



CULTURAL VELOCITY

New Rules of Cultural Brand Building

OVERVIEW

HOW DO WE CONNECT WITH CONSUMERS IN 2026?

FOR THE PAST DECADES, AGENCIES AND BRANDS HAVE PLACED CULTURAL RELEVANCE AT THE HEART OF BRAND AND COMMS PLANNING.

AND IT WORKED!

Aligning with culture brought brands into a shared set of values and ideals that consumers believed in, driving commercial success.

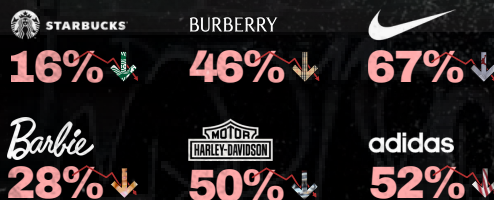
However, in 2026, instant access and algorithms have eroded culture as we know it & the brands at the centre of cultures are no longer connecting.

Now, the brands that are winning are using a different playbook.

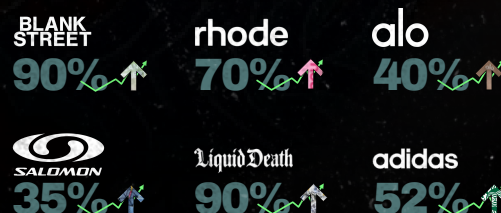
It's a cultural crisis, a changing of the guard & if you're still using the old playbook, it's essential you change now!

