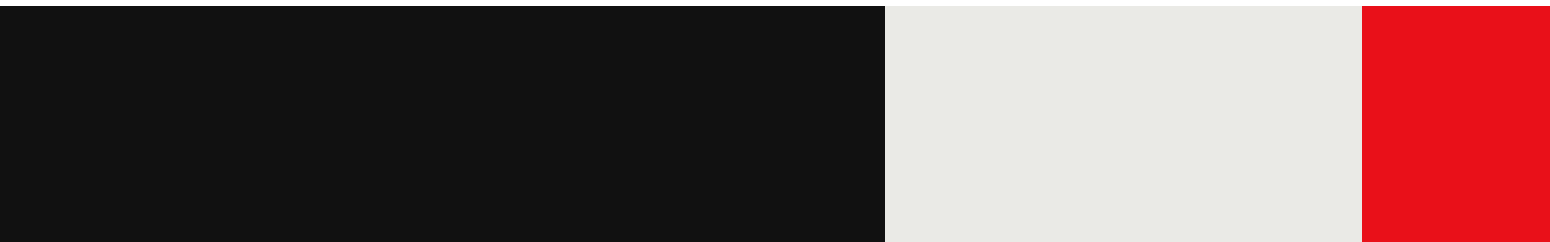



# 5 charts that explain the new era for social media

## Article



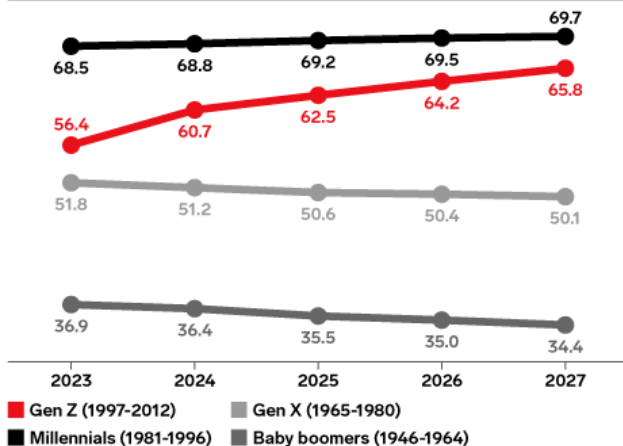
The old form of **social networking may be dying**. But our forecast shows people spend more time on social platforms, so marketers need to be aware of what the new era of social media looks like. Gen Z and TikTok certainly dominate social media headlines, but Meta maintains a stronghold, even as it struggles to make new endeavors like Threads take off.

Here are five charts outlining the new era of social media.

### 1. Gen Z approaches millennial levels of social network use

## US Social Network Users, by Generation, 2023-2027

millions



Note: internet users who use a social network via any device at least once per month  
Source: eMarketer, May 2023

