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# Q2 2025 Pulse Survey Analysis



## Platform usage

*Facebook, YouTube and Instagram are still the core social platforms audiences use worldwide (with WhatsApp dominating in the UK). Gen Z and Millennials are much more likely to have a presence on Snapchat and Reddit. Among newer platforms, Threads has become the stickiest across age groups. And while overall Bluesky's adoption is small, it's interesting to note that Gen Z is the least likely generation to be there.*

| Top Platforms - Global |
|---|
| 1. Facebook - 81%<br>2. YouTube - 71%<br>3. Instagram - 66%<br>4. WhatsApp - 53%<br>5. TikTok - 52%<br>6. Snapchat - 39%<br>7. X - 38%<br>8. LinkedIn - 33%<br>9. Pinterest - 31%<br>10. Reddit - 22%<br>11. Threads - 14%<br>12. Bluesky - 5%<br>13. Mastodon - 1% |

*Platforms by Region*

| US | UK | AUS |
|---|---|---|
| 1. Facebook - 83%<br>2. YouTube - 75% | 1. WhatsApp - 81%<br>2. Facebook - 78% | 1. Facebook - 82%<br>2. Instagram - 69% |

| | | |
|---|---|---|
| 3. Instagram - 62%<br>4. TikTok - 49%<br>5. X - 37%<br>6. Snapchat, Pinterest - 33%<br>7. LinkedIn - 31%<br>8. WhatsApp- 27%<br>9. Reddit - 25%<br>10. Threads - 14%<br>11. Bluesky - 7%<br>12. Mastodon - 2% | 3. Instagram, YouTube - 69%<br>4. TikTok - 55%<br>5. X, Snapchat - 42%<br>6. LinkedIn - 35%<br>7. Pinterest - 30%<br>8. Reddit - 19%<br>9. Threads - 14%<br>10. Bluesky - 4%<br>11. Mastodon - 1% | 3. YouTube - 67%<br>4. TikTok - 52%<br>5. Snapchat, WhatsApp - 47%<br>6. Pinterest - 32%<br>7. X - 31%<br>8. LinkedIn - 28%<br>9. Reddit - 22%<br>10. Threads - 12%<br>11. Bluesky - 2%<br>12. Mastodon - 0% |

*Platforms by Age*

| Gen Z | Millennials | Gen X | Boomers |
|---|---|---|---|
| 1. Instagram - 83%<br>2. YouTube - 80%<br>3. TikTok - 76%<br>4. Facebook - 67%<br>5. Snapchat - 66%<br>6. WhatsApp - 63%<br>7. X - 48%<br>8. Pinterest - 39%<br>9. LinkedIn, Reddit - 30%<br>10. Threads - 17%<br>11. Bluesky - 3%<br>12. Mastodon - 1% | 1. Facebook - 85%<br>2. YouTube - 80%<br>3. Instagram - 74%<br>4. WhatsApp - 60%<br>5. TikTok - 59%<br>6. Snapchat - 46%<br>7. X - 45%<br>8. LinkedIn - 38%<br>9. Pinterest - 32%<br>10. Reddit - 27%<br>11. Threads - 17%<br>12. Bluesky - 6%<br>13. Mastodon - 2% | 1. Facebook - 84%<br>2. YouTube - 68%<br>3. Instagram - 57%<br>4. WhatsApp - 47%<br>5. TikTok - 42%<br>6. LinkedIn - 33%<br>7. X - 32%<br>8. Pinterest - 26%<br>9. Snapchat - 22%<br>10. Reddit - 16%<br>11. Threads - 11%<br>12. Bluesky - 6%<br>13. Mastodon - 1% | 1. Facebook - 88%<br>2. YouTube - 47%<br>3. Instagram - 39%<br>4. WhatsApp - 38%<br>5. Pinterest - 28%<br>6. LinkedIn - 24%<br>7. X - 23%<br>8. TikTok - 21%<br>9. Snapchat - 11%<br>10. Reddit - 8%<br>11. Threads - 5%<br>12. Bluesky - 7%<br>13. Mastodon - 1% |

## Emerging platforms

*Social media users are most eager to increase their time on community-based platforms like Reddit in the near term, more so than nascent spaces like Bluesky or Mastodon. Regardless of platform type, Gen Z and Millennials are most likely to drive adoption. Male users are also more likely than female users to want to test these platforms.*

*Across demographics, users' primary motivation for trying new platforms is because they already know people using them—signaling a return back to the essence of OG social. Gen Z is slightly more likely to be swayed if influencers they like already have a presence on those platforms.*

- 51% global social media users plan to spend more time on community-driven platforms like Reddit over the next six months.
    - This rises to 63% for Gen Z and Millennials

    - 57% of male users plan to increase their time here v. 45% female.

- Over the next six months, 48% of global social media users plan to spend more time on new / emerging social platforms like Bluesky, Threads and Mastodon.
    - 60% of Gen Z and 57% of Millennials plan to increase their time on these platforms.
    - 52% of male users plan to increase their time here v. 44% female. This split makes sense knowing that some of these platforms position themselves as X-alternatives (and males continue to be the core X audience, per our [2024 Content Strategy Report](#)).

