



Single Sway

The Driving Force of New Female Consumerism

frank.
about women

The female-forward brain trust of **mu//en•nc**

If you think marketing to women is all about moms, think again. The landscape is changing dramatically, and single women are leading the way. Experiencing unprecedented gains in power — politically, socially, culturally and economically — single women are no longer pitiable outsiders. They're shaping our very world and acting as the aspirational trendsetters for women of all stripes. Inside every woman is the spirit of the single girl, whether rooted in a married woman's fond memories of her more carefree years or in a mother's desire to reclaim some independence as her kids grow older. Oh, and by the way, single adults represent \$1.9 trillion in spending power for American society.¹ Meanwhile, women as a whole are expected to control two-thirds of consumer wealth within the next decade.² So listen up.

For years, marketers have broadly lumped women into two buckets: moms and singles. A casual survey of the marketing and advertising landscape indicates that by “mom,” we (the industry) often mean the minivan-driving, soccer-watching, laundry-sorting working mother and supportive wife. You know the one — with a large, sunny home, two kids and a sloppy but lovable husband.

There’s nothing she can’t handle with a shake of her head and some frozen appetizers or a “cleaning made easy” household product;

her sense of style is strikingly satirized by Saturday Night Live’s “mom jeans” ad.

At the other end of the spectrum, you’ve got the helpless, desperate singles, defined primarily by their willingness to do whatever it takes, and ignore any red flag, in the quest to find “Mr. Right.” Even if it means, as depicted in a recent Broadview Home Security ad, overlooking the fact that a strange man has showed up at your intimate get-together because, who cares — he’s cute! As any woman could tell you, none of these portrayals come close to capturing her values, her behaviors or her roles and responsibilities.

Today, these two wildly oversimplified depictions of women are even more inaccurate than ever. Pick up the papers, or just tune into the recent political

debates, and you might think that the “American Family” is on the verge of extinction, and the very fabric of our society has become unglued, all thanks to uppity women who’ve gone rogue. The truth is, American culture is undergoing a seismic shift: The modern “nuclear family” is on the wane, and women who’ve previously been limited to roles of moms, hope-to-be moms and spinsters now have an endless array of paths and identities to choose from.

As marketers, we need to understand the dynamics of this change and adjust to connect with consumers living in this new reality.

Five Trends That Are Changing the Face of America

So the evidence clearly shows that women are exceeding men in higher education, climbing up the career ladder across a range of professions, having children later, if at all, and substantially postponing (or even opting out of) marriage. How are all these things connected, and what do they mean for marketers? A closer look shows that a handful of trends are driving these numbers.

The New Big Spenders

Forget the “DINKs” of yesteryear. Today’s hottest new segment are the SWANKs — Single Women, Affluent, No Kids — a substantial and growing group of American women. Whether childless by choice or circumstance, these women have high disposable incomes and are among the most well-informed, highly engaged consumers. A subset group, called PANKs (“Professional Aunt, No Kids”),³ are richly involved with the children in their lives, including biological nieces and nephews and their “chosen family” nieces and nephews (the kids of their closest friends). SWANKs are among the fastest-growing segments in a variety of categories, from home ownership and personal finance to adventure travel and luxury goods.

Women's wages increased 44% in the period 1970–2007, compared to only 6% in the period for men⁴

In 2010, single, childless twenty-something women living in cities earned 8% more than their male counterparts⁵

One in 4 new home buyers is a single woman⁶



Reshuffling the Dating Deck

Even as women see their professional and economic success rising, they may look around and wonder, “Where *have* all the cowboys gone?” Indeed, as men’s relative earning potential decreases, a woman’s economic motivation for finding a spouse to fully support her, or even contribute to a net gain in her economic wellness, falls away. And women are facing a serious shortage of romantic equals. Dubbed the “Dating Gap” by Kate Bolick in her must-read “All the Single Ladies” in *The Atlantic*, this disruption in the relationship market dramatically narrows a heterosexual woman’s options. Consequently, even women predisposed to “find a man and settle down” are discovering that this path is by no means a certainty.⁷



