EXPLORING DIGITAL: THE WOMEN IN OUR DATA

October 2024

We'll be covering

1

The wider context

A widening gender divide and its implications

2

Women as consumers

Holding all the cards or bearing the cost?

3

Taking care

The parenting gap & re-wiring gender codes for the benefit of all.

4

What can you do?

Finding the win- win for society and business.
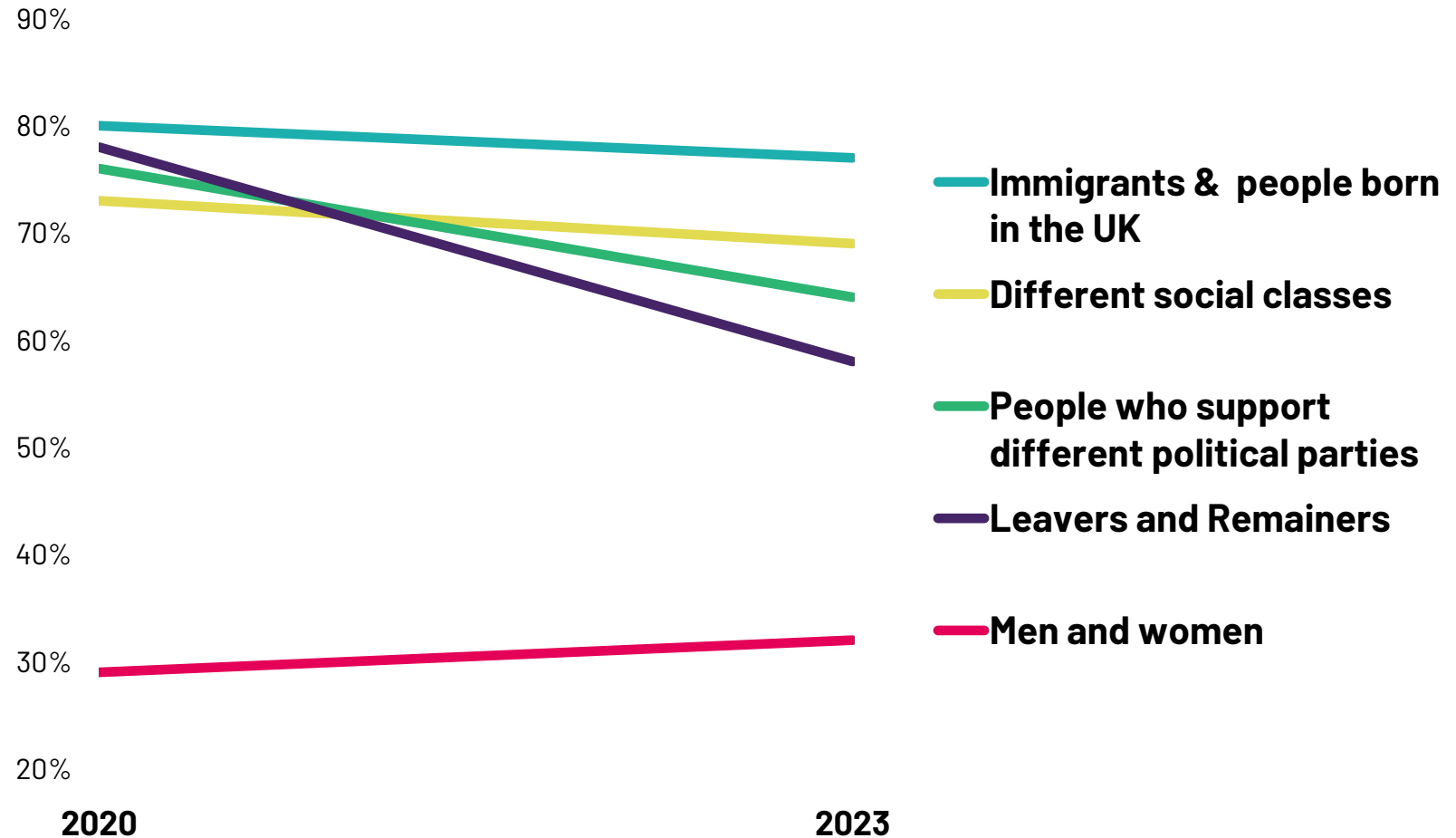
THE WIDER CONTEXT

A widening gender divide and its implications

Tensions remain high but easing. But gender is more divisive

"How much tension, if any, would you say there is between the following groups in the UK today?"
% Who say a great deal/fair amount

— **Immigrants & people born in the UK**

— **Different social classes**

— **People who support different political parties**

— **Leavers and Remainers**

— **Men and women**

2020   **2023**

2023 Base: 3,716 UK adults aged 16+, 17-23 Aug 2023.
2020 Base: 2,834 UK adults aged 16+, 25 Nov – 2 Dec 2020

+107%

Increase in the share British public who say they are scared to speak out and advocate for the equal rights of women because of what might happen to them 2017 (14%) vs. 2023 (29%).

29%

"The main role of a woman is to be a good wife and mother" % Agree in GB

Base: 48,541 adults surveyed across 50 markets between 23rd Sep – 14th Nov 2022. For full methodology see ipsosglobaltrends.com.
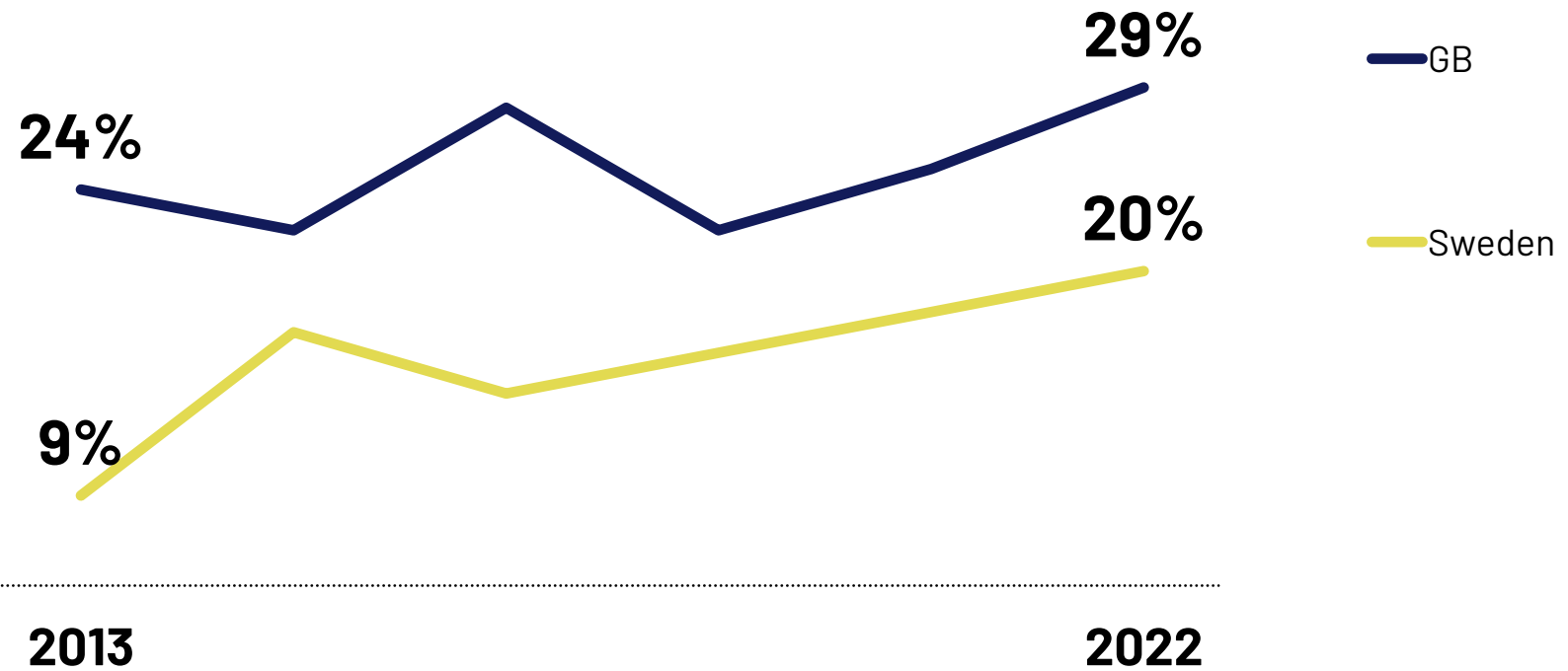
Source: Ipsos Global Trends 2023

The trend is on the increase in several countries

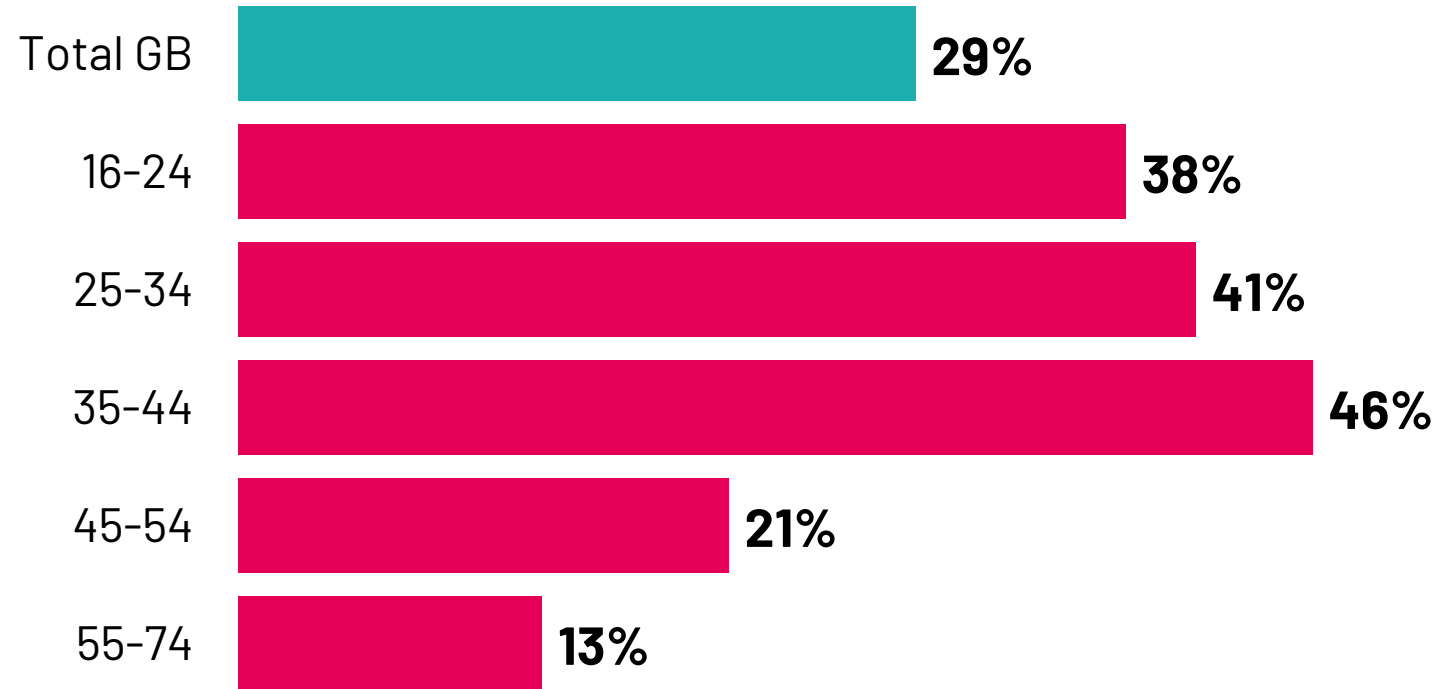"The main role of a woman is to be a good wife and mother"
% Agree

24%

29%

GB

20%

Sweden

9%

2013

2022

Ipsos

16-24's are more likely to hold this view than 45+

With a significant increase noted in the last 3-4 years

"The main role of a woman is to be a good wife and mother"

% Agree in GB

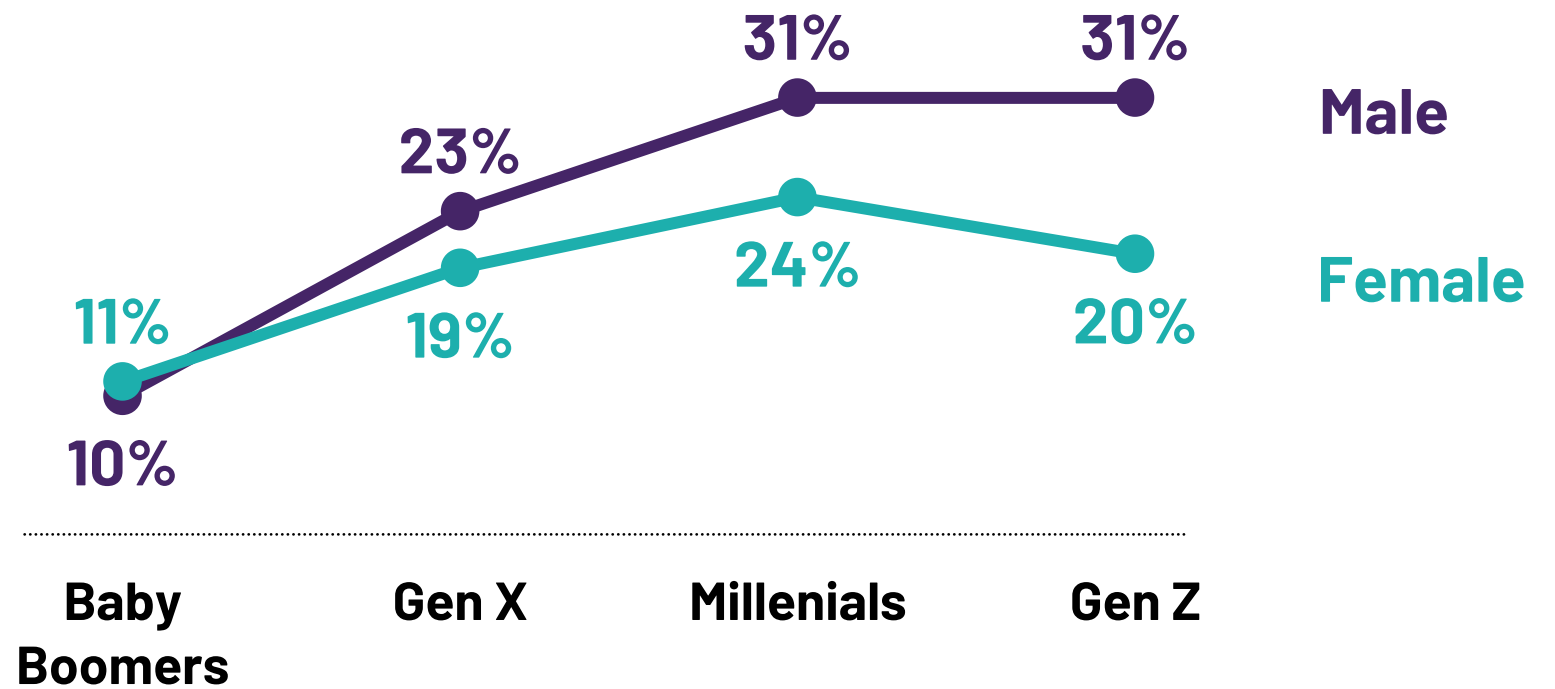| Group	%
Total GB	29%
16-24	38%
25-34	41%
35-44	46%
45-54	21%
55-74	13%

