THE YEAR AHEAD IN SOCIAL BY BATTENHALL

Battenhall's 12th annual social media report

Published 28 November 2024

CONTENTS

EXECUTIVE SUMMARY 3

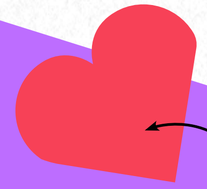
SOCIAL-FIRST EVERYTHING 4

SOCIAL INTELLIGENCE 10

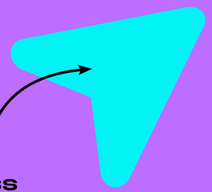
COMMUNITY AND CULTURE 13

DARK SOCIAL 17

SOCIAL SORTING 22

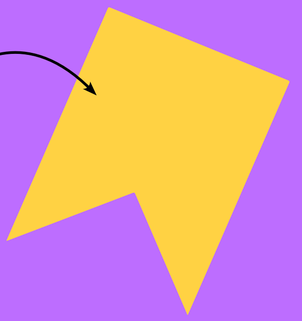


Things we LOVE



Don't miss these bits!

Lookout for the save icon throughout the report to save important information



BATTENHALL

EXECUTIVE SUMMARY

Looking ahead has never been more important

It's been another exciting but tumultuous year in social media – with more big changes to come. In this report the Battenhall team has gathered a wealth of data, analysis and predictions to help you plan for 2025 and beyond...

Welcome to The Year Ahead in Social – Battenhall's 12th annual report – which looks at current trends, and forecasts the major forces shaping the future of social media over the next year.

This publication has been put together by a team of 19 international contributing authors and researchers, and a production team of over 120 at Battenhall. They include analysts, community managers and designers, who are all helping to shape the outlook for the year ahead with their insights and data.

Looking back at our last 11 forecasts, and it is clear that the inexorable rise of social media shows no signs of abating. Our analysis covers a set of converging trends that are creating an environment as vibrant as it is turbulent. We are seeing surging user numbers, increased time online, and attitudes becoming increasingly social-first. These are being balanced by shifting habits and, in some cases, steep drop-offs. Where one network flourishes, another flounders, so looking ahead has never been more important.

OUR FIVE BIG PREDICTIONS

The five topics in this year's forecast build on our predictions from last year, and provide clear opportunities for brands to stand out in 2025.

1. **Social-first everything.** How can brands lean into social media as the first part of a user journey when planning campaigns, rather than a bolt-on at the end? Over the past year, we've seen social media user data outpace many other media segments, and we predict this will increase in 2025.

2. **Social intelligence.** Building on last year's prediction of a rise in gen AI for social media content, as well as growth in AI-powered social media users and influencers, we explore how the tech can be used to protect communities, turbo-charge audience insights, and deliver predictive analytics.

3. **Community and culture.** How can brands drive value from moving beyond basic customer care and push marketing on social media? We draw links to social-first audience behaviours, and look at how consumer and corporate social media operations are building brand love through culture.

4. **Dark social.** The greatest volume of social media doesn't take place in public. Think private social on Snapchat and Instagram, messaging apps like Telegram and WhatsApp, and communities such as Discord and Roblox. We explore the opportunities for brands to tap into these spaces.

5. **Social sorting.** A year ago we predicted the rise of Bluesky and Threads, and an 'X-odus' from Twitter. That's playing out in real time with Bluesky and Threads growing by one million users a day right now. Find out the state of play and how you can capitalise on the growth of these platforms.

I hope you enjoy reading the report – and you put our research to good use in the year ahead!

Drew Benvie
CEO and founder



SOCIAL-FIRST EVERYTHING







Social media's growing impact is reshaping culture and commerce, reaching unprecedented levels of influence. **Issie Burton**, **Emillie Hawes** and **George Brett** explore how brands must adopt a social-first approach to succeed.

Social media has reached new levels of influence in society and culture this year. It has surpassed television as the most popular source of news in the UK and US for the first time[1], and overtaken search[2] for ad spend globally.

These major global changes have intensified scrutiny of social media's impact. Nervous governments – particularly in the case of Australia[3] – are introducing laws to curtail younger teens' use of social media as a way to limit exposure to vulnerable audiences.

On the flip side, social media has become intrinsic to the human experience in weird and wonderful ways. It guided the year's key pop culture moments. Charli XCX's Brat album launch campaign defined the summer, while a TikTok post by creator Jools Lebron established a new lifestyle slogan: 'Very demure, very mindful.'

In 2024, social media became a foundation for global togetherness. In 2025, it will evolve into the host of everyday life, solidifying its role as an easily accessible one-stop shop for discovery. Brands keen to harness this hype of 'social-first everything' must do so strategically, putting social at the heart of their user journey. To stay relevant, content must evolve beyond advertising and focus on building truly engaged audiences.

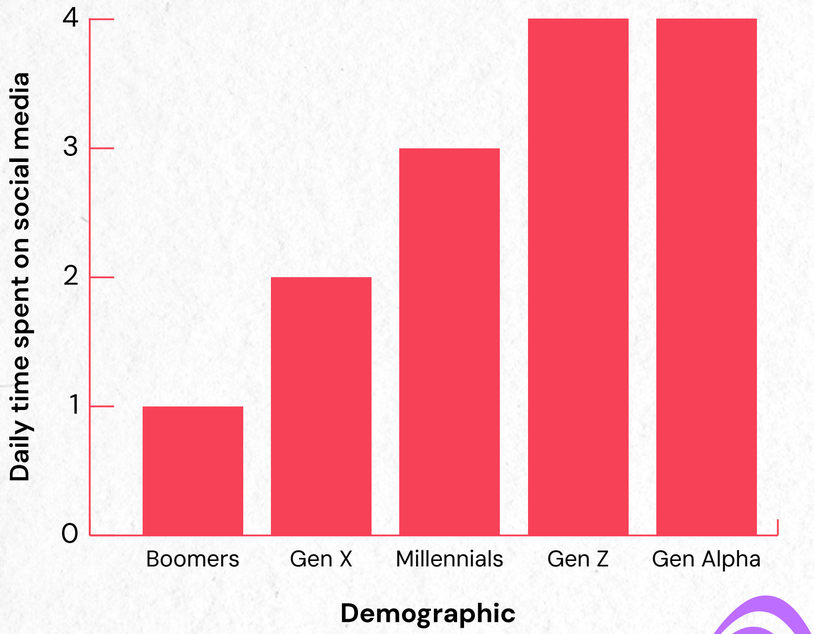
> "Very demure, very mindful"

Social media has become intrinsic to the human experience in weird and wonderful ways



Growing user base
Social media usage continues to grow across all categories. User numbers are up by 4.4% in 2024 to a global total of 5.17 billion[4]. The average person now spends 2hr 20min on social media every day. It's far greater for younger users though, with 35% of Gen Z scrolling for more than four hours a day[5].

