

UNICAST

What Women Want From The Web Report

June 2010

Introduction

Women have enormous purchase power – 85% of all brand purchases are made by women. As the CHO – Chief Household Officer – American women make 92% of vacation purchases, 93% of food purchases and control \$7 billion in annual spending. As the primary shoppers, women are a key audience for advertisers. For online advertisers, knowing what women want from the web is essential for campaign success.

As women bring more of their daily tasks and media consumption online, this summer they'll be plugged in to connect with friends, shop for deals, plan vacations and entertainment activities, and use the web for fun – playing games, music and watching TV shows/movies.

To complete these activities, women plan to visit a wide range of sites. This report helps advertisers learn what women plan to do online this summer, where they'll be going to complete these activities, and what types of advertising (for what products) will attract their attention?

Key Findings

- The most popular online activities for women this summer: 76% plan to connect with friends and family, 67% will keep up with the news, 64% plan to shop for sales/compare prices, 59% intend to entertain themselves (play games, listen to music or watch TV/movies), and 48% will research travel/vacations.
- Women age 18-24 are more inclined to use the Internet for most activities, and also more receptive to online advertising in various formats, particularly more interested than women overall in localized information, surveys, social media formats and exclusive downloadable content.
- The most popular ad content is for sales and discount codes – 46% of women notice these, followed by creating/submitting an entry to win a prize – 31%. About one in four women notice an ad with localized information, like area movie listings.
- Women notice ads for items they're already interested in – 56% of women planning to look up entertainment options this summer have noticed an entertainment ad in the past month and 46% of women planning to research travel have noticed a travel ad.
- Women with children in the home tend to do more activities online than those without children, including listen to music (62% vs. 42%), watch TV or movies (56% vs. 46%) and look up entertainment options (60% vs. 40%).
- Women that visit blogs notice online advertising far more than overall respondents, but this is a small group with just 13% of women planning to visit a blog this summer.

Analysis of Findings

FUNctionality: American Women Use the Internet for Planning and Entertainment

When provided with a list of ten activities Web users might complete online this summer, fully 95% of American women selected at least one of the activities, as outlined in the nearby textbox. Whether looking at world events or happenings a bit closer to home, Americans viewed the Internet as their connection to the latest news. Seventy-six percent of women said they plan to go online to keep in touch with family or friends, now possible through a myriad of communication tools and social media. Following closely, staying up-to-date with current events was selected by more than two-thirds of women (67%).

More than three-in-five women (64%) viewed the Web as a “shopper’s best friend,” reporting they will use it this summer to search for deals or compare products or prices. Forty-three percent of women expect to complete a similar exercise when researching or booking travel or vacation. To support these shopping and travel habits, 32% of females plan on clicking through the online classified to search for a job.

Of the following activities, which do you plan to do online this summer? Select all that apply to you.

(N=516, ROTATED, ALLOWED MULTIPLE RESPONSES)

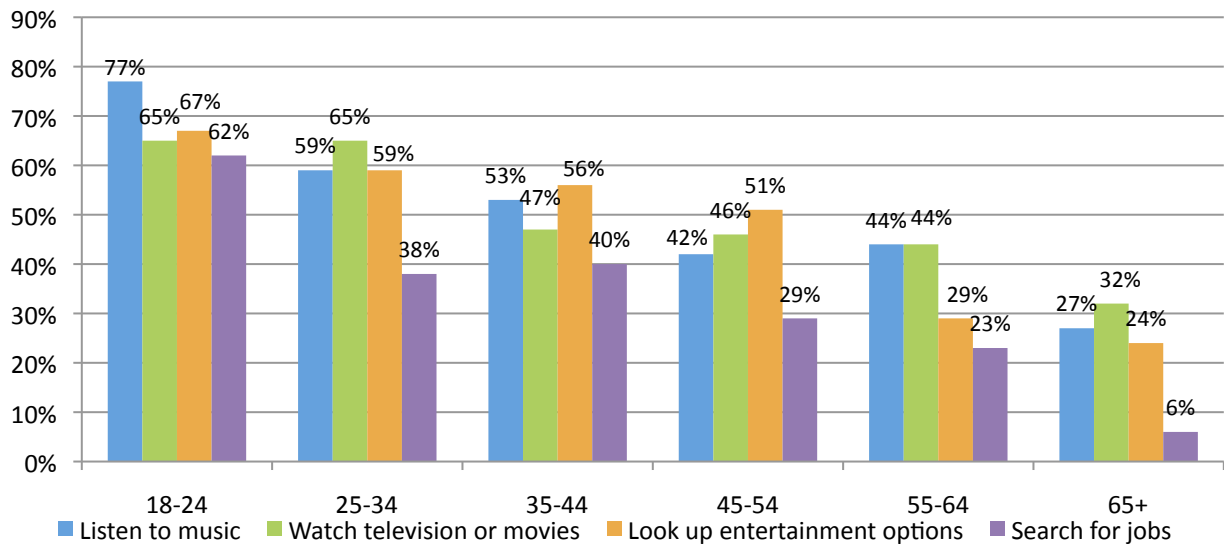
76%	Connect with friends and family
67%	Keep up with the news
64%	Shop for sales and/or compare prices
59%	Entertain themselves
50%	Play games
50%	Listen to music
50%	Watch television or movies
48%	Look up entertainment options (summer movies, events in my area, sports)
43%	Research or plan travel and vacations
32%	Search for jobs
20%	Follow sports teams or competitions
5%	I don't plan to go online or complete any of these activities (RESPONDENTS COULD NOT SELECT OTHER ANSWERS WITH THIS RESPONSE)

