

Beyond Facebook:

# **Profiling Active Users of Next-Tier Social Media to Drive Smarter Marketing**

Q4 2015 Report Using the CivicScience InsightStore™



# Introduction

With nearly 80% of U.S. adults now using Facebook, its ability to reach large numbers of consumers across demographic, socio-economic, and geographic lines makes it a must-have advertising vehicle, akin to television or search. Nearly every brand or media outlet can reach a sizable enough portion of their target audience to justify a strong presence on the platform.

Behind Facebook, however, is the second wave of large and growing social media platforms who aspire to Facebook's stature, but today reach a more specialized group of users. Though smaller (consider that the next-largest social media site, Twitter, reaches less than 20% of the U.S. population), these platforms are attractive for certain types of advertisers – and less attractive for others -- based on the unique profiles of their audience.

It's widely known, for example, that Snapchat and Instagram reach younger users, while Pinterest's audience leans more female. But, the differences across these platforms go far beyond basic demographics and into the realm of psychographic characteristics that define the way people live, shop, watch, or even vote. As advertisers evaluate where to spend their precious dollars, a deeper understanding of these audience attributes is paramount.

The following report examines the key profile differences among **active** U.S.-based users of **Instagram**, **Pinterest**, **Snapchat**, **Tumblr**, and **Twitter** – comparing them to the general U.S. population across a wide-ranging set of consumer attributes available in CivicScience's research platform. What emerges is a clear picture of the unique variances among these five social networks and how each represents a promising vehicle for potential advertisers.

## About the Data

The data for this report were collected using the following question format:

### **How often do you use the social media site/app [name, i.e. Instagram]?**

- Only respondents who answered “**Daily**” or “**Weekly**” were included in the study, since we wanted to compare active vs. idle users.
- 423,302 U.S.-based respondents (U.S. Census weighting, ages 13+) among the five social media questions were analyzed.
- Collection dates: 7/10/2014 to 9/29/2015 for Twitter, Pinterest, Instagram, and Tumblr, and 1/9/2015 to 9/29/2015 for Snapchat.

Responses to these questions were cross-tabulated against hundreds of other possible questions in our platform that they've answered, and those respondents' attributes were then compared to the general population. What follows is an exclusive look into **active** social media users with hard-to-get, eye-opening insights.

If you are interested in more of this data or to understand our methodology, please let us know at [contact@civicscience.com](mailto:contact@civicscience.com).

## Gender of Active Users

	Male	Female
Twitter	49%	51%
Pinterest	21%	79%
Instagram	37%	63%
Tumblr	43%	57%
Snapchat	38%	63%

Pinterest has the largest active female population, followed by Instagram and Snapchat.

