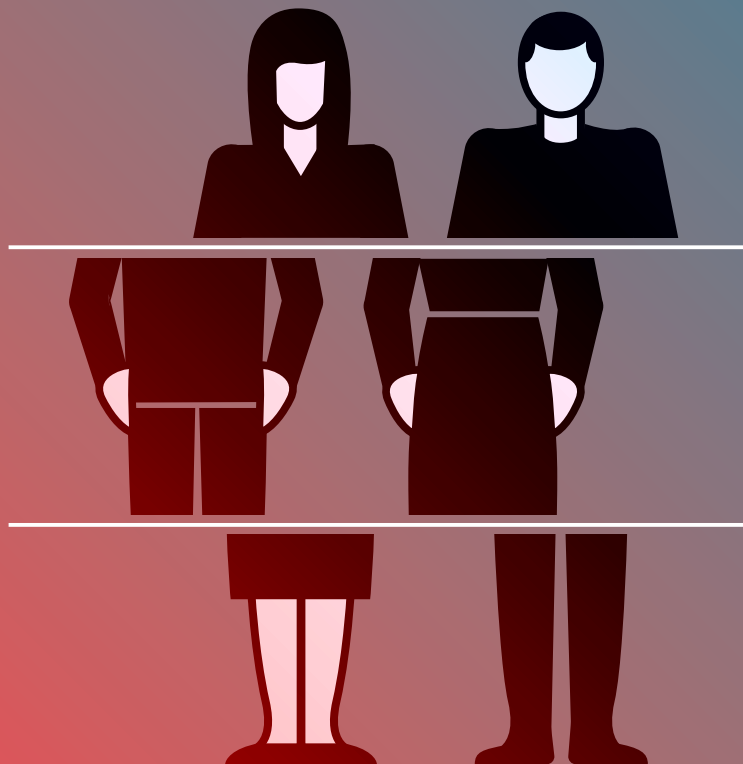


Prosumer Report

HAVAS



# The Future Is FeMale

# ABOUT THE STUDY

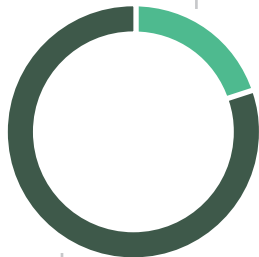
In March/April 2017, Havas partnered with Market Probe International to survey 12,168 men and women ages 18+ in 32 markets:

Argentina, Australia, Belgium, Brazil, Cambodia, Canada, China, the Czech Republic, Denmark, Ecuador, France, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Myanmar, the Netherlands, the Philippines, Poland,

Portugal, Russia, Saudi Arabia, Singapore, South Africa, Spain, the United Arab Emirates, the United Kingdom, and the United States.



The survey sample was made up of **21%** leading-edge **PROSUMERS**



and **79% MAINSTREAM** consumers.

## Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They've been a focus of Havas studies for more than a decade. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

Learn more at [mag.havas.com/prosumer-reports/](http://mag.havas.com/prosumer-reports/).



**MILLENNIALS**  
ages 18–34



**GEN XERS**  
ages 35–54



**BOOMERS**  
ages 55+

Prosumer and mainstream respondents are segmented into the above generations.

Due to rounding, some figures do not add up to 100%.

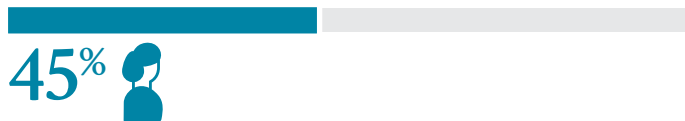
# LAGGARDS OR LEADERS?

A few years ago, there was a lot of talk about our now living in a *postfeminist* or even *postgender* society. And yet feminism and gender arguably are even bigger talking points now than a decade ago. Significant gender gaps continue to exist worldwide—in pay, in political power, in C-suite composition, in the lucrative and fast-growing tech industry, and beyond. Women in most parts of the world have made great strides in education and earning power, but inequalities persist, despite a spate of studies that show that the advancement of women is critical to the success of nations and businesses alike.

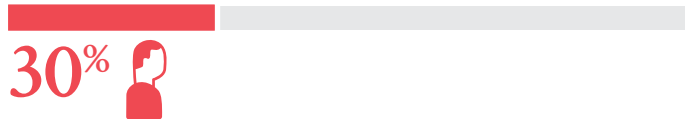
On the flipside of these inequities is the burgeoning sense that the future belongs to women—both because the so-called “softer” skills traditionally associated with females (e.g., collaboration, flexibility, good communication) are more valued today and because females are perceived as more intent on creating change. Nearly half the women (45%) and Prosumers (44%) we surveyed around the globe agree that it will be women who lead change in the world. Around a third of men (30%) and 4 in 10 millennials said the same.

In the future, it will be women who will lead change in the world

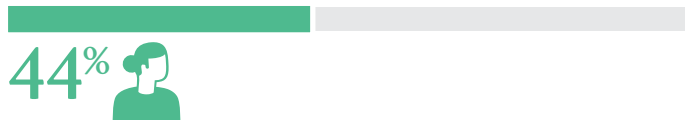
## FEMALES



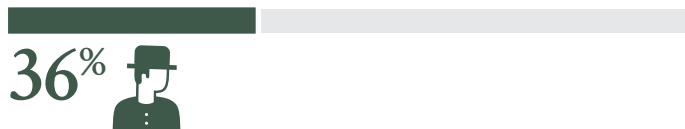
## MALES



## PROSUMERS



## MAINSTREAM



% AGREEING STRONGLY/SOMEWHAT

# So, which is it? Are women forever to be the subordinate sex, or are they the face of the future?

We undertook this study to find out how much has changed in society's attitudes toward gender and gender equality. In this report, we share 12 broad insights:

- |    |                                            |    |     |                                                 |    |
|----|--------------------------------------------|----|-----|-------------------------------------------------|----|
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| #2 | NEVERTHELESS, MISOGYNY PERSISTED           | 8  | #8  | RELATIONSHIP STATUS: FLEXIBLE                   | 27 |
| #3 | "EQUALITY" MAY NOT<br>BE WHAT PEOPLE SEEK  | 10 | #9  | A NEW VIEW OF GENDER                            | 31 |
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| #6 | SINGLE WORKPLACE,<br>DOUBLE STANDARD       | 19 | #12 | ADVERTISING IS OUTDATED                         | 39 |

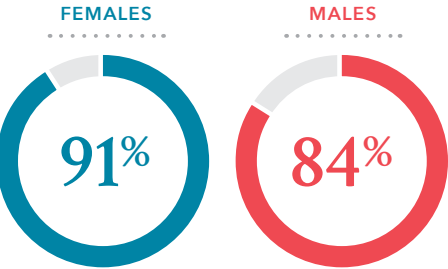
## INSIGHT #1:

# THE “F” WORD

Two data points from our study immediately stood out for us: The first is that the vast majority of respondents in the 32 countries surveyed—91% of women and 84% of men—believe that men and women should receive equal pay for doing the same job. What was a pretty big sticking point during the women’s rights movement of the 1970s is now a widely held belief. And yet less than a quarter of our global sample—only 31% of women and 17% of men—claim to be feminists. Why the disconnect? Why are so many people willing to support equal pay for women while rejecting the label of feminist? Even Angela Merkel, one of the most powerful women on the planet, **balks** at the title.

In our view, much of the dissonance comes from the fact that *feminist* has become a loaded term, meaning pretty much whatever the user desires. Whereas many people equate *feminism* with nothing more than the advocacy of women’s rights and a belief in the equality of the sexes, others perceive something much farther reaching and more nefarious. The two most upvoted definitions of feminism on UrbanDictionary.com adhere to the latter point of view. According to their authors, feminism can best be described as “a movement that seeks superior rights and privileges for women while hiding under the guise of ‘equality’” or “a relentless political advocacy group pushing for special privileges for women.”