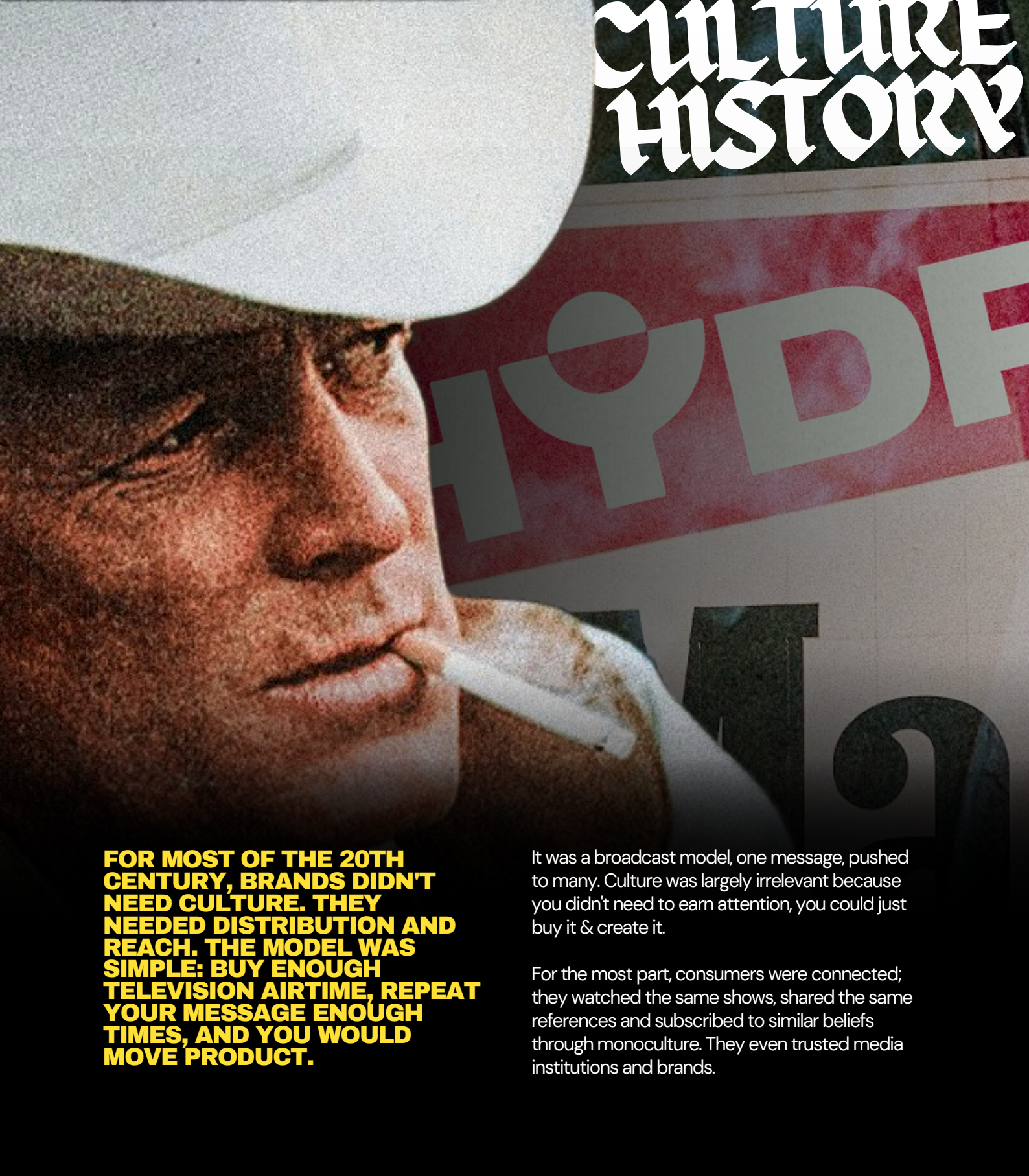
CONSUMERS HAVE SPOKEN, THE PLAYBOOK HAS SHIFTED & IT'S HAVING REAL-WORLD IMPACT

In 2018, Nike's Colin Kaepernick ad drove a 31% sales surge and hit an all-time stock high proof that standing for something commercially worked. By 2025, Nike's brand value had fallen 26% to \$33.7bn, dropping from 9th to 23rd in Interbrand's global rankings. Starbucks, Harley-Davidson, Burberry, Adidas, all built on cultural positioning that once drove preference. All declining in categories where competitors are growing. In 2026, no one is burning Alo Yoga or Salomon because of what they stand for.



These high-growth brands are not aligned to culture they're aligned to aesthetics. Alo Yoga has grown 276% since 2021, surpassing \$1bn in revenue, while Rhode hit \$100m+ within two years of launch. Liquid Death reached a \$1.4bn valuation selling water. Blank Street didn't replace Starbucks by standing for something it replaced it by looking better. Salomon didn't challenge Nike's values it made them irrelevant. These brands aren't selling identity. They're selling taste





CULTURE HISTORY

FOR MOST OF THE 20TH CENTURY, BRANDS DIDN'T NEED CULTURE. THEY NEEDED DISTRIBUTION AND REACH. THE MODEL WAS SIMPLE: BUY ENOUGH TELEVISION AIRTIME, REPEAT YOUR MESSAGE ENOUGH TIMES, AND YOU WOULD MOVE PRODUCT.

It was a broadcast model, one message, pushed to many. Culture was largely irrelevant because you didn't need to earn attention, you could just buy it & create it.

For the most part, consumers were connected; they watched the same shows, shared the same references and subscribed to similar beliefs through monoculture. They even trusted media institutions and brands.

TOWARDS THE END OF THE 20TH CENTURY CULTURE BECAME STRATEGICALLY IMPORTANT AS SOCIETIAL NORMS SHIFTED

- **Media fragmented**, attention became scarce and had to be earned.
- **Monoculture broke down**, and mass messaging stopped resonating.
- **Institutional trust eroded**, consumers stopped believing what brands said about themselves and began believing only what the culture said about them.

So brands didn't choose to care about culture. They were forced to, because culture became one of the only remaining mechanisms through which trust and meaning could be authentically transferred to a brand.

The brands that understood this earliest, Nike, Supreme, and Red Bull, built enormous equity.

The ones that didn't kept buying airtime and wondered why it stopped working.



