Positioning Trends Report 2026

The Averaging_

Seven forces pulling every brand towards the middle of its category. And the one move that gets you out.

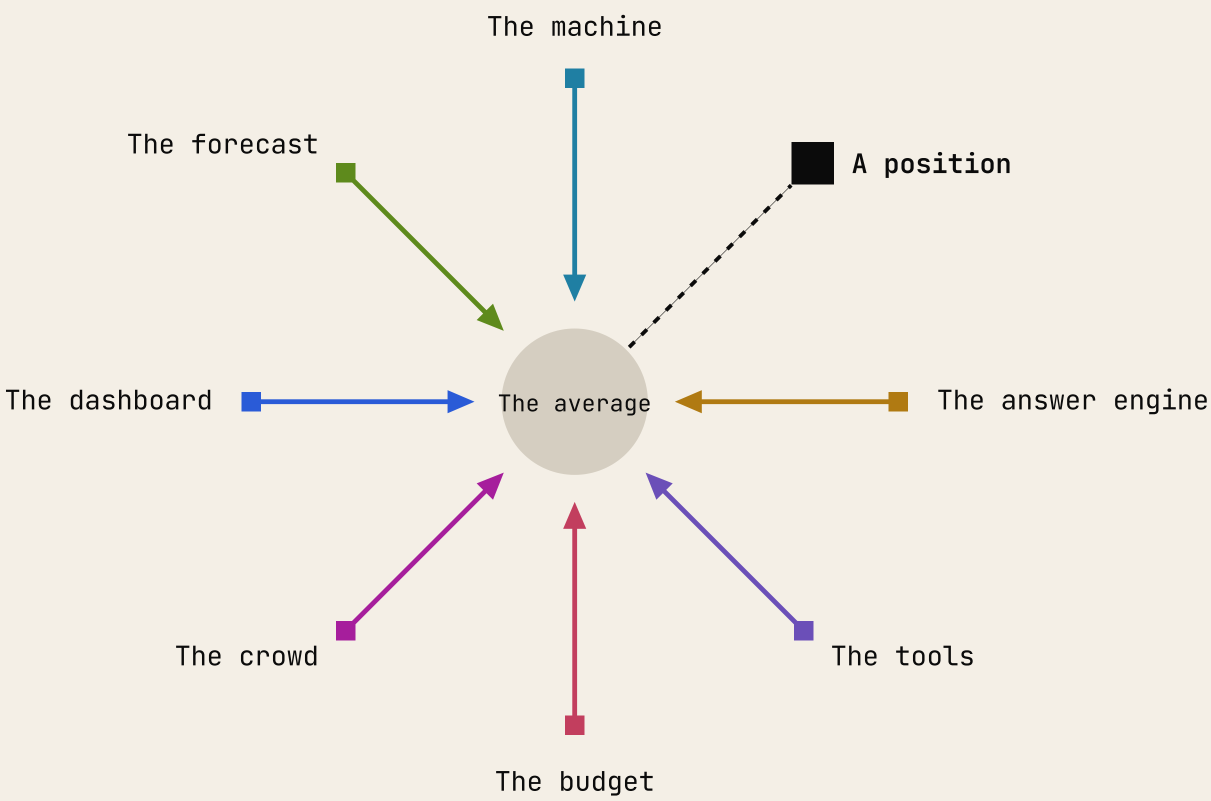
The argument

Every trend this year points the same way.

Read enough 2026 forecasts and they blur into one: authenticity, purpose, personalisation, AI. That is not a coincidence. It is the trend.

Look closely at the biggest shifts in how brands get found, judged and chosen, and they share a direction. The machines that now recommend brands summarise towards the typical. The tools that produce brand work generate the probable. Budgets drift to what can be measured. The web votes on who you are. Even the forecasts converge.

We call it The Averaging: seven forces, each pulling brands towards the middle of their category, where everyone sounds the same and buyers choose on price. Positioning is the only force that pulls the other way.

