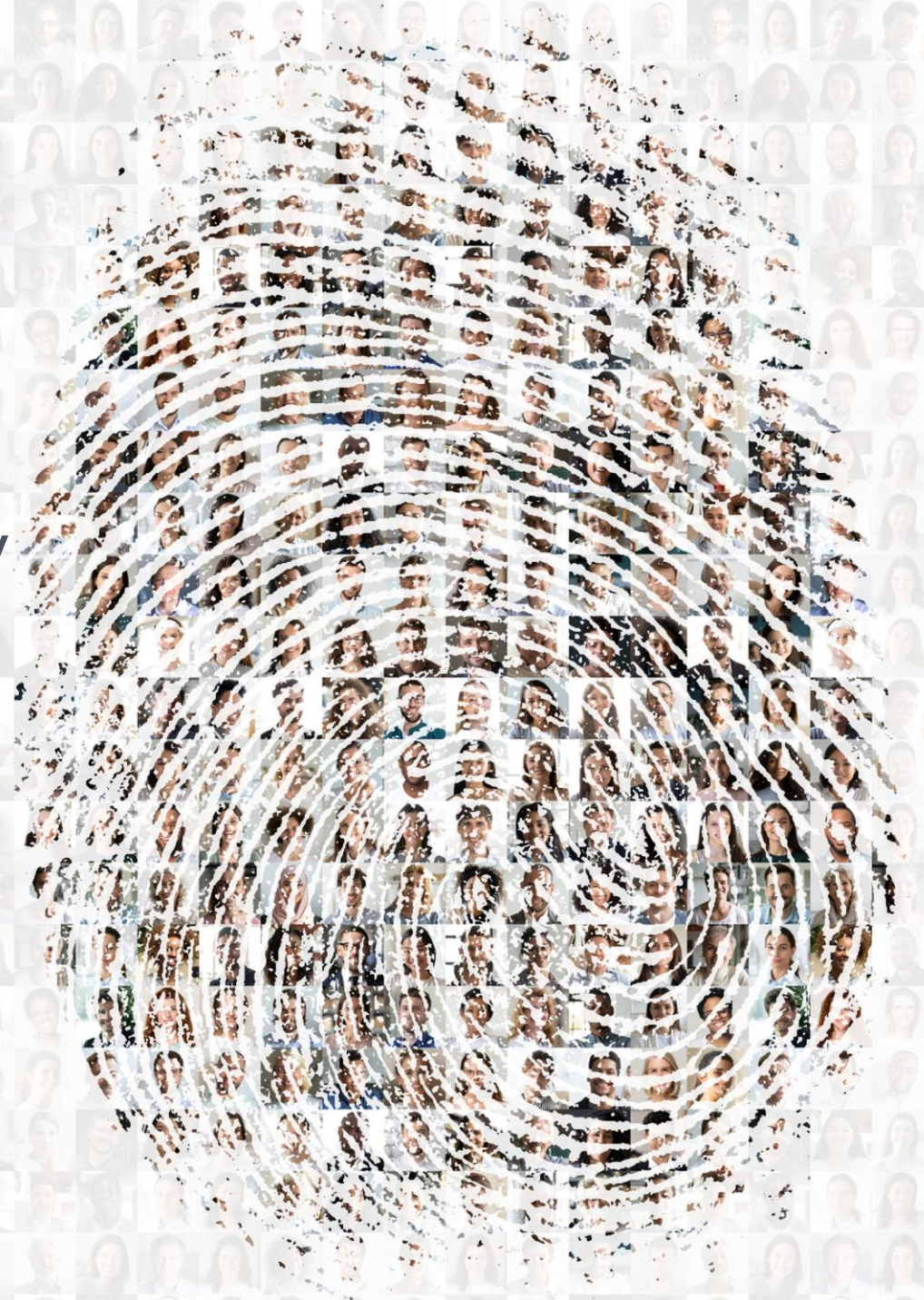


# America Now 2023:

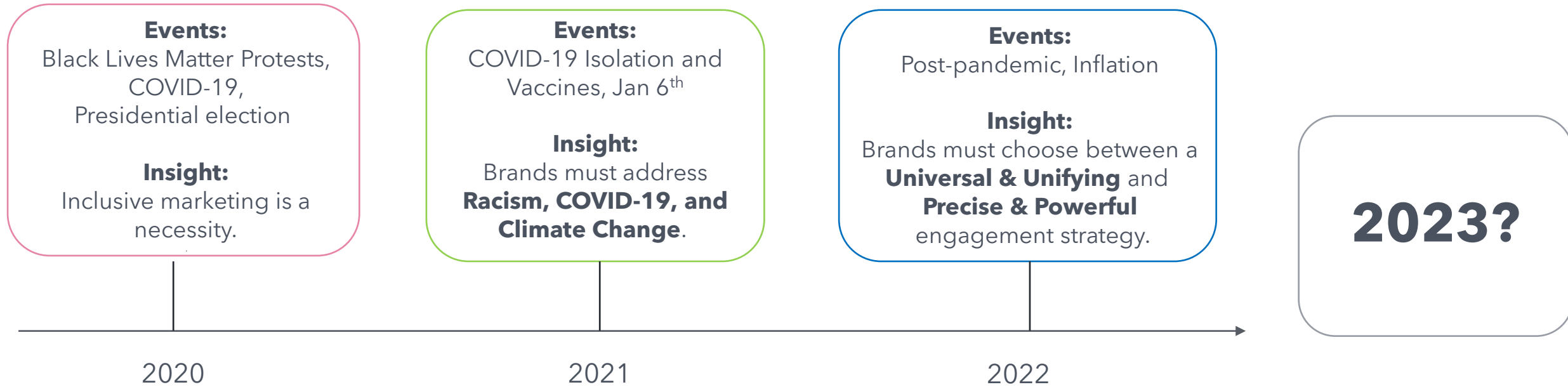
## Harnessing American Identity to Navigate Social Issues

Zekeera Belton, Vice President, Client Services  
Jack Mackinnon, Senior Director of Cultural Insights



# Since 2020, Intense Events Have Shifted Marketing Expectations

Our Annual America Now Reports Have Pinpointed the Zeitgeist and Timely Strategies



**2023?**

**Backlash**



# 2023 Has Brought New Levels of Backlash and Chaotic Pitfalls for Brands to Navigate

It Can Be Difficult to Determine What's Real and What's Just Loud



Inflation and Rising Cost of Living



Extreme Weather



The War on 'Wokeness'



Women's Rights



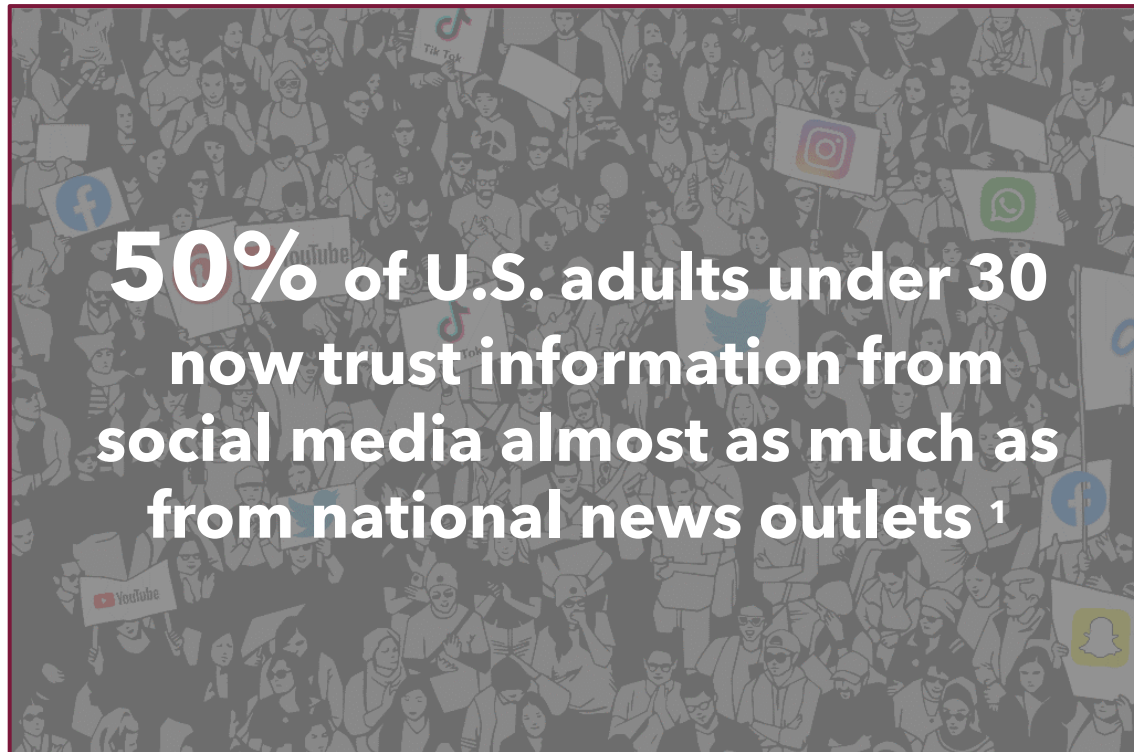
Artificial Intelligence



Backlash to LGBTQ+ Inclusion

# Technology Now Amplifies Backlash and Fuels Americans' Concerns and Uncertainty

Chat GPT and Other Recent Generative A.I. Advancements Only Heighten the Intensity



"Afraid of Technology"  
A.I.-generated image <sup>2</sup>

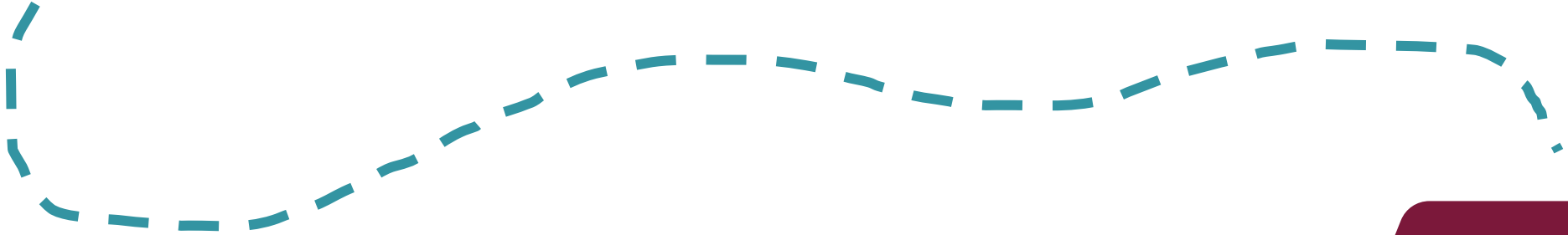


# Brands Elicit Trust & Loyalty

---



Products and Services fulfill tasks.  
**Brands earn commitment.**



Side-stepping tricky national conversations is not an option.



# Overcome the Divide by Understanding 3 Key Truths:

↓  
— **Polarization Is Permanent:** Political ideology now plays a bigger role in American consumers' identities, so brands must understand how that translates to personal values.

↓  
— **Backlash Is Inevitable:** Success towards inclusive marketing, sadly, has also led to more backlash, so brands must understand the nature of that backlash to deal with it.

↓  
— **Brands Must (*and Can*) Engage:** Consumers still demand brands engage in issues, so to grow your brand you must strategize around powerful-yet-unifying themes of *Personal Protections* and *Social Freedoms*.



01

**Polarization Is Permanent**

*Navigate  
a Generational Culture Shift*

02

**Backlash Is Inevitable**

*Strategize  
Growth over Fear*

03

**Brands Must Engage**

*Bridge the Divide  
with Two Themes*



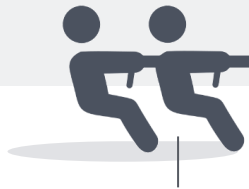
# We're in the Middle of a Generational Culture Shift

Social Media and Greater Diversity Are Rapidly Accelerating the Divide



## Generational Values Shift

### Boomer

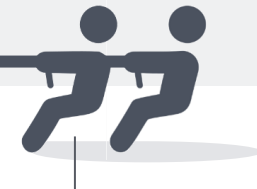


#### Rugged Individualism

Lives within a mono-culture and focused on stability, less emphasis and experience with diversity.



