Numerator

CONSUMER DEEP DIVE

Breaking Stereotypes: The Women Driving Sales in Male-Centric Categories

Meet the female shoppers breaking category stereotypes.

Numerator's latest report focuses on the importance of female shoppers in categories historically targeted towards men. Over three-quarters of women identify as the primary shopper in their household, responsible for the bulk of purchasing when it comes to everyday goods they and their families use. While some categories continue to focus on men as the target consumer, **it's crucial not to overlook the value of female consumers** in these areas.

Categories of focus:

POWER AND HAND TOOLS

How are women engaging with the power & hand tools category and where should you focus your advertising and messaging to reach them?

VIDEO GAMES

Why do women play video games and how does a need for convenience play into the retailers and channels they select for buying games?

MEN'S RAZORS & DEODORANTS

Whether purchasing for their own use or someone else's, what factors influence women's decisions when buying men's self care products?

PERFORMANCE NUTRITION

What aspects of a healthy lifestyle resonate most with female shoppers, and how do their fitness preferences differ from men's?

Women influence billions of dollars in male centric-categories.

Whether women are purchasing a product to use themselves or for someone else, they are often the final decision maker when it comes to selecting which item to buy. This means that even in categories historically targeted towards male consumers, women command billions in spending.

POWER AND HAND TOOLS

61% of female consumers purchase category

58% of female buyers made the final product selection

Women spend **$7.4 B** annually on power & hand tools.

VIDEO GAMES

22% of female consumers purchase category

57% of female buyers made the final product selection

Women spend **$2.2 B** annually on video games.

MEN'S RAZORS & DEODORANTS

75% of female consumers purchase category

67% of female buyers made the final product selection

Women spend **$2.9 B** annually spend on men's branded razors & deodorants.

PERFORMANCE NUTRITION

16% of female consumers purchase category

78% of female buyers made the final product selection

Women spend **$1.1B** annually on protein powders.

Power & Hand Tools

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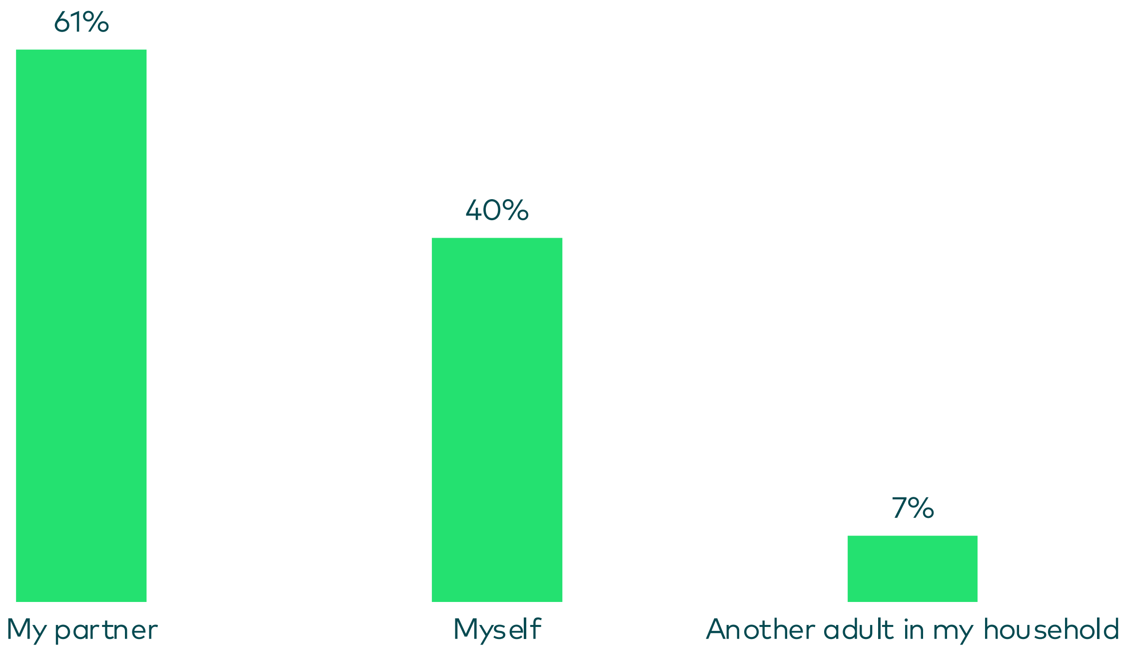
Over half of women are the final decision makers for the tools they buy.

While the majority of power & hand tool purchases women make are for their partners, two-fifths of women say they purchased these tools for their own use. Additionally, over half state they selected the product themselves.

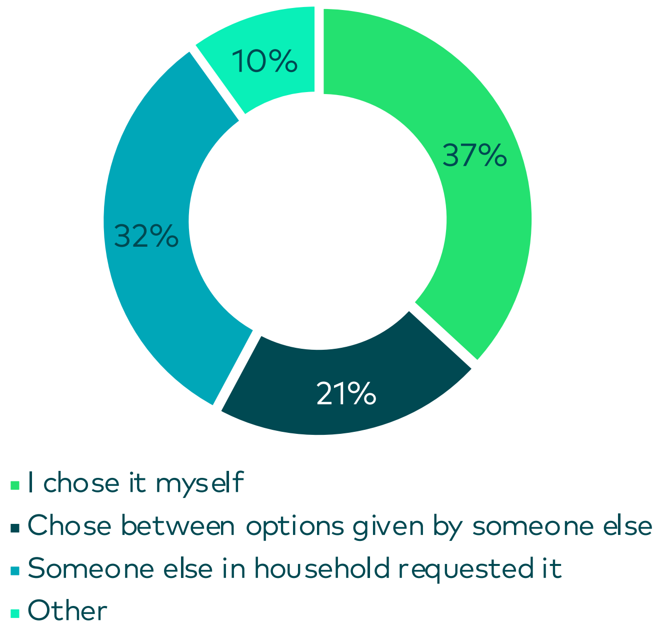
WHO THE PURCHASE WAS FOR

% female power / hand tool buyers



WHO MADE THE PURCHASE DECISION

% female power / hand tool buyers



Female homeowners are the most likely group to purchase power & hand tools.

Women who purchase power and hand tools are more likely to be married homeowners who live in rural areas. These products allow female tool buyers to carry out favorite activities like landscaping.

