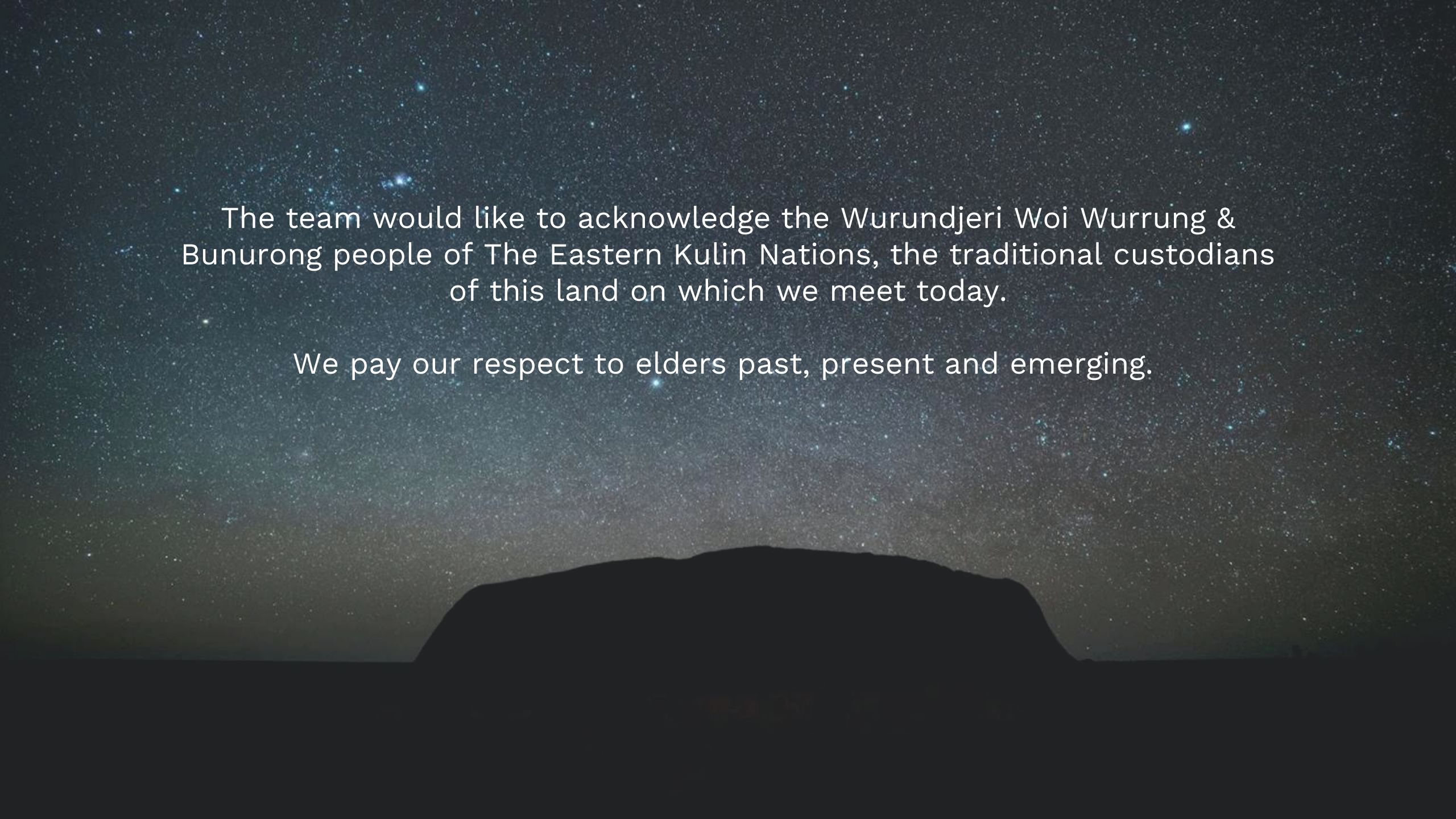


CULTURECAST



The team would like to acknowledge the Wurundjeri Woi Wurrung & Bunurong people of The Eastern Kulin Nations, the traditional custodians of this land on which we meet today.

We pay our respect to elders past, present and emerging.

CULTURECAST

Tgarage × **OF A FEATHER**

The Australian psyche revealed strategies for
shifting consumption patterns and media engagement

OUR APPROACH TO CULTURAL CHANGE

Demographic
Age, Immigration

Economic
COL, employment

Political
Freedom of speech

Ecological
Climate change

Sociological
Gender, equality

Technological
AI, Smart Tech

**MACRO
FORCES**

(DEPEST MODEL)

Institutional Structures
Government, Health,
Education, Business
adaptation

Behaviour,
values & beliefs

Social &
cultural Norms

Digital Conversations
& Social Norming

**SHOWING
UP**

(Anothony Giddens
Structuration Theory)

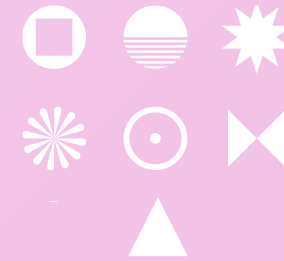
Tapping into human
needs and motivations

SDT

Autonomy
Competence
Relatedness

**HUMAN
NEEDS**

(Deci & Ryan Self
Determination theory)



**DRIVING
CHANGE**

**UNLOCKING
OPPORTUNITIES**



OUR APPROACH

01



GLOBAL TREND ANALYSIS

Analyse global trends and business developments.

02



SAYSO INSIGHTS

30,000 Strong Say So community always on Meta Trends.

03



CONSUMER SENTIMENT

Consumer sentiment tracking 2x a year
Adhoc dip 4-6 times a year.

04



RESEARCH STUDIES

Collective learning from over 400 research studies.

05



QUALITATIVE INTERVIEWS

Conduct 100 qualitative interviews specifically for the project.

06



SOCIAL LISTENING

Monitor online conversations to reveal market trends.

THE COLLECTIVE ERA 1945 — 1970

Secure pathways
& strong communities

TRUST → HIGH



THE UNRAVELLING 2000 — 2015

Digital empowerment
alongside instability

TRUST → ERODING



Social stability under strain

RISE OF THE INDIVIDUAL 1970 — 2000

Freedom and affluence –
but only for some?

