



US REPORT

Connecting the dots

Discover the trends that'll
dominate the US in 2023



GWI.

In this report

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Click the dots to navigate



Data sets included in this report



GWI USA

Launched in July 2020, GWI USA represents the habits, behaviors, and attitudes of 240 million internet users across all 50 states. With America changing fast, this ongoing study tracks new and emerging trends not typically covered by market research providers, like questions around cultural identity, race, and ethnicity.



GWI Core

Core is our flagship survey and the world's largest study on the digital consumer. Our data represents over 2.7 billion internet users, offers 57k+ datapoints, and tracks 4k+ brands across 48 markets. It never stops growing. By the second half of 2022 we'll be in 50 markets, launching our Core study in Norway and Chile.



GWI Zeitgeist

Fielded monthly, Zeitgeist zeros in on the stuff that matters. It's topical, timely, and relevant. The data in Connecting the dots draws on surveys carried out throughout 2022. This is a recontact study, which means that respondents also took part in GWI Core.



GWI Kids

GWI Kids represents kids aged 8-15 who use the internet. To get a real picture of today's kids, you have to go beyond demographics and simply ask them. And with thousands of demographic, behavioral and psychographic data points, that's exactly what we did. Dive into the hopes, fears, dreams and opinions of the youngest generation and find out exactly how to move them.

Discover the data on our platform

Every chart has a hyperlink that will bring you straight to the relevant question on our platform. You can then investigate all data by demographics, over time, and among your own audiences.

All the charts that use GWI Zeitgeist data also have links that will take you straight to the relevant question on our platform. There, you can dig into the data with no charge. That's because all GWI Zeitgeist data is free – and always will be.

The screenshot displays the GWI platform interface. The top navigation bar includes 'Charts', 'Audiences', and 'Crosstabs'. The main content area is divided into two panels. The left panel shows a filter configuration for 'New Audience 7 May 2020 12:33' with attributes like 'Gender > Male' and 'Age (Groups) > 16 to 24'. The right panel shows a summary card: 'Your audience sample size is 9,188 respondents out of 40,453'. Below this is another screenshot of a chart titled 'New Chart 6 Feb 2020 12:33' showing a data table with columns for 'Data point %', 'Universe', 'Index', 'Responses', and 'Audience %'. The table contains data for 'Someone in my household has a mental health issue' with various audience segments.

	Data point %	Universe	Index	Responses	Audience %
Someone in my household has a mental health issue	100	15.7K	84.9M	100	47%
	100	15.7K	84.9M	100	32%
	100	15.7K	84.9M	100	52%
	100	15.7K	84.9M	100	38%
	100	15.7K	84.9M	100	16%

1

Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report



Just click this icon to explore the data on the platform



Source

Information about the source and base



Base

Intro●



by
CHASE BUCKLE

You're about to witness the strength of ~~street knowledge~~ 360° consumer insight.

We've trawled through our data, and pored through the numbers. Here we present to you the most need-to-know trends for anyone looking to understand the consumer mindset in the year ahead.

We seem to be surrounded by crises right now, each of which can be understood using objective measurements and scales like GDP, CPI, global temperature, and loss of life. But different groups and cultures internalize the world around them in different ways, leading to different outcomes.

What we give you here is the subjective side of things: how do consumers feel about these crises? What's the deeper impact on people's worldviews and priorities? What are they doing differently as a result?

Here's what you have to look forward to

- **Connect** the dots between what people say, think, and do
- **Uncover** the deep logic and contradictions that make up the consumer psyche
- **Let data and insight** pinpoint the upcoming trends set to dominate 2023
- **Be inspired** and zero in on what really matters

The most need-to-know trends for anyone looking to understand the consumer mindset in the year ahead

The new American dream

How consumers are craving the simple life in 2023



by
MOANA TELLBUESCHER



The American dream is dead. Or not quite. But like many people, it's struggling a little.

Across virtually all areas of our research, we see signs of Americans lowering their ambitions, trading an appetite for success with more modest goals. While there will still be some post-pandemic splashing out, 2023 is likely to see similar changes in spending habits and in American culture as we observed during the **Great Recession**.

The years after 2008 saw Americans downsize in nearly every aspect of their life, from retirement to their children's future to everyday expenses. Similar changes are on the horizon in the next 12 months as consumers face up to a cost of living crisis. It's a full circle moment for some, as **I Need a Dollar** becomes all too familiar again.



The American dream is dead. Or not quite. But like many people, it's struggling a little



Stability is sexy

Here's the headline: Americans are getting worried about their financial security. 51% of the nation's consumers believe that the US economy will get worse in the next six months and confidence in personal finances looks to be waning too. Consumers have become more price-conscious about everyday expenses and, since Q2 2021, use of apps to track spending has increased 9%. Budgeting is back on the menu.

Lockdowns reminded consumers of how important personal relationships are. 34% say that being present for family and friends is their most important goal in life, an increase of 7% from last year. At the same time, the kind of YOLO (you only live once) attitude we saw when lockdowns were lifted is disappearing. Having a goal of "challenging myself" is down 8%, while "trying new things" is down 11%.

APP USAGE

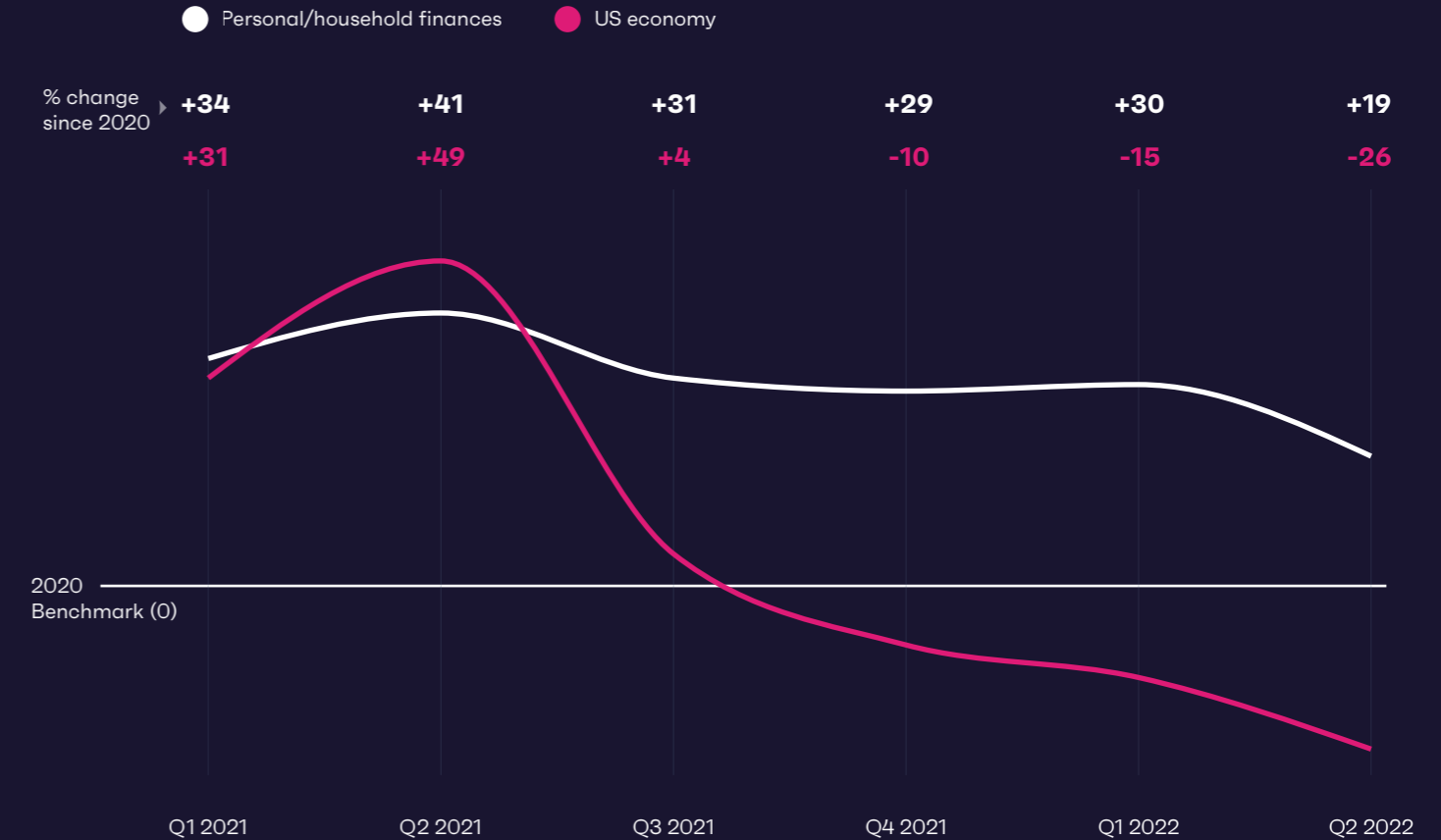
Use of apps to track spending has increased



Financial optimism is creeping back down

1

% change in the number of Americans who say the following will get better in the next 6 months (compared to 2020)





What's your dream job? "I don't dream of labor"

While consumers still value a workplace where they can challenge themselves and progress, salary, benefits, and time off take precedence. Boundaries are being set, and career goals have been redefined to fit the "I work to live, not live to work" narrative. And with good reason, as US workers face some of the highest levels of burnout and being overworked.

Striving for simplicity has led some to make big changes to their working life. Time away from a traditional 9 to 5 has allowed workers to explore other options, with the number who work while on the road or traveling increasing by 38% since Q3 2021. The search for the simple life is as much a cultural trend as it is an economic one. Some start the #vanlife because they have to, others because they want to.



Challenging themselves is rarely the priority at work

% of Americans who aren't retired and say the following are most important to them in a workplace

% 2

Salary/compensation 75

Work-life balance 64

Work benefits (i.e. retirement benefits) 56

Paid time off 51

Career progression 30

Workplace where I can challenge myself 23



(Not) Keeping up with the Kardashians

This is key for brands to understand in 2023 – especially in luxury and premium sectors. When times are hard, status symbols change. Sometimes simplicity is the biggest luxury, and people pay good money for it.

Since mid 2021, there's been an 8% drop in the number of consumers who want brands to be “exclusive”, which means that some high-end brands won't be able to rely on their logo as much as they used to.

**Sometimes
simplicity is
the biggest
luxury,
and people
pay good
money for it**



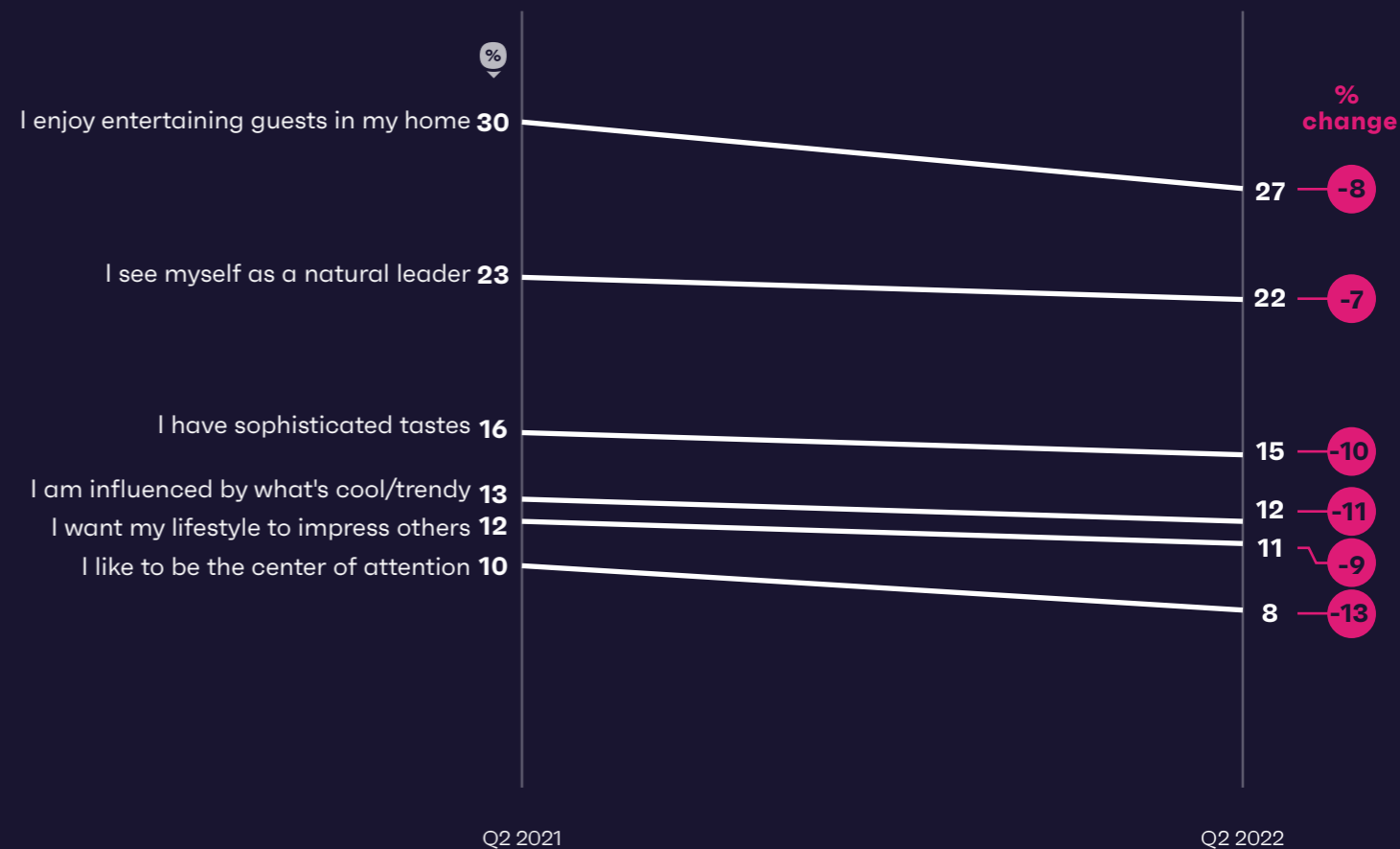
Americans are also much more modest about themselves. They see themselves as less sophisticated, less trend-focused, and less bothered about showing off.

