

Consumer Generated Media - Separating Hype from Reality

A new market study from Nielsen Online

Consumer Generated Media has been a hot topic for the online industry for the past two years – but who really has a **thorough understanding** of its component categories, of what really **drives consumers** to share, comment on and contribute content, and **what does this exploding area of online content really mean for publishers, agencies and brands?**

This new study from Nielsen Online finally sheds light on the who, what, when, why and how of CGM in the Australian and New Zealand markets. The report explores and defines the sub categories of CGM, such as blogging, podcasting, social networking, forums, tagging, and general content sharing, to measure not just active contribution but also passive consumption of CGM and what this means for advertisers, publishers and the category, overall.

Sample of NZ Report Findings:

- 49% of online New Zealanders have created an online profile within the past year; 17% created a blog, while over 61% posted pictures, and slightly less than 6% “tagged” something online
- 25% of online profile owners first created their profile within the past 3 months, signaling a recent surge in this type of online behaviour – this trend should continue with a further 23% of social networking users expecting to have more online profiles next year
- In terms of social networking behaviour, 42% of online profile owners/views have looked for job on a social network site, 27% have looked for a car and 17% have sought out someone to date

The report provides subscribers with insight into:

- The size of the market and where it's headed
- Which consumers are participating in or 'consuming' CGM
- CGM patterns of usage – access points, time spent, time of day and frequency of use
- The drivers and barriers to participation in the category
- To what extent consumers are talking about brands, products or companies online, on which sites, what type of content and what impact does this brand 'buzz' have on them?
- How consumers feel about the increasing commercialisation of the CGM space and what effect this will ultimately have

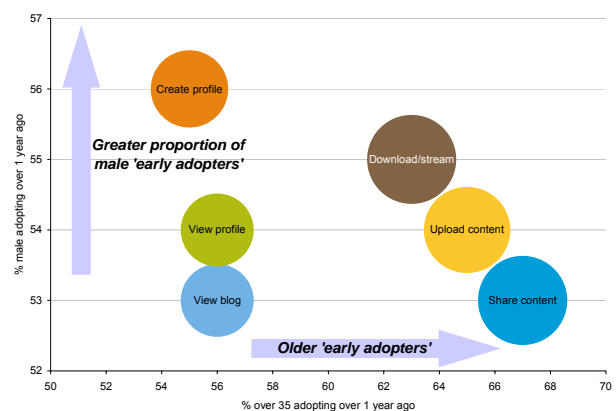
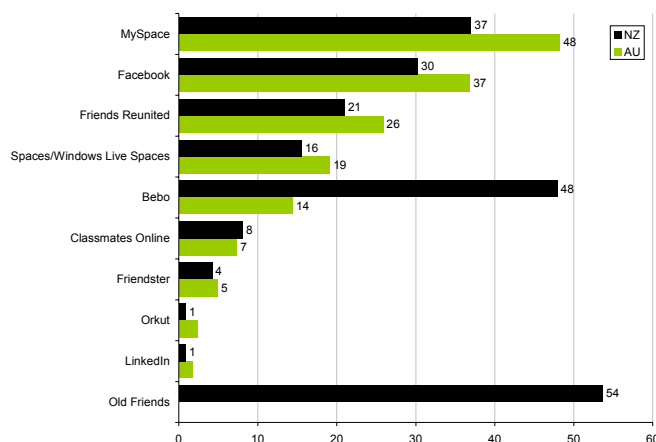
Site-specific analysis

- What are the dominant sites in the category?
- What growth have they seen and what can we expect?
- What is the mix between local vs overseas content and what is preferred?
- What niche sites and offerings are coming into play and why?
- What are users' perceptions of key sites and services?

Subscribers will receive a detailed, 145 page written report inclusive of graphs, tables and diagrams. The survey findings are complemented and enhanced by analysis of actual CGM behaviour using Nielsen Online NetView and Market Intelligence behavioural data for consumer new media activities; together with commentary and market insight provided by Nielsen Online analysts.

All demographic segments are consistent with New Zealand Nielsen Online Market Intelligence data, to facilitate an extension of MI analysis across a broader range of CGM sites such as YouTube, Bebo, Facebook, MySpace, Blogger, Wikipedia and Flickr – to name just a few.

Sample Charts



The report is valuable for:

- Decision making about the way CGM can fit into your online strategies and tactics
- Gauging whether online 'buzz' may be having an effect on brands and products and how to tap into this growing area of word of mouth marketing and communication
- Publishers with CGM tools and services, to understand uptake, user expectations and desires
- Anyone wishing to better understand the opportunities associated with this explosive area of online content and its future direction

Research Approach

The research draws from both a **survey methodology**, capturing reported behaviour, attitudes and future intentions, and **analysis of actual CGM behaviour** using Nielsen Online NetView, and complimentary Market Intelligence data.

An online survey was used for data collection, and all respondents were invited to participate via email. The survey was programmed to deliver an efficient experience for respondents, using skip patterns and functionality to present them with only relevant questions and response codes. All responses were gathered between 19th November and 4th December, 2007.



A national sample was collected, representative of the Australian and New Zealand online populations (aged 18 and above) based on the latest national census data. The total sample captured for the study was n=2589 in Australia and n=2059 in New Zealand.

In order to include a small sample of 14 to 17 year olds in each market, adult respondents with children within this age range were asked permission to invite each child to participate in the survey. Nielsen Online then sent the survey invitation to these 14 to 17 year olds.

Cost: \$3,995 (Excl GST)

For more information about the report please contact Nielsen Online Senior Analyst Tony Boyte on 09 970 4143 or your Account Manager.