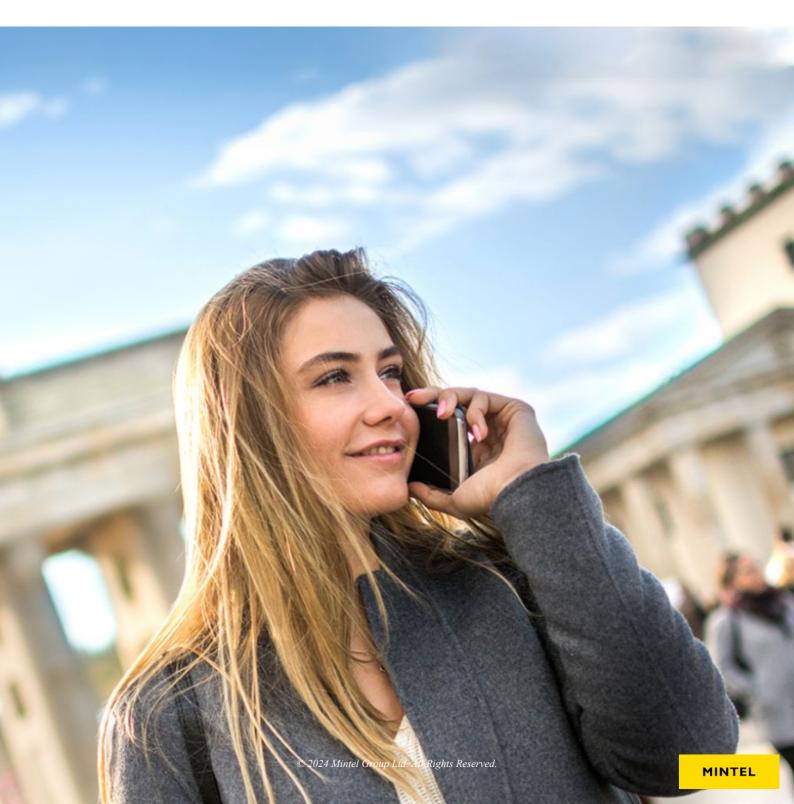
MARKETING TO WOMEN – GERMANY – 2020

German women value equality, out-dated gender portrayals in advertising risk offending them. COVID-19 changes their perceptions of advertising in the medium term.



Dr. Christina Wessels, Category Director, Lifestyles, Health & Wellbeing, Household Care & Leisure, Germany



Report Content

EXECUTIVE SUMMARY

- COVID-19's impact on German consumer behaviour
- Mintel's perspective

Market context

- COVID-19 impacting on German women
- Changing gender roles

What consumers want and why

- · Women want: advertising for food & drink
- · Women want: TV and print advertisements work for most; mothers listen to radio
- · Women want: a spotlight on mental wellbeing
- · Women want: advertising storylines that feel genuine
- · Women want: ads that make them laugh
- · Women want: to engage with brands positively
 - Graph 1: agreement that men are more likely than women to ignore health problems, women vs men, October 2019

Opportunities

- Young women take advertising seriously
- A rejection of stereotypes
- · Older women prefer to be entertained by adverts

MARKET DRIVERS

- Graph 2: "How worried are you about the risk of being exposed to the Coronavirus (also known as COVID-19)?", March 3-16, 2020
- Graph 3: "To what extent are you worried about how the outbreak might affect your lifestyle?", March 3-16, 2020
- Graph 4: number of live births (000s), 2010-18
- · Employment rates are lower among women
 - Graph 5: employment rate by gender and age, 2008 vs 2018
 - Graph 6: flexible working arrangements, by gender, 2017
 - Graph 7: students enrolled in STEM courses (000s), by gender, 2016-19
- Case study: automotives
 - Graph 8: who shops for groceries, by gender, June 2019
 - Graph 9: average daily time spent on activities*, by gender, October 2019
 - Graph 10: internet activities for private purposes, by gender, September 2019

