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TODAY'S WOMEN: NEWFOUND POWER, PERSISTENT EXPECTATIONS

EXECUTIVE SUMMARY

Marketers will always focus on American women given their spending power, yet while women have evolved over the decades, marketers haven't evolved with them to the same degree. This paper looks at broad cultural and attitudinal trends across three generations of American women—Millennials, Generation X, and Baby Boomers—and finds that while women are seeking to embrace their newfound power, there are persistent expectations for women to do it all, look good, and be nice, regardless of their generation or their age. For marketers, this means there is an opportunity to forge a new relationship with women, one founded on empathic understanding instead of simply from an informed vantage point, one founded on women's internal motivations—not just the expectations they feel.



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Marketers should be thrilled that their muse—the American woman—is gaining even more influence. Women have always been marketers' leading consumer target, since they have historically driven 75% of household spending.¹ Now, more and more of that spending is coming from their own wallets. This shift is here to stay, especially when one considers these statistics:

- Women earn almost 60% of all college degrees. They make up 60% of master's degrees, about 50% of law and medical degrees, and 42% of M.B.A.'s. And men are now more likely than women to have only a high school diploma.²
- The job market doesn't look any better. It's been widely reported that men lost the most jobs in the last recession, losing three-quarters of those cut between late 2007 and 2009.³ And make note that mothers are already the primary breadwinner in four out of ten American households.⁴
- Women have the strongest presence in 13 of the top 15 job categories expected to grow the most in the next 10 years, and many economists believe that the average woman in the U.S. will earn more than her male counterpart in comparable roles by 2024.^{5,6}

With all this newfound power, one might expect women to feel added pressures—to feel as if they need to start doing more. But this doesn't appear to be the case in light of the research we conducted for this paper. Less than 30% of women today “feel added pressure to do more these days given all the news in the last two years about the rising power of women.”⁷ Perhaps this shouldn't be surprising—what we learned is that women across all age groups are already expected and motivated to do a lot. And for those women who do feel the added pressure, these expectations and motivations are magnified.⁸

The women's movement succeeded on many levels, and women now have advanced beyond struggling to secure rights. Women now appear more focused on their own empowerment, their own choices, their own motivations. In our survey, we found that 86% of female respondents think that women should both pursue their own personal motivations and be able to make their own choices and not be judged by them.⁹

And yet while this is true, we find that women continue to experience some persistent external pressures and expectations that don't always fully align with their own motivations. Women today still feel pressure to do it all, to

look good while doing it, and to have people like them. In this paper, we further explore these three pressures and how they are either in line or inconsistent with women's motivations.

We also considered three core generational targets of interest to today's marketer: Millennials who have grown up not knowing anything other than that juggling it all is a part of life; Generation X women who were the first to come of age at a time when women were not constrained to thinking they belonged at home; and Baby Boomers who fought the good fight and helped earn all this newfound freedom. While these women grew up with distinct childhoods and are now in distinct life stages, we find that those three external pressures are consistent and persistent.

What does this mean for marketers? First and foremost, consider that "business as usual" won't win in the marketplace; marketing to women should evolve as they themselves are evolving. Second, beyond demographic segments, understand that defining "women" as a target is not sufficient. This paper deals with the foundation of broad cultural and attitudinal trends that need to be considered, upon which category-specific granular insights should then be built. Finally, when it comes to brand positioning and brand communication, there exists an opportunity to address women's internal motivations distinctly from the external expectations. Speaking directly to their personal motivations, given their preference to follow them, could prove most powerful. Or marketers may find that the answer lies in choosing definitively to market to one side versus the other. At the end of the paper, we provide message directions that were found to be motivating to these women and that can provide marketers with a place to start exploring optimal positioning and communication.

The Three Expectations



DO IT ALL



LOOK GOOD



BE NICE

DO IT ALL

No matter how one looks at it, women today manage many facets of life. The majority of them manage working outside the home and family responsibilities, while also managing a household and dedicating time to finding a partner or building a relationship with a mate.

Women will have to accept that “doing it all” will likely be a perpetual state, because they won’t be leaving the workforce anytime soon. Looking at the statistics over the last three decades, there’s been an upward trend—one that finds women in the workforce in growing numbers. Of women with children in preschool, one-third worked outside the home in 1970. By 1976 that number was 43%, and it had jumped to 50% by the mid-1980s. Finally, by 1990, 60% of mothers with children under the age of five were working, a 30% swing compared to the two decades prior.¹⁰ Today, 70% of women hold a job outside the home.¹¹ There’s no doubt that women have been hard at work in force for quite some time.

Yet, if one listens to the stories in the media, it seems as if women are often struggling with the decision of whether or not to work or just stay home with their children. The reality is many women and families have to work to meet all their financial obligations.¹² And while there are stories in

Women with children in preschool working outside the home:

33%
in 1970

43%
in 1976

50%
in mid-1980s

60%
in 1990

the press about mothers apparently “opting out,” this has been found to be a myth. More often women weren’t leaving out of preference, but because the workplace couldn’t accommodate the lives they live today.¹³ In fact, sociologists Pamela Stone and Meg Lovejoy saw in their research that 86% of the professional women who left the workforce did so for “workplace factors such as inflexible jobs.”¹⁴

While there’s debate about whether women or men do more at home, the reality is that women are also juggling household duties in addition to being in the workforce. A recent study by Oxford University suggests that this is fairly embedded. Oxford studied women’s and men’s household roles across multiple countries, including the United States, finding that men are not projected to equally share household work until 2050, nearly 40 years from now. And the progression towards equality is slowing. The reasons for this poor forecast are the continued teaching of gender roles and social policies that support the idea that certain household jobs are meant for women and certain ones are meant for men.¹⁵

Despite women working more, it doesn’t mean that they don’t want to get married and have a family. While some women may be delaying marriage and not having kids in pursuit of a career, the majority of women are still getting married and raising families. Even though the percentage

of women between 30 and 44 years old who are married has gone down from 84% in 1970 to 60% now, the fact is, the majority of women are in a relationship and have a preference for such.¹⁶ In fact, over 60% of women ages 30 to 60 rated marriage/relationships and parenthood as “very important” at this stage in their lives.¹⁷

LOOK GOOD

For better or worse, the expectations put on women to look good have never gone out of style.

Simply considering the fact that women desire to be loved and that societal messages suggest that how you look is a key driver of winning a man, it’s not surprising to find that “looks” are a persistent expectation throughout life.¹⁸ In *Cinderella Ate My Daughter—Dispatches from the Frontlines of the New Girlie-Girl Culture*, Peggy Orenstein argues that our culture teaches girls from a very young age that looks are more important than who they are as individuals.¹⁹ So despite all the statistics that demonstrate the fact that women are getting more educated, capable, and accomplished, a woman’s physical appearance remains a priority in today’s culture.

When analyzing media storylines, research shows that they tend to focus more on how women look rather than on what they do and who they are.²⁰ TV shows follow suit. Even as

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The expectations of women to be pretty and always look good is pervasive and emphasized throughout society, regardless of a woman's age.

we write this, a new TV show came to the air on the heels of *Mad Men*; *The Playboy Club* on NBC celebrated the opening of the first Playboy Club in Chicago and showcased pretty women wearing the recognizable bunny outfit. ABC has its competing series in the same genre, *Pan Am*, featuring the dames of the sky who “do it all and . . . do it at 30,000 feet.” Given the rising role of women in the world, one wouldn’t expect this to be the portrayal of female empowerment today. Melissa Maerz in the *Los Angeles Times* suggests this point of view: “At a time when many men are anxious about job stability and women are getting higher college degrees, *Pan Am* and *The Playboy Club* recall a less threatening era, when an ambitious woman’s prime goal was to serve the guys who rule the boardroom.”²¹

Then take the controversy in the ad world over the airbrushing that is prevalent in print advertisements, raising unrealistic expectations of how women should look. The expectations of women to be pretty and always look good are pervasive and emphasized throughout society, regardless of a woman’s age.

