



2023

TRENDS

REFRESH

At the beginning of 2023, we identified five major trends that were impacting the lives of Americans across the board. The underlying theme to each dynamic was the comfortability with conflict – yesterday vs. tomorrow, themselves vs. others, the duality of values vs. behaviors. While that remains true with half the year passed, half to go, we revisited these trends to examine shifts that have taken place, new dynamics that have emerged, and where we think we're heading for the remainder of 2023.

2023 will be all about getting Comfortable with Conflict.

As a mid-year check-in, we surveyed 1,000 Americans to understand how they were behaving, perceiving, and feeling about 2023 so far, and how they were viewing the months ahead. Across the board, the five trends that were identified at the beginning of the year still resonate, but have evolved, deepened, and in some cases converged as consumers have navigated new dynamics in culture.



Identity: **Uniquely United**

Rebels & Replicants: A desire to visibly stand out from the crowd vs. a need to fit in

Consumers are becoming comfortable in the duality of their identity, seeking out experiences that fuel their desire for belonging while giving them the freedom to express their identity in those settings. The recent opening weekend blowout for 'Barbie' showcased this as fans upon fans flocked to the movie dressed in their own unique pink-fueled ensemble. Because if Barbie taught us anything, it's that we can be whoever we want (even when we're all together).



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

Forever Young & Never Young: The obsession with youth and relevancy vs. youth feeling the weight of the world

The culture of youth is having a heyday so far this year between nostalgia and perfection. Brands such as McDonald's tapped into memory lane by launching Grimace's birthday party, and TikTok released an unnervingly realistic filter (Bold Glamour) that drastically remolds your face. While the former was a huge success, the latter ignited shock and backlash. Younger consumers in particular spoke out about how the filter perpetuated unrealistic beauty standards and may be harmful to their mental health. For a cohort already under an intense and growing amount of stress, this was one more uphill battle they'll need to fight.



Ambition: **Anti-Capitalist Millionaire**

Hustle Haters & Overnight Celebrity: A rejection of hustle culture vs. entrepreneurial aspirations

The Great Resignation is over. And while the economy has been playing a 'will they or won't they' game with a recession, between cooling inflation and dwindling job postings, the dust has started to settle. The reflection and pivots that many consumers made in their lives during the pandemic to avoid the hustle have morphed into pragmatic permanence. With the added pressure of student loans not being forgiven, many young consumers are focusing more than ever on financial stability while balancing their optimistic entrepreneurial spirit.



Technology: **Dated Digital**

Virtual IS Reality & Geriatric Tech: Blurring lines between real and virtual vs. legacy tech losing modern relevance

Technology continues to rapidly advance as social platforms rapidly transform. At the beginning of 2023 we predicted that aging tech was due for a disruption, and disruption sure came – from none other than the original trailblazer – Zuckerberg, in the form of Threads. As Twitter continues to stumble, Threads, Mastodon, and BlueSky are watching to see who will fall into irrelevancy and who will succeed as the 'next big thing'.



Activism: **Fight or Flight**

Avid Activist & Escape Artist: An existential drive to fight for the future vs. coping through escapism

The first half of the year brought a magnifying glass to climate change as the US battled unprecedented heat waves and air pollution that drifted over from the Canadian wildfires. As we collectively lived through the the hottest days ever recorded on Earth this summer, consumers are coming face-to-face with stark realities, while the urge to evade the challenges becomes not just mental, but physical as people seek shelter from the swelter.

2023 Trends IRL



Identity: **Uniquely United**



70%

of Millennials find it important to express their personality through their style, and 57% say it's important to be accepted by their peers. (Suzy custom study).

198MM

Views of #barbieoutfit as consumers show off their own unique spin on pink ensembles with the masses (TikTok).



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



74%

of consumers rank 'aging with grace' as extremely or very important to them. (Suzy custom study).

3/5

of the highest grossing movies so far in 2023 are based on nostalgia (Box Office Mojo). *Super Mario Brothers, Barbie, Little Mermaid*



Ambition: **Anti-Capitalist Millionaire**



57%

of Gen Z say that being financially successful is one of the most important things for them in their career. (Suzy custom study).