- · Ageing population will pose a challenge for some marketers
 - Graph 11: share of maximum population projections for women, by age group, 2020-30

WHAT CONSUMERS WANT, AND WHY

Interest in category advertising

- · Women's top three advertising interests are food & drink, fashion and travel
 - Graph 12: women's interest in sector advertising, October 2019
- · Women have higher interest in ads for food & drink, fashion and beauty products compared to men
 - Graph 13: interest in sector advertising, women vs men, October 2019
- Promote enjoyment of food to appeal to women as well as men
- · Use food as a way to combat loneliness
- Fashion brands target young women
 - Graph 14: women's interest in fashion and beauty advertising, by age, October 2019
- · Beauty has a broader reach than fashion
- Youngest women are keenest to travel
 - Graph 15: interest in advertising for technology (eg smartphones, televisions), women vs men, October 2019
- · Car brands can appeal to women with their environmental credentials
- · Educating through humour to appeal to women
 - Graph 16: women's interest in financial services advertising, by working status, October 2019

Interest in advertising media

- TV advertising is most likely to be watched by women
 - Graph 17: appeal of advertising mediums to women, October 2019
 - Graph 18: interest in TV and print advertising, by age, Oct 2019
 - Graph 19: reading news websites/blogs electronically, by gender and age, July 2019
 - Graph 20: top three advertising media among parents of under-16s, October 2019
 - Graph 21: women's interest in types of online advertising, by age, October 2019
 - Graph 22: interest in social media advertising, women and men by age, October 2019

Interest in greater diversity in advertising

- Graph 23: women's interest in diversity in advertising, October 2019
- · German women are more open to mental health advertising compared to men
 - Graph 24: interest in diversity in advertising, women vs men, October 2019
- · German women are more likely than men to seek help for their mental wellbeing
 - Graph 25: interest in seeing more diversity in advertising, women by age, October 2019
- · German women want to see ads featuring more diverse body sizes
- Greater demand for 'optically mature' women
 - Graph 26: interest in seeing more sexualities in advertising, women by age, October 2019

Attitudes towards stereotypes in advertising

- Women feel equally as stereotyped as men
 - Graph 27: women's attitudes towards stereotypes in advertising, October 2019
- · Sex no longer sells
- · This is what feminism looks like
 - Graph 28: agreement with statements on diversity in advertising, women by age, October 2019
 - Graph 29: agreement with select statements on stereotypes in advertising, women by age, October 2019

How to make advertising memorable

- · Laughter creates a memorable ad
 - Graph 30: memorable elements in advertising campaigns, women, October 2019
- Women are even more likely than men to want advertisers to make them laugh
 - Graph 31: memorable elements in advertising campaigns, women vs men, October 2019
- · Categories with least female interest, for instance beer, can increase appeal with amusing marketing campaigns
- · Award winning campaign features aspirational women and challenges stereotypes
- Aspirational female role models are important for younger women

How women respond to advertising

- Women are rarely provoked into a response by advertising
 - Graph 32: women's behaviours around advertising in the last six months, October 2019
 - Graph 33: Women's behaviours around advertising in the last six months that are positive for brands, by age, October 2019
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 - Graph 35: women's behaviours around advertising in the last 6 months, by age, October 2019

Attitudes towards social stereotypes

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 - Graph 36: women's attitudes towards social stereotypes, October 2019
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 - Graph 37: attitudes towards social stereotypes, women vs men, October 2019
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 - Graph 38: women's agreement with gender-based social stereotypes, by age, October 2019
- · Women agree that men are more likely to ignore health problems
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- Graph 40: new product launches with a female claim, by category, 2016-19
- Catering for women goes beyond beauty & personal care
- GymQueen lifestyle brand for women
- · Product launches still like to use gender identifying colour schemes
- Gender stereotyping starts in infancy

APPENDIX

Appendix - consumer research methodology

Consumer research methodology

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us	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
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