Less than 13% of single adults
are actively looking for a relationship⁸

Women earn 60% of bachelor's and master's degrees⁹

34% of unmarried adults want to get married¹⁰

Skipping the Vows

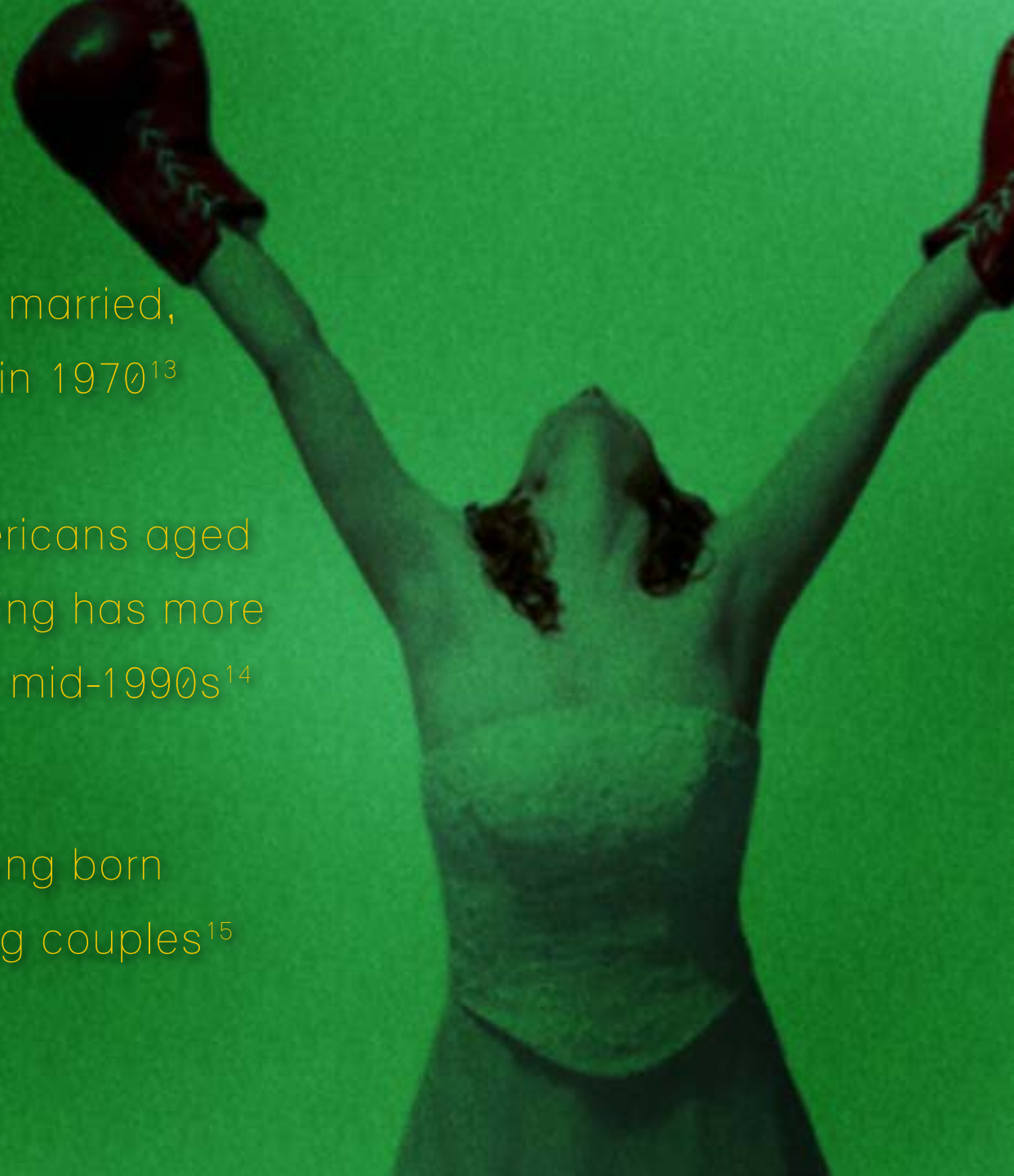
Even for the happily partnered, marriage is no longer a priority. Cohabiting adults are enjoying the rewards of nonmarital freedom while gaining many benefits long associated with marriage.

