US

Social

Behind the screens

GWI.

2023 trends report

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Methodology & definitions

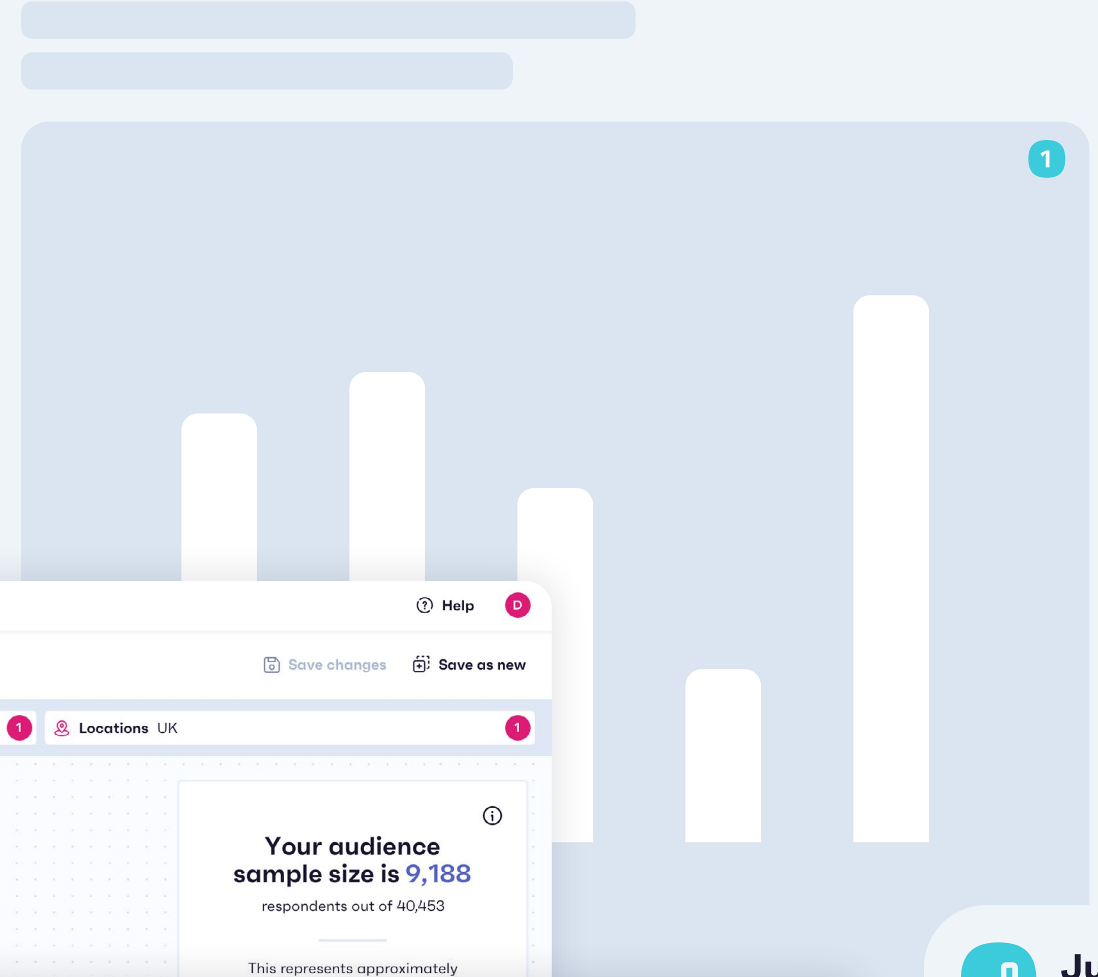
All figures in this report are drawn from GWI's online research among internet users aged 16-64 or 16+. Our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia-Pacific region, low internet penetration rates can mean that online populations are more young, urban, affluent, and educated than the total population.

When reading this report, please note that we use a mixture of data from our ongoing global quarterly research, GWI Core, as well as GWI USA, GWI USA Plus, and GWI Zeitgeist.

GWI USA is a quarterly online study among internet users aged 16+ in the US, representing Americans across all 50 states. GWI Zeitgeist is a monthly recontact study of Core that we carry out in 12 markets. Each year, GWI interviews over 950,000 internet users aged 16-64 in 52 countries via an online questionnaire for our Core data set. 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.

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.



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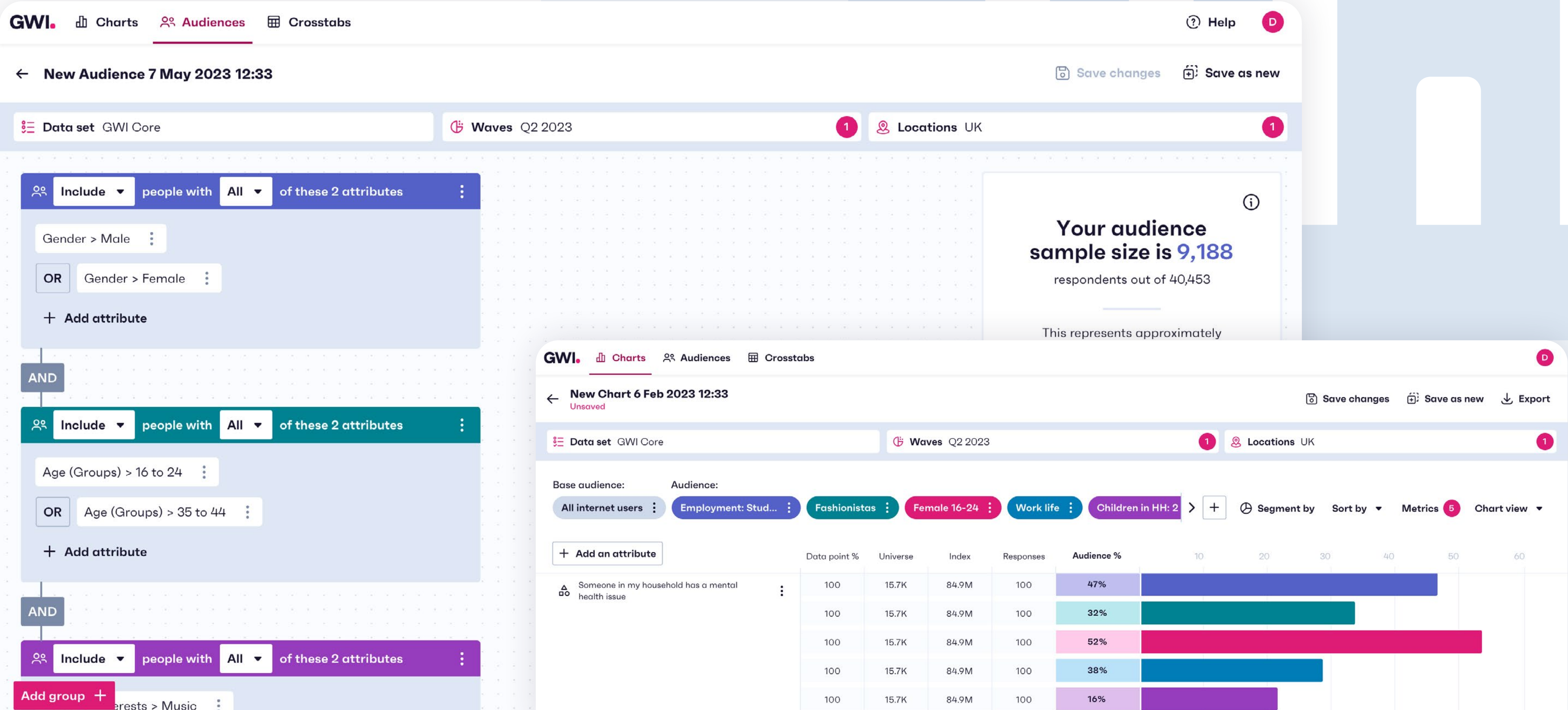
Each of the graphs is numbered