### Gen Z



#### Collective Individuality

Expects personal uniqueness and sees individualism as the means of fitting in.

#### Value Shift Accelerators

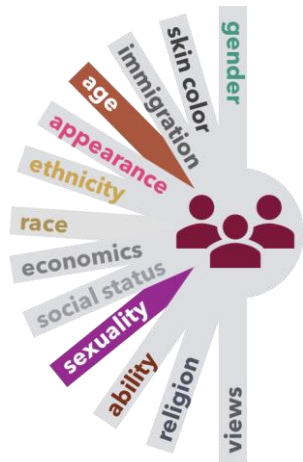


The rise of the internet



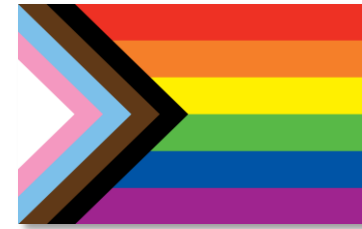
Increase in diversity

# Intersectionality and New Perspectives on Sexuality and Gender Are Changing How Americans See Themselves



## Amplified Intersectionality

Identity traits like **race, ethnicity, age, gender, sexuality,** and **political affiliation** are all increasingly important to many Americans. <sup>1</sup>



## Gender and Sexuality Shifts

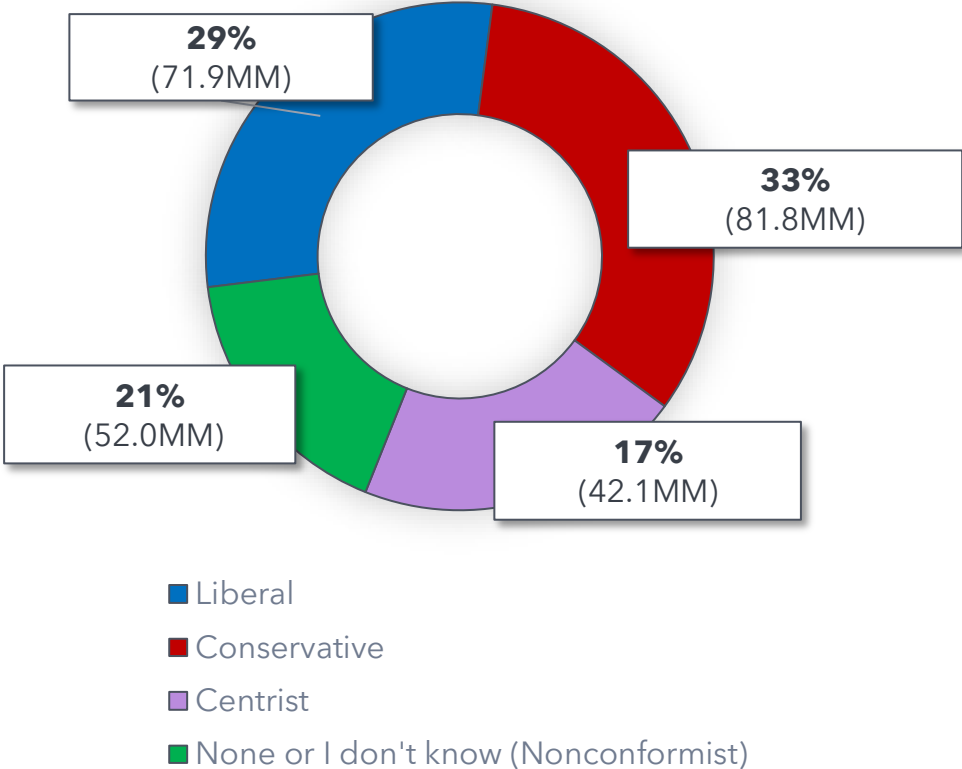
Approximately **30% of Gen Z** identify as **LGBTQ+** and more older Americans are feeling comfortable openly identifying as LGBTQ+ too. <sup>2</sup>

# Political Ideology Is Now More about Culture than Voting

# 47%

of Americans say their **political views** have become an increasingly important part of their identity over the past few years. <sup>1</sup>

Which of the following best describes your **political views**? <sup>2</sup>

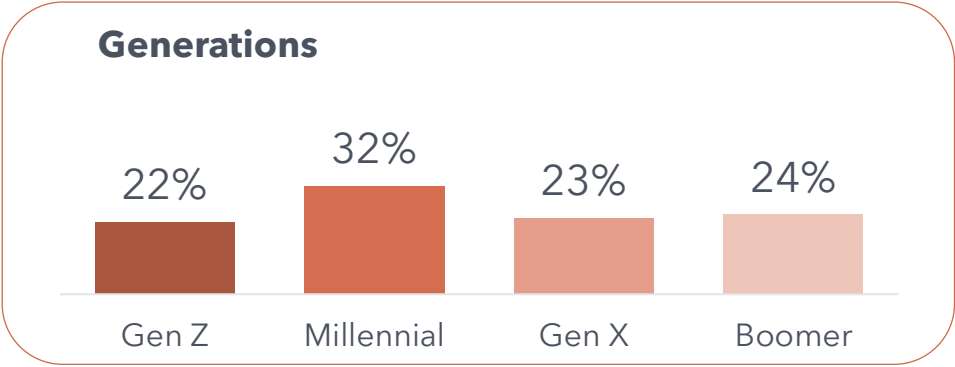
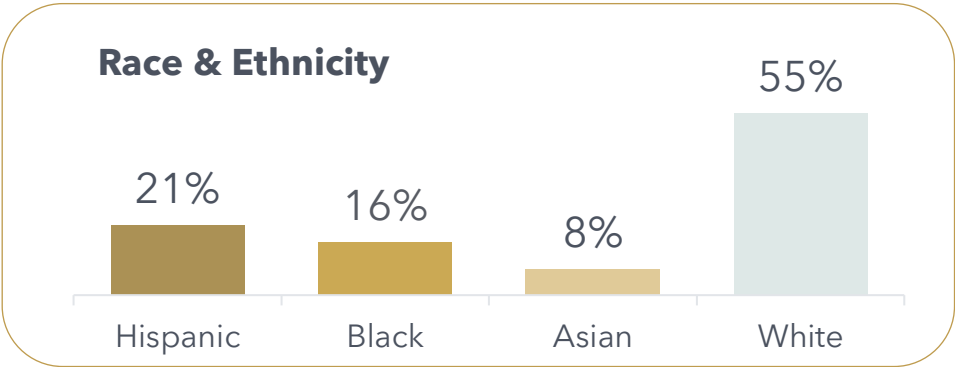


Source: Collage Group America Now Survey, August 2023, weighted data  
13-77 population (Total Pop., Generations, Political Ideology)  
18-77 population (Multicultural, LGBTQ+)  
<sup>1</sup> % agree (other answer options included "disagree" and "not sure")  
<sup>2</sup> Single-select (Liberal: Very liberal, Somewhat liberal; Conservative: Very conservative, Somewhat conservative)  
other answer options "These options don't apply to me or I don't know")  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Liberals Are the Most Diverse in Terms of Age, Race, and Ethnicity

## Liberals Value Cultural Awareness, Self-Expression, and Community Engagement

Demographic makeup of Liberal Americans <sup>1</sup>



Top 10 Cultural Attributes for Liberals (by Rank Diff vs. Non-Liberals) <sup>2</sup>	
#1	Cosmopolitan (+14)
#2	Creative (+13)
#3	Emotive (+12)
#4	Relational (+12)
#5	Activist (+12)
#6	Community-Seeking (+9)
#7	Joyful (+8)
#8	Expressive (+7)
#9	Uniqueness (+7)
#10	Community-Oriented (+6)

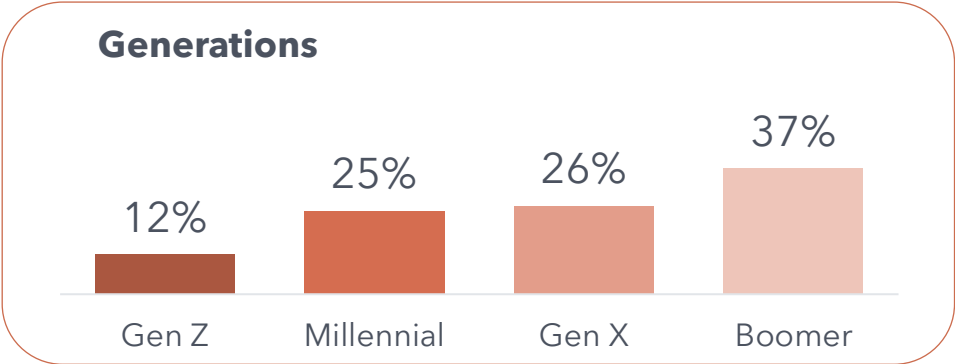
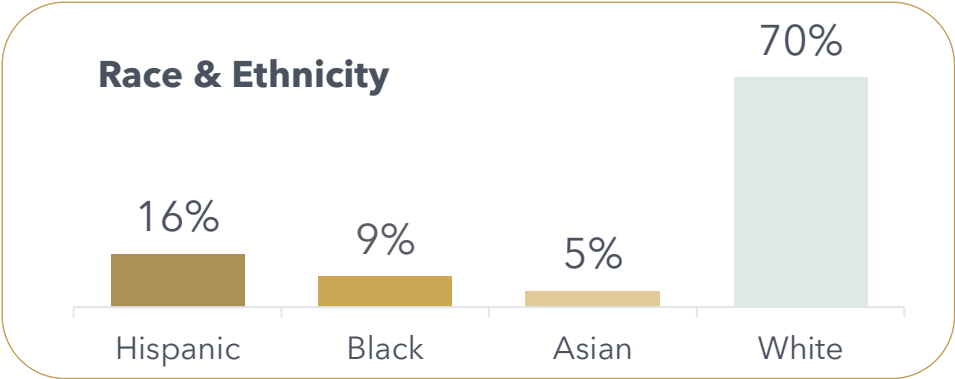


Source: Source: Collage Group America Now Survey, August 2023, weighted data  
 13-77 population (Total Pop., Generations, Political Ideology)  
 18-77 population (Multicultural, LGBTQ+)  
<sup>2</sup> Collage Group Cultural Traits Survey, January 2023 (13-77 population) unweighted, % agree, strongly agree

# Conservatives Are Mostly White Baby Boomers with Traits Greatly Differentiated from Other Americans

Conservatives Value Tradition, Religion, Patriotism, and Hard Work to Achieve Success

Demographic makeup of Conservative Americans <sup>1</sup>



## Top 10 Cultural Attributes for Conservatives (by Rank Diff vs. Non-Conservatives) <sup>2</sup>

#1	Exceptionalism (+32)
#2	Patriotic (+25)
#3	Typical American (+25)
#4	Religious (+25)
#5	Nostalgic (+22)
#6	Spiritual (+15)
#7	Perseverance (+8)
#8	Disciplined (+8)
#9	Content (+6)
#10	Deferential (+5)

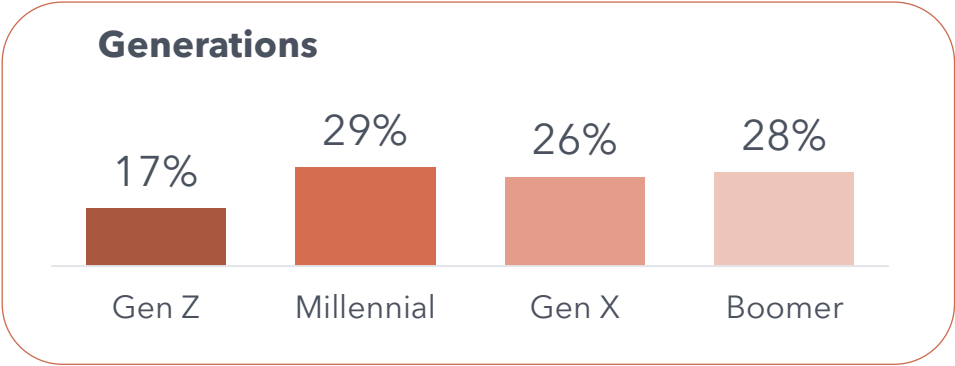
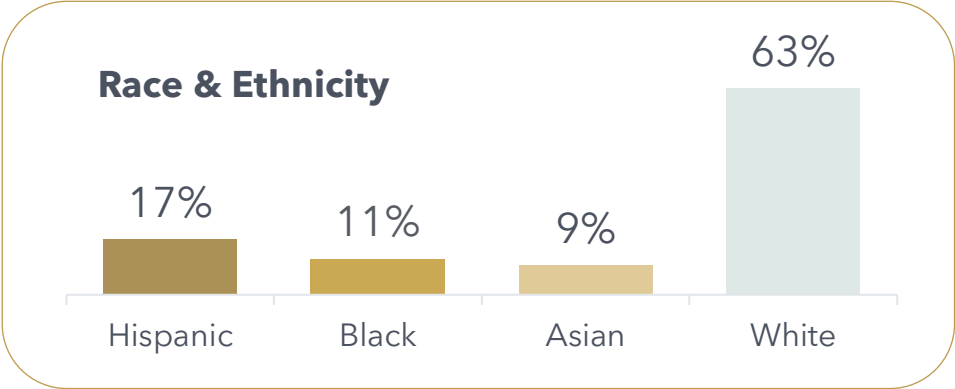


