

# Eyes Wide Open

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*Wallet Half Shut*

The Emerging Post-Recession  
Consumer Consciousness

  
communispace™

*agility*

**FORECLOSURE  
FREE-FOR-ALL**

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1 in 4 (23%) borrowers are under water (i.e., they owe more than their home is worth)

*The Wall Street Journal, November, 2009<sup>1</sup>*

We are getting paid less,  
not more

Middle-class families earned less by the end of  
2008 than they did in 1999  
*The New York Times, January, 2010<sup>2</sup>*

**SALARIES AND  
PAYCHECKS  
IN REVERSE**

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AMERICANS ARE LIVING THROUGH one of the biggest economic crises of our time. Everyday life has become harder to manage and as a country, we have faced unprecedented challenges.

**UNPRECEDENTED  
UNEMPLOYMENT**

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For the first time since the Great Depression U.S. unemployment rates have exceeded 20%

10.0% “Official Unemployment”  
*The New York Times, December, 2009<sup>3</sup>*

17.5% Real Unemployment  
*The New York Times, November, 2009<sup>4</sup>*

22.1% SGS Unemployment  
*ShadowStats.com, November, 2009<sup>5</sup>*

## **JOB DISSATISFACTION**

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We are not always  
happily employed

64% of workers under 25 years of age are unhappy with their jobs  
and less than half of all Americans are happy with their jobs

*The Associated Press, January, 2010<sup>6</sup>*

We are saving more,  
despite smaller salaries

**SHIFTING INTO  
SAVINGS**

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In May 2009, real personal income fell -2%, while  
savings increased more than +6% (year over year)

*The Wall Street Journal, August, 2009<sup>7</sup>*

This crisis has taken a toll on our emotional as well as our financial well-being. Consumers are sitting right in the middle of this disequilibrium and have been forced to reflect on, react, and change to this new reality.

## **DEPRESSION ON THE RISE**

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More of us are medicating to  
combat depression

Prescriptions for sleeping pills rose  
+7% and +15% for antidepressants

*AdAge, March 4, 2009<sup>8</sup>*

42% of those 25 and younger who are unemployed feel  
their life lacks direction; and of young unemployed,  
one-third (32%) felt depressed all or most of the time

*PersonnelToday.com, January, 2010<sup>9</sup>*

*Where do we go  
from here?*

Good question.

THERE IS SO MUCH information about how the recession has hurt the consumer. But what happens now? As we embark on a recovery, we feel compelled to know how the experience has shaped the lives of everyday Americans.

As thought leaders and experts in understanding consumer behavior in the context of our culture, Ogilvy and Communispace teamed up to make sense of the effects the recession has, and will have, on Americans. In this study, we attempted to answer some important questions by surveying 1,200 U.S. consumers and qualitatively exploring key topics with 694 online community members.

- How are consumers emerging from the recession?
- What changes are they making and will they make in the short-term? Long-term?
- What will post-recession consumers want, need, desire?
- How will they prioritize spending their time and money?
- How can marketers and brands stay relevant as they navigate this new landscape?
- Are there any notable differences when looking at generations, gender, or geography?

**The end result will provide clarity and direction for staying relevant with the post-recession consumer.**

A solid red square graphic is positioned on the left side of the page. It contains the text "Our Thesis" in white, serif font, centered within the square.

Our Thesis

Eyes Wide Open  
*Wallet Half Shut*

IT IS AN UNDENIABLE FACT: The recession has created not only a universal sense of anxiety and fear, but a greater level of consciousness across all ages and genders. We can't go back. We have heightened our perception; we are awake, alert, aware—whether we like it or not.

Our research shows this new consumer consciousness is occurring for all Americans to some degree or another—regardless of age, gender, geography, education, or income. So while this new awareness is something we all share, what people do with this awareness is as diverse as the individuals who make up this country. The choices we are making are definitely more deliberate, but the exact decisions we make are personal, context-dependent, and relative to the day or the state of our lives and mindsets at any given moment.

What is the new  
consumer  
consciousness?





AMERICANS ARE LOOKING AT THEIR WORLD through a new lens. This post-recession consciousness has created a set of values and priorities with which to build a different reality. For many, the recession has brought newfound clarity and has helped to align choices with values.

Greater  
consciousness =  
Greater  
personal clarity

Consistency  
in the  
inconsistency

We believe this new consciousness is not easy to define—we can't place people in buckets. From the outside in, post-recession consumer behavior might seem inconsistent. But the decision-making that underlies people's choices is born of hard-won experience; choices, whatever they may be, are deliberate and intentional.

For marketers this is going to mean consumers are going to look before they leap into purchase decisions with more research before they buy, more label reading, comparison shopping, talking to friends, etc. This was already happening before the recession, with increased access to information and the explosion of social media; the recession will just propel this trend forward as consumers look before they leap.

## Divergent coping paths driven out of our desire to regain equilibrium

WE EXIST IN A NEW CONTEXT with greater ambiguity, uncertainty, and disequilibrium. If we think of reality dynamically, as a system, then consumers' inconsistent behavior—purchasing a flat screen TV on one day, but packing bag lunches every day for work—begins to make sense. When we are in disequilibrium there are two possible reactions: We can push back on the external pressure to change or re-balance the system on an incremental level (like making coffee at home vs. stopping at Starbucks on the way to work); or we can fundamentally reorganize our behavior to create a new balance (e.g., opting out of a high octane job for improved quality of life).

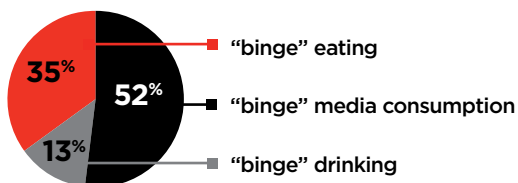


We see Americans moving between two choices to manage their lives. Sometimes they chose to “re-trench”—shifting habits, spending patterns, rituals, and priorities to maintain the status quo. At other times they have been able to “re-imagine” their lives, creating whole new systems of values and behaviors.

## Re-trenching: Into the recliner with the remote

For example, one of the things we are seeing, despite an undeniable explosion in the digital and social media space, is the return of good old-fashioned television viewing. Once deemed the opiate of the masses, it seems to be taking back its place as the entertainment “drug of choice”—helping us regain a sense of calm and mindless relief in the midst of all this craziness.

