TOP TRENDS
2025

NOVEMBER 2024

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The Power of Leveraging Trends

In today's rapidly evolving landscape, cultural relevance is no longer optional — it's critical for brands to survive and thrive.

Cultural trends have deeply permeated society, significantly influencing decision-making as individuals make choices based on their values, while social media amplifies these cultural shifts in real time.

64% are more likely to <u>consider</u> a brand that is part of the cultural trends they care about.

63% of people are more likely to <u>buy</u> a product if the brand is part of cultural trends they care about.

50% are willing to <u>pay more</u> if a brand is part of the cultural trends they care about.

almost twice
If a brand is part of cultural trends they care about, people are almost twice as likely to <u>prefer</u> it.

7.5x
Respondents are 7.5x more likely to <u>choose</u> a brand that is aligned with their values.

To maintain a competitive edge, brands must adopt a strong cultural strategy. In an era where authenticity and alignment with people's passions matter more than ever, the stakes are high for brands that fail to adapt.

Source: Finger-on-the-Pulse. N=2300 Aged 18-74, fielded 5/2/2024 - 5/16/2024

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2025 Cultural Blueprint: Navigating a Culture in Flux

As we enter 2025, culture will continue to evolve amidst complex challenges and emerging technologies, demanding adaptability from both individuals and brands. In a landscape shaped by heightened emotional needs, shifting norms, and the convergence of technology and human experience, people will seek deeper connections, personal empowerment, and playful escapism to navigate uncertainty.

In this report, we're introducing eight new trends that highlight key cultural shifts that will define consumer behavior in the year ahead and beyond. These trends touch on critical shifts in key areas: AI and immersive technology are reshaping how we interact and experience the world, mental health awareness is driving emotional resilience, and data and narratives are becoming more flexible as truth bends based on context. Additionally, the disruption of traditional storytelling is being influenced by randomness and decentralization, offering new ways to shape and engage with stories.

We're witnessing a desire for immersive, meaningful experiences that foster connection, challenge routines, and enable people to feel seen and understood. At the same time, playfulness, unpredictability, and creative participation will offer essential outlets for coping with a world in flux.

For brands, aligning with these movements will be crucial to staying relevant, fostering emotional connections, and driving innovation in the year ahead. Brands that adapt to these evolving dynamics will not only meet consumer expectations but actively shape the future of consumer culture itself, leveraging new tools, narratives, and experiences to connect meaningfully.

By examining these evolving trends filtered through our new Culture Q℠ tool, which quantifies key cultural movements, we aim to provide brands with fresh, relevance-building ideas to navigate this ever-changing landscape.

Key Forces Steering Cultural Shifts

We anticipate the topics below will affect people's attitudes and behaviors as we head into 2025. This is the context in which our trends will take place and find form.

01

Tailored Reality

The shift toward hyper-personalization has shaped our culture since the early days of social media. Technological evolutions are increasingly anticipating individual needs, driving deeper connections between people and the products or services they use. AI, wearables, and immersive tech have led us to expect rich, personalized interactions, and for our various technologies to work together to meet our specific needs.

02

Well-being in the Polycrisis

Living in a never-ending polycrisis (polarization, the fall of trust in intuitions, rising geopolitical tensions, economic uncertainty, etc.) has led us to increase our focus on wellness, including mental health, empathy, and interpersonal relationships. This evolution has led to new ways of thinking about support systems, care networks, and emotional resilience, with people seeking deeper, more meaningful connections with one another.

03

Fragmented Futures

The disruption of norms (from the above-mentioned polycrisis) has been marked by unpredictability, decentralization of narratives, and reimagined content formats. This move reflects a rejection of algorithm-driven predictability and linear storytelling, giving rise to more fragmented, dynamic, and participatory forms of media. People are embracing randomness, whether in fashion, entertainment, or social media, reshaping how stories are told and experienced.

What You'll See In This Report

Our robust trend framework helps us understand and identify what we see happening in culture. We define trends as long-term cultural shifts that impact society and identify signals within those trends as fast-moving cultural manifestations.

Below are the eight trends showcased in this report, newly added to our growing library of 60+ macro trends that we continuously monitor. Consider this a snapshot of what will impact 2025.

Second-Life Broadcasting
People and publishers are reimaging older content through online commentary, curation, original productions and reanalysis, extending its lifespan and engagement.

>Intimacy
People are moving beyond traditional family structures, seeking intimacy through platonic partnerships and communal living, creating space for brands to support more diverse forms of connection.

Layered Realities
Inspired by the headphones that let you both listen to your music and hear the ambient noise around you, Layered Realities is about stacking multiple media streams into a seamless experience.

Himpathy
A new wave of empathy toward men's issues and the unique approaches needed to address them are starting to take hold.

Randomization Nation
Bored of "more of the same," people have an increased desire to puncture through the algorithmic lull and regain a sense of intrigue.

Prompt-conomy
The prompt is the product. People are creating an entire economy around monetizing AI prompts on open marketplaces.

Soft-Wear
As wearable tech integrates into our fabrics, it's becoming an invisible extension of our bodies, enhancing our experiences with everything from fitness and wellness to music.

Age of Lore
Entertainment has transformed into an interactive playground where everyday people are no longer just passive viewers but active participants, reshaping the stories we consume.

MEDIA + EXPERIENCES
"I want"

IDENTITY
"I am"

HUMANITY
"We share"

IDEOLOGY
"I believe"

CREATIVITY
"I make"

Culture Q℠

Culture is messy and highly qualitative. Smart brands know that cultural relevance is the key to business success but are challenged by gauging cultural trends with clarity. Horizon's Culture Q℠ aims to cut through the noise and quantify culture to help brands strategically determine which trends they should adopt based on their business objectives. This way, brands can get ahead and actively create culture, rather than simply join in on it.

The Culture Q℠ algorithm measures cultural trends on two dimensions: The **Impact Score** measures the size of a given trend in terms of how many people it's relevant to, while the **Durability Score** gives us a sense of how long a trend will be relevant, allowing us to separate the flashy, fast-culture moments from longer-term cultural movements.
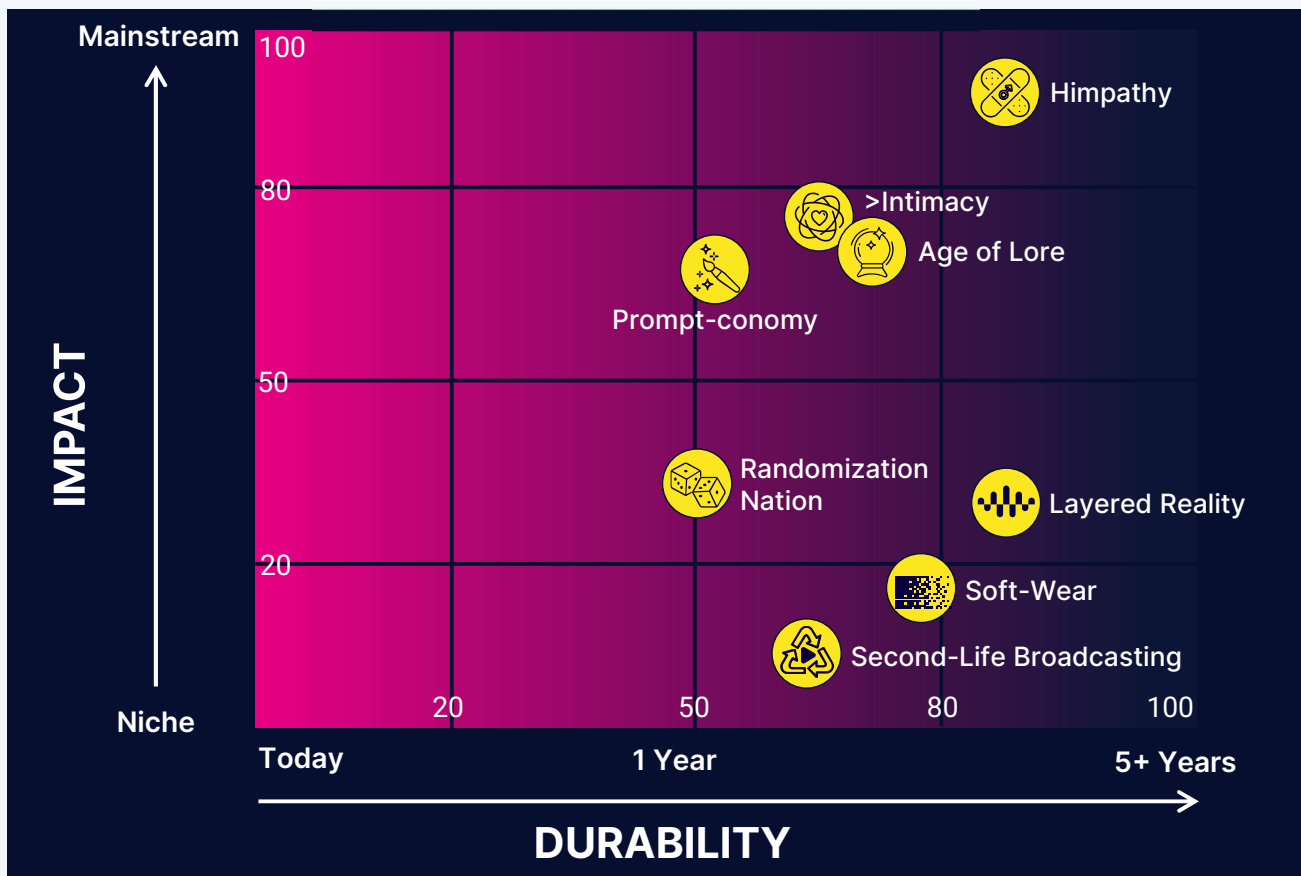
Trends like **Prompt-conomy** are impacting broader audiences but have a shorter-term lifespan in their current state, while others like **Himpathy** are more durable and better suited for longer-term cultural planning across marketing levers.

