ALL THE SINGLE LADIES

REACHING THE MODERN INDEPENDENT WOMAN

PRESENTED BY:
HILL HOLLIDAY

A report on the unmarried female consumer
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“And as her birthdays crept gradually toward that tragic thirty-mark, marriage seemed farther from her life than ever. She was often a bridesmaid, but never a bride.”

INTRODUCTION

Perhaps no demographic term in American culture is as loaded as “single woman.” Certainly the term has enjoyed connotations both good and bad throughout history, signaling something quite different in 1925, 1945, 1975, and today.

The above print ad for Listerine, circa 1930, serves as a remarkable reminder of just how broadly marketers must adapt to changing social and cultural norms, and how they affect the female consumer. It’s impossible to imagine any brand marketing any product to women using this tone without irony today.

Consider for a moment how much the idea of the “single woman” as a marketing category has changed in just the last few decades alone. It’s been quite a journey from Jane Austen to Helen Gurley Brown, from Bridget Jones and Carrie Bradshaw to Tracee Ellis Ross.

Today, the “standard” American household reflects a changing cultural tide: the average age of marriage continues to rise, and there are almost as many single households as married ones in the United States. In addition, there are more unmarried women than unmarried men.

While CMOs chase Millennials, Millennial moms, and Gen Z, it’s our perspective that “single women” is a growing, valuable, and underserved group. And yet, in much of today’s marketing communications, a dated stigma about single women remains pervasive.

With this context in mind, Origin, an independently operated market research company owned by Hill Holliday set out to better understand this audience and their views on life, marriage, work, and more.

While we understand that “single women” is actually a constellation of individuals representing many different life stages and domestic arrangements, for the purposes of this research we chose to focus on women who’ve remained never-married and without children into their 30s and 40s, a pivotal time when they begin to plan their future for “me” and not “we.”

We conducted proprietary research, including focus groups and a national quantitative study conducted with over 1,000 respondents.

The study revealed valuable insights about their attitude toward being single, their assessment of goals and milestones, their portrayal in the media, and how they differ from both single men of the same age and their married female counterparts.
A new approach to understanding, reaching, and resonating with modern single women is overdue and urgently needed. Across the United States, a new consumer segment is poised to dramatically impact the economy of the future: single women. How can single women be considered new? Simply put, many brands and advertisers have failed to adjust to the unprecedented pace of change affecting nearly every area of single women’s lives — from work, to social life, to financial planning.

Women are the world's most dominant consumers, controlling 85% of U.S. household buying power — and nearly half of them (45.2%) are single. Put another way, women are now nearly as likely to be single as they are married, and the number of single women continues to rise, outpacing the growth of the single male population.

Brands who underestimate the buying power of adult single women are leaving opportunity on the table. In today’s fragmented marketing landscape, brands that fail to acknowledge the modern single woman — or worse, insult her — will be chasing the rewards of those that get it right. This has implications for all brands; nearly half of the single women we surveyed think that single women are “non-existent” in advertising, and 44% do not think that they are fairly represented. Those in the home buying, travel, automotive, financial planning, and insurance categories should take particular note.

Our research sought to look beyond common understandings of contemporary life for single women to explore the role that culture and advertisers play in perpetuating dated stigmas, and the opportunities that lie ahead for brands.

Our study unearthed four simple truths:

1. Single Women Are Content with Their Current Life Path But Wonder If There’s More
2. Single Women Shy Away From Judgement by Others
3. The Financial Literacy Gap Still Exists for Single Women
4. Single Women Want Work/Life Balance, Too

This report explores each of these simple truths and the implications for modern consumer brands. It was our hope in conducting the research and sifting through the data that the results would challenge conventional assumptions about single women and accurately reflect a more modern face of this consumer segment.

We invite you to explore the findings, insights, and emerging opportunities for brands in the following pages. For more information about the report or to discuss how the data can impact your marketing strategy, please contact us here.
Our study involved a two-step process, including both a detailed quantitative survey fielded from qualified respondents of single men, single women, and married women, and qualitative focus groups with a similar makeup. We compiled data to specifically identify where gender gaps lie in goal setting and future planning, the experience of being single, and the perceived representation of being single in U.S. culture.

The study is based on the views of 1,217 diverse, qualified respondents across the United States between 30–45 years of age. Both single women and men included in the study were never married, and had no children.

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“ My money is green too. My money is not pink.”

