

Ahalogy

2014 PINTEREST MEDIA CONSUMPTION STUDY

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We were recently asked by a client (*that happens to be one of the largest brand marketers in the world*) if we'd seen any data on how Pinterest users consume media and from where they might shift dollars to for this exciting new platform. We couldn't find a good, holistic media study, so we decided to commission one ourselves.

It's a perfect time to understand how Pinterest is changing consumer behavior and media habits, as the company is preparing to launch its Promoted Pins revenue model in the next few months. After all, media budgets are usually a shrinking pie in this economy, so companies must move the dollars from somewhere.

The *Ahalogy 2014 Pinterest Media Consumption Study* examines how active Pinterest users are consuming media, which brands have a right to win on the platform, whom these brands can best reach on Pinterest and how to best reach them.

Whether you are actively considering Promoted Pins or only now setting up your company's Pinterest account, we hope this fresh, comprehensive research helps you understand the potential of Pinterest marketing.

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PINTEREST MARKETING IS WORTHY OF THE HYPE.

Active Pinterest users are young, tech-savvy and have more disposable income than non-users. The most active users are what many marketers are now calling Millennial Moms—they have young children in the home and grew up with smart phones and social media.

Our research confirms that active Pinterest users are active doers and early adopters—those who want to try new things and are looking to try out new products from different brands. They are significantly more likely to try new projects and products than non-users, and about one-half of them have tried more than six new activities because of something they saw on Pinterest.

Interestingly, active Pinterest users watch significantly less TV than non-users and they claim to be moving away from reading traditional print catalogs, newspapers and magazines, replacing that media consumption with Pinterest use. Thirty-nine percent of them are also using Pinterest in place of traditional search engines, such as Google. Marketing insiders and heavy users know that Pinterest isn't social, it's search.

And, Pinterest is mobile. The platform says that 75 percent of activity is mobile and our research notes that nearly 30 percent of active users pull up the app while in-store to guide their purchases. As Pinterest use becomes heavier, users build the app into their real-life shopping habits, and this percentage increases.

Perhaps surprisingly, active Pinterest users are also fairly open to brand activity on the platform. About three-quarters of them say they would prefer to follow and interact with their favorite brands on Pinterest rather than their favorite celebrities or so-called “experts.” Additionally, when asked about Pinterest's upcoming launch of Promoted Pins, users are generally open to Pinterest marketing—as long as it keeps with the spirit of Pinterest and adds value to their lives.

Our research shows that active Pinterest users are ready and willing to be marketed to—as long as brands do it organically. This could be the year for your business to start or accelerate Pinterest marketing.

THE AHALOGY PINTEREST MEDIA CONSUMPTION STUDY METHODOLOGY.

The *Ahalogy 2014 Pinterest Media Consumption Study* surveyed 1,300 males and females ages 15+ across the United States between February 26 and March 11, 2014. Of the 1,300 people surveyed, 500 were active Pinterest users, meaning that they use Pinterest at least once a month. The sample surveyed was nationally representative for age, education, and income, as well as regionally diverse.

The study was conducted by AcuPOLL Precision Research, Inc., a leading marketing and innovation research firm that has worked with two-thirds of the Fortune 500 consumer-facing firms and has conducted online quantitative and in-person “qual/quant” research in 35 countries.

The survey analyzed the impact of Pinterest on frequency of media consumption, particularly magazine readership, and other online and offline readership. It also looked at the impact of Pinterest use on purchase behavior and the usage of key brands among active Pinterest users. The survey also endeavored to understand who active Pinterest users are and how they differ from non-active consumers. These findings were then broken down further by age, gender and amount of Pinterest use, among others.

DEMOGRAPHICS.

MILLENNIAL MOMS THAT MANY BRANDS ARE CHASING.

For this study, we defined an active Pinterest user as someone who logged in at least once a month. So, who is this user, and how are they using Pinterest?

Just more than 22 percent of the U.S. population uses Pinterest as least once a month. That's more than the Hispanic population of the U.S. (17 percent according to the U.S. Census Bureau), and the same percentage of Americans that claim to floss daily according to a Focused Care Dental study.

