Executive Summary

Social media is an ever-changing landscape. Every year, new networks appear, legacy networks vanish, and the way users interact with any given network can vary dramatically. Compound normal changes with increasing scrutiny and governmental oversight, and social media can quickly become a bewildering challenge to plan your marketing against.

In this study, we forecast the interest by users in the major social networks based on search volume and provide actionable guidance throughout on what marketers should focus on in 2020.

Two key trends emerge from the data, detailed in the rest of the paper: **velvet rope communities** and **YouTube dominance**.

**Velvet rope communities** such as Slack and Discord provide safe havens for users who want to associate with like-minded individuals without the normal rancor and incivility in the major public social networks. These communities are powerful but largely closed to marketers unless they are introduced by trusted community members, or marketers found their own communities.

**YouTube**, already a giant property with multiple functions, is slated to become even more powerful in 2020 as users engage with more and more video content. For marketers, YouTube provides detailed, robust analytics which make managing and growing channels easier. Any brand seeking social media effectiveness in 2020 must have a solid YouTube strategy as part of an overall social media strategy.
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Methodology and Disclaimers

Trust Insights undertook a multi-part set of techniques to extract the information in this paper. We began by using Talkwalker’s social media monitoring platform to find other social networks that are related to the primary networks most people are aware of (Instagram, Facebook, etc.) based on conversations over a 3 month period (May 19, 2019 - August 23, 2019). This provided a list of named social networks.

Once we acquired the network names, using Talkwalker, we checked conversation volume around terms like “Delete Facebook” etc. to assemble a list of common terms for someone signing up for a social network and someone quitting a social network. This provided a list of known terms for account creation and account quits.

We then crafted custom permutation software to create every possible variation of the account creation and quit words, along with the networks themselves and related words such as account, profile, app, etc., a list of over 1,000 combinations.

Figure 1. Talkwalker Quick Search topic scan, associated brands.
Using the AHREFs SEO software, we scanned each combination for the number of searches per month, deleting search phrases with no search volume.

Using our custom time-series forecasting software, AHREFs search volumes, and Google’s 5-year historical search trends data, we forecasted each term’s likely volume for 72 weeks (until January 3, 2021) to project the likely changes in volume for each term.

A key point to note is that all the data in this report is based on these searches. We do not incorporate at any point the publicly-listed numbers found in SEC filings for publicly-traded companies because not all social networks are publicly traded, or are part of other, larger entities (for example, Microsoft owned LinkedIn and does not publish detailed metrics), making apples-to-apples comparisons impossible.

As such, do not use this data for investment purposes or other significant financial projections without consulting other data sources and qualified financial investment professionals.

Disclaimer of Warranty

Trust Insights provides all data “as is” without warranty of any kind, either expressed or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. The entire risk as to the quality and performance of the data and your uses of it is with you.
Definitions

**Account creation**: search words and phrases dealing with account creation such as *install, set up, download, sign up, open, create, or new*. Examples: new Snapchat account, open Tiktok profile

**Account quit**: search words and phrases dealing with account deletion such as *delete, uninstall, deactivate, remove, quit, close, disable, cancel, remove, or leave*. Examples: Snapchat delete profile, Instagram close account

**Decile**: a ranking of a dataset in 10 partitions. The top 10% of a dataset would be the tenth decile. The bottom 10% of a dataset would be the first decile.

**Search**: a search is defined as a word or phrase (a query) an individual user types into a search engine such as Google, Bing, etc. for the purposes of obtaining more information about the search query.

**Social network**: a social network is defined as a digital platform or destination whose value is contingent upon the participation of individuals in the creation, engagement, and sharing of content. Social networks exhibit network effects as their primary source of value; the more people who use a network, the more valuable it becomes, and the majority of content comes from users.

**Velvet rope social media**: social media channels which are private, gated communities that the general public has no visibility into.
Social Networks Glossary/Reference

