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CONSUMER PERCEPTIONS: THE GOOD, THE BAD, AND THE UGLY

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INTRODUCTION

With over 105 years of editorial and consumer research experience, which influences 27 million consumers, we at Good Housekeeping know that the 1990's will be an era of enormous change with a hold on traditions of the past.

THE "NEW TRADITIONALIST"

During our long watch of American women, however, we've discovered that certain trends occur without rhyme or reason. These we call "wild cards," and, quite honestly, these trends - ushered in from left field - usually stem and flourish as the result of disasters. A couple of examples: Wars, such as WWII, Vietnam and, to a lesser extent, even the recent Desert Storm, have forever changed the face of American culture. The Alar incident, the most recent food safety hysteria, was another wild card. And the AIDS epidemic has recently changed our attitudes about sex and health-care money allocations and will soon change the entire health insurance industry. Will the recent Senate confirmation hearings on Judge Clarence Thomas change or heighten America's attitudes on sexual harassment and women's issues in politics? We'll have to watch the next major election to see.

But back to the trend we at Good Housekeeping refer to as "New Traditionalism..." If we look at the lifecycle of the Baby Boomer - and, at thirty something, that's me we're talking about - we first see the Fifties when moms were home, Eisenhower was in the White House and we led "Donna Reed" and "Leave It To Beaver" innocent lives. The Sixties, thanks to Vietnam, gave us the "Protest Decade", and women, similar to their grandmothers in the suffragette days earlier in this century, took to the streets, this time to object to the first "TV war". Because of these vocal Sixties, women discovered that their voices really did count, and, following Vietnam, the women entered the Seventies to fight for their equal rights. Back to the job sights they went in droves and their anger at all those years of being ignored simply boiled over! Of course, with their paychecks, many of these women became the Eighties Yuppies. The decade of buy, buy, buy was certainly an amazing acquisition era. Materialism reigned.

Now, here we are in the Nineties, and, while we're fearful to admit it, we're beginning to feel that maybe, just maybe, our moms and grandmothers weren't so dumb and old-fashioned after all. We are exhausted by the Eighties "Go-Go Years" and we worry that our children may miss what we had when we were growing up - Mom, the flag, apple pie and that big front porch swing. By combining the best traditions of the past and remodeling them to fit with our lifestyles of the Nineties, we feel we're on to something important.

Keep in mind, however, that these decades really don't start and end in ten-year increments. For example, the Seventies really started in the mid-Seventies when Nixon brought
the troops home from Southeast Asia. The Eighties actually ended with the aftermath of the 1987 crash on Wall Street. Trends just don't coincide with the turn of a decade.

Now, back to the "New Traditionalist..." We at Good Housekeeping found her - via a Yankelovich study - in 1988. We went back in 1989 to find out how she'd progressed in a year, and we discovered that we were her! Faith Popcorn, the founding futurist of "Brain Reserve," discovered that the "Second Wave" of New Traditionalism is characterized by six important "titles," the:

- Socially Conscious
- Consumer Authority
- "Safe" Adventurer
- Keeper of a "Good House"
- Time Manager
- Individualist

While most of these points will be covered shortly, the "Safe Adventurer" aspect is rather intriguing. Basically, it says we're so involved in our work and our lives that we're looking for unique experiences - Outward Bound-type environmental vacations are one example. We want mental and physical challenges to balance the mundane aspects of our daily routines. Another example: Most theme parks, like Disney World, MGM Park and Universal Studios, sell more tickets to adults (and many seniors) than to kids! We want to be scared to death on the rides but we want to walk out alive. Remember, more money has allowed us to purchase more, and TV has allowed us to live vicariously through watching others. Now we want to have new experiences as our entertainment.

The individualist aspect also follows along these lines. While we live our lives trying to "fit in" at work, in the community and in society in general, we, as New Traditionalists, also want to be unique, and we are now leading our lives to show our individualism.

