

# TRENDCAST

Forecasting cultural trends  
with economic modeling

## THE CULTURE OF RECOVERY

FALL | 2013

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For more information on the 2013 TRENDCAST Report, or to find out how Gotham Research Group's work can be customized for your organization's needs, please contact: Jeffrey Levine, Ph.D. or Estep Nagy at: [trendcast@gothamresearchgroup.com](mailto:trendcast@gothamresearchgroup.com) or call 646-706-5231. [GothamResearchGroup.com](http://GothamResearchGroup.com)

The Gotham TRENDCAST Syndicated Report is a cultural trend forecast that provides organizations with the information they need to anticipate where the American consumer is likely to be in the next one to three years.

This enables companies to make profit-enhancing decisions based on empirical information rather than guesswork.

The TRENDCAST model delivers findings with immediate business applications for long-term corporate planning, strategic positioning, product development, and advertising and marketing strategy.

The Fall 2013 TRENDCAST Report identifies the dominant cultural forces that determine the likely resonance and appeal of:

- Movies
- Television
- Advertising/marketing strategy

The Gotham TRENDCAST is a proprietary model that predicts the relative performance of cultural themes in the U.S. population using historical economic indicators, in-depth cultural analysis, and ongoing primary research.

THE MODEL EMPLOYS:



TRENDCAST  
Economic Model:

A modeling process that includes both objective economic conditions as well as a range of subjective consumer experiences.



TRENDCAST Cultural Index:

Incorporating a range of cultural inputs analyzed using our proprietary coding frame.



Gotham's S-Net Focus Groups:

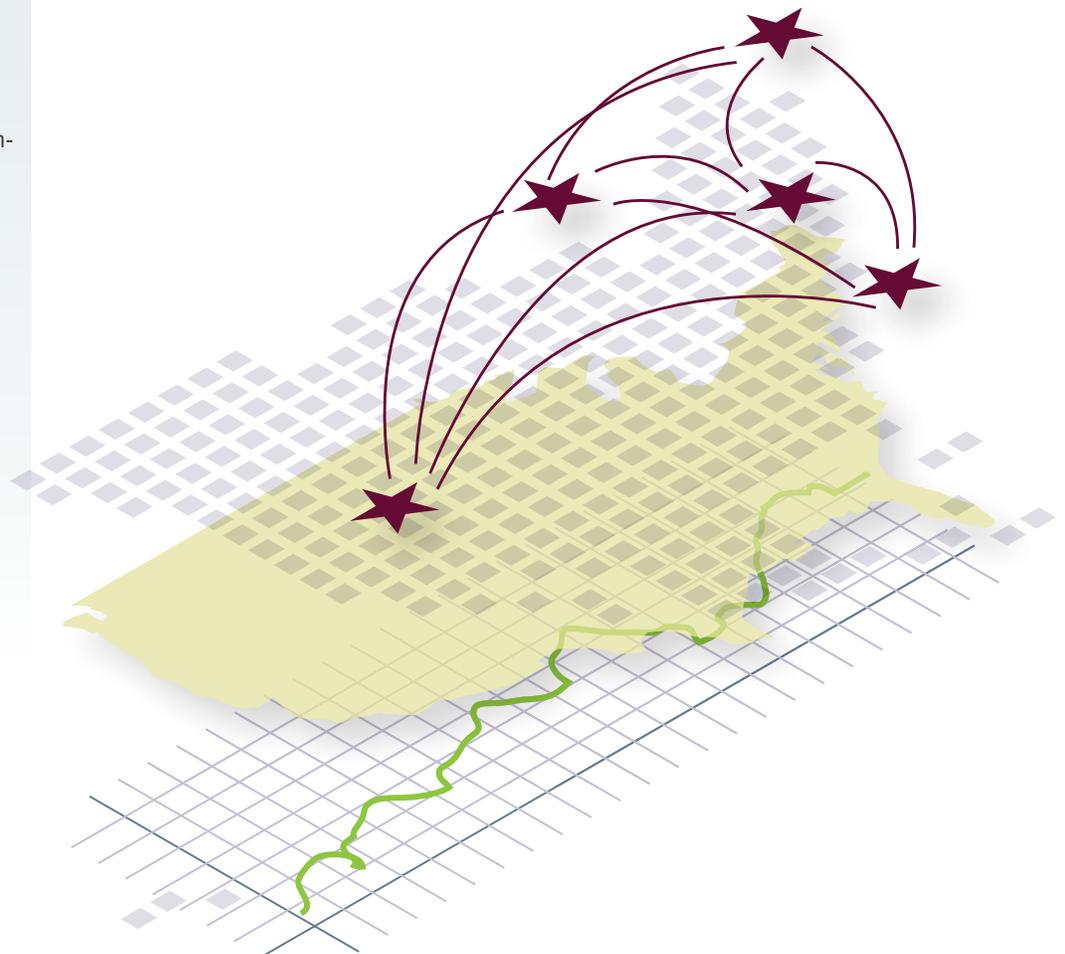
"Naturally-occurring" focus groups, consisting of consumers and their real-life circle of discussion partners.