Source: <sup>1</sup> Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
<sup>2</sup> Collage Group Cultural Traits Survey, January 2023 (13-77 population), % agree, strongly agree

# Centrists Share Patriotic Traits with Conservatives, But Differ in Their Focus on Courage

Centrists Are the Most Balanced across Generation

Demographic makeup of Centrist Americans<sup>1</sup>



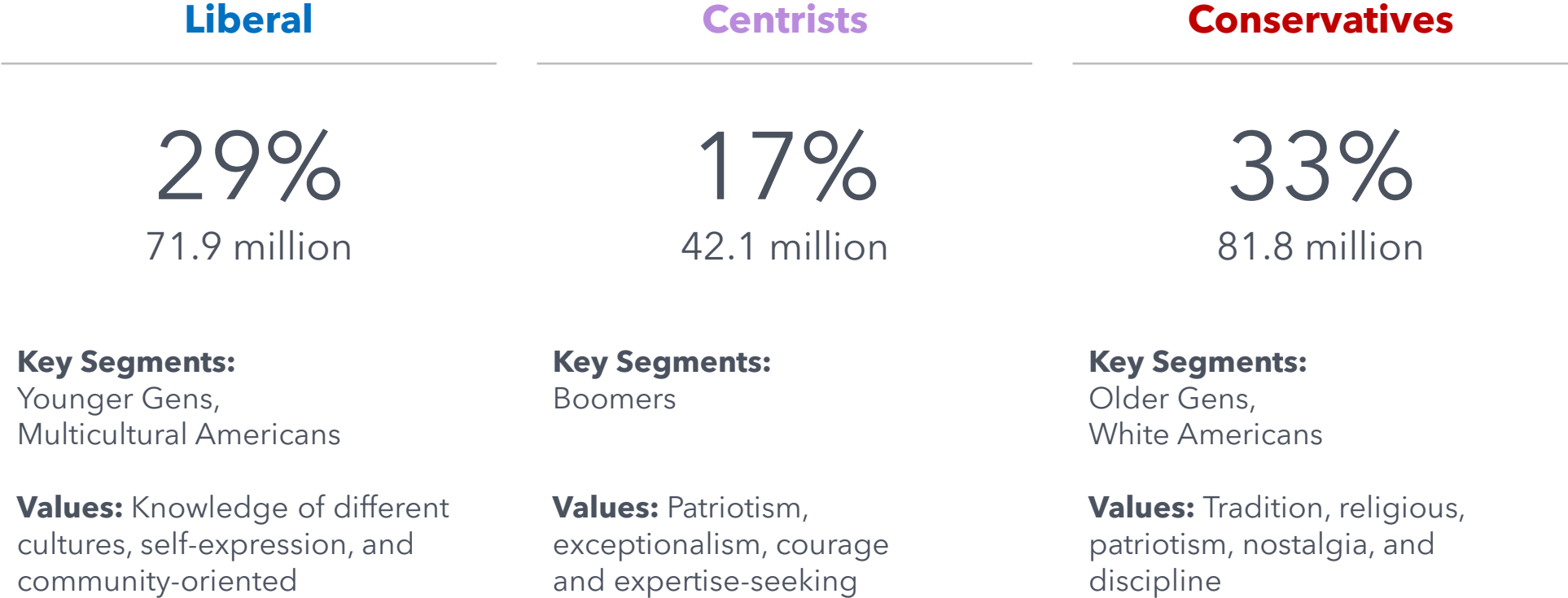
Top 10 Cultural Attributes or Centrists (by Rank Diff vs. Non-Centrists) <sup>2</sup>	
#1	Patriotic (+15)
#2	Expertise-Seeking (+13)
#3	Courageous (+13)
#4	Cultural Stewardship (+11)
#5	Disciplined (+9)
#6	Happiness (+8)
#7	Cosmopolitan (+8)
#8	Exceptionalism (+7)
#9	Heritage (+7)
#10	Analytical (+6)



Source: <sup>1</sup> Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
<sup>2</sup> Collage Group Cultural Traits Survey, January 2023 (13-77 population), % agree, strongly agree

# Political Ideology Now Constitutes Values-Based Cultural Groups

Conservatives Seemingly Outnumber Others but Cultural Coalitions Are More Nuanced...

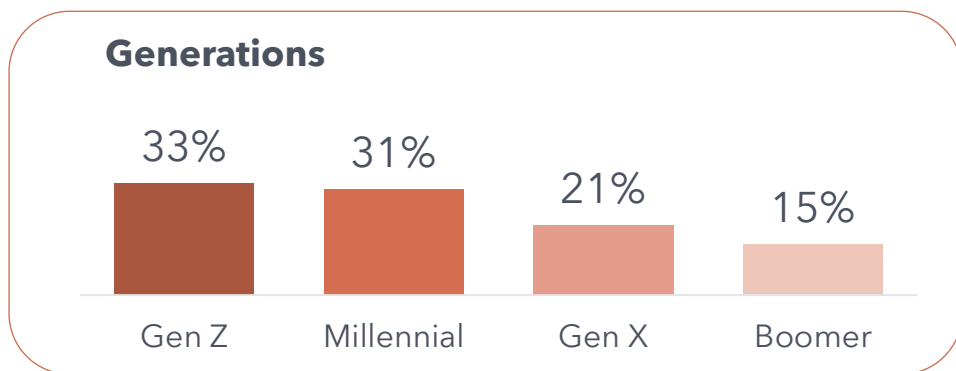
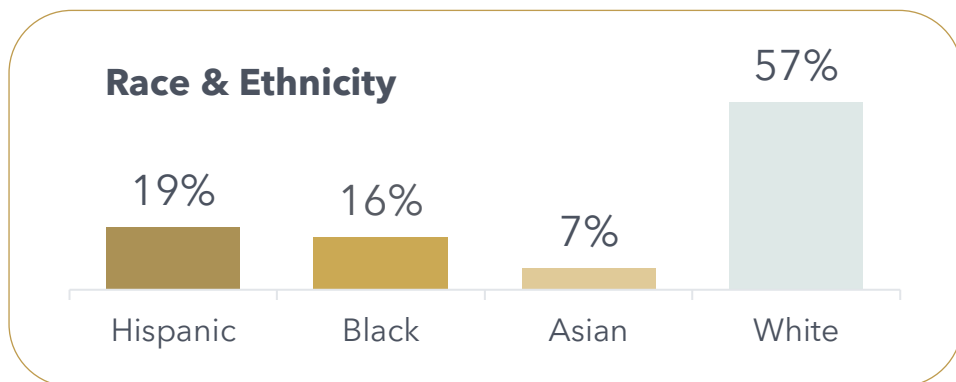


Source: Collage Group America Now Survey, August 2023, 13-77 population, 18-77 population, weighted, Single-select American Community Survey 2021 1-Year Data Collage Group Cultural Traits Survey, January 2023 (13-77 population), % agree, strongly agree

# Americans Who Opt Out of Political Affiliation Do So Intentionally and Based on Their Unique Values

They Exhibit Selflessness and a Readiness for Change, and Share Values with Liberals

Demographic makeup of respondents who did not designate a political view <sup>1</sup>

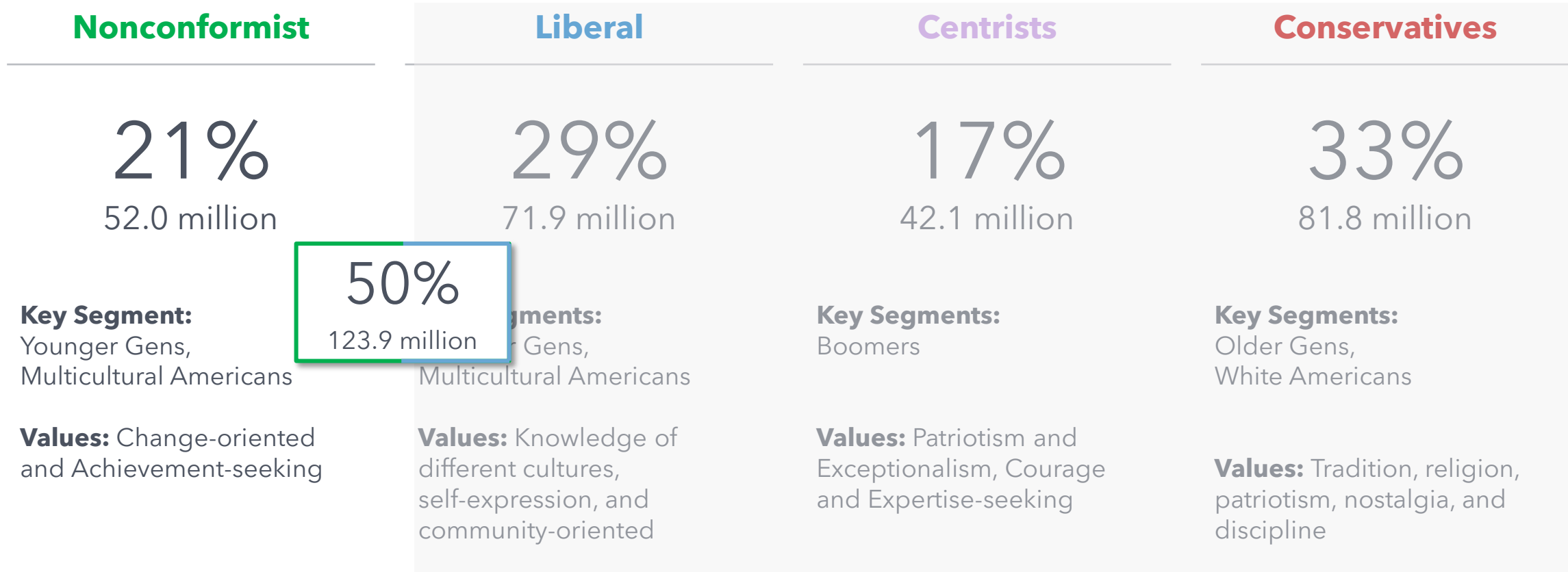


## Top 10 Cultural Attributes for Nonconformists (by Rank Diff vs. Non-Nonconformists) <sup>2</sup>

#1	Socially-Anxious (+26)
#2	Reserved (+15)
#3	Selfless (+14)
#4	Change-Oriented (+14)
#5	Achievement-Seeking (+14)
#6	Insecure (+13)
#7	Joyful (+11)
#8	Self-Assured (+11)
#9	Private (+10)
#10	Respect-Seeking (+10)



# Americans without a Clear Political Identity Tend to Be Younger and More in Line with Liberal Perspectives



Source: Collage Group America Now Survey, August 2023, 13-77 population, 18-77 population, weighted, Single-select American Community Survey 2021 1-Year Data Collage Group Cultural Traits Survey, January 2023 (13-77 population), % agree, strongly agree

# Overcome the Divide by Understanding American Identity:



**Polarization Is Permanent:** Political ideology now plays a bigger role in American consumers' identities, so brands must understand how that translates to personal values.



Respond to amplified **intersectionality, gender and sexuality** shifts, and a **generational transformation** by telling stories that highlight *Collective Individualism*.



Polarization is here to stay but it's not binary. Avoid simplistic caricatures and **speak to values over politics**.



