FROM SOCIAL TO SALE

8 QUESTIONS TO ASK YOUR CUSTOMERS
HOW DOES SOCIAL MEDIA TRANSFORM SALES?

A decade into the social revolution, it’s still the number one question for brands, executives and marketers. Yes, we know social is making an impact on consumer purchasing... but how big an impact? And how do customers make the journey from tweeting, pinning or liking an item, to actually purchasing it?

**THIS REPORT PROVIDES ANSWERS** to those questions based on nearly 6,000 survey responses on social purchasing behavior. This data gives us the big picture of how three of the biggest social networks in the shopping world today – Facebook, Pinterest and Twitter – drive customers to make purchases on- and offline.

But the data also shows us how many questions we still need to ask. The variations across social networks, consumer demographics and product categories speak volumes about the necessity of every company understanding the specific relationship between social and purchasing for its own customers.

In this report, we not only share the answers we have found about social media and purchasing. We share the questions you still need to ask.

**KEY FINDINGS**

**4 IN 10 SOCIAL MEDIA USERS** have purchased an item online or in-store after sharing or favoriting it on Twitter, Facebook or Pinterest.

**SOCIAL MEDIA DRIVES ROUGHLY EQUAL AMOUNTS** of online and in-store purchasing.

**HALF OF SOCIAL MEDIA-RELATED PURCHASING** takes place within 1 week of sharing or favoriting the ultimately-purchased item.

**68% OF FACEBOOK USERS** are “lurkers” who post only rarely, so the influence of social on their purchasing will not be visible from social media analytics alone.

**PINTEREST IS THE NETWORK MOST LIKELY TO DRIVE SPONTANEOUS PURCHASING**

Twitter and Facebook purchasers are more likely to make social media-related purchases of products they were already researching or considering.

Meet Patty, a Pinterest purchaser

Meet Fabiana, a Facebook purchaser
How often, if ever, do you visit these social networks? / Asked April 2013
Have you ever purchased an item – either in-store or online – after you shared or favorited it? / Asked April 2013

How Pinterest Puts People in Stores
Social media not only drives people to make online purchases; it also drives an equal volume of in-store sales. In the July/August 2013 issue of the Harvard Business Review, we put Pinterest under the microscope to show how it puts people in stores. Data from the US, Canada and the UK demonstrates that for all the worry about how “showrooming” benefits online retailers at the expense of bricks-and-mortar, there is an even bigger phenomenon of “reverse showrooming”: customers who browse online, and buy offline. The Harvard study paints a picture of Pinterest’s impact on in-store shopping that at times stands in sharp contrast to the overall impact of social media on online and in-store shopping combined. To read this article in the Harvard Business Review, please visit http://bit.ly/hbrpinterest.

About the Data
The data in this report is drawn from online surveys conducted over 17 months (February 2012 to June 2013). In total, 5,657 interviews specifically about social media purchasing were completed across three countries using Vision Critical’s Market Panels in the USA (Springboard US), Canada (Angus Reid Forum), and the UK (Springboard UK).

Note: Throughout this document, SHARED and FAVORITED is shorthand for:
• pinned/repinned/liked it on Pinterest
• shared/liked/commented on it on Facebook
• tweeted/retweeted or favorited it on Twitter

• June 2013, Social Path to Purchase Study: 1,006 respondents in the USA
• April 2013, Social to Store Study: 2,864 respondents in the USA, Canada, and UK
• April 2013, Social Media Usage Study: 86,155 respondents in USA, Canada, and UK
• March 2013, Pinterest Follow Up Study: 501 respondents in the USA
• February 2013, Pinterest Study: 779 respondents in the USA
• March 2012, Pinterest Study: 507 respondents in the USA
• February 2012, Social Media Usage Study: 62,121 respondents in the USA and Canada
WHICH SOCIAL NETWORKS DO YOUR CUSTOMERS USE, AND HOW MUCH?

If you want to use social media to reach your customers, you need to know where to find them online. Social media isn’t one thing: it’s a sprawling empire made up of many different neighborhoods, each of which attracts its own subset of your customers.

THE SOCIAL MEDIA AUDIENCE: AGE AND GENDER

<table>
<thead>
<tr>
<th>Platform</th>
<th>18-34 Users</th>
<th>35-54 Users</th>
<th>55+ Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinterest</td>
<td>32% FEMALE</td>
<td>45% FEMALE</td>
<td>23% FEMALE</td>
</tr>
<tr>
<td>Facebook</td>
<td>20% FEMALE</td>
<td>45% FEMALE</td>
<td>35% FEMALE</td>
</tr>
<tr>
<td>Twitter</td>
<td>33% FEMALE</td>
<td>43% FEMALE</td>
<td>24% FEMALE</td>
</tr>
</tbody>
</table>

As this report shows, social media usage varies so dramatically across different product categories and different demographics that you will really need to study your own customers’ usage patterns in order to set your social strategy. But there are certain overarching patterns that give us a foundational picture of who can be found where, and more crucially, which dimensions of usage you will need to understand for your own customer base.

IT’S CRUCIAL THAT YOU KNOW which customer segments hang out in which neighborhood – that is, on which social network, or even in which groups or conversations within each network. To make effective use of social media as a marketing channel, you have to know where your customers are and which customer segments are on each network. This is table stakes.
On average, how often do you visit or log into one of these sites or services, either in your web browser or by using an app?

