



ACTIVATE CONSULTING TECHNOLOGY & MEDIA OUTLOOK 2025 SOCIAL VIDEO

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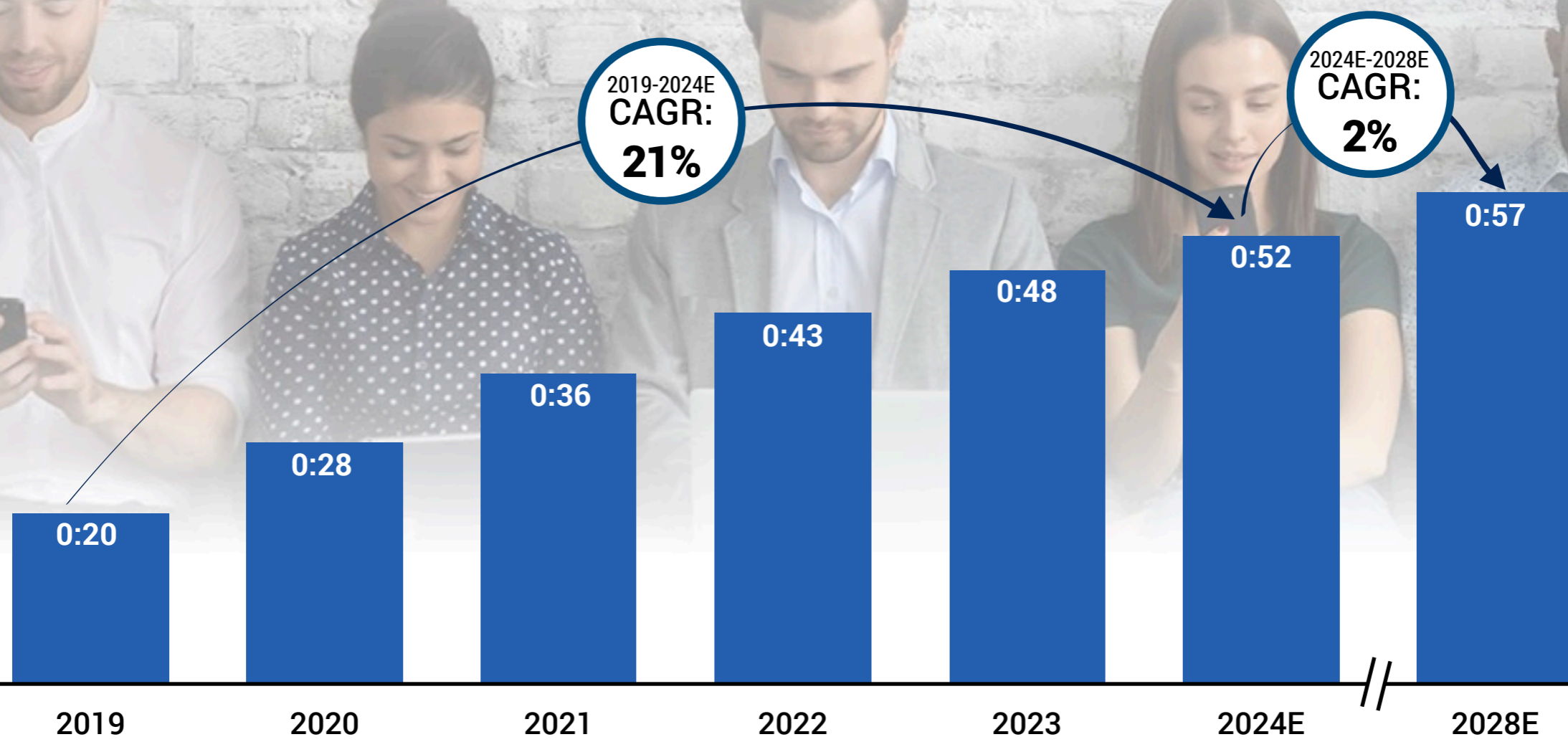