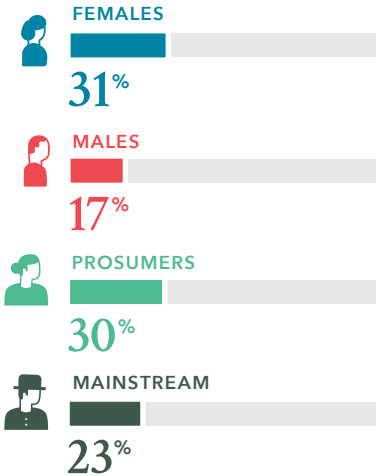
Women and men who work in the same positions should be paid the same



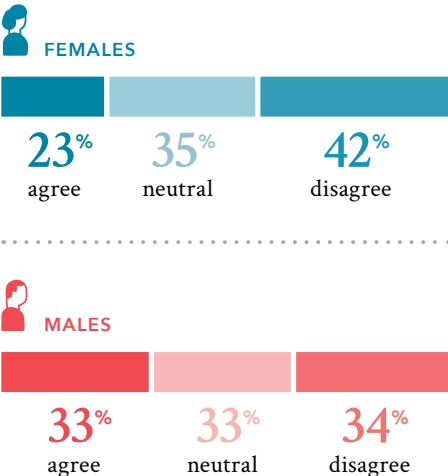
% AGREEING STRONGLY/SOMEWHAT

When we asked respondents whether feminism has done more harm than good in society, only a third of men and around a quarter of women said yes. However, only 34% of men and 42% of women *disagreed* with the statement, while more than a third of the sample

I am a feminist



Feminism has done more harm than good

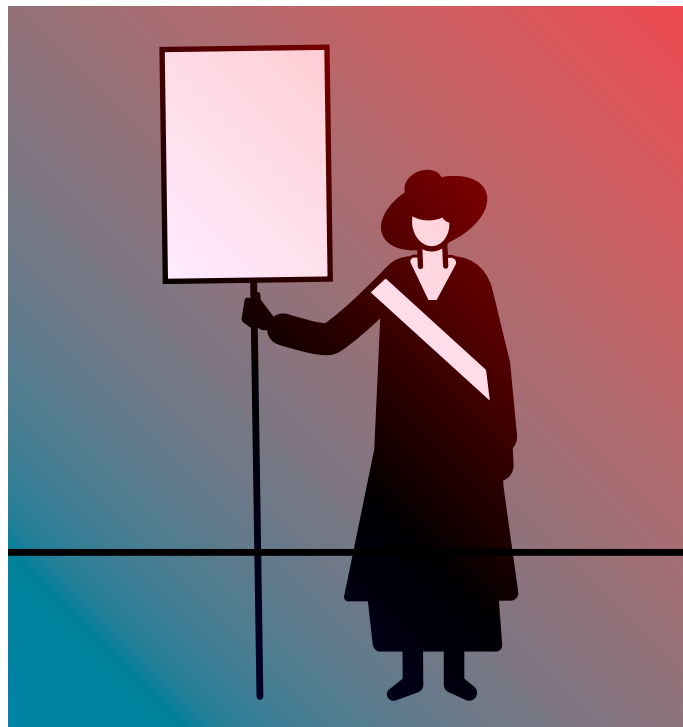


submitted a neutral response. So it's safe to say that people (men especially) are very much split on the question of whether feminism has been a benefit or detriment to society overall.

For many, *feminism* has moved beyond its preliminary goal of securing basic rights for women—voting rights, the right to own property, the right to an education, the right to work outside the home; in most parts of the world, these rights have been secured for and by women. Now the movement is seen to be about something more holistic. Modern-day feminists want women to have an equal number of seats at the table, to be able to help set the agenda (social, political, economic) and push society in a better direction, however each individual and organization defines that. This desire for a more equitable power structure is considered a threat by those satisfied with the status quo—male and female alike. And so even many people who support women's rights are reluctant to lay claim to the term *feminist*.

Feminism as a political force is waning today because it has been eclipsed by an even more powerful battle: progressive versus conservative. Consequently, a divide has grown between self-identifying feminists who envision a more progressive future and more conservative women and men who don't wish to see large-scale sociopolitical change. What divides these voters is not gender or even gender issues, but the totality of what they believe in, their vision of the world in which they want to raise their families, and what problems they most urgently want their political leaders to address. For anyone who doesn't fully embrace progressive ideals, *feminist* has become a term that represents people farther to the left of the

political spectrum. It was a moniker that made sense at a time when women of just about all political persuasions were seeking the most basic rights, but it now seems overdue for an update.



## INSIGHT #2:

# NEVERTHELESS, MISOGYNY PERSISTED

In 1991, the US Department of Energy hired teams of male scientists to imagine potential breaches of nuclear waste sites and find ways for future generations to avoid them. One of the teams envisioned a “**feminist world**” circa 2091:

*Women dominated in society, numerically through the choice of having girl babies and socially. Extreme feminist values and perspectives also dominated. Twentieth-century science was discredited as misguided male aggressive*

*epistemological arrogance. The Feminist Alternative Potash Corporation began mining in the WIPP site. Although the miners saw the markers, they dismissed the warnings as another example of inferior, inadequate, and muddled masculine thinking.*

In the scenario above, extreme feminists rejected knowledge and facts as masculine traits and instead prioritized emotions and feelings, dooming the world as a result. **KABOOM!**

There is no doubt we have made progress since that scenario was envisaged. The fear of extreme feminism presumably is chipped away a bit each time a woman becomes a head of state and fails to unleash an army of Amazonian clones. That’s not to say, however, that men are no longer concerned about the specter of women in power. A **2008 survey** by TV channel DMAX revealed that a majority of men in the UK believe they are now forced to live according to women’s rules. Eight years later, this theme of empowered women and emasculated men was in full view during the 2016 US presidential election, with much of the discourse revolving around the **forgotten white men** (often blue-collar) who fear they are losing their status as the dominant group.

One needn’t look far to find evidence of men rankled by women “infringing” on their sacred domains. Earlier this year, the US Senate majority leader invoked a little-used rule to silence a female senator during a confirmation hearing. His accompanying words raised

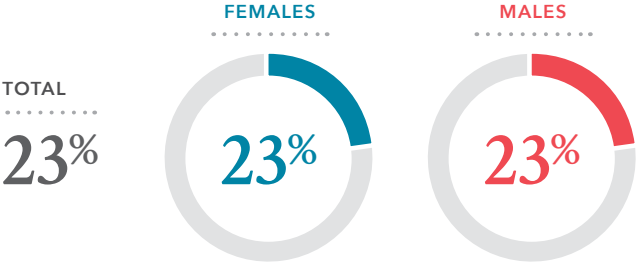


the hackles of women across and outside the country: “She was warned. She was given an explanation. Nevertheless, she persisted.” It didn’t take long for “Nevertheless, she persisted” to become a rallying cry—emblazoned on T-shirts, mugs, and even body parts.

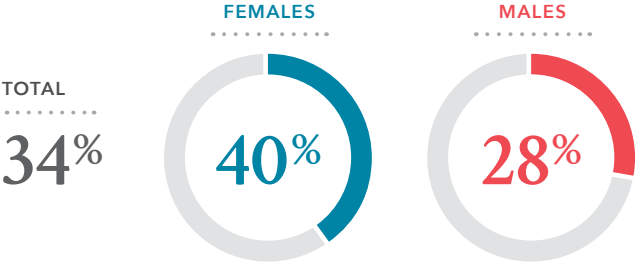
Clearly, some people see gender power as a zero-sum game and believe that every step women take forward pushes men one step back. But that is far from a majority opinion. In our survey, just under a quarter of men and women agreed that women’s emancipation has caused men to fall behind (although that figure rises to 49% in Russia and 51% in Cambodia). This isn’t to say, however, that resentment

doesn’t exist. A third of our global sample say they are seeing a lot more anger toward women nowadays. And agreement levels are substantially higher in some of the more traditionally male-centered societies in our survey. A majority of respondents in Italy (61%) and Cambodia (52%), as well as near majorities in India, Saudi Arabia, the UAE, Argentina, and Brazil, report increased anger toward women in their nations. It would be difficult to quantify the extent to which misogyny has increased overall, but it is certainly widely evident online—in social media posts, on [blogs](#) and websites, and in comment sections. So even if the term *feminist* has fallen out of favor, the fight very much continues.

Women’s emancipation has caused **men** to fall behind

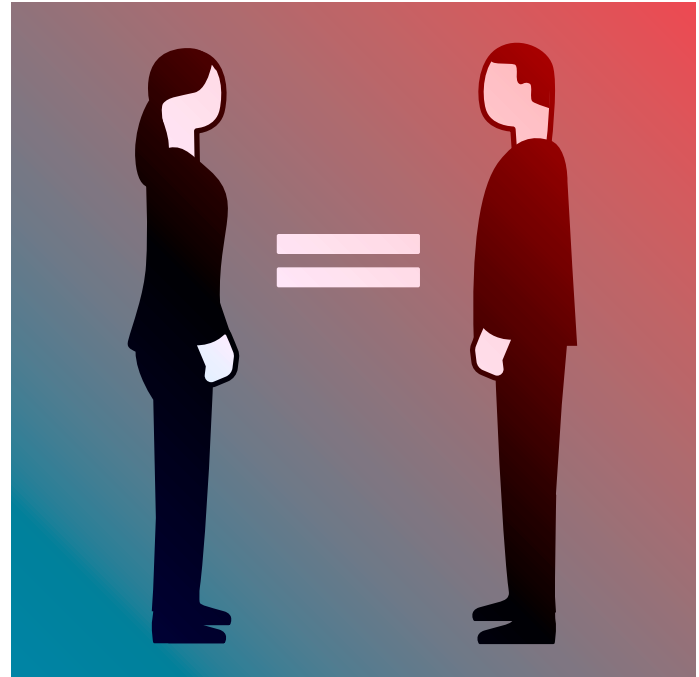


I’m seeing a lot more anger toward **women** these days



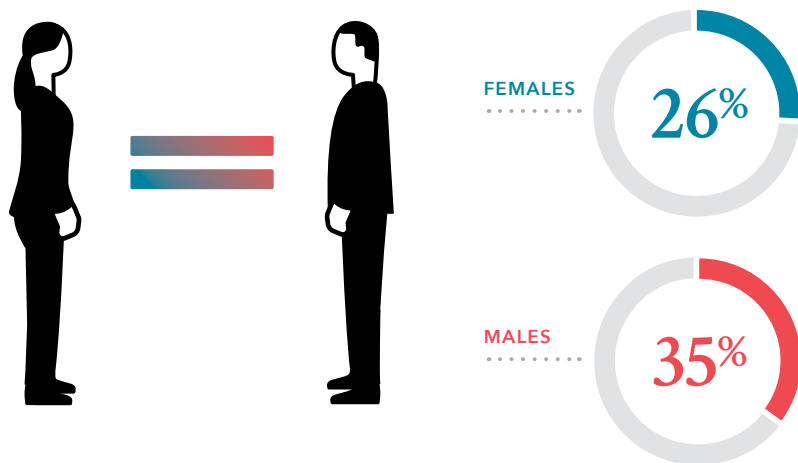
## INSIGHT #3:

# “EQUALITY” MAY NOT BE WHAT PEOPLE SEEK



Do you believe the sexes are completely equal? If you do, you're in the minority. Only around a third of men and a quarter of women surveyed agreed with that statement. Why is that? Is it more a question of women vs. society or women vs. themselves? A quarter of the global sample believe it's the latter—that women haven't achieved equality because they don't really want it.