Asked April 2013

75% of social media users 18-34 log into Facebook several times a day

61% of UK social media users never visit Pinterest
### Variations by Age

<table>
<thead>
<tr>
<th>Variation</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 in 20 Twitter users</td>
<td></td>
<td>Age 18-34 access Twitter at least once a day</td>
</tr>
<tr>
<td>5 in 20 Pinterest users</td>
<td></td>
<td>Age 55+ accesses Twitter at least once a day</td>
</tr>
</tbody>
</table>

### Variations by Gender

<table>
<thead>
<tr>
<th>Variation</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 in 20 men</td>
<td></td>
<td>Uses Pinterest</td>
</tr>
<tr>
<td>5 in 20 women</td>
<td></td>
<td>Use Pinterest</td>
</tr>
</tbody>
</table>

### Variations by Usage

<table>
<thead>
<tr>
<th>Variation</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 in 20 Twitter users</td>
<td></td>
<td>Are “lurkers” who tweet less than 5 times a week</td>
</tr>
<tr>
<td>10 in 20 Twitter lurkers</td>
<td></td>
<td>Log in 3 times a week or more</td>
</tr>
</tbody>
</table>

On average, how often do you visit or use these sites? Asked April 2013

On average, how many times a week do you use these sites? Asked February 2013

On average, how much do you tweet? / Asked March 2012

How often do you access Twitter (either directly or through a third party application)? / Asked March 2012

Visits both Facebook and Pinterest several times a day
In addition to the social media users who share prospective purchases as part of their active social media presence, most brands have a large invisible audience. On Facebook, a majority of lurkers access or log into the site every day, but post only rarely: 64% of Facebook lurkers post less than once a week. That means social media analytics can’t tell you a lot about their interests, preferences or even their demographics, let alone the influence of social on their in-store purchasing. To understand how social media drives both online and in-store purchasing for both “ sharers” and “ lurkers”, you need to ask your customers about the role of social media in their purchase story.

**MEET THE LURKERS**

**MEET THE 65% OF FACEBOOK USERS WHO POST LESS THAN 5 TIMES PER WEEK**

<table>
<thead>
<tr>
<th>LOG-IN FREQUENCY</th>
<th>POSTING FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>55% LOG IN AT LEAST ONCE A DAY</td>
<td>POST 1-4 TIMES A WEEK</td>
</tr>
<tr>
<td>32% LOG IN AT LEAST ONCE A WEEK</td>
<td>POST LESS THAN ONCE A WEEK, BUT MORE THAN 10 TIMES IN THE PAST YEAR</td>
</tr>
<tr>
<td>10% LOG IN AT LEAST ONCE A MONTH</td>
<td>HAVE POSTED TO FACEBOOK, BUT LESS THAN 10 TIMES IN THE PAST YEAR</td>
</tr>
</tbody>
</table>

How often do you access your Facebook account? On average, how often do you post, like or share an update, video, photo or comment on Facebook? / Asked February 2012

**ASK YOUR CUSTOMERS**...

- Which social websites do they visit or belong to?
- Which networks do they log onto regularly? How often?
- Which networks and sites do they post to, and how often?
- What is their age, gender, household income and education level? Match this basic demographic data with other data you have on your customer base.

**ACTION ITEM**

Ensure your social strategy has some content or offers that appeal to lurkers, and some that appeal to sharers.

**USE CUSTOMER INSIGHTS TO**...

- IDENTIFY WHICH NETWORKS WILL BE MOST EFFECTIVE in reaching any given demographic, whether it’s millennials or seniors.
- BALANCE YOUR SOCIAL MEDIA UPDATES so that you have some content or offers that appeal to lurkers, and some that appeal to sharers.
- WEIGH THE IMPLICATIONS OF YOUR SOCIAL MEDIA ANALYTICS against the preferences of your broader social media audience, including those who hardly post and therefore may not turn up in your analytics report.
- DEVELOP AN INFLUENCER STRATEGY that lets you specifically target and engage highly active social media users.
WHAT DO YOUR CUSTOMERS WANT FROM EACH OF YOUR SOCIAL NETWORK PRESENCES?

Different topics resonate on different networks — but don’t assume you fall neatly in your sector. You need to ask your customers what they like to do on each network, and especially how and where they want to engage with you.

TOP CATEGORIES OF ACTIVITY BY NETWORK

SOCIAL MEDIA USERS ENGAGE with different topics on different social networks. People turn to Pinterest for DIY, crafts, food and drink, and fashion and beauty; they look to Facebook for humor and human interest stories. Arts and entertainment are a consistent draw across all of Pinterest, Facebook and Twitter.

USE THE 3 C’S: MATCH YOUR PRESENCE TO EACH PLATFORM

If you understand the content, culture and product categories that make up your customers’ experience on each social platform, you can target your marketing and sales strategy to maximize your customers’ engagement wherever they find you.

CONTENT: To attract and engage your customers on a specific social network, you need to present content that speaks to the hottest topics on that network, in the media that thrive there.

CULTURE: The topics or areas of activity that thrive on each network are inextricable from its culture: the kind of people who get excited about DIY projects constitute a different culture and community from those who are thrilled by LOLcats. Understanding the tone and social norms of each network is essential to engaging your customers’ interest, rather than turning them off.

CATEGORY: If you sell across multiple product or service categories, you have the potential to calibrate your presence on each social network to the interests that your customers pursue there.

FOLLOWS FASHION AND PRODUCT RELEASES ON BOTH FACEBOOK AND PINTEREST
USE CUSTOMER INSIGHTS TO...

