

**Bespoke Market Intelligence**

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# **FB vs. TikTok Data Analysis**

**March 2022**

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## Overall Thoughts:

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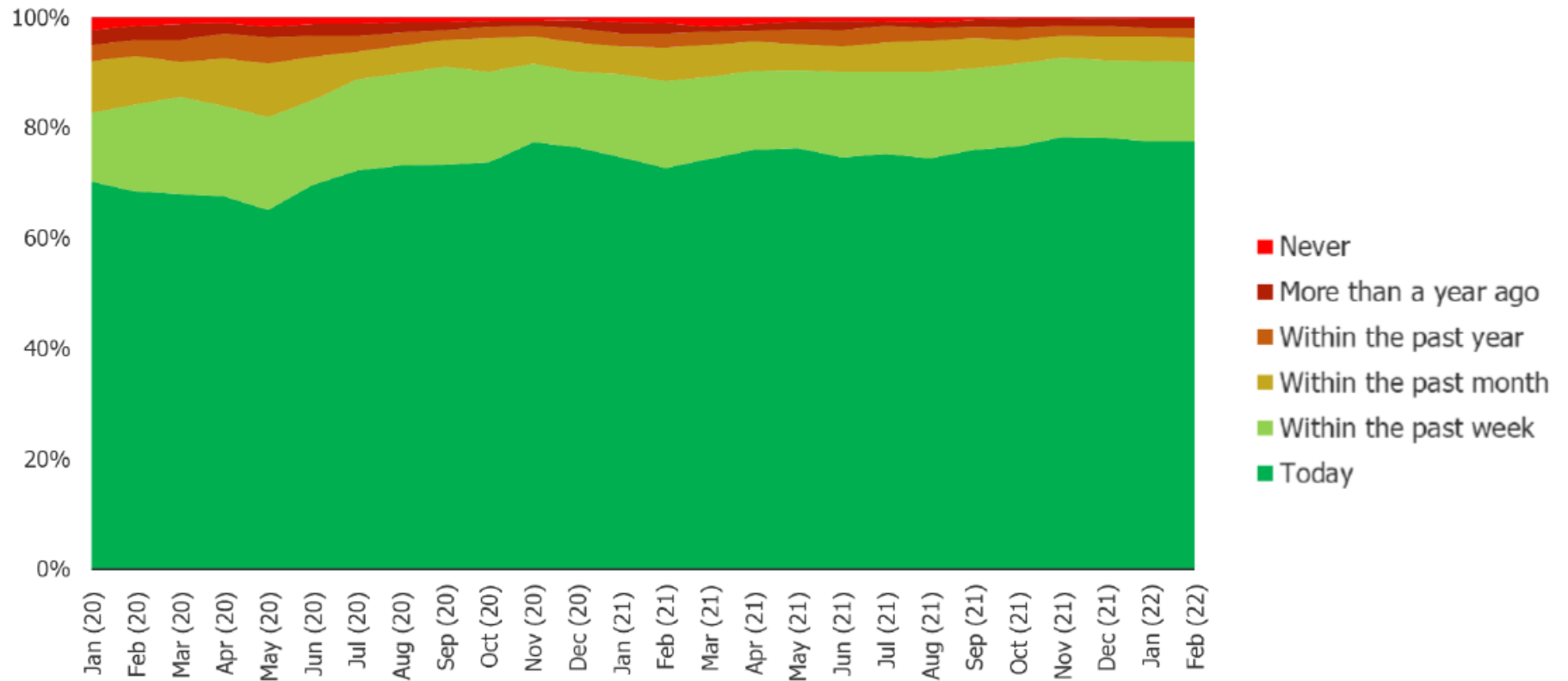
- **TikTok isn't causing material changes to our survey engagement and sentiment KPIs related to Facebook overall.**
- **Where TikTok is making more noise is at the front of the funnel, ie, among 18-24 year-olds.**
- **BUT, in the front of the funnel the time pie is larger that they are competing for.**
- **AND, overall, the use cases for Facebook and TikTok are demonstrably different.**

**Takeaway: Facebook users who ALSO use TikTok don't show material differences in engagement KPIs tracked over time relative to Facebook users who DO NOT ALSO use TikTok.**

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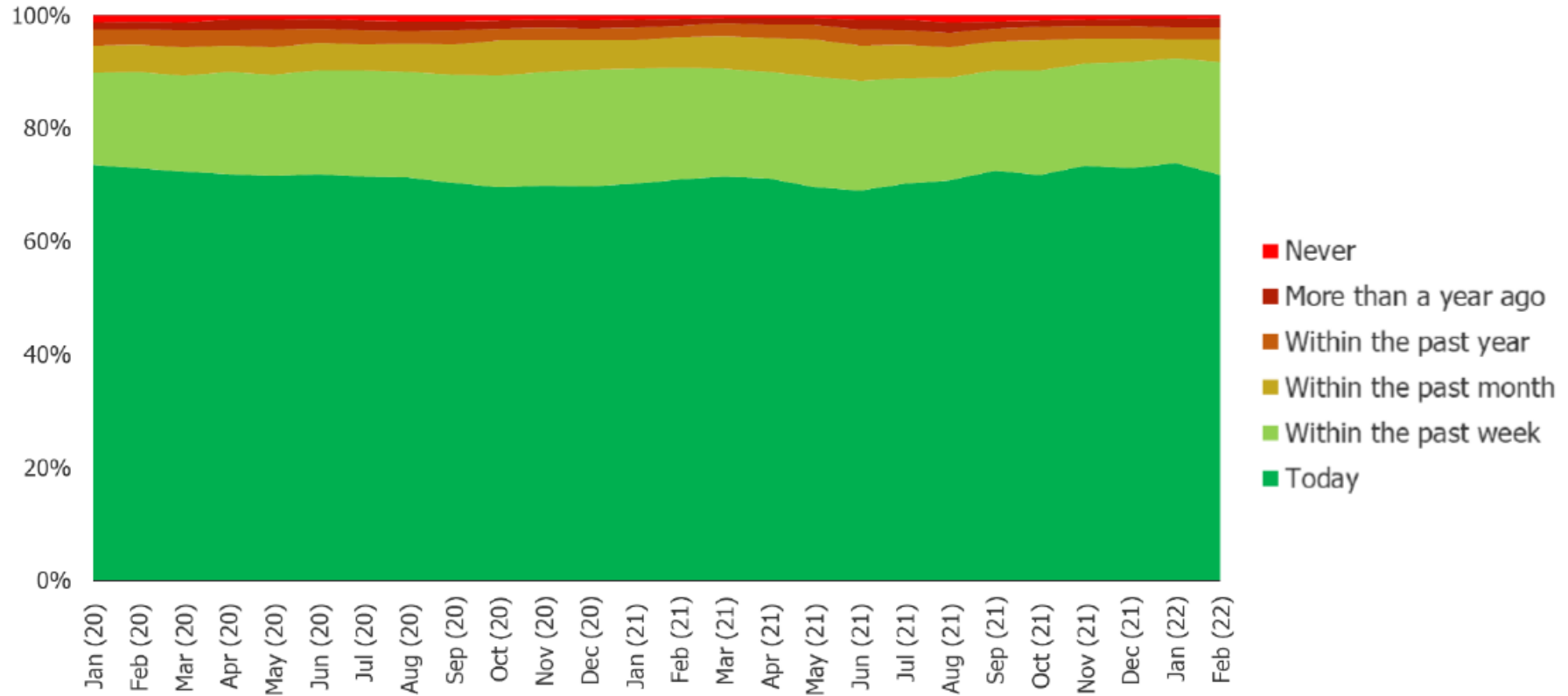
## Facebook Users Who ALSO Have An Account With TikTok

### Facebook Visit Recency



## Facebook Users Who DO NOT Have An Account With TikTok

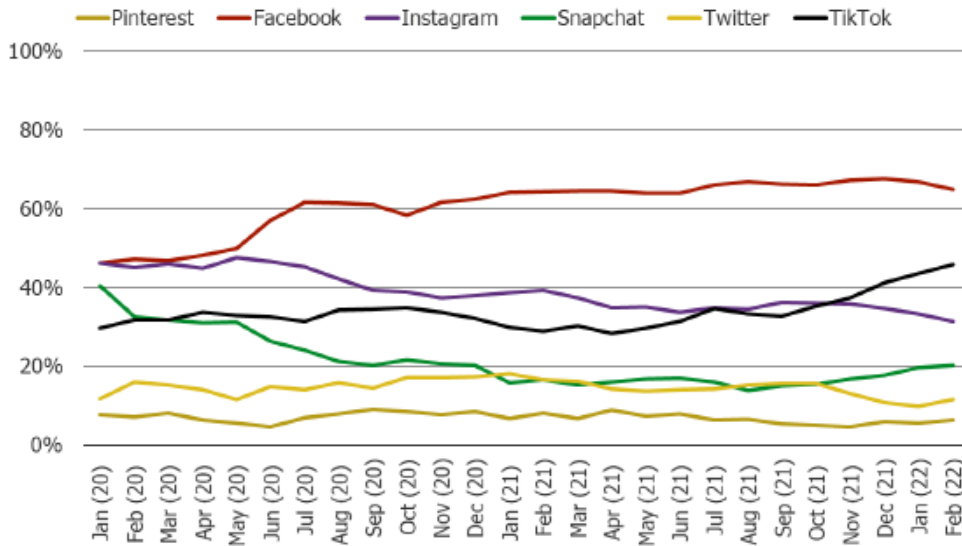
### Facebook Visit Recency



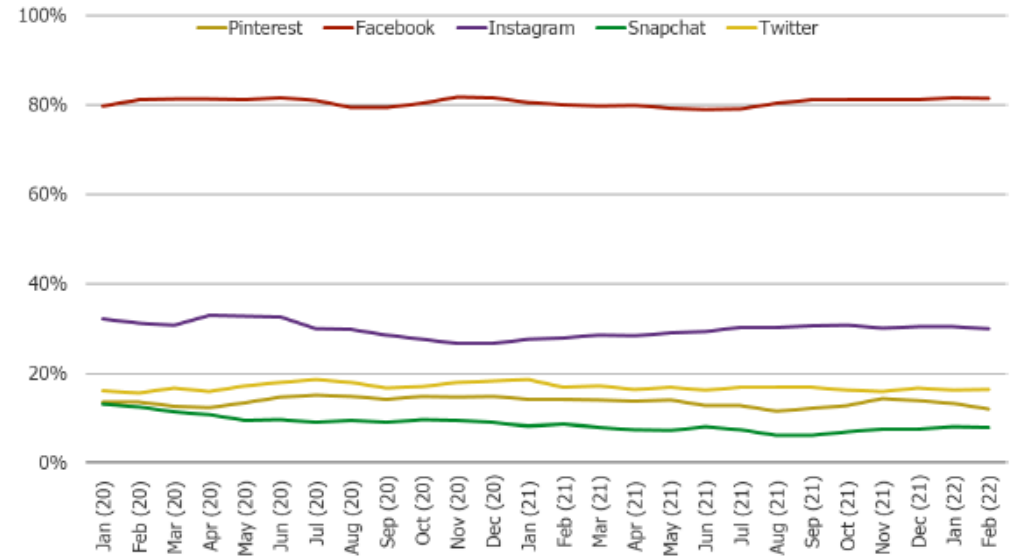
## Facebook Users (Has Account With Tiktok vs. Doesn't Have Account With TikTok)

### Top Two Social Platforms Responses Uses

Facebook Account Holders Who ALSO Have Account With TikTok

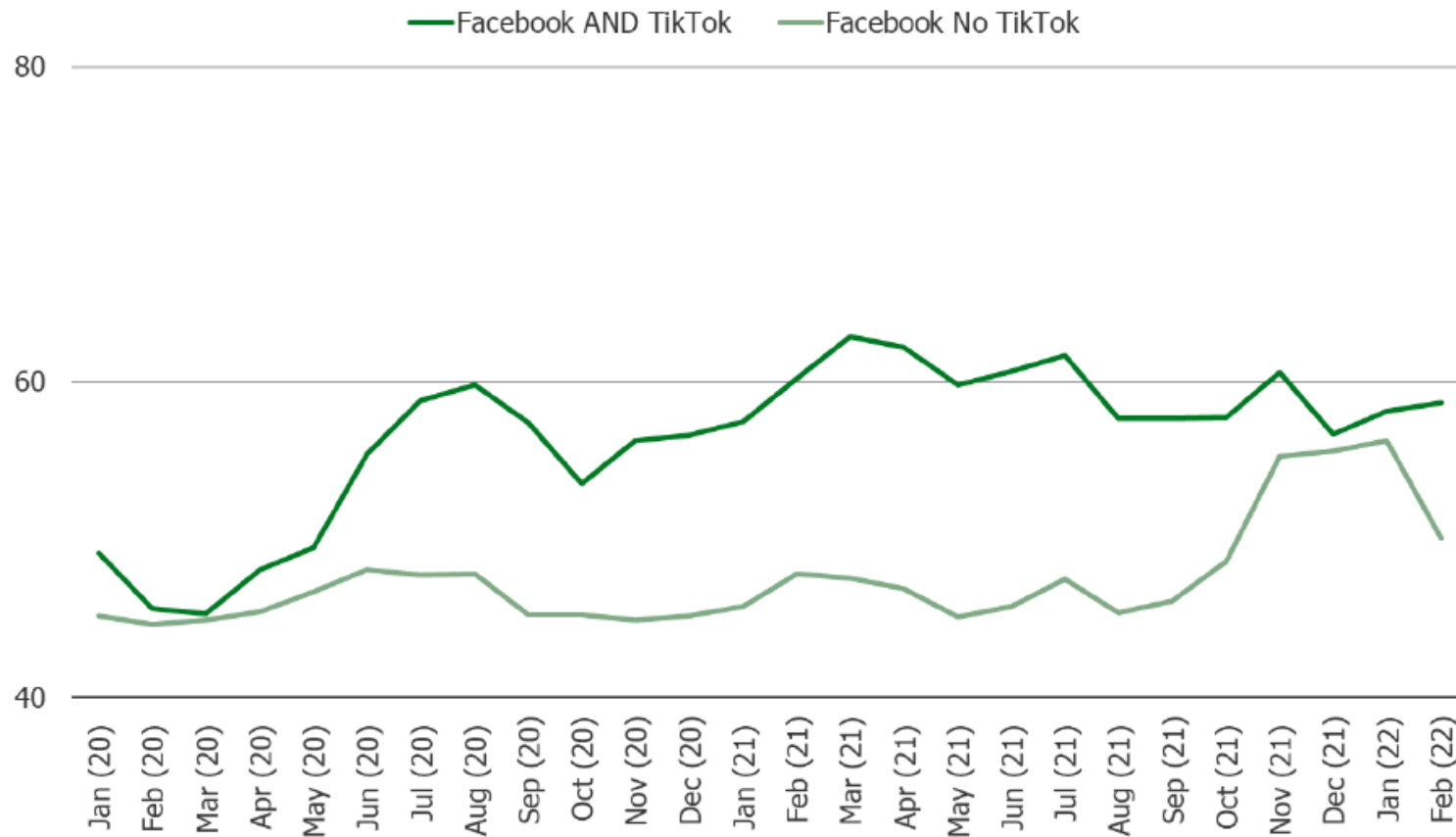


Facebook Account Holders Who DO NOT Have Account With TikTok



## Minutes Per Day on Facebook

Posed to respondents who said they visited Facebook the day they took our survey each month



Darker Green Line: Respondents who have accounts with both Facebook AND TikTok

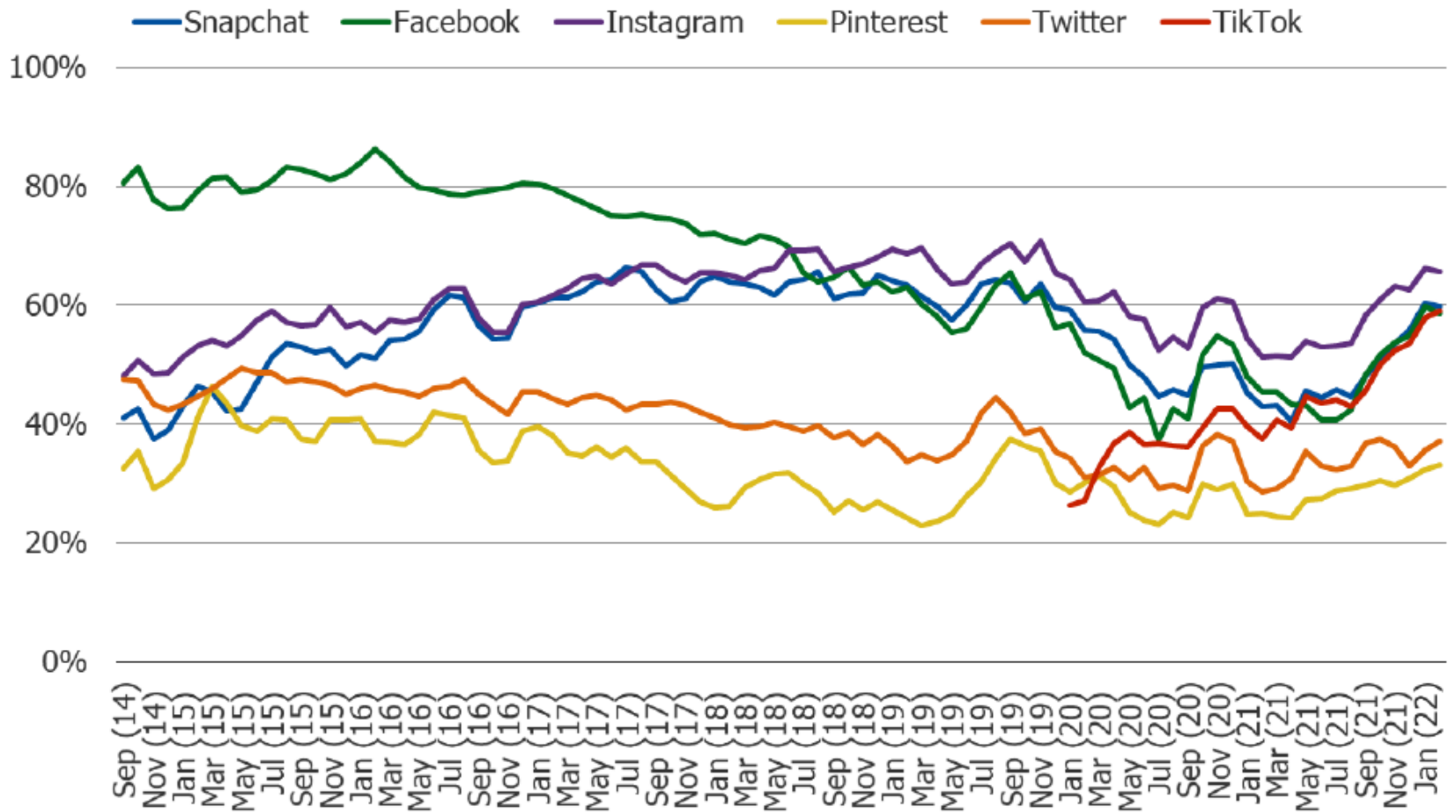
Light Green Line: Respondents who have account with Facebook BUT NOT with TikTok

