



# The “AND” Era

Americans aren't one thing  
or the other, they're both

Harris Poll Thought Leadership Practice | June 2023

# Introduction

The future is unfolding with more complexities and confusion than ever before. Meanwhile, people feel like their choices and opinions live on an illusionary binary, forcing them to choose one box or the other. But in today’s world, we can forge a different pathway where we can acknowledge that two things can be true simultaneously.

**It is true that we are experiencing both:**

- Layoffs in some industries **AND** labor shortages in others
- Lowest unemployment in 50+ years **AND** the looming potential of a recession
- Tightening wallets **AND** luxury splurging

These realities go beyond check-boxes to acknowledge the inherent duality of man; meaning the psychologically confusing nature of mankind is twofold. It’s these tensions – the superhero vs. villain, love vs. war, the feelings of bittersweet – that are at the heart of what makes humans, brands, and experiences fascinating.

In today’s world, people are often looking for a clear, simple answer. Yet what is missing from the dialogue is the acknowledgment that many of these seemingly contradictory realities coexist. We are entering the “And” Era, moving beyond the binary to accept more nuanced realities. This research explores six such dualities and what they look like for consumers today.



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Special thanks to Tim Osiecki and Andrew Narvaez for contributing to the research development.



The emerging dualities across our lives, consumers are both...

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**Money: Splurgy & Stingy**

**Work: Quiet & Loud**

**Activism: Protesters & Pacifists**

**Outlook: Nostalgic & Futuristic**

**Business: Big Stability & Small Saviors**

**AI: Automated & Human**

# Splurgy



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# Stingy



# Splurgy & Stingy

Consumers are embracing a “split-brain budget” – cutting back on basics but making room for personal luxuries. Think shopping for single-ply toilet paper while wearing Gucci loafers. Gen Z says luxury goods are more tangible than more “traditionally responsible” investments, like mortgages.

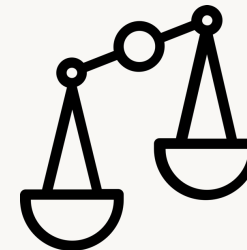
While this may seem contradictory, it speaks to a greater intentionality in spending that we have seen post-pandemic. Consumers are living for today and making room for what matters to them.

What this means for brands → don't find yourself in the middle of this mindset.

*“Right now, buying a Cartier watch is a way more tangible investment because once I've bought it it's mine – you can't say the same for a mortgage.” - Gen Z in the UK*

63%

of Americans agree, “I'm not going to deprive myself the comforts of life now for a future that feels like it could change at any moment.”



**69% say, “I have cut out more ‘in-between’ spending** (i.e., cutting out things I don't care about that much in order to splurge on something I really care about and cover basic needs).”

# Splurgy

70%

of Gen Zs and Millennials have found ways to splurge on themselves, such as:



High-quality home items (33%)



Upgraded hotel accommodations (23%)



Luxury fashion item (31%)



Premium dining experiences (22%)



Luxury beauty products (27%)



Premium gym equipment or memberships (21%)

68% of Gen Zs and Millennials say, “I deserve to treat myself to more expensive purchases after surviving the last few years.”



# Stingy

86%

of Gen Zs and Millennials have made efforts to save on everyday spending, such as:



Shopping at dollar stores (47%)



Reduced transportation expenses (30%)



Sought out more deals or coupons (47%)



Shared passwords on streaming services (24%)



Opted out of more social event (35%)



Bought day-old food (24%)

65% of Gen Zs and Millennials would rather cut back on spending on everyday basics to be able to afford the occasional splurge.

# Quiet



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# Loud

# Quiet & Loud

In our conversations with people, we found the term “quiet quitting” was anything but “quiet.”

Americans are protesting the system by retreating into a zone of safety. They don't see it as a reflection of being “lazy,” they see it as an appropriate reaction to an uneven system. In the words of one salon participant, this movement is about “stopping an extractive, exploitative workforce to question the value exchange.”

It's worth noting while people are actively prioritizing their lives, they are still actively passionate about their work and upskilling. They can do both.

