

MIDDLE-CLASS MOMS & THE RECESSION

White Paper



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PURPOSE

According to the Marketing to Moms Coalition, women are primarily responsible for either making or influencing 85 percent of all purchasing decisions in the United States.

The purpose of this white paper is to capture the attention of companies and marketers at a pivotal time in history when the values and attitudes of American middle-class moms are undergoing a dramatic shift like never before. Consequently, this transformation will significantly alter their purchasing practices now and in the future.

INTRODUCTION

This is not the first recession in America, and it will not be the last. Some financial wounds will leave us bruised for the short term, while others will leave lifetime scars. Nonetheless, if the cycle of recovery repeats itself, the most lasting benefit from the pain is a watershed shift of consumer attitudes.

No other demographic has manifested this change of disposition more readily than middle-class moms. And at the root of their enthusiasm is a tenacious viewpoint that hard times will make their families stronger - not weaker.

According to *Time* magazine: “This is the end of the world as we’ve known it. But it isn’t the end of the world. Now that our age of self-enchancement has ended, each of us, gobsmacked and reality-checked by the new circumstances, is recalibrating expectations for the timing and scale of our particular version of the Good Life.”

Anderson, Kurt. “The End of Excess: Is This Crisis Good for America?”
Time (April 6, 2009): 32–38

The middle-class mom has chosen to meet the challenges of the recession head-on, but with renewed values in place. Her version of the Good Life for her family has shifted away from the accumulation of monetary things to the accumulation of meaningful experiences.

“We have all been forced to reexamine ourselves. Our material selves have had to shop at, dare I say, Thrift Stores? Our physical selves have had to give up the luxury of being part of that coveted gym or volleyball league. Our emotional selves have given birth to new emotions, heightened levels of stress over money...so we adjust. We are not the first generation to have to live without.”

Maureen, Braintree, MA. “Middle-Class Moms & the Recession”

Middle-Class Moms & the Recession is a social exploration of middle-class moms located in Braintree, Massachusetts and Denver, Colorado.

EXECUTIVE SUMMARY

Middle-Class Moms & the Recession explores the fundamental shift of values in this key demographic by exploring how moms think and feel as a result of the recession. It highlights recession-inspired purchasing practices moms embrace, as well as the ones they tolerate as temporary sacrifices.

As moms refine their purchasing habits, what changes are they making and how are these changes making her feel? These are the driving questions behind a study commissioned by advertising, interactive and public relations agency E.B. Lane.

In creating this study, E.B. Lane retained research and brand consultancy, SenseTruth. Under the direction of founder, Tamara Thompson, SenseTruth concentrated on the middle-middle to middle-lower class mom. Income, occupation and education were categorical factors considered, as were number of children, wage earners and the need for childcare. While these women came from a wide range of family units, all had one or more child living at home.

In a recent study conducted by the Marketing to Moms Coalition, 60 percent of moms said they felt that marketers are ignoring their needs. An alarming 73 percent felt that advertisers don't really understand what it's like to be a mom. While many marketers focus on the various inflection points in the lives of moms, few strive to uncover the desires and values that drive their behavior.

To do so, marketers need to respect that the role of mom is complex with different facets, often contradictory to each other. For the purpose of this white paper, we refer to these varied facets as separate –selves. Focusing on moms from a holistic perspective enabled E.B. Lane to shine a light on those unique aspects that influence them.

Family-Self: The most rewarding of all facets is her role of being a mother.

Opportunity: Communicate with lighthearted contentment and capture the emotion of family. She believes these hard times will make her family stronger.

Work-Self: Her feelings toward work vary from frustration to fulfillment depending on her level of financial responsibility to the household.

Opportunity: Even when times are bad, moms look to the future with optimism. Marketers can relate to her by communicating enduring values and strong work ethic over promises of artificial success.

Social-Self: The social self, fueled only by her closest girlfriends or sisters, is the first aspect of a mom's life that is neglected and sacrificed when time and money are limited. She understands that these relationships grow from sharing experiences. In this economy, she has had to forgo those experiences, and she longs for them.

Opportunity: Create experiences for her to connect, relax and rejuvenate with the women in her life.

