THE NEW FASHIONED WOMAN

Understanding the modern woman and how brands can drive unparalleled value in her life, the community, and the world.
WE LIVE IN A TIME OF UNPRECEDENTED HISTORICAL AND SOCIAL CHANGE. Brands are trying harder than ever to engage women, but falling short with messaging that feels misplaced, unrelatable or worse yet, like pink-washing. The result is women are tuning out at a faster rate and not coming back, with 80 percent of women saying they don’t trust brands anymore. 

The goal of this research is to understand modern women’s values in a more nuanced way, and through that understanding to establish a virtuous cycle where women are genuinely getting what they want, need, and desire from brands. In turn, brands are able to achieve a relevant and even cherished role within their lives.

To develop the research, Grayce & Co, a marketing agency for women, partnered with Beacon Insight, a leading female-founded qualitative market research firm. This research was supported by Heartbeat AI, a female-founded sentiment analysis firm and by 20-20, a technology platform & recruiting company.

The research is based on 16 in-depth interviews in total (eight in 2016 and eight in 2017) with women from across the US, ranging in age from 18-31, along with three Heartbeat pulses with 600 women each for a total sample size of nearly 2,000 women. We set out to understand modern women’s minds & hearts through the following dimensions:

CONTEXT
COGNITION
FEELING
BEHAVIOR

1.SheSpeaks, March 2017
THE NEW FASHIONED WOMAN

Mini revolutions and tiny evolutions are upon us. Women are stepping out, speaking up and taking notice. To better reach and engage women, we must start by understanding that she is complex, but not impossible to understand.

SHE IS NEW FASHIONED.

She is not binary, but multi-dimensional with a fluid definition of self. She wants to be supported and nourished in her complexity. She cannot be put into a single box, and she rejects labels because she cannot be easily defined. She loathes being pigeonholed, judged, or stereotyped.

Companies that work to understand ALL of her have a huge advantage. And to really understand her is to understand that she is a PARADOX.
A set of paradoxes define the multidimensional, resilient, empowered new fashioned woman.
1. SHE IS MORE AWARE OF THE BLEAK REALITY OF OUR COUNTRY, BUT LESS WORRIED ABOUT IT

Women perceive that the country is getting worse. And interestingly, as the country grows more uncertain, women are becoming less fearful and anxious. They are growing stronger through the process – more resilient, fortified, and determined. Women are rising up. The modern woman’s strength lies in her ability to adapt quickly, deal with the uncertainty of modern life, and find meaning in a complex world. The world doesn’t scare her because she knows she can handle whatever comes her way.

A panel run in 2016-2017 revealed a fascinating, yet explainable paradox at the core of modern women. In 2016, modern women felt very bleak about the future of their country. Fear, anger, and sadness dominate, largely driven by the immense uncertainty and fear around the elections. They felt equally scared about the future of the planet.

Our qualitative research supported that: 80 percent were concerned about climate change and related issues.
Considering the progressive political leaning of millennials (over a third identify as liberal) you’d expect this feeling of worry to get even worse in 2017, however, we are seeing a fascinating reversal of this trend. Millennial women are significantly less worried and fearful - nearly 30 percent have a positive outlook on the world (up from 13.5 percent in 2016), and joy has replaced fear as the prevailing sentiment. This is due to the unique psychology of New Fashioned women: challenges make them tougher, and cause them to double down on themselves and step up to manage what seems to be getting worse. In the process, New Fashioned women are realizing something else about themselves: that they have strong values and that they are the future. This self reliance leads to more optimism, hope, and even joy.

And in light of chaos and turmoil in the world, New Fashioned women are intensely positive and optimistic when it comes to their own futures.  

1. Brookings Institute, 2016  
2. Heartbeat AI, 2017  
3. Heartbeat AI, 2017
2. SHE WANTS TO BE SEXY, BUT NOT SEXUALIZED

The New Fashioned woman defines her sexuality on her own terms. She is open minded, sexually liberated and not ashamed of it. She is unwilling to be limited by labels, and more fluid in her definition of sexual identity. 5.5 percent of women identify as bisexual (a 40 percent increase since 2010), and pansexuality – “gender blindness” associated with being attracted to someone regardless of gender or sex – is flooding cultural consciousness with public figures like Miley Cyrus, Angel Haze, Jazz Jennings, Sia, Mary Gonzalez, and Sophie B. Hawkins openly claiming their pansexuality.

