

GENDER EQUALITY MATTERS 2022 :

Social norms, attitudes and practices (SNAP) of urban millennials in Indonesia, Philippines and Vietnam



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INTRODUCTION

The Investing in Women program commissioned YouGov to conduct an online **Social Norms, Attitudes and Practices (SNAP) 2022 Survey** with 6000 urban, millennial men and women (ages 18-40) across Indonesia, the Philippines and Vietnam in November 2022.

Investing in Women, an initiative of the Australian Government, catalyses inclusive economic growth through women's economic empowerment in Southeast Asia. YouGov is a global market research company offering international data and analytics that utilises a panel of 8.4 million online survey members across 40 countries worldwide.

Investing in Women includes a focus on influencing gender norms. The program works with local partners to positively shift attitudes and practices to support women in the world of work. Partners focus on shifting four key gender norms:

- Norm 1 (Childcare and Housework): Women's primary role perceived as carer for children and family members, home maker
- Norm 2 (Breadwinning and Family Income) : Men's perceived role as primary income earner/ provider for the family
- Norm 3 (Job segregation): Perceptions that certain job types are more suitable for women and others for men, leading to occupational segregation
- Norm 4 (Leadership): Perceptions of women as better in supportive roles and men as better leaders

This SNAP 2022 Survey builds upon data already gathered in the [SNAP 2020 Survey](#) and the [SNAP 2018 Survey](#) and adds specific areas of enquiry according to the norms identified above.



The SNAP 2022 Survey focused on the four norms listed above and was designed in line with the norms' framework illustrated in Diagram 1. Urban millennials were asked questions on their own **individual** attitudes and behaviours, as well as the observed **collective** attitudes and behaviours of others.

YouGov employed regression analysis to test for correlations between collective and individual attitudes and behaviours. This analysis also looked for significant differences across age, education, religion, marital, parental status and childhood experiences. The analysis also looked to identify trends in attitude and behaviour shift compared to 2018 and 2020.

YouGov also segmented all respondents into distinct attitudinal groupings on gender roles based on a classification that was determined using cluster analysis of all respondents in SNAP 2020.

Throughout this report urban millennials are identified as:

- **Traditional** - if they tend to perceive some roles as better suited to women, such as childcare and some roles better suited to men, such as leadership.
- **Progressive** – if they tend to favour equality between men and women, such as believing both men and women are equally capable of childcare and leadership, or are open to 'switched' traditional roles, such as fathers in childcare and women in leadership.
- **Neutral** - if they have some traditional views and some progressive views.

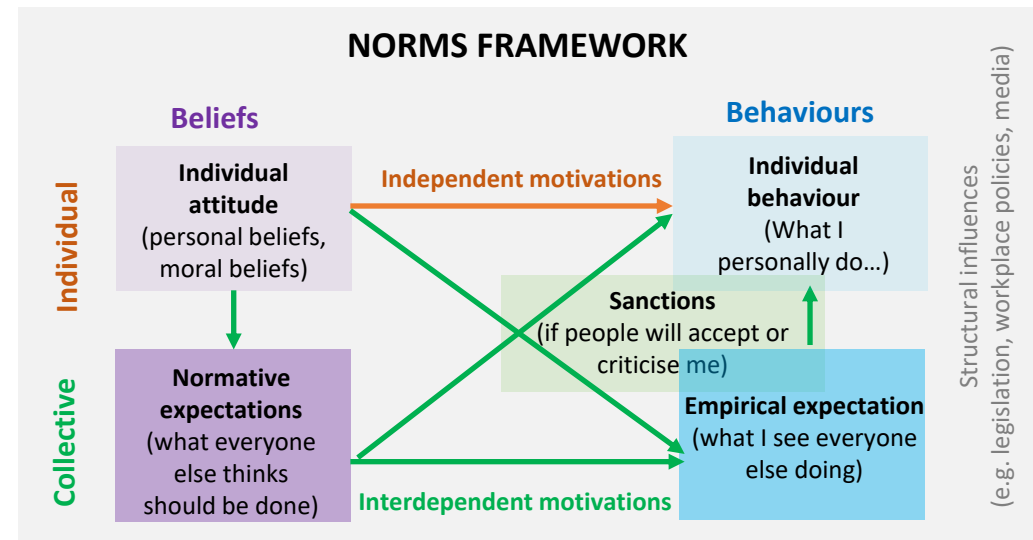


Diagram 1: Norms Framework

Understanding This Report

Statistical Significance Testing

This report presents comparisons across survey waves and between groups of interest. Comparisons were checked for statistical significance at the 95% confidence interval. Footnotes indicate where significance tests were conducted, whether or not significant differences were found.

Statistically significant differences at the 95% confidence level are noted with arrows (▲ ▼). The absence of arrows on slides where the footnote indicates significance checks were conducted indicates no significant difference between trends or groups, despite any apparent visual difference in graphical representation.

Regression Analysis

This report uses regression analysis to explore explanatory factors predicting gender norm attitudes and behaviours, as well as factors predicting the amount of domestic and earning pressure respondents faced during COVID-19. Regression models identified independent variables as predictive of the outcome variable at the 95% confidence interval, after controlling for other factors. Such factors are referenced throughout the report as being “linked,” “associated with,” and “correlated” with the desired outcome variable. These terms are used interchangeably.

Segmentation Analysis

This report uses segmentation analysis to identify distinct groups within each country and gender based on their socio-demographics, including such characteristics as parental status, employment, age, education, and religion, and based on their gender norm attitudes. The gender norm behaviours and attitudes of each group were then plotted on a scale ranging from traditional to progressive. Names were assigned based on their relative placement on these scales for each of the four gender norms. The report includes descriptions of segments, their frequency, their relative placement on the attitudinal/behavioural spectrum, and opportunities for persuading or engaging each group.

INSIGHTS



WHAT YOU SEE MATTERS

The regression analysis found that social observations matter to urban millennials.

What you see in your social circles matters

Across the four norms in Indonesia, Philippines and Vietnam, the equality or inequality of one's own attitudes is linked to* the perception of the equality or inequality of others attitudes ("what I think other people think"). Observations of others' behaviour ("what I see other people doing") are moderately linked to one's own attitudes.

Similarly, one's own behaviour is linked with the behaviour one observes in one's community. Across countries and genders, observations of more equal leadership behaviour in the community are strongly linked to one's own more equal leadership behaviour. This is also the case for more equal breadwinning behaviour for women in Indonesia and Vietnam. Observations of more equal caregiving behaviour in the community link to more equal personal behaviour on this norm for men and women in Indonesia and for men in the Philippines. Urban millennials' own attitudes were rarely significantly linked to their own behaviour, except for Philippine men on caregiving and women on breadwinning. See the diagram on the following page which explains this further.

What you saw growing up matters

Urban millennials who witnessed their parents equally sharing childcare and/or breadwinning when they were growing up are more likely to practice childcare and breadwinning equality in their own home. Typically, parental modelling links with more equal breadwinning for men and more equal caregiving for women (but in Indonesia, it links with more equal caregiving for men and not women). For Vietnamese millennial women who saw parents practice equality, they are not only more likely to practice equality in their home but also at work in their job segregation and leadership behaviours (women in Indonesia also show a linkage between parental modelling and leadership behaviour). Across countries, a father sharing equal caregiving, links with more progressive behaviour across a greater number of gender norms than a mother who models equal breadwinning.

What you see in media matters

Millennials were asked about the media they consume online and through television, radio and print. Watching progressive media – that is media where women and men are equally seen taking care of children, doing housework and in leadership roles at work – correlates with more equal behaviour for men and women across all gender norms except caregiving in Vietnam, and for all gender norms except breadwinning in the Philippines. In Indonesia, it correlates with more equal behaviour on caregiving and leadership norms for men and women, and breadwinning and job segregation for men. Across countries, progressive representations of work-related gender roles tend to link with progressive behaviour more frequently than home-related gender roles, especially for men.



The regression analysis on the survey data tested what influences individual urban millennial behaviour – the ‘I do’ in the Diagram 2 below. The same regression analysis was conducted in SNAP 2020 and SNAP 2022 and the main correlates remained stable in 2020 and 2022, despite differences in significance levels of some socio-demographic control variables. The key findings of the regression analysis in both waves are consistent.

There were rarely links found between what ‘I think’ leading to what ‘I do’. The strongest links to what ‘I do’ were what ‘others do’. What was seen in the media was also a strong influencer on what ‘I do’.

If urban millennials in Indonesia, the Philippines and Vietnam are going to embrace gender equality, they will need to see others – from their social circles and in the media – embracing gender equality too.

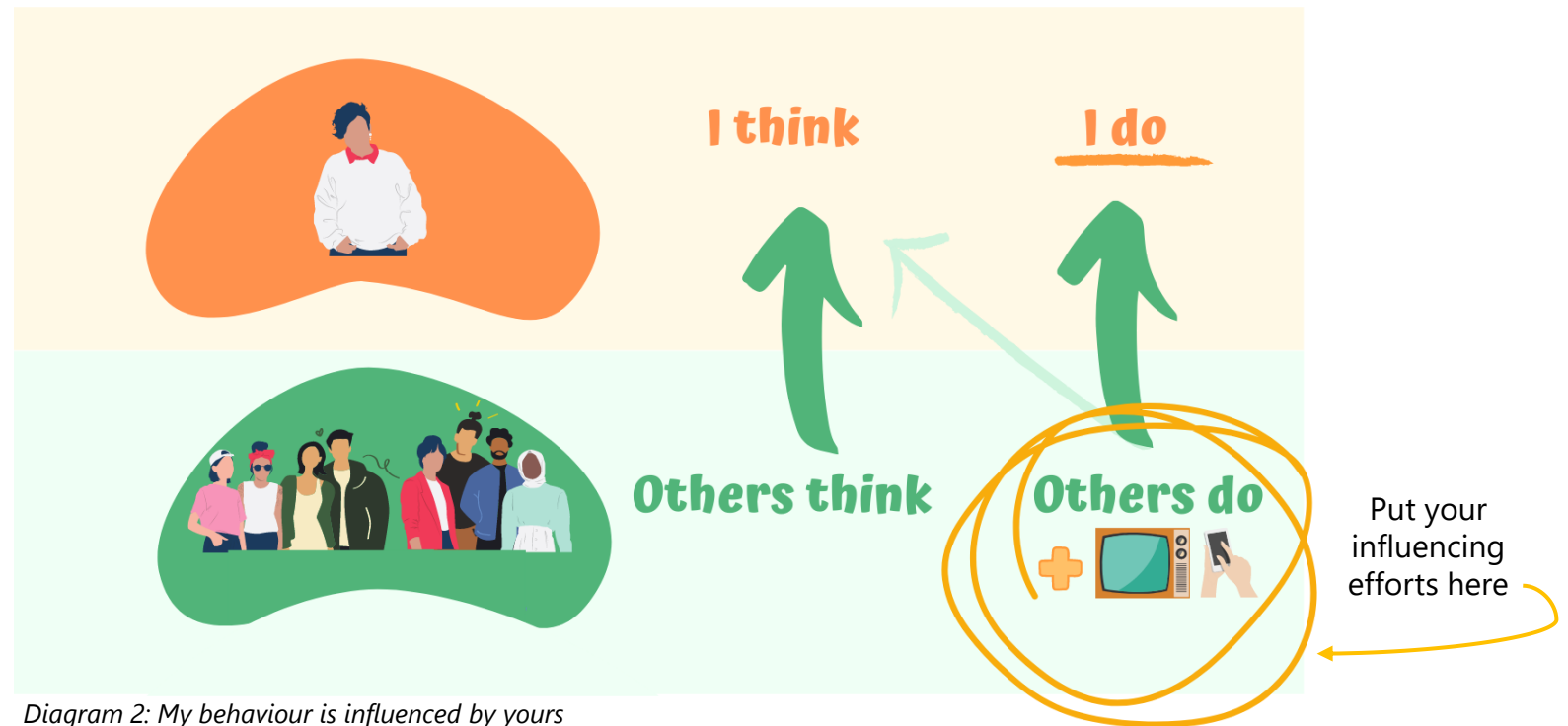








Diagram 2: My behaviour is influenced by yours



2018-2022 TRENDS: CAREGIVING



												
	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022
Women are best at looking after children	▲	◄	▲	◄	◄	▲	▲	◄	▲	◄	◄	◄
Women are best at looking after dependent adults	◄	▼	◄	◄	◄	◄	▲	◄	▲	◄	◄	◄
Childcare is a woman's responsibility	-	▼	-	◄	-	◄	-	▼	-	◄	-	▼
Content with partner doing most of the childcare (men) Content with doing most of the childcare (women)	▲	◄	◄	◄	◄	◄	▼	◄	◄	◄	◄	◄
I do most of the childcare in my own home	-	◄	-	◄	-	◄	-	◄	-	◄	-	◄







Key:

- ▲ Increase over time
- ▼ Decrease over time
- ◄ Stable over time
- Positive movement for equality
- Negative movement for equality
- Attitude
- Behaviour

* See the [Detailed Annexes - Social Norms, Attitudes and Practices \(SNAP\) 2022 Survey Indonesia, Philippines, and Vietnam](#) for a detailed comparison of 2018, 2020, and 2022 variables and analysis of similarities and differences across waves. Differences should be interpreted as directional, not as exact changes. Notable differences in question wording exist, particularly in questions about gender expectations for women looking after children and dependent adults.

