



Women of Tomorrow:

A Study of Women Around the World

June 2011



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When it comes to spending decisions, women are in control!

Women control the majority of purchasing decisions in a household and their influence is growing. Women across the world are expanding beyond traditional roles to influence decisions in the home, in business and in politics. Marketers have a massive opportunity to better connect women with the products they buy and the media technologies they use to make a positive impact both in their lives and in the bottom line.

So what traditional and new media influencers are most successful in driving women's purchase decisions? Do women in developed countries think and act differently than women in emerging countries? What concerns do women have now and what do they expect for future generations? Do traditional roles still exist or do men and women share responsibilities equally? Importantly, how can marketers not only reach women more effectively, but how can they create messaging that better speaks to the sentiments and emotions that drive and empower women?

To answer these questions, Nielsen surveyed women across generations and from all corners of both developed and emerging economies. Reaching out to 21 countries representing 60 percent of the world's population and 78 percent of GDP, this study provides insight into how current and future generations of female consumers shop and use media differently. The findings are both enlightening and surprising. One universal truth prevails: women everywhere believe their roles are changing and they are changing for the better.

Key Findings:

- **90% of women believe their role is changing for the better.** Eighty percent of women in developed economies believe the role of women is changing and of those, 90 percent believe it will change for the better in all matters from gender equality to politics to opportunities in the workplace.
- **A vast horizon of opportunities, but a plateau of hope in developed economies.** The aspirations for future generations of women in emerging countries are bright, but women in developed countries believe that the same opportunities —not more —will be available to their daughters.
- **Increasingly empowered, increasingly stressed.** Women everywhere are pressured for time, have little time to relax and feel stressed/overworked, but women in emerging countries feel the strain even more than women in developed economies.
- **When it comes to life's decisions, women want to share responsibility.** A desire for male/female shared responsibilities in all matters from childcare to car purchases is echoed everywhere, but breaking down some barriers in emerging countries continues.
- **Across generations women are alike in many ways, but they are also unique.** From daughters to mothers to grandmothers, there are some commonalities across watch and buy behaviors, but it's the unique differences that savvy marketers need to understand.
- **Social media has become an indispensable tool.** Women are expanding beyond their careers and homes to influence decisions in both business and politics to benefit others. And they are leveraging social media platforms to solve problems, ask questions and build communities.
- **Only 10% of women are highly influenced by web ads with social context.** Technologies that appeal to women's innate nature to engage, connect and multi-task are life-changers,but social media advertising has significant room to grow.
- **She trusts those she knows.** When it comes to advertising, women trust recommendations from people she knows above all other forms. She is most reticent to trust text ads on mobile phones. And if she trusts a company, it means a lot.
- **TV is the preferred source to get information about new products and services.** Women rely on television to get information about products, but as the landscape continues to fragment, complementary and integrated marketing plans are vital.
- **Across 95% of countries, quality is the #1 driver of brand loyalty.** The number one driver of brand loyalty across 17 factors in 20 of 21 countries is quality. "Lowest price" doesn't even make the top three criteria among these countries.

EMERGING MARKETS		DEVELOPED MARKETS	
Brazil	Nigeria	Australia	Japan
China	Russia	Canada	South Korea
India	South Africa	France	Spain
Malaysia	Thailand	Germany	Sweden
Mexico	Turkey	Italy	United Kingdom
			United States

90% of women believe their role is changing for the better.

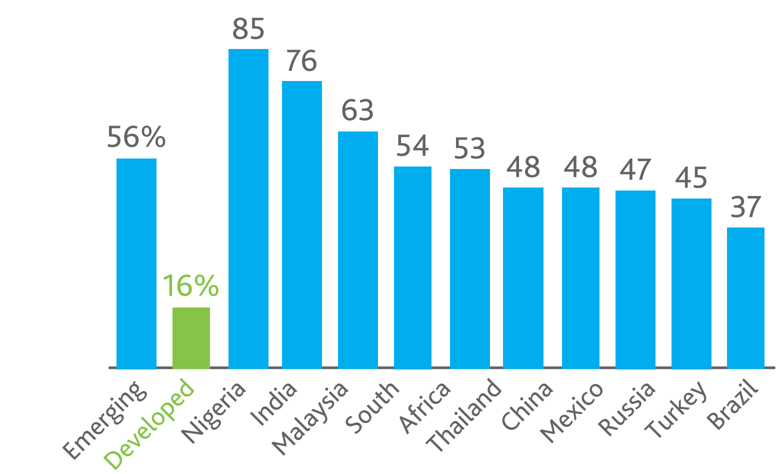
Better access to education, improved career opportunities and higher pay scales in both developed and emerging economies are paving the way for a rise in women's economic power. And that sentiment is clearly evident in Nielsen's research, as nearly 80 percent of women surveyed in developed countries believe the role of women is changing, and of those, 90 percent believe it is changing for the better. In emerging countries, the future is even brighter.

Education and access to technology are fueling tomorrow's optimism as women around the world know that one vital way to a better life is through education. In developed economies, women's access to higher education is considered an established standard, while in emerging economies, attending college is often a luxury for women and the aspiration is much higher.

The value of that privilege is evidenced in the study, as 56 percent of women in emerging countries say they plan to allocate additional income for their children's education versus just 16 percent of women in developed countries. Women in Nigeria, India and Malaysia placed the most importance in saving for their children's education —a choice that ranked in the top three out of 25 different options for how they plan to allocate their additional salary in the next five years.

Education for children is a top priority for women in emerging countries

In which ways do you expect to allocate any additional money you have earned or expect to earn over the next five years?



Source: Nielsen Women of Tomorrow Study 2011.

Invest in her Tomorrow

Invest in initiatives that further educational/advancement opportunities by connecting your brands/products with associations that align with her beliefs and aspirations.

A horizon of opportunities, but a plateau of hope in developed economies.

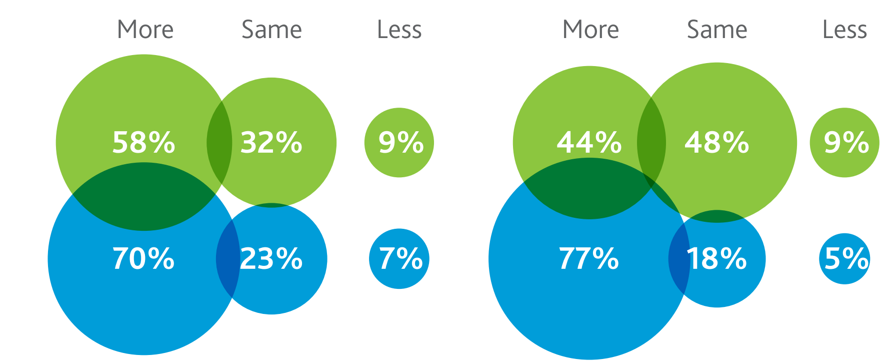
Across both developed and emerging countries, the majority of women today believe they have more opportunities than their mothers did for everything from achieving personal financial stability and enjoying better health to having more career opportunities and greater access to technology. And while that level of attainment will grow and develop even further for women and their daughters in emerging countries, a plateau of hope is emerging among the future generations for women in developed countries.

