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The Single Female Tech Buyer

by Nathan Safran

for Consumer Product Strategy Professionals



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Cast Aside Myths And Embrace This Target Segment

by **Nathan Safran**

with J. P. Gownder, Abe K. Garon, and Dan Wilkos

EXECUTIVE SUMMARY

When it comes to women and technology, the media has traditionally focused on how married women use technology to help manage their busy lives. We analyzed the often-ignored segment of North American single women to determine how they think about and adopt consumer electronics (CE). We found single women are enthusiastic about technology. They barely trail single males in CE device ownership and have high expectations of their CE products. Single women hope these purchases will be both reliable and easy to install and use. Consumer product strategists should cultivate a dialogue with single women to understand their CE preferences while working to establish themselves as a brand that “gets” women’s tech needs.

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NOTES & RESOURCES

Forrester surveyed 5,187 North American households while researching this report to benchmark females’ attitudes, preferences, and device adoption. We also conducted interviews with technology vendors.

Related Research Documents

[“802.11n: Laying The Groundwork For The Digital Home”](#)

March 4, 2009

[“CE Purchase Plans: Converting On-The-Fencers To Buyers In An Economic Downturn”](#)

February 18, 2009

THE SINGLE FEMALE TECH OWNER: IGNORED BUT VALUABLE