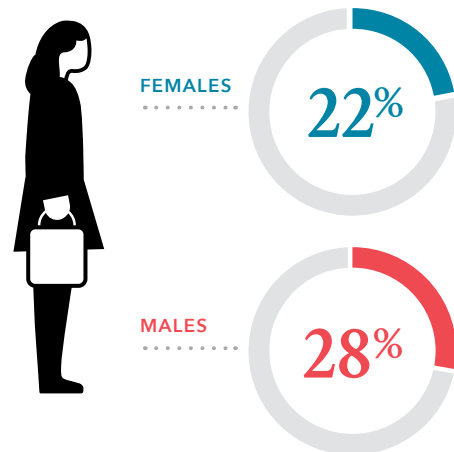
There is no more gender inequality;  
we are all equal



% AGREEING STRONGLY/SOMEWHAT

As would be expected, culture comes into play on this question. Globally, only 28% of men and 22% of women believe gender inequality is a result of women not wishing to be treated as the equals of men. But when we look at individual countries, we see a world divided between those who believe society is keeping women

Gender inequality isn't the fault  
of **men**; it's the fault of **women**  
who don't really want it



down and those who believe women are making the choice to retain secondary status. In three countries (India, Saudi Arabia, and South Africa), women were actually more likely than men to blame their own sex for continued gender inequality.

# Gender inequality isn't the fault of **men**; it's the fault of **women** who don't really want full equality

## Society's fault (< 30% of **women** agree)



SOUTH AFRICA	29%   20%	SINGAPORE	18%   23%
JAPAN	24%   28%	SPAIN	18%   20%
ARGENTINA	24%   26%	MALAYSIA	18%   20%
CZECH REPUBLIC	23%   27%	DENMARK	17%   33%
PHILIPPINES	22%   29%	UK	17%   30%
PORTUGAL	22%   25%	INDONESIA	17%   27%
US	20%   33%	AUSTRALIA	15%   22%
POLAND	20%   29%	CANADA	13%   18%
MYANMAR	19%   21%	IRELAND	12%   27%
GERMANY	19%   16%	BELGIUM	9%   16%
ITALY	18%   26%	NETHERLANDS	8%   17%
BRAZIL	18%   25%		

## Women's fault (> 30% of **women** agree)



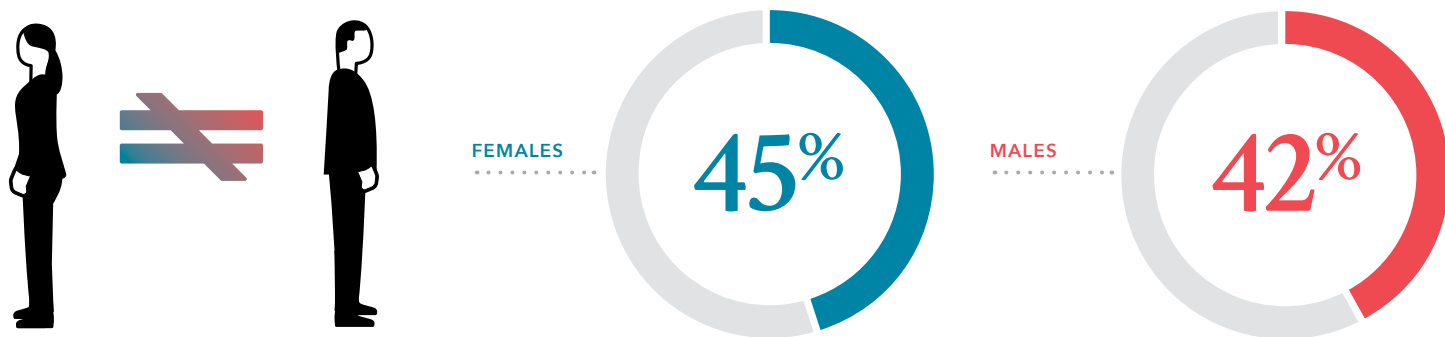
SAUDI ARABIA	45%   37%
INDIA	45%   32%
ECUADOR	36%   43%
CHINA	35%   35%
MEXICO	34%   32%
RUSSIA	33%   49%
CAMBODIA	33%   45%
UAE	33%   39%

FEMALES MALES

A more popular theory as to why women haven't achieved true equality is that the genders simply are not equal. More than 4 in 10 respondents (45% of women and 42% of men) believe this to be the case.

% AGREEING STRONGLY/SOMEWHAT

## True gender equality will never exist because the genders are not equal

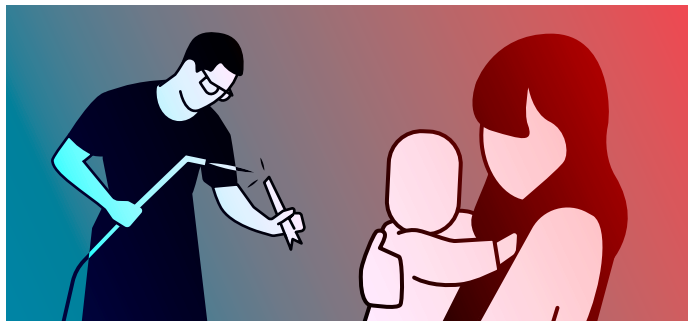


This raises the notion of what “equality” actually means. Is it purely about rights? About access to material success and political power? There is a strong argument to be made that true equality will be achieved only when males are no longer considered the “default” sex, when differences in females—a different response to a drug treatment, a behavioral distinction—are no longer seen as “deviating from the norm.” Even in 2017, women’s unique biological functions are seen as somehow shameful. When Chinese swimmer **Fu Yuanhui** attributed a poor performance to the fact

that she was menstruating, many people were shocked, while others praised her for breaking an outdated taboo. Studies have shown that menstruation can have a negative effect on academic performance, including test scores, and yet there don’t appear to be any accommodations made to offset that disadvantage for females. One can’t help but wonder whether the situation would be different if males were the ones affected. Would standardized testing be offered in consecutive weeks so boys could choose the date that would allow them to avoid their periods? It certainly seems plausible.

## INSIGHT #4:

# MEN ARE MECHANICAL, WOMEN ARE NURTURING



When we look beyond strictly physical distinctions, the question often arises as to whether differences between men and women are based more on “nature” or “nurture.” Are men naturally more confident and women more empathetic, or has society trained them to be so? (After watching the new movie *Wonder Woman*, one female tweeted: “No wonder white men are so obscenely confident all the time. I saw one woman hero movie and I’m ready to fight a thousand dudes barehanded.”)

We presented our respondents with a set of 25 characteristics and asked whether men or women tend to be stronger in each area. For 13 of those traits, a majority indicated there is no difference between the sexes. Most respondents believe that men and women are equally likely to be smart, hardworking, responsible, funny, intellectual, creative/innovative, valuable to society, honest, trustworthy, and confident. Most also believe that members of both genders are equally likely to be good leaders, good bosses, and good negotiators.

There were some distinctions, though, with a majority of both sexes considering men more mechanical and women more nurturing and sensitive. Men also credit their sex for being more adventurous and tech savvy, while women claim to be better bargain hunters.



A majority of **MEN**  
think **MEN** are...