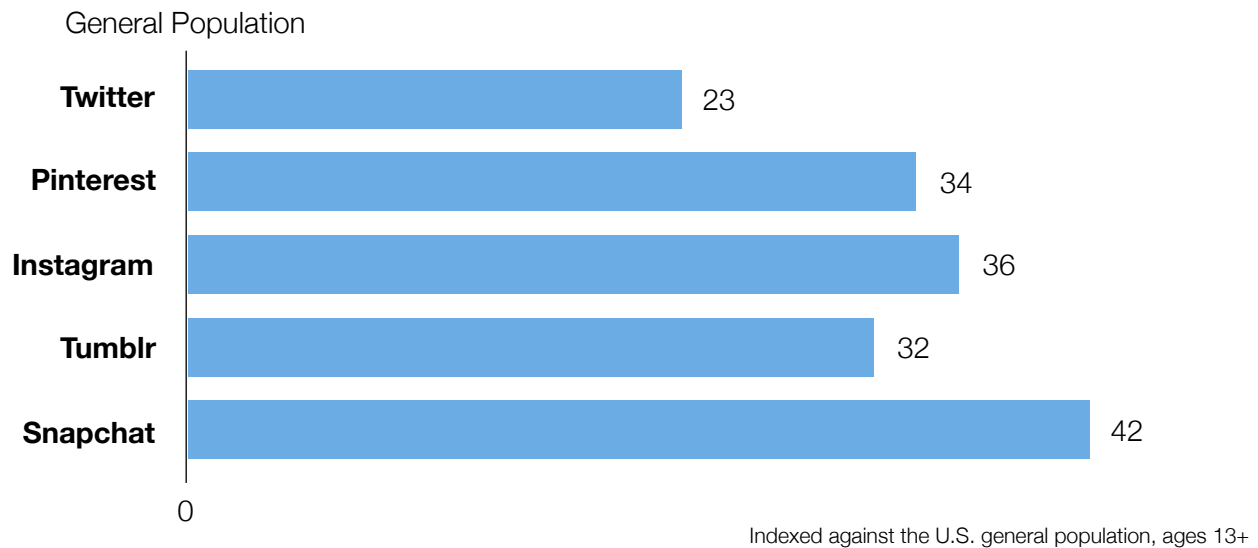
## Age of Active Users

	Under 25	25-34	35-54	55+
Twitter	36%	19%	32%	13%
Pinterest	26%	22%	34%	19%
Instagram	39%	22%	26%	13%
Tumblr	52%	15%	22%	11%
Snapchat	63%	21%	12%	4%

Active Tumblr and Snapchat users skew younger than the other social platform users:

- 63% of Snapchat fans are 24 and under.
- 52% of Tumblr fans are 24 and under.

## Who has more Market Mavens?

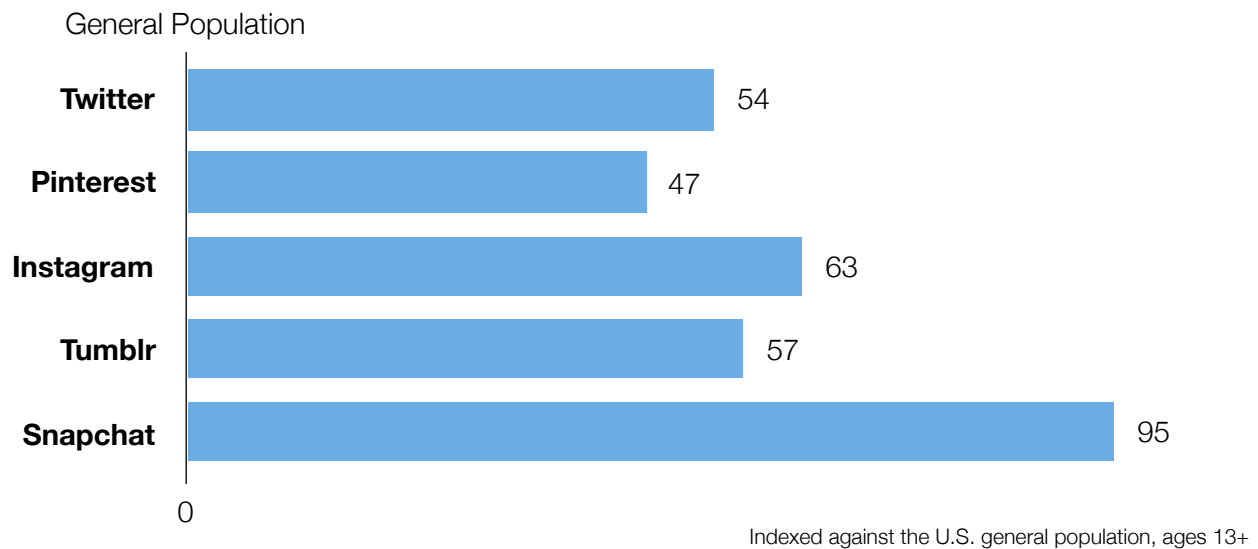


Our Market Maven index aims to identify the extent to which population segments adopt new products and brands, as well as share their opinions with others (evangelizers), as compared to the U.S. general population.

Overall, active Snapchat users are the most likely to exhibit Market Maven tendencies, indexing 42 points higher than the general population.

- Active Pinterest users are the most likely to tell others about their favorite products; they are 19% more likely to do so than the general population. Tumblr users are least likely to do this.
- Twitter users are most likely to tell others about new products.
- Active Snapchat and Tumblr users are the most likely to consider themselves fashion leaders.
- Active Snapchat users are the most likely to follow music trends. (Snapchat users are 58% more likely than the general population to follow music trends.)

