Brand Insights

by Essence Branding

essence
MARCAS COM ALMA

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2026

Editorial Director's Letter

Building a consumer behavior observatory doesn't begin with the choice of tools, it starts with an earlier decision: to observe and to listen. Two words that appear repeatedly throughout this edition, and not by chance.

Brand Insights 2026 is the result of a full year of deliberate attention. It was born from the accumulation of conversations, silences, actions, and contradictions. From a gaze that returns to the same place and finally sees what was once invisible. From our commitment to a state of presence: not only before data, but before people and life as it unfolds.

It's also an opportunity to look inward. After all, before being strategists or consultants, we are all consumers. Observing others, in that sense, is also an act of self-knowledge.

What you'll find here is not an inventory of ready-made solutions to replicate, but a curation of ongoing movements.

From here on, we count on you to bridge these observations to your own reality, translating them coherently into your brand's essence, context, and strategy.

With care,

Letícia Lutbel

Partner & Head of Strategy, Essence Branding

Founder's Letter

It is with immense pride that we launch Brand Insights for the fourth consecutive year.

More than a report, it has become a space for reflection, an invitation to see human behavior and the role of brands with greater depth, sensitivity, and strategy.

Year after year, our intention remains the same: to transform perspectives and broaden horizons.

In a world in constant motion, we believe that understanding what moves people is the first step toward building brands that move the world.

This report is born from the collective vision of the Essence Branding team, a consultancy that combines research, strategy, and purpose to help companies reveal what is most authentic within them.

Everything you will read here is the result of attentive listening, genuine curiosity, and a deep commitment to the evolution of our market.

May each page awaken new questions, new reflections, and new possibilities to act with more soul, coherence, and consciousness.

With care,

Maria Brasil

Founder, Essence Branding

How to experience your Brand Insights 2026

A material created to deeply observe consumer behavior must, by principle, consider how most of us consume content today. That was the inspiration behind developing a version that speaks directly to this experience.

The design adapts to mobile use and makes efficient use of desktop screens, ensuring a smooth reading experience on any device.

How to read Brand Insights 2026:

On mobile: rotate your screen to landscape mode for a more comfortable reading experience.

On desktop: maximize your window to take full advantage of your screen's width.

This format was chosen to offer an ergonomic and contemporary experience that aligns with the real way people navigate.

Consumers are being moved by...

01 The intolerance to friction

02 The math of small pleasures

03 The silences that speak

04 The ambivalence between the physical and the digital

05 Those who move culture

01

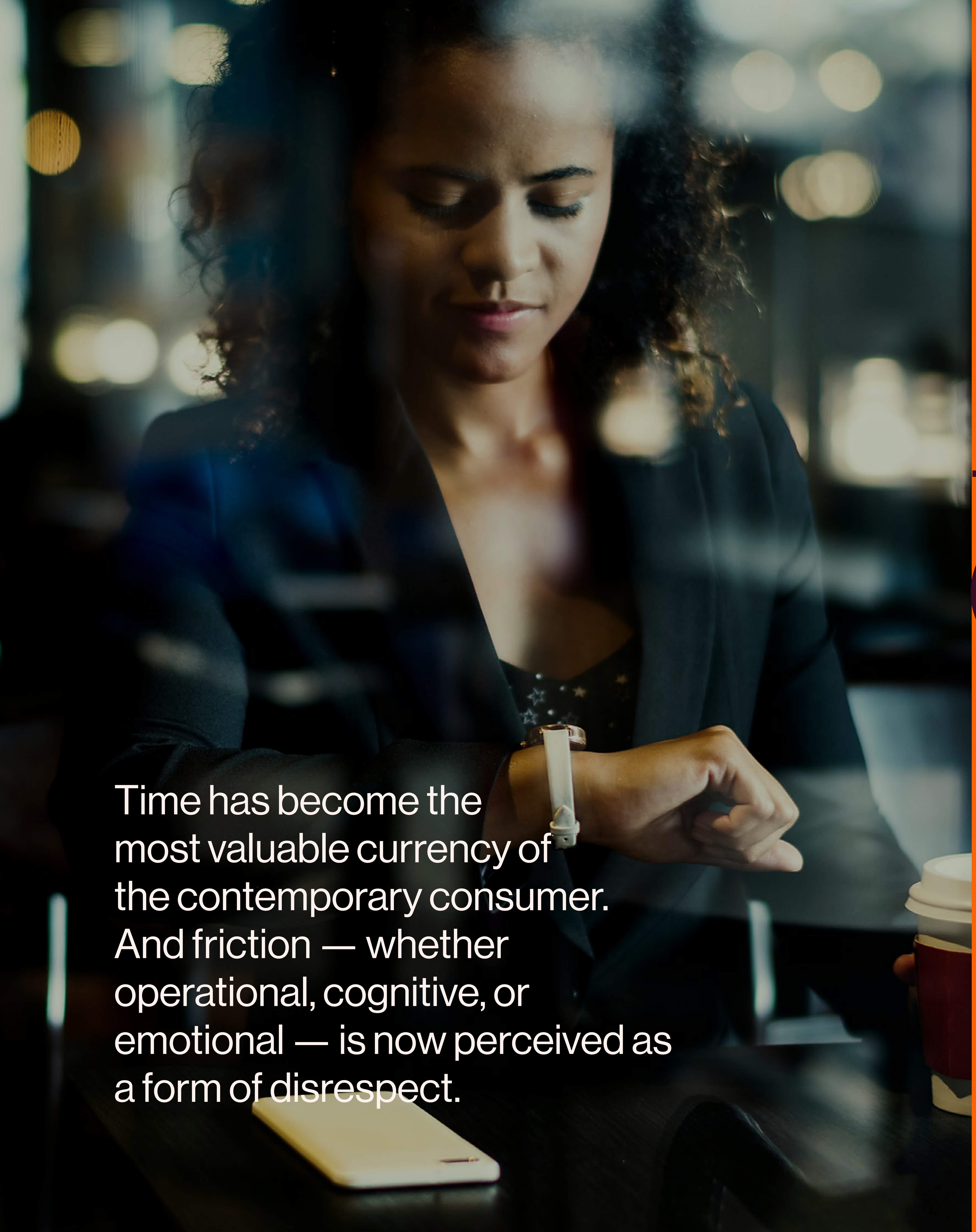
Consumers are being moved by the intolerance to friction.

to reflect

When was the last time you waited without complaining?
When you tolerated a line, a confusing website,
or a robotic service interaction?

Think about it: what do you do when something in your consumer journey doesn't flow? You abandon it. You complain. You look for another option... and you certainly do that much faster than you did five years ago.

