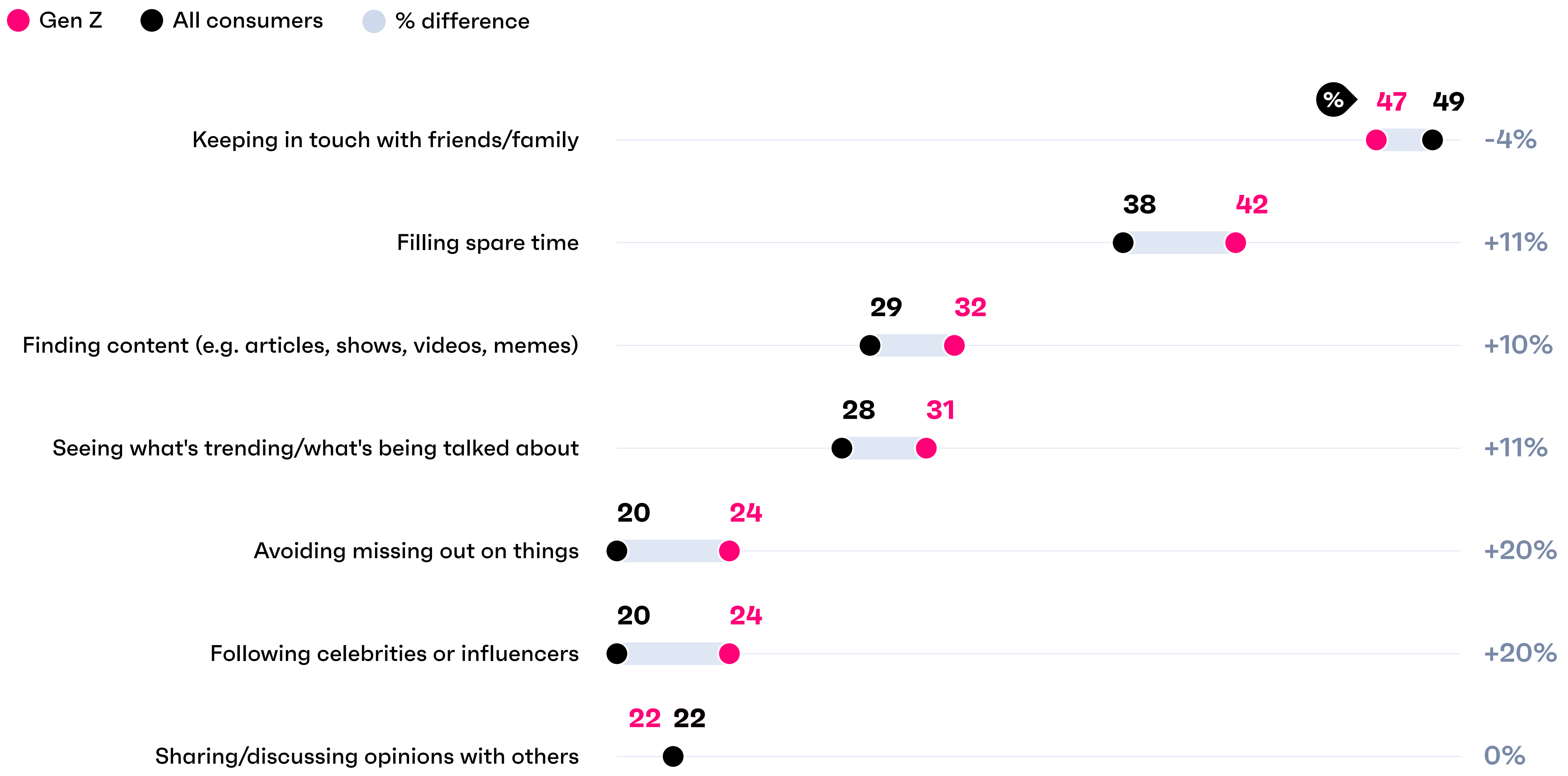
But perhaps the most noteworthy change has taken place in the reasons that people cite for spending time on social.

Top of the pile is still the original raison d'etre for social: keeping up with friends and family. A fairly close second, though - especially among Gen Z - is to fill spare time. Scrolling, browsing, or rabbit-holing is currently the second biggest reason we're there.

In fact, while the generational differences aren't as profound as we might expect, those places where Gen Z stand most apart from the rest are telling: avoiding FOMO, following influencers, seeing what's trending, finding content, and filling spare time.