When we asked consumers to tell us how they were coping with the recession and what they were most likely to binge on between alcohol, food, or television, media was the clear choice:



And according to Deloitte’s State of the Media Democracy Survey<sup>10</sup>:

- “26% more Americans chose TV as their favorite type of media than they did last year.”
- “More than 70% of respondents ranked TV among their top-three favorite media activities” and “34% placed it at the top of the list.”
- “Consumers watch nearly 18 hours of television in a typical week—up from less than 16 hours last year. Millennials (ages 14–26) had the largest increase, to almost 15 hours from 10.5 hours.”

### Alex and Seth use media as an escape, as a connection to the world, and as a relatively inexpensive form of entertainment...

“I refuse to give up cable TV because while I’m watching TV from home, I’m not out spending more money!”

ALEX, 33, WASHINGTON

“Watching TV and videos online lets me catch up with the world outside of my daily bubble, and is a great way to escape as well.”

SETH, 21, MASSACHUSETTS

## Re-imagining: Paving new career paths

We are also seeing people transforming old behaviors and attitudes. As pre-recession habits and choices become untenable, people are discovering new ways to explore the world, appreciate their lives, and to reconnect with values. Forging new career paths out of choice, necessity, or some combination of both is a prime example of re-imagining behavior.

### Theresa has re-focused on volunteering and her values after losing her job...

“...having lost my job as a result of the recession I have had the opportunity to volunteer with a couple of organizations to explore future career choices...Living on less money is a valuable lesson which may help me manage money better in the future and has helped me learn to be creative in many ways...”

THERESA, 49, MASSACHUSETTS

### Bruce has ratcheted down his career for a better overall quality of life...

“I retired from my full-time job that I hated almost every day of the week and started a part-time job that is much closer to home. In the process I threw out my bosses (plural) and threw out hundreds of commuting hours. I am happier collecting Social Security and sleep much better now.”

BRUCE, 66, PENNSYLVANIA

### Secondary research suggests re-imagining careers is a national trend.

- As more adults are going back to school in the recession, enrollment in health care and work force development programs at San Diego State University are up more than 40% from 2007.<sup>11</sup>
- 28% of community colleges reported enrollment increases of more than 10% from January 2008 to January 2009.<sup>12</sup>
- Ph.D. applications have increased by 16% at Northwestern, 7% at Michigan, 8% at Dartmouth, and 12% at Johns Hopkins. Overall applications for graduate study—most of which are for Ph.D.s—are up by 15% at Duke, 9% at Dartmouth, 5% at Stanford, 9% at Yale, and 9.5% at Princeton, according to deans at those universities.<sup>13</sup>



AT ANY GIVEN TIME (within a month, week, or even a day) any one person could be re-trenching or re-imagining some aspect of their life. What brands and marketers need to know is that the choices consumers are making are deliberate ones. Consumers may choose to spend, save, or postpone a decision with the goal of either holding on to the status quo or creatively inventing new ways to spend their time and money. In this post-recession reality we have moved from choices that were relatively passive, carefree, and simple, to ones that are more active, deliberate, and complex...

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## THEN

Passive  
Careless  
Simple

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## NOW

Active  
Deliberate  
Complex

---

Deliberately  
headed in  
new directions

### **Kim has actively shifted how her family uses media for entertainment...**

“As a family, we cut back on going to the movies and even renting movies. To make up for this, I have been actively borrowing movies from the library. Every morning I check their RSS feed of new DVDs added to the collection and get on the waiting list. Sometimes I’m lucky and I’m one of the first to get on the list.”

KIM, 38, OHIO

### **Tina has sought product options that meet her increasingly complex needs—“high-end” experience, sustainable, and (now) relatively inexpensive as well...**

“I used to enjoy high-end bath and body goodies from companies that I felt took environmental and labor concerns seriously in the making and selling of their products (from start to finish). I’ve since looked for and found the same high-caliber of responsible companies with great end-products, but that are much more scaled down and as such, affordable (like Trader Joe’s).”

TINA, 25, CALIFORNIA

### **Maria has taken stock of her situation and recognizes the need to make more deliberate choices...**

“I have tons of STUFF around my house to remind me of all the stupid things I have spent money on over the years. Oh, how I wish I had that \$50 now instead of that rug shaped like a dog’s head, for example... I would take some photos of my JUNQUE as a reminder of the conspicuous consumption of my past (when I had a job). The person I am today is the same who used to use coupons and shop sales, only these days there are no splurges.”

MARIA, 42, CALIFORNIA



Eyes Wide Open  
*Wallet Half Shut*

INSIGHTS

## INSIGHT #1:

# “It’s not me...it’s you.”

FOR ALL THE NEWS REPORTS of high anxiety and far-reaching impact of the recession, most Americans are acknowledging that life has changed, but tend to project both the stresses of the recession as well as the blame for the crisis on others.

The general feeling is this recession is largely someone else’s problem and someone else’s fault and that “I’m fine and the rest of you are a mess.”

This may be a bit how Americans want to see things and not exactly the reality, but it is interesting how Americans downplay or distance themselves from this recession and like to see themselves as strong and capable in the midst of all this economic dysfunction.





You're really stressed, *I'm not*

Thinking about the recent recession and the current state of the U.S. economy, how would you rate the general public's and your own level of economic anxiety?

YOU

67%

say the general public's level of economic anxiety is "high" or "through the roof"

ME

40%

say their own personal level of economic anxiety is "high" or "through the roof"

You won't learn from this, *I will*

As soon as this recession is over, who will go back to spending like they did before?

62%

say the general public will go back to spending like they did before

21%

say they will personally go back to spending like they did before

You needed this wake-up call, *I didn't*

Overall, do you think the recession has been a positive wake-up call for the country and/or you personally?

36%

say it has been a positive wake-up call for the country

17%

say it has been a positive wake-up call for me personally

You need to change, *I don't*

In general, I think that I/Americans consume too much and I hope the recession will permanently change my own/our spending habits for the better.

84%

say Americans over-consumed and need to improve their spending habits

17%

say they personally over-consumed and need to improve their spending habits

"I think one of the biggest problems that we faced as a country was that people were encouraged by companies to spend, spend, spend, and when money started to run short, people realized they were in trouble. It may sound awful, but it made me feel better about my spending habits. Even though we are supposedly in a recovery, I don't intend to change my spending habits, as they've worked for me before, and through a recession."

NATHAN, 25, MAINE



## YOU GOT US INTO THIS MESS, I will get us out of it.

When it comes to who's at fault for this economic mess we're in, the blame lands squarely on the government and the banks. Consumers, despite all the over-spending, over-extended mortgages, and debt, do not see themselves as to blame. However, our study shows that consumers do see themselves as the ones who will actually get us out of this mess.

