



US Social Trends for 2019

eMarketer's Predictions for the Year Ahead

Despite the unflattering news surrounding social media last year, eMarketer expects marketers to continue to invest ad dollars there, and as a result, several milestones will be reached in 2019. We run down what our predictions are for the social landscape this year.

presented by





Dear eMarketer Reader,

eMarketer is pleased to make this report, **US Social Trends for 2019**, available to our readers.

This report is a great example of eMarketer data and insights that look at our forecasts and predictions for social media this year, and highlights positive trends for social shopping and more.

We invite you to learn more about [eMarketer's approach to research](#) and why we are considered the industry standard by the world's leading brands, media companies and agencies.

We thank you for your interest in our report and **Salesforce** for making it possible to offer it to you today.

Best Regards,

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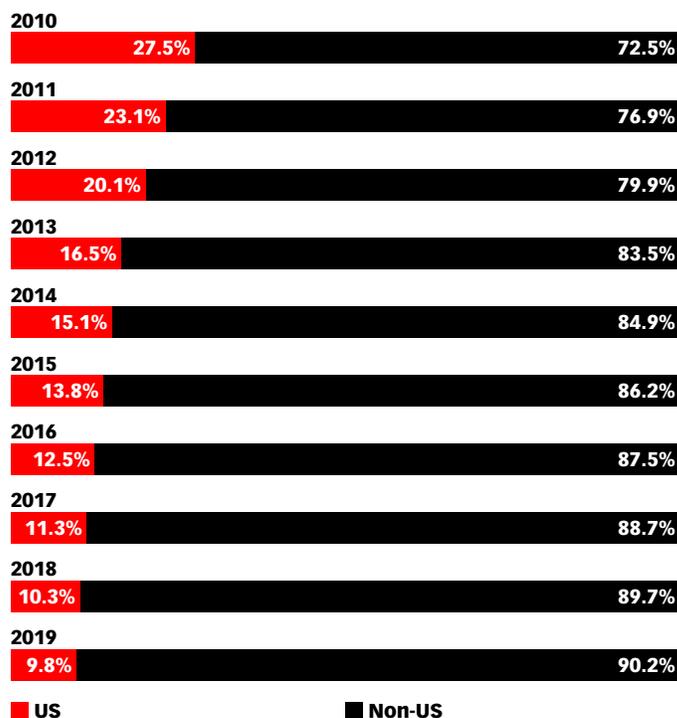
US SOCIAL TRENDS FOR 2019: EMARKETER'S PREDICTIONS FOR THE YEAR

2018 was a turbulent year for social media, and we believe more fallout is ahead, especially for Facebook. Here is what we will be watching for in 2019.

- **What will happen with Facebook?** Marketers will continue to advertise there, even though there are mounting signs of trouble with usage and engagement in the US. However, the US will make up just 10% of Facebook's global user base this year, and user growth is still strong in other markets, such as Asia-Pacific.
- **What about Instagram and Snapchat?** We think Instagram will experience some growing pains this year. It will chafe against its parent company, Facebook, and we expect that the investigations into data practices and privacy that last year focused on Facebook will widen to include Instagram. Snapchat will continue to experience usage challenges in the US but will make up for them (partially) by increasing average ad revenue per user (AARPU).
- **Will stories really take over feeds?** We expect an explosion of stories and vertical video across the digital landscape. That will lead to the inevitable swing of the pendulum toward backlash and questioning about stories' effectiveness. Facebook will work hard to promote the format to users and advertisers, but the feed will remain the dominant way users use the app.
- **What will happen with hot-button areas such as social shopping, social video and influencer marketing?** We're expecting positive trends for social shopping, another year of challenges for social video shows and a shift away from celebrity influencers back toward those with fewer followers.

WHAT'S IN THIS REPORT? This report features our forecasts and predictions for social media in 2019.

What Percentage of Facebook Users Are in the US? % of total, 2010-2019



Note: internet users of any age who use Facebook via any device at least once per month
Source: eMarketer, Nov 2018

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KEY STAT: This year, less than 10% of Facebook's users will be in the US, as growth continues in Asia-Pacific and beyond.

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KEY EMARKETER FORECASTS FOR THE YEAR AHEAD

Despite a raft of negative news surrounding social media in 2018, marketers will continue to invest ad dollars there, and as a result, several milestones will be reached. On the usage front, 2019 will be a year to closely watch what happens with changing user engagement.