POWER AND HAND TOOL PROFILE

% female category buyers indexed to female non-category buyers

75%
Own their home
Index 108

60%
Are married
Index 110

49%
High income
Index 106

34%
Live in rural areas
Index 114

30%
Enjoy landscaping projects
Index 113

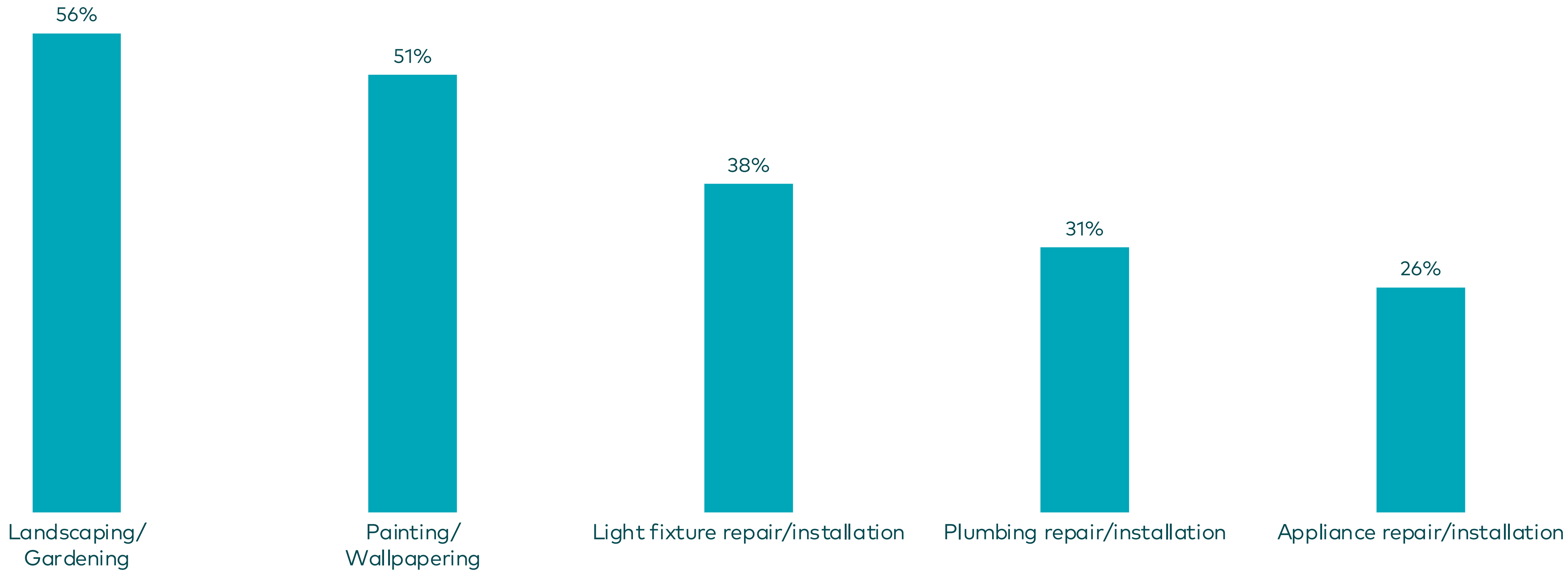
21%
Adult couples life stage
Index 117

Women take control of their home improvement projects.

Women are 20% more likely to complete home DIY projects compared to men. Landscaping, painting, and various repairs and installations highlight their passions and comfort around home improvement projects.

DIY PROJECTS COMPLETED

% of female power / hand tool buyers



Numerator Female Consumer Survey n= 625 power and hand tool buyers | What DIY projects have you completed this year?

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Pricing and promotion are influential factors in tool purchasing.

While women are more likely to clip coupons and check ads overall, this is especially true when they purchase hand and power tools. When purchasing these tools for themselves, women look to price, sales, and promotions to make a final decision.

PRICING SENTIMENT

Women vs. Men

27%

More likely to clip coupons

22%

More likely to check advertisements

POWER / HAND TOOL DECISION FACTORS

% of women who purchased power / hand tools for self-use

Left - Numerator Insights | 12 months ending 1/31/2022
Right - Numerator Female Consumer Survey n= 252 power and hand tool buyers | What DIY projects have you completed this year?

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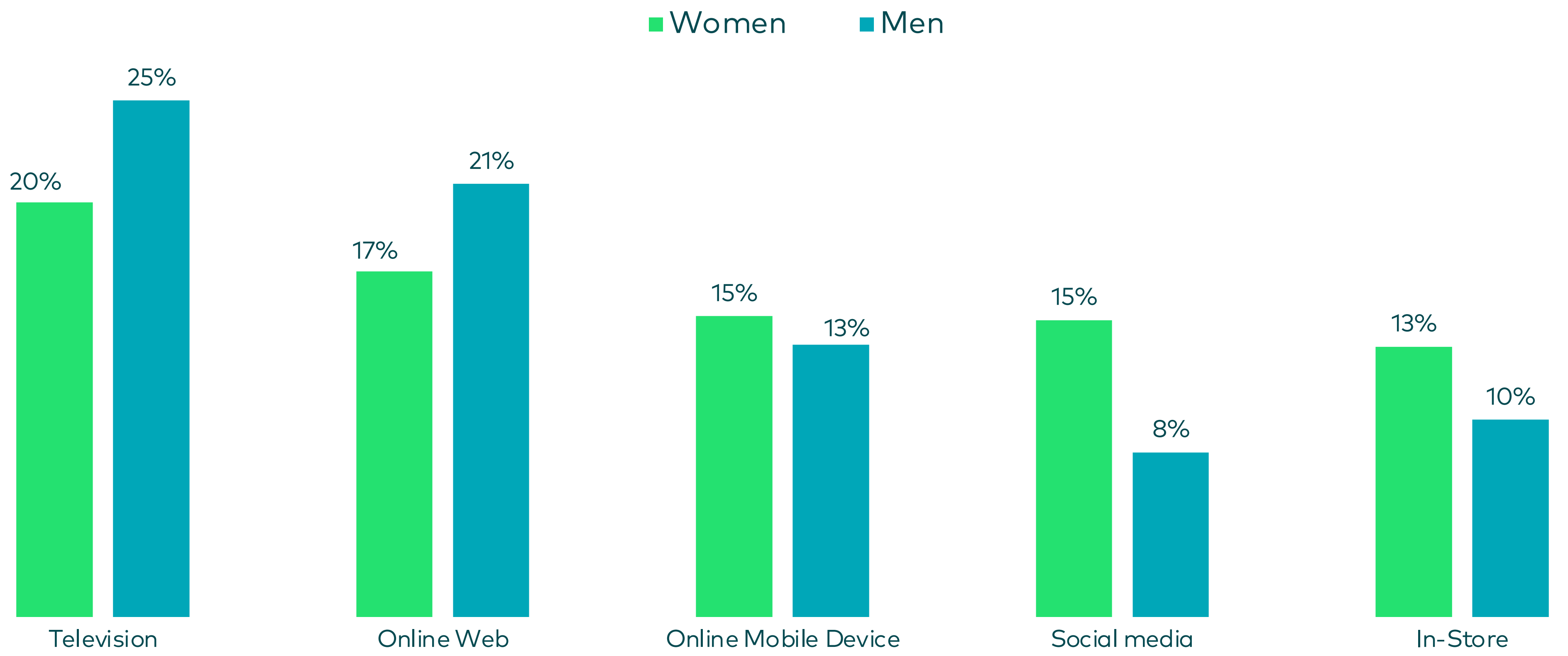
Social media and in-store ads are top media differentiators for women.

Compared to men, women are more likely to be influenced by online mobile, social media, and in-store advertising. Social media and mobile allow women to view and interact with ads no matter where they are and what they are doing.

MOST INFLUENTIAL ADVERTISING

% of women vs. % of men



Numerator Insights | 12 months ending 1/31/2022

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And social media is especially important when learning about tools.

Over a third of women learn how to use home improvement tools through instructional videos. Social media platforms that highlight video sharing like Instagram and TikTok offer opportunity for how-to videos from tool brands trying to reach women.

