

Future Perspectives

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Women 2020:

How women's actions
and expectations are
changing the future



Future Perspectives are thought pieces which take a concise, future-focused view of important issues for business and marketing strategists.

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Women 2020

Women represent just under half the global population and are the fastest growing group of consumers worldwide. Yet analyses of their role in society are often one-dimensional and linear. Usually, the examination focuses on how social and economic conditions exert changes on women's roles and identities.

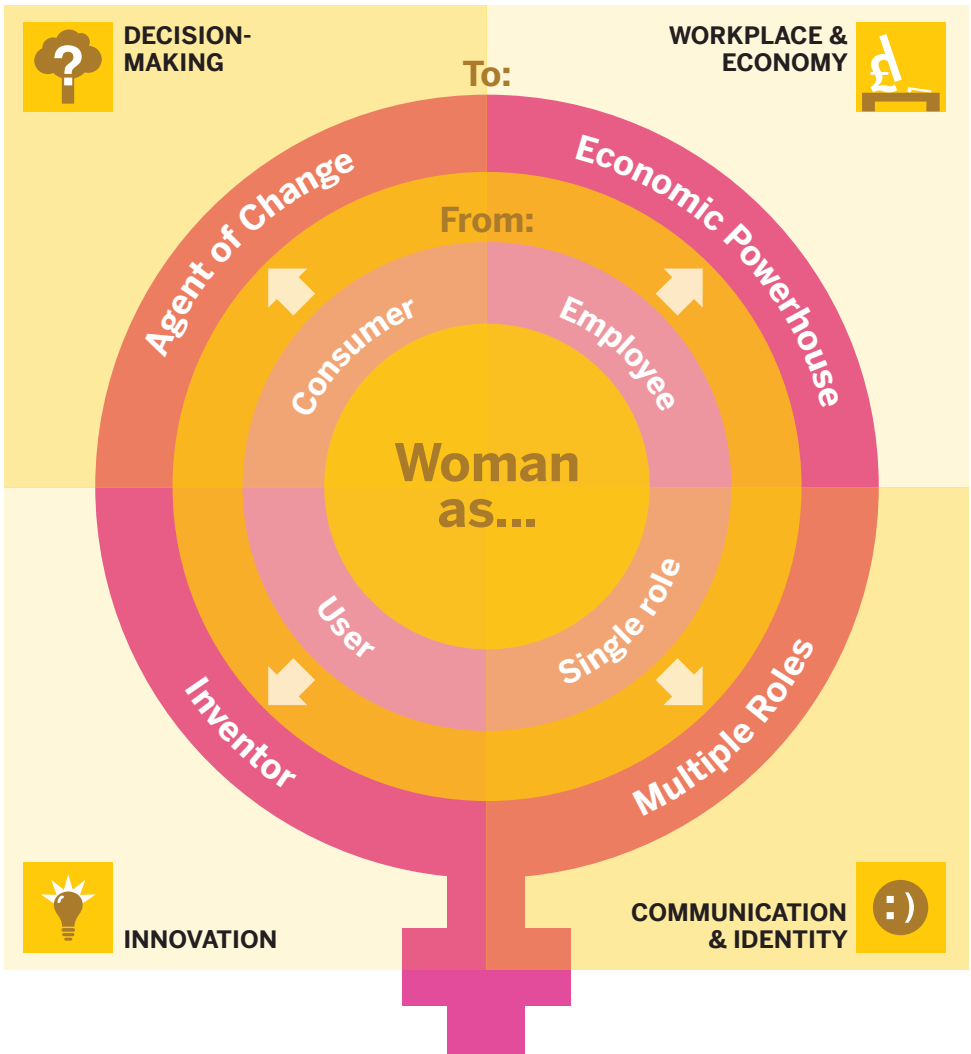
This paper inverts that perspective by exploring how women act as catalysts for fundamental changes, which are shaping not just their own world, but everybody's world.

We show that understanding women is important, both because they are potential new sources of growth, and because the changes in how women think and act have repercussions for their wider society and, by implication, for popular and consumer culture.

There are four key dimensions in which women's changing circumstances, attitudes and behaviors are effecting change:

- **Decision-making**
- **Workplace & economy**
- **Communication & identity**
- **Innovation**

This paper will explore these four dimensions and point to the new opportunities which arise from a world where women act as catalytic agents of change.



Mapping women's experience of economic and social change



Acknowledging that women effect change (as well as being *affected by* change) does not mean that women are always in a position to make pro-active empowered decisions about their own circumstances. Before exploring the four dimensions, is it important to understand that women's agency will be different both *within* and *between* markets. In order to make sense of this diversity of experience between markets, we have developed the **Opportunity Tension Framework**.

One of the key tensions that is often overlooked is the disparity between the rate at which women make progress

in terms of their *economic* contribution to society and the rate of change in terms of the *social and cultural* prominence they are permitted.

It is said that change in attitudes and societal values takes a generation; in the case of the social role of women this change is happening even more slowly. While greater economic participation is positively correlated with social change, changes in women's economic role often outpace changes in their social agency.

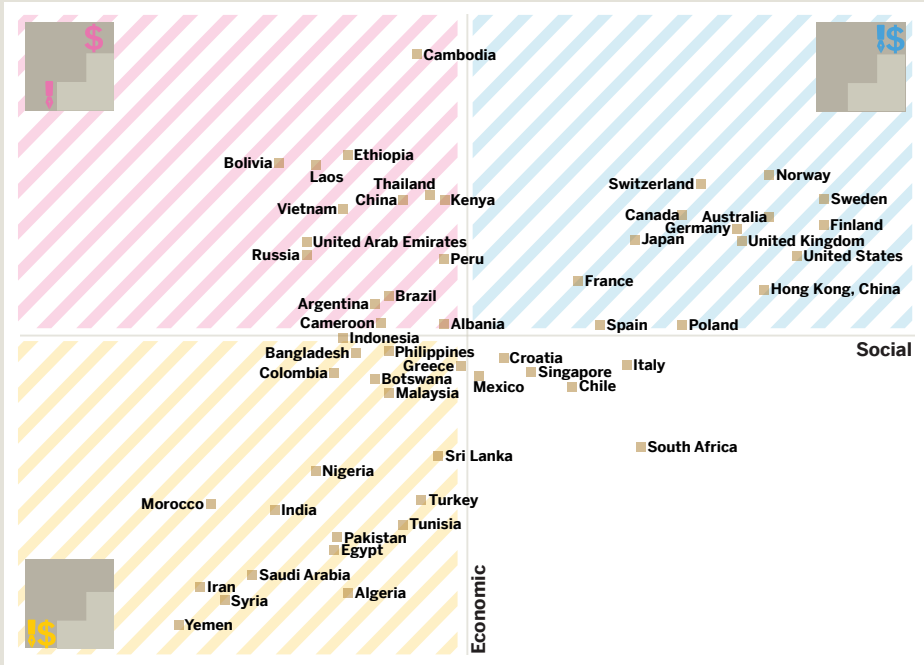
There is a range of factors to evaluate the access women have to opportunities for

greater social agency. These include labor policy, access to finance, access to education, legal and social status of women and business environment. We have used a selection of these factors in our Opportunity Tension Framework.

By taking workforce participation (a factor often taken in isolation as a proxy for progress for women) and charting it against five social factors used in the Economist Opportunity Index, we can see interesting patterns that suggest different correlations between economic and social progress of women in different parts of the world.

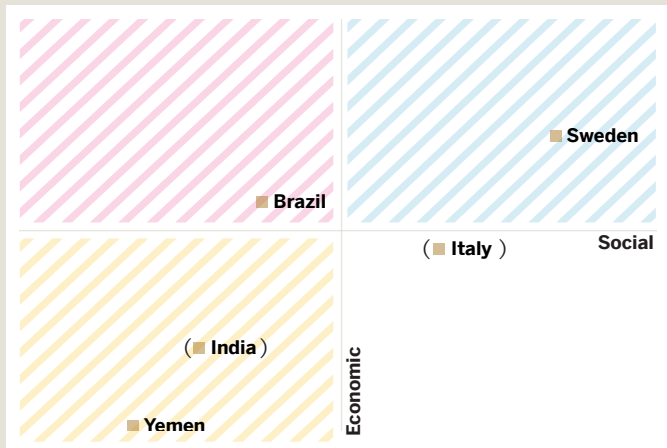
The Opportunity Tension Framework

(Economic vs social participation of women in society)



Social Axis (X) =
 5 x factors from the Economist Opportunity Index: primary and secondary education, women: citizenship rights; political participation; access to technology and energy; gender empowerment measure

Economic Axis (Y) =
 1 x factor from Euromonitor Passport: female employment rate (as a percentage of working age 15–64 female population)



Country examples (and exceptions) in each of the quadrants are explored on pages 7 and 8

Patterns of change across the Opportunity Tension Framework

The chart on page 5 reveals three distinct groups:



Lagging

In the bottom left of the framework, we have markets where women have below average economic participation and below average rights and opportunities. Four of the six CIVETS countries (Colombia, Indonesia, Vietnam, Egypt, Turkey and South Africa) are found in this part of the framework. They are furthest behind, but the economic change curve will be steep when it happens.