Influencers could benefit from turning over a new leaf and branding themselves as a **'genuinfluencer'**. The number of Gen Z who say that following influencers is a top reason for using social media has dropped 22% since Q2 2021, while Americans of all ages are less likely to agree that social media is good for society. Yet interest in influencers is still there and growing, increasing by 16% year-on-year; and it will probably continue to grow, as long as the content shared shifts from aspirational to inspirational.

The emergence of social platform BeReal, which has branded itself as a life without filters, is also driving a change in online expectations. This has cleared the path for more inspirational material – year-on-year the number of Gen Z who use social media to find inspiration is up 12%. They're just less likely to be finding inspiration through chasing someone else's dreams.

The biggest decreases in self-perceptions

% of Americans who agree with the following, and the year-on-year % change for each statement



GWJ USA Q2 2021 & Q2 2022 40,224 Americans aged 16+



Good things come to those who thrift

Influencers are just the tip of big changes in the world of fashion. “Outfit of the day” inspiration will come less from influencers and more from your local Goodwill, as taking note of what influencers are wearing has dropped 7% since Q2 2021.

Economic downturns often prompt changes in fashion, especially when inflation sends the cost of materials soaring. Whether it’s the comeback of **indie sleaze** or something else, 2023’s hot looks will be a product of this quest for simplicity.

It will also provide a boost to the secondhand fashion trend. Comfort with buying preowned items is up 12% year-on-year, and little wonder as the hunt for the next best #ThriftFlip has garnered over 2.8 billion views on TikTok.



Back to basics

If Americans are less keen on impressing others, what might they be prioritizing instead? Bound up in these cultural changes around social media, fashion, and other areas, is a new focus on more offline activities.

Some of the fastest-growing personal interests for Gen Z year-on-year are handicrafts (+16%) and books/

literature (+15%). Both have a strong presence on social media, and making your own clothes is usually cheaper than buying them. But they also indicate a scaling down among young people in their online behavior in favor of more hands-on pastimes – especially when interest in gaming, television, technology, and computers are all down among 16-25s.



Your 101 guide to Gen Z in the US

Report

Don't get ghosted by Gen Z. Here's how to make this generation fall in love with your brand.

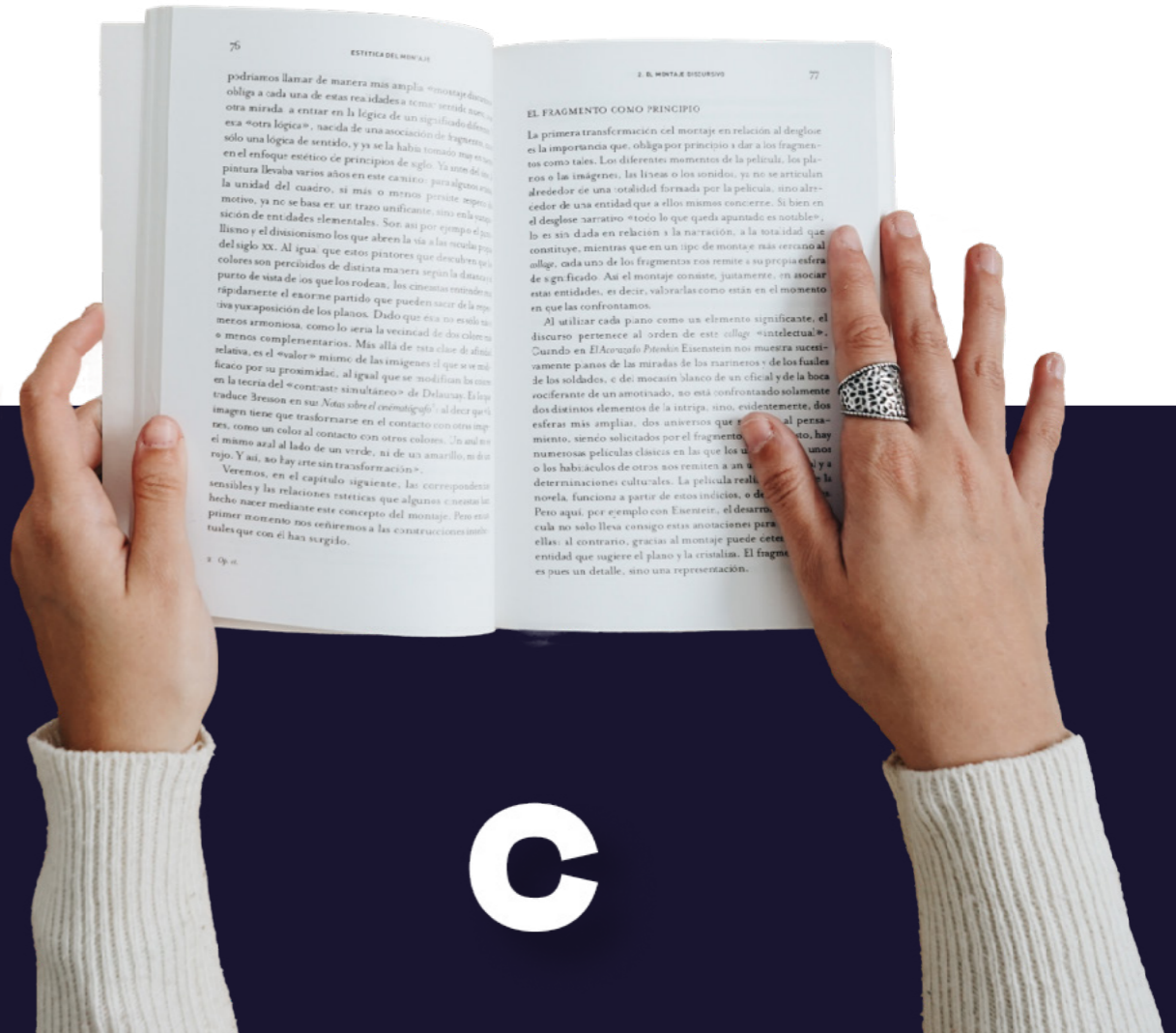
[Find out more](#)



a

b

c





Life in the slow lane

The automotive market is one of the best examples of just how differently consumer segments will behave in 2023. Since Q2 2020, there's been a 121% increase in the number interested in buying a Ferrari or Lamborghini. At the very top end, consumers will still want to splash out – even if they're more discreet about it.

However, many car owners see their vehicles as less of a way to express their personality and status – with those attitudes decreasing by 9% and 14%, respectively, since Q2 2021.

Value for money is also the new motto in the automotive world. More are keen to have a vehicle that's as cheap and easy to maintain as possible (+7%).

Travel is another example of this trend affecting people differently. Rich Americans are reportedly **spending more** than ever on flashier vacations. Though, generally, interest in new cultural experiences has decreased by 8% since Q2 2021, while the importance of familiarity with the destination has increased by 12%. Wanting good value for money has also ticked up.



Reframing the American dream

People's values and priorities are bound to shift over time – it's the natural progression of any society. But with the American dream so heavily embedded in US culture, a wider change in outlook is no small feat.

Americans have ultimately fashioned themselves a new dream based on the realities of today, one with more modest ambitions, and brands must cater to it.

Shake it off

American catharsis through media



by
TYLER ASHE

2.



Rising interests

Americans aren't living in a TV show like the namesake character from the 1998 film *The Truman Show*, nor can they exactly leave their world like Jim Carrey did. But in 2023 they'll be looking for an escape and some catharsis in the world they're living in.

Americans are dealing with a lot coming out of the pandemic - a cost of living crisis and security concerns to name a couple. And it's taking a toll. According

to the **General Social Survey**, only 19% say they're very happy, which is by far the lowest it's been in 50 years.

Religion has acted as an outlet for tough times before, but other practices and beliefs are becoming go-tos. Interest in religion has declined in the last two years, while interest in spirituality and astrology are up. While we joke about Mercury being in retrograde, we can't joke about a billion-dollar business.



We accept the reality of the world with which we're presented

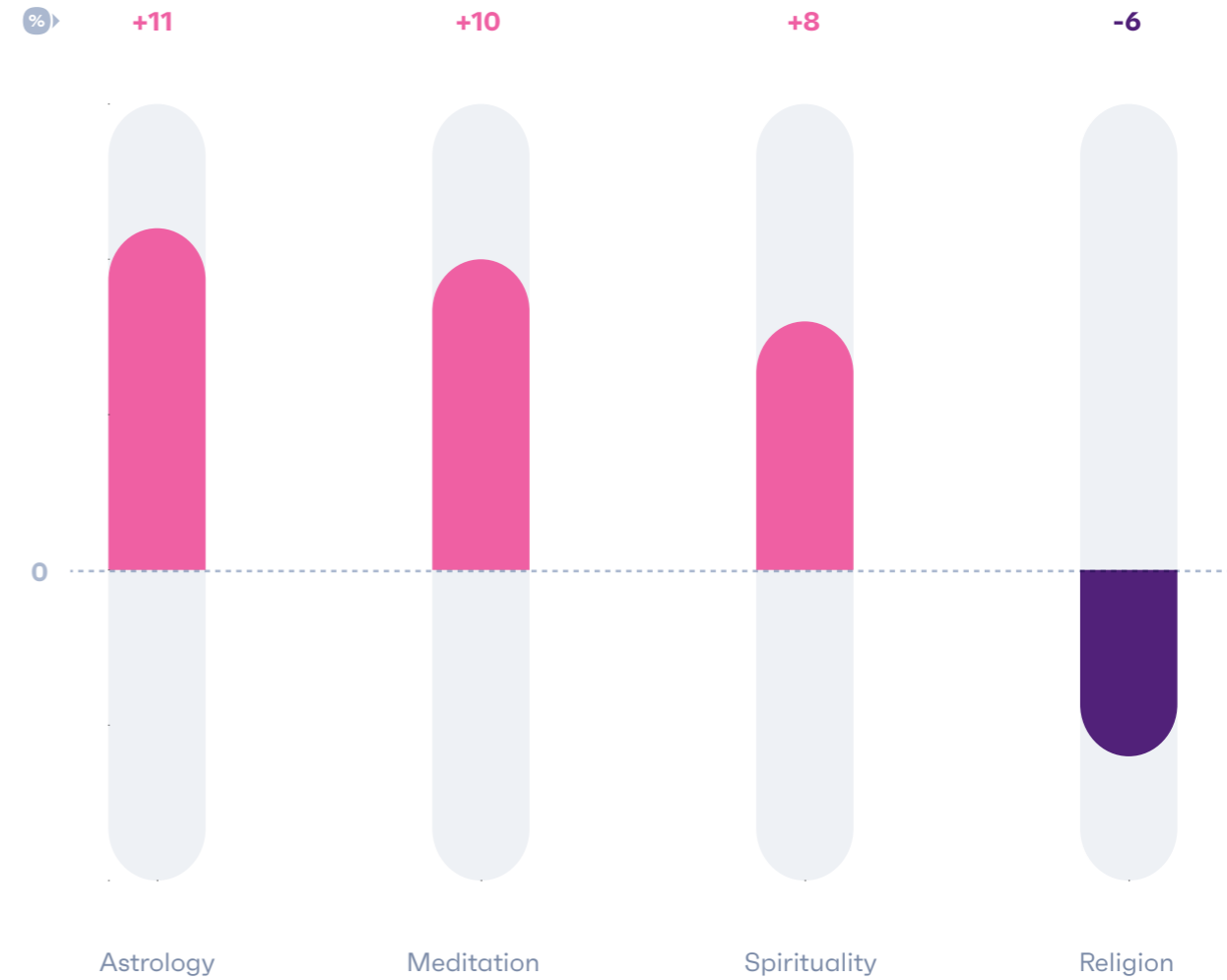
CHRISTOF

The Truman Show (1998)



Americans are taking an interest in astrology

% change in Americans interested in the following since Q2 2020



Apps such as Co-Star (which share birth charts and horoscopes with users) have captured the attention of venture capitalists. And even celebrities are celebrating their links to the stars. Beyoncé, one of the most-streamed artists in the world, frequently shouts about her Virgo sign, including a track called VIRGO'S GROOVE on her latest album.