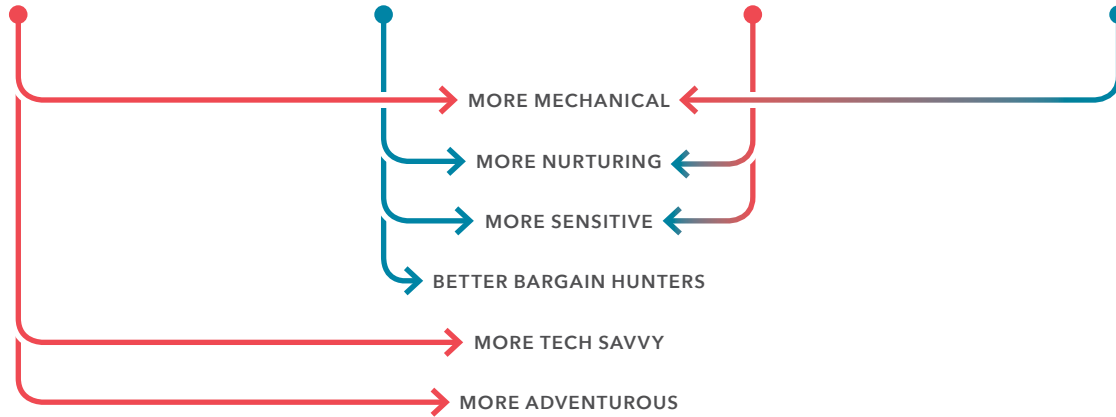
A majority of **WOMEN**  
think **WOMEN** are...



A majority of **MEN**  
think **WOMEN** are...



A majority of **WOMEN**  
think **MEN** are...



Looking at the minority of respondents who do not believe the genders are equal in these 25 areas, we found interesting distinctions in how men and women rate their own and the opposite sex.

In general, men tend to ascribe to women characteristics aligned with maternity and household management, while women ascribe to males characteristics deemed helpful in the workplace.



## MEN are more apt to think MEN are...

Smarter  
Harder working  
More responsible  
Funnier  
Better leaders

More intellectual  
Braver  
More creative/  
innovative  
Better bosses

Better negotiators  
More independent  
More confident



## MEN are more apt to think WOMEN are...

Kinder  
Emotionally stronger  
Better money managers  
More sensible

More honest  
More trustworthy  
Better bargain hunters



## WOMEN are more apt to think WOMEN are...

Smarter  
Harder working  
More responsible  
Kinder  
More intellectual  
Emotionally stronger

More creative/  
innovative  
Better money  
managers  
More valuable  
to society  
More sensible

More honest  
More trustworthy  
Better negotiators  
Better bargain  
hunters  
More independent



## WOMEN are more apt to think MEN are...

Funnier  
Better leaders  
Braver

Better bosses  
More confident



## INSIGHT #5:

# WOMEN HAVE RIGHTS, BUT NO REAL POWER

For all the progress made in recent decades, most women and around 4 in 10 men believe that modern-day women have rights but no real power. It's one thing to be able to vote in an election and quite another to be able to steer the political agenda.

Today, women have rights  
but no real power

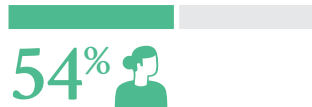
FEMALES



MALES



PROSUMERS



MAINSTREAM



% AGREEING STRONGLY/SOMEWHAT

## The world would be a better place if more **women** were in positions of power

### FEMALES



### MALES



### PROSUMERS



### MAINSTREAM



% AGREEING STRONGLY/SOMEWHAT

With less than a quarter of respondents claiming to be feminists, is women's lack of power really regarded as problematic? Perhaps surprisingly, a good portion of those who do not consider themselves feminists still believe the world would benefit from having more women in positions of power. We saw agreement on that statement from 4 in 10 respondents overall, including 45% of Prosumers and 39% of mainstream consumers. There is a growing consensus that when women are held back, countries and companies are held back as well. A 2015 McKinsey Global Institute **report** stated that advancing women's equality around the globe could add \$12 trillion to global GDP by 2025. And if women were allowed to advance to their "full potential"—defined as playing an identical role to men in labor

markets—that figure would more than double, reaching \$28 trillion. That's more than a quarter of the current GDP. Other studies have shown that hiring and promoting more women can have a marked effect on a company's bottom line. For instance, a **2016 study** by the Peterson Institute for International Economics and EY found that companies with at least 30% female leaders had net profits as much as 6% higher than companies with no women in leadership positions.

Men's continued political dominance is an issue as well. Earlier this year, the Pew Research Center **reported** that only 38% of 146 nations studied by the World Economic Forum have had a female head of state for at least a year in the past half century. Globally, women represented just under 23% of national parliamentarians as of **June 2016**—a discouraging number, perhaps, but twice the percentage of women who held such seats in 1995. Some countries, including Rwanda, Germany, and Argentina, have instituted quotas or reserved seats to address the gender imbalance in political office, while others are seeing an increase in organizations aiming to encourage and empower more women to run for office, such as **She Should Run** in the US, the **European Women's Lobby**, and **SWARGA** in Indonesia. Heads of state also can play a role in giving their fellow countrywomen a louder voice in politics, as Canada's Justin Trudeau and France's Emmanuel Macron did when announcing gender-balanced cabinets. For now, though, the world's governments are primarily the province of men.

## INSIGHT #6:

# SINGLE WORKPLACE, DOUBLE STANDARD

Gaining access to paid employment was a primary focus of the last century's women's movement, and, on the surface, that goal has been achieved. Women now account for nearly **40%** of the global workforce. That said, the farther up the corporate ladder one looks, the fewer women one sees. Globally, only **24%** of senior management positions are held by women, and, as of 2016, only **4.2%** of the top 500 US companies were run by women—this despite the fact that US women are now more likely than men to earn college degrees.

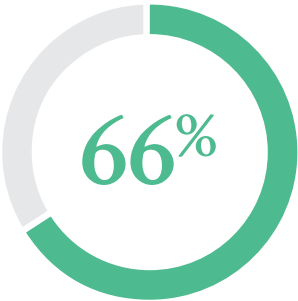
The gender imbalance within the top ranks of the corporate world isn't just an issue for women. A majority of the men we surveyed (52%) agree there are not enough women in executive positions today. Two-thirds of Prosumers and 64% of women feel the same. The imbalance is considered sufficiently problematic that more than a dozen nations have established quotas for women on corporate boards and in executive positions. Iceland has gone a step further by **requiring companies** to prove their pay is equitable to men and women or face fines. How successful such efforts will be remains to be seen, but our study provides one hopeful sign: Two-thirds of men (and women) don't have a preference when it comes to the gender of their bosses, which indicates that most men have come to terms with women in positions of authority—at least on a hypothetical basis.

There are not enough **women** in executive positions today

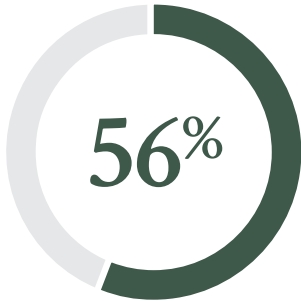
% AGREEING STRONGLY/SOMEWHAT



PROSUMERS

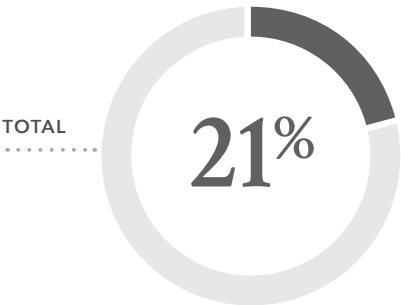


MAINSTREAM

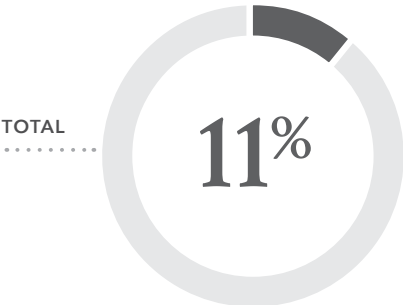


Which would you prefer? (choose one)

