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TREND REPORT

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REACH OUT TO US

WHAT'S CHANGING THE LANDSCAPE?

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PHYSICAL AI

WHEN AI GETS A BODY

1

What is happening?

AI is stepping out of the cloud and into the real world. It's driving cars, sorting packages, serving coffee, and walking on factory floors.

Robots aren't just automated machines anymore; they're powered by adaptive AI models that perceive, decide, and act in real time.

The global robotics market is projected to surpass **\$200 BILLION** by 2030, with double-digit annual growth driven by AI integration.

(IFR industry estimates)

2

Why now?

The following three factors have come together:

1. AI models got smarter.
2. Sensors got cheaper.
3. Computers got small enough to live on device.



Electric Atlas, Boston Dynamics' fully electric humanoid robot.

Brand Case **amazon**

Amazon's invisible workforce

Inside Amazon warehouses, more than 350,000 robots glide along aisles, carrying shelves, sorting parcels and moving inventory across floors with pinpoint accuracy. Each robot is guided by AI that constantly monitors traffic, predicts movement, and coordinates with hundreds of others to avoid collisions and optimise efficiency.

The scale and speed of these fleets show how Physical AI can shape supply chains and customer experiences behind the scenes.





Brand Case

Waymo: We can trust autonomous AI

Waymo is operating fully driverless ride-hailing services at commercial scale in Phoenix and San Francisco, **completing hundreds of thousands of trips without a human behind the wheel.**

The car's system handles the full driving task within mapped urban zones using LiDAR (light detection technology), radar and real-time AI perception.

As of 2026, Waymo has also begun expanding beyond the U.S., including testing and partnerships in the UK as the government accelerates its self-driving car framework ahead of nationwide rollout in the coming years.



Happening now

Kung-Fu Robots? They're here.

During the 2026 Spring Festival Gala, humanoid robots from China's own Unitree Robotics performed complex, fully synchronised routines, executing kung fu-inspired sequences, controlled spins and clean backflips in front of one of the largest live TV audiences in the world.

Precision movement like that requires real-time perception, joint coordination and dynamic balance adjustment, meaning the AI is constantly recalculating against gravity, timing and spatial awareness. Unitree's robots embodied intelligence that can move through space with confidence, and increasingly... With personality.



UNITREE

What does this mean for merch?

Physical AI will still need branding, which opens up a world of possibilities for branded merchandise.

Think:

- Robot demo days at brand events
- Branded drone activations
- Limited-edition hardware accessories
- AI-coded wearables tied to movement, robotics, engineering culture

What does this mean for brands?

The brands that define the personality of physical AI early will own that emotional territory long-term.

For years, AI was an invisible infrastructure (recommendation engines, algorithms, optimization systems). Now, it rolls up to your house.

Brands must think about how autonomous systems feel. Are they friendly? Human-like? Cold? Efficient?

Our Prediction

By 2030, interacting with a robot in retail or hospitality will feel as normal as tapping a contactless card.



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**KICK
AND
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THE AI GATEKEEPER

1

What is happening?

AI is the new starting point of the consumer journey. Instead of searching on Google or browsing brand websites, people increasingly ask AI tools like ChatGPT for recommendations, comparisons, and advice before making a purchase.

The traditional funnel (search, compare, decide) is collapsing into one conversational step where AI summarizes options and suggests only a handful of brands.

37%

of consumers now start their product searches with AI tools instead of traditional search engines like Google as of 2025.

2

Why now?

AI removes the friction by delivering quick, summarized answers and curated recommendations.

For digital-native generations used to instant responses, asking an AI is simply faster than scrolling through dozens of search results: for the perfect review.



Happening Now

Gen-Z is using AI chatbots as their personal stylist

Gen Z, in particular, are asking LLMs, such as ChatGPT and Claude for outfit ideas, product recommendations, or even complete shopping lists before they ever visit a website.

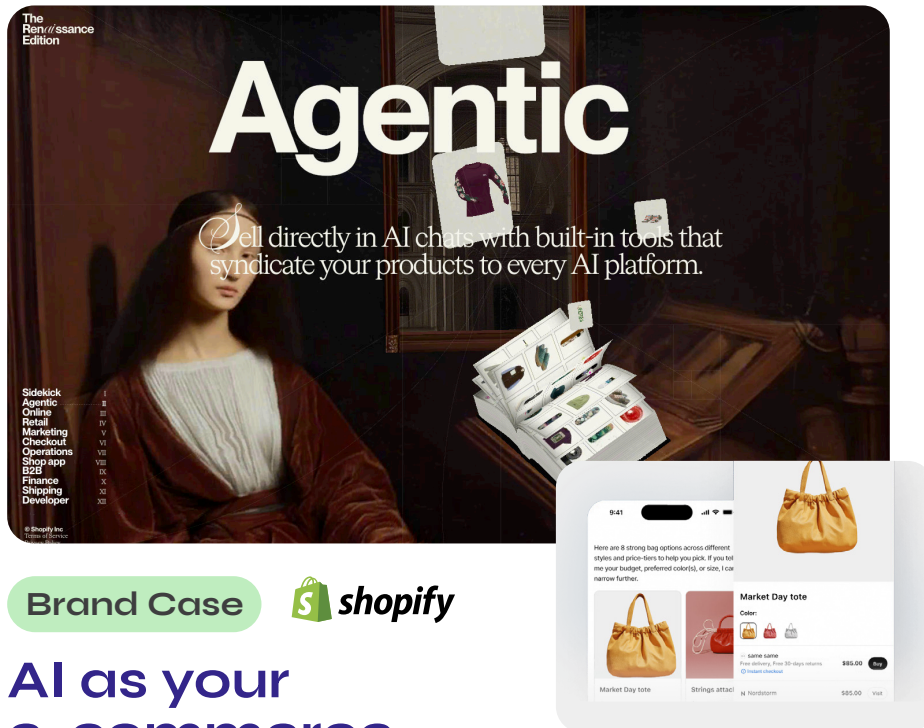
Brands that aren't showing up in AI suggestions risk being invisible, while those that do get a golden shortcut straight to a consumer's consideration set. **Everything from tech gadgets to home decor is now discovered through chat, turning AI into the new storefront.**

Brand Strategy

How can you make sure your brand is AI-chat proof?