To do their job more effectively, employees are looking for more meaningful investment in boundaries and opportunities to become more well-rounded (not surface-level gestures)

Employer actions that would improve engagement:

4-day work week 69%

Personal development / education budget 69%

Mental health support 69%

Dedicated work time to pursue other interests 61%

No official work hours 59%

Having clear offline boundaries 55%

Massages and yoga 45%

Daily pints of ice cream 34%



70%

“Quiet quitting is actually a loud statement by employees about what they are looking for.”

*“Experience in the workplace or society has felt dehumanizing (e.g., teachers, healthcare workers)...retirement, nothing adds up.” - Salon participant*

# Quiet & Loud

83% "I am making an effort to avoid making work my whole life."

**AND**

82% "I am passionate about my work."

88% "I don't want all my free time to be consumed by my work."

**AND**

76% "I plan to continue building career skills in my free time."

"Having interests separate from my job (88%) and having time away from my job (86%) helps me do my job better."



# Protesters



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# Pacifists

# Protesters & Pacifists

From cancel culture to rage-Tok, Americans are imbued by frustration over the state of affairs. Adrenals are pumping for Millennials, as they say, nothing has felt stable in the last 20 years and they are already exhausted imagining what might happen next.

Yet, at the same time, there is a realization that it won't be a death match that saves us, instead, acceptance, kindness, and a connection back to humanity is the only path forward.

While we need the mega-phones to call out bad actors and policies, we also need new pathways toward achieving peace. And the only way to achieve peace is through peace.

## Chronic instability peaks fatigue

51% say, "Nothing has felt stable since 9/11."<sup>58%</sup> MILLENNIALS

55% say, "I'm pre-exhausted about what is the next thing that will drop out of the sky."

<sup>65%</sup> MILLENNIALS

50% agree, "It's essential to get angry about issues in order to drive change."<sup>57%</sup> DEMOCRAT

76% agree, "Kindness will ultimately help us overcome polarization in America."

90% agree, "We need to get back to what makes us universally human."












87% agree, "Kindness is essential to solving societal issues and driving meaningful change."

# Protesters

## MACRO-ANGER

95%

are frustrated about the state of at least 1 issue in America, including:

-  Inflation (83%)
-  Gun violence (73%)
-  Homelessness (65%)
-  Judicial system (65%)
-  Healthcare system (62%)
-  Lack of affordable housing (59%)
-  Abortion rights (59%)
-  Climate change (56%)
-  Stagnant wages (51%)
-  Student debt (42%)
-  LGBTQ rights (41%)



# Pacifists

## MICRO-KINDNESS

93%

have participated in acts of kindness, including:

-  Let someone else have the right of way when driving (78%)
-  Given a stranger a compliment (69%)
-  Picked up litter in a public space (61%)
-  Donated food to someone in need (58%)
-  Anonymously donated money to a cause you care about (47%)
-  Donated time to a cause you care about (46%)
-  Bought coffee or food for a stranger (41%)

### Counterintuitive duality: Safe spaces breed (healthy) disagreement

*“Community has the power to ‘shift my world view’ intimate, safe space for opposing viewpoints and discussion to expand my potential for compassion and understanding.” - Salon Participant*



# Nostalgic



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# Futuristic

# Nostalgic & Futuristic

Y2K fashion, 90s Con, and teen luddites, young people feel nostalgic for a simpler time—when connection was human-first versus digital-first.

At the same time, young Americans are diving into digital spheres, crafting their digital-first identities, launching careers, and growing influential communities in increasingly immersive spaces.

As tech becomes as ubiquitous as the air we breathe, we see a pushback and a push forward.

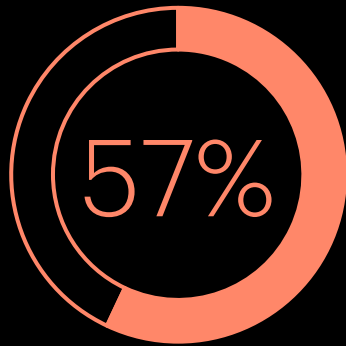
In the meantime, this feeling of being stuck between eras of change is creating a need to escape the pressures of today.

