State of Social Listening

Results Analysis

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2025

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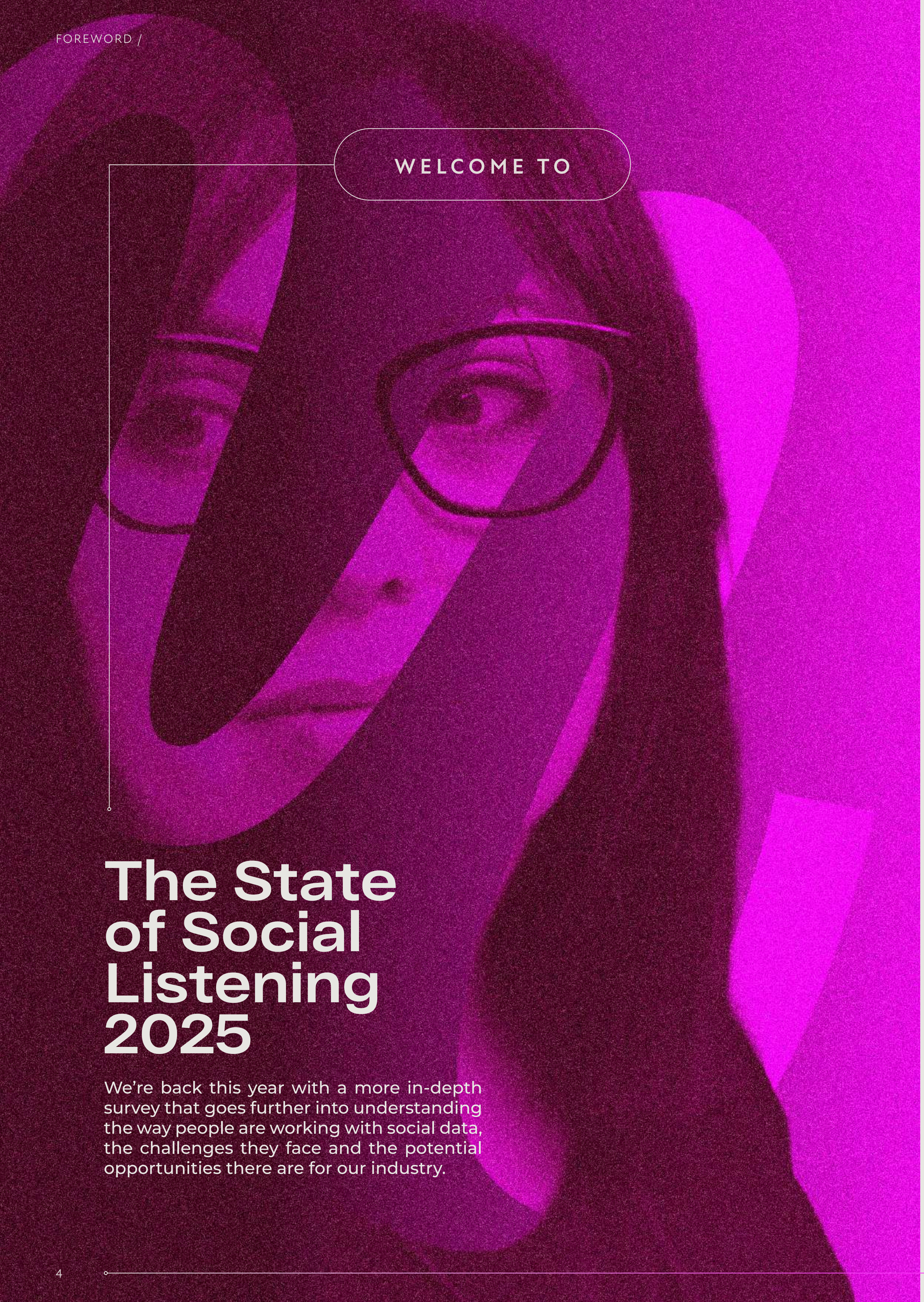
Contents



WELCOME TO

The State of Social Listening 2025

We're back this year with a more in-depth survey that goes further into understanding the way people are working with social data, the challenges they face and the potential opportunities there are for our industry.

This year's survey came against the backdrop of instability. Not only is the world facing an uncertain geopolitical landscape, but continuing economic challenges have meant job cuts and budget restrictions. Often, it's the less understood areas of businesses that are first for the chopping block, and social listening hasn't escaped. The continuing rise of genAI has also changed the way we work and caused some businesses to consider removing humans from certain roles altogether. This is potentially premature as the value that genAI brings is often overstated.

Despite that, this year's responses show there's a lot to be optimistic about.

Investment in social listening technology continues to increase, the main objectives for doing social listening appear to show a greater understanding of the potential value of social data, leaders see social intelligence as beneficial to the wider business and, on the whole, practitioners see genAI as a tool to enhance their work, rather than threaten it.

This year, we asked different questions to different groups of respondents - those working in agencies, those at brands and those in leadership positions across both. We wanted to understand whether their experiences differ because of where and at what level they work. The responses of agencies and brands were interesting as they were often quite different. Sometimes this was understandable, due to the nature of the work (one works for clients, one is the client). In other cases, for example, around company culture and attitudes towards social intelligence, the differences are less easily explained but will clearly have an impact on the work each does.

We couldn't ignore genAI either this year. After almost three years of it going mainstream, it's safe to say it isn't a fad, and that it's having a real impact on social intelligence. Almost everybody who answered the survey this year is incorporating it in some way, so we need to think carefully, as an industry, about how and when we should be using these tools to make sure they're working with us, not competing.

We've dedicated a section in this report on how people are using genAI, the challenges they face and how it's helping.

Finally, in part two we've built on the Insights Continuum that we shared in 2024. This year's results show us that, beneath the surface of percentages and use cases, social intelligence is at a turning point. People across the board are looking for more rigour, credibility and understanding. To go beyond data points, graphs and genAI summaries and instead find the meaning behind social data and to learn what truly shapes human behaviour.

At the moment, there's a gap. Practitioners are struggling to make the leap from measurement to meaning, not because they lack ability but because the field itself lacks structure. Most social intelligence professionals are self-taught. They've developed knowledge through practice, not theory. So without theoretical frameworks to refer to, it's unsurprising they rely on technology to lead them to insights. However, this can limit the depth of insight they can produce.

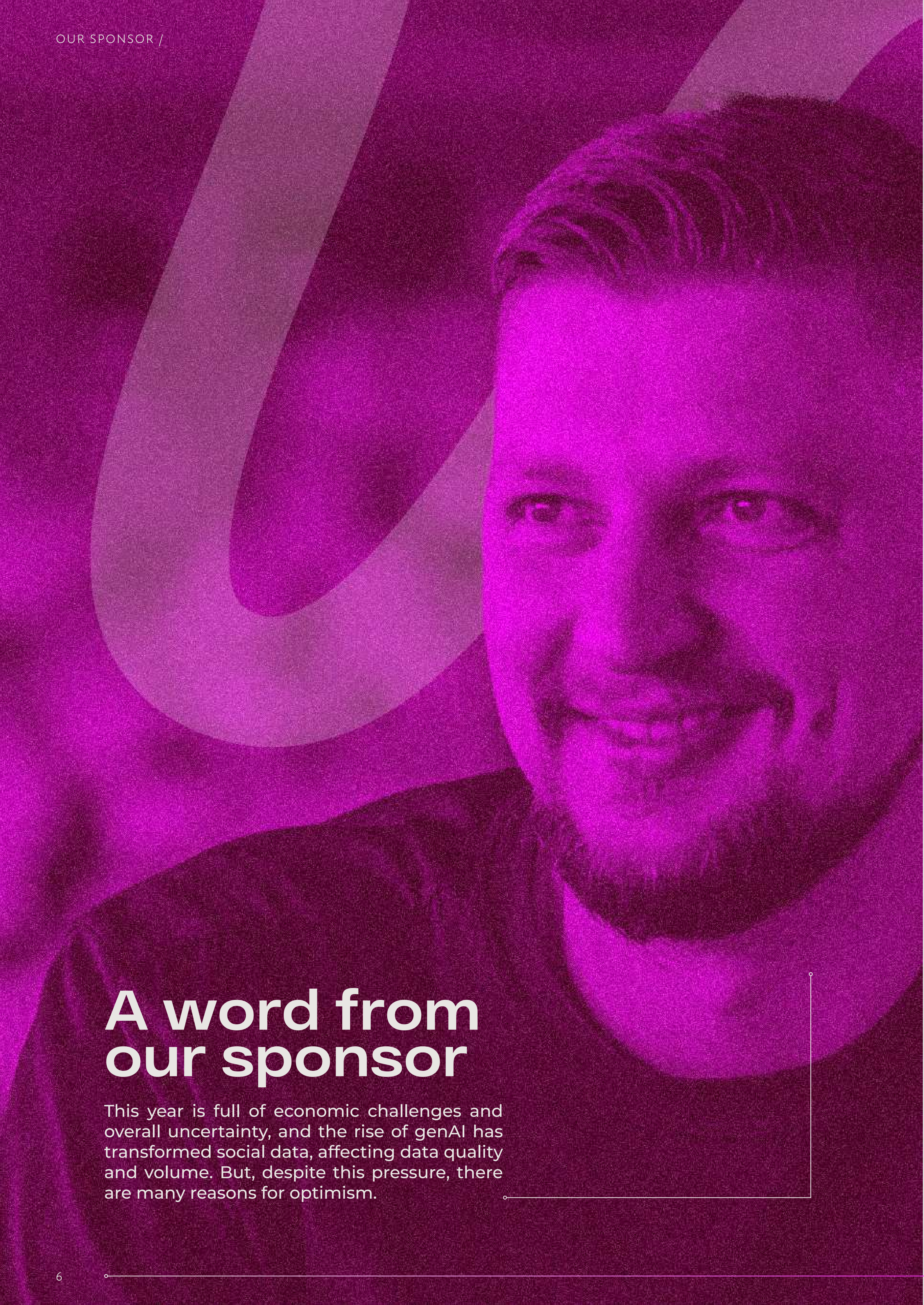
The SI Lab is trying to address this failure of the field to offer a foundation and the updated Insights Continuum is one way we're doing this. By identifying these gaps and offering guidance on how to evolve the practice of social intelligence, we hope it'll lead people to generate richer insights. Because, given the right structure and support, they're capable of achieving much more.

It's also got us thinking about a bigger challenge in the industry, one we'll talk more about in the conclusion of this report...

Until then, we hope you find the results of this year's State of Social Listening survey enlightening and that you can take inspiration from some of the ways your peers are working. It's easy to feel alone in doing this work. But this report shows that you're part of a much bigger community that you can draw on for support. We hope this helps you feel more connected and confident in the work you're doing.

As always, whether you completed the survey or not, feel free to share your thoughts with us, with each other, on social etc. We can't wait to hear what you think.

Dr Jillian Ney
Founder, The SILab



A word from our sponsor

This year is full of economic challenges and overall uncertainty, and the rise of genAI has transformed social data, affecting data quality and volume. But, despite this pressure, there are many reasons for optimism.

Even with ongoing consolidations of tools in many companies, 78.5% of respondents use more than one platform, which is a meaningful increase from 74.8% last year. This might be explained by a significant percent of organizations reviewing their social listening tech stack at least once a year (82.8%) and potentially utilizing multiple platforms to cover different use-cases and also using multiple vendors during transitions between tools.

With the sunset of fact checking programs, polarisation, and the rise of genAI content pollution – data trust is declining. But despite all the controversy and still uncertain future of TikTok in the US – the top 5 most used sources look similar to 2024. Also, respondents are increasingly interested in analytics from non-mainstream sources like Bluesky and Rednote. And Finally, “Data access limitations” is named as the top reason (73.7%) to look for another social intelligence platform. Respondents also named the tech capabilities to be an important criteria in decision making, specifically for visual and audio content – at YouScan we put a significant effort to make this kind of analysis available at internet scale.

Organizations continue to combine different sources of data in a similar way to 2024 where “search data” still represents the most-used additional data source (52.1%). The only major change compared to 2024 is the increased use - almost double - of “Other 3rd party data” (23.3%) which indicates a growing interest in the global context of social data.

Regarding use-cases, the report mentions a desire to solve strategic goals. There are also a lot of tactical use-cases that need to be solved daily with social listening tools, like competitive benchmarking, crisis detection, reaction to the posts and brand health tracking. However, when asked about attitudes towards social listening within companies, it appears brands value and understand it less than agencies do. One potential explanation is that 29.4% of brands outsource more than half of their social listening projects to agencies with “Deep consumer insights” being number one – a reversal from 2024’s focus on own in-house expertise.

There is very little fear of genAI and 91% are already using it for social listening or data analysis. Cross-checking and manual reviewing is the main method of human oversight used to validate genAI results among respondents – which we natively support with raw data references in YouScan’s Insights Co-Pilot.

Looking forward, we see that Social Listening and Intelligence continues to be a very active field. Companies invest considerable effort to stay up to date with the latest technologies, attending numerous product presentations and actively searching for the best combination of platforms to meet their needs. In turn, software vendors are working to incorporate genAI advancements into their products, making it easier to uncover actionable insights. These are exciting times, and I believe technology will unlock more use cases and make the work more enjoyable, while also reducing routine, repetitive tasks.

Leo Lytvynenko Ph.D.
Co-Founder and CEO, YouScan.io

YOUSCAN

Methodology >

Over four weeks in March 2025, we surveyed more than 300 social intelligence professionals across the world to learn more about how they're working with social data, the challenges they're facing and to get their views on the future of the industry. This year, we focused on the role of genAI in social intelligence by asking how it's being used in practice, the impact it's having on the work and their thoughts on how it might evolve.

We wanted to get the perspective of social intelligence practitioners at all seniority levels within brands, agencies and organisations only. This would enable us to get an overview of the state of social listening as a practice, rather than the social listening ecosystem as a whole. Because of this focus, we removed responses from anyone working for SaaS technology providers. This left 241 reponses to analyse.

As in previous years, when we analysed the responses from this year, we looked at both quantitative and qualitative data, including the verbatim responses. Looking at the data qualitatively allowed us to better understand not just what people are doing but how they're thinking, where they're struggling and what they wish they could do differently.

For the first time this year, we also experimented with genAI to analyse the results and explore year-on-year patterns with previous surveys. However, all final interpretation and insights generation were done by humans, because finding meaning still requires critical thinking.

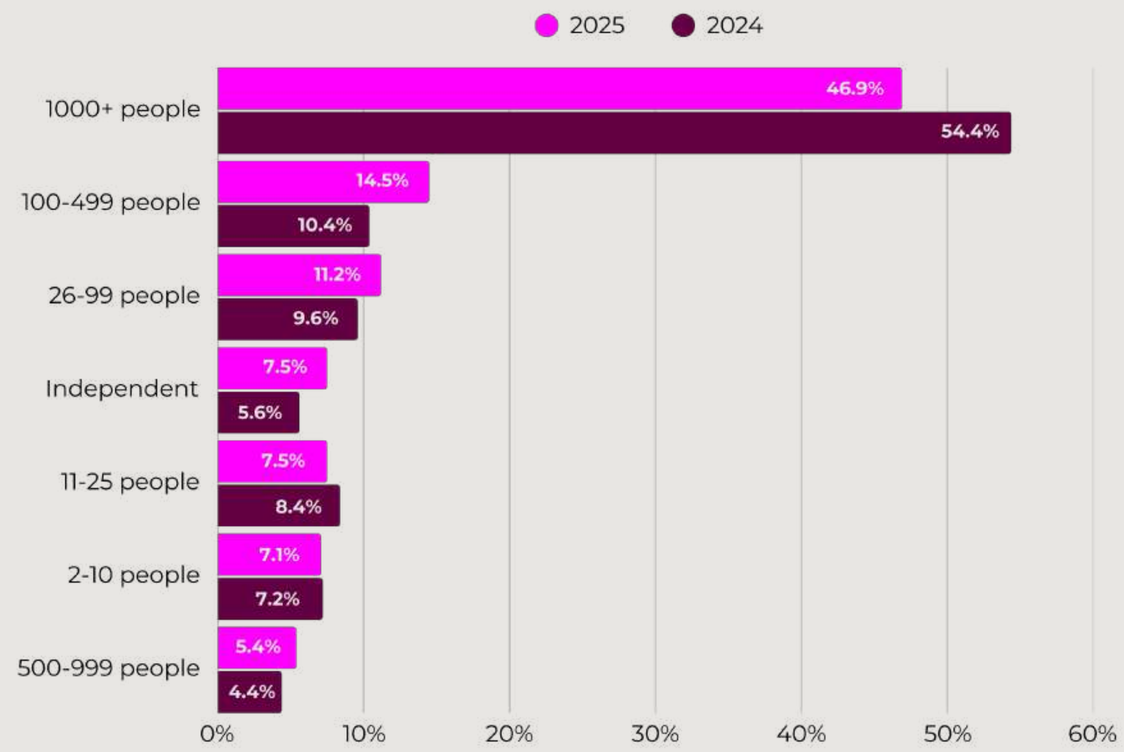
PART ONE

The State of Social Listening 2025

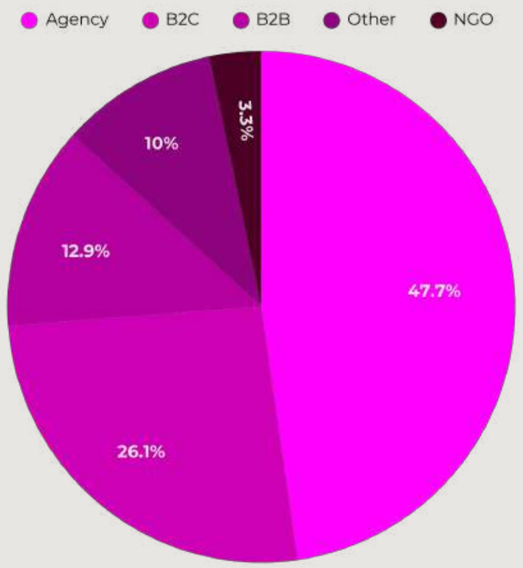
Who took the survey?

The people who responded to this year's survey are very similar to previous years, in terms of the type, size of the companies they work for and geographical location (predominantly North America and Europe). Where there's a noticeable difference is the years of experience. These have steadily increased over time, which is hardly surprising as the practice of social intelligence matures.

What best describes the size of your organisation?



What type of company do you work for?



