Women as Buyers
A Quad Infographic Study
OVERVIEW

Nobody can deny the impact women have on our economy. Widely recognized as the “Household CEO,” they know how to plan, strategize, manage, delegate, budget, and yes, spend. But today’s empowered women are much more than just stereotypical moms. And their impact on the U.S. economy far exceeds groceries, back-to-school clothing and household items. This pictorial study will guide you through key behavioral aspects, buying and media preferences of a gender that demands the attention of serious marketers everywhere.

• While women account for roughly 50% of our population, their spending power exceeds that of men as a whole.
• With an estimated $40 trillion global spending power, women lead in the battle of the retail sexes.
• Women are more likely to clip than click coupons. Makes sense, since over 90% of coupons are still print, but mobile usage & distribution is on the rise.
• Women use mobile devices mostly for accessing email, social media and gaming. They prefer to use PCs or laptops to research and shop.
• Women are social and highly active. To reach them, you have to walk their walk and talk their talk – in the circles where they hang.
• While women may earn less than men, they still make the majority of purchase decisions.
• The unique characteristics and savvy shopping behavior of today’s modern woman requires a rich multi-channel media mix to reach her in a meaningful way.
WOMEN

Leading the She-conomy

Though often stereotyped as highly emotional individuals who perpetually appear in soft focus wearing pastels—and overshadowed by male counterparts—the female shopper has waaay more marketing savvy, disposable income, and say over that income (or disposition) than many marketers give them credit for. So while incomes may still lag slightly behind men, the gap is closing, and women’s economic might is evident in the fact that they crush it in HH purchase decisions.
Women – A Snapshot

126 MILLION STRONG!
Ages 18+ in the U.S.

63%
Caucasian

51%
KIDS
(77% ages 6-17)

50%
Married

41%
In ‘Burbs

51%
College Grads

28%
Lived In Same Place 5-15yrs

66%
No Kids @ Home

34%
$75K+ HH Income

52%
Employed

LIFE-CHANGERS
• Marriage
• Divorce
• Children
• Career
• Relocation

66%
Homeowners

Source: Quad Customer Focus® 2016 Research Study
Though men get much of the attention and still have slightly higher earning power, population-wise, we’re at about a 50/50 split in the U.S. And as far as shopping power & discretionary income are concerned...well, targeting women means looking beyond the pink—and even the green! This is a gender with a colorful range of tastes and buying preferences.

WOMEN

Time to De-Genderfy the Dollar
WOMEN – Time to De-Genderfy the Dollar

Women’s Global Buying Power by 2018 = $40 Trillion

Source: The She-conomy.com

Women account for 85% of ALL consumer purchases

• 91% of new homes
• 66% of PCs
• 92% of vacations
• 80% of healthcare
• 65% of new cars
• 89% of bank accounts
• 93% of food
• 93% of OTC pharmaceuticals

Source: The Boston Consulting Group (BCG)

US women spend about $5 Trillion annually (more than half the US GDP!)

Source: The She-conomy.com

82% ARE CHIEF HOUSEHOLD GROCERY SHOPPER

Source: Quad Customer Focus® 2016 Research Study
Yes, we all know the shop-till-you-drop stereotype that women have shouldered practically since money was first minted. But who doesn’t like the thrill of a value? Women certainly do—they’re as savvy a shopper as you’ll find. And although they like their discounts in many ways, shapes and forms, the clip slightly edges the click.
Where Women Prefer to Get Coupons & Offers

- 58% Direct Mail
- 39% Email
- 34% In-Store Display
- 22% Catalogs
- 19% Mobile
- 17% Magazine Ads
- 48% Ad Inserts
- 37% In Stores
- 31% Internet Ads

Women’s coupon use outpaces that of men in every channel except internet ads.

Source: Quad Customer Focus® 2016 Research Study
### COUPONS WOMEN REDEEMED – PAST 30 DAYS

<table>
<thead>
<tr>
<th>Source</th>
<th>WOMEN 18-34</th>
<th>WOMEN 35-49</th>
<th>WOMEN 50-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Mail</td>
<td>45%</td>
<td>52%</td>
<td>57%</td>
</tr>
<tr>
<td>Ad Insert</td>
<td>26%</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>Email</td>
<td>30%</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>Internet</td>
<td>35%</td>
<td>31%</td>
<td>23%</td>
</tr>
<tr>
<td>In-Store</td>
<td>18%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Mobile App</td>
<td>23%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Magazine</td>
<td>9%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Mobile Text</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Catalog</td>
<td>10%</td>
<td>16%</td>
<td>14%</td>
</tr>
</tbody>
</table>

As age increases, so does clipping.

