

2004: THE CONSUMER CONTEXT

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"Brands," writes *The Times* of London, are "a complex modern language that is understood all over the world." This link between the spread of globalization and the growing importance of brands helps to explain the intensification of interest not only in brands but also in "brands beyond brands."

In an article in the *Harvard Business Review*, Douglas B. Holt writes about those "beyond brands," such as Harley-Davidson and Mountain Dew, which have become cultural icons. Holt claims that such iconic brands "forge a deep connection with the culture" by tapping into "veins of intense anxieties and desires running through society."

The phrase "intense anxieties and desires" seems particularly apt as a description of what people are feeling at the beginning of 2004. This year's "Consumer Context," therefore, will explore the anxieties and desires consumers are experiencing and then suggest the cultural connections brands can make to these veins of emotion.

It will focus on three new trends:

- Reinvention
- Empowering the Individual
- The New Community

It will also examine the continuing power of trends such as Design for Everyone, Pursuing the Spiritual, Living the Simple Life, and Finding Balance, while identifying the values that will be important to consumers in the coming year.



Anxieties

2003 was, it has been said, "the year after the year after the year." While Americans seem to have accepted living with uncertainty, a pervasive sense of anxiety about the future still exists as the undercurrent of life today.

The Yankelovich Monitor, which has been tracking consumer attitudes for over two decades, reports that 84% of Americans agree "there are more things to worry about than a few years ago." Similarly, according to a Pew Center for the People and the Press survey reported in *Adweek*, 75% of Americans feel "the world is more dangerous than 10 years ago." *DYG Scan*, the trend identification program, finds that 61% of Americans agree that "the world seems much more dangerous today than it ever has in my lifetime." Another evidence of the consumer's heightened "sense of peril" can be found in the stress levels that are recorded in *Roper ASW* surveys: at their highest point in years.

A map of the current consumer anxieties would include:

The economy. While there are quite encouraging indicators of a recovery (a rise in the stock market, declines in unemployment, the renewed health of the luxury market), layoffs still remain a source of anxiety. The phrase, "jobless recovery" entered the language this year. *Research Alert*, the digest of research studies, reports that 56% of Americans say that they or a family member has been laid off. The gap between Haves and Have-Nots is increasing and remains the widest of all wealthy nations. The combination of the upscaling of America, job losses and the stagnation of salaries creates a fear of falling among the middle class.

The dot.com collapse, the stock market bubble, the continuing erosion of trust in corporate America as a result of Enronitis and, most recently, the revelations about Wall Street intensify anxieties about the economy.

In his 2003 book, *The Progress Paradox: How Life Gets Better While People Feel Worse*, Gregg Easterbrook examines the paradox captured in his subtitle. Since life has improved for so many people over the past decades, why do fewer and fewer people describe themselves as happy? A *Fortune* article, "If Things Are So Good, Why Do We Feel So Bad?" also examines the same paradox.

Whatever the cause, we should not be surprised if consumer confidence and optimism lag behind recovery statistics. It will take some time for economic anxiety to dissipate. It is still very much a factor this year.

Terrorism and the war. Anxiety is high about acts of terrorism abroad and the possibility of terrorism at home, about military losses in Iraq and about the steep declines, as reported by Roper Starch Worldwide, in favorable attitudes toward America in the world.

Health. Being able to afford health care insurance in the face of rising medical costs is cause for anxiety. Obesity has also

entered the consumer radar. It is now being called an "epidemic," intensified by the news this year that one-fourth of children 6-17 are obese. Concern is rising even about pet obesity! Food, as the Future Foundation of the UK states, is an "incarnation of the anxiety society." Witness the fact that fast-food restaurants are offering "healthy" choices, there are even some indications that portion sizes are decreasing and that consumption of French fries dropped for the first time this year, and not only because of the Freedom Fries movement.

Crime. While violent crime statistics continue generally to decline, crime is still a source of anxiety, as is white-collar crime, Martha Stewart and Wall Street being the prime examples in 2003. This year, however, concern was heightened about identity theft, up 79% since 2002 (*Research Alert*).