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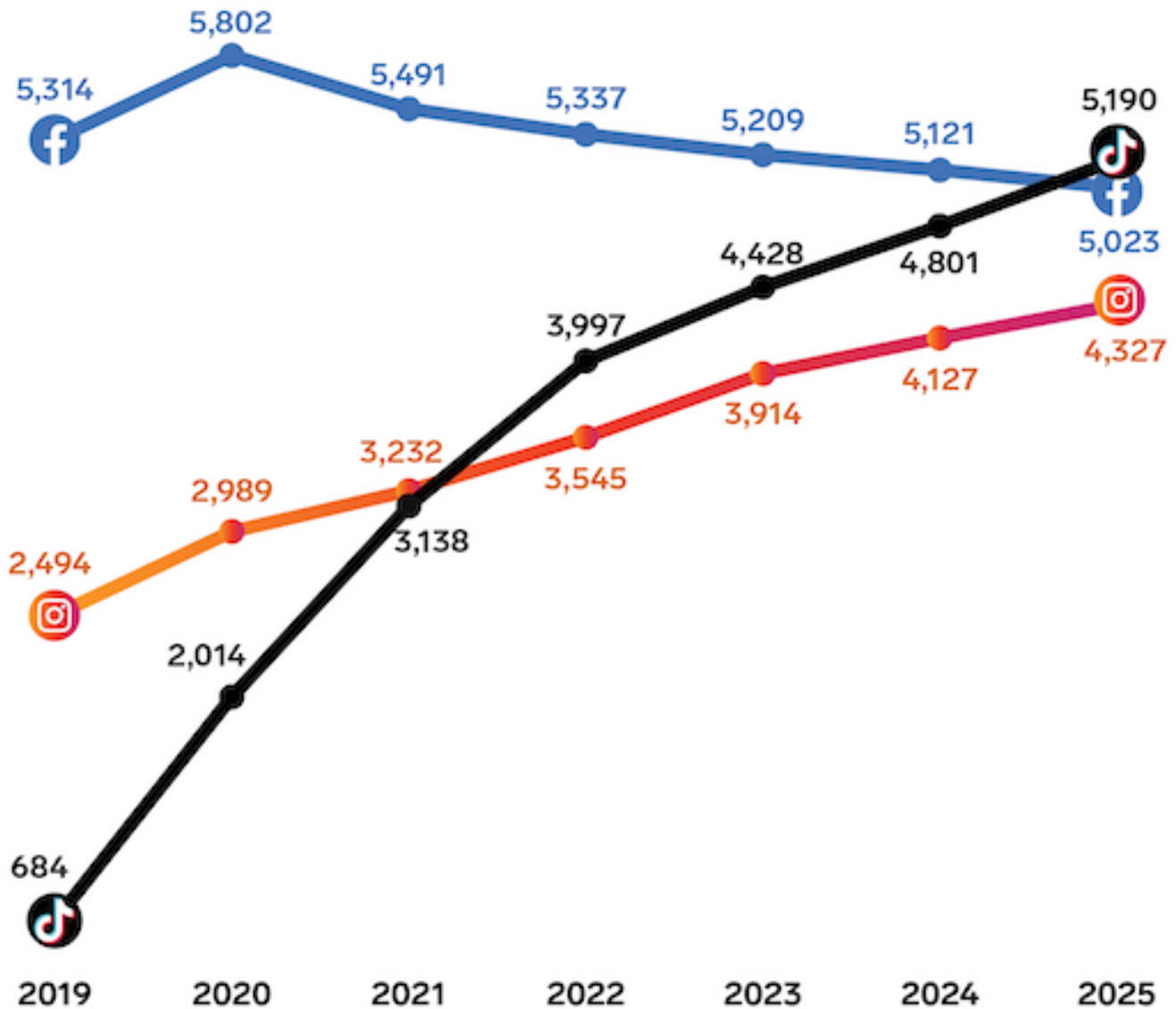
Don't forget "the Facebook generation" yet. Millennials still make up 30.0% of **US social network users** (68.5 million), according to our forecast. But Gen Z accounts for 24.7% (56.4 million) and growing.

Marketers should keep an eye on how Gen Z is using social media (think TikTok, Stories, and a dislike of paid ads) because those behaviors will shape social's future. But keep in mind, millennials haven't gone away. They're still using social media and engaging with influencers and ads, and marketers need to make sure they keep these older users in mind even as they zero in on TikTok and Gen Z.

## 2. TikTok is almost on top

# TikTok Passed Instagram in Total Daily Minutes in 2022 and Will Pass Facebook in 2025

millions of minutes per day among the US adult population



Note: ages 18+; includes all time spent via any device

Source: Insider Intelligence | eMarketer, June 2023

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TikTok already has Instagram beat in total minutes per day that US adults spend on the platform and will pass Facebook in 2025, according to our forecast. And those figures don't account for the amount of time teens are spending on the platform.

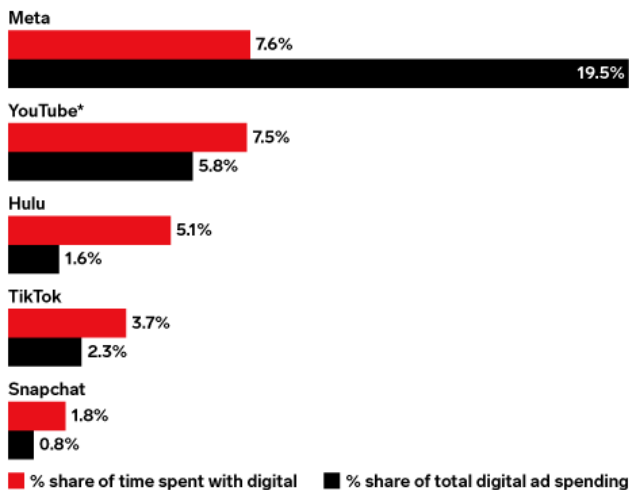
Both Facebook and Instagram are ahead of TikTok in number of US users, with 177.9 million and 135.2 million, respectively, compared to TikTok's 102.3 million. But TikTok has more US Gen Z users (45.8 million) than Facebook (30.9 million) or Instagram (45.5 million), according to our forecast.