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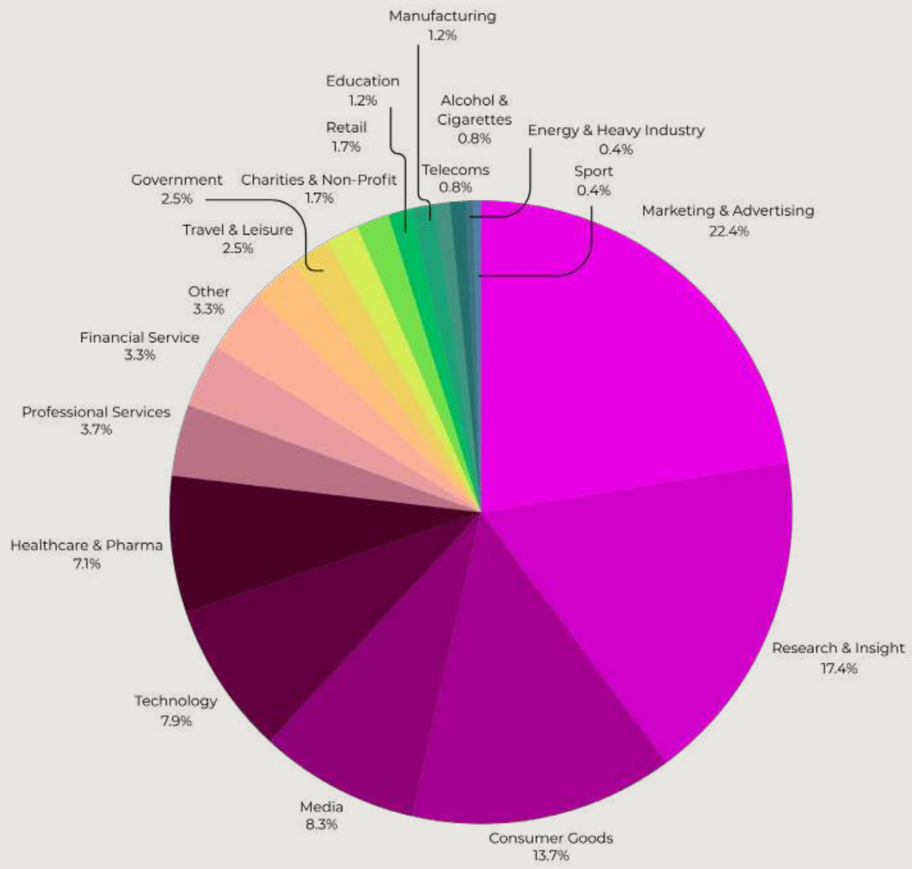
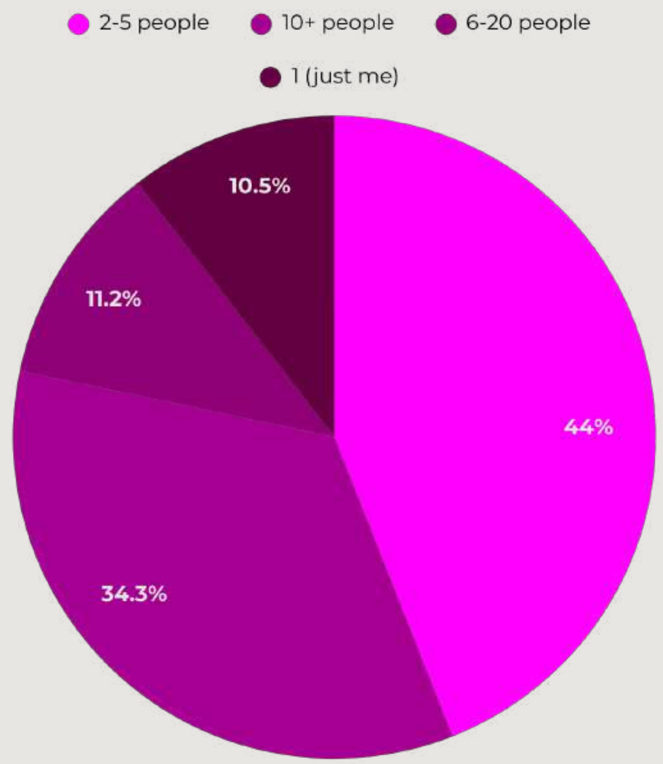
Of those who responded "Other", the most typical responses were **B2B and B2C, Freelance/ self-employed, and government.**

In which business sector is your organisation?

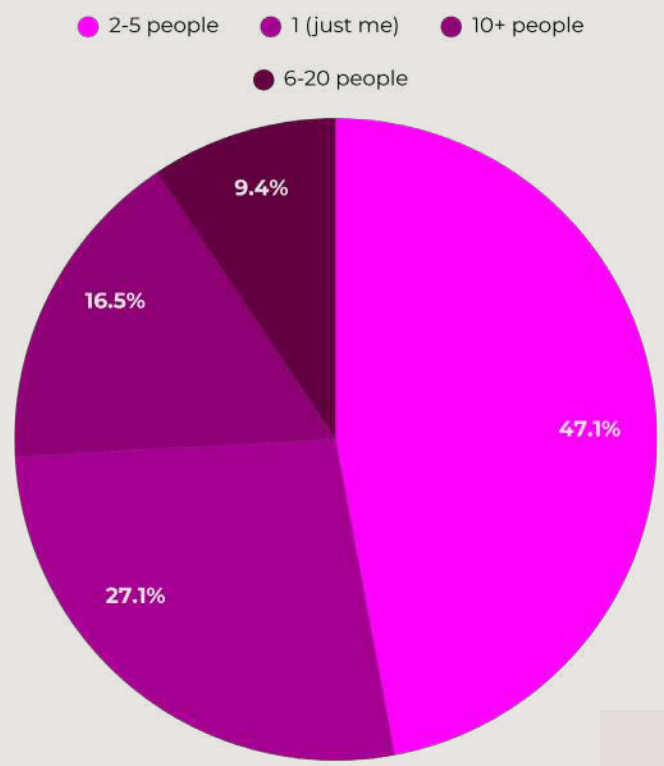


How big is the social listening team in your organisation?

AGENCY



BRAND



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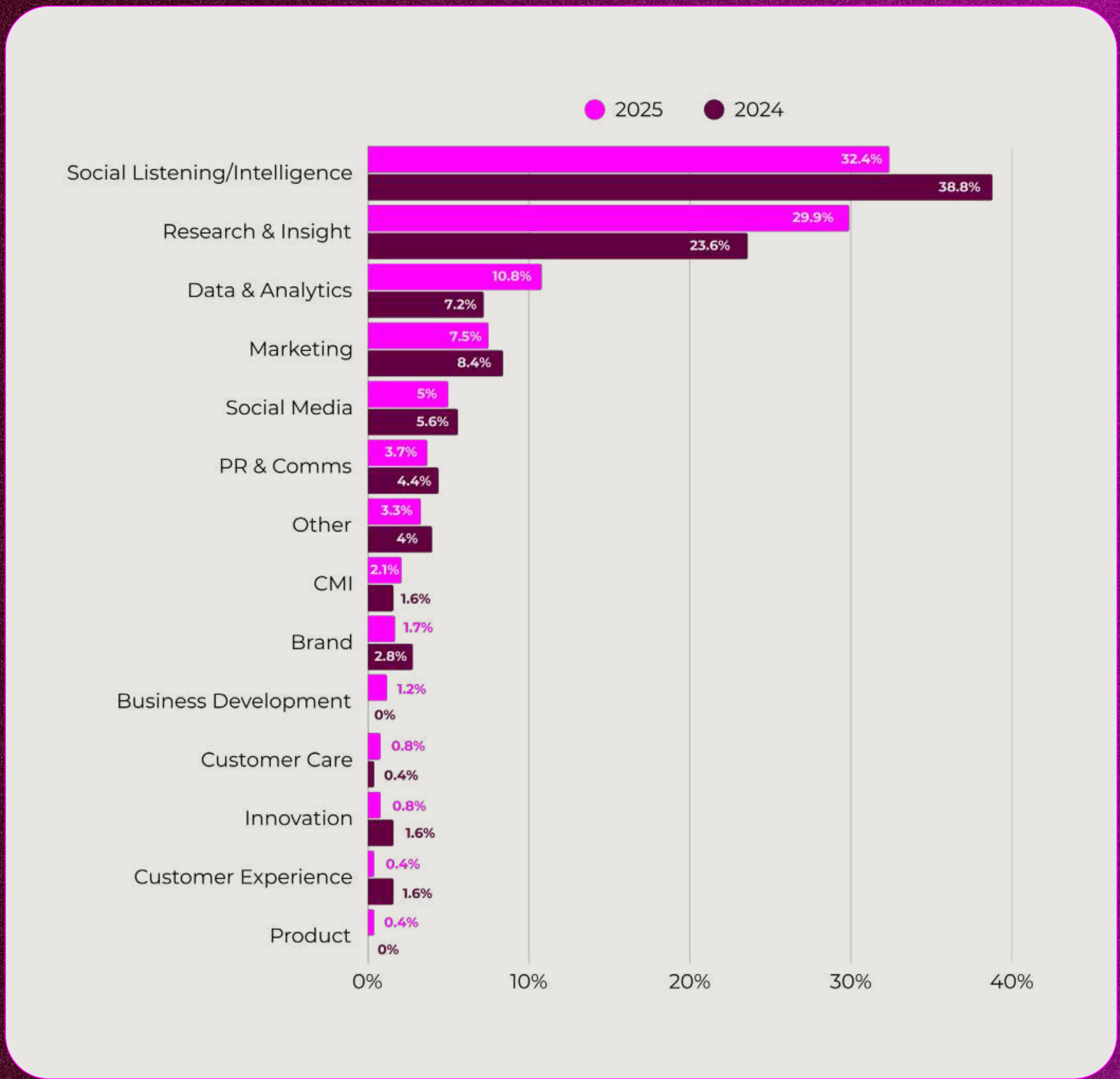
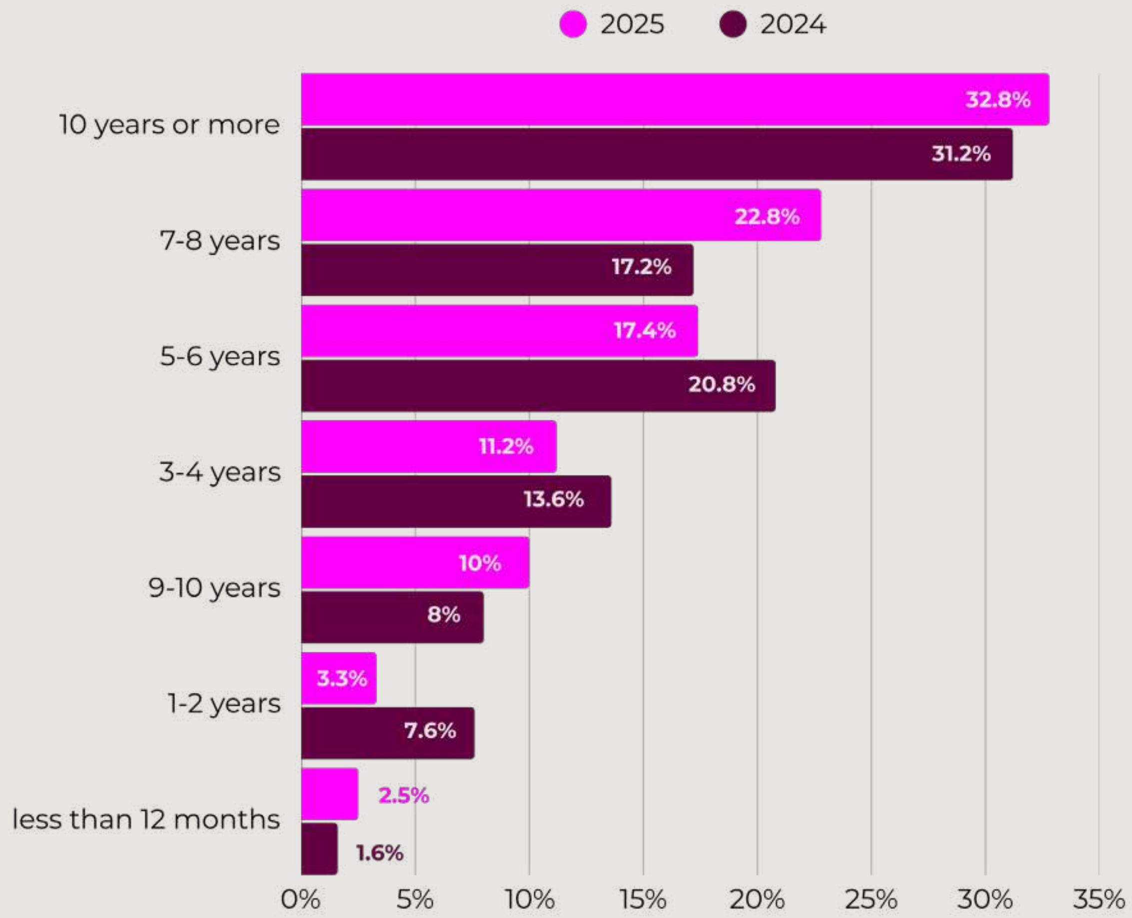
Teams within brands tend to be **smaller** than within agencies.

What best describes the discipline/team you work in?



Social listening/intelligence and research & insights remain the top two disciplines that social intelligence professionals are aligned with. However, the proportion of those in research & insights has grown compared to previous years.

How many years of experience do you have in social data analysis?



The experience that social listening professionals have has, understandably, increased reflecting the time that social listening has been considered a specific practice. Compared to last year, however, the amount of influence they have over purchasing decisions around social data solutions, vendors and partner agencies has decreased slightly. **In 2024, 88.8% had final or significant decision-making influence individually or as a group, whilst in 2025 this has decreased to 85.5%.**

Data Sources

Working with social and internet data

Looking at this year's responses to questions about data sources, a couple of things are clear: **data access is a problem and trust in some data sources is declining.**

This is a recurring theme, year on year. Social listening practitioners want access to data that isn't widely available through social listening tools. TikTok and LinkedIn are the obvious ones. But, given the mess that many of the mainstream social media platforms have created over the last year (fact checking... what's that?) interest in emerging and more niche platforms, such as Bluesky and Xiaohongshu (Rednote), means social intelligence practitioners want to be there too. The tech - or rather the APIs - just hasn't caught up yet.

When it comes to trust in the data, the focus in the past has been on the quality: what is the percentage of bot content? Are the posts actually relevant to the search query? Now, the feeling is whether the platforms themselves can be trusted. This is clearest with X. When asked why respondents were considering changing the data sources they use, several referenced that they wanted to become less reliant or move away from X data. And, anecdotally, several social intelligence professionals have been asked by their leadership not to rely on X for social insights. Due to the often controversial content that's shared on the platform, they feel it's not reliable.

Despite this, X is still one of the most used - and most favoured - data sources. This is probably because it's still the largest and most readily available source of social data in most social listening tools. A high proportion of social listening professionals also showed a preference for text data over other sources. This is also unsurprising when you look at comments around why people aren't using their preferred social data source. Several referenced the lack of quality technology to analyse the data. Given that three of the top five preferred data sources are video- or audio-based, we can assume that people feel technology in this area still needs to develop, whereas they can rely on their social listening tools for text-based analysis more.

And this reveals an underlying trend: **Social intelligence professionals are reliant on technology.**

What's preventing respondents from using the data sources they want to, isn't that they themselves can't access them. It's because the data isn't available through their social listening tools. Rather than using manual methods of collecting and analysing the data sources they think would be best for the project they're working on, many disregard them and, instead, rely on data sources they don't value as much and media that is easier to analyse through their tools. Of course manual analysis can't support the scale that social listening tech does. But, throughout this year's survey, there are little hints that people choose to rely on technology to guide their work. And this reliance might be having an impact on the insights they're generating.

THE RESULTS

The top 5 most used data sources are:

2024	2023
1. Instagram	1. Twitter
2. Twitter	2. Instagram
3. Reddit	3. Reddit
4. Facebook	= 4. Facebook
5. TikTok	= 4. TikTok

These rankings were the same for both Agency and Brand respondents.

19.3% of respondents were likely to change their most-used data sources in 2025.

Some of the main reasons for this include:

- More coverage of new and emerging platforms (including Bluesky and Rednote)
- Increasing coverage of TikTok and LinkedIn
- Diversifying the data sources they work with to reduce reliance on just a few (especially X)
- Adding more video and audio/podcast data
- Changing social listening technology providers has enabled them to access a wider variety of data sources

"The rise of other social networks, such as Bluesky and Threads, has increased the demand for more varied perspectives across the social landscape (not solely X)"

"Clients continue to demand more TikTok data. And as the landscape continues to diversify, we expect to see consumers turn their attention to emerging platforms like Blue Sky and Xiaohongshu."

"Changing social listening provider, access to more sources, less reliance on X."

"We are finding Twitter/X increasingly polarized and not representative, especially of our target audience. But it is the most readily available on our social listening tool, so we are doing everything we can to expand available data, and move away from/separate Twitter/X data. We are also increasingly interested in BlueSky."

What data sources would you like to use but aren't currently?

All	Agency	Brand
1. TikTok (34.7%)	1. LinkedIn (34.2%)	1. TikTok (46.3%)
2. LinkedIn (33.3%)	2. TikTok (29.1%)	2. LinkedIn (35.4%)
3. Podcasts (26%)	3. Podcasts (25.6%)	3. Snapchat (25.6%)
4. Snapchat (21.9%)	4. Snapchat (21.4%)	4. Other (25.6%)
5. Other (19.6%)	5. TV/ Radio transcripts (18%)	5. Podcasts (24.4%)

The most commonly referenced **"Other"** data sources were Bluesky and Threads. This could reflect users looking for alternatives to X (for political reasons) and TikTok (especially in the US, where there is still a threat of a ban).

What's stopping people using these sources?

The most common reasons for respondents not using these data sources include:

- No API access
- The data source isn't included in their social listening tool
- Not enough demand from clients for this data
- Legal concerns around privacy relating to social listening tools that are scraping data from these sources
- Inability to blend data sources and no uniform metrics across the platforms
- Lack of quality technology to handle certain types of data (e.g., video data)

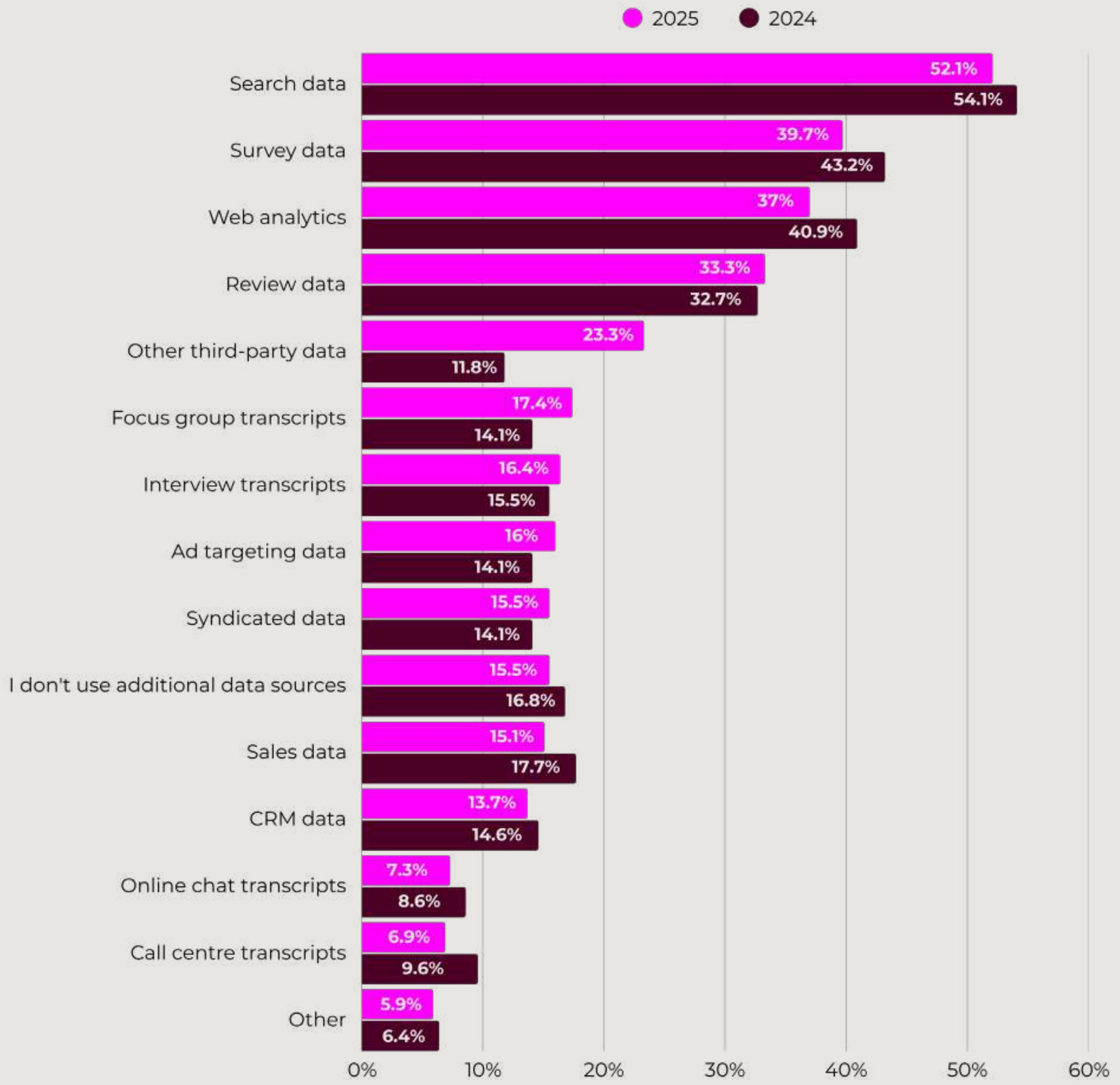
"Lack of APIs in for tools, expensive module additions."

