Social media in the US

GWI's report on the latest social media trends in the US

GWI.

In this report

This Social report provides the most important insights on the world of social media in the US, from keynotes on how attitudes are changing, to the very latest figures for platform engagement.

Click the dots to navigate

Methodology & definitions

When reading this report, please note that we focus on GWI USA, which surveys over 20,000 internet users in the US aged 16+ each quarter, in addition to supplementary data from our ongoing global quarterly Core research. We also draw on GWI Zeitgeist, a recontact study that we carry out monthly in 9 markets.

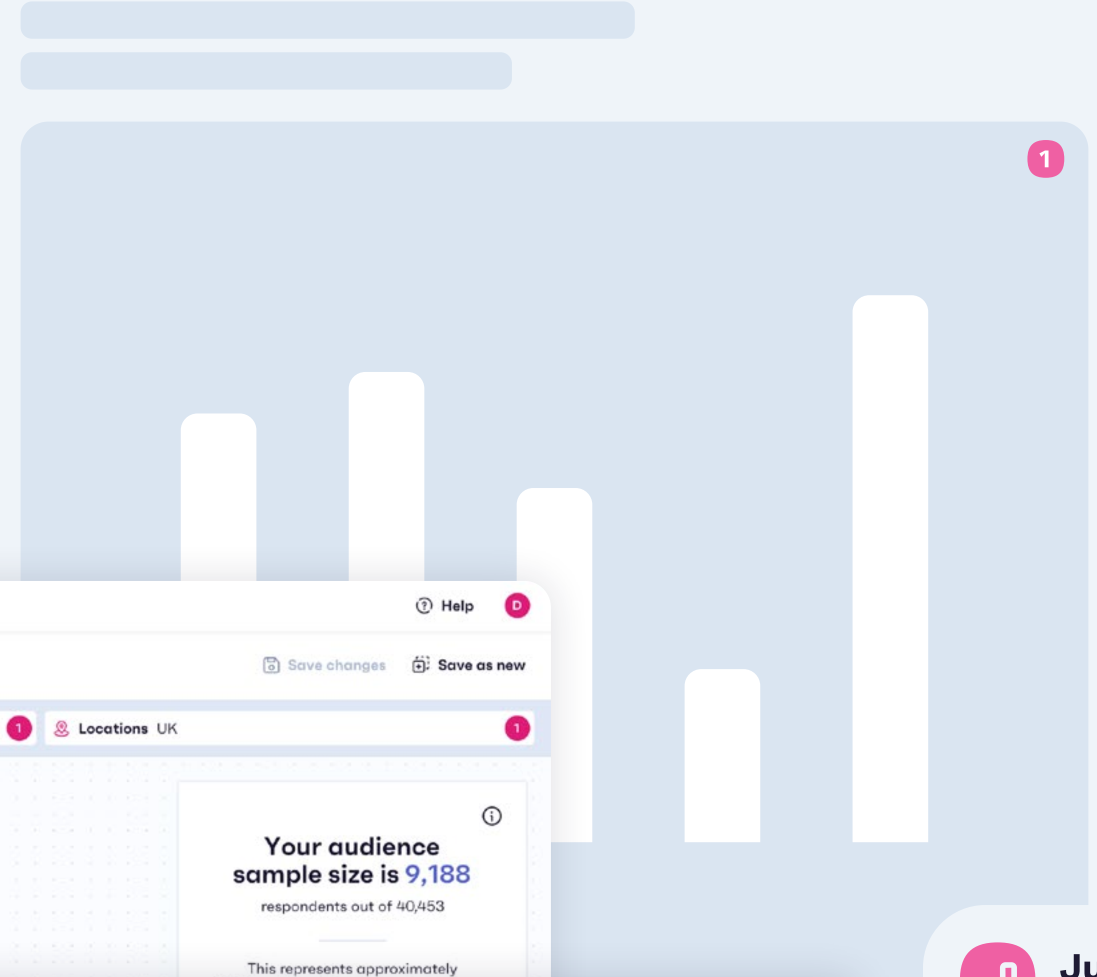
GWI Core is carried out among internet users aged 16-64 in 48 markets. Our figures are representative of the online populations of each market, not its total population. According to our own projections, 90% of the US population aged 16+ are internet users, so it's fair to say our data reflects the online population of this market. However, in many countries in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean that online populations are more young, urban, affluent, and educated than the total population.