Active Pinterest users skew younger than non-users, which is not surprising since younger people tend to be more digitally savvy. Forty-nine percent of active Pinterest users are under the age of 40, compared to 34 percent of non-users.

User Age

	NON-USERS	ACTIVE USERS
15 – 29	17%	*29%
30 – 39	17%	*20%
40 – 49	17%	14%
50 – 59	*23%	*21%
> 60	*26%	16%

*Statistically significant at 90% confidence.

Pinterest users also have more purchasing power. They have nine percent higher income than non-users.

User Annual Income

	NON-USERS	ACTIVE USERS
< \$20K	*22%	*18%
\$20 – \$29K	*13%	*11%
\$30 – 37.4K	9%	10%

User Annual Income

	NON-USERS	ACTIVE USERS
\$37.5K – \$49K	11%	11%
\$50 – 59K	9%	12%
\$60 – \$74K	8%	10%
\$75K – \$99K	10%	10%
\$100 – \$124K	9%	7%
> \$125K	9%	10%

*Statistically significant at 90% confidence.

Active users are on Pinterest a lot – and they’re happy about it. Fifty-three percent of them log in to the platform on both weekdays and weekends and spend an average of 26 minutes per visit on the site. Additionally, 77 percent of them are “very satisfied” with their Pinterest experience and 80 percent are “likely to recommend” the platform to a friend.

The most active Pinterest users are what many marketers refer to as **Millennial Moms**. We say this because 79 percent of active Pinterest users are female. And of the most active, those who log in to Pinterest daily are even younger than active users as a whole, with 63 percent of daily users being under 40 years old.

Daily Active User Age

	ACTIVE USERS	DAILY ACTIVE USERS
15 – 29	*29%	*35%
30 – 39	*20%	*28%
40 – 49	14%	12%
50 – 59	*21%	16%
> 60	16%	9%

*Statistically significant at 90% confidence.

Daily Pinterest users are also significantly more likely to have children in the home—36 percent of them have kids under the age of 17 living with them. This is the generation that grew up with social media and smartphones.

Daily Active User's Children

	ACTIVE USERS	DAILY ACTIVE USERS
<i>Have children age 17 or younger</i>	26%	*36%
<i>Don't have children</i>	*74%	*64%

*Statistically significant at 90% confidence.

Daily use of Pinterest is also increasing. Seventy-three percent of daily users (*compared to 44 percent of active users*) say their Pinterest use has increased since first joining the site. Their usage has increased because they've gotten better at navigating the platform, and they've found so many great projects and ideas on Pinterest that they're constantly looking for more.

MEN. BEHIND BUT BEGINNING TO CATCH UP.

A common perception is that Pinterest is primarily for women, and by usage statistics, this appears to be true, with only 14 percent of active monthly users on Pinterest being male. Although male users on the platform are lagging, they're growing – men are 36 percent more likely to have joined Pinterest in the last six months than women.

The active male Pinterest user is a slightly different demographic than the active female Pinterest user. Male Pinterest users are 14 percent more likely to be single and living alone, and also 16 percent more likely to be a homeowner. They also make more money than active female Pinterest users. Fifty-eight percent of them make more than \$50,000/year and 51 percent of them are employed full-time.

They also use Pinterest differently than females. The active male Pinterest user is nine percent more likely to pin to the platform from outside websites using the Pin It button, and 10 percent more likely to pin their own content or creations. Males are also more likely than females to try new baby/kids' products, childrens'

products/toys, bars/clubs, sports, cocktails and travel destinations because of something they saw on Pinterest.

When males log in to Pinterest, they're 12 percent more likely than women to be searching or planning for a long-term project, and when they find that project, they're probably not going to follow the directions step-by-step. Forty-two percent of them glance at the directions, but then find their own way, compared to 29 percent of women.

Active male Pinterest users also wield more purchase power on the platform. They're 20 percent more likely to have purchased a product either online or at a traditional retail store because of something they saw on Pinterest.

The most popular categories men browse on Pinterest are:

- Food & Drink
- Technology
- DIY/Crafts
- Humor
- Gardening

The Pinterest categories where the largest discrepancies occur between men and women in terms of time spent browsing on Pinterest are:

- Technology
- Cars & Motorcycles
- Men's Fashion
- Sports
- Videos

ACTIVE DOERS. EARLY ADOPTERS THAT LOVE TO TRY & BUY NEW THINGS.

