Executive Summary

*"We are heading to a kind of "unbundling phase" [on social media] and it's where I think things like Mastodon and the sort of decentralized social media stuff is really interesting. We are heading back to protocols being really interesting, and exciting, **and the future of social is lots of places and not one place. And I think that's probably a good thing."***

- **David Pierce, Editor-at-Large, The Verge**

"In under five years, we went from having every single one of our guys banned from the big tech platforms to the richest man in the world noticing, naming, and waging total war on our largest enemy [ADL] while running one of those platforms. Let that sink in. Keep the faith. We are winning."

- Andrew Torba, CEO of Alt-Right Social Network Gab, *referring to Elon Musk and the ADL*

We have been covering the **#TwitterMigration** (now known as the **"X/Twitter Migration"**) every quarter since Elon Musk took over Twitter in October 2022.

The following are links to our earlier reports:

- [4Q 2022](#)
- [1Q 2023](#)
- [2Q 2023](#)

Executive Summary

Since last quarter's report, historic shifts have occurred - perhaps as dramatic as any we have seen since Musk's initial takeover and purchase of Twitter almost a year ago.

- **The Three Migrations Continue**
  We continued to see the three main migration patterns we identified in the last report all make important turns this quarter: a **user migration** away from X continued caused by a number of ongoing issues inside the X platform, a **developer migration**, and undergirding that, a **technology migration** towards open protocols, most dramatically from Meta committing - but not yet implementing - open social protocols on their new platform Threads.

- **RIP Twitter, Hello Brand "X"**
  One of the most dramatic and abrupt shifts to date in Twitter's turbulent path since the Musk takeover was actually ceasing to be "Twitter."

Over one [weekend in July](#), Elon Musk posted that Twitter would entirely sunset the brand "Twitter" and end iconic terms like "Tweets," replacing this globally-recognized brand with the single letter "X," [a brand he had a long history with.](#)

This abrupt switch triggered changes we are only beginning to see. Its impact on current users of the platform seems mixed, but **the negative impact on new user downloads of the X (formerly Twitter) applications appears to be stark.** Third-party estimates of app downloads indicate an ongoing deep impact on that crucial source of new users.

- **X Turbulence:** In addition to the brand shake-up, there were many other tumultuous issues inside X over the last three months. These include content moderation issues, revenue sharing to questionable accounts, advertising continuing to be down, dramatic rate limiting of all users for a period of time, and threatened lawsuits.

- The chaotic quarter ended with Elon mentioning in a livestream that he was planning to move all of X behind a paywall and go to a monthly subscription model for all X users — a confusing statement that X CEO Linda Yaccarino later did not deny nor confirm.

- **X Traffic Metrics:** Musk and Yaccarino's few specific statements on X traffic metrics indicate a continued migration of users away from the platform since the takeover. We go into detail on the direct and indirect numbers for the X platform and estimates from all sources below, but **all available metrics indicate that X's downward traffic arc continued this quarter**, just as it has throughout most of the previous quarters since the Musk takeover.

- **Instagram Threads Meteoric Launch of a "Minimum Viable Product" - Followed by a Race to Keep and Build User Engagement:**

  In early July, Meta launched the long-awaited Instagram Threads — a direct competitor to X, and the first major new social media network to launch in the post-Twitter era. It launched claiming to be "a more positive, friendly place" and a "sanely run" alternative.

  Media Matters for America researchers questioned the new platforms' inadequate content moderation policies and practices in place, which they note led to a number of right-wing figures and extremists joining the platform and quickly testing moderation policies by posting slurs and other forms of hate speech.

  Meta's launch of Threads was shifted forward by weeks to take advantage of particularly opportune timing after a weekend of chaos for X/Twitter, during which X/Twitter suddenly implemented drastic limits on tweet views — limiting non-premium users to 600 tweets per day — and put all tweets behind a login screen, purportedly to reduce scraping of its service.

  The launch of Threads was the most successful software launch in history, with over 100 million new user signups over the first five days after launch — but because it was an early launch of a "minimum viable product," many features

were still missing and slowly added over the subsequent months. Due in large part to the missing features, the initial burst of engagement and user signups on Threads rapidly subsided.

But new estimates show that even with the decline in engagement, Threads — after only **three months — has 42.2% of the US monthly active users that the X platform does.**

- **Threads, Mastodon, and Bluesky are the prime beneficiaries of the ongoing migration of users away from X.** While the situation remains fluid and users are shopping, we see continued signs that Threads, Mastodon, and Bluesky all saw additional waves of traffic - with Post seeing modest growth as well. But other alternative platforms either roughly maintained their previous status quo or lost mindshare and users.

Twitter Chaos This Quarter, Quantified

A Sudden and Dramatic Rebranding

One weekend in July, suddenly and with little advance warning, Twitter quickly rebranded itself to X, using a logo submitted by a user responding to Musk's tweet announcing the rebrand and asking for images. Despite trademark and other issues, the corporate rebranding process moved quickly, and piece by piece, the platform began removing the Twitter branding, including the Twitter bird logo and terms such as "tweets." This brand transition is not complete yet, but the old Twitter branding is increasingly hard to find on the site or the mobile app. Musk announced the brand change on June 22nd and the changes in branding were live on the App Store on June 31st. Twitter.com links in the site were replaced by X.com links.

The purported goal of Musk and Yaccarino was to turn Twitter into an "everything app," to eventually include social media, instant messaging, digital payments, job recruiting, gaming, and more.

A rapid, global rebrand is almost unheard-of for companies of this scale in the technology sector. Facebook remained Facebook even as its parent company was renamed Meta, and Google remained Google even as its parent company was renamed Alphabet. This is because a social platform's brand is one of its most valuable elements; as noted by Bloomberg News, **"Musk's move wiped out anywhere between $4 billion and $20 billion in value, according to analysts and brand agencies.** […] 'It took 15-plus years to earn that much equity worldwide, so losing Twitter as a brand name is a significant financial hit,' said Steve Susi, director of brand communication at Siegel & Gale."

Researchers such as [Mike Proulx of Forrester](#) commented on the rebrand: "This is far from a position of strength from which to attempt what is essentially an app relaunch — a move that will only alienate more users and more advertisers. While Musk's vision is to turn 'X' into an 'everything app,' this takes time, money, and people — three things that the company no longer has. […] **Simply put, X's runway is coming to an end.**"

## The New X Branding and Traffic Impact

Several researchers noticed the immediate negative impact of the X rebrand on App Store downloads.

Initial research such as [this](#) post by Eric Seufert of Mobile Dev Memo found a dramatic decrease in X's position on the Top Downloaded charts across both iOS and Android in the wake of the rebrand.
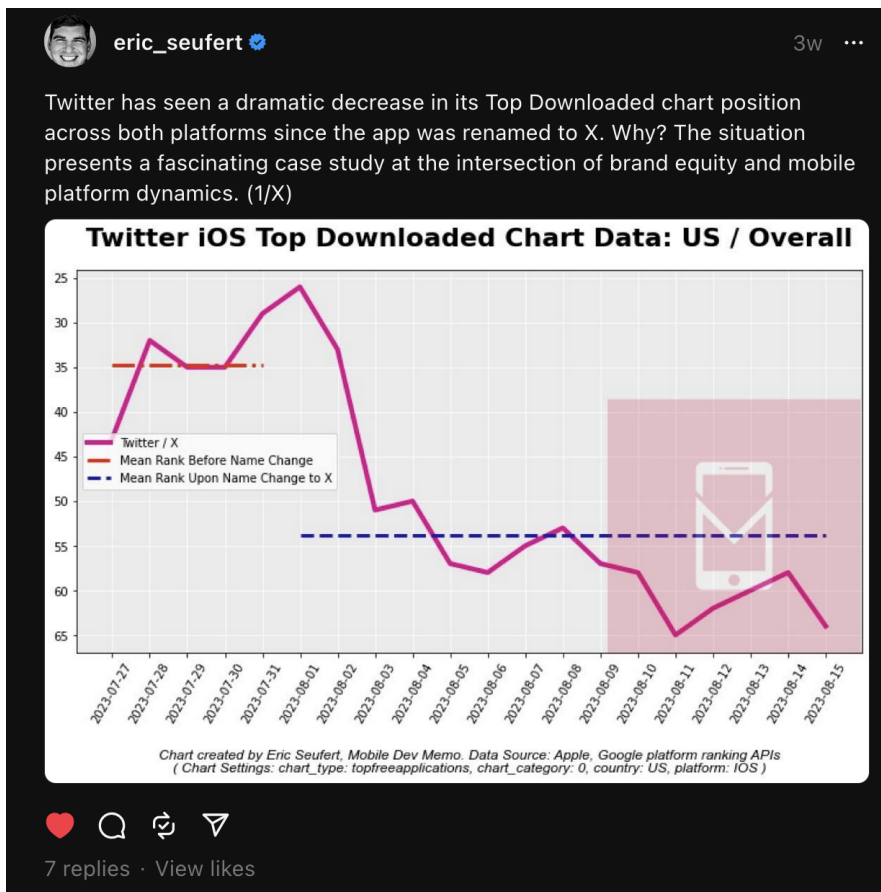
Other researchers found similar results in the wake of the rebrand:

- Mobile analytics firm Sensor Tower found a 4% drop in weekly active users and a four-spot drop in their category rankings.

