

EVE-OLUTION: WHY WOMEN RULE THE WEB

UNDERSTANDING THE DIGITAL LIVES OF WOMEN AROUND THE WORLD

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THINK PINK: WOMEN AND THE WEB

The Internet has grown by leaps and bounds, opening up opportunities for people to connect across a variety of activities, from dating to advertising to blogging. The Internet evolution has proven to be something of an Eve-olution, with women playing a pivotal role, satisfying their need for connection.

Once viewed as the rarified domain of male teenage “gear-heads”, the Internet today boasts some 2.1 billion users worldwide¹⁾ and almost half of the online population is now female.

From inception, gender differences in web activities were apparent. Men tended to download software programs and viewed the web as a form of amusement during leisure hours (anyone remember *Zork? Doom? Space Invaders?*). Women turned to the web as an efficiency booster, maintaining family schedules and searching magazine, health and retail sites for relevant content to cope with daily life. This paper looks at the current state of gender-based differences related to online activity, investigating questions like:

- What are the online behavioral differences between men and women?
- Why do women use different online channels and what specific needs do they fulfill?
- How can advertisers leverage this information to be more effective with their digital campaigns?

Women in general, and mums in particular, represent high-value targets for advertisers. The studies underpinning this analysis provide tone and content strategies for digital ad campaigns with the potential to deliver maximum marketing resonance, rendering brands and advertising more relevant, engaging and effective.

GIRL POWER

Although the Web is still in its relative infancy for emerging countries, significant demographic differences have surfaced in digital media utilization. Among the most dramatic differences are those associated with gender. Drawing on a number of studies and data sources, the authors have determined that content appealing to men may hold little interest for women, and digital strategies that may succeed in one country cannot be ported automatically to another.

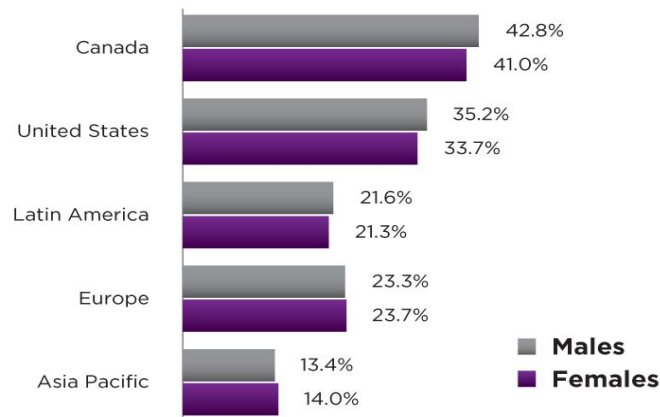
Women have expanded their sphere of influence to the digital mainstream, accounting for almost half (46%) of global Internet traffic.²⁾ Women comprised more than half of the 215 million U.S. Internet users as of July 2011 and more than half of all North American users.³⁾

Even in areas where women represent a minority of the online population, they’re closing-in fast on the top spot. Presently, women make up 50% of Latin American, 49.5% of European, and 43% of Asia-Pacific Internet users. In terms of sheer economic clout, those percentages convert into 45.3 million Latin women, 162.8 million European women and 206.4 million Asian women consumers.⁴⁾

TICK TOCK

On a worldwide basis, an inverse relationship exists between the number of women on the web and the amount of time spent online. While there are fewer women than men active online globally, women spend more time per person on web-based activities (24.8 hours per month per woman) than men (22.9 hours per man).⁵⁾ Some regional patterns differ, with men recording more online hours than women in Canada, the United States and Latin America (see figure 1).

FIGURE 1, AVERAGE HOURS SPENT ONLINE PER MONTH BY REGION AND GENDER



Source: comScore Media Metrix, February 2011

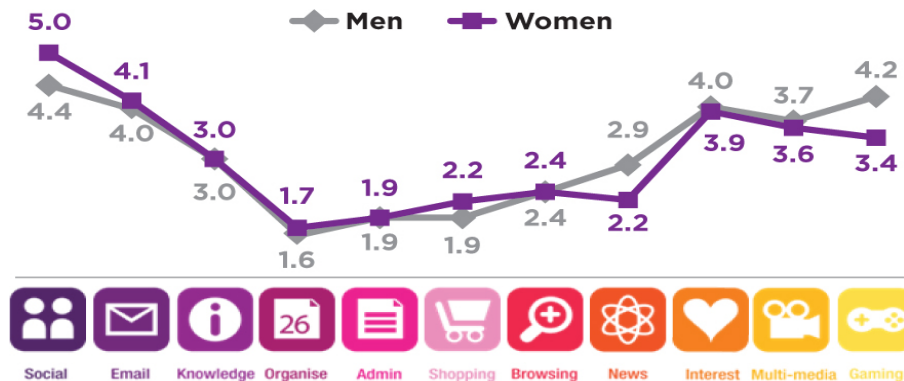
To visualize this trend on an indexed regional basis, it becomes apparent at a glance that women devote more time to online pursuits, most notably in the Asia Pacific region.

