Foresight Factory

Trending 2023

The key trends and mindsets impacting
the year ahead and beyond

Contents

Introduction

Welcome to Trending 2023.

Consumers are entering 2023 in a rebellious mood. They are questioning established norms, defying authority and side-stepping received wisdom across many areas of life – from wellbeing to shopping to identity-building. They want to take back control in a volatile and uncertain world and to rewrite the narrative on their own terms.

In this year's Trending report, we reveal how rebellion will drive consumer decision-making across four key mindsets in 2023 and the decade ahead: the rebellions against perfection, authority, surveillance and restraint. Using our unique methodology which consists of analysing three new waves of proprietary consumer data,

tracking signals of commercial change and scenario-building, we explore how brands across multiple sectors can use rebellion as a framework for action and capitalise on the new and established trends coming to the fore.

The principles of strategic foresight are at the heart of our report, with its focus on signal-tracking, scenarios, business application and easy shareability within client organisations. We understand that in a complex and fast-moving world, strategic foresight has never been more important, and we look forward to building a more prosperous future for clients in 2023 and beyond.

Rebellion against perfection

Mindset 1

Sleek minimalism and filtered perfection have long been the ultimate aesthetic aspiration touted by brands, influencers and consumers, with social media platforms like **Instagram** disseminating this idea on a global scale. But as **TikTok** continues to grow, bringing with it the notion that authenticity and rawness are the new cool, consumers are questioning established conventions around beauty and style, which are often lacking when it comes to inclusivity and accessibility. From goblin mode and feral girl summer to over-the-top maximalism and unapologetic messiness, nothing is off limits in this new era of anti-perfection. The goal is not to be a better you, but the real you – whatever that looks like.

Seeing Beyond: How will the rebellion against perfection unfold over the next decade?

Below, we lay out three possible futures of the rebellion against perfection based on weak signals, critical uncertainties and the ongoing impact of structural drivers:

This image was generated by an AI illustrator using the prompt "Person taking a selfie who has a sense of style that is cluttered, chaotic, unfiltered, messy." It represents our central scenario for the rebellion against perfection.

Credit: Midjourney

Central scenario (the most plausible future in 2033):
Consumers aspire to be (mostly) raw and unfiltered.

Wealth inequality, war and climate change continue to loom as macro threats, but not enough to disrupt the everyday lives of most. As Gen Z gains buying power and cultural sway, their sensibility swings mainstream cool away from minimalism and towards comfort with visual clutter. With self-expression of all kinds, IRL and online, poised and polished are out; relaxed and realistic are in. Even though real-time captures of everyday moments are the norm on social, users still find aspects of their own appearance they wish to change. So while conventional beauty standards are being challenged and what's considered pretty grows more inclusive, beauty tweakments are also on the rise, anti-ageing remains a dominant drive (particularly as older consumers remain healthier longer), and pretty privilege survives. Brands navigate the precarious path between authentic and aspirational by ceding more control of messaging to influencers and subcultures.

Extreme rebellion:

Chaos and clutter define aesthetic self-expression in a world in crisis.

In many places, rebellion against perfection is energised by the effects of climate change, and persistent political and economic instability. As perfection feels unattainable in a world out of control, people abandon the effort, dovetailing with rebellion against restraint, explored below. Looking sweaty? It's a historic high temperature outside. House cluttered? The cost of living makes any home decor update a luxury. In fact, showing that one doesn't have it all together now has a social and moral dimension; it preaches the need for dramatic action from businesses and governments, and brands must fight even harder for the physical (and mental) wellbeing of their customers.

Reversal:

The strategically self-restrained dominate a polished, buttoned-up world.

Letting it all hang out was a brief moment in time; a post-pandemic high when consumers freely shared their every moment on platforms run by Big Tech companies. Now, international rivalries discourage data-sharing across borders, and cyber attacks have revealed mountains of granular data about millions. And for over a decade, many who spontaneously express themselves in the digital realm (where nothing is ever truly deleted) have been "cancelled" or publicly shamed.

The fear of social backlash and employers finding one's profile ahead of a job interview dissuades many from casually sharing their true thoughts and feelings with the world. It's considered wisest to conform to a standardised set of values, so whatever does go out is highly curated and carefully considered.

On top of this, the threats of climate change and political instability mean that any control consumers can exercise is welcome. Investment in aesthetic capital has become more affordable and accessible to all, as has the capability to change looks digitally, like through dynamic, AI-powered photo and video filters.

New Trend: **Unapologetically Me**

Embracing individual style and choices in defiance of perfection and sameness

Consumers are expressing their true selves. This is enabled by a growing number of popular platforms. The culture of TikTok favours filter-free posts that foreground flaws and all, and the growing platform **BeReal** actually demands it, not allowing any edits to photos but only real-time capture and posting. The appeal of these platforms points to a larger consumer attitude: appearances don't matter like they used to. More global consumers *disagree* with the statement "I feel pressure to look good all the time" than agree: 38% vs. 31% (source: **Foresight Factory**, 2022). If constantly maximising glamour is not a priority for consumers, sectors that sell with sleek presentation – from beauty and fashion to media and homewares – are challenged to adapt.

Being authentic takes different forms – and courage. One way this trend manifests aesthetically is through bad taste, going over the top (OTT) and living out the anti-minimalist motto that "more is more". But while colourful personalities are on the leading edge of this trend, most people aren't so loud and proud. Being even *a little* offbeat is true to this trend (and oneself) too. Brands can help consumers, especially younger ones, to overcome their inhibitions: 51% of British Gen Z agree that "to 'fit in' in social situations I often feel I can't be my authentic self". At the same time, 69% of Gen Z globally feel the need to be "just that bit different from others in the way I express myself" (source: **Foresight Factory**, 2022).

38%

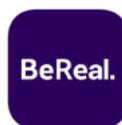% of global consumers who say that they don't **feel pressure to look good** all the time, vs. 31% who do

Source: Foresight Factory, 2022

21.6 million

Number of **monthly active BeReal users** in July 2022, vs. 921,000 a year before

Source: Apptopia, 2022

69%

% of Gen Z who feel the **need to be just a bit different** from others in the way they express themselves

Source: Foresight Factory, 2022

Energised Trend: **Tackling Taboo**

Normalising stigmatised topics and confronting hard truths

How is Tackling Taboo energised in 2023?

Rebelling against perfection is a battle against stigma. And enthusiastic destigmatisation means praise of what can be considered less-than-perfect, like **Miss England** contestant **Melisa Raouf** proudly competing without wearing makeup – the first contestant to ever do so. But being evasive or lying about actively working to improve your appearance is also being challenged, such as by **Joe Jonas** openly discussing how he uses injectables

in his face. Since consumers feel freer to look however they want to, they are now also speaking more freely about it – there is no more fear of oversharing. 3 in 5 (59%) global consumers agree "it's healthy for me to talk about difficult subjects", and 7 in 10 believe that "people should try to talk more openly about difficult subjects to make them less taboo" (source: **Foresight Factory**, 2022).

Belief that people should talk more openly about difficult subjects

% who agree that people should try to talk more openly about difficult subjects to make them less taboo

Legend: ■ Disagree strongly ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Agree strongly
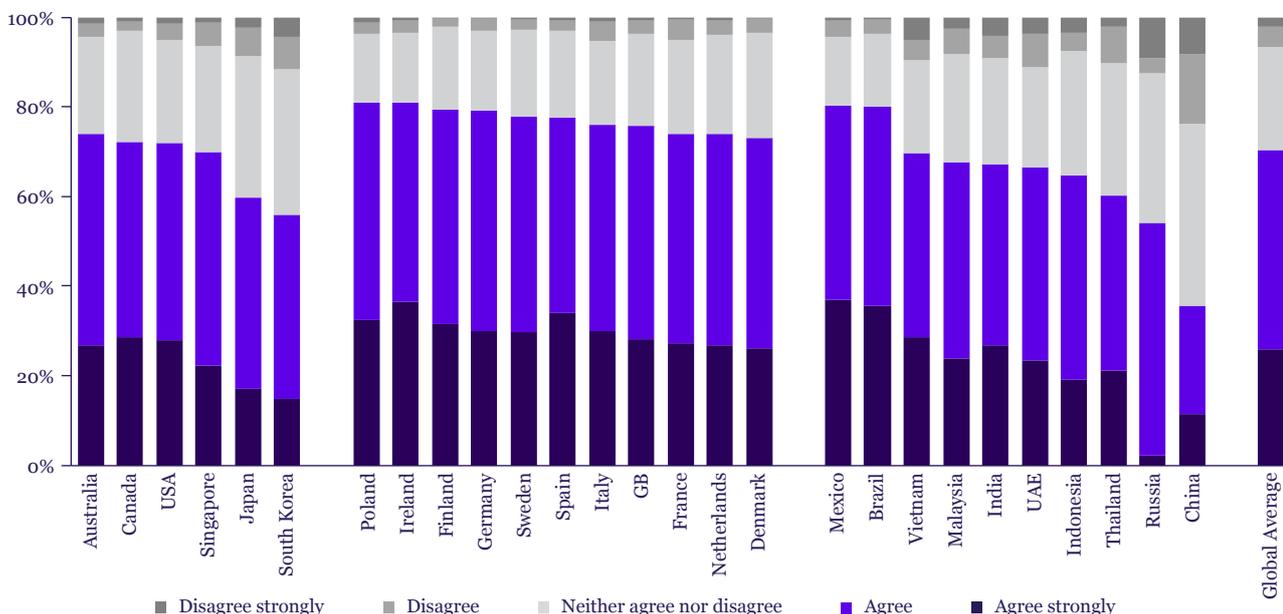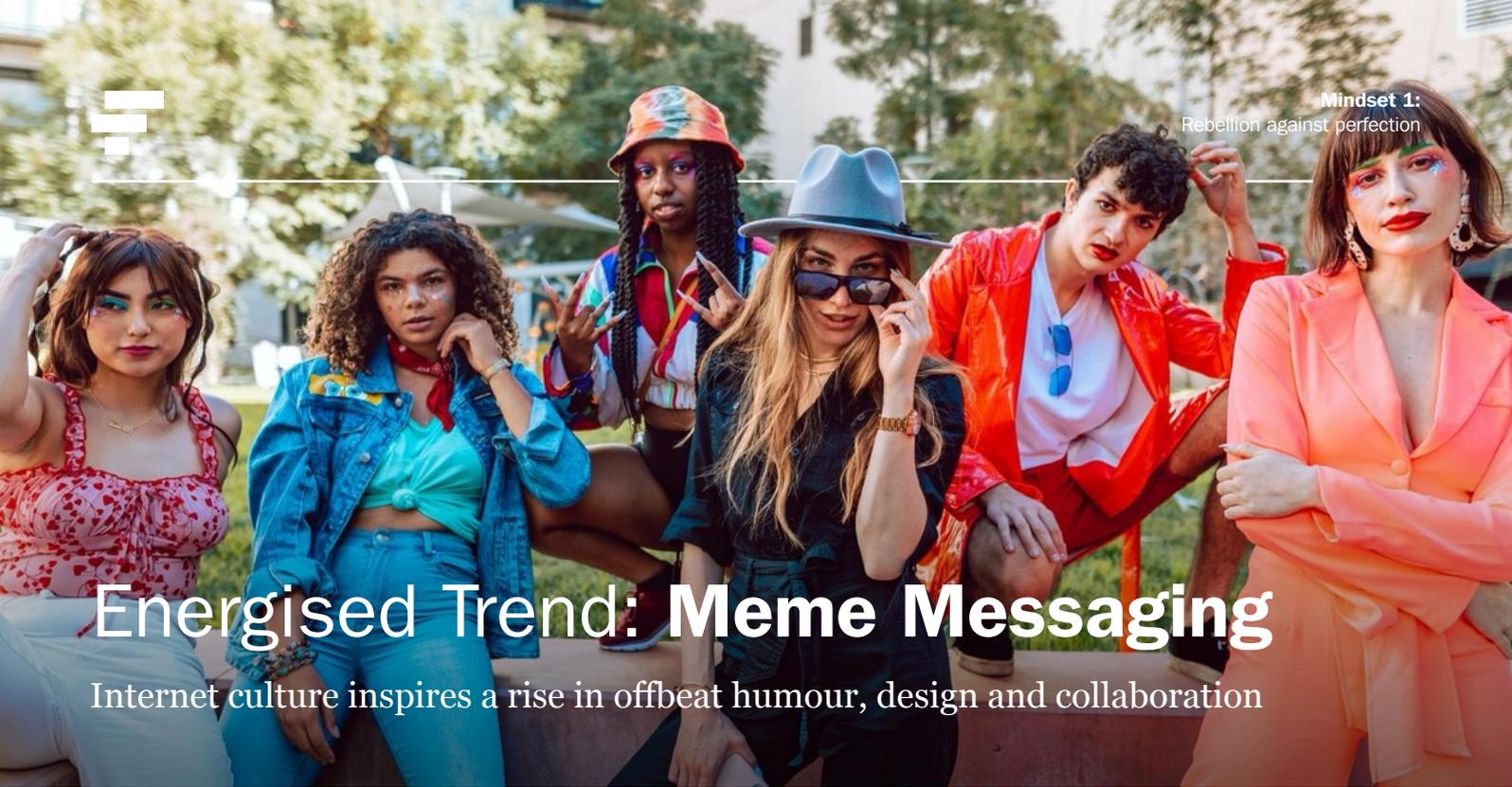
Energised Trend: **Meme Messaging**

Internet culture inspires a rise in offbeat humour, design and collaboration

How is Meme Messaging energised in 2023?

