

TRA

the *growth*
d_stillery

THE



UNFILTERED SELF



MARKETING'S

NEW DUALITY



The Unfiltered Self: **Marketing's New Duality**

The ever-evolving digital landscape has created an environment where we are increasingly cautious about our online presence, resulting in a generation of Australians with multiple 'selves'.

A highly curated but deeply cautious "Filtered Self", alongside our true "Unfiltered Self" which exists separate from our projected digital personas and may only be shared with a trusted few (if at all).

This duality poses a critical challenge for publishers, marketers and advertisers: Are we truly connecting with our target audience or merely engaging with their curated personas? And how then can brands build authentic connections with their 'unfiltered' audiences; cutting through the noise of social desirability bias, curated personas, inauthentic engagement and suppressed opinions?

In partnership with TRA, News Corp Australia set out to achieve the following objectives:

1. **Prove** the filtering dynamic & why it exists
2. **Explore and measure** how filtering manifests (the hot spots)
 - Who?
 - Who with?
 - Where? Channels?
 - What topics?
3. **Validate** the benefits of effectively engaging the unfiltered self (the commercial imperative)
4. **Direct** marketers/brands on how to engage



A GLOBAL PANEL OF EXPERTS THAT WE'VE COLLABORATED WITH



Dr Kristy Goodwin, Digital Wellbeing Researcher
Global speaker, author, researcher and media commentator.



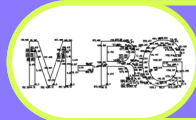
Prof. Amanda Gordon, former President of the Australian Psychological Society



Brady Robards, Associate Professor in Sociology at Monash University
Author and researcher specialising in the intersection of youth and digital media.



Jessiah Cocks, Psychologist



Ryan Lynch, Strategist and Co-Founder of M-RG



Tama Leaver, Professor of Internet Studies at Curtin University
Author and researcher specialising in privacy and rights in an online world.



Agalia Tan, Planner at We Are Social & Freelance Contributor to RADAR
Radar is a decentralised global collective of over 300+ researchers, early adopters and innovators.



Jordan Taylor, Lecturer
University of Pennsylvania
(philosophy, sciences of mind)



Senior Lecturer, The University of Melbourne



Noelle Faulkner, Cultural Writer and Strategist
Over 15 years experience in media and content writing for some of the worlds most prestigious brands.



Dr Lauren Gurrieri, Associate Professor of Marketing, School of Economics, Finance and Marketing, RMIT University
Dr Gurrieri's research examines gender, consumption and the marketplace, with a focus on gendered inequalities in consumer and digital cultures

WITH THOROUGH PRIMARY RESEARCH FOLLOWING OUR EXPERT ENGAGEMENT

IDENTIFY

Cultural context deep-dive

11x expert and creator
interviews

ENRICH

16x Friendship Triads (N=48)

90 minutes

3 day extended private Vault
reflections

- Conducted between 5th June -
18th June 2023 both in person
and online
- Age between 18-64
- Mix of metro and regional
- Mix of NSW, VIC, QLD
- Mix of household structure,
income and social media use

AMPLIFY

Quantification and
sophisticated modelling to
determine purchase ease
relative to safety and interest
statements.

20-minute online quantitative
survey

N=2162

National representation within
Australia, aged 18+.

WHAT THIS WILL COVER

1

**OUR UNDERSTANDING
OF FILTERING AND IDENTITY**

**WHAT DOES THIS
MEAN FOR BRANDS?**

2

3

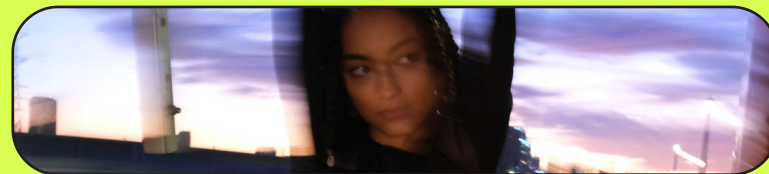
**THE MARKETING LEVERS
MOST POTENT IN BUILDING
CHOICE IN THIS CONTEXT**

01 OUR



UNDERSTANDING

OF FILTERING



AND IDENTITY



Identity is shaped by how you perceive yourself and how you believe others see you

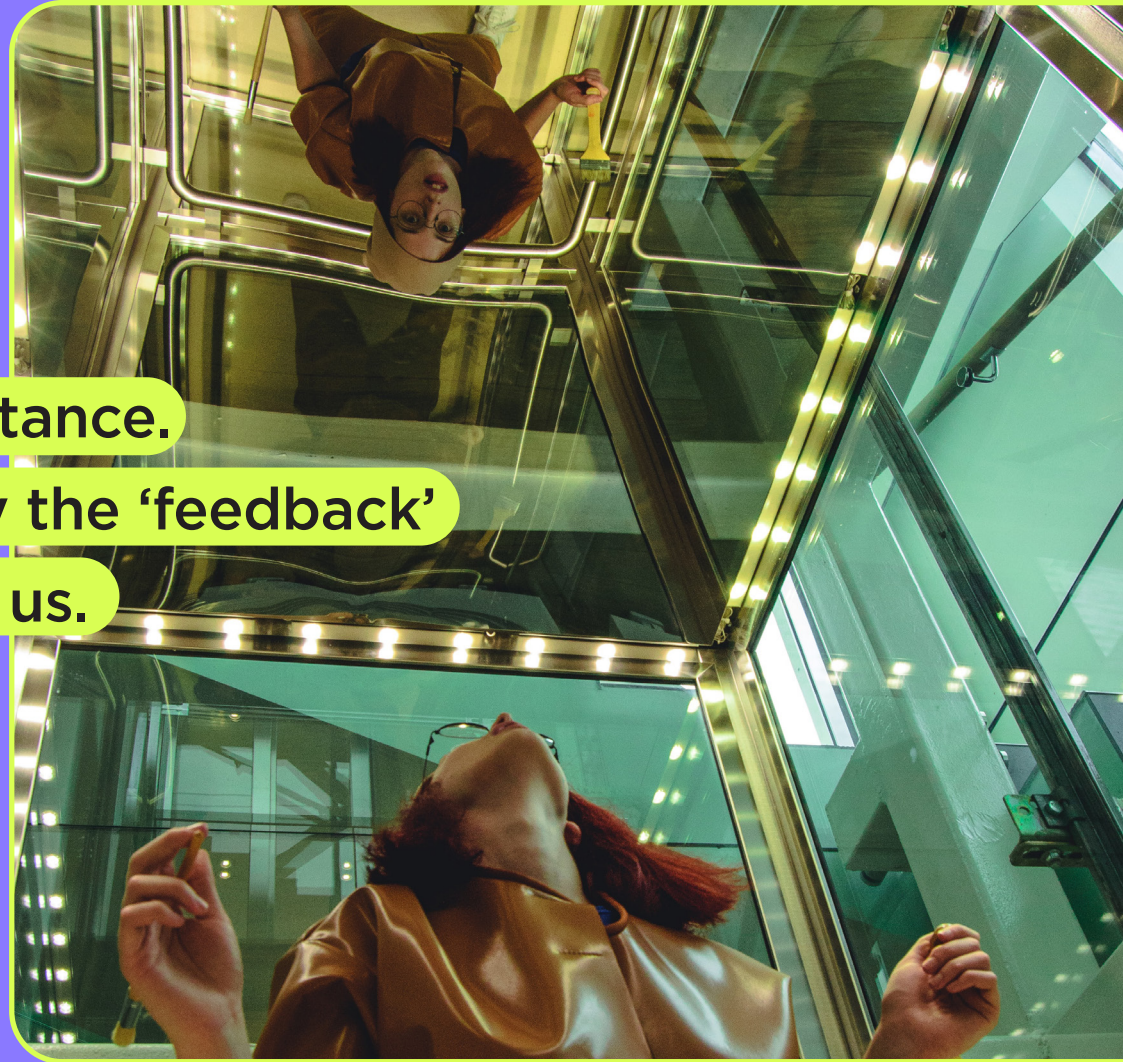
People have a deep need for acceptance.


