

# The State of Social Media Marketing in 2022

**Jan. 1, 2021 - March 31, 2022**

Analytics and insights that support the RAB's understanding  
of the advertising space on social media

# Who Is ListenFirst?

## Comprehensive Analytics

Combine the broad landscape of analytics - earned, organic, paid, content, competitive - public & private data - for full picture of performance

## Award-Winning Professional Services

Approach to strategy & service unparalleled - our team understands a customer's business and anticipates needs

## Unique Data Taxonomy

Ability to analyze at macro (parent company) and micro (brand, product level) for 150K+ brands with 7+ years historical data

## Built for Enterprise

Analytics span multiple use cases across an enterprise - campaign planning & tracking, video performance, content development, audience insights

## Actionable Insights

Transform data into insights that inform planning & strategy, social spend, quantifies brand lift and engagement

## Proprietary Benchmarks

Data co-op with aggregated & anonymized private/paid data from 10K+ properties to inform campaign strategy & build KPIs

## Syndicated Measurement

Proprietary metrics used as standard measurement in companies and across industries - Digital Audience Rating, Interest Score, Brand Reputation Index



I. Top Advertiser Trends

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II. QSR Industry Trends & Content Learnings

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III. Retail Industry Trends & Content Learnings

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IV. Auto Industry Trends & Content Learnings

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V. Radio Social Branded Content Analysis

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# Methodology

For this report we analyzed the following brand sets between 2020 and 2022:



All companies included in the Fortune 500



The top 50 fast-food chains in the U.S.



All retailers with a presence in the Mall of America



The top 100 highest-grossing automotive brands

## And how do we define a 'brand'?

A brand is any entity with a social footprint - be that an Instagram profile, a hashtag, or a Wikipedia page. In this instance, for each brand we are measuring their official social presences.

# Metric Definitions

In this presentation we will reference the following metrics:

- **Engagements:** The number of likes, reactions, comments, and shares a brand's posts received. Includes Facebook, Twitter, Instagram, YouTube, and TikTok. Note that YouTube shares is an authorized metric, so is not included in Engagements.



- **Video Views:** The number of video views a brand's video posts received. Includes Facebook, Twitter, YouTube, and TikTok. *Instagram video views are not available publicly.*

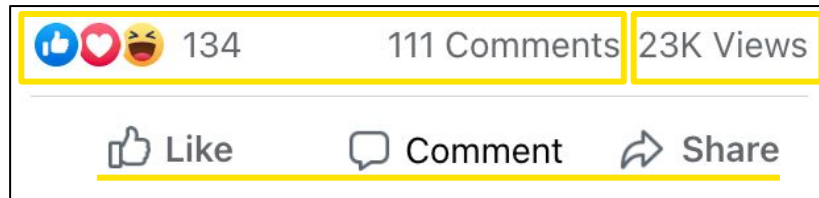


- **Posts:** The number of posts a brand published. Includes Facebook, Twitter, Instagram, YouTube, and TikTok.



1 Post

245 Engagements



23K Views

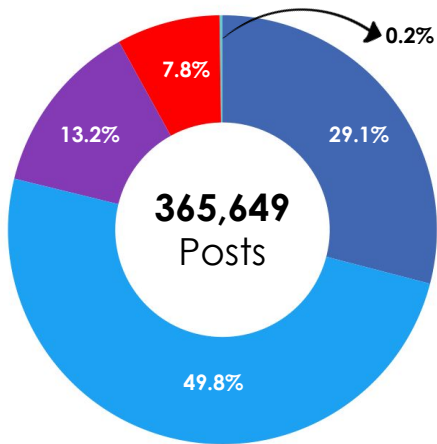
## INDUSTRY TRENDS

In 2021, brands have had to move fast and explore new territories as technology and consumer expectations accelerated at a pace never seen before.

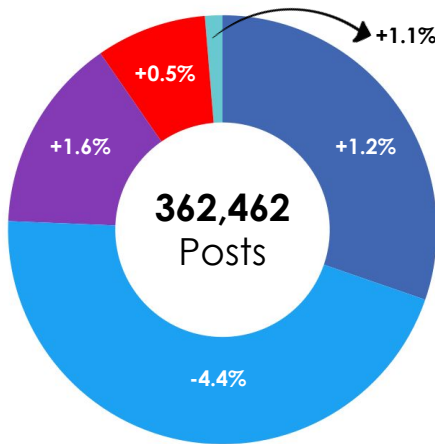
# Only Twitter's share of post volume declined YoY

All other platforms' share rose, with Instagram and TikTok seeing the great increase YoY

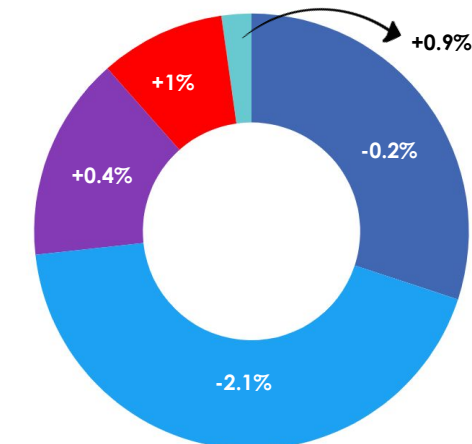
Post Volume by Platform (2020)



Post Volume by Platform (2021)



Post Volume by Platform (Q1 2022)