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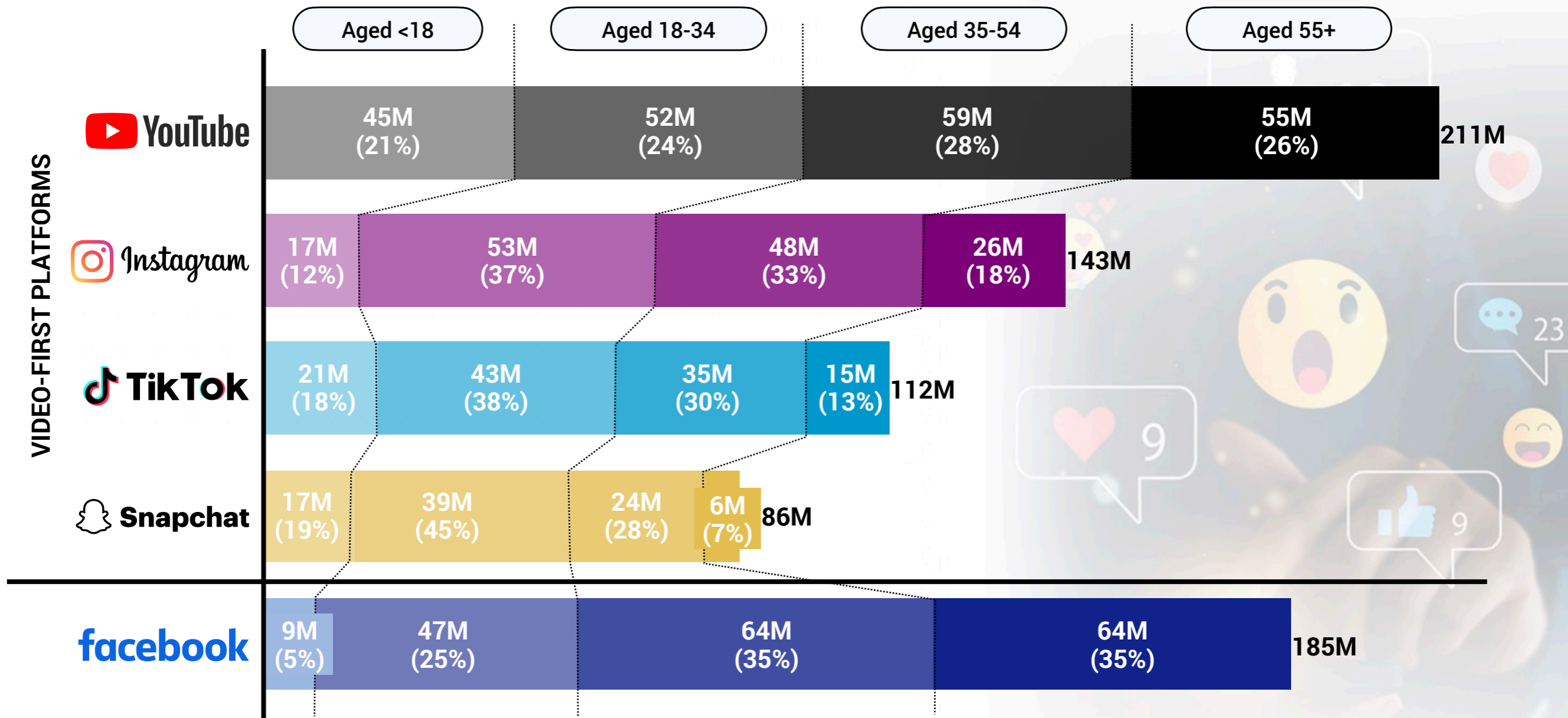
We forecast that people will continue to watch more social video over the next four years; however, growth is slowing down