2018-2022 TRENDS: BREADWINNING AND WORK NORMS



													
		2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022	2018-2020	2020-2022
FAMILY INCOME	Earning income is a man's responsibility	-	▲	-	◄	-	▲	-	◄	-	◄	-	◄
	My partner earns same amount as me	◄	◄	▲	◄	▲	◄	◄	▼	▲	◄	▲	◄
JOB SEGREGATION	Some work roles are better suited to men	-	▲	-	▲	-	▲	-	▲	-	▲	-	▲
	More men in own workplace	-	◄	-	◄	-	◄	-	▼	-	◄	-	◄
LEADERSHIP	Men are better suited to leadership positions	-	▲	-	◄	-	◄	-	◄	-	▼	-	▼
	More male leaders in own workplace	-	◄	-	◄	-	◄	-	◄	-	◄	-	▼

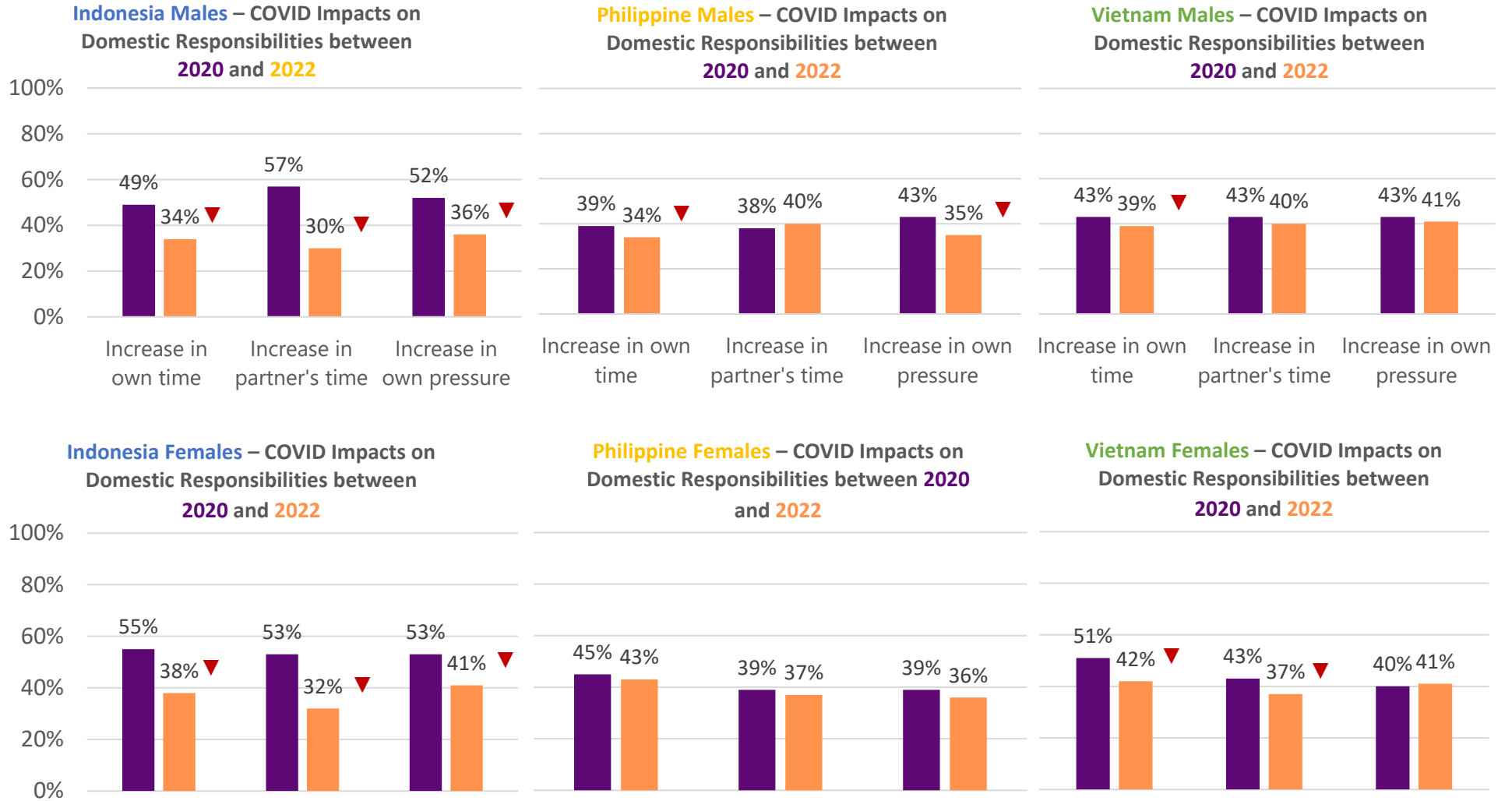
Key:

- ▲
Increase over time
- ▼
Decrease over time
- ◄
Stable over time
- Positive movement for equality
- Negative movement for equality
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- Behaviour

* See the *Detailed Annexes - Social Norms, Attitudes and Practices (SNAP) 2022 Survey Indonesia, Philippines, and Vietnam* for a detailed comparison of 2018, 2020, and 2022 variables and analysis of similarities and differences across waves. Differences should be interpreted as directional, not as exact changes. Notable differences in question wording exist, particularly in questions about gender expectations for women looking after children and dependent adults.

COVID-related household pressure:

In 2022, all countries and genders except Philippine women are less likely to report an increase in household work due to COVID compared to 2020. Men and women appear to have accurate assessments of the impact of COVID on the household work their partners do, compared to 2020 when Vietnamese and Philippine men underestimated their partners' work. The amount of COVID-related pressure to take care of the household is down most dramatically in Indonesia compared to 2020.



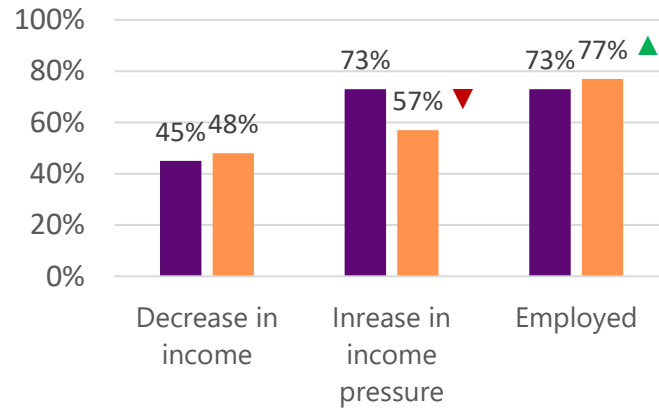
Charts: Increased domestic responsibilities and pressure for Indonesian, Philippine, and Vietnamese millennials and their partners due to COVID impacts, categorized by survey wave. ▲ ▼ Indicate significance at 95% C.I.



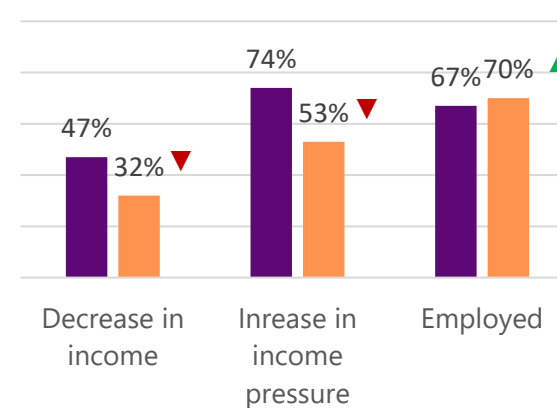
COVID-related income pressure:

In 2022, fewer Philippine and Vietnamese men and women report decreases in income due to COVID compared to pre-pandemic times than they did in 2020. The the percent reporting a decrease in Indonesia is the same as in 2020. COVID-related income pressure is down compared to 2020 among men and women in Indonesia and the Philippines, but not in Vietnam.

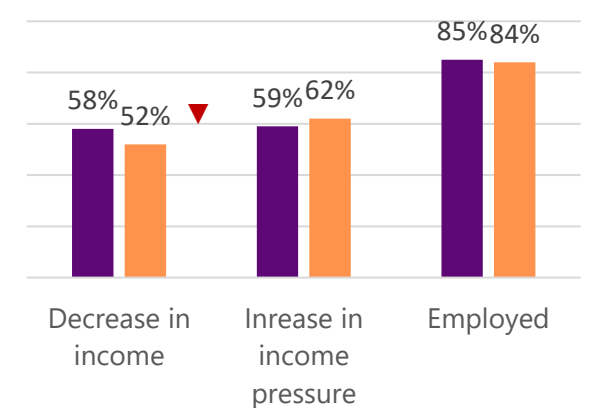
Indonesia Males – COVID Impacts on Income between 2020 and 2022



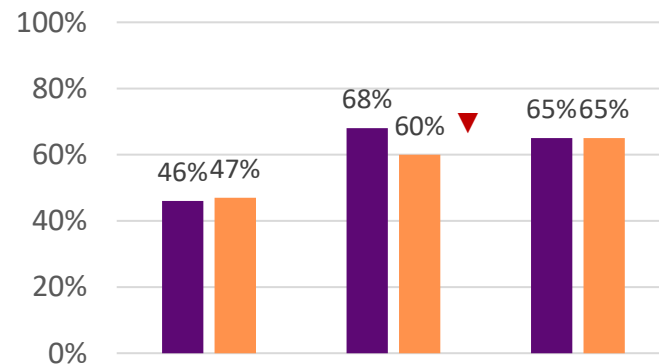
Philippine Males – COVID Impacts on Income between 2020 and 2022



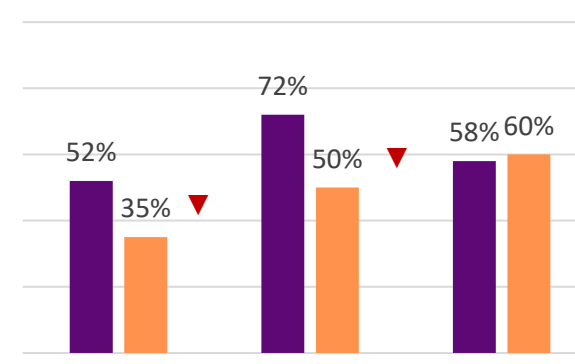
Vietnam Males – COVID Impacts on Income between 2020 and 2022