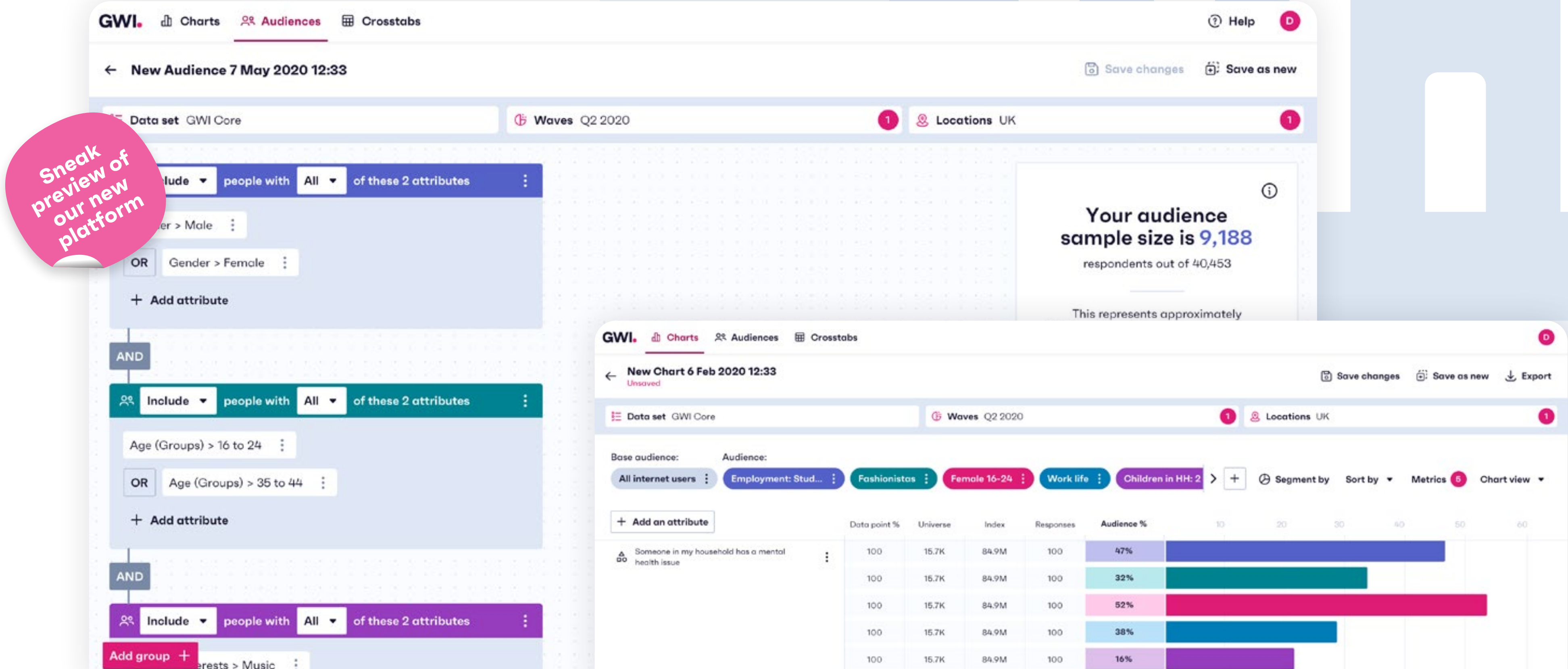
Each year, GWI interviews over 700,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile; hence the sample sizes presented in the charts may differ as some will include all respondents, and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet.

Throughout this report, we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Discover the data on our **platform**

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.





1 **Each of the graphs is numbered**

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Key insights

Social engagement is wavering

Q1 2021 boasts the highest average figures on record for US social media usage, as lockdowns forced consumers to find ways to fill their free time. While engagement has plateaued for younger consumers, our latest Q4 data shows older consumers have kept social media in favor.

More TikTokers are scrolling away

Since Q4 2020, the number of consumers using TikTok monthly has grown by nearly 50%. Despite its youthful reputation, engagement has grown most among Gen X (+79%) and baby boomers (+147%). Its popularity doesn't show any signs of slowing and older consumers will have a leading role.

New contenders in the messaging space

Data privacy is a growing focus, with increasing use of privacy-centered DuckDuckGo and encrypted messaging services. With WhatsApp growing in the last year, and Discord and Telegram making big leaps, their engaged messaging communities are a strong option for marketers.

Stories provide growing interaction opportunities

While less stories are being posted, the number of consumers swiping up on Instagram stories is on the rise, and Facebook too. With significant growth among Gen X (+24%) and baby boomers (+33%) on Facebook Marketplace/Instagram Shopping, utilizing the latest story tools will help keep platform users engaged.