Across 18 dimensions analyzed, more than 77 percent of women in emerging countries believe the future will be brighter for their daughters. The areas where improvement will be the greatest are technology (84%), education (83%), travel (82%), financial stability (81%), purchasing power (81%) and careers (80%). Women in Turkey (92%), Nigeria (89%) and Malaysia (89%) were the most optimistic.

In contrast, the majority of women in developed countries (48%) believe that the same opportunities —not more —will be available to their daughters (with the exception of access to technology, where three-quarters believe more opportunities will be available). And the reality of today's high cost of living with little spare income is apparent as almost one-third (29%) believe that their daughters will be less likely to retire when they choose to compared to today's standards.

Marketers need to recognize that while women of tomorrow are optimistic, they are also concerned about their home, children and the future —both at the micro (immediate family) and macro (environment, politics) levels.

Opportunities compared to your mother at your age and for your daughter in the future



Source: Nielsen Women of Tomorrow Study 2011.

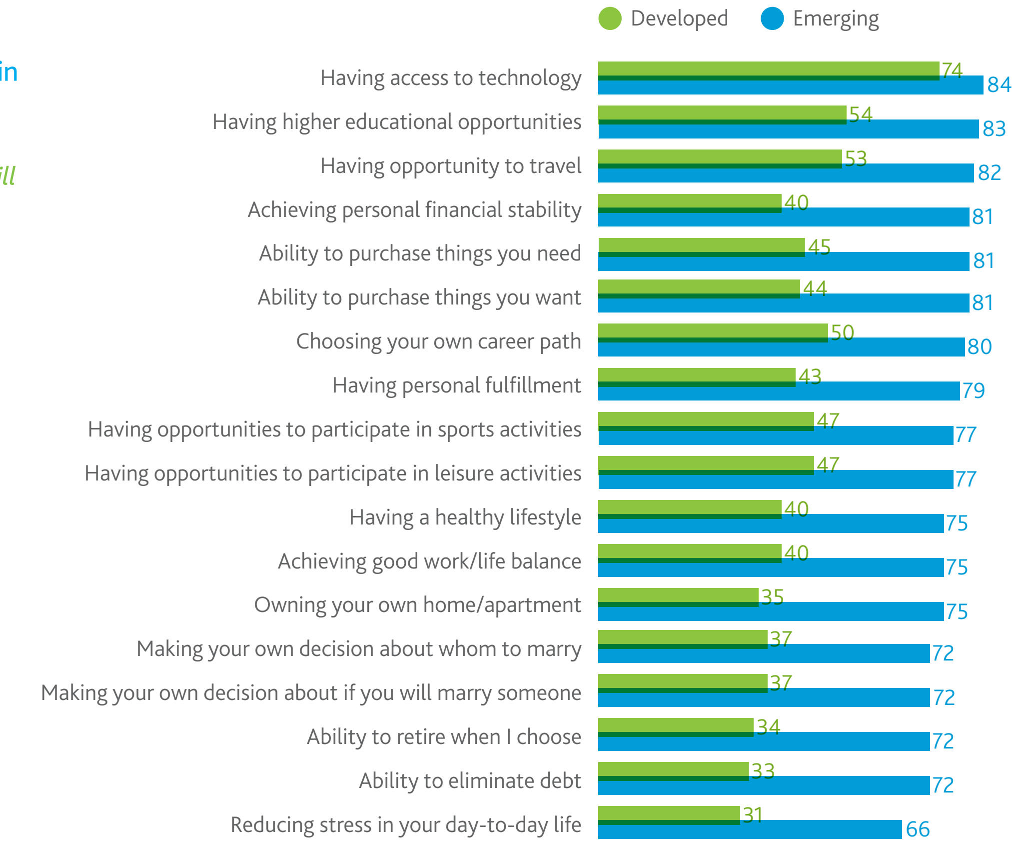
Connect to the bigger picture:

Give careful consideration to supporting organizations that help and empower women and share her views on corporate social responsibility.

MORE opportunities for future women in EMERGING countries

How do you think opportunities for your daughter when she's your age in the future will compare to opportunities available to you now in these areas?

She will have MORE opportunities than I do.

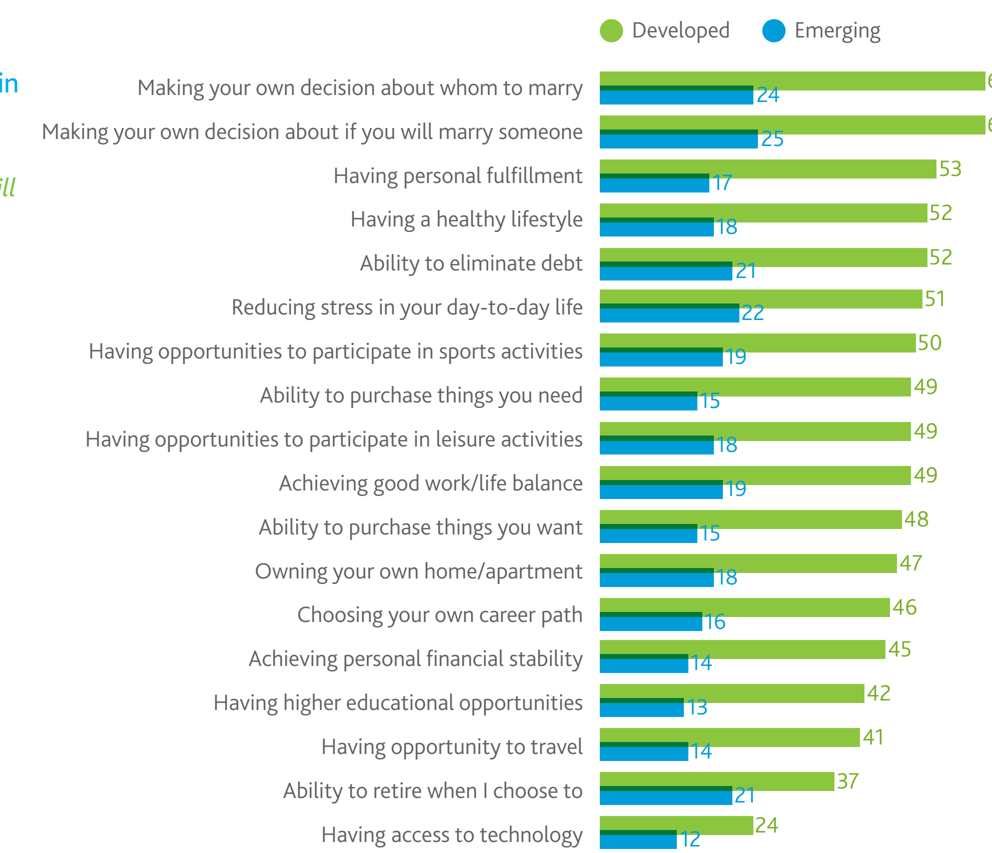


Source: Nielsen Women of Tomorrow Study 2011.