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 media patterns are evolving

While Americans spend less time on social media compared to the global average, time spent online in the US has remained steady since 2020. While this continued trend suggests that the pandemic's impact on social media usage hasn't dropped desires to spend time online, future intentions may change. 31% of Americans say they try to limit their time on social media, a 9% increase since Q2 2020. This information is crucial for understanding the changing habits of social media users and nods to how brands can adjust their marketing strategies accordingly.

Generational dynamics

Gen Z spends the most time on social media but are wary of its negative impact on mental health. Marketers should tailor messaging to resonate with their desire for authenticity and promote positive engagement. Additionally, the growing presence of older consumers on social media offers opportunities for brands to engage and retain this affluent demographic through customized content and experiences.

Authentic & community-driven platforms are highly favored

Americans seek out authentic, community-driven platforms that reflect real-life experiences rather than posts of perfection. Understanding these preferences allows marketers to tap into micro-communities and create personalized messaging that resonates with highly targeted audiences. Platforms like BeReal, Reddit, and Tumblr have gained popularity in the US due to their focus on these key traits.

Social platforms are integrating videos into their feed

The rise of TikTok demonstrates the importance of incorporating video content into social media strategies. Video-centric platforms continue to engage users and offer opportunities for effective advertising. Integrating old and new technologies is crucial, as consumers often use multiple platforms. Brands should consider leveraging both established and emerging platforms to reach their target audience effectively.

Consumers want social commerce to feel organic

Consumers are taking charge of their shopping experience, favoring user-controlled discovery over the passive consumption of ads. Young consumers are driving this. Social media is the number one way Gen Z finds new products and information, influencing the way we search for brands in the future.

01

Social media in the US

Social rankings of the US vs. other markets

On average, compared to the rest of the world American consumers spend less time on social media. Looking at the US specifically, since 2020 time online has slightly grown overall compared to other world regions. Since Q1 2022, the daily average of social media time has increased by 4 minutes in the US indicating a steady hold from the pandemic. Time spent on social media hasn't dropped in America just yet, but it hasn't grown significantly either.

As 31% of Americans say they try to limit their time on social media, a 9% increase since Q2 2020, future intentions may change to align with global time spent online.

Time limits to social media may also explain why American consumers are less likely to be heavy social media users. US consumers are only slightly above Europeans, with 16% of US consumers using social media more than 4 hours a day, compared to 13% in Europe.

US consumers spend

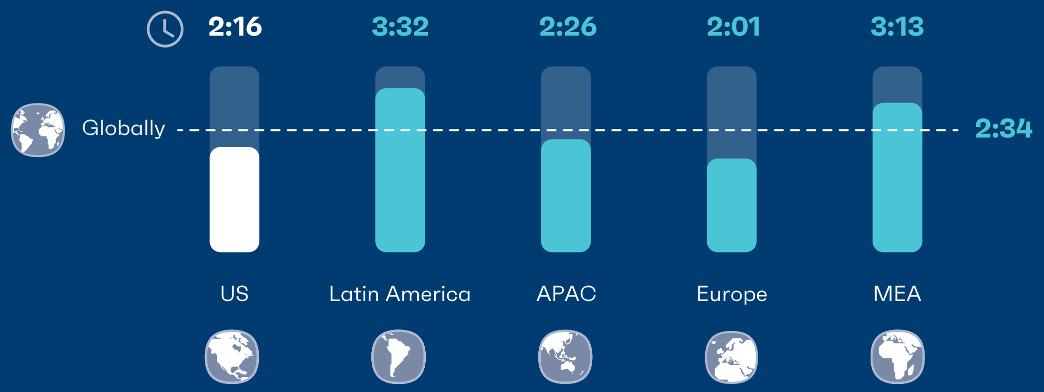
13%

less time on social media per day compared to the global average

The US ranks lower than the global average

1

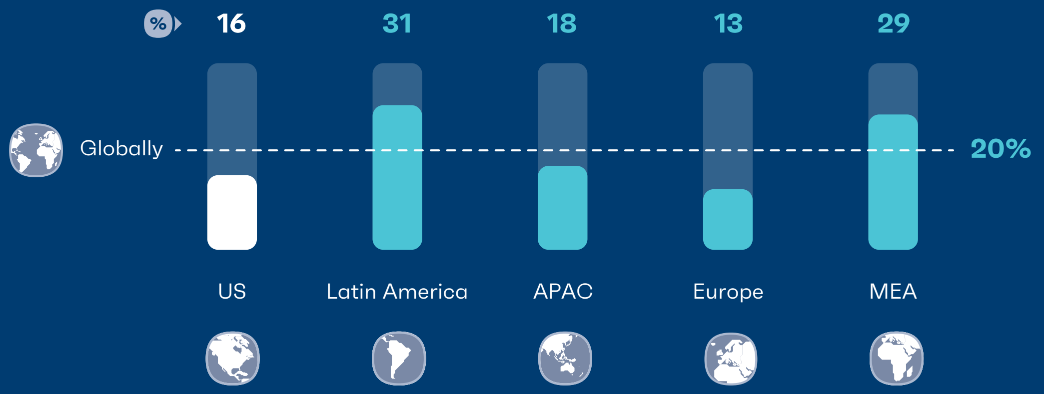
Average time spent using social networks per day in h:mm



The heaviest social media users aren't found in America

2

% who use social media more than 4 hours a day



GWI Core Q1 2023

216,646 internet users users aged 16-64 outside China, and 25,340 US internet users aged 16-64

Pandemic to present: the altered landscape of social media

Gen Z spends over 3 hours a day on social media, the highest among all generations. This is understandable considering they have grown up with it as an integral part of their culture and daily lives. However, it's crucial to recognize that as Gen Z spend more time online, they're more aware of the negative impacts of social media. They're 2x more likely than the average American to say that social media has a negative effect on their mental health. As a result, Gen Z are more critical of social media and mindful of their usage.

For brands and social platforms, balancing how Gen Z spend time online with their health concerns can be tough to navigate. In our data, we've seen an 8% increase since Q1 2022 in US Gen Z wanting brands to be authentic, so this is where **realness** comes into play.