01

Social media in the US

What makes the US unique

Despite being the home of the original social media giants, Americans aren't the most active users of their networks. They spend 11 minutes less per day on social media than the global average, with users from the Middle East, Africa, and Latin America, far exceeding it. The percentage of heavy social networkers is also lower than the global average, and North American consumers are the most likely in the world to say they're using social media less than they used to.

Facebook is the most popular social media platform in the world, with Instagram coming in a close second. In the US, Facebook is used by over 7 in 10 consumers, far outnumbering Instagram. Yet, Americans stand out most for using apps like Reddit, Snapchat, and Imgur; almost a quarter here care less about impressing on social media than they used to, and these sites alleviate the pressure some feel by allowing them to create temporary or community-based posts.

A notable exception to the global trend, Facebook Messenger is the preferred messaging service in the US. WhatsApp has global popularity, and despite its mass adoption, consumers in the US are nearly 1.6x less likely than the average consumer to use the messaging service.

Alongside Latin America (+45%) and in Europe (+33%), TikTok has been the fastest growing social platform in the US, growing by 33% since Q4 2020. And excluding China, Americans are 69% more likely than the global average to say TikTok is their favorite social media service. Marketers should be confident that it's now a go-to social platform, with viral trends such as **#TikTokMadeMeBuyIt** being viewed 8.5 billion times by users.

Over 2 in 5 social media users have 5+ social media services

1

	Average time spent on social media (hh:mm)	% of heavy social networkers	Most popular social media platform*	Most popular messaging service*
Globally	02:29	15	Facebook	WhatsApp
US	02:18	17	Facebook	Facebook Messenger
Latin America	03:34	34	Facebook	WhatsApp
Asia Pacific	02:17	10	Facebook	WhatsApp
Europe	02:05	14	Facebook	WhatsApp
Middle East & Africa	03:34	31	Facebook	WhatsApp

Facebook

WhatsApp

Facebook Messenger

*Outside China

GWI Core Q3 2021

199,419 social media users aged 16-64, and 174,874 outside China

Peak pandemic engagement is now declining

Overall, time spent on social media has increased since Q4 2020, with US consumers spending an extra 7 minutes per day using social platforms.

US states have enforced lockdown measures at various points since early 2020, which led to growth in time spent on social media, as consumers were stuck at home with time to fill. But as US consumers got back outdoors, we saw their social media habits waver. From Q4 2020 to Q1 2021, average time spent on social media increased by 12 minutes to 02:16, though it's continued to decrease since then. Like the global trend, usage has fluctuated since lockdown peaks, but it's ultimately leveled off among younger groups.

In contrast, older consumers have retained their pandemic increases the most. Now, they're using more platforms, owning more devices, and doing more online shopping than ever before. Sponsored posts and ads on social media are the channels with the fastest growth for discovering new brands among social media users aged 55-64 (since Q4 2020). The biggest losers? Newspaper ads and catalogs/brochures. The pandemic may have accelerated digital adoption, but also, turned the tide on traditional media.

COVID-19 led to a "**once in a lifetime**" surge in engagement for the digital economy. If New Year's resolutions are anything to go by, a quarter of participants in the US have said they intend to spend less time on social media in 2022, a trend our data follows. With a growing battle for **users' attention**, basic metrics such as last clicks or views may become old news. If **Google** defaulting to data-driven attribution is anything to go by, marketers may look to tweak their social strategies to see how consumers really interact.

2

How time spent on social media has changed through the pandemic

Average time social media users in each generation spend on social media in a typical day (hh:mm)

GWI USA Q4 2020-Q4 2021 92,149 US social media users aged 16+

02

The top performing platforms

Keeping on trend with US Gen Z

Facebook is the most popular social media platform in the US.

In the US Gen Z are nearly 1.4x less likely to use Facebook than the average social media user. Instagram is their preferred platform, although the gap between the two has shrunk since Q4 2020. Their preference makes sense when you consider their motivations for using social media. While baby boomers over-index most for using social media to read the news and stay in touch with friends or family, Gen Z stand out most for using it to follow influencers, find content, or see updates from their favorite brands.

TikTok has transformed the digital landscape in recent years. Initially a favorite among younger audiences, older consumers are joining it in droves. The number of Gen X/baby boomers using TikTok at least once a week has doubled since Q4 2020, which is something for marketers to keep an eye on. With TikTok being the most popular social media platform in the US for finding products to buy, brands could look to follow the likes of **Ryanair**, **Duolingo**, and even **FC Spartak Moscow** for good examples of how to maximize their potential in the short-form space.

