



Study Reveals how Women Recalibrate the American Dream

And the New Opportunity for Brands



When our Founding Fathers established the Declaration of Independence in 1776, they highlighted “Life, Liberty and the Pursuit of Happiness.” Sadly, in our current state of global conflict, economic uncertainty and bloated personal debt, it’s been declared that the American Dream is dead.

But is it really?

In a recent study by Xavier University, 55% of Americans said they have lost trust and confidence in our country. Yet, 63% of Americans are extremely confident or fairly confident in their ability to reach the American Dream.

Why the contradiction?

Think about it. Aspirations over the decades have changed. It goes back to the “new frontier” when men and women sought the Wild West; to FDR’s social reform of The New Deal and establishing social security; to escalating aspirations of the 50’s and 60’s when television shows like *The Honeymooners*, *Father Knows Best* and *Leave It To Beaver* seduced Americans into a new pride of suburban life – including home ownership, cars and sending their kids to college. Then there was the introduction of credit cards in the 70’s and our country’s willingness to take on debt. Clearly the evolution to that basic American Dream has morphed. Add to that, Reagan-onmics, deregulation, and ad campaigns that emphasized, “Because I’m worth it.” Since, the 1990’s and 2000’s continued access to easy credit and out-of-reach mortgages.

Until it all came crashing down.

Now what?

This is a monumental shift in history. A time when Americans are redefining what the American Dream looks like and what it means.

To uncover the reality of what’s really happening, we set out to examine American women’s attitudes and behaviors about the future of the American Dream, and the opportunity for brands to play a more meaningful role in women’s lives.

What we discovered...The dream has changed.

Or has it really?

The White Picket Fence has Vanished

Don't fence her in.

Women are redefining what achieving the American Dream means to them and it doesn't include the white picket fence. Visions of the classic suburban home, 2.5 kids and being financially supported by a successful husband have become a thing of the past as women today become more self-reliant and independent.

Realism not Idealism.

Women are paving their own way and defining what their lives will be. Her independent attitude and sense of purpose means she is in charge of her destiny and her dreams are her own – not someone else's. Her vision is one of realism not idealism as more and more women feel being grounded with a great career and sense-of-self takes precedent over rushing to the altar and having a minivan in the garage.



Women are independent in their quest for the American Dream today. They no longer rely on a man to provide income and a roof over their head.



The proportion of married households in the United States is currently 49.9%, a 36% decline from 1950. (2010 Census Bureau)



Only 15% of women ranked owning a home as the #1 or #2 most important for a happy and fulfilling life.

"Prince Charming" Need Not Apply

Labor – no longer just in the delivery room.

Women are now benefitting from the courage and persistence of earlier generations when the fight for equality began. Today, women are more educated, there are more women in the workforce, and they have more economic and professional power than ever before – being recognized as some of the brightest minds and boldest leaders in politics, economics and business. As a result, they are an equal force in contributing to household income and household decisions.

A “champion” in her corner.

She’s redefined the traditional “Ozzie and Harriett” role of husband and wife. When it comes to marriage, she no longer needs a man to complete her, but rather a partner to complement her life. She wants a husband who is in her corner, who shares life’s ups and downs and is her equal in every way – diapers and all!



Women account for 51.5% of all workers in high-paying management, professional, and related occupations. (Dept. of Labor)

“The American Dream is to have the same opportunities as men. It doesn’t mean women cannot take the traditional route if they want to, it just means they have the same range of options as men.”



“The dream has absolutely shifted. Women have a constant presence in positions in industries that just a decade ago were dominated by men. We won’t let anyone tell us we can’t do something because we are a woman.”



Although women have re-defined what they are looking for in a husband, nearly half (46%) rank “A Happy Marriage” as the #1 or #2 most important aspect of a happy and fulfilling life.

Re-trenching: Back to Basics

Simple is better.