Recognizing the exploding entertainment era of the Internet, 59% of women plan to use the Web for entertainment - gaming, music listening or watching TV/movies.

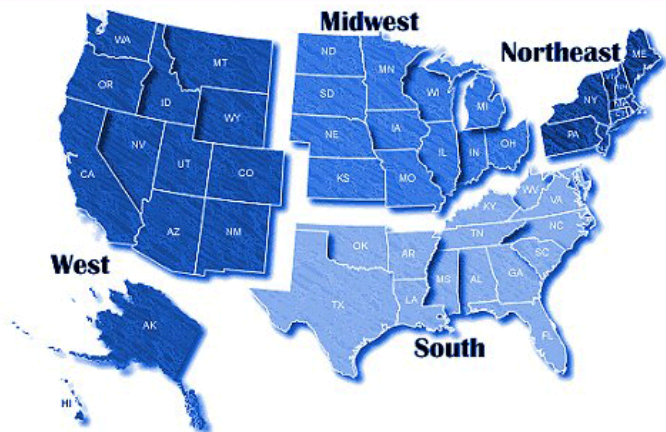
- The propensity to use the Internet to “keep up with the news” trended upward with age among women (53%, 18-24; 68%, 35-34; 63%, 35-44; 67%, 45-54; 78%, 55-64; and 73%, 65+). Online gaming was most popular with females age 18-24 (66%), 25-34 (53%), and 55-64 (54%). However, younger Americans dominated a number of other online categories, as demonstrated in the following chart.



Planned Online Activities by Age Cohort



- Women reported similar plans for online activities across the country and among the potential responses provided to survey takers. A majority of women in the Northeast (59%) and Midwest (51%) will be searching for summer entertainment options in their area compared to 48% of female survey takers in total. Thirty-nine percent of Westerners will be pointing and clicking in their job search, a higher proportion than the 31% who will be doing so across the country.



- Women with children in the household were significantly more likely than those without kids living at home to plan for the online activities outlined in the nearby chart.

Online Activity	Women <u>without</u> Children in the HH (N=316)	Women <u>with</u> Children in the HH (N=199)	Children Under Age 13 (N=151)	Children Age 13-17 (N=94)
Connect with friends and family	73%	80%	79%	83%
Shop for sales and/or compare prices	62%	68%	65%	69%
Play games	46%	55%	55%	58%
Listen to music	42%	62%	63%	64%
Watch television or movies	46%	56%	57%	53%
Look up entertainment options	40%	60%	58%	65%
Research or plan travel and vacations	39%	49%	48%	52%
Search for jobs	30%	36%	36%	32%
Follow sports teams or competitions	18%	22%	19%	31%

American Women Share Top Site Types for Online Interests

The 95% of female survey takers who selected an online activity in the first inquiry were asked to delineate the types of websites they might visit to complete those tasks online. Search engines proved to be the portal into the online world for 75% of women, as were travel-specific search sites (31%).

Since 76% of women expected to keep in touch with family and friends online this summer in the previous inquiry it is no surprise that three-in-five (60%) will be using social networks like Facebook or LinkedIn to do so. Similarly, nearly one-half of women who selected one of the online activities (48%) will visit news sites to be “in the know.” A smaller proportion of females (13%) will be checking a favorite blog to learn the latest on an area of interest.