For both Gen X and baby boomers, time online has remained stable. But since Q1 2021, the number of 50-64-year olds with 5+ social media accounts has grown by 37%. This tells us that older consumers not only spend more time online, but have an openness to exploring several social media platforms. In the same timeframe, baby boomers have shown a 13% increase in discovering brands through ads on social media, highlighting the effectiveness of both traditional and new media in capturing their attention.

The growth in older consumers' presence on social media presents an exciting opportunity for brands that shouldn't be ignored. With 61% of baby boomer social media users agreeing that when they find a brand they like they stay loyal to it, 74% higher than Gen Z, there is a valuable opportunity to cultivate strong brand loyalty within this affluent demographic. By **customizing content**, advertisements, and user experiences to resonate with the interests and values of older consumers, marketers can truly thrive in the ever-changing digital landscape.

Take a deep dive on today's 'it' consumer: Your 2023 US Gen Z vibe check

Download report

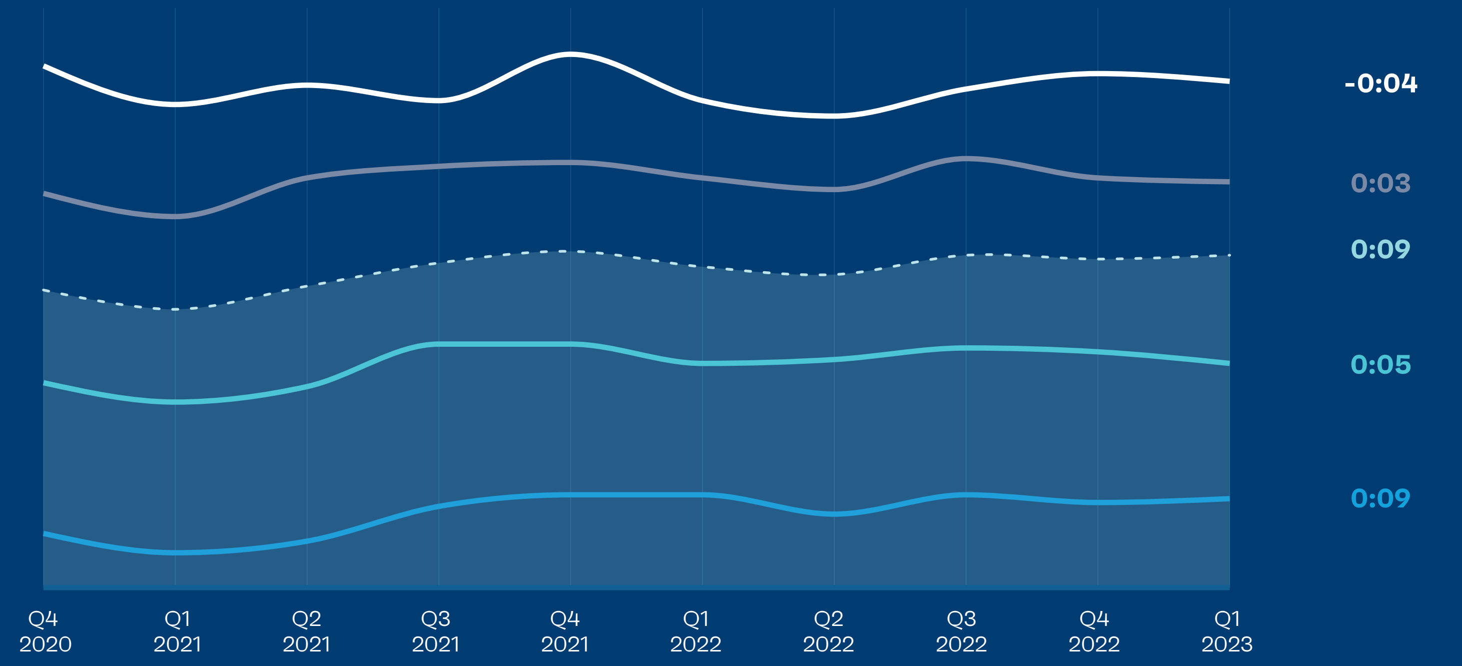
3

Scrolling from the pandemic to now

Average time spent using social networks per day in h:mm

US · Gen Z · Millennials · Gen X · Baby Boomers

Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Change in minutes since Q4 2020
3:05	2:55	3:00	2:56	3:08	2:56	2:52	2:59	3:03	3:01	-0:04
2:32	2:26	2:36	2:39	2:40	2:36	2:33	2:41	2:36	2:35	0:03
2:07	2:02	2:08	2:14	2:17	2:13	2:11	2:16	2:15	2:16	0:09
1:43	1:38	1:42	1:53	1:53	1:48	1:49	1:52	1:51	1:48	0:05
1:04	0:59	1:02	1:11	1:14	1:14	1:09	1:14	1:12	1:13	0:09



GWI Core Q4 2020-Q1 2023 · 254,445 US internet users aged 16-64

Unveiling the authenticity trend

The US stands out against other countries for using apps like BeReal, Reddit, and Tumblr. This reflects the growing trend of Americans wanting to see authenticity on social media, and where community creates an appealing place for users to connect about **real-life experiences.** The use of Reddit by US consumers on a monthly basis has witnessed a notable 15% year-on-year increase, and users of the app are 31% more likely than the average internet user to use social media for discovering like-minded communities.

A new addition to the mix is BeReal, an app that strives to break away from the pursuit of picture-perfect moments and instead showcases the real aspects of life. Between Q4 2022 and Q1 2023, there was a 5% increase in users on the app, and users' main reasons for using the app are its ease, that their friends are on it, and that it's fun. The platform recently added **RealPeople** to further amplify the quest for genuine content by offering users an unfiltered view into the lives of the world's most captivating actors, athletes, and activists.

As Americans focus on community and authenticity on social media, emerging and niche identity subcultures have significant implications for marketers and brands.

Understanding and tapping into these micro-communities allows brands to connect with highly targeted audiences and create more personalized, tailored messaging.

"Despite still spending 1 in 6 of their waking hours on social media, it's perhaps no surprise to see young adults placing greater importance on going out into the real world and meeting real friends. Make no mistake though – Gen Z will continue to document those IRL exploits on their socials, just as they'll continue to scroll content and shop the feed. For marketers, the trick is to focus on the "life" part, not the tech or the media.

SIMON KEMP
Founder and CEO of Kepios, globally recognised thought leader in digital marketing, and an active marketing consultant and practitioner.

02

The top performing platforms

Crowd pleasers: the role of legacy social platforms

There's no denying the growth of TikTok in recent years, and its appeal to Gen Z should come as no surprise with 63% using the app weekly - but other generations have been influenced by their usage too. The number of social media users who use TikTok on a weekly basis has skyrocketed by an impressive 34% in just two years.