DAILY TIME SPENT ON SOCIAL MEDIA BY GENERATION



Source: *Statista*

THE MONOPOLY ON ATTENTION

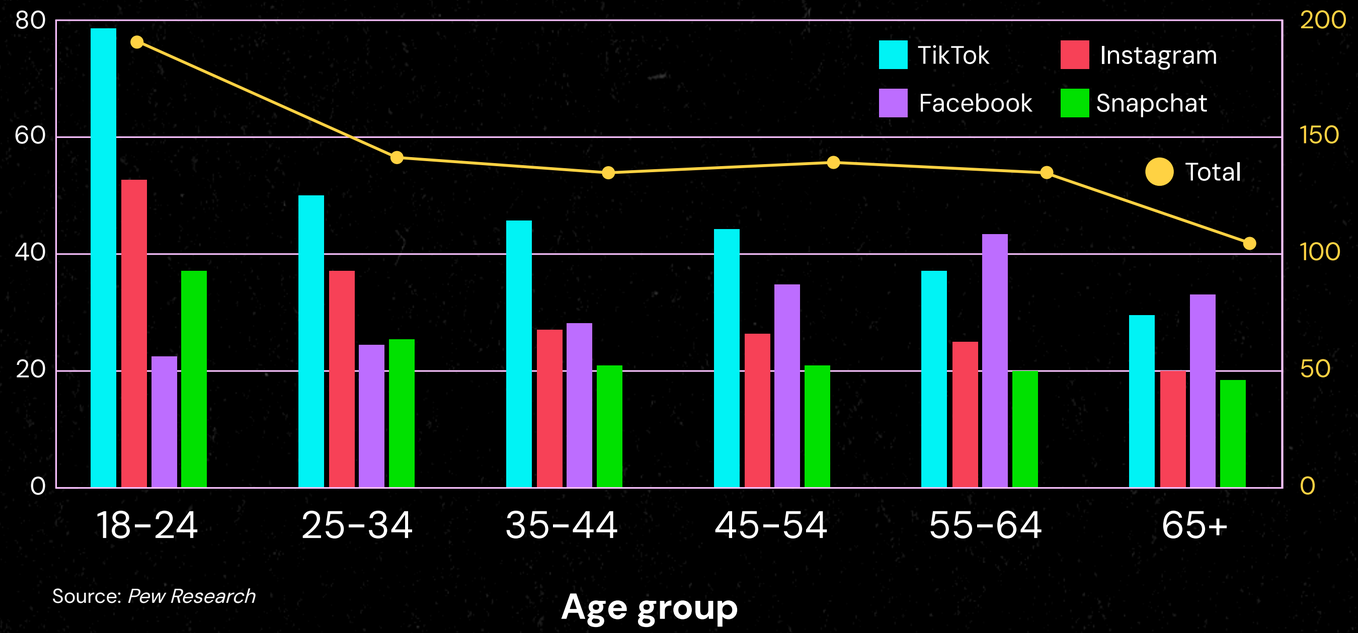
Social media has gained a monopoly on attention. People are building lives based on the content they consume. With such a stronghold on decision-making, social networks influence real social interactions, political leanings, financial behaviours, hobbies, career development, and much more. Social media now operates like a 'curator of the self' – and it's a movement that brands should pay close attention to.

Living in a social-first era is complex and 'social-first everything' branches deep into various elements of life online. On the next page, we'll explore them under three strands...

1. Social-first information
2. Social-first language
3. Social-first experience

35%
of Gen Z are scrolling for more than four hours a day

TIME SPENT ON SOCIAL PLATFORMS BY AGE



Source: *Pew Research*

SOCIAL-FIRST INFORMATION

Social media is increasingly owning the spread of information. Now a popularised free search engine, social media has democratised access to knowledge in a way that no other digital platform has been able to do before. The visual nature of this new search gives anyone the ability to share information widely and live-stream news as it unfolds in real-time. Network algorithms[6] – particularly TikTok – have leaned into this new reality by engineering AI-trained features to boost content searchability in line with user preferences. This creates a bespoke experience that encourages users to stay on the app.

SOCIAL-FIRST LANGUAGE

Eras can be defined by evolutions in language. In the era of 'social-first everything', language reflects the digital cultural zeitgeist and helps identify and relate to different demographics, notably age. Millennials love a 'glow-up', Gen Z are obsessed with a 'slay' moment, and Gen Alpha might describe a popular friend as a 'sigma'.

The constant flow of content forces users to adapt their language in real-time alongside the next viral meme or trend, making it a challenge to keep up for anyone not immersed in this digital world. Social media curated the dictionary of 2024 and will no doubt do the same next year.

Brands should be mindful of this fast-paced evolution. Understanding how quickly language changes is crucial for effective communication. Know your demographic: will this trend resonate? Have people moved on? Scrutinise whether something will authentically resonate with your audience.

SOCIAL-FIRST EXPERIENCE

Social media is not only a means for discovery – it's the only digital environment where users can be fully immersed in an experiential journey. A truly unique experience that can't be replicated elsewhere.

Take the influence of Charli XCX's Brat album promotion - one that echoes the success of last year's Barbie movie campaign. Social media supercharges cult-like movements and has enabled savvy brand campaigns to claim ownership of the pop culture during the moment.

Charli XCX's Brat campaign contrasted with the polished "clean girl" aesthetic, championing a chaotic and relatable energy that resonated with Charli's fans. Charli encouraged everyone to be more raw. The movement reflected a cultural shift towards authenticity instead of a curated image of the self. Charli's impact even reached the political world when Kamala Harris adopted the bold green branding after being labelled 'Brat', highlighting the power of social media in engaging with Gen Z.

The Brat campaign claimed the summer of 2024, in a similar way to how Barbie campaign dominated last year. They did so with a campaign approach that was able to pass ownership of the campaign onto the audience entirely. For Brat, this meant that user-generated campaign content, such as the 'Apple Dance' created by TikTok star and actor Kelley Heyer, was able to snowball the impact of the campaign due to its replicability and the shareability of visual storytelling. Through user-generated campaign content, pink became the colour of summer 2023, while green was everywhere this summer. What will become the big thing in 2025? Only brands that relinquish control of a tightly bound marketing plan and allow users to steer the course will be in the running.







Brat reflected a cultural shift towards authenticity instead of a curated image of the self

I'm not directly influenced by social, but maybe influenced as a by-product of social... I basically listen to those around me, probably making me the cringe millennial who tries to say the right things but gets it horribly wrong.

- Millennial

I don't personally think social media has influenced my vocabulary too much. I do believe it can have a negative impact. For example, words like 'cuck', 'beta', etc have become a lot more prevalent in everyday usage - and even in the media - because of social.

- Gen X

The way social media shapes vocabulary is not all useful, but you definitely learn new vocabulary and it can be funny as it quickly inspires memes among friends, which is a good thing. But it's important to stay relevant. One thing that is already quite passé, is that social media abbreviations are quite childish so we don't use them any more. We prefer full words. Abbreviations like "RQ" for "real quick" are for younger children now.

- Gen Alpha

I say 'slay' in every situation. I think my vocabulary is a victim of being chronically online.

- Gen Z



Why does social-first matter?
For many, social media is the first and last destination in the user journey – there's no Plan B. Marketers are realising that: global ad spend is poised to reach $1 trillion[7] by the end of 2024, with social ad spend increasing to make up nearly a quarter of that total. Traditional media ad spend, meanwhile, is on the decline.

This indicates that new generations are social-first consumers, although behaviours across all ages are emphasising the importance of social media.



How can brands be social-first in 2025?
For brands, social media can build identity and forge connections with audiences on a much deeper level. Superficial brand stories no longer reach consumers in the same way. Brands are dealing with a generation driven by genuine emotion[8], who consider brand connection as an extension of their self.

As social media is such an easily accessible tool, it has united the divide between business and consumer. Brands can listen in on audience conversations and choose whether to engage or not. As primary search engine and shopping destinations[9], social networks are the best places to connect businesses with consumers.

This shift should reshape brand planning, campaign ideation, celebrity endorsement, and even product development. We're now in an era where an algorithm can propel any idea - for free - to a larger and more receptive audience than any media channel or advert could reach. This is a social-first world and you have to be in it to win it.

Global ad spend is poised to reach $1 trillion by the end of 2024

STEPS FOR SUCCESS

In 2025 consider following these three points below to become the social-first brand that 'gets it'.

1. CREATE A SOCIAL-FIRST APPROACH THAT CATERS TO YOUR AUDIENCES' NEEDS

Audiences rarely click away from social media unless you give them a reason to. Focus on a strategy that harnesses the power of in-app information and enjoyment, to build a cult following that brings users further down the funnel to consideration and purchase (where relevant). Additionally, to truly encompass social-first, think about how content can be shareable, so connections can be built upon through your posts as a brand.

2. GET GRANULAR WITH YOUR AUDIENCE UNDERSTANDING

Knowing your audience, how they speak, what they do and don't care about, and what they'll respond to best, is the sweet spot on social media. To do this, deep analysis is required. Effectively aligning with the audience in a variety of ways is proven to deepen the connection. Leading with analysis helps to ensure you're on the right track.

