

# teenVOGUE

THINK TANK

Insights Start Here.



## Seeing Social Through The Millennial Mindset

**SPRING 2014**

For Millennials, **social media is a self-contained showroom with a unique path-to-purchase**—the multichannel shopper now uses social media to do more than share. She actively participates in the content created not just by peers, but by marketers, to inform her purchasing decisions.

*Teen Vogue's "Seeing Social"* survey explores the role social media plays in the beauty and fashion decision-making process, identifying where, how, and why Millennials engage with social. Key areas include:

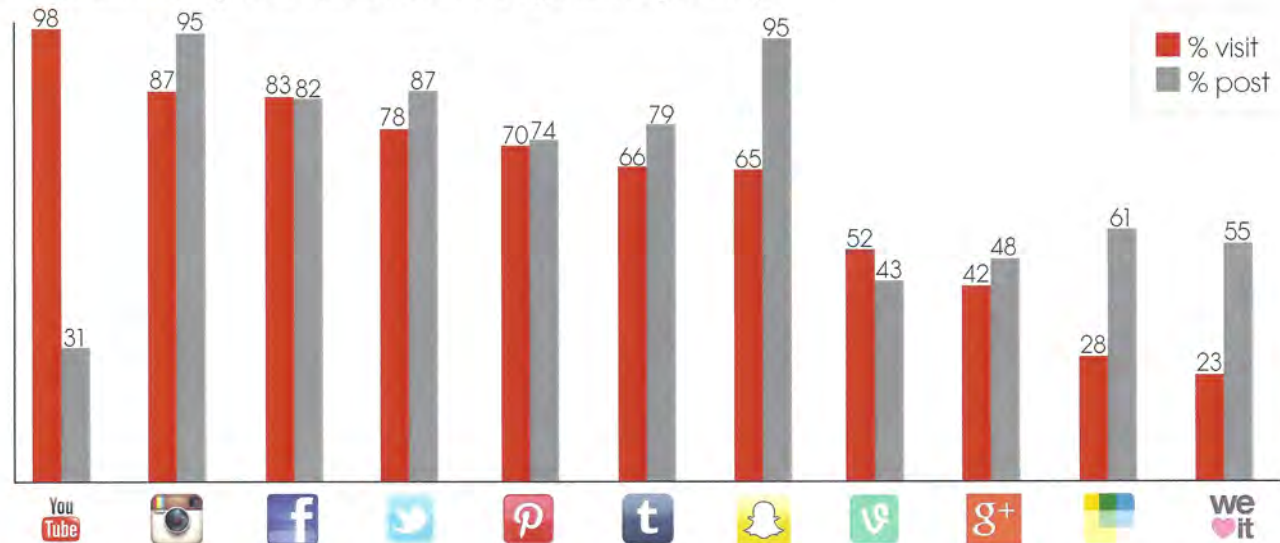
- Performance by platform
- The role social plays in shopping
- The next movement in social media

Fielded March 4–11, 2014, the survey generated 1,074 responses from *Teen Vogue's* IT GIRL community, composed of a U.S. sample of young women age 13–29. The survey was developed by *Teen Vogue's* in-house consumer insights group, *Teen Vogue Think Tank*, and executed by Vision Critical, a market research firm based in Vancouver, BC.

**“Social media” is not a vertical vehicle nor do networks satisfy only one consumer motivation. Each platform occupies a unique space and payoff in the Millennial girl’s social media universe—and in marketers’ KPI strategies.**

## FUNCTIONAL BEHAVIORS

Social media platforms can be easily classified into two distinct camps: “Eyeballs” (high-visit) or “Engagement” (high-participation). Desirable networks like Instagram, Facebook, and Pinterest are both, owning social bandwidth *and* generating activity.



Using this formula, each network can be leveraged by marketers to fulfill the most basic of objectives. However, it is not enough to rely on these metrics alone. **Consumer interests and motivations must be taken into account to fully engage Millennials on social media.**

*“Which topics or activities do you seek out on each of the following social networks?”*

(Top responses)

FASHION	BEAUTY	CELEBRITY NEWS/GOSSIP
Tumblr (78%)	Pinterest (79%)	Twitter (73%)
Instagram (77%)	Instagram (73%)	Facebook (50%)

Average number of personalities followed\*:

Fashion and beauty bloggers	54
Celebrities	54
Designers, editors, and stylists	34