THE BROADCAST ERA

1950+



In the broadcast era, television scales and mass advertising were born. Brands buy reach. Culture is largely irrelevant to marketing strategy.

CULTURAL REVOLUTION

1980+

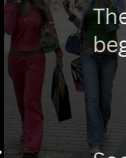


Cable TV fragments audiences. Subcultures emerge with genuine distinctiveness. A handful of brands begin to realise that embedding in culture creates something advertising can't buy.



INTERNET ERA

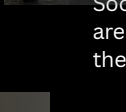
2000+



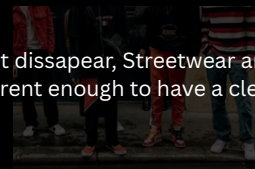
The internet begins dissolving geography & fragmenting media. More and more brands begin to embed in culture and finding a cultural niche becomes central to brand strategy.

SOCIAL FRAGMENT

2012+



Social media emerges and monocultures all but disappear. Streetwear and hipster culture are large enough to matter commercially, coherent enough to have a clear identity, and the last of an era.



SOCIAL FRAGMENT

2025+



Social media matures, monoculture & sub-cultures fade. There is no single culture left large enough to carry a brand to mass relevance on its own. Creators replace culture as the conduit.

WHAT KILLED

SUBCULTURE?

01

INSTANT ACCESS DESTROYED THE INITIATION PROCESS

Being a goth or punk required effort, travelling to specific shops, and dedicating time to assembling the look.

Now, you can buy a complete "punk" or "goth" wardrobe from Shein in minutes without engaging with the music, ideology, or community.

03

ALGORITHMS REPLACED GATEKEEPERS

TikTok's algorithm doesn't serve you content from your scene; it serves you content optimised for engagement.

The power to decide what's "good" moved from trusted curators to recommendation engines. This democratized access but destroyed the curation that gave subcultures coherence.

02

CO-OPTATION ACCELERATED TO NEAR-INSTANT

In the old model, subcultures had years to develop before the mainstream noticed.

Now, algorithms surface emerging aesthetics within days, and fast fashion can produce knockoffs within weeks. As one researcher described: "The aesthetic gets packaged and sold before any culture fully forms."

04

THE TREND CYCLE COLLAPSED

Traditional trend cycles lasted 5–10 years, sometimes 20.

Microtrends now last weeks. And major trends come and go in just a few months, creating a constant churn of disposable cultural moments, none deep enough to constitute a real subculture.





SUB CULTURES

Subcultures were “spaces of resistance where marginalised groups create alternative meaning systems through style, language, and spatial practice”

THE MEANING OF STYLE (1979)

DICK HEBDIGE



A NEW ERA OF PLANNING

Culture as we once knew it is dead; consumers are no longer sharing meaning, values, and identity as large collective groups with commercial value.

Consumers are unrestricted in developing their own eclectic mix of values, interests and identity unique to them

While trends, yes, are synonymous with large groups, they lack deeper meaning and are often confused with culture.

These trends are aesthetic visual identities stripped of their underlying belief systems, communities and staying power.

Cottagecore, dark academia, clean girl, coquette, grandadcore, coastal grandma, these are shopping categories and tiktok hashtags, not subcultures.

There is no "cottagecore music." There is no "clean girl ideology."

You can't answer "what does the balletcore subculture believe in?"

As one writer put it, subcultures used to follow a formula of music + style + belief system. Today's "cores" are just a style.

What replaces them is what we call **Cultural Velocity** the compounding effect of brand presence built through creator infrastructure, not campaign moments.

Culture used to be something you embedded in. Now it's something you build, continuously, through the people your consumers already trust

This fundamentally changes the way we plan.

ALGORITHMS REPLACED CULTURE

For most of human history, the forces that shaped a person's values and interests were slow, local, and deeply human. Family-transmitted beliefs across generations. Communities defined what was aspirational. Friends shaped taste.

These were not passive influences; they required physical proximity, shared experience, and time. That friction created conviction. You didn't pick up a new set of values overnight because you couldn't. The culture around you moved slowly, and so did you.