18MM

views on Tik Tok for #LazyGirlJob which is the latest iteration of "quiet quitting" among GenZ and Millennials. (WSJ)



Technology: **Dated Digital**



30MM

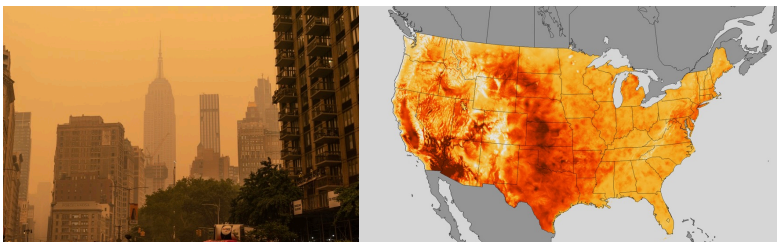
people signed up for Threads in the first 24 hrs, becoming the fastest growing app of all time (Meta).

23%

of consumers use Twitter less than they did a year ago (Suzy custom study).



Activism: **Fight or Flight**



92%

of consumers worry about climate change to some degree (Suzy custom study).

2/3

of consumers say large businesses and corporations are doing too little to reduce climate change effects (Pew Research)



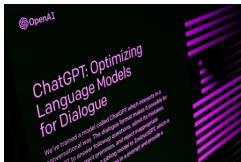
NEW TREND ALERT

Artificial Intelligence: **Friend or Foe?**

Consumers are in an exploratory phase of AI, navigating its vast capabilities and discovering how it enriches and streamlines their lives.

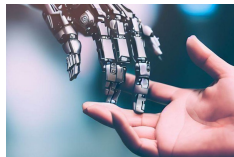
A mere six months ago, Chat GPT was still something that most Americans had to Google to find out about. Fast forward to mid-2023, and our knowledge of AI platforms has rapidly expanded and touched nearly every aspect of everyday life, and even inspired a few congressional hearings already. Gone are the days when it was just Alexa and Siri – now consumers are tapping into not just analytical AI to improve efficiency on tasks or answer questions, but generative AI, to create new content across creative playgrounds with the touch of a key. But the jury is still out on how much we can trust the tech, and how good it is for humanity.

Elective Support



26%

of people have signed up for an AI Platform within the last 6 months (Suzy custom study).



The AI market is expected to see an annual growth rate of

37%

Over the next seven years (growing up to \$1.8B) (Grand View Research).

While Chat GPT is arguably the most notable AI platform that has garnered attention, it is far from the only player. Our survey respondents listed 33 different platforms they've explored in the past six months. While most uses are utilitarian in nature (e.g. research, productivity, education, etc.) a small cohort of consumers are exploring a more emotional relationship to the technology – seeking out AI as a form of companionship. As AI evolves to become even more attuned to human needs and dynamics, technological connection that blurs the lines between authenticity and automation will only continue to grow.

Key Drivers: Efficiency, Curiosity



Brand Spotlight:

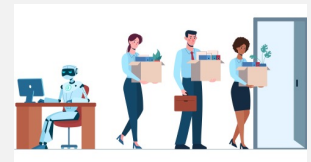
The language learning app Duolingo rolled out a new subscription tier that is powered by AI. Aimed at providing more personalized tutoring, it partnered with OpenAI to offer more responsive and customized lessons that turbocharge your learning progress.

Dangerous Design



76%

of people say they are concerned with misinformation from artificial intelligence tools such as Chat GPT, Google Bard, etc. (Forbes).



77%

of consumers are worried that AI will cause job loss in the next year (Forbes).

Despite the incredible advances that AI has made in such a short time already in 2023, many Americans approach this new technology with a mix of curiosity and caution. Early errors in the tech revealed the dangers of relying solely on AI for answers to questions, and its generative capabilities are raising new questions about IP infringement. In other areas, AI's potential impact on jobs is becoming clearer. The use of it in TV and movies has already catalyzed the first SAG/AFTRA strike in over 37 years, due largely to the threat of using AI as a replacement for extras, a move that if successful, would disrupt and displace an entire industry forever.

Key Drivers: Anxiety, Security



Brand Spotlight:

With the need to constantly feed their content engine, TikTok has rolled out an AI script generation to write ad scripts for creators in a matter of seconds. While it still urges human oversight, the platform is using AI to blow through writer's block so the the videos keep coming.



NEW TREND ALERT

State of the Woman: **Newfound Feminism**

New narratives around old icons. De-stigmatizing historically taboo topics. Equal playing fields (literally). Women are re-writing what the future holds by taking things into their own hands with fresh energy.

