

## Marketing to European Men

### A short extract from an nVision Europe report

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## Introduction

### **Analysing change and variation in men's lives, identities, and role in consumption across Europe**

Marketing on the basis of gender is a problem these days. The easy assumptions about lifestyle and identity that have hitherto underpinned marketing to men are ever more in question. Across Europe, men's employment patterns, domestic lives, and their roles as consumers are changing – but at different rates and with different cultural dynamics and outcomes.

In various ways, masculinity is no longer being taken for granted now, but is self-consciously embraced if at all, widely debated and constantly re-conceptualised. The concept of masculinity is being scrubbed down, buffed up, and set to work in a new economy, and a new domestic economy.

But even in the most gender-equal economies of Europe, we find differences in men's attitudes and habits as consumers. And important continuities remain in men's lives. Most notably, the same fundamental project, the role of provider in the household, though increasingly often a shared responsibility, still unites the great majority of European men. The greater share of domestic work and everyday consumption still lies with women in most of Europe.

Despite these provisos, it is change itself that will be the leitmotif of this analysis – in the re-negotiation of domestic work and parenting roles in households, the re-shaping of masculinity in a mixed-gender service-orientated economy and increasingly 'networked' societies, and the re-distribution of power in consumption choices themselves.

Understanding where different communities of men are at, in this process of change, is the crucial detail we take on here. Generational difference is obviously profound, as are national differences, as waves of social and economic change wash across the now vast European Union. Indeed, national differences tends to put gender difference in the shade when it comes to ideas about gender and attitudes in general. We could not attempt to capture all the fascinating qualitative nuances of masculinity in the different cultures of Europe here, but we do aim to provide an evidence-based overview of the key questions in marketing to European men today.

## Executive Summary

- The rate of female employment is rising in almost all countries of the old EU15, and is driving changes in the balance of earning power in households. As a result, men's involvement in domestic work, childcare, and routine consumption choices is increasing.
- However, in countries where female employment rates are highest, there is little evidence of further change in gender roles during the last 10-15 years. In these countries, we do not anticipate widespread role-reversal. Almost everywhere in the EU25, women's educational attainment is higher than men, and this will continue to drive significant changes in gender roles toward greater equality.
- The most gender equal countries of Europe in terms of employment rates also tend to be the most gender equal in terms of the distribution of domestic work and use of leisure time. Men tend to dedicate more of their free time to media consumption and sports, but socialising and parenthood are also important dimensions of men's lives. National variations are more pronounced than gender variations in these areas.
- Our analysis of total (paid and unpaid/domestic) working hours suggests that men are only doing an equal share of total work in Sweden and the UK – elsewhere in Europe men are contributing slightly less, and in eastern Europe around 12% less in terms of total work hours.
- 'Traditional' attitudes to gender roles vary widely across Europe, with traditional roles widely endorsed in Eastern Europe, and most likely to be rejected in Scandinavia. A similar pattern of findings is found in regard to tolerance of homosexuality, although the southern countries of the EU15 are less tolerant than those in the north.
- Men's concern with appearance also follows the same pattern – perhaps surprisingly, it tends to be countries with illiberal attitudes to gender and sexuality that also express higher concern with appearance overall, and men are no exception in these 'appearance-focused' cultures.
- Attitudes to masculinity are shifting, and despite the existence of some fairly 'predictable' differences, there is little concrete evidence that there are any particular attitudes, concerns, or dispositions that are not susceptible to change in the longer term.
- Our research suggests that the balance of spending power between men and women is fairly equal across Europe, although women continue to make more individual brand choices because of their greater control of grocery choices. The majority of couples across Europe have an equal say in major purchasing decisions.
- Men tend to report lower enjoyment of high street shopping, and are currently twice as likely as women to engage in e-commerce in many European countries. This said, we expect the heavy male bias in internet use to become gradually less pronounced.

- In almost all European countries studied, men emerge as somewhat more reliant on brands than women. On the whole, European men are more likely to feel that a well-known brand is a guarantee of quality, and to say that they 'looked out for particular brands' on their last shopping trip.
- Men in countries across Europe (with some exceptions) also tend to be more likely to buy premium quality over basic quality products, and less likely to feel price-constrained when shopping.
- However, men also tend to be more likely to try to shop as quickly as possible, and to find the experience stressful. Again, this general rule does not apply in all countries, however.
- Men tend to be more cynical and less trusting as consumers, but they are not more likely to resist the influence of marketers – this relates to the fact that as less experienced consumers, they rely more on advertising and branding for assessing quality.
- Men are less likely than women to be ethically motivated consumers in every country in Europe.
- We must however continually re-assess our view of the place of men in consumption (and the attitudes associated with male consumers), because in most of Europe, gender roles will continue to change rapidly over the next decade.

