

EMERGE SMARTER

eBOOK INSIGHTS

A Marketing Blind Spot: The Rise Of The Single Adult Majority

An exploration of an often overlooked cohort for developing more relevant marketing strategies.

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WHAT DO YOU THINK OF WHEN YOU HEAR THE WORD “SINGLES?” AMY SCHUMER AS A TRAIN WRECK? STEVE CARRELL’S 40-YEAR-OLD VIRGIN? OR PERHAPS IT’S BRIDGET JONES, THE LONELY HEART WHO STAYS AT HOME WITH HER CATS?

Whatever you thought singles might mean, I’m betting that when you hear “singles,” you’re likely to immediately gravitate to a strong image for at least one aspect of singlehood. But what if I told you that research shows that singles in today’s world have less to do with being “unsettled,” “disorganized” and “lonely,” and are more likely to be associated with ideas like “independence,” “contentment” and “living in the moment”? The reality is, even though there may be a germ of truth in some of the stereotypes mentioned above, the world has changed greatly since those images were embedded in the American psyche more than 50 years ago.

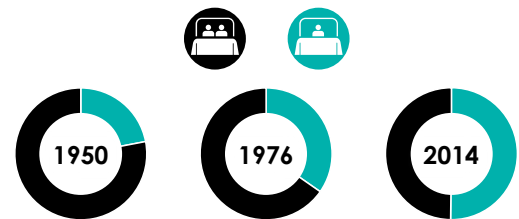
The rise of the single adult majority

In September of 2014, the U.S. Bureau of Labor Statistics reported that for the first time in history single adults outnumbered married adults in this country. Since then, the proportion of U.S. adults 18 years or older who are single has hovered at 50%. But when singles hit that majority tipping point, the media began to marvel at the shift, responding excitedly in hundreds of places including all major networks, *Time Magazine*, *Forbes*, *Bloomberg*, the *New York Times*, the *Washington Post*, and many others.

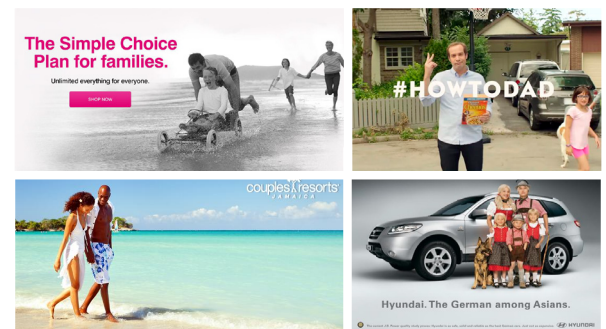
Maybe we shouldn’t have been so surprised. After all, we had been seeing a slow but steady culmination of factors contributing to this shift that, even if we didn’t have the data, we might have sensed. Unlike in previous generations, a greater proportion of today’s 18- to 24-year olds are continuing their education past high school, and today’s 25- to 34-year-olds are statistically less likely to get married following higher education. Since 1960, more younger adults, and particularly women, show signs of being more dedicated to careers over marriage. The average age of first marriage in the U.S. has slowly and consistently shifted from under 23 in 1960 to nearly 30 in 2016.

The mindset of Americans related to being single has also been evolving. For instance, the proportion of Americans who agree that “society is better off if marriage is a priority” has been consistently decreasing over the past 20 years. Pew Research reports a continuous drop in marriages and projects that one in four Millennials, regardless of what they expect, will actually never get married.

SINGLES ARE NOW THE MAJORITY



For the first time in U.S. history, singles are now the majority.



Examples of family-focused marketing abound.

\$550+
Billion

TOTAL ANNUAL
SPENDING POWER OF
ADULT SINGLES, AGES 35-54.*

So, if it's true now that the population has changed and that single adults outnumber married adults, why is it that we continue to see so much marketing and advertising still rooted in that 1960's paradigm targeting, well, families? We see it in advertising everywhere championing family phone plans, the importance of putting dinner on the dining room table or buying the family car that seats seven.

Researching the "New Independents"

In late 2014, C+R Research, in partnership with the thought-leading agency, TPN, launched a three-phase study of U.S. adults, with a focus on singles. In the first phase, we hosted a three-week online community to talk to a diverse set of unmarried adults. The exploration began with their outlook regarding their personal situation, and then focused on their behaviors and attitudes related to "Black Friday" shopping and gift-giving, understanding and what it means to be a shopper and consumer through the lens of the single adult during the holiday season.

In an exhaustive phase of quantitative research, both single and married adults

were asked extensively about their background, their current situation, their approach to life and goals for their future, their attitudes toward being single and toward being married. We asked them how they approach buying goods and services and what was important to them. All were surveyed about their attitudes and behaviors across 14 different product services and retail categories including travel, entertainment, financial products, groceries, health and beauty, dining, electronics and luxury goods, to name a few.

