The BlogHer – iVillage 2010 Social Media Matters Study

Co-sponsored by Ketchum and the Nielsen Company

Elisa Camahort Page
BlogHer Co-founder and COO
Elisa@BlogHer.com
408-504-5708
Study objectives

• To size, scale, qualify and compare *media usage* patterns across cross-sections of the population:
  • Gender
  • Generation
  • Blogging focus
  • Media channel preference

• To show the *purchasing behavior* of social media users
  • Bloggers
  • Social Networking
  • Online vs. offline media consumption & influence
Methodology

Samples:
Two data samples collected and compared in March ‘10:
• **U.S. Total Online Population**, survey fielded on **Nielsen Online** panel. Results weighted by age to be representative of US online characteristics
• **BlogHer Network sample**, survey fielded across 2,500 blogs and 20MM+ audience

Age:
• Men and women 18-76, with segmentation for
  • Millenials (18-25)
  • Gen X (26-42)
  • Boomers (43-61)
  • Seniors (62-76)

Size (n)
• US Online, N=1,373 women and 379 men
• BlogHer, N= 1,782 women and 94 men

Survey Design, Methodology and Data Analysis:
• Conducted with consultation from CustomerImpact
Core findings and summary

• BlogHer Network users choose blogs as preferred media source for product purchasing information. Only internet search ranks higher.

• More women on the BlogHer network turn to blogs to find out about new products (59%) vs social networks (20%).

• 77% of the BlogHer Network women also turn to blogs to get information, far more than they turn to social networks (37%).

• BlogHer users are more active with the top social media platforms than the average online woman:
  • 8x more likely to read blogs daily, 7X more likely to Twitter daily and 30% more likely to use Facebook daily.

• Social Media Usage continues to grow:
  73% percent of online adults participate weekly or more often. These “active” social media users turn to social media more often than traditional media sources.
Key Findings: Sizing the Landscape
If size matters, social media is huge in the U.S.

**Size of Social Media Users Online**

*Active social media use defined as 1x weekly or more for Blog reading, writing, commenting or Message Board reading or commenting, Facebook, Twitter, LinkedIn or other social networks*

- **Three Quarters** of the Online Population are Frequent Social Media Users*

  - **163.8 million** = Total U.S. Adult Online Population
  - **87.1 million** = Women online **18-76**

  - **126.9 million*** = Total U.S. Social Media Users
  - **67.5 Million** = Women using Social Media Weekly or more often

  - Social media adoption did not vary by gender: Men participate at the same rate as women

Source: Social Media Matters 2010, BlogHer Inc., Nielsen US Total Online Population sample, N = 1,752; Total online raw numbers based on Nielsen Online @Plan
Third-party source confirms: Social media has grown sharply year over year

Social Networking Sites
(Millions)

Mar-09: 124.4
Mar-10: 186.5

Blogging Sites
(Millions)

Mar-09: 81.9
Mar-10: 124

Source: comScore Media Metrix, US, March 2009 and March 2010
Blogging Activity Skews to the Younger Demographics

Participating in Activity Weekly or More
Responses Calculated to show Percentage by Age Segmentation

Read Blogs

- 30.3% (Gen X 26-42)
- 29.3% (Seniors 62-76)
- 23.1% (Millennial 18-26)
- 17.2% (Boomers 43-61)

One third are 18-25

Write Blogs

- 40.4% (Gen X 26-42)
- 28.1% (Seniors 62-76)
- 18.7% (Boomers 43-61)
- 12.8% (Millennial 18-26)

Nearly one half are 18-25

Source: 2010 Social Media Matters; Blogher Inc.; Nielsen Total US Online population; Read Blogs = 629; Write Blogs = 249
Key Findings: Passion and Motivation
More than half of top ten weekly media destinations (U.S. Total Online and BlogHer) are social media

BlogHer Network users show strongest media activity

BlogHer network users are ahead of the total online population for Twitter consumption

*Social Media Games (e.g. Farmville); Nielsen US Total Online N = 1,752, BlogHer sample N = 1,584
BlogHer Users are More Active on a Daily Basis with the Top Social Media Platforms

- 8X more using blogs daily
- 7X more using Twitter daily
- 28% more using Facebook daily

Women who visit Daily

US. Women Active Users (weekly or more often):
- Read Blogs: 32.4%
- Facebook: 82.6%
- Twitter: 15.1%

Source: 2010 Social Media Matters, BlogHer Inc, Nielsen Total U.S. Online Population N= 1,258; BlogHer Network sample N= 1,550
Reading Blogs Dominates the Attention of BlogHer Network Users

“How often do you engage in the following types of activities”
(Weekly or more: Active Social Media Users)

Source: Social Media Matters 2010, BlogHer Inc., BlogHer Network sample, N = 1,550
What motivates bloggers to write?

It’s Both Personal and Pragmatic

- **Express Myself**: 81.6%
- **For Fun**: 80.6%
- **Connect with Others like Me**: 75.4%
- **Create Personal Record**: 68.2%
- **Give Advice**: 50.9%
- **Earn Money**: 31.6%
- **Persuade Others**: 20.2%

Source: 2010 Social Media Matters, BlogHer Inc, BlogHer Network Sample, N = 912
Key Findings: The BlogHer Demographic
The BlogHer Network demographic landscape