Based on these six points of this "Second Wave," we have devised a name for the Nineties. We call it "The Decency Decade". We feel that this era will be characterized by "Faith, Hope and Purity."

"Faith" refers to the return of faith in the community. While Faith Popcorn coined the term "cocooning," we feel that, yes, we did go home to envelop ourselves in our safe home, our cocoon. But we soon discovered that if our communities weren't safe, then our homes were not secure either. Thus, while volunteerism was down in 1986 and 1987, according to national figures, it started edging up in 1988 and continues to climb today. Corporate-backed employee volunteerism has also helped this movement. We're seeing a rebirth of community activism and also witnessing a "new consumerism" movement.

This new consumerism is a result of recent events. First, thanks to the 800 phone number, we consumers can quickly register our product comments and receive immediate feedback. Second, we consumers realize that we are our own activists. We no longer need a
Ralph Nader of the Sixties. All we have to do is pick up the phone and call our senators and representatives. Finally, recent consumer involvement with food safety issues such as Alar, and neighborhood-based environmental issues starting way back with Love Canal, have demonstrated to us that we, ourselves, can make a difference.

Even the term "Good Housekeeping" has taken on new meaning during this New Traditionalist era. No longer a "housekeeper" on the periphery of society, the New Traditionalist is the keeper of a "good house" at the very center of society. Her home is her power base, and her purchase activity is her political weapon for making herself heard.

One of the most recent examples involved the consumer backlash to the controversy of drift netting and tuna fishing. You know when the issue makes it into the movies such as "Lethal Weapon II" that massive negative consumer attention is very powerful. In fact, thanks to the consumer backlash, the three major U.S. tuna packers announced that they would stop buying tuna from catchers who employ drift netting which needlessly kills dolphins in the tuna nets.

The second major New Traditionalist theme is "Hope". We consumers do feel that, with our efforts, we really can made a difference, and so we do have hope for the future of the "family" and for our children.

The Nineties will be a time when we emphasize this nation's children. With drugs and crime seemingly forever on the increase, we are extremely concerned for our children. We're also afraid that the innocence we experienced when we were growing up - Grandma on the front porch - will be lost forever. Because of fond remembrances of our growing-up years, we are taking the best traditions of the past and melding them with our lifestyles of the Nineties.

The third aspect of the New Traditionalist Nineties is called "Purity". The current environmental movement, unlike the ripple of the Sixties, will probably not disappear. Why? Because almost every municipality in this country is facing a shortage of dump space within its respective jurisdiction. Because of this impending crisis, we consumers will be taxed for the garbage we do throw out. Since we citizens will be reminded - on a daily basis - that we are paying to dispose of empty containers and other trash, we are, and will continue to be demanding that consumer goods manufacturers handle the trash remaining after their products are used by us consumers. We consumers will expect environmentally safe packaging - containers that safely biodegrade or containers that can be and will be recycled.

A new era of "making do," similar to the "waste-not, want-not" attitude of the Depression, will return in some fashion. The Yuppie era has left us consumers - even Yuppies! - disgusted with our glutinous Eighties spending. Besides, we've now purchased every major item we'll need for the next decade!

With these three major trends solidly planted in our image of the Nineties, we at Good Housekeeping are calling this era "The Decency Decade". In summary, we believe the Decency Decade will be a good decade for the family, for the environment, for consumers and for corporate ethics.
THE RETURN TO "HOME"

Yes, we do see consumers continuing to show a greater interest in our homes and the symbolism attached to the rituals and routines of home life. What was known in the late Eighties as "cocooning" - Yuppies going home and staying there after a hard day of work - has now become an acceptable mission.

Why? Because Americans seem to be leading "fast-forward lifestyles." Just as we consumers fast-forward our VCR's, so, too, are we fast-forwarding our lives. With more appliances and gadgets (video camcorders, food processors, microwave ovens, fax machines) to save us time, we're actually using that spare time not to relax, but to shove more and more work into that time. The result: We're the "Tired Americans" who are ready and willing to stagger home, exhausted after a day of work, and collapse in front of the TV with a take-out pizza.