As the swelling material appetites of Americans explode, along with their debt-to-income ratios, women see the critical importance of getting back to basics. Faith and spirituality are giving her a sense of solace and a respite from today's uncertainty.

All the right stuff.

Friends and family are what matter most. It's less about things and more about the people in her life that give her personal fulfillment and joy. Love, friendship, and keeping those you love close to you are what matter the most, and provide her with more satisfaction than anything money can buy.

“Chuck the material crap – find your spiritual voice.”



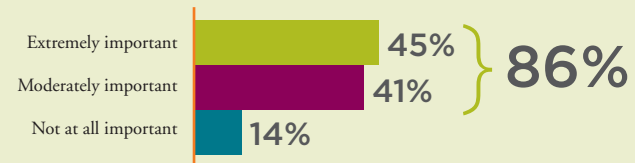
“In the end, the American Dream is all about family – which today takes many forms and colors – and keeping those you love happy and healthy.”



Despite the reality of more women in the workforce, married women are spending 21% more time/wk and single women are spending 57% more time/wk with their children than they did in 1965. (*Changing Rhythms of American Life*, Bianchi and Robinson)



Faith provides solace to women in today's conflicted world.



How important is spirituality, faith or religion to you?


A Sense of Humanity Prevails

Less about needs. More about deeds.

Poverty. War. Global economic meltdown. The world has been spinning out of control. Women are taking responsibility for making it a better place. She's re-setting the moral compass and getting things moving in the right direction with kindness, honesty and a sense of community.

It's not just saying – it's doing.

Her need for giving back and being socially responsible has never been stronger. There's a higher standard to be set for showing compassion, volunteering and doing what's right – and it starts with her!



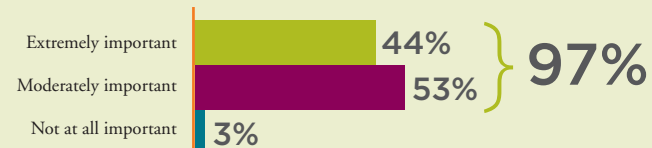
The American Dream today is about less 'things' and more about community.



Despite the personal hardship in our recent economic recession, the volunteer rate in the United States has increased 2.5%. (*U.S. Bureau of Labor Statistics*)



“Giving Back” is important to women of all generations.



How important is community service and “giving back” to you?


The Freedom to Choose

She can go her own way.

Individuality reigns. She feels that society no longer dictates how she should live her life or the path she takes to get there. Achieving the American Dream is having the freedom and control to pursue her goals and ambitions – finding her own path to happiness – at her own pace.

Not our mothers.

Generations of women have paved the way for women to realize that while it's not easy to balance career and family, it is possible to “have it all” (if she wants it). It's no longer career VS. family, it's career AND family. She is the one calling the shots, deciding what's right for her future without feeling the pressure to compromise between education, career or family anymore.

 *“The American Dream through the eyes of a woman today is creating harmony and balance between life and career. We want to be a friend, a wife and a mom...but we don't want any of these things to define who we are – we want a collaboration of each. We want to make a difference in the world. We want to be successful and inspirational. We want the means and the ability to take care of ourselves and our family. We simply want it all...and still have time for a nice long bath!”*

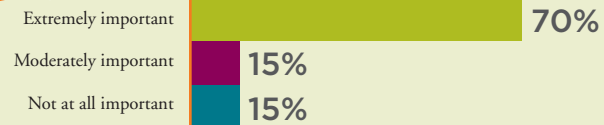


- 30% of Americans have never been married – the highest in 6 decades.*
- The number of stay-at-home moms dropped last year for the fourth year in a row to 5 million, or roughly 1 in 4 households.*
- American women have surpassed men in gaining advanced degrees for the first time in history.*

*2010 Census Bureau



Women today “want it all”, including children.



How important is having children to you?

Realizing the Power of Her Voice

Lost, but now found.