For brands, this means “a higher demand for strategic clarity and positioning services to support multi-layered visibility; think consistent language, distinctive tones and culturally resonant moments,” says Holly Brunskill, managing partner at B The Communications Agency.





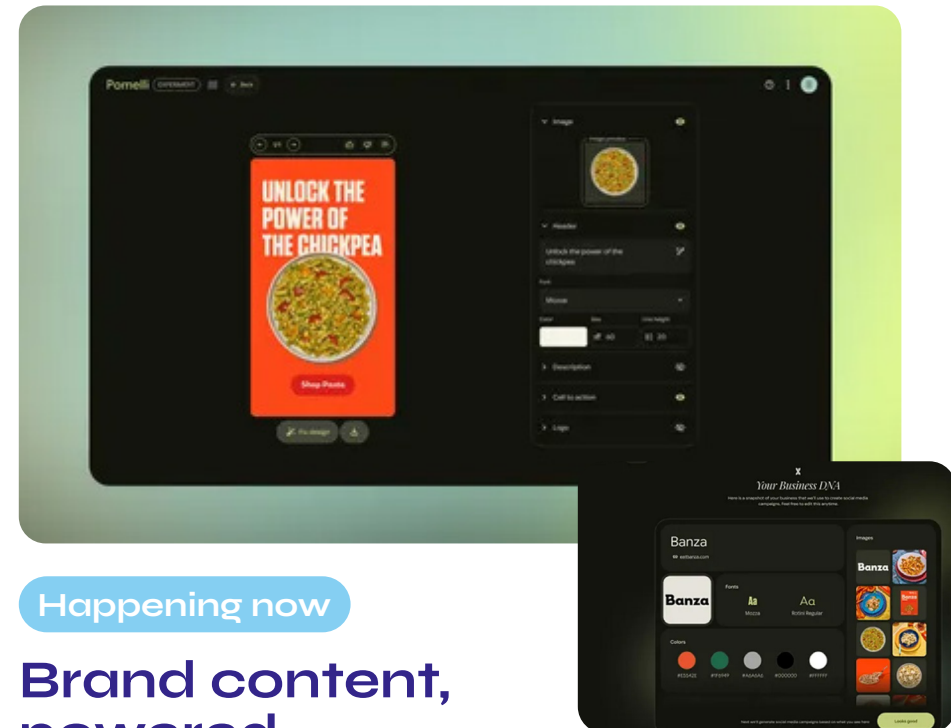
Brand Case



AI as your e-commerce storefront

Shopify's new agentic storefronts let brands sell directly inside AI channels like ChatGPT, Google AI Mode, Gemini, and Microsoft Copilot. **Customers can discover products through AI and can even complete the purchase without ever leaving the conversation.**

Even if you don't activate direct selling, Shopify lets your products remain discoverable, simply redirecting shoppers to your online store. It's a first glimpse at a world where AI isn't just guiding discovery, it's becoming the storefront itself.



Happening now

Brand content, powered by AI

As of early 2026, Google developed Pomelli, a new AI tool. **Pomelli helps brands create studio-quality marketing assets in minutes.** From lifestyle photos to product shots, Pomelli generates visuals that are on-brand, saving time and resources traditionally spent on photoshoots, editing, and manpower.

AI is now moving earlier in the selling journey, helping brands produce the content that drives engagement and conversions.

What about merch?

The power of real remains.

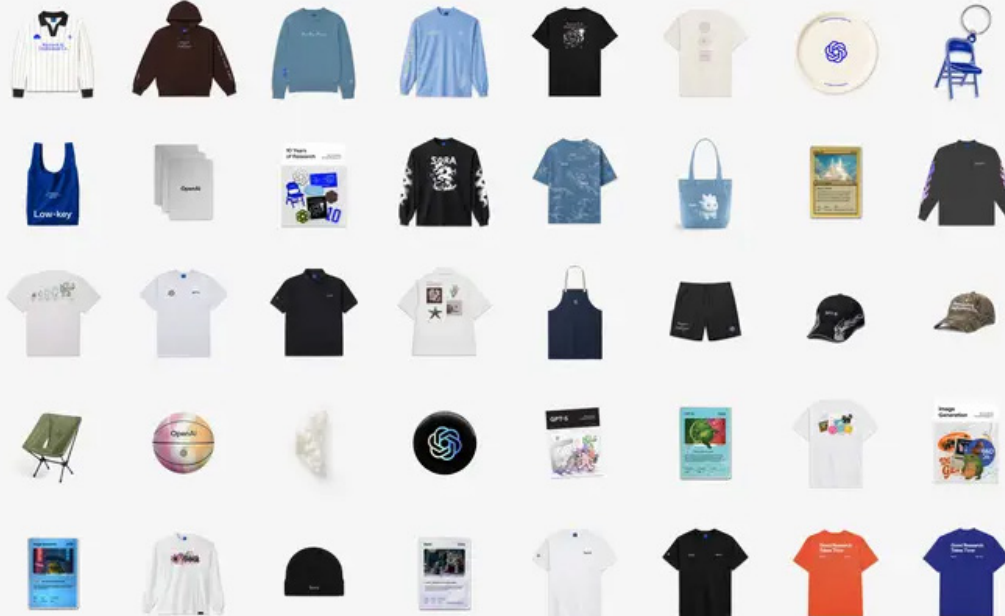
Physical products and branded merchandise gain importance as real proof points in a world where the algorithm is king.

When discovery happens through AI summaries rather than browsing, memorable real-world experience (events, merch, and shareable objects) become powerful tools of organic conversation, reviews, and potentially, data that AI tools will later reference.

OpenAI Supply Co.

Employee Login

10 Year
Sora II
GPT-5
Image Gen.
Sora I
OpenAI
IOI Competition
Strawberry



Brand Case



OpenAI, DevDays & Community Drops

Even OpenAI understands that AI alone isn't enough. At its DevDay event in 2025, limited hoodies and caps quickly became cultural currency within the tech community; not sold through ads, but earned through presence. In a company building the most advanced digital tools, the most desired objects were physical.

Even the architects of AI know the future of tech still needs something tangible, wearable, and real.