- Analytics firm Apptopia found a 30% decrease in downloads in September — X's "lowest point in a decade" — across multiple major markets, including the US, UK, and Japan, as well as a 1.5% decrease in daily and monthly users and an 18% drop in app downloads compared to the previous year prior to Musk's takeover.

- Analytics firm Appfigures found a 50% drop in downloads from June 2023 (before the rebrand) to August 2023, especially from Google Play — and substantial increases in download numbers for Bluesky and popular Mastodon apps.

Downloads Dropped by 50%
Twitter → X · Est. Downloads from the App Store and Google Play
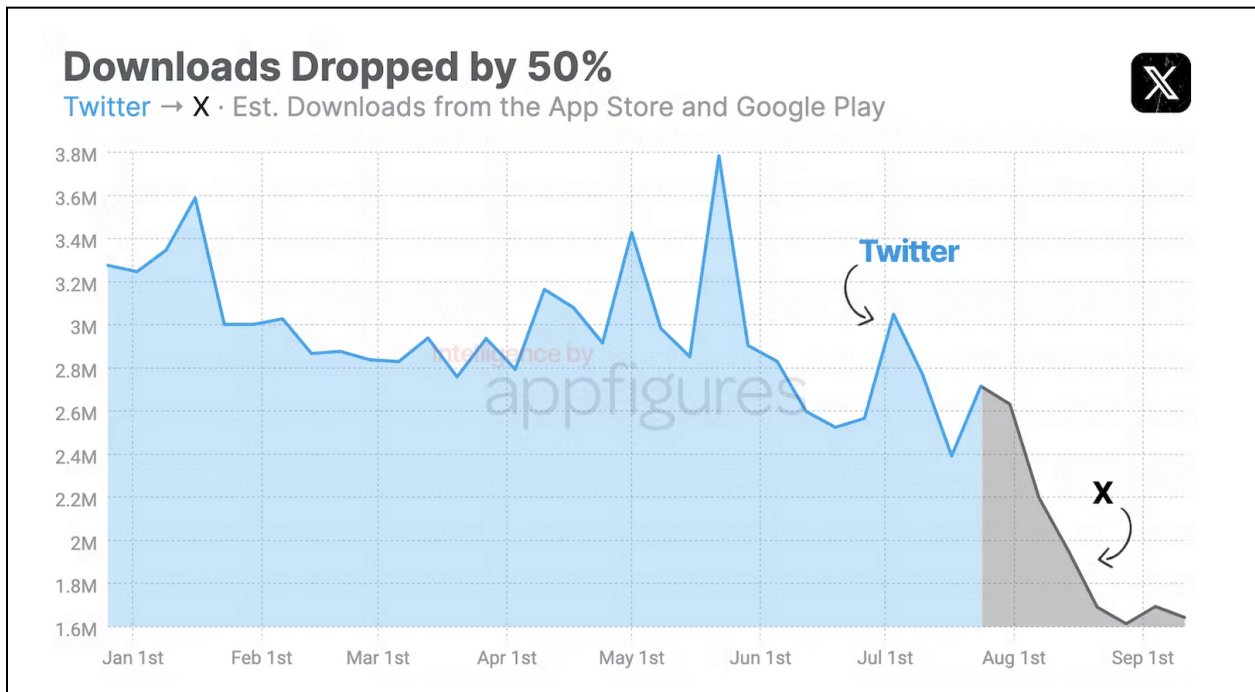
As hard as the company has tried to push the X branding, many users continue to resist adopting the name as seen in a September 15 Harris poll that found **69% of U.S. X users still refer to the platform as Twitter and to posts as 'tweets.'"**

Official Numbers from X are Few and Unclear

In September in a live stream on X, Elon Musk claimed that X has "550 million monthly users."

Later in September, at the Code Conference, Linda Yaccarino referenced that X now saw "something like" 200 to 250 million monthly daily active users. Elsewhere at the event, she references examples like "540 million monthly active users" but as reporters at the Verge noted, she did so "without quite committing to them being real figures."

X CEO Linda Yaccarino had a car-crash interview at Code Conference where she seemed undermined by Elon Musk and couldn't state precise user numbers or whether users will pay

Kai Xiang Teo, Hasan Chowdhury, and Shona Ghosh
Sep 28, 2023, 8:17 AM EDT

After the conference, according to the Information, "X clarified that it had 245 Million Daily Active Users." Mashable notes: given this number, X has lost "around 3.7 % of daily active users from before Musk's acquisition."

If Yaccarino meant that the September numbers were literally "monthly active users" and not the larger metric that Twitter used in reporting prior to the Musk purchase ("**monetizable** monthly active users") then the drop in active users is likely greater than 3.7 percent.

Either case would be in sync with Insider Intelligence's past predictions on X's trajectory of a worldwide drop of "nearly 4% in 2023 and another 5% in 2024," and that X would lose "more than 32 million users worldwide by 2024."

As TechDirt editor Mike Masnick noted: "Elon Musk may have accidentally revealed how much X/Twitter usage had dropped." Looking at industry standards estimates and past Twitter disclosed numbers and comparing them to Musk's prior claim of "550 million Monthly Users," Masnick suggested that this implies a meaningful drop in users — potentially about 50 million monthly active users — since the takeover.
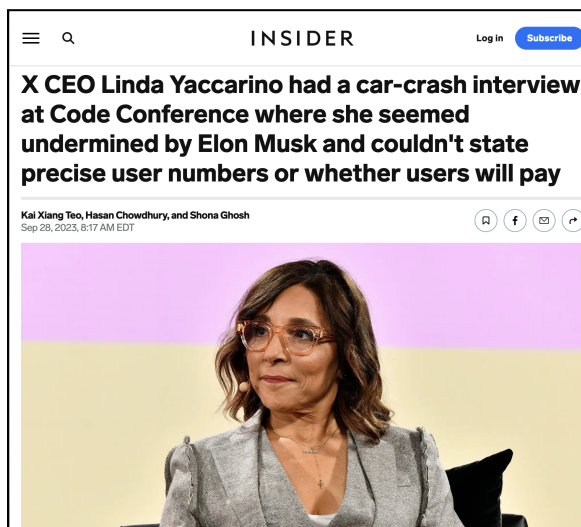
## Outside Estimates of Web Traffic to Twitter and X.com

Using Similarweb data tracking US visits to X.com/Twitter.com's desktop and mobile sites, we see this pattern of general decline from September 2022 to August 2023:

Monthly US Visits to X: September 2022–August 2023 (Similarweb)
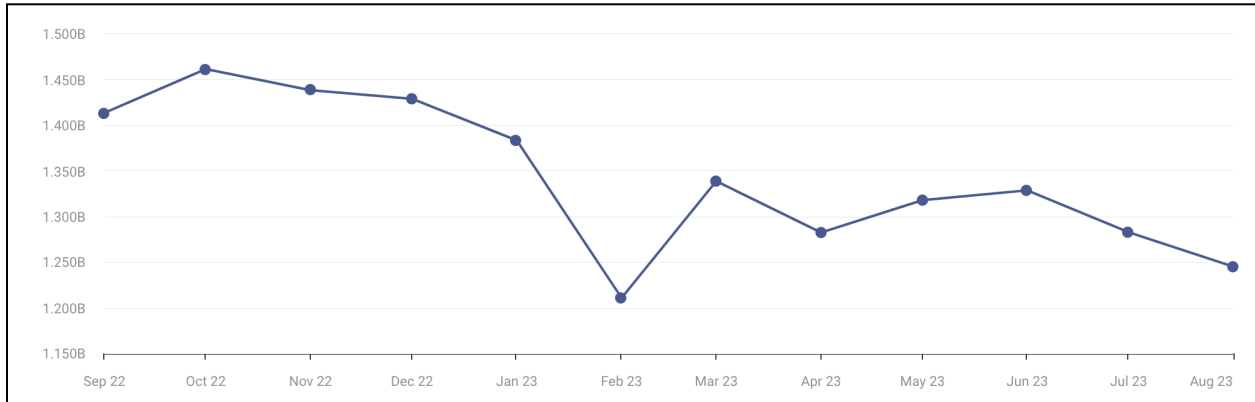
SEMRush, another web analytics firm, sees the same trajectory in worldwide web desktop and mobile users going to the X website. The drop in mobile web usage is even more pronounced than the overall drop in unique global users visiting the website over the last months.