- **FOCUS YOUR PRESENCE** on each network around the segment of your customers or the categories of your products that are most at home there.
- **IDENTIFY WHICH PRODUCTS OR OFFERS TO PROMOTE** on each platform.
- **ASSIGN STAFF MEMBERS** who are most likely to be brilliant at managing each of your presences — for example, assigning the office foodie to manage your Pinterest presence, and tasking the Buzzfeed addict with the job of maintaining your Facebook page.
- **DEVELOP PLATFORM-SPECIFIC BRANDING GUIDELINES** so that your brand voice can be subtly calibrated to the culture of each network and the expectations of the customers who use it.
- **BUILD A CONTENT CALENDAR** that ensures you regularly develop assets of the type and theme that will appeal to the customer audience on each network where you have a presence.

ASK YOUR CUSTOMERS...

- What kinds of photos, music, video or stories do your customers find engaging on each platform? Are they looking for informational content in one platform, and aesthetic inspiration in another?
- How do your customers see the character of each network they use, and what do they like (or dislike) about the experience they have there?
- Which product and service categories do your customers like to shop from, browse or hear about on each network they use?

**ACTION ITEM**

Create network-specific branding guidelines that address the content, culture and product categories your presence will support.

---

**FOLLOWS CRAFTS ON BOTH FACEBOOK AND PINTEREST, BUT HUMOR ON FACEBOOK ONLY**
HOW MANY OF YOUR CUSTOMERS HAVE BOUGHT ONE OF YOUR PRODUCTS AFTER SHARING OR FAVORITING IT?

Getting the basics on your customers’ social purchasing behavior is what allows you to analyze all the other variables in driving that purchase. Once you know which of your customers have gone from social to purchase, where they made that purchase, and which network triggered it, you can start to understand how they went from social to sale.

SOCIAL PURCHASING BY NETWORK

On each platform, some purchasers have made both online and offline purchases.

PINTEREST

21% IN-STORE

22% ONLINE

TOTAL 29%

FACEBOOK

30% IN-STORE

29% ONLINE

TOTAL 38%

TWITTER

17% IN-STORE

18% ONLINE

TOTAL 22%

Have you ever purchased an item – either in-store or online – after you shared or favorited it? / Asked April 2013

HARD DATA ON SOCIAL MEDIA-INSPIRED PURCHASING is the foundation of your entire social media marketing strategy. Only a portion of the social media audience – 43% of users – has gone from social to sale, so you need to think about both how to reach that slice of your social audience, and how to turn more of your social audience into buyers. Which networks actually drive people to buy your products or services? And are they buying those products online or in-store?

FACEBOOK IS THE NETWORK MOST LIKELY TO DRIVE CUSTOMERS TOWARDS A PURCHASE

Nearly 1 in 3 Facebook users has purchased something after sharing, liking or commenting on it on Facebook.
**Twitter Purchasers by Income**

<table>
<thead>
<tr>
<th>Income</th>
<th>In-store</th>
<th>Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $25K</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>$25K - &lt; $50K</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>$50K+</td>
<td>48%</td>
<td>39%</td>
</tr>
<tr>
<td>No answer</td>
<td>7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Top Retail Locations for Social-to-Store Purchases**

<table>
<thead>
<tr>
<th>Retail Type</th>
<th>Supermarket</th>
<th>Department Store</th>
<th>Discount Retailer</th>
<th>Specialty Retailer</th>
<th>Pinterest Purchasers</th>
<th>Facebook Purchasers</th>
<th>Twitter Purchasers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>43%</td>
<td>9%</td>
<td>10%</td>
<td>9%</td>
<td>31%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Department Store</td>
<td>18%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>31%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Discount Retailer</td>
<td>15%</td>
<td>15%</td>
<td>21%</td>
<td>9%</td>
<td>43%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Specialty Retailer</td>
<td>14%</td>
<td>10%</td>
<td>26%</td>
<td>21%</td>
<td>12%</td>
<td>1%</td>
<td>12%</td>
</tr>
<tr>
<td>No answer</td>
<td>7%</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Ask Your Customers...**

- Have they ever purchased something they have seen or shared on a social network? (Ask this question of each network you participate in or advertise on.)
- Have they ever purchased one of your products or services after seeing it on a social network? Which one?
- Have they ever shared or posted about one of your products? Did they go on to purchase that product?

**Action Item**

*Develop a strategy for using social to drive in-store purchasing.*

**Use Customer Insights To...**

- **Validate or Qualify the Picture You’re Getting from Social Analytics and Transactional Data**, particularly when it comes to drawing the dotted line between online social interaction and offline in-store sales.
- **Balance or Develop Separate Strategies** for using social to drive online vs. in-store purchasing.
- **Identify Tracking Mechanisms** like coupon codes that can help you quantify the role of social in driving in-store sales.
- **Allocate Your Social Media Budget** towards those networks that drive the greatest volume of sales, or when warranted, that are under-performing (if you think greater investment can improve the results).
**WHAT ARE THE SPECIFIC PURCHASES THAT ARE TRIGGERED BY SOCIAL MEDIA?**

If you’re interested in how social moves product, you’re fascinated by how social moves your product. To understand the impact of social on your business, you need to understand the social path to sale in your key product categories.