Ones to watch

In the top left of the framework, we see markets where women have above average economic participation and below average rights and opportunities. These are markets where women's participation in the formal economy has rapidly grown and outpaced their access to social rights and participation – which have not developed at the same fast rate. These markets are the ones to watch. Three of the BRICs (Brazil, Russia and China but not India) are found in this part of the framework.



Closing the gap

In the top right of the framework, we see markets where women have above average economic participation and above average rights and opportunities. Most of the G8 countries (France, United States, United Kingdom, Russia, Germany, Japan, Italy and Canada) are found in this part of the framework, with the exception of Italy. These are markets with an established balance between economic and social progress for women, where change is slowing.

Selected country examples



Lagging: Yemen

Yemen is an example of one of the countries in the 'lagging' quarter of the framework. Yemeni women are not allowed by law to leave the home without permission from a male family member or an escort. Technically, women are legally entitled to bank accounts and financial services without the consent of a male relative, but in practice this is rarely made possible. These restrictions are often attributed to the observation of sharia law, but as the Economist Intelligence Unit (EIU) observes, it is in fact "a combination of cultural, tribal and religious traditions that have been codified into law."¹ Signs of women finding ways to defy these social conventions have started to emerge: the 2012 Nobel Peace Prize winner, Tawakel Karman, "Mother of the Revolution", has raised the possibility of a more active role for Yemeni women in their society.²



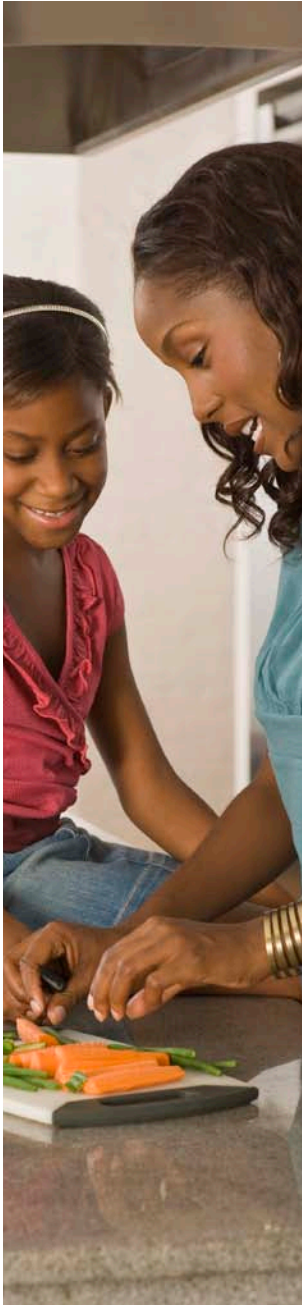
Ones to watch: Brazil

Brazil is an example of one of the countries in the 'ones to watch' quarter of the framework. Change in terms of economic participation is happening fast: there has been a significant increase in workforce participation from 59% to 64% in five years. Women's incomes remain low by western standards, and compared to men's incomes; however, average income for women has increased by 113% in the five years from 2005 to 2010. The number of female students has risen sharply in last five years, by 36%, to 3.5 million.³ And there has been a rapid movement into fields long dominated by men (e.g. construction and trades such as plumbing). Research by the Center for Talent Innovation, a New York think-tank, found that 59% of college-educated Brazilian women described themselves as "very ambitious," compared with just 36% in the United States.⁴



Closing the gap: Sweden

Sweden is an example of one of the countries in the 'Closing the gap' quarter of the framework. It has some of the highest female workforce participation rates in Europe, alongside the other Scandinavian countries. The Global Gender Gap study found the greatest equality between men and women in these markets.⁵ There are nearly twice as many women as men enrolled in tertiary education in Sweden. Almost half (47%) of Swedish MPs are women, one of the highest proportions of women in a national parliament, having introduced voluntary gender quotas in the 1970s. One of the key factors which differentiates Sweden and the others in the top right hand corner is its high levels of affordable childcare provision. In Sweden pre-school places are available from the age of one, and parents spend on average no more than three percent of their household income on childcare.



Exceptions #1: India

Despite being one of the BRIC countries, India appears in the 'lagging' group. Given its levels of rapid economic development, India has an unusually low female employment rate: in 2010 only 32% of the female population was formally employed. A woman's estimated annual income in India is less than a third of a man's income, and the average age of first-time mothers is 19 years. Despite having had a female president, India was recently branded the worst of all the G20 nations to be a woman in a poll of 370 gender specialists from around the world.⁶ However, there are signs of change, at least in terms of economic and educational participation. Burgeoning service industries (call centers, travel agencies, airlines and hotels) are creating demand for more female employees. The number of female students also increased strongly by 52%, to 7.1 million between 2005 and 2010. More women are entering finance and engineering, but progress in terms of economic participation is slow.



Exceptions #2: Italy

Italy is another exception. Despite being one of the G8 countries, it is one of a handful of countries where economic participation lags behind social participation. It has one of the lowest female labor participation rates (less than 47%) in the developed world. Women continue to be employed in typically female-dominated industries such as education, healthcare and social services, which tend to be lower paid. Although the wage gap is smaller in Italy than elsewhere, women make up 75% of the part-time workforce and rarely reach more senior positions. There are few social policies (such as tax incentives, post-maternity re-entry programs, etc.) to encourage people to start a family and birth-rates are among the lowest in Europe.⁷

Drivers of Change: factors shaping the social axis



Drivers of change shaping the factors on the social axis of the Opportunity Tension Framework can be summarized as follows:

1. Access to education and increasing workplace participation

Improvements in access to education on a global scale have contributed to women's increased participation in the

workplace, at a time when male participation has fallen.⁸

Higher or tertiary level education has seen the highest enrolment of women across almost all regions⁹—as economic, political and cultural barriers are eased—driving towards a future of gender parity.

In the US, earnings for women with college degrees have

increased by 33% since 1979, compared to a 20% increase for male college graduates,¹⁰ placing greater emphasis on the role of education in earning potential.

And as women's economic participation levels in the developed world increases to 64%,¹¹ women are continuing to prove their potential as educated economic producers.

2. Developments in science and access to healthcare

Over the last 50 years, developments in and access to reproductive and contraceptive technologies (to varying degrees across the globe) have led women to embrace a greater sense of bodily autonomy.

Women's health is a growing priority with a number of UN Development Goals focusing in particular on maternal health,¹² highlighting increasing knowledge and understanding of women's physiological needs as well as sexual and reproductive rights.

In response, contraception is now back on the global health agenda, appealing specifically to unmet family planning

needs. A recent summit held by the Bill Gates Foundation and the British Government sought to fund access to contraceptives for women in the poorest countries.¹³ Nonetheless contraception, remains controversial, even in some of the most developed markets. The recent health care reform law under the Obama administration, which stipulates that most health insurance plans must cover contraceptives for women free of charge, has come under attack from religious and conservative groups. They denounced it as a threat to religious freedom.¹⁴

Choice is also increasing as we see IVF techniques growing apace, with an estimated

10% of all children set to be born through IVF in Europe by 2020.¹⁵

3. Increasing commercial and political agency

We're seeing the balance of commercial and political power begin to shift, as more educated and able women embrace active roles in politics and business across the globe.

Perhaps because of a tense global political climate, women increasingly view political opinions as a universal right, with 71% having expressed anger at political systems in the year.¹⁶

As a consequence, women are gaining greater political representation across national parliaments, rising to an average of around 20%,¹⁷ as well as winning positions in high office; Thailand¹⁸ and Malawi¹⁹ voted in their first female presidents in 2011 and 2012.

Women's power also extends to being an engine of business growth. Companies with more women on their boards of directors outperform those with fewer on a number of measures, as discussed on page 21. This suggests that strong female representation in corporate leadership directly correlates with a company's financial performance.²⁰



Dimension 1: Decision-making



From: Consumer To: Agent of Change

Understanding women's decision-making—in life-stages, lifestyles and purchasing—is becoming increasingly important, in particular due to significant change for women in the area of control and choice. It is through their decision-making that their ability is manifested to act as catalysts of change.

As life expectancy increases, the traditional life stage trajectory will change. By 2050, global average life expectancy is predicted to be 75 years (up from 65 years in 2000-2005); in developed countries, it will be 82 years.²¹ In North America and Europe, many people are choosing—and need—to work past traditional retirement age. Others see retirement

as a chance to do something more fulfilling.²² Shifting life stages and lifestyle choices are starting to have a marked impact on the shape and size of households.

