



Digital Women
Influencers Study:
**The Power of
the PANK[®]**
Engaging New
Digital Influencers



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Introduction

An increasingly competitive marketplace requires identification of new opportunities. Companies gain unique advantages over competitors when they tap into market segments that are overlooked or underserved. Or they find new ways of engaging with segments they've been marketing to for years. As a global communications firm dedicated to bringing new and unique ideas to its clients, Weber Shandwick partnered with KRC Research to conduct **Digital Women Influencers**, a large-scale online survey of 2,000 North American women, to identify segments who not only have gone unnoticed by marketing and communications professionals, but who are influential in their own right. These under-recognized groups of women, if engaged appropriately, have considerable power to move markets.

Marketers have long recognized the powerful segment of moms – new products are developed with moms in mind, PR and advertising campaigns are created for them and new niches of moms are regularly identified (remember the advent of “soccer moms?”). No one argues that moms are not a segment worth investing in – more than 83 million moms represent \$2.7 trillion in annual spending in the U.S., according to Maria Bailey, author of “Marketing to Moms: Getting Your Share of the Trillion Dollar Market.” They are also fairly easy for marketers to target, particularly as they are highly likely to use social media. eMarketer research shows that by the end of 2012, nearly 28 million moms will use social networks, representing 82% of mom Internet users who have children under 18 in their households.

However, moms are not the only women who spend money. Nor are they the only women to influence purchasing decisions or master the Internet. Increasingly, we hear from clients that they are looking to enhance and expand their female target portfolios. Moms remain critical to their strategies, but they are looking for other ways of defining women that may not be motherhood-based. The focus of our research was to identify new segments of women, regardless of their mom status, to help determine how marketers and communicators can reach them, and to build an engagement profile to maximize their potential.

First Stop: PANKs

Weber Shandwick was introduced to an influential and under-recognized segment of women dubbed “PANKs,” or Professional Aunts No Kids, by Melanie Notkin, founder of Savvy Auntie®, the multiplatform lifestyle brand she designed for this powerful segment. When Melanie first became an aunt in 2001, she found herself concerned by the lack of resources for women like her, and she also saw market opportunity. Melanie, as a marketer by trade, understood that PANKs are an under-leveraged – and overlooked – segment, recognizing that modern and savvy aunts invest their discretionary time and money where their heart is.

We teamed up with Melanie, the national authority on this segment, to more deeply explore PANKs and quantitatively address the business opportunity they present. As the name implies, this group of women does not have any children. However, they are much more than just women without kids – they are women 18 or over who have a bond with a child, regardless of their familial relationship or geographic proximity and regardless of whether they are voluntarily or involuntarily childless themselves. They could be aunts, godmothers, cousins, neighbors, or moms’ friends. What makes them a PANK is the strength of their relationship with their nieces, nephews, godchildren, friends’ children – any child not-their-own.

“While parents are stretched to their limits, PANKs are able – and happy – to offer support to the children in their lives in meaningful ways. They may be secondary caregivers, but with their emotional, financial and material gifts – not to mention their quality time and positive influence – PANKs play a primary role in the vitality of the American Family Village.”

Melanie Notkin, CEO,
SavvyAuntie.com Inc

As we dove into our research results, we realized that this particular segment of childless women is a highly appealing demographic for marketers. PANKs play a financially meaningful role in the lives of other people’s kids, are active on social media, and influence the purchasing decisions of others, including moms. PANKs are highly influential in the marketplace and ought to receive greater recognition.

“In 1976, 90% of women by their early 40’s had given birth versus only 82% today. For marketers this means there may be fewer moms to target but more aunts, grandmothers and close friends, who incidentally, as we all realize, tend to have higher incomes than those of us raising kids, so not necessarily a bad thing.”

Maryanne Conlin
MediaPost.com, June 15, 2011

This report delves deeply into PANKs. It provides marketers and communicators with proof of PANKs’ value and outlines ways to successfully engage them. Additional segments of influential women will be released by Weber Shandwick in early 2013.

Missed Opportunity

In 2011, North American advertising and public relations trade and industry publications and blogs mentioned moms, mothers, or mommies in 569 articles. Aunts were covered in the same media over the same time period just seven times.¹ It is not surprising then that our study found that significantly more PANKs than moms agree with the statement, “Most advertising and marketing is not geared towards women like me” (43% vs. 36%, respectively). And it’s not just sales messages that aren’t geared to PANKs, it’s a feeling of being sidelined by society – exactly half of all PANKs believe that society in general overlooks women who don’t have children.

- ▶ **Why should companies care about PANKs?**
- ▶ **How should marketers and communicators maximize the PANKs opportunity?**

Weber Shandwick has identified 14 Principles of PANKs – compelling reasons why PANKs are integral to any consumer segment-driven marketing plan – and The PANK Engagement Guide to inspire the PANK strategies of marketers and communicators.

