

Using Consumer Research to Chart Social Trends

By J. Walker Smith & Ann Clurman

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The traditional American Dream is being dusted off by Generation X, which is reinvigorating it with new energy and a new style. Virtually all Xers are taking ownership of this Dream, and in doing so setting the agenda for the American Dream in the twenty-first century.

The American Dream is far from dead, despite what the pundits say, many of whom describe our situation as hopeless. *US News & News World Report* writes despairingly about the attack on the middle class. *Newsweek*, reflecting on growing

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disparities between rich and poor, has announced the ascendancy of a new elite, the so-called overclass. *The New York Times* published a remarkable series on downsizing that terrified most of white collar America, about the insecurity of their jobs and the potential for personal financial disaster.

All of this hand-wringing, say others, is needlessly pessimistic. Consumers, they claim, worry about problems that don’t exist. Michael Elliott and Robert Samuelson, two experienced journalists and students of the American scene, have each set out separate indictments of the American mood, but arrive at the very same conclusion. Our old expectations were just too high. Things today are bad, but not nearly as bad as most Americans think.

Either way—hard times for real or just in our minds—consumers still have hopes and dreams for the future. The important story beyond these bleak headlines often escapes notice. The challenge is tough but consumers have not given up, particularly not Xers [born 1965-present], the generation so often pitied in these accounts. Consumers remain hopeful dreamers. Indeed, there is an aspirational revival afoot, led by this new generation. Marketers must attune themselves to the more relevant question of exactly *what aspirations are now guiding consumer purchasing.*

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diminished prospects, is the focus marketers must take. Consumers still dream, still wish for the things that the marketplace can satisfy, doing so in many different ways.

It is this very diversity in which Xers revel, so the absence of a shared vision does not cause them to conclude that the American Dream is dead. Instead, they are demonstrating that a community of values can be found amid a diversity of styles. They accept the plurality of styles, all of which are united in a common focus on success. Xers will restyle the traditional American Dream with this in mind, becoming in the process a generation to entrepreneurs, and reshaping national aspirations.

Knowing these dreams sharpens your competitive marketing edge. The marketplace is an economy built on dreams. These dreams of consumers have their own vernacular, and signal various badges and connections. They are reaffirmed through daily rituals and celebrations, and achieved through the purchase and use of a variety of products and services. These dreams are the aspirations that open up opportunities for savvy marketer, and generation is a big part of understanding these aspirations.

Aspirations

The American Dream is not just about what you buy; it’s more about how you earn it. In a MONITOR-based study on the new American Dream done in collaboration with TBWA Chiat/Day, 90% of every generation agreed that the “opportunity to go as far as talents and ambitions will take you,” defined the Dream, while only 55% thought the American Dream is expressed “just by the ways [people] spend and save their money.”

This attitude does differ by generation. Matures [born 1909-1945], as we would expect, more often tie the American Dream to how people spend and save their money—63%, compared with 49% of Xers and 54% of Boomers [born 1946-1964]. Similarly, half of all Matures say the Dream is more about “the things I have than the ways I live my life.” The generational need to signal conformity underlies this. The aspirations of Matures were a very basic *economic materialism* that is still expressed today. But while still connecting to the Dream, Matures now see themselves on the home stretch and want the leisure they feel they’ve earned.

Boomers grew up taking material success for granted, so their aspirations for personal fulfillment have been different. Boomers never strongly connected with the traditional American Dream because of this. The Dream skipped a generation. Boomers have not wanted tangible goods any less than Matures but the American Dream has not been the centerpiece of their goals and ambitions. Their aspirations were tied more to a *fulfillment materialism* with which they continue to struggle. Early retirement is an idea that captures much of what Boomers feel—financial freedom from things that tie them down and a relaxed chance to complete their search for self.

Xers have taken up the Dream and reinvigorated it as a force that defines buying motivations in the marketplace. Partly, of course, this is because more Matures and Boomers feel they’ve already achieved the Dream—64% of Matures and 34% of Boomers, versus only 14% of Xers. Xers are looking forward to getting started on the American Dream. they sound serious, and they are, with aspirations that reflect a *competitive materialism*. But they pursue personalized visions of this; they do not hew to a common Dream....

Talking To My Generation

Consumers look forward to the future again. Since the nadir of hope in the early nineties, our MONITOR tracking has shown a steady, year-to-year revival. Fewer consumers now feel that they will be forced to accept limits in the future, a trend reflecting an ongoing rejection of the paralyzing aspirational pessimism that prevailed for a brief time. But it is a qualified optimism. Today’s dreams fit a more limited set of expectations. An understanding of the emotional side of these more moderate yearnings will enable brands to successfully connect with the ways each generation is looking towards the future. Brands should recognize this and refrain from asking buyers to overreach their means. People still want to create better lives for themselves and their children, but their dreams now reflect a more sober temperance about what they are willing and able to do to get there.

