



2023

TRENDS

2023 will be all about getting Comfortable with Conflict.

After surveying 750 Americans, studying online behaviors and combing through our proprietary data streams, we have identified five ways we'll see consumers grapple with internal conflict in the coming year. The push and pull of opposing forces are emerging across many spheres of society, and in 2023, we'll see it concentrate on identity, youthfulness, ambition, technology, and activism.



Identity: **Uniquely United**

A desire to visibly stand out from the crowd vs. A need to fit in



Youthfulness: **Honey, We Lost the Kids**

A culture obsessed with staying young and relevant vs. Youth feeling the weight of the world's future on their shoulders



Ambition: **Anti-Capitalist Millionaire**

A rejection of hustle culture vs. Entrepreneurial aspirations



Technology: **Dated Digital**

Blurring lines between real and virtual vs. Legacy tech no longer suited for the modern reality



Activism: **Fight or Flight**

An existential drive to fight for the future vs. Coping through escapism

These five manifestations provide distinct opportunities for brands and media in 2023 and beyond, specifically:

- 1** Rethink the future of broad reach and age demos
- 2** Move beyond demographics to connecting with people's underlying emotional drivers
- 3** Galvanize consumers through actionable (not just inspirational) media
- 4** Create more modern digital experiences
- 5** Choose actions over words



People struggle to balance a desire to stand out from the crowd with the need to fit in and connect with others.

Youth of today have the drive to create their own personal brand and a need to be different. Breaking convention and showing your individuality is critical to making you matter. But standing out can also be lonely, and people still want to fit in. As teens cope with the repercussions of 2.5 years of solitude, they also find comfort in connecting over viral online trends.

Rebels



Keeping Up with Gen Zers Demand for Individuality
Published on August 5, 2021



"I have multiple Twitter accounts. One for my professional persona, my social persona, and sexual persona."

- Male, 23 (dScout)

64%

of people under 35 say being unique is important to them (Suzy custom study).

68%

of people say they express different parts of their personality with different people and spaces (Suzy custom study).

Whether it be your fashion choices, your expression of your gender identity, or your musical taste, celebrating your individuality is vital. And what individuality looks like is also morphing: 10 years ago, Millennials' tattoos were an emblem of originality, but today's Gen Z wants their identity markers to be less permanent. The flexibility to adapt and mold different parts of their personality based on how they feel at a given moment is critical to a sense of self.

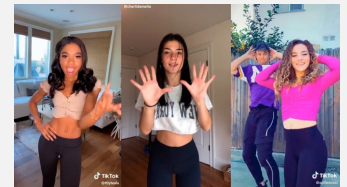
Key Drivers: Status, Authenticity



Brand Spotlight:

Cosmetics subscription brand Smashbox fills its Instagram account with pictures celebrating different skin tones, gender identities, and concepts of beauty, encouraging customers to celebrate their individuality and continuously reinvent themselves.

Replicants



49%

of people say being accepted by their peers is important to them (Suzy custom study).

38%

of Gen Z TikTokers say they have participated in a TikTok challenge before (Suzy custom study).

Despite a desire in other arenas to stand out, the fashion of 2023 looks an awful lot like homogenous fashion from 2003. And nothing feels more of the moment than jumping alongside a million of your closest friends to do the latest TikTok challenge. Despite a desire for individuality, we converge on the same ideas of what's "unique." These macro trends help people feel connected to something bigger than themselves—an endeavor the pandemic has made particularly hard.

Key Drivers: Acceptance, Belonging



Brand Spotlight:

Tapping into the still popular "coastal grandmother" aesthetic, Gen Z is monogramming L.L. Bean's signature beach tote bags not with their names but with phrases ripped from memes and pop culture.



A culture obsessed with staying young and relevant is simultaneously leaving youth feeling the weight of the world’s future on its shoulders.

When it comes to the biggest public arenas, Gen X and Boomers have not let go of their mantle. These Americans still dominate the highest-paying and most powerful industries. So where are the kids? Probably stressing out over climate change, racial justice, and student debt. While generations of adults find new ways to remain ever-youthful, their children and grandchildren now inhabit a place where they feel forced to grow up too fast and tackle long-term societal problems instead of just being kids.

Forever Young

Young Voters Are Fed Up With Their (Much) Older Leaders

Led by politicians often three times their age, many voters under 30 are hungry for new blood and new ideas.

77%

of Americans over 40 say that being culturally relevant is at least somewhat important to them (Suzy custom study).



The global anti-aging market is expected to grow

2X

over the next 9 years (from \$60B to \$120B) (Global News Wire).

Of the Top 20 biggest budget theatrical releases this year, only two had lead actors under 30 (both featuring Tom Holland). For many younger creators, breaking through in traditional spaces still dominated by the same people from 20 years ago feels extra hard. This obsession with preserving one’s youth is ironically ages old, but the 2023 version is more prevalent than ever. What started with adult coloring books and summer camps a few years ago has become an entire economy based on claiming youth for as long as possible.

Key Drivers: Relevance, Escapism



Brand Spotlight:

Late in 2022, McDonald’s introduced limited-time Happy Meals for adults, with figurines styled after old McDonald’s characters. The activation was a huge success as people rushed to get a taste of their childhood.

