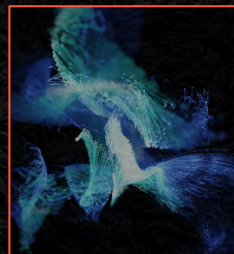
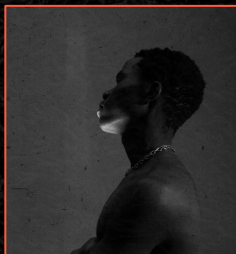
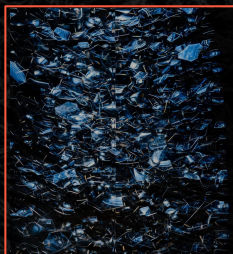


# THE CONSUMER LENS

on trends



# WHY GET THE CONSUMER LENS



To unlock  
cultural  
**insight**



That **inspires**  
resonant  
creative



Every year,  
we see a  
tsunami of  
trend reports....

...and while the potential impact on consumer behaviour is central to these stories, a critical piece of the puzzle is so often missing:

How trends  
show up in  
the lives of  
consumers.

## THE THINKING

Seeking to ground trends in lived experience,  
we wanted to draw on the strengths of both research and foresight...

## Dictionary

Definitions from [Oxford Languages](#) · [Learn more](#)

## research

noun

the systematic investigation into and study of materials and sources in order to establish facts and reach new conclusions.

"the group carries out research in geochemistry"

Similar: [investigation](#) [experimentation](#) [testing](#) [exploration](#) [analysis](#)

## Dictionary

Definitions from [Oxford Languages](#) · [Learn more](#)

## foresight

noun

1. the ability to predict what will happen or be needed in the future.  
"he had the foresight to check that his escape route was clear"

Similar: [forethought](#) [anticipation](#) [planning](#) [forward planning](#) [provision](#)

This report is not intended to 'prove' or 'verify' trend predictions.  
Nor is it intended to represent public opinion at scale.

Rather, by centering the interpretations of consumers,  
this research hopes to bring select trends to life  
- through the nuance and texture of the everyday.



# WHAT WE DID



## WHAT WE DID

## Who we spoke to

Across **6 focus groups** (February 2023), we spoke to **24 people** from all over the UK.

Seeking to speak to people with 'mainstream' experiences, we screened out the nation's very highest and very lowest earners. This excluded anybody with *extreme* socioeconomic experiences, on either end of the spectrum.

For the discussions, we then grouped respondents by age (18-30, 31-45, 46-65) and income (higher vs lower)- to see if these factors might shape conversation.

Each group was mixed gender and mixed ethnicity.

## THE IMPACT

## What this meant

By interpreting trends through the lens of their own experience, these consumers brought an often abstract discussion back down to Earth. In some cases, this meant challenging the trends.

In others, it meant sharing their own examples - making relatable trends feel even more 'real'.



*“Social media related fitness progress”*  
(Jessica, 29, Leeds)

*“Closing of bank branches”*  
(Alex, 43, North West)

*“Social media”*  
(Agnieszka, 43, Manchester)

...but the answers  
were mostly  
observational.

*“Veganism”*  
(Tilly, 18, Birmingham)

*“People going on strike”*  
(Ali, 30, Birmingham)

*“Everything we do will be online”*  
(Melina, 29, London)

First, we asked  
for their unprompted  
views on trends...

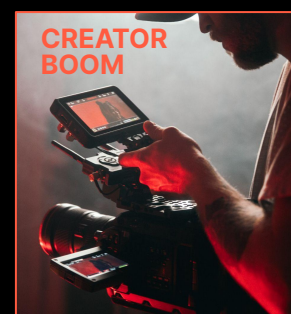
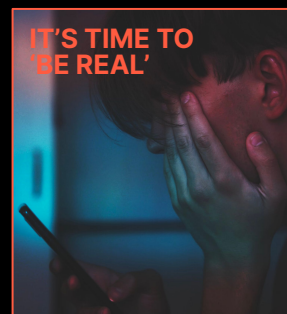
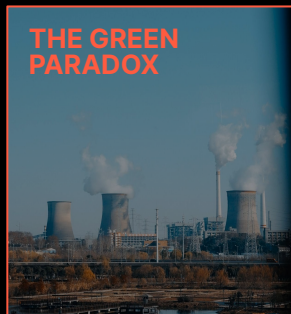
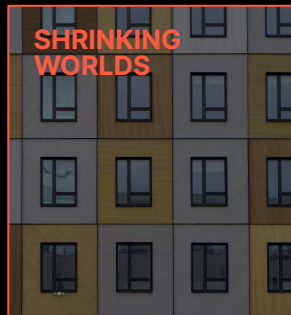
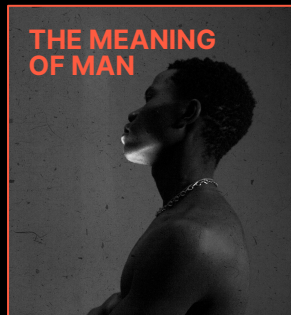
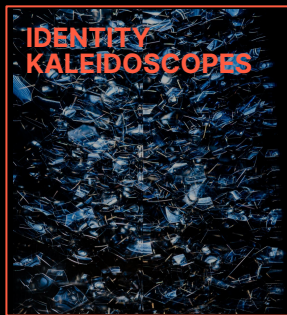




## WHAT WE DID

## So, we put these 'trends' to them...

After reviewing 50 2023 Trend reports published by agencies and brands, we surfaced 10 recurrent narratives to discuss with consumers. The biggest challenges facing brands today - such as the climate and cost of living crises - also informed the themes we chose to focus on.



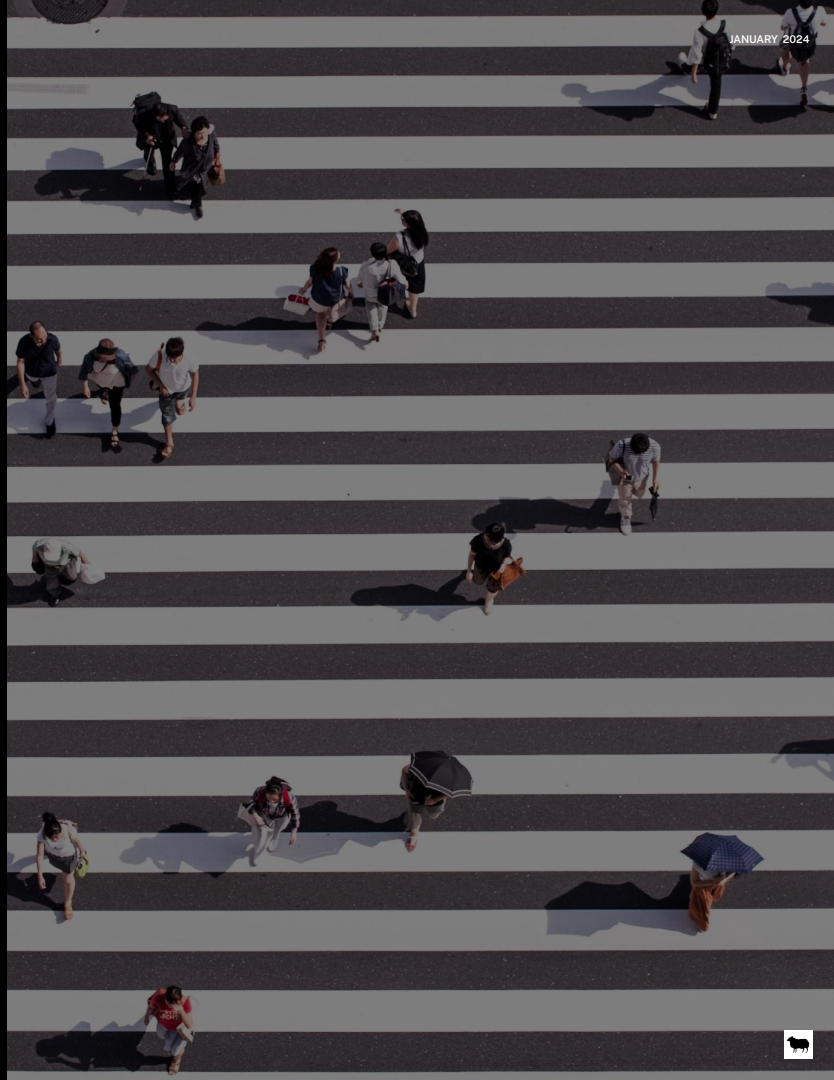
# THE HEADLINES



## KEY FINDINGS

## Demography shaped conversation

- 01 'Young people' were considered to be the agents pushing culture in new directions - for better or for worse
- 02 To differing extents, social class was felt to shape how trends are experienced - intensified by the cost of living crisis
- 03 Gender and race shaped conversations less than age and socio-economic background - but they still showed up



## KEY FINDINGS

# Lived experience mattered just as much

- 01 Mental health experiences were brought up frequently, in deeply personal ways
- 02 Consumer articulations of trends were very different to those seen in foresight reports - with less abstract language



# MAPPING THE TRENDS

MAPPING THE TRENDS

While trends are often discussed in terms of adoption...

Entrenched

Nascent



## MAPPING THE TRENDS

## The consumer response demands different dimensions

In her book, 'From Marginal to Mainstream', Helen Edwards argues that marginal behaviours require the opposing forces of **'intensity'** and **'resistance'**.

While our focus is on consumer interpretation and experience, the same logic applies:

**Instead of just mapping perceived adoption, we needed to map how consumers *feel* about trends.**



## MAPPING THE TRENDS

Some trends were more relatable  
than others...