This is most pronounced among Boomers—they reached far and failed to grasp the brass ring, creating a visceral despair that gave rise to an ugly period of denial and victimization. Boomers recovered by retreating to moderate ambitions. Sympathize with this struggle, but don’t pander to it. Boomers want reinforcement, so make your brands part of their smart new approach to success. Remember too that Boomers still carry many obligations—mortgage, college, parents, retirement. Perhaps even more than moral support, Boomers need real help with these commitments. They’d love a panacea, but they’ve given up that sort of wishful thinking.

Xers see limits as givens, a part of life that must be faced, but not something that will constrain their potential. Their expectations and lifestyles account for these restrictions, so, unlike Boomers, the impact of these limits does not represent some sort of loss. Also, they believe they can succeed through their own entrepreneurial efforts. Xers need help, feedback, resources, training, and empowerment. Brands should offer remedies and encouragement.

But it’s more than this. In their aspirations, GenXers seek to be in command—forging a future on their own terms. Over the next decade, as Boomers look for escape and relief, Xers will step in to lead the way in defining our vision of success. They will remake the traditional American Dream according to their pioneering spirit and *reshape the market from one in which entrepreneurs are respected into one in which everybody is an entrepreneur*.

Matures feel the closest connection with tradition. A modest future is not a threat

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to most of them, unless it’s so modest that it’s meager. They fear impoverishment if times get too hard. They want a safety net against unexpected problems or shortfalls in their own plans and savings. Brands should give them both insurance and reassurance.

Success American Style

Freedom to choose how we live. Happiness. A good marriage. Unlimited opportunities to pursue dreams. Living in a decent, secure community. These are not

Social Trends

the kinds of things you can buy. Rather, they come from the sense of well-being that flows from lives that are under control and on track. These are fast becoming the new symbols of status and prestige.

Through MONITOR we have maintained an ongoing ranking of those things consumers most associate with success and accomplishment. For years, traveling for pleasure topped the list, an experience tied to materialism. Indeed, material things came first.

Today tangible luxuries like high-end cars and designer jewelry no longer enjoy this cachet. They are no longer the most exclusive things to have. People see them everywhere, and as a result no longer view them as symbols of privilege and prosperity. Additionally, many consumers who finally have acquired these possessions soon take them for granted. And in their search for novelty, they look around for other things to covet.

Today it's the intangibles that are scarce. These are the rarities in life. The people who have these things are the more accomplished among us. A good marriage is harder to find than a designer outfit. We know more Mercedes owners than happy people. Big houses stare back at us block after block down any suburban street, but we almost never see a pleasant, smiling face stare back at us on the subway.

Our most recent MONITOR research shows the top four determinants of success and accomplishment as: being satisfied, being in control, having the respect of other people, and having a good marriage. This is a big turnaround from fifteen years ago. It's the intangibles that consumers want to accumulate nowadays.

Expensive cars, luxury hotels, travel, gold credit cards, investment portfolios, prestige stores, and high technology no longer connote status. This is not to say that consumers no longer want these things. It's just that they are no longer most associated with accomplishment.

Young people have always been more focused on tangibles, and that remains true today. However, in a big change from the historical pattern, even among Xers the status of luxury items has dropped. Xers want them, of course, but they don't signify premier status. A Lexus is a good car, but just wheels. A Seiko looks good, but it just keeps time. Air Nikes wear well, but they walk the same pavement as a pair of K-Swiss. Xer achievers will, like all consumers, find status in other things.

All this indicates a shift from what

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looks good to what feels good. From what others think to what I think. Consistent with an emerging reliance on the self and a distrust of external sources of information, consumers see their own opinions as the ones that matter. No explanations, no apologies, no shame. An entrepreneur's sense of what's best.

When status is driven by whatever I say it is, it could just as easily be tangibles that I choose. So certain tangibles are making a comeback, particularly indulgences like cigars and martinis and the Wonderbra. Tangibles can still be signs of status, and some are now coming back. Outside of these few, though, tangibles have been displaced.

What can be worn on the sleeve nowadays, in a time when “sublime status” has replaced “show-off status,” is

expertise. Money can't buy being in the know. But smarts offer the proof intangibles can't provide that you're on the cutting edge.

