

Nielsen's Women of Tomorrow

NEW YORK, US: Women across the globe believe they have greater opportunities than their mothers... women in developed markets believe outlook different for their daughters... women prefer to get information about products on TV... quality most important driver of brand loyalty.



Women's control over spending decisions coupled with their gains across the working world and politics, point to women of tomorrow being in a position to exert more influence than ever.

Nielsen, a leading provider of insights into what consumers watch and buy, today released findings from a study that identified spending and media habits of women across continents.

According to the study, which spanned 21 developed [1] and emerging [2] countries, while women across the globe are stressed, women in emerging markets are more stressed than those in developed countries. And, while women across countries surveyed believe they have greater opportunities than their mothers, women in developed markets believe their daughters have the same level of opportunity.

The Nielsen [Women of Tomorrow](#) study is one of the most comprehensive examinations into what women watch and buy. The survey was fielded using an online methodology in developed countries and a mixed field approach of online, central location and door-to-door interviewing in emerging countries, February - April 2011.

"Women across the globe are achieving higher levels of education, joining the workforce in greater numbers and contributing more to the household income," said Susan Whiting, vice chair, Nielsen. "Women are increasing their spending power, and with that they gain more control and influence over key household decisions. As a result the women of today and tomorrow are powerful consumers and understanding their habits and attitudes is critically important for marketers and advertisers."

Empowered yet stressed

Nearly 80% of women in developed economies indicated they believe the role of women will change and of those, 90% believe it will change for the better. While female respondents say they are pressured for time and feel stressed and overworked, women in emerging countries indicated they feel the pressure even more so than women in developed countries do. Women across the world are managing multiple roles, but a contributing factor in the higher stress levels reported by women in emerging markets is that there is little spare cash remaining after the basic essentials to spend on themselves or take vacations.

Among female respondents in emerging markets, women in India (87%), Mexico (74%) and Russia (69%) said they were most stressed/pressured for time; while among developed countries, women expressed feeling this pressure most in Spain (66%), France (65%) and Italy (64%).

"Women tell Nielsen they feel empowered to reach their goals and get what they want, but at the same time

this level of empowerment results in added stress," said Whiting. "Companies marketing to women should consider highlighting ways their products can ease stress and provide convenience."

Extra funds, different allocations

When asked how women expect to allocate additional money they earn or expect to earn over the next five years, differences emerge. More than half (56%) of women in emerging countries said they plan to allocate funds for their children's education, contrasted to 16% of women in developed countries. Women in Niger (85%), India (76%) and Malaysia (63%) gave the most importance to saving for their children's education.

Overall, developed market women said they plan to spend their extra money on vacations (58%), groceries (57%) and savings or paying off credit cards/debts (55% each) while emerging market women said they were looking to spend extra money on everyday essentials such as clothing (70%), groceries (68%) and health and beauty items (53%). In emerging markets, vacation ranked seventh among women, with 40% indicating they would spend extra money on it.

A plateau of hope

Across countries surveyed, women believe they have more opportunities than their mothers do. Women in emerging markets believe their daughters will have even more opportunities than they did relative to their mothers. However, in developed countries, women surveyed believe their daughters will have the *same* opportunities, not more.

Less than half (40%) of women in developed countries surveyed believe their daughters will have greater financial stability while 54% believe their daughters will have a better education. In addition, 34% believe their daughters will be less likely to retire when they choose to compared to today's standards. Nearly three-quarters (74%) of female respondents in developed countries, however, believe their daughters will have better access to technology.

In emerging markets, 80% of women surveyed believe their daughters will have greater financial stability, 83% believe their daughters will have a better education and 84% believe their daughters will have better access to technology.

"The difference in perceptions is striking, and reflective of the belief that women in developed countries have achieved a certain level of attainment and success," said Whiting. "While women in emerging markets see tremendous growth in the opportunities for their daughters, a plateau of hope is evident in developed countries."

In the know

Nielsen found that the number one place women across continents prefer to get information about new products is television. In 10 of 10 emerging markets and in seven of 11 developed countries analysed, television outranked 14 other sources of information. (In Germany and Spain word-of-mouth placed higher than television; in South Korea, Internet searches ranked highest; in Sweden, direct mail.)