Ipsos

Gender straight-jackets are unhealthy for all

Gen Z & Millennial men hold trad views on men's roles

"A man who stays home to look after his children is less of a man" % Agree

Male

Female

	Baby Boomers	Gen X	Millenials	Gen Z
Male	10%	23%	31%	31%
Female	11%	19%	24%	20%

Base: 24,269 online adults aged 18-74 in Canada, Republic of Ireland, Malaysia, New Zealand, South Africa, Turkey and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries, 22 December 2023-5 January 2024

Source: Ipsos International Women's Day, March 2024

16-29's who see Andrew Tate favourably

Men   **Women**

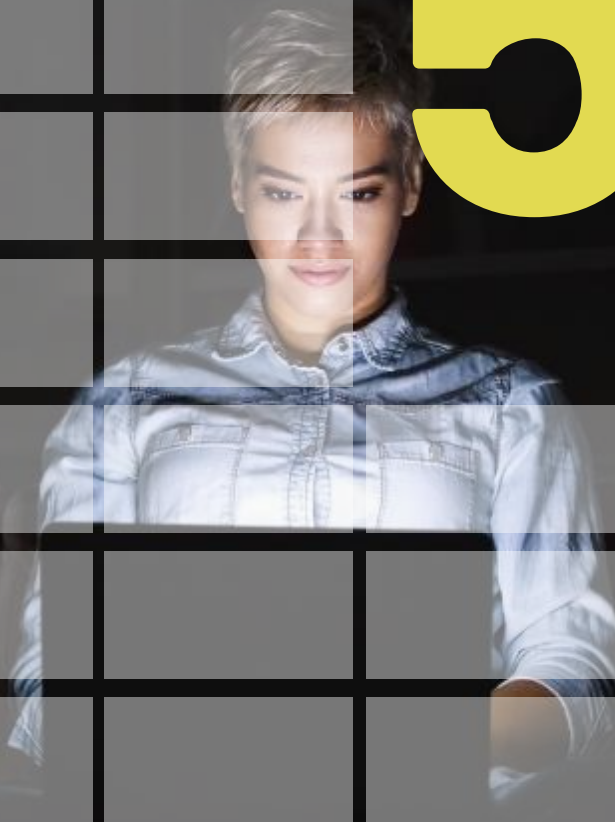**21%**   **7%**

Base: 3,716 UK adults aged 16+, 17–23 Aug 2023

WOMEN AS CONSUMERS

Holding all the cards or bearing the cost?

Women account for more time spent online

54%

Ipsos

That's an extra 34 minutes every day

+34 mins

Ipsos

Women account for more time spent on the majority of categories online

Share of time spent: % pt difference vs men

Category	% pt difference vs men
Homes & Property	+17%
Retail & Commerce	+13%
Games	+13%
Health	+12%
Events & Attractions	+7%
Travel	+5%
Online Media	+4%
Social Networking	+4%
Government & NGOS	+3%
Lifestyle	+2%
Education	+2%
Directories	+2%
Finance	+1%
Technology	+0%
Search Engines	-1%
Business Sectors	-2%
Entertainment	-3%
Career	-5%
Telecomms & ISP	-6%
Energy & Utilities	-7%
News	-8%
Gambling	-18%
Automotive	-21%
Sports	-35%

14 categories skew female

10 categories skew male
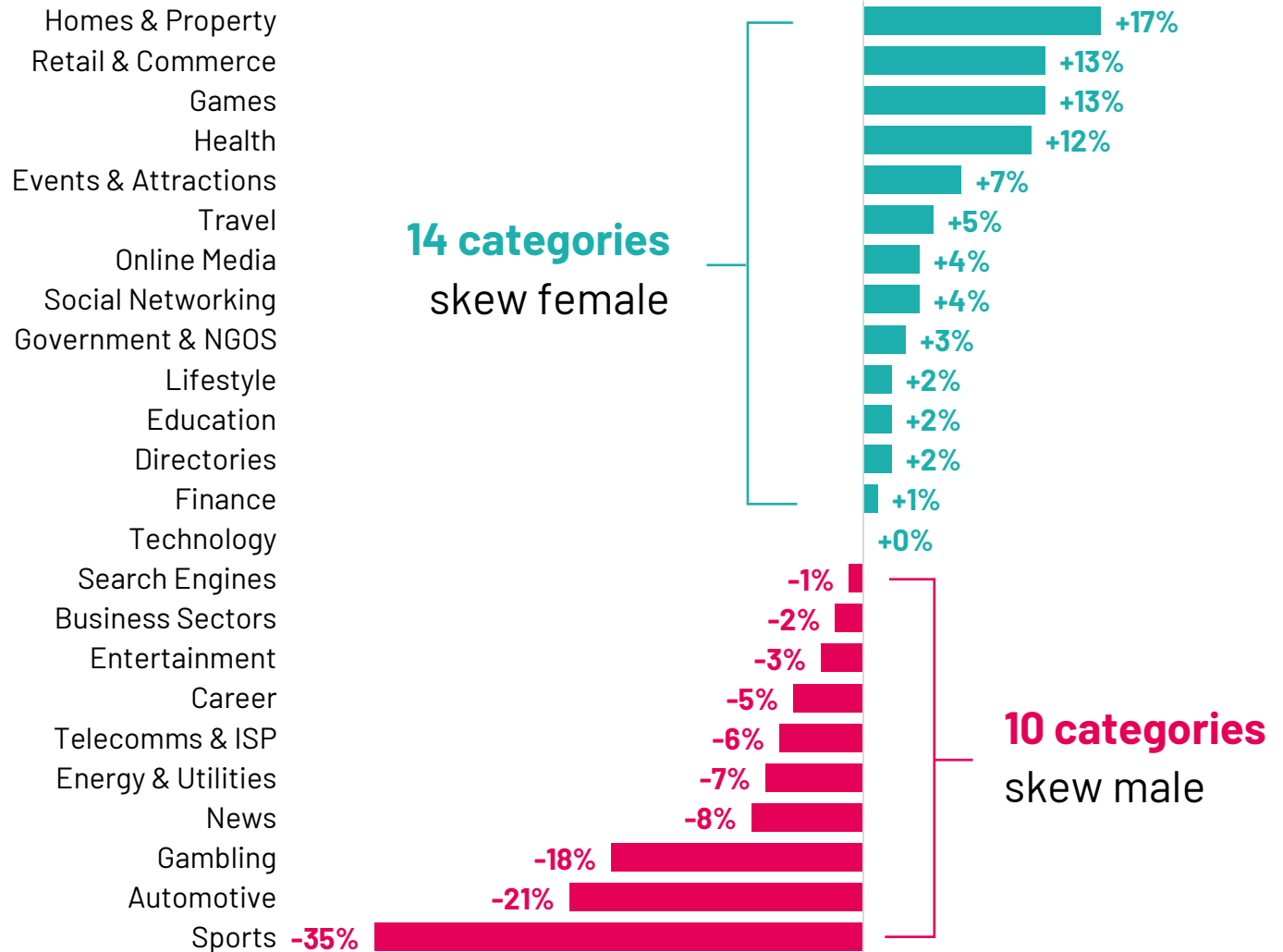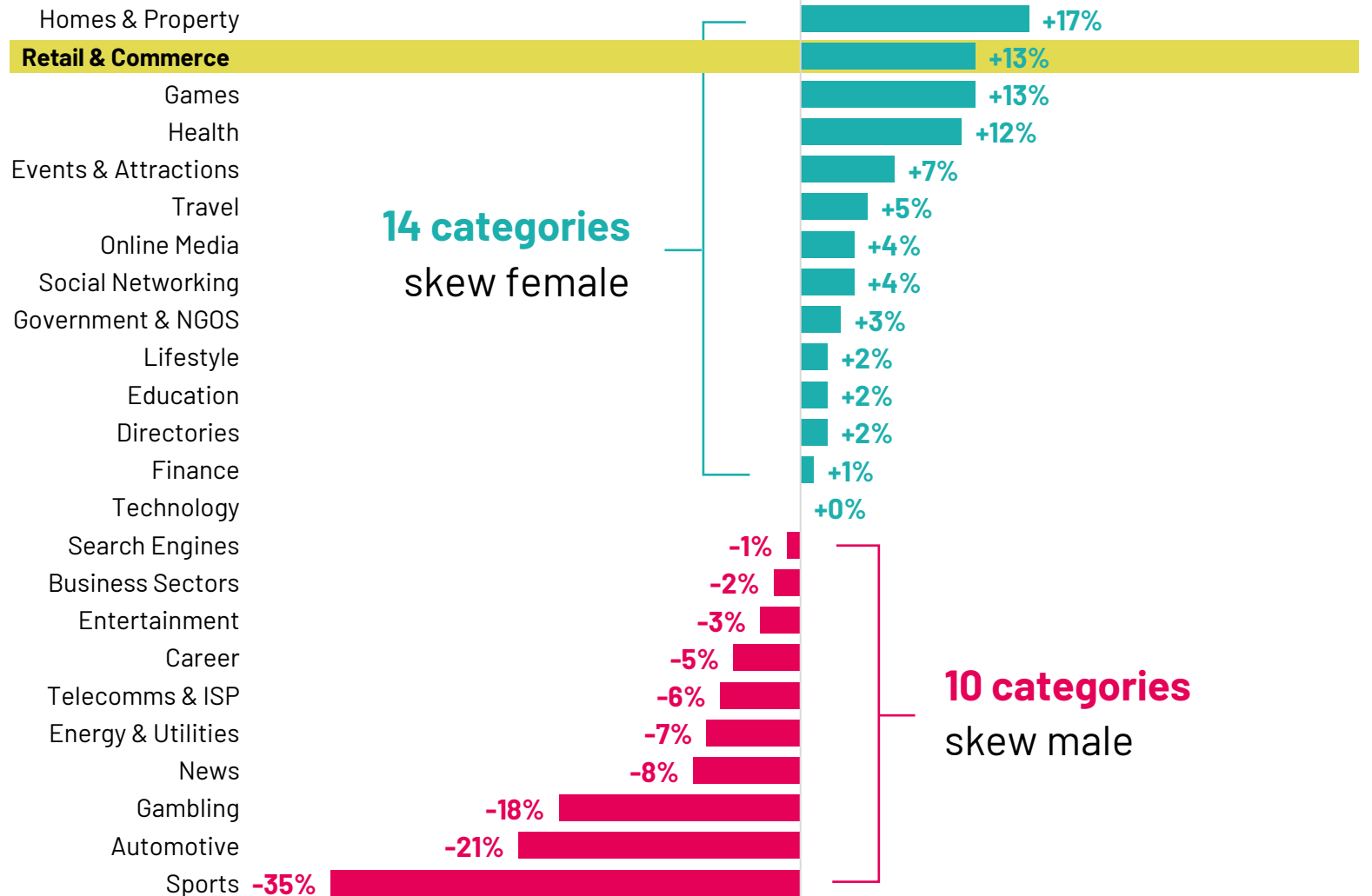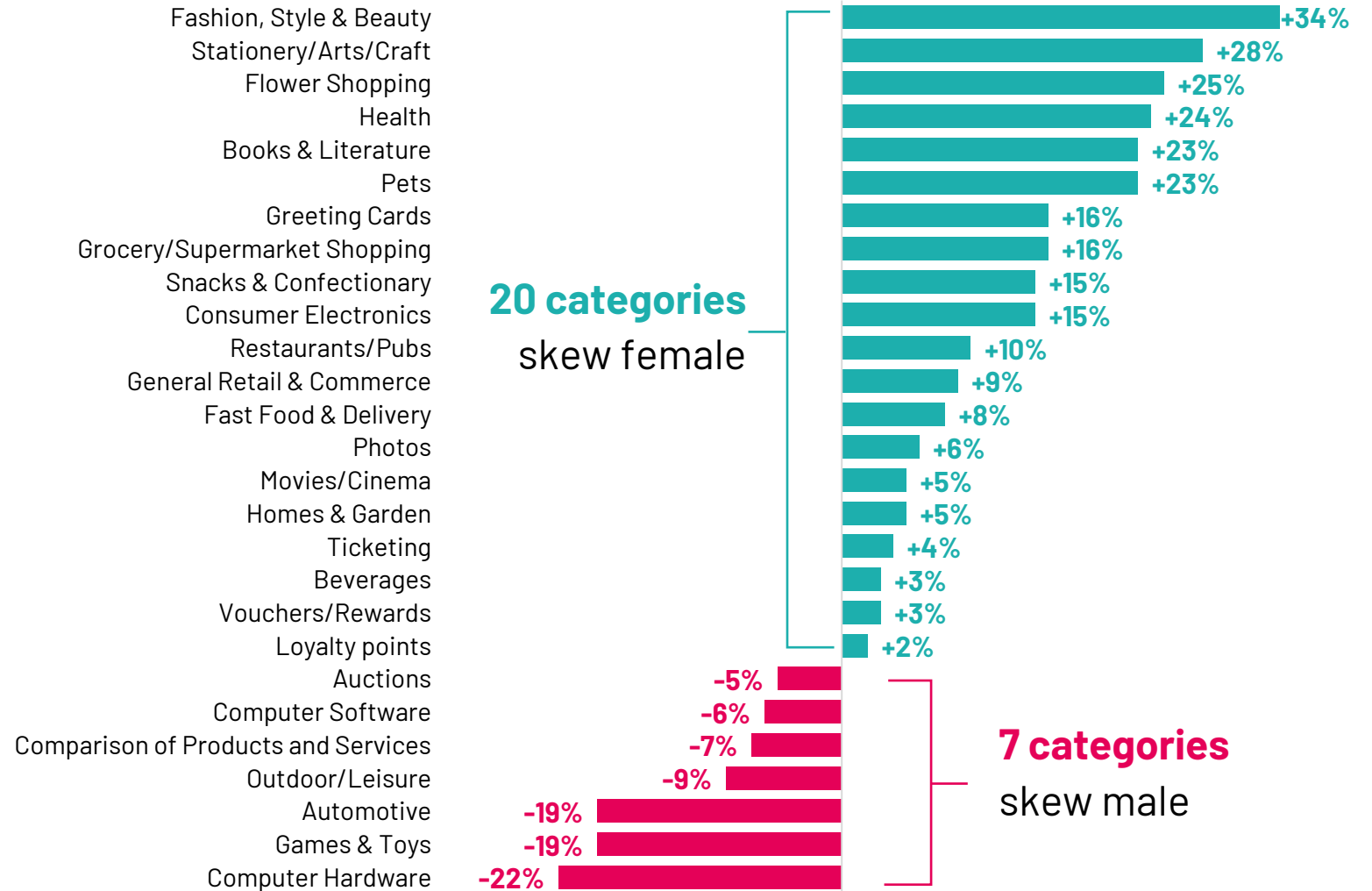
Ipsos

