

NOVEMBER 2020

TikTok User Report: UK Edition

# Key Trends for Marketers

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vidmob



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# Our first ever in-depth survey of UK TikTok users, this report highlights why people use the social app, how they interact with it and implications for brand marketers.

VidMob conducted this survey to learn more about who's actively using TikTok in the UK, the content or formats they find most appealing and the extent of consumer trust in the brands they encounter.

## We'll present key insights like:

- + The app is more than just a social network. It's fast becoming an entertainment channel of choice for many, especially younger adults, as well as a place to engage with motivational and uplifting forms of content.
- + As a result, people's interaction with content on the app, especially ads, looks very different from how they typically engage with creative elsewhere. That's most apparent when you compare how people of different ages use the app.
- + For brands, this is an opportunity to reimagine or reinvigorate their relationship with both prospective and existing customers across the UK.

This presentation summarises key findings from VidMob's recent survey of UK TikTok users in the UK.

For more insights, to ask us a question about this data, or to learn how to make a creative impact on any channel, visit

VidMob.com →

or email us at  
[info@vidmob.com](mailto:info@vidmob.com)

Hungry for more key stats?  
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## Study Methodology

This report is based on data from an independent survey conducted by YouGov in August 2020, of 1000 existing TikTok users in the UK, aged 18-40.

We factored frequency of engagement into our survey and results to focus on users who access the app at least once a week or more.

Survey respondents were asked to share responses based on their current and expected behaviour on the app looking ahead to 2021.

To provide insights into both generational, and age-related trends, we have analyzed the data both ways:

- + This analysis is based on Gen Z users, aged 18-24, and millennials, aged 25-39, with a total sample size of 968.
- + An additional 32 respondents, aged 40, are factored into charts showing users by age range.
- + For a more detailed breakdown of users by age and by region, see below:
  - By age: 18-19 = 162, 20-24 = 276, 25-29 = 235, 30-34 = 145, 35-40 = 182
  - By region: London = 151, South = 212, East = 100, Midlands = 152, North = 226, Wales = 39, Scotland = 97, N. Ireland = 23.

## How to use this report

**A new way to enjoy video, and social interaction, making an impact on TikTok as a brand starts with understanding what sets it apart from other apps, ranging from its native video formats to differences in user behaviour.**

For marketers, with country-level user data in relative short supply outside of TikTok's top 3 markets, making the most of the app has been a bit of a guessing game.

So, to remedy that, we asked a wide cross-section of UK consumers who regularly use the app about what keeps them coming back for more.

Next, we looked at how user behaviour changes across the country.

## What it means for marketers

These findings provide valuable insights for marketers looking to see how gender, age or user location impact what people watch or purchase.

Use these insights to hone in on the right creative strategy for your brand in the year ahead.

## Background on this study

**This survey was conducted during the global pandemic of COVID-19 but its findings matter for UK marketers now more than ever.**

### **Industry Context:**

Despite being the newest app on the social scene, launching in 2017 in the UK, TikTok has already captured the attention of a wide cross-section of mobile users around the country. Fast forward to today and 2020 has been a year of record-breaking downloads, ownership changes and increasing government scrutiny for the app around the world.

We wanted to explore what that means for brands as much as consumers.

### **So what's going on?**

A surge in downloads of the app in markets such as the US, alongside the UK, have highlighted how a whole new generation of digitally-connected, mobile-first users are taking to the app.

### **That makes sense because:**

Teenagers and young adults have been stuck at home this year, with their families at home at the same time and privacy a hot topic right now, young people are looking to their mobile and digital devices as a way of maintaining their privacy while staying socially connected.

TikTok's ease of reposting content to other networks helps them to do that more efficiently while the app's algorithm is also designed to surface content that keeps people engaged.

The app's native video format encourages longform storytelling (a key opportunity for brands) that's turned the app into an entertainment network in its own right.

By hosting lots of events like #HappyAtHome:Live!, TikTok has actively capitalised on homegrown content formats this year as a means of connecting and growing its global community.



# TL; DR

## 01

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67% of TikTok users either expect to maintain or increase their usage of the app in the coming year, especially male millennials and Londoners.

## 02

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Male millennials are also more likely to participate in hashtag challenges and Livestreams than their Gen Z counterparts.

## 03

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Gen Z users typically share or save the most videos but two thirds of millennials do so occasionally or on a regular basis too.

## 04

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Gen Z are the most influenced by the content a brand publishes while male millennials typically follow the most brands.

## 05

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A brand's purpose and alignment with perceived 'good' causes drives consumer buying behaviour, most notably among women aged 18-24.

## 06

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1 in 4 users are open to buying things on TikTok as a result of seeing brand videos.

# TikTok usage in the UK





## TikTok is widely used by adults of all ages in the UK, especially in London.

- + Despite being the newest app on the social scene, launching in 2017 to the UK market, TikTok has already captured the attention of a wide cross-section of mobile users around the country.
- + We wanted to learn more about who's using the app, their age and location. In particular, we were looking to see how widely used it is by different age groups, genders and see if geography plays a role too.

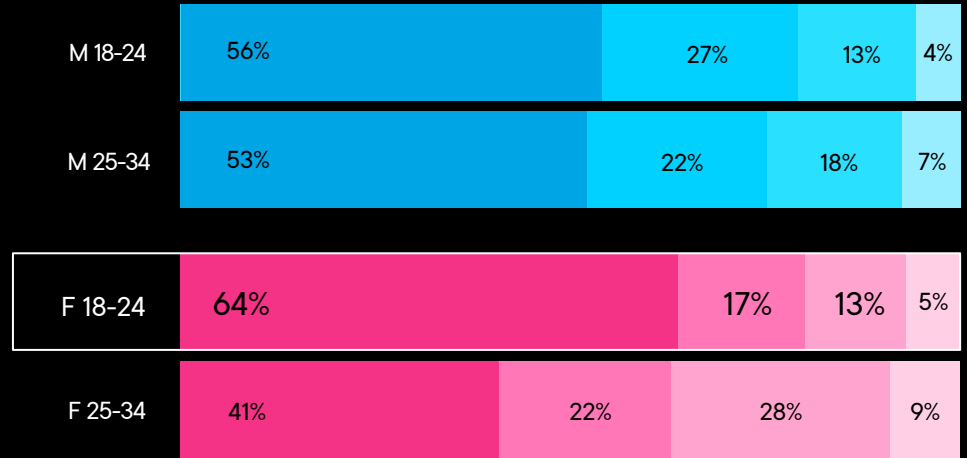


# Who uses TikTok the most?

TikTok is widely used by adults of all ages in the UK.

82% of users under 25 use the app once a day or more frequently.

Females 18-24 are the heaviest users, with 64% logging in multiple times per day.



Multiple times /day



Once /day



A few times /week



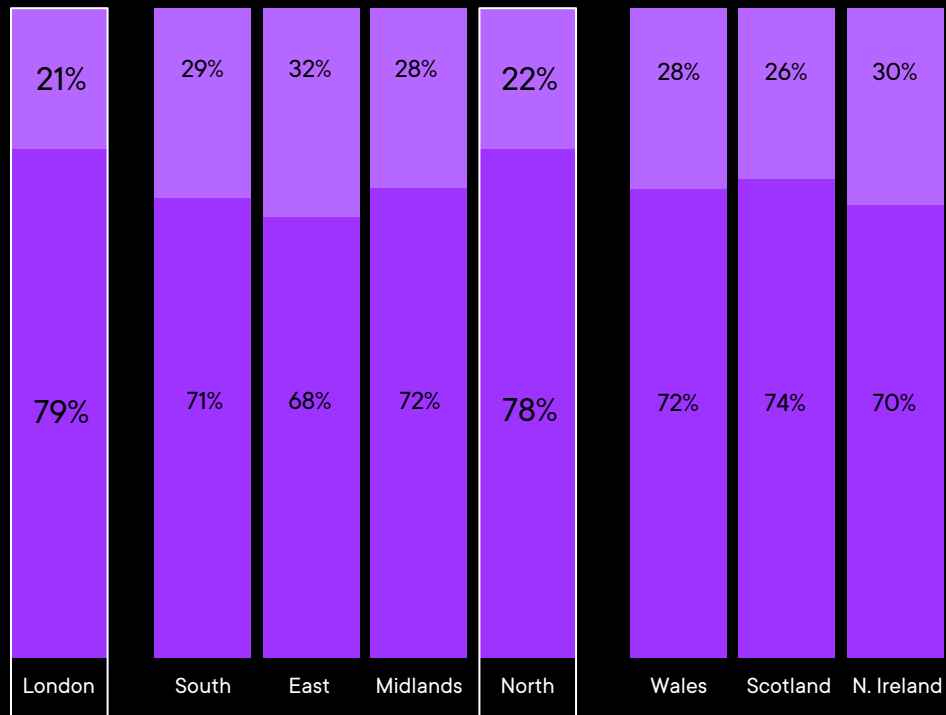
Once /week

*Q: On average, how often, if ever, do you use the TikTok app to watch videos?*

# Where do they live?

Users in London and the North of England typically access TikTok the most.