After television? Word-of-mouth was listed as either the second or third choice in nine of 10 emerging markets and in eight of 11 developed markets. When it comes to getting information about stores, however, women surveyed in developed countries prefer word-of-mouth while women in emerging countries indicate they rely on TV.

"Worthy of note, is the disparity between the first and second information-seeking choices between women in emerging and developed countries for both new products and new stores," said Whiting. "In emerging countries, the gap between TV and all other choices is significant, but in developed countries other media vehicles are increasing in importance - a critical marketing consideration when balancing strategic media plans."

Quality drives loyalty

The most important driver of brand loyalty in 20 of the 21 countries examined, across 12 factors and across generations, is quality. (Women in the United Kingdom cited trust ahead of quality.) Additionally, Nielsen found that the most important drivers to bring women into the store (for products such as food, beverages, health and beauty products, pharmaceuticals and electronics) was good value and quality products.

"Women tell Nielsen that quality, not price, drives long-term brand loyalty," said Whiting. "Though price and value are important, particularly to attract an initial purchase decision, marketers need to take note that long term positioning must emphasize quality to earn her trust."

Make it social, make it relevant

Nielsen reports that women talk 28% more and text 14% more than men every month; they are also heavy users of social features of phones and visit more Internet community sites than men. In addition, more than half of women in both developed (average 56%) and emerging (average 71%) countries say the computer, mobile phones and smart phones have changed their lives for the better.

Social networking is a fundamental part of a woman's day-to-day digital life, with 65 - 70% of active, online female users age 18 plus in developed markets such as Australia, France, Italy, South Korea and Brazil visiting the leading social networking site in their market. In the US, 73% of online women visit the leading social networks while in Germany, 50% visit.

"To connect with women, strategies should be social **and** relevant," said Whiting. "With social networking, women typically follow brands more so than men, making the social networking tool relevant for discounts, deals and coupons. Women are much more likely to engage with media that seamlessly integrates into an improves their day-to-day lives."

Other key findings

When Nielsen compared results of the Nielsen Women of Tomorrow Study to its Q1 Global Online Survey [3] it also found:

- Across 22 forms of advertising "recommendations from people you know" is by far the most trustworthy advertising source for women surveyed in developed (73%) and emerging (82%) countries, followed by branded websites (60%, emerging countries) and consumer online opinions (49%, developed countries).
- Women in emerging markets are more highly influenced by web ads shown on social media sites than those in developed countries. In emerging countries, women in India were the most highly influenced by web ads and women in South Africa and Russia were least persuaded. In developed countries, respondents in South Korea were most moved by social advertising and women in Australia and France were most impartial.

- When it comes to life decisions, women respondents in developed markets want shared responsibilities on all matters from child care to major purchases. In emerging markets, some traditional roles continue, yet there is a desire for shared responsibility. Men in emerging countries are still viewed as the primary decision-making stakeholders when it comes to purchasing home electronics or cars, while women rule in the health and beauty department and all child care matters.
- Across countries surveyed, some traditional sentiments remain: 31% of both men and women believe that men are the best fit to hold political office, maintain workplace positions of authority (29%) and make major purchases (22%).

"The next generation of female consumers will shop and use media differently, from men and generations before them," said Whiting. "Consequently, companies marketing to women and working to capture women's attention must rely on informed insights rather than assumptions about how they do business with this influential consumer."

About The Nielsen Women of Tomorrow Study

The Nielsen Women of Tomorrow Study was conducted between February and April 2011, polling nearly 6500 women in 21 developed and emerging countries throughout Asia Pacific [4], Europe, Latin America, Africa and North America. The sample was fielded using an online methodology in developed countries and a mixed field approach of online, central location or door-to-door interviewing in emerging countries. The margin of error is ± 2 points. The countries in the study represent 60% of the world's population and nearly 80% of the GDP.

[1] Developed countries: United States, Canada, United Kingdom, Italy, France, Germany, Spain, Sweden, Japan, Australia, South Korea.

[2] Emerging markets: Turkey, Russia, South Africa, Nigeria, China, Thailand, India, Malaysia, Mexico, Brazil.

[3] Nielsen compared results from the Nielsen Women of Tomorrow Study to the same 21 countries in the Nielsen Q1 Global Online Survey. The Nielsen Q1 Global Online Survey was fielded March 23 - April 12, 2011.

[4] The study was fielded before the 2011 Japan earthquake and tsunami.