SAME Opportunities for future women in DEVELOPED countries

How do you think opportunities for your daughter when she's your age in the future will compare to opportunities available to you now in these areas?

She will have the SAME opportunities as I do.



Source: Nielsen Women of Tomorrow Study 2011.

Increasingly empowered, increasingly stressed.

Female respondents in all parts of the world say they are pressured for time, rarely have time to relax and feel stressed and overworked most of the time, but women in emerging countries feel the strain even more so than women in developed countries. Many women today are wearing multiple hats by balancing both career and home/family responsibilities. In many emerging markets, this revolutionary change is in the early stages of development, while in developed markets, this evolution has been on-going for a longer period of time.

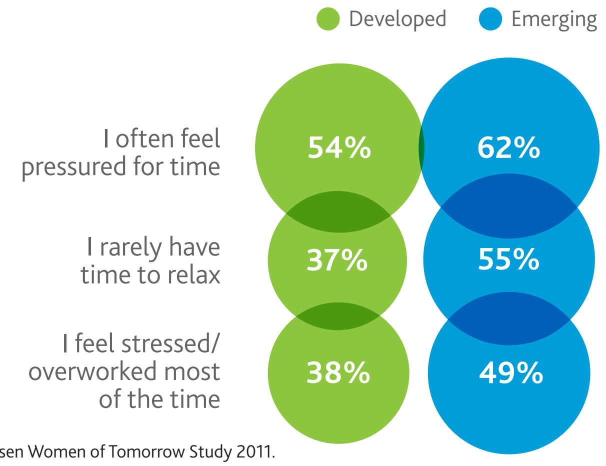
In emerging markets, women in India (87%), Mexico (74%) and Russia (69%) report they are most stressed/pressured for time; in developed markets, women in Spain (66%), France (65%) and Italy (64%) are most time-strained. Product innovations that save time and provide short-cuts are not only useful, but these improvements will go a long way in providing the resources needed by multi-tasking women who are always on the go.

Additionally, the research shows that women living in emerging countries allocate more of their extra earnings for basic essentials such as food and clothing, while women in developed countries indicate that they are more likely to allocate additional money toward vacations, buying groceries, paying off debts, and for general savings. One contributing factor in the higher stress levels reported among women in emerging countries is likely due to little spare cash remaining after the staples are covered to kick-back, relax and go on holiday.

Make her life easier:

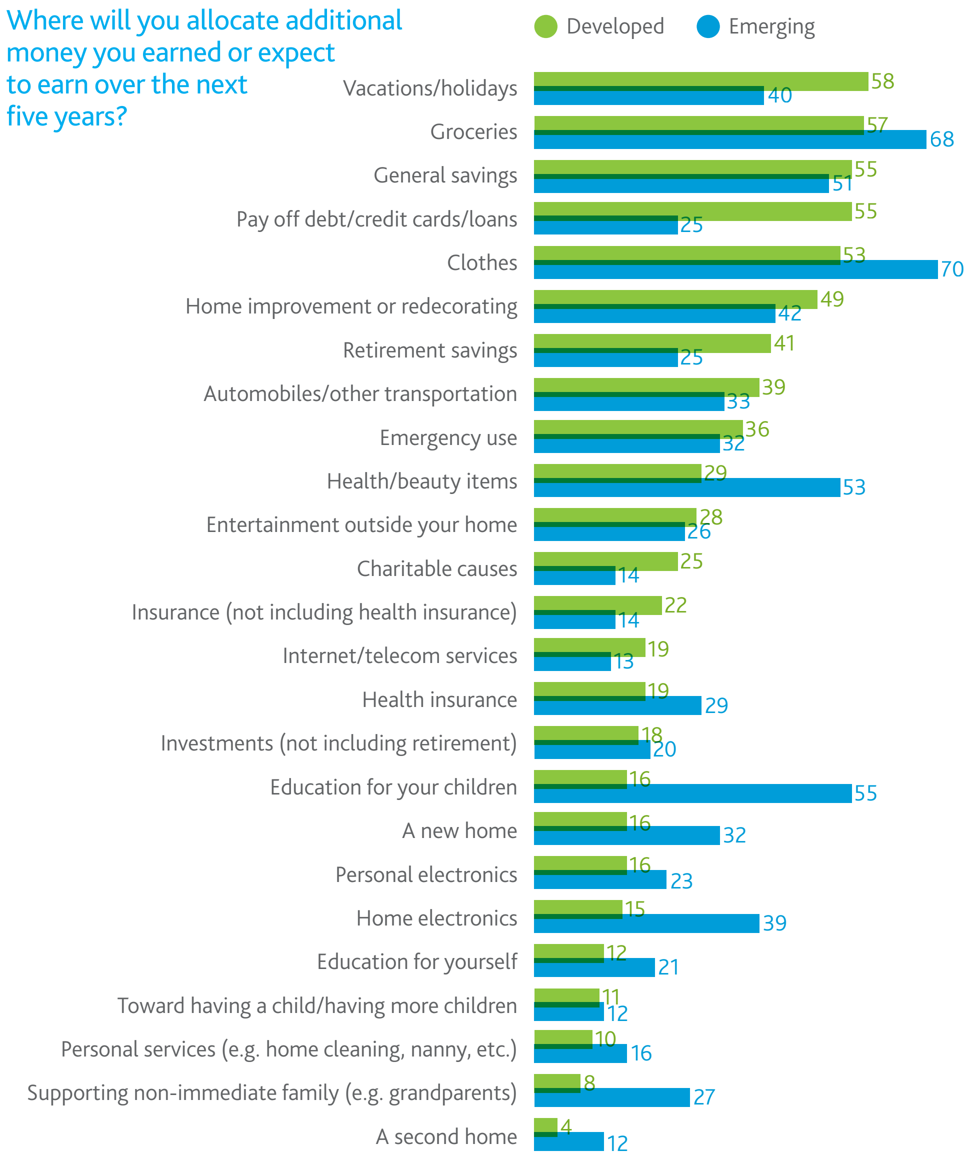
Develop time-saving product innovations that deliver multiple benefits and satisfy various needs. Give back rewards that ease her complex life.

As empowerment increases, so do her stress levels



Source: Nielsen Women of Tomorrow Study 2011.

Where will you allocate additional money you earned or expect to earn over the next five years?



Source: Nielsen Women of Tomorrow Study 2011.