HOW WOMEN LEARN TO USE TOOLS

% of female power/ hand tool buyers

37%

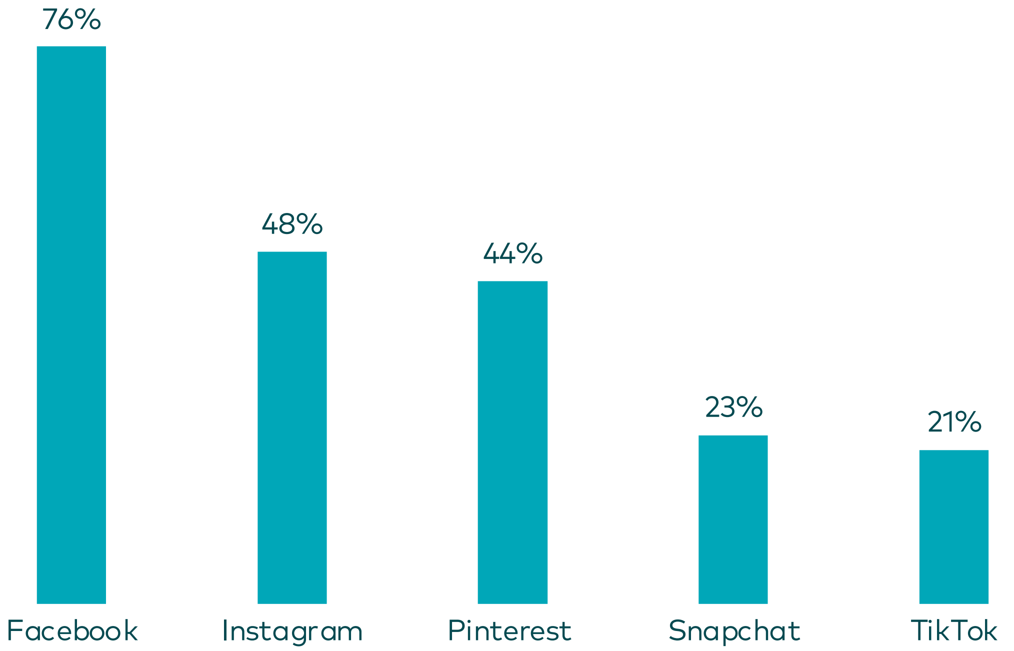
Learn from instructional videos

16%

Learn from online articles

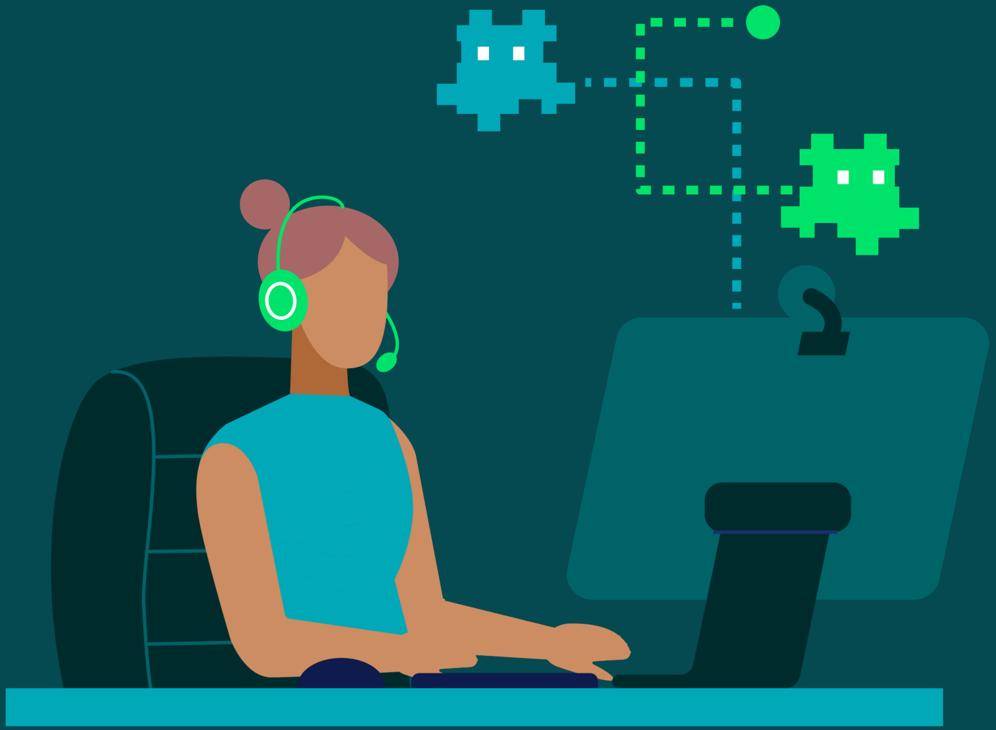
TOP SOCIAL MEDIA

% of women



Left - Numerator Female Consumer Survey n= 582 power and hand tool buyers | How do you learn to use home improvement tools?
Right - Numerator Insights | 12 months ending 1/31/2022

Video Games

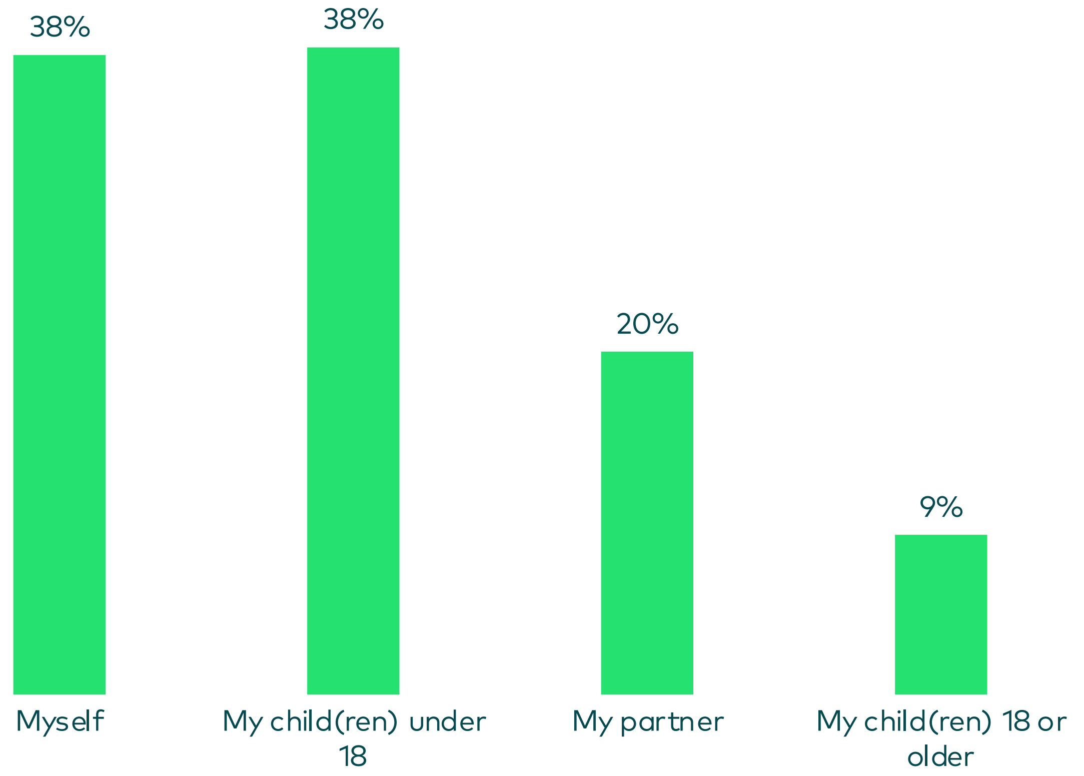


Women make video game decisions for both themselves and their children.