**Takeaway:** The front of the funnel (younger age cohorts) is simply more crowded than older age cohorts.

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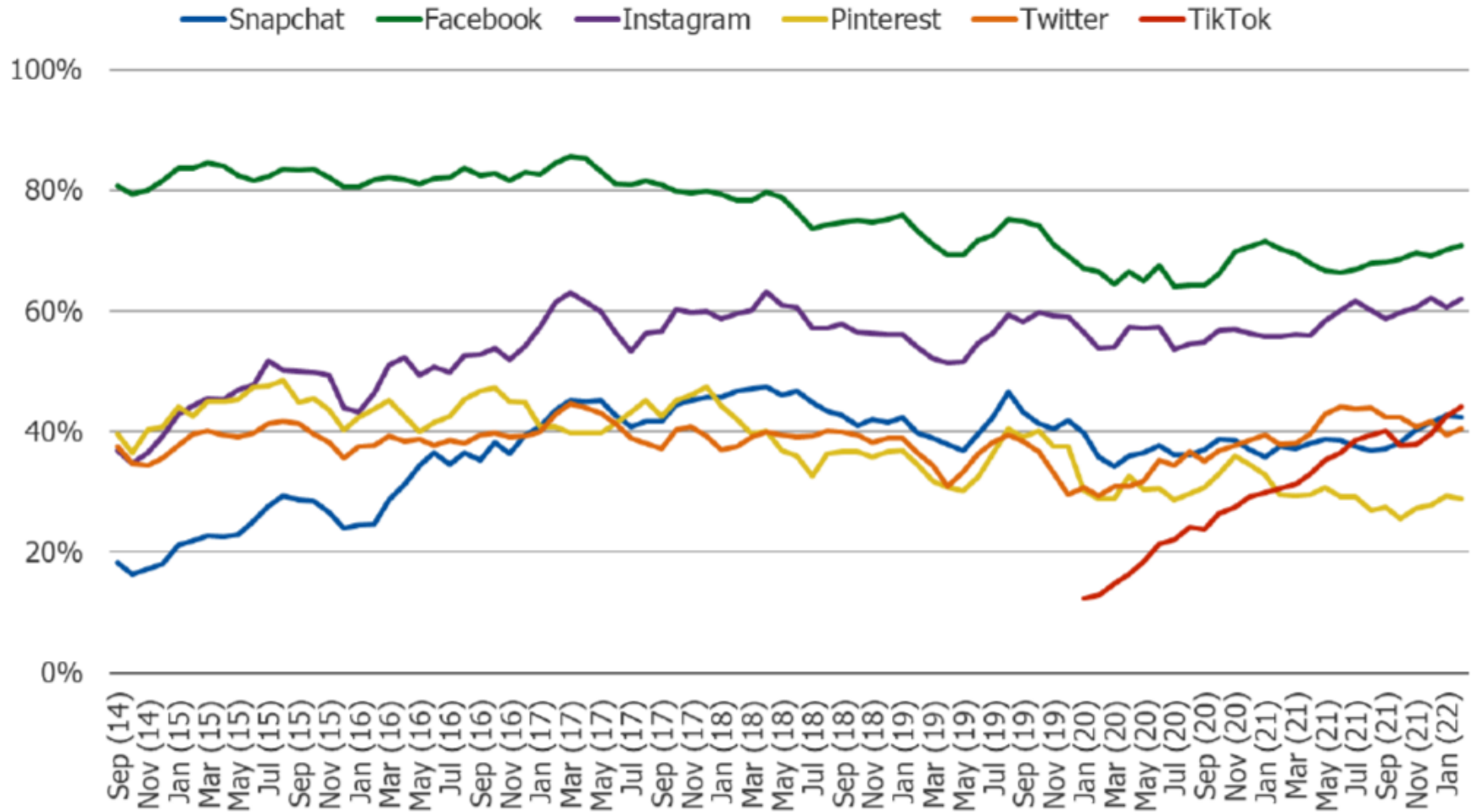


## % Account Holders (18-24)



## % Account Holders (25-34)

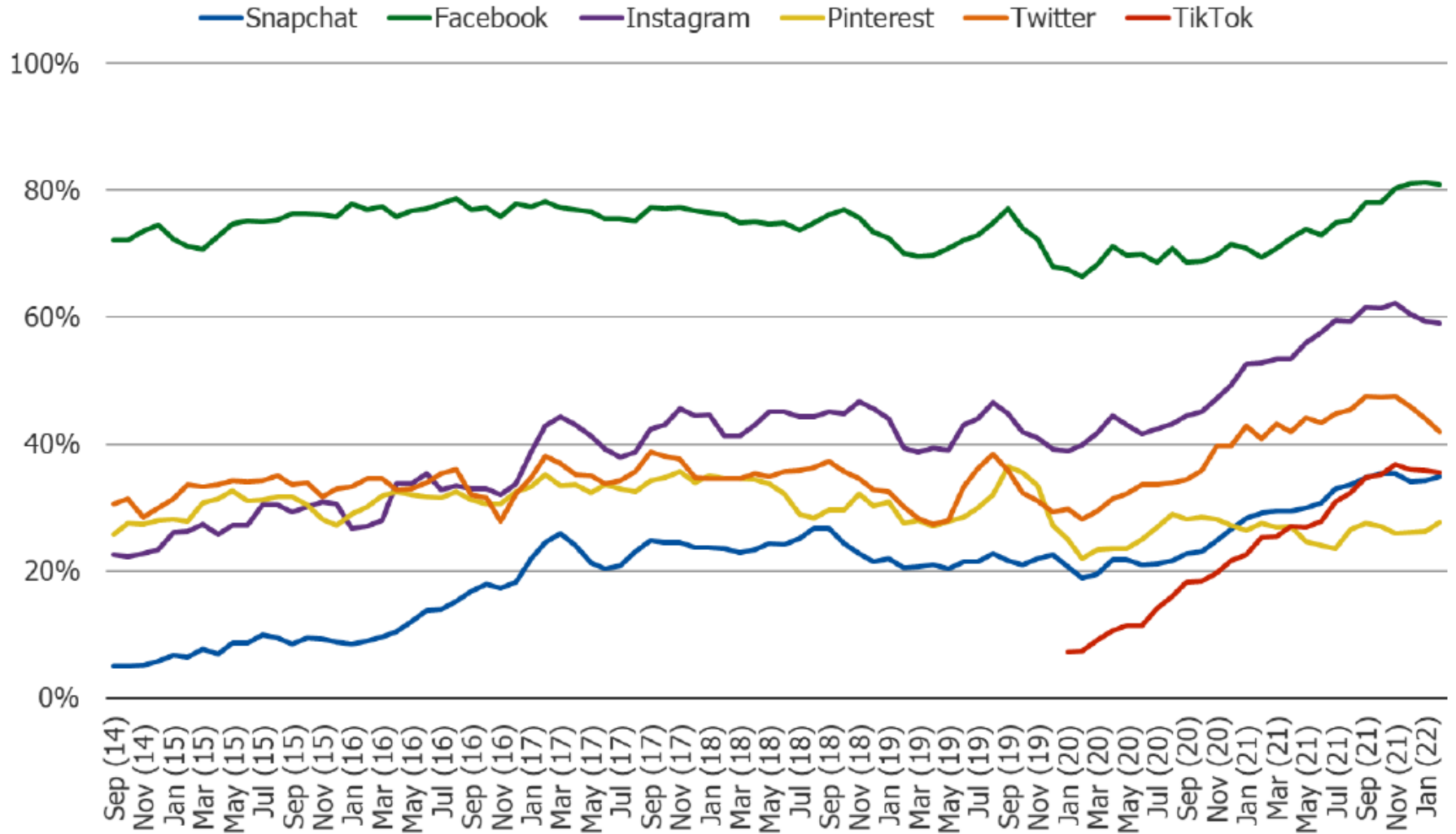
Posed to all respondents | Three Month Moving Average, 4500 US Consumers Balanced to Census Per Data Point



# Bespoke Surveys | Facebook vs. TikTok Webinar

## % Account Holders (35-44)

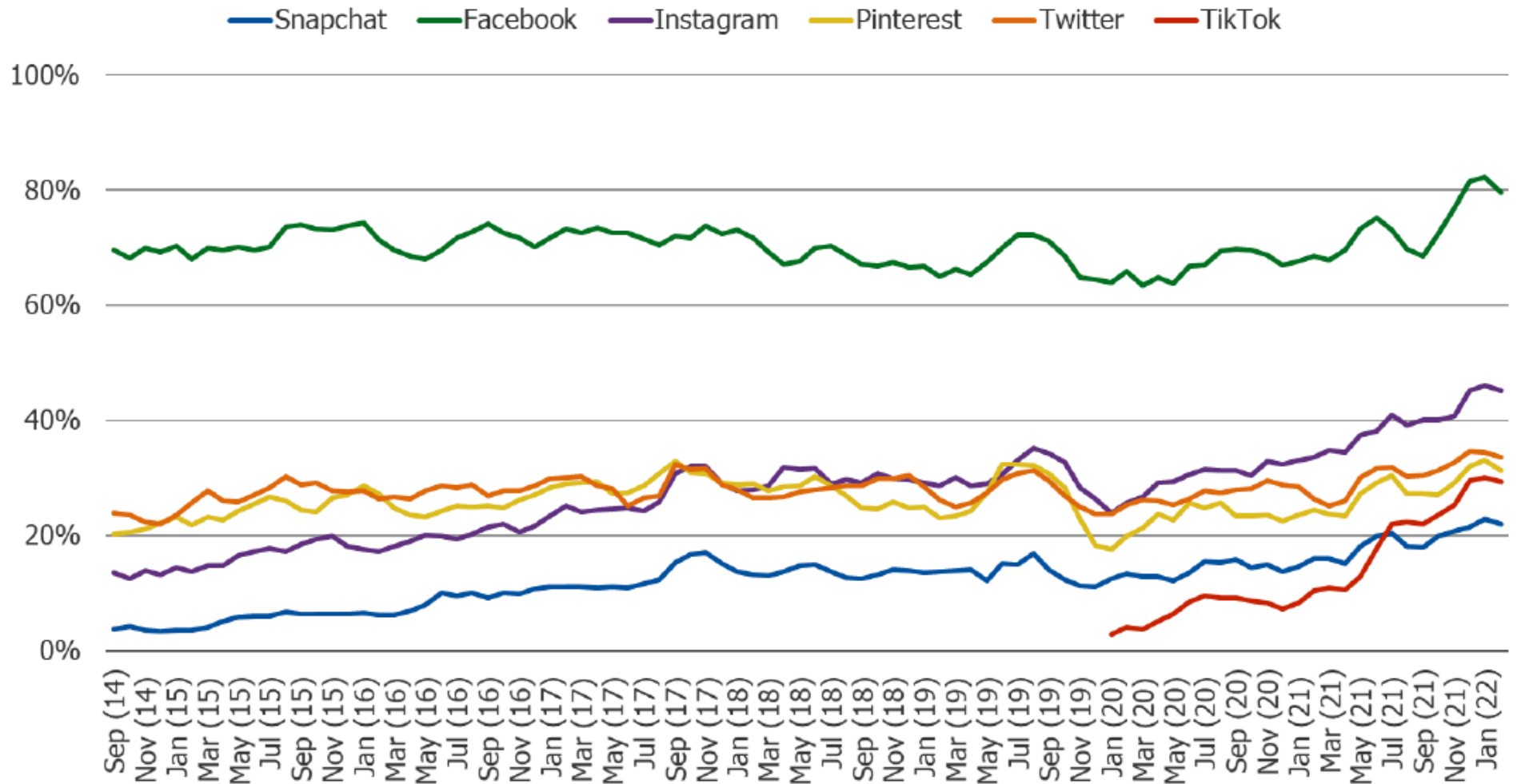
Posed to all respondents | Three Month Moving Average, 4500 US Consumers Balanced to Census Per Data Point



# Bespoke Surveys | Facebook vs. TikTok Webinar

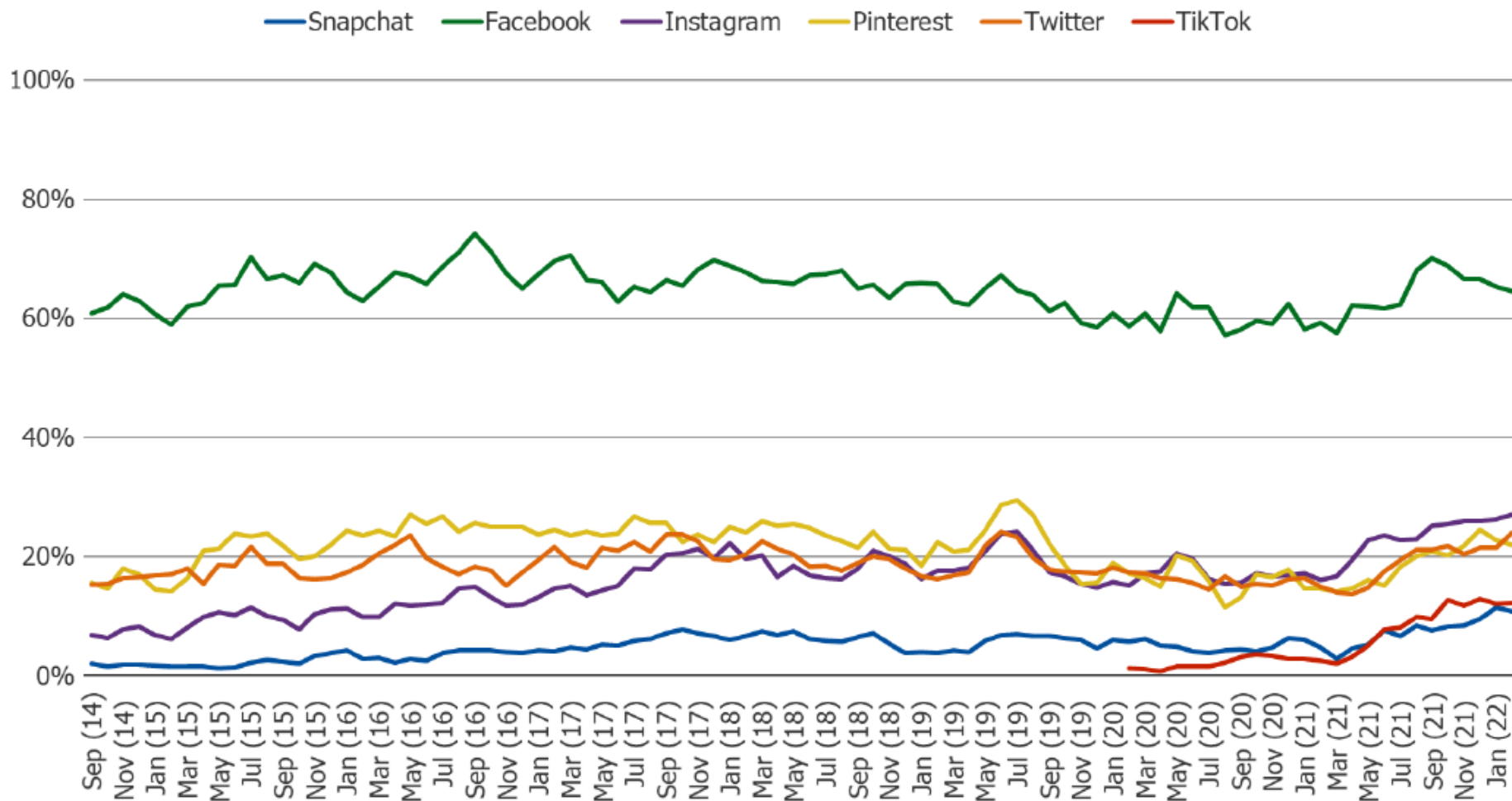
## % Account Holders (45-54)

Posed to all respondents | Three Month Moving Average, 4500 US Consumers Balanced to Census Per Data Point



