

# REAL WOMEN.

DIGITAL WORLD.

The Untold Story of Women & The Web

Commissioned by:

YAHOO!



STARCOM MEDIAVEST GROUP

Research Conducted by:



## KEY FINDINGS

- The Internet is the leading media choice among women, and trails only work, sleep and spending time with family across overall activities. It has emerged as the most cherished, most vital medium in women's lives.
- The content most sought by women online — including news, weather, games and finance — is not found in typical women's magazines.
- Traditional media still plays a key role in women's lives, particularly in the form of relaxing entertainment. Women consistently use magazines, product packaging and television to learn about websites.
- Women fall into eight overlapping personality types in their online experience. These are influenced by who the women are in the offline world, as well as their key behavioral attributes online.
- Women are consummate "surchers," doing a hybrid of surfing and searching within a number of their favorite sites.
- Women feel justified spending time online at work for non-work activities, as they are working more hours than ever before. Going online for personal matters at work has replaced the coffee or water cooler break.
- Women have become multi-channel consumers — they are shopping online more than ever before. They like to browse online and research items they will later buy either online or in the retail store.

## TABLE OF CONTENTS

1	■	INTRODUCTION
2	■	METHODOLOGY
3	■	PERSONALITY PROFILES
5	■	LIFESTYLE
9	■	MEDIA CHOICE
13	■	ROLE OF INTERNET AT WORK
15	■	THE EMOTIONAL INTERNET
17	■	ONLINE BEHAVIOR
20	■	THE RETAIL ENABLER
23	■	CHILDREN'S INTERNET USE
25	■	INSIGHTS FOR MARKETERS
27	■	CONCLUDING THOUGHTS

## INTRODUCTION

Marketers and media companies who hope to truly connect with women consumers in the coming decades cannot ignore the growing importance and impact of the Internet, digital media and communication devices on those women's lives. This study is intended to shed light on precisely how women interact with digital media — especially the Internet — and how that interaction impacts their lives, their relationships, their jobs, their commercial activity and their use of other media. But the true impact of this study goes beyond the numbers.

***Real Women. Digital World.*** performs two additional tasks that will serve marketers and media providers well as they attempt to “crack the code” on reaching women consumers. First, it challenges a series of “myths” about how and why women use the Internet in their daily lives. Too often, it is taken as gospel that women use the Internet in a purely utilitarian fashion; that they see it as a task-oriented medium that carries very little emotional punch; or that it's used mainly during “down-time.” These and other assumptions turn out not to be true, and the research that follows will illuminate the real how and why of women's Internet use.

The study also presents a series of personality profiles of the woman Internet consumer. These portraits present, for the first time, a framework for understanding the mindsets and values of women as they make the Internet and digital media an even greater part of their lives. ***Real Women. Digital World.*** will help marketers get inside the mind and personality of the customer to make better media selections, create better advertising and marketing messages and truly engage women in a dialogue online.

Yahoo! will use the insights from this study to further shape and focus our relationship with the millions of women who visit our sites and use our tools every day. We invite and encourage our marketing partners to do the same.

## METHODOLOGY

This project was a two-phased market research study. Four qualitative listening sessions were conducted in San Francisco and Chicago by Just Ask A Woman and a quantitative online survey was conducted by TNS.

Each two-hour Just Ask a Woman LIVE® session included 25 women ranging in age from 18-49. Two of the groups were conducted among light Internet users and two were among heavy Internet users. The discussions centered around the different roles of the Internet, its practical and emotional benefits in each woman's life, its role compared to traditional media and how women are using the Internet to get what they want on their own terms. Just Ask a Woman has been conducting in-person, in-depth qualitative research among over 4,000 women since 1998. Their questioning methodology and analysis is the result of listening to women on subjects ranging from retail to media, from beauty and health to automotive, from financial services to consumer electronics, as well as dozens of other categories and industries.

The online quantitative survey was built upon the findings from the qualitative listening sessions. The survey instrument was designed to elaborate and quantify topics from the qualitative research. The questionnaire focused not only on the simple “whys” and “hows” of women's Internet usage, but also examined women's feelings about the Internet and the impact it has had on their lives.

The survey was conducted among women on the TNS NFO MySurvey Community panel in early March, 2004. A total of 1,199 women ages 18-49 participated in the survey, which averaged just over 25 minutes to complete. Four quota groups were set in order to obtain representative samples of working women and women with children. These quota groups consisted of:

- Employed women with children (n=312)
- Employed women without children (n=300)
- At-home women with children (n=287)
- At-home women without children (n=300)

## PERSONALITY PROFILES

**The profiles shown below were identified from qualitative findings from the Just Ask a Woman Live® listening sessions. They are not mutually exclusive; women have different online personalities based on their tenure online as well as their reason for being online.**

### DIGITAL COWGIRL

She is galloping across the emerging Internet frontier, whooping it up with each new discovery. She is a brave pioneer, visiting new sites and chat rooms, finding new ways to bring the digital world into her own. Fifty-one percent of women say they love finding new and exciting websites on the Internet, and 42 percent say they'll get online even if they're not looking for anything in particular. Sites that skew high for Digital Cowgirls: games.

### DIGITAL CASSANDRA

She is the predictor of what's next. As soon as she learns something new, she discusses it with friends online and lures them to check out her most recent discoveries. She is an influencer because she is perceived to "see" things before they happen. Forty-three percent of women say they tell all their friends about websites they like, and 22 percent claim they are usually the first of their friends to discover an interesting website. Sites that skew high for Digital Cassandra: news, finance, home & family and food & entertainment.

### Digital Diva

She loves to be known for being only about the best. There's good, better and Diva. She likes to one-up her friends by using the "smarter" site. She'll buy Marc Jacobs or that set of Calphalon cookware online. Sixteen percent of women say they use the Internet to buy luxury items. Sites that skew high for Digital Diva: shopping, travel, health & beauty, entertainment & gossip and finance.

## PERSONALITY PROFILES CONTINUED

### Digital Debutante

She is fresh to the ball, but eager to show that she is a quick learner — not a novice. She may be newer to an active online life, but she is a willing experimenter who's ready for prime time. Twenty percent of women state that although they are relatively new to the Web, they are constantly learning about new applications and websites.

### Digital Detective

Probably the closest to the traditional image of the woman as researcher online, she is as thorough as a librarian and as careful as a scientist. What's the best price? What's the best cure? She is relentless in her search for truth. Eighty-two percent of women say the Internet is the first place they go if they need to conduct research on a particular topic, and 58 percent can spend hours on the Internet researching every aspect of an issue or item they're interested in. Sites that skew high for Digital Detective: news, weather, finance, home & family and food & entertaining.

### Digital Voyeur

From searching for old boyfriends to tapping into chat rooms just to see what people are talking about, she uses the Internet to anonymously check out the world. Just over one-fifth of respondents say they have used the Internet to look up old friends or boyfriends with whom they have not kept in touch. Sites that skew high for Digital Voyeur: news, finance, games, home & family, food & entertainment and astrology.