Remaining childfree is an increasingly appealing lifestyle choice, chosen by 43% of Gen X women in the UK and the US.²³ As they invest in themselves, women are delaying or forgoing marriage. In Eastern Europe, co-habitation is becoming a common precursor or alternative to marriage, which—coupled with increasing divorce rates—accounts for a reduction in the number of marriages. Asians are marrying later, and less, than in the past.²⁴ There has been a rapid increase in the number of women in Asia who remain unmarried and have never married or cohabited. In Thailand, the

number of women entering their forties having never been married has gone up from seven percent in 1980 to 12% in 2010; the rate in Bangkok as high as 20%.

The Economist has reported that in South Korea young men complain that women are on “marriage strike.”²⁵ The decision of women to remain single is having a significant impact on the growing numbers of single person households, a phenomenon which is gaining visibility through publications such as *Going Solo: The Extraordinary Rise and Surprising Appeal of Living Alone*.²⁶

The tension between tradition and modernity is sharpened as emerging markets develop. The pursuit of a better life is tinged with a desire to keep the best of the past.²⁷ Kavita Ramdas observes that women in most countries are both “viciously oppressed by cultural practices and at the same time the preservers

64% of women rate the value of “having the freedom to make my own choices” as an essential guiding principle in life.

Global MONITOR 2012

From individual spending to family budgeting

In developed markets, women have for many years been considered to 'hold the purse strings'. In the US, women control 73% of household spending, the equivalent of more than \$4 trillion in annual discretionary spending.³³ In emerging markets, women are beginning to have more earning power, but their spending patterns are very different to men's and often more fragmented. Where men will spend on themselves and on recreation, women are more likely to be supporting more than one dependant. When women and girls earn income, they reinvest 90% of it into their families, as compared to only 30–40% for men.³⁴ As women in developing markets gain more autonomy and freedom, they become both decision-makers for big-ticket items and also, importantly, consumers of previously male dominated categories. Brands designed for women increasingly shape the mainstream markets for categories traditionally dominated by men.

of culture."²⁸ In Middle Eastern states, the roles of women are changing with greater opportunities and encouragement to work, drive and vote but there are also cultural and personal expectations to fulfill the traditional role of being the homemaker.²⁹

Education has a large role to play in women's expectations about marriage. In Iran, women now account for nearly 60% of university enrolments. A recent *New York Times* article notes that having raised their horizons during four years of university, "many of these women have trouble finding

husbands they consider their equals."³⁰

There has been a proliferation of online dating sites catering to particular tastes and criteria. Sites like Jdate.com ("The Leading Jewish Singles Network") and Shaadi.com (positioned as "The World's Largest Matrimonial Service" with offerings for those seeking Bengali, Gujarati, Hindi partners, among others) are increasingly making it possible to play by the cultural rules and expectations, while still creating some element of choice. Some parts of the role of the parent in Asian cultures in finding a suitable



match for their child have been taken online; allowing women to cast their nets wider, while still conforming to and maintaining tradition.

In our own client work we have found in Africa further examples of women using technology to maintain social convention, while extending the boundaries of the limitations imposed on them. In Nigeria, women have started using mobile phones to make one-to-one business calls with male colleagues and clients, although it would be deemed inappropriate for them to meet in person without a chaperone. Technology creates precedents where the rules have not yet been set in terms of social conventions or gendered behaviors.

As women become more economically active and gain greater independence, cultural norms gradually begin to soften. For example, in India it is reported that "As the economy has boomed, the rigid boundaries governing traditional Indian life are beginning to fall, especially among the growing urban middle class. Dating among twentysomethings is growing popular, love matches (as opposed to arranged marriages) don't provoke the family scandals

In the US, the average social gamer is a 43 year-old woman.³⁵

they once did and divorce is no longer out of bounds."³¹ Even in markets such as Iran, there are signs of change. In the last decade in Iran divorces have more than doubled, prompting society to begin to accept single women.³² Change in terms of social conventions and opportunities for women is much slower than economic change, but it is happening.

Dated attitudes to aging

With shifting life stages, expectations based on age start to change, allowing for greater expressions of identity.³⁶ 83% of US Baby Boomers "don't feel constrained by social expectations about what is or is not appropriate for someone of my age or gender." 68% say they will be physically and mentally capable of working into their seventies and eighties.³⁷ This is now being reflected in attitudes to age and beauty, with campaigns and product ranges such as Dove's Pro-Age, and the increasing visibility of older models such as Daphne Selfe.³⁸





Women and urbanization in China

China's cities contain more than 690 million people,³⁹ of whom 40% are rural migrants.⁴⁰ Women who leave their agricultural villages for urban life are typically seeking the wages available in China's factories. While many succeed in supporting the families they left behind, their departure means rural towns are often populated by the old and the young with few in between. Many women don't take their children with them to the city as China's *hukou* resident classification system means migrants do not have equal access to education and health care benefits. However, the government is aware of a need to redraft these laws in the face of urbanization and social unrest, and plans to extend social benefits to a majority of migrant mothers by the end of 2012.⁴¹

Hukou is not the only source of inequality between urban and rural women. Rural areas generally have inconsistent, low quality

education systems that put rural women seeking professional urban work at a serious disadvantage. The government has implemented education initiatives to reduce the cost of education in the countryside and is encouraging skilled urban teachers to spend a few years working in rural schools.⁴²

While China's urban population is expected to increase by more than 130 million by 2020,⁴³ there is a question as to whether the job market will keep up with this growth. Currently, exports constitute a huge part of China's economy and are vulnerable to a global slowdown.

To mitigate the problem that would result if demand for Chinese exports falters, China needs to develop a domestic consumer base. With urban Chinese women matching and in many cases surpassing the educational and workplace representation of their male counterparts, many are investing in clothes, beauty products and homeware at an unprecedented rate.⁴⁴ This increased purchasing power challenges the norm of women as familial caretakers and positions them as the potential backbone of an emerging consumer market.



Boomerang motherhood

The counter trend to the growth in single person households is a generation of Millennials who return to live at home in their twenties and thirties, due to high rents, debts and unemployment. Referred to variously as the 'boomerang generation', NEETs (not in education, employment, or training) or by more localized names, e.g. in Italy *bamboccione*. According to the Office of National Statistics, in the UK alone more than three million 20-34 year olds are living at home with their parents, or one in four people in this age group.⁴⁵ This pattern is extending the usual timeframe during which women are supporting their children, and putting greater financial pressure on 60+ parents approaching or in retirement. In developed Asia, postgraduate unemployment means more NEETs are returning home, extending the number of years parents must support their offspring.⁴⁶



The changing role of women in the Arab world

The role of women within the Arab world is changing. Many Arab nations have traditionally embraced a sense of high conservatism grounded in dictatorial politics and strict religious doctrines. This has helped to shape a number of decade-long myths of Arab women that are beginning to shatter.

Traditionally, Arab women have been perceived as reserved in society, signified by religious dress dictated by socio-religious codes. Their lack of political and economic standing is conducive of their subordination to male counterparts. And where women have begun to stand up to political and societal injustices, they have faced severe gender-based harassment and punishment.

However, with many Arab countries facing political instability, there is a growing sense that women feel that they can have a deeper and more equal role to play in modernizing society, and have

the authority to begin shaping their independent and personal destinies.

In a recent survey, 82% of Arab women believed that the level of participation of women in the political and socio-economic agendas of their countries is moderately to substantially better than it was five years ago.⁴⁰

This new model for the participatory role of women in the Arab world is seen at its starkest during the recent activism in the Arab Spring, which saw women of all ages take part in political protests across the Gulf, adopting roles typically reserved for men, which gave them a unique taste of political freedom and societal change.

Traditionally, political instability, cultural legacy and religious doctrine has precluded women's involvement in political domains. However, this is changing. In Algeria, 31% of their elected parliament are female,⁴¹ the highest in the Arab world and more than in many European parliaments.

After all, many Arab women are striving for equality within society and a voice within political and socio-economic agendas, and to advance as leaders in business, politics, media and creative industries

and beyond. With more women in employment in Arab countries than ever before, this is fast becoming a reality.

Of the 100 most powerful Arab women in 2012, almost half are from diverse cultural backgrounds,⁴² including film-makers, entertainers and businesswomen. The top of the list, UAE's female first minister, Sheikha Lubna, combines political and diplomatic expertise with business acumen. She leads trade development strategy and has also launched her own perfume range.

So ultimately, the role of women within the Arab world is changing rapidly. Independence and equality is on the agenda and as a result, traditional perceptions are increasingly challenged.



What to expect in the future

1. Pushed back life stages

Expect less of a correlation between age and life stage, as the classic life stages are prolonged to match longer lifespans, later first children and later retirement.

Opportunity

Identify and understand segments in a way that isn't tied to age, but rather to an extended lifestage model and the new mindsets which emerge from it.

2. Living Solo

Expect single person households to continue to grow, as acceptability of women living independently grows and as more women chose to remain unmarried.