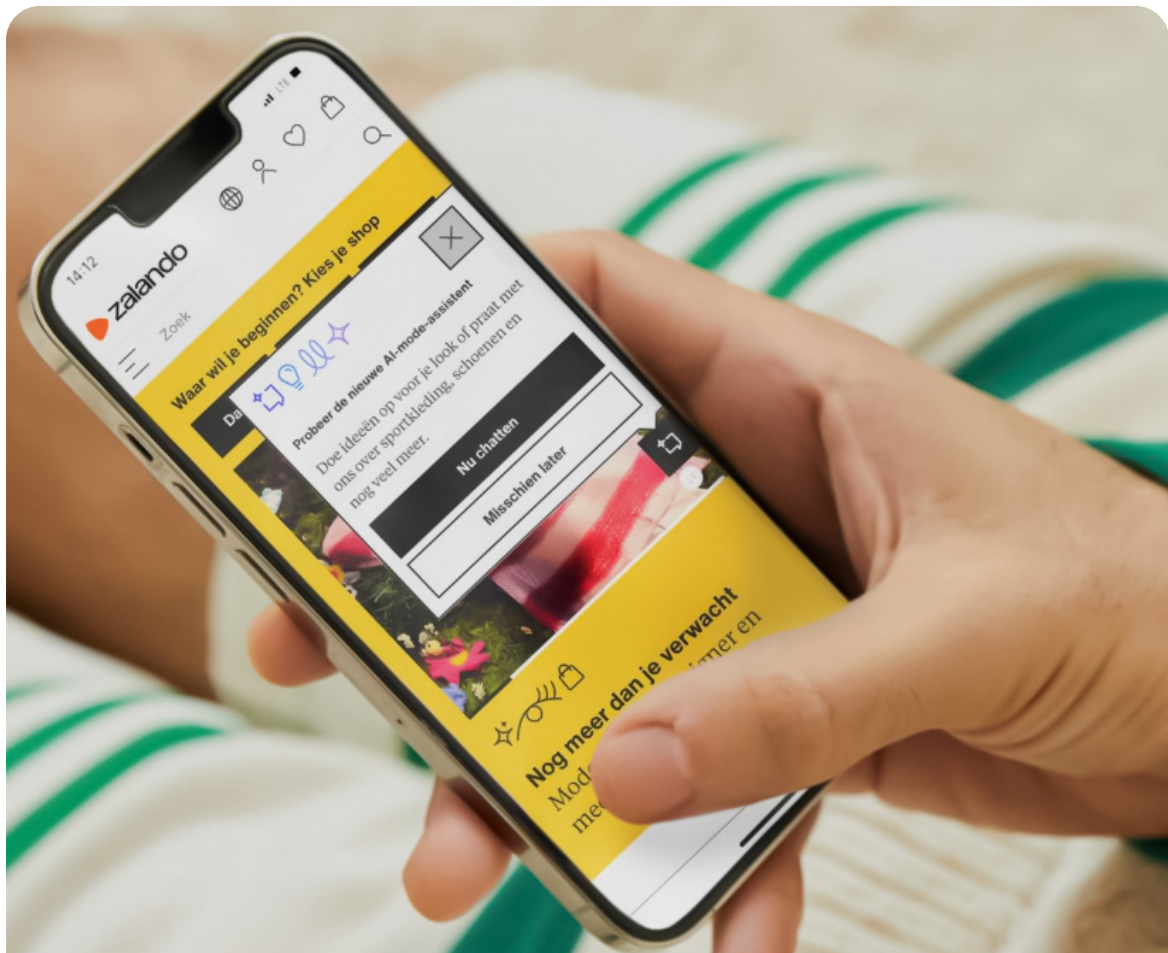
What does this mean for brands?

If an AI assistant recommends only three products, and yours isn't mentioned, it will never enter the consumer's consideration set.

Content is king: Brands now need to be "AI-readable," and easily understood by large language models that scrape the internet.

Our Prediction

The ultimate brand death sentence: Brands that don't get recommended by AI large language-models.



AI GOVERNANCE & SECURITY:

WHO CONTROLS INTELLIGENCE?

1

What is happening?

As AI becomes more autonomous, the conversation is shifting from abilities to control.

We're seeing a rapid rise in AI governance frameworks, compliance standards, and model auditing. **The question is no longer "Can we build it?, it's "How do we prevent it from going rogue?".** Security is becoming AI's shadow industry.

90%

of organisations say AI-driven cyber threats are now a top concern in security strategy

(WEF 2025–2026 cybersecurity reporting).

2

Why now?

AI is growing in more sensitive industries: such as finance, healthcare, defence, elections, media. **The margin for error is shrinking dramatically.**

At the same time, generative AI introduced deepfakes, automated phishing, misinformation, and model exploitation.

It's normal that governments stepped in. The EU formally adopted the EU AI Act, the first comprehensive AI regulation globally, categorising AI systems by risk level and imposing strict compliance rules on high-risk applications.



Discover how safe and secure AI business practices can enhance performance and drive impact [Get the e-book](#)

X

Responsible AI at Microsoft

Explore the tools, practices, and policies we've created to uphold our responsible AI principles.

[2025 RAI Transparency Report](#)
[Our commitment](#)
[News and insights](#)
[Business resources](#)
[Tools](#)
[Advancing policy](#)
[FAQ](#)

Responsible AI at Microsoft

Our commitment to responsible AI

At Microsoft we're committed to responsibly designing, building, and releasing AI technologies—keeping humans at the center and guided by our principles. We've distilled our commitment into six core values:

- ✓ Fairness
- ✓ Reliability and safety
- ✓ Privacy and security
- ✓ Transparency
- ✓ Accountability
- ✓ Inclusiveness

[See our principles](#)


Brand Case



Microsoft: Trust as infrastructure

Microsoft is positioning responsibility as part of its core product.

The company has embedded responsible AI standards directly into its enterprise ecosystem, from Azure integrations to published transparency reports.

It has also built an entire public-facing hub of resources, news and insights dedicated to keeping users informed about how its AI systems are developed and governed. This level of openness goes beyond PR, and into brand strategy. In an era of murky AI ethics, being outspoken and thorough about your AI practices is quickly becoming bare-minimum brand behaviour.

AI Security: Happening now



“Who controls the guardrails: governments or the labs?”

Anthropic vs. The US Pentagon

In March 2026, Anthropic sued the U.S. Department of Defense after reportedly being excluded from contracts for refusing to relax safety guardrails around military AI applications. The message was clear: not all model makers are willing to compromise on deployment boundaries. What used to be an internal ethics debate is now a public legal battle. AI governance is no longer theoretical. It's geopolitical.

