

Women on the Web

How Women are Shaping the Internet



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Women on the Web: How Women are Shaping the Internet

Ten years ago, *USA Today* published an article, based on comScore Media Metrix data, stating that the number of women on the Web in the U.S. had surpassed the number of men. Even at the time, when the U.S. Internet audience was only 75.7 million, it was clear that men and women used the Web differently. Juggling different demands, women used the Internet as a productivity tool, while men were primarily engaged in downloading software, experimenting with new technology and using it as a form of entertainment. Sites with the highest female proportions in their audiences included women and teen magazine sites, health sites and apparel and baby goods retailer sites.

Since then, the global Internet landscape has changed tremendously: the majority of Web users are now in Asia, audiences in Latin America and the Middle East/Africa are growing rapidly and the continuing emergence of new technologies (e.g. flash, broadband, Wi-Fi, 3G mobile) has helped generate new content areas and innovative ways of using the Web that few could have imagined ten years ago. New Web technologies have enabled behaviors that simply didn't exist before, such as social networking, photo sharing, blogging, location-based activities and more. But true to form, men and women adopt these technologies at different rates and for different reasons, and in important ways that all stakeholders in the digital ecosystem need to understand.

Everyone from advertisers to content producers to agencies to non-profits to politicians and policy makers can benefit from understanding Web usage through a gender-specific lens. While some female behaviors are somewhat obvious, others are quite surprising. What we thought we knew about how moms, college girls, and retirees use the Web is constantly evolving. So if there is even a trace of a cultural anthropologist in you, and if you are curious about what can be learned by passively observing how women use the Web across the world, then read on.

Summary of Findings

- **Women ARE the digital mainstream.** While this may seem like a foregone conclusion, given that women have had online parity (at least in the U.S.) for the past ten years, many advertisers still believe that women's magazines, celebrity gossip and baby sites are the best places to reach women online. While these sites are effective in reaching women, they are by no means the only game in town. Women are actually more engaged than men on the Internet, and they chart their own course. You just have to know where to look.
- **Social networking is central to women's Internet experience.** Regardless of how much you believe that women are primarily communicators, networkers and facilitators, it's clear they are embracing social networking in a way that men are not. Furthermore, the rise of social networking has prompted women of all ages to engage in a host of associated online activities, such as photo-sharing, gaming, video viewing and instant messaging. All of these activities have benefited from their linkage with Social Networking sites in terms of their ability to attract new female users. Social retail, especially since it combines two activities that are already firmly in the mainstream of women's Web activity, may be the next frontier in this evolution. Social networking is also emerging as a key driver for women in the mobile sphere.
- **Divas drive the dollars.** In the U.S., currently the largest e-commerce market in the world, women are the key drivers of online buying. More women than men transact on the Internet and, collectively, they spend more. While e-commerce buying is not as developed in regions like Asia and Latin America, women across the world spend quite a lot of time on retail sites, indicating that as the e-commerce infrastructure and perhaps cultural norms evolve, this trend will continue in other markets.
- **Boys will be boys, but on the Web just like in the offline world, gender stereotypes only go so far.** Sports, Automotive, and Online Trading sites remain male strongholds online, but beware of extending other assumptions about online behavior. Women are just as likely to manage their money online, and moms and grandmothers have emerged as online gamers along with high school- and college-aged boys. And, engaging in online vices is no longer the exclusive territory of men.
- **Women Tweet like Venus, Men like Mars.** Even when their online behavior is similar, motivations can differ widely between the two genders. The adoption of Twitter is a great example – both genders adopted this technology at similar rates, but for different purposes.
- **The global is regional, the regional is local and culture prevails.** Perhaps because we are accustomed to thinking of the Internet as a global entity, we are often surprised by the degree to which regional differences emerge in Internet behavior. Beyond the quantifiable influences of Internet and broadband penetration in emerging markets, cultural differences will always inform differences in online behavior by gender. This will be important to remember when tracking the evolution of the large and rapidly growing markets in Asia, Latin America and elsewhere in the world.

Category Highlights

The Gender Divide

- As a percentage of global Internet users, women are still slightly in the minority but are catching up quickly. Differences are most stark in developing countries where Internet penetration is still low; in many developed countries, the split is about equal. However, once online, women are more connected than men.

Women and the Social Web

- The Communication and Social Networking categories are key drivers of Web usage for both genders, but they occupy a larger proportion of time for women, and this is increasing over time.
- A growing proportion of older women are engaging in social activities on the Web. It seems that once they discover it, they embrace it quickly and their usage rivals that of younger women.
- Photo-sharing sites are most popular among younger women, but women of all ages have embraced it as a key component of the social networking experience.

Women and Retail

- Women tend to shop more online – not a surprise. However, how and where they shop, as well as what they shop for, is notably different than men.
- Women drive a disproportionate amount of online spending. In the U.S. market, women make up just under half of the Internet population but generate 58 percent of e-commerce dollars.
- Retail usage is category-specific and extends from site visitation to shopping to buying online.
- Savvy retailers are translating the social aspect of shopping to the online world to capitalize on two key aspects of women's Internet usage.

Content for Women?

- Community and Lifestyle sites, traditionally aimed at women, continue to attract this audience, especially with parenting, food and home-related content. Health sites continue the trend of attracting primarily female audiences.
- Topic areas that are male mainstays in the offline world – automotive, sports and some aspects of finance – are also male-heavy online. There are, however, some areas of finance where women outpace men. And, women are actively engaged in areas that are typically associated with males, such as adult content and gambling.

Search Activity

- Women have different preferences when it comes to online search. In particular, they exhibit a preference for Bing in a way that men don't.

Entertaining Women

- The rise of online solitaire, card and board games has generated a new audience of avid gamers: women.
- Women tend to consume less video overall than men but show more of a propensity for YouTube.

Mobile Women

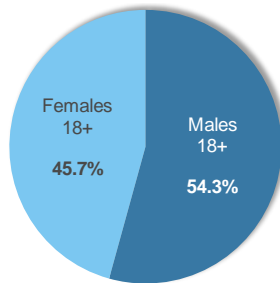
- Women generate a smaller share of online activity in the mobile space, but this is because they are less likely to own a Smartphone or have an unlimited data plan, both key drivers of mobile Internet usage. Unsurprisingly, social networking is a key element of women's use of the mobile Internet.

THE GENDER DIVIDE IN THE GLOBAL ONLINE POPULATION

ONCE CONNECTED, WOMEN EMBRACE THE DIGITAL EXPERIENCE

Globally, women are still slightly in the minority, with nearly 46 percent of the global Web population being female.

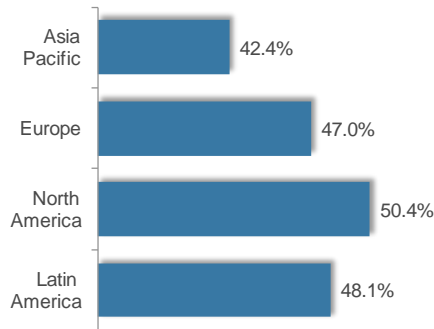
Global Internet Population, 18+



Worldwide Audience (18+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

In North America, the Web population is evenly split. However, in Asia Pacific, Europe and Latin America, women are still underrepresented.

% Women 18+ in Regional Internet Populations

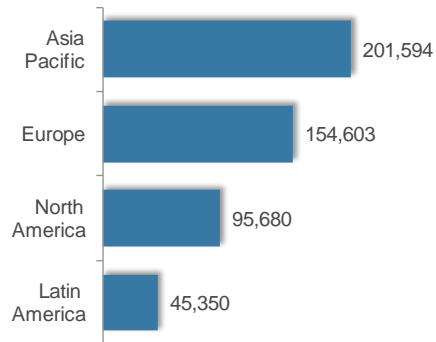


Regional Audiences (18+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Singapore, the U.S., New Zealand, Russia and Canada have the highest proportion of adult female Web users – all with 50 percent or more. Countries with the lowest proportion of female Web users include two countries where Internet penetration is still extremely low – India and Indonesia, with 28 and 35 percent, respectively.

Asia is undoubtedly the largest regional online market, and is still growing rapidly. Women online in Asia outnumber women in North America by more than two to one. China alone accounts for more women online than all of North America and, together with Japan, South Korea and India, account for more women online than Europe.

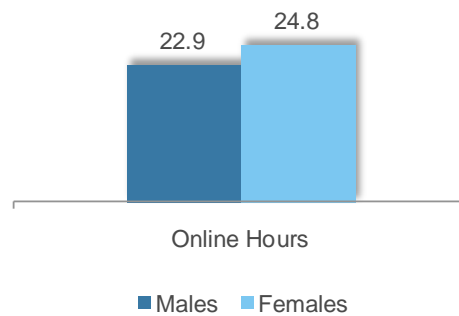
Women 18+ (000) in Regional Internet Populations



Regional Audiences (18+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

The average 15+ female spends 8 percent more time online than her male counterpart. In April, the global average was 24.8 hours per month for women, compared to 22.9 hours for men.

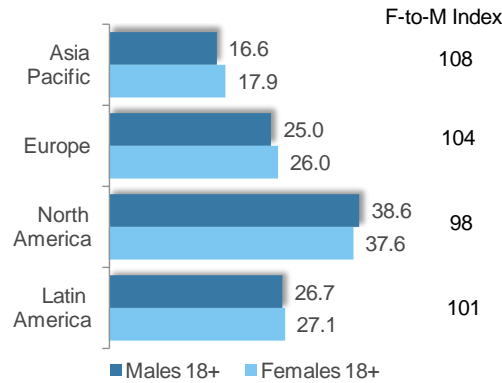
Total Time Spent Online: Males vs. Females



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Overall, Web users in North America spend the most time online, and adult men spend slightly more time online than adult women. In other regions, however, the average time spent online by women is slightly higher than that spent by men.