FACEBOOK WILL CONTINUE TO PROFIT, BUT USAGE PROBLEMS WILL PERSIST

Marketers' love affair with Facebook will continue this year. However, user engagement issues will at least cause them to think twice.

We expect Facebook and Instagram will bring in a combined \$67.25 billion in worldwide ad revenue, up 23.5% from 2018. In the US, expenditures will increase 20.6%, to \$27.57 billion this year. Much as marketers have had trouble shifting ad dollars away from linear TV despite declining audiences, they won't be inclined to quit Facebook either, despite its mounting problems.

But those problems are substantial. We expect time spent on Facebook among US users will remain flat this year, at 40 minutes per day. Time spent on Instagram will inch up only slightly, to 27 minutes from 26 minutes in 2018.

Flat engagement means Facebook is also losing share of digital content consumption. According to an analysis of Nielsen Digital Content Ratings data by Pivotal Research, total digital content consumption among adults 18 and older rose 14% year over year in October 2018, but Facebook's properties (Facebook, Messenger, Instagram and WhatsApp) gained just 1%. Those properties combined for a less than 14% share of content consumption, down from 16% in October 2017 and 18% in October 2016.

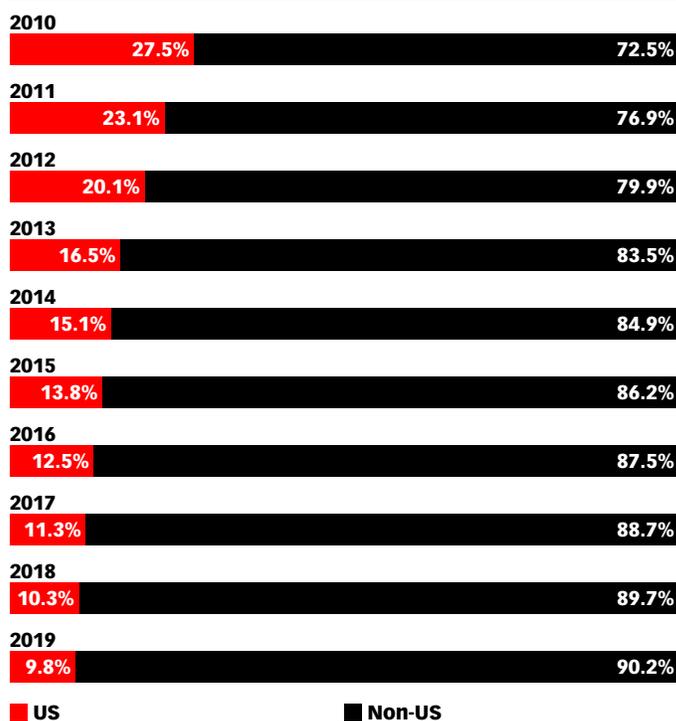
Facebook can't rely on stories or Facebook Watch to pick up the slack. It hasn't cracked the code on getting more of its users to use stories, despite their popularity on Instagram. And its efforts to build out a video hub have had mixed success. The longer it takes for the company to figure out how to stem fake news, negative content and other major issues, the more Facebook will struggle to keep users engaged.

For more predictions across the digital landscape, read our December 2018 report, "[Ten Key Digital Trends for 2019: Our Predictions for What Will Matter to Marketers, and What Won't.](#)"

US FACEBOOK USERS WILL MAKE UP LESS THAN 10% OF WORLDWIDE USER BASE

Facebook may have been born in the US, but Asia-Pacific is where more than four in 10 of its users will be located this year. Meanwhile, less than 10% of Facebook's 1.75 billion worldwide users will be in the US (9.8%, to be exact). That's down from 10.3% in 2018.

What Percentage of Facebook Users Are in the US? % of total, 2010-2019



Note: internet users of any age who use Facebook via any device at least once per month

Source: eMarketer, Nov 2018

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The US still accounts for a sizeable portion of Facebook's ad revenues, however: an estimated 41.0% this year. That's because many of the countries where Facebook is growing fast are not highly developed ad markets, such as India, where the number of Facebook users will rise 15.5% this year, or Indonesia, expected to be up 10.9%.

Still, with so many users outside of the US, marketers might reconsider just how much of their Facebook ad budget is rooted in the US market, and whether spending to reach users where Facebook is still on a growth trajectory would make sense.