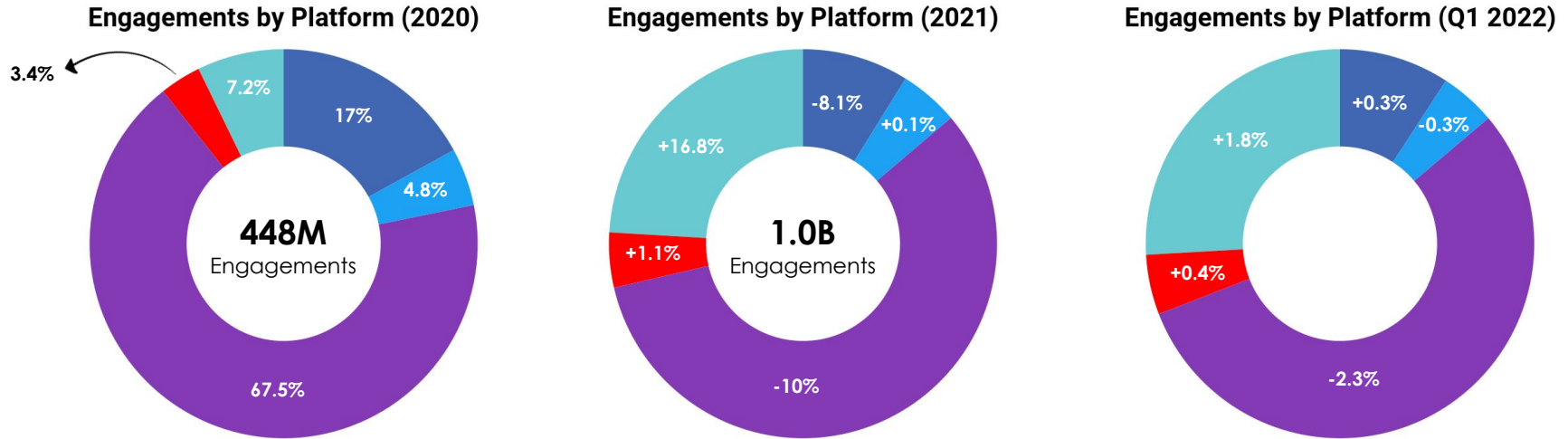


\*Compared to FY2021

● Facebook ● Twitter ● Instagram ● YouTube ● TikTok

# Total engagements jumped by 132% YoY as TikTok grew

Instagram saw the biggest decline in share YoY, impacted by TikTok's growth



\*Compared to FY2021

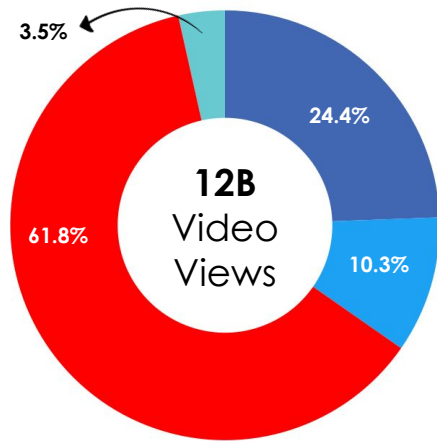
● Facebook ● Twitter ● Instagram ● YouTube ● TikTok



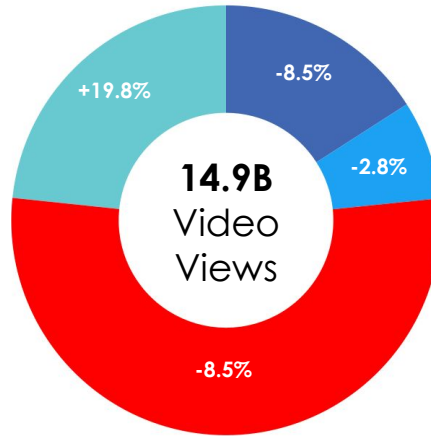
# Views on social videos jumped by +24% YoY

As TikTok viewership grew, this platform ate into the share of views on all other platforms<sup>1</sup>

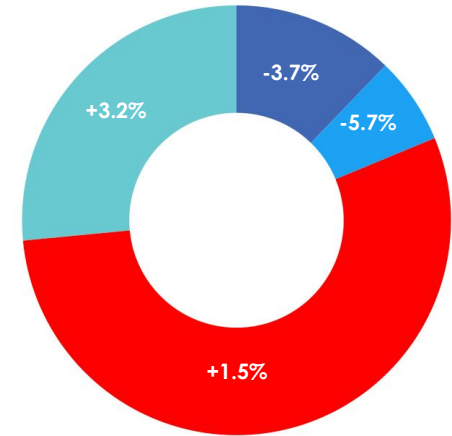
Video Views by Platform (2020)



Video Views by Platform (2021)



Video Views by Platform (Q1 2022)



\*Compared to FY2021

● Facebook ● Twitter ● YouTube ● TikTok

<sup>1</sup>Instagram video views are not publicly available through Instagram's API and are excluded from this analysis

## QSR OVERVIEW

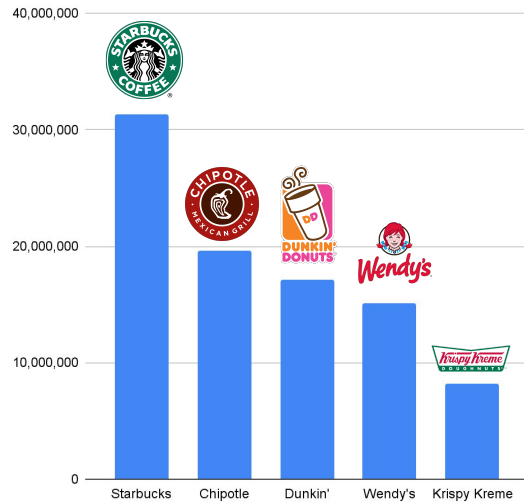


Social media users are engaging with QSR brands that have a distinct, often funny brand voice.