TOP TRENDS

We're providing a snapshot of key trends that will drive 2025, along with powerful brand ideas to ignite inspiration so brands can be prepared for the year ahead.

To learn more about how to apply any trend to your brand, get in touch with us at **askwhy@horizonmedia.com** for customized application and consulting.

Niche Trends With Long-Term Potential

The trends in this section are impacting smaller audiences that have the capacity to grow, while slow cultural drivers are signaling a potential for long-term endurance.
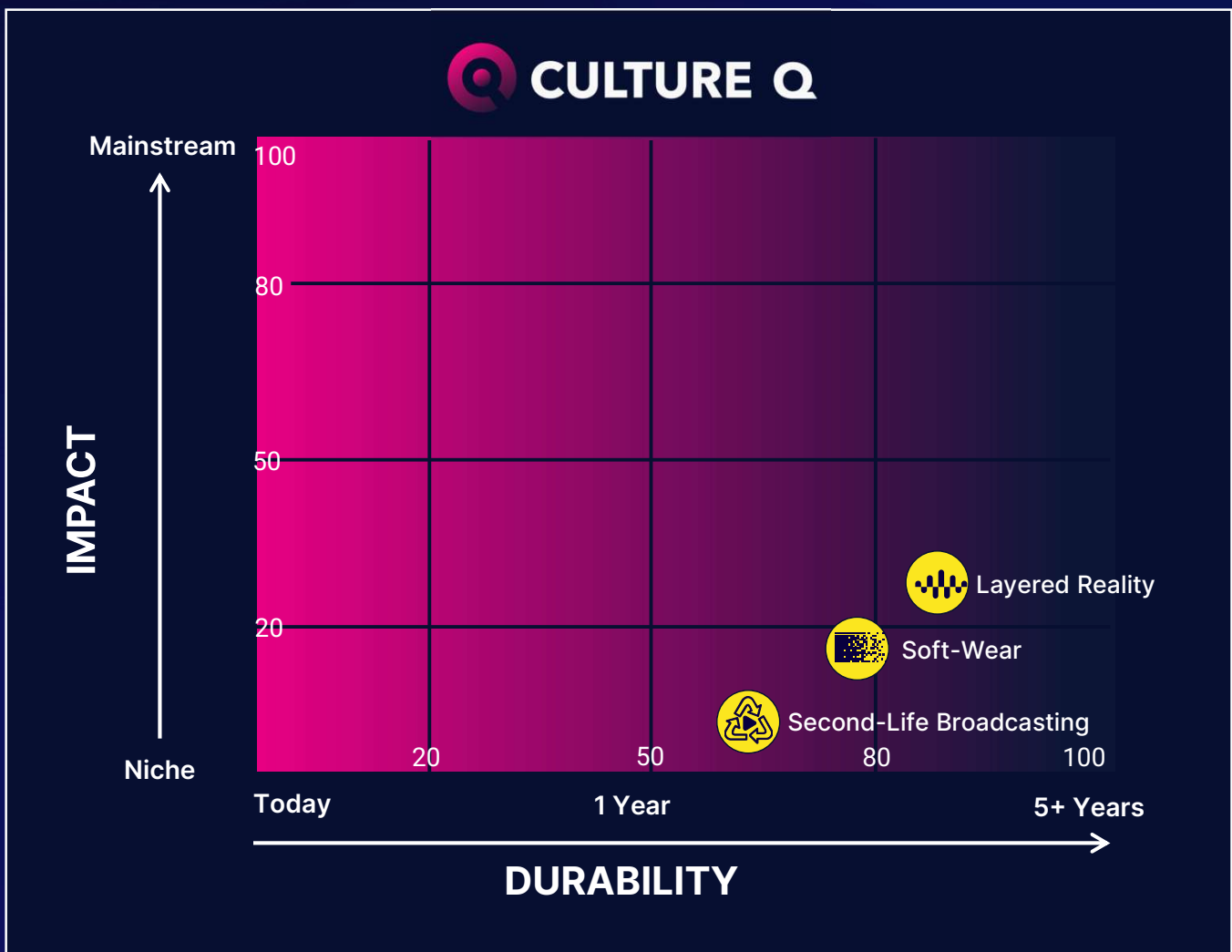
SECOND-LIFE BROADCASTING

People and publishers are reimaging older content through online commentary, curation, original productions and reanalysis, extending its lifespan and engagement across digital platforms by sparking renewed cultural relevance.
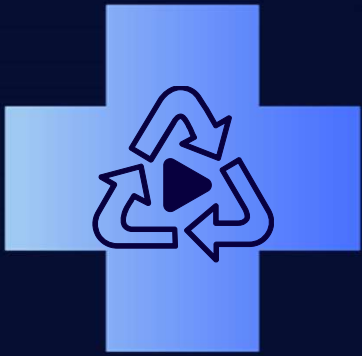
IMPACT: Niche
DURABILITY: 2+ years

The Culture Shift:

As social media transforms entertainment consumption, creators are giving past content a new lease on life by turning TV shows, radio programs, and films into fresh experiences through re-broadcasted videos, podcasts, and livestreams. In a time when nostalgia is less about its origins and more about personal interpretation and timeless access, second-life broadcasting, like Taylor Swift and Beyonce's concerts-turned-feature-films, amplifies earned media by allowing global audiences to engage with local or forgotten programming in novel ways.
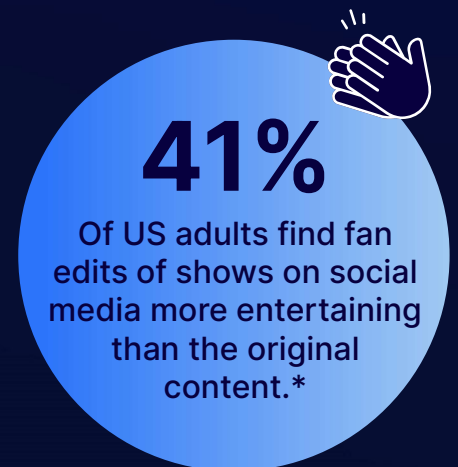
Just as time-shifted viewing through DVRs and streaming changed how we consume media, this shift is redefining the landscape, unlocking new engagement opportunities for brands while keeping conversations alive long after the initial production.

Key Culture Indicators:

- The hashtag #movieclips on TikTok, where people share snippets of movies and shows, has 5 million posts.

- Social media is now a streaming destination. According to Wall Street research company MoffettNathanson, YouTube TV (with over 8MM subscribers) is projected to be the top pay-TV distributer, over brands like Comcast and Charter, by the end of 2026, with over 50% forecasted subscriber growth (Forbes).

How It Will Impact Brands in 2025:

Content upcycling is set to unlock major revenue potential in 2025, allowing brands to extend the lifespan of their media assets and engage audiences in fresh, innovative ways. As this trend continues to gain momentum, companies that embrace it will keep older content relevant, capitalize on earned media, and forge stronger connections with audiences through forward-thinking curation and commentary.