Source: Reuters, March 2026



“Powerful models require proportional restraint.”

Responsible Scaling Goes Version 3.0

Anthropic released Version 3.0 of its Responsible Scaling Policy, outlining how increasingly powerful models will be evaluated, stress-tested and restricted if risk thresholds are crossed. The document reads less like marketing and more like a safety manual for the future. It formalises internal red-teaming, threat modelling and catastrophic risk mitigation. Self-governance is becoming structured, published and measurable.

Source: Anthropic, Responsible Scaling Policy v3.0, 2026

AI Security: Happening now



“AI safety is now worth public money.”

The UK Funds AI Safety Like Infrastructure

The UK government announced a £27 million expansion of its AI Security Institute, with support from OpenAI and Microsoft. The aim is to strengthen alignment research, model evaluation and risk testing at a national level. AI safety is no longer a side conversation in tech circles. It's receiving state-level funding and cross-industry collaboration. Governance is becoming infrastructure.

Source: Computer Weekly, 2026



“AI compliance is the new GDPR.”

The EU AI Act Enters Enforcement Mode

The EU AI Act has shifted from legislation to enforcement phase across member states in 2026. High-risk AI systems now face strict compliance obligations, with penalties reaching up to 7% of global annual turnover. This is the first comprehensive AI regulation of its scale globally. For brands operating in Europe, AI governance is no longer optional positioning. It is legal exposure.

Source: EU Parliament updates, 2026

What does this mean for brands?

AI governance must become a central part of brand storytelling, not just legal fine print.

Trust is what makes the difference. If AI is powering your product, customers will want to know it. Who trained it? How biased is it? Who audits it? Can it be manipulated?

Our Prediction

By 2030, “AI compliance certified” or “Made with AI”, will function like organic labels on food packaging.



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HOW ARE BRANDS AND CONSUMERS REACTING?

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GOING ANALOGUE

HUMAN-CENTERED CONNECTIONS

1

What is happening?

Consumers are increasingly valuing real-world experiences and human connections over the cheap thrills of over-consumption.

With that said, consumers are seeking out spaces that offer room for authentic connection with like-minded peers. Read = Away from their screens, and with often analogue activities.

84%

of interest-based event attendees have developed close friendships through these gatherings.

2

Why now?

Fatigue from digital saturation is at an all time high. This fatigue is exasperated by the rise of AI content (slop). Moreover, consumer suspicion has also increased. Audiences no longer blindly trust brands. Instead, they seek out experiences that reaffirm their value systems and fill their social tanks.



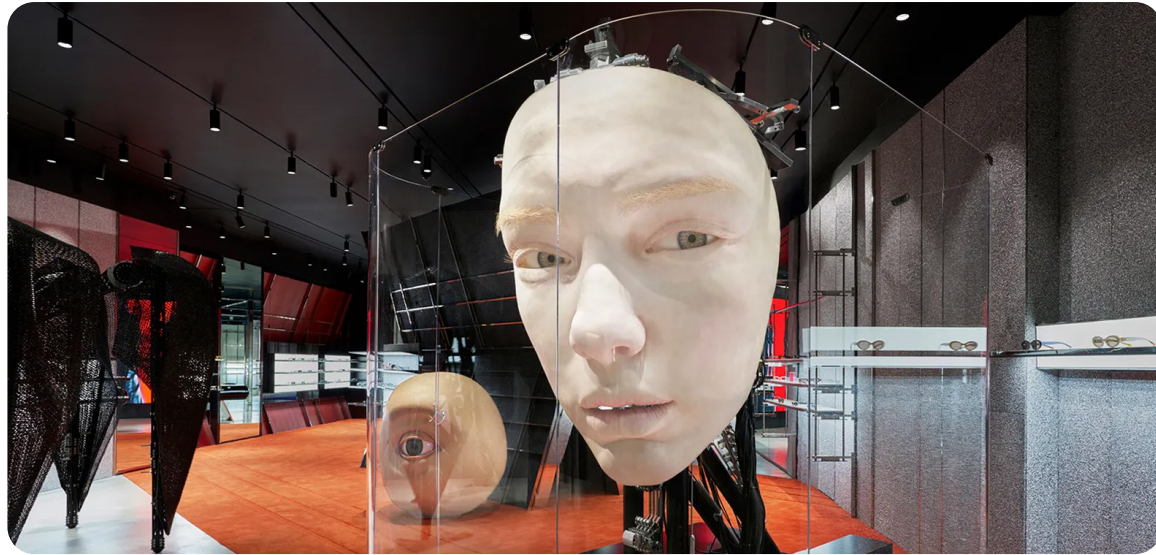
Happening now

The analogue bag

Gen Z is swapping smartphones for crosswords and sketchbooks – turning the regular bags into a tool for offline living. So-called analogue bags, filled with activities such as, knitting, novels and journals, have become the unexpected accessory of the season.

Similar to a prep bag, the idea is that the bag or basket should contain the essentials needed to remain offline for as long as possible.

(The Guardian, 2026).



GENTLE MONSTER

Brand Case

Gentle Monster: Retail As Cultural Immersion

Gentle Monster, an eyewear brand from Korea, designs its boutiques as large-scale art installations rather than traditional stores. Sculptural forms, kinetic pieces, and conceptual scenography turn retail into a gallery-like experience. The eyewear becomes part of a broader cultural narrative instead of the sole focus.

In an era of digital fatigue, the brand offers a fourth-space environment where visiting the store feels like participating in culture, not just a transaction.

Fostering (brand) connection as ultimate luxury



Brand Case

Chanel: Building Cultural Infrastructure

In late 2025, Chanel opened mainland China's first public library dedicated to contemporary art, housing over 50,000 books. The space positions the brand as a long-term patron of culture rather than a short-term marketer.

By investing in knowledge and public access, Chanel embeds itself into the creative lives of its community. It reflects a shift toward brands creating physical spaces that deliver intellectual and cultural value beyond the screen.

It's all about commu- nity.

MIU MIU

Miu Miu Uno Card Set, \$600



BOTTEGA VENETA

Bottega Veneta Jenga set,
\$6,000

Brand Case

Miu Miu & Bottega Veneta: Games That Bring People Together

Miu Miu's luxury UNO deck and Bottega Veneta's elevated Jenga reinterpret familiar games as high-design objects. These pieces are designed to be used in living rooms, gatherings, and shared rituals rather than displayed behind glass.

