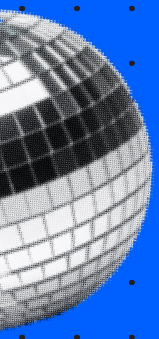
KANTAR

WINNING IN 2026







RITUALS & RESOLUTIONS





Winning in Culture

Volume One

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> Rituals work because they're both human and humane: they're repeatable, flexible, and shaped around real life. Brands that design for these small, but sticky, moments can earn a place in people's lives.

Lou Ellerton,
Client Partner, Kantar Consulting, UK

(HOW) SHOULD BRANDS PLAY **IN CULTURE?**

'Rituals and resolutions are powerful cultural behaviours. This makes them fertile spaces for generating cultural capital'.

As the race for technological innovation delivers ever smaller marginal gains, and the attention economy becomes increasingly saturated, brands no longer compete only through products or campaigns. They now compete in their ability to generate cultural capital.

Culture isn't something brands can simply "tap into." It is fast, fluid, community owned and, often, algorithmically amplified. Brands entering this space must proceed with clear intent and point of view.

Cultural capital is increasingly generated at the edges. It is decentralised: it emerges from creators, fandom collectives, subcultures, online micro scenes, and Discord servers.

To succeed, brands need to co-create with creators and communities and build platforms where cultural expression can thrive. To do this, they must create guardrails that support, rather than limit, participation. The brands that win contribute to culture rather than extract from it.

Though shaped by macro forces, culture now moves faster than any brand team, agency deck, or sign off process. It demands constant listening. It demands cultural R&D - not just campaigns - and experimentation in the wild rather than perfectly polished assets.

Authority comes from credibility signals within scenes. You earn cultural capital not by declaring values but by being invited into spaces you don't control.

Creating cultural capital requires brands to be both timely and timeless. Plugged into the cultural now, adding momentum and shaping conversation. And anchoring in a narrative truth strong enough to withstand trend cycles. Cultural capital sits in the tension between the two.

The winners will be brands that treat culture as a system to invest in:

Contribution > extraction.
If you're not adding value to the environment, you're mining from it.

Embrace decentralisation.
Culture is made by many through systems that enable people to create with you, not for you.

Timely × Timeless.
Anchor in a defensible truth while moving with the cultural now.

Measure cultural vibrancy.
Track your VIBE, invitations from scenes, creator retention, co authored IP, and Meaningful Difference linked to cultural activations.





Mary Lumley
Senior Consultant, Kantar Consulting, UK

RITUALS & RESOLUTIONS: A YEAR OF FIRE, HANDLED WITH CARE

2026 is the Year of the Fire Horse in the Chinese zodiac. Traditionally associated with intensity, momentum, independence, and risk-taking, it is often framed as a period that rewards bold movement over hesitation.

Fire Horse years are also known for volatility - energy that needs direction as much as ignition. This symbolism looms over how 2026 is being culturally imagined.

And yet, the way we observe people around the world entering 2026 suggests something else entirely. Not faster. More measured.

Across TikTok and Instagram, January is now organised around softer, more repeatable rituals. **"Soft January"** reframes the month as recovery rather than self-correction. **"Sunday Reset"** routines turn cleaning, planning and life admin into calming, almost ritualised weekly moments. Interest in **#sundayreset** has **increased by 76% on TikTok vs. 2023**.** Even **"damp January"** reflects the same instinct, moderation over extremes, sustainability over performance.

A new year reset still matters. But dramatic resolutions, strict rules and public declarations feel increasingly out of sync with everyday life. After years of disruption and uncertainty, many have learned that high-pressure change burns out fast. So, the approach to self-improvement has softened. It is shaped by what feels realistic to sustain. Intensity is no longer the goal. Change that fits into daily life is.

In a year symbolised by fire, people are not adding fuel. They're **learning how to control the burn.**



"We're tracking a rebalancing of global cultural influence - ideas are moving more fluidly between East and West. Rising interest in the Chinese zodiac is a clear signal of that shift."

Hari Blanchbennett,
Associate Director, Kantar Consulting, UK



THE **MODERN** RESOLUTION

Replacing resolutions is not indifference. It is intention. Intention to build systems that support real life, rather than sit above it.

This shows up in how resets are broken down. Not one big promise or annual vow, but many small cues. Not "new me", but "set myself up". Attention shifts towards energy, capacity, recovery, and sleep, rather than just outputs. Formats like "dopamine menus" among Gen Z **(+227% searches vs. 2023*)** – visualised personal lists of low-effort joy - function less as rewards and more as tools for regulation.