¹ Source: Factiva search conducted 9/14/12

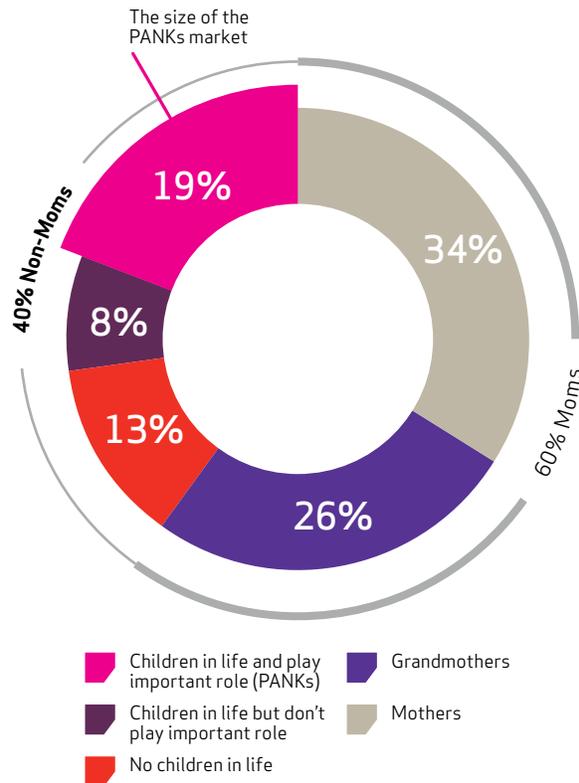
The 14 Principles of PANKs

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The 14 Principles of PANKs

1. PANKs are a sizable segment of the population

One in five women is a PANK, according to our study. This represents approximately 23 million Americans, a population size comparable to Black/African American adults (28 million)² and a segment larger than other highly sought-after niche markets, such as the LGBT market, estimated to be 16 million. PANKs are roughly half of all women who aren't a mother or grandmother.



2. PANKs are an attractive lifestyle demographic

PANKs have a higher rate of full-time employment than the average woman and an annual household income that matches that of the average woman. These facts are impressive since PANKs are more than twice as likely as other women to be single. It means that PANKs don't have to stretch their income among as many people.

² 2010 U.S. Census.

“Move over soccer moms. There’s a new group of smart, powerful women spenders out there. PANKs have time, income and a passion for purchasing for the kids in their lives. It’s a perfect marketing trifecta. The marketing world has long and rightfully focused its resources on moms. Our deep dive into social networks has revealed vibrant communities of women who aren’t moms. They are groups – like PANKs – that are well worth a marketer’s attention.”

Leslie Gaines-Ross, Chief Reputation Strategist,
Weber Shandwick

This household and income profile points to discretionary income as a compelling differentiator from other women.

Additionally, PANKs are younger. The average age of a PANK is 36 (vs. 46 years for overall women), a highly desirable age cohort for marketers because it suggests that PANKs potentially have a network of friends and family members with growing families.

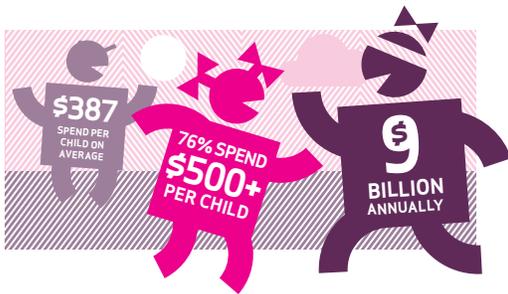
	TOTAL WOMEN %	PANKS %
Employed, working full-time	26	34
Annual household income \$50K or higher	37	34
Single, never married	25	52

Bold = statistically higher than other group

The 14 Principles of PANKs

3. PANKs spend money on kids and assist kids' parents financially

PANKs estimate that they spent an average of \$387 on each child in their lives during the past year, with 76% having spent more than \$500 per child. This translates to an annual PANK buying power estimate averaging roughly \$9 billion.



PANKs also offer economic assistance by providing kids with things kids' parents cannot or will not offer them. Many have given gifts to parents to help them provide for their kids (45%) and often buy things for kids that parents won't buy them (43%).

A surprisingly large number (34%) even expect to help pay for a child's education. With more than six in 10 PANKs (62%) reporting that they do not feel understood by their financial services companies, there may be opportunity for banks and investment services to build a better rapport based on the needs of PANKs and their interests in the kids in their lives, starting with an educational savings program.

PANKs are also indulgent, with one-third (33%) giving the kids in their lives more expensive gifts than others give them. This is in spite of PANKs' cautious spending habits, as most (75%) say they are more careful with how they spend money since the economic crisis, demonstrating that they are willing to make sacrifices for the kids in their lives.

PANKs are more racially diverse than other women – 40% are non-Caucasian vs. 32% of overall women

4. PANKs wield influence over both kids and kids' parents

Kids look up to their PANKs. Nearly seven in 10 PANKs (68%) report to be a role model for the kids in their lives and many kids, as well as kids' parents, go to PANKs for fashion and trend advice (36%). More than four in 10 (43%) say they have influenced the purchase decision of kids' parents and more than one-third of PANKs (35%) offer kids things that their parents cannot, which may be financial, emotional, friendship or some other type of support.