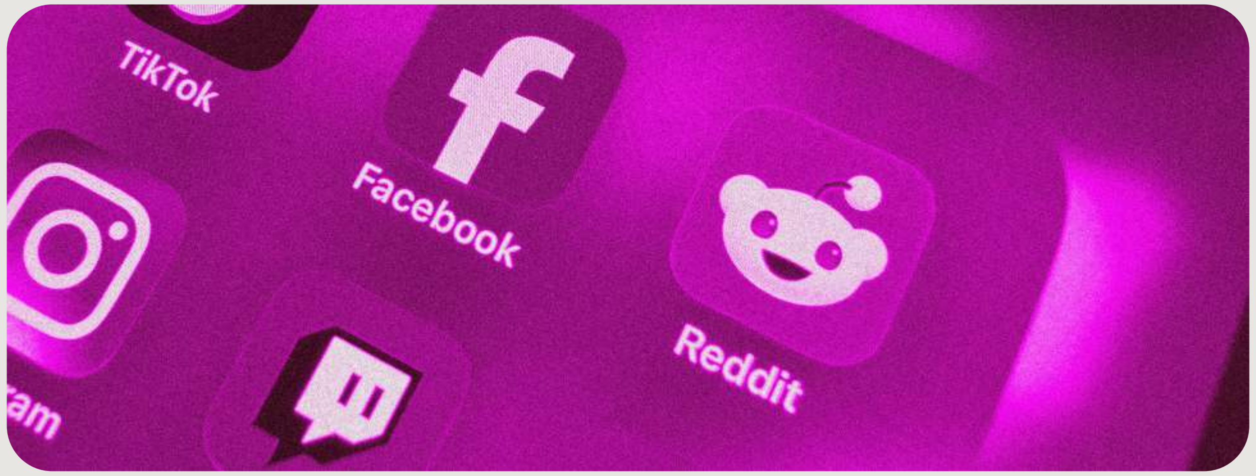
"For blue sky, it's the quality of the API, for visual listening. It is the quality of the technology."

"not aware of good analytics available on forums and fb groups"

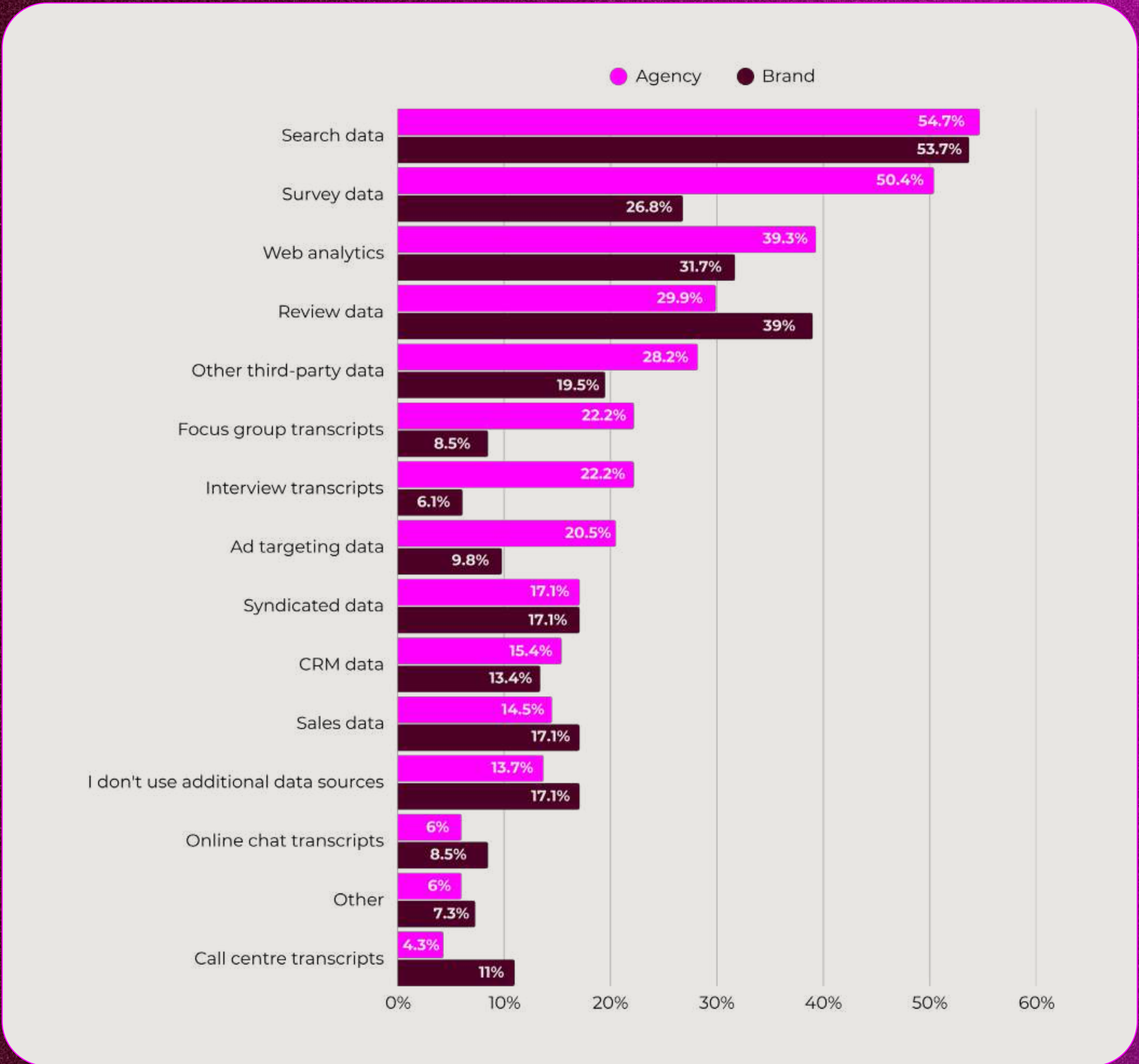
"Depends on the source. TikTok and Facebook, for example, have limited data coming through officially compliant APIs. I do NOT and will not use a tool that is scraping, so while I'd like to have better coverage on those channels, I'm only using the limited amount I can analyze compliantly. For other sources, like Twitch or LinkedIn, there's no API and so I'm blind on those channels, unfortunately. Finally, while many tools now have podcast data, the data is still so noisy that it is almost unusable when pulled into a listening tool... hopefully that improves in the future."

Do you blend social data with any other data sources?

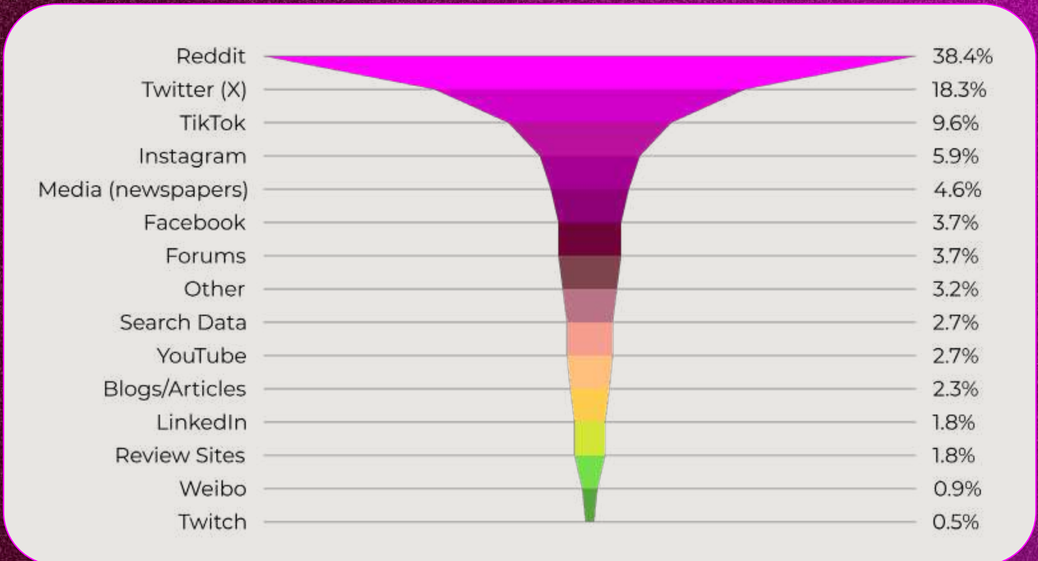




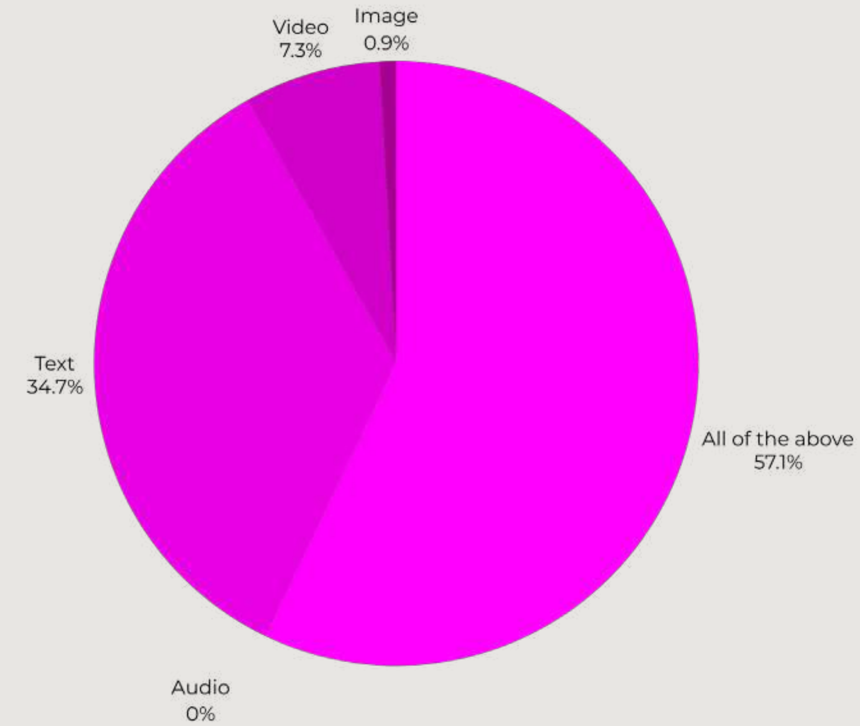
Do you blend social data with any other data sources?



What's your favourite data source to work with?



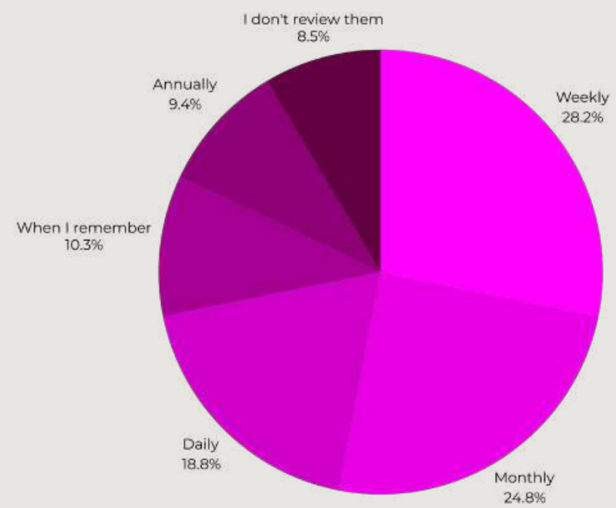
What type of data is most important to you?



Despite the increase in popularity of video content, text-based data sources are preferred. This could be because video-based analysis is still emerging and not every social listening platform has this functionality yet, making it less accessible to many practitioners.

How often do you review your data sources and project queries?

AGENCY



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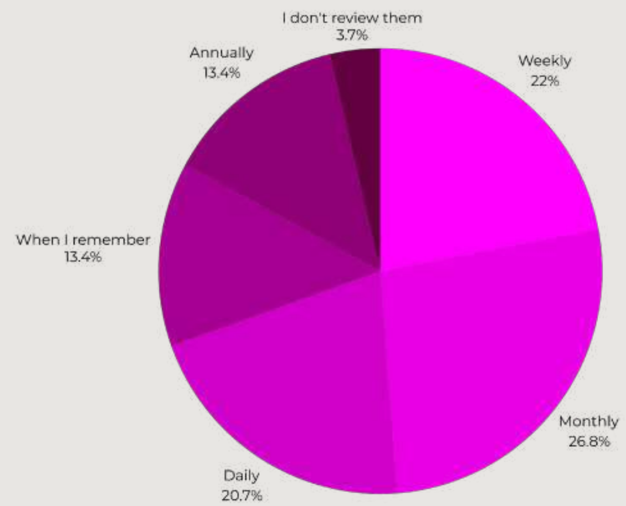


Tools & Tech

Choosing the right tools and technology

For many social listening professionals, this is the most important element of their work. Social intelligence technology (SITech) is what enables them to listen at scale and analyse such a vast diverse range of social data quickly. Each year there's been a consistent increase in investment in technology, even with consolidation of tools. In 2025 we saw that, for respondents who knew how much was being spent on social data tools, the highest proportion were spending US $100-199K. In 2024, the highest proportion were spending US $50-99K.

This could be because technology is generally getting more expensive. As more functionality is added to social listening platforms, particularly through genAI features, the cost to access it goes up. Simultaneously, the cost of data is increasing.

It could also be that people are using more tools. Compared to 2024, when the highest percentage of respondents (25%) used just one, in 2025 over 30% are using two. For respondents working in enterprise companies, 5-10 tools is the second most typical amount of tools to have licenses for. There is also a higher percentage of people using more than 10 tools than in 2024. People are using fewer tools overall than in 2023, however, so cost clearly plays a role.

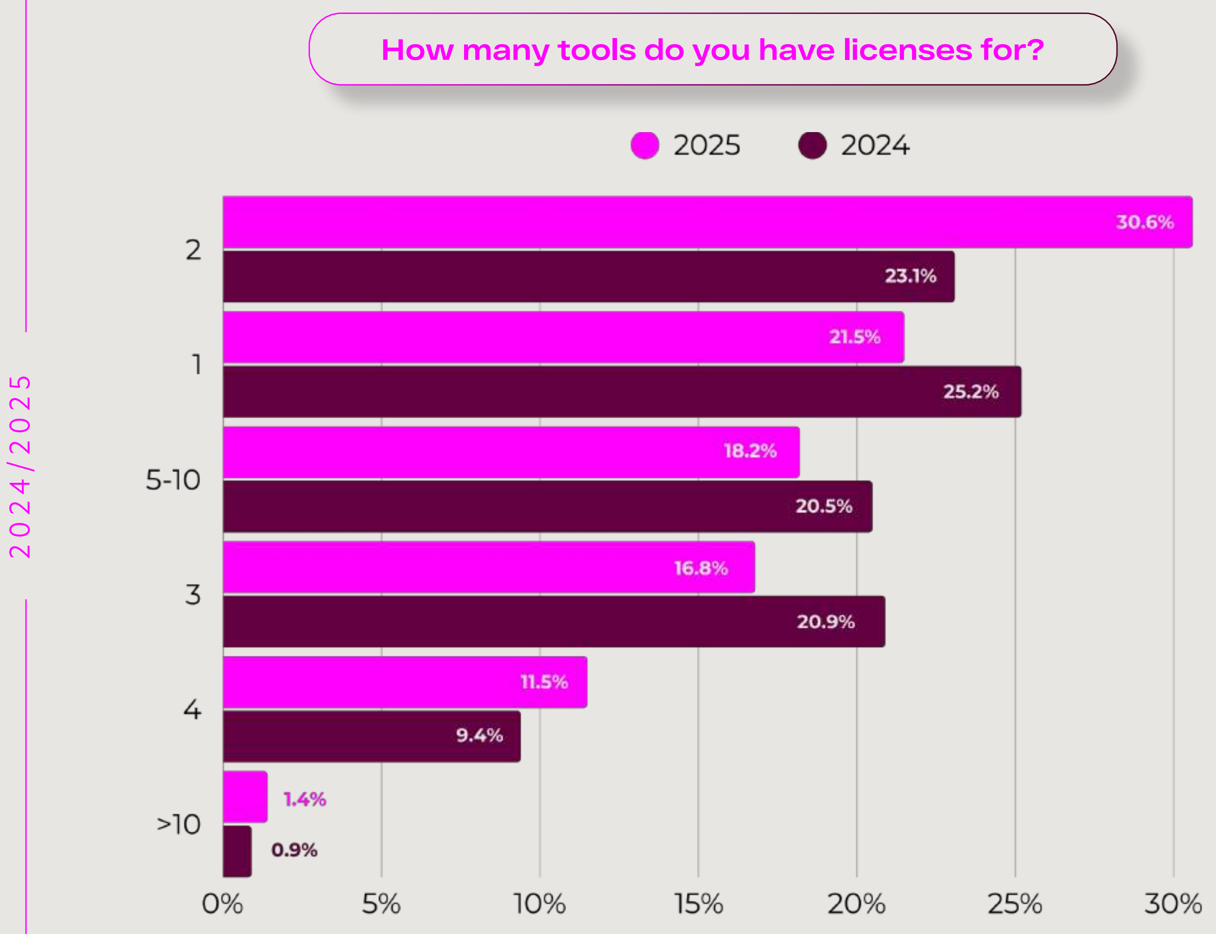
It could also suggest that people are becoming more targeted in the tools they're choosing. Most realise that there isn't one tool that can do everything, so they need to build a tech stack to meet their needs. As the SITech landscape matures, with more tools providing more specialised functionality - this year over 90 were listed - practitioners can choose from a wider range to find one that more specifically meets their needs, rather than having to make do with a few general tools that, combined, might get them the answers they need.

It's clear that choosing the right technology is increasingly important for social listening professionals. Over 27% of respondents are continuously reviewing their tech stacks while 50% are reviewing them annually. And the majority of people (61%) have a process to compare different options when choosing new tools, compared to less than half (48%) who have a consistent approach to analysing social data - arguably, the real work.

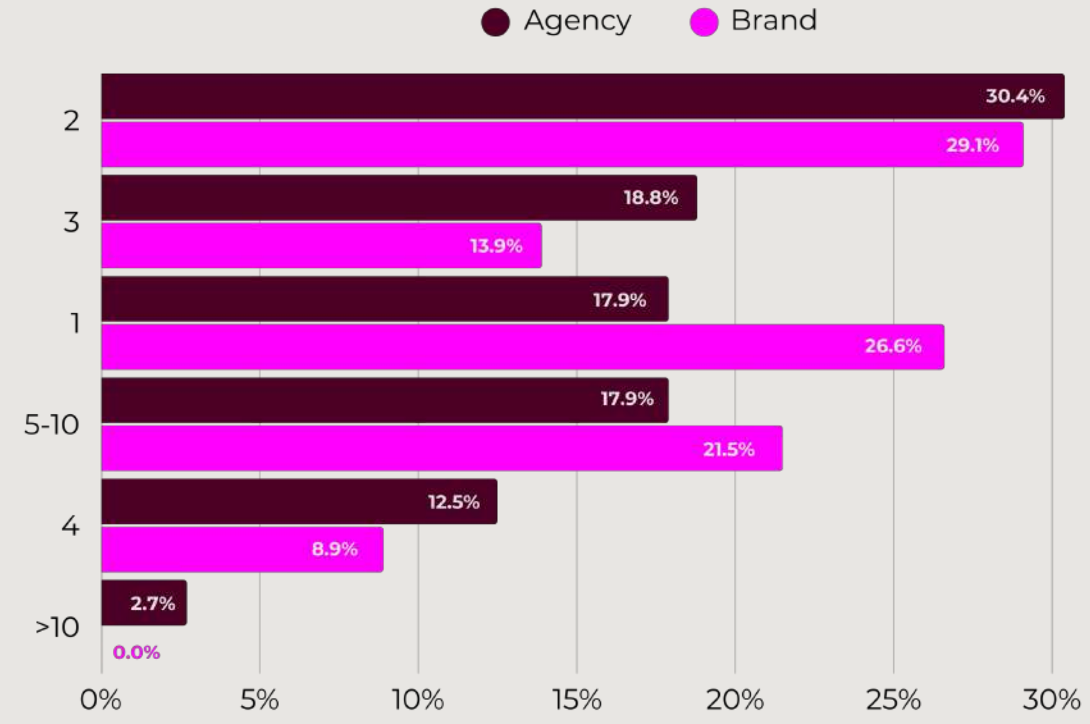
This again emphasises the current reliance on technology for social listening. For some, SITech IS social listening, so investing in technology is put above investing in upskilling people. This was also reflected in leadership's responses to this year's survey: 73% are planning to invest in technology while only 54% are planning to invest in people. And we can see how this focus on tools plays out in some of the methods and processes practitioners are using. But more about that in the next section.