41%

Of US adults find fan edits of shows on social media more entertaining than the original content.*

▲ **52%** 18-49

▲ **52%** Multicultural

▲ **45%** Men
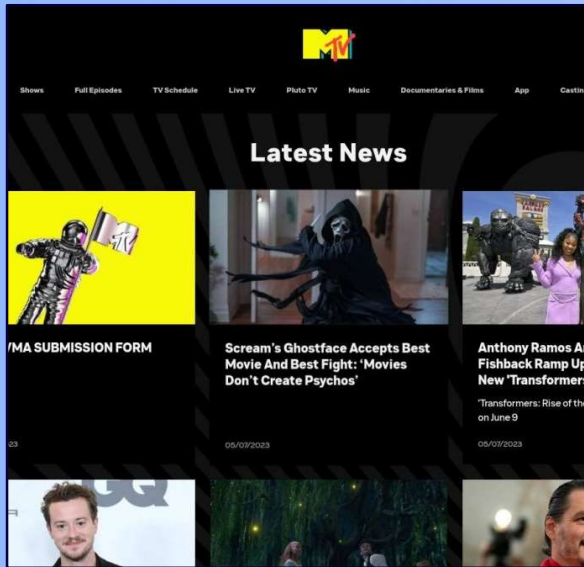
Image Source: Variety via Internet Archive

Archives Revived

Over the summer, MTV News was removed from the internet, erasing over two decades of articles, interviews, and top lists created by their journalists. To preserve this content, the non-profit Internet Archive compiled a searchable index of nearly half a million web pages once hosted on MTV's websites.

Old Shows, New Plot Twists

Remixed broadcasts of past shows are transforming the experience for both new viewers and longtime fans. *Chronologically Lost*, a fan-driven re-edit of the iconic *Lost* series, restructures the non-linear narrative into chronological order. This fresh take allows audiences to engage with the story in a completely new way, illustrating how second-life broadcasting can revive popular content, attract new interest, and spark renewed discussion.

Image Source: Chronologically Lost

Extra-Terrestrial Radio

Social media enables creators to turn local broadcasts into global hits. A creator rebroadcasting the popular NYC KTU morning radio show *War of the Roses* by co-viewing with her audience allows people to access content they normally wouldn't. This approach not only expands the show's reach but also generates additional, unmeasured engagement for the media property and its advertisers.

Image Source: TikTok

SECOND-LIFE BROADCASTING:
BRAND INSPIRATION

ENTERTAINMENT

Synced Show Tunes

An entertainment brand can launch an interactive experience where users can sync any music album with silent versions of their favorite TV shows or series. This allows users to experiment with the tone and mood of iconic scenes by pairing them with different soundtracks. The experience invites creativity and engagement, offering fans the chance to reimagine their favorite shows with new musical scores. These user-generated remixes can then be shared on social media, where others can upvote and interact with their favorite versions.

Extend the Experience to Owned Channels and Live Events:

- Encourage users to create and share their favorite show and album mashups on social media. Feature the most popular remixes on official entertainment brand channels alongside enticing 15 or 30-second video spots to drive tune-in, or even released as special episodes.

- Leverage trending songs on TikTok or partner with musicians with deep fandom communities to create exclusive performances or music videos synced with fan-favorite scenes from iconic shows, blending the worlds of music and film.

LAYERED REALITIES

Inspired by the headphones that let you both listen to your music and hear the ambient noise around you, Layered Realities is about stacking multiple streams of media into a singular, seamless experience.

IMPACT: Niche
DURABILITY: 4+ years

The Culture Shift:

Technology has already turned us into a generation of second-screen natives. Now, tech is going a step further to scale and deliver engaging experiences that seamlessly blend simultaneous realities, media streams and sensations.

Creatively, this kind of layering opens pathways to never-before-seen media experiences that are sure to tantalize and intrigue. Practically speaking, layering realities also has applications that can make real-world experiences more frictionless.

As the world becomes increasingly non-binary and non-linear, and as tech, data and creativity become more entwined, new multi-modal experiences and realities will help brands scale personalization.

Key Culture Indicators:

- <u>84% of Millennials and 94% of Gen Zers</u> are splitting their time between televisions and other devices simultaneously.

- 67% of Millennials and 62% of Gen Zers say they're excited about innovations in media that let them experience two things simultaneously (e.g., music that plays in two different languages at the same time or augmented glasses that translate languages in real-time).*

57%
Of US adults are interested in how technology like smart glasses or haptics can make everyday entertainment more immersive.*

How It Will Impact Brands in 2025:

Strategically layering the right balance of tech, data and creativity will be key to creating seamless, personalized and indispensable brand experiences. These experiences will encode differently in people's memories because they will not just see or hear, they'll *experience* all these things at once in a multi-modal symphony, where the various inputs work together, and the sum is greater than its parts.
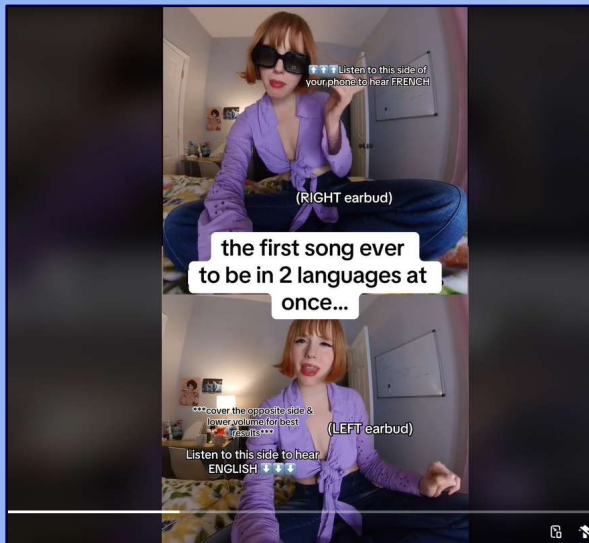
▲ **70%** 18-49
▲ **66%** Multicultural
▲ **65%** Men

Image Source: TikTok

Simultaneous Entertainment

Evolving from the content-response duet format, this TikTok video simultaneously plays the same song in both French and English. The comment section shows an appreciation for the creativity ("This scratches an itch I didn't even know was there," "This made my ADHD so happy!"). This type of content could resonate well with multicultural audiences, speaking to various identities with a single story.

Ray-Ban Meta's Live Translation

Ray-Ban Meta's smart glasses are getting live translation capabilities. This feature will allow wearers to see real-time spoken language translations directly on the lenses, enhancing communication for users across different languages. The new functionality is part of Meta's broader push to integrate AI into everyday wearables, making the glasses more useful in global settings.

Image Source: Wired
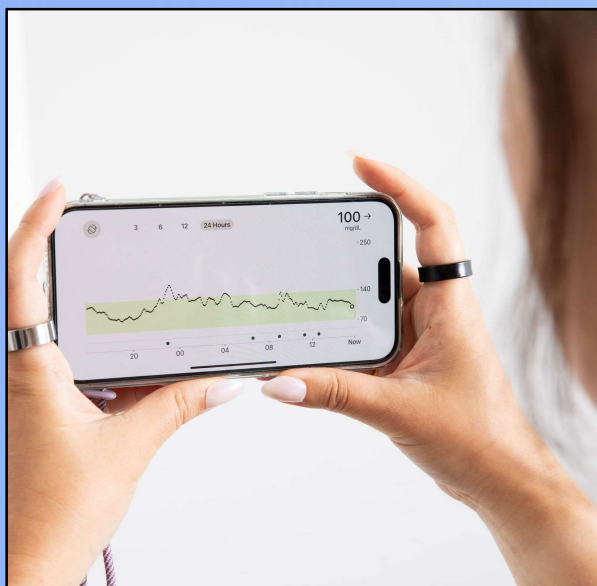
Multimodal UX Provides More Holistic Healthcare

When Dexcom's over-the-counter continuous glucose monitor (CGM) got FDA approval earlier this year, it became easier for health-conscious people or those with Type 2 Diabetes to have access to the health monitoring tools typically reserved for Type 1 diabetics with insulin pumps. The connected app not only reads the CGM device offering information and insight to optimize behaviors, it allows users to share that data with healthcare providers, leading to a more holistic view of their health and habits.