Public self-improvement has shifted too. "Ins and outs" lists dominate January feeds, not as declarations of success but as cultural shorthand for boundaries. They are playful and social, but also practical. Less ***"watch me completely transform",*** more ***"these are my limits".***

None of this means aspiration has disappeared. Vision boarding's popularity has soared. What has changed is the method. Progress has been reassembled into something more sustainable. Rigid resolutions have been replaced by rituals that can be repeated weekly, adjusted over time, and supported by structure rather than unwavering willpower.

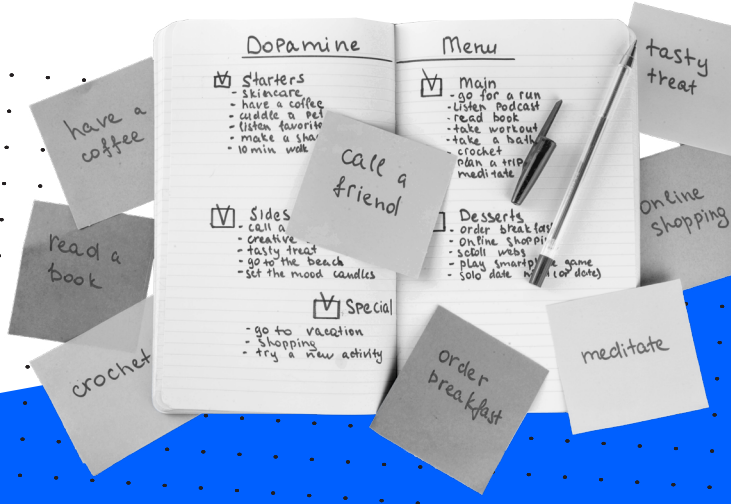


***Google Search data**, UK, 2025 vs. 2023

****TikTok trends**, UK, 2025 vs. 2023

HACK FOR WINNING:

Embrace rituals culture - design experiences, content and products that fit into small, sustainable moments





Lucy O'Brien
Senior Consultant, Kantar Consulting, UK

REDEFINING AMBITION: WHAT PEOPLE ASPIRE TO TODAY

The shift toward softer rituals signals something larger: a quiet redefinition of ambition itself.

Ambition is rising, significantly. But there is another, equal and opposite force at play.

Today, ambition exists in tension with another rising need: **to slow down.**

People are grounding themselves in behaviours that restore control, comfort and a sense of more measured forward motion amid the context of years of global uncertainty, overwhelm and instability.

This has created a duality: while many are easing into softer, steadier habits, others are doubling down on precision, performance and the pursuit of ever greater efficiency.

One response to this is to manage stress and focus on emotional wellbeing through slow living - simplifying life, minimising distractions, finding ways to escape from the routine or, mindfully, live in the present.

Another response is double down on personal achievement: wealth, status, appearance, recognition, self-optimisation.

People aren't just rethinking how they pursue progress; they're rethinking how they mark it. As traditional milestones become delayed, uncertain or harder to reach, new forms of achievement are stepping in to fill the gap. While some people are seeking defining moments of recognition, others are turning toward quieter, longevity focused markers of growth.

— Endurance events – which now act as new milestone achievements – are rapidly rising. 2026 London Marathon entries are **up 36% year on year.** Searches for IRONMAN, Hyrox & ATHX challenges and winter 10K have been **increasing year on year*.**

— At the same time, **demand for social fitness is on the rise*.** Looser, more holistic ideas of progress that prioritise recovery, balance and long-term wellbeing are gaining traction. People are looking to manage stress **(+26%*)** and healthy living. **"Sleepmaxxing" searches grew 2,041% vs. 2023*** with wearables like Oura and Whoop being adopted as long-term health advisors.

This coexistence is increasingly visible in how people approach sport, movement and fitness. In response, brands are beginning to adapt, expanding their definition of performance to include physical, mental and emotional dimensions.

The paradox - ease and aspiration, pace and progress - is reshaping what people value and how they define success, creating a new landscape of aspiration brands need to understand.



> A 'good night's sleep' is no longer enough. A steady rise in searches around 'REM sleep', 'bedtime hygiene', and 'deep sleep' reveals a need to optimise overall sleep quality, reflecting broader interest in longevity and holistic wellness.