Brands approach TikTok more freely than Instagram, as there's less pressure on curating the look of a profile. Duolingo has become a trailblazer in how to speak to Gen Z. Trends may come in thick and fast, but this allows them to engage users with tongue-in-cheek humor, reactive content, and features of their office staff. They even joke around with other verified accounts on the platform like Ocean Spray, Levi's, Shopify, and even the Empire State Building – keeping it purposeful, but personal.

Most used social media platforms in the US

% of US social media users who use the following services at least weekly

GWI USA Q4 2021 18,990 US social media users aged 16+

New disruptors in the messaging space

Facebook Messenger is the most popular messaging service in the US. Its usage has marginally declined since Q4 2020, with the Facebook platform following suit. The messaging service is most popular with consumers from the Midwest, aged 35-44, and with lower earners. Whereas, younger tech-savvy consumers are adopting new messaging services, with data privacy a major motivator.

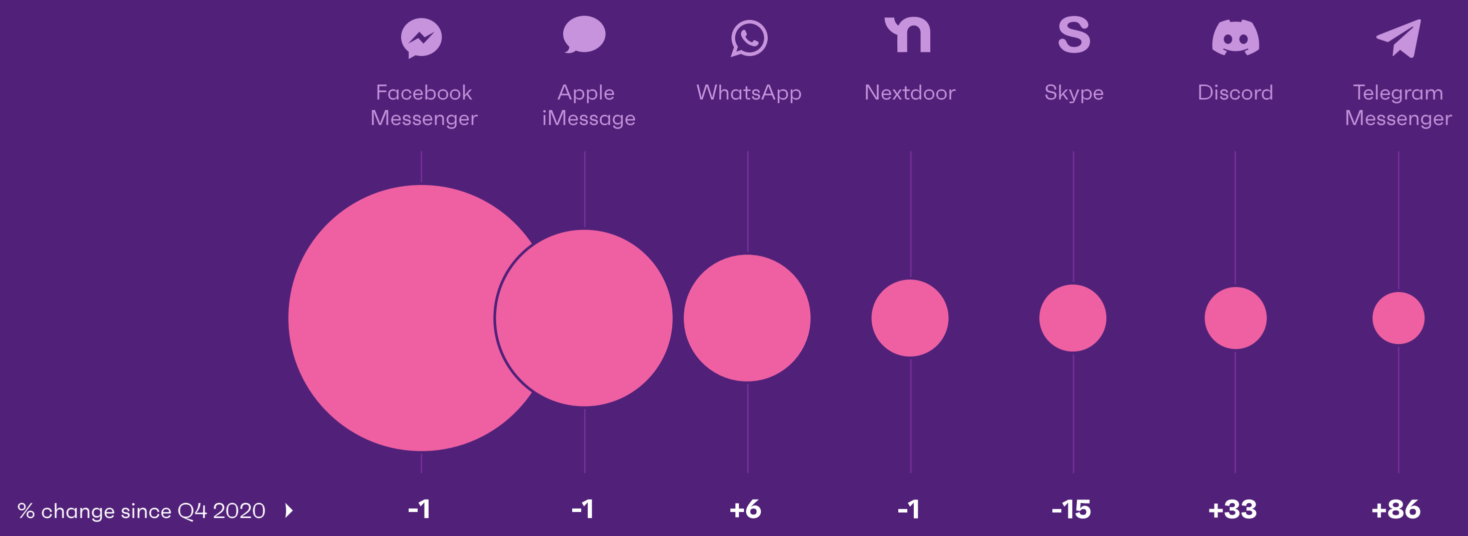
Google is the most popular search engine in the US, but use of the **privacy-focused** search engine DuckDuckGo has increased 16% among social media users since Q4 2020. It's mostly used by Gen Z and follows a trend of consumers becoming more protective of their digital behavior. WhatsApp is well-liked for its end-to-end encryption, and has seen a 6% growth in use since Q4 2020. But the biggest movers are Discord (+33%) and Telegram (+86%).

Discord has long been popular with gaming communities, but is gaining traction with more mainstream audiences, growing to **350 million users** in 2021. 10% of Discord users and 16% of Telegram users have interacted with a brand on a messaging app in the last month, producing higher engagement than users of Facebook Messenger. Popular for its data privacy and encryption, marketers are using these platforms to get their communities engaged with their **business**, with a similar approach to mailing lists, Twitter accounts, or Facebook pages.