Average Time Spent Online by Region: Males vs. Females



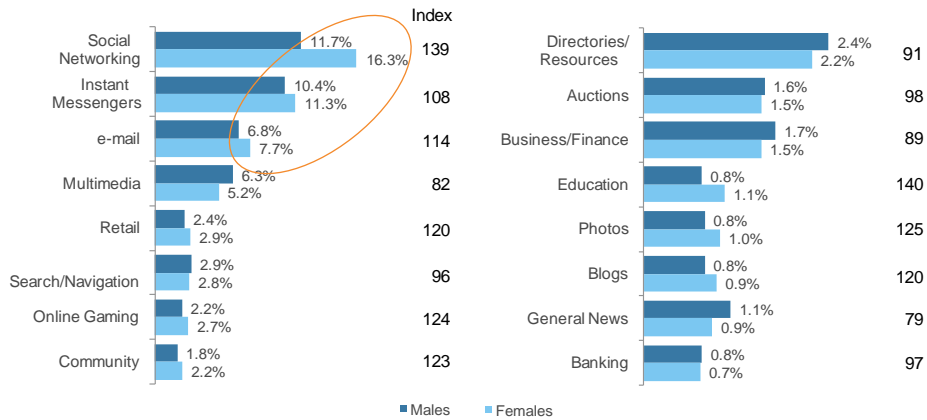
Hours per Visitor, Regional Users 18+, April 2010
Source: Media Metrix Worldwide

HOW WOMEN SPEND THEIR TIME ONLINE

A few different metrics and rankings provide insight into which site categories are more likely to be visited by women, and which categories capture the greatest share of women’s time and attention online.

First, we look at how various site categories capture share of time for each gender. The following chart ranks online categories by the share of women’s total online minutes and compares it to the category’s share of men’s total time online. The index value indicates the relative degree by which women are more likely to spend time on a certain category when compared to men. Indices over 100 signify categories in which women spend more than their ‘fair share’ of time online. Conversely, indices below 100 signify categories in which women spend less than their ‘fair share’ of time online.

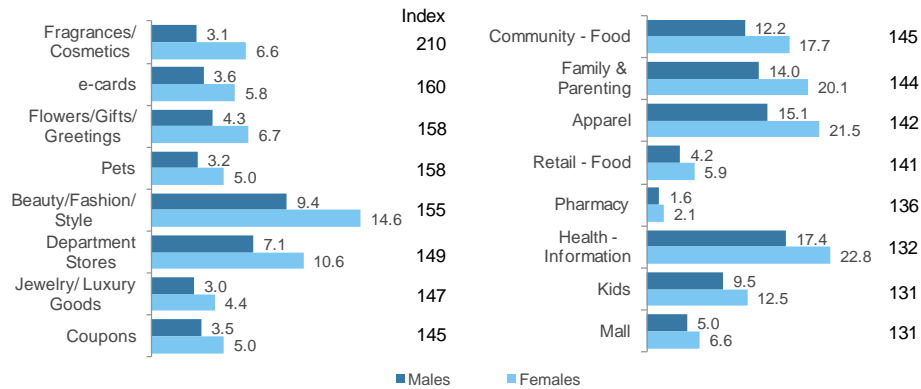
Share of Time Spent Online: Females vs. Males



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

For a related but slightly different view, we look at the highest reach indices for women compared to men in order to find categories in which the difference between male and female behavior is greatest. It's not terribly surprising that women over-index most heavily in the following categories: Fragrances/Cosmetics (210), E-cards (160), Flowers, Gifts and Greetings (158) and Pets (158).

Top Indexing Categories: % Reach for Females vs. Males



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

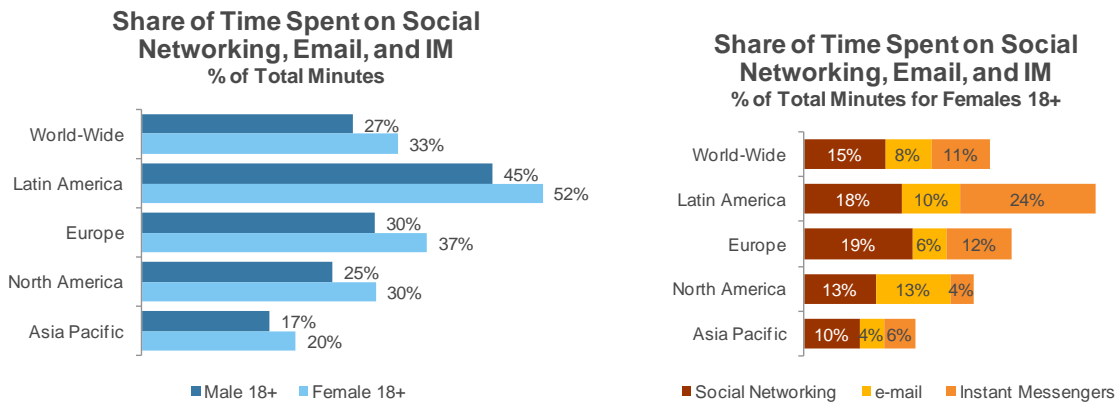
WOMEN AND THE SOCIAL WEB

WOMEN ARE MORE SOCIAL THE WORLD OVER

In the U.S., women are more active than men when it comes to socializing on the Internet. According to comScore Plan Metrix, nearly 56 percent of adult women say they use the Internet to stay in touch with people, compared to 46 percent of adult men. And, on a global scale, 'social' categories like Social Networking, Instant Messenger (IM), and Email represent the largest drivers of women's use of the Web. Time spent on these sites by women also outweighs time spent by their male counterparts in every global region.

On a regional basis, the amount of time represented by these activities varies significantly. Women in Latin America spend the greatest share of time on these 'social' sites, making up 52 percent of their total time online. They spend the greatest proportion of time on IM (24 percent) followed by the Social Networking (18 percent) and Email (10 percent) categories. Meanwhile, women in Asia Pacific only spend about 20 percent of their total time online on these 'social' sites, with half of that time spent on Social Networking sites.

It's interesting to note that across countries, the relative importance of social networking varies – reflective, perhaps, of overall cultural differences. However, no matter the region, women are consistently more social on the Web than their regional, male counterparts.

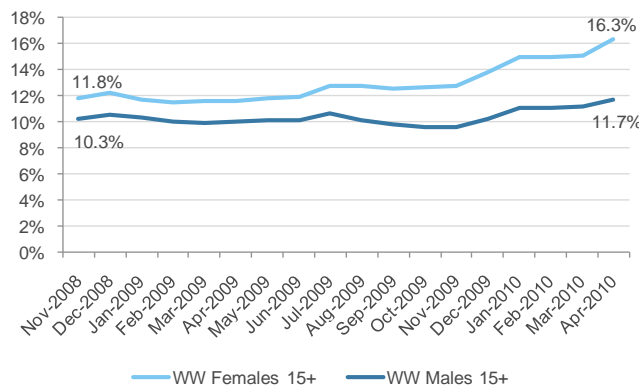


Worldwide Audience (15+ accessing from Work or Home), March 2010
Source: Media Metrix Worldwide

SOCIAL NETWORKING: BECOMING NEARER AND DEARER TO WOMEN

When we look specifically at the Social Networking category, it becomes even clearer how important this activity is for women online. While social networking has increasingly become a more popular activity for all Internet users, it is significantly more important to women. Globally, women spent an average of 16.3 percent of their online time on social networks in April 2010, compared to only 11.7 percent for the men. The increase over the past year shows the growing importance of social networking to women's online experience. This trend has important implications for Social Networking sites, both in terms of content as well as the user experience.

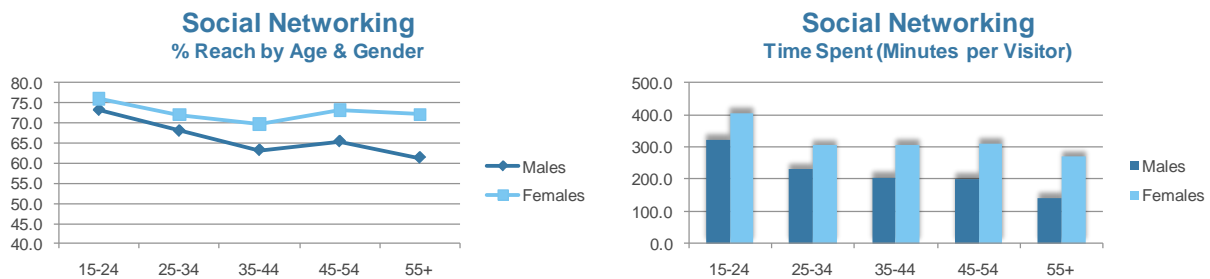
Social Networking: Share of Total Minutes, Males vs. Females



Social Networking Minutes/Total Internet Minutes
Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

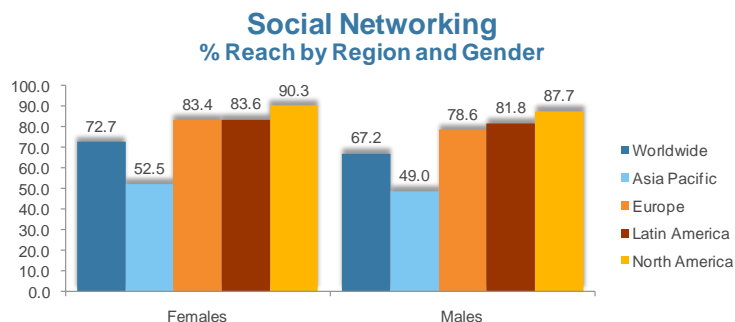
Interestingly, the 45+ female segment is driving the greatest proportion of growth for Social Networking sites, in terms of both visitation and time spent. Users aged 15-24 have the highest reach and the heaviest usage in this category. Meanwhile, older women have similar reach and usage as the women 25-34 and 35-44, with all groups spending a significant amount of their total online time on these sites.

The divergence between male and female behavior in social network usage also becomes more pronounced in the older age segments – while male and female social networkers aged 15-24 have very similar reach numbers, in the 55+ age segment, their respective reach is separated by more than 10 percentage points. For older women, social networking is a new frontier they are embracing; men are doing so to a much lesser degree.