01

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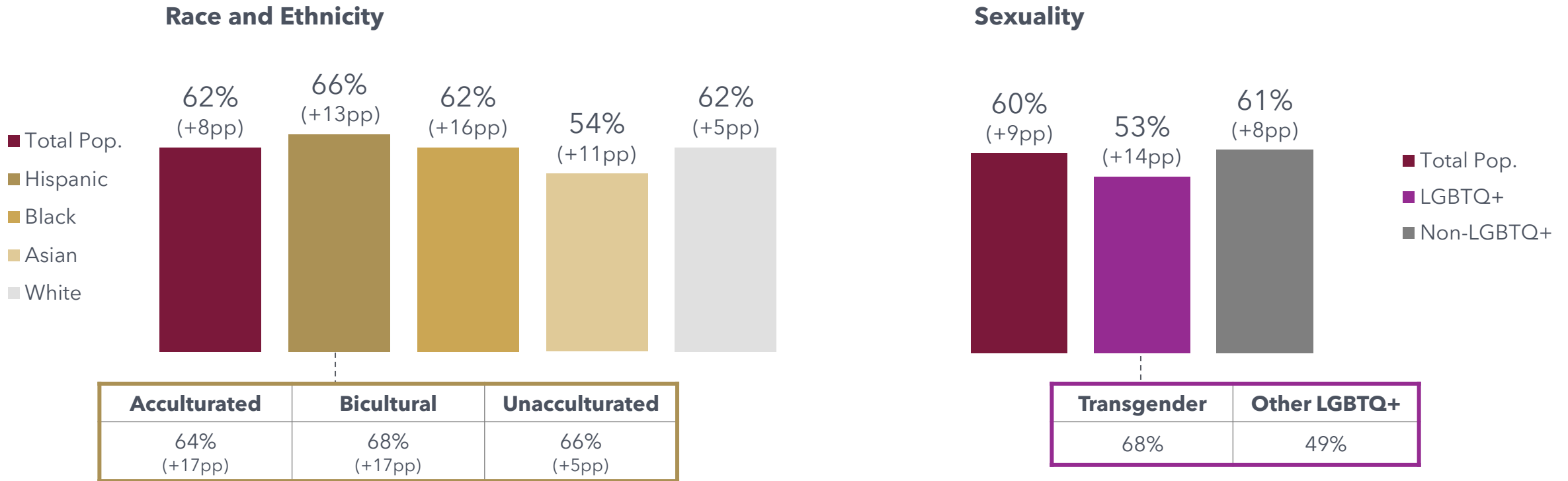
Brands Must Engage

*Bridge the Divide  
with Two Themes*

# Increased Inclusion of Multicultural and LGBTQ+ Americans in Advertising Has also Resulted in Higher Satisfaction

With Notable Increases among Hispanics and Black Americans and Transgender People

I am satisfied with portrayals of my \_\_\_\_\_ in advertising  
 () change from 2021



Source: Source: Collage Group America Now Survey, August 2023, 18-77 population, weighted data  
 Collage Group America Now Survey, September 2021 (18-75 population)  
 % agree (other answer options included "disagree" and "not sure")  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# In 2023, Backlash Often Came from Seemingly Innocuous Campaigns

Bad Actors Use **Backlash** to Bolster Their Online Engagement, Which Amplifies the Situation

## Brand Action

*M&M's Supports Women*



M&M's launched a limited-edition "Support Women" packaging featuring the brand's three female spokes candies.

## Backlash

*Social Media Provokes Outrage*



Conservative personality Nick Adams tweeted "every American with half a brain should be outraged by M&M's going woke."

## Brand Clean Up

*Pivot to a New Campaign*



M&M's responded to the backlash by expressing their surprise and announcing they were pausing the use of their cartoon candies.

# There's More than One Type of Consumer Backlash and Each Type Represents a Different Level of Risk

## Types of Backlash:

Severity: 😞 Amplification: 📣

1

### Bad Experience

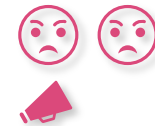
Consumers communicate frustration and unhappiness either directly to the brand or to others (i.e., word of mouth, social media).



2

### Breakup

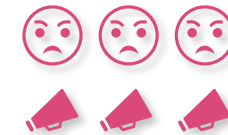
Consumers stop buying from the brand and look elsewhere for similar products/services.



3

### Boycott

Consumers stop buying from a brand and magnify feedback by instigating or joining a movement of other customers to encourage others to not use the brand.



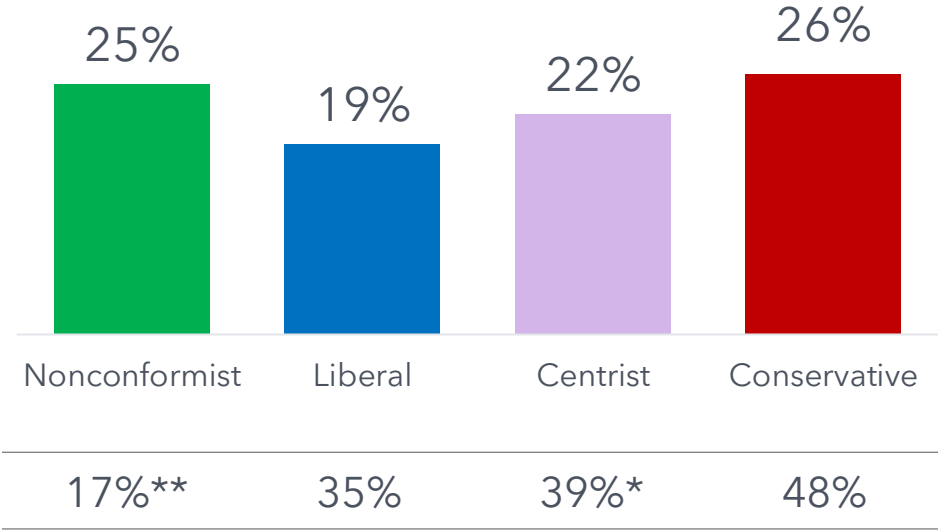
# Nearly a Quarter of All Consumers Say They Have Posted a Negative Comment about a Brand on Social Media

Older Conservative Consumers Are Significantly More Likely to Speak Out Online

Bad Experience

# 22%

of Americans have posted a **negative** comment or post about a brand on social media <sup>1</sup>



Because of the brand's **stance on a social or political issue** <sup>2</sup>



Source: Collage Group America Now Survey, August 2023, 13-77 respondents who have posted about a brand on social media, weighted data  
<sup>1</sup> Single select, % that selected "Negative" or "Both positive and negative"  
<sup>2</sup> Multiselect option  
\*Small sample size (between 31 and 60). Data should only be used directionally  
\*\*Extremely low sample size (30 or under). Projections are likely unstable, use with extreme caution  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

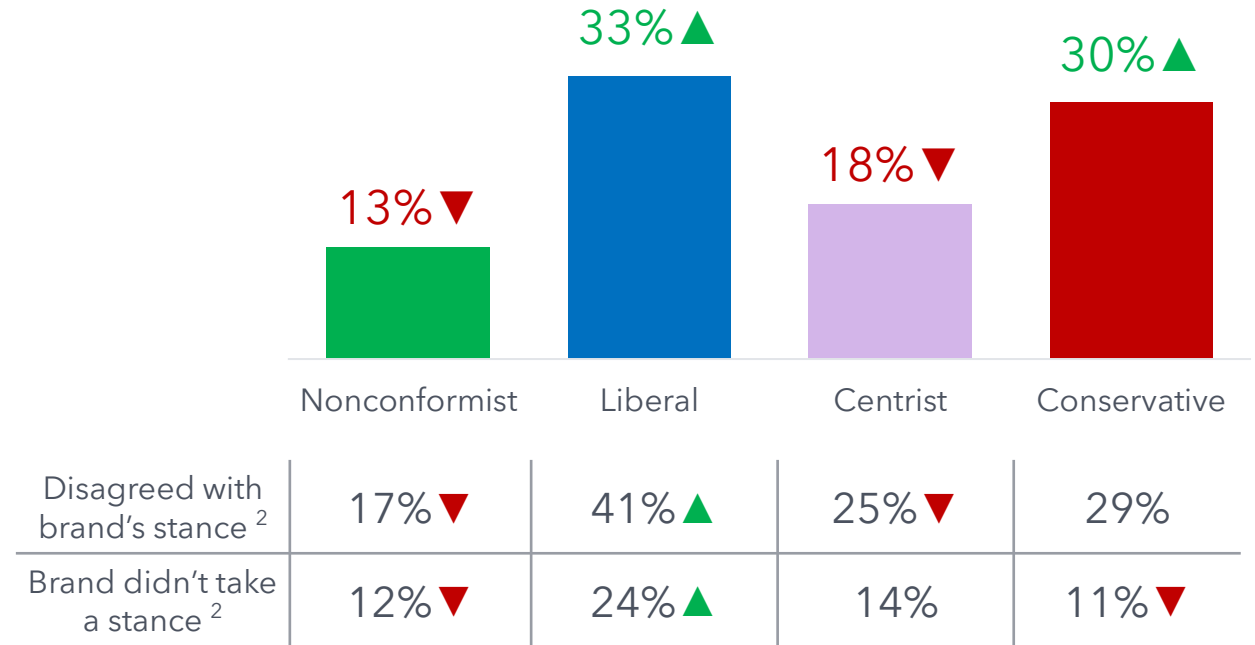
# A Quarter of All Consumers Have Stopped Buying from a Brand Because of the Brand's Stance on a Social/Political Issue

Liberals and Conservatives Are More Likely to Look for a New Brand than Centrists

Breakup

# 25%

of Americans have **stopped** buying from a brand because of their stance on a political or social issue this past year <sup>1</sup>



Source: Collage Group America Now Survey, August 2023, 13-77 population, weighted data  
<sup>1</sup> % Yes, Single select  
<sup>2</sup> Multiselect option  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.



# Nearly a Quarter of All American Consumers Have Boycotted a Brand Because of Its Stance on a Social/Political Issue

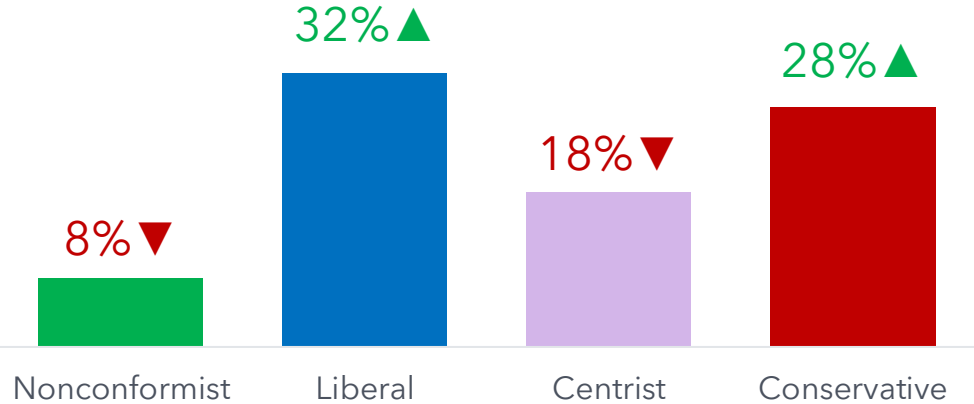
Consumers Who Identify as Either Liberal or Conservative Are Driving Participation in Brand Boycotts

Boycott

# 23%

(over 57 million people)

Americans have **boycotted** a brand because of its stance on a social or political issue.