We asked people who they would blame—banks/financial institutions, the U.S. Government, or other consumers—for the recession. The findings were very clear that, although government and the banking industry bore the brunt of the blame, Americans would rely on themselves to get the country back on track.

If you were forced to blame the banks/financial institutions, the U.S. government or consumers for the recession, who would you choose?



45%

U.S. Government

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43%

Banks/Financial Institutions

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12%

Consumers

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Who do you think has the best chance of getting us out of this mess?



56%

Consumers

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33%

U.S. Government

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11%

Banks/Financial Institutions

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## INSIGHT #2:

“Love all, trust a few,  
do wrong to none.”

*Shakespeare*

AS THE BLAME FLIES and the worries escalate, Americans have become hyper-vigilant about who they can rely on and trust. It's not big business, it's not the government, and surprisingly, our study shows it's not the media or other Americans.

When we listen to the stories consumers told about their experiences, it becomes clear that the circle of trust has shrunk to include that which is close, tangible, and personal.

### Distance abounds

One theme that emerges from this study is that, along with distrusted institutions (big business, the banks, and the government), Americans have heightened their distrust of the media and, most interestingly, other Americans.

### The media can't be trusted

“I think we've been led further into our recession by analysts and media...a self fulfilling prophecy.”

ERIC, 33, ILLINOIS

### Neither can we trust other Americans

“There is very little consequence for people who misuse and abuse their finances...What gets me is that some people aren't satisfied with driving a Honda or Saturn, they 'HAVE TO HAVE' a Lexus or BMW.”

THERESA, 45, PENNSYLVANIA

# Above all, trust what you know and can see

Along with an eroding trust in “other” consumers and established institutions like banks, the government, and even the media, American consumers are reconnecting with what they can see and feel that is local and tangible—themselves, their family, and their community.

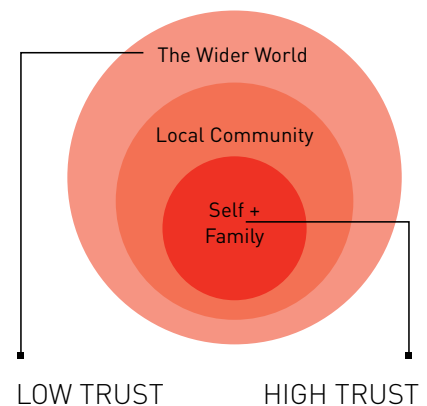
For example, when we asked consumers what made them most upset about the recession, *government giving bailouts to*

*banks (58%) and the failure to adequately support “Main Street” were the most frequent answers.* And while statements made by the government were viewed as the least trustworthy means for gauging recovery (only 16% said they relied on these), *consumers indicated that local business—Main Street—was the most important indicator for them to pay attention to (49%).*

## The ever-shrinking circle of trust

The American public’s abstract distrust of institutions has been documented—and on marketers’ radar screens—for a decade or more. However, the current recession (and in particular the way it has been reported in the news) has widened the “circle of distrust” to include the media and also other Americans (those who over-consumed to the detriment of everyone else).

Indeed, family may be the last reliable institution—the people who will always be there for you, not only but especially in hard times. Dependence on family is seen as a strength, not a weakness. And while they recognize that Americans all over are suffering, people are much more engaged with what is going on in their own backyards (e.g., foreclosures, local businesses, unemployment) than what is being reported on the news or the state of the stock market.



## Local gets personal

The stories American consumers told us show that the recession has helped them re-imagine their connection to family, friends, and the local community.

**ELIZABETH (24, NEW YORK)** has rediscovered and reconnected with her local community:



“I also enjoy ‘traveling’ to other neighborhoods in my city because it satisfies my curiosity for new places and people, it enriches my day-to-day life and gives it more variety and fun, it makes me feel more connected to the area I live in and the people I pass on the street every day, and all for little to no extra money.”

**KASSANDRA (38, TEXAS)** uses potluck dinners as an inexpensive way to stay connected with friends and neighbors:



“One family hosts each month and they provide the main entree then each family brings a side dish. The kids are invited and they all get together and play while the adults enjoy some quality grown-up time together...It’s an inexpensive way to spend time with friends and loved ones.”

So we have seen a steady and undeniable shift to trusting those close to you and an increased lack of trust in institutions and corporate entities that consumers can’t always understand, aren’t transparent, and definitely don’t have their best interests in mind. Brands and marketers need to understand this and look for ways to be transparent and tangible. Consumers want to truly see brands speaking to them and being part of their world and community in order to build trust and affinity.

INSIGHT #3:

# Self Reliance is the new insurance policy.

LACK OF TRUST and disgust with institutions

Americans need to be strong, “get their house in order,” and protect themselves.



## An opportunity to change habits and rethink values

Despite the economic stresses and disequilibrium brought on by the recession, Americans are feeling good about emerging with more responsible spending habits, better values, and a fresh perspective on life.

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**When asked if they thought the way in which the recession has changed the way they spend their money is ultimately a good thing.**

**78%** believe the recession has changed their spending habits for the better.

**69%** of consumers agree the recession has caused them to rethink their perspective and/or values.

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“Don’t forget the ‘mindless’ in mindless spending. Remember that the joy of buying is so fleeting and the satisfaction of saving for a vacation, education and retirement are more important...Remember that all that time you spent shopping was retrieved and put to better use; use that made you feel more uplifted, a better person and a person who could devote more time to relationship building. The recession forced you to rethink priorities and created a more rounded, satisfying life.”

ELLE, 41, DELAWARE

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## OCCASION FOR PERSONAL EPIPHANIES

Americans have developed a new strength—planning, analyzing, and delaying gratification—that has become part of who they are in the post-recession reality. When we listen to consumers talk about what they have learned, we hear that the recession has been a source of personal epiphanies; people have discovered what they are made of, there is a hint of pride in their stories, and they appreciate their new-found confidence.

“I’ve had to break out the trusty calculator to figure out and follow my daily expenses more closely, figure out my college loan repayments, and for long-term plans I have.”

DANIEL, 23, NEW JERSEY

## When all else fails, your failure is not an option

‘You are your best insurance policy’ is the mantra for today. We asked consumers to write an “open letter” to their future selves 10 years from now, describing the ways in which their lives have changed for better—and for the worse—because of the recession. We certainly heard stories of blame and recrimination, but we also heard stories about new-found confidence, the development of healthier habits, and a heightened awareness of how important it is to be able to rely on your self.