Monthly Global Visits to X: March 2023–August 2023 (SEMRush)
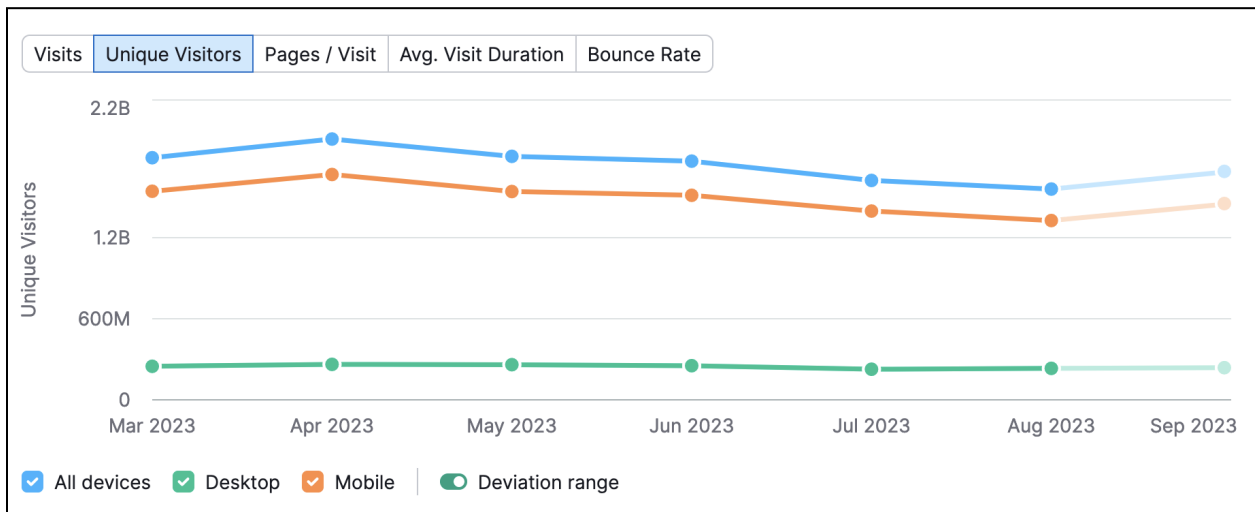
Twitter Blue ("X Premium") Usage Continues to Underperform

Twitter's paid subscription service, Twitter Blue, now rebranded "X Premium," continues to see far lower numbers than Musk's rosy predictions. [When Musk was still attempting to get out of his purchase of Twitter in June 2022,](#) he predicted that the premium version of Twitter's service would have 69 million users by 2025; current estimates from researchers (per Mashable) indicate that the number in August 2023 was at **only about 827,615 users.** The premium service will need to show unprecedented growth over the next 15 months to meet Musk's stated goal.

[Bloomberg News](#) reports that X will add tiers to this offering of "Basic, Standard, and Plus," which would "allow the company to charge customers different amounts depending on how many ads are shown."

All of these metrics point to a downward arc accelerated since July with the X rebranding. It is possible that this is a temporary drop in app store installation numbers, or that as users grow more aware and accepting of the X brand, this trend may change.

We will continue to track the impact of this rebranding in future reports.

Other Turmoil Inside X: Toxic Content, Moderation Issues, and Technical Choices

Another factor that impacted the X Migration this quarter continued to be the internal effects of content, advertising policies, and controversies — many of which were incited by Elon Musk's posts themselves.

In an August 10 interview with CNBC, Linda Yaccarino [claimed](#) that brands are "protected from the risk of being next to" toxic content and

she said, "by all objective metrics, X is a much healthier and safer platform than it was a year ago."

However, other online researchers this quarter found the following:

- Researchers at Media Matters found that the X platform "has been placing ads for brands like The New York Times Co.'s The Athletic, MLB, the Atlanta Falcons, Sports Illustrated, USA Today, Amazon, and Office Depot on a verified pro-Adolf Hitler account that encourages antisemitic harassment." After this research went public, at least two major brands dropped their advertising support of the X platform.

- Other researchers at the Tech Transparency Project and the ADL (whom X had also previously threatened to sue over lost X revenue) found that the X platform had been actively monetizing search results from overtly racist and extremist accounts.

- Auschwitz Museum researchers found that Holocaust denial posts were allowed to stay online for days only to be removed after public outrage.

- Media Matters for America researchers found NFL advertising placed on prominent white nationalist accounts.

- The Center for Countering Digital Hate, whom X is suing for earlier research, posted a new report claiming that "X is failing to remove neo-Nazi, antisemitic, and racist posts despite being aware of the hateful content."

Over 100 rabbis and Jewish organizations wrote a letter criticizing Elon Musk and X for creating a "breeding ground for some of the most dangerous antisemitic discourse in America." This all comes at a time when Elon Musk has posted publicly blaming the ADL for many of X's advertising woes, and said they should actually be called "the Defamation League."

Around this time, Musk also tweeted that "the Soros organization appears to want nothing less than the destruction of Western civilization." Amidst this controversy, Musk had a public meeting with other largely politically

conservative Jewish leaders, where he defended himself and the X platform against charges of being antisemitic or irresponsible in content moderation.

In other areas of content-related controversy this quarter:

- Musk himself has repeatedly posted misleading content about vaccines, falsely implying that early studies that showed very high protection from the COVID vaccines have since been proven inaccurate.

- Researchers at Media Matters for America also quantified the dramatic number of times Musk amplified, promoted, and repeated the content from far-right, anti-LGBTQ+, anti-immigration, anti-vaccine, and QAnon-related accounts.

- The European Union issued a report finding that X had "the highest ratio of disinformation posts of all large social media platforms." As Bloomberg noted, "Elon Musk's X was cited as the biggest outlet for peddlers of disinformation as the European Union urged Silicon Valley platforms to step up their vigilance to combat Russia's 'war of ideas.'"

Also over this quarter, technology choices, glitches, and potential choices surfaced that caused further turmoil inside the platform.

- Tech press at the *Washington Post* noticed that inside X, links to outside mainstream news sources including the *New York Times* and Reuters, as well as to X competitors such as Threads and Bluesky, were loading much more slowly than links to other websites. (Links from X to external sites first pass through a redirect on the X site, enabling them to add delays to the redirect.) A deeper analysis by The Markup showed that X users have to wait approximately 2.5 seconds to access connections to Facebook, Instagram, Threads, Bluesky, and Substack among other sites.

- Others noted the X algorithm was changed to downranking *all* X posts with links outside X, making them less amplified by the X "For You" feeds.

- Elon Musk suggested that X would remove the "block" feature, replacing it with a far less effective new version of a "mute" feature that would still let harassers follow and see users' content.

- Researchers [found code that implies that X may soon require all users to "verify your account by providing government-issued ID,"](#) suggesting that all users will ultimately "need to provide a photo of their ID and a selfie." There are some new finds in the code that "suggest that it may be getting closer to an official launch."

- For a few days in early July, X issued a dramatic rate limit on post views purportedly to ["address extreme levels of data scraping and system manipulation" by competitors](#): X Premium accounts could only read 6,000 posts per day, non-paid accounts 600 posts, and new non-paid accounts only 300 posts. After reaching that limit, users saw a message that said, "Rate limit exceeded."

- X changed how it [displays web links in posts](#) and as the Verge noted, it is "no longer showing headlines on articles shared on the platform. Instead, X is only showing the article's lead image and the domain it will link you to." Many users [are complaining that this leaves such posts confusing.](#)

- The quarter ended with [Elon Musk in a live stream chat](#) saying that X was "moving to having a small monthly payment for use of the X system" in order to combat "vast armies of bots." As of this report, it is still unclear whether or not this change will actually occur, something CEO Linda Yaccarino [would neither confirm nor deny](#) in a recent interview.

- Lastly, the attacks in Israel, stress tested the new X as a platform - that is a common source for breaking news, was performed worst, [researchers noting](#) that recent changes "haven't just made X useless during a time of crisis. They've made it actively worse."

Amidst all of this, the [X Corp quietly disabled a feature that allowed users to report electoral disinformation](#) in every country except the EU (which has stricter laws on this). X's [most recent head of Trust and Safety also just quietly left that position](#).

After this, Musk laid off more employees working on trust and safety, specifically firing a large number of employees working in the election integrity teams. Twitter's former head of Trust and Safety at Twitter, Yoel Roth describes the firing:

"Today, the last remaining staffers that had expertise in election security were all summarily fired..." Roth then focused on one particular senior staff member who was terminated: "People started asking me 'What do you predict about 2024?' I was like: 'Look, there was one person still left in Twitter in Dublin, that single-handedly kept global elections from going off the rails. I hired him myself. He is brilliant. As long as he can stick it out, there is hope. [But then he was] summarily fired.'"