- 41% global social media users plan to spend more time on creator-driven platforms like Substack and Patreon over the next six months.
    - This rises to 52% for Gen Z and 53% for Millennials
    - 45% of male users plan to increase their time here v. 37% female.

| *Top motivating factors for trying a new social platform (Global)* |
|---|
| 1. My friends or family are using it - 41%<br>2. I'm curious about unique features or formats - 35%<br>3. I'm interested in niche communities or specific content topics - 27%<br>4. I want a break from traditional platforms like Instagram or Facebook - 26%<br>5. I follow creators or influencers who are active on it - 24%<br>6. I want to follow or interact with companies in a new way - 19%<br>7. I want to create content and grow an audience on a less saturated platform - 18% |

| *Gen Z's reasons for trying a new social platform* | *Millennials' reasons for trying a new social platform* |
|---|---|
| 1. My friends or family are using it - 36%<br>2. I'm curious about unique features or formats - 34%<br>3. I follow creators or influencers who are active on it - 32%<br>4. I'm interested in niche communities or specific content topics - 30% | 1. My friends or family are using it; I'm curious about unique features or formats - 38%<br>2. I'm interested in niche communities or specific content topics - 30%<br>3. I follow creators or influencers who are active on it - 28% |

# Search behaviors

*Most people's primary instinct when looking for information is still to turn to traditional search engines—but Gen Z is the reason why this is shifting. Social is now the #1 place they search—over Google and traditional search engines—and are the most likely generation to tap AI tools like ChatGPT or Gemini.*

- When looking for information, social users turn to
  - Google/traditional search engines - 52%
  - Social media - 24%
  - Friends and family directly - 10%
  - Chat-based AI tools - 7%

*Search preferences by age*

| *Gen Z* | *Millennials* | *Gen X* | *Boomers* |
|---|---|---|---|
| 1. Social - 41%<br>2. Google/search engines - 32%<br>3. Chat based AI - 11%<br>4. Friends/family - 9% | 1. Google - 49%<br>2. Social - 27%<br>3. Friends/family; Chat based AI - 9% | 1. Google - 63%<br>2. Social - 15%<br>3. Friends/family - 10%<br>4. Virtual assistants - 6% | 1. Google - 67%<br>2. Friends/family - 14%<br>3. Social - 7%<br>4. Virtual assistants - 6% |

- Topics social users would prefer to search on social v. traditional search engines
  - Product reviews/recommendations - 37%
  - Local restaurants, bars or things to do - 35%
  - News/trending topics; DIY tutorials and how-to content - 30%
  - Fashion or beauty inspiration - 26%
  - Fitness/wellness advice; Travel ideas and itineraries - 24%

| Top Content Consumers Rely on Social For Most (Global) |
|---|
| 1. Cooking / recipe inspiration and education - 50%<br>2. TV/movie recommendations - 43%<br>3. Music discovery - 36%<br>4. Sports news / updates - 33%<br>5. Beauty/self-care recommendations; Health/medical info; National / global news - 32%<br>6. Fashion news & research; Product discovery and research (for my personal life); Restaurant recommendations; Travel research - 28% |

| Top Content Female Users Rely on Social For Most | Top Content Male Users Rely on Social For Most |
|---|---|

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| | |
|---|---|
| 1. Cooking / recipe inspiration and education - 60%<br>2. Beauty/self-care recommendations - 46%<br>3. TV/movie recommendations - 44%<br>4. Health/medical info - 35%<br>5. Music discovery - 33%<br>6. Fashion news & research - 32% | 1. Sports news / updates - 48%<br>2. TV/movie recommendations - 43%<br>3. Cooking / recipe inspiration and education - 40%<br>4. Music discovery - 39%<br>5. National / global news - 37%<br>6. Health/medical info - 29% |

## The personal impacts of social media

*Social media's impact on our wellbeing continues to be debated—and pointed to as the basis for proposed social media age limits in certain regions. But across the board, survey respondents feel like the positive impacts of social on their mental health, financial choices and social lives far outweigh the negatives.*

*This optimism is even more pronounced in younger generations. Rather than perceive social as a time suck, a magnet for impulse purchases or a solo activity, Gen Z and Millennials are curating their feeds to become a welcome reprieve from troubling news / events and mining platforms for much needed financial education (FinTok) and community bonding that is additive to their in-person social circles.*

- 60% of all social users say social media has had a net positive impact on their **mental health** over the last six months, v. 18% who say it's had a negative impact
  - Surprisingly, younger generations are more likely to say social media has had a positive impact on their mental health - 71% Gen Z and 68% Millennials

- 47% of all social users say social media has had a net positive impact on their **financial decisions** over the last six months, v. 13% who say it's had a negative impact
  - Younger generations are more likely to say social media has had a positive impact on their financial decisions - 62% Gen Z and 53% Millennials

- 53% of all social users say social media has had a net positive impact on their **social lives** over the last six months, v. 14% who say it's had a negative impact. 33% say it's had no impact at all.
  - Younger generations are more likely to say social media has had a positive impact on their social lives - 64% Gen Z and 61% Millennials