---

**MAJOR CATEGORIES OF SOCIAL-TO-SALE PURCHASING**

<table>
<thead>
<tr>
<th>Pinterest</th>
<th>Facebook</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOOD &amp; DRINK</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>ART &amp; DESIGN, DIY, CRAFT, PHOTOGRAPHY</td>
<td>21%</td>
<td>5%</td>
</tr>
<tr>
<td>GARDENING &amp; DéCOR</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>HAIR &amp; BEAUTY, MEN’S &amp; WOMEN’S APPAREL</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>TECH &amp; ELECTRONICS</td>
<td>6%</td>
<td>25%</td>
</tr>
<tr>
<td>OTHER</td>
<td>14%</td>
<td>26%</td>
</tr>
</tbody>
</table>

To the best of your recollection, in which product category was the last item you purchased after you shared or favorited it?

*As of April and June 2013*

---

**TECHNOLOGY IS KING**

34% of Twitter purchasers and 25% of Facebook purchasers say their most recent social-inspired purchase was in technology or electronics.

**THE BEST WAY TO UNDERSTAND** how social media drives revenue for your business is to combine social media and transactional data with customer surveys that illuminate the social path to purchase for your products. The wide variation in purchasing behavior and shopper demographics across categories shows the necessity of understanding the role of social in driving the purchase of specific products.
ASK YOUR CUSTOMERS...

• What was the last product they purchased after seeing or sharing it on social? What was the last product of yours that they purchased? Which network did they find or share it on? What category was this product in?
• How much does social media influence the “lurkers” in your social media audience?
• How many of your customers have purchased products they have seen on social media, even if they didn’t share or favorite those items?
• Thinking about the social media-influenced purchases they have made recently, which were the top three categories they purchased in?
• Which of your competitors’ products have your customers purchased after seeing or sharing them on a social network? Which network? How often? (Provide a list of your competitors, and get the answer for each one.)

USE CUSTOMER INSIGHTS TO...

• SHOWCASE PRODUCTS that are most likely to generate customer interest on a particular platform.
• CURATE PAGES, PINBOARDS OR FEEDS that correspond to different areas of consumer interest.
• ALLOCATE RESOURCES to the platforms that are most effective for your product categories.

ACTION ITEM

Combine social media and transactional data with customer surveys that illuminate the social path to purchase for your products.
FROM SOCIAL TO SALE: PURCHASES INSPIRED BY
PINTEREST FACEBOOK & TWITTER

BAG OF MOSS
COMPUTER SPEAKERS
GLOW
STICKS FOR A PROJECT
CRAFT SUPPLIES TO MAKE A GNOME
GARDEN HOUSE
CAMPBELL’S COOKING SAUCE
COOKING BOOK
SAUCE
Kraft cracker
HEINEKEN BEER

AN OVER-THE-DOOR ORGANIZER TO USE AS A VERTICAL PLANTER
GARDEN TOOLS
INGREDIENTS FOR REESE’S PEANUT BUTTER TRIFLE
Chicken Pot Pie
CANON 24-70 MM 2.8 LENS
A SCIENCE FICTION NOVEL
Gorgeous pair of shoes from Town Shoes
MASON JARS
DOUBLE LAVENDER ANGEL
TRUMPET PLANT
A COOKIE SHEET
a CD
Samsung Galaxy tablet
RALPH LAUREN TOTE BAG
SONS OF ANARCHY T-SHIRT
GAME OF THRONES BOARD GAME
A HOODIE
A SHIRT FROM FOREVER

SNACKS
SOLAR STRING LIGHTS
GARDEN HOUSE
FOOD
RUNNING SHOES
MOTORCYCLE HELMET
BARREL AGED CHEESE
A SHIRT FROM FOREVER 21
| THE LOVE YOU A LATTE CARTRIDGE FROM CRICUT | SHOES |
| FLOWERS  | VIDEO GAME |
| FOOD  | A Chair |
| Ingredients for Homemade Danish Pastries | Coffee Maker |
| OPI NAIL ENVY | Radio |
| Dog Sweater | Shoes |
| Buttons Off An Etsy Designer | Hanes Pocket Tees |
| Larry the Cable Guy Dinners | CRUISE |
| FOOD | A Hat |
| TREADMILL | A FLOOR TO CEILING LAMP |
| CLOTHING | 12” GRILL PAN |
| Recycled Post It Notes | Nap Mat |
| LINDT CHOCOLATES | BLOUSE |
| Jewelry | EMATIC KIDS FUNTAB |
| Earrings | Make Up Organizer |
| AN ORGANIC GARDENING BOOK | COMFORTER SET |

To the best of your recollection, what specifically was the last item you purchased after you shared or favorited it?

Askerd March, May and June 2013
DOES PURCHASING LEAD TO SHARING, OR DOES SHARING LEAD TO PURCHASING?

When it comes to the role of social in driving sales, it can be hard to separate cause and effect. Do people find and share products they’ve already more-or-less committed to buying? Or do people stumble across products they’d never seek out, or had only vaguely contemplated, and share them as a step towards making a purchase decision?

PURCHASE INTENT

When you shared or favorite this item, were you already thinking of purchasing it? / Asked April and June 2013

THE CAUSAL RELATIONSHIP between sharing and purchasing depends on the individual customer and the individual purchase. In some instances, social sharing is only a weak indication of intent; in other cases, social sharing leads directly to the cash register.

To understand this variation, we asked social purchasers whether they were already thinking of buying the ultimately-purchased item at the time they shared or favorited it. It was through this question that we discovered three distinct tribes of social shoppers, each of whom uses social at a different stage in the purchase process. (See A closer look: The three tribes of social shopping, pp 18-19).