Women account for more time spent on the majority of categories online

Share of time spent: % pt difference vs men

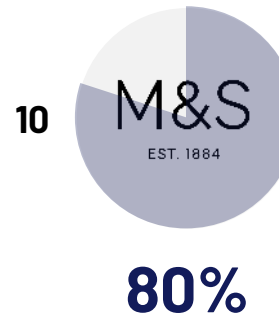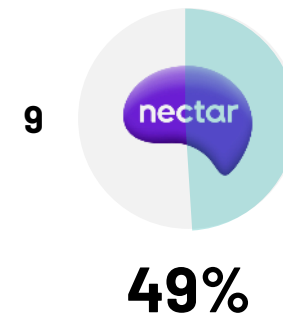| Category	Value
Homes & Property	+17%
Retail & Commerce	**+13%**
Games	+13%
Health	+12%
Events & Attractions	+7%
Travel	+5%
Online Media	+4%
Social Networking	+4%
Government & NGOS	+3%
Lifestyle	+2%
Education	+2%
Directories	+2%
Finance	+1%
Technology	+0%
Search Engines	–1%
Business Sectors	–2%
Entertainment	–3%
Career	–5%
Telecomms & ISP	–6%
Energy & Utilities	–7%
News	–8%
Gambling	–18%
Automotive	–21%
Sports	–35%

14 categories skew female

10 categories skew male

Ipsos

Women account for more time spent on 20 out of 27 retail categories …

Share of time spent: % pt difference vs men

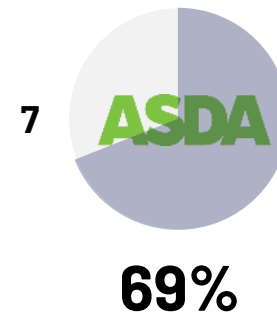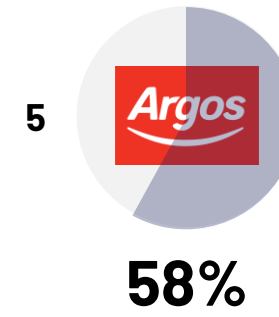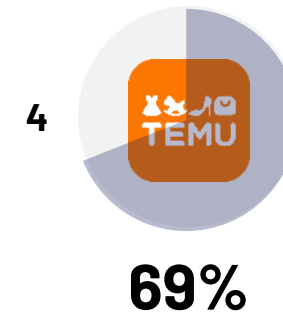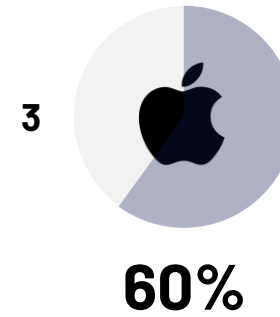| Category	% pt difference
Fashion, Style & Beauty	+34%
Stationery/Arts/Craft	+28%
Flower Shopping	+25%
Health	+24%
Books & Literature	+23%
Pets	+23%
Greeting Cards	+16%
Grocery/Supermarket Shopping	+16%
Snacks & Confectionary	+15%
Consumer Electronics	+15%
Restaurants/Pubs	+10%
General Retail & Commerce	+9%
Fast Food & Delivery	+8%
Photos	+6%
Movies/Cinema	+5%
Homes & Garden	+5%
Ticketing	+4%
Beverages	+3%
Vouchers/Rewards	+3%
Loyalty points	+2%
Auctions	-5%
Computer Software	-6%
Comparison of Products and Services	-7%
Outdoor/Leisure	-9%
Automotive	-19%
Games & Toys	-19%
Computer Hardware	-22%

20 categories skew female

7 categories skew male

Ipsos

And women spend more time on eight of the top 10 retailers

Share of time spent by women on the top 10 retail brands*
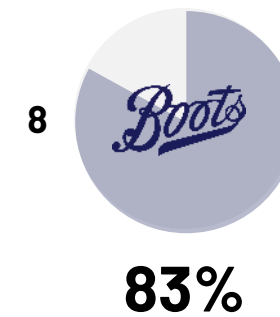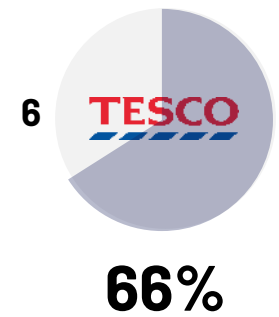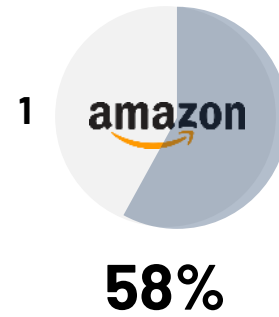
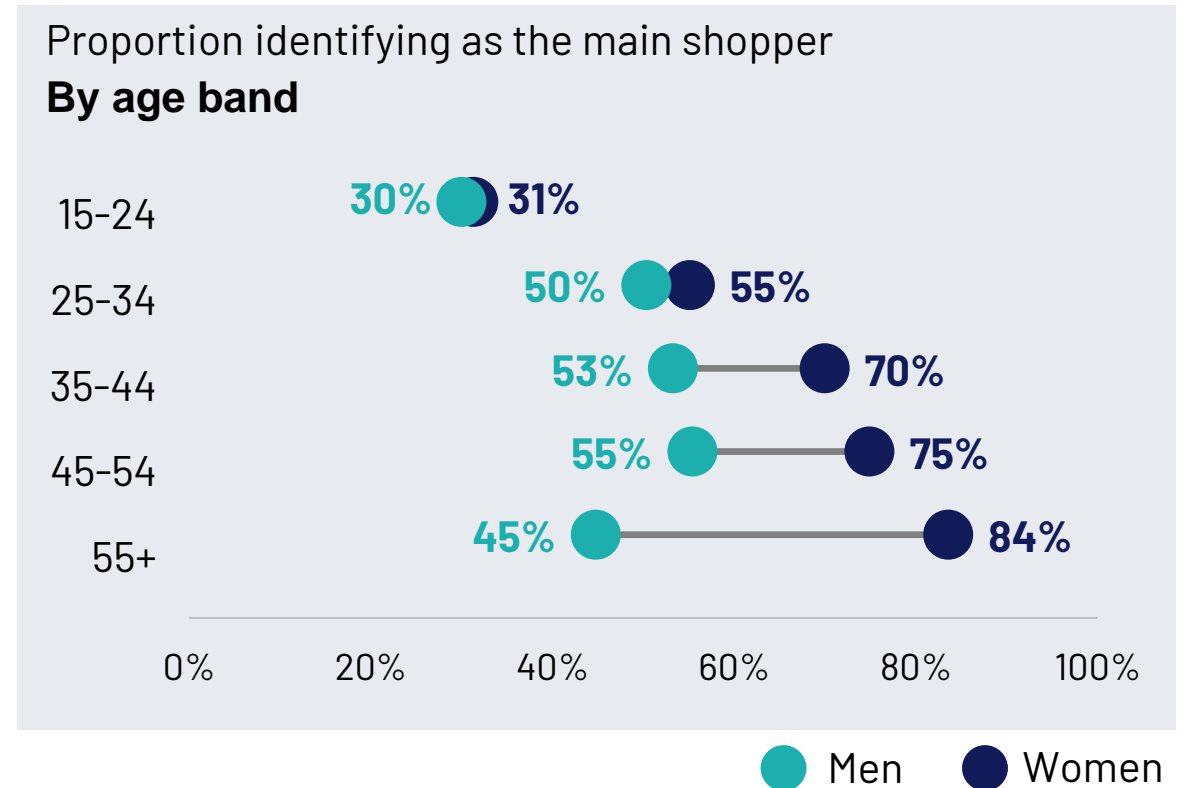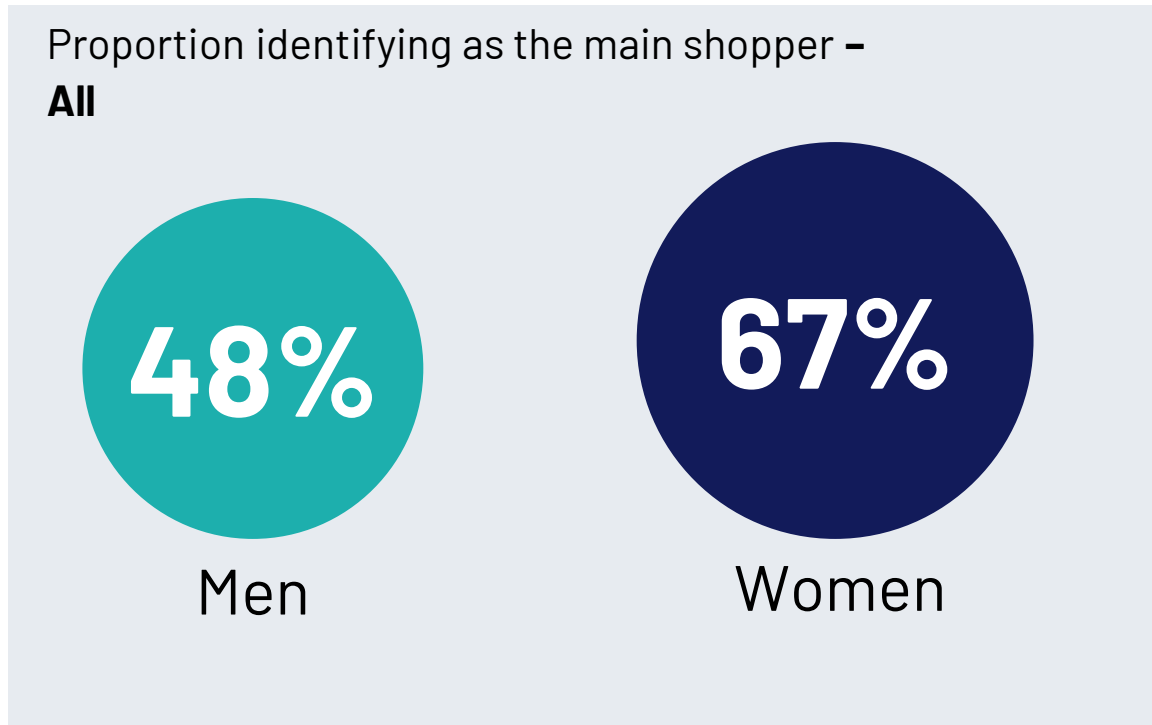| 1 amazon	2 ebay	3 Apple	4 TEMU	5 Argos
58%	**45%**	**60%**	**69%**	**58%**

6 TESCO	7 ASDA	8 Boots	9 nectar	10 M&S
66%	**69%**	**83%**	**49%**	**80%**

Women are more likely to be the main shopper – and the gap widens with age

Proportion identifying as the main shopper –
All

48%
Men

67%
Women

Proportion identifying as the main shopper
By age band

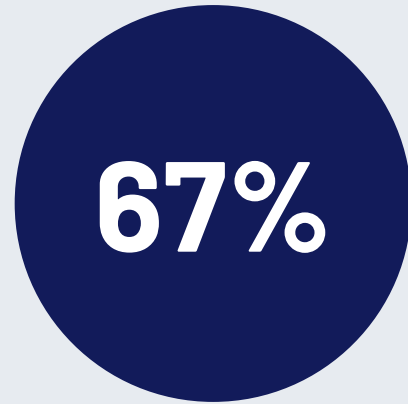| Age	Men	Women
15-24	30%	31%
25-34	50%	55%
35-44	53%	70%
45-54	55%	75%
55+	45%	84%