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## NOTE TO SELF



“Develop your independence so you can rely on yourself and make your own decisions. Prepare for the future, but live for today. Embrace change with your eyes wide open. Not all change is good, so always have a plan B.”

VALERIE, 58, OHIO



“Never let anyone or anything stop you from realizing your dreams. Never let fear control your life. And never let the economy, the government or anyone else determine your life and destiny.”

THOMAS, 50, MICHIGAN



“During the recession of ’09, you had a toddler and a teen, calculated down to the nickel purchases at the store, saved meals out with the family as a monthly treat, canceled the extras including delivery of the newspaper. All of this changed you. Not into a bitter person, but a person who looked at life with ‘fresh eyes.’”

LPIKA, 38, FLORIDA

INSIGHT #4:

# Everything is deliberate.

THE DAYS OF BEING able to spend freely without a care are over. Our heads are permanently out of the sand—we are awake and aware whether we like it or not.

That sober awareness has led to today's consumers becoming uber-aware of how their choices impact their lives and community on a day-to-day basis.

But popular opinion would lead us to believe the recession has caused all Americans to be more frugal; that is only half the story. While consumers are more mindful of cost and value, they are also craving a reward for their new-found consciousness and responsibility. What that means is treats and splurges still exist.





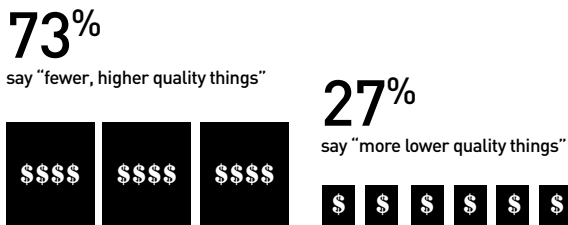
## Deliberate ≠ Frugal

Today's consumers can make deliberate choices on different ends of the spectrum. On some days they may choose to reuse clothes already in their closets, but they may also selectively give themselves permission to shop "mindlessly" for two hours at a high-end mall as a treat, to reassert their identities, or as a temporary escape.

MINDLESS	◀▶	MINDFUL
SPLURGE	◀▶	SACRIFICE
EXTRAVAGANT	◀▶	FRUGAL
OPTING OUT	◀▶	TRADING DOWN

## Quality is still in

When we asked Americans if they would rather have fewer, higher quality things or more, lower quality things, they clearly favored quality over quantity.



Rather than unilaterally eliminating all frivolous expenses from their budgets, consumers are holding on to and keeping up with those activities, experiences, and products that allow them to tap into their passions and joys:

"I refuse to stop buying expensive linen for my bath and bed because I love the way they make me feel..."

CHRISTINA, 55, ALABAMA

"By reducing the times we eat out and go to the movies, we can still go out to one decent sit down a month but are saving \$50-\$100 per month."

TERESA, 35, INDIANA

## Signs of Extravagance

We know consumers haven't stopped spending, even on things that many of us see as unnecessary extravagances.



For example, Apple posted **47%** profit growth in Q4 2009.<sup>14</sup>



Another upscale success in 2009 was P.F. Chang's, a high-end restaurant chain, who saw profits increase **38%** from Q1 of 2008.<sup>15</sup>



And, on the luxury end of the spectrum Hermès has fared very well. "The French-based company's sales rose **3.2%** to \$603 million over the first three months of the year. Much of that growth is attributed to sales of leather goods, which rose **21.7%** to \$287 million."<sup>16</sup>

## But quantity (and value) are as in as ever

However, when we asked specifically about how their shopping habits had changed, the vast majority of people said they had turned to private label, upped their use of coupons, and frequented discount stores:



"I've been buying more things in bulk and storing them in the basement. Paper products and cleaning supplies are my main focus; with frozen foods and baking supplies coming in second."

JAY, 22, PENNSYLVANIA

"I am tossing brand names that I used to spend money on, such as Downy fabric softener when I can buy a much cheaper no name bottle for much less..."

CAMILLE, 48, MASSACHUSETTS

While we see many brands and marketers jumping on the value bandwagon, there is still opportunity at the higher-cost, higher-quality end of the market. However, when competing for consumer dollars, the competitive set is much broader and often in different categories. And while value is always welcome, it can't seem like a compromise on quality or an exercise in deprivation.

INSIGHT #5:

# It's Complicated.

THERE IS NO SINGLE FORMULA for coping in a post-recession world. With so many choices being made every day, personal context and attitudes change daily. If marketers try to predict or assume a certain consumer response to the recession, they are in danger of being wrong.



# Making it work: Shiftable habits

Rather than giving up favorite addictions people are re-trenching; learning how to shift their behavior to keep their habits. We asked consumers to identify those behaviors, products, and services they would permanently “throw into the garbage can” based on their experience of the recession. We found that daily coffee habits and access to all forms of media proved to be two areas that were particularly “shift-able”—too important to relinquish completely (they were viewed as much needed treats or lifelines), but moveable in that there were options for consolidation or do-it-yourself.

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## THE COFFEE CONUNDRUM

WHAT SACRIFICES DO I NEED TO MAKE TO KEEP MY MORNING JOE?



### Personal paths to a feel-good buzz

“Starbucks is my treat and keeps me awake when I am driving for several hours. I refuse to give it up!”

MARY, 59, NEBRASKA

“I have started to skip coffee from Starbucks during the week so that I can treat myself on Fridays.”

KRISTY, 35, KANSAS

“I have started brewing coffee at home instead of going to Starbucks at least 4 work days a week.”

JERRY, 55, NEW JERSEY

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## DIGITAL DOWN-GRADING

WHAT ARE THE “MUST HAVES” I NEED TO STAY CONNECTED?



### Streamlining the media connection

“I have stopped using the internet on my phone so that I can get a lower rate plan and utilize a better device—my laptop.”

MARK, 27, TEXAS

“I switched my cell phone plan to a pre-pay and there is no way I would ever go back! The monthly plan was a total rip-off for someone like me who doesn’t use their phone a ton.”

RACHEL, 43, COLORADO

“I refuse to cancel my cable subscription; I need Internet connection and down time with the TV.”

LEANN, 38, OHIO

# Vices and Virtues living in harmony.



ONE THING WE WERE interested in exploring was the coping strategies Americans were engaging in order to deal with the effects of the recession. Were they driven to the dark side or did they find themselves seeking out goodness and light?

Americans are working both sides of the virtue/vice continuum.