A Web news search for “women+gadget” returns numerous articles from mainstream media sources such as *The New York Times*, CBS, and the BBC that examine women and their use of technology. Many of the articles focus on married, working mothers and examine things like how they use technology to help manage their lives and how family influences drive their CE decision-making. While useful, these articles ignore the 22% of the population that is single and female.¹ An analysis of Forrester data confirms that married women adopt technology at rates that are higher than for single females. Their tech buying is influenced by the presence of a male and children in the home and by significantly higher incomes — on average, their household income is 38% higher than that of single females.² How do single women, who are not influenced by the same familiar factors as married women, think about and adopt consumer electronics?

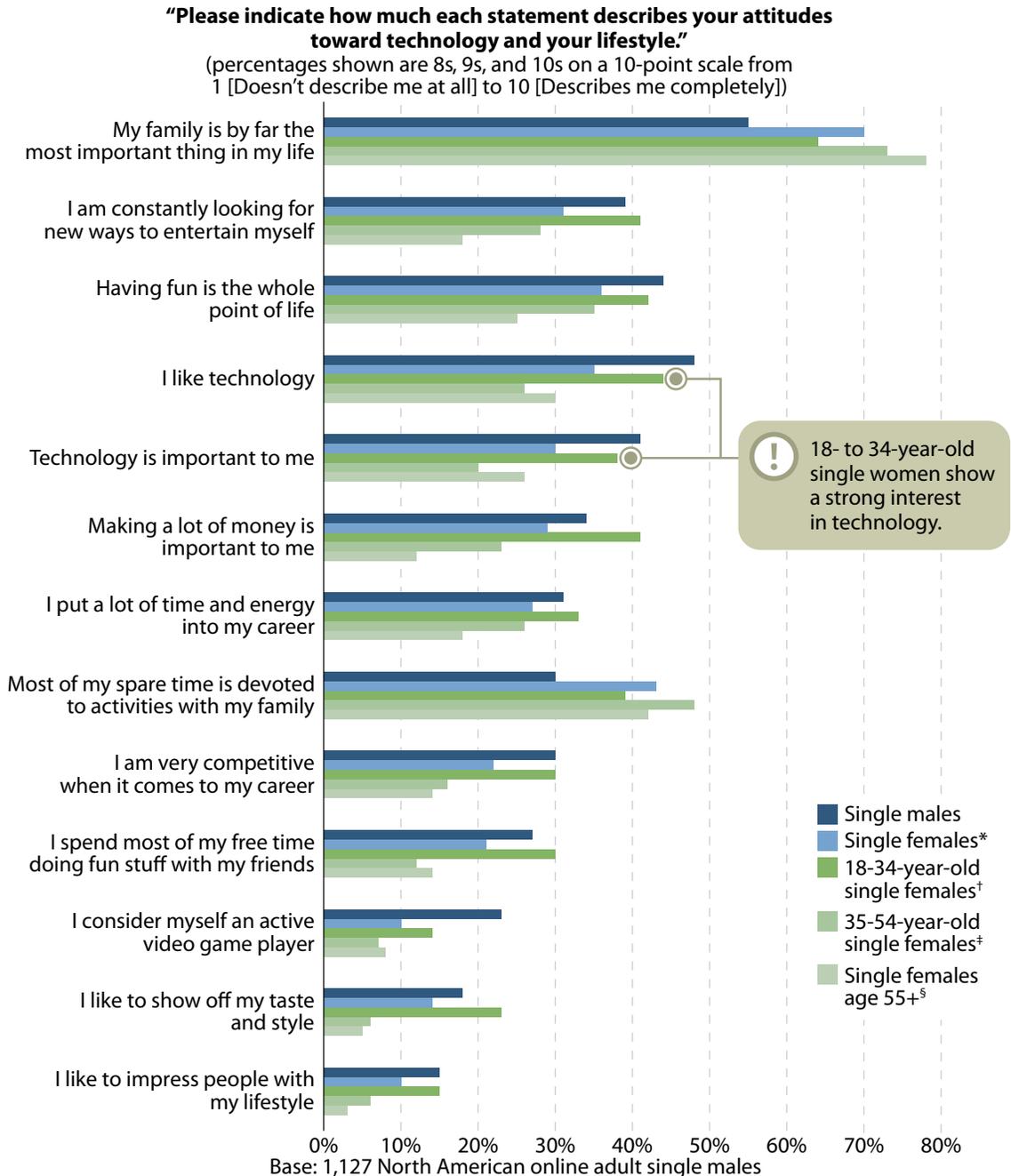
In analyzing the single female consumer, Forrester believes quantitative data helps avoid a common marketing mistake. Lisa Johnson and Andrea Learned, authors of *Don't Think Pink*, label the use of old and tired assumptions in marketing to women as “pink thinking.”³ They point to several characteristics that make up pink thinking, including operating on dated assumptions and stereotypes, resistance to new ideas, limited staff and budget, and visions of pastels, hearts, flowers, and butterflies. While many companies have evolved beyond this kind of thinking and recognize that women have unique needs and preferences, others remain stuck designing and marketing tech products to women with old and inaccurate assumptions — or simply don't cater to their needs at all. Understanding single women's lifestyle and tech attitudes will help consumer product strategists design and market CE devices that appeal to this underserved audience.

