



Sparkling Aussie Joy

Uncovering how joy shows up through community entertainment for Australian Gen Z and Millennial audiences

 **TikTok**

CROWD.DNA



Contents

03	TikTok is defining the Zeitgeist
05	The Aussie context
06	A new playing field
07	Codes →
08	1) Optimise Me
09	2) Identity Unlocked
10	3) Mateship 2.0
11	4) Evolving Australia
12	5) Me Moments
13	6) IRL Inspiration
14	7) Proudly Ourselves
15	8) Collective Memories

This project was conducted in partnership with Crowd DNA.

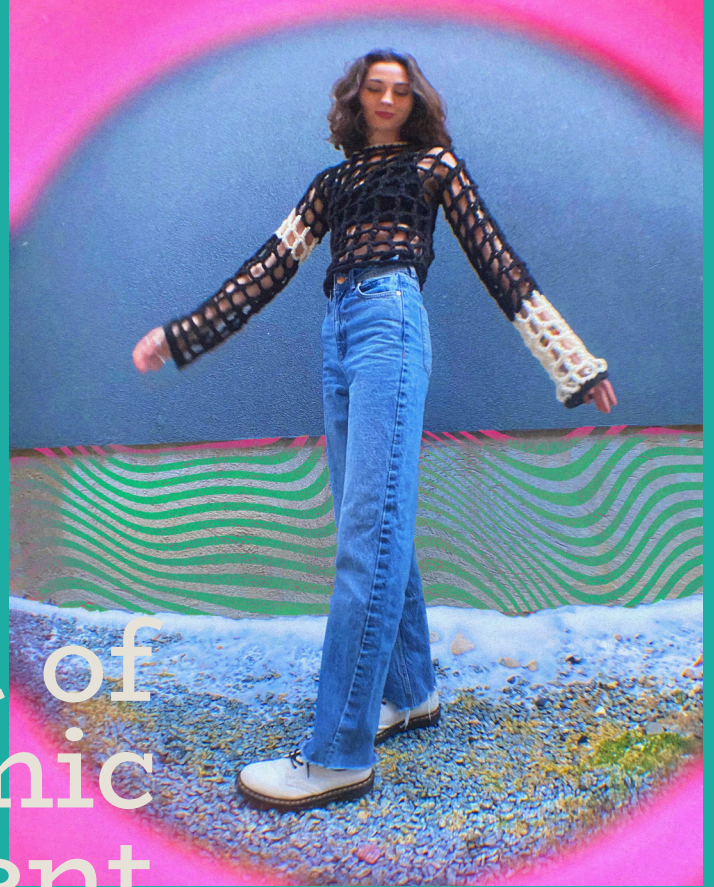
We wanted to uncover the culturally resonant meaning around how joy shows up through community entertainment for Gen Z and Millennial audiences in Australia.

Who did we speak to?





TikTok is defining the zeitgeist of post pandemic entertainment



The platform has paved the way for community entertainment, permanently altering how content creation and consumption interacts and continues to shape culture beyond the app.

The rise of community entertainment, driven by TikTok, has shifted the power dynamic - from passive consumption, to active participation.

Culture is no longer fed to the masses by the few, it's created by everyone in a collective effort. This phenomenon is known as 'new power,' where creators drive culture - rather than the other way around.

"TikTok is a fluid membership, both in and outside of algorithm-driven content. It's a way better community, it's a community without negativity. There's a place for everyone."

– KIN

The reason? It's ability to spark joy for more than 1 billion users across the globe.