Public-Self: This aspect of a mom's life causes her to be self-conscious and aware of what other people think of her. This is her inner voice telling her that she must be perfect in order to be loved.

Opportunity: Marketers will reach moms if they communicate messages that help her look and feel good about herself within a budget.

Material-Self: A consensus among all moms is the recession is causing them to evaluate and reset their values.

Opportunity: Marketers should strive to capture the family's new ideals. Overt messages of accumulation and greed will not be attractive.

EXECUTIVE SUMMARY (CONT.)

The most prevalent theme is a mom's heightened focus and recommitment to experiences with the family.

WHAT'S OUT

DISPOSABLE LIVES

ACCUMULATING THINGS

IMMEDIATE SATISFACTION

EATING OUT

NEIMAN MARCUS

SUVS

CASINOS

PERSONAL TRAINERS

PRACTICALITY

CHARGE CARDS

WHAT'S IN

SUSTAINABLE LIVES

ACCUMULATING EXPERIENCES

PLANNING AHEAD

COOKING AT HOME

THRIFT STORES

BIKES

BOARD GAMES

WALKING THE DOG

FRUGALITY

COUPONS

METHODOLOGY

The research was gathered from an interactive, qualitative and in-depth social exploration among 17 middle-class moms. In order to understand their thoughts and feelings about how the recession has made an impact on them and their families, we determined that sufficient time and a series of projective assignments would be required.

<p>WHO THEY ARE</p> <p>Explored their lifestyles, families, interests, values and spending behaviors</p>	<p>THE ECONOMY</p> <p>Explored the economy and its impact through the lens of their families, values, feelings and life realities</p>	<p>CHANGES</p> <p>Explored the lifestyle and changes in spending patterns they have made, should make, might make and hope not to make</p>	<p>COMMUNICATIONS</p> <p>Explored their reaction to current advertising messages that directly or indirectly address the current economic and social climate</p>	<p>WRAPPING IT ALL UP</p> <p>A 45-minute telephone interview to dig deeper into each of their assignments</p>
<p>WEEK 1</p>	<p>WEEK 2</p>	<p>WEEK 3</p>	<p>WEEK 4</p>	<p>WEEK 5</p>

CATEGORY I – THE FAMILY-SELF

Research revealed there is no facet of a mom's life that is more rewarding than what she gets from and brings to family. This facet of her life also can be the most frustrating and exhausting. Yet, at the end of the day, once the kids have gone to bed, she is grateful for her good fortune. Right at the heart of the family self is where we find the recession to have had the most significant reset of values. **The study reveals that these moms hope that the economic shift has also resulted in an enduring cultural shift.** This is where her resilient nature came to surface.

MOM'S PARADIGM IS THAT THE ECONOMIC CLIMATE PRESENTS A REFINEMENT AND LEARNING OPPORTUNITY FOR HER FAMILY TO ACCUMULATE EXPERIENCES OF TOGETHERNESS OVER THE ACCUMULATION OF MATERIAL THINGS.

While children are at the center of her life, mom maintains her own distinct approach to parenting with the end goal to spend time together. She feels the need to teach, touch and interact with her family more than she did prior to the recession. Always taking into account internal and external influences, she will make her parenting decisions primarily by following her head, heart or her body. Although there is overlap, the mindset leans toward being pragmatic, emotional or task-oriented.

Opportunity:

Marketers speaking to this target audience would benefit from understanding the core values inherent in each approach, while keeping in mind that the togetherness factor cannot be diluted or dismissed. **Moms will best respond to messages of optimism and abundance over fear, scarcity and desperation.**

Effective marketing will capture the emotion of the family through interactive activities, such as cooking, gathering of heirlooms and vacations based on memorable experiences.

CATEGORY I – THE FAMILY-SELF



These optimistic women get joy and satisfaction from their family. This video montage made from their own collages communicate their feelings about family.

CATEGORY II – THE WORK-SELF

In exploring the value work brings into the life of a middle-class mom, research indicates that feelings and attitudes toward work significantly vary depending on the job itself and the level of financial responsibility to the family. What mom personally gains from work, beyond bringing a paycheck home, ranges from stress and frustration to a sense of creative expression, appreciation and motivation.