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When it comes to life's decisions, women want to share responsibility.

Women may control the spending in a household, but what they really desire is to have more equally-shared responsibilities with the partners in their lives about decisions on all matters from taking care of the children to purchasing a car.

As more women enter the workforce, roles blur as traditional norms for predominantly male or female responsibilities change. There is strong consistency across developed and emerging economies that both men and women are equally "best fit" as the primary decision makers for most roles.

In developed economies, the notion of shared decision-making responsibilities is well established for all matters, although health and beauty purchases and taking care of the children at home remain the responsibilities where women are still the primary influencers.

In emerging economies, men are still viewed as the primary decision-making stakeholders when it comes to purchasing home electronics or cars, and women predominate in the health and beauty, food/grocery departments and on all matters having to do with the children inside and outside the home. But how much longer will decision making continue to fall along these lines?

And while shared decision-making responsibilities are desired, some traditional sentiments are evident: Across the countries surveyed, nearly one-third (31%) of both men and women believe that men are best fit to hold political office, maintain workplace positions of authority (29%) and make major purchases (22%).

Women feel burdened with their current level of decision making

For these types of purchases/activities, who is the most appropriate decision maker?

Developed	Men primarily	Both men and women equally	Women primarily
Food	6%	51%	43%
Health/Beauty	4	32	64
Clothes	5	50	45
Home electronics	37	54	9
Personal electronics	31	61	9
Car	45	49	6
Pharmaceutical prescription/OTC drugs	7	62	31
Family finances	22	63	15
Insurance	26	61	13
Child care at home	4	48	48
Managing child care outside the home	5	51	44
Social/activity memberships	11	73	16
Locations for social activities	9	71	20

Emerging	Men primarily	Both men and women equally	Women primarily
Food	8%	43%	48%
Health/Beauty	4	25	71
Clothes	6	48	46
Home electronics	46	45	9
Personal electronics	40	52	8
Car	55	40	6
Pharmaceutical prescription/OTC drugs	13	56	31
Family finances	33	53	14
Insurance	40	49	11
Child care at home	4	37	60
Managing child care outside the home	9	44	47
Social/activity memberships	21	61	18
Locations for social activities	16	63	21

Source: Nielsen Q1 Global Online Survey.

Treat her with equality:

Use collaborative and reciprocal language and include her as a shared decision maker in campaigns that are centered in industries that often cater to men, such as automotive, insurance and finance.

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Across generations women are alike in many ways, but they are also unique.

Across generations, from daughters to mothers to grandmothers, women all around the world worry about future opportunities, even in the face of optimism. High stress is universal, but daughters (average age of 30) are most stressed. As her family is early in its formation and income levels have not yet reached full potential, there is constant pressure to fulfill daily needs.

In analyzing generations, three segments were created: daughters, mothers, and grandmothers. These segments are based on age characteristics and include all women in the study, not just those who have children.

Mothers (average age 47) were split most distinctly into two groups (optimistic and uncertain) defined by where they live (emerging versus developed countries), driving the differences in optimism around opportunities for their daughters. This group experiences mid-level stress because even though income levels are higher, finances are still a cause for concern. Grandmothers (average age 67) are typically the most financially stable and thereby the least stressed. Not surprisingly, they are also most likely to believe they have achieved a good work-life balance.

The attitudes, outlooks, shopping habits and media preferences that women hold are similar in many ways, but generational differences are the most apparent. Most commonly held sentiments are decisions centered on buying quality products that provide good value at fair prices. Planned shopping trips are typical, but occasional impulse purchases happen too. All women watch TV and listen to the radio on a regular basis. The differences in finances as well as needs across generations, however, often dictate actual watch and buy habits.

Generational women exhibit traits that make her unique

	Daughters AVG. AGE = 30	Optimistic Mothers AVG. AGE = 47	Uncertain Mothers AVG. AGE = 47	Grandmothers AVG. AGE = 67
BUY	Most impulsive	More shopping ahead	Good value conscious	Most habitual shopper
WATCH	Heavier media user	Enjoys ads	Heavier texting/ email	Word of Mouth

Source: Nielsen Women of Tomorrow Study 2011.

Daughters are the most impulsive shoppers and they are most likely to try new products. Buying on promotions is important and she will often go to different stores to get the best deal. She is also the most tech-savvy of the three groups and is an earlier adopter of new technology. She is also the heaviest user of media and is the most influenced by all types of media.

Mothers in developed markets are heavy Internet users and rely on texting and email to communicate nearly as much as daughters. Planned shopping trips and buying products with good value are important, as are promotions and discounts. In contrast, mothers in emerging countries are still heavily reliant on TV and prefer TV even though she enjoys advertising regardless of the medium. Her phone is the primary method of communication. As her income increases, she expects to do more shopping in the future.

Grandmothers are strong planners and the most habitual shoppers. She is the most likely of the three groups to listen to the radio, but she is catching up on technology as she utilizes email.

As Baby Boomers (aged 47-65) become grandparents, technology usage among the older demographic will increase. As this segment is also the most financially stable, marketers have an opportunity to cross over generational lines with cross-platform advertising that speaks to their lifestyle habits. Likewise, messaging that empathizes with the high stress levels of being a new or established mom will resonate in an impactful way.

Cater to her distinct needs:

Think about the products women of different age groups purchase and the media technologies they use and develop generational marketing strategies that address the diverse habits that drive behavior. Do not assume that all women are the same.

Social media has become an indispensable tool.

Women want to expand beyond career and home to influence decisions in both business and politics to benefit others. Women continue to be caregivers at home, but they also want to positively affect the broader community in their neighborhoods, at work and in government. Women everywhere echoed similar sentiments about wanting to play an integral and equal part in making a positive change for the future and affecting policies that would impact her family and the environment.

Social networking is connecting women across the globe, broadening her "circle of influence" and becoming an indispensable tool for solving problems, asking questions, and building the community. It is more than just entertaining; social media has functional benefits. Nielsen estimates that there are on average between 200–300 dedicated women's discussion forums across global markets (not counting individual blogs) where women connect with one another on issues ranging from family life, managing careers, health and wellness, shopping and increasingly financial health

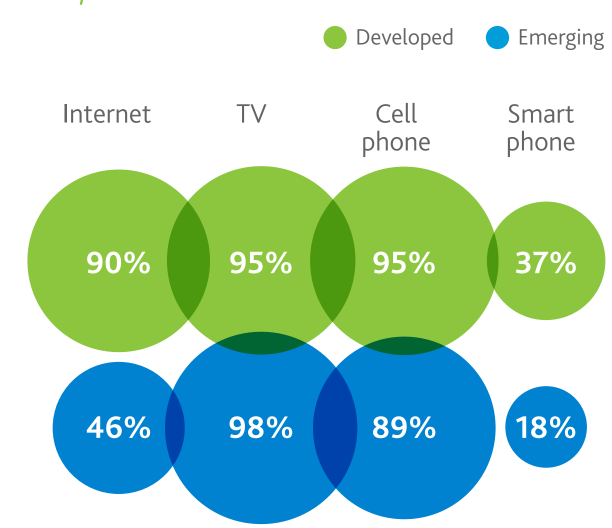
Online, women are more engaged than men, spending more time on fewer sites during a single sitting—a valuable attribute to advertisers. They also visit more social and community sites, which is especially important given the popularity of immediate online/social discussion during major TV events like awards shows and reality programming.