Now look at your brand, the company you lead, the organization you work for, or even your personal brand: **is it asking your customer for patience, or offering a fluid experience?**



Time has become the most valuable currency of the contemporary consumer. And friction — whether operational, cognitive, or emotional — is now perceived as a form of disrespect.

The consumer is not just impatient:

they are exhausted by

complexity

Trained by increasingly seamless experiences in some sectors and still deeply frustrated in others, they've developed a new reflex: when faced with any obstacle, they simply move on. No warning, no goodbye.

This intolerance isn't a whim, it's a learned behavior. Years of convenience have shaped a new standard of expectation.

The consumer has consolidated what we might call a **bring-it-to-me mindset: the expectation that everything — products, services, information — should come to them.**

Food delivery, for example, jumped from 9% of global spending in 2019 to 21% in 2024.

More than a habit, this figure reflects a lasting shift in behavior. For many experiences, speed and efficiency are no longer competitive advantages, but basic requirements.[1]

Euromonitor[2] defines this pursuit of simplicity as Filtered Focus: the growing desire for usability and transparency. Clear labels, intuitive journeys, direct communication. **The fluidity consumers expect is, in fact, a combination of clarity, intelligent design, and respect for their time.**

[1] McKinsey. State of The Consumer 2025.
[2] Euromonitor. Principais Tendências Globais de Consumo para 2026.

When brands fail at this, the reaction is silent yet decisive.

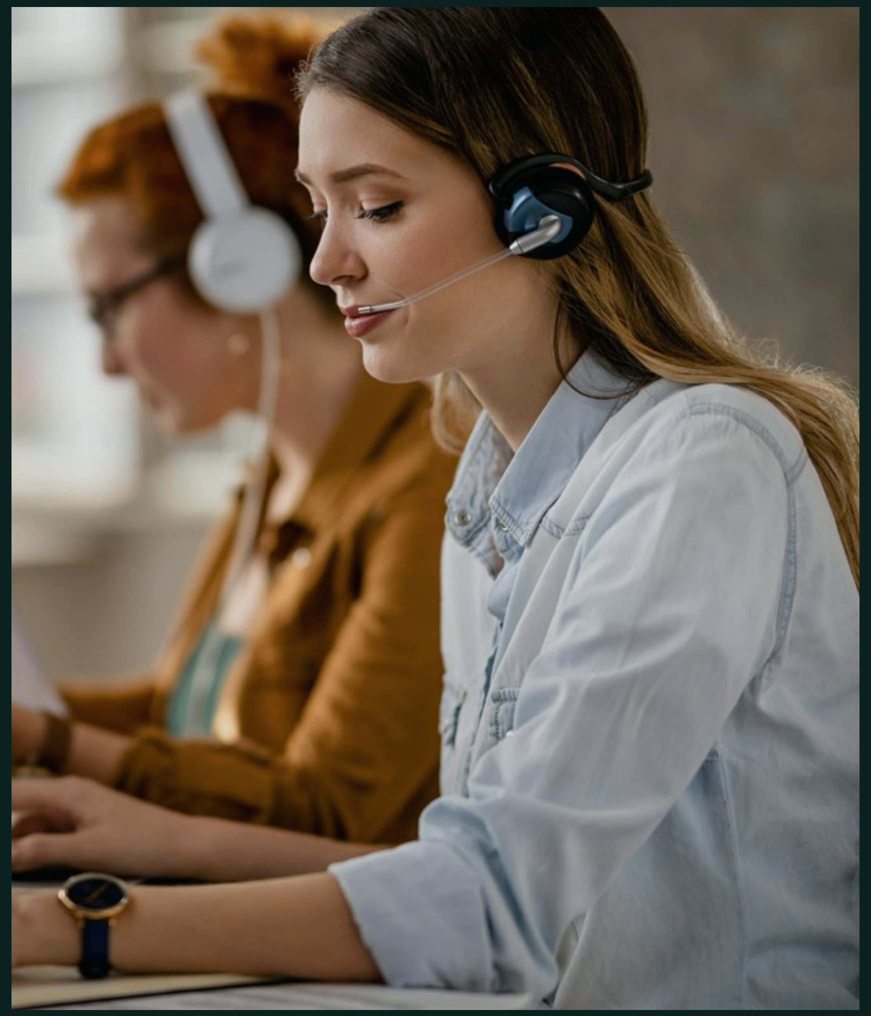
“Loyalty is harder won and more easily lost”

Qualtrics

And the most challenging part:

The consumer doesn't announce their departure. **They simply leave — or worse, carry their frustration forward, turning dissatisfaction into narrative in conversations on and offline.**

This also reveals an interesting contrast between industries. Nice-to-have sectors (such as hospitality, fast food, and retail) experience an almost immediate financial impact from poor experiences and therefore invest more in *Customer Experience*, reporting only 9% of negative interactions.



Meanwhile, *need-to-have* sectors (like banking, internet, and energy providers) still present around 14% of negative experiences, a reflection of a time when they could afford not to prioritize experience.[3]

[3] Qualtrics. 2025 Consumer Trends Report.

That time, however, is over. The most attentive brands are redefining the standard, and not even essential services are immune to the pressure for fluidity.

fluidity

In Brazil, this equation gains new nuances. The Brazilian consumer is hybrid by nature: they research online but often complete their purchases in person. They value touch, eye contact, and human interaction. That's why channel fluidity is more than convenience, it's trust.[4]

Amid this scenario, one question remains: **How can friction be eliminated strategically, not just operationally? And how can fluidity become a brand position?**

[4] BCG. Sentimento do Consumidor Brasil 2025.

Applicable insights for brands:

1. Master the basics before innovating
Before pursuing the "next big step" make sure the essentials work flawlessly. Punctuality, usability, and operational empathy are the new foundations of trust.

2. Turn clarity into brand value
To simplify is to communicate respect. Legible labels, smooth navigation, and transparency about timelines and policies are not just signs of efficiency, they are expressions of care.

3. Automate without dehumanizing
The kind of fluidity that matters is the one that solves without distancing. Technology and human listening can coexist. It's worth reflecting: does your automation amplify your brand's humanity or replace it?

4. Treat every touchpoint as an opportunity to build loyalty
Every interaction is a chance to reduce effort and increase affection. Trust is born from predictability and grows through ease. Fluid brands are perceived as brands that care.

to inspire

Amazon Go is an initiative that perfectly exemplifies the elimination of friction in the consumer journey. It operates without cashiers or lines: the customer enters the store using an app, picks up the products they want, and simply walks out. Sensors, cameras, and artificial intelligence automatically detect what has been taken from the shelves and charge the customer's card directly — no checkout required.

This model removes several common bottlenecks such as waiting in line, payment confusion, and prolonged interactions, transforming the act of shopping into a fast, simple, and fluid experience. Amazon Go demonstrates how technology can be used to reduce operational and cognitive barriers, respect the consumer's time, and make the journey more natural and efficient.