Despite the country's record-high unemployment, mom doesn't feel at risk. She is realistic about the stress inherent with work/life balance, yet she chooses to remain optimistic. **Consistent with mom's family-self, her resilient spirit surfaces as she is particularly drawn to messages that communicate a strong work ethic and draw humor from feelings of frustration.**

SHE HAS A CONVICTION THAT AS A COUNTRY, WE WILL BEGIN TO TAKE RESPONSIBILITY FOR OUR ACTIONS AND ITS EFFECT ON THE ECONOMY. SHE BELIEVES IT IS WITHIN OUR POWER TO TURN THINGS AROUND.

According to the Center for Women's Business Research, approximately four million women-owned businesses have opened since 2002. These numbers are a strong indicator of the positive and resourceful nature inherent in women. They take a driven approach to the future encouraged by the choices available to them.

Opportunity:

Marketing that appeals to the work aspect of this target audience must acknowledge her positive and resourceful attitude. Messaging that conveys an appeal to her strong work ethic, creativity and work/life balance over bold messages of get-rich monetary gain is an approach that will resonate with moms who assume the future will only get better.

CATEGORY II – THE WORK-SELF



Even when things are bad, these women look to the future resolute that it will get better. This video montage made from their own collages communicate their feelings about work.

CATEGORY III – THE SOCIAL-SELF

Of all facets studied in the lives of these women, mom feels most deprived and restricted in her social-self. It is through her social-self that she seeks rejuvenation by getting away, relaxing and spending time with other women. She feels that the reciprocal nurturing from other women is where her emotional well-being is fueled, and this honest exchange allows her to accept and forgive her weaknesses.



“Me in the future.”
Debbie, Denver, CO

Unique to female relationships, spending time with other women laughing, talking and expressing vulnerabilities allows mom to feel free, understood and unrestrained.

Nevertheless, the social-self is the first aspect of her life neglected when time and money are limited. This aspect of mom’s life has been put on the back burner.

It should come as no surprise that during the past six months of this recession, 53 percent of women polled in a recent study by Global Strategy Group said they have decreased spending at restaurants, 59 percent noted a decrease in travel spending, and 55 percent have cut their overall entertainment spending.

MOMS, ALBEIT SUBCONSCIOUSLY AT TIMES, ARE MAKING THE CHOICE TO SPEND LESS ON THEMSELVES BY SUBSTITUTING FAVORED BRANDS FOR LESS EXPENSIVE ALTERNATIVES, SUCH AS OVER-THE-COUNTER BEAUTY PRODUCTS.

When it comes to apparel and travel, she will instinctively choose to go without in exchange for purchasing apparel for her children, and the once-popular “girl trips” have significantly decreased, as has the “girls’ night-out.”

“My greatest investments are my individual relationship accounts.”
Sue, Denver, CO

CATEGORY III – THE SOCIAL-SELF



Our study reveals that the social self is fueled by experiences. She understands that for her social relationships to grow they need to be nurtured. This video montage made from their own collages communicate their feelings about social experiences.

CATEGORY III – THE SOCIAL-SELF (Cont.)

Opportunity:

Mom is making temporary sacrifices now, but as the economy improves, she will reward herself for riding out the storm by pampering herself with those things she did without. This is a time when she will reevaluate products, services and experiences to determine if she will stick with them or if she will go back to familiar luxuries she has missed.

The major distinction between her needs versus her wants during this temporary period will drive her choices in the future. If she has had to sacrifice certain products, services or experiences simply to get by, she will likely seek more appealing options when she is more in control of her choices.

CATEGORY IV – THE PUBLIC-SELF

A mom sees her value and place in the world through her public-self. This is a reflection of herself as seen through the eyes of those around her. Her public-self feeds her insecurities and makes her most self-conscious, critical and aware of what others think. It is her inner voice that convinces her that she must look perfect and appear to have everything under control.



This picture represents me being invisible, which makes my public-self easier at times.”

Debbie, Denver, CO

This introspective aspect is based on appearances, which, when time and money are scarce, makes perceived perfection even more difficult to uphold.

Moms will continue to judge themselves through the eyes of others with a keen understanding that her best self is displayed by being actively engaged with her family and looking vibrant.