UNRELATABLE

RELATABLE

For **relatable** trends, respondents quickly referred to lots of personal stories or anecdotes- regardless of whether they 'agreed' with the trend or not. **Unrelatable** trends were seen as abstract or obscure. Respondents struggled to connect them to examples from their own lives.





## MAPPING THE TRENDS

While some divided opinion more than others...

UNIFIED OPINION

DIVIDED OPINION

Trends that **divided** opinion often generated passionate, even heated debates.  
More **unifying** trends generated less disagreement - with respondents generally being 'on the same page' about their interpretations.



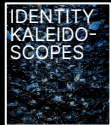


UNIFIED OPINION



UNRELATABLE

RELATABLE



DIVIDED OPINION



# THE DETAIL

# IDENTITY KALEIDOSCOPE

The narrative:

Identity is no longer clear cut.

People are refusing to be put in one box, expressing themselves in increasingly fragmented ways.



“It’s a subject no one wants to talk about, because you don’t want to offend and upset people”

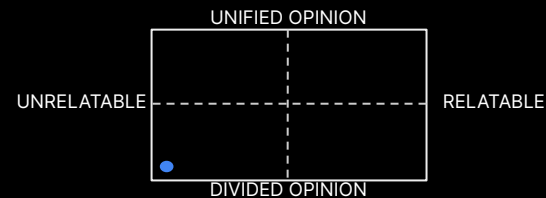
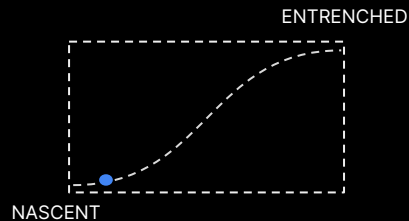
(Sian, 29, Birmingham)



## IDENTITY KALEIDOSCOPIES

## An abstract, divisive topic

For the majority of respondents, 'identity' refers *only* to **sexuality** and **gender identity**. This was felt to be a **fringe** issue, driven by a minority of voices in **news** and **social media**. Regardless of demography, respondents felt **uncomfortable** talking about this topic.



## Sexuality and gender identity only

For the majority of respondents, 'identity' only refers to sexuality and gender. Transgender children and transgender people in sport were both brought up very quickly across multiple groups as points of concern - with respondents reflecting that they'd read about these topics in the **news**.

**"People identifying as different things - it's always in the news and stuff"**

(Olivia, 22, London)

## Unreliable, for all age groups

While most respondents felt that they'd read a lot about 'identity' in the news or on social media, most felt that those topics are completely unreliable when it comes to their own lives. 'Identity' is seen to be something that most people do not grapple with or even think about.

**"...it doesn't affect the majority of people. Most people, I think, know who they are. They're clear about it"**

(Jon, 52, North West)

## Uncomfortable and scary

Despite saying that their everyday lives are untouched by 'identity', all respondents found it highly uncomfortable as a topic. This was either because it makes them angry (a feeling more pronounced among older men), or because they are worried about 'getting it wrong' or upsetting others.

**"You could offend someone by saying 'hi mate, you ok?'"**

(Sian, 29, Birmingham)



## IDENTITY KALEIDOSCOPE

## What's felt to be driving this?

**In the longer term**, respondents felt that the topic of identity (seen only to mean sexuality and gender identity) has had an outsized presence in the news and on social media. This is seen to be driven by a **minority of loud voices** - unrepresentative of the interests of the general public.

It was also felt that the incentive to cut through on social media is a longer term driver of this topic. Respondents of all ages felt that young people deliberately try to be different in pursuit of **attention** and clout.

**More recently, lockdown** was felt to be a time for **solitary reflection**. There was sense that time alone bolstered people's understanding of 'who they are'-encouraging more relaxed attitudes to self-expression.

“It feels like a fad. the younger generation want to identify as more things, to show that they're so much more different from the last person”

(Chelsea, 30, Leeds)



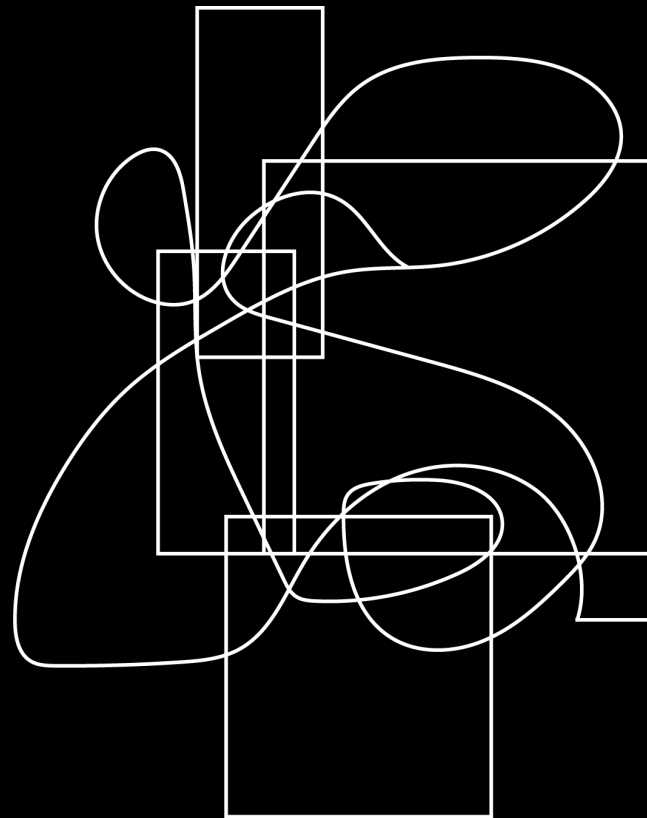
## IDENTITY KALEIDOSCOPE

## Where's this felt to be going?

Overall, respondents felt that society will continue to become **more 'accepting'** of non-traditional self-expression. In reference to men being more open about their feelings, this was welcomed across the board.

However, when it came to sexuality and gender identity *specifically* (topics that dominated conversation) increasingly liberal attitudes were seen to be **dangerous** by most respondents. This anxiety was more pronounced among older men, who vocalised strong concerns that the gender binary and heteronormativity are being threatened. This was described, multiple times, as a **'slippery slope'** - with respondents highlighting transgender athletes and 'gender neutral toilets' as signs of this trajectory.

When it comes to personal experiences of identity fragmentation, the majority of respondents felt that this will **remain a 'fringe issue'** - with most people continuing to feel 'clear' and singular about who they are.





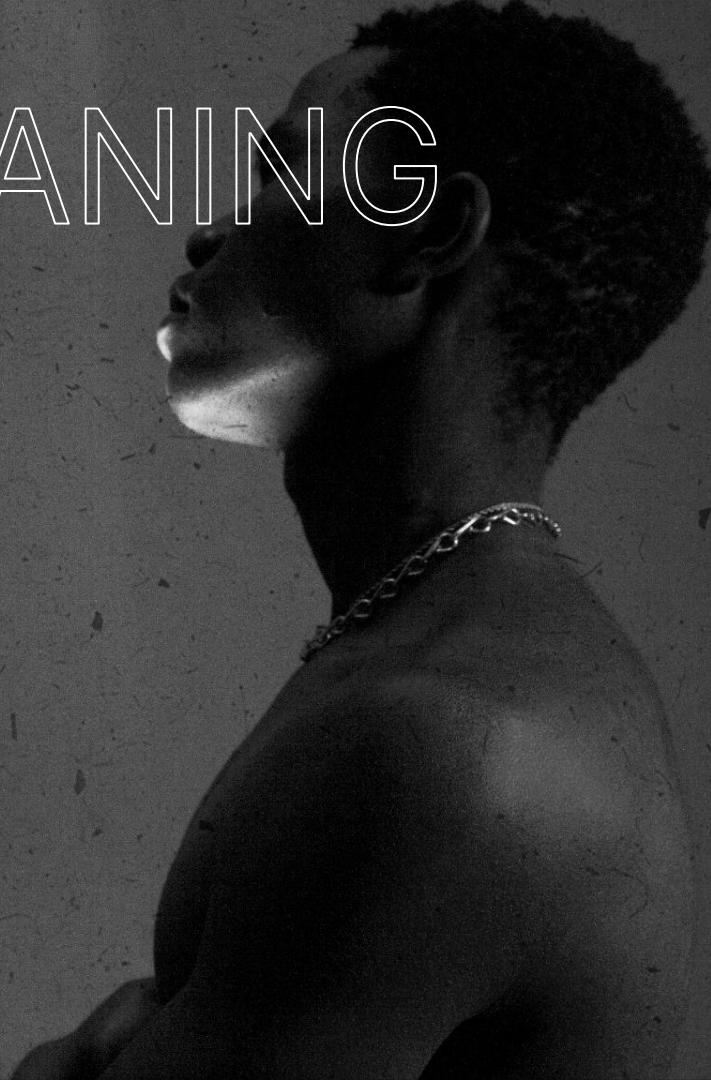
According to trend reports, **identity** is no longer clear cut: people are **refusing** to be put in one box, expressing themselves in increasingly **fragmented ways**.

But for our respondents, **identity** is mostly **immovable** and **rigid**.



# THE MEANING OF MAN

The narrative:  
With perceptions of gender in flux, the meaning of  
masculinity is evolving.