Fully 60% of female survey takers responding to this inquiry will click on a website to hunt for the best deals or to procure an item through a classified listing. One-quarter of women (25%) selected the “job boards” as an online destination this summer.

To pass the hours online, large percentages of women completing online activities will be visiting entertainment-focused websites including aggregators of music, movies, and television (30%), television networks or popular show sites (31%), gaming pages (31%), and sports-centric websites (15%).

For the online activities you selected in the previous question, which types of sites are you most likely to visit this summer? Select all that apply. (ROTATED, ALLOWED MULTIPLE RESPONSES) (N=490, excluded survey takers who selected “I don’t plan to go online or complete any of these activities” from Q1)

75%	Search engines (ex. Google, Yahoo!)
60%	Shopping or classified sites (ex. Amazon, Ebay, Craig’s List)
60%	Social networks/ forums (ex. Facebook, MySpace, LinkedIn)
48%	News and broadcast news websites (ex. MSN.com, ABC.com, CNN)
31%	Travel-specific search engines (ex. Priceline, Tavelocity, Hotwire)
31%	Individual television network or television show websites (ex. ABC.go.com or Fox.com/House)
30%	Television, music or movie aggregators (ex. Hulu, Pandora)
15%	Sports-specific sites (ESPN, individual team sites)
24%	Gaming sites (ex. WoW, Blizzard, OnlineGaming)
25%	Job Boards (ex. Monster, CareerBuilder, HotJobs)
13%	Blogs (ex. PerezHilton.com, Gizmodo, TechCrunch)
6%	None of the above (RESPONDENTS COULD NOT SELECT OTHER ANSWERS WITH THIS RESPONSE)



A Closer Look at the Tightly-Woven Web for Women...

54% of women who plan to **connect with family and friends** online also will be **looking up entertainment options in their area** on the Web over the summer.

59% of females who intend to **watch TV or movies** online and **63%** of those who plan to **listen to music** online this summer will also be **playing web-based games**.

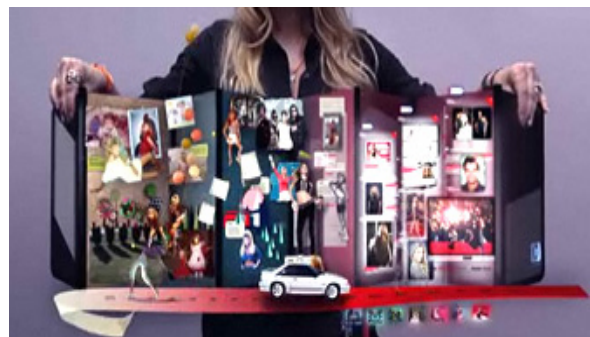
84% of women who plan to use the Web to **shop for sales and compare prices** also intend to **research or book travel online this summer**.



A Closer Look at the Tightly-Woven Web for Women...

While American women indicated they plan to participate in many different online activities this summer, they also selected a number of forums in which to complete those tasks. The following includes the percentages of women selecting the online activities in the first inquiry who were more apt than female survey takers overall to pick the specific website category in this question.

- **Search engines:**
 - Research and plan travel (89%)
 - Shop for sales and compare prices (87%)
 - Look up entertainment options (89%)
 - Follow sports teams or competitions (88%)
 - **Shopping or classified sites:**
 - Shop for sales and compare prices (78%)
 - Research and plan travel (73%)
 - Look up entertainment options (72%)
 - **Social networks/forums:**
 - Look up entertainment options (72%)
 - Connect with friends and family (68%)
 - **News and broadcast news websites:**
 - Follow sports teams or competitions (67%)
 - Keep up with the news (64%)
 - **Travel-specific search engines:**
 - Research and plan travel (63%)
 - Look up entertainment options (45%)
- Of women who indicated they plan to watch television or movies online in the previous inquiry, 49% will visit television, music, or movie aggregators and 48% will go to individual television network or program websites.**



The following chart highlights the cohorts of women who were more likely than female survey takers overall to select the specific types of sites to support their online activities this summer.

