THE : FUTURE : LABORATORY

The Future of Discovery

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Cover: Amazon Echo Buds, US
Above: Pinterest Predicts 2026

Introduction

Discovery no longer happens in isolated moments but unfolds as a continuous state, reshaping trust, visibility and identity across fragmented cultural systems. How can brands sustain relevance in this evolving landscape?

Discovery is often framed as the top layer of the marketing funnel, reduced to the initial moment of consumer awareness. But discovery extends far beyond engagement with products, services and brands. For individuals today, it is an ongoing process that shapes their sense of identity, helps to assemble their belief systems and informs how they move through the world.

This report examines how the content we consume, the communities we join, the products we buy and the recommendations we follow act as signals of affiliation, shaping how we understand ourselves and the world around us.

It traces the evolution of discovery from a singular moment of active exposure to a continuous, often passive and recursive system of identity construction, examining how loops of familiarity, personalisation and participation are reshaping cultural visibility.

For much of the 20th century, cultural reference points were formed collectively through broadcast media, where audiences encountered the same content at the same time within fixed, linear sequences. The commercialisation of the web in the mid-1990s disrupted this model, while the launch of Apple's iPhone in 2007 made the act of discovery portable, detaching media consumption from a fixed time or place.

Mobile now accounts for over **52%** of global web traffic, up from **31%** in 2015, according to Statista, accelerating this shift towards always-on, individualised media environments.

As media consumption becomes increasingly personalised, traditional pathways to discovery are dissolving, replaced by algorithmically curated ecosystems, where exposure is passive and content is filtered through predicted preference.

As Ana Andjelic, global brand executive and author of The Sociology of Business, told The Future Laboratory: 'We are served ever-more niche content by the algorithm, making our worlds narrower and narrower.'

This dynamic extends what Mark Fisher described in Capitalist Realism (2009) as a system that presents itself as limitless while constraining the scope of alternatives. Today's discovery landscape produces the illusion of infinite choice, while subtly narrowing what can be found, believed and engaged with.

'Discovery is a tricky word,' says Annie Castellano, a senior marketing executive with 25 years of leadership experience across agencies and Fortune 300 companies. 'It blurs the line between human curiosity – the search for meaning and self-actualisation – and the commercial endeavour of getting noticed and chosen.' While distinct, these forces increasingly converge, as people use what they consume to navigate and express identity.

Now, more than ever, discovery functions as a mechanism of connection, linking individuals to shared tastes, values and cultural moments while fostering belonging in an increasingly decentralised media landscape.

For brands, this signals a critical shift in value creation. In a saturated, always-on media environment, advantage no longer lies in visibility alone, but in decoding relevance, building trust and enabling individuals to recognise elements of themselves within increasingly complex cultural systems.

'[Discovery] blurs the line between human curiosity – the search for meaning and self-actualisation – and the commercial endeavour of getting noticed'

Annie Castellano, senior marketing executive

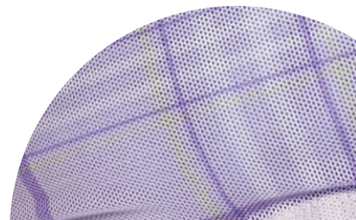


Lead analysts

Rose Coffey, *senior strategic foresight analyst*

Emily Rhodes, *senior strategic creative*

Cover: Amazon Echo Buds, US



At a Glance

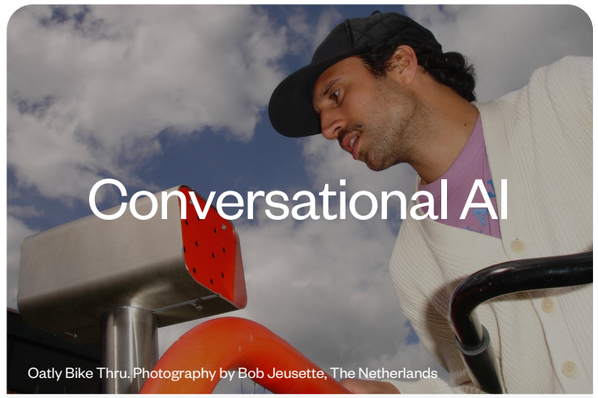
Key topics and takeaways from the report



As individuals move fluidly between multiple platforms, brands will need to build recognition across repeated, cross-platform encounters to remain visible and culturally relevant



Growing resistance against algorithmic mediation will drive consumers towards human-led networks. In these environments, credibility, expertise and community will shape discovery



Agentic systems will transform discovery from one-way search to a dialogical exchange, requiring brands to compete through tone, responsiveness and real-time interaction



Audiences will increasingly seek shared, time-bound experiences as live, participatory formats and physical spaces of discovery restore a sense of collective presence



Entertainment will become a connective discovery layer across culture, commerce and identity, with creator-led narratives, fandom economies and repeatable formats driving continual return

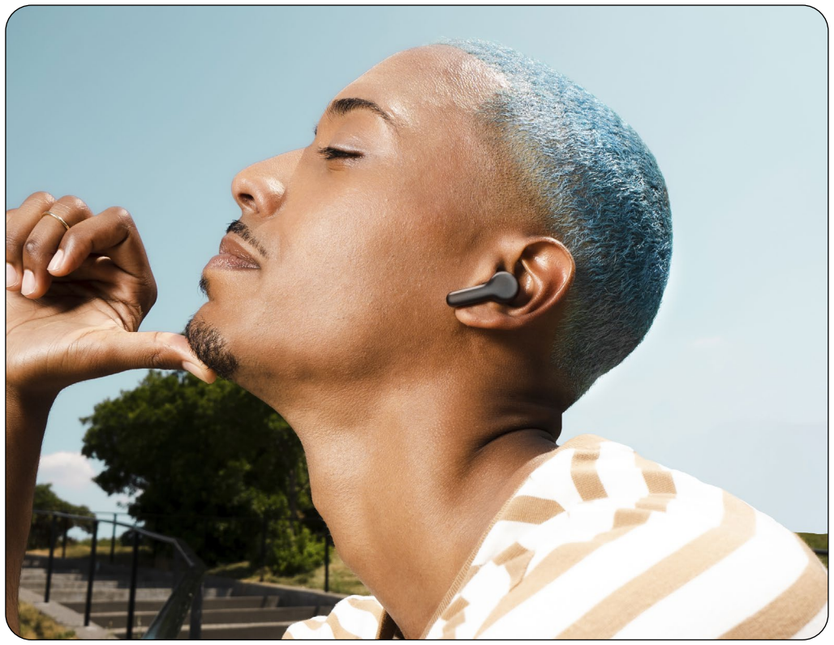


Designing for pace will become a strategic imperative. Rhythm and intentional pauses will help regulate attention, shape emotional intensity and establish meaning



Sound will emerge as a navigational layer, filtering distraction, directing attention and shaping emotional orientation

Key Statistics



6.75

social media platforms – the number adults now juggle every month on average

Source: GWI

↑ Up across every age group

50% +

of global online searches now happen by voice

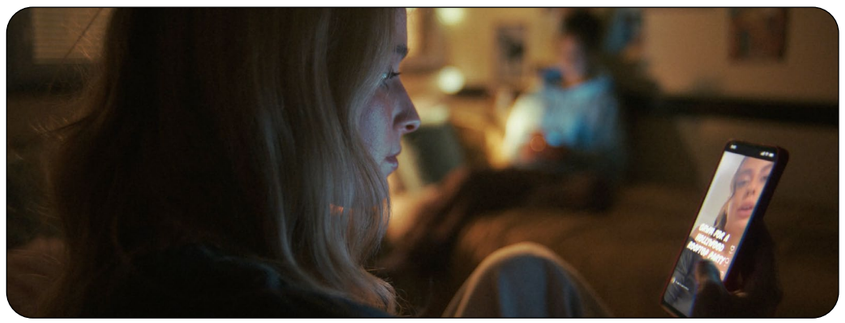
Source: Marketing LTB

↑ Hands-free is the new default

58% of shoppers have *swapped search engines* for generative AI

Product discovery moves from blue links to conversational prompts

Source: Capgemini

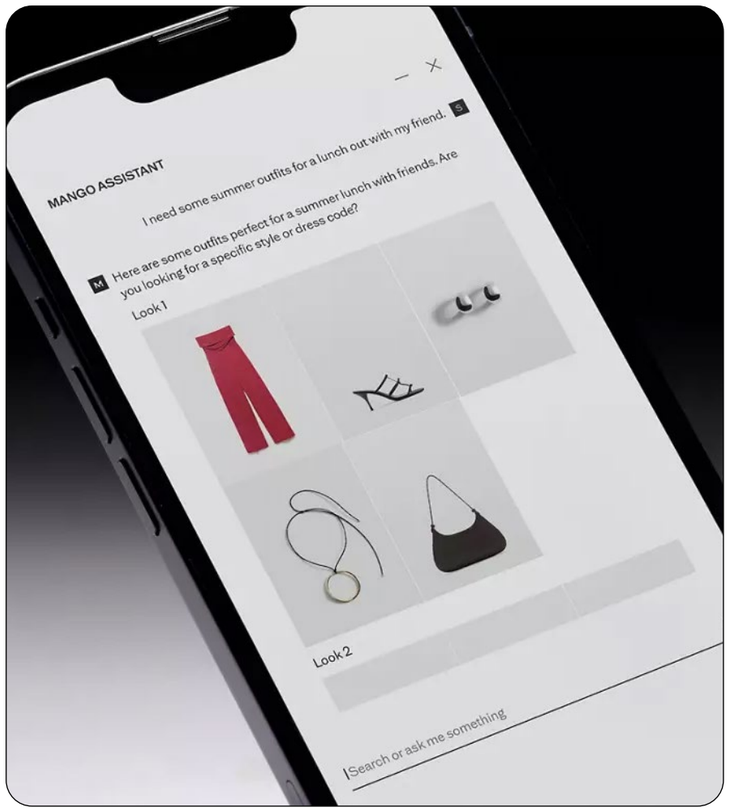


60%

of companies have adopted short-form video – now the most-used content format

Source: HubSpot

↑ 49% say it delivers their highest ROI



Images left to right: Amazon Echo Buds, US; Pinterest: Get Festive; Mango Stylist