“ The meaning of masculinity is not necessarily evolving.  
It’s becoming more confusing... ”

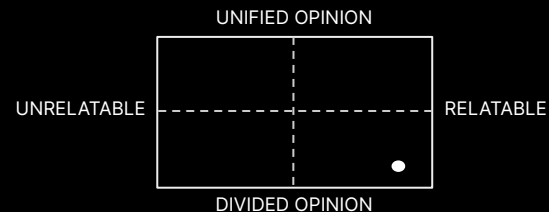
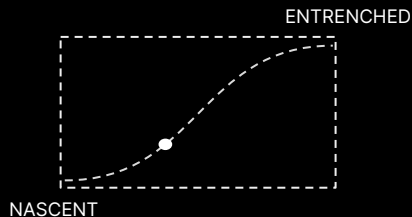
(Marc, 39, Leeds)



## THE MEANING OF MAN

## A deeply personal, divisive topic

There was a strong sense that for most men, the weight of traditional expectation endures.



## A strong sense of gender binary

Across groups, there was a sense that there is an objective, intrinsic essence to 'masculinity'. While most respondents welcomed the expression of different 'types' of masculinity, older men felt strongly that society is on a 'slippery slope' to losing what it means *really* means to be a man.

**"When I say it's going to get worse, I mean that men wearing dresses is going to become the norm"**

(Barry, 65, Manchester)

## The 'provider' burden

There was a strong sense that men have suffered deeply when it comes to their mental health- with respondents welcoming more emotional vulnerability. Several younger men expressed that they feel a heavy pressure to be a 'provider' - which, for them, means never asking for help.

**"I think men grew up with this worry that, 'I have to work...I'm worried I won't be able to get a job'...."**

(Juber, 31, Leeds)

## Polarising media portrayals

While respondents noted more fluid expressions of identity by celebrities, this was felt to be offset by 'toxic' portrayals of men on reality TV shows like Love Island. Several respondents also mentioned the vast influence of Andrew Tate as a sign that masculinity could be going 'the other way'.

**"Love Island men are total dickheads! It gives you a view on men that's not positive at all. It's like they've got no feelings"**

(Jessica, 29, Leeds)



## THE MEANING OF MAN

## What's felt to be driving this?

**In the longer term**, many of the men we spoke to reflected that **feminism**, as well as socio-economic **gains for women** has left them feeling pushed to the side- wondering what their role is supposed to be.

**In the shorter term**, they vocalised a recent **feeling of paradox**. While celebrities like Harry Styles or Sam Smith are being celebrated for non-traditional expressions of masculinity, their own lives are as steeped in traditional expectations as they've ever been - a source of confusion and anxiety.

“Women have wanted a voice for years and eventually they've got it. but now, a lot of what it means to be a man has been forgotten about and pushed to the side...”

(Juber, 31, Leeds)



## THE MEANING OF MAN

## Where's this felt to be going?

While respondents across the board felt that non-traditional presentations of masculinity have been normalised, or even celebrated for **star-studded celebrities**- there was a strong sense that this will not permeate the lives of **'normal' men**.

More fluidity from intangible 'Hollywood' figures- was felt to be offset by a renewed presence of 'hyper-masculinity' on social media. Several respondents mentioned 'dickhead' Love Island 'influencers' and the rise of Andrew Tate as signs that masculinity could be going in the 'other direction'.

Conversely, respondents felt that 'normal' men continue to feel an expectation to 'man up' - which means, for our respondents, never letting on if you're struggling. All respondents felt that men have suffered deeply as a result, bringing up the topic of suicide among men.

While there was a sense that this pressure isn't going anywhere, respondents noted that **men's mental health** is being spoken about much more - a welcome, urgent trend.



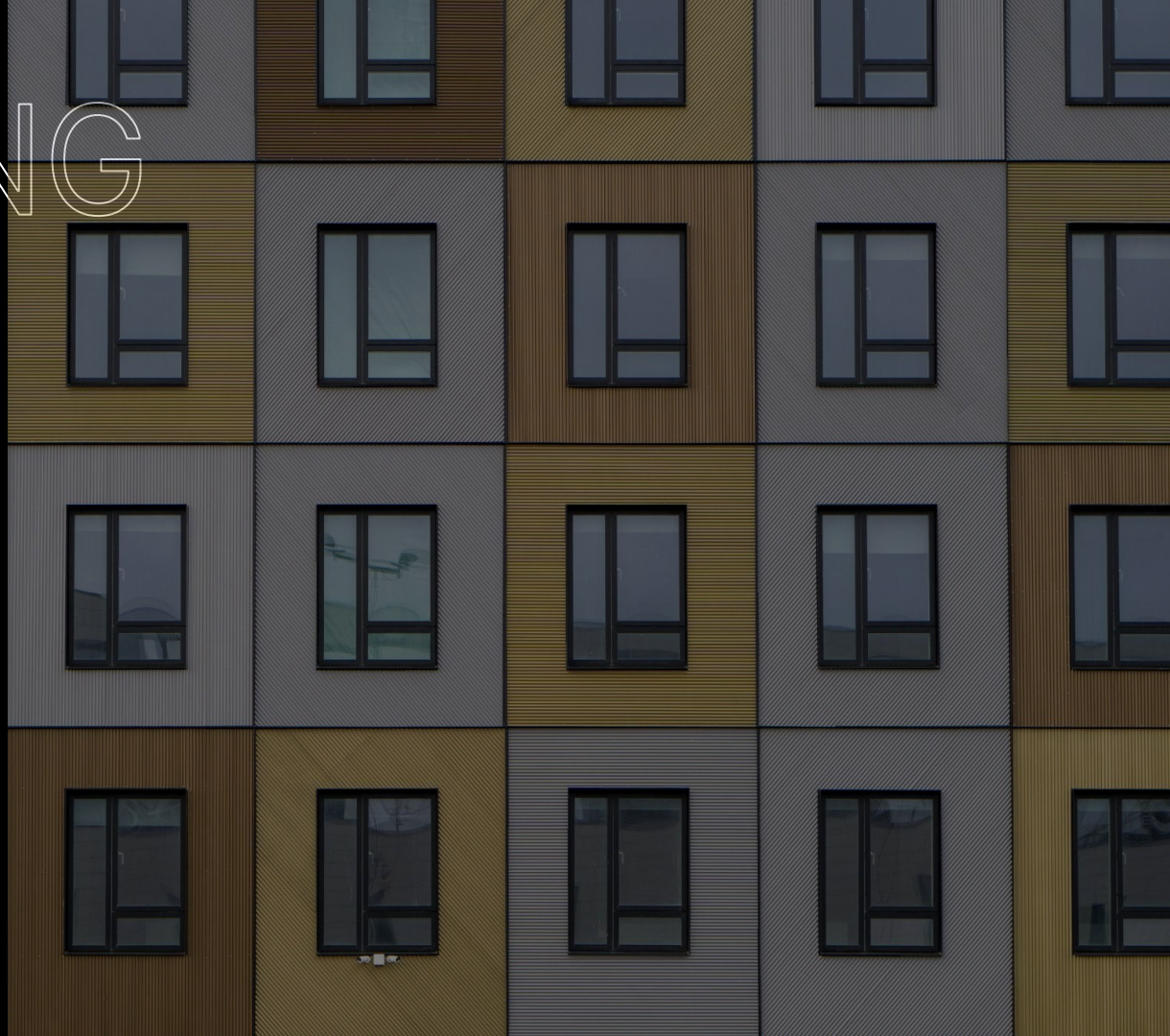
According to trend reports: with perceptions of gender in flux, the meaning of masculinity is evolving.

But our respondents wouldn't say **masculinity** is evolving.  
It's just getting more **confusing**.



# SHRINKING WORLDS

The narrative:  
The world feels volatile and dangerous. So people are  
seeking the 'safety' of what they know.





“ That’s what i’ve seen working with young people in the job center...any little thing, they don’t know how to handle it! ”

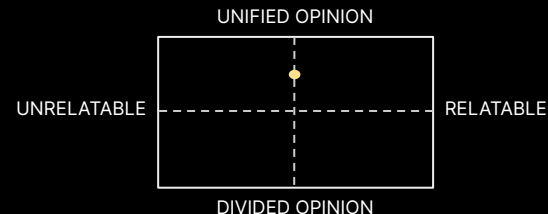
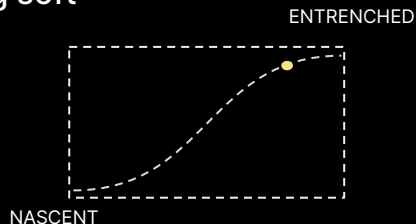
(Agnieszka, 43, Manchester)



## SHRINKING WORLDS

## For older respondents, the 'real' danger is getting soft

Across the board, respondents felt that the world is no more dangerous than it's ever been. Narratives of volatility and crises are seen to be news and social media driven.



### The comfort generation

For respondents of all ages, there was a strong sense that young people today prioritise being **comfortable** above taking risks- making them less capable of navigating life's challenges. Older respondents compared this to their own experience of youth - which was all about taking risks and getting stuck in.

**"My son's 13. He doesn't want to go outside, he wants to sit on his PS5. When I was that age, we were going out doing some good old fashioned vandalism!"**

(Marc, 39, Leeds)

### Chronically at home

For older respondents, the youth of today are chronically at home - plugged into their devices. A post-lockdown culture of **working from home** is seen to have legitimised this existing tendency - further stunting the growth of a generation already lacking grit, resilience and work ethic.

**"People will tell me that they're living in their own little bubble when working from home...kind of like, zoning off"**

(Juber, 31, Leeds)

### If it bleeds, it leads

Respondents felt that the news and social media are full of horror stories - leading to unnecessary anxiety. They felt that this was heightened by the pandemic, noting friends who are still worried about getting back out there.