# Defining social for the bold

*Tired: Brands being unhinged on social. Wired: Brands being honest! Reinforcing our 2025 Index findings, the boldest thing a company can do on social is be upfront about their products, services and what they stand for. So it's unsurprising that the #1 thing audiences would call out brands for is being unethical—more so than their pricing or the stances they take on public issues.*

*Doubling down on our Index and Content Benchmarks research, respondents confirmed that the top two actions brands need to prioritize on social are audience interactions and original content. Younger generations specifically seem to want more brands setting viral trends rather than repurposing them after the fact.*

- Top traits social users associate with "bold" brands
    - Honest - 50%
    - Inspirational - 40%
    - Viral or trendy - 35%
    - Humorous - 34%
    - Provocative - 24%
    - Unfiltered/unhinged; Pioneering - 23%
    - Brand universe creation - 15%
    - Absurd - 10%

| Top traits Gen Z associates with "bold" brands | Top traits Millennials associate with "bold" brands | Top traits Gen X associates with "bold" brands |
|---|---|---|
| 1. Honest - 49%<br>2. Viral or trendy - 42%<br>3. Inspirational - 38%<br>4. Humorous - 35%<br>5. Unfiltered / unhinged - 28% | 1. Honest - 52%<br>2. Inspirational - 43%<br>3. Viral or trendy - 37%<br>4. Humorous - 31%<br>5. Pioneering - 25% | 1. Honest - 48%<br>2. Inspirational - 40%<br>3. Humorous - 36%<br>4. Viral or trendy - 31%<br>5. Provocative - 26% |

- When a company is bold on social, social users are more likely to
    - Engage with their content - 34%
    - Follow them - 27%
    - Tell friends/family about the brand - 13%
    - Buy from that brand - 10%

- Outside of a brand's products/services, the top factors that influence how social users trust the company:

    - Reviews/ratings websites - 24%
    - Feedback from people I know - 18%
    - The brand's customer service - 16%
    - Their social media interactions - 13% (*Gen Z ranks this #2*)
    - Their social content - 10%

- Social users are most likely to call out a brand for
    - Doing something unethical - 41%
    - Failing to respond to my customer service questions - 27%
    - Posting content that shows a lack of empathy for their customers - 26%
    - Their pricing - 24%
    - Taking a stance on a public issue that I disagree with - 17%
    - Running an inauthentic influencer campaign - 16%

- Younger generations are more likely to call out brands for inauthentic influencer campaigns (19% Gen Z), while older generations are more likely to call out brands for failing to respond to customer service questions (28% Gen Z, 31% Boomers)

| What is **most** important for brands to prioritize on social (Global) |
|---|
| 1. Interacting with audiences - 58%<br>2. Posting original content series (recurring or episodic storytelling) - 57%<br>3. Interacting with other companies/brands - 32%<br>4. Interacting with influencers - 28%<br>5. Jumping on viral memes - 25% |
| *Gen Z is slightly more likely to want brands prioritizing jumping on viral memes (31%) and interacting with influencers (32%) |

- What compels social media users to watch/engage with brand content "series"
    - 48% - if they tell complete stories within each post or episode
    - 40% - if the series includes a cast of characters that you get to know throughout the series
    - 35% - Recognizing the series because other people I follow are talking about it
    - 34% - Telling a longer story over the course of multiple posts / episodes

## The attention economy is becoming the actual economy

*Social media already dominates the attention economy— but increasingly, success in the attention economy determines business growth in the real economy. No matter how you look at it, the actions brands take—or fail to—on social impact consumers' decision to buy or defect. Even in a difficult economic climate, younger generations are more likely to buy things they* *discover on social.*

- When a brand is unresponsive to customer service questions on social, 49% of social users only **sometimes** try reaching out again on traditional channels and 19% **never** will.

- 76% of all social users say social media (ads, influencer posts, brand content, etc.) has influenced some percentage of their purchases over the past six months
  - This rises to 90% for Gen Z and 84% for Millennials

- 64% of all social users say when a brand partners with an influencer they like, they're willing to buy more from that brand.
  - This rises to 76% for Gen Z and 74% for Millennials

- In the coming months, **38% of all social users are less likely** to buy something they discovered on social due to the economic climate, vs. **28% who are more likely to buy**.
  - This flips for younger generations:
    - 43% of Gen Z are **more** likely to buy, 35% less likely
    - 36% of Millennials are **more** likely to buy, 35% less likely

## Methodology

**Methodology:** This consumer survey was conducted online by Glimpse, a global market research firm, on behalf of Sprout Social. Participants included 2,280 social media users across the US, UK and Australia. The survey was conducted from April 23 to May 5, 2025.

**Demographic Highlights:**
- Country: 1,006 US, 1,016 UK, 258 AUS
- Ages
  - 584 Gen Z
  - 701 Millennial
  - 608 Gen X
  - 387 Boomers
- Gender
  - 1,169 Female
  - 1,111 Male