Memes and irony undercut perfection at every turn. Highly edited and polished imagery is ripe for being tweaked and twisted into unflattering and humorous forms. 45% of global consumers like brands and companies that don't take themselves too seriously, and half (48%) of global consumers say that when they communicate online with a company, they don't mind them using GIFs, memes or emojis in their replies. 2023 should see a steady increase

in the volume and intensity of casual communication and irreverent activity as userbases for platforms like TikTok continue to balloon. 39% of global consumers (63% of Gen Z) use TikTok at least monthly in 2022 (source: **Foresight Factory**), and the app is predicted to have 1.8 billion monthly active users by the end of the year (source: **Demandsage**).

Openness to brands using GIFs, memes and emojis

% who agree the statement "When communication online with a company, I don't mind them using GIFs memes or emojis in their replies"
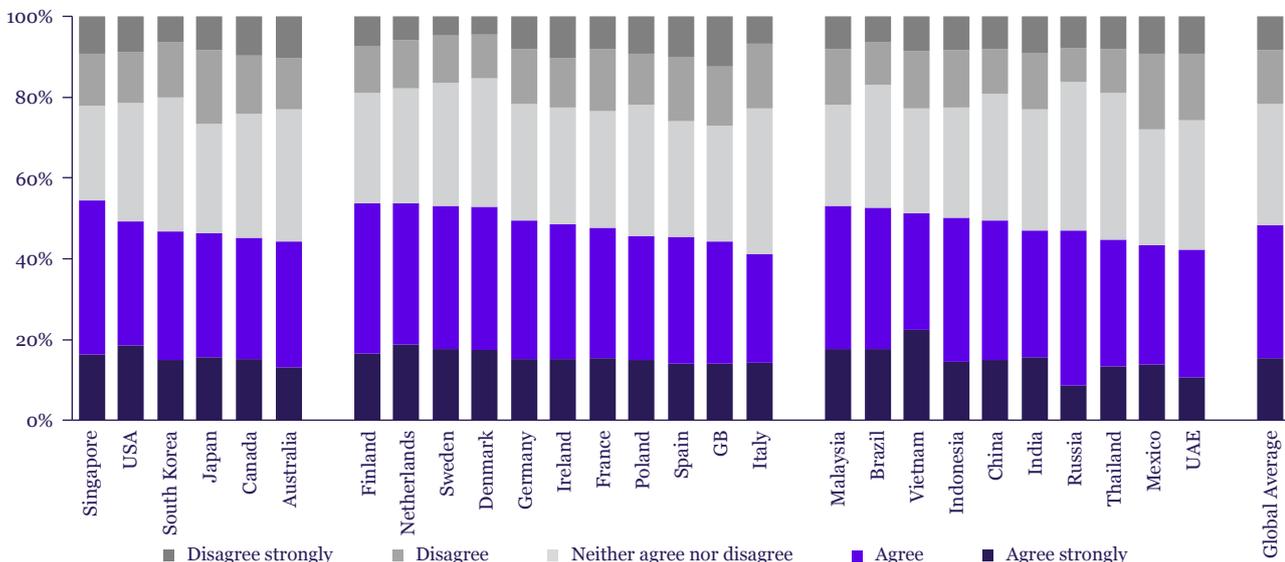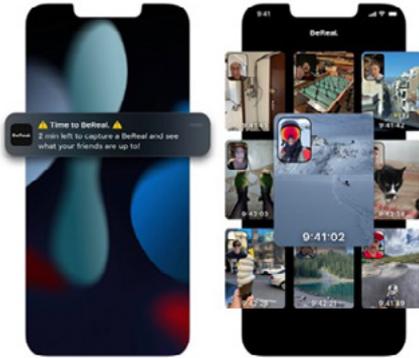

Source: Foresight Factory | Base: 585-3722 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Rebellion against perfection:
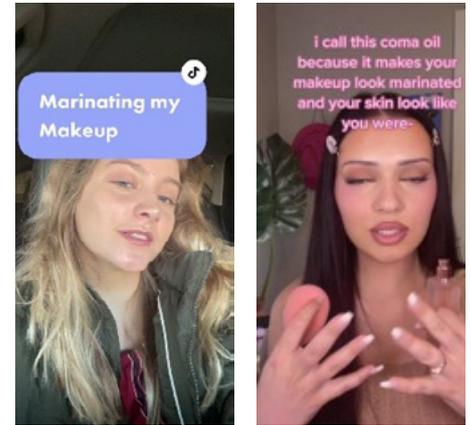## Case studies

BeReal

The social platform prompts users to share photos at random times each day and doesn't allow edits.

Very Famous Magazine

This style blog was designed to look like an early 2000s **GeoCities** site, not optimised for mobile.

Marinated Makeup

TikTok videos related to this beauty trend have over 50 million views. It is an anti- "clean girl aesthetic" where makeup is meant to sit for hours on the face.

How to act for 2023

Promote open conversation with anti-perfection advocates as well as those striving for conventional beauty standards.

This is about breaking down the stigma of talking about personal beauty goals. Some may favour improving skincare rather than makeup regimens; others want regular non-invasive procedures to achieve their desired appearance. There will be proponents of both, and opening the conversation to all will help consumers feel more comfortable to look the way they want to look – without feeling judged.

Play up informality on social to capture Gen Z.

TikTok is the dominant platform for this generation and lends itself to candid and quirky self-expression. Adapt your image and tone to meet the mass of playful and light-hearted users. Don't bend at the expense of being inauthentic. Messiness might not suit a premium and luxury positioning, for instance. But consider relaxing your comms, whether that's just using emojis in copy or inviting TikTokkers to remix your brand assets.

Empower your customers to use your products in any stylistic configuration they wish.

Allow customers to tailor products to their unique aesthetic and identity, recognising that there is no one right way to enjoy things. This takes personalisation to its ultimate end, where no standard form needs to exist. Complete flexibility and freedom to mix, match and merge is part of a world where perfection is in the eye of the beholder and stylistic pluralism is celebrated.

Rebellion against authority

Mindset 2

The systems that govern our world – political, economic, legal, corporate and cultural – are being called into question amid mass distrust and disillusionment. Many consumers feel let down by established structures like capitalism and democracy, which they see as broken, exploitative or both. With the pandemic having been positioned as a chance to reflect and reset, consumers are looking to establish new norms and systems in its wake. Some are pushing for decentralisation and decolonisation, with an emphasis on collective action, while others are taking morality and authority into their own hands.

Seeing Beyond: How will the rebellion against authority unfold over the next decade?

Below, we lay out three possible futures of the rebellion against established authority based on weak signals, critical uncertainties and the ongoing impact of structural drivers:

This image was generated by an AI illustrator using the prompt "People exchanging goods and services using smartphone while ignoring advertising billboard." It represents our central scenario for the rebellion against authority.

Credit: Midjourney

Central scenario (the most plausible future in 2033):

Lack of support from established authority leads to the growth of decentralised dependency.

After the slow recovery from the economic difficulties of the 2020s, there is widespread consumer disillusionment with the ability of governments and other authority figures to get things done, with the media also widely distrusted.

Stagnating growth rates in many developed parts of the world mean governments are no longer able to provide large support packages such as those seen during the COVID-19 pandemic. Instead, the private sector must increasingly step in to protect and support their customers, which is a central part of their ESG activities.

Through necessity and a desire to feel empowered, more and more consumers are joining grassroots community support groups, to provide practical and emotional help for themselves and others, thanks to tools such as DAOs, peer-to-peer solutions and community investing. Some of this informal activity will escape taxation and regulation by

central governments. Thanks to medical advances, faith in scientific progress remains strong, though the high cost of new treatments has led to growing healthcare inequality. Alternative truths and conspiracy theories still thrive in the margins, with the metaverse offering virtual communal spaces for like-minded individuals around the world. Global migration has accelerated due to climate change making more regions uninhabitable, which means that societies around the world have become more diverse than ever. This is increasingly reflected in leadership roles, and as a result diversity and inclusion issues have become a core part of decision-making for every business.

Extreme rebellion:

Undermined trust in societal leaders leads to widespread rejection of authority.

The inability of governments to cope with an unprecedented economic breakdown has resulted in a complete lack of trust in them. Many consumers are openly disdainful of authority, with non-payment of bills and taxes widespread. Moreover, faith in experts and science was undermined when a link was proved between COVID-19 vaccinations and a number of health conditions, vindicating the anti-vax movement. Meanwhile, the rush to decarbonise in the 2020s, with renewable alternatives proving insufficient, has led to frequent energy blackouts.

Many consumers are susceptible to conspiracy theories, with mainstream news media largely ignored in favour of more extreme voices. The acceleration of global migration due to climate change has also led to exacerbated tensions in many markets, with resentments between groups frequently spilling over into violence. Businesses struggle in such an environment, having to contend with industrial unrest, supply-chain difficulties and intermittent energy.

Reversal:

In the face of multiple threats, consumers resort to complete compliance.

The multiple challenges faced by humanity in the last decade – encompassing climate breakdown, and another, deadlier pandemic – caused many consumers to realise they have no option but to pull together and submit to authority. This was capitalised on by many governments around the world, which felt that the only alternative to strengthening their grip on society was anarchy. Therefore, rather than the steady march towards liberalism that many in the West expected, the model seen in more authoritarian nations around the world has become entrenched there and even spread to parts of the world such as Europe.

Consumers who grew up under mass surveillance by technology and obeying strict COVID-19 rules are relatively unfazed by this and are willing to submit to an authority that they feel is protecting them from existential threats. Brands must adhere closely to burgeoning government regulations; in return, they can gain official accreditation and enjoy access to rich data on their customers gathered centrally.
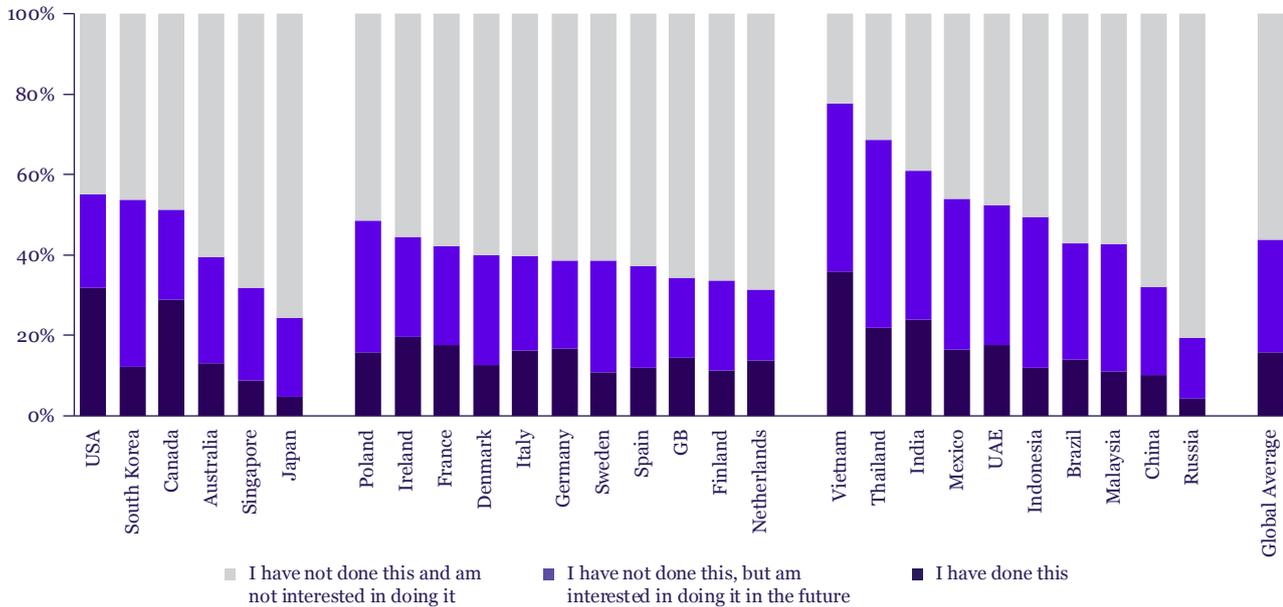
New trend: **Moveable Morality**

Questioning centralised authority in favour of personal
judgements about what is right

Consumers doubt the wisdom of traditional authority figures. One of the symptoms of a polarised society is that it is increasingly difficult for governments and other institutions to command the respect of a majority of citizens. One prominent example of this is the Supreme Court in the US. Concurrent with its decision to overturn the 1973 Roe v. Wade ruling prohibiting restrictions on abortion, public trust in the organisation fell to a historic low, with only 25% of Americans expressing confidence in it (source: **Gallup**). At the same time, consumers around the world are protesting the policies of their governments, from the yellow vest movement in France and dairy farmers in the Netherlands, to truckers in Canada and uprisings in Sri Lanka. The unprecedented increases in energy bills in the UK, meanwhile, gave rise to a **Don't Pay** movement of consumers pledging to refuse to pay their bill when a price rise kicked in on 1 October.