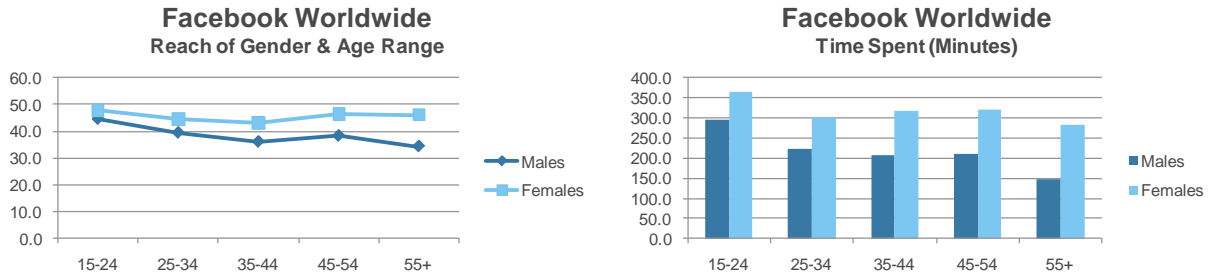
Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Social Networking’s reach is highest among women in North America, with 9 out of 10 female Internet users visiting a social network site in April 2010. The global average is significantly influenced by the relatively low reach in Asia Pacific, with a large number of users in regions with low Internet and broadband penetration (e.g. India, parts of Southeast Asia, etc.), and in areas where social networks and similar sites are highly restricted (e.g. mainland China).



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

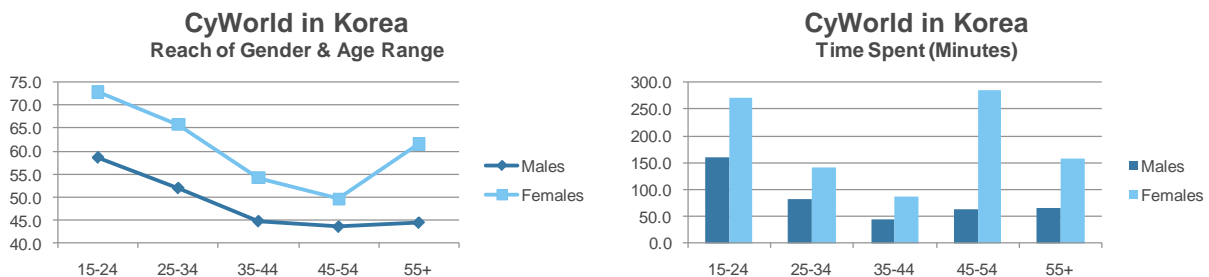
Facebook, which has emerged as the global leader in social networking, tells a very similar story as the overall category, with a comparable female skew toward reach and usage, without significant attenuation in the older age groups.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

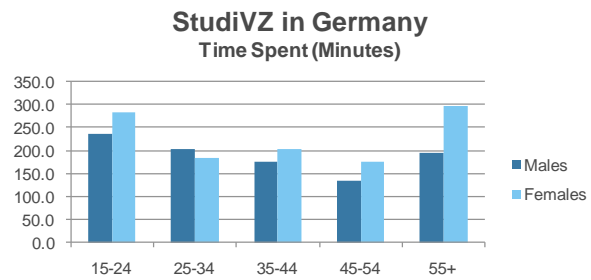
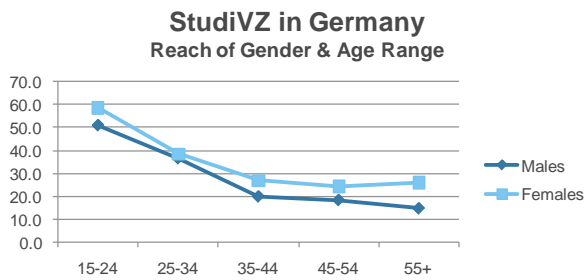
This effect is not limited to Facebook. These same trends are seen with other, regional social networking sites, where Facebook has not yet been able to unseat the local leader, despite its vast global popularity.

CyWorld, the most popular social network in South Korea, clearly appeals to older women, in addition to the youngest segment (15-24 year old) of Web users. Usage by 45-54 year old women is the highest of any demographic group.



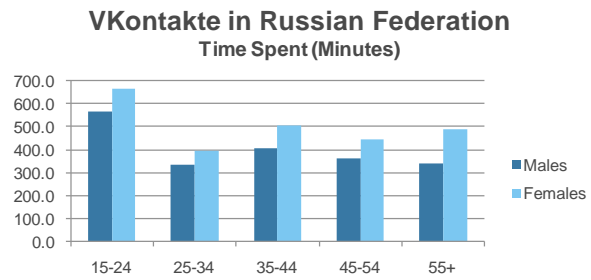
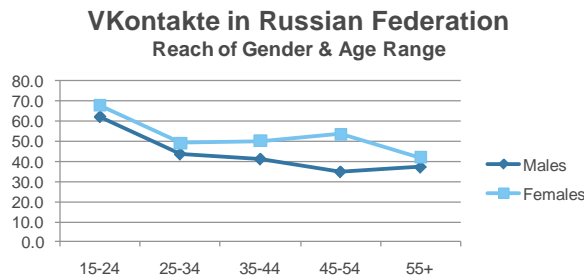
Korean Audience (15+ accessing from Work or Home), March 2010
Source: Media Metrix Worldwide

In Germany, the StudiVZ sites are the most popular in the category, more effectively reaching female users than males. Usage is also much higher among females, particularly in the older age groups. A relatively small number of women in the 55+ age group spend time on social networking sites, but those who embrace it do so to the same extent as younger women.



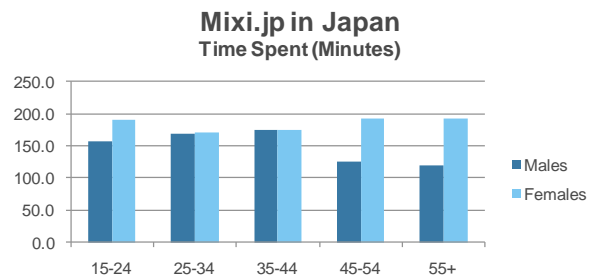
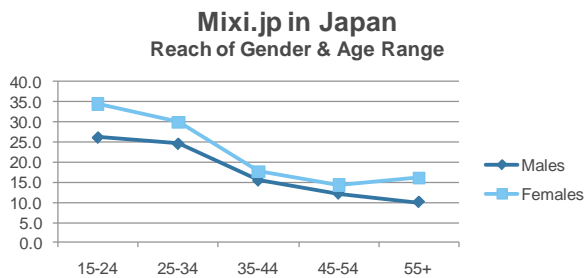
NOTE: StudiVZ Media Title includes SCHUELERVZ.NET, STUDIVZ.NET, and MEINVZ.NET
 German Audience (15+ accessing from Work or Home), March 2010
 Source: Media Metrix Worldwide

In Russia, Vkontakte.ru is the leading social network site and, once again, we see women outpacing men in terms of reach and usage in every age group.



Russian Audience (15+ accessing from Work or Home), February 2010
 Source: Media Metrix Worldwide

The same goes for Mixi.jp, the social networking leader in Japan. Here, we see that once women experience social networking they embrace it to a similar extent across all age groups.



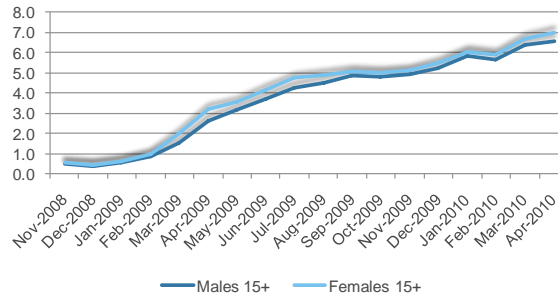
Japanese Audience (15+ accessing from Work or Home), February 2010
 Source: Media Metrix Worldwide

TWITTER: BROAD APPEAL, BUT FOR DIFFERENT REASONS

Twitter has also enjoyed widespread global growth and is an interesting site to examine because, while it is a communication mechanism and thus attractive to women, it also represents a new technology, which

typically tends to be tried earlier by men. However, in the case of Twitter we see that the site's reach is actually marginally higher among women than among men.

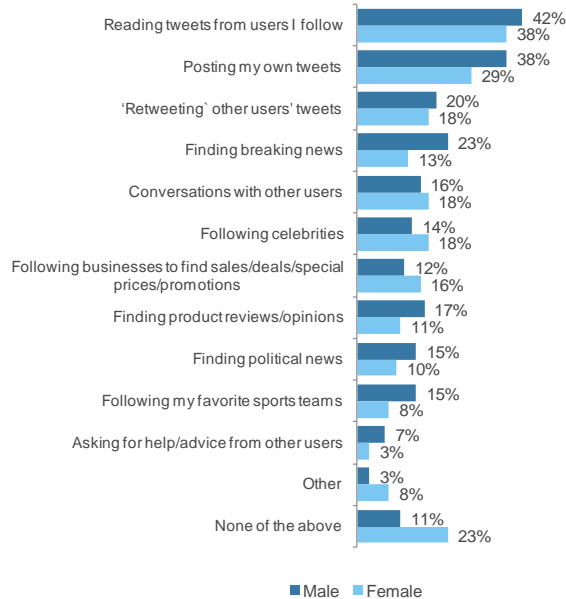
Twitter.com Worldwide Reach, Females vs. Males



Worldwide Audience (15+ accessing from Work or Home), November 2008 to April 2010
Includes only PC-based Twitter.com usage
Source: Media Metrix Worldwide