Ad Revenue Sharing Launched - including to many Questionable Accounts

Along with other content and advertising-related issues, one important new feature launched this quarter that we had reported was in development in past reports: X's new ad revenue-sharing effort giving some X Premium users a portion of the revenue raised by advertising on their tweets.

This effort was finally implemented within weeks of Meta's launch of Threads — potentially a strong indicator that X sees Meta as a competitor for the attention and retention of the highest-reach Influencers and creators.

In order to be eligible for revenue-sharing, users must have at least 500 followers, be a paid member of "X Premium" or a paid "Verified Organization," and have received 5 million impressions on all of their organic social media posts over the previous three months. These users are paid out of Twitter's overall ad revenue sees overall, based on the number of impressions their content sees by other X Premium accounts.

> **Farzad Mesbahi** 💲 Paid
> @farzyness
>
> The more haters you have in your replies the more money you'll make on Twitter.
>
> ▶ GIF ALT
>
> 2:59 PM · Jul 13, 2023 · **602.6K** Views

Examples of Ad Revenue Sharing to Extremist Accounts

In September, X announced that it has "paid out almost $20 million to our creator community."

As we noted in previous reports when this was first announced, researchers immediately predicted this would be rife for abuse and incentivize

> **You may be missing out on ads revenue sharing!**
>
> If eligible, you must be subscribed to X Premium to receive a share of ads revenue.
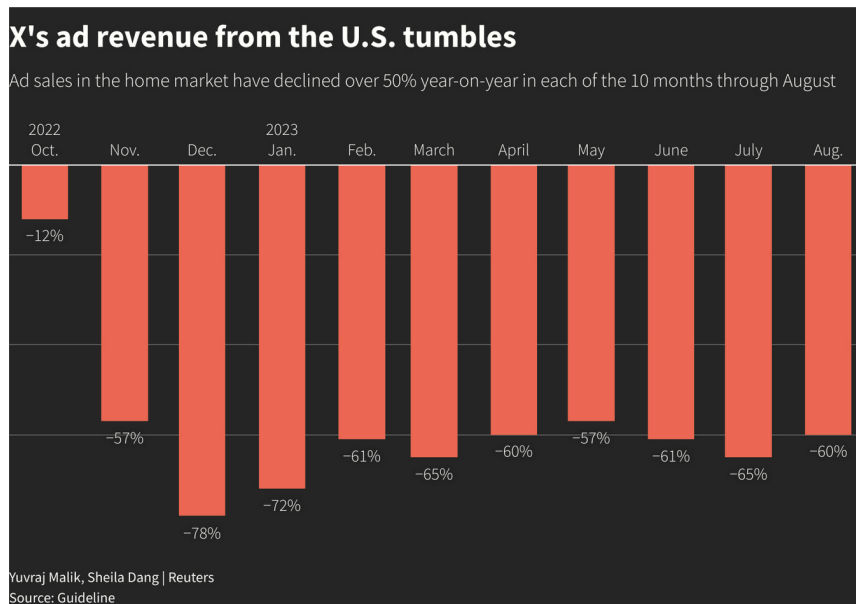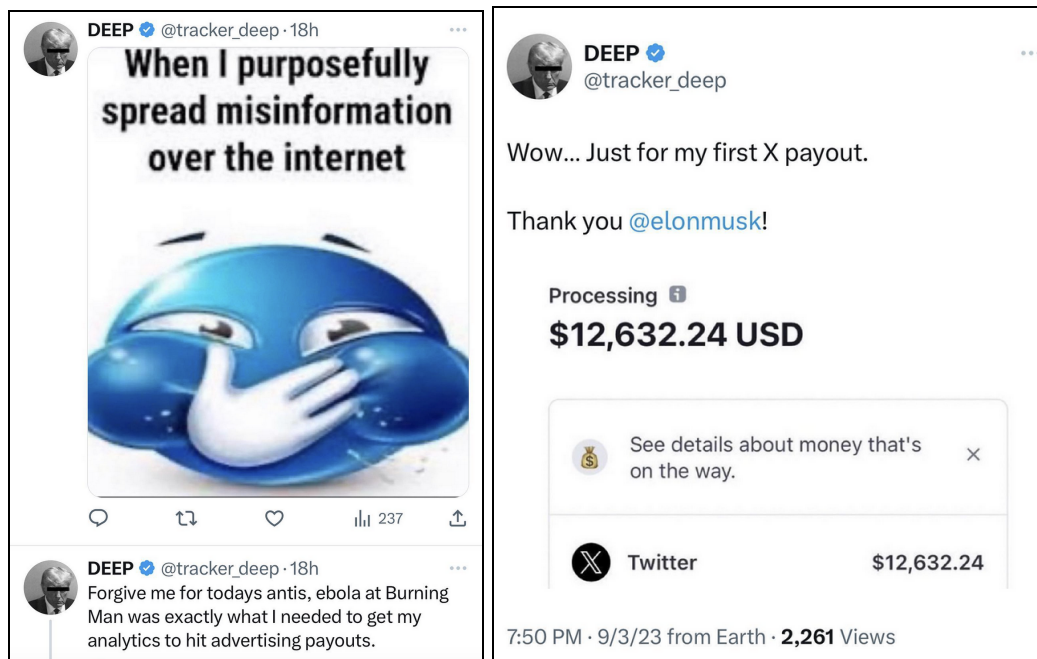>
> Sign up to X Premium to get access.
>
> **Subscribe today**

controversial, incendiary, and potentially toxic content.

After revenue sharing went live in July, the tech press and researchers immediately posted examples of this abuse live on the platform:

- As [Variety reported](#), "Among those in Twitter's payout pool was **Andrew Tate**, who tweeted that he received $20,379 under the new program....The former pro kickboxer, who once tweeted that women should 'bare [sic] some responsibility' for being raped, last year claimed [tech platforms had banned him for what he said were "traditional masculine values."](#) Tate and his brother are currently facing criminal charges in Romania for alleged rape, human trafficking, and organized crime; this has not stopped him from receiving revenue-sharing payments from X.

- Ad watchdog group CheckMyAds Institute [found that the overtly racist account](#) [AlphaFox78](#) is also part of the ad revenue sharing program: "Some of the AlphaFox's content with the most views is about celebrating white pride, transphobia, being anti-woke, burning the Pride flag, and driving through protesters." AlphaFox78 said they didn't "want to share my info on amounts as it 'makes people jealous.'"

- Media Matters for America researchers [found](#) "**multiple right-wing figures known for spreading misinformation and extremism have already collectively earned tens of thousands of dollars in ad revenue** under the platform's new ad revenue sharing program. [Multiple of those figures](#) were previously banned from the platform and reinstated under current owner Elon Musk."

One apparent example of the ad revenue sharing program directly inciting disinformation was a widely shared claim that instances of the Ebola virus were detected at the Burning Man playa, while 70,000 attendees were stuck in the desert due to torrential rains. This was pure disinformation, and one of the central sources for this false story was a fake screenshot and post from [a verified X Premium user](#) who [later posted the revenue split they would see on his posts.](#)

Reuters notes the toll on advertising inside X since the Musk purchase of the company:

"Monthly U.S. ad revenue at social media platform X has declined **at least 55% year-over-year each month** since billionaire Elon Musk bought the company... Ad revenue in August, the latest data available from Guideline, declined 60% year-over-year."

The organized effort from "Stop Toxic Twitter" continued this quarter, adding new members and continuing to pressure advertisers to suspend ad buys on the platform.

The Rise of Instagram Threads - Followed by a Sprint to Fully Build out the Offering

In early July 2023, Meta launched their long-awaited direct Twitter competitor: Instagram Threads, the first major new social media network to launch in the last seven years.

Threads was the culmination of a very rapid development process at Meta which had [only begun in January 2023](#) as "a small incubator team within the Instagram org."

The launch of Threads, which had been planned for later in July, was moved forward by weeks to take advantage of particularly opportune timing — a weekend during which X suddenly implemented rate limits on tweet views (outlined above), purportedly to reduce scraping of its service, an action that received significant attention not only from tech press but also from mainstream press.

Meta

Introducing Threads: A New Way to Share With Text

July 5, 2023

The Threads launch was also built to integrate Instagram users' social graphs, enabling users from that platform to very easily rebuild their initial social graph and following on Threads. Threads became the fastest-growing initial launch in software in history, not only in social media history but of any consumer software launch.

[Threads was the most downloaded non-game launch in over a decade of tracking by analysts.](#) About thirty million people joined Threads in just one day after its inception, and about 100 million in the first week, overtaking ChatGPT's previous record and becoming the fastest-growing platform ever.

Meta ceased revealing Threads' user count on July 11, 2023, when it reached around 105 million users. Another estimate from Data.AI found [over 150 million downloads of the Threads app](#) in its first partial week live; Data.ai noted this was the fastest

momentum of new app downloads to date, more than five times faster than that of the previous record holder, Pokémon Go.