**"It comes down to what sells. The negative stuff does sell, the companies, the newspapers, the social media..."**

(Agnieszka, 43, Manchester)

## SHRINKING WORLDS

## What's felt to be driving this?

Respondents felt that **news media** has *always* exaggerated how dangerous the world is. **Social media** was felt to have exacerbated this existing tendency - with journalists and non-journalists alike hungry for clicks.

Older respondents felt that for a long time, **young people** have become less and less resilient - blaming this on how much time they spend at home, plugged into their devices.

In the shorter term, it was felt that **lockdown** made people more insular - a trend that is felt to have outlasted 'stay home' mandates. It was felt that this is more pronounced for young people - causing them to miss out on the life lessons that come with getting 'stuck in' and taking risks at formative stages of their lives.

“A lot of stuff gets sensationalised, like... *‘the most dangerous cities in the UK’*...there’s a lot of that flying around in the social media space, painting this gruesome picture...”

(Juber, 31, Leeds)



## SHRINKING WORLDS

## Where's this felt to be going?

Overall, there was a strong sense of stasis when it comes to how 'dangerous' or 'volatile' the world is. For our respondents, **the world is dangerous. It always has been. And it always will be.**

Respondents felt, however, that narratives of crises have been heightened in recent years - driven by news and social media actors hungry for clicks and cash. Young people, plugged into their devices, are seen to have been most affected by this - bolstering what was felt to be an existing tendency to put being comfortable ahead of taking risks.

It was felt that the pandemic has made this exaggerated sense of crisis much worse - with anxieties about the world 'out there' further enabled by the continuation of **home-working culture.**

Older respondents felt that young people have been particularly affected by this insularity, having spent two formative years of their life at home- deprived of the learnings that come with getting 'stuck in'. Our respondents felt that this a trend that will **only get worse** - leading to **a generation of 'softies' - unable to handle life's challenges.**



According to trend reports: the world feels volatile and dangerous. so people are seeking the safety of what they know.

The world is **dangerous**, but it always has been.  
The real danger is getting **soft**.



# WEB 3 & THE METAVERSE

The background of the slide is a dark, almost black, space filled with intricate, glowing digital structures. These structures resemble fiber optic cables or neural networks, with numerous thin, bright blue and green lines radiating from central points, creating a sense of depth and complexity. The overall aesthetic is futuristic and high-tech.

## The narrative:

As the internet evolves towards its next iteration, people are scrambling to explore what it will mean for them.

“ I just think it’s something being pushed by nerds in san francisco ”

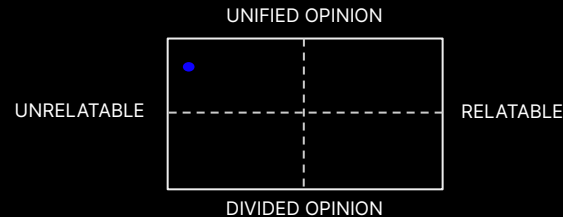
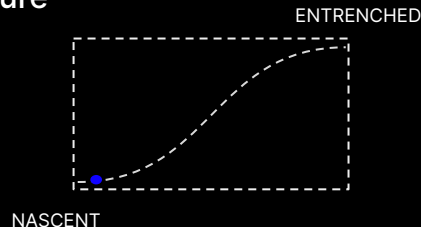
(Stewart, 34, London)



## WEB 3 &amp; THE METAVERSE

## Intangible in the present, unappealing in the future

Especially in the wake of the pandemic, respondents appear to hate the idea of spending time in virtual worlds.



## Virtual worlds are nothing new

For our respondents, 'The Metaverse' means virtual worlds (discussion of Web3 technology was limited to a passing mention of NFTs). Virtual worlds were seen to be nothing new - with respondents arguing that existing capabilities have just been 'rebranded' to make money.

**"We already do what The Metaverse does. You ever been in a chat room? Ever played Animal Crossing?....they've just put a new name on it now and they're monetizing it"**

(Adam, 40, Birmingham)

## It'll never beat the 'real thing'

After years at home, respondents felt a strong, renewed passion for 'real life' adventure. Several respondents mused that going on holiday is a sensory feast. It's about the first sip of a cold beer, or feeling the sun on your skin. As Lee from Leeds put it, *'you can't get a tan in The Metaverse'*.

**"Karl Pilkington said 'i've seen safari, i've seen lions, i've seen tigers, i've seen giraffes!' and Ricky asks him, 'where'd you see that?!...on BBC Four!!'**

(Sharif, 48, Leeds)

## People want hugs

All respondents felt strongly that 'real' connection is an intrinsically human need - with zoom quizzes over lockdown failing to engender feelings of closeness. Across the board, there was a strong concern that a metaversal future would make people feel even more disconnected.

**"We were locked up, confined in our houses for months, years - with people on computers. Now you want to make this a regular thing?!"**

(Simone, 42, London)





## WEB 3 &amp; THE METAVERSE

## What's felt to be driving this?

Respondents across the board felt that The Metaverse is being pushed on them by big tech - particularly by Meta's Mark Zuckerberg. It was felt that this was ultimately being driven by an appetite for **money** - not by a desire to serve consumers.

It was also felt that proponents of The Metaverse are attempting to sell it because they're **out of touch** with reality - recalling a classic lesson: *'just because you can, doesn't mean you should'*.

Respondents also noted that **lockdown** was a huge commercial opportunity for social media companies, including Meta - noting this as a driver of Metaverse investment.

“It's being led by big corporate, corporations, you know. you've got Meta, trying to lead the way on it. it just feels a little bit egregious and greedy...a bit detached”

(Adam, 40, Birmingham)



## WEB 3 &amp; THE METAVERSE

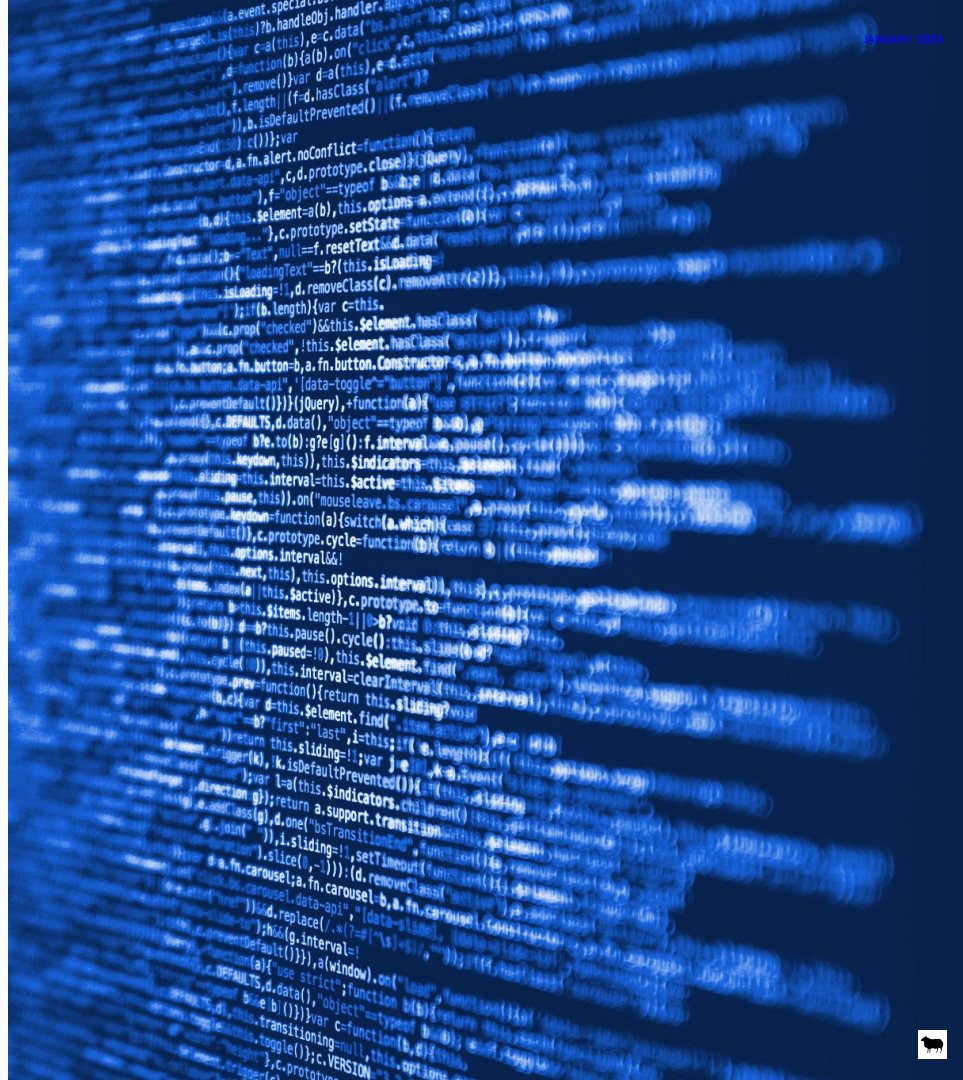
## Where's this felt to be going?

While most respondents felt that 'The Metaverse' is generally a bad idea for society, this view was more intense among wealthier respondents. Wealthier groups were more passionate in their view that 'The Metaverse' is being promoted to serve the interests of 'big tech' - not everyday consumers.

The consensus was that virtual worlds will never replace the feelings of connection engendered by 'real life' interactions - a view that was felt to have been bolstered by experiences of isolation over the pandemic. There was also strong concern that if virtual worlds became the status quo, older people would be 'shut out' - something that they felt is already happening due to the decline of the high street, especially with banking.