Active Pinterest users are people who are constantly trying new things and buying new products. Sixty-six percent of them consider themselves “early adopters,” or the first among their friends to try new products. These are the people who are forming new habits and choosing new brands.

They’re also significantly more likely than non-users to try out new food and cocktail recipes, hair care, makeup and skincare products, fashion trends, exercise regimens, baby care products and children’s products/toys. In general, they’re more likely to try something new in ANY category, over a non-user. And, virtually ALL (98 percent of) Pinterest users have tried something new that they saw on the platform.

Additionally, almost one-half of active users (47 percent) have tried more than five Pinterest-inspired projects. The Food & Drink category is one of the most popular on Pinterest and **68 percent of active users have tried a new recipe because of something they saw on the site.**

Trying new activities increases with users that are on Pinterest daily and with moms who are active on Pinterest.

- **61%** of active moms on Pinterest have tried more than five Pinterest-inspired activities
- **66%** of daily Pinterest users have tried more than five Pinterest-inspired projects

Number of Pinterest-inspired projects tried

	ACTIVE USERS WHO HAVE DONE A PINTEREST PROJECT	ACTIVE MOMS WHO HAVE DONE A PINTEREST PROJECT	DAILY USERS WHO HAVE DONE A PINTEREST PROJECT
0 – 5	*53%	*39%	*34%
6 – 10	*16%	*19%	*23%
11 – 20	*17%	*21%	*18%
21 – 30	6%	9%	10%

Number of Pinterest-inspired projects tried

	ACTIVE USERS WHO HAVE DONE A PINTEREST PROJECT	ACTIVE MOMS WHO HAVE DONE A PINTEREST PROJECT	DAILY USERS WHO HAVE DONE A PINTEREST PROJECT
31 – 40	1%	3%	3%
41 – 50	5%	6%	8%
> 51	1%	3%	4%

**Statistically significant at 90% confidence.*

And when it comes to purchase power, Pinterest users wield a lot.

- **38%** of active users have purchased online or at a traditional retail store because of something they saw on Pinterest
- **43%** of moms active on Pinterest have purchased online or at a traditional retail store because of something they saw on Pinterest
- **53%** of daily users have purchased online or at a traditional retail store because of something they saw on Pinterest

Daily users and moms active on Pinterest are trying new things even more often than active users.

- **53%** of moms active on Pinterest try a new Pinterest-inspired activity at least once a month
- **64%** of daily users try a new Pinterest-inspired activity at least once a month

Frequency of Pinterest-inspired projects

	ACTIVE MOMS	DAILY ACTIVE USERS
<i>Never</i>	0%	1%
<i>Less than once a year</i>	4%	2%
<i>Once or twice a year</i>	7%	4%
<i>Once every 4 – 6 months</i>	9%	12%
<i>Once every 2 – 3 months</i>	*27%	*17%
<i>Once a month</i>	16%	*17%
<i>Once every 2 – 3 weeks</i>	*30%	*28%
<i>Once a week or more often</i>	6%	*19%

**Statistically significant at 90% confidence.*

Daily users are more likely to use Pinterest to complete specific activities. They're 7 percent more likely to search the platform with a specific project in mind, and 25 percent of them have tried more than 20 Pinterest-inspired projects.

MEDIA USE. PINTEREST USERS ARE HARDER TO REACH THROUGH TRADITIONAL ADVERTISING.

Active Pinterest users are early adopters and heavy media consumers. They read twice as many types of magazines on a regular basis than non-users (*4 different types versus 2.4 different types*), and on average are members of three or four other social media sites. However, they also indicate that they're starting to shift away from watching TV and reading print material while opting to use Pinterest instead.

Active Pinterest users already spend two or three fewer hours each week watching TV than non-users. Moms who are active on Pinterest are even less likely to watch TV than active users and active female users. On average, moms active on Pinterest claim to watch two hours less of TV each week than other active female Pinterest users, and almost three hours fewer of TV each week than other active Pinterest users in general.

