

5 charts showing where people (and advertisers) would go after TikTok

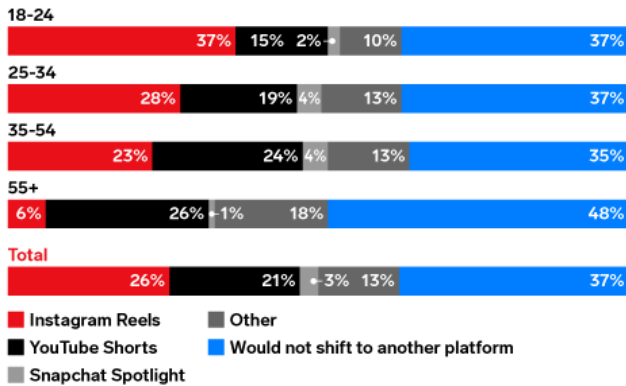
Article

If TikTok gets banned (and it's a very big "if"), advertisers need to know where consumers will go. Instagram and YouTube would likely benefit, but OTT TV like Netflix could also see gains. Advertisers may even branch out to other categories entirely, like retail media. Here are five charts showing what could happen.

1. Instagram Reels are in the lead

Short-Form Video Platforms US TikTok Users Would Switch to if TikTok Is Banned, Nov 2022

% of respondents in each group



Note: n=2,500 ages 18+; numbers may not add up to 100% due to rounding
Source: Cowen, "Cowen Survey: Assessing Beneficiaries If TikTok Is Shut Down in the US," Dec 7, 2022

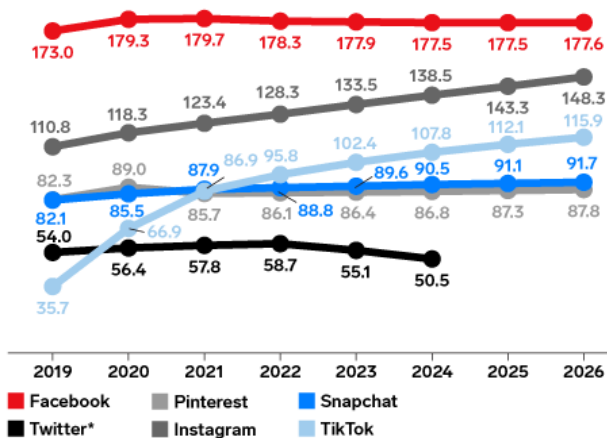
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TikTok users said they would replace TikTok with Instagram Reels, which was closely followed by YouTube Shorts, according to Cowen. Some 37% of people say they have no plans to shift to another platform in the event of a TikTok ban, but considering overall time spent with digital video in the US will be over 3 hours per day on average this year, it's likely these users would also pivot.

2. Facebook and Instagram are still ahead of TikTok in users—probably

US Social Network Users, by Platform, 2019-2026

millions



Note: internet users of any age who use each social network via any device at least once per month; *due to the current uncertainty surrounding Twitter, our forecast ends in 2024
Source: eMarketer, Dec 2022

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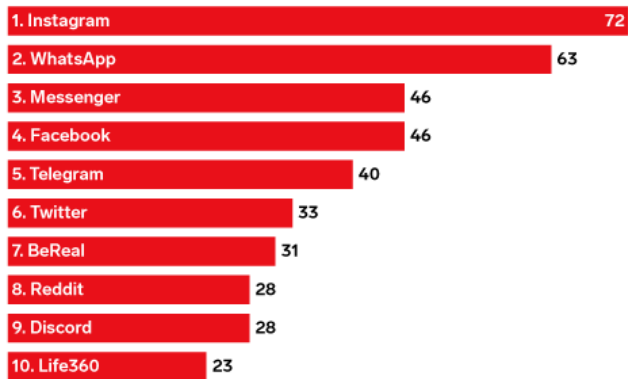
A pivot to Reels, which are supported on both Instagram and Facebook, makes sense, because over 130 million users already frequent both platforms, according to our forecast. But TikTok may have Instagram beat in use.