Gotham's Opinion  
Leader Index:

Identifying the consumers who have a disproportionate influence on perception and behavior in the population.

1. The economic climate drives cultural trends.
2. Cultural trends are especially influenced by economic crises.
3. Economic crises fundamentally change the themes that succeed with consumers.
4. We can look to *other post-crisis periods* to see which themes will succeed today.



Our analysis reveals three basic stages of recovery:

### STAGE 1: **Crisis Period**

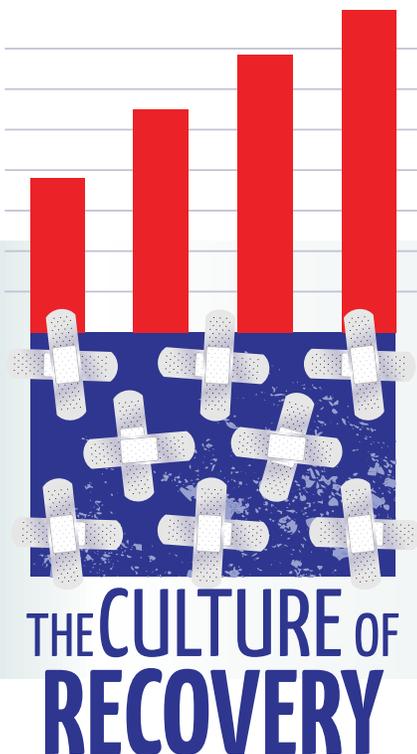
- Sharp/fast drop in S&P, Strong peak in dissatisfaction in Right direction/Wrong track
- As seen in 1973-1974 and 2008-2009, per our 2011 TRENDCAST

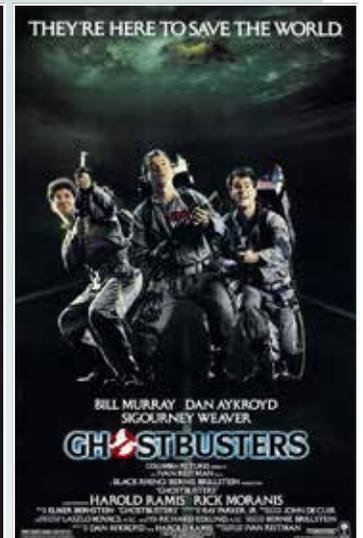
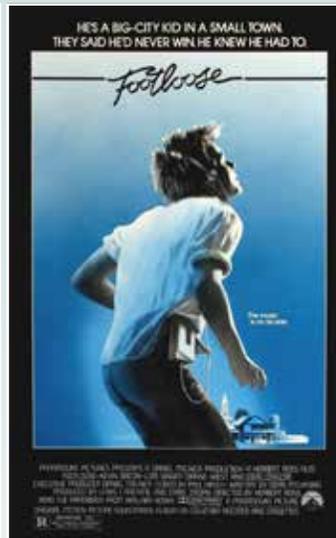
### STAGE 2: **Culture of Recovery**

- Recovery of S&P to pre-crisis levels; Housing starts double from lows; Consumer confidence (UMich) =75+ (with one-year lag)
- As seen in 1982 and 2013, per our 2013 TRENDCAST

### STAGE 3: **Cult of Success**

- S&P = 3x the crisis low point; Consumer confidence (UMich) 90+ at least 1 year
- As seen in 1985 and ???