Those in the East use TikTok less frequently.



*Q: On average, how often, if ever, do you use the TikTok app to watch videos?*

Heavy users
  Regular users

# What other apps do people use?

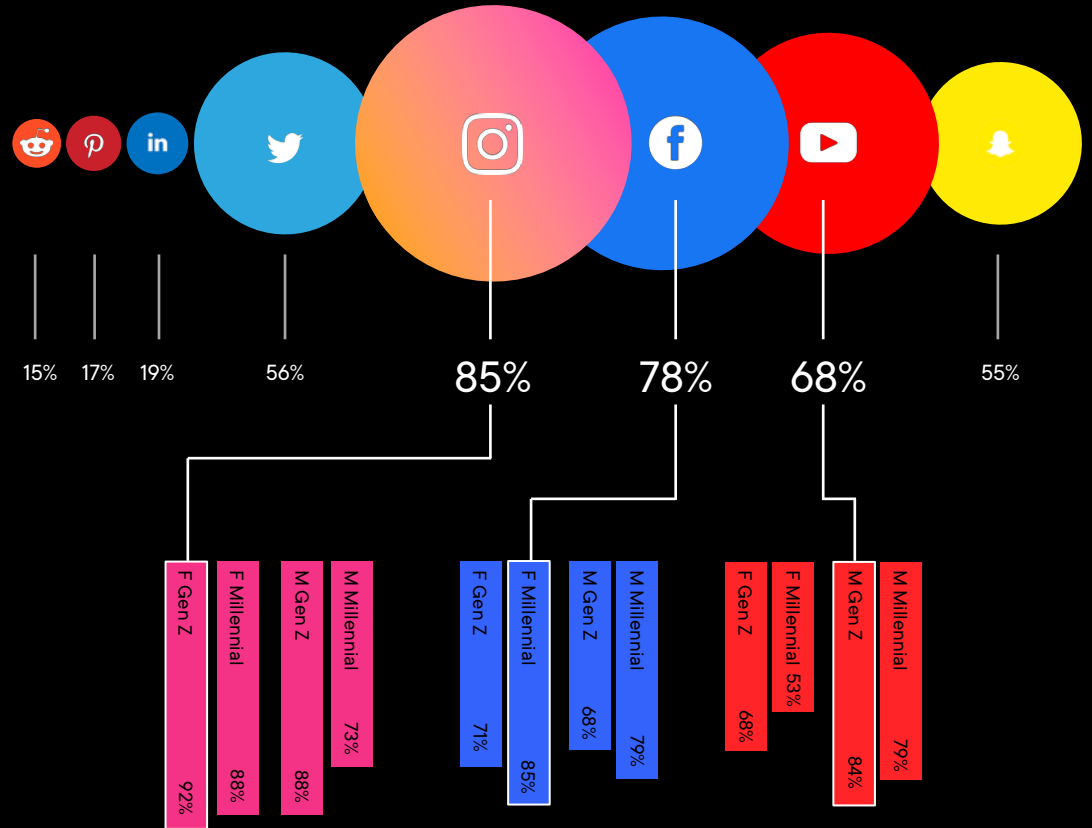
The most engaged Gen Z TikTokers also use Instagram and Snapchat every day but male Gen Z'rs are also loyal to YouTube.

Millennials are still highly active on Facebook with men also drawn to YouTube and Twitter.

## WORTH NOTING:

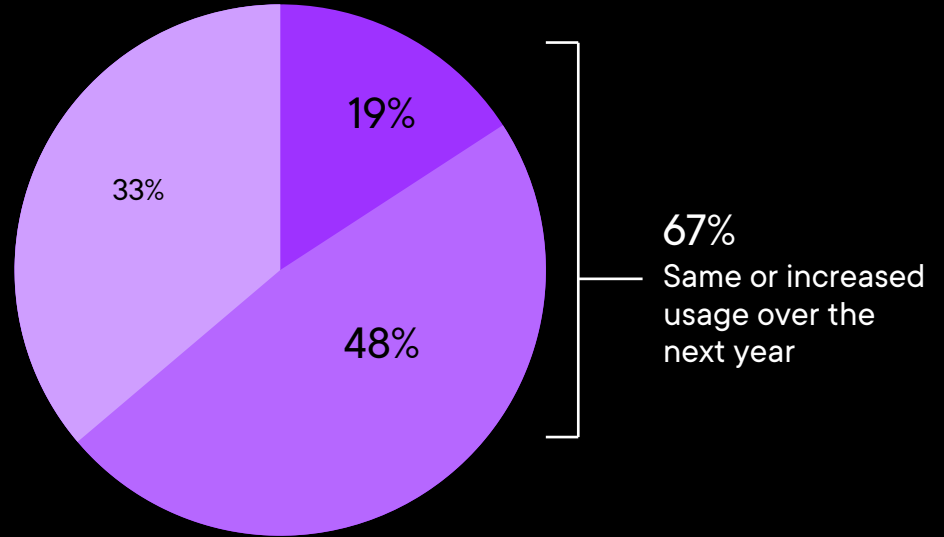
This data corroborates our findings in the latest VidMob State of Social Report, showing frequent areas of overlap across social apps.

Q. Besides TikTok which, if any, of the following apps do you use on a regular basis (i.e. at least once per day)?



# How will usage change in 2021?

Two thirds of TikTok users expect their usage to stay the same or increase in the next 12 months.

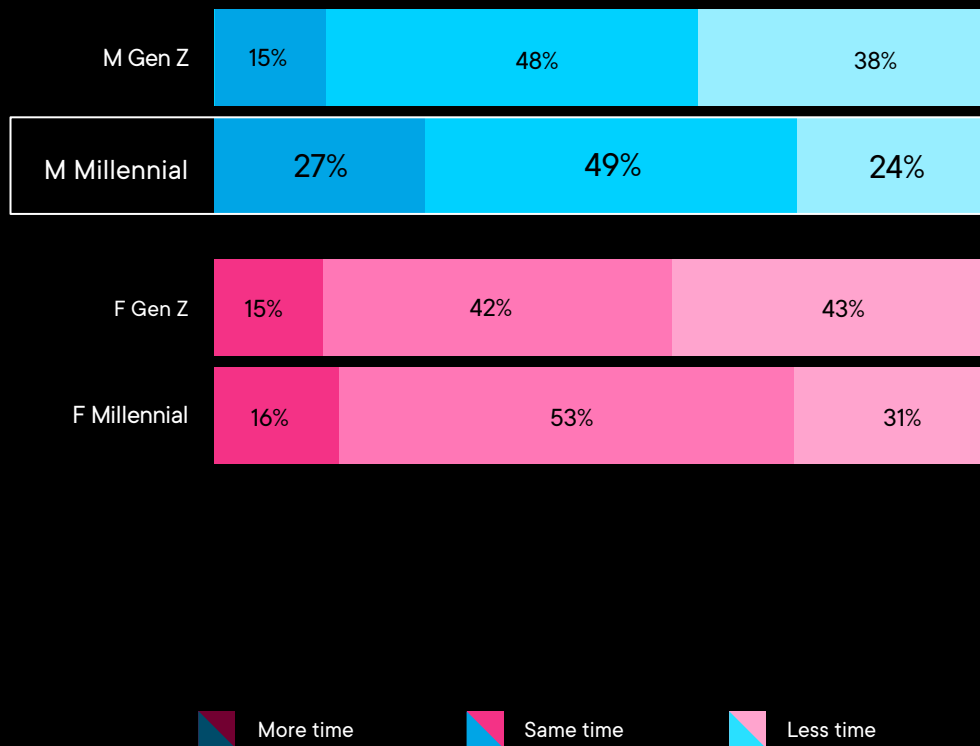


More No change Less

*Q. Looking ahead, how much, if at all, do you think your usage of TikTok will change within the next year (i.e. until sept 2021)?*