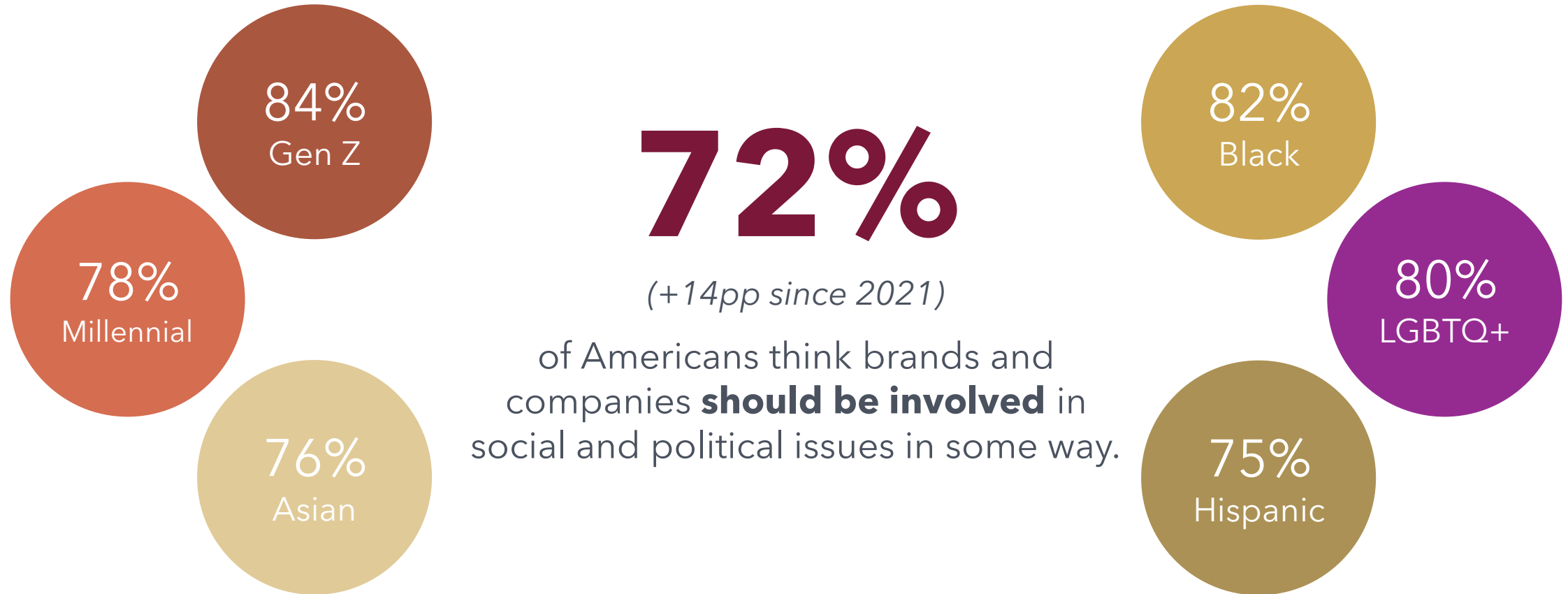


Source: Collage Group America Now Survey, August 2023, 13-77 population, weighted data  
1% Yes, Single select  
Question: "In the past year, have you stopped buying from a brand because of their stance on a political or social issue that is important to you?"  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

But don't let fear get in your way.

Consumers want you **ENGAGED.**

# Brands **Must** Get Involved in Social Issues to Engage High-Growth, Target Segments



# Engaging in Social and Political Issues Is the Path towards Long-Term Brand Growth

Growing Segments Want Brands to Dial in to Important Topics

# 23%

Americans have gone out of their way to **buy** from a brand because of their stance on an issue.

Multicultural <i>Hispanic</i>	Younger Gens <i>Gen Z, Millennial</i>	LGBTQ+
27% ▲	32% ▲	34% ▲




Source: <sup>1</sup> Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
18-77 population (Multicultural, LGBTQ+)  
Question: "In the past year, have you stopped buying from a brand because of their stance on a political or social issue that is important to you?"  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Consumers Want to See Advertising that's Authentic and Action that Brings Tangible Change

## Americans Warn Brands to Steer Clear of Performative Marketing Efforts

% of respondents that agree to the following statements

	Total Pop.
 <p><b>Brands should take real action</b> on issues if they want to mention those issues in their advertising</p>	60%
 <p><b>Too many brands haven't "done their research"</b> when attempting to incorporate diversity in their advertising</p>	53%
 <p>I don't trust brands that get involved in social issues if they <b>lack internal diversity</b></p>	47%

# Overcome the Divide by Understanding American Backlash:



**Backlash Is Inevitable:** The success of inclusive marketing has partially led to more backlash. Brands must understand the nature of that backlash to deal with it.



Sustained investment in more **inclusive marketing is working**. Satisfaction rates are up, so keep pushing and improving.



Backlash is inevitable, but it's not all the same. Familiarize yourself with the types of backlash and **protect your brand by knowing your risk and your audience**.



But **don't freeze in the face of backlash**. Inaction is the biggest risk. Growth will come by connecting with key consumer segments by engaging in social and political issues.



01

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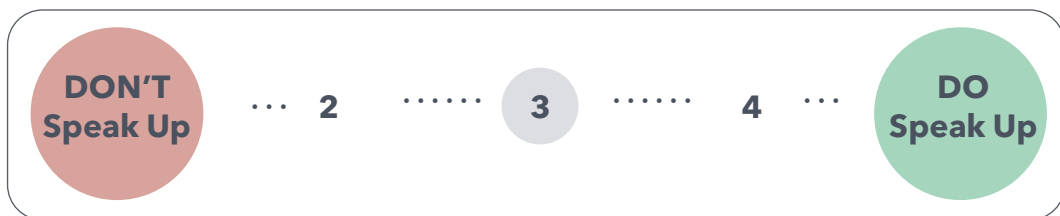
**Brands Must Engage**

*Bridge the Divide  
with Two Themes*

# We Asked Consumers Which Issues They Want to See Brands Address

Issues Include Both a Range of Topics and Different Positions on those Issues (i.e., Guns, Abortion)

How do you think brands should respond to the following issues with 1 meaning brands **SHOULDN'T** speak up and 5 meaning they **SHOULD** speak up?



- |                                     |  |
|-------------------------------------|--|
| Affordable health care              | Political correctness                        |
| Birth control and contraceptives    | Political polarization and extremism         |
| Climate change                      | Protecting access to abortions               |
| COVID-19                            | Protecting gun rights                        |
| Data privacy                        | Race relations                               |
| Election fraud                      | Restricting abortion rights                  |
| Free speech                         | Sexism                                       |
| Generative artificial intelligence  | Student loan debt                            |
| Immigrants and refugees to the U.S. | The gender pay gap                           |
| Inflation                           | The loneliness epidemic                      |
| Lesbian, gay, & bisexual issues     | The mental health crisis                     |
| Limiting access to guns             | The woke agenda                              |
| Mass incarceration                  | Transgender and non-binary issues            |
| Misinformation online               | Voting rights and encouraging people to vote |
| Police reform                       | Wealth inequality                            |



# And at First Glance, the Issue Preference List Provides a Clear Solution

Issues Given a Net Score Based on the Difference Between “Must Address” and “Don’t Address”

 **Stay Away!**  
+26 or lower

- 30. Restricting abortions (+1)
- 29. Protecting guns rights (+18)
- 28. Protecting abortions (+20)
- 27. Mass Incarceration (+21)
- 26. Immigrants & Refugees (+22)
- 25. Limiting access to guns (+22)
- 24. Student loan debt (+23)
- 23. The woke agenda (+25)
- 22. Artificial Intelligence (+25)

 **Meh...**  
+39 through +26

- 21. Police Reform (+27)
- 20. Political correctness (+27)
- 19. Transgender & non-binary issues (+28)
- 18. COVID-19 (+31)
- 17. Birth control & contraceptives (+31)
- 16. Wealth inequality (+33)
- 15. Lesbian, gay, & bisexual issues (+34)
- 14. Loneliness epidemic (+35)
- 13. Political polarization (+35)

 **Must Address!**  
+40 or higher

- 12. Climate change (+40)
- 11. Election fraud (+41)
- 10. Sexism (+42)
- 9. Gender pay gap (+43)
- 8. Race Relations (+46)
- 7. Voting rights (+51)
- 6. Affordable health care (+55)
- 5. Mental health crisis (+55)
- 4. Online misinformation (+59)
- 3. Free speech (+60)
- 2. Inflation (+62)
- 1. Data Privacy (+71)

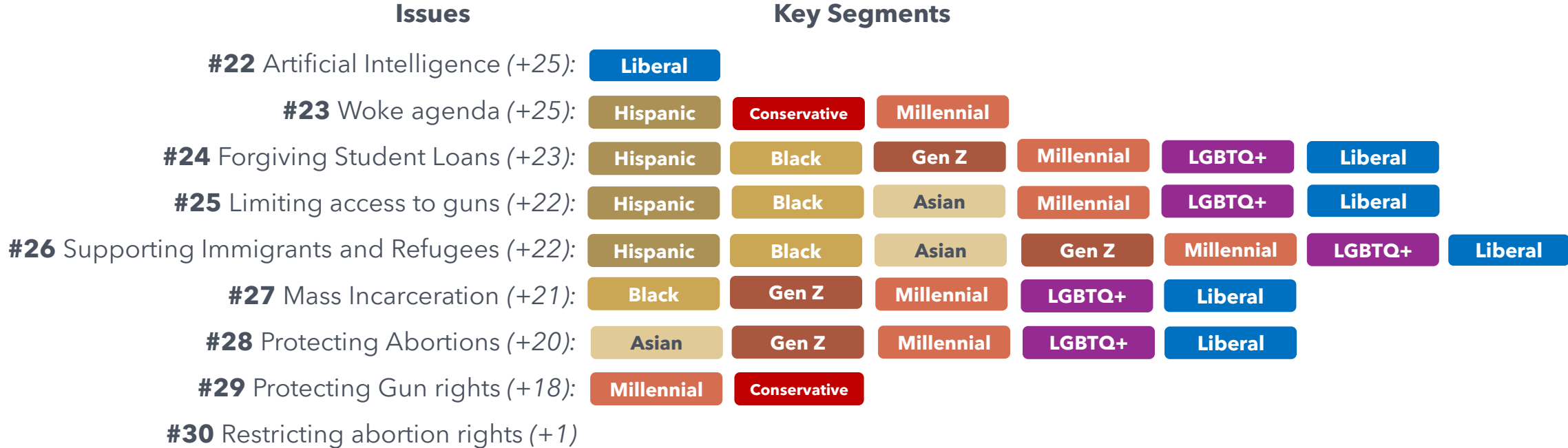
## Risk Level

# But a Closer Look Reveals Audience-Specific Preferences

Many “Don’t Address” Issues Do Have Receptive Consumer Audiences

Percentage who say brand SHOULD Address the issue (50% or more):

## Stay Away? It Depends Who You’re Talking to...



Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Net score = Top 2 box % minus Bottom 2 box %

# Simple “Issues Lists” also Don’t Work for Brands in the Real World

Most Brands Need to Address Issues across the Do-Don’t Spectrum

3 Theoretical Examples:



## Healthcare Brand

- Data Privacy
- Inflation
- Online misinformation
- The mental health crisis
- Affordable health care
- The loneliness epidemic
- Race Relations
- Sexism
- Lesbian, gay, and bisexual issues
- COVID-19
- Birth control & contraceptives
- Transgender & non-binary issues
- Abortion



## Retail / Apparel Brand

- Data Privacy
- Inflation
- Free speech
- Race Relations
- Sexism
- Wealth inequality
- Lesbian, gay, and bisexual issues
- Political polarization
- Transgender & non-binary issues
- Immigration

