The Roadmap to the New America:
Introducing the new U.S. Yankelovich MONITOR
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A NEW AMERICA DAWNING

Out of the crucible of America’s cultural and demographic melting pot, a new and profoundly different day is dawning. For brands looking to capture the hearts and minds of American consumers, that new day must start today.

The much-covered U.S. Census projection of a 2043 “tipping point,” when the country becomes majority-minority, implies a tremendous demographic sea change will reshape the contours of American society and culture. But it also implies that there is time to prepare for this unprecedented new future—that those sea changes will result from a gradual rising tide. The reality, however, is a far more immediate one affecting how Americans today live, work, play and spend. It’s a new reality that beckons new ideas, new thinking, new approaches and ultimately, a wholly new understanding of the American consumer.

The Futures Company is celebrating the nation’s birthday and the dawn of a new America with a newly launched U.S. Yankelovich MONITOR that is your roadmap to the new America: a fresh perspective, panoramic in scope and view, that translates this demographic sea change into the ways it is redefining American consumers, culture and the marketplace of tomorrow.

THE MULTICULTURAL INFLECTION POINT

A multicultural mastery of the marketplace is now a must. Many companies are doing just that, some quite deftly. This year alone, Cheerios, Chevy and Coca-Cola garnered national attention with bold campaigns celebrating multiracial, gay and multicultural depictions of the modern American family tapestry. But even the most sophisticated brands, those reaching and resonating effectively with multicultural consumers, know they need a more sophisticated approach. Much of multicultural marketing during the last 10 to 15 years has employed a narrow, segmented strategy.

“Give me your tired, your poor, Your huddled masses yearning to breathe free, The wretched refuse of your teeming shore. Send these, the homeless, tempest-tost to me, I lift my lamp beside the golden door!”

—Emma Lazarus, The New Colossus
Brands would attempt to bend their general market approach to target the perceived needs of their multicultural consumer segments. The result, though, was marketing and advertising that even at its best felt inauthentic and at its worst, tone-deaf.

This siloed approach left multicultural marketing teams separated from the brand team’s general marketing efforts, with little budget to innovate or develop original campaigns tailored specifically with multicultural consumers in mind. In particular, this approach fails to see multicultural consumers in as rich and as nuanced a way as general market consumers and it fails to reflect the increasingly blurred lines between ethnicities. The new multicultural America has effectively rendered the old approach both clumsy and moot.

The multiculturalization of America requires a reevaluation of conventional wisdom about ethnic consumers. From PepsiCo to Diageo, from Walmart to Toyota, the growing ranks of Fortune 500 companies to acknowledge and embrace the multicultural imperative signals a major shift in the dominant marketing paradigm, away from the old, siloed artifice to a “total market” approach.

The idea of the “total market” is still evolving, but at its heart is the recognition that, from inception to execution, ethnic consumer insights need a seat at the marketing table.

“**At the heart, total marketing is the recognition that from inception to execution, ethnic consumer insights need a seat at the marketing table.”**

Some brands like McDonald’s are “leading with ethnic insights,” while others are attempting to unify those insights within new pan-ethnic strategies. Either way, these future-facing brands see multicultural insights as a foundational component of success, not as a bolted-on afterthought. These forward steps reflect a realization that this is a make-or-break moment—that a “total market” orientation isn’t a nice-to-have complement but a need-to-have imperative.

**THE LAND OF OPPORTUNITY**

The demographic realities of present-day multicultural America are profound. Over 40% of Millennials are multicultural. More than half the babies born in the U.S. are multicultural. Nearly one in six marriages blend couples of different ethnicities or race. Texas, California, New Mexico, Hawaii and the District of Columbia are already majority-minority, as well as 13 of the country’s 40 largest metro areas. The 2043 tipping point is unfolding in the present tense.

The $3 trillion buying power of multicultural consumers—Hispanics, Asian Americans, African Americans and other ethnic minorities—is greater than the GDP of all but four countries. The size of the opportunity for growth among multicultural consumers in a slow-growth economy cannot be understated.

Meanwhile, Non-Hispanic White consumers remain under a lot of pressure. They are struggling to find a foothold in the post-recession economy, and this is reflected in their attitudes around risk, spending and the future. The multicultural consumer mindset, on the other hand, is characterized by more optimism, greater resilience and stronger brand loyalty. Brands that can resonate powerfully with multicultural consumers may just find the silver lining in today’s stubbornly dark economic cloud.

But beyond their buying power—and more critical to a successful “total market” execution—lies multicultural consumers’ ability to shape and influence the increasingly anachronistic notion of so-called mainstream American culture, taste and style. Minorities have long defined and revolutionized popular culture,
from movies and music to food, fashion and the fabric of family life. As cultural trendsetters, early adopters, and taste-makers, multicultural consumers wield tremendous influence over the marketplace. This will grow by orders of magnitude in the years to come. Multicultural attitudes, values and lifestyles are harbingers of the direction and strength of many mainstream American cultural trends.

Add to this the fact that younger generational attitudes have swung dramatically in favor of more openness toward and acceptance of cultural diversity. Inclusivity is a core value baked in to the DNA of the country’s most sought-after consumer demographics. For many Xers, most Millennials, and a vast majority of the generation to follow, multiculturalism is a fact of life, unremarkable and ordinary. This attitudinal orientation will only serve to accelerate the growing expectation among consumers for brands to demonstrate a similarly instinctual multicultural awareness. As a new demographic normal replaces the old one, brands can’t afford to be caught blinking.

NAVIGATING THE ROAD AHEAD

Where can brands turn to get a picture of the “total market?” Where can brands find a holistic panorama of the general marketplace as well as the multicultural marketplace? Where can brands get a broad yet deep understanding of how different segments of society influence one another? Where they overlap? Where they differentiate?

The Futures Company has these answers in the roadmap to the new America.

With the launch of the new U.S. Yankelovich Total Market MONITOR, The Futures Company will now offer the first truly comprehensive consumer insights service with a 360-degree view of the dynamically changing “total market.” This ground-breaking service is the integration of the flagship U.S. Yankelovich MONITOR service and the U.S. Multicultural MONITOR service. No other source offers the sophistication of a practice dedicated to multicultural consumer insights integrally woven into a venerable, trusted general market perspective.

The Futures Company understands the imperative of the emerging “total market.” For the first time, under one roof, brands can get a total perspective on the tableau of U.S. consumers. Dedicated perspectives on multicultural consumers segments are still provided, but this intimate knowledge of the rich diversity of multicultural consumers is now employed to enrich and enhance the understanding provided of the entire U.S. marketplace.

The new U.S. Yankelovich MONITOR is the roadmap to the new America that brands must have in order to find competitive advantage in the multicultural mainstream ahead. Contact your account team to find out more about the features of our newest innovation and how it can bring you right up to the bleeding edge of the future American marketplace.

If you’d like more information about The Futures Company’s new U.S. Yankelovich MONITOR, please contact us at:

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