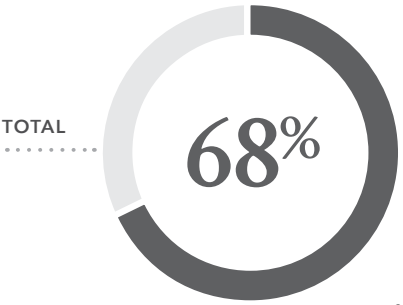
A **male** boss



A **female** boss



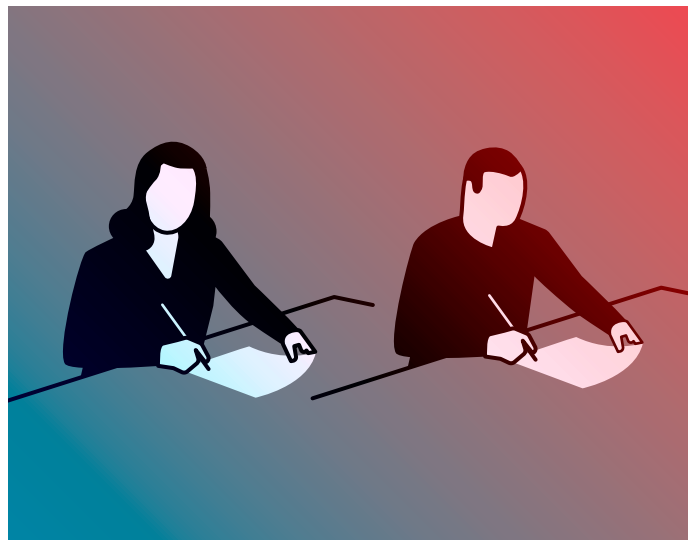
Makes no difference



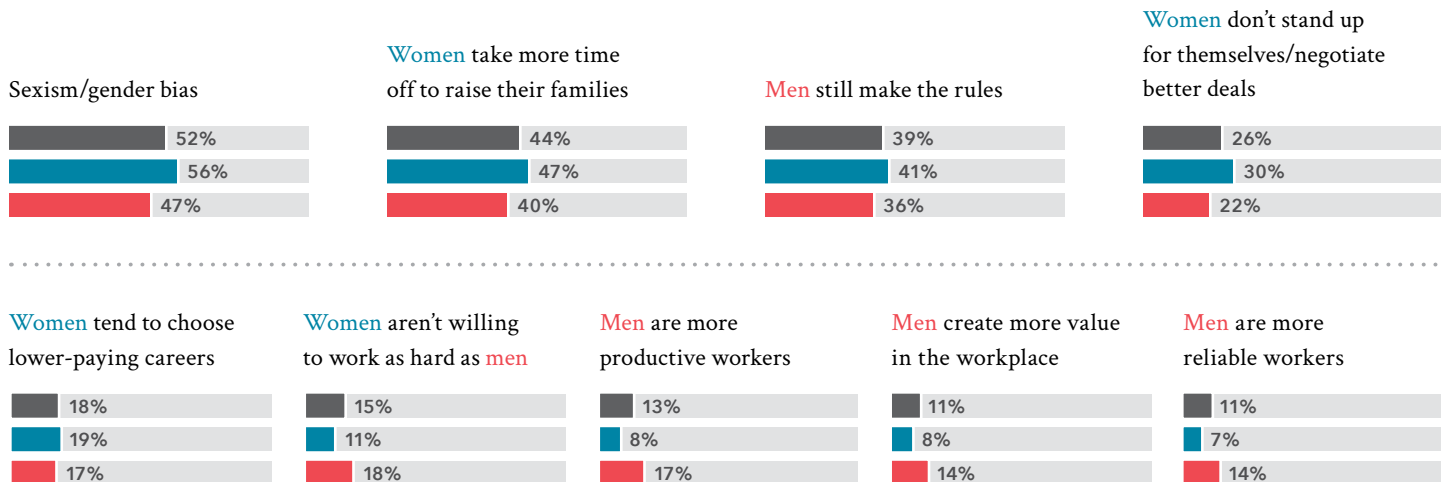
So what is holding women back in the workplace? We have seen a lot of articles recently about the so-called “**imposter syndrome**,” in which high-achieving women feel like frauds at work and are fearful of being exposed. Other commentators—Sheryl Sandberg, most famously—chide women for failing to aggressively pursue higher pay and promotions. A *Harvard Business Review* (HBR) **study** found that women are one and a half times less likely than men to apply for a position after having been rejected for a similar job.

While women may be to blame for not fighting harder for those C-suite positions, there is also the very real issue of institutionalized sexism. Stanford and the University of Chicago recently published a **study** showing that while women in finance work as hard as men, they are more likely to be penalized for their mistakes—despite being only a third as likely as men to make any. Another study by *HBR* revealed stark differences in how young male and female entrepreneurs are perceived. While the males seeking funding were described by venture capitalists with terms such as “young and promising” and “cautious, sensible, and level-headed,” the females were more likely to be deemed “young, but inexperienced” and “too cautious” or “worried.” What makes these findings even more telling is that the study was conducted in Sweden, which has been **ranked** as the fourth most gender-equal country in the world.

When we asked our respondents what prevents women from earning as much as men, the number one response was “sexism/gender bias,” while “men still make the rules” came in at number three. Sizable minorities believe earning disparities can be attributed to women taking time off to raise their families or females’ tendency not to stand up for themselves. Few respondents believe that men deserve to be paid more, whether because they work harder, are more productive and/or reliable, or add more value to the workplace.



## Which of these things prevent **women** from earning as much as **men**? (Choose all that apply.)



TOTAL **FEMALES** **MALES**

For now, women lag in the workplace, but that seems likely to change. We are seeing a strong trend toward what many describe as a more female style of leadership. Whereas aggressiveness and ambition were once thought to be key qualities of great executives, businesses now are **looking for leaders** who are honest, transparent, patient,

generous, creative, and empathetic—most of which have traditionally been seen as feminine qualities. So it may well be that the workplace is evolving into an environment in which women are more likely to succeed—and in which men will have to behave more like women to get ahead.

## INSIGHT #7:

# BABIES OVER BOARDROOMS



Earlier, we saw that nearly half of women and 4 in 10 men believe one reason women earn less than men is that they take more time off to raise their families. It's a tradeoff many parents appear willing to make. Our study found that nearly 3 in 4 women and men consider successful parenting more important than having a successful career. For now, the onus for that falls more heavily on women than men. Of the parents surveyed, 35% of fathers said they leave most of their children's care to their wives/female partners, compared with just 13% of mothers who said the childcare burden falls disproportionately on their husbands/male partners.



Being a successful parent is  
more important than having  
a successful career

FEMALES

72%

MALES

73%



Parents only:

I leave most of the childcare  
to my spouse/partner

TOTAL  
24%

FEMALES

13%

MALES

35%

Parents only:  
I sometimes use work as an excuse to  
not spend time with my child(ren)

TOTAL  
19%

FEMALES

15%

MALES

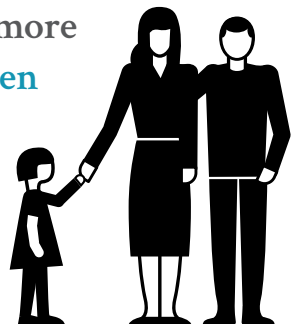
23%



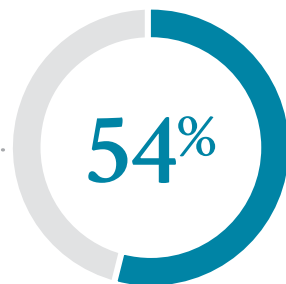
Much has changed in parenting over the past half century—in both attitudes and behaviors. In many parts of the world, men are now more hands-on as fathers. A 2014 [study](#), for instance, found that working fathers in the UK now spend an average of 35 minutes a day with their offspring, compared with just five minutes in 1974.

to their childrearing. Only one response received near-majority agreement: Just over half of fathers (51%) and 42% of mothers admitted feeling guilty that they don't have enough time to play with their children. More than 4 in 10 dads and just less than 3 in 10 moms feel guilty that they miss a lot of their children's life events.

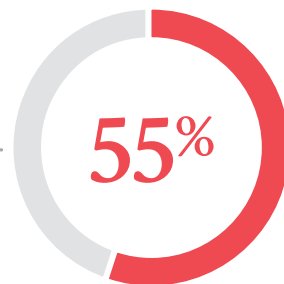
Parenting comes more naturally to **women** than **men**



FEMALES



MALES



% AGREEING STRONGLY/SOMEWHAT

There also appears to be more of a sense that men are fully capable of handling parenting duties. Only just more than half our global sample believe parenting comes more naturally to women than men. That's pretty astonishing given the historic division of labor.

Given the tendency of working mothers to express a sense of guilt over time spent away from their children, we also asked the parents in our sample which of five things cause them to feel guilty in regard

Interestingly, women were only slightly more apt than men (29% vs. 27%, respectively) to say they feel guilty when they leave their children in order to go to work; it should be noted, however, that we did not exclude stay-at-home parents from that set of questions, which may have skewed the results.

Parents only:

## I feel guilty that...

I leave my kids  
to go to work

29%

27%



I do not have enough  
time to play with  
my kids

42%

51%



I miss a lot of my  
child(ren)'s life events

29%

44%



I do not have time to  
help my kids with  
their homework

23%

32%



I feed my kids  
processed foods

27%

21%



Modern approaches to both work and parenting tend to be all consuming. At the same time that digitalization has made it possible—and often imperative—to stay connected to one's job outside of work hours, new pressures are being placed on parents to do an ever-better job of raising their kids to succeed in our increasingly competitive world. Something has to give, and often that “something” ends up being the female parent's career. If companies and governments truly believe that greater participation by women will lead to better outcomes for all, then more must be done to ensure that family and career are a both/and proposition rather than an either/or.

FEMALES MALES

% AGREEING STRONGLY/SOMEWHAT

## INSIGHT #8:

# RELATIONSHIP STATUS: FLEXIBLE

Men are still outearning women in the workplace, but how do things look on the personal front? The evidence suggests a decidedly more egalitarian bent in male-female relationships these days. Only 28% of our global sample say that relationships work better when the man earns more than his female partner. Again, there's a cultural slant: We found majority agreement on this statement in five markets: Cambodia, China, India, Indonesia, and Russia. This was countered by agreement levels of less than 15% in Argentina, Australia, Belgium, Canada, Denmark, France, Mexico, the Netherlands, Portugal, and Spain.