# Who will spend more time on TikTok next year?

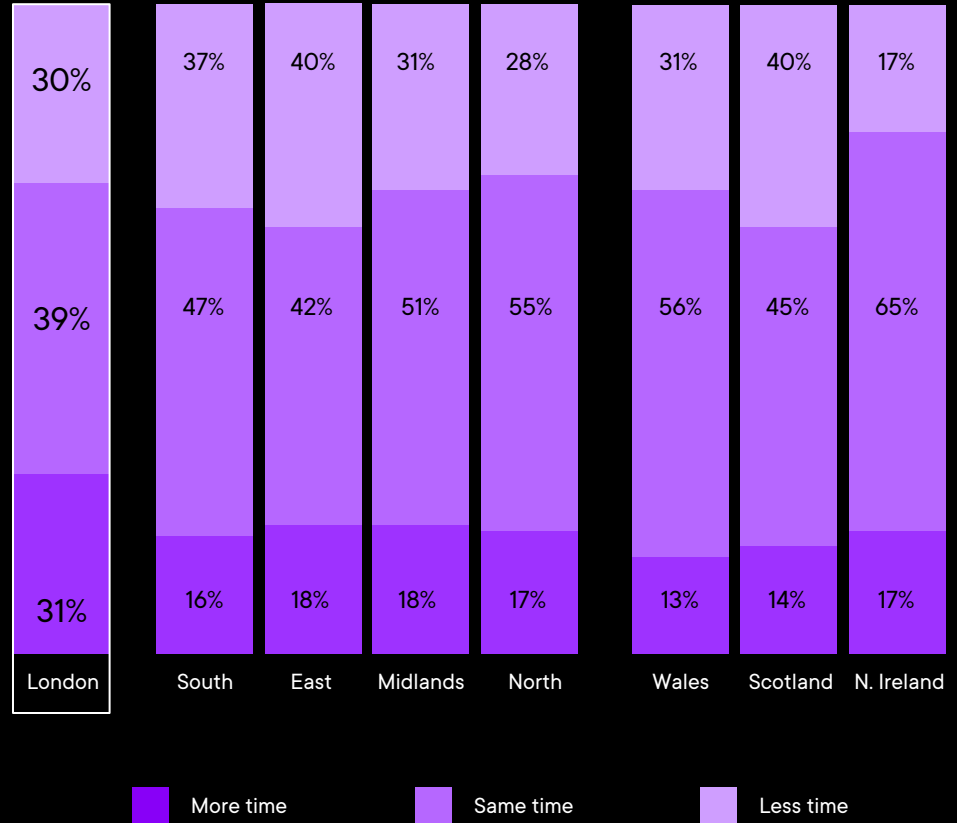
Millennial men are the most likely to spend more time on the app in 2021.



*Q. Looking ahead, how much, if at all, do you think your usage of TikTok will change within the next year (i.e., until September 2021)?*

# Which parts of the country will see the most user growth?

London is set to see the greatest increase in users over the next 12 months.



*Q. Looking ahead, how much, if at all, do you think your usage of TikTok will change within the next year (i.e., until September 2021)?*

# It's not who you know, it's what you see





**More than just social, our survey shows TikTok is a popular entertainment medium for mobile users of all ages, especially those aged 35 and under, to watch videos.**

- + Crucially, at a time when many younger users are reportedly feeling socially isolated due to the restrictions in place as a result of COVID-19, TikTok's video content and social sharing features are an opportunity to feel connected to the outside world from the comfort of their own homes (and phones).
- + Despite public wariness about the UK government's planned use of people's mobile data, and the global legislative furore surrounding the company, TikTok's growing local popularity shows users place their trust in the app to manage their privacy effectively.

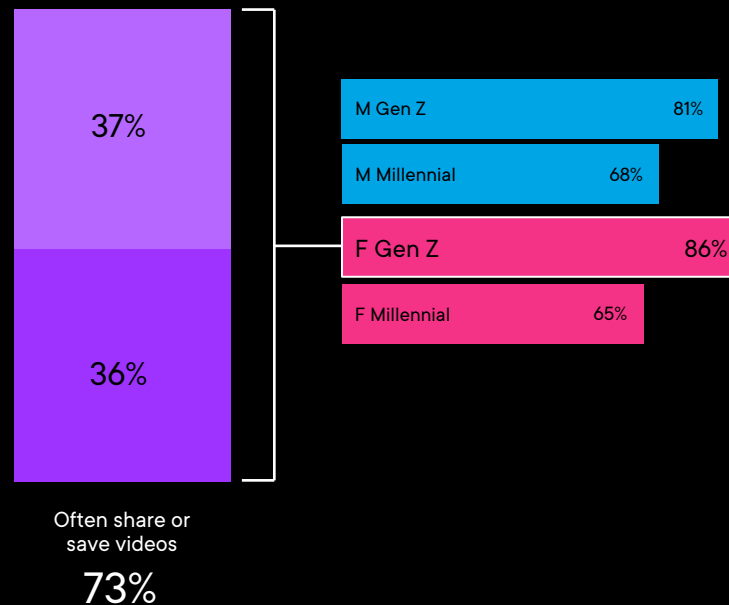


# Who engages the most with TikTok videos?

Three quarters of TikTokers in the UK often share or save videos.

Two thirds of millennials and over 80% of Gen Z do so sometimes or frequently.

*Q. How often, if ever, do you typically save or share the videos you watch on TikTok?*



Frequently

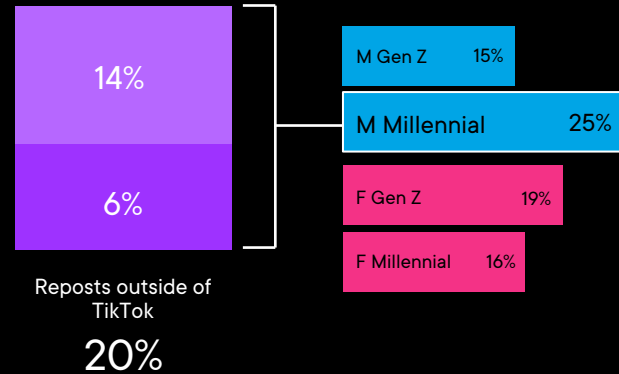


Sometimes



# Who reposts the most videos?

1 in 5 users surveyed repost videos to other social media apps.

1 in 3 men aged 35+ sometimes or regularly repost TikTok videos to other social networks, more than anyone else.



Q. How often, if ever, do you typically post videos you watch on TikTok to other social media apps?

 Frequently  Sometimes

# Where are they?

Three quarters of users in London, the East of England, Wales and Scotland frequently share or save videos.

#### WORTH NOTING:

Despite less frequent visits, our data suggests users in the East of England, Wales and Scotland typically engage more with content on the app.

*Q. How often, if ever, do you typically post videos you watch on TikTok to other social media apps?*



■ Frequently or sometimes

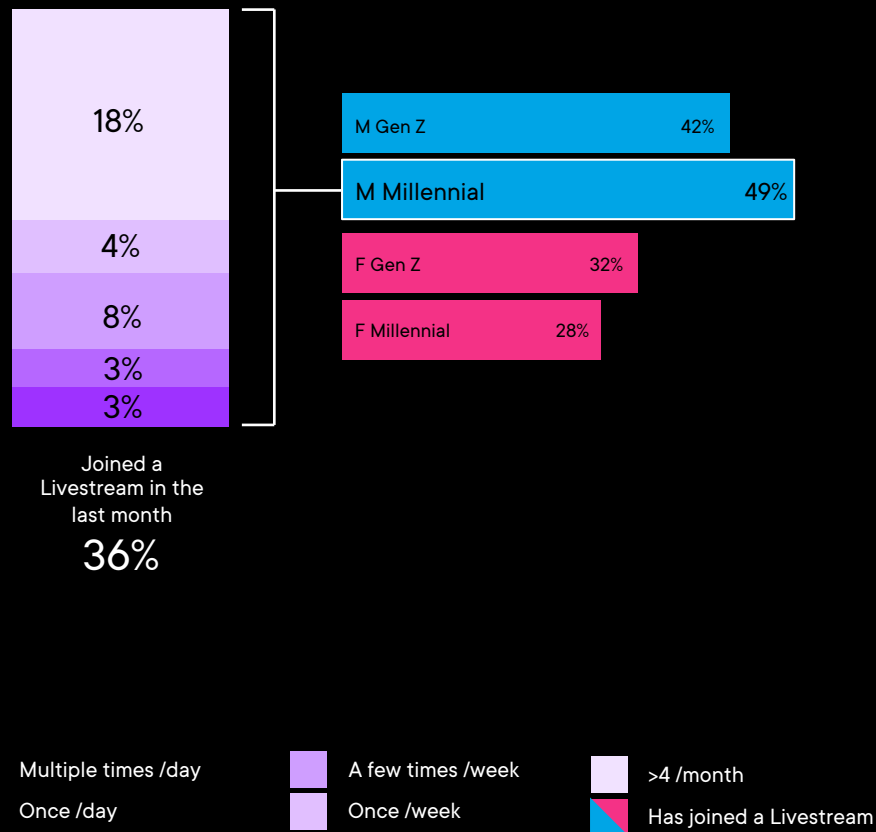
# How popular are Livestreams?