Lifestyle Attitudes Give Clues As To What Drives Single Females

In November 2008, we surveyed 5,187 North American online adults about their lifestyle and tech attitudes, device ownership, and purchasing process.⁴ In analyzing the responses of single women about their life motives, we saw that:

- **It's all about the family.** Despite their unmarried status, single women are far more focused on their families than they are on career or even friends. This holds true even for 18- to 34-year-olds and is true both attitudinally and in time spent on activities. Seventy percent of single females state their family is by far the most important thing in life, and 43% say most of their spare time is devoted to activities with their family (see Figure 1).
- **Technology attitudes have changed.** While older single women exhibit some degree of technology aversion, young single women respond much more positively to statements such as “I like technology” and “Technology is important to me.” This gap between older single women and younger single women suggests that CE device manufacturers will find it easier to gain access to all women in the future.

Figure 1 Attitudinal Statements Reveal What Matters To Female Tech Buyers



Base: 1,127 North American online adult single males

*Base: 1,046 North American online adult single females

†Base: 477 North American online single females between the ages of 18 and 34

‡Base: 315 North American online single females between the ages of 35 and 54

§Base: 254 North American online single females ages 55 or older

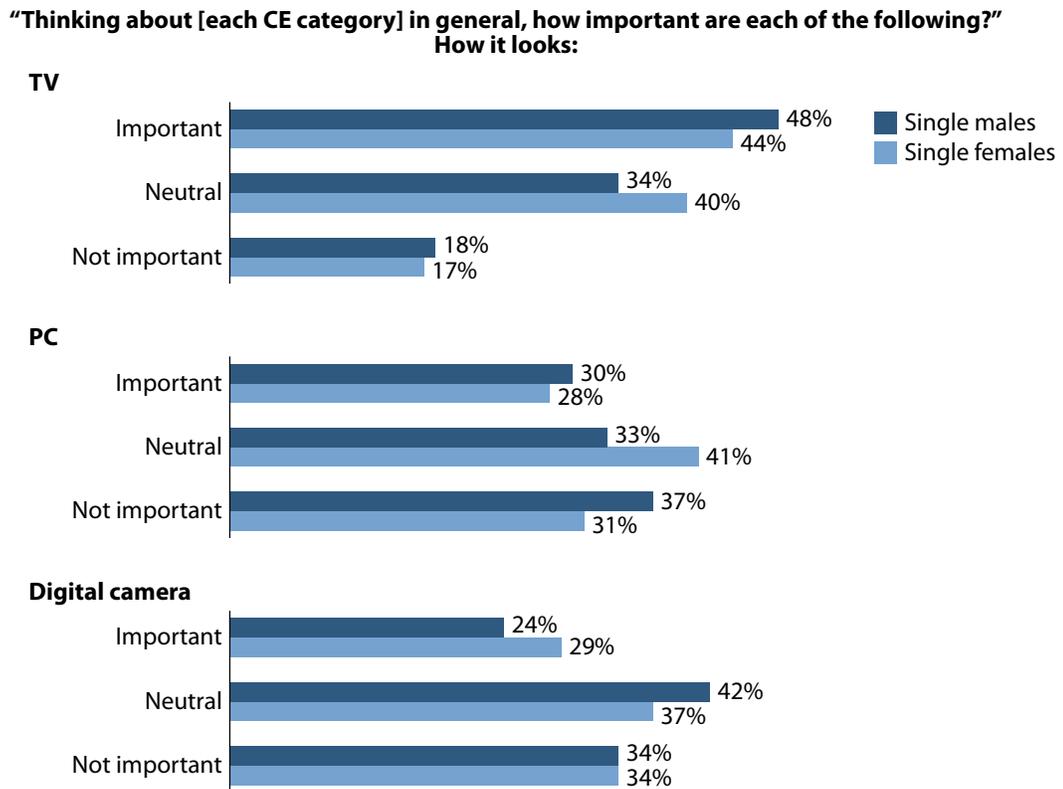
Source: North American Technographics® PC And Gaming Online Survey, Q4 2008

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Source: Forrester Research, Inc.

- **They value style and visual design — just like men.** Men and women both care a great deal about the way CE devices look (see Figure 2). The concept of “style” may mean different things to women than it does to men. We might hypothesize that a love of technology might lead men to call a sleek and thin television “stylish,” while women might value style cues that fit into the home, such as Samsung’s Touch of Color feature (a colored bezel that wraps around the TV screen). Avoiding “pink thinking” requires detailed studies on a product-by-product basis, however.

Figure 2 Women And Men Both Value Style In CE Devices



Base: 1,127 North American online adult single males and 1,046 North American online adult single females

Source: North American Technographics® PC And Gaming Online Survey, Q4 2008

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Source: Forrester Research, Inc.

Technology Fits Into Single Women's Lives

Technology-related attitudinal statements help us understand the comfort level young women feel with technology and help us determine whether they enjoy it or merely tolerate it as a means to an end. We found the following:

- **Technology improves their lives . . .** “Technology makes my life better” resonates most strongly out of all the attitudinal statements tested, with nearly 60% of single women agreeing (see Figure 3). This attitude holds true across the generations — only 5 percentage points separate 18- to 34-year-olds from single women ages 55 or older. For all women, the *ends* of technology are valuable, even among older women for whom the *means* of technology still elicit discomfort.
- **. . . and they have fun with it.** Half of single women find new technology to be fun or interesting. Young single women feel even more strongly, with 59% agreeing. Any “pink thinking” that de-emphasizes the connection between technology and fun isn't reflecting reality.
- **Many are ready to troubleshoot.** Forty-one percent of single females will usually be the one to set up a new gadget or piece of technology in the home, and 48% will attempt to fix computer problems themselves. Many say they comfortable doing so, with 42% reporting they are comfortable setting up new technology or software in the home. Let's be clear: These rates lag behind the rates for single men. But we can debunk any universal declarations about single women's need for help. We will see later that single women want their electronics to be easy to use, but a large percentage is already comfortable with troubleshooting and setup.