Respondents from lower socioeconomic backgrounds appeared to be more open minded and creative when discussing potential use cases for virtual worlds - such as taking an immersive tour of a hotel before you book it, or visualising a 'new look' for your home before committing to it.

But when it comes to 'The Metaverse' as the 'next iteration of the internet', there was a strong sense that this is **a potential future that consumers never asked for**. As Adam, 40, from Birmingham put it - *'I hope it falls on its ass'*.



According to trend reports: as the internet evolves towards its next iteration, people are scrambling to explore what it will mean for them.

But for our respondents, the metaverse is deeply **unappealing** beyond limited use cases - a **potential** future they never asked for.



# COMMUNITY POWER

The narrative:

Rejecting individualism, people are prioritising the 'greater good' - operating more as 'we', rather than 'me'.



“I wish it was like how we were in lockdown, like...caring for people”

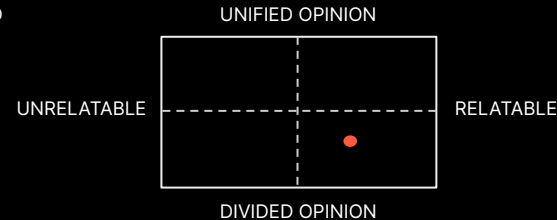
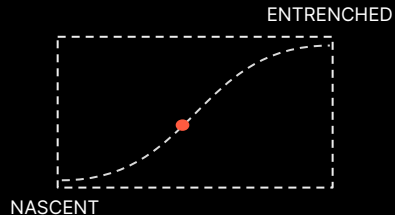
(Tilly, 18, Birmingham)



## COMMUNITY POWER

## For most, 'solidarity' has gone out the window

For those that don't have skin in the game, the community power of lockdown hasn't lasted.



## Lockdown was an anomaly

There was a consensus that the isolation of lockdown led to a reprioritization of local community - brought to life visually by 'clap for carers'. But across the board, this was seen to have been a blip - with people soon reverting back to the status quo of looking out for number one.

**"It (lockdown) focused the mind for a lot of people"**  
(Melina, 29, London)

## Social media as a tool for change

Across the board, respondents felt that social media has been a tool for change - allowing people to rally around big issues like racism. 2020 felt like an inflection point, with the murder of George Floyd galvanising many of our respondents (and the people in their lives) to speak out on social media.

**"Following the death of George Floyd, I was quite vocal on social media...I questioned a lot of family members on Facebook"**  
(Chelsea, 30, Leeds)

## Individual selfishness

Despite being framed as 'activists', respondents of all ages felt that young people are extremely selfish on an interpersonal level - prioritising their own comfort over helping others.

**"I think for more and more people, it's all about 'me, me, me!'...there's no togetherness anymore"**  
(Sharif, 48, Leeds)



## COMMUNITY POWER

## What's felt to be driving this?

In the longer term, respondents noted how **social media** has enabled people to rally, or organise around macro issues more effectively.

It was felt that **2020** was an inflection point for 'solidarity'. Lockdowns were felt to have renewed a sense of community at a local level- embodied by 'clap for carers'. Further, the murder of George Floyd was noted as a galvanising moment - with several respondents describing how they took to social media to take an anti-racist stand.

But coming out of the pandemic, it was felt that people are reverting back to individualism - compounded by the **cost of living crisis**.

“I think this trend was really key during lockdown, like clap for the NHS and everything...but coming out of it all now and going into the economic crisis, we have come back to looking after ourselves again, before other people”

(Tilly, 18, Birmingham)



## COMMUNITY POWER

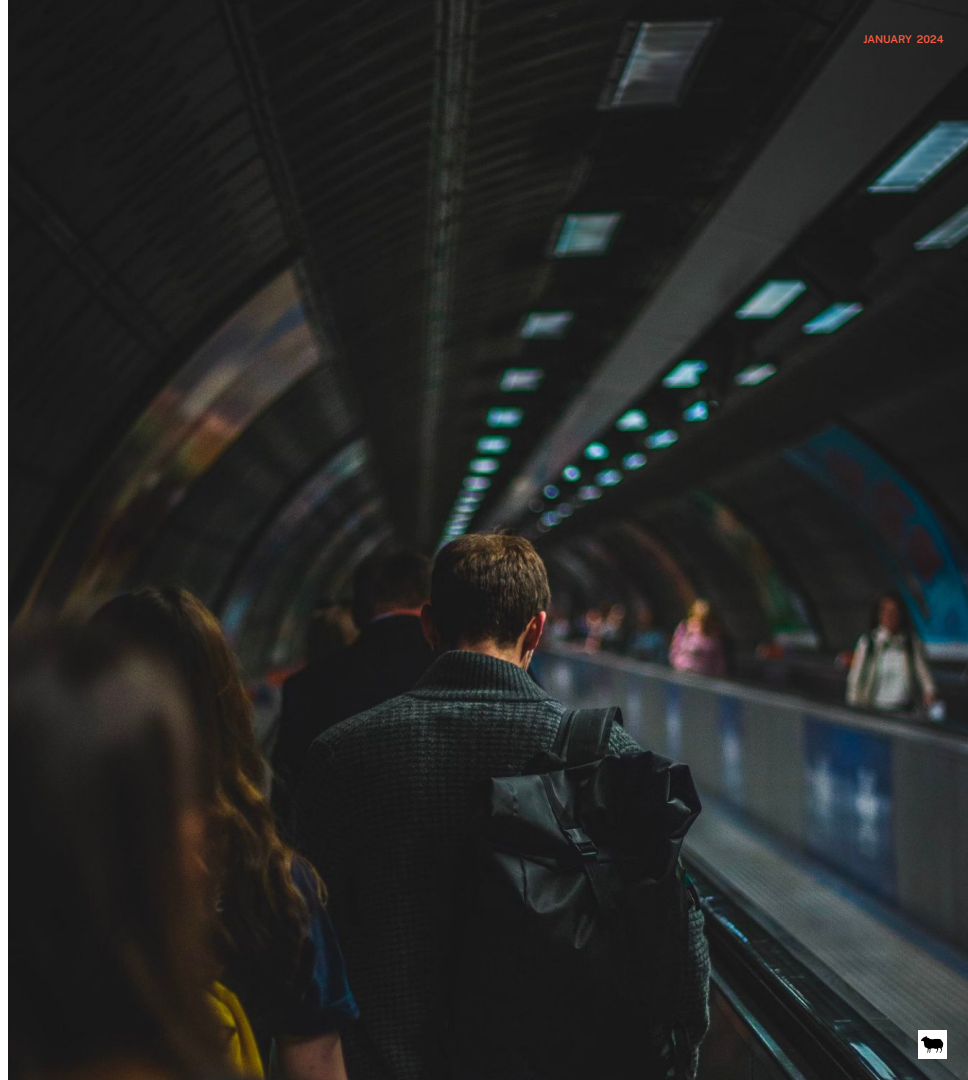
## Where's this felt to be going?

Despite using social media to broadcast their 'commitment' to macro issues, there was a consensus that young people have become more selfish on a personal, individual level - prioritising their own comfort more than ever.

2020 was seen to be an inflection point for 'solidarity' - with several respondents reflecting that the murder of George Floyd prompted them to take a stand on social media - using their profiles to promote anti-racism among their social circles. There was also a sense that lockdown engendered a renewed sense of community- embodied by people coming out on their doorsteps to clap for NHS key workers.

But after multiple years of lockdown, young people are seen to be compromising for no one - adopting a tunnel-vision '**me mentality**' in their personal and professional lives. This is felt to have been further catalysed by the rising **cost of living** - forcing young people to be even more demanding in order to achieve a comfortable life. With prices continuing to rise, there's a sense that this will only get worse.

For our respondents, young people are a fickle crowd. **For those that don't have skin in the game, 'solidarity' has gone out the window.**





According to trend reports: people are prioritising the 'greater good' - operating more as 'we' rather than 'me'.

But for our respondents, despite the momentum of **big causes** - people are getting more **selfish** than ever.



A close-up photograph of a human hand held palm up, with fingers slightly spread. The hand is the central focus, set against a dark, blurred background. The lighting is soft, highlighting the texture of the skin and the lines on the palm. The overall mood is one of openness and vulnerability.

# SELF- KINDNESS

The narrative:

More than ever, people are seeking out ways to 'care'  
for themselves - prioritising feeling at peace.

“...There’s not enough hours in the day!  
If you’re a normal person, who works”

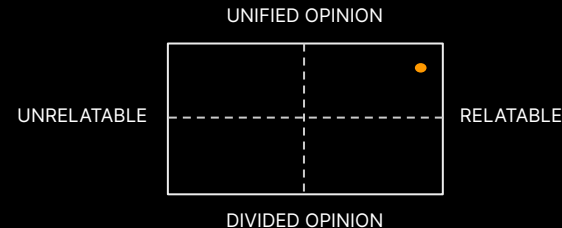
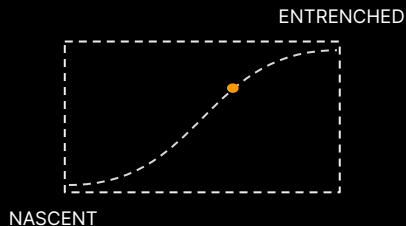
(Jessica, 29, Leeds)



## SELF - KINDNESS

## A welcome, but unequally felt trend

Not everybody is able to access self-kindness in the same way - it's strongly shaped by wealth and occupation.