Opportunity

Explore new needs arising from women choosing to live alone (from home decoration, trades and social needs) and devices which consolidate functions and purposes.

3. Finding ways to play within the rules

Expect women to continue to find ways to preserve some of the main traditions and cultural conventions of their societies, while finding ways to play within them – doing old things in new ways. Optimizing to achieve

gradual change, rather than revolutionizing to create dramatic, immediate change.

Opportunity

Identify ways to help resolve the tension between tradition and modernity.

4. Shifting patterns in male-dominated categories/new audiences for established categories

Expect categories with a typically male-dominated consumer base, e.g. gaming, automobile, alcohol, to adapt to the opportunity in the female market.

Opportunity

Find new growth in established categories, in emerging as well as in established markets.

5. Where and when

Expect women's use of technology and media to increase, and greater demand for synergy and synchronization between online and offline experiences. Automization of certain regular purchases or transactions is likely to become common, to streamline household responsibilities. More efficient aggregator and curator sites, which offer curated choice combined

with user reviews to facilitate decision-making, will become even more popular.

Opportunity

Be the curator and shape the conversation in online spaces. Explore ways to support automization of certain regular purchases to enter default buying patterns.

6. Gateway spending

Expect access to other audiences through women. As women's earning power increases their role as holder of the purse strings will become more prominent. Their spending is focused not only on themselves, but on the people they support and care for (children, partners, parents, etc.). This means it will be important to think of women not only as having an increased income, but as redistributors of their spending.

Opportunity

Understand that there is more than one consumer to be reached through women. Greater understanding of their decision-making patterns and purchase journeys will be required, not only to reach them as consumers, but other potential audiences in their circle of care.



“When we asked women to paint a vision of their ideal digital

future... they talked about wanting more synchronicity between devices, and greater synergy between online and offline experiences, especially with respect to shopping”

Dayna Dion, Cultural Strategy Director, Ogilvy & Mather



Dimension 2: The workplace and the economy



From: Employee To: Economic Powerhouse

Big shifts in women's relationship with and role in the workplace are having an impact on everything from national GDP, to family life. How employers adapt to these changes will be central to their ability to make the most of the workforce.

Women are the world's greatest underdeveloped source of labor, with nearly one half of working-age women not currently active in the formal global economy.⁵⁰ In the US alone, the additional productive power of women entering the workforce since 1970 to the present day accounted for about a quarter of the economy in 2011.⁵¹ For the past century female workforce participation

figures have grown steadily across the globe. While in some markets women's workforce participation is starting to reach a plateau, in others women represented an untapped source of economic growth.

But workforce participation figures obscure some important nuances. Women are more likely to be employed in the informal economy, and are less likely to occupy senior positions.⁵² Just twelve Fortune 500 companies are run by women.⁵³ Women are also—across all markets—paid less than men for the same work. According to the OECD, in most countries the average female wage is still less

than 90% of the average male wage. In some markets the gap is even wider, with women in Japan and South Korea earning less than 70% of the average male wage.⁵⁴

Even in markets where the pay gap is closing and pay parity (equal pay for equal work) is being achieved, this changes dramatically after a woman has a child, when the pay gap opens up again. Research shows that women who had previously never felt disadvantaged by their gender in the workplace, suddenly find themselves feeling side-tracked (or more accurately 'slow-tracked') in terms of pay and access to promotions.

The shape of women's career pathways

It seems likely that the ideal shape of a woman's career path will need to be revisited. Historically the career trajectory has been about consistent progress up the career ladder, which is often irreparably interrupted at the first child. An alternative model proposed by Benko and Weisberg is that of irregular 'stairstepping' whereby women make gradual progress until their first child, maybe go part-time or try an alternative form of employment while their children are young, and then reach the peak of their career in their forties when their children leave for college. Such a redefinition of the pathway of a successful career would also start to shift life stages, creating a new phase of life, with distinctive characteristics during a woman's forties.



“The point at which the pay gap starts to open [in the UK] is the point at which a woman has children... That to me is a very powerful point when you start to feel your gender. You might not have felt disadvantaged before then, but after that you will feel it.”

Dr Tracey Jensen,
Lecturer in Media
and Cultural Studies,
University of Newcastle

Women in many developed countries are more educated than their male counterparts. In fact, women now outnumber men in higher education everywhere except sub-Saharan Africa and China.⁵⁵ But this is not translating into more women in leadership positions.

As Sheryl Sandberg, COO of Facebook, reminded her audience at a TED conference, a non-profit series of conferences devoted to “ideas worth spreading” in Technology, Entertainment and Design, women still have a long way to go to gain representation in leadership roles: “Of the 190 heads of state, nine are women. Of all the people in parliament in the world, 13% are women.

In the corporate sector, women at the top, C level jobs and board seats, tops out at 15, 16%... Even in the non-profit world... women at the top are only 20%.”⁵⁶ Change is slow: McKinsey estimates that at current rates of change, women will still account for under 20% of seats on Europe’s executive committees in 2022.⁵⁷

In a recent article in *The Atlantic*, Anne-Marie Slaughter made the case for “why women still can’t have it all”. She pointed towards a change of expectations for women in developed markets, which distinguishes the current generation of young women from the generation before them. Women born in the late 1950s and 1960s who entered the workforce in the late 1970s and 1980s believed that they could have it all. For them, that meant that “women should be able to have both careers and families in the same measure and to the same degree that men do.”⁵⁸ However, the younger women of the Millennial generation (Gen Y) are increasingly accepting that there are likely to be trade-offs when it comes to starting a family. That is to say, many women feel they face an either/or choice between family and career—that in practice the two are mutually exclusive.

“In a post-industrial society where women are educated, if you really force that choice [between career and motherhood], you’ll end up with a lot of women who choose the career, and birth rates of 1.2 to 1.4 children per woman. Long-term GDP growth flatlines, pension schemes become unaffordable, and a lot of things start to go wrong.”

Gender Norms, Democracy in America, *The Economist*⁵⁹



The secret to resolving this tension seems to lie, overwhelmingly, in access to affordable childcare. In the UK, the cost of childcare for two pre-school children represents a third of average household income.⁶⁰ For many women staying at home is more affordable than paying for childcare from income earned at work. An analysis of the EIU Women's Economic Opportunity Index shows that the countries which score highest in terms of economic opportunity for women are also those which have strong public policy which creates provision of childcare for all women. In Sweden, top of the EIU Women's Economic Opportunity Index, local municipalities are obliged to provide day care to children under 12 whose parents are working or studying, and high quality private day care is also available, costing between one percent and three percent of household income.⁶¹

Some encouraging changes are happening: globally, 81% of large companies now offer flex-work options in the recognition that this helps employees manage work/life balance and saves money.⁶² However, statistics such as these don't acknowledge the distinction between companies offering flex-work options and workplace culture making it acceptable to take up the option without being judged by management or peers. One proposed solution to this lies in the behavioral economics principle of the 'default option', whereby people are more likely to select options that are considered mainstream, rather than being seen to go against the grain. In her *Atlantic* article, Slaughter proposes the 'normalization' of face-to-face meetings during school hours and dial-ins outside of school hours.⁶³

Aside from the practical barrier of childcare provision, other workplace biases that have impeded women's progress are starting to change. In the past the qualities rewarded with promotions and higher pay have been gendered-male qualities. A recent McKinsey survey in Europe found that while 65% of men believe that the evaluation system

in their company treats men and women equally, only 30% of women agree.⁶⁴ Characteristics which are typically associated with women include being 'friendly, emotional, and unselfish', however, as Robin Ely identifies, these are traits which are at odds with widely held beliefs about what a leader should be: 'assertive, self-confident, and entrepreneurial', typically considered male traits. What's more, she adds, when women exhibit these characteristics they run the risk of being seen as "abrasive instead of assertive, arrogant instead of self-confident, and self-promoting instead of entrepreneurial."⁶⁵ However, there is a shift happening. In a world of project-based work, flatter teams, and matrix-based organizations, traditional ideas about what makes an effective manager are becoming less 'male'.

While deeply engrained socially-conditioned norms are likely to change only slowly there are some organizational changes that will become increasingly prevalent in employers' attempts to address diversity in the workplace. A quantifiable case for the value of retaining and developing women to board level is beginning to emerge.

A recent report demonstrated that companies with the most women on their boards of directors outperform those with the fewest women on their boards, with return on invested capital at 66% higher in firms with strong female representation. Fortune 500 firms with the best record of promoting women to senior positions, including their board of directors, are more profitable than their peers.⁶⁶



“There’s been this light-bulb moment with aid and international

development agencies that actually, if you don’t push women into a more prominent position you’re not going to get the results. It’s through women that we’re making progress.”

Caroline Hurford, Public Information Officer, UN World Food Programme

Women as the key to reducing poverty

Women create economic growth and play a critical role in the elimination of poverty, and their contribution is fundamental to a number of aid associations’ strategies to target health, nutrition, education and poverty in developing countries. Micro-finance schemes are more successful when run through women, who are more likely to reinvest in their communities. A more recent model that has been developed which is also yielding results with women is micro-consignment.