BE NICE

For generations, women have been taught and socialized to be polite and nice, often being told not to rock the boat and instead being instructed to be a “good girl.” Rachel Simmons, in *The Curse of the Good Girl*, writes that this lesson is taught early through social cues, situations, and communication. Girls are taught to focus on others rather than themselves, to be modest, and to be demure and unassertive, often leaving them with the lack of confidence to take advantage of all the benefits feminists before them fought hard to win.²² Women’s biology also supports this behavior; it is not teaching alone that leads to women being nice. Research studies have shown that women are built to be caring and inclusive.²³

Regardless if it’s nature or nurture that leads women to be nice, from home life to social situations to roles at work, women are frowned upon if they are overly direct and aggressive—they always have to be careful to avoid being called the “b” word. In fact, in *Women Don’t Ask—Negotiation and the Gender Divide*, Linda Babcock and Sara Laschever report on a “Bully Broads” growth and leadership program that was started specifically to help executive women who were overly direct at work become “nicer.”²⁴

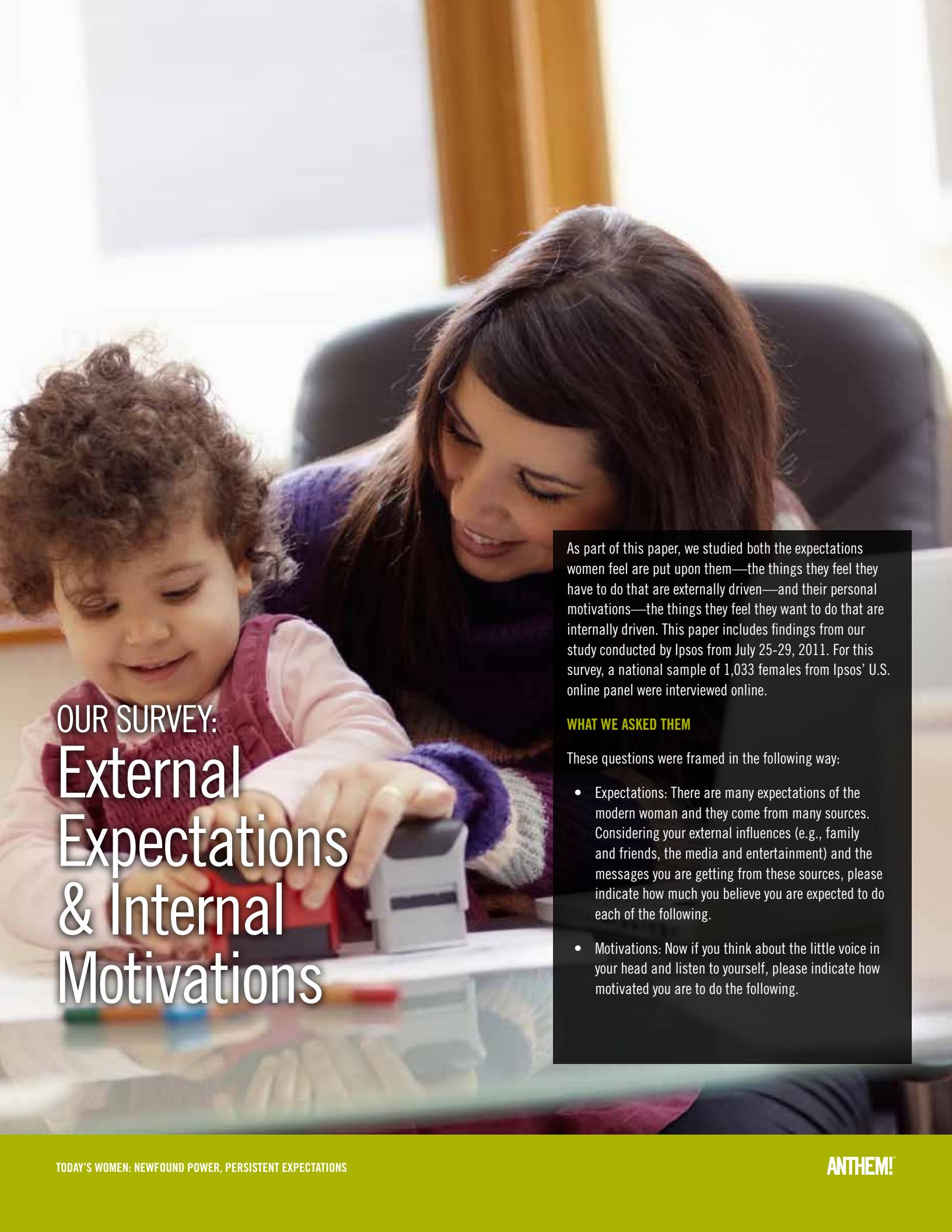
But being nice isn’t all it’s cracked up to be. It doesn’t always lead to the positive results women might expect. Hillary Clinton in her campaign for President knew this all too well. She herself would say to her advisors, “He wants to force me into a corner where I will say, Okay, fine, I give up, I’m the girl, I give up. I’m the *nice* person, I don’t want to have a fight. I’ll go home. Well, I’m not going to do it . . . I’m sick of being pushed around in this campaign. I’m not going to give up. I’m not going to tell my daughter—Oh, I quit, because I’m the girl and they’re all being mean to me. I’m not going to do it.”²⁵

Perhaps the title of this book by Lois Frankel says it all, as well—*Nice Girls Don’t Get the Corner Office*—and yet another book, *Top Tips for Girls—Real Advice from Real Women for Real Life*, by Kate Reardon, speaks to the fact that there’s a high cost to being too nice. Instead Reardon suggests focusing on building confidence, competence, conviction, and courage, characteristics that could serve women well in negotiations, where it appears being nice also doesn’t lead to positive results for women, as Babcock and Laschever write specifically.²⁶ Rana Foroohar also reported on this in *Time* magazine noting Mika Brzezinski, who wrote in *Knowing Your Value: Women, Money, and Getting What You’re Worth*, that women “expect, in a good-girl way, employers to be fair about pay; they worry that people won’t like them if they negotiate too hard.”²⁷

These are prime examples that believing you need to “be nice” can have negative implications for women, and yet we learned in our survey that being nice is an expectation that is deeply engrained in women of all ages.

CONCLUSIONS

Beyond our research for this paper, there is sufficient evidence that these three expectations are persistent for women today—they still feel pressure to do it all, to look good while doing it, and to have people like them. The question is whether or not these cultural expectations that persist from generation to generation are aligned to women’s true motivations. Could there be a better approach to connecting with women that is driven from a different part of themselves? In the next section of the paper, we share findings from our survey, further building the foundation of what might provide new angles to market to women.



OUR SURVEY:

External Expectations & Internal Motivations

As part of this paper, we studied both the expectations women feel are put upon them—the things they feel they have to do that are externally driven—and their personal motivations—the things they feel they want to do that are internally driven. This paper includes findings from our study conducted by Ipsos from July 25-29, 2011. For this survey, a national sample of 1,033 females from Ipsos' U.S. online panel were interviewed online.

WHAT WE ASKED THEM

These questions were framed in the following way:

- **Expectations:** There are many expectations of the modern woman and they come from many sources. Considering your external influences (e.g., family and friends, the media and entertainment) and the messages you are getting from these sources, please indicate how much you believe you are expected to do each of the following.
- **Motivations:** Now if you think about the little voice in your head and listen to yourself, please indicate how motivated you are to do the following.

WHAT THEY RATED

We had the women rate a number of factors that related to the areas of Do It All, Look Good, and Be Nice, along with factors that we believed were more personally driven. The factors ranged from “I believe I’m expected to ‘have a career’ and ‘make sure the household runs smoothly,’” to “I believe I’m expected to ‘be attractive’” and “I believe I’m expected to ‘be nice.’” The personally driven factors ranged from “be happy” and “be healthy” to “follow my own personal motivations” and “have balance in life.”

THE THREE TARGETS

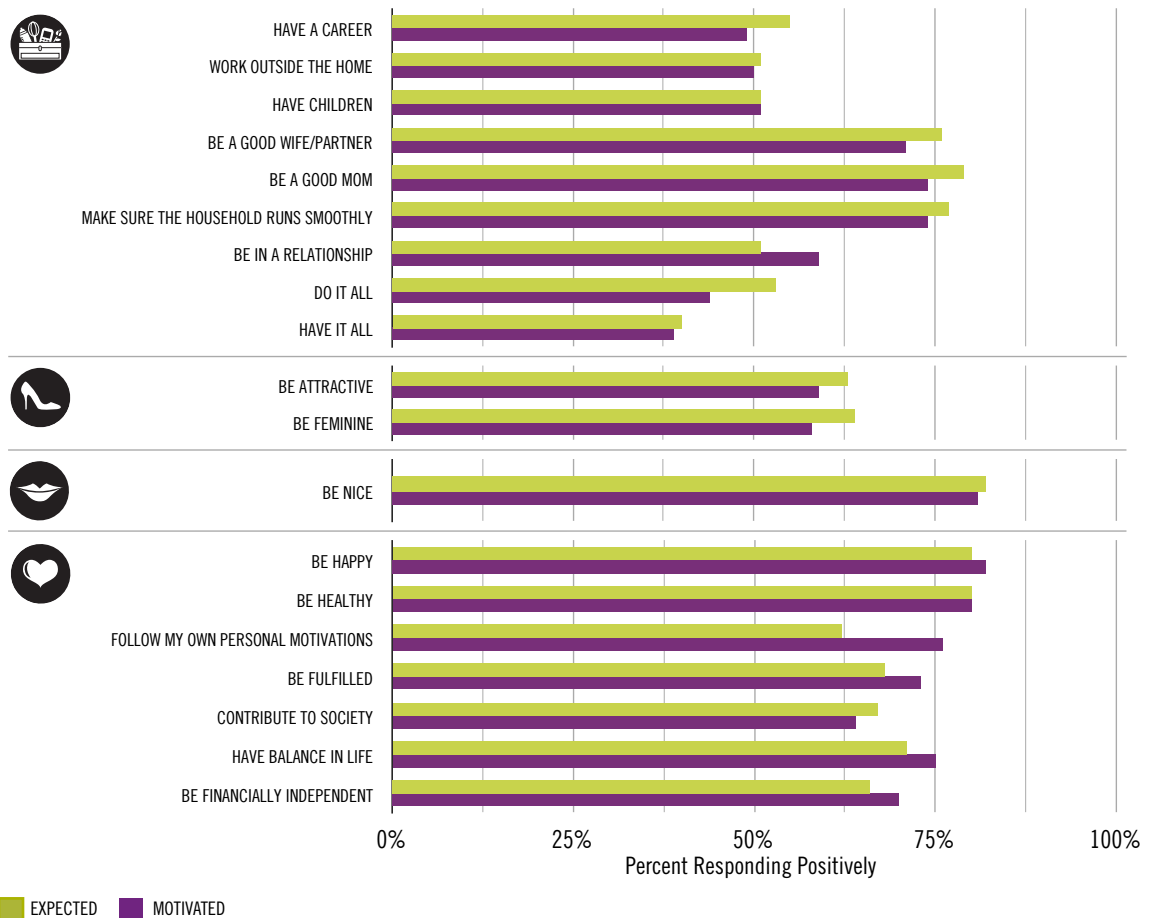
We also studied the results across the three generational target groups as noted earlier—Millennials, Generation X, and Baby Boomers. In the study, we confirmed that these target groups, despite having grown up in different decades and at different times, have certain persistent expectations

that have held over time—the expectation to do it all, to look good while doing it, and to have people like them.