Meta has not issued new numbers since the first week of the service. The current best estimate from data analysts at Quiverquant (made using a combination of techniques) is that Threads has about [132 million registered users](#).

By Quiverquant's team's estimates, Threads is gaining new users **at a rate of about 1 million every two weeks.**

As new Threads users' social graphs were re-created immediately from their existing Instagram feeds, new accounts — especially those with large numbers of previous Instagram followings — grew from zero to [tens of thousands](#), [hundreds of thousands](#), or even [millions of followers](#) seemingly overnight.

After this meteoric initial wave, the social activity on Threads [cooled almost immediately.](#) User engagement on Threads dropped in part likely due to features that Meta had not yet implemented, in order to hit their early launch — and knew they needed to add quickly. Features such as a web/desktop version, keyword content-based search, account switching, and a chronological feed of followed users were added within the first two months after launch and are now live. Trending topics [appear to be coming very shortly.](#)

The most recent data from two third-party sources show a picture of where Threads usage has stabilized. **If this data bears out, Threads's current place makes it by far the most robust of the current alternatives to X to date.**

Mobile analytics firm AppFigures described this dynamic: "It [Threads] dipped right after peaking, but has since stabilized and is now seeing the kind of downloads you'd expect from a new social media app...."
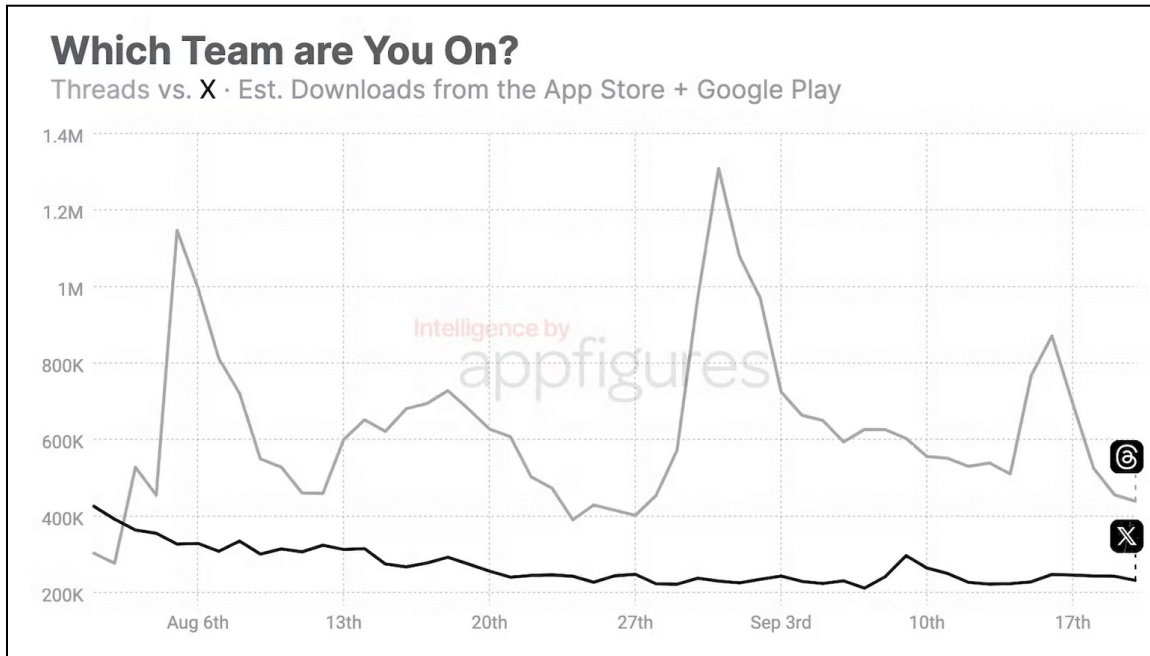
Additionally, digital researcher [Insider Intelligence](#) (as reported by [the Verge](#)) "**expects Threads to have 23.7 million U.S. users in 2023 [...] Its closest rival, X, will have 56.1 million U.S. users** in 2023." They also predict that "X's monthly active users will have dropped to 47 million by 2025 if users continue to defect from the platform [...] At that point, 23.3% of Instagram users will also use Threads...**In the coming years, "[Threads] will close the gap with X.**" We note that the Insider
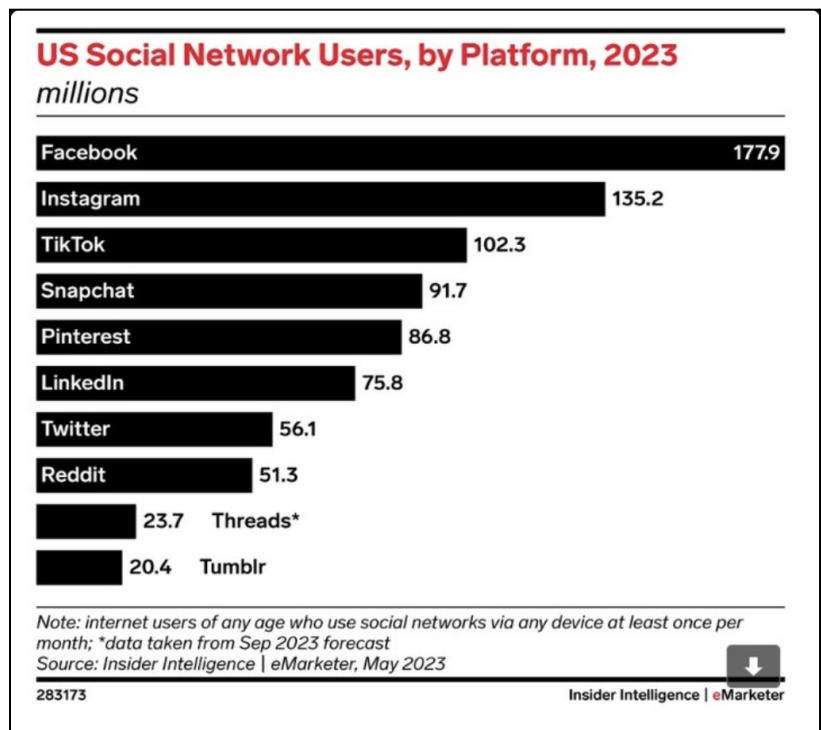
Intelligence data does not estimate time spent per session on Threads, and Meta has not made this data available.

In a September [interview with the Verge](), Mark Zuckerberg talked about Meta's internal numbers on Threads and their strategies for growing engagement and scale over time:

"It's off to quite a good start. Obviously, there was a huge spike, and not everyone who tries it out originally will stick around immediately, but the monthly activities and weeklies...**I don't think we are sharing stats on it just yet but it's good. I'm feeling very good about that.**"

Elsewhere in the interview, he lays out Meta's philosophy on building out Threads over time:

"Someone should build a version of this that can be more ubiquitous [than X has been]....I think how we set the culture for Threads early on in terms of being a more positive, friendly place for discussion will hopefully be one of the defining elements for the next decade as we scale it out. We have a lot of work to do."

Zuckerberg lays out his playbook for how Meta hopes to evolve Threads from here:

"We have this playbook for how we do this: Phase one is build a thing that sparks some joy and that people appreciate. From there, you want to get to a place where there is retentive, where people who have a good experience with a thing come back... once you have retention, then you can start encouraging more people to join, but if people are not going to be retained why would you ask people to go sign up for something? ....Step three is growth and scaling the community...."

[Shortly after the Threads launch](), Zuckerberg wrote: "It'll take time to stabilize, but once we nail that [engagement] then we'll focus on growing the community. We've run this playbook many times (Facebook, Instagram, Stories, Reels, etc.) and I'm confident Threads is on a good path too." On Meta's [Q2 earnings call, Zuckerberg said of Threads](): "I'm highly confident we're going to be able to pour enough gasoline on this to help it grow."

This aspirational future for Threads that Zuckerberg paints is far from certain. This is now a race, and the next months will be critical to its thriving or failing.

Other notable new social media efforts launched by tech giants have failed in the past after significant launches.

Most notably, Google+ at one point announced 90 million registered users only to sink after its efforts at user engagement failed.

The Meta team has these resources going for it in this fight to retain user engagement and grow:

- Because of Threads's integration with Instagram, **it has the fourth-largest social network in existence as an engine to drive growth and engagement**. Some Threads-Instagram integration has already been launched, and more is sure to come. To put that into perspective: Meta only needs one in four Instagram users to enable Threads accounts to be equal to X today.

- Threads is still currently unavailable in the European Union as they determine how to make the service comply with EU privacy and data regulations; Meta has indicated that **Threads will enter the EU market once the legal requirements are clear**, another potential major driver of users and engagement when/if it occurs.

- **Meta apparently hasn't yet launched a significant online advertising campaign across their platforms** driving engagement to Threads, possibly waiting for new features to be added to the platform. That online ad push from across Meta's platforms seems very likely to come at some point soon.