Even without working for a large tech company, professionals and brands can draw inspiration from this case to rethink every customer touchpoint and eliminate unnecessary effort and friction. Simple solutions, attention to detail, and a mindset oriented toward fluidity make a significant difference in consumer perception — and can be applied to any sector or scale — showing that innovation is possible when strategy is rooted in customer focus.

02

Consumers are being moved by the math of small pleasures.

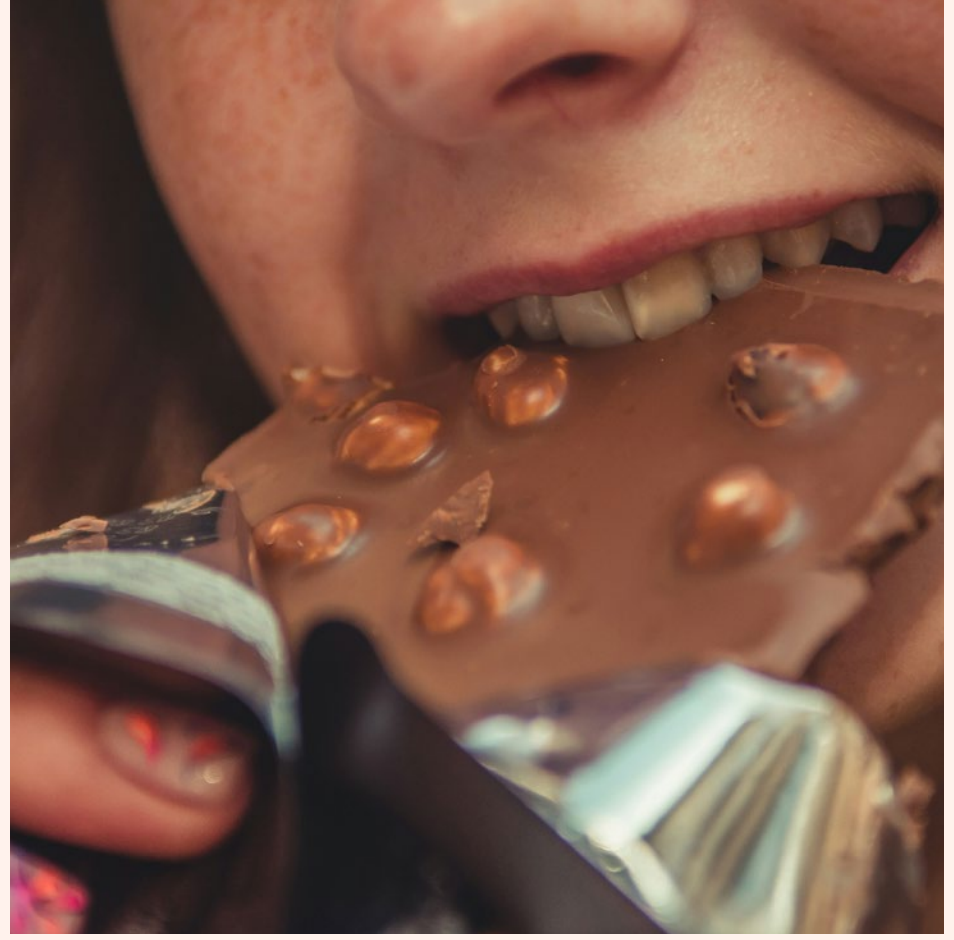
When was the last time you treated yourself to a small indulgence? A special coffee, a scented candle, a chocolate you didn't need but wanted anyway? Was it impulse or intention? Lack of control or self-care?

The consumer isn't necessarily spending less, they're spending better. Cutting excess, yet making room for pleasure. Recalculating priorities, but not giving up on small joys. And doing so with increasing awareness — almost mathematically.

Now, as a professional, it's worth asking: **what place does your product or experience occupy in the emotional and financial life of those who choose it?**

In a context where rising prices are the main concern for global consumers — ahead of issues like climate change, international conflicts, and unemployment[5] — one might expect a contraction.

[5] McKinsey. State of The Consumer 2025.



But consumption hasn't necessarily shrunk;
it has reorganized itself.

Pleasure hasn't disappeared, it's been redistributed.

What emerges is what we can call *the math of small pleasures*:

A mindset in which spending becomes more strategic, conscious, and emotional. Brands that understand this equation know it's not about pushing consumption, but about understanding the space they occupy in people's financial and emotional lives.

Under economic pressure, *trading down* behaviors are on the rise. Consumers optimize each expense, seek deals continuously (not just during seasonal sales), and make selective trade-offs between categories. **Yet, they still maintain their planned indulgences. These small pleasures are no longer impulsive; they are deliberate decisions.**[6]

[6] Qualtrics. 2025 Consumer Trends Report.

value

In other words, people are reevaluating what is worth paying for.

Price remains decisive, but the consumer's gaze is expanding: it's not just about *how much it costs, but how much it's worth.*

Perceived value gains weight: it doesn't replace price, but now shares the center of the decision-making process. Conscious consumption is no longer about saving, it's about maturity: **spending intentionally, as a gesture of control and well-being.**[7]

But there's an emotional layer to this math that numbers alone can't explain. WGSN identifies for 2026 the rise of *The Hopefuls*[8] — people who, in response to burnout and the culture of speed, are seeking a gentler, more communal, and emotionally sustainable life. In other words, people are redefining what's worth investing in — both emotionally and financially. **They celebrate micro-moments of joy, everyday pleasures, and attainable well-being,** understanding that when chosen with intention, pleasure itself becomes an act of economic self-care.

[7] Euromonitor. Principais Tendências Globais de Consumo para 2026.
[8] WGSN. Future consumer 2026.

pleasure

By 2027, this trend evolves into the concept of *Strategic Joy*[9]. **After years of overload, pleasure is being reinterpreted as creative force and vital energy.** Lightness is no longer an escape, it becomes part of the equation: **a planned investment, both for the soul and for the wallet.**

In Brazil, this movement takes on its own unique contours. **We observe a paradox typical of the Brazilian mindset: pessimism about the country, yet optimism about one's own life.** The result is a pragmatic and adaptable consumer, aware of challenges but focused on what can be controlled. They research, compare, and prioritize cost-benefit, functionality, and durability. They switch brands easily, yet remain loyal to those that deliver true value.[10]

[9]WGSN. Future consumer 2027.
[10]BCG. Sentimento do Consumidor Brasil 2025.

And even while saving, Brazilians make room for pleasure. "They save first, prioritize essentials, and then allow themselves small pleasures," highlights BCG.