## Contents

### **Part 1: Men at work**

- 1.1: Overall % of national working hours by men, by country
- 1.2: Trends in the male-female pay gap, by country
- 1.3: Male vs. female participation in higher education, by country
- 1.4: Trends in female employment rates, by country

### **Part 2: Leisure time and domestic life**

- 2.1: Media consumption (have we got hrs TV, radio, by gender?)
- 2.2: Internet use, by gender, EU
- 2.3: Sport participation, by gender, by country
- 2.4: Socialising, by gender, by country
- 2.5: Men's contribution to childcare, by country
- 2.6: Men's contribution to domestic work, by country

### **Part 3: Attitudes to gender roles, and gender identity**

- 3.1: Attitudes to gender roles, by gender by country
- 3.2: Men's concern with appearance, by country
- 3.3: Attitudes to homosexuality
- 3.4: Essentialism and gender difference in perceived necessities

### **Part 4: The Male consumer:**

- 4.1: Men's control of consumption choices, by country
- 4.2: Men's control of consumption choices, by sector
- 4.3: Gender and frequency of leisure shopping, by country

4.4: Men and e-commerce

4.5: Men's reliance on brands, by country

4.6: Gender, brands, premium goods, and spontaneity, by country

4.7: Gender, locality, speed and stress when shopping, by country

4.8: Gender difference in involvement, by market, EU

4.9: Men's perceptions of luxury, EU

4.10: Men's attitude to marketing in general, by country

4.11: Men and ethical consumption, by country

**Conclusions and summary implications for marketers**

## Part One: Men at work

### 1.1 Overall % of national working hours by men, by country

We begin by looking at a fundamental dimension of gender difference, and one that is crucial in structuring lifestyles and roles as consumers, namely the relative contribution made by men and women in the formal (paid work) economy.

While women’s working tenure varies significantly between different countries (reflecting different working cultures, legislative structures, and consequential access to part-time or flexible working practises), their share of total national working hours varies perhaps less than one might expect.

Across EU15 countries, men account for between 52% and 57% of all paid working hours, with the exception of Luxembourg (at 60%), and the Southern European countries of Italy, Greece and Spain, where men account for a rather higher share of paid working hours (62% in each case).

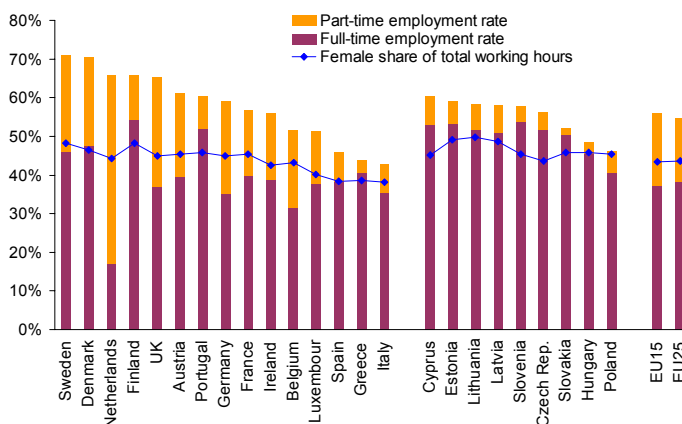
Among the new entrant countries, men’s share of total work hours shows even less variation, being between 51% (in Lithuania, the most gender-equal country of the EU25 on this measure) and 55%. The only exception is Malta (at 69%).

Overall then, we see a broad north/south divide in men’s pre-eminence in paid work hours. In Scandinavia and the Baltic, men’s share of paid work hours is very similar to women’s (although even these small differences, e.g. 53% vs. 47%, represent a notable time differential - around four hours per week). By the Mediterranean, differences are far more pronounced, and greater differences in lifestyles and roles as consumers are to be expected.

### Female employment rates and working hours across Europe, by country

#### Proportion of women working full time, and working age women’s proportion of national total working hours

\*Luxembourg figures are for 2002



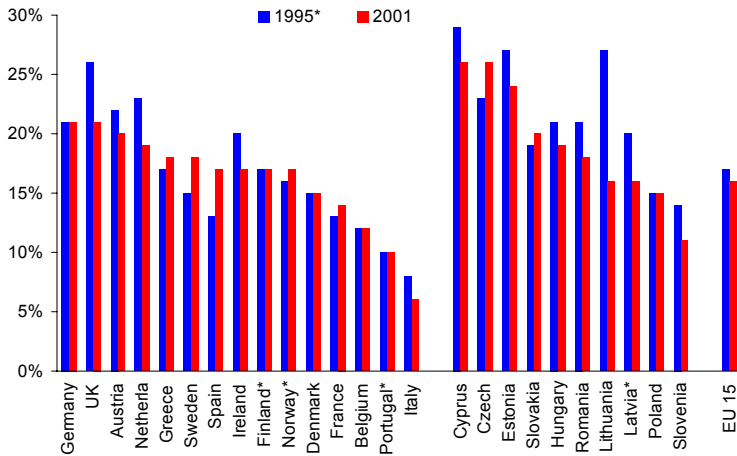
Source: Eurostat/Labour Force Survey/nVision  
Base: Women aged 15-64, 2003

## 1.2 Trends in the male-female pay gap, by country

### Gender pay gap in earnings across Europe, by country

#### Difference between average gross hourly earnings of male and female employees

Eurostat data (in unadjusted form). See explanatory notes for definition



Source: Eurostat/Labour Force Survey/nVision

Base: Paid employees aged 16-64 that are at work 15+ hours per week

Alongside differentials in working time, we must also consider the pay gap between men and women when trying to establish men's role in the formal economy, relative to that of women. The relative value of women's paid work reflects their participation in higher paid sectors of the economy, degree of seniority in the workplace, and ability to negotiate family life without suffering setbacks to careers. In countries where the economic value of men's working time is closer to that of women, we might expect a greater practical and psychological commitment to work on the part of women, and greater pressure on men to re-negotiate the balance of paid work and domestic work in households.