Among all generations, TikTok remains the top favorite among Gen Z. Our latest wave of data tells us that Gen Z is more likely than any other generation to engage with viral or funny video clips. This serves as a testament to the lasting hype and relevance of video content on social media.

However, it's equally important to recognize the enduring stability of Facebook. Facebook still remains a dominant social media platform globally, with 66% of social media users outside of China using it at least weekly. In the United States, Facebook maintains its number one spot with 74% of Americans using it at least weekly. This tells us that, despite the emergence of new social media platforms like TikTok, Facebook has managed to maintain its popularity.

The long-standing resilience of Facebook's platform usage can also be linked to a rise in younger consumers taking to the platform. Gen Z's usage continues to rise with those using the platform on a weekly basis, increasing 15% since Q1 2021. This generation is known for their thrifty behavior when it comes to shopping preferences. When Gen Z aren't using the platform for watching videos (42%), they're taking advantage of Facebook Marketplace (34%)— a feature that resonates with their want for affordability and sustainable consumption. Brands should pay attention to this, catering to Gen Z's preferences by offering budget-friendly options and highlighting the sustainability benefits of their products or services, especially as more are turning to Facebook for this type of shopping experience.

Among all generations, there has been a 13% increase in the use of Facebook Marketplace or Instagram Shopping since Q1 2021. And it seems to have caught on, with newer social media apps following the trend. TikTok now has a **shopping feature** where users can order straight from the app, catering to their vast Gen Z following and their shopping desires.

Top social media platform usage has fluctuated

% of users who say they use these apps on at least a weekly basis and the % change since Q1 2021

GWI USA Q1 2023 167,129 US social media users aged 16+

Social media crossovers

There's a common mis-conception that new social media platforms automatically replace old ones. And in the hype and discourse of newer platforms, many marketers believe that new social media platforms can replace trending ones, but this isn't always the case. When building a marketing strategy, it's crucial to consider that a significant portion of your target audience is using multiple platforms. This realization opens up opportunities for focused efforts, and prompts brands to question the worth of investing in a new platform when they might be addressing the same audience on another.

It's important to point out that people who consider these platforms their favorite tend to have similar reasons for using social media. Those who favor Instagram and Pinterest for instance, are more inclined than others to seek inspiration through social media, suggesting that both these apps can serve as valuable resources for discovering new products or destinations.

On the flip side, consumers who are fans of Twitter and Reddit are both more likely than the average user to use social media for finding like-minded groups, indicating that cross-platform communities are being built where brands can engage in the conversation.

By embracing new technologies or features, and recognizing their complementary nature, businesses and marketers can stay ahead of the curve without abandoning existing channels and holding a zero-sum mentality. The key lies in integrating old and new technologies to effectively connect brands with their audience, leaving behind the notion of having to choose between them.

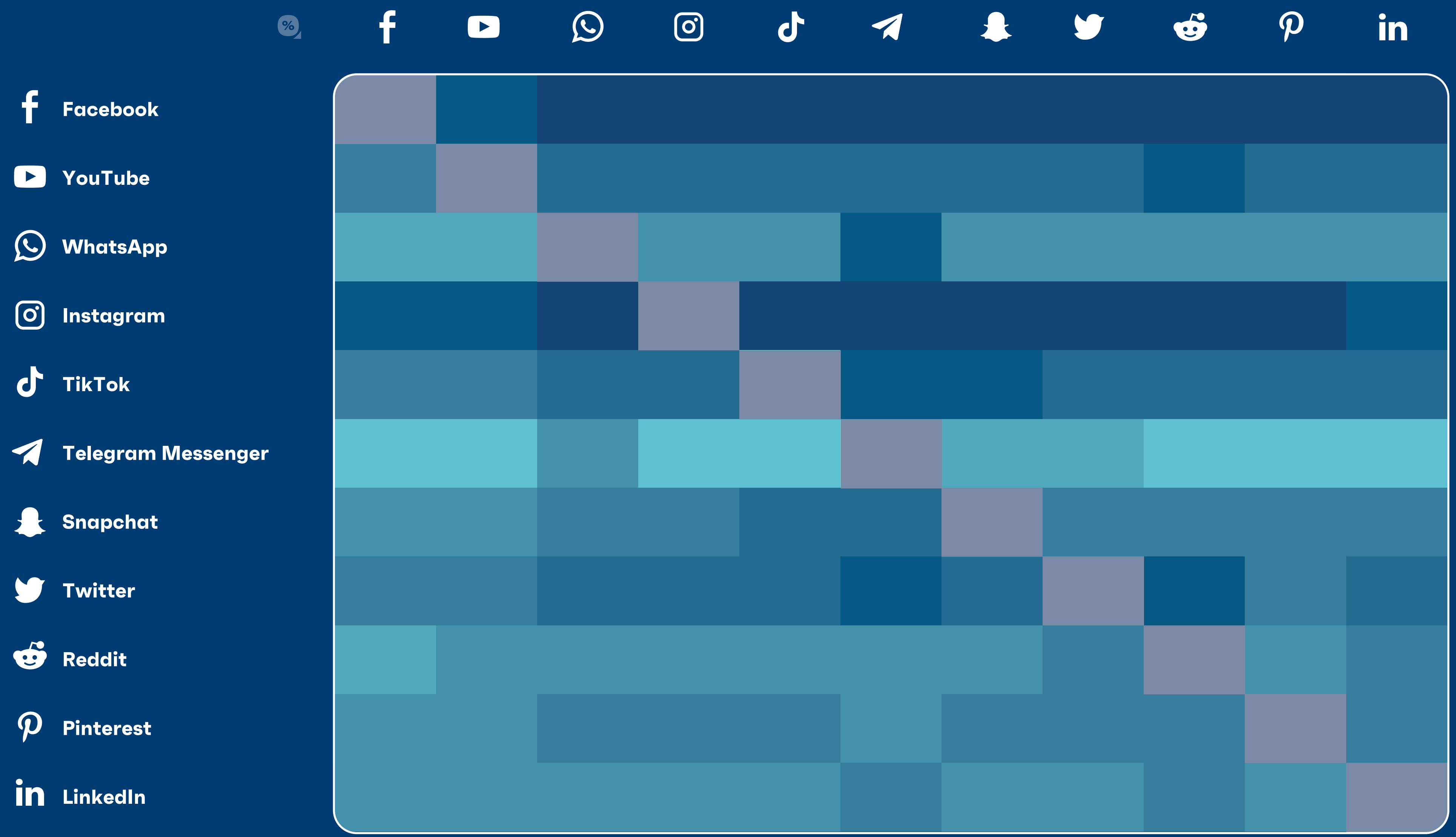
86% of Snapchat users also have an Instagram account

Social media/messaging overlaps in users

% of each social media platform's users who also use the following at least monthly

Low High

N/A



GWI Core Q1 2023 | 25,340 US internet users aged 16-64

03

Behavioral Trends: a vibe check on 2023

Twinning with TikTok

Social media platforms thrive when they offer unique features that set them apart. However, the differences between platforms are starting to blur as they adapt and evolve to keep up with consumer demands. TikTok's success with short-form video has sparked many other platforms like Instagram, Facebook, Snapchat, and Twitter to introduce their own **video features.**

As social media platforms expand their capabilities to accommodate different types of media, they attract new users in hopes to prevent them from seeking alternative options. Our data confirms this video-centric opportunity: among the most popular social media platforms in the US, watching videos ranks among the top five actions for users, and takes the top spot for the majority of actions. Incorporating videos on social media platforms also opens up a broader scope for advertising, and with a 10% year-on-year increase in consumers discovering brands through ads on social media the potential is hard to ignore.

