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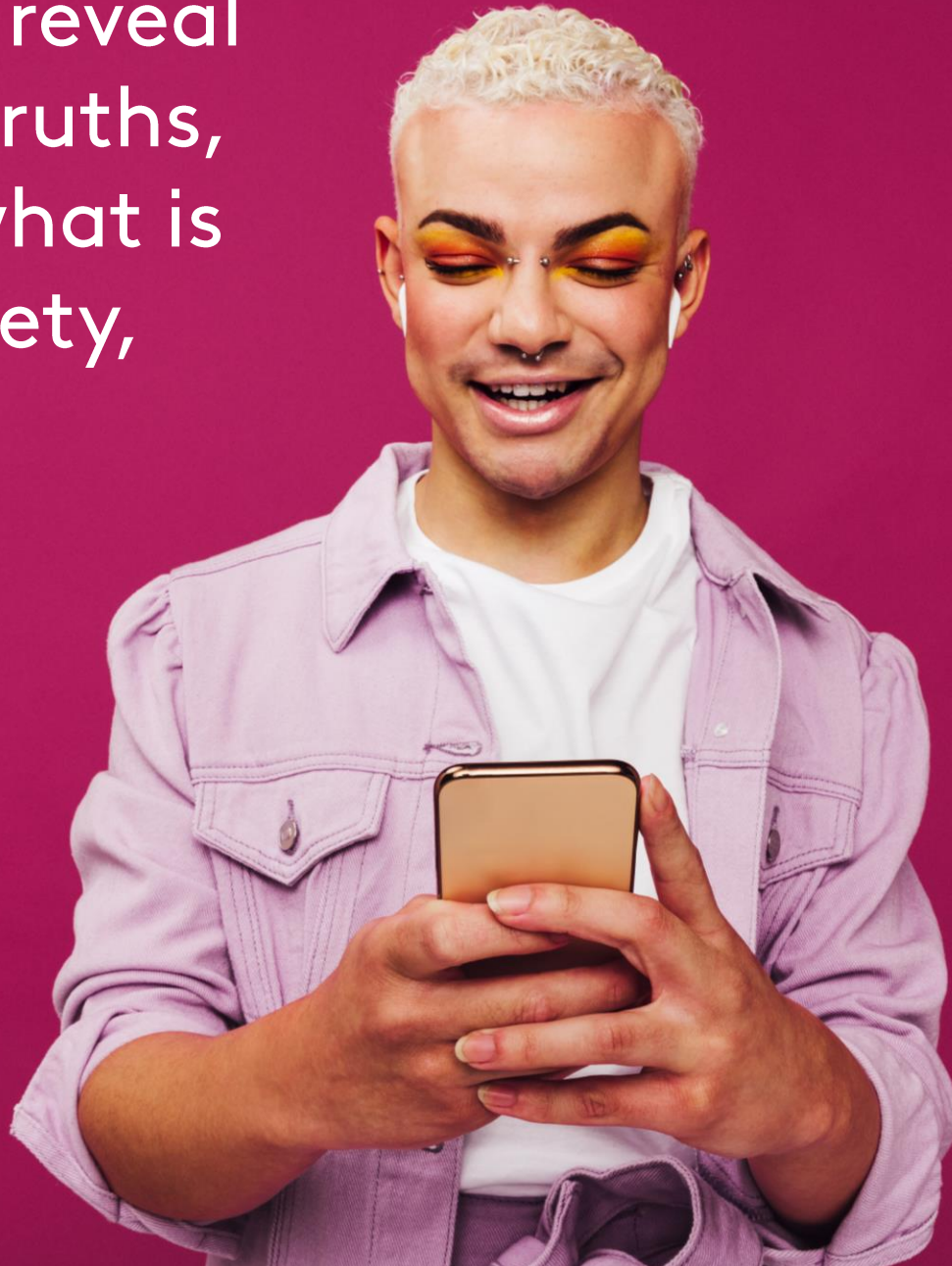
# SWIPE RIGHT

What we can learn about Gen Z and Millennials' mindsets, through new dating trends.





Dating norms reveal deep human truths, illuminating what is valued by society, and why.