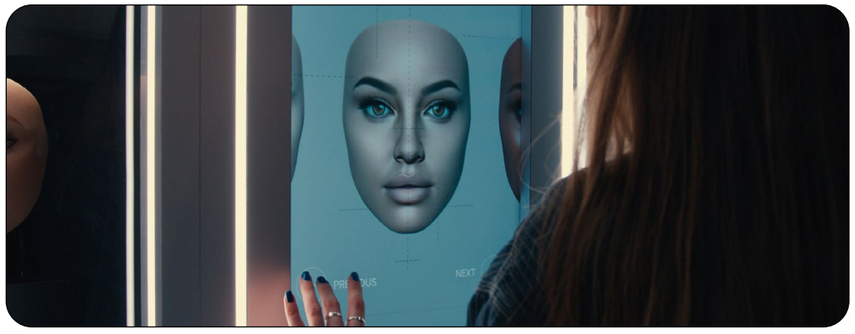
Key Statistics

59%

of young audiences say online content shapes their personal style

Source: YouTube Culture & Trends report

↑ 62% pick up slang from videos and memes



51%

of internet traffic is now generated by bots, not humans

Sources: Imperva, Graphite

↑ 52% of new written content is AI-generated



Live commerce will leap from *£127.1bn* to £1.8tn by 2033

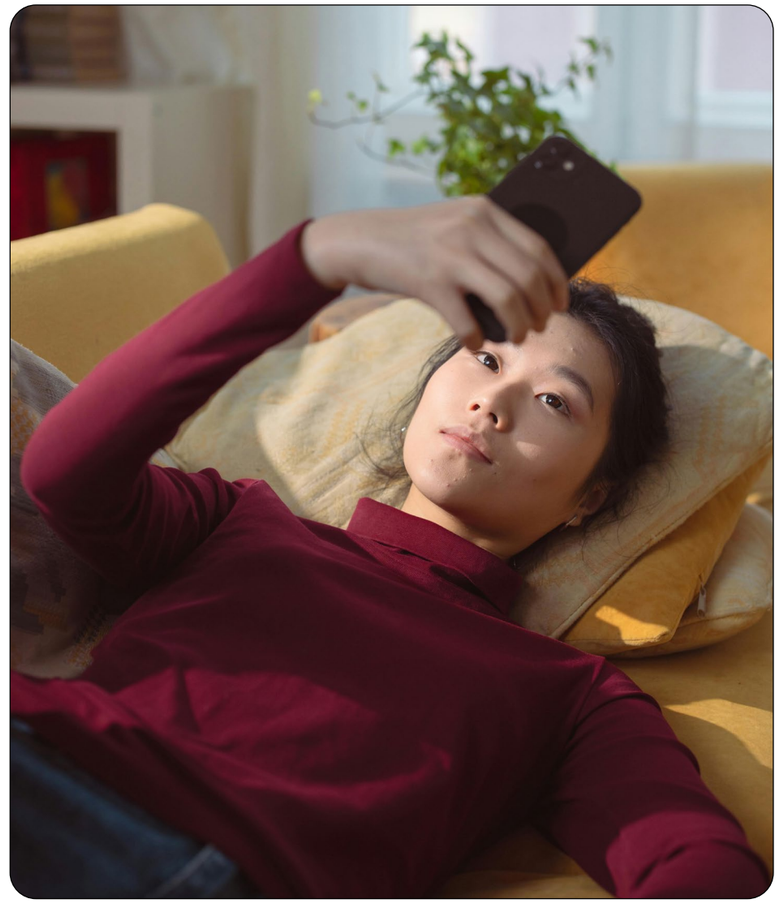
A **41%** CAGR from 2026 to 2033 — one of the fastest-growing channels of the decade

Source: Grand View Research

£10.3bn

Microdrama revenue will grow from **£8.1bn** in 2025 to **£10.3bn** by the end of 2026

Source: Omdia



Images left to right: The Beauty Machine by Dove, UK; Ffern summer 2025 campaign starring Bill Nighy, UK; Photography by Cottonbro Studio,

Drivers

Increasingly mediated by the familiarity bias of algorithms, discovery is unfolding through decentralised feedback loops, with users navigating continuous streams of content, culture and self

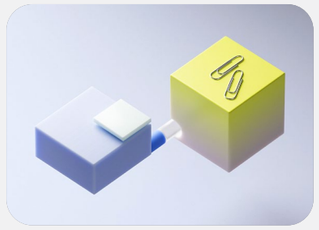
What are the drivers of a macrotrend?

These drivers define the landscape from which the macrotrend is emerging, detailing the consumer attitudes, market and sector shifts, as well as the cultural, social, economic, political, technological and environmental forces shaping a macrotrend. Each driver emerges from one or more of our global drivers



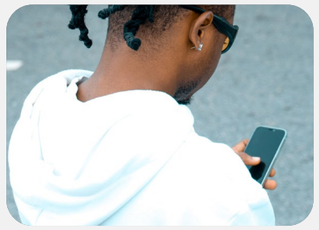
The Decentralised Discovery System

Discovery is becoming decentralised and non-linear, shaped by fragmented platforms, predictive systems and a collapsing marketing funnel. Brands must build recognition across repeated, cross-platform encounters to remain visible



Algorithmic Encounters

As AI-mediated search, GEO and social discovery converge, visibility shifts from ranking to selection. Brands must build authority and structure information for inclusion within increasingly synthetic, algorithmically curated ecosystems



The Attention Equation

As hyper-attention becomes the dominant mode of engagement, brands must design for high-quality moments of rediscovery as opposed to relying on single moments of impact



The Modular Self

As identity becomes modular and continually reshaped by digital culture, discovery shifts from mass relevance to personal resonance. Brands must create multiple entry points across evolving interests, contexts and self-expression

The Decentralised Discovery System

Discovery no longer follows a single, linear path. Instead, it unfolds across overlapping touchpoints shaped by personal preference, predictive systems and constant recirculation. As audiences fragment across platforms, devices and algorithmically curated feeds, brands must maintain their point of view and sustain presence across multiple environments to remain discoverable.

Online adults now use an average of 6.75 social media platforms each month, according to GWI, and second-screen behaviour is fast becoming the default mode of media consumption, with **86%** of global internet users using another device while watching tv (source: GWI).

As Leila Fataar, consultant, author and founder of Platform13, notes: 'The brand no longer controls that first contact. Someone might encounter your brand through a clip taken out of context… the entry point is out of your hands.' In this environment, what endures will be the ability to retain meaning in fragments.

Short-form video is now the most widely used content format, adopted by **60%** of companies, with **49%** reporting it delivers the highest ROI (source: HubSpot). This has accelerated the rise of cutdowns, with narratives compressed into platform-specific formats optimised for circulation.

Within the fragmented system, consumers build meaning through repeated, non-linear encounters. Success depends on creating recognisable signals that remain legible across platforms.