SUMMARY FINDINGS

What we learned from the study first and foremost is that most women feel highly expected and motivated to do many things across all the dimensions we tested: the majority of the factors had 50% or more women agreeing that they were expected *and* motivated to do them. Also interesting is that while we found some differences in the percentages of women believing they are motivated as opposed to expected to be certain things, the percentages are closer in number than one might expect (see Figure 1). Yet, as Linda Babcock and Sara Laschever note, socialization might be the answer for this: “Socialization does such a thorough job of teaching little girls their proper role that by the time they reach adulthood, they believe that their gender-appropriate impulses and behaviors ... are intrinsic expressions of their

FIGURE 1 Across All Ages: Expectations & Motivations



Q: There are many expectations of the modern woman and they come from many sources. Considering your external influences (e.g., family and friends, the media and entertainment) and the messages you are getting from these sources, please indicate how much you believe you are expected to do each of the following, Top 2 Box
Q: Now if you think about the little voice in your head and listen to yourself, please indicate how motivated you are to do the following, Top 2 Box

Source: Anthem Worldwide & Ipsos

Nearly 75% of women feel both expected and motivated to make sure the household runs smoothly.

personalities rather than learned behavior.”²⁸

Personally Motivated

The data continues to support the fact that women today are personally motivated at a macro-level, despite believing they are expected to do many things. There is a significant difference between the percentage of women who feel compelled to follow their own personal motivations and those who believe they are expected to—76% vs. 62%.

We also found that those factors we believed to be more personally driven—being happy and being healthy—rate at the top of the list. Interestingly, women believe they are both expected and motivated to be these things.

Do It All

When we considered “do it all,” we asked direct questions around this point along with factors that tend to relate to the “do it all” notion—those relating to working outside the home, household work, relationships, and children.



When asked directly about “doing it all,” 53% of women believed they were expected to do this, while significantly fewer women were motivated to, at 44%—a nine-point gap. “Having it all” rated even lower, with only 40% of women feeling expected to and 39% motivated to have it all. Instead what we found is that more women are motivated to have balance in life (75%) and be fulfilled (73%).

When it comes to work, an equal percentage of women believe they are both expected and motivated to work outside the home, yet fewer women are motivated to have a career (49%) than believe they are expected to (55%), a six-point gap. Interestingly, in comparison, there are more women who believe they are expected to (66%) and motivated to (70%) be financially independent. This suggests for women the outcome is more important than the means of achieving it.

An even more interesting contrast to working outside the home is women’s attachment to household work. We found that the vast majority of women, about 75% of them, feel both expected and motivated to make sure the household runs smoothly.

With respect to relationships, women are motivated to be in one. Significantly more women are motivated to be in a relationship (59%) than feel expected to be (51%). Greater

than 70% of them also believe they are both expected and motivated to be a good wife/partner.

Finally, an equal percentage of women feel expected and are motivated to have children—51% for each. Of those with children in the household, 64% were motivated to have children compared to 58% believing they were expected to. Interestingly, despite these numbers, about 75% of all women feel both expected and motivated to be a good mom, and this, as one might expect, is even higher for those with children in the household at 86%.

Look Good

When it comes to looking good, there are some differences in the prevalence of women who believe they are expected versus motivated to be attractive and feminine, but fewer than one might have expected.

While 63% of women feel expected to be attractive, 59% of women are motivated to be, as well. Similarly, 64% of women feel expected to be feminine, while 58% of them are motivated to be—a six-point gap.



Be Nice

One of the most interesting findings of the survey is that a significant group of women feel both expected and motivated to be nice, 82% and 81% of women respectively.



This might imply that being nice is core to women’s character and that nature is very much involved in driving this behavioral trait. The world certainly shouldn’t expect this characteristic to change anytime soon.

Across Age Groups

Across age groups, there was more similarity than differences across the factors. The few differences we did see are noted in the following section where we discuss the three targets—Millennials, Generation X, and Baby Boomers.

This study was conducted as an Ipsos poll from July 25-29, 2011. For this survey, a national sample of 1,033 females from Ipsos’ U.S. online panel were interviewed online. Weighting was then employed to balance demographics and ensure that the sample’s composition reflects that of the U.S. female population according to Census data and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/- 3.1 percentage points 19 times out of 20 of what the results would have been had the entire female population in the United States had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.



Three Generational Targets

MILLENNIALS, GENERATION X, & BABY BOOMERS

In this paper, we considered women from three generations—Millennials, Generation X, and Baby Boomers. According to Pew Research Center, Millennials, the youngest generation covered in this paper, are those defined as having been born from 1981 to 2000. Before them comes Generation X, comprising those born from 1965 to 1980. Finally, Baby Boomers are defined as those having been born from 1946 to 1964.

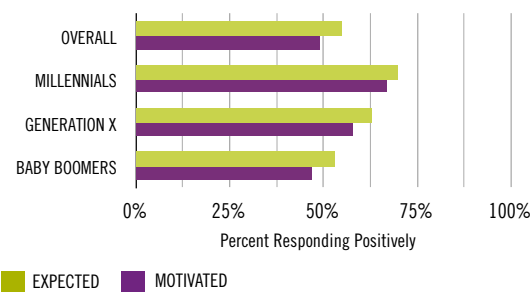
For each generation, we considered the expectations and the motivations tested in our survey. The results are reflected in the commentary below.

MILLENNIALS

“Doing it all” for Millennials means fulfillment and balance.

For Millennials, the world is their oyster, as they have energy, power, and the mindset that they can do anything. Given the progress women have made and the traits of this generation, one might think they’d be immune to expectations all together. Yet, across almost every factor more of them felt expected to do these things vs. the other cohorts. Along these lines, almost 40% of Millennial women feel added pressure to do more these days given all the

FIGURE 2 Across All Ages: Have a Career



Q: Please indicate how much you believe you are expected to “Have a career,” Top 2 Box
Q: Please indicate how much you are motivated to “Have a career,” Top 2 Box

Source: Anthem Worldwide & Ipsos

news in the last two years about the rising power of women, significantly more than Boomer women (see appendix, Figure 6 and Figure 14). One might expect this given the different life stages each group is in. It appears the recent news on women has had more impact on these Millennials whose core of life is still in front of them.

Millennials grew up at a time when they saw their own mothers or other mothers around them doing double duty. They don’t see it as new or unique, it just is. Thus they don’t seem to struggle quite as much with “doing it all” as Generation X women do.²⁹ At 65%, more of these Millennials feel expected to “do it all” than the other cohorts, and at 58%, significantly more of them are motivated to do so (see appendix, Figure 6).

This generation of women seems to expect to work and to bring home some of the bacon: only 15% of Millennial women believe a man should provide the majority of the household’s income.³⁰ Almost 70% of them, significantly more than Generation X and Boomers, are motivated to have a career, and nearly 70% of them desire financial independence (see Figure 2 and appendix, Figure 6).

Another difference with this group is apparent in how they expect to work. They’ve seen the challenges and impact of “doing it all,” and so have a tendency to desire and seek balance and fulfillment. Employers better take note, because 60% of these young women believe work-life balance is the most important decision factor in choosing a job.³¹ According to our survey, more than 80% of them seek balance in life, more than even the Generation X group (see appendix, Figure 7). This group of young women are more focused on both their own achievements and their own satisfaction, with close to 80% of them being motivated to find their own way, being more focused on making their decisions based on their own internal compass and

motivations, and 80% of them wanting to be fulfilled, both higher than any other cohort.³² For example, when it comes to work, 72% of Millennials said they work for personal and professional fulfillment.³³

This internal compass doesn’t exclude relationships and kids. In fact, for 60% of them, the greatest fear is “being alone.”³⁴ So, it’s not surprising to find that almost 50% of Millennial women aged 18-29 said that marriage/relationships was very important, and 40% of them said parenthood was.³⁵ Our survey also showed this, with almost 70% of them being motivated to be in a relationship and 60% of them motivated to have children (see Figure 4 and appendix, Figure 6).