Some engage in what they see as justified rule breaking. The COVID-19 pandemic saw many governments limiting the freedom of their citizens to an unprecedented degree, and while most did comply, our consumer research found that 24% in GB and 26% in the US chose not to follow some COVID-19 guidelines. More broadly, 62% in GB and the US agree it's sometimes necessary to bend the rules, while 71% in GB and 70% in the US agree you can be a good citizen without following every rule (source: **Foresight Factory**, 2021). Against this backdrop, some companies are helping consumers to circumvent or change laws that they or their customers may feel are unjust. For instance, brands including **Bank of America, CVS Health** and **Kroger** have pledged to cover travel costs for their employees who need to leave their home state for an abortion. Consumers and brands alike are also pushing boundaries when it comes to topics such as drug use. For instance, research from August 2022 shows that for the first time in the US, more consumers smoke marijuana than tobacco cigarettes (source: **Gallup**), while a growing body of research explores the medical applications of the psilocybin found in magic mushrooms. Meanwhile, the proliferation of products containing CBD have revolutionised attitudes towards cannabis around the world.

Uptake and interest in CBD food and drink

% who have consumed or are interested in consuming a CBD (cannabidiol) based food or drink

Legend:
- ■ I have not done this and am not interested in doing it
- ■ I have not done this, but am interested in doing it in the future
- ■ I have done this

Source: Foresight Factory | Base: 611-3885 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

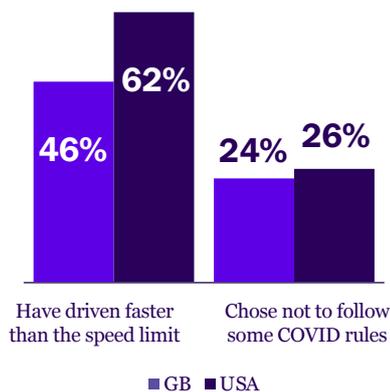### Majorities are not averse to bending the rules

GB 62% | USA 62%

% who agree that **it's sometimes necessary to bend the rules**

Source: Foresight Factory, 2022

Rule-breaking is admitted

Have driven faster than the speed limit: GB 46%, USA 62%
Chose not to follow some COVID rules: GB 24%, USA 26%

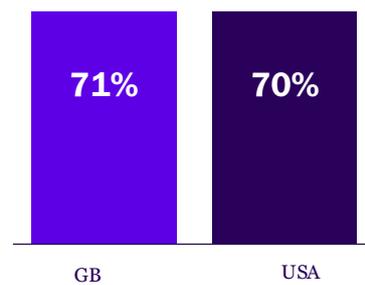■ GB ■ USA

% who admit to having **broken a rule in the past**

Source: Foresight Factory, 2022

Rule-breaking does not make people bad citizens

GB 71% | USA 70%

% who agree you can be a **good citizen without following every rule**

Source: Foresight Factory, 2022

Energised Trend: **Fact Finders**

The expectation that claims should be validated
via tech and transparency

How is Fact Finders energised in 2023?

Some consumers are questioning mainstream sources of information and exploring alternative truths. This is unsurprising in a polarised world where concerns about fake news are at an all-time high. For instance, sizeable minorities of consumers say they *reject outright* the authority of the media (36% in GB and 34% in the US) and political leaders (24% in GB and 30% in the US) (source: **Foresight Factory**, 2021). Meanwhile, 10% of consumers globally *disagree* that they trust modern medicine. This rises to 21% in Russia, and 14% in the US and Poland (source: **Foresight Factory**, 2022). Big Tech and search engines are not immune, with **Fast Company** reporting that crowd-powered sources of information such as **reddit** are supplanting **Google** as a trusted source for searches. In summer 2022, Google tried to counter this tendency with their **Let's Internet Better** campaign on **TikTok** and **YouTube**, aimed at encouraging younger users to use its search tools to verify information.

Consumers seeking facts in unconventional places can come to alternative or even dangerous conclusions. Some become adherents of conspiracy theories such as **QAnon**, which at its peak was estimated to have around 4.5 million followers on **Facebook** and is reported to be staging a comeback in 2022. Consider also the anti-vax movement; it has been reported that while COVID-19 vaccine hesitancy declined at a global level between 2020 and 2021 from 29% to 25%, it actually grew in some markets – including South Africa, the US and Nigeria (source: **Nature Communications**). Meanwhile, the storming of the US Capitol by protestors on 6 January 2021 is one high-profile example of action by a counter-cultural movement, and while 65% of US consumers *disagree* with the idea that the protests were necessary, 20% agree (source: **Foresight Factory**, 2021).

Levels of distrust in modern medicine

% who disagree or disagree strongly with the statement "I trust modern medicine"
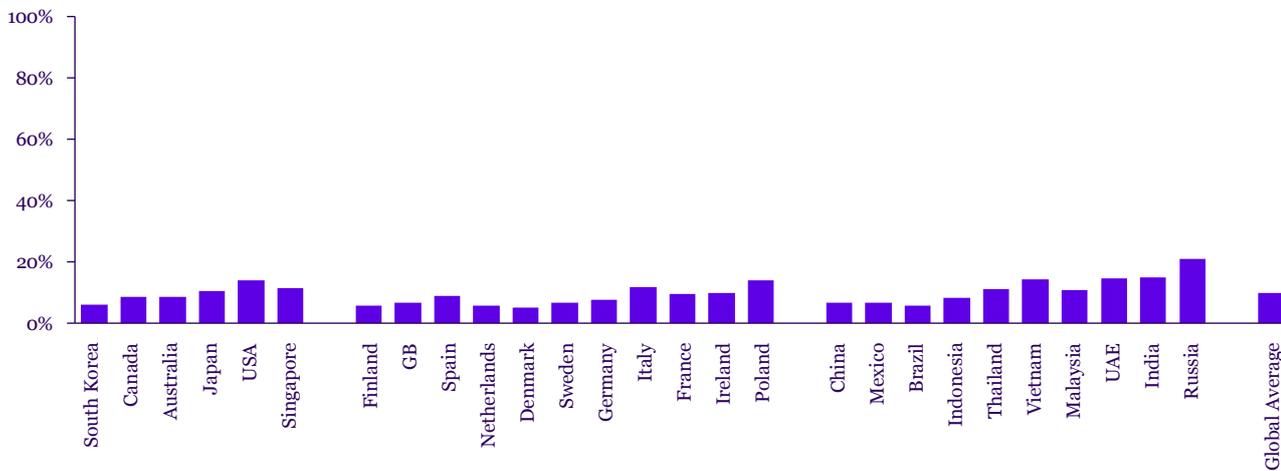
Source: Foresight Factory │ Base: 606-3804 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

The Capitol protests in the USA in January 2021 were necessary

% of Americans who agree or agree strongly that the Capitol protests were necessary
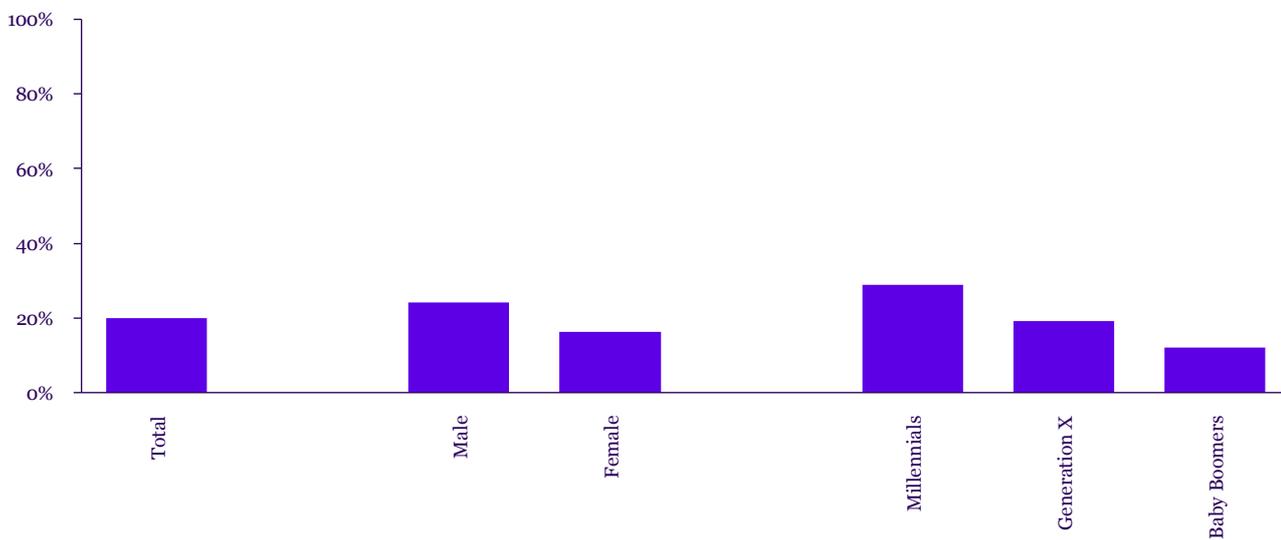
Source: Foresight Factory │ Base: 739 online respondents aged 16+, USA, 2021 May

Energised Trend: **Naked Citizen**

Facing life's challenges with limited support from the government

How is Naked Citizen energised in 2023?

Consumers expect brands to support them efficiently and effectively. While governments around the world have acted on a large scale in reaction to crises such as COVID-19, the war in Ukraine and rising cost of living, they are often slow to get things done, meaning there is a considerable role for brands and companies to play. In fact, among consumers, businesses are the most trusted major institution type, above government, the media and NGOs (source: **Edelman Trust Barometer**, 2022).

2023 will have its fair share of challenges that brands can rise to meet. When it comes to the cost of living, 22% of Brits, rising to 37% of Gen Z, agree they are considering delaying retirement in order to support their family (source: **Foresight Factory**, 2022). While government support programmes are promised to bring down the cost of energy bills, for instance, and reduce inflation, brands are also offering eye-catching initiatives. For example, UK frozen foods retailer **Iceland** announced an interest-free loans programme to help customers through the cost-of-living crisis, while in the US apparel brand **Old Navy** announced that it was pausing price hikes of its children's clothing ranges to help families struggling with the rising cost of living.
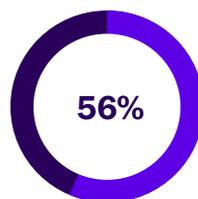
Businesses are most trusted type of institution

Media	50%
Government	52%
NGOs	59%
Business	61%
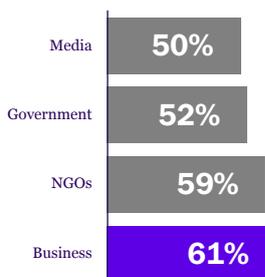
% of global consumers who say they **trust each type of institution**

Source: Edelman Trust Barometer, Global average 18+, online, 2022

Businesses are expected to act in international crises

56%

% in GB who agree **big companies have** as much responsibility as the British government **to help Ukraine** during the Ukrainian-Russian conflict

Source: Foresight Factory, 2022

Consumers act as state provision falls short

Boomers 8%
Gen Z

22% Total

37%
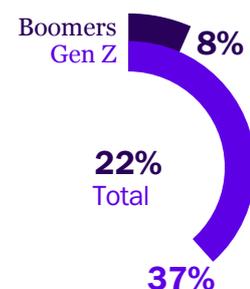
% in GB who are **considering delaying retirement** in order to support their family

Source: Foresight Factory, 2022

Energised Trend: **Peer Power**

Connected communities harness the energy of the crowd

How is Peer Power energised in 2023?

