



From audiences to *tribes*.

Ernest 2026 Community Marketing Report: how brands are reallocating spend from ads to communities, and what it means for the next decade of brand-building.

An ernest report

For consumer brand leaders

10,000+ in France

Of a 29M+ global universe

THE REPORT IN 60 SECONDS

Tribes are the new precision layer.

Paid still works. Creators still work. But the marginal next dollar buys less than it used to. The brands ahead of the curve are quietly adding the next layer alongside.

The shift

Audiences are what people say they are. Tribes are what they actually do. Community membership is the only non-declarative signal : repeated, costly, almost impossible to fake.

The map

Four behavioural archetypes – Sweat, Smart, Hospitality, Fandom – cover the rooms your customers already belong to. Most belong to several.

The opportunity

Community is reaching the moment every channel reaches when it goes from "soft brand line" to serious channel: the metrics are finally catching up.

Monday morning

Four moves: **be a patron** before you amplify; **build owned, borrow earned, share with peers**; layer community on top of what you already run; track the metrics that compound.

ONE NUMBER

10K+ communities in France.

ONE QUESTION

Which tribes do your customers already belong to?

01 — WHERE WE ARE

The noisy channels got really good. *And really crowded.*

Targeting works. Creatives ship faster than ever. Dashboards have never been more beautiful. And TikTok publishes 34 million videos a day.

All that capability is running into the same wall: the channels did their job too well, and now everyone's there. Gen Z scrolls past brands without registering them. Marketing teams describe their own feeds as white noise. It's not a creative problem. It's not a budget problem. The channels just got crowded.

Paid still works. Creators still work. But the marginal next dollar there buys less than it used to – and the brands ahead of the curve are quietly building the next layer alongside.

The question isn't whether to add it. It's where.

The answer is the same one humans have always given when the noise gets loud: smaller rooms, fewer people, more trust. Tribes.

34M

New TikTok videos published every single day.

70%

Of Gen Z can't name a brand that feels relevant to them right now.

65%

Of marketers say their message can't cut through socials.

Audiences are what people *say* they are. Tribes are what they *actually do*.

Almost everything we know about consumers is declarative. Surveys. Form fills. Interests they ticked on Meta in 2015 and never updated. "Lifestyle" attributes inferred from a single purchase.

Communities are the opposite. Nobody fakes showing up to a 7am run club for two years. Nobody pays for a ceramics studio they don't care about. Nobody flies across the country for a fandom convention to impress a brand. Community membership is a behavioural signal, not a declared one. It's repeated, costly, and almost impossible to fabricate – which is what makes it valuable.

A tribe tells you, in one data point, what a hundred survey questions can't: what someone values enough to spend their time on, who they trust enough to spend it with, and what kind of brand they'd actually let into the room. The Wednesday-night run club in Paris. The supper club that's been meeting in the same Marseille apartment for three years : some communities have been meeting for years. These aren't segments someone assigned them to, they're groups that formed around something, and stayed.

Community is the only non-declarative proxy for who someone actually is.

03 — THE NEW MAP

The new *map* of social.

There are 29M+ communities worldwide, IRL and online. We've mapped 10,000+ across France – and counting. Four patterns keep showing up. We call them the four clubs, and odds are your customers belong to at least one of them. Often several, and the overlap is where targeting gets even richer.



Sweat clubs.

Run or cycling clubs, Hyrox crews, padel leagues, pilates studios. Built around loyalty showing up at 7am on a Sunday.

BEST BRAND FIT FOR

Performance, athleisure, nutrition, recovery, wellness tech, longevity...



Smart clubs.

Book clubs, debate societies, writing nights, philosophy circles, business breakfasts. Quiet, dense, high-trust.

BEST BRAND FIT FOR

Media, publishing, education, premium B2B, cultural and craft brands...



Hospitality clubs.

Supper clubs, wine tastings, retreats, expat circles, neighbourhood coffee culture.

BEST BRAND FIT FOR

Food, beverage, hospitality, travel, beauty, spirits, lifestyle...



