



Social Usage and Ad Spend Snapshot

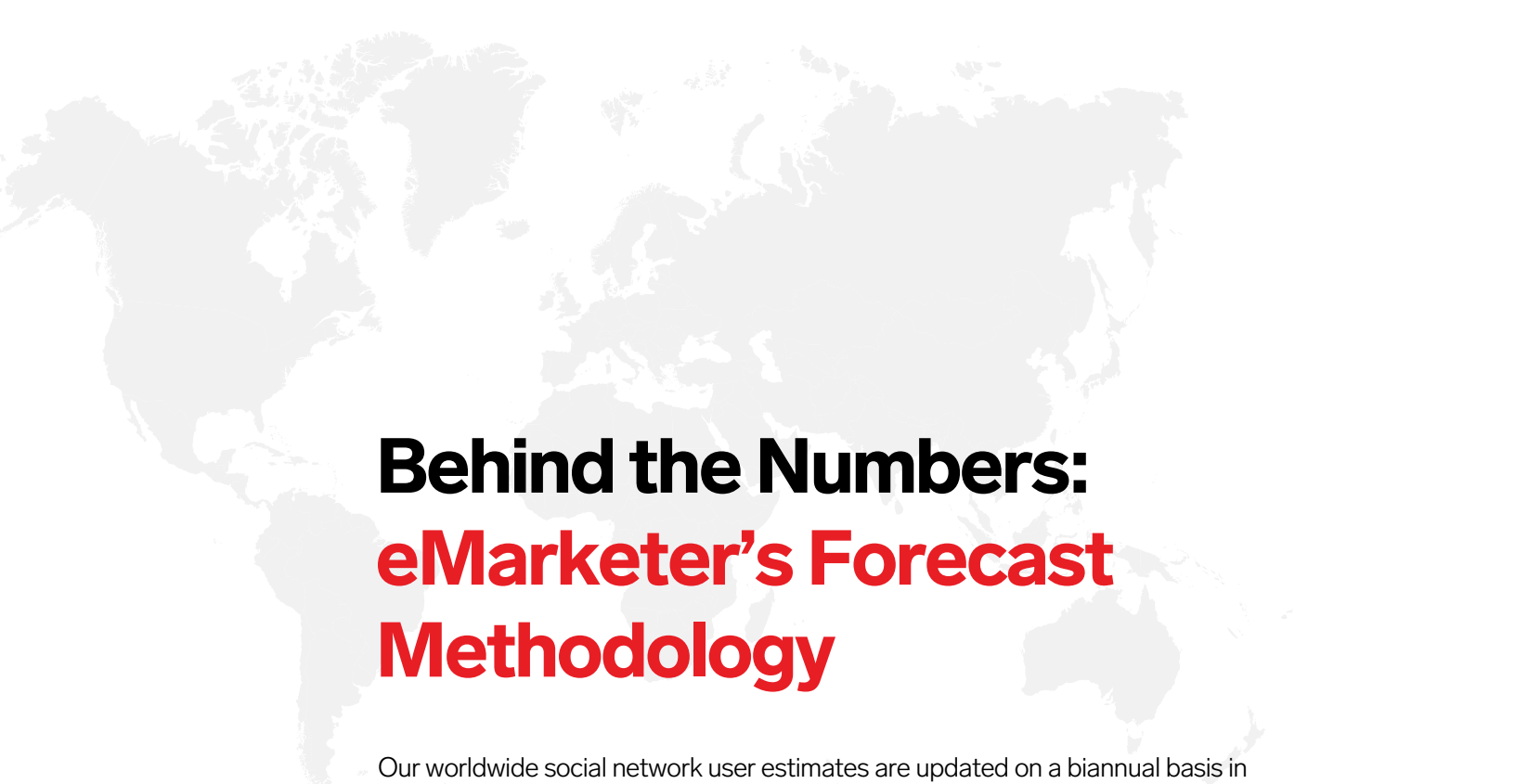
January 2022

Two opposing developments sum up the state of social network usage in 2022: slowing growth after unexpected pandemic gains and the rise of TikTok as a major force in social media. eMarketer has created this infographic Snapshot to help marketers and advertisers understand the social-savvy audiences in the US, UK, and Canada, including breakdowns of usage, time spent, and ad spend by platform.

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Behind the Numbers: eMarketer's Forecast Methodology

Our worldwide social network user estimates are updated on a biannual basis in order to continually incorporate the latest changes and developments in consumers' digital media consumption and technology adoption.