Source: Quad Customer Focus® 2016 Research Study

Use **Multiple Sources** (print & digital) for Coupons and Discount **Savings**.
Though it may sound odd, the key to marketing to women is...don't market to women! That's right. At least not to their stereotype.
So What’s Her Story?

91% of women say advertisers don’t understand them¹

68% of women want advertised offers personalized to them based on needs, interests and purchase history.²

Authenticity is key for digitally-savvy women

61% say if “It doesn’t feel genuine,” they won’t engage with an influencer’s sponsored social posts³

Social Media Advertising Messages Work for Women:

54% have purchased a product/service from an influencer’s post

45% have followed a brand from an influencer’s sponsored post³

Consistency Influences Me

59% say sponsored posts feel fake/inauthentic when inconsistent with an influencer’s feed³

There will always be a battle between the sexes. Who’s smarter? Who’s richer? Who’s the fairest of them all? But when it comes to women vs. men in the shopping cart derby, the best bet for your marketing buck may surprise you (hint: men lose).
Although women and men both pack a lot of buying power, identifying differences beyond the obvious and engaging women as equals are crucial to marketing success.

Source 1: Bigcommerce survey: Consumer shopping trends 2017; Source 2: Experian study 2016; Source 3: Quad Customer Focus® 2016 Research Study; Source 4: U.S. Bureau of Labor Statistics; Source 5: U.S. Census Bureau
WOMEN vs. MEN – Who Wins the Pocketbook Battle?

WOMEN ARE MORE LIKELY TO TAKE MULTIPLE MEDIA TO THE STORE

<table>
<thead>
<tr>
<th>Media Type</th>
<th>WOMEN</th>
<th>MEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>PrintCoupons</td>
<td>51%</td>
<td>41%</td>
</tr>
<tr>
<td>Newspaper Inserts</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Mobile Coupons</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Mailbox Ad Insert</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Email Printout</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Newspaper Ad</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Website Printout</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Catalog</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Magazine</td>
<td>7%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Women pay attention to media more than men in every category, except for radio.

54% Use Multiple Media for offers & coupons 20% more than men

52% of Millennial women are more likely to get offers from multiple media than Millennial men

54% Ad Inserts

Source: Quad Customer Focus® 2016 Research Studies
WOMEN vs. MEN – Who Wins the Pocketbook Battle?

7-Day Media Consumption

WOMEN WIN AGAIN!

Watch Primetime TV

Surf Internet

Read Mobile Content

Use Social Media

Watch Mobile Video

Read Magazine

Read Newspaper

Read Email Offer

Read Direct Mail

Read Ad Inserts

Read Catalog

84% 80% 90%
82% 79% 79%
75% 70% 85%
83% 70% 85%
67% 56% 56%
67% 56% 56%

18-34 35-49 50-64

83% 70% 85%
67% 56% 56%
75% 70% 85%
83% 70% 85%

18-34 35-49 50-64

83% 70% 85%
67% 56% 56%
75% 70% 85%
83% 70% 85%

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75% 70% 85%
83% 70% 85%

18-34 35-49 50-64

Source: Quad Customer Focus® 2016 Research Studies
WOMEN vs. MEN – Who Wins the Pocketbook Battle?

Average Miles Traveled to a Store

**GROCERY STORE**

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>9.6</td>
<td>7.6</td>
</tr>
<tr>
<td>35-49</td>
<td>8.9</td>
<td>8.0</td>
</tr>
<tr>
<td>50-64</td>
<td>10.9</td>
<td>8.4</td>
</tr>
</tbody>
</table>

**RETAIL DEPARTMENT STORE**

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>15.7</td>
<td>11.0</td>
</tr>
<tr>
<td>35-49</td>
<td>15.6</td>
<td>12.9</td>
</tr>
<tr>
<td>50-64</td>
<td>17.4</td>
<td>13.6</td>
</tr>
</tbody>
</table>

WOMEN ARE MORE LIKELY TO HIT THE ROAD FOR RETAIL DUE TO VARIOUS MEDIA:

- Ad Inserts
- Direct Mail
- Email
- Mobile

Source: Quad Customer Focus® 2016 Research Studies
While definitely heavy users of mobile, women still prefer PCs to smartphones or tablets when shopping. But like pretty much everyone else, that’s rapidly changing as mobile ad spend and retail push increases.
WOMEN & DIGITAL – Femme Tech

WOMEN & DEVICES

- Own Smartphones: 58%
- Own Tablets: 6%
- Made NFC Mobile Payment: 74%

TRENDING

DIGITAL ON THE RISE

Digital ad spend is forecast to grow over the next few years, tapering off as the market matures. However, remember that women prefer PC to mobile shopping for most industries.