Privacy. Issues regarding the invasion of private space surfaced strongly in 2003 connected with the telephone and email, as witness the Do Not Call Registry and the clamor to do something about spam, which grew 76% in the last year alone (*Research Alert*). Concerns are also being expressed about such technological advances as the OnStar tracking system for automobiles that have the potential to invade the owner's privacy (*Trend Letter*).

Much consumer behavior can be read as responses to anxiety.

What is being called the "fear industry" is thriving. As *Trend Letter* points out, sales of personal protection items such as individual air supplies, water purifiers and survival kits are booming as consumers seek things that make them feel safe and secure. *DYG Scan* sees "risk minimization" as a key trend this year.

Is it possible that the public's fascination with reality shows that turn on fear, revulsion and humiliation such as *Fear Factor* or *Survivor* play out the anxieties underlying our desire for safety and security? In another indication of the culture's response to anxiety, *Cool News*, the daily Web trend site, notes the images of armor in women's clothing and fencing-style gloves this year, symbolizing "no one can hurt me."

Consumers also seek to escape anxiety by lowering stress. Meditation has joined yoga this year as stress relievers; both have entered mainstream behavior. *Time* magazine, which calls meditation "a great American trend," points out that 10 million Americans say they practice some form of meditation regularly. It is offered in schools, hospitals, corporations and government offices. Medicine is documenting its health benefits such as boosting the immune system or its ability to influence brain waves.

Nostalgia or the escape to the past is an anxiety-lowering trend that continues to get stronger and stronger. Games of the '50s such as mah-jongg are back as are character toys like Strawberry Shortcake or Ninja Turtles. The Food Channel *Trend Wire* has been tracing the appeal of Retro foods-cupcakes are the latest fad-and notes that we are now into Deep Retro-foods of the distant past: an old French recipe for duck slow-cooked in three broths, for example, or the cooking of ancient civilizations such as the renewed interest in the only surviving classical Roman cookbook. Saatchi & Saatchi's *Food For Thought*

newsletter devoted an issue to "adult returns to childhood" foods: restaurants that offer peanut butter sandwiches or jelly beans in flavors that appeal to adult tastes.

In *Time, Space and the Market: Retrospectives Rising*, professors Stephen Brown and John F. Sherry, Jr., explore how we evoke time past in products, buildings, and theme parks. Witness the success of the American Girl stores that sell historically correct dolls, business districts like Faneuil Hall in Boston or cities that restore old neighborhoods like Old Pasadena. The authors find *The Sims*, the most popular computer game, a throwback to the '50s in its family structures and neighborhoods, a "dollhouse for adults."

The desire to escape uncertainty and anxiety also fuels what *DYG Scan* calls our "passionate pursuit of escapism" through leisure activities, sports and entertainment.

Cultural Connections to Anxiety

In a world in which uncertainty and anxiety are undercurrents of life, anything that brands can do to help people feel in control and better able to "navigate their lives" will be culturally resonant, according to *Nilewide*, the research trend analysts. This includes:

- Increasing feelings of safety and security.
- Helping people lower stress by managing time, reducing complexity and promoting simplicity. The popularity of parent coaches and of outsourcing services such as Rent A Dad, Mr. Mom or Honey Do are examples of such services.
- Stressing the heritage, tradition and authenticity of a brand. Authenticity is surfacing as a dominant value this year, understandable in a time of uncertainty and anxiety.



Desires

Anxiety is present, then, in 2004, but so are desires. Two social changes brought consumer desires to the forefront: the '60s and '70s upheaval in values as well as the '80s and '90s rise in the standard of living. As a result, Americans are concerned not just with survival but also with living the good life. Although researchers and planners may still trawl for unmet needs, consumers have moved on to desires-"what I want" not merely "what I need." In fact, the *Roper ASW* annual presentation for 2004 sees "getting the life I want" as a basic motivation of consumers today.

Throughout the '90s this desire for the good life has been pursued in two directions: seeking intangibles that make up a meaningful life and accumulating tangibles-experiences as well as possessions-for the rich life. While 9/11 brought issues of survival once again to the fore, the pursuit of the good life is too entrenched in American culture to be set aside.