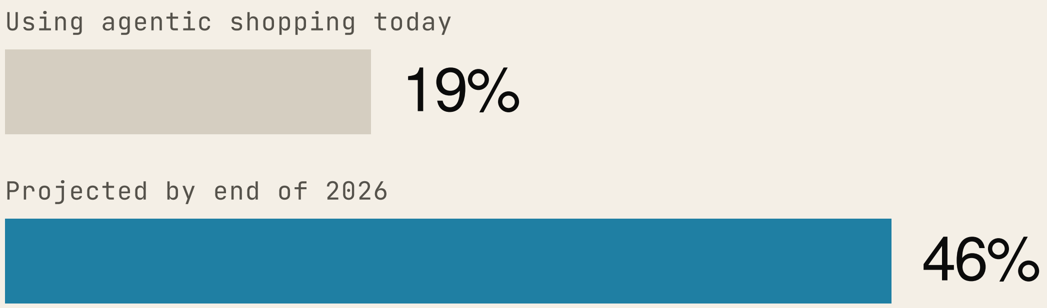


The Averaging. Seven forces pull towards the category average. A position is the one move that points out.

The first reader is no longer human.

The pull: a machine summarises your category, and summaries default to the typical.

For most of the history of brand, positioning was written for a person in a hurry. It now also has to be legible to a machine that has read everything. AI agents increasingly recommend, filter and choose on people's behalf, and NIQ finds AI now shapes how shoppers compare and narrow their options. The machines read differently too: early research shows shopping agents discount anything labelled sponsored and respond more to structured, authoritative signals than to emotional ones.



Consumer adoption of agentic shopping. Source: Braze (projection) [1]

Example / ChatGPT becomes a till

In September 2025 OpenAI launched Instant Checkout, letting US users buy from Etsy sellers inside ChatGPT, with Shopify merchants including Glossier, SKIMS and Spanx to follow. Etsy's shares rose 16% on the news [2]. OpenAI said products are ranked on relevance to the user's query and context [3].

Relevance to a question is a positioning problem. A brand that stands for one clear thing matches more specific questions than a brand that stands for everything reasonably well.

If your position can't survive being summarised, the summary becomes the category average.

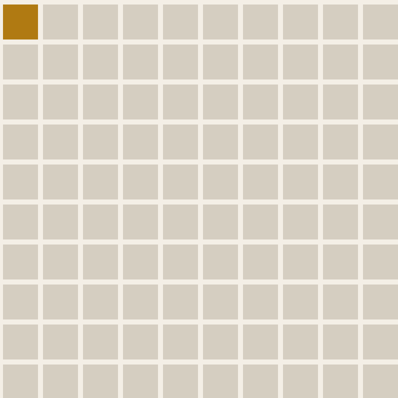
Do this on Monday

Ask three AI assistants who is best for your category and your customer. Screenshot the answers. That is your real positioning today.

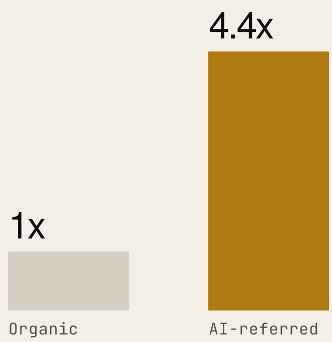
Traffic is falling. Intent is rising.

The pull: anything generic gets answered for free, before anyone reaches you.

Across 13,770 domains, AI referrals average around 1% of sessions [4]. But those visitors convert at roughly four times the rate of organic search, because the machine has already done their research [4]. Much of the influence never registers as a click: AI recommendations make people 2.5 times more likely to arrive later through branded search [5].



About 1 in 100 sessions comes from an AI referral [4]



Relative conversion rate. Source: Semrush via Omnibound [4]

Example / Chegg

Chegg built a business on being the answer to a student's homework question. Then the answer started appearing on the search page. In February 2025 it sued Google, saying non-subscriber traffic had fallen 49% in January alone. Fourth-quarter revenue was down 24% and it began exploring a sale [6].

If your position is "we have the answer", a machine that gives the answer away takes your position with it.

The buyer now arrives decided. The only question is whether you were named.