- Furthermore, given all that has happened over the previous year, **it is very likely that there will be more unrest inside the X platform**; each bad-press incident for X has the potential to drive more users away from that platform, which might lead them to Threads among other places.

- If the Insider Intelligence estimates we listed above prove true, **Threads has stabilized already in terms of ongoing visitors** — after just three months since launch — to have just under half as many monthly active US users as X. Insider Intelligence also predicts that "next year, Threads will grow its US user base by 26.4% to 30.0 million, and another 13.1% in 2025 [...]

Can Threads quickly "backfill" absent features, mature newly added ones, re-engage lapsed early adopters, and sustain and grow their current user base? Core new

features for Threads [are being released on a weekly basis,](#) and the development team has been working quickly to add the capabilities that were intentionally missing from the bare-bones release.

But the outcome of this race is far from clear.

The next few months will be critical, and we'll be watching closely in future reports for the first signs that suggest they are on a trajectory to fully challenge X and can avoid being relegated to a "Google+-like" fate.
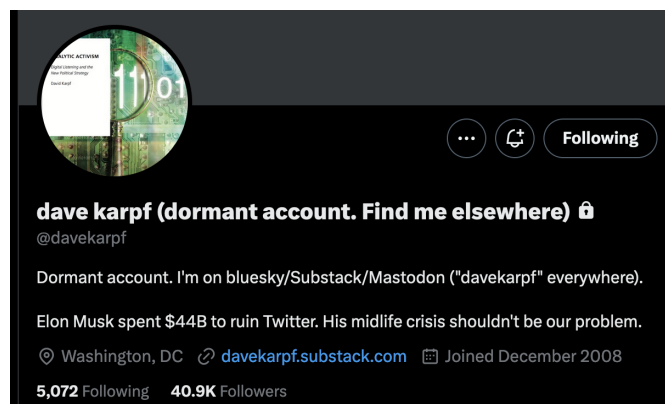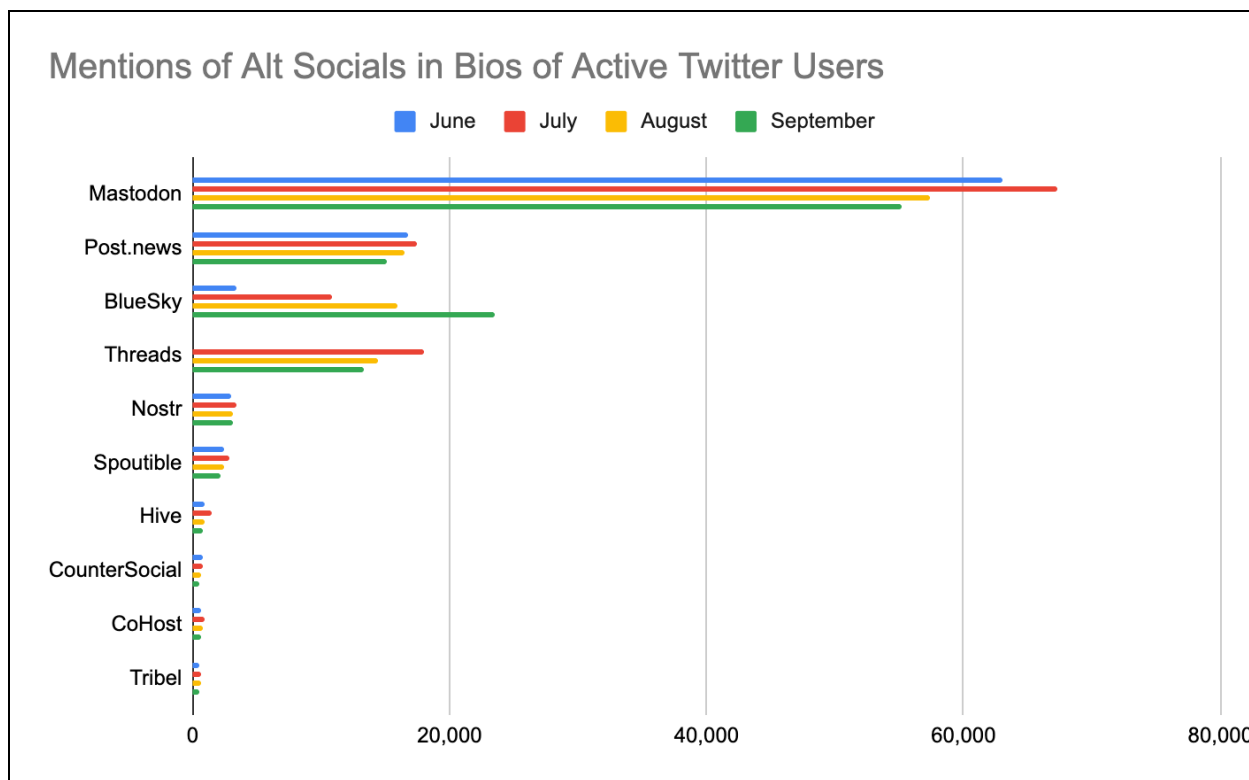
Where are X Users Migrating To?

As we did with [all of our prior quarterly reports](#), we scanned the entirety of the current active user base of X, and looked for one important signal as to the scope and scale of what platforms users were migrating to: their user bios.

While this is not a comprehensive metric (many users create new accounts on other platforms without listing the new platforms in their X bios) it still is a common practice that has gone on since well before Elon Musk bought the company.

We view this as one marker among many, but an important one to continue studying each quarter — an indication of the number of X users who are far enough along in their "shopping" for new platforms to do the work of updating the new platforms on their X profile page.

We also note that this is a metric that only measures *active* X users: if a user did not post at least once on the X platform during this quarter, we no longer count them. We list our full methodology on this original research in the appendix of this report.

Mentions of Alt Socials in Bios of Active Twitter Users

Legend: June (blue), July (red), August (yellow), September (green)

Categories (top to bottom): Mastodon, Post.news, BlueSky, Threads, Nostr, Spoutible, Hive, CounterSocial, CoHost, Tribel

X-axis: 0, 20,000, 40,000, 60,000, 80,000

Our scans found that user bio profiles that listed alternate platforms were consistent with the data from the mobile app download space this quarter: **Mastodon, Bluesky, Threads, and to a degree, Post News** are the main beneficiaries of this quarter's X migration.

This quarter, the size of the other alternative networks, including **Nostr, Spoutible, Hive, CounterSocial, and Tribal, all suffered monthly reductions or flatlined in this research.**

These findings are also generally consistent with the web traffic estimations we analyzed using the web data analytics tool, SEMRush.

Unique US visitors for second-tier alternative networks, March 2023–August 2023 (SEMRush)
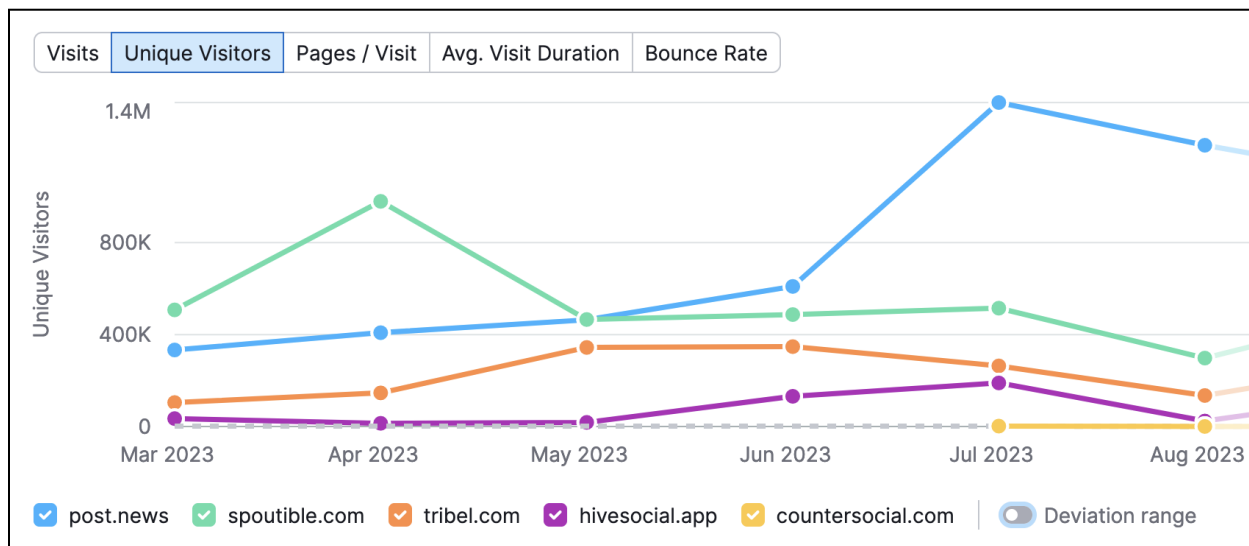
Of this tier of sites, only the social network Post, founded by former Google executive Noam Bardin, witnessed an increase in unique users this quarter. All other sites saw significant declines in unique users, albeit to varying degrees. Post continued to focus mainly on news content, launching its new Android app along with its previous iOS mobile app.