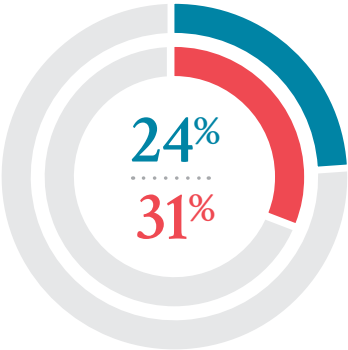
We saw similar responses on the question of whether male-female relationships work better when the man is the dominant partner. Nearly a third of men and just under a quarter of women agreed. Interestingly, millennial respondents were substantially *more likely* than baby boomers to agree that things work best when the man is in charge and that relationships work better when the male partner earns more. Prosumers also were slightly more likely than mainstream consumers to agree with these statements, suggesting the possibility of the pendulum creeping back toward male authority or perhaps simply toward traditional gender roles.

We saw higher levels of agreement on the question of whether relationships work better when chores are divided according to traditional gender roles, although men were substantially more likely than women to agree. Nearly half of women surveyed (46%) *disagreed* with the notion that chores should be divided according to traditional gender roles, compared with just 31% of men who said the same.

As would be expected, there were stark cultural distinctions on the question of whether the male should be the dominant partner in a relationship. Two countries (Belgium and the Netherlands) returned agreement rates of less than 10% on that statement, while four (Cambodia, Indonesia, Russia, and Saudi Arabia) showed majority

agreement. The extent to which attitudes toward women's role has evolved can be seen in the fact that even in such traditional cultures as India and China, only around half of men agreed that males should dominate.

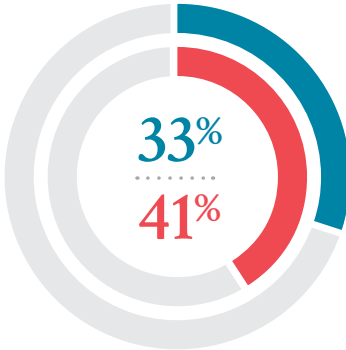
Male-female relationships work better when the **man** is the dominant partner



Relationships work better when the **man** earns more than his **female** partner



Relationships work better when chores are divided according to traditional gender roles\*

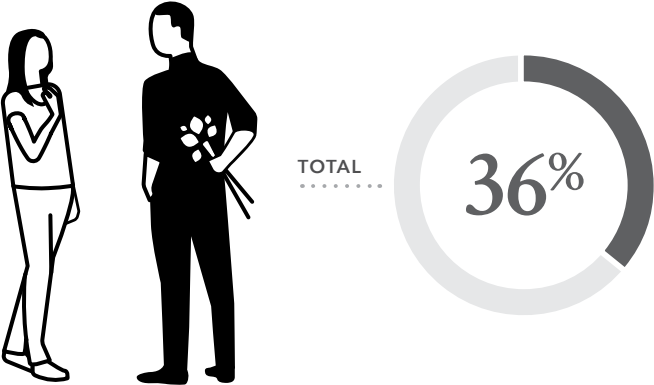


**FEMALES** **MALES**  
% AGREEING STRONGLY/SOMEWHAT

\*e.g., the woman is primarily responsible for cleaning, cooking, and childcare, while the man is primarily responsible for home repairs, car maintenance, lawn care, etc.

Society's more egalitarian attitudes can also be seen in responses related to romance. Only around a third of respondents believe it should be up to the man to initiate romantic relationships, and the global sample was fairly equally divided among those who think that men should pay for all or most dating expenses, that the couple should split the expenses equally, or that the costs should be divided based on how much each partner earns. On these statements, women were less likely to believe the man should be responsible for shouldering the financial burden on dates. Looking at the individual markets, Indonesians were most apt to cling to the tradition of men footing all or most of the dating bills (87% agreement). Least likely to agree: Portuguese (5%) and Spaniards (6%).

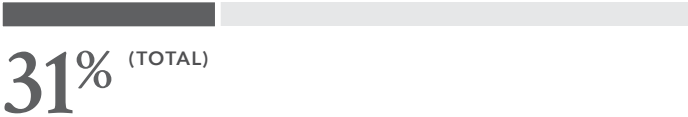
**Men** should initiate romantic relationships



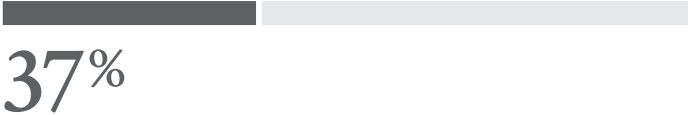
Which comes closer to your point of view?

(Choose one.)

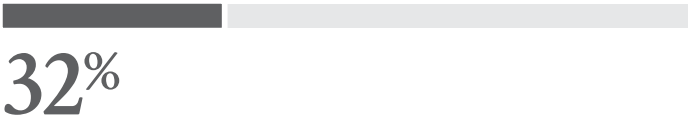
When a man and a woman are dating, the man should pay for all or most of the expenses



When a man and a woman are dating, they should split the expenses equally



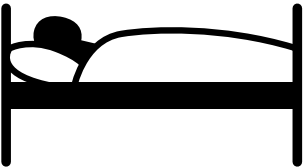
When a man and a woman are dating, the expenses should be divided according to how much each person earns / can afford



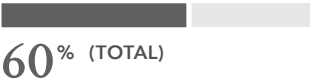
We also came at the question of whether men still need to be financially dominant from another angle: Is the fact that a woman outearns her husband likely to lead to divorce? Far from it. Out of seven scenarios we provided, asking which three would be most likely to lead to divorce, the man earning less than the woman came in dead last, seen by only 12% of the global sample as likely grounds for marital dissolution. The most likely cause of divorce (we didn't ask about infidelity): an unsatisfying sex life. This was followed

by conflicts centered around money and parenting. Interestingly, at a time when so much of the world seems to be grappling with polarizing politics, less than 1 in 7 respondents believe conflicting political values and beliefs are likely to end a marriage. Even in the wake of highly contentious presidential elections, only 13% of those in France and 16% in the US said conflicting politics would be likely to lead to divorce court.

Of the following, which do you think would be most likely to cause a married couple to get a divorce? (Please choose the three most likely causes.)



Unsatisfying sexual life



Conflicting approaches to spending/saving/money management



Lack of money



Conflicting parenting approaches



Different religious beliefs



Conflicting political values and beliefs



The woman earning more money than the man



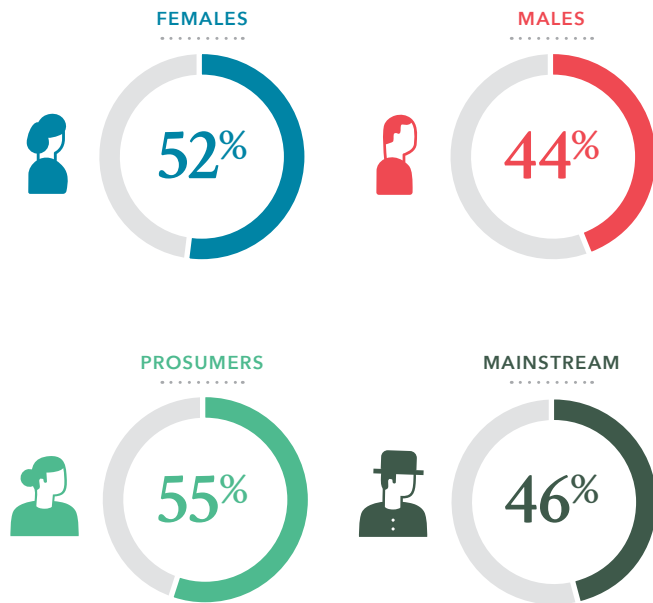
## INSIGHT #9:

# A NEW VIEW OF GENDER

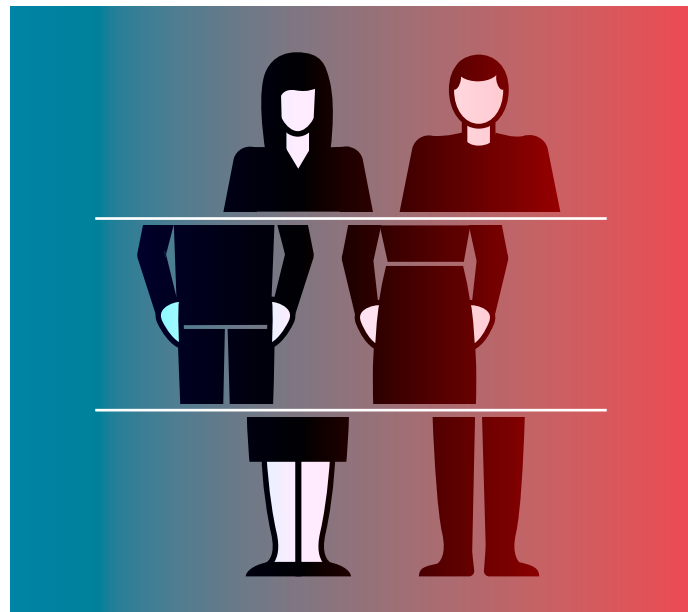
The notion that there are more than two genders goes back at least as far as the 4th century BC, when Plato wrote about the three “original” sexes: female, male, and androgynous. Multiple cultures have embraced alternatives to males and females since then, including the *hijras* in South Asia and the *muxes* in Mexico—in both cases referring to people who are born male or intersex and present as female or who don’t consider themselves entirely of one sex or the other. In recent years, the notion of additional genders has become less about cultural customs and more about politics and equality. In 2014, India’s Supreme Court recognized transgender as a third gender under that country’s law. That same year, Facebook expanded gender settings on user profiles to encompass some 50 options (since expanded to 71), ranging from asexual and transsexual to polygender and “two-spirit person.” And in 2017, Oregon became the first US state to **permit** residents to put an “X” on state IDs and driver’s licenses, rather than conform to the traditional “M” (male) or “F” (female).