Purchase intent is intimately linked to purchase discovery. Not surprisingly, spontaneous purchasing correlates with spontaneous discovery: 41% of people who found the item they purchased because they just happened upon it said that they hadn’t even thought about buying it or something like it. Conversely, 88% of people who found the item they purchased by searching for it were already thinking about buying it or something like it. It’s hard to get surprised by a find when you’re actively looking for it.
**How Social Purchases Are First Discovered**

![Diagram showing how social purchases are first discovered]

- **47%** I was searching for it online
- **28%** Somebody showed it to me while we were talking
- **9%** I got an email linking to it
- **9%** I just happened upon it
- **8%** Can’t recall

**To best of your recollection, how did you first come across this item online? / Asked April 2013**

**Did you create a pinboard for this specific product category or purchase decision? / Asked April 2013**

**Ask Your Customers...**

- When a customer shares an item of yours en route to making a purchase, is that part of an active research process? Or is it a spontaneous discovery?
- Which products and product categories are most likely to inspire spontaneous, new purchases? On which networks?
- Do people purchase your product when they’ve been thinking about the general category you’re in, or only when they’ve been thinking specifically about your product?
- Where do people mostly discover the items they share or interact with on social?

**Use Customer Insights To...**

- **Target Likely Purchasers** by learning to recognize questers by their networks, product categories and behaviors.
- **Inspire New Customers to Make Spontaneous Purchases** by reverse engineering the path to purchase of your “leaper” customers, so you know the social network and category that are most likely to attract them.
- **Distinguish Between Decided and Undecided Customers** by identifying the social sharing pattern that characterizes people who are evaluating multiple products, as opposed to those who are on the edge of commitment.
- **Target People Who Show a Degree of Focused Interest**, particularly if you’re in a category with a high unit value (like cars). For example, target people who have pinned a whole bunch of Volvo models to a single Pinterest board.

**Action Item**

*Focus social outreach on customers whose sharing indicates they are actively researching high-value or recurring purchases in your category.*

**Saw the Recipe on a Friend’s Pinterest Board**

**Vision Critical | From Social to Sale**

17
A CLOSER LOOK: 
THE THREE TRIBES OF SOCIAL SHOPPING

Social purchasers aren’t like other people, or even like other social media users. As the trailblazers of this new world of social shopping, they are distinctive in every way: in their demographics, in their values and even in the way they shop. They are also distinct from one another: social purchasers fall into three discrete tribes. To understand these tribes, however, it helps to understand what makes social purchasers different from other social media users.

WHO ARE THE SOCIAL PURCHASERS?

<table>
<thead>
<tr>
<th>GENERAL POPULATION</th>
<th>SOCIAL PURCHASERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>49%</strong> 31%</td>
<td><strong>56%</strong> 51%</td>
</tr>
<tr>
<td><strong>51%</strong> 37%</td>
<td><strong>44%</strong> 34%</td>
</tr>
<tr>
<td><strong>32%</strong> 15%</td>
<td><strong>15%</strong> 15%</td>
</tr>
</tbody>
</table>

Have you ever purchased an item – either in-store or online – after you shared or favorited it? / Asked June 2013

SOCIAL PURCHASERS ARE...

**MORE ACTIVE FACEBOOK USERS:**

87% of Facebook purchasers visit the site at least once a day

or more often vs. 70% of social media users

**MORE VISIBLE FACEBOOK USERS:**

68% say their Facebook posts generate lots of likes and comments

vs. 54% of social media users

**MORE INFLUENTIAL ON THEIR FRIENDS’ BUYING DECISIONS:**

75% of Facebook purchasers say they’re asked for advice on their friends’ buying decisions

vs. 51% of social media users

**MORE USE OF MOBILE DEVICES WHILE SHOPPING:**

27% comparison shop on their mobile devices while in stores

vs. 15% of social media users

**MORE VALUE CONSCIOUS WHILE SHOPPING:**

50% will try out products in-store but will purchase in competitive stores if it’s cheaper

vs. 35% of social media users
You can find each of these tribes on all three of the major social networks. In fact, shoppers may move between tribes, researching some purchases carefully and making spontaneous buys on others. And while this research focuses on pre-purchase sharing, social media is also home to a fourth tribe: the “victors” who celebrate successful purchases by sharing news or images of their spoils. Zoom in on a single social network, as we did in our Pinterest study for the Harvard Business Review, and you discern even more granular archetypes.

**MEET THE THREE TRIBES**

**Thinkers**
Thinkers use social when they are contemplating about a purchase, but have not actively begun the research process. 48% of Pinterest purchasers, 60% of Facebook purchasers, and 70% of Twitter purchasers say that when they shared or favorited the item they later purchased, “I already thought about purchasing this specific product,” or “I had not thought about purchasing this specific product but I had thought about purchasing another similar product.”

**Questers**
Questers research their purchase, and share or favorite specific items they are thinking about buying. 22% of Pinterest purchasers, 24% of Facebook purchasers and 21% of Twitter purchasers say that when they shared or favorited the item they later purchased, “I already thought about purchasing this specific product and was researching the purchase.”

**Leapers**
Leapers are inspired by social to make a purchase when they were not even thinking about the product or product category that they purchased. 29% of Pinterest purchasers, 16% of Facebook purchasers and 9% of Twitter purchasers say that when they shared or favorited the item they later purchased, “I had not thought about purchasing this specific product or a similar product.”