Women have found their voice and have the resolve to use it. She strives for a sense of identity that reaches beyond the supportive, traditional roles of being a mother, a wife or a daughter. She recognizes the importance of knowing who she is and what she needs to be happy.

Hear her roar.

The ongoing rise of women's authority and increasing social media outlets, help feed her empowerment and spread her influence. She not only feels the need, but also the responsibility to speak out and gain support for the things that matter most to her. Along this quest for creating a life of meaning and purpose, she is bannng together with other like-minded women to influence change in the world.



Women spend 30% more time (in any given month) on social networking sites than men. (*comScore, Inc., 2010*)

“Listen to your own drummer!”

“Speak up and take a role in things you think are important. Find your voice and do something.”



“Women who share their feelings and their outlooks help others to do the same.
Where there is common ground, one can generate major change.”

“The American Dream is feeling whole, having meaning and purpose in your life and making a difference.”

Love Thyself

The possibility of me.

More than ever, women realize that true happiness lies within, and it all starts with loving herself first. It's about following her dreams and passions...and never, never settling!

From me to you.

Her own health and wellness is her number-one priority. She understands she has to take care of herself before all else. By achieving inner confidence through a balance of her mind, body and spirit, she has the strength and self-assuredness to nurture and share her life with others.

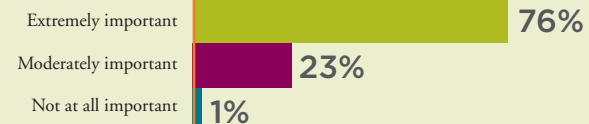
“The American Dream is having what you, personally, need to be healthy and happy – inside and out.”



“Don't look for happiness in material things. It can't be found in career, money or even relationships. It comes from within.”



Women today recognize the importance of staying healthy.



How important is managing and taking care of your overall health and wellness to you?

What It All Means



Back to the future.

The ideals women are advocating today really go back to our Founding Fathers' original vision... **The Pursuit of Happiness.**

Yes, things have finally come full circle.

Her need for independence, equality, humanity, putting family and community first, freedom to choose, making a difference, and paving her own destiny, all circle back to what the people who first came to this country were seeking...the dream of a better, richer, and happier life for all.

And it didn't equate to an endless AmEx credit line or a McMansion at the end of the block.



The American Dream is to grow as a woman and find beauty, health, happiness and success from within rather than the materialistic American Dream - the 'monetary wealth' dream is unfulfilling in every way.

The Opportunity for Brands -- Me, We, Higher Purpose™

This shift in values and perspective creates a rare opportunity to fundamentally change how women feel about brands. It's an opportunity to create a sustainable competitive advantage by demonstrating that she matters and taking the consumer/brand relationship to a higher, purpose-driven level. To get there, it comes down to three things: "me, we, and higher purpose."

Taken together, these three ideas point to the future of marketing and endless opportunities for innovation and business success.

ME. First, we need to re-think the intensity of the relationship our brands have with women. It's about getting to a deep, aspirational desire or need.

The magic of "me" can be found in a deep dig with the consumer, while also understanding where our brands fit in that world. We call this the *Emotional Truth*™ — that one, single, subconscious, emotional trigger that's most relevant to our brands in her life.

When we connect with women at "me", we're letting her know she's appreciated and we're on her side. From a marketing standpoint it's a shift from "what" to "why". It's no longer about features, benefit and promises. It now becomes more about why the brand is relevant to her self-discovery and empowered world.

WE. The "we" is about fulfilling her sense of belonging. She wants to have a feeling of one-ness, a feeling that she's part of something larger than herself — both with other people as well as with a brand. We can accomplish this by joining together in shared values and shared ideals.

This is a big shift for marketers because it moves the relationship beyond "us" (the brand) and "them" (the consumer) to become "we." But if we want her to join us, we have to begin to see ourselves as equals. We need to get to a place where we are at one with her, working toward the same goals, and sharing a sense of being part of something we — and others like us — care about.