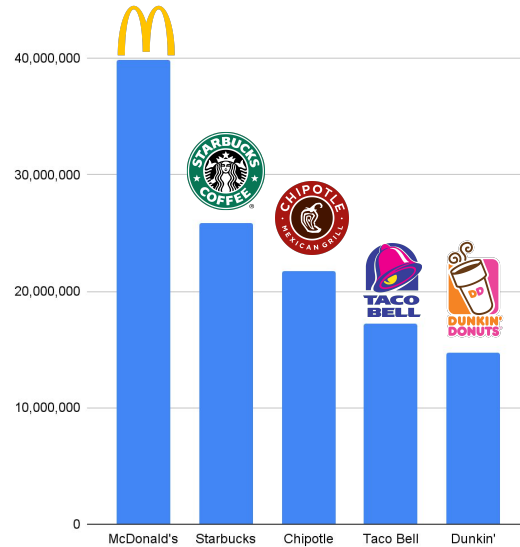
# McDonald's and Taco Bell have unseated Starbucks

Both brands have a irreverent brand voice and were early adopters of TikTok

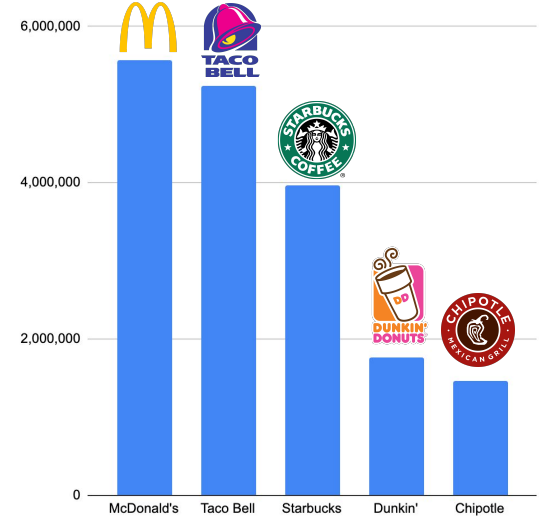
## 2020 Engagements



## 2021 Engagements



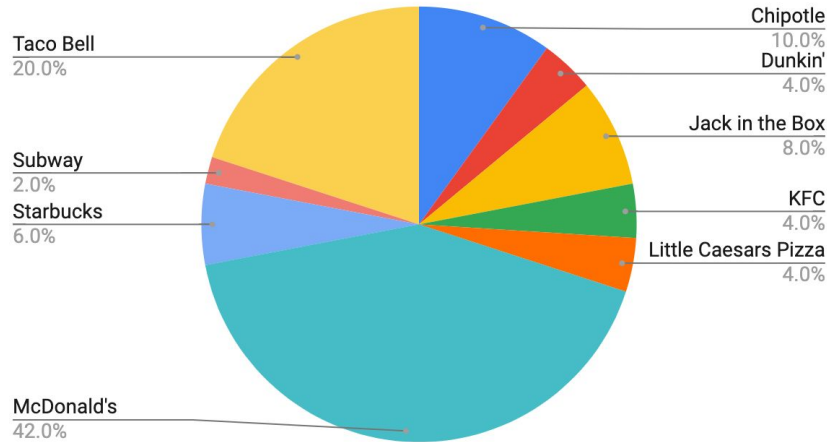
## 2022 Engagements (Q1)



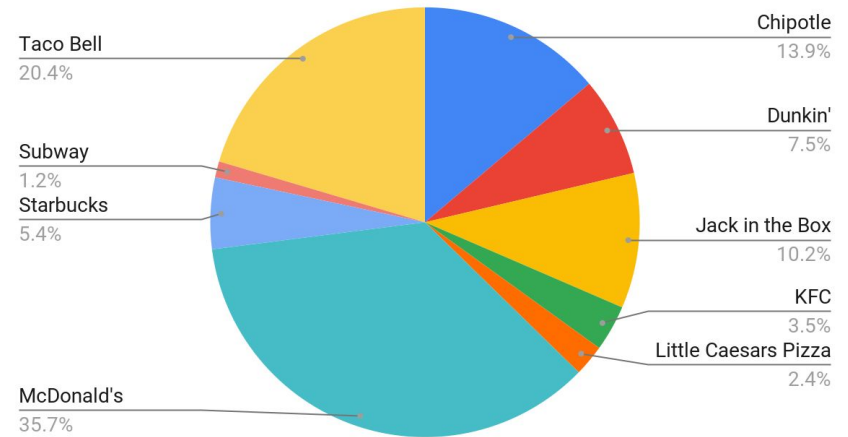
# McDonald's & Taco Bell dominated the top 100 leaderboard

McDonald's dominance was heavily influenced by the brand's partnership with BTS

### Post Volume by Brand (2021)



### Engagement by Brand (2021)



# QSR brands prioritize humor, focus on TikTok and Twitter

68% of the most engaging posts were published to TikTok and the remaining 24% to Twitter

## Humor

At least half of the top QSR posts were humorous, with this type of content appearing most frequently on TikTok and Twitter. Brand managers for major brands like McDonald's and Chipotle speak to consumers like friends, using slang and shorthand in post copy.