New Trends

Three trends emerging clearly this year will affect the very nature and definition of the good life for consumers. All three are linked to what has been the overriding trend of our time: technology.

Reinvention

One of the defining American myths is the belief in self-renewal, in being able to shed one's old skin and grow a new one. America has been a society that not only welcomed immigrants but also encouraged them to leave their past behind and reinvent themselves. Both the country's social mobility and the existence of the frontier made it easy for people to reinvent themselves.

We know that periods of either life transitions-leaving college, marrying, divorcing, changing jobs, having a child, retiring-or of great social change spur people to reinvent themselves. In a consumer society such as ours, one of the paths for reinvention is through brands, signaling a change of identity through the cars or clothing one buys or the stores and restaurants one frequents.

Recently reinvention has taken on new life because of what last year's "Consumer Context" called the upgrade society. In a society like ours, the rapid pace and rate of technological progress leads to widespread expectations that everything will get better and better just as Operating System 7 succeeds 6 or generations of Palm Pilots quickly follow one another. DYG Scan terms this openness to reinvention "extreme change-making," and sees Americans in a "mode of change and improvement" as a result of the upgrade society.

But what has also given reinvention the impetus it now has in America is the fact that the culture itself is undergoing profound change. The results of the 2000 Census, released over the last two years, have confirmed the extent and rapidity of the demographic changes happening in American society. Demographic changes, coupled with technological changes, bring about attitudinal changes, chief of which is the growing acceptance of change itself.

The most striking demographic changes are:

Ethnic diversity. Census results confirmed the growing multiculturalism of America, particularly the spurt in the growth rate of Hispanic-Americans. This year the Census Bureau announced that Latinos had become the country's largest minority. From Hip Hop, the music of an entire generation, to Asian philosophy and Latino food, the influence of African-Americans, Asian Americans and Hispanics is pervasive.

Family structure. The 2000 Census revealed that the percentage of single person households was greater than traditional married-with-children households. Over one-quarter of Americans are living alone. The high divorce rate and the presence of blended families as well as single-parent families have been accompanied by changes in social attitudes. All kinds of family structures are now accepted. A new book, *The Childless Revolution*, deals with the growing number of people in their childbearing years who are childless. An article in *The Christian Science Monitor* calls these changes "a demographic

revolution" that is "reshaping the social, cultural and even economic landscape."

Gender changes. Television shows like *Will and Grace* or *Queer as Folk* signal the growing acceptance of gays and lesbians. This year brought recognition of how widespread adoptions by gays and lesbians had become. It was also the year of a public debate about whether to allow some form of civil or religious marriage for gays and lesbians.

The country has also experienced sweeping economic changes, the most influential of which has been the upscaling of America.

The '90s witnessed the emergence of a mass upper-class, more people with more money than ever before. The end of the decade and the '00s also saw the spread of the "new luxury"- affordable premium quality products. Premium versions of products crowd the market: American Girl dolls, Starbucks coffees, enhanced waters, Godiva chocolates, designer pet foods, Sub-Zero refrigerators, the Bose Wave radio, Bath and Body Works personal care products.

Both kinds of change-demographic and economic-create a climate that encourages reinvention through brands. In an interview in *American Demographics*, Irma Zandl of the Zandl Group, which identifies trends, said of reinvention:

Over the next 15 years, driven by liberating new technologies, increasing social mobility and a very fluid sense of identity, we'll see more people-and brands- reinventing themselves. In much the same way that people create new identities online or alter their appearance with cosmetic surgery or digital enhancing, we'll see more people reinventing their whole personae-age, appearance, name, background, religion, career and lifestyle.

Clear evidence of the reinvention trend is the popularity of remaking the body. 2003 was the year in which Botox, recognized by the FDA, joined the lengthy list of cosmetic surgery and non-surgical medical procedures through which people remade their appearance. This year also saw the identification of the so-called Metrosexuals, men concerned with grooming and appearance. The public's fascination with television makeover shows such as *Extreme Makeover* and *Queer Eye for the Straight Guy* mirror this growing acceptance of reinvention.

