

2009 Women and Social Media Study by BlogHer, iVillage and Compass Partners

Susan Wright
Managing Director

www.compasspartners-llc.com

Elisa Camahort Page
Co-Founder and COO

<http://blogher.com>



The community for women who blog
You say it. We share it.

Executive Summary

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Research Objectives

1. Deliver definitive, independent data that provides a market view of current dynamics and trends among U.S. women online
2. Measure and define the participation of women across social media, focusing on bloggers and their impact
3. Distinguish the behavior of women participating in four social media activities: Blogs, message boards/forums, status updates (e.g. Twitter) and social networks (e.g. Facebook, MySpace)
 - Insights into usage, habits and attitudes
 - Develop profiles
 - Separate bloggers from social networks and status updating (e.g. Twitter)
4. Quantify the influence women who use social media wield on purchasing and decision making of products and services

For specific questions on the study, please contact Susan Wright: susan@compasspartners-llc.com

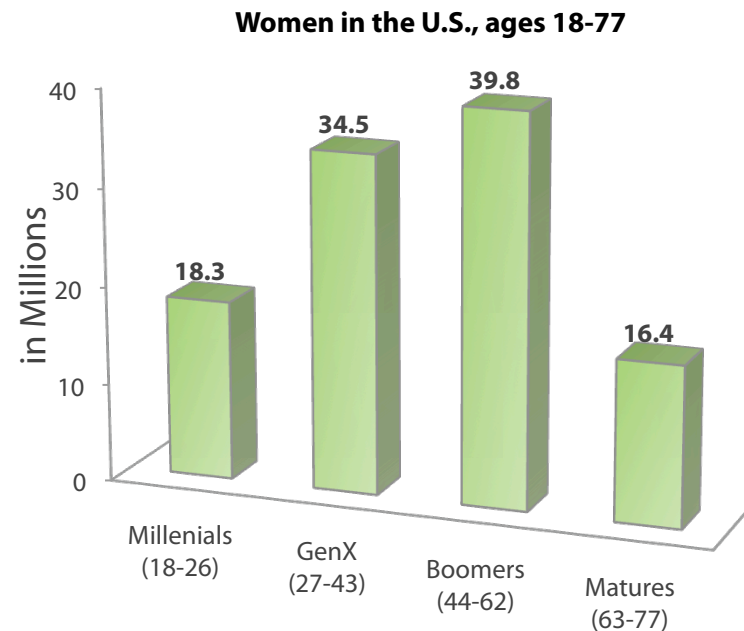
For the detailed, in-depth report please contact Gina Garrubbo Gina@BlogHer.com or Susan Wright: susan@compasspartners-llc.com

Methodology

- This study was designed to compare two samples of users:
 - General population sample: Objective view of what is happening in the market
 - BlogHer network sample: Understand community's position in overall market
 - Data is comparative. Responses from samples were not combined.
- Audience: Women aged 18 – 77 years
 - General population data is weighted by key age breaks to be representative
 - Blogosphere sizing includes calibration for U.S. internet penetration (72.5%)
- Sample size (n): This survey was fielded with three samples
 - General Population online panel sample (n = 2,821)
 - Users who participate at least weekly or more often sample (n = 1,505)
 - Margin of error at 95% confidence = +/- 3.0%
 - BlogHer network intercept sample (n = 1,008)
 - Margin of error at 95% confidence = +/- 3.0%
 - iVillage website intercept sample (n = 788; not covered in this report)
 - Margin of error at 95% confidence = +/- 3.5%
- Market: U.S.
- Date: This study was conducted in March 2009

Sizing the Social Media World for U.S. Women

- First we took an online sample representative of the female U.S. internet population
- Second we asked 2,821 women which online social media activities they participate in
- Third we weighted women's responses by key demographic age breaks to be representative of the female Internet population
- Fourth we focused on women who use social media weekly or more frequently



Market Assumptions:

- 109 million women in the U.S. aged 18-77 years*
- U.S. Internet penetration = 72.5%**
- 79 million women online in the U.S. aged 18-77 years

Sources:

*U.S. National Census Data Projections, Feb. 2009

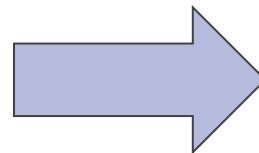
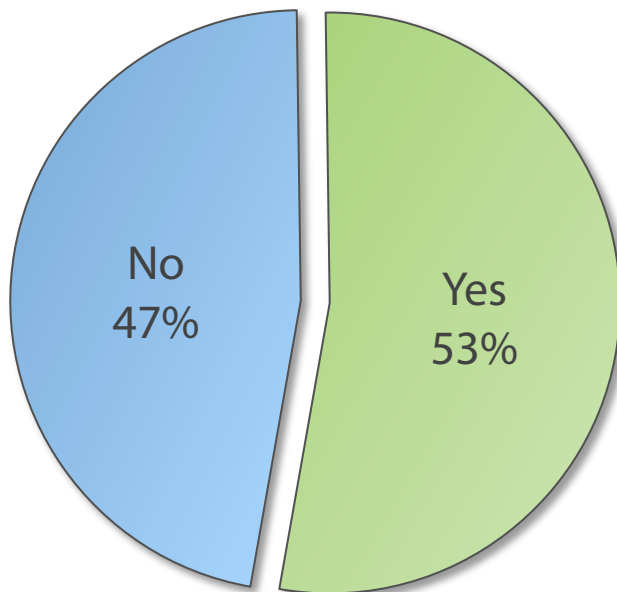
**A.C. Nielsen, Internet Net Statistics, Dec. 2008

Sizing the Social Media World for Active U.S. Women

- More than half of women surveyed who do any “social media” activity participate daily, 2-3 times per week, and weekly
- The remainder of this report is only about this 53% of women who participate weekly or more

Do you participate in the Social Media space at least weekly?