To what extent do you agree with each of the following statements? (rated 7, 8, 9, 10 on 10-point scale)

68%

The child(ren) in my life view me as a role model

64%

I enjoy being able to spend time with the child(ren) in my life, but I'm glad I'm not a parent

52%

I spoil the child(ren) in my life

48%

I enjoy traveling with the child(ren) in my life

45%

I have given gifts to parent(s) of the child(ren) in my life to help them in providing for their kids

43%

I often buy the child(ren) in my life things their parents won't buy them

43%

I have influenced purchase decisions made by the parent(s) of the child(ren) in my life

36%

The child(ren) in my life, or their parents, come to me for fashion and trend advice

35%

I offer the child(ren) in my life things their parent(s) cannot offer them

34%

I will likely help pay for the education of the child(ren) in my life

33%

The child(ren) in my life get more expensive gifts from me than from other people

The 14 Principles of PANKs

5. PANKs are happy in their role as PANKs

Nearly two-thirds of PANKs (64%) report that they enjoy spending time with the kids in their lives but are glad they are not parents themselves. This is not to say they don't expect or want to be moms one day – 56% are under 35 years old – but they are quite comfortable with their role today. In fact, PANKs are very active with the kids in their lives, with many reporting they spoil these kids (52%), take a lot of photos/videos of them (53%), share these photos/video online (46%), and enjoy traveling with them (48%). One-third (34%) say they even enjoy running errands for children, such as for sports, school, doctors, etc.

Most importantly, PANKs are just as satisfied with their lives as women in general (61% vs. 62%, respectively). Marketers should not shy away from targeting PANKs to avoid perceived insensitivity risks regarding a woman's non-mom status. These women are proud to be PANKs and, as noted earlier, recognize that they tend to be overlooked in advertising.

6. PANKs are well-connected (and connect well)

PANKs have, on average, 15 close friends (the average woman has 16 close friends). They report that their circle of close friends is a very diverse group in terms of age, income and lifestyle. While PANKs are no more likely to be on social media than the average woman, they do have more accounts and nearly 200 more connections – driven by Facebook friends and YouTube channel subscribers – and spend slightly more time per week using social networks (13.4 hours vs. 12.1 hours, respectively). They are also significantly more likely to enjoy using social media than the average woman does (59% vs. 51%).

	TOTAL WOMEN	PANKS	TOTAL WOMEN	PANKS
	SOCIAL MEDIA ACCOUNTS/PROFILES		SOCIAL NETWORK CONNECTIONS	
	%	%	Avg. #	Avg. #
Facebook	81	84	256	485
YouTube	35	50	319	530
Twitter	28	39	397	333
Google+	22	30	98	45
LinkedIn	18	18	59	72
Pinterest	17	22	66	52
Instagram	9	19	171	156
Blogs	8	14	229	111
Other site	7	8	n/a	n/a
None	14	10	n/a	n/a
Average #	2.2	2.8	1,595	1,784

Bold = statistically higher than other group

PANKs use social media to stay connected to the kids in their lives. More than half are frequently in contact with the kids in their lives through online technologies (52%) and say that social media helps them do so (45%).