These small pleasures are not tied to income or status, but to a universal desire for relief and contentment. **Each person finds their own possible indulgence:** a special coffee, affordable self-care, or a well-deserved rest. The math changes depending on the budget, but the logic remains: **pleasure as a strategy for emotional survival.**

Given this, **the question for brands is less about selling pleasure and more about *understanding* their place in this new equation** and acting with sensitivity to be where consumers truly want them to be.

Applicable insights for brands:

1. Recognize pleasure as a necessity, not a luxury
Pleasure is no longer an escape, it has become a form of emotional balance. People aren't cutting out joy; they're recalibrating where to invest in it. Brands that understand this can position themselves not as luxuries, but as possible and well-deserved indulgences.

2. Offer meaning, not just stimulation
Consumers are saturated with messages and offers. What they now seek are experiences that make sense, that fit within their lives, their time, and their budget.

3. Respect the time and rhythm of those who consume
Not every pleasure is instant. Some are planned, ritualistic, and earned. Brands that recognize this pace can create spaces for conscious pleasure — what people *allow themselves*, not what they later regret.

4. Be a host, not just a seller
To be a brand is also to be a host. It's about creating spaces of care, belonging, and pause. It's not about pushing consumption, but about understanding the emotional role the brand plays in people's lives.

5. Celebrate the small joys of everyday life
Small pleasures are universal and adaptable. Brands that acknowledge and celebrate them become part of the consumer's emotional routine.

6. Understand that pleasure today is strategic, not impulsive
Brazilian consumers save, prioritize, and only then allow themselves to indulge. Brands that support this equation with transparency, clarity, and intention become conscious choices, not momentary temptations.

to inspire

For **Cacau Show**, pleasure is democratic. The Brazilian brand built its strength by transforming chocolate — a universal symbol of affection — into an everyday, accessible gesture. In a country where budgets are tight and life moves fast, a single bonbon can become the pause between duty and reward. A small luxury within reach, wrapped in familiarity.

At the opposite end of the spectrum, **Le Chocolat Maxime Frédéric à Louis Vuitton** represents pleasure elevated to the category of art. Created by award-winning pastry chef *Maxime Frédéric* in partnership with the renowned luxury house *Louis Vuitton,* the collection blends haute pâtisserie savoir-faire with the Maison's aesthetic heritage, turning chocolate into a ritual of rare, intentional, and symbolic contemplation.

Each, in its own way, reveals the same principle: pleasure is a universal language, but context defines its tone. While **Cacau Show** celebrates *accessible indulgence*, **Louis Vuitton** embodies *aspirational indulgence*.

03

Consumers are being moved by the silences that speak.

to reflect

When was the last time you answered that customer satisfaction survey in your inbox? Or filled out an NPS form after a purchase? You probably don't remember. Or if you do… it's because you ignored it.

Now think: how many times have you walked away from a brand without saying a word? Stopped buying, stopped returning, stopped recommending — and simply moved on, in silence.

Consumers aren't speaking less because they have nothing to say. They're speaking less because they no longer believe they'll be heard.

So the question is: **your brand prepared to listen to what's not being said?**

“Feedback reaches a new low: consumers are increasingly staying silent about their experiences.”

Qualtrics

Explicit feedback is in decline. Satisfaction surveys, suggestion boxes, post-purchase forms — all are being ignored more than ever. **But consumers aren’t any less critical. They’ve simply stopped believing their feedback makes a difference.**

When they stop responding, they don’t stop *feeling*. They act. They abandon, switch, or share their frustration elsewhere. In this context, silence isn’t absence, it’s a response. And perhaps the hardest one to interpret.

But why has this silence settled in?

Three movements help explain it:

01. Saturation of feedback requests

02. Distrust in outcomes

03. Search for privacy and control

01

feedback

Saturation of feedback requests

People are constantly asked to complete surveys after every purchase and interaction. The repetition — especially of identical formats — leads to fatigue and disinterest.

02

distrust

Distrust in outcomes

Many consumers feel that their opinions don't generate visible change.