Cohorts of women more apt than average to select “ _____ ” as a type of website they are likely to visit this summer		
Search engines (75% overall) <ul style="list-style-type: none"> 18-24 year olds and those age 35-44 (both 80%) Northeasterners (82%) Women with a household income of \$40K-\$50K (81%), \$50K-\$75K (82%), and \$75K+ (81%) College grads (81%) 	Shopping or classified sites (60% overall) <ul style="list-style-type: none"> 18-24 year olds (74%) Those with three or more people or children in the household (both 64%) Americans earning \$40K-\$50K (68%) and \$75K+ (71%) College grads (73%) 	Social networks/forums (60% overall) <ul style="list-style-type: none"> Females age 18-24 (90%) and 25-34 (79%) Those with three or more people or children in the household (both 71%)
News and broadcast news websites (48% overall) <ul style="list-style-type: none"> Older cohorts of women including those age 45-55 (52%), 55-64 (56%), and 65+ (54%) Those earning \$40K-\$50K (55%) and \$75K+ (56%) Women with children age 13-17 in the household (56%) 		Individual television network or show websites (31% overall) <ul style="list-style-type: none"> Those age 25-34 (41%) and 45-54 (40%) Northeasterners (38%) Those earning \$40K-\$50K (38%) Women with kids at home (36%) College graduates (38%)
Travel-specific search engines (31% overall) <ul style="list-style-type: none"> Women age 25-34 (40%) Those earning \$50K-\$75K (42%) and \$75K+ (50%) Women in homes with three or more people (36%) or children (38%) College graduates (41%) 	Television, music, or movie aggregators (30% overall) <ul style="list-style-type: none"> Younger groups of women including those age 18-24 (54%) and 25-34 (48%) Women with a household income of \$75K+ (39%) Females with three or more people in the household (36%) and those with children in the home (37%), especially age 13-17 (41%) College graduates (38%) 	Job boards (25% overall) <ul style="list-style-type: none"> Those age 18-24 (45%), 25-34 (32%), and 35-44 (35%) Those earning less than \$25K (33%) Women in households with three or more people (30%)
Gaming sites (24% overall) <ul style="list-style-type: none"> Younger cohorts of women including those age 18-24 (31%), and 25-34 (29%) Females with a household income of \$25K-\$40K (32%) 	Sports specific sites (15% overall) <ul style="list-style-type: none"> Women age 45-54 (23%) Those earning \$75K+ (27%) Women with children in the household (20%) 	Blogs (13% overall) <ul style="list-style-type: none"> 18-24 year olds and those age 25-34 (both 21%) Residents in the and West (21%) Women earning \$75K+ (20%)

Pick Me, Click Me!

From pop-ups to banner ads to targeted, local listings, Internet users are barraged with an abundance of sponsored online material.

With time a valuable commodity, survey respondents appreciated advertisements that provided an incentives for their interest. Sales offers, discounts and promotion codes were deemed effective by 46% of women. Similarly, more than three-in-ten (31%) would be swayed by the opportunity to submit an entry for a prize, and 7% reported they may be moved by content they could download including wallpapers, ringtones, or video content.

A proportion of women were attracted to ads that involved a social context including those with surveys and other users' opinions (22%), ads featured in social media where user content is welcomed (12%), and ads introducing a Twitter feed (7%).

Nearly one-quarter (24%) focused on listings that included information specific to the local area, while a smaller proportion appreciate the informational value or videos featured on pop-up advertisements (8%). Thirty-eight percent of female respondents abstained from selecting a type of advertisement with which they were more apt to notice or interact online.

- **Sales offers, discounts, or special promotion codes:** There were no statistically significant differences in the selection of this option among Americans of different ages. Women earning \$75K+ (55%) were more apt than average (46%) to value an advertisement with such offers. Those with three or more people in the household (51%) and children in the home (50%) were also more likely than female survey takers overall to respond positively toward discounts or promos.
- **Entry submittal for a chance at a prize:** 25-34 year olds (39%) were more apt than the 31% of female survey takers overall to prefer advertisements with an entry and prize.
- **Includes a survey or quiz with real-time results:** Nearly three-in-ten women age 18-24 (29%) and 31% of those age 55-64 reported their interest in an ad with a survey compared to 22% of females. Women who had completed high school (28%) were also more inclined than survey takers in aggregate to enjoy survey-themed ads.
- **Customized with local information:** Thirty-two percent of females age 18-24 31% of those age 45-54 appreciated this characteristic compared to 24% overall. Women with children in

Which of the following types of online ads are you more likely to notice and/or interact with? Select all that apply. (N=516, ROTATED, ALLOWED MULTIPLE RESPONSES)

An online advertisement that...