The pandemic has given rise to a host of hybrid need-states... and the diversity of the TikTok platform makes it perfectly suited to meet the hybrid needs for Millennial and Gen Z audiences

It's helps them wind down

TikTok provides a safe place to relax, unwind, and escape from the pressures of reality



...and helps them amp up

But it also inspires them to challenge themselves, stay motivated, and become better versions of themselves

It's steeped in discovery

Constant newness piques their curiosity, encourages discovery and keeps them coming back



...and feel private and personal

Yet it also connects them to ideas that are important to them and like minded people

It's hyper global

TikTok instantly connects them to the global pulse, bringing people into perspectives and worlds beyond their own



...and super local

While also being hyper-local, highly relatable, tapping into the desire for Australia to be seen and known

It's frivolous and fun

A space for entertainment, where they're reminded life can be light and things are not to be taken too seriously



...and meaningful and impactful

But simultaneously providing insight into real perspectives, a source of news about topics that matter, and a birthplace of new movements



7 in 10 users
visit TikTok when
they want to feel joy

- TikTok User Engagement Study, Nielsen, 2021

73% of people
on TikTok say they felt
happier after logging on

- Authenticity, Happiness and Joy, Flamingo Group, 2021

But what does this mean in the Aussie context?



TikTok has arrived at an interesting time in Aussie culture. Aussie culture has long existed in a vacuum; defined by a sense of separation from the rest of the world.

But the globalising force of the internet, combined with the impacts of the pandemic, has seen Aussie culture pushing and pulling between two sides of a spectrum.

On the one hand, we're keen to 'hold on' to deeply ingrained ideals (like mateship, self-deprecating humour, and a 'fair go') - and on the other, we're keen to 'move on' - and push Aussie culture forward (through progress, diversity, and more inclusive narratives about what it means to be Australian).

From Inherited Identity → Reimagined Identity

Inherited Identity: Toxic masculinity, problematic politics and the aftermaths of colonialism - these are some of the inherited traits that most young Australians grew up around.

Reimagined Identity: Young Australians are aware that these traits no longer reflect who they are. They are putting these parts of their culture under scrutiny and looking for opportunities to reinvent their identity in real time.

From Flying Solo → Better Together

Flying Solo: Climate crises, political unrest, and some long lockdowns have left Australians feeling isolated and alienated in recent years - culminating in an unprecedented mental health crisis.

Better Together: Harnessing the power of togetherness, mateship and community, young Aussies are coming together to uplift each other and progressing conversations around inclusivity, self betterment and showing up for each other.

From Cultural Cringe → Cultural Confidence

Cultural Cringe: Australians feel a pervasive sense of 'cultural cringe' in the way they see themselves and in how others see them from years of being bogged down by a 'tyranny of distance' and sense of separation from the pulse of global trends.

Cultural Confidence: Leaning into their niche, weird and wonderful humour, Aussie creators seem to have found a place on the global stage, and for once, are ahead of the cultural curve.

From Pursuing Perfection → Embracing Authenticity

Pursuing Perfection: Social media for many years have been about fitting offline experiences to suit online platforms - giving way to constant comparison, inauthentic content and mindless scrolling.

Embracing Authenticity: Young Aussies want to feel good after spending time on social media; they want to feel inspired and seen. Social media is now expected to instead enhance their real life experiences - not set the tone.

A new playing field for Aussie joy emerges.

‘Joy’ may be universal... but against the backdrop of a changing Australia, it’s showing up in new and interesting ways.

The ‘newness’ of the platform, combined with the hybridity of what’s on offer there, has made it the perfect place for Aussies to find joy in new and unexpected ways.

While joy is a universal and age-old emotion, the codes of joy we’ve sought to identify all sit on the ‘emergent’ end of the spectrum - signalling a departure of what we’ve known before, and embracing the now and next, both within and outside the platform

These emerging codes can be grouped by four key themes and plotted against the following axis:



Me

Myself, my identity and my own experiences online

The joy of...