That's why our Creative Strategists have deep-dived into dating, using it as a lens into Gen Z and Millennials' values today.

Whether you're in banking or beauty, keep swiping to read the insights and implications that can inspire your brand strategy, from innovation to communications.

We take a **culture-first** approach to Insights, which enables us to identify emergent behaviours that indicate shifting consumer needs and values



**More Women Are Choosing to Be Unmarried. Men Need to Adjust.**



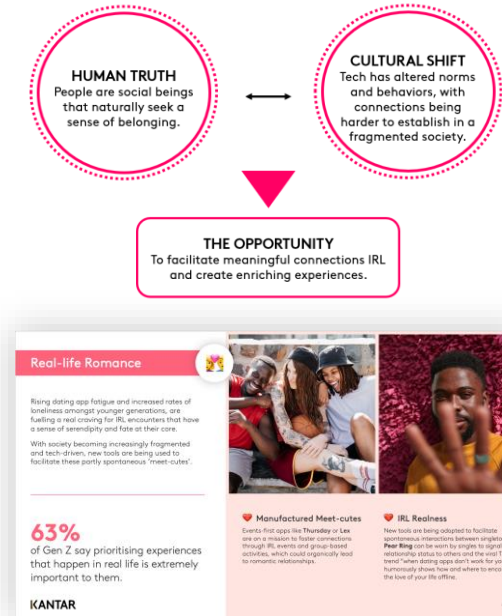
This weekend, I won't be on dating apps...

Sober Dating is Generating over 4.8 Million Views on TikTok

**Culture Combing** to explore the new manifestations and conversations around dating and relationships.



**Macro Drivers Scan** to contextualise emergent dating themes and hypothesise the trajectory of trends.



**Trend Creation**, grounded in consumer tension-thinking and supported by cultural manifestations, brand examples, and Kantar Global Monitor data.



# 4 macro trends are driving new needs, tensions and behaviours amongst Gen Z and Millennial cohorts



## Rising financial anxiety

Young people's anxiety around personal finances is growing, with 47% of young Brits being in a precarious financial position (RSA research, 2022).

Single people are conscious of the cost of dating, too, with 40% claiming they are unable to date as frequently as they used to because of the financial burden (Evening Standard, 2022).



## Increasing rates of loneliness and social isolation

Driven by social disconnection and a decline in traditional community hubs, loneliness is an epidemic on the rise, with young people more susceptible compared to older generations (Forbes, 2023).

Gen Z are 3 times more likely to say they feel lonely than 65-74-year-olds, with 73% of Gen-Z reporting to feel alone sometimes or always (Eden Project Communities, 2022).



## Mental wellbeing and self-care at the top of the agenda

The increased focus on mental wellbeing and self-care continues to be a priority for consumers, becoming increasingly ingrained in more aspects of our daily lives and with an expectation for brands to reflect this.

84% of 13-26-year-olds say prioritising physical and mental wellbeing is extremely or very important to them globally (Kantar Global Monitor, 2023).



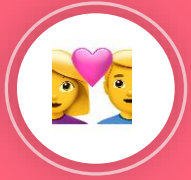
## Human connection redefined

We are becoming increasingly reliant on digital first connections which permeate from home and leisure to work, play and relationships.

Declining in-real-life meets and remote working have fragmented traditional social patterns and movements, too.

61% of 13-26-year-olds say prioritizing relationships with the groups they belong to is extremely or very important for them (Kantar Global Monitor, 2023).

Our **mega trends and manifestations** signal a spectrum in dating behaviours, from reinvention to a radical rejection of relationships norms



## Real-Life Romance

Rising dating app fatigue and increased rates of loneliness amongst younger generations are fuelling a craving for IRL encounters that have serendipity and fate at their core.



MANUFACTURED MEET-CUTES

ANALOGUE ENCOUNTERS



## Couple Goals

Productivity culture meets dating in this trend that sees individuals seeking romantic experiences that won't hinder their self-optimisation, looking for partners based on shared values.



WORKOUT WOONG

CULTURED COURTING



## Detoxified Dating

As younger generations become ever more literate around mental health, they are advocating for dating to be a safer space, where individuals and tech platforms take safeguarding steps to avoid harm.