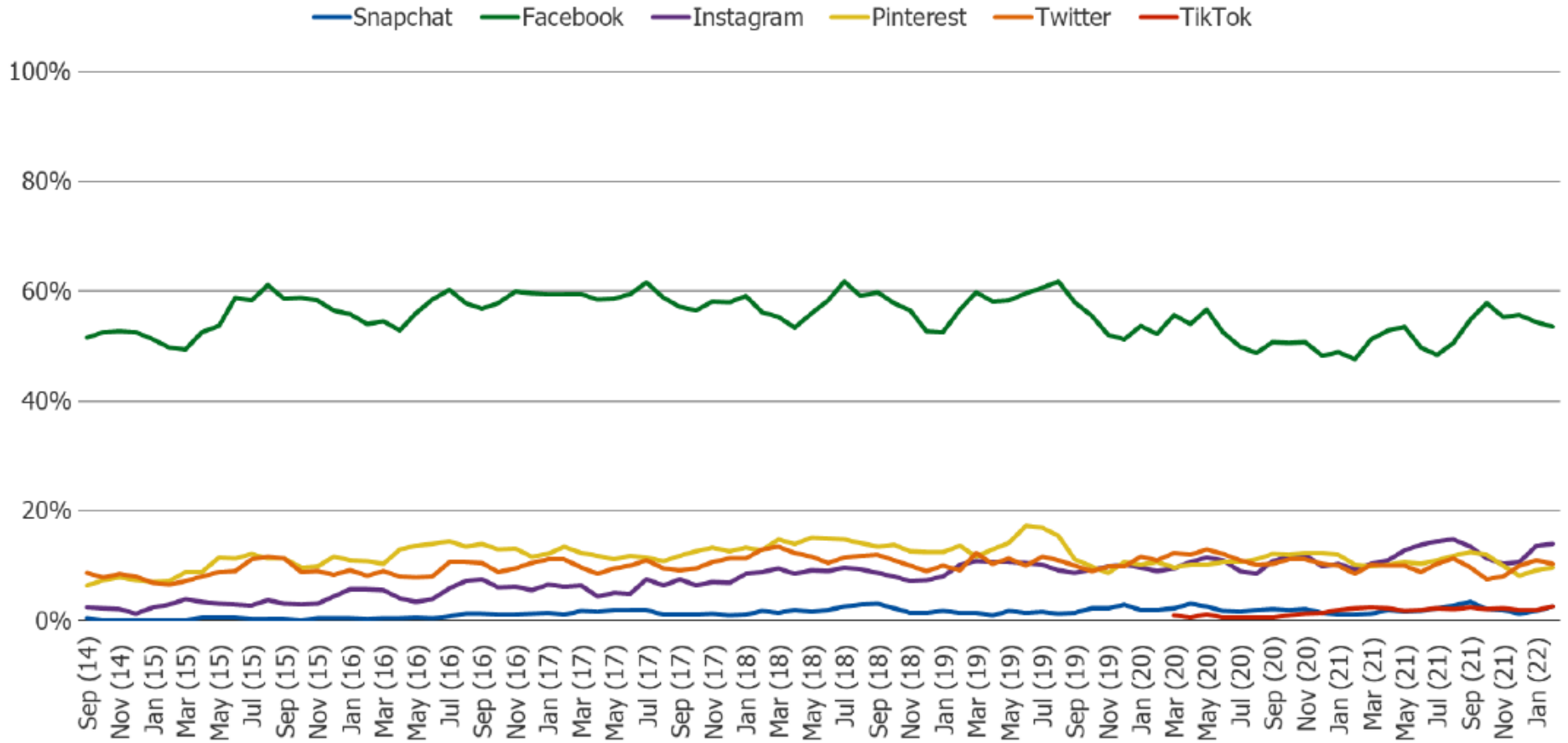
## % Account Holders (55-64)

Posed to all respondents | Three Month Moving Average, 4500 US Consumers Balanced to Census Per Data Point

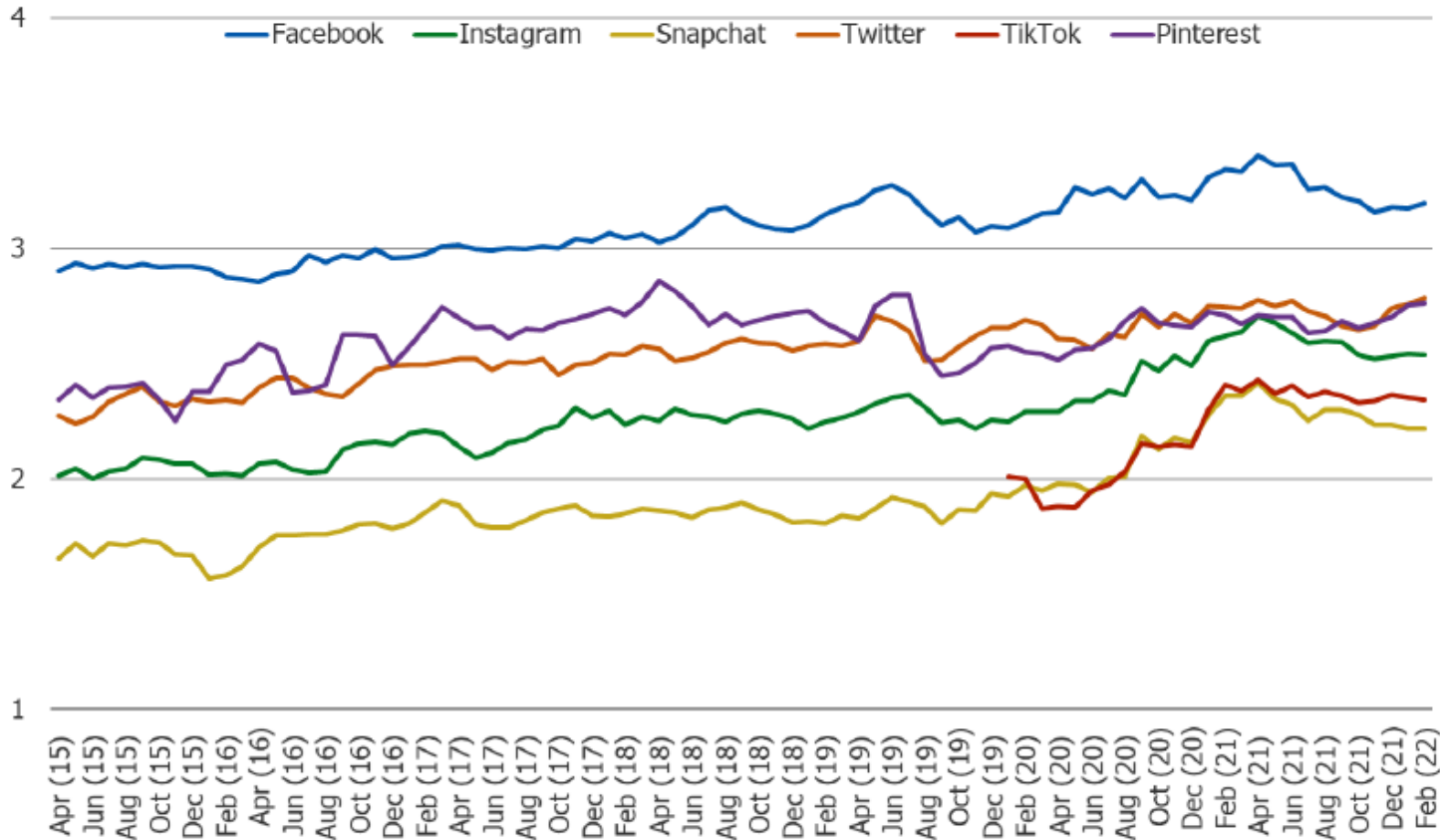


## % Account Holders (65+)

Posed to all respondents | Three Month Moving Average, 4500 US Consumers Balanced to Census Per Data Point



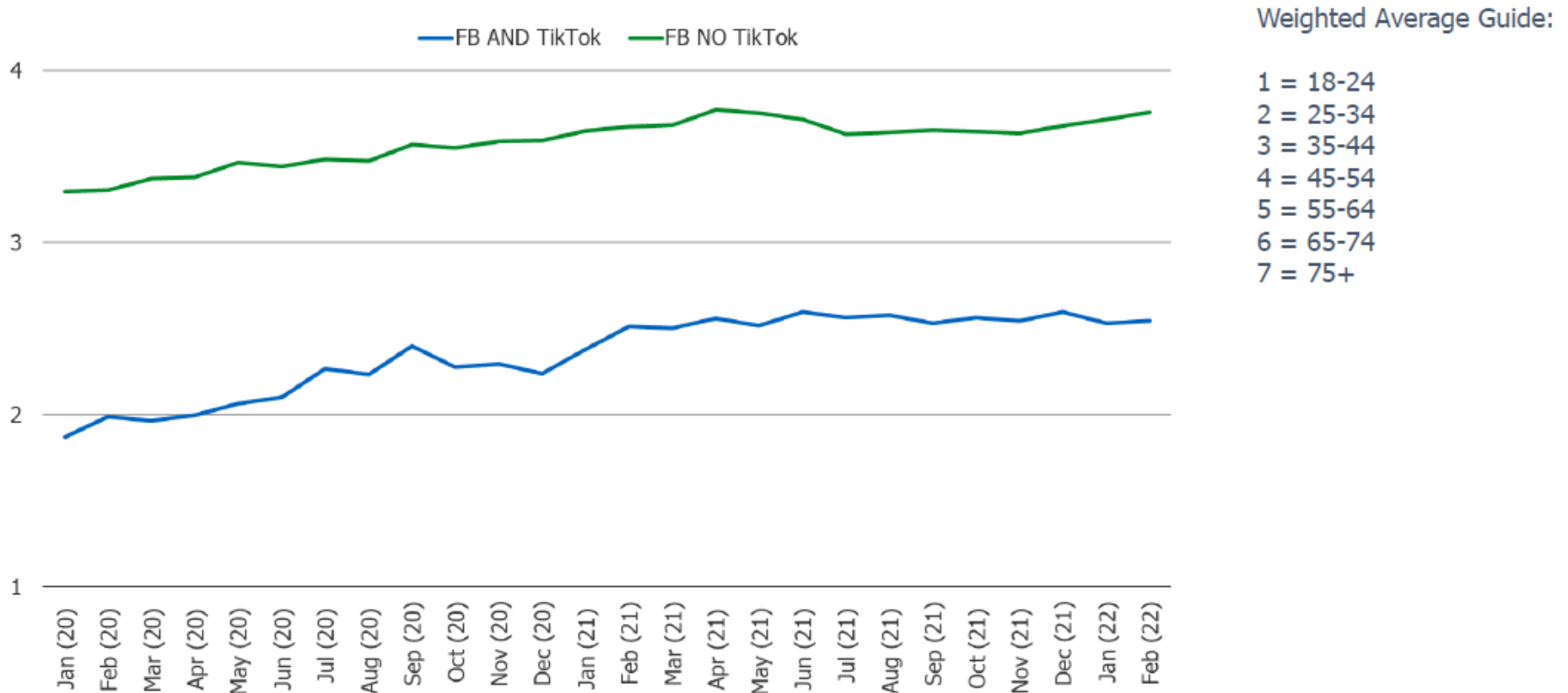
## Average Age of Respondents Who Visited The Day They Took Our Survey



Weighted Average Guide:

- 1 = 18-24
- 2 = 25-34
- 3 = 35-44
- 4 = 45-54
- 5 = 55-64
- 6 = 65-74
- 7 = 75+

## Average Age of Respondents Who Have An Account With Facebook AND TikTok vs. Facebook and NO TikTok



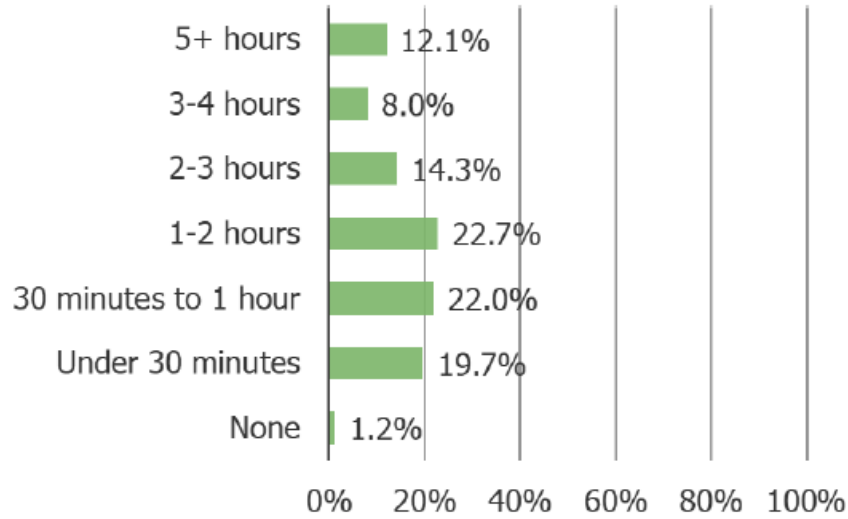


**Takeaway:** Facebook is competing with peers for TIME in the front of the funnel, BUT, the amount of time spent by 18-24 year old Facebook users isn't materially different than older Facebook users. IE – they are simply spending more time on social media overall. There is a bigger pie to divide.

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## How much time do you typically have for social media apps/platforms per day?

Posed to social media users (N = 977)

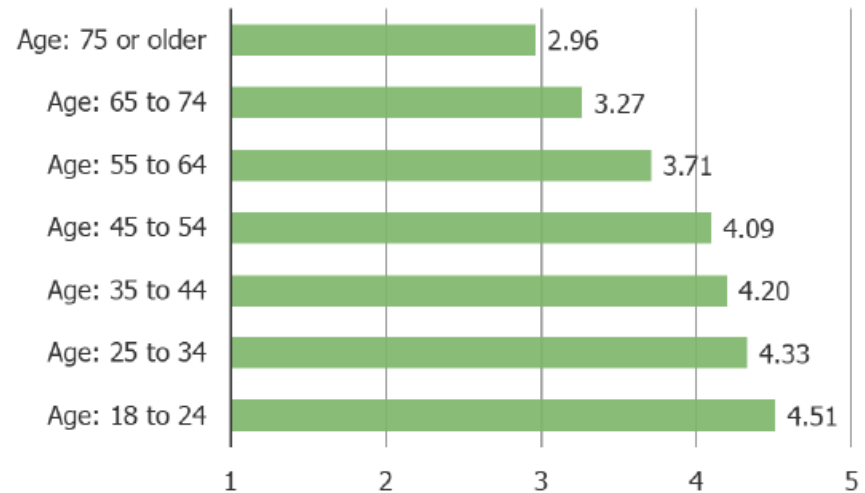


### Weighted Average Guide:

- 1 = None
- 2 = Under 30 Minutes
- 3 = 30 Minutes to 1 Hour
- 4 = 1-2 Hours
- 5 = 2-3 Hours
- 6 = 3-4 Hours
- 7 = 5+ Hours

