

THE NEW FEMALE CONSUMER:

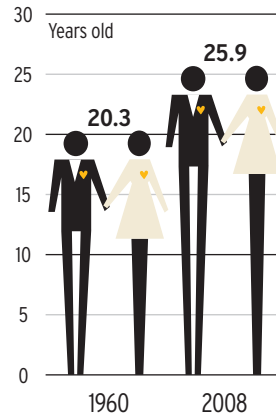
THE RISE OF THE REAL MOM

Still targeting 'Supermom'? For younger generations of mothers, having it all doesn't mean doing it all

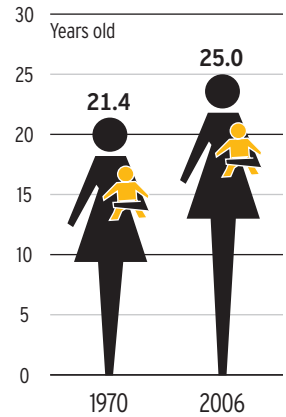
By **MARISSA MILEY** and **ANN MACK**
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WOMEN THEN AND NOW

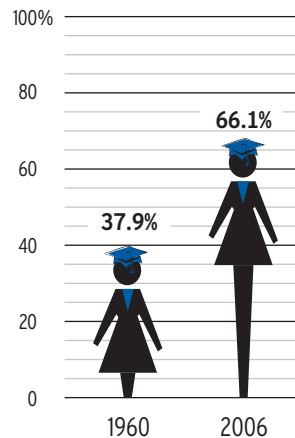
WHEN THEY WED



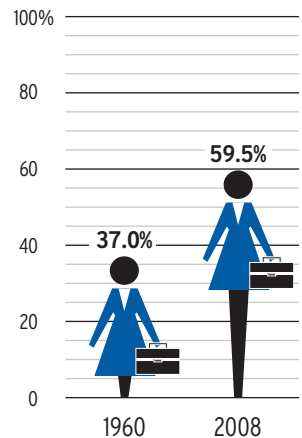
WHEN THEY STARTED HAVING KIDS



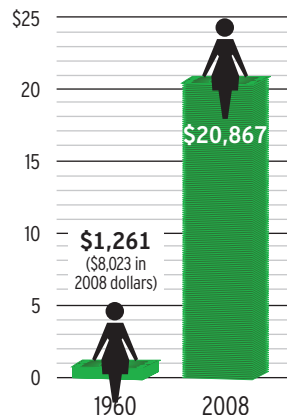
HOW MANY WENT ON TO COLLEGE AFTER HIGH SCHOOL



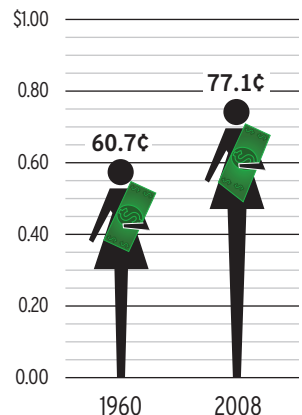
HOW MANY WORKED



HOW MUCH THEY MADE (IN THOUSANDS)*



HOW MUCH THEY MADE FOR EVERY DOLLAR MEN MADE



*Median for all women, not just those in the labor force. Sources: U.S. Census Bureau, National Center for Health Statistics, National Center for Education Statistics, U.S. Bureau of Labor Statistics

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“The New Female Consumer: The Rise of the Real Mom” is one in a series of white papers published by Advertising Age. To see other Ad Age white papers and obtain additional copies of this white paper, go to AdAge.com/whitepapers

ABSTRACT

This Advertising Age and JWT white paper explores what multiple generations of American women want when it comes to family, work and life in the 21st century, decades after the women’s liberation movement. It focuses in depth on Generation X (ages 30 to 44) and millennial (ages 18 to 29) mothers and how they differ from their older counterparts. It also examines how marketers can and should improve communications that target this demographic. This paper is based on a quantitative study of 870 men and women 18 and older conducted July 7-14, 2009, using SONAR, JWT’s proprietary online research tool. (All data have been weighted to 2007 census estimates across gender, age and household income.) It is also the cumulative work of interviews with more than a dozen marketers and experts, as well as qualitative research conducted with women around the country via the video-based community ExpoTV.

INTRODUCTION

In 1968, Philip Morris introduced a new product line to the market: Virginia Slims, the slender “cigarette for women only.” To promote the line, Philip Morris built on the energy of second-wave feminism and cleverly co-opted much of the movement’s language. The result: “You’ve come a long way, baby,” a powerful and long-lasting advertising campaign that juxtaposed photographic images of the inhibited, unhappy women of yesteryear with the liberated, empowered women of the day.

More than 40 years later, American women have come an even longer way. They are highly educated in greater numbers than ever before; they are working professionals climbing the ranks; they are the privileged product of generations of women who have fought for equality in and outside the home. Yet as much as they have changed, in many ways they are the same. Today’s woman is still the designated chief operating officer of the home.

As this Advertising Age and JWT white paper will explore in depth, women with children still handle the bulk of the household and child-care responsibilities, the so-called “second shift”—whether they are working full time, staying at home or something in between. Even younger women consider marriage and parenthood more important than men their age.

The fact is, no matter how progressive they are, women are up against something that just won’t budge: biology. Motherhood will always distinguish most women from men and put them at the center of home and family life. While that’s not necessarily a bad thing, many mothers, especially working mothers, are time-crunched and stressed, putting in long hours at work and at home.

Much can be said about the need for corporate change—a move away from the traditional 9-to-5 and toward flex time and telecommuting, an embrace of family leave for mothers *and* fathers—but that is not the business of this paper, which focuses on how marketers can change their strategies to more effectively communicate with these women.

This paper is based on a quantitative study of 870 men and women conducted in July 2009 using SONAR, JWT’s proprietary online research tool. (All data have been weighted to 2007 census estimates across gender, age and household income.) It is also based on interviews with more than a dozen marketers and experts about the study’s results, as well as qualitative research conducted with women around the country via the video-based community ExpoTV. It explores what women want when it comes to family, work and life in the 21st century—decades after the

women's liberation movement. And it focuses in depth on Generation X and millennial mothers and how they differ from their older counterparts.

Increasingly, Gen Xers (ages 30 to 44) and millennials (ages 18 to 29) are not beholden to perfection. Having seen their predecessors exhaust themselves trying to achieve an elusive ideal—the corner office, 2.5 well-groomed children at home and Julia Child's command of the kitchen—these younger mothers realize that “having it all” does not require doing it all.

While a decade ago mothers aspired to be “Supermom,” today's mothers aim to be pragmatic, efficient and rooted in reality. They want to be real moms. (That lowercase is intentional; these women don't need fancy titles.) Perhaps more importantly, they want to be real women, with interests that include and extend beyond their roles as caretakers, providers and nurturers.

In this way, real moms look to subvert the so-called “mommy trap,” where a mother has to choose whether to forfeit a career to care for the kids or plow ahead at work and hand over the stroller reins to the nanny. Real moms understand that tradeoffs are implicit in motherhood; they just don't see things as black and white.

Real moms still have unmet needs—as women and mothers. Boston Consulting Group estimates that women control \$4.3 trillion of the \$5.9 trillion in U.S. consumer spending, or 73% of household spending. To reach this demographic, marketers need not just to communicate that the goods and services they offer are practical and convenient; they also need to make real moms feel confident and in charge. Marketers should empower these female consumers to delegate to others (spouses, children, brands) so they can have more time to be who they want to be—at home, at work and on their own. And marketers have to use new ways to reach a population that rarely has time to sit down to read or watch or enjoy something without simultaneously doing something else.

Real moms look to subvert the so-called “mommy trap,” where a mother has to choose whether to forfeit a career to care for the kids or plow ahead at work and hand over the stroller reins to the nanny.

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THE REAL WOMAN

The American woman has come a long way since the 1960s, when second-wave feminists began charting new territory. She is no longer defined solely by her husband (as Mrs. John Doe) or her domestic role (housewife). Schools and companies alike have opened their doors to her. She works, she parents, she leads, she chooses.

Back in 1982, Rena Bartos, then senior VP at J. Walter Thompson, captured this woman, albeit in a nascent stage, in her book "The Moving Target." She called the American woman's metamorphosis a "quiet revolution" that was bound to have lasting implications for career, family, society and more. "Women have moved from defining themselves in terms of derived status," Ms. Bartos said in her book. "They are moving towards wanting a sense of personal identity beyond those private domestic roles."

Certainly since 1982 women have ventured beyond their domestic roles. They have made enormous strides when it comes to attaining high levels of education. While the same can be said of men, the positive trajectory for women has been much more pronounced. According to the most recent "Condition of Education" report published by the National Center for Education Statistics, part of the U.S. Department of Education, women earned a majority of higher-education degrees in the 2006-2007 academic year: 62.2% of associate degrees, 57.4% of bachelor's degrees, 60.6% of master's degrees and 50.1% of doctoral degrees. They are thriving in professional programs, such as medicine and law, that historically were dominated by men.

Women are also entering the work force in higher numbers than ever before, and with higher education levels, they are commanding higher salaries.

In 2008, women and girls 16 and older accounted for 46.7% of the U.S. labor force, according to the Bureau of Labor Statistics, and both parents were employed in 62% of the 24.6 million families made up of a married couple with children under 18. The increase in women in the labor force has been magnified during the recession, when the unemployment rate has been higher for men than for women, according to the Bureau of Labor Statistics.

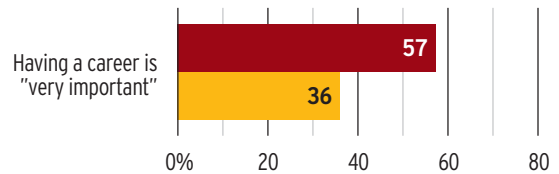
Between 1990 and 2006, women's median income grew 32.9% to \$20,014, while men's grew only 6.3% to \$32,265, according to census data from Catalyst, a non-profit organization committed to expanding business opportunities for women.

Yet another sign of women's achievement: The number of working women who regard what they do for a living as a career (rather than "just a job") has grown considerably in the past 30 years. In 1971, 29% of working women considered what they did a career, while 71% said

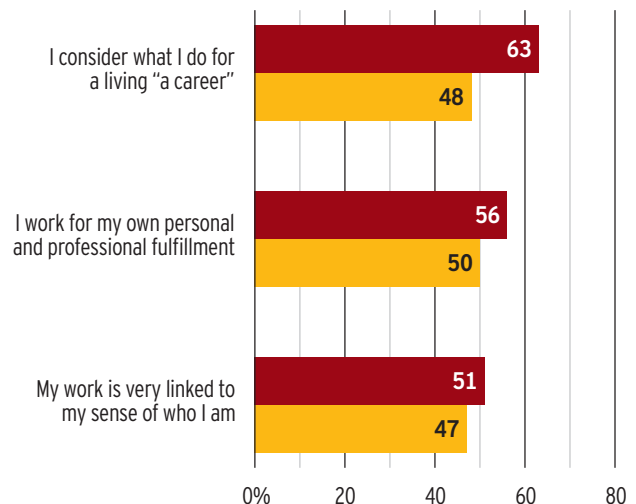
CHART 1: IMPORTANCE OF CAREER

How men and women responded to questions about work

■ MEN (N=452) ■ WOMEN (N=418)
 Please tell us how important each of the following is to you right now, at this point in your life.



■ MEN (N=277) ■ WOMEN (N=228)
 How much do you agree or disagree (among those who are employed)?



Between 1990 and 2006, women's median income grew 32.9% to \$20,014, while men's grew only 6.3% to \$32,265.

THE RISE OF THE REAL MOM

what they did was just a job, according to a Yankelovich Monitor analysis referenced in Ms. Bartos' book. By 1980 the numbers had changed: 39% of women considered what they did a career; 61% said what they did was just a job. The survey conducted for this paper found that now 48% of women consider what they do a career, while 43% said it's just a job.

But in the wake of all this social progress, there are many signs that point to stagnancy in the movement toward gender equality. Just consider the numbers of female U.S. senators (17 of 100), House members (76 of 435) and state governors (6 of 50). Or the 3% of Fortune 500 CEOs this year who are women and the 15.7% of Fortune 500 corporate-officer positions held by women in 2008, when women held 50.8% of management, professional and related occupations, according to Bureau of Labor Statistics data reported by Catalyst.