DIFFERENT STROKES

In the past, marketers assumed that more men than women were technology early adopters and targeted this elite corps of gadget gurus to achieve rapid uptake of new technologies. While that may have been true once upon a time, the premise no longer holds.

The *Digital Life* study examined different types of online activity, comparing usage patterns by gender, and determined that women have equaled or surpassed their male counterparts in eight of 11 distinct areas. They spend 36 more minutes per week on social media than men, 18 more minutes shopping and six minutes more on email, organizing and personal interests. Younger women ages 16-20 in particular spend a significant amount of time on social media, logging 6 hours 48 minutes per week versus 5 hours for the average woman or 4 hours 24 minutes for men. (See figure 2.)

FIGURE 2, HOURS PER WEEK OF DIGITAL ACTIVITY BY GENDER



Source: TNS Digital Life Study, 2010

Internet interest patterns for men encompass online gaming (48 more minutes per week than women), catching up on news (42 more minutes per week than women) and multi-media viewing (six more minutes per week than women). Both genders spend an equal amount of time in knowledge-based online activity, administrative tasks and general browsing.

LEADING CATEGORIES, SITES

Where do women spend their online time? What destinations draw them in and keep them engaged? Are women and men really that different? Perhaps -- when it comes to needs states and motivation; less so when it comes to the most popular web categories.

The list of Top 10 categories for adult men and women around the world is identical. The only difference is the top two positions change with gender: women spend the most time on web portals, while services sites such as message boards, chat groups, coupon/incentive sites and email occupy the top spot on the list for men. (See table 1.)

TABLE 1, TOP 10 WEB CATEGORIES FOR ADULT FEMALES 18+ YEARS

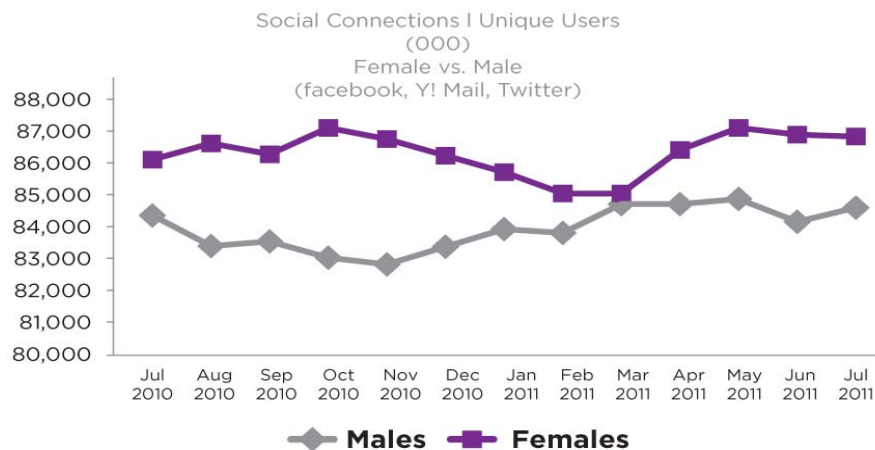
1. Portals (#2 men)
2. Services (#1 men)
3. Corporate Presence
4. Search / Navigation
5. Entertainment
6. Conversational Media
7. Promotional Servers
8. Social Networking
9. Directories / Resources
10. News / Information

Source: comScore Media Metrix, June 2011

In terms of specific web sites, the six most popular web sites for American men and women were the same: Yahoo!, Google, Microsoft, Facebook, AOL and Amazon. Wikimedia and Turner Digital slotted onto both lists, but in different rankings among the Top 10 sites. The men-only sites listed were CBS Interactive and eBay, while the women-only sites completing the Top 10 list were Ask Network and Glam Media.⁶⁾

THE GLOBAL SHOUT-OUT

Relationships. Connections. Affiliations. Associations. Friendships. Alliances. Unlike men, women around the world share a common psychology that emphasizes frequent and emotionally-resonant communication across all available outlets.⁷⁾ This stands as a foundation pillar supporting the degree and intensity of the female involvement with online media. In the United States alone there are 2.1 million more women than men who communicate online regularly.⁸⁾ (See figure 3.)