Do this on Monday

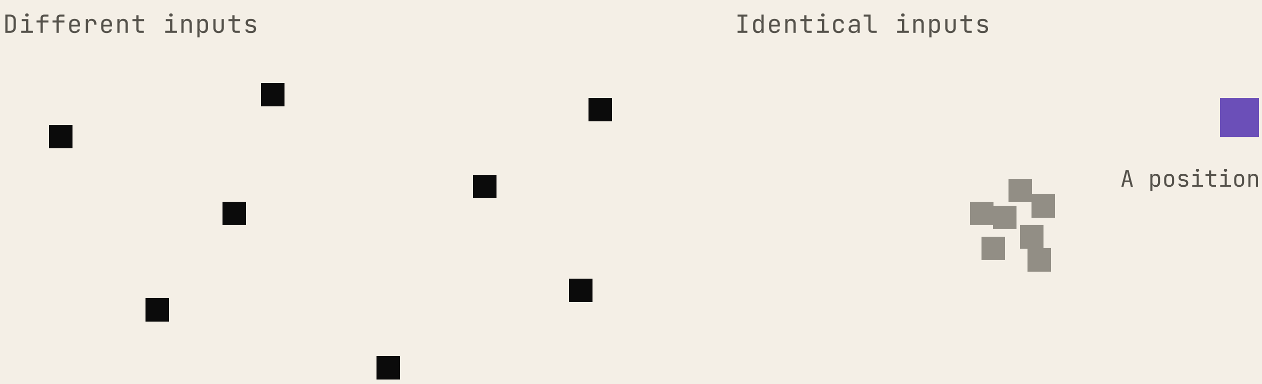
List everything you sell that a machine could give away. Then move your position to what's left.

Force 3 of 7 / The tools

Sameness is now free.

The pull: the same tools, fed the same briefs, produce the same work.

Generative tools have made competent output almost costless, and the side effect is convergence. In controlled studies, co-writing with an instruction-tuned model made different authors' work measurably more alike [7]. The telling finding is about cause: a 2026 experiment showed deliberately different inputs preserved much of the diversity of human-only work [8]. The sameness comes from identical inputs, not from the tool.



Illustrative. The position is the one input competitors can't share.

Example / Coca-Cola's Christmas

"Holidays Are Coming" is one of the most distinctive assets in advertising. In 2024 Coca-Cola remade it with generative AI and was widely mocked. In 2025 it doubled down with a new AI version, and the response was again overwhelmingly negative [9].

The tool didn't fail. The brand fed its most distinctive asset into a machine built to produce the average, and got the average back.

Distinctiveness used to be bought in execution. Now it is only available upstream.

Do this on Monday

Read the brief your team gives its AI tools. If a competitor could paste it unchanged, rewrite it until they couldn't.

Brand is the stated priority. Budgets say otherwise.

The pull: money drifts to what can be measured this quarter.

Surveyed across five European markets, senior marketers ranked branding their number-one priority for 2026, with generative and agentic AI 17th of 20 [10]. The money tells a different story. Fewer CMOs say their CEO and CFO believe in long-term brand building than a year ago [11], and in B2B the gap between what teams do and what they think is right is twenty points wide [12].

80→69

Per cent of CMOs who say their CEO and CFO believe in long-term brand building, last year to this [11]

Median B2B budget split, per cent [12]

Example / Airbnb, 2020 to 2021

During the pandemic Airbnb cut marketing from $1.14bn to $482m, most of it performance, and kept 95% of its traffic. Brian Chesky said it would never return to 2019 levels of spend as a share of revenue [13], and reframed marketing's job as education rather than buying customers [14].

The position was doing the work that paid media had been getting the credit for. Most businesses never find out, because they never switch the spend off.

Positioning survives a finance review because it asks for no new money. It changes the yield on money already spent.

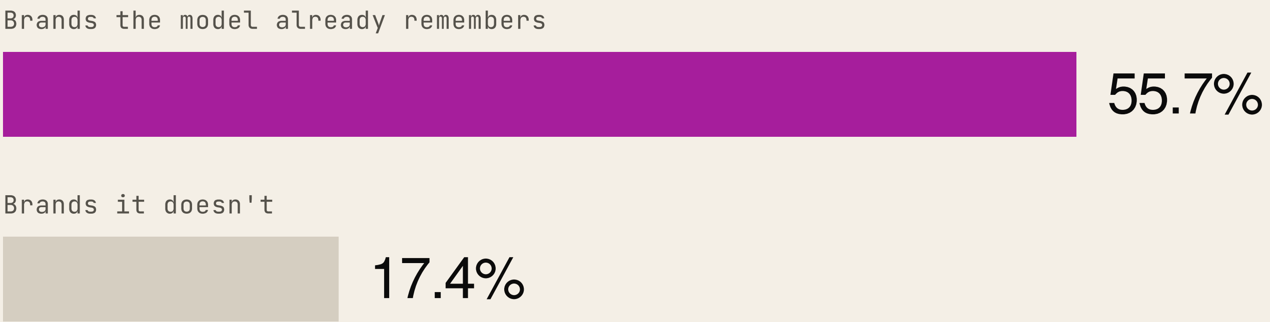
Do this on Monday

Pick one paid channel in one market and hold it back for a quarter. Watch what happens to branded demand. That is what your position is worth.