SOCIAL NETWORK AD SPENDING WILL APPROACH 50% OF TV AD SPENDING

As we've already pointed out, despite Facebook's problems, US markets will continue their social spending there in 2019. Next year, they will put \$32.18 billion into social ads, with the vast majority—\$27.57 billion—going to you-know-who. That will bring social ad spending to 47% of TV ad spending (\$69.17 billion) this year.

In 2020, we predict social ad spending will grow to make up 54% of TV ad spending, as expenditures on the latter continue their slow decline. Does this mean that TV ad dollars are shifting to social? It's true that a small portion probably are, but the increases for social are more likely to be coming from shifts within the digital space.

For more proof of social's continued importance, we have two other milestones to mention compared with traditional media. In 2019, social ad spending will be more than double the US expenditures on radio (\$14.43 billion) and print advertising (\$15.41 billion).

INSTAGRAM USERS WILL OUTNUMBER PRINT READERS

In 2018, Hearst shifted venerable women's service magazine Redbook and teen bible Seventeen to digital-only; Conde Nast did the same with Glamour. Could Instagram be to blame?

For the first time ever, the number of Instagram users will surpass that of print readers in 2019. Instagram will have 113.3 million US users, while print will have 112.7 million readers. In full disclosure, our Instagram forecast includes users of any age, while our print forecast covers only those 18 and up. But there's little research to suggest many people under 18 read print publications.

Among adults, trends are also shifting toward social media. Pew Research Center found in a July-August 2018 survey that 20% of US adults often get news from social media, greater than the 16% who do so from print newspapers. In its 2017 study, the percentages for newspapers and social media were about equal.

One more sign of decline for the print industry: Next year, for the first time, Snapchat's US user count (90.4 million) will top the number of magazine readers (ages 18 and older) in the US (84.4 million), according to our forecast.

SNAPCHAT USAGE WILL SLOW, BUT IT WILL HAVE BETTER LUCK WRINGING REVENUES OUT OF EXISTING USERS

Even if there are more Snapchat users than magazine readers, that doesn't mean Snapchat is out of the woods when it comes to its slowing user growth. We expect that its US user base will grow 6.6% this year, below Instagram's expected 8.2% growth rate.

Snapchat knows it needs to turn that trend around, and one way it has said it would do that is by attracting more older users. But we don't think it will have much luck, at least not in the US. We estimate that 20.6% of US users were ages 35 and older in 2018, and we expect changes to be negligible, growing to 21.4% in 2019 and 23.7% in 2022.

Meanwhile, we expect user growth in Snapchat's core audience (ages 34 and younger) will be minimal this year; under 3% for the 12-to-24 age group and a bit higher at 8.9% for those ages 25 to 34.

The silver lining (which Snapchat definitely needs) is that the company will succeed in wringing more ad revenue out of the users it does have. We estimate that US average ad revenue per user (AARPU) will top \$10 this year (\$10.18 to be exact), up 30.4% over 2018 (when AARPU grew just 10.9%). Several factors will contribute to the AARPU growth, including stronger advertiser uptake of new ad products launched in 2018, such as the direct-response Shoppable Snap Ads and Collection Ads; stabilization of ad pricing after the rollout of programmatic buying; and improvements in ROI.

For more on Snapchat, read our October 2018 report [“Snapchat and Twitter 2018: Many Challenges, but a Few Things Advertisers Still Like.”](#)

WHAT ELSE LIES AHEAD IN 2019?

Here are our predictions across other hot-button areas including social stories, vertical video, the future of feeds and more.

EXPLOSION OF STORIES—FOLLOWED BY BACKLASH

Expect story mania to grip the internet in 2019. Stories were one of the trendiest marketing vehicles of 2018, which means in 2019, everyone will start questioning them.

Evidence of story mania began to mount in late 2018, as both YouTube and LinkedIn announced their own versions of stories, adding to the offerings from Instagram, Snapchat and Facebook. Twitter has been notably absent from this phenomenon, but it's not hard to imagine its Moments feature morphing into stories.

Facebook CEO Mark Zuckerberg has emerged as one of the biggest cheerleaders for stories. "Just like most major social apps have feeds—including Pinterest, Twitter or LinkedIn—but you wouldn't say that those services do the same things, I think many services will have stories in the future too, but [they] will serve different functions," he said during Facebook's Q3 2018 earnings call in August. Of course, his companies stand to benefit mightily if marketers gravitate toward stories.