The Nostr platform, which our scans found holding a steady but small following as an X alternative, may be unknown to those who are not engaged in the cryptocurrency development communities. It is challenging to measure Nostr using web traffic because it's a decentralized social media platform. It's also debatable even inside the Nostr communities as to how to track Nostr from within the network in order to identify unique human accounts rather than spam or bots. We will keep watching the Nostr space, especially looking to see if it breaks out of its "crypto niche" in which it now lives.

Additionally, several former Twitter executives announced a new name for their startup, "Pebble," at the very end of the quarter in September. We will keep an eye out for their launch in the next reports, but it is too early to include them in this one.

Threads, Bluesky, and Mastodon in the Top Tier of X Alternatives

These metrics point to Threads, Mastodon, and Bluesky as continuing to hold the top tiers in users' attention as they shop for X alternatives, with Threads by far the largest of these.

It is noteworthy that Threads continues to affirm its eventual support that it will be adding full interoperability with ActivityPub, the protocol that undergirds the Mastodon and Fediverse networks and has made some early signs of that which we describe later.

In our [previous report](#) we gave extensive background information on each of these alternatives; for readers new to any of these, and who want more details and histories of each platform, we recommend that report.


Having discussed Threads, which is unquestionably the most well-known X replacement, earlier in the report, we now provide a brief update on the latest news this quarter from Mastodon and Bluesky.
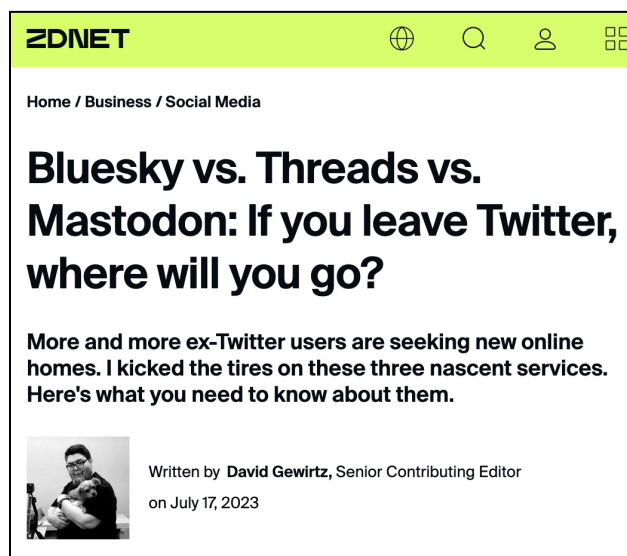
Mastodon and the Open Social "Fediverse"

Activity on the seven-year-old, open-source, decentralized Mastodon network is challenging to quantify. Mastodon servers, and the larger group of Mastodon-interoperable servers and services that use an [open protocol called ActivityPub](#), are known collectively as "the Fediverse."

Unlike X, Bluesky, or Threads today, Mastodon is not one centralized platform, but over 17,000+ servers —
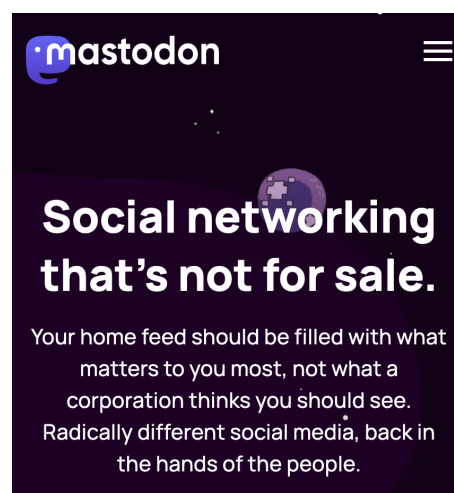
and hundreds of new servers being set up each month.

Fedidb.org, one of the most reliable sources for analysis of Fediverse usage data, finds **10.7 million registered users of Mastodon/the Fediverse, approximately 1.5 million of which are active monthly users.**

The "Fediverse" of open social users on Mastodon and other interoperable software platforms **is growing at about 1.5 million new registered users per month.** The pattern of user registration spikes on popular Fediverse servers corresponding with chaotic events at X also continued this quarter, a sign that users are migrating to the Fediverse from X/Twitter in response to events there.

Other analytics measured over 1.2 billion social posts across the constellation of Fediverse users.
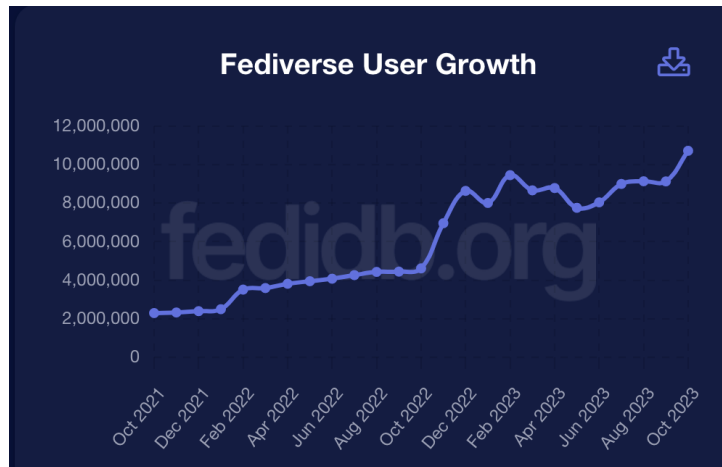
Mastodon version 4.2 Launches

Mastodon specifically crossed a major milestone this quarter, launching the much-anticipated version 4.2 of their server software which brought many user interface and onboarding improvements to the platform.

Among those improvements was full-text search, replacing the limited search capability for accounts or hashtags in previous versions of Mastodon. Other added features included dramatic improvements in how users on the web interface can engage across servers and more advanced hashtag support.
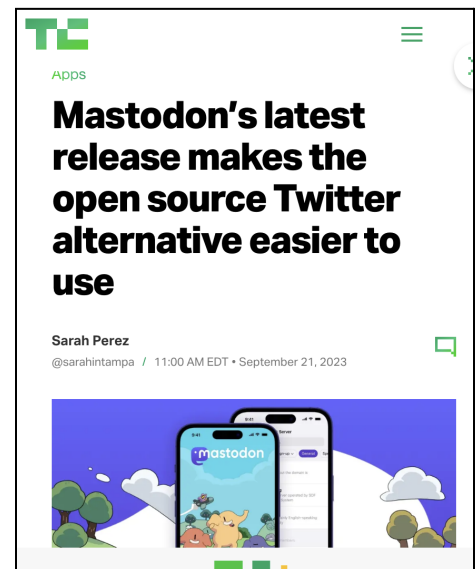
However one of the most anticipated features in Mastodon version 4.2 was an improved onboarding process. As Techmeme noted: "The bigger changes are those coming to onboarding — a process that's often been dubbed too cumbersome and confusing for would-be users who want to try the open source, decentralized Twitter alternative [...] More importantly, however, is that the decentralization Mastodon promotes is becoming more mainstream."

As Techmeme CEO Gabe Rivera documented, here is how the latest version of Mastodon compares to the other X alternatives:

What news watchers and commentators tend to care about

	X (Twitter)	Mastodon	Bluesky	Threads	T2
userbase reach (do newsmakers post?)	Best-in-class (but falling)	Spotty	Spotty	Second best-in-class	Spotty
reverse-chron following feed available	Yes	Yes	Yes	Yes	Yes
lists (reverse-chron list feed available)	Yes	Must follow	No	No	No
multi-list view ("TweetDeck view")	Yes, but $	Yes	No	No	No
posts viewable on web by non-logged-in users	Yes	Yes	No	Yes	Yes
threads and profiles viewable on web by non-logged-in users	No	Yes	No	Yes	Yes
text and link search?	Yes	Negligible coverge	Text + some links	No link search, censored terms	Yes
quote posts	Yes	Effectively no	Yes	Yes	Yes
easy to follow users and engage across the network	Yes	No	Yes	Yes	Yes
available in EU	Yes	Yes	Yes	No	Yes
decentralization? *	No	Yes	Eventually?	ActivityPub TK?	No
chaotic or stable leadership? *	Chaotic	Stable	A bit chaotic?	Stable	Stable
relationship with journalists *	Hostile	Good	Standoffish	Good (of late?)	Good
API coverage? **	Yes, but $$$	Yes	Yes	No	No

* Most news watchers and commentators now appreciate downstream impacts of these factors, even if the first-order impacts can be overlooked.

** Most news watchers and commentators benefit from tools built on APIs, even if they don't develop on the platforms directly.