3. FIND A MOMENT, JOIN A MOVEMENT

Huge cultural trends are born on social media, and some of the biggest this year blur the line between virtual and real life. Don't underestimate the power these moments have across the internet and other marketing touchpoints too. Finding opportunities to join the dots through a multi-channel approach can level-up your brand's reach, while putting your name on the social media map.

> "Knowing your audience, how they speak, and what they'll respond to best, is the sweet spot on social media."

SOCIAL INTELLIGENCE

The rise of generative AI in 2024 has had a profound effect on creative industries. Ciara Beaumont-Wood, Keri Hudson and Nicole Mezzasalma analyse the policies, playbooks, and best practices for its use in 2025.

Generative AI is a game-changer when it comes to content, creative and community, and you'll be hard-pressed to find a marketer who hasn't tried asking ChatGPT to do their job for them. According to recent data[10], gen AI has led the charge with experimental marketing teams this year: 73% of UK CMOs have adopted the technology, with many using it to help generate written (73%) and image-based content (67%). AI is delivering significant value, with recent research highlighting two key outcomes: increased efficiency in content production (48%) and improved quality of content (52%).

There has been an acceleration of AI's integration into social platforms, which is driven by innovation, user demand and regulatory oversight. From AI chatbots to improvements in content moderation and safety, the scale of the technology's impact is already considerable.

But more sophisticated applications of AI are already starting to make waves, as improved analysis capabilities are becoming a widely reported business benefit from the application of AI (53%). Applied to social intelligence, the implications could be transformative in 2025.







BATTENHALL

EXPANDING ON AI'S PRACTICAL APPLICATIONS IN SOCIAL MEDIA MARKETING

To better understand the emerging uses of AI in social media, we conducted a year-long analysis of our own data. Every weekday, we publish a WhatsApp news broadcast that covers the top industry developments. We analysed the stories to uncover the top themes where AI advancements are shaping new developments for social media marketers. Here are our findings...

1. AI FOR ENHANCED UX AND PERSONALISATION

Algorithms are AI in action, learning from consumer habits to reshape social content at scale. Advancements in this space include TikTok's new slider tool, which enables users to control the topics that are seen on the For You page. This represents a move towards AI-driven customisation that gives users more agency and choice in what they consume.

2. AI IN CONTENT MODERATION AND USER PROTECTION

Platforms like Meta, TikTok and Snap have collaborated on 'Thrive,' an AI-powered initiative that flags and removes harmful content. By sharing digital 'fingerprints' of dangerous content, such as self-harm material or hate speech, the platforms aim to create safer online experiences.

3. AI-POWERED TOOLS FOR CREATORS AND ADVERTISERS

YouTube and Meta have unveiled AI-driven tools for video creation. YouTube offers background generation and video segmentation for creators on YouTube Shorts, and Meta provides tools like Movie Gen for video creation.

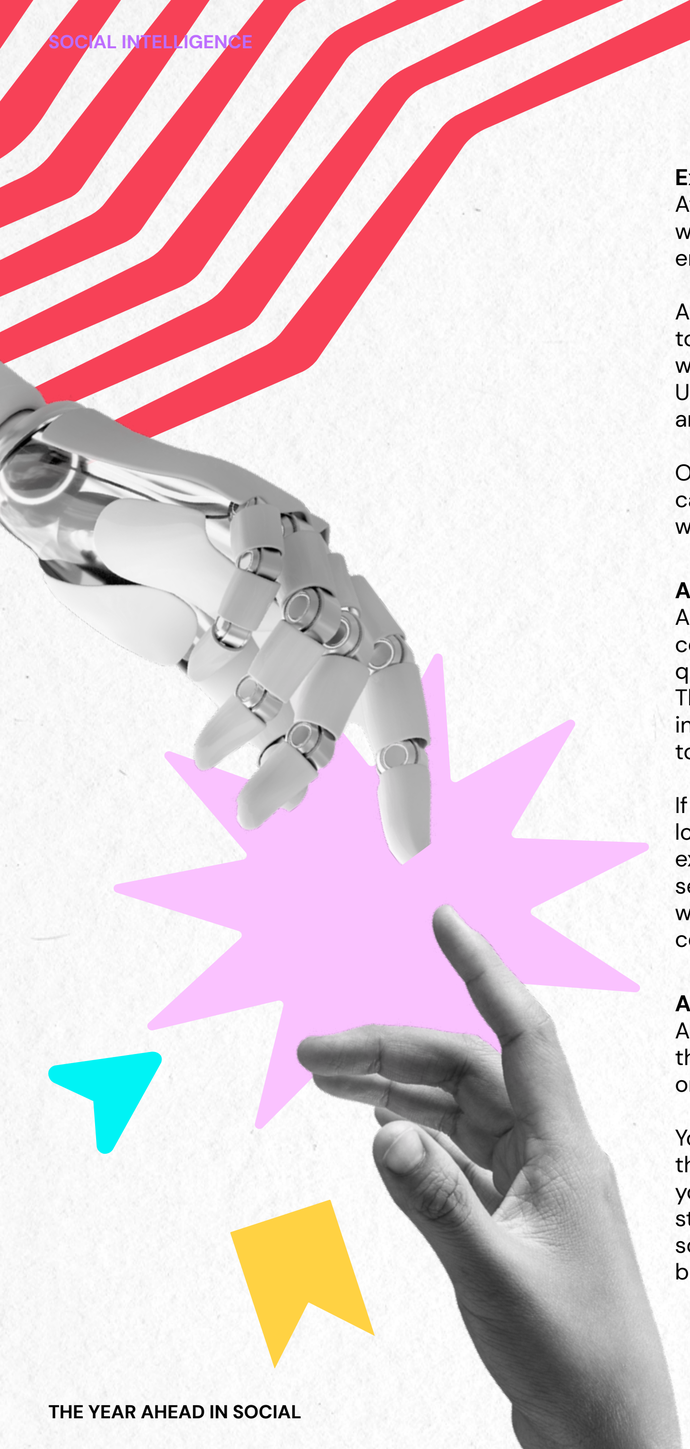
4. AI RESHAPING RESEARCH AND ANALYSIS

OpenAI's new reasoning model can answer complex queries faster than humans, indicating AI's expanding role in content production and research. Google has also expanded its search functions, with AI-organised results making search and content discovery more efficient.

Algorithms are AI in action, learning from consumer habits to reshape social media content at scale



BATTENHALL



Experimentation to exploration
At Battenhall, we foster a culture of innovation through our 20% time initiative, where one in five hours is dedicated to non-client work. This approach has enabled us to fully explore AI's potential and benefits for the year ahead.

AI's business benefits in creative ideation and driving efficiencies are simple to comprehend and even simpler to apply. Of course, the devil is in the detail, which is why most organisations will by now have AI guidelines in place. Used well, AI can improve productivity, help teams think differently, and even stretch a team's creative thinking.

One of the most exciting applications of AI is data analysis. While this use case is common in data analytics, its benefits to social intelligence across wider teams could revolutionise strategy and planning in 2025.

AI and the social intelligence analyst
AI advancements have enabled social media analysts to automate time-consuming and costly tasks, such as thematic coding of social content, quote-finding from survey data, and identifying patterns in copy and visuals. This gives analysts far more time and space to conduct even deeper dives into social performance and market research data, which can then be used to inform strategies.

If you want to know what works in your social content, ask AI. Your AI tool can look more deeply into data than manual methods allow. It can be used to extract performance metrics, timings, and platform usage, as well as feed data sets into an AI engine to accelerate insights, process data faster, and work with larger datasets than ever before. Intelligence and analysis will be more comprehensive as a result.

AI and the social strategist
AI can also turbo-charge social media strategy development. One way to do this is to share an audience persona with your AI of choice, such as ChatGPT or Gemini, and ask it to role-play as that character.

You can then engage in a conversation to discuss your ideas, test your theories, and explore the possibilities of a tailored focus group – based on your dataset – being brought to life. The conversation allows you to explore strategic and content opportunities – for example, asking it to suggest scenarios for videos that it would find engaging or funny. Responses can be used as a springboard for further brainstorming and development.