THE RESULTS

2024/2025



AGENCY & BRAND

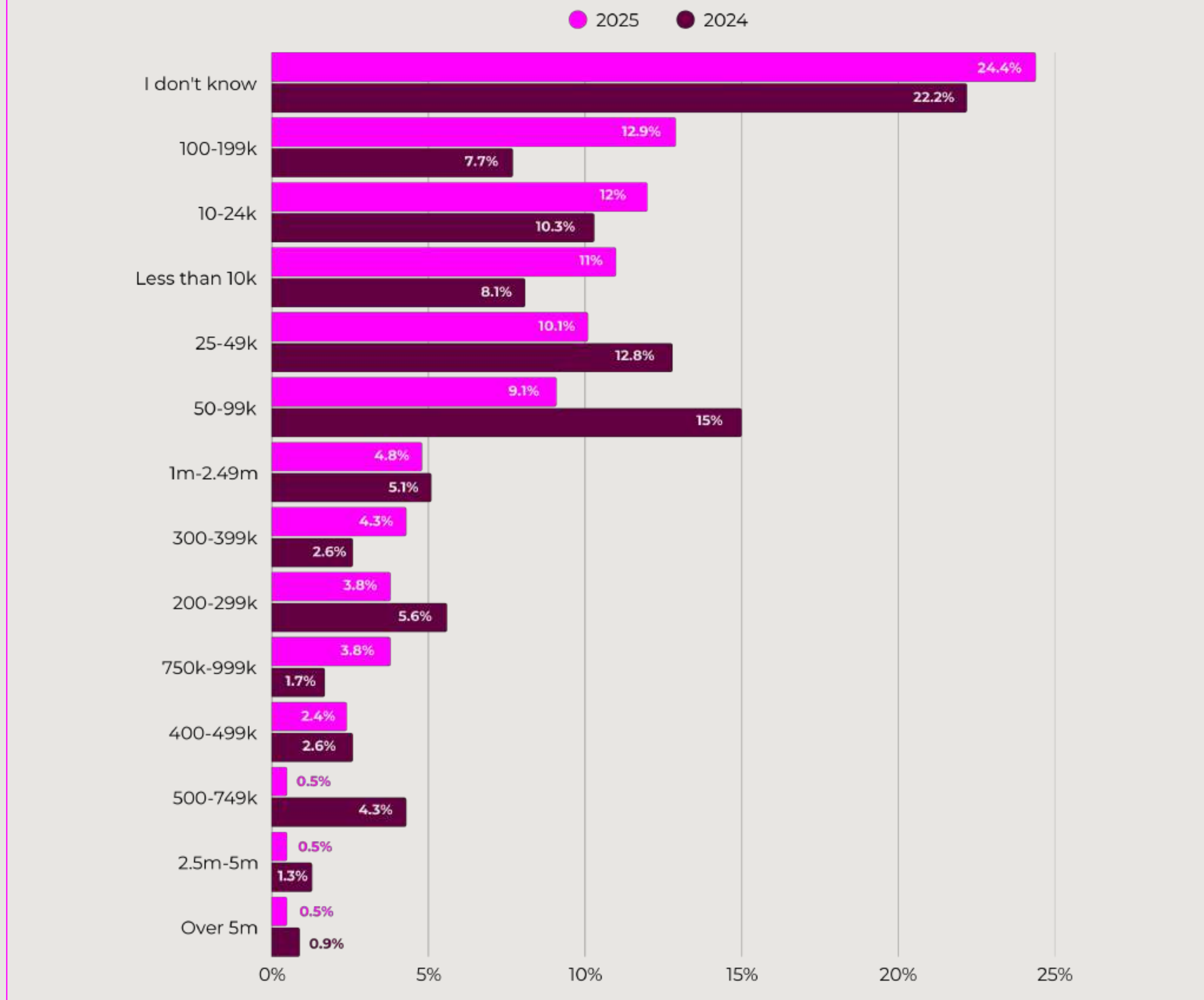


The top ten most commonly used tools

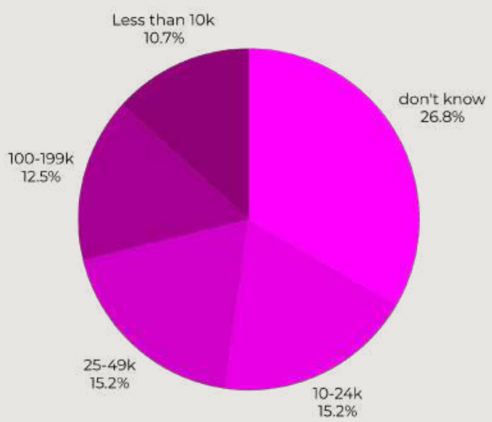
2025	2024
1. Talkwalker (32%)	1. Brandwatch (34%)
2. Sprinklr (27%)	2. Sprinklr (28%)
3. Brandwatch (26%)	3. Talkwalker (27%)
4. Meltwater (12%)	4. Meltwater (15%)
5. YouScan (10.5%)	5. Audiense (11%)
6. Quid (8%)	6. Quid (9%)
7. Audiense (7%)	7. Synthesio (8%)
8. Sprout Social (5%)	8. YouScan (7%)
9. Synthesio (3%)	9. Visibrain (5%)
10. Visibrain (3%)	10. ViralMoment (5%)

Whilst there hasn't been much change in the companies featuring in the top 10, there's been a bit of a reshuffle in the order. This could be reflective of some of the consolidation of the industry that's taken place over the last year (for example, Hootsuite's acquisition of Talkwalker).

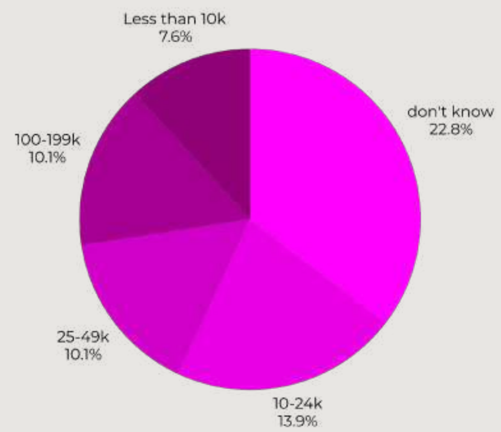
How much do you currently spend (US $) on social data tools each year?



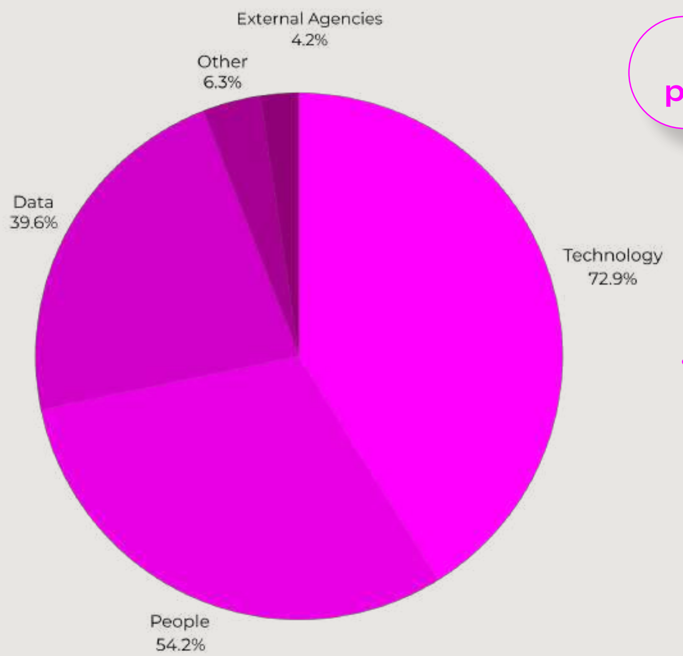
AGENCY TOP 5



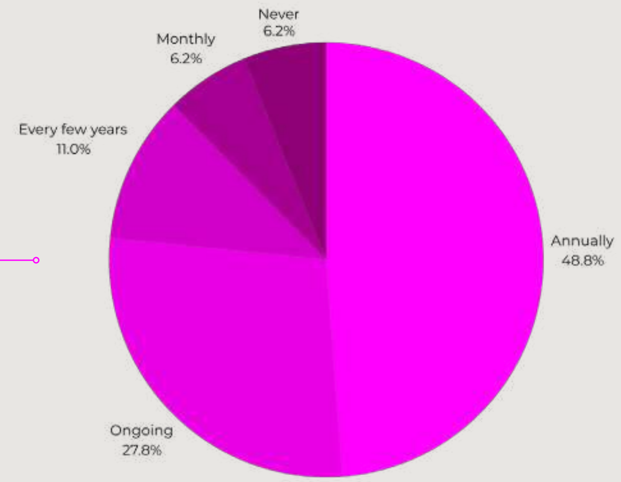
BRAND TOP 5



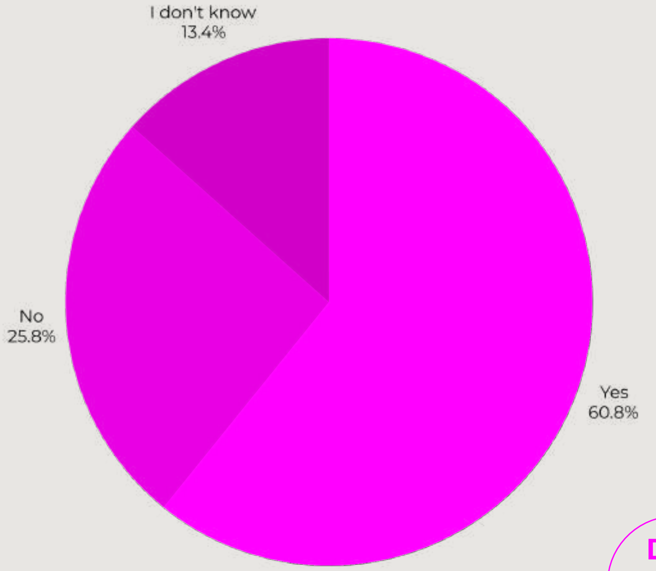
What area of social listening are you planning to invest in? (Leadership only)



How often do you review your social listening tech stack?



Do you have a process to compare the different options when choosing new tools?



When it comes to the process, several referenced doing audits of their current tech to find gaps or underused tools and to understand the needs of the wider business.

"Audit across needed features, areas we would like to see improvement, new areas of research, then demo and review internally."

"We do an annual audit of enterprise social listening tools and also specialty tools (video social listening, trends tools, etc.)"

Many reference requests for proposals (RFPs) and requests for information (RFIs). Within this, they have a list of requirements around the tool: functionality, data sources, data volume/ user numbers, UX, integration with other tech, legal/ privacy protections etc.

"We would conduct a formal RFI or RFP to compare tool capabilities. We also participate in LOTS of capabilities presentations throughout the year to stay on top of new tool developments."

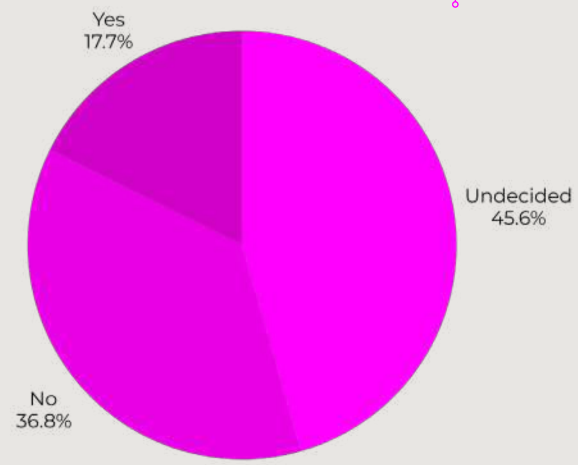
"Go to market RFP with pre-agreed list of vendors - AI capability, Data Sources and Tracking Methods are our top priorities wihtin this process"

The final stage for most, is demo-ing the tools that meet their criteria. This might include getting multiple people across the organisation to try them, and then score them against the requirements to compare.

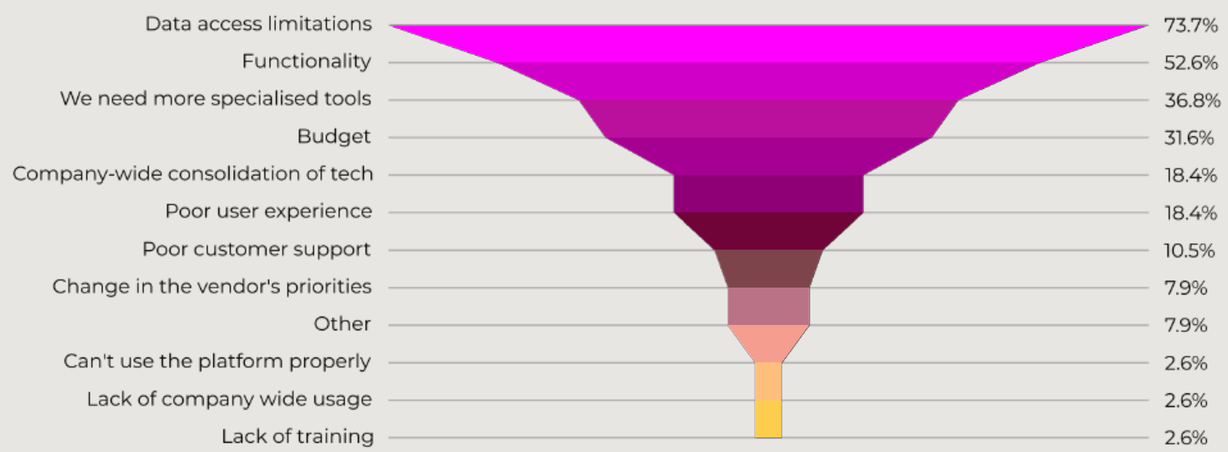
"All members of the team test the tool for different use cases and give an overview afterwards"

"We do demos and trials and test a similar use case across multiple tools"

Are you planning to change any of your current tools in the next 12 months?



For those planning to change tools, why?



Process

Exploring processes and methodologies

One of the clearest insights to come out of this section of the survey is the conflict between what social listening practitioners want to be doing with social data, and what they're actually doing.

There's a growing understanding of the value of social data beyond metric-based use cases as those around strategic innovation and audience understanding are on the rise. This suggests a more mature approach to social listening. However, when we look at people's objectives for doing social listening, and the use cases they're working on, there's a mismatch.

Whilst the objectives tend to be more strategic, the main use cases don't reflect this. Particularly within brands. Here, their primary objective is cultural and societal trend analysis, but their main use cases are competitive benchmarking, crisis detection & response and brand health tracking.

It's unclear whether this gap is because practitioners want to (or feel they should be) using social data for more strategic use cases and can't because the business expects them to focus on more tactical ones. Or, whether it's because they're unsure how to use social data in this way.

The reality? Probably a bit of both.

We'll dig into the first point more in the next section. But, when it comes to a potential skills gap, many of the respondents aren't drawing on some of the more complex methodologies for social data analysis. For example, only a very small percentage are using discourse & semiotic analysis or predictive analytics & forecasting. Even fewer are using computational social science. This is true across the board, for both agencies and brands.

Likewise, when it comes to methods used, the most popular are trend & volume analysis, sentiment analysis and keyword & hashtag tracking. Very few people are using grounded theory or predictive modelling.

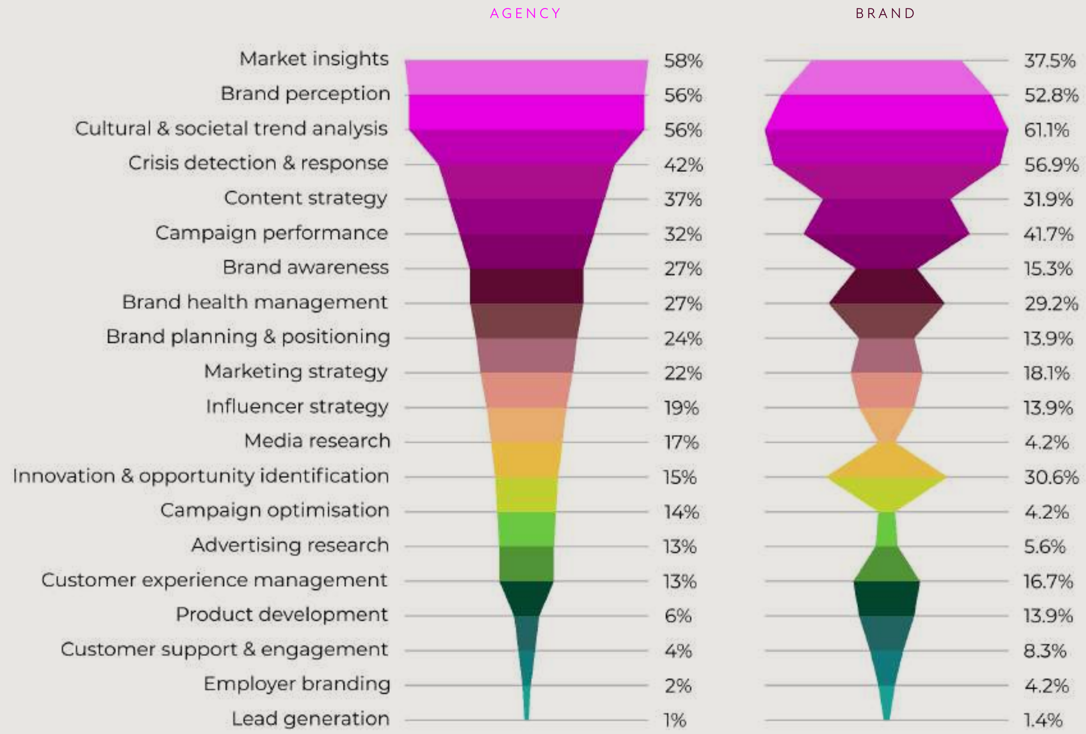
This might be down to a lack of confidence in using these methods. However, when asked about their challenges around analysing social data, only 6% referenced a lack of skills. It's more likely a lack of knowledge of these methods - they're unaware they don't have the skills - which makes sense given many social intelligence practitioners are self-taught. This is also emphasised by the fact that a higher percentage of respondents than in 2024 rarely or never analyse social data outside of their social listening tool.

Again, this shows an increasing reliance on technology to guide the work.

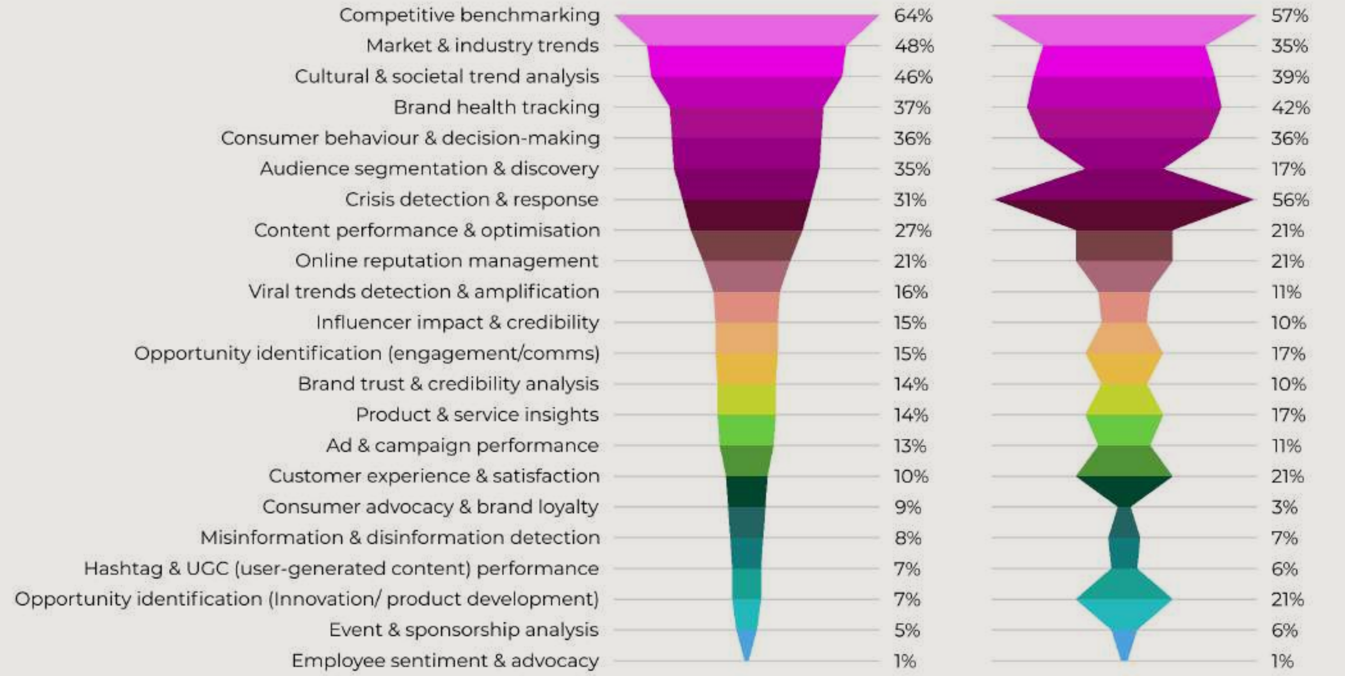
We can argue that technology is becoming more accurate at dealing with complex problems. But, there's a danger that, if we farm out the critical thinking element of social intelligence, then all that's left is button pushing. And that makes us dispensable.