Read, or Post, or Publish Blogs, Message Boards, Social Networks, Status Updating



Included in study

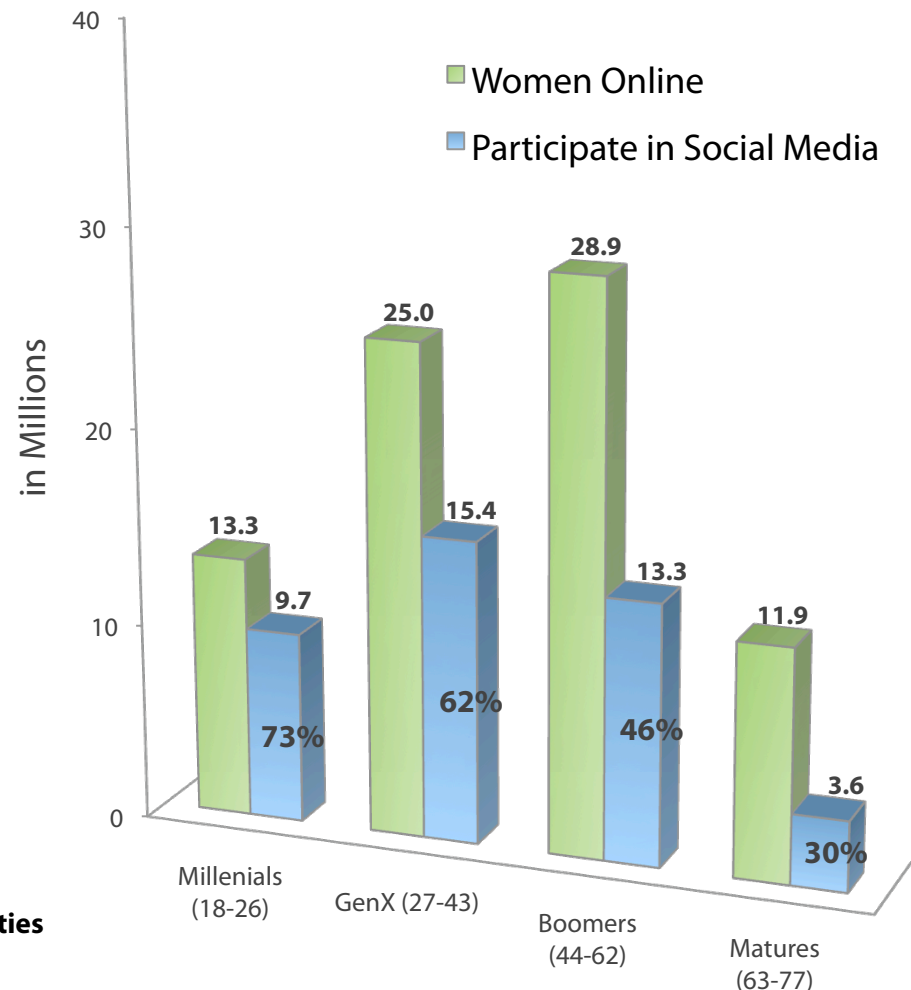


U.S. Female Internet Population
79 million

U.S. Female Active Social Media User Population
42 million

Participation by Active U.S. Women in Social Media by Age Group

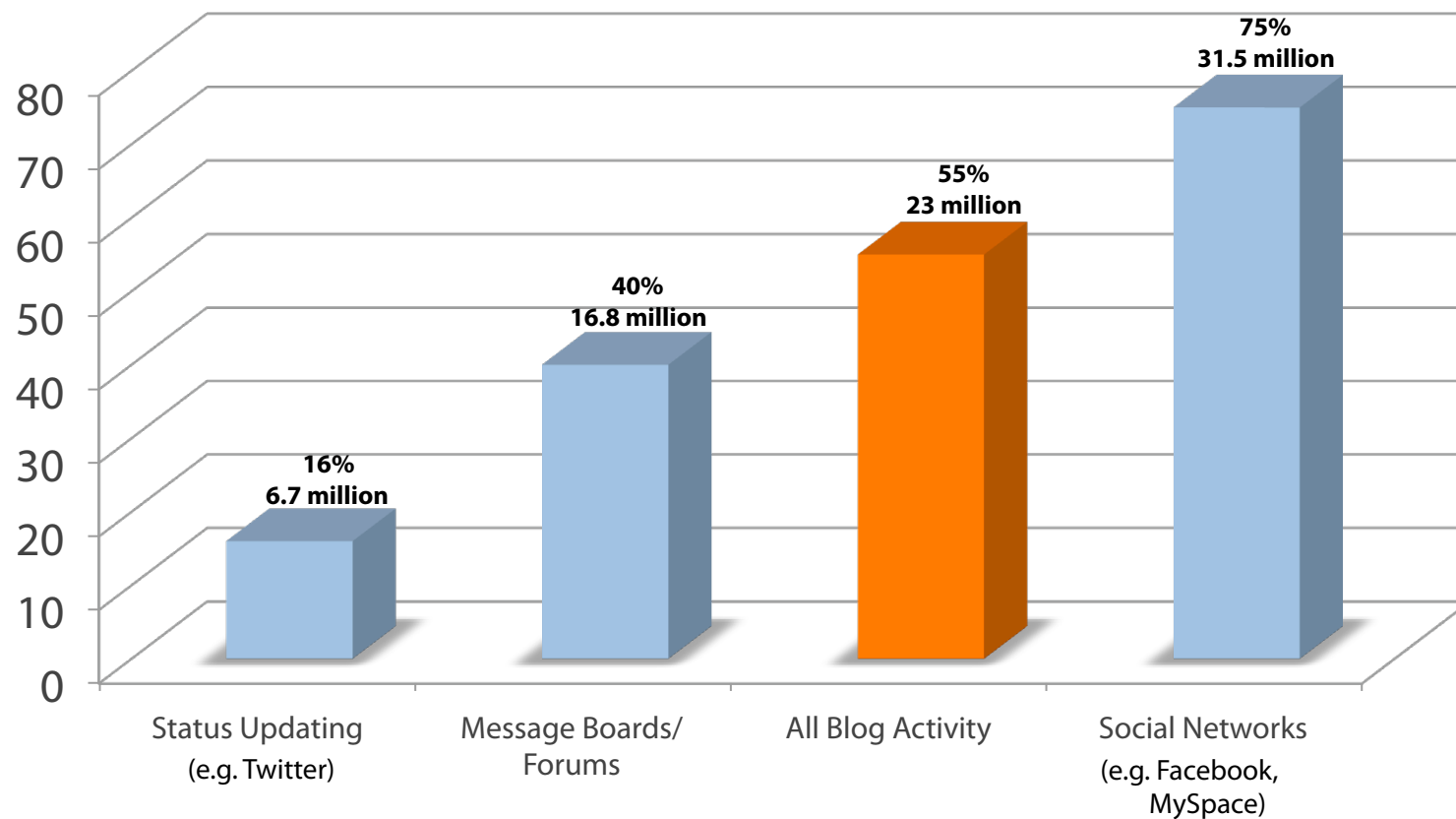
- 79 million U.S. women online
- **42 million U.S. women online weekly doing some form of social media activity**
- Activities definition =
 - ✓ Social networks (e.g. Facebook, MySpace)
 - ✓ Blogging
 - ✓ Reading blogs
 - ✓ Posting to blogs
 - ✓ Message boards & forums
 - ✓ Status Updating (e.g. Twitter)



Definitions:

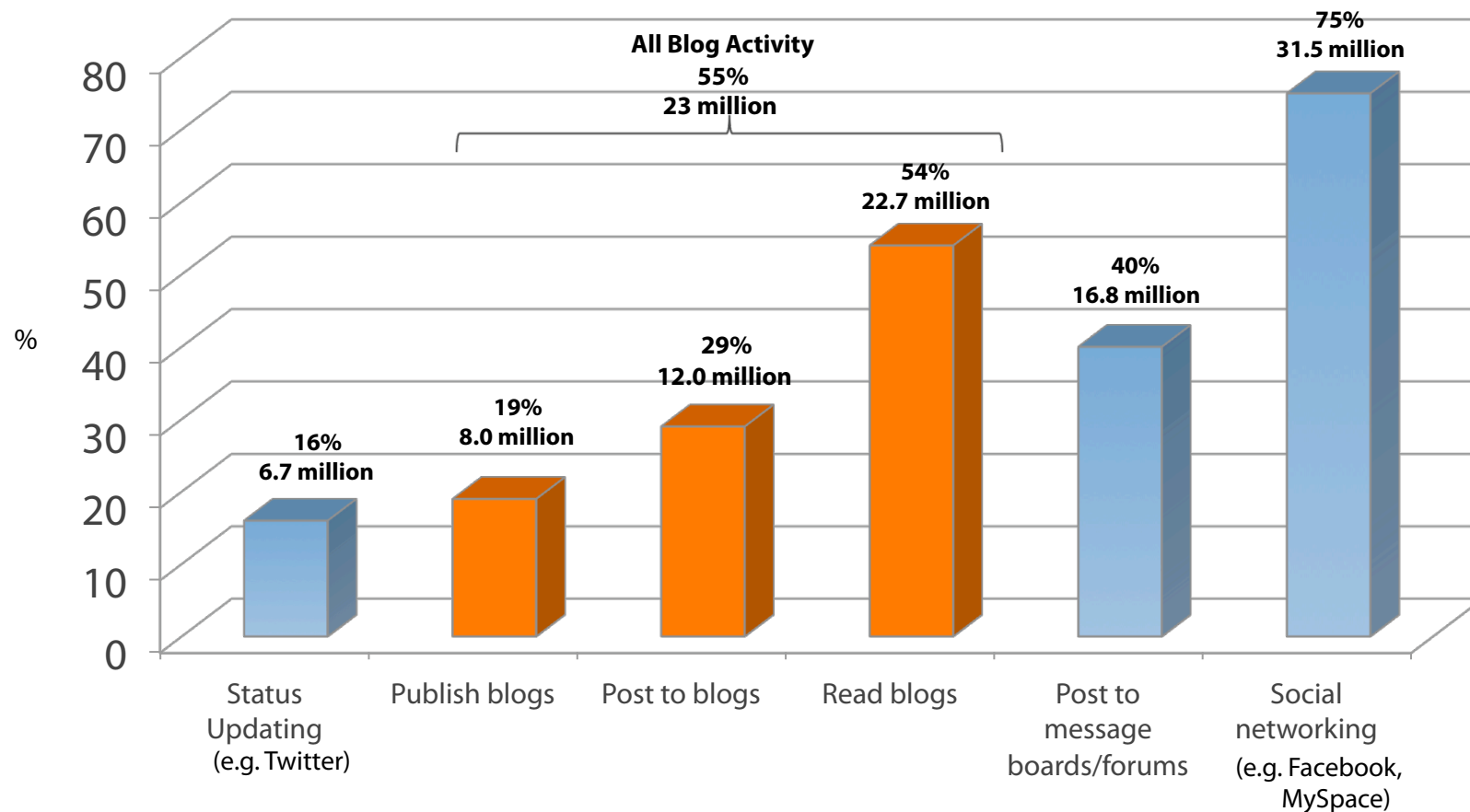
Participate in any of the following social media activities Daily, 2-3 times/week or weekly