Our survey found that women today are more career-oriented than they were decades ago, but they are still less likely than men to prioritize having a career, and working women are less likely than men to consider what they do a career (see chart 1, page 4). Working women are also less likely to work for personal and professional fulfillment. (The one exception: Women 30 to 44 said work is very linked to who they are. That may be because women in that age group who are working are in the heart of their career development or have risen to middle-management positions or higher.)

While women, especially younger women, are optimistic overall about professional opportunities, on balance they are pessimistic about equal pay. Rightfully so: While women are working more, there is still enormous pay inequality. In 2008, women and girls 15 and older who worked full time, year-round received 77.1% of the median annual earnings their male counterparts did, according to the U.S. Census Bureau. (In 1960, the percentage was 60.7%.)

One year out of college, women who work full time already earn only 80% as much as their male peers earn, according to a 2007 report published by the AAUW (formerly the American Association of University Women), a nonprofit organization that promotes education and equity for women and girls. What's more, 10 years out of college, that earnings ratio drops to 69%. Therefore it's no surprise that women still feel there are barriers to overcome.

Why do these stark inequities persist in 2009? Perhaps men hold more executive positions than women, or they work longer hours, or they simply have pursued more demanding—and therefore lucrative—careers. Maybe women opt out of the work force or choose fields that don't pay as well. But according to the AAUW study, the pay

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CHART 2: PRIORITIES FOR WOMEN BY AGE

Percentage who said each of the following is "very important" at this point in their lives

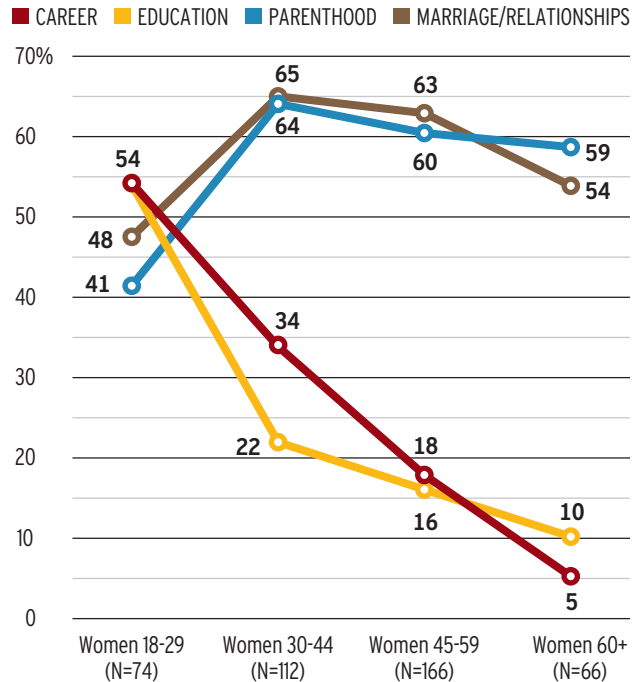
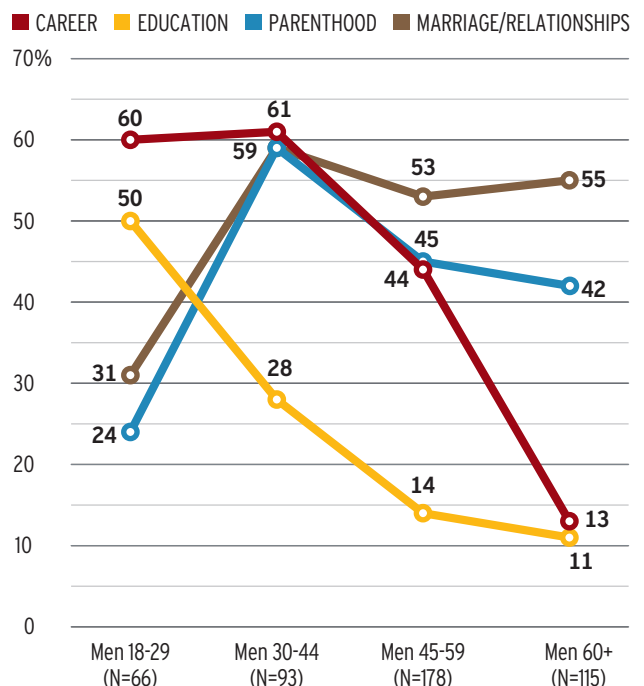


CHART 3: PRIORITIES FOR MEN BY AGE

Percentage who said each of the following is "very important" at this point in their lives



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ratio does not reach 100% even when accounting for differences in working hours, occupation, parenthood and other factors. There is still discrimination. Maybe it's not overt, but it's there.

Some may theorize that this discrimination is deeply rooted; responsibilities on the home front continue to hold women back from taking advantage of professional opportunities and fully devoting themselves to their careers. Women do not have the same career trajectory as men do, either because they opt out, prioritize family over work or take time off to have children, which can handicap them in the long run.

We found that women 30 and older, even those in the work force, tend to value marriage and parenthood over career and education (see chart 2, page 5). Even millennial women—who consider career and education more important at this point in their lives—place much more importance on being in a committed relationship, owning a home and being a parent than men their age (see chart 4).

Only men 30 to 44 prioritize parenthood as much as women (see chart 3, page 5). While women's interest in parenthood rises from the 18-to-29 age group to the 30-to-44 age group and then declines slightly as they age further, men peak at 30 to 44 and dramatically de-prioritize parenting as they age. "For men, it's like, I've done my job, I've gone to the baseball games, I've paid for your college education; now you're on your own," said Miriam Muléy, founder of the 85% Niche, a consulting firm dedicated to helping businesses grow market share among women across ethnic, racial and socioeconomic lines. "[Women] are nurturers; we are there."

One-third of survey respondents said if a parent needs to stay at home with the children, it should be the mother. And while 55% said it should be the parent who earns the lower salary, in many cases that would still mean the mother.

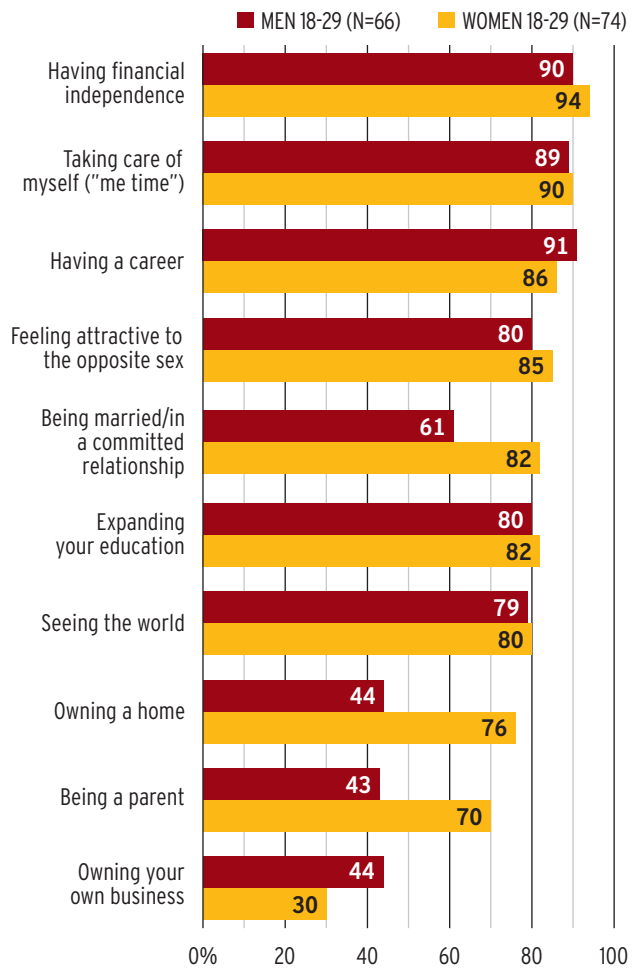
THE REAL MOM

In this paper, for lack of better descriptors and in a desire to use familiar terms that connect with readers, we refer to mothers who earn wages—more specifically, those who work full or part time, in or outside the home, on a contract or freelance basis—as "working mothers" and those who do not as "stay-at-home mothers." By using these terms we do not mean to imply that working mothers do not spend significant time at home or that stay-at-home mothers do not work in their roles. These are merely functional labels by which we can identify, group and better understand two different sets of women with children under 18.

In today's fast-paced and always-connected world, both sets of mothers parent and often run the household 24 hours a day. They are the emotional and operational cores of family life. "In the end, both working and stay-at-home moms

CHART 4: MILLENNIAL PRIORITIES

Percentage who said each of the following is "very important" at this point in their lives



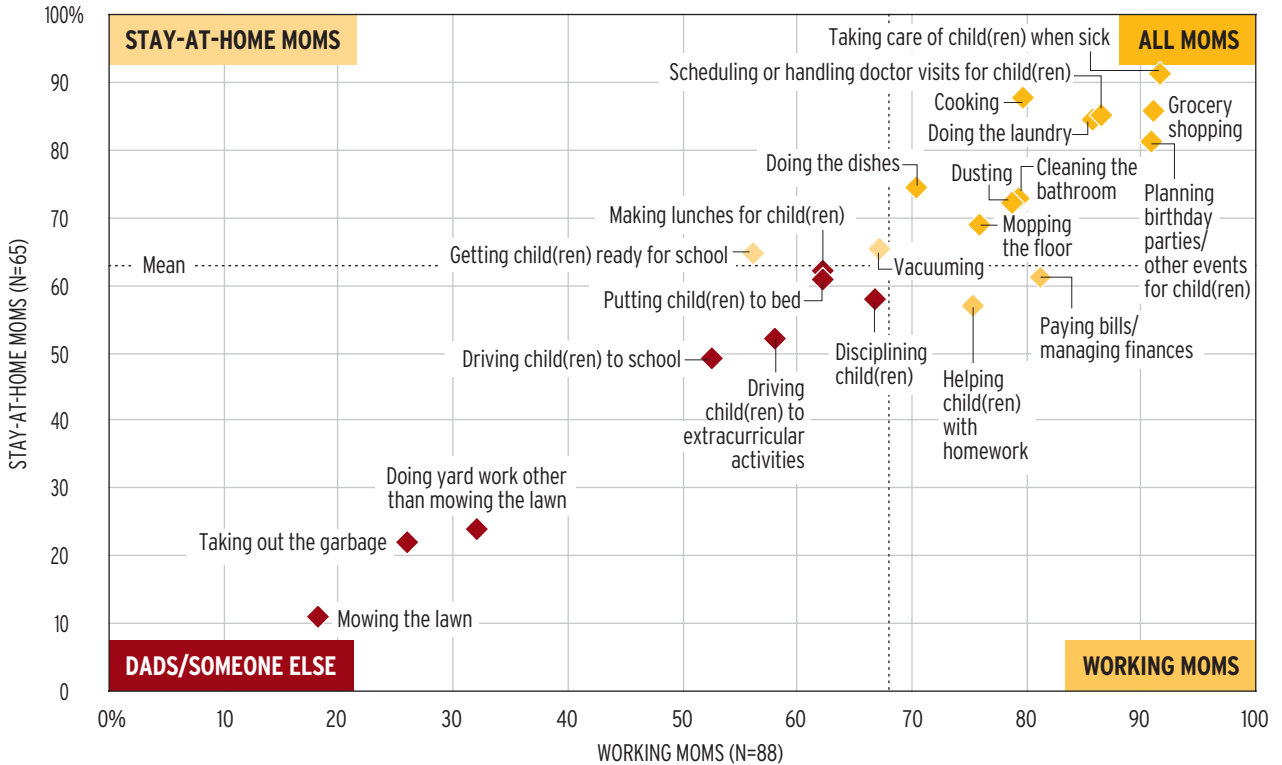
MIRIAM MULÉY

"For men, it's like, I've done my job, I've gone to the baseball games, I've paid for your college education; now you're on your own."

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CHART 5: HOUSEHOLD AND CHILD-CARE RESPONSIBILITIES

Who is primarily responsible for each task



have the pedal to the metal all the time,” said Earl Wilcox, a qualitative researcher who focuses on ethnographic work and founder of Plannerzone in Philadelphia. “There are only 24 hours, and both are more than overwhelmed with responsibilities.”