THE RESULTS

What are your primary objectives for analysing social data?

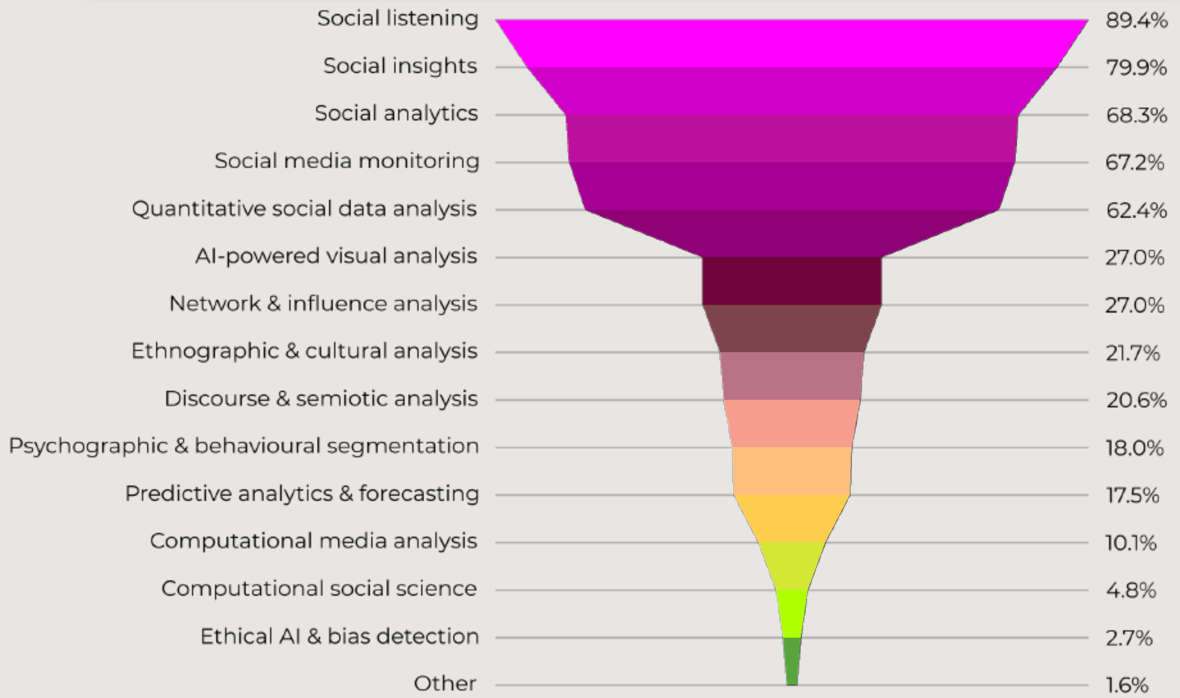


What are your main use cases for social data analysis?

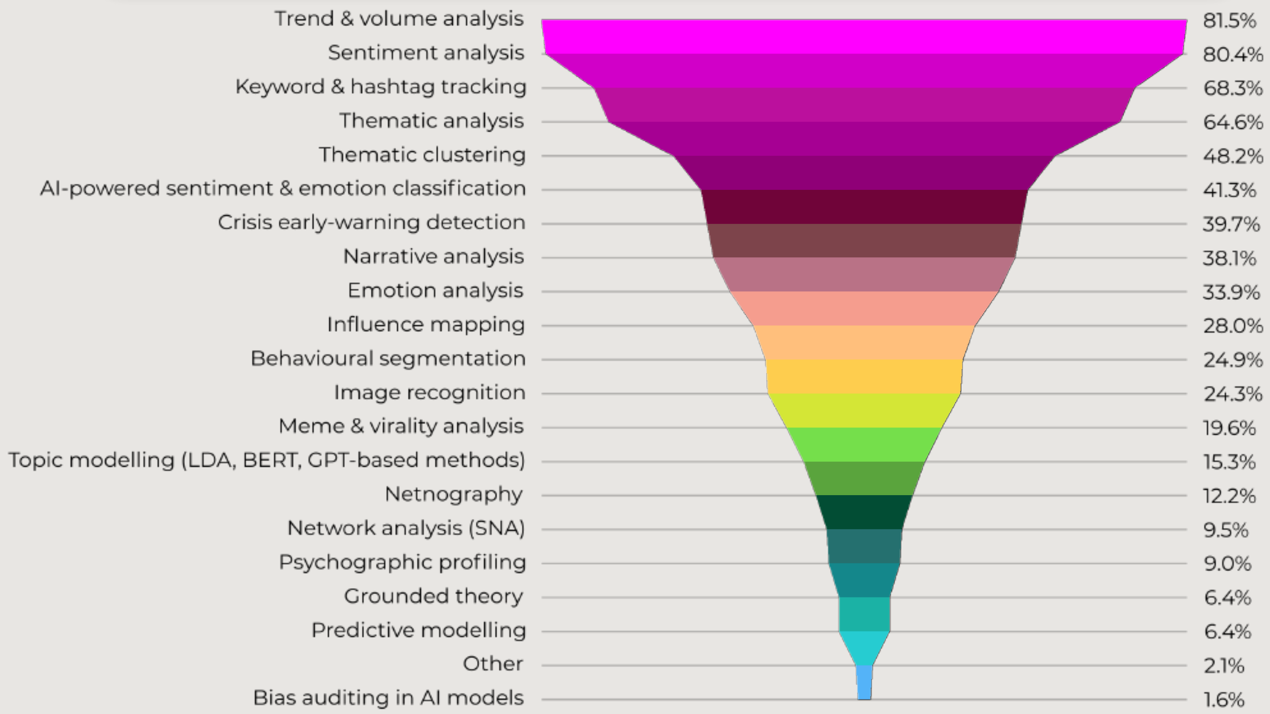


*The responses to these two questions show the mismatch between what people would like to do with social data (or what they think they should be doing with it), and how they're currently using it.

What methodologies do you use when analysing social data?

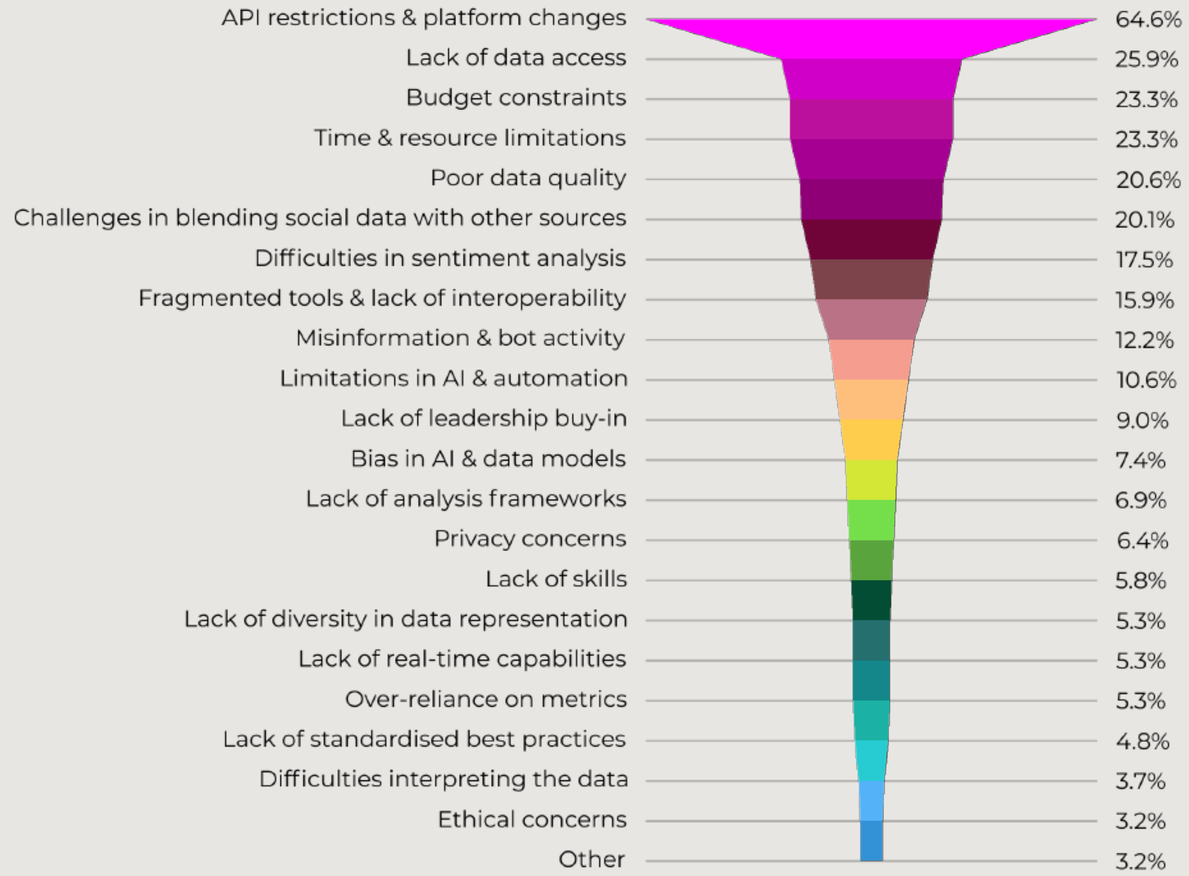


What methods do you typically use when analysing social data?

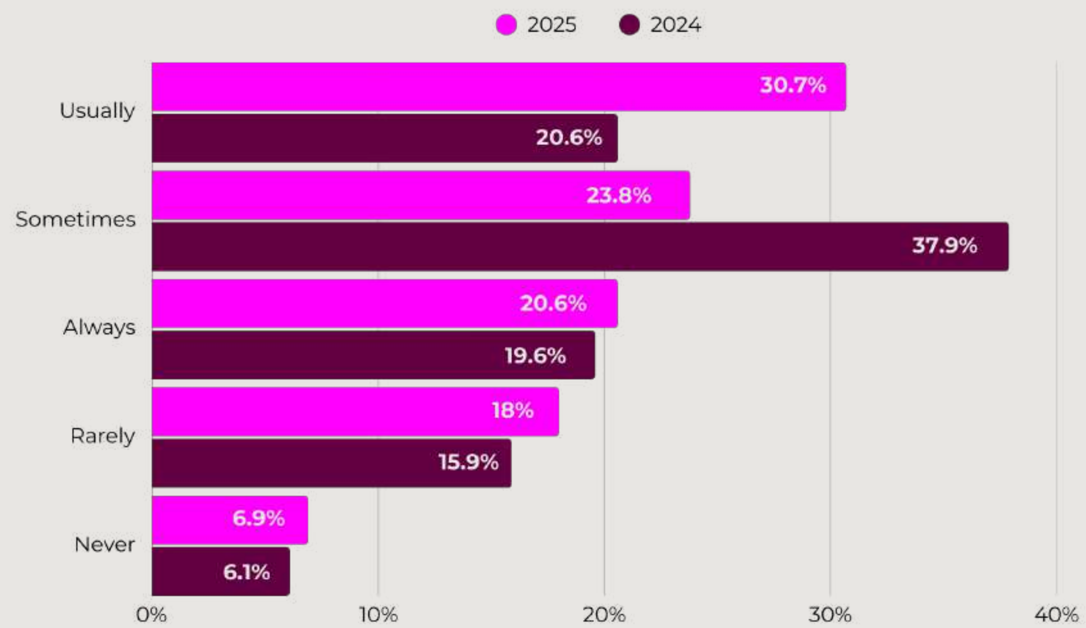


The majority of respondents are relying on more basic techniques of social data analysis, suggesting there is a skills or confidence gap between what they want to be doing, and what they are doing. Based on the answers to the following question, however, it's more likely a **knowledge gap**.

What are the main challenges you face when analysing social data.



How often do you export social data from your social listening tool and manually analyse to find insights?



When explaining how they manually analyse data, many people talked about coding their own models for analysis, exporting data to Excel or manually going through posts directly within the data source itself.

"I have trained a models which seek out specific behaviours to paint a picture of B2B influence"

"Pivoting in Excel often allows segmentation impossible or difficult to do in platforms. Also allows using different word cloud generators and importing into data visualisation tools etc."

"Manual coding in the native language by humans in the market so they understand context and cultural relevancy."

However, some people are still relying on the embedded functionality of different technologies to do much of the analysis work. For example, several referred to manual processes within the social listening tools they use.

"Manually tagging posts in the rare case that the sample of posts is low or the tool is unavailable."

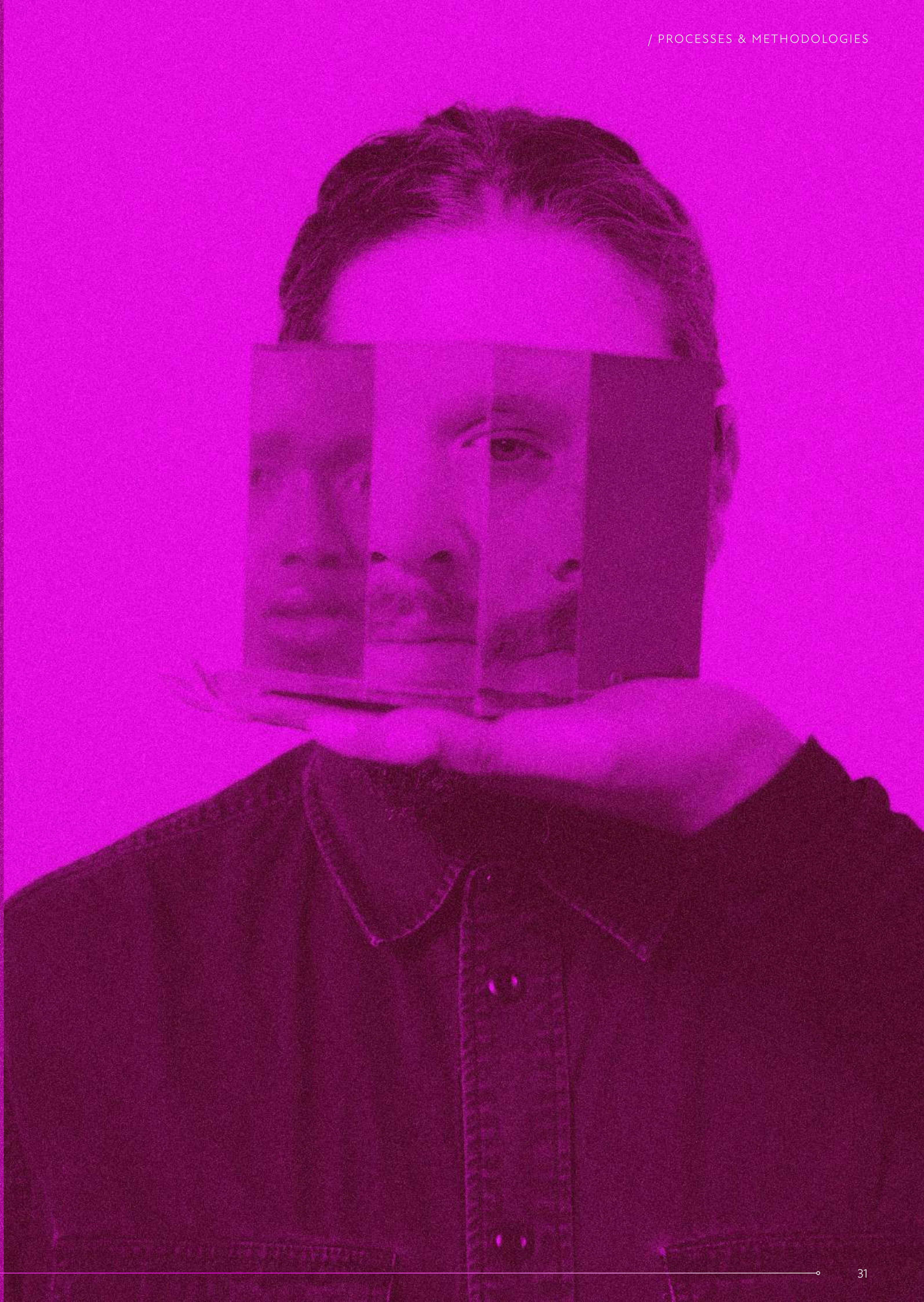
"Scan through mentions within the social listening tool."

Others referred to using the analytics functions that are native within the social media platforms themselves.

"Native social tools, they have significantly better data than any social listening/analytics tool I've used in over 10 years - and they're free."

And some swap one tool for another.

"Integrations with PowerBI for more bespoke data visualization"



Culture

Understanding organisational culture around social intelligence

When we dig into the results from this section of the survey, we see two different stories. On the one-hand, those working in agencies are seeing greater buy-in from the wider organisation where 30% say social listening is considered in every decision. This is supported by senior leaders in this year's survey - more than 50% of the respondents from agencies were also in leadership positions. Almost half (45%) believe senior leadership think social data is extremely important for achieving business objectives, and 63% say social listening is a priority for investment.

On the other hand, practitioners in brands are still struggling with buy-in. Just 10% of those who answered the survey believe social listening is considered in every decision, and just 26% of brand respondents were in positions of leadership. The lack of senior social listening leaders within brands hints at a bigger issue: that in many organisations, it isn't seen as a strategic function that requires a dedicated leader.

This is also reflected in where the social listening function sits within different organisations. Within brands, it is most commonly located within marketing or social media teams. They also work more closely with marketing or PR & Comms teams. This suggests the view of social listening in-house, is seen as a more tactical tool to support other teams. It's focused on measurement and providing data to back-up short term projects, as reflected earlier in the most common use cases.

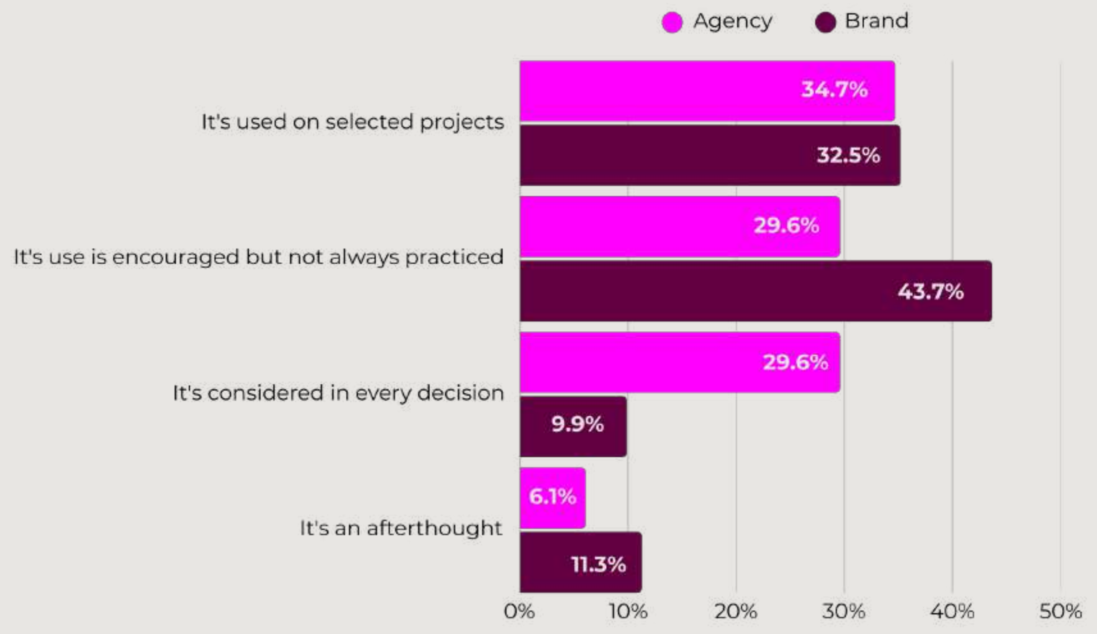
In agencies, however, the social listening function is more likely to sit within research & insights teams or as its own dedicated team (or the entire agency is focused on social data). And when we look at the work they're receiving from clients - brands - it's more likely to be deep consumer insights work. This has changed compared to 2024, when the majority of outsourced work was dashboard creation and project set-up. In 2025, the work agencies are doing is more strategic. Again, this was reflected in the difference in use cases between agencies and brands in the last section. The reason this type of work is being outsourced by brands is because their teams are too small or they don't have time, which highlights where the priorities of brands lie.