**jackinthebox** ✓ Jack in the Box · 2021-7-13

Broken ice cream machine? Never heard of that at Jack in the Box...🤪🍦

Slide thru besties we've gotchu covered with shakes & desserts

#jackinthebox

🔊 original sound - Jack in the Box



760.9K



21.4K



12.1K

<https://www.wsj.com/articles/mcdonalds-mcflurry-mac...>

**McDonald's McFlurry Machine Is Broken (Again). Now the ...**

Sep 1, 2021 — The FTC reached out to McDonald's franchisees this summer seeking information on what, exactly, is going on with the broken ice cream machine ...



<https://www.npr.org/2022/01/11/why-are-mcdonalds-i...>

**Why are McDonald's ice cream machines always broken ...**

Jan 11, 2022 — McDonald's is notorious for frequent malfunctions of its ice cream machine. What's behind those malfunctions and why is the government ...



<https://www.npr.org/2021/11/28/mcdonalds-ice-cream...>

**McDonald's ice cream machines seem to always be broken**

Nov 28, 2021 — And Jeremy explained to me that he was one of the founders of this tiny tech startup called Kytch. And he told me that he had uncovered a ...

# Brand managers are entering the conversation

A shift in brand voice has allowed brand managers to have personalities of their own

**Humor**



Just watched my ex's story from the chipotle account



12:31 PM · Oct 20, 2021 · Twitter Web App

22.3K Retweets 3,610 Quote Tweets 488.1K Likes



**Revlon** @revlon · Oct 21, 2021  
Replying to @ChipotleTweets  
Will definitely have a nightmare about this tonight.

1 1 144



**Chipotle** @ChipotleTweets · Oct 21, 2021  
Thankful for waterproof mascara in times like these

1 1 213



**Revlon** @revlon · Oct 21, 2021  
\*He's the reason for the teardrops on my gu-ac\*

2 39

AE

**American Eagle** @AEO · Oct 21, 2021  
Replying to @ChipotleTweets  
That means you had to search for them though...



1 7 1,049



**Chipotle** @ChipotleTweets · Oct 21, 2021  
reminding myself I don't chase I attract rn

4 105 2,180



**American Eagle** @AEO · Oct 21, 2021  
I affirm that 4u.

3 253



**tesla** @idktesla · Oct 20, 2021  
Replying to @ChipotleTweets  
and how are we feeling about this

1 243



**Chipotle** @ChipotleTweets · Oct 20, 2021  
kind of baller -Soph

3 1,128

This Tweet is unavailable. [Learn more](#)



**Chipotle** @ChipotleTweets · Oct 20, 2021  
she's going through it -Soph

2 547

# “Stan” culture has changed the face of brand ambassadors

An important calculation when it comes to brand ambassadors today is how many followers they have

## Gen Z Brand Ambassadors

Notably within over one-third of top posts by QSR brands were celebrity brand ambassadors, specifically those that appeal to a Gen Z audience, such as boy-band BTS (McDonald's) and TikTok star Charli D'Amelio (Dunkin' Donuts).



Followers of BTS  
Group Pages

# QSR brands are outsmarting consumers and blending in

Consumers are more likely to engage with content that matches their “feeds”

## Custom Video

Unlike some brands that have tried to format existing ads for TikTok, brands like Taco Bell appeared frequently amongst the top QSR posts with custom TikTok content made in the style of a traditional TikTok.



## RETAIL OVERVIEW

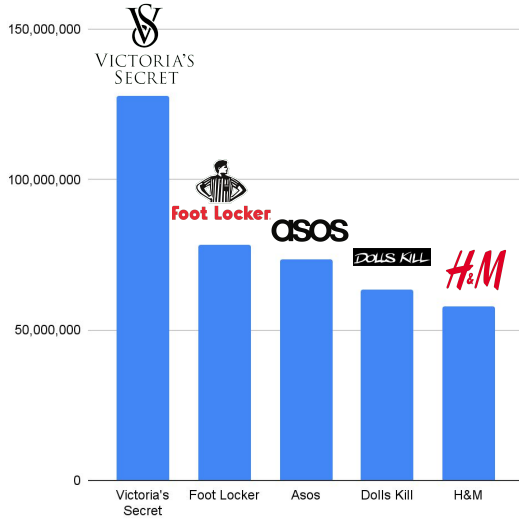


Retail consumers are engaging with creator and influencer content that feels authentic.

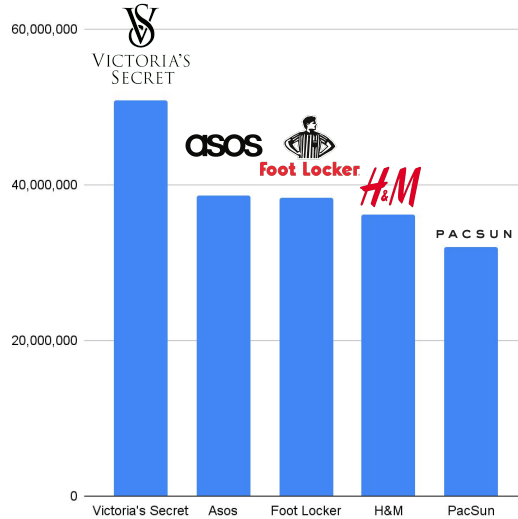
# Fast fashion brands drive the most engagement