It's worth mentioning that copying features between social platforms is not uncommon. TikTok itself recently added the ability for users to post longer video content on its platform, much like other popular apps such as **YouTube and Instagram**, further blurring the boundaries between newer platforms and older established ones. By leveraging the power of video and embracing the changing landscape of social media, brands can connect with users in more engaging ways and stay ahead of the competition.

Social media actions

6

Rank based on the % of social media users who have done these actions in the last month

Facebook

1. Watched a video
2. Facebook Marketplace
3. Facebook Groups
4. Facebook Stories
5. Clicked on a promo post

Instagram

1. Watched a video
2. Watched Instagram Reels
3. Created Stories
4. Reacted to poll on Stories
5. Clicked on a promo post

LinkedIn

1. Looked for jobs
2. Added new connections
3. Reacted to content
4. Followed a (company) page
5. Watched a video

Snapchat

1. Viewed a Story
2. Watched a video
3. Created a Story
4. Used Memories
5. Used filters/geofilters

Twitter

1. Watched a video
2. Twitter Trending
3. Retweet button
4. Notifications/mentions
5. Favorite button

Reddit

1. Watched a video
2. Up-votied/down-voted posts
3. Checked notifications
4. Left comments/replies
5. Joined communities

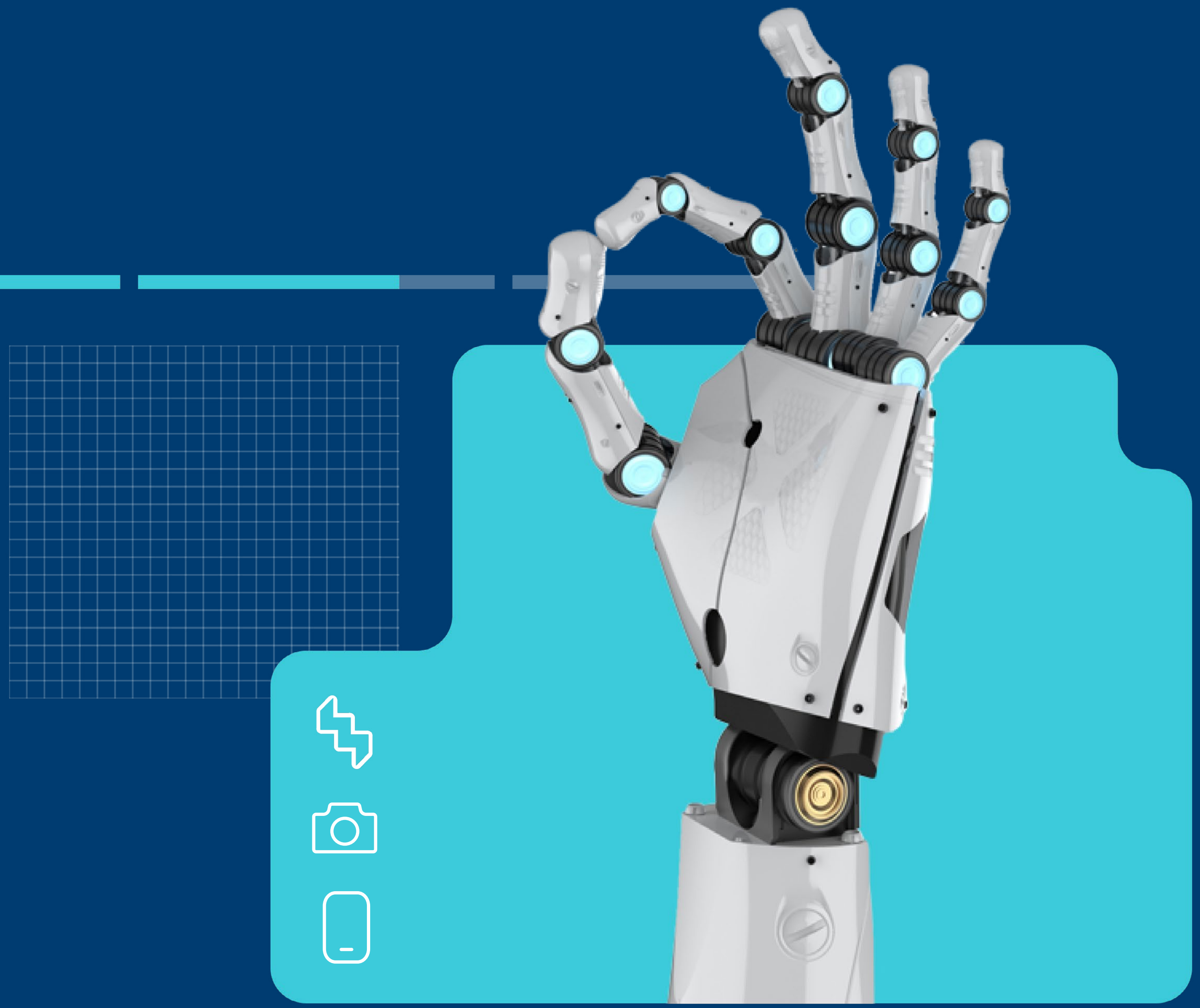
GWI USA Q1 2023 18,512 US social media users aged 16+

All the talk on AI

Since its launch in November 2022, **ChatGPT** has rapidly advanced, raising questions about its uses, enhancements, or implications for the future. While this surge in interest presents many opportunities for brands across a variety of industry sectors, social media platforms could be at an advantage to leverage ChatGPT, or other forms of AI, sooner rather than later.

Some have already embraced this potential. Snap, for instance, has integrated its own AI chatbot, powered by ChatGPT, into the **Snapchat** app. While many consumers have utilized ChatGPT for enhancing productivity, like helping learn a new topic (43%) or improving skills in a certain area (36%), Snap's move positions the tool as a personified companion, fostering an engaging and interactive experience. Notably, our data tells us that 43% of American ChatGPT users engage with the bot as if they were conversing with a real person.

Social media brands should recognize that adaptations to embrace AI into their platforms is crucial to meet evolving user expectations. However, while AI can bring valuable improvements, there are also ethical, data, and user privacy considerations that need to be addressed. The concern surrounding AI has grown significantly, with a remarkable 26% increase in Americans expressing worry between Q4 2022 and Q1 2023 — surpassing the escalation observed during geopolitical tensions following the invasion of Ukraine. Brands will need to consider users' innovation expectations alongside managing these concerns as AI continues to change the online landscape.