For the purposes of our study, we made the conscious choice to focus on the core single adult who is more likely to have deeper experiences as a single person and had entered their prime earning years, including men and women ages 30-50 with \$50,000 or more income. Single adults were defined as people either having 'never been married' or 'not currently married,' and we specified that they have no children to concentrate on research subjects living a single lifestyle.

As the research progressed, one of our earliest realizations was that even as researchers, we were subject to the biases

STEREOTYPE-BUSTING FINDINGS ABOUT NEW INDEPENDENTS

Looking for connections. We hypothesized that we would find a significant group of individuals who didn't want to be single or "lonely hearts," and who wanted to make connections with others. But New Independents presented a very different picture. Instead, they actually had more close connections than their married counterparts and they valued the freedom and independence that came with their "single" lives.

Financially constrained. We tested the hypothesis that New Independents would include a disproportionately large set of financially strapped, penny-pinching consumers, due to lower household incomes and the desire to spend cautiously. But New Independents we spoke to were more inclined to spend their money on purchases such as leisure and entertainment.

Connected mostly online. We also explored territory around our expectation that singles were going to be particularly heavy users of social media like Twitter, Facebook or Instagram to cultivate the relationships that were missing in their lives. But New Independents turned out to be much more likely than their married counterparts to favor interpersonal connections over relationships on social media.

of our own stereotypes -- perhaps built from prevailing media portrayals or just instilled in society in previous generations -- that we had to set aside in order to develop reasonable hypotheses to test.

One of the most simple biases included the academic application of the word “singles.” As people were asked in qualitative research about their single-ism and what it was like to be single, we often heard that simply being asked about being single carried a stigma. To many in the study, being identified as part of a separate “single” cohort sounded to some like an assumption of being part of a disadvantaged class. This assumption couldn’t have been further from their outlook. Based on that revelation, and on the language they used about their flexibility and freedom, we dropped the academic “singles” language from our discussion, and applied a new internal title for this group: “The New Independents.”

As we hypothesized, New Independents definitely had different goals and needs than their married counterparts. But we recognized that we were still talking to too big of a target for any marketer to tackle with a one-size-fits-all strategy for single adults. In order to recommend strategies to reach the New Independent shopper or consumer, the research was designed to understand the factors that not only differentiated this group from married adults, but also delineated subgroups of New Independents from each other.

Based on their lifestyles, aspirations, habits and preferences – and within the context of marketing situations or product categories they interact with, analysis identified 12 different consumer and shopper *mindsets* that we found distinguish the New Independents from the general population and, equally significant, from each other. It’s important to note that the analysis identifies mindsets, rather than consumer or shopper segments, and that New Independents may fall into different mindsets depending on the category they are part of.

Let’s take a look at four descriptions of four prevalent New Independents mindsets:

MINDSET NO. 1 THE URBANIST

“Value is the new cool.” This substantial group of New Independents finds status in discovering better value than the people around them, though it doesn’t necessarily mean spending a lot of money for a brand. For them, a brand has an associated badge value, and it can be important for Urbanists to be the first or an early adopter of an up-and-coming brand that might defy category and marketplace rules.

Marketing to them. The Urbanist mindset is about seeking exclusivity, such as being the first to try a cutting edge brand or being “in the know” of a new and unique dining or entertainment experience. The key to marketing to this mindset would be to communicate or manufacture exclusivity or to sell early insider access. Individuals in the Urbanist mindset are willing to pay more for offers of clever products that no one has thought of, premium customer service, special rewards, loyalty perks with great value or notably higher advanced technology. It’s important to note that Urbanists are going to be the early adopters, and marketers will want to highlight them as their brand ambassadors to all adult audiences.

MINDSET NO. 2 THE UNBOUNDED

“If I see it, and I like it, I grab it and I go.” This mindset is less about name brands and more about experientialism and experiences their purchases will be part of.

As the name would suggest, the Unbounded lifestyle thrives on the freedom of doing whatever they want, whenever they want to.

The Unbounded mindset is prevalent in the travel category in particular. As a

REGARDING MINDSETS

For the purposes of this research, mindsets should not be confused with segments. Instead, mindsets represent their thoughts and feelings for different categories. For example, a person could have one mindset when it comes to travel and vacation, but a completely different one when it comes to electronics, choosing a mobile phone provider, or picking a credit card.

group, New Independents tend to have greater ability to get away without barriers to extended leave time. In personal interviews, New Independents who aligned with the Unbounded mindset often related stories about how they were sitting around bored on a Saturday and just “took off on a road trip.”

Unbounded also tends to mean nomadic: those in the Unbounded mindset often reported more personal ties and a broad relationship network, but that those relationships were not necessarily deep.