They transform merch into a tool for offline interaction at a time when consumers crave real connection. In the rise of fourth spaces, even a game becomes a way of reinforcing brand belonging.



Brand Case

Capture it like it's 1999

In a culture craving the real, the instax mini Evo Cinema feels perfectly timed. With its cinematic-inspired filters and retro design, it transforms everyday gatherings into keepsakes.

The device has a dial that lets you shoot like it's the year 1930, 1940, all the way to 2020. It's a social catalyst; designed for dinners, parties, and fourth-space moments where memories deserve more than a cloud upload.



Happening now

Gen Z trades iPhones for iPods
Music device sees revival

Even music is going analogue. Enough with streaming, consumers want to own their music. According to Axios, searches for the Classic and the Nano were up 25% and 20% respectively, between January and October of 2025 compared to 2024. Additionally, Since 2022, total sales of refurbished iPods are up an average of 15.6% per year.

What does this mean for brands?

Brands must contribute value beyond the screen, showing up in authentic ways in their consumers' lives.

Brands need to be present off-line in a multi-layered approach that aligns their brand values with their consumers' own interests and values.

Our Prediction

Brands will invest less in performance marketing, and more in permanent or semi-permanent “fourth spaces;” hybrid cultural spaces where workshops, listening sessions and product drops merge.



© Kick And Rush

THE POWER OF KNOW:

KNOWLEDGE & AUTHENTICITY AS A STATUS SIGNAL

1

What is happening?

Knowledge, as well as knowledge sharing, is becoming the real status signal. It's simple, if you have the time to be away from your screen and pursue a hobby or niche interest, then you have the privilege of choosing life over a screen. Consequently, brands have caught on, learning to show up in authentic, off-line experiences, meeting their consumers where they're at: Living their lives.

90%

of Gen-Z enjoy dining at communal tables, as opposed to 60% of Boomers.

(Resy)

2

Why now?

In a dire job market, increasing inflation, and rising geopolitical tensions, time becomes a social capital – And one needs time to be in the know: Whether to build a craft-skill, to partake in communities for knowledge sharing, or merely to spend enough time learning & understanding what's "in".



timeleft.

Platforms like Timeleft organize curated dinners with strangers, focused around specific conversation themes.

Brands as sponsors of culture



Brand Case **MIU MIU**

Miu Miu's Literary Club & Intellectual Femininity

Miu Miu launched the Miu Miu Literary Club, hosting offline reading groups and discussions around female authors and cultural themes.

Miu Miu leveraged knowledge as a status signal, while turning an offline gathering into pure social capital. As a luxury fashion house, Miu Miu stepped outside their expected “fashion” mould, tapping into a fashion-adjacent cultural space: Literature.

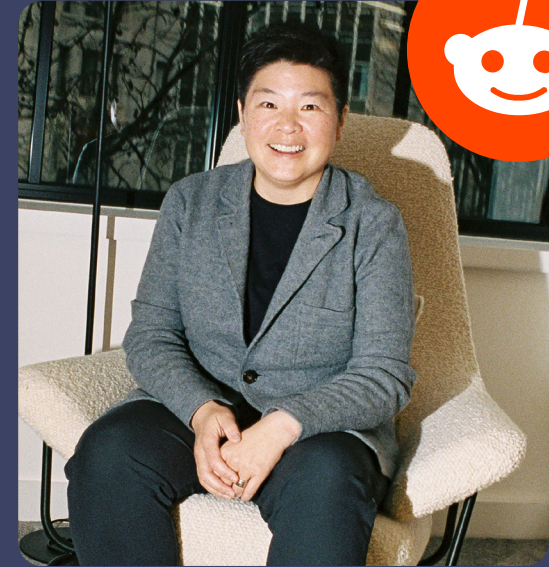


Happening now

Reddit: Where the real discussion happens

Consumers are increasingly turning to reddit for fashion and beauty product research (Beyond the traditional “underground” audience that has traditionally been on the platform).

“Reddit is built for the anonymous user, so the way communities expect brands to come to the table is through **engaging with existing communities and conversations.**” – Jen Wong, Reddit COO



© Kick And Rush



DURACELL®

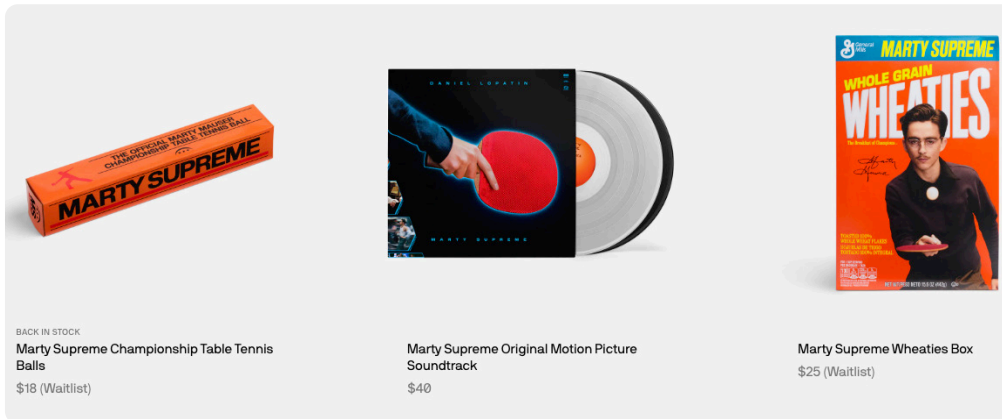
Brand Case

Duracell: An unexpected audience for the KPOP community

Duracell didn't just find fans – it found stans. By tracing TikTok search journeys, the brand uncovered an unexpected connection with the K-pop community, who rely on Duracell to power their glowing light sticks at concerts. What started as a niche discovery has become a powerful new growth audience and a top priority for 2026.

Branded merch = status signal

Movie: Everything, Everywhere, All At Once
Merch Hot Dog Finger Gloves, \$36



© Kick And Rush

Brand Case

A24: Cultural Insider Status as Strategy

A24 built a hyper-curated cultural identity around cinema. Their merch shop includes niche zines, scripts, candles inspired by specific films, deep-cut references.