SOMUCH FOR ‘MR. MOM’

Despite the perception that “Mr. Mom” is on the rise, our research shows that traditional gender roles still exist among married and cohabiting parents. Mothers in those relationships assume the bulk of household and child-care responsibilities regardless of whether they work or not (see chart 5).

Mothers in our survey, both working and stay-at-home, tend to do “inside” or “wet” jobs such as cleaning the bathroom and doing the laundry; fathers tend to do “outside” or “dry” jobs such as mowing the lawn and taking out the garbage (see chart 6, page 8). The only shared tasks: paying bills/managing finances and grocery shopping. This traditional breakdown of household chores exists for couples who cohabit and married couples without children, too, although the second shared task is vacuuming; women tend to do the grocery shopping.

Both working and stay-at-home mothers are responsible for taking care of their children when they’re sick, planning

birthday parties and other events for their children, and handling doctor appointments for their children—much more so than their male counterparts. (Interestingly, according to our survey, men with spouses or partners who do not work are more apt to share child-care responsibilities.) While working mothers are less likely than stay-at-home mothers to help the kids get ready for school in the morning, the former are more inclined to help with homework, perhaps because they are more likely to have children who are old enough to get ready on their own (see chart 7, page 9).

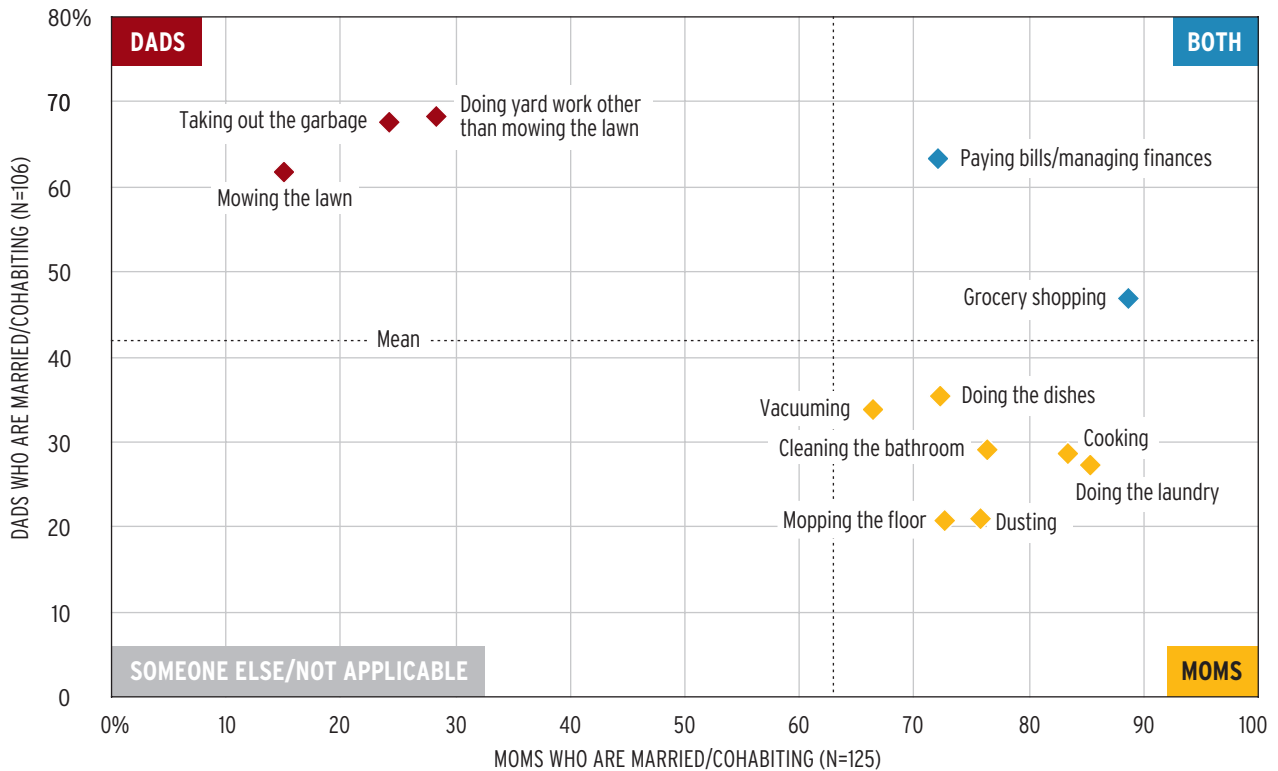
Figures from the American Time Use Survey, sponsored by the Bureau of Labor Statistics and conducted by the Census Bureau, reinforce many of our findings. Among full-time workers with children under 18, married mothers are more apt than married fathers to spend time—and more of it—doing household chores and caring for their children.

The survey, which was based on interviews with about 17,000 Americans from 2003 to 2006, revealed that on average the mothers spent almost one more hour a day doing household chores than the fathers (2.0 hours vs. 1.2 hours) and almost a half-hour more caring for their children (1.2 hours vs. 0.8 hours). The fathers, meanwhile, spent one additional hour at work per day. (It’s difficult to determine

(continued on page 8)

CHART 6: HOUSEHOLD RESPONSIBILITIES

Who is primarily responsible for each task



whether or not women would spend more time at work if they did not shoulder the bulk of the child-care and household responsibilities.)

DIFFERENT DEMOGRAPHICS

Our findings are based on self-reported data, so there could be cases where survey participants over- or underestimated their involvement in certain activities. Additionally, while our sample size has been weighted to census data across age, gender and household income, it has not been weighted across race, ethnicity or geography, and its focus skews toward those who are married. (Two-thirds of family groups with children under 18 in 2007 were headed by married couples, according to the Census Bureau.)

If anything, however, our findings likely would be more pronounced for black, Hispanic or single moms. Ms. Muléy of 85% Niche said when it comes to household and child-care responsibilities, women of color—especially those new to the U.S. who come from cultures with traditional gender roles—play a “much more confined, traditional role.”

As for single mothers, while they may receive some support, they still bear much of the burden when it comes to household and child-care responsibilities. In analyzing the

American Time Use Survey data from 2003 to 2004, two University of Maryland sociologists found that single mothers with children under 13 put in 83% to 90% of the child-rearing time their married counterparts did. “We were surprised that these women managed to pull it off so well, often working long hours with little help, yet devoting up to 90% of the time to their children that married women do,” said Sarah Kendig, the principal researcher, just before the study was published in December 2008.

Demographic differences aside, there are clear universals: With longer to-do lists than ever before, many moms find themselves time-starved, stressed and unhappy. In some ways, the second wave of feminism has wrought not only opportunities but also increased challenges, complexity and unmet expectations.

Martine Reardon, exec VP-marketing at Macy’s, said of the retailer’s 25- to 49-year-old female target: “Ten years ago she was probably at home. Now she is a working mom. She’s juggling many, many balls. She may still be home, but she’s working from home.”

On balance, working and stay-at-home mothers reported far more stress than working fathers in our survey, and working moms reported the highest levels of stress (see

THE RISE OF THE REAL MOM

CHART 7: CHILD-CARE RESPONSIBILITIES

Who is primarily responsible for each task

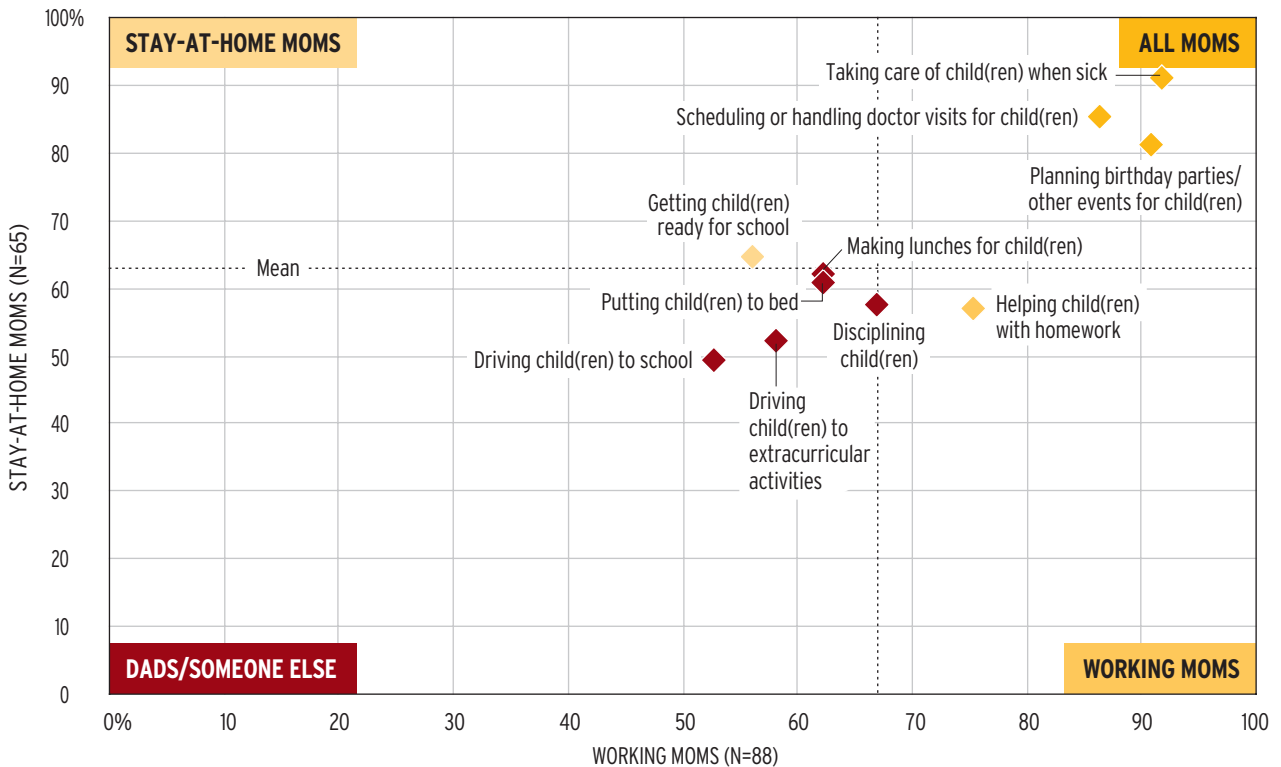


chart 8, page 10). Working mothers attribute roughly 49% of their daily stress to their professional lives and 51% to their personal lives, whereas working fathers attribute roughly 62% of their daily stress to the former and 38% to the latter.

The near-even split between work life and personal life as sources of stress for working mothers indicates that these women do not find much reprieve at home. In fact, three-quarters said they feel that they have to sacrifice personal time for a clean and organized home.

Again, these figures are likely to be even more pronounced among black, Hispanic and single moms. "Multitasking for women of color is at a much higher level than the mainstream market," Ms. Muléy said, "because more women of color are working and [have] children at home." In her 2009 book, "The 85% Niche: The Power of Women of All Colors—Latina, Black and Asian," Ms. Muléy references census data to back her claim: "Married African-American mothers with children under age 18 have higher rates of work-force participation than other married mothers—82% compared with 55% of white moms, 66% of Asian moms and 62% of Hispanic moms."

What's more, women of color tend to have more chil-

dren and have them at a younger age than non-Hispanic Caucasian women, she said. That suggests that the stress levels of women of color are "off the charts," Ms. Muléy said. She said not just home life but work life may be more stressful for women of color because "we're trying to break the glass ceiling in terms of implicit and explicit behavior directed at women of color."

For single mothers, add financial stress to the equation. Half of single-mother households in 2007 had incomes less than \$25,000, while only 8% were in the \$75,000-plus bracket, according to a report by market-research company Mintel. Just 4% of single-mom households earned \$100,000 or more in 2007 compared with a third of couples with children. And according to data from the Bureau of Labor Statistics for September 2009, women with families without a spouse present are more than one and a half times as likely as married men to be unemployed.