Companies have a great opportunity to explore these spaces, as they're the most popular messaging apps for brand interactions in the US. Consumers are likely to want to be kept in the know, providing the content posted is relatable, light-hearted, and informative.

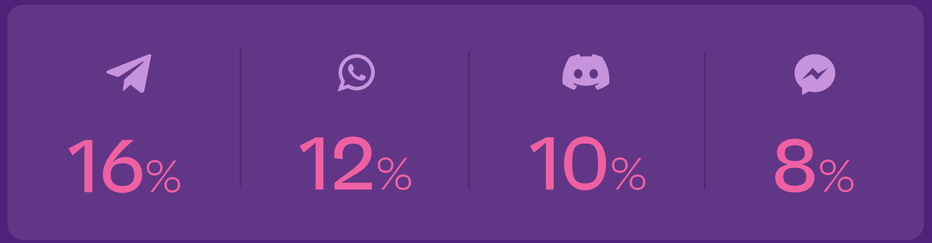
New disruptors in the messaging space

% who have used the following in the last month



The potential for brand interactions on messaging services

% of social media users who have interacted with a brand on a messaging app in the past month



GWI USA Q4 2021; GWI Core Q3 2021

18,990 US social media users aged 16+; 23,727 US social media users aged 16-64

03

Keeping tabs on behavioral trends

Why short-form video is on trend

Accelerated by the pandemic, social platforms have been rushing to integrate short-form content into their feeds. TikTok's meteoric rise exceeded the precedent set by Vine, and in the last two years we've seen YouTube Shorts and Instagram Reels attempt to combat the pull of TikTok's attention-grabbing feed.

The number of monthly Reels users on Instagram has increased by 25% from Q4 2020, showing that short video formats are well in favor. Users of IGTV & Reels are 1.5x more likely to think social media is good for society, and 1.9x more likely to be vocal about brands because of social media. As a consumer group more likely to advocate for brands online, it's important for marketers to understand who this audience is.

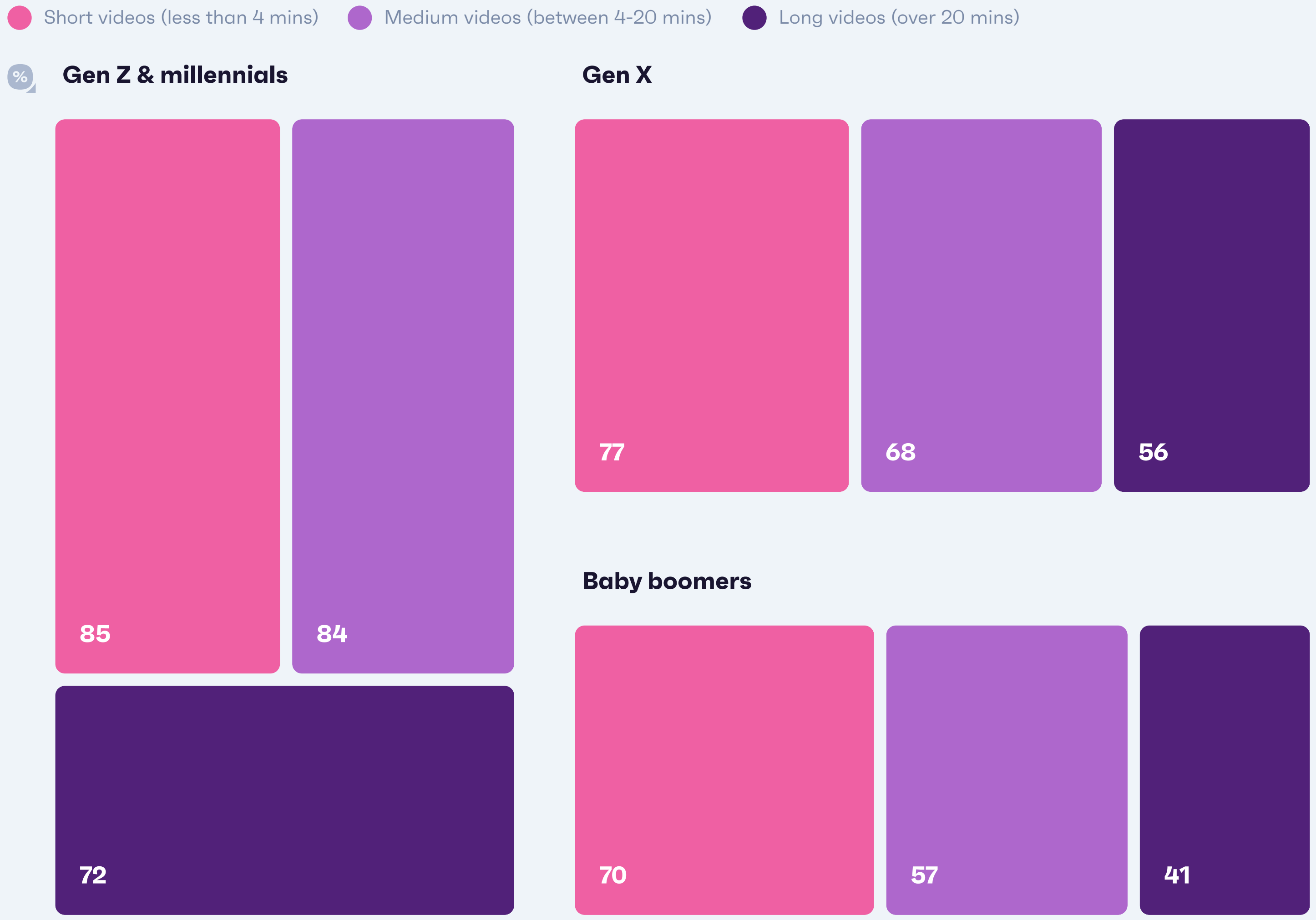
IGTV/Reel users' self-perceptions differ greatly to the average US social media user. They like to stand out, over-indexing most for liking to be the center of attention, being influenced by what's cool or trendy, and wanting their lifestyle to impress others.