03

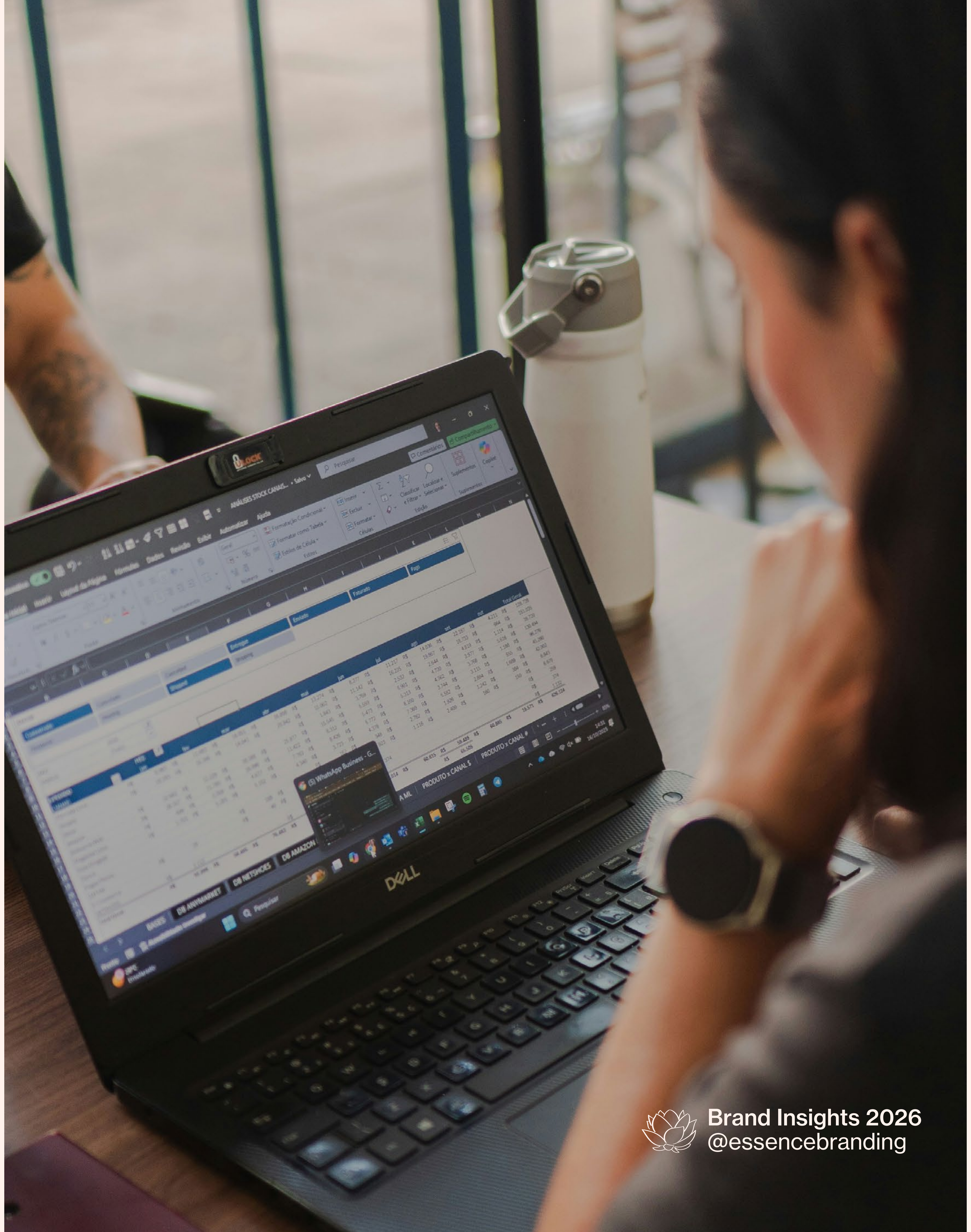
Search for privacy and control

Silence becomes a way to protect themselves from excessive data use and invasive automation.

privacy

In this scenario, organizations that rely solely on metrics like NPS become detached from what truly drives decisions.

The new challenge is to build integrated views of the consumer, combining behavioral data, social listening, and contextual interpretation.



Learning to listen when no one is speaking has become the new competitive edge.

And that goes beyond technology: it requires reclaiming the *human senses* of listening and observation.

It means recognizing that behind data lie emotions. That silence carries intention. And that not every absence signals disinterest: sometimes, it's simply a different kind of request for attention.

In the end, it's less about measuring satisfaction and more about understanding presence, behavior, and emotion: all that the consumer communicates, even in silence.

Applicable insights for brands:

1. Broaden and diversify your listening
There are many ways to hear the consumer. Combine multiple methods and perspectives — such as in-depth interviews, focus groups, navigation analysis, and engagement pattern tracking — and value the spontaneous feedback that emerges from social media (social listening) and direct interactions with employees. This mix helps capture nuances that a single data point can't reveal.

2. Anticipate signals, don't just react
Not every request for attention is verbalized. Predictive models and behavioral insights can help identify dissatisfaction before it turns into disengagement. Proactive — not just reactive — listening turns a brand into an attentive presence.

3. Humanize data interpretation
Cross what customers *say* with what they *do*. Interpreting numbers with empathy, context, and curiosity turns data into stories, and well-understood stories inspire decisions that are both sharper and more sensitive.

4. Turn listening into culture
Listening doesn't have to be the job of a single department, it can be a shared value. Every team that interacts with the public carries the responsibility (and the opportunity!) to listen to consumers, allowing insights to translate into continuous learning for the brand.

to inspire

Essence Branding was born from a simple yet powerful belief: *listening and observing are the smartest ways to build brands.*

From the very beginning, listening and observation have been at the heart of everything we do, not only as research tools, but as pathways to uncover the true potential of each business, leader, and audience.

In recent years, we've led an increasing number of qualitative studies — including in-depth interviews, focus groups, and immersive journeys — for brands seeking to understand what truly moves people.

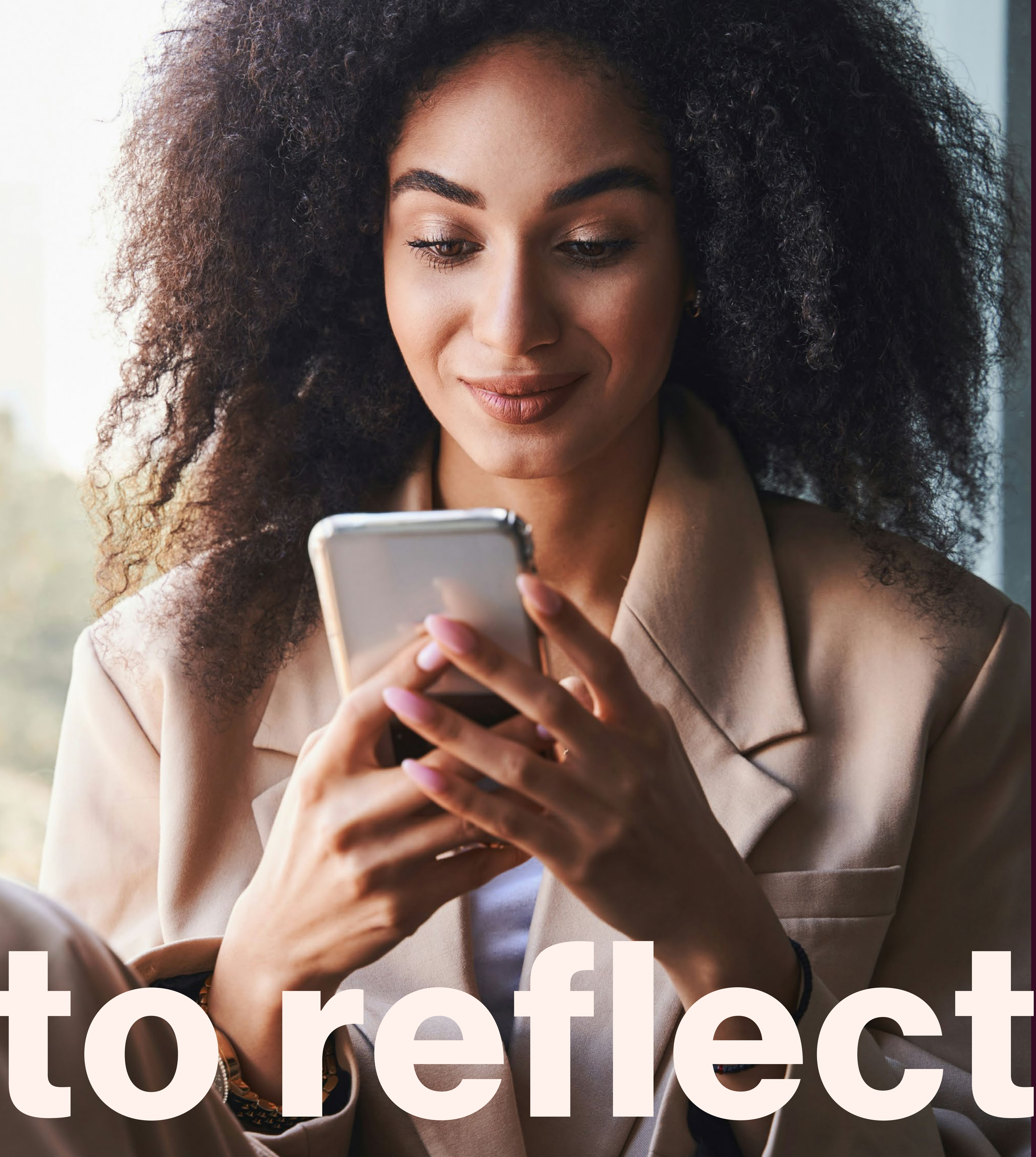
What we've learned is that data tells part of the story, but narratives — and even silence — reveal the rest.