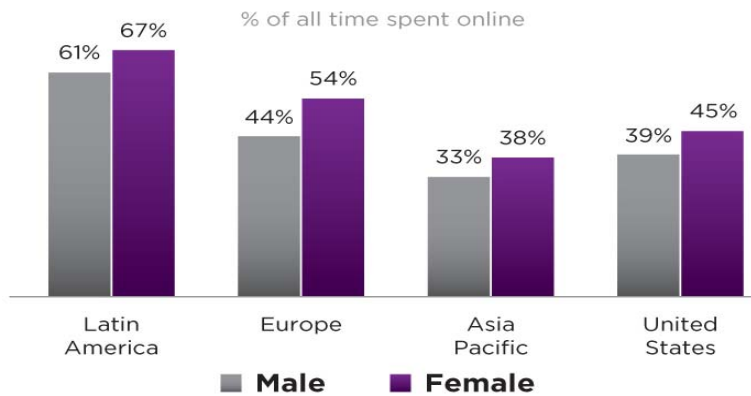
FIGURE 3, U.S. ONLINE COMMUNICATION PATTERNS BY GENDER

Source: comScore Media Metrix, July 2011

Looking across all online activity on a worldwide basis, women spend half their online time communicating via instant messaging, email, discussion/chat rooms, ecards, social networking, blogs and community sites, while men spend just 44% of online time in those pursuits.

While the general gender communication trend holds constant around the world (women communicating online more than men), regional differences emerged. Latin American women devoted the most time of any region to digital discussions, more than two-thirds of their online time, followed by European women at 54%, U.S. women at 45% and Asia Pacific women at 38%. (See figure 4)

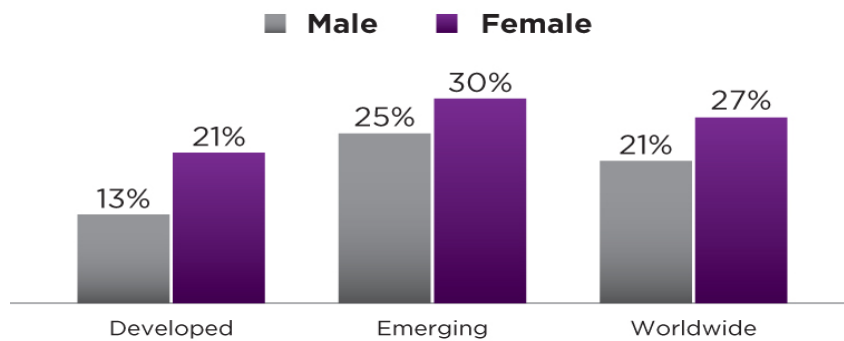
FIGURE 4, REGIONAL VIEW OF TIME SPENT COMMUNICATING X GENDER



Source: comScore Media Metrix, February 2011

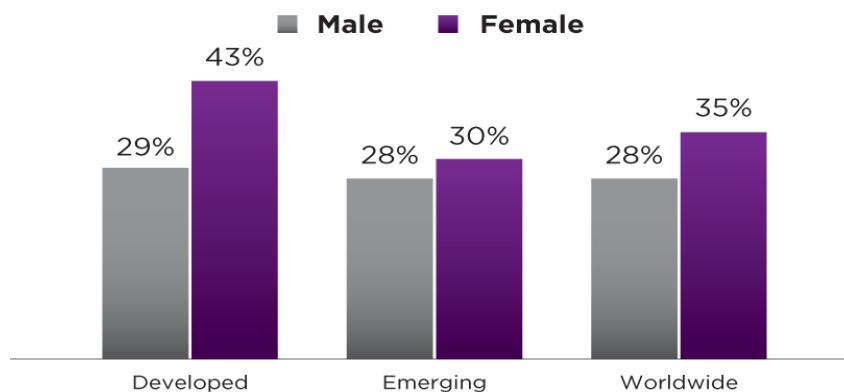
Women tend to engage in certain types of online “connecting” activities more than men. Taking pictures (figure 5) and sending mobile messages to friends (figure 6) are quite common experiences for connecting consumers. Worldwide, 27% of females take and share pictures with their friends versus 21% of men. Women are also much more likely to communicate with their friends via text messaging on their mobile phones across both emerging and developed markets. Regardless of the type of connection that people make, females tend to drive those personal connections much more than men.

FIGURE 5, PERCENT OF MEN/WOMEN SHARING PICTURES



Source: TNS Digital Life Study, 2010

FIGURE 6, PERCENT OF MEN/WOMEN SENDING TEXT MESSAGES



Source: TNS Digital Life Study, 2010

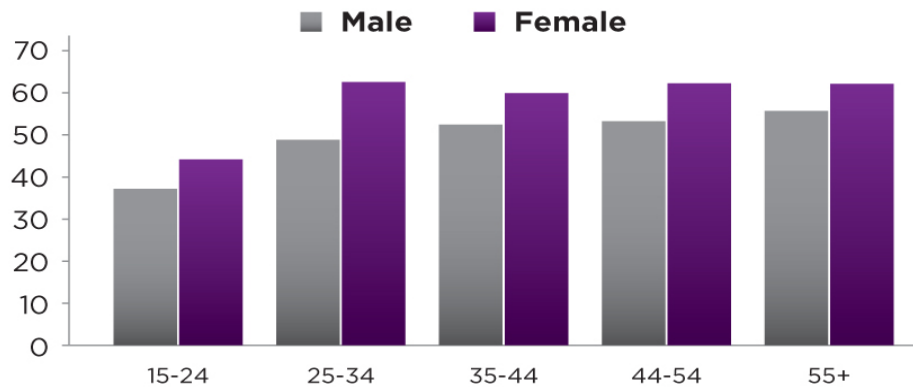
RETAIL THERAPY

One of the unique ways in which women engage the Internet is their use of retail therapy. Whether perusing brick and mortar outlets or online shopping options, nothing lifts the spirits more than a little “retail therapy”. Popular culture portrays shopping as a purely female pastime, but the data prove otherwise. While it is true more women than men shop