Others aren't looking to the stars for guidance, but they are looking to media for an escape. Americans now have ample stories to invest their emotions in. With our research into trending genres, we can forecast what sort of media will resonate most with viewers and listeners in 2023.

GWK USA Q2 2020 & Q2 2022 41,148 US internet users aged 16+



▼ 65°F



Out of the frying pan, into the fire

When the first lockdowns started, over 80% of Americans thought the pandemic would last 6 months or less. Of course that didn't happen, and restrictions were mostly in place until mid-2021, a full year longer than most Americans predicted.

The pandemic saw many issues – over-run hospitals, mass layoffs, and a high death toll from the virus itself. When restrictions started to ease in early 2021, US consumers were pretty optimistic

about the future. 37% thought the US economy would get better as well. Today, that number has decreased to only 18%.

Now a **cost of living crisis** is slashing budgets, as consumers struggle to pay their bills. Fears of tax increases have also worried US consumers, with many thinking their already scarce budgets will shrink more. Concerns about gun violence and geopolitical tensions have also risen. 15% of US consumers say they're never satisfied with their life, up 6% from last

year - and one of the fastest-growing sentiments in the US.

With all that is going on, Americans desperately need catharsis – a way of releasing, or managing, the frustration they're facing. For many, this is coming through the media they consume.

Much of the situation Americans find themselves in is out of their control, but they can choose what they watch or listen to.

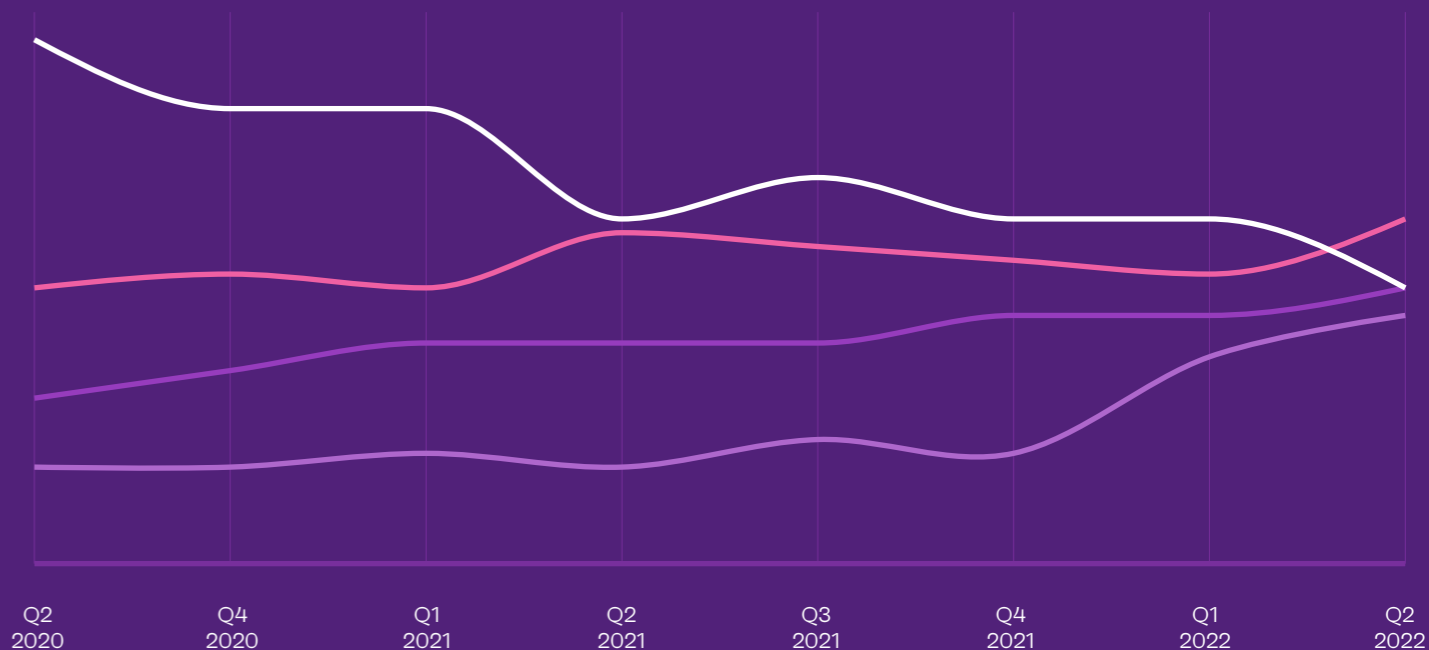
Safety and tax concerns have increased

5

% of Americans who say they are worried about the following

● Infectious diseases and viruses ● Gun violence ● Tax increases ● Tensions with foreign countries

	Q2 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022
Infectious diseases and viruses	58	53	53	45	48	45	45	40
Gun violence	40	41	40	44	43	42	41	45
Tax increases	32	34	36	36	36	38	38	40
Tensions with foreign countries	27	27	28	27	29	28	35	38





True crime, true emotions

The first CrimeCon in 2017 saw 800 fans packed in a hotel. In 2022, the event saw 5,000 attend. It now has plans to go international - and there's even a cruise ship gathering in the works. We're not surprised by this.

While the subject matter may be morbid, it makes sense why Americans are so drawn to it. The story allows for the listener to exclaim disgust at the crime, then relief when the perpetrator is caught. The legal system sends the perpetrator away, and the justice system prevails. Whether or not this ending

happens in real life, the listener doesn't care. They can release their emotions, and escape reality for a little bit.

Over half of Americans say they listen to audio - be that music, podcasts, audiobooks, or talk radio - to help them relax, and over 1 in 3 say it helps release stress and anxiety. With mental health increasing in importance, consumers are turning to media to help them through the day. Advertisers are taking notice too. Online mental health company **BetterHelp constantly outspends** other advertisers on podcasts.

True crime is one of America's favorite podcast genres, and it saw a 21% growth in listeners from Q2 2020

Audio content helps Americans relax

% of Americans who listen to audio content for the following reasons





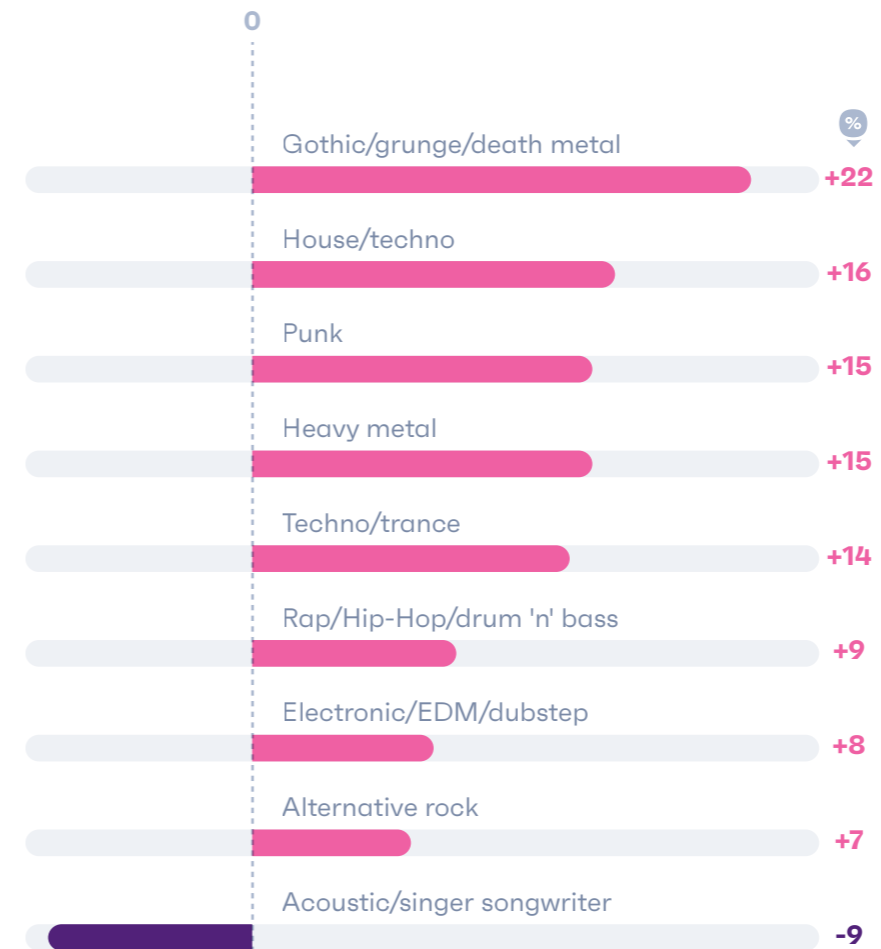
While podcasts boast advertisements from mental health companies, music has gotten aggressive. Some of the fastest-growing genres in the last two years are metal and punk, alongside high-BPM (beats per minute) genres like house and techno. Meanwhile, the genre falling most in popularity is acoustic/singer songwriter, which notoriously sits on the quiet side of the volume dial.

Fans of metal and punk, as it happens, are 15% more likely than the average American to agree that mental health is important. Headbanging, as it turns out, is cathartic.

Aggressive genres have risen in popularity

7

% change in American listeners of the following genres since Q2 2020



GWI USA Q2 2020 & Q2 2022 41,148 US internet users aged 16+

The hottest US entertainment trends

Report

What's winning in America's attention economy?



Get the story





Catharsis on the couch

20% of Americans say they've experienced anxiety regularly or often, up 32% from two years ago. The percentage who feel anxious while watching content? Only 3%. However, nearly half indicate that they watch content as an escape/diversion. Americans are watching TV/movies to distract themselves from what's going on away from the screen.

On the small screen, viewers have been steadily losing interest in the news. With the economic and security crises going on, Americans are trying to avoid it, and any **anxiety** it may bring on – a feeling they know all too well. So what's playing instead? Action/superhero movies for one. This isn't a surprise as Marvel movies have made over **\$10 billion** in US box office revenue, and Marvel accounts for **4 of the 7** most watched shows on Disney+.

Americans see their action shows and movies as a **cathartic experience**, knowing good will almost always overcome evil, but they're kept on the edge of their seats. These stories are also exciting for the eye, as CGI has

made action movies a spectacle. Away from the action, Americans are also in the mood for love. Times of economic hardship make romantic comedies a particularly popular genre. **Screwball comedies**, the predecessor to rom-coms, were born in the Great Depression. Romance and romantic comedies as a genre are up 9% in popularity in the last two years. Like action movies and true crime podcasts, these movies and shows are full of clichés and tropes, but almost always, the characters resolve their issues and come together for a happy ending.