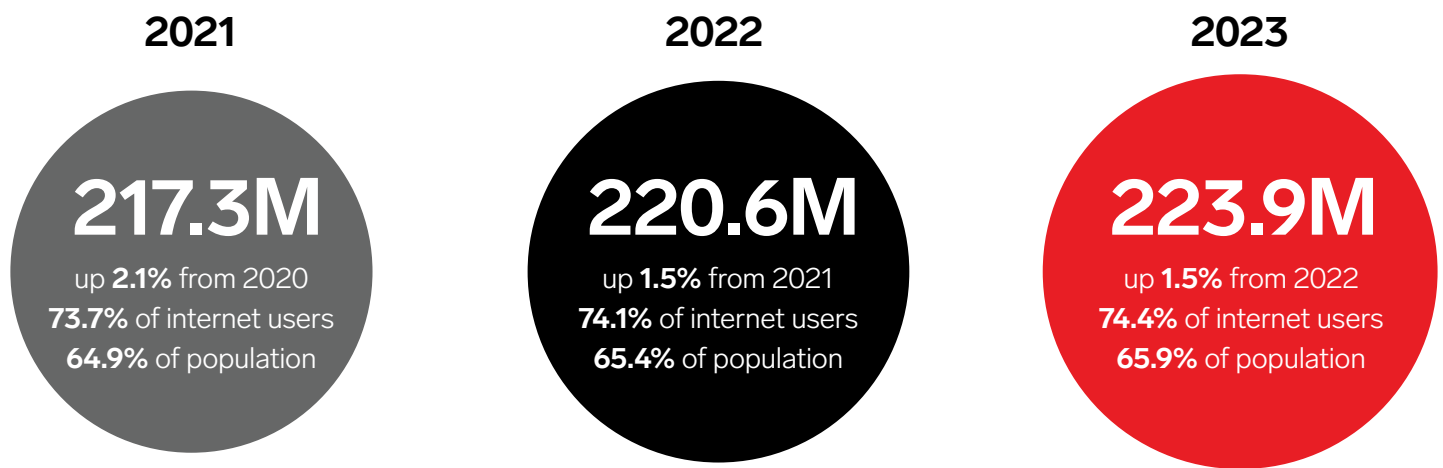
Our forecast is based upon the analysis of 28,314 metrics from 1,053 sources, including figures reported by social networks and research firms, along with demographic-specific and historical trends. We also consider various factors in social network adoption, such as local economic, political, and technological influences that affect consumption, communication, and social behaviors. Any duplicate, fake, or business accounts on social networks are not counted toward user estimates.

Our methodology incorporates ongoing qualitative trends and changes in major company initiatives, partnerships, and innovations to deliver an estimate of how social network adoption is expected to develop. All of our estimates take into account the effects of the coronavirus pandemic.

United States

Social Users

Close to three-quarters of US internet users will be social network users in 2022, and that figure will inch upward throughout our forecast. TikTok will have 90.6 million monthly users in 2022, surpassing Snapchat but significantly behind Instagram and Facebook. After 2020's pandemic-induced bump in social usage, growth in the US social media market will settle back down to a more muted level in 2022. That's to be expected: the market has matured.



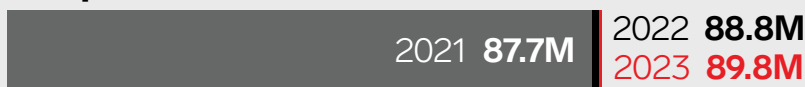
Facebook Users



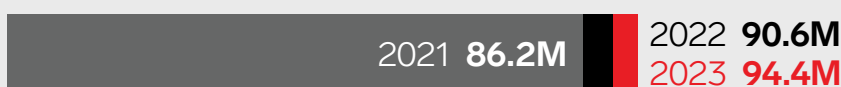
Instagram Users



Snapchat Users



TikTok Users



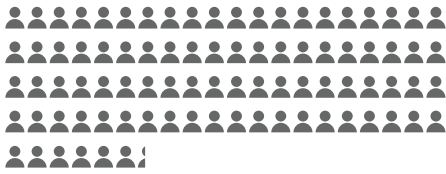
Source: eMarketer, November 2021 (see note page 12)

A Breakdown of US TikTok Users

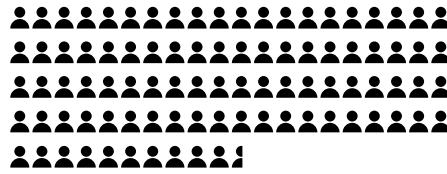
TikTok will continue to woo new users at a rapid rate. US consumers fell hard and fast for TikTok, but it's a relationship that will last. It's now the third-largest social network in the US, and with 94.4 million monthly users by 2023, TikTok should be a mainstay on social media marketing plans.