Source: Hill Holliday/Origin, U.S. Single Women Focus Group Participant, 2018

SURVEY METHODOLOGY
A SIGNAL OF CHANGE

“Centuries ago, unmarried women over age 25 were considered a burden on their families and were often shunned from social circles, so unless they were lucky enough to have the talent and drive of the Brontë sisters or Louisa May Alcott, they faced a life of modest accomplishments and possible financial hardship. In 2018, this kind of bias has no place or relevance in modern culture. These women are independent, accomplished, and have tremendous spending power — it’s time to recognize that.” – Lesley Bielby, Chief Strategy Officer, Hill Holliday.

As recently as 1970, the average age at which a woman married was 21; today, that age has risen to 28. Today, marriage just consumes less space in the lives of single women and in our culture than it once did. In fact, our study shows that most single women age 30–45 enjoy being single more so than their male counterparts, have a strong sense of self, and have more career ambitions than their married counterparts.

Being single is no longer a life stage; rather, it’s become a state of being. Despite this dramatic shift, single women still believe that there is an expectation from others that you can’t be happy in your 30s or 40s if you’re single.

UNMARRIED PEOPLE COMPRISING MORE THAN

45% of the adult population in the United States


UNMARRIED PEOPLE MAKE UP MORE THAN

47% of our households, and make up fully half of our workforce


57% of single women agree there’s an expectation from others that you can’t be happy in your 30s or 40s if you’re single

Source: Hill Holliday/Origin, U.S. Single Women Study, 2018
THE STATE OF SINGLE WOMEN

The notions of confidence, ambition, and independence have historically not been the first words used to describe single women, but this narrative has changed over time. Our study found that these are the exact qualities today’s single women are using to describe themselves and their single female counterparts.

While confident, many single women still carry concerns over achieving financial security and over whether or not they will ever find a partner or have children. These concerns inform several habits that are holding single women back from hitting the milestones that matter most to them. For example, our study found that many single women are not comfortable negotiating pay raises or the price of a new car. And many still resist traveling alone despite a strong desire to, or having a financial plan for retirement beyond a 401(k). Single men report the opposite.

On the whole, today’s single women have a strong sense of self and reject the outdated notion that they’re missing out on all that life has to offer. Our survey explored the importance these women place on a variety of adulthood milestones, and found that the top three priorities are living on their own, establishing a career, and financial security. Getting married and having children fall further down the list.

THE TOP SIX ATTRIBUTES

single women associate with women, 30-45, single, and never married

% of single women survey respondents who selected each attribute:

- Independent: 77%
- Ambitious: 43%
- Confident: 54%
- Strong-minded: 42%
- Responsible: 49%
- Adventurous: 32%

Source: Hill Holliday/Origin, U.S. Single Women Study, 2018

HOW COMFORTABLE ARE SINGLE WOMEN

at performing the following tasks themselves, without support or help from a partner, friend, or family member?

% of single women respondents:

- Managing investments and stock portfolios: 11%
- Negotiating the sale price of a car: 23%
- Negotiating a raise at work: 19%
- Traveling alone: 26%
- Buying a home: 27%
- Planning for retirement: 25%

Source: Hill Holliday/Origin, U.S. Single Women Study, 2018

LIFE MILESTONES

ranked in order of priority by single women

% of single women respondents who ranked each item #1:

- Living on your own: 44%
- Establishing a career: 34%
- Financial security: 27%
- Getting married: 20%
- Getting promoted at work: 12%
- Moving to a new state and/or country: 10%
- Having children: 8%
- Buying your dream car: 8%
- Planning for retirement: 8%
- Buying a home: 6%

Source: Hill Holliday/Origin, U.S. Single Women Study, 2018

single men are more than 2X more likely than women to feel very comfortable managing investments

single women report that establishing a career is 4X more important than having a child
Overall, our survey revealed that single women have complex self-perceptions, but they generally view themselves and others like them (unmarried, without children) in a positive light. This is particularly encouraging, considering the many ways that our culture and the social situations that surround us influence how we see ourselves, and how we think others see us.

Today, subliminal and overt messages to these women from media, entertainment, and culture often cultivate a fear of not finding love, being alone, and balancing professional and family life, selling the notion that downplaying success, ambition, and personal goals will make women more attractive partners. We found that these messages, while they may not inform how single women view themselves, do manifest in how single women present themselves to others.