_When you shared or favorited this item, were you already thinking of purchasing it? / Asked June 2013_

**The Leaper: Patty**
Patty is retired, and she’s on Facebook several times a day, and Pinterest several times a week. She made her latest Pinterest-inspired purchase at the supermarket: ingredients for homemade Danish pastries. It wasn’t something she’d thought about baking, but when she spotted the recipe on a friend’s Pinterest board, that recommendation was all the encouragement she needed, and she made her purchase within 24 hours.

**The Thinker: Fabiana**
Fabiana, who is in her late 40s, uses both Facebook and Pinterest to get the latest news and ideas on gardening and crafts. She was already thinking about adding a bird feeder to her garden when she stumbled across a hummingbird feeder on Pinterest, and she bought it within a few weeks.

**The Quester: Tom**
Tom’s a young man with a significant income, and he likes to spend that money on quality products. He uses Twitter as part of his shopping process, making some of his online purchases directly from his Android phone. When he tweeted about the ebook reader, he was already actively researching the product, and he made his purchase within a few weeks.
How does social nudge your customer from interest to purchase?

How customers feel about different social networks is a good clue to where your brand will be at home on social media. Each network drives purchasing for a different set of reasons, so you’ll need to find the network that works not only for your products, but also for your promotions.

Social network characteristics as described by users

<table>
<thead>
<tr>
<th>Pinterest users</th>
<th>Facebook users</th>
<th>Twitter users</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s easy to find things that interest me</td>
<td>42%</td>
<td>24%</td>
</tr>
<tr>
<td>It’s inspiring to see what other people post/pin</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>It makes me feel connected to my friends</td>
<td>35%</td>
<td>91%</td>
</tr>
<tr>
<td>It’s useful for ideas and projects</td>
<td>24%</td>
<td>88%</td>
</tr>
<tr>
<td>I get overwhelmed by amount</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>I make more purchases thanks to this site</td>
<td>75%</td>
<td>11%</td>
</tr>
<tr>
<td>I make smarter purchases thanks to this site</td>
<td>64%</td>
<td>28%</td>
</tr>
<tr>
<td>I like seeing what my friends post</td>
<td>63%</td>
<td>59%</td>
</tr>
<tr>
<td>I like seeing what my favorite brands post</td>
<td>80%</td>
<td>42%</td>
</tr>
<tr>
<td>It’s easy to spend hours clicking away</td>
<td>52%</td>
<td>24%</td>
</tr>
</tbody>
</table>

How much do you agree or disagree with the following statements about Pinterest, Facebook or Twitter?

Asked March 2013

The first step to moving your customers towards purchase through social media is to understand what your customers do and don’t like about each social platform they use. But this isn’t enough to predict purchase drivers: it is also essential to ask customers directly about how their use of each social network influences their purchase decisions.

BET ON FACEBOOK

If you’re in a highly peer-influenced category, or if personal recommendations are a major business driver, Facebook’s social focus may be a great fit.

“Pinterest makes it easy to find things that interest me.”

Loves Facebook, but isn’t sure it helps her make smarter purchases.
How did pinning this item influence your decision to buy this product? / Asked March and April 2013
What type of additional information did you obtain about this product? / Asked April 2013

Ask your Customers...

- How does Facebook (or Twitter, or Pinterest, or another network) help them find or evaluate products and services? (Consider offering a set of statements that your customers can agree or disagree with.)
- What kind of information helps move your customers towards a purchase?
- Where do customers want to see deals and coupon codes? How much of your in-store and online sales are driven by sale notifications?
- How big a role do reviews and recommendations play in driving customers from social networks to purchase? Do tips from friends carry more weight than reviews from experts or other customers?

Use Customer Insights To...

- Introduce Products on the Right Social Networks by correlating answers like “It’s how I discovered this product” with the product or product category that yielded the most of these discoveries.
- Select Product Information to include in your social network updates, and to embed in pages that contain “pinnable” images (since these are the pages people will land on if they follow a link from Pinterest).
- Decide Which Sales and Deals to Offer on which networks.
- Refine the Kind of Content You Post to a specific network in order to improve its efficacy as a purchase driver.

“I see new products people recommend that I normally would not know about.”
HOW DOES MOBILE SHOPPING MOVE YOUR CUSTOMERS FROM SHARING TO PURCHASE?

Mobile shopping functions quite differently in relation to in-store shopping than it does in relation to online shopping. Online shoppers may use mobile to make a quick purchase; in-store shoppers can use mobile to engage more thoughtfully, typically in comparison shopping, before they commit.

DEMOGRAPHICS OF THE MOBILE SOCIAL SHOPPER

Were any of these social media-inspired purchases ever made via mobile device (i.e., smartphone, tablet, etc.)? / Asked June 2013

SOCIAL PURCHASING VIA MOBILE

Were any of these social media-inspired purchases ever made via mobile device (i.e., smartphone, tablet, etc.)? / Asked June 2013

35% of people who have made an online purchase after tweeting, retweeting or favoriting an item on Twitter say that they used a mobile device to make all of those purchases.
MOBILE PURCHASING IS ALREADY A BIG PART of the social shopping story. The majority of social shoppers on all three networks reported that at least some of their online social purchases were made with a mobile device; the majority of Twitter purchasers reported that most or all of their purchases were made via mobile. (Not a huge surprise, when you look at the age and tech orientation of Twitter purchasers.)