Over a third of active users have joined a Livestream in the past month.

#### WORTH NOTING:

Love or hate them? 50% of those surveyed have never joined a TikTok Livestream but 1 in 10 men aged 35-40 do so multiple times a day.

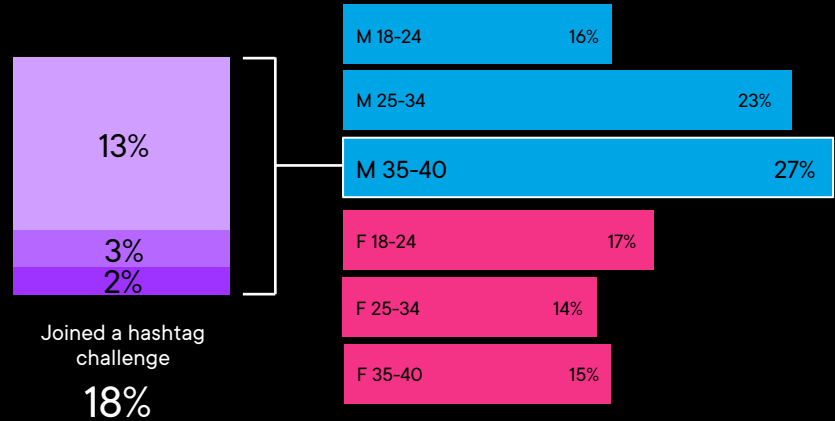
*Q: How many times, if ever, have you joined a TikTok Livestream (i.e., online streaming of a video in real time) in the past month (i.e., since early August 2020)*



## ...And hashtag challenges are just that; challenging

Only 1 in 5 TikTokers have participated in a hashtag challenge but older male millennials (35+) take part the most.

As this is a relatively new content format, it's likely to grow in popularity.



Q. How many times, if ever, have you ever participated in a hashtag challenge on TikTok?

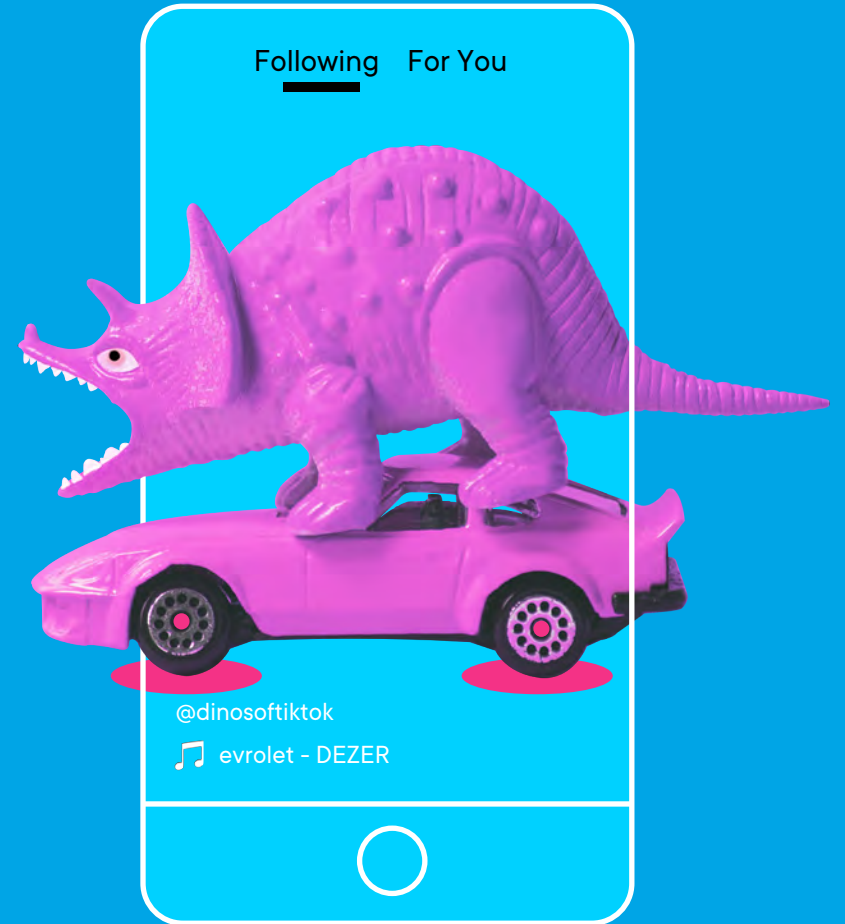
10+ times

6-10 times

1-5 times

Has joined a hashtag challenge

# Most Popular Content



It's been a tough year. So funny videos are popular, **we get it.**

But what else captures people's attention **and why does that matter for brands?**



**At a time of dramatic social upheavals and global outcry over racial, gender- or sexual orientation-based discrimination, TikTokers in the UK overwhelmingly choose to engage with content related to social activism and ‘goodness.’**

**What kind of videos are Tiktokers drawn to?**

- + Turns out users of all ages share similar preferences when it comes to their favourite videos, with funny content the most popular of all.
- + For brands, it’s worth noting that TikTok’s own algorithm factors these preferences, based on user engagement and video completions, into what people discover on the app and ultimately watch.
- + This creates a positive feedback loop for content, with trending videos actively influencing subsequent trends and video discovery for all users, regardless of the size of their social circle on the app.



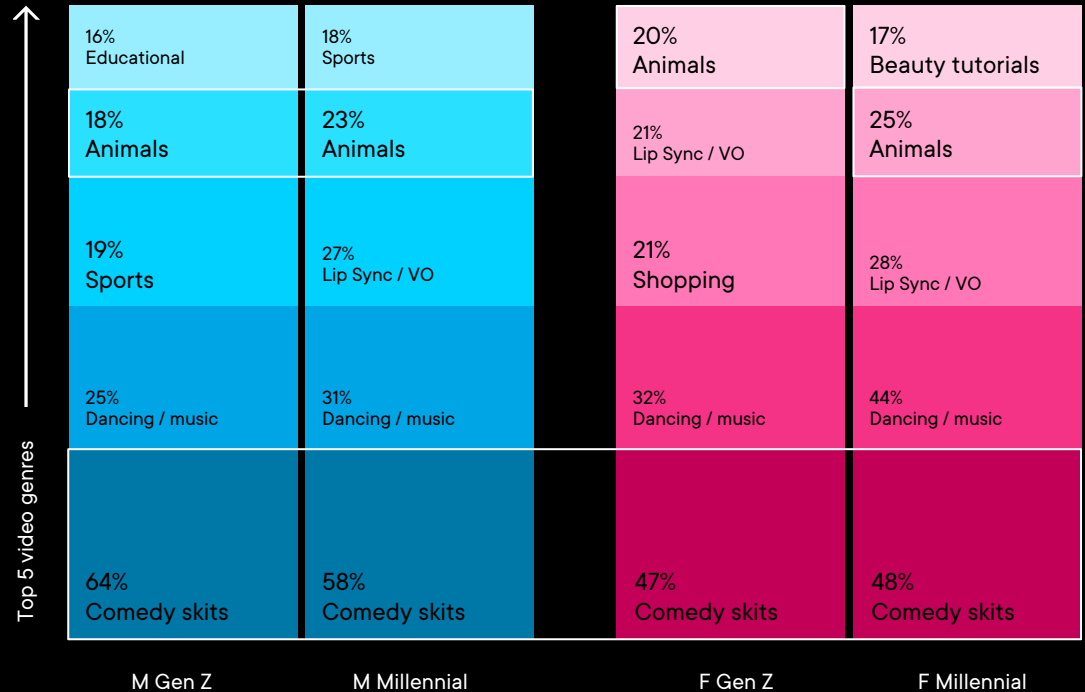
# Popular content

Unlike other social apps, TikTok is all about audio and visual effects, which fuels the popularity of its music snippet format. Users can't get enough of dancing, singing and lip-syncing.

But cuteness counts too. Everyone ranked animal videos among their top 5 favourite video genres to watch.

Men are also drawn to sports-related content while women tend to gravitate more towards beauty, shopping and fashion-related videos.