On the dark side, we see Americans getting angrier and lazier, kicking up wrath and sloth. However, pride and gluttony are getting kicked out. Pride is an obvious vice, getting kicked out as many Americans express how the recession has been a truly humbling experience.

## KICKING UP OR KICKING OUT

We asked consumers which of the “deadly sins” they had either kicked up or kicked out during this recession. For those that indicated they had changed their habits in either direction wrath, sloth, and lust were the sins most frequently kicked up. The sins of greed, gluttony, and pride were kicked out the most.

	KICKED UP	KICKED OUT
WRATH	60%	40%
SLOTH	55%	45%
LUST	54%	46%
ENVY	42%	58%
GREED	39%	61%
GLUTTONY	34%	66%
PRIDE	27%	73%

## MONEY/FOOD CONSUMPTION CORRELATION

Gluttony being kicked out by many is an interesting phenomenon. While there are plenty of Americans drowning themselves in food to comfort them in this time of crisis, many Americans we’ve talked to are using this recession as not only a financial wake-up call, but a general wake-up call to get their lives in order. For example:

SANDY (50, MARYLAND) cut back on meals out in an effort to be frugal, and in doing so, helped encourage a healthier lifestyle for her entire family:



“I believe we are eating healthier. I have lost 10 pounds and my husband 15 since we started this...I feel I am taking better care of my family by eating healthier, more nutritious meals at home.”

For JASON (35, MISSOURI), the recession served as catalyst for a complete lifestyle re-vamp, with an increased focus on exercise and healthy eating:



“Been smoke-free for 10 months. Also, I’ve ditched the red meat and gone primarily to fish, veggies, and fruits. For a form of cheap entertainment and to contribute to my newfound health kick, I purchased some Asics running shoes...I’m really proud of the healthy lifestyle I’m now living and just wished I would’ve started several years sooner!”

Given that America is more overweight than ever, this drive to more conscious living and deliberate choices highly correlates to choosing what goes into our mouths more carefully.

## KINDNESS FOR A CRUEL WORLD

The good thing is that it looks like Americans are responding to the recession with an extra dose of kindness.

KINDNESS **90%**  
of people that have changed their habits have chosen to KICK UP kindness.

Kindness, good works, and charity—much like trust—are most meaningful when they happen at a local level and in tangible ways. For example, although charity is the virtue people say they are kicking out the most...

CHARITY **35%**  
of people that have changed their habits have chosen to KICK OUT charity.

...the stories consumers tell suggest that Americans are still striving to make a difference in their immediate communities.



“What I do to improve other people’s lives is that I spend a day or two in the local stores playing coupon fairy. I take all my coupons and make sure I distribute at least 25 a week to store shelves, I just slip them next to the product they are for. I hope the savings helps someone who is in need. I feel so good the whole week sometimes I go out and do it an extra day if I have enough coupons.”

STARR, 42, ARIZONA

We also found that first-hand experience with economic hardship positively affects kind or charitable actions:



Individuals who have lost their job, or know someone close to them that has, have kicked up every virtue more than those who don’t know anyone who has lost their job in the recession.

## MINDFUL WITH MORE THAN MONEY



It is important for marketers to remember that mindful living sparked by the recession isn’t always about spending money more wisely; it is about making conscious and deliberate decisions about all we do.

INSIGHT #7:

# Longing for lost spontaneity.

WHILE CONSUMERS HAVE SEEN positive changes and new opportunities emerge from the recession, they also admit it's exhausting to maintain the balance.

They are longing for permission to splurge and be spontaneous again.



## PUTTING RECKLESSNESS ON THE TO-DO LIST

Americans are seeking a break from “economic exhaustion,” and definitely long to be more indulgent and free. According to AdWeek, the urge to splurge remains despite hard economic times.<sup>17</sup>

**60%**

of females say that despite the recession they have “bought something on a whim” in the last year

**39%**

of females say they have made at least one impulse purchase in the past month

Our findings support this conclusion; many consumers we listened to said they are still splurging and doing what they can to escape, they are just being more thoughtful about their carelessness.

### TREND SPOTTER

We call this an emergence of “conscious recklessness.” Two things that don’t normally go together, but we see evidence that this is a new trend.

So instead of an impromptu shopping spree, we see Americans deliberately staying home and not even going into stores to avoid the all-too-common extra purchases that end up in the cart. They do this to save up for a Saturday when they venture into the stores knowing and planning for the “reckless” and “frivolous” impulse items.

#### What I miss...

When we asked consumers about their experience, they told us they were wistful for an “off switch.” Being resourceful and self-reliant may have its intrinsic and financial rewards, but it is hard work. Americans are pooped! They are tired of analyzing every purchase and weighing benefits and drawbacks.

“The one thing I miss is NOT worrying about spending a little extra on things we want, but don’t really need...I think having that flexibility back will be like breathing a sigh of relief.”

TOM, 40, VIRGINIA

“What I miss is being able to be more carefree in my shopping, to splurge on the occasional goodie (even little things, like smoked salmon at the grocery store, or the extra fancy shampoo...) without this nagging sense of peril...the act of using money carries much more anxiety than it used to.”

ABI, 39, NEW JERSEY

## LOOK BEFORE YOU LEAP

One way we see this loss of spontaneity manifested is in the amount of research and time Americans are spending before making a purchase. Given the recession:

**47%**

of Americans are spending more time researching items before buying<sup>18</sup>

Many consumers are delaying making big purchases...

“I can’t wait to stop feeling anxious and stressed about finances and the future...I need a newer car to replace mine that is 13 years old and on it’s last leg...we have also neglected any maintenance on our house and it is looking quite run-down.”

JUDY, 50, WISCONSIN

## “LUXURY”: BECOMING CONSUMERS’ DELIBERATE SPLURGE OR ESCAPE

This could be a great time to be a luxury brand/service—the go-to splurge consumers plan on; the escape they seek in their conscious recklessness...



“I refuse to stop buying Chai tea for home, it is my one luxury.”

BRUCE, 49, RHODE ISLAND



“I have stopped personal shopping so that I can splurge on vacation.”

YVONNE, 45, INDIANA



“I have started to clip more coupons so that I can buy luxury goods on occasion...”

JACOB, 35, MONTANA

Marketers who are selling things that often compete for discretionary dollars may try to get themselves on the “spontaneous spending” list. Impulse and extravagant purchases and experiences have not gone away, but money, calories, or time spent in this area will be more thought through.

# Reincarnation of the American Dream.

THE PURSUIT OF HAPPINESS HAS CHANGED. Hell, the whole world seems to have changed. Our current president ran a campaign on the notion of change. We asked ourselves: What are Americans still striving for today?