Weekly Participation by Women by Social Media Activity



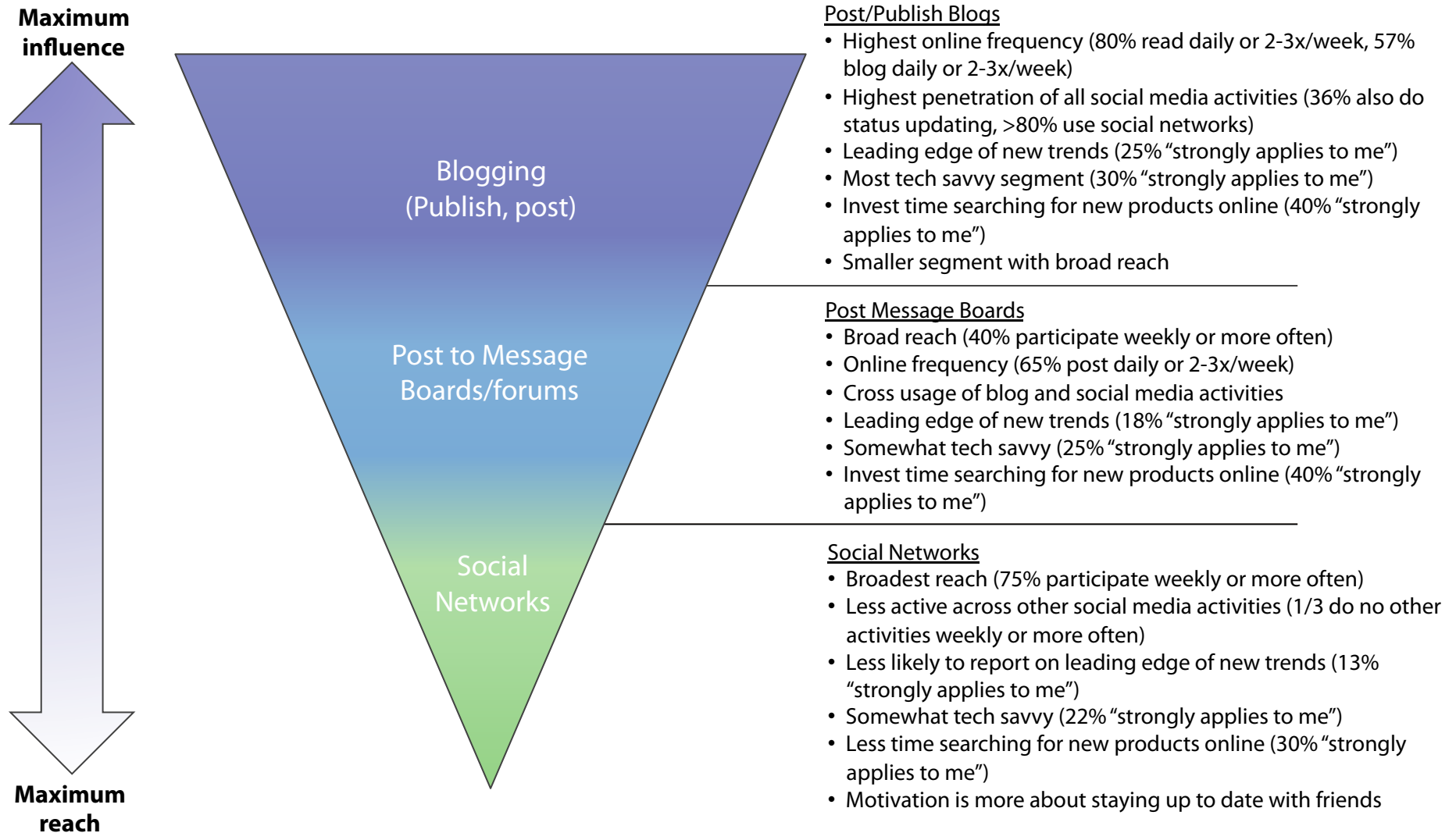
* Activities are not mutually exclusive

Detail: Power of blogging as a Social Media Activity



* Activities are not mutually exclusive

Influence, Reach of Social Media with Women



Many Women are using Multiple Social Media

- There is a high degree of overlap among social media activities by women
- Women who blog are significantly more active across all forms of social media
- 1/3 of women who do social networking do no other social media activities on a weekly basis

		Cross Usage (Daily, 2-3 times/week or weekly)					
	Total Participation	Read Blogs	Write Blogs	Post Comments to Blog	Post Comments to Message Boards & Forums	Status Update	Social Networking
n=	1505	793	312	453	603	266	1186
Read Blogs	54%	100.0%	84.9%	90.3%	67.0%	71.1%	47.4%
Write blogs	19%	33.4%	100.0%	51.9%	36.3%	42.9%	22.6%
Post Comments to Blog	29%	51.6%	75.3%	100.0%	52.1%	54.9%	30.8%
Message Boards & Forums	40%	50.9%	70.2%	69.3%	100.0%	57.1%	39.0%
Status Update	16%	23.8%	36.5%	32.2%	25.2%	100.0%	19.9%
Social Networking	75%	70.9%	85.9%	80.6%	76.6%	88.7%	100.0%

Demographic Profile

Base: Those that participate in any social media compared to Post/Publish, weekly or more often, Gen Pop sample

Demographics	Any Social Media General Population (n=1,505)	Publish/Post Blog General Population (n=830)	BlogHer Network Publish/Post (n=1,008)		compared to Post/Publish, weekly or more often, Gen Pop sample
Married/Living together	60%	57%	82%		Married (index 144)
# in HHD	3.1	3.2	3.4		
Have children at home	44%	51%	67%		Kids (index 131)
Employed fulltime	27%	27%	38%		
Education					
High school graduate or less	23%	21%	4%		70% have completed college (index 229)
Technical or trade school graduate	6%	6%	3%		
Some college/university	38%	42%	23%		
Graduated from college/university	22%	21%	41%		
Some post-graduate work	4%	4%	9%		
Masters or doctorate degree	7%	6%	21%		
Income					
Under \$25,000	23%	24%	7%		Approx half >\$75k/yr (index 230)
\$25,000-\$34,999	15%	17%	8%		
\$35,000-\$49,999	20%	18%	15%		
\$50,000-\$74,999	20%	21%	25%		
\$75,000-\$99,999	11%	9%	19%		
\$100,000-\$124,999	6%	6%	13%		
Greater than \$125,000	5%	5%	14%		

Women are Shifting Time to Social Media

- Time spent participating in the social media is shifting the media landscape
- Shift away from traditional media continues to increase

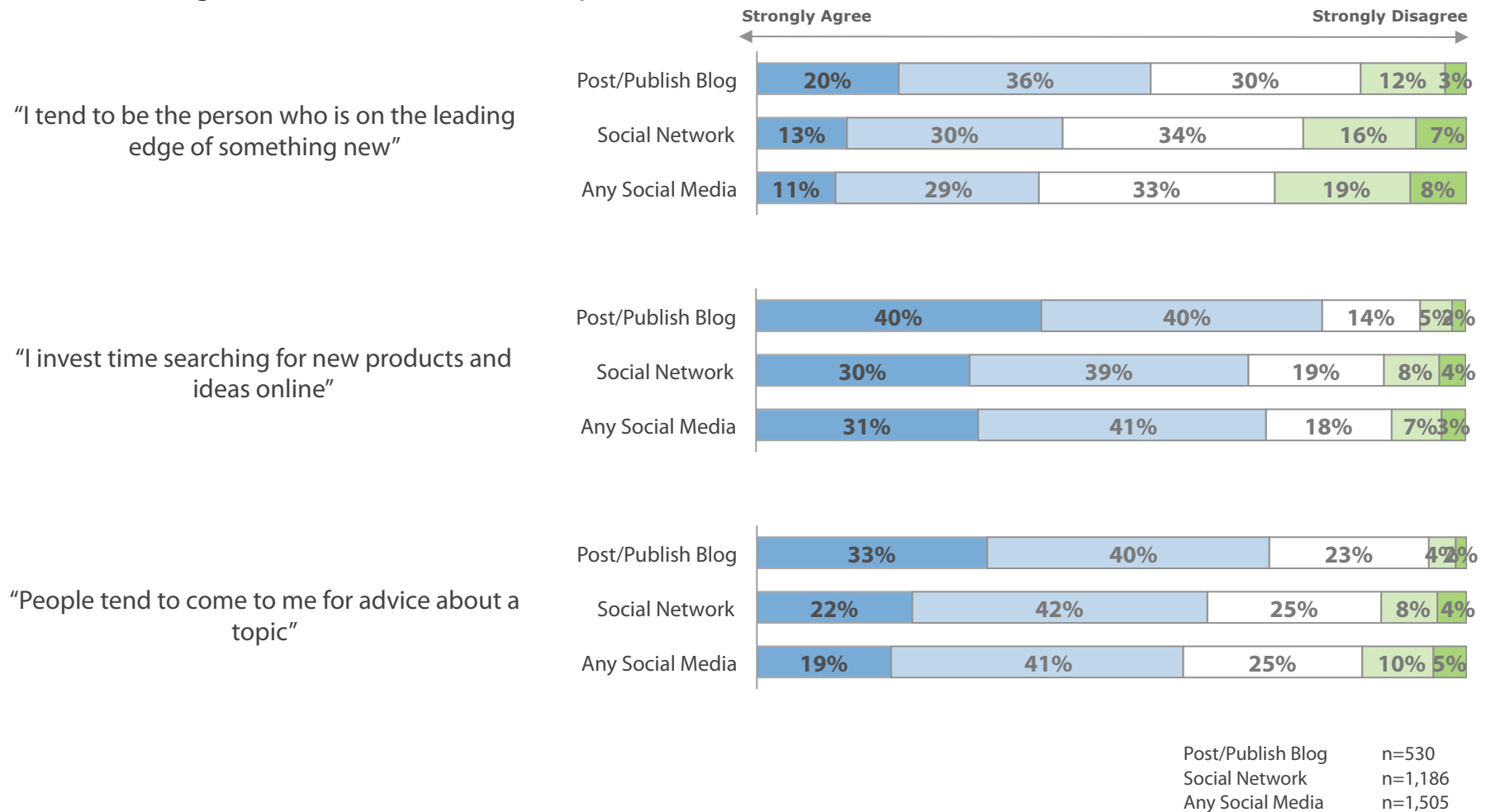
Activity “Are you spending more, less or the same time on these media?”	BlogHer Less Time '09 (%)	General Population Less Time '09 (%)	General Population Less Time '08 (%)
Reading newspapers	57%	39%	22%
Reading magazines	44%	36%	25%
Listening to radio	36%	31%	20%
Watching TV	53%	30%	24%
Talking on the phone	39%	28%	N/A
Message boards and forums	31%	25%	N/A
Meeting with people in person	23%	19%	12%
Visiting traditional websites	16%	6%	12%