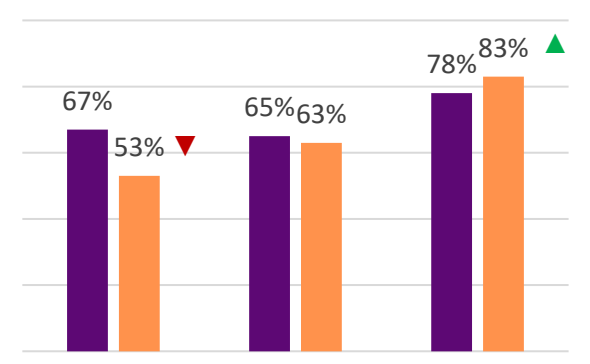
Indonesia Females – COVID Impacts on Income between 2020 and 2022



Philippine Females – COVID Impacts on Income between 2020 and 2022



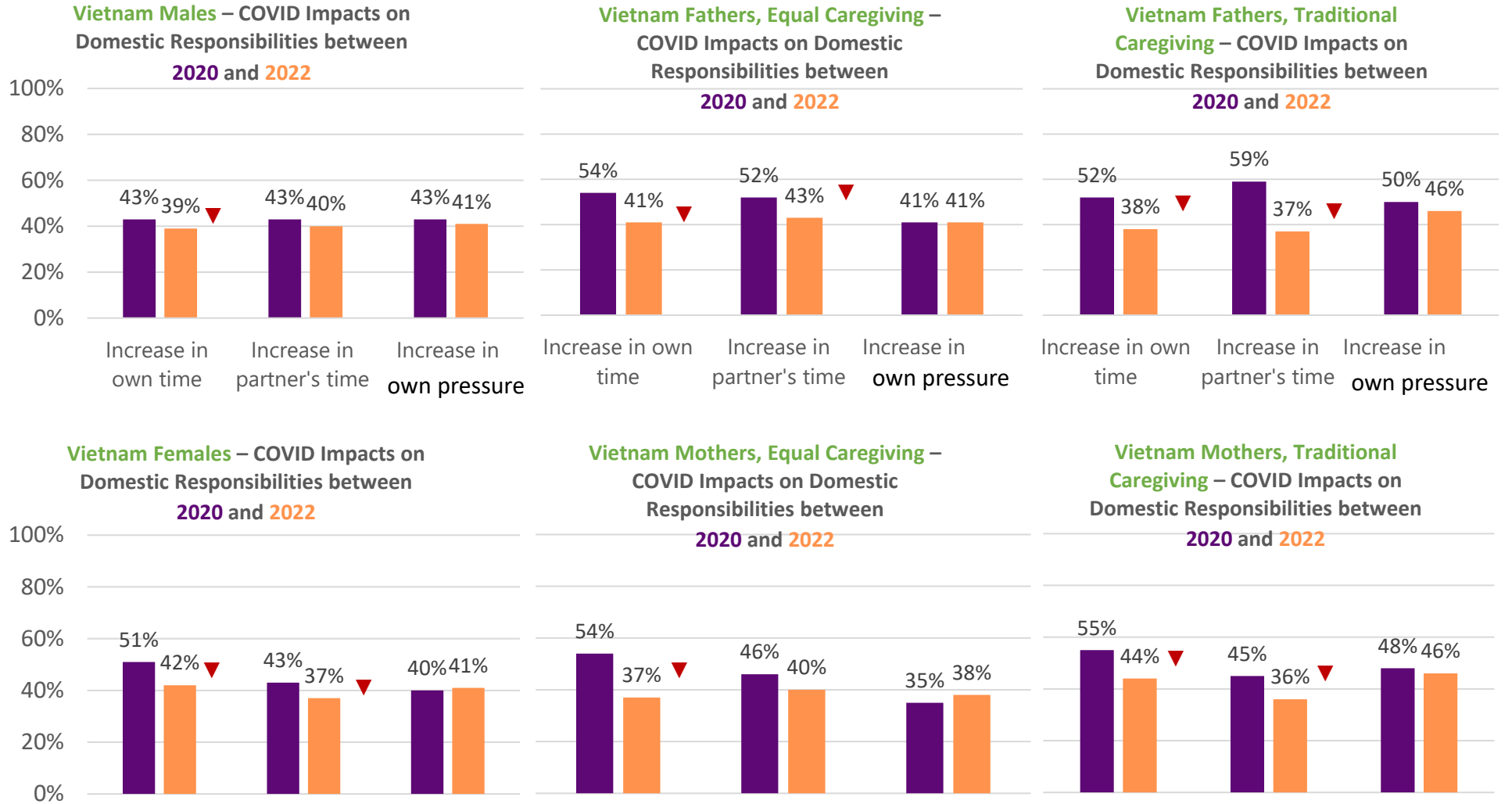
Vietnam Females – COVID Impacts on Income between 2020 and 2022



Charts: Financial impact, financial pressure, and employment level for Indonesian, Philippine, and Vietnamese millennials due to COVID impacts, categorized by survey wave. ▲ ▼ Indicate significance at 95% C.I.

Gender roles and COVID-related household pressure in Vietnam:

In Vietnam, the amount of extra time spent on domestic duties due to COVID is down across genders and caregiving arrangements. In 2022, as in 2020, mothers and fathers with traditional caregiving arrangements tend to feel more COVID-related pressure to do domestic work compared to those with equal arrangements.



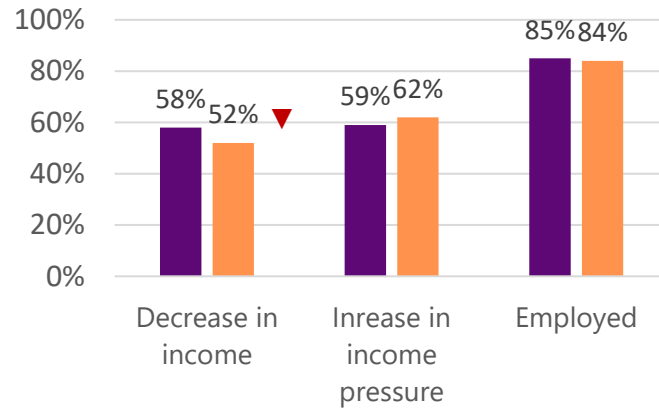
Charts: Increased domestic responsibilities and pressure Vietnamese millennials and their partners due to COVID impacts, categorized by survey wave.

▲ ▼ Indicate significance at 95% C.I.

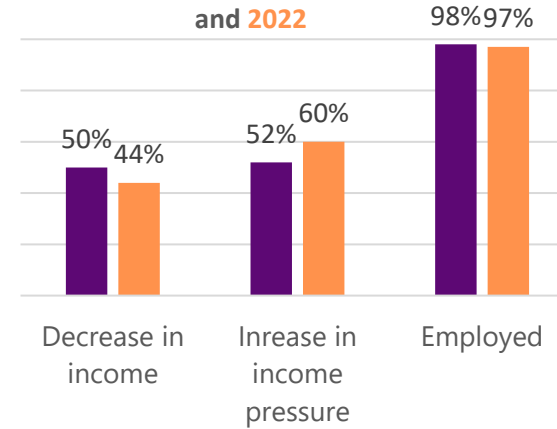
Gender roles and COVID-related income pressure in Vietnam:

In Vietnam, men and women are less likely to report a decrease in income due to COVID in 2022 compared to 2020, though employed women in traditional breadwinning arrangements are still as likely to report a decline. Female workers with equal breadwinning arrangements report higher pressure as income earners in 2022 than they did in 2020.

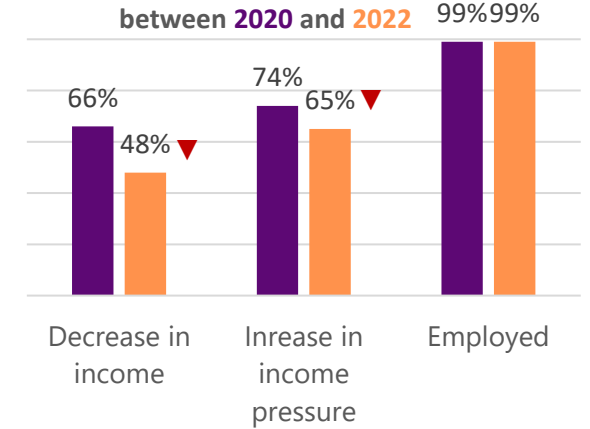
Vietnam Males – COVID Impacts on Income between 2020 and 2022



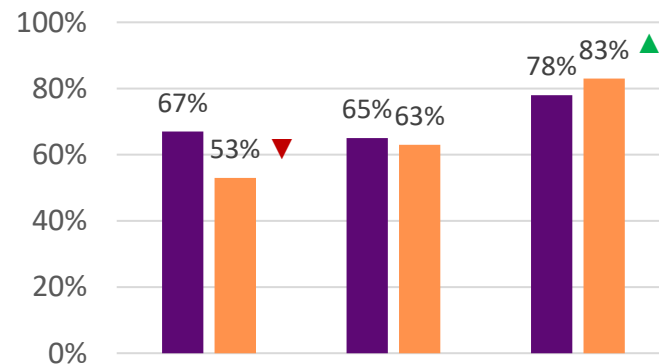
Vietnam Fathers, Equal Breadwinning – COVID Impacts on Income between 2020 and 2022



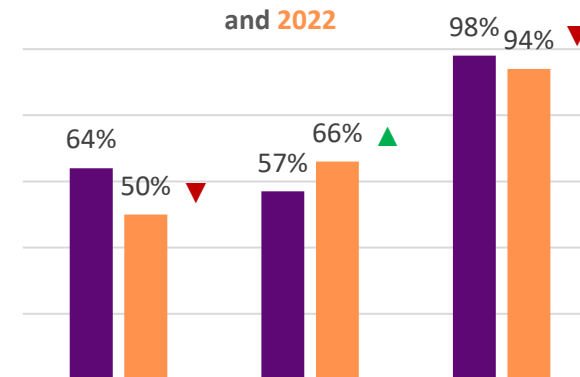
Vietnam Fathers, Traditional Breadwinning – COVID Impacts on Income between 2020 and 2022



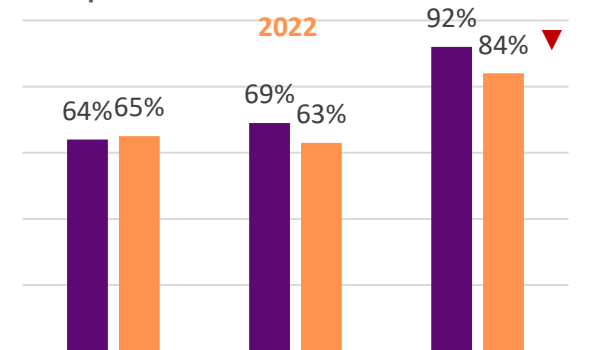
Vietnam Females – COVID Impacts on Income between 2020 and 2022



Vietnam Mothers, Equal Breadwinning – COVID Impacts on Income between 2020 and 2022



Vietnam Mothers (employed), Traditional Breadwinning – COVID Impacts on Income between 2020 and 2022



Charts: Financial impact, financial pressure, and employment level for Vietnamese millennials due to COVID impacts, categorized by survey wave.