But we want to sound a note of caution. As with real-time marketing, another highly faddish marketing concept of a few years ago, we're expecting to see a raft of new creative shops emerge to help brands develop and create stories, and we may even see the re-emergence of corporate social media war rooms, only this time they'll be set up for story production instead of real-time tweets. We're not saying marketers shouldn't invest some resources into stories, but going too far in that direction may lead to an unhappy ending.

VERTICAL VIDEO WILL SPREAD

In tandem with the rise of stories, vertical video will take hold as the primary way in which video is created and consumed on mobile platforms. Vertical video is a natural fit for mobile, since that's how we all hold our phones. But it's not a natural fit for marketers, especially those who spend a lot of money on TV.

But don't be surprised if consumer behaviors end up leading the way for marketers. Consumers embraced mobile devices long before marketers wised up and shifted their own ad budgets to mobile. And consumers are similarly shifting their video viewing to mobile; we estimate 70.1% of mobile users in the US will watch mobile video in 2019, accounting for 81.5% of digital video viewers and 57.9% of the adult population.

However, mobile video ad spending will be less than one-sixth of TV ad spending, according to Zenith—\$11.96 billion vs. \$67.23 billion for TV next year.

2018 saw a push for premium, longer-form vertical video on social platforms and elsewhere. Facebook released and helped produce a series of vertical news programs in June 2018, while Snapchat announced Snapchat Originals in October 2018. The ad formats will lag—expect to see a lot of kludge-y vertical video ads that started out as horizontal ads—but by the end of this year we'll start to see some real progress. Consumers and publishers will embrace vertical video and marketers will have no choice but to go along.

For more mobile-related predictions read our December 2018 report ["Mobile Trends 2019: 10 Predictions for What Marketers Can Expect."](#)

NEWS FEED WILL REMAIN SOCIAL MEDIA'S PRIMARY UI

Even though we expect stories and vertical video to proliferate in 2019, we don't think consumer attention will significantly shift away from the feed, the main user interface for social media (and for much of the digital landscape) for the past 10 years.

Feeds have become one-stop shops for users to quickly scan and engage with content. Stories are discrete packages that users must swipe through one at a time. For discovery and finding information, users highly prefer the feed over stories, according to 2017 research done by Facebook IQ among users of Instagram.

The feed has also been Facebook's cash cow, driving nearly all of the company's ad revenue. New ad formats within in-stream video, search and stories have seen less uptake. That's partially due to inertia; feed ads have become a basic building block of many media plans. Getting marketers to make large shifts will be challenging.

There's one big if to add to this prediction, however. If Facebook were to shake up its own UI and make stories front and center rather than a series of small icons at the top of the feed, then users (and marketers) would have no choice but to shift. In late 2018, Instagram accidentally released a test version of its app that let users swipe horizontally through feed posts like they do stories. Given users' swift negative reaction to the short-lived change, we don't foresee Facebook abandoning the feed in 2019.

INSTAGRAM WILL SUFFER GROWING PAINS

Facebook's upstart social network is approaching its tween years (it turns 9 this year), and that will cause growing pains. Instagram will desperately try to assert its independence, but it will also face the reality that it needs its parent for support, guidance—and ad revenue.

When Instagram's founders, Kevin Systrom and Mike Krieger, announced plans to leave last year, reports surfaced of disagreements over Facebook's level of involvement with the company. It's easy to see why: Instagram has avoided most of the reputation problems suffered by its parent company over the past several years and in doing so has shown strong user growth. Last year Instagram's worldwide monthly user base increased nearly 20%, to 713.9 million (note that our estimate factors out duplicate, spam, business and other nonhuman users).

But the success of Instagram is deeply intertwined with Facebook. Much of its ad business growth—worldwide revenues more than doubled last year to \$9 billion, we estimate—has come because extending an ad buy to Instagram is as easy as checking a box in Facebook's ad manager. And features like Instagram Stories have been highly successful, putting pressure on the app to continue delivering hit marketing concepts.

Challenges Instagram could face in 2019 include: user dissatisfaction over the growing ad load, an increase in the use of the platform for bullying/trolling and election meddling. In late 2018 a US Senate Intelligence Committee-commissioned report revealed that the Russian Internet Research Agency relied heavily on Instagram to spread misinformation and stoke discontent during the 2016 election and beyond. The report found that Instagram was more effective at driving engagement with such content than Facebook or Twitter.