AVERAGE DAILY SOCIAL VIDEO¹ TIME SPEND PER ADULT AGED 18+, U.S., 2019-2024E VS. 2028E, HOURS:MINUTES



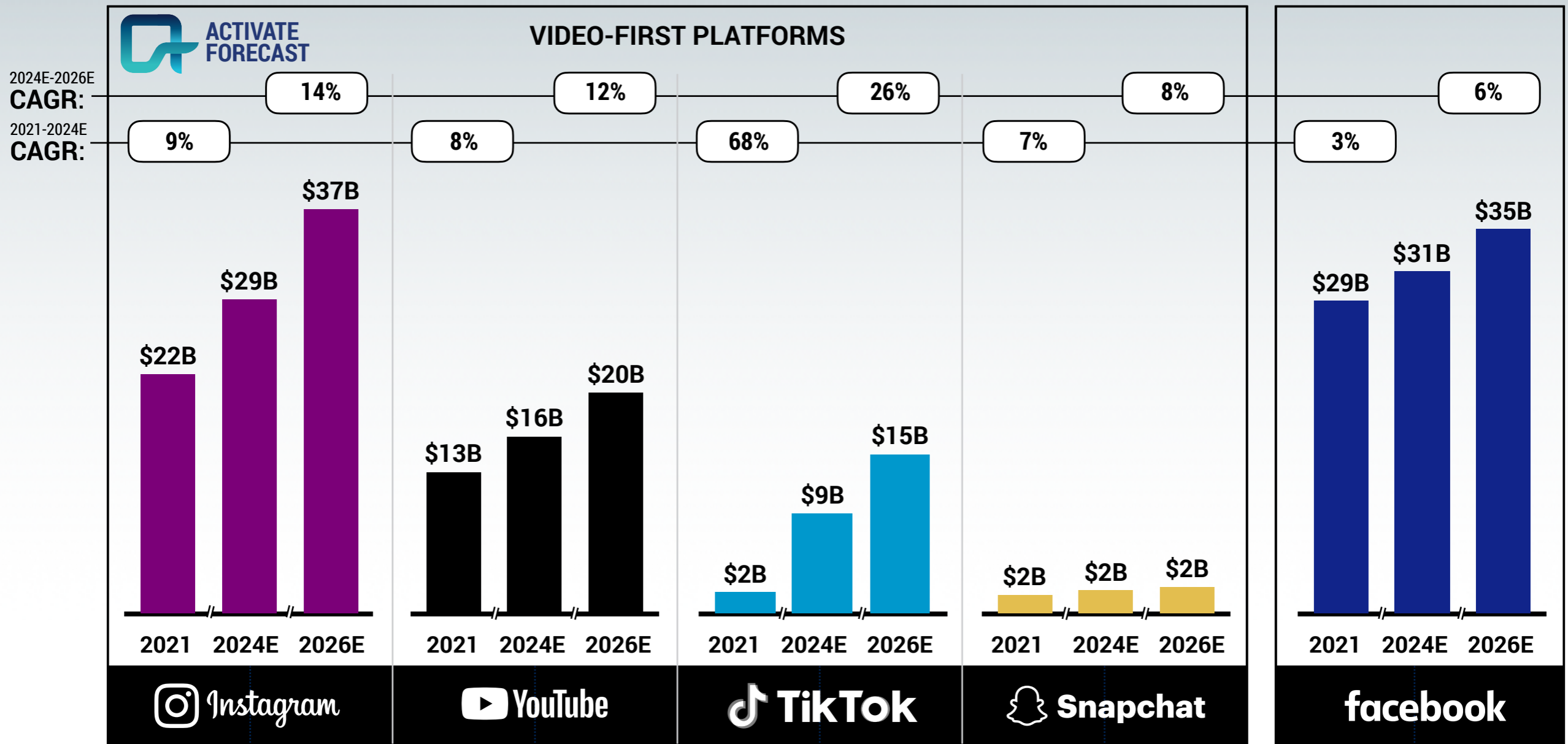
YouTube has the broadest reach, with large user bases in each age cohort