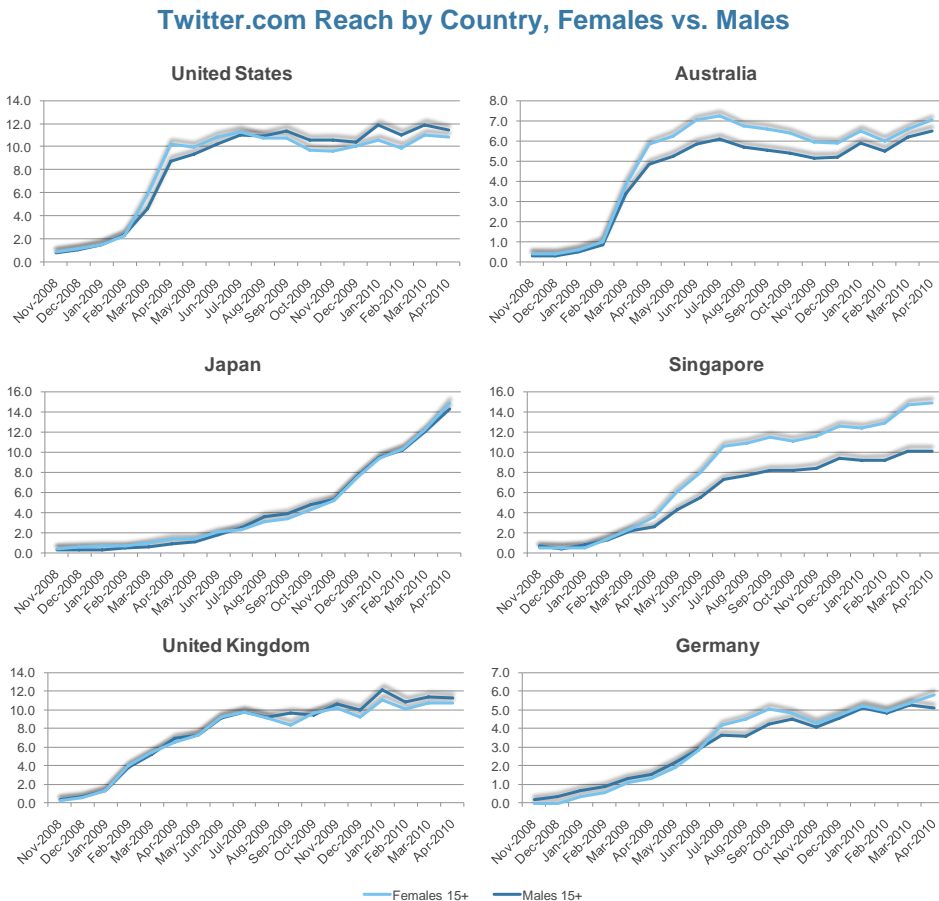
However, the role Twitter plays for women versus men seems to vary by context. In an April 2010 comScore survey, U.S. consumers were asked about how they use Twitter. Though the site has proved to be popular with both genders, it is not surprising that men and women use Twitter for different types of activities. Men are far more likely to post their own Tweets than women. Meanwhile, a larger percentage of female Twitter users say they use the site to find deals and promotions. Women are also more likely to use the service as a conversation medium and to follow celebrities.

Consumer Usage of Twitter Q: For which have you used Twitter?



Source: comScore Survey, April 2010

Globally, women slightly outpace men in adoption of Twitter, but this varies greatly by region and country. Australia and Singapore are two countries where the rate of adoption by women outpaced that of men, but in other countries the initial usage rates were similar.

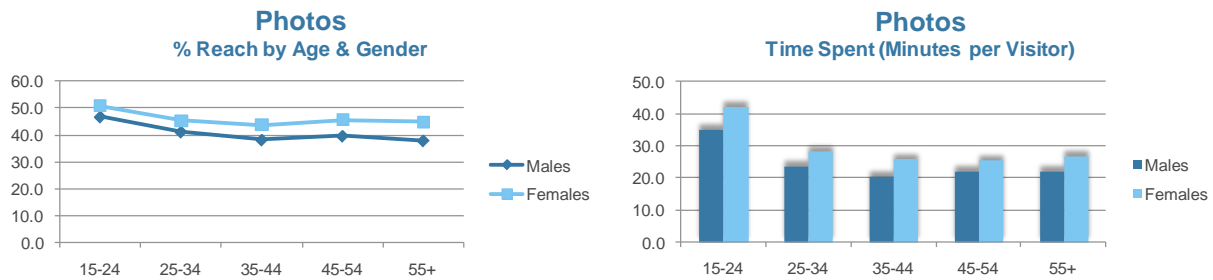


Worldwide Audience (15+ accessing from Work or Home), November 2008 to April 2010
 Includes only PC-based Twitter.com usage
 Source: Media Metrix Worldwide

SAY CHEESE! WOMEN CLICK AND POST

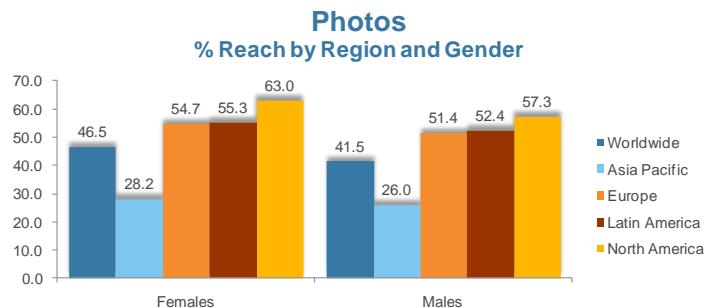
Another interesting component of women’s social activities on the Web is photo-sharing. Photo-sharing sites have become a large part of the social networking experience. With ubiquitous access to digital cameras and camera-equipped cell phones, taking and posting photos online is particularly popular among younger Web users.

Women surpass men in every age group in both reach and time spent on photo sites. They were also much faster to adopt photo sharing when it first became available.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Photo sites are most popular in North America, with 63.0 percent of women and 57.3 percent of men visiting them in April 2010. Latin America, notable for its large online population of young urbanites, shows high reach and usage of these sites despite relatively low broadband penetration in most parts of the region. Only Asia is notable in its significant lag in the use of Photo-sharing sites, which mirrors the relatively low reach of social networks there also.

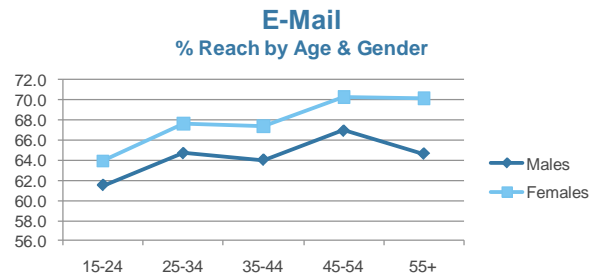
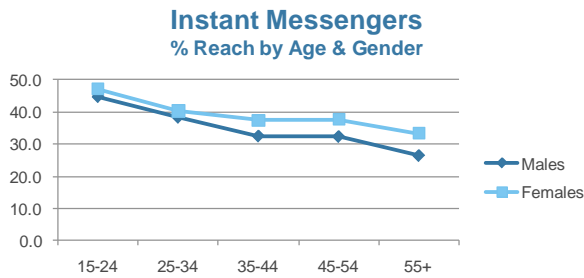


Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

COMMUNICATION IS KEY

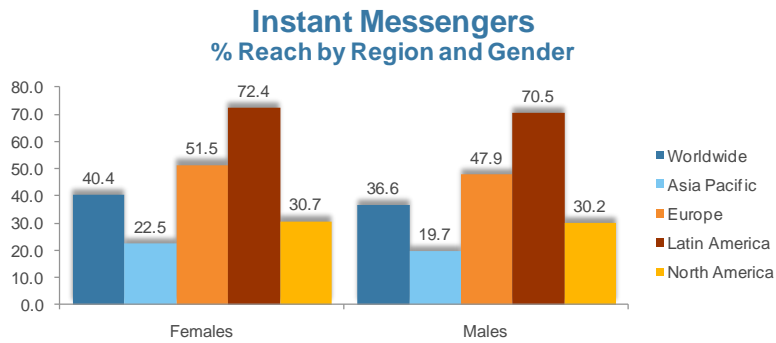
Younger Internet users have a much stronger affinity for IM, with the reach for 15-24 year olds at more than 45 percent; it declines rapidly as we look at older cohorts. Women slightly surpass men in percent reach, with older women slightly more likely to use IM than men in the same age groups.

Email, the activity that, from the early days of the Internet has been highly identified with growth in women's adoption of the medium, continues to be a category in which women spend a large share of their time online. Unlike the Social Networking and IM categories, however, Email's highest penetration is in the 45+ age group.



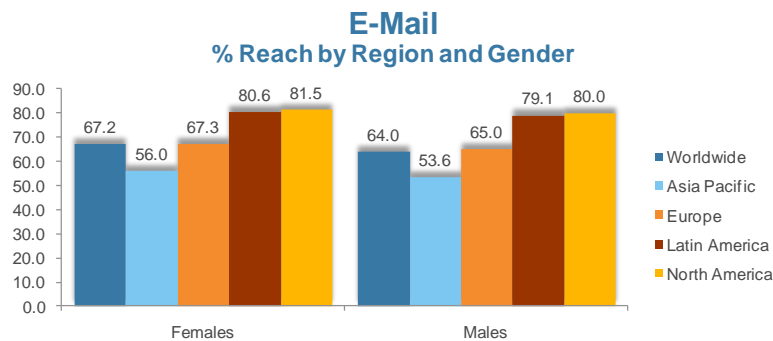
Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Latin America has an outsized impact on global use of IM: both men and women in the region are far more likely to use IM than users elsewhere in the world. The region’s online demographics, which skew young, are partly the reason for this. Another often-cited explanation is Latin America’s highly social culture, which extends to Web users’ online behavior as well.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Consistent with Latin Americans’ high reach in the IM and Social Networking categories, Latin American males and females are also more likely to use Email.