0%   20%   40%   60%   80%   100%

● Men   ● Women

Ipsos

Women are more likely to be the main shopper – and the gap widens with age

Proportion identifying as the main shopper* –
All

48%
Men

67%
Women

Proportion identifying as the main shopper*
Married / Living with a partner
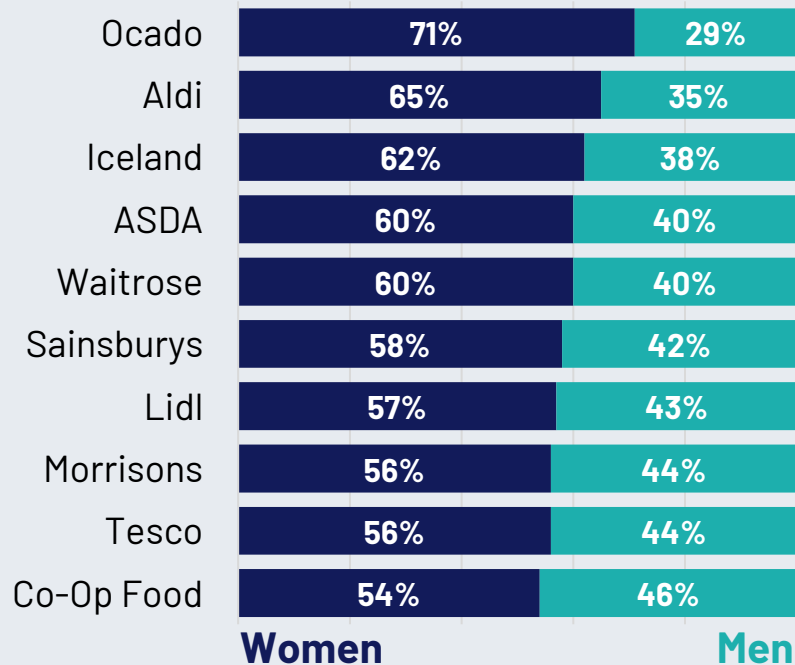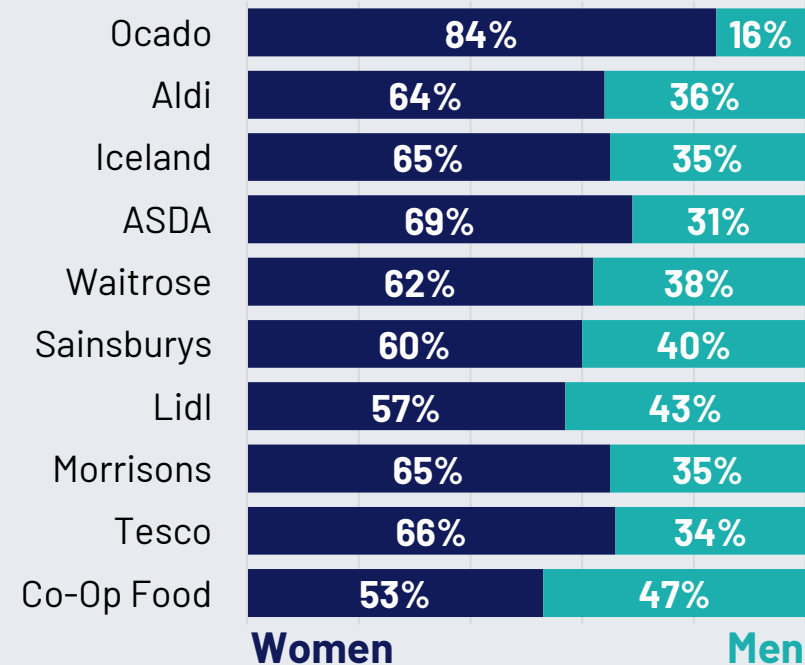
40%
Men

68%
Women

*Identifying as the main shopper of all or most items

Ipsos

Women make up the majority of users for all major supermarkets
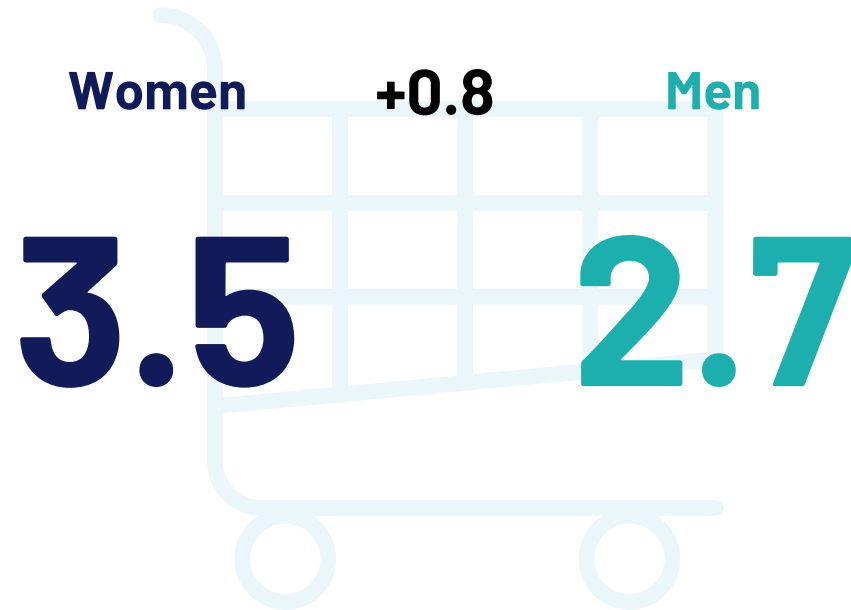
Audience for groceries

Supermarket	Women	Men
Ocado	71%	29%
Aldi	65%	35%
Iceland	62%	38%
ASDA	60%	40%
Waitrose	60%	40%
Sainsburys	58%	42%
Lidl	57%	43%
Morrisons	56%	44%
Tesco	56%	44%
Co-Op Food	54%	46%

Women — **Men**

Time spent for groceries

Supermarket	Women	Men
Ocado	84%	16%
Aldi	64%	36%
Iceland	65%	35%
ASDA	69%	31%
Waitrose	62%	38%
Sainsburys	60%	40%
Lidl	57%	43%
Morrisons	65%	35%
Tesco	66%	34%
Co-Op Food	53%	47%

Women — **Men**

Women access more grocery brands across more days each month

All aged 18+
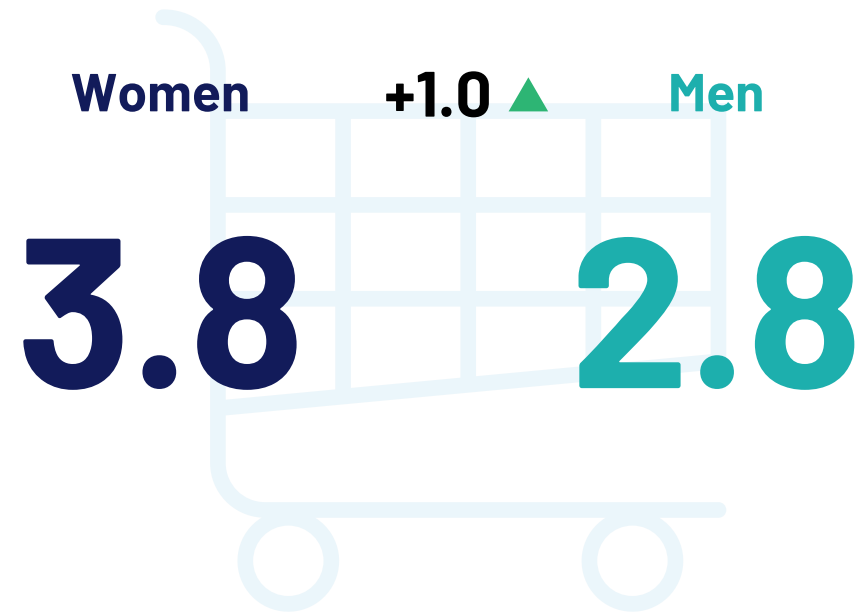
Women	+0.8	Men
3.5		**2.7**

Number of grocery brands per month

Women	+2.1	Men
9.2		**7.1**

Number of days accessed per month

Ipsos

Women access more grocery brands across more days each month

Women	+1.0 ▲	Men
3.8		**2.8**

Number of grocery brands per month

Women	+2.7 ▲	Men
10.0		**7.3**

Number of days accessed per month

Parents have said 'yes' they are a parent and that they have children 0-14 in the household.
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23

Source: Ipsos iris Online Audience Measurement Service, June 2024. All aged 18+ using PC/laptop, smartphone or tablet device(s). Pulled from passive data

Ipsos
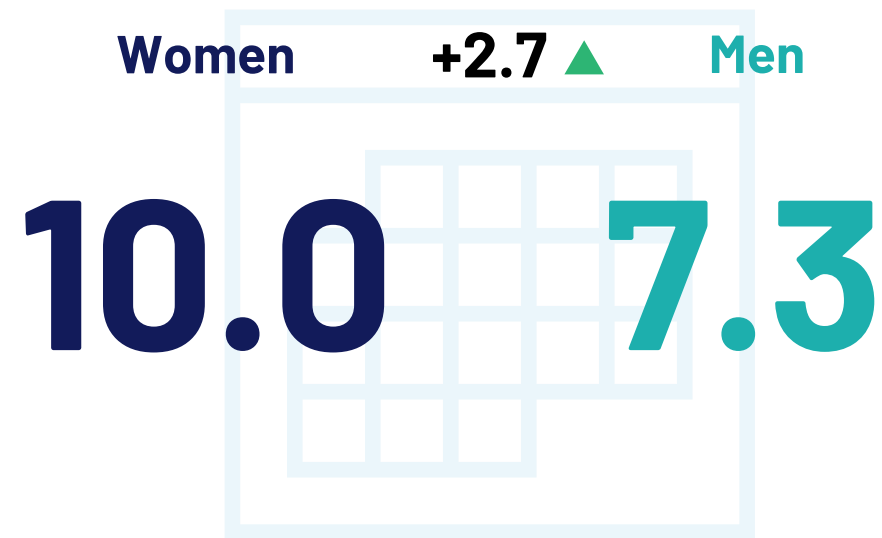
TAKING CARE

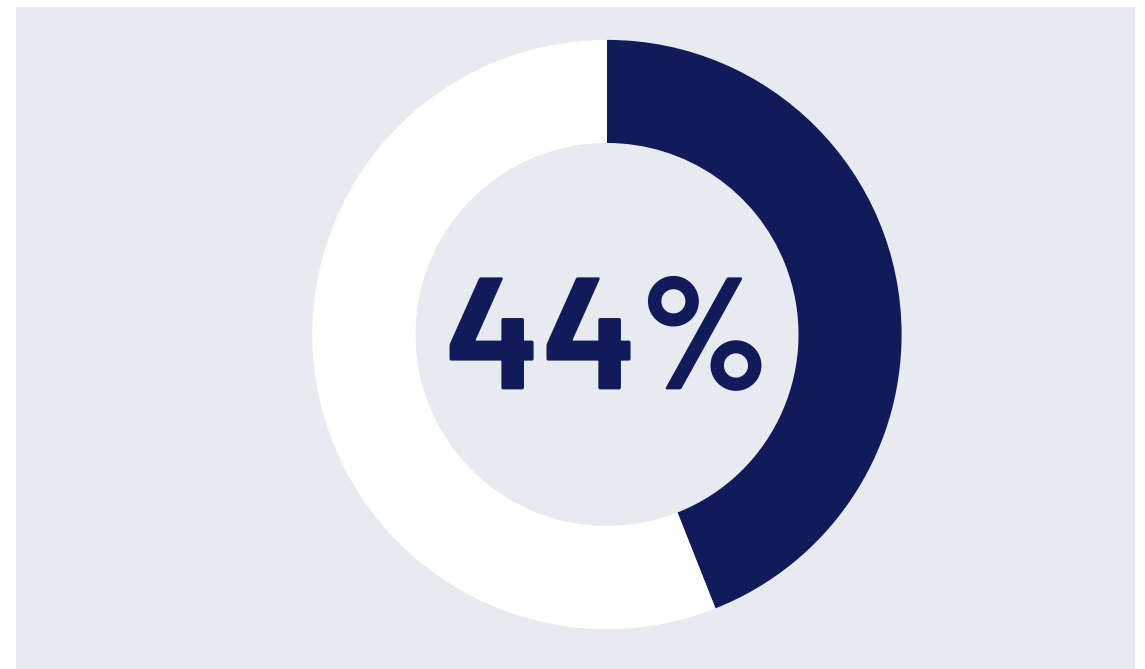**The parenting gap & re-wiring gender codes for the benefit of all.**

Women are spending less time on the careers category

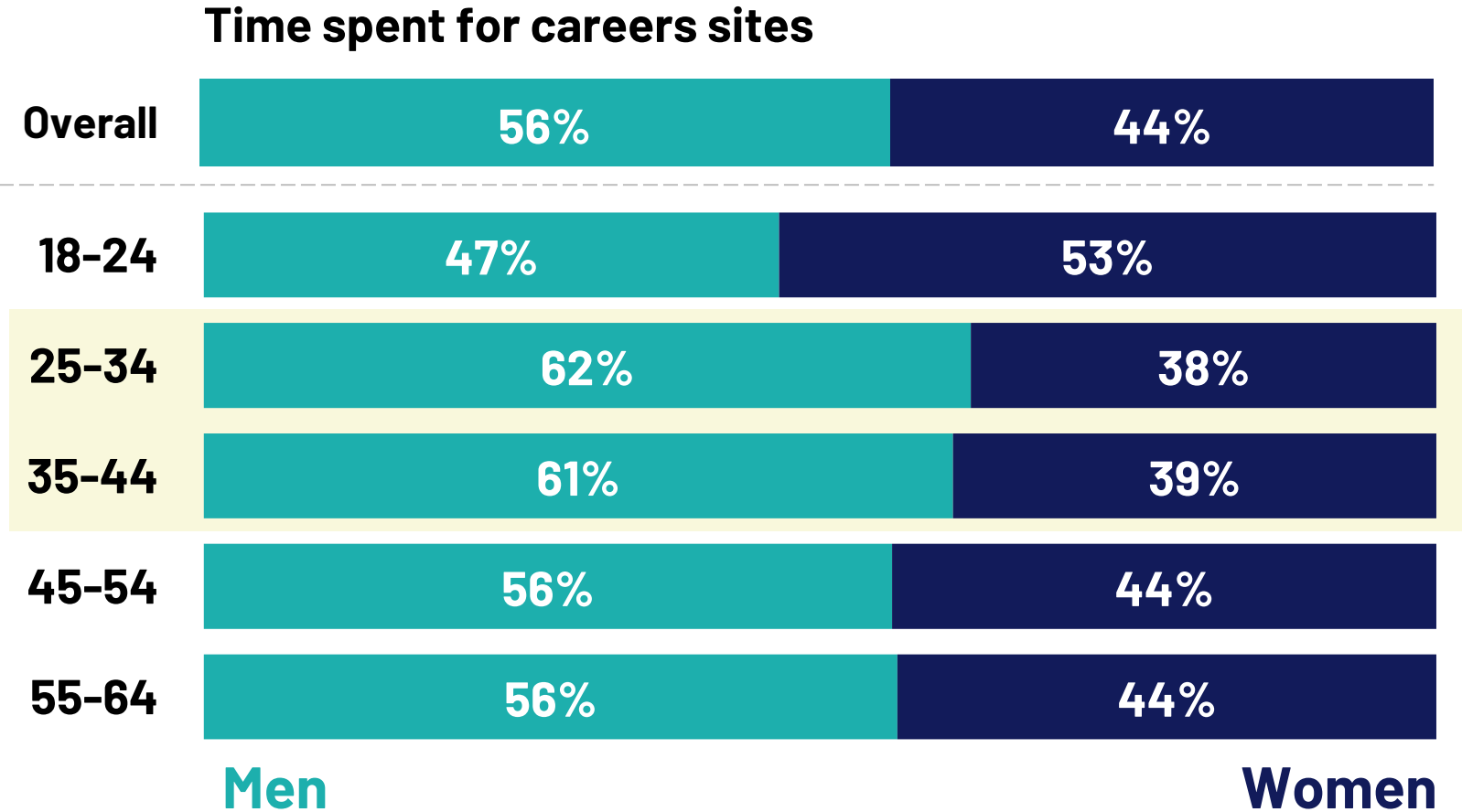### Audience for careers category - Women