The MCM (Micro Consignment Model), developed by the Ashoka Fellow, Greg Van Kirk, acts as an initial distribution channel to provide access to basic products: eyeglasses, water filtration buckets, stoves and solar lamps, for rural villagers in ‘base of the pyramid’ markets.

It creates opportunities for villagers to act as micro-entrepreneurs arming individuals with the education, training and products necessary to market and sell essential products in developing

countries, especially in remoter rural areas.

One example of a brand demonstrating leadership in this space and investing in women as agents of change is Coca-Cola’s ‘Five by Twenty’ campaign,⁶⁷ which aims to enable the economic empowerment of five million women across its global value chain by 2020.



Opportunities also exist to partner with aid agencies who work closely with women in developing markets. For example, Tilda’s partnership with the UN World Food Programme through an initiative called ‘Mums Helping Mums’.⁶⁸ Tilda donates the cost of a nutritious meal to the World Food Programme for every 1kg pack sold, thereby connecting mothers in the UK with their counterparts in the developing world.



Culturally conditioned careers: the STEM story

Traditionally there have been some industries that have been dominated by men, and others by women. This is down to two main factors. The first is that when work was largely agricultural or manual, there was a bias towards physical strength which put men at an advantage. In fact, there are still countries in which women are actively excluded from work which involves lifting or heavy physical labor.⁶⁹ The second is that certain career paths are socially conditioned to be gendered, for example in industries concentrated around 'the five cs': Caring, Cashiering, Catering, Cleaning and Clerical. In the UK, for example, this 'gendering' of industries is very visible, with 60% of female workers employed in the 'five Cs' sectors, where pay tends to be lower.⁷⁰

A report by the Women and Work Commission calls this 'occupational segregation', and blames it on gender stereotypes established in school, where girls are still encouraged to enter traditionally female-gendered roles.⁶³ There are market-specific cultural factors at play here too

in the gendering of certain industries. In China women are often encouraged to become secretaries, tour guides and hostesses, rather than lawyers, managers and executives.⁷¹ These gender biases in industries lead to an even greater disparity in pay and social status and in how valued those roles are in society as a whole.

Gender bias in industries leads to even greater disparities in pay and status

Nowhere is this more visible than in the STEM (Science, Technology, Engineering, and Mathematics) disciplines.

A report by the US Department of Commerce found that women are vastly underrepresented in STEM jobs and among STEM degree holders despite making up nearly half of the US workforce and half of the college-educated workforce.⁷³ Why is it important? STEM is a growth sector,⁷⁴ so more

women in STEM would mean long-term job security and prospects for women. What's more, the pay gap is significantly smaller in STEM fields than in other sectors in the US. Women in non-STEM careers face a 21% gap, while women in STEM fields face a pay gap of around 14% to their male counterparts.⁷⁵

In the UK, a man is six times more likely to work in a science, engineering or technology occupation than a woman.⁷⁶ Much of this is down to decisions about subject choice at school and university. For example, the number of female students graduating in STEM subjects is in decline. In 2005 women made up 24% of computer science students in higher education; by 2010 they made up just 19%.⁷⁷

Ceri Goddard, chief executive of the Fawcett Society, argues that this is down to a lack of understanding of the distinction between economic and social/cultural progress: "We assumed that because women were moving into economic life all of our social and cultural stereotypes would just disappear, the truth is that we have only just started to

STEM: Science, Technology, Engineering and Mathematics

challenge the notion that women are good at the caring professions while men are good at logic, science and industry. This divide is fuelling the gender pay gap.”⁷⁸



However, there are signs that some cultures, particularly in Asia, are bucking the gendered-industries stereotype. This is largely due to emerging markets having more students overall graduating in those disciplines. A third of all Bachelor's degrees in the US are in STEM fields, compared to 53% of first degrees in China and 63% in Japan. Each year, India produces about twice as many engineering and computing graduates as America.⁷⁹

There is evidence of developed markets taking action to try and rectify this underrepresentation, largely because it is seen as an investment in economic

competitiveness. In the US, President Obama's administration has developed "Educate to Innovate" strategies, which aim to increase participation by women and girls in STEM.

Similarly efforts are being made in Europe. Recently the European Commission released an advert as part of their campaign 'Science: It's a girl thing' to try and encourage more girls to study science. The advert shows three girls in a

lab, which turns into a runway (or catwalk) on which they interact with various glamorized pieces of scientific equipment. The campaign was heavily criticized for its communication approach ("it has lipsticks but no lab coats").⁸⁰ Nonetheless, it demonstrated investment in redressing the balance. Other non-government examples include Little Miss Geek, a campaigning agency working to inspire women to consider a career in technology.

In contrast, in developed markets, there is also a counter pattern emerging with increasing numbers of men moving into typically female dominated professions. In 2010, the number of men applying to become teachers in UK grew by almost 50%.⁸¹ In the US, the *New York Times* reported that between 2000 and 2010 occupations that are more than 70% female accounted for almost a third of all job growth for men.⁸² These changes signal a shift that could undermine the dynamics dominating culturally-conditioned gendered careers.



What to expect in the future

1. Economic growth will outpace social progress

Rapid economic development will continue to happen in markets where workforce participation in the formal economy hasn't yet reached capacity (e.g. Japan and South Korea). However, tensions will arise in these markets from the disparity in the pace of change between earning potential/contribution to the economy and social change in women's opportunities to act with greater autonomy.

Opportunity

Acknowledge and resolve the cultural tension emerging from this disparity in pace of change and the new needs and positioning territories that this tension might bring.

2. Childcare is everyone's business

Expect increasing politicization of childcare, especially in markets where women are highly economically and socially active ('closing the gap' markets). Governments will be obliged to take a longer term view of the impact of making cuts in children's services, particularly if this means fewer women are able to return to the workforce.

Change here is likely to be slow, and will come into force sooner in more established markets, following suit of the Scandinavian markets. There is the possibility of this affecting school hours and terms to mirror working patterns, and adapt to growing number of dual income families.

Opportunity

Play a leadership role in rolling out initiatives which facilitate real choice for new parents, and retain female talent. The business case for retaining talent will be championed by leading businesses.

3. 'Trade-off' lifestyle choices

In the shorter term, there is a reversal of the Gen X-ers' belief that women can 'have it all', to a generation of Gen Y women, who feel they are likely to have to weigh up the 'trade-off' with the goal of achieving wellbeing and balance, rather than rapidly climbing the career ladder. This will persist until greater progress is made with childcare provision to take the 'either/or' out of the 'work vs starting a family' equation for women.

Opportunity

Smart employers will attract and keep the best women employees by supporting accessible childcare provision for all parents and make flexible working a genuine or default option.

4. Forties is the new thirties

With the pushing back of life stages, women experiencing a 'pause' in their progress in their thirties, there will be a new interest in women's forties. Expect a re-evaluation of the current model of a steep climb to being 'established' before first child, to what has been called, by Benko and Weisberg, irregular stairstepping, meaning that women reach a career peak in their forties when their kids leave for college. Brands will start to take an interest in this opportunity.

Opportunity

Focus on new audiences and play a role in shaping a changing space where new identities may emerge. Innovate for new 'life stage-based' needs.



5. Business case not feminist cause

Organizations will need to examine which skills and competencies are valuable in their workplace and lead to business growth. This is likely to affect policies to evaluate a broader set of skills and contributions, and promotion models in order to remove socially conditioned biases around behavioral characteristics of success.

Opportunity

Articulate the business case for initiatives which redress the gender biases in

evaluation and remuneration, which often contribute to gender imbalances in leadership positions.

6. Counter-currents in career choices

Decisions regarding career paths will be based more on growth areas in industry and long-term employment prospects than socially-conditioned gendered skills and paths. In markets like the US with an aging population, this will mean men moving into traditionally female-dominated caring

professions. In markets such as China and India with growing tech and engineering industries, this is likely to mean a faster elimination of the longstanding gender imbalance in the STEM (Science, Technology, Engineering and Math) sectors.

Opportunity

Support the transition into and out of typically male- or female-dominated industries and seek ways to take advantage of the influx of new skills.

Dimension 3: Communication & Identity



From: Single Role
To: Multiple Roles

As the decisions women make and the role they play in society changes, so too does the way they consider and express their identities. The evolution of communications to, from and among women depends on how these shifts are understood and reflected in popular and consumer culture.

Women are faced with more choices than ever – and while the types of choices and their breadth varies dramatically from market to market, choice (expectation and reality of it) are a central dynamic in women's lives. As they have moved into the workplace and become more socially independent, their repertoire of roles has become increasingly broad. Understanding this multidimensionality of women's lives is key for brands.

As the choices women are able to make increase, so too does the pressure of decision-making, in terms of what to prioritize day to day and how best to sequence the stages of their lives.