online in the United States (86.8 million vs. 84.7 million respectively), male bargain hunters spend 151 more minutes per year checking out shopping sites for a total of 2,432 annual Internet shopping minutes per man on average.⁹⁾

On a global basis, women clock significantly more online shopping minutes than men, particularly women ages 25-34 who spend 13.8 more minutes per month than their male counterparts, followed by women ages 45-56 who log nine more minutes per month. (See figure 7.)

FIGURE 7, GLOBAL ONLINE RETAIL TIME/ MINUTES PER PERSON BY GENDER



Source: comScore Media Metrix, June 2011

Men and women exhibit very similar online retail patterns, sharing nine of the Top 10 shopping sites, albeit with different rank orders. The leading male sites skew towards entertainment and electronics, the more popular female sites tend towards more general merchandise or family-oriented options. (See table 2.)

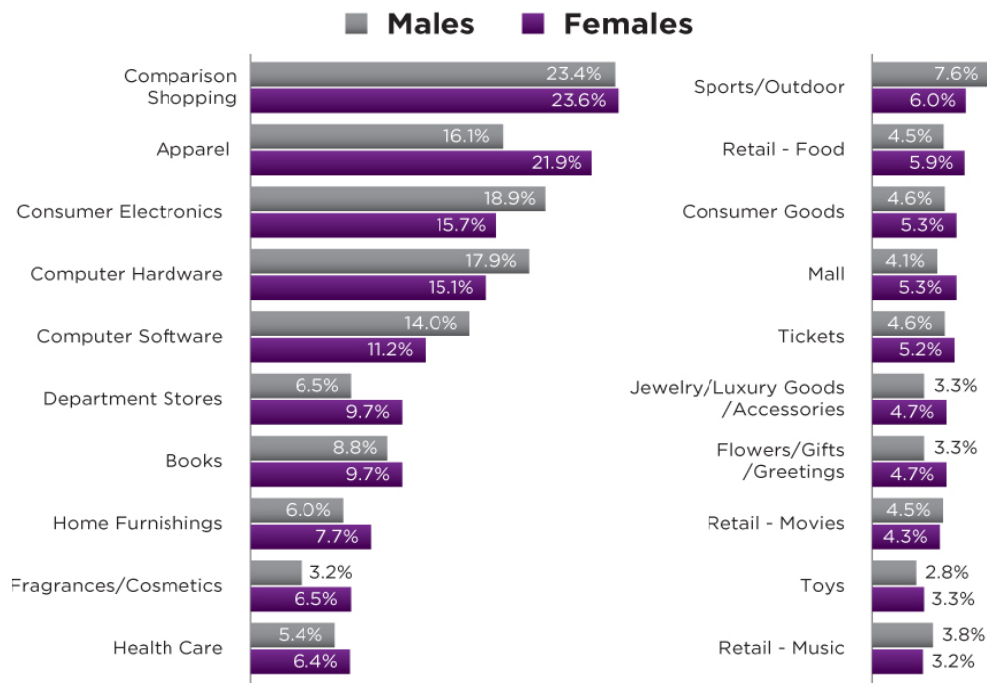
TABLE 2, TOP 10 INTERNET RETAIL SHOPPING SITES FOR U.S. BY GENDER (JULY 2011)

Site	Ranking Women	Ranking Men
Amazon Sites	1	1
Wal-Mart	2	3
Apple.com Worldwide Sites	3	2
Target Corporation	4	8
NETFLIX.COM	5	4
Yahoo! Shopping	6	5
Hewlett Packard	7	10
Shopzilla.com Sites	8	-
Google Shopping	9	6
Nextag.com Sites	10	9
Best Buy	-	7

Source: comScore Media Metrix, July 2011

Breaking down Internet shopping behavior by category, women out-shop men in 14 of the 20 largest categories: comparison shopping, apparel, books, department stores, home furnishings, flowers/gifts/greetings, fragrances/cosmetics, mail, health care, tickets, food, consumer goods, jewelry/luxury goods and toys. Consistent with gender stereotypes, men gravitate toward computer hardware, consumer electronics, computer software, sports/outdoor interests, movies and music purchases.¹⁰⁾ (See figure 8)