The question is, are practitioners within brands happy with the work they're doing? Or are they forced to focus on more tactical projects rather than strategic work because that's where leadership believes the value in social data lies?

Given where they're located in the org chart, it would suggest the latter. But, at the same time, the lack of buy-in that brand social listeners are experiencing suggests leadership isn't feeling the value. This is further emphasised by the fact that 56% of in-house respondents to this year's survey find it difficult to demonstrate the impact of their work on the company's bottom line. Maybe that's because the value of social data is fundamentally misunderstood by many business leaders, yet they're the ones making decisions about its role in the company.

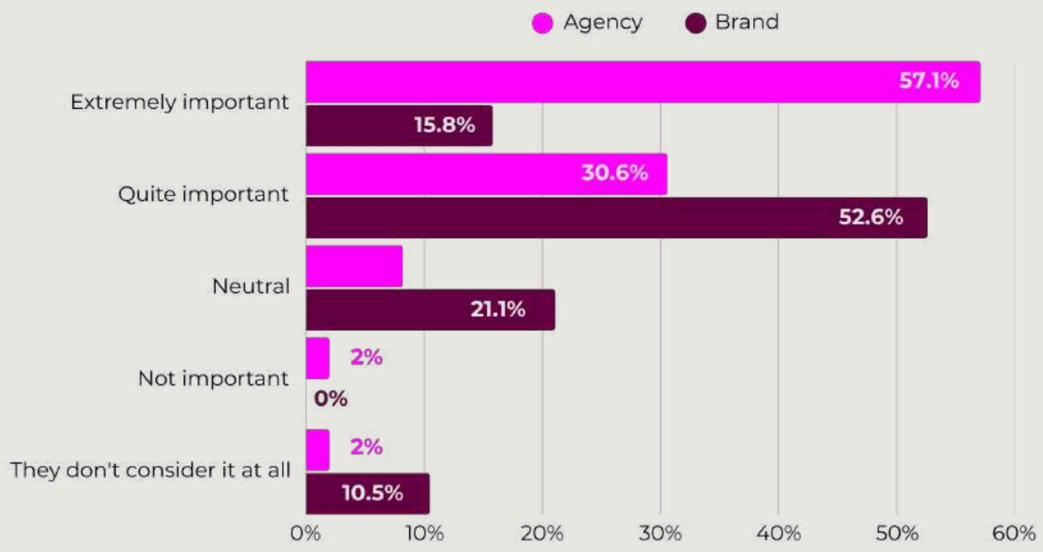
THE RESULTS

What role does social listening play in the company?

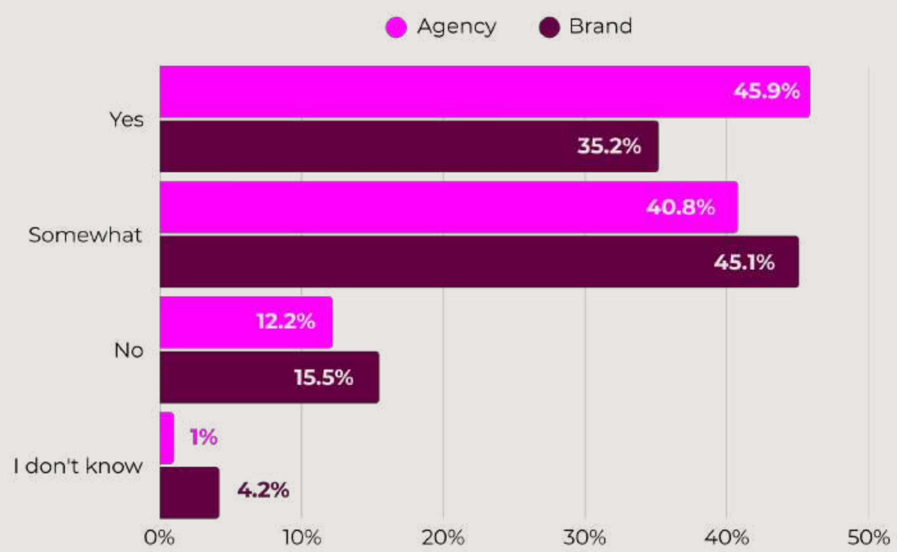


How well established is your social listening programme?

How does senior leadership in your organisation view social data in terms of achieving business objectives? Leadership respondents only

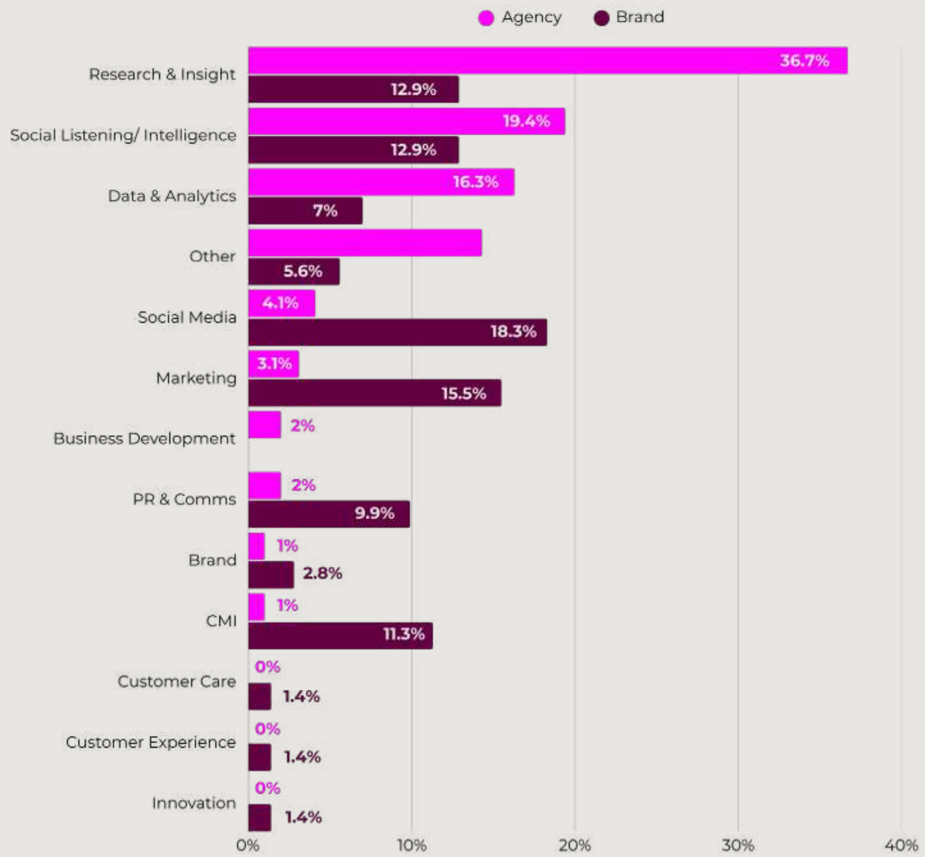


Is there a consistent approach to analysis shared across your team?

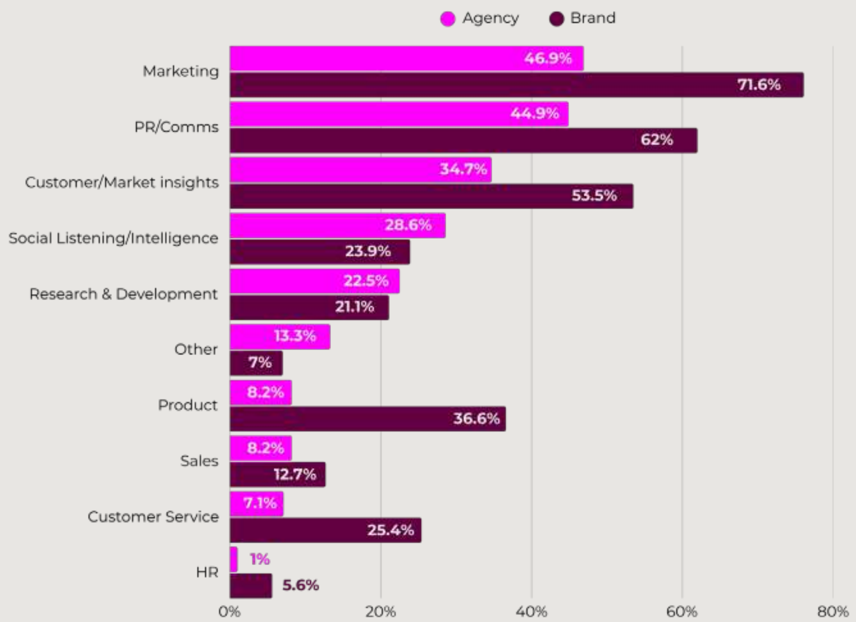


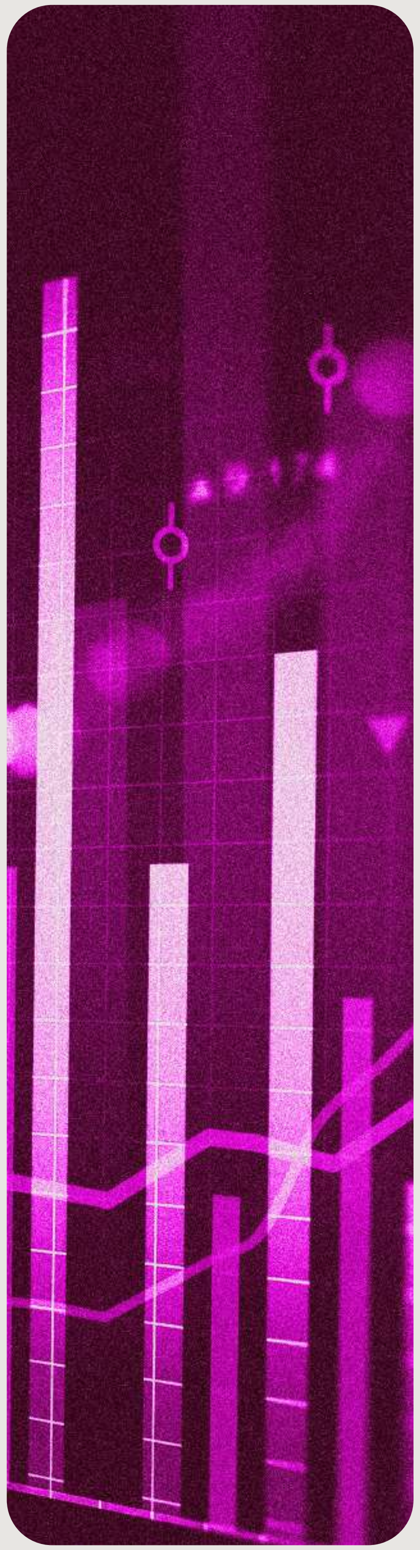
These results seem to show that, in general, those within agencies are more confident in their work and the position of social listening within their organisations: they're more likely to feel that it plays an important role, to have an advanced programme set up, and to have a consistent approach to analysis shared across the team.

What department does the social listening team sit within your organisation



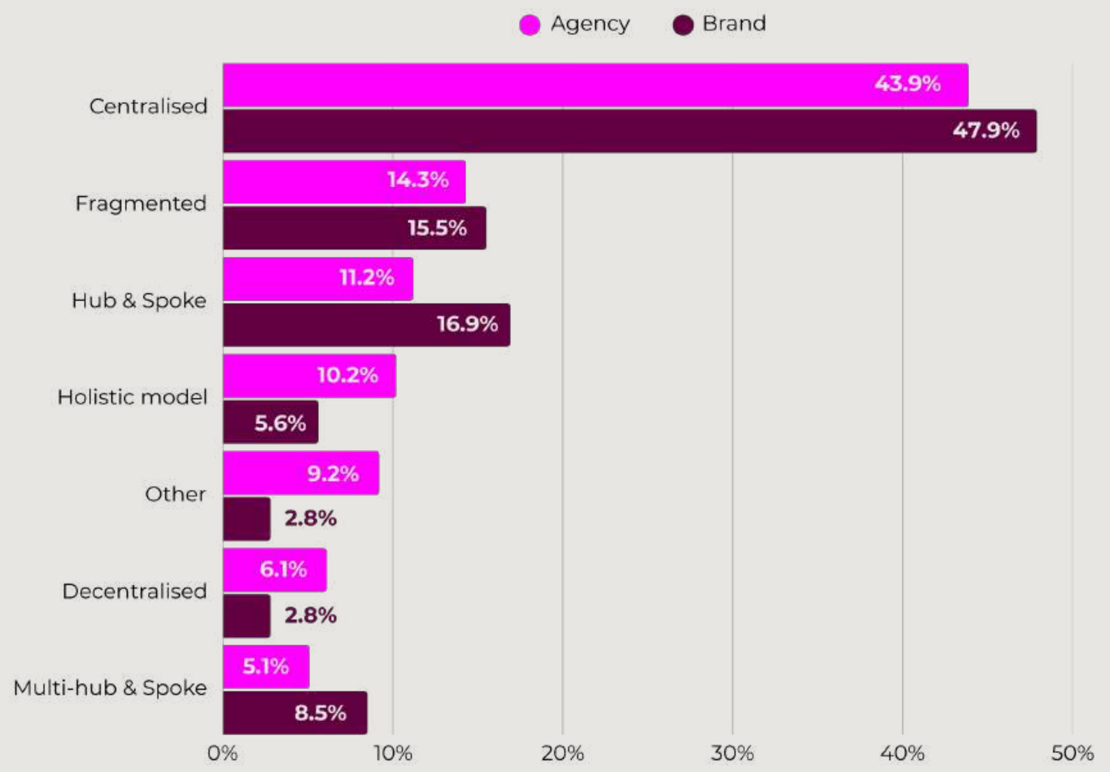
Which departments do you work most closely with?





These responses show that within agencies, social listening is more likely to be considered a **strategic** function based on the departments it works in and with. In brand, however, it's more likely to play a **tactical** role.

How is your social listening capability organized or managed?



Centralised:
One central team manages all social listening capabilities and distributes insights to end users and stakeholders

Fragmented:
Efforts bubble up from all areas of the organisation

Hub & Spoke:
A cross-functional team sits in a centralised position and supports various nodes such as functional teams or business units

Holistic model:
Everyone in the company has access to generate their own social listening insights via a common user license and access

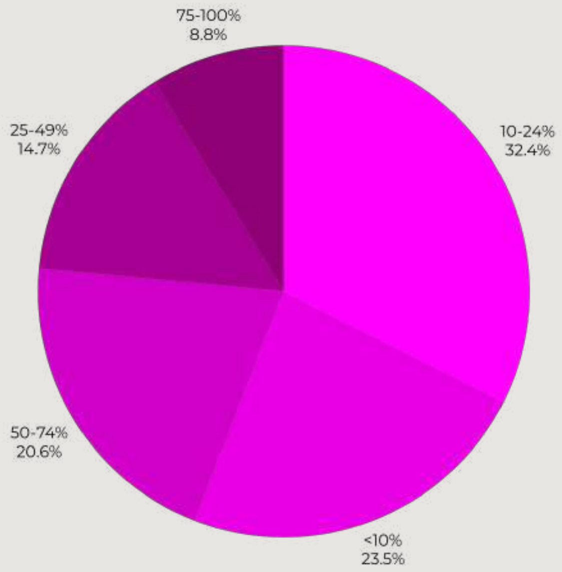
Decentralised:
No one department manages or coordinates social listening

Multi-hub & Spoke:
Similar to hub and spoke but applicable to multinational companies where entities act autonomously from each other under a common infrastructure

There is a higher percentage of brands where the social listening function is set up in a hub & spoke model. And while this suggests an organised approach to managing social listening, particularly across large organisations, it could also isolate the social listening team from the majority of the organisation. In this model, they're more likely to work with a few people in select teams, so the work of the social listening team could be missed.

47% of brands are outsourcing their social listening projects to third-party agencies or consultants. Of them, almost a third are outsourcing 10-24%.

What percentage of the work would you say you outsource?

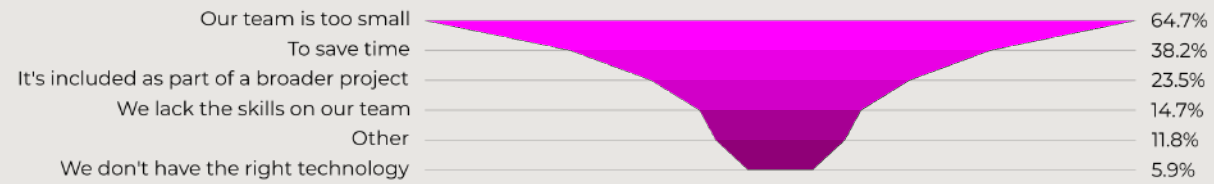


These are the five main types of projects they're outsourcing:

Work being outsourced by brands	Work being requested from agencies
1. Deep consumer insights	1. Ad-hoc or one-off projects
2. Ad-hoc or one-off projects	2. Deep consumer insights
3. Dashboard creation	3. Frequent brand reporting/ measurement
4. Frequent brand reporting/ measurement	4. Consultancy support
5. Project set-up including query creation	5.Project set-up including query creation

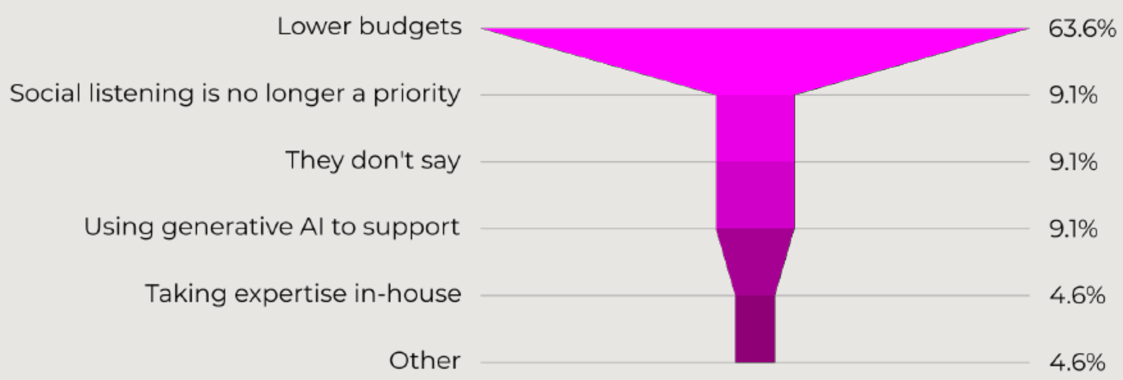
The type of projects brands say they're outsourcing, matches the type of projects agencies are receiving.

Why are you outsourcing this work? Brand only



50% of agencies have seen the volume of work they've received over the last 12 months increase while 20% have seen it decrease.

What is the most common reason your clients are giving for reducing workloads? Agency only



Is social listening a priority for investment? Leadership respondents only

For those that say it's no longer a priority, **some of the reasons mentioned include:**

- Cost (mainly tech related)
- Budget restrictions
- No longer valued by the organisation/ clients

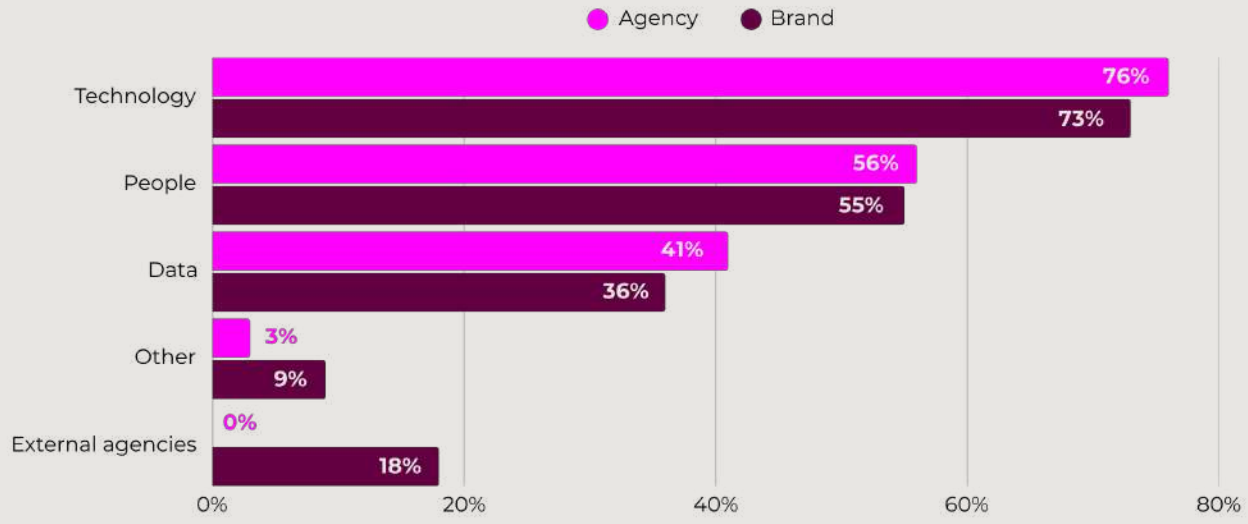
"In current times with budgets tightening and everything focused on core business - it's move to a nice to have vs essential resource."