But even for all those aspirational qualities, the online personas that resonate most with consumers have changed drastically during the pandemic. The **curated online self** has declined in popularity, ushering in a trend of more down-to-earth and spontaneous content creation. Who would have thought a 21 year old train-spotter would become the face of a **Gucci and North Face** range? If you need evidence of the successes that authenticity can bring you from short-form video, take a note from British social media star **Francis Bourgeois**.

Brands and online personalities can tap into demand with content that stands out for being authentic, emphasizing diversity and self-expression – a recipe that many are already following to great success.

Short-form video reigns supreme, but longer videos are still popular among younger consumers

% of US social media users in each age group who have watched the following in the last month



GWI Zeitgeist August 2021 1,470 US social media users aged 16-64

The power of social stories

Stories have left their mark on most, if not all, of today's main social platforms, from swapping faces on Snapchat to sharing successes on LinkedIn. Half of Instagram, Snapchat, and Facebook users create or react to a social media story at least monthly, an increase of 4% since Q4 2020.

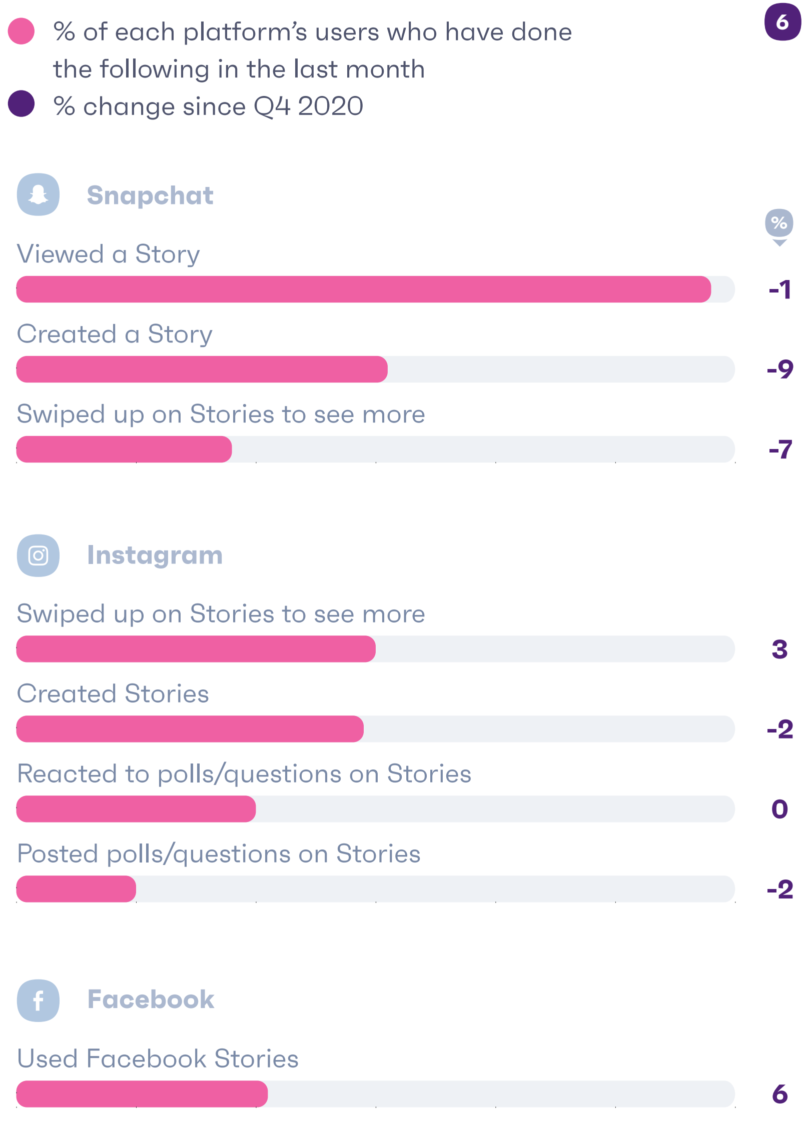
The number of users uploading stories to Instagram and Snapchat has decreased though, and significantly for Snapchat. However, Facebook Stories are only expanding in this part of the world, and Instagram users are swiping up on stories more than ever.