HOW TO LEAN INTO GENERATIVE AI IN 2025

With the current enhancements in AI's out-of-the-box capabilities, how can the technology be harnessed for social media intelligence in 2025? Here are some practical tips.

1. REDEFINE METRICS TO REFLECT AUDIENCE BEHAVIOUR

For years, social teams have relied on reporting metrics supplied by the platforms, with 'engagement rate' often used as a barometer of content performance. This is useful for consistency but ignores the various behaviours associated with different post formats, creatives, and messaging.

In 2025, try exploring how to develop more meaningful metrics rather than a universal set of criteria. AI will play a central role in this, from automating the tagging of posts with behaviours and objectives to developing strategic insights to inform next steps.

2. UNDERSTAND TRUE CONVERSATION SENTIMENT FOR COMMUNITY MANAGEMENT

Community management is crucial, but why not go deeper in 2025? AI can assess sentiment in user interactions and understand emotional responses. This can reshape community management strategies, focusing on more valuable conversations, not just increased interactions.

3. PRIORITISING TOOLS WITH GENERATIVE AI CAPABILITIES

Work with your tool providers to maximise the use of gen AI tools. In the short-term, this will likely focus on improving efficiencies. Intelligent search, which replaces the need for complex queries and boolean terms to interrogate large listening and market research datasets, is the most common example of this evolution as an emerging AI feature. However, look at ways to track developments in predictive TikTok trend analytics, video visual recognition, creative asset scoring, and competitor data review – all of which will bring significant value to your reporting and planning.

COMMUNITY AND CULTURE







Social media is more than just fan clubs. Consumers now expect brands to engage in cultural conversations and align with their values. **Luke Bellos**, **Bethany Gough** and **Akilah Harper** explore the growth and importance of community.

Social media community management has evolved beyond responding to customers or promoting campaigns. Today, the most successful brands are looking to harness social to drive cultural relevance and online virality with playful interactions and real-time responses to trends. It's now seen as essential for building strong, relatable brand identities.

Build for social
To cut through, switched-on brands are beginning to recognise that building cultural relevance is paramount. Younger generations expect brands to align with their values, not just their wishlists. They want brands to engage in current conversations and reflect their interests. Social media is where people go to understand what makes the world tick. This is where the battle for community can be won or lost.

Social platforms enable brands to reinforce their communities by engaging authentically, capitalising on cultural moments, and partnering with creators. But all too often, culture scares brands away, and they stick to their knitting of customer care and campaign activation. Going beyond this, through targeted content and real-time interactions, brands can become a meaningful part of consumers' everyday lives, which fosters loyalty and trust. The immediacy and reach of social media amplifies these efforts, deepening personal connections with audiences.

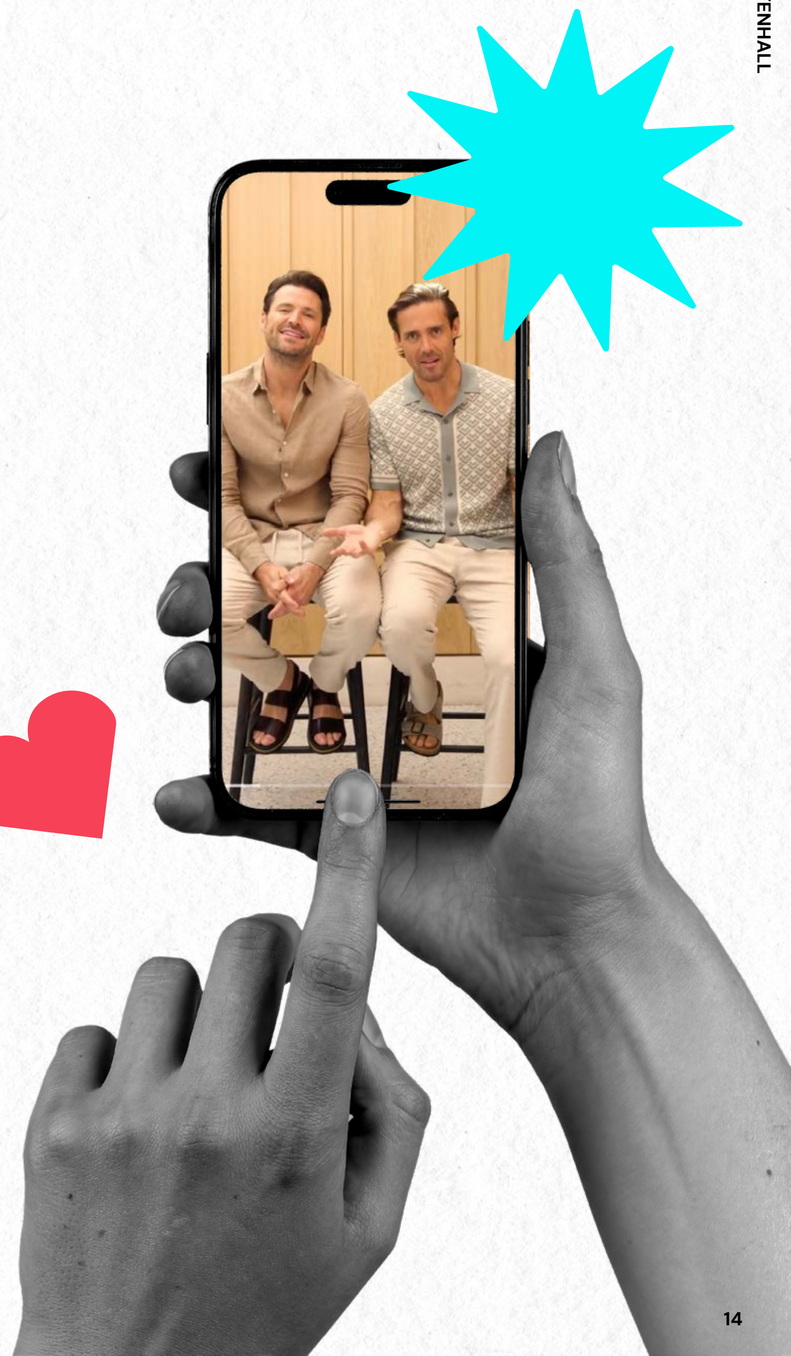
This movement is gathering momentum and will be a key part of customer journeys in the year ahead. Let's look at examples of how you can take advantage of the opportunities to build community through culture.

Campaign to trend
To enhance authenticity and reach, brands are increasingly partnering with well-known personalities on social media to engage their communities in a relatable way.

A great example is a recent TikTok and Instagram campaign by Marks & Spencer featuring celebrities Mark Wright and Spencer Matthews. This clever nod to the brand's name was playful and lighthearted and it resonated with TikTok's younger audiences who typically might not shop at M&S. By tapping into these celebrities' fan bases, the campaign capitalised on social media's interactive nature to expand its reach.

Marks & Spencer inspired other brands, including Matalan (Matt and Alan) and Argos (TOWIE's Arg), to share similar videos introducing new name-based brand ambassadors. These videos all blew up on social media and received high engagement, including comments from other brands, such as Shark, Screwfix, and Cineworld, that wanted to get in on the trend but couldn't.

> Switched-on brands are realising that cultural relevance is paramount.