Content creation isn't just for influencers

Traditionally, musicians relied on established record labels to gain exposure, taking months to build a reputation. But now, songs can go **viral on TikTok** in a matter of days, leading to millions of listeners, and significant supplemental income.

Social media has, in many ways, revolutionized the way musicians, artists, and other creative individuals promote and showcase their work. Now that content creators have direct access to global audiences, social media enables them to cultivate their own online presence and engage with fans on a more personal level.

Brands can benefit from content creators in multiple ways - especially in user engagement. To enhance audience interaction on your platform, the main focus should be to attract content creators, as their followers are eager to follow their favorite creators. According to our data, 65% of Americans support content creators, with the majority actively engaging by consuming and sharing their content.

In an era where micro-community culture thrives online, especially in the US, having content creators on your platform is a sure win. Collaborating with these creators will keep user engagement high and advertisers curious to join in. Pinterest is an example of where social media platforms can build on this opportunity, by adding **shoppable links** into lifestyle pins created by content creators, resulting in a win-win scenario for both the creator and the brand.

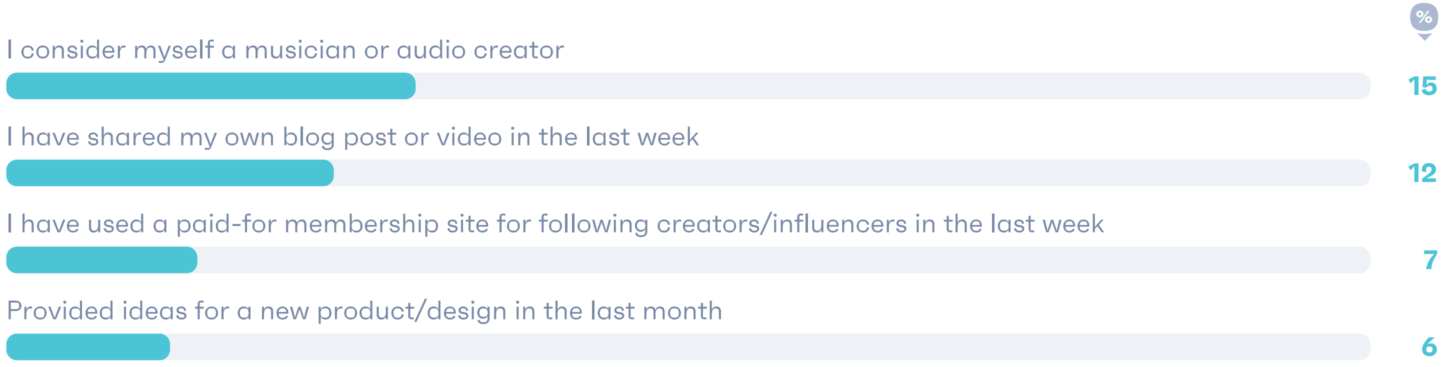
> Discovery is the key to broadening perspectives, building skills, and inspiring action. At Pinterest, discovery is the heartbeat of our platform, and we'll continue to help our users to find, plan, shop, and take action on inspiring ideas.