While most eyes will be on Facebook and how that social network navigates 2019, it will be wise to watch for signs of trouble on Instagram as well.

WHEELS ON SOCIAL SHOPPING CART WILL FINALLY START MOVING

Social shopping has gained little traction over the years, but several developments in 2018 point toward a larger role for the social platforms in not only driving interest in products, but also purchases, in 2019.

Last year, Snapchat announced a partnership with Amazon to test a visual search tool; it also introduced several shopping-related ad types. Instagram debuted shopping features in the Explore tab and in stories and was rumored to be working on a separate shopping app. And in December 2018, Vishal Shah, the Instagram executive who led the app's move into shopping, was promoted to head of product for the entire company.

Where a few years ago the focus was on conducting transactions directly within the social platforms, now the goal is to use the highly visual nature of social media to encourage shoppers to make purchases anywhere. We're expecting all the social platforms to introduce more shopping-related ad types in 2019, while Pinterest is widely expected to file for an initial public offering.

The ubiquity of mobile devices and the increasing importance of mcommerce are contributing to this resurging interest in social shopping. This year 44.7% of all ecommerce sales in the US will be conducted on mobile devices—more than \$270 billion worth. Social properties are playing an increasingly important role in helping those purchases happen.

For more on social commerce, read our December 2018 report, [“The Future of Retail in 2019: Top 10 Trends that Will Shape Retail in the Year Ahead.”](#)

GOODBYE CELEBRITY INFLUENCERS, HELLO 'NANO-INFLUENCERS'

For years, marketers have chased after big-name celebrities, creators and YouTube stars, but this year, their ambitions will get a lot smaller. That's because we'll see a shift in attention away from influencers with millions of followers toward nano-influencers with just thousands.

The idea of working with people who have smaller followings isn't new (there's already the concept of microinfluencers, people with followings in the tens of thousands). But growing concern about things like fake followers, non-disclosure of marketing ties and the fact that many big-name influencers will shill a product just to make a buck is creating renewed interest in working with people who might actually like and use a marketer's product.

According to a study of 59 million engagements (likes and comments) on 1,200 influencer posts by Accuracast, "marketers are likely to receive the same level of engagement from 10 micro influencers with a following of 50,000 as they would from one mega influencer with 500,000 followers"—except on YouTube, where engagement (in the form of likes) is disproportionately higher.

Last year, Kellogg said it would no longer pay influencers based on reach because it can't determine whether their followers are real or fake. And cosmetics brand Rimmel has shifted its focus to unpaid influencers vs. those it has to pay for.

One caveat is that although there are plenty of vendors that can connect marketers with nano- or microinfluencers and help manage campaigns, the prospect of working with thousands of them is still highly daunting. And gauging results may also be challenging, since everything is happening on a smaller scale.

But in an industry that's gotten so big, a back-to-basics approach just might be the right thing.

OUR 2018 PREDICTIONS: HERE'S HOW WE DID

Of the 12 predictions about social media that we made in January 2018, five were correct, three were partially correct and four were wrong. Here's a recap.

To see our full list of 2018 social media predictions, read our January 2018 report, ["US Social Trends for 2018: eMarketer's Predictions for the Year."](#)

WHAT WE GOT RIGHT

Facebook will take in 10% of all US ad spending. As of our September 2018 forecast, the social powerhouse was on track to reach that milestone with \$22.87 billion in US ad revenue, which will amount to just over 10% of the \$223.7 billion spent on total media advertising. In 2019, we anticipate Facebook's share will climb to 11.5%.

There will be nearly 200 million social network users in the US. That's correct; in our January 2018 report we estimated there would be 199.2 million, and in November 2018 we updated the forecast to 199.5 million. Even if Facebook's user growth has essentially flatlined, Instagram and Snapchat are still growing.

Social ad transparency becomes a big deal. We correctly predicted that the political ad databases that Facebook and Twitter were developing would get a lot of attention this year. As we also predicted, there would be bumps along the way, particularly for Facebook. In November 2018, it delayed the launch of its transparency database in the UK after numerous reports that the system could be gamed; the company has also had many instances of nonpolitical ads being misidentified as political (such as an ad for Bush's Baked Beans). Twitter has had fewer problems, but neither company has met its goal of full ad transparency yet.