While women have been fighting the good fight for decades, a recent surge of businesses, celebrities, movies, and mothers are re-igniting the urgency and agency women have in their own lives. We've seen hot flashes addressed on live TV, global champions finally achieve pay equity, a reimagined, feminist tale about Barbie, and more. There's a growing comfort emerging around women not just asking for what they want/deserve but creating it themselves. With this growing energy, especially leading into an election year on the horizon, we're certain women will continue to pave new roads well into the back half of this year and beyond.

Hear Us Roar



66%

of women feel positively or very positively about their health and wellness looking into the remainder of the year (Suzy custom study)



6.4M

people tuned into the USWNT opener which was the most watched English broadcast of WWC group stage match in US history; up 99% vs. the 2019 USWNT opener. (Yahoo Sports; Fox)

Women are setting the record straight by highlighting their role in history. Along with recognition and basic human rights, health and wellness are behind many major efforts. Topics like menopause are being talked about more openly so far this year, resulting in self-proclaimed "Menopause Movement." Drew Barrymore even experienced her first perimenopause hot flash live on the air— which resulted in her being deemed "real & genuine." Naomi Watts created a new menopause brand and Kristen Bell was named the Mental Health Ambassador for Hers, a health and wellness platform. Across the board women are using their voices and power to demand change, transparency, and open support for their journey through all stages of life.

Key Drivers: Empowerment, Community



Brand Spotlight: Julie

Emergency contraceptive brand, Julie, released a cheeky and humorous ad for their product, by showcasing two women arguing for the last box on the shelf. Written and directed by a woman, the ad brought a new tone of voice to what has historically been a contentious and at times taboo topic for women.

Room For More



31%

of women reported having anxiety this spring vs. 24.5% of men (US Census)

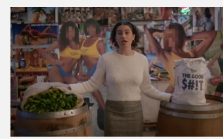


41%

of GenZ and Millennial women claim they worry about their safety "very often" compared to 31% of men (Suzy survey)

Despite the conversations and movements that are happening this year, there is still work to be done— especially as we enter into an election year in 2024. Womens' rights will likely be a topic fueling the ballots. Unfortunately, even the bold positions taken by brands like Miller Lite come with backlash and threats of boycotts. Taking a stand for women, whether you are a consumer or brand, often comes with risks. Women have made enormous strides in sports but had to fight tooth and nail for better pay and will have to continue to fight for equal rights in athletics, from college sports to pro. If 2024 and years beyond can keep up the pace fueled by empowerment and determination in 2023, we will continue to see traction YOY.

Key Drivers: Anxiety, Equality



Brand Spotlight: Miller Lite

Miller Lite released an ad during Women's History Month calling attention to the role women played in the first beer brewed. The brand is also buying back beer paraphernalia from the 70's and 80's that shows women in a sexist light.

2023

Media Implications

As we head into the back half of 2023, consumers are continuing to dance with contradiction, and face the evolving dynamics of a world constantly in flux. Brands should identify opportunities to guide people through their duality and navigate the spaces on both ends of the spectrum.



Mainstream **isn't dead.**

Rethink the future of broad reach and age demos

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.**

Move beyond demographics to connecting with people's underlying emotional drivers

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.**

Galvanize consumers through actionable (not just inspirational) media

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.**

Create more modern digital experiences

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.**

Choose actions over words

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.



NEW!

Design with **purpose.**

Prioritize novel creation and utilization over displacement

We are only in the very early stages of AI adoption by the masses. But if early responses have taught us anything, it's that consumers are torn between the benefits and the risks of handing over parts of our lives to the machine. As we continue to navigate this uncharted era of technology, brands can be a force for good by helping people discover valuable use cases while still celebrating the value and imperfection of humanity.



NEW!

Champion **authentic voices.**

Showcase real moments, with real people, in real contexts

If 2023 has shown us anything, it's that women truly love to support women, and see themselves with authenticity. Lean in (pun intended) to opportunities that bring fresh, timely perspective to old assumptions that no longer serve a purpose. Identify avenues to lend support and create new narratives for women that showcase the power of females in this world.

Curious to see how our ~~five~~ six trends evolve for the rest of 2023?

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

Stay on the look out for our 2024 Trends prediction!