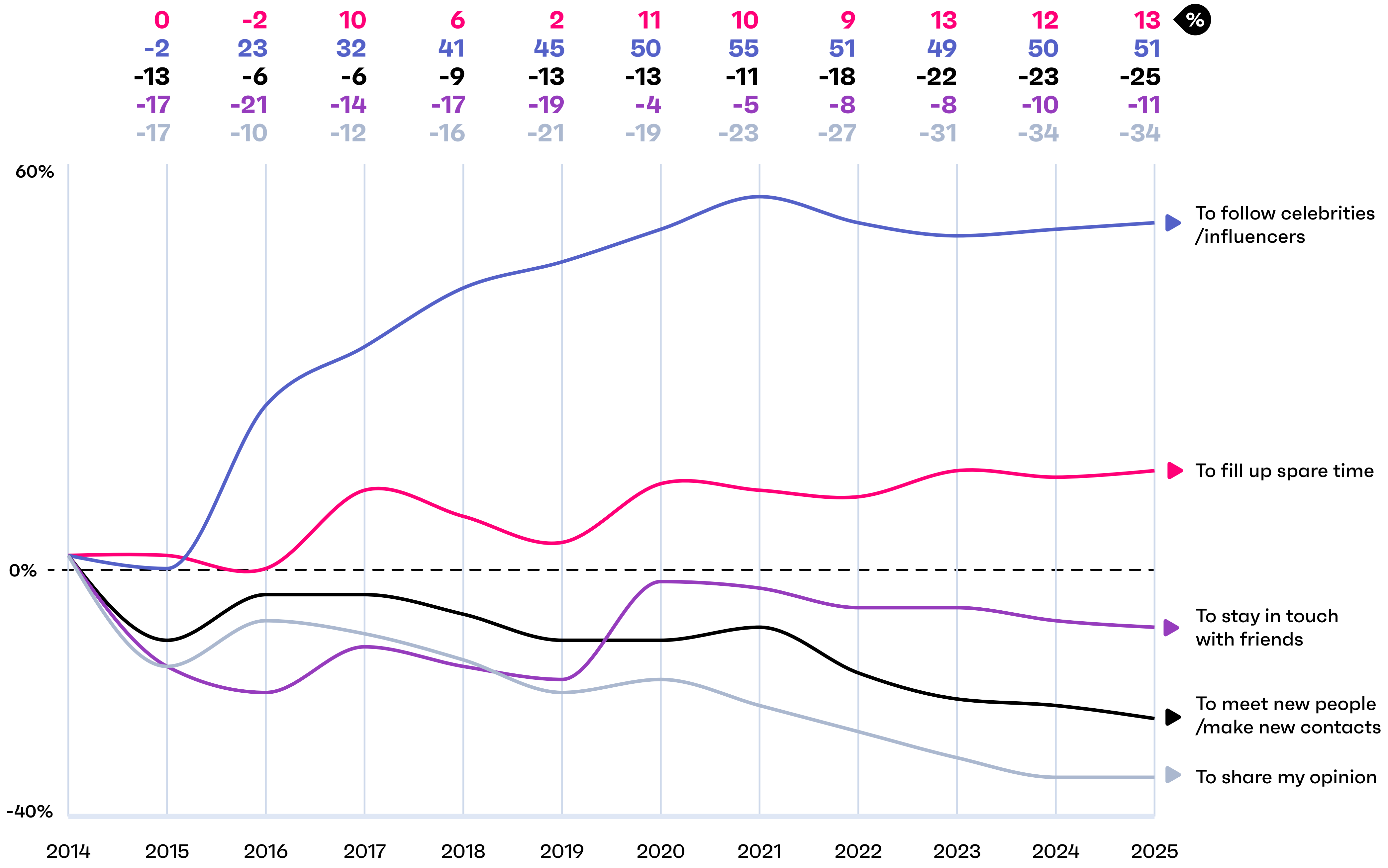
FOMO and free time: Gen Z's scroll hits different

% of global Gen Z/all consumers who say the following are their main reasons for using social platforms, and how much more/less likely Gen Z are to do so



Social media has become less social

% change in the share of consumers in Europe and North America who say the following are among their main reasons for using social media, compared to 2014



Look at this over time and the pattern of travel is clear. It can be hard to remember what early social media was like, especially given that Facebook first emerged onto the scene over 20 years ago. Most, however, would agree that it was a less curated and controlled experience, one where users posted frequently, where poking and making connections was a primary behavior, and where opinions and comments were shared relatively freely.

Though they still remain a key part of the mix for many, such behaviors have been gently declining in relative importance for some time. They've been supplemented by other reasons to be on social – many of which relate (whether directly or not) to entertainment and content.

That's not evidence that social media is in decline, or that it's facing an imminent death. And while some social commentary is prone to putting a negative spin on it (talk of "mindless scrolling", anyone?), the share of time it still commands remains impressive. And it shows no sign of receding.

What this means for 2026 planning

Yes, social media may be a little less, well, “social” than it used to be. But advertisers and marketers are ultimately chasing eyeballs and shares of attention. There’s plenty of opportunity in social media users posting less frequently and instead spending more time looking for something to captivate them. In short, the arena that is social is as strong - if not stronger - than it’s ever been, and should be a central feature in your 2026 plans.

04

The World Cup hype is serious – and 2026 fans aren’t who you think

The World Cup is arguably the biggest stage in sport, and with 2026 seeing the global soccer tournament being hosted by 16 cities across the US, Canada, and Mexico, it's bigger than ever. In 2022, over $2.4 billion global **ad spend** was linked to the World Cup tournament. In 2026, it's **projected to be even higher**. That's a lot of budget from a lot of brands. But is it a case of rinse and repeat, strategy-wise?

The fans of 2026 are markedly different from those of tournaments past. After conducting original research for our **2026 World Cup hub**, we found that they're watching differently, eating differently, and connecting with brands in a way that defies the past marketing playbooks. From gaming communities playing on and off the pitch, to those catching up through social whilst on a flight, this new generation of fans is rewriting the rules of engagement.