Decentralised collaboration supplants top-down support. In a context where trust in authority is depleted, and where traditional sources of support such as the state are unable to offer sufficient help, consumers are turning to one another. We saw this in reaction to the Russian invasion of Ukraine, where consumers used **Airbnb** to book stays with Ukrainian hosts with no intention of actually visiting, to give money directly and speedily to those who needed it. In reaction to the cost-of-living crisis, consumers are setting up **GoFundMe** donation pages to crowdsource contributions for staples like baby formula and groceries.

More broadly, we see growing adoption of peer-to-peer services. These include money-lending websites (from 12% in 2017 to 17% in 2022 globally), and lending services for household goods (from 12% in 2017 to 17% in 2022 globally) (source: **Foresight Factory**). Looking further out, the rise of distributed autonomous organisations (DAOs) and the development of Web3 suggests the potential for crowd-powered entities to play a more fundamental role in societies.
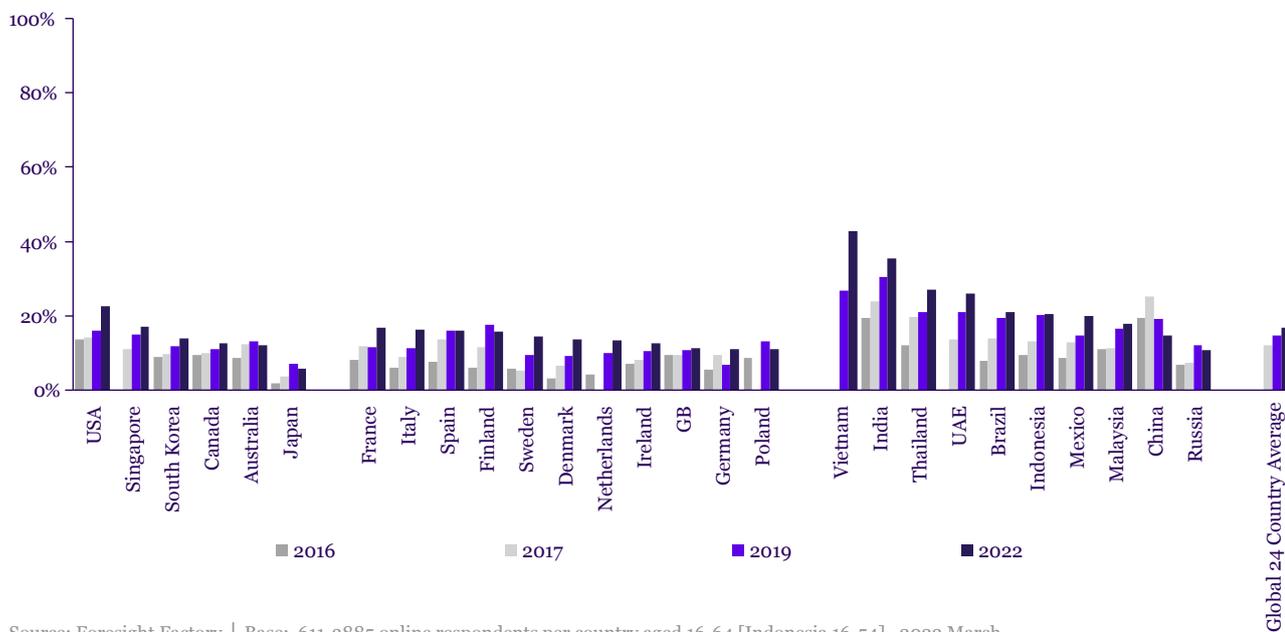
Google Trends search activity for "web3"
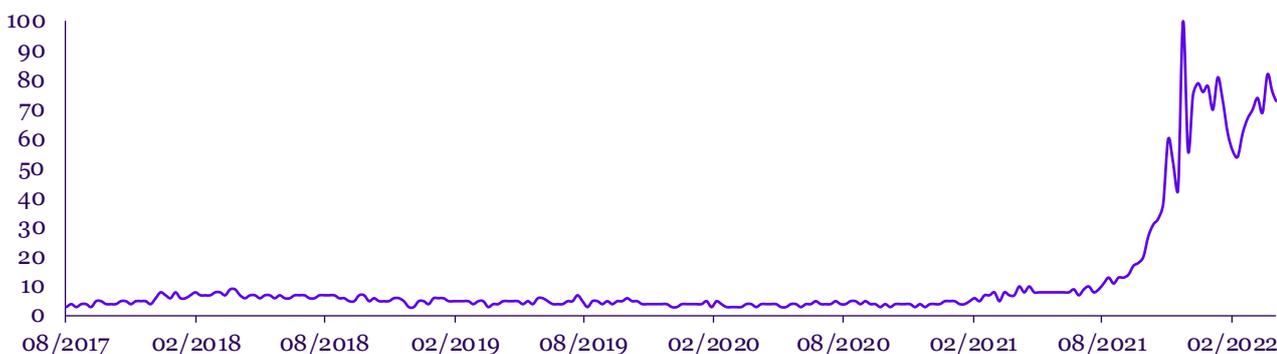
Source: Foresight Factory/Google Trends, Worldwide, 2022

Uptake of peer-to-peer money lending websites

% who have used a peer-to-peer lending website (e.g a website service that allows me to lend or borrow money from individuals without the involvement of a bank or financial institution)

Legend: ■ 2016 ■ 2017 ■ 2019 ■ 2022

Source: Foresight Factory │ Base: 611-3885 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Uptake of peer-to-peer lending services for household items

% who have used an online lending service to borrow or rent a household item for a short period of time
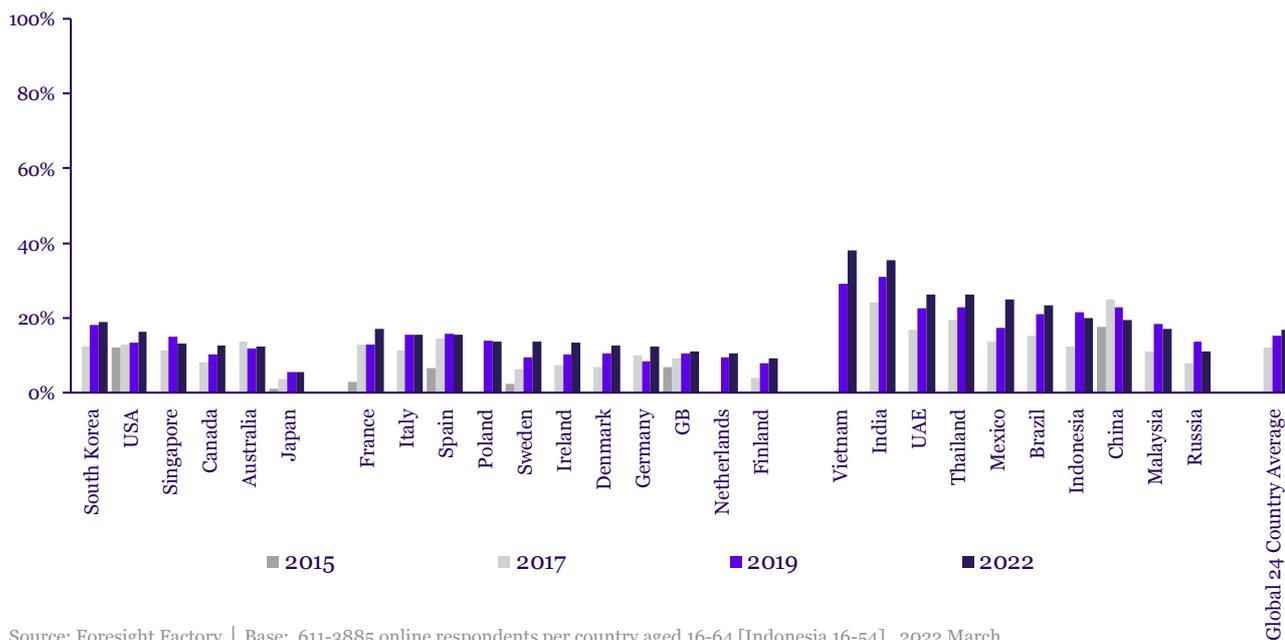
Legend: ■ 2015 ■ 2017 ■ 2019 ■ 2022

Source: Foresight Factory │ Base: 611-3885 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Energised Trend:
Diversify and Decolonise

Inclusivity evolves to encompass championing the
marginalised and redistributing power

How is Diversify and Decolonise energised in 2023?

Expect more focus on dismantling existing power structures. While representing and championing diversity has become a hygiene factor for many global brands, if this process is only superficial, it could be dismissed as empty virtue-signalling or purpose-washing. Many consumers expect more, and indeed, 45% globally agree "it's more important for brands to represent minority groups in their leadership teams than in their advertising" (source: **Foresight Factory**, 2022). In the banking space, a rising tide of anti-capitalist and impact investors aim to shift the balance of financial power into the hands of the working class, turning an extractive economy into a regenerative one. Popular **Twitter** accounts like **@CelebJets** keep tabs on private jet usage among the rich and famous, naming and shaming them at a time when consumers are reining in spending and being told to watch their own carbon footprint, while "eat the rich" has become the rallying cry for consumers fed up with the One Percent.

For some, woke culture is something to rebel against. In some circles, fighting for social justice is still seen as an act of rebellion. But with "wokeness" becoming the dominant narrative in many societies, a cohort of consumers is now rebelling against the institutionalisation of political correctness, which they see as something foisted upon them by governments and businesses. For example, in June 2022, UK bank **Halifax** announced it would be including pronouns on staff badges. This led to criticism from some on Twitter, to which the bank responded, "if you disagree with our values, you're welcome to close your account". Meanwhile, **Amazon's Rings of Power** series was met with a cascade of anti-woke criticism by consumers who took issue with the diversity in casting. It's an area to keep an eye on, especially given that 12% of global Millennials have boycotted a brand for commenting on social or political issues (source: **Foresight Factory**, nine-country average, 2022).

Agreement about the importance of representation in leadership

% who agree with the statement "It's more important for brands to represent minority groups in their leadership teams than in their advertising"

■ Disagree strongly   ■ Disagree   ■ Neither agree nor disagree   ■ Agree   ■ Agree strongly
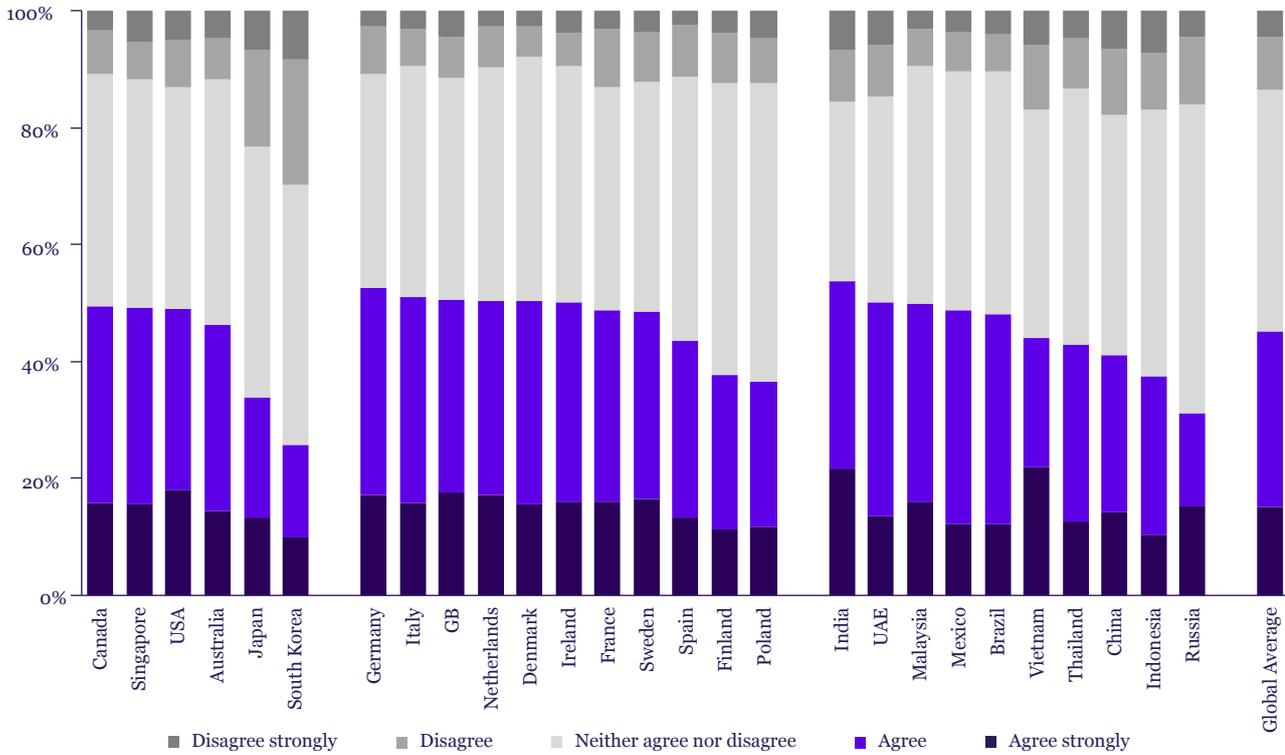
Source: Foresight Factory | Base: 611-3885 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Boycotting brands for getting political