BlogHer Network users are younger, better educated, more affluent

<table>
<thead>
<tr>
<th>Status</th>
<th>U.S. Population</th>
<th>BlogHer Network</th>
<th>BlogHer Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennial (18-24)</td>
<td>10.3%</td>
<td>11.1%</td>
<td>108</td>
</tr>
<tr>
<td>Gen X (26-42)</td>
<td>34.9%</td>
<td>56.3%</td>
<td>161</td>
</tr>
<tr>
<td>Boomers (43-61)</td>
<td>38.2%</td>
<td>26.4%</td>
<td>69</td>
</tr>
<tr>
<td>Seniors (62-76)</td>
<td>16.6%</td>
<td>4.9%</td>
<td>30</td>
</tr>
<tr>
<td>Income &gt;$25K</td>
<td>18.9%</td>
<td>5.8%</td>
<td>31</td>
</tr>
<tr>
<td>Income $50-75K</td>
<td>20.5%</td>
<td>17.6%</td>
<td>86</td>
</tr>
<tr>
<td>Income $125K+</td>
<td>4.2%</td>
<td>12.7%</td>
<td>202</td>
</tr>
<tr>
<td>H.S. Grad or Less</td>
<td>16.6%</td>
<td>5.0%</td>
<td>30</td>
</tr>
<tr>
<td>College Grad</td>
<td>34.7%</td>
<td>39.6%</td>
<td>114</td>
</tr>
<tr>
<td>Post Grad Degree</td>
<td>5.2%</td>
<td>21.5%</td>
<td>313</td>
</tr>
</tbody>
</table>

Source: 2010 Social Media Matters; Blogher Inc.; Nielsen Total US Online population N = 1,752 vs. BlogHer network, N = 1,876
BlogHer audience qualifications are mirrored in other research sources

**BlogHer Audience in Nielsen @ Plan**

- 31% higher than the total online population for Gen X generation
- 21% higher than the total online population for users with upper income $150K+
- 44% more likely for users to have a Post Grad college degree

**BlogHer Audience Size**

**Unique Browsers In Millions**

<table>
<thead>
<tr>
<th></th>
<th>March'09</th>
<th>March'10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>15.6</td>
<td>20.2</td>
</tr>
</tbody>
</table>

Source: Nielsen Online @Plan, Spring 2010; *Nielsen Online Site Census, March 2010
Key Findings: Blogs are a Go-to Resource
Driving purchasing decisions
Women turn to social media for: Advice and Recommendations

“Which of these media destinations do you like to visit for advice and recommendations?”

<table>
<thead>
<tr>
<th>Media Destination</th>
<th>US Population</th>
<th>BlogHer Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blogs</td>
<td>21.0%</td>
<td>63.0%</td>
</tr>
<tr>
<td>Social Networks</td>
<td>26.0%</td>
<td>37.0%</td>
</tr>
</tbody>
</table>

Source: 2010 Social Media Matters, BlogHer Inc., N=1,046, Nielsen Total US Online, N = 887
Women turn to social media to:
Get Information

“Which of these media destinations do you like to visit to get information?”

- **Blogs**
  - US Population: 27.0%
  - BlogHer Network: 77.0%

- **Social Networks**
  - US Population: 34.0%
  - BlogHer Network: 37.0%

Source: 2010 Social Media Matters, BlogHer Inc., N=1,046, Nielsen Total US Online N = 887
Women prefer blogs vs. social networks to find out about new products

“Which online sources are best suited to find out about new products”?

Source: 2010 Social Media Matters, BlogHer Inc., N=1,046, Nielsen Total US Online N = 887
BlogHer Network users choose blogs as preferred media source for product purchasing information

“How often do you turn to each of the following resources to provide you with information that will help with a purchasing decision?”

Among Ad Supported Media

<table>
<thead>
<tr>
<th>Resource</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Search</td>
<td>92%</td>
</tr>
<tr>
<td>Blogs</td>
<td>53%</td>
</tr>
<tr>
<td>User Generated</td>
<td>46%</td>
</tr>
<tr>
<td>Message Boards</td>
<td>34%</td>
</tr>
<tr>
<td>Social Networks</td>
<td>26%</td>
</tr>
<tr>
<td>Magazines</td>
<td>20%</td>
</tr>
<tr>
<td>TV</td>
<td>13%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>10%</td>
</tr>
</tbody>
</table>

*Top Two Box: “All the Time and Frequently”

Source: Social Media Matters 2010, BlogHer Inc., BlogHer Network sample, N = 1,085
* User generated reviews, e.g. Yelp
New Media is Influencing Younger User Purchasing Decisions

“Thinking about the products and services you buy, how influential are each of the following resources on your purchasing decision?”*

*Top Two Box: “Very and Somewhat Influential”

Source: Social Media Matters 2010, BlogHer Inc., Nielsen US Online N = 1,722; BlogHer Network sample, N =1,082
BlogHer Network users use Social Networks but prefer Blogs for almost every purpose

- Blogs are used for entertainment (153 Index), research, purchasing decisions (215 index)
- Blogs are 2X more likely to be used to find new trends and ideas
- Social Networks are great for keeping up with friends and family (Index 150)

“For each of the categories below, which online source is best suited for your purposes?”

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Blogs</th>
<th>Social Networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>78%</td>
<td>51%</td>
</tr>
<tr>
<td>Finding new trends or ideas</td>
<td>61%</td>
<td>30%</td>
</tr>
<tr>
<td>Ideas to manage my house</td>
<td>56%</td>
<td>11%</td>
</tr>
<tr>
<td>Find out about new products</td>
<td>55%</td>
<td>20%</td>
</tr>
<tr>
<td>Help develop new skills</td>
<td>51%</td>
<td>10%</td>
</tr>
<tr>
<td>Keep up with friends and family</td>
<td>48%</td>
<td>72%</td>
</tr>
<tr>
<td>Help solve a problem</td>
<td>44%</td>
<td>27%</td>
</tr>
<tr>
<td>Make a purchase decision</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Help parent more effectively</td>
<td>38%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: 2010 Social Media Matters, BlogHer Inc, BlogHer Network sample, N = 1,234