1. CDC National Survey of Family Growth, 2016
The New Fashioned woman no longer feels like she needs to repress her femininity to make men comfortable. She explores her sexuality more than any other generation before her and is proud to let you know she’s having a lot of sex, and good sex at that. Women have twice as many partners as 20 years ago, and are 400 percent more experimental sexually. And because she is self-defined she desires to also be in charge of how her sexuality is represented. She rejects brands sexualizing her, but also rejects being made to be asexual. Her sexuality is part of her being a fully integrated, whole, expressed woman. She is not interested in segmenting or shutting this part of herself off.

“I feel very passionate and sexually liberated. I own all of my actions and am very comfortable expressing my sexuality. I also have very great, passionate sex currently. I think my sexuality is at the center of my identity, because having a healthy attitude and relationship with my own body/my sex life is really important to me.”
- Michaella, New York, 22

“We should enjoy our sexuality on our terms. We can have fun and not always take things so seriously. It’s our choice, it’s our power.”
- Crystal, New York, 30

“Companies and brands should know that millennial women’s sexuality is fluid. When I hear the common phrase “sex sells” one thing comes to mind; scantily clad women who all look very similar (e.g., thin, tall, and with curves) selling products. And this definitely may empower some women. However, I don’t identify with those messages and don’t want to represent myself in that way. I wish there was more marketing that emphasized women’s intellect and competencies. I wish there would be less of an emphasis on our physical appearances.”
- Kate, Utah, 27

1. Natsal, 2015
3. SHE IS FIERCELY INDEPENDENT, BUT ALSO WANTS TO BE DEPENDENT

She is independent in that she wants to be free from outside control and does not want other people to direct her, but she does look to people and brands to support her on her terms. She is not looking for a brand to be her friend, but to understand her values, bring her pleasure, and alleviate anxiety about things she cares about like the environment, sexism, and unfairness. For brands, this extends to supporting women in hiring decisions to internal corporate structure.

The New Fashioned woman is very aware when a brand is faking it, with nearly half (41 percent) viewing corporate cause marketing as "just spin".

1.Digiday, 2016
She is also more “connected” and reliant on technology than any other generation – she spends 6.5 hours per week on social media alone, and 12 hours more per week on her smartphone than with her partner. She recognizes the role social media plays as a validating voice that mirrors back the struggles, joys and confusion of this unique time. But, she also sees its limitations and effect on her self esteem and in making her feel disconnected - women report higher levels of stress, anger, and anxiety when not with their phones. What the New Fashioned woman really craves is validating and empowering connections, sharing life and its meaning with her family, her friends and her partner. Increasingly, women are depending on each other, placing an emphasis on feminism and empowering other women with friendships, role models and mentors. She believes she has a bright future, but also has her insecurities and realizes she cannot do it alone.


When asked what is most important in their lives and what they could not live without 100 percent mention the importance of family & friends. Yet 80 percent also feel misunderstood by others including marketers, brands, and society in general. 90 percent of millennial women dislike large corporations, and yet they all realize they would like to depend on them and even love some of them – as long as they fit with their values and lifestyles.

“Stop trying to “empower” me by saying it. Some needs are understood and being addressed by small, emerging brands. Something big brands just can’t seem to do – they are likely burdened with hitting sales figures instead of thinking about how to serve the customer. I feel distrustful of major brands. I would choose a smaller brand over a big brand any day.”
- Crystal, New York, 30

“I need to tune into what makes me happy and focus on bettering myself and being there for the people that are important to me. I have realized I don’t need a million friends, it is all about having a few really true friends in my life. Quality over quantity. I value the quality time I spend with people over everything else.”
- Michaella, New York, 22
4. SHE FEELS IN CHARGE, BUT ALSO SEES OBSTACLES OUTSIDE HER CONTROL

There is an edge to the New Fashioned woman, an awareness, and a desire to do things differently. She does not feel like a rebel, but an “evolutionary”: she is evolving and growing. She’s inspired by possibility, is experimenting with life and wants to live outside her comfort zone – in fact, REI Adventures has seen a 60 percent increase in female travelers looking to explore abroad solo. She’s always looking to grow by taking on new challenges and experiences. This process of self definition also has to be convenient, on her own terms, and practical.