All this sacrifice and stress has taken a toll on today's mothers—and on women in general. Economists from the Wharton School at the University of Pennsylvania recently examined the happiness of American women and concluded that women are less happy today than they were 35

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THE RISE OF THE REAL MOM

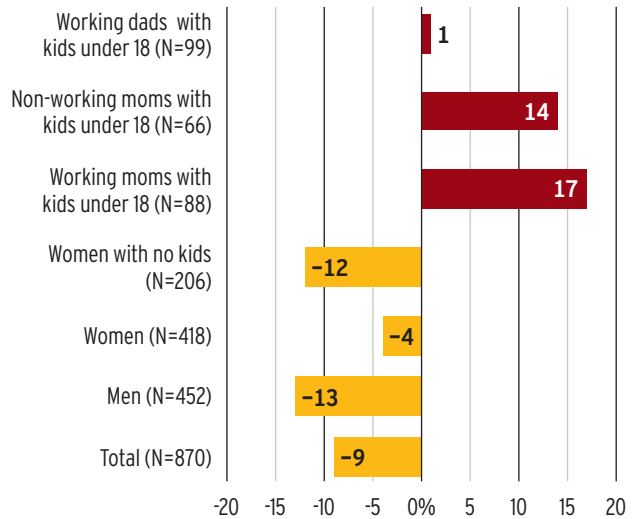
years ago, both “absolutely and relative to men.” In the 1970s that gender gap was reversed; women typically reported higher subjective well-being than men did.

In their National Bureau of Economic Research working paper, “The Paradox of Declining Female Happiness,” published in May 2009, economists Betsey Stevenson and Justin Wolfers posit that the women’s movement may, ironically, have brought about much of this unhappiness. “The increased opportunity to succeed in many dimensions may have led to an increased likelihood of believing that one’s life is not measuring up,” Ms. Stevenson and Mr. Wolfers said. “Or women may simply find the complexity and increased pressure in their modern lives to have come at the cost of happiness.”

Responding to the Wharton economists’ findings, New York Times op-ed columnist Ross Douthat said: “Feminists and traditionalists should be able to agree ... that the structures of American society don’t make enough allowances for the particular challenges of motherhood. We can squabble forever about the choices that mothers ought to make, but the difficult work-parenthood juggle is here to stay.”

CHART 8: STRESS LEVELS

Net percentage of people who reported a high level of daily stress*



*Calculated by subtracting the percentage who reported stress levels of 1 to 3 from the percentage who reported stress levels of 8 to 10 on a scale of 1 to 10, where 1 means no stress at all and 10 means extremely high stress. Source: Advertising Age and JWT survey

77 premium branded websites

12 magazine brands + 175 special interest publications

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THE RISE OF THE REAL MOM


Indeed, the juggle has been around since women first started working outside the home. Mr. Wilcox, the ethnographer, said he believes that modern life has enhanced people's individual and collective opportunities. But, he said, with those opportunities comes complexity.

"Because [a mother] is at the center of the family, she personally touches the added complexity of each member," Mr. Wilcox said in an e-mail. "Her life becomes even more complicated by each family member's opportunities/complexity." And in a world of limited resources, he said, compromises must be made for and among the family—and those compromises ultimately contribute to mothers' unhappiness.

Gina Garrubbo, exec VP at BlogHer, the women's blogging network, put that concept in more accessible terms: "Women love opportunity," she said in a roundtable discussion we hosted at JWT's New York offices in July. "And so you start to expand yourself into all the possibilities, which is both wonderful and horrible, because it's not clear-cut." There is no right or wrong choice—and yet every choice has its opportunity cost.

(continued on page 12)

"Women love opportunity. And so you start to expand yourself into all the possibilities, which is both wonderful and horrible."



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THE NEW PRAGMATISM

What's different today is that women—millennials in particular—are becoming more accepting of those opportunity costs. With the publication of books such as “Good-Enough Mother,” “Even June Cleaver Would Forget the Juice Box,” “The Mommy Myth” and “Perfect Madness,” the second half of this decade has brought a backlash against the mythical Supermom—that hyperactive Type-A personality who whips up perfect cookies and perfect children—and an embrace of the likable, more relatable real mom, who doesn't obsess over the little things. Spilled milk? No problem.

As we near the next decade, this shift from striving for perfection to settling for pragmatism promises to continue for women—especially as more millennials become mothers—and the philosophy is expanding to areas beyond parenting. We asked our survey participants whether they believe that “having it all” when it comes to family and career is subjective, and nearly two-thirds of women said they do. Nearly half of women we surveyed said finding balance between family and career is “a joke” for working women. Today's women understand that life is a series of tradeoffs both big and small: Having a job means less free time to spend with children but more income and autonomy; getting takeout for dinner means less control over ingredients but more convenience.

Increasingly, women are showing signs that they are not aspiring to perfection in any arena of their lives. “There is no such thing as being perfect,” said Aliza Freud, founder and CEO of SheSpeaks, a New York-based word-of-mouth network for women. “Women realize that there's no such thing as being good at everything, so they're going to focus on doing well in the moment that they're in. If I'm working, then I'm working. If I'm with my kids, then I'm with my kids.”

Ms. Freud said she believes that a great deal of this sea change has come from millennial women. Through research in her community of women, Ms. Freud has found that millennials are less conflicted than, for example, Generation X. “Gen Xers were raised at a time where their parents might have instilled in them that they can do anything they want to do,” Ms. Freud said. Oftentimes that meant being either the perfect career woman or the perfect mom or both at the same time. Now those women are conflicted about the choices they have made. If they chose to stay at home, they think about what they gave up at work, and if they pursued a career, they think about what they are missing at home. “[Millennials] grew up with seeing a lot of moms working, being outside the home a lot, and decided, ‘Hey, this isn't what I want,’” Ms. Freud said. “So they may be at peace more with their not working or working.”

Gloria Feldt, an activist, author, and former CEO and



ALIZA FREUD

“Women realize that there's no such thing as being good at everything, so they're going to focus on doing well in the moment that they're in.”



NOBODY'S PERFECT: A number of parenting books in the past five years have rejected the concept of an ideal mother.



GLORIA FELDT

“She has witnessed her parents having, in theory, gender equality. But actually her mother was hustling and doing two jobs.”

president of Planned Parenthood, put this millennial phenomenon into context: “She has witnessed her parents having, in theory, gender equality. But actually her mother was hustling and doing two jobs.” And trying to succeed at both.

Laura Vanderkam, a Manhattan-based journalist and author of the forthcoming book “168 Hours,” has analyzed how Americans spend a week (i.e., 168 hours) and identified ways in which they can do so more efficiently. She has found that pragmatism is growing among a certain set of mothers, women she refers to as “core-competency moms.”

Rather than skimp on time with their children—amid all their responsibilities, 45% of working mothers indicated to us that they don’t get enough time to spend with their children—these moms are going to cut themselves slack in non-core-competency areas, Ms. Vanderkam said. “If something has to go,” she said at the July roundtable, “it’s going to be the housework. It’s going to be the errands. It’s going to be the ‘me’ time. It’s going to be a little bit of sleep. It’s going to be television.”

Ms. Vanderkam has carefully studied the American Time Use Survey, which found that married mothers who worked full time spent, on average, less time on household chores (2 hours vs. 3.6 hours), leisure activities such as socializing or exercising (2.9 hours vs. 4.2 hours) and sleeping (8.18 hours vs. 8.77 hours) than their stay-at-home counterparts did. However, the time they spent interacting with their children did not vary as much: Working mothers spent an average of 0.04 hours reading to or with their children and 0.19 playing or doing hobbies with them, compared with 0.09 hours reading and 0.52 hours playing for stay-at-home mothers.

Catalyst refers to this as “work-life effectiveness,” as opposed to work-life balance. The view at the nonprofit is that the word balance inherently connotes accommodation between work and life, whereas what is really needed is organization. “Balance means different things at different times of the day, at different times in your life,” said Jan Combopiano, VP-chief knowledge officer at Catalyst. “It’s hard to use that term.” The idea behind work-life effectiveness, she said, “is that you as an individual have choices about what you have to do now.” And perhaps most importantly, what you choose to do is “not a one-size-fits-all.”

This movement toward work-life effectiveness recognizes that women’s lives are multidimensional. Nuance can come from all corners, whether it’s a woman’s upbringing, stage in life or socioeconomic status, among other things. Many of the experts interviewed for this paper stressed that point. “Moms are a pretty broad bucket,” said SheSpeaks founder Ms. Freud. “It’s about how a woman defines herself at any given moment in time.”

(continued on page 14)

Meet a mom

We asked video-based community ExpoTV to help us understand how moms shop for groceries. We received video entries from women all across the country who let us peek into their grocery bags—and their lives.



ANGELA

Dayton, Ohio

Age: 29

Relationship status: Married

Children: 2-year-old

Employment: Works full-time as a budget analyst

Angela is an efficient shopper, and the designated shopper for her family. At the end of the workday, she values a good deal for her money and time. She shops weekly or biweekly, mostly for items she knows her family needs.

While she does buy some branded items, she’s not particularly brand loyal. “I buy the Walmart-brand fruit. They come in the nice, little, convenient containers,” she said. “I buy Walmart because it’s cheaper and I think it tastes just as good as the regular brand name.”



LAURA VANDERKAM

“If something has to go, it’s going to be the housework. It’s going to be the errands. It’s going to be the ‘me’ time. It’s going to be a little bit of sleep.”

Ms. Freud and some others said the way mothers define themselves is directly correlated to the dependency of children on them. "When she has young children, because those children have such needs, her primary definition of herself is Mom," Ms. Freud said. "But as her children grow and become less dependent, it's not just about being Mom."

Real moms want to be embraced for all of who they are. "Smart businesses recognize that cookie-cutter approaches don't work," Ms. Combopiano said.

Ms. Garrubbo said she has witnessed similar sentiment in the BlogHer community. "There's this sort of backlash and anger that women have to marketers," she said. "What they're saying: 'Don't tell us what we think; don't tell us who we are.'"

WHAT REAL MOMS WANT

Real moms come to the table with different life experiences, attitudes and demographics, and they want marketers to understand and embrace those differences. The real mom wants products and services that not only reflect her unique reality but also help make it better. She is looking for solutions that will help her manage the complexities of her life, lessen her stress and workload, and give her more time to focus on what's really important. She wants to be a good mom and COO of the household but also have an identity outside that. And while she may be embracing her perfectly imperfect self—as a mother and beyond—she wants brands to catch up. In plainer terms, she wants products and services that provide value to her and her family—and that give her permission to be imperfect and recognize her identity outside of being a mom.

EVERY DOLLAR COUNTS

Money has always been a source of stress for families, and the current economic climate has only heightened that stress. So it comes as no surprise that, as the COO of the family, today's mom is trying to manage that stress by playing the price and value game.

In the qualitative research Ad Age and JWT did with ExpoTV, we asked women to share with us on film their most recent grocery-store purchases. They repeatedly said they had bought certain products based on sales, coupons or store circulars. Often they bought generic products because they were cheaper and/or "just as good" as the branded versions. "I bought the Walmart-brand product because it was the cheapest one and I think that their stuff tastes just as good as the name brand," said Angela, a full-time working mother from Ohio, referring to her most recent shopping trip.

Others said they had waited for sales to stock up on items they needed, such as laundry detergent and toilet

Meet a mom



JANE

Tampa, Fla.

Age: 34

Relationship status: Married

Children: 2-year-old and 4-year-old

Employment: Stays at home

Jane shops for groceries every Wednesday night with her husband and two children. The family makes an outing of it, getting dinner at McDonald's along the way.

She selects what to buy based on her grocery store's circular. She considers price before convenience, buying whatever is on sale, especially if it's "buy one, get one free." "That's pretty much how we shop is the buy-one-get-one sales," she said.

"There's this sort of backlash and anger that women have to marketers. What they're saying: 'Don't tell us what we think; don't tell us who we are.'"

paper. "I buy it in bulk, I buy it on sale, I comparison shop," said Jocelyn, a small-business owner from North Carolina. Danielle, a married mother of two and high-school science teacher from New Jersey, said she shops using grocery-store circulars and maximizes her store's "bonus bucks" system.

Ms. Reardon said she has seen similar patterns at Macy's. "[Mom] is definitely still looking for style, but she also wants value," she said. "And value doesn't necessarily mean price." Both Ms. Reardon and Kathy O'Brien, U.S. marketing director for Unilever's Dove, emphasized that product quality plays a role too. "Moms have just become more and more savvy," Ms. O'Brien said. "They weigh price with the benefits of products."