Opportunity:

Marketers must strike a correct balance between messages that convey youthfulness and beauty without coming across as superficial and materialistic. **This is a prime opportunity for less known challenger brands to put a stake in the ground with this audience by aligning themselves with mom’s values.**

CATEGORY V – THE MATERIAL-SELF

While she had different orientations to money, one thing held true with all moms studied: the recession has caused her to evaluate and reset her values. These values are the guiding principles of their purchasing decisions now and in the future.

Looking back at past purchases, mom revealed the following:

BEST THINGS THEY EVER SPENT MONEY ON:

- **PEOPLE**
- **THINGS THAT BRINGS PEOPLE TOGETHER**
- **EXPERIENCES AND MEMORIES**
- **THINGS THAT HELP THEM TAKE CARE OF THEMSELVES**
- **EDUCATION**
- **FREEDOM AND MOBILITY**
- **SECURITY AND THE HOME**

ITEMS THEY REGRET BUYING ARE THINGS THAT:

- **CAUSE KIDS TO ISOLATE**
- **THEY DON'T USE**
- **DON'T FIT**
- **SEND THE WRONG MESSAGE**
- **ARE OF POOR QUALITY**
- **COST MORE THAN THEY ARE WORTH**
- **CAUSED THEM TO LOSE MONEY**

“The furniture you buy today will not last one lifetime, let alone become a heirloom. I even get a sense that humanity has become disposable: Friends, employees, co-workers are all replaceable”

Andrea, Braintree, MA

Opportunity:

Marketers addressing middle-class moms should take into account what she believes to be part of the old regime, as opposed to new values that she will use as guiding principles for herself and her family.

CATEGORY V – THE MATERIAL-SELF



This video montage reveals the inner struggle these moms feel between needing and wanting of material things when factoring in the importance of love and family.

SUMMARY

The overriding conclusion from *Middle-Class Moms & the Recession* is that unprecedented change, unlike any experienced since the Great Depression, is taking place as a result of this recession. This fundamental shift in values will not only affect the family of today, but will continue to influence consumer attitudes and purchasing practices for the foreseeable future.

ABOUT E.B. LANE

Established in 1962, E.B. Lane is one of the Southwest's largest full-service advertising, interactive and public relations agencies with annual capitalized billings of more than \$65 million. We have decades of proven research practices, yet continually seek the most current and effective techniques for an ever-changing consumer environment.

With this in mind, E.B. Lane partnered with SenseTruth, www.SenseTruth.com, based on our standard to conduct research methodology that unearths emotional truths far beyond insights that surface from traditional methods of staged focus groups. It is not enough for us to merely gather statistics; we conduct psychological evaluation that reveals emotions far beyond the norm.

Built on a strong foundation of consumer marketing experience with national brands such as Walmart, Washington Post subsidiary Cable One and the Arizona Super Bowl, E.B. Lane is an agency team of seasoned marketing experts who are proud to share with you insights from *Middle-Class Moms & the Recession*.

ABOUT SenseTruth

SenseTruth specializes in qualitative and observational research designed to reveal those aspects of belief and behavior that are most true. We're experienced in all forms of qualitative research and chances are, we'll recommend a mix of approaches. This makes things more interesting, tackles the problem from various angles, and gives you more opportunities to find the most powerful truths.

Account Planner: Tamara Thompson

Making things make sense is at the root of everything Tamara does. She brings this passion to her company and her life. Most importantly, she brings the spirit to the companies she helps shape and consumers she seeks to understand.

Tamara loves understanding why people do what they do and how products, brands and media can be a meaningful part of their world. She's worked on significant socio-cultural explorations, including a futurist project for United Airlines identifying the forces of change, an assignment for Motorola exploring the human-technology connection, an immersion into the new meaning of luxury for Lexus, and how the recession is affecting (emotionally, financially, and practically) middle-class moms for E.B. Lane.

SenseTruth is the evolution of Tamara Thompson Consulting, a research and brand consultancy in operation since 1999. Prior to striking out on her own, she spent 10 years in the world of advertising. She began her advertising career at Chiat/Day and completed it as SVP, Director of Strategic Planning at BBDO West.

Tamara's greatest passion is her young son, Roark. Her varied interests include economics, philosophy, politics and the social experience of online gaming. She feeds her need to get the whole story through an addiction to C-SPAN.



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