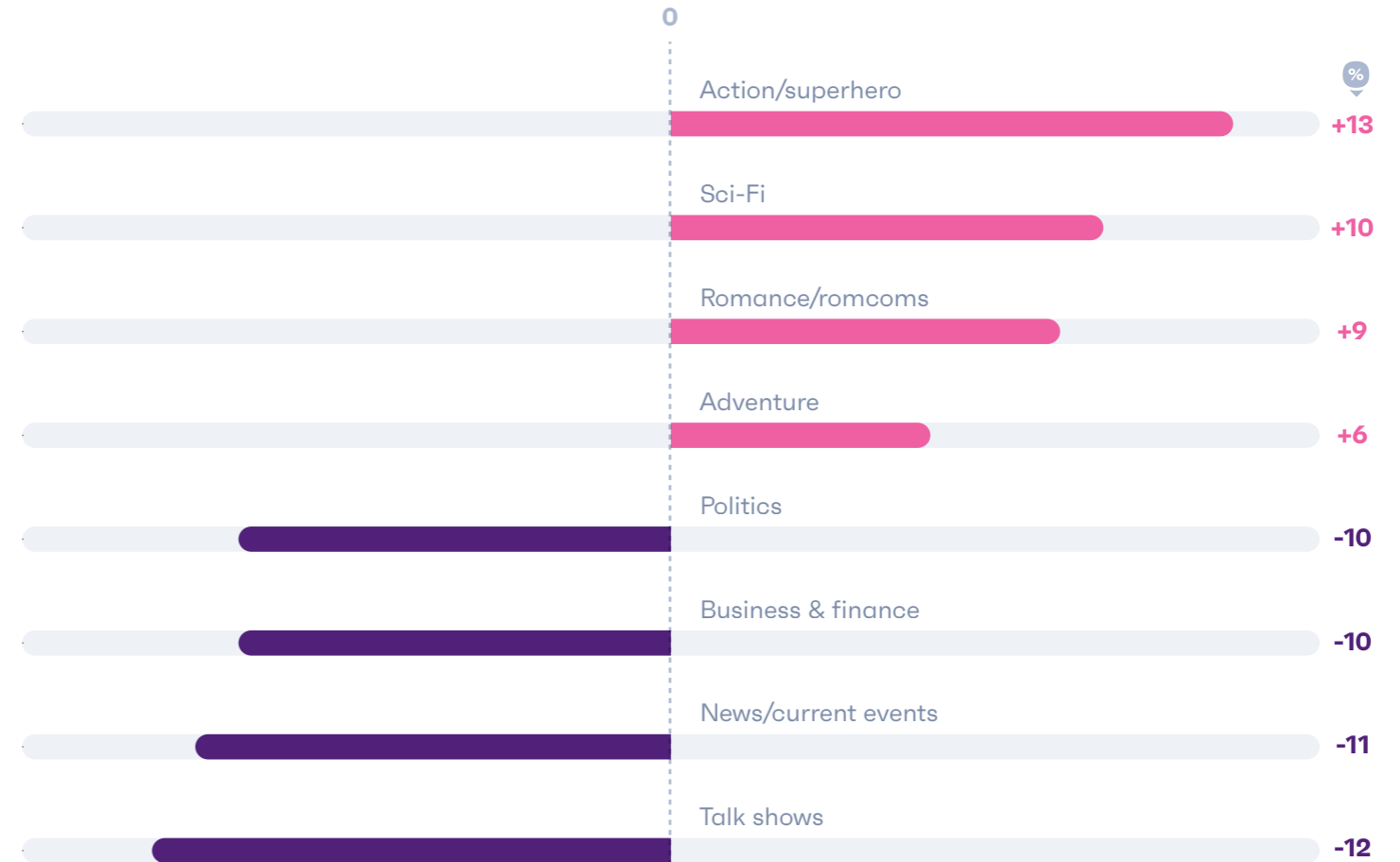
These more formulaic genres are opposites to the world Americans find themselves in. People are struggling to make ends meet. Safety seems to be at an all-time low both at home and abroad, and tax hikes still weigh heavily on the mind. And they can't do much about it.

What can they do? Turn on the TV and select the movie or show that they know will take them through an emotional ride, but will ultimately end well for the good guys.

Action and romance are getting more viewers

8

% change in American viewers of the following TV/movie genres since Q2 2020



GW I USA Q2 2020 & Q2 2022 40,126 US TV/movie viewers aged 16+



Been so down and under pressure

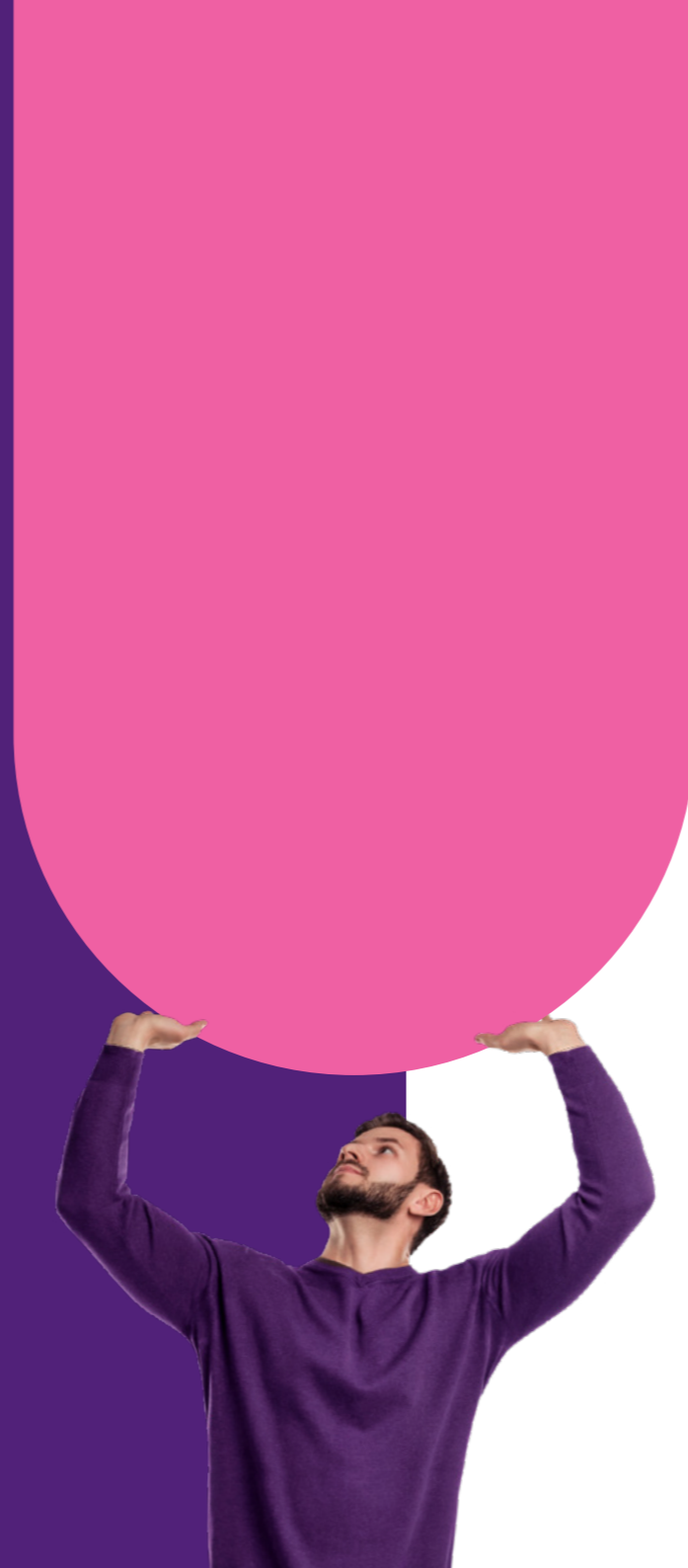
Even if Americans know that these stories will end, it's the cathartic journey of the protagonist triumphing over their fears that brings them back, and maybe they hope to triumph over an unpredictable and ever-changing world.

The next 12 months will be interesting for Americans. Some aspects of the cost of living crisis are improving, but it's still left a hole in their wallets. The midterms will shape the political narrative for the next two years, and may give rise to new fears. In that climate, lifestyle habits and media preferences will continue

to provide emotional release. Some old favorites will continue – Marvel movies are **scheduled out** to 2025, while true crime will benefit from a podcast market **expected to grow** 31% annually to 2030.

Other things – like **New Age spirituality**, **high-BPM music**, and romcoms – could represent new arrivals, bubbling up from subcultures and fandoms.

The final word to sum up what consumers want to do in 2023 should go once again to Beyoncé, from her number 1 hit BREAK MY SOUL:



Release ya anger, release ya mind.

BEYONCÉ
BREAK MY SOUL

The exhausted States of equality

How Americans want brands to
approach social justice in 2023



by
LAURA CONNELL

3

In May 2020, the Black Lives Matter (BLM) protests in response to the murder of George Floyd left a deep impression in America and around the world. Since then, wider attention has moved to a host of social justice issues including women's rights, the LGBTQ+ community, and climate change.

As the emotional labor of the last two years has taken a toll, interest in equality, social issues, and volunteering are in decline. According to our data, fatigue is replacing fighting spirit.

Since 2020, the key theme has been "we need to do better". But as other priorities weigh on consumers' minds in 2023, they will be increasingly tired of hearing that message from brands. They will want evidence that brands have actually created change for America.



Shifting focus

Less talk, more action. It's an obvious statement, but one that continues to be top of mind for consumers. Over the past two years, whenever social justice has been on the agenda, consumer sentiment toward brands has been consistent. They want action, impact, and results – not meaningless PR pushes.

After the initial BLM protests in 2020, US consumers wanted brands to review their hiring policies – instead of showing support via social media.

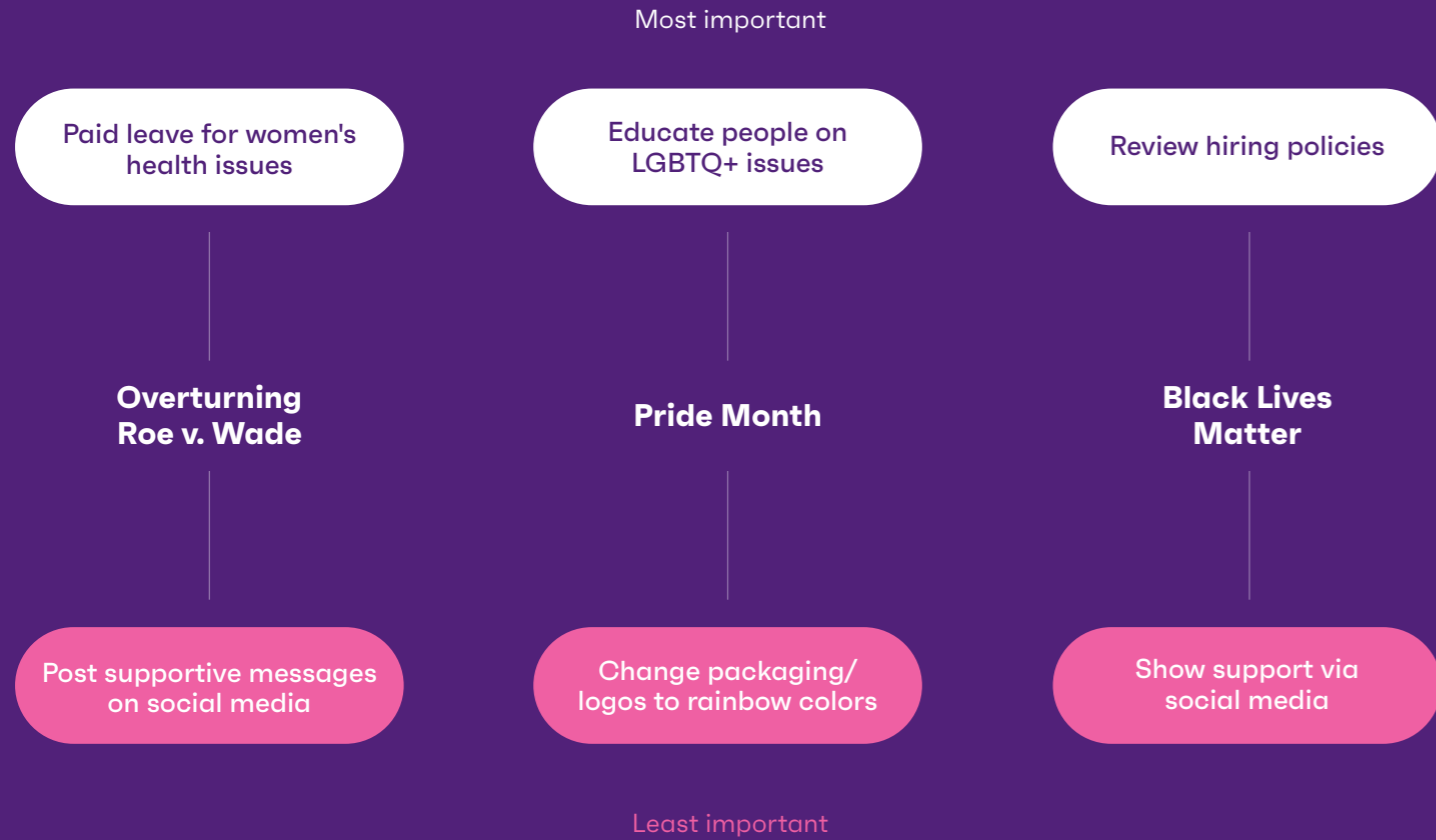
During Pride in 2022, US consumers' top priority for brands was to educate people on LGBTQ+ issues and misconceptions – not changing logos and packaging to rainbow colors. After **Roe v. Wade** was overturned, US consumers wanted brands to provide paid leave for women's health issues – rather than show support on social media.

In 2023, brands should take these messages from consumers in the last two years as absolute truth – shift your focus to assistance, education, and action.