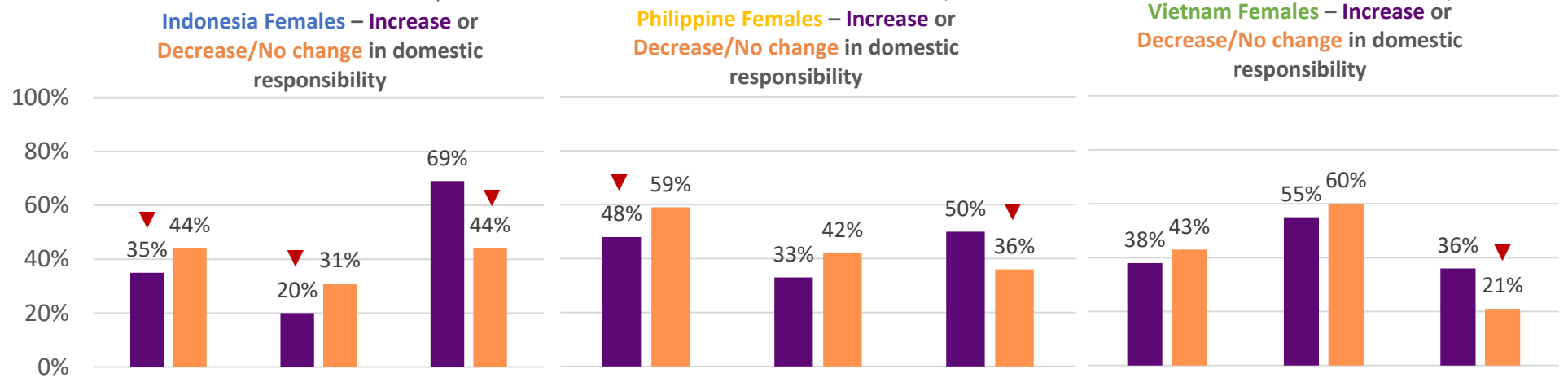
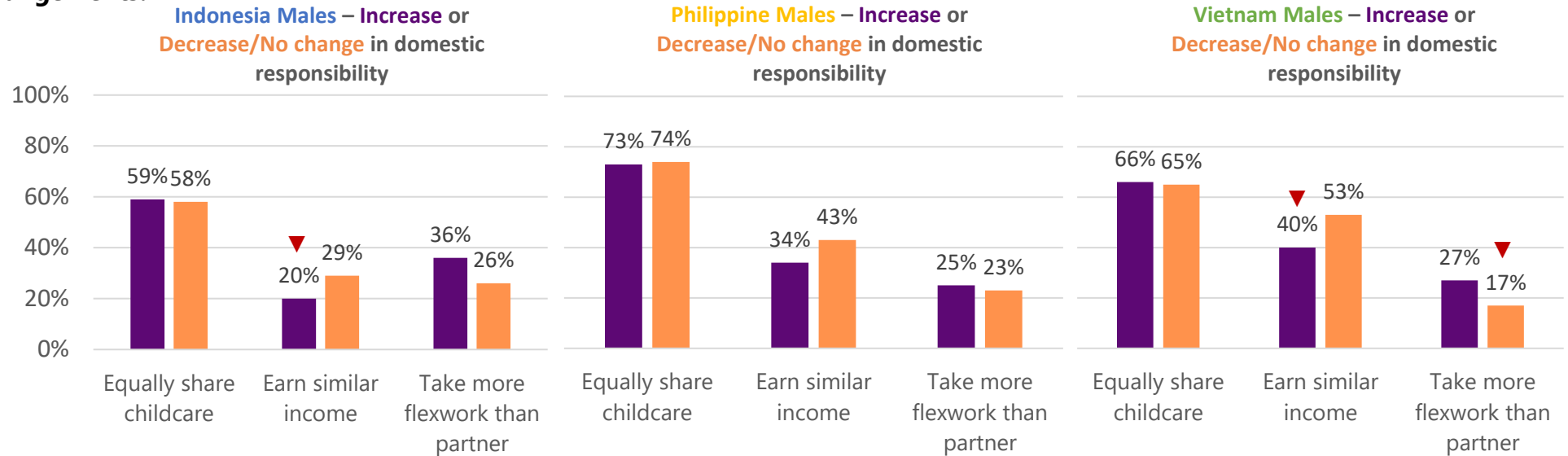
▲ ▼ Indicate significance at 95% C.I.



Increase/
decrease in
domestic
responsibility
related to COVID
and its effects on
childcare,
breadwinning,
and flexwork:



Experiences differ between those who spend more time on domestic responsibilities as a result of COVID and those who had no change or a decrease in responsibility. Across countries, working women who took on more domestic responsibility show an increased chance of being the partner who takes more flexwork. In the Philippines and Indonesia, they are also less likely than those who did not take on more work to have equal caregiving arrangements. Additionally in Indonesia, they are less likely to have equal breadwinning arrangements.



Charts: The effects changes in domestic responsibilities for Indonesian, Philippine, and Vietnamese millennials and their partners have on their childcare, breadwinning, and taking flexwork. ▲▼ Indicate significance at 95% C.I.

Promotion and senior management ambition before and after the COVID outbreak:



Since COVID, workplace ambitions are unchanged for men and women in the Philippines, diminished for men and women in Indonesia, and diminished for women only in Vietnam.



MEN



WOMEN

Are you hoping to be promoted in the next 24 months?

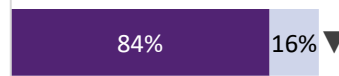
Indonesia



2018



2022



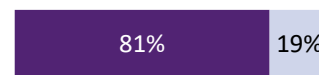
Philippines



2018



2022



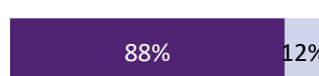
Vietnam



2018



2022



Agree Disagree



MEN



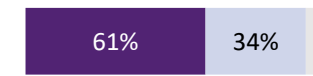
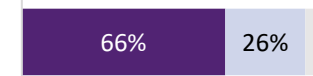
WOMEN

Are you ambitious to receive a senior management role in your company?

2018



2022



2018



2022



2018



2022



Agree Disagree Already in a management position

▲▼ Indicate significance across time periods at 95% C.I.

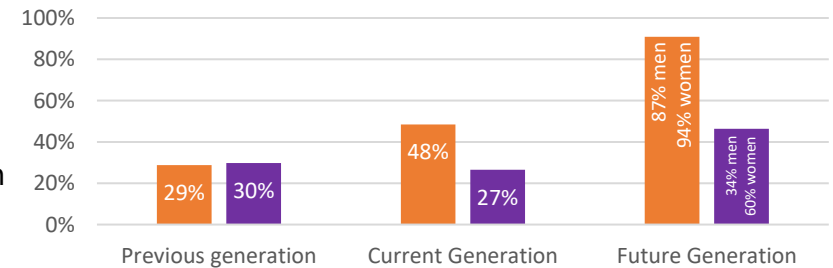
GENDER EQUALITY AT HOME ON THE RISE

Trends remained stable across 2020 and 2022. Childcare and breadwinning is more equally shared from one generation to the next.

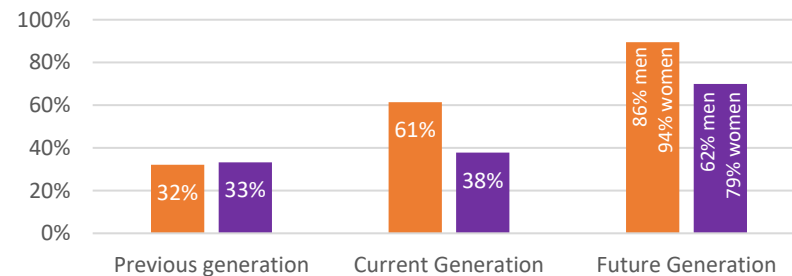
Millennials were asked if their parents shared childcare and breadwinning when they were growing up (represented as 'previous generation' in the graphs below). When this is compared to the 'current generation' of sharing between couples and parents with children at home, sharing has increased. The 'future generation' of urban millennials who don't have partners or children yet were asked what they hope to do if they have a partner and

children in the future. The number urban millennials who would like to share roles with their partner grows impressively, especially for childcare with over 8 in 10 men and 9 in 10 women in Indonesia, Philippines and Vietnam aspiring to equally share childcare with their partner. A similar pattern holds for breadwinning, though the generational differences are not as pronounced, and current parents in Indonesia are actually less likely than their parents to share equally with their partners. As was the case in 2020, men of the future generation appear to hold themselves back when it comes to equality aspirations with breadwinning compared to women.

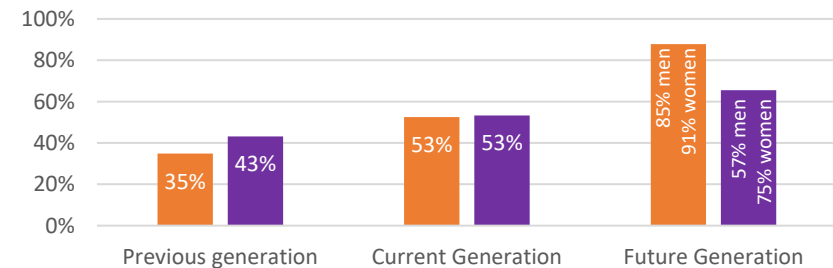
Indonesia - Sharing childcare and breadwinning equally



Philippines - Sharing childcare and breadwinning equally



Vietnam - Sharing childcare and breadwinning equally



Charts: % of SNAP III respondents reporting equal caregiving and breadwinning in their families of origin by age group.

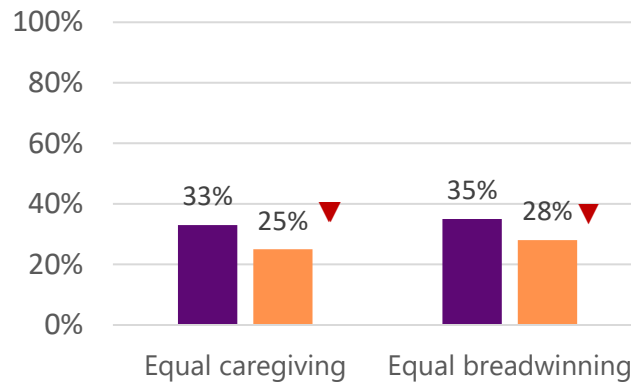
▲ ▼ Indicate significance at 95% C.I.



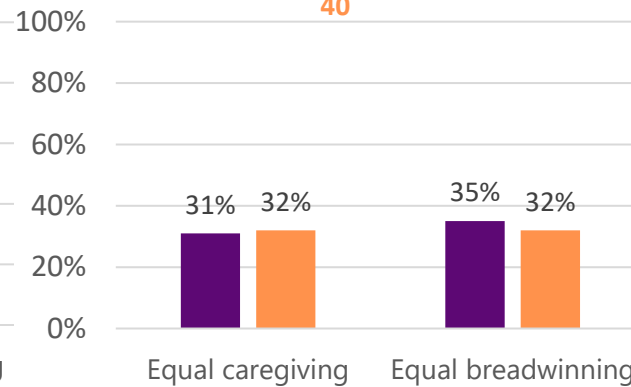
PROMISING SHIFTS IN PARENTAL MODELLING

Regression analysis establishes the importance of parental modelling of equal gender roles in influencing more equal behaviour across domestic and work-related gender norms. Parental modelling of fathers equally sharing caregiving is significantly linked with more equal behaviour on one or more norms in all three countries, and parental modelling of mothers sharing equal breadwinning is significantly linked with more equal behaviour on one or more norms in Indonesia and Vietnam. Survey data finds that 18-24 year olds are significantly more likely than those over 25 to observe parental modelling of caregiving and breadwinning in Indonesia and of caregiving in Vietnam. This suggests that generational shifts may create a virtuous loop of more non-traditional behaviour on gender norms in these countries, as future generations of parents are more likely to have experience with equal gender norms in their families of origin.