Source: eMarketer

2015

- Digital Ads: $59+ Billion
- Mobile: 50% of Digital Ads

2019

- Digital Ads: $103+ Billion
- Mobile: 75% of Digital Ads

WOMEN & DIGITAL

- 64% Ignore Internet Ads
- 22% Enable Ad Blocking Software
- 20% Scanned QR Code to Access Website
- 16% Used Text Offer (past 30 days)
- 39% Want Mobile Coupons (highest preferred digital method, 3rd behind DM & Inserts)
- 6% Made Purchase w/QR Code

Source: Quad Customer Focus® 2016 Research Study
KEY DIFFERENCES IN FEMALE BUYING

<table>
<thead>
<tr>
<th></th>
<th>WOMEN</th>
<th>MEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own Smartphones</td>
<td>74%</td>
<td>76%</td>
</tr>
<tr>
<td>Visited Store per Ad Insert</td>
<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>Visited Store per DM</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Online Purchase Influenced by Social Media</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Online Purchase Influenced by Mobile Content</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Women prefer to shop in-store vs. online**

Women: 2:1

**HOW WOMEN USE SMARTPHONES**

- 26% Email
- 23% Social
- 14% Gaming
- 8% Photos
- 6% Web Surfing
- 5% Shopping
- 3% Voice
- 15% Other


**MOTHERS MORE LIKELY TO ACCEPT MCOMMERCE/MOBILE ADS**

- Willing to accept ads sent to mobile phone if receiving something of value in exchange
  - Mothers: 26%
  - Total Women: 19%

- Likely to purchase products seen advertised on mobile phone
  - 19%

- Interested in receiving ads on mobile phone
  - 11%

CUSTOMER FOCUS RESEARCH METHODOLOGY.

Quad Customer Focus® is a quantitative annual study of 2,500 adults, a solid representative sample of demographic U.S. Census estimates. The research study provides current and historical views on singular and integrated media usage, as well as winning marketing strategies across numerous industry segments. The study reveals consumer shopping habits and media preferences by a number of different demographic elements. The data can be viewed using various cross tabulation methods, including combinations of demographic variables to create custom customer profiles. Additionally, the study tracks the media usage and shopping behaviors of shoppers at 40 of the Top 200 Retail brands.

Two-thirds of the participants are contacted by telephone. A random digit dial method of telephone interviewing is used. This method ensures that a representative sample of the market will be interviewed. The phone numbers are computer generated randomly, based on all working prefixes in the area specified. This sample includes both listed and unlisted households, but deletes business numbers. Researchers are exempt from the Do Not Call List and so those households are contacted as well.

Interviewers attempt four callbacks on different days and times to ensure each randomly selected household is more likely to be contacted. Interviews are conducted 7 days a week, Monday-Friday from 5-9 p.m. and on weekends from 12 noon-5 p.m. This is done to avoid getting too many retirees, homemakers, unemployed and students in the mix; and also insure the study includes high income and white collar workers.

Households that do not have a landline are also contacted via email or by cell phone and directed to an online survey, which makes up about a third of the study participants.

Also, after each night of interviewing, the results are reviewed against Claritas data for annual age, income, ethnic background and population distribution figure, to ensure our data match the demographics of the survey area just called.

The study has been conducted annually since 2001, and has been expanded and modified to reflect the growing number of media channels used to engage consumers today. The study has been conducted by Marshall Marketing, the leading provider of quantitative and qualitative research for the media industry since 1985. The company is based in Pittsburgh, with offices in Charlotte, Knoxville, Orlando, Raleigh, Seattle & Spokane. They study over 100 markets annually, conducting 75,000 interviews each year. Media clients include: TV and radio stations, cable, circular and direct mail printers. Industry verticals they provide custom research for include financial institutions, auto dealers, furniture stores, hospitals, restaurants, grocery stores and others.

See how we can help:

contact us at betterways@qg.com

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