From a young age, we're shaped by the 'feedback'

we receive from the people around us.

Consciously and unconsciously, we examine ourselves through the lens of others' perspectives, re-calibrating based on the response we receive from others.

This feedback response is the information and opinions we receive from others to help form our understanding of social norms, social expectations, role identity and validation.





Multiplicity suggests that human identity isn't singular, but an **intricate interplay of diverse identities**, roles, and social constructs shaping one's self-perception

What 'self' we express is contextually shaped

We adapt what we express of our identity based on the feedback of real or imagined audiences.



ERVING GOFFMAN'S PRESENTATION OF EVERYDAY SELF

Sociologist Erving Goffman compares this interaction to actors performing on stage, where the 'actors' gain immediate feedback from the audience.

This '**front stage**' is where individuals are in a constant state of impression management. Whether this be crafting and curating behaviour, appearance or communication, people adhere to social norms, specific roles that follow social scripts accepted within the context.

The '**back-stage**' is the private context, where people can be their true selves and relax from the demands of the front stage performance. There's less pressure to conform to social norms or expectations.

Not all contexts are as black and white as this, people are in a constant state of flux between the two stages within different contexts.



CHARLES COOLEY'S LOOKING GLASS SELF

The "looking-glass self," a term coined by sociologist Charles Cooley, describes how we form our self-image by imagining how others see and judge us. It's like looking at ourselves through a mirror of other people's perceptions, helping us understand how we fit into the world around us.

Our sense of self is constructed in different social settings. It's like using a mirror to see ourselves through the eyes of other people.

“

*“The imaginary audience is something that is particularly used by young people. And it is to practice social **impression making**. Young people imagine an audience while they’re by themselves. The thinking behind it is that it’s a way of **practising for when the audience is real**. But we all have it to some extent.”*

JESSIAH COCKS, REGISTERED PSYCHOLOGIST

“

*“Identity and gender in society is having **markers removed**, and because we are taking away these markers, it removes people’s sense of belonging in a social group. There becomes more and more of a problem with people floating.”*

AMANDA GORDON, ARMCHAIR PSYCHOLOGY,
FORMER PRESIDENT OF THE AUSTRALIAN PSYCHOLOGICAL SOCIETY

“

*“**Social acceptance is the premise of the human condition**. That’s the point. That’s the reason we’re still here.”*

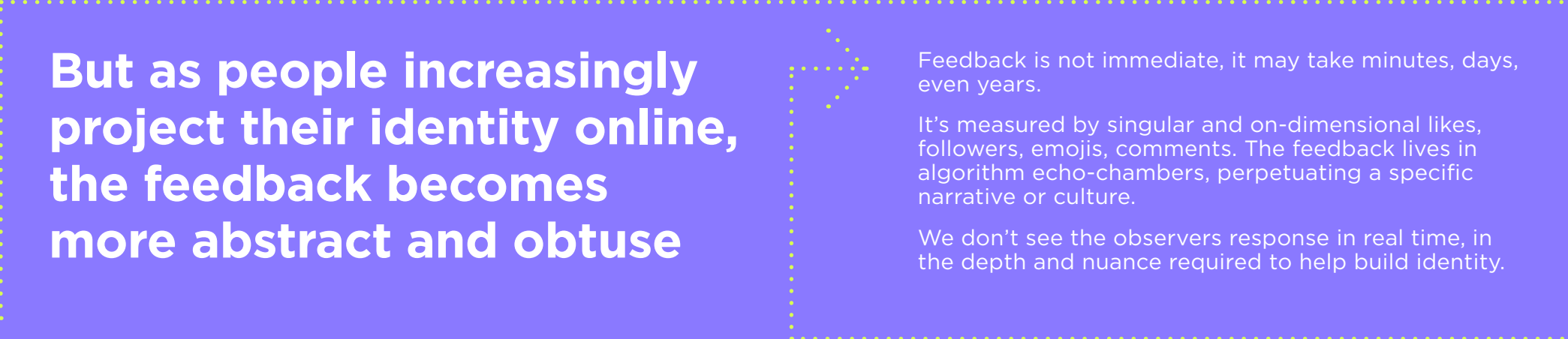
RYAN LYNCH, STRATEGIST &
CO-FOUNDER OF M-RG



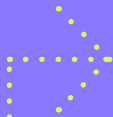
In real life, feedback is immediate and the context is easy to understand

The audience within the physical context is clear, there's immediate accountability and response to our actions, words image.

We have an arrange of tools to measure feedback - verbal tone, body language, facial expressions, language.



But as people increasingly project their identity online, the feedback becomes more abstract and obtuse



Feedback is not immediate, it may take minutes, days, even years.

It's measured by singular and on-dimensional likes, followers, emojis, comments. The feedback lives in algorithm echo-chambers, perpetuating a specific narrative or culture.

We don't see the observers response in real time, in the depth and nuance required to help build identity.

FEEDBACK HAS CHANGED WITHIN THE ONLINE CONTEXT

The feedback people receive is often based on historical data

People receive feedback on what they've posted, commented, shared online today, yesterday, or over 10 years ago.

Actions are more permanent.

Feedback is less nuanced and more binary

Studies show that text-based communication triggers an increase in the stress hormone cortisol.

The smiley face :) was invented to build cues in text-based communication. There's now over 3,000 emoji characters in the Unicode Standard library.

Feedback can be more extreme

The online Disinhibition Effect has created extremes in feedback people receive - often more negative than what would be said to a person's face.

What is the Disinhibition Effect?

The disinhibition effect refers to the tendency for individuals to exhibit more unrestrained and bold behaviour in online environments compared to their in-person interactions, often due to a sense of anonymity and reduced social consequences.

The markers to feedback on are intangible and self-confirming

The 'markers' of identity are more intangible and ephemeral in an online context. Online life has de-materialised the physical possessions that used to define identity. Now, rituals and behaviours define identity alignments.

People can get stuck in their own algorithm echo chambers that reinforce and perpetuate ideas.