Q. Which of the following types of TikTok videos do you watch most frequently?



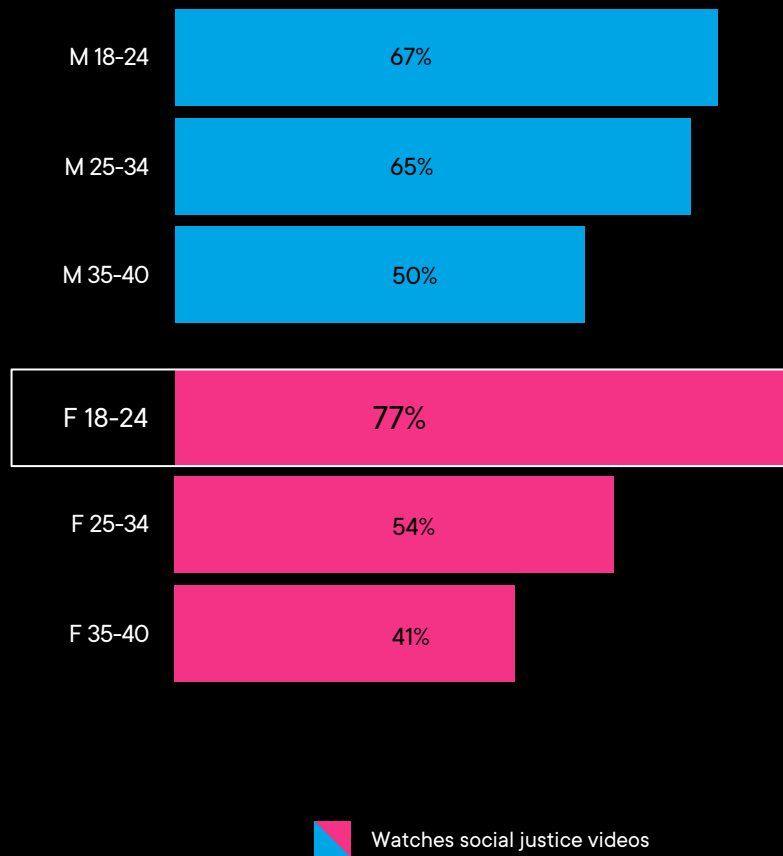
# TikTokers also care about social causes

Users from every generation are interested in watching videos related to social causes, activism or charities.

#### WORTH NOTING:

On average, over half of those surveyed have watched video content of this nature, along with 8 in 10 Gen Z women.

*Q. Do you watch videos about social movements, charity-related causes or social activism on TikTok? Chart shows data from those users who responded positively.*



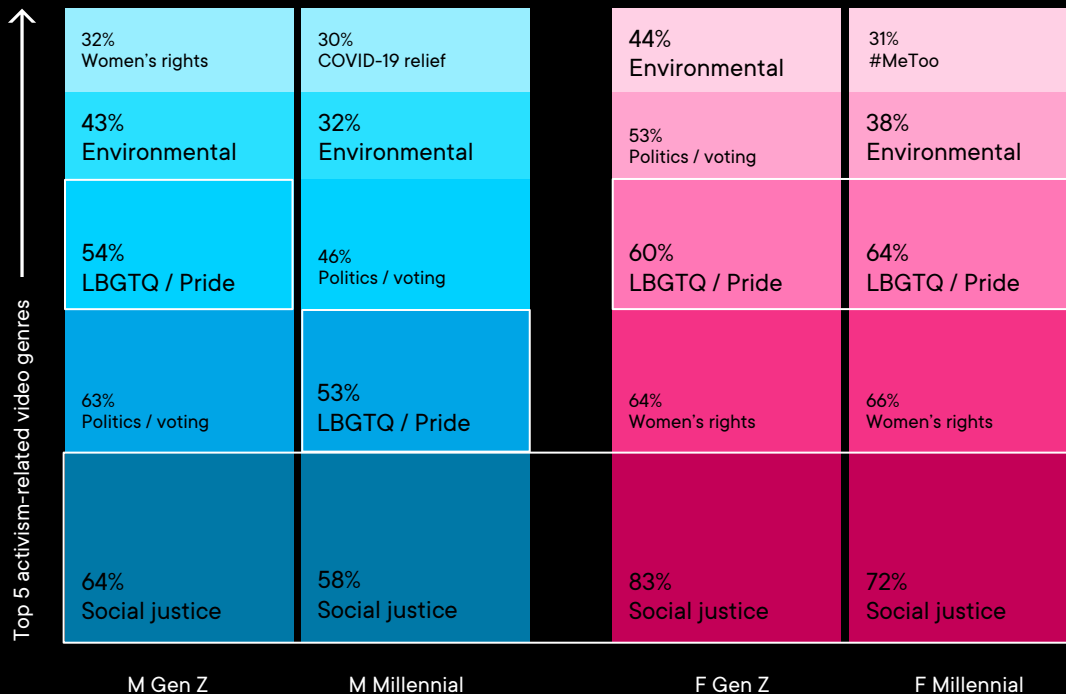
# Young people are big on social justice

LGBTQ and pride-related content also has wide appeal, as do videos about the environment.

#### WORTH NOTING:

For brands on the app, these results show that featuring real-life issues in videos engages viewers rather than drives them away.

Q. Which, if any of the following types of videos about social movements, non-profit causes or activism do you watch on TikTok?



## Key Takeaway: Your audience = Your content

### 01

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Our survey results show demographics impact people's reactions to video content on TikTok.

### 02

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Securing views and engagement means factoring in these differences alongside broad demand for certain video genres.

### 03

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Emotional resonance and a connection to real-life events are also key.

### 04

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The bottom line? For brands, being authentic and socially engaged in your videos is as important as being entertaining.

# The Power of Purpose



@WeMarchin

🎵 n't breathe -H.E.



## How do users in the UK feel about brands on TikTok? For marketers, how does brand alignment with good causes or hot topics impact user perception and purchase intent?

- + Our results show people currently follow fewer brands on TikTok than other social networks. However rapid user growth in 2020 and the opportunity to engage a new generation of fans makes the app a choice destination for brands:

Millennials, especially men, are the most likely to follow brands, while Gen Z remains a generation to engage.

Half of user purchases are driven by brand content and our survey shows brand purpose heavily influences the spending habits of Gen Z women.

- + So what does that mean for brands looking to engage their fans on TikTok?

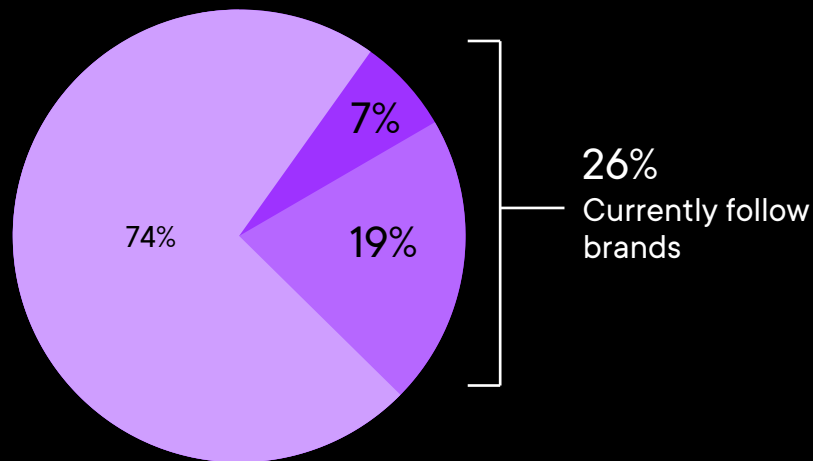
Video offers a unique opportunity to build brand awareness through entertainment and generate purchases with authentic, positive storytelling.

If that storytelling happens to align with causes users care about, all the better, and all the more likely to drive sales for you.



# Most TikTokers in the UK don't currently follow brands

TikTok is a huge area of opportunity for brands looking to engage fans in the UK.



Q. How many brands, if any, do you follow on TikTok?



Follow 5+ brands



Follow 1-5 brands

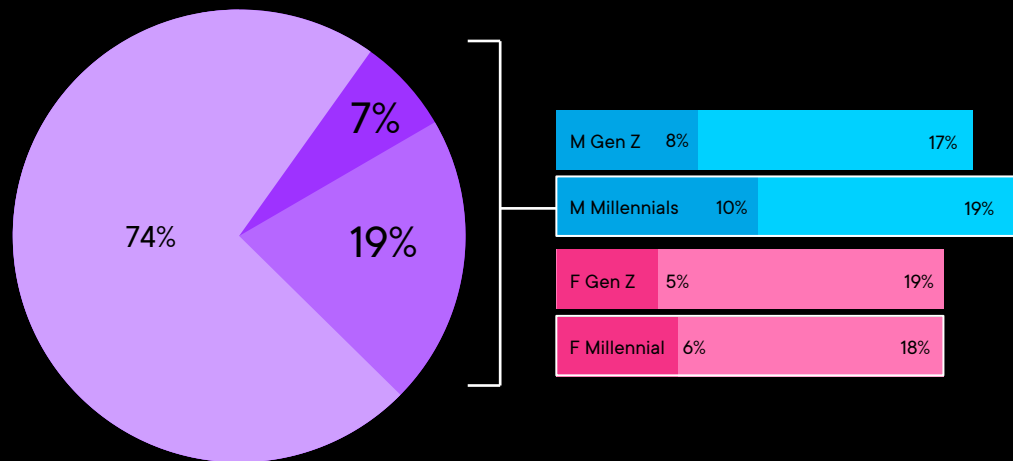


Follow 0 brands



# Millennials are the most engaged with brands

Of those who follow brands on TikTok, millennials are more likely to do so than Gen Z.