Purpose

Learning, growing, knowing myself, finding my crowd, self actualisation

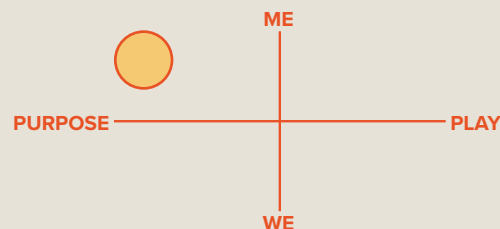
Play

Release, unwind, create and connect over community, entertainment

We

Connection, community, belonging and visibility





Optimise Me

What's happening

Amidst uncertain times, young Australians are taking charge of what they can control and turning inwards to become the best versions of themselves. From meditation to mental health management, TikTok provides a place for learning and equips them with self help tricks that they can then share with others.



How is this playing out?

Realistic Rituals

In a shift away from 'peak health' and unattainable expectations of wellness, Aussies are entering a new era of self optimisation. [Read more](#)

How can brands tap in?

Encourage their quest for self enhancement and self improvement not just by introducing new tips and tricks but by also sharing ways that they can sustain their new way of living.

+300%

Increase in #therapy mentions

+400%

Conversations around 'sleep'

+300%

Conversations around 'exercise'

+250%

Conversations around 'wellbeing'

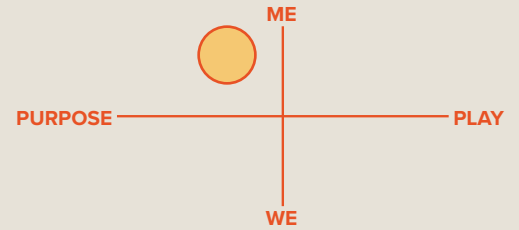
Source: Crowd Signals, January-June 2022

Sample size (datapoints): 73,815

Market: Australia

The opportunity?

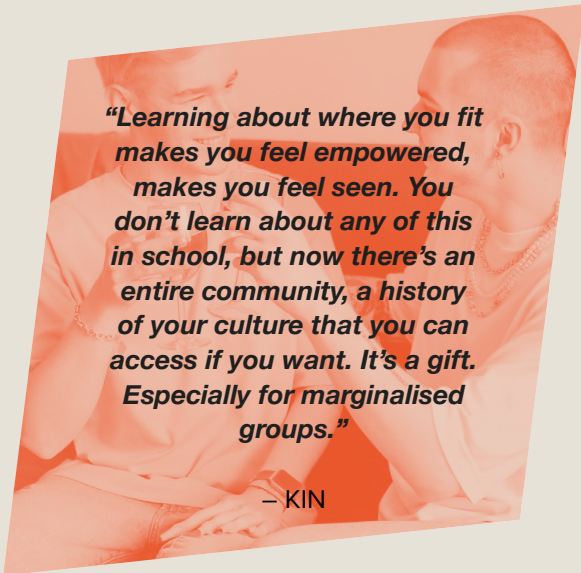
Brands within the **health, wellness, food and fitness categories** can consider playing in this dimension owing to their natural fit with building a healthier, better, more motivated 'me' for Aussies on TikTok, and beyond.



Identity Unlocked

What's happening

Australians are one of the most diverse demographics in the world, sitting at the intersection of culture, sexual and gender identity - to name a few. However the avenues to explore their identity in a safe space are somewhat limited. TikTok mitigates this by providing a critical point of unlimited access to information, communities and context.



“Learning about where you fit makes you feel empowered, makes you feel seen. You don’t learn about any of this in school, but now there’s an entire community, a history of your culture that you can access if you want. It’s a gift. Especially for marginalised groups.”

– KIN

How is this playing out?

Subcultures Rising

Young people are turning away from mass consumed, mainstream media and opting for more niche ways of discovering their identities, passions, values and tastes. [The Guardian](#)

How can brands tap in?

Help Australians find themselves by providing **educational content** especially those not found in mainstream media. Use language that is **inclusive** to create a safe space and ensure that every piece of content **captures the diversity of Australia**.