“

*“I think it’s an age thing. But I also think that it’s the age of social media. When you’re 18, and you grow up, and then you’re 23, it’s different of how you perceive social media, you’re going to be **more careful**. I also think it’s got to do with how social media was introduced into your life. When we were younger, social media wasn’t so prominent. So, when it came out, we were still quite **weary of it**. But I think teenagers now they grow up and social media is already there. And they’re using it when they’re so young. So, I feel like when they get older, it’s just going to be normal. So, they’re going **to feel more comfortable** to post things that they maybe shouldn’t.”*

FEMALE, 23, SYDNEY

“

*“Once something is online, it is **online forever.**”*

MALE, 39, SYDNEY

“

*“I don’t think older people think too much about what they post online. It is just because they just want to share, it is important to them. **I feel like for young people, there’s an ulterior motive.** For young people they take 1000 photos and have to pick one. It is staged.”*

MALE, 25, SYDNEY

“

“When people friend someone new, like it might be a work colleague, or someone I met on a date. **They go back and look at the Instagram grid, for example, through the eyes of that person.** They are kind of reassessing how they **manage their impression**, oftentimes in quite **historical terms through a new person’s perspective.**”

BRADY ROBARDS, ASSOCIATE PROFESSOR IN SOCIOLOGY AT MONASH UNIVERSITY

“

“A lot of studies have found that when we use **text-based communication**, our brain does a couple of things, it **increases our cortisol**, which is our stress hormone. When our eyes converge, it triggers a message to our brain, I’m in a stress response because as humans were designed to look out in the distance, we’re designed to dilate our gaze. So just the mere act of looking at a screen can trigger the stress response. When we’re **standing in a room with real people**, our brain makes far more **oxytocin**, the social bonding hormone.”

DR KRISTY GOODWIN, DIGITAL WELLBEING RESEARCHER

“

“The fact that one of the first things ever invented, when we started just having an email communication was the **smiley face** because we needed to know if someone was **making a joke or winking** because **we read all of those cues. We don’t even know that we’re reading cues until they’re absent.**”

TAMA LEAVER, PROFESSOR OF INTERNET STUDIES,
CURTIN UNIVERSITY

The blurring of audience in social media has resulted in a 'context collapse'

The '**context collapse**' refers to the blurring of boundaries between different social contexts online – posts and activity are visible to a wide range of people, including friends, family, neighbours, colleagues, acquaintances and even strangers.

Social media initially encouraged everyone all in one place with one identity, over time other features or platforms have accelerated in popularity that encourage more intimate interactions. Despite this, the lack of perceived control online still exists.

Pre-2013

Internet norm is using aliases on forums.

2003

Myspace and Facebook (2004) introduced and shifted the norm to using your real name on the internet through one profile.

People are encouraged to share life's moments in detail.

2009

Facebook begins offering users the ability to choose the audience of individual posts.

2010

Instagram launched, with a billion users by 2018.

2013

Facebook introduces the feature to mass restrict past posts and allow users to hide their profile from searches.

2018

Instagram launches 'close friends', a private list of people to share content to exclusively.

Messaging server Discord starts to become more popular with 45 million monthly active users, with over 140 million in 2023.

2020

BeReal launches with a mission to encourage more 'authentic' portrayal of life moments online.

Within this 'context collapse', inertia takes hold

It becomes too hard for us to determine the right behaviour within the online context.

There's a lack of a defined audience to gain feedback from.

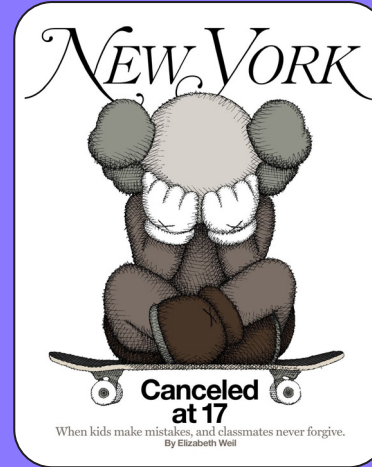
There's low control of how the things people post, comment, and share are received.

The intention and what's received can be misconstrued.

The long memory of the internet makes us pause and calculate the risk and reward of sharing, this 'pre-cancellation fatigue' built with the hangover of seeing celebrities and figure-heads face the ramifications of actions years ago.

What is pre-cancellation fatigue?

Asynchronous conversation has given us more time to consider what we say next. The long memory of data makes us pause and calculate the risk and reward of sharing unfiltered opinions.



SOURCE: New York Magazine, 2022

*"40% of Gen Z's surveyed said they are more likely to strongly/somewhat agree that the rise of cancel culture has meant they are **increasingly self-censoring** when and with whom they share their opinions. 40% cf. 37% Gen Y, 27% Gen X, 21% Baby Boomers, 21% Builders)."*

SOURCE: McCrindle Research, 2022

i·D

Twitter is dead, Instagram is over and TikTok is toxic

Enter a new wave of Gen Z platforms that promise users an inoffensive internet. But at what point can a safe haven become an echo chamber?

"As the internet's town squares set themselves on fire, young people are cultivating greener pastures, building a new wave of saccharinely-positive social media apps for Gen Z. But at what point can a safe haven become an echo chamber?"

SOURCE: I-D Magazine, 2023

“

*“It wasn’t really until Facebook became the dominant platform, that the **idea of using your real name on the internet became quite common like before that people usually use some kind of alias or a pseudonym.** It was very unusual for people to put their real name up on the internet. **And now of course if you’re not using your real name, you have something to hide.**”*

*So, what happens when Mark Zuckerberg applies this one identity philosophy to **Facebook** as the biggest platform, it has a **really interesting effect on how we think about our identities.** That the idea of what **we think of as authentic and how we reveal ourselves selectively on the internet is different.**”*

BRADY ROBARDS, ASSOCIATE PROFESSOR IN SOCIOLOGY AT MONASH UNIVERSITY

“

*“**We underestimate how much of life is filtered** and how much of what we **present on social media is not reality.** Because reality in **real life is messy.** But when you’re having to present some kind of a filtered version of it, it’s not ever going to be nearly as messy as life actually is.”*

NOELLE FAULKNER, CULTURAL WRITER AND STRATEGIST

“

*“Online spaces are unique in that the **scale is bigger than ever.** You’re blinded to who’s seeing (you). Why people are **scared or filtered** is because the more people you have to speak to, **the more simplified you have to be,** the more you’re worried about misrepresentation. You’re constantly speaking to a crowd online. A crowd that would never all be together IRL..”*

RYAN LYNCH, STRATEGIST & CO-FOUNDER OF M-RG

“

*“We’re all essentially **seeking approval.** When it comes to rejection, or approval, it needs to be **active; approval doesn’t happen by omission.** But people do perceive that sometimes rejection can happen by omission. To get someone’s approval, I need to actually get positive feedback. Perceived rejection can be, you know, apathy or ambivalence. I think that’s the main difference, particularly **when it comes to online stuff, the lack of engagement with what you’re saying, can be perceived as you just completely missing the mark, when it might not be.**”*

JESSIAH COCKS, PSYCHOLOGIST

A silhouette of a person's head and shoulders, facing right, with their hand resting on their chin in a thoughtful pose. The background is a dark, textured blue.