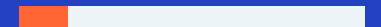
TRUST → DECLINING

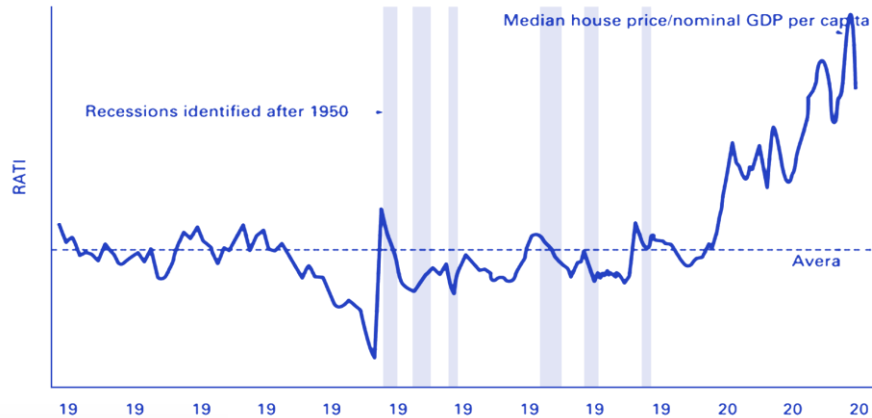


THE FRACTURING 2015 — NOW

Thwarted dreams,
promises broken

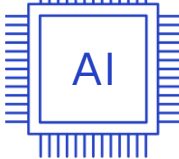
TRUST → CRITICAL





20% AUS TRUST GOVERNMENT
22% TRUST BRANDS
28% TRUST BANKS
15% TRUST MEDIA
18% TRUST AI*

SaySo (T2B) July, 26



House price / GDP per capita. Source: Minack Advisers.

Where are we today?