## They actively use social media, but how much does it influence them?

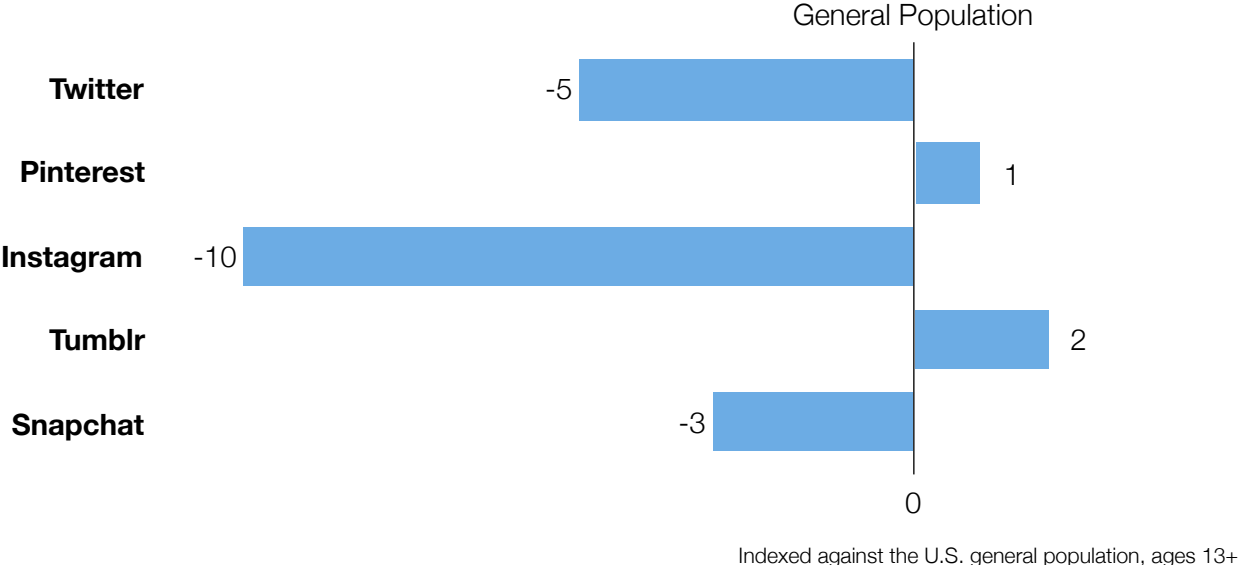


Our Social Media Influence index aims to identify the impact social media has on respondents' consumer preferences and behaviors.

All active users of these sites rank higher than the general U.S. population, but Snapchat users are by far the most likely to be influenced by social media platforms.

- Active Snapchat users are more likely to say their purchases, music tastes, TV/movie tastes, food purchases, and electronic purchases are influenced by social media.
- Active Snapchat and Instagram users spend more time on social media sites each day:
  - ➔ 79% of active Snapchat users use social media more than 1 hour each day.
  - ➔ 74% of active Instagram users use social media more than 1 hour each day.

# Price sensitivity differences:

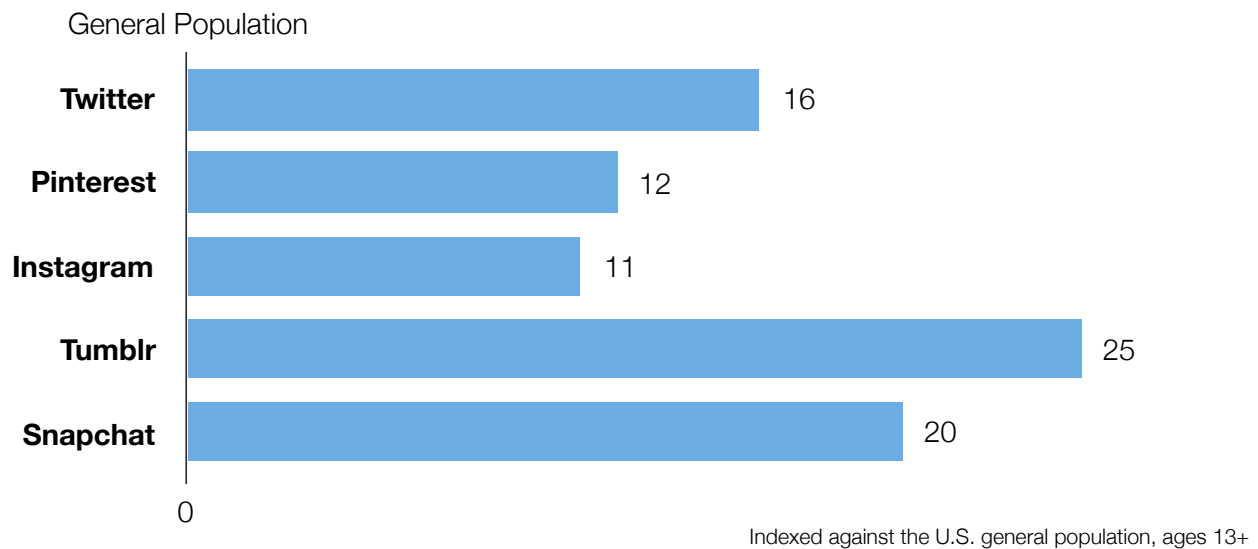


Our Price Sensitivity index aims to identify the extent to which population segments are price-conscious when shopping.