Q. How many brands, if any, do you follow on TikTok?



Follow 5+ brands



Follow 1-5 brands



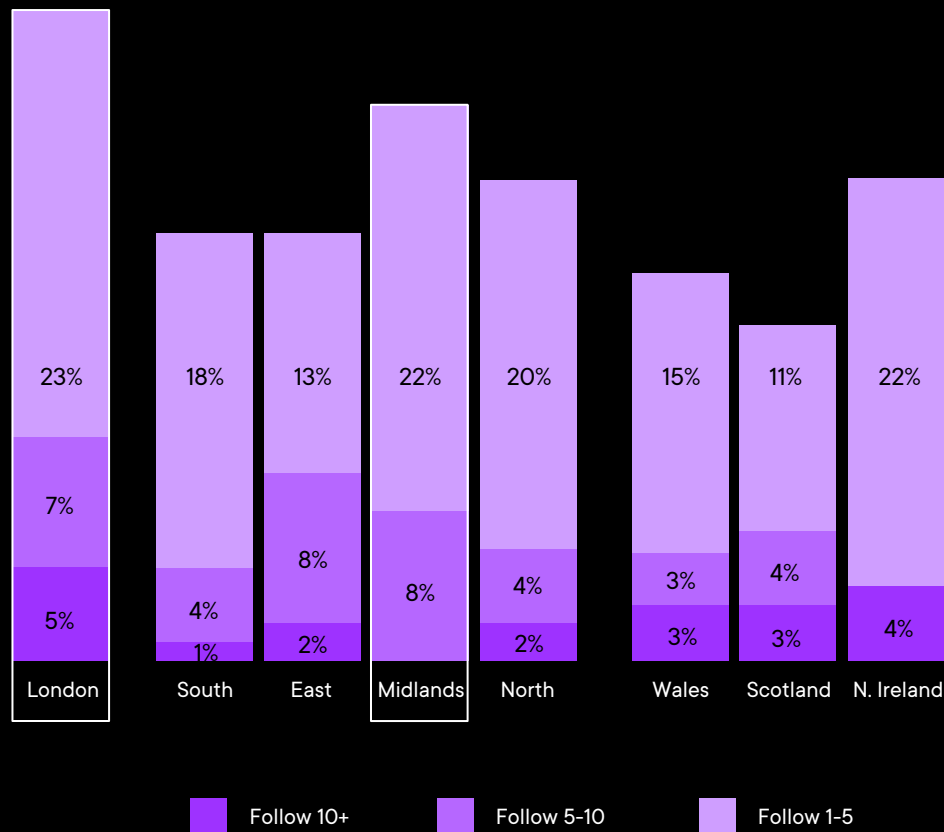
Follow 0 brands

# Does geography influence brand engagement?

On the whole, those in the Midlands tend to follow brands more often than those in other regions.

Meanwhile, Londoners typically follow the most brands.

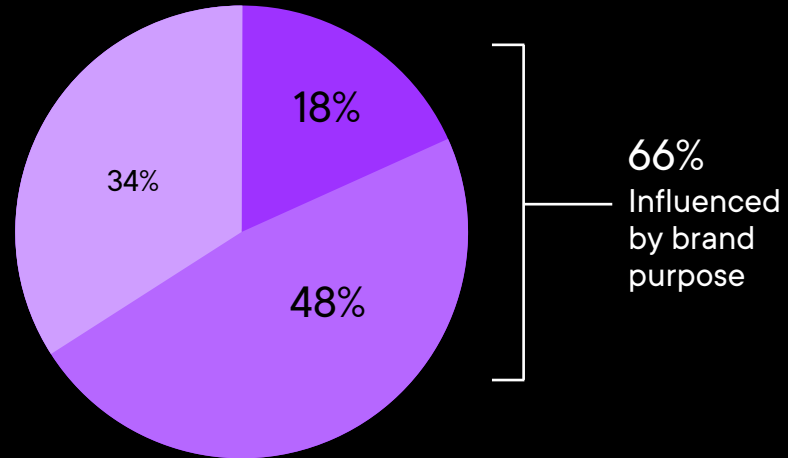
Q. How many brands, if any, do you follow on TikTok?



# Your cause, your consumer

Two thirds of TikTok users say they're influenced by a brand's purpose and its alignment with social causes, activism, or charities when it comes to buying its products or services.

For brands, this is an opportunity to use content as a means of engaging consumers and driving conversions too.



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*Q. In general, how much, if at all, does a brand's purpose, or connection to social movements, non-profit causes or activism influence your interest in buying its products or services?*

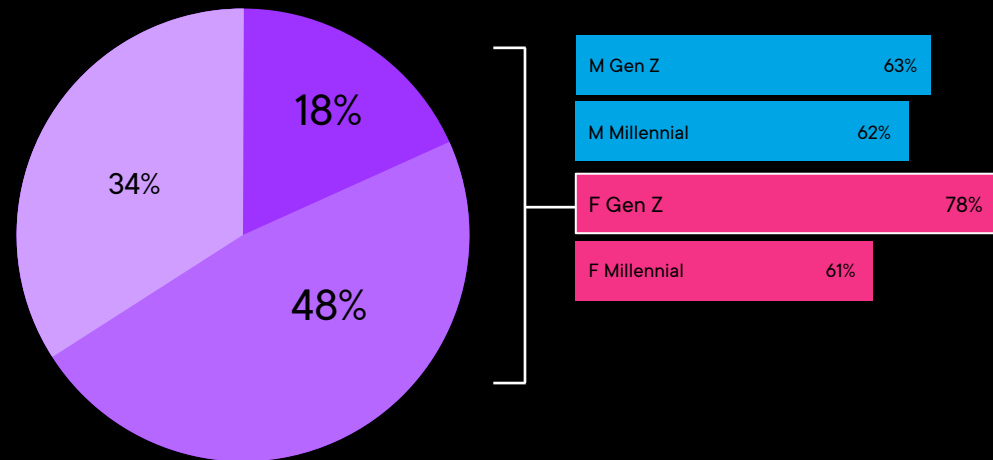
A lot

A little

Not at all

# Especially Gen Z Women

Gen Z women are the most likely to say their buying decisions are tied to a brand's purpose.



*Q. In general, how much, if at all, does a brand's purpose, or connection to social movements, non-profit causes or activism influence your interest in buying its products or services?*

A lot
  A little
  Not at all

# Drivers of Purchase Intent

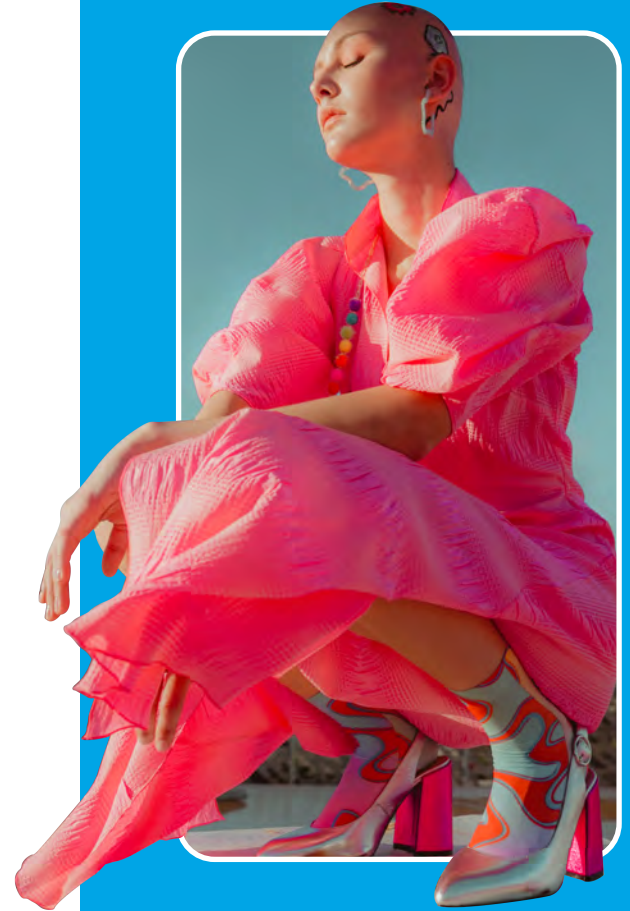


@tigerkinging

🎵 itty kat – smashi

## TikTok's video content is changing the rules of the game when it comes to people's spending decisions.

- + It's early days for ads on TikTok but there is a clear trend emerging, with male millennials showing the greatest propensity to click and buy.
- + Videos are an opportunity for brands to build impactful relationships with fans and to drive sales.
- + With the app's algorithm measuring relevance based on video views, completions, and overall user interactions, crafting compelling content that keeps users watching is the key to generating impressions as well as engagement.