On a social level, women talk and text on their mobile devices more than men. Nielsen data shows that women talk 28 percent more and text 14 percent more than men every month; they are also heavier users of social features of phones (SMS, MMS, social networking) compared to men who tend to use functional features more (GPS, email, Internet).

Marketers have an opportunity to better connect with women online to make them feel like valued customers —and then reward them for being an advocate for the brand. This pay-it-forward approach is perfectly aligned with how women live their lives.

The women of tomorrow are connected

Claimed penetration in her household



Source: Nielsen Women of Tomorrow Study 2011.

"Women who will be closely connected to society through work will be demonstrating leadership by forging various communities where there is the emphasis on individuals' qualification differences rather than differences between the sexes." – Japan

"There will be an increase in the number of women in higher political office thereby being able to affect real change in society in areas where it is needed (e.g., poverty, health issues, education issues)." – Canada

"Women's involvement in society is increasing in all spheres (economic, social, medical, political); they want to take an active part in their children's futures." – France

Be available and informed:

Offer online 24/7 customer support, Twitter accounts and manufacturer-sponsored forums. Listen and learn. Go on online blogs and forums to find out how women think and engage.

Only 10% of women are highly influenced by web ads with social context.

Social networking has the power to connect women across the globe, and as it does, their communities and circles of influence become that much larger. Today, Nielsen reports that social media usage has reached high penetration rates in countries such as the United States (73%), Italy (71%), South Korea (71%), Australia (69%), France (64%), Brazil (63%) and Germany (50%).

And as the adoption rates of media technology continue to rise in emerging countries, these tools are making an important impact on women's lives. Three-quarters of women in emerging countries say the computer and the cell phone make their life better overall, compared to just over half of women in developed countries.

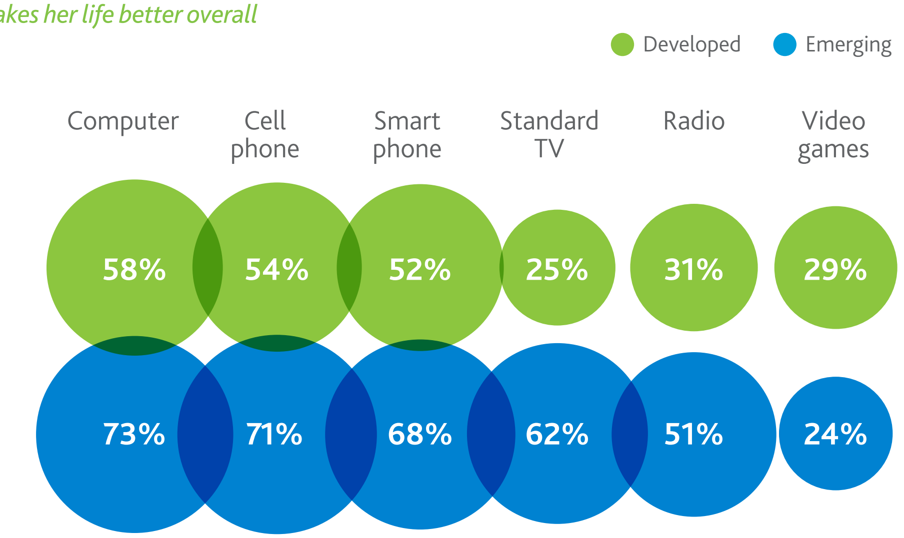
While technologies that appeal to women's innate nature to engage, connect and multi-task are life-changers, advertising on social media sites is just in the early stages of making an impact to influence decisions, with significant room to grow. Only six percent of women in developed countries and 16 percent of women in emerging countries say they are highly influenced by web ads with social context shown on social media sites.

Women in emerging countries are more highly influenced than women in developed countries. There is a fairly even distribution among the type of web ads that are most persuasive. Standard web ads that have a social context showing which friends liked or followed an advertised brand has the slight edge over web ads that appear as a newsfeed update or standard web ads.

In emerging countries, women in India are most highly influenced by all three types of web ads and women in South Africa and Russia are least persuaded. In developed countries, South Korean women are most influenced by social media advertising and women in Australia and Sweden are most impartial.

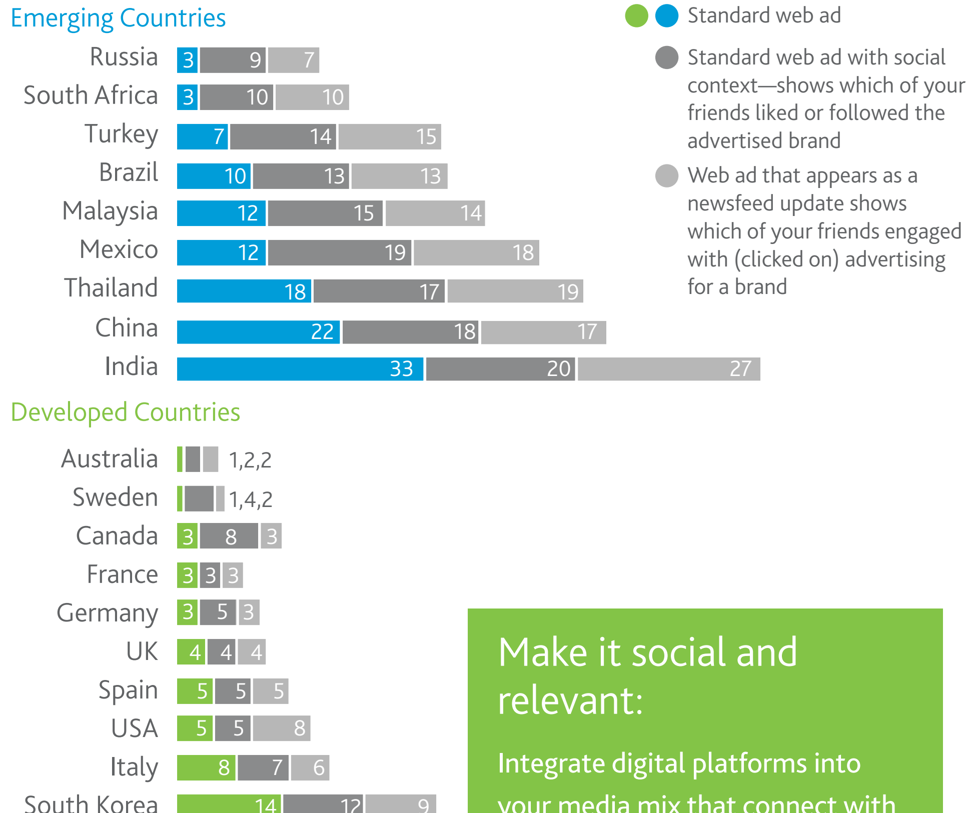
Technology is making her life better, especially in emerging markets

Makes her life better overall



Source: Nielsen Women of Tomorrow Study 2011.