Interestingly, now that we're spending more time in our homes, we're also spending more money on upgrading them. Currently, many of us can't afford to move to fancier homes, so, instead, we're remodeling our current structures. The first two areas for remodeling, because they tend to "age" first and also because we want to upgrade and expand the space, are the kitchen and the bath(s).

While we're remodeling the kitchen, however, we're not necessarily cooking more than in the past. We are spending more time there with family and friends. Just like in the Twenties and Thirties, when the family sat around the kerosene lamp, the kitchen is again the center of home activity. The small TV has already been moved into the kitchen, and we're anticipating that the VCR will soon also make its way there. Then, sales of video cooking demonstration tapes should experience at least some increases. The computer, too, is finally making it to the kitchen for the kids' homework and the parents' checkbook balancing. Still, we'll be seeing much more convenience-food preparation with even more take-out/bring-home foods. Long involved recipe preparation, even now, is being relegated to the weekends.

(The remodeled bath, by the way, is the ultimate necessity these days. According to professional remodelers, the bath is often the last room in the house where a family member, especially a harried parent, can still lock the door, turn on the water and drown out the sounds of the world - and the screams of the kids. And two bathrooms is a must today; it's not even considered a luxury anymore!)

FOOD AND HEALTH

We know at Good Housekeeping that over the past 106 years of the magazine's readership history, women have always been "The Keepers of the Medicine Cabinet." Of course, in the past, there was a very good reason for this: It was important for the women and girls to take care of the breadwinning men and boys in the family.

Today, however, this concern seems to be generational. Older men and women expect the women to take care of the family's health while younger consumers of both sexes take
responsibility for their own individual diets and health concerns.

Regardless of age, however, consumers, in general, understand the strong link - the triad - among personal fitness, diet and health; probably because the three top killers - heart disease, cancer and stroke - all are related to this triad.

Yet, despite this health consciousness, we consumers seem to be "Living in Paradox." We are the Diet Pepsi Generation that also wants luxurious, high-fat Dove Bars for dinner. We Americans are no longer following specific diets. Each of us adheres to our own "food system" of dietary checks and balances. We'll have a low-calorie salad for lunch which allows us chocolate cake for a midnight raid on the refrigerator.

We often refer to all of the irresistible foods as "jumper foods". While we have great intentions of fresh fruit, veggies and lean fish, our stomachs force us to reach for the pizza, potato chips and cheese-yums. Somehow those foods just jumped into our shopping carts.

While we Americans seem to be reaching for overall good health (and not just lower calories) for weight control, we know at Good Housekeeping that readers still always will be fighting the scales. Body image continues to be the primary motivator for Good Housekeeping readers, yet they do not want to expend a great deal of energy achieving good nutrition. The goal is "painless good nutrition" which allows for "reward foods," thus, the future for food manufacturers includes producing great tasting foods and treats without the guilt of high fat, high cholesterol, high sodium, or high calorie levels.

In addition, the fitness movement, while a definite trend, is also changing. While we're still interested in fitness and seem to understand its importance to total health, as a whole, we're spending less time and less effort exercising. That's because the generation that started the fitness movement is getting older, is busier raising children and has discovered that the research shows we don't need to run ourselves into the ground to achieve some of the benefits of gentler exercise.

Still, we credit the fitness movement with giving us a less "thin" and more muscular looking body image for both men and women. The latest spate of movies, such as Thelma and Louise and Terminator 2, show females as "women warriors," - physically able women. Conversely, we know that many of us exercise not only to feel and look better, but also to allow us a few more calories for those earlier mentioned reward foods. Exercise is also part of our food system.

Like exercise, we're also looking for food to be our "fountain of youth." With high-fiber, low-fat, low-cholesterol and low-calorie expectations, we subconsciously place our faith in the idea that foods contain almost medicinal qualities. But our paradoxical thinking often confuses us when it comes to food beliefs.