\*Across all networks

## EMOTIONAL DRIVERS

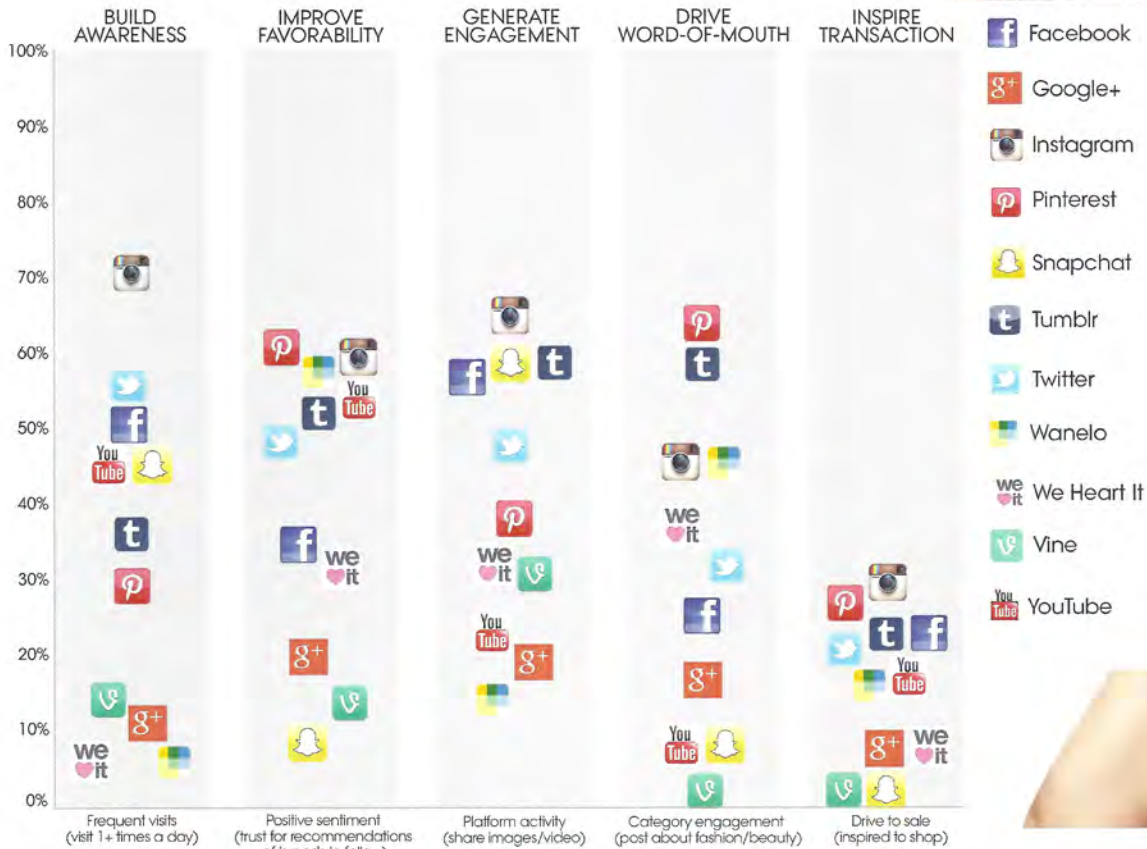
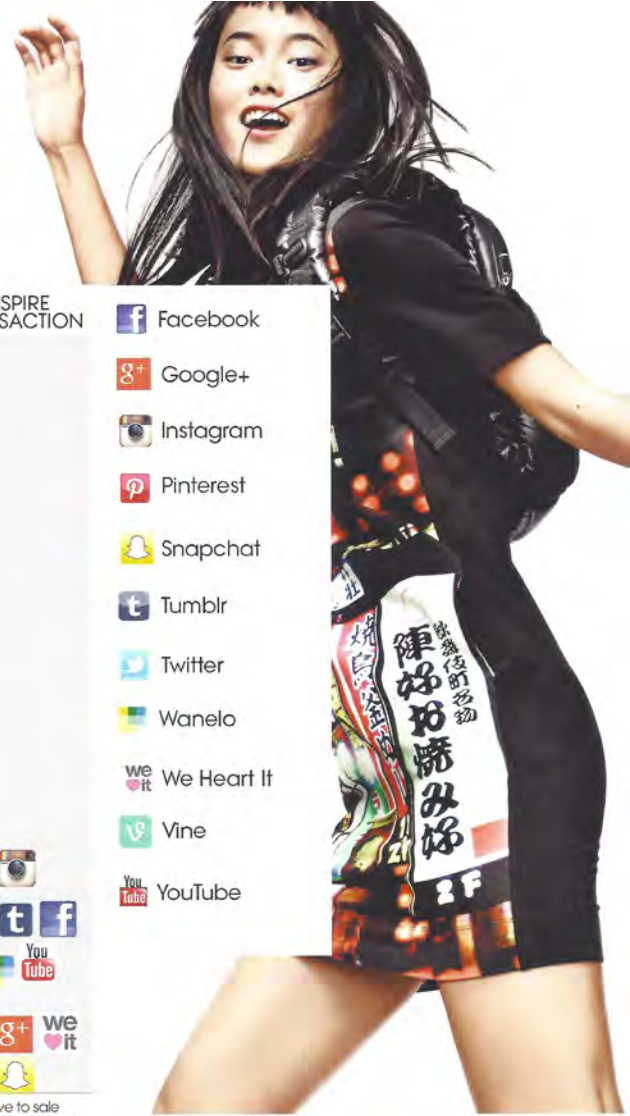
Significant connection hinges on adequately tailoring content and communication style to consumer expectations by platform.

