

PULSAR*

The Great Fragmentation: Navigating the Splintered Web

How audiences relate to social media today

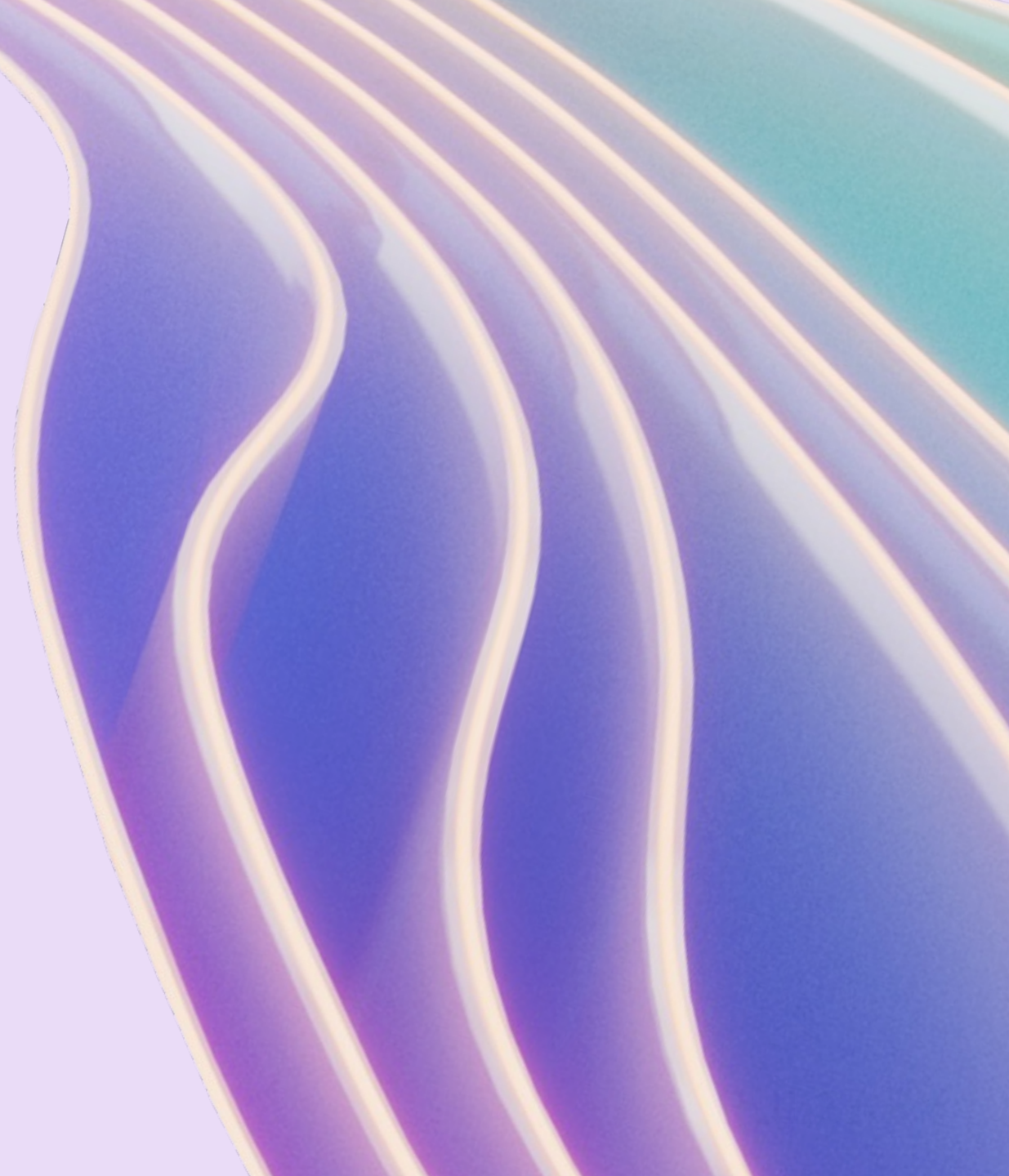
The new social landscape

We've been here before. In the middle of the 20th century, particularly in the US, markets and audiences were concentrated in the hands of a few major players across telecoms, automobiles and personal computing – until they weren't. Today, the same fragmentation that took place within these industries is happening to social media.

What's the impact of today's audiences having so much choice? For one thing, it casts greater attention on what makes these platforms so distinctive from one another. Because, as every social intelligence practitioner knows, these platforms are far from being the blank canvases that host the modern celebrity, community or consumer. Which platform you show up on, consume news on, or connect with people through is increasingly a major choice in personal selfhood.

As such, the 'brand' of each individual platform is more of a live issue than at any point in the history of social, informed by everything from user base, to functionality, to ownership, to what algorithm the platform uses.

Platform choice is now a form of identity signaling, meaning your brand must adapt messaging and tone to the cultural expectations of each platform.



What we're covering:

1. Where we are

How popular are today's apps?

The evolution of social media

Time spent on platforms

Where do brands show up?