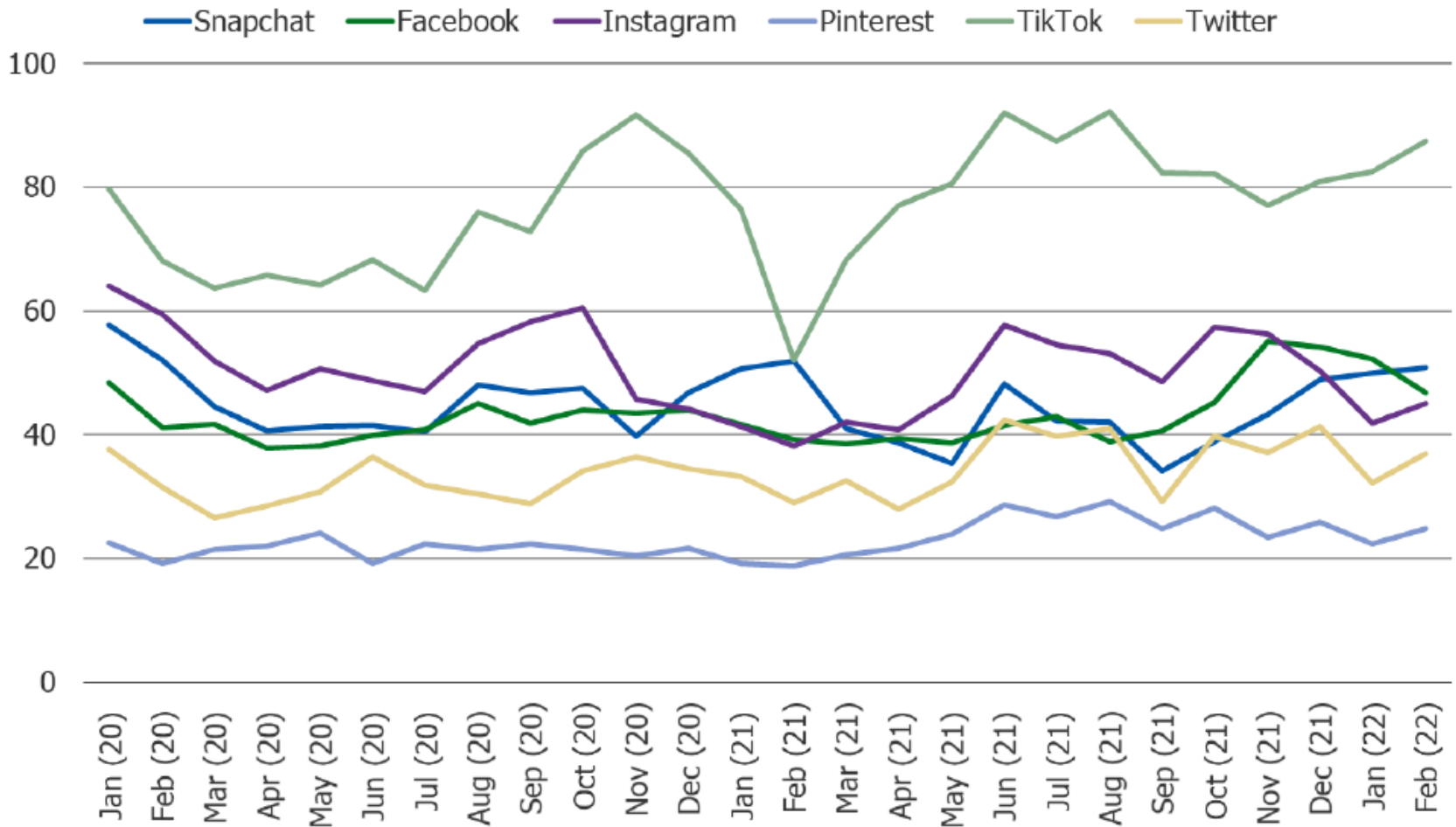


### Time For Social Media Per Day | By Age



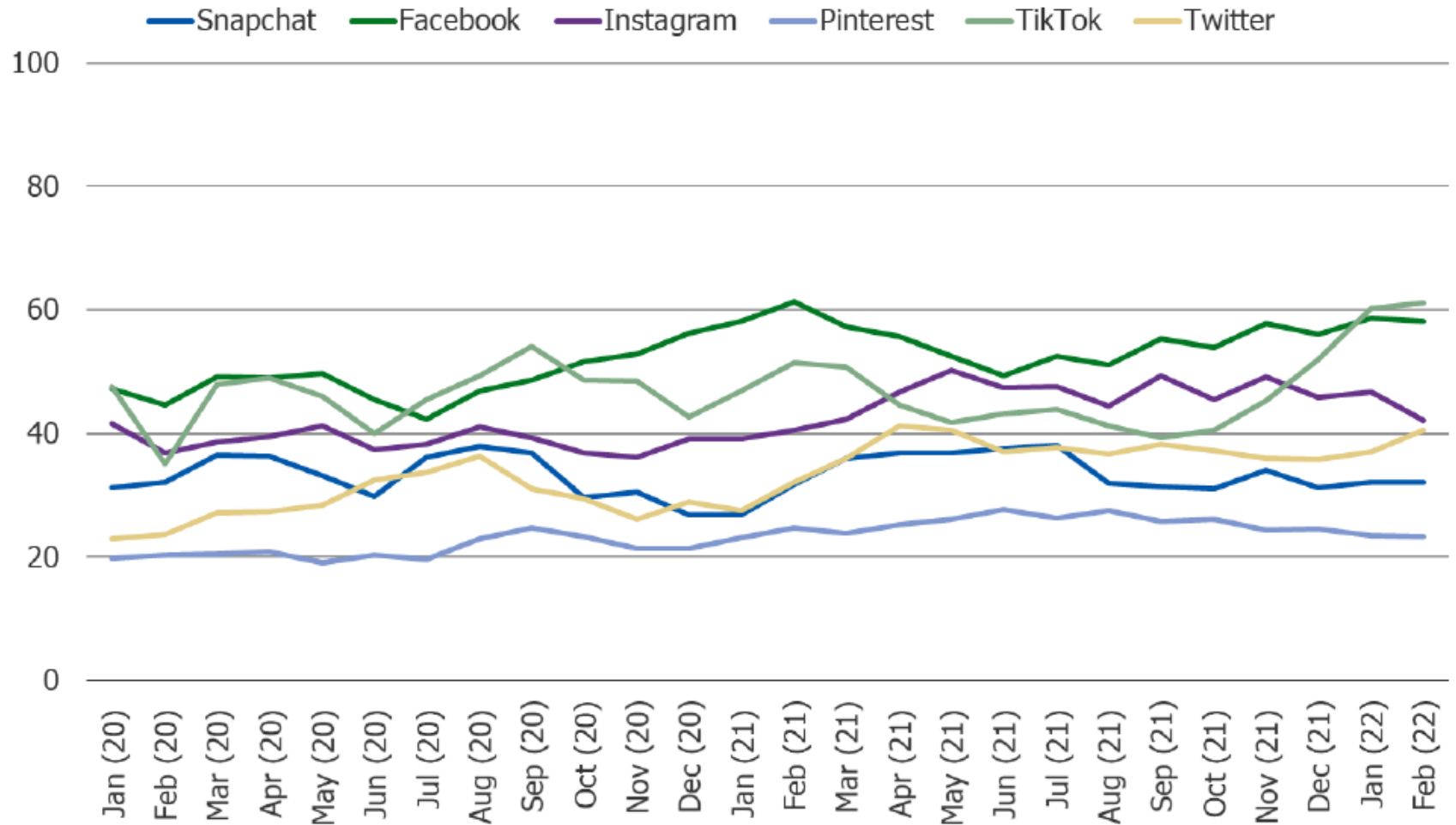
## (18-24 Year Olds) Self-Reported Minutes Per Day

Posed to respondents who said they visited each of the following the day they took our survey each month



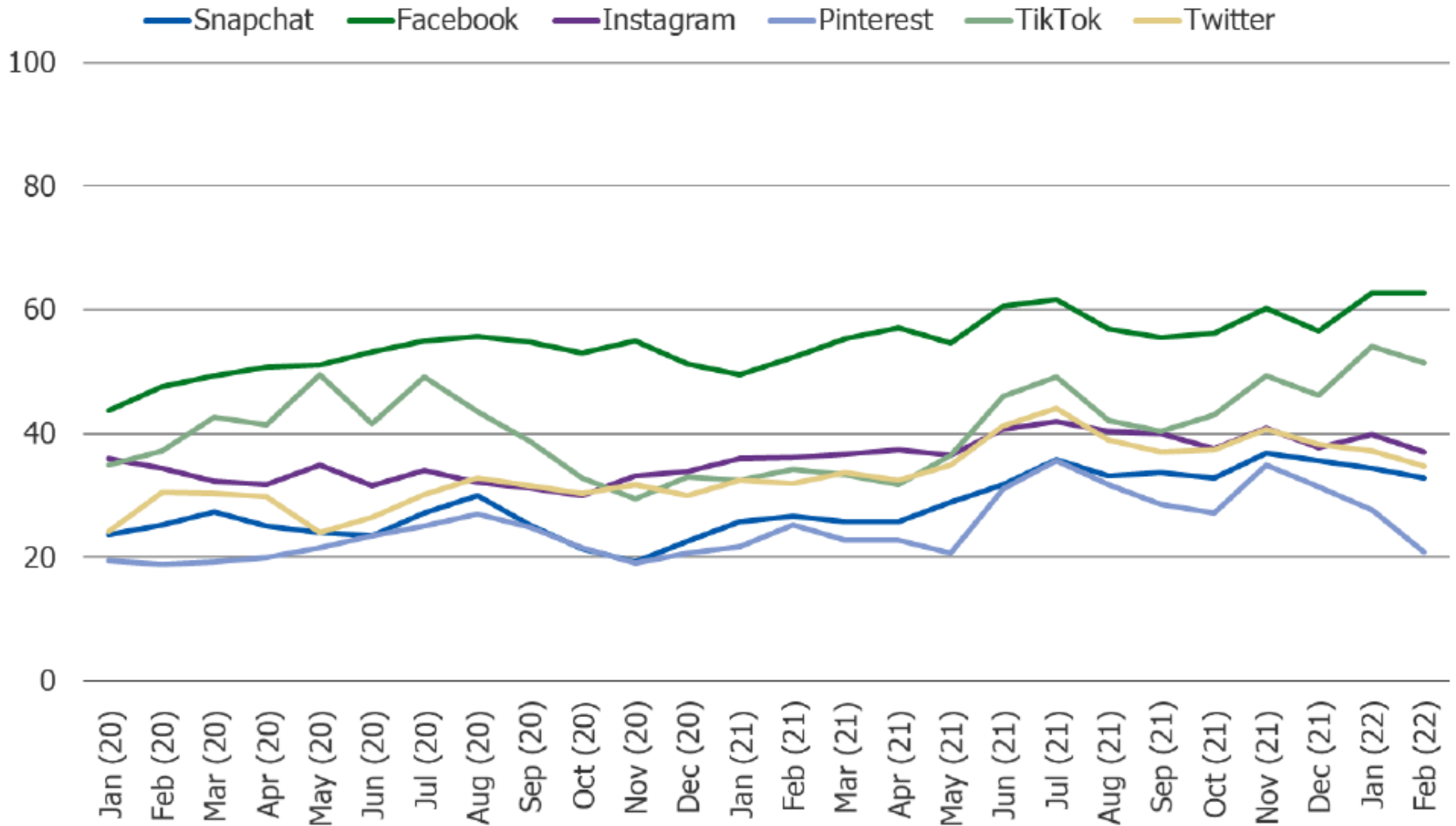
## (25-34 Year Olds) Self-Reported Minutes Per Day

Posed to respondents who said they visited each of the following the day they took our survey each month



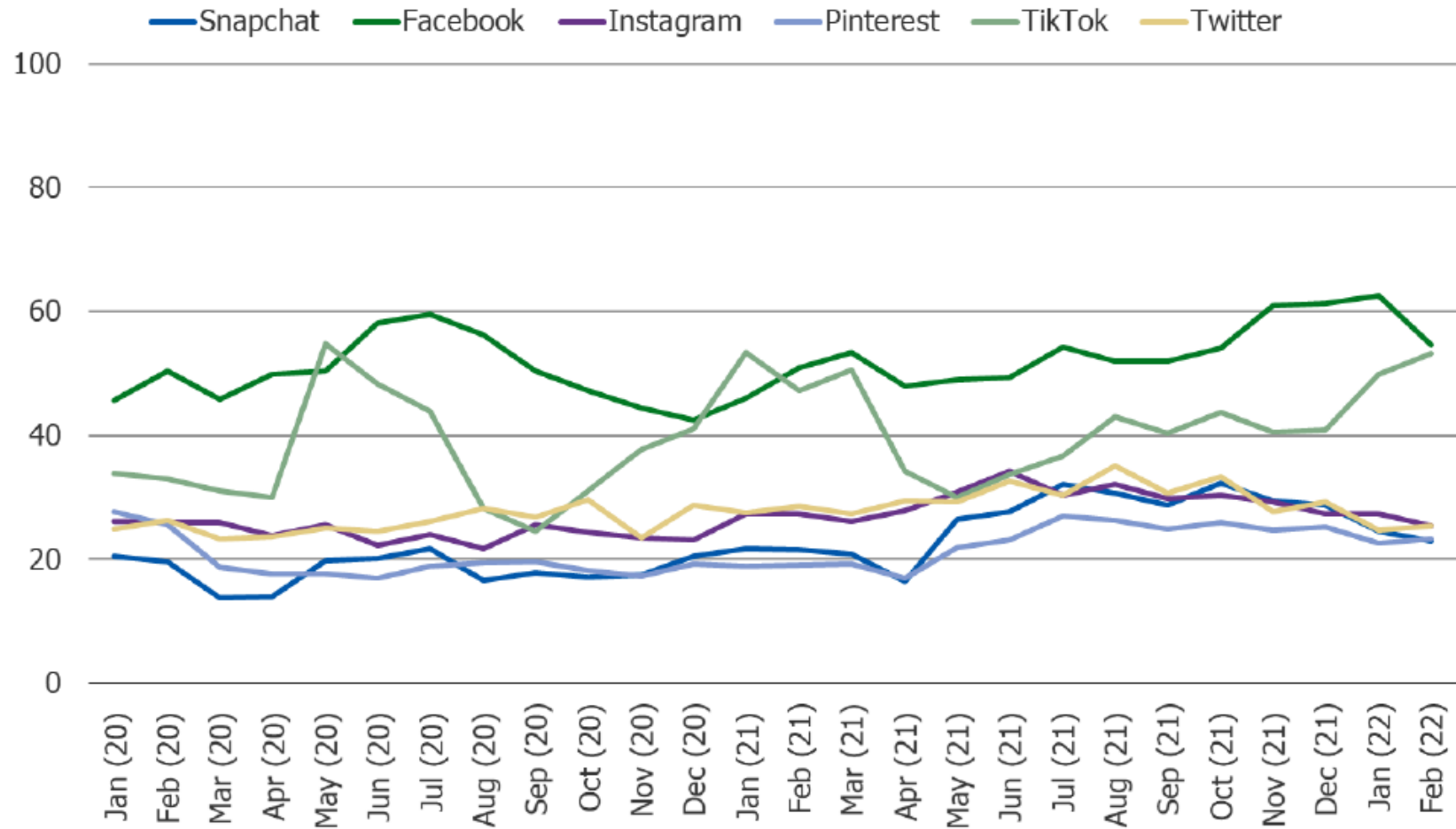
## (35-44 Year Olds) Self-Reported Minutes Per Day

Posed to respondents who said they visited each of the following the day they took our survey each month



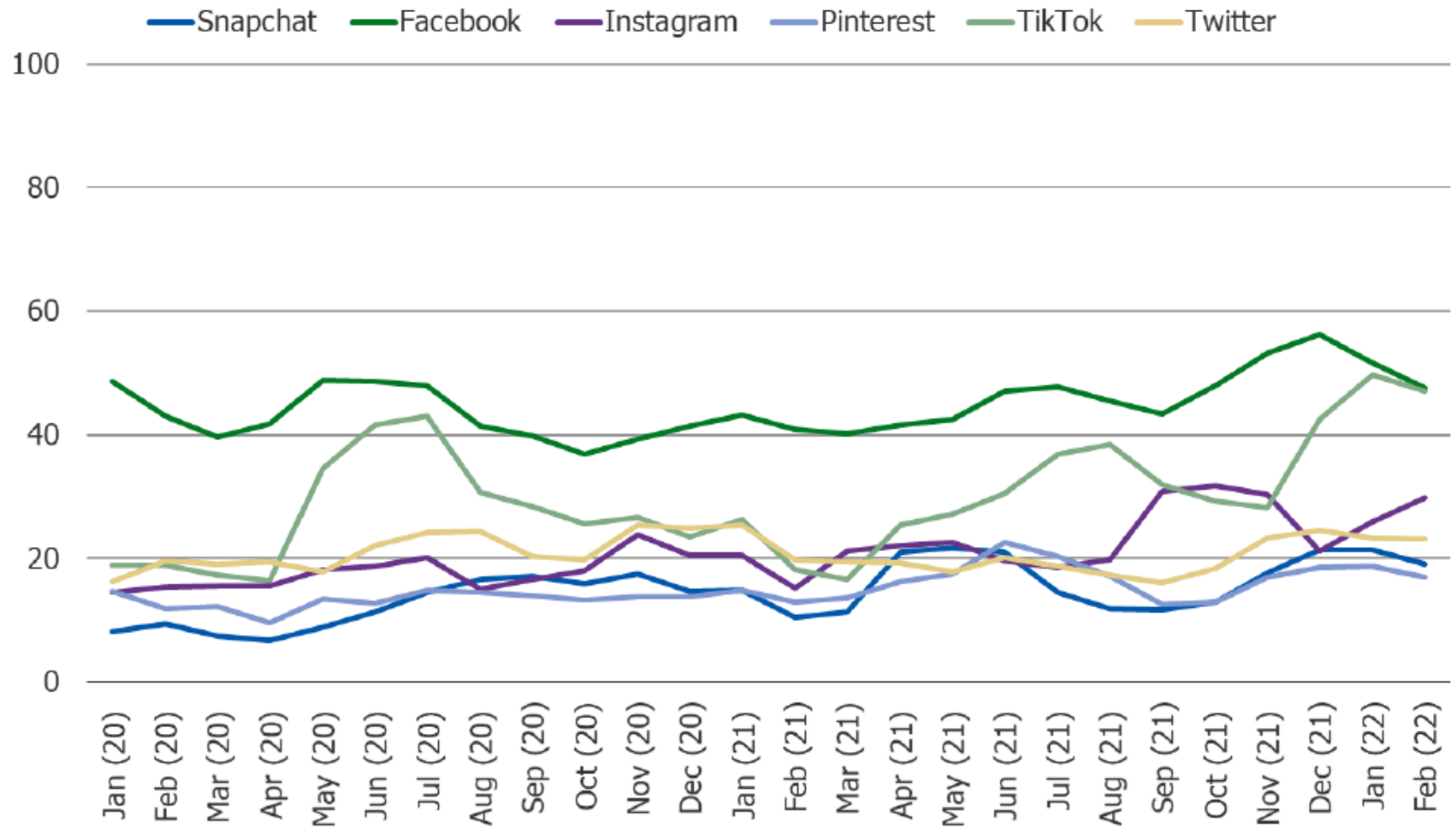
## (45-54 Year Olds) Self-Reported Minutes Per Day

Posed to respondents who said they visited each of the following the day they took our survey each month