The 14 Principles of PANKs

7. PANKs are avid info-sharers

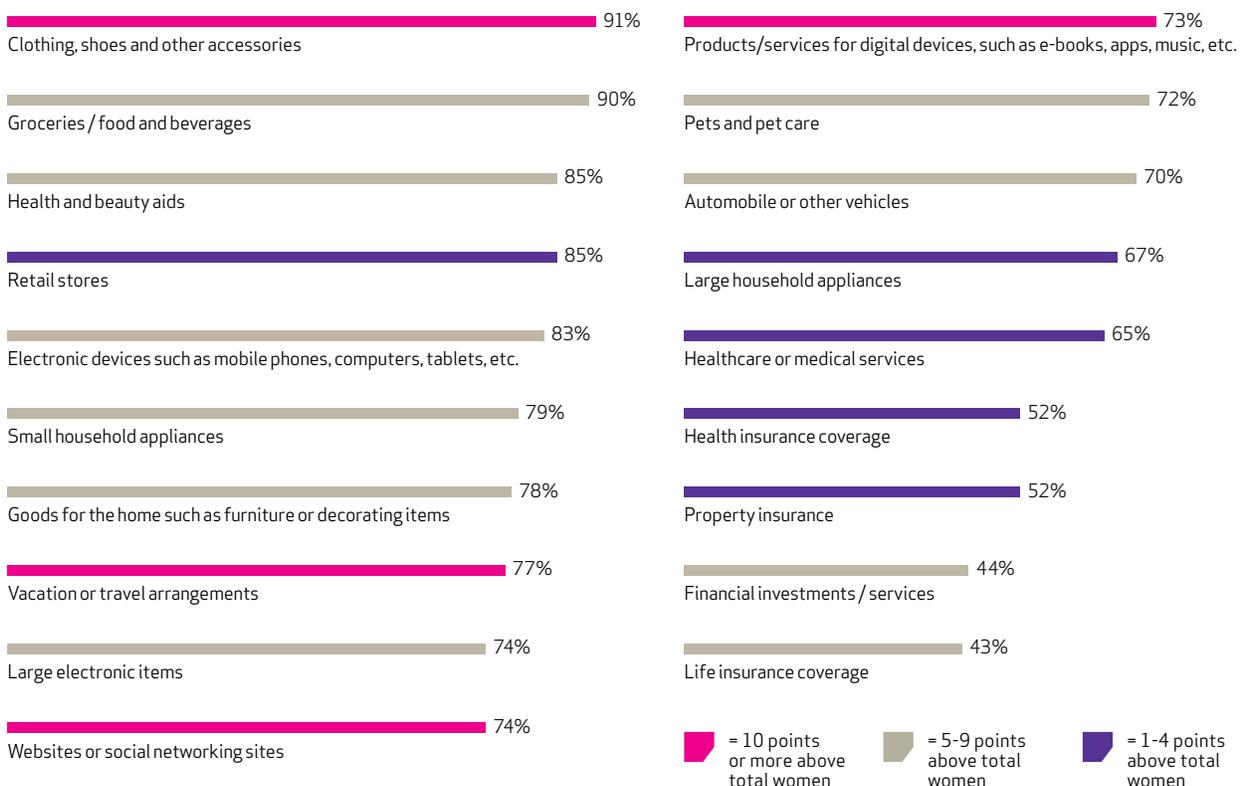
PANKs are sharing information on a wide range of products and services. We presented 19 categories of goods and services to the women in our survey and asked them to tell us if they share information about these categories with others. Our findings were rather startling: for every category, PANKs are as likely or more likely to share information about the category as overall women. There is no category that they are less likely than overall women to share information about.

PANKs are exceptionally good sharers of information about clothing, vacation/travel, websites/social networks sites, and products for digital devices but also index higher on traditionally “mom” categories, such as groceries/food and beverages, household appliances and home decorating goods.

PANKs are also pretty savvy when it comes to what may be considered more male-dominated areas of expertise: electronics, automobiles/other vehicles, life and property insurance, and financial investments/services. PANKs surpass the average woman on sharing information about these categories.

79% of PANKs believe that women can simultaneously have a successful career and family

Do you typically share information about the following kinds of products or services with others? (Among PANKs)

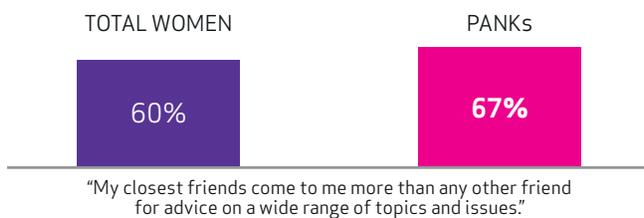


The 14 Principles of PANKs

8. PANKs are decision-influencers

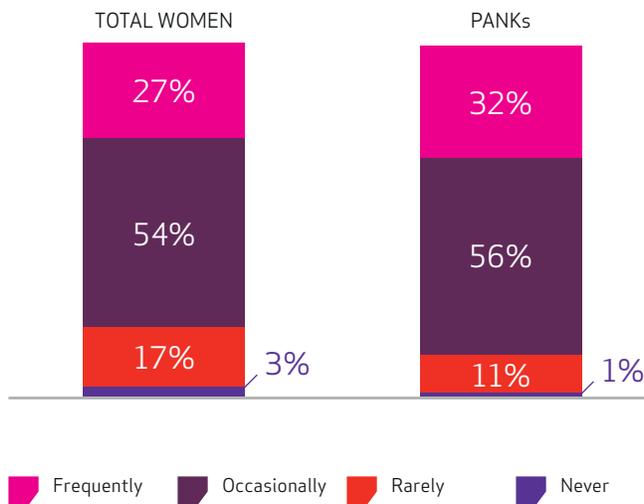
Approximately two-thirds of PANKs (67%) are sought out by their friends more than any other friend for advice on a wide range of topics, significantly higher than overall women (60%). PANKs are also more likely to be consulted for their opinions by others regarding purchasing decisions.

