

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“COVID-19 has seen social media platforms take a stronger content moderation role, such as overtly promoting trusted sources and banning users that are spreading misinformation. This comes as platforms face more pressure from consumers, governments and advertisers to tackle the issue of fake news, as well as hate speech and other harmful content.”

– **Rebecca McGrath, Senior Media Analyst**

This report looks at the following areas:

What you need to know

Nearly nine in ten (87%) social media users think that social networks should warn users if a news story is likely to be fake, demonstrating that people feel networks have a responsibility to protect users from content on their platforms. This has been particularly important during the outbreak as social networks have been attempting to tackle the problem of COVID-19 misinformation.

The COVID-19 outbreak has caused a surge in use of social media platforms, with features such as livestreaming and messaging performing particularly strongly. A drop in digital advertising revenue has, however, prevented the platforms from feeling the full benefit of this increased use. Networks have taken a very strong stance on tackling the spread of virus misinformation by promoting trusted sources, such as the WHO, and flagging or banning users that are spreading fake news about COVID-19.

Social media platforms are under ever increasing scrutiny from consumers, regulators and advertisers over their potential societal harm, from the spread of misinformation and hate speech to concerns over their negative impact on users' mental health. An advertising boycott, principally of Facebook, which began in June 2020, demonstrates how advertisers are increasingly worried about consumer backlash from appearing alongside controversial content on social media.

High engagement during the pandemic is, however, providing a good opportunity for platforms to introduce new features that are likely to be particularly well received during this moment, such as e-commerce, livestreaming and video chatting options. TikTok has also entered the mainstream over the last few months, with the platform showing significant potential to rival the current top five networks.

Key issues covered in this Report

- The impact of COVID-19 on social media
- Key development from the major social media networks over the last year
- Frequency of use of different social media networks
- Consumers' social media priorities and perceptions of the major networks
- Consumers' attitudes towards social media

Products covered in this Report

Mintel defines social media networks as any network focused on facilitating person-to-person interactions or sharing media with other users.

The 'Top Five' social media networks refer to the group of platforms which take up the largest sections of the market – Facebook, YouTube, Twitter, Instagram and Snapchat.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

For a more specific focus on social media influencers and creators see Mintel's Influencers – UK, January 2020 Report.

Market Context

This update on the impact that COVID-19 is having on the UK was prepared on 9 July 2020.

The first COVID-19 cases were confirmed in the UK at the end of January, with a small number of cases in February. The government focused on the 'contain' stage of its strategy, with the country continuing to operate much as normal. As the case level rose, the government ordered the closure of non-essential stores on 20 March.

A wider lockdown requiring people to stay at home except for essential shopping, exercise and work 'if absolutely necessary' followed on 23 March. Initially, a three-week timeframe was put on the measures, which was extended in mid-April for another three weeks.

On 10 May 2020, the Prime Minister announced revised guidance, recommending that people who could not work from home should return to the workplace, and gave people more scope to spend time out of the home. Further relaxations to lockdown rules were announced in the week of 23 May, including the gradual re-opening of non-essential retailers, and increased opportunities for social interaction across households. Hospitality businesses, such as pubs and restaurants, and other public places were re-opened on 4 July 2020. On 9 July 2020 the government announced that leisure facilities and beauty services were to open at select dates throughout the rest of the month.

At the time of writing, 9 July 2020, the FCO still advises against all but essential international travel for an indefinite period. Some countries, including much of Europe, were made exemptions as of 4 July 2020 as they were judged to be "no longer presenting an unacceptably high risk to British people travelling abroad".

Economic and other assumptions

Our economic assumptions are based on the illustrative scenario included in the Bank of England's Monetary Policy Report, released on 7 May 2020. The scenario suggests that UK GDP could fall by 14% in 2020, recovering by 15% in 2021, and that unemployment will reach 8% by the end of the year, easing slightly to 7% by the end of 2021. The current uncertainty means that there is wide variation on the range of forecasts however, and the numbers presented in the BoE's illustrative scenario are at the more pessimistic end of the spectrum.

We are working on the assumption that a vaccine will be available by mid-2021, but that there will be continued disruption to both domestic and global markets for some time after that. As long as there is not a second wave of infections, social distancing measures should be gradually relaxed over the course of 2020, but we don't expect industries such as spectator sports, tourism or foodservice to return to any kind of normality until a vaccine is introduced.