For brands, this means one thing. Tailoring a strategy that reaches these new, and different, fans. When every brand is spending budget chasing the same audience, standing out means deeply understanding who you're talking to - and where they really live online. In our research, we found a number of insights that can support a solid strategy. For example, when the whistle blows, true fans don't switch off - they log on.

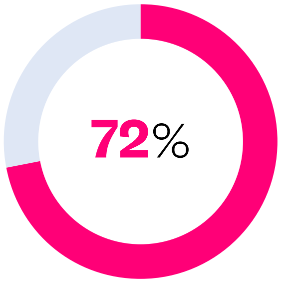
We may associate fans of the game with watching in a sports bar, or competing in Sunday League tournaments, but there's a whole - perhaps overlooked - section of fans choosing to engage in the beautiful game in a different way.

True fans are the World Cup devotees. Just over 70% of this passionate group are avid gamers, with EA Sports FC (formerly known as FIFA) topping the leaderboard. For them, the World Cup isn't just a sporting event, it's a social ecosystem. Talking tactics, trading players, and replaying the drama is a way to kick back and connect - almost half say gaming is a great way to make friends. They're also significantly more likely to spend on consoles and accessories.

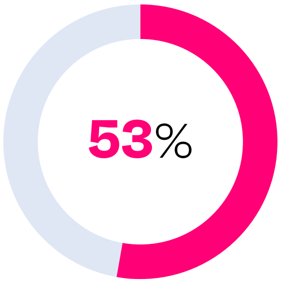
These fans aren't just kicking the virtual ball around, however. Over half also play Battle Royale games (for example, Fortnite), carrying tournament-style competition into other areas of their gaming lives. The opportunity here is clear. By extending campaigns into these environments - from in-game collaborations to branded gear - brands will be hitting the audience who want to live and play the game long after the final whistle blows.

True fans: From pitch to Playstation

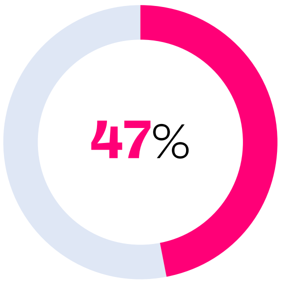
% of true fans who say the following



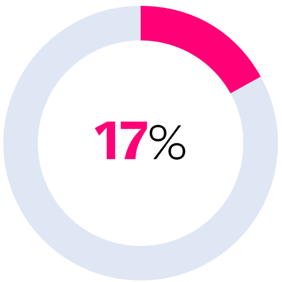
I game multiple times a week



I play Battle Royale games



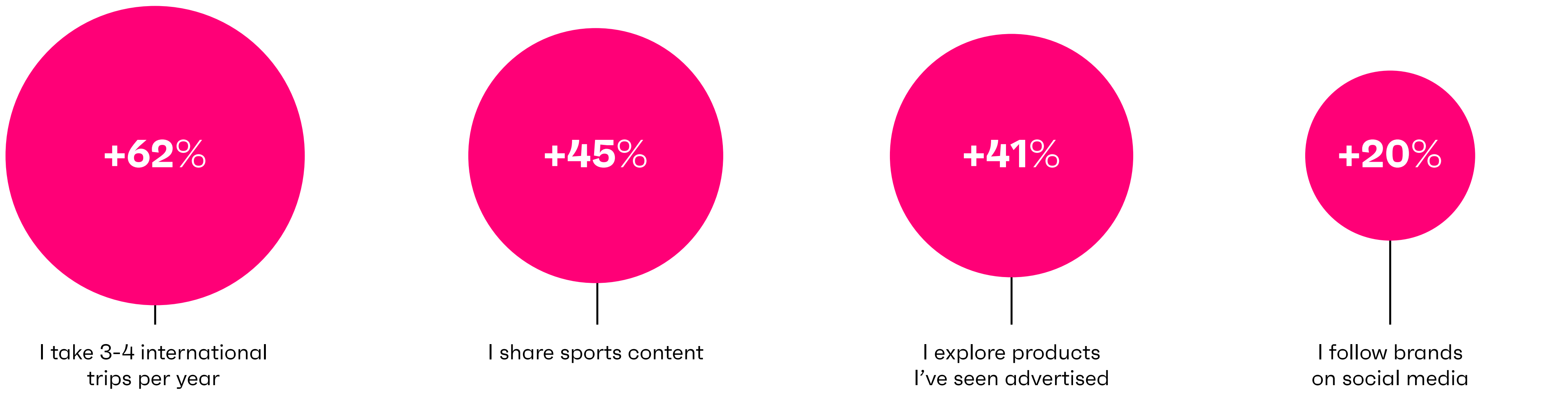
Gaming is a good way to make friends and socialize



I'd be interested in watching sports/live events in the metaverse

The virtual crowd: Always connected, always moving

How much more likely the virtual crowd are to say the following, compared to the average consumer



Let's discuss another facet of showing up virtually. The virtual crowd are on-the-go fans who choose to consume the tournament on their own schedule. They're not sitting through a whole televised broadcast, snacks in hand. They're swiping through highlight reels on mobile, catching updates via social, and switching being engaged for 90+ minutes to short, snackable bursts whilst on the move. So how does this relate to actual brand engagement?

This shift in attention doesn't mean they're less engaged, but that they're engaged differently.

For these fans, following the tournament means staying connected. This group are more likely to follow brands on social media, to share sports content, and to explore products they've seen advertised, proving that brand visibility isn't just about being on-screen, but being in-feed.