But mobile is just as crucial to in-store social purchases. You need to know how much your customers are using their mobile phones as part of their shopping experience. While your website analytics can tell you how many customers and purchasers access your site via mobile device, they can’t tell you how many people are standing in your aisles with a mobile phone, reading product reviews or checking prices.

ASK YOUR CUSTOMERS...

• Do they use their mobile phones when they are in your store? What do they use them for: Price checking? Checking in? Picking up a coupon offer or discount code? Looking up product reviews or information?
• Do they use their mobile phones to access your website? What do they use it for: Making a purchase? Researching a purchase? Browsing? Finding a retail store or hours?
• Have they ever shared content about your brand, product or stores using a mobile phone? What did they share? Did they share it by email, or to a social network?
• Which apps, if any, do they use when shopping with mobile? Do you they do their shopping in a browser or in a dedicated app?

ACTION ITEM
Use short, mobile-friendly surveys to send questions about mobile social shopping to your customers while they are in your store.

USE CUSTOMER INSIGHTS TO...

• DECIDE HOW MUCH TO INVEST IN MOBILE DEVELOPMENT, and whether to spend on a responsive site (i.e. one that works well across devices) or on a dedicated mobile app.
• DEVELOP APPROPRIATE OFFERS FOR MOBILE CUSTOMERS, both those in-store (who may be engaged by things like Yelp check-in deals) and those shopping online.
• CALIBRATE HOW AGGRESSIVELY TO COMPETE ON PRICE, in order to manage in-store mobile price-checkers.
• STREAMLINE PARTS OF YOUR PURCHASE PROCESS, so that mobile shoppers can move quickly from interest to purchase.
• ENHANCE YOUR IN-STORE DISPLAYS TO ENGAGE MOBILE SHOPPERS, for example with QR codes.

MOBILE RESEARCH IS ANOTHER TOOL FOR UNDERSTANDING SOCIAL MEDIA CUSTOMERS
Prompt customers to take a survey on their smartphones while in-store.

SOME TWITTER PURCHASES MADE VIA MOBILE
**8 HOW LONG DOES IT TAKE CUSTOMERS TO GO FROM SHARING TO SHOPPING?**

To use social sharing as a driver of sales and insight, you need to know about the sharing-to-purchase timeline for your own customers. For most social purchasing, a week is a long time, and a month is an eternity.

**TIME ELAPSED BETWEEN SHARING AND PURCHASE**

<table>
<thead>
<tr>
<th></th>
<th>Pinterest</th>
<th>Facebook</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within 24 Hours</td>
<td>36%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Between 1-3 Weeks</td>
<td>38%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>More than 24 hours, less than 1 week</td>
<td>10%</td>
<td>29%</td>
<td>20%</td>
</tr>
</tbody>
</table>

*Approximately how much time elapsed between when you shared or favorite this item and when you purchased it? Asked April and June 2013*

**Ideally, you will ask questions** about your customers’ spending cycle over time, and correlate this data with other information you have about your customers’ demographics, interests and buying habits. If you are undertaking longitudinal research with the same group of customers, you have even more options for gathering this kind of data. For example, you could ask those customers to tell you the three most recent items they have shared from your online store or product line-up, and follow up quarterly to ask which of these items (if any) they have subsequently purchased.

**1 week after sharing, roughly**

- **Half** of social media-inspired purchases have already been made

**3 weeks after sharing, more than**

- **80%** of social media-inspired purchases have been made
MAKE THEM LEAP

WHEN IT COMES TO INSPIRING UNPLANNED PURCHASING, PINTEREST IS THE MOST SUCCESSFUL NETWORK.

Yet Pinterest users are the least likely to buy in the first 24 hours. What does it take to inspire leapers, and convert social exposure to spontaneous purchasing? The relative strengths of each network suggest key opportunities.

FINDING

Product information drives purchasing from Pinterest.

Few people say that Facebook helped them figure out where to make their purchase.

Pinterest users are the least likely to say they made a purchase after discovering a sale or deal.

OPPORTUNITY

Share product information along with sale alerts on Facebook and Twitter.

Promote retail locations and “where to buy” information in Facebook updates.

Embed sale, discount and coupon offers in pinned/pinnable images.

ASK YOUR CUSTOMERS...

• How does the time from sharing to purchase vary across social platforms? Do people who share an item on Facebook move to purchase as quickly as people who share on Pinterest?
• Do customers move from sharing to online purchase more quickly or more slowly than from sharing to in-store purchase?
• Which customer groups move quickest from sharing to purchase?

ACTION ITEM

Target your social media outreach to the window when sharers are most likely to purchase.

USE CUSTOMER INSIGHTS TO...

• FINE-TUNE YOUR REMARKETING CAMPAIGNS by showing customers ads for items they have shared during the window when they are most likely to purchase.
• TARGET YOUR SOCIAL MEDIA OUTREACH to the customers who are most likely to make a purchase, during the window when they are most likely to act.
• OFFER DISCOUNTS AND INCENTIVES WITH APPROPRIATE TIME LIMITS so that customers are motivated to buy while they are in their optimal purchase window.
• IDENTIFY THE LENGTH OF TIME YOU HAVE TO ADJUST ADVERTISING BUYS AND STORE DISPLAYS in response to a spike in social media engagement with a specific product.
• PLAN FOLLOW-UP EMAILS AND SOCIAL MEDIA MESSAGES that are timed to refresh interest from customers who have shared on social, and move them to purchase.
• UNDERSTAND THE LIFESPAN OF YOUR CUSTOMERS’ INTEREST and the length of your sales cycle.
CONCLUSION

This report has demonstrated the role of social media in driving a substantial volume of purchasing both in-store and online. Comparing the latest data with research from 2012 shows how quickly this phenomenon has emerged, suggesting that it is only going to grow in importance.