Looking good gets passed down from generation to generation.

When it comes to looks, this may be where these young women are not immune to the pressures around them. In our survey, over 75% of Millennial women feel expected to be attractive, higher than the other two cohorts (see appendix, Figure 12). A study at Duke University also supports this view. Undergraduate women there describe the idea of “effortless perfection”: the expectation that one would be smart, accomplished, fit, beautiful, and popular, and that all this would happen without visible effort ... [They] feel pressure to wear fashionable (and often impractical) clothes and shoes, to diet and exercise excessively, and to hide their intelligence in order to succeed with their male peers.³⁶

This suggests that despite this group’s education and feelings of empowerment, they are still bombarded with “be pretty” expectations. There are reports that today’s media contributes to these views. Famous young stars who crossover from teen-idol into adulthood are often portrayed as sex objects, only to promulgate the expectations around beauty with yet another generation of girls. For example, former Disney star Hilary Duff at a young age posed in lingerie for *Maxim* magazine. Back in 2008 at the age of fifteen, Miley Cyrus, once seen as the perfect role model for young girls, posed in *Vanity Fair* in a controversial, provocative, sexual pose.³⁷

You see these expectations manifested in these girls’ behavior. According to a 2008 survey by the National Campaign to Prevent Teen and Unplanned Pregnancy, 22% of teenage girls had electronically sent or posted nude or seminude photos of themselves. It also manifests in their aspirations. Lisa Bloom, author of *Think: Straight Talk for Women to Stay Smart in a Dumbed-Down World*, reported in



The Huffington Post recently that “25% of young American women would rather win America’s Next Top Model than the Nobel Peace Prize. Even bright, successful college women say they’d rather be hot than smart.”³⁸ So despite the degrees and earning power, these young women are just as focused on turning heads as they are with filling their heads with knowledge.

GENERATION X

Generation X women bear the brunt of the “do it all” expectation, given where their generation sits between the other cohorts.

Generation X women land in between these other two generational cohorts and may just be the most conflicted of all, perhaps bearing the greatest brunt of the “do it all” pressure. As Gail Collins wrote about this generation in her book on American women, “[They are] American women who [have] grown up confident that they were entitled to all the educational and career opportunities that boys got...

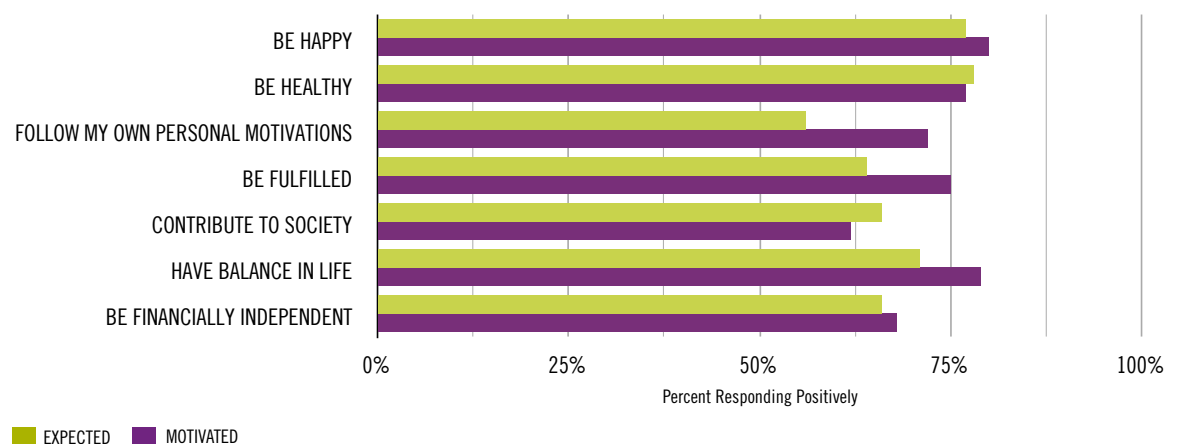
and who expected to have success and love and adventure in equal measure.”³⁹ She describes this as an amazing outcome, yet for many Generation X women it has resulted in a lot of pressure and internal conflict.

Our survey confirms this sentiment. These Generation X women exhibit the biggest gap—12 percentage points—between those who feel expected to do it all and those who are actually motivated to do so—61% and 49% respectively (see appendix, Figure 9). And while many of them are still motivated to have a career, be a good wife/partner, and be a good mom, there are fewer women who actually feel motivated to do so vs. feeling expected to.

But the reality is, these women are doing it all—they are working, want to be in a relationship, want kids, and actually want to help the household run smoothly. Like most women, three-quarters of the women in this age group are working outside the home and have careers.⁴⁰ They want to be in a relationship and want to have children. Our survey found that more women feel “motivated to” than “expected to” be in a relationship, and while the percentage of married adults in this age group has decreased over time, the reality is the majority are married, over 60% of adults in this cohort.⁴¹ In addition, about 60% of the Generation X women in our survey are motivated to have children. Interestingly, this group, despite common complaints about having to do all of the above and take care of things at home, is also both expected and motivated to make sure the household runs smoothly—in equal measure.

Generation X women, however, recognize and are quite aware that they are playing a losing game. A survey

FIGURE 3 Generation X: Personally Driven Factors - Expectations & Motivations



Q: Please indicate how much you believe you are expected to do the following, Top 2 Box
Q: Please indicate how motivated you are to do the following, Top 2 Box

Source: Anthem Worldwide & Ipsos

Among
Generation X
women, 72%
are motivated
to follow their
own personal
motivations,
compared to
56% feeling
expected to.

completed by *Advertising Age* found that almost 50% of women said that balance is a “joke” for working women.⁴² Our survey found that Generation X women, compared to the other two generations of women, show the biggest gap between those who are motivated to have balance and those who feel expected to (an 8-point gap, 79% – 71%; see appendix, Figure 7). In addition, those with children tended to be more motivated to have that balance compared with those without children. It’s paradoxical that these women even feel expected to have balance, seemingly seen as yet another thing they have to do.

The point is these women are busy and need help. Just over 40% of Generation X women in our survey agreed with the statement, “I need help getting done everything that’s on my plate in a day.” Almost 50% of these women also agreed, “I wish companies provided services that would help me fit everything into my day.” What’s good for marketers is that almost 50% of these women also said they’d pay more for products that make their life easier (see appendix, Figure 15).

So perhaps it’s not surprising to learn that two-thirds of women believe that “having it all” is subjective, that it really needs to be defined on their terms.⁴³ Some women are getting more comfortable with wearing all the hats they do and the compromises they have to make.⁴⁴ And others still struggle with it. Quoting from Gail Collins’ work, a Boston bank executive with two daughters said, “You second-guess yourself at work, you second-guess yourself at home, and you second-guess yourself in terms of your own personal time.”⁴⁵

Maria Shriver’s conclusion in *The Shriver Report* was that “women are learning they no longer have to shoehorn themselves into one stereotype or another, but they can do so if they choose—or they can make it up as they go along.”⁴⁶ In further support, our survey found that Generation X women are leading the way in being more focused on making their decisions based on their own internal compass and motivations. When considering personal motivations, Generation X women have the biggest point gap between expectations and motivations—72% of them are motivated to follow their own personal motivations compared to 56% of them feeling expected to, a 16-point gap, greater than that for Millennials and Boomers. It’s similar with fulfillment—75% of them are motivated to be fulfilled vs. 64% feeling expected to, again a greater gap than the other two generations (see Figure 3). Combine these findings with the fact that like the other cohorts these women first and foremost want to be happy and healthy.



And yet, even if women follow their own compass, it seems as if they really can never win. Even when they do set their own course and when they do appear to have it all under control, they are under scrutiny and still questioned on how they balance it all. From movie stars to single, working moms everywhere, they can all be subjected to the question, “How are you possibly pulling it off?”⁴⁷

You would think looks would be the one thing these women let go of, but the pressure is still there and for some leads them to taking surgical measures.

When it comes to looking good, Generation X women follow the other cohorts. They generally feel expected and are motivated to be attractive and feminine. About 60% of them are motivated to do so, yet like the others there are more who actually feel expected to look good. Some moms, whether driven by expectation or motivation, have acted on these beliefs leading to the rise of what some call the “mommy make-over,” plastic surgery procedures conducted after childbirth. These tend to be tummy tucks, breast lifts, and breast augmentations.⁴⁸ It suggests that really no age group is immune to wanting to look better than before.

BABY BOOMERS

Baby Boomers will work and are actively seeking love.

Despite their life stage and their life experiences, our survey found that Baby Boomer women fall prey to expectations just as much as younger women, while still being quite motivated, as well. About three-quarters of Baby Boomer women are motivated to follow their own personal motivations and to be fulfilled. As one might expect, these women also hold the highest hopes for future generations of women, wanting future generations to know they can do

whatever they want in life and wanting them to always be in a position to care for themselves, while also not putting too much pressure on themselves (see appendix, Figure 16).