Kira Kolosova,
Senior Digital Strategy Manager, Kantar Analytics



***Google Search data,** UK 2025 vs. 2024 and 2023

This is why rituals are winning over resolutions: they offer momentum without overcommitment and consistency without punishment.



+10%

82%

say taking time to **slow down** and relax is very important

+4%

71%

say they're looking for ways to **simplify their life**

+10%

52%

say it is **extremely/very important to achieve success** or something important in life

+10%

79%

say it is very important to **manage their stress levels**

Kantar Global MONITOR UK, 2025 vs. 2023



HACK FOR WINNING:
Manage the duality in storytelling – decide whether you are leaning into self-optimisation, slow living or a balance of the two?



Emily Muncey
Senior Consultant, Kantar Consulting, UK

Given the importance of effectively connecting to culture, brands need to be conscious of this paradoxical duality of slow living vs. self-optimisation. People are finding ways to balance the two and adopting new ways to mark progress. This has implications for what brands communicate to create common ground and where and how they show up to meet people where they are.

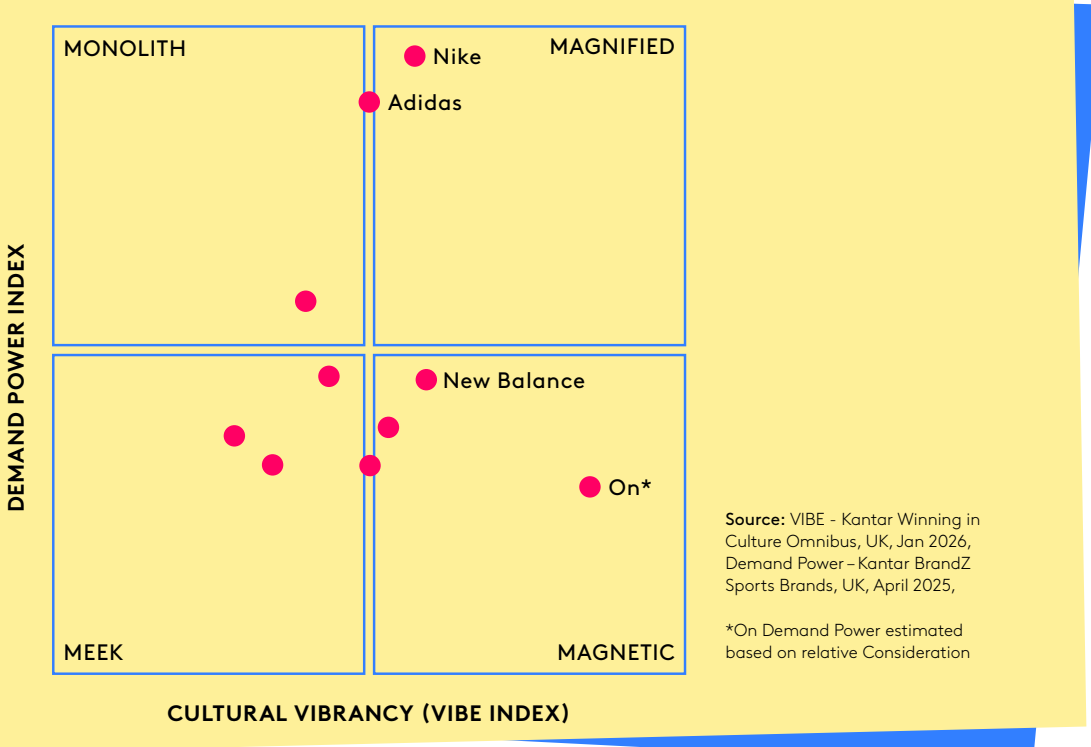
We've shone a spotlight on two categories: sports apparel and sports wearables. Our mission: to understand how effectively brands have been engaging in culture, what the winning strategies have been and whether we could see responses to these cultural shifts coming through in their activation.

THE NEW ORDER IN SPORTSWEAR

Nike and Adidas are still clear front-runners of the sportswear pack. They have strong predisposition and pricing power. And people will probably think of them first when they have a sportswear need. But while they remain market leaders, their dominance has softened; and new and rejuvenated brands are achieving explosive double-digit growth, stealing share from below. Kantar VIBE analysis shows that one of the ways these brands are winning is through effective connection to culture.

