Social Media Monitor

December 2020

Intro

This year's social media platform year-in-review report is unlike any we've done before. Young people's lives were upended early in the year, going into lockdown and changing many of their daily behaviors. Social media usage soared at the start of the pandemic as quarantined young consumers desperately search for ways to stay entertained and escape the news of an unprecedented crisis. But while usage spiked, not all platforms gained more traffic.

This report takes a look at the top social platforms of the year, breaking down number of young consumers using top social apps and sites across the year, from the start of 2020 to today. We also break down where they stand with young users as we begin to prepare for the new year, and what features will be keeping young people interested most.

TL;DR

This year cemented the importance of social platforms as entertainment hubs—and the vital role of video.

During 2020, young consumers turned to social platforms not only to connect with the friends they were separated with, but to stay entertained during times both dark and boring. Apps with video as their focus saw spikes in use, especially with Gen Z. Social video is vital to reaching this group, and going into 2021, all brands need a social video plan.

TikTok saw the most growth this year—and while it might slow down, they have become a benchmark for competitors.

Gen Z flocked to TikTok during the pandemic, making it the fastest growing app of the year. Though that growth is slowing, they clearly have the winning formula for entertaining next generation consumers. Which is why all the big players are now mirroring (ok, copying) their features. Expect TikTok's popularity to stay strong, and their influence on other platforms to continue.

As gaming surged this year, so did gaming social platforms, with Gen Z fueling their popularity.

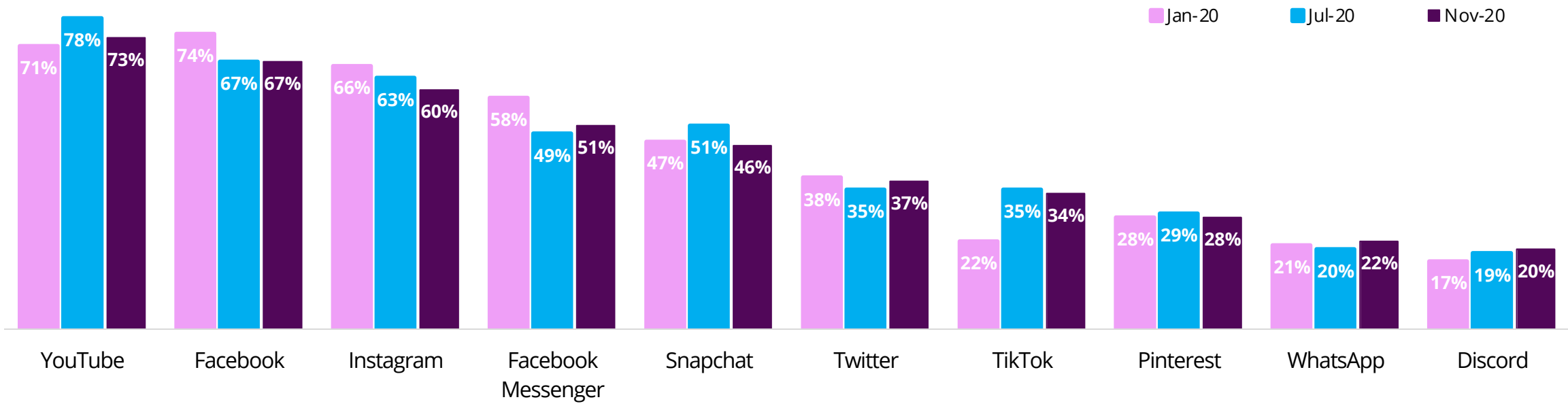
YPulse's gaming report found that young consumers created a boom for the industry this year, with gaming frequency increasing as they sought escape and virtual connections. Gaming social platforms saw their popularity increase in turn, with Discord use surging among Gen Z. All brands should be paying attention to gaming platforms—including these social spaces.

Unlike other platforms, Facebook did not get a 2020 boost about young users, but it's still one of the best ways to reach Millennial parents.

Facebook use decreased slightly among young consumers overall, but the site is still the top-used social platform—and still a top way to reach next gen parents. They're more likely than their non-parent peers to be using Facebook, and to be actively using a variety of its features. Brands focused on Millennial parents shouldn't leave the platform behind.