2. Where we're headed

The Media-fication of social

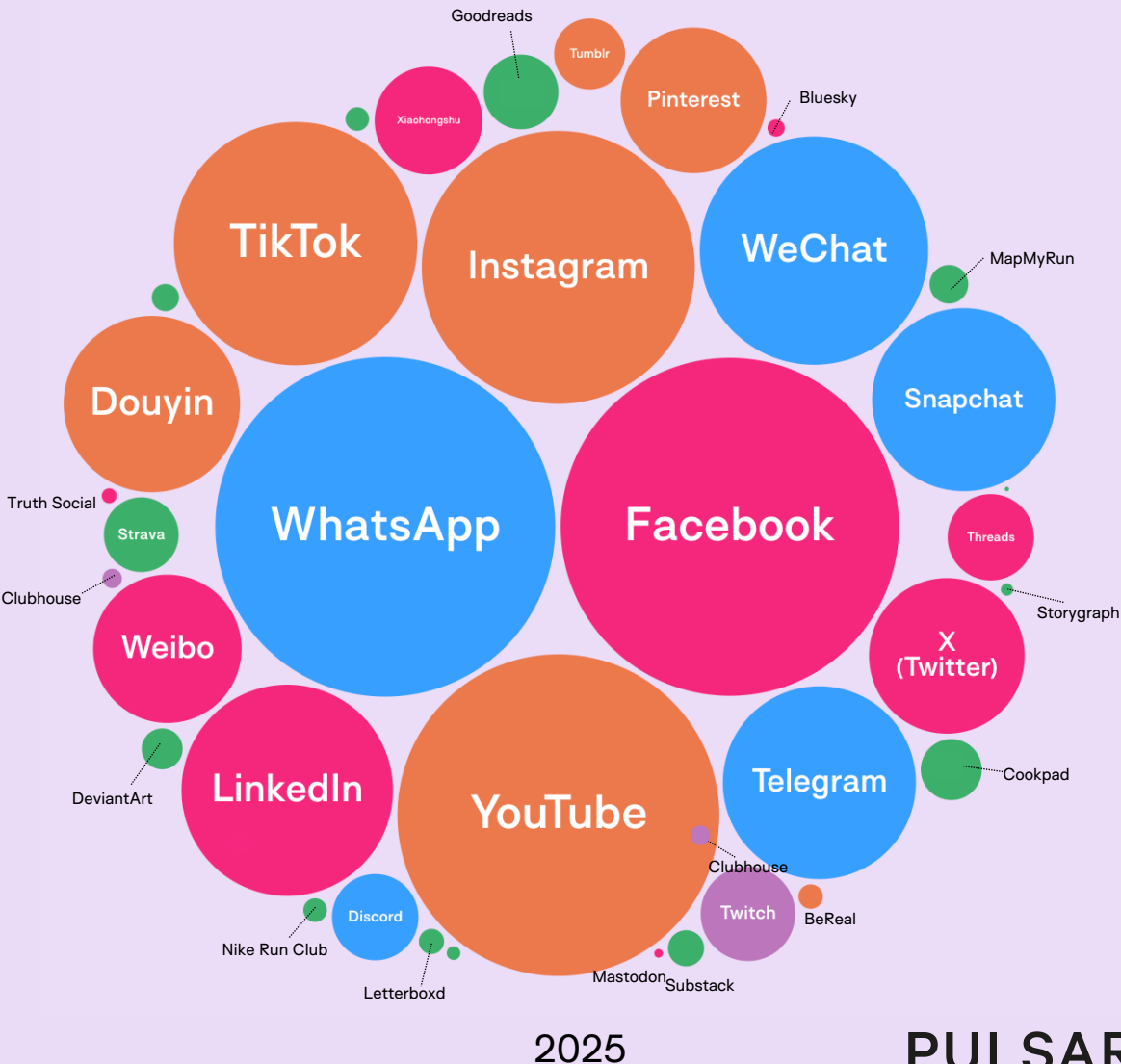
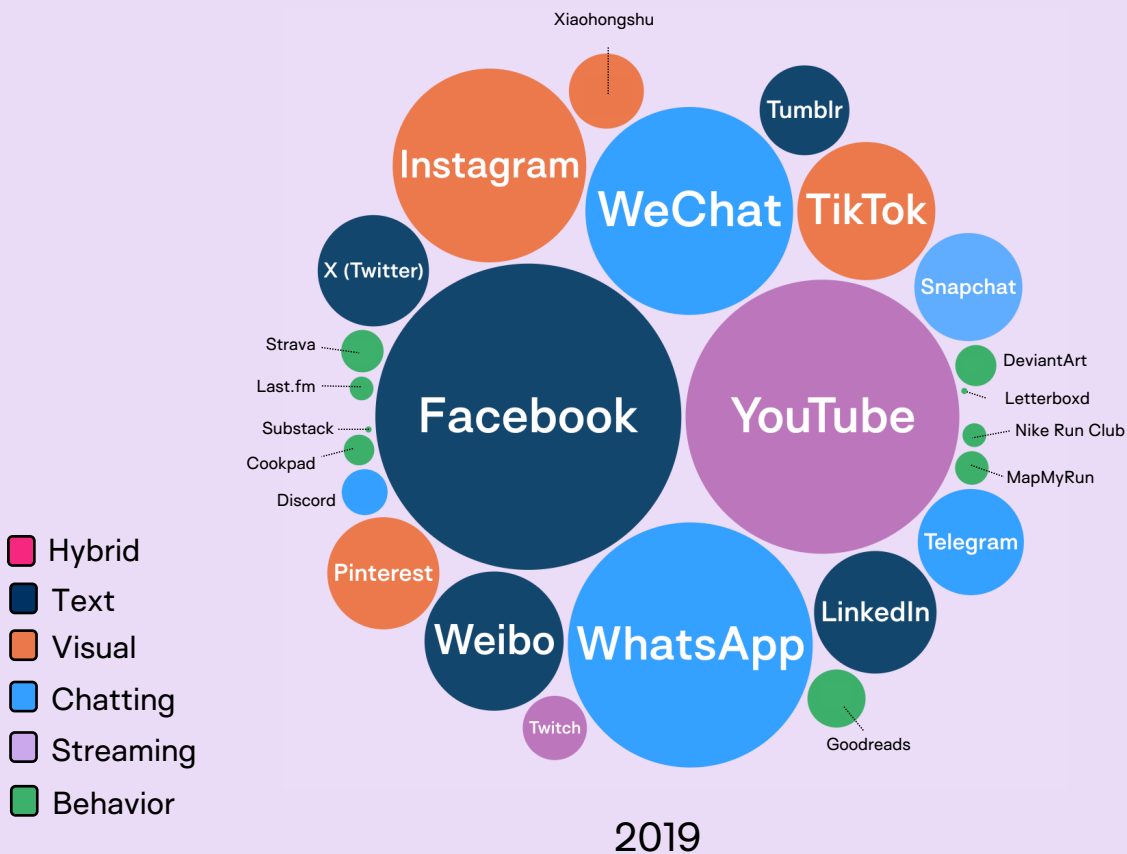
Fatigue & retreat

From scale to niche and identity

Where We Are – In a Social
Landscape That's Fragmenting

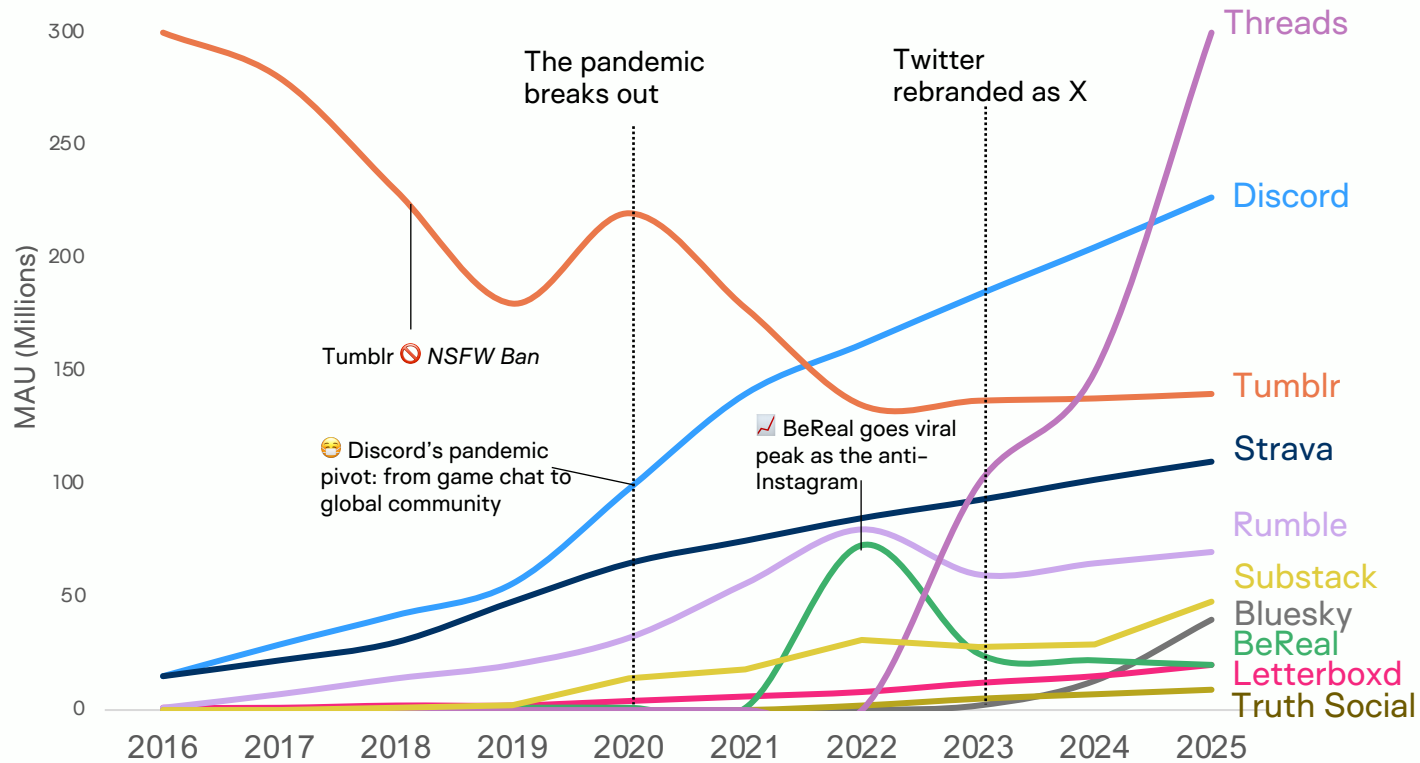
There are more platforms, and more users, than ever before

