

FROM PALEOLITHIC

TO POSTMILLENNIAL:

GUT INSTINCTS

IN THE MODERN AGE

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On the savanna of prehistoric Africa, a woman and her child are in search of a predinner snack. Among the tall grasses and low shrubbery, she notices the taut, shiny skin of dark-purple berries. She approaches the berries. She reaches deftly into her gatherer's pouch.

And she pulls out a smartphone
... to call her girlfriend about what she fed her kids for a snack
... to snap a picture and post it on Facebook for her other 500
close friends to weigh in
... and to log on to her mommy message board to read reviews
on the nutritional value of purple fruit.

Doesn't that sound a little off? Imagining a Paleolithic woman relying on anything other than her internal knowledge, her gut instincts, to determine the best way to feed her child seems ludicrous. Whether choosing which berry to feed her child 3,000 years ago or which brand of laundry detergent to buy when starting a family just 50 years ago, women have made those decisions intuitively, drawing on layers upon layers of unarticulated but deeply internalized information. But modern woman is a completely different animal. Today's woman has a hard time choosing a brunch spot or buying a new bedding set without consulting with a seemingly endless supply of input and opinions. From the experience of a close friend to the guidance of Martha and her many counterparts and even SuperMom98's post on Yelp, it seems the person we feel least comfortable relying on for input is often ourselves.

We here at *Frank About Women* took it upon ourselves to trace the evolution of the female gut instinct. From the dawn of time to the rise of technology and the modern day, we will take you on the journey that is women's decision-making. But at *Frank About Women*, we don't stop there. Wanting to fully understand every aspect of marketing to women, we performed a social experiment where we deprived prescreened "Socially Savvy Shoppers" of their smartphones and Internet connections for one week and watched the drama unfold. As Angela from California put it, "I'm really beginning to wonder if this dependence I have on my iPhone is healthy." Well, Angela, so are we.

How Not To Be Eaten

For prehistoric woman, gut instincts were necessary for survival. From an evolutionary perspective, she developed this set of intuitive responses to the happenings in her environment simply to stay alive.

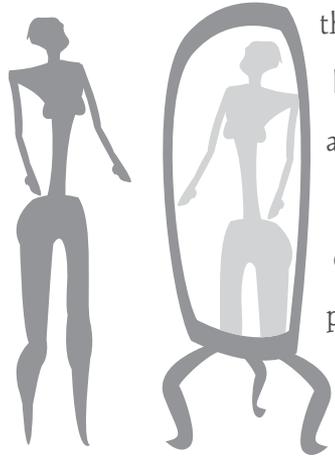
The time it takes to walk through thoughtful decision-making processes could be the difference between becoming the main ingredient in a saber-toothed tiger sandwich or dodging for safety under a nearby boulder. By relying on her past experiences to inform her immediate decisions, prehistoric woman was able to see another day.

In even more recent history – think the 1800s or the early 1970s – gut instincts still comprised the main source of information for our daily decisions. Without ready access to the opinions and input of others, she still relied on her internalized source of knowledge to decide what brand of toilet paper to buy or whether to use canned or frozen veggies in her casserole. Her decisions were based largely on the habits and traditions of her mother, grandmothers and aunts, as well as her own experiences or those of her close friends.

The people she trusted the most, besides herself, were those people she knew well and who knew her well.

You could imagine that a typical shopping trip with a girlfriend would look much the same as it does today: two women consulting each other over the cuts of blouses, the construction of a purse and whether to go with periwinkle or cornflower blue.

But take the girlfriend out of the picture. With no iPhone to consult the masses (and no knowledge of such technology), a pre-smartphone woman would actually rely on her reflection in the dressing room mirror to choose a blouse, test a purse's quality by its heft and material, and maybe ask a nice salesgirl to weigh in on the periwinkle/cornflower debate. If she got her purchases home and didn't love the blouse after all, she could always return it. Ultimately, she would leave the shopping trip self-assured and secure in her decisions. Why wouldn't she? She hasn't been exposed to the literally millions of opinions, critiques, comments and quips the social Internet will offer up to her future self in a few short decades.



Our Best Frenemy Forever

The Gutenberg printing press. The carrier pigeon. The telegraph. The telephone. What do these four technologies have in common? They all have contributed significantly (or not so significantly, in the case of the pigeon) to expediting the process and expanding the reach of human communication. But nothing has shaped the world like the Internet. Before we can discuss the modern woman's gut instinct, it is imperative

to place some context around the social technologies that are shaping our lives and the world way beyond the realm of purchase decisions.