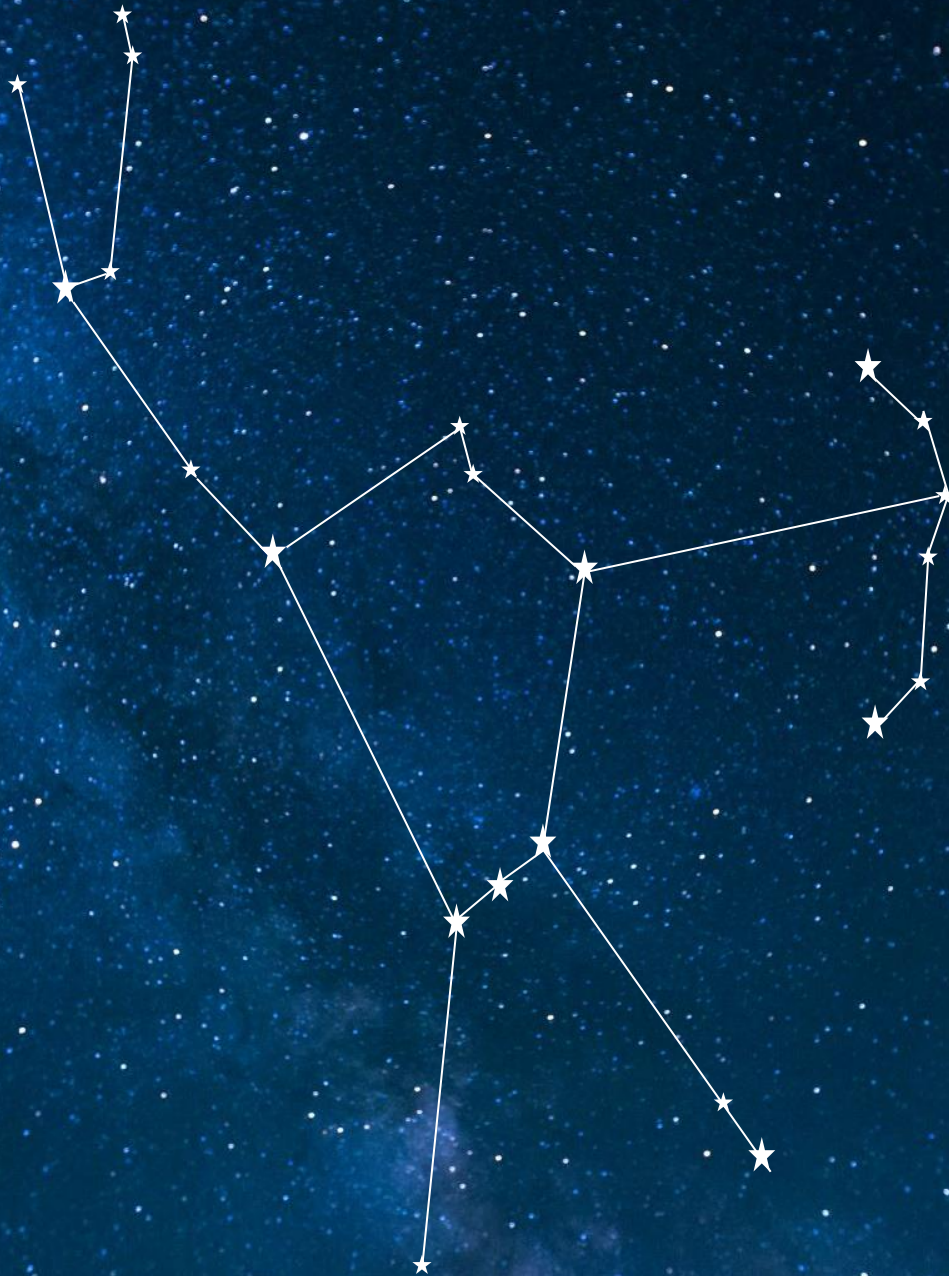


## Financial Services Brand

- Data Privacy
- Inflation
- Online misinformation
- Affordable health care
- Gender pay gap
- Race Relations
- Sexism
- Lesbian, gay, and bisexual issues
- COVID-19
- Wealth inequality
- Artificial intelligence
- Student loan debt

But, luckily, patterns  
provide a path.

Without seeing themes and  
underlying motivations behind  
consumer opinion, it just looks  
like frightening chaos.



# Two Themes Shine through Consumers' Demands for Issue-Based Marketing and Guide Brands Away from Backlash

Both Themes Are Both Safe from Backlash and Flexible

## Personal Protections

The world is a  
**scary place.**

Consumers want to  
hear how a brand will  
look out for them.

## Social Freedoms

The world is also an  
**unfair place.**

Consumers want  
brands to stand for  
equity, inclusion and  
the freedom  
to "be me."

A man with a beard and short brown hair, wearing a grey t-shirt, is smiling and looking down at a baby he is holding. The baby is wearing a blue long-sleeved shirt and is wrapped in a pink blanket. They are on a balcony with a white railing. In the background, there are pink flowers, a string of lights, and a brick wall. A blue circle is overlaid on the left side of the image, containing the text "Personal Protections".

# Personal Protections

# For Many Americans, Spooky Season Is Year-Round

From Tech Displacement to Economic Instability to Mental Health Woes, Threats Seem Endless

ECONOMY SEPTEMBER 11, 2023

**More U.S. Workers Fear Technology Making Their Jobs Obsolete**

**Health-Insurance Costs Are Taking Biggest Jumps in Years**

Employers and workers are expected to see an increase of about 6.5% or higher in health-plan costs next year

**The Biggest Hack of 2023 Keeps Getting Bigger**

Victims of the MOVEit breach continue to come forward. But the full scale of the attack is still unknown.

**New Surgeon General Advisory Raises Alarm about the Devastating Impact of the Epidemic of Loneliness and Isolation in the United States**

**Defeating inflation without higher unemployment is still unlikely**

Apr 30, 2023 - Politics & Policy

**America's youth fears for the future**



# Cultural Values Related to Helping Others Reflect Americans' Prioritization of Protection

**Supportive**

80%

*"I make an effort to be there for others when they need me."*

#3

**Family Focus**

80%

*"Family is one of the most important things in my life."*

#4

**Found Family**

74%

*"I consider someone 'family' if we are really close, even if we're not related."*

#9

**Responsible**

67%

*"I take it upon myself to look out for other people"*

#18

**Rank** (out of 75)





# The Personal Protections Theme Encompasses a Range of Issues Related to Fear and Safety

Related Issues Connect around Technology, Health, and Financial Sub-Themes

% Total Pop. agreement that a brand SHOULD address this issue:





# Two Consumer Fears Rise above the Rest: The Safety of Their Data and Online Misinformation

Both Issues Offer Low-Risk, Compelling Engagement across Consumer Segments

# 78%

**#1** Issue for  
**Total Pop.**

of Americans think brands should speak up about **protecting data privacy.**

**Backlash Risk:**

Low

**Key Segments:**

Boomer

Liberal

Centrist

# 70%

**#4** Issue for  
**Total Pop.**

of Americans think brands should speak up about **online misinformation.**

**Backlash Risk:**

Low

**Key Segments:**

Asian

Liberal



Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
18-77 population (Multicultural, LGBTQ+)  
Key Segments (other than Total Market): Confidence level 95% over Total Pop.

# Generative Artificial Intelligence Is an Emerging Driver of Americans' Tech-Related Fears

## T-Mobile Uses Deepfake Video to Educate Consumers about AI, Data Privacy, and Misinformation

How worried are you about Artificial Intelligence (AI) for the following scenarios?

% Somewhat worried, very worried

	Total Pop.
Increasing the risk of people's personal information being used without their permission	65%
Increasing the threat of online misinformation (e.g., deepfakes, digital distortion)	62%
Threatening people's jobs	61%



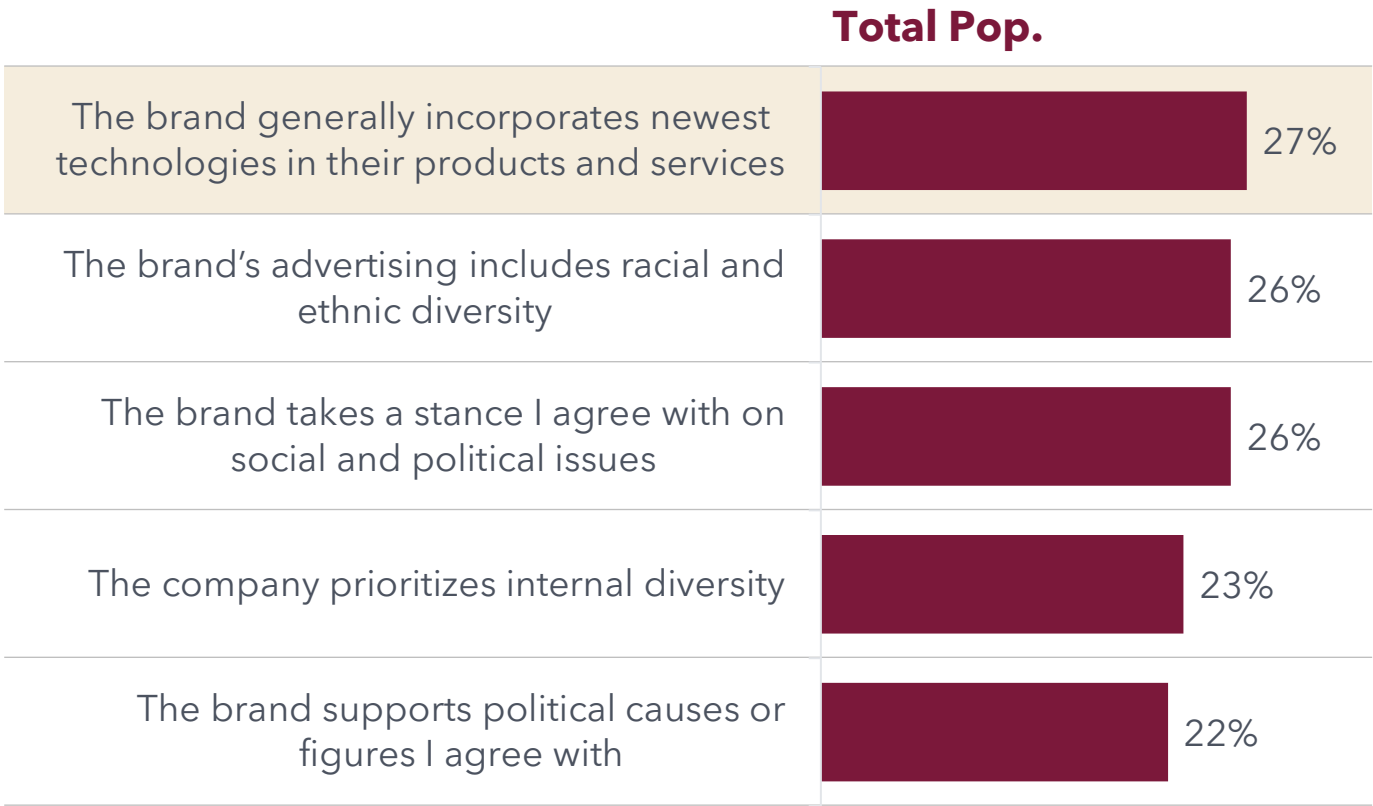
T-Mobile's "ShareWithCare" campaign informs consumers about the dangers of "sharenting." This allows them to connect with Older Gens and Parents by addressing their concerns about data privacy, misinformation, and AI through a thought-provoking deepfake video.

Nearly half of **Millennial** (46% ▲) and **Black Americans** (48% ▲) want brands to speak up about using Artificial Intelligence.

# But When Competently Marketed, Gen A.I. Becomes a Brand Growth Driver

## Use of New Technology Motivates Consumers to Engage with Brands

Top reasons consumers would **start** using or buying a brand:



**Hispanics** and **Asian** Americans especially want brands to introduce new technologies (32% ▲, 35% ▲)



Coca-Cola Creations, Cola-Cola's innovations lab, used AI to create a new futuristic flavor for Coke.



Source: [Coca-Cola](#); Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

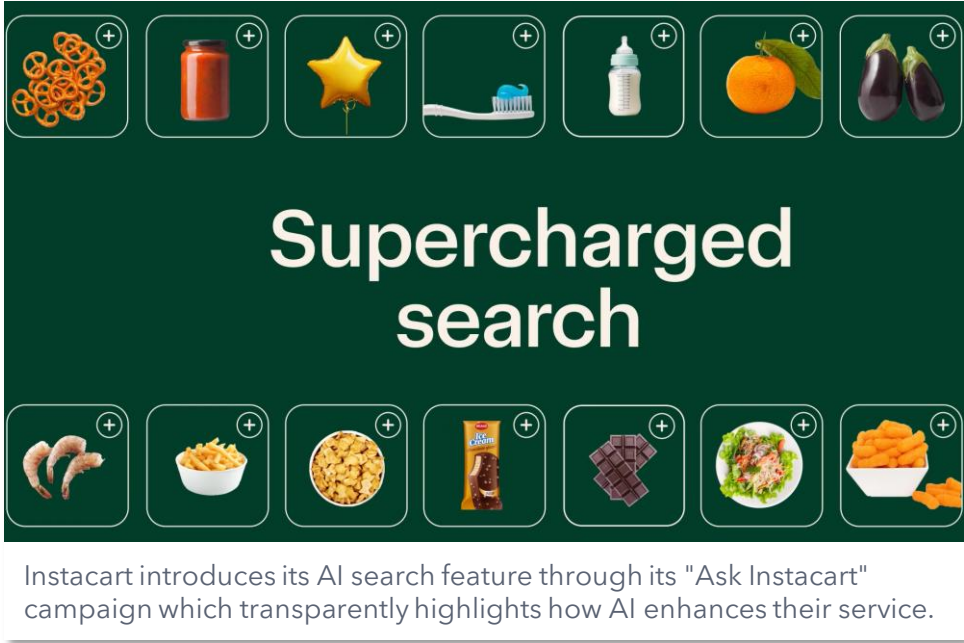
# But Beware of the Risks Associated with Using Artificial Intelligence

Brands Should Be Transparent and Monitor the Technology to Ensure Bias Aren't Propagated

According to a recent study on Generative AI...<sup>1</sup>

**70%** said brands should **disclose when AI has been used** to develop products, services, experiences and content.

**77%** agreed that brands must monitor the technology to **ensure it does not propagate existing biases** and inequalities.