SOBER DATING

HEALTHY BOUNDARIES



## Hacking the Patriarchy

Upending dominant narratives around Girlboss aspirations, this seemingly anti-feminist trend takes a strategic approach to finding a mate who will financially support their partner's lifestyles, or at the very least, pay for dinner.



DATING UP

STAY AT HOME GIRLFRIEND



## Rejecting Expectations

A counter trend to the dominant cultural narrative that coupling up is everybody's primary goal, single by choice is a growing movement that prioritises self-love, embraces enriching platonic relationship and imagines childfree futures.



CHILDFREE BY CHOICE

INTENTIONAL CELIBACY

## Real-life Romance



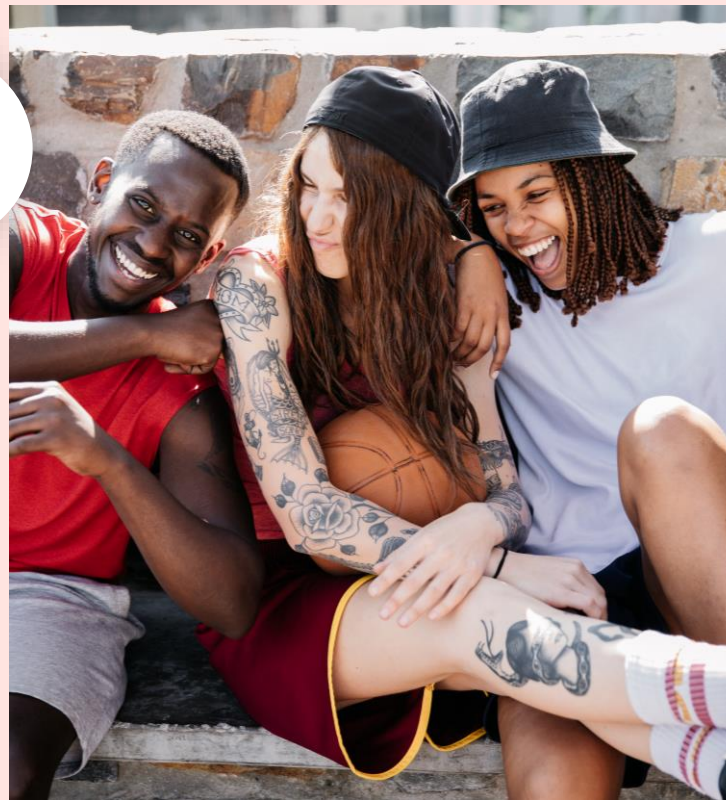
Rising dating app fatigue and increased rates of loneliness amongst younger generations are fuelling a real craving for IRL encounters that have a sense of serendipity and fate at their core.

As society becomes increasingly fragmented and tech-driven, new tools are being used to facilitate these partly spontaneous 'meet-cutes'. While others are taking a more hands-on approach, using wearables to signal their single status.

**63%**  
of Gen Z say prioritising experiences that happen in real life is extremely important to them

Source: Kantar Global Monitor, 2023

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### ♥ Manufactured Meet-cutes

Events-first apps like Lex are on a mission to foster connections through IRL events and group-based activities, which could organically lead to romantic relationships.

Thursday brands itself as the 'offline dating app' and promotes a #betterinperson approach to dating.



### ♥ Analogue Encounters

Wearable Pear Ring is described as 'the largest social experiment ever'. The ring is worn to signal one's relationship status and facilitate spontaneous interactions between singletons.

Tik Tok trend "when dating apps don't work for you" humorously shows how and where to encounter the love of your life offline.



## Couple Goals



Wholesome hangouts have become a fixture of modern dating, with younger generations swapping awkward drinks in overcrowded bars for daytime coffees, park strolls, and picnics.

In this next iteration, productivity culture and value-based dating collide, leading to dates that align with people's goals and values, including holistic wellbeing and cultural enrichment.