Image Source: The Verge

LAYERED REALITIES:
BRAND INSPIRATION
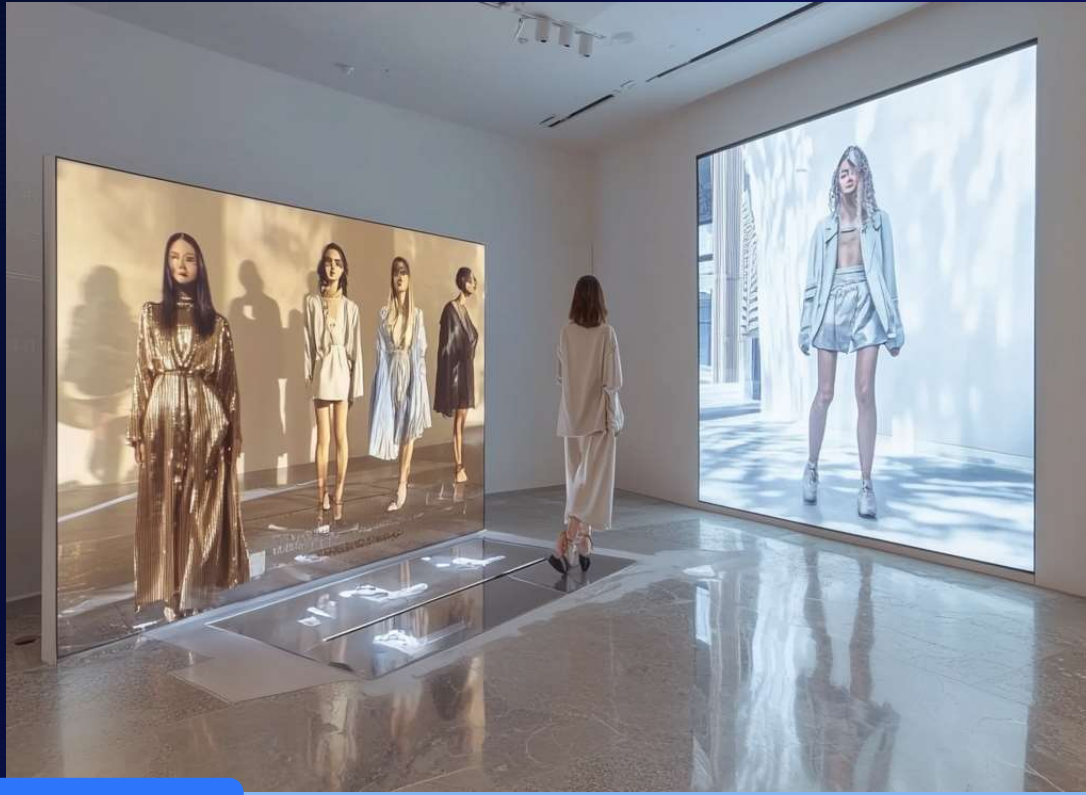
LUXURY FASHION

Dual Dimensions

As a luxury fashion/accessories brand, showcase your collection from multiple perspectives by layering two forms of immersive media — one focused on the designer's vision and the other on the consumer's interpretation. Customers will experience collections through two complementary virtual spaces: a designer-led experience (e.g., 360-degree video of a high-end runway) and a user-generated layer where they style or remix digital garments into their own unique interpretations.

Offer Consumers Ownership

• Host side-by-side virtual lookbooks, one curated by the brand, the other by users.

• Encourage users to post their custom fashion interpretations with #DualDimensions, blending branded assets with personal creativity.

• Set up VR stations in-store where users can explore curated and remixed perspectives simultaneously.
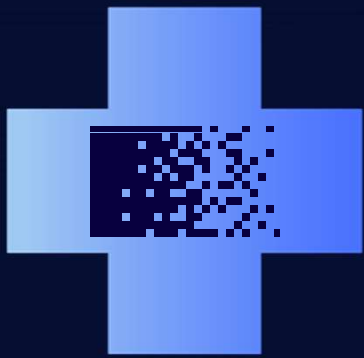
SOFT-WEAR

As wearable tech integrates into fabric and clothing, it's becoming an invisible extension of our bodies, enhancing our experiences with everything from fitness and wellness to music.

IMPACT: Niche
DURABILITY: 3+ years

The Culture Shift:

Wearable tech like the Apple Watch and Fitbit has become everyday gear, but the future lies in smart clothing and conductive fabrics. This market, expected to grow from $2.3B in 2022 to $23B by 2032, is set to transform how we interact with technology. Haptics and sensors embedded in fabrics will add new layers to sports and music experiences, while conductive fabrics optimize wellness, healthcare, and even space exploration.

This shift reflects a broader trend: technology is evolving from flashy gadgets to invisible tools embedded into our everyday lives — eventually becoming extensions of ourselves. Seamlessly integrated "soft-wear" has the potential to create extra-sensory experiences as well as enhance our wellbeing and our lives.

Key Culture Indicators:

- The NFL is using sensors embedded in player equipment and uniforms to help track movements and keep players safe. One measure showed those wearing a Guardian Cap had 46% fewer concussions than players not wearing it.

- The National Institute of Health (NIH) is creating design guidelines for movement-assisted clothing for older adults based on their specific needs and preferences, for example, the loss of muscle mass that comes with aging.

How It Will Impact Brands in 2025:

As people seek more value from their purchases, wearables must do more than one thing. The future of wearables isn't just about what's on us — it's about becoming part of us, blending technology with human experience in a way that brings us closer to the world of fully automated, tech-enhanced living.

1 in 2

Of US adults are interested in clothing or fabrics that integrate technology to improve their health.*

▲ **61%** 18-49
▲ **59%** Multicultural
▲ **55%** Men

*Source: Horizon Media Finger on the Pulse. Survey Fielded 10/16/24 – 10/22/24; n=1,005

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Image Source: Sensoria

AI-Sportswear For Athletic Performance

Sensoria offers a range of smart wearables like socks and upper garments that track real-time metrics like heart rate, cadence, and foot landing to improve athletic performance. The Sensoria Run app, paired with their smart gear, provides AI-powered coaching to help runners enhance form, speed recovery, and reduce injuries. The platform integrates with popular fitness apps and features washable fabrics and seamless tech integration, offering a convenient, data-driven way to achieve fitness goals.

Translate Sounds Into Touch

The SoundShirt by CuteCircuit allows both deaf and hearing users to feel music through haptic feedback. Equipped with 28 micro-actuators, the shirt translates sounds into touch sensations across the body, providing an immersive experience in live events, music, and even video games. It enhances inclusivity by enabling deaf audiences to physically experience music and sounds, transforming how people engage with performances and virtual environments.

Image Source: Soundshirt
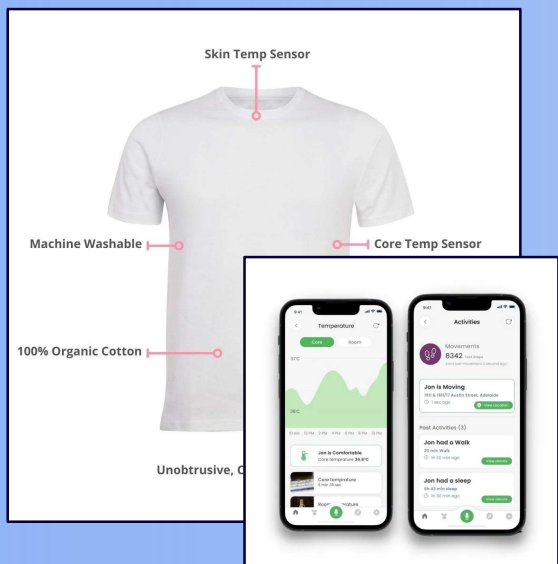
Image Source: Goldilocks

Aging With Dignity And Transparency

Caring for aging loved ones often comes at the busiest time in people's lives, when they're also juggling their careers and raising children, sometimes from far away. Sensor-enabled t-shirts, like the award-winning Goldilocks system, automatically monitor seniors for wandering, falls, lack of movement, lack of sleep, respiration difficulties, and skin and core temperatures. Access to an app provides caregivers and loved ones transparency, and detection of abnormalities in the data can allow for early intervention and prevention.

SOFT-WEAR:
BRAND INSPIRATION

BEAUTY

Feel the Glow

Partner with a smart fabric company to create an interactive beauty experience where makeup, skincare, and beauty products are paired with wearable tech that provides real-time feedback based on the user's skin. The fabric or wearable accessory could monitor skin hydration, temperature, or stress levels and recommend personalized beauty treatments via a connected app.

Showcase Real-time Responsiveness

- Influencers wearing the tech on live streams while testing products can share instant skin feedback with viewers.

- Let users try virtual beauty products with integrated feedback from the tech displayed on their skin via AR filters on Instagram.

- Host in-store activations where customers wear the tech, have their skin analyzed, and receive custom beauty samples.

- Release a mini-documentary following beauty gurus as they integrate the tech into their daily routine, amplifying the campaign across social platforms.