Consumers want to see practical behaviors from brands

9

Most/least important brand action for each social cause, based on the % of Americans who want companies to do the following to support it



GW
 GWI Zeitgeist July 2022 • May 2022 • Coronavirus Study Wave 5
 5,110 US internet users aged 16-64 • 4,154 US internet users aged 16-64 • 1,351 US internet users aged 16-64



Breaking old patterns

These feelings will become more acute in the next 12 months as an uncertain economy, coupled with a sense of compassion fatigue, will force consumers to prioritize what they're really concerned about.

Alongside infectious diseases, election integrity, and job security - police brutality and racial relations are among the fastest-falling worries for consumers in the US since Q4 2020. In contrast, in line with current world events, some of the fastest-rising concerns are tensions with foreign countries and tax increases.

On the surface, these figures appear encouraging because they suggest **some progress** has been made, but it's a good example of how although we might see a trend decline, it doesn't always show the full story.

Black Americans are still disproportionately concerned about police brutality and as of Q2 2022, they're 20% more likely than Asian American and Pacific Islanders (AAPI), or Native Americans to worry about racism. And even though there are relatively similar decreases in concerns for racism between Black (-14%) and Hispanic (-15%) people since

Q4 2020, the same is not felt by AAPI (-1%). Reports have found that discrimination has **increased greatly** for the AAPI community since 2020.

Many, particularly **white consumers**, may have felt invigorated by the discussions in the last two years, but for some, the messages were merely a longstanding repeat of what has been said time and time again; injustices remain systemic, and more needs to be done. 62% of US consumers care about the impact of social justice issues. And that's the key word - impact.

We've seen how **brands can play a dynamic role** in social justice causes when they follow through on their public acknowledgments. **Advocacy indicators** and **accountability** commitments to social justice causes are still every part as valid as they were two years ago.

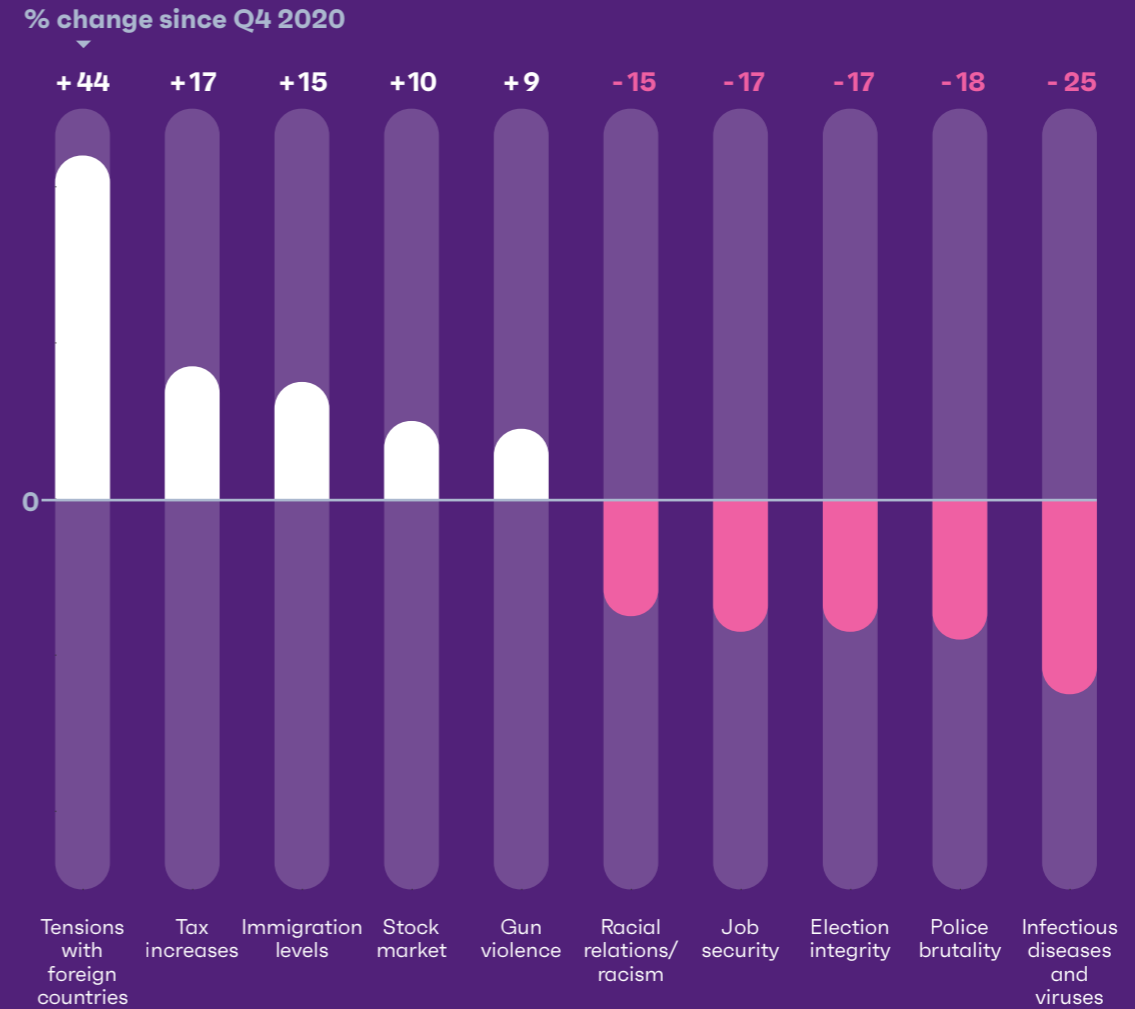
But brands need to think long-term. Results and successes take time to build and cut through the noise. Putting out statements for self-serving reasons, or because everyone else is, can be actively harmful - 46% of US consumers are tired of hearing about social justice causes all the time.

62%

of US consumers care about the impact of social justice issues. And that's the key word - impact.

Concerns have changed in the last two years

% change based on the number of Americans who say they worry about the following since Q4 2020



Want to see this data in more detail?

Find out more



Supporting diversity in the workplace is the fastest-rising brand initiative



Consumer priorities have changed

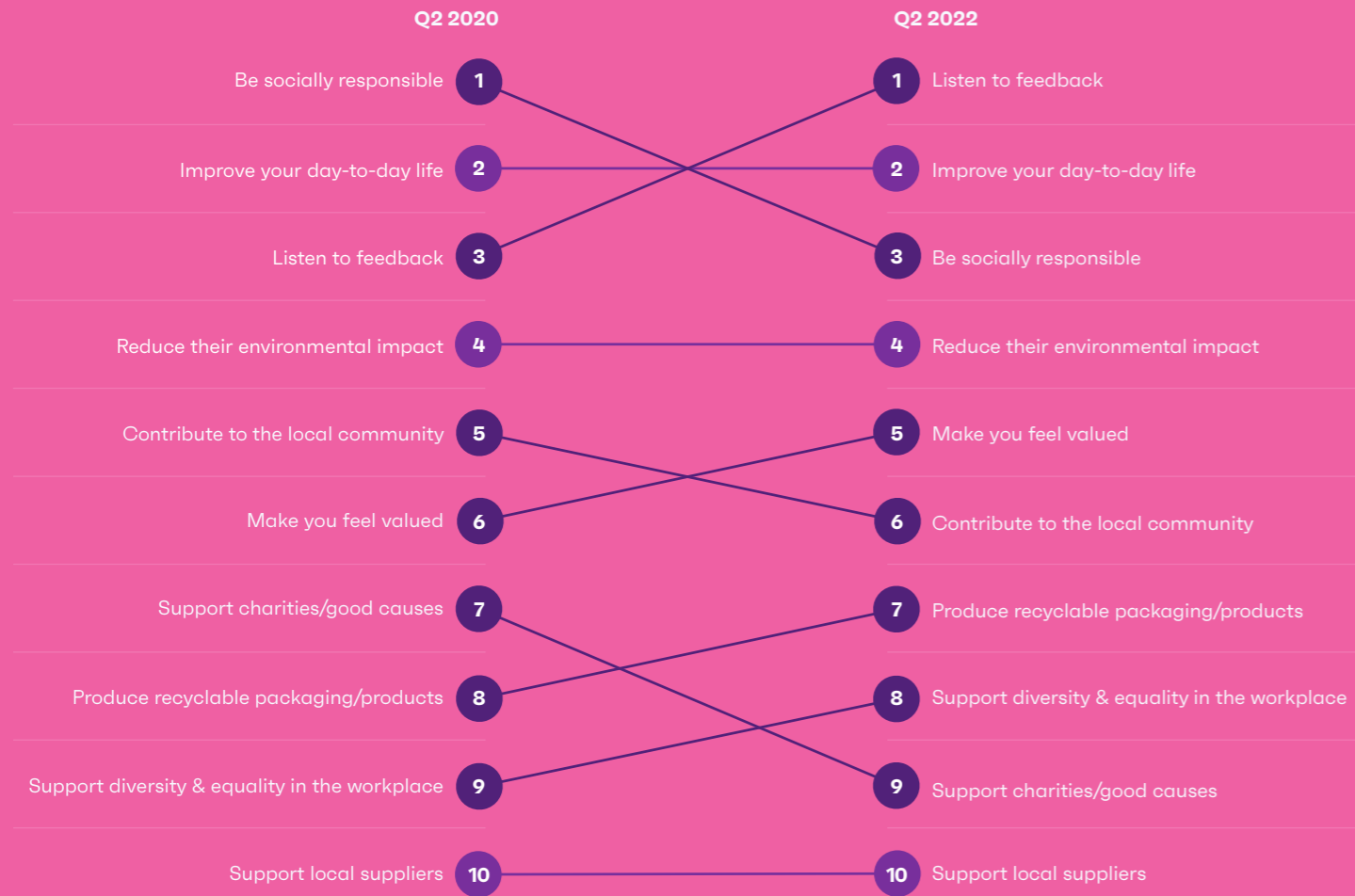
Our data from Q2 2020 reflects the mood of the nation during the height of the BLM protests - being socially responsible was the number one brand priority for Americans. Two years later, this has shifted to rank third in Q2 2022. In fact, it's the fastest-falling brand initiative since 2020.

This shift is mainly due to decreasing sentiment from older white consumers. We've seen an 8% decrease in white Americans agreeing brands should be socially responsible, followed by baby boomers (-9%) and Gen X (-11%).

Brand priorities are shifting for consumers

11

Rank based on the % of Americans who most want brands to do the following



Dr. Joseph Flynn refers to this as **white fatigue**, a wearying of potential allies in the fight against racism, and it's a problem that has persistently taken place after historical racial movements; allyship fades.

But for AAPI and Black Americans, this priority has remained unchanged. For People of Color (POC) in America it's just as important as it was two years ago.

Even though being socially responsible has dropped in consumer priority, this doesn't mean brands are devoid of responsibility. Here again we see the pattern – consumers want brands to walk the walk, not talk the talk.

Supporting diversity and equality in the workplace is the fastest-rising brand initiative. Predominantly led by younger generations, we have seen considerable increases across all racial and ethnic demographics, and it's an example of an area where brands can begin to enact real change. Even while strong messaging of support can be a good start, walking the walk is the more pressing issue according to consumers.



Adopt a people first mentality

When it comes to social justice causes, workers want to be at a workplace that supports them both professionally and personally. And what happens in the workplace impacts consumers too – 47% say poor treatment of staff would discourage them from buying from a brand.

But in the last two years, many **DEI leaders** (diversity, equity, and inclusion) have felt the pressure to focus on immediacy rather than long-term change, which has led to many Chief diversity officers (CDO) feeling the effects of **burnout**. The average tenure for a CDO is now **less than 2 years**.

With 29% of Gen Z and millennials wanting a working environment that makes them feel like they're contributing to society, the challenge for brands

now is to transfer their accelerated efforts from 2020 into supporting the work being done by those in critical DEI roles.

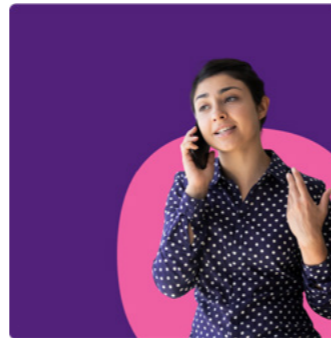
Focusing on the mental health of employees can be one way to alleviate the personal and professional pressures that social justice causes may create. There are **many examples** of where brands have integrated services such as on-site psychologists, insurance coverage, and one-on-one coaching.

Practical positioning to integrate **diversity and inclusion** into the root of your business structure, rather than seeing it as a separate initiative, alongside a compassionate recognition within your brand's core **values**, are incentives to aspire to.

Your 101 guide to millennials in the US

Report

From online TV habits to social media usage, get the answers you need on this generation.