A recent study¹⁹ found that unmarried couples living together are just as likely to experience “marital” benefits: a spike in well-being, higher levels of happiness and fewer depressive symptoms in the “honeymoon” period.¹¹ But while married couples enjoy a longer-lasting benefit associated with health (likely through shared health care benefits and other legal perks), cohabiting couples achieve sustained happiness and self-esteem, likely arising from the greater flexibility, autonomy and personal growth they experience by avoiding the “obligations” of marriage.¹²

51% of U.S. adults are married,
compared to 72% in 1970¹³

The percentage of Americans aged
30–44 who are cohabiting has more
than doubled since the mid-1990s¹⁴

One in 4 children is being born
to unmarried, cohabiting couples¹⁵



Sole Habitation

Alongside the growing movement toward cohabitation is a surge in single-person households as more and more American adults embrace the independence that comes with living alone. In fact, 33 million American adults live alone, compared with just 4 million in 1950.¹⁶ And more than half of them are women.¹⁷ A combination of vibrant urban environments, robust social media connectivity and freedom from familial obligations has conspired to make these singles the most socially engaged, outwardly active adults in our society — far from the reclusive hermits or pitiable spinsters long associated with living alone.

33 million American adults live alone¹⁸

Women make up 55%
of one-person households¹⁹

28% of American households
are single-person²⁰



Swingles Shaping the Nation

Politicians — the shrewdest marketers in our highly politicized culture — are spotting the opportunity that single women represent today. As new swing voters, these “Swingles” represent one of the nation’s largest voting blocs, comprising 55 million women, growing by 1 million voters a year and making up a quarter of voters today.²¹ As pollsters and policymakers pay increasing attention to this diverse audience and its needs, watch for our national conversation and our culture to skew increasingly female.

55 million single-women voters today²²

Swingles = 25% of voters in 2012²³

22% of potential swingles are
not registered to vote²⁴ ... yet



Six Single Segments Every Marketer Should Know

With so many dynamics shifting in a short period and unprecedented choices available to women today, a multitude of identities and roles have emerged. What's important is that these identities can be true regardless of sexual orientation, race or even religion, though key differences emerge for women at different ends of the economic spectrum. As marketers, we ignore these groups at our peril.

Savvy SWANK

1 Think of these women as post-Sex in the City. Instead of investing all their energy into the epic quest for finding a mate, they own their singlehood. Though most remain open to committed relationships — a fact evidenced by the record growth of online dating in recent years²⁵ — the last thing they're prepared to do is “settle.” They're highly educated, have higher income, live alone and because they're childless, they've got substantial disposable income. They represent a growing segment across a variety of spending categories — from health and beauty to travel and leisure and, yes, even “family-oriented” purchases for nieces, nephews and other kids in their lives.

Struggling Solos

2 At the other end of the economic spectrum, women who are less educated and have lower incomes are faced with greater challenges. While the idea of a partner for financial support may seem more appealing — even necessary — these women are also less likely to find mates of equal or higher education and earning potential. In fact, while highly educated or rich women are seeing a slight increase in marriage rates, women in the bottom half of earners are experiencing a stunning 25% decline in marriage rates.²⁶ So they're taking care of themselves and developing close-knit relationships with their “chosen family” to support and encourage each other along the way. For this audience, the value equation is key, reflecting a desire not only to save money but also to make room in their budgets for experiencing all that the single life has to offer.

Semi-Singles

3 Though romantically involved and perhaps cohabiting with a long-term partner, these women remain unmarried and financially independent. They're making many decisions together — especially purchases like homes, cars and other big-ticket expenditures — but they remain free to spend their disposable income as they choose, from independent travel excursions with their friends, to updating their wardrobes, to being the first to have the latest personal technology.

Modern Matriarchs

4 More women than ever are raising their kid(s) on their own, due in part to a growing number of women actively choosing this path in their 30s and 40s.²⁷ Women in this incredibly diverse group — representing all ages and races, high and low income, gay and straight, happenstance and carefully planned — often turn to a robust network of close friends and family for emotional, logistical and even financial support. Given these wide variables, this isn't a group that marketers should marginalize, patronize or paint with too broad a brush. But regardless of economic status, one of the most precious commodities for single mothers everywhere remains time. As marketers, if we're not offering ways to make life easier and the day longer for these women, they are probably not hearing us.