To get at these self-perceptions, we asked survey respondents to create three separate mock profiles of themselves, including a written profile and pick-list selections describing their relationship status, personal and professional goals, and desire to have children. Respondents were asked to tailor each profile to address a distinct social context: social life (e.g., Facebook), dating life (e.g., Match.com), and professional life (e.g., job application). The primary purpose of this experiment was to understand how single women choose to present themselves in varying situations in light of expected social norms and the human desire to conform. How are women describing their professional and personal ambitions when chatting with friends? When dating? When at work? On Facebook? The outcome of the experiment was, in some ways, as surprising as it was reassuring.

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The Social Self

Context influences how much single women state they want to earn.

When asked how much money they want to earn per year 10 years from now, single women surveyed were 24% more likely to understate their desired salary in a dating profile versus a professional profile.

The Percentage of Single Women Who State They Want to Earn $75K+ 10 Years From Now

<table>
<thead>
<tr>
<th>% of single women respondents:</th>
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<tbody>
<tr>
<td>In a social profile: 37.9%</td>
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<tr>
<td>In a dating profile: 43.7%</td>
</tr>
<tr>
<td>In a professional profile: 54.1%</td>
</tr>
</tbody>
</table>

Source: Hill Holliday/Origin, U.S. Single Women Study, 2018

02 Single women keep personal information about whether or not they want children to themselves, especially in a professional setting.

Only 28% of single women surveyed reported that they would choose to share in a professional profile that they eventually want children.
It's not that I'm desperate to be in a relationship right now... I look and say, I'm 38 now, oh my goodness, I don't know if I want kids, but I'm running out of time.

03 Travel is a personal priority for single women, taking precedence over marriage and having children.

Single women are 2 times more likely to rank travel as a top priority over having children.

**TEN YEARS FROM NOW, WHAT ARE YOUR PERSONAL PRIORITIES?**

The top three personal priorities for single women as noted in social, dating, and professional profiles:

<table>
<thead>
<tr>
<th>In a social profile</th>
<th>In a dating profile</th>
<th>In a professional profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>travel</td>
<td>get married</td>
<td>own my own home</td>
</tr>
<tr>
<td>get married</td>
<td>own my own home</td>
<td>travel</td>
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<tr>
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Source: Hill Holliday/Origin, U.S. Single Women Study, 2018

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SINGLE WOMEN ARE 26% less likely to rank work/life balance as their #1 priority in a professional setting vs. a dating setting.

04 Single women want work/life balance, too.

Single women surveyed consistently reported across social, dating, and professional profiles that their top professional priorities are work/life balance, career advancement, and increased income. Yet, we also found that the priority of work/life balance remains a tricky subject for single women to confront in a professional context.

**TEN YEARS FROM NOW, WHAT ARE YOUR PROFESSIONAL PRIORITIES?**

The top three professional priorities for single women as noted in social, dating, and professional profiles:

<table>
<thead>
<tr>
<th>In a social profile</th>
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</tr>
</thead>
<tbody>
<tr>
<td>work/life balance</td>
<td>get promoted</td>
<td>increase income</td>
</tr>
<tr>
<td>get promoted</td>
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Source: Hill Holliday/Origin, U.S. Single Women Study, 2018
How does self-presentation impact dating lives of single women?

We ran an A/B test with Match.com to find out. The A/B test included two profiles for a female CEO to figure out which profile would perform better.

**PROFILE A**
Mentions her title as CEO

**PROFILE B**
No mention of her title as CEO

**RESULTS**
Prospective male dates who were shown Profile A were:

**2X MORE LIKELY**
to click through to view her full profile than those who were shown Profile B.

**2X MORE LIKELY**
to “like” her profile than those who were shown Profile B.

**90% MORE LIKELY**
to send her an email than those who were shown Profile B.

**CONCLUSION**
Findings from our survey show that, when asked about professional ambitions in a dating scenario, single women downplay what it is that they want to achieve professionally. But the A/B test with Match.com proves that this tendency is more of a disservice than a benefit to boosting male dating prospects for single women. Men who were included in the A/B test indicated more interest in a woman who is ambitious and accomplished than a woman who is less career-oriented. Our message to single women seeking a male partner: own your ambition, own your accomplishments, your dating life will thank you.
THE FINANCIAL SELF

THE GAP IN FINANCIAL LITERACY VS. FINANCIAL PLANNING

Single women face a unique set of financial challenges. Life expectancies for women are longer than for men; women usually have lower household incomes; and the narrowing, but still significant, gender gap in financial literacy persists.

While financial literacy in the United States is rather low overall, it is significantly low among single women. And for these women, a gap not only exists across genders in financial literacy, but also in financial goal setting and execution. Our study found that single women, despite prioritizing financial security, are at risk to leave their financial goals unmet for a few reasons.