USERS OF SELECT SOCIAL VIDEO PLATFORMS BY AGE GROUP¹, U.S., 2024, MILLIONS MONTHLY USERS



We forecast that TikTok and Instagram will be the fastest growing advertising businesses

TOTAL ADVERTISING REVENUE¹ BY SOCIAL VIDEO PLATFORM, U.S., 2021 VS. 2024E VS. 2026E, BILLIONS USD



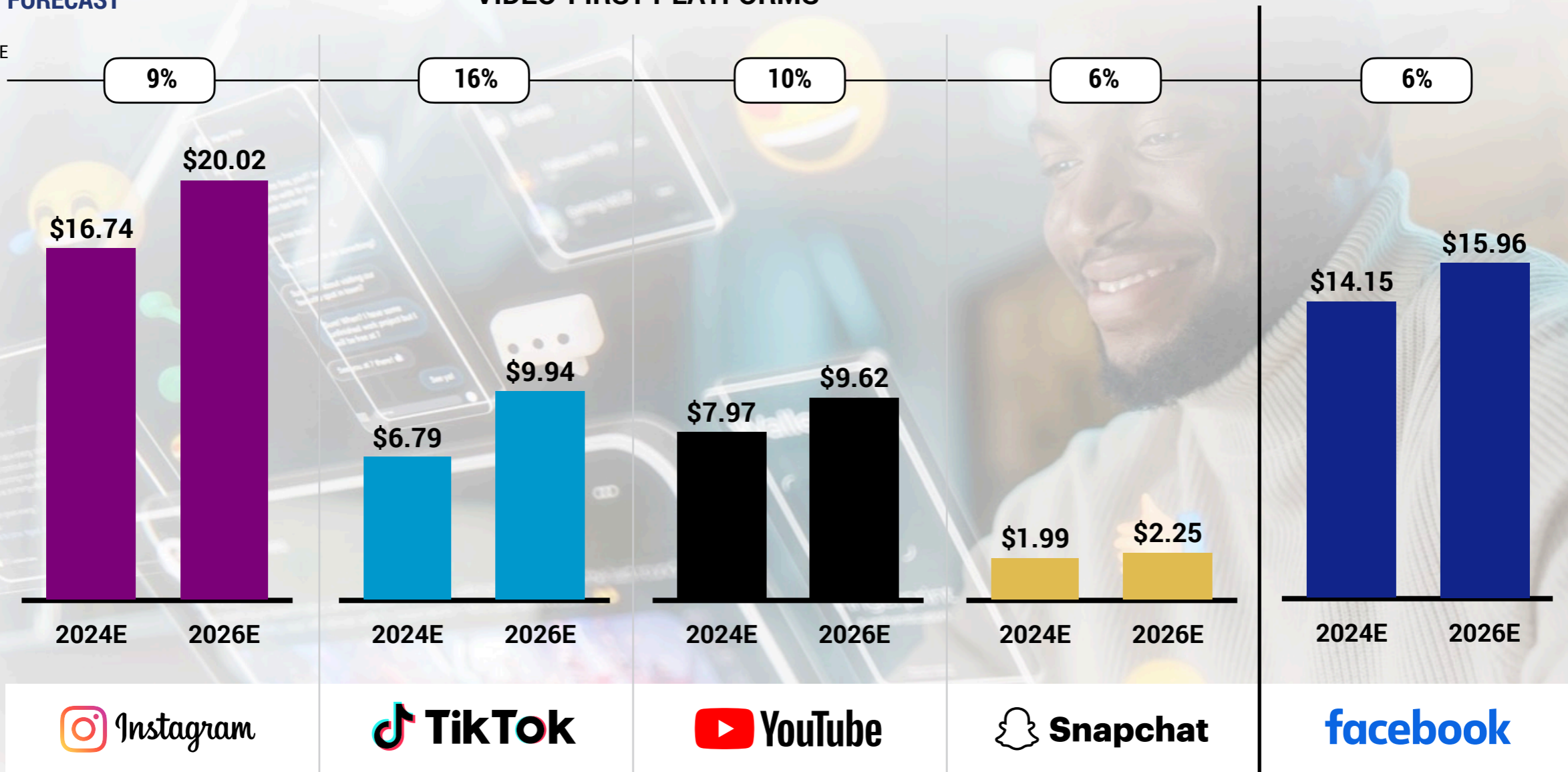
Instagram and Facebook capture the most monthly advertising revenue per user