Neo-Nuclears

5 With today's shifting family dynamics, many women find themselves part of a fluid household. They may be unmarried or remarried, they'll have kids in the house who are their own, are their spouse's/partner's, and/or are shared with their spouse/partner, and these kids may come and go as part of shared custody arrangements. Women (and men) living in these environments often experience a duality of identities, with part of their lives spent in more traditional parenting roles, and part of their lives spent childless — often leaving them with more time and money to spend on themselves than in the traditional arrangements of the past.

Single Wives

6 For a growing number of married women, the recent "mancession" has created a dual role for them — that of both primary breadwinner and "chief operating officer" of their households. Because while many men are becoming more involved with household duties, some are still struggling to embrace the domestic roles traditionally occupied by women. Indeed, even as women outnumber men in professional and managerial roles, 91% of women claim primary responsibility for running their households.²⁸ From getting their children to appointments and events to ensuring that the house is kept up, women are learning that their job is literally never done. Finding a comfort zone in this new reality is challenging, to say the least. Women are looking for ways to outsource a growing list of responsibilities and reward themselves for their accomplishments, while men are looking for new ways to express themselves and demonstrate value in the new family dynamic.

Identifying and Understanding the Implications

Above all else, these shifting cultural dynamics and emerging segments represent a huge opportunity for marketers willing to shed their restrictive notions of what today's woman looks like. To ensure that you're developing a strategically sound, positive communications strategy, keep the following questions in mind:

Which women are we talking to?

We've got to go way beyond demographics when we think about women today. It's no longer a question of married versus single, twenty-something versus Baby Boomer, mother versus child-free. What matters is the life stage she's in, the roles and responsibilities she's adopting and the priorities she's juggling in her everyday life. As marketers, we need to be mindful of the multitude of roles and identities every woman carries with her, including those women who happen to be mothers (young or old, married or single, gay or straight). In a recent study conducted by Womenkind, women overwhelmingly described themselves as independent (83.8%) and multitaskers (79.7%).²⁹ So it's not surprising that they reacted warmly to advertising showcasing women as capable, independent multitaskers, like Kelly Ripa in Rykă's "Run with Kelly and Rykă" campaign.

Are we showing her in a relatable and positive role?

There isn't a group of women out there who wants to feel pitied or patronized, so be careful about showing unmarried women as existing solely for the purpose of finding a man. Nor does any woman want to be reduced to a single, stifling image, so it's important to recognize that mothers are far more than minivan drivers, and many have never attended a soccer match. The recent cautionary tale of a chinos brand with a laundry tag instructing men to "Give it to your woman, it's her job!" is a reminder that in today's hyperconnected world, it's more important than ever to keep these stereotypes in mind as much when talking directly to men as when talking directly to women.

Is our brand positioning meaningful to her today?

As her life stages evolve, so do her relationships and attitudes — not only in romance, friendship, family and profession but also in the brands that she identifies with. Liquid-Plumr’s recent Double Impact campaign embraced women’s growing prominence in the purchase of household repair products and gave women credit for having a sense of humor and an ability to get things done. Though it sparked some dissent from the One Million Moms group (the same conservative organization that unsuccessfully called for boycotts of JCPenney for its relationship with Ellen DeGeneres), ultimately the ad drew plenty of favorable ratings from men and women for its entertaining spin on a less-than-sexy category.

Is our brand offering a promise or benefit that is relevant to her today?

Her needs are as many and varied as the roles she takes on throughout her day, year and lifetime. Which need are you meeting, and why should she care? Poise is reaching out to younger, socially active women experiencing bladder leakage — a sharp departure in a category known for septuagenarian Matlock enthusiasts, and one that both demystifies and destigmatizes a problem younger women have long been suffering silently.

Where, when and how are we connecting with her?

In today's world of nonstop connectivity and seemingly endless means of communication, it's more important than ever to be talking to her about the right thing at the right time and in the right medium. Weight Watchers, long a brand that relied on in-person relationships for its business model, has recognized how integral the mobile experience is to weight loss for the modern man and woman, building not only an integrated communications strategy but also an entire online product to meet these digitally engaged consumers where they live.