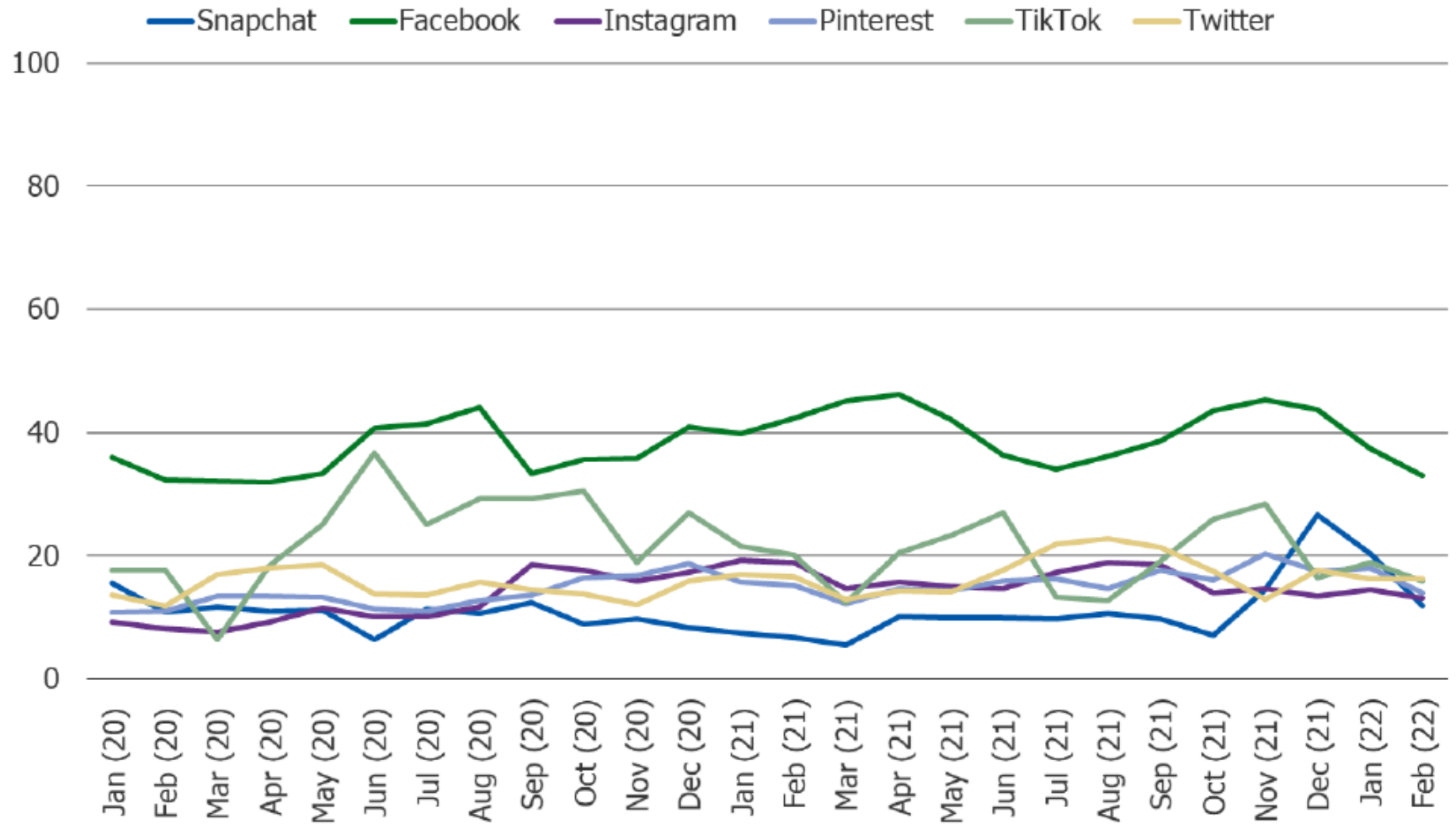
## (55-64 Year Olds) Self-Reported Minutes Per Day

Posed to respondents who said they visited each of the following the day they took our survey each month



## (65+ Year Olds) Self-Reported Minutes Per Day

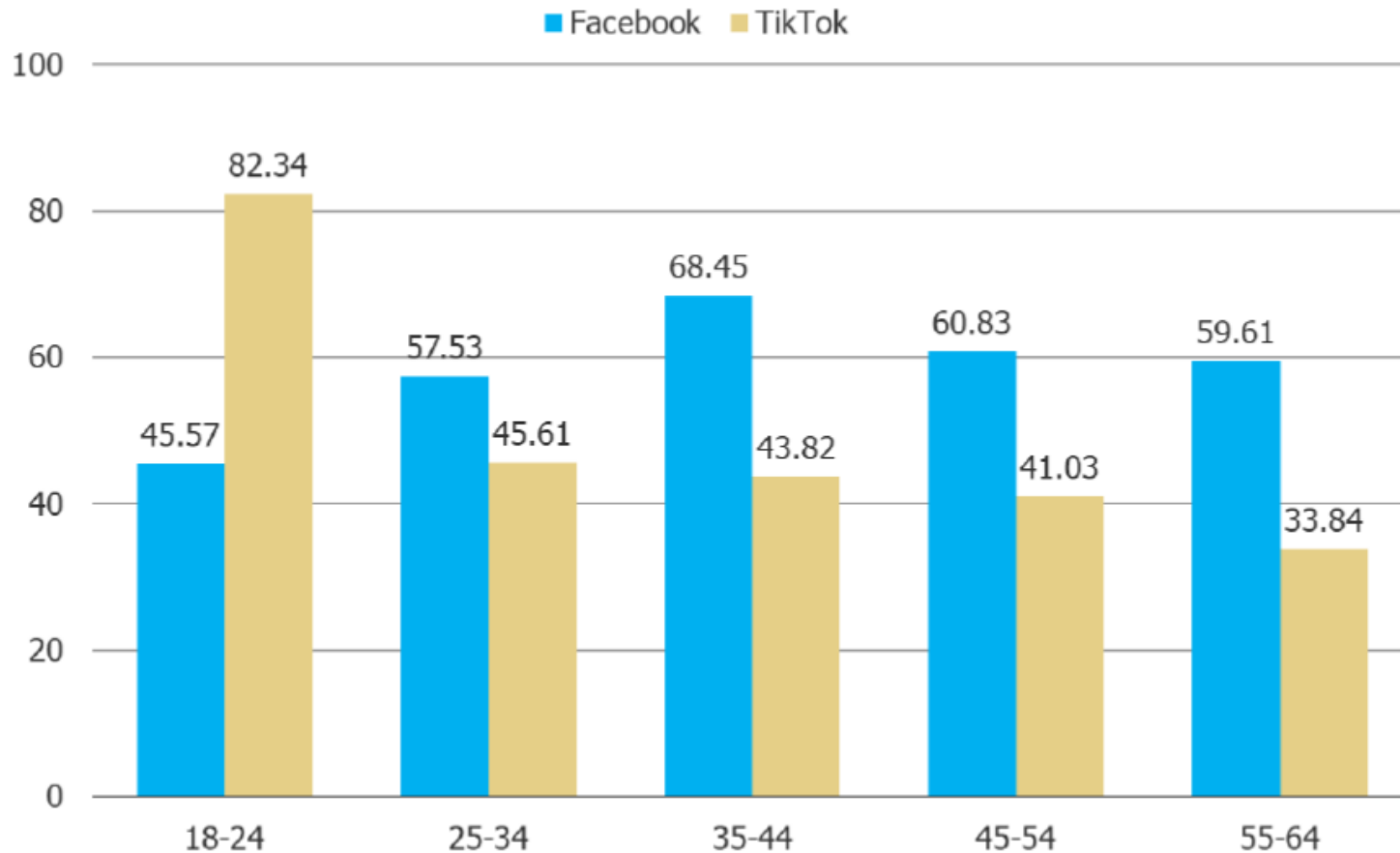
Posed to respondents who said they visited each of the following the day they took our survey each month





## Minutes Per Day, By Age | Respondents Who Have Accounts With Both Facebook AND TikTok

Posed to respondents who said they visited each of the following the day they took our survey each month

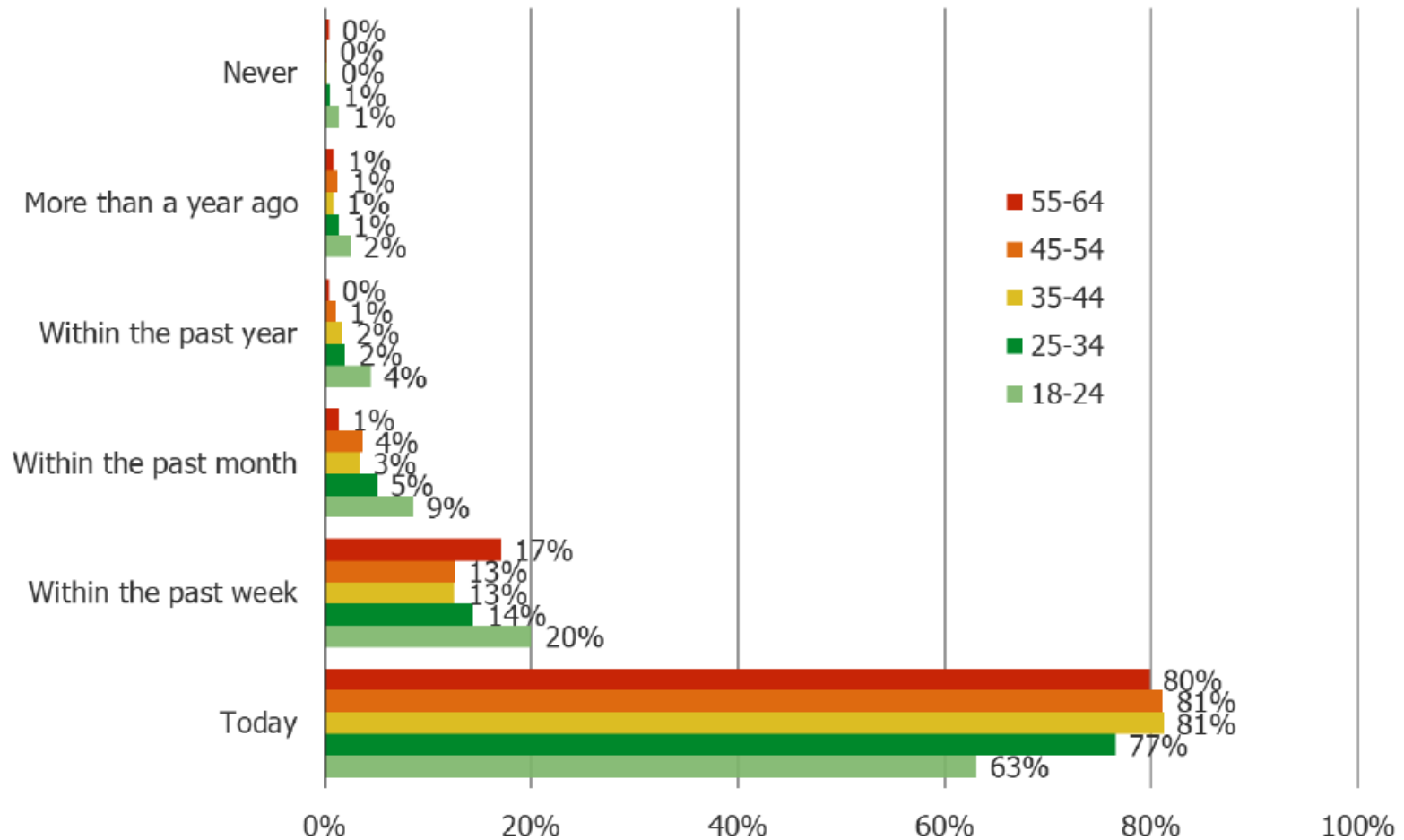


Combining all monthly data from January 2020 through present to achieve larger N sizes

IE – among 18-24 year olds who said they use both Facebook AND TikTok, they reported

## Facebook Visit Recency, By Age | Respondents Who Have Accounts With Both Facebook AND TikTok

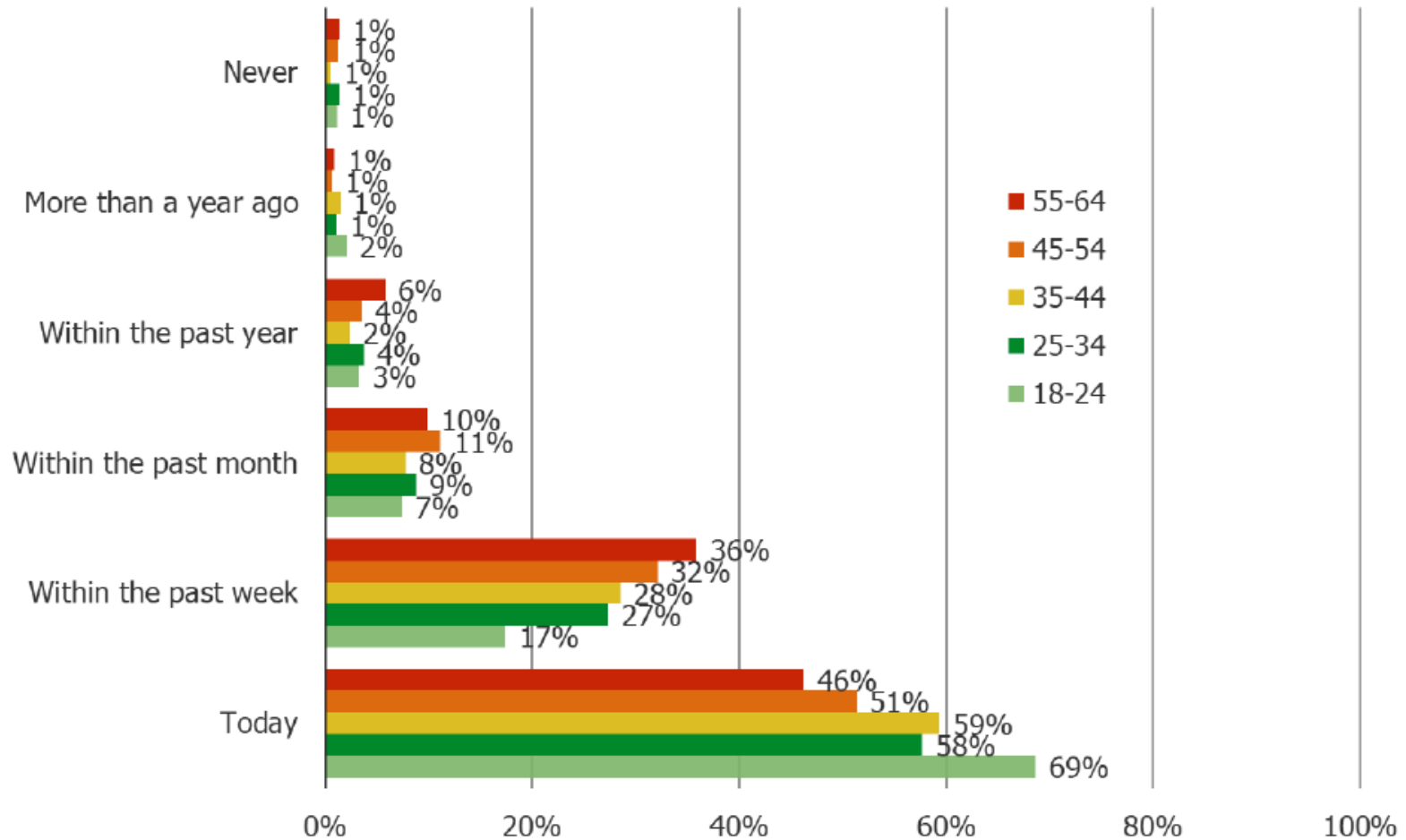
Posed to respondents who said they visited each of the following the day they took our survey each month



Combining all monthly data from January 2020 through present to achieve larger N sizes

## TikTok Visit Recency, By Age | Respondents Who Have Accounts With Both Facebook AND TikTok

Posed to respondents who said they visited each of the following the day they took our survey each month

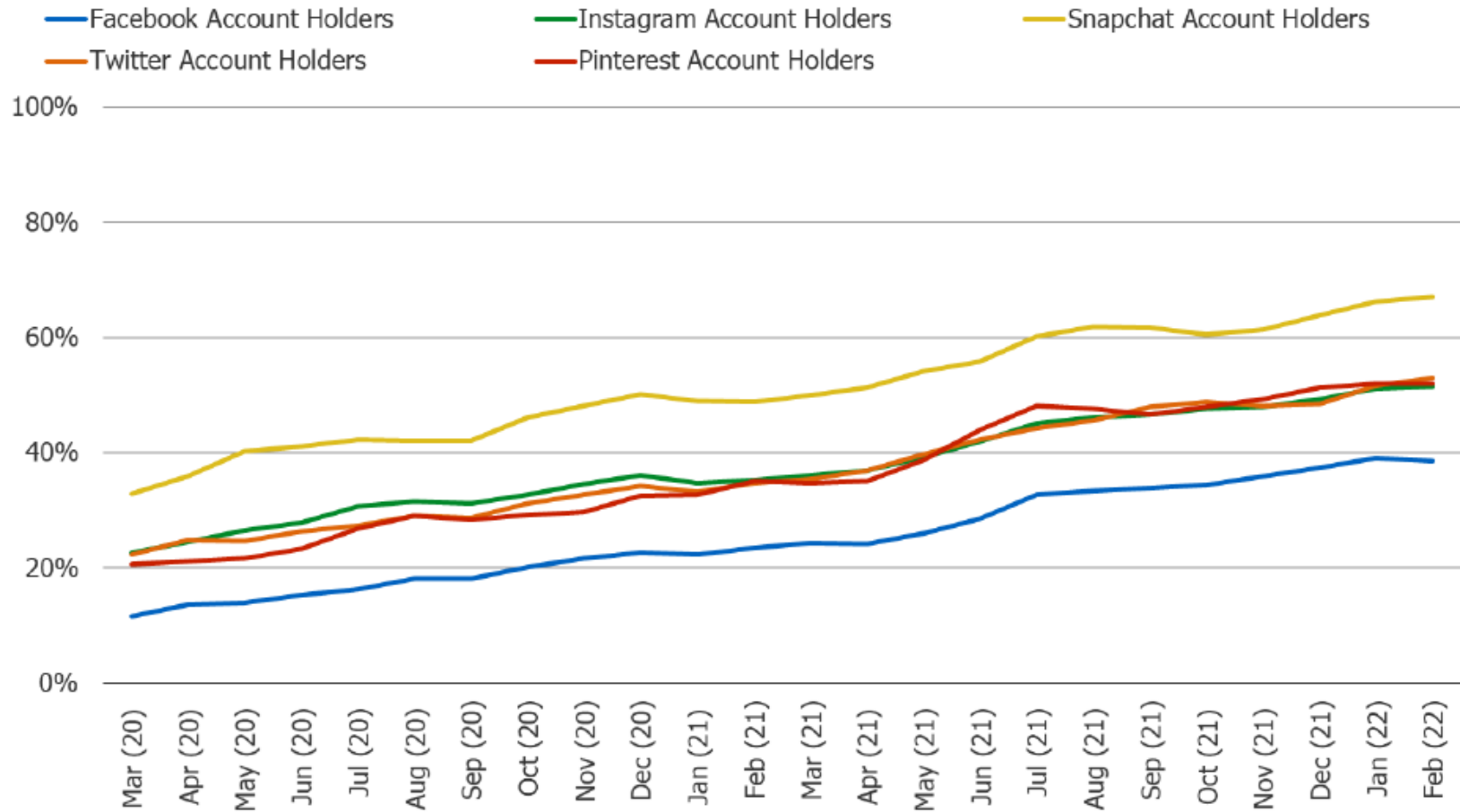


Combining all monthly data from January 2020 through present to achieve larger N sizes