+1400%
conversations around
'identity'

+78%
conversations
around trans

+300%
conversations
around 'gender fluidity'

+200%
conversations
around 'discrimination'

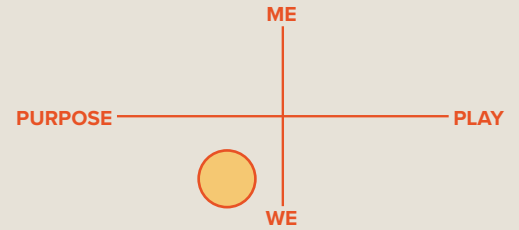
+120%
conversations
around sex and gender

+100%
conversations
around 'race'

Source: Crowd Signals, January-June 2022
Sample size (datapoints): 73,815
Market: Australia

The opportunity?

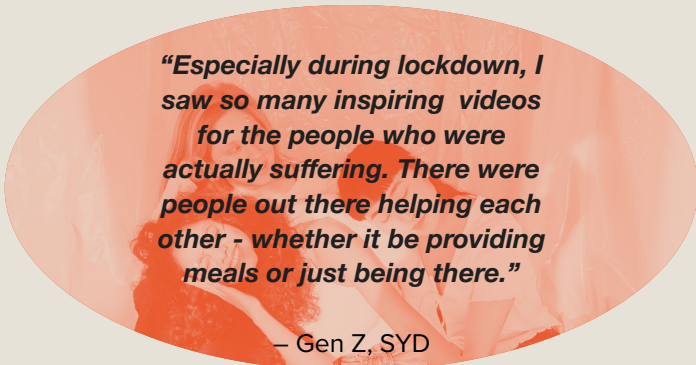
This dimension of Aussie joy as a space is extremely important to young Australians, and as such **every category and brand** should look to embrace, uphold and embody these principles in creating inclusive content.



Mateship 2.0

What's happening

Increasingly, there is a sense that politicians aren't always there to support us, and that the media aren't always sharing the stories that matter. In response, Australians look to each other for support, and unite in showing up for our communities during heavy times. More and more Australians are using TikTok to **inspire good deeds, share where support is needed, start important conversations, and galvanise real-world action.**



How is this playing out?

Crowd Power

Australian comedian and TikTok creator Celeste Barber raised a total of **\$51M** for bushfire relief through social-media powered crowdfunding, at the start of 2020. Source: [ABC](#)

How can brands tap in?

Show up - align action with **existing brand values**, be an active part of the community by **partnering with ambassadors and creators** and don't be afraid to **stand alongside young Aussies** in the issues that matter to them.

+100%
conversations around
'flooding'

+50%
conversations
around 'flood'

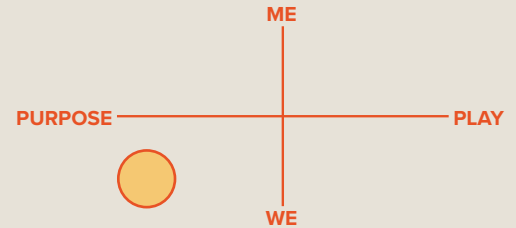
+50%
conversations around
#Climateemergency

+200%
conversations
around 'community'

Source: Crowd Signals, January-June 2022
Sample size (datapoints): 73,815
Market: Australia

The opportunity?

This dimension of Aussie joy lends itself especially well to any brand looking to make a difference, but particularly **food, apparel, NFP's and service providers such as telco's, appliances and tech**, owing to their ability to provide meaningful services and support in trying times.



Evolving Australia

What's happening

Young Aussies are keen to put behind **outdated traits** that have tainted our collective view of what it means to be Australians. Punching up the bits worth celebrating and poking fun at the more problematic parts of our culture to drive the conversation, they are using TikTok to **reimagine our collective national identity**, in real time.



How is this playing out?

Critiquing Colonialism

Australian youth are going against their colonial legacy

How can brands tap in?

Don't be afraid to **take a stance** on things that matter. Leverage on creators that are already out there to further **drive Australia's culture forward**. Our ability to **use humour to share meaningful messages** is what makes us unique and should be played into.