For many years, we have tracked the things that people say are “really important.” In the ten years from 1985 to 1995, all tangibles went down—designer names, credit cards, cars. First-hand knowledge went up—knowing the “in” places to eat, being aware of the latest exercise trends, being recognized as someone “in the know.” Having the inside scoop and being best informed are the new ways to grandstand in a time when grand possessions no longer stand out. Which is why bumper stickers now carry this message: “Too bad ignorance isn't painful.”...

Post-Friedan

Betty Friedan, a Mature, threw down the gauntlet in 1963 with the publication of her landmark book, *The Feminine Mystique*. In her analysis of circumscribed roles for women in American society, she wrote of “a strange stirring, a sense of dissatisfaction, a yearning that women suffered in the middle of the twentieth century in the United States. Each suburban housewife struggled with it alone,” quietly wondering, “is this all[?]” What troubled Friedan most was that while the older women with whom she spoke could recall giving up personal hopes and dreams to accomplish what was expected of them, many younger women she interviewed “no longer even thought about them. A thousand expert voices applauded their femininity, their adjustment, their new maturity. All they had to do was to devote their lives from earliest girlhood to finding a husband and bearing children...[I]n the fifteen years after World War II this mystique of feminine fulfillment became the cherished and self-perpetuating core of contemporary American culture.” Many women heard Friedan's clarion call to move beyond this definition of womanhood, but it was Boomer women who really answered her by striking out on a new path, one that led them into the workforce.

The acceptance of women in the workplace is the single biggest shift in American social values since the end of World War II. Twenty or more years ago it was Boomers who most readily accepted women in the workforce, and they passed this value on to their children. Therefore, Xer women have entered the workforce amid the strongest-ever acceptance of this value.

Women became independent operators in the marketplace, and undermined the long-standing marketing assumption that women aspired chiefly to building a family. This notion showed up even in commercials for personal products like cosmetics. With new views

political groups. More and more they began to link their physical health to their emotional well-being, recognizing that looking good was not only about hair and makeup, but also about feeling good.

While not all women agreed on every issue, the differences of opinion we measured were largely confined to the more extreme tenets of the women's movement. But even as early as 1974, all women were, in the words of Dan Yankelovich from his book, *The New Morality*, "solidly behind equal pay for equal work, prepared to believe that it is as important for a 'real man' to be concerned about the sexual satisfaction of

Post-Freedom

Today's headlines make much of women rethinking the role of work in their lives. But as early as 1979, Monitor detected the first murmurings of discontent. Even before their next big push into the workplace—over 50% of all women were already working by 1980—many women who embraced these new freedoms in the early seventies questioned them less than a decade later. While few women wanted to relinquish the psychological and financial rewards of work, we saw signs that the sense of self-worth provided by work was decreasing. Women expressed more reasonable expectations about their jobs, having seen firsthand some of the trade-offs required. The thrills of work had started to dull, the everyday stress and routine had taken some of the bloom off the rose.

While the appeal of work diminished, the impact on femininity became increasingly disconcerting to many women. Women did not bemoan the demise of the feminine mystique and its one-dimensional emphasis on marriage and motherhood, but they did regret certain losses. Early on, many women had attempted to minimize the emotional and physical differences between themselves and men. By the mid-seventies, a growing chorus of authors was warning against looking too feminine at work—it distracted men and it kept women from being taken seriously, they said. Attempting sameness, many women decided they had to act and look tough. They donned suits, white blouses, scarves, bow ties, dark hose, and pumps.

As women entered graduate and professional schools in greater numbers and filled middle management ranks in many fields, they gained a self-confidence that gave them a new freedom—the freedom to reintroduce femininity into their look and style without paying a price. At first they wore frilly underclothes beneath their power suits, but soon the suits themselves became a memory. Women realized that they did not have to be the same to be equal. They could be different and equal too.

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about femininity, many married women kept their maiden names or opted for hyphenated versions. Others took off their wedding rings. Still others stopped wearing makeup. Unisex fashions flourished, as did access to traditionally male-only institutions. Military academies finally admitted them, and banks for women found a market niche.

With great eagerness, in the belief that their time had finally come, many women went to work thinking that almost any job was better than staying at home. Other women who opted to stay home, or who had no options at all, were affected by this, too. They became more forthright and experimental, looking for fulfillment and personal creativity in ways unconnected with homemaking.

Women began to reexamine their roles, turning introspective. They read self-help books, evaluated their psychic needs, participated in consciousness-raising sessions, and formed their own

his partner as it is for him to be a good provider and 'family man,' [and] no longer committed to the idea that the man must be the main decision-maker in the family.”