50%

Time spent for careers category - Women
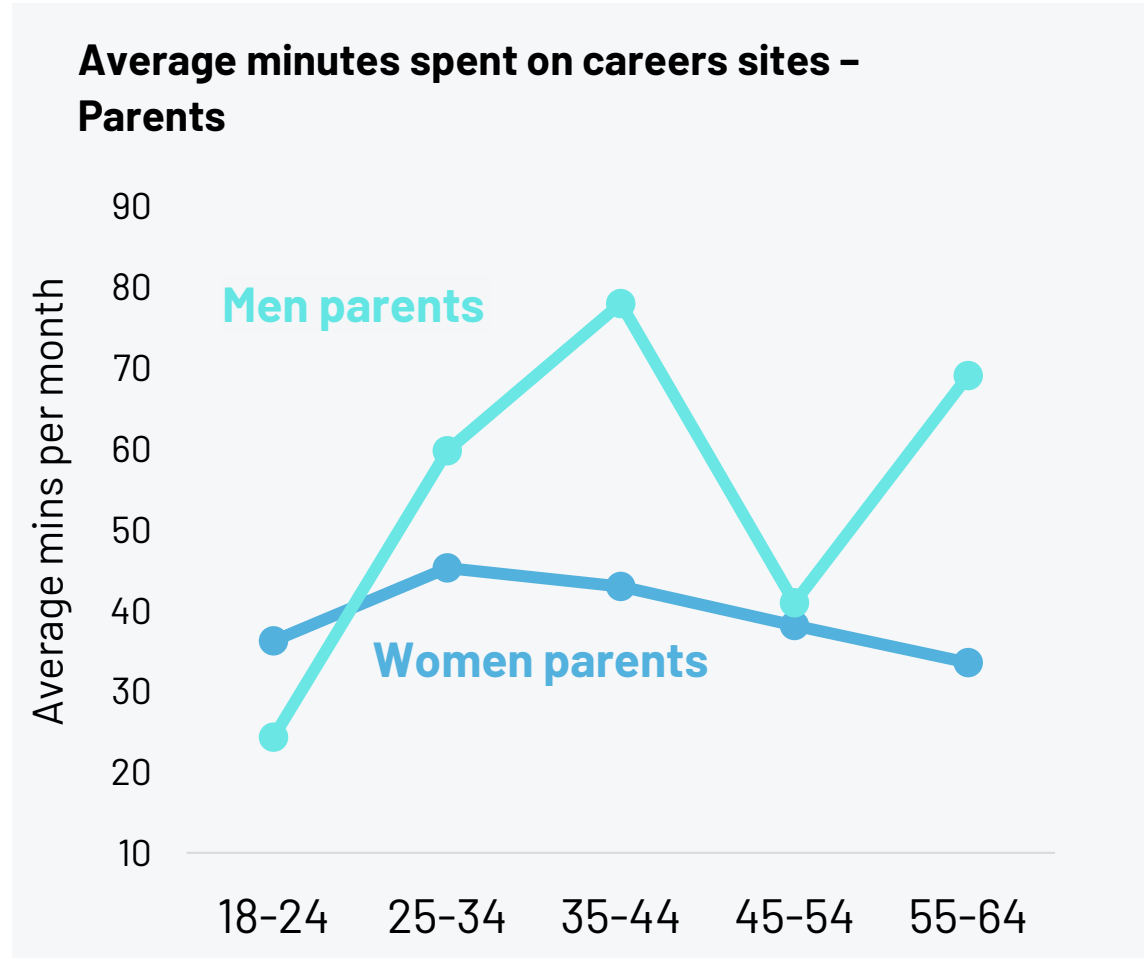

44%

The gap is widest during years when many will be starting families

Time spent for careers sites

Age	Men	Women
Overall	56%	44%
18-24	47%	53%
25-34	62%	38%
35-44	61%	39%
45-54	56%	44%
55-64	56%	44%

Men — **Women**

Ipsos

Parenting gap for women, not so much for much men

Average minutes spent on careers sites – **Men**

Average mins per month

80	
70	
60	
50	
40	
30	
20	
10	

18-24 25-34 35-44 45-54 55-64

All men

Men parents

Average minutes spent on careers sites – **Women**

Average mins per month

80	
70	
60	
50	
40	
30	
20	
10	

18-24 25-34 35-44 45-54 55-64

All women

Women parents

Parents have said 'yes' they are a parent and that they have children 0-14 in the household.

Ipsos

Parenting gap for women, not so much for much men

Average minutes spent on careers sites – Parents

Men parents

Women parents

Average mins per month

90
80
70
60
50
40
30
20
10

18-24   25-34   35-44   45-54   55-64

Ipsos

Parenting gap for women, not so much for much men

Average minutes spent on careers sites – Parents in full time employment

Chart: Average mins per month (y-axis, 10 to 90) by age group (x-axis: 18-24, 25-34, 35-44, 45-54, 55-64)

Men parents: 18-24 ≈ 25, 25-34 ≈ 61, 35-44 ≈ 80, 45-54 ≈ 42, 55-64 ≈ 75

Women parents: 18-24 ≈ 35, 25-34 ≈ 44, 35-44 ≈ 43, 45-54 ≈ 37, 55-64 ≈ 35

Parents have said 'yes' they are a parent and that they have children 0-14 in the household.
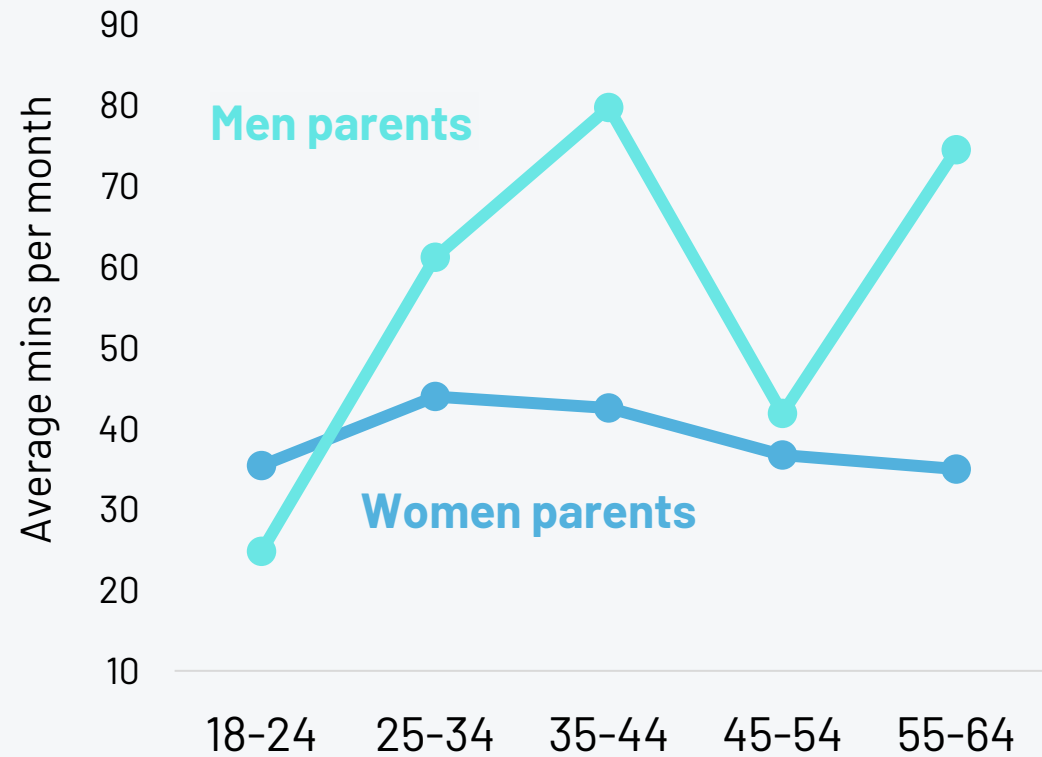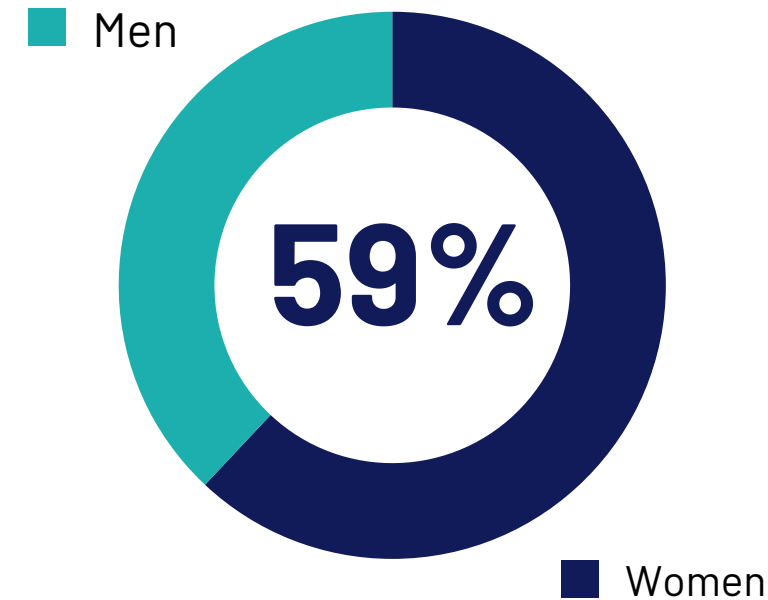
Despite time gap women are more likely to be searching for terms related to salary, pay rise and burnout

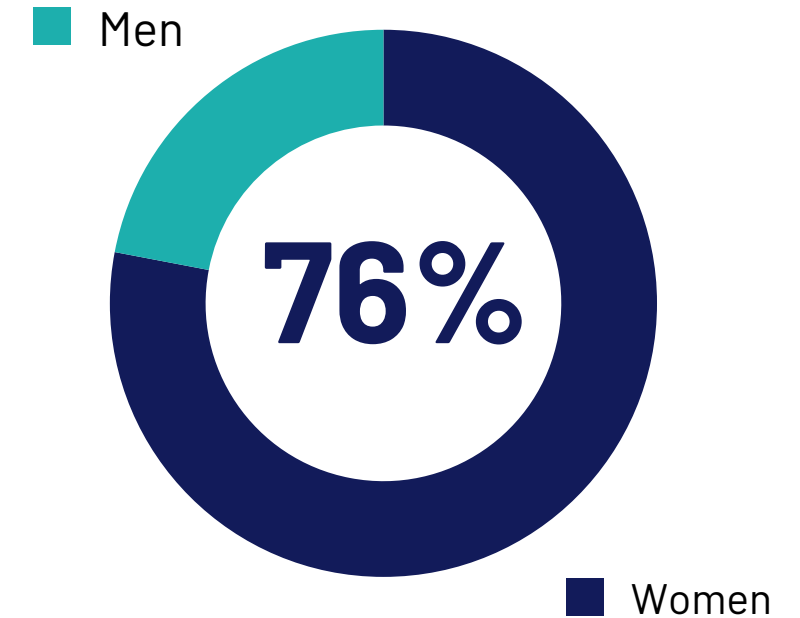Percentage share of people making searches containing each key words

'Salary'

Men

56%

Women

'Pay rise'

Men

59%

Women

'Burnout'

Men

76%

Women

Ipsos

We know that men are less likely to take care of themselves – particularly their mental health
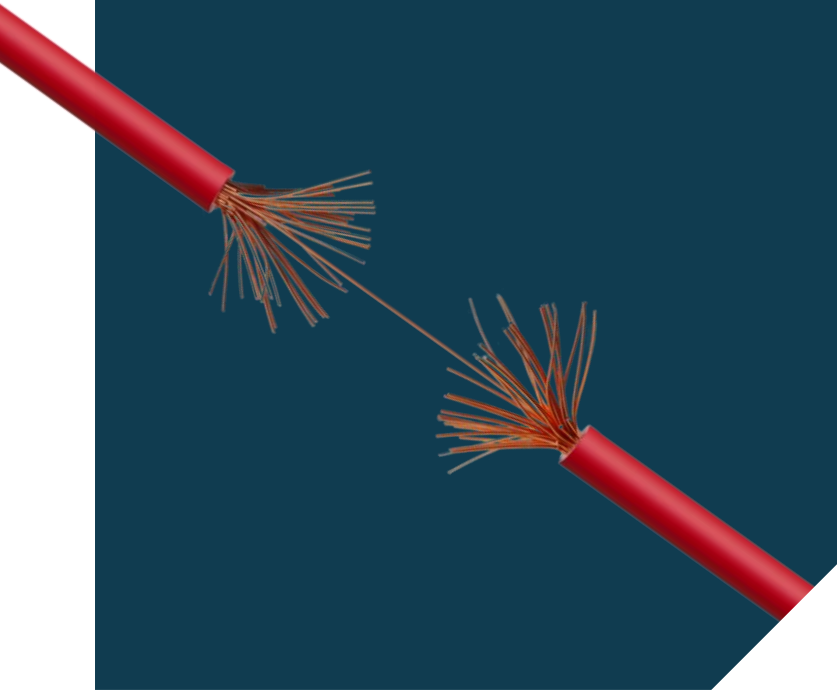
Share of time spent for health categories

General Health
- 39% Men
- 61% Women

Fitness & Exercise
- 40% Men
- 60% Women

Mental health & wellbeing
- 18% Men
- 82% Women

Ipsos

Gap for mental health widens with age

Share of time spent – Mental Health & wellbeing

	Women	Men
18-34	74%	26%
35-54	82%	18%
55+	92%	8%

Women   **Men**

Ipsos

But men are less likely to be reading about it too

Percentage share of people making searches containing each key words

'Anxiety'

Men

73%

Women

'Depression'

Men

68%

Women

'Mental health'

Men

68%

Women

Analysis starts April '24 due to changes to 'Mental Health & wellbeing' category in iris