FIGURE 8, GLOBAL RETAIL SUBCATEGORY/REACH BY GENDER

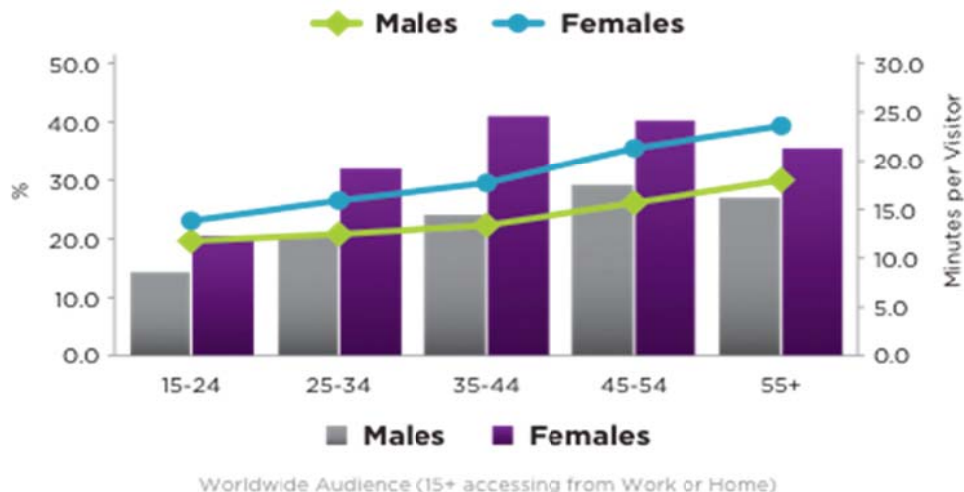


Source: comScore Media Metrix, June 2011

MEET DR. MOM

Another unique function for digital women is the role of the health care provider. Call her “Dr. Mom”, “Caregiver-in-Chief” or “Chief Wellness Officer”, but whatever honorific you prefer, there’s no denying that women serve as the family health gatekeeper, significantly more immersed in health and wellness content online than men at every age. The time women spend online per year investigating health and wellness information begins to ramp in their twenties and peaks during middle age at more than 22 minutes per person per month, reflecting their enlarged circle of responsibility. (See figure 9)

FIGURE 9, GLOBAL HEALTH BY AGE, GENDER: % REACH, TIME SPENT



Worldwide Audience (15+ accessing from Work or Home)

Source: comScore Media Metrix, June 2011

These mid-life mums keep tabs on everyone’s physical state - their kids, their spouse, their elderly parents, even the grandkids. More than 86.8 million U.S. women turn to the web for health advice, spending 2,281 minutes per person annually on average.¹¹⁾

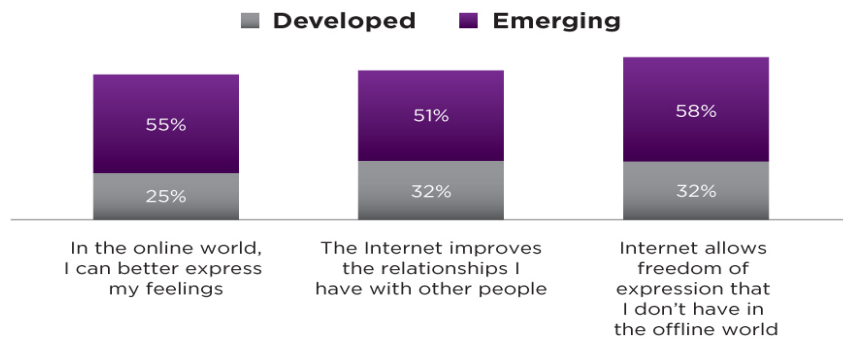
Globally, women’s interest in health issues increases over time. The gender gap opens up at 3% among the 15-24 age cohort, widening to 10% by age 55, with 42% of women exploring topics ranging from diet and exercise to disease states

and treatments versus just 32% of men. Interestingly, men’s interest in health issues peaks at ages 35-44 while women’s concern grows steadily over time, accounting for 22.8 online minutes per month by the time she reaches age 55. (See figure 9.)

EMOTIONAL CONNECTIONS

The type of personal connections women have with the Internet are not universal. When developing campaigns it is important to note that there are strong regional differences worldwide. Not only are there strong behavioral differences between men and women, but the emotional connections women have with the Internet vary quite dramatically by emerging versus developed markets. Women in developing markets are more than twice as likely as peers in developed nations to say they express their feelings more freely in the online world where political, cultural and religious strictures do not apply. (See figure 10.)