Americans are taking action to escape the complexities and pressures of today's world

87% Watch movies or TV shows	76% Go to a quiet place alone	69% Have chocolate / dessert
68% Scroll on social media	61% Play video games	53% Avoid paying attention to the news
50% Turn off my phone / go on do not disturb mode	46% Read fiction books	43% Have a glass of wine



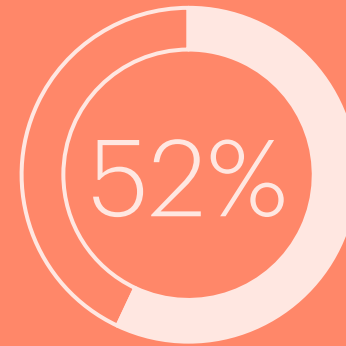
# Nostalgic



“Thinking about the past makes me less stressed about today.”

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# Futuristic



“Thinking about the future makes me less stressed about today.”

The current chaos happening today makes me optimistic something must change (69%) AND makes me concerned that nothing will change (73%).

# Big Stability



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# Small saviors

# Big stability & Small saviors

With layoffs and innovation drawbacks in big business, entrepreneurially-minded folks are stepping in to fill the gaps. And they believe they can both create impact while earning profits.

We see Americans overall hedging their bets, looking toward big business for job security, while still believing in the importance of supporting small businesses.

Our Gen Z salon participant described it this way: “When I worked for a start-up, I wore a ton of hats and worked around the clock, it’s why I prefer to work at a larger company I know my role and I can attain more work-life balance in the process.”

63%

of tech workers have started their own company post-layoff

59% of employed Americans agree, “I would rather work at a big company for job security.”

36% MILLENNIAL | 42% GEN Z

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89% agree, “I believe in the power of small business and want to support them.”

## PURPOSE MEETS PROFITABILITY

48% agree, “If I started a business today it would help solve a societal issue or gap.”

AND

49% agree, “If I started a business today I would be able to make it profitable in 12 months.”



AI

# Automated



# &



# Human

# Automated & Human

The debate of humans versus machines goes back hundreds of years. Its latest battleground is AI, an explosive topic ranging from the end of humanity to the beginning of a new growth era.

In a new AI era, we may find genuine creativity and human connections to become more valued. Or we may find ourselves under the thumb of a complex rationalizing machine, being sorted through a system that callously restructures our purpose in the world.

Either way, people, especially Millennials are working through their feelings about the life-altering wave of technology, to embrace the upside, while protecting their backs.

## GREAT AI EXPECTATIONS

69%  
Mill

"AI will unleash an abundance of creativity."

71%  
Mill

"Algorithms fuel my interests."

62%  
Mill

"It would be a good thing if AI challenges our current systems/ways of working."

AND

AND

AND

## GREAT AI TREPIDATION

69%  
Mill

"AI will kill creative industries."

65%  
Mill

"Algorithms don't really understand me."

73%  
Mill

"I am nervous about the change AI could bring to our society."

*"Algorithms aren't scary, they are a source of personal inspiration. It brings you insight into what you might find as personal growth levers, new communities that might interest you, points of transformation, new thinkers and ideas." - Salon Participant*





Our thought leadership practice helps clients navigate the nuanced nature of the market to get ahead of what's next

## **HARRIS POLL THOUGHT LEADERSHIP PRACTICE**

Building on 50+ years of experience pulsing societal opinion, we design research that is credible, creative, and culturally relevant. Tap into a proven approach for building credible and authentic brand authority.

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### **About Harris Poll Thought Leadership Practice**

Building on 50+ years of experience pulsing societal opinion, we design research that is credible, creative, and culturally relevant. Our practice drives thought leadership and unearths trends for today's biggest brands. We are focused on helping our clients get ahead of what's next.

### **Methodology**

This report is based on a custom survey that was conducted online within the United States by The Harris Poll in three waves among adults aged 18 and over: between May 5-7, 2023, among 2,102 respondents, May 12-14 among 2,019 respondents, as well as May 19-21 among 1,243 respondents. We also conducted salon sessions March 24-25, 2022, which focused on what it means to live a well-lived life.