Download your copy



It always excites me when I can see a brand bring their presence, their platform, their authority and their capital to uplift the voices of those already doing the work

KEVIN ECHAVARRIA
McCann Worldgroup global DEI



Recognizing responsibility

Over half of Americans wish the US government did more to help social justice causes, moving responsibility toward the systems and institutions that have the ability to create lasting change.

But only 36% believe that positive progress is being made in the US.

People of color (POC) feel a greater sense of care and responsibility for social justice causes compared to white consumers. We've seen how, just **one year after the BLM protests**, America changed.

But now, for many consumers, the effort to maintain the fight for social justice is leading to a greater sense of fatigue.

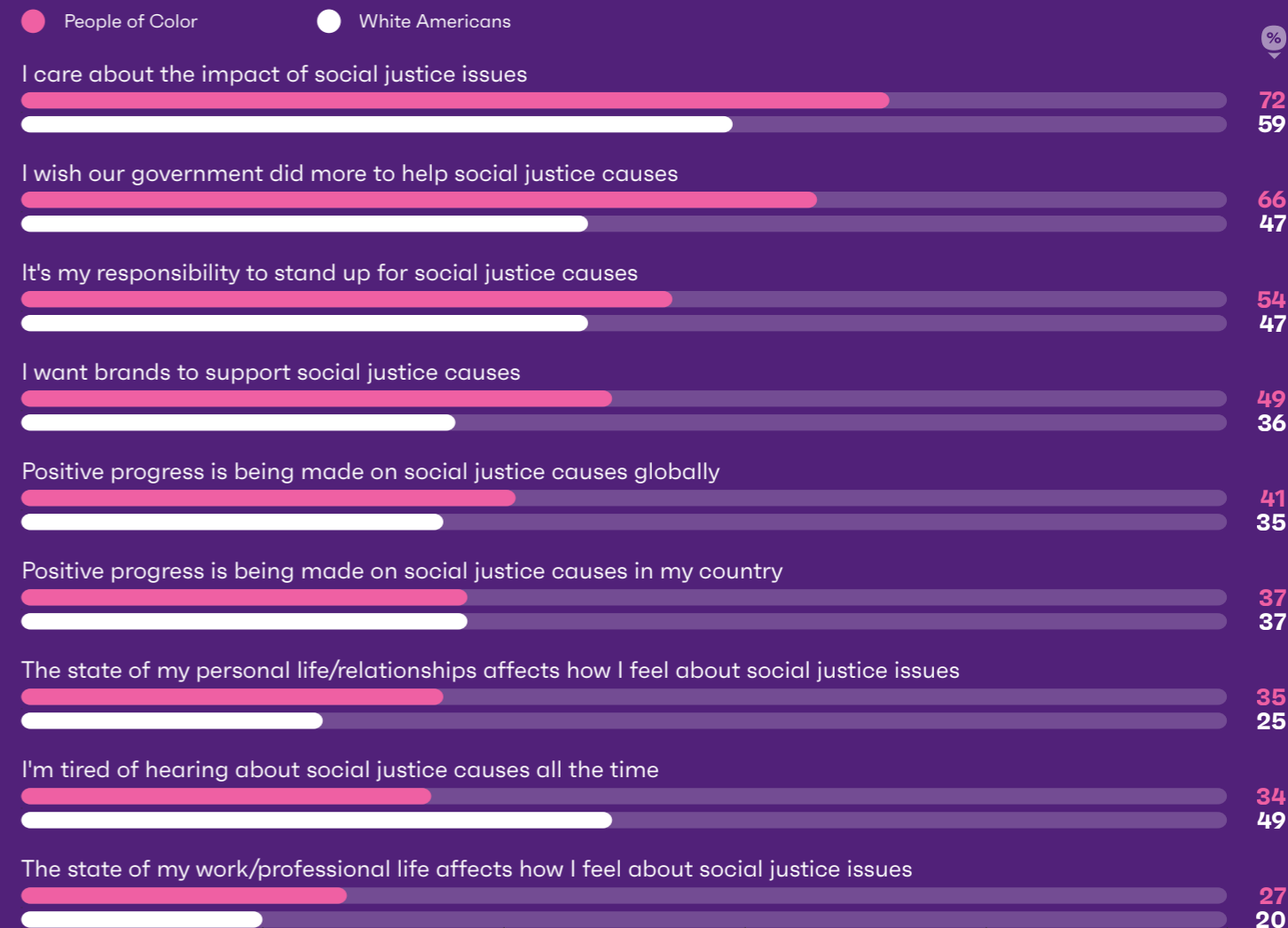
Although **boycotts** are one way consumers choose to tackle social injustices to place negative media attention and economic pressure on a brand, there's long been **speculation** on their effectiveness. It's an example of how methods to fight social justice causes are becoming exhausting for consumers.

The effort to maintain the fight for social justice is leading to a greater sense of fatigue

White Americans are still lagging in interest for institutional injustices

12

% of Americans who agree with the following



GWI Zeitgeist August 2022 2,037 US internet users aged 16-64



Reframe how to foster inclusion

Social injustices in the US will take time to amend, and brands will play a role in that. But in 2023, brands have to be aware of consumers' collective head-space, what's important to them, and how they want to see change in these areas happen. Focus on what consumers really want – meaningful action, communicated when it's achieved clear results.

Put purpose into practice. Brands that understand what's truly important to consumers will succeed, and those who don't risk being left behind.

Focus on what consumers really want - meaningful action



OK doomer

How consumers could get
fatigued with climate change



by
STEPHANIE HARLOW



Over two-thirds of US consumers feel concerned about the potential global impact of climate change. And just as many are concerned about the impact it could have on the US itself. The state of the environment **hasn't improved**, and in 2022 all corners of the country have been hit **with extreme weather**.

Most Americans view climate change as a real threat. But our research suggests that in 2023 they may, paradoxically, want to stop hearing about it. They'll still expect brands to take action, but will likely be less willing to hear about it in the news and on social media.

Although pessimism around the environment is up since 2020, the number who actively worry about it hasn't changed. And around a fifth of consumers are tired of hearing about the climate crisis completely.

If things don't change we're likely to see more **climate doomism** - when people believe the battle against climate change has already been lost. Even with the passing of landmark climate change **bills**, the idea continues to **go viral**.

Both news publishers and brands will have a stake in managing Americans' feelings toward the environment in 2023.



Doomism ultimately leads to climate inaction, which is the opposite of what we want

ALAINA WOOD
Sustainability scientist

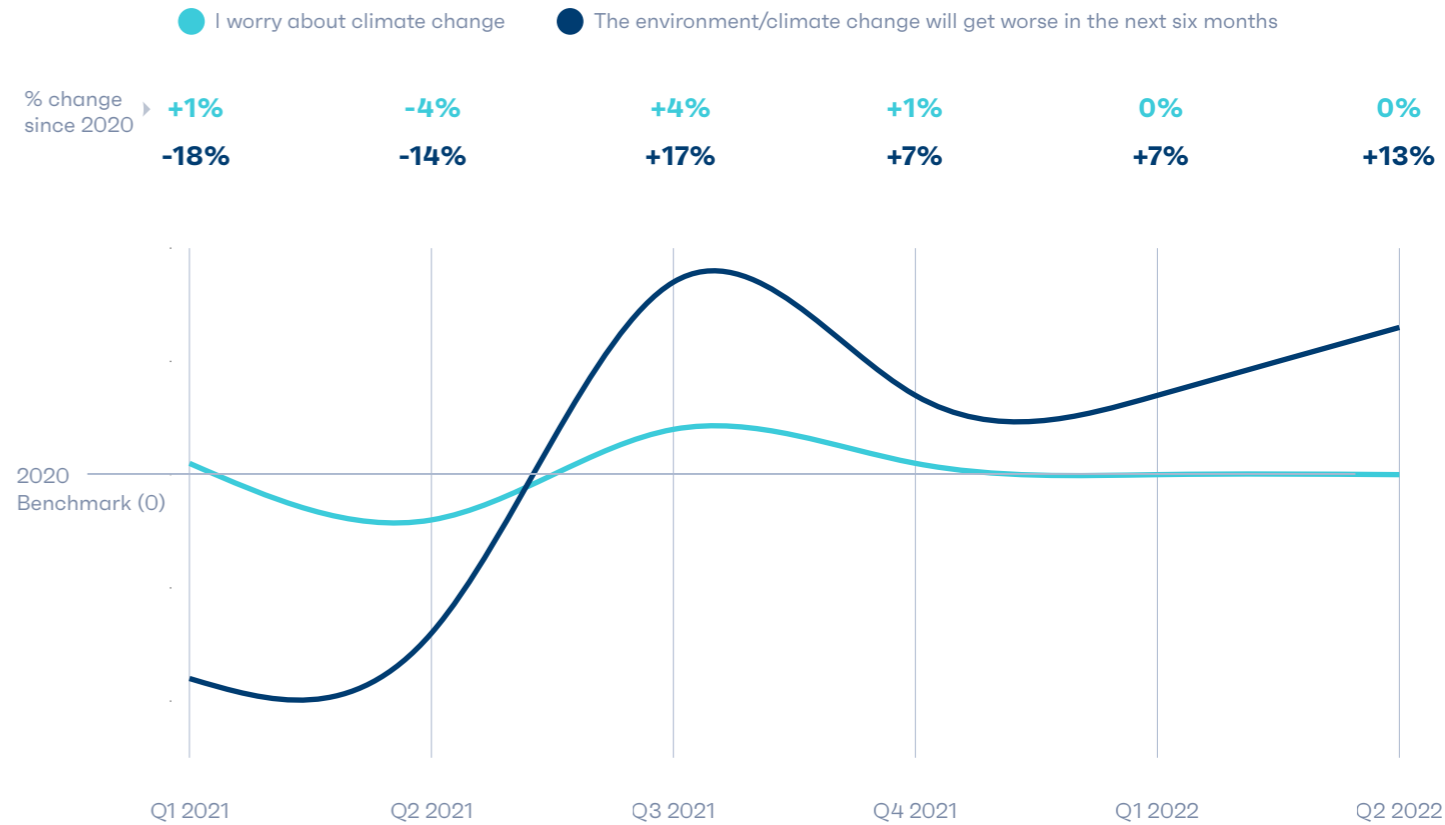


A strong case of crisis fatigue

Concerns about climate change have remained stable over the past two years, but the number who think that climate change will get worse in the next six months has significantly increased. People feel that the situation is getting worse, but their levels of concern aren't increasing.

Environmental outlook is getting worse, but worry remains stable

% change in Americans who feel the following since 2020



Put simply, many are fed up with the situation, and it's having a knock-on effect on how they feel and what they're doing about it – **repeated exposure is causing fatigue**.

And while Gen Z are the most concerned about the future of the environment, they're also more likely than millennials to be tired of hearing about it. They're a good example of how concern can spill over into doomism.

Next year's cultural context is important. After two years of being locked down and **languishing**, people will still be grieving the opportunities they missed out on, and trying to make up for time they lost. It's one of the reasons why so many people booked a **revenge vacation** in 2021, and why worry about travel's environmental impact has dropped 10% since Q2 2020.

Now there's a possible recession in the pipeline – and if the economy takes a downturn, **evidence suggests** concern for the environment

goes with it, as consumers prioritize other things. Our **Work** data also shows that businesses' biggest challenges next year will be less about becoming more sustainable and more about managing the *economic* climate.

Not only do Covid-19 and a possible recession have an impact on climate attitudes, they're a pair of crises occupying the headlines alongside the war in Ukraine, abortion rights, and mass shootings.

If we add climate change into the mix, it could all become too much for some people.

We can see this in our data too. People's interest in news and current affairs is down since Q2 2020. In April 2022 a quarter said they were spending less time reading the news since the pandemic started to manage their mental wellbeing, and the climate is another topic likely to see consumers switch off for the sake of their health.

Many are feeling overwhelmed and helpless right now, leading to a phenomenon called “crisis fatigue”, which is what can happen when we're exposed to constant pressures

Offering consumers opportunities to actively support the environment is also likely to help overcome doomism



Individual power

When it comes to taking individual action, people's behaviors are mixed. Many are choosing where to save and where to still spend, so sustainable actions could fall by the wayside while they treat themselves where they can.

That said, a number of cost-cutting behaviors people are doing will end up having a positive impact on the environment too.

Using a reusable water bottle and shopping bags are the most popular sustainable actions among consumers. These kinds of actions are likely popular because they help consumers feel like they're playing an active role, but can also save money.

With many looking to save where possible, consumers are likely to be tempted by schemes that offer them opportunities to save money or cut back.

Historically, recycling in the US has **lagged behind other countries**, and just **5% of plastic waste** is being recycled. But there are schemes looking to tempt consumers into disposing of their waste sustainably.