"Leaders often struggle to quantify and articulate the ROI of hours spent on social listening"

"Not part of the culture - a massive need to change the culture of the company to make moving the needle"

"it is for us, but not for our clients :("

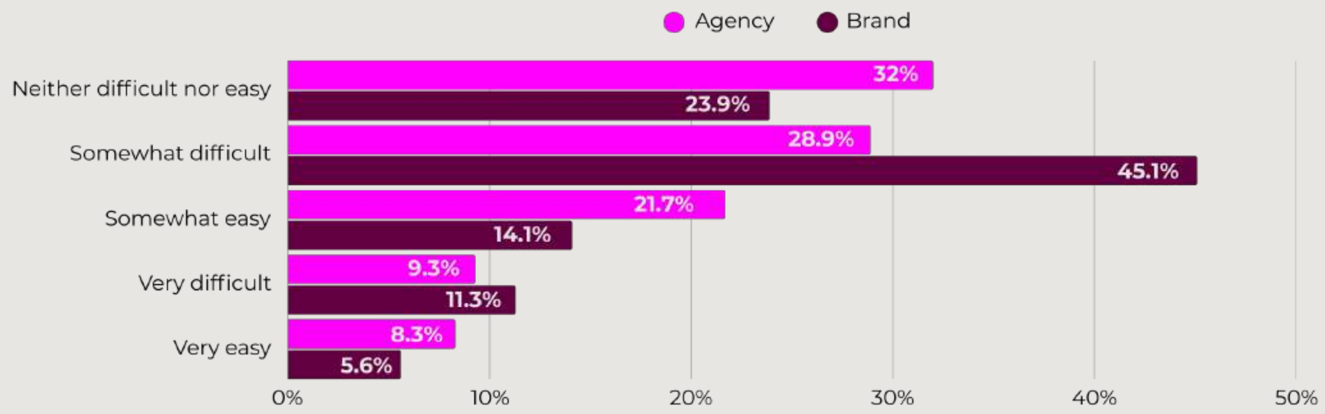
What area of social listening are planning to invest in? Leadership respondents only



When it comes to the top five factors that are most restrictive in terms of getting the most out of social listening, the responses between agencies and brands are similar. The only difference is that brands lack understanding from senior leadership, which is unsurprising given the previous results.

Agency	Brand
Budgetary issues (46.4%)	Data accuracy/ quality (39.4%)
Data access (41.2%)	Budgetary issues (35.2%)
Data accuracy/ quality (30.9%)	Data access (31%)
Lack of organisational-wide vision for social listening (25.8%)	Lack of organisational-wide vision for social listening (23.9%)
Inability to demonstrate ROI (23.7%)	Lack of understanding from senior decision-makers (22.5%)

How easy is it to demonstrate the impact of your work on your company's bottom line?



Gen AI *

Gauging the impact of genAI on social listening

It's been hard to ignore the rise of genAI across all industries, including social listening. So, this year, we decided to go deeper into how genAI-based technology is changing the way social intelligence practitioners are doing their work.

In general, the vast majority of respondents see the prevalence of genAI as a good thing. Around 94% of people are using it in their work in some way, 91% are using AI-powered tools for social listening or data analysis specifically, and over 82% believe it will enhance their work, rather than replace human analysis. There's currently very little fear that they'll be out of a job anytime soon.

This is because genAI is still seen as taking on the role of a junior team member, taking on time-consuming, but useful, tasks such as data summarisation, query writing support and first-pass data analysis. Interestingly, within brands, a high percentage (47%) are using it for insights generation. How accurate the results of this are is unknown, but there's a risk that by using technology to do the type of work that humans are more suited to, they're more likely to make themselves replaceable in the long-run.

Despite the increased use of genAI in day-to-day work, the level of trust is still fairly low. Only 3% fully trust it (probably quite rightly) while the majority find it useful but that it still requires extensive human oversight. To overcome this, most people are manually validating the work that genAI does.

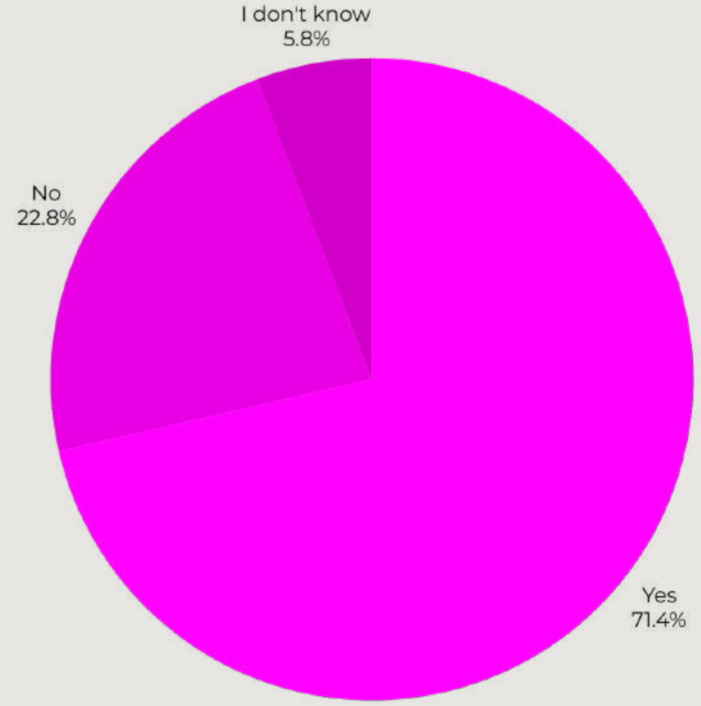
When it comes to whether genAI is changing the quality of the data, 61% believe it is. When asked how it's changing it, there was a split in how people interpreted this question. Some people considered how it's changing the raw data that they're seeing: online posts, comments, content themes etc. These people saw the impact of genAI as more negative. They've noticed more spammy content, less authentic voices and a distortion in general sentiment due to an overindexing of genAI content. Other people considered the impact of genAI on how they're working with data in their social listening tools, and saw it as a more positive change. The referenced how it helps to make collecting, cleaning and processing data easier.

This split shows the difference in how people view data. On the one hand, there are those that consider data in its raw form: out in the wild with all the context that adds. On the other, there are those that see it as a data set to be processed in isolation through a tool. And each perspective has the potential to lead to different insights.

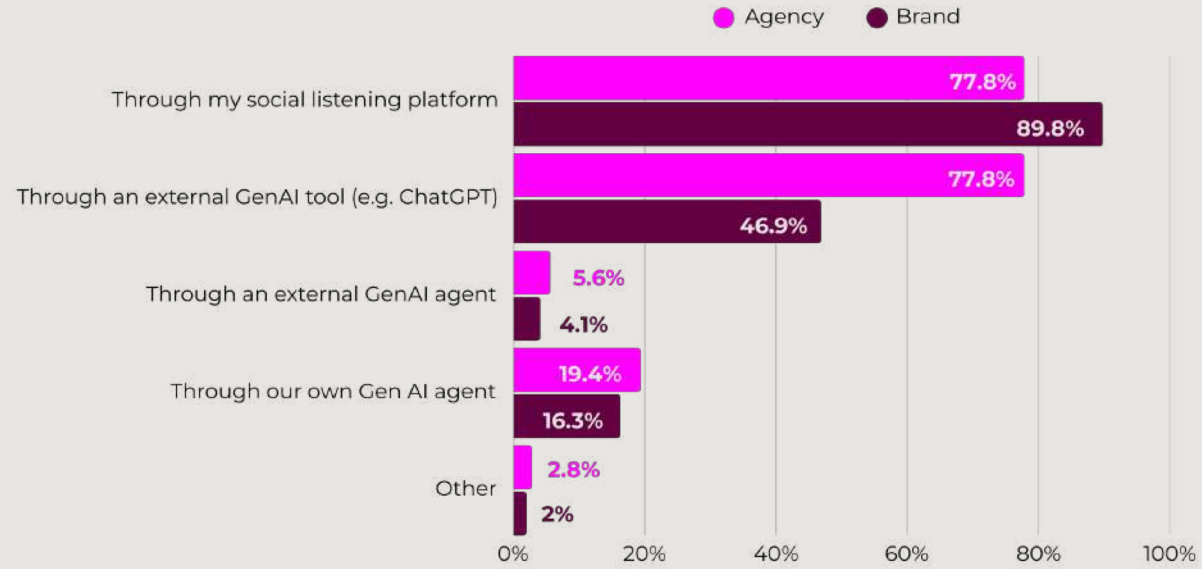
Overall, the increased use of genAI is undoubtedly changing the work of modern social intelligence professionals. Because technology is taking on entry-level type jobs, the fundamental skills that new practitioners in the space need are changing. While learning to use new technology can improve our work and increase the value we bring, we need to use it properly because relying on it will further the argument that humans aren't needed.

THE RESULTS

Are you using generative AI to help you analyse social data?

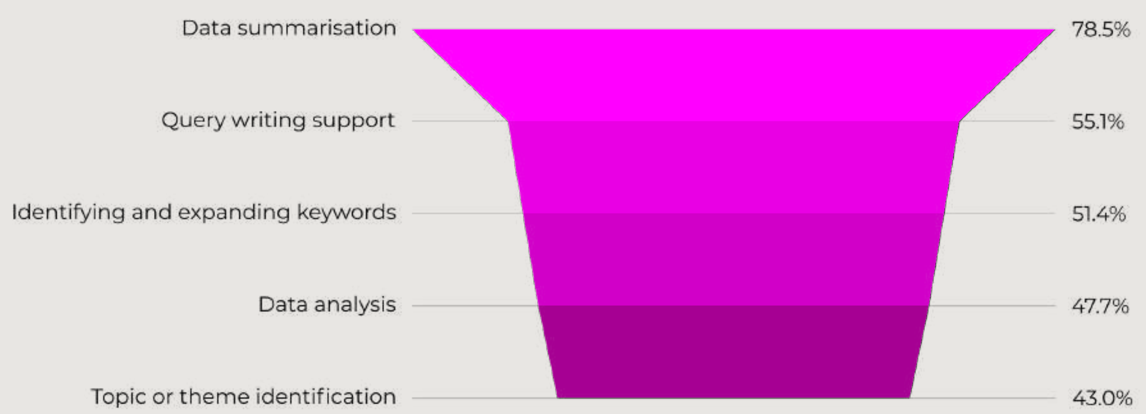


How are you using it?



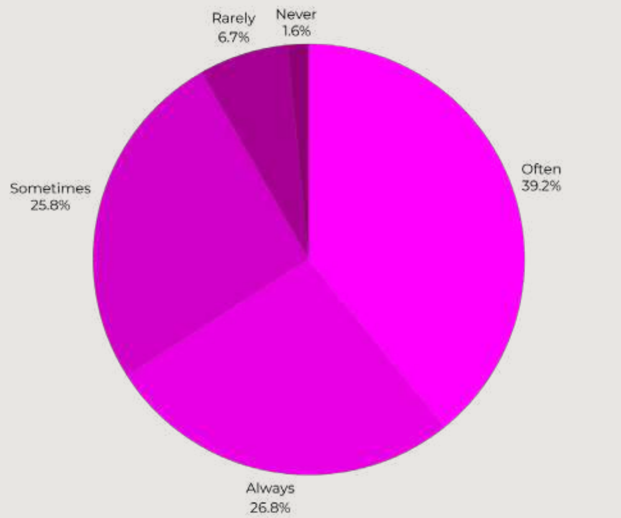
Around 17% of respondents are using their own genAI agents - the proportion is similar across agencies and brands. This shows there is an interest in creating more tailored genAI support than can be gained through mainstream tools and more generic genAI features in social listening platforms.

What activities is generative AI helping you with in social listening? (Top 5 agency)



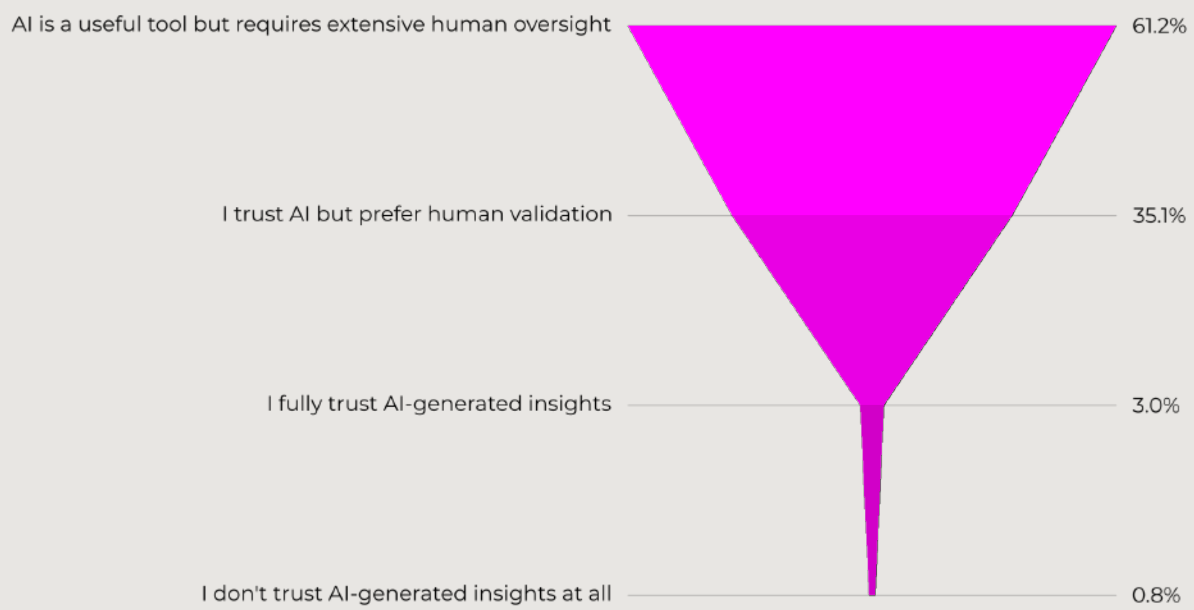
What activities is generative AI helping you with in social listening? (Top 5 brand)

How frequently do you use AI-powered tools for social listening and data analysis?



When asked about the genAI tools they're using, some of the most referenced ones were **ChatGPT/ OpenAI, CoPilot, Perplexity and Gemini**. Several mentioned the genAI features within some of the social listening platforms themselves, but it seems more typical that people are using external genAI tools more, or at least in addition.

How much do you trust AI-generated insights compared to human analysis?



When explaining their process for validating the main approach is manually checking the reponses that are provided and cross-checking them with the results to make sure they're true.

"Cross checking AI generated analysis with the consumer comments to identify irrelevant/ inaccurate insights

"Spot checking data to ensure accuracy with raw mention data."

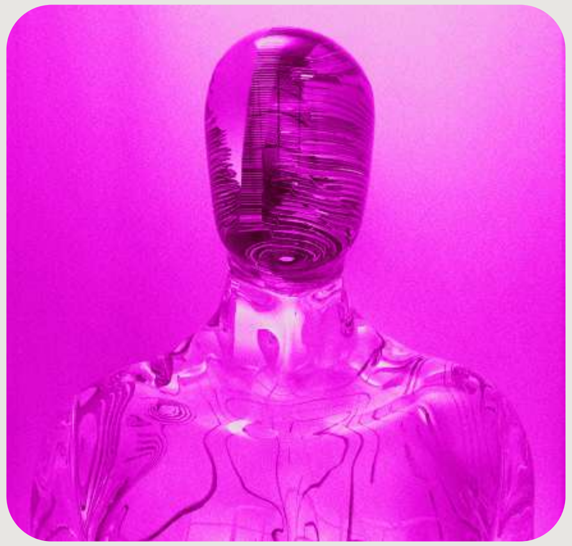
"We cross reference with the insights from CMI team and compare with the list of results and human analysis too."

Others are attempting to ensure more accurate results are generated at the prompting stage.

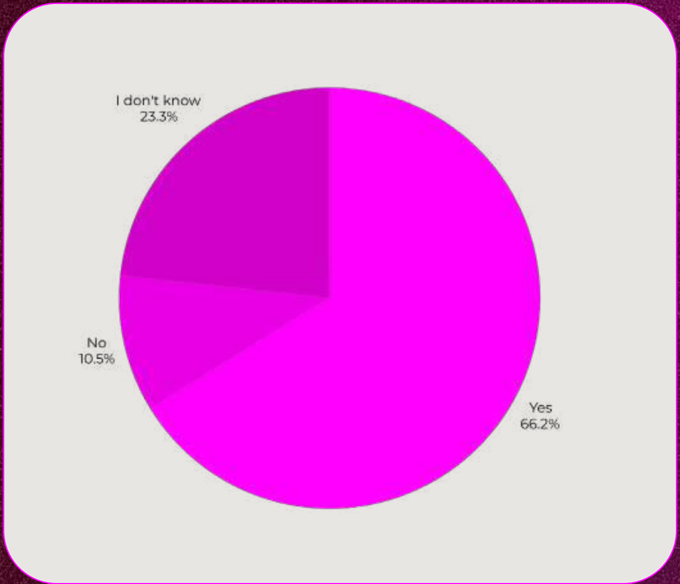
"Typically its not doing the whole work for me and I sense check all the results - I'm constantly refining reusable queries as well."

"Ask additional questions and verify"

"Provide different queries and make A-B tests"



Do you think generative AI is changing the quality of the data you're working with?



When asked in what way it's changing, there was a mix of responses as people interpreted the question differently. Some people understood it as referring to the raw data - the posts, comments, articles etc being shared online. These people generally felt genAI was changing the quality in a negative way.

"Interfering with social output in real time both directly and indirectly via influencing real people's opinions at scale"

"More bot content, change to memes, authenticity questions"

"More junk content, less human content."

"AI slop makes social media listening less useful, and suppliers need to come down with their prices to reflect that."

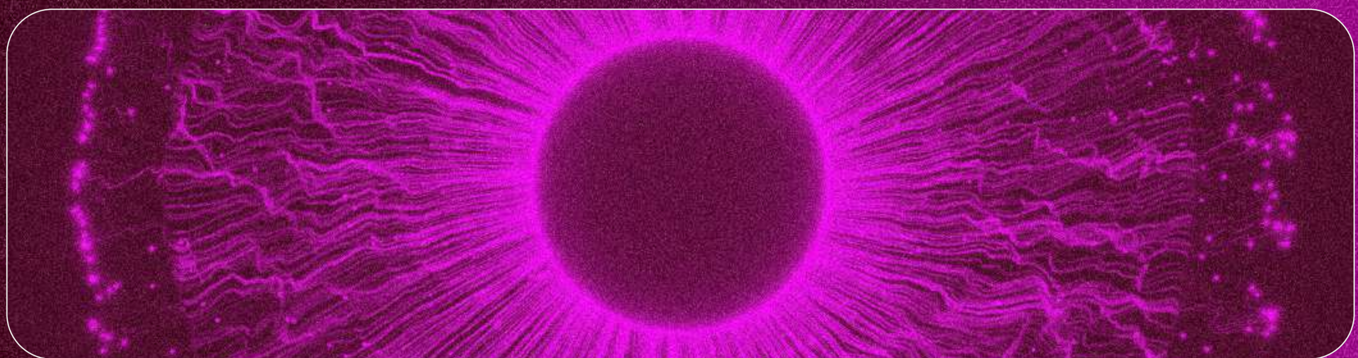
Other people interpreted the question as how genAI can help them improve the quality of the data they're getting, by cleaning, analysing, summarising etc. In general, these people saw it as a positive thing.