First, single women rank financial security as the most important milestone to hit, but at the same time, only 8% rank planning for retirement to be of equal importance. Second, our study found that 74% of single women believe that now is the most ideal time for them to build a plan with a financial advisor, yet only 20% have taken the leap to work with a financial advisor. Third, single women are unsure of how much they should be saving for retirement, putting them at risk of financial insecurity in later years.

“Both my parents have larger families. I've watched them take care of their parents. I've actually started trying to negotiate with my little cousins to take care of me when I'm older.”

Source: Hill Holliday-Origin, U.S. Single Women Focus Group Participant, 2018

WHAT TYPES OF RETIREMENT ACCOUNTS do you currently have? Select all that apply.

% of single women respondents:

Employer-provided 401(k) 77%
Self-service investment account (E-trade) 7%
Online brokerage account (Merrill Edge) 8%
Investment account with a broker (Fidelity) 26%
Other 10%

Source: Hill Holliday-Origin, U.S. Single Women Study, 2018

HOW MUCH DO YOU THINK YOU WILL NEED TO RETIRE?

% of single women respondents:

< $100K 19%
$100K - $500K 24%
$500K - $1M 37%
$1M+ 20%

Source: Hill Holliday-Origin, U.S. Single Women Study, 2018
Where do I want to be in five years? Progressing with a forward-looking company. Traveling three to four times per year. Adopting a child.

Being single in the workplace can be an undue burden or a powerful opportunity to thrive professionally. For single women in particular, it can be both. Single women may be expected to do more at work — to stay later, to pick up the slack for co-workers with children, and to keep their own desire for work/life balance to themselves.

According to Sheryl Sandberg’s *Lean In*, these expectations leave single women to feel like their personal lives have less importance, and are taken less seriously by married colleagues or those with children. Despite this, our survey found that single women think there are more pros than cons to being single in the workplace when considering opportunities for career advancement, earning potential, and work/life balance.

The opportunity for career advancement ranks as one of the most important professional priorities for single women, and in fact, for 83% of the workforce overall, it is the most important contributor to workplace satisfaction. Our survey found that only 6% of single women view being single as having a negative impact on their careers, making it encouraging for single women seeking to fulfill their professional priorities. Yet now more than ever, factors that have the greatest influence on career advancement for single women go beyond relationship status, job boards, and trainings.

A workplace environment that is safe, discrimination free, and harassment free is not just good business; it’s one of the most important factors that influences career advancement for single women, particularly in the post #MeToo and #TimesUp era. Our study revealed that workplaces still have much to do when it comes to creating environments that are conducive to career advancement: currently, 1 in 5 single women surveyed have decided not to pursue a professional opportunity because of sexual harassment, and 44% said they believe that sacrificing professional opportunities because of harassment at work happens “often.”
THE PATH FORWARD
According to the Geena Davis Institute on Gender in Media, men appear in advertising 4 times more than women and have 7 times more speaking roles. When looking closer at the women represented in advertising, only a few executions represent single women, and even fewer represent them accurately or fairly. It’s difficult to identify a single woman character that doesn’t fit neatly into a comfortable stereotype. Even iconic and beloved characters like the 1990s’ Bridget Jones (Bridget Jones’s Diary), the 2000s’ Carrie Bradshaw (Sex and the City) and the 2010s’ Hannah Horvath (Girls) fall victim to tired clichés that represent an outdated idea of what a single woman is — two parts helpless and desperate and one part aggressive and hostile, with a little crazy thrown in (remember Glenn Close’s Alex from Fatal Attraction?).

NEW IMPERATIVES FOR BRANDS

01 ASK YOURSELF “WHO ELSE IS THERE?”
Re-focusing your target audience(s) lets you take a step back to look at your brand, current customers, and aspirational customers. Perhaps your target audience has changed or your product use-case has evolved. Appealing towards new audiences means including them in messaging, casting, context, and beyond.

02 IDENTIFY UNREALIZED OPPORTUNITIES
There lies an incredible first-mover’s advantage for brands in crowded categories to connect with single women, especially in categories where single women have readily raised their hands. As found through our survey, travel ranks as the top personal priority for single women. At the same time, financial security ranked as one of the top life milestones for single women. This leaves the door wide open for travel brands and financial services brands to curate content, offerings, and experiences that engage single women.