When a woman purchases a video game, she is equally likely to be purchasing for herself or her young children. But no matter who the game is for, she often has the last say in the product purchased— two-fifths of women choose with no input from others.

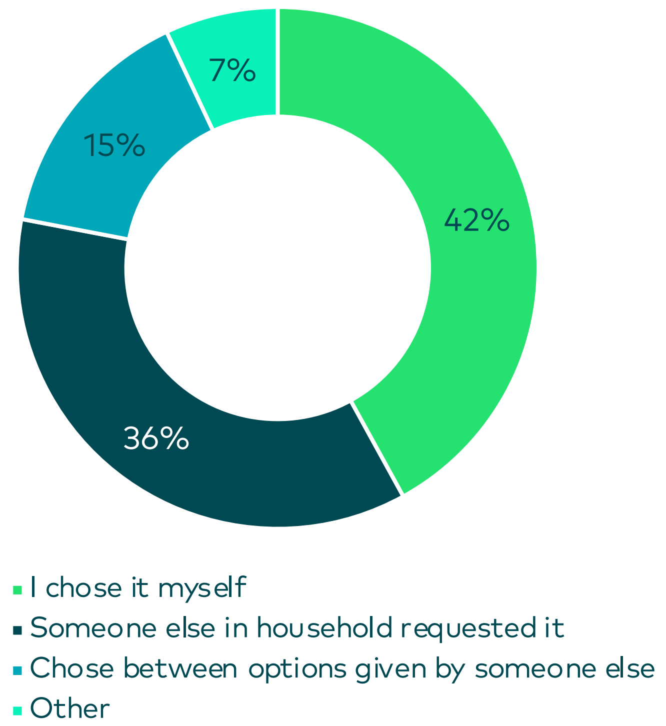
WHO THE PURCHASE WAS FOR

% female video game buyers



HOW THE PURCHASE WAS CHOSEN

% female video game buyers



Numerator Female Consumer Survey n= 447 female video game buyers | Who was this purchase for? | Who made the decision on which game to buy?

Younger mothers look for games the whole family can play.

Women who purchase video games are often millennial mothers from high-income households. When deciding on a video game she looks for family-friendly genres that she and her family can play casually.

FEMALE VIDEO GAME BUYER PROFILE

% female category buyers indexed to female non-category buyers

50%
Have children
Index 157

34%
Millennials
Index 140

50%
High income
Index 108

36%
Own a Nintendo device
Index 186

22%
Casual gamers
Index 119

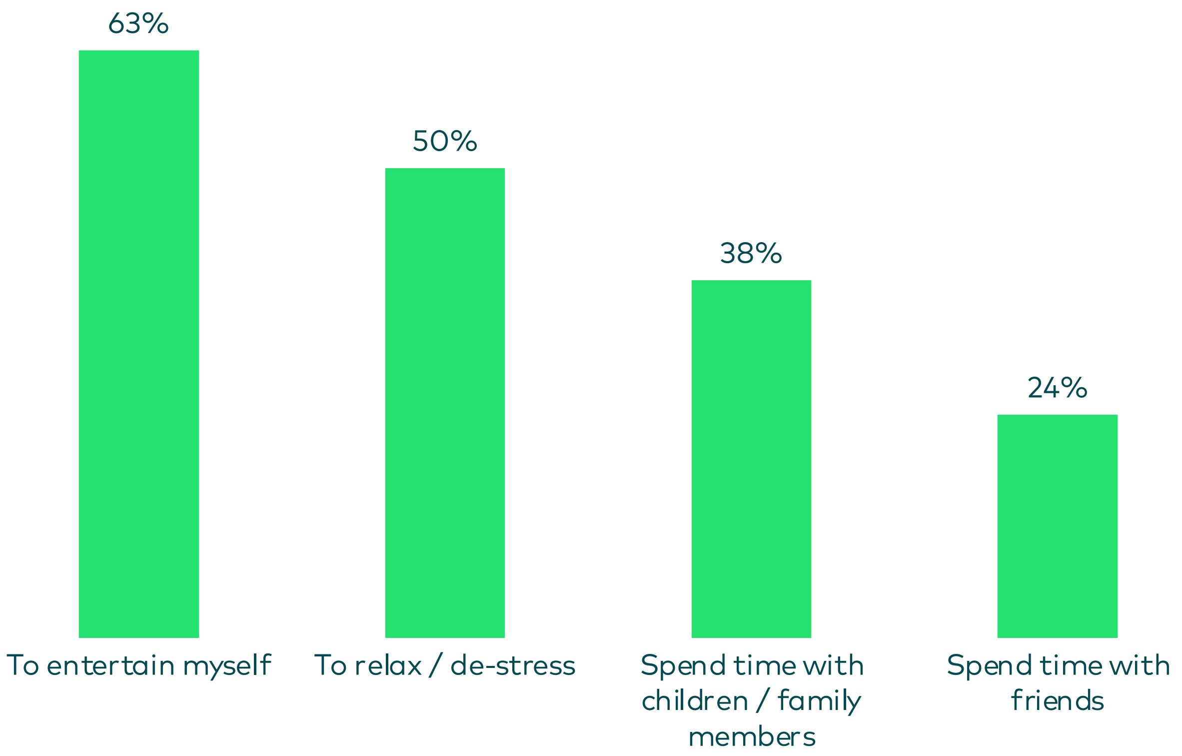
40%
Prefer family-friendly games
Index 130

Video games are a way to relax and build relationships for women.

Women who purchase video games for themselves use the entertaining activity to connect with others in their lives. Video games connect loved ones, allowing play between family members or friends.