This lets their film-fans use merch as a badge of cultural literacy. **A24 rewards curiosity:** meaning the merch only makes sense to the fans if they're "done their homework", that is, partaking in A24's cinematic universe.

A24



What does this mean for brands?

Brands must break away from their expected molds and show different sides of their brand “personality”.

To do this, brands must find their adjacent spaces (cultural moments, niche communities) that align with their brand identity... And could ultimately bring in new audiences.

Our Prediction

By 2028, brands will compete less on visibility and more on intellectual infrastructure: launching academies, certifications, and community-based learning platforms.



© Kick And Rush

EMOTIONAL ROI:

EMOTIONAL CONNECTION AS THE ULTIMATE BRAND GOAL

1

What is happening?

Brands are no longer competing for attention; they're competing for emotional utility.

In an era of intentional spending, purchases must generate sustained value, not just momentary stimulation. Brands are expected to help people express, regulate or engage with their emotions and identities beyond a superficial, just-a-consumer level. This can be via tools, rituals, physical spaces or branding.

2

Why now?

As consumers become more selective with where they spend their money, they want to engage with brands that provide value beyond the moment.

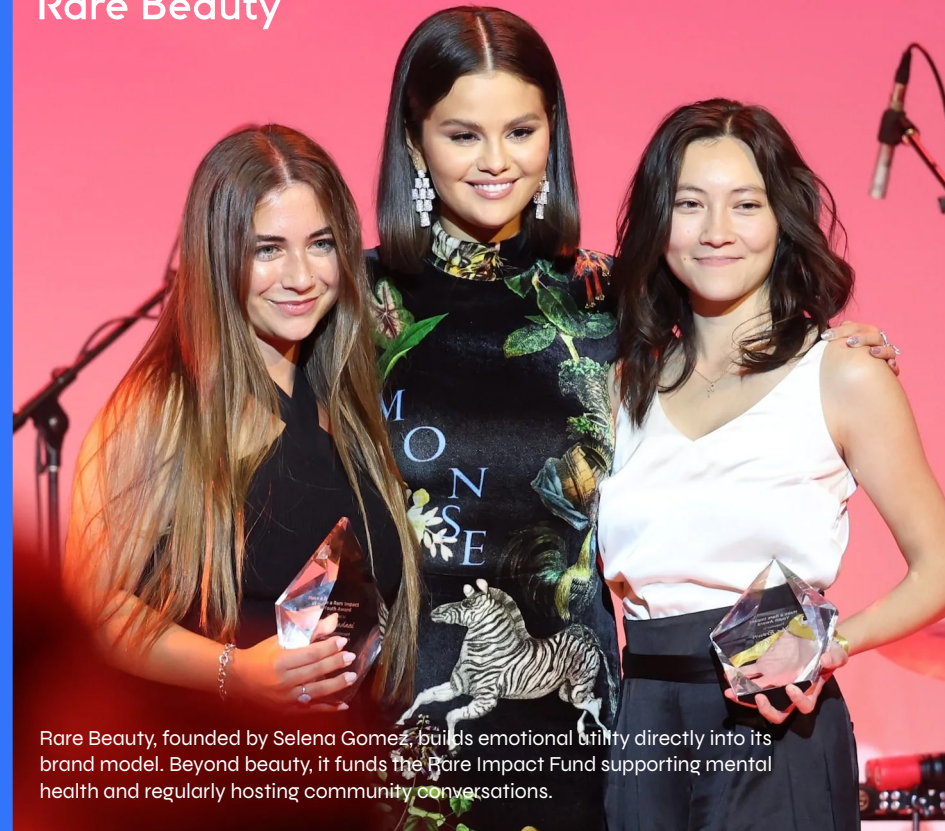
People are no longer satisfied with the bump of serotonin obtained from a "little-treat" but seek longer-lasting value that also justifies the price of the item/service.

62%

of consumers say they have and emotional connection to the brands they buy from the most.

(McKinsey, 2026)

Rare Beauty



Rare Beauty, founded by Selena Gomez, builds emotional utility directly into its brand model. Beyond beauty, it funds the Rare Impact Fund supporting mental health and regularly hosting community conversations.

alo

Brand Case

alo

Alo Yoga: Wellness
Beyond Clothing

Alo Yoga, known for its premium yoga apparel & athleisure, launched Alo Yoga Wellness Club: a subscription-based digital platform offering thousands of on-demand yoga, fitness and mindfulness classes led by expert instructors. They also host immersive real-world retreats and community experiences around Pilates, mindfulness and self-care.

By moving into both digital and physical wellness spaces, like luxury resorts or local community gatherings, the brand turns everyday routines into sustained emotional engagement. **Alo's ecosystem rewards ongoing participation and personal growth, making members feel seen, supported and connected.**

© Kick And Rush

Branded merch = Instant emotional return

NOTHING

Brand Case

Nothing Technology targeted the right audiences

At a Dior Couture watch party in Los Angeles, fashion students gathered to stream the show together. Hidden under a few seats? \$300 headphones by Nothing. Not for influencers. Not tech for reviewers. For fashion students.

With their avant-garde design language and editorial visual style, Nothing understands that its audience isn't just buying audio equipment; they're buying alignment.

By embedding itself in a fashion ritual and rewarding the very community that fuels the industry, the brand delivered brand recognition.

That's emotional utility in practice: making a niche audience feel seen, relevant, and part of something forward-facing.



© Kick And Rush

What does this mean for brands?

Brands must learn to demonstrate value through payoff, relevance, and community connection.

It goes beyond a visually aesthetic feed or following brand guidelines. It's about how your brand:

- A. Interacts and aligns itself with culture
- B. How brands show they understand their consumer

Our Prediction

Brand loyalty will belong only to those who deliver emotional payoffs. Brands that don't spark real feelings will slowly fade into the background.



© Kick And Rush

SECONDHAND & REPAIR CULTURE: VALUE IS THE NEW LUXURY

1

What is happening?

The consumer landscape is shifting: Ownership no longer means new. Second-hand isn't niche, it's now a key part of how people shop, especially for fashion and luxury. **Resale markets are growing two to three times faster than traditional retail**, and pre-owned goods already make up a significant share of wardrobes in Europe and the US.

At the same time, repair is moving from a fringe ethic to something that consumers actively seek out.

2

Why now?