Cultural Connections to Reinvention

- There is a new openness to change in the culture that brands can take advantage of. In *Reflections on a Cultural Brand*, Harvey Hartman claims that such culturally relevant brands "understand that the culture is changing" and "represent those changing values."
- One way brands can do this is to confront demographic changes in gender, ethnic makeup and family structure. Doing so will send a message to consumers that the brand recognizes and accepts that the world has changed.
- Another way is for brands to reinvent themselves and to aid consumers to do so. Certainly brands are a pathway to tradition and stability.

However, they can also help to resolve the contradictory elements in the consumer psyche: nostalgia for the past and openness to change. This combination of elements of the past, such as a well-loved design re-created with modern technology, is being called "retrofusion." A classic car such as the Thunderbird reintroduced with up-to-date technology is one such example. The American Girl doll shows how retrofusion can join with upscaling: building in history while offering modern customization.

Empowering the Individual

The overriding trends of the past decades were technology and globalization. In the '80s and '90s, information and communication technologies revolutionized the way we live and work. It seems pretty certain that the technologies that will have a comparable transformative effect in the '00s will come from the worlds of nanotechnology and biotechnology.

This year it is nanotechnology-the science of the infinitely small-we need to watch for its transformative effects on the power of the individual. These developments build on the sweeping transformation that has already occurred in the powers of the individual caused by communication technology: the ability to access huge amounts of information, to contact people instantly, to remain continually in touch.

Consider how often you read and hear the word "smart" today: smart houses with smart appliances, smart kitchens with smart refrigerators, smart ovens and smart irons, smart clothes, smart phones, smart packaging, smart watches, smart cars as well as smart roads and smart highways and smart cards.

What this use of smart is telling us is that we can now build qualities of human intelligence into objects. In this sense, smart objects refer to objects that can interact with human beings and perform on command or self-aware objects that can function intelligently on their own. It's clear that such objects have now left the realm of sci-fi and become reality.

This year has seen:

- Playmates' Baby Bright Eyes doll with nanomuscle technology that can interact with a child.
- The Roomba, on sale at Best Buy or Home Shopping Network, a robotic vacuum cleaner.
- Navigation systems that are increasingly available in luxury cars to guide you to where you want to go.
- The Whirlpool Polara range, both an oven and a refrigerator, which you can access from anywhere with a cell phone or Web browser. Depending on the messages you give it, it operates in cooking or refrigerating mode.
- The I See Pet Feeder that NTT DoCoMo, the Japanese mobile phone company, is introducing. It sends pictures of your pets to your phone when you're at the office and if they look hungry, you can direct the robot feeder to feed them.
- The Automate Stirrer, which, according to The Wall Street Journal, stirs a pot for you when you're not in the kitchen.
- The LG Internet Refrigerator, which tracks the refrigerator's contents and transmits a shopping list to a service like Peapod.

- Smart cancer drugs, which target the cancer cell only and do not affect healthy cells.

In an upgrade society like ours, new versions of technology follow quickly. Where a few years ago robots existed as prototypes, there are now product-sized versions of home robots. As the section on "How We Nest Today" in *The New York Times* explains, some are autonomous and self-directed, performing menial tasks around the home, while others act at the user's bidding, triggered remotely from phone or Internet, taking pictures around the house, and relaying information.

Clothing with nanotechnology that repels stains and wrinkles and can warm or cool the wearer is now available. Nano-Tex socks, which absorb body odors and do not release them until they are washed, and Sensatex T-shirts, which monitor heart rate and body temperature through fibers that receive and transmit information, will be on the market shortly (*The Ecologist*). Infection-fighting bandages and self-cleaning windows are ready for general use.

We can expect to see self-driving cars and intelligent roads, according to *Automotive News* and *U.S. News & World Report*, with such features as adaptive cruise control, fatigue management, a display which presents vital information to the driver such as road conditions or traffic problems floating freely over the hood and sensors embedded in roads that control speed and closeness at intersections.