When the personal computer and the public Internet collided in the mass market in the early 1990s, our lives changed forever. At our fingertips, limited only by our dial-up connection and average key-strokes per minute, was access to more information than previously imagined.



One hit of the Internet and we were hooked. Since then, the pace of evolution in social technologies has only skyrocketed.

The Internet itself is a relatively new invention, and yet it has transformed nearly every aspect of our daily lives.

And technologies that help us infuse the Internet even more deeply into our lives are taking over at breakneck speed. For example, while the telephone itself took 39 years to reach maturity, the smartphone achieved the same level of penetration in less than four years.¹ Likewise, while Facebook remains the behemoth of social media (at least for today), relative newcomer Pinterest is breaking records every day – its number of unique visitors doubled from January 2012 (a meager 2B monthly

uniques) to 4B monthly uniques by March 2012,² reaching these levels of visitors faster than any other major social media network.³

As these social technologies continue to grow, in many ways we are seeing their positive influence on our lives and our world. On a global scale, we feel informed and empowered to tackle massive issues of social justice and human rights near and far. The Arab Spring was largely a result of social media's ability to spread information far and fast.

On a more intimate level, millions of Americans have leveraged resources like LinkedIn and Match.com for unprecedented opportunities to advance their personal and professional lives.

Companies are even getting in on the game, using social media to augment customers' experiences.

For example, KLM airline used FourSquare and Twitter to identify passengers waiting to board their flights, leveraging social media to get to know those passengers on a one-to-one level. Using the information the passengers shared on their social networks, KLM was able to surprise passengers with personalized gifts and greetings upon boarding. Sometimes it's just the little things that social technologies enable that really make a difference in our day.

But like any serious relationship, life with social technologies has its challenges. Studies have shown that constant

access to social media can make us feel bad about ourselves when our lives don't measure up to the images portrayed by others.⁴ Yet on the other hand, not having access to social technologies can cause serious separation anxiety, with more than half of adults admitting that they'd feel "worried or uncomfortable" if they couldn't log on to Facebook or email.⁵ Women have a particularly complex relationship with social technologies. On the one hand, social media has the power to make us feel more connected to those we care about and even encourage more social interaction offline.⁶

On the other hand, we experience 40% more distress than men when these technologies allow work to interrupt our family life.⁷

These tensions were fully borne out in our research, both qualitatively and quantitatively. And while we initially set out to learn about how purchasing decisions are changing, we uncovered some powerful truths about how social technologies are changing our very sense of independence, the scope of our lives and the depths of our relationships.



The Rise of the Seventh Sense

This constant access to the social Internet, most significantly through our smartphones, is shaping our gut instinct and evolving it beyond the realm of decision-making. Where we go for advice and whom we trust to give it to us are changing to reflect this democratization of information.

Regardless of the decision, trust is a precious commodity. Historically, we have looked to family and friends or experts, like a doctor or lawyer, for advice we can count on. However, social technologies – and the virtually limitless stock of information they supply – are prompting us to gather advice well beyond those traditional sources. If we self-diagnose on WebMD, a rash only warrants a trip to the doctor if a prescription



solution is deemed necessary.

Nearly 15.5 million people a month are now relying on a substantial portion of user-generated content the site provides.⁸

Similarly, any major purchase decision, from electronics to car insurance, is crowdsourced from Amazon reviews and polling our friends on Facebook. In our study we found that in three out of four categories, user reviews were the most trusted source. The only exception was in fashion, where friends and family came in first, followed closely by user reviews. We also found the top two reasons that we crowdsource our decisions are to get trusted guidance and to justify a splurge.

The implications of crowdsourcing a purchase decision extend beyond the actual purchase itself. With the social Internet packed with opinions, we're beginning to redefine who the experts actually are. A recent Levi's study on millennial women found that young women "are increasingly turning to each other for support" while rejecting traditional mentors (older or more experienced professionals) for "being out of touch with the challenges and experiences" these young women find themselves facing.⁹ At *Frank About Women*, we're calling this trend

"The Fall of the Expert; the Rise of the Frexpert." A frexpert is someone who is in the know yet relatable, knowledgeable and accessible.

Often these frexperts are self-identified category experts who make a name for themselves and gain our trust on message boards and blogs that amass numerous cult followers. Frexperts can be just about anyone. It's in determining which ones we can trust that our new gut instinct comes into play.