The graphic features a dark green background with the text "Supercharged search" in white. Above the text is a row of seven icons: orange curly fries, a jar of red sauce, a yellow star balloon, a toothbrush, a baby bottle, an orange, and two eggplants. Below the text is another row of seven icons: shrimp, a bowl of french fries, a bowl of popcorn, a package of KitKat, a piece of chocolate, a salad, and a bowl of chicken wings. Each icon is enclosed in a white-bordered square with a small white circle containing a plus sign in the top right corner.

Instacart introduces its AI search feature through its "Ask Instacart" campaign which transparently highlights how AI enhances their service.



# Americans Want Brands to Address Holistic Health and Health Costs

# 67%

of Americans think brands should speak up about **the mental health crisis.**

Backlash Risk:

Low

Key Segments:

Hispanic

Gen Z

Millennial

Liberal

# 67%

of Americans think brands should speak up about **improving access to affordable health care.**

Backlash Risk:

Low

Key Segments:

Hispanic

Liberal

# 50%

of Americans think brands should speak up about **the loneliness epidemic.**

Backlash Risk:

Medium

Key Segments:

Hispanic

Millennial

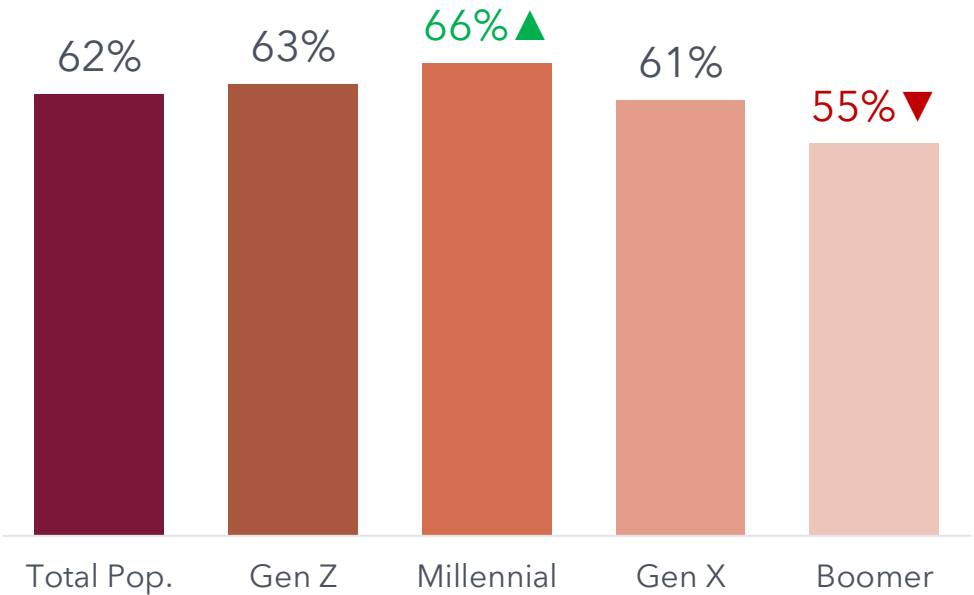
Liberal



Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Key Segments (other than Total Market): Confidence level 95% over Total Pop.

# Over Half of Americans Want to See Brands Reduce the Stigma around Mental Health

I wish brands were doing more to reduce the stigma around mental health



#TurnYourBack on Bold Glamour

No filter should tell you how to look.

54% of girls prefer the way they look when their photos are edited. It's no wonder their perception of beauty and their self-esteem are distorted. It's time to act. Join us at Dove.com

Dove Self-esteem project

Dove's #TurnYourBack campaign continues its ongoing work to dismantle toxic beauty standards by encouraging people to stop using beauty filters when posting on social media.

Dove's **B-CFQ\*** Ranking by Women **5th** out of 517 brands



Source: Dove; Collage Group Health & Wellness Survey, October 2023, 13-77 population, weighted data, % agree  
 Collage Group, CultureRate:Brand Studies, 2022 (18-76 population)  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

A photograph of three people sitting on a wooden bench outdoors, laughing joyfully. On the left, a Black man with a beard and a white t-shirt is laughing with his mouth wide open. In the middle, a Black woman with braided hair and a black top is smiling broadly. On the right, a white woman with sunglasses on her head and a black top is laughing. She is holding a small burger on a white plate. In the background, there is a stone wall, a window with a metal grille, and some corn on the cob on a table. A large yellow circle is overlaid on the left side of the image, containing the text 'Social Freedoms'.

Social  
Freedoms



# Americans Are Pushing for the Right to Be Themselves

Sometimes that Means Pushing Each Other

## Hello

My Name Is...

**Experts say attacks on free speech are rising across the U.S.**

**1 in 4 Transgender Adults Say They've Been Physically Attacked, New KFF/Washington Post Partnership Survey Finds**

**Florida's new standards on Black history curriculum are creating outrage**

**Black Americans more upbeat but fear worsening racism, poll finds**

**Florida's restrictive sex ed rules are causing back-to-school mayhem**

# Collective American Cultural Values Support the Drive to Live Authentically

**Honest**

82%

*"It's important for me to always be honest."*

#2

**Curious**

82%

*"If something interests me, I like to spend time learning more about it."*

#1

**Authentic**

72%

*"I actively try to live a life that is genuine and rooted in authenticity."*

#12

**Rank** (out of 75)



Source: Collage Group, Cultural Traits Study, January 2023 (13-77 population), weighted data % agree, strongly agree

# The Social Freedoms Theme Encompasses a Range of Issues Related to Removing Barriers to Authenticity

Related Issues Connect around Freedom of Speech, Race & Ethnicity, and Gender & Sexuality

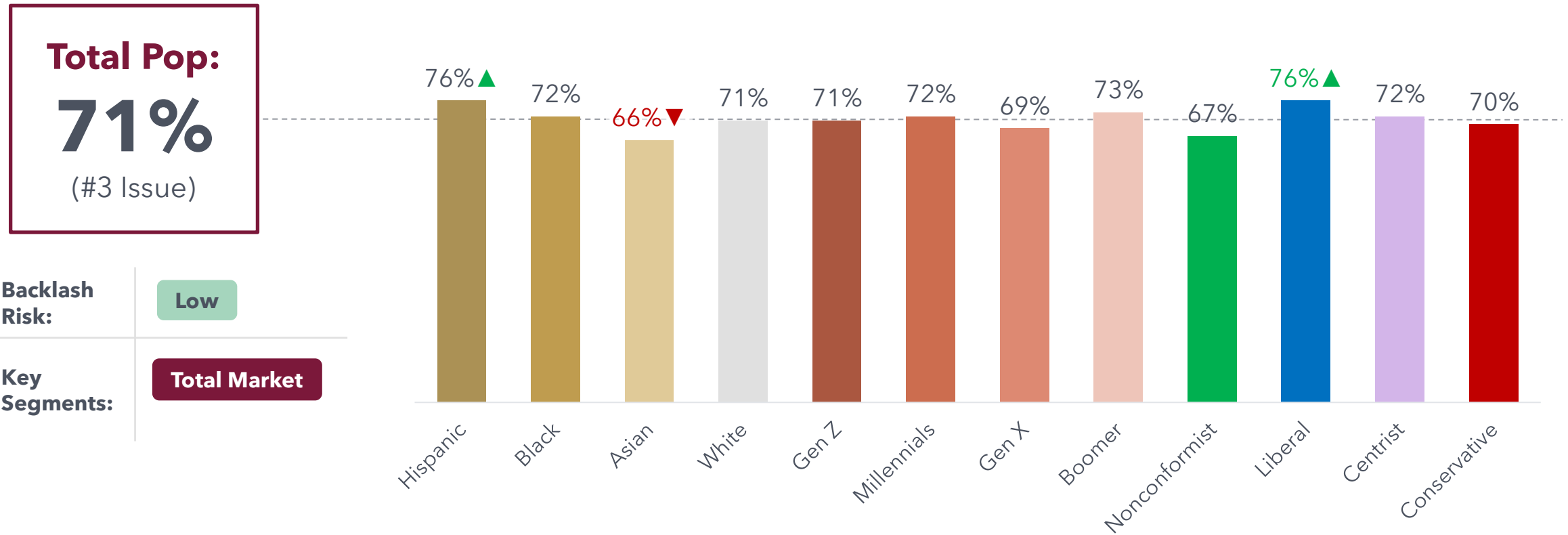
% Total pop. agreement that a brand SHOULD address this issue:





# Americans Agree that Freedom of Speech Is a Brand-Friendly Topic, So Frame Other Issues around the Right to Expression

% of Americans think brands should speak up about **free speech**.



Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
 18-77 population (Multicultural, LGBTQ+)  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.  
 Key Segments (other than Total Market): Confidence level 95%. over Total Pop.



# Since 2020, Improving Race Relations in the Country Has Been a Priority for Americans

And Brands Are Expected to Join the Conversation

# 61%

#8 Issue for Total Pop.

of Americans think brands should speak up about **improving race relations** <sup>1</sup>

Backlash Risk:

Low

Key Segments:

Hispanic

Black

LGBTQ+

Liberal



## Segment Breakdown

Hispanic	Black	Asian	White
69%▲	72%▲	61%	56%▼
Gen Z	Millennial	Gen X	Boomer
64%	63%	61%	57%▼
Nonconformist	Liberal	Centrist	Conservative
56%▼	77%▲	62%	50%▼

Potential for Backlash

Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Significance test: Confidence level 95%. ▲▼ over/under Total Pop. Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# “Race Relations” Is a Broad Term and May Lead to Brand-Specific Opportunities to Engage in Other Relevant Issues

Such as Wealth Inequality, Which Is an Important Issue for Multicultural and Younger Americans

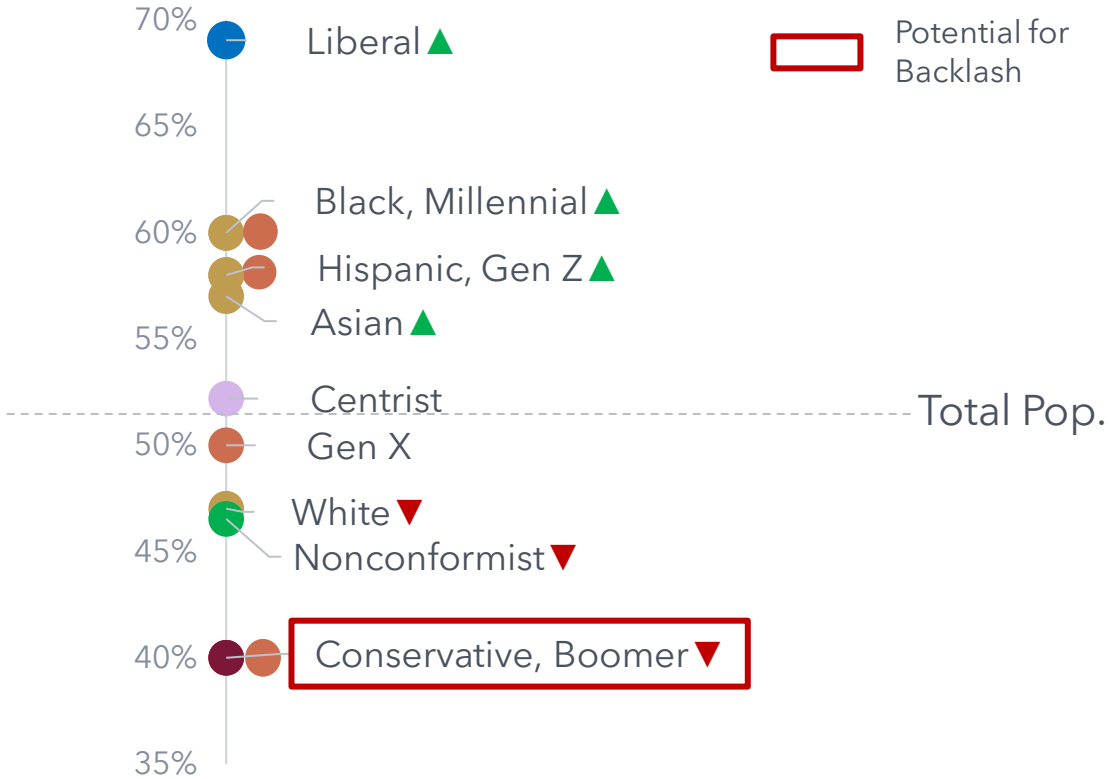
**52%** of Americans think brands should speak up about **Wealth Inequality (#16)**

**Backlash Risk:**

Medium

**Key Segments:**

- Hispanic
- Black
- Asian
- Younger Gens
- LGBTQ+
- Liberal



Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
 18-77 population (Multicultural, LGBTQ+)  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.  
 Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# Supporting Immigrants and Refugees Is Another Issue that Multicultural Americans Want Brands to Address, Especially Hispanics

However, Support for Immigrants Can Be a Divisive Subject

# 46%

of Americans think brands should speak up about **Supporting Immigrants and Refugees (#26)**



America's Voice reported that 700 paid ads viewed 52.6 million times on social media since 2017 are **anti-immigrant, divisive, and/or racist**. Many frame the immigration issue as an "invasion", fueling fear and anger.