A prevailing factor to what we feel comfortable revealing of our identity is based on the **perceived safety** of a context

Perceived safety is our subjective assessment of how safe we *feel* in a context, based on the feedback we receive.

We define perceived safety on the following factors

Every context and relationship has the following contributing factors.

Every context will look different but will contribute to an overall feeling of high or low perceived safety.

LOW PERCEIVED SAFETY

Uneven power, guarded or closed off

One-way, uneven share of voice

Conflicting values and beliefs, diluted interests

Lasting impact, high permanence, unbalanced control

Judging

High cognitive load

Low familiarity, lack of experience

HIGH PERCEIVED SAFETY

Equal power & mutual vulnerability

Equal and open dialogue, conversation

Shared beliefs, interests and values

Low permanence, mutual control

Acceptance

Low cognitive load

High familiarity, long term experience

“

*“**Perceived power** is important. When we are of equal power, we are more likely to reveal. If someone is more powerful than I am, then I will try and work out what do they need to know about me that will make them are about me.”*

AMANDA GORDON, ARMCHAIR PSYCHOLOGY, FORMER PRESIDENT OF THE AUSTRALIAN PSYCHOLOGICAL SOCIETY

“

*“The nature of **social media** is that a lot of the posts we put up are kind of **persistent by default**, like on the Instagram grid, or a Facebook Timeline, or a Twitter archive. Whereas the impressions we give off in **everyday interactions**, they kind of **fade** unless they’re recorded. They’re kind of persistent by default nature of social media and internet identity, radically kind of changes the way we think about our digital footprint.”*

BRADY ROBARDS, ASSOCIATE PROFESSOR IN SOCIOLOGY AT MONASH UNIVERSITY

“

*“You’ll often see that **joy is kind of over expressed online**. And **anger is over expressed as well**. There’s certain amplification effects online of not having to have that immediate accountability and not having to present in a sort of pleasant or a polite manner. **There’s not the same fear of backlash or fear of judgement compared to in person.**”*

JORDAN TAYLOR, LECTURER AT UNIVERSITY OF PENNSYLVANIA (PHILOSOPHY, SCIENCES OF MIND)

When perceived safety is low, people flatten their identity to conform

People play into ‘templates’ to easily identify and conform with an existing group in order to feel safe.

Going against the tide and raising your head above the parapet feels risky.

Opting for the fence offers no friction.

What are some examples of ‘templates’?

‘Templates’ are patterns or trends that have become normalised within a group or on a social media platform, thus becoming a safe way to express yourself or conform to. For example, it might be a certain fashion style to identify with Gen Z, or overly aesthetic and perfect imagery shared on Instagram.

“

*“**Social media’s template** makes it feel like people are misleading others because it’s a **small snapshot.**”*

FEMALE, 30, VIC

*“I got rid of half of my followers because I realised that **I didn’t know them in real life at all.** And I didn’t know them personally. When I got out of high school, I was just a bit weirded out by how many people knew me by my Instagram name, which was a bit odd to me. I just decided to get rid of the people that I didn’t know. And just keep the people that I either knew through someone else or people that I liked what they like, things or fashion pages or something like that, or main pages.”*

FEMALE, 22, VIC



HIGH FILTERING = HIGHER ANXIETY

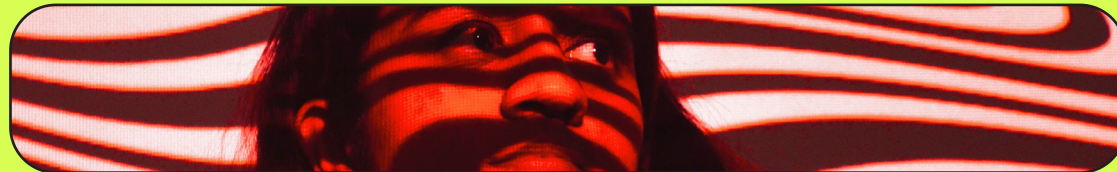
We become hyper aware of how our choices reflect our identity and filter what we show people.

It's cognitively overwhelming, there's high anxiety about getting it wrong, putting us into a highly rational state.

*“In this **“woke society”**, I feel that we will need to be very careful about what we say/post, as things can be taken out of context and misconstrued. We live in a highly litigious world, and the **world has become a very small place.**”*

FEMALE, 67, NSW

02 WHAT



DOES THIS MEAN

FOR BRANDS?



In a low perceived safety context and mindset, purchase decisions are harder to make

Operating in low perceived safety requires more effort,
it requires cognitive thought and people are more cautious.

We define **high perceived safety** in the purchase choice context as the following:

- High confidence & familiarity with the options available
- Low judgement from others
- Low stakes in the decision (low loss aversion)
- Low impact on others
- Not needing advice from others
- Comfortable with sharing choices with others



Perceived safety trumps personal interest and investment

Driving personal interest and investment in a brand or category is still important. But ensuring we deliver a sense of safety is critical.

60 : 40

PERCEIVED SAFETY

When people perceive themselves to be in a safe environment, they make purchases more easily and readily.

Creating this safe environment will contribute to 60% of ease of purchase movements.

PERSONAL INTEREST

When people are passionate and invested in a category emotionally, they make purchases more easily and readily.

Sparking this interest within your category will contribute to 40% of ease of purchase movements.

There are some nuances that exist with different age groups

Young people are still forming their identity. People who are older tend to have a stronger sense of self.

The Erikson Stages of Psychosocial Development help explain why we see this difference in age groups.

Within **early adulthood**, the main 'conflict' or 'tension' is between forming more intimate relationships with others and being isolated or lonely. At this stage of 18-40 years old, people still require feedback to form deeper relationships.

Ease and perceived safety comes from navigating who they are - their values, interests - within safe environments.

From **40 years old**, people's identity is more well-formed. It is about giving back to others from their lived experiences.

Their identity and interests are more established.



"Identity construction for young people - tweens/ teens - is an enormous period of transition in which they are beginning to get to know themselves. So, by participating in different cultures and subcultures, they are offered a vehicle to understand who they are and who they want to be.

Older generations have acquired a better sense of who they are - although this is always evolving and changing. They're still drawing on lots of different resources, but there is a greater sense of stability in their knowingness of how to express themselves. This is an enormous distinction from younger generations."

DR LAUREN GURRIERI, ASSOCIATE PROFESSOR OF MARKETING, SCHOOL OF ECONOMICS, FINANCE AND MARKETING, RMIT UNIVERSITY

This difference contributes to ease of choice in the purchase context

OVERALL EASE OF CHOICE

18-34		The younger generation on average find it more difficult to make purchase decisions.
35-54		People who are 35-54 find it somewhat difficult, on average, to make a purchase decision.
55+		On average, people over the age of 55 currently don't find purchase decisions too difficult.