Before **October 2021**, only verified accounts or accounts with 10,000 followers could access web links on Instagram Stories. Now, the "swipe up" links are replaced with link buttons and made available to all, benefiting creators and businesses of all sizes on the platform. Affiliate marketing searches on **Google** peaked in Spring/Summer 2021, and US expenditure in the sector is expected to exceed **$8 billion** in 2022. With the popularity of micro- and nano-influencers growing among brands, the platform's successes may look to grow further.

Compared to the average US social media user, Instagram Story users are over 1.3x more likely to think their finances will improve in the next six months. With more swiping up on Stories, and increased financial optimism, there are compelling reasons for brands to invest in this space. The trick for marketers is to make best use of feature updates, making consumers participate and feel involved with the brand. This could be done by teasing new products or articles with a web link for more information, should users wish to learn more, or offering light-hearted quizzes and polls to entertain them.

Users prefer reacting to Stories

6



GWI USA Q4 2021

11,900 Snapchat users, 20,555 Instagram users, 29,333 Facebook users in the US aged 16+

04

Speaking of social commerce

Social commerce is on the rise

According to Mastercard Recovery Insights, December **eCommerce sales** in the US increased 13.5% year-on-year, and in 2022, retailers will look at different platforms and tactics to reach hyper-connected consumers, which will only boost innovation.

Social media marketing is nothing new, but ad spend in the digital space is only rising, as competition for consumer attention hots up. Pinterest users are the most likely of the major social media platforms to engage with promoted or sponsored posts on social media, and their engagement has increased over the last year. The same can be said for Facebook users who, despite engaging the least of the major platforms, have seen the greatest increase. Despite this, there's good evidence to suggest marketers might benefit from investing more in an organic or affiliate strategy. The youngest users in our survey – 16-24s – reported declines in paid media engagement on social media during the mid part of last year. Although this has now rebounded, it goes to show the importance maintaining a responsive social media strategy to keep pace with evolving behaviors.

The number of Facebook and Instagram users in the US who have used Facebook Marketplace or Instagram Shopping Bag has increased 18% since Q4 2020. Consumers often use Instagram as a place to discover new brands and find inspiration because of its visual design and ease of navigation. Facebook is more popular with those ready to buy, with easy-to-find user reviews, website links, and customer support all easily accessible from brand posts or pages.

Social commerce levels the playing field between online giants and smaller brands, which for consumers will mean access to more products, from more stores, without inconveniencing their scroll through social media.

Pinterest users are the most engaged with paid social in the US

% of each platform's users who have clicked on a promoted/sponsored post on a network in the last month

	%
Pinterest	18
Reddit	18
TikTok	17
Snapchat	17
Instagram	17
LinkedIn	16
Twitter	16
Facebook	15

GWI Core Q3 2021 23,727 US social media users aged 16-64

Social commerce is on the rise

% of social media users in each generation who have used Facebook Marketplace/Instagram Shopping in the last month

	%	% change since Q4 2020
Millennials	31	+9
Gen X	29	+24
Gen Z	22	+9
Baby boomers	19	+33

GWI USA Q4 2021

18,990 US social media users aged 16+

Marketing in the metaverse

Since rebranding from Facebook to **Meta** in late October, the tech giant's vision of a VR future has caused a lot of intrigue. Marketers often favor **Facebook** for its self-serve testing tools, rolling out features such as dynamic experiences and organic A/B testing in Q4 2021. Efforts to develop the metaverse will only extend these capabilities further, as businesses and consumers invest and entrust in a virtual future.