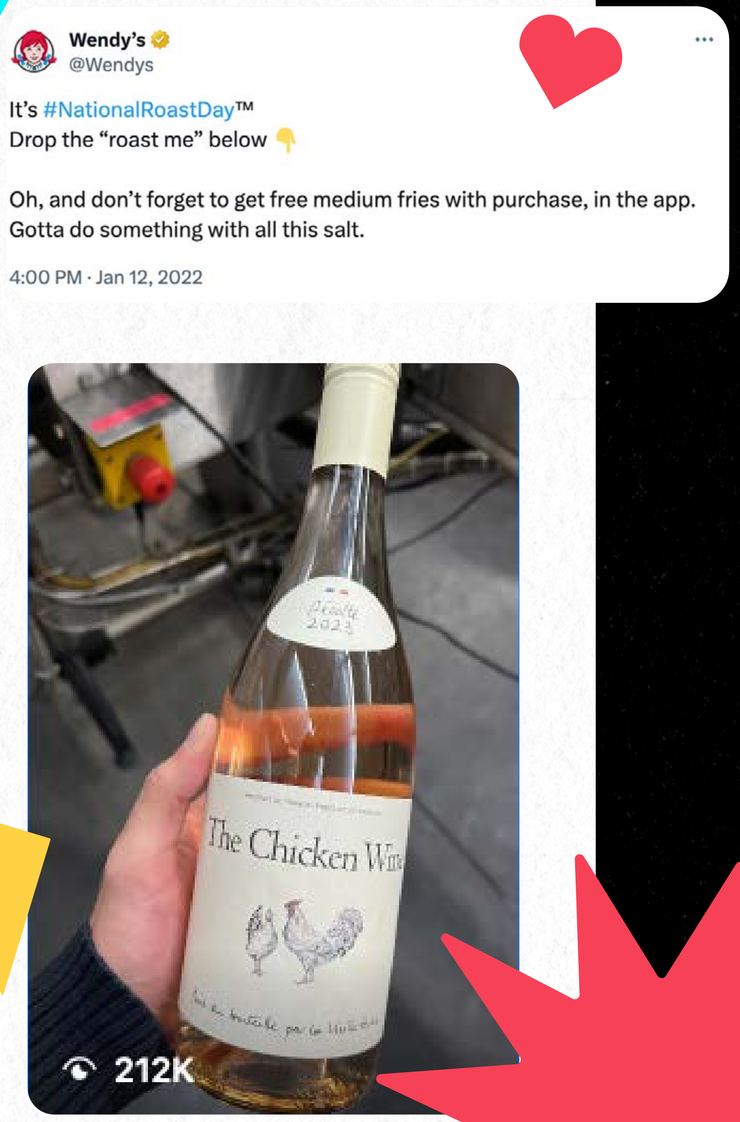


Getting the right tone
Humour and genuine interactions can make brands culturally relevant, as seen with Wendy's 'National Roast Day'. By devoting a day to roasting its social media followers, Wendy's demonstrated the brand's deep understanding of the online cultural landscape. This approach highlights how active participation can position brands as key players in community conversation, moving beyond traditional customer-business relationships.

The power of direct fan engagement was on full display after drinks container company, Stanley, responded to a viral TikTok of a Stanley tumbler surviving a car fire – with the ice still intact! The company's CEO reached out to the fan, gifting her new tumblers and a car for the unexpected endorsement. The positive response initiated a wave of user-generated content. Stanley's swift action demonstrates that prompt responses to viral moments can strengthen brand identity and fuel organic community-building.

La Vieille Ferme's launch of limited edition 'The Chicken Wine' bottles in the UK is an excellent example of how a brand can effectively listen to and engage with its customers. By playfully leaning into people calling it 'Chicken Wine,' they were able to strengthen the connection with its audience – and boost mentions on social media by capitalising on its popularity.

Humour and genuine interactions can make brands culturally relevant



Charity appeal
Charities are also using TikTok to connect with younger audiences. The Royal Society for the Protection of Birds (RSPB) found success on the channel by adopting a Gen Z tone of voice, blending humour, trending audio, and bite-sized educational content, to make conservation relevant and entertaining. This approach has allowed the charity to tap into TikTok's viral nature, boosting engagement, raising awareness, and inspiring a new generation to care about nature conservation. The RSPB's success highlights how a strategic shift in communication style can effectively connect with different demographics and build stronger, more engaged online communities.

In addition to content, charities are also using social media to communicate directly with followers. Community management is an essential part of the always-on social media strategy, and it is becoming increasingly prevalent as brands become more present on social media. RSPB, for example, answers questions and aims to educate audiences through community management activity.

Mental health charity Mind highlights another effective use of community management. It extends its caring and considerate TOV into the way it engages its audience, offering support or advice to users who reach out via commenting on a post.

Brands that connect with their audience show that they feel valued. For charities looking for ways to support the fundraising funnel, social media offers an opportunity to significantly broaden their demographic, reiterate the charity's mission, and solidify digital brand identity.

Community management can be effective for all kinds of organisations: 79% of marketers[11] say that building active social media communities and fostering communication is crucial to their overall marketing strategies, highlighting its relevance and importance in future marketing activity.

Creator-led brands
As the role of the influencer becomes more central to online activity, more creator-led brands are emerging. Over the past year, lifestyle brands Refy, Tala, and Maebe have built sizable communities by fostering personal connections between the influencers and their audiences – promoting lifestyle and values alongside products. This is crucial, as 75% of Gen Z consumers[12] will end relationships with brands that run ad campaigns perceived as macho, racist or homophobic, highlighting the importance of values-led marketing with younger audiences.

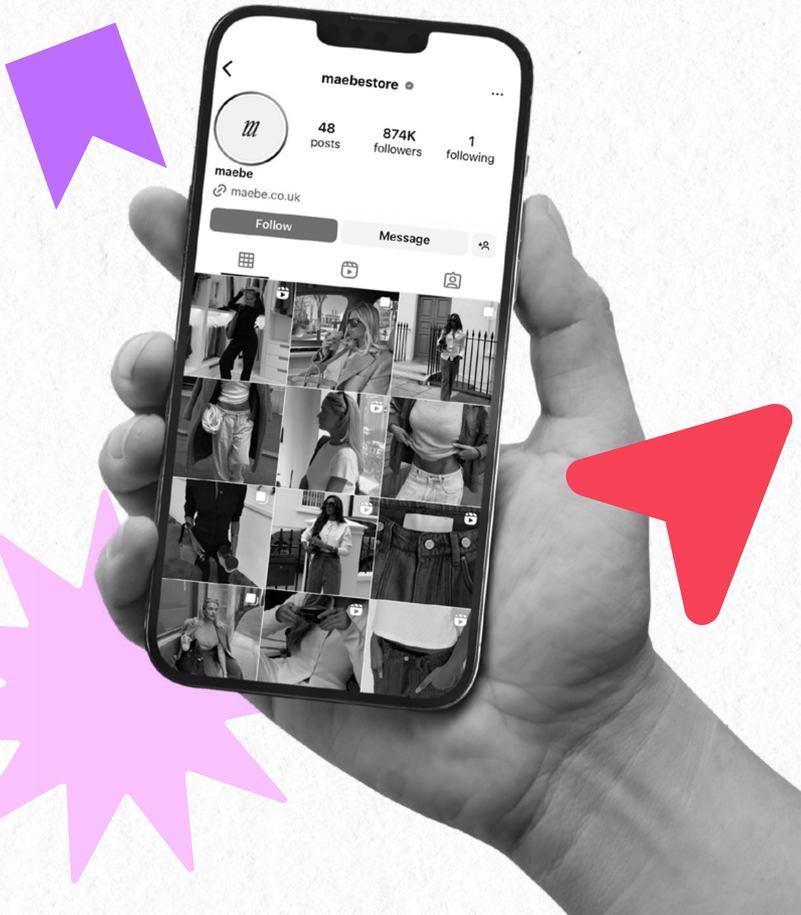
These influencers have successfully turned their personal brands into business empires by maintaining authenticity and engaging with their communities. Jess Hunt uses her beauty routines and tutorials to promote Refy products, while Grace Beverley emphasises sustainability and transparency with Tala, engaging followers in discussions about ethical fashion. Similarly, Molly-Mae's relationship with her fanbase has translated into loyal customers for Maebe – the first collection sold out in 24 minutes.

Brands like this are often at the forefront of innovation when engaging communities in real life. This is evident through the success of Maebe's pop-up, which was carefully crafted to reflect Maebe and founder Molly-Mae's aesthetic. Refy's recent community brand trip is another key example of this; rather than focusing solely on influencers for promotion, Refy invited dedicated customers to their brand trip, creating a more authentic and inclusive experience. This approach allowed the brand to engage with real users directly, strengthening community bonds and fostering genuine brand loyalty.