- **Facebook**: the largest overall social network, which feature both public and private news feeds/groups
- **Twitter**: a microblogging/news platform where updates are publicly shared in 280-character posts
- **Instagram**: a photo and video sharing platform where updates are publicly shared for the most part, owned by Facebook
- **LinkedIn**: a professional publishing and career platform which feature both public and private news feeds/groups
- **Discord**: a private chat system, used heavily by the gaming community, that features chat rooms and individual instances called servers with no public feed
- **Slack**: a private chat system, used heavily by businesses, that features chat rooms and individual instances with no public feed
- **Twitch**: a video streaming platform used heavily by gamers to livestream their game play
- **Reddit**: a threaded discussion platform which feature both public and private news feeds/groups called subreddits
- **WhatsApp**: a private messaging and voice over IP telephone and text messaging platform with no public feed, owned by Facebook
- **Tiktok**: a video sharing platform where short updates, typically accompanied by music, are shared publicly
- **Snapchat**: a photo and video sharing platform where updates vanish after a certain period of time, featuring both public and private messaging
- **Pinterest**: a photo, video, and media sharing platform with public and private groups called boards
- **Telegram**: a private messaging app with no public feed and strong cryptography, used heavily by startups, cryptocurrencies, and Silicon Valley folks
- **WeChat**: a massive, all-in-one messaging, shopping, commerce, and sharing platform based in China that does pretty much everything
- **QQ**: a messaging, sharing, and web portal (also known as Tencent QQ) that provides access to media, music, and other entertainment in China
- **Viber**: a private messaging and voice over IP telephone and text messaging platform with no public feed, heavily used in Japan
- **Medium**: a blogging platform with social network integration, known for its longform text content
- **Mixer**: a video streaming platform used heavily by gamers to livestream their game play, owned by Microsoft and used heavily by Xbox players

*Action step: if you see a platform in this list you aren’t familiar with, but seems like it might be relevant to your business, sign up for it and get to know it.*
Key Findings

Account Creation Search Volume

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*Figure 2. Social network account creation search volume by year. Darker backgrounds indicate higher search volumes.*

When we examine the past 5 years and the forecasted search volumes for the various social networks, we see that overall, **YouTube** still remains one of the very largest platforms for account creation. While its growth has tapered in the past few years, it still is larger than its nearest competitors.

Accounts that are showing significant forecasted growth by volume in 2020 include **Discord**, the consumer gaming-centric chat platform (similar to Slack), **Instagram, Facebook, and Slack**.
On a year-over-year percentage growth basis, we see Chinese music app Tiktok continuing to grow leaps and bounds, with a forecasted 591% growth rate in 2020. Other networks that evince growth are Reddit, Twitter, Instagram, and Twitch.

At the bottom of the pile, Viber, Snapchat, QQ, Facebook, and Medium are all showing forecasted negative year-over-year growth.
On the account quit side, we see Instagram, Facebook, Snapchat, and Tiktok heading up the quit search volumes. Certainly, Facebook’s premier properties have been the subject of many delete campaigns among users in the past, and it’s no surprise to see them top the list again in 2020.

Of note and interest is the decline in volume of Twitter quit searches, from a high of 901,306 in 2015 to a forecasted 177,266 in 2020. While Twitter may not be the largest social network, it appears to be doing a good job of reducing churn/quits. Twitter recently confirmed this finding in its July 26 quarterly earnings call.1

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### Social Network Account Quit Searches Y/Y Growth

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**Figure 5.** Social network account quit search volume year over year change. More blue backgrounds indicate growth of search volumes. More orange backgrounds indicate contraction in search volumes.

On a volume basis, we see substantially greater volume in percentage quitting for Tiktok, Telegram, Reddit, and Slack. Tiktok’s quit percentage growth is especially noteworthy; it indicates that users are abandoning the platform at significantly greater rates than it is acquiring them. The implication of this finding is that Tiktok may be today’s darling, but its days may be numbered if it can’t keep users.
Net Changes In Search Volume

To finish our examination, let’s take the final forecasted numbers for 2020 and evaluate which networks are likely to experience net growth, where the number of searches for new accounts exceeds the number of quits.

We see **YouTube**, **Discord**, **Slack**, and **Twitch** with net forecasted growth for 2020. We see **Instagram**, **Facebook**, **Snapchat**, and **Tiktok** with net forecasted decline for 2020.

**Action step:** if you lack familiarity with **YouTube**, **Discord**, **Slack**, or **Twitch**, take immediate steps to become familiar with them. Set up accounts, learn the ecosystems and how they work, and participate/observe the networks in action.

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Social Networks 2020 is a joint publication of Trust Insights and Talkwalker. Learn more at TrustInsights.ai and Talkwalker.com.
Insights and Action Steps

What do the major changes show? Fundamentally, we see the continuation of a trend that began several years ago, but has picked up in earnest: the continued rise of velvet-rope social media communities, private communities and collectives. In short, people want to spend time with people more like them, with a common interest, rather than in the general public where discourse has descended to rancorous incivility.

Facebook itself attempted to stay in front of this trend with recent algorithm changes to promote groups, but its changes appear too little, too late. The networks which are growing in terms of search interest are networks like Discord and Slack, which permit private instances of curated individuals to interact without the noise and perceived hostility of public social media.

