



web2.0
WOMEN

INTRODUCTION TO FACE AND MINDBUBBLE



FACE

Face brings together brands and consumers to co-create insights, ideas and advocacy. We believe that the customer is always right so they should stay involved in every stage of the innovation and marketing process. We help clients like Boots, Dove, Sure and Pepsico to profile consumers, generate insights, develop new products, create UGC advertising & content and spread word of mouth.



MIND BUBBLE

Face has developed Mindbubble, an on-line collaboration community for women aged 25-45 yrs. Mindbubble enables brands to collaborate with women from different backgrounds in project teams and each member of a team can share their ideas, opinions and creativity with other team members (including brand owners) to complete project tasks using a range of community tools. These include on-line focus groups, on-line and mobile surveys, multimedia diaries and virtual creative studios.

Job Muscroft

Managing Director, Face





FOREWORD

If you're a male executive reading this report then beware because as this year's Boots ad campaign hails "Here Come The Girls".

Gone are the days when geeky men or spotty youths ruled the web. As this report shows the rise of Web 2.0 women is upon us. Women aged between 25-34 are spending more time now on-line than men and the number of women becoming regular users of the internet is growing faster than their male counterparts. Facebook is a good example of this trend. There are 10m people on Facebook in the UK and 64% of them are women; a number that is equal to their female tally worldwide. The 35 and up crowd now account for more than 41% of all Facebook users.

The feminisation of the web is a natural continuation of what is happening in broader society. In the US women now make 80% of consumer spending decisions, including cars, computers and financial products. It is the first step to the creation of a matriarchal society where the female uses her economic and social power. And although this trend is most pronounced in the US, Britain is not far behind.

It is why companies such as Ask.com have given up their fight against Google and Yahoo and are re-inventing themselves as a female focused on-line query specialist. It is also why according to a Guardian report earlier this year that in terms of audience, the fastest growing categories online in 2007 were women's communities

and political sites; it also explains Yahoo's preparations to launch a major new community site aimed at women aged 25-54.

It is also why at Face we have launched www.mindbubble.co.uk, the first collaboration community in the UK for women aged 25-40. The development of mindbubble including its name, identity and the concept has been driven by mindbubble women. Seeing this first hand has highlighted a huge amount of untapped creativity that brands could be harnessing on a daily basis. It also points to a growing opportunity to see Web 2.0 women not just as potential customers but as sources of inspiration, creativity and influence who can help move a brand forward. It is something the Laundry division of Unilever have already spotted by co-creating with key Web 2.0 women to innovate new products and new product variants.

The growing trend of web feminisation and the increasing desire for web 2.0 women to collaborate and be heard means that brands need to look at the potential offered by this group of consumers with a fresh set of eyes."

Andrew Needham

Founding Partner, Face



METHODOLOGY

In order to find out the ways in which women's usage of the web was changing and growing we naturally went online to see what was being said by women and about women.

In addition we spoke to 20 women aged 25-40 in a series of online and offline group discussions - finding out something about the role the internet played in their lives and what they were getting up to online.

The findings in this summary are drawn from a combination of this primary and secondary research.

Philip Mcnaughton

Research Director, Face

MATRIARCHAL SOCIETY

"IN THE US, WOMEN NOW MAKE, 80% OF CONSUMER SPENDING DECISIONS, INCLUDING CARS, COMPUTERS AND FINANCIAL PRODUCTS. IT IS THE FIRST STEP TO THE CREATION OF A MATRIARCHAL SOCIETY WHERE THE FEMALE USES HER ECONOMIC AND SOCIAL POWER. WHILE THE TREND IS MOST PRONOUNCED IN THE US, BRITAIN, SCANDINAVIA AND FRANCE ARE NOT FAR BEHIND"

MICHAEL J SILVERSTEIN

VICE PRESIDENT, THE BOSTON CONSULTING GROUP

"TREASURE HUNT: INSIDE THE MIND OF THE NEW CONSUMER"

"FEMALE PURCHASING POWER UP BY 50% OVER LAST 20 YEARS"

