

# The Daily: What people do on social media, TikTok goes traditional, and getting paid to watch social ads

Audio



On today's podcast episode, we discuss how advertisers should adjust their plans based on social video time's slowing growth, whether people will spend more social media time on connected TVs, and the ratio between ad spend and time spent on social networks. "In Other News," we talk about whether TikTok can become a more traditional social network and getting paid to watch ads on a new socially conscious social media app. Tune in to the discussion with our analyst Debra Aho Williamson.

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## Episode Transcript:

Marcus Johnson:

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Debra Aho Williamson:

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Marcus Johnson:

Hey, gang, it's Thursday, September 14th. Debbie and listeners, welcome to the Behind the Numbers: an eMarketer Podcast. Made possible by a win. I'm Marcus. Today I'm joined by one of our principal analysts covering everything social media based out of Seattle. It's Debra Aho Williamson.

Debra Aho Williamson:

Hey Marcus.

Marcus Johnson:

Hey, Debbie. Today's fact is very Seattle related.

Debra Aho Williamson:

I love it.

Marcus Johnson:

You are based out there, and so-

Debra Aho Williamson:

I love it. One time I was on, you asked me about wine regions and I was like, yes, I know the answer to this one, because it was Washington State. So yeah, bring it on. More Seattle.

Marcus Johnson:

Yeah. So this one, do you know roughly how old Pike Place Market is? Any guesses?

Debra Aho Williamson:

120 years.

Marcus Johnson:

Oh my God, that's almost exactly right. Yeah, pretty much.

Debra Aho Williamson:

I'm just a fountain of Seattle and Washington State facts, Marcus. Come on.

Marcus Johnson:

That is remarkable. 116 years old. Yeah, geez. This opened in 1907 and Pike Place Market in Seattle, one of the oldest continuously operating farmer's markets in the country. Here's another fact about it. So the market was established as the result of public outcry over high food prices. And so to cut out wholesalers who up charged for goods, the Seattle City Council proposed the creation of a market where residents buy directly from farmers and past ordinance 16636, establishing a public farmer's market on the west side of Pike Place. So that's how it got started.

Debra Aho Williamson:

It is fascinating. The main level of the market is teeming with, I would say mostly tourists these days. But if you go downstairs to the lower levels where these little shops have been there for years, decades, it's just a war of amazing crazy little weird shops. So I encourage anybody, so this is okay. If I was a tour guide, I would say check out the fish throwers, check out the fruit stands, the flower stands, everything on the upstairs. And then when you're done with that, oh, and have some great food at some of the vendors. But then go downstairs and check out the weird little shops that are below level because that's where the true gritty kind of history of the market I think really resides.

Marcus Johnson:

Very nice. Great tip. I've been before. But when I come back, I'm definitely heading downstairs this time. Anyway, today's real topic, what people do on social media.

So in today's episode, first, in the lead, we'll cover what folks are up to on social media apps. Then for another news, we'll discuss whether TikTok can become a real social network, quote, unquote, and whether socially conscious social media apps are the future.

We start, of course, with the lead. Debbie, we're talking about what folks get up to on social media platforms. US adults will spend 11% of their total daily media time, put another way, 18% of digital media time, 10% of total, 18% of just the digital portion with social platforms this year. That's an hour and 47 minutes a day, but it's only two minutes more than last year. So that slowed down, the amount of total time that we spend on social did get a big bump from the pandemic. That's how long people are spending on social platforms, but what are they doing on them? The short answer, Debbie, it seems is video. Video share of average daily time with social networks has gone from 33% to 56% in the last four years. However, that share is flattening out and will only get to 60%, from today's 56, will only get to 60% in two years. And an important question, Debbie, that you ask in some new research on this very topic where people spend their social time is should advertisers adjust their plans because of slowing growth in social video time?

Debra Aho Williamson:

It's a really dynamic question, and honestly, a dynamic situation. I caught where you said only 60% of social time will be on video. So that's a massive amount of time. So let's just lay that out there right now and say, okay, yes, video is the most popular activity, especially for young people, but probably for other generations as well, right now on social media. And we're going to see that continue. We're not seeing time spent with social video declining. But what we're seeing is that massive growth that you spoke of that was pandemic driven and TikTok driven is starting to slow down. And what that means, I think for advertisers is a couple of things. First of all, it's okay to continue to invest in social video advertising. We just said, 60% of time spent is with social video. So if you're not investing in social video advertising right now, you're missing out on reaching those people.