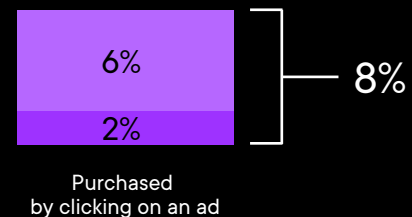
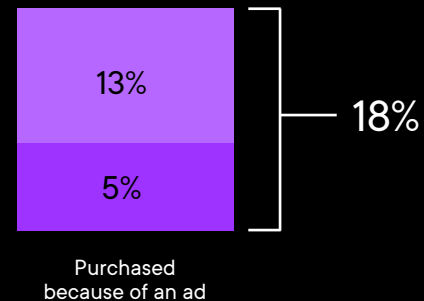


# For brands, there's plenty of room for growth on TikTok

1 in 5 UK users bought something as a result of seeing an ad on TikTok, though fewer clicked directly on the ad.

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Q. Approximately how many times, if ever, have you made a purchase because of an ad you saw on TikTok? Q. And approximately how many times, if ever, have you ever made a purchase directly on the TikTok app by clicking an ad?



5+ times

1-5 times

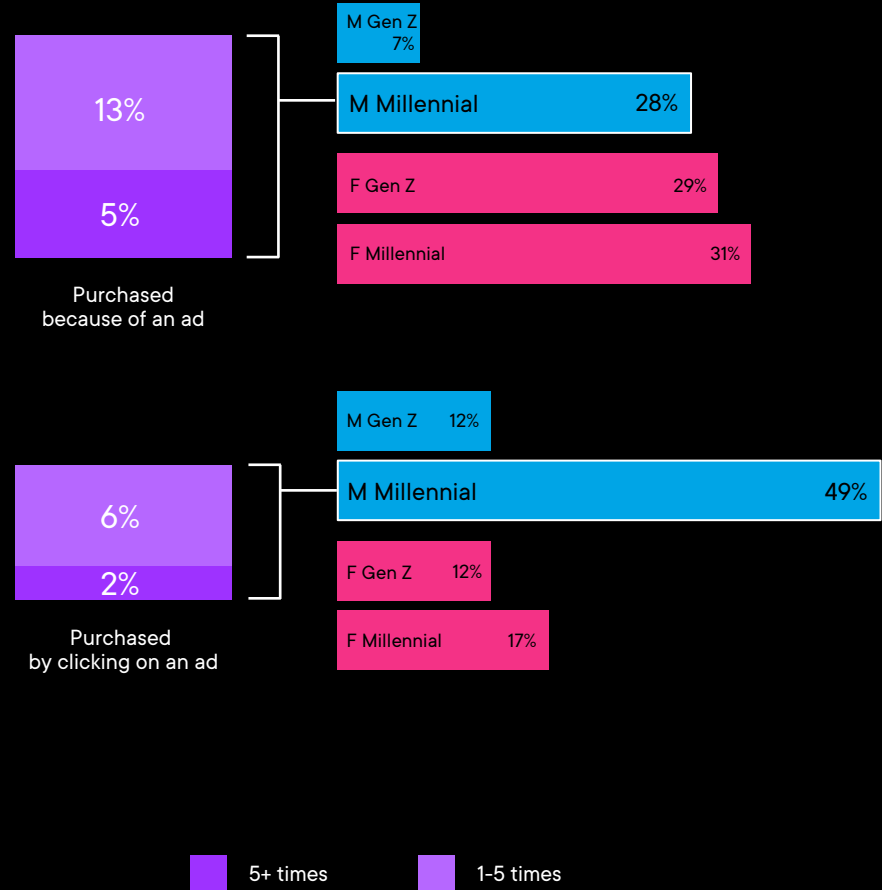
# Male millennials are the most likely to purchase in-app

Rapid user growth and people's strong affinity with purposeful brands is likely to boost in-app sales over the coming year, especially with Gen Z.

## WORTH NOTING:

Gen Z males are the least likely to have bought something after seeing an ad. This is a strong area of opportunity for brands looking to engage a new generation of shoppers.

*Q. Approximately how many times, if ever, have you made a purchase because of an ad you saw on TikTok? Q. And approximately how many times, if ever, have you ever made a purchase directly on the TikTok app by clicking an ad?*





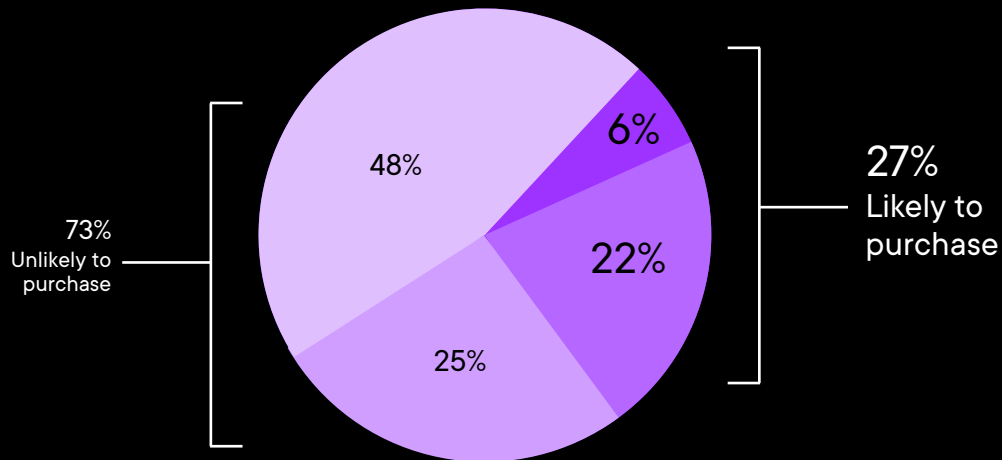
# 1 in 4 users are likely to buy something on TikTok after seeing a video

Now is the time for marketers to build valuable relationships with their fans.

#### WORTH NOTING:

Videos currently drive more sales for brands on TikTok than ads alone.

*Q. How likely, if at all, would you be to make a purchase directly on the TikTok app if you saw a video for a product, service or experience that interests you?*



Very likely

Somewhat likely

Somewhat unlikely

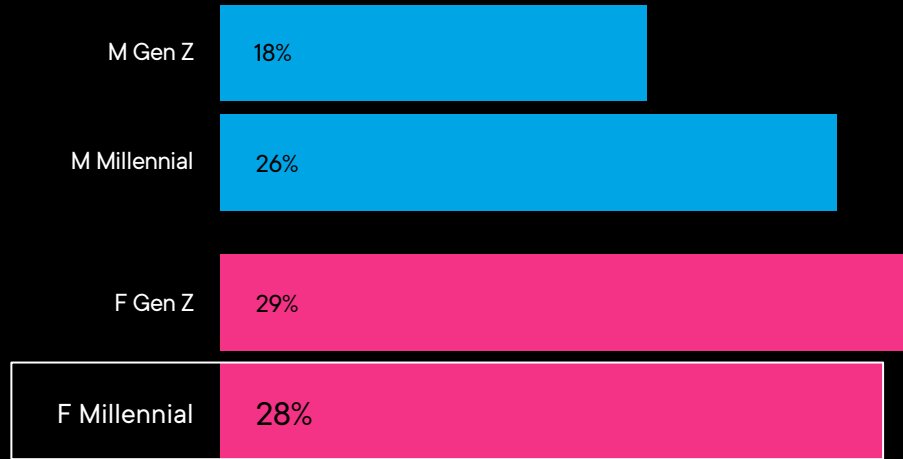
Very unlikely

Of those likely to make a purchase after seeing a related video, millennials are the most likely to do so.

## WORTH NOTING:

There is still significant headway to be made when it comes to converting Gen Z males with video content though, by contrast, Gen Z women show the greatest tendency to make a purchase overall.