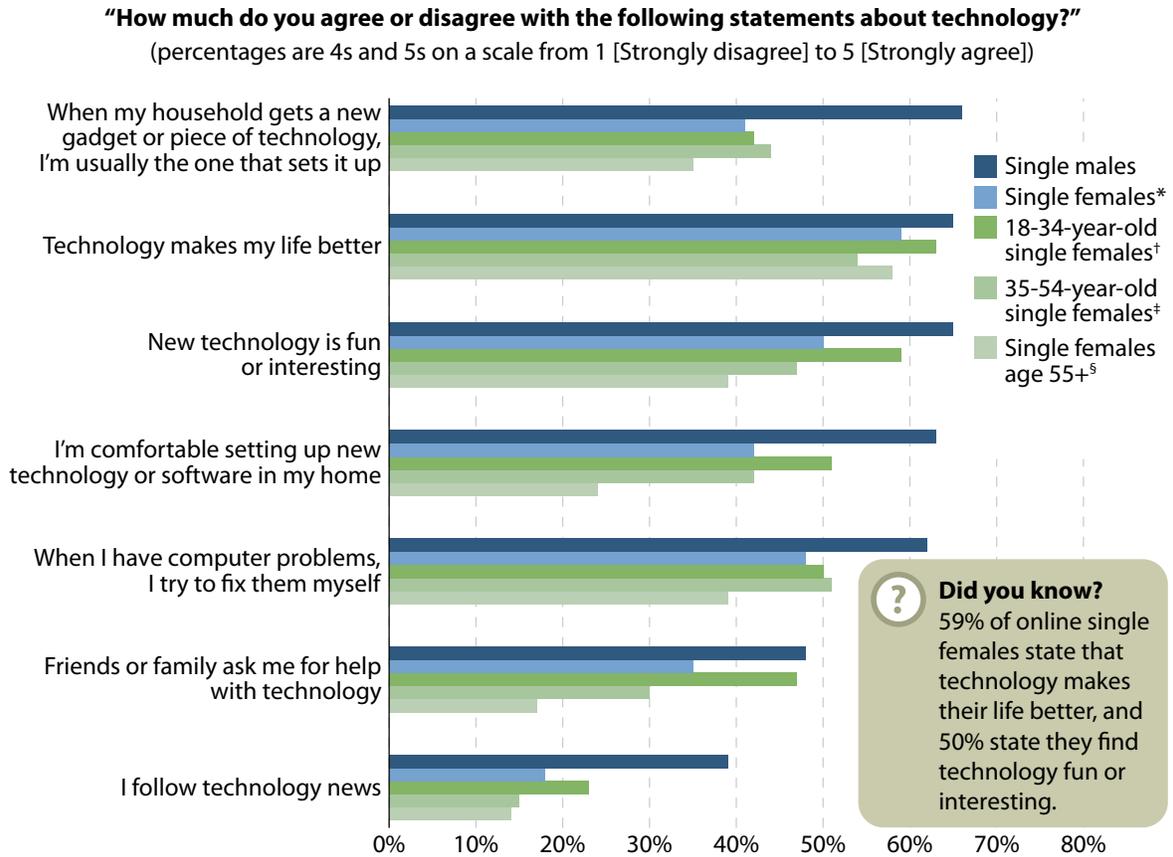
SINGLE WOMEN ARE EXPERIENCED AND DISCERNING WHEN IT COMES TO CE

Strong attitudinal statements of engagement with technology are significant in understanding the mindset of the single female tech buyer, but device adoption rates represent the degree to which they are prepared to act on their underlying interest. Today, single women:

- **Barely trail single males in CE device ownership.** While the perception may persist that women trail men in CE adoption, the reality is very different when comparing singles. Aside from HDTV and game consoles, device penetration is nearly identical (see Figure 4). For digital cameras, single women might even eclipse single men in ownership — although the difference isn't statistically meaningful. Still, single women live in just as rich and varied a device environment as single men.
- **Are serious about their gaming.** While women trail men in video game console ownership, the sheer number of owners might be surprising. With 44% of single women owning a console, gaming clearly appeals to single women. And nearly the same percentage of women own a handheld game player as single men, at 27% and 29%, respectively. The types of games women play might differ from men, and the “pick it up and play” gameplay of the Nintendo Wii has influenced console adoption. Nevertheless, single women are most definitely gamers.

- **Show more interest in laptops than single men.** While current laptop ownership is higher among single men, single women show greater interest in the laptop as their *next* PC purchase. Fully 47% of single females' next computer will be a laptop compared with 38% of single males.