We plotted brands based on their cultural vibrancy, using Kantar's VIBE metric – how visionary, inspiring, bold and exciting these brands are; and their Demand Power - their ability to drive predisposition and preference. This enables us to identify brands using culture to magnify equity vs. those with an opportunity to drive growth by dialing up cultural vibrancy. On and New Balance are amplifying their equity via effective cultural connection, putting pressure on Nike and Adidas.





Source: VIBE - Kantar Winning in Culture Omnibus, UK, Jan 2026, Demand Power – Kantar BrandZ Sports Brands, UK, April 2025,

*On Demand Power estimated based on relative Consideration

HOW HAVE THESE SPORTS BRANDS BEEN **DRIVING CULTURAL VIBRANCY?**

CASE STUDY: **On**

#1 VIBE Index 135 | #1 Visionary | #1 Inspiring | #1 Bold | #1 Exciting



Born from a retired athlete's obsession with engineering, On set out to build the most high-performance shoe possible - cushioned landings, powerful take-offs, clouds underfoot. Only one in three in the UK know it, but it's an IYKYK brand in hypergrowth. Searches for **"On Cloud trainers" were up 265% in 2025 vs. 2022*.** They stand apart from other brands in the sheer number of places where people encounter them. Athlete partnerships are about co-creation, not just endorsement. They doubled down on the need to achieve by co-designing marathon winning shoes with New York marathon winner Hellen Obiri and have just signed rising football star Sydney Schertenleib. Cultural activations span tech and taste: their flagship store that feels like a shoppable science museum; and collabs with Loewe and culture makers like Zendaya, FKA twigs, Burna Boy have driven fashion virality.

CASE STUDY: **New Balance**

#2 VIBE Index 109 | #2 Visionary | #2 Inspiring | #5 Bold | #2 Exciting

New Balance has driven cultural relevance by meeting consumers where they want to be. They have blended fashion credibility with performance culture. Reimagining classic silhouettes and leaning into the **"Dad shoe"** aesthetic have driven major search interest for models like the 9060, 1906R and most recently the 740.

Collaborations with Aimé Leon Dore, Miu Miu and artists like Rosalía and Aminé have amplified style relevance. At the same time, New York and London marathon sponsorships, athlete partnerships and local grassroots running communities have deepened performance credentials. This dual strategy has boosted pride in wearing the brand, and aligned with people's aspirations to progress.



CASE STUDY: **Nike**

VIBE Index 107 | #4 Visionary | #3 Inspiring | #2 Bold | #3 Exciting

Nike remains the bold, influential, **"cool one"** in sportswear, according to Kantar Omnibus results. The brand of winners, big athletes and big statements. Its strongest cultural moments have been rooted in brand DNA: empowerment and **"Just do it"** mindset. Iconic work that shaped culture like the Colin Kaepernick and Serena Williams campaigns still anchor brand memories.

Nike continues to reinforce this through its championing of female athletes: Super Bowl work like So Win, the community driven Nike After Dark series, high-profile support of the England Lionesses, and creator partnerships such as runner Mary McCarthy. Their Mind Science Department is also innovating around what matters, with Nike Mind 001 and 002 designed to boost focus, calm, mental readiness and recovery - keeping Nike connected to cultural momentum around more holistic progress goals, supercharging demand*.





CASE STUDY: **Adidas**

VIBE Index 100 | #3 Visionary | #5 Inspiring | #7 Bold | #4 Exciting

HACK FOR WINNING:
Be timely x timeless. Double down on your brand's core identity, stay true it. AND energise and shape to culture by working in tune with it.