In place of traditional media use, active Pinterest users also indicate that:

- **43%** of them are using Pinterest in place of reading magazines
- **49%** of them are using Pinterest instead of browsing catalogs

Pinterest is also beginning to replace traditional search engines for a lot of active users. Thirty-nine percent of active users indicate that they choose Pinterest over traditional search engines, such

as Google. They are increasingly turning to Pinterest because of its strength in key categories (like Food, Fashion and Décor), its visual layout, and the ability to browse through user-organized boards. Obviously, Google is still dominant in this area, but it's clear that Pinterest has become less of social network and more of an optimized visual search engine.

Pinterest in place of other media behaviors

	ACTIVE USERS	ACTIVE MALE USERS	*ACTIVE FEMALE USERS
<i>Catalogs</i>	*49%	*38%	*52%
<i>Internet</i>	*46%	*33%	*50%
<i>Magazines</i>	*43%	*30%	*46%
<i>Social media</i>	*42%	*38%	*43%
<i>Search engines</i>	*39%	*32%	*40%
<i>Shop online</i>	*35%	*36%	*35%
<i>Online publications</i>	*32%	*34%	*32%
<i>Watch cable or satellite TV</i>	*30%	*30%	*29%
<i>Watch network TV</i>	*29%	27%	*30%
<i>Read daily newspaper</i>	*28%	25%	*29%
<i>Read Sunday newspaper</i>	*28%	29%	*28%
<i>Check email</i>	22%	27%	21%

*Statistically significant at 90% confidence.

MOBILE & RETAIL. BRANDS CAN WIN WITH MOBILE AND SOCIAL.

For brands focusing on scaling social and mobile, Pinterest is an opportunity to maximize marketing return on investment for both technologies at once.

We often hear Pinterest users say they turn boards into shopping lists and use the Pinterest app in-store to find recipe ingredients or fashion ideas. There's obviously a huge marketing opportunity to be in-hand when and where people are making purchase decisions, so we wanted to know how many people are really doing this.

It's important to note that Pinterest says that 75 percent of activity occurs on mobile (*phones and tablets*). In our study, 28 percent of active users say they have pulled up pins on their mobile devices to guide in-store purchases. As Pinterest use gets heavier, this percentage grows. Forty percent of moms active on Pinterest have pulled up pins on their mobile devices to guide in-store purchases and 52 percent of daily users have done so as well.

BRANDS & CATEGORIES. USERS ARE MORE OPEN TO BRAND ACTIVITY ON PINTEREST THAN YOU MIGHT EXPECT.

Many brands know that their audience is using Pinterest, but they're not sure how to use the platform. To gauge the opportunity, we first chose to look at where Pinterest users are spending most of their time on the site.

The top browsed Pinterest categories for active users (*across genders*) on Pinterest are:

- Food & Drink
- DIY & Crafts
- Home Décor
- Holidays & Events

The top browsed Pinterest categories for daily users (*across genders*) are:

- Food & Drink
- DIY & Crafts
- Home Décor
- Their home feed

Most frequently browsed Pinterest categories:

ACTIVE USERS	DAILY USERS
Food & Drink	Food & Drink
DIY & Crafts	DIY & Crafts
Home Décor	Everything
Everything	Home Décor
Home Feed	Home Feed
Holidays & Events	Holidays & Events
Design	Health & Fitness
Gardening	Design
Hair & Beauty	Hair & Beauty
Women's Fashion	Women's Fashion
Health & Fitness	Humor
Humor	Gardening
Gifts	Quotes
Quotes	Popular
Products	Gifts
Photography	Products
Film, Music & Books	Photography
Popular	Film, Music & Books
Travel	Outdoors
Outdoors	Travel
Animals	Illustration & Posters
Art	Kids
Illustration & Posters	Animals
Place Boards	Art

Most frequently browsed Pinterest categories:

ACTIVE USERS	DAILY USERS
Weddings	Education
Kids	Place Boards
Science & Nature	Tattoos
Education	Science & Nature
Technology	Weddings
Tattoos	Videos
Videos	Geek
Geek	Technology
Celebrities	Celebrities
Architecture	History
History	Sports
Sports	Architecture
Men's Fashion	Men's Fashion
Cars & Motorcycles	Cars & Motorcycles

The Pin It button is a Pinterest feature that makes it easy to pin content a user finds on the web and not directly through Pinterest. About one-third of active Pinterest users have the Pin It button installed in their browser so that they can pin content from their favorite sites. But 72 percent of active female and 69 percent of active male users would find it helpful to have the Pin It button installed on their favorite websites.