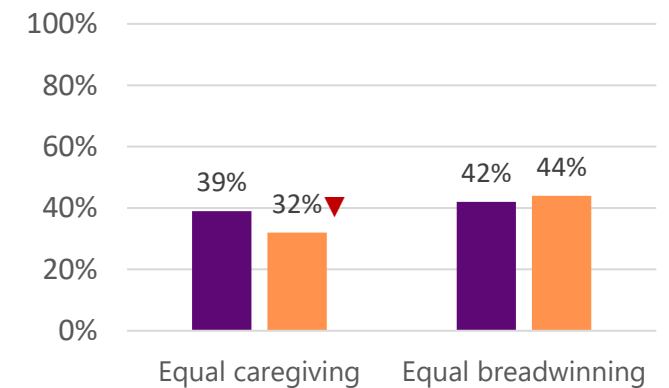
Indonesia – Parental Modelling of Equal Gender Roles, Ages 18-24 and 25-40



Philippines – Parental Modelling of Equal Gender Roles, Ages 18-24 and 25-40



Vietnam – Parental Modelling of Equal Gender Roles, Ages 18-24 and 25-40



Charts: % of SNAP III respondents reporting equal caregiving and breadwinning in their families of origin by age group.
▲ ▼ Indicate significance at 95% C.I.



LEADERSHIP AND JOB SEGREGATION BEHAVIOUR TRENDING STABLE OR MORE EQUAL

Regression analysis shows a strong correlation between what people see around them and their personal attitudes on gender norms, across countries and across genders. This is also the case on the leadership and job segregation norms. What people see around them also correlates with how people behave on the leadership norm.

2022 data paints a promising picture for behaviour on the leadership norm. As in 2020, all countries show a correlation between individuals working in jobs where the leadership reflects more equal or progressive gender roles and sharing such attitudes on gender in leadership.

For the leadership norm, attitudes, observed behaviour, and personal behaviour are stable or trending more equal or progressive in all countries and for all genders except among Indonesian and Vietnamese males. For Indonesian males, personal attitude and behaviour observed in one's community are both trending in a less equal direction in 2022 compared to 2020. For Vietnamese males, personal behaviour on the leadership norm is trending toward lower equality.

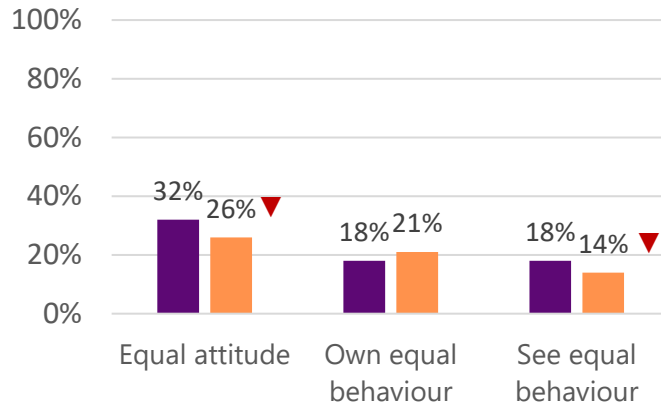
The picture on the job segregation norm is more mixed. Attitudes and job segregation behaviour observed in the community are trending toward lesser equality in all countries and for all genders, except that Philippine women see the same amount of job segregation in their community as they did in 2020. Luckily, regression analysis finds that personal behaviour appears uncoupled from attitudes and behaviour observed among others on the job segregation norm. Personal behaviour on job segregation is either stable (among Indonesian men and women and Vietnamese men) or trending toward greater equality (among Philippine men and women and Vietnamese females).



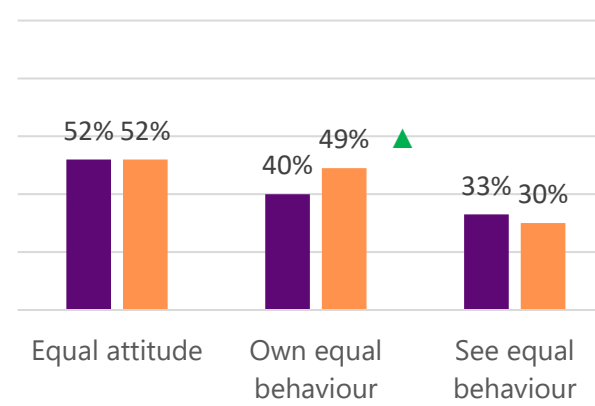
Leadership trends:

On the leadership norm, personal behaviour is stable or trending more equal in all countries and genders except among Vietnamese males. Regression analysis finds that observing more equal behaviour among others links with more equal personal behaviour, and this too is stable everywhere but among Indonesian males, where it declined since 2020.

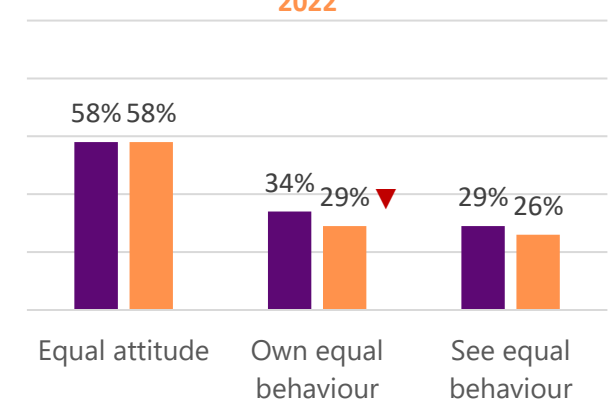
Indonesia Males – Leadership Attitudes and Behaviours between 2020 and 2022



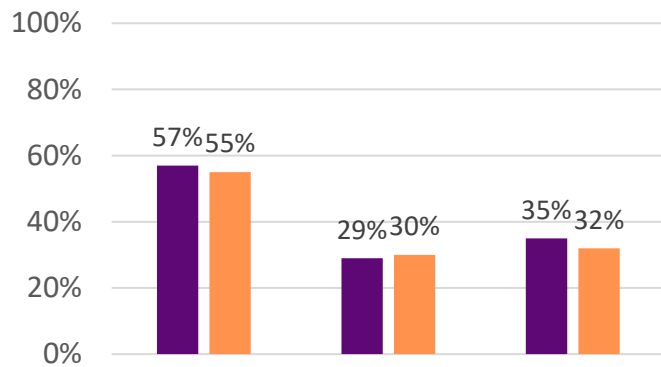
Philippine Males – Leadership Attitudes and Behaviours between 2020 and 2022



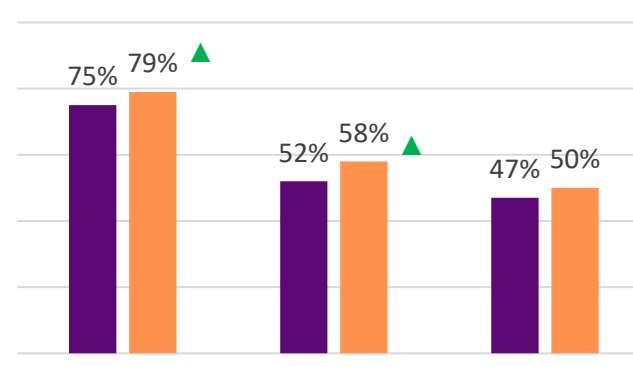
Vietnam Males – Leadership Attitudes and Behaviours between 2020 and 2022



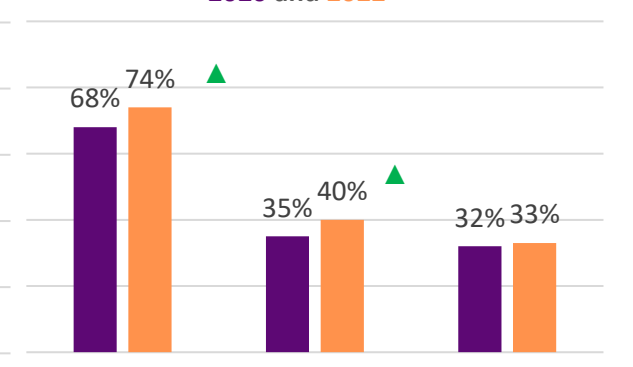
Indonesia Females – Leadership Attitudes and Behaviours between 2020 and 2022



Philippine Females – Leadership Attitudes and Behaviours between 2020 and 2022



Vietnam Females – Leadership Attitudes and Behaviours between 2020 and 2022

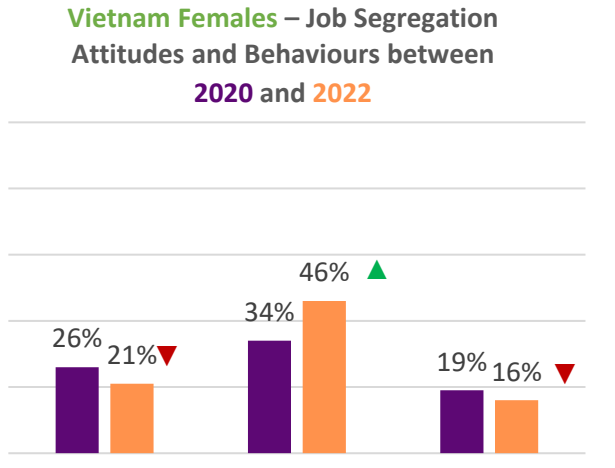
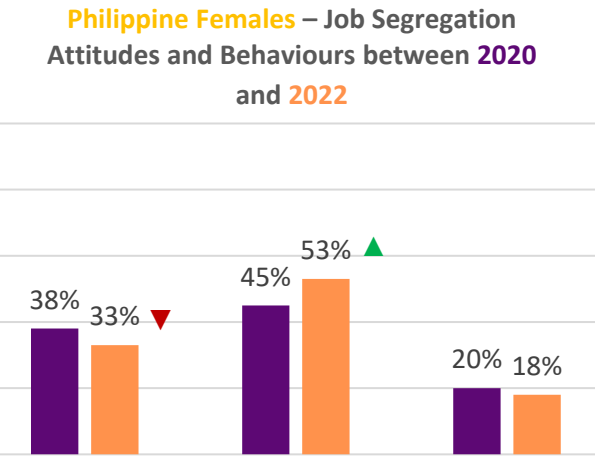
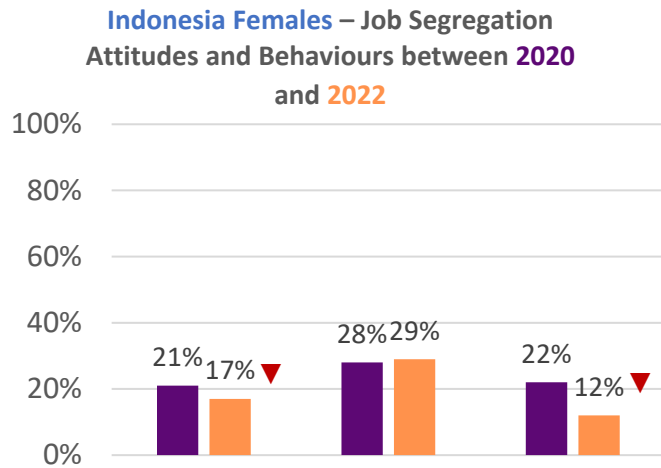
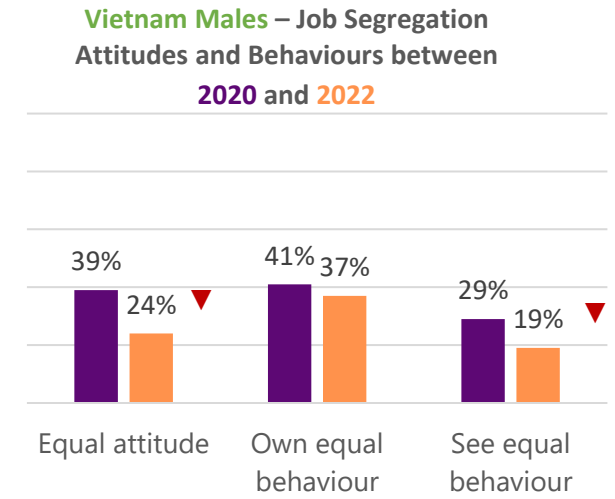
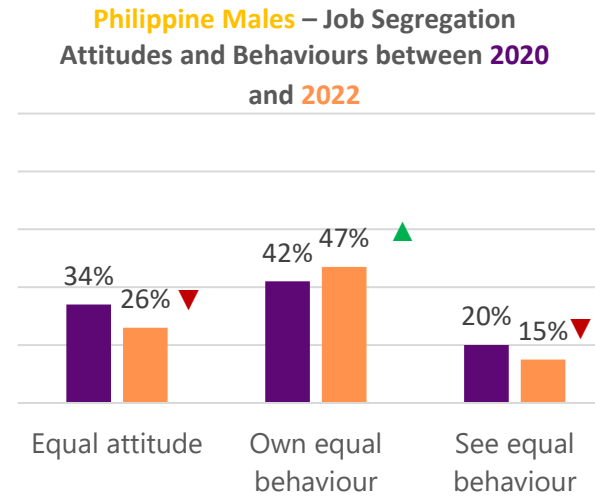
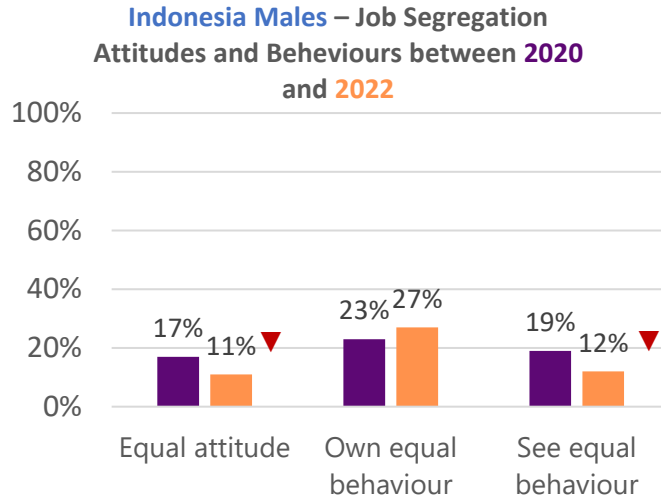