DARON SHARPS
Pinterest, Global thought leadership research lead

The scope of content creation

7

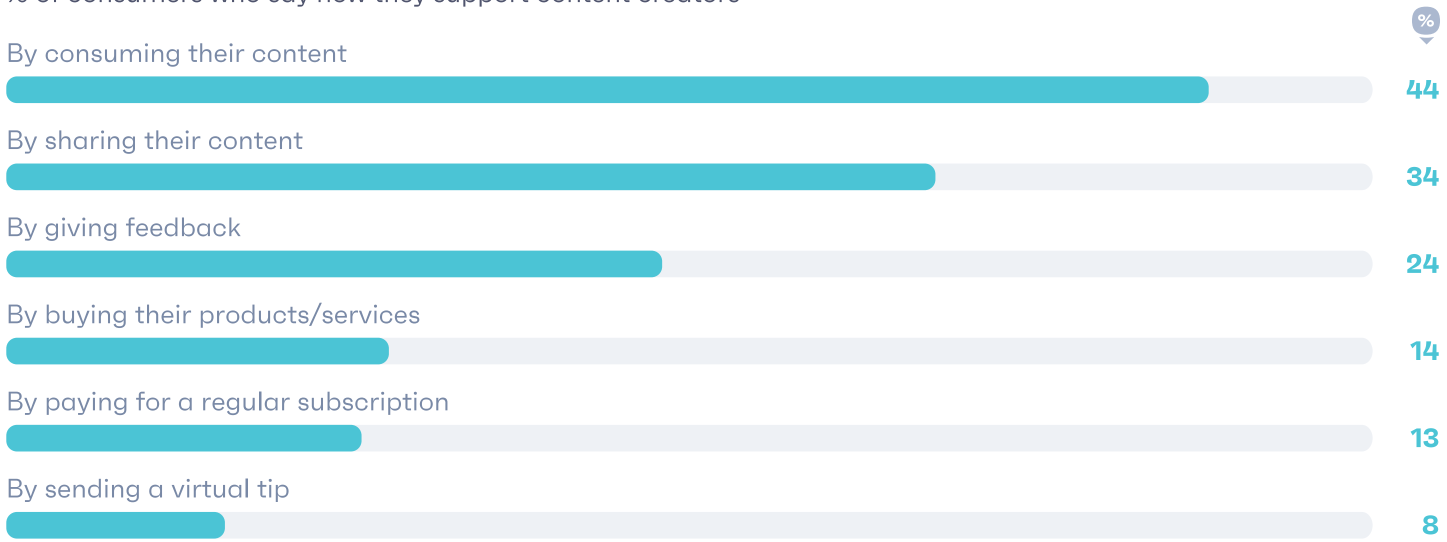
% of consumers who do the following



Consumers support creators by watching and sharing

8

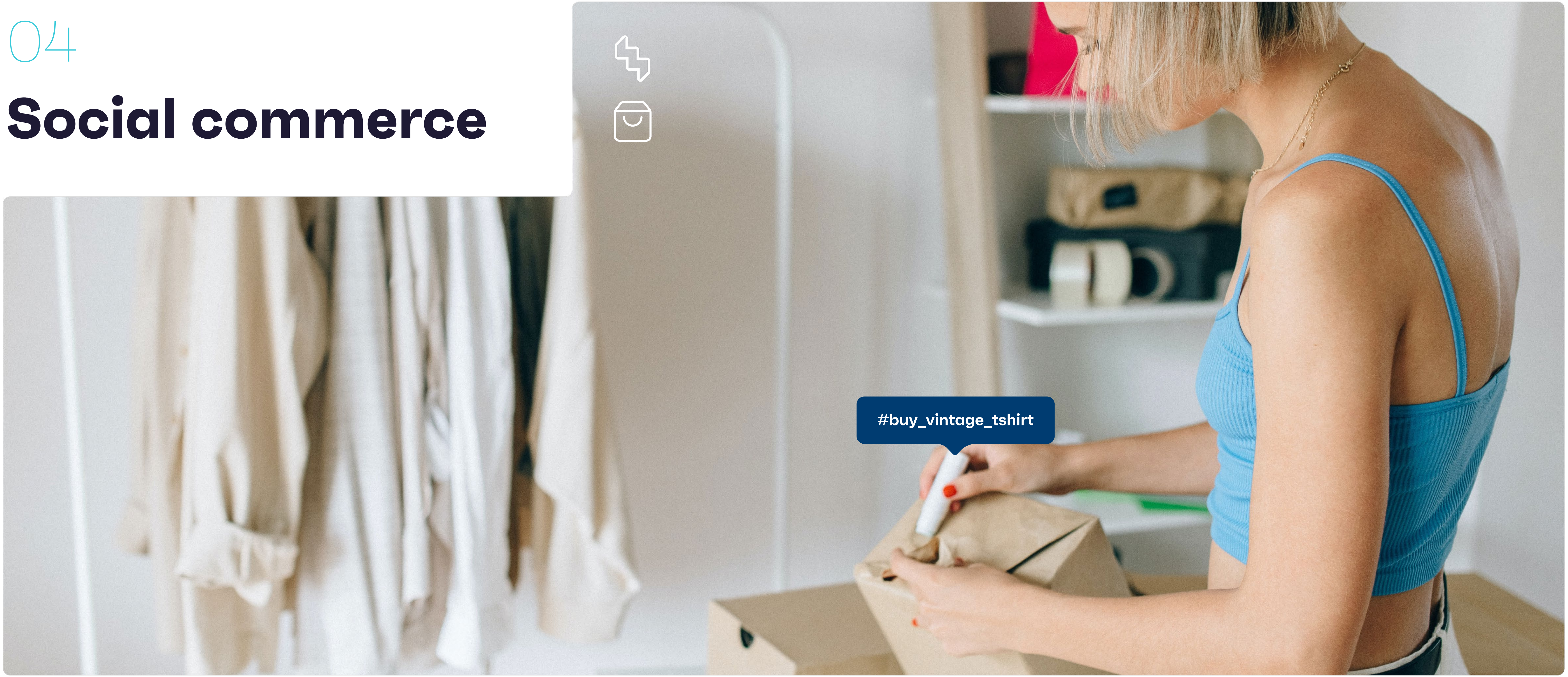
% of consumers who say how they support content creators



GWI Core Q1 2023 25,340 US internet users aged 16-64
GWI Zeitgeist January 2023 2,051 US internet users aged 16-64

04

Social commerce



Window scrolling

The growing trend of social commerce is fueled by the desire for an authentic journey, where it feels less like an ad and more like organic discovery.

Social media has become a space for product exploration. Brand discovery on social media has seen growth across all demographics, but especially among younger generations. Gen Z's are now turning to social media as their go-to source for answers, surpassing search engines. When it comes to social media marketing strategies, while ads still hold their ground, social media posts are closing the gap, not only showcasing consumers' growing preference for taking charge of their shopping experiences, but also opening doors for brands to build on their presence in a more integral way as users scroll on their feeds. When looking at other ways consumers interact with brands on social media, the percentage of consumers who click on sponsored posts is relatively low compared to ads or **creator posts**. On platforms like TikTok, users are more likely to follow creator accounts and explore their "discover page" than to click on promoted posts. Similarly, interacting with sponsored posts on Snapchat is the least common action reported by consumers in the past month, indicating that consumers may see sponsored content as less authentic or natural compared to other types of posts.

Brands should look towards user-controlled discovery when considering their ad spend, and consider investing in roles that support digital marketing and social media management, particularly when traditional advertising can feel artificial to social media users.

Millennials are

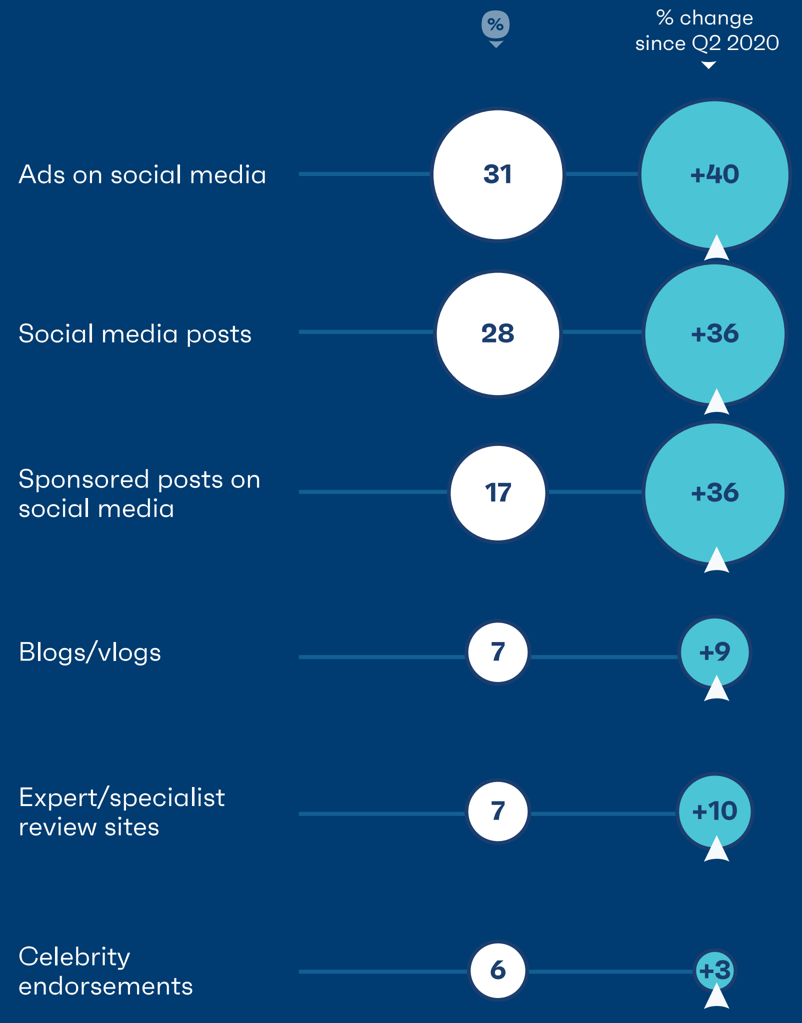
58%

more likely than the average American to say they are more vocal about brands because of social media

Where brand discovery happens

9

% of internet users who typically find out about new brands/products via the following, and the % change since Q2 2020