MARKS & SPENCER FEMALE SPENDING REPORT 2005



THE INTERNET IS A GENDER NEUTRAL SPACE

"IN 2007 WOMEN AGED 18-34 ACCOUNTED FOR 21% OF ALL TIME SPENT ON COMPUTERS BY BRITONS. THAT IS, FOR EVERY HOUR THAT BRITONS SPEND ON COMPUTERS, 13 MINUTES ARE ACCOUNTED FOR BY 18-34 YEAR OLD WOMEN" WWW.MARKETINGCHARTS.COM

"14 HOURS, - PER WEEK"

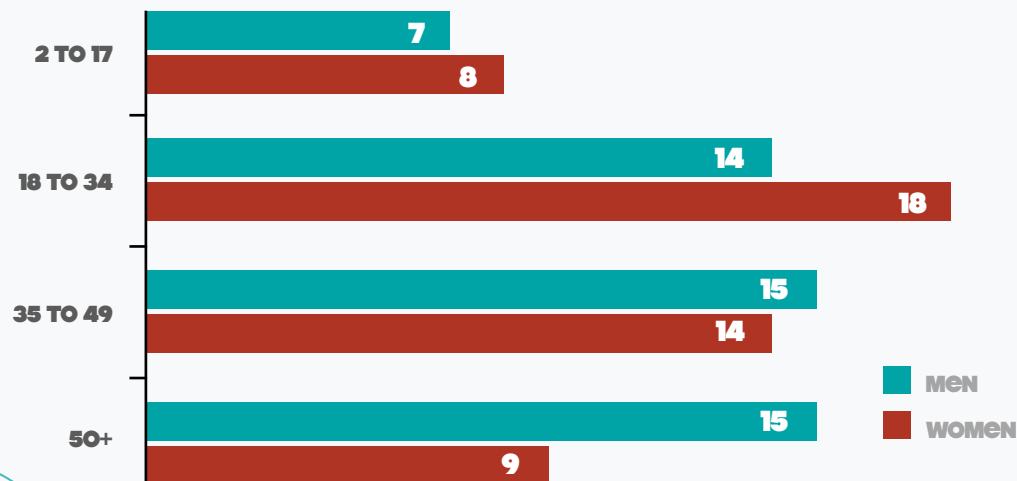
JO - 32

"EVERY DAY AND I PROBABLY SPEND FROM HALF AN HOUR TO 3 HOURS"

HARRIET - 36

"I ONLY STARTED USING THE PC 2 YEARS AGO AND I HAVE NEVER LOOKED BACK"