That's something women said in our research with ExpoTV as well in explaining why they bought branded items with coupons or in bulk, or purchased their produce at one store and their dry goods at another. Right now, amid the recession, price is especially important. And this behavior has expanded to income brackets that never before would have considered such savings methods, said Mr. Wilcox, who collaborates with ExpoTV on its ethnographic practice.

As Betsy O'Rourke, senior VP-marketing at Royal Caribbean International, put it: Today, for everybody, "cheap is chic." The cruise-line brand is highlighting budget-friendly family vacations to resonate with Mom.

FAMILY COMES FIRST

"We're all time-deprived," Ms. O'Rourke said. "We live in a society where we are very busy people, whether we're working moms or non-working moms." A vacation can be one of the rare occasions when the entire family gets together for a long and uninterrupted period of time, she said. "From a mom point of view, that responsibility to create a family connection is even more important. There's a lot riding on it."

Ms. O'Rourke said Royal Caribbean tries to partner with moms on convenience, rather than pander to their every whim and fancy. "We want to make it easy for you to have a great time, and on your budget that's available," she said.

Royal Caribbean aims to provide a "hassle-free" product—appealing to time-crunched moms. Ms. O'Rourke said the company knows that a mother wants to feel taken care of once on board. "We want to make sure that you're the hero, that when your family comes on our ship, it's going to be a great experience for all of them," she said. "And that you, mom, who has done all the planning and scheduling, get to enjoy that vacation." Ms. O'Rourke said the goal is to empower moms to relax: "Give me permission to do things that I don't oth-

(continued on page 16)

Meet a mom



HEATHER

Vicksburg, Mich.

Age: 35

Relationship status: Married

Children: 3-year-old and 6-year-old

Employment: Stays at home but sells embroidered goods on Etsy.com

Heather dislikes grocery shopping, so she prefers to shop every three or four weeks. She is the primary shopper. She plans for all of the meals, so she makes food purchases based on her family's needs. Heather shops in two different stores: one local store for produce and Walmart for everything else because of its low prices.

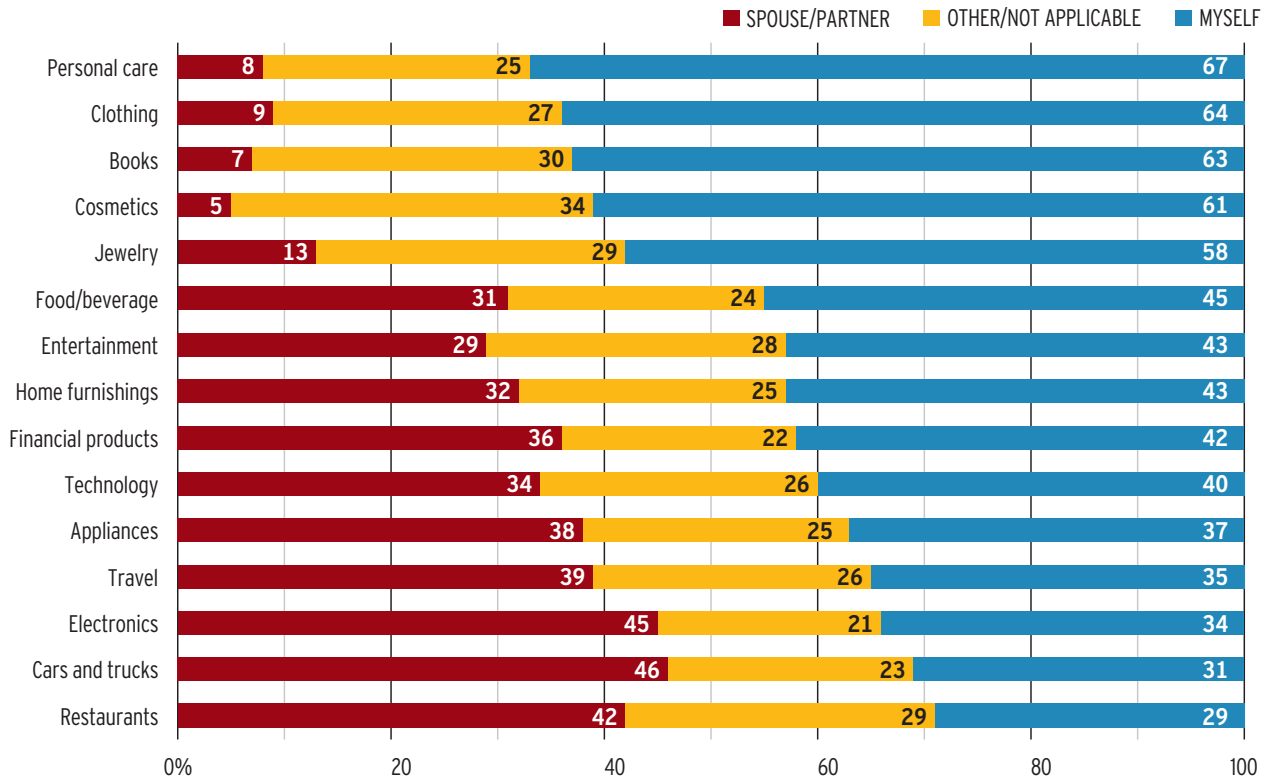
When she shops, she's armed with coupons, seeking to get the best deals. She is not brand loyal. "Just got the store brand because it was the cheapest," she said. "It all tastes pretty much the same."

On grocery-shopping nights, she picks up convenient items for dinner that don't require her to cook. When we met Heather, she had picked up rotisserie chicken for her family for \$4.48.

"Moms have just become more and more savvy. They weigh price with the benefits of products."

CHART 9: PURCHASING INFLUENCES

Who women said has the most influence on what they buy (N=418)



erwise get the chance to do.”

Increasingly, taking care of the family means providing more-holistic, healthful food. “You’re seeing a strong consumer trend towards healthy food,” said Hy Nguyen, brand manager at Unilever’s Skippy peanut-butter brand. “Basically, there’s nothing more important to mom than taking care of her kids and nurturing her kids.”

Skippy was the first national brand to introduce no-need-to-stir natural peanut butter, something it sensed would be in increasing demand. Indeed, sales of Skippy Natural were up 145% to \$20.1 million in the 52 weeks ended Sept. 6, according to Information Resources, Inc., the Chicago-based market-research firm. And mothers are the primary shoppers for Skippy. “Moms are constantly trying to find things that their kids are going to eat,” Mr. Nguyen said, and they want items that are good for their kids too.

That was evident among the women in our research with ExpoTV. Women across the country went out of their way to buy products they knew—or thought—were healthy. “We are trying to eat more healthy,” said Angie from North Carolina, a married stay-at-home mother of three, explaining why she had bought Newman’s Own

salad dressings. She said she tends to buy healthful items she reads about in magazines or hears about from friends, such as green tea and blueberries.

Carol Anne from Minnesota, a married stay-at-home mother of two, buys a lot of fruit, yogurt and eggs for her family. “They are healthy,” she said, again and again. A number of other women said they had bought 100-calorie packs, whole-wheat bread and so on “because they were healthy.”

PERMISSION TO BE IMPERFECT

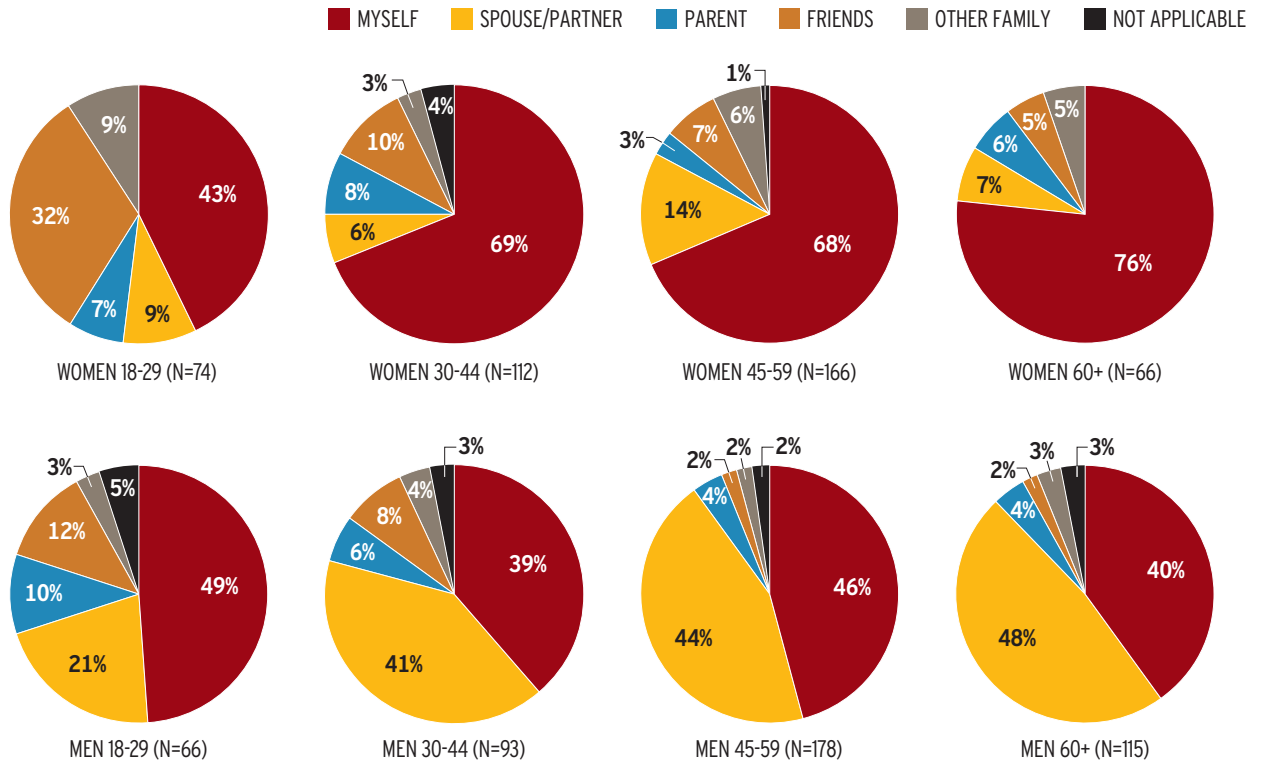
As the movement toward pragmatism continues, real moms will come to embrace brands that give them permission to be imperfect without feeling guilty. That could mean a number of things for marketers, but chief among them is providing women the tools to let go of the inclination to do it all and simply delegate some of those non-core-competency responsibilities—whether it’s to a spouse, a child or a brand.

In a series on core-competency moms for the Huffington Post, Ms. Vanderkam talks about delegating the dishes to Dixie. “Dixie disposable dishes can be tossed after meals, eliminating the need to rinse plates, stick them in the dishwasher or scrub them by hand,”

THE RISE OF THE REAL MOM

CHART 10: CLOTHING PURCHASES

Who has the most influence



Ms. Vanderkam writes, describing a TV ad she saw for the brand. “The less time the TV mom has to spend washing dishes, she reports, the more time she can spend with her kids.” The ad gives moms permission to ditch doing the dishes to achieve a higher good: spending quality time with their children.

A recent TV spot from Best Buy does not empower moms in that way. In “Annie,” a frumpy-looking mother stands on a football field before a packed stadium of Best Buy employees, looking to buy the best computer for her teenage daughter. “I don’t know anything about computers,” she begins. “And my daughter is going to college so she needs one. Can you help me?” The Best Buy crew begins to shout out advice. “I don’t want to get her something that she thinks is totally lame,” the mom adds.

Lame? How about the fact that this poor mother, with bags under her eyes, is alone shopping for her adult daughter—and the expectation is that that’s a good thing? While the spot does portray the mother as imperfect, it would have been better to give her permission to bow out of this responsibility, leaving the decision up to the more-tech-savvy daughter. Best Buy declined to comment on the ad.

MORE THAN JUST A MOM

Dove’s core consumer is in her 30s and often married with children, Ms. O’Brien said, and now more than ever she wants to be communicated with in totality—not as somebody’s mom. Ms. O’Brien said today’s mothers are incorporating more of their single lives into their post-children lives. “They still see themselves as individuals, and they don’t want to be seen as Mom,” she said, clarifying: “They want that to be part of their persona, not all of who they are.”