Interestingly, this group is also far more likely to take international trips, and almost twice as likely to travel to watch sport. They might catch the goals on their phone rather than a big screen, but they're still deeply connected to the culture and energy of the game.

Targeting this group through mobile-first, location-based activations - social content designed for transit moments, travel tie-ins, or geo-triggered campaigns - will meet them in motion.

Know how to score big with this year's audience.

Explore our 2026 World Cup hub for all the big insights, so you know exactly where to focus your attention (and spend).

Dive in

Reluctant fans: Chasing culture, not channels

How much more likely reluctant fans are to say the following, compared to the average consumer

+24% — I engage with foreign languages

+19% — I'm interested in other countries or cultures

+18% — While watching TV, I look up information around the content

+15% — I want brands to be eco-friendly/ socially responsible

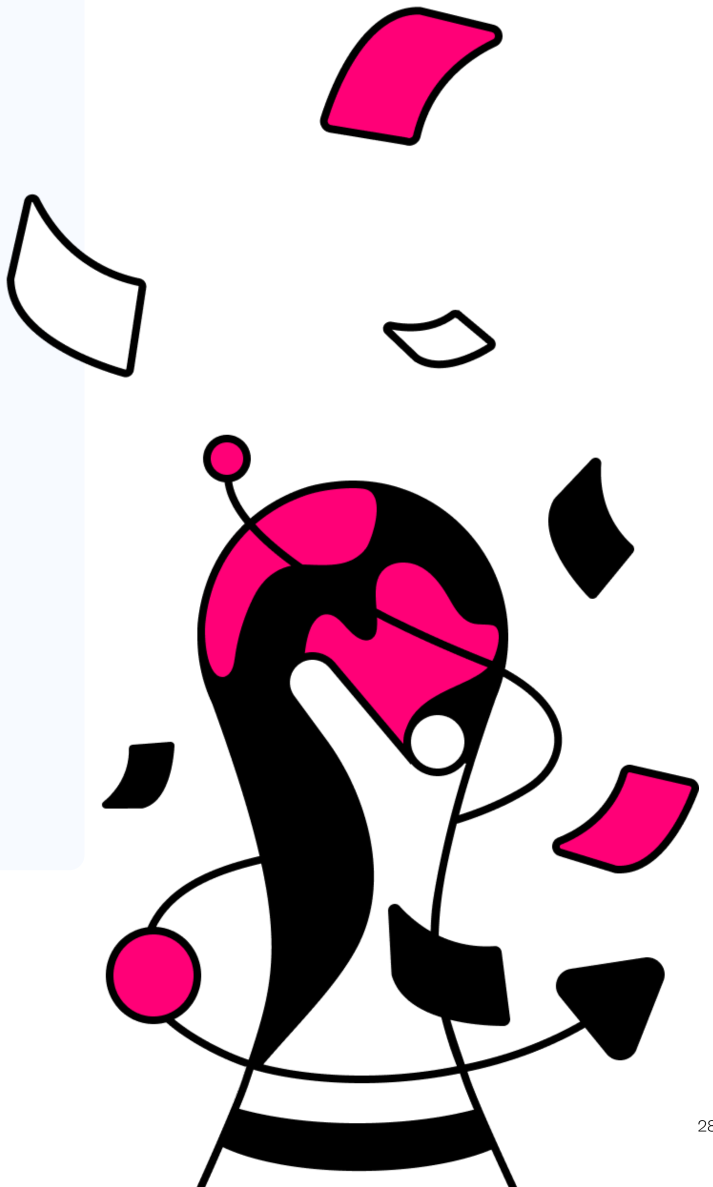
For balance, it's important to note that not everyone glued to the World Cup is a die-hard soccer fan. For many, it's a cultural event. A chance to explore the stories, cuisines, and connections that transcend the sport itself. We call consumers who fit into this group reluctant fans - culturally curious spectators who may not follow every match but embrace the World Cup as a global celebration.

Reframing campaigns around culture over competition, and positioning a brand within the global conversation (like food, fashion, sustainability, and storytelling) will resonate for this cohort far more than discussing scores and tactics.

What about sports fans who don't watch at all? Our research shows non-engagers still matter. We uncovered that 11% of consumers, and 23% in the US, are opting not to watch the World Cup. This group isn't a write-off, speaking strategically. In fact, they're loyal to sports, just not soccer. They love the NFL, NBA, and AFL, and are 14% more likely to purchase sports merchandise than average. So while brands fight for World Cup ad-break attention, there's an opportunity to reach a highly engaged group of sports fans - with spending power - locked into their usual leagues.

What this means for 2026 planning

The 2026 World Cup won't just be defined by the players on the field - for those allocating ad spend, it will be by the fans reshaping what fandom means. From gamers to globetrotters to culture lovers, fandom has fragmented into micro-communities that engage on their own terms. Reaching them means finding the uncluttered space they show up in, and meeting them there. To understand more about the untapped fandom and how to maximize budgets, read our full report on the 5 World Cup audiences worth watching.



05

Gen Alpha's turning sixteen – and it's time to take them **seriously** as a **defined generation**

Born roughly between 2010 and 2024 (albeit with exact start and end dates varying between sources), the oldest Gen Alphas will reach their sweet sixteenth birthdays in 2026.