+1500%

Increase in 'decolonising'

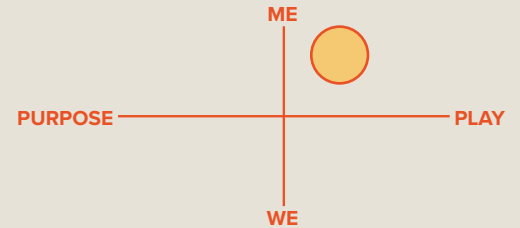
+300%

Conversations around #indigenous

Source: Crowd Signals, January-June 2022
 Sample size (datapoints): 73,815
 Market: Australia

The opportunity?

Legacy Aussie brands - from FMCG, to entertainment, to media, have a place within culture, and the ability to drive conversations and aid in reframing Australia under a new lens.



Me Moments

What's happening

All things considered, it's pretty understandable that **young Aussies are feeling anxious** now more than ever. TikTok has become the antidote to this - providing entertainment that cannot be found elsewhere, its **hyper-personalised, ultra-niche and super relatable** content is just what they need to **feel seen, inspired and uplifted**.



How is this playing out?

Personalised Perfection

It's not just personally relevant content that is making an impact on young Aussies; a wider trend of 'personalisation' from brands is also a key way to create cut-through. - [Ecommerce News](#)

How can brands tap in?

Lean into **niche topics and subcultures** that **fit with the brand** to help audiences feel seen. Use content as an opportunity to **reflect what they see in their world and their mirror back at them**. And don't forget to **have fun!**

78%

like it when brands are part of special interest groups on TikTok

- TikTok Global Community & Self- Expression, Flamingo, 2021
Sample size: 3,500

31%

of TikTok users included "lifting my spirits" as one of the top three reasons for returning to the TikTok platform again and again

- [Nielsen Authenticity Study, 2021](#)
Sample Size: 8,000

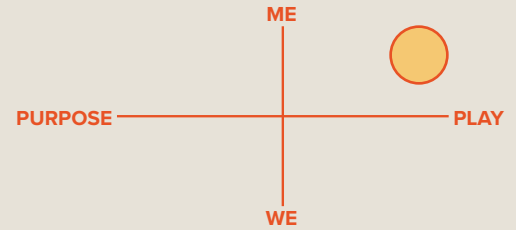
71%

agree TikTok is where people can find communities that suit all sides of their personality

- Understanding TikTok's Impact on Culture, Flamingo Group, 2022

The opportunity?

Owing to their natural fit with individual interests, this dimension of joy is for any brands in the **DIY, hobby, music and entertainment** categories, and anything that involves learning or tutorials



IRL Inspiration

What's happening

It's no secret that **nature, discovery and exploration** are huge drivers for **offline joy** in Australia. And the pandemic has only deepened that desire to unearth more hidden gems. TikTok facilitates that **IRL discovery through URL** - creators are playing tour guide, revealing secret spots, natural wonders and underrated hidden gems around their locale to the TikTok community

"I get to learn about the food and restaurants in my city. The fact that they [Nick & Helmi] are in my local area, I can find new places to go to and try out myself. So it really opens a lot of new possibilities for me"

- Gen Z, NSW

How is this playing out?

Personalised Perfection

Australia is the #1 travel destination post-COVID, with 3 in 4 saying they intended to travel domestically, vs. less than 1 in 3 internationally, in 2022. - [ACM](#), via [The Australian](#)

How can brands tap in?

Australians are hungry for experiences - reframe products as things that will **enable and enhance IRL experiences**. **Show** (don't tell!) what they're missing out on, specifically amping up experiences that are **uniquely Australian**.