Marshall McLuhan, the communications seer, saw radio as an extension of people's ears and books or TV as extensions of their eyes. McLuhan's vision reflects the effect of smart technology: we build objects that are self-aware, intelligent and interactive and they, in turn, empower us. Since individualism is the basic American value, anything that affects the power of the individual will have consequences in how Americans see themselves.

What self-reliance was to the '90s, empowerment through technology will be for our decade: self-reliance redefined by technology. *DYG Scan* calls it "personal power," but it is a new form of self-reliance, transformed by the way technology is extending our personal power into our world. It is the '00s version of doing it yourself: empowered people able to live and work more effectively, exerting power and control over their immediate environment. There's even a group of people called Transhumanists who believe in empowering human beings through technology even to the point of genetic alteration.

Considering the level of anxiety and uncertainty we are living with, it's no wonder that a value such as empowerment should be immensely appealing. In fact, the *Yankelovich Monitor* reports that one of the signs of success for Americans is "being in control of your life," a statement that 76% of the public agrees with as compared to only 57% who did so in 1991.

Howard Rheingold, who writes on how technology affects our lives, talks in an interview in the magazine *Reason* of the credo of his *Whole Earth Catalogue*: "access to tools." He says:

It goes back to Emerson and "Self-Reliance." It's a pretty radical American idea. You don't have to rely on some distant institution

whether it be government or religion, to give you power and give meaning to your life if you have the tools and the knowledge and the freedom to do it yourself.

Rheingold adds, "it's all about power and choice." That's the empowerment of the individual technology is bringing about. Nanotechnology, which *Trend Letter* defines as "the breaking down of common molecules to such a miniscule size that they behave in unexpected-and often-extremely helpful ways," is taking the good life to a new level: the empowered life.

Cultural Connections to Empowering the Individual

- In a world where so many things are out of consumers' control, anything a brand can do to contribute to feelings of power and choice will resonate culturally.
- The smart brand is a relevant positioning now and will be so in the future, whether the smart car, a smart household cleaner or a smart kitchen wrap. However, brands must link the technology to the consumer value of power and control.
- The good life is coming to be defined as the smart life, a life that takes advantage of all smart objects to control one's environment. Being smart, is, in fact, a new status symbol.
- Brands need to discover how to speak to this new technologically empowered, self-reliant individual. The value of authenticity is a place to start.

The New Community

While we're considering smart objects, let's not forget about smart mobs. That's Howard Rheingold's name for what are more often called flash mobs. Flash mobs consist of people who communicate through phones, pagers and the Internet, gather suddenly at a designated place, "perform some specific but innocuous act," as *The New York Times* article, "We're All Connected," explains, and then suddenly scatter. They are groups formed around common interests, enabled to communicate and act by technology.

A Toys 'R' Us store, the rug department in Macy's, or a street corner can be the place in New York, London, Chicago, San Francisco, or Berlin. In *Smart Mobs: The Next Revolution*, Rheingold examines what this phenomenon means for individuals and groups. Rheingold claims that these new kinds of mobs "herald new forms of social interaction." *The Times* article sees them as "networks made tangible."

Whatever they are, flash mobs symbolize a new form of community that's occurring across society and that is redefining the nature of the group just as communications technology and nanotechnology are redefining the powers of the individual. *Nilewide* called the relationships formed by communications technology "liquid relationships":

Clearly technology has a huge influence on the way that relationships are begun, conducted and ended....No one could ignore the role of instant and text messaging, emails, chat rooms and mobile phones in molding the shape of today's relationships.

The cultural groundwork for these new forms of community was the growing importance of "connections and community," as Yankelovich termed them, throughout the '90s, accelerated by 9/11. One's family, one's home, one's country all gained more meaning for consumers.

Another factor in the emergence of the new community has been the shift in consumer attitudes that *The Wall Street Journal* termed "The End of Nesting." It is a phenomenon first mentioned in a study by Unity Research, which announced the emergence of a new type of luxury consumers. The study named them "butterfly" consumers, who flew out of the nest of home to connect with the world. The behavior is now seen as characteristic not just of luxury consumers, but also of consumers in general.