Several forces have collided in 2025, and they're only intensifying in 2026:

- 1. Economic realities:** With inflation and high prices across the board, buying pre-owned or fixing what you have is practical.
- 2. Sustainability awareness:** A growing proportion of consumers say they prefer second-hand or circular options and expect reparability from products.
- 3. Cultural values shifting:** For younger shoppers (Gen Z especially) consumption is about stories, longevity, and meaning, not just novelty.

60%

of retail shoppers are expected to buy from secondhand resale platforms in 2026.



© Kick And Rush

The global secondhand market is expected to reach **\$317 billion** by 2027.

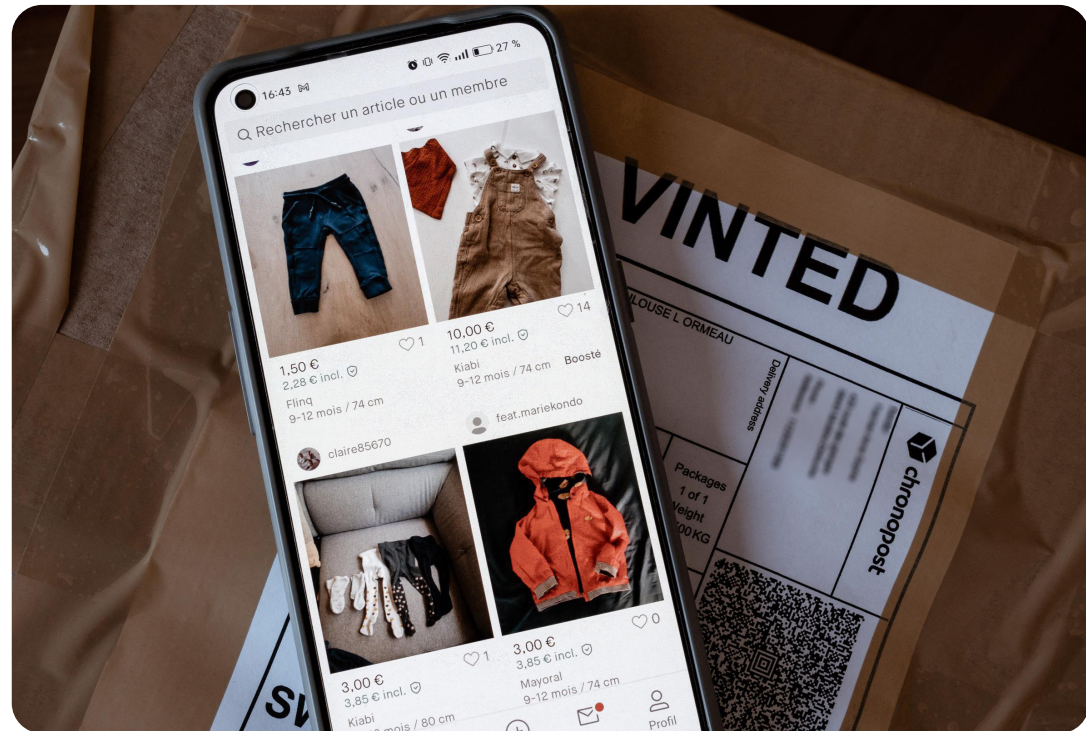
Vinted

Brand Case

Vinted & the democratization of second-hand

In the past 3 years, Vinted has become one of Europe's most powerful fashion platforms, completely redefining what value looks like. Once a peer-to-peer resale app, it's now profitable, expanding into luxury, and posting serious growth; its net profit having grown more than 330% from 2023 to 2024.

For many users, second-hand is no longer occasional; it makes up the majority of their wardrobe. In a market where price sensitivity meets sustainability awareness, Vinted is becoming the default, with Millennials and Gen Z consumers leading the trend.



Secondhand resale is more than just a commercial lever. In 2026, it's also about brand perception.

SELFRIDGES & CO

Brand Case

Selfridges & Raas (Resale-as-a-Service)

U.K. luxury department store Selfridges is rewriting the rules of retail with Reselfridges, its in-house resale platform that lets customers buy and sell pre-owned pieces directly within the brand ecosystem. **Instead of losing shoppers to third-party marketplaces, Selfridges keeps the entire lifecycle in-house, turning resale into a loyalty loop rather than an exit point.**

Their model reframes ownership as temporary and positions the brand as a curator of value over time, not just at the moment of purchase.



Repair as part of the brand ecosystem



Brand Case

Dr. Marten's Café: Doctor's Orders

Dr. Marten's reopened their iconic 90s café in the heart of London, alongside a customization and repair station. The ground floor made from reclaimed wood taken from schools, pubs and music venues, so the creative energy is high.