n = 1,505 gen pop total weighted

Base: Those that participate in any social media weekly or more often, Gen Pop sample

Attitudes

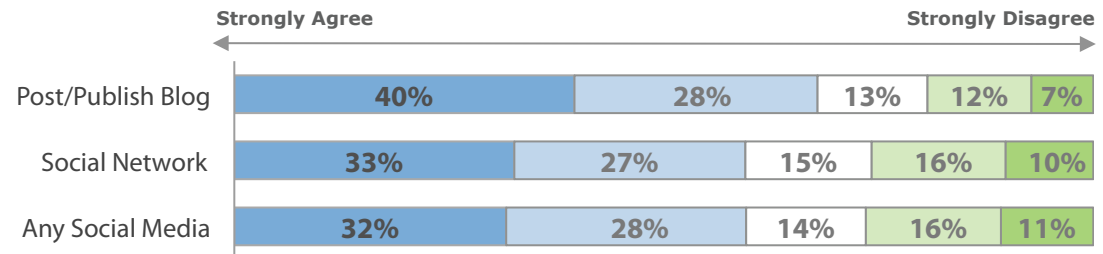
- Women who post and publish blogs report being more engaged in the social media space. When asked "How much do you agree or disagree with the following statements?" women responded:



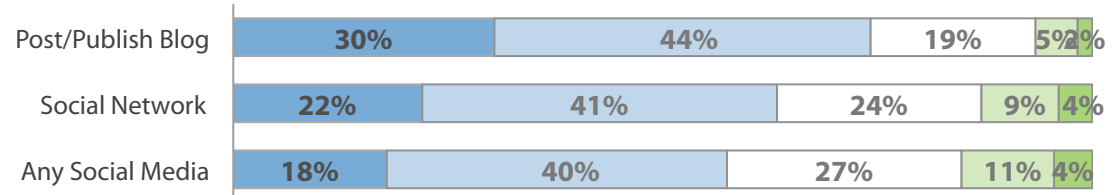
Base: Those that participate in any social media weekly or more often, Gen Pop sample

Attitudes (cont.)

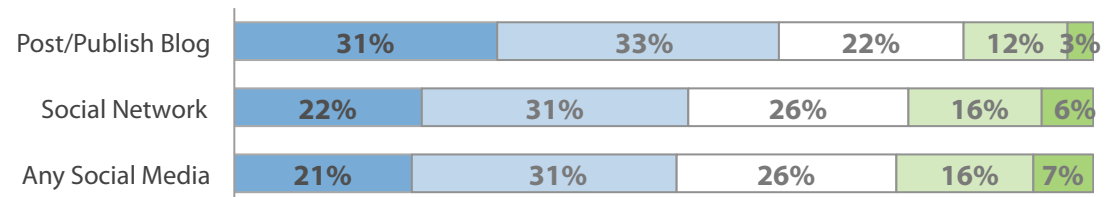
"I can't stand to be offline for even a day"



"I consider myself technically savvy"



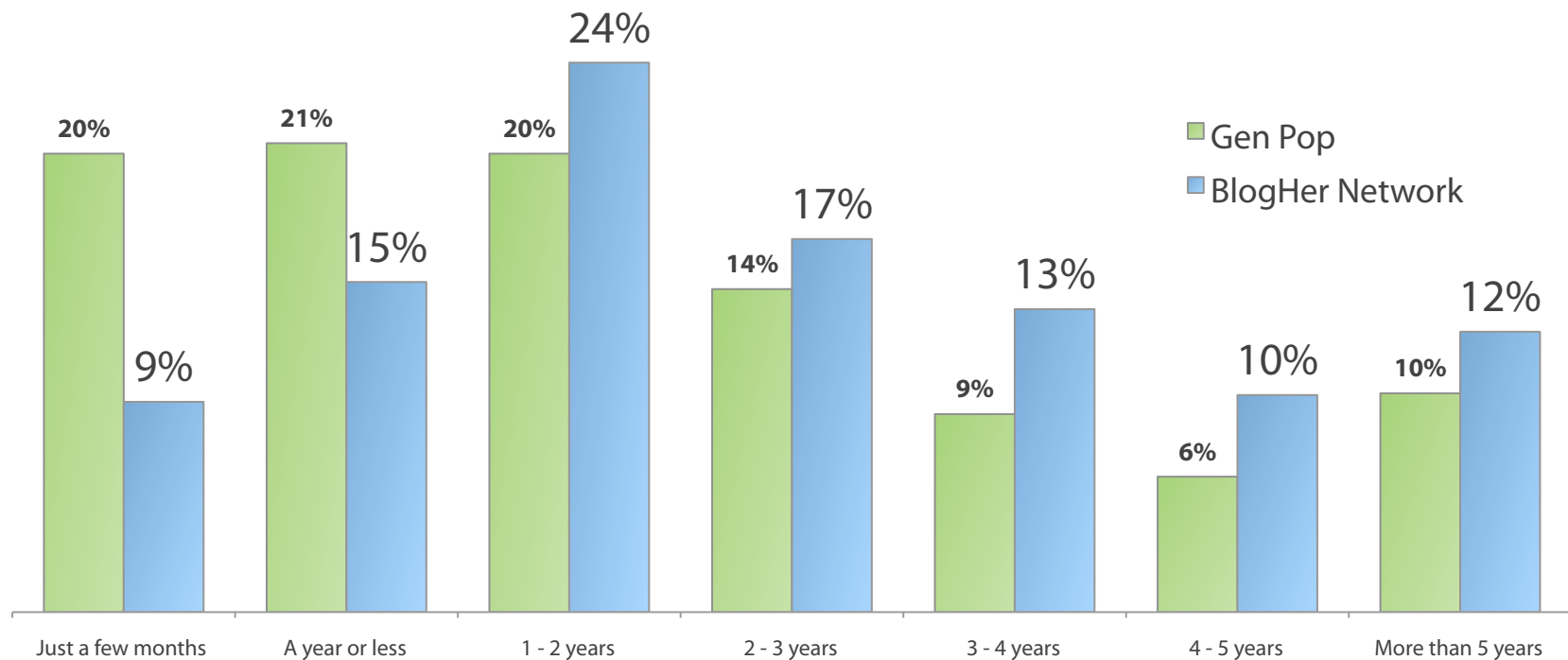
"Connections and friendships I form online are just as meaningful as relationships I form in person"