3 in 10 US social media users know what the metaverse is, more than users in France, Germany, Italy, Japan, or the UK. However, there's less enthusiasm to get involved in this part of the world. Over 7 in 10 of those who are aware of the term would consider participating in 7 countries, but this drops to 37% in the US. This is possibly because few Gen Zs here understand what it is (19%), so awareness campaigns targeting this group could benefit brands betting on this space.

It's unknown quite what the future of the metaverse will look like, but for now, the one thing we can be sure of is that you might need to invest in a headset to see it.

Keeping up with the Americans

GWI USA is the data set that helps brands keep pace. Representing 240 million people, this ongoing study was built to make you reactive.

Find out more

Appendix

1 On an average day, how long do you spend on social media? • How often do you visit or use these services?

2 On a typical day, how much time do you think you spend on social media and messaging services?

3 How often do you visit or use these services? (At least weekly)

4 How often do you visit or use these services? • Which of the following actions have you done online in the past month? (Interacted with a brand on a messaging app)

5 In the last month, I have watched a short online video (less than 4 minutes long) about... • In the last month, I have watched a medium-length online video (between 4 and 20 minutes long) about... • In the last month, I have watched a long online video (over 20 minutes long) about....

6 What have you done on Snapchat/Instagram/Facebook in the last month?

7 Which of the following actions have you done online in the past month? (Clicked on a promoted/sponsored post on a social network)

Notes on methodology

GWI USA

Figures in this report are drawn from GWI USA, GWI's online research among internet users aged 16+ in the US Because we conduct our research online, we represent the internet-using part of the US population only. According to our own projections, 90% of the US population aged 16+ are internet users.

Sample size

This report draws insights from GWI USA's Q3 2021 wave of research, with a US sample of 20,560 respondents.

Representation and quotas

Each year, GWI interviews over 80,000 internet users aged 16+ in the US (or 20,000 per quarter) via an online questionnaire for our GWI USA dataset. This is representative of an estimated 240 million internet users in the US aged 16+. To ensure our sample accurately reflects the make-up of the US internet population aged 16+, we set quotas on age, gender, race/ethnicity, income, and regional location. These quotas are calculated using a number of demographic research sources, including the US Census Bureau and Pew Research Centre. During each wave of research, responses are weighted based on the age, gender, race/ethnicity and income of the respondent.

Language and cultural indicators

Separate from asking about racial identity, we also ask about Hispanic identity. Any respondent is able to identify as Hispanic, regardless of their answer to the racial identity question. Within the Hispanic group, we monitor language preferences to ensure we achieve a good balance of those identifying as Spanish-dominant vs English-dominant. We interview a minimum of 2,500 Hispanic respondents each quarter. Multicultural questions are shown only to Hispanic, Black/African American and Asian American respondents. All respondents choose whether they want to complete the survey in Spanish or English.

Mobile

GWI USA has been designed so that all questions are mobile-friendly. Respondents are therefore able to complete the survey via mobile, tablet, PC/desktop or laptop/notebook. This means respondents take the same version of GWI USA regardless of the device they are using.

GWI Core

Figures in this report are drawn from GWI's online research among internet users aged 16-64. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

Sample size

This report draws insights from GWI's Q3 2021 wave of research across 47 countries, with a US sample of 24,692 respondents.

Our research

Each year, GWI interviews over 700,000 internet users aged 16-64 across 47 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Our quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

Mobile survey respondents

From Q1 2017 on, GWI has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, **click here**.

Internet penetration rates across GWI's markets

Because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe and North America to lows of around 20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case in North America, much of Europe and places in APAC such as Japan and Australia.

Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. In some Middle Eastern, African and Asian countries (e.g. India, Indonesia), we would also expect a gender-based skew towards males. Generally, younger internet users are more active and engaged with a lot of the behaviors and services tracked by GWI, which means % scores will typically be higher in low-to-medium-penetration markets.

Get in touch

CHASE BUCKLE
HEAD OF GLOBAL TRENDS
chase@gwi.com

TOM HEDGES
TRENDS ANALYST
thedges@gwi.com