Authentic brand voice
As we look ahead, community management is no longer just about moderation and customer service – it's about defining a brand's voice in the cultural zeitgeist. The brands that will thrive are those willing to embrace humour, engage authentically with their audiences, and use social media to tap into broader trends.

While there is always a risk of being 'too funny' or 'too cringe,' the reward is clear: brands that master the art of community engagement are not just building followers – they are building cultural relevance and long-term loyalty.



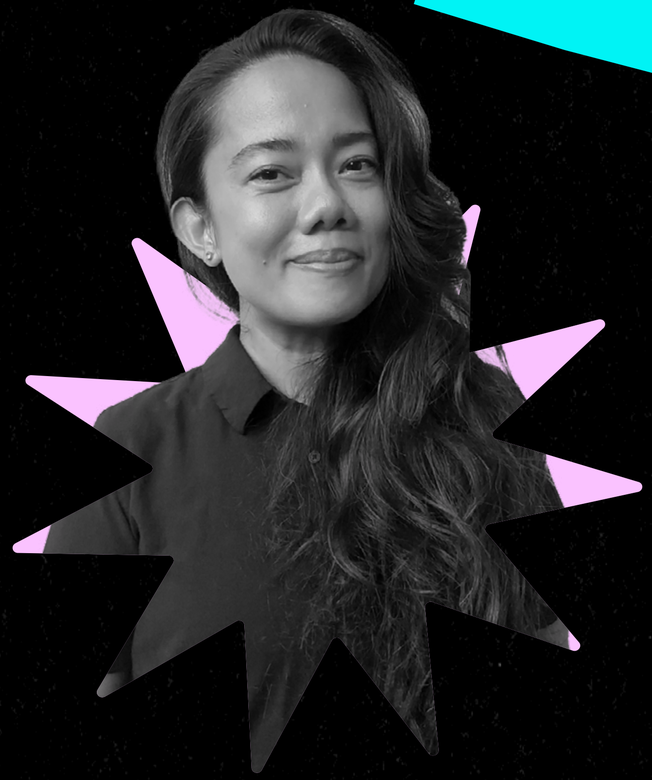


75%
of Gen Z consumers will end relationships with brands that run ad campaigns perceived as macho, racist, or homophobic

DARK SOCIAL

Social media isn't always so... social. 'Dark social' is becoming one of the most popular forms of online communication. **Emma Hurley** and **Elka Requinta** discuss how more platforms will be adjusting to privacy as the new social luxury.





Since Battenhall started tracking social media trends in 2013, a clear shift has changed the landscape: social networks have added private messaging functionality, while private messaging apps have launched social functionality. This crossover has pushed private communication to the fore, with apps like Snapchat and Telegram shaping consumer culture and society. As these apps continue to make headlines, we look to 2025 and ask: how will 'dark social' shape overall social media use and how it can be harnessed?

What is dark social?
Coined in 2012, dark social[13] refers to social media content that's not publicly available. This includes activity on private messaging apps, closed social media channels, groups, emails and web traffic sources. While tracking and measuring dark social has been notoriously challenging, its growing use for sharing and engagement means we are seeing more data from platforms – such as WhatsApp shares on TikTok. Some of the older networks have even started shifting their focus, features and algorithms in response to this user behaviour.

Where are these conversations happening?
A little over a decade later[14], 95% of content-sharing activity occurs on dark social. This shift from public to private sharing can partly be attributed to the stress and anxiety from social media's pressure to be perfect. In this context, privacy and exclusivity are the new social luxuries.

Social media marketers are developing creative strategies to measure activity on dark social: URL shorteners, referral links, upgraded social listening strategies, and even creating brands' own closed and niche communities across several platforms. With an improved user experience, industries such as media and sports thrive in this space.

Major platforms are also adapting to the trend. In 2021, Meta's chief Mark Zuckerberg talked about Facebook's 'privacy-focused vision for social networking' as private messaging and smaller groups became its fastest-growing areas. Instagram head Adam Mosseri has echoed this sentiment[15] in the case of 'sends', stating clearly that DMs are more popular than the feed.

As social media habits turn more compartmentalised, dark social is emerging as the ultimate space for deeper, more authentic conversations and other social activities online. This deep-dive explores key platforms and features where the conversations happen and how brands can engage effectively in this safe space.

'Dark social' refers to social media content that's not publicly available

PLATFORM SPOTLIGHT: HOW ARE PLATFORMS AND TOOLS ADJUSTING TO MEASURE DARK SOCIAL?

Tech company	Dark social adjustments	Platforms
Meta Telegram	Broadcast channels in DMs	Instagram Telegram
Meta	Broadcast channels outside DMs	WhatsApp
Meta Snap ByteDance	Sends/shares	Instagram Threads Snapchat TikTok
Meta	Notes feature in DMs	Instagram
Advance Publications Meta Snap	Private communities	Reddit Facebook WhatsApp Snapchat

Source: *Social Media Today*

WHERE ARE THESE CONVERSATIONS HAPPENING?

Platforms	Discord	Facebook Messenger	Snap	WhatsApp	Telegram Messenger	Reddit
Total no. of people using once a day OR more than once a week	267,736,225	1,192,765,795	628,136,209	1,542,191,220	1,639,081,978	288,476,390
Gen Z Millennials Gen X Baby Boomers Silent Gen Greatest Gen	140,644,983 83,246,237 40,745,362 3,082,387 34,401 109	320,313,922 446,517,213 359,535,080 64,889,170 3,015,304 5,541	285,844,640 220,367,378 112,252,351 9,605,566 132,549 0	497,021,754 545,310,381 434,445,589 64,757,237 1,303,412 9,106	516,714,120 624,770,618 447,562,104 49,947,876 169,967 4,552	114,337,924 102,663,415 62,827,251 8,540,272 215,055 0

Source: *GlobalWebIndex - 2024*

BATTENHALL

ADIDAS' MOST DOWNLOADED POST IN SEPTEMBER...

Views	Likes	Comments	Shares	Downloads	Favourited	Whatsapp shares	Engagement	Duration
18.3M	2.7M	75.4K	927.9K	5.9K	342.1K	11.5K	20%	N/A



Adidas' most downloaded post in September

Platform spotlight: groups and communities (Reddit)
Reddit typically prefers its subreddit communities to remain public, allowing anyone to view conversations, which also contributes to search on Google. The platform has even started clamping down on private subreddits, banning moderators from being able to close older groups[16] – a tactic often used by communities as an act of protest. CEO Steve Ruffman has even hinted it may turn to paywalls for some subreddits.

Publishers, including the Financial Times, have been advertising on the site and incorporating commentary into its articles. In terms of authenticity, the platform is now being perceived as a (safer) space for honest and genuine product reviews. We're seeing the potential for consumer and media brands to find a sweet (and paid) spot on the platform in the future, although we fully expect Redditors to give their staunch opinions on any such plans.

Feature spotlight: DMs
Snap's recent Simple Snapchat launch streamlined Chats (Snapchat's version of DMs) to prioritise watching Snaps from friends, creators and publishers. This is testament to how the platform continues to emphasise the feature.

Similarly, Instagram insights show a growing trend for private/direct messaging across all demographics. Platforms are responding by adding new engagement features like Notes on the Instagram inbox, the WhatsApp Sticker on Reels, and a 'Social Library' for all the osts and Reels users receive via chat threads.

Meta now considers Sends/Shares a 'key focus' by providing metrics on the feature. Threads has joined in, allowing users to share posts directly to their Instagram contacts. Meanwhile, TikTok is also investing in its DMs following a steady increase in WhatsApp shares.

Battenhall's Insights team took a closer look at German apparel and footwear company adidas and found a noticeable increase in its WhatsApp shares. One standout post resulted in 5.9k downloads and 11.5k shares. (See full post stats above and creative, right.)