Here is what we found: The social ideal that, with hard work and perseverance, every American can be rich, happy, secure, and better off than their parents is no longer a certainty. While Americans still strive for these goals, they are much more cynical about their ability to actually achieve them. With material wealth and upward mobility being uncertain goals, people have expanded their aspirations to intangibles. Family, health, safety as a country, and a humble and appreciative attitude toward life are goals for today and the near future.





# American Dream Redux: Modest, Prudent, Cynical, but Alive

We asked American consumers what they were currently striving for, and what they had given up on. While many still aspire to achieve familiar aspects of the American Dream (e.g., comfortable retirement), others are being relinquished (e.g., furthering one's education, regular vacations). Even more surprisingly, the somewhat less specific goals of "good health" and a "safe country" were the top two choices.

## STILL STRIVING TOP 3

- 1 Safe country
- 2 Good health
- 3 Comfortable retirement

## GIVEN UP ON TOP 3

- 1 Furthering my education
- 2 Regular vacations
- 3 Staying youthful

## LIFE IS NOT FAIR

Confidence in the American Dream has been shaken, but the belief that hard work will pay off does persist, albeit in a more cynical form. One community member offers this perspective to future generations:

"There are 4 things that you need to remember. 1. Don't take anything for granted. 2. Life is not fair. 3. Work hard for everything. 4. Life is not fair. Yes, I know I said life is not fair twice, but that is because that is the hardest fact to learn and understand. You may work hard all of your life, do everything the right way, and watch others around you seemingly take the shortcuts and get rewarded for them...Always remember that the most important thing in your life is people—things can be replaced, but people cannot."

LUCI, 22, OHIO

THE AMERICAN DREAM IS NOT DEAD—people still aspire to it, they just doubt they can actually achieve it. It has been reincarnated and exists now in a more cynical form. Marketers must be aware of the competing forces that shape consumer consciousness today. On the one hand people are unsure about ever feeling financially safe and confident again. Yet they also seek and value peace of mind, feeling safe, and a positive outlook on life. Messages that speak to both the wish for safety and the doubt most people feel will resonate more than bold promises.

## DIAL DOWN YOUR AMBITIONS

Americans are adopting a more modest approach to accumulating wealth. When we asked consumers what they'd rather have, for example:

**93%**  
would rather have "respect from family" than "status in the world"

**93%**  
would rather have a "smaller house without a mortgage" than a "big house with a mortgage"

Indeed, keeping ambitions small—but realistic—may be one way to find security and stability amidst so much uncertainty. "Downgrading" can open up new doors and bring (intrinsicly) rewarding opportunities:

"I think it's my salary that saved my job. Given my education and experience, I should be paid more, but because of my lower salary, I was spared layoffs."

SHARI, 32, COLORADO

"Changing your financial focus allowed you to move into a new social circle with new friends in similar situations who understood life, not competed for who had more."

COREY, 33, CALIFORNIA

"Our dreams of trading up to a nice three bedroom in a good neighborhood have been shelved. On the positive side, we are being more realistic in our search and our plans for the future...I carefully budget for my family so we are able to do most of the things we want while not worrying that the mortgage won't get paid."

SIANNA, 27, NEW JERSEY

## ADJUST YOUR EXPECTATIONS, BUT STAY POSITIVE

Resetting expectations—to be more modest and circumspect—is the outlook for the future and is a key attitude we see emerging.

**28%**  
say that "no amount of savings would ever give me true financial peace of mind"

True peace of mind is to be derived—not from possessions acquired or a particular sum of money in savings—but from a positive attitude toward life and the values of prudence and hard work (knowing you adhered to them and did you best).

"While the recession has decreased my income and resources it has caused me to focus more on where I am at and where I want to be, both financially and personally. I want to be sure to maintain this focus going forward as times improve."

STEVE, 52, IDAHO

# Disenchanted with the pursuit of money.



WITH ALL THE STRESS and talk about financial problems, we wanted to understand what exactly Americans would do for financial gain and what they would need in order to have some sort of peace of mind.

To our surprise, we heard from Americans that as much as they'd like more money they are drawing clear lines between what they will and will not do in the pursuit of money. Much of this disenchantment with the pursuit of money comes from the increasing belief that we must "work until we die," causing many Americans to fall out of love with the rat race. We are reconsidering and reprioritizing the value of work in and of itself, and the work/life balance is a revitalized aspiration.

# “Having it All” is no longer worth it

We asked people across a broad range of domains what they would rather do and found that people are trying to put boundaries around or minimize work to make more space for family and security that stems from focusing on basic needs and what really matters.

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## The climb is not sublime

**75%** would rather “have a secure job, but without the opportunity for raises” than “have a less secure job, but have consistent raises”



### The paycheck is put in perspective:

“What I would say is don’t sweat the paycheck. If you spend your day feeling lucky to do what you are doing... you’ll find it easy to make a dollar stretch. If your work is drudgery every day, you’ll soon find that no matter what size the paycheck, it isn’t big enough.”

ABI, 39, NEW JERSEY

**75%** would rather “get out of the rat race” than “climb the corporate ladder”



“Find a job you actually enjoy, but if for some reason you can’t right away, just pick one that doesn’t make you miserable, and stick to it, because it can just as easily be taken away..”

LINDA, 23, INDIANA

## Quality time trumps money

**76%** would rather “spend more time with your family” than “make more money”



### Friends and family are what “really matter”:

“The recession has uncovered your true priorities: In the end family comes first, money (or lack of it) can cause stress and anxiety. You’ve been happiest when you’ve been able to let go of the stress and worry and live in the moment. Using your extra time (due to reduced work hours) to organize your household records and closets and get rid of clutter has added to peace of mind.”

LORETTA, 59, CALIFORNIA

## Nice guys/girls finish first

**91%** would rather “marry a nice guy/girl who’s poor” than “marry a jerk/bitch who’s rich”



### The recession has helped many build stronger marital relationships:

“The recession has made my husband and I want to strengthen our relationship with each other and our children, as well as our friends. It has also forced us to cut back on our spending habits.”

KASSANDRA, 38, TEXAS

Today, there is no end game and striving for the ephemeral goal of “having it all” seems unrealistic, pointless, or just not worth it. Americans are re-imagining the meaning of quality of life, re-focusing on time with family, the here-and-now, and peace of mind. By prioritizing what really matters they feel more calm and satisfied. In fact, many consumers are more concerned with personal satisfaction on their terms than keeping up with the Joneses.