As the number of platforms has grown, they have also undergone something of a ‘same-fication’ of core features. Want to watch vertical video? Practically every platform will support this on some level. And so, the type of video you want to watch, and the communities you want to be surrounded by, becomes an increasingly prominent consideration on the part of audiences.



Comparison of social platform monthly active users between 2019 and 2025.
Sources: platform financial filings, DataReportal & eMarketer

Different platforms map onto different needs – and vibes



The New Social Frontier Through Time

Selected platform monthly active users between 2016 and 2025. Sources: platform financial filings, DataReportal & eMarketer

Top 5 social apps by user growth

1. Bluesky: +207%
2. Threads: +100%
3. Substack: +65.6%
4. Letterboxd: +33.3%
5. Truth Social: +28.6%

Users now evaluate platforms not just by features, but by the cultural “vibes” each one offers, shifting growth toward niche, purpose-built environments. They expect brands to understand the vibe.

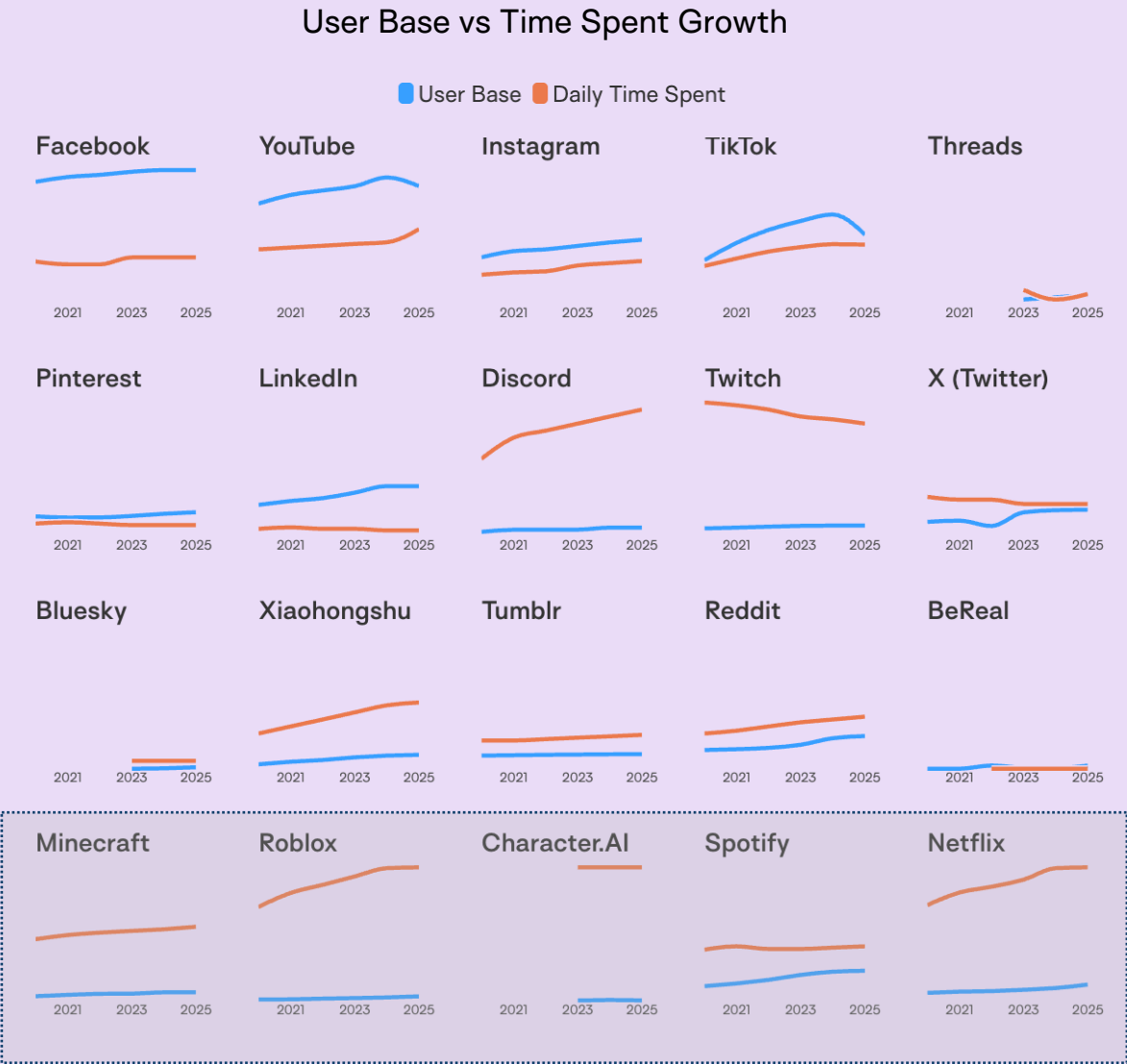
Even when the user base remains steady, time spent on platforms grows year-on-year

The average time spent on each platform is trending upwards. Different platforms serve different needs, displacing not just traditional forms of media, but also periods that might once have been ‘downtime’.

We’ve also mapped platforms that either already have social elements (Minecraft, Roblox, Spotify) or where it’s easy to see a social layer being introduced (Netflix).




















Time spent on social – and what counts as social media behavior – is expanding.

Social isn’t just expanding in user numbers—time spent and what “counts” as social behavior are broadening into adjacent categories like gaming, music, and streaming. As a brand, your job is to identify where high-attention behaviors occur and prioritize those environments for impact.



Active users and time spent across channels from 2020 to 2025, data normalized and estimated.
Sources: social platform official financial reports, DataReportal & eMarketer

Where do different brands show up across these spaces?

