CivicScience Insight Report

Who is the Snapchat User? Profiling the Snapchat Fan.

Just last year, disappearing-messaging app provider Snapchat turned down Facebook's $3 billion buyout offer, and now the company is again making headlines with a potentially much higher valuation. Snapchat is reportedly in discussions that might put its value at $10 billion even though the company currently has very little, if any, revenue. Not much about the company's users is known. Snapchat has estimated that approximately 400 million "snaps" are sent daily, a user volume number that has strong appeal for revenue potential. But who exactly are these users, aside from generally being younger?

August 2014 Report: This Insight Report profiles the Snapchat user and highlights the brands they favor:

- **What more can we learn about the Snapchat fan?**
- **On which attributes do they differ the most from the general U.S. population?**
- **Which brands are more favored by them?**

For those watching the tech bubble – and for those who are just curious -- CivicScience used our InsightStore™ consumer research platform to answer that question. CivicScience's polling platform began tracking Snapchat usage in November 2013, asking consumers about their experience using the social sharing app. To date, the question has generated more than 18,000 responses, weighted for U.S. representativeness for gender and age, 13 years and older.

Top-line Results:

A total of 14% of U.S. consumers have used Snapchat, and half of those say they love using it. An additional 4% of the total respondents have not used it yet, but plan to:

CivicScience Insight Report (continued)

This Insight Report focuses on those respondents who are fans of Snapchat (those who answered "Yes, and I love it"), which is a total of 1,221 people. We compared the Snapchat fan to the general U.S. population in areas where we found sizable statistical differences. We analyzed respondents using the CivicScience DeepProfile™ report, which automatically cross-tabulates those respondents against thousands of other CivicScience syndicated questions they may have also potentially answered in the past.

In addition to demographics, we looked into these users' social media behaviors, shopping habits, technology usage, and entertainment preferences, among other categories. Also, we looked into the brands for which Snapchat fans have a greater affinity when compared to the general population, which could be very valuable if Snapchat decides to start selling display ads or pursuing some advertiser-related monetization strategy.

The overall younger age of the Snapchat fan will be reflected in the insights we highlight throughout this report, but our goal in this study is to provide more depth to better understand this segment. Not all young people "look" the same, after all.

Here's what we found:

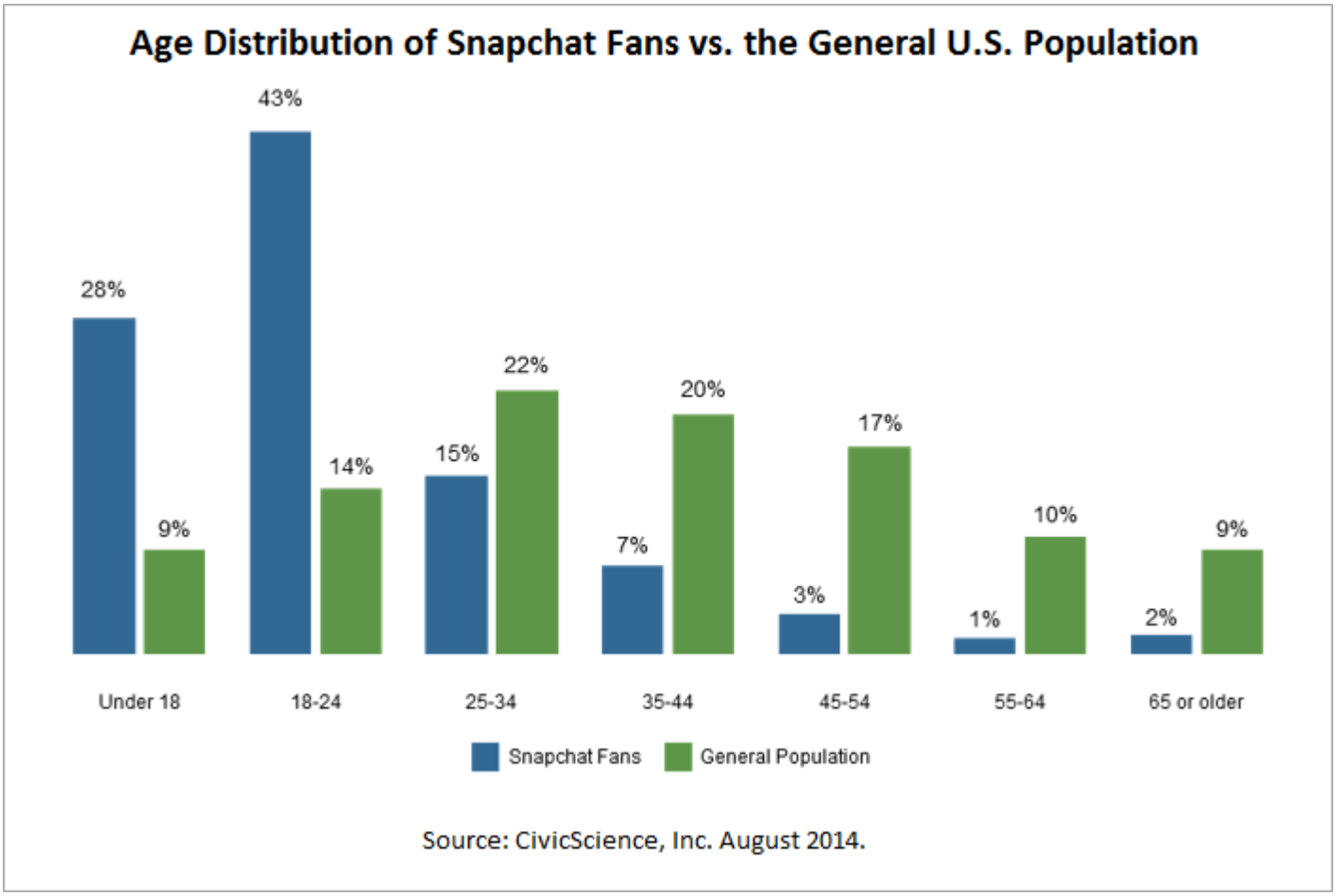
Demographic insights about Snapchat fans:

The little information that is public about Snapchat users are basic demographics. We wanted to point out some of the important demographic statistical differences that we found, one being the younger age skew of the users, when we compared the fans to the general U.S. population.

- Fans are 2X more likely to be 24 years old and under.
- 69% of Snapchat fans are women, compared to 31% of fans who are men. This differs greatly from the general population, which is 51% women and 49% men.
- Millennials (18 to 34 year olds) living in the Northeastern U.S. are 55% more likely to say they love using Snapchat than Millennials in the Western U.S. (*this is from a July 2014 Millennials study we did; please see our website for this report.)
- They are 25% more likely than the general population to have a household income of under $25K.
- Snapchat fans are 58% more likely to not be parents.
- Fans are 29% more likely to live in a city.
- They are over 2X as likely to still live with their parents.
- They are almost 2X more likely not to be registered to vote.

The last five bulleted insights are consistent with the age skew we see among this app's fan base.

CivicScience Insight Report (continued)



Social Media insights about the Snapchat fan:

One thing that stood out in this category is the higher degree of influence that these fans' friends and other contacts on social media have on their behaviors and purchasing habits.

- Snapchat fans are over 3X more likely to love using Instagram.
- Snapchat fans are over 2X more likely to get their fashion inspiration from social media sites.
- They are 95% more likely than the general population to say their friends and other contacts on social media influence the movies and television shows they watch.
- They are almost 2X more likely to say their friends and other contacts on social media influence the music they listen to.
- Snapchat fans are 86% more likely to say their friends and other contacts on social media influence the products they buy.
- The fans are 59% more likely to be most influenced by comments or recommendations on social media, rather than TV or online ads.

CivicScience Insight Report (continued)

- Snapchat fans are 2X as likely to share celebrity gossip or celebrity news via social media at least occasionally.
- They are 77% more likely to share entertainment news via social media at least occasionally.
- They are 89% more likely to often post comments on Facebook or Twitter while watching a TV show or movie.

Entertainment consumption insights about Snapchat fans:

Video games, music and movies are more important to Snapchat fans, especially comedy movies, than to the general U.S. population.

- Snapchat fans are 65% more likely to play video games at least weekly.
- They are 2X as likely to follow trends and current events in music.
- They are 2X as likely to go to the movies once a month or more.
- Snapchat fans are 31% more likely to favor comedy movies than the general population.