46%	Allows you take advantage of sales offers, discounts, or special promotion codes
31%	Allows you to create and submit an entry for a chance to win a prize
24%	Is customized to include your local information, like movie listings in your area
22%	Includes a survey or quiz that allows you to see real-time results from other users or fans
12%	Is featured in a social media or chat format that allows you to ask or share opinions
8%	Is a pop-up or features video with new information and a link to the company website
7%	Offers exclusive downloadable content including wallpapers, ringtones, or movie trailers
7%	Includes a Twitter feed
38%	None of the above (RESPONDENTS COULD NOT SELECT OTHER ANSWERS WITH THIS RESPONSE)



the household were more likely than their childless counterparts to value such advertisements (28% vs. 21%), and especially those with teens age 13-17 (32%).

- **Featured in social media:** Advertisements displayed in social media or chat forums were especially noticed or prized by women in younger age cohorts including those age 18-24 (22%) and 25-34 (17%). Women with three or more individuals (20%) or children (21%) in the household were also predisposed to this.
- **Exclusive downloadable content:** This feature was especially popular with women age 18-24 (16%) as compared to female survey takers in total (7%).



A Closer Look at the Tightly-Woven Web for Women...

The following is a list of the types of online advertisements favored or noticed by women as well as the top categories of websites these individuals plan on visiting this summer, as selected in the previous inquiry.

- **Sales offers, discounts, or special promotion codes:**
 - Blogs (69%)
 - Travel-specific search engines (66%)
 - Individual television network or show websites (64%)
- **Entry submittal and prize:**
 - Blogs (52%)
 - Individual television network or show websites (48%)
 - Travel-specific search engines (47%)
- **Includes a survey or quiz with real-time results:**
 - Blogs (36%)
 - Gaming websites (39%)
 - Job boards (33%)
- **Customized with local information:**
 - Blogs (48%)
 - Individual television network or show websites (45%)
 - Gaming websites (43%)
- **Featured in social media:**
 - Blogs (39%)
 - Gaming websites (27%)
 - Television, music, or movie aggregators (24%)
- **Exclusive downloadable content:**
 - Blogs (26%)
 - Gaming websites (19%)
- **Includes a Twitter feed:**
 - Blogs (29%)



Advertising Categories that Jump Off the Web Page

Appropriate to the category, advertisements for music, movies, or television were deemed the most prevalent or entertaining by a plurality of women (35%), a nod to those who plan to access such content online this summer, as addressed in a previous inquiry. And 33% of Americans had noticed or were favorable toward those advertisements in the food and beverage category, depicted through images, videos, and phrased online.

One-third of women (33%) could recollect an advertisement they had recently seen for health or beauty products, and a similar 30% were familiar with pop-ups or banner ads for fashion products or clothing lines.

More than one-quarter of women (27%) had noticed or enjoyed a travel-themed banner ad or commercial online in the last month, which are easily linked to the travel sites that 31% of females completing online activities this summer plan to use. A smaller proportion – 15% – had noticed a web-based ad for the latest auto model.

Tech ads were top for 17% of women who had viewed or enjoyed an advertisements depicting gadgets, software, or similar products in the past month. Two-in-five ladies (20%) could recall an ad inviting them to display their online gaming skills, an area in which many may be especially attuned as 50% plan on participating in Web games this summer.

Ten percent had zoned in on a sports-themed pop-up or banner ad, perhaps attributable to the recent focus on major tournaments like the Stanley Cup and upcoming World Cup. Just 10% were familiar with an online advertisement featuring professional or business services. Thirty-seven percent of female respondents (37%) refrained from selecting a category in which they had viewed or enjoyed an online advertisement in the past month.

Thinking about the time you have spent online in the last month, what categories of product advertising have you noticed and/or enjoyed? You may select all that apply to you.

(N=516, ROTATED, ALLOWED MULTIPLE RESPONSES)

35%	Entertainment (music, movies, or television)
33%	Food and beverage
33%	Health, beauty or grooming products
30%	Fashion or clothing products
27%	Travel
20%	Gaming
17%	Technology
15%	Automobile
10%	Sports
10%	Professional or business services
37%	None of the above (RESPONDENTS COULD NOT SELECT OTHER ANSWERS WITH THIS RESPONSE)



A Closer Look at the Tightly-Woven Web for Women...