REASONS FOR PLAYING VIDEO GAMES

% of women who buy video games for self



44% play with children in the household

35% play with a spouse, partner or significant other

13% play with friends

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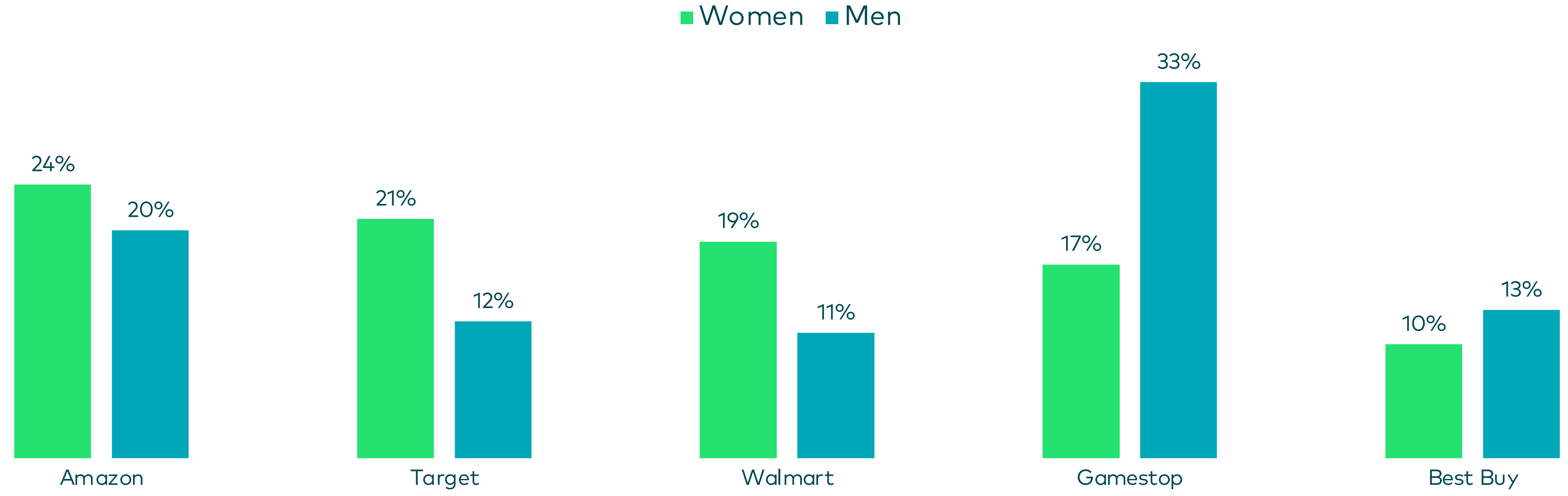
Numerator Female Consumer Survey n= 447 female video game buyers | Why do you play video games? | Who do you play video games with?

Preferred video game retailers highlight a need for convenience.

When buying video games, women prefer to shop at retailers they already visit like Amazon and Target. To best reach women in this category, brands should focus more on where women shop in their daily lives and less on specialty or electronics retailers.

TOP VIDEO GAME RETAILERS

% of women | % of men



Online shopping offers additional convenience to fit busy schedules.

Women look for shopping solutions that fit their lifestyles and are more likely to utilize online shopping and curbside pickup than men. Online is the preferred channel to fit video game purchasing into busy schedules.

SHOPPING SENTIMENTS

% of women indexed to men

38%

Find online shopping convenient.

index **123**

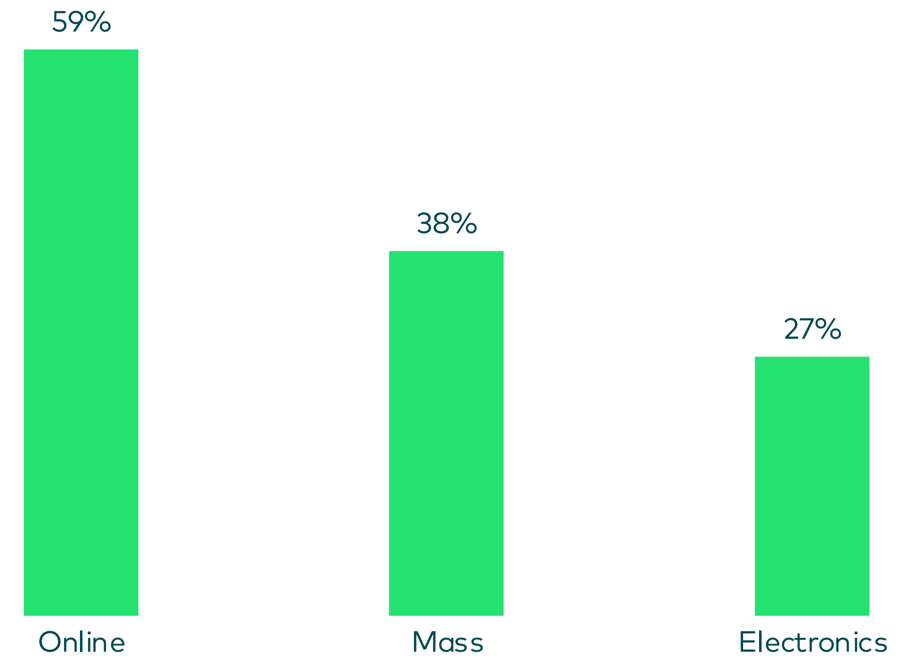
30%

Have used curbside pickup this year.

index **150**

TOP VIDEO GAME PURCHASING CHANNELS

% of female video game buyers



Men's Razors and Deodorant

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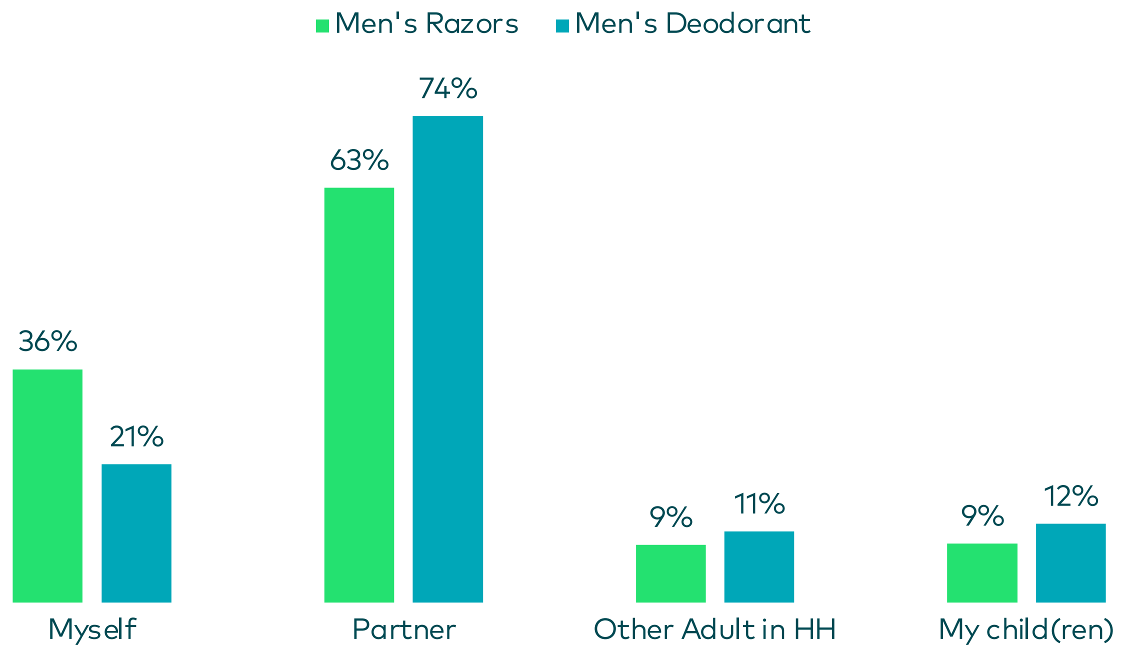
Women purchasing men's razors and deodorant are often buying for partners.

Despite not being the final product user, women are still the final decision makers in most of these purchases. Over half say they choose the item themselves or selected between options given by someone else.

WHO PURCHASE WAS FOR

% of women who bought category



68%

of women who bought men's razors for someone else were the final decision maker on the purchase– 51% chose themselves, 17% chose between options given by someone else.

50%

of women who bought men's deodorant for someone else were the final decision maker on the purchase– 40% chose themselves, 17% chose between options given by someone else.

Numerator Female Consumer Survey n= 878 female category buyers | Who was this purchase for? | Who made the decision on which [item] to buy?