### Digital Socialite

With the help of the Internet, she has become even more successful in making the best social plans and keeping everyone in the loop. The best part is, she's spending less time doing it and gets more credit for it. Twelve percent of women agree with the statement, "I use the Internet to help me plan my social life," and 15 percent say they have used the Internet to meet new people, be it for dating or just friendship. Sites that skew high for Digital Socialite: travel, entertainment and gossip.

### Digital Shopkeeper

The Internet has given women the confidence to start their own businesses. Just over 10 percent of women say they have started an online business or have used the Internet to generate income. Sites that skew high for Digital Shopkeeper: news.

## LIFESTYLE

**MYTH:** Busy women have barely enough time in the day to juggle all they need to do. It's tough to "make time" for the Internet.

**FACT:** The Internet has become a central activity within women's lives, enabling the compression of time and becoming an integral means of managing life and accomplishing what needs to get done.

### THE 38-HOUR DAY

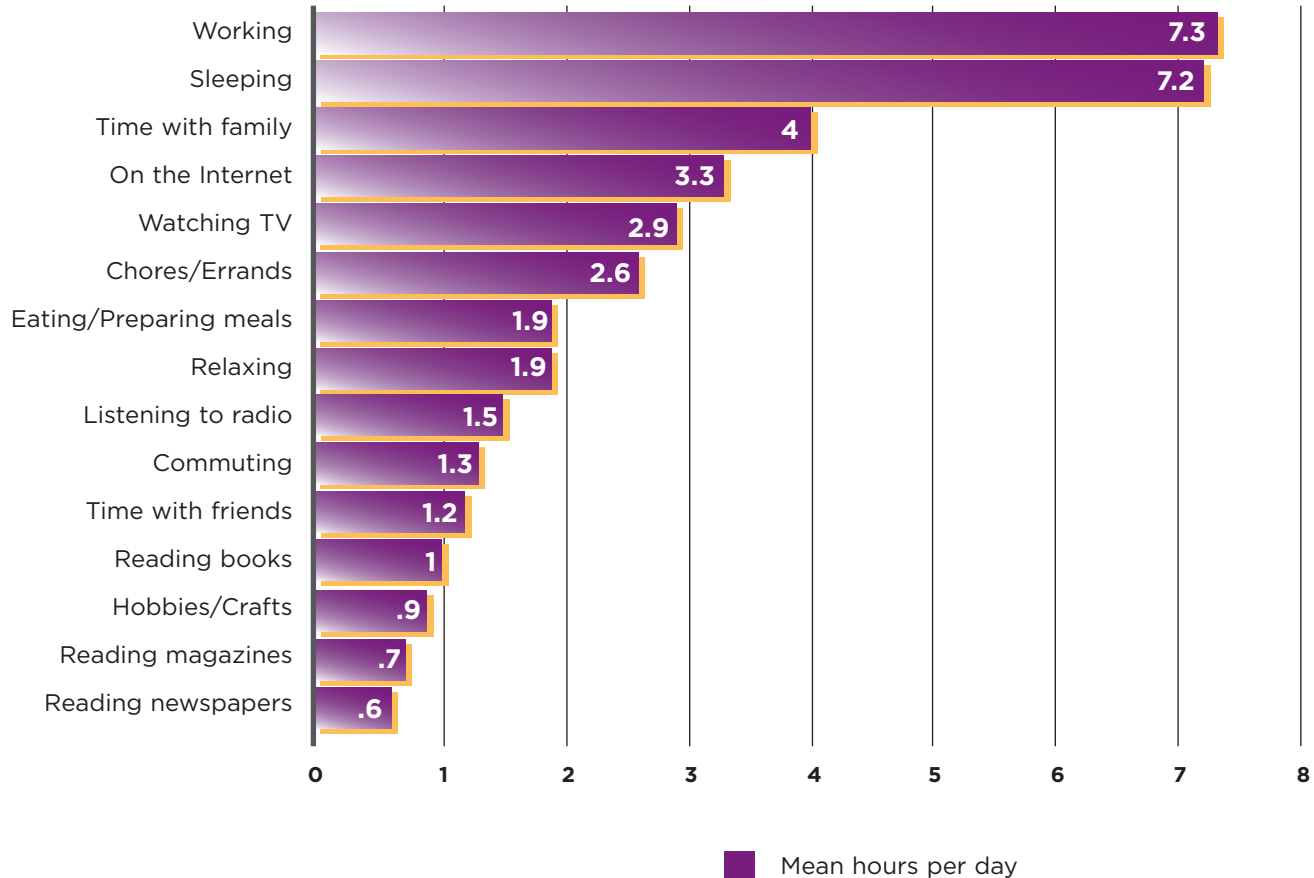
Today's women are busier than ever. Thirty-six percent of working women are spending more time working than they were one year ago. The good news is that one-quarter of women are spending more time with their family than they were a year ago. One reason that work-life balance seems to be shifting in a positive direction is the efficiency and empowerment that the Internet affords to women. While usage of traditional media is declining, almost half of all online women state that they are spending more time on the Internet than they were one year ago.

Women are also faced with a wider range of activities vying for their attention, as well as a seemingly endless array of media choices. In this era of multi-tasking, the Internet is the leading choice and activity in terms of time spent, trailing only work, sleep, and spending time with family across overall activities. The sum total of all of these activities comes to nearly 38 hours (see adjacent chart).



## LIFESTYLE CONTINUED

*Question:* On average, how many hours per day do you spend doing each of the following activities?



## LIFESTYLE CONTINUED

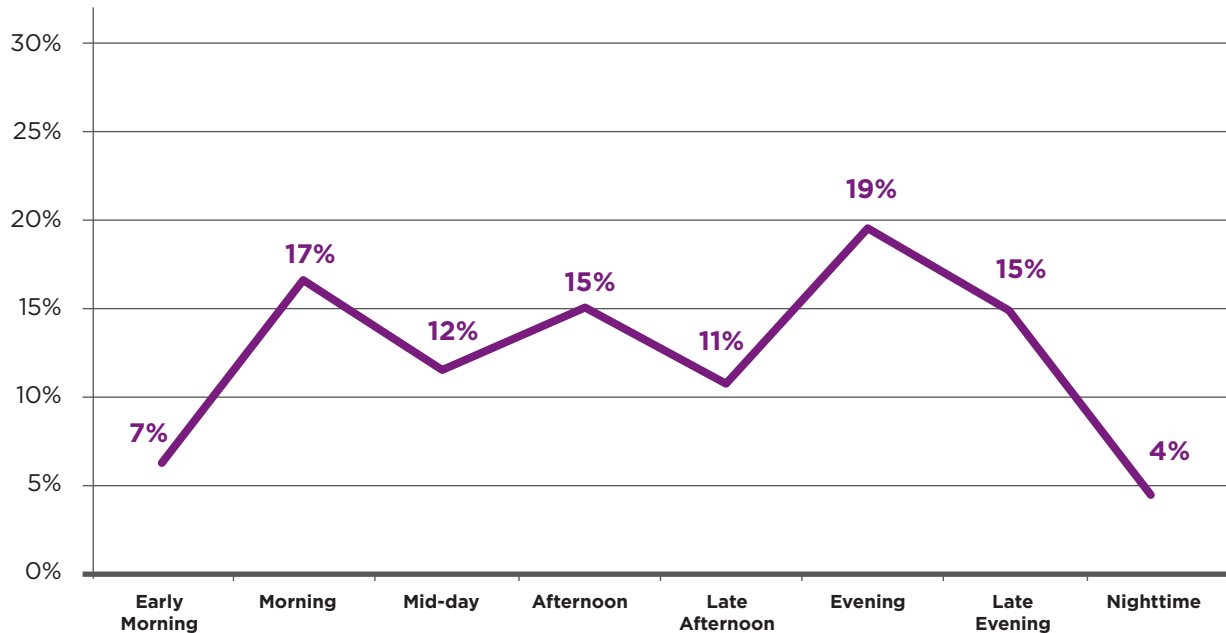
**MYTH:** Women are so busy that they just access the Internet during their few available down hours, like after midnight or when the kids get off the family computer. It's get it done and get off.