TikTok Users

2021 **86.2M**



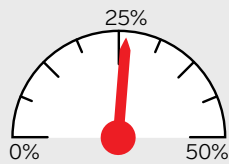
2022 **90.6M**



2023 **94.4M**

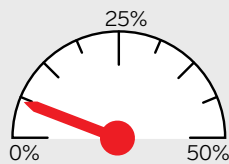


Percent Change



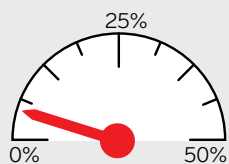
29.5%

2021



5.1%

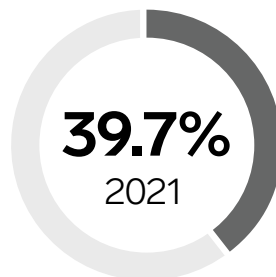
2022



4.2%

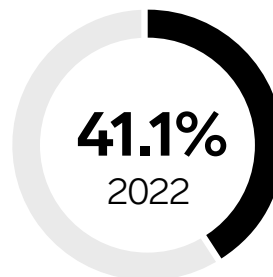
2023

% of Social Network Users



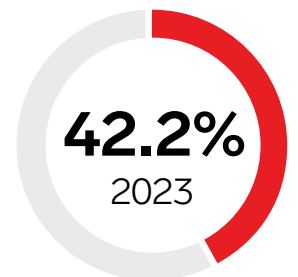
39.7%

2021



41.1%

2022

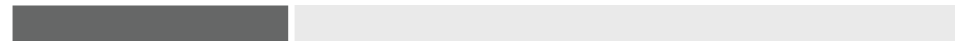


42.2%

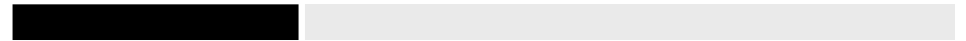
2023

% of Internet Users

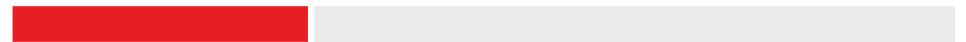
2021 **29.3%**



2022 **30.4%**



2023 **31.4%**



% of Population

2021
25.7%



2022
26.9%



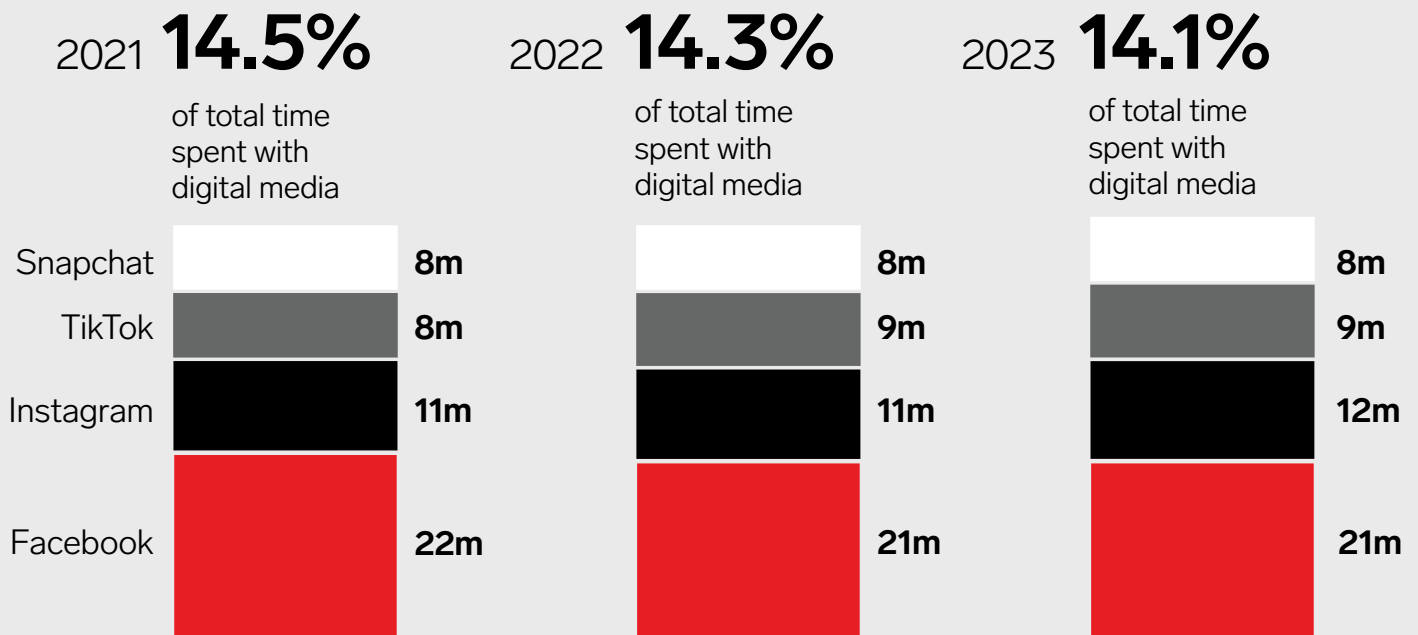
2023
27.8%



Source: eMarketer, November 2021 (see note page 12)