# 84%

of Gen Z say prioritising their physical wellbeing extremely or very important

Source: Kantar Global Monitor, 2023

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### ❤️ Workout Wooing

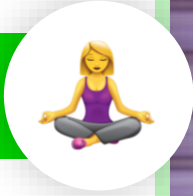
From people hitting the gym on their first date(!) to new dating apps like **Ateam** and **The League** being designed for goal-oriented singles, there's a purposeful approach to finding a partner whose physical goals align.



### ❤️ Cultured Courting

Dates are increasingly becoming a means to explore new things and try out new activities. **#Bookstoredates** are trending on Tik Tok at 430M views, with younger generations favouring more intimate settings and educational activities to the traditional post-work pint for a first date.

# Detoxified Dating



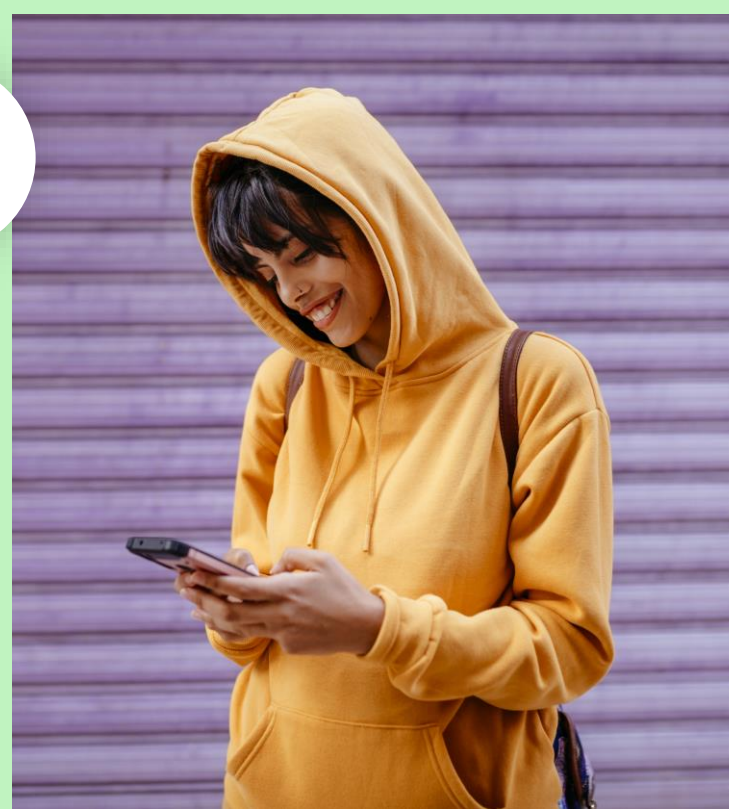
From hookup culture to viral terms to describe toxic behaviours like 'breadcrumbing', 'lovebombing' or 'gaslighting', modern dating culture is being put under scrutiny.

With Gen Z breaking the stigma around mental health and increasingly investing in therapy, this emergent dating trend puts mental wellbeing and self-care first.

## 88%

of singles say they are interested in going on a sober date this year.

Source: Tinder Future of Dating report, 2023



## ❤️ Healthy Boundaries

Boundary setting has been popularised by influencers and dating app providers who are increasingly focused on protecting users from online harassment. Tinder's Love and Care dating wellness guide helps female daters in India identify the red flags of prospective dating partners.

## ❤️ Sober Dating

As youngsters increasingly re-evaluate their relationship with alcohol, alcohol-free dates are on the rise. Dating app Bumble caters to the growing number of sober-curious singletons through its 'sobriety badges', which allow users to signal sobriety and match with likeminded people.



# Hacking the Patriarchy



Persistent gender inequalities have given birth to a new wave of young women who seek to *play* the patriarchy, rather than fight against it.

At face value these dating mindsets may seem anti-feminist, but contextualised against the gender pay-gap, maternity discrimination, and the beauty burden, these philosophies are framed as a financially smart, aspirational choice for some modern women.

## 257 years

to close the global gender pay gap, with women earning 17% less than men on average

Source: Forbes, 2023

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### ❤️ Dating Up

Hypergamy influencers share strategies for meeting and keeping a 'high-value man'. This approach to dating is driven by a desire to build financial security by choosing a partner who can enrich or support their lifestyle; whether that's as a working woman or someone living the 'soft life' of luxury and relaxation.