Post/Publish Blog n=530
Social Network n=1,186
Any Social Media n=1,505

Blog Publishers – Length of Time Writing Blogs

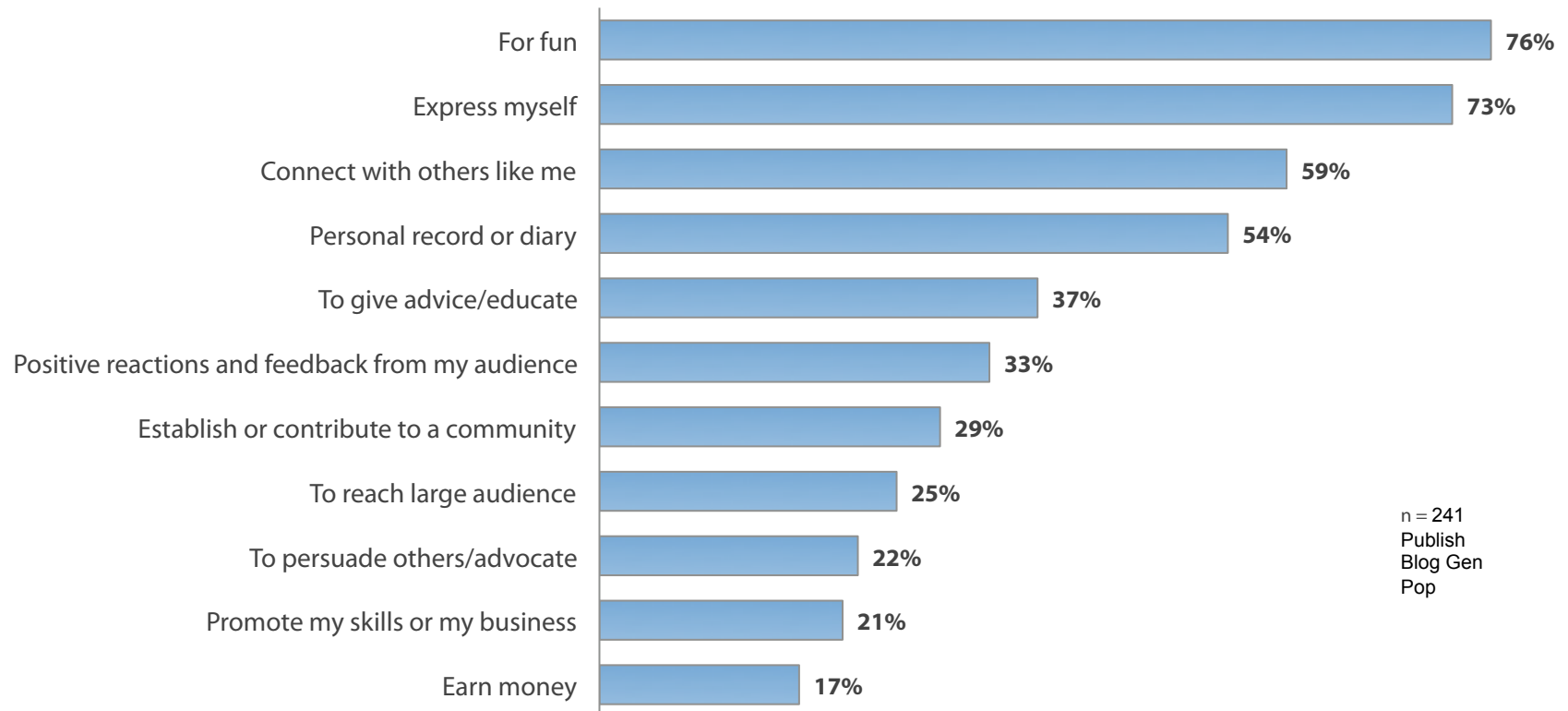
- There continue to be a tremendous influx of new bloggers coming into the blogosphere
- Women in the BlogHer Network have been blogging longer than those in the general social media population
- When asked “How long have you been blogging?” women responded:



n = 217 Gen Pop
n = 701 BlogHer

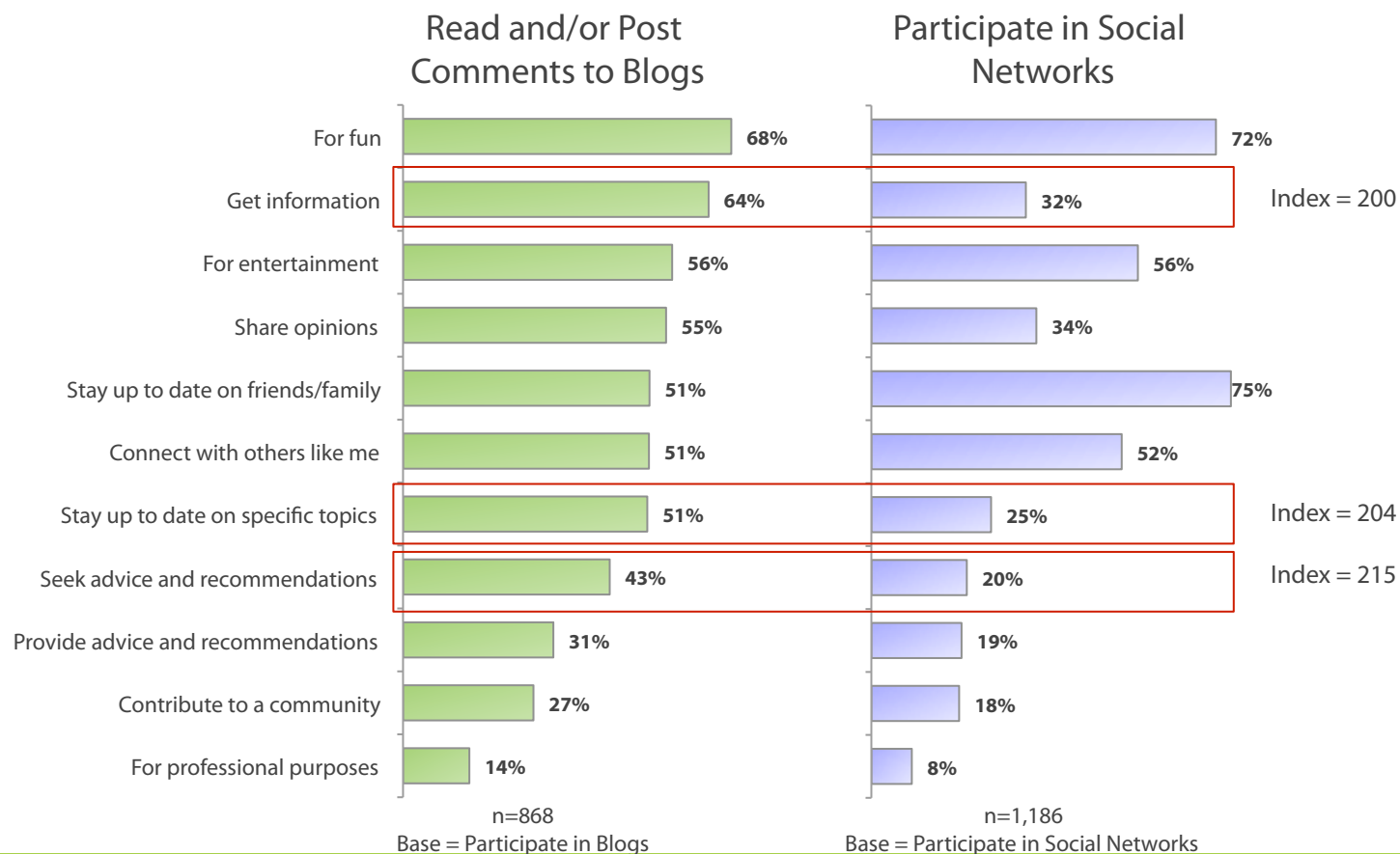
Motivation to Publish Blogs

- Blogging is fun and provides a means to express oneself and “connect with others like me”
- The motivations of women in the BlogHer community are nearly identical to those of the General Population sample
- When asked, “How well does each of the following describe your motivation to blog?” women responded:



Motivation to Participate

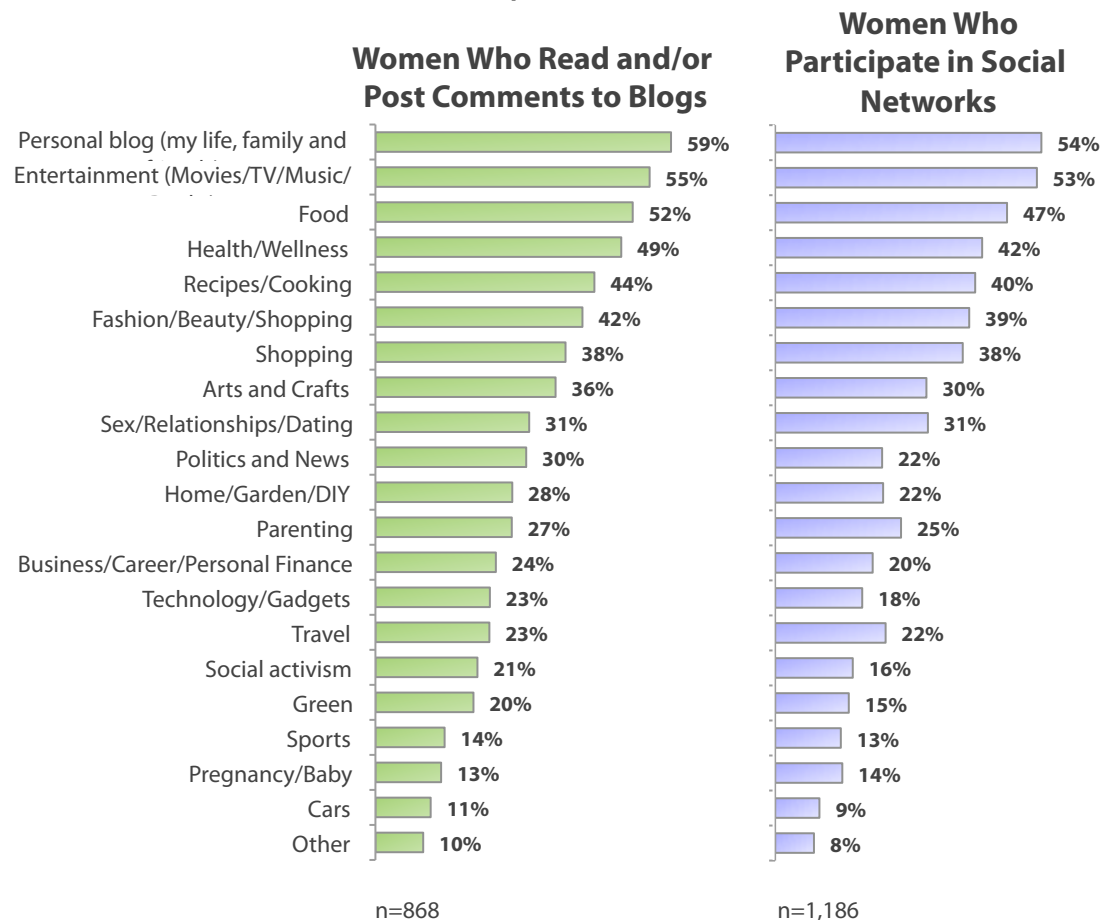
- Women who blog and who participate in social networks share core motivations to “have fun, entertain and connect with others like me”
- Blog content is almost 2x as likely to be used to get information, stay informed on specific topics and seek advice and recommendations
- Social networks are used to stay up to date on friends and family



Topics of Interest

- Women who participate in these activities have similar topics of interest across sources
- When asked, “Which topics do you like to read about and/or post comments about online?” women responded:

Base: Those that participate in any blog activity compared to social media activity, weekly or more often, Gen Pop sample



Source for Topics of Interest

- When asked, “Which sources do you rely on for information on the topics you’re interested in?” women responded:

Base: Those that participate in any blog activity compared to social media activity, weekly or more often, Gen Pop sample