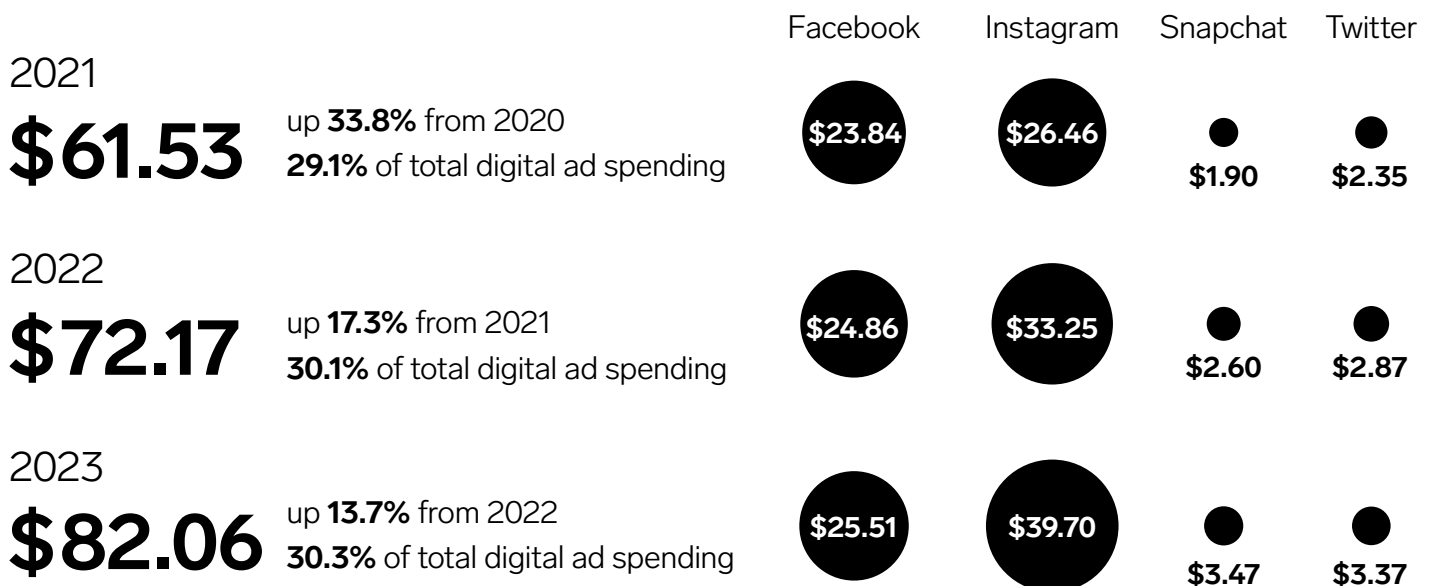
Following an engagement boost on social platforms during the pandemic, time spent will normalize in the US this year as people gradually resume in-person socializing. Americans spent 70 minutes per day social networking in 2021, and will continue to do so this year and into 2023. Ad spending also spiked in 2021 in the US and will continue to rise, highlighting the scale, strength, and resiliency of platforms like Facebook, Snapchat, Twitter, and TikTok.

US Time Spent with Social Networks



Source: eMarketer, April 2021 (see note page 12)

US Social Network Ad Spending (billions)



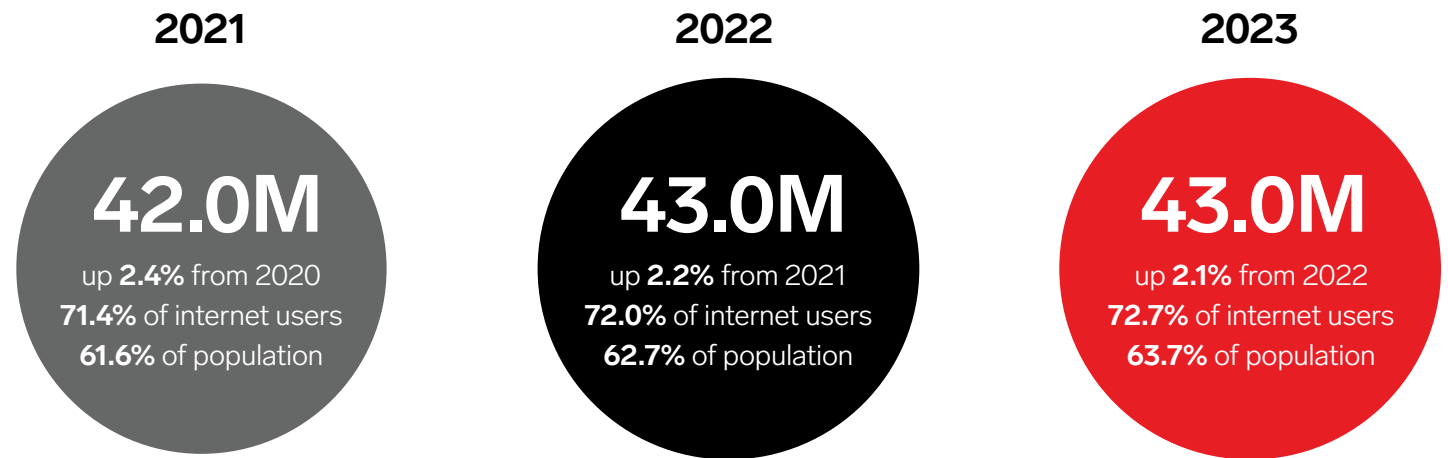
Source: eMarketer, October 2021 (see note page 12)



United Kingdom

Social Users

The UK is a mature market for social network usage, so future growth will be limited. However, patterns of change will differ across age groups, with the youngest users representing the biggest engine of growth. Facebook remains the most popular social network in the UK, but it's losing share of users, falling from 81.1% to 80.1% this year. TikTok, meanwhile, will shoot up the rankings to become the third-biggest platform by 2023.



