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Category Is Dead. Identity Is the New Scarcity.

What actually changed, why most brand strategy is solving last decade's problem, and the moodboard that tells on the whole industry.

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There is a story brand teams keep telling each other about why the old playbook stopped working. The story goes: the algo changed, attention got harder, people are tired of ads, Gen Z is allergic to brands. The story is wrong. It’s a comfortable story because it makes the problem external. The truth is more violent and more useful.

Three things broke at once. Most brand teams have only registered the first one.

ONE. THE FLAT FEED KILLED CATEGORY

For most of the modern brand era, you competed against your category. Eyewear brands fought eyewear brands. Beauty brands fought beauty brands. Coffee fought coffee. There were aisles. There were trade shows. There were category captains. The shelf was the universe and your competitive set was the people standing next to you on it.

The feed flattened the shelf. There is no aisle anymore. There is one vertical scroll that contains an apparel brand, a beauty brand, a bagel shop, a finance influencer, a pottery student, a stand-up comic, a Drake album drop, a sourdough guy, and a sixteen-year-old explaining why she only buys vintage. They are all competing for the same swipe.

Your competitive set is everything the customer could be looking at instead of you.

This is the part most brand teams are still in denial about. They are running category playbooks (positioning maps, share of voice within set, pricing tiers, distribution strategy) on a surface where category does not exist. They are training for a sport that is not being played.

When the shelf was the universe, category gave you a moat. On the feed, category gives you nothing.

TWO. CONVENIENCE USED TO BE THE MOAT

Take a New York twenty-something in 2018. Post-work drinks. A book club on Tuesdays. SoulCycle three mornings a week. An alumni thing on Thursday. A bachelorette upstate. Brunches. Stoops. Roommates. The customer is barely home. The customer's life is full. What the customer cannot get for herself is time, and what she cannot get for herself is reach.

Enter the Warby generation. Warby Parker, Casper, Allbirds, Glossier, Outdoor Voices, Hims, Away, Harry's, Bombas. The whole DTC bench. They didn't sell glasses or mattresses or sneakers or razors. They sold transaction relief. Five frames in a box. Free returns. A clean website. A friendly tone. A price you didn't have to call your mother about. The product was the proof, but the offer was always the same offer. We will save you time. And the algo rewarded them for it. Because in 2018, scale was the scarce resource. The DTC brands had reach the customer didn't have. The customer paid to be associated with reach.

Then 2020 happened. The customer came home. Stayed home. The brunches went away. The book clubs went on Zoom. The alumni thing canceled. The customer had time again. So much time the time itself became the problem.

In a world with infinite time, transaction relief is not a value proposition. It's a feature. Warby didn't get boring because the algo turned on them. Warby got boring because the thing they were selling stopped being scarce. They never solved for anything else.

THREE. IDENTITY IS THE NEW SCARCITY

The customer at home, with time on her hands, is asking a different question. The 2018 question was what saves me time. The 2024 question is what tells me who I am.

This is not a soft observation. It is a structural shift. When time is scarce, the brands that win compress decisions. When identity is scarce, the brands that win confer a self. Different jobs. Different muscles. Different math.

Watch what people actually follow now. A pottery student in Taos with a repeat reel. A guy in Brooklyn who restores typewriters. A woman in Marfa who shoots only on film. A retired butcher in Tuscany teaching salami curing in broken English. None of these accounts are competing on category. None of them are even competing on production value. They are winning because the viewer is not following them to learn pottery, typewriters, film, or salami. The viewer is following them to become the kind of person who follows them.

The follow is an identity claim. The save is an identity claim. The share is an identity claim. The purchase is the loudest identity claim of all.

The customer is no longer buying a thing. The customer is buying a version of herself she wants to be true.

This is why the pottery student in New Mexico has more commercial brand value than the Metropolitan Museum of Art. The Met sells admission. The pottery student sells a self.

FOUR. CULTURE IS THE ONLY DELIVERY VEHICLE

Identity does not transmit through category. It transmits through culture. Culture is the only delivery vehicle the human species has ever invented for telling other humans who you are. Music, food, language, dress, ritual, craft, sport, story. That is how we have always done it. The algo did not invent this. The algo just made it the only thing that scales.

Cultural fluency beats category fluency because culture is the only delivery vehicle for identity, and identity is what the customer is actually buying.

Most readers are with me to this point. Most readers will agree with most of this. And most readers will not be able to do anything about it. Because the work of moving from category to culture is blocked by something every creative director has been staring at for years and most strategists have not yet named.

THE CATEGORY MOODBOARD

The moodboard tells on the brand before the strategy does.

Walk into ten Western brand workshops in a row and you will see the same forty images. Dust on a backroad. Hand-tooled leather under raking light.

Agave at dusk. A weathered man in a felt hat, three-quarter profile, shadow on the eyes. A cantina shot through a doorway. A horse mid-step in golden hour. A pair of hands wrapping a stitch. Wide vista, denim leg, tan boot, no face.

Same forty images. Ten brands. One eye.

This is not coincidence. This is what happens when every team in a category runs the same research, reads the same dashboards, hires from the same agency bench, and benchmarks against each other instead of against the world. The category moodboard is the visual proof of the operating trap underneath. The convergence shows up on the wall before it shows up in the deck. The strategists name it three years after the creative directors have been staring at it.

Western is massively guilty of this. I say it as someone who works inside it. The whole American craft-luxury wave has converged on a single visual lexicon to the point where a customer cannot name which brand made which campaign. The brands are borrowing from each other so hard that the customer is buying the category aesthetic, not any individual brand. Which means none of them are building anchors. They are all standing on the same piece of driftwood, painting it different colors, and pretending it's a different boat.