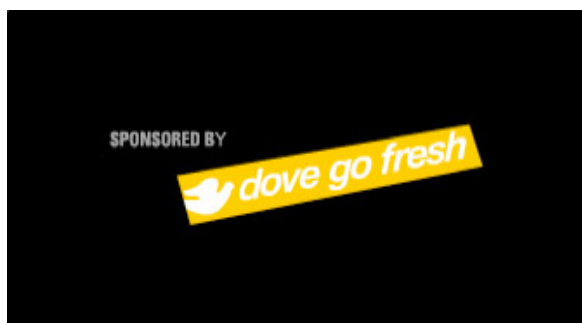
56% of those women who plan to **look up entertainment options** online this summer have noticed or enjoyed an **entertainment-focused advertisement** in the past 30 days, as did 52% who expect to **watch television or movies** and 50% who plan to **listen to music online**.

46% of females who plan to **research or book travel online** this summer have seen a **travel advertisement** in the past month.

42% of women who intend to **play games online** this summer season have noticed or enjoyed a web-based **gaming advertisement** recently.

Demographic Groups of women more inclined than female survey takers overall select “_____” as a category of product advertising they had noticed and/or enjoyed in the past month.

Entertainment (35% overall)	Food and beverage (33% overall)	Health or beauty (33% overall)
<ul style="list-style-type: none"> • Women age 18-24 (53%) and 25-34 (46%) • Northeasterners (43%) • Those earning \$25K-\$40K (44%) • Those with three or more people (41%) or children (44%) in the household 	<ul style="list-style-type: none"> • Those age 18-24 (40%) • Females with three or more or children in the household (both 37%) 	<ul style="list-style-type: none"> • Women age 18-24 (45%) and 45-54 (37%) • Women earning \$25K-\$40K (37%) and \$40K-\$50K (43%) • Those with three or more people (39%) or kids (38%) in the home, especially with kids age 13-17 (44%)
Fashion or clothing (30% overall)	Travel (27% overall)	Gaming (20% overall)
<ul style="list-style-type: none"> • Those age 18-24 (47%) and 25-34 (35%) • Those with three or more or kids in the home (both 34%) 	<ul style="list-style-type: none"> • 18-24 year olds (38%) and those age 45-54 (33%) • Those with an income of \$75K+ (32%) • Female survey takers with three or more (30%) or children (32%) in the home • College graduates (31%) 	<ul style="list-style-type: none"> • 18-24 year olds (33%) • Women with household incomes of less than \$25K (25%) • Those with three or more people (27%) or kids (24%) in the household, especially those age 13-17 (28%) • Women who have attained a high school diploma (31%)
Technology (17% overall)	Automobile (15% overall)	Sports (10% overall)
<ul style="list-style-type: none"> • 18-24 year olds (28%) 	<ul style="list-style-type: none"> • 18-24 year olds (19%) • Those earning \$75K+ (20%) 	<ul style="list-style-type: none"> • 18-24 year olds (19%)



Methodology

On behalf of Unicast, **the polling company™, inc.** conducted an online omnibus survey of 1,000 adults (aged 18+) nationwide. This report and analysis examines the results of the 516 female survey takers. The survey included questions on planned online behaviors for the summer season, as well as reactions to types of web-based advertisements.

The survey was fielded May 27-28, 2010.

Respondents for this survey were selected from an opt-in panel, and had expressed prior consent to participate in online surveys such as this. The demographics of this audience closely match the nationwide population of adults (age 18+) with respect to gender, age, and region.

When sample is based on a self-selected population and not a probability sample (in which everyone in the population has a non-zero chance of being selected), no conclusions can be drawn with respect to sampling error. Like any other traditional telephone survey, online polls are subject to many types of error.

About Unicast

Unicast has been providing state-of-the-art rich media solutions for publishers, agencies and advertisers since 1998. Integrating creative support with campaign management and detailed analytics, Unicast technologies empower customers to manage the complex process of deploying online advertising campaigns. Unicast is a proud member of the DG FastChannel (NASDAQ: DGIT) family of companies -- a multichannel distribution network of thousands of advertisers and media publishers worldwide. Today, our solutions are leveraged globally by some of the world's most esteemed brands, including AOL, Fox Interactive Media, MSN, MindShare, NBC Universal, ABC, CBS, and Initiative Media. For more information visit www.unicast.com and visit our blog, www.unicast.com/blog/.

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