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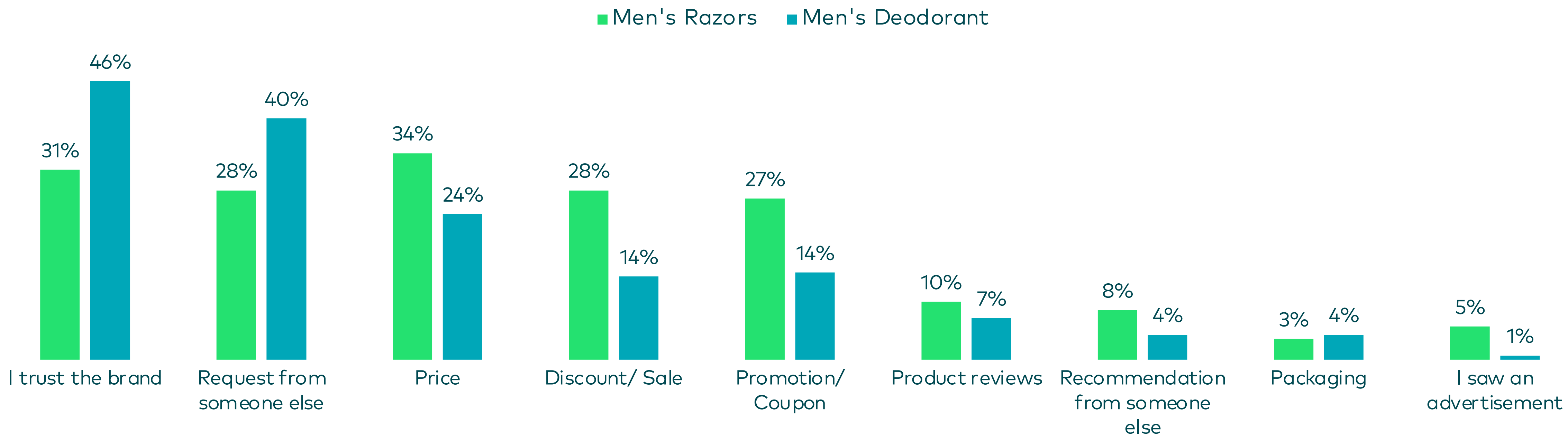
Decision factors among women buying men's products vary by category.

Nearly half of women who purchased men's deodorant for others said the main reason was brand trust, while the top driver for men's razor choice was price. Brands in these categories can appeal to women in advertising based on these decision factors.

DECISION FACTORS BUYING FOR OTHERS

% of women who purchased item for someone else



Numerator Female Consumer Survey n= 878 female category buyers| Which of the following factors influenced your decision to purchase [category]?

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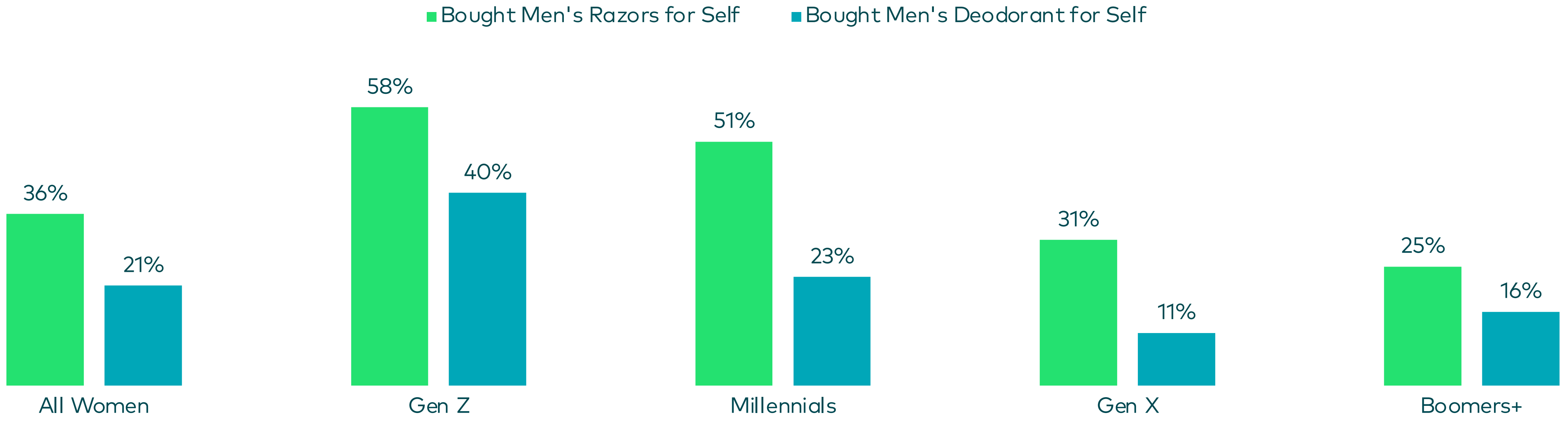
Younger women are more likely to purchase men's items for themselves.

Over a third of women purchase men's razors for their own use, and a fifth purchase men's deodorants for themselves— these numbers nearly double among Gen Z women, who are significantly more likely to purchase these items for themselves.

PURCHASING FOR SELF

% of female category buyers who...



% OF WOMEN WHO PURCHASED CATEGORY OVERALL

	All Women	Gen Z	Millennials	Gen X	Boomers+
Razors	44%	44%	43%	49%	41%
Deodorant	64%	63%	70%	72%	53%

Numerator Female Consumer Survey n= 878 female category buyers | Who was this purchase for? (top)
Numerator Insights | 12 months ending 1/31/2022 (bottom)

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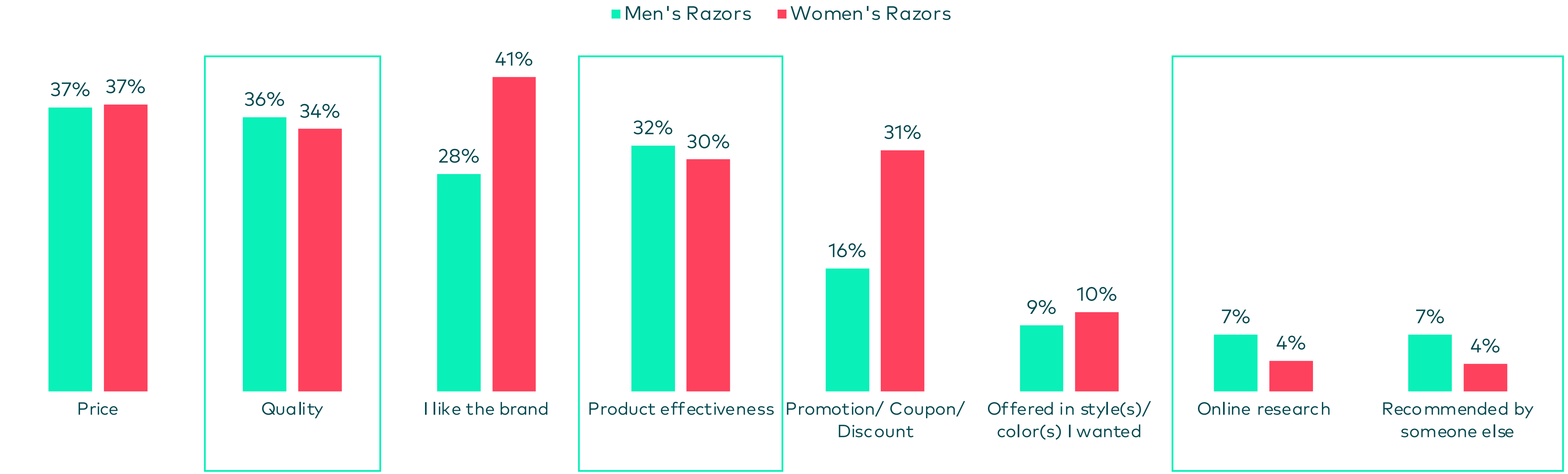
Quality and product effectiveness drives men's razor sales among women.