The shift has been summed up by the *Journal* as a movement from cocooning to hatching. The *Journal* article reports that "in surprising numbers, Americans are returning to gyms, parties, even restaurants." Activities such as gardening, bird watching and hiking are on the rise. Roper ASW has called this shift "local area nesting," as consumers move out of the home, but remain close to it.

One characteristic of this new form of community is active participation. The Zagat guides offer a non-technological example of participatory communities. These guides to restaurants and now theatres and music as well are compiled from hundreds of reviews sent to the Zagats by ordinary people, not critics or reviewers. Similarly the *Chicken Soup for the Soul* books-and they are legion, for the Teenage Soul, for the Grieving Soul, for the Jewish Soul-are compiled from the stories ordinary people send in, not written by an author. In both cases, people have become active participants not passive consumers. Even the recipes on Epicurious.com are followed by the comments of cooks who have tried them out and offer critiques and suggestions.

An example of the new forms of community emerging in America is the political campaign of Howard Dean. According to *Trend Letter*, the very nature of the political process is being changed by the "power of the Web to mobilize and elicit responses from constituents." Through MoveOn.com, Meetup.com and Web blogs, those increasingly popular electronic journals, thousands of like-minded people became active participants in the political process rather than passive bystanders.

Another phenomenon that illustrates this new form of community is what is being called the tribalization of the young. A *U.S. News & World Report* article, "Urban Tribes: A Generation Redefining Friendship, Family and Commitment," reports on the families of friends being formed by men and women of Gen X and Gen Y in the now greatly extended single years before a typically delayed marriage. These tribes, of course, are reflected in television shows like *Friends*, *Sex and the City*, and *Will & Grace*. The growing number of single adults also contributes to this tribalization as singles typically have larger networks of contacts.

Members of these generations are used to staying in touch through instant messaging, PDAs, the web, cell phones and pagers. Groups of Japanese teens called "Thumb Tribes," in fact, use these electronic means to spend the day together though they may be in different locations. Web sites such as Friendster.com are also used by men and women in these generations to meet like-minded people.

Market research has been focused on this new form of community for the last few years. There has been a growing interest in social network research, for example, as well as in how word of mouth and buzz operate. The popularity of Malcolm Gladwell's book, *The Tipping Point*, analyzing how communication is transmitted by hubs, connectors and salesmen in social networks, is an indication of this interest. The Latin school of market research, which insists upon the social and tribal nature of human beings, is another example. These researchers believe that marketing must concentrate on how decisions are influenced by the groups with which individuals bond (*Nilewide*).

Technology, therefore, has influenced the basic dynamic in American society—the relationship of the individual and the group. It has enhanced the powers of the individual as well as the powers of the group. What we can expect to see in the next few years are increasingly empowered individuals actively coming together in new forms of bonding.

Cultural Connections to the New Community

- Marketing is being taught a lesson by the new communities springing up across the culture. Research will be forced to shift attention to the effects of social groups on attitudes and decisions. As Nilewide writes, research and marketing will have to "move away from just thinking about an individual's relationships with a brand or company to their relationships with others."
- Another shift in marketing and advertising will be the focus not on one-to-one communications but on communicating through social networks and word of mouth. Increasingly brands will have to respond to the differences in communication styles of Gen Y and X and of singles.
- Storytelling, which has been the focus of much attention lately, is an avenue to the kind of participation characteristic of the new community. Web sites like Friendster.com, blogs, the Chicken Soup series of books and the Zagat guides offer a pattern for brands of achieving authentic participatory communication with consumers.

Older Trends

No discussion of the trends affecting consumers this year, however, can overlook those trends that emerged and grew stronger throughout the '90s and still exert powerful holds on consumers today:

- **Design for Everyone**
- **Pursuing the Spiritual**
- **Living the Simple Life**
- **Finding Balance**

Design for Everyone

This was the year when the designer Isaac Mizrahi produced a line of clothing for the mass merchandiser Target; the year that saw the publication of a book on *feng shui* for pets; the year men's oxford shirts appeared in bright colors and patterns. What these examples attest to is the movement of aesthetic considerations into the mainstream for Americans. How something looks,

whether it is pleasing and tasteful, has emerged as an important aspect of brand consideration for consumers.