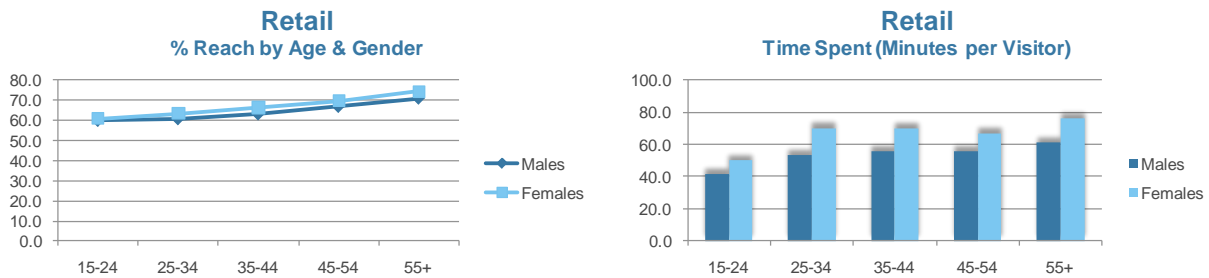


Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

WOMEN AND RETAIL

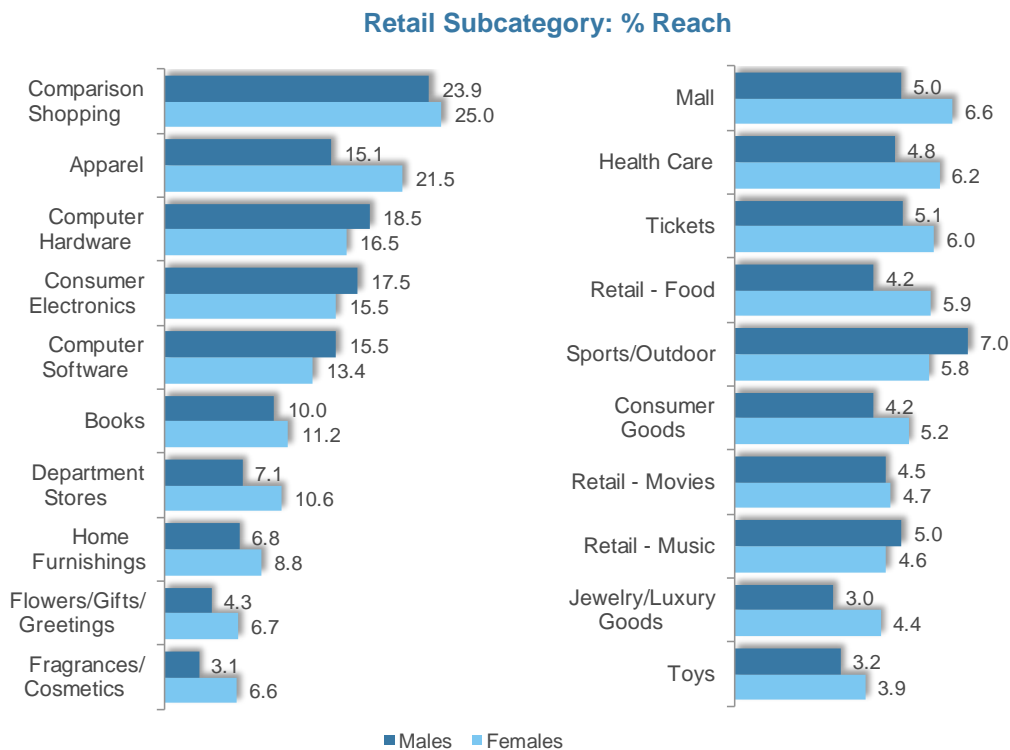
WHAT'S HOT AND WHAT'S NOT: THIS SEASON'S BIGGEST ONLINE RETAIL TRENDS

Retail, unsurprisingly, is also a key site category for women, and they spend 20 percent more time on retail sites overall than men. Though women and men of different ages visit Retail sites at roughly the same rate, women's time spent is much higher across all age groups.



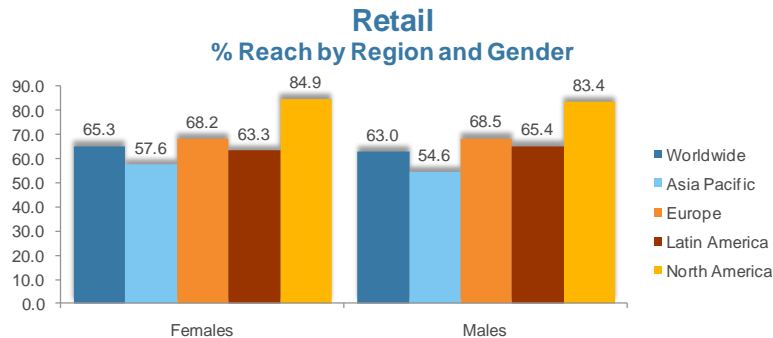
Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

In terms of categories, women out-shop men at almost every turn. Categories that are exceptions are Computer Hardware/Software, Electronics, Sports/Outdoor and Music (to a lesser degree). Outside those, women lead in shopping reach.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Though global penetration rates for Retail are similar within a few percentage points for both genders, there are significant variations in the percent visiting this category of sites across regions. Unsurprisingly, reach is highest in North America and Europe, where Internet users are accustomed to shopping and buying online. However, it is also clear that both men and women are using the Internet to research their purchases and compare prices, even in regions where e-commerce buying has not yet become the mainstream.

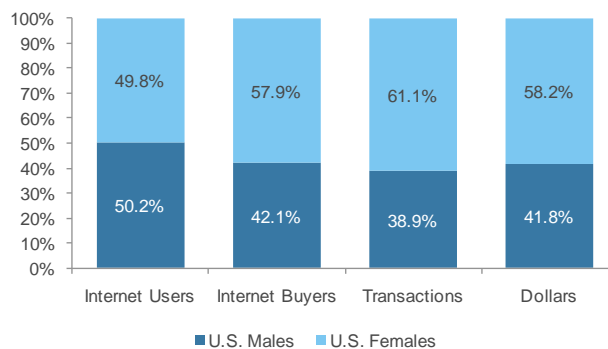


Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

OK, WOMEN SHOP ONLINE, BUT DO THEY BUY?

The short answer is 'yes.' In fact, they do more of their 'fair share' of online buying. In the U.S., women are more avid online buyers than men: 12.5 percent of women Internet users made an online purchase in February 2010, compared to 9.3 percent of men. Women's contribution to e-commerce is greater in terms of buyers, transactions and dollars. In February 2010, for example, they accounted for 49.8 percent of the U.S. online population, but made up 57.9 percent of all non-travel buyers, made 61.1 percent of online purchases and accounted for 58.2 percent of online dollars.

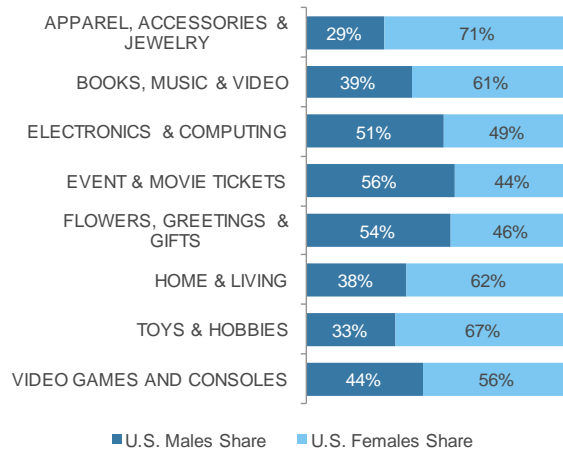
Share of Audience, Buyers, Transactions, and Dollars: Males vs. Females



U.S. Consumers, Non-Travel Internet Purchases, February 2010
Source: comScore e-Commerce Report, comScore Media Metrix

Among individual Retail categories, the bulk of e-commerce dollars spent on Apparel, Accessories, and Jewelry sites come from women. A skew toward women in Home & Living and Toys & Hobbies is equally predictable, particularly in light of their visiting activity. Women also spent more money on Video Games and Consoles than men. It is fair to assume, however, that many of these purchases were made for children in the family.

Share of Category Dollars: Males vs. Females



U.S. Consumers, Non-Travel Internet Purchases, February 2010
Source: comScore e-Commerce Report

There are also key differences in the type of online retailers that are preferred by men versus women. Regardless of age, men are much more likely to buy online at “pure-play” retailers (i.e. retailers such as Amazon and Zappos, etc.) that utilize a single sales channel to conduct business. For women, it’s a fairly even split between multi-channel and pure-play retailers. Multi-channel retailers (such as Best Buy, Walmart and Macys) use more than one channel to conduct business.

Propensity to Buy on Multi-Channel vs. Pure-Play Retailer Sites by Age and Gender % of Total Dollars Spent by Segment in March 2010 Source: comScore e-Commerce Measurement

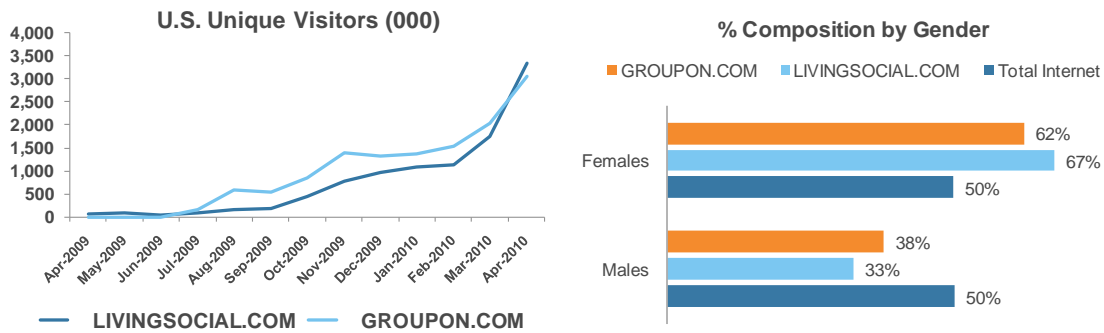
	Multi-Channel	Pure-Play		Multi-Channel	Pure-Play
Women <34	52%	48%	Men <34	29%	71%
Women 35-54	45%	55%	Men 35-54	31%	69%
Women 55+	44%	56%	Men 55+	40%	60%
Total Women	47%	53%	Total Men	32%	68%

THIS SEASON'S LATEST TREND: GROUP BUYING AND FLASH SALES

'Social retail' represents the convergence of two key areas of women's Internet activities. It is no surprise, then, that women make up the bulk of the audience and buyers on group buying and "flash sale" sites. They are also far more likely to use functionality on social media sites that allow them to share opinions and discuss potential purchases with friends and people in their networks (e.g. the 'Like' button on Facebook).

In the U.S., visiting group-buying sites such as Groupon.com and LivingSocial.com is growing exponentially, and women are driving the growth: females make up 62 and 67 percent of Groupon.com and LivingSocial.com's U.S. audiences, respectively.