**FACT:** Despite their hectic days, women are making time for the Internet; they are using it all hours of the day. They are not only online during the traditional early morning and after work/late night “down times,” they are online between chores and at work.

“We have four computers. I’m a stay-at-home mom and I’m obsessed. I’m on mid-morning. I’m on in the afternoon and then in the evening time, till the wee hours of the morning.”

## LIFESTYLE CONTINUED

*Activity:* Out of 100%, please estimate what percentage of your time spent on the Internet falls within each of the following time frames.



## MEDIA CHOICE

**MYTH:** As a relatively new factor in women's lives, the Internet doesn't carry the same weight, emotional connection and "trust factor" as other, more mature media.

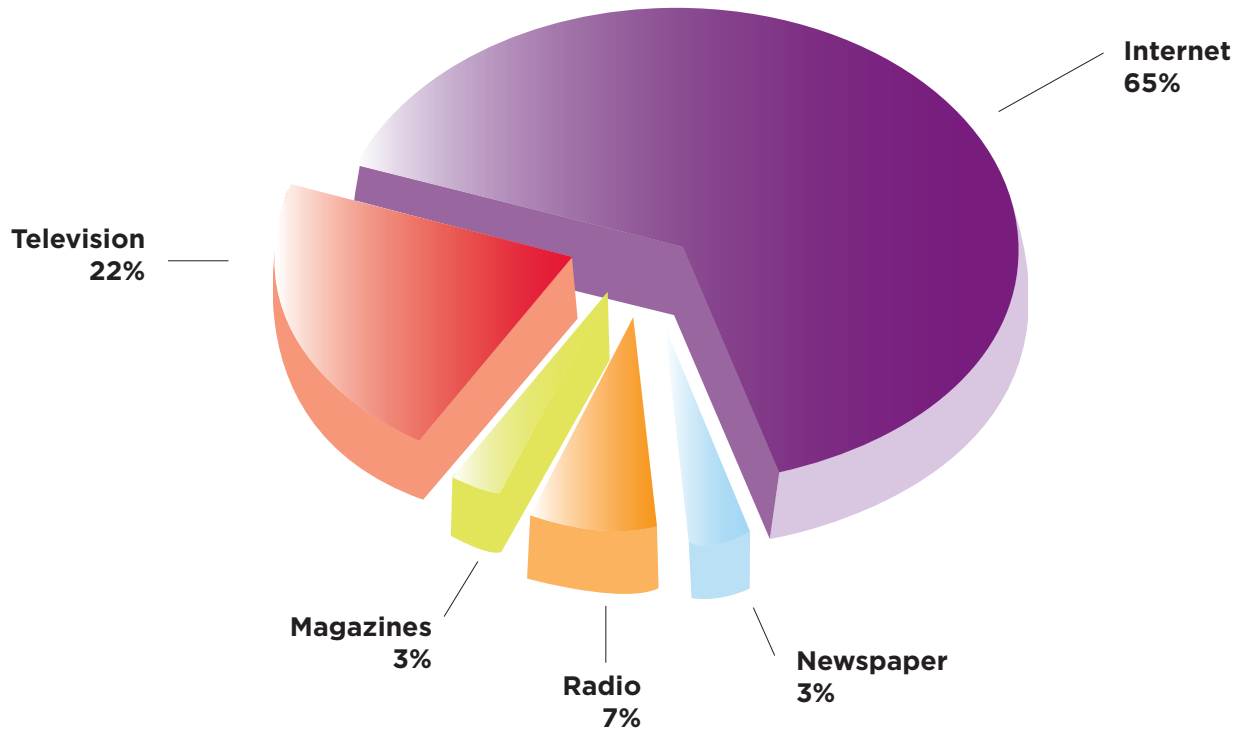
**FACT:** The Internet has rapidly emerged as the most cherished, most vital medium in the lives of women.

The convenience and variety of information available has made the Internet the hands-down choice when it comes to news, information and entertainment. When asked which medium they'd prefer to have on a desert island, women overwhelmingly selected the Internet over TV, radio, newspapers and magazines. Women believe that the Internet, even without email, has everything that other media have plus more. Many say they just can't live without their Internet connection.

**"You'd definitely have to pry the Internet out of my cold dead hands."**

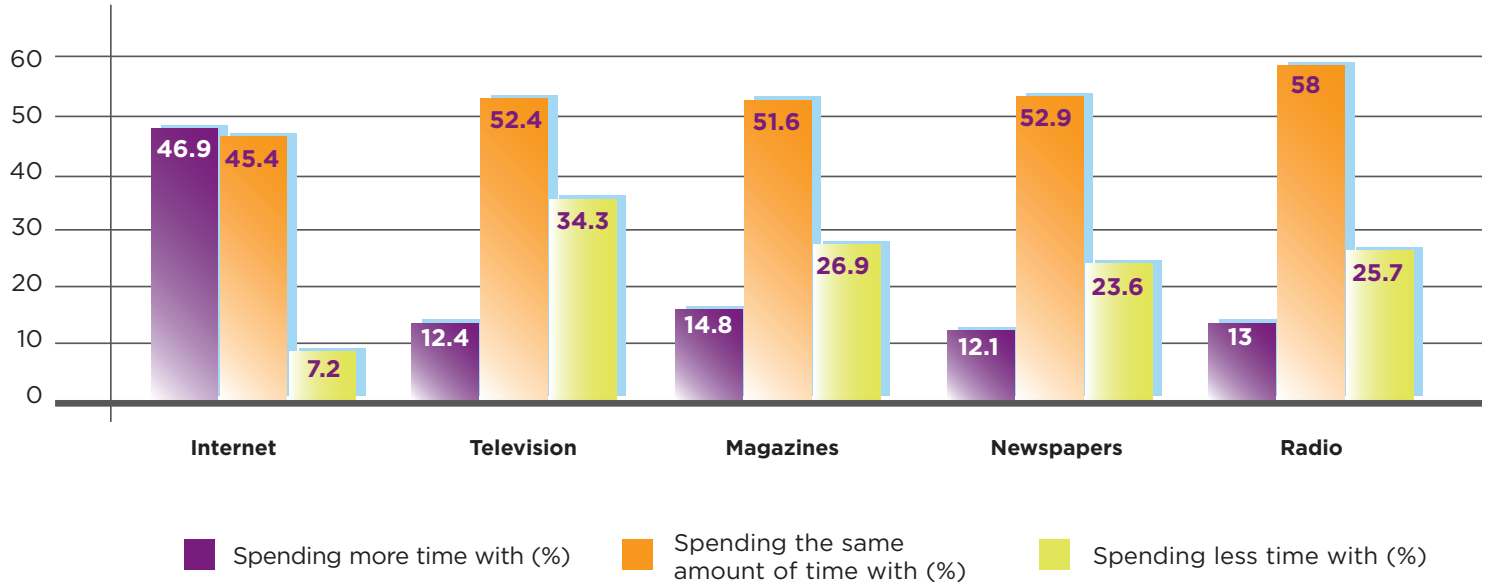
## MEDIA CHOICE CONTINUED

*Question:* If you were stranded on a desert island and had only one of the following as a source for news, information and entertainment, which would you prefer to have?