## WHAT'S COMING:

We expect the following cultural themes to outperform as the theme of recovery begins to take root in the national psyche in 2013-2015, as it did in 1983-84:

- 1 The tone darkens, even in comedies.
  - The stakes are high -- even apocalyptic -- for the hero's community, society, or the world.
- 2 Idealism is essential.
  - Despite the dark context, old-fashioned ideas of loyalty, trust, hard work, and optimism are in – not cynicism.
- 3 Heroes are outsiders.
  - Achievement is not dependent on the approval of society – and it often happens in spite of it.
- 4 Success always involves cooperation.
  - Lone wolves do not win; success requires help.
- 5 Hard work pays off.
  - Discipline and persistence – as opposed to 'natural' talent – are especially valued.

These themes outperformed in the Crisis Period, and we see them continuing to be strong.

- 1 Key community values – specifically teamwork – still resonate.
- 2 Technological and logistical ingenuity outperforms.
- 3 Conspicuous consumption is still a no-no.
- 4 The establishment is still evil.

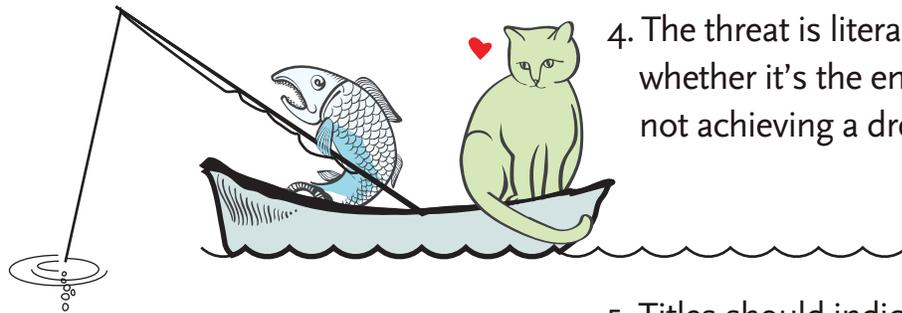
#### THE CRISIS PERIOD LIVES ON

- Avengers Box Office (US): \$623 million
- 3+ protagonists form a team, sacrifice themselves for the greater good.
- They make themselves and others better through technological ingenuity.
- The antagonist is a god/king and therefore rich and powerful – which means evil.



The TRENDCAST model predicts that the following specific story and marketing elements will outperform in 2013-2015 as in 1983-1984:

1. Protagonist(s) are explicitly fish-out-of-water – and they overcome the hostility of an unfeeling society.
2. One-on-one relationships are the most powerful – so the central protagonist unit is two people who are not family.
3. Learning cooperation — to trust a non-family member, romantically or otherwise — is a key part of the protagonists' journey.

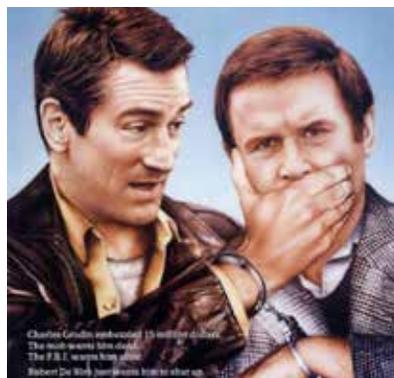
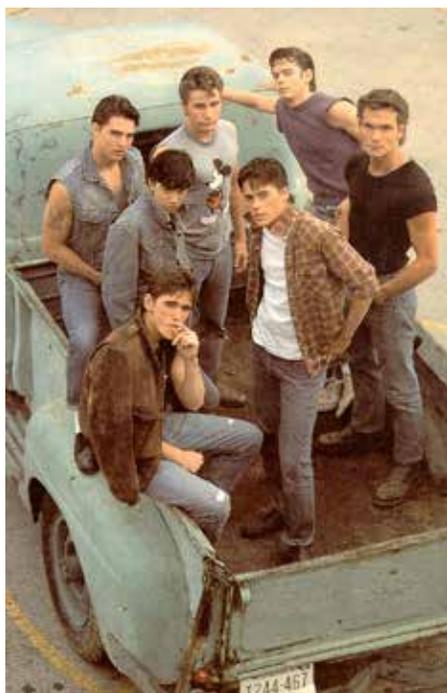
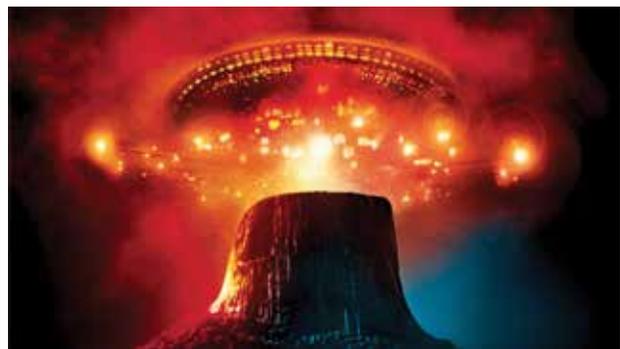