An opportunity exists here for brands to make their content more visible via Pinterest. By installing the Pin It button on their website, a brand allows users to easily save their content to Pinterest for later, and makes that content available for repins and viral sharing.

Surprisingly, Pinterest users are more open to brand marketing activity on Pinterest than you might expect. However, **only 27 percent of active users are currently following any brand on the platform.**

- **83%** of active users would rather follow their favorite brand than their favorite celebrity
- **73%** of active users would rather follow their favorite brand of beauty products than their favorite makeup artist
- **70%** of active users would rather follow their favorite brand of hair care products than their favorite celebrity hair stylist

- 67% of active users brand of baby products than baby expert
- 67% of active users favorite designer than favorite fashion icon

Which type of page would you rather follow on Pinterest?

	<u>ACTIVE USERS</u>
<i>Favorite brand / store</i>	*83%
<i>Favorite celebrity</i>	17%
<i>Favorite designer</i>	*67%
<i>Favorite celebrity fashion icon</i>	33%
<i>Favorite baby expert</i>	33%
<i>Favorite brand of baby products</i>	*67%
<i>Favorite homecare expert</i>	50%
<i>Favorite brand of cleaning products</i>	50%
<i>Favorite make-up artist</i>	27%
<i>Favorite brand of beauty products</i>	*73%
<i>Favorite celebrity hair stylist</i>	30%
<i>Favorite brand of hair care products</i>	*70%

*Statistically significant at 90% confidence.

From a pre-selected list, we asked Pinterest users which brands they would most like to follow on the platform and the results were pretty similar across active and daily users.

The top five brands active users most want to follow are:

- Etsy
- Victoria's Secret
- Jo-Ann Fabric's & Crafts
- Starbucks
- Target

Brands users would be most interested in following:

ACTIVE USERS

Etsy
Victoria's Secret
Jo-Ann Fabric
Starbucks
Target
REI
Ralph Lauren
PetSmart
Walmart
Crayola
L'Oréal
Huggies
Macy's
Olay
Kroger
Nike
Home Depot
Hershey
Pampers
Hilton Hotels
Pantene
Best Buy
Kraft
Lowe's
Nestlé
Delta Airlines
Lands' End
Bounty
Other

PROMOTED PINS. USERS WILL ACCEPT, IF IT ADDS VALUE.

Promoted Pins are Pinterest's first foray into paid advertising and will provide brands greater opportunities for getting noticed on Pinterest. They're set to launch with a very small number of leading brands later in 2014.

We asked active and daily users how they felt about the impending Pinterest marketing model and the results were even between both user groups. Users are open to Pinterest marketing as long as it adds value.

About three-quarters of Pinterest users (*73 percent of active users and 72 percent of daily users*) are neutral to positive about the arrival of Promoted Pins. The biggest concern for users who are negative toward paid advertising infiltrating Pinterest is that 45 percent of them worry that ads won't fit with the platform's spirit of sharing authentic, organic content.

This breaks down as:

- **18%** think ads seem out of place, don't fit with Pinterest
- **16%** think ads often aren't relevant to them
- **11%** don't like content being forced on them

How do active users feel about Promoted Pins?

	ACTIVE USERS AFTER SEEING THEM	ALL ACTIVE USERS
<i>0-3, I don't mind them</i>	32%	31%
<i>4-6, I'm neutral</i>	*39%	*42%
<i>7-10, I can't stand them</i>	28%	27%

**Statistically significant at 90% confidence.*

What don't you like about Promoted Pins?

	ACTIVE USERS
<i>I don't like ads / I don't want to see ads</i>	*20%
<i>They seem out of place / They don't fit with Pinterest</i>	*18%
<i>They're often not relevant to me</i>	*16%
<i>I don't like content being forced on me</i>	*11%
<i>They are annoying / stupid / dumb</i>	10%
<i>Nothing</i>	7%
<i>Not sure / Don't know</i>	6%
<i>More geared towards marketing / selling</i>	5%

*Statistically significant at 90% confidence.