FIGURE 10, THE INTERNET AS A MEDIUM FOR PERSONAL EXPRESSION



Source: TNS Digital Life Study, 2010

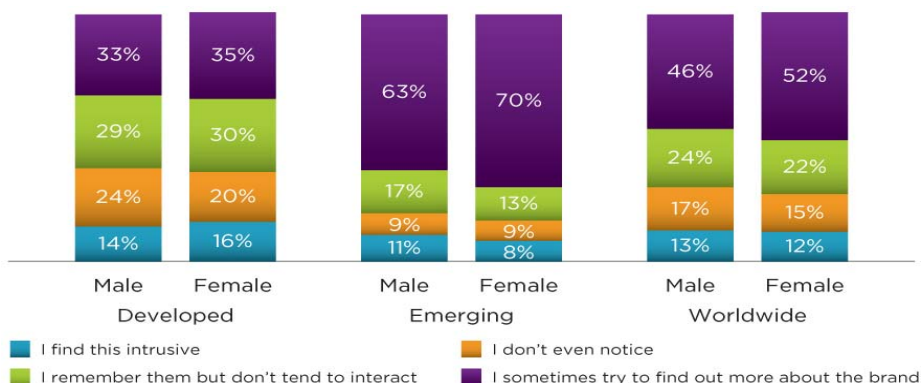
There are many facets to this trend. Relative newcomers to the online world tend to access the web via mobile devices which lend themselves to shorter, timelier connections with others online. Emerging market users relate to the Internet in a more aspirational than functional way, perceiving it as a vehicle for achieving goals and pivotal to their life. Given women’s high level of receptivity to the Internet in emerging markets, this presents significant opportunities for advertisers to take advantage of.

ADVERTISING RECEPTIVITY

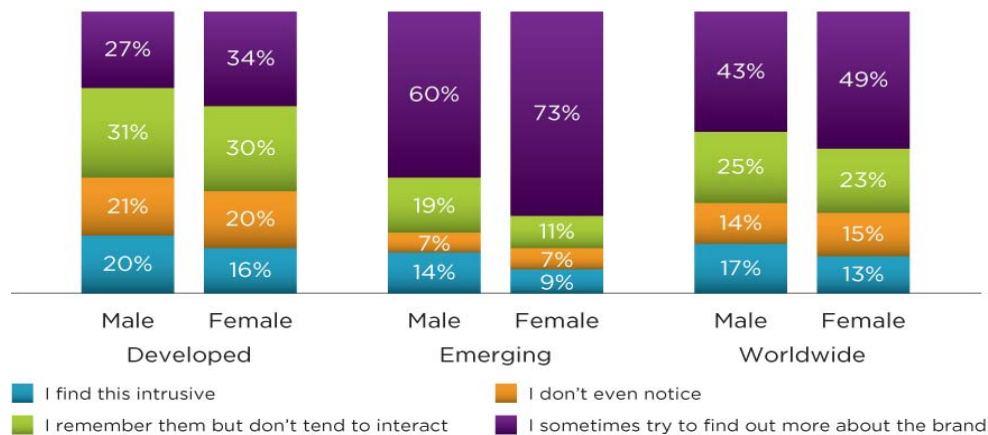
Extending these personal connections into advertising campaigns is extremely important. Breaking through online clutter with a personally-resonant and contextually-relevant advertisement is critical to maximizing the return on investment (ROI) of an advertising campaign everywhere in the world. Across a variety of media and devices, women are much more likely to be receptive to advertising campaigns than men. Coupled with female online activity levels, this bodes well for advertisers looking to obtain a higher ROI with their digital campaigns.

Females report a higher likelihood of advertising receptivity in pre-purchase/browsing and shopping activities. Women in emerging markets are twice as likely as developed market females to exhibit a higher propensity to advertising receptivity during the online pre-purchase and purchase phases. (See figures 11 and 12.)

FIGURE 11, ONLINE PRE-PURCHASE AND BROWSING AD RECEPTIVITY



Source: TNS Digital Life Study, 2010

FIGURE 12, ONLINE PURCHASE AD RECEPTIVITY

Source: TNS Digital Life Study, 2010

EVERYONE'S CONNECTED

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Even the visionaries responsible for creating the web could never have conceived of the Internet's ultimate global impact. The web functions as electronic connective tissue binding humanity together into a living organism that transcends the artificial boundaries of geography, time, gender, culture or religion that once separated humankind.

For women, connectivity assumes even greater importance. The female need to communicate is paramount, accounting for the largest share of her online time, regardless of lifestage or demographic variable. Communication activities such as social networking, email, blogging and instant messaging comprise 52% of online time for women around the globe.

Marketers looking to engage with women via social media can follow a simple formula: $ME = f(N + C + R)$ where online marketing effectiveness (ME) with women is a function of meeting needs (N), selecting appropriate channels (C) and matching the message to a receptive (R) outlet.

NEEDS: WHY WOMEN COMMUNICATE ONLINE

The Yahoo! *Connectonomics*: U.S. research studied 3,000 American women online and discovered 16 specific need states that explain the majority of their online behavior: care of self (83%), bargain hunting (74%), improve myself (72%), be enabled (71%), affectionate closeness (64%), mutual sharing (61%), release and escape (58%), broadening horizons (50%), validation (41%), repair and healing (38%), in control (37%), be in the know (29%), being the best (18%), up the ante (10%), social currency (8%) and pushing the limits (5%).