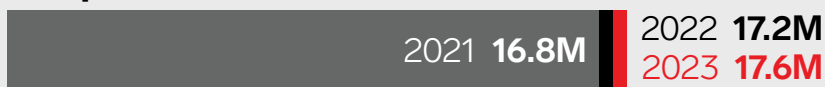
Facebook Users



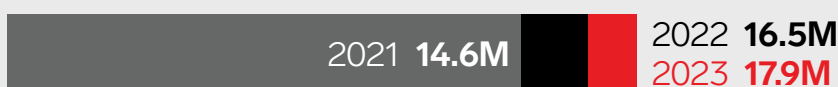
Instagram Users



Snapchat Users



TikTok Users



Source: eMarketer, November 2021 (see note page 12)

A Breakdown of UK TikTok Users

TikTok users in the UK will reach 16.5 million in 2022, up 12.9% year over year. This level of growth is down from the massive pandemic-induced 124.7% rise in 2020, but that was from a small base. A young and engaged user base is contributing most to impressive double-digit growth this year, but the platform's appeal reaches beyond just teens.

TikTok Users

2021 **14.6M**



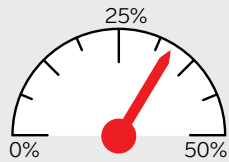
2022 **16.5M**



2023 **17.9M**

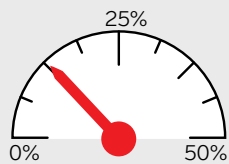


Percent Change



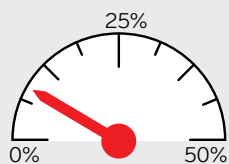
33.5%

2021



12.9%

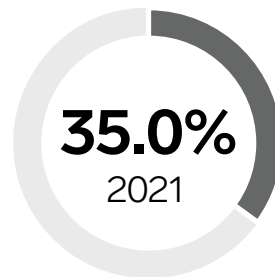
2022



8.4%

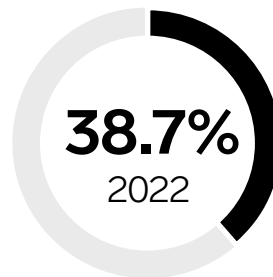
2023

% of Social Network Users