Multiple roles need good energy management

In emerging markets where new members of the global middle class are adjusting to the pace and opportunities in the marketplace, time continues to be the biggest pressure. Women are under particular pressure as they are expected to excel in a growing number of roles. Women are increasingly looking to brands to provide convenience and time-saving solutions in their busy lives. But at the same time, convenience is not enough and women look for solutions to help them manage their energy levels, to pick up pace and relax as the occasion demands.

Household chores and preparing kids' meals cause pressure for around 12% more women than men, suggesting that the homemaker is still a role that women are expected to fulfill.

Global MONITOR 2012

Much of this pressure is rooted in the tension between professional life (career) and home life (family).

With working mothers no longer exceptional, there is starting to be a convergence of roles in the home, supported by both cultural and public policy change in developed markets. In the UK, new paternity leave rules came into effect last year

meaning that parents will be legally entitled to share time off work during their baby's first year.⁸³ In Iceland and Germany, paternity leave entitlement is closer to that for maternity leave, allowing both parents to contribute to their child's first months.⁸⁴

Men are becoming more visible in new roles: the number of stay-at-home fathers in the UK has risen tenfold in the last decade.⁸⁵ There is starting to be some acknowledgement, at least in the language of public policy in western markets, of the more equal weight between the role of mother and father. Last year, the US State Department decided to make US passport application forms more "gender neutral" by removing references to mother and father.⁸⁶

Nonetheless, some characteristics of socially conditioned roles/gender norms for household responsibilities persist. According to a recent survey by the Institute for Public Policy Research in the UK, married women still shoulder the larger share of domestic chores; 80% of married women do more household chores, and just one in 10 married men do an equal amount of cleaning and washing as their wives.⁸⁷

Recent data suggests that urban American 20-something women are making more money than men of the same age.⁸⁸ Similar data are seen in Western Europe. The threat to the traditional male role and erosion of men's sense of purpose as main breadwinner has led to concerns about men's mental health. Men are losing out in terms of education, relationships and work, as captured in Kay Hymowitz's 2011 book *Manning Up*.⁸⁹ According to a 2011 study, the number of men with depression will rise because of socio-economic change and shifting gender roles.⁹⁰ Yet men remain less likely than women to seek professional advice for mental health issues.

With such dramatic changes in the roles women have in society, there are also shifts occurring in how women think of themselves and define their own identity.

Historically, ideals of femininity were expressed as a male ideal of beauty and sexual attractiveness. This male-directed ideal of female identity has been perpetuated for many years, and is captured in TV drama series *Mad Men* by advertising executive Don Draper's remark to explain

Being the main earner in the household is almost as important for women as it is for men – with 64% of women compared to 73% of men citing it as a signifier of success.

Global MONITOR 2012

the type of woman which appeared in an advert for a diet drink: "You understand how this works... men want her [therefore] women want to be her."⁹¹ In contrast, we are now starting to observe an ideal of femininity which takes more of the attitude that "Women want to be her because other women admire her."

Ideals of Female Identity



Male-directed Ideal

Female identity defined relative to women's role in men's lives



Real Beauty

Female identity explored through the lens of authenticity and natural physical attributes



Real Femininity

Female identity defined by ideal qualities — internal and external — that are admired in women by other women

There is recognition of the importance of focusing on inner-directed goals, rather than seeking validation outside, evidenced by the success of magazines such as *Psychologies* in the UK, which aim to enrich readers' emotional life. This new feminine identity is in a state of flux and both popular culture and communications are still exploring what femininity is when it isn't defined by male-directed ideals. Pop artists such as Adele, Lady Gaga and Nicki Minaj channel these new, more powerful visions of femininity, capturing young women's imaginations and desire for self-expression.

The communications industry has been slow to adapt its portrayal of women to reflect

these emerging identities. But some leader brands have captured a female aspiration based on female strength and on succeeding on your own terms. A recent campaign for Sure Maximum Protection runs with the idea of unapologetic feminine strength: "Women are strong. Not strong 'with an asterisk', not strong 'but', strong 'full stop.'" ⁹² Nike takes a similarly powerful stance on women defying social convention and being unabashedly motivated, competitive and driven. Its recent Voices commercial captures the new desire of women to be seen as competent and successful, in the context of sport, but in a way that could be applied more widely to the emerging zeitgeist of femininity. ⁹³



"There's definitely a movement emerging towards this

mentality of: she's the woman that women want to be because she's a leader, because she's confident in who she is and grounded in her identity.

I really believe that the new benchmark for women is 'are other women inspired by her?'"

Dayna Dion,
Cultural Strategy Director,
Ogilvy & Mather

72% of women rate the value of being honest and genuine as an essential guiding principle in life, compared to only 66% of men

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The likability problem

A key issue which will continue to be a thorn in the side of the new ideal of femininity is how women express and embody success. The behaviors and attributes associated with success make men more likable and women less likable.

Facebook COO Sheryl Sandberg cited the following study⁹⁴ in her TED Women audience.⁹⁵ Frank Flynn and Cameron Anderson gave their New York University students a case study of a successful Silicon Valley venture capitalist named Heidi Roizen. She was called Heidi for half the sample and Howard in the other half. Sandberg notes that the students felt Heidi was significantly less likable and worthy of being hired than Howard. Why? Students saw Heidi as more “selfish” than Howard.

This phenomenon is being referred to as the ‘likability problem.’ It is yet to be seen how new expressions of femininity will overcome this.

New spaces for community and activism

Women are leveraging the collective power of uniting online to effect political change. A number of female bloggers were important in inspiring others during the Arab Spring, in particular Lisa Ben Mhenni who was nominated for the Nobel Peace Prize.⁹⁶ In April 2012, the wives of the British and German ambassadors to the United Nations called on Asma al-Assad, Syria's first lady, in an online video, to stop her husband's campaign of bloodshed.⁹⁷



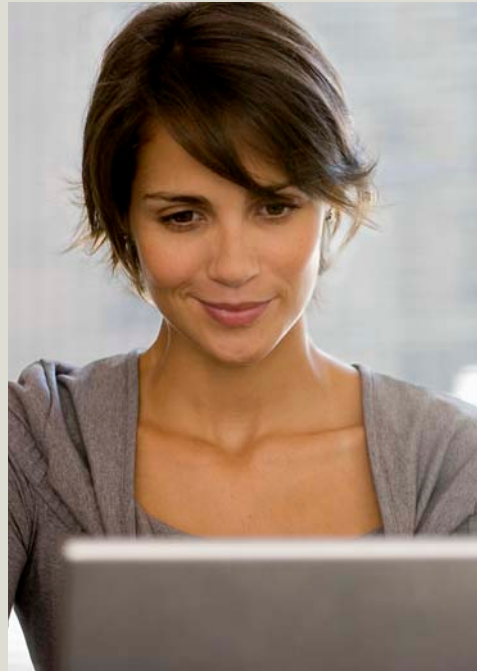
“Women are 86% more likely to start a discussion on a social network than men. Women are the ones posting, commenting, liking, sharing.”

Dayna Dion,
Cultural Strategy Director,
Ogilvy & Mather

Technology is providing more ways for women to build networks of support, trust and information. From Mommy Bloggers (such as Stephanie Nielsen and Jessica Gottlieb) to resource sites made by and for women (mizville.org, BlogHer, iVillage), the Internet abounds with forums for women all over the world to come together and share. The scope and power of such sites range from consumer to political. There's no doubt that women are the most effective users of the Internet for the purposes of communities of interest and activism.

Women are seeking more intimate networks that allow them to share information about themselves only with those they truly know and trust.⁹⁸ HelloGiggles is a site which

was established as a space where women can creatively connect in an entertaining and supportive environment—away from exposure to the negativity that often plagues other online discussion forums. Similarly, LuluVise was designed as a private space for women-only online conversation, using the Facebook network as a platform. What's more, the way that women behave online is markedly different from men. A recent study by Ogilvy & Mather of male and female tweeting observed that while men are more likely to tweet a critique or a statement of fact (i.e. a monologue or broadcast form of communication) women are more than three times as likely to ask a brand a question, start a conversation, or use Twitter as a platform for having a customer service enquiry answered. This desire to participate in a dialogue online is something that brands will increasingly wish to respond to.





What to expect in the future

1. Understanding multi-dimensionality

Expect successful brands to find ways to address women in their plural or multi-dimensional identities, rather than codified singular identities. Opportunity exists to do this much better.

Opportunity

Own the white space that currently exists between women's singular roles/identities.

2. Convergence of roles in the family

Expect the gradual convergence of roles in the family, from 'mother' and 'father' to 'parent'. Change here will be gradual, as women are still likely to shoulder the majority of the responsibility for caring functions in the family.

Opportunity: Develop products which include men in parenting (e.g. men's nappy changing bag).