↑ 23%

INFLATION
2023-2026



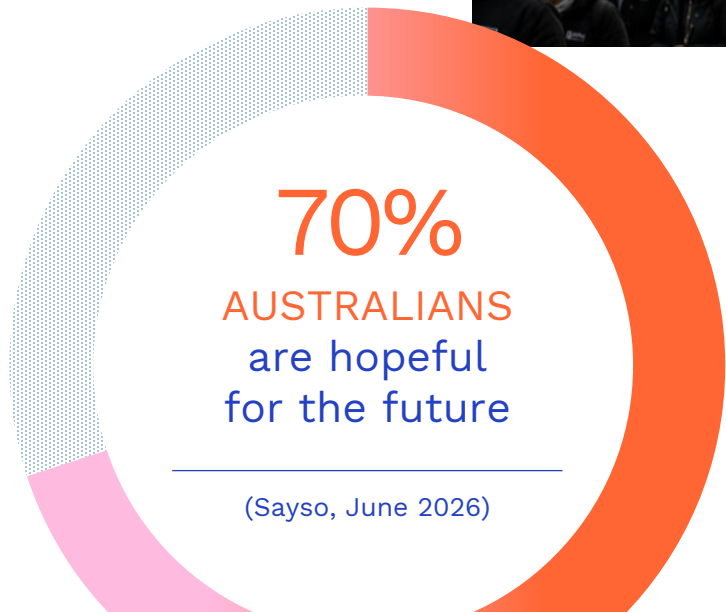
↑ 71%

HAVE A
TRUST GAP*



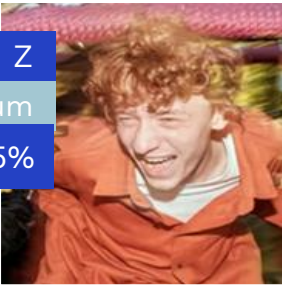


The recalibration has begun



Highest level of hope for the future since we left the COVID lockdowns

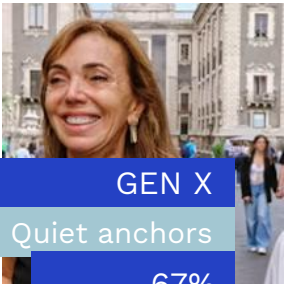
GEN Z
Intentional Equilibrium
75%



MILLENNIAL
Meaning makers
67%



GEN X
Quiet anchors
67%

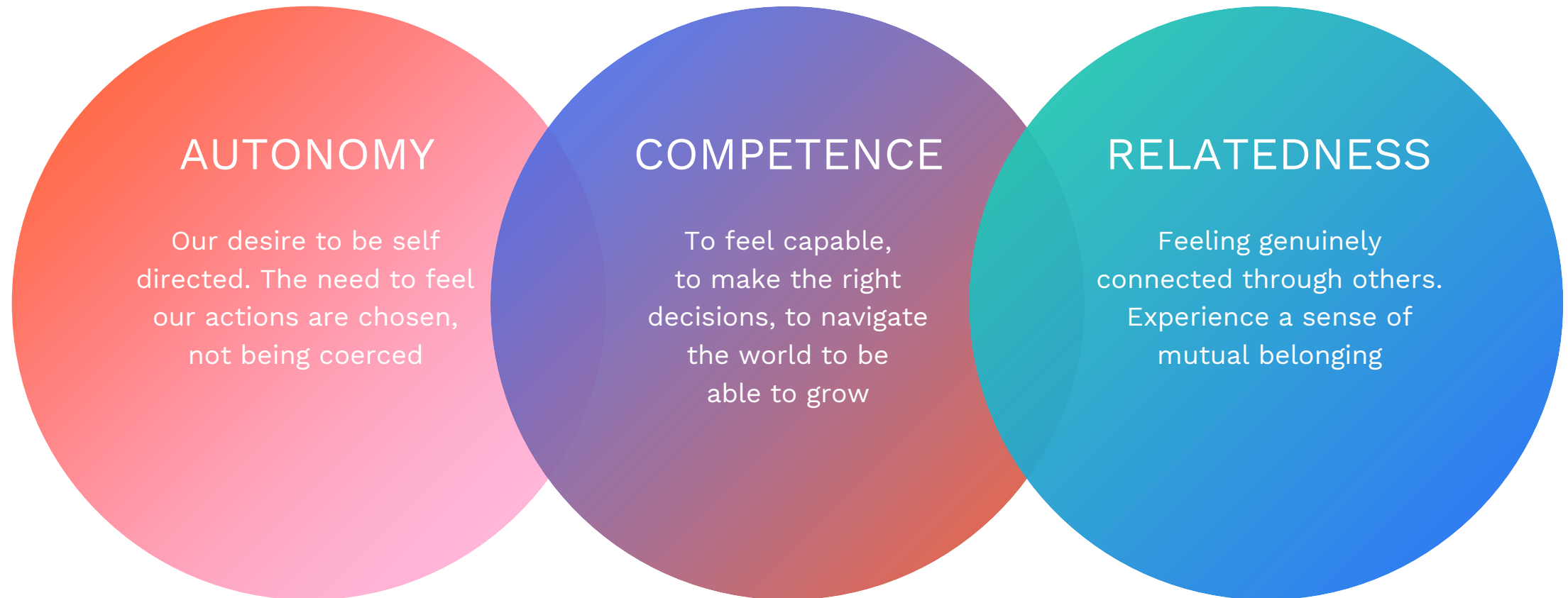


BOOMERS
Life maximisers
70%

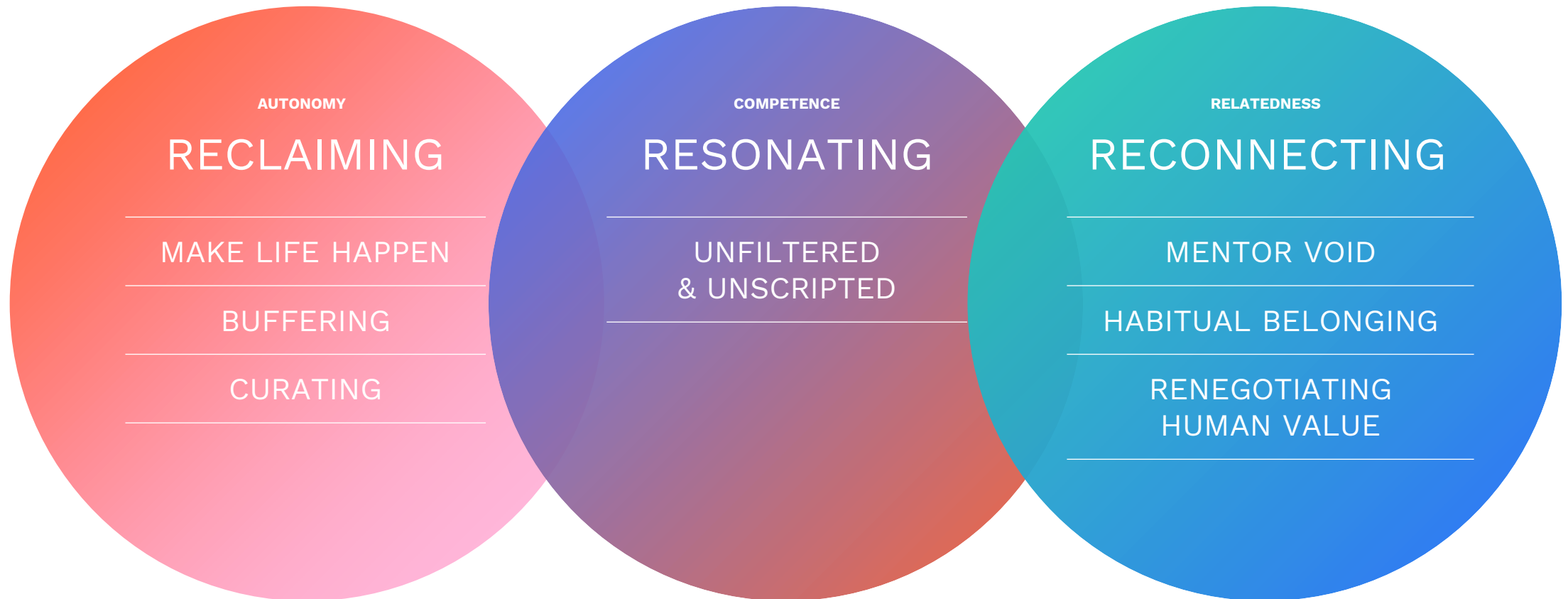


The brands that win, will restore what the world is taking.

SELF-DETERMINATION THEORY: CULTURAL RESPONSE MAP



SELF-DETERMINATION THEORY: CULTURAL RESPONSE MAP



AUTONOMY

RECLAIMING

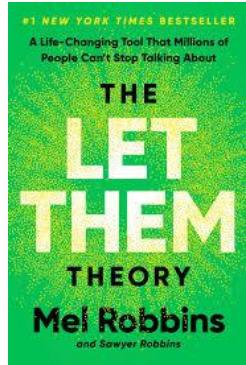
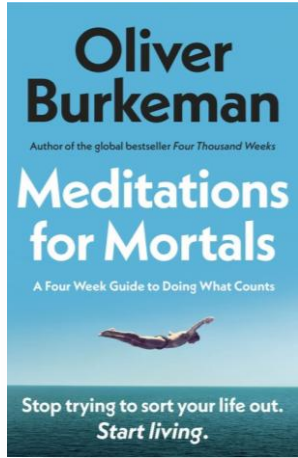
The world is getting larger and feeling more uncontrollable. Macro-forces are making it harder for us to make the big choices. So we are compensating by managing the small things. We are looking to the small acts, and reclaiming our autonomy one micro-decision at a time.

CURATING	1.3
BUFFERING	1.2
MAKE LIFE HAPPEN	1.1

MAKE LIFE HAPPEN

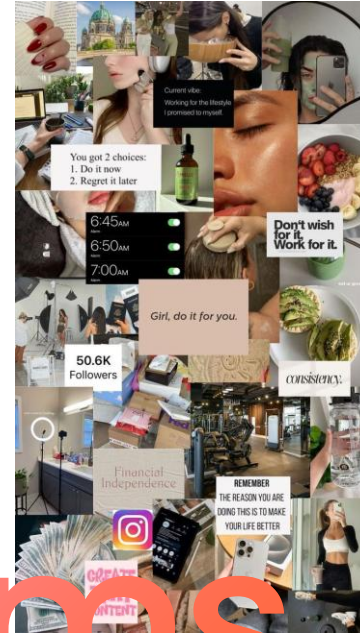
As the big levers of control are slipping further out of reach, we are compensating by managing the small things, the rituals, routines and spaces where we get the final say.





TAKING BACK
CONTROL

Vision boards
helping consumers
focus on what
they can control



I can't change
the economy,
politics or AI,
but I can **redesign**
my own life

44% of Australians are
prioritising activities to
help their personal growth,
with over 50% planning to
take up a new hobby
in the next year. (SaySo)

On my terms

DEATH OF HUSTLE CULTURE

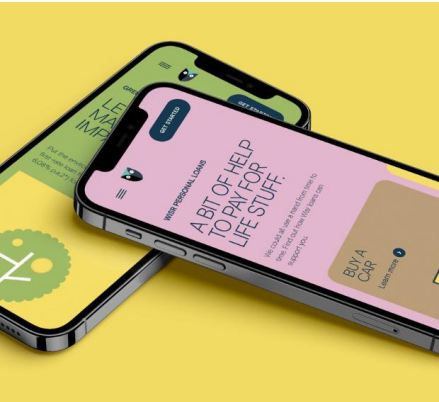
Small wins within reach replacing big aspirations,
with consumers seeking more control in the moments they can influence.

Hustle Culture is the belief that success requires commodifying our hobbies, taking no days off, and moving the goalpost on what it means to achieve success. As important as it is to achieve our goals, feeding into hustle culture can lead to exhaustion and burn out.



I like to think now, as an adult with my own money to spend, I am the most in control I ever have been. I have learned a lot over the years and I'm now able to make my own informed decisions and have full control over what I eat and when I eat.