Design is part of this movement toward aesthetics. A *Newsweek* article, "Design Gets Real: How It's Changing the Way We Work and Live," states that "never has design been more accessible." A number of articles this year have documented the phenomenon of "universal design" -a shift in design away from the invention of new objects toward the reinvention of everyday objects to make them more functional and pleasing. The upscaling trend, of course, has given impetus to considerations of form, color and shape that have now become markers of quality products.

A new book, *The Substance of Style: How the Rise of Aesthetic Value is Remaking Commerce, Culture and Consciousness*, is a sign of the growing importance of style. The book documents the diversity of objects now available in which style is a key component: "appliances, phones, bathroom fixtures, home interiors, designer coffees, ethnic cuisines, and Apple iMacs in many colors." It also offers other evidence of how widespread these considerations have become: in 1970 there were three design magazines; now there are fifty. Home improvement TV is a new genre. Style, of course, now has its own network. "We still care about cost, comfort and convenience" the author claims, but "aesthetics matter more and more."

The articles and books on the mainstreaming of aesthetic considerations point to the acceptability of many different styles. There is no one approved style as the modern style once was. In style, as in so many other aspects of American life today, diversity rules.

The simplicity trend that moved from the fringe into mainstream in the '90s has entered design as one possible style-minimalism as in the "get rid of clutter" movement. Another popular style is borrowed from Japan and known as *Wabi Sabi*. It is the style that features imperfections: showing the seams on the outside of a dress, tearing the material. Have you noticed the uneven hemlines on mainstream skirts this year?

The increasing attention to style involves the body as well as objects. It helps explain men's growing concern with their appearance and the willingness of both men and women to undergo cosmetic surgery.

Style, in short, has emerged as a new value underlying the design-goes-mainstream trend. Increasingly the good life, the meaningful life, is also being defined as the tasteful and aesthetically pleasing life.

Pursuing the Spiritual

Throughout the last decade of the 20th century, as Europe became more secular and church attendance declined, America became more spiritual. Spirituality remains one of the chief trends defining today's consumer.

This emphasis on the spiritual has not taken the form of increased religious attendance at mainstream houses of worship, but rather people pursuing:

- Fundamentalism, whether born-again Christianity or Orthodox Judaism.
- A mix-and-match style of religious belief, blending eastern and western

religion and spirituality-church attendance, meditation, beliefs in reincarnation.

- Spiritualism-beliefs in the occult.
- A rising concern with ethics and morality that has affected attitudes toward business. A majority of Americans now believe corporate America has a social responsibility. The concepts of social entrepreneurship and social capitalism have become prominent this year.

Anyone who wants to understand the American consumer today has to deal with the fact that 81% of Americans believe in an afterlife and 76% believe that heaven actually exists (*Research Alert*). The *Yankelovich Monitor* has documented the public's rising beliefs in spirituality: in 1998, 52% of Americans said they believed in spiritualism versus 12% in 1976; 25% in reincarnation versus 9% in '76; 45% in faith healing versus 10% in '76. A recent *Roper ASW* survey notes that almost six in ten Gen Xers and Gen Yers consider themselves spiritual. A Gallup poll reports that about 40% of Americans consider themselves Evangelicals or born-again Christians.

Television and the movies are filled with examples of the public's spiritual-religious-occult-ethical bent: this year has seen the *Lord of the Rings* movies, the *Harry Potter* series, the *Matrix* sequel, the *Joan of Arcadia* TV show. Books on religious subjects fill the bestseller lists-the *DaVinci Code*, Gary Zukov's books on soul, the end of life series. Beliefnet.com. is a popular Web site for spiritual discussions and help. Iconoculture, the social trend people, cite the popularity among moms today of books such as *Bible Verses for Busy Moms* and *My Monastery is a Minivan*.