*Q. How likely, if at all, would you be to make a purchase directly on the TikTok app if you saw a video for a product, service or experience that interests you?*



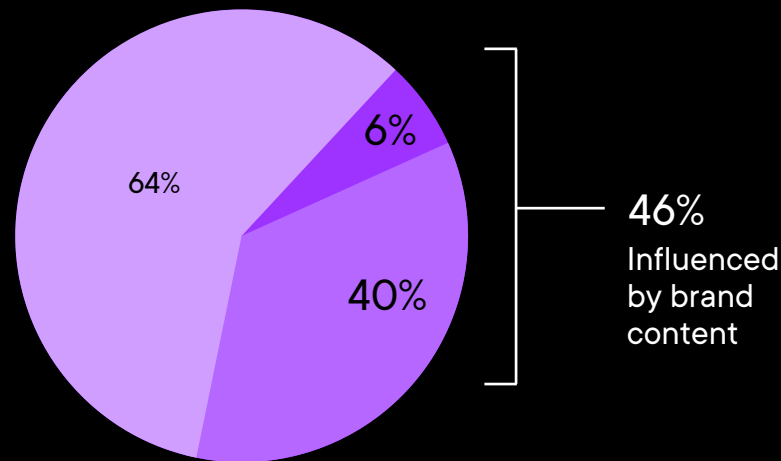
Likelihood of making a purchase

# Half of users are influenced by the content a brand publishes

Despite brand follows being in their infancy on the app, the content a brand publishes still matters to the majority of TikTok users.

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*Q. How much, if at all, does the content a brand publishes on TikTok influence your interest in buying its products or services?*



A lot

A little

Not at all

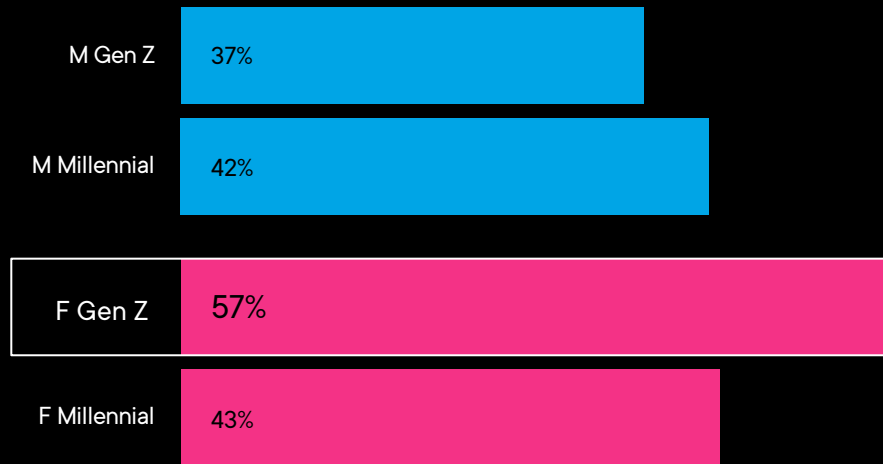
# Especially Gen Z females...

Despite being less likely to follow brands on the app, women aged 24 and under still actively engage with brand content.

They're also the most likely to be influenced by what you publish when making in-app purchases.

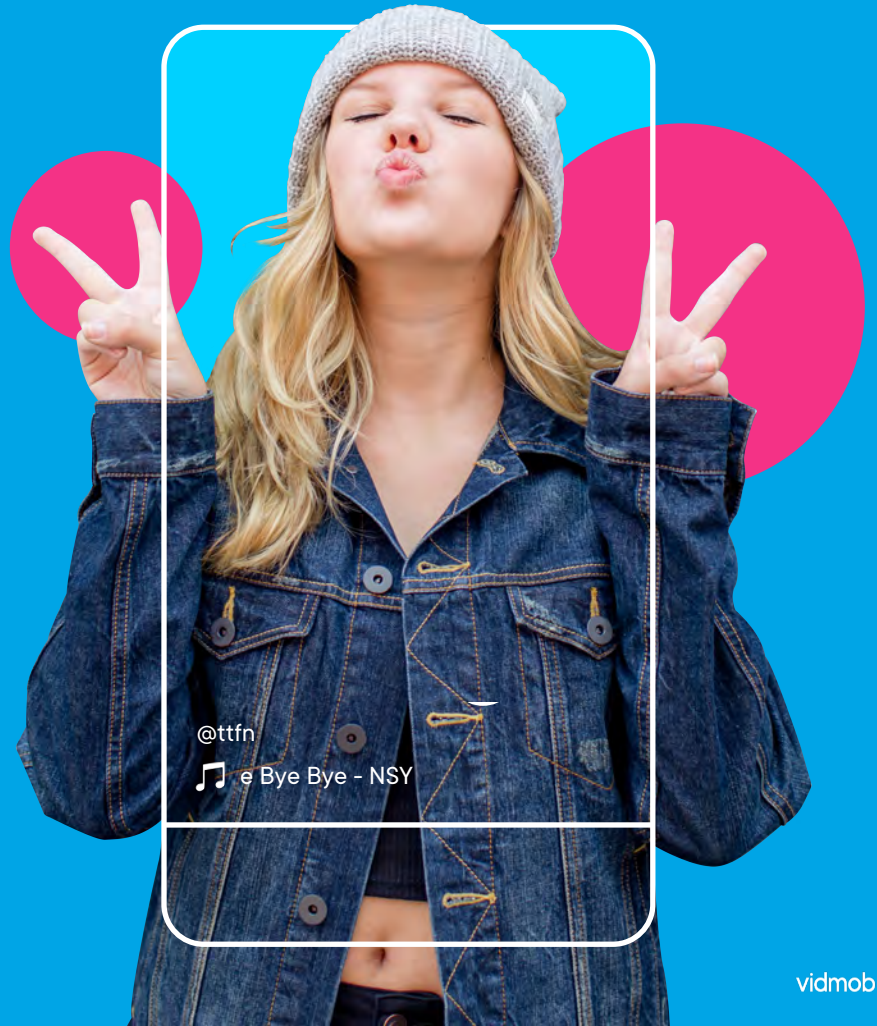
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*Q. How much, if at all, does the content a brand publishes on TikTok influence your interest in buying its products or services?*



Influenced by brand content when purchasing

# In summary



## This year's pandemic has accelerated changes in global digital consumer behaviour that were already underway in 2019.

That's especially the case when it comes to how much time people spend online in the UK and the amount of video they watch, particularly younger generations who've been impacted by the anti-social side of lockdown and quarantines.

Apps like TikTok have benefited from increased mobile screen time as a result, and from the huge upswing in downloads, totaling some 2 billion globally as of this summer.

At the same time, more consumers than ever are choosing to engage with video content across a variety of platforms.

Our findings show TikTok's video content is precisely what makes the app so special for users and brands alike. It's also the format of choice for brands seeking to drive in-app purchases as much as user awareness.

### What does this mean for brands in 2021?

With user engagement set to grow, especially among millennial males, now's the time for brands to invest more heavily in the app.

Engaging users means taking both their preferences for watching uplifting, socially-engaged video content and TikTok's ranking algorithm into account.

That means **creating compelling brand stories worth watching through to completion**, sharing or saving.

Finally, **your brand's purpose can help users connect to the products and services most relevant to them**, particularly for young women.

# Three Key Takeaways

01

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## Particular people:

Brits of every age, and from every corner of the country, use TikTok a lot. How they use the social app varies depending on their age and gender, though (as if we didn't know already) everybody likes a good laugh.

02

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## Plenty of purpose:

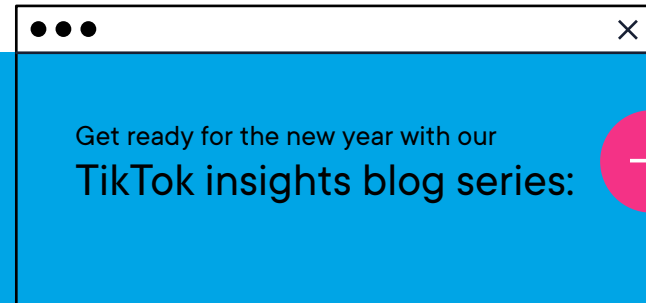
What you say, and how you say it, matters on TikTok. People are more compelled to follow brands or buy something if they've engaged with it or learned about it in a video first.

03

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## Practice plotlines:

TikTok is for entertainment, not just pretty pictures. The most engaging videos feature storytelling that captures users' attention and takes them on a feel-good narrative journey. If that content also helps them to feel more connected to the world and each other in the process, all the better.



# The world's first platform for intelligent creative

VidMob pioneered a technology platform for data-informed creative that provides an end-to-end solution for brands to improve their marketing results.

VidMob is the only company in the world to receive a certified creative marketing partner badge from every major social and digital platform. A portion of every dollar VidMob receives is used to fund pro-bono creative services for charities through its 501(c)(3) VidMob Gives.

Looking for measurably better creative on TikTok? Look no further, we're here for you.

VidMob.com →

Or email us at  
[info@vidmob.com](mailto:info@vidmob.com)