We see YouTube’s continued dominance in all things video, making it the premier destination for anyone who wants to interact with videos. The fact that it is still accruing so much net search interest despite being founded almost a decade and a half ago is nothing short of amazing.
Implications of Velvet Rope Community Dominance

One of the key implications of velvet rope community dominance in social media marketing is our absolute lack of available data. Unlike ad-powered networks such as Facebook, Twitter, and LinkedIn, private networks neither support nor encourage any kind of URL tracking. Traffic coming from a link shared on, say, Slack or Discord will show up in Google Analytics (or other equivalent analytics platforms) as direct / no attribution, the same as if the user had typed it in directly.

The savvy marketer, therefore, must treat velvet rope communities almost as offline word-of-mouth communities. Unless the marketer is an active participant in a given community, there’s no guarantee that users will share links on behalf of a company. Like offline, we will need to rely on seeing the effects of velvet rope communities in indirect ways, such as branded organic search. Some efforts can be made to track, if custom, easy-to-remember URLs are part of the marketer’s repertoire.

**Action step: if you don’t already have rigorous, robust marketing analytics governance and processes in place, now is the time to set them up. They’ll be essential for getting as much data as possible from an ever-increasingly fragmented, otherwise-untrackable media landscape.**

To give a sense of this trend, we examined the number of new, unique Slack subdomain backlinks daily using the Ahrefs SEO tool. Every Slack instance is part of the overall Slack domain, but has a unique URL. For example, the Trust Insights corporate Slack instance is trustinsights.slack.com. In the prior 60 days to publication, we detected an average of 138 new Slack instances per day:
The key question to ponder is - of those instances, which ones are relevant to you as a marketer, and how would you go about, if possible, gaining access to them.

**Action step:** use the SEO and social media monitoring tools of your choice to find and engage with relevant private communities, if they will accept brand representatives as members.

From Influencers to Ambassadors

A key concept to understand, in the world of velvet rope communities, is that influencers as we currently understand them (typically individuals who create content frequently and have a very large, public following) will become less influential as more audience members seek private communities. Certainly, major celebrities and public personalities will continue to be prominent; however, for companies marketing with smaller influencers, impact and ROI is likely to decline.

Conversely, the rise of private communities requires someone to either represent brands and companies in relevant communities, or invite brand representatives into those communities.

**Action step:** get ahead of the curve by working with your current influencers and brand advocates, converting them to the role of ambassadors to help you understand and enter relevant private communities, especially if brand representatives are unwelcome.
Next-Level Employee Advocacy

Who are the true experts who can bring value to a community? Chances are, you have a stable of them already - your employees. No matter what niche or industry your company occupies, in order to successfully offer products and services to your market, you need to have some subject matter expertise - and that expertise can be leveraged for participation in velvet rope communities.

However, doing so requires rethinking employee advocacy. Companies and vendors have diluted the meaning of employee advocacy, especially with regard to social media, to be little more than unpaid advertising on employees’ personal social media accounts. This tactic is often ineffective and even personally objectionable to employees.

Next-level employee advocacy is about sending employees who have subject matter expertise to join private communities (where appropriate) to participate in conversations, offer their expertise, and build brand on behalf of the company within the velvet rope communities in your industry.

*Action step: identify which employees have true subject matter expertise, then provide training and expectations on behaviors in velvet rope communities, and allocate time for them to participate in the communities on behalf of the brand.*

Build Your Own

The expert marketer should already, or as soon as possible, curate a velvet rope community of their own. Using platforms like Slack, Discord, or for highly-regulated industries, self-hosted MatterMost, marketers can create a welcoming environment for prospective and current customers to interact with as a work-safe alternative to public social networks, with the advantage of some level of analytics.

For example, Trust Insights manages and maintains the Analytics for Marketers Slack community, which permits us to create specific ground rules for community standards, enabling a welcoming, safe space for marketers.
Figure 8. Example private community on Slack.

**Action step:** start your own private community if you don’t already have one. If you do have one, increase your resource investment in it.
Implications of YouTube Video Dominance

With Instagram’s decline in search interest and potential loss of membership (including properties like its long-form video platform, IGTV), it’s once again YouTube’s game in video. For the savvy marketer, understanding what’s performing on YouTube is essential to taking advantage of the platform.

Using the Talkwalker platform and an analysis of a sample of 227,000 top videos shared on YouTube across categories in August 2019, we see engagement rates per video (dark blue bars) hovering between 2% and 7% - substantially higher than other platforms:

![Figure 9. YouTube video statistics for August 2019. All figures are median numbers. Purple bars are views, teal bars are engagement rates, green bars are engagements, blue bars are comments, and orange bars are description lengths. Chart split out by deciles ranked in descending order, from largest to smallest.](image)

However, unlike other social channels, YouTube’s power celebrities and influencers are very much concentrated in a powerlaw curve; the top elite hold most of the views and engagements.