### ❤️ Stay at Home Girlfriend

An extreme take on lean-out culture, whereby women opt out of the workforce in favour of adopting an aspirational domestic lifestyle as a #StayAtHomeGirlfriend, which involves keeping house, sharing home-made matcha recipes, and indulging in 10-step skincare routines.

# Rejecting Expectations



A counter trend to the dominant cultural narrative that coupling up and starting a family is *the* ultimate adult goal.

Growing movements that prioritise self-love and celibacy and communities that celebrate childfree lifestyles speak to wider shifts, led by younger generations, who are redefining traditional life-path expectations.

## 50%

of women in England and Wales were childfree at 30 years in 2020 – the first generation to do so

Source: ONS, 2020




### ❤️ Childfree by Choice

This trend shifts the narrative from a story of lack (childless) to one of freedom (childfree). As the movement matures, women are more vocal in rejecting the assumption that they should want to procreate, proudly owning their choices, as exemplified by the community and storytelling platform [wearechildfree.com](https://wearechildfree.com).

### ❤️ Intentional Celibacy

The number of younger people choosing not to have sex is on the rise, as people opt for periods of self-imposed celibacy for a variety of reasons; to invest in self-exploration, and self-love, to prioritise platonic relationships or to ensure they enter new relationships for the right reasons.



A young woman with large, curly brown hair and a bright blue fur coat is the central figure. She is smiling and looking upwards while eating a burger. To her right, a man is partially visible, drinking from a cup with a straw. They are sitting at an outdoor table with food containers and fries. The background shows a city street with buildings.

We can help your  
brand unlock new  
opportunities that  
will drive relevance  
amongst younger  
generations.

# So, you're not a dating brand. But what could these trends mean for you?



## Real-Life Romance

How can your brand facilitate IRL encounters (romantic or platonic) that fuel connection and combat loneliness?



Are you designing your consumer journey with IRL interactions and enriching experiences in mind?



What are the new expressions of romance today that go beyond coupledness?



## Couple Goals

Do you understand the new values and goals of your target audience and how they impact socialising choices today?



How can your brand tap into new occasions that fuse socialising and dating with wellness and culture?



How can your spaces be better adapted to encourage organic connections?



## Detoxified Dating

How do you cater to younger generations' holistic wellbeing needs and behaviours through product and experience design?



How is your brand taking steps to improve or solve the category pain points?



Are you fluent in Gen Z language to enable you to authentically communicate with your target?



## Hacking the Patriarchy

Do you understand the concerns and desires of your female consumers and how they are impacting your category?



Are you still championing the busy Girlboss archetype as the ultimate feminine aspiration?



Could you review pricing strategies to reflect the gender pay gap?



## Rejecting Expectations

Is your business future-proofed to succeed in a new world where lifestyles, milestones and ways of living are rapidly evolving?



What are the new life events and rites of passage that matter to young people?



Are you showing a truly diverse portrayal of adulthood and coming of age?



# How we can help you



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## Future-proofing your brand and business

Exploring how macro forces of change will impact younger consumers' behaviour and expectations.

Guiding you on how to future-proof your brand and business by winning with Gen Z and Millennials.



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## Becoming meaningfully different in your category

Identifying emerging cultural shifts and consumer tensions to explore how your brand can play a meaningful role in the lives of young consumers.

Conducting competitor analysis to explore where your brand has the right to play.



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## Unlocking growth by catering to the needs of key Gen Z and Millennial target tribes

Unpacking the key motivations, attitudes, needs and behaviours of specific Gen Z & Millennials target tribes, and identifying how to win with your target audience through comms, activations, NPD, and partnerships.



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## Driving brand relevance through resonant execution

Uncovering the emergent codes and cues that resonate with a Millennial and Gen Z audience through semiotic decoding and cultural analysis.

Providing how to win playbooks for your brand, marketing and creative agency partners.



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## Slide into our DMs...

To find out more or to enquire about a presentation from our experts, please contact one of the team:

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