As the brand we become the enabler of the conversation, not the center of the conversation. We need to blend into the background because that's a key part of this sense of belonging.

In fact, the consumer is not in the middle of the conversation, either. It is the idea — the sense of fulfillment — that's in the middle of the conversation and we are all equal in moving that forward.

Doing so requires patience. We have to give up control, stop thinking about ordinary business issues and think about the benefits we're bringing.

In the end, this creates the strongest kind of loyalty because we are standing for something she wants to belong to and be a part of.

HIGHER PURPOSE. Having a "higher purpose" fulfills her desire to make the world a better place. This is a fundamental desire and it will continue to grow. Women today are desperately seeking ways to find greater meaning in their lives.

She is looking for people, ideas and brands that she can trust, intimately. She is open to joining with brands that are transforming communities, society and the world. Brands that care.

She wants to feel that she's made a difference in the world. And she's looking for places she can do that. If your brand can help her fulfill that desire, she will want to be part of it. She will reach a higher purpose and fulfill a deep need for meaning in her life. From a marketing standpoint it requires a shift from focusing on a transaction to bringing meaning in her life.

The deeper the "me" is and the stronger the "we" is, the more powerful is our ability to achieve higher purpose. They're linked and it's all based on an *Emotional Truth*. So, ask yourself, what is the *Emotional Truth* for your brand?

ME

- Fulfills a deep, aspirational desire
- Shift from "what" → "why"

WE

- Fulfills her sense of belonging
- Shift from "us" and "them" → "we"

HIGHER PURPOSE

- Fulfills her desire to make the world a better place
- Shift from "transaction" → "meaning in her life"

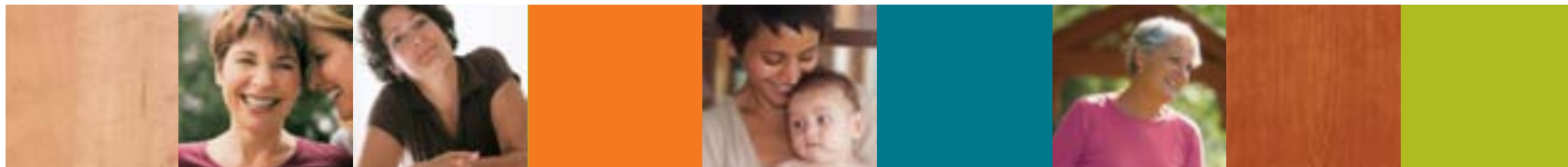
About WomanWise

WomanWise is a full-service insight consulting firm specializing in marketing brands to women. The firm was founded in 1988 with an ambitious vision to create *Brand Enthusiasm*[™] and drive purchase. Nearly 15 years ago we realized that our passion and strengths had succeeded in breaking new ground in what decidedly became our specialization – marketing brands to women.

WomanWise's unconventional insight approach to discover the subconscious behavioral drivers that create emotional connections between brands and women has fueled unprecedented client results and gained the firm international recognition. Our diverse client experience includes Novartis Pharmaceuticals, Land O'Lakes, Pillsbury, UnitedHealthcare, Dunkin' Donuts and many other leading brands.

WomanWise services include:

- Women's Market Segmentation
- Female Target Dimensionalization
- Women's Insight / Shopper Insight
- Social Media Observation and Insight Mining
- Innovation Platform Development and Exploration
- Brand Platform, Positioning and Identity
- Entrepreneurial Business Idea Generation and Planning
- Creative Strategy and Holistic Marketing Communications
- Speaking and Marketing to Women Workshops



About this Study

Methodology

- Proprietary online survey with close-ended and open-ended questions
- Secondary research and literature review

Who we Talked To

- 800 women across the country
- WomanWise Panel™ Database and Research Now™ Online Panel