Despite this time in their life, or perhaps because of it, fewer Boomer women, like the other generations, are motivated to “do it all” than feel expected to, according to our survey, with the fewest of them across the generations rating it highly. This doesn’t mean these women won’t work. More than 50% of them are motivated to work, and 70% of them are motivated to have financial independence (see appendix, Figure 11).

As a matter of fact, many Boomer women are still actively working or are seeking the opportunity for their second act. Today we find close to 25% of women 50 and older working outside the home.⁴⁹ In addition, almost 60% of working Boomers believe they’ll continue working into their retirement years.⁵⁰ Yet Boomers’ reason for working can differ—the majority believe they’ll work part-time for added income, while others will work for personal interest or enjoyment. Hillary Clinton has been a great role model for Baby Boomer women, demonstrating that it’s never too late to pursue your dreams and work tirelessly in a demanding job.⁵¹ As a matter of fact, Mrs. Clinton is more popular than ever—she’s the second-most admired woman in America after only Oprah Winfrey, according to a *Newsweek* poll of women from February 2011.⁵²

When it comes to love, 35% of all Boomers have been divorced, with this group making up the majority of American divorcees.⁵³ Maybe that’s why we found in our survey that 60% of Baby Boomer women were motivated to be in a relationship, representing the biggest gap between expectations and motivations across the age groups (see Figure 4). These women are not out of the game; rather they are seeking love. Supporting this point, we find older users frequenting online dating sites more than other age groups to find a mate.⁵⁴ Research firm comScore reported that users of online dating sites who are 50 and older have grown twice as fast as all other age groups.⁵⁵ These Boomers don’t want to stay single.

Baby Boomers know that looks still matter, but the beauty industry isn’t thinking about them enough.

Baby Boomers are also not immune to the message that looks matter. Our survey shows that almost 60% of them feel expected to be attractive and feminine (see appendix, Figure 12 and Figure 13). Even Gloria Steinem, the feminist activist, has said: “The part that’s hurtful is that having

FIGURE 4 Across All Ages: Be in a Relationship



Q: Please indicate how much you believe you are expected to “Be in a relationship,” Top 2 Box

Q: Please indicate how much you are motivated to “Be in a relationship,” Top 2 Box

Source: Anthem Worldwide & Ipsos

worked hard and continuing to work hard at 73, I still find accomplishments attributed to my appearance. I would have thought I could outgrow that by now.”⁵⁶ Again, women with smarts can still be burdened by their looks being considered a factor in their success, even later in life.

In contrast, another Boomer woman, Rene Russo, on an interview on *The Tonight Show*, seemed to lament that in her 50s she is not commended for her continued great looks. Instead she is now considered for roles as an older mom, not the sexy vixen she was cast as in prior decades. She said, “The first thing I was cast for [when I returned to acting] was a mother of like these two hot boys, which was awkward and kind of weird ... I’m not going to lie. It was absolutely awkward and strange ... I have to do a scene with him, like as his mother. And I’m like, ‘Have I been gone that long?’ ... It’s like, ‘Where’s the love scene?’”⁵⁷

And yet Baby Boomer women feel they’ve been ignored by the beauty industry, which they believe is more focused on youth. About two-thirds of women 50 years old or older feel “forgotten” by the beauty industry, and 70% of them aren’t interested in buying products targeted to younger women.⁵⁸ The AARP reported, “A majority of our members tell us that looking young is a priority and that they research beauty products on their own because they find beauty product advertising to be unrealistic.”⁵⁹ Boomers have a need, but aren’t being spoken to in a way that resonates with them.



What Does This Mean For the Marketer?

In today's age, how marketers communicate with women should evolve.

When considering communications towards women today, it seems that the media, the entertainment industry, and advertisers alike have not kept up with women's progress. What one sees and reads more often than not is that these influential institutions continue to emphasize the persistent expectations of doing it all, looking good, and being nice. Marketers have a choice—they can either continue to tap into these expectations that seemingly won't go away, partly due to their own marketers' efforts, or a greater opportunity may lie in being able to make the leap to more realistic communication with women that taps into their true motivations, which may have more power and success in today's more authentic consumer world.

THE STATE OF COMMUNICATION

The way the world communicates with women hasn't changed enough. The media, the entertainment industry, and even advertisers have not kept up with the complexity and changing roles of women today. Case in point: despite so many women working outside the home for the last 30 to 40 years, it's surprising that soap operas are just now going off the air.

Some believe that women don't feel as if they are truly seen and heard by these outlets.⁶⁰ Maria Shriver reported in 2009 that women "feel increasingly isolated, invisible, stressed, and misunderstood."⁶¹ Instead, communications seem to perpetuate the stereotypes of women that contradict women's newfound strength. Sandy Sabean, chief creative officer at New York-based boutique Womenkind, which promotes its work as "decidedly not from Adam's rib," describes the current state: "We haven't really changed the image of women since the '50s. ... There are huge gaps. Women are either portrayed as moms or sex kittens, and when you do see a professional woman, it's the cliché mom with a briefcase and baby. It's a lot more complex than that."⁶²

The majority of women in the U.S. would agree. About 60% of the women in our survey agreed that the media, entertainment, and marketing advertisements don't accurately represent women of today.⁶³ From G-rated movies to movies targeted to young women to television shows and marketing advertisements, the messages tend to focus more on how a woman looks, not her achievements. A woman's focus seems to be more about getting a man to like her versus following her own heart and reaching her own goals.

SUGGESTED APPROACH

Marketers can consider more sophisticated communication towards women that taps into their true motivations, as this may have more power and success in today's more authentic world. Women may not appreciate the pressures they feel from advertisers and might rather appreciate communication that speaks to their motivations. In fact, in our survey, 75% of women stated that they would prefer genuine, real communication from brands (see appendix, Figure 14).

What might that mean? To start, marketers can consider focusing first on the foundation of what product marketing is about in the first place—focusing on solving a consumer's problem or meeting her needs and desires. In doing so in an honest, trustworthy, and authentic way, a brand will deliver on needs that meet motivations, instead of reinforcing expectations, that then allow it to enter a conversation with women that builds stronger, deeper connections and loyalty. When it comes to marketing communication, women today are cynical and quite savvy. Like the rest of the population, they are weary from lack of trust in institutions built up over time, and they are empowered with today's communication vehicles to expose falsehoods. Perhaps it's no wonder that women represent an influential, strong group of bloggers; it could be they

want to drive the change towards more real and authentic communication, because today they may only trust each other to get the truth and truly sound advice devoid of suggestion.

To speak to these women, a consideration for motivating messages can be the hopes women hold for future generations of women. Hopes are a feeling of desire for a certain thing to happen, and for this paper, we considered five key "hope" statements that relate to the areas of doing it all, looking good, and being nice, and found the following:⁶⁴

- 91% of these female respondents hope that women know they can do whatever they want in life⁶⁵
- 89% of them hope that women will always be in a position to care for themselves
- 87% of them hope that women have a marriage/relationship that's a partnership
- 84% of them hope that women don't put as much pressure on themselves
- 74% of them hope that women embrace their femininity

These are empowering statements that suggest freedom of choice and strength while still allowing women to clearly be women. These hopes are in alignment with our earlier findings that women want to follow their own personal motivations and not be judged by them—they should know that "they can do whatever they want in life" and not "put as much pressure on themselves." (See appendix, Figure 16). And while they do whatever they want, they want to have security, in line with our findings that these women want financial independence to be able to "care for themselves." That doesn't necessarily mean being alone—again, women tend to want to be in relationships, but ones that are more of a "partnership" may be more realistic for all that couples juggle between themselves today. Finally, given women's newfound power, it's time that women "embrace their femininity," rather than seek success by behaving in accordance with old stereotypes or like a man in what used to be a man's world.

These hopes suggest to marketers that there are opportunities to provide products and align communication to the fact that women play a host of roles, that they are competent and capable, that they need support while taking on their dreams, and that their influence in the world is changing and is true to their inherent talents. Products

FIGURE 5 Motivating Statements

Percent Responding Positively to the Following Statements:

Statement	Overall	Millennials (A)	Generation X (B)	Baby Boomers (C)
True beauty exists at all ages	80%	74%	72%	82%AB
Life is what I make of it	80%	73%	76%	82%A
Inner-beauty is just as important as outer-beauty	76%	67%	71%	78%AB
Confidence is beautiful	76%	77%	73%	76%
'Me' time is important time	68%	65%	67%	71%
Make your life work for you	68%	63%	64%	71%A
Making life easier so you can focus on the things important to you	67%	62%	65%	69%
Love yourself first	67%	64%	65%	69%
Beauty is making the most of what you've got	66%	60%	61%	68%A
Good for you, good for the world, good all around	46%	47%	46%	45%
No one tells you that as you age, each decade actually gets better	41%	35%	40%	44%A
Life's just getting started	41%	57%CD	48%CD	38%D
Love is getting to your 50 th wedding anniversary	40%	45%	38%	38%
Life's so busy—take me away!	29%	36%D	33%D	31%D
Women get all the best roles in life	19%	29%CD	30%CD	15%D

Q: How motivating is each of the following statements to you personally?, Top 2 Box

Source: Anthem Worldwide & Ipsos

can support all they want to do and empower them to do so, while communications can present women as they see themselves instead of how our culture, inculcated by the persistent expectations, sees them.