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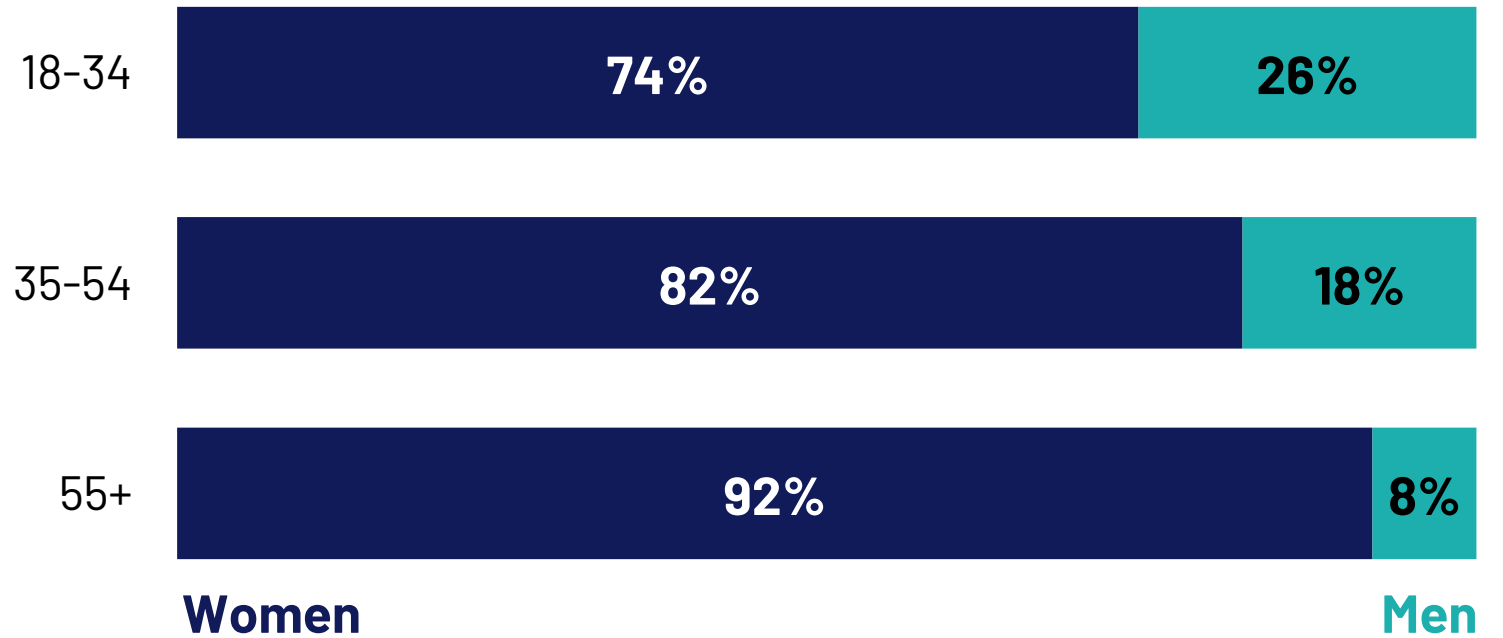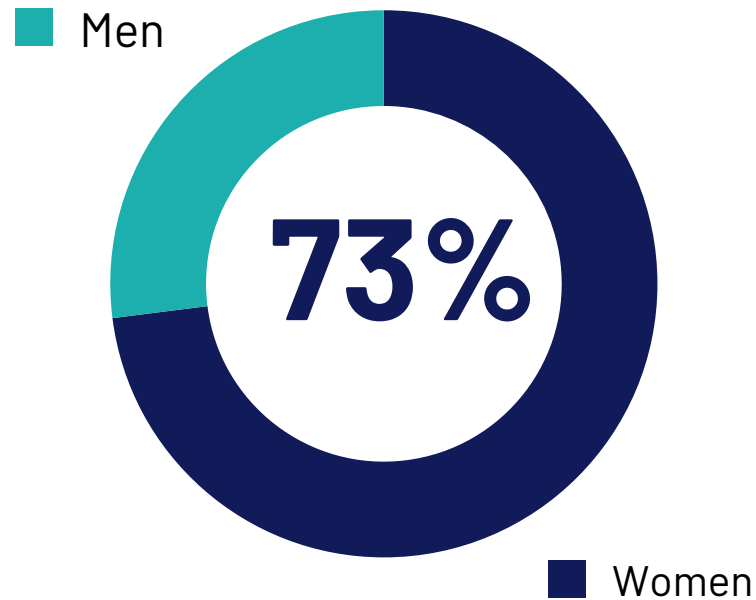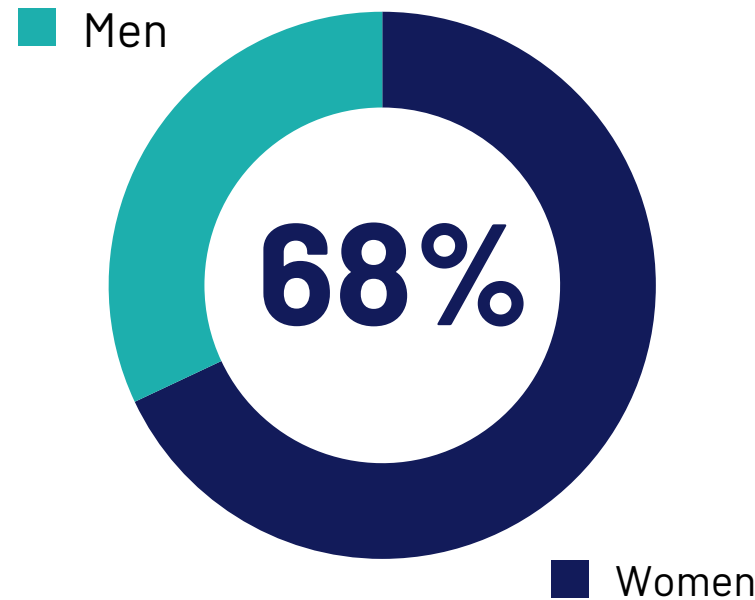
33

Source: Ipsos iris Online Audience Measurement Service, Jan - June 2024. All aged 18+ using PC/laptop, smartphone or tablet device(s). Pulled from passive data

Ipsos

Straight men are the least likely to be accessing mental health & wellbeing content

Monthly reach of mental health & wellbeing category

LGB+

Heterosexual

22% Women

18% Men

12% Women
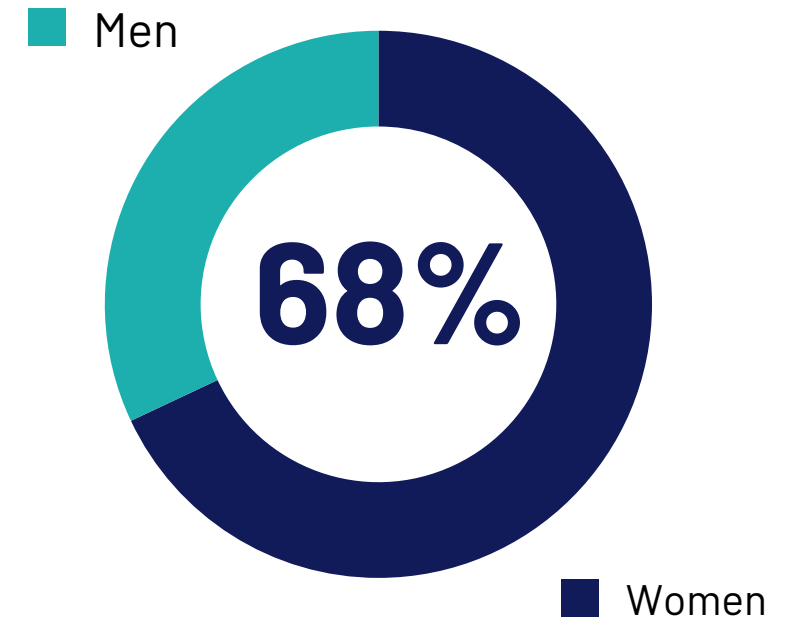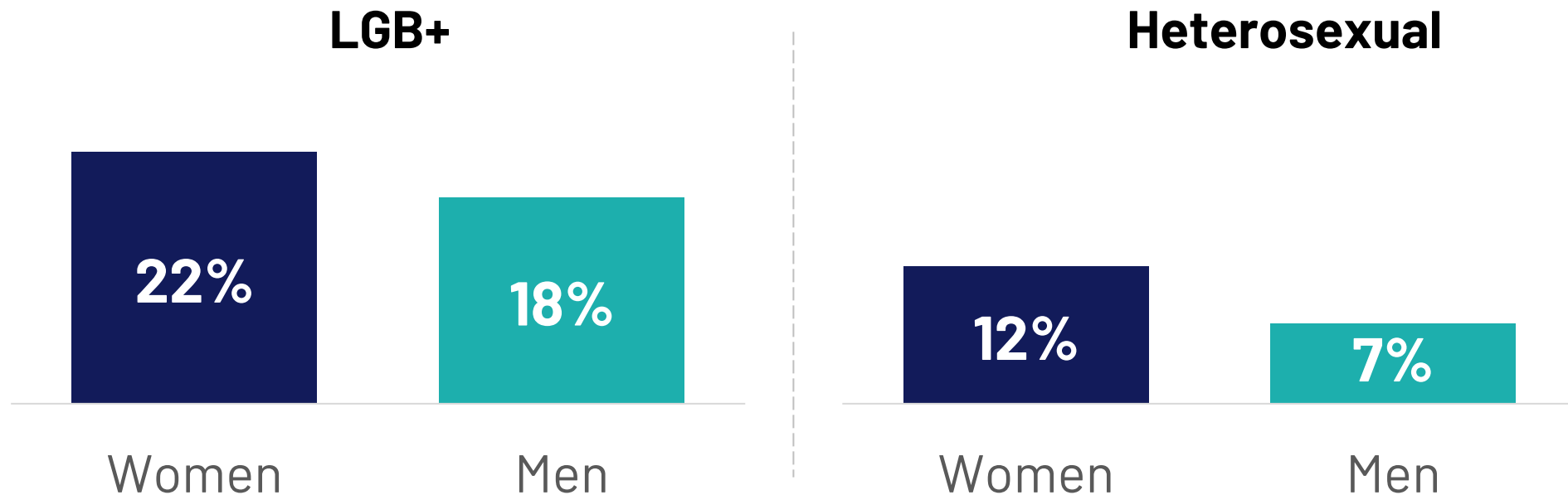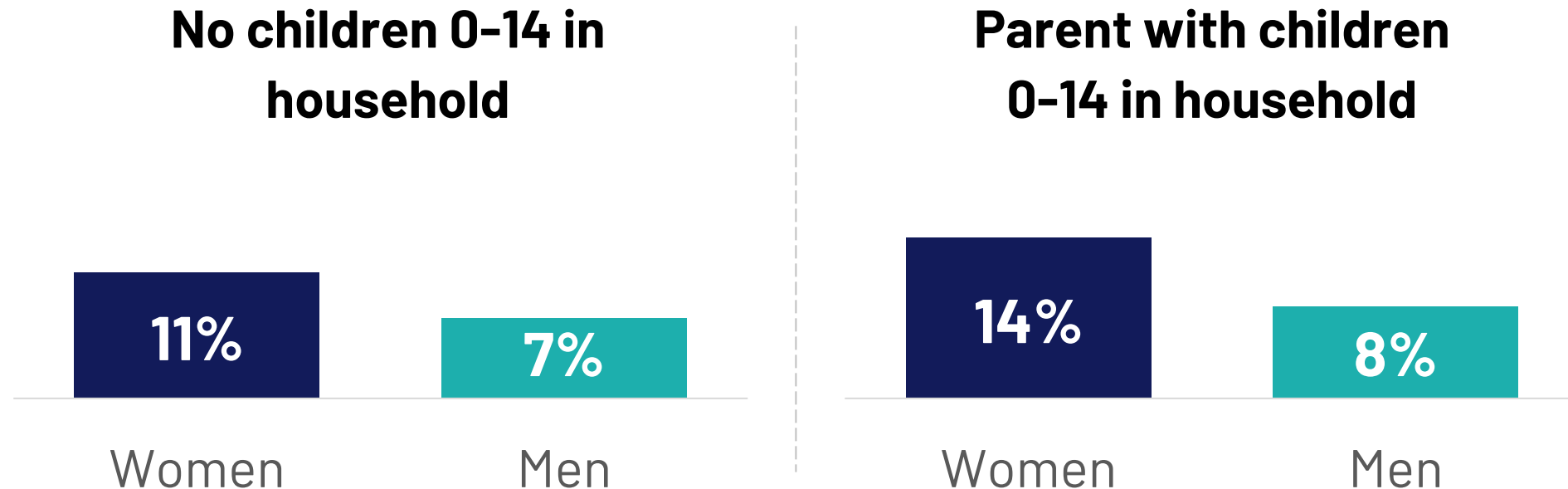
7% Men

Straight men are the least likely to be accessing mental health & wellbeing content

Monthly reach of mental health & wellbeing category

No children 0-14 in household

Women	Men
11%	**7%**

Parent with children 0-14 in household

Women	Men
14%	**8%**

Analysis starts April '24 due to changes to 'Mental Health & wellbeing' category in iris
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Ipsos

WHAT CAN YOU DO?

Finding the win- win for
society and business

WHAT CAN I DO?

▼

1. Know your audience

Ensure you know exactly who your audience is to ensure your fully meeting their needs and identify any gaps

Women 15-34 spend significantly more time on tech sites than men their age

For 35+ year olds, Men over index on time spent.

Women 55+ spend twice as much time on games online vs. men their age

There is 6ppts gap in audience size for sports by gender. The gender gap by time spent is 59ppts

Do we need to do more to tailor content in some areas to engage women more?

WHAT CAN I DO?

1. **Know your audience**

Ensure you know exactly who your audience is to ensure your fully meeting their needs and identify any gaps

2. **Show your audience**

Lead by example: create content and marketing that challenges stereotypes and exhibits positive role models

Ipsos

Marketing has a lot to answer for over the years as well

Do not perpetuate Harmful stereotypes

Ads showing domestic chores continue to feature women in these roles. Not only are they depicted as the ones doing the chores, but the Ipsos US (GEM®) database shows that women in ads mostly feature in family roles and in the home.