However, this is not necessarily the time to over index on social video ads because the important thing for advertisers is to maintain a balance. You have to continue to reach people in their feeds, in stories, and shopping, and search. Search advertising is becoming more of a thing. So it's really about having a very well-rounded portfolio of social ads, not only video ads, but also image ads, commerce ads, search ads. Those are all the things that add up to reaching the social media consumer wherever they're spending their time. And that could be on social video, but it could be in their stories or in their feed as well.

Marcus Johnson:

Yeah. Another interesting stat that jumped out about the time spent watching video on social platforms is of all the time people spend watching digital video of all of it, your digital video watching time, 23% is spent on social networks, and that's flat. That share is flat. So people spending about a quarter of their digital video time watching it on social networks, not really going anywhere in the future. However, social video time overall is creeping up. And if you look at the minutes, nearly 50 minutes a day today, and it's going to be 53-ish a day next year. So those minutes are ticking up somewhat.

But Debbie, part of that reason is because people are watching digital video other places and not just on their phones anymore, which is predominantly where a lot of the social media time has been consumed. One such platform, YouTube, have said they're indicative of this migration. They've said before that around half of YouTube viewership is now on CTV, it's now YouTube, we count as social media, not social networks. But still within the same universe as a Facebook and Instagram or TikTok. And so with YouTube saying that around half of its viewership is on CTVs, we start seeing people spend more of their social media time, apps like TikTok, Instagram on CTVs as opposed to on smartphones.

Debra Aho Williamson:

That is a super interesting question. And again, it is a dynamic situation. I think one of the things, and you called out YouTube, which is what I would've called out as well. According to our forecast for the first time, users will spend more time watching YouTube on CTVs than on mobile devices this year. And that is of course, all forms of YouTube programming, not just the Shorts which are competitive with TikTok, but long form videos as well. So YouTube really stands to benefit when we talk about social media time on CTVs, because YouTube kind of falls into this nice little niche where it's very much digital video, but it also has social media characteristics as well. So I would definitely look to more time spent on YouTube on CTVs. YouTube's also trying to put more Shorts on connected TV and enable people to call up the YouTube app and just watch a series of Shorts. And so I think that's going to drive time as well.

TikTok does have its app available on CTVs and on certain other streaming platforms like Roku. But honestly, I don't think we're seeing a whole lot of people right now flipping on their TV and watching their TikTok videos. It really is still primarily a mobile activity and something that I think people are going to be doing on their phones. One thing I will say about TikTok that is a little bit more interesting though, is that they are starting to go into more out of home scenarios. So I know this question wasn't about out of home, but I did want to mention that

for example, TikTok has just struck a relationship with Redbox, the old-fashioned kiosks, where you could see TikTok videos at your Redbox, and there's other places where TikTok videos might be shown, like offices or elevators.

So overall, I think the opportunity for watching social video outside of your mobile phone is somewhat interesting, but when we look at the amount of time, we estimate that less than 1%, 0.8% of US daily social time will be spent with CTV apps this year, despite everything I've just told you about what TikTok and other social networks are doing to invest in the channel. And we estimate that mobile will be about 89% of daily social time. So not a lot going on yet, but certainly there's promise.

Marcus Johnson:

Yeah. Sticking with TikTok for a second, you point out one pretty significant milestone in your report. But there's also a trend in your report, which I think is equally as important. So I'm wondering to you, which one of these is most important, is most significant, and also why? So one of them is the fact that TikTok will overtake Facebook by 2025, in terms of total daily minutes. TikTok overtaking Facebook by 2025 in terms of total daily minutes. Is that more significant or is the fact that users spend nearly twice as long on TikTok per day as they do on Facebook, twice as long on TikTok per day, nearly as they do on Facebook? Both of these according to our forecasts.

Debra Aho Williamson:

So yeah, these are really two ways of looking at the same data. And honestly, both are amazing and absolutely shocking stats. But to break it down, the amount of total daily minutes spent on TikTok can be calculated in years, and it adds up to more than 8,000 years per day of time. So just take that in for a second.

Marcus Johnson:

TikTok didn't exist before the pandemic, pretty much.

Debra Aho Williamson:

Absolutely nuts. Yeah. That's absolutely nuts. And what that statistic does is it takes into account both the number of users on a platform as well as the amount of minutes each of those users are spending on the platform. And right now, Facebook has more total minutes because of its sheer size, it has more users. But even with that sheer size, it's not going to be



able to sustain that lead because the amount of time that's users are spending is just going to keep adding up. And so that's why the other figure is also equally important, because that's average daily minutes.