Feature spotlight: broadcast channels (IG and WhatsApp)
Instagram introduced broadcast channels for creators with over 10k followers a year ago, gradually expanding features such as IG Live broadcasts, custom emojis and themes. The platform also started rolling out the feature to business accounts for brands to create an exclusive chat experience for loyal followers.

> **The sporting world is particularly active on channels**

Brands such as Louis Vuitton and Nike use their IG broadcast channels to highlight creator partnerships and share behind-the-scenes content with fans, including video clips and voice notes from fashion shows.

UK literary award The Booker Prize experiments with in-the-moment trends: over the summer, it used Brat-themed polls, links and memes to engage its 3.6k members. While it doesn't have the largest broadcast channel, it regularly gets hundreds of members interacting with its posts.

WhatsApp Channels, introduced by Meta in 2023, serves as a one-way broadcast tool for brands, creators and news organisations to send text, photos, videos, stickers and polls to followers. The feature, available to WhatsApp's 2.8 billion global users, is particularly popular in India, Brazil and Indonesia. Unlike Telegram, WhatsApp's Channels are less intrusive. They are organised in the Updates tab instead of the Chats tab, where personal conversations and groups are featured.

The sporting world is particularly active on Channels, with popular teams amassing huge followings. Real Madrid shares updates, match results, highlights and competitions on its WhatsApp Channel, attracting over 63 million followers. The Indian Cricket Team engages its audience of 11 million with videos from the men's and women's teams in action.

A caveat for dark social
The dark social phenomenon isn't without its concerns. Left unchecked by a wider public, misinformation and questionable activities – ranging from organised crime to harmful discussions about a brand or event – can proliferate. There are also more reported cases of victims falling for cybercrime and fraud due to the perceived lack of accountability on the more private platforms.

Nevertheless, France's recent skirmish with Telegram CEO Pavel Durov (he was arrested and forced to pay €5m bail) shows that more regulations aimed at bringing greater transparency and accountability to private digital spaces are being considered.

Brand action: using the 'Joy of Missing Out' to your advantage
The race to successfully track dark social will heat up in 2025. Dark will no longer be 'dark', as more platforms give private channel owners access to more performance insights to keep relevant in the new social order. Get these three steps right for your audience in 'JOMO' mode, and you might just win the hearts and minds of more (private) social users...

The race to successfully track dark social will heat up in 2025

1. KEEP YOUR EAR TO THE GROUND
Continuous social listening is crucial to understanding the ever-changing behavioural landscape of your target audience. If a private group or community has been created about your brand, dive into why this exists and what they're discussing.

2. OWN THAT (PRIVATE) CONVERSATION
Brands must recognise that joining conversations and tapping into closed groups can benefit them in a safe way. This is an opportunity to build trust and loyalty.

3. COMMUNITY-BUILDING = LIFE
Consumers won't follow brands into their broadcast channels unless they feel valued. This could mean tweaking your content plans, which must differ from what you usually share on public-facing social media channels.

As audience intelligence becomes crucial for meaningful strategies, it's time to embrace the changing dynamics of dark social. While brand safety is a key consideration (leave that to your agency!), being proactive and adaptable will help you best support, engage, and win over your communities.

SOCIAL SORTING

Battenhall CEO and founder **Drew Benvie** is seeing a big pecking order rejig as established social apps jostle with newcomers to fill the Twitter void in 2025



There's a social sorting happening right now, with people testing and adjusting multiple social networks in various ways in an attempt to replicate the live feed that was Twitter at its best. This social sorting has been going on for a year, but is only now kicking into another gear. It will reshape the face of social in 2025.

Seismic shifts are shaping the use of major social networks and newer platforms. Users are rethinking their choices: which networks to use? How to use them? Who to follow? Brands face similar 'sorting' decisions: where should ad spend be allocated? What platforms present an issue for brand reputation? And which networks are priorities for community-building?

A perfect storm is brewing: users are being buffeted by rapid developments in the social media ecosystem (like Twitter/X's decline), the fast growth of alternatives, tightening regulation of teen social media usage, and new laws for social media safety.

THE X-ODUS

The rapid decline of X[17] (formerly Twitter) in 2024 has already impacted its most active communities: media, politics, technology, and sports. Once the doyen of the world's biggest brands, media organisations, and ad dollars, X has seen its usage in the UK decline by a third since May 2023 and by a fifth in the US. New data[18] suggests that its revenue will fall to $2.9bn in 2024 from $4.4bn in 2022 – a 34% decrease.

Those figures haven't been helped by Brazil's ban of the platform in August, or more recently CEO Elon Musk's role in the promotion of the Trump campaign in the recent US elections, and his new role in Trump's office.

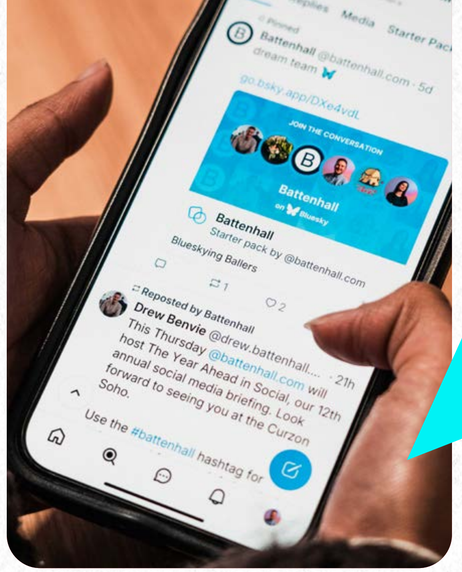
Users are looking for viable alternatives. A new order has emerged: from LinkedIn to Instagram and a new breed of competitors, such as Threads, Bluesky, and Mastodon.

CLEANING UP

Alongside the X-odus, regulators and lawmakers are ramping up efforts to protect younger social media users. The UK's new Online Services Act, led by empowered regulator Ofcom, is a key example. Australia and some US states are planning to introduce laws safeguarding younger teens' use of social media. In February, the European Union implemented the Digital Services Act (DSA) to create a safer digital space across member countries.

This has sparked a change in the social media ecosystem. Meta has announced the launch of Instagram Teen accounts to protect younger users, and for the first time, X released data on its approach to online safety.

Brands seeking to reach younger audiences through social media must change their strategies as algorithms and apps evolve to align with new regulations.





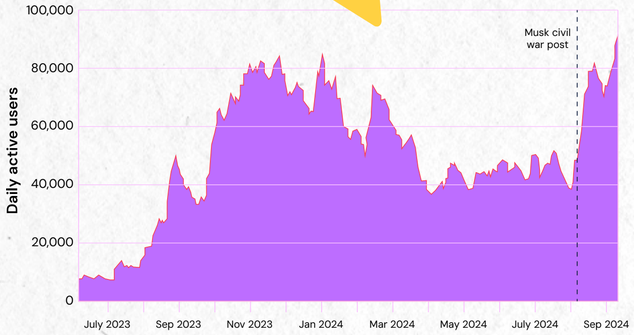


> Users are looking for alternatives... from LinkedIn to Instagram and a new breed of competitors.

THE BRAZIL EFFECT

When X was banned in Brazil in August 2024, a nation of over 180 million Brazilian social media users turned to alternatives, prompting a global shift. Threads, Kwai, and Bluesky saw a surge of new users, and while some are direct Twitter clones, others are markedly different.

Bluesky saw rapid user growth after Elon Musk's post on X warning that civil war was inevitable in the UK due to immigration



Source: similarweb

Brazil's X-odus reminded the world's social media communities that change is good, sparking a chain reaction across global markets and niche networks. In regions like India, where platforms like X have faced scrutiny over data privacy and content regulation, users have migrated to local alternatives such as Koo and ShareChat. Science communities are flourishing on Mastodon and booming on Bluesky.

A POST-STORM NEW DAWN

Looking ahead to 2025, the topic of social sorting becomes even stronger. Elements of it have already begun to take shape. You've likely already noticed it: LinkedIn is becoming more like Instagram, with frequent posts, personal updates and increased engagement. Meanwhile, Instagram is taking on LinkedIn's work/life feel as more work connections view your personal life in Stories.