Source: TRA | News Corp Australia Unfiltered Self Quantitative survey 2023 - Nationally representative sample of 2,162 Australians 18+; 18-34 N=801; 35-54 N=818; 55+ N=543
For each category, do you find it relatively easy to make a choice on what to purchase? Average across 19 categories. Categories include Airlines, Fashion, Home Retail, Exercise Apparel, News & Current Affair Subscriptions, Events, Beauty & Cosmetics, Automobiles, Insurance, Banking, Feminine care & Hygiene, Investing, Personal Technology, Groceries, Entertainment, Property, Baby / Children's products & clothing, Alcohol, QSR



This difference contributes to ease of choice in the purchase context

The younger generation, on average, faces challenges when making purchase decisions. Their choices are often hindered not by a lack of knowledge about available options, but rather by a fear of making the wrong choice.

FACTORS OF PERCEIVED SAFETY

	I'm confident and familiar with the range of options available to me	I feel like I'll be judged by others based on the choices I make	The stakes are high if I make the wrong decision	I need to lean on advice from others when making choices	I think about the impact of my choice on others	I'm comfortable sharing with others my choices
18-34						
35-54						
55+						

AGREEMENT SCALE



Source: TRA | News Corp Unfiltered Self Quantitative survey 2023 - Nationally representative sample of 2,162 Australians 18+
18-34 N=801; 35-54 N=818; 55+ N=543

When making a purchase in the following categories, how strongly do you agree or disagree with this statement? Average across 19 categories. Categories include Airlines, Fashion, Home Retail, Exercise Apparel, News & Current Affairs Subscriptions, Events, Beauty & Cosmetics, Automobiles, Insurance, Banking, Feminine care & Hygiene, Investing, Personal Technology, Groceries, Entertainment, Property, Baby / Children's products & clothing, Alcohol, QSR

The younger generation typically have higher interest within their purchase compared to people over the age of 55

The younger generation seeks aspirational choices and presents a significant opportunity for unlocking growth, given their willingness to spend on personal preferences.

FACTORS OF PERSONAL INTEREST / INVESTMENT

	I care about the choices I make	I look for aspirational options	I'm personally willing to spend more than others would	I spend time thinking and researching options	I am personally passionate and interested in my purchase
18-34	Light Blue	Medium Blue	Dark Blue	Light Blue	Light Blue
35-54	Light Blue	Light Blue	Dark Blue	Light Blue	Light Blue
55+	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue

AGREEMENT SCALE



Source: TRA | News Corp Unfiltered Self Quantitative survey 2023 - Nationally representative sample of 2,162 Australians 18+
18-34 N=801; 35-54 N=818; 55+ N=543

When making a purchase in the following categories, how strongly do you agree or disagree with this statement? Average across 19 categories. Categories include Airlines, Fashion, Home Retail, Exercise Apparel, News & Current Affairs Subscriptions, Events, Beauty & Cosmetics, Automobiles, Insurance, Banking, Feminine care & Hygiene, Investing, Personal Technology, Groceries, Entertainment, Property, Baby / Children's products & clothing, Alcohol, QSR

This culminates in a difference of contribution between safety and interest amongst the age groups

Australian's over 55 under-index on personal interest. They are on average less likely to care about being invested in their purchases. This indifference leads to a greater weight of importance on delivering a sense of safety amongst this audience.

Perceived safety is still important for young people, particularly as they start from a lower current state than older people. They have a slightly higher contribution of personal interest when making purchase decisions.

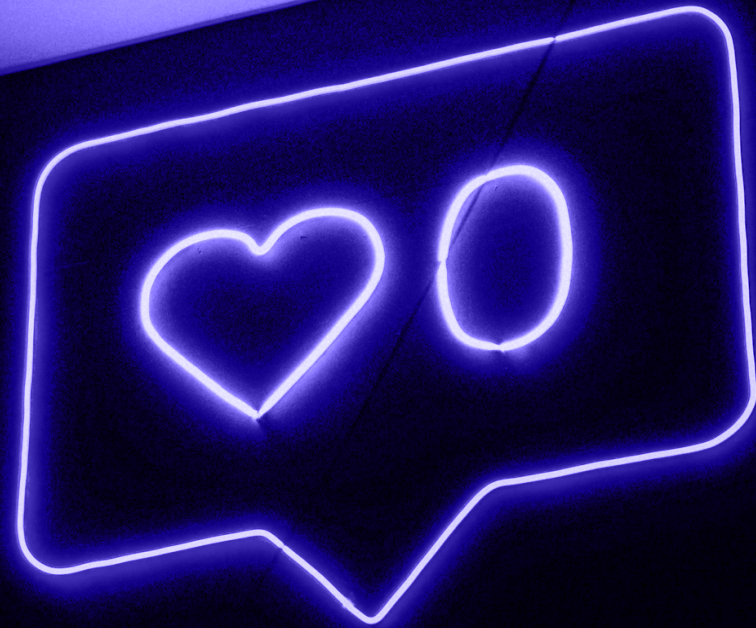
PEOPLE AGED OVER 55



PEOPLE 18-34



Why should
perceived safety
be important
for brands?

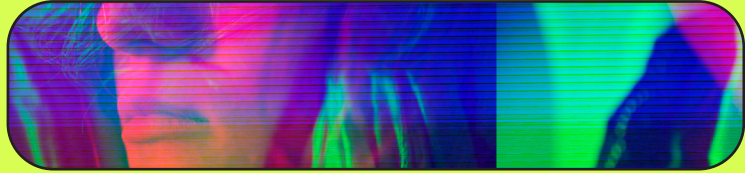


Perceived safety isn't a factor we can ignore.

Consumers are 34% more likely to choose when shifted **from low to high perceived safety.**

By increasing perceived safety, we're helping people make an easier purchase decision.

03 THE MARKETING LEVERS MOST POTENT FOR BUILDING CHOICE IN THIS CONTEXT



A guide for brands moving from low to high perceived safety.

“UNFILTERED TOOLKIT”

The most potent marketing levers in building choice in this context.

REFRAME THE ROLE OF NICHE

RETHINK INFLUENCE

HARNESS SOCIAL NORMS

BE CONSISTENT IN YOUR COMMITMENT

SHIFT FROM COACH TO COMPANION

PRIORITISE LESS OVER MORE

This toolkit will foster and build perceived safety drivers

Will lower power distance and mutual vulnerability

Will create equal voice / dialogue / feedback

Will build strong shared beliefs, values, interests

Will create high control & lower permanence

Will create an acceptance of any outcome

Will lower cognitive load

Will create long term experience or high familiarity



REFRAME THE ROLE OF NICHE

In today's context, niche no longer means small. Universal doesn't have to mean mass.

Driven away from a large single town square context towards tight-knit communities bound together through a specific interest, belief or value. With the internet's global reach, niche communities can now hold large numbers of individuals who are distinct due to their focused nature.

Algorithms on platforms such as TikTok are designed to feed content unique to people's interests, while others like Discord are designed for people to seek out like-minded individuals.

What drives perceived safety in these spaces is the focused nature and purpose of these communities.

The perceived safety drivers that will build within this marketing lever:

- Strong shared beliefs, values, interests
- High control & lower permanence

What does this mean for brands?