Tumblr users are the most price sensitive, followed by Pinterest users; however, their price sensitivity is similar to the general population. Instagram users are the least price sensitive.

- Active Tumblr users are the most price sensitive of these groups when it comes to purchasing electronics and clothes.
- Active Snapchat users are the most price sensitive when it comes to purchasing food.
- Active Pinterest users are the most likely to use coupons when shopping.
- Active Instagram users are the least likely to be price conscious when purchasing clothing.

## Younger-leaning sites have more discriminating shoppers

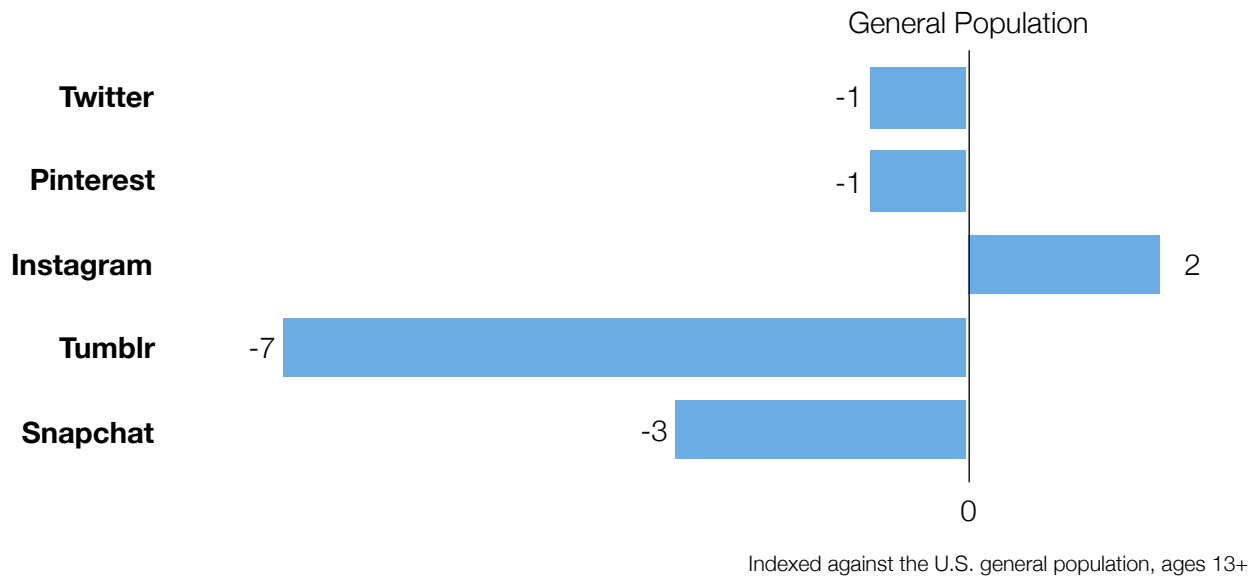


Our Discriminating Shopper index aims to identify the extent to which population segments do their research before making purchases, and how easy or difficult they will be to win over. This index looks at online research, price shopping, showrooming, and brand loyalty.

Although all of these active social media users index higher than the U.S. general population as discriminating shoppers, active Tumblr users rate the highest at 25 points, followed by Snapchat. If you recall, both have a heavy skew towards active users under the age of 25.

- Active Tumblr users compare prices the most. They are 17% more likely to compare prices than the general population.
- Active Tumblr users are more likely than the others to not be brand loyal, followed by active Snapchat users.
- Active Snapchat users are the least likely to compare prices before making purchases. They are 95% more likely than the general population to showroom while in stores.
- Active users of Pinterest rank highest for valuing price over brand when it comes to general purchasing.