1. Conde Nast Traveler, 2017
She appreciates diversity of perspective and doesn’t judge others for their unique version of ‘ideal.’ She aims to be a change-maker in the world and make the world better even if that means needing to pick her work over marriage & children. This does not mean she doesn’t have or want to have a family - it is just that personal development, growth, and career are at the forefront. She is taking things into her own hands and believes she’s living at the precipice of social change. She’s committed to challenging herself, crashing through ceilings, and pushing boundaries. She’s got a lot of love to give, but even more that she wants to get done.

All that being said, she wants to be taken seriously in life and work, but sometimes finds that challenging. She wants to bring her true self to all situations, and not have to act like a shape shifter by morphing roles she plays depending on the situation. She is keenly aware of how her life is different from her male counterparts, the inequities that exist, and how she has to alter her behavior. She knows she still faces real barriers like sexism, job market challenges and student loans/debt etc. Although she is not fully financially independent as a result of these factors, she is making a conscious choice of investing in herself, her future and her passion, making a trade-off between near term and long term earning. She now earns more college degrees than men, and for the eighth straight year earns the majority of doctoral degrees. In line with her personality she remains optimistic despite experiencing fear and worry about what she can’t control.

1. US Department of Education, 2017
2. Council of Graduate Schools, 2017

100 percent of women stated that being non-conformist and finding their own path is important, but, they still want to feel like they belonged and can function in current society.

50 percent mention that ongoing learning & growing is a top value.

100 percent value career or pursuing a degree to have a career.
“I have many passions but I’d have to say that my biggest one is a sense for adventure of any kind - whether it be traveling, trying new foods, or participating in ridiculous athletic events. We have such short lives, and I think it’s important to do as much as you can in that time. I like to lead my life with the question ‘why not?’”
- Rashmi, California, 27

“I am constantly striving for personal growth and development. I spend a lot of time reflecting on who I am as a person, my strengths/weaknesses, and my thoughts and behaviors. I want to be a well rounded person and that takes conscious effort. I read a lot of self-help books to try and make sure I’m the best version of myself I can be.”
- Kate, Utah, 27

“I worry about my legacy. Because in the end that’s all there is. What will people remember after I die? What impact will I leave on this world?”
- Mason, Missouri, 30
5. SHE VALUES HOLISTIC WELLBEING, BUT STRUGGLES TO STAY HEALTHY

She realizes wellness is not singular. She fills her tank with a balance of healthy food, body movement, mental health, relationships, and spirituality. She realizes that being healthy can help destress and that benefits go beyond looking good. Nine in ten women pursue good health so they can be successful in other areas of life, and nearly half of women say healthy eating is a lifestyle choice as opposed to a goal-driven diet. These same women often struggle to fit healthy habits in with a hectic, fast paced life. As a result, she likes more realistic portrayals of women athletes, forms of fitness, body types and benefits.

1.Women’s Marketing, 2015
Over 60 percent state that health and holistic wellbeing are essential and yet struggle to find time and energy to do so.

“Staying healthy and fitness are very important to me. I want to live a life free of preventable diseases, and I overall feel much better when I can eat healthy food. Happiness/mental health is important to me because I know that school and life can be very stressful. I want to maintain a mentally healthy lifestyle and stay strong.”
- Sara, Massachusetts, 21

The New Fashioned woman also connects health to the environment, a sustainable planet and people – it’s about long term investment in mental and physical well-being and the energy to be strong, powerful, and able to give to others.