Charts: Changes in leadership attitudes and behaviours, categorized by survey wave.

▲ ▼ Indicate significance at 95% C.I.

Job segregation trends:

Although job segregation attitudes and behaviours observed among others appear to be trending toward less equality, this fact is uncoupled from personal behaviour, which is stable or trending toward greater equality across countries and genders.



Charts: Changes in job segregation attitudes and behaviours, categorized by survey wave.

▲ ▼ Indicate significance at 95% C.I.

Flexwork attitudes and behaviour:

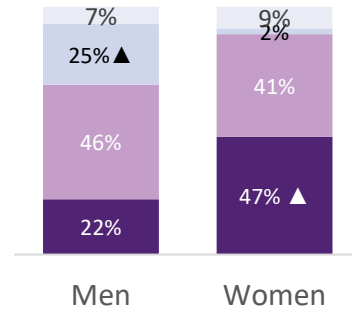


Most think flexwork should be equally accessed by men and women. In practice, flexwork is often taken equally by both partners. If flexwork use is unequal, women most often take more.

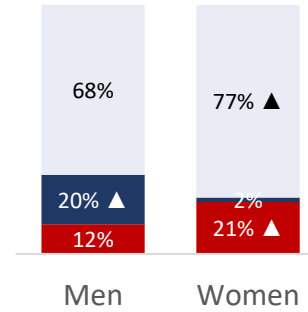
Indonesia



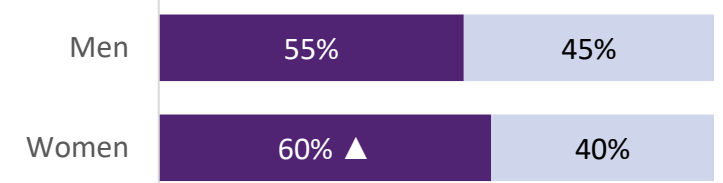
In my home: (Personal behaviour)



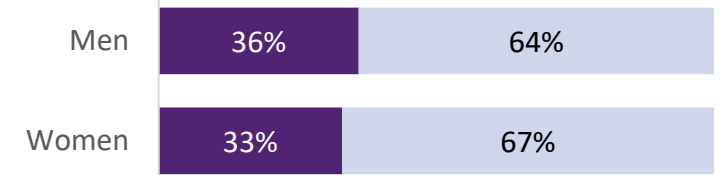
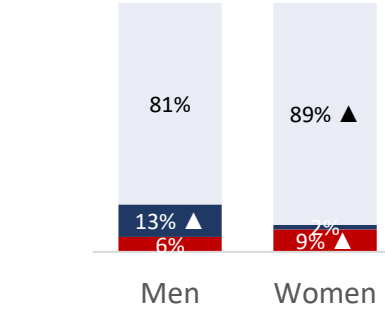
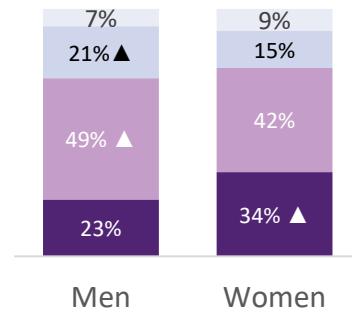
Do you think flexible work should be taken more by men, women, or equally by both?



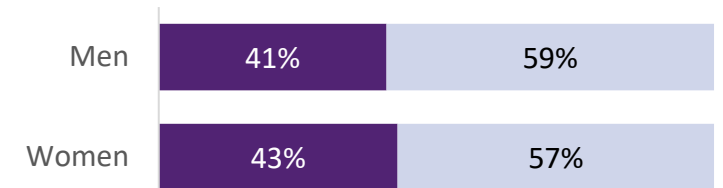
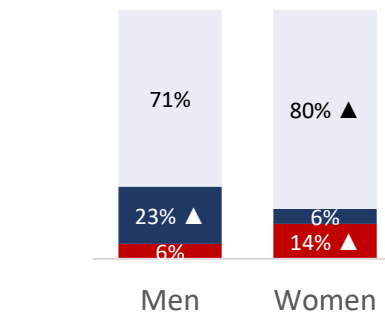
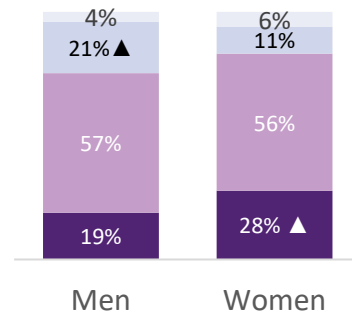
Flexible work should be something more for a woman than for a man.



Philippines



Vietnam



■ I take most of the flexwork ■ Equally take flexwork
■ My partner takes most of the flexwork ■ NA

■ Women ■ Men ■ Equally

■ Agree ■ Disagree

▲▼ Indicate significance between genders at 95% C.I.

ACTIONS



Segmentation: Introduction and Explanation

Segmentation analysis on the survey data identified distinct groups within each country and gender based on their socio-demographics and gender norms behaviours, including such characteristics as parental status, employment, age, education, religion, and gender norm attitudes. These groups were then plotted on a scale ranging from traditional to progressive attitudes and behaviours across four gender norms. Groups were then assessed and named based on their relative placement on the gender norm scales.

The segmentation analysis was first conducted 2020 on male and female in each country and replicated in 2022. Segment names were established in 2020, and the same names are referenced in 2022 in order to draw direct comparisons. The following slide introduces the segments, their proportions, and their relative placement on the attitudinal spectrum. Darker shades are used to represent segments showing more traditional attitudes and beliefs, and lighter shades represent segments with more progressive segments.

The chart on the next slide depicts gender norm attitudes on a sliding scale averaged across four norms. Segments may not always appear in the expected order of dark to light shading and segment names may not perfectly reflect behaviours and attitudes in 2022. There are several explanations for this:

- Charts averaging attitudes and behaviours across four gender norms may obscure relatively more or less progressive attitudes and behaviours on each norm.
- The segmentation model was developed for the SNAP 2020 survey. Statistical inference was used to classify SNAP 2022 respondents according to the SNAP 2020 segmentation model. This results in some loss of precision in the classification of respondents.
- The segmentation model was not intended to identify segments with distinct gender norm attitudes or behaviours, but to identify coherent groupings and then visualize them according to their attitudes and behaviours.
- Within segments, gender norm attitudes and behaviours may have meaningfully shifted on one or more norms between 2020 and 2022. However, shading and names from 2020 were retained in 2022 for the purpose of comparison.



Recognising that urban millennials are not a homogenous group, YouGov employed a separate segmentation analysis model across women and men in Indonesia, Philippines and Vietnam. This segmentation enables understanding of different groups of men and women in each of the three countries, varying by their traditional to progressive responses across the four gender norms.

Most segments in Indonesia cluster along the more traditional end of the scale, while segments in the Philippines and Vietnam range from more neutral to progressive attitudes. **The scale chart shows attitudes averaged across the four gender norms.**

The segmentation analysis showed that, compared to men, women were more likely to show progressive attitudes. In Indonesia, the most traditional segment of women is as progressive as the most progressive segment of men. Philippine women segments were more progressive than Philippine men. In Vietnam, the most progressive segment of men is about equal with the most traditional segment of women. Mothers in several traditional-leaning and neutral segments in Indonesia and Vietnam show a desire for greater equality in childcare and they are less and less likely to expect criticism from partners for suggesting this change.