H&M, for example, has **recycling boxes** in stores across the globe where consumers can drop off a bag of old or unwanted clothes in exchange for a thank-you coupon toward their next purchase.

Tapping into consumers' thriftiness is one way of squaring sustainability commitments with a poor outlook for the economy.

Importantly, it's the kind of practical action that consumers will respect, even as they tune out of some of the coverage around climate change.

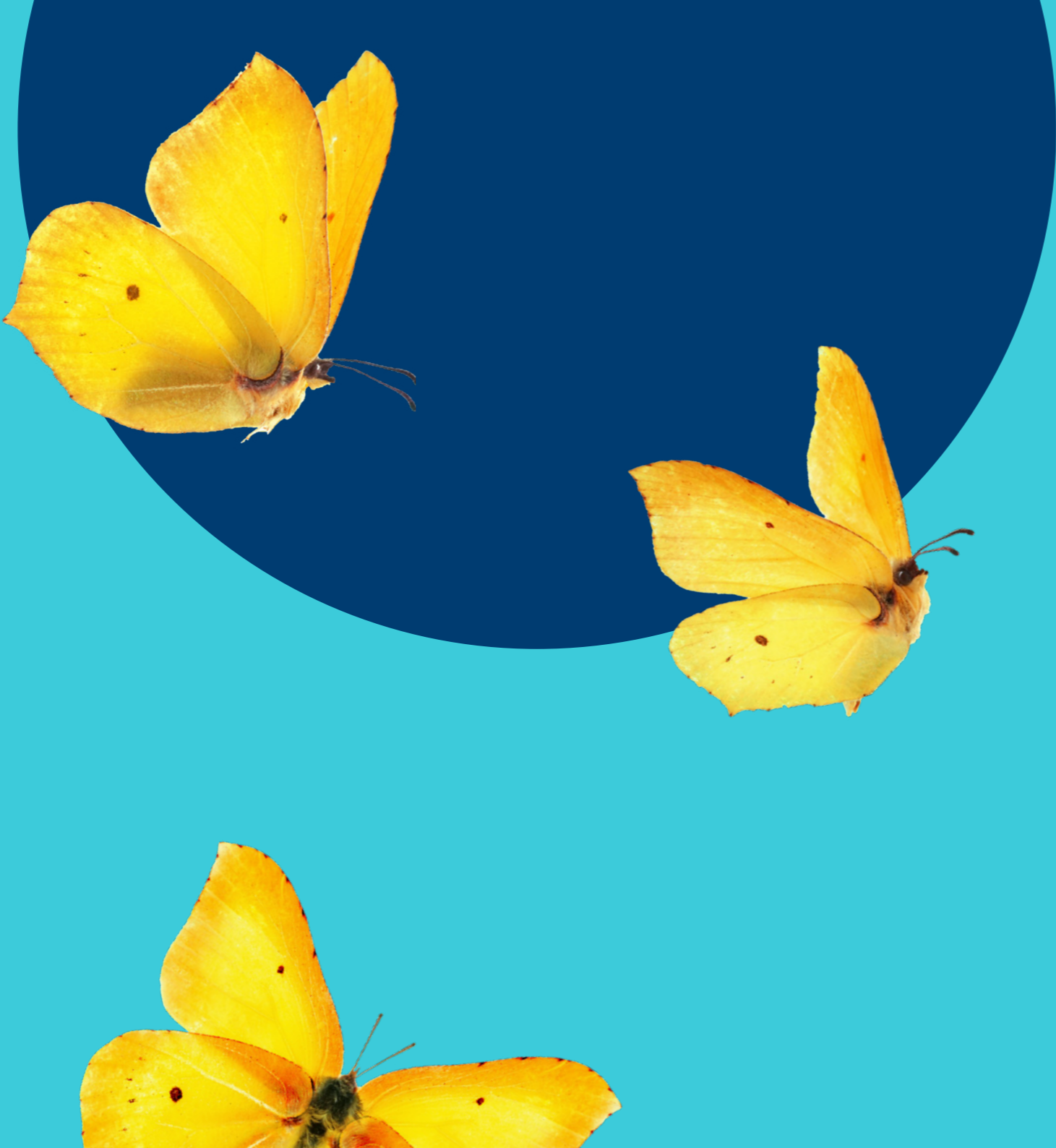
Sustainability in the US

Report

Are American consumers price-conscious or eco-conscious? What's getting culled in the cost of living crisis?



Download your copy



Brands aren't off the hook

While people are fatigued with the climate change narrative, they still expect brands to be eco-friendly – that hasn't changed.

Consumers aren't fed up with brands taking action on climate change – but they'll be critical of brands that make a lot of noise with nothing to show for it.

Something that's gaining momentum is a type of law known as **extended producer responsibility**. It means that producers are charged a fee, which is used to pay for recycling programs. The knock-on effect means that companies have an incentive to ensure their products are designed to be **more recyclable**.



It's these little moves that put the onus on companies rather than the consumer alone. If people see brands leading from the front, they may feel more supported.

In September 2022, Patagonia reminded everyone what practical action actually looks like. Its billionaire founder, Yvon Chouinard, **gave away the company** to a trust that will use the profits to help fight climate change.

While most companies can't do the same, it sets a new benchmark that can't be ignored. And consumers will notice.



Our research shows that corporations are more trusted than the government. If they're able to do positive things when politicians can't, it may help break through that doomerist mindset.

That said, greenwashing is a great example of where noise from brands is actively harmful. Over a third in the US would be discouraged from buying from a brand if they made false sustainability or environmental claims.

Often brands don't actually mean to make false claims, but **miscommunication** between marketers and sustainability champions can cause the same result.

News publishers also have a part to play. With so much doom and gloom in the media, it's unsurprising that it's impacting people's outlook, and the climate beat will require a different approach. Research has **shown** that readers value more solutions-oriented journalism where the environment is concerned.

14

Consumers want brands to have a moral compass

% of Americans who want brands to do the following



15

Brand image is king

% of Americans who say the following would discourage them from buying from a brand





Moving forward

Despite being tired of hearing about climate change, people still care. In 2023 brands and publishers will need to change tack. For brands, it's an opportunity to engage in a way that combines being eco-friendly with thriftiness, and dial back on making noise around climate change unless they can demonstrate a clear impact in what they're doing. For media outlets it's an opportunity to focus on **solutions**, not problems.

Hope isn't lost, but brands and media publishers need to recognize the problem, adapt to it, and then lead the way.



This is virtual, this is me

How identity will shape the future
of the metaverse in the US



by
TOM HEDGES



If you could be anything in the world... what would you be? Would you be the same person that your colleagues see at work, the person your friends know, or something completely different?

Since the internet was created, users have been able to experiment with their identity, and express themselves in ways that they previously couldn't (or wouldn't) in the real world. Usernames, bios, personas, and avatars have all been important ways for people to manage their online identities, whether it's altering them slightly, or indulging in wild experiments.

In 2023, we'll see this enter a new stage, as increasingly popular virtual worlds like Fortnite and Roblox provide more tools for identity play. Drawing on some clues from internet history, and insights about the people who currently use these spaces, here's what you should know in the year ahead.



If you could be anything in the world... what would you be?

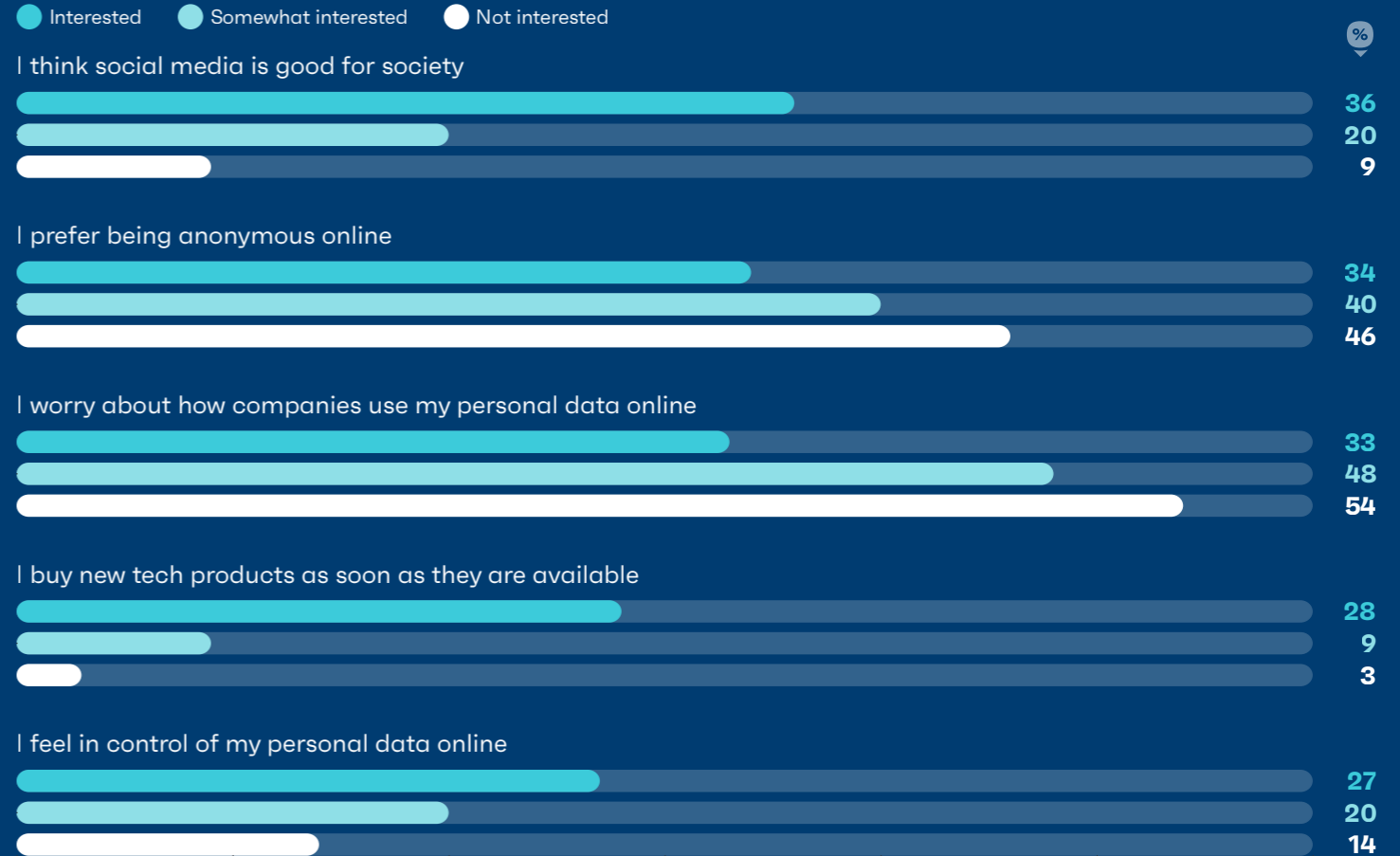


A brief history lesson

Let's start by setting the scene. A purple-haired character with fairy wings dances in a nightclub on a virtual island, created to promote a TV show based in Los Angeles, known for its pioneering portrayal of LGBTQ+ characters. Soon after, **the island** will host a sponsored Pride event, and the show will eventually go on to win an Emmy. The show is **The L Word**, and the year is 2007.

Disinterest in the metaverse stems from a lack of confidence online

% of Americans who are interested/uninterested in the metaverse and say the following describe them



GWJ Zeitgeist March 2022
 2,029 Americans, of which 1,358 are interested in the metaverse, 456 are somewhat interested, and 215 are not interested, aged 16-64

The program forged a unique connection with its loyal and passionate fan base, moving beyond the traditional television experience, and embracing the possibilities of virtual worlds. It may be old in internet terms, but how its community operated is extra relevant now, with community being a standout motivation for those interested in the metaverse.

Compared to the average American, those interested in the metaverse are over 3x more likely to buy products/services to access the community built around them, and over 4x more likely to buy tech products as soon as they're available. They're a confident, affluent,

and risk-taking group who want to be the first to try new things. But for these reasons, attention needs to be paid to how the metaverse is beginning to take shape.

These interested Americans may be the first to take virtual steps in the metaverse, but they don't represent all those who actually prefer to spend their time online, rather than in the real world. Consumers in that latter group are more likely to be low income, part of the LGBTQ+ community, and have a physical disability. Success in 2023 means ensuring their needs are catered for in virtual spaces.





New audiences in the metaverse

Although no “true” metaverse exists yet, online 3D spaces are popular and already proving fruitful for brands to play around in.