GWI USA Q1 2023 20,091 US social media users aged 16+

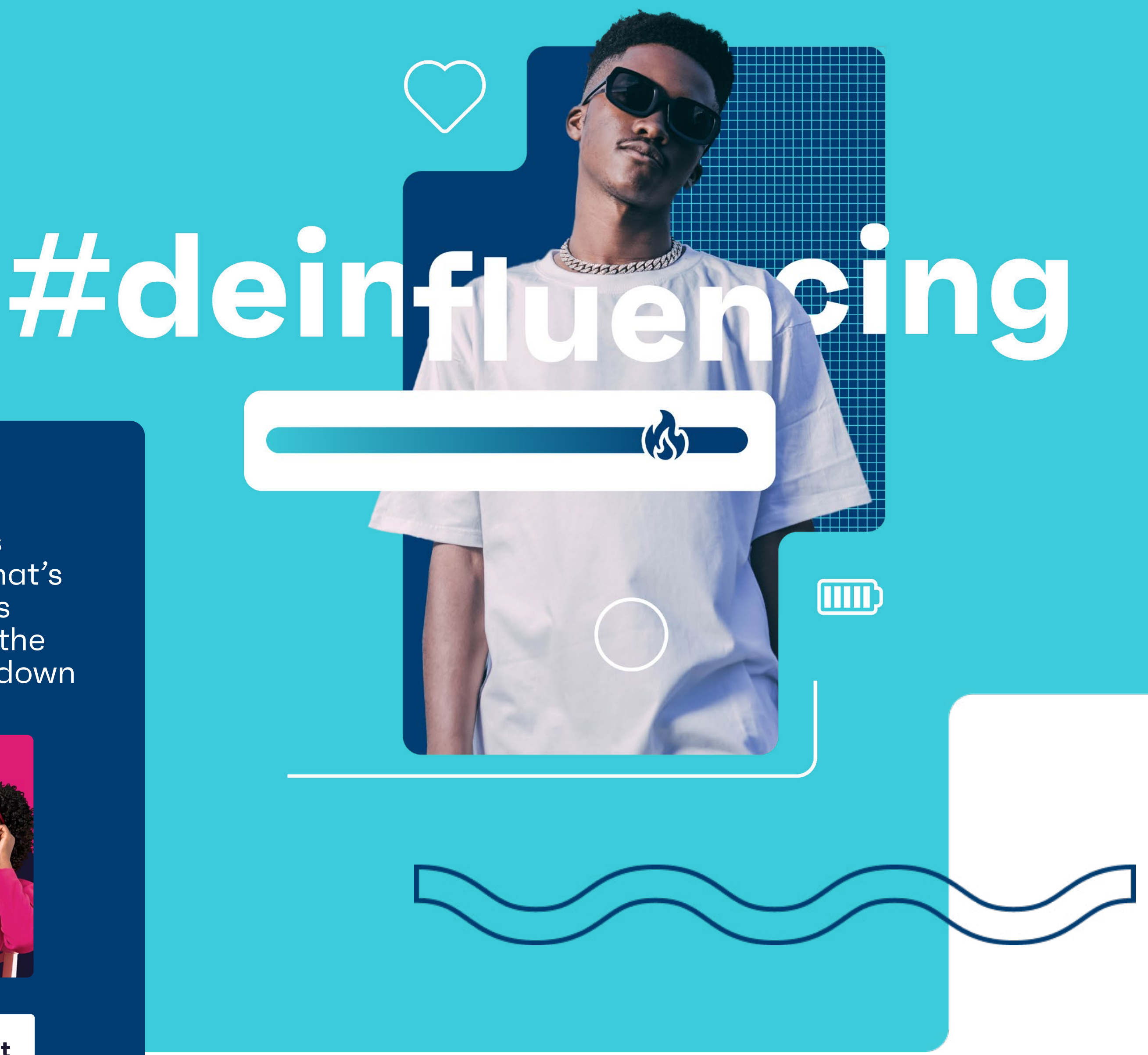
De-influencing: has it taken off as we thought?

At the time of writing this report, the **#de-influencing** trend has gained 615.7M views on TikTok. Many factors point to this trend, including concerns about **over-consumption**, and a desire for product transparency. With **economic uncertainty** on the rise, many consumers will look to prioritize their finances, opting to save money by avoiding products that don't live up to their internet hype.

It's important to note that de-influencing is still, at its core, a form of influencing. Often when creators are persuading consumers not to buy a product, they recommend another to purchase instead. **Dupe** trends, particularly those within the beauty industry, go hand-in-hand with de-influencing, where consumers look for an inexpensive alternative to a high-end product. This comes at a time when beauty fans are even looking to get thrifty with their purchases with one-third saying they're looking to spend less on beauty products and personal care. Trust is an important factor here, but brand trust is falling across the board. Only 2 in 10 consumers trust big brands and corporations, with social media trusted even less (13%). Interestingly, young Americans place considerable trust in influencer recommendations. 28% of Gen Z and millennials agree that influencer recommendations are more trustworthy than regular ads. This makes sense, as they're 40% more likely than the average American to follow influencers who share their values, building on the idea that these generations are value-driven consumers seeking information from creatives as opposed to corporations.

There is still ample opportunity for growing trust with older consumers too. When it comes to Gen X and baby boomers, nearly half of these consumers express no trust in brand recommendations from influencers, and they are less inclined to make a purchase based on such recommendations. Nevertheless, Gen X and baby boomers are loyal demographics, making it worthwhile for brands to earn their trust. It's essential for brands to meet them where they are, and recognize that they are not easily swayed by what's considered cool and trendy. As brands navigate the evolving landscape of influencer marketing, the de-influencing trend presents a valuable opportunity. Consumers are seeking authenticity, transparency, and value. To capitalize on this trend, brands should recognize the impact of influencer recommendations and leverage their trust among young Americans.

Simultaneously, there is untapped potential with Gen X and baby boomers, who prioritize loyalty. By tailoring strategies that meet the needs of each individual group, brands can create meaningful relationships and inspire trust in a crowded marketplace.



Find out who's spending & what's trending in this economy, get the slowdown lowdown

Download report

Appendix

1. On an average day, how long do you spend on social media?

2. On an average day, how long do you spend on social media?

3. On an average day, how long do you spend on social media?

4. How often do you visit or use these services?

5. How often do you visit or use these services?

6. What have you done on Facebook/ Facebook Messenger in the last month? • What have you done on Instagram in the last month? • What have you done on Reddit in the last month? • What have you done on Twitter in the last month? • What have you done on LinkedIn in the last month? • What have you done on Snapchat in the last month?

7. In the last week, which of these have you done online? • Which of the following describe you? • Which of the following actions have you done online in the past month?

8. How do you currently support content creators, if at all? A content creator produces entertaining/ informational material for viewers (i.e. a livestreamer, YouTuber, writer/ blogger, podcaster, artist, etc.)

9. How do you typically hear about new products or services?

Notes on methodology

Introduction

Figures in this report are drawn from GWI Core and GWI USA, GWI's online research among internet users aged 16-64 and 16+. 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 mainly draws insights from GWI USA's Q1 2023 wave of research, with a sample of 20,091 respondents. It also relies on GWI Core's Q1 2023 wave of research, with a sample of 241,138 US respondents.

Our 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 & 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.

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