4. The threat is literally earth-shattering for the protagonist, whether it's the end of the world, losing a livelihood or not achieving a dream.

5. Titles should indicate or reinforce the outsider status of the protagonist(s).
6. All protagonists are idealists, while their milieus are cynical, corrupt, and display bad faith.
7. Protagonist(s) must learn entirely new skills – through hard work and sacrifice – to succeed.
8. Stories are based in recognizable reality – fantasy feels thin in this environment.
9. Heroes inventing new things, systems and processes to combat evil.

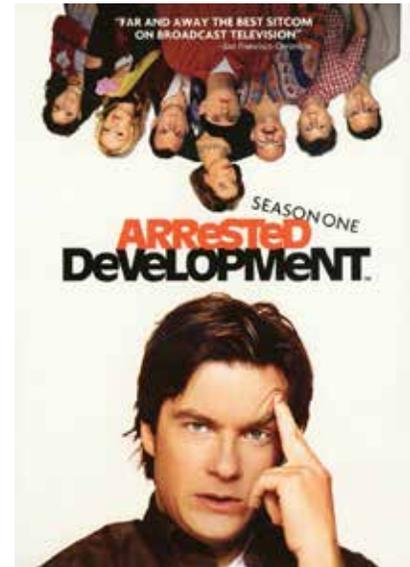
Movies that Would Outperform/underperform in 2013-2015:

Movies that would Outperform/Underperform in 2012-2013		
▲ Outperform	▼ Underperform	Why?
The Secret of NIMH	The Rescuers	Darker tone = better.
Midnight Run	The Godfather	Protagonists come in pairs, not gangs/families.
The Outsiders	Rumble Fish	Title should communicate fish-out-of-water.
Breakfast Club	Sixteen Candles	Protagonists win by exchanging skills.
Close Encounters	Wall Street	Success is based in idealism.



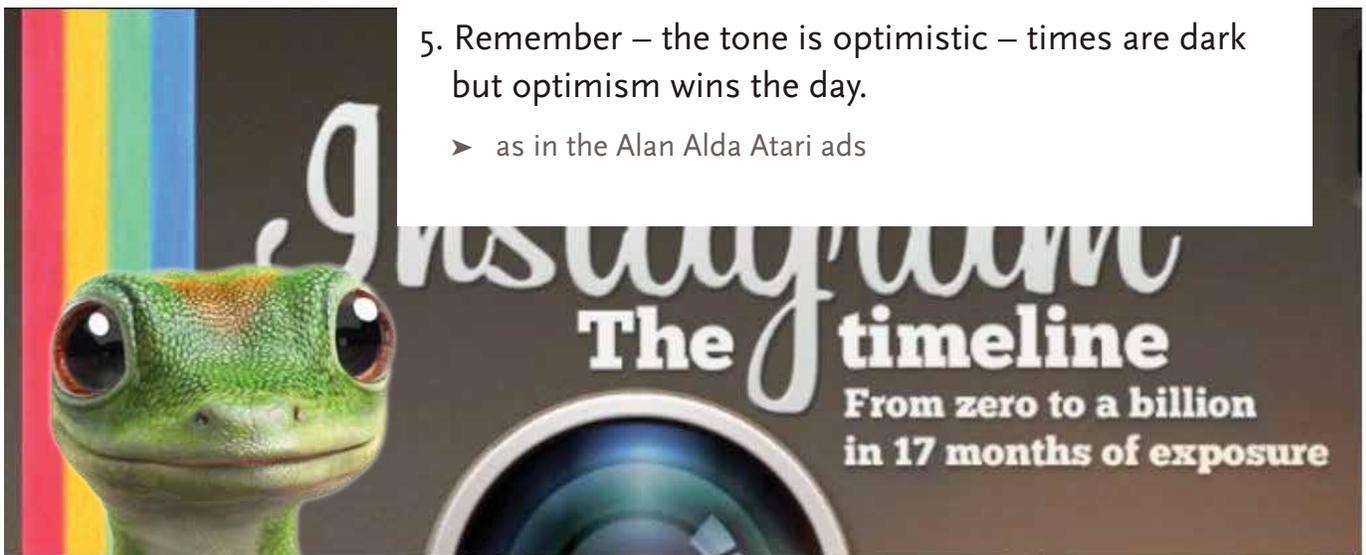
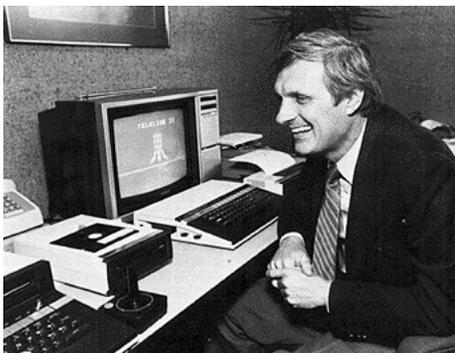
Television that Would Outperform/underperform in 2013-2015:

Movies that would Outperform/Underperform in 2012-2013		
▲ Outperform	▼ Underperform	Why?
Batman (w/Robin)	Superman	Protagonists succeed as part of a pair.
Burn Notice	The West Wing	Outsiders beat insiders.
Arrested Development	Cheers	Protagonists must learn <b>entirely</b> new skills.
Amazing Race	Survivor	Success comes from teaming up, pooling knowledge.
L.A. Law	Damages	Protagonists are idealistic, not cynical.



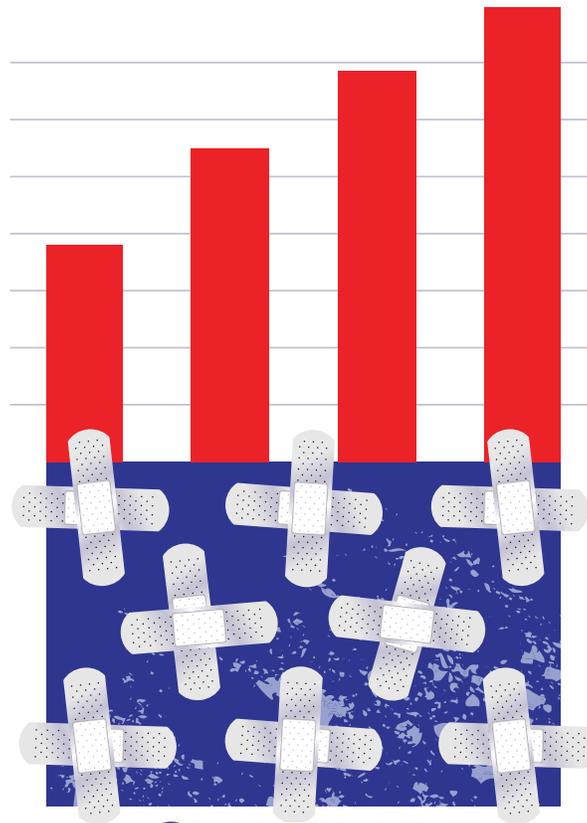
The TRENDCAST model predicts that the following advertising/marketing elements will outperform in 2013-2015 as in 1983-1984:

1. Sharing with friends – not necessarily family – is a potent theme, both digitally and not.
  - YouTube and Instagram – not Facebook (parents and grandparents are on Facebook)
2. Us-against-the-world theme outperforms dramatically.
  - as in Apple 1984 commercial
3. Everyone needs a ‘wise friend’, the person who shares the new knowledge that makes all the difference.
  - the Geico Gecko
4. Show the work – emphasize the work and sacrifice that went into the product.
  - Inspiration is assumed; people want to see perspiration.
5. Remember – the tone is optimistic – times are dark but optimism wins the day.
  - as in the Alan Alda Atari ads





**GOTHAM**  
research group



# THE CULTURE OF RECOVERY

## TRENDCAST

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