# Active social media users' money management skills



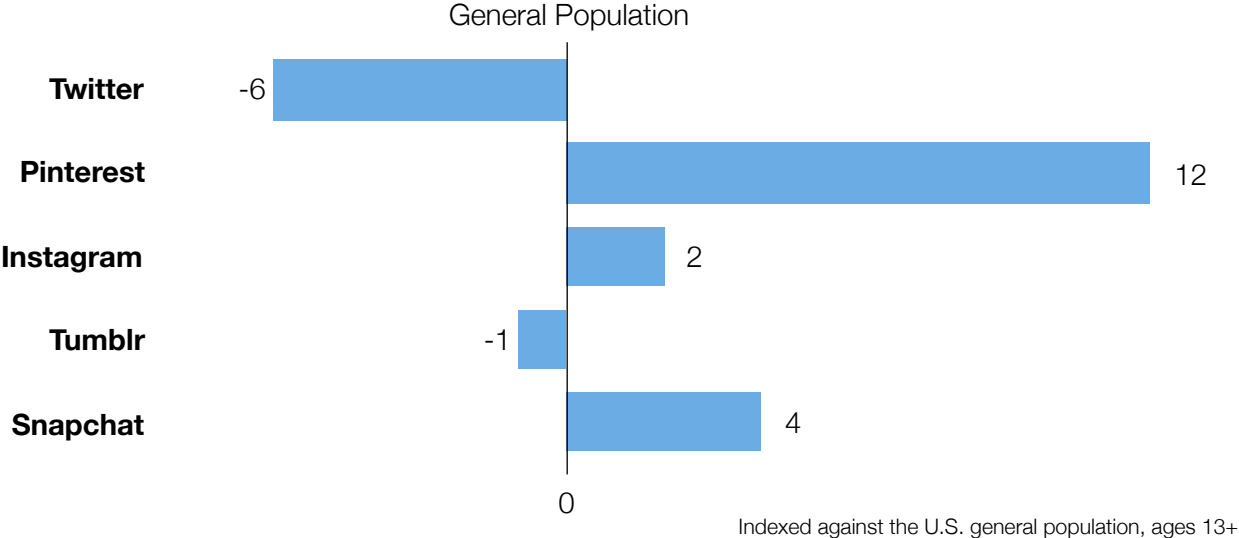
Our Money Manager index aims to identify the extent to which population segments manage their personal finances including retail, online, and mobile banking practices; retirement and savings; and keeping up with financial news.

Instagram users manage their money the best (slightly better than the general U.S. population).

- All active social network users are slightly less likely than the general population to say they manage their money “very well.”
- Active Tumblr users are the most likely to be diligent savers yet they are the least likely to frequently bank online — despite their youth.
- Active Snapchat users do their banking on a mobile device the most, followed by active Instagram users.