After analyzing these findings by standard demographic variables such as age, employment status and presence of children, it became evident that the need state drivers behind female online communication patterns surmount age groups, lifestages and geography.

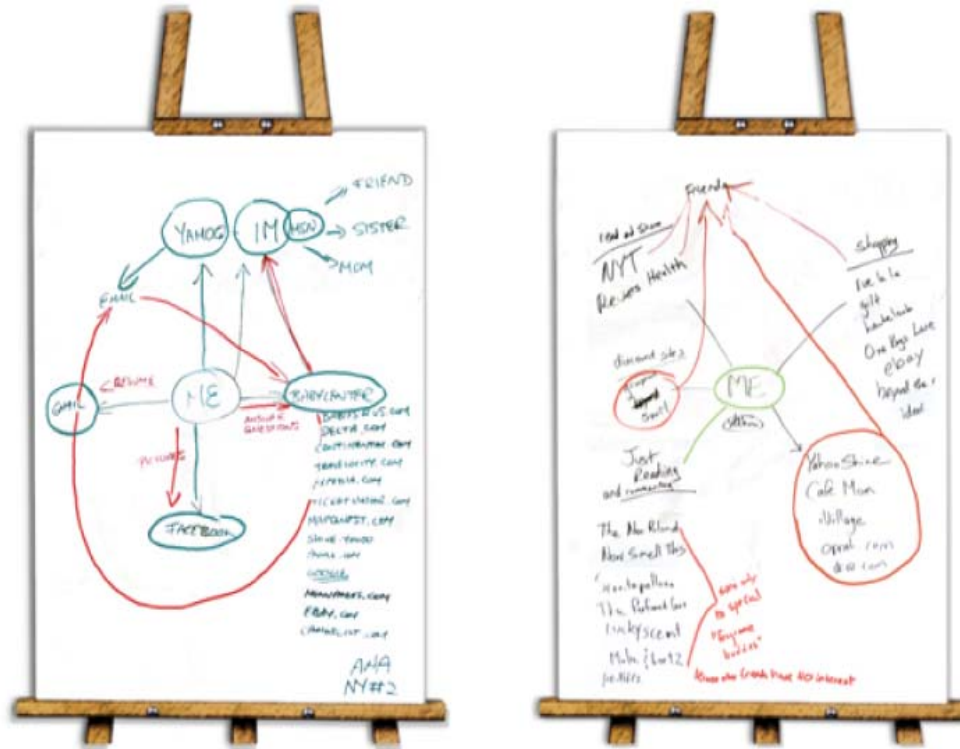
Simply put, the reasons women communicate online are more similar than different. To illustrate, regional *Connectonomics* studies determined that the need states of women in Brazil, Mexico, Saudi Arabia, Egypt and the United Arab Emirates all converge around three areas: self-improvement/personal growth, mutual sharing/ bonding and being enabled/informed.

CHANNELS: COMPLEX LIVES, SIMPLE NEEDS

Women lead incredibly complex lives with increasingly conflicting responsibilities. (See figure 12.) Mother, spouse, daughter, sister, employee, Momtrepreneur, chef, coach, care giver, cleaner, student, teacher...and the list goes on. Their online habits reflect this diversity and complicate things for advertisers.

Different online channels play different roles in women's lives, dictating different advertising strategies for marketers. For example, social networking and instant messaging are tapped most frequently for casual interactions. Email retains its status as a powerful online channel in terms of overall scale and ease of content-sharing.

FIGURE 13, A DAY IN THE LIFE OF WOMEN ONLINE



(This depicts a typical day in the digital life of women, photographed from focus group materials.)

Source: Yahoo / Added Value, Yahoo! Connectonomics (U.S. Study)

When it comes to ticking-off the most entries on the 16 need states list, however, popular lifestyle sites like Shine, online groups and special interest sites rank high. Perhaps counter-intuitively, the anonymity associated with these content sites can lead to deeper emotional connections for women because they provide access to solutions from peers, free of judgment or censure.

Three in ten respondents in the *Connectonomics: U.S. study* found advertising encountered on content sites to be relevant and engaging.¹²⁾ Nearly four in ten women said that content sites delivered helpful information about new products and brands.¹³⁾ Content sites consolidated their role in customer acquisition when almost 45% of study respondents agreed they were a good place to get information about products and brands.¹⁴⁾

Connectonomics sheds light on the best sites to place advertising, sponsor content and even contribute content. The study provides a reliable framework for evaluating need states, who people share with online, how they share, what they share, and how advertising influences the ecosystem, which relates back to the equation:

$$ME = f(N + C + R)$$

Marketing Effectiveness is a function of needs plus channel plus receptivity.