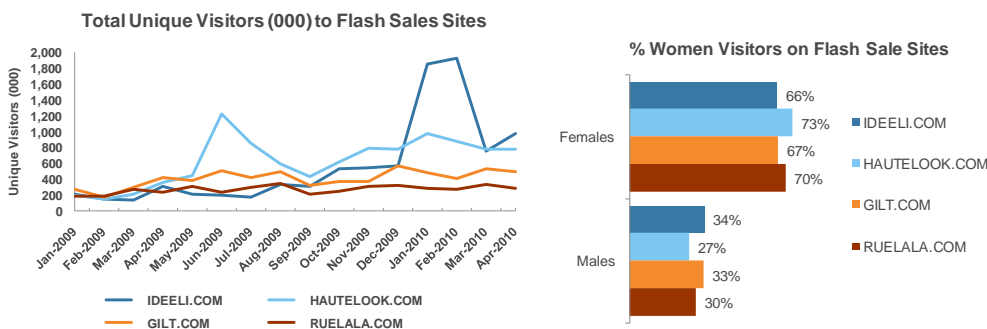
Visiting to Group Buying Sites



U.S. Internet Audience, April 2010
Source: Media Metrix

The newest trend in discount luxury retail is limited-time, members-only sample sales, also called 'flash sales'. Attracted by a varied mix of offerings and price points, the number of visitors to these sites is increasing exponentially. As with group-buying sites, more than two-thirds of visitors are women.

Visiting Flash Sales Sites



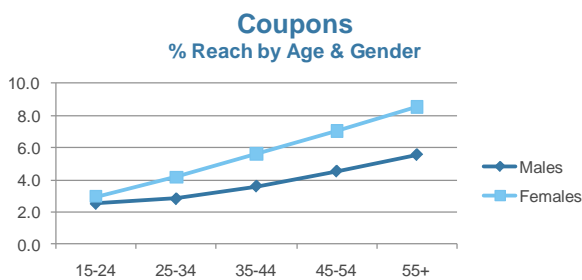
U.S. Internet Audience, April 2010
Source: Media Metrix

DIGITAL COUPON CLIPPING: THE NEXT GENERATION IN MONEY-SAVING ACTIVITIES

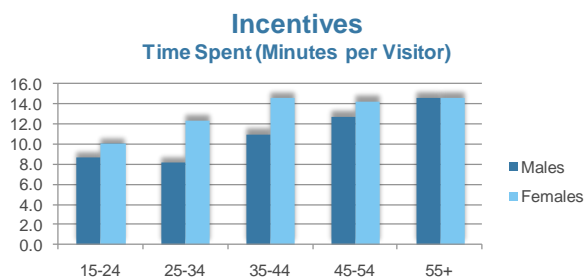
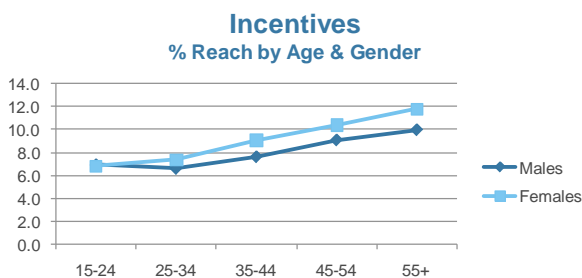
Visiting Coupon sites seems to remain squarely the purview of women, and has presumably become a necessity for many primary household purchasers in today's challenging economic times. In an April 2010 comScore survey, 42 percent of women compared to 34 percent of men listed coupons as being among the three online costs saving methods most important to them.

More women than men also say they are likely to use coupons when trying to save money (68 percent of female respondents versus 60 percent of male respondents), and they are also more likely to shop only when there are sales (49 percent versus 36 percent). They are also more likely to shop online for deals (35 percent versus 28 percent), and to sign up for loyalty or incentive programs (33 percent versus 23 percent).

More women visit coupon and incentive sites than men. On coupon sites, women aged 35-44 are far heavier users than men in the same age group.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide



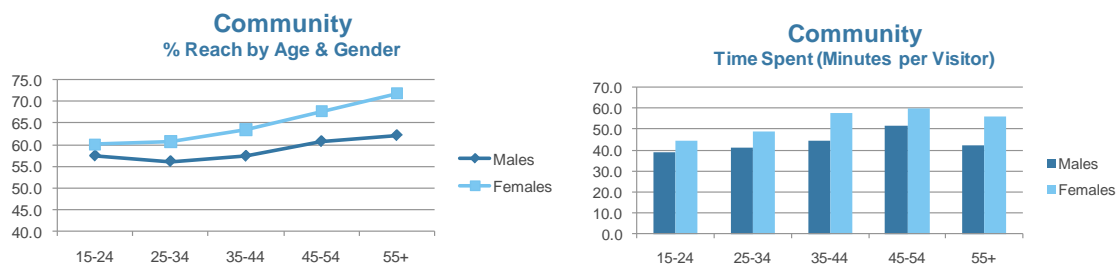
Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

IS THERE SUCH A THING AS ‘WOMEN’S CONTENT’?

Do so-called ‘women’s sites’ or ‘women’s networks’ necessarily have an edge in attracting and capturing women’s attention online? The answer is a resounding “yes” – but they’re certainly not the only game in town.

HOME AND HEARTH

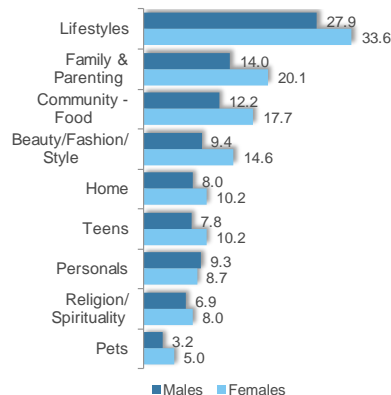
The community site category is composed of a range of personal-interest sites and, cumulatively, it is clear that women drive both the visiting to these sites, and their heavy usage. Older women are the most likely to visit these sites, and women in the 45-54 age group are the heaviest users.



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

Whether or not they work outside of the home, many women still fulfill primary child-care duties. With the increasing availability of online parenting resources, women are more likely to use the Web in this context than men: 20 percent of women visited a Family & Parenting site in April 2010, compared to 14 percent of men. Along with or on behalf of their children, women were also 31 percent more likely to visit sites with activities and content for kids. Food sites (both recipe/content and retail) and Pet Care sites are also more likely to be visited by women.

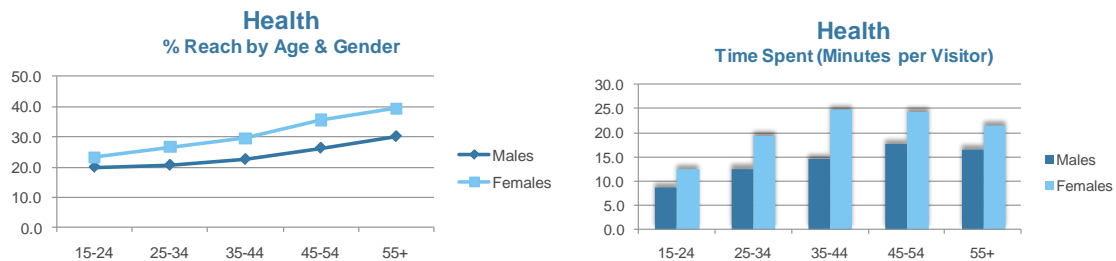
Community Subcategory % Reach



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

WOMEN AND HEALTH

Health sites have long been visited by women: 22.8 percent of women visited a Health-Information site in April 2010, compared to 17.4 percent of men. Pharmacy sites are also 36 percent more likely to be visited by women than their male counterparts. Health has one of the largest overall differences in male and female reach, with a 6-point gap between global males and females aged 15+. Again, the disparity increases with age – among users 55+ there is almost a 10-point difference in reach, and usage (although amounting to a fraction of the time spent on Email or Social Networking) is heaviest among women in the 35-44 and 45-54 age segments.

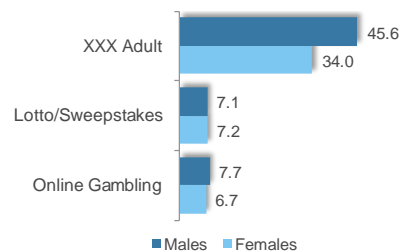


Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

WOMEN HAVE ONLINE VICES TOO

Looking at either the darker side of women’s online engagement (or the more fun side depending on one’s perspective), it’s safe to say that there is more to women’s online activities than socializing and shopping. While not to the same degree as men, a significant percentage of women view adult content. It is even more surprising to see its rank order in the context of women’s overall Internet usage: Health, Apparel, and Family & Parenting sites, which we know to be popular with women, had lower reach among the female audience than Adult sites. As for gambling, women demonstrate just as much interest as men. Women are more likely to visit Lotto/Sweepstakes sites than men, and are only one-percentage point behind the men in visiting Online Gambling sites.