Women who purchase men's branded razors for self-use do so because they perceive the items as higher quality & more effective than women's razors. Women's razors, on the other hand, are purchased because of brand affinities or promotions & discounts.

REASON FOR PURCHASING GENDERED RAZORS

% women who bought for self



Numerator Female Consumer Survey n= 491 female razor buyers| Why did you choose to purchase a razor branded towards [gender]?

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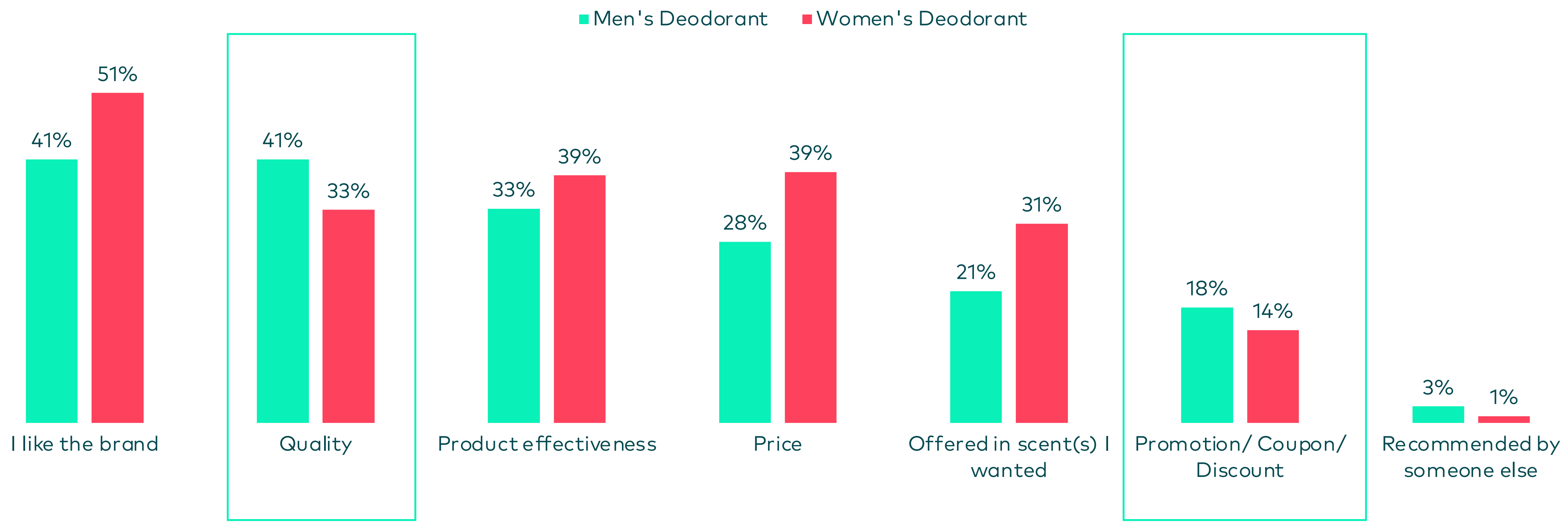
Deciding factors between men's and women's deodorants are less distinct.

Women who purchase men's branded deodorant for self-use view the men's versions as higher quality, or they purchase because of a promotion or discount, while those buying women's branded deodorants do so because of brand trust & scent options.

REASON FOR PURCHASING GENDERED DEODORANT

% women who bought for self



Numerator Female Consumer Survey n= 387 female deodorant buyers| Why did you choose to purchase a deodorant branded towards [gender]?

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Protein Powder

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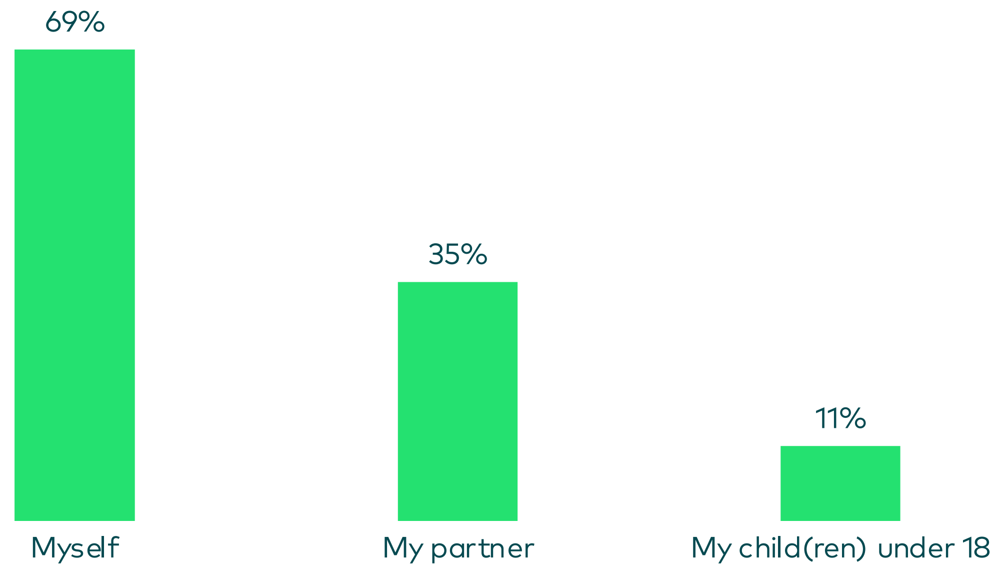
Women most often purchase protein powder for themselves.

Women are most likely to purchase protein powder for their own use, meaning they keep their own needs and perceptions top of mind when choosing between brands and product types.

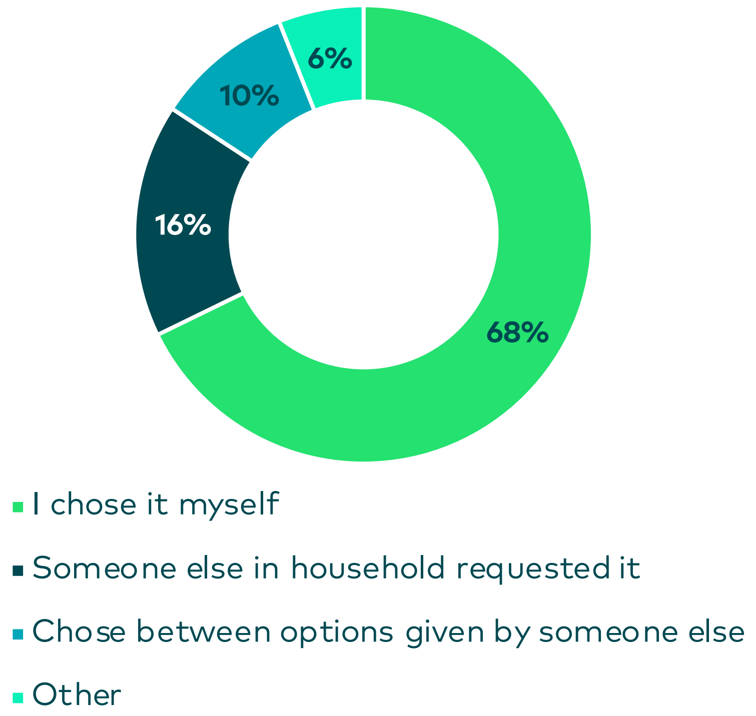
WHO THE PURCHASE WAS FOR

% female protein powder buyers



HOW THE PURCHASE WAS CHOSEN

% female protein powder buyers



Women who buy protein powder focus on a healthy lifestyle overall.