## MEDIA CHOICE CONTINUED

*Activity:* Please indicate how your participation in the following activities has changed in the past year.



Traditional media are still being utilized, just to a lesser extent than five years ago. Despite all the advantages of the Internet, it still falls short in certain areas. Women aren't canceling their magazine and newspaper subscriptions or sending their TVs to Goodwill. They are, however, spending less time with other media than they did before.

## MEDIA CHOICE CONTINUED

Traditional media still plays an important role for women, particularly in the form of relaxing entertainment. Magazines have the added benefit of portability and a full 65 percent of women who read magazines online actually prefer to read the hard copy. It's a quick get away, a means to read short, interesting articles that one may not have bothered to read if searching online. In addition, traditional media is also a way that many women are learning about new websites. Over half of the women stated that they used magazines or product packaging to learn about websites, while 40 percent found out about new websites through television.

**“ With the TV you can go mindless. That’s what I use it for — you don’t have to think too much. The Internet has more but you have to pursue it and be proactive.”**

**“ If there is a specific thing that you’re concerned about, you can just type that in and then there are 100 articles that you can thumb through. The magazine educates you on things you might not know about. Things I might not know to think about. The magazine brings you new things as opposed to the Internet where you go if you want more information.”**

## ROLE OF INTERNET AT WORK

**MYTH:** Online use in the office tends to be “heads-down” and focused almost solely on work-related activity.

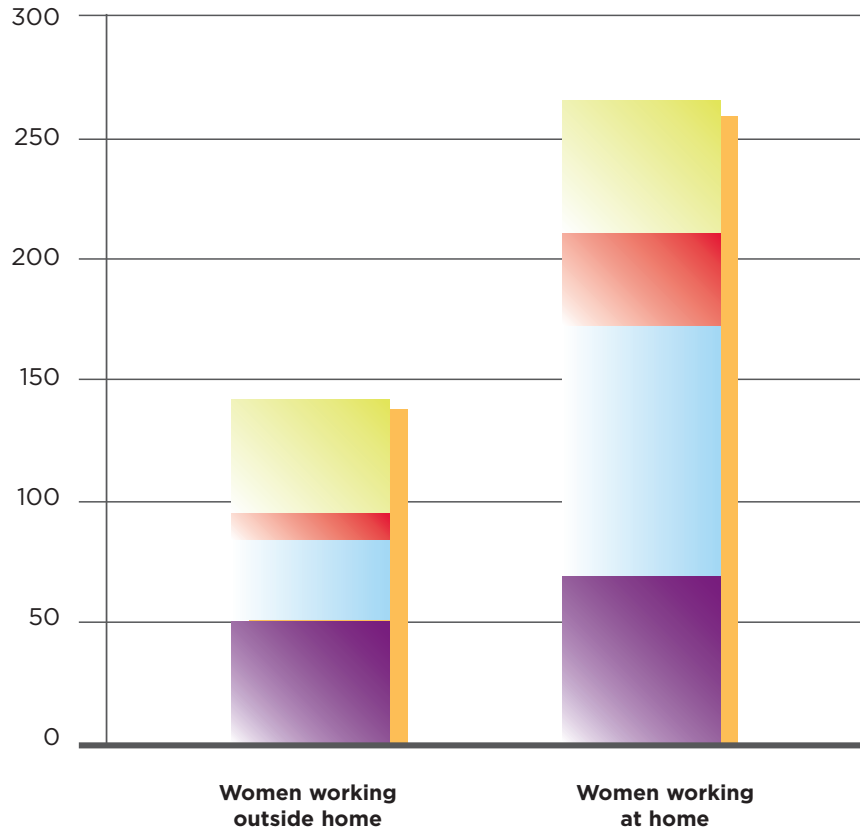
**FACT:** Women are actually lengthening the workday and purposefully blending personal and work activity at the office. The Internet makes it all possible.

## WORKING UNDER-TIME





The truth is that American women are working more hours (over one-third say they are working more within the past year) and taking less of their vacation time than in years past...but are they counting working hours...or just working? Women have developed the concept of “working under-time” — spending extra time in the office to compensate for using the Internet for personal reasons throughout the day. During the listening sessions, over half of employed women admitted or even bragged that they spent time online for non-work-related activities, including banking, emails, IM-ing, planning travel and events, coordinating their personal lives and playing games. They feel justified. It’s what allows them to get through the day. Going online for fun has replaced the walk around the block or the coffee break. It’s the filler between meetings, phone calls or other assignments. Women say they feel more productive...but it’s productivity defined differently. They’ve figured out how to be productive in their personal lives at the same time they are productive in their work lives. The average woman working outside of the home is spending more than two hours a day online — over 40 minutes on personal activities. Women working from home spend an average of four hours a day online, almost half for personal activities.



## ROLE OF INTERNET AT WORK CONTINUED



**Forty-seven percent of working women use their personal Internet connection to conduct work during non-working hours. Twenty percent of women have checked their work email while they were on vacation — they've earned the time they spend online at the office.**

-  Minutes per day composing and sending work-related emails at work
-  Minutes per day composing and sending personal emails at work
-  Minutes per day on the Internet at work for work-related matters
-  Minutes per day on the Internet at work for personal matters