3. New femininity

Expect the development of female identity away from male-gaze endorsed ideal of beauty, to real beauty and femininity focused on personal goals, internal fulfillment, competency and admiration for the

achievements of other women.

Opportunity

Respond to, reflect, support and shape a richer definition of femininity.

4. Men's mental health

Expect shifting patterns away from the traditional roles of men as breadwinner and protector of the family. This will be coupled with changes in workplace dynamics to acknowledge the value of a breadth of skills and qualities. In turn, we expect this to lead to a greater focus on men's mental health.

Opportunity

Broader opportunities will emerge to help shape ideals of male identities, as their traditional role are eroded.

5. Trading in time and energy

Greater focus on products and services offering more time, energy and balance. Rather than weighing up the financial or material value, female consumers will tend towards making choices based on greater balance.

Opportunity

Develop products and services which allow women to better manage their time and energy levels.

6. Channeling/Filtering conversations

Expect improved understanding of women's desire to engage in dialogue with brands. Greater transparency with online customer service and enquiries being handled publicly. Expect levels of access to such conversations being filtered by gender (e.g. facial recognition billboards), to allow more controlled circles of conversation.

Opportunity

Take a lead in developing spaces which offer the possibility of creating private, safe spaces for female conversation.



“There's definitely been an embrace - in policy documents and cultural texts - of using the word 'parent' rather than 'mothers' and 'fathers'.”

Dr Tracey Jensen,
Lecturer in Media
and Cultural Studies,
University of Newcastle

Dimension 4: Innovation



From: User
To: Inventor

Women have always found ways to use the products developed by companies for them, often adapting or repurposing those that did not serve their needs well. Greater access to finance and increasing presence of women in the fields of tech and design means that women are changing their relationship with products: from being the user, to being the inventor.

Women represent a growth market bigger than India and China combined,⁹⁹ and yet 71% of women feel that brands consider them only for beauty and cleaning products.¹⁰⁰ Manufacturers have been stuck in the rut of the 'pink it and shrink it' philosophy of female product development.

Markets with a relatively established balance between economic and social participation, see greater acknowledgement and understanding of the distinction between socially conditioned roles and biological differences between the genders. This will allow for different paths to emerge for innovation.

With socially conditioned roles converging in the workplace, in parenting, in expressions of identity, behavior and so on, there will be a greater blurring of the products and services for men and women. This may mean more gender neutral aesthetic designs, particularly in technology. More sophisticated acknowledgement of biological and physiological differences between men and women, will create the opportunity for a greater tailoring of products and services to biological and physiological differences in women's life stages.

The main influence of women as catalysts in innovation will be seen in three main spheres:

- Design innovation shaped for women
- Innovation shaped by women
- Innovation for social good

In the following pages we look at specific examples of innovation that have set out to address these areas.



“An interesting trend that’s occurring is that women are more engaged in open

hardware and open making, for example 3D printers. I’m seeing more and more women getting involved in those spaces, and hopefully that’ll be a gateway for them into the software world.”

Kat Braybrooke, Community Coordinator, Open Knowledge Foundation

Design innovation shaped for women

Leader brands will make greater efforts to develop products for women which perform in terms of function and not just aesthetic, and which respond to the particular biological and physiological needs of women.



Photo source: www.fiat.co.uk

Fiat 500 1.2 Pop

Fiat 500, recently redesigned their famous Fiat 500 with the needs of women in mind - resulting in the 1.2 Pop model. In response to research suggesting that up to 40% of women sit 10 inches closer to the steering wheel,¹⁰¹ Fiat redesigned the driving position, moved the accelerator position to accommodate heels, and even developed a smoother high-grip gearstick positioned to avoid nail-breaks.



Photo source: www.trekbikes.com

Trek Women-specific Design

Trek's unique design approach sees bikes as complete systems designed specifically with women in mind to maximize riding comfort and confidence. Rather than adapting men's bikes, Trek's bikes are designed with women's ergonomics in mind from the start. Their WSD (Women Specific Design) features include ergonomic saddles shaped to fit, handlebars that match women's unique shoulder width and frames designed for the right reach and position.¹⁰²



Photo source: www.nike.com

Nike Pro Hyperwarm Hoodie

Nike has continued developing product designs that are fit for purpose with their latest range of women's running hoodies. As well as an improved body-hugging fit, Nike has included a unique ponytail hole in the hood to benefit longer-haired runners who want to keep their hair in place to maximize their performance.



Photo source: www.nationalguard.mil

US Military Armor

In 2009, the US military began research into developing new body armor for female soldiers, after complaints from female soldiers saying that it caused discomfort and could even hinder female soldiers' effectiveness on the battlefield. New designs have accounted for women's narrower shoulders, shorter torso length and chest contours, allowing for better fit to female shape, less discomfort during wear, and improved mobility.¹⁰³



“Sanitation could see some significant improvements as a result of more women being involved in its design. Particularly in developing countries such as India where there's huge sanitation problems; women have no privacy or dignity in this area at the moment.”

Anab Jain, Designer, Futurist and Founder of Superflux



Innovation shaped by women

With more women entering the fields of engineering, design and technology, and the emergence of crowd-sourcing funding models, women will continue to invent solutions to meet their unmet needs.



Photo source: www.snapette.com

Snapette

The nature of shopping is changing and is no longer constrained the physical high street. Snapette is a location-based app developed by female co-founders Sarah Paiji and Jinhee Kim, to respond to a demand to streamline the shopping experience through social sharing. Launched in 2011, it is a social network for women to share images of fashion items which are searchable via GPS, so women can discover the best finds near them. It is a great example of this growing synergy between online and offline shopping experiences.

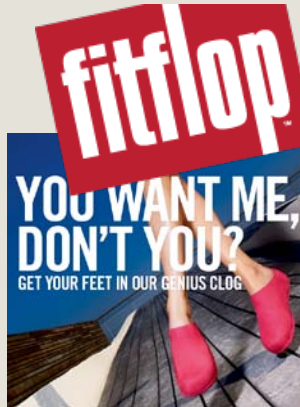


Photo source: www.fitflop.co.uk

Fitflop

Launched in 2007 by female entrepreneur Marcia Kilgore, Fitflop was based on the insight that for many women finding the time for structured exercise is impossible, and that the only way they would fit it into a busy day is to make it a *part of* the busy day: the part when they get from A to B. Fitflop's patented 'shock absorber' style midsoles that cushion the foot, result in toned legs and better posture.



Photo source: www.renttherunway.com/about

Rent the Runway

Founded by Jennifer Hyman and Jennifer Carter Fleiss, Rent the Runway is an online high-end design dress and accessories rental site with 2.5 million members. It was developed in response to a need among women to have access to impressive eveningwear for occasions without the need to buy a dress they might wear once. The rental model had never been developed on this scale before for designer clothes and is proving a huge success.

Solving for social good

More women working in innovation and design can mean more solutions for social good. There are already some very powerful examples of innovations designed by women to improve lives by educating women on important personal issues.



Photo source: Virago



Photo source: www.ushahidi.com



Photo source: www.ihollaback.org

Gaming concepts for education in the developing world

A best-selling book, *Half The Sky*, by Nick Kristof and Sheryl WuDunn, is being turned into a revolutionary gaming concept, targeting women in the developing world. Three different mobile games have been developed to teach women through gaming important entrepreneurial, health and business skills. One of the games, *Nine Minutes*, teaches girls about the pregnancy cycle and maternal health. The non-profit partner who curated the app content, Cedpa, will use it to educate pregnant women in health clinics. The games, developed with funding from USAID and created through partnerships with local non-profits, will be free to download through numerous app stores and will launch in Kenya, Tanzania and India.¹⁰⁴

Ushahidi

Ushahidi, co-founded by Juliana Rotich and Ory Okolloh, is a non-profit software company that develops free and open source software for information collection, visualization and interactive mapping. Its technology, which uses the concept of crowdsourcing for social activism and public accountability, was originally conceived in the aftermath of Kenya's disputed 2007 presidential election, to collect and map eyewitness reports of violence. These were sent in by email and text message and placed on a Google map. This technology has since been used to report and identify areas in need of immediate aid in the aftermath of major national disasters such as the 2010 earthquakes in Haiti and Chile.

Hollaback

Another example is Hollaback, co-founded by Emily May with \$15,000 raised through the crowdfunding site Kickstarter. Hollaback is a global network that encourages women to share their experiences of being harassed on the street, including sending pictures and locations of where it happened and who did it, to raise awareness, provide support and work together to address this issue.¹⁰⁵



What to expect in the future

1. Form and function (rather than 'pinkification')

Expect a move away from a purely aesthetic understanding of adapting existing products for female audiences. Greater integration of design and engineering, to produce solutions which truly respond to the types of functionality and interfaces that women engage with. This means technology as a seamless enabler, a means to another end rather than an end in itself.

Opportunity

Develop products which are tailored in terms of functionality rather than just aesthetics.