Instagram is not LinkedIn.

Many users are sorting their networks and followers into a new order, some by pruning their follower lists, others by dropping some social networks altogether. Users are starting to do a bit of a 'deep clean' in sorting through their followers and changing things to streamline.

"I'm removing all people I don't know from my Instagram - Instagram is not LinkedIn," said prominent technology journalist and Editor-At-Large Mike Butcher MBE, on his Instagram.

"I don't want to post family photos on my LinkedIn; it's just cringe," said a business executive we spoke to.

Space is emerging among this sorting of networks for new communities, and Threads has been one primary beneficiary in recent months. Tech journalist Casey Newton, who has more than 100,000 subscribers to his tech newsletter Platformer, recently wrote: "My long-term bet is that Threads will win out over X, and all the reporters who are still posting to X will eventually wish they had built their audiences on Threads when it was still easier to do so."

Early signs are good, with Meta reporting more than 275m monthly active users on Threads and the app being the sixth most downloaded in August 2024 – Instagram and TikTok were #1 and #2, respectively. If this trend continues, with newer and more niche apps revisited by users and advertisers, we may see a new breed of social network emerge in 2025.

Here's what the social landscape looked like 5 years ago...

GLOBAL SOCIAL MEDIA USAGE

Monthly active users stats up to 31/10/19

Facebook	2.45 billion
YouTube	2 billion
WhatsApp	1.5 billion
Messenger	1.3 billion
WeChatXIN	1.1 billion
Instagram	1 billion
QQ	807 million
LinkedIn	645 million
Qzone	553.5 million
TikTok	500 million
Sina Weibo	465 million
Pinterest	300 million
Snapchat	210 million
Twitter/X	145 million

*LinkedIn only reports Total Users
**Snapchat only reports Daily Active Users
***Twitter now reports mDAU (monetizable Daily Active Users)

AND NOW... SOCIAL MEDIA PLATFORMS BY MONTHLY ACTIVE USERS

Facebook	3.065 billion
Youtube	2.5 billion
Instagram	2 billion
Whatsapp	2 billion
TikTok	1.5 billion
WeChat	1.37 billion
Messenger	1.3 billion
Kuaishou	1.1 billion
Telegram	950 million
Snapchat	850 million
Douyin	750 million
Sina Weibo	583 million
QQ	571 million
X	570 million
Pinterest	522 million
Reddit	430 million
LinkedIn	310 million
Threads	200 million
Kakao Talk	53 million
Bluesky	22 million
Mastodon	1.5 million

HOT NEW THING?

Let's examine some of the newest emerging networks and how they could shape social media in 2025.

BLUESKY

What is it? Think Twitter, but good again. Bluesky is eerily similar to what the OG social media crowd will recall Twitter was like back in the late 2000s when it first became popular.

Bluesky was first conceived by Twitter's original co-founder, Jack Dorsey, back when he was still running Twitter in 2019. He designed it to be a decentralised social network, meaning that it it is interoperable with other social networks, and customisable by its users.

As a decentralised social network, Bluesky is part of the 'fediverse', meaning other platforms in that space, such as Mastodon, can connect with Bluesky users.

Who's on it? Over 22 million registered users are currently using Bluesky (as of 25 November 2024), with user numbers having been growing by over 1 million daily, a number that matched even Threads' user growth in 2024. Growth in 2024 seemed to increase during key moments of X/Twitter user unrest, such as when X changed its block button functionality, when Brazil blocked X temporarily, and most recently when Donald Trump was named President Elect, in part due to X owner Elon Musk's actions.

More recently, a number of vocal communities that had previously flourished on X/Twitter, such as journalists, with a measured increase in journalist and media accounts on Bluesky coinciding with The Guardian's announcement in November 2024 that it would cease posting to X. Scientists have also begun flocking to Bluesky.

Use it if your brand is... targeting media, science, technology or the communications and marketing communities that previously found Twitter such a vibrant community.

BUTTERFLIES

What is it? Former Snap engineer Vu Tran launched a new social network in June. It's a blend of human and AI users and allows interaction via posts, comments, and DMs. Users can create their own AI friends called 'Butterflies.'

Who's on it? AI and tech mavens looking to experiment in the space, and digital natives.

Use it if your brand is... heavily involved in the tech, social, or entertainment space. It could be a good testing ground to see if and how humans and AI accounts become a regular part of social media and marketing.

THREADS

What is it? Meta's Instagram-powered Twitter/X alternative

Who's on it? Community-focused Gen Z and millennials. Fashion and entertainment influencers, business leaders looking for insights, gamers, educators, and mental health advocates. Some media are now making the move from X.

Use it if your brand is... already on Instagram and is looking for another effective town hall-style platform to house on-the-go announcements and company news 'humanising' the brand. Also presents an opportunity to cross-promote to other platforms on the 'fediverse' in the future. Like Twitter, you can join conversations about topics that resonate with your brand's key messages. It has recently added custom lists in a bid to compete with Bluesky.



REFERENCES

Social-first everything

1. Ofcom (https://www.ofcom.org.uk/media-use-and-attitudes/attitudes-to-news/tv-loses-its-crown-as-main-source-for-news/) September 2024
2. Campaign (https://www.campaignlive.co.uk/article/social-overtakes-search-adspend-landmark-global-shift-warc-media/1871352#:~:text=Social%20media%20is%20now%20the%20largest%20channel,in%202024%2C%20up%2014.3%%20year%20on%20year) 2024
3. BBC, (https://www.bbc.co.uk/news/articles/c4gzd62g1r3o), November 2024
4. Statista (https://www.statista.com/statistics/617136/digital-population-worldwide/#:~:text=As%20of%20July%202024%2C%20there,population%2C%20were%20social%20media%20users), 2024
5. Morning Consult (https://later.com/blog/gen-z-social-media-usage/), February 2024
6. Reuters Institute (https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/dnr-executive-summary), 2024
7. WARC (https://www.marketingdive.com/news/warc-global-ad-spend-top-1-trillion-this-year-2024/725198/#:~:text=Dive%20Brief%3A,by%20artificial%20intelligence%20(AI)), 2024
8. Vogue Business (https://www.voguebusiness.com/story/consumers/gen-z-broke-the-marketing-funnel), 2024
9. Shopify (https://www.shopify.com/enterprise/blog/social-commerce-trends), 2024

Social intelligence

10. Censuswide (https://censuswide.com/report/), September 2024

Culture and Community

11. HubSpot (https://blog.hubspot.com/blog/tabid/6307/bid/23865/13-Mind-Bending-Social-Media-Marketing-Statistics.aspx), 2022
12. McKinsey (https://www.mckinsey.com/industries/retail/our-insights/the-diversity-imperative-in-retail), 2021

Dark social

13. The Atlantic (https://www.theatlantic.com/technology/archive/2012/10/dark-social-we-have-the-whole-history-of-the-web-wrong/263523/), 2012
14. Sparktoro (https://sparktoro.com/blog/new-research-dark-social-falsely-attributes-significant-percentages-of-web-traffic-as-direct/), 2023
15. Social Media Today (https://www.socialmediatoday.com/news/instagram-chief-reiterates-sends-now-key-focus/720531/), July 2024
16. CNET.com (https://www.cnet.com/tech/services-and-software/reddit-prevents-mods-from-making-subreddits-permanently-private-or-nsfw/), October 2024

Social sorting

17. FT.com (https://www.ft.com/content/65961fec-a5ab-4c71-b1c8-265be3583a93), September 2024
18. Social Media Today (https://www.socialmediatoday.com/news/x-formerly-twitter-could-post-a-significant-loss-in-2024/730370/), October 2024

ABOUT BATTENHALL

Experts in social media, AI, data and insights, strategy, content and creative, Battenhall advises global brands, organisations and pioneers.

To learn more, head to:
battenhall.com, Instagram, Bluesky, LinkedIn, Threads, Twitter/X and TikTok