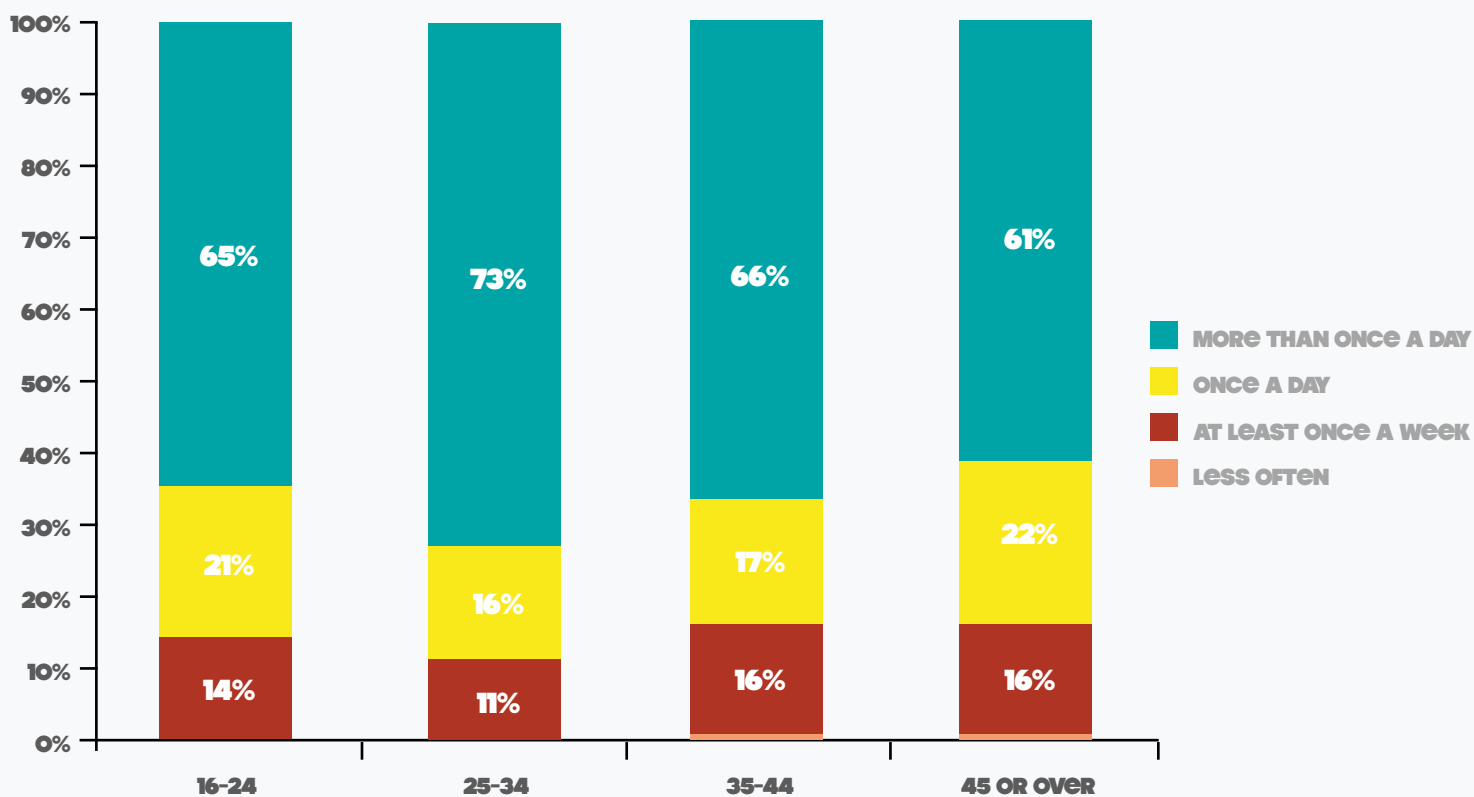
TAMARA - 38



HOW THE UK INTERNET POPULATION IS COMPOSED BY AGE & GENDER MARKETING CHARTS – MARCH 2007



AND IT'S BECOMING A ROUTINE ACTIVITY