Taken as a whole, then, it appears that we women are evolving what might be called a "Seventh Sense" – a form of gut

instinct or women's intuition that's fully informed by the social technologies we draw upon. With unprecedented access to large amounts of information to help us in every step of the decision-making process, the places we are turning to for advice, reviews and opinions vary greatly in terms of the source of the data and its quality. Rather than relying on our gut instinct in the split second of decision-making, we're now using it to filter out information we consider unreliable and choose who we identify as frexperts during the research phase of decision-making. So we set out to better understand the changing nature of whom we trust, for which purchase occasions and why.



We Took the Tech Away

To learn more about their decision and technology processes, we conducted an experiment with a dozen women across the United States, all prescreened as “Socially Savvy Shoppers.” These ladies are attached to their smartphones – often literally, as they’re close to them at even their most intimate moments – and deeply engaged with technology and social media. And the only thing they seem to love as much as those social technologies is shopping.

Whether it’s health and beauty purchases, travel or fashion, these women have a passion for purchasing. In fact, recent data from MRI’s Fall 2012 Doublebase study shows that women who regularly access the Internet from their smartphones not only earn more than their non-Internet counterparts (\$108K household income versus \$95K) but also spend more of that disposable income on items such as clothing, travel and health care products.¹⁰

It’s stats like these that caused us to wonder: Does higher social media engagement equate to higher discretionary spending? We think the answer is yes. But to prove it, we had to do a little digging.

To really understand these women, we engaged in a three-prong process. First, we invited them to share their confessions with us via a creative journal in which they not only logged their technology usage but also gave us an up-close-and-personal view into their shopping style, their techno-relationships and the emotions that lie at the heart of it all.

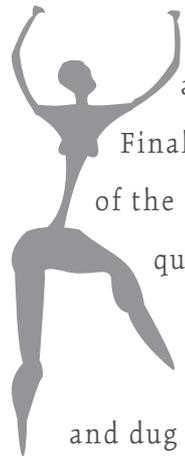
Second, we conducted a virtual chat with them over the course of two weeks. In the first week, we focused on

getting to know them in their natural habitat – allowing them to take part in all the technologies and social shopping that their hearts desired and digging into the needs behind the needs that motivated such behaviors. In the second week, we channeled our mustachioed, diabolical side by replacing their beloved smartphones with basic flip feature phones and prohibiting them from accessing any social technologies, even the Internet itself, with the



exception of our virtual chat. Oh, there was great wailing and gnashing of teeth – for these women, even five days without access to their social technologies seemed too much to bear at times.

Thankfully, the sometimes painful process produced invaluable learnings, both for us ladies at *Frank About Women* and for our Socially Savvy Shoppers themselves.



Finally, to get a better understanding of some of the fascinating insights that emerged qualitatively, we pressure-tested them with 1,000 more social shoppers nationwide.

We explored social shopping generally and dug deep into four compelling categories – health

and beauty, fashion, travel and local leisure. In our journey to understand how women’s mental processes, values, behaviors and even our intuitions are evolving alongside the emergence of what we call “social technologies” – technologies we use to feel connected, whether it’s a smartphone, a social media platform or even online user reviews – we found a common thread tying every experience together: a driving need for reassurance and validation. The expected trends emerged, of course: our love/hate relationship with constant connectivity, for one, and the idea that despite having hundreds of online connections, the relationships themselves are often shallow and unfulfilling.



This Just In:

MASS ADDICTION PLAGUES THE NATION

Connectivity Devices Are the Drug of Choice

The love/hate relationship we all have with our connected lifestyles is not new news. Ever since the invention of the beeper, we've contemplated hurling our respective communication devices into lakes or out of car windows to cease the incessant beeping, chirping and ringing of somebody, somewhere, trying to get in touch. But our study was able to reveal the extent to which this constant connectivity affects our daily lives. There is the argument

for connectivity: unparalleled access to deals, consumer reviews, crowdsourcing and peer connections enables us to (theoretically) become more efficient shoppers. If I make a purchase that is verified by a five-star status on Amazon, vouched for by three friends on my Facebook wall and 15 percent off with my mobile coupon, then I have no doubt that I made a great buy. But if you take the smartphone away, the ultimate portal to all those means of purchase insurance, the cons of connectivity are quickly revealed. First and foremost, access to all that information results in dependency. Annie from Colorado had a massive revelation when we took her connectivity away: "It took me a while to remember that I could just ask someone for directions. Ha, imagine that – verbal communication!" After spending five days disconnected, Debbie S. of New York told us, "Maybe this is another thing I did not anticipate, how little power I would have against the conveniences of the phone and the Internet." In most cases, we don't realize how much we actually use our phones.