When you ask people to describe this cohort, many paint a picture of tech-native (or tech-obsessed) kids who are comfortable and skilled at moving between online and IRL situations.

You might also hear they're environmentalists, they're all aspiring creators, and they have short attention spans.

If that sounds familiar, it's because it's highly reminiscent of how Gen Z are characterized. And that's the thing: many advertisers and marketers consider Gen Alphas as mini versions of Gen Z.

But are Gen Alpha really following directly in their predecessors' footsteps, or are we falling into the common pitfall of generational marketing and letting assumptions infiltrate our thinking?

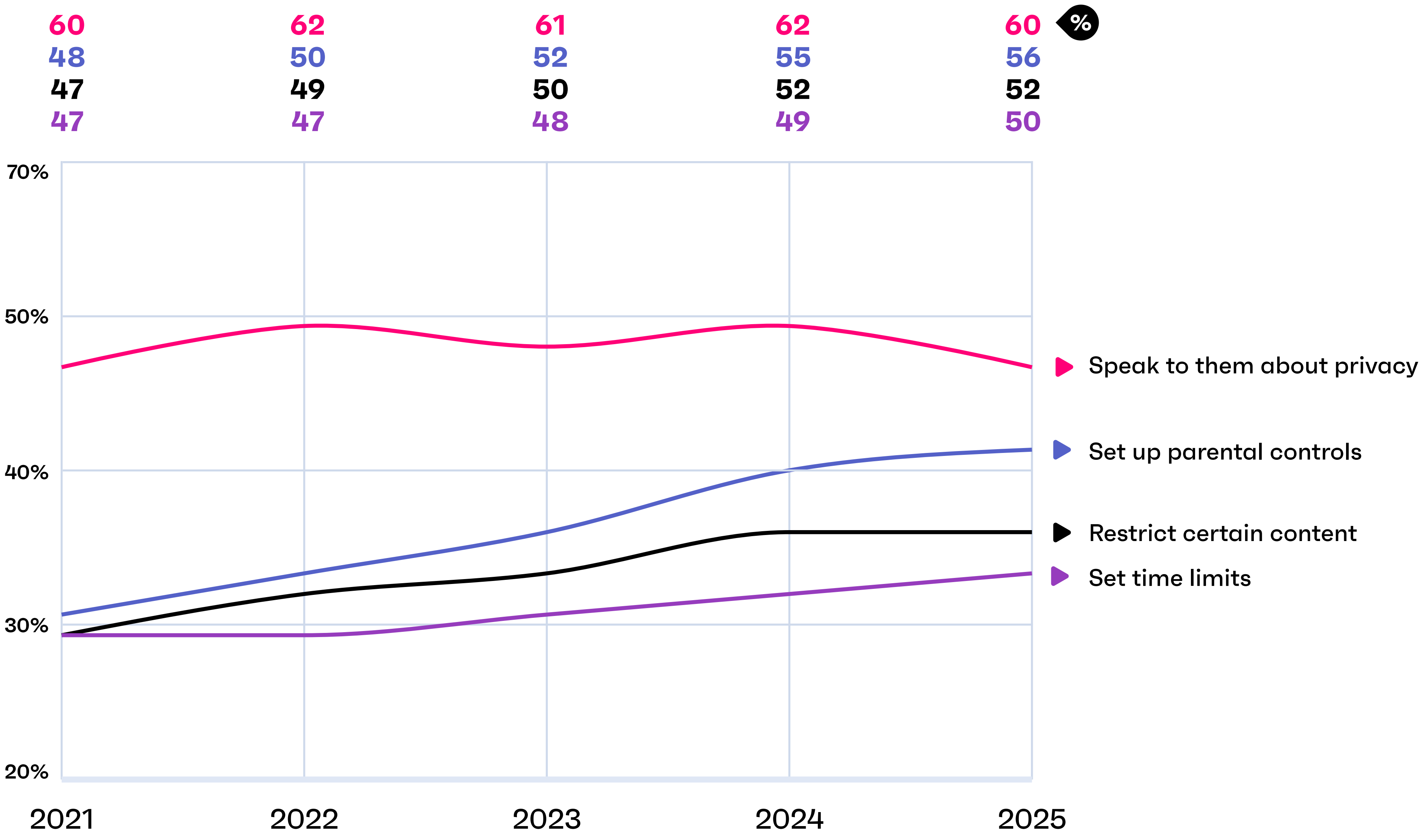
Worse, are we mischaracterizing behavior to suit our preferred narrative? For example, if today's kids have screen time limits and device restrictions (which appear to be strengthening with each year that passes), does that tell us we have a screen-dependent generation or a cohort of more informed parents who worry much more about this area?

Defining a generation shouldn't ever be about identifying a rigid blueprint that every member fits exactly. Gen Alphas across the world will come in many different shades. Our task is to seek out the prevailing influences and environments likely to mold their views and encourage certain types of behaviors.

Drawing on our multi-market research among Alphas aged 8-15 is illuminating. What you see quite quickly is they're not a simple continuation of Gen Z. Sure, there are some overlaps, but this is a generation whose formative years were fundamentally shaped by a once-in-a-lifetime pandemic. These are individuals who from their earliest years have moved across screens in a highly device-agnostic way, and individuals who are being parented by arguably the most attuned and mindful cohort of parents we've seen (predominantly millennials, but with smaller cohorts of Gen Z and Gen X on either side).