What we Set Out to Better Understand

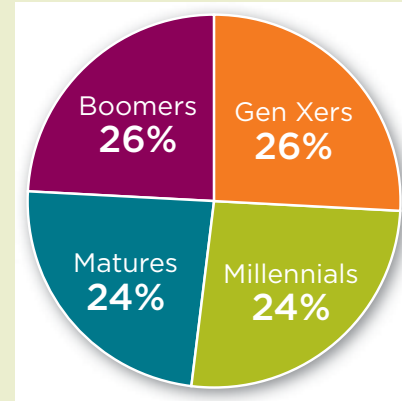
- What is most important in women's lives today?
- How do women define the American Dream today?
- Do women think the American Dream has changed? If so, how?
- What words of advice do women have for future generations about finding happiness and fulfillment in life?

Secondary Research and Literature Review

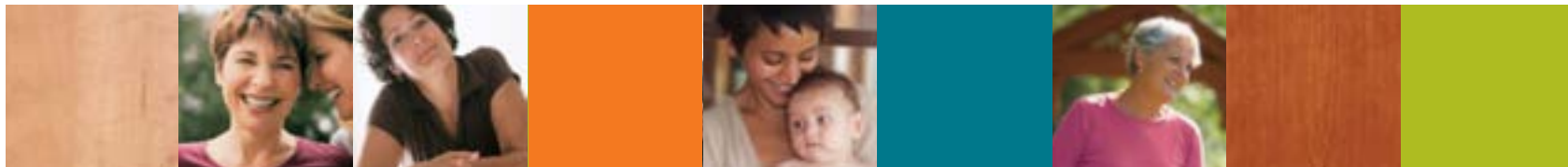
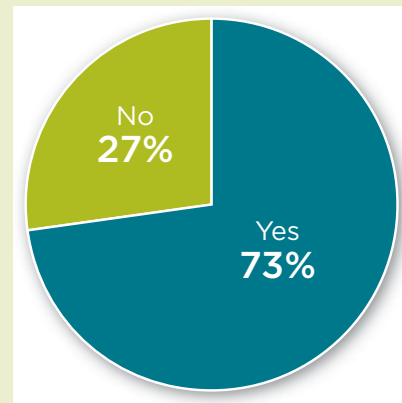
- Economic Mobility Project Study - March, 2009
- Second Annual State of the American Dream Survey™ - Xavier University, March, 2011
- The Power of the Post-recession Consumer, John Genzema and Michael D'Antonio (Y&R's Brand Asset Valuator Study) - Feb, 2011
- Cone Cause Evolution Study - 2010
- Re-thinking the American Dream, Vanity Fair - April, 2009
- *The Epic of America*, James Truslow Adams - 1931
- *Changing Rhythms of American Family Life*, Bianchi and Robinson - 2007
- U.S. Census Bureau - 2010
- U.S. Bureau of Labor Statistics - 2010
- comScore, Inc., Report - 2010

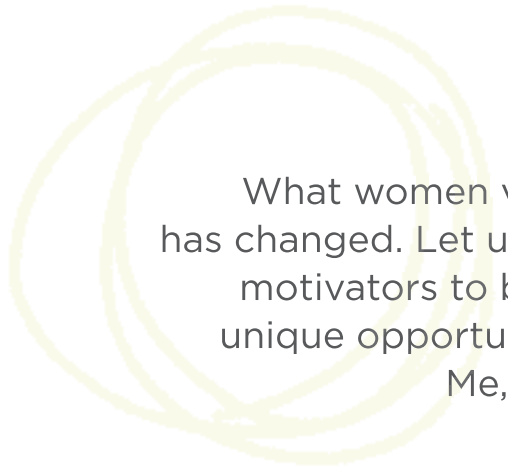


Generational split of WomanWise Survey sample (800 total women)



Do you think the American Dream has changed for women over the past decade?





What women value and seek from their brands
has changed. Let us help you uncover her subconscious
motivators to behavior and define your brand's
unique opportunity space to fulfill her craving for
Me, We, Higher Purpose.™



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