Never Young

FAMILY TREE | HOW WE LIVE

Kids getting older younger: Are children growing up too fast?



68%

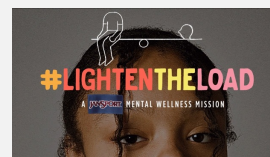
of Americans say young adults today will be financially less well off than previous generations (Pew Research).

75%

of teens say they worry about the state of the world often (Suzy custom study).

Let’s face it kids today have it tougher than generations that preceded them. Even many parents worry their kids are growing up far too quickly. From active shooter drills in kindergarten to middle school protests for climate justice to high schooler disillusionment with college debt, young people today have a lot that could weigh them down. And with these burdens comes a sense of resentment that the adults in the room have let them down. It’s no surprise that 55% of young adults say they have sought treatment for or been diagnosed with a mental illness (McKinsey).

Key Drivers: Safety, Security



Brand Spotlight:

JanSport asked kids across America to unburden themselves by sharing their mental health stories and stitched together the responses they received into a video series aimed at destigmatizing their struggle and showing them they’re not alone.



Ambition: **Anti-Capitalist Millionaire**

People have grown disillusioned with hustle culture but are still driven by entrepreneurial aspirations and visions of financial grandeur.

Five years ago, we couldn't stop talking about the promise of the gig economy. The honeymoon phase is over. More and more Americans are growing disillusioned with hustle culture, seeing it as toxic and sometimes dehumanizing. There's a renewed focus for many on quality of life and a questioning of the promise of capitalism. These same folks, though, are also pragmatic, and for many, instead of this being a call to slow down collectively, they feel the pressure to leapfrog others to success.

Hustle Hater



OFF
'Quiet quitting' isn't really about quitting — it's about burnout
Here's what managers should know

77%

of adults under 35 support labor movements and unionization (+13% more than the general population) (Insider Intelligence).

60%

of Americans say enjoying what they do is one of the most important career considerations for them, beyond financial gain (Suzy custom study).

For years, side hustles were synonymous with financial empowerment. But is all that hustling worth it? After all, ¼ of adults under 35 do not expect they'll ever be able to retire, and 46% do not expect to ever own a home (McKinsey). Disillusioned with the hustle, many US employees are shifting their focus from salaries to quality of life. In the words of one TikTok user, "I don't want to be a girl boss. I don't want to hustle" (Vox Media).

Key Drivers: Mental Health, Individuality



Brand Spotlight:

App Blind joins F*** You Pay Me and other tech platforms that create spaces for employees to complain about their employers. Its popularity grew in the past year as people returned to offices and corporate resentment surged.

Overnight Celebrity

CAREERS
Deloitte: Almost Half Of Gen Z Workers Live With Financial Anxiety Every Day



Gen Z is

38%

more likely than others to say being financially successful is one of the most important things for them in their career (Suzy custom study).

1 in 4

Gen Zers aspire to be a social media influencer, and only 7% say they did not want to be one (The Hill).

44% of people say they worry about money often, and people know they still have bills to pay (Suzy custom study). This pragmatism and financial anxiety are driving many younger Americans to look to entrepreneurship as a quick path to financial independence without the perceived indignities of corporate America. In this pursuit of quick success, though, many find that they're trying to capture lightning in a bottle and find themselves in an eerily similar place to hustle culture.

Key Drivers: Independence, Anxiety



Brand Spotlight:

Workwear brand Carhartt, a brand that has recently seen a second life as a streetwear brand for Gen Z, is hoping to show its younger consumers that a career in the trades can give them the financial stability they crave without the corporate drudgery they fear. Their campaign simultaneously seeks to address the trade sector's employee shortage.



The lines have blurred between real and virtual, but the tech platforms our world is built on are no longer suited for this modern reality.

The line between virtual and IRL continues to march steadily toward obsolescence, and people entering the workforce today can barely remember a time before they had the internet perpetually in the palm of their hand. Daily life involves invisible travel between the digital and analog worlds for these people. And yet tech—once heralded as the playground for young upstarts—is aging just like any other industry. Between Zuckerberg and Meta, and Musk and Twitter, tech itself is due for a major disruption.

Virtual IS Reality



55%

of people say their lives are moving more into the digital realm (Accenture).

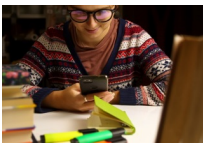
Americans expect

20

minutes more on average on digital devices in 2022 than in 2020 (eMarketer).

For years, tech had been largely seen as a tool that augments but does not substitute “real life.” But as Gen Z and Gen Alpha age, the distinction between real and virtual has become largely moot. Younger customers see technology not just as a way to power the IRL parts of their life but as an extension of it. This shift is more than just functional. It’s philosophical.

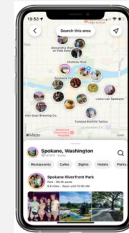
Key Drivers: Identity, Convenience



Brand Spotlight:

Textbook manufacturer McGraw Hill created an app to correspond with some of its books that augment typical classroom learning with TikTok-style videos to help kids process information in ways they’re more used to.