By the end of the seventies, work for women, just as much as for men, emerged as the primary vehicle for self-expression and self-fulfillment. The eighties saw working women throwing themselves into their jobs just as much as working men. They had emancipated themselves from the societal expectations Betty Friedan excoriated. Of course, not all women welcomed this. But even the so-called total woman, by rejecting it, was exercising the freedom to make her own decisions, independent of societal pressures to conform, that constituted the fundamental development of this era. It was, as Florence Skelly used to say, the ability to choose without penalties.

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In the midst of all this, Revlon looked to MONITOR in an effort to keep young women interested in their best-selling fragrance Charlie. When introduced, Charlie ads had captured the mood and temperament of young, independent, "with-it" women. With the revival of femininity, Revlon realized that it had to consider softening the image of Charlie without undermining the independent point of view it celebrated. So the pantsuit-clad model swapped her signature look for a dress.

By the mid-eighties, women were under pressure. With freedom had come isolation. Economic pressures, relationships, divorce jarred them. Self-fulfillment seemed more elusive than ever before. One enterprising soul started selling T-shirts that read, "Oh my God, I forgot to have children!"

Redbook popularized this image with an ad campaign about the "Juggler," the new woman who did it all. She had mastered how to shop, how to manage her time and her money, how to raise kids, how to be competitive at work, indeed, how to win at all costs. And, of course, she read *Redbook*.

Unfortunately it didn't quite work this way. Frustration, disappointment, and stress were often the only fruits of her labors. As the atmosphere of the eighties collapsed into a mood of denial and victimization, women had their own specific complaints and heartaches. Little wonder that Calvin Klein, who brought out *Obsession* in the eighties, offered her *Escape* in the early nineties.

Finding Her Way Out

None of these misgivings and frustrations undermined the confidence women felt. Rather, their concerns were about the price they had to pay to exercise their talents. They weren't trying to abandon careers, *only balance them*.

In partnership with *McCall's*, we completed a MONITOR-based survey in 1993 of adult women titled "The New Female Confidence Report." And con-

fidence was what it showed. Three-quarters of women in every generation saw themselves in control, knowing what they wanted most out of life. Nearly all women surveyed, Boomer women in particular, saw themselves as willing "to fight hard for the things" they believed in, and nearly as many said that "a single woman can lead a full life." There was little they felt they "couldn't handle on their own."

But this research also uncovered signs of disquietude. Far fewer than half the Boomer women surveyed described themselves as happier or luckier than

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their mothers at the same age. Even more striking, 43% of Xer women saw themselves as more conflicted about choices than their mothers. Seventy-six percent of all women believe that "life today has become much too complicated," versus 62% a little over a decade ago.

We looked into this in more detail for a cover story in *Fortune* that appeared in September 1995, concerning the midcareer crises of Boomer women and their approaches to handling them. The willingness to make changes to fix whatever they felt wasn't working was well summarized by one woman interviewed for the article: "The message of the day is that change is possible. You don't have to get it right the first time." The article concluded that women would go forward, but in some very new ways: "[T]hese mid-life crises are ultimately not about retreat but about redefinition.

In great numbers, women executives emerge from this period making decisive mid-course corrections."

These women are in the vanguard of what's happening in the marketplace as a whole. Consumers have wearied of being dominated by work. So consumers are striking a new balance, and women, Boomer women in particular, having most intensely felt the demands of the workplace over the last few decades, are leading the way.

In this research for *Fortune*, all but 13% of the women we interviewed said they had made or were seriously considering major changes in their lives: 45% cited starting their own business; 44% cited changing jobs in the same field; 38% cited going back to school; 37 percent, taking a sabbatical; 35%, changing careers; 33%, making a major personal change; and 31%, leaving their jobs and not working.

Most women we have interviewed in our MONITOR tracking, career and noncareer women alike, have discovered that less is actually more. As women took on more and more in the seventies and eighties, they increasingly saw diminishing returns. In their search for balance, many women have tossed out some of their juggling balls for the few that genuinely matter.

Women feel freer to construct the kinds of lives they want, but they don't want to do it all. Marketers trying to reach out to women, particularly Boomer women, should note: They need fewer reminders of their complex lives and more kudos for their know-how and accomplishments. Fewer portraits of the juggler and more laurels for her talents.



J. Walker Smith is managing partner at Yankelovich Partners, Inc. He oversees The Yankelovich MONITOR. Ann Clurman is a Yankelovich partner with more than twenty years of experience with the MONITOR.