The chart here illustrates a massive variation in relative rates of pay for men and women, ranging between well over 20% in Cyprus, the Czech Republic and Estonia, to under 10% in Portugal, Slovenia, Malta and Italy.

It also shows that the pay gap is generally (although gradually) on the way down – across the EU, it has reduced from 17% to 16% in the 5 years between 1996 and 2001. Convergence between male and female pay rates has been most rapid in the Baltic countries, the UK, and the Netherlands.

However, in some countries, the Czech and Slovak republics, Greece, Sweden, Spain and France, the pay gap has actually widened slightly in this period. Progress towards equal earning power is thus uneven, as well as being at widely differing stages in different countries.

### 1.3 Male vs. female participation in higher education, by country

Women are spending more time in education than ever before. The trend towards greater education for women is significant and linked to later marriage, fewer children and greater affluence overall. Over the last thirty years, disparities in education attainment levels between the sexes have been reversed throughout Europe, to the extent that we now see, Europe-wide, around 6 female graduates to every five male graduates.

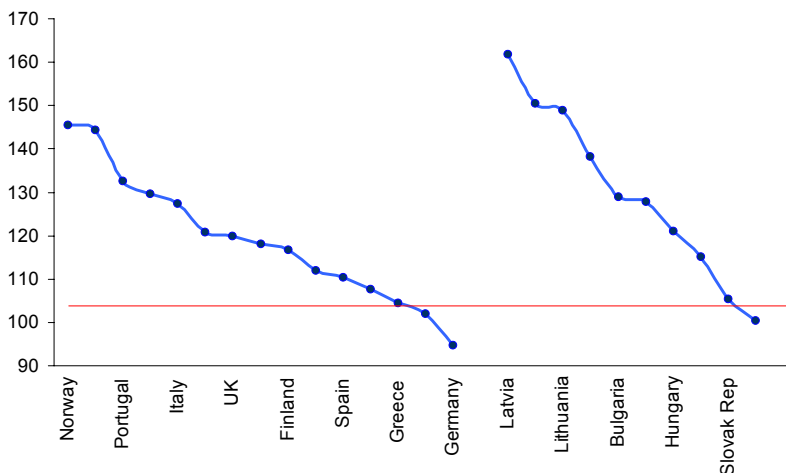
As the chart shows, there are now more women than men engaging in higher education in every country of the EU25 except Germany. The under-representation of men in higher education is most striking in Scandinavia and the Baltic states.

Given that educational attainment is closely connected to income, we might suppose, given time to filter through into the workforce of the increasingly knowledge-orientated European economy, that this will give rise to a generation in which women are not only better educated, but could also command higher earnings than men.

Without doubt, this trend is creating an expanding class of ‘professional’ women in Europe. At least where western Europe is concerned, the move of women into managerial positions is a striking (and really very recent – post-1990) phenomenon. While men’s principle role as ‘provider’ when children are young remains unchallenged as yet, and probably for the foreseeable future (see below), the fact that women’s work is ever more likely to be skilled, senior, and career-orientated, rather than just a question of ‘topping up’ household income when circumstances allow, will increase pressure on governments and businesses to assist with childcare provision and to provide flexible working options for Mothers.

#### Women’s enrolments in higher education

Women’s enrolments as a % of men’s enrolments  
Index (100 = men enrolments in each country)



Source: Eurostat/nVision 2001

## Further Contents of this Report:

- Changing employment rates in the EU 15
- Proportion of free time spent watching television, by gender within country
- E-commerce in the EU 15, by gender
- Exercising or playing sports in the EU 15 by gender
- Proportion of free time spent socialising, by gender within country
- Proportion of total childcare time contributed by men, by country
- Proportion of total domestic work time/total work time\*contributed by men, by country
- Traditional attitudes to gender roles, by gender within country
- Lack of time to spend on appearance, by country and gender
- Aspirations in EU 15
- Control of household consumption decisions in Europe
- Shopping for pleasure in selected EU countries
- Buying products or services via the internet in selected EU countries
- Importance of brand in estimating quality in Europe
- Men's shopping habits, by country
- Perception of luxury in Europe\*, by gender
- Ad resistance, by country and gender
- Ethical purchasing
- Key Implications for marketers

This is an extract from an nVision Europe report. To view the full report or to discuss the service please contact Meabh Quoirin [T. 020 7250 3343](tel:02072503343) [E. Meabh.Quoirin@nVisiononline.co.uk](mailto:Meabh.Quoirin@nVisiononline.co.uk)