Backlash Risk:

High

Key Segments:

Hispanic Black  
Asian Younger Gens  
LGBTQ+ Liberal

Segment Breakdown

Potential for Backlash



Hispanic	Black	Asian	White
57%▲	53%▲	53%▲	39%▼
Gen Z	Millennial	Gen X	Boomer
57%▲	50%▲	43%	35%▼
Nonconformist	Liberal	Centrist	Conservative
41%▼	66%▲	47%	32%▼



Source: [America's Voice](#); Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation)  
18-77 population (Multicultural, LGBTQ+)  
Significance test: Confidence level 95%. ▲▼ over/under Total Pop.  
Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# Most Americans, Especially Multicultural Americans, Expect Brands to Do More Internally and Externally to Address Racism

## Pepsi Co. Leverages Its Sports Partnerships to Help Support Migrant Communities

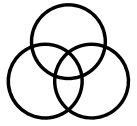
What should brands/companies do to address the problem of **racial inequality** in the U.S.?

		Total Pop.
	Commit to paying people the same salary regardless of their race or ethnicity	55%
	Commit to improving diversity in their organization's leadership	44%
	Provide better training to address implicit racial bias	43%
	Commit more time and money to diversity & inclusion initiatives within the company	37%
	Commit to hiring more people of color	37%



PepsiCo's Team of Champions initiative provides access to soccer for underserved and underrepresented soccer communities by making actionable investments on and off the field that helps create transformational change for **Hispanic** and **Black** youth, **Women**, and **Migrant** communities.





# Nearly 6 in 10 Americans Want Brands to Address the Gender Pay Gap and Sexism

These Issues Have Low Risk of Backlash

# 59%

of Americans think brands should speak up about the **Gender Pay Gap (#9)**

Backlash Risk:

Low

Key Segments:

Asian

LGBTQ+

Liberal

Centrist

# 58%

of Americans think brands should speak up about **Sexism (#10)**

Backlash Risk:

Low

Key Segments:

Black

Asian

Liberal

Younger Gens

LGBTQ+

**Conservatives** are the least enthusiastic about brands addressing Sexism (45% ▼)

Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop. Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# And the Support for Women Comes from Both Internal and External Brand Action

## Deloitte Celebrates Successful Women in Business and Partners with the WNBA

What should brands/companies do to address the issue of **sexism** in the U.S.?

	Total Pop.
 Commit to paying women and men the same salary for the same position	59%
 Train employees to recognize sexism in the workplace and confront it	52%
 Commit to hiring more women in leadership positions	42%
 Make statements addressing sexism	33%
 Donate money to organizations that fight against sexism	26%



Deloitte's partnership with the WNBA provides support for Women athletes while inspiring girls to play sports and reach for the stars in whatever career they choose. This resonates with **Gen Z** and **LGBTQ+** consumers.

# More than Half of Americans Want Brands to Address LGB Issues

# 54%

of Americans think brands should speak up about **Lesbian, Gay, and Bisexual issues (#15)**





**Backlash Risk:** Medium

---

**Key Segments:**

- Black
- Younger Gens
- LGBTQ+
- Liberal

## Segment Breakdown

 <b>Hispanic</b>	<b>Black</b>	<b>Asian</b>	<b>White</b>
55%	58%▲	57%	51%
 <b>Gen Z</b>	<b>Millennial</b>	<b>Gen X</b>	<b>Boomer</b>
61%▲	57%▲	51%	47%▼
 <b>Nonconformist</b>	<b>Liberal</b>	<b>Centrist</b>	<b>Conservative</b>
48%▼	72%▲	56%	39%▼
 <b>LGBTQ+</b>	<b>Non-LGBTQ+</b>		
74%▲	50%▼		

  Potential for Backlash

Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+)  
 Significance test: Confidence level 95%. ▲▼ over/under Total Pop.  
 Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# Half of All Americans Want Brands to Address Transgender and Non-Binary Issues

# 50%

of Americans think brands should speak up about **Transgender & Non-binary issues (#19)**

**Backlash Risk:**

Medium

**Key Segments:**

Black





Asian


Liberal

Younger Gens

LGBTQ+

## Segment Breakdown

 <b>Hispanic</b>	<b>Black</b>	<b>Asian</b>	<b>White</b>
52%	55%▲	55%▲	47%
 <b>Gen Z</b>	<b>Millennial</b>	<b>Gen X</b>	<b>Boomer</b>
57%▲	55%▲	47%▼	43%▼
 <b>Nonconformist</b>	<b>Liberal</b>	<b>Centrist</b>	<b>Conservative</b>
45%▼	70%▲	52%	34%▼
 <b>LGBTQ+</b>	<b>Non-LGBTQ+</b>		
69%▲	47%▼		

 Potential for Backlash

Source: Collage Group America Now Survey, August 2023, weighted 13-77 population (Total Pop., Generations, Political Affiliation) 18-77 population (Multicultural, LGBTQ+) Significance test: Confidence level 95%. ▲▼ over/under Total Pop. Key Segments (other than Total Market): Confidence level 95%. over Total Pop.

# Transgender Issues Reflect National Political Polarization

But, Support from Growth Segments Gives Brands More Room than They Might Expect

## Conservatives

**37%**

think brands **should NOT** address transgender and non-binary issues.

**38%**

feel **NEGATIVELY** when LGBTQ+ are represented in ads.

## Liberals

**70%**

think brands **SHOULD** address transgender and non-binary issues.

**56%**

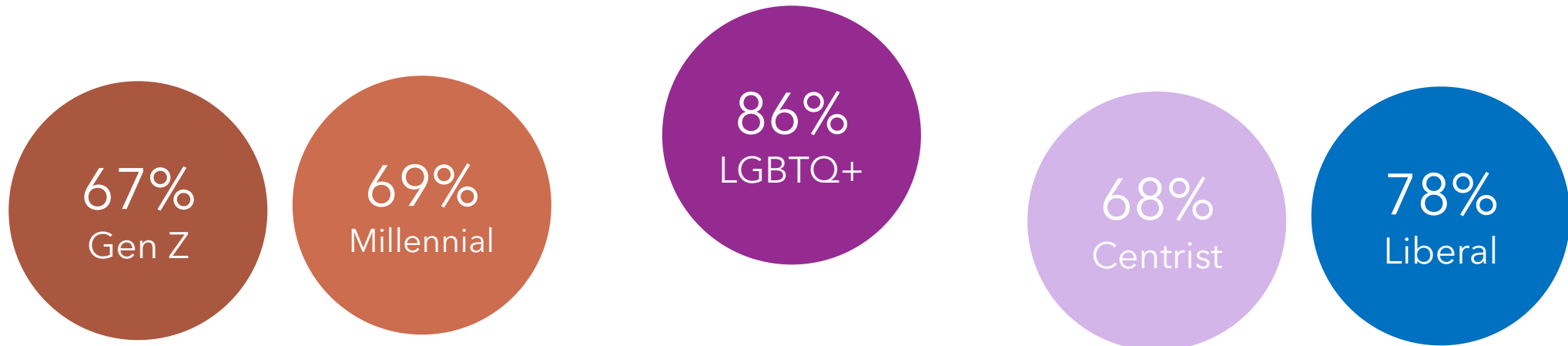
feel **POSITIVELY** when LGBTQ+ are represented in ads.

# But Most American Consumers Want to See Brands Stay True to Transgender and Non-Binary Support

Messaging Reversals Will Inspire New Backlash

# 63%







of Americans say a brand that has committed to Transgender messaging should **stick with it**, through the backlash.



# Consumers Want Brands that Address LGBTQ+ Issues to Focus on Education and Internal Investments

Adidas Celebrates Powerful Women, Including Transgender Athletes, Winning Over Diverse Audiences

What should brands/companies do to address the issue of **LGBTQ+ rights** in the U.S.?

		Total
	Educate their staff	43%
	Educate their consumers	35%
	Commit to hiring more LGBTQ+ people	31%
	Encourage staff to include their preferred pronouns	29%
	Make statements	28%
	Donate money to organizations	26%



In Adidas' Impossible Is Nothing campaign the brand shows support for underrepresented communities, built on years of challenging the status quo, and ties it to **Values** resulting in an activation that connects with **Women** and **LGBTQ+** Americans.

Adidas  
 "Impossible is Nothing"  
**A-CFQ\***  
 Ranking  
 by **LGBTQ+**

**2<sup>nd</sup>**  
 out of  
 126 ads



Source: [Adidas](#); Collage Group America Now Survey, August 2023, 13-77 population, weighted data, Multiselect  
<sup>2</sup> CultureRate: **Ad** February 2022-July 2023  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Overcome the Divide by Understanding American Issues:



**Brands Must (and Can) Engage:** Consumers still demand brands engage in issues, so to grow your brand you must strategize around powerful-yet-unifying themes of *Personal Protections* and *Social Freedoms*.



**Communicate across broad themes** rather than getting bogged down in single issues. Don't shy away from addressing social/political issues that fit your brand's values and strategy.



Speak to Americans' desire for **Personal Protections**: The world feels like a scary place right now and consumers want to know how you plan to look out for them.



Advocate for American's **Social Freedoms**: Not everyone agrees about the specifics of modern inclusion, but most want the freedom to "be me."



Questions?



# As You Navigate towards Growth this Year, Remember:

↓  
— **Polarization Is Permanent:** Political ideology now plays a bigger role in American consumers' identities, so brands must understand how that translates to personal values.

↓  
— **Backlash Is Inevitable:** Success towards inclusive marketing, sadly, has also led to more backlash, so brands must understand the nature of that backlash to deal with it.

↓  
— **Brands Must (and Can) Engage:** Consumers still demand brands engage in issues, so to grow your brand you must strategize around powerful-yet-unifying themes of *Personal Protections* and *Social Freedoms*.

# Appendix

# Collage Group America Now Survey, Fielded August 2023

## 18-77 Unweighted Survey Sample Breakdown, n=4,678

<b>Race/Ethnicity</b>		<b>Gender</b>		<b>Generation</b>	
Hispanic	1217	Woman	2,386	Gen Z	965
Black	820	Man	2,262	Millennial	1,298
Asian	520	Non-binary / other	30	Gen X	1,163
White	2031			Boomer	1,252
<b>Hispanic Acculturation</b>		<b>LGBTQ+</b>			
Acculturated	414	LGBTQ+	640		
Bicultural	501	Non-LGBTQ+	4,038		
Unacculturated	302				

*Please note that data present in this report is weighted to be nationally representative of Race/Ethnicity, Hispanic Acculturation, Age, Gender, and Sexuality.*