- There is so much content that people are subjected to that even if brands have a point of difference, it is easy to get lost in the 'noise of mass'. Attention is a premium, mass is just noise, and people are overwhelmed, seeking quieter dedicated spaces. It makes sense for brands to go there too.
- There's power in tapping into these 'niche' communities or even creating and fostering them, but there needs to be meaningful contribution and activation that align with your brand's actions and values.
- Meaningful contribution means enhancing the community for the better through real and tangible actions.

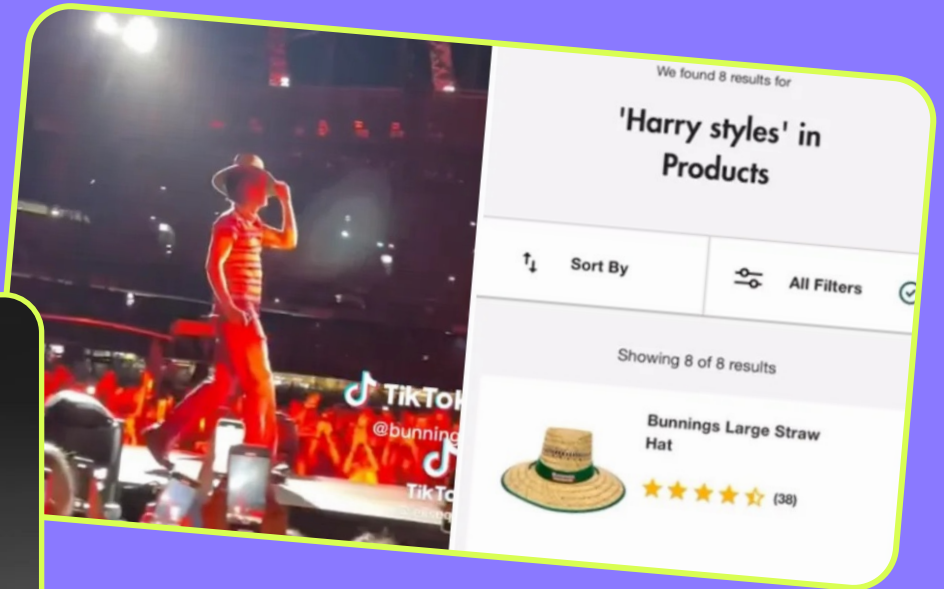
▶ REFRAME THE ROLE OF NICHE EXAMPLES FROM BRANDS



Duolingo, an language education app, has had immense success on TikTok through the use of their owl mascot entering niche and trending topics within the platform.



Launching in 2019, **Liquid Death** disrupted the water industry through it's water in a can format and its proximity to the death metal and punk music.



During Harry Styles' Australian Love on Tour show, he donned a **Bunnings** hat from a fan. Bunnings were quick to tap into the fandom of Harry Styles, gaining 1.1m views on TikTok (compared to their average 7000) and listing the straw hat under the search term 'Harry Styles' on their website.

REFRAME THE ROLE OF NICHE

“

“Previously, there were a **few core narratives** that seemed to be the cap of our attention capacities. Say, there’s three things that can be happening at once, directed by institutional resources such as newspapers. ‘This’ is what everyone’s talking about. Everyone watches a similar show. Everyone is aware of the same game that was on. Now there are seemingly **infinite narratives**, targeted to us algorithmically. Your sense of ‘reality’ is more predicated on your digital location than your geographic one. **It’s become exceptionally hard to find common ground.**”

RYAN LYNCH, STRATEGIST & CO-FOUNDER OF M-RG

“

“I think within groups of people with **shared values, there’s a perceived safety**. And I think that that is where the internet is. It’s a very, very good place for recruiting. And I don’t necessarily mean recruiting in a negative way all of the time. It’s a great place for recruiting friends, like when people young people love to go on Discord and Twitch, immediately the groups are within shared interests. And those shared interests pretty quickly can become fast, real friendships. **An example is the amount of young people who open up to friends in America that they have never met, when they’re not opening up to their friends in Brisbane.**”

JESSIAH COCKS, PSYCHOLOGIST

“

“What I’ve observed is that **fashion brands** today are playing an instrumental role in driving subcultures. When you are on an ASOS or Shein, you can navigate through the menu to explore different fashion trends. You’ll be able to browse fashion items for cottage-core or goth-core, for example. Suddenly, subcultures are commodified as fashion trends. Subcultures, don’t play the same role they previously did. They are now trend based, performative and surface level. The lifestyle enactment is less about community and more about aesthetics presented and displayed online.”

DR LAUREN GURRIERI, ASSOCIATE PROFESSOR OF MARKETING, SCHOOL OF ECONOMICS, FINANCE AND MARKETING, RMIT UNIVERSITY

RETHINK INFLUENCE

People are moving closer to smaller circles and forging stronger ties.

Our traditional way of thinking about 'influence' within the brand and social media context has been one-way, where the power sits with the 'influencer'.

A safe, open and trusting personal relationship is one that's of equal power. There's give and take, a dialogue, a conversation. This is true of building relationships with brands also.

Success is being found within contexts and approaches where the influence power is within the network, not with one person or entity. Influence is now in the hands of those that connect other people together through common interests. People are more sceptical of celebrities and influencers with large audiences due to paid endorsements from brands damaging trust.

The perceived safety drivers that will build within this marketing lever:

- Low power distance and mutual vulnerability
- Equal voice / dialogue / feedback

What does this mean for brands?

- Brands are finding success within channels and contexts that foster equal power dynamics between consumers, fans, people such as Threads, Discord, TikTok, Substack. These are typically places dedicated to representing people's interests, an area to connect, collaborate and communicate.
- Additionally, brands are being born out of communities that foster strong bonds and shared beliefs and values.
- Due to how algorithms are being updated, popular content is more valuable than number of followers. A single post can 'go viral' if it captures attention without a large follower base.
- The way of the traditional 'influencer' is changing, and people are becoming more sceptical of how brands activate with influencers. People are savvier in identifying sponsored content and are quick to call out brands and influencers who are disingenuous.

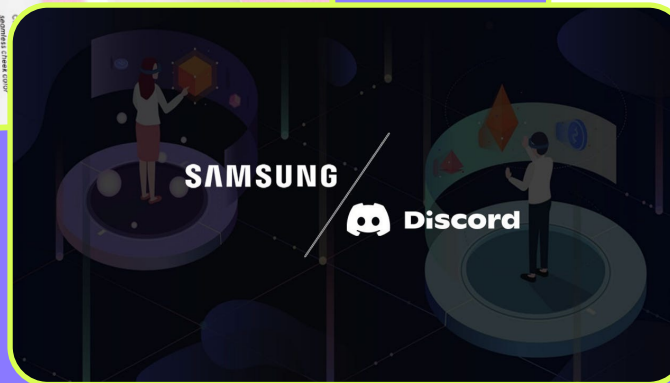
▶ RETHINK INFLUENCE EXAMPLES FROM BRANDS



Glossier, a billion-dollar beauty brand was born in 2014 off the back of the success of an online community and blog Into The Gloss.



Launched by YouTubers KSI and Logan Paul, **Prime** sports drink is targeted at their specific gaming community. With fans queuing to get their hands on the product, this is an example of a product specifically targeted to a clear niche fan-base.