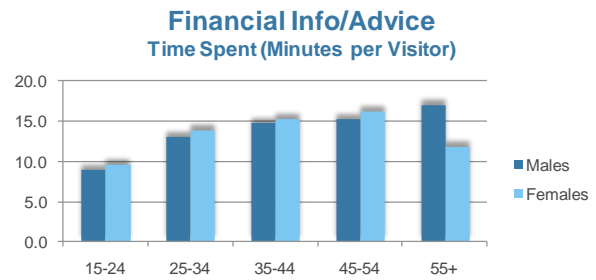
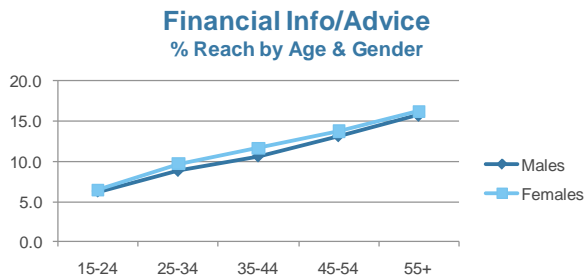
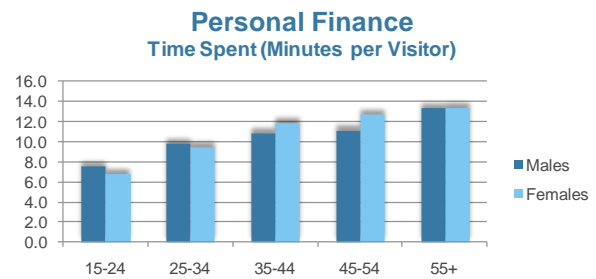
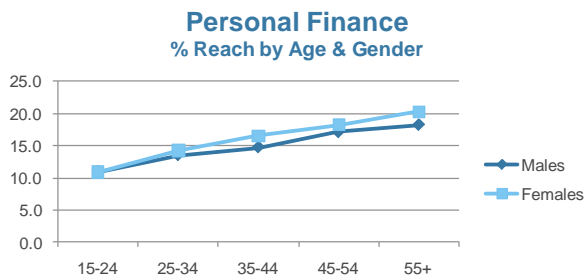
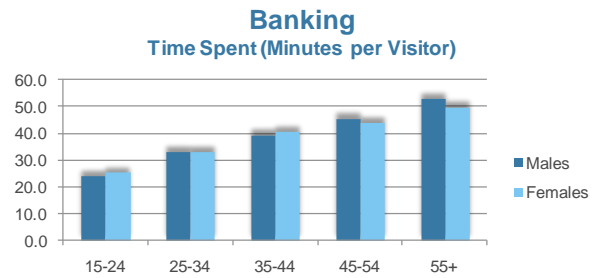
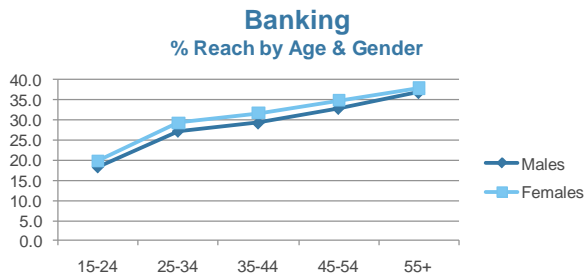
% Reach of Adult and Gambling Sites: Males vs. Females



Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

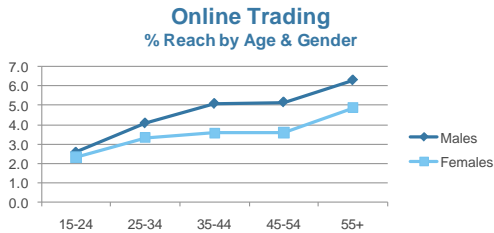
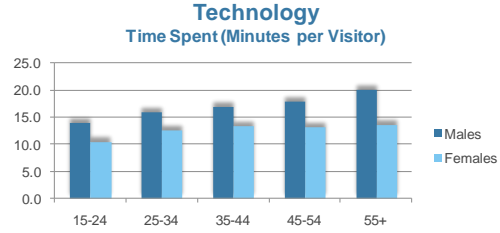
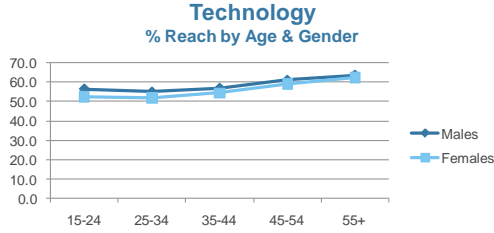
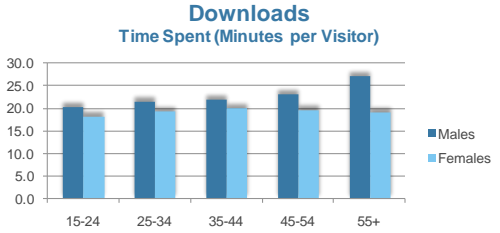
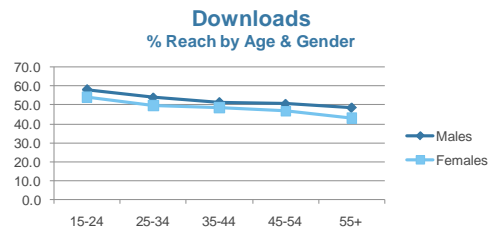
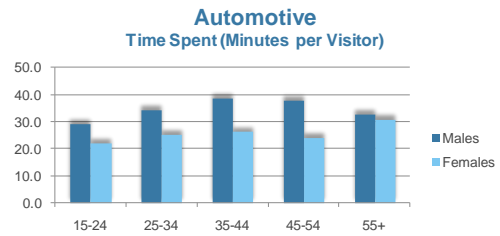
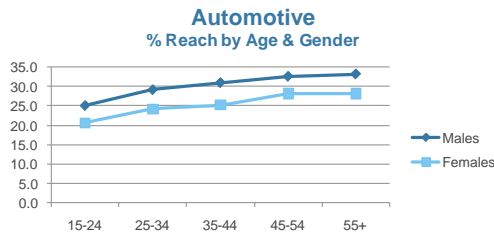
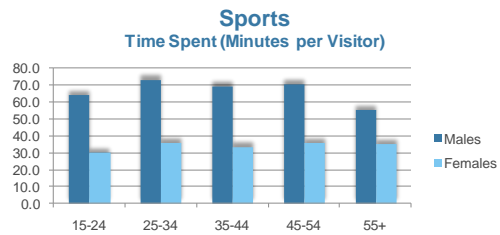
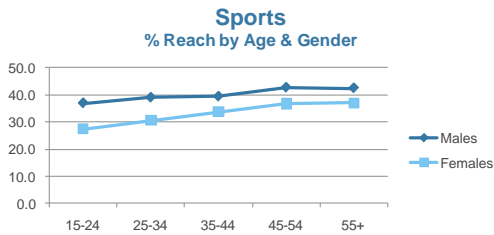
SAME BUT DIFFERENT

In the following site categories, male and female behaviors are roughly similar in terms of reach, though there may be some differences in usage levels. These data are Worldwide Audience (age 15+ accessing from Work or Home) in April 2010.



THE 'MALE CATEGORIES': JUST WHAT YOU WOULD EXPECT – ALMOST

Topic areas that are men's mainstays in the offline world are unsurprisingly also male-heavy online. One exception worth noting is that the reach of Sports sites among women is growing and is now approaching that of males. However, women are only half as engaged.

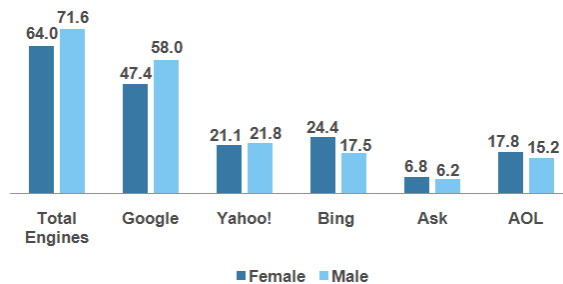


SEARCHING ON THE WEB

When it comes to search, men and women once again display different habits. On average, men conduct more searches per searcher than women (71.6 searches per searcher for men vs. 64.0 for women). For both men and women, Google is by far the most popular search engine. Interestingly, however, Bing seems to play a different role for women than for men. Women who use Bing conduct a significant amount more searches on this engine than their male counterparts. The same is true for Ask and AOL,

although to a lesser degree. One possible explanation could be that proportionately more women tend to use Internet Explorer as their core browser, which displays Bing as the default search engine; another could be that they simply prefer the experience.

Total U.S. Searches per Searcher: Males vs. Females



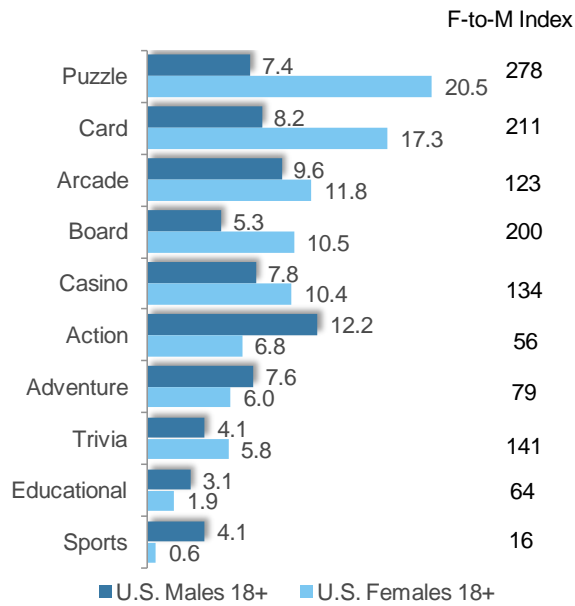
Source: comScore, Custom Search Data, U.S., April 2010

ENTERTAINING WOMEN

WOMEN ARE GAMERS TOO, BUT THE KINDER, GENTLER SORT

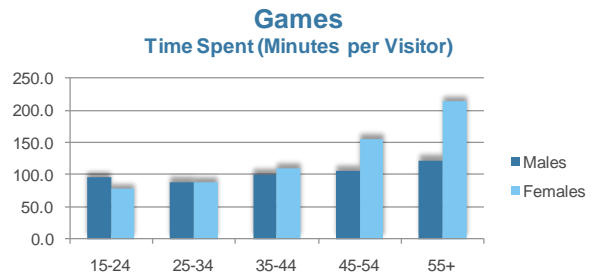
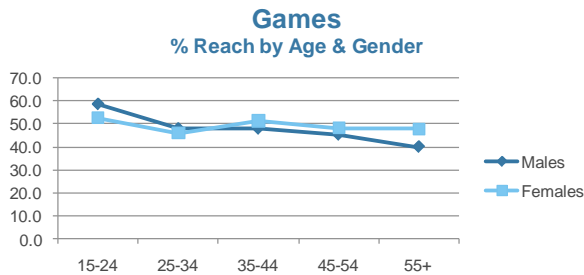
Women's high engagement with Games and Online Gaming sites may come as a bit of a surprise. However, this is indicative of the evolution of the gaming landscape, which has given rise to casual gaming – an activity that is very popular among women. Women are much more likely to play casual games (i.e. Solitaire, Sudoku and Scrabble) than action, adventure, and sports games, which are typically favored by young males. With a variety of casual games now available for networked online play ('play with your friends') within social networks, these familiar games and activities are making an even greater resurgence online. Action and adventure games are played by women as well, but to a much lesser degree. comScore Plan Metrix data shows that adult women in the U.S. are most likely to play puzzle, card and board games online, at rates that are more than twice that of adult men.