Video-focused platforms were the ones who saw usage surge during the months of the pandemic.

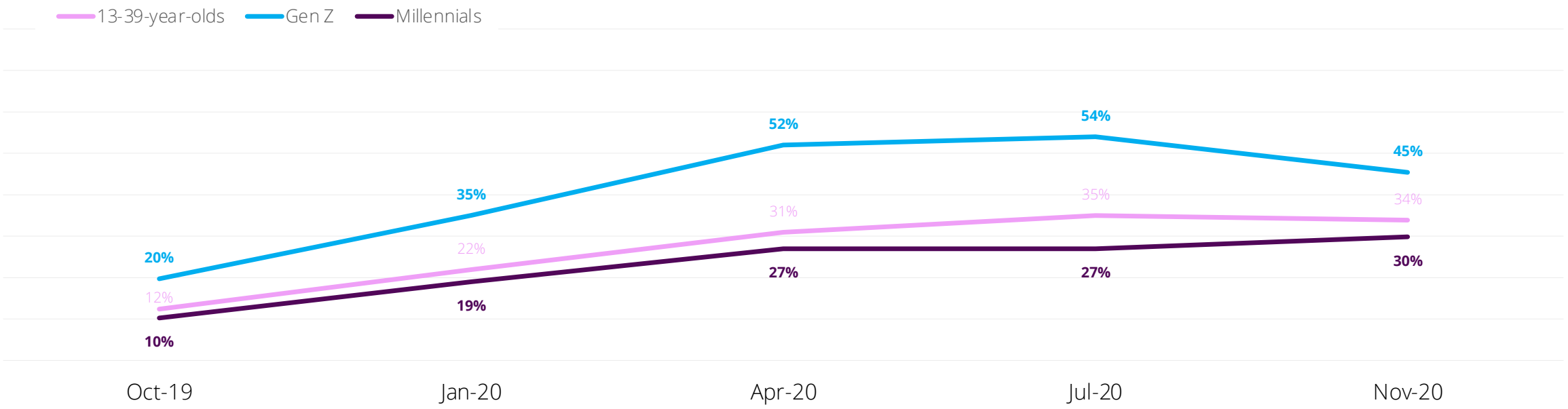
Year Review of Top 10 Social Networks in November 2020



A YPulse special COVID report released early in the pandemic found that social media was the top activity quarantined young consumers were doing in their free time in quarantines. In fact, social media usage increased so significantly among teens, that "worried" parents began enforcing restrictions. Looking back, it's clear that July was the height of social media usage and that video-focused platforms like YouTube, Snapchat, and TikTok had the most to gain in a time period where entertainment was crucial for young consumers.

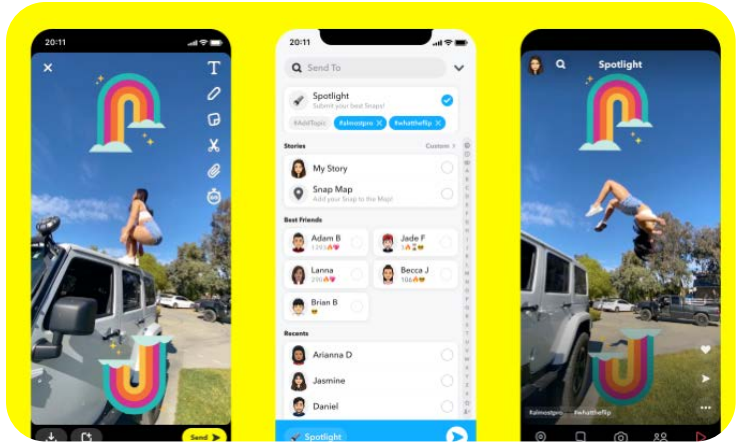
TikTok saw the biggest increase in users this year, but fall schedules & competition is slowing things down.

TikTok as Currently Used Platform



TikTok was steadily gaining popularity late last year, but COVID gave the platform a tremendous boost—especially among Gen Z. Between October 2019 to July of this year, TikTok usage surged from 20% among Gen Z to 54%. However, use of the platform among these younger consumers has dropped slightly recently—likely due to the beginning of school and with increased competition. But TikTok's Millennial userbase continues to increase, and their popularity isn't likely to fade. Instead, they've become a cultural juggernaut in a record amount of time and are setting the trends that other platforms are following.