Women who purchase protein powder are more likely to be focused on their health than women who do not purchase the category. They are also more likely to have children, to live in a high-income household, and to exercise on a regular basis.

FEMALE PROTEIN POWDER BUYER PROFILE

% female category buyers indexed to female non-category buyers

38%
Have children
Index 119

29%
Millennials
Index 123

32%
Have an income of at least $125k
Index 121

35%
Exercise regularly
Index 130

30%
Have special diets
Index 136

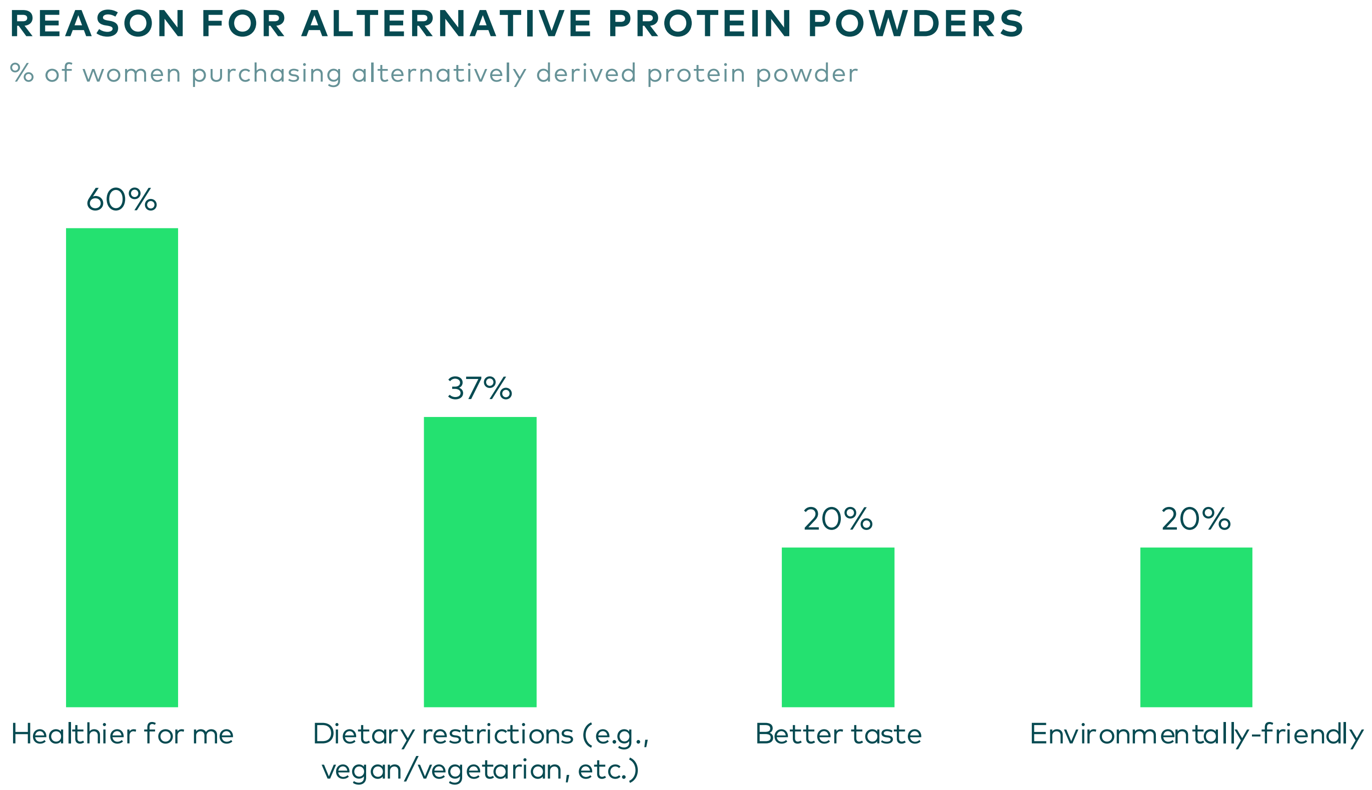
24%
Very concerned about eating healthy
Index 126

And a focus on health is apparent in the protein powder they purchase.

A desire for healthy products is also evident in the types of protein powder women choose to buy. A third of women purchasing protein powder seek out alternatively derived protein sources for health reasons, dietary needs, and taste.

31%

Seek out alternatively derived protein powder



Numerator Female Consumer Survey n= 535 female protein powder buyers | Do you seek out alternatively derived protein powder? Why do you seek out alternatively derived protein powders?

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These products help to fuel women's workouts, which often differ from men's.

Women show key differences in exercise preferences compared to men, with a higher focus on walking, swimming, and attending classes. Understanding what activities women participate in will help brands to better appeal to female category buyers.

TOP EXERCISE ACTIVITIES

% of women indexed to men

47%

Walk as an exercise activity
(Index 136)

21%

Swim as an exercise activity
(Index 149)

20%

Attend gym / fitness classes
(Index 113)

Women are incredibly valuable consumers to consider across all categories… even those historically targeted towards men.

POWER AND HAND TOOLS

Today's women aren't shying away from from tasks around the home requiring the use of power and hand tools. In fact, they're more likely than men to participate in hobbies like home DIY projects.

Online tutorials and social media platforms are valuable channels for brands & retailers in the home improvement space to attract and engage with women.

VIDEO GAMES

Video games allow women to connect with loved ones, especially those with children in the home, and moms hold a significant influence over the video games purchased for their households.

Emphasizing convenient shopping options like online ordering and curbside pickup will best fit busy lifestyles, as will targeting women at their already familiar retailers.

MEN'S RAZORS & DEODORANTS

While many women buying this category are doing so on behalf of someone else, over half are still the final decision makers in-store, meaning it's important to appeal to them in advertising and on the shelf.

Younger women are more likely to purchase men's self care products for their own use and do so because of perceived effectiveness— these women are key to future growth.

PROTEIN POWDER

Health-focused women are purchasing protein powders to supplement their wellness goals. Many are also looking to for a quick and convenient way to incorporate health hacks into their lives.

Brands looking to appeal to women in this space should focus on overall wellness, as well as understanding the use cases and exercise and wellness goals of women.

Know your consumer with certainty.

Interested in learning more about women's purchasing behavior? Numerator has what you need for the deepest, most comprehensive understanding of consumers with 2500+ demographic, psychographic and premium segmentation attributes available.

To dive deeper into the data outlined in this report, reach out to your Numerator representative or contact us at hello@numerator.com.

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