Geriatric Tech



1/4

of Gen Z says it uses Facebook less than they did a year ago, and more than 1/3 say they have never used the platform (Suzy custom study).

40%

of Gen Zers say they prefer searching for things via TikTok or Instagram instead of traditional search tools like Google (NBC).

Following reports of Meta’s financial issues, Mark Zuckerberg noted that he had “missed a giant shift in social networking.” And indeed, he’s not alone. Across the board, legacy tech giants like Twitter and even Google are finding that younger audiences have a completely different way of engaging with tech—one that they aren’t well-suited to accommodate.

Key Drivers: Legacy, Inertia



Brand Spotlight:

In an attempt to compete with TikTok, Instagram announced a series of updates that allowed the ability to post full-screen. This signaled recognition that culture had moved from static photos to videos, but the experience was so chaotic that users demanded the app retract the updates.



Activism: **Fight or Flight**

Consumers feel compelled to fight for the future, but fears of futility can leave them turning to escapism for relief.

For many Americans, fear of climate change, social justice, gun violence, and curtailed reproductive rights are constantly on their minds. While once mistaken as apolitical, Gen Z and Millennials are showing up at polls and protests in record numbers. And there is intensity on both sides of the political spectrum. But for all the vocal Americans, there are also growing numbers turning to escapist pleasures to avoid the world outside their doors. Indeed, escapism is as pervasive as the alternative.

Avid Activist



75%

of people say they have done at least one cause-based action within the last 6 months (Suzy custom study).

Gen Z is

3X

more likely to have attended a protest or strike in the last 6 months than Gen X or Boomers (Suzy custom study).

Gen Z and Millennials are twice as likely to think America has fallen behind other world countries (Pew Research), and they see the need for change to be both profound and urgent. After years of being criticized for perceived civic apathy, younger adults and teens have become activist behemoths. For these Americans, change is necessary, and there's no one else to create it but them.

Key Drivers: Purpose, Fear



Brand Spotlight:

Beer label Corona partnered with non-profit Oceanic Global to create "Corona Island," an ecotourism destination for consumers seeking to learn how to live more harmoniously with nature. The island is 100% plastic-free and aims to inspire consumers to find ways to be more sustainable back home.

Escape Artist



82%

of people say they at least occasionally find ways to avoid thinking about problems facing society, and 79% say they feel overwhelmed by them (Suzy custom study).

60%

of people say there are parts of their lives they prefer to conduct in an immersive virtual world versus the physical one (McKinsey).

With anxiety mounting, many Americans find solace not in activism but in the opposite: evasion. For some, it's a coping mechanism for fear of the future; for others, it's crippling paralysis from not knowing how to help. Regardless, escapist activities like simulation games and reposting frivolous memes help people forget (at least temporarily) about all that makes them nervous about the world outside their doors.

Key Drivers: Safety, Anxiety



Brand Spotlight:

Fashion brand Kate Spade launched its Fall 2022 collection within the Metaverse by turning a New York mansion into a tourable virtual showroom. Users can live out an escapist fantasy within the space where they change décor, play musical instruments, try on products, and interact with others on a "kindness wall."

2023

Media Implications

As we head into 2023, it's clear media is facing an inflection point. People might be spending the year mired in contradiction – but they're okay with that! Brands and media and a huge opportunity to help people navigate the duality of their lives and feel comfortable leaning into both ends of the spectrum:



Mainstream **isn't dead.**

We live in a bespoke, sub-cultured world, but points of commonality still exist, and personalization can still be scalable. Creating consumer experiences that allow people opportunities for individualization but the ability to share a common thread with others can address this tension between being unique and being united.



Age demos **are passé.**

As kids' behavior ages up, their mindsets age too. This will fundamentally change what is relevant to them and what is appropriate to message to them. We've developed industry guidelines on targeting children based on the assumption that they act and think their age. With this assumption out the window, these regulations might need to become more stringent to avoid exploitation. And as for the adults, the persistent wave of nostalgia calls into question whether age helps determine relevance for them as well.



Make media useful to people, **not just brands.**

Gen Z and diverse audiences don't need your inspiration; they need tangibility. Rethink the role of media within your customer ecosystem to provide something helpful to them—concrete experiences and actions to help them and the communities they care about.



Declutter **digital.**

The foundations of our digital concepts and products are based on legacy systems by default. But there are newer platforms and ways of designing digital experiences that eliminate what many see as the clutter outdated tech brings with it. The next wave of digital will require us to redesign experiences in a way that inherently understands the seamlessness modern audiences need between IRL and virtual spaces.



Know your place and **follow through.**

Doing what's right has gotten more complicated and harder for consumers. For some, this can result in paralysis. Brands have the opportunity to alleviate this by harnessing owned channels to show concrete steps they've taken towards a more ethical future and help people feel that supporting their brand, in turn, supports the cause. But consumers will only be inspired by brands they feel have earned the right and relevance to speak on the causes they choose.

Curious to see how our five trends evolve in 2023?

Interested to see how brands have tapped into people's newly found comfort with conflict?

Stay on the look out for our mid-year update.