We tested a number of messaging statements that can give marketers a jumping off point for positioning, product, and communication ideas, which can be complemented with learning around a specific category or need state. We believe these statements, based on this research, can be more motivating to these generations of women, as that's what we found—that many of the messages were quite motivating and resonated across age groups. Again, these can serve as clues as to what types of messages might be of more interest to today's women (see Figure 5).

Many of the most motivating statements were around beauty, with four of the nine statements that rated over 60% agreement falling into this category:

- True beauty exists at all ages.
- Inner beauty is just as important as outer beauty.
- Confidence is beautiful.
- Beauty is making the most of what you got.

Three of the top nine statements centered on personal motivations:

- Life is what I make of it.
- Make your life work for you.
- "Me" time is important time.

The final two of the nine touch upon balance and love and relationships:

- Love yourself first.
- Making life easier so you can focus on the things important to you.

Finally, when speaking with these women, marketers should also remember that some of the motivations vary across the generations.

For Millennials, consider the fact that they are looking for fulfillment and meaning. Empowerment means helping them take on the world, contribute to it, and lead a fulfilling life. Given this and their stage in life, it's not surprising to find that more of them rated "Life's just getting started" as quite motivating.

For Generation X women, empowerment means helping them juggle all they have on their plate, making life easier with products and services, and helping them deal with the inherent conflict they constantly feel and the trade-offs they constantly make. While women may want to work or have to work, those working outside the home are clearly stretched. According to a Gallup Poll, these women are more likely than working men to feel they don't have enough time in the day, are not well-rested, and experience a lot of stress.⁶⁶ Instead of judgment or expectations, women would be more motivated by communication that supported the choices they have to make and want to make. The balanced and personally motivating statements noted earlier would resonate well with this group (see Figure 5).

For Boomers, empowerment means helping them make the most of this time in their life and supporting them in being who they are, especially when it comes to beauty. These women are older and wiser, so more Baby Boomers than the other generations were motivated by the following statements:

- Life is what I make of it.
- Make your life work for you.
- True beauty exists at all ages.
- Inner beauty is just as important as outer beauty.
- Beauty is making the most of what you got.

IN THE END, WHAT SHOULD A MARKETER DO?

Regardless of the generation, there is an opportunity to market and communicate with today's woman in a more profound and relevant way to build connections and commitment. At a sociological level, we know that brands contribute to cultural development and, therefore, can infer that brands themselves influence and contribute to the things women believe they are expected to do. Brands have the opportunity to influence women to have more positive expectations for themselves, ones that are more in line with their own motivations.

One brand that can serve as an example is Dove, which has continued its longstanding "Real Beauty" campaign. The campaign resonated strongly with women, perhaps even more strongly with those who historically felt ignored by the beauty industry and with this campaign finally felt understood. The marketing campaign was real on many levels and true to many women's beliefs and motivations. Dove's campaign was based on studies they commissioned to "not only [explore] real beauty and the impact of beauty ideals, but also [to uncover] solutions—in the hopes of

positively influencing the process of beauty socialization for future generations of young girls." The company wanted to "embrace healthy, authentic and positive ways of being beautiful."⁶⁷ Around this more empathic and real understanding of women, Dove shaped its brand identity, resulting in deeper consumer loyalty and business growth. It is a strong proof point that deeper understanding can result in positive impact on many levels—for women, for society, and for the brand itself.

To take steps in the right direction, marketers can ask the following questions:

1. Are we clear on our brand's consumer target across the generations of women?
2. Are we targeting a need state that is consistent across generations or that may change based on the age of the target group?
3. Have we researched deeply and empathically to get at the root of our target's true internal motivations?
4. Are we considering that motivation stripped of what might be considered old norms and stereotypes, the expectations that might be engrained in our culture?
5. Are our product solutions solving the needs and desires of today's women and the realities of their hopes and motivations?
6. Are we constantly engaged with our consumers to listen well to best understand their needs?
7. Are we engaging women sufficiently in our brand building and rewarding them for their feedback?
8. Is our communication genuine and real, not prescriptive or cliché?
9. Are we representing real women, not ideals?
10. Would a woman herself say what our brand is saying, perhaps posting it on a blog to her fellow women?

These questions, combined with the earlier motivating messages, can provide marketers a place to start building deeper, stronger relationships with today's women across all generations.

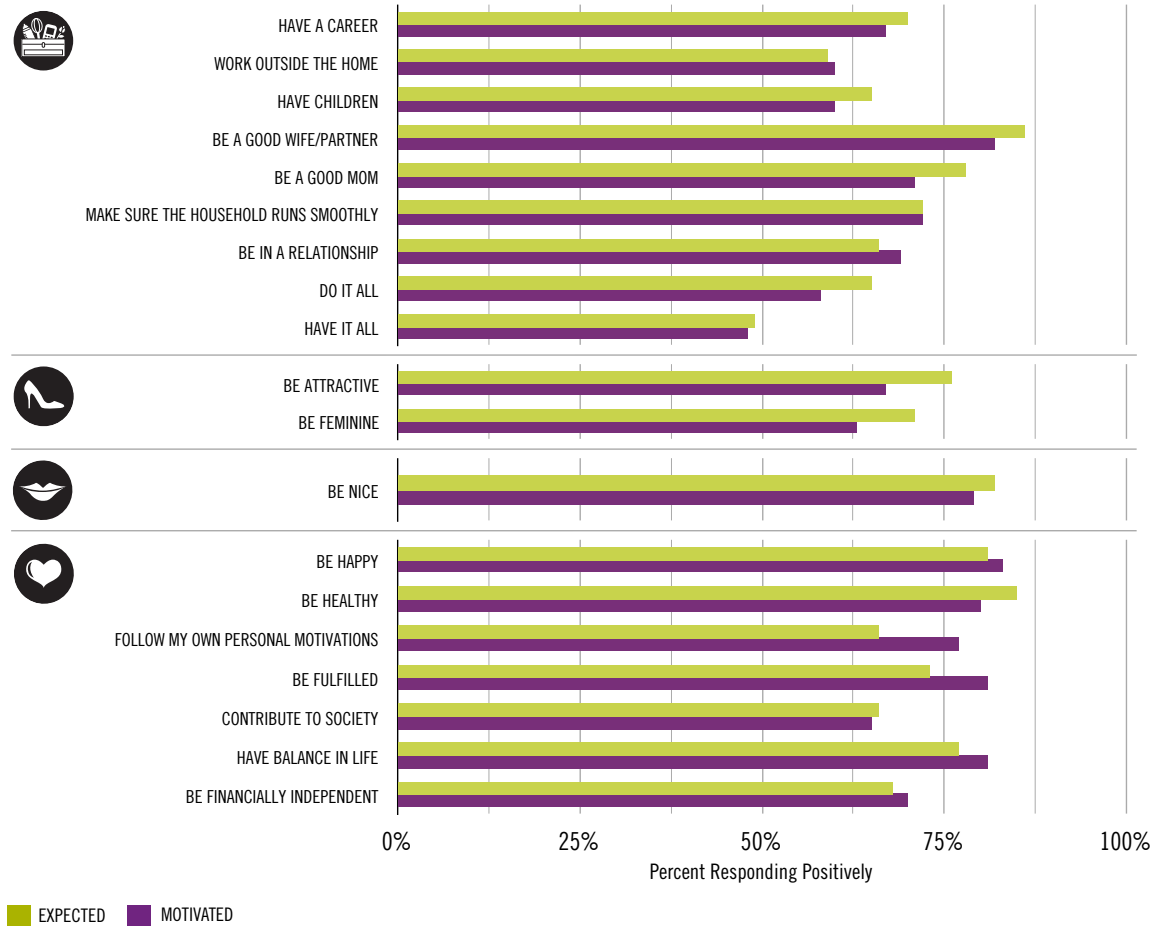
In Conclusion

American women are at a defining, empowering moment in history. They are a strong force in the workplace, at home, with families, and in relationships. On one hand, despite much progression, women may never get away from having many balls up in the air. On the other, that doesn't mean that women won't start calling their own shots. They are personally motivated, and they want to make their own choices and not be judged by them.

What we learned in this study is that there may be a new way to market to women across all generations—a way that is in line with women's desire to set their own course. Whether they believe they need to adhere to certain expectations, there may be a more powerful way, as our examples show, to market to women's motivations instead of continuing to reinforce the traditional stereotypes of the “do it all, look good, and be nice” woman. Marketers have an opportunity to evolve their approach by having better dialogue with women—a dialogue based on a foundation of empathic understanding rather than speaking to them from simply an informed vantage point.