Figure 3 Technology Improves The Lives Of Single Females, And They Find It Fun



Base: 1,127 North American online adult single males
 *Base: 1,046 North American online adult single females
 †Base: 477 North American online single females between the ages of 18 and 34
 ‡Base: 315 North American online single females between the ages of 35 and 54
 §Base: 254 North American online single females ages 55 or older

Source: North American Technographics® PC And Gaming Online Survey, Q4 2008

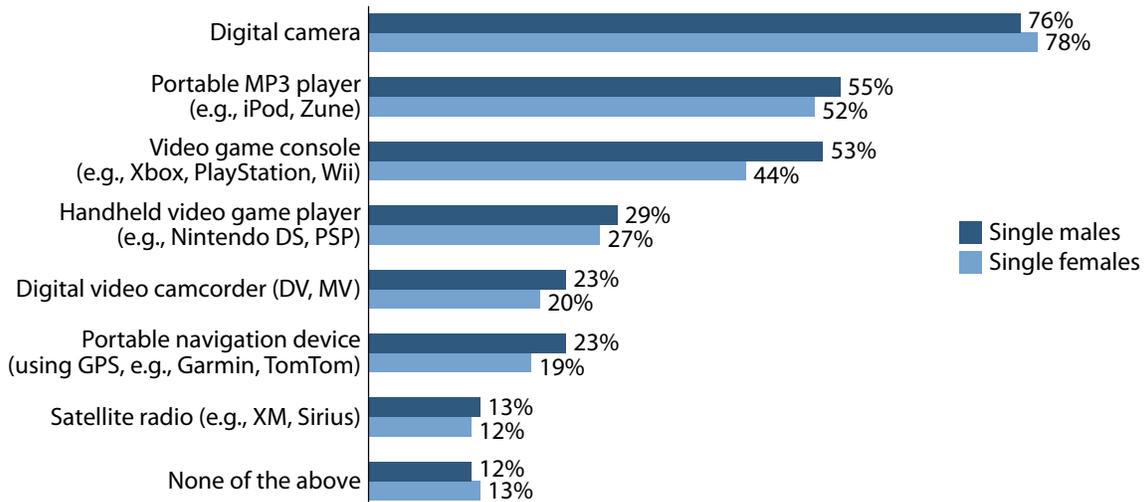
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Source: Forrester Research, Inc.

Figure 4 Single Female CE Adoption Rates Reveal Technophiles With Diverse Device Interests

4-1 Ownership rates are close for most devices

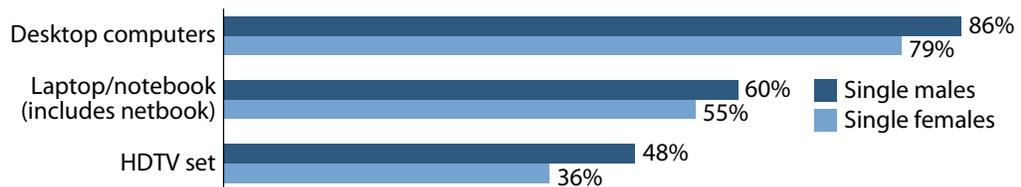
“Which of the following devices are currently owned by you or members of your household?”



Base: 1,127 North American online single adult males and 1,046 North American online adult single females

4-2 Single men are ahead in HDTV ownership

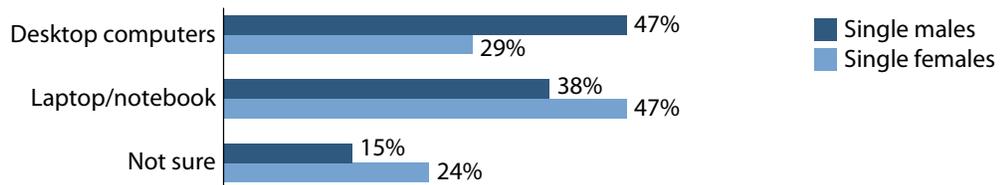
“Which of the following devices are currently owned by you or members of your household?”



Base: 1,127 North American online single adult males and 1,046 North American online adult single females

4-3 Single women show strongest interest in laptops

“Do you think your next computer will be a desktop or a laptop/notebook?”