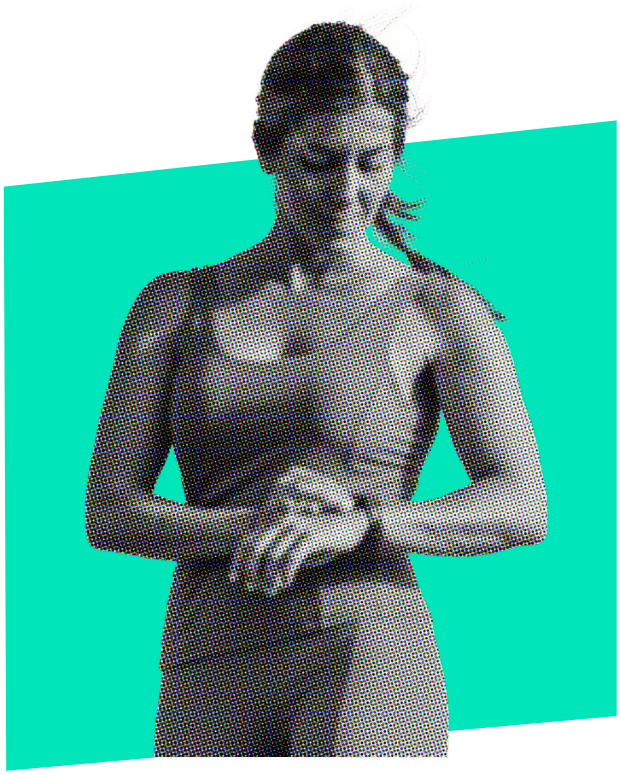
Aligning authentically with cultural moments that elevate brand DNA has helped Adidas cement its creativity, fashion-forwardness and mission to change lives through sport. Their 2025 Oasis collaboration was a masterclass in authentic partnership, turning Britpop heritage into renewed relevance, fuelling buzz and demand*. And their Originals campaign, Clocks, narrated by Samuel L. Jackson and featuring Missy Elliott, was equally iconic.

But where they have leaned into the balance between ambition and sustainable rituals is their 2026 partnership with Molly Mae and communicating the shift towards **"everyday performance, mindset and movement".** Showing up daily, rather than extreme fitness. Busy, but human. And gaining access into her huge young following in the process. With 10.2M TikTok followers, the highest among the major sports brands, Adidas shows real cultural fluency with Gen Z and Gen Alpha.

***Google Search data,** UK 2025 vs. 2024

THE WEARABLES AND TECH **REVOLUTION**

As people shift from relying on sheer willpower to building sustainable systems around them, many are increasingly turning to technology - especially AI - to help streamline and support everyday life.