% of global consumers who have stopped using a brand in the last 12 months because it commented on social or political issues
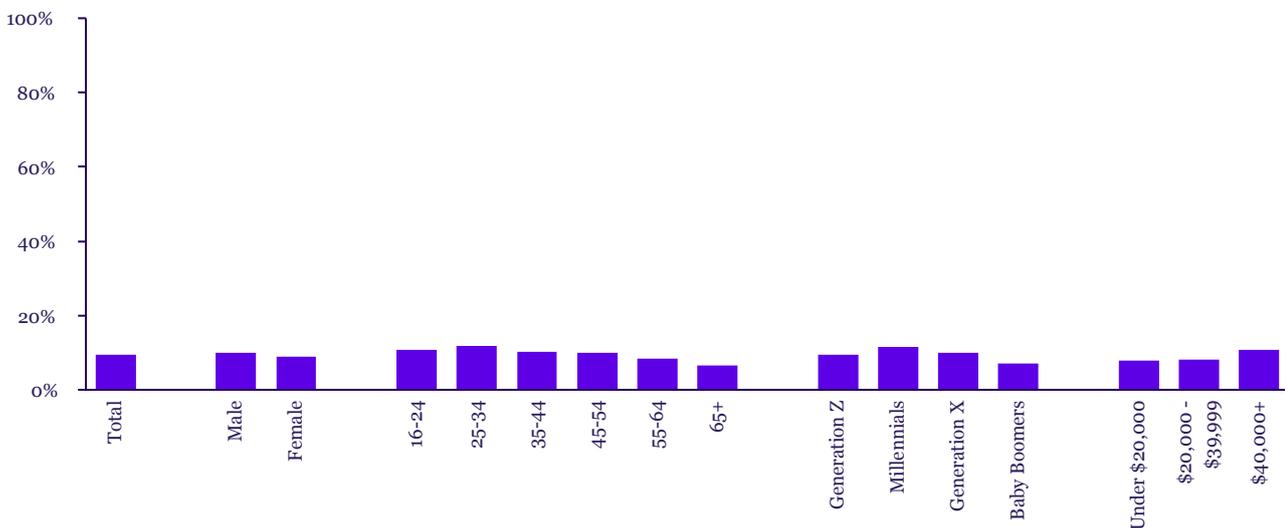
Source: Foresight Factory | Base: 11000 online respondents aged 16+, Global Average, 2022 January

Rebellion against authority:
Case studies

Protecting public spaces

Budweiser's Unbreakable Courts initiative in Brazil uses a legal loophole to save basketball courts from developers.

Don't Pay UK

The advocacy group encourages consumers to refuse to pay their energy bills beginning with price rises on 1 October.

Google Let's Internet Better

The campaign aims to help Gen Z critically evaluate the truthfulness of information they find online.to sit for hours on the face.

How to act for 2023

Be seen to be authentically on the side of the people. At a time when an "us vs. them" mentality is widespread, it's easy for the corporate world to be seen as a greedy entity aimed. However, consumers have a relatively high degree of trust that businesses can get things done, especially when compared with government, the media and NGOs. Brands have an ongoing opportunity to show that they are willing and able to help **Naked Citizens**, even those who are not their direct customers, to overcome challenges in life.

Stand up for causes that may go against the established order. While adherence to laws and rules has always been a fundamental basis for consumer trust, the rebellion against established authority suggests that this may be changing, or at least is more qualified. In this environment of **Moveable Morality**, don't be afraid to state your principles clearly. Go beyond slacktivism and purpose-washing to show that you are willing to put your principles before profit or mainstream acceptance – or, in some special cases, the law as it stands. This could involve protecting employees' reproductive rights or championing the use of a previously banned drug for health reasons.

Be prepared to decolonise your brand and empower the marginalised. Brands must show that they embrace true democratisation and are willing to make their customers stakeholders in a meaningful way. Doing so may protect brands from disruptive competitors that are designed from the ground up by or with their customers in mind.

Tell consumers the facts, but be careful when telling them what to think. A central implication of the **Fact Finders** trend is the need for brands to present their customers with facts about their product or service in a transparent way. However, bear in mind that these facts may not lead everyone to the same conclusions. While brands shouldn't be seen to endorse or even acknowledge conspiracy theories, they should be wary of providing selective evidence to bolster a particular claim. For instance, when taking what may be viewed as a woke stance, brands should be prepared to alienate at least some of their target audience.

Rebellion against surveillance

Mindset 3

Data sharing, targeted advertising, CCTV, facial recognition, drones and camera doorbells are all normalised aspects of everyday life, with many consumers relatively indifferent to these innovations and activities. COVID tracking apps were widely accepted worldwide and seen as necessary in fighting the spread of the virus, thereby providing a tangible benefit to those being tracked. From fertility apps to **Fitbits**, carbon calculators to phones that unlock with facial recognition, consumers are leveraging their personal data in order to optimise health, increase convenience and quantify their lives. But as surveillance at work, at home and in public becomes more common, not to mention widespread fears of identity theft, cyber crime and online security breaches, a minority of consumers are fighting back, and they're determined to achieve anonymity.

Seeing Beyond: How will the rebellion against surveillance unfold over the next decade?

Below, we lay out three possible futures of the rebellion against surveillance based on weak signals, critical uncertainties and the ongoing impact of structural drivers:

This image was generated by an AI illustrator using the prompt "Man and woman hiding their face from surveillance technology, pixelated faces, avoiding data tracking." It represents our central scenario for the rebellion against surveillance.

Credit: Midjourney

Central scenario (the most plausible future in 2033):

The world divides into data pragmatists and privacy-first surveillance sceptics.

There is near-universal awareness of data collection and data privacy regulations, with most consumers willing to share their personal information with trusted brands in return for value – namely better personalisation and a society that runs smoothly. Gen Alpha, the oldest of whom are coming of age at 18, use their personal data as a bargaining chip, holding it back unless they are certain that the return is worth it. Brands that successfully engage in the data economy make transparency and putting consumers in control top priorities.

Data fundamentalists – those who have deep concerns about privacy and refuse to share data – are a small minority, and with data collection becoming more core to consumer life, they have a much poorer, more analogue experience of products and services. As such, there is room for brands to educate this group and promote data transparency in order to help them overcome lingering doubts.

A number of consumers continue pushing back against online presentation culture and the pressure of being constantly visible. Some hide behind anonymous avatars in the metaverse and stick to audio- or text-only apps and social media spaces. Others have taken augmented reality to the max, using filters and effects to enhance or distort their online image while working and socialising.

Extreme rebellion:

Anonymity rules as we see a full-on rejection of tracking and surveillance.

Authoritarian political institutions and big brands have exploited surveillance technology to the extent that consumers feel they are being constantly watched. They also feel their minds are constantly manipulated to buy things they don't need and to consume disinformation. Leaks from several Big Tech companies have revealed that this is the goal of their data collection. Most consumers feel they don't have control or oversight over how their data is used, and sharing their personal information only leads to negative outcomes – financially and psychologically. Several major data breaches have been poorly handled, leading to even more distrust.

As a result, a majority of consumers are opting out of activities that involve data tracking, from using mainstream search engines to interacting on social media platforms. Instead, they are retreating to niche, decentralised online spaces, privacy-first search engines and encrypted messaging apps, where no one uses their real name or image as default, only avatars and handles. Some eventually show their real identity in a "face reveal". With anonymity so widespread, trolling is an even bigger problem, especially in the metaverse, where an avatar's virtual actions can have a real-life effect on the person on the receiving end. It may be up to brands to police bad behaviour and encourage compassion and empathy in these spaces.

Reversal:

The dominant attitude is one of total data indifference.

Most major markets have implemented GDPR-inspired data protection laws, giving consumers the peace of mind that their information is being used responsibly. Major health and scientific breakthroughs have been made thanks to data-sharing, and so consumers see this as a fundamental part of keeping society running. Meanwhile, successful PR campaigns have overhauled the reputation of drones and facial recognition technology, both of which have been proven to largely make the world a safer place.

Consumers are required to use a singular digital identification to access the metaverse, and most accept this as a way of minimising bad behaviour and building a safe and inclusive virtual world. Brands will need to stay true to this vision, recognising each consumer's right to safeguard their identity.

New Trend: **Going Incognito**

Striving for privacy and invisibility in an age of omnipresent surveillance

In the digital era, anonymity is a privilege. Tracking and surveillance are becoming increasingly prevalent, with brands capturing biometric data and workplaces using productivity tracking software – known derogatorily as "tattleware" or "bossware" – to keep an eye on remote workers. In fact, a 2022 examination by the **New York Times** found that eight of the 10 largest private US employers track the productivity metrics of individual workers, many in real time. Meanwhile, governments and law enforcement across the globe, from China to India and the UK, are harnessing facial recognition technology to locate suspects and make arrests. It's notable that nearly 2 in 5 global consumers (38%) own a wearable device – up from 1 in 4 in 2019 – and that this figure is climbing in nearly all countries surveyed. The exceptions are Russia and China – arguably two of the most surveilled and authoritarian nations (source: **Foresight Factory**, 2022).

Consumers want relief from the pressure of creating a visual personal brand. The desire to disappear is not just about safety; it also reflects a fatigue with the performative nature of being online. It's why apps and websites where users don't have to use their real name or image – think **reddit, Tumblr** and **Discord** – continue to flourish, while new players like **NGL** and **Sidechat** enable users to post and interact anonymously. Meanwhile, Twitch users and **VTubers** (virtual YouTubers) such as **Iron Mouse**, who boasts 1.3 million **Twitch** followers, present themselves online as animated characters, choosing to hide their real identity except for the occasional "face reveal". A watchout here is that anonymity can sometimes lead to bad behaviour; it's why 43% globally agree with the statement "nobody should be allowed to be anonymous when using the internet" (up from 39% in 2019), although Gen Z are the least likely generation to agree (source: **Foresight Factory**, 2022). As brands begin to experiment with metaverse offerings, the notion of anonymity and its impact on virtual interactions will be an important one to consider.