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Key issues covered in this Report
Products covered in this Report
Market Context
Economic and other assumptions

Executive Summary

The Market
Short-, medium- and long-term impact of COVID-19
Figure 1: Short-, medium- and long-term impact of COVID-19 on social media, 30 June 2020
Facebook boycott demonstrates advertisers' growing concern about controversial content on social media
Trump signs executive order that reduces protections for social media networks
Ofcom's regulatory role over social media set to be expanded
Social media platforms start removing political adverts heading into 2020 US election
Key Players
Shops launched by Facebook
Instagram tests hiding public like counts
Instagram rolling out TikTok-style Reels
Google reveals YouTube ad revenue for first time
Twitter tests Stories-like feature Fleets
The consumer
More than six in ten people aged 55+ use Facebook
Figure 2: Use of social media platforms, 19-30 March 2020
Figure 3: Use of top-5 social media networks in the last 3 months, 2017-20
Facebook and Instagram are the most frequently used networks
Figure 4: Frequency visit social media networks, 19-30 March 2020
Decline in use of devices other than a smartphone for social media
Figure 5: Devices used for social media, March 2018, March 2019 and 19-30 March 2020
Figure 6: Preferred device for social media, March 2018, March 2019 and 19-30 March 2020
People want social media to intervene on fake news
Figure 7: Attitudes towards social media, 19-30 March 2020
Ease of content discovery is the greatest priority for younger people
Figure 8: Top reasons choose a social network over another, 19-30 March 2020
Facebook controversies have caused reputational damage
Figure 9: Correspondence Analysis on social media platforms, 19-30 March 2020
Figure 10: Social and Media Networks, March 2020
What we think

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Impact of COVID-19 on Social Media

- Use of social media booms
- Crisis increases appetite for livestreaming and video calling
- Platforms take strong measures to tackle virus misinformation, which could have long-term implications
- COVID-19 presents opportunity for networks to further e-commerce role
- Networks will need to step up efforts to protect mental health
- Influencers forced to change content in face of restrictions on movement
- Platforms offer COVID-19 help to people and businesses most affected
- Platforms to compete over more limited adspend during COVID-19 recession

Issues and Insights

- COVID-19 further pushes social networks to regulate content
- The facts
- The Implications
- Mental health becomes a greater focus
- The facts
- The implications

The Market – What You Need to Know

- Facebook boycott demonstrates advertisers' growing concern about controversial content on social media
- Trump signs executive order that reduces protections for social media networks
- Ofcom's regulatory role over social media set to be expanded
- Social media platforms start removing political adverts heading into 2020 US election

Market Drivers

- The Impact of COVID-19 on social media
- Short-, medium- and long-term impact on the industry
 - Figure 11: Short-, medium- and long-term impact of COVID-19 on social media, 30 June 2020
- Use of social media booms
 - Figure 12: UK online visits to top consumer categories, % change between week of 13-19 January 2020 and 23-29 March 2020
- Crisis boosts importance of livestreaming and video calling
- Platforms take strong measures to tackle virus misinformation
- Tangible COVID-19 help will improve brand images
- Platforms to compete over more limited adspend during COVID-19 recession
- Facebook boycott demonstrates advertisers' growing concern about controversial content on social media
- Ofcom's regulatory role over social media set to be expanded
- Trump signs executive order that reduces protections for social media networks
- Social media platforms start removing political adverts heading into 2020 US election

Key Players – What You Need to Know

- Facebook's global user base growing year on year
- Shops launched by Facebook

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Instagram tests hiding public like counts
 Instagram rolling out TikTok-style Reels
 Google reveals YouTube ad revenue for first time
 PewDiePie crosses 100 million subscribers as established YouTubers face more scrutiny
 COVID-19 outbreak contributes to 24% growth in Twitter users
 Twitter tests Stories-like feature Fleets
 Twitter Topics helps people find the content they want
 Strong growth for Snapchat over the last year
 Snapchat announces wide range of new features