Expect TikTok to continue to shape trends, especially for young people.

### 3. But ad spending still heavily leans toward Meta

#### Share of Digital Time Spent per Day by US Adults vs. Share of US Digital Ad Spending, by Platform, 2023

% share of time spent with digital and % share of total digital ad spending



Note: ages 18+; average time spent per day with select media platforms includes usage via any device; Meta includes all time spent on both Facebook and Instagram; YouTube includes YouTube TV; Hulu includes Hulu + Live TV; digital ad spending 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; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites; paid advertising only; excludes payments to influencers or other creators to produce sponsored content; includes branded content amplified as paid media; Meta includes Facebook and Instagram ad revenues; excludes revenues reported under Meta's Reality Labs segment; \*represents gross ad revenue  
Source: Insider Intelligence | eMarketer, H1 2023

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Insider Intelligence | eMarketer

US adults spend 7.6% of their average **time with digital media on Meta platforms**, but advertisers spend an overwhelming 19.5% of their digital ad dollars with Meta, according to our forecast. This high ratio of ad dollars to time spent is not the same on YouTube, TikTok, or Snapchat.

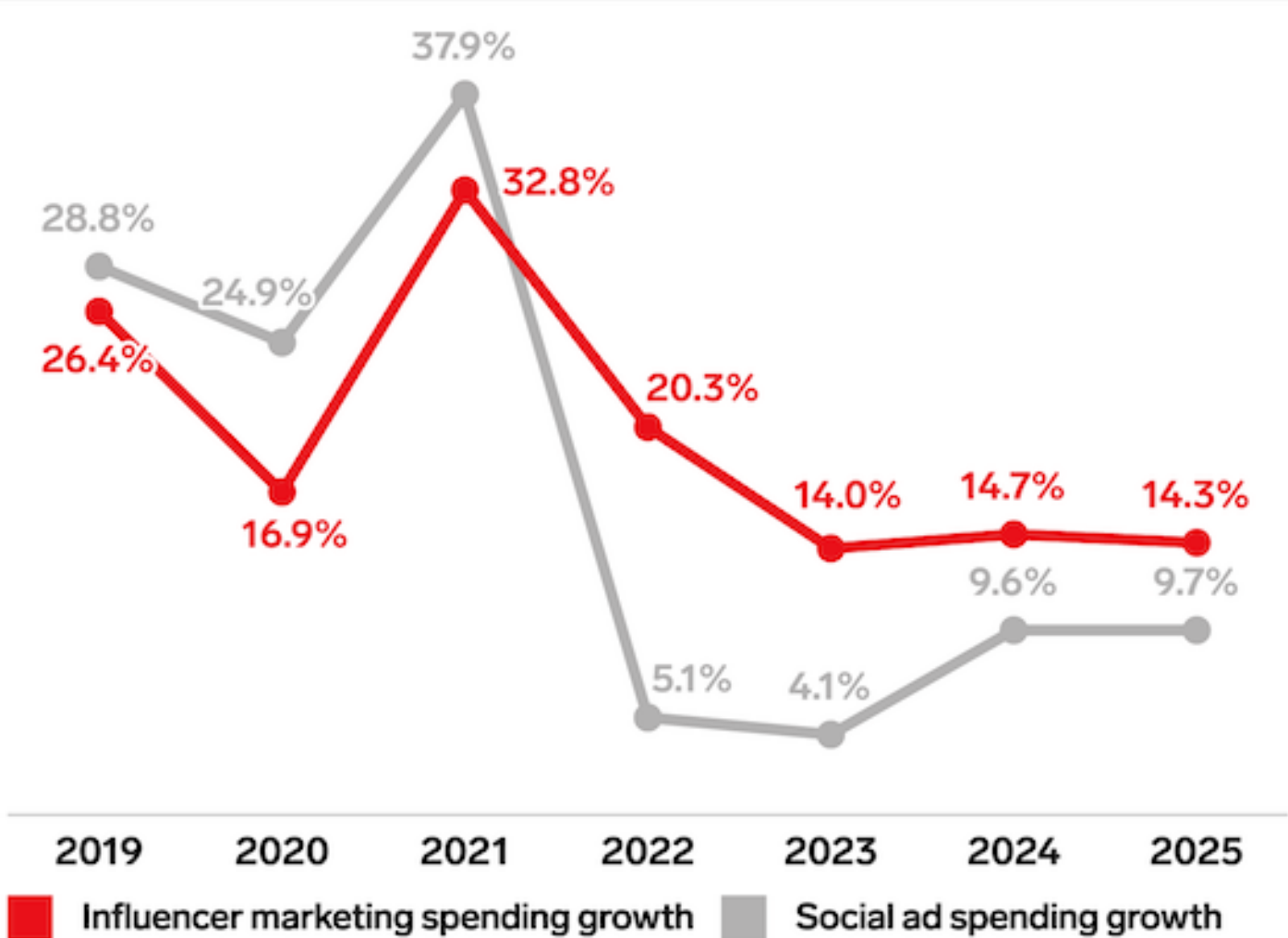
Even as younger users pivot toward TikTok, advertisers are still comfortable on Facebook and Instagram. This could be an opportunity for advertisers to branch out and experiment