Survey respondents shared comments such as:

"I worry that advertisements may take over instead of just seeing good ideas."

"If they're relevant they're fine."

"One thing I love about Pinterest is that there are no advertisements, which seems virtually impossible these days. I think too many promotions might take away from the artsy/down to earth and inspirational feel Pinterest has."

"I have mixed feelings about every site being used for marketing but it's okay if I'm interested in the topic."

"It's not that I don't like them, it's more of whether or not they would be relevant to me."

"They're okay - I just don't think of Pinterest as a marketplace venue - but it does make sense - but only if the items are handcrafted maybe."

If brands are smart, they'll deploy Promoted Pins with an optimized content strategy. Our research and field experience show that content is king.

- **59%** of active Pinterest users usually click through pins to blogs/photos/articles rather than 27% that click through to brand or shopping sites
- **65%** of daily Pinterest users usually click through pins to blogs/photos/articles rather than 25% that click through to brand or shopping sites
- **71%** of moms active on Pinterest usually click through pins to blogs/articles/photos rather than 23% to brand or shopping sites

Destination when clicking through pins

	ACTIVE USERS	ACTIVE MOMS	DAILY ACTIVES
<i>Blog</i>	46%	61%	54%
<i>Brand or product site</i>	18%	14%	18%
<i>Store or shopping site</i>	9%	9%	7%
<i>Other social media site</i>	9%	5%	8%
<i>Photo sharing site</i>	9%	7%	8%
<i>Magazine site</i>	3%	1%	3%
<i>Newspaper site</i>	1%	3%	2%
<i>Other</i>	5%	0%	1%

WHAT'S NEXT FOR YOUR BRAND ON PINTEREST?

We think this research makes the case for brands to invest in reaching and converting their target audience through Pinterest. Thanks to Promoted Pins, Rich Pins, and further innovation from Pinterest in the months ahead, there will be plenty of new opportunities to take advantage of the platform's potential.

Perhaps the biggest challenge for businesses is to think differently when it comes to Pinterest. Too many brands start by applying Facebook habits and endlessly repeating “Pin to Win” contests. Think search—not social—when it comes to Pinterest activity, and instead of gaming the system with giveaways and paid pinners, focus on creating and curating killer content that Pinterest users loves.

A few tips for getting started:

- Find your audience. If you're selling motorcycles to 65-year-old male retirees, Pinterest may not be your best digital strategy. But, if you're looking for Millennial Moms, or if Pinterest is a fit for you to identify points of market entry (your consumer is planning a wedding, a home remodel, prepping for the holidays, etc.) then the platform is a natural place for you to spend marketing resources.
- Embody your categories. Are you a beauty, fashion, home décor, DIY or fitness brand? Then you're a natural fit for the platform. If not, be willing to scale your content to be the right fit for Pinterest. A financial institution could very well succeed on Pinterest with the right content. Pinning interest rates and mortgage tips might not get a ton of engagement, but sharing home decor and DIY ideas for the newlyweds that will be coming to you for a mortgage could win you business.
- Hone your content. Content is king – especially on Pinterest. Our insights show that you need to be pinning quality content 10-15 times/day to reach all of your users. Additionally, you need to provide an engaging and authentic experience after the click.
- Enlist expertise to take your strategy to the next level. At Ahalogy, we help your brand succeed on Pinterest by sourcing proven content, spotting trends, optimizing pins for scheduling and performance, site analytics and our pay-for-performance model.

ABOUT AHALOGY.

Ahalogy is a marketing solution powered by technology that scales results while reducing your effort. We believe technology can deliver marketing with meaning, and we do so by making Pinterest work for you.

Pinterest is about discovery and search, so we bring the content, technology and know-how that optimizes your results. We believe in aligning our business results with yours. That's why our client relationships are typically pay-for-performance or cost-per-action contracts. In fact, we're the only Pinterest technology company that works this way.

Ahalogy will lead content strategy, pin optimization, insights and analytics. Whether using our content or yours, we will prove our formula while only charging you for results we earn.

Ready to crack the code of content and Pinterest marketing? Shoot us a note at info@ahalogy.com or visit us at ahalogy.com.