**Action step:** benchmark your current YouTube performance, if available, based on the engagements/views ratio above. If your videos are underperforming, consider changing YouTube content strategies.

Social Networks 2020 is a joint publication of Trust Insights and Talkwalker. Learn more at TrustInsights.ai and Talkwalker.com.
Find Your YouTube Micro-Celebrities

One of the most important tasks for marketers to do will be to find the YouTube micro-celebrities in their vertical and focus on outreach to those channels for placed content, as well as growing their own YouTube channels. It’s important to remember that YouTube is three major channels rolled into one - a video platform, a social network, and a search engine.

As an example, let’s look at the overall top 100 YouTube producers by average (arithmetic mean) video views for the month of August 2019:

Top 100 YouTube Creators by Views, August 2019 :: Analysis by Trust Insights.ai

These video creators are at the top of their game - and working with any of them, even if they were on-topic/relevant to a specific industry, would likely be incredibly costly.

On the other hand, examine this list of top 100 YouTube producers specifically on the topic of analytics, by average views for the month of August 2019:

Figure 10. YouTube creator statistics for the top 100 creators by average views. Red bars are views, orange bars are engagements, and blue bars are engagement rates.

These video creators are at the top of their game - and working with any of them, even if they were on-topic/relevant to a specific industry, would likely be incredibly costly.

On the other hand, examine this list of top 100 YouTube producers specifically on the topic of analytics, by average views for the month of August 2019:
Figure 11. YouTube creator statistics for the top 100 creators in the analytics niche by average views. Red bars are views, orange bars are engagements, and blue bars are engagement rates.

These numbers are much more down to earth and it’s likely you’d be able to build a relationship much more easily with some of these producers. In terms of goals for your own channel, these numbers are also much more achievable and practical than the millions of views of the overall top 100.

**Action step:** identify, using a media monitoring tool like Talkwalker, who the top creators in your industry or niche are, and start building relationships with them.

**Skill Up On YouTube Ads**

As YouTube’s reach and power grows, so too grows its capabilities to deliver audience with well-targeted video ads. Be certain you and your team have the appropriate skills and budget to make the most of YouTube as an advertising channel, and master the different ways consumers work with YouTube ads.
Traditional ad strategies may not apply to your company's YouTube audience; for example, bumper ads are a powerful branding tool but an ineffective lead generation tool. Other methods, such as search retargeting for YouTube ads, are novel concepts for traditional advertising marketers, blending multiple channels and techniques together and requiring new ways of thinking about advertising.

**Action step:** skill up on YouTube advertising by taking Google’s free YouTube advertising courses as part of Google Ads Academy. [https://www.youtube.com/ads/agency/](https://www.youtube.com/ads/agency/)

**Invest In Your Channel Growth**

While we often advocate that you should never build on rented land, YouTube’s ecosystem makes it especially challenging to follow that advice for video marketing. Video hosting requires enormous amounts of disk space and bandwidth; most marketers will be better off hosting content on YouTube and keeping local backups of video.

The real advantage of YouTube is the combined powers of its built-in social network and search engine. Marketers should be intensively optimizing every video they post to YouTube, following the most current best practices published by Google/YouTube, and then building a loyal community on top of great video content.

**Action step:** take Google’s free YouTube courses at its Creator Academy. [https://creatoracademy.youtube.com/](https://creatoracademy.youtube.com/)
Implications for Agencies

Agencies in particular will face great challenges from these overall social media changes. Companies that have made comfortable incomes and lines of business from the existing platforms may be challenged to adapt to these new realities of private communities and a YouTube-first content priority.

Key agency takeaways specific to our 2020 trends include:

- Ensuring you have the latest, most modern analytics tools (such as Talkwalker and AHREFS) to analyze the content and conversations in your verticals.
- Ensuring your team has the latest skills in techniques such as YouTube organic and paid campaigns so as to maximize the impact of every video you publish on YouTube on behalf of clients.
- Ensuring your existing influencer marketing techniques convert well to ambassador relationship building techniques, and your existing influencers can function as ambassadors.
Promotional Event

Want to dig into the research in greater detail? Have followup questions you want to ask? Tune into a webinar on September 24th at 1 PM Eastern Time as Trust Insights and Talkwalker dive deep into the paper, answer questions, and help you set strategy based on the results of this paper. Register now for the webinar:

https://www.talkwalker.com/webinar-signup-2?
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