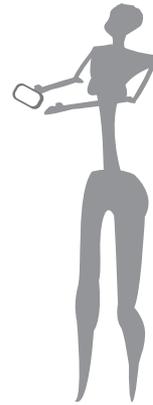
Not having to ask for directions might make us feel independent (when we can simply consult Google Maps), but take that crutch away and we quickly come to realize (and maybe resent) the fact that we aren't as self-sufficient as we like to think we are.



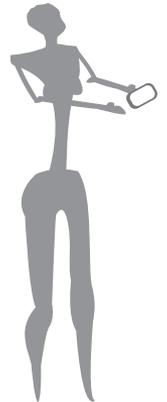
I Need Somebody With the Human Touch: Conversation Versus Connection in the Digital Space

Beyond affecting our sense of self, being perpetually plugged in to social technology drastically morphs how we cultivate and maintain relationships. It's inarguable that technology has become a major foundation of our personal connections. By giving us simpler ways to connect, social technology breaks down the barriers to communication. In the same way that the telephone's convenience usurped the handwritten letter, we now find text messages taking the place of phone calls. Yes, the ease and convenience of that instant communication does make our

connections more immediate and therefore, more plentiful. But it's in that very same simplicity that makes the text so great that we lose the majority of the richness that comes from a voice on the other end of the line. Combine that absence of voice with



the fact that we're often carrying on multiple text conversations at once, and what you're left with is a watered-down version of human contact. Now we're seeing more and more that, despite all the connections we have, very few of them are fulfilling and satisfying because we have sacrificed conversation for mere connection. Some people, like Angela from California, accept that this is just the way it is:



"I totally rely on social networking for maintaining relationships. I rarely ever make phone calls for talking to friends and family. It's kind of sad, but it's 2012." Others have a sense of nostalgia, like Annie from Colorado, who realized after some time apart from her smartphone that, "I communicate via text messages way too often! I miss the human connection that comes with simple phone conversation." Adrienne from Texas really sums it up in her diary entry where she writes, "Technology

makes connecting easier, but it's still up to you to make sure you stay invested and engaged in those relationships." We couldn't have said it better ourselves.

But ultimately what our study revealed was the correlation between constant social connection and a desire for external reassurance and validation. **With our social network there to guide our decision-making processes, we no longer have confidence in our ability to do it on our own.** Of course, we can make a purchase on our own, but how do we know it's the right one? How do we know we got the best deal out there? Could we have found a comparable brand in quality for a lower price? And if we didn't get the best deal, are we still smart shoppers? And if we aren't smart shoppers, what does that say about us as people? As women? As mothers? Because if we're being wasteful with our resources, namely our time and money, then are we really doing what's best for our families? And if we aren't doing what's best for our families, what good are we?

Wow, that was exhausting! To avoid this mental tangle of

self-doubt, we turn to user reviews, deal aggregators and our news feed to gain reassurance. And if we are to venture out on our own, say by trying a new recipe or testing different mascara, we often feel a need to share a picture or post a status about our adventure. Whether to share successes or to lament failures, this postevent summary often feels like a request for feedback in the form of validation from our friends and frexperts. A near-high comes from a simple comment like, "Wow, that skinny girl enchilada recipe looks delish! Recipe, please?", providing just the little boost of reassurance that keeps us posting and coming back for more. The afterglow of social acceptance results in a powerful drive to share more. And those who share are also commenting on the posts of other sharers, both to share their opinions and to connect with more women like them to garner more responses to their own posts. The resulting demographic is the ladies we're calling Socially Savvy Shoppers who have a powerful drive to share, review and share again.

What This Means for Marketers:

AKA Pay Attention to This Part

From everything we've seen in our research, in the statistics and in our own daily experiences, social is here to stay. Though things like "Facebook fasts" have been circulating on the Internet recently (where users take extended breaks from logging on to the social network as a pseudo life-cleanse), the fact is that social technologies do have a place in our lives. Sometimes we need a little help balancing our virtual social lives with our real-life ones, but we can ultimately benefit from social technologies by becoming smarter, more informed shoppers. Plus, it's fun!