To what extent do you agree with the following statement?
(rated 7, 8, 9, 10 on 10-point scale)



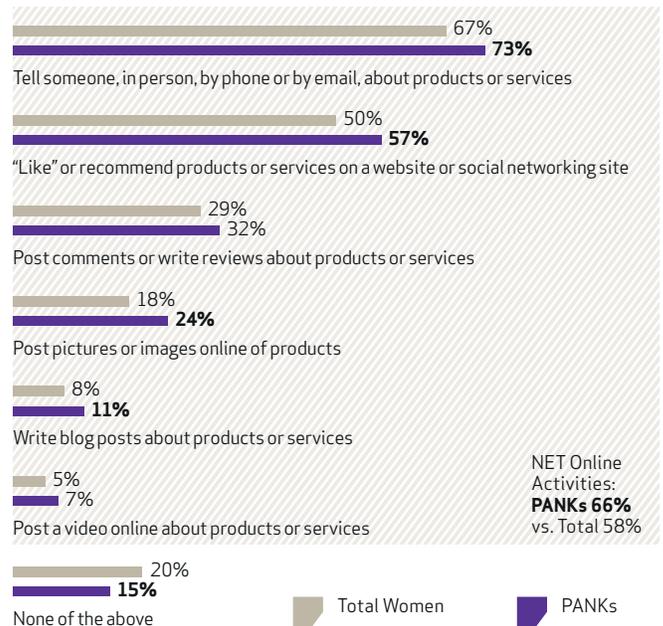
Bold = statistically higher than other group

How often do other people ask for your opinion when they are making a decision to buy a product?



In fact, during the course of an average month, PANKs are significantly more likely than overall women to provide information to others, both through social media and more directly (in-person, phone or email).

Thinking about an average month, which of the following do you do?



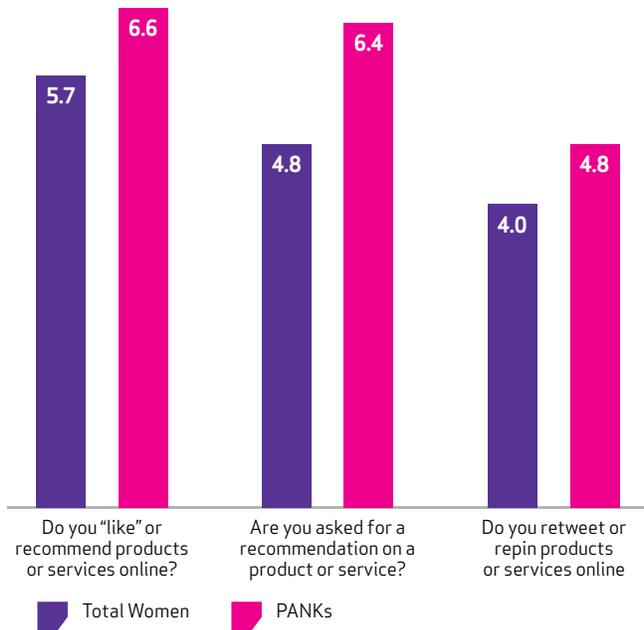
Bold = statistically higher than other group

PANKs are also more frequent sharers than other women. During an average month, they "like" or recommend products/ services online, are asked by others for a recommendation about a product or service, and retweet or repin products or services nearly 18 times in total, on average (vs. 14.5 for average women).

38% of PANKs say, "My co-workers would be surprised to know how much I enjoy working around my home"

The 14 Principles of PANKs

In an average month, how many times...



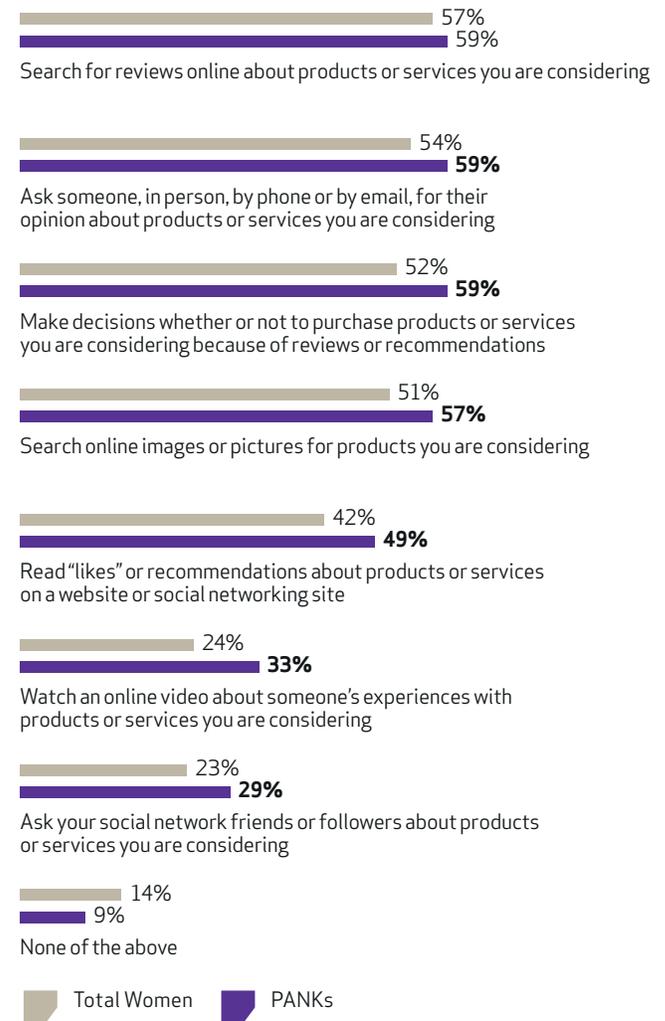
It is clear from our research that sharing information and influencing purchase decisions is not a uniquely mom phenomenon. PANKs, too, are highly influential both online and offline.