Bluesky Continues Growth — with Growing Pains

Bluesky, along with Mastodon, is one of the best-known, decentralized social network alternatives to X. Initially funded by Twitter and backed by Twitter co-founder Jack Dorsey before spinning off as its own for-profit company, Bluesky continues to retain Dorsey as one-third of its board. Bluesky remains in a closed beta that can only be joined by users getting an "invite code."

This quarter Bluesky saw a number of key milestones, along with turbulence and growing pains.

Bluesky continued to see some contention inside the user community relating to its handling of content moderation on its server, and it continued to evolve how it would handle content moderation in a future decentralized version of its platform.

Bluesky also crossed a key milestone by passing over 1 million registered users, even while it remains a closed invite-only platform. It has introduced a number of additional features, such as the option for users to personalize their timelines by selecting (or even creating) their own social media algorithms. Bluesky also began providing a paid custom domain service; this is the BlueSky company's first attempt at a business model, which they claim will not be the last one, and they will continue "experimenting with different strategies and services" as well.

Bluesky has recently opened up beta tests of their more full "decentralized" server but as of today, as a service, it remains a single centralized offering with a single centralized server. Developers there have listed that adding this decentralization is one of the key elements they will need to have live and robust before they leave the invite-only status.
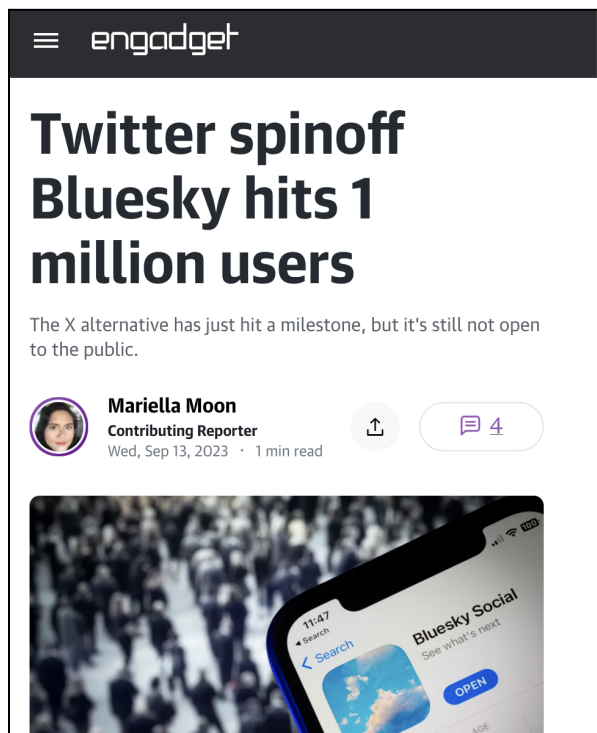
We will watch closely as Bluesky works to cross this key milestone over the next months.

The Developer Migration

Another trend we have been identifying since Musk's takeover of X a year ago is the ongoing "developer migration" away from X, which we have documented in our past reports. **In the technology space, the platforms that software developers gravitate towards often become the winners in a competitive landscape.**

This developer migration has been spurred on by past issues such as X changing the cost of API access to the X platform to levels that drove away many third-party mobile app developers and web developers, and also X's dramatic increases in its charges for data access, which crippled both third party researchers studying the platform and all but the biggest enterprise software providers.

As Musk and Yaccarino continue to express the ambition that X will become a single "Everything App" — and moved in that direction by making it more difficult for outside developers to work with the platform — third-party application developers have moved to greener pastures.

In addition to this more developer-unfriendly environment, there is an increasing trend and interest by developers in the emerging "open social web" and developing "open social protocols" such as ActivtyPub (which powers Mastodon), the AT Protocol (that powers Bluesky), and to a lesser extent the Nostr protocols.

- Threads, Tumbr, and Post have all reaffirmed that building out support for ActivityPub — making them interoperable with Mastodon and the Fediverse ± is on each of their software roadmaps. Threads took the first small step at this integration by adding Mastodon compatibility identity verification support to the Threads platform.
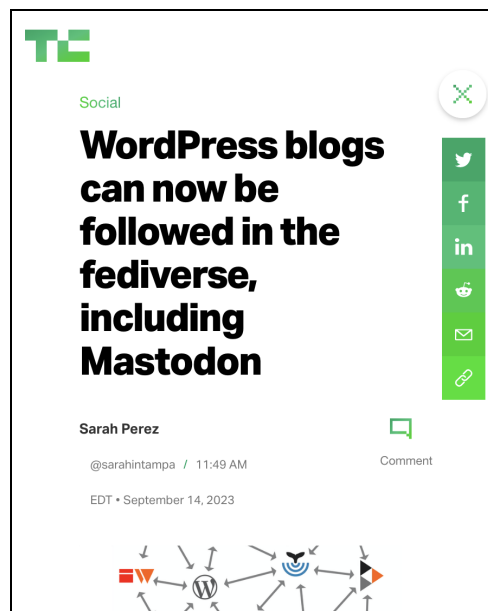
- Automattic, the company that develops WordPress, launched version 1.0 of their plugin for ActivityPub which makes any Wordpress CMS able to interoperate with Mastodon and Fediverse users. Automattic has announced that they are offering this new plugin functionality to all Wordpress.com paid users. WordPress CMS powers approximately 43.2 percent of the entire web.

- Flipboard hinted at new, deeper integration of ActivtyPub into its application, which already had early integration into both Mastodon, Pixelfed, and Bluesky decentralized social networks.

- Mozilla, makers of Firefox, continued evolving their (currently) invite-only beta of their Mastodon server. Key new features include a custom user interface based on the open-source Elk client and integration into Mozilla's own identity system.

- Jimmy Wales, the original co-founder of Wikipedia, also revealed plans to establish a new network that would rival Reddit and Twitter. The platform would also support ActivityPub after its debut, making it compatible with Mastodon and the Fediverse.

- The BBC launched its own Mastodon server and set of Mastodon accounts, including BBC R&D, Radio 4, and 5 Live. They write: "We're learning as we go, and we'll write about what we discover in the hope that it might be useful for others."

- The nonprofit Independent Federated Trust and Safety (IFTAS) was finally funded and launched in support of its first efforts supporting content moderation and distributed Trust and Safety support. Their initial efforts focus on the Fediverse, but this organization also looks to support content moderation efforts on Bluesky as that network evolves. Yoel Roth, formerly the head of Twitter Trust and Safety, is a part of their advisory planning leadership.

As *The Verge* editor-in-chief Nilay Patel put it, "It's clear all the [developer] action is on Mastodon. **That is where the app developers are, the platform is accelerating, and the underlying fediverse boundaries are growing."**

Yoel Roth, former head of Twitter Trust and Safety, described this moment: **"We are in probably the most exciting moment in the last 15 years of social media because finally there is a lot of energy in building new stuff.** We are seeing a lot of new entrants [...] **At the moment it is anyone's game.** [...]And that's really cool

because from a consumer standpoint, for the first time in 15 years, it's not something that is taken for granted that your network is on Twitter or Instagram, it's wherever."

If/when Threads finally adopts and implements ActivityPub, it would represent the single largest use of a decentralized protocol by far to date.

Threads Engineering Manager Jesse Chen, when asked about the next steps for the new social network in September, confirmed that those plans are still on track: "I'm also excited about our commitment to join the Fediverse and support the ActivityPub protocol. At our scale, it's an incredibly exciting technical and regulatory challenge. Joining the Fediverse and building interoperability with other networks to create a more diverse and thriving public conversation ecosystem is something we remain committed to working towards."

The Path From Here

This maelstrom of change is likely to continue; it is almost certain that the social media space we have observed over the past year will continue to accelerate.

We will continue our quarterly reports, tracking the second year of Elon Musk's ownership of X and all that it inspires, both inside the newly redesigned X platform - as it strives to recreate itself in Musk's vision - and on all the platforms that strive to build out what many inside the original Twitter platform dreamed it could become.

Appendix: Methodology of Searches for Non-X platforms in X users Bios:

Using data pulled from the media intelligence firm, Meltwater, we conducted keyword searches with the **bio:""** operator with terms relating to each of the website URLs of the various alternative platforms to determine how many users each month had the terms in their bio description.

For Mastodon, we searched for links to the top 110 most popular server instances as per this dataset.

Where some of the platforms had common words as their names (for example, Hive or Threads) that are regularly used not in reference to the apps, we put in search restrictions to weed out as many false-positive results as possible. However, Post proved to be especially challenging to distill down to only app-related references, so we had to restrict our search parameters to only those including migration terms specifically to the app to be able to get the closest total to the true numbers without over-inflated values from unrelated mentions.

The dataset available to search is only users who actively posted each month, so if a user had left the alternative platform in their platform and ceased using the app, they wouldn't be in our totals as made clear in the body of the paper.

This same methodology was used consistently in each of our quarterly reports.