Facebook and Twitter won't solve the fake-news challenge. This one was a bit of a gimme; the issues surrounding fake news are deep and complex. While both platforms made progress this year by using artificial intelligence and human analysts to help find and stop fake news before it spreads, this challenge will continue in 2019—and likely beyond.

Shows on social platforms will struggle to gain audiences and advertisers. The platforms don't share much about viewership of their shows, and there may be a good reason for that: Many of them aren't doing well. "Red Table Talk" on Facebook has been a bona fide hit, racking up tens of millions of views for many episodes, but the highly regarded "Sorry for Your Loss" quickly lost viewership after its initial buzz. Other shows have also fared poorly. Advertisers also reported mixed results from in-stream advertising in social shows last year. But the platforms continue to experiment, so this is one area to keep watching.

WHAT WE GOT PARTIALLY RIGHT

Consumers will view plenty of video in social. If you include stories, that's certainly true. But other forms of video, such as live video, aren't as big a part of social networks as we once thought they would be. And several publishers that tried to build video businesses on top of Facebook have scaled back their ambitions or closed down entirely. Digital video viewing is definitely growing (we forecast that 82.6% of internet users will be digital video viewers next year, up from 81.8% this year). But a lot of that viewing is happening on YouTube and nonsocial platforms, and that's probably going to continue this year.

Augmented reality (AR) will soar; virtual reality (VR) will not. We got the last half of this prediction right for sure; VR is still a non-starter for most consumers and businesses outside of some specialized applications or games. Did AR take off as we thought it would when we published our 2018 predictions report last January? Not quite, but it certainly got a lot more buzz thanks to Snapchat's filters and lenses and Instagram Stories. "After years of development, AR technology—and its growing list of use cases—is on the brink of mainstream adoption," we wrote in an October 2018 report. If it didn't soar in 2018, there's a good chance it will in 2019.

For more on AR marketing and advertising, read our October 2018 report ["Augmented Reality Marketing and Advertising 2018: Adding Virtual Value to the Real World."](#)

Strong headwinds are ahead for influencer marketing.

This time last year, we thought we saw signs that the Federal Trade Commission would crack down on marketers and influencers that didn't properly disclose their ties. We also thought Instagram would take steps to reduce the organic reach of branded influencer posts. Neither of those specific things happened, but the influencer industry didn't exactly emerge unscathed either. There were still plenty of instances of non-disclosure, as well as follower/like fraud. In late 2018, Instagram began actively removing fake likes and followers, which indicates that it will not remain as hands-off in the future as it has been. All in all, the headwinds we thought would appear in 2018 may actually end up hitting in 2019.

WHAT WE GOT WRONG

Twitter and Snapchat will reach parity in US ad revenue. We were way off with this one. This time last year, we expected Snapchat would bring in \$1.18 billion in the US in 2018, but we now expect it won't break the \$1 billion mark until 2020. Instead, we estimate Snapchat made just \$662.1 million in net US ad revenues last year, compared with \$1.15 billion for the stronger-performing Twitter.

US messaging app usage will rival social network usage. Messaging is definitely popular in the US, but there were 33% more social network users than messaging users in 2018 (149.8 million vs. 199.5 million), at least as of our most recent estimate in July 2018. (We'll have a new prediction out later this year.) We also predicted in 2018 that Facebook would make a substantial push for advertising in Messenger; it did launch a few new ad products, but overall the buzz for messaging app advertising remains muted.

Nearly half of the US population will use Facebook on mobile. Due to slightly slower growth for Facebook as a whole this year, the percentage reached 47.9% instead of the 49.9% of the US population we had predicted. That's still a heck of a lot of people—93% of all US Facebook users use it on a mobile device—so even if the numbers were slightly off, our viewpoint remains unchanged. If you're a marketer, it's no longer optional to have a fully developed mobile strategy for Facebook (or in general, for that matter).

Nearly three-quarters of US marketers will use Instagram. Instagram usage among marketers is still growing, but not quite as fast as we expected. In our latest forecast, published in December 2018, we estimated that 69.2% of US marketers with 100 employees or more used it for marketing last year, including both organic and paid functions. While that's still behind Facebook (used by 86.3% of marketers), it's well ahead of Snapchat, used by just 28.3% of marketers.

For more on marketers' use of social media, read ["How Many Marketers in the US Use Facebook?"](#) and ["How Many Marketers Use Snapchat and Instagram in the US?"](#)

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Top marketers are talking goals for 2019.

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