Female-oriented fast fashion retailers have grown in popularity YoY on social

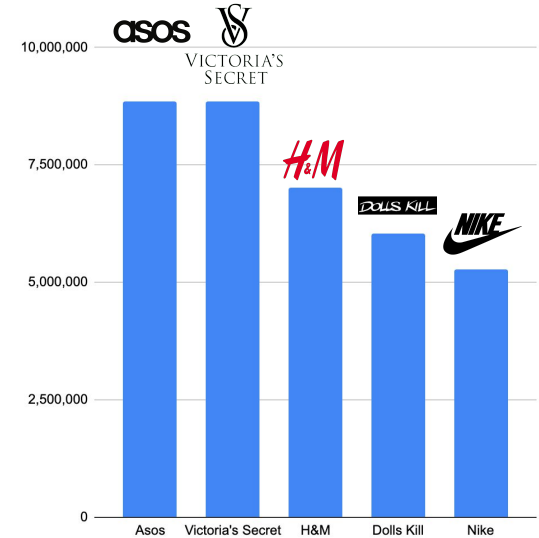
## 2020 Engagements



## 2021 Engagements



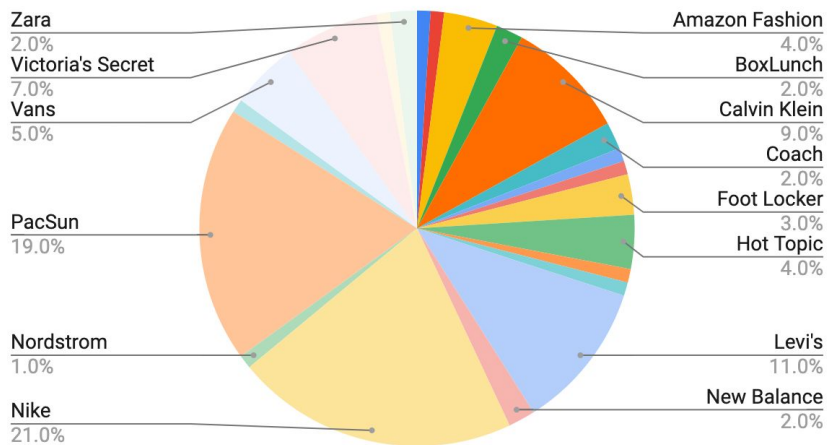
## 2022 Engagements (Q1)



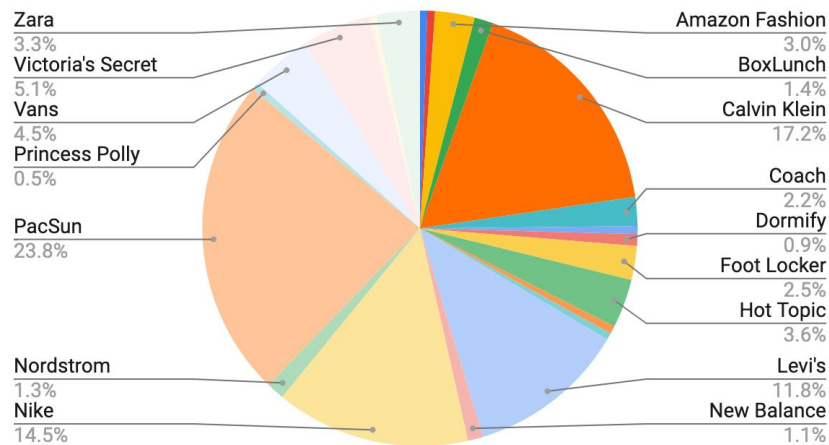
# PacSun, Nike, & Calvin Klein popped on top 100 leaderboard

With solely TikTok content, PacSun drove nearly a quarter of top retail engagement

### Post Volume by Brand



### Engagement by Brand

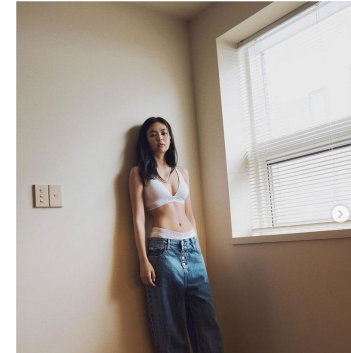


# Top retail merchants are targeting Gen Z on social

60% of the most engaging posts by retailers were published to TikTok

## Influencer Content

Over a quarter of the top retail content featured TikTok creators/fashion influencers creating custom content (typically on TikTok) for a brand or a brand ambassador like a celebrity or an athlete.



calvinklein "Open my eyes to say hello."

@jennierubyjane is a global artist, vocalist of k-pop group BLACKPINK. Based in Seoul. In the Modern Structure Lightly Lined Triangle Bralette, the Micro Logo Ribbed Turtleneck Sweater and the Modern Cotton Bikini Bottom.

Discover the Language of Calvin Klein. Link in bio. Photographed by @hongjanghyun. #mycalvins

# Top retail merchants are targeting Gen Z on social

60% of the most engaging posts by retailers were published to TikTok

## TikTok Trends

Nearly 15% of top retail posts capitalized on existing TikTok trends to captivate consumers. Some examples of this include popular sounds, "POV" videos, and outfit inspiration videos.