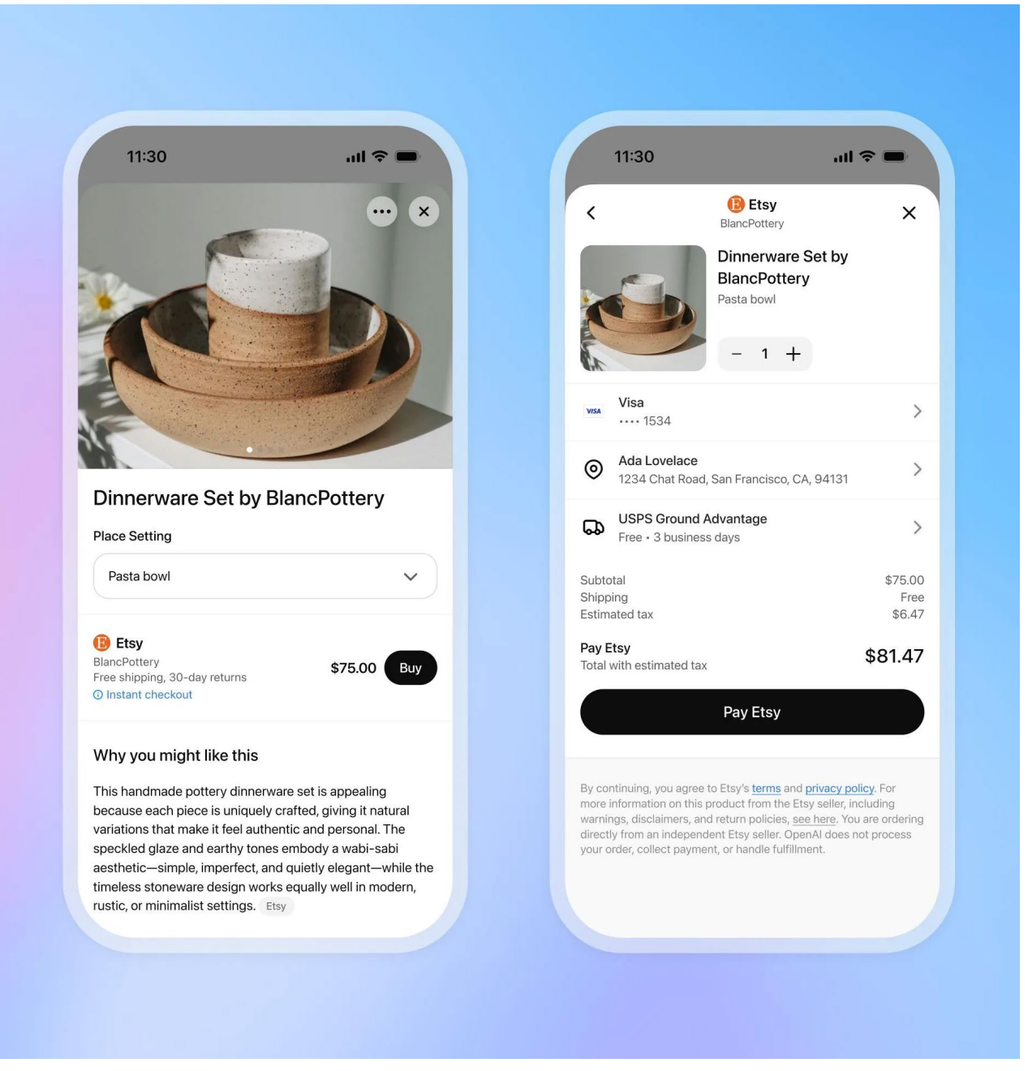
Related Global Drivers
Accelerating Technologies
Fragmenting Societies

Discovery has become untethered from linear time – information is fragmented across out-of-sequence, personalised timelines and re-encountered across multiple platforms

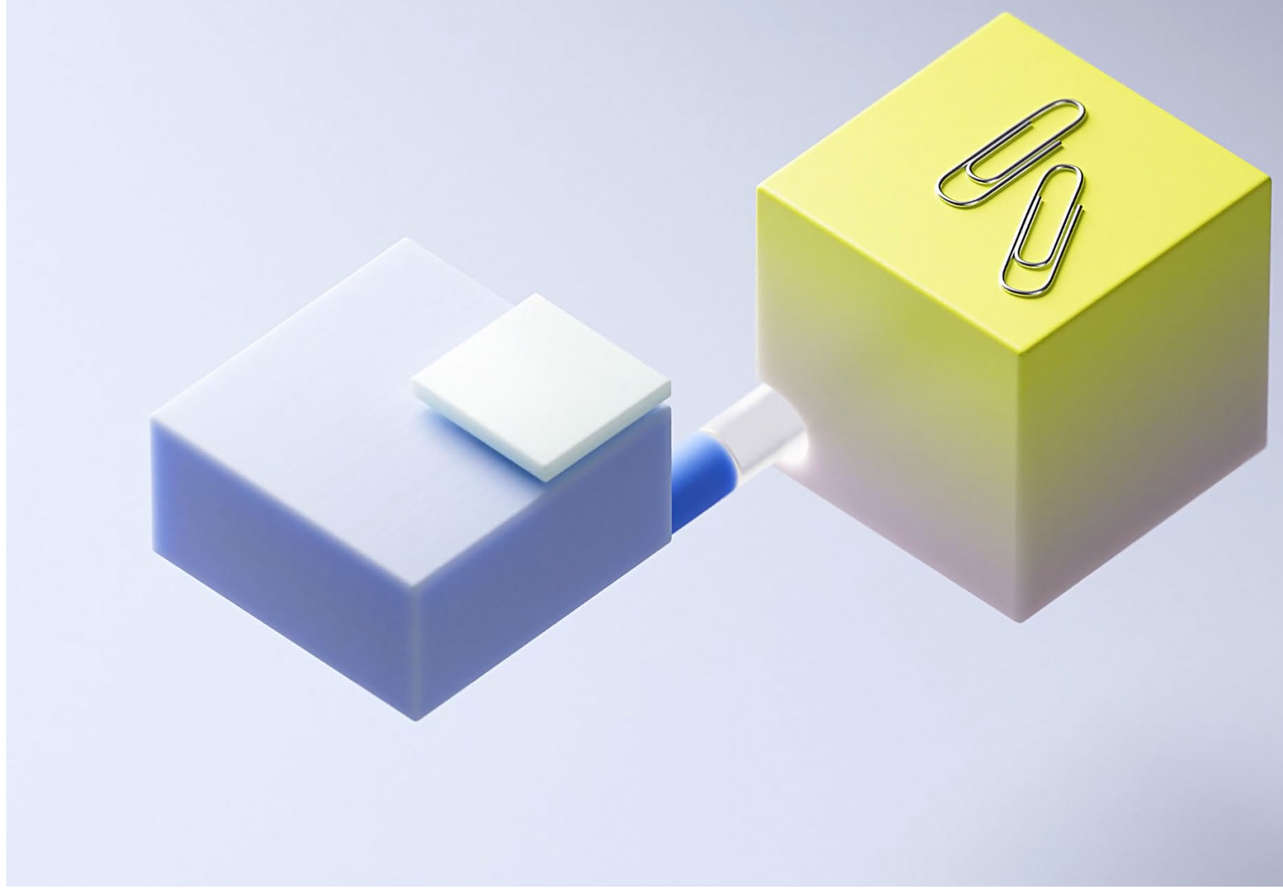
Phone Break by VML Czechia for KitKat, Czechia

‘One thing for sure is that almost **60%** of discovery is happening on LLMs, specifically ChatGPT and Google’

Ekta Chopra, chief digital officer, Elf Beauty (source: Glossy)



Etsy on ChatGPT, US



Google DeepMind, UK

Algorithmic Encounters

As generative tools reshape discovery, brands must now compete for inclusion within AI-generated responses.

‘One thing for sure is that almost **60%** of discovery is happening on LLMs [large language models], specifically ChatGPT and Google,’ Elf Beauty chief digital officer Ekta Chopra told Glossy. ‘It’s not [only] about the checkout. It’s more about being there as part of the consumer’s journey, because the whole funnel is collapsing.’

Whereas SEO (search engine optimisation) rewarded page rank, GEO (generative engine optimisation) prioritises authoritative, structured and evidence-based sources within AI-powered interfaces (source: Forbes). Consumer behaviour is already changing: **58%** of people have replaced traditional search engines with generative AI tools for product recommendations, while AI overviews have reduced average click-through rates by **34.5%** (sources: Capgemini, Ahrefs).

At the same time, search and social media are converging. Some **41%** of Gen Z now use social media platforms first for information discovery, while TikTok searches have risen by more than **40%** year on year (sources: Sprout Social, TikTok).

Within this hybrid ecosystem, information becomes increasingly synthetic. In 2025, bots generated **51%** of internet traffic, while **52%** of new written content was estimated to be AI-generated (sources: Imperva, Graphite).

For brands, this raises questions about authority, trust and how to remain visible within systems that increasingly decide what information is shown, cited and believed.

Related Global Drivers
Accelerating Technologies
Fragmenting Societies

Discovery is no longer governed by human taste alone, but by the logic of systems that structure and shape how culture is surfaced and understood

Photography by Aj Collins, Lagos

The Attention Equation

As consumers move between distraction, engagement and return, discovery becomes an ongoing negotiation shaped by context, intent and relevance.

This shift challenges traditional assumptions about reach and visibility. Annie Castellano told The Future Laboratory that ‘repeated exposure is required before something registers’ while cautioning that exposure without context delivers limited value.

Research from McKinsey & Co found that over the past decade, the total number of hours each day that consumers watch, listen to, read or otherwise interact with content has barely grown, increasing roughly **1–2%** a year. This shows that audiences are redistributing the same amount of time across more channels, creators and formats; therefore, the competition is for higher-quality moments within limited attention capacity.

Industry measurement frameworks are adapting accordingly. The Interactive Advertising Bureau’s Attention Measurement Framework distinguishes between viewability – the opportunity to be seen – and attention, defined as the likelihood of meaningful engagement. This signals a broader move away from equating delivery with impact.

A 2025 paper published in AI & Society identifies two cognitive modes shaping behaviour: deep attention, linked to sustained focus, and hyper-attention, associated with rapidly shifting environments.