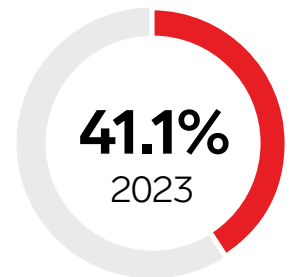
35.0%

2021



38.7%

2022

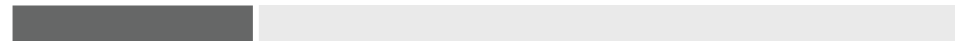


41.1%

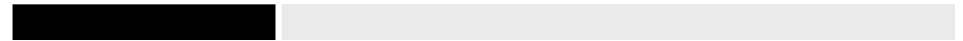
2023

% of Internet Users

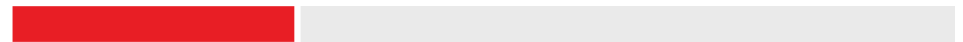
2021 **25.0%**



2022 **27.9%**



2023 **29.9%**



% of Population

2021
21.6%



2022
24.3%



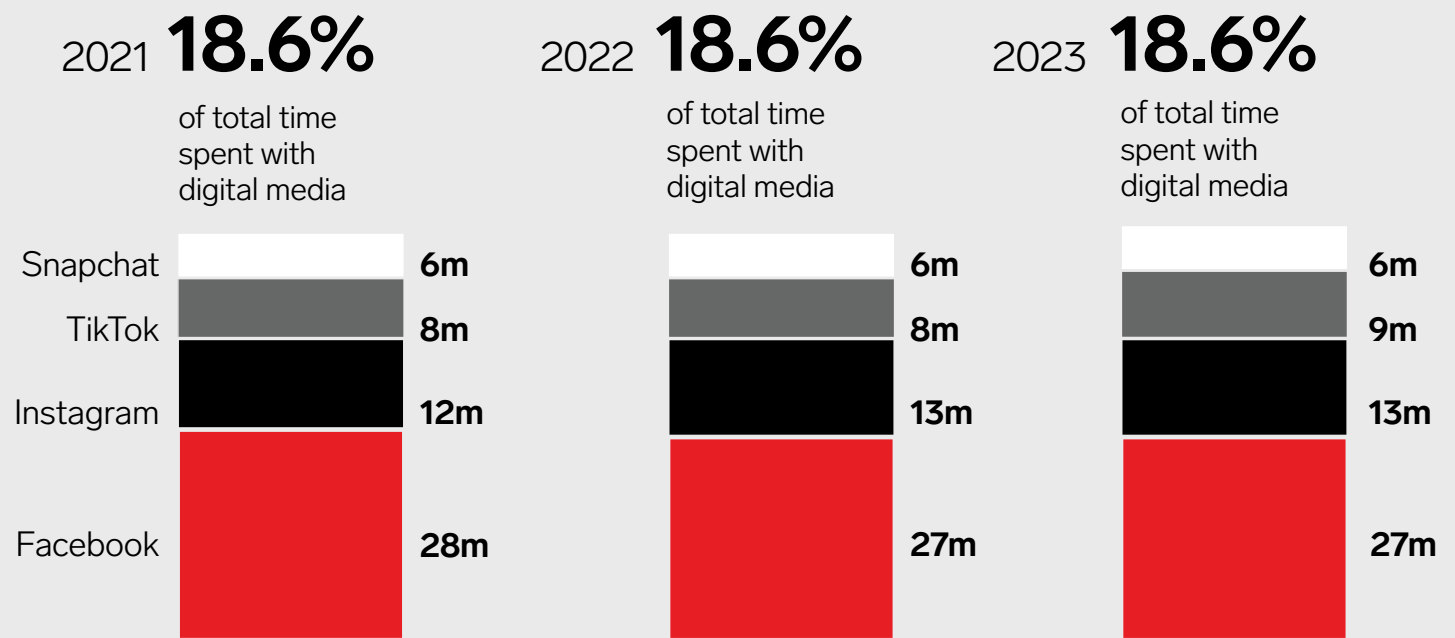
2023
26.2%



Source: eMarketer, November 2021 (see note page 12)

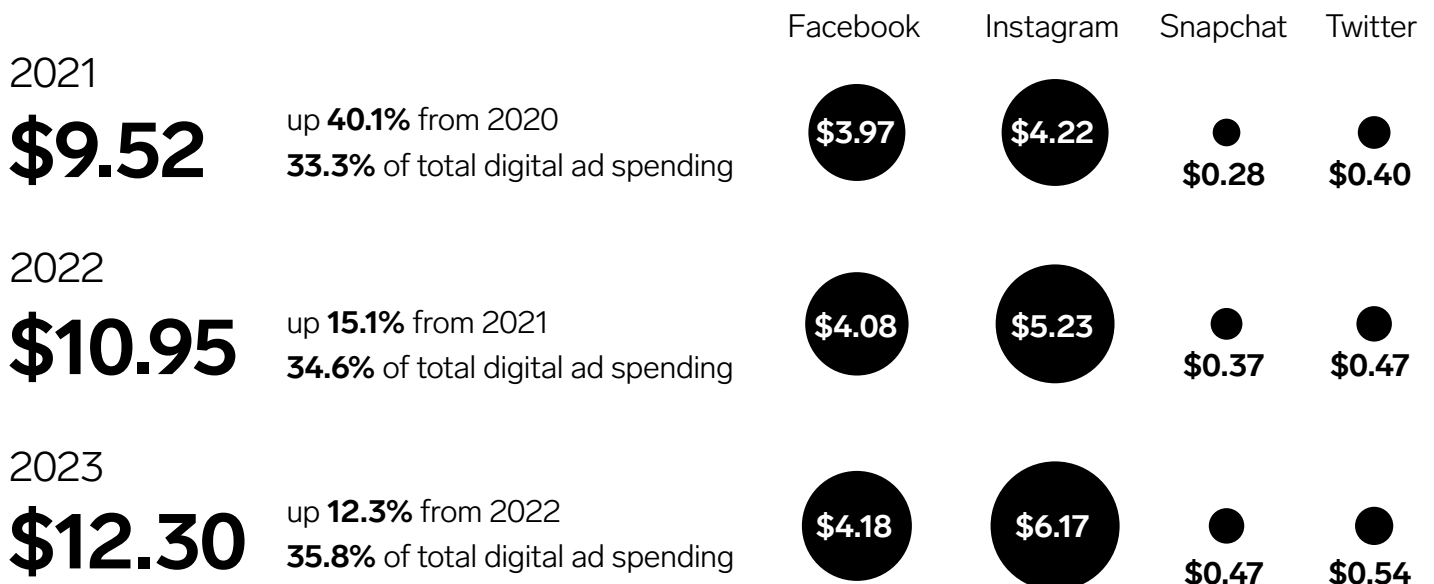
Like the US, social media time spiked in 2020, and the habit will stick. Rather than reverting to pre-pandemic levels, time spent will maintain its elevated trajectory. UK social network users spent 65 minutes per day networking in 2021 and 2022. Next year, it will gain one more minute. Ad spending on social continues to increase. We forecast it to hit nearly \$11 billion this year. However, growth is slowing, largely due to the engagement surge during the pandemic and market maturity.