♪ THE SOUND WE DONT REALLY NEED - Skeetersbedtimestories



395.9K



689



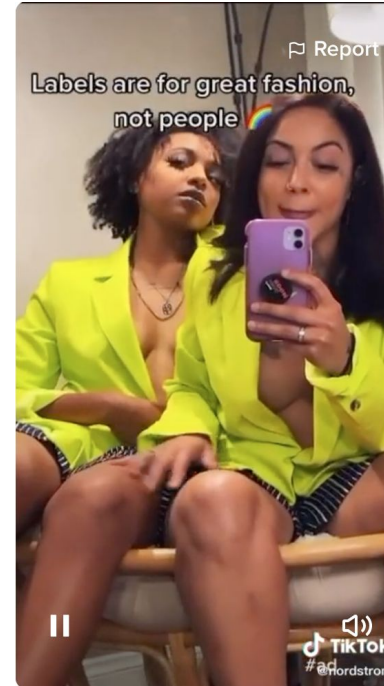
5342

# Top retail merchants are targeting Gen Z on social

60% of the most engaging posts by retailers were published to TikTok

## Diversity & Inclusion

Over 12% of the most engaging retail posts had a DEI focus. These included videos showing consumers how to wear retailers clothes “gender free,” mental health awareness, and a series posted by Nike highlighting global athletes with special skills and experiences.



nike 🌟 Bet you haven't seen flamenco like this before 🌹

¡Viva! is a flamenco troupe founded by @manuellinan that challenges the traditional gender roles of this centuries-old art form: All seven members of the crew perform the dance in full drag. And the people can't get enough... ¡Viva! has sold out shows across Spain and the world, leaving audiences like 🤩

Drop flowers in the comments for the performers 🌹

## AUTOMOTIVE OVERVIEW

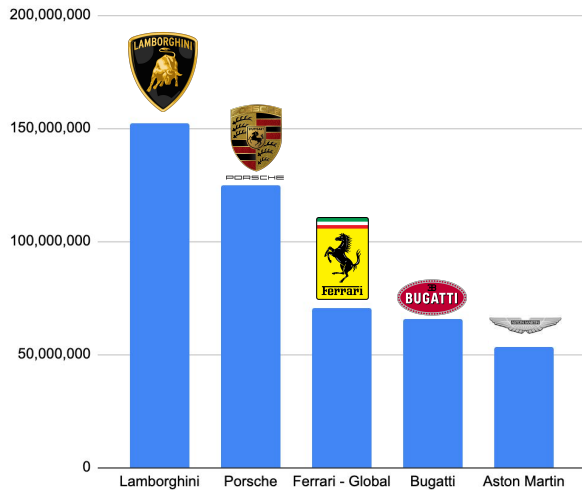


Users have engaged most heavily with ground-breaking and visually-pleasing designs over the last 3 years - but popularity around EVs are growing

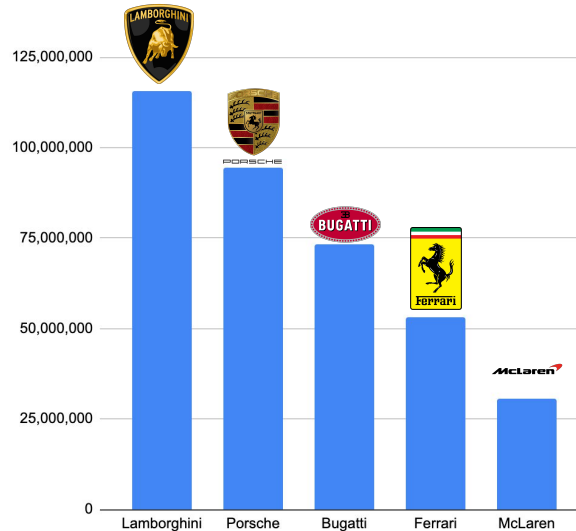
# Aspirational vehicles drive the most engagement

The Top 5 most engaging auto makers have remained the same year-over-year because of the perfect combo of **visually pleasing content** & **ground-breaking features**