Even with increasing relevancy, influencing her is a challenge



Source: Nielsen Q1 Global Online Survey.
Note: Japan and Nigeria are not included

Make it social and relevant:

Integrate digital platforms into your media mix that connect with women's innate nature to engage and multi-task. Create messaging that focuses on the issues that are important in her life.

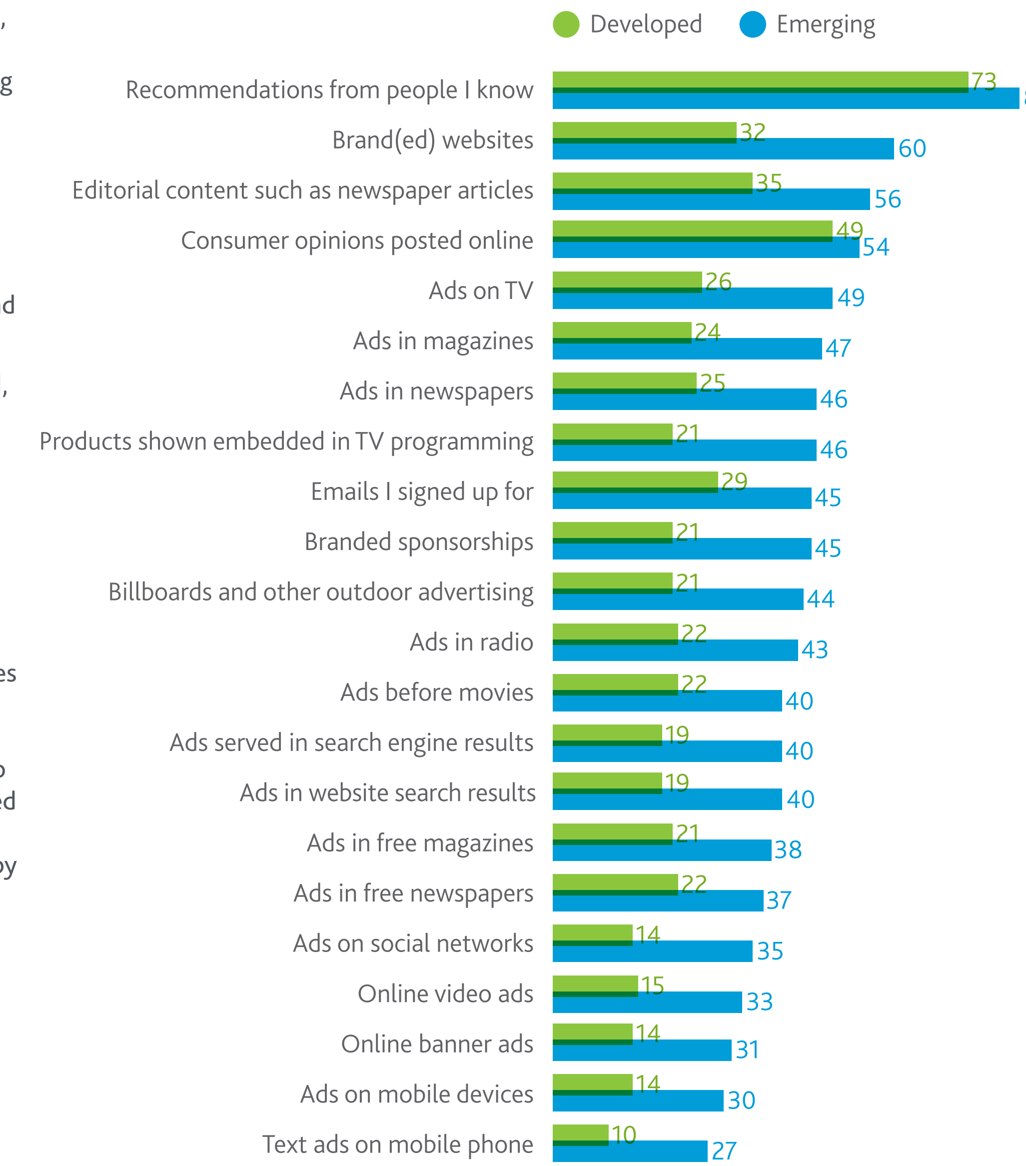
She trusts those she knows.

As media channels continue to fragment, gaining share of space, mind and trust will be an on-going challenge. Advertising via online media outlets needs to be considered a place where earning a woman's trust is the intention and not simply just another reach mechanism. By paying attention to how female consumers respond to advertising via various media outlets, more precise —and successful —campaigns will follow.

Across 22 forms of advertising measured, "recommendations from people you know" is by far the most trustworthy advertising source for women surveyed in both developed (73%) and emerging countries (82%), but when it comes to paid advertising, opinions vary widely. After recommendations and opinions posted online (49% developed/54% emerging), women in developed countries put the most confidence in editorial content in newspapers (35%), branded websites (32%) and emails she signed up for (29%). In emerging countries, branded websites (60%) are the most trusted advertiser-produced medium, followed by newspaper editorials (56%), and ads on TV (49%).

Women trust recommendations from people she knows, but when it comes to advertising, opinions vary widely

Percent of women that say they "trust somewhat" and "trust completely"