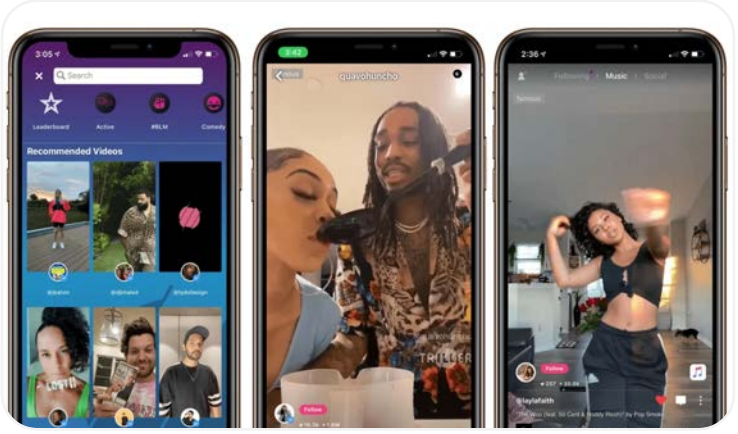
In the wake of TikTok's success, copycat features and platforms are everywhere, amping up competition .



Snapchat's Spotlight
Snapchat has added the ability to add song clips to snaps setting itself up to compete with TikTok, and now the platform is launching a new "Spotlight" section, which like TikTok, will serve up videos in a vertical feed that users can swipe through. Snap will pay $1 million per day through the end of the year to users who share the most popular clips, incentivizing young people to upload their best content. But not only is Snapchat trying to directly compete with TikTok but collaborate with the popular app as well. Snap knows that, and to incentivize young users to come to Snapchat for their creative tools, they unveiled special lenses to be used solely on TikTok, teaming up with four popular creators from the app—like Jalaiah Harmon and Dixie D'Amelio.