Niche + Emerging Mainstream Trends That Will Likely Evolve

The following trends have demonstrated impact but a shorter shelf life. These trends are ideal for near-term planning.
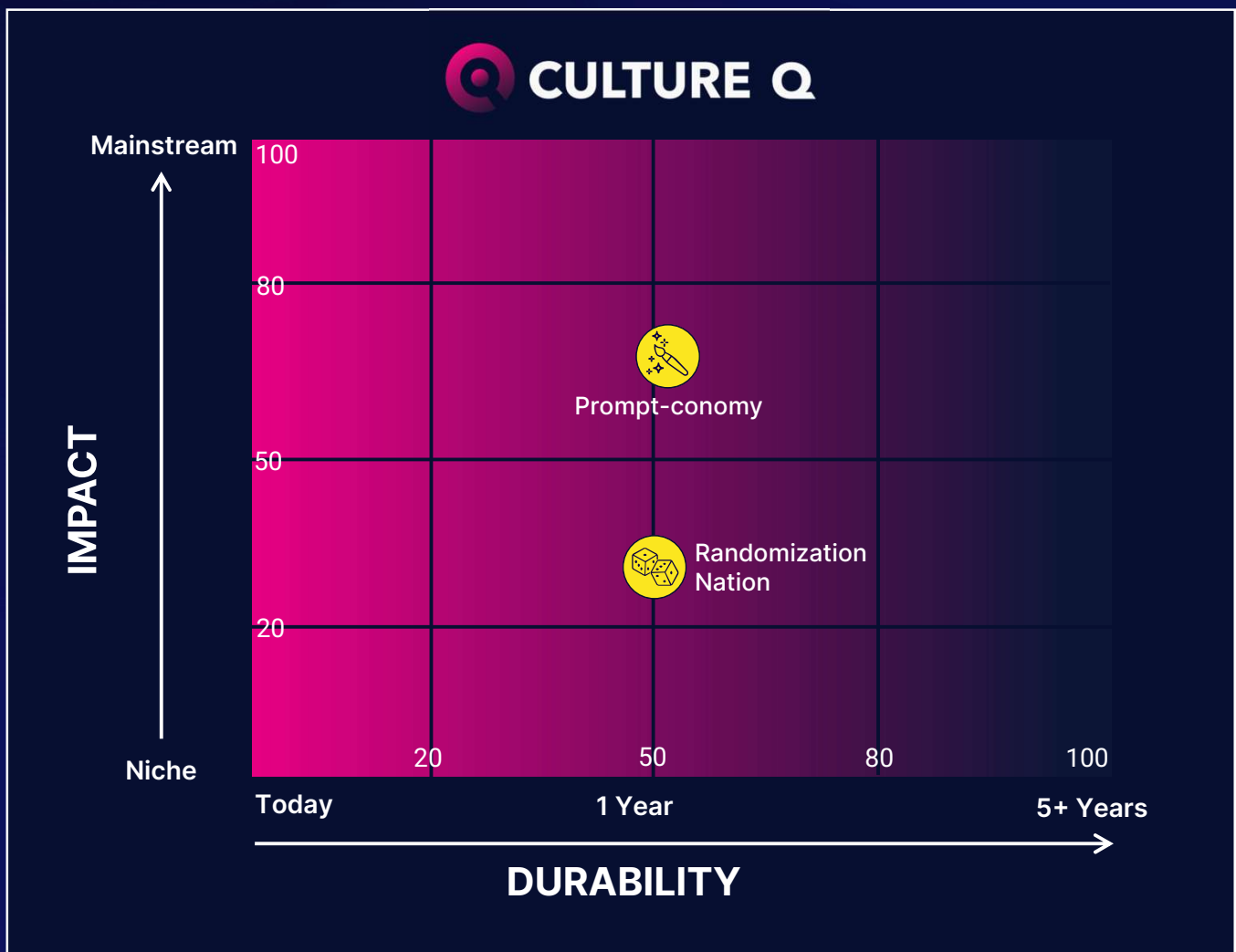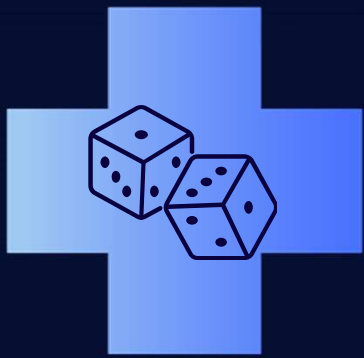
RANDOMIZATION NATION

Bored of "more of the same," people have an increased desire to puncture through the algorithmic lull and regain a sense of intrigue.

IMPACT: Niche
DURABILITY: 1 year

The Culture Shift:

The fashion industry is often a bellwether for broader culture, an avant-garde starting point for shifts in the zeitgeist before they take hold. This year, fashion houses put forth collections that were described as <u>distorted, freaky</u>, and just plain <u>weird</u>. They played with luxe and lowbrow, oversized and skintight, past and present, in what seemed like a wheel of chance.

But this was not by chance. Bored of "more of the same," people are starting to question the concept of algorithms since they are programmed to work one way for everyone. The fashion industry's intentional randomization is a commentary on the desire to puncture through the algorithmic lull and regain a sense of intrigue. The desire for things that turn heads and make you think, ask questions and connect the dots will be mandatory in 2025.

Key Culture Indicators:

"TikTok Algorithm Reset" saw a 52% increase in search interest over the past 6 months and is a rising search term as people seek to give their 'For You Page' a fresh start. A feature introduced in 2023 allows them to do this in the app settings.

@internetraj

One of the joys of X's broken algorithm and out of order timeline is you are periodically gifted anachronistic nuggets of sunshine like this.

How It Will Impact Brands in 2025:

In the coming year, brands will have an opportunity to test their elasticity. Thoughtfully playing with scale, chronology, tone and hierarchy will help brands not just grab attention for attention's sake, but to draw people into a world that is playfully unexpected and highly intriguing.

69%
Of US adults are tired of their social media feeds showing the same content over and over.*

Image Source: Terra

Wander Without Getting Lost

TERRA is a pocket-sized, AI-powered device designed for mindful wandering without reliance on phones. It creates personalized trails using GPS, based on your intentions, time, and location, guiding you through your journey with a simple compass interface and haptic feedback. TERRA promotes exploration while ensuring you always return to your starting point, blending technology and mindfulness. It's open-source, allowing users to build their own device with downloadable software and 3D-printed components.

Randomization As A Rut-Breaker

Wearing the same outfit, doing the same makeup, and eating the same foods day in and day out can start to feel stale and one-dimensional. People are turning to randomized sources of inspiration like #randommakeup filters on TikTok, where beauty influencers let random TikTok filters choose their makeup looks for a creative and playful break from the norm — getting them millions of views in the process.

Image Source: AtarahMayhew on TikTok

Image Source: Modemworks Sample Generator

AI-Enabled Original Creations

The AI Sample Generator, developed by Modem and Bureau Cool for Teenage Engineering, transforms text prompts into custom audio samples using Meta's Audiocraft. Users can input descriptions like "shredding guitar riff" to generate unique samples, which can then be downloaded for music creation. The tool offers two modes — Rookie and Free Fight — depending on user proficiency, allowing musicians to quickly generate, transfer, and sequence audio samples to create brand-new beats rooted in the familiar.

RANDOMIZATION NATION:
BRAND INSPIRATION

BEVERAGES

Sip the Unexpected

Embrace the element of surprise with a campaign that introduces limited-edition, randomly generated beverage flavors. Each drink comes with a mystery flavor, and people can scan the QR code on the back to reveal their unique drink and discover a fun, personalized challenge or activity based on their flavor.

Encourage Discovery Through Engaging Play

- Users can participate in a "random flavor challenge" by scanning their drink's QR code and sharing their reactions via Instagram Reels or TikTok.
- Set up pop-up vending machines where each button press delivers a random flavor and a chance to win branded merchandise or exclusive experiences.
- Partner with influencers for a series of "Random Taste Test" videos, where they try mystery flavors live and encourage their audience to do the same.
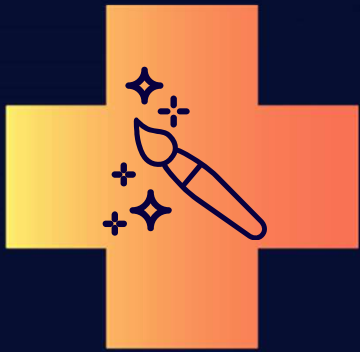
PROMPT-CONOMY

The prompt is the product. People are creating an entire economy around monetizing AI prompts on open marketplaces.

IMPACT: Emerging Mainstream
DURABILITY: 1 year

The Culture Shift:

The threat (and promise!) of AI looms, but there's still a lot to learn in order to harness the full potential of this powerful technology. Those that learn fast are cashing in and creating a mini Prompt-conomy in their wake, where the prompt itself becomes a product.