The New Fashioned woman recognizes that at times, it’s important to put her needs above others/the world’s and prioritize self care, whether through a digital detox, self study, or wellness retreats. She takes time to identify what works for her to recharge and regain energy, and seeks to develop a whole understanding of self.
Brands will win when they **BUILD LIKE A WOMAN**, meaning truly listening to what New Fashioned Women want and value, understanding their paradoxes, and building brands like and for them. And the good news is New Fashioned Women gravitate toward brands who are willing to admit that the current way isn’t working, and who are brave enough to do something new, better, and different for them and the world.
WHAT WOMEN WANT, IN THEIR WORDS

“Marketing to my generation is not easy – we can be a bit of a moving target, and at the same time adamant about our somewhat overlapping passions and distastes. We care about the things that matter to us, and not so much about ad campaigns. We want things to be nuanced, more intricate, more meaningful and more personal. We’re tired of being seen as a generation that is all about fluff and shiny things, when we’re really about grit and passion and working hard for what we want. We want to live in a society that sees us and makes space for us.”
– Mason, Missouri, 30
FOR ME

ALLEVIATE PAIN
I’ve got a lot of fear and worry, so anything you can do to help solve problems or reduce pain points in my life is greatly appreciated.

GIVE PLEASURE
Develop products I like or do something good for me.

BE WELLNESS-FIRST
Don’t give me anything that will harm my health. If you have a trusted role in my life, I have to believe you would not put harmful chemicals or additives into your products which could in any way hurt me.

DO NOT DEFINE SEXUALITY
Understand that my sexuality is my own, and that there is great variability in women’s sexuality. Move away from advertising that solely sexualizes women. There are more creative ways to sell a product. Show women as powerful, hardworking, strong beings with purpose – rather than just frilly, cute princesses or over-sexualized characters.

GET SOCIAL
Engage heavily and authentically on social, but don’t make it so obvious that social is managed by a bunch of uncool 40 somethings – I’ll be able to tell.
BE MISSION-ORIENTED
It’s important that I see you stand for something and that you don’t back down. I want to know the story behind your brand beyond increasing sales.

BE DISRUPTIVE
I’m looking for a brand that isn’t afraid to break the rules, think big, take on issues head on and fight back when needed. A brand that isn’t concerned with the status quo.

BE INNOVATIVE
Approach business with the same curiosity, experimentalism, and fearlessness as an entrepreneur would.

BE GENUINE
Nothing grinds my gears more than marketers who are trying to manipulate me into buying something. Sales are important but treat your consumers with respect and be honest. Give your honest opinion about products and make the people that work in your company real to me.

DO YOUR RESEARCH
If you have a new commercial or campaign that is edgy and potentially controversial, please do the proper vetting necessary to gain consumers’ opinions before launching it. This will save you a lot of headaches down the line.

RECOGNIZE MARKETING POWER
Advertisements have a lot of potential for being creative and impactful. Embrace your platform and medium to tell me something new and inspiring - something that makes me think.

FOR US

GRAYCE & CO
FOR THE WORLD

BE ECO-FRIENDLY
Corporations need to be more concerned with environmental health, understand the effect of commercialization on our planet and take action. This is a must-have, not a nice-to-have.

GIVE BACK
To the earth, to your employees, and to your customers. Realizing that you can do so much more than sell your product tells me that you’re not only successful, but that you have the time and resources to spend on others. If I see that you’re doing that (and marketing things that way too), I am likely to go out of my way to buy from you.

HIRE WITH DIVERSITY IN MIND
Diversity of background, skillset, gender, race, country, thought. Have many different opinions and perspectives on projects. People have such complex identities it is important to understand these dynamics among teams, hiring practices, conversations at work, and in campaigns or commercial ideas.

STRUCTURE FOR DEVELOPMENT
Certain opportunities may seem atypical for “business”, but are important such as advocacy or development courses. Great marketers are psychologists, anthropologists, sociologists, business people, and critical theorists.
BRANDS THEY LOVE

Glossier.  KIND  amazon  REI  patagonia  WARBY PARKER

AWAY  lyft  CLASSPASS  HARRY'S  Casper  TOMS

DIFF  Playtex  Dove  Apple  THE NORTH FACE  TRADER JOE'S

TARGET  NORDSTROM  Pantene  Mrs. MEYER'S CLEAN DAY  NETFLIX  BURT'S BEES
TO EXPLORE HOW TO DRIVE MORE VALUE WITH MILLENNIAL WOMEN FOR YOUR BRAND

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