Topic (% who rely on source for topic)	Blogs	Social Networks	Index
Politics and News	59.5	37.3	160
Technology/Gadgets	61.0	39.0	156
Cars	41.3	26.8	154
Business/Career/Personal Finance	52.7	35.6	148
Green	57.1	39.5	145
Health/Wellness	46.3	33.6	138
Pregnancy/Baby	55.2	43.1	128
Arts and Crafts	48.6	38.6	126
Home & Garden	46.4	37.0	125
Food	44.4	39.4	113
Travel	53.4	47.7	112
Parenting	49.4	46.1	107
Sports	46.3	43.8	106
Social activism	65.2	61.4	106
Recipes/Cooking	44.4	42.1	105
Fashion/Beauty/Shopping	44.1	46.4	95
Entertainment (Movies/TV/Music/Books)	48.2	56.1	86
Shopping	39.5	49.9	79
Sex/Relationships/Dating	45.5	59.0	77

n = varies per topic

Impact of the Economy

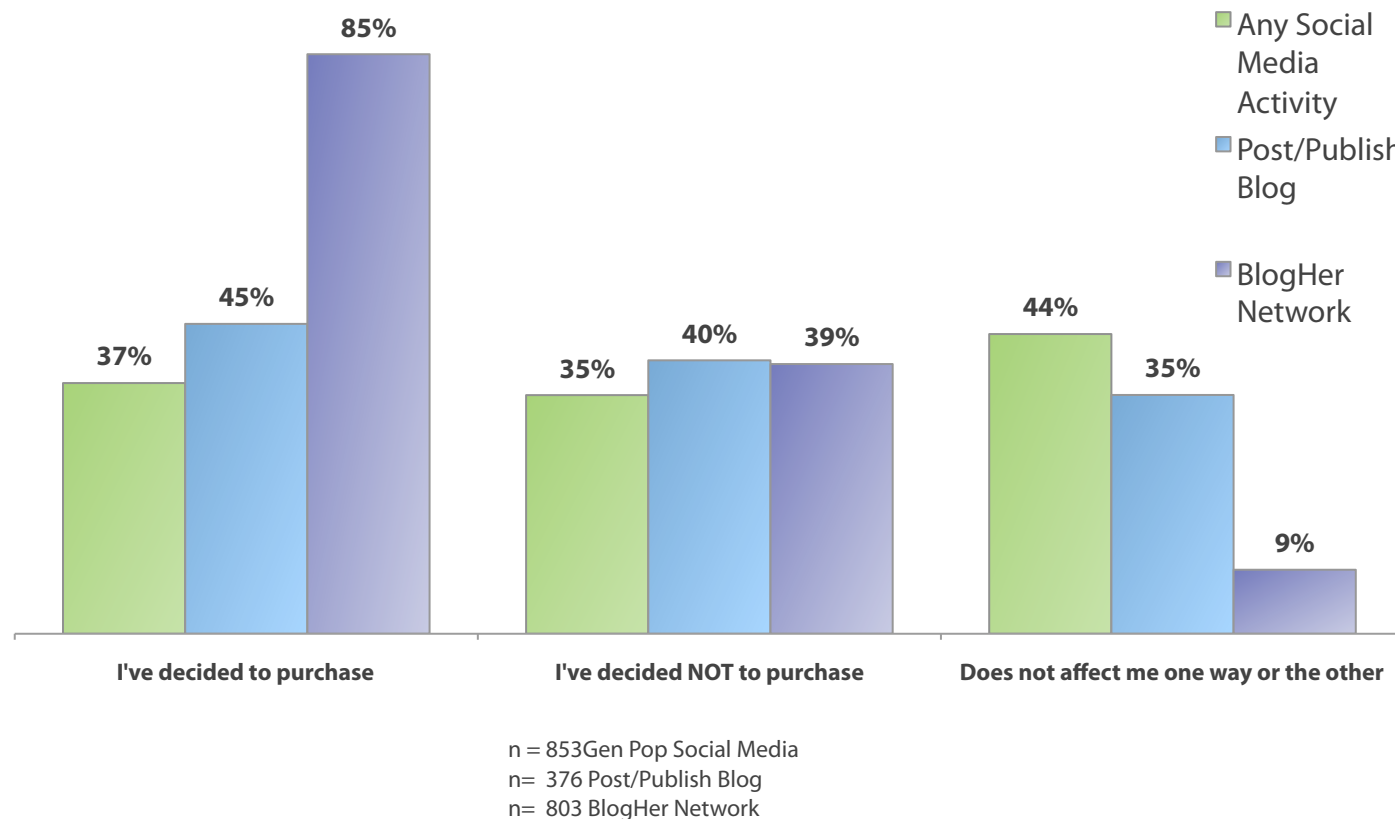
When asked “How has the economy affected your buying behavior?” women responded:

- The economy is top of mind for women online
 - 78% are considering purchases more carefully
 - 73% are spending less overall
- The Internet is a valuable economic resource
 - 62% are comparing prices online more often
 - 48% are spending more time online researching purchases
 - 25% are trying to to buy from “companies I know”

Total weighted n=1,454

Purchase Decision Influence – Blogs

- Women report they are significantly more likely to make a purchase decision based on customer experiences reported on blogs
- When asked, “Have you made a purchasing decision as a result of a recommendation or customer experience posted on ...blog?” women responded:



The State of the Social Media World

- Scale: Continuing mainstream adoption of social media and blogs
- Influence: Blogs are go-to social media source for information, advice and recommendations
- Media Shift: Social media continues to supplant traditional media
- Women Bloggers: Most engaged, leading edge of social media users



Appendix

Online Media Habits by Age

- Includes all users, including users less frequent than weekly
- Online media participation rates decline with increasing age
- Rates highest among Millennials and Generation X, the “digital natives”

Social Media Activities Measured	“Which of the following types of online media activities do you engage in?”	Total % (18-77 yrs) n= 2,2821	Millennials % (18-26 yrs) n= 587	Generation X % (27-43 yrs) n= 817	Boomers % (44-62 yrs) n=934	Matures % (63-77 yrs) n=448
	Social networking (e.g. Facebook, MySpace)	53	83	65	41	25
	Reading blogs	38	50	44	34	22
	Posting comments to a blog	32	46	37	27	17
	Writing/updated blogs	25	41	29	19	12
	Posting comments to message boards and forums	32	46	37	27	17
	Status updating (e.g. Twitter)	12	25	15	8	3
	Shopping online	74	68	75	77	72
	Researching products and services online	66	56	67	69	67
	Sharing digital photos online	48	63	57	41	30
	Instant Messenger	47	68	50	41	32
	Watching video, TV, and movies online	45	74	53	34	20
	Downloading digital music	34	62	45	23	7
	Sharing video online	20	29	20	14	12
	Viewing/Listening to podcasts	13	16	15	13	5

Q.8 Which of the following types of online media activities do you engage in? Select all that apply.