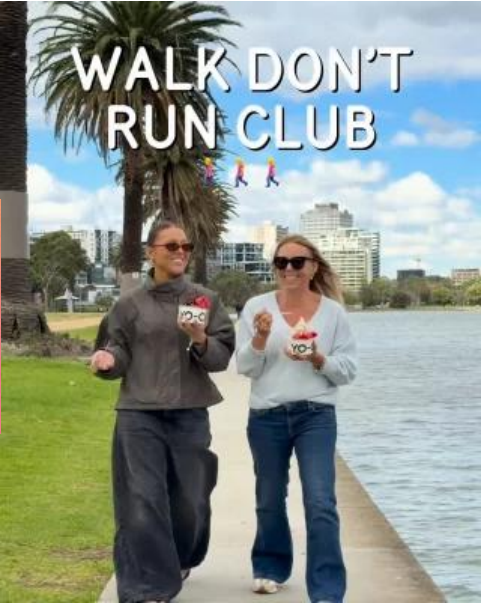
FEMALE, 21



BUILD YOUR OWN BEEF BURGER

Grass-fed, free-range beef patty. Build your beef burger by selecting your bun and adding fresh, natural ingredients.

ORDER NOW



Wins in reach
celebrating
incremental
progress.



ON MY TERMS What we're seeing

Choose an instant reward



Play the gameboard on
#RewardsWednesday



LITTLE TREAT CULTURE



Australian's #1 source of happiness is enjoying the simple pleasures of life (sayso)

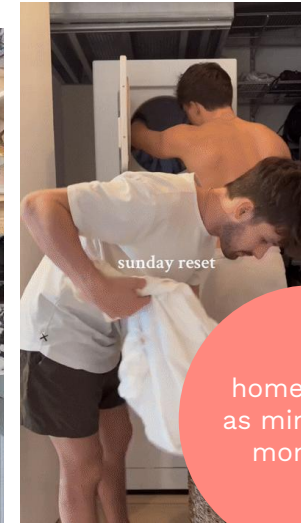
A premium chocolate brand positioned around small moments of indulgence rather than grand gifting occasions.



ROMANTISING THE EVERYDAY

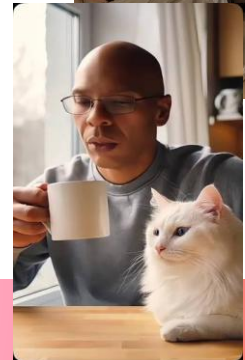


#SLOWSUNDAYS
620+ million views on tiktok



RITUALISATION

home rituals as mini luxury moments



I have recently discovered a couple of moments that bring joy - firstly, slow mornings, with my cat and coffee in hand. I really love an easy start to the day, it brings peace and calmness.

MALE, 40

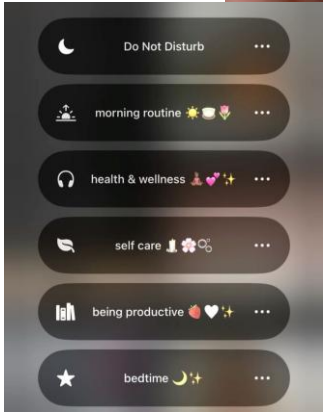
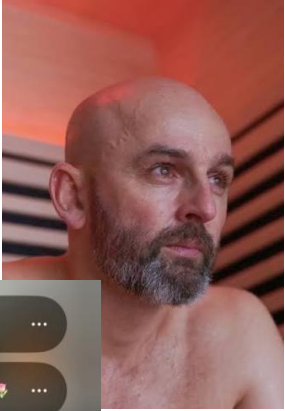
Moment Maxxing

Big milestones feel further away, so consumers are investing in making ordinary moments feel extraordinary.

BUFFERING

In a turbulent, noisy world, we are building small moments of calm. Spaces and rituals where we get to live life on our terms.





Comfort has shifted from emotional want to biological need

1 IN 3

Of Australian say seeing comfort is a top personal need right (SaySo)



sunday self care

- ☐ make yourself a nice breakfast 🍳
- ☐ change bed + clean room 🧹
- ☐ pilates/meditation (class) 🧘
- ☐ a warm bath + hair mask 🛁
- ☐ everything shower + blowout 💨
- ☐ extensive skincare routine (led light therapy, face mask, guasha) 💆
- ☐ write down goals for the coming week 📝
- ☐ bake something for the upcoming week 🍪
- ☐ have a little walk 🚶
- ☐ make comfort food for dinner 🍲
- ☐ watch fav comfort show (sex and the city, desperate housewives, gilmore girls) 💖
- ☐ pinterest + sleepy tea 🍵
- ☐ journal and off to sleep 😴

REGULATION IS THE NEW WELLNESS RITUAL

Elevated comfort

Rising anxiety and information overload are fuelling an anti-stimulation movement, with consumers intentionally designing comfort into everyday life.



In Jan 2020 97.8% of written content online was human generated (eWeek 2025)

52%

Mid 2025, about 52% is AI generation

I feel overwhelmed by how easy AI has merged into social media & sometimes struggle to differentiate what's real or not & that makes me hesitant to put much trust into anything I see.

MALE, 40





Products that support emotional wellbeing through the senses.



THE SENSORY ECONOMY IS BOOMING

Consumers are regulating their nervous systems as much as their emotions.

The world got loud, so 2026 is whispering.



ELEVATED COMFORT

What we're seeing



Turning digital boundaries into a physical habit



Help consumer reconnect with rituals and moments of calm



Toy story 5 blends nostalgia with tech-age themes



EMOTIONAL SAFETY



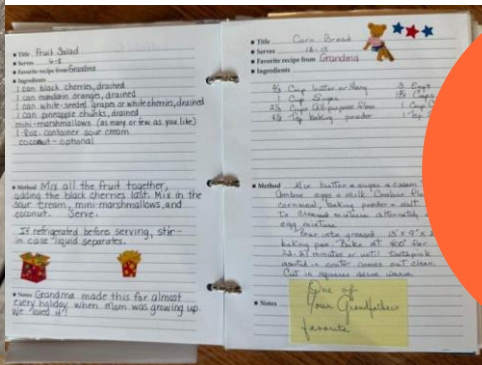
Torn between comfort in the past & frustration with the present.

IT'S NOT JUST RETRO, IT'S REASSURANCE



Familiarity + Originality

Consumers are craving the comfort of the familiar, but only when it's reimagined in ways that feel fresh and culturally relevant.



68%

68% want to feel safe / secure as their No. 1 need



71% of consumers appreciate products that evoke memories of the past. This trend isn't just about returning to roots but enhancing them for modern palates.

(Mintel Food Trend Report, 2025)



NOSTALGIC
COLLABS



Warheads Sour
Watermelon Storms

Adult happy meals
launched in Australia
with a nostalgic twist.