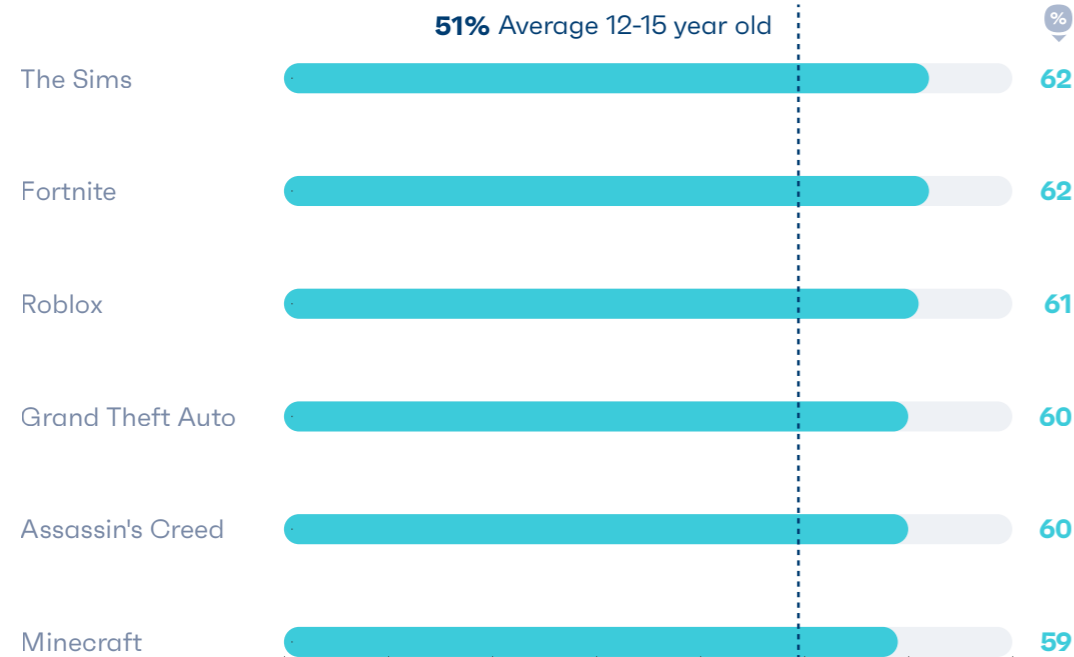
In proto-metaverses like Roblox, you can display your identity through avatars and props of varying sizes and types. You can express, highlight, and develop particular interests and life experiences. It’s what **Second Life** brought to our attention all those years ago, where users could design and build their own experiences within a virtual world. The benefit of these environments is their open social

design, where personal and group identities can draw on fantasy as much as reality.

American LGBTQ+ consumers stand out for the importance they place on diversity and inclusion, equal rights, and clothing/fashion choices. The LGBTQ+ communities on Roblox are some of the latest places to offer a safe space, with the combination of **anonymity and reinvention** that was less accessible in earlier web technologies. These spaces can act as a flexible testing ground for exploring all the traits that define who we are.

Teen players in virtual worlds have stronger social values

% of teen players of the following games who say protecting people from bullying is important to them



GWI Kids Q1 2022 1,025 American teens and 862 gamers aged 12-15

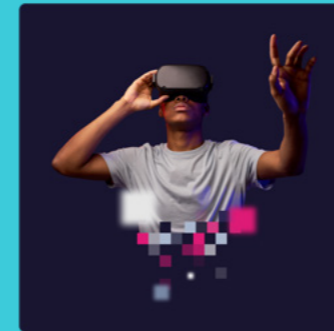
This is virtual, this is me

17

Deep dive into Web3

Feature

Need to nail your brand's NFT launch, or figure out your metaverse strategy? Here's our gamified rulebook.



Unlock the feature

Roblox has seen some of the biggest growth of any game played by kids in the US. Year-on-year, the number playing is up 56% among gamers aged 8-11, and 54% among teenagers. It's little surprise brands are investing early and investing big in Roblox experiences and assets, fighting for the attention of this generation. But their intentions must be genuine, as this audience is not only highly engaged, but value-focused.

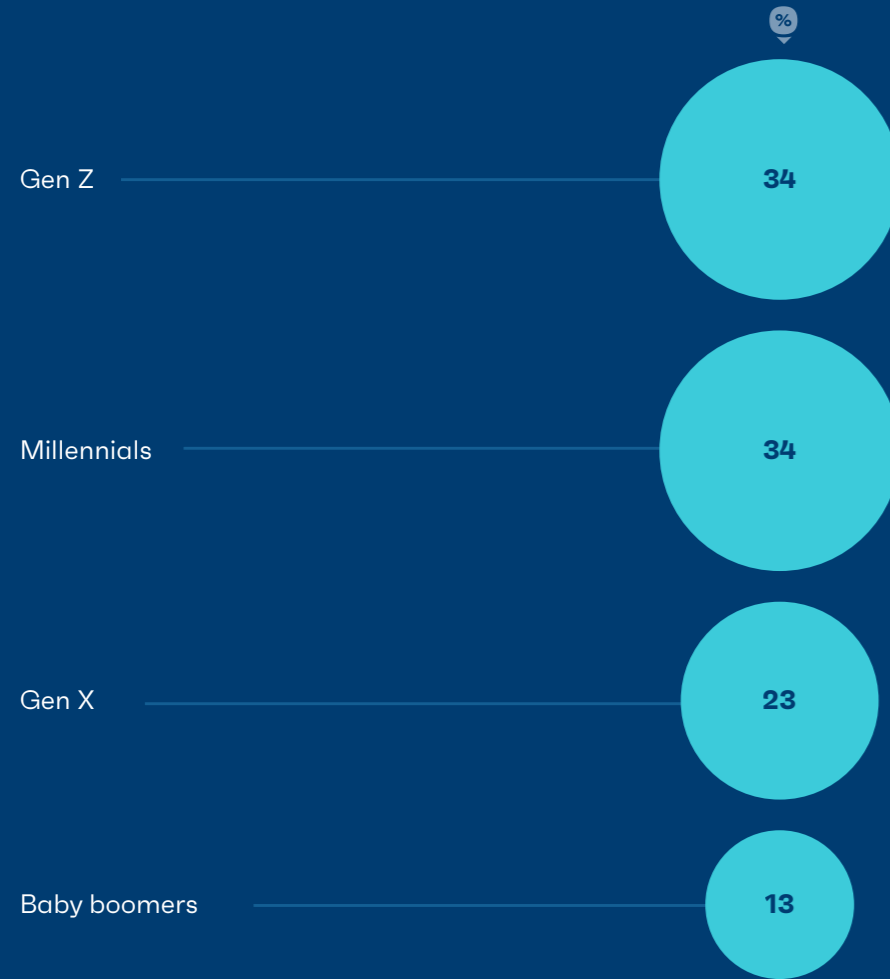
While 3 in 10 teen Roblox gamers say having the latest fashion/trends is important to them, they stand out for saying helping people is important, and are over 20% more likely to say protecting people from bullying is important. So while being on trend matters, creating experiences and products with wider benefits will go a long way in keeping them on side.

It's what the likes of American Eagle have started to drive home. As of August 2022, its Roblox presence has seen **30 million unique visitors** – a figure higher than the population of Texas. For brands, it's about getting in front of users exploring these spaces, but by leading meaningful change.

Demand for avatars and personalization is high

18

% of Americans in each generation who are interested in creating an avatar



Appearance over apparel

Understanding users' avatars may reveal a lot about the individual. Each represents a different part of the person's personality and lifestyle, whether it's a mood, an interest, a social role, or their beliefs and values. For Americans, customization is key to this, and it's a main motivation for users to participate in the metaverse.

In fact, 62% of potential metaverse users say using the space to browse or shop for products is of interest to them, with clothing/outfits their priority, ranking above art/collectibles, real estate, and cosmetics.

This demand has been seen before. At its peak, Second Life had a vibrant economy, with **millions of US dollars** in monthly transactions and **230,000 user-made items** being bought and sold each month. However, what brands need to consider in 2023 is that although interested Americans want to

browse for products in the metaverse, when it comes to identity play, it's not their priority.

Three-quarters (76%) of Americans who are interested in creating an avatar claim they'd like to customize its physical appearance. It's the country with the most interest in 12 markets studied, and a lesson learned from early proto-metaverses, where **creating an avatar** was serious business.

The stakes are too high in the metaverse to exclude representation from the equation, and its future will fundamentally change the way we interact with brands.

Selling a branded t-shirt in a virtual world isn't enough, but giving users the tools to become whoever they want to be, with the freedom to change, is the real currency.



US consumers place customization high on their priority list

19

% in each country who are interested in avatars and in customizing the physical appearance of their character



For Americans, physical appearance takes priority over apparel in the metaverse, with allyship becoming the new hallmark of these spaces

GWI Zeitgeist August 2022 5,581 consumers interested in creating an avatar aged 16-64 in 12 markets



Looking forward

Americans are taking advantage of the growing number of options to experiment with their identity online. Proto-metaverses provide immersive experiences for interaction and experimentation, and for many, playing with their identity online is a new form of entertainment.

What was first seen in chat rooms like **The Palace**, then popular virtual worlds like **Second Life**, is how users adopt online personas to better understand their own identity. With the huge growth of Roblox, especially among kids, proto-metaverses are bringing this to the masses. The development of these

virtual worlds means there are more communities and opportunities for customization, especially among an audience of Americans who see strong social values as table stakes.

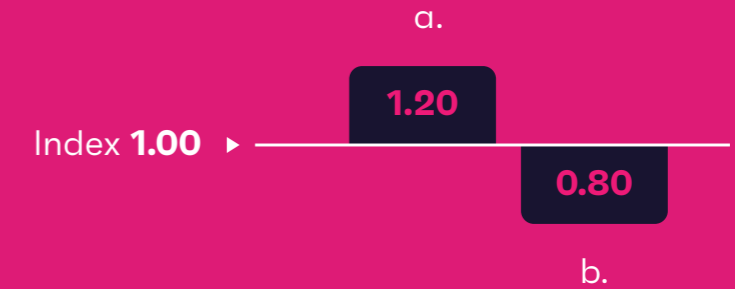
Ultimately, communities are complicated environments that need some guidance to provide them with identity and purpose. Their fate will be decided by the efforts of software developers, and the influence of brands - but most of all, by the community itself. In 2023, the focus needs to be on the safety of these spaces and on creating worlds where all feel welcome, regardless of which version of themselves they choose to present.

Methodology & definitions

This report mainly draws on figures from our GWI USA study, which represents American internet users aged 16+. To ensure our sample is representative, we set quotas on age, gender, race and ethnicity, income and region. Each year, we interview over 80,000 respondents over 4 waves of fieldwork, representing approximately 240 million American internet users. Fieldwork takes place in two parts, with respondents first completing a

40-minute, online survey before being asked to complete a 20-minute follow-up survey focused primarily on CPG and healthcare. Approximately 50% of respondents complete this follow-up survey, meaning that the sample sizes presented throughout this report may differ as some questions are asked of all respondents while others are only asked of a subset. For more details on our research check out our [Help Center](#).

Defining index



Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of “1.20” (a) means that a given group is 20% above the average US consumer, and an index of “0.80” (b) means that an audience is 20% below the average US consumer.

Want to know what Americans think, feel and do?

Every business has questions about its audiences; GWI has the answers. Powered by consistent, US-centric research, our platform is an on-demand window into their world.



[Book your demo](#)



Appendix

- 1 In the next 6 months, how do you think the following things will change? (Personal/household finances/US economy - Get better)
- 2 Which of these are most important to you in a workplace?
- 3 Which of these statements do you agree with?
- 4 Which of these things are you interested in?
- 5 Which of these things do you worry about?
- 6 Which of these, if any, best describe why you listen to audiobooks/music/podcasts/talk radio?
- 7 Which of these music types do you enjoy listening to?
- 8 Which of the following types of shows/movies do you enjoy watching?
- 9 Which of the following would you most like to see employers do to support employees?
 - What would you like to see brands do in their Pride month campaigns this year? (asked to respondents who believe that brands should support LGBTQ+ causes)
 - Which of these, if any, do you think brands/companies should be doing to support the Black Lives Matter movement?
- 10 Which of these things do you worry about?
- 11 Which of these things do you most want brands to do?
- 12 To what extent do you agree or disagree with the following statements? (Strongly agree/Slightly agree)
- 13 Which of these things do you worry about? (Climate change) • How do you think the following will change in the next 6 months? (The environment/climate change - Get worse)
- 14 Which of these things do you most want brands to do?
- 15 Which of these would discourage you from buying from a brand?
- 16 Which of the following describes you?
- 17 Which of these are important to you? (Protecting people from bullying)
- 18 How interested would you be in creating an avatar in a metaverse? (Fairly interested/Very interested)
- 19 Which of these would you be interested in customizing in the metaverse? (Physical appearance of the character e.g. hair color)

GWI.