KNOW YOUR SEGMENT

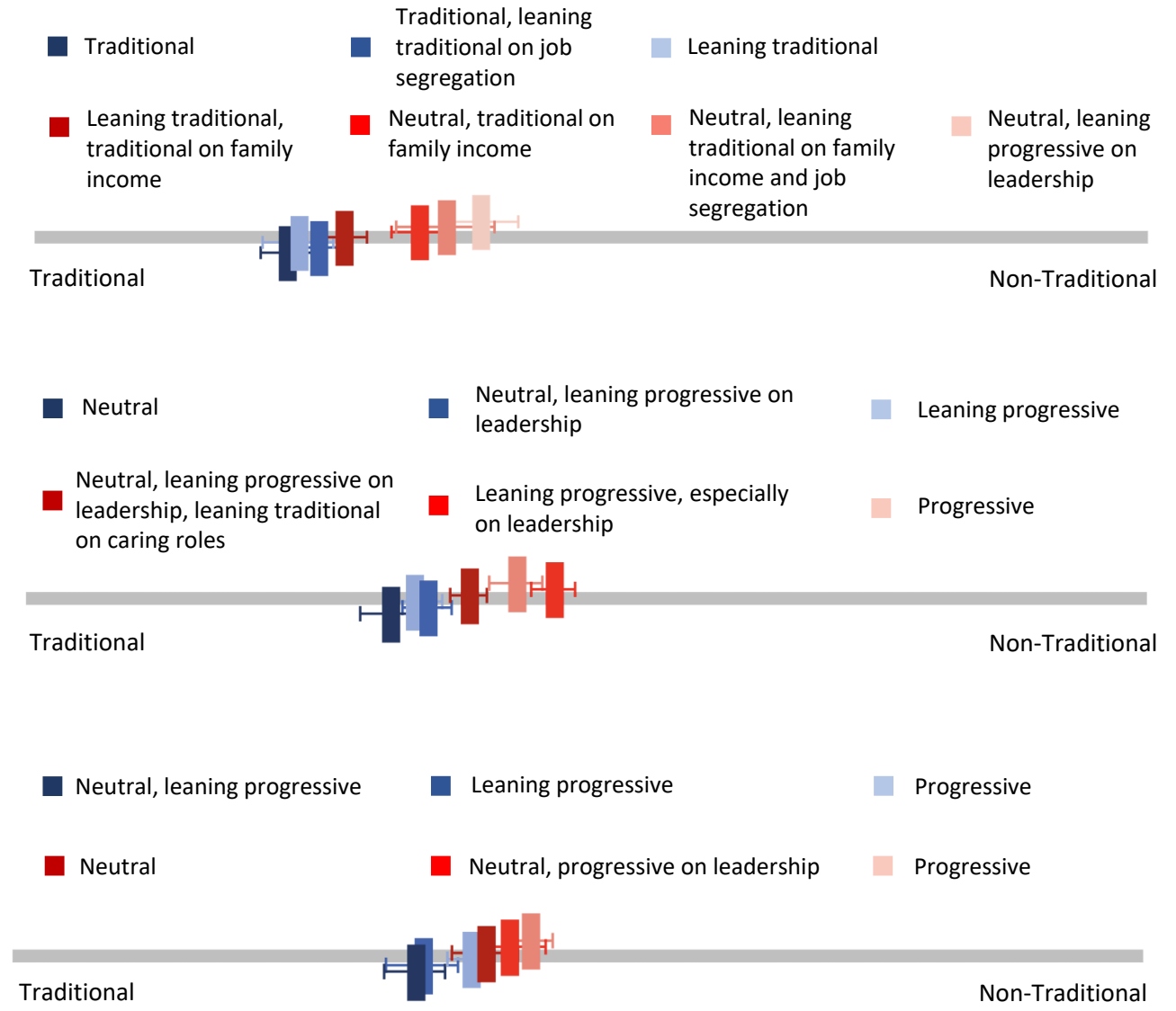
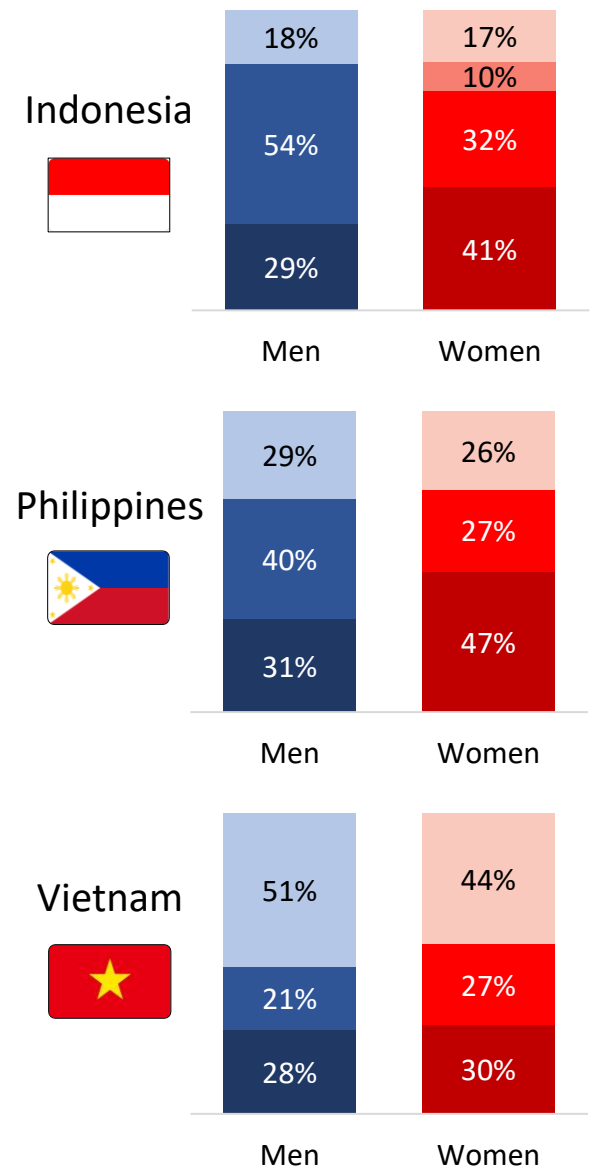


Chart: Segmentations of urban millennials in Indonesia, Philippines, and Vietnam. Sliders represent an average of attitudes across measures. ▲▼ Indicate significance from 2020 at 95% C.I.

SUPPORT THE EARLY MAJORITY

There is pluralistic ignorance among urban millennials in the Philippines and Vietnam on how many households still practice traditional norms.

The diagram below shows that 8 in 10 urban millennials in the Philippines, Vietnam, and Indonesia think that most households follow traditional norms of women taking responsibility for childcare. While it is true that a majority of females report taking most responsibility for childcare in Vietnam and Indonesia, it is not the case in the Philippines, where only 44% say this.

A similar dynamic of pluralistic ignorance exists in the Philippines and Vietnam when it comes to breadwinning. Contrary to beliefs, less than half of men report taking most responsibility for breadwinning in these countries. In Indonesia, there is a near universal belief that other households have traditional

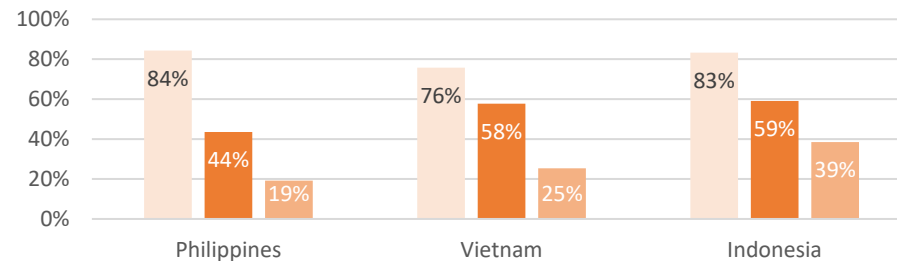
breadwinning arrangements, though only two thirds of respondents confirm this to be the case in their household.

Campaigns for changing gender norms can highlight common non-traditional practices around caregiving in the Philippines and breadwinning in the Philippines and Vietnam and encourage more urban millennials to adopt equitable practices.

Regression analysis supports the important role that progressive media can play in Vietnam and Indonesia on caregiving and breadwinning and in the Philippines on caregiving, with results varying by country and gender on whether consuming media depicting domestic or work behaviour are more impactful.* If the media can counteract pluralistic ignorance and raise awareness of the common practice of equal childcare and breadwinning arrangements, the media can move an additional lever of progressive behaviour.

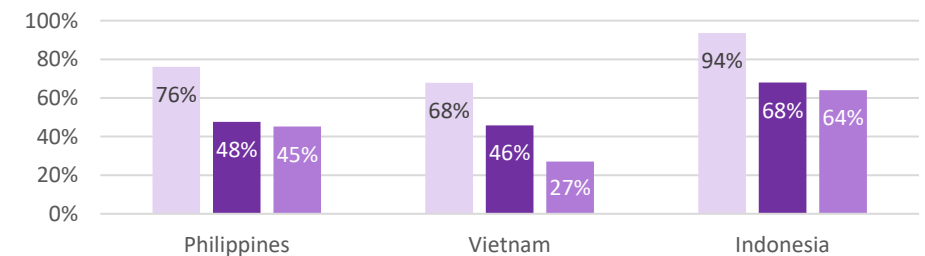


The share of **childcare**



- Perception: I think in most other households women take more responsibility for childcare
- Actual: Female respondents taking most responsibility for childcare
- Actual: Male respondents with female partners taking most responsibility

The share of **breadwinning**



- Perception: I think in most other households men take more responsibility for breadwinning
- Actual: Male respondents taking most responsibility for breadwinning
- Actual: Female respondents with male partners taking most responsibility for breadwinning

*See regression analysis in Annex 5, Model 2 for details.

Regression analysis across the four gender norms revealed the following standout factors from gender-progressive* urban millennials:

- **They saw their parents practice progressive gender norms at home when growing up.** Urban millennials who grew up with parents behaving more progressively with childcare and family income may behave more progressively. In Vietnam, equal parental modelling links with more equal behaviour for women across all norms except breadwinning, and for men there it links with more equal breadwinning. In the Philippines, equal parental modelling links with more equal caregiving among women and breadwinning among men. In Indonesia, equal parental modelling links with more equal behaviour for men in caregiving and breadwinning and for women in breadwinning and leadership. Across countries and genders, the impact of fathers sharing caregiving is more frequently linked with progressive behaviours than mothers sharing breadwinning responsibilities.
- **They observe progressive gender norms within their workplace.** Urban millennials are significantly more likely to express no preference in a boss's gender if they see workplaces in which the leadership reflects equal or progressive gender balance (without controlling for any other explanatory factors).
- **They watch progressive media.** Urban millennials who see more equal domestic gender roles in the media may behave more progressively (as observed across all norms for men and women except job segregation and family income for women in Indonesia, breadwinning for men and women in the Philippines and women in Indonesia, and caregiving for men in Vietnam). Across countries, men who consume media depictions of progressive gender roles at work more frequently show progressive personal behaviour than those who consume media depictions of progressive gender roles at home. For men, work-focused media links with progressive behaviour on three of four norms for men in the Philippines and Vietnam, and two of four norms in Indonesia, while progressive domestic depictions only link with progressive behaviour in Indonesia (on caring and breadwinning norms). Across countries, progressive media depictions of domestic gender roles are more likely to be effective with women than men.
- **Age plays a role.** Compared to 2020, regression analysis finds fewer linkages between more equal behaviour and personal characteristics such as education and religion.* 2022 analysis shows that age plays a role, especially in Vietnam. Men under 30 in Vietnam behave more equally on work gender norms, while women under 30 in Vietnam behave more equally on caregiving but less equally on breadwinning. Age also plays a role in the Philippines, where men under 30 in the Philippines have more equal breadwinning behaviour than those over 30. Age also indirectly plays a role in the behaviour of Philippine women on breadwinning. One of the only instances where regression analysis links personal behaviour to personal attitudes is for breadwinning among Philippine women. Predictors of more progressive breadwinning attitudes among Philippine women include being less than 30, and not caring for a child or an elder.

- *'Gender progressive' urban millennials tend to favour equality between men and women across the four norms or accept roles which are 'switched' from the traditional norm*
- **Being non-religious was a significant factor in predicting more progressive attitudes on some norms in the Philippines for men and in Indonesia for men and women, but personal attitudes are rarely linked with more progressive personal behaviour.*



The segmentation analysis identified areas of **positive deviance within traditional segments**. Positive deviants constitute sub-groups within segments that show attitudes or behaviours counter to the prevailing patterns in that segment. We draw attention to statistically significant factors that distinguish this group from the rest of the segment. These factors may not emerge as significant in regression analysis, which controls for other potentially correlated factors and which is conducted on the total country sample. In other words, the explanations for positive deviance are more anecdotal and may proxy for other related factors, and the dynamic within this small group may not apply to the country as a whole. Nevertheless, the findings can help fine-tune messaging targeted at specific ideological groups and help identify pockets of persuadable people within traditional segments. The segmentation analysis showed:

- **Caregiving:** In Vietnam, women within the “Neutral” segment who are positive deviants on caregiving tend to be younger than their counterparts. They are also less likely to have children. Among the next most traditional segment of women, “Neutral, progressive on leadership,” they tend to have more kids than others in the segment. Women who are positive deviants in both groups tend to be more likely to see progressive depictions of caregiving in the media. In Indonesia, positive deviants on caregiving within the most traditional male and female segment are both more likely to have seen parents modelling equal caregiving than their counterparts. Indonesian women in the most traditional segment are also more likely to be employed than their more traditional counterparts.
- **Breadwinning:** Positive deviants on breadwinning among more traditional segments of men all tend to be exposed to more progressive depictions of gender roles in the media. They are often less likely to be full-time employed. In Indonesia, positive deviants within the “Traditional” segment are less likely to have children. In all three countries, positive deviants in the most traditional male segment are more likely to be living with partners but not married. In the Philippines, traditional men with equal breadwinning arrangements tend to be younger and have parents who modelled equal breadwinning. Women in the most traditional segment in Indonesia are also less likely to have children and more likely to have parents who modelled equal breadwinning and to see progressive representations of gender roles in the media.
- **Leadership:** There are a variety of linkages to positive deviance in the belief that men are more suited to leadership roles. Across countries and genders, the most common factor distinguishing positive deviants from their counterparts on leadership is higher than average rates of seeing progressive depictions of gender roles in the media, especially of leadership depictions. In Indonesia, “Traditional” and “Leaning traditional” men are more likely to work full-time than their counterparts. Positive deviants within the “Leaning traditional, traditional on family income” segment of women in Indonesia are less likely to be employed full-time, and more likely to have had parental modelling of equal breadwinning. Positive deviants within this same group and the “Traditional, leaning traditional on job segregation” men in Indonesia are more likely than their counterparts to have a college degree. The men are also less likely to be Muslim. In the Philippines, positive deviants among “Neutral” men tend to be younger, and among “Neutral, leaning progressive on leadership” men, they are less likely to be single and more likely to be non-religious.