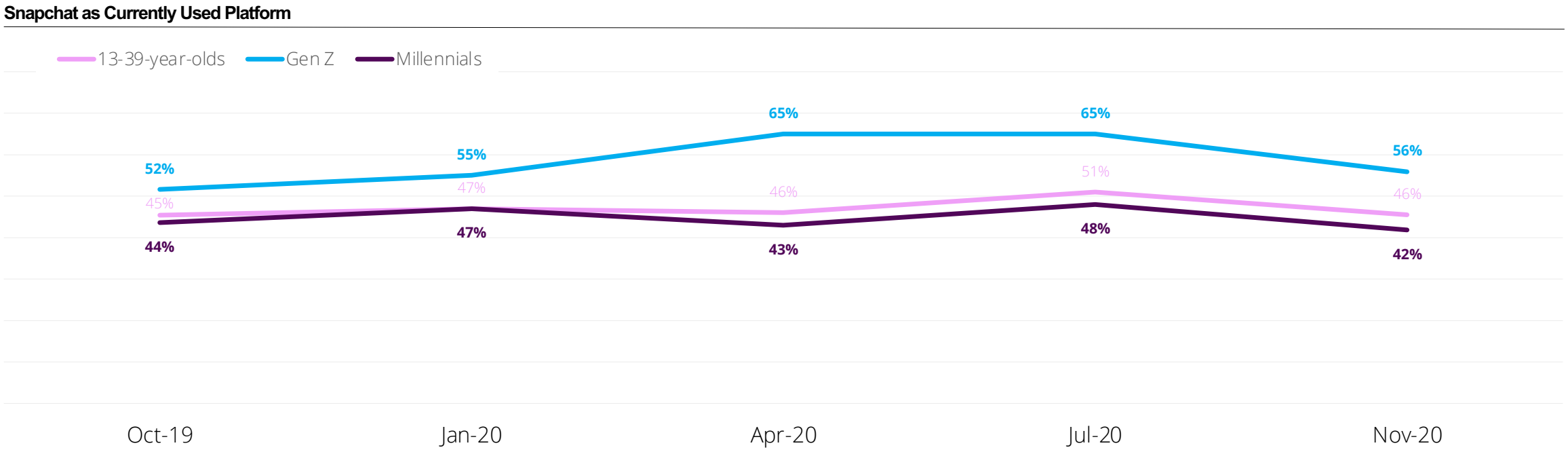


Instagram Reels
Launched in August, Instagram Reels is Instagram's new TikTok-esque feature "designed specifically for short-form, creative content" that allows users to post 15-second clips set to music or audio. The feature lives inside Instagram Stories, rather than requiring the use of a standalone app. The videos won't stick around like they do on TikTok—unless users decide to specifically add them to their own profile. With talks of the TikTok ban around the time of launch, Instagram Reels was set up to be young users' next best alternative.



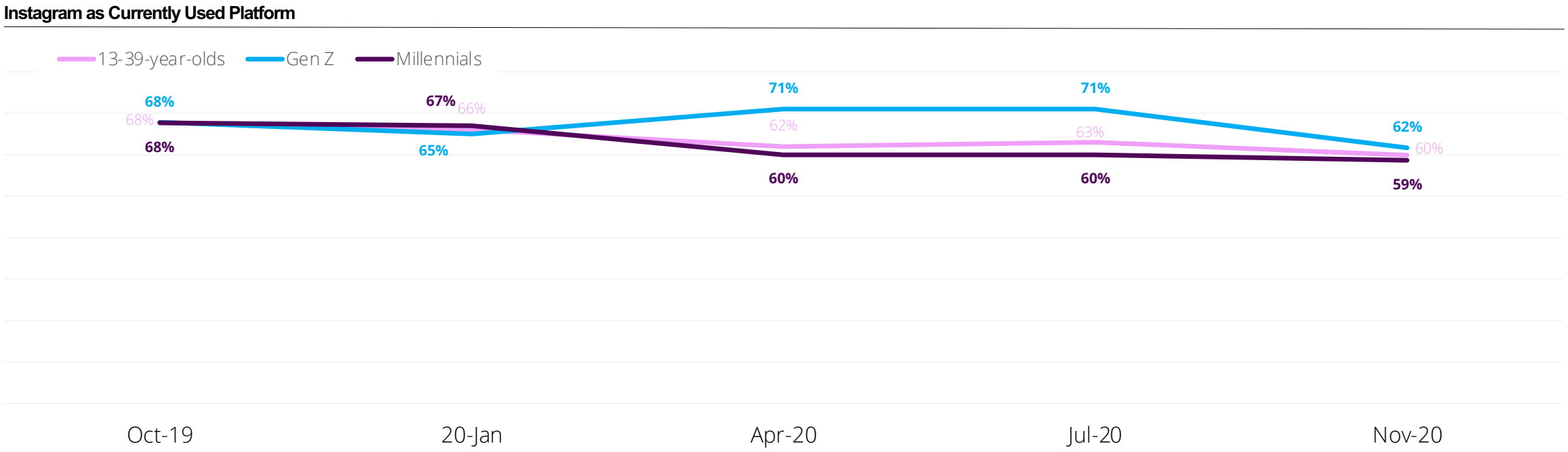
Triller App
Short-form video app Triller has been a direct rival to TikTok for some time, and when talks of the TikTok ban began to surface they jumped at the opportunity, shelling out money on lavish gifts to grab their top influencers. Some of Sway House's migrated to the platform, with members offered Triller roles if they posted more content to the app, while Charli D'Amelio opened an account as well and was given a black Rolls Royce with a TRILLER vanity plate. To recruit top influencers and keep them interested, the app has been using "Triller money" to buy many of them fancy cars, rent out mansions so they can start creator collectives, where the company pays for bills, housekeeping, groceries, and "Whatever the talent needs to make content."

Snapchat also experienced a COVID-19 lift, and shouldn't be ignored.



Snap has rallied during the COVID crisis, increasing its revenue 44% and seeing a spike in users in the first quarter. The company believes the momentum will continue on even after lockdowns are lifted, saying high schoolers "will use Snapchat in college, after graduation and as they get older." YPulse data shows a Snapchat peak among Gen Z in July, as with many platforms, they've seen usage drop in more recent month. But with the integration of Snapchat's TikTok-esque new "Spotlight" section in their corner, popularity may rise again.