Strategic imagination is the skillset driving the Prompt-conomy as demand for efficiency, productivity and personalization continues to grow. With access to platforms and marketplaces available to everyone, the lines between creators and consumers will be blurred, and open source will be more valued than gated.

Companies have an opportunity to jump in to create and own prompts related to their brands, create richer stories and invite co-creation with brand fans.

Key Culture Indicators:

- The global prompt engineering market size was valued at $213M in 2023 and is anticipated to grow from $280M in 2024 to $2.15B in 2032.

- The first AI-generated work of art to sell at auction went for $432,500, well above the estimated $7-10k. The same French art collective, Obvious, sold additional works in July for $32k, still above the same $7-10k estimate.

How It Will Impact Brands in 2025:

Tech-enabled creativity will be the currency that drives culture, forces change, and creates value. Brands will continue to put AI center stage as demand for personalization grows. Forget about gatekeeping. Brands will need to think more openly and be flexible about their IP as the prompt becomes as much of a product as the creation.

63%

Of US adults believe prompt engineering will be a valuable skill for creative and business tasks in the near future.*
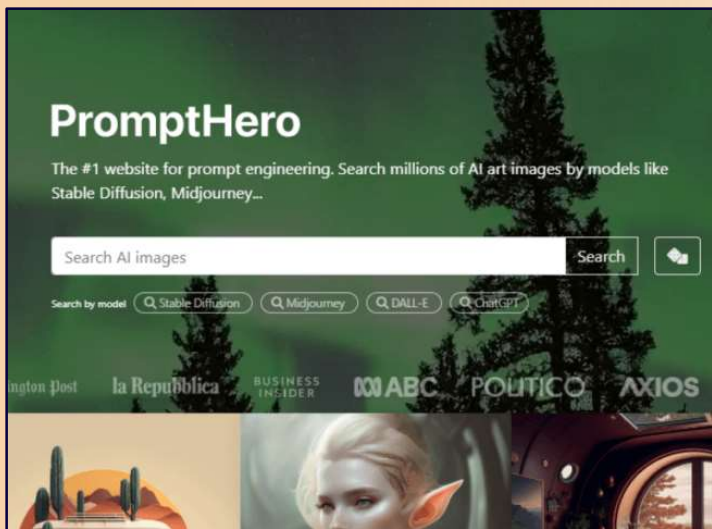
▲ **73%** 35-49

▲ **68%** Multicultural

Image Source: PromptHero

Open Access To Inspiration, Education And Community

PromptHero is a library of AI-generated prompts and artwork that fosters creativity by providing inspiration and tools for prompt engineering, enabling users to explore and improve AI-generated content. The platform also promotes collaboration through its community of AI artists, making it a valuable resource for both beginners and professionals in AI art and prompt design.

The Threat Becomes The Canvas — And The Commodity

The shift among artists from selling art to selling prompts is growing as AI artists find new ways to boost their income with online marketplaces, hosting prompt catalogs for Midjourney, Dall-E, and Stable Diffusion. Etsy even announced that sellers can now sell artwork created from their own prompts or AI tools, provided they disclose the use of these methods in the listing description.

Image Source: Etsy
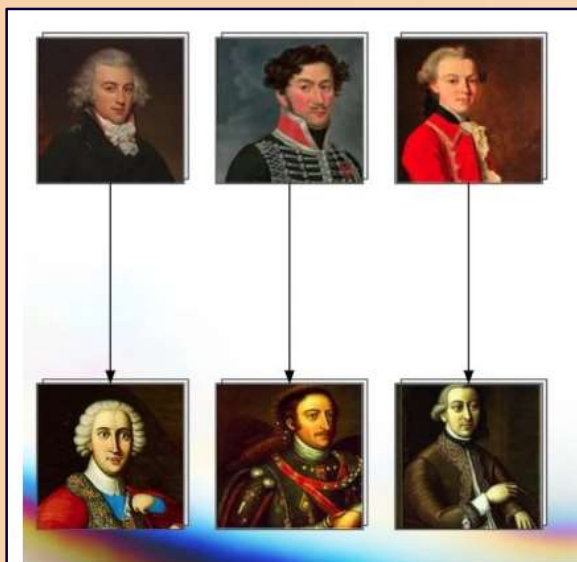
Mind-To-Image Prompts Skip The Text

The French collective Obvious has developed a mind-to-image AI technology that uses fMRI scans to visualize subjects' thoughts, translating them into images. The project aims to capture visualizations directly from the mind, aligning with a "Neo-Surrealism" concept where AI reveals subconscious creativity. While it opens new artistic possibilities, it also raises ethical questions about privacy and the boundaries of personal thoughts.

Image Source: ArtNet

PROMPT-CONOMY:
BRAND INSPIRATION

ENTERTAINMENT

Prompt to Premiere

Invite audiences to submit AI-generated story prompts for original short films, movie stills, or posters. The entertainment brand will use these prompts to create short video clips or imagery, showcasing both the content and the prompt that inspired it on a dedicated website. Users can explore different stories and vote on their favorites, and the most popular prompts will be turned into full-length feature films or series.

Co-Create the Content Pipeline

- Publish the AI-generated videos and images, allowing users to explore the prompts behind each story and vote for their favorites.

- Use platforms like X and Instagram to encourage users to share and rally support for their favorite prompts using #PromptToPremiere.

- Collaborate with film influencers to spotlight the prompt-to-story process, encouraging their followers to participate in the voting and prompt submissions.

Emerging + Mainstream Trends With Long-Term Staying Power

The following trends reflect changes happening across society at large.
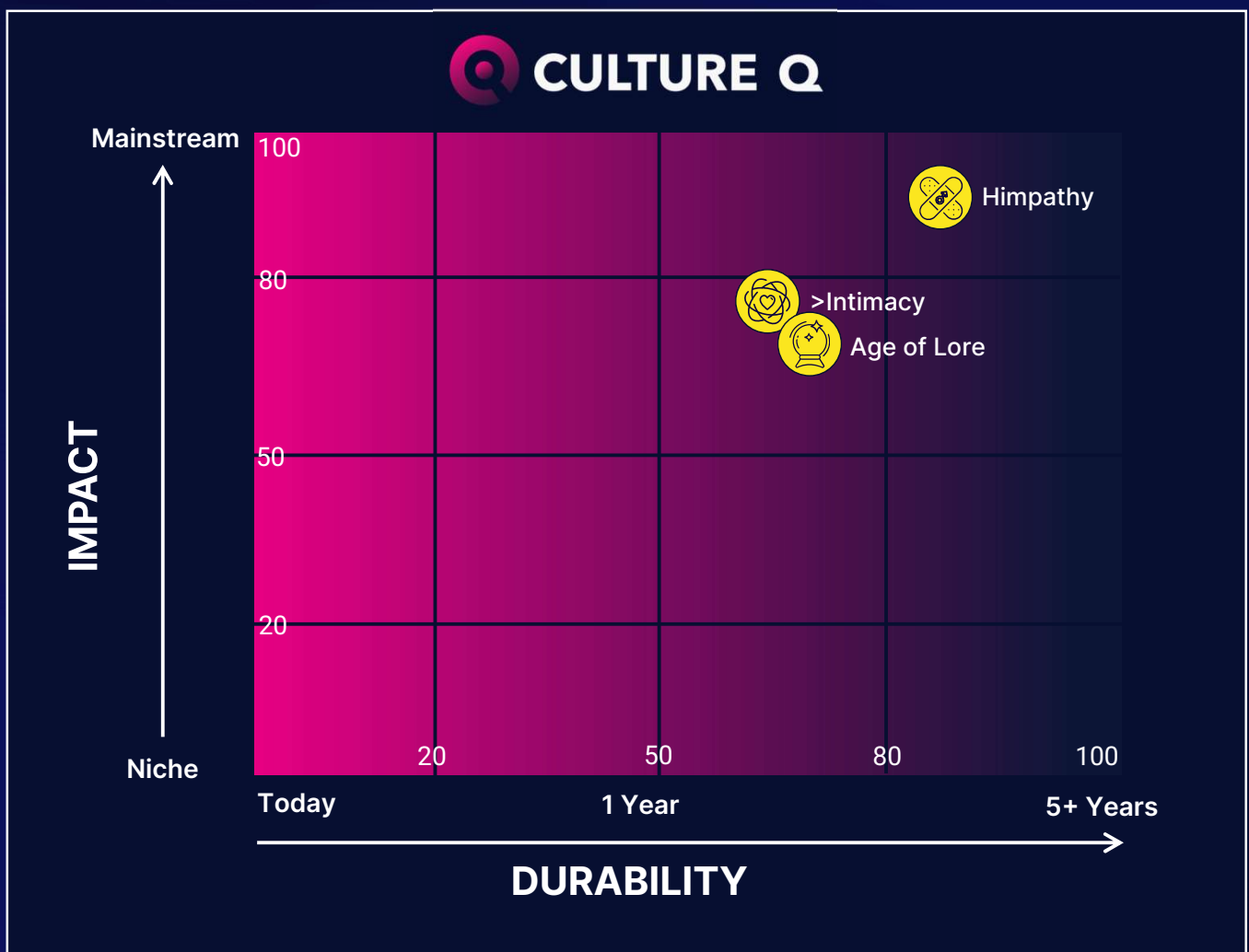
AGE OF LORE

Entertainment has transformed into an interactive playground where everyday people are no longer just passive viewers but active participants, reshaping the stories we consume.