Within hyper-attention mode, brands must continually re-earn attentiveness across repeated moments of interaction, distraction and rediscovery. A recurring Instagram ad may be ignored multiple times before becoming meaningful when intent aligns, demonstrating how attention is re-earned across encounters.

Related Global Drivers
Accelerating Technologies, Urbanising World

Discovery operates across moments of compressed attention, distraction and re-engagement, resulting in condensed moments of focus, intent and relevance



The Modular Self

As identity becomes increasingly modular, discovery shifts from mass relevance to personal resonance.

In the social media era, re-invention became aspirational, encouraging consumers to experiment with identity and self-expression. Claudine Cheever, chief marketing officer at social discovery platform Pinterest, points to an increasingly selective approach to identity construction. 'Users are no longer asking 'What is popular?' but instead 'What feels credible for me? What reflects my identity?"

The YouTube Culture & Trends Report highlights the scale of this influence. Among young audiences, **59%** say their personal style has been shaped by online content, and **62%** adopt language or slang from videos and memes.

Historically, identity was shaped by life stage and long-term brand loyalty. Today, it exists across overlapping contexts, interests and affiliations. Uche Okonkwo, head of AI innovation and acceleration at Google Research, describes this shift as 'identity stripping' – a shift towards recomposable identity, where aspects of the self are continually deconstructed and rebuilt through new inputs and experiences.

For brands, this reframes discovery as an identity system rather than a funnel. As Ana Andjelic of The Sociology of Business observes, successful brands are moving away from singular positioning towards 'portfolio thinking' – creating multiple points of relevance across different identity layers and cultural contexts. Andjelic cites Supreme's high-frequency, limited drops, blending mass cultural visibility with individual distinction, as well as Stone Island's balance of cultural scale with sub-cultural specificity.

Related Global Drivers
Fragmenting Societies,
Evolving Demographics

Discovery is no longer a linear path to products or content, but a decentralised system through which identity becomes increasingly stackable, editable and continually reinforced

'Users are no longer asking 'What is popular?' but instead 'What feels credible for me? What reflects my identity?"

Claudine Cheever, chief marketing officer, Pinterest



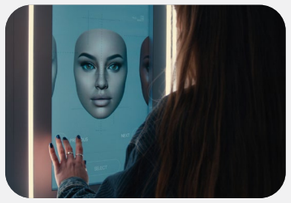
Above and left: Pinterest Predicts 2026

Insight

Consumers are seeking personalised pathways that reflect their individuality, while also craving shared moments of connection. To meet this need, brands must design for both individual resonance and shared cultural participation

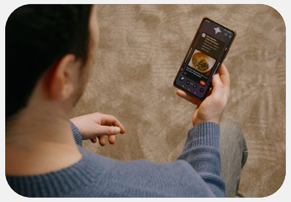
What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2030. Insights help brands and businesses understand and identify the opportunities presented by this trend



Programmed Familiarity

With recommendation systems rewarding familiarity, discovery is increasingly recursive. Brands must decide whether to use algorithmic recognition or challenge the feedback loops shaping visibility, trust and cultural exposure



Dialogical Domains

As AI-mediated discovery becomes conversational, search shifts from keywords to dialogue. Brands must build linguistic identity and conversational capability to guide decisions, shape preferences and remain relevant within interaction-led ecosystems



Networked Communities

As discovery becomes community-led, brands must move from audience acquisition to participation, building credibility within networks centred around shared interests and human expertise



Collective Encounters

With consumers seeking collective experiences and shared moments of participation, brands can create relevance through time-bound experiences that restore presence, synchrony and real-time engagement



Entertainment Capital

As entertainment becomes a primary mode of discovery, brands are creating ongoing narratives featuring episodic formats and personality-led content, which increasingly drives attention, familiarity and repeat engagement



Proximity and Place

As digital discovery becomes increasingly predictive, proximity and place regain value. Physical environments create shared, situational encounters that interrupt routine and enable discovery through context, atmosphere and real-world presence

Programmed Familiarity

Brands are navigating a landscape shaped by systems that reward recognition. As a result, they must choose to either operationalise, expose or creatively manipulate these feedback loops.

In February 2026, engineers from global video sharing platform YouTube formally identified ‘familiarity bias’ within their recommendation system, describing how a user’s previous interactions shape what is brought to the surface next (source: Alphabet). Rather than expanding discovery, these systems can reinforce existing preferences, creating recursive patterns of cultural consumption.

Brands are increasingly responding by operationalising this recognition. In December 2025, as part of its annual Wrapped campaign, audio streaming platform Spotify introduced a ‘listening age’ metric, transforming algorithmic familiarity into a shareable identity signal rooted in nostalgia and repeat behaviour.

Elsewhere, in November 2025, fashion brand Valentino Garavani’s Age of Electric Couture project used generative systems to re-interpret archival design codes, positioning familiarity as a creative input rather than a limitation.

Some brands are demonstrating these dynamics directly. In April 2026, global personal care brand Dove’s The Beauty Machine installation at London’s Waterloo Station replicated the logic of a social media feed, revealing how algorithmic systems can appear diverse while repeatedly resulting in homogenised outcomes.

Leila Fataar of Platform13 argues that ‘the most powerful moments of discovery are moments of recognition’.

As recognition becomes a dominant mode of discovery, brands face a strategic choice: work with algorithmic familiarity by amplifying recognisable codes and repeated cues, or challenge these systems by exposing, disrupting or reframing the patterns they reinforce.



‘The most powerful moments of discovery are moments of recognition’

Leila Fataar, founder, Platform13

Dialogical Domains

A distinctive shift in the process of discovery is becoming evident, as consumers navigate conversational exchanges and increasingly use open-ended questions.

Google's Year in Search 2025 identified a rise in conversational prompts such as 'tell me about…' and 'what's the deal with…?', signalling a move towards exploratory discovery journeys.

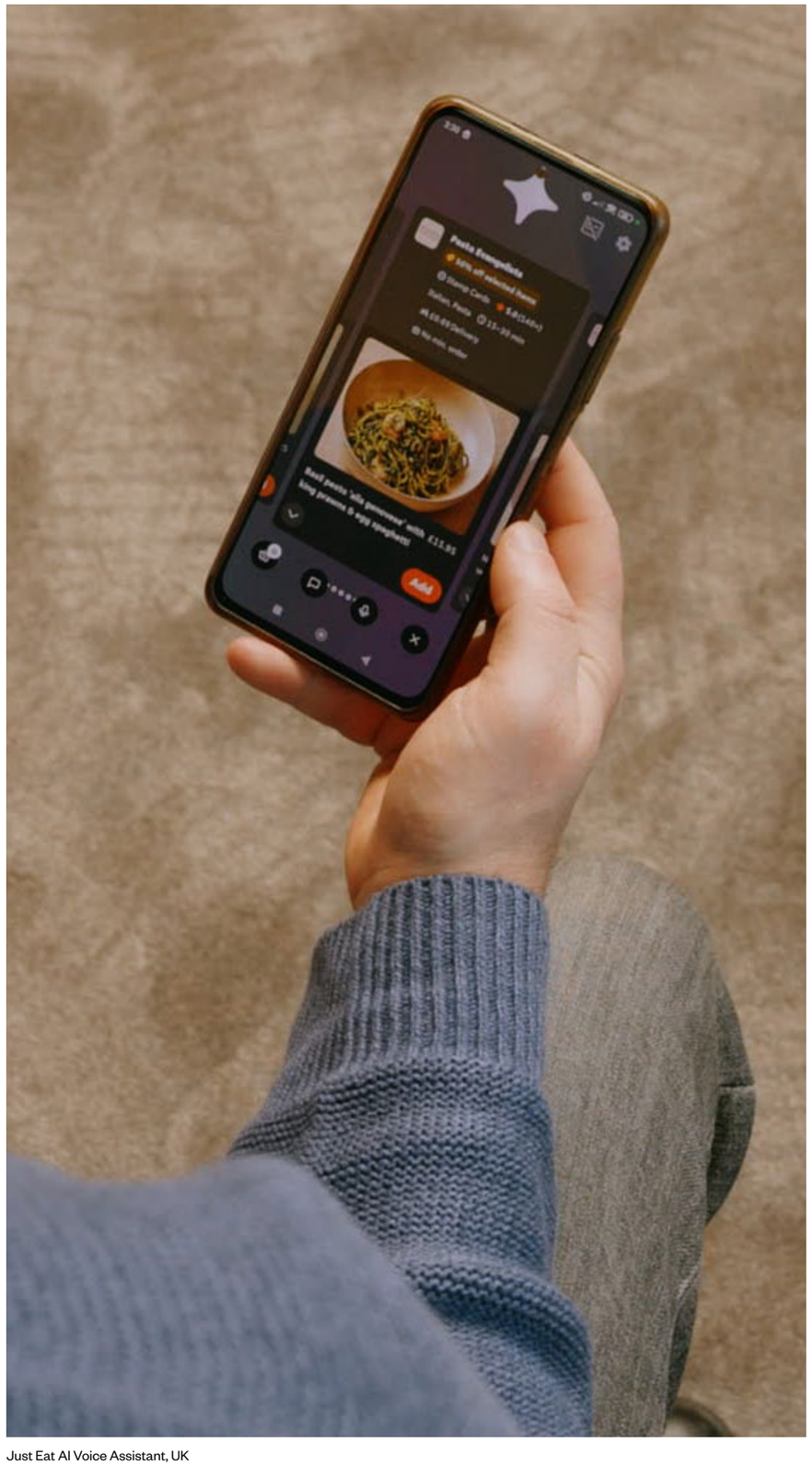
In October 2025 at the FT Future of Retail conference in London, Caterina Runa Miranda, global AI and platform director at Danish jewellery brand Pandora, highlighted the brand's use of conversational designers – specialists focused on how brands speak, respond and guide users through interaction. Miranda noted that 'understanding conversational flows enables brands to connect meaning to the customer journey… giving a perspective of consumer and brand in real time'.

