

EXPRESSIONS OF IDENTITY – US – 2024

Multifaceted self-expression continues to be a primary aspect of identity for consumers, directly impacting their mental wellbeing and undeniably involving brands.



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Expressions Of Identity - US - 2024

This report looks at the following areas:

- Consumers' outlook on personal identity and the importance of self-expression
- The role of outer appearance in self-expression and important aspects of personal style
- The evolution of and greatest influences on personal identity and sense of self
- The role that brands play in consumers' self-expression and self-esteem
- The challenges consumers face in understanding and representing their identity, and the opportunities for brands to support consumers' sense of self

Overview

As American society has become more diverse, informal and social media-centered, more consumers are **embracing and prioritizing personal self-expression**. Mintel data shows that communicating one's authentic identity to the world around helps validate a person's sense of self, enables further self-discovery and can directly improve consumers' mental wellbeing and self-worth.

Through outer appearance and other intangible aspects of identity, **consumers explore, experiment and celebrate their evolving sense of self**. Brands undeniably play a role in consumers' self-expression, acting as indicators of status, persona, and personal values; though certain consumer groups rely more on brands than others. Mintel's custom **Self-**



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Expression Target segment is a key audience for brands looking to connect with consumers through personal identity and self-expression. This consumer groups account for 35% of the population, and skews young and multicultural.

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Report Content

EXECUTIVE SUMMARY

- What you Need to Know
- Consumer Trends: Key Takeaways
- Future Outlook of Consumer Self-Expression
- Opportunities

MARKET

Market Context and Drivers

- The vast majority of consumers prioritize self-expression and their outer appearance
 - Graph 1: importance of outer appearance in self-expression, 2023
 - Graph 2: importance of expressing oneself to the world around, 2023
- Diversifying population and embracing of identity
- Social media and influencer culture
- Casualization of everyday life
- Younger generations are more attuned to their self-expression and the use of their outer appearance
 - Graph 3: self-expressive and use outward appearance, by generation, 2023
- Brands can connect with multicultural consumers by appealing to individuality and unique self-expression
 - Graph 4: self-expressive and use outward appearance, by parental status, LGBTQ+ identity, area of residence, 2023
 - Graph 5: self-expressive and use outward appearance, by race and Hispanic origin, 2023

TARGET AUDIENCE

Self-Expression Consumer Segments

- Nearly half of consumers are Expressive and Experimental
 - Graph 6: self-expression consumer segments, 2023
- Expressive and Experimental consumers are young and multicultural
- Expressive and Experimental consumers are a key target for brands appealing to individuality and unique expression
- Confident and Distinctive consumers skew middle-age and Black
- Though not a key consumer audience, Confident and Distinctive consumers still hold opportunities for brands
- Consistent and Reserved consumers are most likely to be retired Boomers
- The Consistent and Reserved segment are less likely to hold opportunities for brands
- Expressive and Experimental consumers are most likely to prioritize their self-expression and outer appearance
 - Graph 7: self-expressive and use outward appearance, by self-expression segments, 2023
- Mintel's custom Self-Expression Target consumer segment makes up 35% of the total population

- Graph 8: Self-Expression Target Consumer, by key demographics, 2023

CONSUMER INSIGHTS

Consumer Fast Facts

Philosophy & Outlook on Personal Identity

- Authentic self-expression and strong sense of self can directly impact a person's mental health
 - Graph 9: agreement - "It's important to have a strong sense of self," by Self-Expression Target Consumer, 2023
 - Graph 10: agreement - "Self-expression can improve a person's mental wellbeing," by Self-Expression Target Consumer, 2023
- Self-expression through outer appearance, in particular, can impact mental wellbeing
- Consumers can be self-confident while still figuring out who they are
 - Graph 11: self-described self-confidence, by Self-Expression Target Consumer, 2023
 - Graph 12: personal sense of self, by Self-Expression Target Consumer, 2023
- Brands can help LGBTQ+ and Hispanic consumers explore and understand their identity while also increasing their sense of self-confidence
 - Graph 13: self-described self-confidence, by gender, LGBTQ+ identity, and by race and Hispanic origin, 2023
 - Graph 14: personal sense of self, by gender, by LGBTQ+ identity, and by race and Hispanic origin, 2023
- Good Weird encourages Gen Z to embrace the weird

Evolution & Influence on Identity

- Self-Expression Target consumers are more likely to view personal identity as dynamic and evolving throughout life
 - Graph 15: agreement - "I believe a person's identity changes throughout life," by Self-Expression Target Consumer, 2023
 - Graph 16: agreement - "Major life milestones can change or adjust a person's identity," by Self-Expression Target Consumer, 2023
- Young and LGBTQ+ consumers are more likely to view personal identity as an evolution
 - Graph 17: agreement - "I believe a person's identity changes throughout life," by key demographics, 2023
- Brands can help consumers navigate pivotal life milestones and the effects they can have on their sense of self
- Childhood upbringing and family dynamics are considered to have the largest influence a person's identity
 - Graph 18: ranking of largest influences on identity and current sense of self, 2023
- Older consumers emphasize the influence of their family and childhood, while younger generations point to their life experiences
 - Graph 19: ranking of largest influences on identity and current sense of self, by generation, 2023
 - Graph 20: ranking of largest influences on identity and current sense of self, by gender, by LGBTQ+ identity and parental status, 2023
- Brands can offer affirming experiences tailored to less conventional lifestyles