BRANDS AS DIVERSE AS CRICUT, CANON AND CAMPBELL’S have already begun to reap the benefits of social shopping: their products were among the many purchases that were reported in the course of this research. While our research shows the overall patterns that shape these purchase journeys, social sales drivers vary as much as the products themselves.

That is why today’s companies need to understand how social media drives purchasing among their customers, and of their products. Ask your customers the questions raised in this report, and you will find your own path from social to sale.

SOCIAL PURCHASING ON THE RISE

PINTEREST PURCHASERS

<table>
<thead>
<tr>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 in 5</td>
<td>2 in 5</td>
</tr>
</tbody>
</table>

Have you ever purchased an item – either in-store or online – after you pinned / repinned / liked it on Pinterest? Asked March 2012 and March 2013

HOW TO ASK YOUR CUSTOMERS ABOUT SOCIAL PURCHASING

Vision Critical has prepared its own deployment-ready survey, with questions you can use in your next round of customer research. Contact us to receive your copy.

info@visioncritical.com

ASK YOUR CUSTOMERS…

To the best of your recollection, in which product category was the last item you purchased after you tweeted / retweeted / favorited it on Twitter? IN WHICH CATEGORIES DO YOU TEND TO LIKE / COMMENT / SHARE ON FACEBOOK? Approximately how much time elapsed between when you shared / liked / commented on this item and when you purchased it? WHICH TYPE OF WEBSITE OR RETAIL STORE DID YOU BUY THIS FROM? ON AVERAGE, HOW OFTEN DO YOU VISIT OR USE THESE SOCIAL MEDIA SITES? HAVE YOU EVER PURCHASED AN ITEM – EITHER IN-STORE OR ONLINE – AFTER YOU SAW IT ON FACEBOOK? DID SEEING THIS ITEM ON FACEBOOK INFLUENCE YOUR DECISION TO BUY THIS PRODUCT ONLINE? WHEN YOU SAW THIS ITEM ON TWITTER, WERE YOU ALREADY THINKING OF PURCHASING IT IN-STORE? Were any of these purchases ever made via mobile device (i.e. smartphone, tablet, etc.)? IN WHICH CATEGORIES DO YOU TEND TO PIN ON PINTEREST?
ABOUT THE AUTHORS

ALEXANDRA SAMUEL
Vice-President of Social Media, Vision Critical
@AWSAMUEL
Alexandra Samuel is Vice-President for Social Media at Vision Critical, leading the company’s social media business and marketing strategy. Her 20 years of online community experience include leading a 3-year research program on digital government for Don Tapscott, investigating online social capital for Robert Putnam’s Bowling Alone, and founding one of the world’s first social media agencies. She has written for the Wall Street Journal, the Harvard Business Review blog, TheAtlantic.com, and Oprah.com, and is the author of the Harvard Business Review Press ebook series, Work Smarter with Social Media. Alexandra holds a Ph.D. in Political Science from Harvard University.

TRIBE: QUESTER
Latest social purchase: Jeffrey Campbell Piranha shoes, via Pinterest.

DAVID SEVITT
Vice-President of Consumer Insights, Vision Critical
@DSEVITT
David Sevitt is a Vice-President in the Consumer Insights practice at Vision Critical, and for over a decade has provided strategic guidance to clients in the Retail, CPG and Technology sectors. David has extensive experience designing customized and creative research programs that help businesses make more inspired and more profitable decisions. David has an undergraduate degree in Commerce from McGill University and a Masters degree in Journalism from Carleton University.

TRIBE: LEAPER
Latest social purchase: Concert tickets to hear jazz pianist Fred Hersch, tweeted.

LENA LAM
Senior Research Manager, Vision Critical
@LENALAM
Lena Lam is a Senior Research Manager in the Consumer Insights practice at Vision Critical. Her experience includes a diverse range of qualitative and quantitative research methodologies and data analysis techniques, as well as extensive experience in research programs that guide strategic business decisions. Lena has a Bachelor of Commerce in Marketing Management and a Master of Science in Marketing and Consumer Studies from the University of Guelph.

TRIBE: THINKER
Latest social purchase: Ethical Ocean sweatshop-free tee, liked and commented on Facebook.

CHERYL LOH
Graphic Designer
@LOHCHERYL
Cheryl Loh is a recent graduate of the Communication Design program at Emily Carr University. She is the recipient of the Jim Rimmer Scholarship for Design (2011) and the GDC National/Ray Hrynkw Scholarship (2012). Her work has appeared in documentaries, Applied Arts Magazine, and The Vancouver Sun.

TRIBE: QUESTER
Latest social purchase: Movie tickets for the Sign Painters, tweeted.

ABOUT VISION CRITICAL
Vision Critical is the world’s leading provider of insight communities, supporting more than 650 brands worldwide. Our software and services give organizations crucial insights from communities of their audiences, customers and stakeholders – helping them make better decisions more quickly than ever before.

Learn more about us at www.visioncritical.com

RELEASED JUNE 25, 2013 | VISIONCRITICAL.COM/SOCIAL2SALE