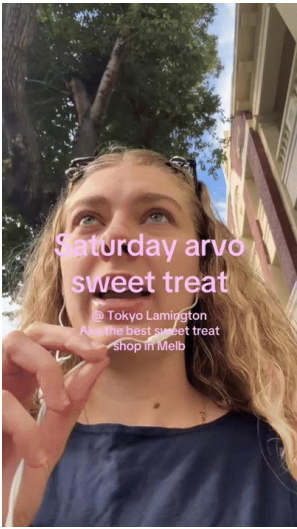
McDonald's Australia to drop meal based
around classic '90s sitcom - but it won't be
around for long



Blend familiarity
with originality -
reinterpreting the
past while
forging something
new.

FAMILIARITY + ORIGINALITY

What we're seeing



Saturday arvo
sweet treat

© Tokyo Lamington
Also the best sweet treat
shop in Meib



When Tamagotchi
gets an AI upgrade...

AI tamagotchi
style pet.



CURATING

We can't control the noise, so we control the gate.
It's not about having more, it's about what earns
a place past it, and what that choice says about us.



SOCIAL PROOF ECONOMY



"I don't want to buy a packet of chips today, to come back in 3 days and find out they are half price."

(Male, 62)

PROMOTION PARALYSIS



Decision Delirium

LOYALTY PROGRAM FATIGUE

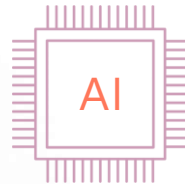


76%

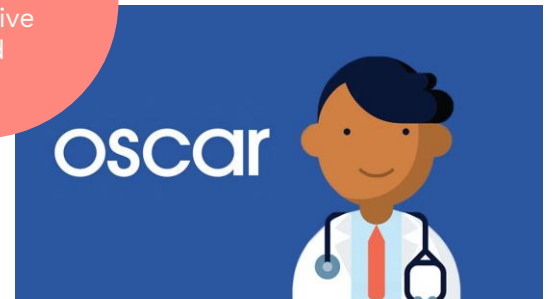
of consumers have low to medium satisfaction with comparison sites (SaySo)



Decision fatigue is driving demand for shortcuts, trusted recommendations and simplified experiences.



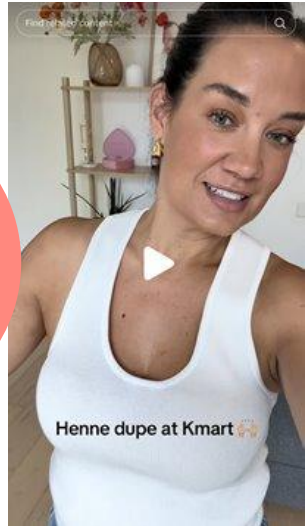
Reducing the cognitive load



JUSTIFIED SPENDING RULES



Flipping the script on cheap 39% purchase cheaper brands



Money-out-loud



Loud Budgeting (pt.2)

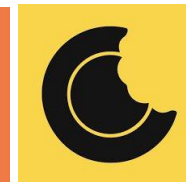
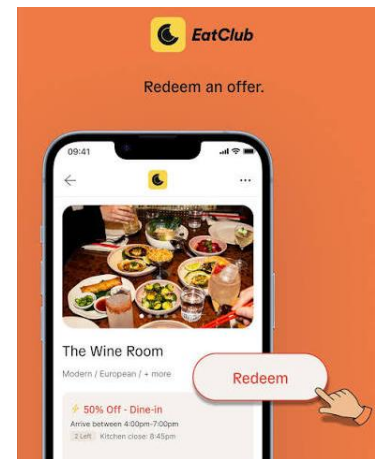
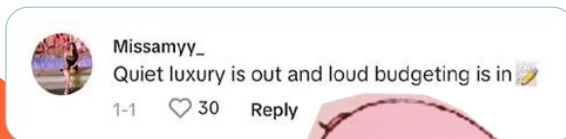
- ☐ Refills only
- ☐ Trip/ weekend plans/ special event does not mean new outfit!!!
- ☐ No new ser...
- ☐ ...n't in my ... with myself)
- ☐ ...
- ☐ Library ...
- ☐ ... hobbies



LOUD BUDGETING

76% buy sales items much as possible

As cost-of-living pressures persist, consumers are making spending decisions more consciously, openly discussing money and seeking greater confidence in every purchase.



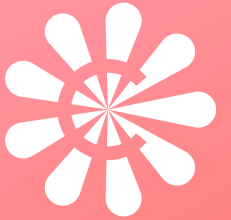
THE DUPE SPOT

Est.2021

Hand made in Melbourne



Opportunities



BRING LIFE WITHIN REACH

How can you create an environment or offerings, where life is achievable and you can provide access to small wins that can be celebrated.

REDUCE THE NOISE, OR INCREASE CALM

People are looking for more calm, and more moments of space, they are looking to reduce the adrenaline and anxiety.

HELP THEM CURATE THE WORLD

Are your offerings overwhelming, do that make the decision to say yes easy?

Are people proud to be loudly budgeting your products?

COMPETENCE

RESONATING

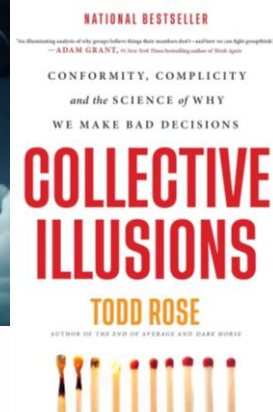
Competence is the need to feel effective and capable of good judgment, to navigate the world and produce outcomes.

This is the most underestimated need under pressure.

UNFILTERED & UNSCRIPTED

We're doubting our ability to know what is real. Polish has stopped signalling quality, and started signalling concealment. If something looks unscripted and raw, it's probably not hiding anything — and if it's not hiding anything, it might be true.





A social phenomenon where a majority of individuals in a group privately disagree with a norm or belief but outwardly support it, mistakenly believing that most others agree with it

WHAT WE VALUE

52%
Family & relationships

38% Peace of mind

34% Connection & belonging

24% Small, simple moments

WHAT WE THINK OTHERS VALUE

54%
Money & Financial success

46% Travel & experiences

38% Status & achievement

16% Health & wellbeing

SaySo, July 26

Subjective realities

In an era of competing narratives, consumers increasingly trust what they can see, experience and verify for themselves



CU Boulder study on difference on perceived positions between Democrats and Republicans (.75 on a 5 point reality vs 2 point perceived)