The proof has moved off your website.

The pull: you are what the web says about you, averaged.

Machines corroborate. They look for what others say about you. Across roughly 75,000 brands, YouTube mentions correlated most strongly with AI visibility [15]. Community platforms carry a large share of what gets cited [16], and the platforms know it: Google reportedly pays Reddit around $60m a year for its data [17].



How often AI searched for a brand before answering, across nearly 4,000 responses [18]

Example / Remembered, not ranked

The same 2026 study found category authority, built through press, analyst mentions and partnerships, raises the odds a model searches for and recommends a brand [18]. Airbnb is the case in point: with nearly 90% of its traffic direct, Chesky credited more than half a million press articles in a single year [19].

A position has to exist in other people's words before a machine will repeat it.

Do this on Monday

Count the places your position appears in someone else's words. Press, reviews, forums, video. If it's fewer than ten, that's the work.

Almost nobody measures the thing that matters.

The pull: what gets reported gets managed, and most dashboards report the average.

The best available proxy for positioning strength is people looking for you by name. It is cheap to track, easy to explain to a board and almost universally ignored.

14%

of marketers track whether AI mentions them, though 43% call AI optimisation a core strategy [20]

11%

monitor branded search or share of voice, the signal that shows influence referral data can't see [20]

Example / The number Airbnb reported

Airbnb didn't treat direct traffic as a marketing metric. Chesky reported to investors, on an earnings call, that 90% of traffic was unpaid or direct [21]. That is what making branded demand a board number looks like.

If you change one metric this year, make it branded search, and put it in front of the board.

Do this on Monday

Add branded search volume to next month's leadership pack, with the last twelve months beside it.

The forecasts agree with each other.

The pull: when everyone follows the same advice, the advice becomes the convention.

None of this year's consensus advice is wrong. All of it is available to everyone. When a category reads the same forecast and acts on it, following it becomes a way of disappearing.

MAISON	MAISON	MAISON
MAISON	MAISON	Maison

Illustrative

Example / Burberry's round trip, 2018 to 2023

In 2018 Burberry dropped its 1901 Equestrian Knight and serif wordmark for a clean sans-serif. Much of luxury did the same, and the result was a sea of barely distinguishable wordmarks [22]. In 2023, under Daniel Lee, the knight came back [23].

Following the convention made a 160-year-old brand look like everyone else. Leaving it made the news.

Positioning lives in the gap between what everyone is told to do and what only you can do.

Do this on Monday

Write down the five things every competitor says. Then strike them from your own website.

How averaged are you?

Seven questions, one for each force. Answer honestly. Nobody sees your score but you.

One question is weighted, and it can take points away. Discounting often costs you four; rarely discounting earns four. Price is what buyers fall back on when they can't tell you apart.

1 **Ask an AI assistant who is best for your category and your kind of customer. Are you named?**

Not named	0	One of several	1	First, with a reason	2

2 **Put your nearest rival's name on your positioning line. Does it still hold?**

Still true	0	Partly	1	It becomes false	2

3 **Where does your position appear in other people's words: press, reviews, forums, video?**

Nowhere I know of	0	A few places	1	Consistently	2

4 **Over the last twelve months, your branded search volume is:**

Falling, or I don't know	0	Flat	1	Growing	2

5 **How much of what you sell could a machine give away for free?**

Most of it	0	Some of it	1	Very little	2

6 **How often do you discount to win?** Weighted

Often	-4	Sometimes	-2	Rarely	4

7 **In the last year, what have you stopped doing, selling or saying because of your position?**

Nothing	0	One thing	1	Several things	2

6 or below: Averaged. The forces have you. Every one of them is reversible, starting with a decision.

7 to 11: Drifting. You have a position, but it isn't doing enough work yet. Start where you scored zero.

12 to 16: Imposed. You're holding ground others can't take. Keep paying what it costs.

Seven forces pull to the middle. One pulls out.

Narrow, specific, corroborated positions get carried by machines, remembered by buyers and funded by finance. Broad ones get averaged, forgotten and cut.

The Averaging isn't a threat that arrives one day. It's a current, running all the time, in every category. Standing still in it means drifting. The only way to hold ground is to take a position that costs something to hold, and hold it long enough for the market to notice.

The cost of vagueness rose this year. It will rise again next year.

Imposition_

If your score was uncomfortable, that is the work we do.

We do positioning that shows up in your numbers. Nothing else.

work@imposition.studio
imposition.studio

`Impose meaning. Not message.`

Sources

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