# Extent of TV viewership

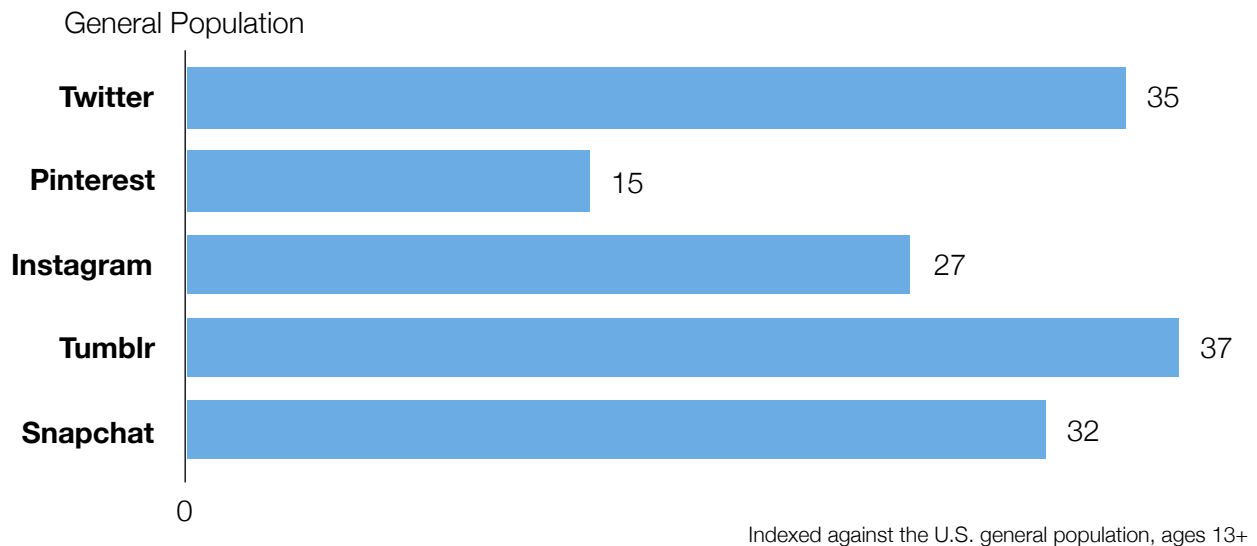


Our TV Viewing index aims to identify the extent that these segments watch different TV show genres and are influenced by what they see on TV. The higher the number on this index, the higher their overall TV consumption. Genre-specific attributes are available as we analyze these audiences more deeply.

Overall, Pinterest users watch the most TV, whereas Twitter users watch the least.

- Active Pinterest users are more likely than the others to watch dramas, reality, and travel/home/cooking shows.
- Active Pinterest users are the most likely to be influenced by ads on TV (rather than ads on the Internet or social media).
- Active Tumblr users are least likely to watch news shows.
- The most popular genre for all of them is music & entertainment.

## No surprise, this is a tech-savvy bunch:

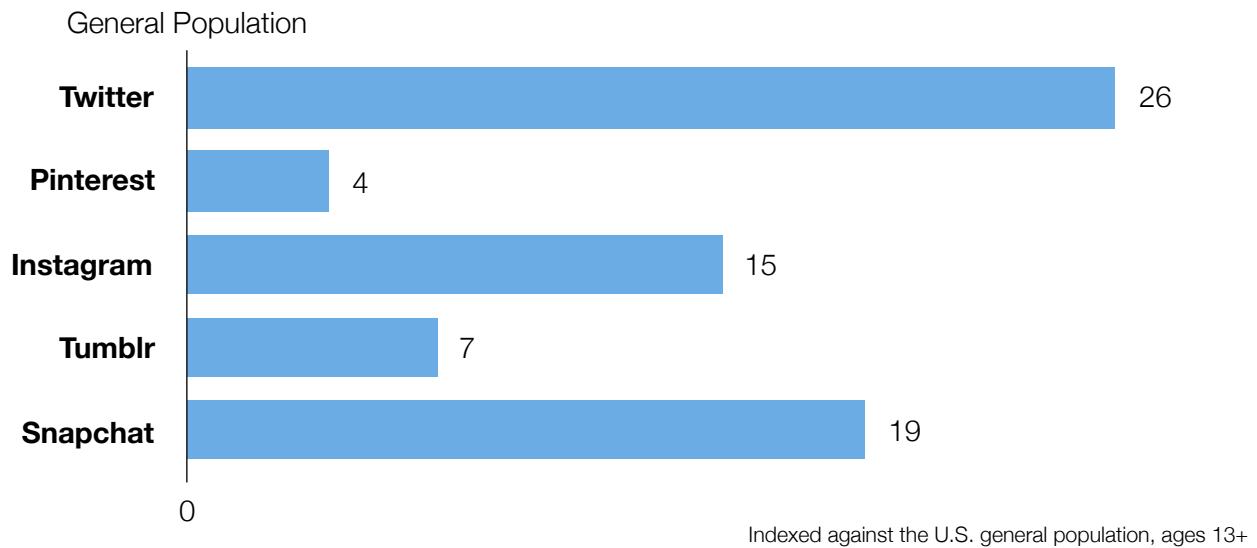


Our Tech Savvy index aims to identify the extent to which population segments use their digital devices and are informed and aware of the latest technology available.

Overall, active Tumblr users are the most tech savvy, followed by active Twitter users.

- Active Snapchat users are the most likely to own a smartphone (37% more likely than the U.S. general population), followed by Instagram users (31% more likely than the general population).
- Active Snapchat users are the most likely to be addicted to their digital devices.
- 62% of active Pinterest users own a tablet computer and 41% own an eReader, which is more than the other users and the general population. They are the least likely to play video games.
- Active Tumblr users are more likely to watch TV shows online and play video games than the others.