Base: 299 North American online single adult males and 270 North American online adult single females

Source: North American Technographics® PC And Gaming Online Survey, Q4 2008

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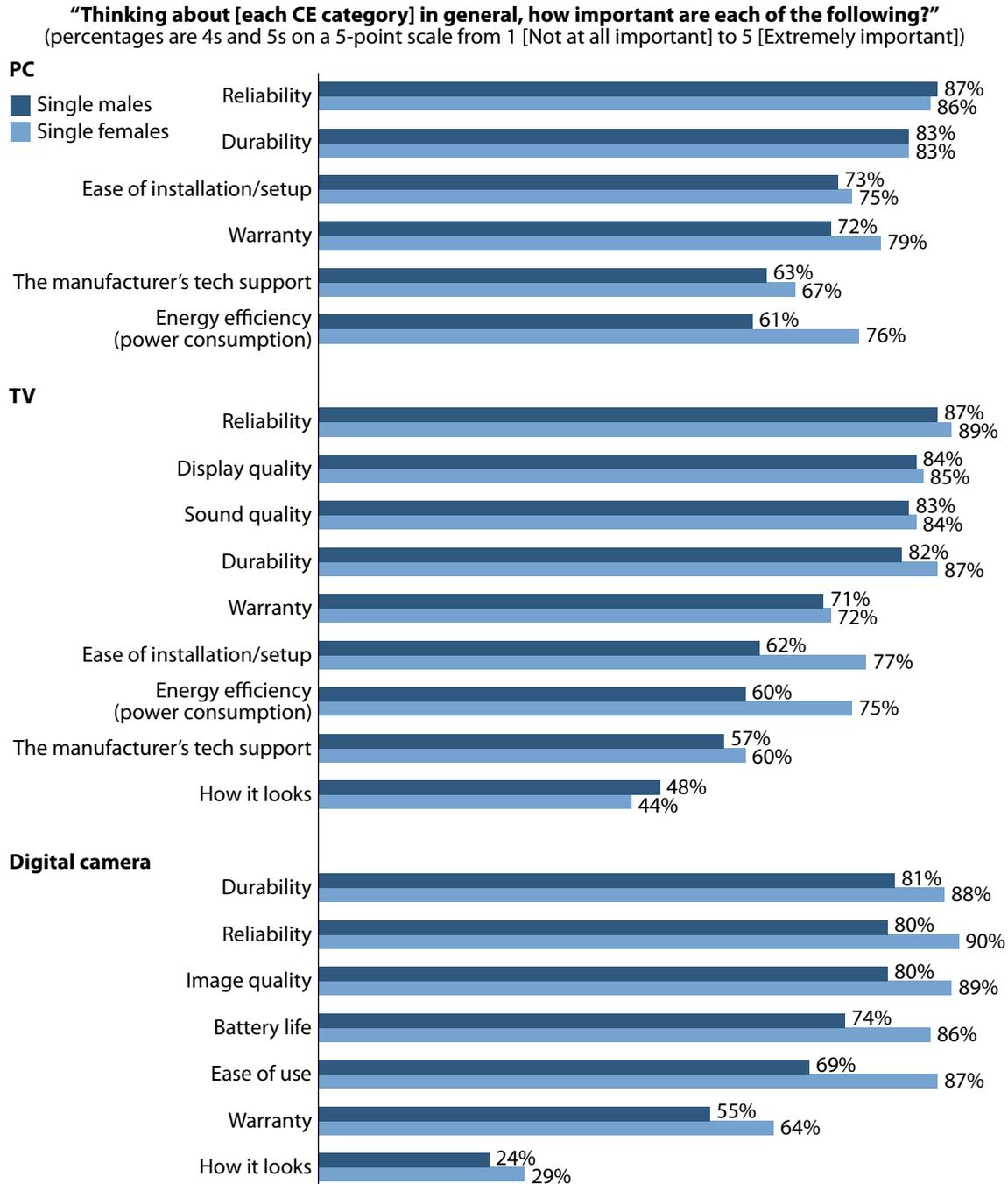
Source: Forrester Research, Inc.