When we choose foods, we may talk "health," but if the particular foods don't taste good, those foods will not be routinely chosen. (Remember the principal of "painless good nutrition").
While taste is always number one, convenience, health and price will vary in importance, depending on the specific food, the brand and our whims at the time of selection.

Regardless of their level of concern about diet and nutrition, some Americans still seem to have misconceptions about healthy eating and may be unaware of the simple steps they could take to help improve their diets.

The Survey of American Dietary Habits, conducted for The American Dietetic Association, reached those conclusions through a telephone survey of 1,000 adults after 25 or older. The study was jointly sponsored by Kraft General Foods and The Good Housekeeping Institute.

When it comes to dietary attitudes and behavior, the survey suggests that Americans can be grouped into three segments.

Approximately 26 percent of the population fall into a group which considers diet and nutrition very important; they also say they are very careful about what they eat. People in this "I'm Already Doing It" group tend to cook from scratch and purchase low fat/fat free products more often than those in other groups. They actively seek information about diet and nutrition, and read nutrition information on food packaging.

Ninety-three percent of this group think they are doing everything they can to eat a healthy diet, and the majority see no need to do more.

However, the survey found that they were more likely than the other groups to have some fundamental misconceptions about diet and nutrition, including the mistaken belief that nutritionally speaking, there are "good" foods and "bad" foods and that fat should be totally eliminated from the diet.

At the other end of the spectrum is approximately 36 percent of the adult population for whom diet and nutrition is simply not much of an issue - they don't consider it very important and they don't attempt to carefully manage their diets. The "Don't Bother Me" group tends to eat out frequently and skip meals more often than others.

Eighty-three percent of this group said they know they aren't doing all they can to eat a healthy diet. But they don't seem interested in changing their eating habits or seeking out information about nutrition. Many believe that a healthy diet means giving up their favorite foods and takes too much time.

The third group, comprising about 38 percent of the population, represents the middle ground. The "I Know I Should, But..." people think that diet and nutrition are fairly important, but only 40 percent feel that they are doing as much as they should to balance their diets.

So why not do more? Like those in the "Don't Bother Me" group, many don't want to give up the foods they like and think a healthy diet takes too much time.
The consumers' perceptions of foods' healthful images include 1) all or nothing; 2) short messages only; 3) never read the small print (though this is changing); and, 4) strong personal opinions. Consider these four points when you think of the consumer's perception of "Red Meat is Bad." Now use these same points when you consider how successful the pork people have been with "The Other White Meat" positive campaign. Can you imagine we consumers waking up one morning to read the new campaign and saying, "You know, last night, God made pork white; we can eat it again!"

We are starting to read the fine print, so the point of "never reading the small print" is changing. For example, "all natural" used to be the big selling point for packaged food products. While the term is still important for commodity foods such as meat, poultry and milk, consumers do not necessarily trust the "all natural" claim on packaged goods. Actually, we still want to see the term, but we will read the labels on those packages to make sure the ingredient labels do not include "unnatural" components. As one focus group member said to me, "If I can't pronounce it, it must not be good for me!"

So while "natural" isn't the successful selling term it once was, consumers do want the natural image; however, the term "fresh" is the new darling labeling term. Still, I get a little concerned when, at the Good Housekeeping Institute, we see an ad for canned tuna claiming "Packed in Fresh Spring Water." Obviously, concerning the recent government intervention on this claim, the FDA decided that action was warranted when it came to "fresh."

Food safety and the past salmonella, Alar and Perrier scares seem to have been behind the proliferation of "fresh" claims. Consumers are still afraid of the unknown, and nothing rocks our confidence like food fears. As one consumer told us, "I don't want things in my stuff." Because food is such an inherent part of our culture, "food frights" wreak havoc on the food industry.

Human nature also dictates that "food is not safe" is consistently more believable than "food is safe." It's more tantalizing to hear that glass shards have been found in baby food (National Enquirer) than that baby food is healthy (Journal of Pediatrics).