By connecting voices, behaviors, and contexts, we help brands turn scattered perceptions into strategic understanding.

More than measuring, we seek to *interpret*: to translate patterns of consumption, expectations, and emotions through the lens of branding, helping companies make better-informed decisions that are both strategic and true to their essence.

04

Consumers are being moved by the ambivalence between the physical and the digital.



to reflect

You're probably reading this document on a screen. But when was the last time you missed something tactile, tangible, real? The feeling of flipping through a book, trying on clothes, or spending time in a store with no rush, just observing?

And, at the same time, when was the last time you had the patience for a purely physical experience, without comparing prices online, checking reviews, or expecting the convenience of delivery?

We're not entirely in the physical world, nor completely in the digital one. And as a professional, it's worth asking: **is your brand trying to choose a side or learning how to exist in both at once?**

sus-pen-mode.

We live in this in-between space, a state of divided presence. BOX1824 calls it the **"suspended mode."**[11]

"Without realizing it, we started existing in two places at once. And neither is whole."

BOX1824

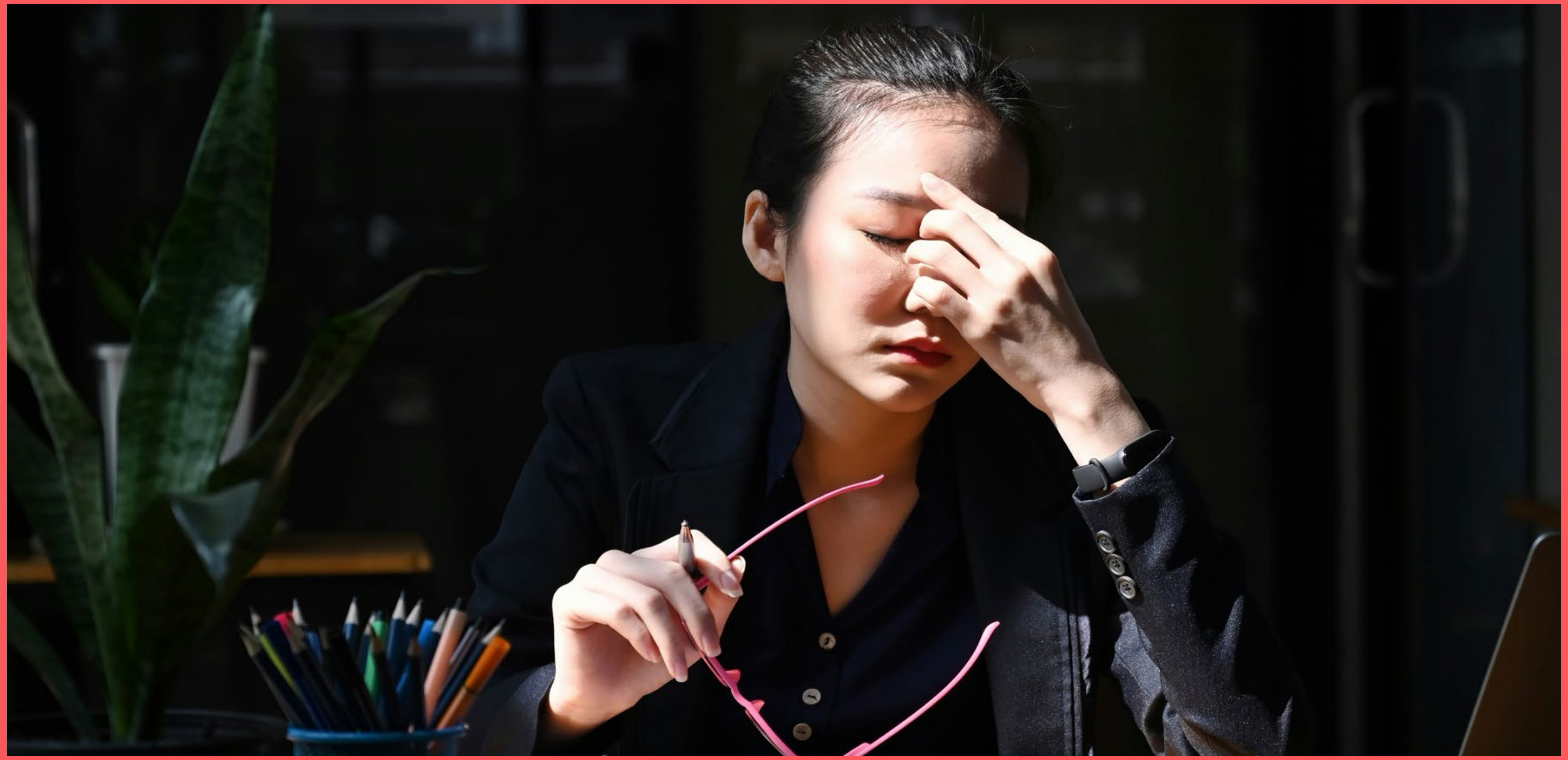
[11] BOX1824. Macro Futures.

This ambivalence isn't temporary — it's structural. **And the brands that understand this stop forcing a choice;** they begin to *orchestrate presences*, not merely integrate channels.

This fragmentation of presence reveals **meaningful contradictions**: social media usage continues to rise, yet trust in it declines. People remain connected but with weaker emotional bonds and a growing perception of noise and misinformation.[12] Consumers want personalized experiences but feel uneasy about how companies use their data. They want to be understood, not watched.[13]

[12] McKinsey. State of The Consumer 2025.
[13] Qualtrics. 2025 Consumer Trends Report.

The dilemma is clear: we seek the convenience of digital, yet crave the humanity of the physical.



Amid automation, there's a growing desire for brands that convey empathy and presence, capable of demonstrating sensitivity even when mediated by technology. Consumers live in a state of *digital dissonance*:

aware that they need technology, yet emotionally saturated by it.

In Brand Insights 2025, we already highlighted *omnichannelity* as the new experience standard — coherence and consistency across channels, not just multi-presence. In 2026, this trend deepens, inviting us to imagine **a life where the physical and digital merge into one continuous reality.**

The digital is no longer an extension of the real, and the real becomes an interface of the digital. The challenge, then, isn't to integrate channels but to orchestrate presences: what begins on a screen may end in a store. What is born in a physical event reverberates online. What happens offline gains scale in the digital, and vice versa.

experimentation

And here lies a strategic opportunity: the coexistence of the physical and digital creates an emotionally ambiguous state, where **wonder and exhaustion** coexist. There is nostalgia for touch and curiosity for technology, turning the **in-between into fertile ground for sensory and symbolic innovation.**

The tension between the physical and the digital is not, after all, a problem to solve, but a field of experimentation, where technology and humanity meet to redefine what is real, sensitive, and possible.