THE RISE OF WEB 2.0 WOMEN

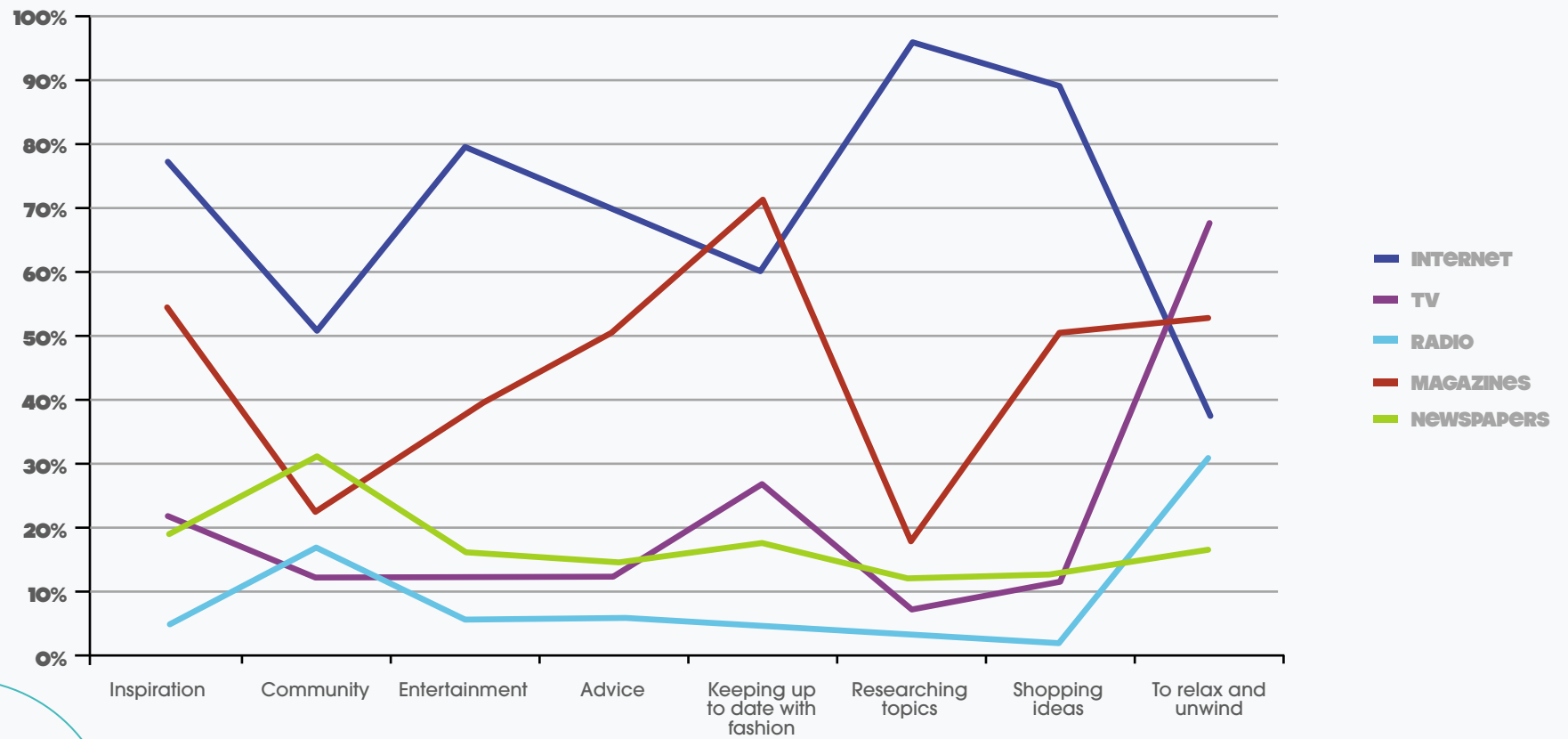
"WOMEN AGED BETWEEN 25-34 ARE SPENDING MORE TIME ONLINE THAN MEN, TOGETHER WITH MORE OVER-50S LOGGING ON TO THE INTERNET."