Given the relative newness of the concept, it is somewhat surprising that nearly half our global sample—44% of men and 52% of women—agreed strongly or somewhat that they don’t believe in set genders, that gender is fluid and everyone can be what they feel they are. A majority of Prosumers agreed with the statement, indicating that acceptance of gender fluidity is likely to grow.

I do not believe in set genders;  
gender is fluid, and everyone  
can be what they feel like



% AGREEING STRONGLY/SOMEWHAT

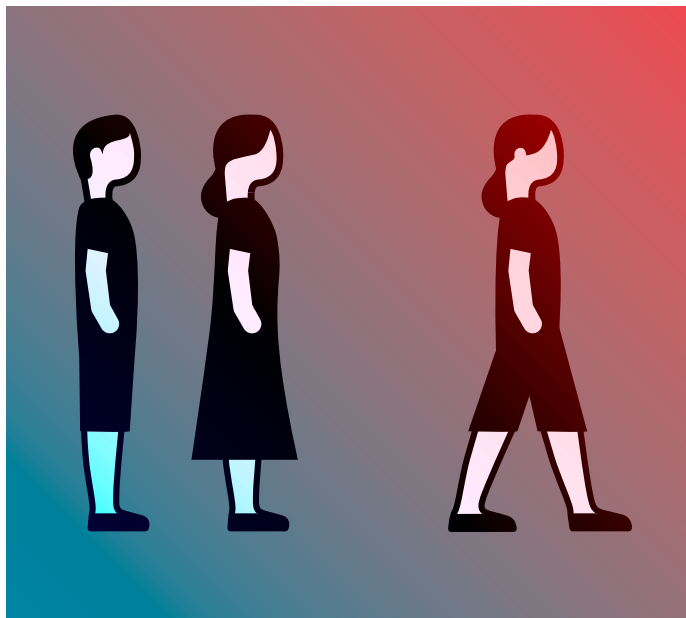


Already, we are seeing a rise of gender fluidity in fashion in the West, with a number of high-profile brands tapping into the trend. **H&M** launched a genderless line, while **Cover Girl** has hired its first male model. In the luxury category, **Louis Vuitton** chose celebrity teen Jaden Smith as the new face of its 2016 *womenswear* campaign, and **Chanel** draped Pharrell Williams in pearls for the launch of the Gabrielle bag. There is also a growing push toward gender neutrality in children's **clothing** and **toys**.



## INSIGHT #10:

# A BATTLE OVER NURSERY NEUTRALITY



As societies grapple with the notion of nonbinary genders, will parents be any less likely to rear their children according to traditional gender dictates? Our sample was very much divided on this issue, with 47% saying that boys should be raised as boys and girls should be raised as girls, and 53% saying it's best to raise children in a gender-neutral way. Females were particularly enthusiastic about the gender-neutral approach, with 61% advocating for it compared with just 46% of males.

## Which comes closer to your point of view?



FEMALES



As much as possible, parents should raise their children in a gender-neutral way so as not to impose rigid gender restrictions



MALES



Girls should be raised as girls and boys should be raised as boys (different activities, playthings, clothing, etc.)

### MILLENNIALS



### GEN XERS



### BOOMERS



### MILLENNIALS



### GEN XERS



### BOOMERS



There was a wide divergence in how the various countries view this issue. Three-quarters of respondents in China and a whopping 91% in Russia and 100% in Indonesia assert that boys and girls should be raised according to traditional gender norms. They face off against respondents in Canada, the Netherlands, Portugal, and Mexico, around two-thirds of whom advocate a gender-neutral approach to childrearing. The samples in two European countries were even more likely to advocate gender neutrality, with Spain returning an agreement level of 88% and Belgium coming in at 73%. In some markets, younger respondents are leaning more toward the gender-neutral side on this issue, suggesting that gender restrictions are likely to wane in coming years. In China, for instance, only 16% of those aged 55+ advocate gender neutrality in childrearing, compared with 32% of millennials.

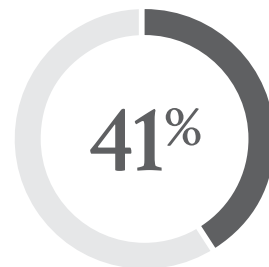
To a large extent, a country's childrearing preferences reflect that society's level of concern over boys and girls straying from traditional gender norms. In Indonesia, 97% of respondents worry that boys are becoming less masculine, while 95% worry that girls are becoming less feminine. In Russia, those figures are 78% and 67%, respectively, while in China they're 64% and 38%. This contrasts sharply with Spain, where only 19% worry about boys becoming less masculine and 20% worry about girls becoming less feminine. The figures are only slightly higher in Belgium—at 23% and 22%, respectively.

% AGREEING STRONGLY/SOMEWHAT

## I worry that **boys** are becoming less masculine



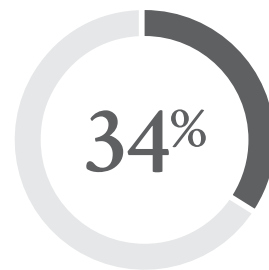
TOTAL  
.....



## I worry that **girls** are becoming less feminine



TOTAL  
.....



## INSIGHT #11:

# BOYS DON'T CRY, BUT GIRLS CAN BE ALPHA MALES

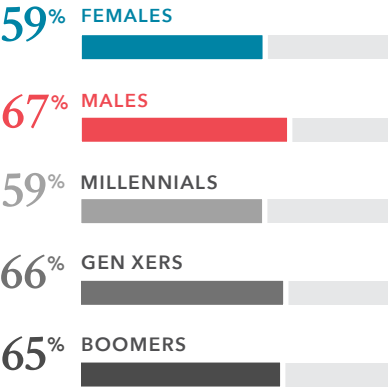
Respondents' tendency to worry more about boys becoming less masculine than about girls becoming less feminine is in keeping with the greater leeway girls historically have been given to adopt nontraditional gender behaviors. It has long been more socially acceptable for little girls to play with trucks than for little boys to play with dolls. Parents are free to adopt traditional boys' names for their baby girls—from Allison and Ashley to Sydney and Whitney—but once a name transitions to female, it's essentially verboten to boys. We see a similar phenomenon in adulthood: Women are told to aim for the boardroom, but men are derided for being stay-at-home dads. Women are free to wear jeans and sneakers, but woe to the man who leaves his house in a skirt and heels. What's good for the goose is typically not good for the gander. In this respect, women are actually more liberated than men.

We tested this theory with a number of questions related to masculinity and femininity. And, sure enough, the expectations were more rigid with regard to males. More than two-thirds of men believe "a man should be masculine," while only 52% of women believe "a woman should be feminine." Nearly half the sample said a man who wears makeup is "not masculine enough," and nearly a third said the same of a man who devotes a lot of time to personal grooming. In contrast, only 1 in 10 respondents believe that a woman who does not wear high heels is "not feminine enough," and only 14% said the same of a woman who does not wear makeup. It's worth noting that in every single case, men were more apt than women to

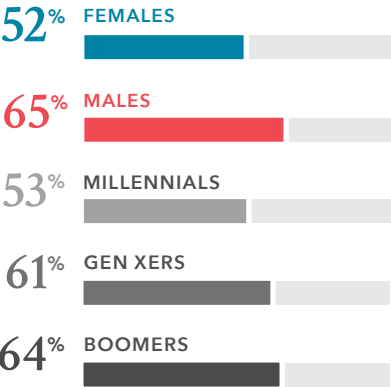
champion traditional gender roles. We also saw huge distinctions between countries. In Russia and Indonesia, for example, more than 9 in 10 respondents believe men should be masculine and women

should be feminine. This is more than twice the percentages of agreement we found in Ireland, Myanmar, and the Netherlands.