More kids have digital controls

% of parents who say they do the following to protect their child's privacy online



Many brands assumed Gen Z would be mini-millennials, and as we've learned, they were mistaken. The time it took to course correct has set those organizations back, and some are still catching up years later. Companies can't let history repeat itself by expecting Gen Alpha to be just like Gen Z, because the reality is, this generation will be unlike any we've seen before it.

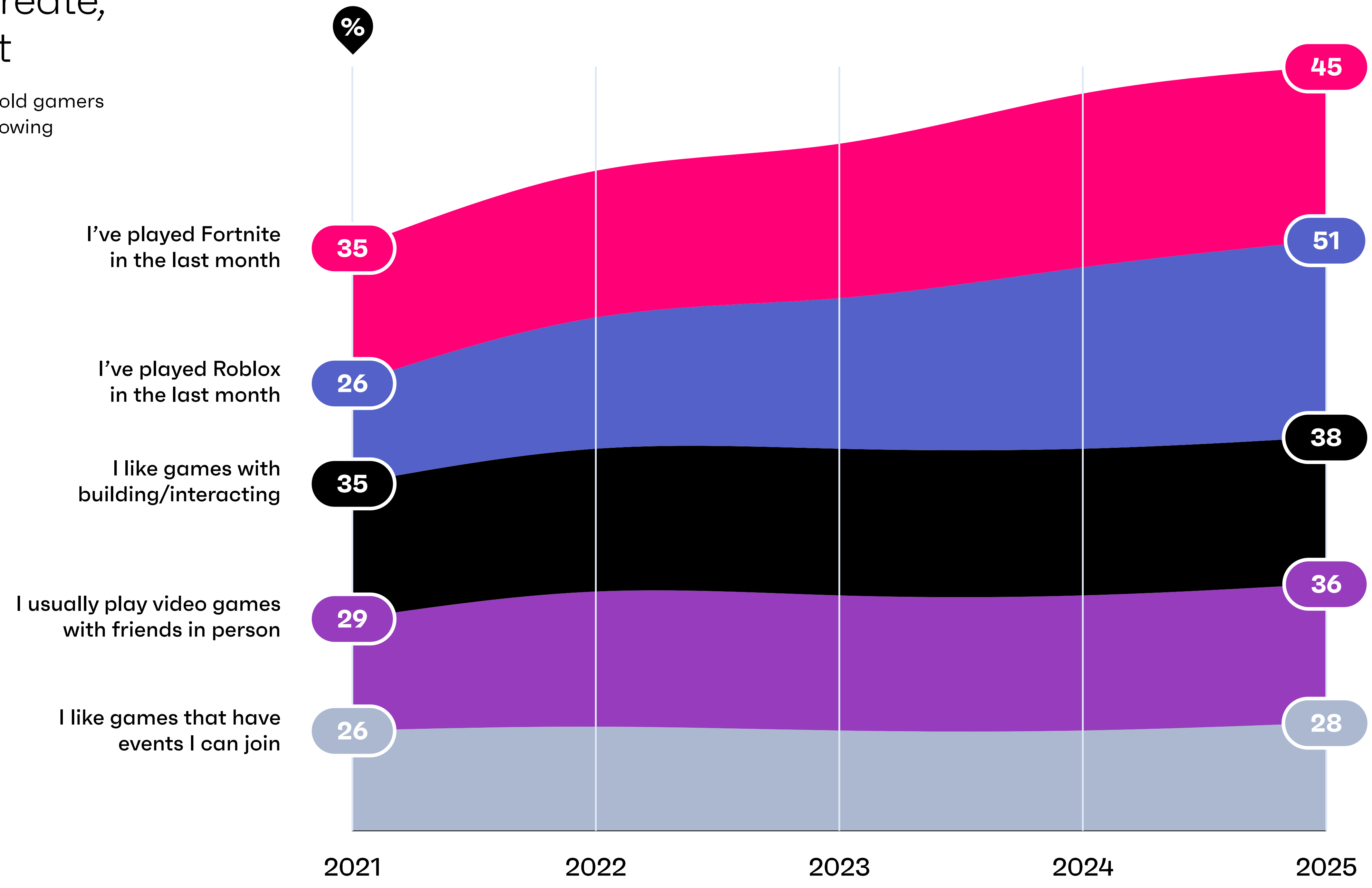
Ask our customers

razorfish

Dani Mariano
CEO, Razorfish

Craft, create, connect

% of 12-15 year old gamers who say the following



Here's a roundup of three surprising insights. First up, spending power. We've long heard the voices of children can be very powerful over financial decisions made by their parents, and the data backs that up. Over half of children aged 8-11 are deciding, whether individually or as a co-pilot with their parents - across areas like video games, food, clothing, and app purchases.

Among 12-15s, those figures rise higher to at least three quarters. In fact, older Alphas are increasingly likely to be making purchases themselves: the share of 12-15s buying products online each week has continued to climb, now standing at over a fifth globally (and peaking at 25% in the US).

Decision-making power goes hand-in-hand with digital exploration. Hence it's crucial that almost half of teen decision-makers say being treated their age is important to them. This group is also more likely to describe themselves as digitally fluent, socially aware, open-minded, creative, and confident. So, your messaging needs to be both empowering and responsible; fuel their confidence, while respecting their age.