*“How do you feel about yourself when you are active on the following social media networks?”*

CONNECTED	CREATIVE	FUNNY	IN-THE-KNOW
Facebook	Pinterest	Snapchat	Twitter
YouTube	Tumblr	Vine	
Instagram	Instagram		

# MARKETING SOLUTIONS: THE SOCIAL MEDIA MAP

Marrying consumer behaviors with marketing KPI's delivers a **responsive map to social media** that informs strategy and investment.



## ACTION TO TRANSACTION: SOCIAL SHOPPING

Social delivers more than wish-list window shopping—it is the living, breathing home of a “social showroom” for girls that leverages each platform’s strength and point of engagement to enhance the shopping process. **85% of respondents have been driven to purchase something after seeing it on a social media network.** So the post is actually a storefront—and it is just the beginning.

### SEE IT:

- **Instagram** is the #1 platform that inspires respondents to purchase, followed closely by **Pinterest**.

### SEARCH IT:

- When respondents find a fashion or beauty brand they like on social media, they search **YouTube** videos of how to best wear or apply the product (52%).
  - 82% watch beauty tutorials
  - 70% watch fashion how-to's

### SHOP IT:

Before purchase, they engage in “comparison shopping.” By platform, top behaviors include the following.

- |                                     |                  |            |
|-------------------------------------|------------------|------------|
| • Find additional product images:   | <b>Pinterest</b> | <b>48%</b> |
| • Read reviews and recommendations: | <b>YouTube</b>   | <b>43%</b> |
| • Check out sales/deals:            | <b>Facebook</b>  | <b>36%</b> |

**What's Next?** Adoption of social commerce.

- 1 in 4 respondents (26%) have made a purchase directly from a social network.
- 47% would like the ability to purchase directly off of a social feed.



## THE FUTURE OF SOCIAL

Influential young women are seeking to maximize technology's ability to personalize engagement. They want social media to bring them closer to the products and brands that they're seeing on their screens, seamlessly **translating the digital experience to a bricks-and-mortar or online transaction.**

When asked what they would like to see more of from fashion and beauty brands on social media:

- 81% said "more product sampling"
- 65% said "tell me where the closest store is to buy the product I'm looking at"
- 56% said "post more looks and products that make sense for where I live"

According to respondents, **the future belongs to Instagram.** It is the platform most cited as the clear must-have App this year and is the one network that "everyone will be talking about "next year."

#1  
Instagram

"If you had to pick just one social network to use, what would it be?"  
"What is the social network you'll be talking about in the coming year?"

"I love how the pictures each person posts expresses them and shows us how they view the world. It's like seeing the world through different eyes, which is fresh and inspiring." —*Teen Vogue* IT GIRL



Named *Adweek's* Hottest Magazine on Social Media, *Teen Vogue* is uniquely positioned to advise and collaborate with marketers on social media initiatives. The leading monitor of Millennial fashion and beauty enthusiasts in America, *Teen Vogue* attracts a 7.4 million social following across all platforms, reflecting double-digit year-over-year increases on most platforms. *Teen Vogue* engages its community with style programming tailored to network capabilities and the consumer desires identified by ongoing consumer conversation.

**teenVOGUE**  
THINK TANK  
Insights Start Here.

For more information on the social media habits of Millennials, contact your *Teen Vogue* representative or Catherine Makk, Director, Retail and Consumer Insights at (212)286-3835 or [catherine\\_makk@condenast.com](mailto:catherine_makk@condenast.com).