## THE EMOTIONAL IMPACT OF THE INTERNET

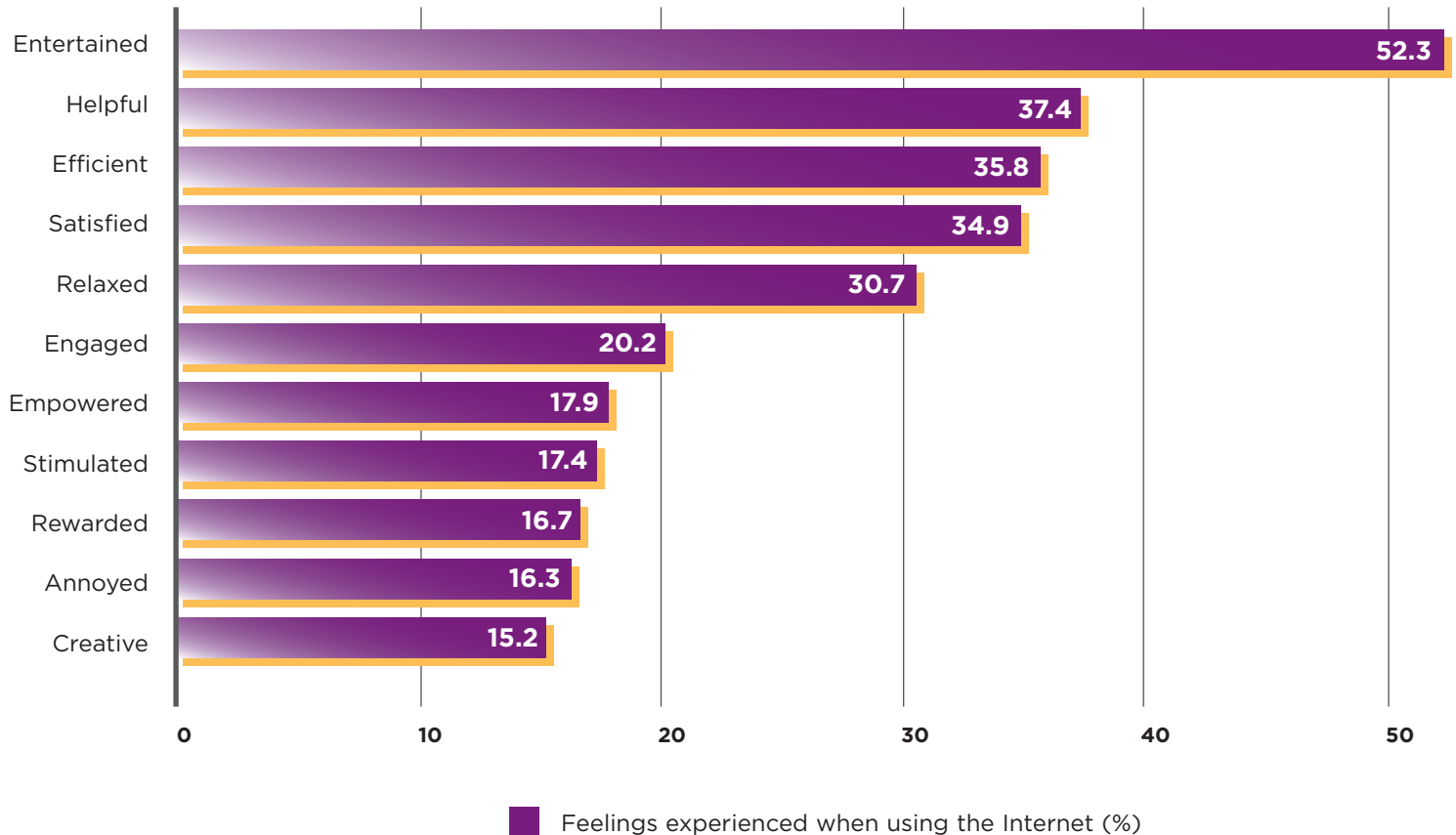
**MYTH:** The Internet is a “cool medium” and not necessarily a good channel for emotional connection.

**FACT:** Women report strong emotions relating to their use of the Internet, indicating a deeper level of emotional engagement than previously thought.

Using the Internet instills a range of emotions in women. While an overwhelming percentage — 96 percent of women — say they frequently feel positive emotions while online, the Internet can instill some negative emotions online as well. As women continue to become familiarized with Internet functions and navigation, their frustration will be reduced when it comes to meeting their online objectives.

## THE EMOTIONAL IMPACT OF THE INTERNET CONTINUED

*Question:* Which of the following thoughts or feelings do you experience most often while using the Internet?



## ONLINE BEHAVIOR

**MYTH:** Men are “players and surfers” while women are “seekers and taskmasters” on the Internet.

**FACT:** Women elaborated on their use of the Internet during the listening sessions. They are using the Internet for a wide variety of purposes that span a range of activities, from fun to focused — entertainment, research, logistics planning, price comparison, mate hunting, tips on food, child-raising, health, and more. They are constantly “surching,” a hybrid of surfing and searching that’s focused on a number of their favorite sites.

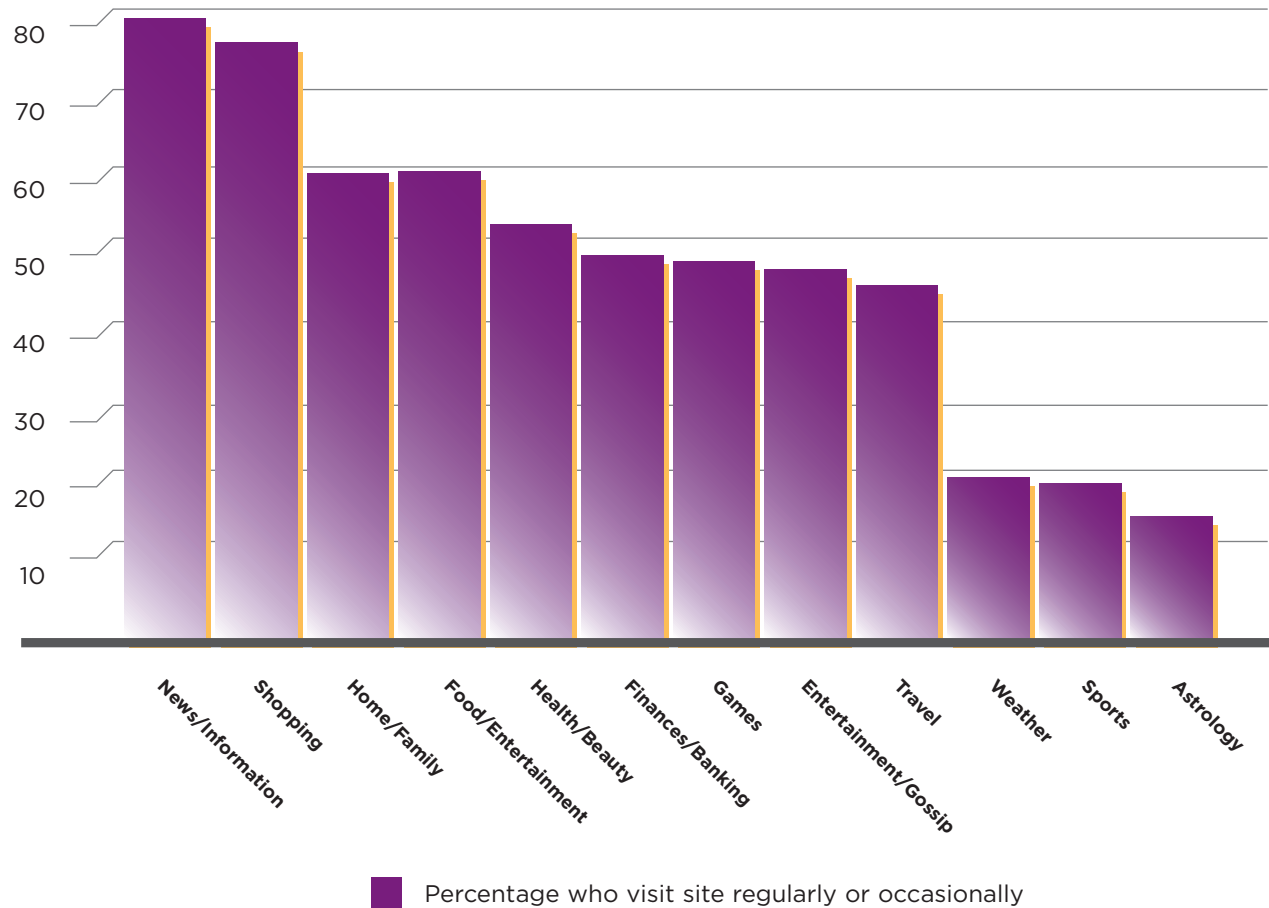
There’s a wide variety of sites available to women online, and while it’s virtually impossible to cover every inch of ground women are visiting on the Web, there are several broad categories that women are visiting frequently. The sites that were most frequently mentioned by women were not what could be found in typical women’s magazines: news, weather, shopping, games and finance topped the list. It turns out, a higher percentage of women visit sports sites than astrology sites.