Share of ads with women by role

Role	Share
Wife / Girlfirend	30%
Mom / Grandmother	27%
General Professional	18%
Friend	15%
Athlete	4%
STEM Professional	3%
Business Owner	3%
Artist	2%
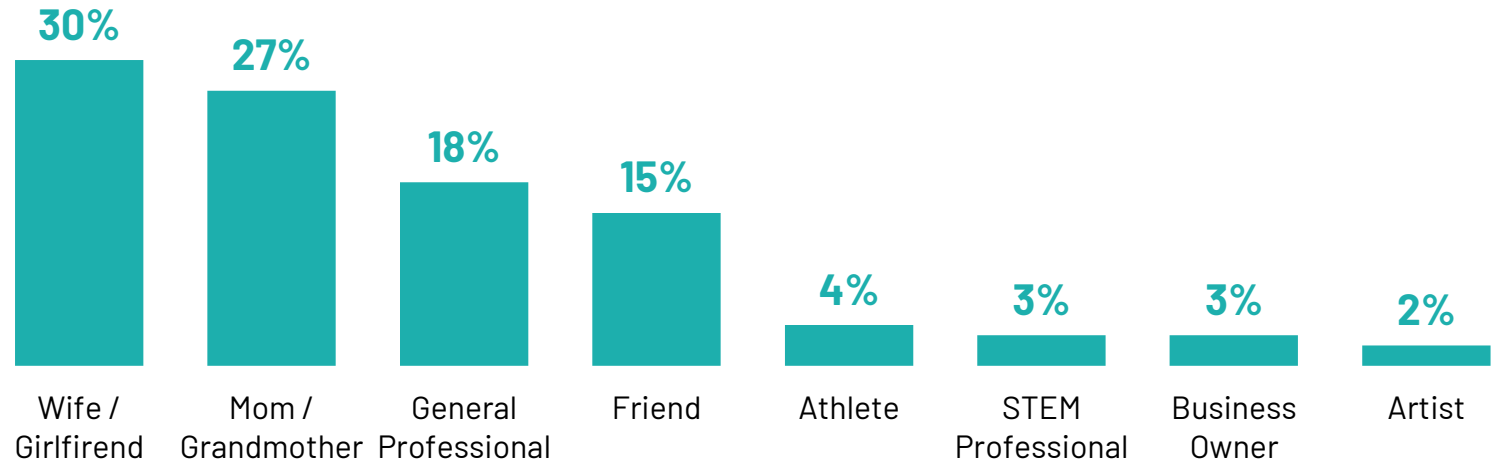
Share of ads with women by location

Location	Share
Kitchen	22%
Living room	22%
Car	19%
Office / Place of work	14%
Store	9%
Bathroom	8%
Sporting event / Practice	5%
Classroom	1%
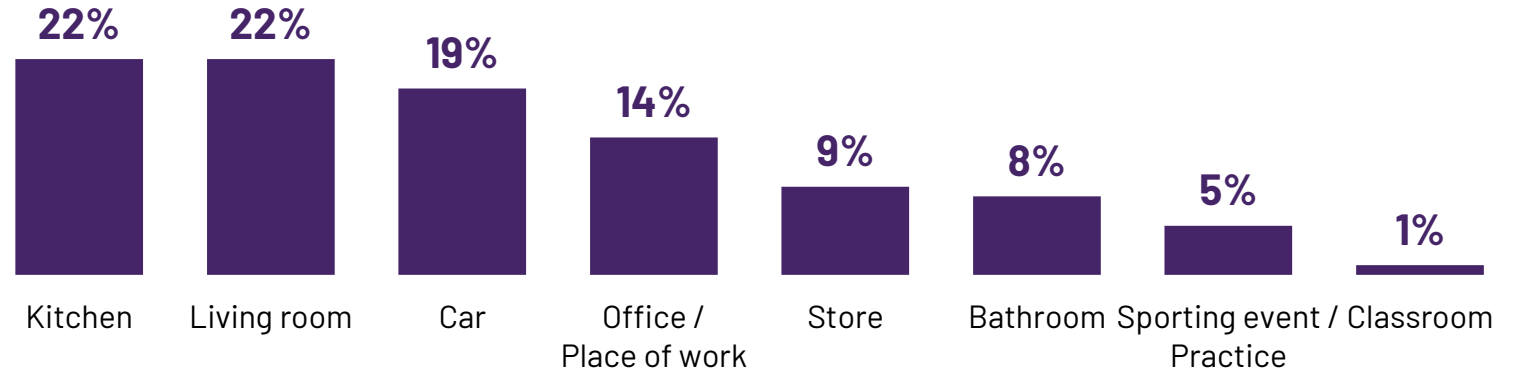
Avoid Perpetuating power dynamics

Brunel University in collaboration with Starling Bank analyzed over 600 photographs used for articles about money and finance. They found that men and women were depicted very differently. Men were shown as being in control and making financial decisions, whilst women were shown clutching piggy banks and counting pennies.

Watch out on the Deletion of women

An analysis by the Geena Davis institute of Cannes Lions films from 2006-2021 revealed that it wasn't until 2021 that the creative work submitted reached a near parity in the share of female characters.

Though female characters still displayed less autonomy than their male counterparts, there were some signs of the gender gap narrowing in depictions of authority and leadership between 2019 and 2020.

Gender representation in Cannes Lions Film and Film Craft Creative Work from 2006 to 2021
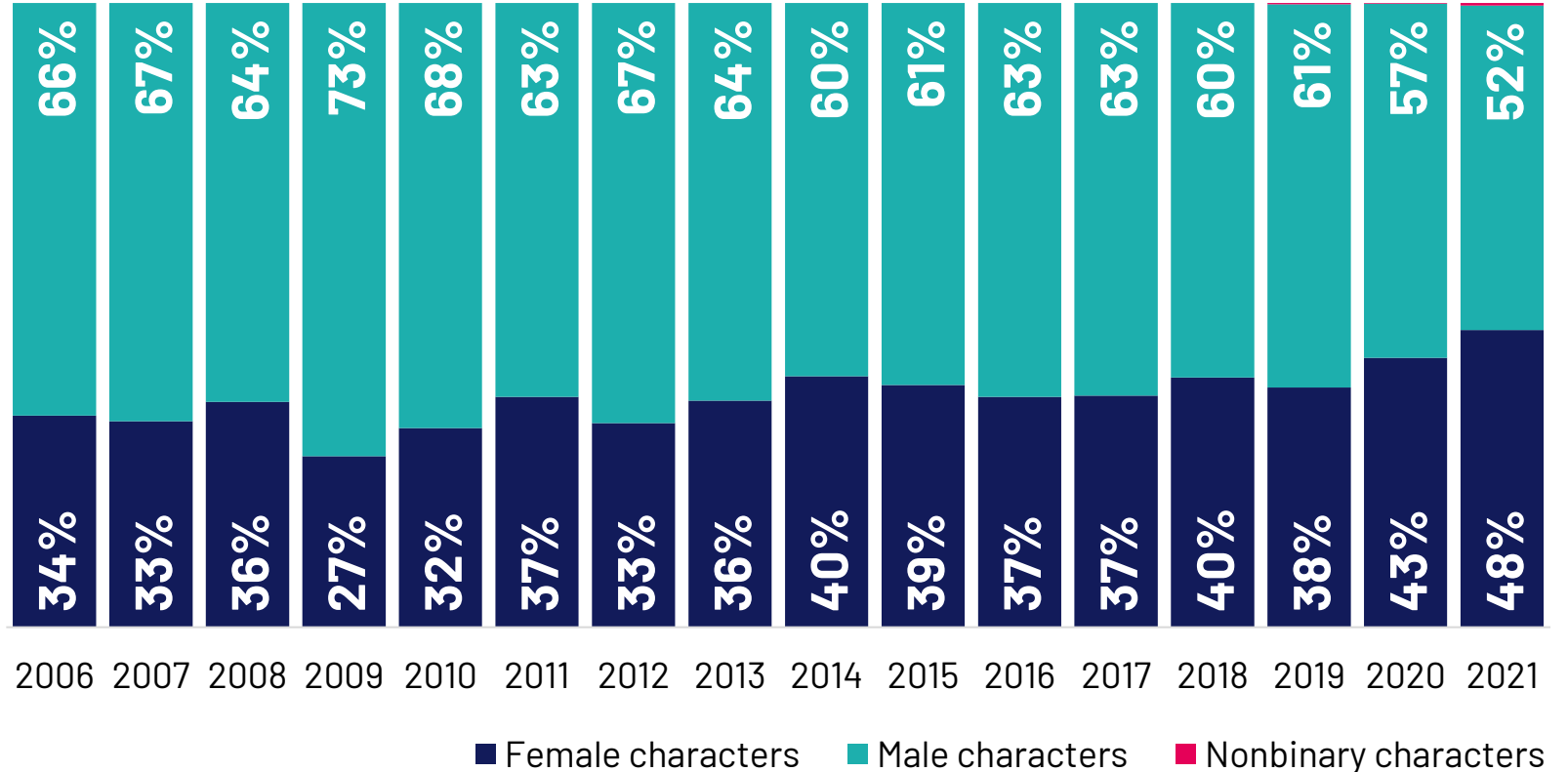
Year	Male characters	Female characters
2006	66%	34%
2007	67%	33%
2008	64%	36%
2009	73%	27%
2010	68%	32%
2011	63%	37%
2012	67%	33%
2013	64%	36%
2014	60%	40%
2015	61%	39%
2016	63%	37%
2017	63%	37%
2018	60%	40%
2019	61%	38%
2020	57%	43%
2021	52%	48%

■ Female characters   ■ Male characters   ■ Nonbinary characters

WHAT CAN I DO?

1. **Know your audience**

Ensure you know exactly who your audience is to ensure your fully meeting their needs and identify any gaps

2. **Show your audience**

Lead by example: create content and marketing that challenges stereotypes and exhibits positive role models

3. **Grow your audience**

Progressive portrayal pays: advertising with high gender equality measurement scores perform better

GEM® Index: How Ipsos measure gender portrayal in ads and content

Ipsos includes gender equality measure questions in all its ad testing research for ads that feature people. We ask the question of men/boys as well as women/girls to help identify gender bias in media

To generate the total GEM Index score, each measurement characteristic is benchmarked and indexed against the average score for that characteristic. The total GEM score is the average index of the four characteristics giving equal weight to each input. And Index of 100 signifies an average score

Presentation

What is the overall opinion of the person presented?

Respect

Are they presented in a respectful manner in the ads?

Appropriate

Are they depicted inappropriately?

Role Model

Can they be seen as a role model for other *<gender as appropriate>*?

Progressive female portrayal is good for business

In **Europe**, video ads with high Gender Equality Measure® scores are more likely to score highly on...

Strong sales lift
(short-term business effects)

+32%

As measured by the Creative Effect Index in Ipsos Creative Spark testing, which is validated to sales lift in market using market mix modelling data

Brand equity share gain
(long-term business effects)

+33%

As measured by the Equity Effect Index in Ipsos Creative Spark testing, which is validated to equity share gain in market using brand tracking data
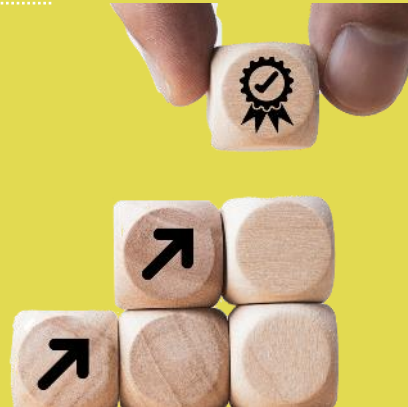
Progressive male portrayal is good for business too!

Globally, video ads with high Gender Equality Measure® scores are more likely to score highly on…

Strong sales lift
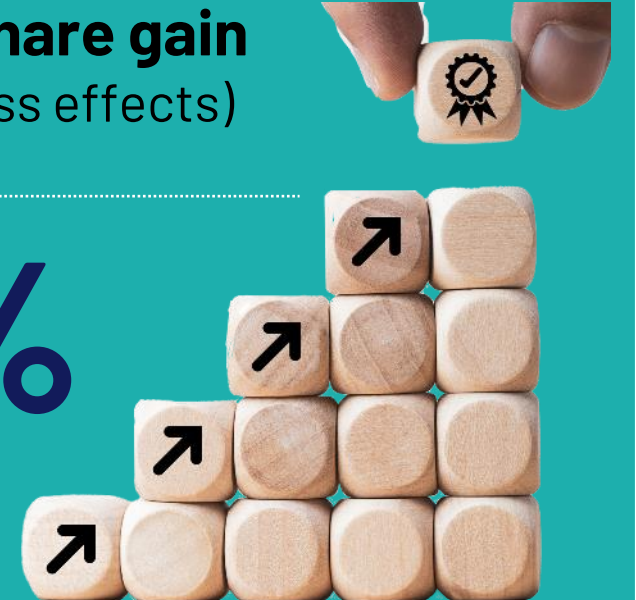(<u>short-term</u> business effects)

+37%

As measured by the Creative Effect Index in Ipsos Creative Spark testing, which is validated to sales lift in market using market mix modelling data

Brand equity share gain
(<u>long-term</u> business effects)

+38%
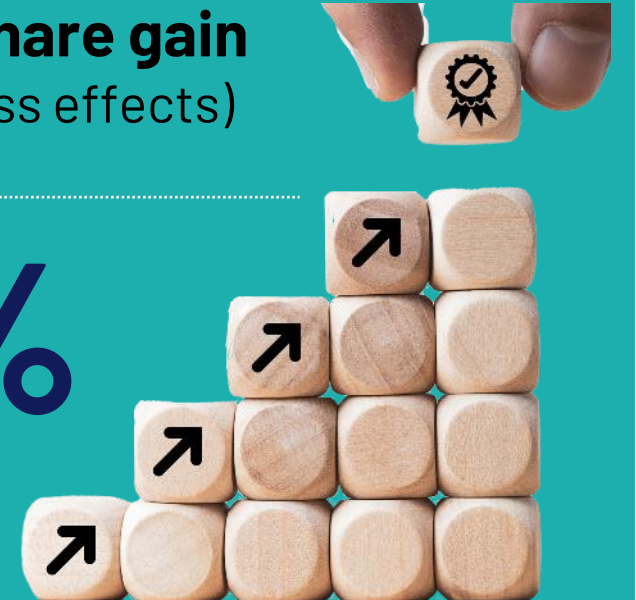
As measured by the Equity Effect Index in Ipsos Creative Spark testing, which is validated to equity share gain in market using brand tracking data
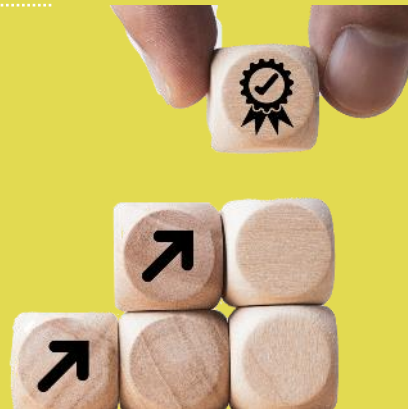
WHAT CAN I DO?