## Sports fandom differs across social platforms

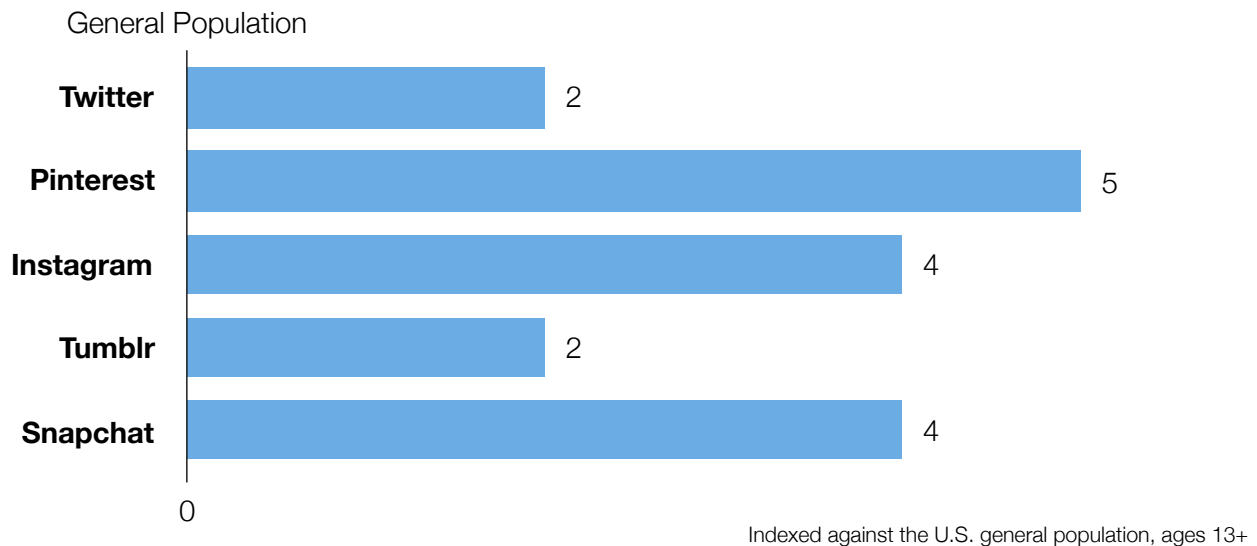


Our Sports Fan index aims to identify the extent to which population segments are interested in different types of sports.

In general, active Twitter users are the largest sports fans, and Pinterest active users the least (although still slightly higher than gen. pop.).

- Active Twitter users are the largest NFL, MLB, and NCAA football fans. They are also more likely to play fantasy sports than the others.
- Active Snapchat users are the most likely to be NHL fans. They are 81% more likely to follow the NHL than the general population.
- Active Snapchat and Instagram users are the most likely to regularly attend sporting events.
- Among Facebook's active users, the NFL is the sport most closely followed.
- Pinterest and Tumblr users are least likely to play fantasy sports.

## Who's taking better care of their health?

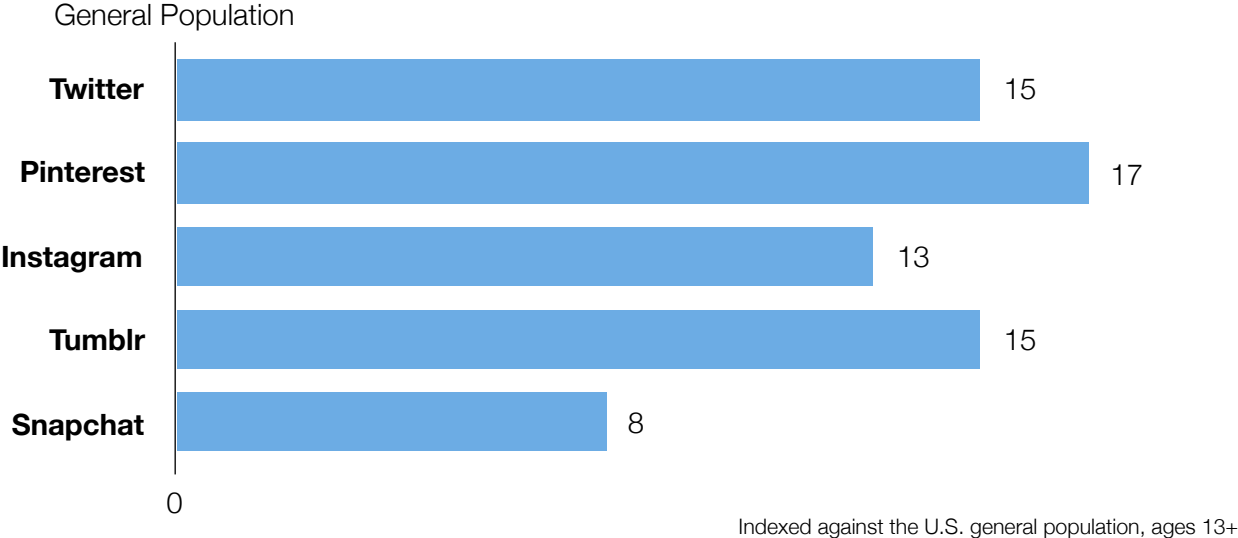


Our Health & Wellness index aims to identify the extent to which population segments monitor and maintain their health and wellbeing.