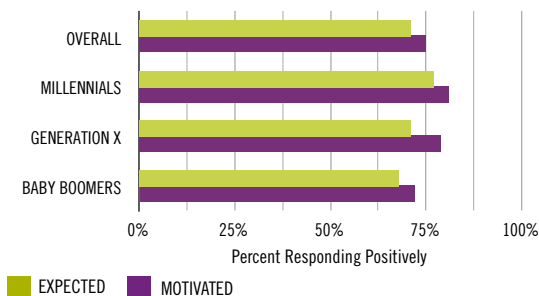
Appendix

FIGURE 6 Millennials: Expectations & Motivations



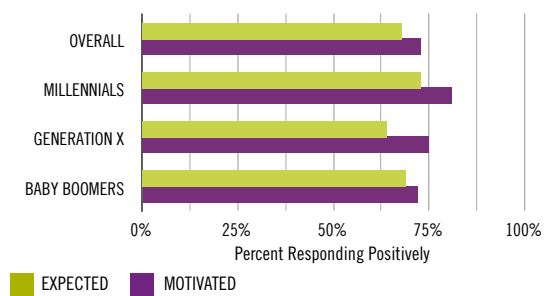
Q: There are many expectations of the modern woman and they come from many sources. Considering your external influences (e.g., family and friends, the media and entertainment) and the messages you are getting from these sources, please indicate how much you believe you are expected to do each of the following, Top 2 Box
 Q: Now if you think about the little voice in your head and listen to yourself, please indicate how motivated you are to do the following, Top 2 Box

FIGURE 7 Across All Ages: Have Balance In Life



Q: Please indicate how much you believe you are expected to do each of the following: "Have balance in life," Top 2 Box
 Q: Please indicate how much you are motivated to do each of the following: "Have balance in life," Top 2 Box

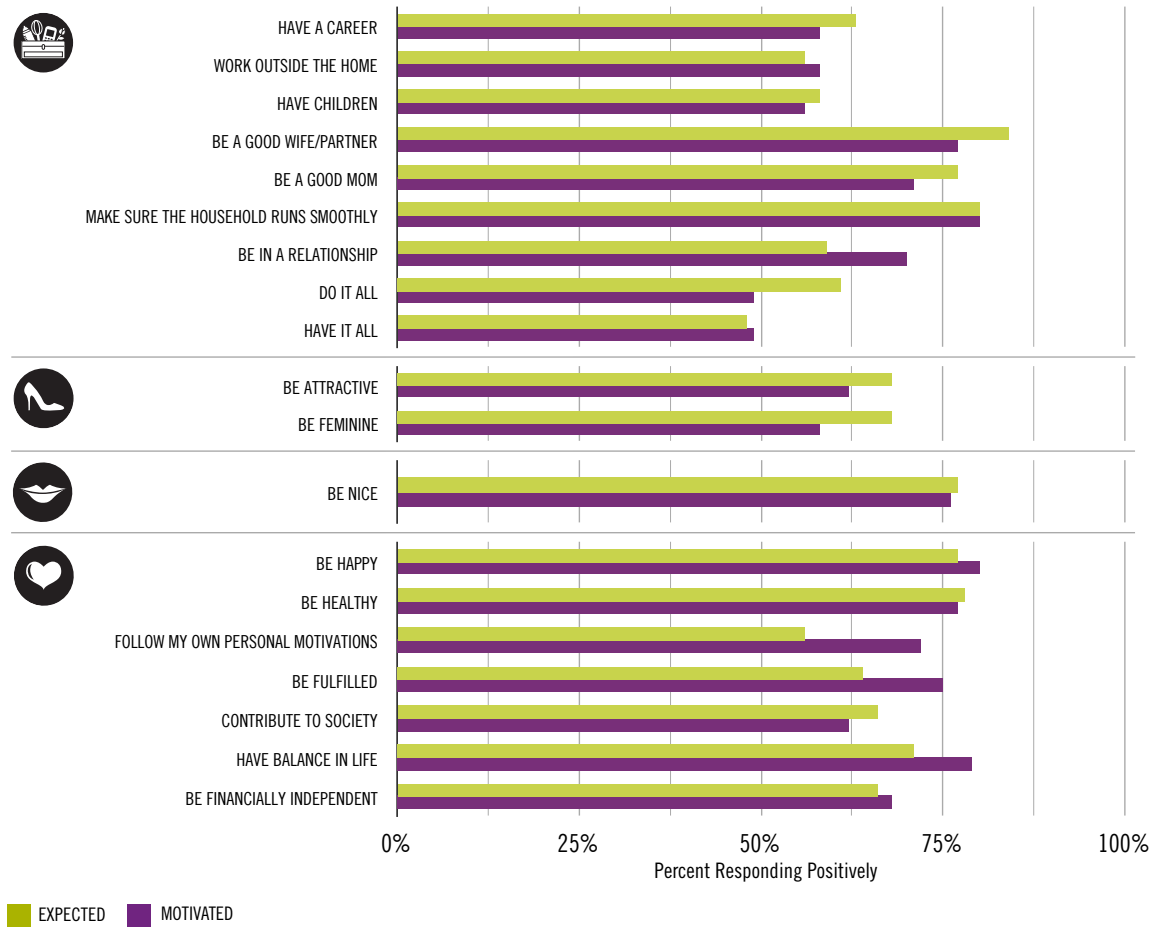
FIGURE 8 Across All Ages: Be Fulfilled



Q: Please indicate how much you believe you are expected to do each of the following: "Be fulfilled," Top 2 Box
 Q: Please indicate how much you are motivated to do each of the following: "Be fulfilled," Top 2 Box

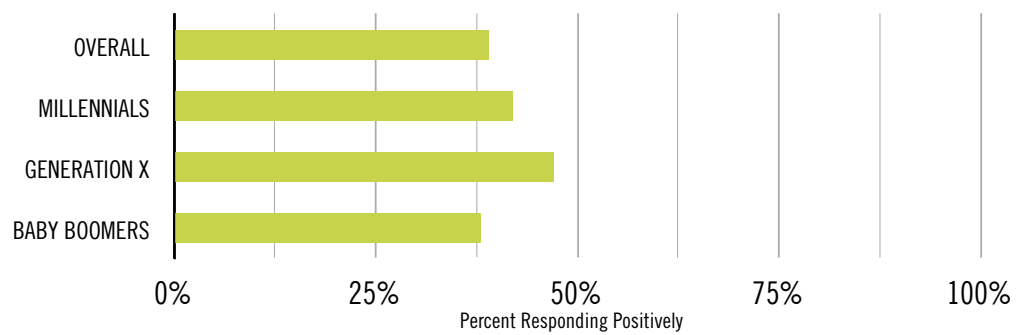
Source For All: Anthem Worldwide & Ipsos

FIGURE 9 Generation X: Expectations & Motivations



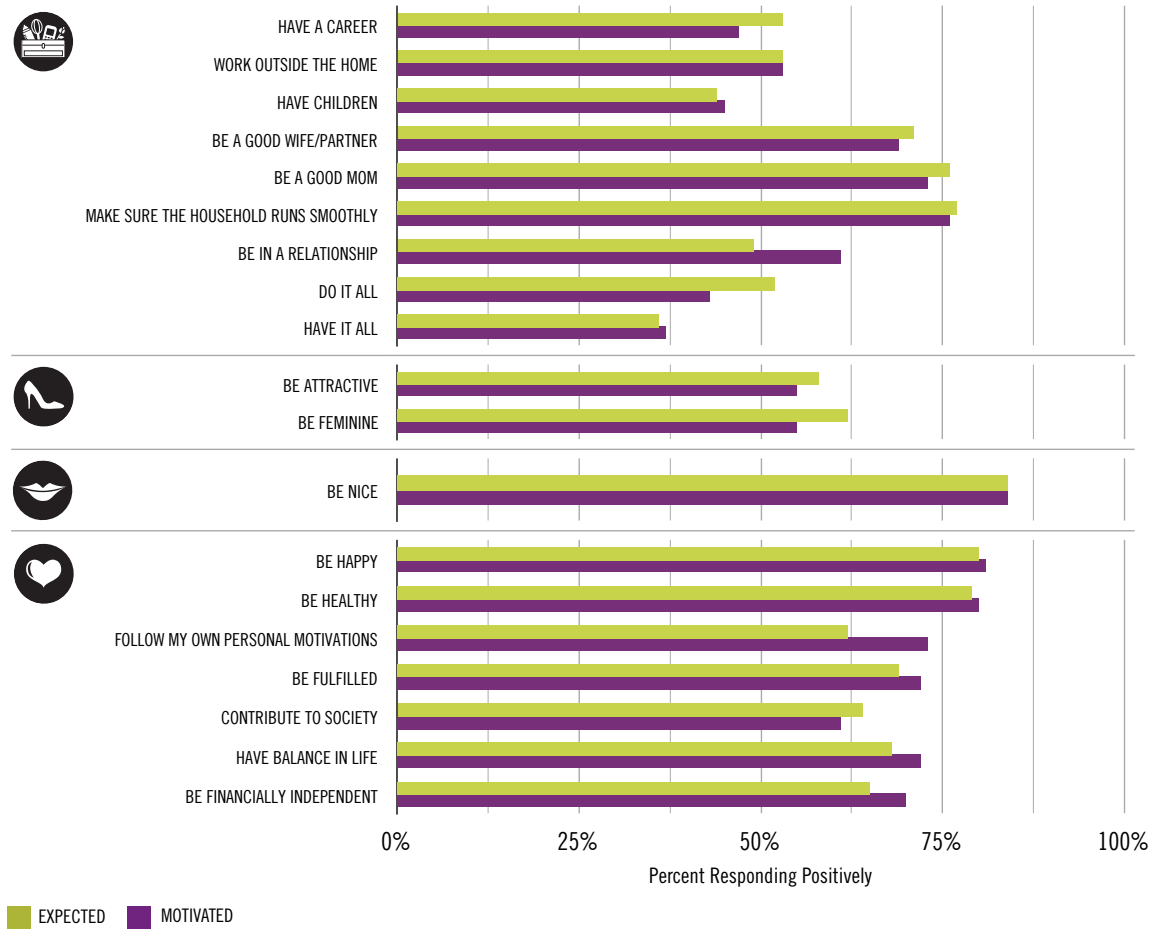
Q: There are many expectations of the modern woman and they come from many sources. Considering your external influences (e.g., family and friends, the media and entertainment) and the messages you are getting from these sources, please indicate how much you believe you are expected to do each of the following, Top 2 Box
 Q: Now if you think about the little voice in your head and listen to yourself, please indicate how motivated you are to do the following, Top 2 Box