Female Tech Buyers Expect A Lot From CE Devices

Single women stand out from single men strongly in one specific area: They have much higher expectations, in general, when purchasing CE devices. Single women stand out for their interest in:

- **Ensuring the reliability of devices.** Both single men and single women care about reliability and durability. Single women stand out for their interest in ensuring those qualities via warranties on devices like PCs and digital cameras. They also show marginally higher interest in tech support. Risk aversion and product protection typify single women's approach to these devices.
- **Finding devices easy to use and set up.** Single women show a stronger desire for ease of installation and use than single men — by 15 percentage points for TVs and 18 percentage points for digital cameras (see Figure 5).
- **Saving energy through efficient power consumption.** Energy consumption shows the largest gap of all — single women care about this issue more than single men by 15 percentage points for PCs and TVs and 12 percentage points for digital cameras. PC energy efficiency links closely to the single woman's greater interest in laptops. But environmental concerns may also influence perceptions.

Figure 5 Single Women Hold High Expectations For Device Performance



Base: 2,536 North American online adult males and 2,574 North American online adult females
(multiple responses accepted)

Source: North American Technographics® PC And Gaming Online Survey, Q4 2008

RECOMMENDATIONS

TARGET SINGLE WOMEN WITH CONSUMER ELECTRONICS

Cast aside many of the stereotypes resulting from “pink thinking”: Single women live in a rich, varied CE environment, and young single women are much greater fans of technology than their forebears. Consumer product strategists selling devices can embrace single women as an underserved yet valuable target, thereby differentiating their products and expanding their addressable markets. To accomplish this goal, they should:

- **Maintain a dialogue with single women.** Technology vendors increasingly engage in research with women to understand their technology preferences. They use these research efforts to seed product ideas, test features, and build behavioral profiles. It’s time to go a bit deeper on single women of all ages, learning about their needs more specifically. How many research efforts into women’s needs, for instance, focus on family life and children? Single women merit studies tailored to their own social context and family lives.
- **Tie their brand to single women’s tech needs.** Brands that can establish themselves as “getting” women’s needs can become the brand that comes to mind when the female tech buyer is in the market for CE devices. HP has looked to do so by partnering with fashion designer Vivienne Tam to produce a special edition notebook with female styling cues and by marketing its TouchSmart touchscreen computers for the kitchen.
- **Market — and innovate on — reliability, warranties, and power consumption.** Single women care a great deal about these issues, but so do single men. Vendors with unique value propositions in these areas, though, will find particular success among single women. It’s a horizontal play that offers “win-win” benefits to all consumers as well as an underserved segment.

SUPPLEMENTAL MATERIAL

Methodology

For its North American Technographics® PC And Gaming Online Survey, Q4 2008, Forrester conducted an online survey fielded in November 2008 of 5,187 US and Canadian individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N=5,187), there is 95% confidence that the results have a statistical precision of plus or minus 1.4% of what they would be if the entire population of North American online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, region, and technology attitude to demographically represent the adult North American online population. The survey sample size, when weighted, was 5,109. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that this was an online survey. Respondents who participate in online surveys have in general more experience with the Internet and feel more comfortable transacting online. The data is weighted to be representative for the total online population on the weighting targets

mentioned, but this sample bias may produce results that differ from Forrester's offline benchmark survey. The sample was drawn from members of MarketTools' online panel, and respondents were motivated by a sweepstakes drawing. The sample provided by MarketTools is not a random sample. While individuals have been randomly sampled from MarketTools' panel for this particular survey, they have previously chosen to take part in the MarketTools online panel.

ENDNOTES

- ¹ The single female population percentage was calculated by adding the segments of females ages 15 years or older who were never married, separated, widowed, or divorced and dividing the total by the total population. Source: U.S. Census Bureau (<http://www.census.gov>). Forrester defines "single females" as female respondents who were never married, or are separated, widowed or divorced.
- ² For more information on the demographics of single women online, see the December 18, 2007, "[Demographic Profile](#)" report.
- ³ Source: Lisa Johnson and Andrea Learned, *Don't Think Pink: What Really Makes Women Buy — And How To Increase Your Share Of This Crucial Market*, AMACOM, 2004 (http://www.amazon.com/Dont-Think-Learned-Andrea-Johnson/dp/B001EEVIE8/ref=sr_1_1?ie=UTF8&s=books&qid=1239191404&sr=8-1).
- ⁴ Source: North American Technographics® PC And Gaming Online Survey, Q4 2008.

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