This change may be occurring due to the expanding definition of what women now consider “fun” on the Internet. Even the most mundane tasks, such as paying bills, have become less of a chore due to the Internet.

“Before the Internet I didn’t keep a check register, I didn’t look at my bank statements. Now, I’m online everyday seeing what checks cleared. It’s almost like an obsession.”

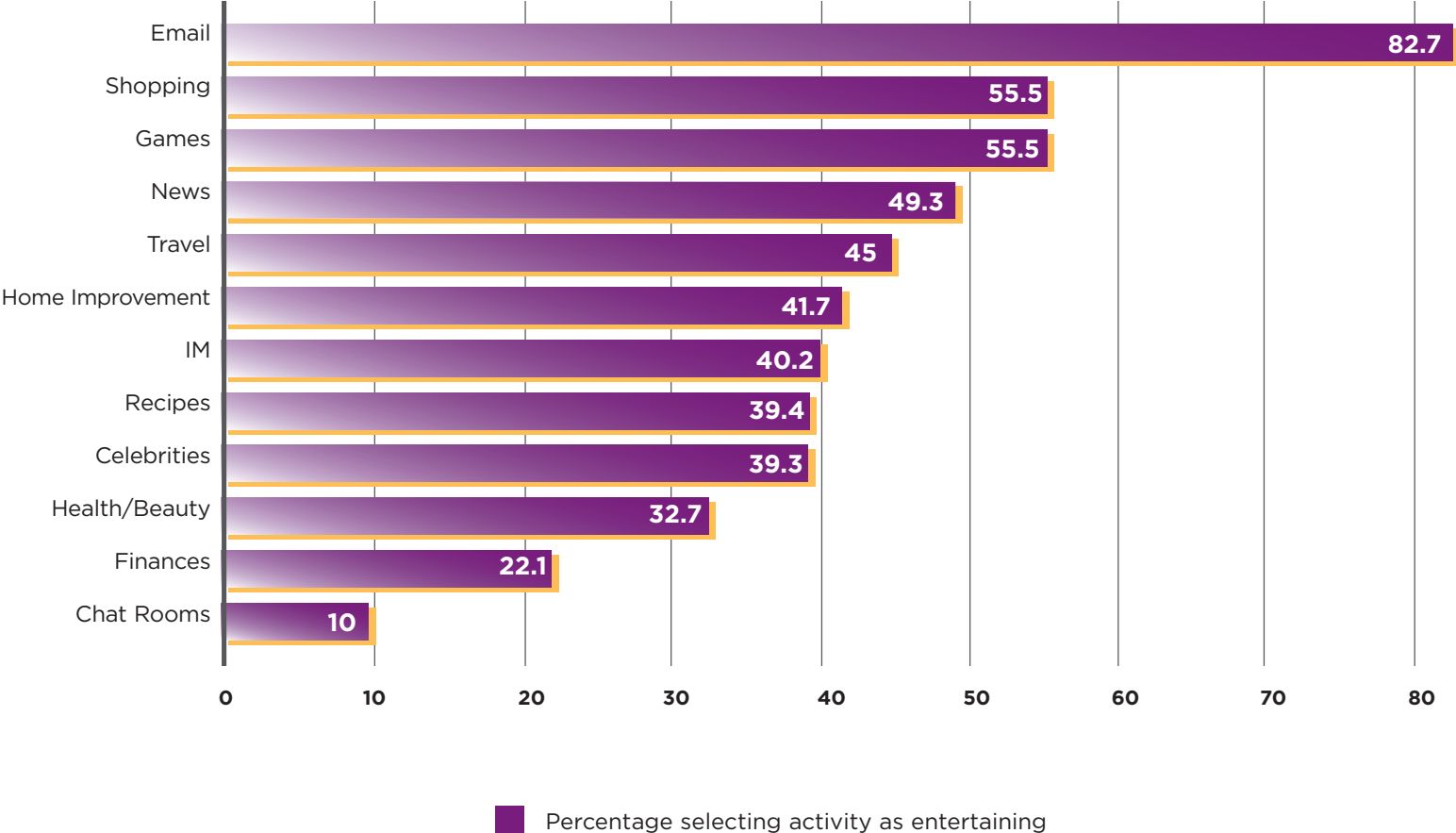
## ONLINE BEHAVIOR CONTINUED

*Question:* How frequently do you visit the following types of websites?



ONLINE BEHAVIOR CONTINUED

*Question:* Which of the following online activities do you find entertaining?



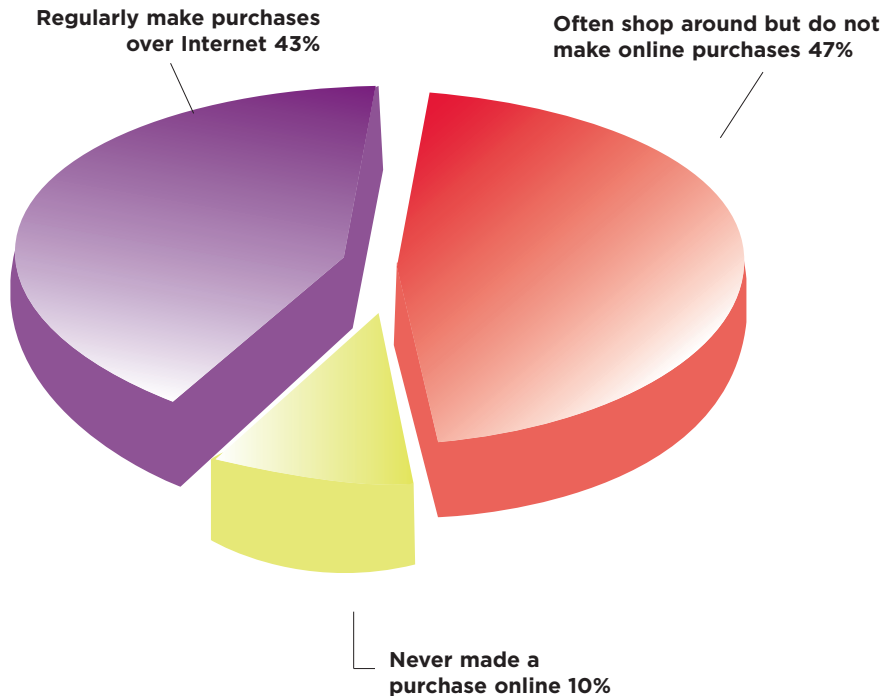
## THE RETAIL ENABLER

**MYTH:** Women will make a handful of “everyday” purchases online, while also occasionally researching a “big-ticket,” high-consideration purchase.