Messaging ecosystems reinforce this evolution. In markets such as Brazil, WhatsApp functions as a discovery engine, while retailers like Magalu have launched AI-powered storefronts within the platform.

Voice-led interfaces are further accelerating conversational discovery, with more than **50%** of global online searches now conducted through voice assistants and research suggesting that vocalised queries can improve satisfaction by aligning more closely with user intent (sources: Marketing LTB, Journal of Consumer Research).

Language is becoming a form of brand infrastructure as conversational interfaces extend into commerce, messaging and physical products – from WeChat ecosystems in China to the conversational capabilities of German automotive brand Mercedes-Benz's CLA model.

As discovery becomes conversational, brands must treat language as infrastructure. Those investing in conversational capability and linguistic identity will be better positioned to guide decision-making, capture intent and influence preferences in real time.



Just Eat AI Voice Assistant, UK



British cult fashion brand Peachy Den invites members of its community to intimate events, UK

Networked Communities

In a saturated media landscape, consumers are turning to online platforms where recommendation feels socially filtered rather than algorithmically delivered. This is reflected in platform behaviour, with users aged 18 to 34 accounting for more than **60%** of Reddit's audience (source: GrabOn).

Tiina Nyman, Finland-based author of the Circular Fashion News newsletter on Substack, positions human judgement as a form of validation in the era of 'AI slop': 'People are looking for niche expertise… someone who can collate information and narrow it down effectively.'

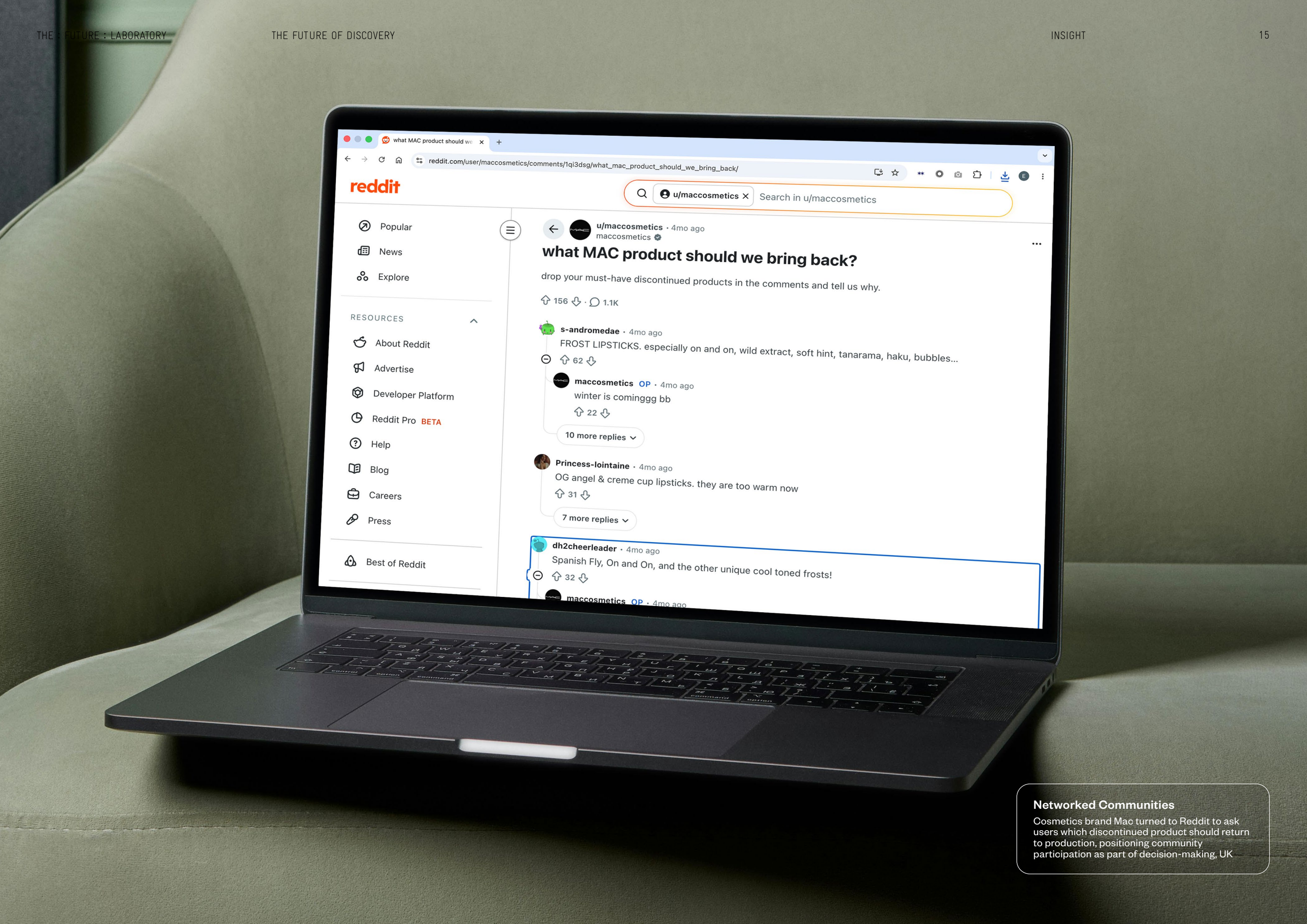
Brands are responding by embedding themselves into existing conversations and communities. In June 2025, US fast food chain Jack in the Box partnered with Discord servers linked to the video game Fortnite to support a live-stream campaign inside a self-organised gaming network.

Similarly, in January 2026, cosmetics brand Mac turned to Reddit to ask users which discontinued product should return to production, positioning community participation as part of decision-making.

At Social Media Week 2025, Substack's head of lifestyle, writer and creator partnerships Christina Loff urged brands to cultivate conversations rather than control them – a strategy reflected in the Sex Happens newsletter from US reproductive healthcare brand Julie.

Lina Kling, founder of German lifestyle brand Matcha Routine, cautions that 'brands must develop a clearer understanding of which cultural movements align with their core identity', noting that 'this selective approach enables the formation of more meaningful communities built around shared relevance and cultural resonance'.

Brands can no longer assume visibility creates trust. The opportunity lies in contributing to existing ecosystems – showing up where credibility is already formed rather than attempting to manufacture it.



Networked Communities

Cosmetics brand Mac turned to Reddit to ask users which discontinued product should return to production, positioning community participation as part of decision-making, UK

Collective Encounters

Audiences are gravitating towards formats that feel shared, participatory and socially witnessed, seeking experiences that offer real-time interaction.

To counter fragmented attention, brands are creating formats built around live interaction and collective presence. Global streaming platform Netflix launched a new feature in January 2026 that allows users to vote on live content in real time – shifting the role of the audience from passive viewers to active contributors. In November 2025, outdoor performance brand Merrell's Trail Sonified activation used Strava performance data to shape a live DJ set.

Live commerce reflects a similar shift. The global live commerce market size was estimated at £127.1bn ($172.8bn, €147.2bn) in 2025 and is projected to reach £1.8 trillion ($2.5 trillion, €2.1 trillion) by 2033, growing at a CAGR of **41%** from 2026 to 2033 (source: Grand View Research).

Daniel Fisher, head of categories and expansion Europe at live shopping marketplace Whatnot, attributes the success of this category to the increased demand for shared experiences and human connection, likening the experience of live commerce to 'walking into a great local shop… where the shopkeeper knows exactly what they are talking about'.

In parallel, physical retail is regaining relevance as a site of discovery. Stores are functioning as cultural gathering points and sites for participation rather than transaction alone. This is reflected in the March 2026 opening of Fred Perry's music-led flagship store in Soho, designed as an event-ready cultural gathering space.

These experiences – which are shared, witnessed and remembered collectively – are building trust through collective presence.





Left to right: Trail Sonified by Brandnation for Merrell, UK; The premiere of Roomies by Bilt, US

Entertainment Capital

Entertainment is fast becoming a primary discovery system rather than a supporting marketing layer. As audiences spend more time within creator ecosystems and episodic formats, brands are increasingly discovered through short-form personality-driven narratives.

Creators are at the centre of this shift. As Rebecca Dowell, artist manager at international management and entertainment company Three Six Zero, observes: 'Audiences gravitate towards personality-led talent because their content feels honest and authentic, creating a sense of familiarity and connection. As a result, discovery is often led by the persona and the relationship they cultivate with their audience.'