Samsung US launched its first Discord server, with over 100,000 members joining in the first 12 hours of launching. Designed as a fun, interactive way for fans to talk to each other and gain exclusive access to products, events and NFTs.

▶ RETHINK INFLUENCE

“

“In 2019 there were all these **subcultures that existed on TikTok** that people didn't know existed, because the algorithm is so good at giving you what you want. I think it's **naive to think that all of TikTok is one thing when there really are so many micro communities like Reddit on there.**”

NOELLE FAULKNER, CULTURAL WRITER & STRATEGIST

“

“**Thank you has a great mission.** I was in the soap aisle looking for hand soap. Thank you always immediately stands out to me because of their charitable mission. I don't expect all companies to operate to the same extent but I would like each purchase to make a difference to the environment or someone in need. Whether that be a % of proceeds or matching a donation. **This builds a sense of trust and humanises the brand.**”

MALE, 24, NSW



“

“The ad stood out to me because it's just a picture of a **regular bloke, which contrasts the typical Instagram posts that might be bright, flashy, and especially designed to be eye catching.** Having a regular young bloke in the image would make people feel more included and feel that they are represented. This also puts a focus on men's mental health which is often an overlooked part of society.”

FEMALE, 25, VIC



HARNESS SOCIAL NORMS

As humans, we find safety when we follow the pack.

We build connection and safety through shared norms, behaviours and what we have in common.

These shared norms are familiar, we know and expect what the outcome is. Ultimately, this is a mental shortcut that makes it easy for us to make decisions.

The perceived safety drivers that will build within this marketing lever:

- Strong shared beliefs, values, interests
- Low cognitive load
- Long term experience or high familiarity

What does this mean for brands?

- Sometimes, a social norm is within a brand's favour. Other times, brands need to help reverse the trending social norm.
- Leveraging social norms and shared truths are a shortcut to familiarity and relevance.
- Being aware of the conversations that exist around a brand's category or specifically about a brand within niche or tight circles is important to understand and either flip or harness.

▶ HARNESS SOCIAL NORMS EXAMPLES FROM BRANDS



McDonald's eyebrow advert uses a universal behaviour to create a relatable moment that people can laugh at.



In the context of **Lululemon** 'dupes' gaining momentum in social circles, the brand looked to reverse this conversation online by hosting an in-person 'trade in your dupes' event.



In response to criticism, **Oatly** developed the F*ck Oatly website, which compiles all of Oatly's negative reviews and PR onto one website, addressing negative stories about the brand and their corporate behaviour and inviting you to click on an 'I hate Oatly' button.

HARNESS SOCIAL NORMS

“

“With commercial brands, like Duolingo on TikTok, they really tried to create a **persona around the brand**. Lotus Cars is another example, they got a Gen Z kid to start doing their TikTok and they were doing all these unhinged memes and shit-posting and everyone was like, ha ha ha aren't these brands so funny. You also start seeing Burger King respond in a funny way to a 7/11 post. People start getting over it, because you can't create a persona out of a brand that is one dimensional... **When we think about trends, influencers, people as brands or brands as people, what isn't being talked about is how do we create longevity? So, this isn't just gimmicks.**”

NOELLE FAULKNER, CULTURAL WRITER AND STRATEGIST



**BE CONSISTENT
IN YOUR
COMMITMENT**

People are hardwired to see patterns so we can predict what is likely to happen. Inconsistency is a major trigger for uncertainty.

Strong, resilient relationships are ones where people commit to each other – through good times and bad times. Both sides contribute to the relationship, it's not one sided. This is also true for how brands need to act.

Perceived safety is dialled up when a brand is consistent in how they show up and what the brand stands for, with consistent actions to support this. It's a partnership with customers and fans that shows there's a willingness to listen and understand.

The perceived safety drivers that will build within this marketing lever:

- Acceptance of any outcome
- Strong shared beliefs, values, interests

What does this mean for brands?

- As a brand, you can't activate with a flash in the pan, or jump on the latest trend. This is particularly important as more brands become more vocal and lean into political, identity and environmental conversations.
- Brand beliefs, values and interests need to follow through into enduring and consistent actions that add value to the conversation or shared interest area – across all areas of business from internal to external. Being prepared for challenging times, it's about staying true to the belief, value or action.

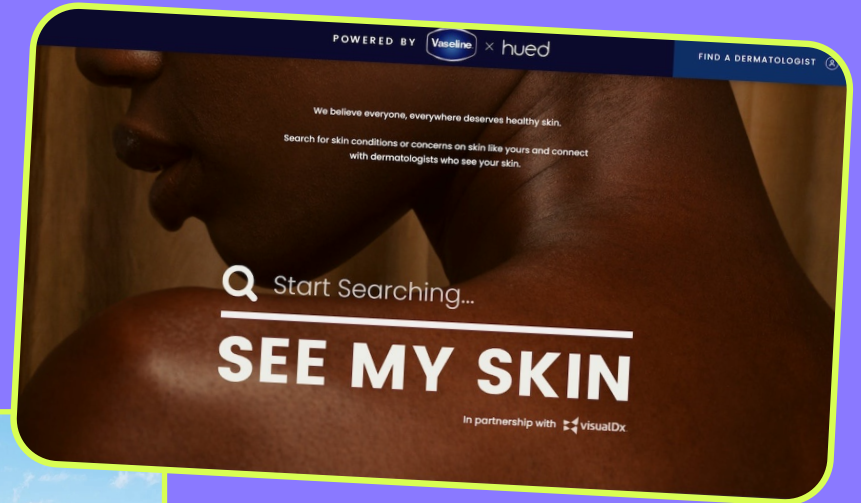
▶ BE CONSISTENT IN YOUR COMMITMENT EXAMPLES FROM BRANDS



Luxury leather brand **Coach**, launched Coachtopia in 2023, a sub-brand whose products are designed and constructed to be circular. Coachtopia is all about community, a collective of designers, thinkers, and consumers who all share a common goal that circularity is the future of fashion. Powered by a 'beta community', the designs are co-created with a global and diverse set of Gen Z voices.



Since its inception, **Patagonia** has stayed true to its core mission and beliefs. From investing in renewable energy, incentivising employees to take greener transport options, campaigning for preserving national parks and helping customers repair their purchases.



To reduce the healthcare bias within skin colour and dermatology, **Vaseline** didn't just feature people of colour in their advertising. They partnered with a digital health care company HUED to create See my skin. A searchable databased of skin conditions for people of colour that connects people with dermatologists.

▶ BE CONSISTENT IN YOUR COMMITMENT

“

“What makes somebody human versus what makes somebody a brand? I think the difference is complexity. I think **if a brand can show humility, if you can show complexity, empathy, self-reflection - those are human qualities that we admire in other people.** They’re qualities that we consider ‘genuine’. Maybe a brand can do that. But it has to show that it understands how to engage in those human ways. **Otherwise it’s just selling.**

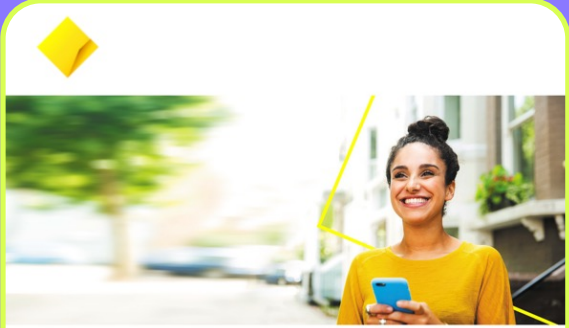
I don’t envy brands that are trying to navigate social media. But I think it needs to be seen through a human lens, rather than a viral lens because that seems to be the mistake that people are making.”