								
 Apple	35.1M	15.3M	9.9M	20.6M	6.4M	17.9M	0.2M	6.3M
 Microsoft	4.5M	13.4M	92.1k	2.2M	877.7k	27.1M	16.8k	1.5M
 Amazon	6.1M	5.5M	1.4M	991k	1.2M	35.8M	2.2M	0.1M
 Google	15.7M	35.7M	31.4M	13.7M	19.5M	39.8M	N/A	3.5M
 SAMSUNG	2.6M	163.4M	226.9k	7.7M	5.4M	39.5k	174.7k	447.5k
 TOYOTA	10.0M	482.1k	92k	77.8k	4.1M	2.3M	35.4K	249.4k
 Coca-Cola	3.2M	108.1M	2.8M	4.7M	2.3M	8.5M	39.7k	31.6k
 McDonald's	5.5M	82.8M	12.9k	8.5M	751k	2.3M	31.6k	99.4k
 Mercedes-Benz	39.3M	23.2M	3.9M	2.0M	3.6M	159.7k	40.5k	250.3k
 CISCO	576.6k	1.7M	721.8k	403k	167.3k	7.2M	N/A	103.3k
 LOUIS VUITTON	56.0M	25.4M	9.3M	5.4M	15.3M	3.2M	430.1k	814.5k

 Brand's biggest channel

Top global brands* by followers on social media

*Brands selected from Interbrand's Best Global Brands 2025

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Shift 1. Media-fication of Social

7%

of Instagram activity involves
sharing with friends

Many of the most established platforms no longer function as 'social networks', but as platforms for the creator economy, and one-to-many broadcasting.

Which platforms are perceived as 'broadcast' channels?

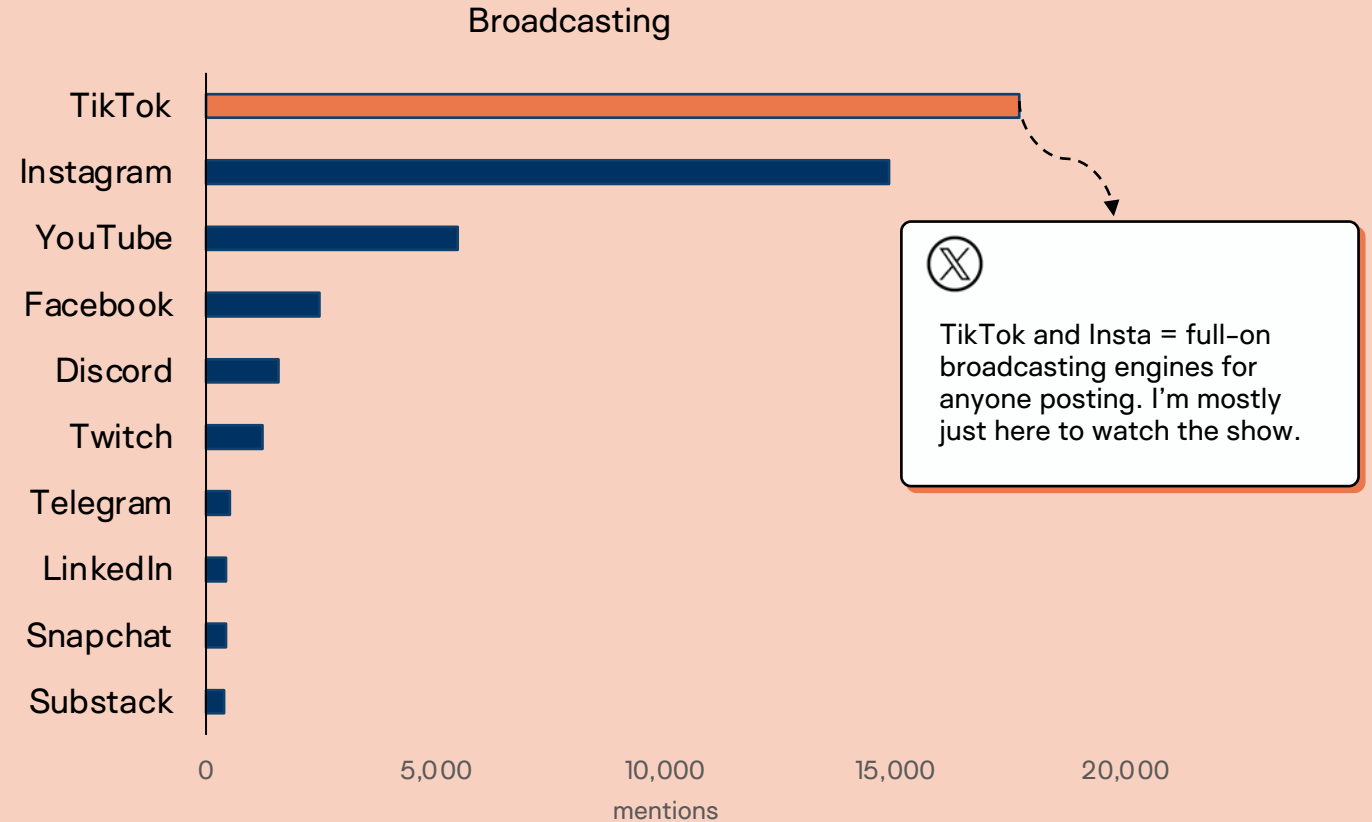
Audiences are alive to how the social landscape is changing.

Their identification of TikTok, Instagram and YouTube with one-to-many broadcasting reflects how each has increasingly centered vertical video, delivered via algorithm.

These have quickly become the default form and delivery system for content on many mainstream platforms – and reflect the broader trend of passive consumption on the part of audiences.

Of course, there are also many within these audiences who react strongly against this kind of consumption – and this provides a cause and accelerant for audience fragmentation across platforms.

Social feeds have become broadcast channels—your brand must think like a media company and create content designed to compete with Netflix and Disney, not just optimised for conversation.



Mentions of platforms in association with broadcasting in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

Which platforms are most linked to conversations around algorithms?

The algorithm of each platform has a major bearing on how audiences perceive it. Is it seen as politically skewed one way or another? Too permissive or too restrictive around certain types of content and ‘free speech’?