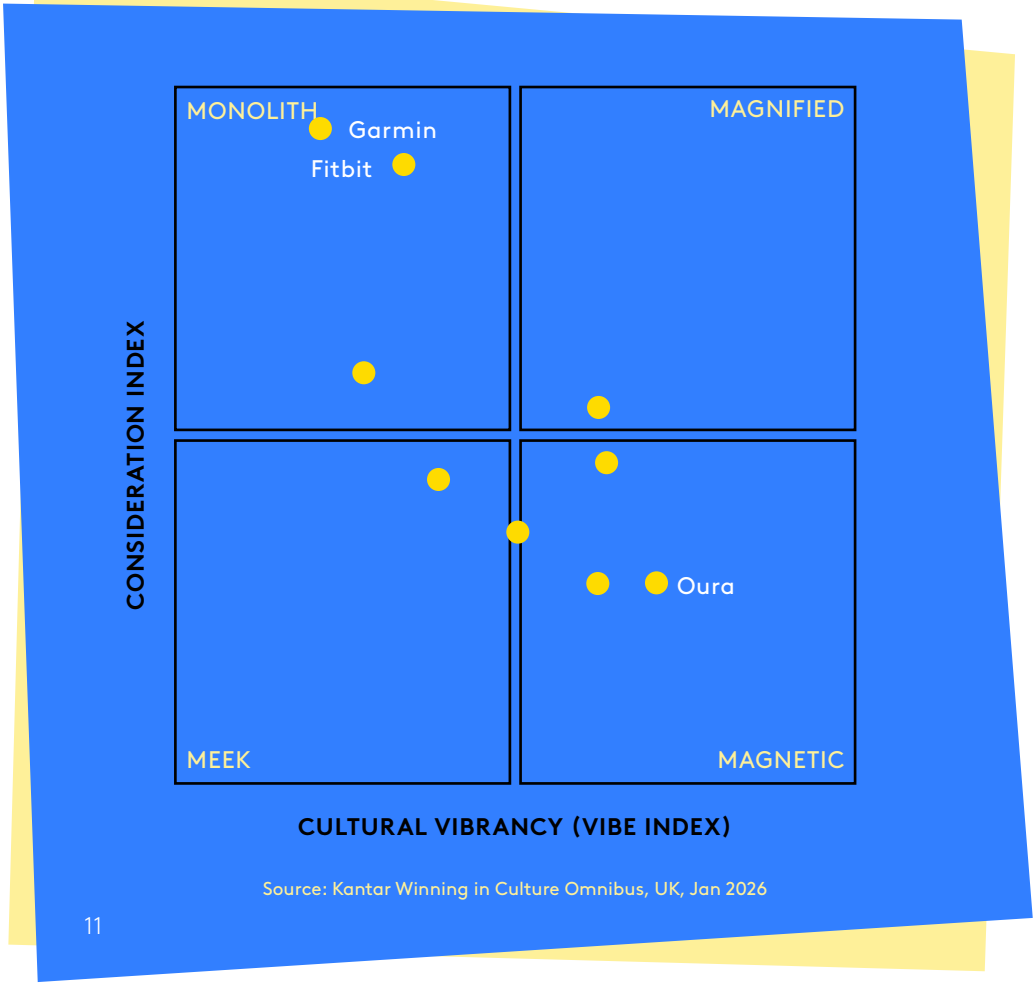
+10%

55% say it is very important to **have the tools to monitor my own health** on a regular basis

+16%

48% say **having products and services that can anticipate my needs** is extremely/ very important

Kantar Global MONITOR, UK, 2025, vs. 2023



Source: Kantar Winning in Culture Omnibus, UK, Jan 2026

We've plotted brands according to how culturally vibrant they are (using Kantar VIBE) and how considered they are - the extent people are willing to think about and shortlist brands when making a purchase decision. This view allows us to identify brands using culture to magnify equity vs. those with opportunity to drive growth by dialing up cultural vibrancy. Oura is leading on VIBE, but doesn't yet have mass appeal, whilst Garmin and Fitbit have the highest consideration, but aren't winning on cultural vibrancy.

CASE STUDY: **Garmin vs. Fitbit**

Garmin - VIBE Index 72 | #1 Consideration | Fitbit - VIBE Index 85 | #2 Consideration

Garmin has become cultural shorthand for commitment, while Fitbit represents accessible wellbeing rather than elite performance. Together, they embody the two dominant health archetypes: performance culture (Garmin) and everyday wellness culture (Fitbit), yet both remain Monoliths - high consideration, low cultural resonance.

Fitbit built early cultural capital by turning movement into a communal game: steps competitions, badges, friend groups and shared challenges made health a social ritual. Garmin signals something different: you're not just tracking steps, you're training. It brings discipline, structure and self-imposed progression. Quantification becomes identity.

To strengthen cultural VIBE, each could lean into its distinct power. Garmin could lean into intensity and training culture, while Fitbit could amplify democratisation and social motivation.



Garmin vs. Fitbit: Cultural Summary

Cultural Territory	Mastery, discipline, endurance	Approachability, belonging, balance, encouragement
Rituals	**Structured training plans:** performance analytics, outdoor exploration, incremental gains	**Accessible wellbeing:** Step goals, sleep tracking, gentle daily routines, small wins that fit into life
Community Type	**Serious athletes and adventurers.** Competitive, performancedriven, goaloriented; bonded through challenge and achievement.	**Everyday wellness seekers.** Inclusive, social, supportive; bonded through participation and shared everyday progress.

CASE STUDY: **Oura Ring**

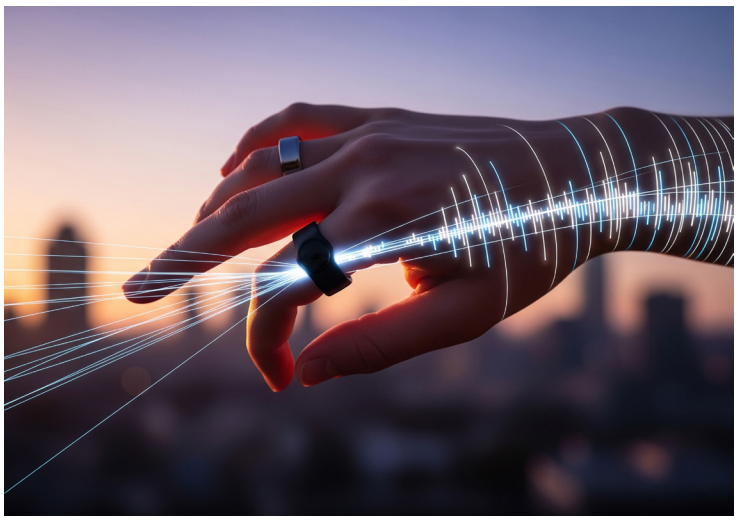
VIBE Index 121 | #1 Visionary | #3 Inspiring | #1 Bold | #1 Exciting



Early adoption of the Oura Ring was driven by male tech enthusiasts focused on tracking metrics and Huberman-style self-optimisation. Then, spotting a gap, Oura shifted to women's health and sales soared. What began as a discreet sleep tracker became a visible status symbol, with subtle endorsements from Elon Musk, Prince Harry and athletes giving it credibility across tech, fashion and performance.