One area that's more predictable - at least on the surface - is this generation's love of gaming: over three quarters are engaging regularly. It's not just about playing, though. Alphas use gaming environments to build, to connect, and to co-create.

Traditionally, some have seen gaming as a solitary behavior. But for Alphas, virtual play is spilling into the physical world; the share of teens who play video games with friends in person has grown over the last few years, and multiplayer party games - including hybrid hits like Mario Party – have seen an 11% rise in engagement since 2021.

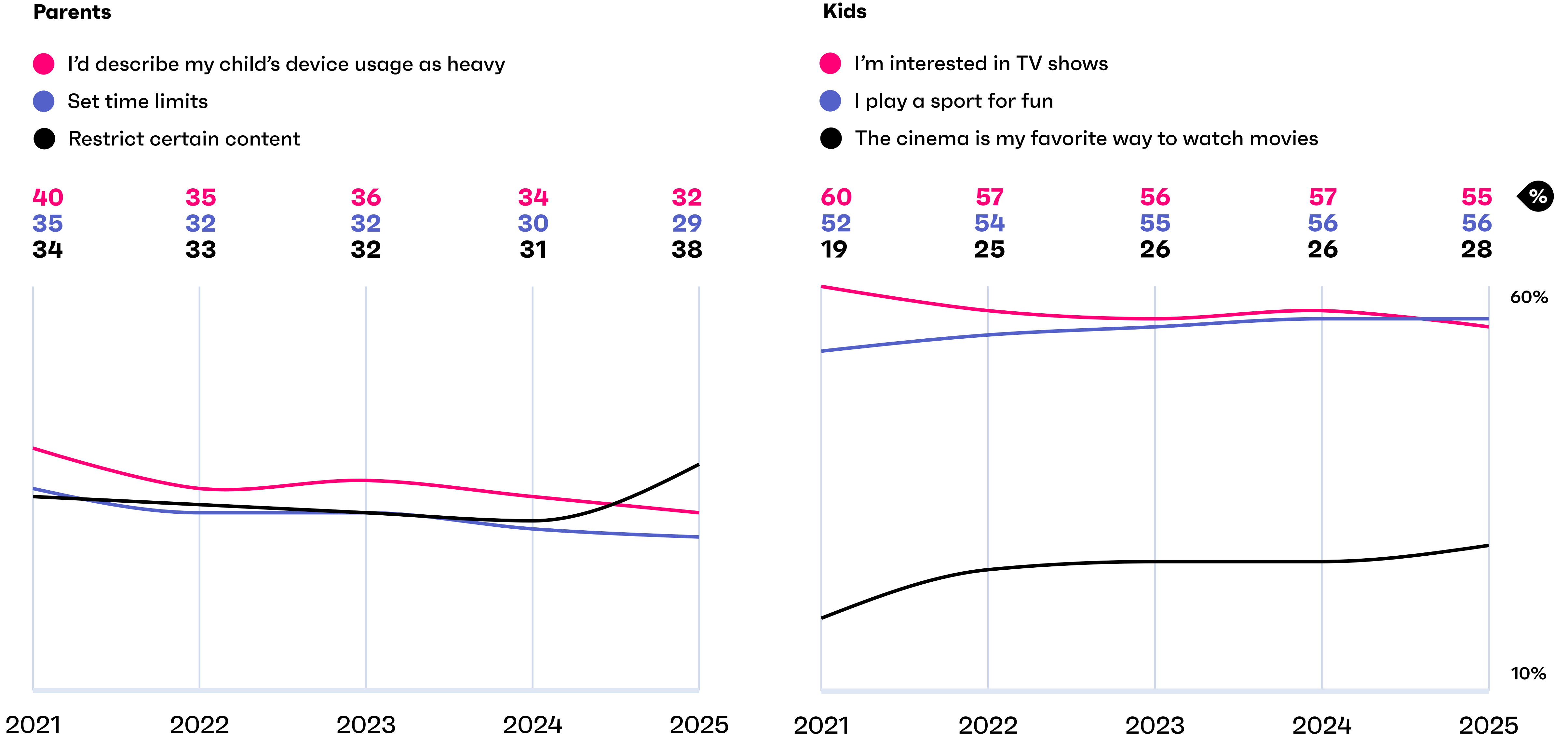
Games are also where friendships form, group chats start, and early dating happens. For Gen Alpha, it's not about choosing between online or offline: the best experiences are often a blend of both. Equally interesting is that, despite frequently aired concerns about screen time and tech-dependency, the data around how Alphas spend their time gives a much more nuanced picture.

Of course, the influence of the pandemic may loom large here. With extended lockdowns having restricted so many typical events - from school attendance to birthday parties and weekend meetups - it's not a surprise to see rises in some IRL activities.

But it goes deeper than that. Look at how parents characterize the amount of time being spent online or on devices by their children, and while you see an immediate, post-Covid drop, the subsequent years continue to show further, gentle declines.

Kids are logging off to live it up

% of parents/kids who say the following



Certainly, we're not talking about a full-scale unplugging, but rather a recalibration. Alphas still live digital-first lives, but they're making room for exploration, movement, and in-person connection. In fact, 40% of 12-15s say they take breaks from their devices - a sign that many are mindful about time online.