The overall health and wellness of these active social site users are very similar to each other and rank slightly above the general population.

- Active Snapchat users are slightly more likely to regularly exercise in general and are more likely to regularly exercise at a gym. They are the least likely to eat healthy, likely due to their younger age skew.
- Active Pinterest users are the most likely to read nutritional information of the food they buy (17% more likely than the general population) and are slightly more likely than the others to take vitamins and nutritional supplements on a regular basis.
- Twitter's active users have the highest non-smoking score.

# Environmental consciousness



Our Environmental Consciousness index aims to identify the extent to which population segments alter their lifestyle for the environment and shows overall concern about environmental issues.

Overall, active Pinterest users have the highest environmental consciousness.

- Active Tumblr users are the most likely to be very concerned about climate change and to recycle.
- Active Pinterest users are most likely to buy locally grown food compared the others and to use reusable shopping bags.
- Twitter’s active users are the most likely to buy environmentally friendly products.

# Summary

We found some general highlights looking across the data at these active social site and app users. The more “visual” social sites and apps skew towards women. Overall, all active users of these social sites are more tech-savvy than the U.S. general population. On the other hand, they also rate lower than the general population when it comes to managing their personal finances (aside from Instagram users). But the real gold is finding the site-specific overall differences shown in this report. Here are some helpful recaps by social media network:

## **Pinterest:**

### ***Females; Evangelizers; Couponers; TV Fans; Healthy & Environmental***

Pinterest has the largest gender skew, with nearly 8 of 10 active users being women. They are the most likely to evangelize their favorite products and are the most likely to use coupons. Pinterest's active users are significant TV content consumers especially when it comes to drama and travel/home/cooking shows, outpacing the runner-up (Snapchat users) by a factor of three. These social media users exhibit the most healthy practices of all the segments studied, and they favor reading nutritional labels, buying locally grown food, and taking supplements more than others. They also rank the highest for environmental consciousness.

## **Snapchat:**

### ***Youngsters; Social Media Fangirls; Device Addicts; Mavens; Tech and Music Savvy***

Snapchat has the greatest age skew, with over 60% of their active users under 25, and 63% of all users are female. They are the most likely to say they are “addicted” to their digital devices. Snapchat active users overall are the biggest Market Mavens and most heavily influenced by social media, on which 79% spend more than an hour a day. They are also pretty tech savvy and heavily follow music trends. Active Snapchat users may get more exercise than the other groups overall, but they are also the most likely to eat unhealthy.

## **Tumblr:**

### ***Youngsters; Price Sensitive; Tech Savvy; Poor Money Management; Less Brand Loyal***

Tumblr is a much younger-leading site too, with 52% of its active users being under age 25. Tumblr's active users are the most price sensitive, especially for electronics and clothing, and they compare prices the most. They also rank highest in aggregate tech-savviness but are least likely to bank online. While they may be diligent savers, they rank the lowest on money management attributes. They are far less brand loyal than the other groups. They are more likely to watch TV content online and play video games.

## **Twitter:**

### ***Gender-Balanced; Major Sports Fans***

Twitter's active user base most closely resembles the general population's gender split (49% men, 51% women) of all the groups studied. Twitter's active users overall are major sports fans, ranking highest among all user groups on the sports index, and they love fantasy sports. On individual leagues, they are much more likely to closely follow the NFL, MLB, and NCAA football. They're also less likely to smoke and more likely to buy eco-friendly products.

## **Instagram:**

### ***Women; Social Media Fans; Good Money Managers***

Instagram is owned by Facebook and, according to Statista, had over 64 million active users in the U.S. as of 2014. Women make up 63% of Instagram's active users. Nearly three-quarters of its active users spend over an hour on social media daily. Instagram users rank best for money management yet are least price-sensitive (although they tend to pay attention to price tags on clothing). They also like to regularly attend sporting events.



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