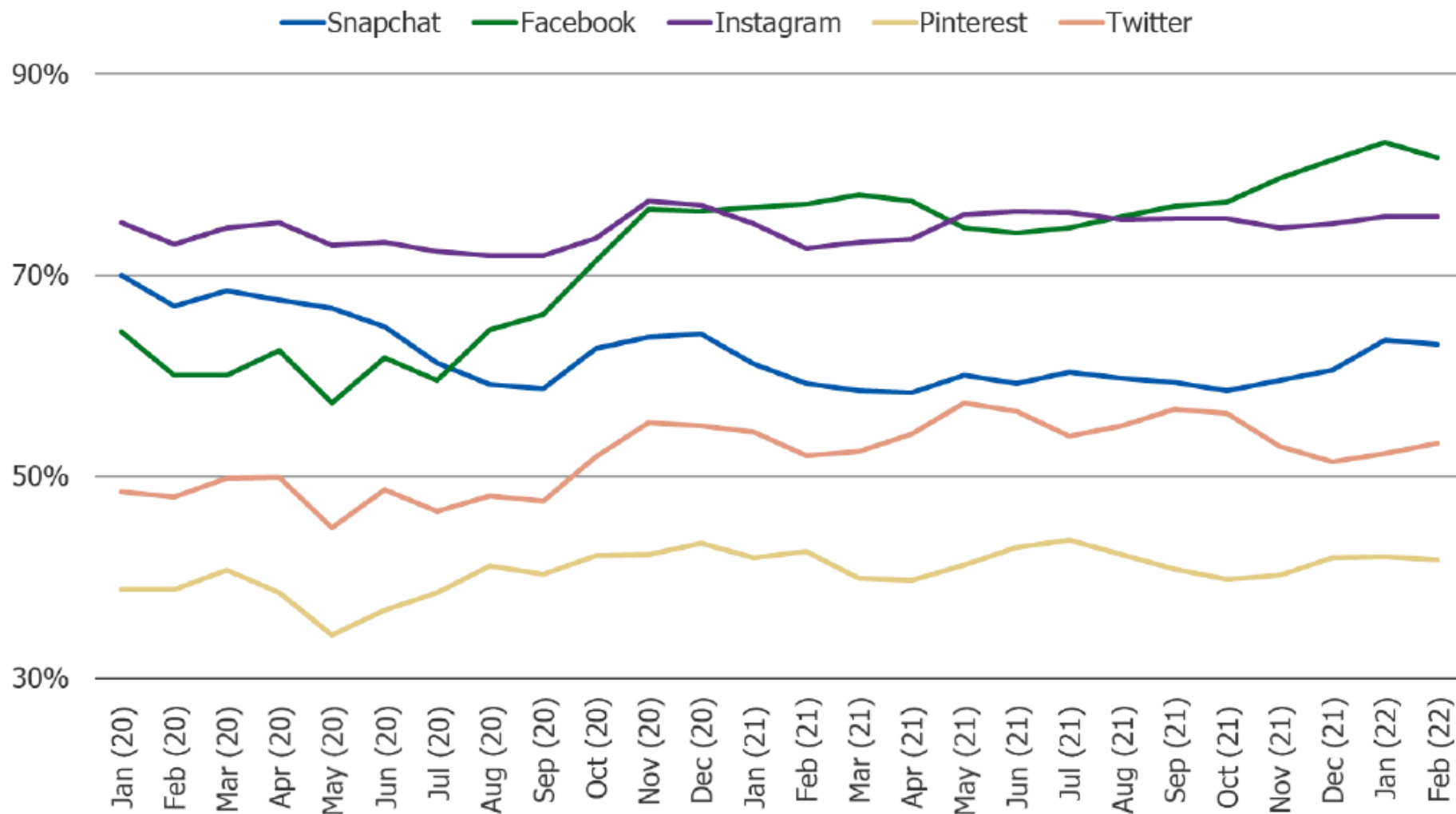
**Takeaway: TikTok IS growing into user bases. But two important points: 1) This is not unique to Facebook, and 2: TikTok users aren't ditching Facebook.**

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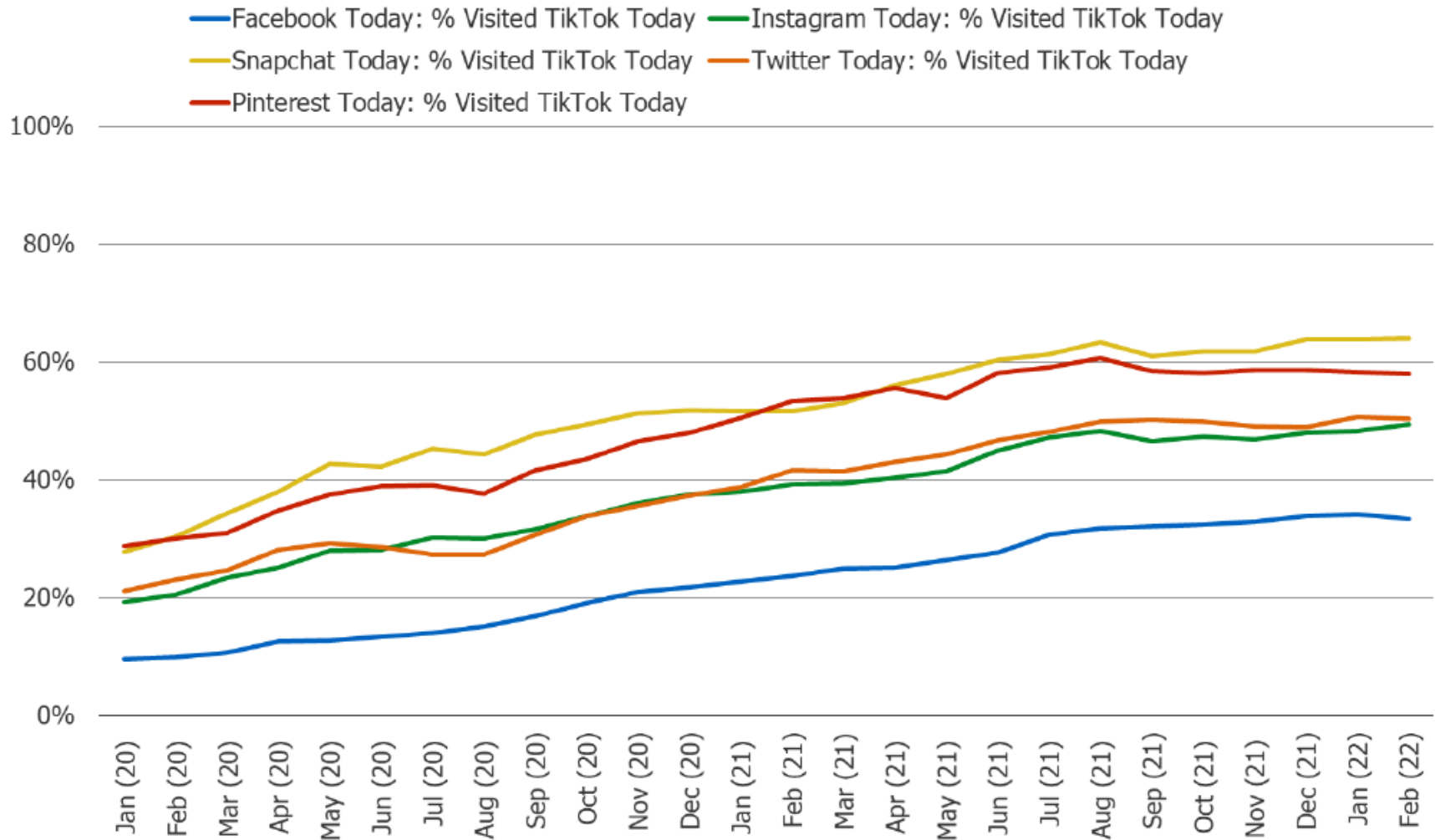
## Social Media Account Holders: % Also Has An Account With TikTok



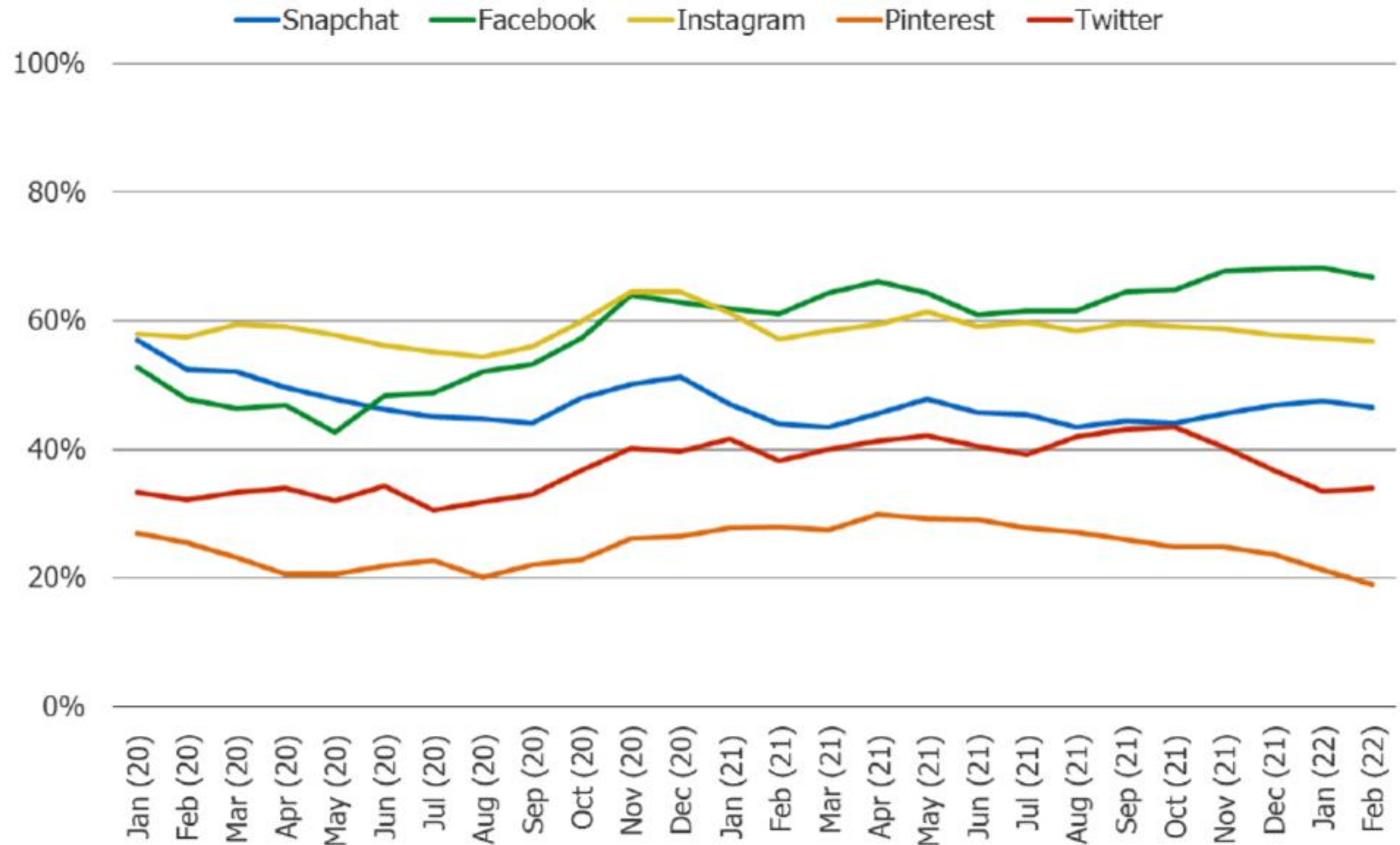
## TikTok Account Holders: Also Has Account With



## Respondents Who Visited Each of the Following The Day They Took Our Survey: % Who Also Visited TikTok



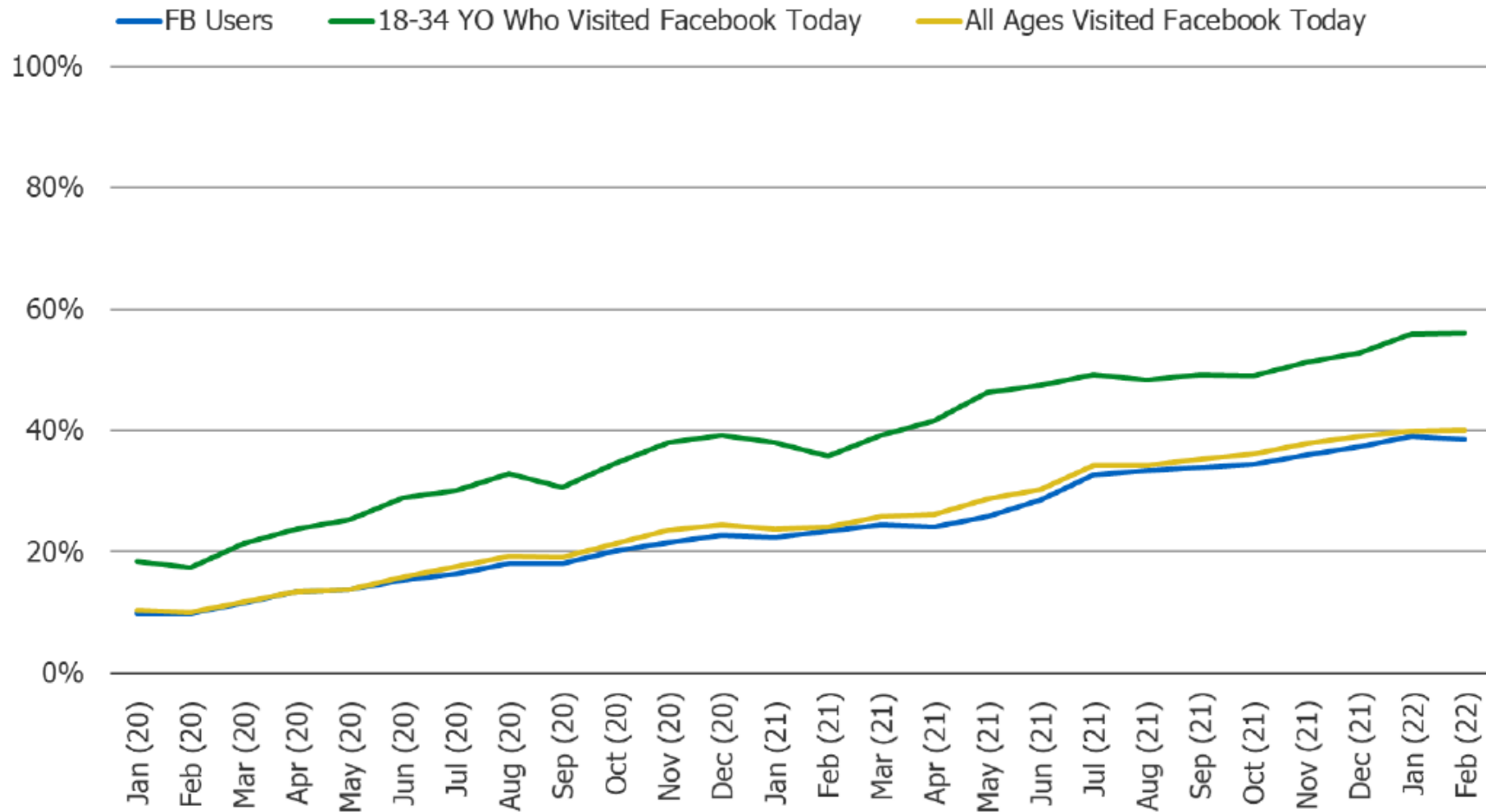
## TikTok Visited That Day: Also Visited That Day





## FB Account Holders / Visited FB That Day: % Has an Account with TikTok

Posed to Facebook Account Holders and Respondents Who Visited Facebook The Day They Took Our survey



**Takeaway:** When asked directly, users of each platform who also use TikTok tell us that TikTok doesn't impact their usage.