Applicable insights for brands:

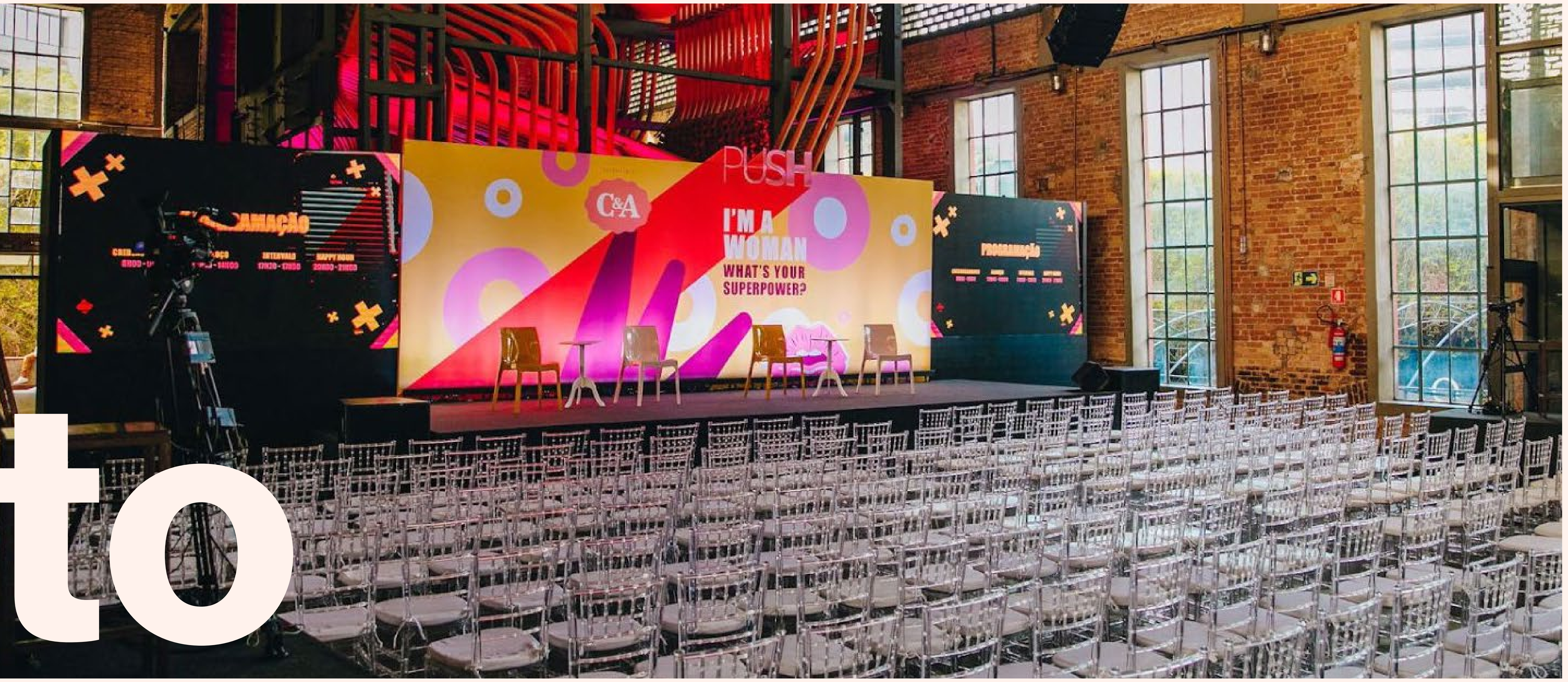
1. Integrate channels with coherence, not just presence
Consumers don't want brands to choose between worlds: they want them to integrate both with consistency and sensitivity. It's not enough to *be* in the physical and digital spaces; those presences need to be connected. The journey should be unified, continuous, and frictionless, with technology serving the experience, not the other way around. In Brazil, human service and sensory touchpoints can still be powerful differentiators when well integrated into the digital journey.

2. Humanize the digital
Bring empathy, imperfection, and genuine presence into automated interactions. Consumers know when they're talking to a bot, but they don't want to be treated like data.

3. Make the physical work for the digital — and vice versa
Transforming physical spaces into living hubs of connection can be highly strategic. When data enhances service, extends relationships, and feeds back into digital systems, the physical stops competing and starts amplifying the journey. Every in-person interaction can generate insights that strengthen online presence, and every digital data point can enrich real-world encounters.

4. Balance personalization and privacy
Delivering relevant experiences without crossing the boundary of trust is a delicate exercise. Transparency about data usage is essential. The line between relevance and intrusion is thin, and must be respected.

5. Create emotional consistency across channels
Ensuring that your brand evokes the same feeling — whether in-store, on the website, app, or social media — can be more powerful than being everywhere. Emotional coherence builds trust; fragmentation erodes it. It's worth asking: does your brand sound the same across every channel?



to inspire

Behind **Alo Yoga's** aesthetic lies a precise engineering of coherence. The brand understood that *well-being* is less a category and more a *state of being*, and it translated this perception into a presence that flows naturally between the physical and the digital. Every touchpoint — from the website and social channels to stores designed as mindfulness "sanctuaries" — is a sensory extension of the same purpose: to inspire presence.

The **Alo Wellness Club** reinforces this philosophy by transforming the digital community into a space of ongoing practice, where those who connect online experience the same spirit as in-person gatherings — as if attending a brand event, even from afar.

In Brazil, **Steal The Look** has made *content* the gravitational center of an expanding ecosystem. What began as digital curation has evolved into hybrid experiences that blend learning, aesthetics, and belonging. From in-office events (famously known as "*the coolest office in town*") to the programs of **PUSH**, its educational arm, the brand strengthens its identity by inhabiting both digital and physical spaces with the same naturalness and personality.

More than replicating formats, **STL** creates *continuity* across contexts, keeping its voice alive and recognizable in every environment it touches.

05

Consumers are being moved by those who move culture.

When was the last time you truly connected with a brand message — not because it was everywhere, but because it *made sense* to you?

Maybe it didn't come from an institutional campaign, but from someone who translated that message in a human, relatable, and vibrant way; someone who managed to connect with you in the right way, at the right moment.