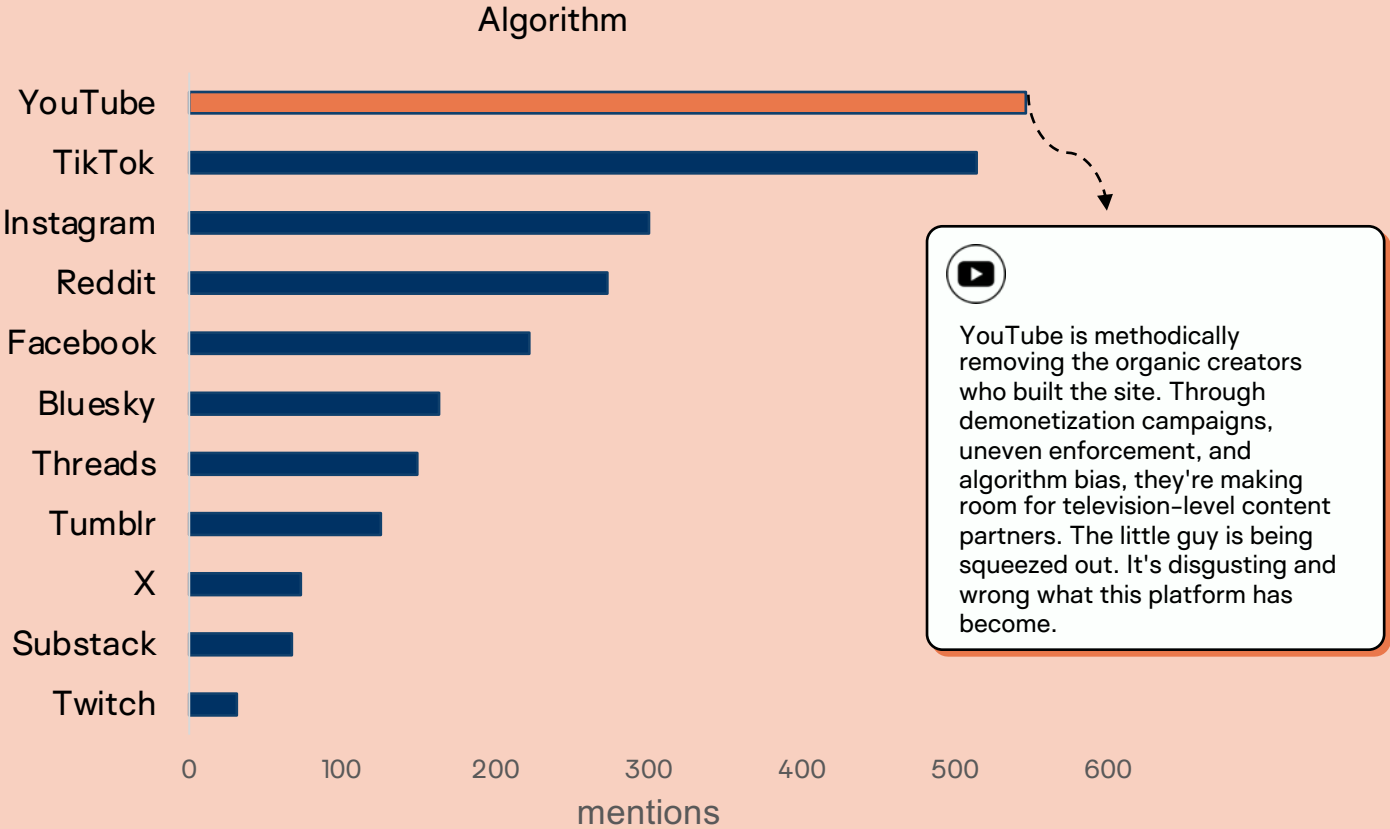
Audiences tend to talk about ‘the’ algorithm when discussing it as a malevolent or all-powerful force. But they can also talk about ‘my’ algorithm warmly, as a reflection of their individuality.

Why is YouTube the *most* mentioned in this conversation? In a word, monetization. YouTube is largely agreed to provide the best remuneration or creators.

If the YouTube algorithm moves on it can remove your viability to remain a member of the creator economy.

This all reflects a growing awareness of the role of algorithms in filtering everyday experience. And, similar to the passive consumption it facilitates, the algorithm can be a driver of audience fragmentation.

TikTok, YouTube and Instagram are now “lean-back” media environments. Brands must produce thumb-stopping, algorithm-friendly content to break through.



Mentions of platforms in association with algorithm in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

Shift 2: Platform-Hopping



Tbh, I miss when social media was just normal people I knew posting their normal lives. Now, every post is an attempt at 'content' or a desperate plea to be noticed by a brand or trying to amass a huge following.

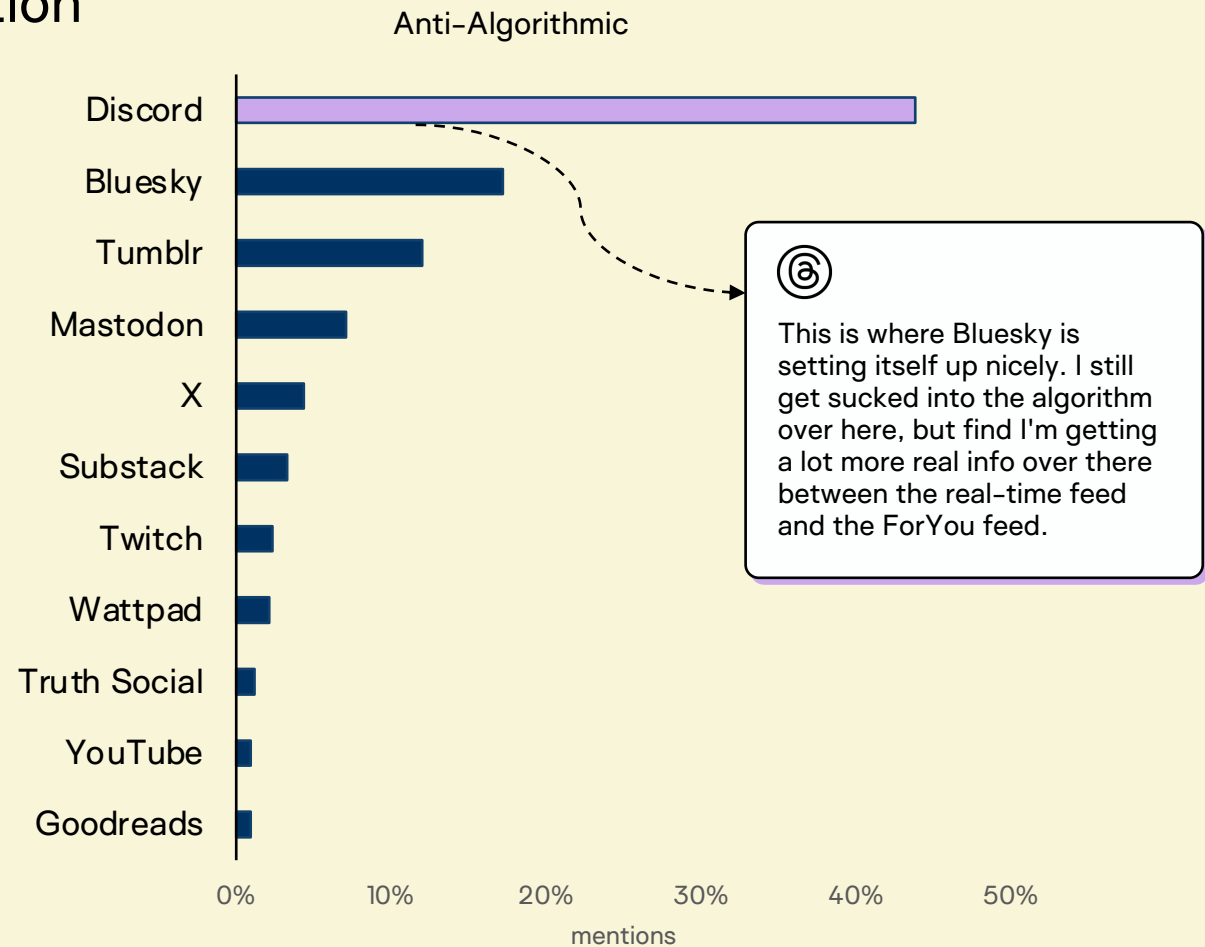
It's tedious. It's gross. It's not real.