Beauty has its own version. Wellness has its own version. DTC apparel has its own version. The image bank rotates but the dynamic is identical. Walk through any Cannes reel from the last three years and you can see the categories converging in real time, like ten boats drifting toward the same buoy because the same current is pulling all of them.

The moodboard is the symptom. The traps underneath are the disease. There are three.

TRAP ONE. MIRRORS AND MAGNETS

Most brand teams use research to mirror the customer back to herself. Survey the audience. Code the responses. Build the persona. Listen to what they say they want. Reflect their stated values. Match their stated preferences. Affirm.

Mirroring feels like rigor. It looks like science. It generates decks. It survives committee. And it pulls no one anywhere. Mirrors don't move customers. Magnets do.

A magnet is a brand with its own gravity. It pulls customers toward something they didn't already know they wanted. Apple was a magnet. Nike was a magnet. Patagonia was a magnet. Hermès is a magnet. Liquid Death is a magnet. None of them got there by asking the customer what she wanted and reflecting it back. They built a position the customer hadn't thought of yet, and the customer was pulled toward who she became in its presence.

Mirrors flatter. Magnets transform.

The customer does not want to see herself. She wants to be pulled toward who she is becoming. The customer pays for transformation, not for flattery.

The persona deck is the most over-credited artifact in modern brand work. It tells you what the customer was. It tells you nothing about who she is becoming. And who she is becoming is the only thing that matters.

TRAP TWO. DATA AND POSITION

Data tells you what already happened. Position tells you what you stand for whether the data agrees or not.

Most brands now run on data and call it strategy. They aren't building a position. They are optimizing toward a moving consensus. The result is a thousand brands sanding themselves into the same shape, because they are all reading the same dashboards and chasing the same signals. Same color palette. Same tone of voice. Same hero shots. Same launch cadence. Same influencer roster. The category moodboard you saw two sections ago is the visual face of this trap.

Data is rear-view. Position is windshield.

A position is a claim made before the data exists to support it. A position is what you would still do if the dashboard told you not to. A position is what allows a brand to be early. Data optimizes against the present. Position bets on a future the present hasn't priced in yet.

The dashboard is not the strategy. The dashboard is the inheritance. The strategy is the bet you are willing to make when the dashboard goes red.

TRAP THREE. ANCHORS AND DRIFTWOOD

The brands that last are anchored. They have a center that does not move when the cultural weather changes. Patagonia is anchored to environmental commitment. Hermès is anchored to handcraft. Levi's is anchored to American workwear. Apple is anchored to the intersection of liberal arts and technology. The anchor is not a slogan. It is a place the brand returns to no matter what is trending. It is the gravitational center stories orbit.

Driftwood brands have no anchor. They move with every wave. They reposition every two years. They follow the trend. They show up wherever the cultural current carries them, which is the same place every other unanchored brand shows up, because the same wave brought them all there.

Driftwood looks busy. It launches. It collabs. It hops platforms. It chases the moment. And it goes nowhere, because nothing accumulates. Every campaign starts the brand over. Every launch resets the meaning. The customer cannot tell you what the brand stands for, because the brand has not stood for anything long enough to be remembered.

Anchored brands look slow. They release less. They say no more. They protect a center that costs them quarters but compounds across decades. Their work accumulates. Their meaning thickens. Twenty years in, the customer can finish their sentences.

Driftwood looks busy. Anchors compound.

Driftwood is the natural state of a brand run on mirrors and dashboards. Anchors are the natural state of brands run on positions and bets. You cannot have one without the other. The trap is that mirrors, dashboards, and driftwood reinforce each other. They make a closed loop. The category moodboard is the visible edge of that loop. You cannot escape one without escaping all three.

WHAT THIS MEANS FOR BRANDS

If you are running a category strategy, a research function that mirrors, a dashboard that pretends to be a position, a moodboard that looks like every other moodboard in your category, and a marketing calendar that drifts with the cultural weather, you are running last decade's playbook on this decade's surface. Stop.

Stop benchmarking against your category set. Your competition is not the other eyewear brand. Your competition is the bagel shop, the pottery student, and the Drake drop. Benchmark against attention, not against aisle.

Stop running personas. Run positions. The persona is a mirror. The position is a magnet.

Stop making the dashboard the strategy. The dashboard is the inheritance. The strategy is the bet.

Stop building the category moodboard. Build the brand moodboard that nobody else in your category could build. If your reference wall could be swapped with three competitors and nobody would notice, you don't have a brand. You have a category aesthetic with a logo on it.

Stop running campaigns. A campaign is a category-era artifact. Build a governing position instead. A position is a center the brand orbits for years. You cast stories into it. The stories accumulate into authority. The authority accumulates into culture. Culture is the only thing that compounds.

Stop selling features. Sell a self. Walk into your next creative review and ask the only question that matters now. What kind of person does the customer become when they buy this. If the room cannot answer, you do not have a brand. You have a SKU.

Drop anchor. Stop drifting. The brands that win the next decade are not faster. They are deeper.

THE PROVOCATION

Most of the people reading this are sitting on a category strategy, a persona deck, a dashboard, a moodboard that looks suspiciously like three of their competitors', and a campaign calendar that assumes a buying window. Most of the people reading this are going to keep running that plan, because the plan is what the org chart is built to execute, and changing the plan means changing the org chart. The brands that win the next decade are the ones that change the org chart. The ones that lose share this article in Slack and plan Q3 the same way they planned Q1.

Category is dead. Convenience is a commodity. Identity is the new scarcity. Culture is the only delivery vehicle. Mirrors flatter. Magnets transform. Data is rear-view. Position is windshield. Driftwood looks busy. Anchors compound. The category moodboard is the warning the strategists missed.

The pottery student already knows. The question is whether your brand does.

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