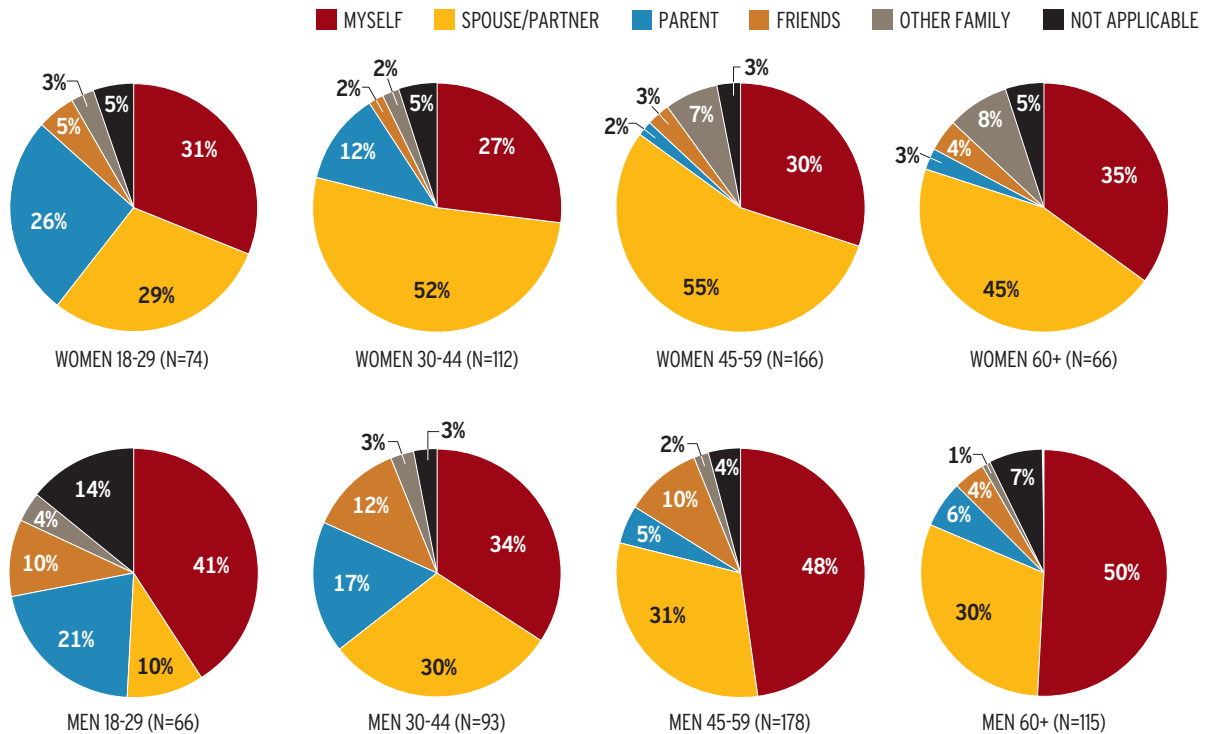
Frito-Lay has started thinking along those lines as well. It created its women’s portfolio last year after discovering that women were doing the bulk of the shopping for salty snacks for their families but were not buying many salty snacks for themselves—despite their high levels of stress and the depressing impact of the recession, which one might think would make them more apt to snack. As part of its initiative, Frito-Lay came up with “permissible indulgences”—products that could bring a woman satisfaction without any accompanying guilt.

“She recognizes the need to take time for herself to be a better wife, friend, spouse, mother, worker,” said Marissa Jarratt, brand manager for the women’s portfolio. “What

(continued on page 18)

CHART 11: AUTO PURCHASES

Who has the most influence



we're trying to do is be a part of her life in those moments."

The women's portfolio includes the Baked products, 100-calorie packs of other Frito-Lay products and recently launched SmartFood, a hybrid sweet and salty popcorn snack with ingredients such as added calcium and fiber. The products are lower in fat and calories than sibling products such as regular Doritos and Cheetos and packaged in more-subdued matte colors. "She's looking for a product to start a conversation with her, not yelling at her," Ms. Jarratt said. "Our other products were screaming out like a teenage boy."

Frito-Lay provided women with equivalent bite-size "permissible indulgences" in the entertainment realm by also building a website with short, animated webisodes, at awomansworld.com.

HOW REAL MOMS SHOP

Women may be the primary shoppers, but according to a 2009 report by Catalyst, women's buying power is difficult to measure. While experts such as Ms. Muléy of the 85% Niche assert that women make 85% of all purchasing decisions (hence the name of her company), Catalyst noted that backing that number with census data is difficult, if not

impossible. Census data are reported by household unit, not individual, so spending by the 50% of women who are married householders is grouped with their households' overall spending.

"The key point about women's buying power is that women have income," said Catalyst's Ms. Combopiano. "Women spend [on] more than just clothing and food. They spend money on cars, consumer electronics [and] big-ticket items" (see chart 9, page 16).

Boston Consulting Group, which conducted a multi-country study of women in 2008, estimates that women control \$4.3 trillion of the \$5.9 trillion in U.S. consumer spending, or 73% of household spending. Yet, in SheSpeaks research, 90% of women say advertisers don't advertise to them, Ms. Freud said.

Today's time-pressed mom is a more focused shopper than her predecessors. "She only has a couple of minutes where she's running in, so she's trying to get everything that she needs," Skippy's Mr. Nguyen said. Frito-Lay has acknowledged that tendency by placing the products in its women's portfolio at the ends of grocery-store aisles, so a busy mom can find them quickly and easily.

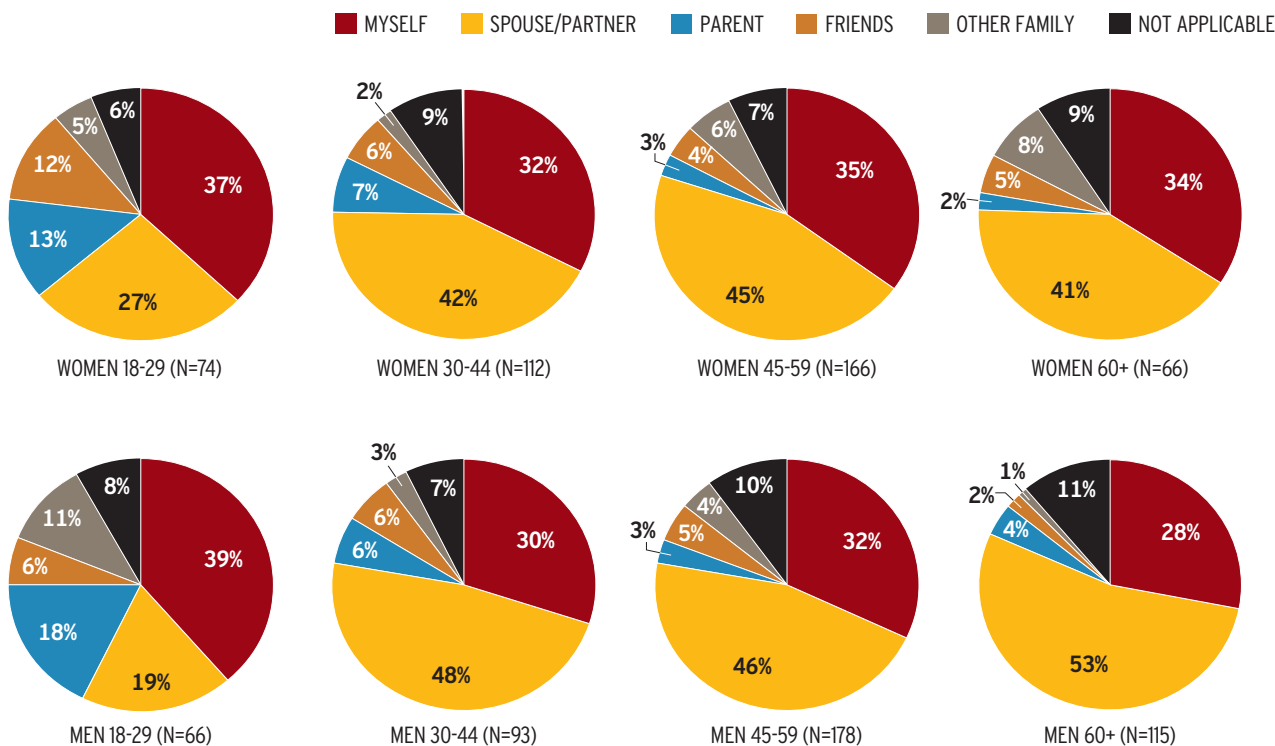
"She doesn't have the time she had before. What she wants is an easy experience, and she wants us to be more accommodating," said Macy's Ms. Reardon, adding that

Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey

THE RISE OF THE REAL MOM

CHART 12: TRAVEL PURCHASES

Who has the most influence



women are shopping closer to the time when they need clothing, instead of planning months or seasons in advance, as they did a few years ago. Not surprisingly, they are turning to the internet to make purchases. In the free moments after they put the kids to bed, for example, they'll hop online and visit highly targeted female and/or social-networking websites to check out the latest trends or deals.

Women are still the primary shoppers for their families at Macy's, Ms. Reardon said, though men are beginning to do some of the shopping for themselves. Our survey found that men over 30 still tend to consult their spouses or partners for clothing advice (see chart 10, page 17).

When it comes to big-ticket items such as cars and trucks, we found that many women over 30 rely on their spouse or partner to make a decision (see chart 11, page 18). But men also consult their spouse or partner. The car purchase is an increasingly collaborative, family-oriented process, said Sheryl Connelly, global trends and futuring manager at Ford.

For the past five years, Ms. Connelly has been responsible for identifying and tracking non-automotive trends that might affect the way people purchase and use vehicles. "We talk a lot about the influence children have on household decision-making purchases," she said, adding that parents dote more on their children than ever before. "There's

also a changing definition of family. Who is driving the car? It's not necessarily Mom buying the car or Dad buying the car; it's the family buying a fleet." A family might want one small car for shorter distances or the work commute and a large one for carpool and vacations.

MORE SELF-RELIANT

While Ms. O'Rourke at Royal Caribbean estimated that 80% of all trips are planned and booked by women, ultimately travel is a joint decision. "What we surmise is that she spends the time, she gathers the information," Ms. O'Rourke said. "Then she shares the information with her partner, and then they make the joint decision." Our findings confirm that (see chart 12). Illustrating the complications of measuring female buying power, Ms. O'Rourke added: "Who actually puts the credit card down, I don't know."

Interestingly, our data show that as women age, they become more self-reliant for certain purchases, especially entertainment, personal care, clothing, appliances, home furnishings and food/beverage items (see appendix, page 23). Lauren Zalaznick, president of NBC Universal's women and lifestyle entertainment networks, said that does not surprise her. "Women get more comfortable over

(continued on page 20)

the course of their lifetime making decisions," she said, adding with a laugh, "as they get older, more confident or more satisfied or more bored."

WHAT GETS REAL MOMS' ATTENTION

It's not enough to understand that women are the principal shoppers, that women have the "power of the purse," Ms. Zalaznick said. "It's that [marketers] need customized ways of reaching these women."

"It [used to be] a lot easier to understand [women] and speak to them all at once," said Tony Cardinale, senior VP-research and strategic insights for Bravo, Oxygen and Women@NBCU. "What we have now are silos with different outlooks, different psychographics."

The multitasking tendencies of today's moms extend to their media consumption, and as a result it's getting close to impossible to grab their truly undivided attention. As more millennials—digital natives and multitasking machines that they are—become mothers, that attention

deficit will only grow.

Content creators, understanding that these women do more than one thing at a time, are turning what could be a negative (a distraction) into a positive (an immersive experience). By layering a multitude of media into entertainment, they are creating content designed for simultaneous consumption and engagement. Mr. Cardinale said Bravo, for example, actually encourages viewers to multitask while watching shows—that is, to text, e-mail or read blogs about Bravo content or play around on the network's website. "We'd rather have them looking at [our] screen than making a sandwich," he said.