93% of consumers trusted friends and family above all other sources, and participation in any culture required real effort: travelling to the right places, finding the right people, learning the codes over time. That friction was a feature, not a bug. It created commitment.

**CULTURE HAS BEEN ATOMISED,
BROKEN DOWN FROM
SOMETHING SHARED AND
COLLECTIVE INTO SOMETHING
PERSONAL AND CONTINUOUSLY
ASSEMBLED.**

Then three things happened simultaneously.

Algorithms dissolved the friction of discovery. Fast fashion and instant access dissolved the friction of participation. And social media dissolved the friction of identity, making it possible to adopt and discard a new version of yourself in days rather than years.

The result is not just that trend cycles collapsed, though they did, from decades to weeks. It is that the entire set of conditions required for culture to form has been removed. Culture needs time to develop shared meaning. It needs friction to create commitment. It needs a community to hold it together.

Algorithms systematically eliminated all three.

47 SECS

AVERAGE HUMAN ATTENTION SPAN TODAY DOWN FROM OVER 2 MINUTES IN 2004

100K

PEOPLE STUDIED IN A META-ANALYSIS LINKING SHORT-FORM VIDEO TO MEASURABLY REDUCED ATTENTION AND INHIBITORY CONTROL

**THESE SYSTEMS HAVE
BEEN REPLACED, NOT BY
ANOTHER CULTURE BUT
BY AN ALGORITHM, AND
BY THE CREATORS WHO
FEED IT.**

**CREATORS NOW HAVE MORE
DAILY CONTACT WITH YOUNG
CONSUMERS THAN FAMILY AND
FRIENDS DO.**

Almost 9 in 10 Gen Z adults follow at least one creator on social media, and those creators now get more daily facetime with young people than any other media source, likely more than Gen Z's own family and friends. Nearly two-thirds of Gen Z have had multiple real-life conversations in the past month based on something a creator discussed online.

Creators are not merely reflecting interests. They are creating them. A single 60-second video can introduce a consumer to a new aesthetic, a new belief, a new product category, and a new version of themselves. There is no slow initiation, no community to earn membership in, no friction to create commitment. Interest is adopted instantly and abandoned just as fast, because there is nothing structural holding it in place.

THE PROBLEM FOR BRANDS

THE OLD PLAYBOOK IS BROKEN

Brands can no longer:

- Identify a stable subculture to embed in (they don't exist in the old sense)
- Build slowly over the years (the trend cycle moves in weeks)
- Rely on scarcity and gatekeepers for credibility (everything is instantly accessible)
- Align with a fixed set of values associated with a scene (values are fluid, personal, creator-defined)
- Use traditional celebrity endorsements (only 11% of consumers prefer celebrity influencers)

THE NEW PLAYBOOK IS UNCLEAR

Most brands are responding by:

- Chasing microtrends (which die before campaigns can launch)
- Throwing money at influencer posts (transactional, no cultural depth)
- Trying to "be on TikTok" without understanding creator-native culture
- Using EMV and vanity metrics to justify spend, they can't connect to business outcomes



THE BIG MISTAKE

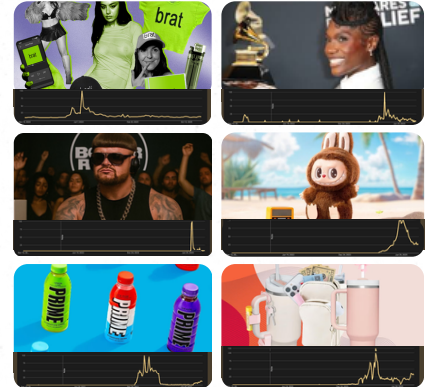
"MICROTRENDS", CULTURE WITHOUT PURPOSE

It's easy for brands to confuse micro-trends with culture.

Our long-standing views of what culture is have been fundamentally challenged.