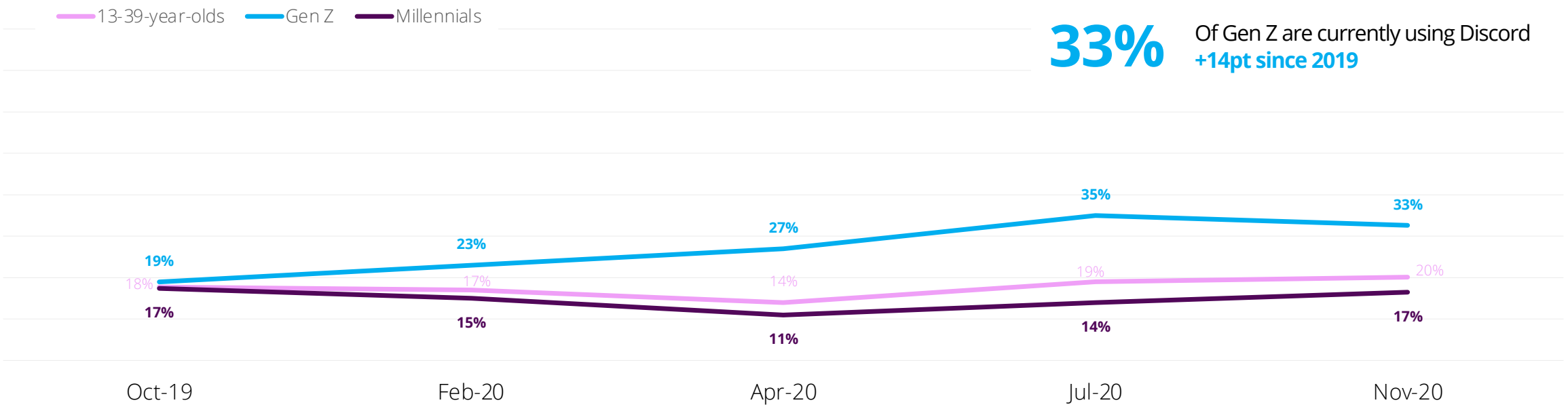
Instagram is still one of the top platforms among young consumers, but will need to work to keep their users.



Use of Instagram during 2020 saw a mild surge, but mainly remained steady. It's not too surprising they didn't see massive growth: Instagram already has the majority of both Gen Z and Millennials in their user base, so it's far, far more difficult to gain more. And the platform will have to work to hold on to young consumers as competition for their attention increases. The app's recent integration of its TikTok copycat Reels is just one example of the platform's adoption of new tools to keep Gen Z and Millennials entertained. They're also amping up shopping functionality on the app, leaning into their role in product discovery among young people.

Gaming as an entertainment source gave Discord more Gen Z users than ever.

Discord as Currently Used Platform



Young consumers in quarantines searching for entertainment have fueled a boom for video game brands, and YPulse's recently released gaming report revealed it's not slowing. During the start of the pandemic, young consumers were turning to "niche" platforms instead of the much broader platforms like Facebook and Twitter. Discord (whose sign-up rate went up 200% since the start of the pandemic) has become a haven for gamers to play together, and the platform has seen a 14pt increase among Gen Z users compared to last year.

Facebook is facing a lack of interest among young users, but Millennial parents may be its saving grace.



64% of Millennial parents are currently using Facebook **(vs 29% of non-parents)**

***83%** use it daily (vs 56% of non-parent users)*

***73%** post content or comment daily (vs 42% of non-parent users)*

Facebook Usage among Parents	parents	non-parents
Currently uses Facebook Messenger	**64%**	43%
Uses Facebook Marketplace	**36%**	18%
Uses Facebook private groups	**29%**	15%
Uses Facebook Live	**27%**	7%
Uses Facebook Check-ins	**25%**	11%

Facebook usage has decreased from the start of the year to now, but Millennial parents are still going strong on the site. Facebook is the number one social network parents are spending most of their time on, and they are much active as users compared to non-parents. They are significantly more likely to use the platform daily and post content or comment daily, and also much more likely to use features like Facebook Marketplace and private groups.