FIGURE 10 Across All Ages: “I’ll pay more for products that make my life easier”



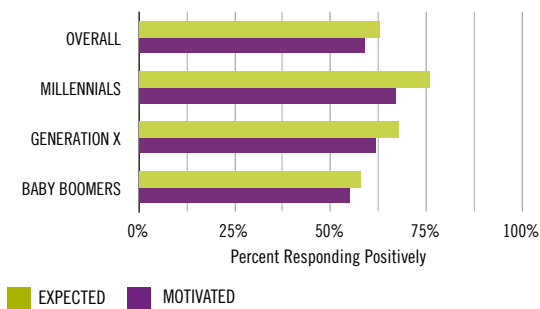
Q: Please indicate how much you agree or disagree with each of the following statements?, Top 2 Box

FIGURE 11 Baby Boomers: Expectations & Motivations



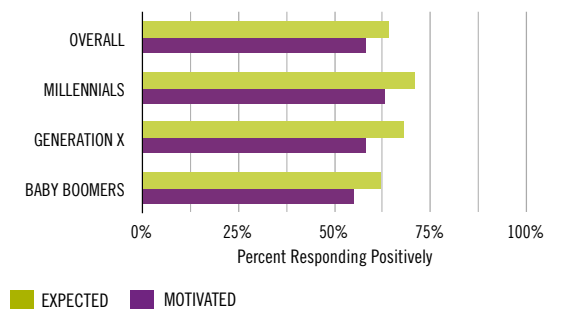
Q: There are many expectations of the modern woman and they come from many sources. Considering your external influences (e.g., family and friends, the media and entertainment) and the messages you are getting from these sources, please indicate how much you believe you are expected to do each of the following, Top 2 Box
 Q: Now if you think about the little voice in your head and listen to yourself, please indicate how motivated you are to do the following, Top 2 Box

FIGURE 12 Across All Ages: Be Attractive



Q: Please indicate how much you believe you are expected to do each of the following: "Be attractive," Top 2 Box
 Q: Please indicate how much you are motivated to do each of the following: "Be attractive," Top 2 Box

FIGURE 13 Across All Ages: Be Feminine



Q: Please indicate how much you believe you are expected to do each of the following: "Be feminine," Top 2 Box
 Q: Please indicate how much you are motivated to do each of the following: "Be feminine," Top 2 Box

FIGURE 14 Across All Ages: Tested Statements

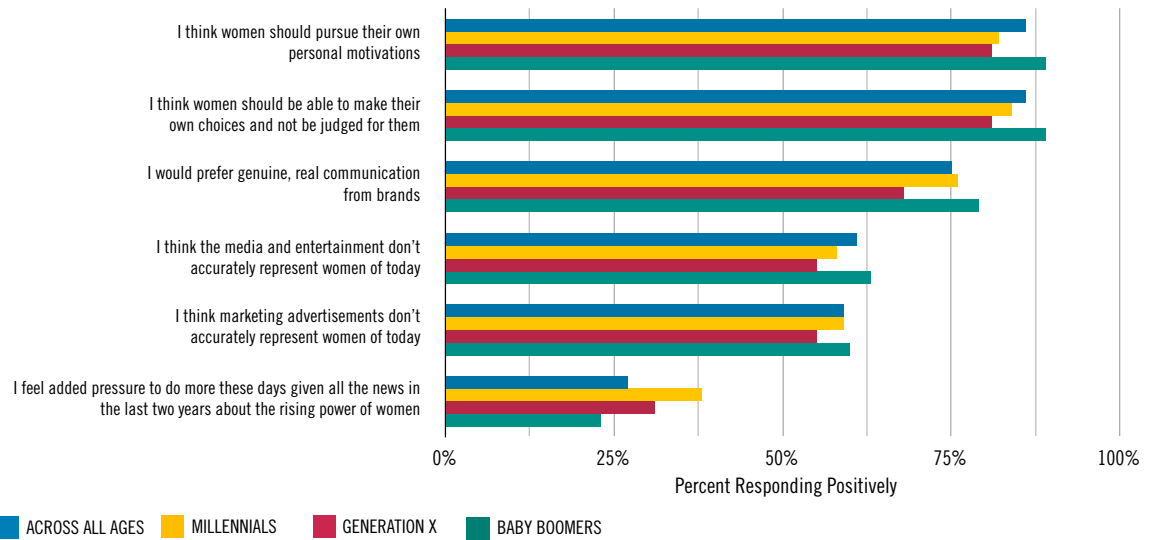


FIGURE 15 Across All Ages: Tested Statements

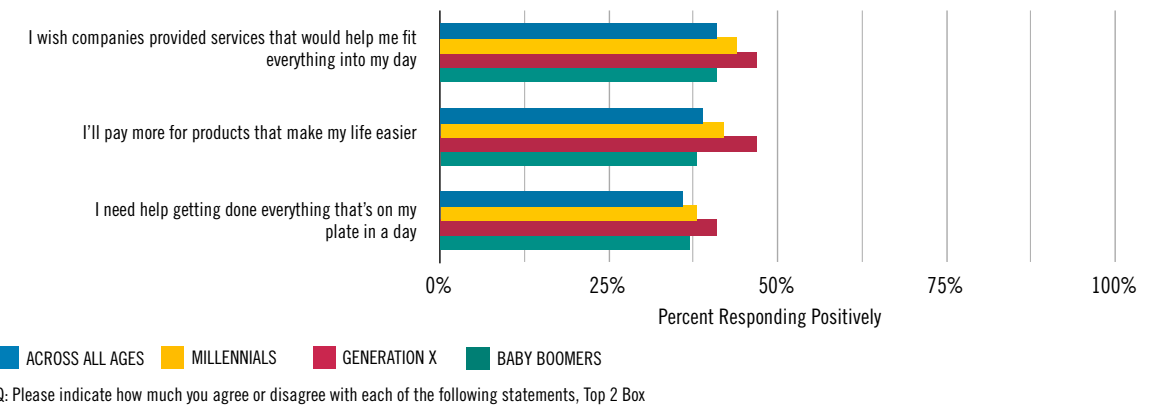
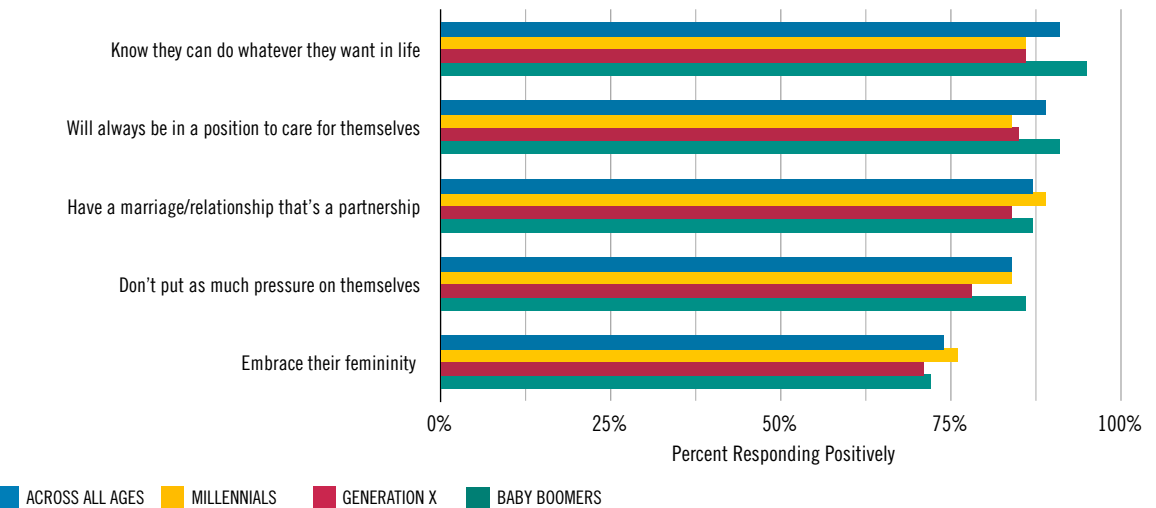


FIGURE 16 Across All Ages: Hopes for Future Generations of Women



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