‘Social’ can increasingly be seen as tiring, prompting a retreat to safer spaces.

Anti-algorithmic spaces are seen as escapes from over-mighty algorithms and passive consumption

A desire to better control their own experience of online spaces – from enhancing their sense of agency, to gravitating towards those of a similar political worldview – has seen users move to new social platforms.

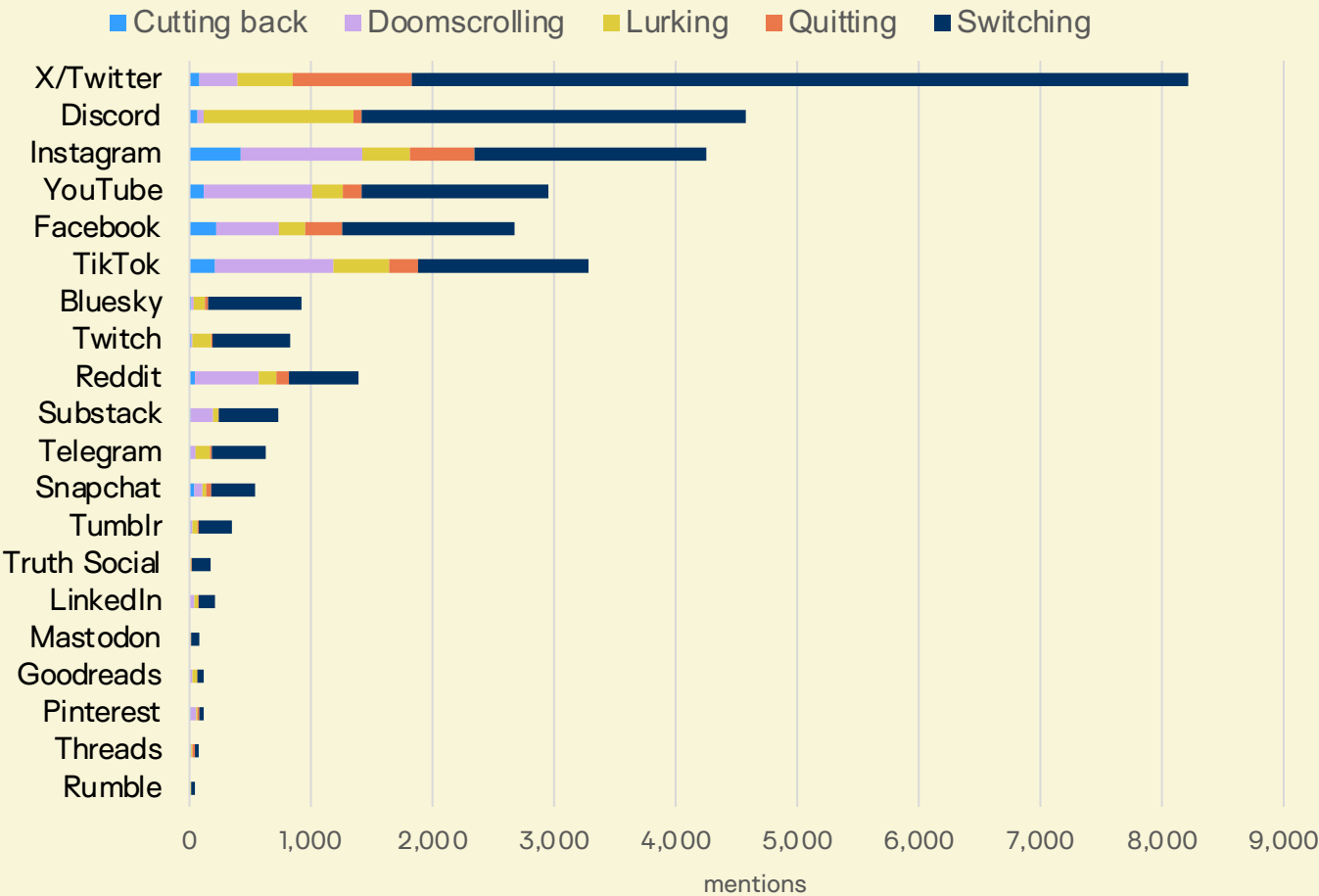
This can take several forms, with users variously flocking to platforms that are non or ‘anti’ algorithmic (i.e., Discord), platforms in which the decision of ‘which’ algorithm is used sits more squarely with the user (i.e., Bluesky, Mastodon), platforms in which the algorithm is de-emphasized and ‘weaker’ (i.e., Tumblr), and finally platforms in which the interface is Twitter-lite, but as yet still informed enough by followers and interests to feel like the ‘old’ Twitter (Substack’s social feed).



Mentions of platforms in association with anti-algorithm in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

Which platforms are linked to which behaviors and perspectives?

One important distinction lies in the nature of the 'switching' conversation. Because while Instagram and TikTok are more likely to be cited as platforms they are switching 'from', X/Twitter and Discord are often referred to as the platform users are switching 'to'.



Mentions of platforms by behavior in the Social Media conversations from August–November 2025, across X, Instagram, Facebook, TikTok, Twitch, YouTube, Threads, Pinterest, Tumblr, blogs, forums, and more.
Source: Pulsar TRAC.

Shift 3: Interest Communities Give Way to Identity Communities

“Interest or goal-based communities are seeing engagement drops of 20 to 40% over the last 5 years as users increasingly turn to AI for answers, while identity-based communities remain resilient because they do not rely on search or problem-solving utility but on shared identity and ongoing relationships.”

Source: FeverBee, “Engagement is declining in many hosted communities. Should we be worried?”

Niche and interest-based communities absorb users

Discord leads the way on niche and fandom culture. Its closed nature allowing individuals to express their interests, fandom and peccadillos in spaces are seen as safer or more curated to their taste.