Major Players – Facebook, Inc

Facebook
 Facebook's global user base growing year on year
 Figure 13: Facebook daily and monthly active users, 2015-20
 Figure 14: Facebook Family monthly active people, 2018-20
 COVID-19 drives user growth in Q1
 Advertising revenue up in Q1 but takes a hit in March
 Figure 15: Facebook daily active users, by geography, 2019 and 2020
 Shops launched by Facebook
 Facebook announces new payment option in US across family of apps
 Instagram
 Instagram sees live streaming use surge
 Ads introduced on IGTV
 Instagram tests hiding public like counts
 Instagram rolling out TikTok-style Reels

Major Players – YouTube

Google reveals YouTube ad revenue for first time
 YouTube claims viewership has surged since COVID-19 outbreak as it aims to create more helpful content
 Tackling COVID-19 misinformation
 Bans for more far right users
 PewDiePie crosses 100 million subscribers as established YouTubers face more scrutiny
 YouTube launches fashion vertical

Major Players – Twitter

COVID-19 outbreak contributes to 24% growth in users
 Figure 16: Twitter monetizable daily active users (mDAU), 2018-20
 Advertising revenue drops as outbreak causes brands to pull back
 Trump tweets get fact-checked
 Plans in the works for option to stop people replying
 Ban on political advertising

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Twitter tests Stories-like feature Fleets

Twitter Topics helps people find the content they want

Major Players – Snapchat

Strong growth over the last year

Figure 17: Snapchat daily active users, 2018-20

Snapchat stops promoting Donald Trump's posts

Wide range of new features announced

The Consumer – What You Need to Know

Growth of Instagram and YouTube continues

TikTok gains greater prominence

Facebook and Instagram are the most frequently used networks

Decline in use of devices other than a smartphone for social media

People want social media to intervene on fake news

Almost half of social media users would prefer platforms not to show the popularity of content

Consumers are in favour of banning political advertising

Ease of content discovery is the greatest priority for younger people

Data security concerns could impact use

Facebook controversies have caused reputational damage

Social Media Networks Used

More than six in ten people aged 55+ use Facebook

Figure 18: Use of social media platforms, 19-30 March 2020

Figure 19: Repertoire of social media networks used, 19-30 March 2020

Growth of Instagram and YouTube continues

Figure 20: Use of top-5 social media networks in the last 3 months, 2017-20

Figure 21: Use of Top-5 social media networks in the last 3 months, by generation, 19-30 March 2020

TikTok gains greater prominence...

...but controversy over censorship and data collection could limit growth

Figure 22: Used TikTok in the last 3 months, by generation, 19-30 March 2020

Frequency of Social Media Visits

People increase use of social media during COVID-19 outbreak

Facebook and Instagram are the most frequently used networks

Figure 23: Frequency visit social media networks, 19-30 March 2020

Figure 24: Frequency visit social media networks [at least once a day], 2018-20

Three in four Snapchat users visit daily

The on-going crisis can limit appeal of social media for some

Figure 25: Whether people feel uncomfortable doing selected activities, 21 June – 1 July 2020

Social Media Devices

Decline in use of devices other than a smartphone for social media

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Social Media: Inc Impact of COVID-19 - UK - July 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Devices used for social media, March 2018, March 2019 and 19-30 March 2020

Figure 27: Preferred device for social media, March 2018, March 2019 and 19-30 March 2020

Mobile livestreaming being used to set Facebook Gaming apart

Attitudes towards Social Media

People want social media to intervene on fake news

Figure 28: Attitudes towards social media, 19-30 March 2020

Figure 29: Attitudes towards social media [Answered Yes], by generation, 19-30 March 2020

Removing public popularity scores could embolden people to post more

Consumers are in favour of banning political advertising

Social Media Priorities

Ease of content discovery is the greatest priority for younger people

Figure 30: Top reasons choose a social network over another, 19-30 March 2020

Figure 31: Top reasons choose a social network over another, by younger generations, 19-30 March 2020

Many are considering the mental health ramifications of social networks

Fewer adverts could make a difference for platforms

Data security concerns could impact use

Perceptions of Social Media Platforms

Facebook controversies have caused reputational damage

Figure 32: Correspondence Analysis on social media platforms, 19-30 March 2020

Figure 33: Social and Media Networks, March 2020

YouTube considered the best for making money

People don't think social media is currently a very helpful shopping tool

COVID-19 presents opportunity for networks to further e-commerce role

Appendix – Data Sources, Abbreviations and Supporting Information

Methodology

Abbreviations

Consumer research methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com