CONCLUSION – LEVERS FOR CHANGE

Caregiving

- Among those sharing childcare unequally, the majority of women in Indonesia and especially women in Vietnam would like their partner to do more while the majority of men across countries whose partners do more caregiving are content with the unequal distribution of childcare, as are women who do more of the caregiving in the Philippines. In Indonesia and the Philippines, social pressure can be applied to men through the media and through their own social circles to encourage more equal caregiving arrangements. Regression analysis suggests these levers are effective in changing behaviour for men in Indonesia and the Philippines.
- Regression analysis indicates that in Vietnam, social pressure on men is not likely to be effective since progressive media representations and observations of the behaviours of others do not link to more equal caregiving behaviour for men. Progressive media are only linked to more equal caregiving arrangements among women. Yet there is a divide in which many Vietnamese women would like their partner to do more, while nearly half of men whose partner does more believe this is their partner's preference. Media campaigns targeting women to advocate for more equal caregiving may be effective in changing this situation.

Breadwinning

- In all countries, attitudes about breadwinning are more traditional than attitudes about caregiving. In the Philippines and Indonesia, behaviours on breadwinning are also more traditional than caregiving. Indonesia shows a big spread, with progressive women having much more progressive attitudes than traditional men. The more progressive segments of Philippine women also outpace men in their non-traditional attitudes about breadwinning. These attitudes among Philippine women should be encouraged, since it is one of the only instances where regression analysis shows that attitudes significantly link with more equal breadwinning behaviour.
- Vietnam continues to be the country with the highest rate of employment among urban millennial men and women and the highest rate of equal breadwinning (53%), but only 53% partners equally share caregiving compared to 61% in the Philippines. High female labour force participation and the high share of caregiving responsibilities borne by women continue to explain a satisfaction gap, where mothers in unequal caring arrangements wish for fathers to do more. The promotion of flexible work arrangements could result in greater equality in both the breadwinning and caregiving norms. Vietnam shows openness to flexible work. 80% of workers access flex work options and a majority seeing it as an option for both men and women.
- Taking more flexible work is an option that both men and women facing increased domestic pressures at home as a result of COVID have opted for. In the Philippines and Indonesia, women with more domestic responsibilities as a result of COVID have taken on more flexwork, while the rate is the same for men spending more time on domestic responsibilities as those who are not spending more time.

Job Segregation

- Attitudes and job segregation behaviour observed in one's community are trending toward lesser equality in all countries and for all genders, except that Philippine women see the same amount of job segregation in their community as they did in 2020. Luckily, regression analysis finds that personal behaviour appears uncoupled from attitudes and behaviour observed among others on the job segregation norm. Personal behaviour on job segregation is either stable (among Indonesian men and women and Vietnamese men) or trending toward greater equality (among Philippine men and women and Vietnamese women).
- Across countries, even female segments that hold more progressive attitudes on other norms are showing more similar attitudes to more traditional segments on the job segregation norm.
- For all three countries, regression analysis identifies media as a possible lever for changing behaviour on job segregation for men, and for women in the Philippines and Vietnam.

Leadership

- Indonesia has the most traditional attitudes and behaviours on leadership of all countries. Urban millennials in Vietnam have relatively progressive attitudes on leadership, but tend toward more male dominated leadership arrangements in reality. In the Philippines, progressive attitudes on leadership tend to match reality, where a majority of leadership roles have roughly equal representation of men and women.
- For the leadership norm, attitudes, observed behaviour, and personal behaviour are stable or trending more equal or progressive in all countries and for all genders except among Indonesian and Vietnamese males. For Indonesian males, personal attitudes and behaviours observed in one's community are both trending in a less equal direction in 2022 compared to 2020. For Vietnamese males, personal behaviours on the leadership norm are trending toward lower equality.
- Regression analysis show that in both Indonesia and Vietnam, the example of what men see around them and what they see in the media are both influential on men's leadership behaviour. Progressive depictions of gender roles in the media are associated with positive deviance on this norm in more traditional male segments. Media campaigns should seek to arrest the drift in behaviour in the more traditional direction.



Media campaign targeting

- Effectiveness of progressive media messages in changing behaviour varies by country. There is a linkage of consumption of progressive media to more equal behaviour for men and women across all gender norms except caregiving in Vietnam, and for all gender norms except breadwinning in the Philippines. In Indonesia, it correlates with more equal behaviour on caregiving and leadership norms for men and women, and breadwinning and job segregation for men.
- In general consumption of media depictions of work-related gender norms link to more equal behaviour on job segregation and leadership. Such messages also link to more equal behaviour on caregiving for men in the Philippines and breadwinning for men in Vietnam. But progressive media depictions of domestic gender roles are linked to more equal caregiving behaviour for women (as well as men in Indonesia), and to more equal breadwinning for women in Vietnam.

Additional resources

- Report annexes address:
 - Annex 1: Detailed explanation of regression methodology and results
 - Annex 2: Demographic distribution of sample as a whole and of each segment
 - Annex 3: For each country, norm specific overview of segment and demographic fall-out
 - Annex 4: Details and caveats on 2018 and 2022 trend comparison
 - Annex 5: Question wording and sample sizes for survey questions summarized in main report
 - Annex 6: Glossary of terms
- Designer's Country Toolkits address:
 - Key findings
 - 2018-2022 trend review
 - Overview of segmentation distribution and fall-out on attitudes and behaviours
 - Top level introduction to segments
 - Detailed profile of each segment and relevant strategic opportunities



METHODOLOGY

Target population: [Vietnamese / Philippine / Indonesian] adults who are between 18 and 40

Interviewing dates:

- Vietnam: November 7-16, 2022
- Philippines: November 3-10, 2022
- Indonesia: November 7-14, 2022

Number of respondents: N=1000 men and N=1000 women in each country

Margin of error for each country:

- Vietnam: +/- 2.42%
- Philippines: +/- 2.28%
- Indonesia: +/- 2.29%

Survey Mode: Web-based surveys

Survey Language: Indonesia – Bahasa, Philippines – English, Vietnam - Vietnamese

Length: 15 minutes

Topics covered:

COVID impacts

Gender attitudes and behaviours

- At work: Norms around job segregation and leadership; gendered perception of work roles
- At home: Norms around caring roles and family income; gendered perception of domestic roles

Matching and weighting: YouGov matched and weighted survey starts to a population frame representative of that country's 18 to 40 year old population. The respondents were matched to the sampling frame on gender and age. The matched sample was weighted to the sampling frame using propensity score weighting on age, gender, and region. The weights were then post-stratified on a three-way stratification of gender, region, and age. The matched and weighted dataset was then sub-set on eligible completes meeting the target population requirements. Weights were re-balanced to an average of 1 and trimmed at 6.



Analysis

To analyse the survey data, researchers employed both a regression analysis and a segmentation analysis.

The regression tested for correlations between collective and individual attitudes and behaviours while the segmentation identified groups with distinct attitudes on gender roles. Both analyses looked for significant differences across age, education, religion, marital, parental status and childhood experiences.

In 2022, researchers replicated the 2020 segmentation analysis, which clustered urban millennials in groups according to those with more traditional attitudes on gender roles through to those with more neutral and progressive attitudes on gender equality. In 2020, researchers used factor analysis to identify the most explanatory characteristics and then performed hierarchical clustering based on the selected variables such as demographics and attitudes regarding gender roles in the home and workplace. See the next slide for more details on the methodology used to replicate the 2020 segmentation in 2022.



2022 Segmentation Methodology

In 2020, YouGov conducted a segmentation analysis, which clustered urban millennials in groups within each country and gender based on their socio-demographics, including such characteristics as parental status, employment, age, education, and religion, and based on their attitudes regarding gender roles in the home and workplace. Researchers used factor analysis to identify the characteristics most identifying each group and then performed hierarchical clustering based on the selected variables. The segments were named according to how they fell along the spectrum of traditional through progressive attitudes and behaviours across four gender norms.

In order to enable longitudinal analysis across waves, researchers decided to maintain the same segmentation groups and names in SNAP 2022 as in SNAP 2020. In order to approximately replicate the SNAP 2020 segmentation applied to SNAP 2022 respondents, researchers began with SNAP 2020's uniquely determined segmentation input variables for each group (men and women separately in Indonesia, the Philippines, and Vietnam, for a total of 6 groups).

Researchers then used Random Forest (RF) algorithm to use those same input variables (~35) to predict the segment classification from SNAP 2020 as the outcome variable in Random Forest.

The top 20 variables in terms of their node purity from that RF analyses were identified and used as input variables for Linear Discriminant Analysis (LDA) to predict segment classification again on SNAP 2020 data, so as to assess the accuracy rate. The LDA results include "coefficients" attached to each variable, indicating for each respondent's value for each variable, how much ought to be added to a score for each segment – the segment with the highest score is the assigned segment. Those same coefficients for each of these important input variables were then stored and used to calculate segments on new data: SNAP 2022 respondents. (This makes this effectively a "typing tool" such that the coefficients and equation could be implemented on an individual person's responses immediately, and even manually, if needed on any new data.)

This process was utilized for four out of six groups, but for women in Indonesia and Vietnam, the input variables were too predictive of the segments in the LDA step, where near perfect separation was preventing the model from being run. For these two groups, we instead stopped at the Random Forest algorithm step, saved the model there and applied the RF model to SNAP 2022 data to assign new data segments.



Survey topics

The survey covered the following topics:

COVID impacts:

- Change in income and pressure as income earner and source of pressure
- Change in pressure to earn income for family as non-income earner and source of pressure
- Change in own/partner's domestic responsibilities
- Change in pressure to do housework and caring for dependents (children and dependent adults)
- Gender equality in the workplace and at home

Work and Home life:

- Work life:
 - Job Segregation: Perception that certain job types are specific to women and others to men
 - Leadership: Perception of women as leaders
- Home life:
 - Caring Roles: Women's role as carer for children and family members, home maker
 - Family income: Men's perceived role as primary income earner/provider for the family
 - **For each of four norms:**
 - Personal attitudes
 - Societal norms (others think)
 - Societal norms (I see others)
 - Personal behaviours (not asked about work norms if not employed; if not parent or partnered, asked about aspirations for family norms)
 - Disapproval, source, and impact of disapproval for non-traditional behaviour (if applicable – e.g. employed, partnered, or parent)
 - Reasons for equal/unequal arrangement at home/work (except on job segregation norm)

Flexwork:

- Norm: Perception that flexwork is more for a woman than a man
 - Personal attitude
 - Personal behaviour (*look up logic*)
 - Societal norms (others think)
- Access to flexwork arrangement, and main reasons for taking flexwork arrangement
- Own/partner's desire to take more flexible work options
- Disapproval and source of disapproval of taking more flexible work options

At Work:

- Reasons to work
- Most important reason to work
- Promotion aspirations

Additional topics:

- Perception of gender attributes at work and at home
- Preference for boss's gender
- Gender roles in family of origin for self and partner
- Types of gender representations encountered in media
- Relationship status pre-COVID



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