**FACT:** The Internet has become a routine, consistent part of the total shopping experience. Women browse the Internet regularly for items they’ll later buy online or at retail stores, while also researching a wide range of products including electronic and technology products.

Women can purchase nearly anything they want online today. Simple return policies, well-stocked online stores and safer encryption technology have helped to make Internet shopping more commonplace. Women are no longer hesitant to purchase items “virtually.” Over half of respondents say they are shopping online more than they used to, and 43 percent of women are regularly purchasing items over the Internet. Even those that are not currently buying online are still doing their research online — nearly half (47 percent) say they often browse but do not necessarily make a purchase online. They’ll look to see what the sales are, do their price comparisons and then go to the retail store. Pre-buying online research is also particularly common when looking into electronics and technology purchases.

## THE RETAIL ENABLER CONTINUED

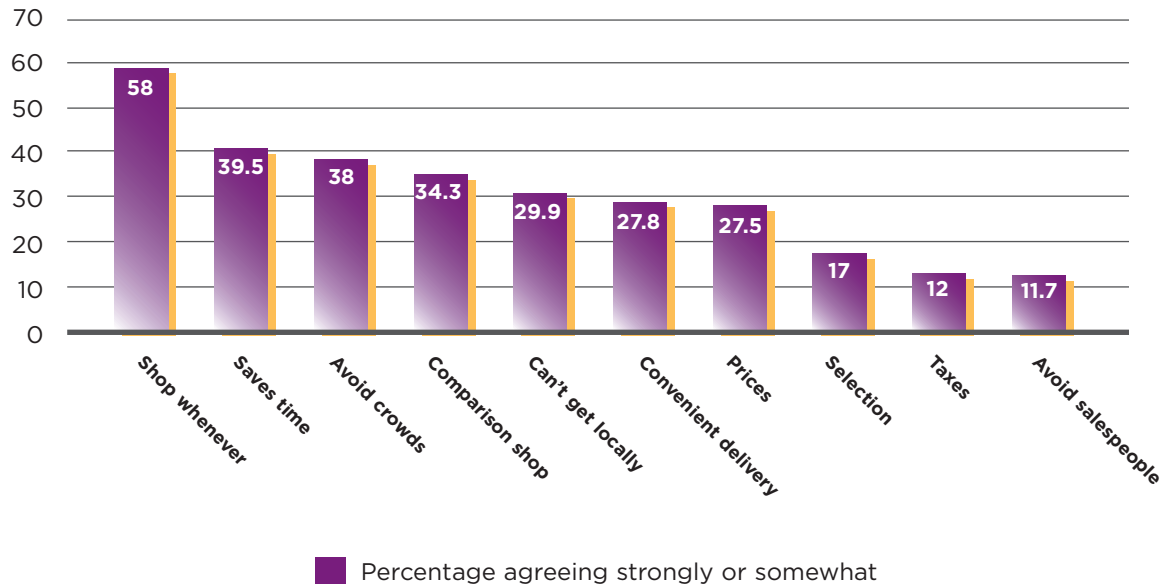


“You go online, go to [major dept store] you go to the department and order right then. Now if you go to the store, the only department where there is help is the cosmetics department. You go to any other department and you find the beautiful blouse and then you look, where in the hell is the check out counter? And there are two clerks and they are talking to each other and they totally ignore you. Maybe if you clear your throat enough they say, “Oh did you want something?” By then you are ready to rip the sweater to shreds...I don’t want to go in. You go online, type “blouse” in and they all come up. Go to the store and the blouses could be on five different floors.”



## THE RETAIL ENABLER CONTINUED

*Question:* Which of the following, if any, are the main reasons that you prefer to shop on the Internet?  
(Asked among respondents who prefer shopping online.)



Convenience, time saving and avoiding crowds were cited as the strongest reasons women prefer to shop online. The ability to comparison shop and get a wider selection than is locally available are also important drivers of online shopping.

## CHILDREN'S USAGE OF THE INTERNET

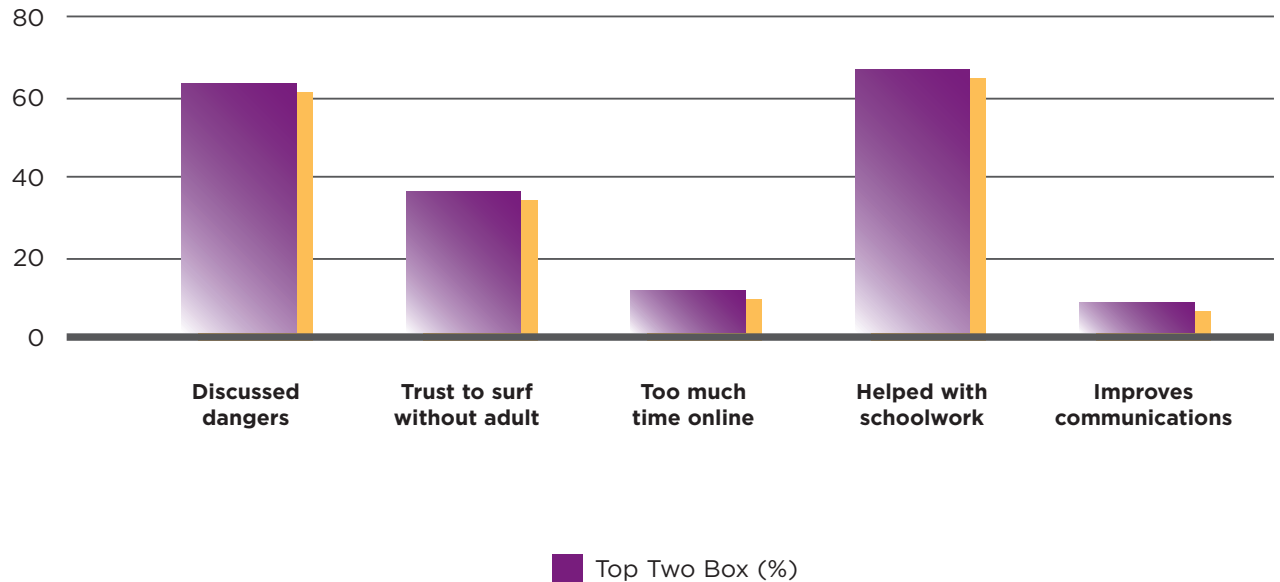
**MYTH:** The Internet has replaced video games and television as mindless activity for children.

**FACT:** Although moms still express some concern over their children's usage of the Internet, this is overshadowed by the benefits it reaps in terms of schoolwork and communication.