Fandom clubs.

Gaming nights, anime conventions, watch parties, listening sessions, e-sport meetups.

BEST BRAND FIT FOR

Entertainment, gaming, tech, music...

Brands aren't switching channels.

They're adding a layer.

In the last decade, leading brands added what worked, kept what worked, dropped what didn't. The same thing is happening now – and some of the strongest growth in consumer brands is coming from places that didn't exist on the media plan three years ago.

On builds a run club ecosystem online and off. Lululemon turned ambassador programs into a category that lives in studios, group chats, and feeds at once. Glossier grew through a private community of customers before it grew through ads. Duolingo's fandom does more for the brand on TikTok than any campaign brief ever asked for. Patagonia's activist community shows up at protests and in comment sections. They didn't drop paid social, they made room for something new alongside it.

The trade-off is concrete. A paid impression buys a half-second of distracted attention against a rising CPM. A run-club partnership buys ninety minutes of physical presence, conversation between members, two weeks of organic content, and a story.

The community gap was the thing nobody had a name for. Brands knew how to do it once : sponsor the dinner, fund the league, but only when someone on the team had the contact. They couldn't turn it into a repeatable channel. That's why we are building ernest.

— MARGUERITE JAPY, CO-FOUNDER & CEO, ERNEST

05 — THE NEW METRICS

A new channel needs a new *performance language*.

The reason community has stayed a soft "brand" line on the media plan isn't that nobody believed in it. It's that nobody had built the infrastructure to measure it properly. Every channel that's ever scaled : TV, search, social, creators, got serious the moment its metrics did. Community is reaching that moment now.

Three shifts define what community performance actually looks like. Inside ernest, this becomes a working dashboard.

SHIFT 01

From *reach* to
show-up.

Impressions told you who scrolled past.
Show-up tells you who engaged, a stronger predictor of what comes next.

SHIFT 02

From *engagement*
to *attachment*.

A like is a tap.
Attachment is coming back, bringing a friend, repurchasing, recommending.

SHIFT 03

From *visibility* to
brand story.

Visibility is being seen.
Brand story is being talked about by people who weren't paid to do it.

Four things to *do* on Monday morning.

Principles that separate the brands who nail community from the ones who think about it.

01 Be a patron, then amplify.

Fund the dinner, sponsor the league, host the night, back the Discord server, show up in the group chat – then turn on social, content, and paid. The physical or digital presence is what makes the amplification credible. Skip the patronage and the rest reads as advertising.

02 Build your own. Borrow others. Team up with peers.

It took us a decade to figure this out with creators: you build your owned Instagram, you borrow earned reach through influencers, and the best campaigns layer both. Community is the same playbook, with one extra move: shared. Partner with brands whose communities overlap with yours.

03 Use community as a precision layer.

Demographic and behavioural data still work. Community adds what they couldn't reach: values, drivers, intentions, lifestyle. Not what someone is, but what they care about, who they trust, and what they do with their time. It's a depth of context no other input gives, and it stacks cleanly on top of everything you already run.

04 Track the new proprietary metrics.

The metrics that matter for community aren't the ones built for paid media. Show-up beats impressions. Attachment beats engagement. Word-of-mouth beats click-through. The dashboard is different because the channel is different.

WHAT HAPPENS NEXT

The brands that win the next decade won't be the loudest. They'll be the ones who show up early, and generously – where their customers actually are.

That's the layer ernest is built to unlock.

READY TO FIND YOUR TRIBES?

Ernest is building the most comprehensive map of communities in France : 10,000+ and growing, and helping consumer brands activate them with intent. We're opening early access to a group of founding brands.

IF CURIOUS

Read & share

Seven pages on why community matters. Share and discuss it with your team.

[Start here →](#)

IF EVALUATING

Book a 20-min call.

We'll map your category, show you the tribes your customers belong to, and walk you through the platform.

[Pick a slot →](#)

IF READY TO TEST

Join the beta.

A small founding cohort, hands-on onboarding, and a direct line to the team building this for you.

[Join →](#)