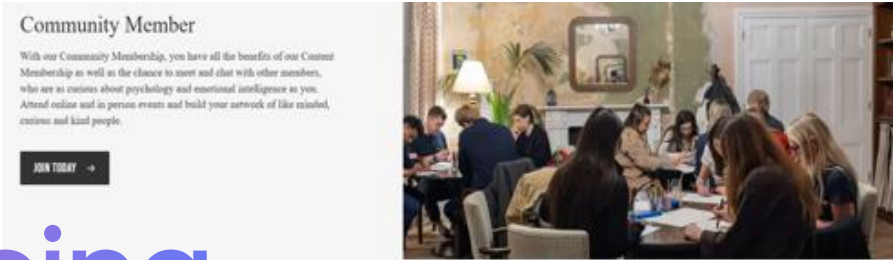
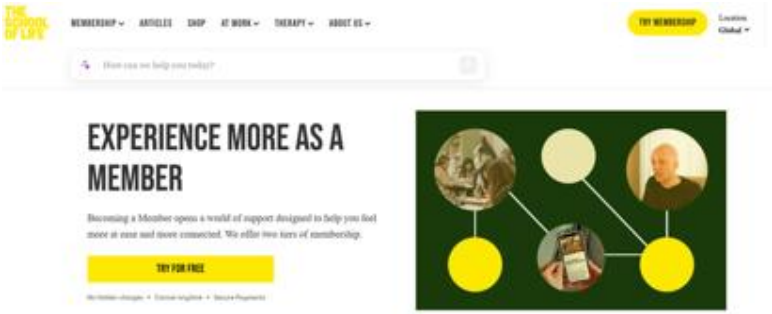
The perception gap study. Those who follow the news frequently over-estimate the difference by 3x times.

3x



At the end of the day, I only trust myself and my family, and a few select friends. When it comes to media, platforms and such, I take everything with a grain of salt and do my own research

FEMALE, 43



SUBJECTIVE REALITIES

What we're seeing





WONDERFULLY
WEIRD



February 2026:

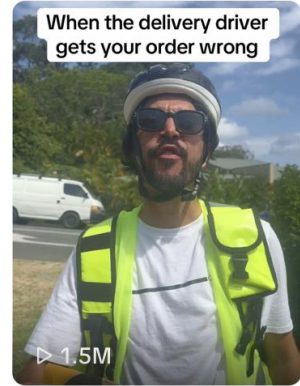
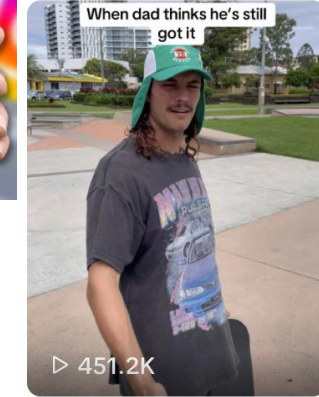


47%

Are more likely to
respond to
authentic,
unpolished ads.

IMPERFECTION

RELATABILITY



@ReesBros 1.2m
followers for just
funny related content
moments

Dudes be like "I'm in a pickle"

Oh really? This you?



I applied to a job 45 mins ago and they've
already emailed me saying no 🍷



Hopefully no one reads this straight
across from left to right like I did...



ULTRA
SPECIFIC

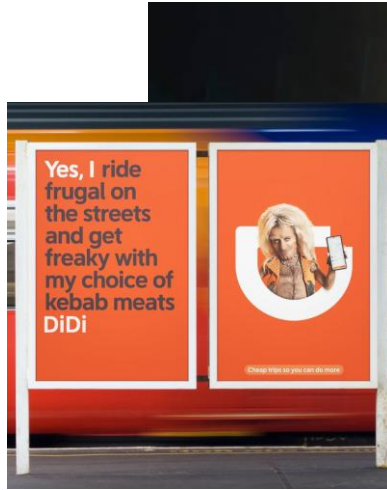


I feel like what I trust the most is random TikToks
from small creators that are clearly just everyday
people sharing their opinions. In this current day
and age it can be hard to tell when things are paid
advertisements which makes me not trust big
influencers even if I like them and their content.

MALE, 26

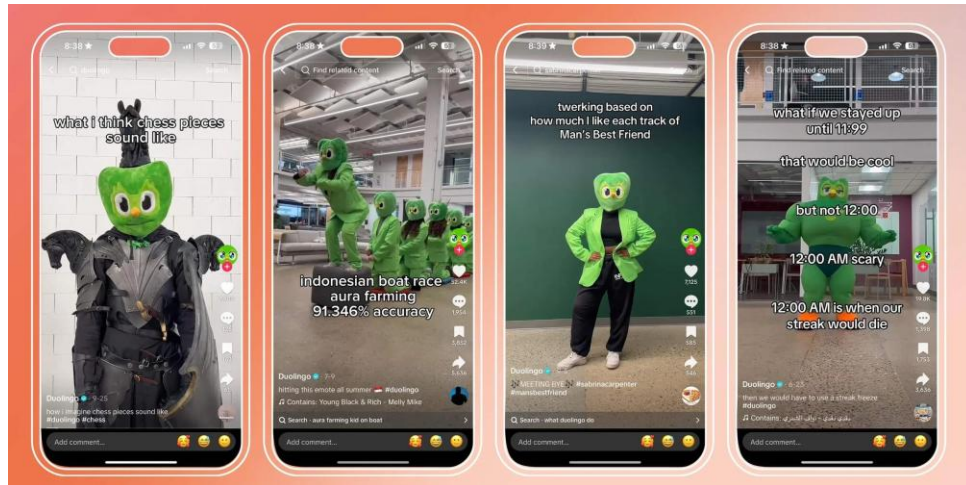
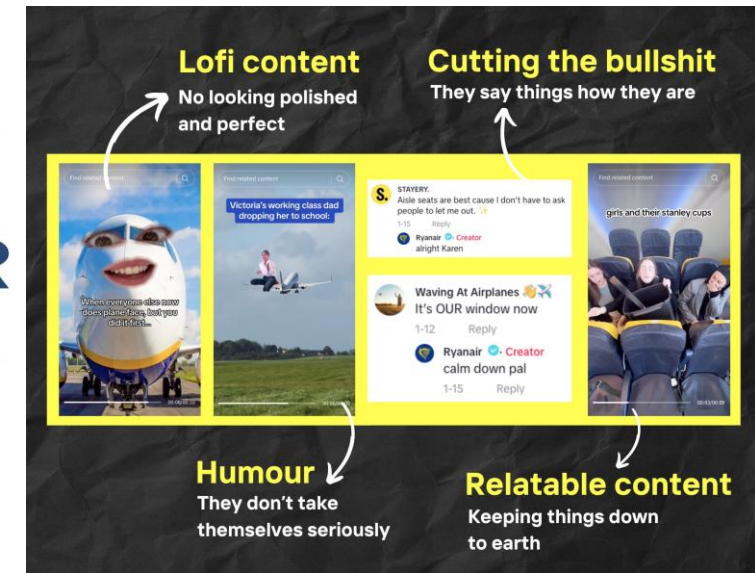
Give it to me real

Consumers are trading polished perfection for human proof,
looking for the cues that something was created by a real person.