UK Time Spent with Social Networks



Source: eMarketer, April 2021 (see note page 12)

UK Social Network Ad Spending (billions)



Source: eMarketer, October 2021 (see note page 12)



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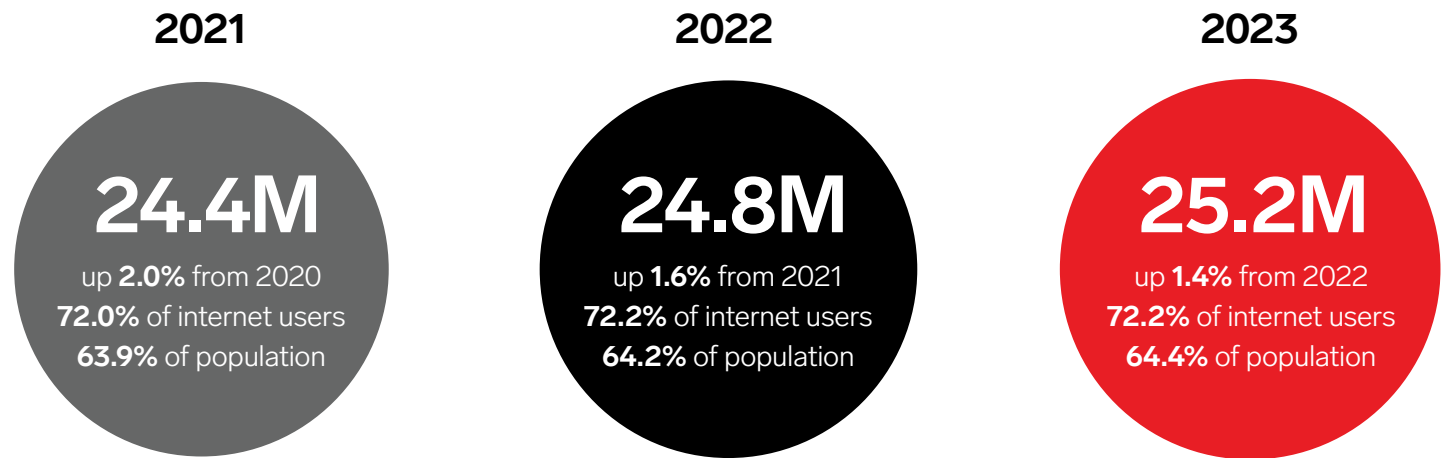
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ADVERTISING, VIDEO ADVERTISING
AND CREATIVE MANAGEMENT REPORTING

Social Users

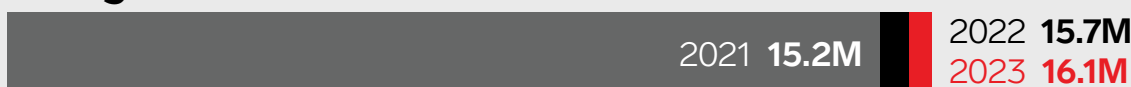
Social network usage in Canada has reached unexpected levels. We adjusted our forecasts upward following a pandemic bump, and its incremental lift will persist through 2023. Older users are driving this change. There's also a greater variety of platforms, as Facebook dominance wanes, and heavier usage on emergent platforms, like TikTok, driven by younger users.



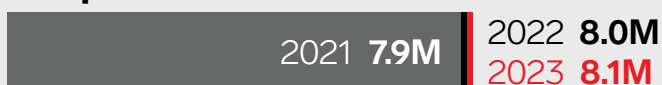
Facebook Users



Instagram Users



Snapchat Users



TikTok Users



Source: eMarketer, November 2021 (see note page 12)

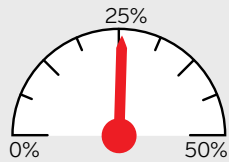
A Breakdown of Canada TikTok Users

TikTok usage in Canada will rise 8.0% this year, unmatched by any other platform—Instagram’s 3.4% growth is closest. This is following the platform’s huge spike in 2020 as well as strong growth last year. However, compared with the US, TikTok penetration in Canada lags: 21.0% of internet users there are on the platform, compared with 30.4% in the US. Users in Canada pay higher costs for mobile data, likely suppressing TikTok adoption.