Ownership of connected wearable devices

% who own a wearable device that connects to the internet (eg a smart watch, a smart wristband)
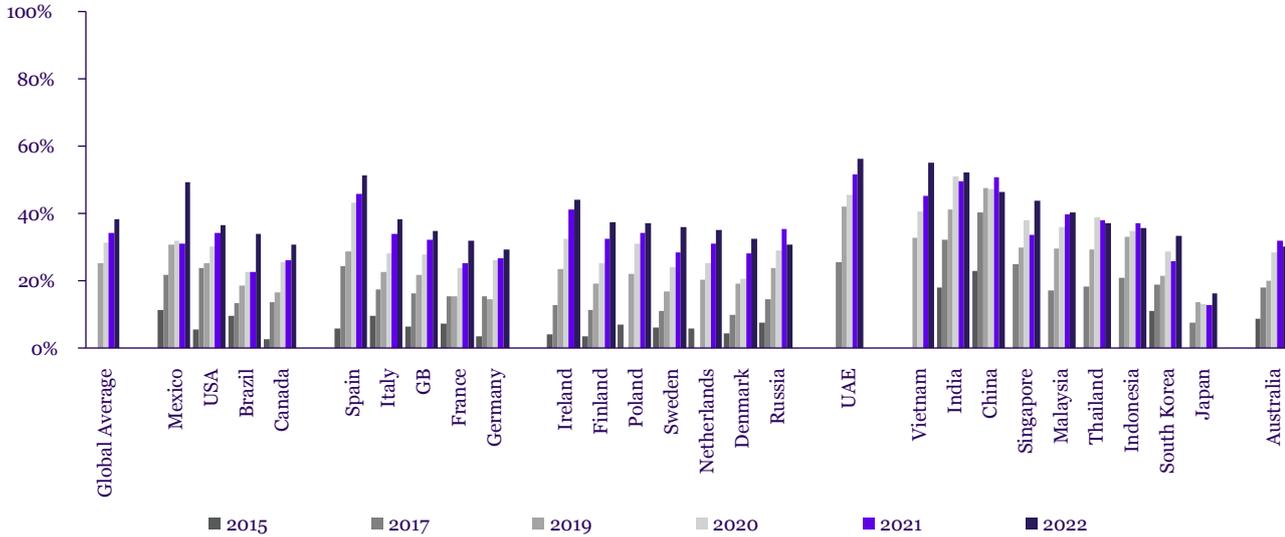
Legend: 2015 | 2017 | 2019 | 2020 | 2021 | 2022

Source: Foresight Factory | Base: 612-3886 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Disagreement with the statement "nobody should be allowed to be anonymous when using the internet"

% of global consumers who disagree or disagree strongly with the statement "Nobody should be allowed to be anonymous when using the internet"

Legend: 2019 | 2022
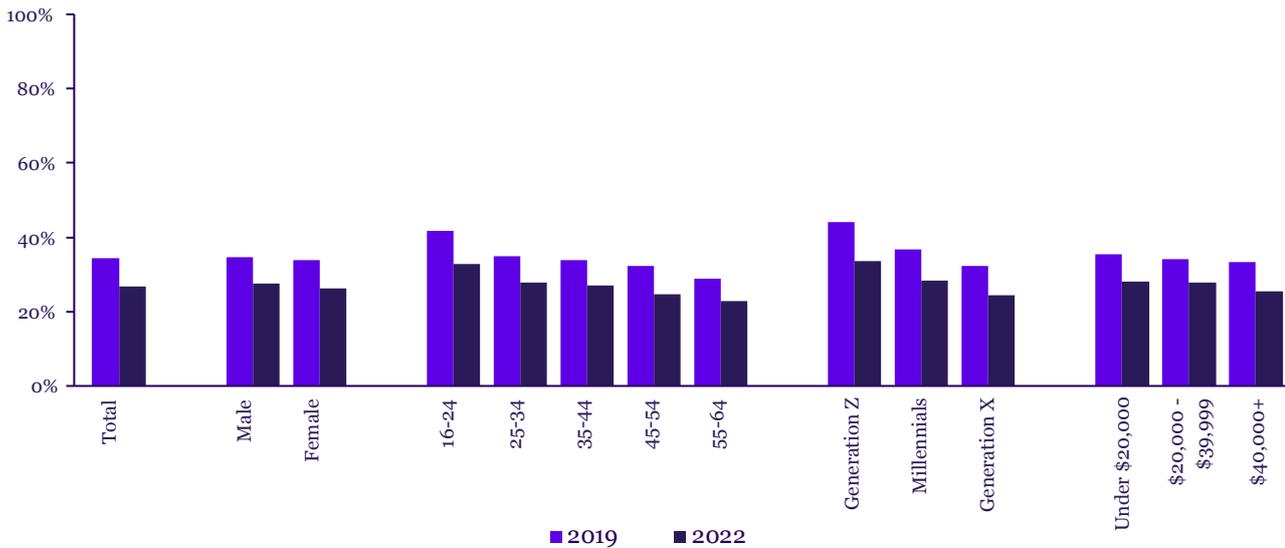
Source: Foresight Factory | Base: 32538 online respondents aged 16-64, Global Average, 2022 March

Energised Trend: **Data as Currency**

Personal data is a valuable commodity to be traded and kept safe

How is Data as Currency energised in 2023?

Consumers are exploring ways to circumvent the data economy and escape oversight. This is especially pressing where human rights are at risk. In the US, for instance, consumers are being advised to delete their period tracking apps after the overturning of Roe v. Wade, to avoid prosecution by law enforcement who could use this data against them. In Europe, awareness of the General Data Protection Regulation (GDPR) has more than doubled in the past four years data (source: **GDMA/Foresight Factory**, 2022). Brands are responding to the desire for more data privacy: **Google** plans to phase out cookies in **Chrome** in 2024, with the aim of moving to a more privacy-focused mode of tracking. And we are seeing the rise of encrypted messaging apps like **Signal** and **Telegram**, which promise a more secure mode of communication than **WhatsApp** or **Facebook Messenger**.

Nevertheless, data pragmatism remains the dominant attitude among consumers. A majority of global consumers (58%) agree with the statement "I like the brands I buy from to recognise me as a customer", suggesting a level of comfort with personalised interactions, which are often powered by data (source: **Foresight Factory**, 2021). Indeed, over half (54%) of consumers across 16 global markets are happy to exchange data with businesses so long as there is a clear benefit for doing so. Just 18% qualify as **Data Fundamentalists**, meaning they are concerned about online privacy and unwilling to provide personal information, even in return for enhanced service. And yet, while many consumers are happy to hand over personal information, there may be a disconnect in the future when it comes to expectations of value exchange: a majority of consumers expect companies to keep improving levels of personalisation without having to collect more of their data (source: **GDMA/Foresight Factory**, 2022).

Concern about sharing personal data

% who agree or agree strongly with the statement "When I download and use an app on my mobile phone, I am concerned about who my personal information / personal data is shared with"
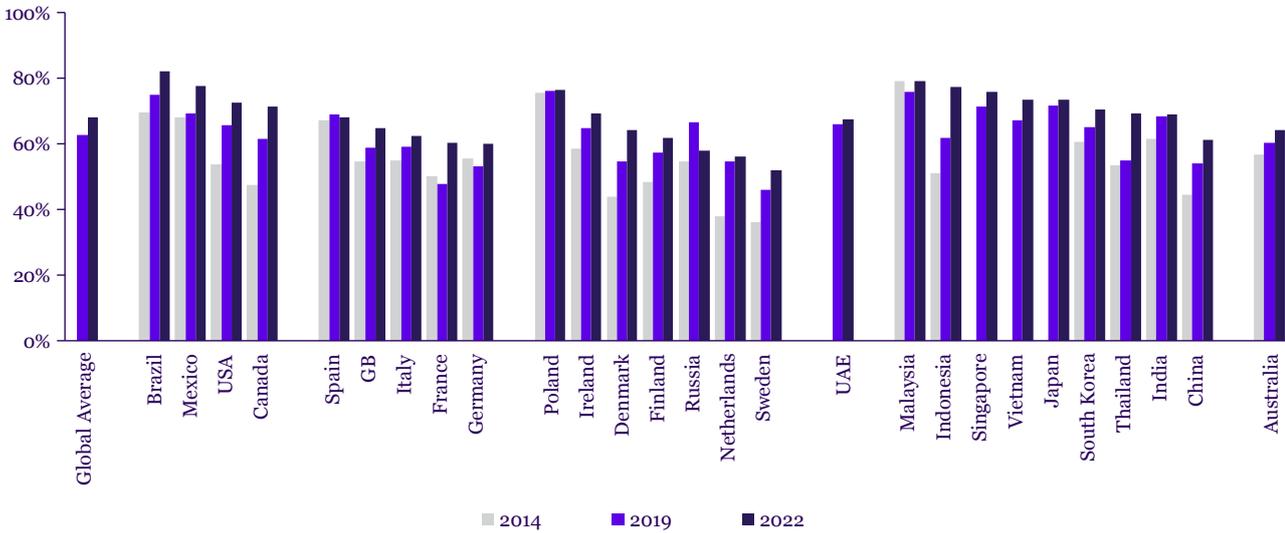
■ 2014　■ 2019　■ 2022

Source: Foresight Factory | Base: 612-3886 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Consumers expect value in exchange for their data

■ Strongly agree　■ Agree

	Strongly agree	Agree
China	23%	56%
US	31%	42%
UK	26%	48%
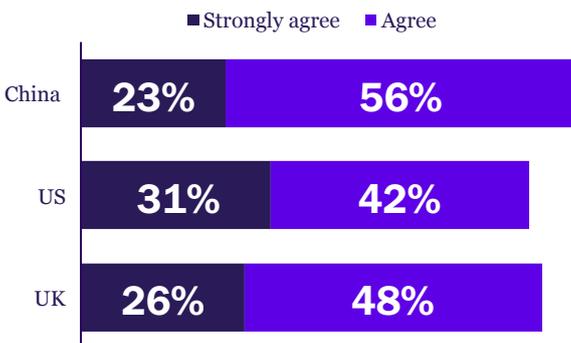
% who expect companies to keep improving personalisation without having to collect more personal information

Source: GDMA/Foresight Factory, Consumer Attitudes To Privacy Research, 2022

Data pragmatism is the dominant consumer attitude

■ Data Pragmatists — 54%
■ Data Unconcerned — 28%
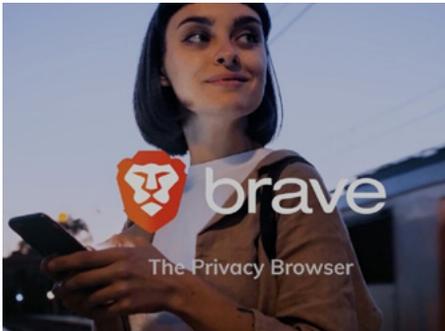■ Data Fundamentalists — 18%
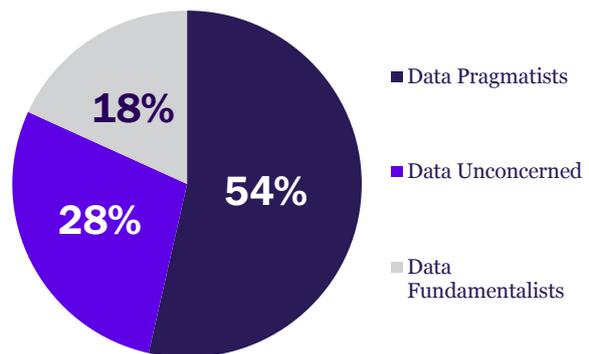
% of global consumers in each segment based on their attitude to data sharing. Data Fundamentalists are unwilling to share info even in return for benefits

Source: GDMA/Foresight Factory, Consumer Attitudes To Privacy Research, 2022
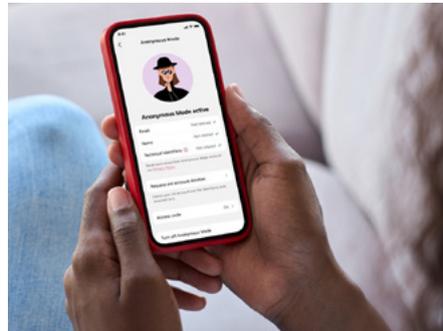
Rebellion against surveillance:
## Case studies

Privacy-first search engine

The **Brave** browser blocks ads, trackers and third-party data storage, and similarly designed **Brave Search** has grown 5,000% since launching in 2021.

Anonymous Mode for period app

In response to the overturning of Roe v. Wade in the US, women's health app **Flo** launched a mode helping users protect their sensitive reproductive health information.
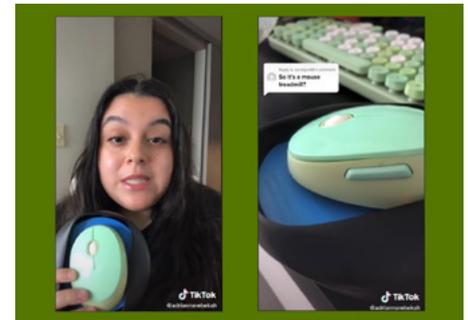
Viral mouse jigglers

As more companies use productivity tracking software to monitor their employees, remote workers are avoiding detection by buying mouse movers that make them appear active.

How to act for 2023

Give consumers a sense of agency and control over how their data is used. Give consumers the option to choose the rewards or benefits they receive in return for their data, offering a range of privacy settings, and being transparent about sharing any information with third parties. Maintain open communication channels, complying with customers' requests to delete personal or sensitive information in a timely manner. And remember to always communicate the principle that sharing data is a choice, not something foisted upon them.

Prepare for a world without third-party cookies by giving consumers a reason to opt-in to sharing directly. Consider the end of Google Chrome cookies an opportunity to strengthen your one-to-one relationship with customers through first-party data. What novel experiences and services could you entice consumers with – whether it's a virtual event, a compelling newsletter or an exclusive community – that would warrant collecting their information? Do you have a solid social media marketing strategy that allows you to target interested communities directly? Now is the time to hone these areas.