# Sustainability is the new happiness.

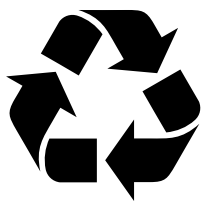


HAPPINESS IS AN ABSTRACT—and perhaps overly simplistic—goal that doesn't necessarily resonate today.

Rather we see a shift toward seeking relative peace of mind in knowing we are making choices that will not bankrupt our ecosystem, our fiscal resources, our health, or our values.

The old mantra—reduce, reuse, recycle—is now a much more holistic value; it's a way of living that has broad implications (much more than the environment alone).

# Reduce, Reuse, Recycle



IN THE END OF 2008, Communispace explored what forces shaped consumers’ “green” behavior.<sup>19</sup> A key finding from this study was that consumers were highly aware and focused on recycling.

One year later, many of consumers’ stories focus on reducing and reusing. And their efforts are not geared toward the environment, necessarily, but more toward developing “sustainable living” in every aspect of their lives. The traditional pursuit of happiness—which is bound up with accumulation of material wealth—is being relinquished in favor of the pursuit of peace of mind. Consumers are achieving this goal by adopting sustainable living habits for the long-term.

“Perhaps by now, we will be less known as a nation of consumers and more a nation of problem solvers. To live to merely consume is an empty life that takes you careening from the last best thing to the next best thing endlessly. Use your money wisely. Save for tomorrow, give away as much as you can afford, buy experiences and education. Find your passion and cultivate your relationships.”

ELLE, 41, DELAWARE



JOSEPH

## They are doing it themselves

By learning new skills, Joseph and others have become more self-reliant and less dependent on expensive, mass-produced products.

“I have learned how to make some of the things I really like. I don’t worry about the high price of beer, wine or soda, I make it. I don’t worry about furniture; I make my own and sell to others. We have the best appointed kitchen around...”

JOSEPH, 55, FLORIDA

“We grew a bumper crop of tomatoes and the apple trees are overflowing. My wife has been trying to can as much as she can for the year. The more that is put up the less we need to buy.”

DAVID, 42, USA



TONYA

## They are streamlining

Tonya and others have found a new balance by reducing waste, streamlining material possessions, and being more creative with the resources they do have:

“I go thru my things every couple of months and if I’m not using it, I give it away: clothes, small appliances, whatever...I really have to put on my creative thinking cap...now I really think about how I can reuse things and simplify my life.”

TONYA, 55, ALABAMA

“I used to spend way too much on expensive scrapbooking supplies when I already had more than I needed. Now I find ways to use the supplies I already have or repurpose things that I have lying around the house. It forces me to be more creative, which is a great thing.”

CRISTY, 22, MISSOURI



MICHELLE

## They are getting healthy...

...for peace of mind and to save money. Michelle and others realized that there is a not only a figurative but a literal price to pay for unhealthy habits...

“Getting healthier as I think about medical costs in the future and how to avoid them. I want a clean body and mind for my family and I as we manage life with less...I get peace of mind knowing I am promoting wellness in my family.”

MICHELLE, 34, NEW YORK

“It is good to be conservative and enjoy the simple things in life. Exercise is generally quite affordable. Eat right and work hard to stay healthy.”

JASON, 35, MISSOURI

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Marketers need to appreciate, respect, and support consumers in their efforts to lead more sustainable lives. It is a more complex value proposition—keeping me healthy and saving me money; inspiring my creativity and conserving resources—but brands that can address these multiple needs will be in step with what consumers are seeking and compliment the emerging mindset.



Eyes Wide Open  
*Wallet Half Shut*

**IMPLICATIONS**

*Awake.  
Alert.  
Aware.*



TODAY'S CONSUMERS LOOK AT THE WORLD through the lens of hard won experience; they are not naïve, they are acutely aware, their eyes are wide open.

They are distrustful of institutions, the media, and the “American public,” but do rely on—and seek to protect—their own selves, family, and community. Consumers are emerging from this recession deliberate and discerning, and with their wallets half shut.

This mind-shift can be likened to a raising of consciousness that intersects with every aspect of living. The recession has been painful, but it has also brought people's lifestyles in line with what really matters and consumers are not universally despairing. While this recession may have given rise to more cynicism, doubt, and confusion, it has also been the springboard for Americans to develop new strengths, appreciate life's intangibles, and reconnect with core values.



### 1. **Wake-up. It's not the economy, stupid.**

Even though we are still in the midst of a recession, it doesn't mean that everything needs to be contextualized within this framework or that all decisions we make now are due to our economic situation.



### 2. **Tell all—the brand with the better information wins.**

Even if the information is not always flattering. Consumers are more intent than ever to do their homework before they open their wallets and want easy, transparent information to make a sound decision.



### 3. **Take a stroll down Main Street—it's a sure road to consumers' hearts.**

Consumers are weary of things distant and abstract and feel affinity and trust to things they can touch, see, and feel on a local level. The closer you are literally to the consumer, the closer they'll feel to you as a brand.



### 4. **Tap into Americans' inner strength; don't exploit their fears.**

It is no longer productive or new news to remind Americans of how bad it is out there. Americans are feeling stronger than we give them credit for and are ready to rise to the occasion, brands just need to align with this can-do attitude and be helpful to people in their quest for something better.



### 5. **Beware of the price trap. Price games equal short-term gains— quality endures in the end.**

Spending money more wisely doesn't always equal spending less money. There is an obvious draw to talk about better prices or great deals. And right now this may work to get consumers switching. However, a great low price without measurable quality or value may feel like a sacrifice or deprivation not worth making in the long run. Yet, value brands that can make an apparent "trade down" feel like a "trade up," can better ensure a permanent shift.



### 6. **Surrender to the complexity and stop trying to artificially label and bucket consumers.**

It's more efficient for brands to work on being understood than for brands to strive to understand consumers in every context and with all their complexities. Stand for something you believe in and that will open up many roads for consumers to find you and feel your relevance.



### 7. Broaden your competitive set—today everything is game.

Consumers are evaluating how they spend their time and money on a very macro level. Their eyes are wide open and they are making trade-offs and choices across seemingly unrelated things. Marketers need to get a better grasp on what they are really competing with and to be aware that the competition outside their category may be more of a threat than those within it.



### 8. Re-think sustainability.

Brands need to respect and support the ecosystems consumers are now creating to achieve more sustainable lifestyles for the long-term. As consumers try to re-imagine lives that are more financially secure, healthier and better grounded in their values, brands can play an integral role in meeting multiple needs. Brands need to make sense within a broader framework for how consumers want to construct their lives. This often means looking beyond a certain feature or benefit to delivering on a more demanding set of criteria for how consumers choose brands.