GIVE IT TO ME RAW

What we're seeing



DECLINING
TRUST

r/amazonprime

1y ago

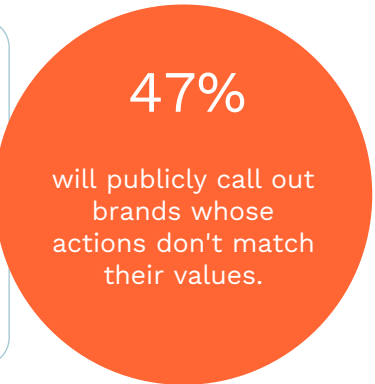
TysonStone1999

Amazon has become Temu trash

SunDriedFart

1y ago

absolutely agree, i find myself now going to well known, reputable manufacturers websites and happily spending more money on a proper product. I only keep Prime for the cheap crap that doesnt need to be the best quality however i am getting increasingly closer to cancelling my membership after about 20 years.



PROOF
CULTURE



RADICAL
TRANSPARENCY

Proof over promises

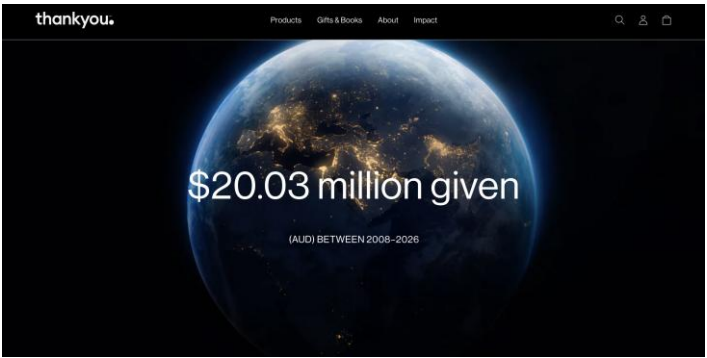
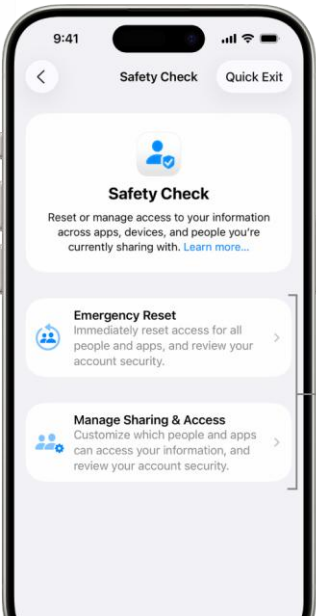
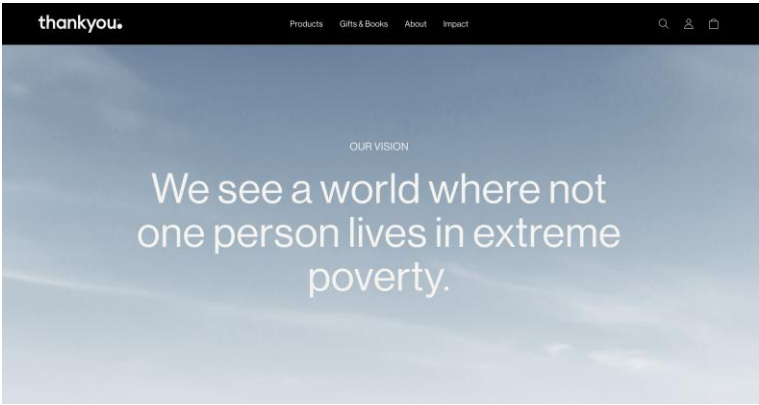


Consumers don't trust what brands say anymore.
They trust what brands are willing to show.

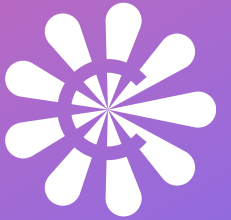
15%

Actively researched a company's practices before supporting it last year, and 17% plan to do so this year - small but growing.





Opportunities



ARE YOU SPENDING TIME IN YOUR CONSUMERS SHOES?

Do you know what people say they want, or what the media is telling you they want?

CHECK WHAT YOU ARE SIGNALLING?

Is your business signalling trust and authenticity?

What do you need to shift to deliver on this?

ARE YOU LIVING YOUR PROMISE?

Are all parts of your business delivering this?

RELATEDNESS

RECONNECTING

Relatedness is the need for mutual belonging, Technology now mediates more of daily life, and people are spending more time alone because of it. But the pull toward human reconnection hasn't disappeared, it's just become something people have to work at, not something that happens by default.

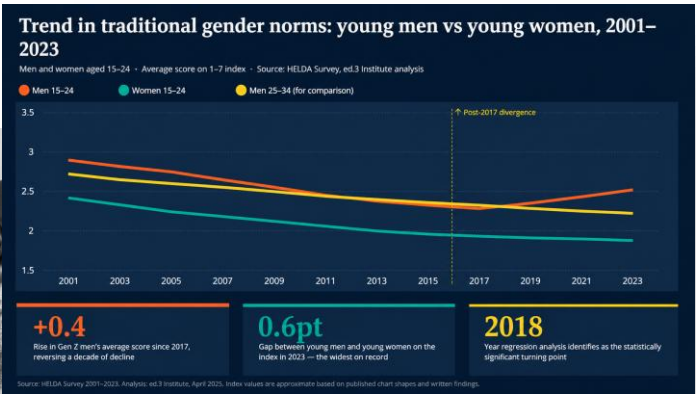
RENEGOTIATING HUMAN VALUE	3.3
LOW EFFORT BELONGING	3.2
MENTOR VOID	3.1

MENTOR VOID

As the world has grown more complex, traditional structures that helped people navigate this have been eroded.

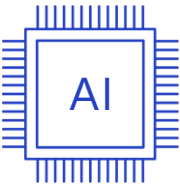
People aren't just looking for someone to explain the world to them, they want to be seen doing it.





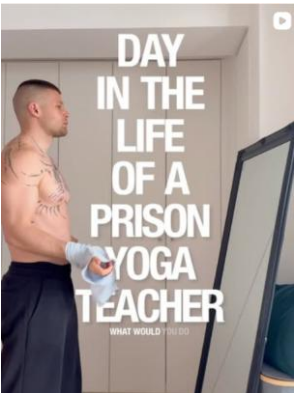
Guidance gap

Guidance gap is felt and accepted as a given.



9%

Only 9% of the Australian population sought a person out in the last 12 months.



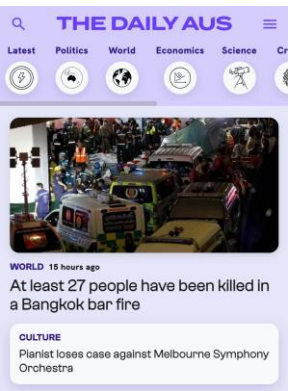
The relationship is as important as the advice given. It's as much about being seen.