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## Bespoke Surveys | Facebook vs. TikTok Webinar

Does TikTok impact your usage of the following in any way? How? (Fill-in)

Posed to all respondents. (N=7056)

Facebook

**NOIMPACT**

Instagram

**NOIMPACT**

Youtube

**NOIMPACT**

Pinterest

**NOIMPACT**

Twitter

**NOIMPACT**

Snapchat

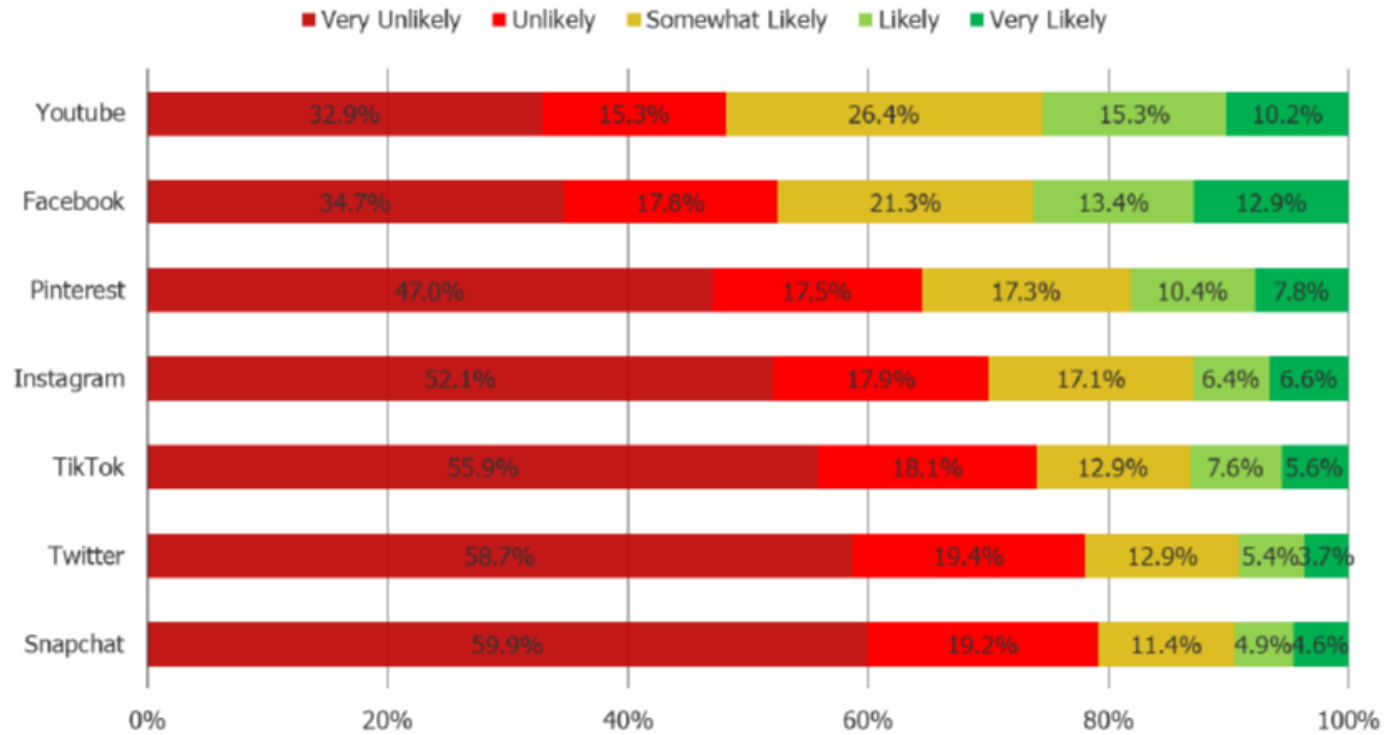
**NOIMPACT**

**Takeaway: Non-users are most likely to say they will use Facebook in the future, even among 18-34 year-olds.**

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## How likely are you to use this platform in the future?

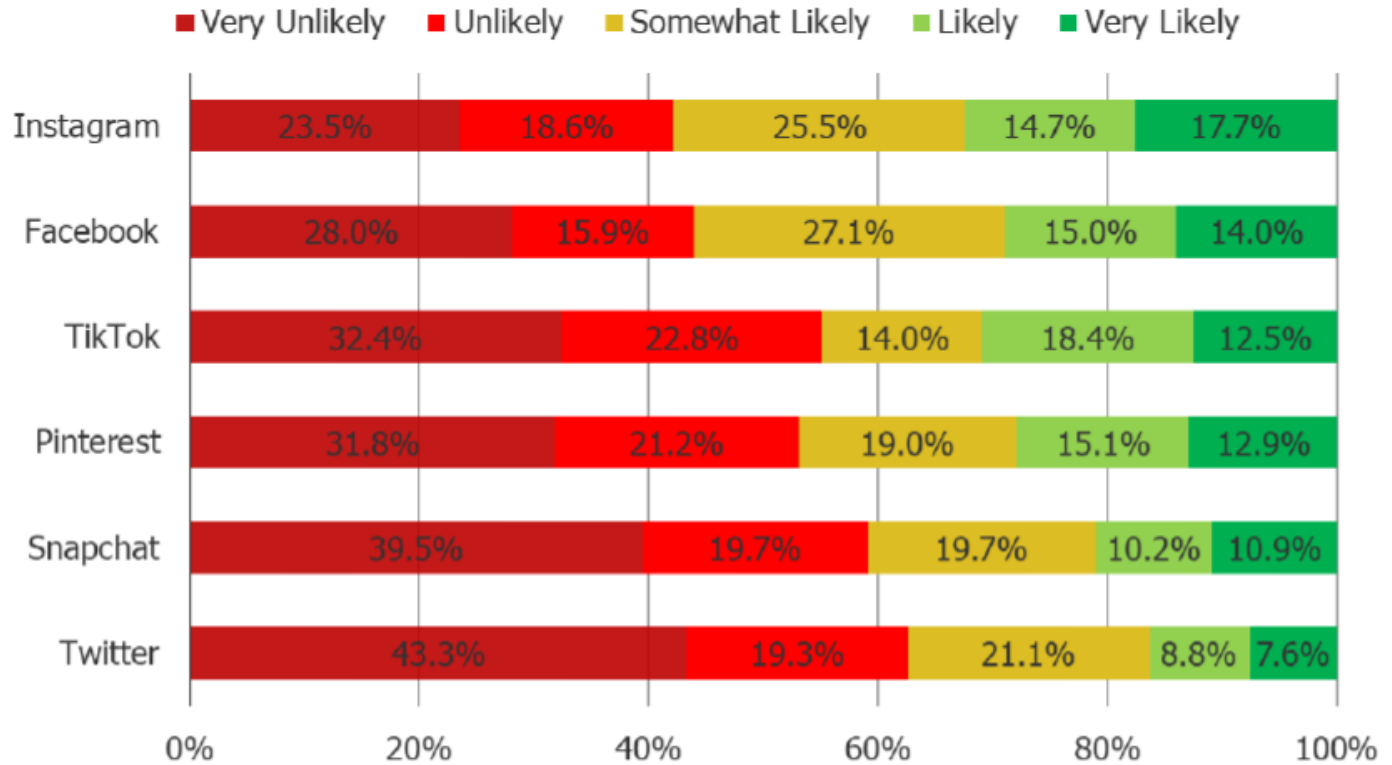
Posed to respondents who do not currently use each of the following.



	N =
Facebook	202
Instagram	457
TikTok	607
Snapchat	651
Twitter	615
Pinterest	566
Youtube	216

## How likely are you to use this platform in the future? | 18-34 Year-Olds

Posed to respondents who do not currently use each of the following.



	N =
Twitter	171
Snapchat	147
Pinteres	179
TikTok	136
Facebook	107
Instagram	102

**Takeaway:** Respondents use Facebook, TikTok, and other social platforms for different things. Facebook is used for “Friends” and has a strong lead when it comes to this use case.

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## What do you use this platform for?

Posed to social media users have used each of the following:

Facebook



Instagram



Youtube



TikTok



Twitter



Snapchat



Pinterest

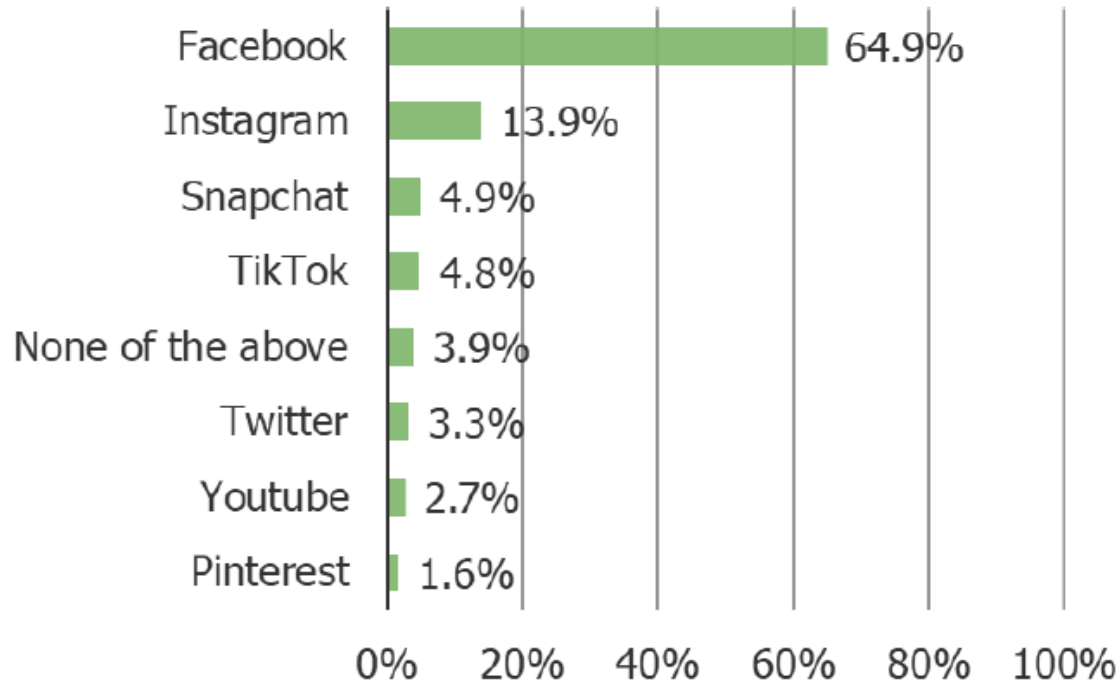


	N =
Facebook	923
Instagram	680
TikTok	526
Snapchat	521
Twitter	587
Pinterest	642
Youtube	884



## Which app/platform has the most amount of your friends on it?

Posed to social media users (N = 977)



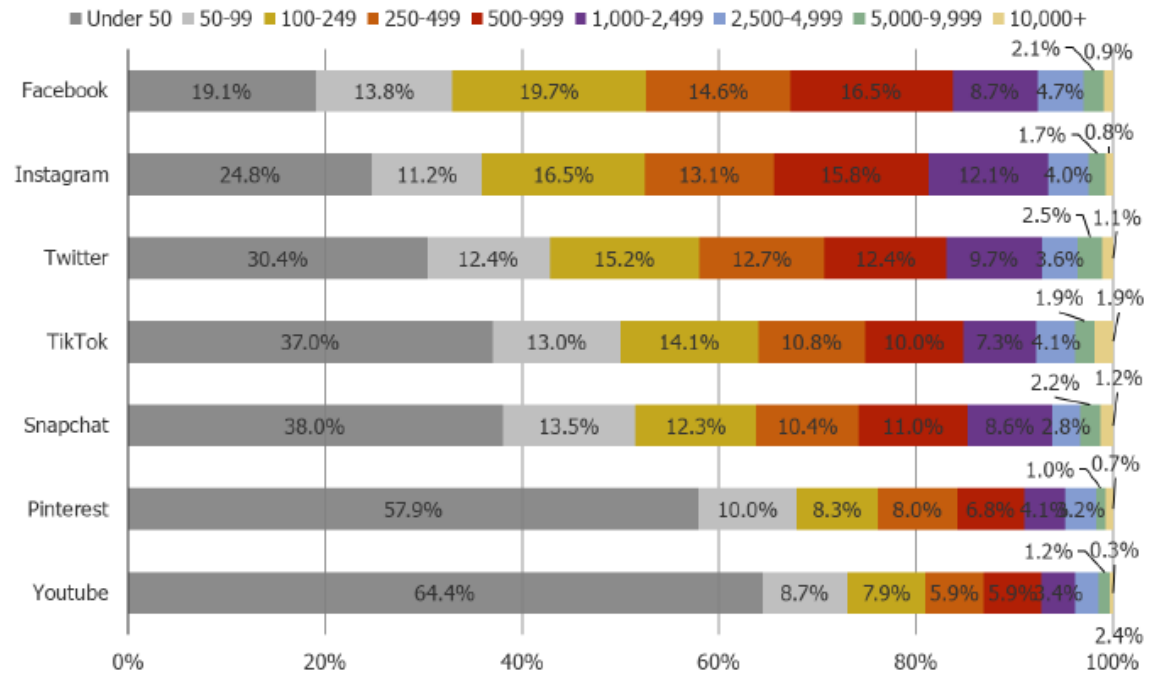
## Age Cuts:

	None	Facebook	Instagram	Snapchat	TikTok	Twitter	Pinterest	Youtube	N =
Age: 18 to 24	3.0%	19.4%	32.8%	23.1%	14.2%	3.7%	1.5%	2.2%	134
Age: 25 to 34	1.7%	61.4%	23.3%	2.3%	5.1%	4.0%	0.0%	2.3%	176
Age: 35 to 44	1.1%	65.0%	15.9%	1.6%	5.5%	4.4%	3.3%	3.3%	183
Age: 45 to 54	6.3%	69.5%	6.3%	4.2%	3.7%	2.6%	3.2%	4.2%	190
Age: 55 to 64	6.6%	78.8%	4.6%	1.3%	1.3%	3.3%	1.3%	2.7%	151
Age: 65 to 74	5.6%	87.8%	3.3%	0.0%	0.0%	2.2%	0.0%	1.1%	90
Age: 75 or older	3.8%	96.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	53

## How many friends/connections/followers do you have on the following:

Posed to social media users currently use each of the following:

	N =
Youtube	761
Pinterest	411
Snapchat	326
TikTok	370
Twitter	362
Instagram	520
Facebook	775



## Age Cuts:

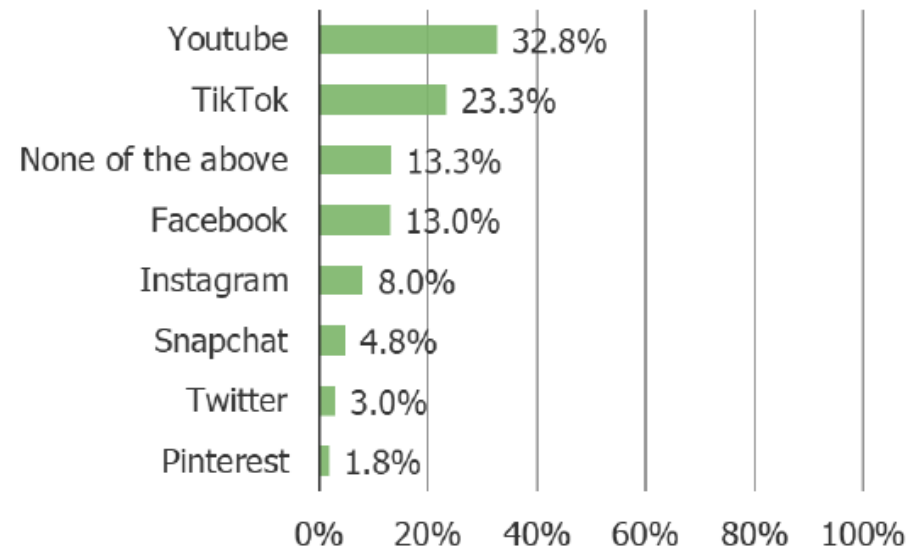
	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	3.83	4.41	3.54	2.97	3.07	2.23	2.09
Age: 25 to 34	4.5	4.31	3.43	3.42	4.04	3	2.93
Age: 35 to 44	4.16	3.79	2.9	3.12	3.81	2.97	2.53
Age: 45 to 54	3.56	2.85	2.94	2.83	2.96	2.3	1.81
Age: 55 to 64	2.68	2.04	1.36	1.5	1.83	1.26	1.34
Age: 65 to 74	2.59	1.8	2	1	2.95	1.27	1.39
Age: 75 or older	2.51	1.64	1	1.33	1.29	1.47	1.18

**Takeaway: TikTok is viewed as best for making videos and for entertainment/fun.**

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## Which app/platform is best for making videos?

Posed to social media users (N = 977)



## Age Cuts:

	None	Facebook	Instagram	Snapchat	TikTok	Twitter	Pinterest	Youtube	N =
Age: 18 to 24	1.5%	6.7%	9.7%	13.4%	33.6%	6.0%	3.0%	26.1%	134
Age: 25 to 34	5.7%	12.5%	15.9%	5.1%	30.7%	4.0%	2.3%	23.9%	176
Age: 35 to 44	6.6%	14.2%	10.9%	6.0%	25.1%	4.4%	3.8%	29.0%	183
Age: 45 to 54	12.1%	15.8%	3.7%	3.7%	25.3%	1.6%	1.6%	36.3%	190
Age: 55 to 64	19.2%	12.6%	3.3%	0.7%	12.6%	1.3%	0.0%	50.3%	151
Age: 65 to 74	34.4%	14.4%	4.4%	0.0%	13.3%	1.1%	0.0%	32.2%	90
Age: 75 or older	43.4%	15.1%	1.9%	1.9%	7.6%	0.0%	0.0%	30.2%	53

# Bespoke Surveys | Facebook vs. TikTok Webinar

If you had to use one word to describe each of the following, what would it be?