9. PANKs are researchers

PANKs don't make decisions without doing their research. Approximately six in 10 PANKs (59%) make purchase decisions based on reviews or recommendations, again at a significantly higher rate than women in general (52%). Four in 10 PANKs say that they prefer doing their own research to find a gift for the kids in their lives rather than asking the kids themselves what they want. These women want their kids to see them as special and will spend the time and money to find the right gift.

How do they amass the information they need for making informed decisions? Again, through a combination of online and offline means. Regardless of the source of information, PANKs are more thorough and investigative than the average woman, as they are significantly more likely to rely upon a variety of sources.

Thinking about an average month, which of the following do you do?



Bold = statistically higher than other group

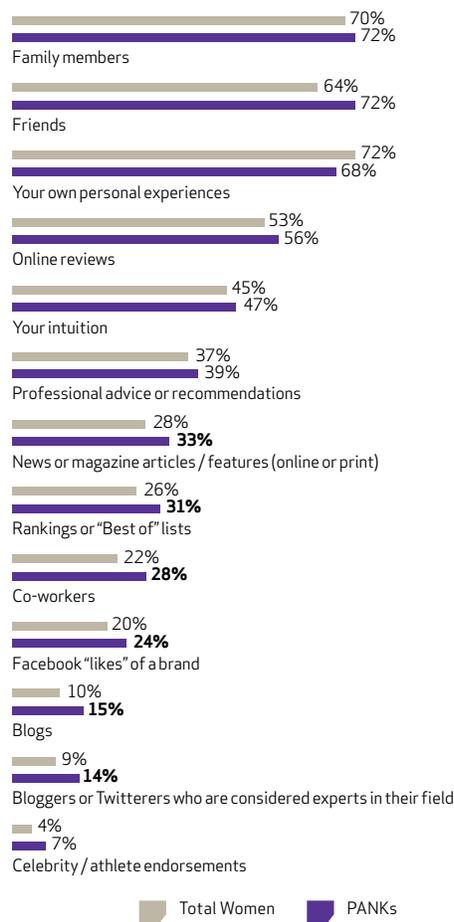
32% of PANKs say their usage of Facebook has increased during the past six months

The 14 Principles of PANKs

10. PANKs are influence-able

PANKs not only influence the buying decisions of others, but they are also receptive to being influenced and their trust in reliable sources extends beyond their immediate circles of friends, family, and coworkers to a greater extent than other women. While advice from people they know is regarded as the most trustworthy, PANKs place their trust in expert or credentialed sources more so than overall women do when it comes to making important purchase decisions. Journalists, “best of” lists, and bloggers all hold more credibility for PANKs than for women in general.

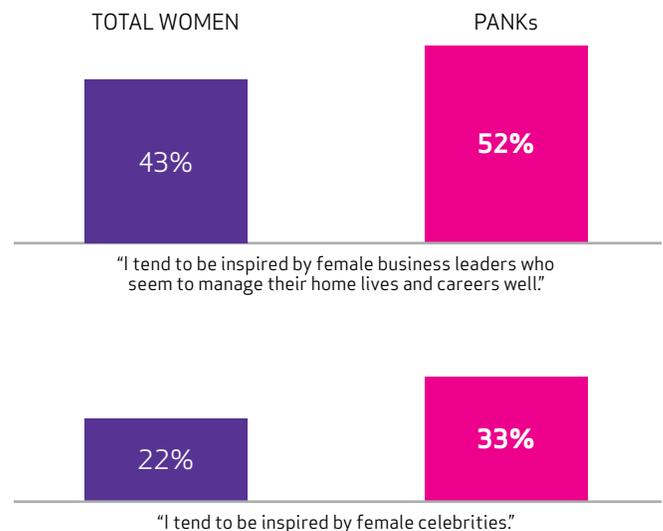
Which of the following do you typically trust the most when you are making an important purchase decision?



Bold = statistically higher than other group

PANKs are also more inspired than the average woman by female “icons” – women business leaders who manage their lives well and women celebrities.

To what extent do you agree with the following statements? (rated 7, 8, 9, 10 on 10-point scale)



Bold = statistically higher than other group

These findings have positive implications for targeting and messaging to PANKs. The segment is more open to trusting media, rankings lists, and personalities, helping inform a marketer’s roadmap for PANK strategies.

The 14 Principles of PANKs

11. PANKs are devoted “nesters” but highly social too

PANKs are just as likely as overall women to enjoy domestic life – spending time at home, cooking, entertaining, yard work, and even housekeeping. They are significantly more likely than the average woman to enjoy home decorating and home improvements. As discussed earlier, most PANKs share information about small household appliances (79%), home goods such as furniture or decorating items (78%), and large electronics such as TVs or home theater equipment (74%).