RHODES MODEL OF MENTORING (2005/6)



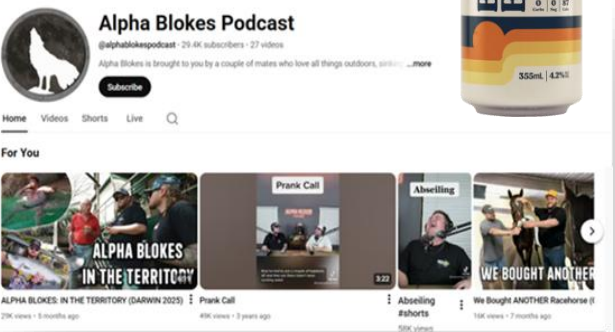
PODCAST
HOSTS HAVE
TRIPLE THE
INFLUENCE OF
CONTENT
CREATORS

The Rise of "Social Search" & Finfluencers - Younger consumers are looking for "people like me" rather than "experts in suits." or celebrity endorsements



Friends and family recommendations are their most trusted source across almost every product category tracked - consistently the #1 source ahead of experts, brands and reviews

GUIDANCE GAP



40%
of men under 25
listen to
a podcast every day.
(Podpoll 2025)

I do follow ONE influencer. Nectoriouspapi who is a food blogger from Victoria. I actually like him as he is very down to earth and also lets me know about all the weird and wonderful new foods and drinks as they become available.

MALE, 54

HABITUAL BELONGING

The web of mutual recognition that made people real to each other has quietly come apart. Belonging used to be structural, it came with the territory of where you lived, what you did, who you worshipped with. Now belonging is entirely elective.





VILLAGE BUILDING



SOCIAL BATTERY MANAGEMENT

Human snacking

Consumers are snacking on connection seeking smaller, more manageable moments of community that fit around increasingly stretched lives.



Small, low effort connection, is already our preferred mode of socialising (SaySo, 2026)

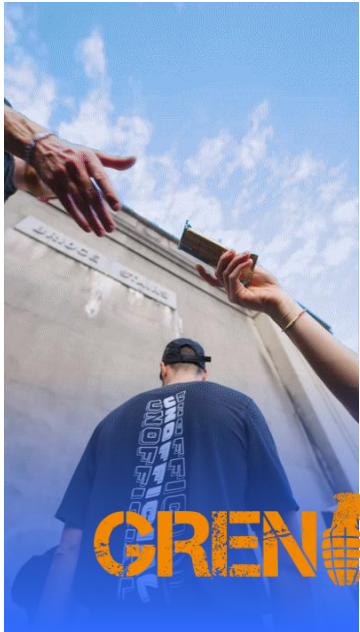
I feel really lonely and really upset when I'm on the train by myself because I will spend upwards of an hour and 30 minutes getting to and from unit and that whole time I'm just uncomfortable and jealous of the people who have someone to talk to.



FEMALE. 20



The 5th space



RENEGOTIATING HUMAN VALUE

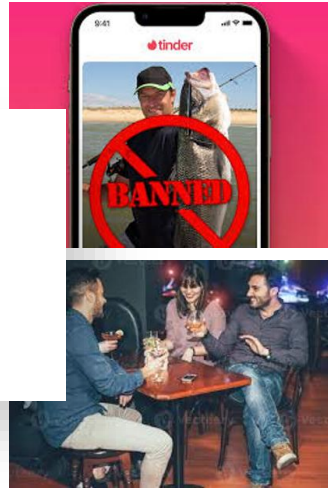
In a world of AI-generated content, dupes and endless performance, people are beginning to question what is real, earned and genuinely human.





Inside the Luddite Festival Harnessing Gen Z's Rage Against Big Tech

New York City's Summer of Ludd festival is teaching people how to live offline amid the suffocating presence of Big Tech.



31% said they felt deceived or misled to find out after the event, that something had been created with AI

31%

48% Doing things that feel meaningful or significant

48%

O2BHmn

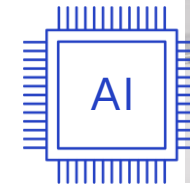
MADE BY

HUMANS



AI free
100% HUMAN ART

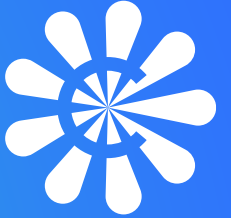
SUPPORT ARTISTS!



I feel overwhelmed by how easy AI has merged into social media & sometimes struggle to differentiate what's real or not & that makes me hesitant to put much trust into anything I see.

FEMALE, 29

Opportunities



CAN YOU HELP SUPPORT THE VOID?

How can we support people getting the right skills and support they need to navigate the world?

HOW DO YOU HELP CONNECT CONSUMERS?

How can we support the village?
How do we support more moments of habitual belonging.

HOW DO YOU HELP PEOPLE BE HUMAN?

There are going to be a lot of questions in this space, how can we help? Where do we play, what role will people & AI play in the future.

A young man with dark, braided hair and a serious expression is the central figure. He is looking directly at the camera. Three hands hold smartphones up to his face, each displaying a different close-up of his features. The top-left phone shows his eyes and forehead. The top-right phone shows a close-up of his eye. The bottom phone shows his nose and mouth. The background is a plain, light blue-grey color.

Questions?

Tgarage CONSUMER MARKET INTELLIGENCE PLATFORM



Facilitated Workshops

DIAGNOSTIC AUDIT

Map the client's brand against the data.

01

MAP

Pre-workshop: plot the client's brand or category against the cohort data.

02

FLAG

Identify where they're over-indexed on an outdated assumption, or blind to

03

ANCHOR

Ideation ties directly to the specific gaps found - not the themes in

Tgarage

PROVOCATION-LED IDEATION

Unsettle the room, then build from the gap.

01



PROVOKE

Open with a disruptive stat, verbatim, or image - no context given yet.

02



REVEAL

Show the Culture Cast data behind the provocation, and let the room recalibrate.

03



DEFINE

SIGNAL TO BRIEF TRANSLATION

Turn each Culture Cast theme into a ready-to-use planning brief.

01

SIGNAL



02

TENSION



03

OPPORTUNITY



FORMAT:

Small groups, each assigned one theme and one brand.



OUTPUT:

One opportunity brief per theme - planning-ready, ready to hand to a strategy team the same day.

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OUTPUT:

A gap analysis plus a set of brand-sp



FORMAT:

Full-room brainstorm, loosely facilitated to keep energy high.



OUTPUT:

Further-out territory concepts and comms ideas that go beyond increme

Stay in Touch!

(we love our community)



Jed Simpfendorfer

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Tgarage x *ONE FEATHER*