Posed to social media users have used each of the following:

Facebook



Instagram



Youtube



TikTok



Twitter



Snapchat



Pinterest



	N =
Facebook	923
Instagram	680
TikTok	526
Snapchat	521
Twitter	587
Pinterest	642
Youtube	884

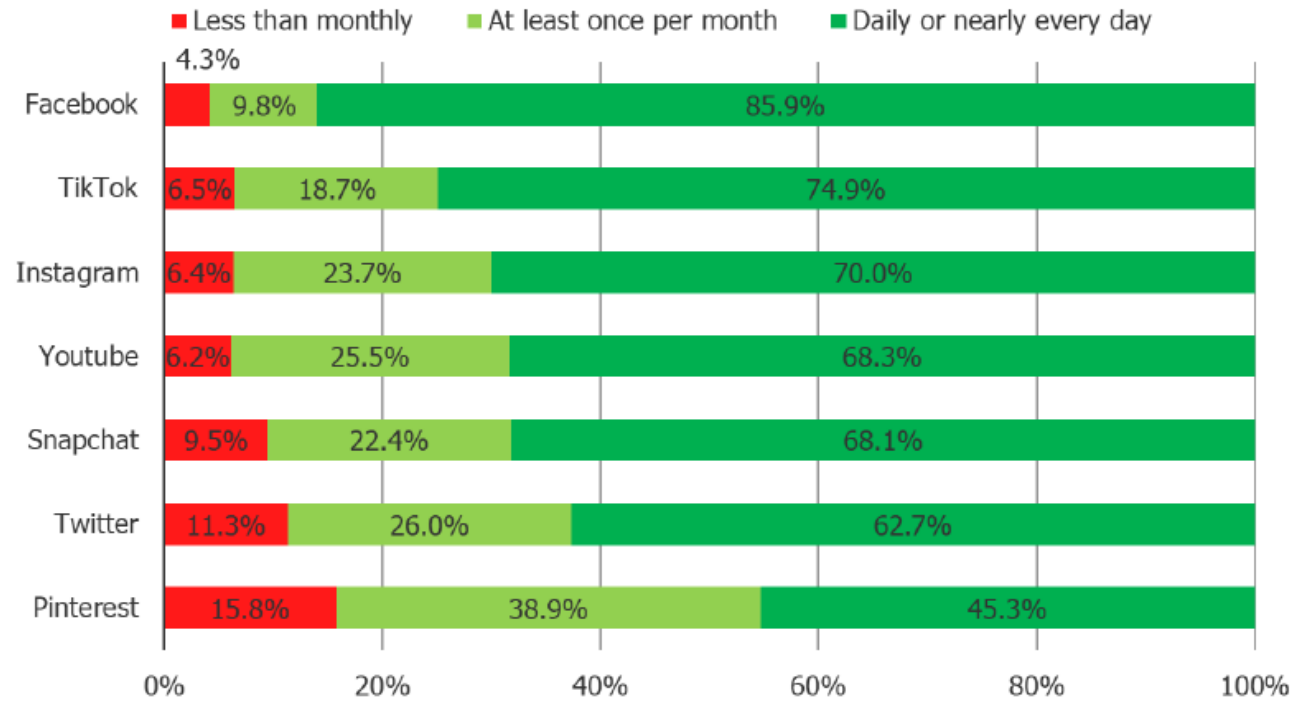
**Takeaway: Facebook engagement and Sentiment KPIs are strong. Other apps, however, are on more even footing with Facebook among 18-24 year olds.**

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## How often do you visit this app or website?

Posed to social media users currently use each of the following:

	N =
Youtube	761
Pinterest	411
Snapchat	326
TikTok	370
Twitter	362
Instagram	520
Facebook	775



**Age Cuts: (Weighted Average – 1 = Less than monthly, 2 = at least once per month, 3 = daily)**

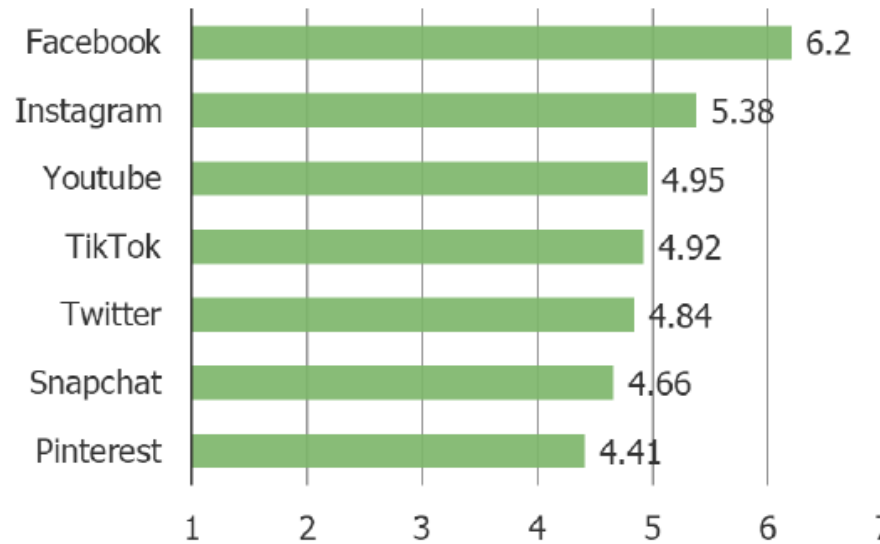
	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	2.74	2.8	2.77	2.78	2.57	2.35	2.72
Age: 25 to 34	2.75	2.68	2.68	2.57	2.49	2.38	2.72
Age: 35 to 44	2.82	2.64	2.61	2.55	2.59	2.32	2.7
Age: 45 to 54	2.82	2.62	2.74	2.59	2.53	2.37	2.67
Age: 55 to 64	2.87	2.48	2.5	2.18	2.38	2.21	2.49
Age: 65 to 74	2.86	2.44	2.67	2	2.5	2.03	2.31
Age: 75 or older	2.88	2.36	3	2.33	2	2.05	2.29

**Note: Visit frequency of Facebook is similar by age, the younger cohorts just ALSO visit other platforms frequently.**

**When you open your phone to look at social media apps, in which order do you typically open the apps? Rank them from first at the top to last at the bottom.**

Posed to social media users who use each of the following currently (The higher the score, the more often it was ranked first):

	N =
Pinterest	405
Snapchat	321
Twitter	357
TikTok	362
Youtube	751
Instagram	507
Facebook	753



## Age Cuts:

	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	5.08	5.80	5.20	5.52	4.65	3.96	4.70
Age: 25 to 34	5.83	5.46	4.70	4.51	4.86	3.96	4.41
Age: 35 to 44	6.03	5.23	4.95	4.54	4.69	4.20	4.71
Age: 45 to 54	6.39	5.23	4.83	4.00	4.72	4.50	5.01
Age: 55 to 64	6.62	5.25	5.04	4.59	5.13	5.02	5.61
Age: 65 to 74	6.77	5.36	4.88	3.50	5.73	5.07	5.54
Age: 75 or older	6.80	5.21	4.00	3.67	4.86	5.00	5.70

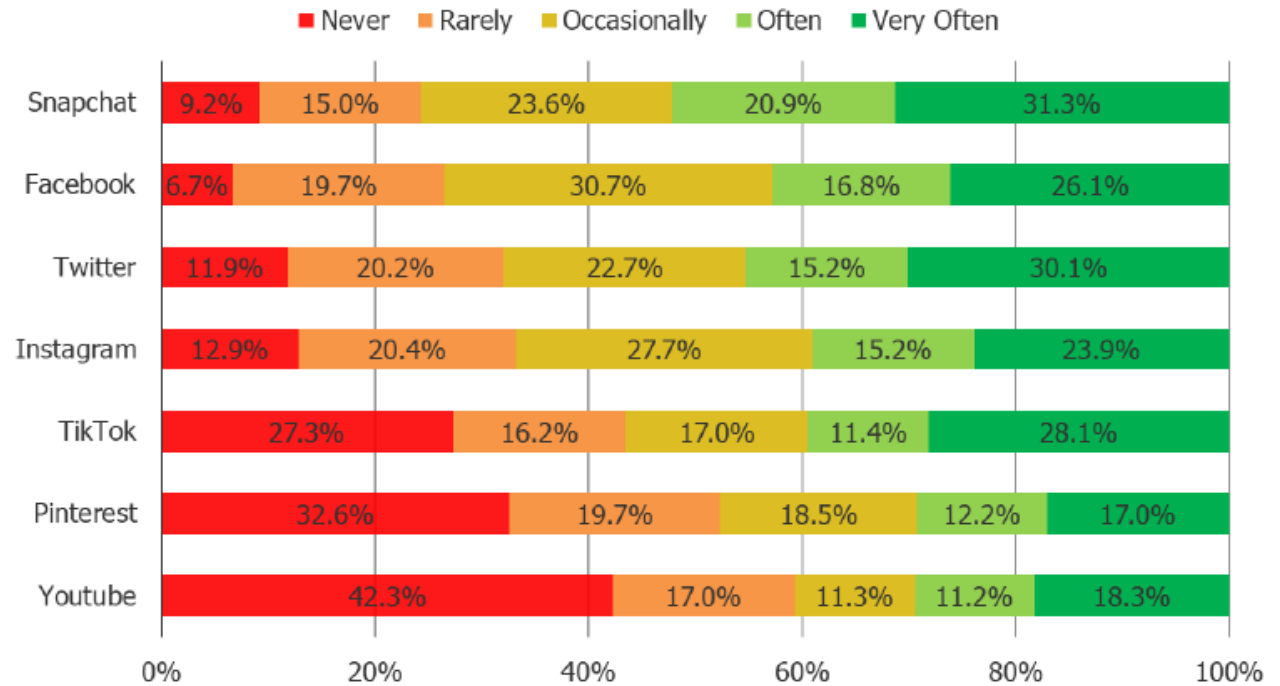
**Facebook is the first app to be checked for all age cohorts except 18-24.**



## How often do you post on the following?

Posed to social media users currently use each of the following:

	N =
Youtube	761
Pinterest	411
Snapchat	326
TikTok	370
Twitter	362
Instagram	520
Facebook	775



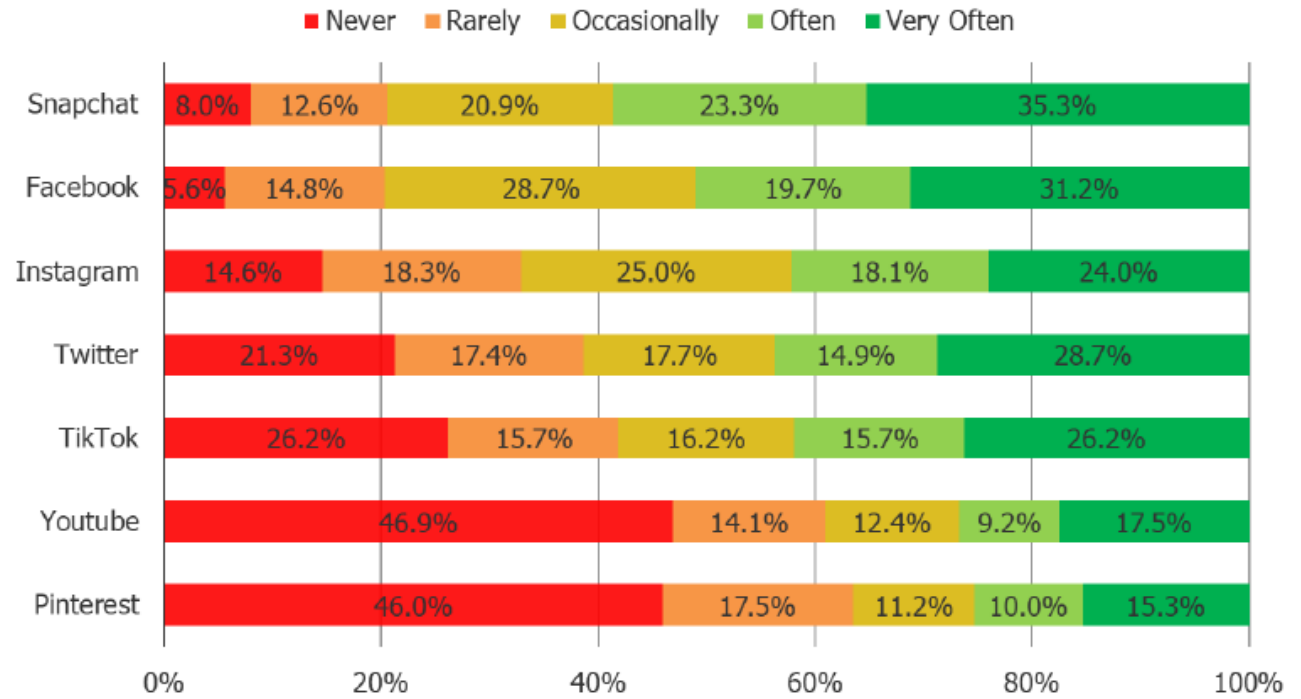
## Age Cuts: (Weighted Average – 1 = Less than monthly, 2 = at least once per month, 3 = daily)

	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	3.14	3.25	3.11	3.65	2.96	2.52	2.59
Age: 25 to 34	3.88	3.76	3.42	3.78	3.9	3.28	3.17
Age: 35 to 44	3.59	3.22	3	3.62	3.57	2.89	2.65
Age: 45 to 54	3.4	3.03	2.68	3.22	3.22	2.59	2.49
Age: 55 to 64	3.1	2.46	2.11	2.59	2.63	2.11	1.83
Age: 65 to 74	2.88	2.32	1.89	1	2.95	1.97	1.63
Age: 75 or older	2.8	2.07	2	1.67	2	1.53	1.54

## How often do you message others users on the following:

Posed to social media users currently use each of the following:

	N =
Youtube	761
Pinterest	411
Snapchat	326
TikTok	370
Twitter	362
Instagram	520
Facebook	775



## Age Cuts: (Weighted Average – 1 = Less than monthly, 2 = at least once per month, 3 = daily)

	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	3.44	3.61	3.01	4.08	2.73	2.42	2.46
Age: 25 to 34	4.02	3.7	3.43	3.9	3.72	2.96	3.09
Age: 35 to 44	3.86	3.21	3.03	3.56	3.45	2.61	2.6
Age: 45 to 54	3.59	2.88	2.88	3.41	2.99	2.39	2.37
Age: 55 to 64	3.19	2.54	1.96	2.55	2.42	1.5	1.66
Age: 65 to 74	3.14	2.4	2.44	2	2.68	1.53	1.56
Age: 75 or older	3.06	2	2.33	2	1.86	1.42	1.57

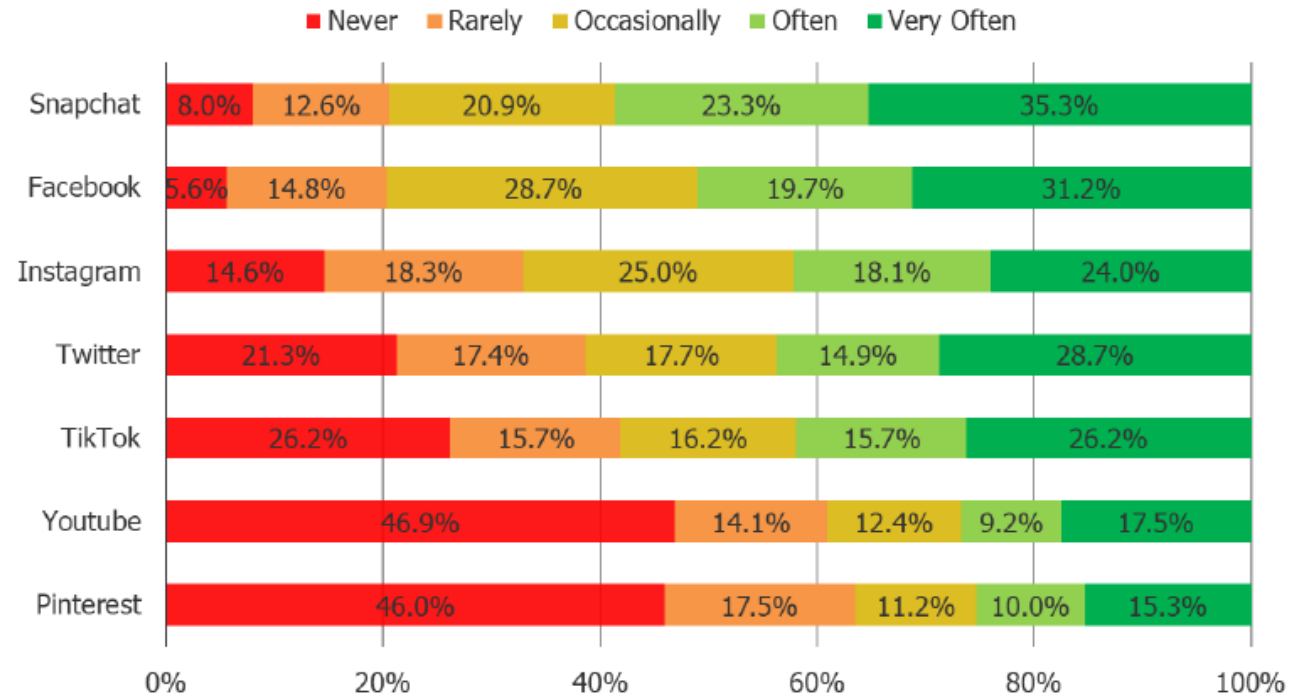
**Takeaway: Snapchat leads in messaging (and recall earlier, Twitter leads for News).**

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## How often do you message others users on the following:

Posed to social media users currently use each of the following:

	N =
Youtube	761
Pinterest	411
Snapchat	326
TikTok	370
Twitter	362
Instagram	520
Facebook	775



## Age Cuts: (Weighted Average – 1 = Less than monthly, 2 = at least once per month, 3 = daily)

	Facebook	Instagram	TikTok	Snapchat	Twitter	Pinterest	Youtube
Age: 18 to 24	3.44	3.61	3.01	4.08	2.73	2.42	2.46
Age: 25 to 34	4.02	3.7	3.43	3.9	3.72	2.96	3.09
Age: 35 to 44	3.86	3.21	3.03	3.56	3.45	2.61	2.6
Age: 45 to 54	3.59	2.88	2.88	3.41	2.99	2.39	2.37
Age: 55 to 64	3.19	2.54	1.96	2.55	2.42	1.5	1.66
Age: 65 to 74	3.14	2.4	2.44	2	2.68	1.53	1.56
Age: 75 or older	3.06	2	2.33	2	1.86	1.42	1.57