Brands are embedding their operations within these entertainment ecosystems. In January 2026, US house of brands Gap Inc appointed its first chief entertainment officer, formalising entertainment as a strategic function across music, film, gaming and cultural collaborations.

Mobile consumption is a key driver of this shift. In May 2026, Netflix made a move towards mobile-first behaviour with the launch of Clips, a new vertical video feed designed to make content discovery faster.

Episodic formats reinforce this. Microdramas, short-form, highly dramatised vertical series, are rapidly scaling, with global revenues reaching £8.1bn ($11bn, €9.4bn) in 2025 and set to grow to £10.3bn ($14bn, €11.9bn) by the end of 2026 (source: Omdia).

Brands are already testing these entertainment-native formats. In June 2025, US fintech platform Bilt unveiled Roomies, a scripted mockumentary, and in March 2026, Pinterest introduced Bring My Pinterest to Life, a six-part shoppable tv series that transforms users' boards into real-world outcomes.

As discovery becomes entertainment-led, brands must build repeatable narrative systems that reward return behaviour, using creators and episodic formats to sustain relevance beyond single campaigns.



Collective Encounters

Outdoor performance brand Merrell's Trail Sonified activation used Strava performance data to shape a live DJ set. Images courtesy of Brandnation, UK

OOH reached a record £1.44bn ($1.96bn, €1.66bn) in annual revenue in the UK in 2025

Source: The Media Leader



Scratch and Sniff by Billie, New York, US

Proximity and Place

As digital discovery becomes increasingly optimised, physical space is increasingly shaped by proximity, atmosphere and embodied interaction.

Nick Roberts, partnerships director and strategy lead at UK architectural and retail design studio Brinkworth Design, highlights the importance of environments anchored in real-world presence, pointing to the unintended consequence of optimisation: a loss of meaning, where moments of surprise are replaced by pre-empted outcomes.

Out-of-home (OOH) media operates as a counterbalance to this dynamic. Rather than filtering exposure through data and behaviour, it re-introduces unplanned, situational encounters shaped by proximity and place. This renewed value is reflected in market growth: OOH reached a record £1.44bn ($1.96bn, €1.66bn) in annual revenue in the UK in 2025 (source: The Media Leader).

Brands are responding by designing place-based experiences that interact with real-world conditions. In January 2026, Belgian alcoholic beverage brand Stella Artois created a snowfall-responsive installation in Toronto, while in February 2026, multinational brewing company Heineken rolled out a temperature-triggered campaign across the UK, The Netherlands and Canada that guided passers-by towards nearby pubs in real time.

This shift also signals a move towards embodied discovery, where meaning is shaped not only through what is seen, but also through how environments are physically experienced. In the past year, bodycare brand Billie, cosmetics brand NYX, deodorant brand Sure, US make-up brand Rare Beauty and men's grooming brand Lynx have all launched scratch-and-sniff billboards, using tactile interaction to extend discovery beyond screens.

As digital discovery becomes increasingly predictive, physical environments offer brands opportunities to create moments that cannot be algorithmically anticipated. Designing for place, atmosphere and sensory responsiveness enables discovery through surprise, presence and shared context.

Foresight

Discovery becomes a reflection of how we think, identify and belong. In a world of personalised realities, where past and present coexist, truth is no longer given, but actively uncovered

What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergences or developments



Cognitive Outsourcing

As consumers increasingly outsource decision-making to AI agents, discovery shifts from active searching to delegated choice. Trust moves towards automated systems that interpret intent, filter options and shape what individuals encounter



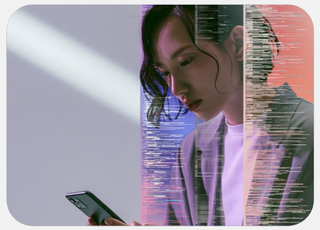
Sonic Mediation

In a future when discovery shifts to atmospheric guidance, consumers will rely on sonic cues and audio systems to navigate attention, emotion and environment



Polarised Belief Markets

As discovery fragments, consumers seek belonging through shared identities, fandoms and cultural affiliation. Brands must build communities that foster connection while avoiding the risks of closed, polarised ecosystems



The Continuous Present

As discovery accelerates into a continuous present, consumers navigate culture through fragmented moments. Brands must shift from chasing attention to controlling pace using rhythm, repetition and pauses to build meaning over time

Cognitive Outsourcing

As agentic AI becomes embedded into everyday decision-making, discovery will increasingly be outsourced rather than actively pursued.

Research published by The Competition & Markets Authority in March 2026 explored how Agentic AI could fundamentally alter market behaviour – where consumers move from searching and comparing to delegating to agents that interpret intent, filter options and act on their behalf, reshaping who – or what – controls discoverability.

Gina Cui, assistant professor of marketing at Coastal Carolina University, notes AI-mediated discovery compresses the journey from identifying a need to finding a solution while omitting curiosity. Over time, this could reduce active exploration, replacing discovery with recommendation-led acceptance.

This shifts responsibility back onto the individual, who must actively question and expand beyond what is on the surface. As Andi Davids, global chief growth officer at brand agency Bulletproof, observes: ‘Discovery now requires more work – we have to actively challenge our own perceptions and question what we’re seeing.’

In this future, brands that build transparency, clear value articulation and trusted data infrastructure will be better positioned to remain visible when consumers increasingly outsource choice itself. This creates a dual imperative: to be selected by systems, while creating the moments of curiosity and serendipity those systems cannot generate.



Linus Zoll for Google DeepMind, UK



Sonic Mediation

As digital and urban noise intensifies, sound will emerge as a mediating layer between individuals and their environment, functioning as an interface through which experience is structured.

For brands, this reframes sound from a branding asset into navigational infrastructure. Sonic systems could guide attention, signal trust and shape emotional context before visual engagement occurs.

Aifric Lennon, managing director at UK-based sonic branding agency Father, argues that sound will become a critical interface for navigation: guiding attention, shaping perception and anchoring meaning. ‘Sound will play a critical role in shaping emotion and influencing how other media, including visuals, are perceived,’ she says. ‘Within discovery, the right sonic cues will cut through saturated environments and capture attention, setting the tone for how an experience is understood.’

In this context, sonic identity will determine a brand’s emotional and experiential coherence, while discovery will shift to something atmospherically guided.

Early prototypes signal a move towards fully responsive sonic environments. Systems such as OasisMind enable the generation of ambient soundscapes through natural language input, while Sona mediates real-world audio by filtering sound based on context and individual sensitivity.

For brands, this creates an opportunity to design for selective attention. Quiet interfaces, slowed pace, reduced sensory layering and intentional friction may become powerful tools for creating memorability in overstimulating environments.

‘The right sonic cues will cut through saturated environments and capture attention, setting the tone for how an experience is understood’

Aifric Lennon, managing director, Father



From Left to right: The JD Sports and ASICS House pop-up combined wellness and music with a listening lounge and DJ sets, London, UK



‘We’ve never had more ways to discover information, but it’s never been harder to find what is unbiased or true’

Andi Davids, global chief growth officer, Bulletproof

The After Dark Tour by Nike is a global race series creating safe spaces for women to run at night

Polarised Belief Markets

In environments defined by infinite choice and algorithmic individualisation, communities offer orientation.

For brands, the opportunity lies in creating spaces where consumers can participate, affiliate and locate themselves within shared cultural meaning. But as identity ecosystems deepen, brands must balance belonging with openness. Systems that become too closed risk reinforcing separation rather than connection.

The manosphere offers a clear illustration of the latter. As showcased in the Netflix documentary Louis Theroux: Inside the Manosphere, influencers within these networks promote heath supplements, fitness regimes, ‘university’ courses and financial advice aligned with a specific world view, creating vertically integrated marketplaces embedded within ‘community’ discourse.

Fandom offers a more expansive model. As Andi Davids of Bulletproof explains: ‘Sport continues to offer a powerful sense of belonging in an unpredictable world, grounded in shared values, rules and collective identity.’ Through rituals, symbols and shared experiences, communities built around sport, music and gaming create scalable systems of belonging that remain porous rather than exclusionary.

In this context, fandom will emerge as a stabilising layer within the discovery ecosystem, reconnecting audiences through shared identity, participation and cultural continuity.



AI imagery by The Future Laboratory, UK

The Continuous Present

Ana Andjelic, author of The Sociology of Business, describes discovery as unfolding within a ‘continuous present’, where moments appear and disappear in rapid succession, producing fleeting flashes of attention rather than lasting engagement.

Rather than processing experiences linearly, consumers increasingly navigate culture through fragments that register subconsciously before moving on. For brands, this shifts the challenge from gaining attention to controlling rhythm – deciding how experiences unfold, repeat and accumulate meaning over time.

Behaviours such as watching content at double speed demonstrate how pace is already shaping discovery, compressing consumption into rapid cycles of encounter, dismissal and return.

In environments defined by constant stimulation, moments that slow, repeat or create anticipation may feel more memorable than continuous flow.