Taking into account all these dimensions, marketers can flight different types of messages, expect certain types of actions and plan for specific levels of ad receptivity. Brand messaging should take consumer needs into consideration and be nuanced accordingly. The framework also provides marketers with a better sense of success metrics. For example, some channels deliver less well on sharing and marketers can optimize expectations for those metrics accordingly.

RECEPTIVITY: CHANNELING SUCCESS

All online channels are not created equal. When it comes to advertising impact, some channels deliver greater returns than others due to enhanced receptivity levels. Women in the *Connectonomics U.S. study* proved three times more receptive to marketing messages delivered via lifestyle, specialty and review sites than other channels. Delving deeper into the reasons behind this phenomenon revealed the reason why: credibility.

Some 42% of survey respondents said women's lifestyle sites carried reliable information about brands and products; significantly more than the scant 6% of women who said the same about social networking sites.

Key learnings from the study suggest specific tactics for matching content and channels such as: *women's lifestyle sites* -- gear information toward new product information, buzz and trends; *special interest sites* -- tailor advertising specifically to the need states of women; *review sites* -- emphasize product/brand benefits and special bargains/ deals; *blogs* -- target content specific to the interest area; *online communities* -- sponsor editorial content and keep advertising topical; *email* -- nurture relationships with opt-in programs and focus on more graphics, less copy; *instant messaging* -- adopt a quick, light, fun attitude to reflect viewer's more casual frame of mind; *social networking* -- explore ways to integrate ads into the conversation to avoid feeling disruptive; and *Twitter* -- consider the short shelf life and quick turns for messages, requiring timely, catchy material.

CONCLUSION

Given the current growth trajectory of digital media, women are leveraging online communications at an unprecedented rate, already accounting for almost half of global Internet traffic. Despite the egalitarian nature of online media, a gender divide remains, with men more likely to pursue traditionally masculine-oriented content such as online gaming, news and multi-media viewing and women more likely to opt for shopping, email, organizing and personal interest sites. Women worldwide spend half their digital life engaged in connecting activity, satisfying the need for relationship and emotional context.

Women around the world exhibit remarkably consistent needs and behaviors on the web as measured by ~16 discrete factors. Truly, they are electronic "sisters" in every sense of the word, sharing a need for self-improvement/personal growth, mutual sharing/ bonding and being enabled/informed. These need states correspond to online channel selection, where web site attitude and functionality influence audience receptivity, dictating the tone and content of advertising.

Digital media functions as an effective port of entry for advertisers, with women in both developed and emerging countries demonstrating greater receptivity to advertising during every stage of the purchase funnel than men.

Capitalizing on the potential of digital media requires a thorough understanding of women's need states and motivations, and how those translate across the various online channels. The more closely ad messaging aligns with the media and motivation, the more it will integrate into the digital lives of women all over the world.

FOOTNOTES

1. "Internet Users in the World Distribution by World Regions-2011," <http://www.internetworldstats.com/stats.htm>
2. TNS Digital Life
3. TNS Digital Life
4. TNS Digital Life
5. comScore Media Metrix, July 2011
6. comScore Media Metrix, July 2011
7. "Psychology of Male and Female Communicative Activity," S.A. Vasyura, Spanish Journal of Psychology, May 2008, Volume 11, p289-300. <http://www.ncbi.nlm.nih.gov/pubmed/18630669>
8. comScore Media Metrix, July 2011
9. comScore Media Metrix, July 2011
10. comScore Media Metrix, April 2010
11. comScore Media Metrix, July 2011
12. Yahoo! Connectonomics Study, Slide 40
13. Yahoo! Connectonomics Study, Slide 41
14. Yahoo! Connectonomics Study, Slide 42

DATA SOURCES

comScore Media Metrics 2010 and 2011, TGI (Kantar Media), Global Monitor (Futures Company), other audience data where applicable/available

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TECHNICAL APPENDIX: KEY SOURCE METHODOLOGIES

TNS Digital Life Study

Digital Life covers 46 markets, utilizing cutting edge techniques to uncover digital behaviors and expert analysis to understand the attitudes and needs that drive them. Digital Life offers both a lens on the digital world, and the frameworks required to make actionable business decisions within those frameworks. It can be used to drive global strategies or inform local tactics.

Yahoo! Connectonomics Study

Yahoo! partnered with the research firm Added Value to conduct a quantitative online survey among almost 5,000 women across the globe, supplementing findings with results from qualitative explorations including over 40 one-to-one interviews and eight focus groups in New York and Colorado. The resulting study provides a new framework for targeting women online, one centered around the needs of today's woman.

Because connecting online represents the largest share of female Internet time, the study explored the needs associated with their use of the following communication channels and sites (where women could connect with others): social networking sites, Twitter, email, online community groups, instant messenger, blogs, review sites, women's lifestyle sites (Yahoo! Shine, iVillage, SheKnows, etc.), and special interest sites (CafeMom, BabyCenter, etc.).