Self-Expression Through Appearance

- Outer appearance plays an integral role in consumers' self-expression

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- Black, Hispanic and LGBTQ+ consumers are some of the most likely to prioritize outer appearance in their self-expression
 - Graph 21: importance of outer appearance in self-expression (very or somewhat important), by key demographics, 2023
- Outer appearance and mental health share reciprocal benefits
 - Graph 22: actions regularly taken to improve/maintain mental health and wellbeing, by Self-Expression Target Consumer and by key demographics, 2023
 - Graph 23: agreement - "My appearance and the way I present myself can affect my mental wellbeing," (any agreement), by Self-Expression Consumer Target and by key demographics, 2023
- Gymshark demonstrates the adage "feel good, look good," as well as "look good, feel good"
- For many consumers, changing and experimenting with their personal style is part of their journey to self-discovery
 - Graph 24: agreement - "I like to experiment with my personal style/outward appearance," (any agreement), by Self-Expression Target Consumer and by key demographics, 2023
- By enabling self-discovery, brands can become emotionally embedded in consumers' sense of self
 - Graph 25: consistent vs evolving personal style, by Self-Expression Target Consumer and by generation, 2023

Aspects of Outer Appearance

- Most aspects of outer appearance hold some degree of importance in consumers' self-expression, increasing the possibilities for brand activations
 - Graph 26: importance of aspects of physical appearance, (any importance) by Self-Expression Target Consumer, 2023
- Aspects of visual aesthetics are more important for women and LGBTQ+ consumers, while brand names are more important to men
 - Graph 27: importance of aspects of physical appearance (any importance), by gender and by LGBTQ+ identity, 2023
- Hispanic consumers prioritize many different aspects of physical appearance
 - Graph 28: importance of aspects of physical appearance (any importance), by race and Hispanic origin, 2023
- Otterbox and Chillhouse partner to launch a phone case and press-on nail combo

Other Modes of Self-Expression

- After physical appearance, brands can also appeal to consumers' sense of self through their hobbies and personal interests
 - Graph 29: expression of identity aside from physical appearance (any rank), by Self-Expression Target Consumer, 2023
- Digital spaces are key for many consumers' self-expression
 - Graph 30: feeling more authentic interacting in-person vs interacting virtually, by key demographics, 2023
 - Graph 31: feeling more authentic interacting in-person vs interacting virtually, by Self-Expression Target Consumer, 2023
- By partnering with musical artists, media companies or digital influencers, brands can appeal to the intangible aspects of consumers' identity
 - Graph 32: expression of identity aside from physical appearance (any rank), by generation, 2023
 - Graph 33: expression of identity aside from physical appearance (any rank), by gender and by LGBTQ+ identity, 2023
- Warby Parker pursues Gen Zs through partnership with influencer Emma Chamberlain
- Many young, LGBTQ+ and male consumers struggle to express their authentic selves at work

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- Graph 34: agreement - "It can be challenging to express my authentic self at work," by Self-Expression Target Consumer and by key demographics, 2023

Self-Expression & Brands

- Brands undeniably play a role in consumers' self-expression and self-confidence
- Self-Expression Target consumers, especially young and multicultural consumers, rely on brands to express who they are
 - Graph 35: agreement - "Certain brands I use or wear make me feel more self-confident" (any agree), by Self-Expression Target Consumer and by key demographics, 2023
 - Graph 36: agreement - "Certain brands help me express myself" (any agree), by Self-Expression Target Consumer and by key demographics, 2023
- Brands must remain aware and respectful of the complex and multifaceted nature of consumers' identity
 - Graph 37: implications of brands people wear, by Self-Expression Target Consumer, and by gender and LGBTQ+ identity, 2023
- Gen Zs, Millennials and Asian consumers are more likely to rely on brand names and recognition to understand themselves and others
 - Graph 38: implication of brands people wear, by generation, 2023
 - Graph 39: implication of brands people wear, by race and Hispanic origin, 2023
- Brands that are rooted in sense of status, individuality and unique self-expression
- There's white space for brands to better appeal to young and LGBTQ+ consumers' sense of self
 - Graph 40: agreement - "I have trouble finding brands/products that align with my identity," by Self-Expression Target Consumer and by LGBTQ+ identity, 2023
 - Graph 41: agreement - "I have trouble finding brands/products that align with my identity," by generation, 2023
- Brands can provide new opportunities for young and multicultural consumers to explore and express their identity
 - Graph 42: agreement - "I wish I had more ways to express myself" (any agree), by Self-Expression Target Consumer and key demographics, 2023
 - Graph 43: agreement - "I seek out new experiences to better understand my sense of self" (any agree), by Self-Expression Target Consumer and by key demographics, 2023
- Personalized or customizable products are another way brands can offer consumers new avenues of self-expression
 - Graph 44: agreement - "I like when I can personalize or customize products/services to my preferences," by key demographics, 2023
 - Graph 45: agreement - "I like when I can personalize or customize products/services to my preferences," by Self-Expression Target Consumer, 2023

COMPETITIVE STRATEGIES

Launch Activity and Innovation

- Levi's Tailor Shop provides customization for expression-driven consumers
- Johnnie Walker's pop-up installation offers unique brand experience and custom scotch bottle
- TrueCar individualizes the car-buying experience

Marketing and Advertising

- Saks focuses on self-expression and inspiration with Curated Shops
- Schnick's rebrand celebrates men's individuality
- Heineken spot appeals to those who feel more authentically themselves online
- Heineken appeals to those who feel more authentically themselves online

APPENDIX

- Consumer Research Methodology
- Generations
- Abbreviations and Terms

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