GUY PHILLIPSON CHIEF EXEC IAB

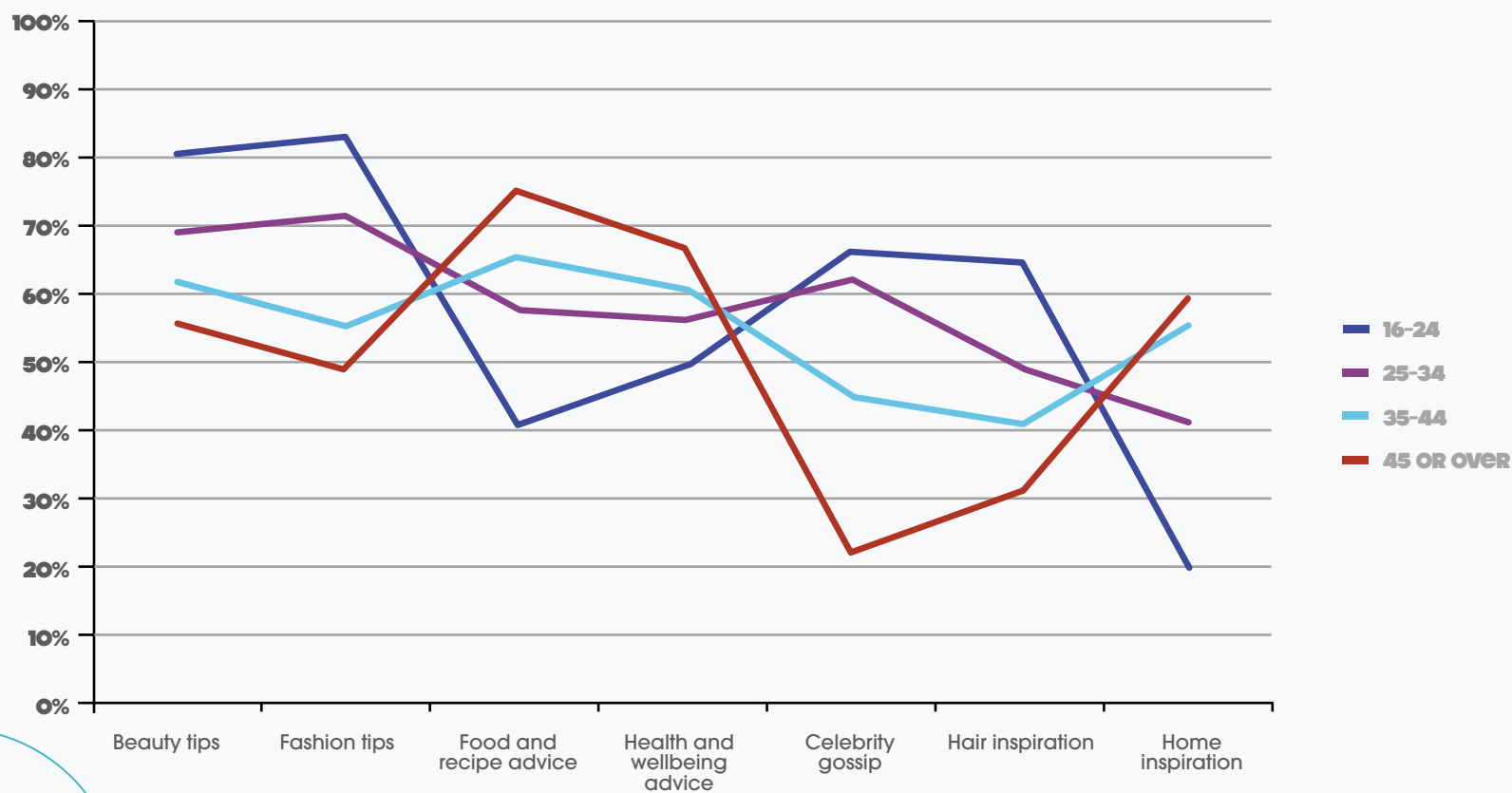
"THE NUMBER OF VISITORS TO WOMEN'S WEBSITES ROSE BY 35% BETWEEN DECEMBER 2006 AND DECEMBER 2007. AN ESTIMATED 55% OF SOCIAL NETWORKING WEBSITE USERS ARE WOMEN"

GUARDIAN 21/03/08

WHAT THEY ARE DOING ONLINE?



THE CONTENT THEY CONSUME



COMPANIES ARE PREPARING FOR WEB 2.0 WOMEN

"THE WEBSITE ASK HAS SURRENDERED IN ITS EFFORT TO COMPETE WITH GOOGLE AND YAHOO FOR INTERNET SEARCHES, OPTING INSTEAD TO REINVENT ITSELF AS A FEMALE-FOCUSED ONLINE QUERY SPECIALIST"

GUARDIAN 6/03/08

"A RECENT STUDY FOUND THAT, IN TERMS OF AUDIENCE, THE FASTEST GROWING CATEGORIES ONLINE LAST YEAR WERE WOMEN'S COMMUNITIES AND POLITICAL SITES, WHICH EXPLAINS YAHOO'S PREPARATIONS TO LAUNCH A MAJOR NEW COMMUNITY SITE, AIMED AT WOMEN AGED 25-54"

GUARDIAN 21/03/08



YAHOO!