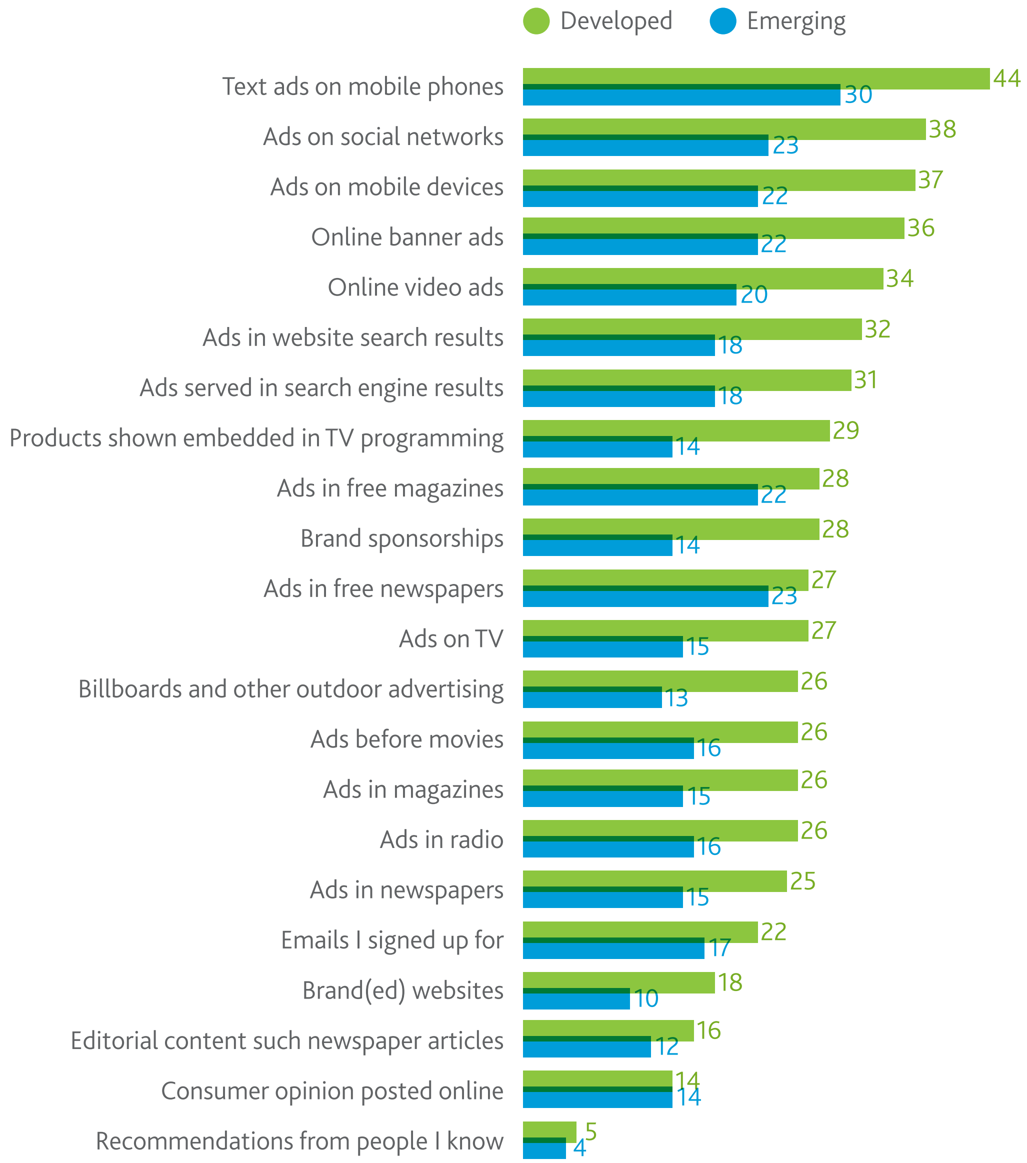
Source: Nielsen Q1 Global Online Survey.

Across the countries included in the study, the majority of women say they are most reticent to trust text ads on mobile phones (44% in developed countries say they do not trust vs. 30% in emerging), ads on social networks (38% developed vs. 23% emerging), and ads on mobile devices such as smartphones and tablet computers (37% developed vs. 22% emerging). Online banner ads have ample upside when it comes to gaining women's trust.

Marketers need to think about how they can create opportunities that will get women more intimately engaged with their brands, products and solutions using online platforms. Digital ads must be designed for an online audience; simply posting print ads online is not sufficient.

Women are more reticent to trust ads on mobile phones, social networks and smartphones

Percent of women that say they "don't trust much" and "don't trust at all"



Source: Nielsen Q1 Global Online Survey.

Earn her trust:

Create cross-platform campaigns that are customized for the medium, but stay consistent with the message. Be authentic and deliver the relevancy she demands.

TV is the preferred source to get information about new products and services.

When it comes to getting information about new products, television continues to be the most pervasive form of media and is the number one source that women rely on across continents. In 10 of 10 emerging markets and in seven of 11 developed markets analyzed, television outranked 14 other sources of information. Word-of-mouth was listed as either the second or third choice in nine of 10 emerging markets and in eight of 11 developed markets. Printed newspapers and magazines was another popular source of information for women in emerging markets, while the use of the Internet was more pervasive in developed markets.

When it comes to getting information about new stores, television is still the top choice for women in emerging markets, but word-of-mouth is the most popular source for women in eight of 11 developed markets. Word-of-mouth ranked second with women in nine of 10 emerging markets. Information sources placing second or third for women in developed markets varied between television, Internet, newspapers and direct mail.

Worthy of note is the disparity between emerging and developed countries when it comes to TV and all other information-seeking choices for both new products and new stores. This is an important marketing consideration—especially in developed markets—when balancing the marketing weight to put into various media vehicles.

In emerging countries, the gap between TV and all other information choices is significant:

- New products: 54 percent prefer TV, versus 11 percent word-of-mouth and 7 percent magazines
- New stores: 42 percent prefer TV, versus 18 percent word-of-mouth and 10 percent newspapers

But in developed countries, other media vehicles are closing the gap on TV as influential information sources:

- New products: 24 percent prefer TV, versus 15 percent Internet searches and 14 percent word-of-mouth.
- New stores: 23 percent prefer word-of-mouth, versus 14 percent TV and 13 percent Internet searches

Despite today's dizzying array of media options, old-fashioned dependence on friends and family still holds sway as one of the best and most reliable sources for information. Combining the old with the new, savvy marketers should look to digital media options and applications to engage female consumers to earn their loyalty. But caution is necessary. Digital and mobile strategies can't be simply haphazardly added to the end of a marketing plan. Careful consideration into creating opportunities for how women can better engage with their brands, products and solutions will earn their trust and their dollars.