For brands, the temptation to continuously jump on micro-trends is attractive; however, for most, it's a strategic approach that, in the long term, is detrimental.

Views and attention are fleeting in this algorithmic world, and micro-trends are the cheapest form of attention. Sure, for budget brands whose sales are price-driven, constant cheap attention is valuable. However, for the rest it's a short-term win and a long-term loss.



**THE BRANDS
WINNING AREN'T
CHASING
CULTURAL
MOMENTS.
THEY'RE BUILDING
CULTURAL
VELOCITY**



**CONSUMERS
NOW CURATE
THEIR OWN
INDIVIDUAL
CULTURE**

CULTURE IS NO LONGER SET BY MOVEMENTS, SCENES, OR SUBCULTURES. INDIVIDUALS ARE FREE TO PICK UP AND DROP VALUES & INTERESTS QUICKLY. THEY ARE CONTINUOUSLY CURATING THEIR OWN INDIVIDUALISTIC CULTURAL LANDSCAPE

HOW TO LOSE THE GAME WIN CULTURAL VELOCITY

WE KNOW THAT MONO & SUBCULTURE DECLINE HAS LED CONSUMERS TO CURATE THEIR OWN INDIVIDUALISTIC CULTURAL LANDSCAPE, WHILE WE ALSO KNOW THAT THE ONLY MONO-CULTURAL ASPECTS OF SOCIETY ARE KEY MOMENTS, FROM CHRISTMAS TO GLOBAL SPORTING EVENTS.

TO WIN WE HAVE A NEW PLAYBOOK, WE CALL IT CULTURAL VELOCITY

Firstly

To win, we need to target the sources of information & inspiration that consumers use to curate their cultural viewpoints.



We need

An always-on framework that delivers cultural velocity.

Secondly

We must identify mono-cultural moments where our brand can show up, be present, and become ubiquitous with that moment.



We need

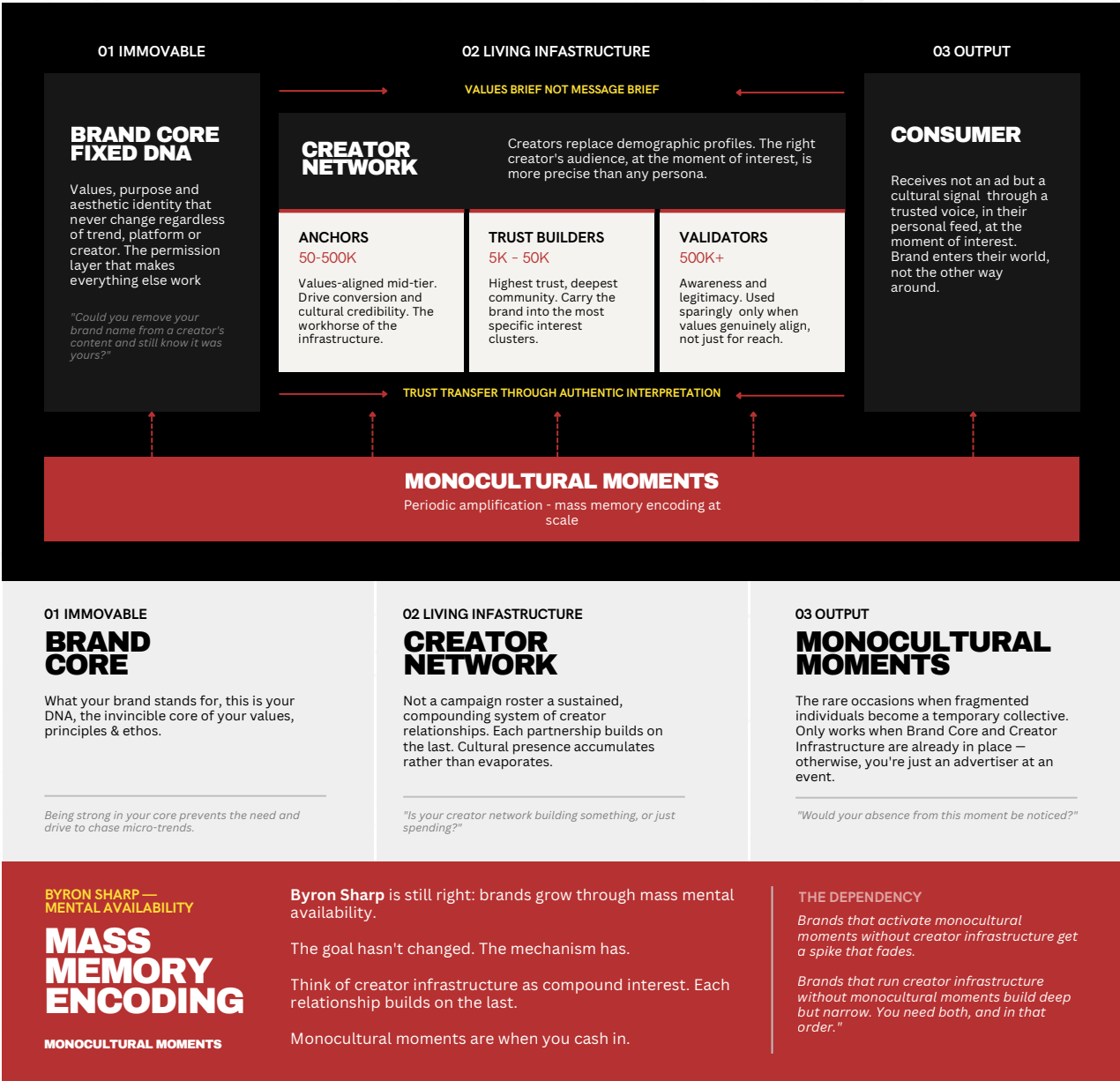
The ability to deeply connect & associate the brand to these moments.