Clearly highlight how consumers can benefit from sharing their data. Brands can play a role in reassuring consumers that sharing data can reap rewards for them too. Could you, for example, promote messaging that shows how data-powered personalisation creates an all-round better and more inclusive experience for customers? Or could you highlight how sharing data can be a positive social act, giving small businesses a chance to grow and thrive without having to spend big on mainstream advertising? And could you assuage security concerns by explaining that tracking can be a way to boost customer safety?

Recognise and reflect consumers' desire to opt out of being always visible online. The pressure to perform is keenly felt, especially by younger generations. Going **Incognito** holds appeal in a world where "personal branding" and self-promotion have arguably been pushed to the extreme. As you invite consumers to socialise and connect with you and one another in online spaces, could you give them freedom to experiment with different digital identities and pseudonyms? Key to success here is striking a balance between allowing for anonymity and protecting users' wellbeing and safety.

Rebellion against restraint

Mindset 4

Consumers are under constant pressure to be vigilant when it comes to saving for the future, protecting their health and avoiding climate catastrophe. But while restraint and risk aversion will remain behavioural drivers in 2023, we'll also see a powerful counterforce growing, one that favours here-and-now indulgence, YOLO hedonism and maximalist excess. In response to a culture of relentless self-optimisation – not to mention a feeling of powerlessness in the face of an uncertain future – consumers are taking back control by living life on their own terms. Instead of doing what they should do, they're doing what they want, no matter the consequences.
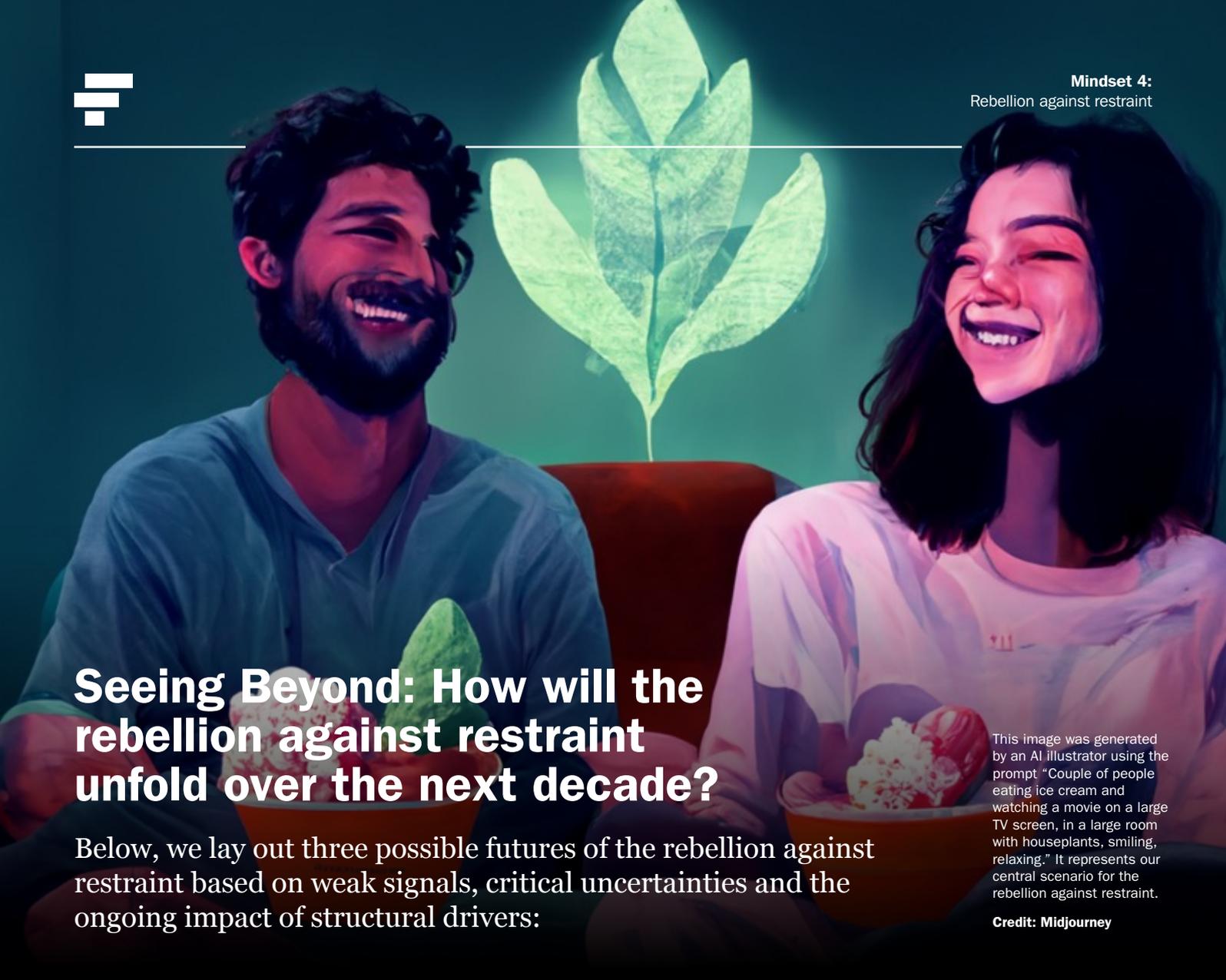
Seeing Beyond: How will the rebellion against restraint unfold over the next decade?

Below, we lay out three possible futures of the rebellion against restraint based on weak signals, critical uncertainties and the ongoing impact of structural drivers:

This image was generated by an AI illustrator using the prompt "Couple of people eating ice cream and watching a movie on a large TV screen, in a large room with houseplants, smiling, relaxing." It represents our central scenario for the rebellion against restraint.

Credit: Midjourney

Central scenario (the most plausible future in 2033):

Moments of hedonism are seen as an essential feature of full, healthy lives.

Consumers have become skilled at incorporating purposeful pleasure into everyday routines and leisure time. As the link between hedonistic activity and wellbeing grows, so too does justification for occasionally relaxing self-imposed restraints on consumption or activities once considered too unhealthy or unproductive, or those with a questionable impact on the environment.

Moreover, a near-constant background hum of economic uncertainty and environmental anxiety means that while many consumers recognise the value of frugality and restraint, here-and-now moments of unfettered pleasure and mood-lifting indulgence have become go-to coping mechanisms – essential distractions from the dystopian day-to-day.

Consumers are aware of the tension and apparent contradiction between the need for a pleasure-filled present and wider eco-concerns, as well as health and financial considerations. As a result, many consumers seek to strike a balance between pleasure and prudence and look to brands for help in finding a healthy, affordable and sustainable equilibrium.

Extreme rebellion:

Reckless indulgence dominates in a world of pervasive pessimism and perpetual instability.

In the mid-20s it becomes apparent that the economic and geo-political challenges of 2020-23 were not temporary issues but rather the dawn of a new era of global instability and flux. Meanwhile, consensus builds among scientists that action to prevent climate catastrophe is failing, and that a point of no return has likely been passed. In response, a pandemic of hopelessness spreads, and consumers feel their only choice is to live for the present moment.

YOLO ("you only live once") is replaced with a more radical mantra: OLC ("one last chance"). Consumers rush to experience all that the world has to offer, before it's too late. This provides a boon to indulgence and escapism categories, while those with the means to do so prioritise travel, pleasure and experiences, paying little heed to the eco, social and even legal costs.

Companies' hopeful, optimistic messages of old deliver diminishing returns. Instead, messaging adopts a more individualistic and disinhibiting tone as consumers are invited to satisfy short-term goals and embrace pleasures once denied.

Reversal:

A new wide-ranging moralism severely curtails hedonism.

A culture of extreme self-restraint establishes itself in many nations in response to converging environmental, economic and health pressures. New penalties on certain behaviours have contributed to this shift. For instance, public healthcare systems are declining to fund treatments for conditions strongly linked to unhealthy lifestyles. And governments are expanding carbon taxes to discourage high-emitting behaviours, such as long-haul flights, eating red meat and sending goods to landfill, to hit 2050 emissions reduction targets. Meanwhile, a decade of stagnant real income growth has limited the consumer's ability and willingness to splurge, with prudence a widespread necessity.

Hedonism is still attractive, but many seek to indulge out of sight or in speakeasies, while ever more consumers look for harm-free alternatives better suited to a more restrained zeitgeist. Gen Alpha largely disapproves of previous generations' sense of entitlement to resource-intensive consumption, seeing it as symbolic of the ills of a capitalistic society. Moderation and frugality are aspired-to values, while more eco- and wellbeing-friendly pleasures are in demand.

New Trend: **Now or Never**

A carefree attitude of wanting to live for the moment

Confronted by a daunting, unpredictable future, consumers are embracing the present. Crises have come thick and fast over the past few years, most recently inflation and the rising cost of living. While consumers are aware that the "sensible" thing is to hunker down and embrace frugality – just as the sensible response to climate change is to adopt more sustainable behaviours – there's a feeling of malaise in a world where it seems as though the tough times won't ever let up. It's why 45% of US 18- to 35-year-olds say they "don't see the point in saving until things return to normal" (source: **Fidelity**, 2022). And it's perhaps why a majority of global consumers agree with the statement "I try to have as much fun as I can now and let the future take care of itself", with upticks in agreement seen across several markets between 2019 and 2022 (source: **Foresight Factory**). The thinking seems to be that if the world is already on fire, why not make the most of the here and now?

Brands are facilitating in-the-moment indulgence and pleasure-seeking. BNPL offerings across retail and travel are enabling people to "live now, pay later", while food and beverage brands like **Glonuts** and **Plink!** are rejecting the usual restrained health- and sustainability-focused branding in favour of riotous colour and playful messaging. Meanwhile, weariness about the future is prompting some consumers to take comfort in the past, hence the rising appeal of nostalgia and "fauxstalgia" – yearning for a time in the past that one hasn't actually experienced oneself, which partly explains the appeal of all things Y2k on **TikTok**. Indeed, 68% globally agree that "the stresses of modern life mean that people are less happy than they used to be" (source: **Foresight Factory**, 2022). The **Now or Never** attitude is about reclaiming that happiness through whatever means possible, before it's too late.
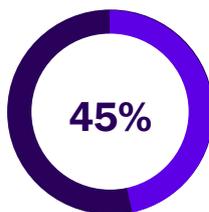

Living for the moment has widespread appeal

51%
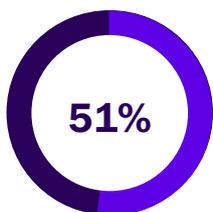
% globally who try to have as much fun as I can now and let the future take care of itself
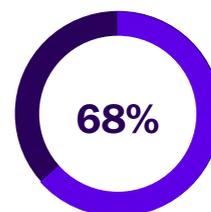
Source: Foresight Factory, 2022

Younger generations adopt "apocalyptic" spending habits

45%

% of US 18-35s who don't see a point in saving until things return to normal

Source: Fidelity, 2022

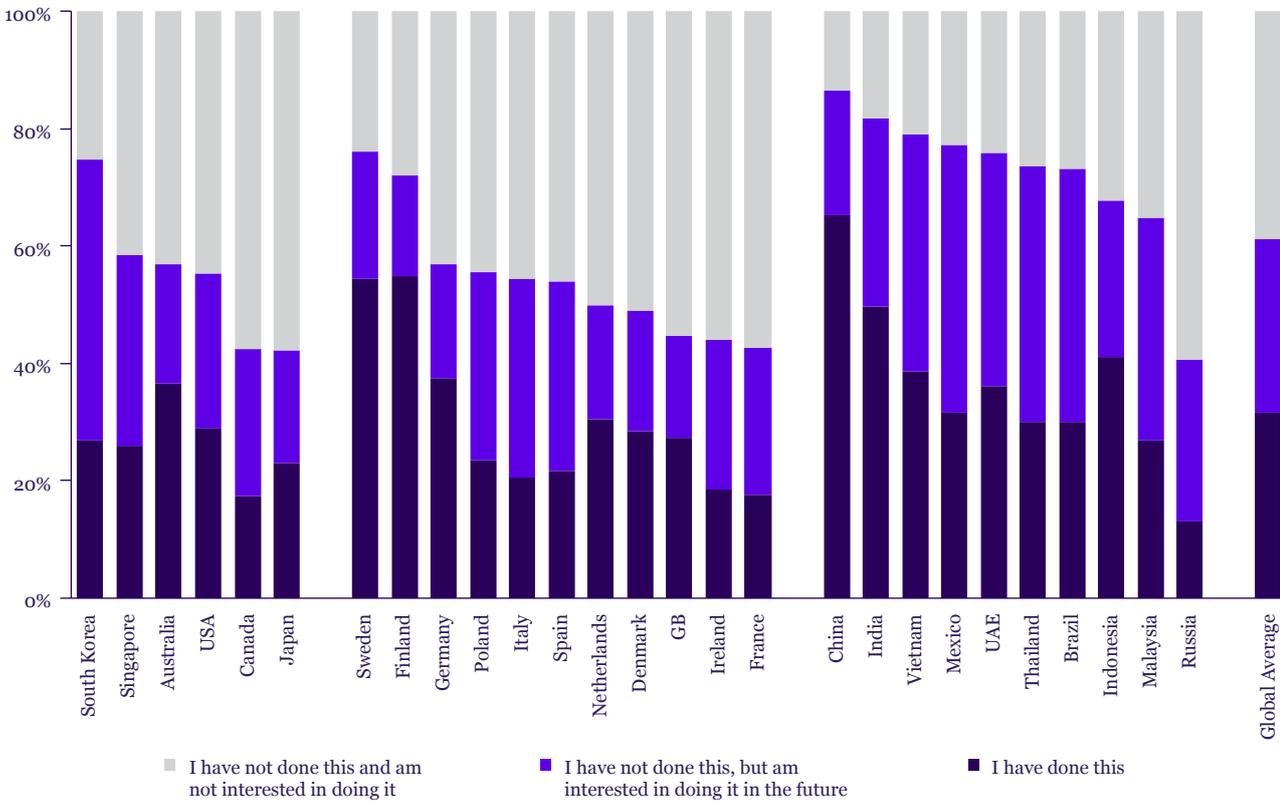### Weariness about the future is prompting consumers to take comfort in the past