Here, the opportunity lies in shaping cadence rather than maximising volume. Brands can differentiate through pacing – deciding when to accelerate, pause or interrupt the rhythm of discovery. Rituals, episodic storytelling and intentional repetition can create temporal anchors that help audiences build familiarity over time rather than consume endlessly without retention.

As Leila Fataar of Platform13 suggests, what endures is the ability to retain meaning in fragments. As discovery accelerates into a continuous present, brands should seek to manage pace using rhythm, repetition and pauses to build meaning over time.

> ‘Everything is happening simultaneously – the event we are experiencing and the social media coverage of it and commentary on it’
>
> *Ana Andjelic, global brand executive and author, The Sociology of Business*

Strategic Implications

Amid fragmented attention and continuous discovery, these strategic implications define how brands can build recognition, hold attention and create systems that drive sustained engagement and cultural relevance

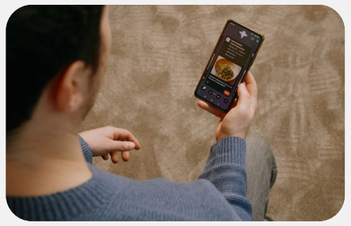


AI imagery by The Future Laboratory, UK

Designing for *Continuous Discovery*

As discovery becomes more continuous, conversational and community-led, brands must create reasons to pause, participate and return. This means designing moments that balance recognition with surprise, digital fluency with emotional depth and relevance with real-time cultural connection.

Just Eat



Build distinctive conversational identity with emotional nuance

Roomies

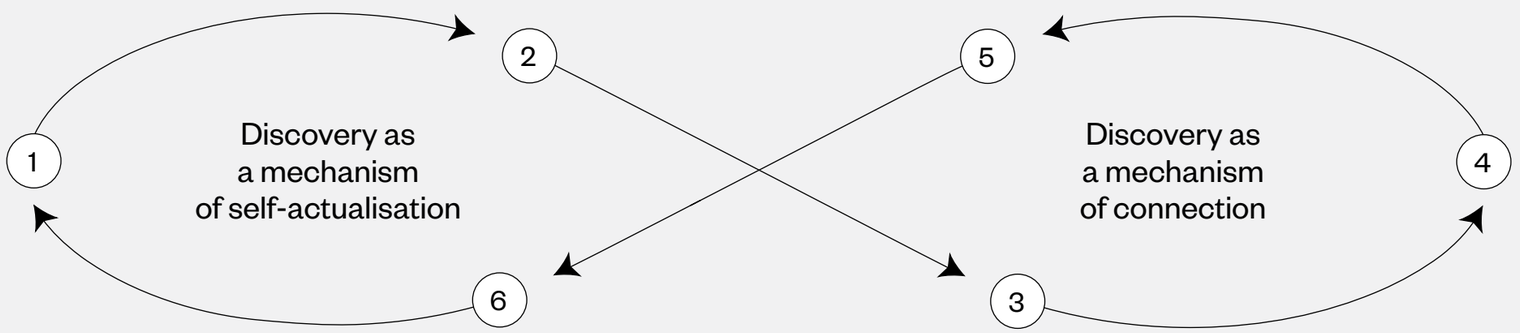


Build narrative worlds that consumers want to return to repeatedly

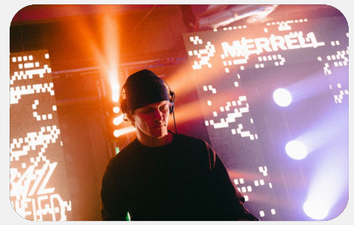
Dove



Introduce moments of surprise and intentional friction

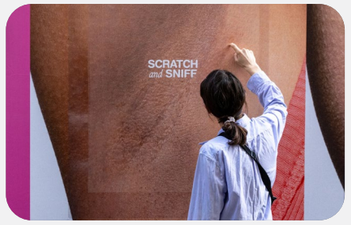


Merrell



Create time-bound experiences for real-time engagement

Billie



Design localised, participatory and sensory-rich experiences

Peachy Den



Participate meaningfully and co-create with communities

Strategic Actions



Burger King's Finished campaign, UK

Design for fragmented recall

Build recognisable brand signals that hold meaning across fragmented entry points, enabling discovery through recognition and belonging even in brief, decontextualised or out-of-sequence encounters.



Brutalist Pink by Yont Studio, Berlin

Sound as wayfinder

Treat sound as a navigational layer across products, platforms and spaces. Develop adaptive soundscapes and sonic identities that guide attention and shape emotional response in real time.



Oatly Bike Thru. Photography by Bob Jeusette, The Netherlands

Entertainment-focused entry points

Build fandom-driven, personality-led and participatory formats that create multiple routes into discovery, transforming engagement into an ongoing system of return, relevance and cultural participation.

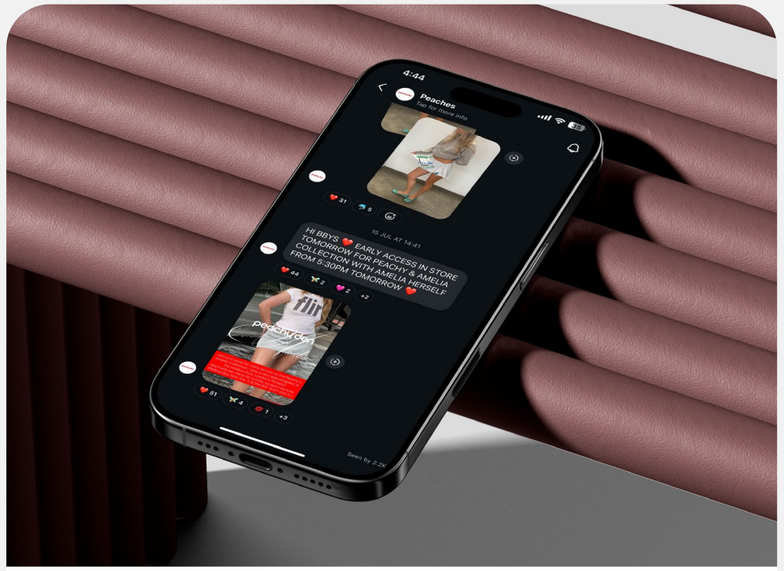
Thought-starters



Phone Break by VML Czechia for KitKat, Czechia

Repeat with resonance

How can your brand build recognition while ensuring meaning evolves, avoiding stagnation within repetitive, algorithmically reinforced discovery systems?



Peaches Instagram broadcast by Peachy Den, UK

Cultural contribution

What does your brand contribute to the communities shaping its discovery and how does it create cultural value beyond performative presence?



How Did They Do It? by Pinterest

Pause power

How can your brand design moments that deliver value in the pause, giving audiences reason to slow down, engage and form meaning within an otherwise accelerated, continuous flow?

Methodology : **Overview**

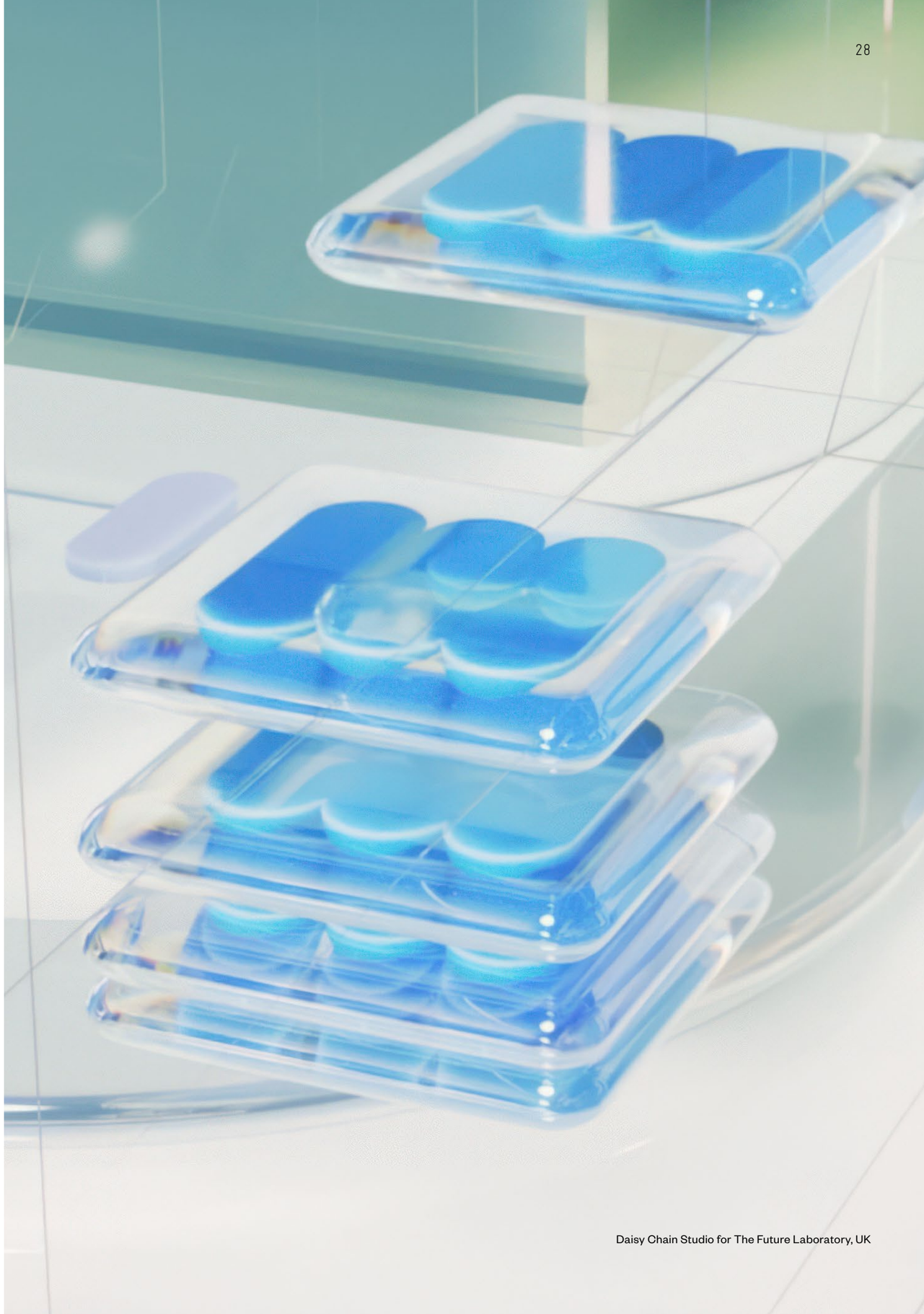
Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all of their decisions about future risk within a brand, consumer or organisational context that is **provable, practical** and **minimises uncertainty**.