CULTURAL VELOCITY FRAMEWORK

The old playbook asked brands to find a culture and embed in it.

The new one demands something harder: building a system that compounds over time, reaches individuals through the creators they trust, and shows up at the rare moments when society still watches together.

This framework has three components. None of them works in isolation. Together, they form a flywheel where cultural presence accumulates rather than evaporates.



THE NEW PLANNING MODEL

The planning calendar this demands looks fundamentally different from a traditional media plan.

Instead of campaign flights, you have a continuous creator programme punctuated by deliberate monocultural moment activations, each chosen for cultural fit with the Brand Core, not audience size alone.

OLD PLANNING ASSUMPTION	NEW PLANNING REALITY
Consumers belong to stable, identifiable demographic groups	Creators are the segmentation tool. Their audience, at the moment of interest, is more precise than any demographic profile.
Brand writes the message, creator delivers it	Brand defines the space. Creator interprets it. If you need 40 pages to explain your brand, the core isn't strong enough.
Campaign flights — big moments, then silence	Always-on infrastructure punctuated by monocultural moment activations that amplify what already exists.
Reach and impressions as primary KPIs	Cultural presence that compounds. Each creator relationship builds on the last. Measured in trust depth, not volume.
Monocultural moments as standalone campaigns	Moments amplify the infrastructure. They encode at scale only when the brand already lives in consumers' daily cultural feed.

THE THREE BRAND READINESS TESTS

01 DO YOUR CREATORS BELIEVE IN YOUR BRAND WITHOUT BEING PAID TO? If the only reason creators talk about your brand is the fee, the trust transfer never happens. The audience knows and disengages.	02 WOULD YOUR ABSENCE FROM A MONOCULTURAL MOMENT BE NOTICED? If your brand disappeared from a key cultural moment and nobody noticed, the Brand Core and creator infrastructure haven't done their work yet.	03 CAN A CONSUMER DESCRIBE WHAT YOU STAND FOR WITHOUT NAMING A PRODUCT? If consumers can only identify you by product category, not values, you have distribution — not culture. The old playbook, still running.
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RECAP