The platform announced it had 150 million monthly active users last week. But it's unclear if that's an average or a specific month's use. That number also likely includes business, duplicative, and spam accounts, meaning the real number of people scrolling TikTok is likely lower.

3. Instagram also leads in downloads

Top 10 US Mobile Social Media Apps, Ranked by Downloads, 2022

millions



Source: Apptopia, "Worldwide and US Download Leaders 2022," Jan 4, 2023

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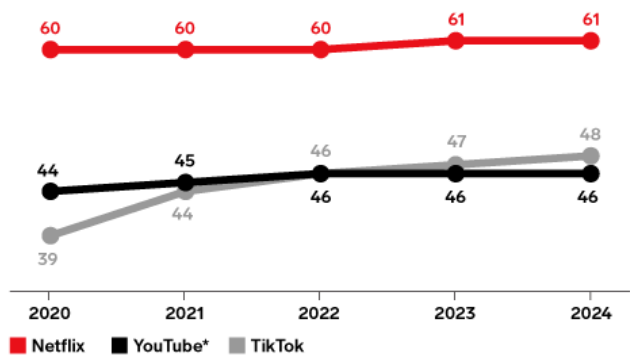
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Instagram was the most downloaded social media app in the US last year, according to Apptopia. TikTok is not on this list, because [Apptopia now classifies](#) the site as an entertainment platform rather than a social media one.

Considering TikTok serves digital videos, that classification makes sense. But would TikTok users want to replace an entertainment app with a social one like Instagram? In the event of a ban, they may not have another option.

4. Speaking of entertainment platforms ...

Average Time Spent per Day With Netflix, TikTok, and YouTube* by US Adult Users, 2020-2024 minutes



Note: ages 18+ who access and watch content on each platform at least once per month; includes all time spent on each platform regardless of device or multitasking; *includes YouTube TV
Source: eMarketer, April 2022
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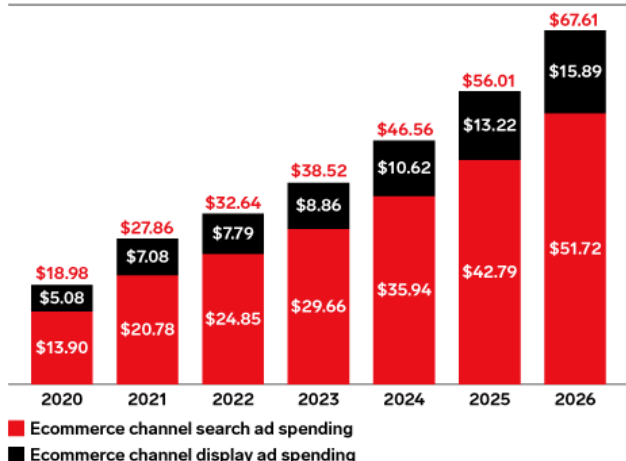
Last year, [TikTok surpassed YouTube](#) in average time spent per day by US users, according to our forecast. With time spent on TikTok increasing, the app could start to replace Netflix next as it encroaches on a wider range of media formats than just social.

More people use YouTube than TikTok. If TikTok went away, they'd probably spend more time on YouTube. But people could also end up spending more time with other forms of media, including OTT TV formats like Netflix.

5. Ad dollars could branch out to other categories

US Ecommerce Channel Ad Spending, by Format, 2020-2026

billions



Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce; examples include advertising on Amazon, Walmart, and eBay; excludes advertising on social networks or search engines; includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms
Source: eMarketer, Oct 2022

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While social media ad spend slows, **retail media** ad spend is climbing. **Retail media could indirectly benefit** from a TikTok ban, according to Insider Intelligence principal analyst Jasmine Enberg.

Whether TikTok gets banned or not, advertisers should look not only at where users are spending their time, but at where ad spend goes the furthest. Right now, retail media looks like a pretty good option.

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