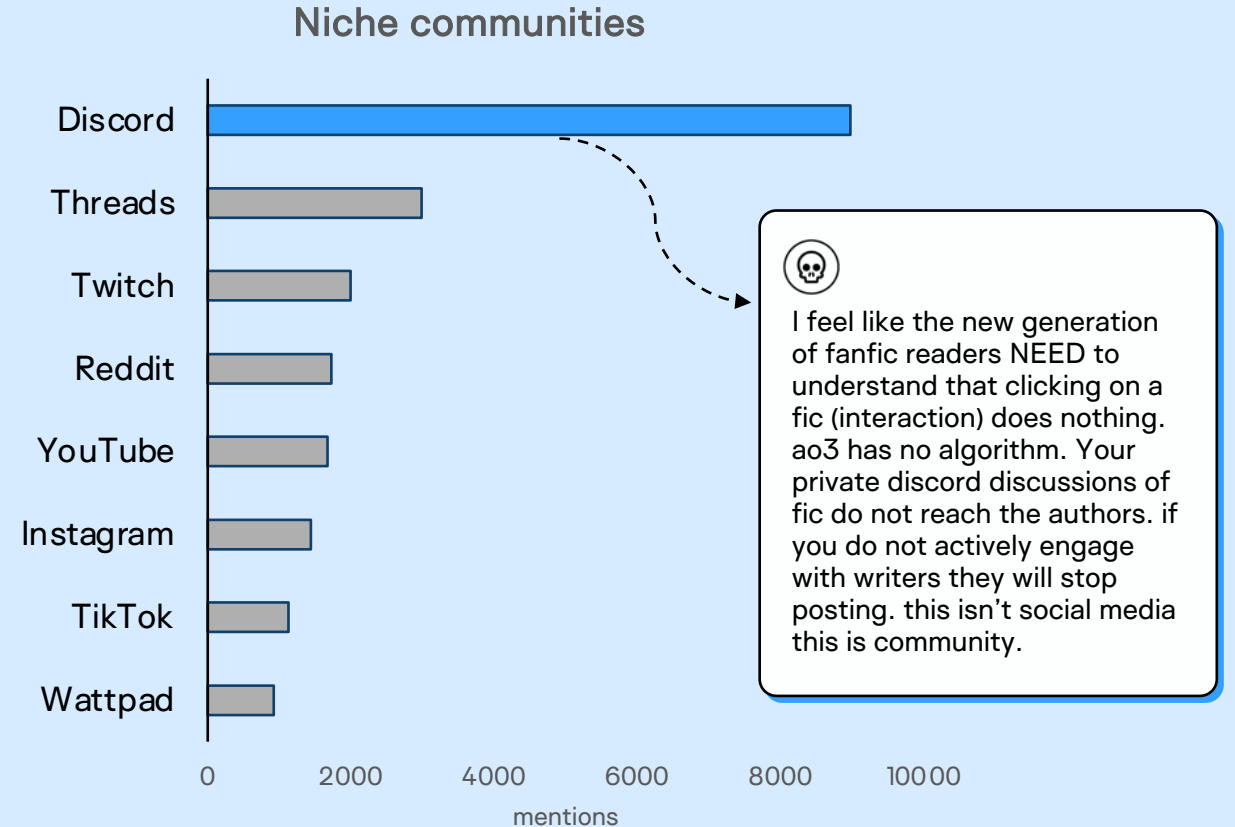
Somewhat surprisingly, Threads comes in second – some way ahead of Reddit. Does this mean Threads is ultimately seen as being more niche than Reddit?

Of course not, but it reflects two things. First, that Reddit's increasing size and mainstream role (not least as a source for LLM training data) means that users are less likely to talk it up as a home for niche audiences.

Secondly, it speaks to the appeal of Threads. Originally viewed as the more 'corporate' of the new wave of social – in large part due to its leveraging of the Instagram social graph for its initial user base, users now value the fact that it appears a 'safer' and calmer platform than others – one that serves as a bridge between mainstream and subcultural elements.

For both Discord and Threads, the feeling of safety is important to niche communities.

Influence is shifting into niche, trust-rich micro-communities—brand advocacy now requires engaging in (or enabling) these tight-knit clusters.



Mentions of platforms in association with niche interest in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

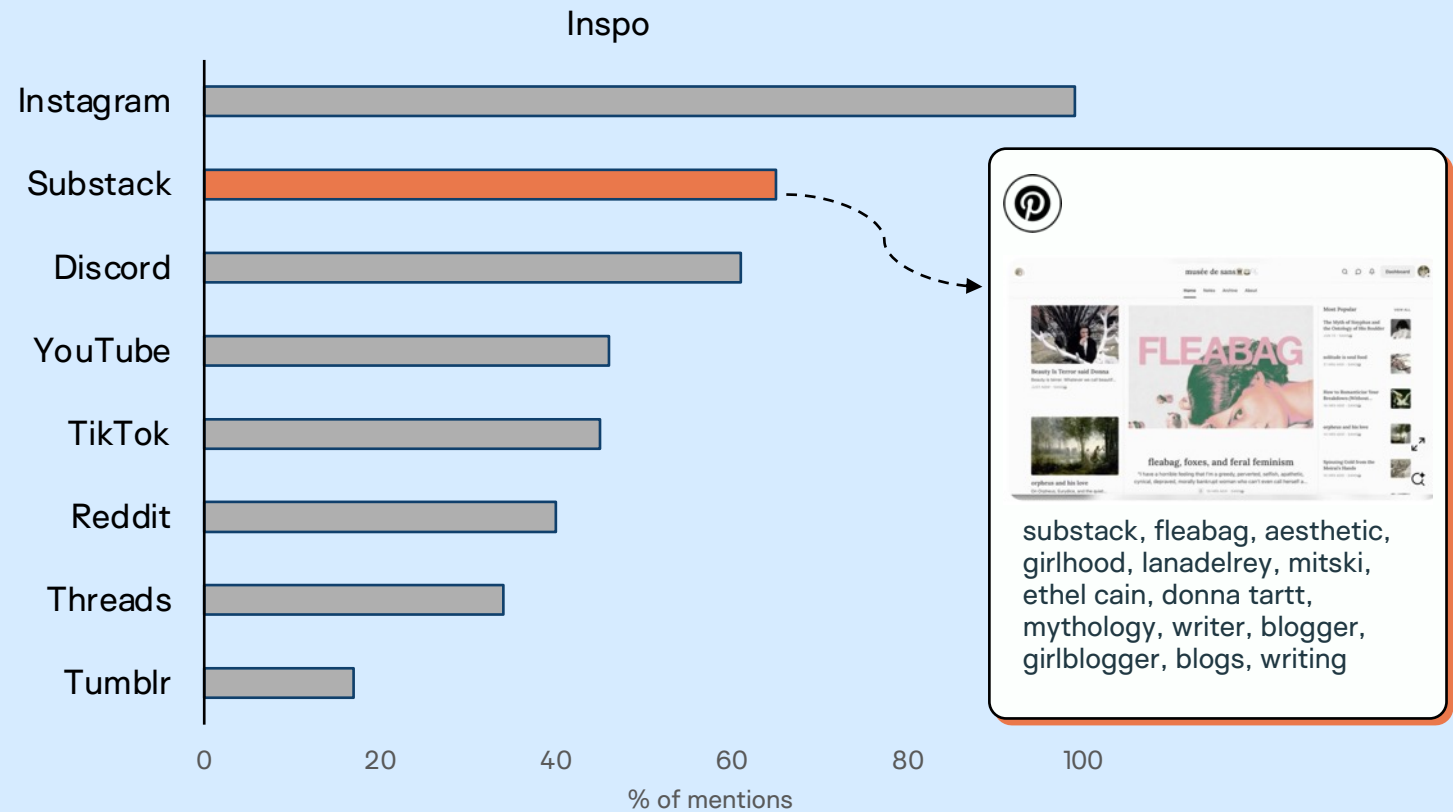
Which platforms are seen as hosting inspiration?