Mr. Cardinale said while these developments are exciting for him as a researcher, they can be challenging for a marketer. "It's especially different with younger women," he said. "You sort of have to wrangle them in small groups together if you have a message for them."

With mothers—both those who work and those who stay at home—a chief task is to present them with relevant content that fits into their lives. "The truism is that it doesn't matter if they're coming home at 7:05 p.m. or starting

social media + mobile + database + hispanic + healthcare marketing

custom publishing + web design and development

Meredith is a leading provider of integrated marketing programs delivering compelling content across traditional and new media channels. We leverage our award-winning expertise in word-of-mouth, online and direct marketing to build deep, meaningful connections with consumers. **Let Meredith help you strengthen and nourish your relationships with women in ways you've never imagined.**

THE RISE OF THE REAL MOM

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to cook dinner at 5:45 p.m.," said Ms. Zalaznick of NBCU's women and lifestyle entertainment networks. "Their minds say, 'Please don't waste my time; please respect me.'" For NBCU, part of being respectful and relevant is creating network programming that is relatable and entertaining and part of it is embracing viewers' lifestyles.

Ms. Zalaznick spearheaded the launch of Women@NBCU last summer to enable advertisers to reach women across a number of NBC Universal properties. Since then the company has done multimillion-dollar deals with Walmart, Kodak and General Mills and secured a cross-network deal with American Express. Women@NBCU claims to reach 95% of American women through the Oxygen, Bravo and iVillage properties, as well as NBC's "Today" and shows like it.

Each property has its own target psychographic. Mr. Cardinale said Bravo, for example, appeals to "upscale, cosmopolitan" women in their 30s and 40s with successful careers who "like watching people with concerns in their lives that are similar to theirs." Oxygen, by contrast, goes for the 20- or 30-something woman who is closely con-

nected with her friends and "whose life is about fun." "The difference between Oxygen and Bravo is less about what I see on paper when I see their age but more about life stage, values and mindset," he said.

Increasingly, real moms are augmenting their media diets with content from their peers. Whether it's in person or on blogs and sites such as Facebook and Twitter, moms are big on communicating with other moms—not just about parenthood but about politics, literature, health and more. Women in the BlogHer community are educated and tech-savvy, and many of them are taking time away from the work force to raise young children. "They want to be heard, they want to be acknowledged," Ms. Garrubbo said. "The one thing women say is, 'I get to be all of who I am at this group. I don't have to just be a wife, I don't have to just be the mom.'"

For Macy's, it's about bringing content to women where they are spending time. Online, that means reaching out on women's websites and social-networking sites; offline, it's about hosting the Macy's Thanksgiving Day

(continued on page 22)



direct ways to connect with alex

meredith integrated marketing

Parade or Glamorama, the store's fashion-show fundraiser. Through these channels women can spend time with their family and friends and connect with the brand. Ms. Reardon said cause-related marketing has been a particularly successful initiative for Macy's, which works with the American Heart Association and Feeding America, among other charities.

Women are "very likely to be loyal to companies that do good work," said Connie Fontaine, manager of brand content and alliances at Ford, citing research from cause-related-marketing agency Cone. According to the 2008 Cone Cause Evolution Study, 85% of Americans have a more positive image of a product or company when it supports a cause they care about, and 79% said they would be likely to switch from one brand to an equivalent brand if it was associated with a good cause.

Ford has been a national sponsor of the Susan G. Komen Race for the Cure for the past 15 years and helped raise more than \$100 million for the breast-cancer organization to date. At first Ford's involvement was not connected to the car company's marketing efforts. "But then we found that consumers were expecting it," Ms. Fontaine said. "It's become something over the past few years that we have integrated the product story into our marketing." Today, the so-called "Warriors in Pink" program has particularly resonated with women, in branded entertainment on Lifetime's "Army Wives" and online, where women can contribute to a virtual quilt.

Meanwhile, Dove continues to see women respond positively to its "Campaign for Real Beauty." Dove kicked off the campaign in 2004, catalyzing a national conversation around what it means to be beautiful as a woman. The concept: Real beauty comes in all shapes, sizes and colors. While the campaign has grown beyond its social message—the advertising now incorporates much more information about the science behind the product—the brand continues to focus on building self-esteem, for girls and young women in particular. Now in

its third wave, the Dove campaign works to give mothers tools to spread the self-esteem message. Not only has Dove's Ms. O'Brien seen women respond positively to the "Campaign for Real Beauty," she said, she has also seen women wanting to become a part of it. Why? It's part of their reality.

"A lot of people say they listen to women," said NBCU's Ms. Zalaznick. "Very few people actually do." One thing is clear, she said: "What's important is don't try to move your [customer] segment to places they don't want to go. Don't say that 'Now that half of you are graduating from [Harvard Business School], we're going to market to you like a man.'" Nor should companies market to women as if they were June Cleaver, just because they bear the majority of household and child-care responsibilities.

Back in 1982, JWT's Ms. Bartos predicted that women's social progress—and quest for identity—would be a "never ending saga." She closed her book with a few telling lines from Gretchen Cryer, a singer of the era:

"Twice I was a mother,
Once I was a wife,
Tore off the labels,
Now all that's left is life."

It's that leftover "life" that marketers—and women themselves—are still figuring out today.

Catalyst's Ms. Combopiano said she is optimistic that traditional gender roles will change within a generation, as men assume more responsibilities at home.

"I think the women's movement has changed men as profoundly as it has changed women," BlogHer's Ms. Garrubbo said. "They, too, want balance. . . . They want, when they have children, to be able to engage with them. They want to be able to take off if they need to for a kid's illness or something like that."

Until then, it's all about the real mom.

THE RISE OF THE REAL MOM

APPENDIX

CHART 13: ENTERTAINMENT PURCHASES

Who has the most influence

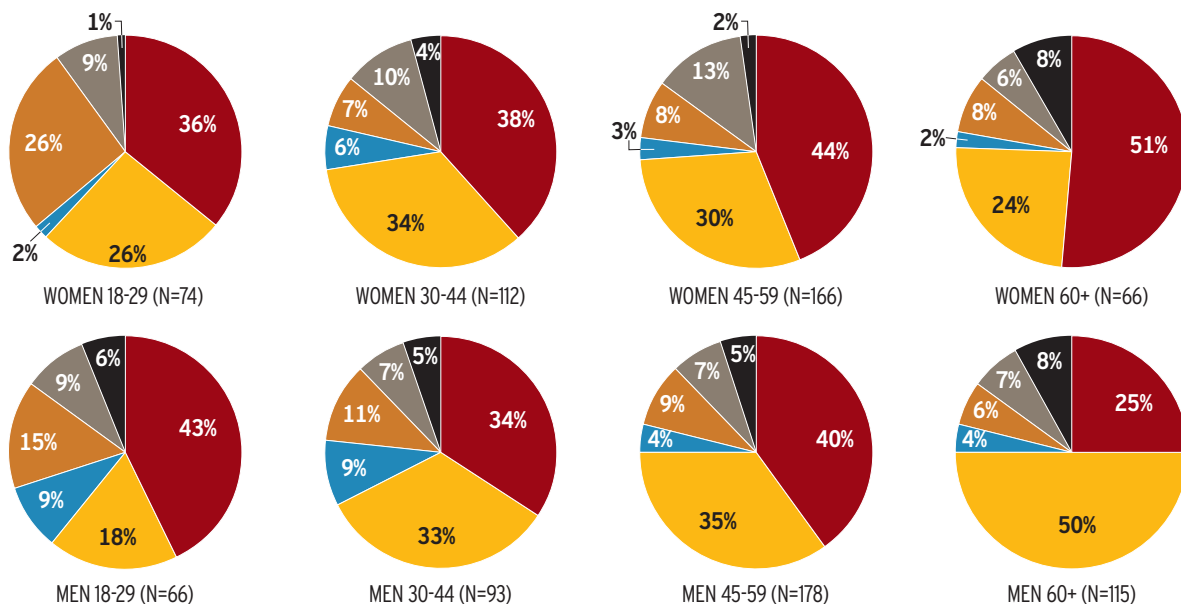
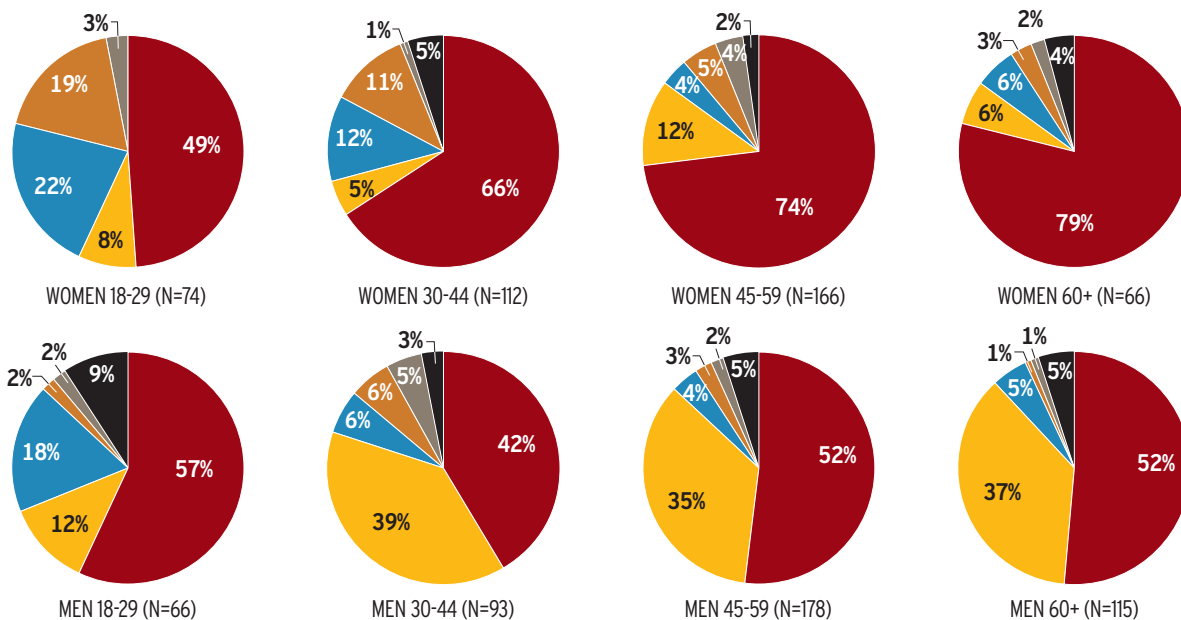


CHART 14: PERSONAL-CARE PURCHASES

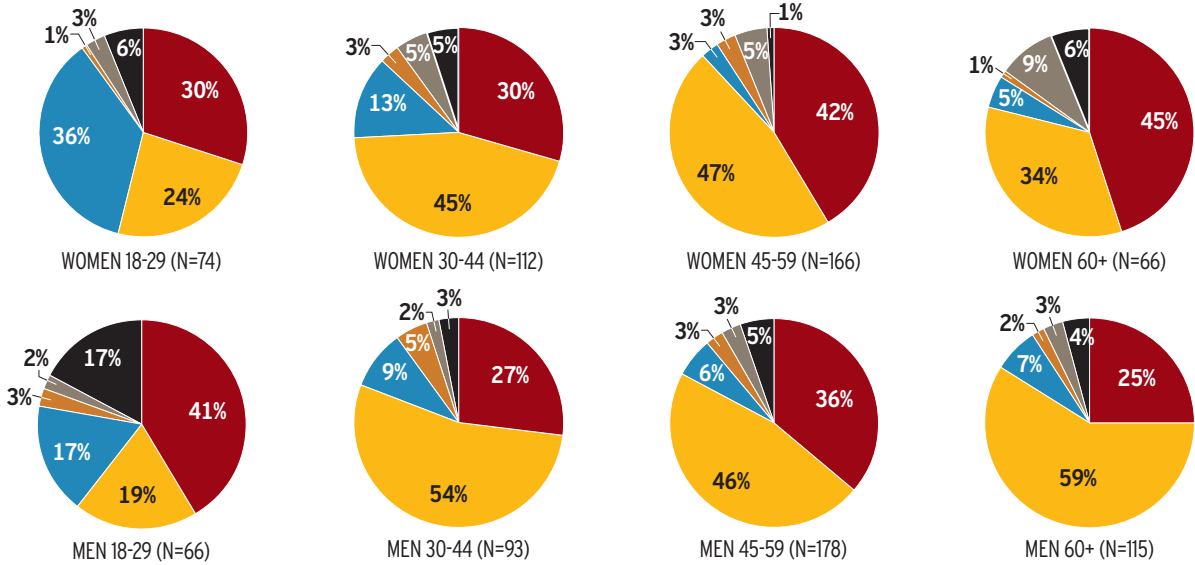
Who has the most influence



Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey

CHART 15: APPLIANCE PURCHASES

Who has the most influence ■ MYSELF ■ SPOUSE/PARTNER ■ PARENT ■ FRIENDS ■ OTHER FAMILY ■ NOT APPLICABLE



Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey



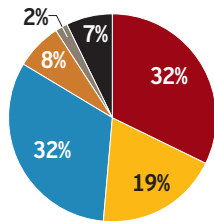
Meredith knows women. Whether sampling new products at one of our 50+ annual events, watching an original webisode, or redeeming an offer at a local retailer, we motivate women to take action. **Let Meredith help you engage consumers with custom programs that deliver measurable results.**

THE RISE OF THE REAL MOM

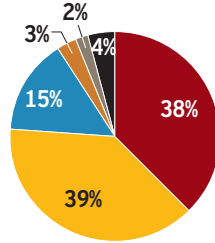
CHART 16: HOME-FURNISHING PURCHASES

Who has the most influence

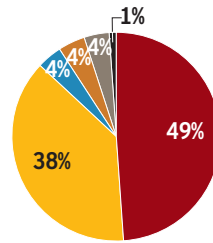
■ MYSELF
 ■ SPOUSE/PARTNER
 ■ PARENT
 ■ FRIENDS
 ■ OTHER FAMILY
 ■ NOT APPLICABLE



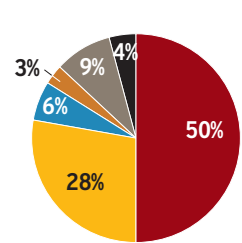
WOMEN 18-29 (N=74)



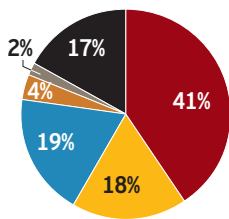
WOMEN 30-44 (N=112)



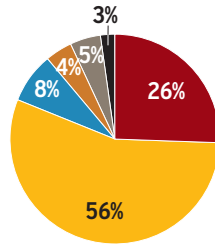
WOMEN 45-59 (N=166)



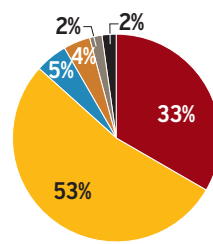
WOMEN 60+ (N=66)



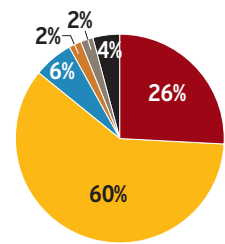
MEN 18-29 (N=66)



MEN 30-44 (N=93)



MEN 45-59 (N=178)



MEN 60+ (N=115)

Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey



engaging ways to connect with lani

video production and distribution + creative and print services

retail promotions + experiential marketing

research + consumer insights

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CHART 17: FOOD/BEVERAGE PURCHASES

Who has the most influence

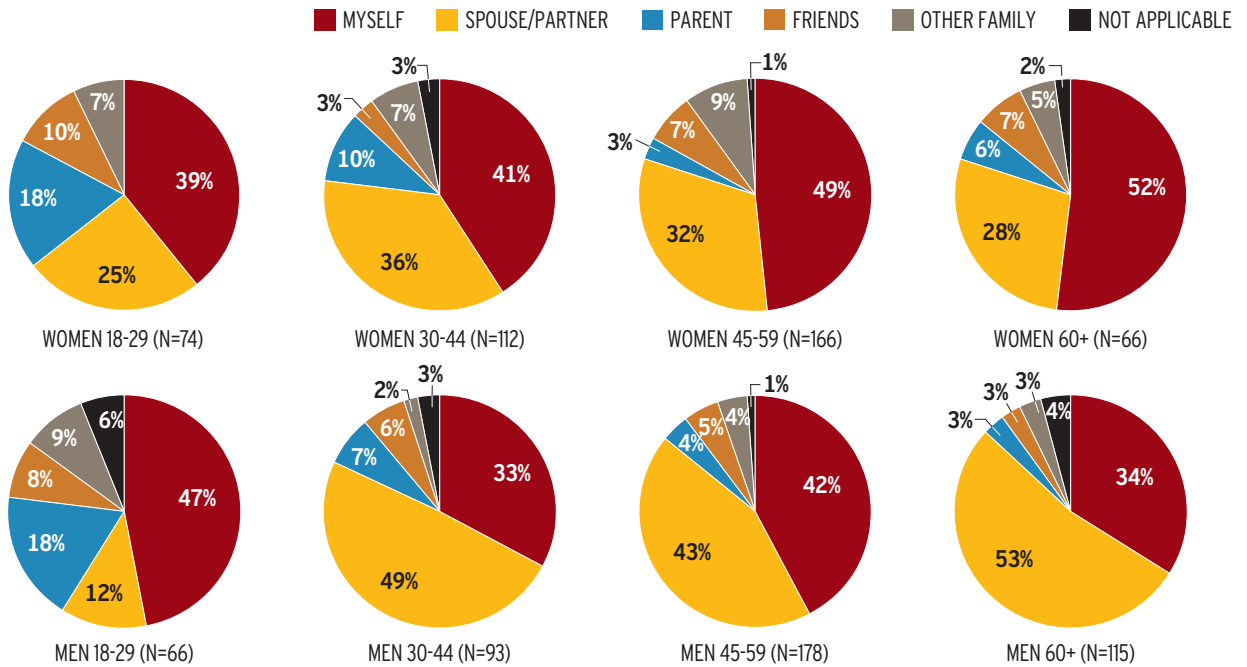
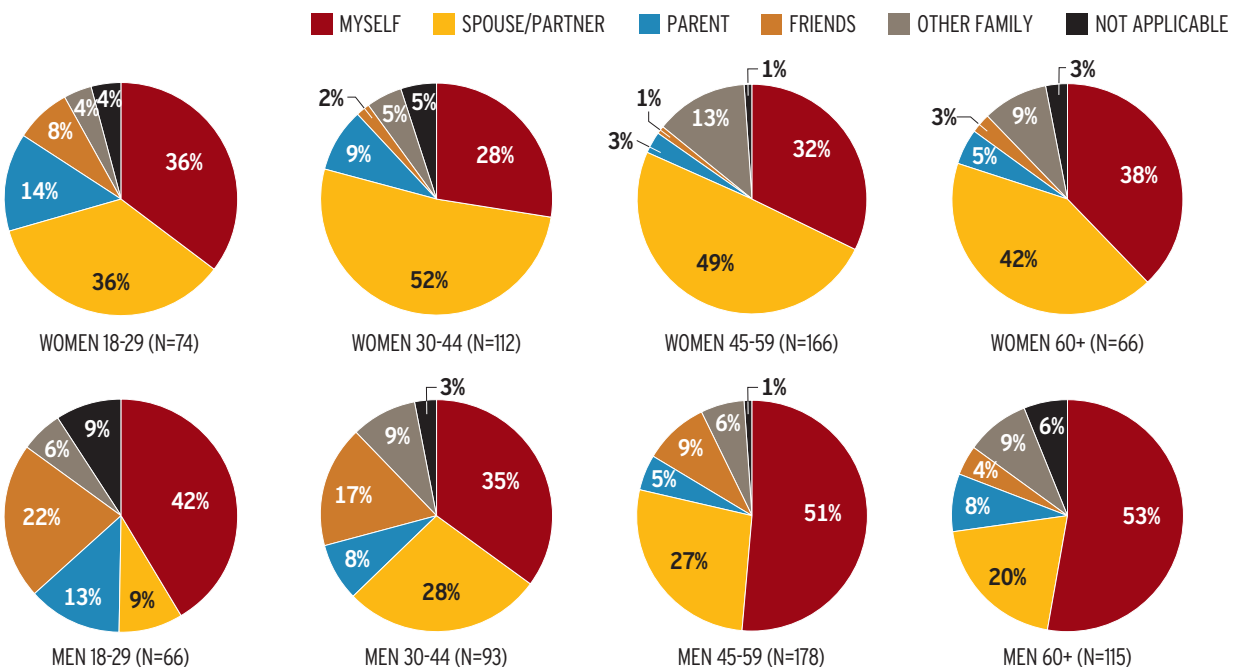


CHART 18: ELECTRONICS PURCHASES

Who has the most influence



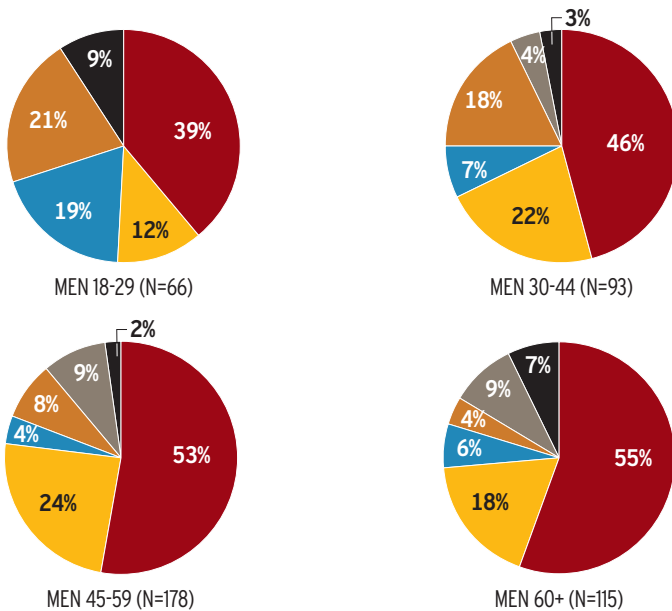
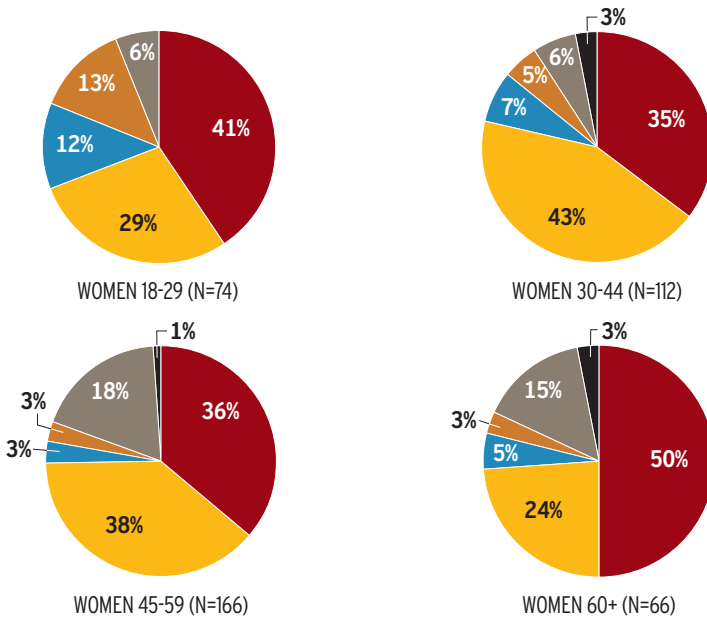
Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey

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CHART 19: TECHNOLOGY PURCHASES

Who has the most influence

■ MYSELF ■ SPOUSE/PARTNER ■ PARENT ■ FRIENDS ■ OTHER FAMILY ■ NOT APPLICABLE



ABOUT THE AUTHORS

Marissa Miley is a Manhattan-based journalist and New York Times best-selling author. She is a former staff reporter at Advertising Age and is studying for her master's degree at Columbia University's Graduate School of Journalism.

Ann Mack is director of trendspotting for JWT, overseeing trends analysis, thought leadership and other content initiatives. She follows trends related to everything from digital technologies, globalization and the economy to retail, philanthropy and the environment, with the aim of converting cultural shifts into opportunities for brands.

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Note: Numbers are rounded; pie charts may not add up to 100%. Source: Advertising Age and JWT survey



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