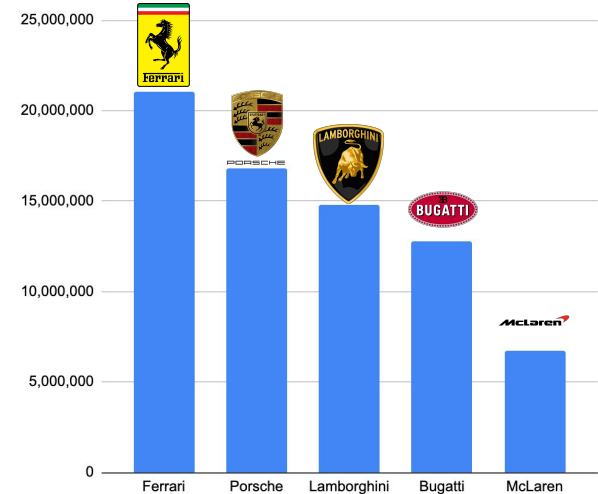
## 2020 Engagements



## 2021 Engagements



## 2022 Engagements (Q1)

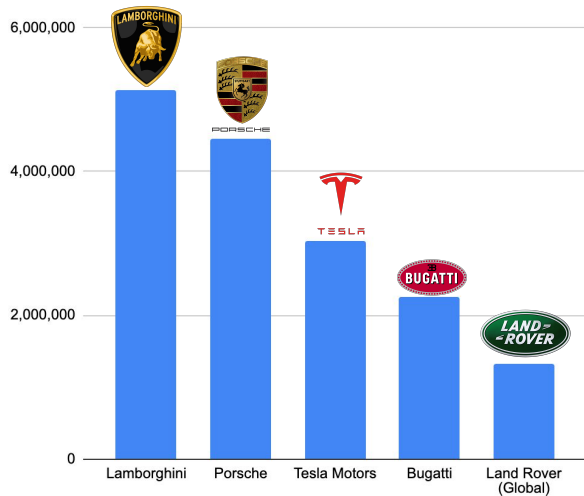




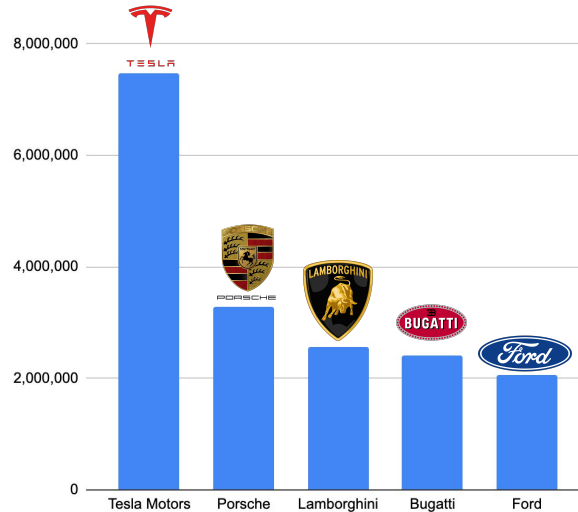
# Popularity around electric vehicles is spiking in 2022

Fisker moved up by 13 spots in the 2022 rankings to date based on new Followers

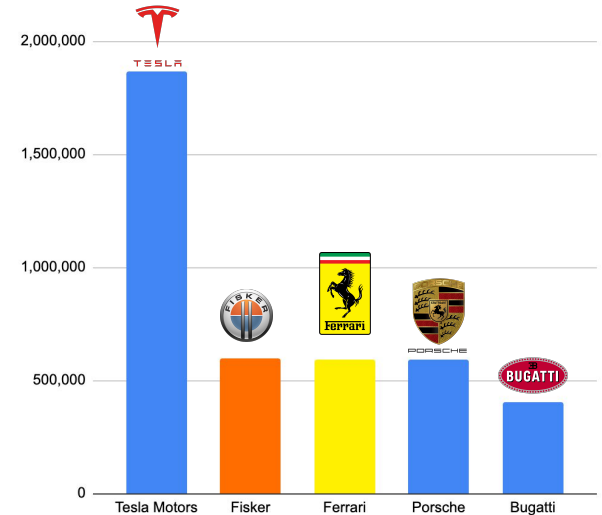
### 2020 New Followers



### 2021 New Followers



### 2022 New Followers (Q1)



# The future is now

Ferrari, Porsche, Lamborghini & Bugatti have delivered the highest Engagement scores of the last 3 years because of their state of the art vehicles



**lamborghini** • Follow

Museum of the Future



**lamborghini** We are always where the future is. And we couldn't miss the opportunity to admire the new Museum of the Future that has just opened in Dubai. We went there with one of our most visionary creations: Sián Roadster.

Captured by @abdullaafari for @lamborghini.uae

#Lamborghini #SiánRoadster

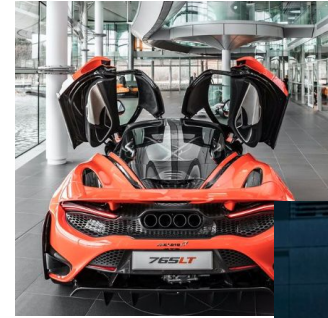
—  
Sián Roadster: fuel consumption combined 18.5 l/100km; CO2-emissions combined 447 g/km (WLTP EU27)

6w



409,024 likes

FEBRUARY 24



# Global impact is top of mind

Phrases like “fuel efficient,” “combined CO2,” “CO2 emission,” and “consumption” have been driving the most engaging Auto posts in the last 3 years



**porsche** Taking an electric-charged trip in order to create an entirely Taycan world. Photographer Tomek Makolski drove 3,000km in the name of electromobility. Link in bio.

[@makolski @weareink](#)

Taycan: Electrical consumption combined in kWh/100 km: 25,4 - 20,4 (WLTP), 28,7 - 28,0 (NEDC); Range combined in km: 354 - 484 (WLTP), Range City in km: 382 - 521 (WLTP); CO2 emissions combined in g/km: 0 (WLTP), 0 (NEDC) | <https://porsche.click/DAT-Leitfaden> | Status: 01/2022



NEDC  
performance  
luxury GT  
Supercar  
power  
Discover  
link in bio  
all new  
g/km Fuel  
Sport  
design  
combined  
emissions Super electric  
emission carbon km l/100km  
CO2-emissions  
mpg Adventure  
drivefirst  
WLTP

# Sports influencers are now being leveraged

This is a brand new move for Automobile brands - and is poised to continue



## RADIO PARTNERS



Radio Branded Content  
secures steady engagement  
for its partners - and is poised  
to continue

# What is branded content?


Platforms defines branded content as a creator or publisher's content that features or is influenced by a business partner for an exchange of value

**Partner**  
(Radio Station)



**Sponsor**  
(Advertiser)

# What does branded content look like?



Harry Styles Says 'Harry's House' Is His Favorite Album He Has Made

z100newyork and inmaxwellhouse  
Paid partnership  
Z100

z100newyork Welcome home, @HarryStyles 🥰👉👈 Who else is nonstop listening to #AsItWas!? 🎵 LINK IN BIO for our full phone call with #HarryStyles 🎵👉👈

#HarryStyles in Z100's Artist Interview Lounge presented by @hmnnewjersey | @inmaxwellhouse @lacrysalrosas

6d

natt\_tris I missed him so badly  
6d 376 likes Reply

— View replies (1)

40,874 views  
6 DAYS AGO

Add a comment... Post



SiriusXM PGA Tour Radio  
@SiriusXMPGATOUR

Looking to set your lineups for this week's Arnold Palmer Invitational Presented By Mastercard? Take a look at the lineup Jason and Michael are locking in this week!