Interestingly, we consumers do not think that we are the biggest food safety culprits. Our readers would rather blame food manufacturers and processors and supermarkets than to think they are responsible for the majority of food safety-related illnesses reported - and unreported - in this country.

THE NEW INFLUENCERS

While our traditional homemaker reader has always been the target of the marketing world, we know that the traditional homemaker is now in the minority. Over 60 percent of our readers now work part- or full-time. Yet the glamorous executive working woman - "Superwoman" - also does not exist, in most cases. We know that the majority of working women today are employed out of necessity, not for the glory of that dream of executive pay and perks. In fact, a recent GH/Roper survey found that 55 percent of women return to work within a year of a child's birth. And while many of these women like to work, for the first time in some
years, we've noted a ripple feeling among women that they would prefer to raise their children and stay at home during those early years, but they simply can't afford that "luxury." Yet, compared to 1986, today's time-pressed mothers are actually spending more (not less) time at home with their families, according to a GH Roper poll.

Of course, the most precious commodity here is time. According to that same poll, since 1982, the proportion of women who say they don't go out for enjoyment in a typical week has increased about 30 percent, to 39 percent. This "leisure deficiency" affects every aspect of consumers' lives. For example, a working mom shops more like a man than like a work-at-home woman. This means food marketing messages must be quicker, cleaner and, yet, packed with vital information to educate this on-the-run consumer.

What consumers are looking for is an "escape from complexity." Can't you hear yourselves saying, at times, "...just help me!"

With all the past emphasis on female consumers, men are finally being recognized in the food marketing arena. More than 40 percent of all supermarket shoppers are men. With men staying single longer and getting divorced more often, the stereotypical male consumer of the past has all but disappeared. That being said, however, men are what we call "the amateur consumers." Their shopping knowledge base is not as keen as that of their female counterparts, and so they're ready and eager to learn and are, at this time, "ripe for the picking" when it comes to targeting them with marketing messages.

THE POWER OF "FAMILIES"

"Families" as influencers are certainly changing. While we see that New Traditionalist consumers again cherish "families," the old stereotype of Mom, Dad, Dick and Jane and Puff and Spot just aren't the typical family unit. Let's do a reality check on our old assumptions; consider these statistics:

In 1970, the traditional family of mom, dad and kids comprised only 40 percent of families. In 1989, the number had dropped to 27 percent.

In 1960, only 10 percent of American children lived with one parent. By 1986, 24 percent (a quarter of the child population) lived with only one parent. While the majority resided with moms, about 13 percent lived with their dads. In fact, over six million women (and I think that's a low estimate) are raising children with absolutely no financial help from another family member or ex-spouse.

Interestingly, the older woman consumer will be, in the near future, a very powerful person in the family structure. With more women working, the grandmother will continue to work past the usual retirement age of 65. This woman will also help care - in some fashion - for her grandchildren and her elderly parents and in-laws. She is usually also the wisest consumer, thanks to years of experience and her early training in high school home economics classes and as a full-time housewife in her earlier years.
In contrast to the older consumer, younger shoppers - the teens and the slightly younger "tweens" - are the worst consumers. Seduced by fads and trendy product labels, and lacking the formal consumer education (home economics) and knowledge "at mother's knee," these young shoppers, nevertheless, are armed with their parents and their own money, and they are spending.

Because their parents are busy working, these young consumers are becoming, according to child experts, "self-nurturing." They are quickly growing up and are taking charge of more and more of their own care as well as many daily family responsibilities that used to fall to their parents.

When it comes to cooking, we call these young consumers the "Zap Generation." They are taking on more of the family food shopping and cooking chores, and, because they've been raised in the era of the microwave oven, are comfortable with its use and familiar with convenience and microwaveable foods. These consumers are also the first fast-food generation, and they are used to the tastes of this style of eating. Eating on the run, these consumers, as well as their older counterparts, are demanding "one-handed foods" that are dripless, portable and single-serve ("miniaturization").