THE INTERNET IS PART OF WOMEN'S EVERYDAY LIVES

**BANKING, EMAIL, HOLIDAYS, FLIGHTS,
FACEBOOK, ONLINE LIBRARIES,
DATING, RESEARCH, PRICE
COMPARISON, SHOPPING, GARDENING,
RECIPES, CHILD INFORMATION, DAYS
OUT, GOOD DEALS ONLINE, BOOK
TICKETS, MAKE RESERVATIONS,
FOOD SHOPPING, CARD MAKING,
SCRAP BOOK, YOUTUBE, TEACHING,
COSMETICS, ESTATE AGENTS,
NHS DIRECT, HELPING KIDS WITH
HOMEWORK, BUYING CHILDRENS TOYS**

"BANKING IS A NIGHTMARE - I LOVE ONLINE BANKING"

JANE - 40

**"I USE IT FOR EMAILING FRIENDS, ABROAD AND JUST
ONES I DON'T GET CHANCE TO RING, SHOPPING (FOOD
AND OTHER GOODS), BOOKING FLIGHTS, THEATRE
TICKETS ETC, GENERAL INFORMATION"**

SUSAN - 37

**"WOMEN BEHAVE LIKE WOMEN — WHATEVER THEY
DO AND WHEREVER THEY ARE. THE INTERNET IS
JUST ANOTHER CHANNEL FOR WOMEN TO DO WHAT
THEY ENJOY: SHOPPING, TALKING, AND CARING"**

REINEKE REITSMA FORRESTER

WOMEN USE THE INTERNET FOR SPECIFIC REASONS BUT AREN'T AFRAID TO SURF

"THE INTERNET HAS BECOME INTEGRATED INTO MY FAMILIES LIFE; IT IS ESSENTIAL FOR MY WORK"

HANNAH - 35

"I WILL THINK OF SOMETHING THROUGHOUT THE DAY THAT I NEED TO DO OR FIND OUT AND THEN GO ON AND SPECIFICALLY DO THAT THING."

JO - 42

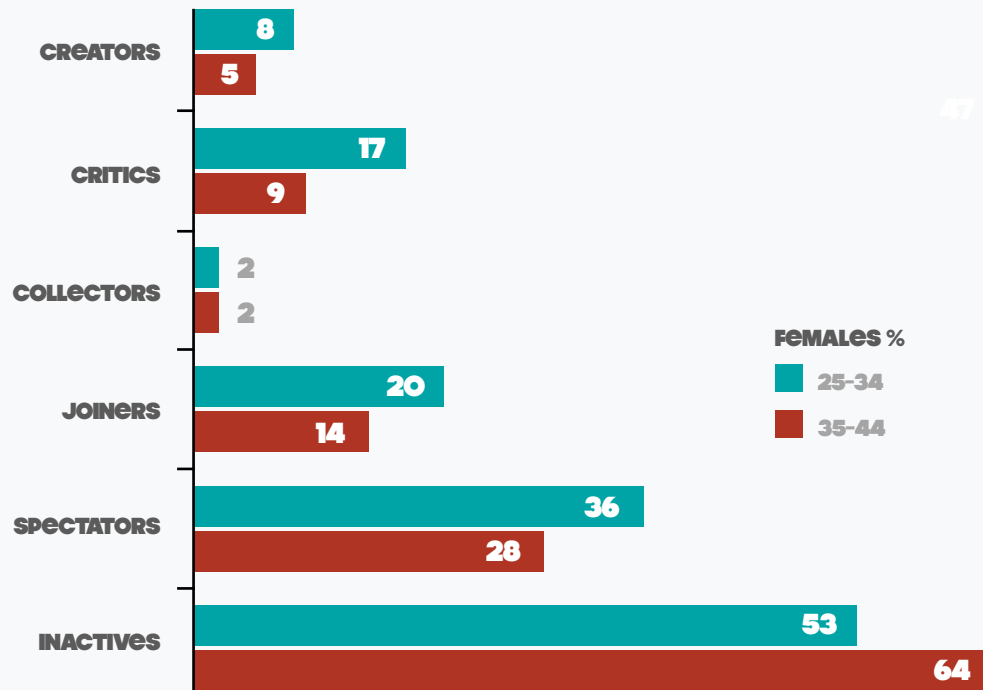
"CAN START OUT ON LINE FOR SPECIFIC TASK AND THEN WANDER OFF LOOKING RANDOMLY AT OTHER THINGS"