more with TikTok and YouTube. But it also means Meta is doing something right in terms of user data, ad placements, ease of use, and tracking.

**4. It's all about the influencers**

# Influencer Marketing Has Been More Resilient Than Social Ad Spending

% change



Note: social ad spending growth is the combined figure for US social network ad spending and YouTube gross ad revenues; social network ad spending 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, such as branded content amplified as paid advertising; 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, such as branded content amplified as paid ads; influencer marketing includes payments made to influencers or their representatives to promote products and services primarily on social media and other platforms featuring user-generated content; excludes noncash payments, such as free products or trips, and branded content amplified as paid advertising  
Source: Insider Intelligence | eMarketer, July 2023

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Insider Intelligence | eMarketer

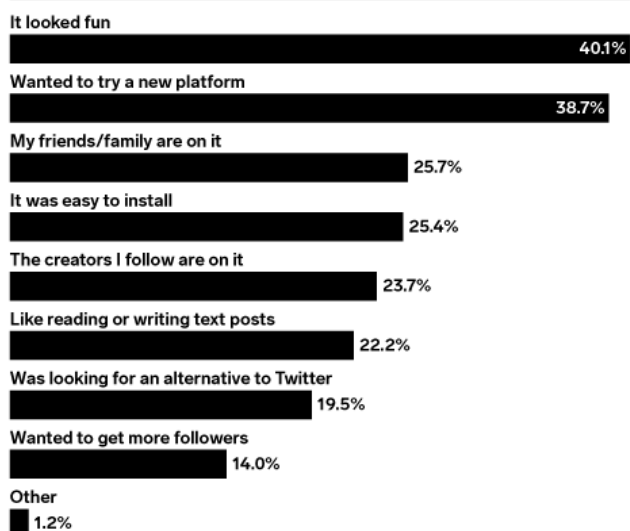
**Social ad spending is still growing in the US**, but not nearly as fast as it was at the height of the pandemic. Instead, influencer marketing is growing at a faster clip, maintaining double-digit growth through 2025 to paid advertising's single digits, according to our forecast.

Influencer marketing has more room for growth, with US spending totaling \$5.14 billion this year compared to US social ad spending's \$68.45 billion.

## 5. Threads unraveled as new text-based platforms fail to take off

### Reasons US Gen Z Downloaded Threads, July 2023

% of respondents



Note: n=401 ages 15-26; among those who have downloaded Threads  
Source: Insider Intelligence | eMarketer, "US Gen Z social media survey 2023," Aug 2023

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Insider Intelligence | eMarketer

Instagram's Threads had immediate adoption, but the X (formerly Twitter) rival's **daily active user count** dropped 82% by the end of its launch month, according to SimilarWeb and Sensor Tower.

Gen Zers we surveyed downloaded the platform because it looked fun and they wanted to try something new, but those interest points have not made a sticky platform. X use is also dropping, according to our forecast.

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