Unfortunately according to the President's Council on Physical Fitness, this fast lifestyle has spawned eating habits that have contributed, over the past decade, to the shocking 50 percent increase in childhood obesity. But fast foods aren't the only contributor's to kids' frightening health statistics. According to research out of Boston, the link between hours of TV watching and incidence of overweight children is clearly linked. Children and adolescents spend 22-25 hours per week watching TV. Still, TV is also not the villain.

Many sedentary children - offspring of the fitness generation - simply don't move enough. According to the President's Council on Physical Fitness, 50 percent of girls aged 6-16, and 30 percent of boys aged 6-12 cannot run a mile in under 10 minutes. And 75 percent of children drop out of sports by age 15.

THE NEW COOKS

Convenience foods have quickly lost that bad old image of "substitute" and "make-do." Only the oldest homemakers still feel a bit guilty in "confessing" they use at least a few convenience food products. In fact, in a recent GH/Roper survey, more than half of all female heads of households said they look for shortcuts and use convenience foods every time they prepare a meal. And 81.5 percent agree that, "I like to cook but only when I have time."

The home economists at Good Housekeeping know that they must create and publish more advanced and elegant dishes for experienced cooks and for those more elaborate weekend meals. Yet, more than ever, they're developing recipes with what we call "The five-ingredient solution." Use more than a half-dozen or more main ingredients, and more than a couple of spices, and we lose our readers. In fact, readers scan a recipe to make sure it includes just a few ingredients - and they had better be familiar ingredients at that. Consumers are looking for "idiot-proof" foods. Because they have less time to cook and to "practice" cooking as their
mothers did on a daily basis, many consumers aren't real savvy about food preparation, so the recipes better have a wide margin of error. For example, refried beans, casseroles and Italian food (pasta) are idiot-proof. The more you "torture" and cook them, the better they taste.

We are also seeing that consumers are becoming accustomed to a much less salty and sweet cooking and a more highly seasoned and spicy cooking. With toddlers eating Chinese and Mexican foods, you know that the next generation will be consuming even more spice? (Fat, however, is the hardest taste and texture to cut from a recipe.)

In fact, we're finding that more readers are "eating out at home." With more restaurants - from elegant to family style - offering take-out and even home-delivered foods, families are mixing and matching, such as home cooked pasta and supermarket deli meatballs and sauce.

With that "return to the home" trend, home entertaining is on the rise, and home entertaining usually includes food as the centerpiece. Interestingly, unless it's the holidays, fewer consumers are planning elegant sit-down dinners via written invitations.

We're seeing lots of casual get-togethers, inviting the neighbors over for dessert and a VCR movie, for example. With over 90 percent of consumers owning some sort of barbecue grill, from tiny beach grill to the built-in vented kitchen electric unit, barbecuing in summer and more and more in winter seems to be America's favorite food event. What's more, with barbecuing, men usually take over, making their first, and sometimes, only, foray into cooking right in front of the grill.

CONCLUSION

Food is such an integral part of our lives that we often fail to see how it affects our lifestyles (and vice versa). While we say we're eating lighter and are demanding that food be "fit and fast," we also want it to be "fun." Food is "theatre," entertainment in itself. Why else do we continue to enjoy hot dogs and America's all-time favorite meal, the hamburger with french fries? Certainly not for the health...!

Food is also very "personalized." It is deeply ingrained into our society and our culture. Interesting, the prediction for 1992 and the European Economic Community provides a good example of food and culture. If the sociologists and economists are correct, the countries in the EEC will most likely, within a few years, adopt a common coinage system, a move that was unthinkable only a couple of years ago! The last major aspect to change will be the individual countries' food customs!

To conclude, I just want to let you know where food fits into the priorities in my post-Yuppie-heading-for-age-forty personal life: I want a home, I want a family, I want a career, but most of all, I want a doughnut!