The 2022 Gucci partnership cemented it as both health tool and premium style item. Tracking and publishing biometrics is now cultural signalling - **#biohacking & #longevity** has been trending upward on **TikTok since 2023*.** Oura leans heavily into the narrative of daily, long-term wellness rather than one-time metrics, creating rhythms and systems that favour sustainable habit stacking. Personalised, AI-generated insights and advice reflect demand for personalised guidance and motivational nudges. Interest has exploded, with **31% YOY growth vs. 2024**.**

HACK FOR WINNING:
Growth comes from cultural momentum - connecting to emerging behaviours, identities, rituals and communities, not relying on heritage or product strength alone.



*** TikTok data from TikTok,** last 3 years, Global & UK

****Google Search data,** UK 2025 vs. 2024

ENDNOTES:
CREATING CULTURAL CAPITAL

People don't exist in isolation. They are shaped by the cultural world around them. Culture is everywhere. It's what we talk about, how we dress, where we go, what we do, what we eat.

Culture influences what we value, our attitudes and our aspirations. It influences the decisions we make, without us being aware of it.

Culture is the connective tissue that holds us all together. It creates a critical mechanism for brands to connect to audiences. Culture provides shared language and common ground that enables brands to have meaningful conversations with the people they serve about the things they care about.

To show up effectively - and authentically - brands need a point of view on culture: a way to navigate it, decide what to lean into, and where they have the right to show up.

When brands connect effectively with culture, they grow.

Brands span the continuum from culturally tonedeaf to culturally vibrant - from those that miss the moment, to those chasing the moment, to those who energise and shape it. Kantar BrandZ data shows that

Brands with high cultural vibrancy grow nearly 6x faster than those with low cultural vibrancy.

This works because cultural vibrancy is a powerful way to build Meaningful Difference; and Meaningful Difference is a proven route to growth. Effective cultural connection can activate all growth levers. It can spark salience and buzz, increase presence at key buying moments, and give brands legitimacy in new spaces or with new audiences.

Culturally vibrant brands amplify Meaningful Difference by being more Visionary, Inspiring, Bold and Exciting.

Culturally vibrant brands amplify Meaningful Difference by being more:

V

VISIONARY

They lead in a way that transcends the category and gets attention

I

INSPIRING

People want to engage with them and be associated with them

B

BOLD

They have unmistakeable identity and influence

E

EXCITING

They shake things up and create momentum

ENDNOTES:
CREATING CULTURAL CAPITAL

Brands unlock culture's power as a catalyst for growth when they connect in ways that feel authentic to brand and context, resonate deeply with audiences and set them apart from the competition.

Brand hacks for winning in culture:

Understand your start point.
Measuring cultural impact can be challenging. Kantar's VIBE framework reveals relative cultural vibrancy, an essential complement to equity measurement.

Solidify your foundations.
Anchor your approach to culture in growth strategy, sharp brand positioning and deep audience understanding. Kantar frameworks leverage AI and Kantar IP to create clarity.

Invest in cultural intelligence and cultural strategy.
Culture is vast. Build cultural fluency and find the enduring constants your brand can springboard from long-term. Kantar's cultural consultants have access to on-the-ground cultural correspondents, Kantar's Streetscaper networks, and Kantar Global MONITOR trends tracking balancing local nuance with robust contextualisation.

Reinforce consistently
Build brand memories - ensure every interaction is unmistakably yours. Complement creative evaluation with NeedScope AI and expert decoding to ensure consistent emotive tone of voice.



Lindsay Gorton-Lee
Strategic Solutions Lead, Kantar Consulting, UK

DISCOVER

Culture moves fast. Brands that don't move with it get left behind.

Today's most successful brands don't just reflect culture—they shape it. But staying relevant in a world of shifting values, emerging voices, and evolving expectations is no small task.

That's where Kantar comes in.
We help you build brands in culture.

We help you unpack the cultural forces shaping your category, your consumers, and your future. From social movements to media narratives, we identify the signals that matter, understanding brands and culture and showing you how to act on them.

Whether you're a legacy brand defining your cultural strategy or a new brand challenging the status quo, we can help find routes to build Meaningful Difference.



Please reach out if you'd like to find out more:

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