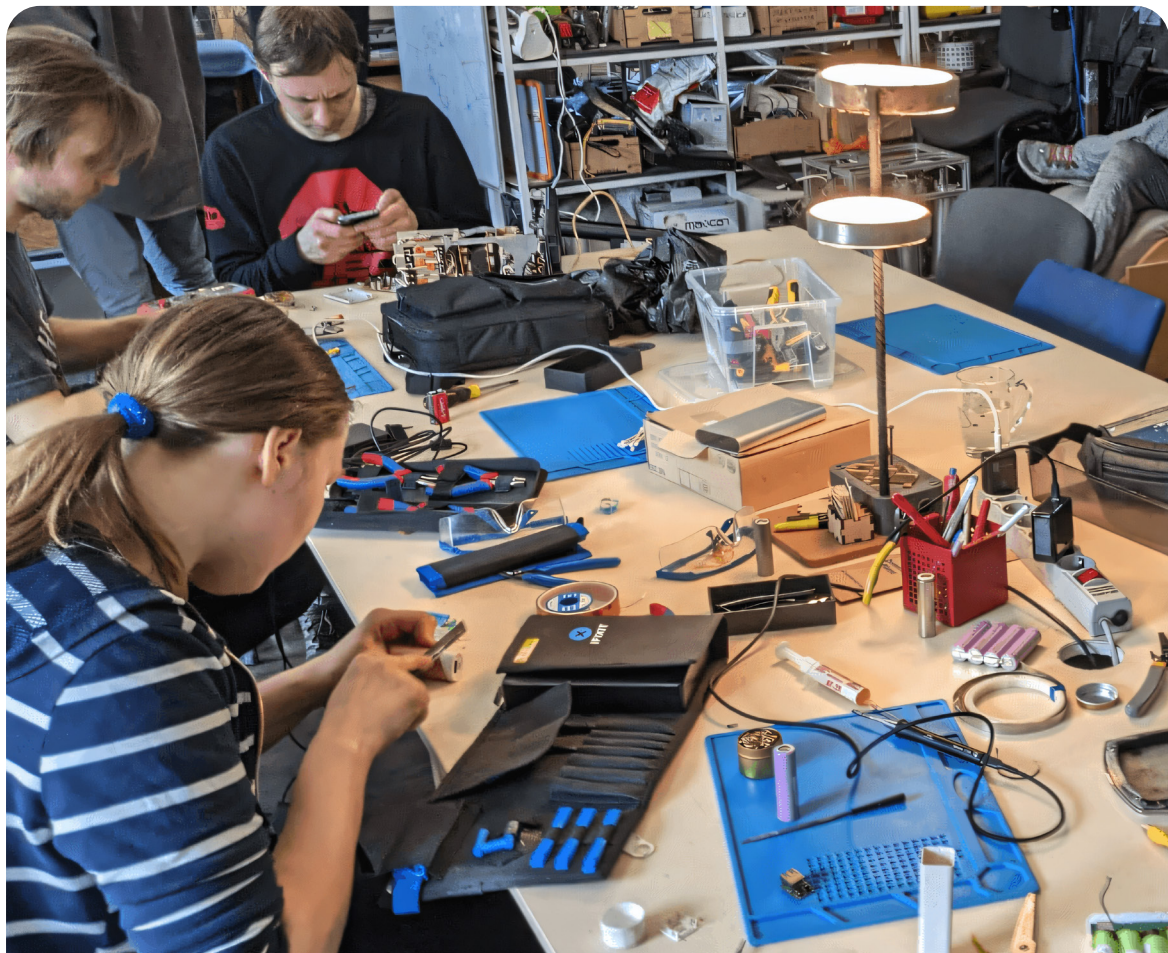
What does this mean for brands?

If a brand doesn't offer their own resale & repair service, consumers will find it elsewhere. That's € you're leaving on the table.

Smart labels are pivoting: some launch official resale programs; others partner with platforms or build repair services. Ignoring this trend means ceding ownership and value capture to third-party players.

Our Prediction

Brands that don't publicly rate, support, or enable repair and resale will lose relevance among younger consumers (and risk having their products valued more when sold second-hand than fresh from the rack).



THE SUBSCRIPTION & MEMBERSHIP ECONOMY

1

What is happening?

Subscriptions have moved far beyond Netflix and SaaS. Physical brands, retailers, media companies, and even luxury players are launching: Paid loyalty tiers, product replenishment subscriptions, members-only drops, VIP experiential access, hybrid digital and physical perks.

Basically, it's paid access to a brand ecosystem. In fact, by 2028, over 50% of mid-to-large consumer brands will operate at least one paid membership or subscription layer.

2

Why now?

Brands crave predictable recurring revenue. Subscriptions also give brands first-party data.

There's also a loyalty crisis: **Customer acquisition costs have increased dramatically, making client retention more valuable than ever.** (Forrester loyalty research). Also, consumers increasingly value convenience, curation and exclusivity.

4X (OVER 435%)

The amount of growth in subscription services in the past decade, far outpacing traditional retail growth.

(Subscription Trade Association)



SEPHORA

Brand Case SEPHORA

Access Is the New Luxury: Sephora's Membership Playbook

In 2025, beauty retailer Sephora expanded its tiered Beauty Insider ecosystem into a true access-driven membership model, layering early product drops, exclusive masterclasses, personalized bundles, and AI-powered recommendations into one continuous relationship.

Members receive priority access to limited collaborations and curated launches, reinforcing urgency and insider status. The strategy increases lifetime value while strengthening emotional connection through events and community integration. Sephora understands that recurring revenue only works when recurring value feels tangible.





Brand Case

Luxury on Demand: Porsche's Subscription Shift

Iconic German automobile manufacturer Porsche has expanded its flexible vehicle subscription model, allowing customers in select markets to switch between models under one bundled monthly fee.

The brand reframed ownership as access, appealing to affluent consumers who prioritize flexibility over permanence. App-based control and short-term commitment removed friction while maintaining exclusivity. This approach turns a €100k product into a dynamic lifestyle service rather than a once-and-done asset. Porsche demonstrates that subscription scales even at the highest price tiers.



Brand Case

Membership as Merch Engine: BLACKPINK's Weverse Strategy

World-phenomenon and K-pop band, BLACKPINK, continues to scale its paid fan membership through Weverse, where official membership tiers unlock exclusive physical merchandise not available to the general public.

Annual fan kits include limited-edition objects, custom packaging, and collectible items that ship only to registered members. **Drops are timed, serialized, and community-driven, reinforcing ritual and exclusivity.** The merchandise is not positioned as product inventory but as access symbols, reinforcing status inside a global fandom.

What does this mean for brands?

Brands must move from seasonal pushes to ongoing engagement loops.

Additionally, recurring income reduces dependence on the “hype cycle,” which consumers are also fatigued of.

Our Prediction

Physical merch will increasingly become tied to tier-based access, rather than one-off campaigns.



KEY TAKEAWAYS:

If you're short on time, here's everything you should remember from this trend report, put neatly in one page.

TREND 1 AI Gets Physical

AI is becoming embodied: Brands must decide how their autonomous systems feel in the real world.

TREND 2 The AI Gatekeeper

If your brand doesn't appear in AI-generated recommendations, it might as well not exist.

TREND 3 The Rise of AI Governance

Trust is now a competitive advantage. Consumers & regulators demand visible, provable AI responsibility.

TREND 4 Going Analogue

Digital fatigue is driving a return to offline experiences. Cultural presence now matters more than online reach.

TREND 5 The Power of Know

Knowledge is the new status symbol: Brands win by acting as patrons of learning, not just sellers.

TREND 6 Emotional ROI

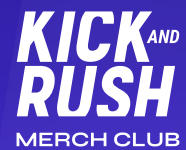
Purchases now require emotional payoff. Brands must create meaning, not just fleeting moments.

TREND 7 Secondhand & Repair culture

Longterm value is the new luxury: Resale and repair are becoming consumer defaults, not alternatives.

TREND 8 The Subscription Economy

Access beats ownership. Subscriptions turn brand engagement into an ongoing, profitable relationship.



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