SARAH - 41

"ITS NICE TO GO ONTO SITES TO CHAT ABOUT STUFF OTHER THAN THE KIDS"

LAURA - 35

WOMEN ARE CONTRIBUTING TO THE INTERNET



GROUNDSWELL/FORRESTER

"IT WAS GOOD FOR FINDING OUT ABOUT A HOTEL WE STAYED IN THIS SUMMER AND THE FORUM WAS BANG ON"

JANE - 36

"I LOVE YOU TUBE - IT IS A FAMILY FAVOURITE"

TAMARA - 38

WOMEN ARE INFLUENCERS

BLOGHER, A MAJOR FEMALE BLOGGING NETWORK RECENTLY RECEIVED \$5M OF FUNDING TO BUILD AN ADVERTISING NETWORK AND THE BLOGHER CONFERENCE THIS YEAR HAD 1000 ATTENDEE BLOGGERS



"WELL FIRST OF ALL, MANY WOMEN ARE IN CONTROL OF THE FINANCIAL SPENDING IN THE HOUSEHOLD (AHEM, THAT'S TRUE AT MY HOUSE) AND THEY ARE ALSO 'CREATORS' WITH BLOGS, PICTURES, VIDEO AND PODCASTS - THEY'RE INFLUENCERS. WITH SO MANY BRANDS UNDERSTANDING THE NEW "GOOGLE" WORLD, WHERE INFLUENCE CAN HAPPEN FROM DIGITAL CREATORS, THEY DO WHAT THEY CAN TO REACH THEM"

JEREMIAH OWYANG
FORRESTER RESEARCH



WEB 2.0 WOMEN ARE USING FACEBOOK

10M PEOPLE ON FACEBOOK IN THE UK

UK - 64% FEMALE

US - 59% FEMALE

WORLDWIDE TOTAL - 64%

(TECHCRUNCH)

**IN JUNE, 11.5 MILLION OF THE INDIVIDUAL VISITORS
TO THE SITE WERE 35 OR OLDER**

**35-AND-UP CROWD NOW ACCOUNTS FOR MORE
THAN 41% OF ALL FACEBOOK VISITORS**

(BUSINESS WEEK 06/09/2007)

The Facebook logo, consisting of the word 'facebook' in a white, lowercase, sans-serif font on a dark blue rectangular background.

facebook®

FACEBOOK

"HAVING KIDS LIMITS YOUR TIME SO MUCH AND IT'S MUCH EASIER TO KEEP ON TOP OF EACH OTHERS LIVES. PLUS, I FIND THAT WE TEND TO MEET UP ALOT MORE AS ORGANISE IN ADVANCE AND I LOVE SEEING PICTURES OF WHAT THEY'RE UP TO AND ESPECIALLY OF MY FRIENDS WHO HAVE MOVED ABROAD"

ALISON - 35

"IT'S OK, GREAT FOR ORGANISING STUFF WITH FRIENDS IF YOU'RE IN A HURRY AND GREAT FOR BEING NOSEY AND LOOKING AT OTHERS PHOTOS/LIVES ETC"

GABY - 36

"IT IS THE BEST WAY OF KEEPING IN TOUCH WHEN YOU HAVE KIDS"

JO - 38



SUMMARY

We found strong evidence for the increasing feminisation of the internet.

Crucially, fuelled women are not just getting online for household management but for pure pleasure and indulging passions.

Online is both a space to share things with older kids and a space to escape looking after kids; there is relatively little interest in 'mum' focused sites.

Just under half of all women 25-45 are contributing to the internet in some way – either commenting or creating.

Facebook is a key social network and is skewed towards women overall, and has seen huge growth in terms of over 35s; it is also a fantastic way of managing social life and staying in touch when time is limited.

Philip Mcnaughton

Research Director, Face