IMPACT: Emerging Mainstream
DURABILITY: 2.5+ years

The Culture Shift:

In the Age of Lore, the boundary between fan and icon, truth and fiction, artistry and speculation is dissolving. Entertainment is no longer just something we watch, it's something we shape. Audiences are now creators, actively participating in the stories that captivate them. As attention becomes the ultimate currency, the spread of lore — myths and fables shared online — redefines culture, turning everyday moments into legendary tales that travel at lightning speed.

With AI complicating the boundaries between what's real and what's digitally manipulated, and growing distrust in mainstream media, narrative control is becoming increasingly decentralized. Everyone has the power to create, manipulate, and spread stories, leading to a collective reimagining of reality that's impossible to lean back from.

Key Culture Indicators:

- Charli XCX's album *Brat* sparked a cultural phenomenon. She cultivates a deep, interactive relationship with her fans by allowing them to shape her persona and artistic narrative, leading many to embrace '**Brat Summer'** and even 'Brat Fall.' With its instantly recognizable lime green branding and playfully confessional lyrics, memes spread from social media to political campaigns. Within a month of its release, *Brat's* virality generated an estimated $22.5MM in media impact value (MIV).

- Podcasts are evolving into video content on social platforms like YouTube where fans are actively shaping the narrative as they engage with stories and speculation via comments. According to a Spring 2024 study by Cumulus Media and Signal Hill Insights, 1 in 3 podcast users now prefer actively watching podcasts with videos vs. other ways of engaging.

How It Will Impact Brands in 2025:

Come 2025, expect traditional brand storytelling to evolve as narrative control shifts from institutions and influencers to everyday communities. Brands must embrace this shift by planting seeds that spark mythology, using their brand codes as a creative canvas to inspire and empower audiences to craft their own lore. This approach will deepen connections, drive cultural relevance, and keep brands agile in a landscape where everyone has the power to shape the narrative.

40%
Of US adults are more excited by the speculation and fan theories surrounding a show than the show itself.*

▲ **54%** 18-49
▲ **52%** Multicultural
▲ **46%** Men

> **jeremy_hecht** 17w
> Here after the battle and this song will continue to age like wine because of all of the references that we still don't even fully understand
>
> 135 likes   Reply

Image Source: Billboard, Instagram

World Of Lore-Craft

To understand the power of lore, look to Taylor Swift, who expertly uses Easter eggs and teasers to fuel fan theories. Similarly, the lyrical feud between Kendrick Lamar and Drake, which evolved from early collaborations into a full-blown rivalry with hidden lyrical jabs ripe for fan decoding, illustrates how fan-driven narratives can blur the lines between artists and their audiences.

Mythical Menu-Making Experiences

In October 2024, McDonald's built a mythology around its new Chicken Big Mac with McDonnell's, a mysterious pop-up in Los Angeles that teased the product and sparked speculation for a one-day event. The reveal, paired with streamer Kai Cenat's livestreaming reactions, turned the launch into a storytelling moment that built buzz and engaged fans around the new menu item.

Image Source: Fast Company via McDonald's

Image Source: YouTube

Commentary As Content

Gone are the days of one-way content streams from publishers to viewers. Now, a vast array of commentary-driven content spans from lighthearted predictions, like Bachelor Fantake's creative sleuthing after each *Bachelor(ette)* episode, to fan-edited reimagined plots, like this creator's video (24MM views) that immortalized the would-be romance between *Love Island* contestants Leah and Rob who never actually became a couple.

AGE OF LORE:
BRAND INSPIRATION

QSR

The Legend of [New Menu Item]

Launch a mysterious new menu item with minimal promotion, leaving the discovery and storytelling to the audience. The only hint: a cryptic visual teaser that utilizes distinct brand assets — think iconic color pairings or pulling a nostalgic logo from the vault — placed in high-traffic urban spaces like subways, on social media, and even on random packaging. Give customers a minimal "brief" and let them create the narrative themselves, sparking speculation and intrigue around the new item. The twist? The new menu item will be based on the most viral fan theories.

Unveil the Lore:

- Release a minimally-branded video on social media with the tagline "It's Coming..." and allow users to guess the new menu item. Encourage them to share wild speculations using the assets (e.g., colors, song tracks, hashtags) and feature the most creative theories as promotional material, driving engagement and excitement.

- Partner with popular storytelling or food podcasts (e.g., *Armchair Expert, The Sporkful*, etc.) to drop subtle, cryptic mentions of "something new" from the QSR. Hosts can encourage listeners to visit a specific location or interact with hidden digital clues, fostering a sense of community-driven discovery.
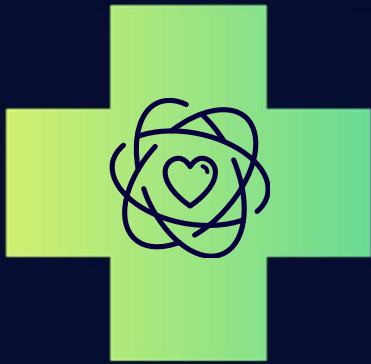
>INTIMACY

People are moving beyond traditional family structures, seeking intimacy through platonic partnerships and communal living, creating space for brands to support more diverse forms of connection and interdependency.

IMPACT: Mainstream
DURABILITY: 2.5+ years

The Culture Shift:

We are undergoing a radical shift in the intimacy economy as people seek more realistic notions of love and support in their day-to-day lives from a wider array of sources. Over 40% of marriages end in divorce. Economic pressures like inflation and rising housing costs are driving over half of 18–24-year-olds to live with their parents. Algorithms are forging intimate communities online among strangers while families are divided over politics. And people are lonely — something's bound to give.

The traditional nuclear family, single partner, dual-income lifestyle strategy is losing relevance and efficacy. People are redefining intimacy and connection, seeking new models that go beyond romantic partnerships, traditional friendships, and immediate family units. Emerging forms of intimacy now include platonic partnerships, multi-generational households, modern communes (for moms, "mommunes"), and friendship matchmaking platforms.

Key Culture Indicators:

- The number of babies born to unmarried women has increased by 2.2x since 1980 (Statista).

- Over half (52%) of adults 18-34 say they trust the online communities they share the same passions with more than their own family members.*

- According to the US Census, the number of multi-generational households rose by nearly 1MM in the past decade.

How It Will Impact Brands in 2025:

As love, connection, and family dynamics shift in 2025 and beyond, brands have an opportunity to adapt by embracing these evolving models of intimacy. Strategies traditionally designed for nuclear households must evolve to also serve communal living, platonic partnerships, and alternative family models. Think of shared subscription services, co-living essentials, and flexible home solutions that cater to a broader range of relationships.

3 in 10

US adults say they've recently entertained the idea of living in a commune.**
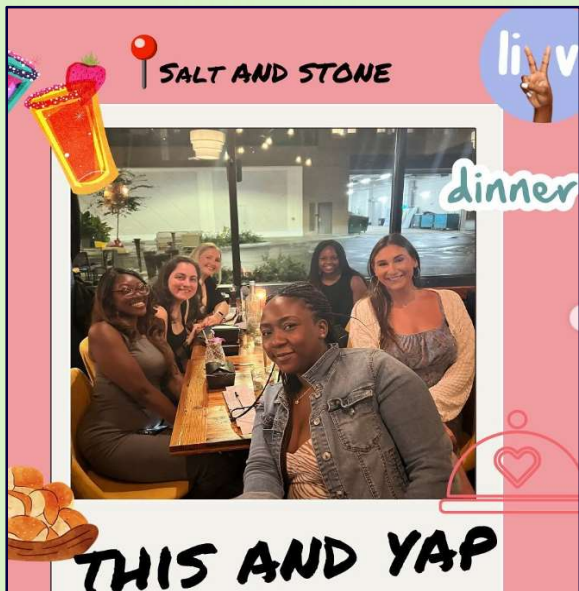
▲ **44%** 18-49

▲ **41%** Multicultural

Image Source: Instagram

Tribe Finders

Apps like Livvi (currently located in the greater Boston area) are revolutionizing how people form close-knit friendship groups, allowing users to build meaningful, intimate connections outside of romantic relationships. Livvi reported over 5.3K friend matches in an Instagram post in August.