68%

% globally who say the stresses of modern life mean that people are less happy than they used to be

Source: Foresight Factory, 2022

Uptake of and interest in buy now, pay later services

% who have used or are interested in using a buy now, pay later service
when buying online or in-store (e.g. Klarna)

Legend:
- ☐ I have not done this and am not interested in doing it
- ■ I have not done this, but am interested in doing it in the future
- ■ I have done this

Source: Foresight Factory │ Base: 612-3886 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Having fun now and letting the future take care of itself

% who agree or agree strongly with the statement "I try to have as much
fun as I can now and let the future take care of itself"

Legend:
- ■ 2019
- ■ 2022
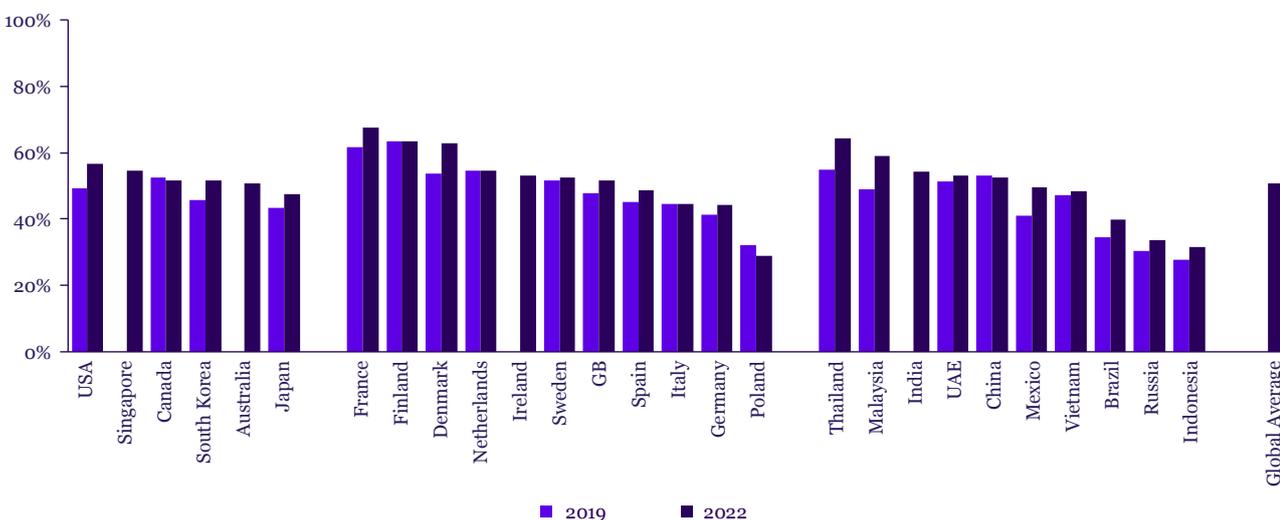
Source: Foresight Factory │ Base: 606-3824 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March
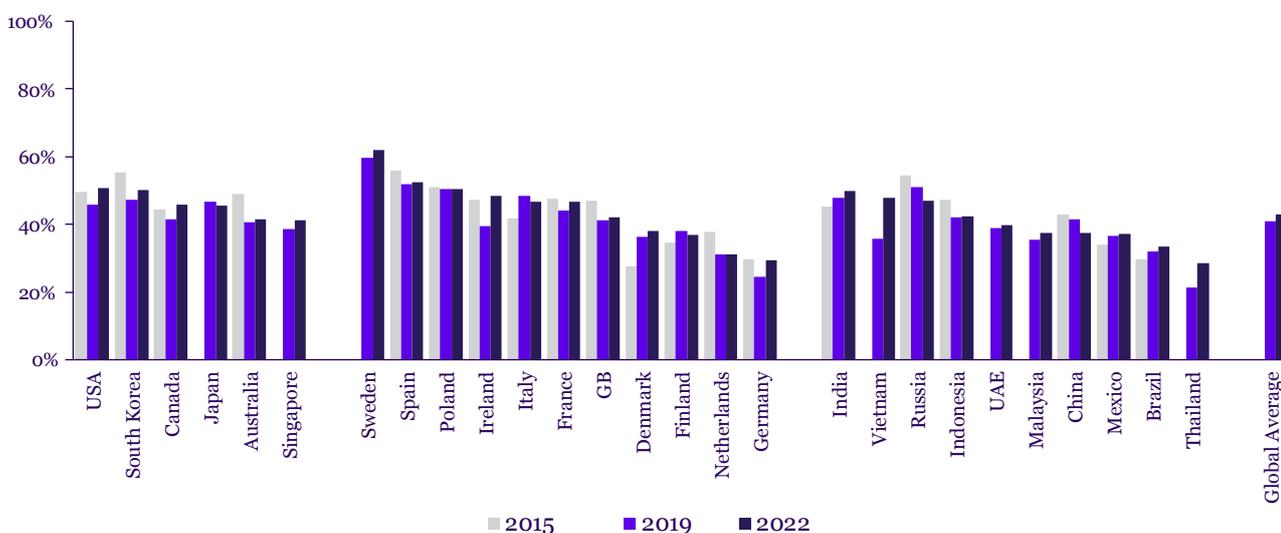
Energised Trend:
Everyday Celebration

The quest for reasons to regularly indulge and party

How is Everyday Celebration energised in 2023?

Consumers are determined to find joy in simple, day-to-day moments. Much of the world is facing difficult financial times – for instance, 1 in 3 GB consumers plan to delay spending on big purchases in the next 12 months – but that doesn't mean that happiness is necessarily out of reach. At a time when 43% globally say they love any excuse to have a celebration (source: **Foresight Factory**, 2022), there's a strong desire to make the most of every moment, no matter how ordinary. That could mean regularly setting aside time to connect with nature, or sharing an unremarkable moment from your day with friends via social media.

Loving any excuse to have a celebration

% who agree or agree strongly with the statement "I love any excuse to have a celebration"

■ 2015   ■ 2019   ■ 2022

Source: Foresight Factory | Base: 611-3885 online respondents per country aged 16-64 [Indonesia 16-54], 2022 March

Energised Trend: **Light Relief**

Finding comfort in guilty pleasures and low-stakes pastimes

How is Light Relief energised in 2023?

Unrestrained indulgence, comfort and escapism are in demand. Consumers are looking for balance in their media, food and leisure diets. Alongside a need for purposeful, healthy options, consumers are also making room for pursuits that have altogether less lofty, transformational goals at their heart. In fact, many activities once considered unserious, unhealthy or even low brow are nowadays viewed as worthwhile and even beneficial for relaxation, stress reduction and overall wellbeing – just look at the rise of casual social sports like pickleball and livestreamed gaming channels. By 2022, nearly 1 in 3 (31%) global consumers said they game as a self-care activity, while watching TV has become the number one activity consumers say they do to maintain their general wellbeing (source: **Foresight Factory**). Guilty pleasures are no longer enjoyed in secret – rather, their consumption will become a badge of honour in 2023.

Watching TV as a form of self-care

% of global consumers who say they watch TV to regularly maintain their general wellbeing
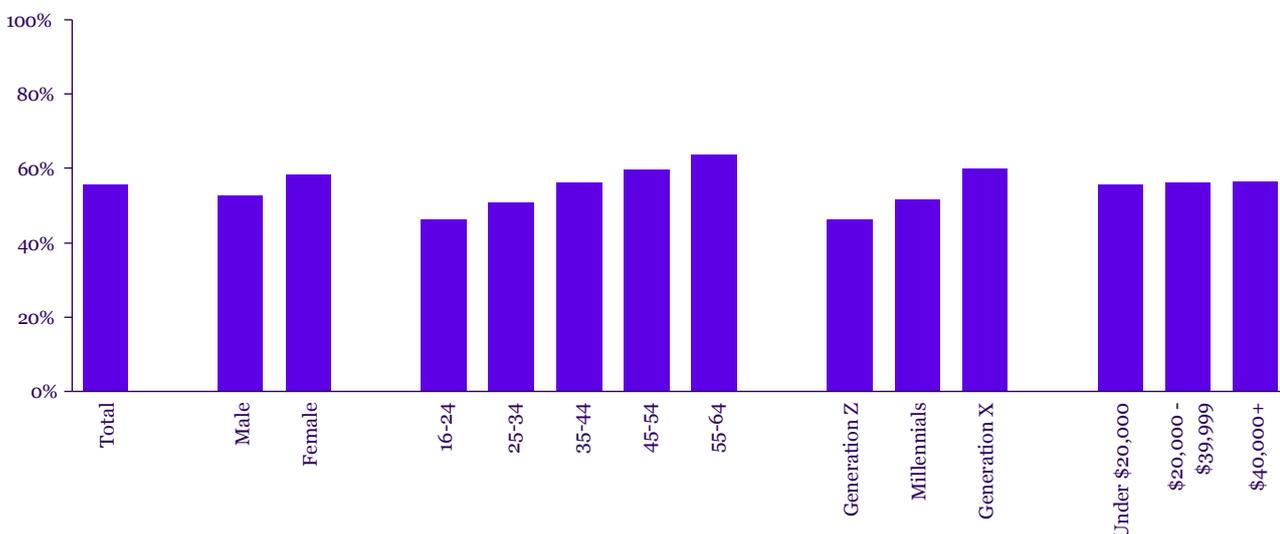
Source: Foresight Factory | Base: 9012 online respondents aged 16-64, Global Average, 2022 January

Rebellion against restraint:
Case studies

John Lewis refreshes branding

A new campaign from the retailer taps into what it calls the "moments economy" – a consumer need for everyday moments of celebration and pleasure, even if finances are under pressure.

Colourful snacking

Food and beverage brands like **Glonuts and Plink**! are rejecting the usual restrained health- and sustainability-focused branding in favour of riotous colour and playful messaging.

Apple Pay Later

Apple is adding functionality to **Apple Wallet** allowing purchases to be split into four equal payments spread over six weeks, with zero interest and no fees.

How to act for 2023

Tap into the "moments economy". Help consumers experience regular and spontaneous moments of escapism and celebration inside everyday routines. Make restraint-free pleasure permissible, and position such moments as beneficial to overall wellbeing as well as a welcome source of fun and diverting **Light Relief** – a powerful corrective to gloomy, uncertain times.

Make hedonism compatible with smart and sustainable consumption. Brands have an opportunity to champion pleasure-seeking and the freedom to loosen self-imposed restraints on consumption. And they can also lessen any associated guilt by innovating offerings that allow for more sustainable, cost-effective and responsible forms of pleasure.

Transform resignation into optimism. As outlined in **Now or Never**, a pessimistic outlook can add to a heightened need to prioritise the here-and-now over the yet-to-come. While satisfying a need for spontaneous, present-day pleasures, brands can also challenge any prevailing sense of pessimism with more positive positioning and messaging that highlights their purpose of building a better future for all.

What does the consumer rebellion mean for your brand?

Kickstart your 2023 planning

Book an advisory call to get to grips with how new and energised trends are impacting your audiences, markets and categories.

Foresight has never been more important

In turbulent times, foresight is the critical skill to master. Let us help you create a foresight culture and mindset within your business through practice and partnership, so you'll always understand what's happening, why, and what to do about it.

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