It's what one single user spends on average per day on TikTok. If you were to ask me to tell you, okay, so as an advertiser or marketer, which statistics should I pay attention to? I think it's probably the average daily minutes statistic because it's really, I mean, it's more meaningful. I could tell you it adds up to 8,000 years of total minutes and you go, wow, that's amazing. But if I tell you each user spends an average of 54 minutes per day on TikTok, that's a tangible statistic that you could take away and go, okay, that is regular daily engagement with TikTok, and I need to make sure as an advertiser that I maximize those minutes and reach people as best as I can, while they're actively engaging with TikTok.

Marcus Johnson:

Yeah, yeah. As we mentioned, a number that's nearly twice as big as Facebook's time spent per day on Facebook, just around half an hour. Debbie, final question here. I recently spoke to our principal forecasting writer, Ethan Cramer-Flood, about imbalances between how much time we spend on different media channels and how many ad dollars are spent there. And so 26% of all digital ad dollars, 26% of that digital ad pie are spent with social networks or on social networks, whereas a smaller 18% of all digital time is spent on social networks. So 18% of digital time on social and 26% are bigger, 26% of digital ad dollars on social networks network. Are advertisers overspending on social media because the ad spend outweighs the time spent on the channel?

Debra Aho Williamson:

I have to say, first of all, Ethan's analysis was such an interesting piece of research. I got a chance to read it before he published it, and super fascinating because we've never really done this before, compare time spent to ad spending and look at where those imbalances are. And honestly, I think when you look at the imbalance in ad spend to time spent, most of the conversation is centered on Meta. Meta takes the lion's share of social ad dollars. But it's platforms, to your point just a minute ago, are used, about half the amount of daily minutes are spent on platforms, Facebook and Instagram compared to TikTok. But I really think what Meta has going for it and continues to have going for it, even though people spend more time on a platform like TikTok, is its operational prowess, its ability to build ad products, to keep marketers engaged in the platform.

Meta went through a really rough period over the past couple of years where it lost a lot of its targeting effectiveness as a result of Apple's privacy changes. And it's still not out of the woods. In Europe it's facing also additional new privacy related challenges to its business. It's even exploring a potential subscription service from what I've seen. But advertisers are just wedded to Meta. They're used to it, they know its tools, it's embedded in their systems. It's very hard to unseat that. So I think from the perspective of an advertiser wanting to have a regular reliable partner that it advertises on, Meta is still going to get that lion's share of dollars as it should. Platforms like TikTok are doing better. They're definitely heading in the right direction, but it's got a long way to go and grow to catch up to Meta.

Marcus Johnson:

Everything. That's all we've got time for the lead. Time for the halftime report. So Debbie, if you could remind listeners of one thing they should remember based on our conversation in the first half on time spent on social media.

Debra Aho Williamson:

So growth in time spent with social video is starting to plateau, but social video still accounts for 60% of daily social network time, and it's an absolutely critical place for advertisers to be, and they should continue to spend on social video advertising.

Marcus Johnson:

Well, Debbie's full report is called *US Time Spent With Social Media 2023*. Video is still a dominant activity, but it's booming. Growth is slowing. Time now for the second half of the show today. In other news, TikTok wants to be a real social network and getting paid to watch ads on a hate free social app.

Story one. TikTok wants to be a quote, unquote, real social network. Sara Fischer of Axios notes that the short video giant is now hiring for roles that include building more social networking and private messaging features. She explains that inside TikTok, there's concern users are sharing TikTok videos on other social media and messaging apps when they want to discuss them with friends. Since TikTok focuses on engagement between creators and fans, not real life connections among users. But Debbie, the most interesting sentence in this article on TikTok wanting to be a real social network is what and why?

Debra Aho Williamson:

Sure. So the sentence I picked is, "Investing in more social functions wouldn't necessarily diminish TOS central role as a distributor of viral video, but it does highlight the limits of building a platform without any sort of social graph, especially as rivals move in." So the reason I picked this sentence is because as you point out, TikTok grew massively as a platform based on being an entertainment vehicle, something that people use to watch and follow people they didn't know. And that was very different from the other existing social platforms that were built, for example, like Facebook built on that social graph of your relationships with other people. But I think over time what we're seeing is for Facebook for example, they've realized that there is a limit to that social graph. So they're starting to show you content from accounts you don't follow, kind of like the TikTok model.