"it adds analytics capabilities and time saving"

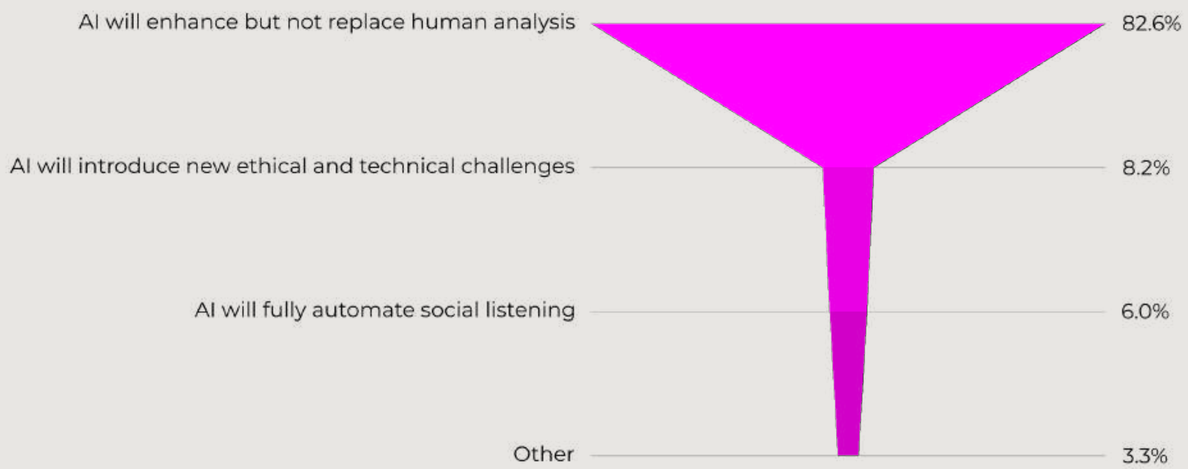
"Making the data richer with better querying and summarising"

"Accuracy improves significantly. Models around sentiment and other NLP rely heavily on learning (what's right and wrong) and over time these models have gotten better. AI has exponentially increased that..."

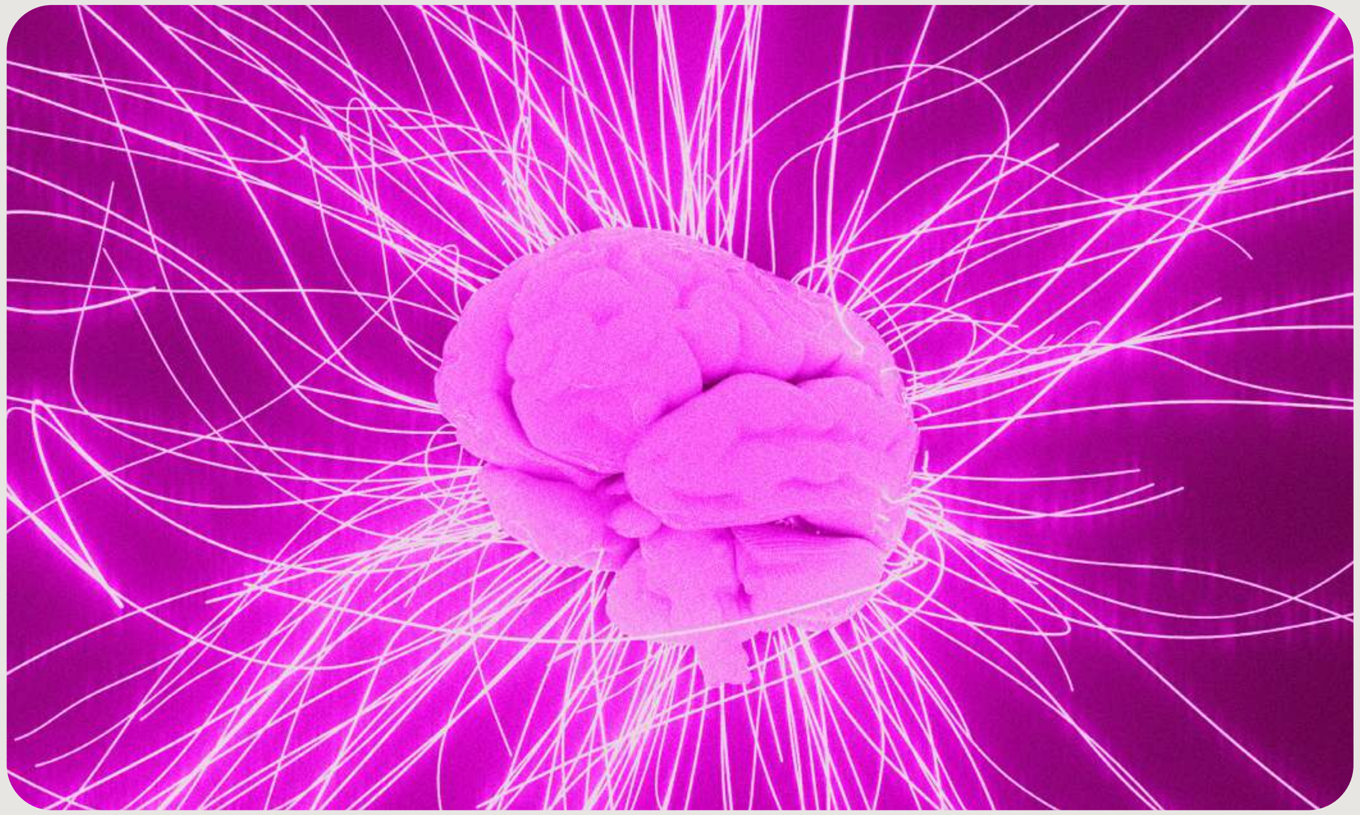
"Very helpful in query building and analysis."



In your opinion, what is the main way AI will impact social listening in the next 5 years?



In general, people are optimistic that genAI will enhance their role, rather than threaten it.



A word from our sponsor

It's remarkable to observe how the Social Media Intelligence (SMI) market has accelerated in recent months, transitioning from a relatively mature and stable environment into a dynamic space characterized by rapid innovation and an influx of new technologies and players.

For years, the market appeared to stagnate, with a few dominant platforms consolidating their positions and converging in terms of functionality and performance. Most insights were derived from text analysis (eventually supplemented by image recognition) leading to marginal differentiation across tools.

Now, two major technological shifts are reinvigorating the space:

- **The integration of advanced AI algorithms**—not just to support traditional search mechanisms, but increasingly as core engines powering query generation, data structuring, and insight extraction.

- **The emergence of new capabilities for analyzing previously untapped media formats**, particularly audio, video, and podcasts.

These developments are reshaping both the capabilities of SMI platforms and the operational models of the teams that rely on them. On one hand, AI-driven automation boosts productivity by streamlining tasks such as query creation and preliminary data interpretation. As the survey reveals, around 17% of respondents are using their own genAI agents - the proportion is similar across agencies and brands.

On the other, the inclusion of rich media sources significantly expands the intelligence landscape, transforming "black and white" monitoring into a "full-color" view of public discourse. And it seems timely as 19.3% of respondents are likely to change their most-used data sources in 2025, to cover new content formats such as video and audio/podcasts.

This paradigm shift introduces new challenges for brands and agencies. Where one or two platforms once sufficed to meet most analytical needs, today's environment often requires a more complex tech stack and a broader set of skills to manage it. The lack of platform interoperability further amplifies the demand for robust data extraction, harmonization, and cross-source interpretation. And this is validated by practitioners. When asked what is stopping them from using different sources, they reference API access, that the data source isn't included in their social listening tool or the lack of quality technology to handle certain types of data.

Ironically, the analysts freed up by AI are now needed to operate and synthesize insights across these additional platforms. And this is particularly relevant given organisations are generally spending more on technology in comparison with previous editions of this survey. Not to mention the impact in specific enterprise company segments, where teams are using multiple tools to run their studies.

Efficiency gains from automation are being reinvested to manage complexity, not eliminated outright. It's a shift in workload, not a reduction.

It will be fascinating to see how the market adapts to these changes, especially in terms of delivering more comprehensive, actionable, and multimodal insights to internal stakeholders and clients alike as the survey results suggest that most practitioners are still relying on more basic techniques of social data analysis.

The 2025 report makes one thing clear: the field of social intelligence is expanding, but without a shared methodology or formal training, many practitioners remain isolated. ighly capable, but often self-taught and instinct-driven.

The future will demand more. Not just tools, but frameworks. Not just speed, but meaning. The profession is ready to evolve, not just as a practice, but as a distinct discipline with its own intellectual infrastructure.

Now is the time to shift from signal scanning to insight generation. From automation to interpretation. From listening to understanding.

Alexander Schmitz-Kohlitz
Founder loxias.ai

LOXIAS

PART TWO:

The insights gap:

Moving towards deeper meaning

The buy-in problem

This year's State of Social Listening survey highlighted something that we've known all along. **Social intelligence professionals are largely self-taught**.

They have to be. For those who've worked in this field for more than a decade (33% of respondents), there weren't any formal qualifications or courses dedicated to this type of work. Instead, they've learnt by trial and error. And a lot of the work that's done is invisible - it's not always easy to measure or quantify neatly - which is why it can feel lonely. When there's no shared language, no clear standards, no formal practice it's easy to feel like you're the only one trying to make this work. That's something we're trying to change.

However, because most people are self-taught, they're relying on instinct, not a theoretical base. That's hard to defend, scale or explain so they're defaulting to technology. This is happening more as genAI develops.

The problem is that technology can only take us so far. As a result, it's limiting our ability to get the most out of social data. It's also contributing to the lack of buy-in for our work. And - without wanting to scaremonger - an overreliance on technology runs the risk of removing humans from social intelligence work altogether, even though we're essential to get the full value from it.

Currently, the majority of social intelligence professionals are focusing on use cases such as competitive benchmarking, brand health tracking and crisis detection. These are things that can be more easily measured and many people are using technology to do so. And whilst we're able to generate a level of insight that can lead to recommendations, they have limited business impact.

This is what's contributing to the lack of buy-in from senior leadership.

On top of this, social data analysts are reporting **what they did**, not **how they thought**. They're explaining how they used a tool to provide the recommendation, instead of the meaning interpreted from it. This causes leadership to believe that our work is operational, not strategic. And if a technology is providing the results, then the process can become automated.

Before we know it, we're button-pushers who are replaceable.

Learning to think critically

The truth is, there's far more we could be doing with social data than most of us are right now. There's more value that can be extracted, but it doesn't come from better tools. It comes from better thinking.

Don't get us wrong, technology still plays an essential role in social data analysis. It helps with speed, scale and surfacing signals, and genAI will take this further. But meaning-making, this still belongs to humans.

To get to richer insight - the kind that earns trust, drives strategy and secures buy-in - we need to think critically about what the data is actually telling us. That's not something a tool can automate. But it is something we can learn to do better.

But what do we mean by richer insights?

In last year's State of Social Listening, we introduced the Insights Continuum. What differentiates an insight from a metric or a piece of information is the meaning it generates. Rather than simply summarising metrics from a social listening tool onto a dashboard, we need to interpret the data. It's what differentiates

"There are high levels of credit card debt among [X] group."

from

"People with credit card debt have similar behavioural characteristics as yo-yo dieters. We need our communications to be supportive, as confrontational messaging can have a negative effect."

The Continuum shows that there are different levels of insight that all add value depending on the use cases you're focusing on. The richer the insight, the deeper the level of meaning that's extracted and the more strategic impact it can have.

The Insights Continuum 2.0

The updated Insights Continuum has been developed to help practitioners understand what's needed to go from measuring data to extracting meaning.

It shouldn't be seen as a ladder that needs to be climbed, that only insights at one end of the continuum are valuable. All add value in different ways. Equally, it's not designed to be a checklist of things analysts must do to consider themselves social intelligence professionals. Instead, it should be seen as a framework to help get to the richer insights when you need to. It can help diagnose the areas that are holding you back from this, and give guidance on how to evolve the practice.

So, with that in mind, here's the updated Insights Continuum that offers more complete guidance on how to get richer insights: the methods to consider, the tools to use and the ways to use genAI to support.

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Each stage of the continuum offers:

- **A team frame:** The lens teams commonly operate through (e.g. comms, marketing)
- **An analytical function:** What kind of thinking happens at that level
- **A definition:** How that team typically views "insight"
- **A snapshot:** What insight looks like in practice
- **A recommendation layer:** What teams do with that insight
- **A genAI layer:** Where machine support is helping or hindering

CONCRETE ← → ABSTRACT

	Communication Insight	Marketing Insight	Consumer Insight	Human Insight
Description	An understanding of how a message, campaign, or topic was received online, including where it appeared, how it spread, and the immediate reactions it generated.	An understanding of how marketing messages, brand interactions, and trends are received and talked about. Including emerging topics, platform behaviors, and engagement signals.	An understanding of the motivations, contexts, and decision-making processes behind how people buy, use, and relate to products and services.	A deep understanding of the underlying motivations, emotions, and behaviors that drive people in various contexts beyond product use.
Analytical Mode	Observation	Description	Interpretation	Perspective
Purpose	To help brands monitor their communications in real time and assess public response.	To help brands understand how marketing efforts are performing.	To help brands understand what drives people to choose, use, and stay with products or services.	To help organisations build richer, more culturally fluent understanding of the people they serve.
Analyst Role	Monitor, Spotter	Analyst, Synthesiser	Decoder, Contextualiser	Strategist, Architect
Deliverables	Daily scans, dashboards, alerting systems	Trend reports, theme clusters, volume graphs, segment breakdowns	Narrative maps, behavioural frameworks, insight memos, use-case breakdowns	Executive summaries, cultural playbooks, foresight maps, narrative territories
Influence Type	**Reactive**: provides real-time situational awareness	**Responsive:** provides directional guidance	**Influential:** helps shape business decisions	**Generative:** reframes how teams see the world
Example Methods	Basic keyword tracking, volume alerts, automated tagging provides real-time situational awareness	Boolean queries, classification tagging, platform-based dashboards	Grounded theory, discourse analysis, netnography, thematic coding	Triangulated analysis, hypothesis testing, metaphor/narrative modeling, cultural signal tracking
Risk if Misused	Can lead to overconfidence in metrics and misread performance.	Creates a false sense of depth. Volume and engagement patterns may be misread as meaningful without context	Requires interpretive skill. Without it, analysts may project assumptions or overclaim causality	If rushed or overclaimed, it risks collapsing into abstract theorising or insight theatre.
Analysis Examples	· Topic analysis · Content analysis · Message resonance · Engagement metrics · Message diffusion **Focus:** Communication impact and response visibility	· Trends (volume) · Performance indicators · Interests and affinities · Emerging keywords/hashtags · Influencer resonance **Focus:** Engagement patterns, topic clustering	· Decision-making heuristics · Purchase barriers · Purchase drivers · Unmet needs · Motivations behind product usage **Focus:** What drives choice, usage, and switching; through an interpretive lens	· Psychological drivers · Cultural associations · Life experiences · Habits and rituals · Symbolic meaning **Focus:** Meaning-making, narrative decoding, cultural grounding

Turning genAI from summariser to sidekick

As you can see, there's a role that genAI can play in getting richer insights, without threatening our jobs. We just need to make sure we're using it correctly. And most of us aren't at the moment.

Currently, it's mainly being used for tasks such as summarising data, supporting query writing, tagging and categorising posts etc. These are helpful, but they sit in Signal Scanning and Observation sections on the Continuum, so the value they add is limited.

Instead, what if we considered genAI as a thinking companion for extracting meaning?

That requires a change in how we use genAI. It requires us to ask better questions. It's easy to ask for a summary of results or suggestions of keywords, the challenge is knowing what the follow-up question should be. **Here are a few to get you started:**

WHEN ANALYSING THEMES

"What contradictions exist in how people are talking about this?"

"What's being avoided or left unsaid?"

"Are there emotional undercurrents that don't match the surface language?"

WHEN INTERPRETING SENTIMENT

"What types of frustration are showing up and how do they differ by audience?"

"What does joy look like in this context, is it pride, relief, humour?"

WHEN SENSE-CHECKING STRATEGY

"How might this be interpreted differently across platforms or communities?"

"What cultural narratives might this insight connect to, or push against?"

"What would a critic or sceptic say about this?"

WHEN EVALUATING GENAI OUTPUTS

"What assumptions are built into this summary?"

"Does this feel like a pattern, or a performance?"

There are a couple of caveats to this though. Firstly, as we know, **not all genAI is created equal**. Only the systems designed for exploration, synthesis and external thinking will be able to handle these kinds of questions. To start working with genAI at this level, you need to choose the tools, and the prompts, **carefully.**

Secondly, **prompting will never overcome bad inputs.** If we don't have quality data the model will be skewed. And it doesn't matter what question you ask, the dirty data will taint the response. As boring as it might be, cleansing the data of spam content and irrelevant mentions still needs to be done first.

We hope this updated version of the Insights Continuum offers encouragement to push beyond the work that most social intelligence professionals are currently doing, or being asked to do. This work still matters and still needs to be done. But if there's a way to increase your impact, shifting your focus from metrics to meaning is key.

You might not get it right away, it'll take some practice and potentially a new perspective. But, once it clicks, you'll uncover a whole new understanding of human behaviour that will make your work hit harder.

CONCLUSION

Carving out a new discipline

This year's survey results showed there's a growing awareness of the value that social data can bring to business. On our Insights Continuum, the work most social intelligence practitioners are focusing on falls under communication and marketing insights. But, when we look at the objectives for analysing data there's a larger desire to explore consumer and human insights. The challenge is knowing how to get there.

The other key takeaway from this year's survey is the central role that social intelligence professionals give technology, across all aspects of their work: from collecting and cleaning data to analysing and generating insights. There's a growing sense that they're becoming reliant - perhaps over-reliant - on it.

And this is understandable. Because without formal training in any role, you're always looking for guidance. Social listening platforms are a safe haven because they provide a tangible way of working with and applying social data. It's also easier to convince people of ideas with numbers in a dashboard.

However, not all social insights are so easily quantifiable. And the ones that aren't are usually those that have more strategic value. But technology alone won't get you there. You need humans. Specifically, humans with critical thinking abilities that can apply a range of research methodologies to analysing data.

That brings us back to the original problem...the lack of formal training for this work. There is currently no definitive process for extracting insight from social data.

And this is something that we're looking to fix over the coming years. The first step is to recognise our work - using social data to understand human behaviour better - as its own discipline. Because that's what it is. It's distinct enough from other forms of consumer and market research fields to require its own intellectual infrastructure and language.

By calling it what it is, we can move towards creating shared methodologies, developing industry best practice and talking about our work in the same way. This will help anyone currently working on instinct but looking for guidance and reassurance that their work is grounded in experience and tested methods.

It will also give our work more credibility, resulting in greater buy-in from our colleagues and leaders. It's hard to reduce the impact of social intelligence when it's backed up by evidence from a wider community.

And this is the next step for the SILab. Over the coming months, we'll be defining and publishing a framework for our discipline. We'll open up community conversations around how this will look, because it's your discipline to shape too.

So watch this space.

In the meantime, we're keen to hear your thoughts on this year's survey. We'd especially love to hear how you think we should move our industry forward: in the way we use technology, communicate our work, and formalise our practice. So feel free to get in touch.

Thank You

We'd like to take this opportunity to thank our partners for their support and input into the State of Social Listening survey and this report.

About the Social Intelligence Lab

We're a global community dedicated to advancing the value of social and internet data as a source of insight.

At The SI Lab, we help social listening professionals at brands and organisations use social and internet data to make strategic business decisions based on a deep understanding of people and society. We guide them in building processes and toolkits to help uncover insight in a thoughtful and responsible way.

Our offering is based around three key pillars:

Connect: For social intelligence professionals, there are few opportunities for mentorship and connection. It can feel like you're working in isolation. That's why we created this community. To bring people doing the same work together.

Educate: We know that many social listening professionals lack specialised training. Whatever your experience, you'll find a wealth of information in our resource centre that will help you use social data analytics in your work.

Grow: As the value of social and internet data is realised within organisations, the demand for specialists is going to grow. The SI Lab is here to help you prepare for each stage of your career, from our Growth Certification to our dedicated jobs board.

For more information about the SI Lab and how to become a member visit www.thesilab.com.

You can also subscribe to our newsletter to get up to speed with the latest industry insights: www.thesilab.com/subscribe.

Disclaimer

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