Almost two-thirds of moms (65 percent) feel the Internet has helped their children with schoolwork. The majority are also concerned about the dangers of the Internet, with 62 percent having discussed this with their children. Thirty-nine percent of moms have monitoring software in place that prevents their children from going to certain websites. Thirty-six percent say they trust their children to surf the Internet without adult supervision, but less than one-third (30 percent) have actually allowed their children to surf by themselves. They are also taking precautions to keep their children safe by keeping computers in open areas where they can check on them frequently. Only 12 percent of moms feel their children spend too much time online, while 8 percent actually feel that the Internet has helped to improve communication with their children.

## CHILDREN'S USAGE OF THE INTERNET CONTINUED

*Activity:* Please indicate how accurately each of the following statements reflects your feelings regarding your child/children's use of the Internet.



## INSIGHTS FOR MARKETERS

So what specific insights and recommendations can marketers take away from the data presented here? Let's review some of the high points:

- In presenting our eight personality profiles of the woman Internet user — Cassandra, Cowgirl, Debutante, Detective, Diva, Shopkeeper, Socialite and Voyeur — we've presented the marketer with a psychographic framework for understanding and speaking to women online. How to make use of this information? In shaping your creative messages, ask which of these profiles your product is likely to connect with. A great online advertisement might appeal to the Cowgirl's sense of adventure, the Voyeur's curiosity and the Cassandra's need to be the first on her block to secure new information or own a new product. The same framework can be applied to media selection and placement: Where am I likely to reach women when they're busy living these profiles online? In search? In personals? On a news page? While shopping? While researching critical information? It's a whole new way to think about women online, and a fresh new look at media and creative planning.
- What to make of the 38-Hour Day? This finding demonstrates beyond all question that women live a multi-tasking existence. And their media usage is no exception. The image of a woman using the Internet in a vacuum is as dated as the prototypical 1950s family congregating around the TV set together. Women actively use the Internet as they perform a variety of other tasks and as they consume other media. We encourage marketers to continually explore how online advertising compliments and enhances their total communication goals as it interacts with other media. Think about how your TV commercial will be enhanced by a strong presence on the Web. After all, your women customers are already consuming them side-by-side. Women don't consume media in a vacuum, so why plan your media and marketing that way?
- We've established that the Internet is not a "spare time" activity — it takes place constantly and at all hours. Knowing that women are using the Internet at varying times of day and while multi-tasking, we're all challenged to make our ad messages direct, compelling, benefit-driven and respectful of the user's time and attention. Does this mean that online advertising should only be benign and discrete? Absolutely not. But it should work within the context of a woman's busy life and earn the attention it demands by entertaining, informing or meeting a need.

## INSIGHTS FOR MARKETERS CONTINUED

- We now know that there is an unwritten pact between women and their employers regarding use of the Internet at work for personal tasks: I'll work more hours, but I'm going to spend some of that time looking after my own affairs. This may sound simple, but it carries profound implications for marketers — nothing less than the rebirth of the daytime women's audience. Since women moved en masse into the 9-5 workforce in the 1960s, reaching them during the day has just gotten more and more difficult, and daytime TV has shriveled. Now, after a 30-year absence, that audience is back "on-screen" and ready to hear from the marketers who are innovative enough to reach them.
- An enduring myth — that while men go online to explore, women are strictly utilitarian — has been put to rest. We now know that even when women go online to find something or to answer a question, they don't just search, they "surch." Their Internet use is serendipitous and adventurous. The message to marketers is simple: It takes more than just search marketing or a great website to get the job done. Smart, widely-distributed Internet advertising — a consistent presence in many of the places she'll go online — is the key to reaching "the Surcher."
- It might seem logical to think of the Internet as a "cool" or "dispassionate" medium. But it's just not true. The Internet experience elicits strong feelings and emotions among women. The invitation to marketers is to begin translating the emotive, entertaining and inspirational aspects of your brand story to the Web. When women are online they feel passion, connection and outrage; they laugh, cry and bond. If you're not connecting online with them with those sides of your brand, then you're missing an opportunity.
- When thinking about women's online buying habits, it's easy to think of the Web as just another store or retail channel. But women don't see it that way. They see one big, seamless retail world. They may browse online on Monday and buy offline on Tuesday...or vice versa. They expect the whole experience to be pre-integrated for them, and they expect you to do it. The invitation and challenge is to go even further in bringing together the tactile offline and online parts of the shopping experience; to engineer them as seamlessly as women use them.
- When it comes to Internet use by their children, women are neither overprotective nor unconcerned. They understand that the Internet is going to play a huge and important role in their kids' lives; so important that they insist on working closely with them as they enter the digital world. Marketers who hope to earn the respect and trust of moms should know that they're "POS" (Parent-Over-Shoulder) in their kids' Internet lives.

## CONCLUDING THOUGHTS

**Reaching women online will require greater insight, a better understanding of their attitudes and values, and the willingness to engage in an empowering dialogue.**

*Real Women. Digital World.* is not intended to be the last word in understanding the relationship between women and the emerging digital world in which they live. It is, however, an important first step toward a deeper, more intricate interpretation.

Making assumptions about consumer behavior is always a perilous activity. As noted in this report, much of the conventional wisdom about how and why women use the Internet may actually be wrong. What is certain is that the digital dialogue between marketers and their female customers will never be the same. Reaching women online will require greater insight, a better understanding of their attitudes and values, and the willingness to engage in an empowering dialogue.

We hope that *Real Women. Digital World.* will be a positive stepping stone for marketers as they move toward that new reality.

## Project Directors

Mary Lou Quinlan, Founder & CEO, Just Ask A Woman

Brenda McFarland, Executive Vice President, TNS Media Research

Michele Madansky, Ph.D., Vice President, Research Director, Yahoo!

Kate Sirkin, Senior Vice President, Global Director of Strategic Intelligence  
Starcom MediaVest Group Worldwide

Research inquiries may be directed to:

Michele Madansky, Ph.D.  
VP Research Director  
Yahoo!  
701 First Avenue  
Sunnyvale, CA 94089  
Women-research@yahoo-inc.com

Kate Sirkin  
Senior Vice President, Global Director of Strategic Intelligence  
Starcom MediaVest Group Worldwide  
35 West Wacker Drive  
Chicago, IL 60601  
Kate.Sirkin@smvgroup.com

**“We have four computers.  
I’m a stay-at-home mom and I’m obsessed.  
I’m on mid-morning. I’m on in the  
afternoon and then in the evening time,  
till the wee hours of the morning.”**

“You’d definitely have to pry the Internet  
out of my cold dead hands.”

**“With the TV you can go mindless.  
That’s what I use it for — you don’t have  
to think too much. The Internet has more  
but you have to pursue it and be proactive.”**

“My husband uses it as a research tool.  
He gets it...done. I get in and get lost.  
If I started for specific info I’ll get it  
but I go to other places first.”

**“I don’t want to go in  
[to the department store].  
You go online, type “blouse” in  
and they all come up. Go to the store  
and the blouses could be on  
five different floors.”**

“Before the Internet I didn’t keep a check  
register, I didn’t look at my bank statements.  
Now, I’m online everyday seeing what  
checks cleared. It’s almost like an obsession.”