

# What to know about the convergence of social media platforms

## Article

Last week, Twitter finally announced a [“share” button for its Android app](#). The feature’s already standard in iOS, making Twitter really, really late to its own game. It’s just the latest example of a social media platform chasing revenues from competitors.

**The TikTokification of Instagram:** It’s been two years since Instagram decided to get Reels. (Not [BeReal](#), which is something else entirely that Instagram is also mimicking.)

Instagram's Reels feature is uncannily similar to TikTok. The head of business marketing for Instagram Shopping [told us in June](#) the platform was “really focused on Reels, commerce, and creators.”

But Instagram is now sunseting its Shopping page and Shop tab, as it refocuses its commerce efforts around integrating shopping into its main experience, rather than a dedicated shopping destination. Shopping is a major driver of engagement, which Instagram needs in order to build its Reels business. Because even though Instagram will have around \$30 billion in ad revenues this year compared to TikTok's nearly \$6 billion, the Meta-owned app will see just 16.3% growth compared to its ByteDance-owned rival's staggering 184.4%.

Reels was introduced as a defensive play for TikTok's success and to fend off a rising star.

**The YouTubeification of TikTok:** What TikTok is doing is working. This year, time spent with TikTok [will surpass](#) that of YouTube by a narrow margin. But that margin (it's about 12 seconds) is key. YouTube still has more than twice as many users as TikTok and \$2 billion more in ad revenues.

TikTok announced in February that it would introduce 10-minute videos, akin to what you might watch on YouTube. And while the app won't see user figures near what YouTube has, our forecasts predict TikTok will overtake YouTube in US ad revenues in 2024.

**The TikTokification of YouTube:** TikTok's growth in time spent means endless scrolling on the app isn't just a result of being stuck inside during the pandemic. Time spent is still growing, even as people venture back into public.

In a bid to compete with TikTok, YouTube debuted its own space for endless short-video scrolling, Shorts, in the US in early 2021.

Have Shorts succeeded? Supposedly, yes. It rolled out worldwide, and [according to YouTube](#) has more than 1.5 billion logged-in monthly users globally. But YouTube missed earnings expectations in both **Q1 and Q2**. That's not the end of the world by 2022 standards, but it does mean creating a TikTok competitor isn't enough for a rosy outlook.

**And then there's Twitter:** The app is losing US users and has already been eclipsed by TikTok in ad revenues.

Twitter tried to adopt an Instagram-, Snapchat-, and now TikTok-like Stories feature in the form of [Fleets](#) in 2020, which fizzled out a year later. Beyond that, Twitter isn't really

mimicking other platform except as it plays catchup in the commerce space. But it's also not as direct a compete as Instagram and Snapchat are.

**Why we care:** Social media platforms are converging, then diverging a bit, then converging again. The question is if Meta and Alphabet can remain on top or if TikTok will change everything. It has already changed the industry.

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