MONTHLY ADVERTISING REVENUE¹ PER USER BY VIDEO PLATFORM, U.S., 2024E VS. 2026E, USD



2024E-2026E
CAGR:

VIDEO-FIRST PLATFORMS



1. Includes advertising revenue generated across all internet-connected devices.
Sources: Activate analysis, Activate 2024 Consumer Technology & Media Research Study (n = 4,004), Company filings, eMarketer, Statista, WARC

A diverse group of creators drives the majority of social video engagement, with limited overlap across platforms

TOP 10 TIKTOK CREATORS¹, U.S., JAN.-JULY 2024

Charli D'Amelio People & Blogs	3.7B Views	
Brooke Monk People & Blogs	3.5B Views	
Nara Smith Food & Drink	3.0B Views	
Haley Kalil ★ People & Blogs	3.0B Views	
Hot Spanish ★ Entertainment	2.9B Views	
Carlos Eduardo Espina General Interest	2.9B Views	
Alix Ashley Earle People & Blogs	2.8B Views	
Addie McCracken ★ People & Blogs	2.7B Views	
Whistle Sports	2.5B Views	
Katteyes People & Blogs	2.5B Views	

TOP 10 YOUTUBE CREATORS¹, U.S., JAN.-JULY 2024

Zack D. Films Gaming	9.0B Views	
J House Jr. Kids Entertainment & Animation	7.2B Views	
Boriskatefamily Entertainment	6.7B Views	
MrBeast Entertainment	6.3B Views	
Family Games Media People & Blogs	6.2B Views	
Alan Chikin Chow People & Blogs	5.7B Views	
Mr DegrEE People & Blogs	5.2B Views	
Chefkoudy Food & Drink	5.0B Views	
Yana Chirkina Entertainment	4.8B Views	
Stokes Twins People & Blogs	4.7B Views	

TOP 10 FACEBOOK CREATORS¹, U.S., JAN.-JULY 2024

Bailey Payne People & Blogs	2.3B Views	
Hot Spanish ★ Entertainment	1.7B Views	
Double-J Garage Film & Movies	1.4B Views	
Country Wayne People & Blogs	1.2B Views	
Showers Daycare and Preschool Film & Movies	1.1B Views	
Chicken Leg Piece Food & Drink	1.1B Views	
Frank Medrano People & Blogs	1.0B Views	
Victor Dias TV Home & DIY	1.0B Views	
Sean Bridon People & Blogs	1.0B Views	
Ray's Funny Page Entertainment	1.0B Views	

TOP 10 INSTAGRAM CREATORS², U.S., JAN.-JULY 2024

Bahjan Marg Official People & Blogs	224M Engagements	
Snoopdogg Music & Dance	218M Engagements	
Brittany Paige People & Blogs	193M Engagements	
Diljit Dosanjh Music & Dance	193M Engagements	
Haley Kalil ★ People & Blogs	192M Engagements	
Addie McCracken ★ People & Blogs	155M Engagements	
Jordan Howlett Entertainment	129M Engagements	
Kirkiimad Entertainment	123M Engagements	
Bryce Wagner People & Blogs	118M Engagements	
Will Smith People & Blogs	115M Engagements	

★ Top Creator Across Multiple Platforms

○ ACTIVATE 2025 DATA PARTNERS ○

◀▶ Nielsen

Luminate

▶ tubular

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As the leading management consulting firm for these industries, we know what success looks like because we've helped our clients achieve it in the key areas that will impact their top and bottom lines.

Together, we can help you grow faster than the market and smarter than the competition.

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Activate Technology & Media 
Outlook 2025

Thank you!

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