## A familiar, positive trend

All respondents felt that self-kindness has been on the rise for a while now, but that the pandemic accelerated it. While it was noted that some people take self-kindness too far, to the point of selfishness- it was generally felt that this is a net positive trend for society.

**"It's going to be more promoted and mainstream"**

(Tilly, 18, Birmingham)

## Workplaces are behind on this

It was felt that the workplace is the next frontier for self-kindness to become normalised and encouraged. It was felt that arbitrary measures of 'professionalism' are barriers to wellbeing, with younger respondents being far more staunch about the boundaries that they assert at work.

**"I'm worried that in certain jobs, if I was to take a mental health day, that it would be seen as unprofessional"**

(Melina, 29, London)

## Not everyone experiences it equally

There was a sense that access to self-kindness is shaped by lifestyle - dictated by how much money you have, or whether you have the option to work from home. Social media influencers were called out for promoting self-care routines that are totally unrealistic for working people.

**"I think there is a barrier...especially if you're working full time and you're not getting in 'til late"**

(Jessica, 29, Leeds)

## SELF - KINDNESS

## What's felt to be driving this?

**Social media** was seen to be a big factor - for better and for worse.

Younger respondents in particular reflected on the intensity of social media **hate** levelled against celebrities or influencers - with **high profile suicides** bringing this issue into acute focus.

Conversely, social media influencers were felt to have played a big role in popularising **'self-care' content**. While their content is seen to be unrealistic for 'normal' people - its limitations are felt to be offset by the benefits of the trend towards self-kindness overall.

In the shorter term, many felt that the **pandemic** accelerated the self-kindness trend. For many, furlough meant lots of time to reflect. For others, anxiety about job security meant brutal overworking. But both were felt to have resulted in a reappraisal of what matters.

Now, there is a strong feeling that the **ability to work from home** is a privilege - shaping access to 'self-kindness', whatever that looks like.

“I think suicide and celebrities have got a link to it. there's been quite a lot of suicides recently with famous people. it's been all over social media to 'be kind'”

(Jessica, 29, Leeds)



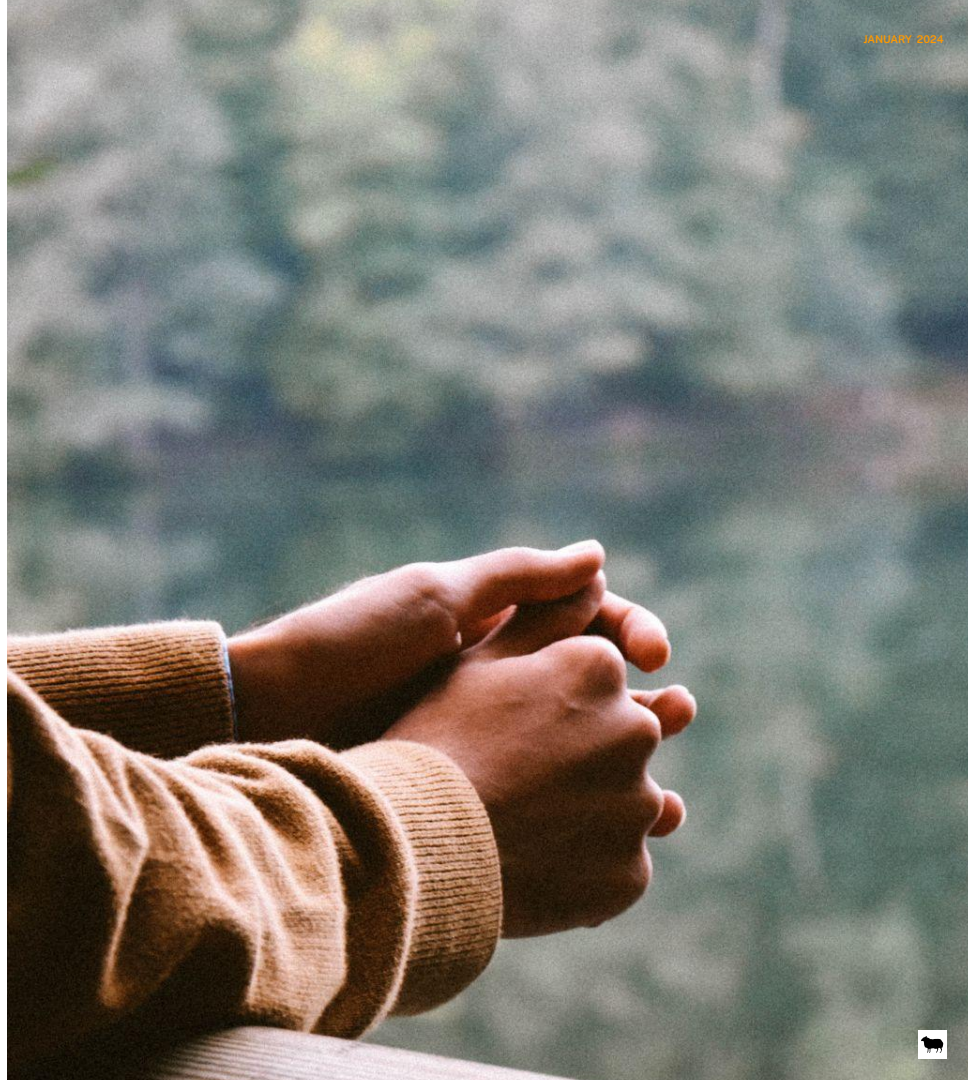
## SELF - KINDNESS

## Where's this felt to be going?

The normalisation and celebration of 'self-kindness' is seen to be **on the ascent**. For our respondents, it isn't going anywhere.

While prioritizing wellbeing is seen to be normalised and even celebrated in the personal arena, perceptions of what constitutes '**professionalism**' is still seen as a barrier to overall well-being. Respondents of all ages felt this to be the case, but it is notable that younger respondents were much stauncher in their assertion of the boundaries they implement at work, in order to protect their wellbeing. As Melina, 29, from London put it: **"...if I don't feel comfortable, i'll leave. If anything at all is compromised, especially my mental health"**.

Across the board, respondents felt that workplaces will be forced to make the wellbeing of their employees a paramount priority. For our respondents, this could take many forms - from normalising being open about having a 'mental health day', to allowing for more flexible working patterns, to being more accommodating to parents.



According to trend reports: more than ever, people are seeking out ways to 'care' for themselves - prioritising feeling at peace.

But for our respondents, 'self-kindness' isn't felt equally. Instead, it's bringing inequality to light in new ways.



# GREEN PARADOX

The narrative:  
Sustainability is more important than ever  
for consumers.





“...you can't go and save the world if  
there's no food in your stomach”

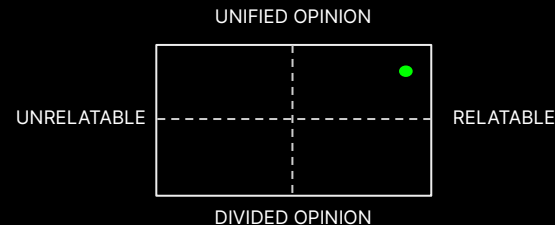
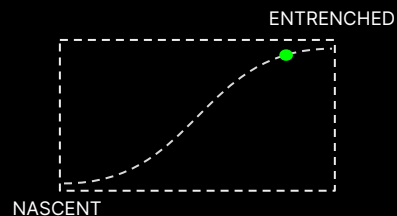
(Ali, 30, Birmingham)



## GREEN PARADOX

## Consumers feel powerless to affect change

Respondents feel a strong sense of fatigue and cynicism when it comes to sustainability.



## Watching the world burn

Most consumers conveyed an acute awareness that climate change is a **crisis** - compounded by news coverage of disasters.

**"We saw raging fires...killing billions of animals...But no one's doing anything about it...apart from sticking stuff in the blue bin"**

(Barry, 65, Manchester)

## But it still feels abstract

Despite seeing disaster on the news, respondents reflected that their own lives are untouched by climate change. They know there's a crisis, but they don't *feel* it.

**"We should all be tearing our hair out, doing everything we can. But it's a bit, like...academic?"**

(Marc, 39, Leeds)

## Efforts feel like a drop in the ocean

The scale of the damage feels so big and irreversible, that making an effort to do the 'right thing' feels futile. The impact of sustainable choices, like recycling, is not visible to consumers - driving complacency.

**"...you don't hear about change - you just hear negative things... so when you try to do something positive, you don't see anything in return... so you're just like, well - it's not gonna make a difference"**

(Ali, 30, Birmingham)

## GREEN PARADOX

## What's felt to be driving this?

The say-do gap was felt to be driven by a strong **sense of powerlessness** to affect change.

Respondents felt that that **'big business' caused this mess** - so they should be responsible for cleaning it up. While 'big business' and governments were seen to be the only actors with any *real* power to make a difference, they were called out for inertia and complacency.

It wasn't just CEOs and politicians that were framed as detached from the lives of consumers - young climate activist Greta Thunberg was called out as **'preachy'**.

The consumer journey was also seen as a driver of the say-do gap: starting with advertising. Advertisers were blamed for both encouraging unnecessary consumption and **'greenwashing'** - making it harder for consumers to do the 'right thing'. Further down the funnel, many felt that shopping experiences are full of barriers to sustainable choices. Some respondents reflected that there should be incentives for doing the 'right thing'.

With greener choices already felt to be costly and inconvenient, respondents felt that the **cost of living crisis** is the most recent driver of the say-do gap.