Top three sources for information about new products and new stores

EMERGING COUNTRIES	New Products			New Stores		
Brazil	1. TELEVISION	2. Internet	3. Word of mouth	1. TELEVISION	2. Word of mouth	3. E-mail
China	1. TELEVISION	2. Word of Mouth	3. Salesperson	1. WORD OF MOUTH	2. Television	3. Newspaper
India	1. TELEVISION	2. Magazines	3. Newpaper / Word of mouth	1. TELEVISION	2. Word of mouth	3. Newpaper
Malaysia	1. TELEVISION	2. Newspaper	3. Word of mouth	1. TELEVISION	2. Word of mouth	3. Newspaper
Mexico	1. TELEVISION	2. Word of mouth	3. Magazines	1. TELEVISION	2. Word of mouth	3. Newspaper/ Magazines
Nigeria	1. TELEVISION	2. Radio	3. Word of mouth	1. TELEVISION	2. Word of mouth	3. Radio
Russia	1. TELEVISION	2. Word of mouth	3. Internet/ Salesperson	1. WORD OF MOUTH	2. Television	3. Billboards
South Africa	1. TELEVISION	2. Newspaper	3. Magazines	1. TELEVISION	2. Word of mouth	3. Radio
Thailand	1. TELEVISION	2. Newspaper	3. Word of Mouth/ Salesperson	1. TELEVISION	2. Word of mouth	3. Billboards
Turkey	1. TELEVISION	2. Word of mouth	3. Magazines	1. TELEVISION	2. Word of mouth	3. Magazines
DEVELOPED COUNTRIES	New Products			New Stores		
Australia	1. TELEVISION	2. Internet searches	3. Word of mouth	1. TELEVISION	2. Newspaper	3. Word of mouth
Canada	1. TELEVISION	2. Direct Mail	3. Word of mouth	1. WORD OF MOUTH	2. Television	3. Newspaper
France	1. TELEVISION	2. Internet searches	3. Word of mouth	1. WORD OF MOUTH	2. Billboards	3. Internet searches
Germany	1. WORD OF MOUTH	2. Television	3. Internet searches	1. WORD OF MOUTH	2.Direct mail	3. Newspaper
Italy	1. TELEVISION	2. Internet searches	3. Direct mail	1. WORD OF MOUTH	2. Internet searches	3. Direct mail
Japan	1. TELEVISION	2. Internet searches	3. Word of Mouth	1. WORD OF MOUTH	2. Internet searches	3. Television
South Korea	1. INTERNET SEARCHES	2. Television	3. Web Communities	1. INTERNET SEARCHES	2. Word of mouth	3. Television
Spain	1. WORD OF MOUTH	2. Television	3. Internet searches	1. WORD OF MOUTH	2. Television	3. Internet searches
Sweden	1. DIRECT MAIL	2. Newspaper	3. Television	1. DIRECT MAIL	2. Newspaper	3. Word of mouth
United Kingdom	1. TELEVISION	2. Word of mouth	3. Internet searches	1. WORD OF MOUTH	2. Television	3. Internet searches
United States	1. TELEVISION	2. Word of mouth	3. Internet searches / direct mail	1. WORD OF MOUTH	2. Direct mail	3. Television

Source: Nielsen Women of Tomorrow Study 2011.

Combine the old with the new:

Don't underestimate the power of word-of-mouth advertising and leverage digital platforms combined with traditional high reach and frequency vehicles to spread positive awareness of your brands and products.

Across 95% of countries, quality is the #1 driver of brand loyalty.

While price is an important influencer for purchasing decisions across most categories, it does not even make the top three criteria in most countries when it comes to faithfulness to a brand. The number one driver of brand loyalty across 12 factors in 20 of 21 countries is quality (women in the United Kingdom placed trust ahead of quality).

Across industry sectors: food, beverages, health and beauty, apparel, personal and home electronics, pharmaceuticals and automotive, women in the study provided insights to help answer three critical questions:

- What factors determine the store you shop in?
- What influences you to make a purchase?
- What makes you loyal to a particular brand?

When choosing which stores to shop in or what brands to purchase, price, good value, quality products and convenience are the most influential drivers for women. But, when it comes to winning their loyalty, it is quality —not price —that keeps them coming back for more. Price and value can't be ignored as features that attract an initial purchase decision, but the long-term play has to be about quality.

Earn women's trust early in her role as household purchaser, and she will be more likely to try new products in the mix. By balancing short-term strategies like price with longer-term quality and value objectives, both return-on-investment and customer retention strategies will be achieved.

Top three attributes that make you loyal to a particular brand

EMERGING COUNTRIES			
Brazil	1. QUALITY	2. Brand Trust	3. Price
China	1. QUALITY	2. Efficacy	3. Familiarity
India	1. QUALITY	2. Price	3. Innovation
Malaysia	1. QUALITY	2. Price	3. Brand Trust
Mexico	1. QUALITY	2. Price	3. Efficacy
Nigeria	1. QUALITY	2. Familiarity	3. Efficacy
Russia	1. QUALITY	2. Brand Trust	3. Efficacy
South Africa	1. QUALITY	2. Price	3. Familiarity
Thailand	1. QUALITY	2. Familiarity	3. Brand Trust
Turkey	1. QUALITY	2. Brand Trust	3. Innocation
DEVELOPED COUNTRIES			
Australia	1. QUALITY	2. Brand Trust	3. Efficacy
Canada	1. QUALITY	2. Brand Trust	3. Familiarity
France	1. QUALITY	2. Efficacy	3. Brand Trust
Germany	1. QUALITY	2. Efficacy	3. Familiarity
Italy	1. QUALITY	2. Efficacy	3. Brand Trust
Japan	1. QUALITY	2. Brand Trust	3. Efficacy
South Korea	1. QUALITY	2. Brand Trust	3. Efficacy
Spain	1. QUALITY	2. Efficacy	3. Familiarity
Sweden	1. QUALITY	2. Brand Trust	3. Efficacy
United Kingdom	1. BRAND TRUST	2. Quality	3. Efficacy
United States	1. QUALITY	2. Brand Trust	3. Familiarity

Source: Nielsen Women of Tomorrow Study 2011.

Deliver quality:

Use promotion and discount tactics thoughtfully. She is willing to pay more for new products that deliver quality and earn her trust.

About the Women of Tomorrow Survey

The Nielsen Women of Tomorrow Survey was conducted between February and April 2011 and polled nearly 6,500 women in 21 countries throughout Asia Pacific, Europe, Latin America, Africa and North America. The sample was fielded in developed countries using an online methodology. In emerging countries a mixed field methodology (MFM) approach of online, central location and/or door-to-door interviewing was used. The margin of error is +/- two points. The countries in the study represent 60% of the world's population and 78 percent of GDP.

Additionally, results from the Nielsen Q1 2011 Global Online Survey were referenced and they are noted in the respective charts. The Q1 Global Online Survey was fielded March 23 —April 12, 2011.

About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

For more information, please visit www.nielsen.com.

Countries in the Study

DEVELOPED MARKETS

COUNTRY	APPROACH	SAMPLE
Australia	Online	301
Canada	Online	312
France	Online	313
Germany	Online	308
Italy	Online	307
Japan	Online	299
South Korea	Online	315
Spain	Online	341
Sweden	Online	312
United Kingdom	Online	306
United States	Online	307
Total Developed		**3421**

EMERGING MARKETS

COUNTRY	APPROACH	SAMPLE
Brazil	MFM	318
China	Door-to-Door	317
India	Door-to-Door	312
Malaysia	Door-to-Door	300
Mexico	MFM	308
Nigeria	Door-to-Door	300
Russia	MFM	300
South Africa	Door-to-Door	300
Thailand	Door-to-Door	298
Turkey	Door-to-Door	300
Total Emerging		**3053**

MFM = Mixed Field Methodology
Note: Study was fielded before the 2011 Japan earthquake and tsunami.