NOELLE FAULKNER, CULTURAL WRITER & STRATEGIST

“

“This stands out to me because this is a very **supportive and caring** update to Comm Bank’s offerings for age groups that are young and are looking at settling their finances and is a good reward while they’re learning.”

MALE, 27, BRISBANE



No monthly account fees while you’re under 30

Hi Sachit,

Good news, monthly account fees on Smart Access and Complete Access Accounts have recently changed.

SHIFT FROM COACH TO COMPANION

Equal the power dynamic.

A trusting and open relationship or context is one where there's an equal feedback loop. It's a symbiotic relationship of equal power dynamics.

Evidence of this over time is what helps people become 'unfiltered' in a context.

The perceived safety drivers that will build within this marketing lever:

- Low power distance and mutual vulnerability
- Acceptance of any outcome
- Equal voice / dialogue / feedback

What does this mean for brands?

- Brands act with good intentions, but often fall into the role of the coach: Full of helpful intentions, supporting and educating customers.
- However, naturally this balance is uneven. The authority falls with the brand (as the expert or knowledge keeper) and it's more of a transactional interaction.
- Taking a companion approach, there's an equal give and take. People can let their walls down and feel like they can be more open to giving and receiving feedback.
- This means opening to collaboration, feedback and acknowledging customers and brand fans, allowing them into the brand's world to help shape it.

▶ SHIFT FROM COACH TO COMPANION **EXAMPLES FROM BRANDS**



Nike's .SWOOSH is a web3-enabled co-creation platform. Framed as a safe and trusted space, it enables Nike Members to learn about, collect and help co-create virtual creations such as shoes or jerseys.

Fashion brand **Telfar** created a pricing model that determines cost based on customer demand. Starting at wholesale price, the items rise in cost to their retail RRP. This ensures the fastest-selling and most popular items are the most affordable. Telfar is putting the power in the hands of customers, letting them determine the cost of the product.

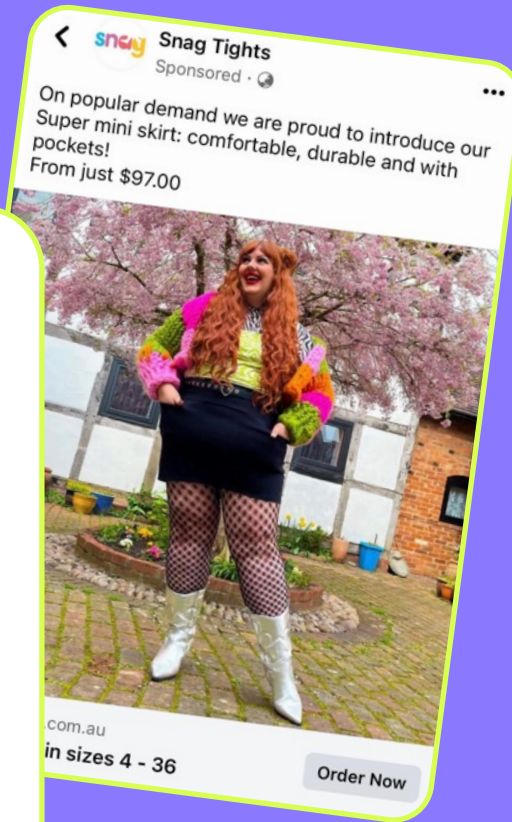


▶ SHIFT FROM COACH TO COMPANION

“

*“As a plus size person for the majority of my life I have struggled with purchasing clothes. There is very few companies that provide plus size clothing that is fashionable and is unforgiving about showing off diverse bodies. They use models that are ALL sizes, shapes, ethnicities, abled and disabled bodies. **Inclusivity in diversity creates community.**”*

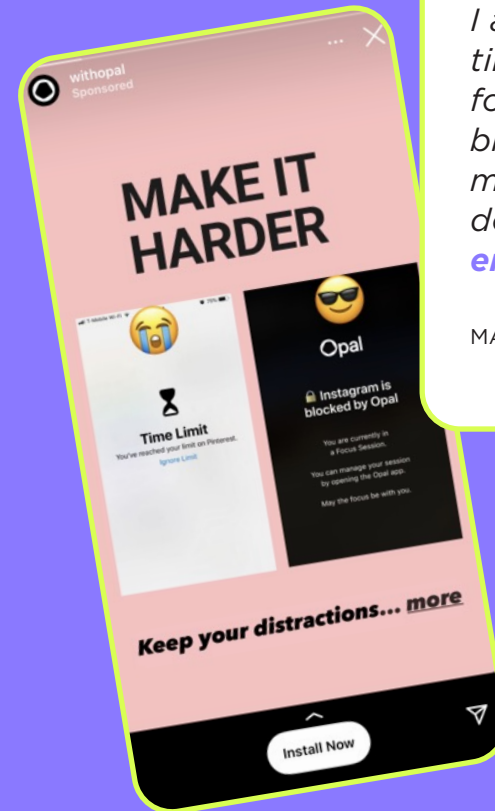
FEMALE, 35, BRISBANE



“

*“This stood out to me as a university student since I am looking to minimize time on social media to focus on my studies. This brand ironically uses social media to convince me to do so with its app, **using emojis in a relatable way.**”*

MALE, 25, MELBOURNE



**PRIORITISE
LESS OVER
MORE**

When we can be confident in our decisions, it builds perceived safety and ease.

When there are too many choices within a decision a couple of things happen.

1. We can experience decision paralysis from too many options being presented, making it difficult to compare.
2. We experience loss aversion, an overwhelming fear of missing out over what has been gained.

Both of these lead to high cognitive load, which triggers slow, over-rationalised and distrustful responses.

The perceived safety drivers that will build within this marketing lever:

- Acceptance of any outcome
- Low cognitive load

What does this mean for brands?

- While additional products and features allow for customisation, there's risk that it is triggering high cognitive load in decision making.
- Support decision making through helpful product descriptions, framing who the product or service is best for, or reduce the number of products/services available.

► PRIORITISE LESS OVER MORE EXAMPLES FROM BRANDS



In a category that is increasingly getting more knowledgeable and sophisticated, choosing what skincare is right for you can be difficult for newbies or people unfamiliar with the nuances of ingredients. **Go-to** has helped to demystify a category with its straight-forward tone and product range *'Uncomplicated Skin Care That Actually Works'*.

Currently **Polestar** has two models on the market, the Polestar 2 and 3. The electric vehicle brand makes it easy for potential customers to evaluate their options, compared to other vehicle brands that can have 8+ models.



THANKS!

TRA

the *growth*
d_stillery