“When you’ve got these big polluters, does it really make a difference if I go on holiday or not?”

(Jon, 52, North West)



## GREEN PARADOX

## Where's this felt to be going?

The sustainability say-do gap was seen to be an **entrenched**, familiar experience - with respondents citing multiple examples from their day-to-day lives.

When asked about their personal behaviours, respondents across the board expressed a strong sense of fatigue. It was felt that living more sustainably takes more effort than it's worth - with small (but costly and inconvenient) efforts seeming like a drop in the ocean compared to the scale of the crisis. As one respondent put it, ***"...people will continue until they see actions from people at the top"***.

As the **cost of living** continues to rise, respondents felt that this sense of exhaustion will **only get worse** - as sustainability falls down the list of consumer priorities.



According to trend reports: sustainability is more important than ever for consumers - driving discerning consumption.

Our respondents affirmed that a sustainability 'say-do gap' is entrenched - driven by fatigue, cynicism, or simply not caring.



# VALUE REDEFINED

The narrative:

Whether it be investing in a stock, or buying a new coat - the meaning of 'value' has broadened to be about more than just price.



“ ..it’s like the drink prime...people were buying it because of the celebrity who’s promoting it and what they stand for ”

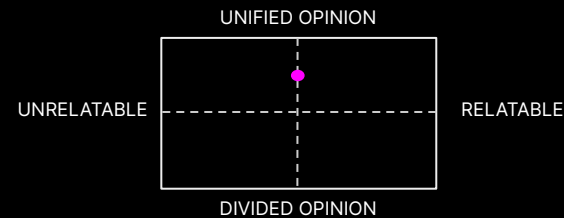
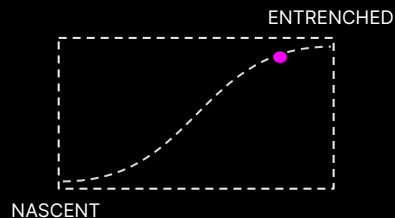
(Chelsea, 30, Leeds)



## VALUE REDEFINED

## Value has always been subjective

But the cost of living crisis has forced it to become a central priority, particularly for respondents from lower socio-economic backgrounds.



## Stigmatised 'value'

Respondents reflected that 'own-brand' value ranges have been stigmatised in the past - citing embarrassment, or social pressure as a reason for missing out on cheaper products.

**"ASDA's essential brand, the bright yellow packaging...over social media, I did see the negativity"**

*(Sian, 29, Birmingham)*

## Shifting priorities

For many respondents, the sharp rise in prices forced a reassessment of what 'value' means to them - leading them to try out 'own-brand' products.

**"...due to the cost of living, I tried some myself...it actually doesn't taste that much different from the expensive brands!"**

*(Ali, 30, Birmingham)*

## Savvy, not stingy

The attitudinal shift described by respondents has been underscored in digital culture - with TikTok videos celebrating value shopping through yellow label hauls.

**"People are actually showing off about spending less nowadays"** *(Olivia, 22, London)*





## VALUE REDEFINED

## What's felt to be driving this

**Socio-economic background** appeared to influence what respondents felt shapes the meaning of 'value'.

Wealthier respondents discussed the macro trend of **ESG** investing - highlighting huge financial players like JP Morgan as drivers of value metrics beyond profit. They also reflected on an increasing awareness of the climate crisis as a driver of more sustainable shopping choices at the point of purchase, reflecting on times that they've spent a little more to do the 'right thing'.

But despite this, while respondents recognised that 'value' is a stretchy, subjective word - it's 'evolving meaning' is not felt by consumers on a day-to-day basis. Putting macro trends like ESG aside, **'value' remains code for 'low cost' to most.**

Across the board, but particularly for respondents from lower socioeconomic backgrounds - the importance of price in assessments of 'value' is seen to have been compounded by the **cost of living crisis.**

“I used to spend no more than say, £10 a week...now, I come out of Sainsbury's having spent £60!!”

(Sarah, 42, Birmingham)



## VALUE REDEFINED

## Where's this felt to be going?


For the majority of respondents, the meaning of 'value' is **always going to be subjective.**

While wealthier groups mentioned ESG investing and the increasing urgency of the climate crisis as here to stay, there was a strong consensus that **price will remain paramount for consumers.**

While the cost of living was noted as a critical driver by all, this theme was far more pronounced for respondents from lower socio-economic backgrounds. It was felt that seeking out lower costs is now being celebrated as 'savvy', rather than stigmatised as 'skimping' - with consumers taking to social media to shout about their 'yellow label' savings.

For our respondents, price is only going to rise in importance. But it doesn't have to mean 'stripping back' or 'losing out' - it's increasingly being expressed as 'savvy wins'.





According to trend reports: the meaning of 'value' has broadened to be about more than just price.

but for our respondents, the cost of living crisis means that value is more about price than ever.

# IT'S TIME TO BE 'REAL'

The narrative:

People are rejecting the performance of 'perfection'.  
Instead, openness and vulnerability are valued as  
authentic.



“It is kind of like the new sort of currency-getting followers for being seen as ‘real’...”

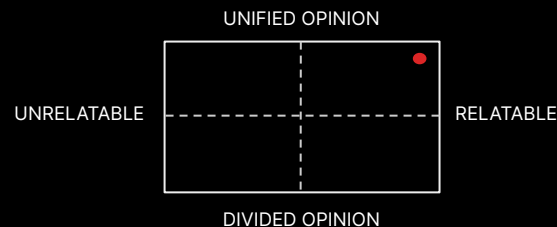
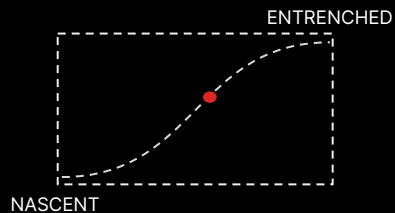
(Stewart, 34, London)



## IT'S TIME TO BE 'REAL'

## 'Realness' has become a currency on social media

For the majority of respondents, being more open and vulnerable about mental health was a highly familiar, welcome trend. Conversely, it was noted that on social media, 'realness' is now being performed for clout - giving rise to a new social pressure.



### Historical pressure to be 'perfect'

Respondents of all ages noted the enduring, ongoing pressure to be 'perfect'- driven by celebrities and the media. But there was a strong sense that social media filters have intensified this pressure in new, toxic ways - driving concern for young women in particular.

**"My friends daughter says she will never, ever take a picture without a filter...it's sad!"**

(Dee, 54, Leeds)

### The pandemic

More time spent at home was felt to be a catalyst for more relaxed attitudes to dress and style. Respondents described not wearing make up for the first time in years, or swapping smart trousers for comfortable tracksuit bottoms - with more 'chilled' attitudes continuing after lockdown.

**"More so since covid... people are posting photos without make up on. It was never a thing they would have dared to do before lockdown"**

(Katrina, 31, North West)

### 'Realness' as currency

Respondents noted that social media feeds have been saturated by images of Kardashian-esque, 'snatched' faces - with filters like '**bold glamour**' leading to a sea of sameness. This is seen to have given rise to another tension: the performance of 'realness' for social clout.

**"People are gaining followers on social media for being 'real', or for expressing themselves...voicing their frustration and opening up, being vulnerable to society"**

(Stewart, 34, London)

## IT'S TIME TO BE 'REAL'

## What's felt to be driving this?

**In the longer term**, respondents across the board felt that **showing vulnerability is less stigmatised** than it used to be - reflecting that the 'stiff upper lip' is from a bygone era.

**In the medium term**, pushback against 'perfection' is felt to have been further encouraged by the **pandemic**. For respondents across the board, spending time at home gave rise to what they saw to be more 'authentic' self-expression.

But despite this cultural shift, **social media** is seen to have catalysed new pressures to be 'perfect' - from the use of **filters** to **performed 'realness'**.

“How can you be yourself,  
or allow yourself to be  
vulnerable, when people  
are wanting to look like  
a Kardashian?”

(Adam, 40, Birmingham)