2. Body matters (physiological and biological needs-based innovation)

Expect a greater acknowledgement of the biological and physiological differences between men and women, and product design which accounts ergonomically for these differences. Expect a mainstreaming of some aspects of personal care that have been in the specialist/'pharma' space, with competitive brand offerings (e.g. Tena/Poise).

This will likely lead to a greater acknowledgment of the distinctive characteristics of women's various life stages, e.g. mental well-being around childbirth, with greater openness around pre- and post-natal depression. Expect less sugar coating of biological realities in the drive for greater authenticity, for example, Sure Maximum Protection's unapologetic admission of women's physiological needs: "And since strong women sweat, we've created an antiperspirant that's different."

Opportunity

Develop more products and services which support transitional changes for women, such as puberty and the menopause.

3. Research developments

Expect research methods to support their clients in identifying emotional, physiological and biological needs-based insights.

Opportunity

Utilize research which maps emotional phases in a purchase journey. Visual cues can be refined for greater insight into women's (online and offline) decision-making patterns and behaviors.

4. Identifying 'hacked' solutions

Expect brands to get smarter at identifying the opportunities where women are using existing tools in an additive or hacked form to better meet their needs.

Opportunity

Develop products that cater for an active need which remains unmet.

5. New women innovators in tech

Expect the emergence of a generation of women who are trained in STEM disciplines, but bring a new vision to the design of software, operating systems and digital interfaces.

Opportunity

To view this emerging group of women designers and engineers as a new source of innovation and inspiration for technology.

6. Solving for social good

Expect a growth in innovations/platforms/services which meet a social need or solve problems for social good. These are likely to be driven by women, or to engage with women, who have a greater interest in social and environmental issues. Crowd-sourcing will be a big part of how these are

funded, but will also create large audiences behind a common cause.

Opportunity

Use evidence of a groundswell of interest in an issue, and collaborate with other brands in supporting or funding it.

“Women are going to come up with the best ideas for women, who are driving our economy.”

Carley Roney, Co-founder of the XO Company, a publicly traded media company valued at \$300 million ¹⁰⁶



Conclusion

Leading organizations and brands of the future will find new sources of growth through better understanding this growing group of consumers; women who have spending power, and are shaping the future of society through their actions and choices.

Looking at women through the lens of the four dimensions of change highlights the fact that changes that occur for women have a marked impact on the rest of society and on the economy. Looking back at our Opportunity Tension Framework we are reminded of how diverse women's experiences are both between and within markets. The pattern of development may be different across the three clusters, but one characteristic permeates them all; that economic development for women always happens at a greater pace than the pace of change in their social rights and participation. Many of the opportunities for businesses and brands arise from this tension between economic empowerment and social empowerment.



Lagging markets

In the 'lagging' markets (where women have below average economic participation and below average social participation rights) there are opportunities for businesses and brands to focus on solutions created by women themselves for existing needs, and to provide attainable products to answer them. This includes using mobile technology to support learning and access schemes, which in turn allow women to become more active and empowered consumers. Brands can also partner with aid agencies to champion women as the key to reducing poverty and increasing national GDP.



Ones to watch

In 'ones to watch' markets (where women have above average economic participation and below average rights and opportunities) businesses and brands should be focusing on categories which have previously been male dominated, where women are starting to become important consumers (e.g. technology, automobile, alcohol). Women's role as 'gatekeeper' to a broader circle of consumers will be key in these markets as more women become economically active. Brands will have an important role to play in helping to resolve the tension between tradition and modernity – to support women in maintaining some of the conventions they

“Many of the opportunities for businesses and brands arise from the tension between economic empowerment and social empowerment.”

want to preserve while still making progress. These markets are also likely to be a source of female talent and skills in previously male dominated industries.

Closing the gap

In markets which are 'closing the gap' (where there is a relative established balance between women's economic participation and their social participation rights) opportunities for business and brands exist in emerging new life stages, and in being sensitive to blurring gender roles whilst acknowledging the difference in physiological needs between men and women. Developing flexible working patterns will be important to retain female talent. Companies will be expected to respond to the demand from women for a greater synergy between online and offline shopping experiences. There will be an important role to play for brands in exploring new ideals of femininity (and masculinity).



Getting it right with women

By analyzing the shifts we can expect to see in the four key dimensions of women's lives, we can draw some conclusions about how leading organizations and brands will behave in the future.

Leading organizations will be...



Dimension 1: Decision-making

- **Welcoming newcomers:** Seeking out opportunities in previously male-dominated categories, both in established and emerging markets – and finding ways to appeal to women as newcomers to the category.
- **Using the gatekeeper:** Leveraging women's role as purchaser on behalf of others to access other consumers in her sphere of influence.
- **Creating seamless interactions:** Working to create greater synergy between online and offline brand and shopping experiences.
- **Helping women have their way, while playing by the rules:** Finding ways to resolve the tension between tradition and modernity for female consumers.



Dimension 2: Workplace & economy

- **Making flexible working mainstream:** Putting workplace policies in place, which make it possible for both mothers and fathers to manage parenthood in a more balanced fashion, and making it a default part of work culture.
- **Hanging on to talented women:** Developing systems to keep women motivated and rewarded and where necessary taking controversial yet proven methods such as setting quotas on leadership positions.
- **Revaluating the metrics:** Developing evaluation and promotion systems which reduce gender bias on the promotions ladder, and valuing the different socially conditioned qualities which women bring to the workplace.
- **Finding and funding hidden gems:** Seeking out and investing in female entrepreneurs and innovators.



Dimension 3: Communication & Identity

- **Championing new ideals of femininity:** Taking the lead on shaping new ideals of female identity which are more aligned with women's real ideals ("women want to be her, because other women admire her").
- **Becoming a part of their inner worlds:** Giving women a reason to make brands a part of their private spaces for conversation in the online world.
- **Gaming for good:** Leveraging women's use of social gaming to develop new ways for them to play, learn and interact.
- **Reinventing masculinity:** Being smart about how men are portrayed in communications to avoid alienating women, and finding new identities for men as their traditional roles are eroded.



Dimension 4: Innovation

■ **Bridging the needs gap:**

Identifying places where women are creating 'hacked' solutions for their needs and developing products and services to answer them.

■ **Being body conscious in design:**

Adapting and developing designs to account for physiological differences between men and women.

■ **Avoiding pinking:**

Tailoring functionality and not just aesthetics.

■ **Inventing for new life stages:**

Seeking out opportunities for new product development arising from new demands and changes in women's roles and new life stages emerging from shifting lifestyle patterns.

How The Futures Company can help

How do I grow my category in a changing landscape of women's roles and needs?

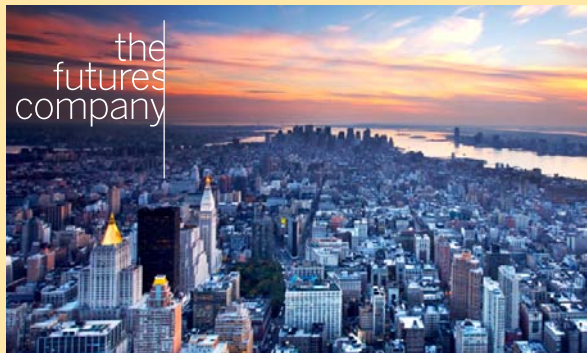
By leveraging foresight and futures techniques, we have helped organizations and brands identify the high level strategic opportunities arising from consumers' changing needs and the macro trends roles shaping the future.

How do I ensure my innovation is going to connect better with this changing group of consumers than my competitors?

We've helped major brands and organizations develop innovations anchored in strategic foresight and key human insight to unlock disruptive opportunities and to deliver a future-proofed roadmap for growth.

How do I improve my organizational understanding of this critical group and prepare for changes which may affect my future growth?

We've developed powerful foundational insight for brands and organizations that has unearthed new growth opportunities for their business



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The Futures Company and Thought Leadership

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www.thefuturescompany.com/free-thinking/

For further information on our free thinking series, please contact karen.kidson@thefuturescompany.com



“Smart organizations—
and those that succeed
over the next decade
and beyond—will
understand that the 21st
century is the ‘Women’s
Century.’ Women’s
economic empowerment
and entrepreneurial
growth will drive the
world’s economy. It’s
not a matter of ‘if’ — but
rather a matter of ‘to
what heights’.”

Mukhtar Kent, Chairman of the Board & CEO, Coca-Cola¹⁰⁷

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About The Futures Company

The Futures Company is a leading global strategic insight and innovation consultancy. The Futures Company unlocks new sources of growth for clients through its unparalleled global expertise in foresight and futures.

The Futures Company is a Kantar company within WPP with teams in Europe, North America, Latin America and Asia.

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Will Galgey, Global CEO
T: +44 (0)20 7955 1818
will.galgey@thefuturescompany.com
www.thefuturescompany.com

www.twitter.com/futuresco
<http://www.linkedin.com/company/the-futures-company>