Now, as a brand leader or manager, it's worth asking: **is your brand trying to control the narrative or learning to *co-create* it with those who already hold people's attention, trust, and voice?**

Consumers are no longer moved by brands that speak alone. They're being moved by those who move culture, and culture moves through networks.

moved

By multiple voices, living languages, and codes that reinvent themselves every day. Artists, content creators, community leaders, local trendsetters, and even everyday consumers with knowledge and a voice — all take part in this ecosystem.

Brands that understand this **have stopped searching for *spokespeople* and started cultivating *vision partners:*** people who think, provoke, and create together. Strategic co-creators, cultural architects, translators of meaning. Narratives no longer originate from a single point: they emerge from the exchange among people, collectives, and communities who transform lived experiences into language.[14]

Culture, more than just a territory, has become the new field for building symbolic and emotional value. And those who move culture understand this intuitively. **Their role is no longer just to serve as media, but to *think alongside* brands; to participate in the creative process from the very beginning, helping to shape *what* a brand says and *how* it says it.** Storytelling is now orchestrated in networks. Collaborating with creative minds means investing in living language: where new codes, emerging aesthetics, and authentic connections are born.

[14] GoAd. Paper Cannes 2025.

In previous editions of *Brand Insights*, we already observed this movement unfolding: the rise of micro- and nano-influencers, of employees as natural spokespeople, and of leaders who broaden the dialogue between brands and society. But now the perspective deepens: **it's no longer about *who* influences, but *how* influence is structured within communication itself.**

This phenomenon has evolved beyond the unidirectional (or even bidirectional) relationship between brands and consumers: it's now about *cultural relationships*, where repertoires, contexts, and languages intersect to generate meaning.

culture

Today, the market recognizes **that the creator sits at the center of strategy not because they are a channel, but because they are a *meaning-maker*.** The term expands to include anyone who creates culture, connects people, and translates codes so that brands can exist legitimately within that culture.

What once were one-off activations have now become *infrastructure*. The most powerful brands no longer use culture — they *build* within it, alongside those who move it, acting from the inside out, with respect, knowledge, and presence.

Influence has become *relational architecture,* sustained by multiple voices that together create meaning. Power no longer lies in message emission, but in the *collective intelligence* born from collaboration among brands, creators, and communities.

And that is the defining spirit of 2026: the end of centralized communication and the beginning of an era where influence becomes an essential part of the brand's communication structure itself.

Applicable insights for brands:

1. Participate in culture, not just the conversation
Presence alone isn't enough. Relevant brands are those that enter cultural contexts with authenticity, contributing a point of view and not just showing up passively.

2. Value those who translate, not just those who speak
Contemporary influence lies in those who make meaning; who connect references and transform messages into experiences. These are the people (inside and outside the brand) who build symbolic relevance.

3. Involve creators from the start
Artists, communicators, leaders, and creatives aren't distribution channels — they're strategic minds capable of shaping a brand's narrative with sensitivity and vision.

4. Invest in living language
Communication is no longer a monologue, it's an ecosystem. Working with those who translate cultural codes means investing in repertoire, nuance, and genuine connection.

5. Trade control for co-creation
Influence today is relational. The more space brands open for dialogue and joint creation, the more symbolic consistency and cultural legitimacy they gain.

to inspire

In Brazil, **Chilli Beans** stands out as one of the best examples of a brand that understands culture as a *territory of presence*, not sponsorship. From its vibrant collection with **Ivete Sangalo** to its support of the **Wicked Brasil** musical, the brand connects to expressions of art and performance that embody its irreverent and popular spirit. At the same time, collaborations with figures like **Porquinho da Paulista** show sensitivity to what's happening on the streets; an attentive look at everyday life and the spontaneous voices that also shape behavior. In all these contexts, **Chilli Beans** doesn't *talk about culture*, it lives within it, across multiple layers and languages.

In the United States, the partnership between **MoneyLion and MrBeast** follows the same logic by replacing media with *meaning*. Instead of buying exposure, the brand chose to build a shared narrative with one of the world's biggest creators, using entertainment as a vehicle for financial education. The result is a new form of influence: less transactional, more structural. When the creator becomes a *co-author*, the brand gains cultural legitimacy, and the message circulates not because it's paid for, but because it's *shared*.

key insights

1. Intolerance to friction
Consumers are exhausted by complexity and perceive any form of friction as a lack of respect for their time. Loyalty has become fragile; when fluidity fails, customers leave silently and quickly.

Opportunity for brands: master the basics with operational excellence and turn clarity and simplicity into perceived value.

2. The math of small pleasures
Consumption hasn't declined; it has reorganized. People spend less on impulse and more with intention. Pleasure becomes both an emotional and financial strategy, shaped by small, planned moments of indulgence.

Opportunity for brands: position themselves as emotionally accessible, offering meaning rather than mere stimulation, and creating spaces for attainable indulgence.

3. The silences that speak
Explicit feedback is decreasing because consumers no longer believe they are being heard. Silence has become a form of response that demands behavioral interpretation and sophisticated listening from brands.

Opportunity for brands: diversify listening methods, combine data with human observation, and embed strategic listening into organizational culture.

4. The ambivalence between the physical and the digital
People now inhabit both worlds simultaneously, seeking digital convenience without giving up human connection. The challenge for brands is to orchestrate their presence with emotional coherence across channels.

Opportunity for brands: humanize communication, integrate presences with emotional consistency, and balance personalization with privacy.

5. Those who move culture
Influence is no longer about centralized broadcasting; it emerges from collaborative ecosystems. Creators, communities, and cultural translators have become co-builders of meaning and narrative.

Opportunity for brands: replace control with co-creation, involve creators from the beginning, and participate in culture with legitimacy and genuine presence.

See you at Brand Insights 2027.

About Essence Branding

Where essence meets strategy.

With so many options available, emotional connection has become the ultimate tiebreaker.

Essence Branding was born from the conviction that brands don’t compete only for attention they compete for meaning.

Grounded in consumer neuroscience and a sharp reading of the market, we help companies activate real human connections: from the pulse of culture to the temperature of experience, crafting narratives and identities that build affinity, trust and preference.

Because what truly remains isn’t what a brand says… it’s what it makes you feel.

www.essencebranding.com.br
www.instagram/essencebranding
www.linkedin/company/essence-branding

Bring Brand Insights 2026 into your company.

The forces reshaping consumption are already here and they demand precise, intentional responses from brands.

How can your brand respond with intention, coherence and vision?

With Brand Insights 2026, Essence's strategy team brings these conversations directly to your people. We don't arrive with a fixed script. We arrive to spark reflection. We translate insights into practical understanding, connecting each movement, perception and trend to your business, your consumer and your market.

Your team walks away with clarity on what is changing and with direction to respond intentionally, authentically and aligned with the results that matter for your brand.

Want to open this conversation within your organization? Talk to us.


Credits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