For marketers, social technology can be one of our biggest allies. The dependency that social technology breeds gives us the perfect "in" to gain access to the ideal consumer: the Socially Savvy Shopper. By harnessing her drive to share, her spending power and her perceived need for external validation, we can activate powerful brand advocates who influence others well beyond the social space. We know that the Socially Savvies are sharing their postpurchase experiences and the products they buy across social networks. In fact, **55% of consumers regularly share their purchases socially,** creating plenty of opportunities to identify reviewers and take action on their advocacy.

We also know that these women have a higher propensity to spend their extra income. Not only are they spending more but also their purchases are heavily influenced by the use of smartphones during their shopping trips. It's been shown that 39% of instances where a customer has walked out of a store without buying were actually influenced by smartphones.¹² However, Socially Savvies who received excellent customer service from brands spend on average 21% more than their nonsocial counterparts.¹³ So how do we take advantage of a shopper's smartphone not only to keep her in-store but also to get her to spend more? One of the most obvious ways is to hit her with

mobile coupons. The majority of customers interact with brands on social networks either for product discounts or rewards programs, so serving her up a mobile coupon not only entices her to stay in-store but also can encourage her to spend even more. And finally, we know that social networking conditions our Socially Savvies to believe that they need reassurance and validation when they do make a purchase. As marketers, we can use the social Internet to stroke her ego and reassure her that our brand was the best option by minimizing the purchase risk and reaffirming her decision online. Examples of tactics that work well in this space are offering hassle-free returns, price-matching in-store or the price-protection programs that certain credit card companies have. It's also important to continue to nurture her in the postpurchase social space. We find it shocking that, on average, companies respond to only 30% of fan social feedback.¹⁴ In our gut instincts survey, we found that women were most likely to trust a brand's online presence when there is a sense of responsiveness to customer concerns online and when honest customer feedback is fostered or encouraged. We can make her dollar work harder for us by quickly responding to any complaints she might have, making an effort to celebrate her positive posts and continuing to offer her relevant content on our own pages.

So, if you're skimming the paper and plan only on reading the last paragraph (hey, we know you're busy; we don't take it

personally), the moral of the story is this: Gut instincts are evolving from the knee-jerk reactions that we rely on for instantaneous decision-making to more of a seventh sense that we use to inform us of source reliability when researching potential purchases. The women who are champions of the seventh sense are Socially Savvy Shoppers. These are the women who, in the purest form of the definition, frequently use their smartphones to connect to the social Internet. Basically, the smartphone is an extension of their hand and is something they are rarely seen without. Through a study we executed at *Frank About Women*, in which we deprived these women of their precious smartphones, we found that Socially Savvy Shoppers are the ideal consumer. Not only are they spending more, but the dollars they spend are heavily influenced by the opinions of others within their social networks. Beyond sharing their own purchases, they evaluate and give feedback on the purchases of others to reaffirm their decisions and hopefully elicit responses to their own postings. What ultimately results is a driving desire for validation and affirmation that can really only be achieved via the massive reach of the social Internet. As brands, we absolutely must activate these women in their own environments, catering to them before and during the purchase process and nurturing them into becoming advocates in the postpurchase phase.

¹ <http://www.technologyreview.com/news/427787/are-smart-phones-spreading-faster-than-any/2/>

² <http://www.forbes.com/sites/marketshare/2012/02/15/the-rise-and-rise-of-pinterest-and-our-love-of-digital-curation/>

³ http://www.huffingtonpost.com/2012/03/12/pinterest-use_n_1339687.html

⁴⁻⁵ <http://www.mediapost.com/publications/article/179092/social-media-can-cause-anxiety.html?print#ixzz22mQNuKs1>

⁶ <http://adage.com/article/guest-columnists/women-find-social-media-makes-social-offline/235712/>

⁷ <http://www.cnn.com/2011/HEALTH/03/08/women.guilt.work/index.html>

⁸ <http://www.quantcast.com/webmd.com>

⁹ Levi's Millennial Woman Study

¹⁰ MRI Spring 2012 Doublebase

¹¹⁻¹⁴ <http://thesocialskinny.com/100-social-media-mobile-and-internet-statistics-for-2012/>

How do we do this? Well, that's what our study was all about. We tested our theories in four different categories: fashion, travel, health and beauty, and leisure. If you want to see the results of our study specific to your brand category, please don't hesitate to reach out to Frank About Women's **Shaun Stripling** at **SStripling@mullen.com** or **336-774-9397**.

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