1. KNOW YOUR AUDIENCE

Understand your users and their needs: What career support do mothers need? What mental health services would men use?

2. SHOW YOUR AUDIENCE

Lead by example: create content and marketing that challenges stereotypes and exhibits positive role models

3. GROW YOUR AUDIENCE

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ANY QUESTIONS?

APPENDIX & DEFINITIONS

Category definitions

Categories are applied at the lowest level of websites and apps (sections, Android and iOS apps) and they are categorised within these industries based on their subject and content.

Category	Definition
Health	Contain information about several different health topics, e.g. health information, medical, fitness and pharmaceutical. Examples: menshealth.com and nhs.co.uk
Mental Health and Wellbeing	Provides information and support to people based on their psychological and emotional wellbeing. Examples: mentalhealth-uk.org, mind.org.uk, betterhelp.com and Headspace App.
Career	Includes content or services within career-related areas. This would include job searches, salary information, details from a job search, company reviews, interview techniques and resources. Examples: uk.indeed.com, Linked app, jobs.theguardian.com
Retail & Commerce	Allows online sales of goods and services. This can range from buying clothing, car accessories, gardening products, etc. Examples: comparethemarket.com and ocado.com/webshop/startWebshop.do

Target definitions

Profiling information is derived from a recruitment questionnaire that all panellists fill in. This data, in conjunction with our establishment survey and anonymous device data, is used to model and weight our synthetic panel to be representative of the total UK internet population.

Term	Definition
Main shopper	Main shopper is based on those who answer the following question and say they purchase 'all or most items' Thinking about all of the items purchased for your household from supermarkets and food shops, do you personally select…? *All or most items* *About half* *A few* *None or almost none*
Children in household 0-15	How many children 0-15 live in your household? *0,1,2,3,4,5,6,7,8,9+*
Parent or guardian	Are you a parent or guardian? *Yes* *No* *Prefer not to say*

Target definitions

Profiling information is derived from a recruitment questionnaire that all panellists fill in. This data, in conjunction with our establishment survey and anonymous device data, is used to model and weight our synthetic panel to be representative of the total UK internet population.

Term	Definition
Sexual orientation	Which of the following describes your sexual orientation? *Heterosexual/Straight* *Gay/Lesbian* *Bisexual* *Identify in another*
Marital status	Which one of these best describes your marital status? *Married / living with partner / civil partnership* *Single / widowed / divorced / separated*

Search data

All 'search' data is pulled from our passive data set, derived from our panel of 10,000+ internet users aged 15+.

It is based on the terms that our panellists are searching for specifically on search engine websites like Google or Bing.

For this presentation, we cleaned up the data using our proprietary AI tool, Ipsos Facto, to remove searches that did not appear to pertain to the individual or their friends or family. For example, we removed searches from 'salary' that were about the salary of celebrities or public figures. Similarly, for 'anxiety' we removed searches that appeared to be about pets.

ABOUT IPSOS IRIS

Key pillars of approach

Establishment survey

10,000 single source passive mobile first multi device panel

DATA SCIENCE
Brings all of this together

Distributed Content and Server to Server Integration

Site-centric measurement
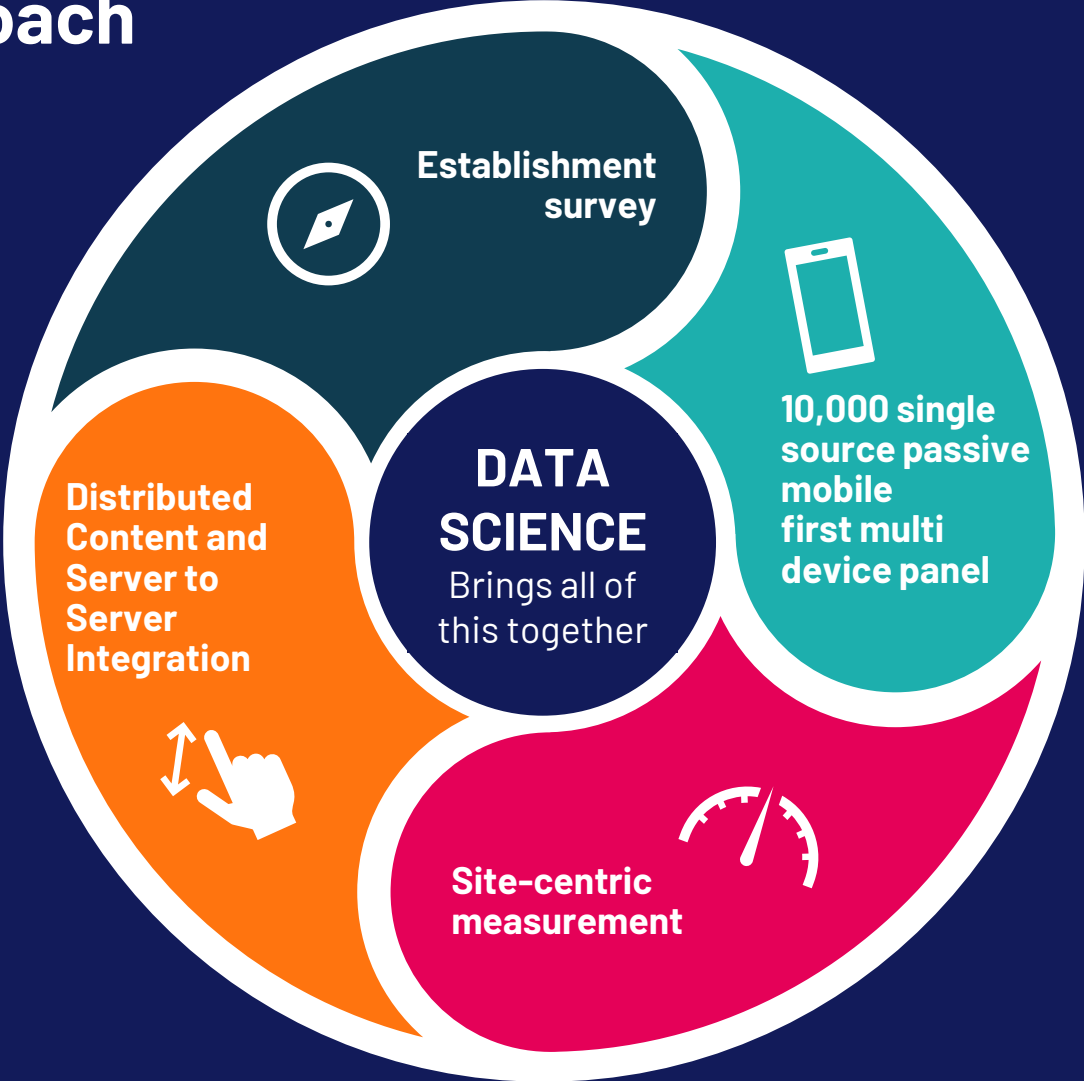
Ipsos iris provides you with these key metrics

Desktop / laptop, smartphone and tablets

Websites, mobile websites and apps
(c7,000 sites and c1,500 apps)

Monthly data segmented by day of week, weekday, weekend with some time of day analysis

Text and video

Demographic, geographic, and attitudinal audiences

Daily data
(36hrs after)

Interest based categorisations
e.g. sport, food, news, technology, finance etc

Enhanced audiences
e.g. ACORN, FRESCO, psychographic segmentation

Rich profiling and targeting capabilities

Age	Disabilities	Interests
Gender	Children	Live TV days
Sexual orientation	Parent / guardian / grandparent	Live TV hours
Social grade	HH size	Radio days
Ethnicity	Main shopper status	Radio duration
Income	Nation	Regular paper use
Chief income earner	Region (ITV / GOR)	Regular paper duration
CIE working status	Cities & towns	Magazine use
Marital status	Lifestyle statements	Magazine duration

Attitudes underpin behaviour

1.	You should seize opportunities in life when they arise
2.	I find it difficult to balance work, children and social life
3.	I often do things on the spur of the moment
4.	I have a keen sense of adventure
5.	I want to get to the very top in my career
6.	I make a conscious effort to recycle
7.	I would be willing to volunteer my time for a good cause
8.	I take great pleasure in looking after my appearance
9.	I prefer to be active in my leisure time
10.	Money is the best measure of success
11.	I like to go to trendy places to eat and drink
12.	It's worth paying extra for quality goods
13.	I am prepared to pay more for products that make life easier
14.	I buy new products before most of my friends
15.	I only buy products from a company whose ethics I agree with
16.	Celebrities influence my purchase decisions
17.	I would be prepared to pay more for environmentally friendly products

18.	I spend a lot of money on toiletries and cosmetics for personal use
19.	I really look after my health
20.	I wear designer clothes
21.	I like to keep up with the latest fashions
22.	I try to keep up with developments in technology
23.	I change the decorations at home as often as I can
24.	I am passionate about travelling
25.	With a credit card I can buy the sort of things I couldn't normally afford
26.	I look for profitable ways to invest my money
27.	I like different people, cultures, ideas and lifestyles around me
28.	I am increasingly aware of the price of goods and services
29.	I like to enjoy life and don't worry about the future
30.	I am interested in any technology that saves me time
31.	I find it hard to find time to relax
32.	Online TV streaming services have changed the way I watch television
33.	I'm prepared to make lifestyle compromises to benefit the environment
34.	I make more purchases online than I do in store

Reports available

Media

Analyse media entities by target group. The results are based on your selection and category filters.

Media Plus

A flat reporting structure. The results are static and not based on your selection and category filters.

Category

Analyse top categories performance during selected months.

Profiling

Identify the profile composition of selected media.

Ranking

Rank organisations, brands, websites and apps.

Cross-visiting

Analyse cross visitation and duplication of audiences between different media entities.

% Change

Analyse the differences and changes between different time period.

Dayparts

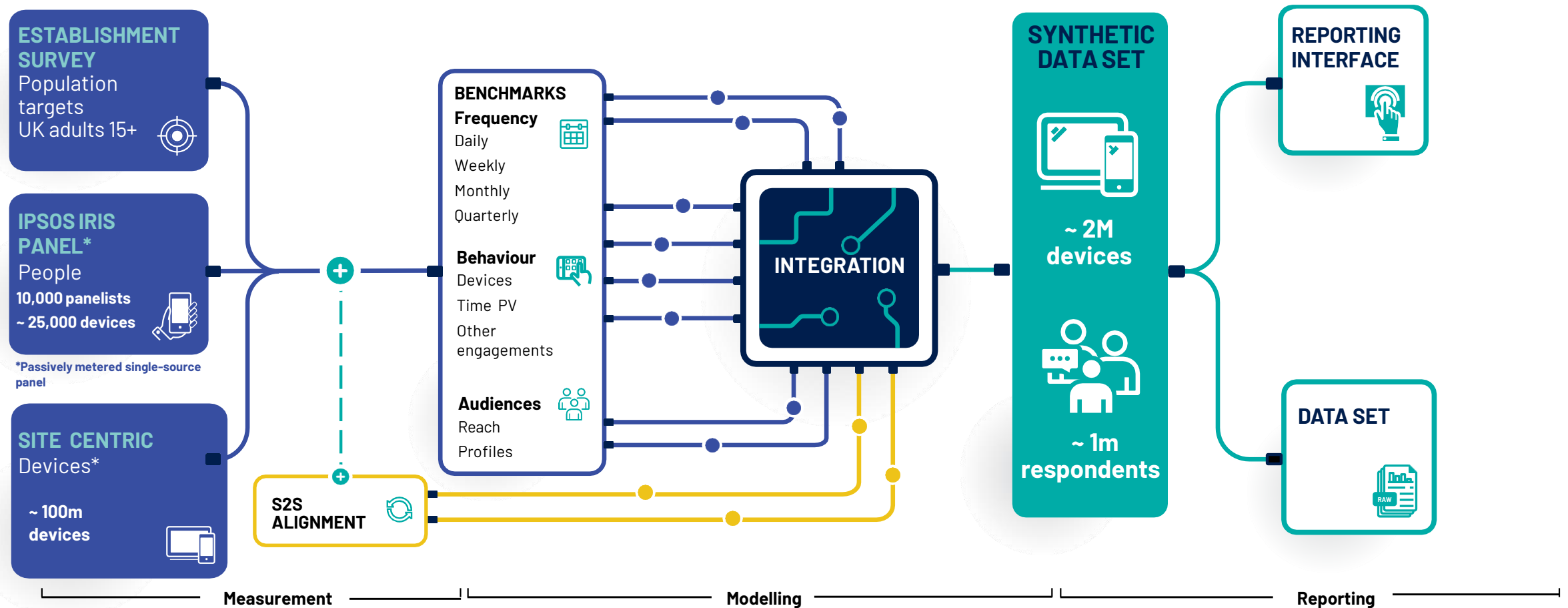See the breakdown of the selected media or category by time-of-day.

Trend Analysis

Check the performance of the selected media through multiple period of times.

Ipsos

Methodology

A hybrid measurement solution combining a single-source panel with site-centric measurement.

Ipsos iris is the UKOM-endorsed service for the measurement of audiences of online content. It uses a hybrid methodology combining metered data from a core 10,000 single-source panel with census site-centric measurement. The diagram below summarises the inputs and processes involved in the production of Ipsos iris audience data.

ESTABLISHMENT SURVEY
Population targets
UK adults 15+

IPSOS IRIS PANEL*
People
10,000 panelists
~ 25,000 devices

*Passively metered single-source panel

SITE CENTRIC
Devices*
~ 100m devices

S2S ALIGNMENT

BENCHMARKS
Frequency
Daily
Weekly
Monthly
Quarterly

Behaviour
Devices
Time PV
Other engagements

Audiences
Reach
Profiles

INTEGRATION

SYNTHETIC DATA SET
~ 2M devices
~ 1m respondents

REPORTING INTERFACE

DATA SET

Measurement — Modelling — Reporting

More detail on the methodology, including an interactive version of this slide can be find at: **https://ukom.uk.net/ipsos-iris-overview.php**