### 9. Let them eat cake—luxury never goes out of style.

Luxury brands can capitalize on the growing need to escape and indulge, but need to recognize that this splurging may often be the result of a rational decision making process. Marketers can help consumers plan out their “recklessness” to get on the list for this discretionary spending.



### 10. Keep eyes wide open. Don't be afraid of the dark side—it has helped us all see the light and to re-imagine what's possible.

And though we all know the dark side is there, it's more productive to speak to the light. We need to remember that our newfound consumer consciousness has us as open to hope as to hard realities, to wonder as to woes, and to creativity and re-imagination as to conservation and preservation.



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The world's most admired brands turn to Communispace Corporation, the leader in generating game-changing insights via private online customer communities. Founded in 1999, the company has created more than 350 customer communities for industry leaders such as Kraft, Hewlett-Packard, Charles Schwab, Hallmark, Unilever, GlaxoSmithKline, and Hilton Hotels Corporation. Headquartered in Watertown, Massachusetts, the company has offices in Atlanta, Chicago, London, New York, San Francisco, as well as San Remo, Italy and Sydney, Australia. For more information, please visit: [www.communispace.com](http://www.communispace.com).



Founded in 1976, Ogilvy Chicago, which includes Ogilvy & Mather, OgilvyAction and OgilvyOne, is a one-of-a-kind shop that utilizes a 360 Degree Brand Stewardship approach to clients, including Allstate, BP, Kraft and Unilever. The agency was recently named “digital agency of record”: for Chicago 2016; and recently brought home a Grand EFFIE and a Global EFFIE for its revolutionary Dove “Campaign for Real Beauty.” Forrester recently ranked Ogilvy Interactive the #1 digital agency. Ogilvy Chicago is a unity of The Ogilvy Group, which is part of WPP Group plc (NASDAQ: WPPGY), one of the world's largest communications services groups.

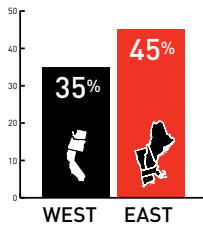
## DEMOGRAPHIC DIVIDE

Further complicating the picture of post-recession consumer consciousness is the fact that economic anxiety is experienced differently—where you live, how old you are, whether your married or not, whether you are a man or a woman, are all factors.

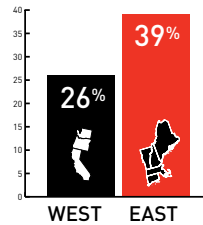
### West Coast vs. East Coast

West Coast = Surf's Up; East Coast = Man Down.

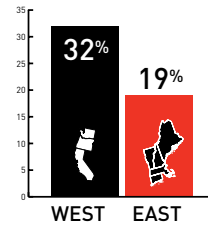
On a scale from “non-existent” to “through the roof,” percentage of Americans who say their economic anxiety is “high” or “through the roof”:



Percentage of Americans who say that the recession has changed their spending habits:



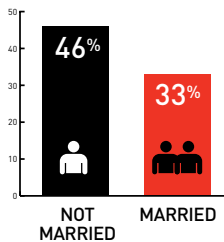
Percentage of Americans who say that the U.S. will emerge from this recession stronger:



### Married vs. Unmarried

“It’s okay, we’ve got each other.”

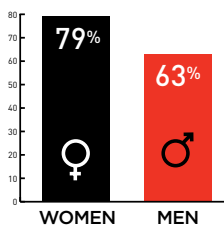
Being married appears to take the edge off of economic anxiety. Percentage of adults who say their level of economic anxiety is “high” or “through the roof”:



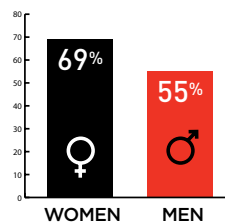
### Young Men vs. Young Women

“Nervous Nellies abound”

Women felt more anxiety about the recession than did men. Percentage of adults under 45 years old who say they have more personal economic anxiety now than they did before the recession:



Women are the most alarmed by escalating unemployment rates—despite the fact that only 1 out of every 5 jobs lost in the recession were lost by women.<sup>20</sup> Percentage of adults under 45 years old who say that one of the scariest pieces of news during the recession was when unemployment surpassed 10%:



## Generational: X & Y (<45) vs. Boomers (>45)

“Gen X & Y in need of stronger wake-up call”

### What makes you most upset about the recession?:

	UNDER 45	OVER 45
The decreased value of my home	23%	29%
The decreased value of my 401(k)	22%	29%
That the government has given bailouts to the banks	55%	62%
That “Main Street” isn’t receiving enough help	26%	35%
How the media has handled it	27%	32%
That I was unprepared	31%	20%

31% of Gen X & Gen Y said that being personally unprepared was the thing that upset them the most about the recession versus only 20% of Boomers who said the same.

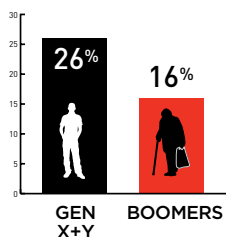
But, 42% of Gen X & Y say they only need 6 month’s salary or less to have financial peace of mind, compared to only 24% of Boomers who say the same.

### How much money do you personally feel you need to have saved to have financial peace of mind?:

	UNDER 45	OVER 45
Less than one month’s salary	3%	2%
One month’s salary	4%	1%
Three month’s salary	13%	7%
Six month’s salary	22%	14%
Nine month’s salary	4%	2%
One year’s salary	13%	13%

## Boomers Seeing a Bleaker Future for U.S. Economy

Percentage of Americans who say that this recession signals the “end of U.S. dominance in the world economy”:





## HOW WE DID OUR RESEARCH

We used a variety of research methods to understand how American consumers were emerging from the recession, and how their experiences were shaping mindset and behavior. Data for this study were collected in October, November, and December of 2009.

Ogilvy Chicago conducted quantitative and secondary research:

- A robust online survey among a nationally representative sample of 1,200 American adults conducted through MarketTools
- Various secondary sources as noted

Communispace Corporation conducted qualitative research:

- A series of interactive explorations with online community members (e.g., image galleries, discussions, brainstorming sessions, open-ended surveys; 10 online activities conducted over a two-month period).
- 694 American men and women participated (online community members that participated in interactive research were: 59% women, 41% men; adults ranging in age from 19–69, and were from every region of the United States).

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