[@JasonSobelTAN](#) | [@ESPNCaddie](#) | [@APinv](#) | [@PGATOUR](#) | [#HittingTheGreen](#)



HITTING THE GREEN'S  
ULTIMATE DFS LINEUP

JASON & MICHAEL'S LINEUP FOR  
THE ARNOLD PALMER INVITATIONAL

R. McILROY - \$11,100

M. FITZPATRICK - \$9,200

# What does branded content look like?



ENTER TO WIN WHEN WE WERE YOUNG FLYAWAY

- 1) Follow ALL 3 of our socials
- 2) Like the posts
- 3) Tag your BFFs
- 4) Hashtag it #star1019
- 5) Account must be public

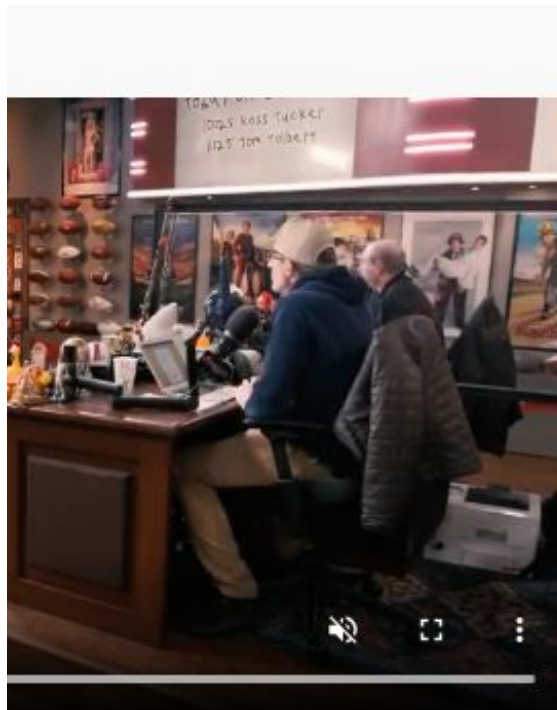
BONUS:

Repost, RT, share our posts

Winners + 1 must be 21+ & Oahu Resident

Mahalo @alaskaair

#sponsored



danpatrickshow • Follow



danpatrickshow #AD Don't let age beat you. Refind your prime with @mdrive

14w



maxshade7 It's also a great chocolate shake!

12w Reply



9,750 views

JANUARY 2



# The volume of radio branded content is very high

**In Q1 2022 alone, LF identified:**

Average ad spend a sponsor would have to commit in a typical campaign, to earn the same number of estimated impressions that the sponsored post received



**4,333**  
Posts



**510**  
Sponsors



**102K**  
Engagements



**\$63K**  
Estimated  
Media Value

# Radio branded content is still very effective for both parties

Compared to Q1 2021, both Engagements and EMV have grown significantly



**+51%**

**More  
Engagements**



**+1%**

**Higher EMV**

# Who is partnering with radio stations on social?

By volume, local businesses are driving the highest volume of social partnerships

#1



Financial Services



#2



Local Car Dealers



#3



Hospitals & Healthcare



#4



Home Services



#5



Government Agencies



# Users engage the most with nationally-recognized brands

The most **engaging** partner posts featured big-name brands, like Pepsi, that promoted local concerts, giveaways & discounts on new products

#1



CPG  
Beverage

#2



Food  
Delivery

#3



Local Retail

#4



National  
Restaurant

#5



Community  
Centers



GRUBHUB



BOOTS 'N JEANS  
WESTERN WEAR

WYNEWOOD  
VILLAGE  
SHOPPING CENTER

PIEOLGY  
PIZZERIA



KA MAKANA ALI'I  
The Center for West O'ahu

HEART OF TEXAS  
Shooting Center  
& INDOOR FIRING RANGE

# The Power of Partnerships

Hackensack Meridian Health benefited greatly from Radio Partnerships



Z100 published **16 Instagram posts** “sponsored” by Hackensack Meridian Health in Q1 2022, averaging

**6X** More Engagements/Post



Than by Hackensack themselves on Instagram based on activity across their Instagram posts in Q1 2022

# Key Learnings

## **TikTok is here to stay.**

Total engagements across Top Advertiser brands jumped by 132% between 2021 and 2020 as TikTok grew. In 2021, TikTok drove a fourth of cross-channel engagement across this cohort - marking a 17pt increase YoY. This dominance has remained the same in Q1 2022.

→ *It's not too late to begin engaging consumers on TikTok.*

## **Consumers are now connecting with brands as they would with individuals on social.**

Across verticals, influencer and creator partnerships are critical for brands' continued growth, allowing consumers to put a face to the brand. However, consumers are now savvier than ever before so authenticity must be at the forefront of these partnerships.

→ *Leverage micro influencers and creators in partnership content.*

## **Radio branded content secures steady engagement for themselves and their advertisers - and is poised to continue.**

These posts drove over 100,000 Likes, Reactions, Comments and Shares across Facebook, Twitter, Instagram, YouTube and TikTok in Q1 2022 - which was +51% more than in Q1 of 2021.

→ *Discounts, giveaways, and local events and businesses drive the most engagement.*



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