Technology use insights about Snapchat fans:

Given that Snapchat is a social sharing app, it's no surprise that its fans are more tech savvy than the general population. They are also slightly more likely to own portable tech devices.

- They are 56% more likely to use a smartphone.
- Snapchat fans are 43% more likely to say they are "addicted" to their digital devices.
- Fans are 18% more likely to own a tablet computer.
- They are 25% more likely to own an e-reader.

Shopping behavior insights about Snapchat fans:

More Snapchat fans tend to be market mavens than the general population, meaning they follow trends (music, fashion, etc.) and are more likely to be early adopters.

- Snapchat fans are 50% more likely to try new products before others.
- They are 33% more likely to always seek out online reviews for items they want to purchase.
- The fans are 87% more likely to say fashion trends impact what they wear.
- They are over 2X as likely to be into fashion as the general population.
- Fans are 28% more likely to say a company's social consciousness and overall kindness is important when choosing where to shop and what to buy.

CivicScience Insight Report (continued)

Health and lifestyle insights about Snapchat fans:

Snapchat fans wouldn't consider themselves to be very healthy, but they do eat out for lunch more often and are talkers.

- When asked why they don't eat healthier, they are 77% more likely to respond with "I am picky / don't like many healthy foods."
- They are 57% more likely to normally eat lunch out.
- Snapchat fans are 35% more likely to enjoy baking.
- They are 34% more likely to consider themselves more talkative in their work/social life.

Brands Favored by Snapchat Fans

Knowing which brands are more favored among Snapchat users could be very valuable information if and when Snapchat decides to get into the ad space business. Below is a table that shows the percentage of Snapchat fans that have told us that they "love" or "like" a brand (across hundreds of brands tracked by CivicScience), the percentage of the general population that said the same, and the percentage lift between the two segments.

Brand	Snapchat fans	General U.S. Population	% Over-Indexed
Urban Outfitters	34%	7%	+357%
Hollister & Co.	24%	7%	+247%
Beats by Dre	44%	14%	+220%
H&M	37%	12%	+199%
J. Crew	27%	9%	+198%
Express	29%	10%	+197%
American Eagle Outfitters	41%	16%	+156%
Aéropostale	25%	12%	+116%
Hot Topic	35%	16%	+114%
Nordstrom	36%	19%	+94%
Victoria's Secret	49%	26%	+90%
Netflix	78%	45%	+76%
GAP	27%	19%	+40%
Dannon Yogurts	43%	34%	+26%
Coke Zero	23%	18%	+23%
Old Navy	40%	32%	+23%

CivicScience Insight Report (continued)

Many of these brands are more younger-leaning, but the data is interesting to see which brands over-index the most among this app's fan base. Apparel and accessories certainly bubble to the top and are categories well-suited for an app based on image sharing.

We also found it interesting that the Snapchat fans overall had higher favorability for most of the luxury or higher-end automotive brands. Many of them may not be in the market to buy a luxury car, especially with the majority (59%) earning under $75K per year, but they might be a compelling group for purchases as they get older and draw a higher income:

Car Brand	Snapchat fan	General Population	% Over-Indexed
Porsche	52%	36%	+43%
Land Rover	32%	23%	+42%
Audi	43%	31%	+39%
BMW	52%	38%	+37%
Mercedes	46%	37%	+25%
Cadillac	41%	34%	+20%

In Summary

The report covers some of the insights we found while analyzing Snapchat fans. Although there has not yet been much public information available about Snapchat users, CivicScience is able to mine across many data points to get at who is using Snapchat and how they think and behave. There are hundreds of other attributes we can still look at – and can even segment specifically along specific age groups of Snapchat fans or by region.

Please contact us if there is interest in custom research of this (or another) consumer segment.

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents answer just for fun and are kept anonymous, allowing for greatly reduced bias and higher levels of engagement. Using technology, CivicScience builds deep psychographic profiles of these anonymous respondents over time, providing valuable consumer sentiment data to the decision makers who care. Automated data science technology allows clients to rapidly gain robust consumer insight and trending reports. The CivicScience methodology has been validated by a team of academic leaders and by independent consulting firms. Responses may be weighted for U.S. census representativeness for gender and age. CivicScience currently has more than 27 million anonymous consumer profiles and 600 million responses stored, growing daily.

Snapchat did not participate in this study in any way. © August 2014 CivicScience, Inc.