Perhaps not surprising since PANKs don't have their own kids, PANKs are significantly more likely than overall women to enjoy social activities – hanging out with friends, dating, using social networks, volunteering, and participating in sports. PANKs also enjoy attending religious services as much as the average woman.

How much personal enjoyment do you typically get from doing each of the following? (rated 7, 8, 9, 10 on 10-point scale)

DOMESTIC ACTIVITIES	TOTAL WOMEN %	PANKS %
Spending time at home	86	84
Spending time with family members	83	82
Cooking	69	72
Home decorating / home improvements	66	72
Entertaining others at my home	60	63
Landscaping / gardening	46	44
Housekeeping	43	47
Running errands for children (sports, school, doctors, etc.)	35	34
Average rating	61	62

Bold = statistically higher than other group

PANKs “outsource” an average of 1.8 household chores – usually yard work and handyman activities

SOCIAL / OUTSIDE THE HOME ACTIVITIES	TOTAL WOMEN %	PANKS %
Hanging out with friends or other social activities	71	82
Dating or spending time with partner	65	70
Using social networks, such as Facebook	51	59
Doing community service, charity work or volunteering	48	57
Attending a religious institution such as a church, synagogue, mosque, etc.	44	44
Working at my job or going to school	40	53
Attending work-related social functions	25	34
Participating in organized sports	21	32
Average rating	46	54

Bold = statistically higher than other group

The 14 Principles of PANKs

12. PANKs are receptive to programs that bring them closer to the kids in their lives

Given their “proud to be a PANK” attitude, PANKs are open to ideas we explored in our research that are specifically targeted to making their relationship with the kids in their lives richer, help them better understand the world of children, and reward their role as a PANK.

Below are ideas for programs or services for women who are not parents but have a child or children in their lives. How appealing is each one to you? (rated 7, 8, 9, 10 on 10-point scale)

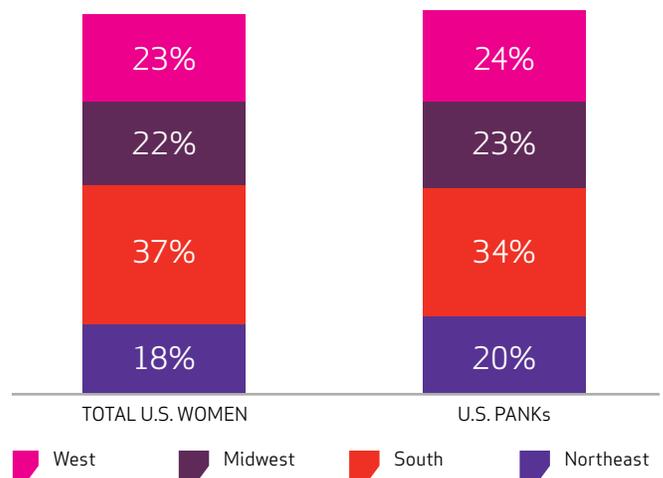


Interestingly, the programs that are digitally-focused – online info, apps, and social network communities – are of the least appeal to PANKs although they are still highly rated by more than one-third of PANKs. We believe this is because PANKs are so digitally-savvy that they don’t need this kind of help; they know where to go and what to do online.

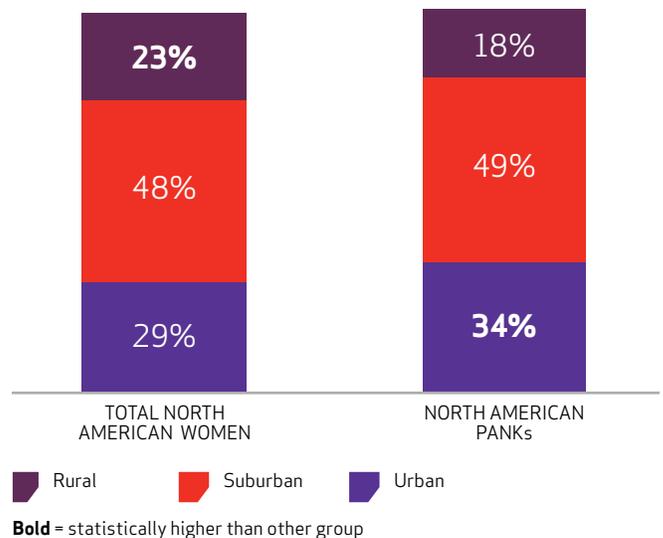
13. PANKs are everywhere

PANKs are not isolated in any particular region of the United States. They are as likely to live in any region as other women are. However, within those regions and Canada, they are significantly more likely than the average woman to live in urban areas. This does not mean they are all urbanites – the bulk of them are suburban and nearly one in five are rural inhabitants.

U.S. geographic distribution



North American population density



The 14 Principles of PANKs

14. PANKs are ahead of the online media consumption curve

Compared to overall women, PANKs watch much less TV on TV sets. However, they consume more online media than the average woman does, with the exception of newspapers, which are read digitally at the same frequency by overall women and PANKs. PANKs are also slightly more likely to spend their time shopping both in stores and online than overall women.