+325%

conversations around 'Australia'

Source: Crowd Signals, January-June 2022

Sample size (datapoints): 73,815

Market: Australia

+50%

'things to do Melbourne'

+40%

'restaurants Sydney'

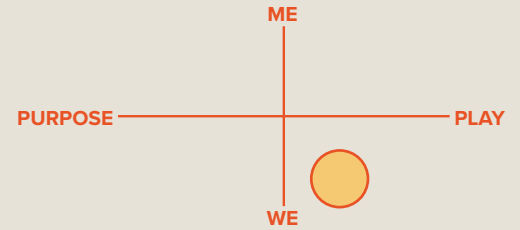
+200%

'things to do Brisbane tomorrow'

Source: [Google Trends 2022](#)

The opportunity?

This dimension of Aussie joy lends itself especially well to brands in the **travel, outdoor, lifestyle, music, dining and entertainment categories**, owing to the natural fit with discovery, locality and IRL exploration.



Proudly Ourselves

What's happening

Australians have always felt **one step removed** from the pulse of global trends giving rise to developing our own flavour of **unhinged, fringe content**. On TikTok, our **unique style of content** appears to have found its natural home. Where we finally have a clear view of the rest of the world, the world in turn is **looking at us for inspiration and entertainment**.

"In the past, viral videos were very American, now it's much more Australian. It's more than just specifically 'oh this is what makes Australians laugh or happy', it gives you a sense of grounding in the world. You're not just importing all the culture."

– KIN

How is this playing out?

Aussie Absurdity

ASkit comedian and TikTok creator [@jimmyrees](#) has achieved national and global fame, both online and in mainstream media, for his depictions of life in Australia.

Read more here: [Jimmy Rees 'Meanwhile in Australia' to hit Binge in OCTOBER.](#)

How can brands tap in?

Leverage on **all things Australian** to make it uniquely 'ours' - the unhinged humour, homegrown talents and local scenery.

+51%

increase in conversation about 'Australia' (when analysing content trends)

'JOY' (33%)

is the predominant emotion picked up in conversation around 'Australian content' and 'Australian creators'

Source: Crowd Signals, January-June 2022

Sample size (datapoints): 73,815

Market: Australia

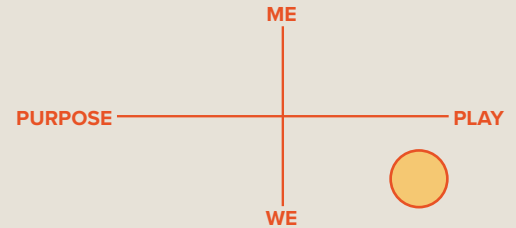
92%

of those who follow aussie creator [@jasminetxo](#) that live outside of Australia

- Sydney Morning Herald, 2021

The opportunity?

While humour may be fair game for all, brands in the **entertainment, music and media** categories should consider playing in this dimension for their uniquely positioned opportunity in elevating Aussie voices.



Collective Memories

What's happening

The diversity of Australia is a huge part of its magic but it also comes with the fact we have fewer individual commonalities. **Finding joy in the things we *do* share**, TikTok provides that playful canvas for 'in-jokes' - **bringing to life the sentimental moments** that shaped all of us.



How is this playing out?

Intersectional Experiences

Podcasters like [@justasianthings](#) have captured the attention and adoration over a generation of diverse young Aussies, as they highlight the hyper-niche (and hyper relevant) memories that bind them as part of Australia's diaspora or migrant communities.

How can brands tap in?

Identify not just childhood exclusive memories but also moments, perspectives, and niche intersectional memories that bind your audiences. Go all-in to truly take people back to a moment in time.

+11%
conversations around 'music' nostalgia

+9%
increase in 'watch' nostalgia

+40%
increase in 'childhood' nostalgia

+8%
'things to do Brisbane tomorrow'

Source: Crowd Signals, January-June 2022
Sample size (datapoints): 73,815
Market: Australia

The opportunity?

This is a playing field that **legacy Aussie brands** can consider tapping into for their ability to spark nostalgia among Aussie audiences.

Thanks
for
reading



CROWD.DNA