How are we depicting or addressing men today?

All these implications need to be taken into consideration when thinking about men today, as their world is clearly shifting. But don't be too quick to cast judgment — because the men in these relationships take umbrage at marketers who mock their ability or willingness to evolve in their roles. Just ask Huggies, which recently was forced to pull an ad touting its diapers as “dad-proof,” a promise that was as insulting to the men who take pride in their role as dads as it was to the women who coparent with them.

Suggested Reading and Footnotes

When it comes to keeping up with trends about women, relationships and the world at large, here is a sample of what we love to follow:

[The Atlantic](#), especially when it features great writers like Kate Bolick and Hanna Rosin

[Salon.com](#), especially Mary Elizabeth Williams, Tracy Clark-Flory and Cary Tennis

[Slate.com](#), especially its XX Factor and contributions from Katie Roiphe

[Jezebel.com](#)

[PewSocialTrends.com](#)

[Daily Candy](#)

[@lenadunham](#)

[@feministhulk](#)

[@dooce](#)

[NecoleBitchie.com](#)

¹ Eric Klinenberg, Solo Nation: American consumers stay single, <http://finance.fortune.cnn.com/2012/01/25/eric-klinenberg-going-solo> • ² Jill Krasny, Business Insider INFOGRAPHIC: Women Control the Money in America, February 17, 2012 <http://www.businessinsider.com/infographic-women-control-the-money-in-america-2012-2#ixzz1mFTybb1> • ³ Melanie Nofkin, www.sawyauntie.com
^{4,5} Kate Bolick, All the Single Ladies, The Atlantic November 2011 • ⁶ Housingwire.com: <http://www.housingwire.com/news/single-women-bought-first-homes-twice-rate-men-2009>
⁷ Klinenberg • ⁸ Sharon Jayson, USA Today, Many singles looking for love, but not marriage, Feb. 2, 2012 • ⁹ Bolick • ¹⁰ Sharon Jayson, USA Today, Many singles looking for love, but not marriage, Feb. 2, 2012 • ¹¹ Journal of Marriage and Family 74 (February 2012) Reexamining the Case for Marriage: Union Formation and Changes in Well-Being • ¹² Hanna Rosin, Rise of the Single-Woman Voter, Mar 13, 2012, Slate, http://www.slate.com/articles/double_x/doublex/2012/03/single_women_are_the_new_swing_voters_but_which_way_do_they_lean_.html
¹³ Pew Research Center Social & Demographic Trends, Barely Half of U.S. Adults Are Married — A Record Low, December 14, 2011 • ¹⁴ Pew Research Center Social and Demographic Trends, The Decline of Marriage and Rise of New Families, 11.18.10 • ¹⁵ USA Today: <http://www.usatoday.com/news/health/wellness/story/2012-04-10/CDC-marriage-cohabitation-children/54186600/1>
¹⁶ Time Magazine: <http://www.time.com/time/magazine/article/0,9171,2108055,00.html> • ¹⁷ Klinenberg • ¹⁸ Time Magazine • ¹⁹ Klinenberg • ²⁰ Time Magazine • ^{21,22} Rosin
^{23,24} Power of Unmarried Women, Lake Research Partners • ²⁵ Tim Donnelly, Inc.Com: Best Industries for Starting a Business 2011: Online Dating and Matchmaking, Apr 11, 2011, <http://www.inc.com/best-industries-2011/online-dating-and-matchmaking.htm> • ²⁶ Derek Thompson, The Death (and Life) of Marriage in America, The Atlantic, February 2012
²⁷ Pew Research Center Social and Demographic Trends, The New Demography of American Motherhood, May 6, 2011 • ²⁸ Boston Consulting Group: Women Want More (2009), summary available at <http://www.womenwantmorethebook.com/documents/file21481.pdf> • ²⁹ Womenkind LLC, How She Roles: How Understanding a Woman's Roles, Identities, and Priorities Improves Messaging, July 2011

If you can't tell from everything you've just read, we're looking at a consumer landscape that won't stand still for a moment. So whether you're updating a traditionally female-facing brand or expanding your audience to include women as a target for the first time, be sure you think carefully about how you want to communicate, and to whom. And by all means, give us a call — we're happy to help!

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