When it comes to inspiration, visual and fandom-driven platforms like Instagram, Discord, and TikTok rank highly.

Perhaps more surprisingly, Substack appears in second place. This is in large part because the platform is a repository for philosophies, analysis and fictions that don't have another obvious home online – all delivered to audiences with strong affinities for the writers in question, who are thus more likely to laud them publicly as some form of 'inspirational'.

But among the essays and longreads, Substack also has a more visual aspect, with fashion, food and lifestyle writers designing digital lookbooks and recreating something of the digital magazine, only significantly more democratized and decentralized.

Gen Z prefers intimate, identity-based spaces. Brands must earn permission to participate and design community-first strategies, not public-feed campaigns.



Mentions of platforms in association with inspiration in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

Which platforms are linked to ideas of ‘authenticity’?

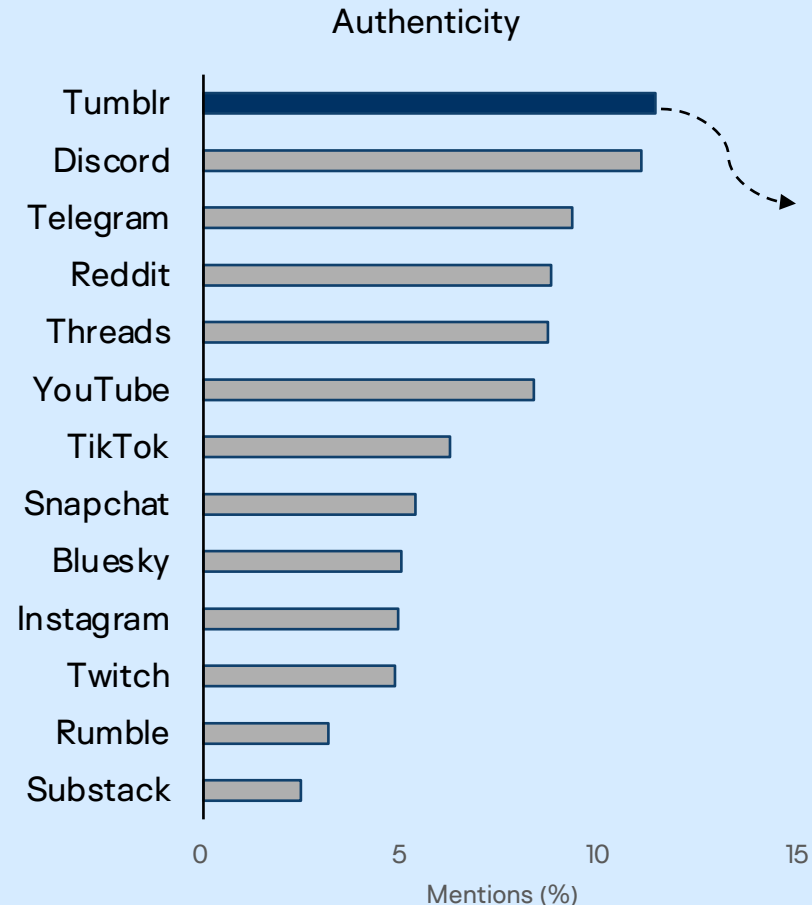
Audiences are more likely to give the ‘authentic’ label to platforms and spaces that feel lived-in, messy, and resistant to polish.

Tumblr, Discord, and Reddit embody this—chaotic, anonymous, niche-driven, and relying on human interaction and shared interest, rather than algorithmic incentives, to keep people coming back.

Discord and Telegram embody the importance of ‘dark social’, especially for younger generations, as spaces that have not yet been monetized or subjected to incentives.

Threads, meanwhile, benefits from being seen as less transactional than other major social platforms. After the initial buzz, it appears to have been quietly adopted by millions as a vestige of a slightly older, calmer internet.

Both Threads and Tumblr, however, are more vulnerable to inauthenticity than closed ‘dark social’ spaces, and as such users often guard these spaces jealously, both against interlopers (‘astroturfers’ and ‘sock puppets’) and against changes emanating from the platforms themselves.



What I love about this site is the fact it's the closest I've gotten to pre-2000 internet in years. No one knows anyone's real name, photos are entirely optional, and we're pretty sure at least one of our mutuals is 100% lying about everything. There's a reason it's one of the only social media sites I keep coming back to. It somehow manages to be just as horrible, enjoyable, and chaotic as 1990s chat rooms used to be [...]

Mentions of platforms in association with authenticity in the Social Media conversation between Aug–Nov 2025 across X, Facebook, YouTube, Instagram, Pinterest, Threads, Twitch, the Dark Web, Tumblr, blogs, forums and more. Source: Pulsar TRAC

What The Great Fragmentation Means for Marketers

The 5 Marketing Shifts to Thrive on
the Splintered Web

Shift 1

Cultural targeting replaces interest & demographic targeting

Because platforms are now identity-coded, messaging must be built around micro-identities, not broad demos. This means:

- ✦ One message no longer works across platforms
- ✦ Cultural nuance becomes a prerequisite
- ✦ Positioning must resonate with the identity-logic of each platform ecosystem
- ✦ Marketing becomes cultural intelligence.

Shift 2

Narratives become the unit of strategy

Perceptions and behaviors take shape across multiple contexts. The only threads transcending the platforms and connecting perceptions and behaviors across audiences are the narratives. Acting on an audience today means acting on the narratives.

- ◆ Narrative detection and clustering become core operational needs
- ◆ Which narratives are shaping your brand perception?
- ◆ Risk and opportunity emerge between platforms, not within one
- ◆ How are the narratives mutating across ecosystems?

Shift 3

Platforms become message constraints

Because each platform now has its own identity "vibe," the platform itself constrains what kind of message works there. For example:

- ◆ TikTok requires cultural participation, not advertising
- ◆ Reddit requires proof, not performance
- ◆ Discord requires contribution, not broadcast
- ◆ X requires hot takes and ideological alignment
- ◆ Bluesky requires authenticity + decentralization

Brand narratives must be fluid and multi-contextual.

Shift 4

Creative must become multi-format by default

The format fragmentation (video, audio, livestream, essays, snippets, slides, memes) forces creative teams to produce:

- ◆ Multi-length assets
- ◆ Multi-tone variations
- ◆ Multi-format executions
- ◆ Modular creative templates
- ◆ Adaptive identity-based assets

This requires new workflows, leveraging automation and AI-assisted creative pipelines.

Shift 5

ROI measurement must shift from channel metrics to narrative metrics

Marketers must assess:

- ◆ Share of narrative: brand's share of narratives driving positive vs negative outcomes
- ◆ Narrative momentum: share, velocity & relative size
- ◆ Narrative origin, evolution and future trajectory
- ◆ Narrative audience: which communities are pushing which narrative
- ◆ Narrative lift: behavioral change associated with narrative adoption (click-through, sign-ups, voting intent, stock moves)

"Impressions" and "engagement" are relics of the pre-fragmentation era. The new currency is narrative momentum across ecosystems.

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