When it comes to buying, Unboundeds in a number of categories have shorter purchase decision processes and may be prone to impulse buying, in order to get on to the experience the product will be part of.

Marketing to them. The Unbounded mindset responds to collecting experiences. Products and services that help achieve bucket list accomplishments or attain personal enlightenment, or even simply break norms -- especially if being somehow “challenged” -- are attractive to Unboundeds.

The key to Unbounded mindset appeal is to offer what New Independents will gain for their experiential resume, and to leverage that quick and impulsive decision path and keep in mind an important component of their mindset — they’ll try anything once.

“Experiential” has many levels, too. The Unbounded mindset can apply to any size category and product, from booking high-end vacations down to trying bold new flavors of potato chips -- all related to the experience of simply trying something unique that New Independents put on their experience tote board.

MINDSET NO. 3 THE BENEFICENT

“I know I’m looking for a good deal. I’ll know it when I see it.” The Beneficent mindset includes people acting as

thoughtful givers, not only to others, but to themselves as well. In this mindset, New Independents are open to external influences and are generally looking for more information as more experienced shoppers. Those in the Beneficent mindset find that shopping is an enjoyable ride, and often consider themselves experts in leveraging their retailer and marketplace knowledge to get the best bargains available. This mindset is tied to frequent browsing and shopping without a pre-set need, and impulse buying, based on finding an interesting purchase opportunity (as opposed to a purchase representing an essential experiential decision that might be associated with an Unbounded mindset). Beneficent Shoppers and consumers also enjoy trading insider shopping knowledge and are influenced interactively in social media reviews, celebrity endorsements, and online communities.

Marketing to them. Emotional connections, both within the shopping experience and as part of the post-shopping gift-giving, are the key touchpoints to the Beneficent mindset. Leveraging elements that lead to an enhanced shopping experience (personalized sales attention, special access to online sales, exclusive deals with time-sensitive urgency) can trigger greater sales with shoppers in this mindset. Further, messaging that centers on how New Independents can be recognized for their shopping expertise can also enhance sales to this mindset.

The Old Navy campaign from a few years ago featuring Julia Louis-Dreyfus was an excellent example of the Beneficent mindset. One of the ads depicted Louis-Dreyfus wanting to be the “cool aunt” at Christmas giving her nieces and nephews a pony, but she misses the fact that she could have just stocked up at Old Navy. Even though Louis-Dreyfus’s character was the object of the humor in these ads, the ad speaks to the recognition for being an expert shopper that a New Independent in the Beneficent mindset would respond to.

REGARDING MINDSETS

We’ve found that New Independents’ alignment with the four mindsets can differ by category and even seasonality, and that it’s common for them to belong to multiple mindsets. Which New Independents mindset is most important to your business? Contact C+R – let’s find out!

MINDSET NO. 4 THE INDIVIDUALIST

“Marketing tricks don’t work on me.” At first glance, the Individualist mindset within New Independents may represent a closed door. The Individualist mindset tends to be eternally independent and fiercely single, placing great value on personal privacy. To this mindset, shopping is a chore, marketing (especially from big brands) is not to be trusted, pop culture and trends are irrelevant, and brand badge value may be unimportant. While many marketers might write off a mindset like this, there’s an opportunity to embrace New Independents and to align this group through a straightforward and transparent approach that provides relief to their initial reluctance to participate in the marketplace.

Marketing to them. The idea is to communicate to this mindset in straightforward language. Showing empathy for the sentiment that shopping is a chore and offering uncomplicated solutions that remove the hassle of a shopping experience can win quicker sales conversions. Be very clear with the Individualist’s mindset and help him or her make a decision – use frank language, minimize hurdles, make easy comparisons, and offer a clear explanation of your brand’s benefits.

A great example that speaks straight to this mindset can be found in the premise of ads for Dollar Shave Club: “Buying razors sucks. Let us send them right to you.” The promise of this message is literally the removal of the shopping process, making the decision, and the Individualist’s life, easier. The experience is plain, simple, and it’s an anti-brand that works.



Dave Mastrofski
Vice President

Dave is a Vice President at C+R Research and has more than 25 years of expertise delivering insights from custom quantitative and syndicated research, as well as agency strategic planning. Since joining C+R in 2010, he has applied that experience to a breadth of analyses, including ad testing, brand positioning, concept optimization, brand health testing and tracking, creative development, packaging, attitude & usage studies, market segmentations and market opportunity identification.

His client roster has spanned a list of many Fortune 100 clients in B2C- and B2B-focused industries, including insurance, financial services, consumer packaged goods, consumer durables, adult beverages, fast casual/quick service restaurants, and advertising agencies.

Dave holds a BA in Advertising from Iowa State University.

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