The meaningful life, therefore, is increasingly defined as the spiritual life. Spirituality is a dominant value of consumers today.

Living the Simple Life

Another trend affecting consumers is Simplicity--the desire to ground your life in what's important. Of course, the value of Simplicity has always had appeal in America since Thoreau went to Walden Pond in order to learn how to reduce his life to the essentials. Thoreau's injunction to "Simplify, Simplify" became the mantra initially of a small group of consumers who wanted to opt out of the fast-paced, possession-filled life.

In the '90s the Simplicity movement entered the mainstream, as the thriving magazine *Real Simple* testifies. This year has seen the Simple Living Network and the Center for a New American Dream, which provide advice on living simply, as well as the Web portal Simplicity, which consists of resources to help people get out of the consumption spiral. A new field of professional spiritual coaches has come into existence.

The ideal of the simple life translated into mainstream behavior takes the following forms this year:

- Getting rid of clutter. Witness the popularity of people who will organize your life and your possessions. Yankelovich sees this as evidence of a "post-accumulation marketplace" in which people have so many possessions that they are drawn to "shedding stuff."
- Making more time by outsourcing. The recognition of how many more

hours Americans work than Europeans is widespread. Last year saw the beginning of a movement to establish a "Take Back Your Time Day" and books such as *Take Back Your Time: Fighting Overwork and Time Poverty in America* and *It's About Time: Couples and Careers*. The popularity of easy-cook cookbooks, buying meals from personal cooks, the explosive growth of take-out, outsourcing family services including parent coaches are recent evidences of this trend.

Finding Balance

Balance-which now has a magazine of its own, called, of course, *Balance*-continues to be for consumers a value to be pursued. Finding a balance between work and family became more and more important with the growing emphasis on home and family as a refuge throughout the '90s and after 9/11. The value has also been influenced by the spread of Eastern ideas emphasizing the harmony of opposites, of yin and yang in the good life.

Besides the discussions in the popular media about this value, among the signs this year:

- The increasing dissatisfaction with work, reported in many surveys of worker attitudes. The Conference Board reports the highest levels of worker discontent since the organization started studying it in 1995. According to a *USA Today* article, 61% of 20- to 29-year-olds are unhappy in their current job. The Yankelovich *Monitor* points to the high percentage of workers who say they would rather have more time than money.
- The trend (still small, but growing) of mothers leaving the workforce to stay home with young children. The Census figures report that the percentage of women in the workforce with children under one year dropped from a record high in 1998 of 59% to 55% in 2000 and seems to be continuing to drop. In an article in *Business Week*, Gen X women testified that they consider balancing work and home their biggest challenge.
- The appearance of a school of novels being referred to as Mommy Lit, which depict the struggle to balance work and family: *Amanda Bright@Home*, *Babyville* and *I Don't Know How She Does It* are popular titles in this genre.
- The growing numbers of men who choose to be stay-at-home dads. According to Census figures, more than 100,000 dads are primary caregivers. This year has also seen the growth of support services for these fathers, including www.slolane.com, Daddy and Me art classes, magazines and parenting books for men (Saatchi & Saatchi presentation, "The Future of Mom").

Cultural Connections

Increasingly the good life, then, is defined by consumers as one that is spiritual, simple and stylish while managing to balance human values of family and friends with work. Each of these trends suggests cultural connections to be formed with consumers:

- A direction for brands is helping consumers simplify and balance their lives.
- Brands must recognize the growing importance of the spiritual dimension to consumers. The reinvention trend suggests the openness

consumers are feeling to self-renewal. The vision of the good life we project through our brands has to further this search for transformation.

- At no other time has a company's ethical/moral stance toward its employees, its customers and society as a whole been more important. A social and moral audit must be a company's continuing concern.
- Brands have an opportunity to speak to consumers' growing awareness of design in all aspects-product, packaging and communications.

Trends are signposts, directing us to the underlying values that are important to consumers. This year the set of values includes authenticity, empowerment, community, spirituality, simplicity, style, and balance. It is these values that make up the cultural context of 2004.

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