**% of U.S. Survey Respondents:
Types of Video Games played online in the past 30 days**



U.S. Internet Users 18+, April 2010
Source: Media Metrix Plan Metrix

In the Games category (which includes gaming information and online gaming), there are clearly two demographic groups that drive the category: young males (of whom there are more), and older females (who spend more time on the category). High reach and heavy usage in the 45-54 and 55+ female groups reflect the growing popularity of casual games among women.

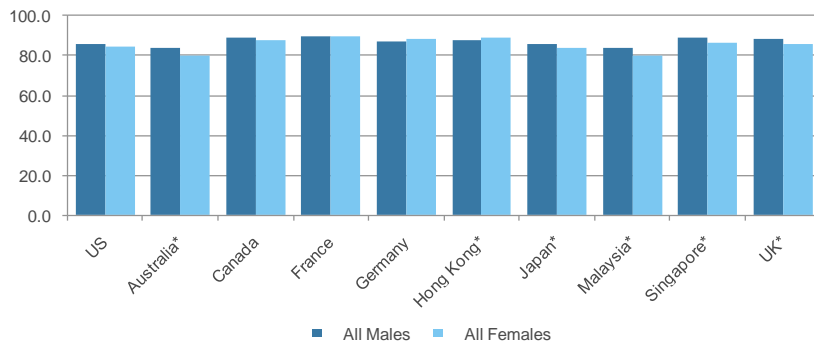


Worldwide Audience (15+ accessing from Work or Home), April 2010
Source: Media Metrix Worldwide

LOOK WHO'S TUNING IN TO ONLINE VIDEO

Though the reach of video among women is only slightly behind that of men, in most countries women spend far less time than men watching video online.

% of Web Population Viewing Video



Internet Users 15+ or Internet Users 18+ (denoted with *), March 2010
Source: Video Metrix

The most significant differences in women's and men's average durations are in countries where overall video usage is the heaviest: Germany, the U.K., the U.S., and Canada.

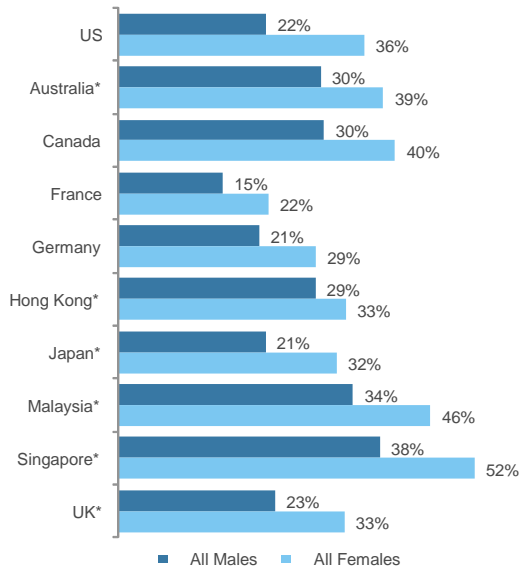
Average Hours Viewing Video



Internet Users 15+ or Internet Users 18+ (denoted with *), March 2010
Source: Video Metrix

In each country, however, women spend a much higher share of their time watching videos on YouTube than men. Even in countries where YouTube is not the leading online video provider (e.g. Hong Kong and Japan), women are still far more likely to watch a video on YouTube than on any other video property. Though YouTube is certainly apt to capture the bulk of video minutes for any demographic, women seem to be less likely to watch video from other sources.

YouTube Share of Total Video Minutes

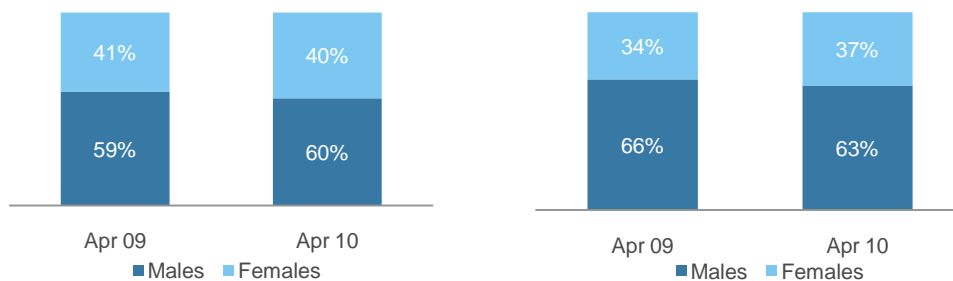


Internet Users 2+ or Internet Users 15+ (denoted with *), March 2010
Source: Video Metrix

MOBILE WOMEN

In both the U.S. and Europe, Smartphone usage is dominated by men. In the U.S., we see a fairly consistent 60/40 split, but in Europe the skew toward male users is slightly more pronounced, hovering around 63 versus 37 percent.

Smartphone Share: Men vs. Women

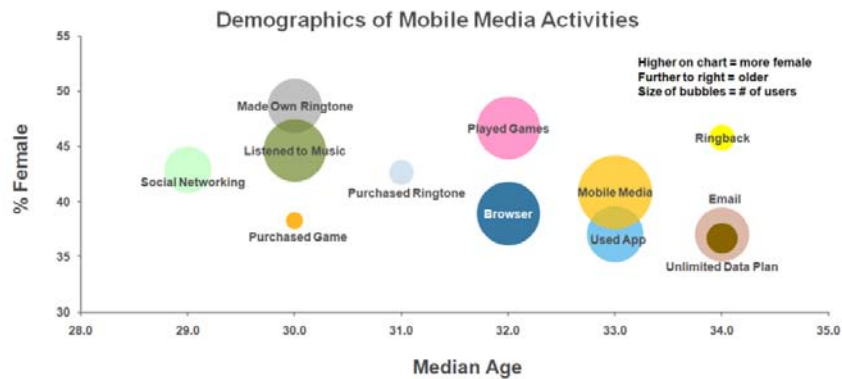


comScore MobiLens
U.S. and EU5 (France, Germany, Italy, Spain and U.K.)
3 months average ending April 2009 to 3 months average ending April 2010

There are a few possible explanations for this disproportionate share. Men are early adopters in the technology space, suggesting that this is yet another area where they lead the trend. However, it is interesting to note that as time passes, especially in the U.S., female share doesn't increase to the extent to which one might think it should. Another, perhaps more likely and certainly more provocative,

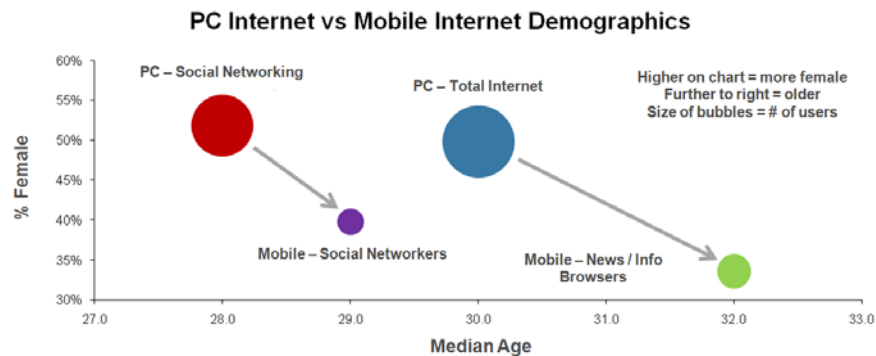
explanation is that men tend to be higher earners than women, thus affording them the ability to purchase a costly Smartphone and pay for a monthly data plan. comScore MobiLens data in the U.S. and in the E.U. also indicate that the vast majority of mobile users whose mobile phone plans are at least partially paid for by their employer are male.

Together, Smartphone ownership and unlimited data plans are known to be the key drivers in mobile Internet usage. The gender differences in mobile Internet behavior roughly mirror PC Internet behavior, with older women more likely to play games and check email, and for men to be more likely to access News/Info sites using their mobile phone. Still, however, mobile Internet services (browsing, apps, and email) skew 65-70 percent male.



comScore MobiLens
EU5 (France, Germany, Italy, Spain and U.K.)
3 months average ending March 2010

The age difference between PC and mobile Internet users is indicative of the need for money when browsing on the mobile device (e.g. advanced device and data plans). Women’s adoption of mobile social networking, however, is a clear indicator that mobile Internet services are moving out of early adopter mode and into the mainstream.



comScore MobiLens + comScore Media Metrix
EU5 (France, Germany, Italy, Spain and U.K.)
3 months average ending June 2009

CONCLUSION

The big take away from this study might be summed up by the lyrics from the old song, “I am woman, hear me roar, in numbers too big to ignore.” Women across the world are driving some of the most mainstream aspects of the Internet experience today—the social Web, e-commerce, flash shopping and consumption of user-generated content via YouTube. They have spawned a whole new genre of Internet games, and have driven much of the blogging and photo sharing activity. They tweet, they share, they shop, they search—but for their own reasons, in their own way and on their own terms. The main thing holding them back is Internet connectivity, and that barrier will gradually be removed going forward. Although mobile adoption among women seems to trail men currently, this appears to be primarily driven by availability of data plans rather than an inherent tendency to be less engaged. As data plans become more available and affordable, women will take their seat at the mobile Web table as well. Once women connect, they engage; once they engage, they embrace; once they embrace, they drive. And that’s the future. The Internet: it’s women’s work.

ABOUT COMSCORE

comScore, Inc. (NASDAQ: SCOR) is a global leader in measuring the digital world and preferred source of digital marketing intelligence. comScore helps its clients better understand, leverage and profit from the rapidly evolving digital marketing landscape by providing solutions in the measurement and evaluation of online audiences, advertising effectiveness, social media, search, video, mobile, e-commerce , and a broad variety of other emerging forms of digital behavior. comScore's capabilities are based on a global panel of approximately 2 million Internet users who have given comScore explicit permission to confidentially capture their browsing and purchase behavior. These data can also be combined with census-level Web site or telecom carrier data to provide the most comprehensive and unified measurement of digital activity. comScore's recent acquisition of ARSgroup adds one of the industry's most validated measurement of the persuasive power of advertising in TV and multi-media campaigns. comScore services are used by more than 1,300 clients around the world, including global leaders such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, Facebook, France Telecom, Financial Times, Fox, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon Services Group, ViaMichelin and Yahoo!. For more information, please visit www.comScore.com.

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