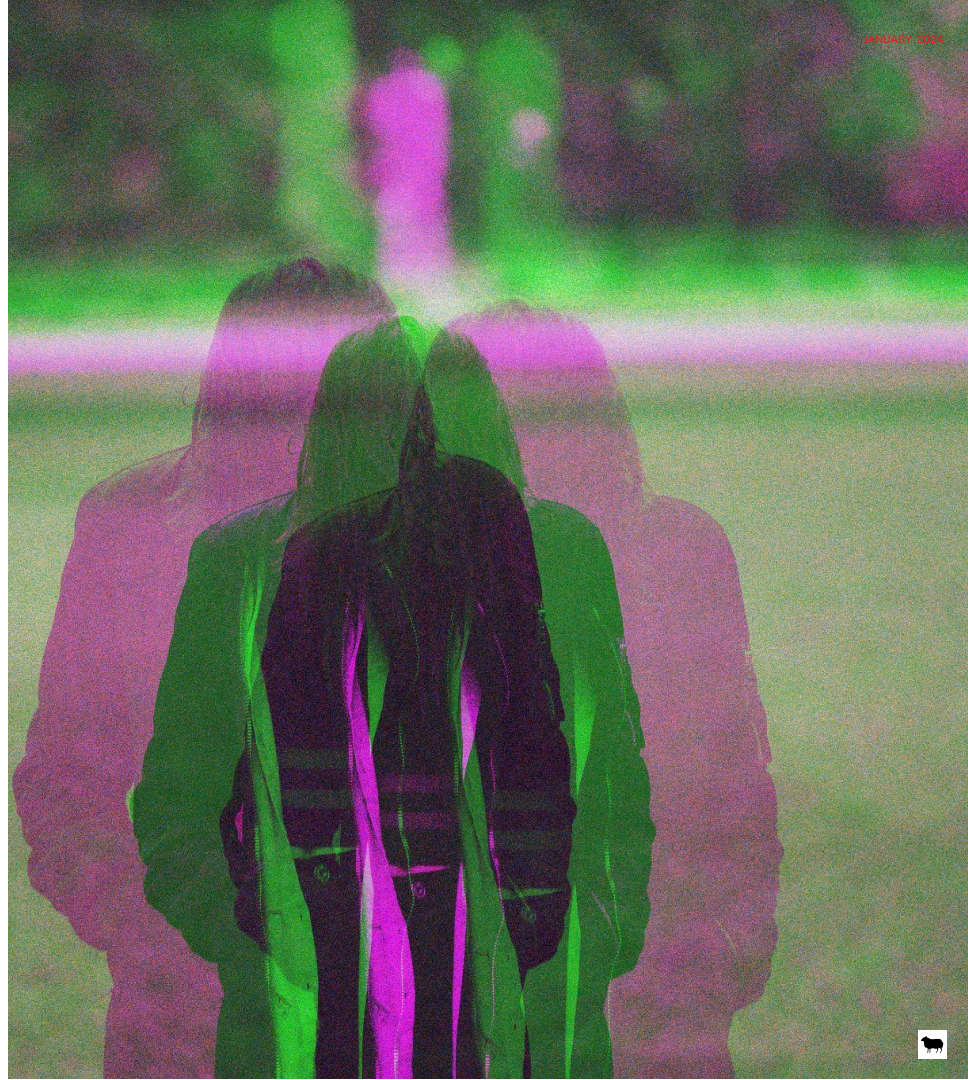
IT'S TIME TO BE 'REAL'

## Where's this felt to be going?

Respondents felt that a broad cultural emphasis to 'be yourself' is being offset by an even bigger, **constantly evolving** pressure to be 'perfect'.

While respondents recalled waify models emblazoned across glossy magazines in the 90s, they were clear that unrealistic aesthetic standards have not gone away. Instead, they're felt to have been **supercharged by social media**- manifesting in new and dangerous ways.

Whether it be using filters to look like a Kardashian, or curating the appearance of messy, blurry nonchalance through Instagram photo dumps - respondents felt that **the pressure to conform is not only continuing- it's getting worse.**





According to trend reports: people are rejecting the performance of 'perfection'. Instead, openness and vulnerability are valued as authentic.

But for our respondents, there's a new pressure to perform 'realness' - one that's rooted in appearance.



# CREATOR BOOM

The narrative:

Thanks to social media, anybody can be a creator - shaking up who influences culture.



“My friend living in LA said any time you meet someone, it’s like - *‘how many followers do you have?’*...”

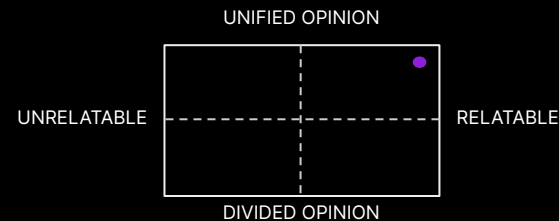
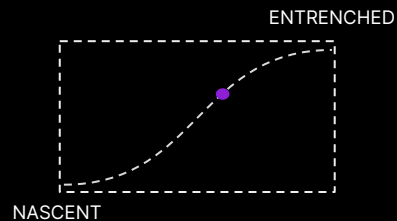
(Melina, 29, London)



## CREATOR BOOM

## Democratising, but dangerous

While respondents felt excited by being able to access to a diversity of perspectives, they're worried that 'influencer' culture will go too far.



## New niches

Younger respondents felt that the ascendancy of TikTok is behind an explosion of niche creators - encouraged by a hyper-personalised algorithm.

**"It's all just about algorithms really... my TikTok is quite different to my friends TikTok. Mine's like, food or clothes. My boyfriend's is just football..."**

(Tilly, 18, Birmingham)

## Attempts to go viral

Respondents felt that the monetary incentive to go viral is driving inauthentic behaviour.

**"There's a girl who lives near me, who's got like a million subscribers on TikTok. She earns quite a lot of money from it. But the stuff she posts...it's just fake really, she lies about things"**

(Tilly, 18, Birmingham)

## Influencing as a profession

Respondents were concerned that influencing could become considered a 'serious' profession, with some speculating on the emergence of university degrees on the topic. This was seen to undermine 'real' jobs.

**"What's so scary, is if you ask a child 'what do you wanna be when you're older?', it's all - 'I wanna be an influencer!...It's scary'"**

(Melina, 29, London)



## CREATOR BOOM

## What's felt to be driving this?

Younger respondents cited an **appetite for reliable voices** - explaining that product recommendations from people *like them* feel more authentic.

Older respondents from lower socioeconomic backgrounds described how a **distrust of traditional news media** outlets has driven them to seek alternative perspectives through social media.

Across the board, there was an overarching consensus that creators, or influencers are increasingly **driven by money** - a source of concern for older respondents, who worried about the vulnerability of children to 'influencing'.

“We know that katy perry doesn't use Justeat! but brands are so clever, because they know that micro influencers work”

(Melina, 29, London)



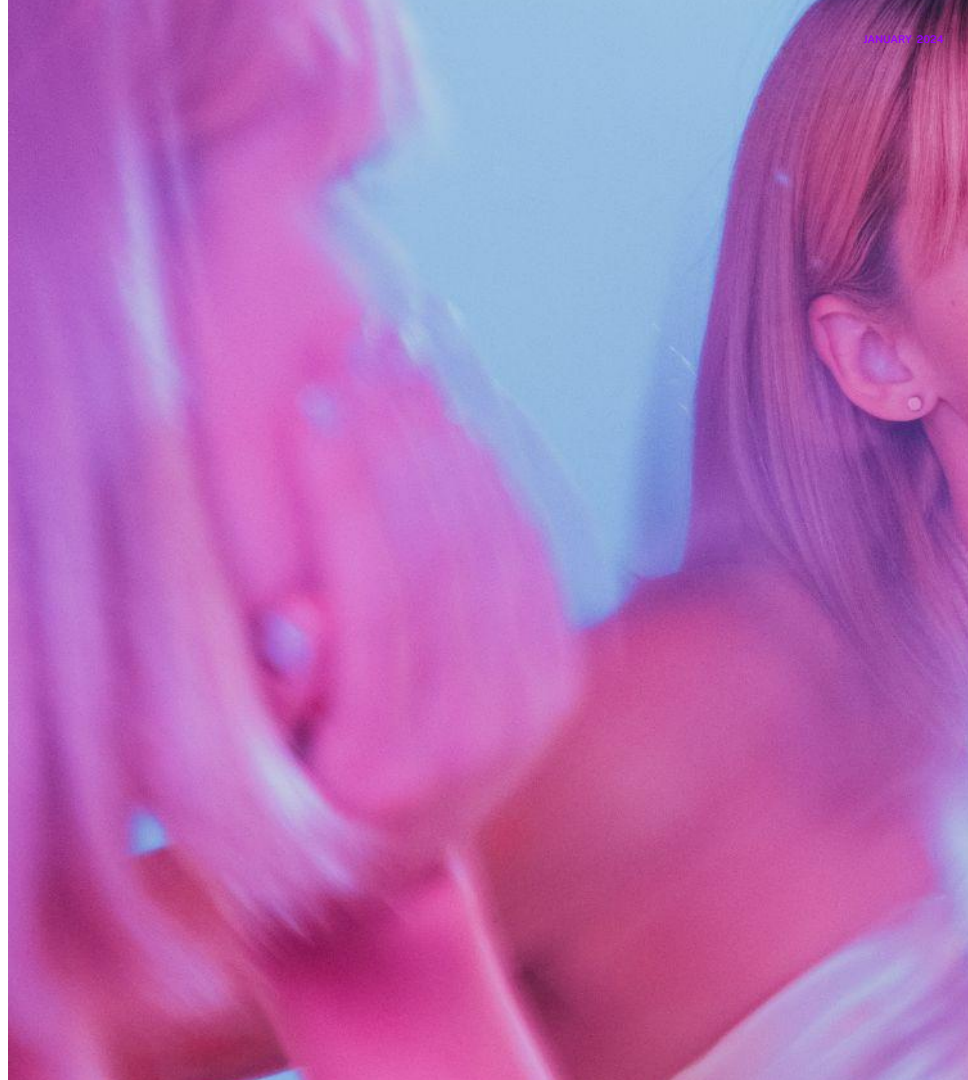
## CREATOR BOOM

## Where's this felt to be going?

While the majority of respondents felt that while creators will continue to thrive in the short-term, their long-term future was felt to be steeped in **uncertainty**.

Some respondents highlighted what they see as a generation of aspiring influencers. These respondents even imagined a future in which universities offer courses on 'influencing' - with content creation becoming a **more 'established' career path**. This was viewed with disdain by the majority of respondents, who derided influencing as a trivial, unimportant job - in contrast to what they see as 'real' careers: being a doctor, lawyer or teacher.

Others felt that the 'influencing economy' will become **oversaturated** and **'implode'** - with consumers growing fatigued and cynical as creators lose their reliability.



According to trend reports: thanks to social media, anybody can be a creator - shaking up who influences culture.

For our respondents, it's not that simple. there's a razor thin line between influencing culture and becoming inauthentic - a tightrope that few can walk.