03 ELEVATE BRAND EXPERIENCES FOR SINGLE WOMEN
Design a frictionless brand experience that acknowledges and respects single women in a modern way. Ask yourself if your marketing, packaging, or products discriminate against consumers based on marital status or life stage aspirations. Identify and empower diverse voices and perspectives in your organization that can provide checks and balances on strategy, approach, and tone when targeting specific audiences.

04 LISTEN, ENGAGE, LEARN
Adult women in the United States make up roughly 12% of our population, but many brands pursuing this audience of consumers forget these two things: 1. Not all adult women are married; and 2. Not all adult women have children. Much of today’s marketing tends to be family-centric or mommy-centric, leaving out a diverse and growing audience of single women. Just listening to and engaging with single women is a start to gaining ground and favor with this audience.
I get a lot from married people who are like, "Don't worry...Mr. Right will come along." Without me actually provoking that sort of sympathy...

CONCLUSION

Marketers still have work to do when engaging single women in messaging. Single women over 35 who participated in the survey could barely recall seeing themselves accurately represented in advertising at all. In our qualitative research, women agreed that non-representation has largely been the case for single women, with the exception of the De Beers campaign from the early 2000s aimed at the modern independent woman, featuring the slogan “Women of the world, raise your right hand.”

There’s an exciting opportunity right now for brands to portray single women differently, and to acknowledge their independence and ambition in an authentic, accurate way. Single women are not tied to the kitchen, nor are they tied to the office, pulling up the slack for everyone else. And they are not sitting around and waiting for Mr. Right. They are buying homes, cars, and jewelry, and planning vacations for themselves. They are preparing for retirement, going back to school, and investing. Yet many of these industries may be taking too long to catch up with them, both in the services they offer and in how they talk to single women in their advertising.

Marketers who adapt accordingly — and quickly — can capitalize on the abundant opportunity within this growing and influential consumer segment.
ABOUT

HILL HOLLIDAY
Fighting the daily share battle in the noisiest categories. It’s what we do. Hill Holliday is proud to be one of the top creative marketing agencies in the country, with over 600 employees across our network. Since 1968, we’ve built our business on winning that daily share battle for our clients in the noisiest and most competitive categories. Blending superior creative, media, and technology, we deliver game-changing ideas for industry leaders like Bank of America, Dunkin’ Donuts, Planet Fitness, Tempur Sealy International, Calvin Klein, Party City, Great Wolf Lodge, Capella University, Novartis, Johnson & Johnson, Simple Mobile, Optum, Frontier Communications, and Smuckers. For more about our people, our work, and our culture, please visit http://www.hhcc.com.

TRILIA
Trilia is the full-service media agency of Hill Holliday, focused on science, ideas, and outcomes. It’s a deceptively simple formula: science + ideas = better outcomes. But the simplicity masks the tricky part. Knowing how to use the science and developing creative ideas that challenge the conventions is what we do. We live at the nexus of these two variables and our mission is to never rest on our laurels, never be completely satisfied, and remember that media excellence is achieved by learning from the past but always looking beyond the horizon. Trilia’s clients include Santander Bank, Capella University, Partners HealthCare, Planet Fitness, Great Wolf Lodge, Dunkin’ Donuts, Party City, Frontier Communications, and Tempur Sealy International. For more about Trilia, please visit http://www.triliamedia.com.

ORIGIN
Origin is a market research company specializing in applied psychological and data sciences, owned by Hill Holliday. Staffed by survey methodologists, consumer psychologists, and data strategists, Origin brings a rigorous set of methods to help solve any business challenge. While Origin has a strong foundation in traditional market research methods, they are also pioneering new analytics techniques that merge market research with machine learning and pattern recognition tools. This allows Origin to augment any survey research with additional data sources to help triangulate deeper and more powerful insights. Origin’s clients include Calvin Klein, Dunkin’ Donuts, Bank of America, Planet Fitness, Party City, Great Wolf Lodge, Viveve, Tufts Dental, Strayer, Agio Cigars, and Monro. To find out more, visit us at www.origincbi.com.

TO FIND OUT MORE, CONTACT:
Austin Gardner-Smith, SVP, Growth, Hill Holliday
austin.gardnersmith@hhcc.com

People think that you’re a loser, you’re hard to get along with, you’re selfish...you’re too fat, too independent, too loud, too whatever, all this stuff that people say...who cares, whatever, someone’s always gonna hate on you.

ALL THE SINGLE LADIES: REACHING THE MODERN INDEPENDENT WOMAN

Source: Hill Holliday/Origin, U.S. Single Women Focus Group, 2018