But TikTok is going the other way. It's also realizing that, perhaps there is an upper limit to the amount of time people want to spend watching videos from people they don't know and that they have an opportunity to capitalize and build out more social connections between people. And messaging, for example, is one thing that they've been exploring. And messaging, we know, has been a core feature of Instagram for several years, and certainly of Snapchat as well. So TikTok just really, I think wants to recognize that even as addictive as its videos are, engaging with friends is also still a key reason why people use social media. And TikTok wants to make sure it offers something for those people.

Marcus Johnson:

Yeah. TikTok saying they're looking to build out private messaging features. Our Jeremy Goldman was noting that TikTok will need to prove those messages can be kept private considering the US government's concerns with TikTok's connections to China. And Debbie, I thought it was also interesting to see that the company, TikTok, sees themselves according to one of their spokespeople as an entertainment channel, which I thought was interesting. Talk about this evolution of social networking, social media to social audio for five seconds and then social entertainments. And it seems like that is where TikTok is happy to place themselves.

Story two, getting paid to watch ads on a hate free social app. Trishla Ostwal of Adweek writes that mobile app, WeAre8, now in the US, aims to offer a social media alternative to hate speech and misinformation. Folks opt in and then get paid to watch ads. That money can then be withdrawn or directed to charitable causes like Feeding America, Save the Children and water.org. She explains, WeAre8 makes money from ads, but shares half of it with people

through micropayments, about 5% with charity and climate change solutions, and 5% with its creators and publishers. But Debbie, the most interesting sentence in this article on this new app, WeAre8 is what and why?

Debra Aho Williamson:

Yeah, this was such an interesting one to read about. I mean, very small usage right now. I believe the article said one million users, but they have a goal of 80 million. So they have a long way to go to reach that goal. But the sentence I picked had to do with ad performance, which honestly when I read it, I thought maybe it was a typo. But the sentence is, "Heineken has run three campaigns on WeAre8 and saw a 24% average C T R, click-through rate, on the app.

And I read that and I went, "Did they mean 2.4%?" Because I went and looked in our industry KPIs database, which is available to subscribers of Insider Intelligence and one source, Sky, according to Sky, worldwide average social click-through rate was just 1.4% in Q2 2023. Another source in our database amplify the worldwide median, so this was median but not average, monthly click-through rate for social ads specifically from the alcohol industry, so this is more specific to Heineken, was just 0.44% in Q1 of this year. I look at this statistic of 24% click-through rate and I go, "Wow." Maybe there's something here. But it's also, again, people are being paid to watch the ads. Perhaps there's something going on there. But either way for an advertiser to see a click-through rate that huge, that certainly was eyeopening for me.

Marcus Johnson:

Yeah. There's a few numbers that jumped out to me in this, so that was definitely one of them. Also, some really cool numbers. WeAre8, they said that nine in 10 people opt in for the ads, and according to the company, eight in 10 could recall an ad after seeing it on the platform. So this idea of being paid to engage with ads or to watch ads seems to be changing up the level of engagement with them.

You mentioned they're only on one million users, they're looking for 80. They've got a pretty long way to go, to put it mildly. But I was thinking this could resonate with young folks, this idea of this kind of hate free social app, something that's a bit more socially conscious. Because young people do care about sustainability and the climate as well. Two numbers to back that up, climate change was the second leading personal concern of Gen Z adults

worldwide last year behind only cost of living, according to Deloitte. And number two, when it comes to the values Gen Z want from a company where they shop, climate change is second behind only mental health, according to the ICSC and Big Village. So maybe there's something to this. .

Debra Aho Williamson:

And honestly, young people care about making a little bit of pocket money too.

Marcus Johnson:

That's it. They don't hate the side hustle.

Debra Aho Williamson:

I feel it's an interesting sweet spot there.

Marcus Johnson:

Yeah. We'll see. That's all we've got time for this episode. Thank you so much, Debbie, for hanging out today.

Debra Aho Williamson:

Thank you, Marcus.

Marcus Johnson:

Yes, indeed. And of course, thank you to Victoria who edits the show, James, you copy edits it, and Stuart who runs the team. Thanks to everyone for listening in. We'll see you tomorrow, hopefully for the Behind the Numbers Weekly Listen. That's an eMarketer podcast made possible by Awin.