TikTok Users

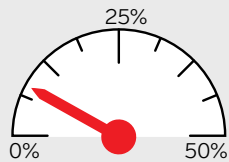


Percent Change



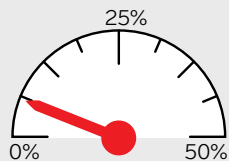
25.3%

2021



8.0%

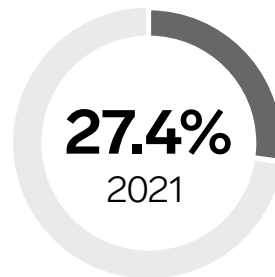
2022



6.1%

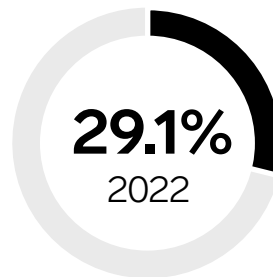
2023

% of Social Network Users



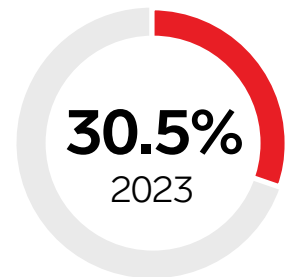
27.4%

2021



29.1%

2022



30.5%

2023

% of Internet Users

2021 **19.7%**

2022 **21.0%**

2023 **22.0%**

% of Population

2021 **17.5%**

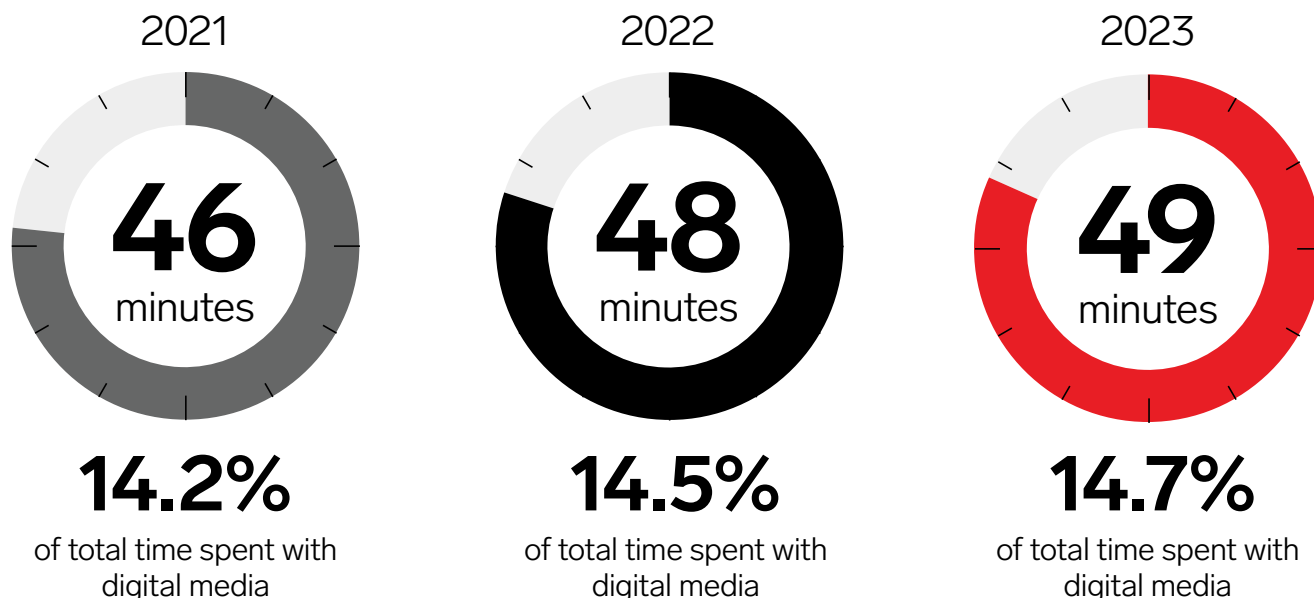
2022 **18.7%**

2023 **19.6%**

Source: eMarketer, November 2021 (see note page 12)

Although Canadians are not spending as much time social networking as those in the US and the UK, their time spent is increasing at a faster rate. Users in Canada spent 46 minutes per day social networking in 2021, and we forecast that to extend to 49 minutes by 2023. At this time, we don't forecast time spent by platform or ad spending for social networks in Canada.

Canada Time Spent with Social Networks



Source: eMarketer, April 2021 (see note below)

End Notes

We chose not to feature Twitter usage across the US, UK, and Canada because we see limited growth or declines this year and beyond, and it remains far below Snapchat and TikTok. At this time, we don't forecast TikTok ad revenue because there's no sufficient information to estimate with the level of reliability we require.

Page 3

US Social: internet users of any age who use a social network via any device at least once per month

Page 4

US TikTok: internet users who access their TikTok account via any device at least once per month

Page 5

US Time Spent: ages 18+; includes all time spent with social networks, regardless of multitasking; includes usage via desktop/laptop computers and mobile (smartphones and tablets)

US Ad Spend: includes paid advertising appearing within social networks, social network games and social network applications; excludes spending by marketers that goes toward developing or maintaining a social network presence

Page 6

UK Social: internet users of any age who use a social network via any device at least once per month

Page 7

UK TikTok: internet users who access their TikTok account via any device at least once per month

Page 8

UK Time Spent: ages 18+; includes all time spent with social networks via desktop/laptop and mobile, regardless of multitasking

UK Ad Spend: All years converted to US dollars using average 2020 exchange rates;

includes display, search, video and other forms of paid advertising appearing within social networks, social games and social apps; excludes spending by marketers that goes toward developing or maintaining a social network presence

Page 10

Canada Social: internet users of any age who use a social network via any device at least once per month

Page 11

Canada TikTok: internet users who access their TikTok account via any device at least once per month

Page 12

Canada Time Spent: ages 18+; includes all time spent with social networks via desktop/laptop and mobile, regardless of multitasking

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