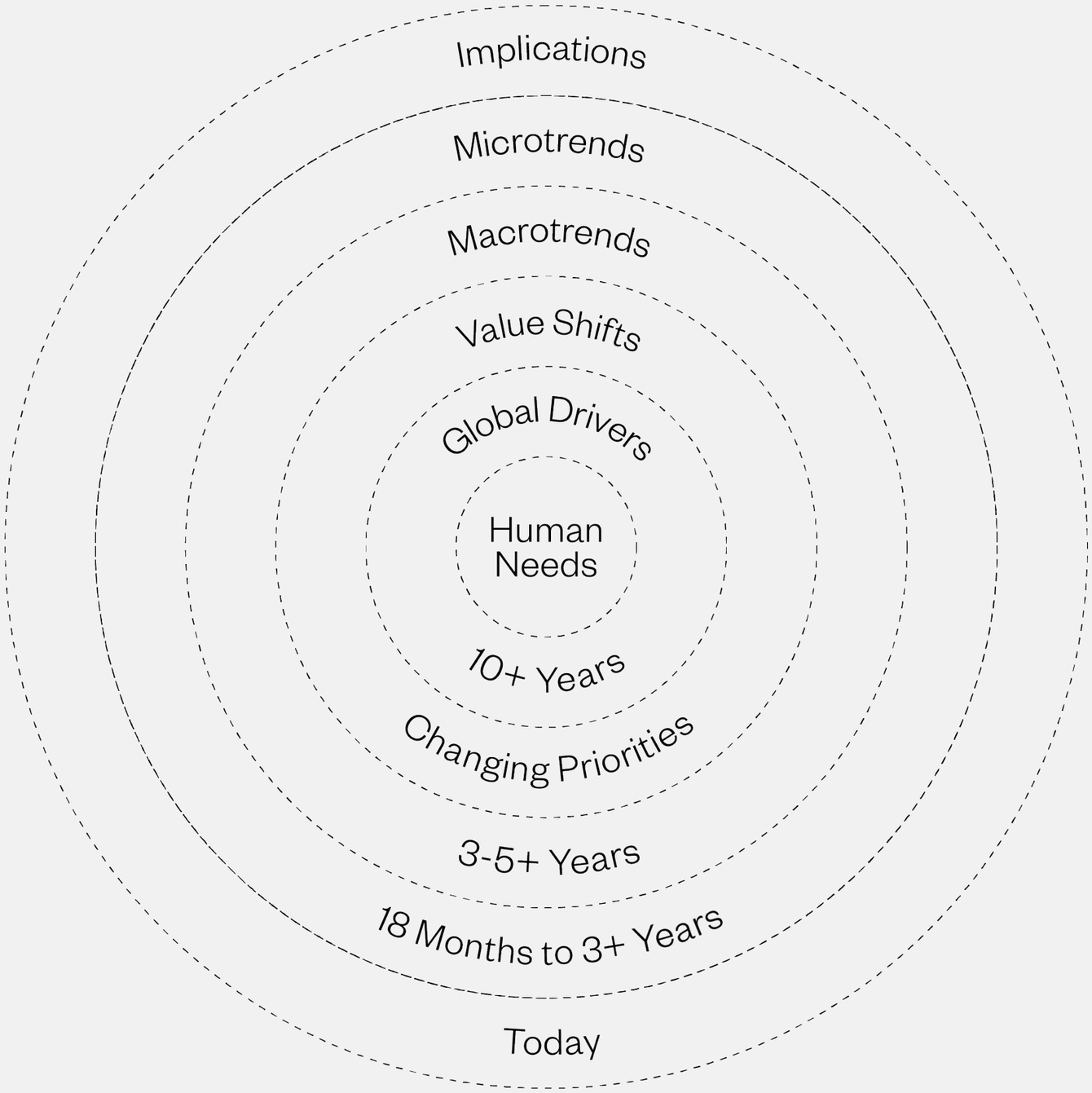
We do this by understanding the influence of **six global drivers** causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging **macrotrends** and **microtrends**, and ascertain what their implications are for the future landscape.



Daisy Chain Studio for The Future Laboratory, UK



The Future Laboratory's proprietary foresight methodology

Methodology : **Foresight Process**

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-years+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

Methodology : **Global Drivers**



Accelerating Technologies

For billions of people around the world, technology has become enmeshed with their humanity – often clashing as we adjust to this new Synthocene Era. Adoption and innovation continue to accelerate, specifically AI, and increasingly, quantum technology.



Climate Crisis and Resource Scarcity

We are at a climate tipping point, with increasing disruption and devastation across the globe. Urgency has turned into emergency, existentially threatening humanity and industry. But a growing sense of pragmatism over doomerism is clashing with industry roll-backs on sustainability commitments.



Evolving Demographics

Over the next decade the shape of our global population will change dramatically. Global economic instability due to falling fertility rates and ageing populations in some regions may be rebalanced by a growing youth workforce in others – with far-reaching repercussions for societies and industries.



Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. The deterioration hinges on the increasing fragility and fragmentation of social, political and environmental ideologies, driving factions into isolated silos and societal polarisation, with apathy and misinformation clouding the way forward.



Micro-globalisation

The liberalised world we live in is inextricably interconnected but it has left us in a state of co-dependency rather than cooperation. Without equitable alignment, resilience may never come from an integrated and interdependent global economy, championing a renewal of localism and national pride.

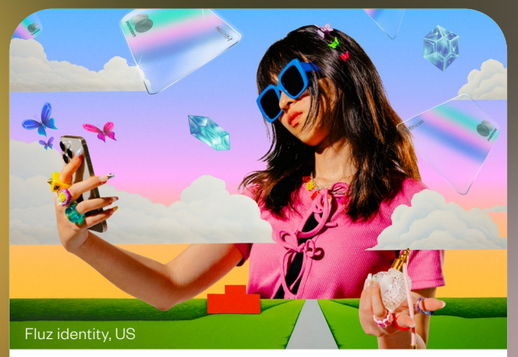


Urbanising World

Despite the repercussions of a global pandemic, cities remain the epicentres of society. Priorities for living, working and playing in these urban environments are being redefined, with liveability, connectivity, sustainability and health and wellbeing becoming expectations rather than aspirations.

Access this report and our full research library by partnering with us

Read our latest macrotrend reports:



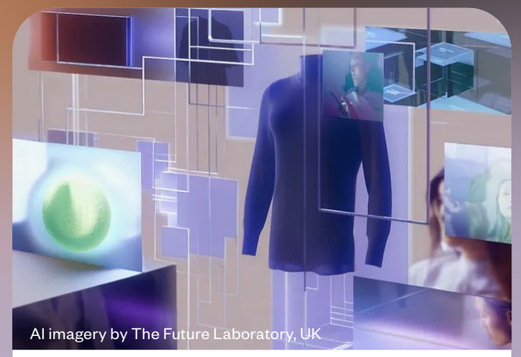
New Codes of Value

In this new era of scarcity, richness is expressed through rituals, and abundance is found in regenerative pursuits and deeper connections. New codes of value are emerging around connection, care and human flourishing.



Residential Retail

With hybrid working becoming the new normal, global retail footfall in decline and the loss of third spaces, the home is shifting from a fundamental comfort and security shelter to a dynamic commercial hub bubbling with retail innovations.



EQ-Commerce

Innovative retailers are using technology to create intelligent, empathetic commerce journeys – where every touchpoint is a learning opportunity and artificial intelligence caters for customers' idiosyncratic needs at scale.

Combine your access with direct input from our future experts, delivering our intelligence to your business in a range of formats, from on-demand presentations to strategic workshops and bespoke reports.

Get in touch to unlock your future consumer today.

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