Other signs of this rebalanced approach to play? There's been a 16% rise in kids with a physical toy on their wishlist since 2023, and an 8% rise in those saying they play board games a lot in that timeframe. Elsewhere in our data, there are countless other signs that Gen Alpha are forging their own path as a generation in their own right, rather than just the little siblings of Gen Z: how they define concepts such as authenticity, trust, and collaboration; their expectations about brand relationships; how and why they use social platforms; how they perceive influencers; and what they expect when it comes to creativity.

To move beyond hunches and distinguish fact from myth, looking at what the data actually tells us is essential.

Yes, we can test our assumptions and see if what we're experiencing within our own circles is being observed more widely. But we have to be open to what the results say - the lines of thought which are unexpectedly challenged, as well as the rabbit holes we weren't expecting to go down.

And when we're talking about characterizing a generation, a small research snapshot from a single country or moment in time just doesn't suffice. You need to have scale. You need to speak to people over time. And you need to be looking across geographies. Gen Alpha deserves that type of attention, rather than being cast (incorrectly) as mini-Gen Z in waiting.

Gaming has become a connective thread across generations. To appeal to younger groups, gaming platforms must be authentic, trustworthy and collaborative digital “third spaces” where real connections are forged through conversations, shared experiences, and a sense of community

Ask our customers

Discord

John Eckhardt
Director of Data Science, Ads, Discord

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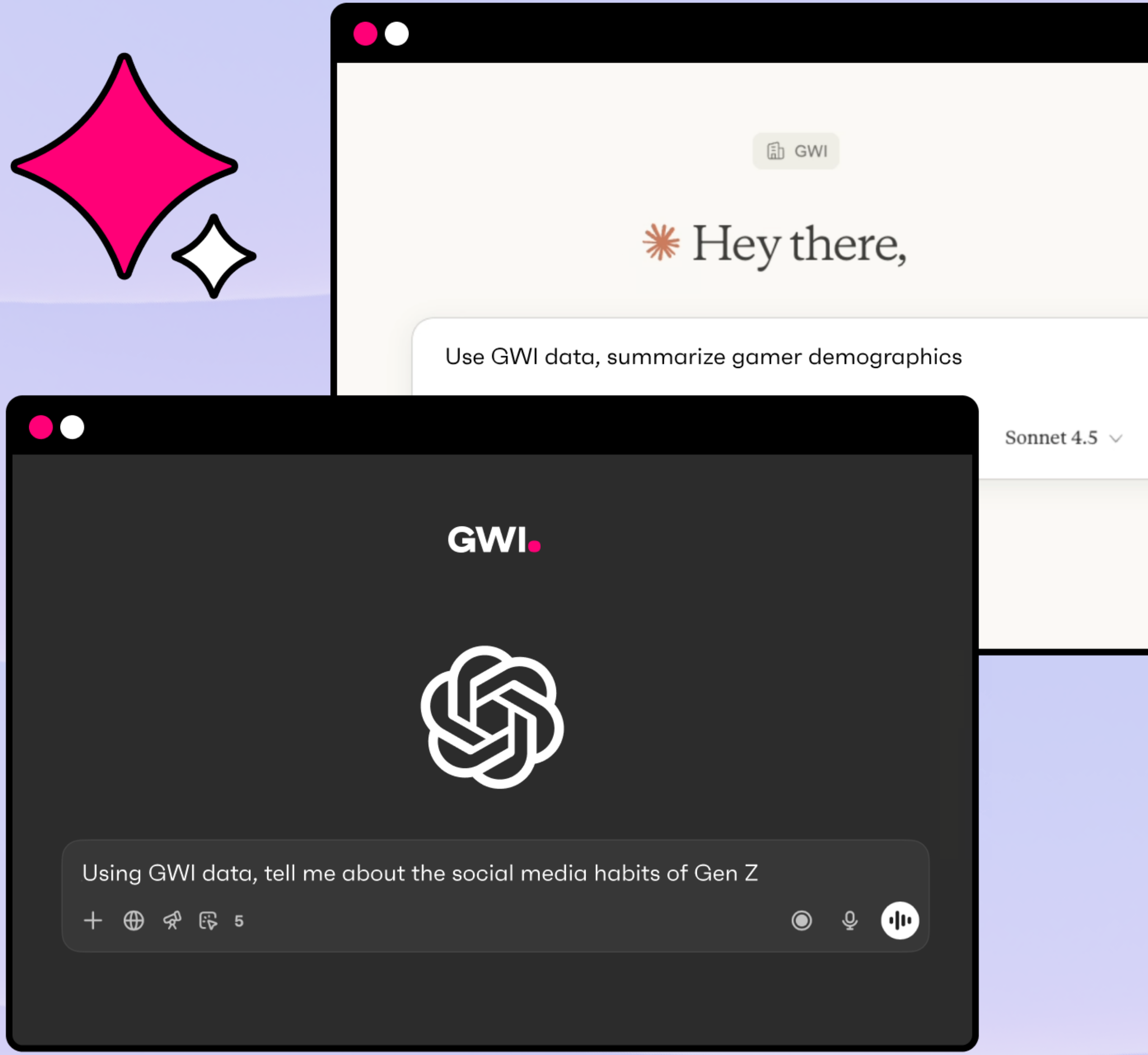

GWI.