A **man** should be masculine



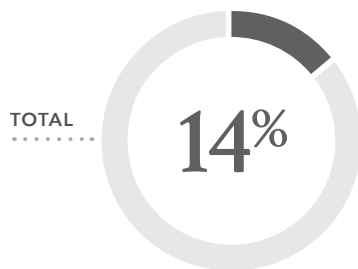
A **woman** should be feminine



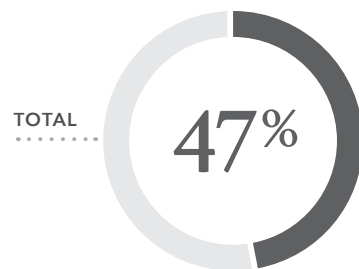
A **woman** who does not wear high heels is not feminine enough



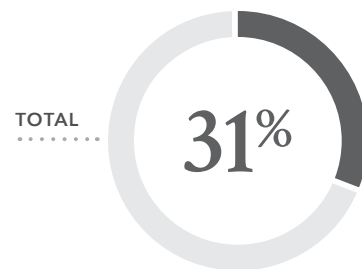
A **woman** who does not wear makeup is not feminine enough



A **man** who wears makeup is not masculine enough



A **man** who devotes a lot of care to personal grooming is not masculine enough



% AGREEING STRONGLY/SOMEWHAT

The high levels of acceptance of women not wearing high heels or makeup is in keeping with a broader push these days to free women from stringent ideals of what it means to be feminine. Young artist Amalia Ulman became an internet sensation with her **"Excellences & Perfections"** project, aimed to show that femininity is a carefully crafted construct, not something innate in those lacking a Y chromosome. H&M sought to expand the definition of "ladylike"

with its **"She's a Lady"** campaign. And Dove launched **"My Beauty My Say"** to both celebrate women's self-empowerment and change the media conversation about what it means to be feminine. We don't see a similar push to free adult men from the constraints of masculinity, although there is a **movement afoot** to support boys who wish to adopt traditionally female dress and pastimes.

## INSIGHT #12:

# ADVERTISING IS OUTDATED

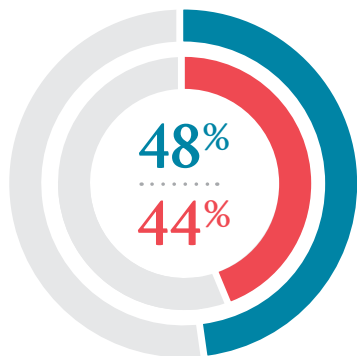


Attitudes toward gender may be changing, but brand communications are lagging behind. More than half of Prosumers and 44% of the mainstream complain that TV commercials show too many outdated gender stereotypes. Nearly half of women resent the way their gender is depicted in a lot of advertising, and nearly a third of men are unhappy with how males are presented.

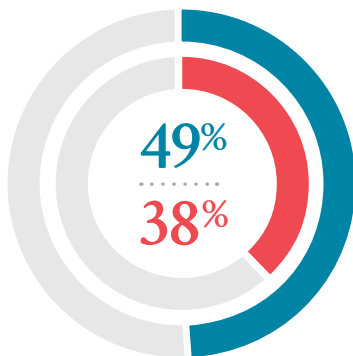
In some markets, these figures run markedly higher. In Ecuador, France, and Spain, for instance, around two-thirds of the total samples—and nearly three-quarters of women—believe TV ads rely too heavily on outdated gender stereotypes. Saudi Arabia and Spain were the countries most apt to resent the depiction of both women and men in advertising. Brazil also scored high in its resentment of how females are depicted. China stood out as the only market in which respondents were more likely to resent depictions of men (22% agreed) rather than depictions of women (19%) in advertising. One of the hottest new “**boy bands**” in China is actually made up of five androgynous girls—a development that may help explain Chinese respondents’ concerns over waning gender distinctions.



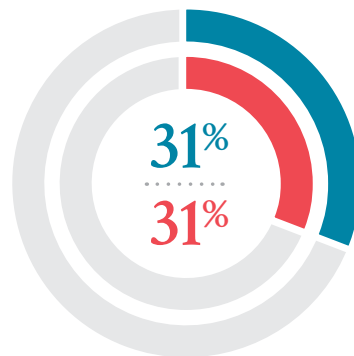
TV commercials show  
too many outdated  
gender stereotypes



I resent the way **women**  
are depicted in a lot  
of advertising



I resent the way **men**  
are depicted in a lot  
of advertising

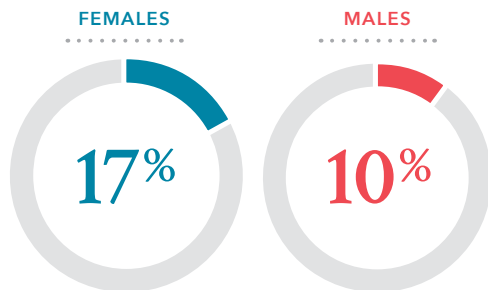
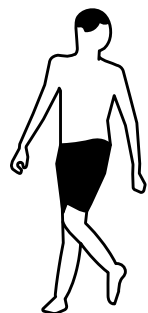




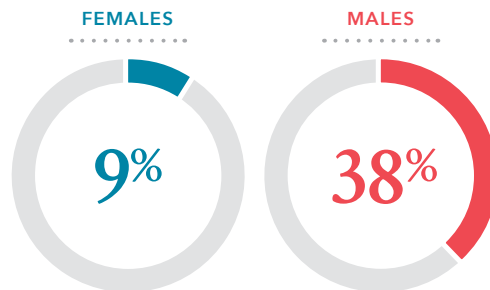
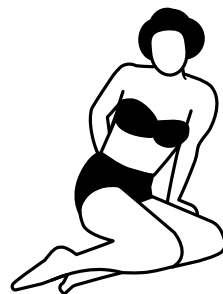
Changing consumer attitudes are having an impact on ad campaigns, as we have seen with the 180° turnaround fast-food chains **Carl's Jr. and Hardee's** have made away from ads centered on scantily clad girls to more mature messaging focused on the food they serve. Still, not everyone is ready to move away from sexualized advertising. Nearly 4 in 10 men in our survey said they enjoy

Advertising has the power to do much more than titillate, of course, and we are sure to see more campaigns focused less on curves than on social change. Audi received generally high marks for its **2017 Super Bowl ad** promoting gender pay equality, while Always' "**Like a Girl**" campaign has been applauded for breaking gender stereotypes and helping empower girls and young women. Similarly, Cheerios'

I enjoy watching advertising that shows semi-naked **men**



I enjoy watching advertising that shows semi-naked **women**



% AGREEING STRONGLY/SOMEWHAT

watching advertising featuring semi-naked women, while 17% of women say they like watching advertising that depicts semi-naked men. Russia was the country most unabashedly enthusiastic about voyeuristic ads, with 34% of women saying they like seeing semi-naked men in ads and 65% of men saying they like watching ads that show semi-naked women.

**#HowToDad** campaign depicted fathers as hands-on, empathetic caregivers—a break from the rarely seen authority figures of the past.

CONCLUSION:

FROM WOMEN'S  
MOVEMENT TO PEOPLE  
EMPOWERMENT

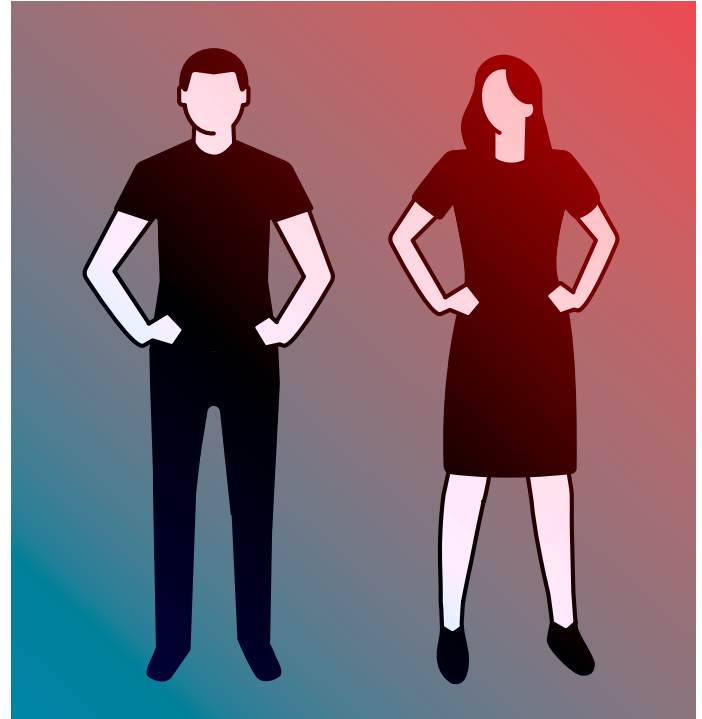
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Anyone who spends a lot of time on social media cannot help but be aware of the current backlash against women and what so many see as a “feminist” agenda to subjugate men. The findings of this global study paint a very different picture. For the most part, we see that men and women are both supportive of women’s advances and cognizant of the added value women could bring to business and government alike if permitted to play a role equal to men’s. While deep inequities are more apparent in some parts of the world than others, in every society women are still expected to play according to rules they historically had no say in creating. We have seen, too, that when women adopt the attributes of men to play by these rules, they often run into a different set of standards and are penalized for acting in a way that is considered unfeminine. Men, too, are hampered by outdated restrictions on what is considered suitable for the male of the species.

As we saw above, brand communications have a role to play in ensuring that women and men aren’t held back by outdated assumptions and counterproductive barriers. BETC São Paulo worked with the organization **Woman Interrupted** on a campaign to raise awareness of the fact that women are significantly more likely to be interrupted by men in meeting rooms, classrooms, and elsewhere. We are certain to see more such efforts in coming years.

The future may not be female, but it will surely be shaped more by women than history has been to this point. Brands can help pave

the way to a more equitable future by shining a light on those areas most in need of change and by modeling within their own businesses and supply chains how best to empower and support people, regardless of gender.



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