PANKs enjoy doing community service, charity work or volunteer activities more so than the average woman (57% vs. 48%)

In an average week, how many hours do you personally spend doing each of following?

TRADITIONAL ACTIVITIES	TOTAL WOMEN AVG.HRS	PANKS AVG.HRS
Watching TV on a TV set	29.8	17.5
Listening to the radio on a radio	5.9	7.2
Shopping in stores	3.8	4.2
Reading the newspaper in print	3.4	3.2
Total hours per week	42.9	32.1
Average per activity	10.7	8.0

Bold = statistically higher than other group

ONLINE ACTIVITIES	TOTAL WOMEN AVG. HRS	PANKS AVG. HRS
Using social networks	12.1	13.4
Browsing the web	13.2	14.6
Listening to the radio online	6.7	7.1
Shopping online	3.5	3.9
Watching TV online	6.7	7.0
Reading the newspaper online or on an e-reader such as the Nook or Kindle	3.8	3.8
Total hours per week	46.0	49.8
Average per activity	7.7	8.3

Bold = statistically higher than other group

The future of marketing is online. Advertisers and communicators don't need to warm this segment up to digital media – PANKs are already comfortable in the digital space.

The PANK Engagement Guide



The PANK Engagement Guide

“The Power of the PANK: Engaging New Digital Influencers” from Weber Shandwick and Savvy Auntie isolates several meaningful recommendations and opportunities for marketers and PR practitioners looking to engage a new and viable segment of women.

- ▶ **Acknowledge PANKs.** This is a sizable group of women who have spending power, interest in the happiness and wellbeing of kids in their lives, and considerable spending influence on their friends and large online communities. These women are resourceful, information-hungry, digitally and financially savvy, comfortable with not being a parent (yet), and receptive to advice from experts and other influentials. Marketers cannot afford to continue focusing on moms alone. PANKs know they have been overlooked and are more than ready to finally be recognized as a powerful market.
- ▶ **Build a base of PANK advocates** for your company or brand. Assuming that many of these women will become moms one day, secure their loyal following now as part of any moms programs currently underway. Make them feel welcome.
- ▶ **Avoid stereotyping PANKs as non-domestic.** Single women without kids are often characterized by the entertainment world as solely focused on their careers and clumsy with children. Yet PANKs are neither. They enjoy their domestic lives just as much as other women but also enjoy activities outside the home. By definition, they have a solid relationship with a child so presumably can confidently care for a child.
- ▶ **Innovate for PANKs.** Create new or refine existing products, services and programs specifically for PANKs and the kids in their lives. Our research is not exhaustive of all the kinds of products and programs that can succeed when targeting PANKs, but we do see high potential for travel, digital products and apps, apparel, and banking/investment products. No products are off-limits to PANKs – what is good to market to women is good to market to PANKs.
- ▶ **Demonstrate value for the money.** PANKs are willing to spend on their kids but are sensitive to the challenges of a tough economy. Products have value if they help PANKs decide appropriateness of gifts and ultimately enrich the bond PANKs have with kids, such as special travel packages.
- ▶ **Develop online campaigns for PANKs.** PANKs are highly savvy digitally. They are on social media, researching online reviews, searching “likes,” reading blogs, watching videos. They trust online reviews more than they trust their own intuition. Create content especially for social platforms. Their sizable networks increase the potential for their postings to go to viral.
- ▶ **Use experts and female celebrities in campaigns** if the opportunity calls for a spokesperson. PANKs are much more likely than the average woman to rely on expert advice for informing purchase decisions and to be inspired by female celebrities.
- ▶ **Message to their unique relationship with kids.** Don't be concerned that you will insult PANKs by referring to their special position as a non-mom in kids' lives. They are proud of this relationship.
- ▶ **Promote traditional mom categories with a PANKs sensibility.** Groceries, for example, are not the exclusive domain of moms. PANKs influence the purchase of food and beverages, too. There are considerable cross-over opportunities between moms and PANKs in many sectors.
- ▶ **Appeal to PANKs' sense of community purpose.** PANKs are significantly more likely than the average woman to enjoy community service, philanthropic work or volunteer activities. Leverage your company's own corporate social responsibility actions, events and milestones to build your reputation among this important segment. Use both online and offline means for getting your good deeds known to PANKs.

For more information

For more information on **Digital Women Influencers: "The Power of the PANK,"** please contact:

Leslie Gaines-Ross
Chief Reputation Strategist,
Weber Shandwick
lgaines-ross@webershandwick.com

webershandwick.com

Bradley Honan
CEO, KRC Research
bhonan@krcresearch.com

krcresearch.com



Melanie Notkin
CEO, Melanie Notkin Media Inc
& SavvyAuntie.com Inc
sdevall@nstalent.com
melanie@savvyauntie.com

savvyauntie.com
PANKPower.com