The Significance Of Others

In *The Other Significant Others* (Feb 2024), NPR's Rhaina Cohen explores how platonic friendships can serve as life partnerships, challenging societal norms around romance and emphasizing the profound connections that shape our lives. To promote her book, Rhaina cohosted a podcast episode of the *Ezra Klein Show* titled "What Relationships Would You Want if You Believed They Were Possible?"
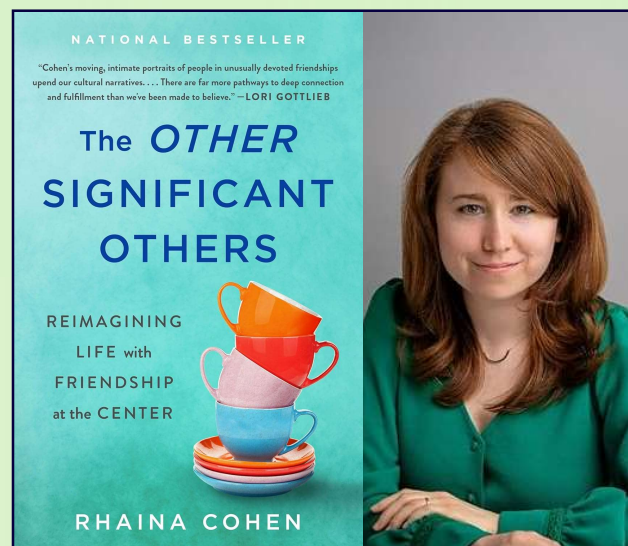
Image Source: Amazon

A Friendship In Transition

Released September 27, Netflix's *Will & Harper* has topped the charts and earned a 99% rating on Rotten Tomatoes. The documentary follows Will Ferrell and Harper Steele, close friends of nearly 30 years, as the two embark on a vulnerable cross-country road trip. With Harper now out as a trans woman, their journey showcases the deep intimacy, support, and self-reflection that friendship provides, challenging typical narratives.

Image Source: Netflix Queue

>INTIMACY:
BRAND INSPIRATION

FINSERV

Banking on *Our* Future

As multi-generational living, platonic partnerships, and shared financial responsibility become more common, position your financial services brand as an ally in managing and navigating these new forms of intimacy. Focus on how financial tools and products can support modern families — whether managing shared expenses, platonic co-investing, or saving for communal goals like co-living arrangements, vacations, or even joint- or poly-retirement.

Share Your Wealth of Knowledge and Resources:

- Launch a suite of co-finance products like shared savings accounts, group investment portfolios, or expense-tracking apps specifically designed for multi-generational families and non-traditional partnerships. Market these tools by focusing messaging on stories of diverse families and friendships navigating financial intimacy together in group-centric media (e.g., billboards near HOV lanes, 30-second ads in prime-time programs, etc.).

- Launch an Instagram campaign encouraging people to share their collaborative finance stories in Reels, tagging the brand and their companions, highlighting how they've successfully co-managed money with friends, family, or roommates. Reels with the most virality win a cash prize to invest in either a group portfolio account or real estate.

HIMPATHY

A new wave of empathy toward men's issues and the unique approaches needed to address them are starting to take hold.

IMPACT: Mainstream
DURABILITY: 4+ years

The Culture Shift:

Partly because men have historically been the power holders in our patriarchal society, and perhaps in part because the more recent #MeToo movement spotlighted how systemic the problematic behaviors of men have been, we have been slow to widely recognize the unique needs of men who are falling further behind in ways that impact us all as a society.

So much about the fight for equality in recent decades has focused on lifting women up. Now, in many cases, women are outpacing men. Men are less likely to have college degrees. Men are more likely to die from "deaths of despair." Adult men are more likely to live at home with their parents. Men lack social and emotional support from friends. All these factors are leading us to a new wave of empathy toward men's issues and creating unique approaches to addressing them.

Key Culture Indicators:

- Men face nearly 4x higher suicide rates according to 2023 data from the American Institute for Boys and Men.

- The proportion of college students who are men is now a record-low 41%, a complete reversal of the situation 50 years ago.

𝕏 @DavidMantarys

I care about women's issues. I expect sane women to care about men's issues in return. That's how functional societies work. Empathy needs to be a two-way street.

How It Will Impact Brands in 2025:

While our focus in recent years has largely been on building equity for and uplifting women and people of color, men have started to fall behind. While some brands have done one-off campaigns, activations in 2025 should focus on a long-term commitment to sparking conversation and building initiatives that address the unique challenges men face, fostering empathy among a broader audience. Engaging in direct dialog, brands can play a role in preventing further marginalization to build a healthier, more balanced society where *everybody* can thrive.

82%
Of American men would engage with a brand that actively supports men's mental health and personal development.*

▲ **86%** 35-49

*Source: Horizon Media Finger on the Pulse. Survey Fielded 10/16/24 – 10/22/24; n=1,005

Image Source: Gilette

Promoting Confidence *And* Caring

Gillette's shift from "The Best A Man Can Get" to "The Best Men Can Be" refocuses the brand on promoting positive male role models and mentorship. The campaign highlights the importance of role models in shaping confident, caring individuals. Through partnerships with organizations like Football Beyond Borders and Major League Soccer, Gillette connects young men and boys with mentors and promotes mental and physical health through relationship building.

Pro Sports Promote Mental Health

The NBA's Mind Health program promotes mental health and wellness across the entire NBA community, including players, coaches, staff, referees, and fans. The initiative aims to humanize mental health by emphasizing that mental well-being is just as important as physical health. Through education, resources, and open conversations, the program helps normalize mental health discussions and offers tools to improve emotional and mental resilience.

Image Source: NBA

Image Source: The Fathering Project

Creating Social Support Systems

Knowing that men are less likely to have supportive social circles, The Fathering Project aims to improve children's lives by equipping fathers and father figures with the tools to engage and connect with their kids. Through evidence-based programs, resources, and community support groups, the organization helps fathers build strong relationships, contributing to healthier families and communities.

HIMPATHY:
BRAND INSPIRATION

AUTO

Drive Together

Launch a campaign promoting men's mental health, emotional well-being, and stronger social connections through car ownership and driving experiences. Focus on the idea that cars are more than a mode of transport — they're a place to reflect, bond, and build connections.

Build the Road to Connection

- Create a documentary video series featuring real men sharing how road trips or car ownership have contributed to meaningful moments in their lives, such as connecting with friends and family or finding personal clarity.

- Collaborate with organizations like Movember to offer resources for men's mental health at car dealerships, road trip events, and online platforms.

- Encourage users to share their "Drive Together" stories of how driving has impacted their relationships or mental health, using the hashtag #DriveTogether, with a chance to win a personalized road trip experience.

Want to dig deeper for your brand?

WHY can help:

Design **bespoke research** and **unpack culture** for your brand.

Map your **brand values to cultural opportunities** with statical rigor via our **Culture Q℠** tool.

Host **custom workshops** to help your team spark culture-forward ideas and inspire new ways of thinking.

Trend Methodology

Identifying Trends:
Our Research Approach

Culture is constantly evolving. To uncover shifts and changing patterns, we exercise three modes of investigation:

OBSERVE + CURATE

- Ongoing monitoring of cultural "signals," or phenomena in culture
- Review public and syndicated data, trades, academic journals, etc.
- Analyze social conversations and content via Netbase Quid

CLUSTER, DECODE + MEASURE

- Analyze cultural signals to identify themes and patterns
- Form hypotheses around why we are seeing what we're seeing
- Name and define our most significant findings
- Measure trends using our Culture Q℠ tool to understand relevance, adoptability, and longevity

VALIDATE + APPLY

- Conduct bi-annual proprietary study via 1,000+ Finger on the Pulse panelists, nationally representative of age, gender, region, ethnicity, and income across the U.S.
- Apply to different brands or industry verticals

THANK YOU

To learn more about how to apply any trend to your brand, get in touch with us at **askwhy@horizonmedia.com** for customized application and consulting.