

The New Rules of Social Discovery and Distribution



There's no single path to discovery.

The brands driving real impact know their voice, understand their audience, and build a system around that insight.

Discovery now happens across feeds, creators, and owned channels working together. Reach is earned through relevance, not volume. Content that connects quickly holds attention and unlocks distribution.

The teams winning aren't posting more. They're pairing strong creative instincts with brand-specific insights to choose the right message, for the right audience, in the right format and channel.

Together, these shifts make one thing clear: **intent drives discovery.**

This guide shows how to plan for it.

JACOB & CO

"Jacob & Co. timepieces are designed to feel extraordinary. While other platforms demand polish, TikTok lets us bring them into real life through less-conformed, UGC-driven storytelling – creating a more authentic and engaging experience of the brand."



Luba Dudenko,
Head of Content and Social at
Jacob & Co.



What's Inside

Trend 1 Growth Lives Beyond Your Follower Count

Look beyond follower growth as non-follower views climb on Instagram and TikTok, letting brands reach wider audiences while nurturing their core communities.

Trend 2 Creative Excellence Unlocks Reach

Dive into the importance of standout creative, as higher Entertainment Scores drive more watch time across platforms.

Trend 3 Creative AI Is Strongest When Grounded in Brand Context

Refine your AI strategy and learn why brand-aware AI tools like Vision AI perform better, driving higher engagement, shares, and views.

Trend 4 Social Is Not One Size Fits All

Rethink content distribution and compare strategies from leading brands across TikTok, Reels, Shorts, and static. Learn how TSI helps pinpoint what is moving the needle.

Trend 5 Creators and UGC Are Taking a Larger Share of Social Impact

UGC and creators now drive more social impact as discovery shifts beyond brand channels.

Trend 6 Intentional Posting Brings More Impact

Find out how brands posting two to four times weekly see stronger engagement than high-volume posters, reflecting a shift towards fewer, but better pieces of creative.

Trend 1

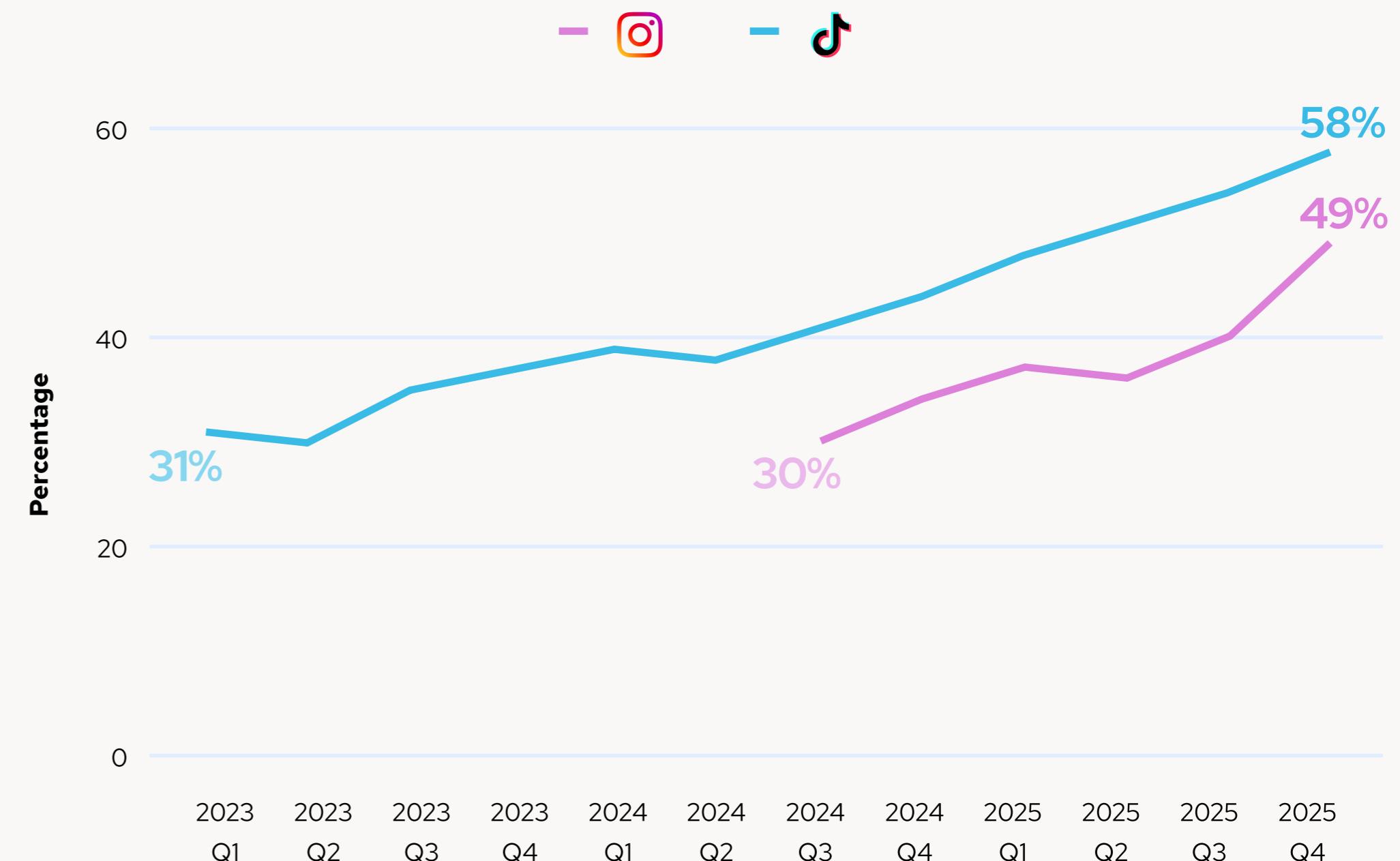
Growth Lives Beyond Your Follower Count

Audiences don't need to hit the 'follow' button to feel a connection to your brand or content anymore. On TikTok, FYP views grew from **31%** in 2023 to **58%** by the end of 2025. On Instagram, non-follower views nearly doubled, rising from **30%** in 2024 to **49%** in 2025.

Key Takeaway

Measure outcomes, not audience size. When awareness is the goal, prioritize reach, views, and impressions over follower growth.

Growth in Non-Follower Views on Instagram and TikTok



Methodology

Dash Social analyzed thousands of brands across TikTok and Instagram between 2023 and 2025 to understand the growth in views and impressions coming from non-followers. On Instagram, we analyzed the percentage of views coming from non-followers and on TikTok we analyzed the impressions coming from the FYP. Timeframes vary due to when metrics became available within Dash Social.

Trend 2

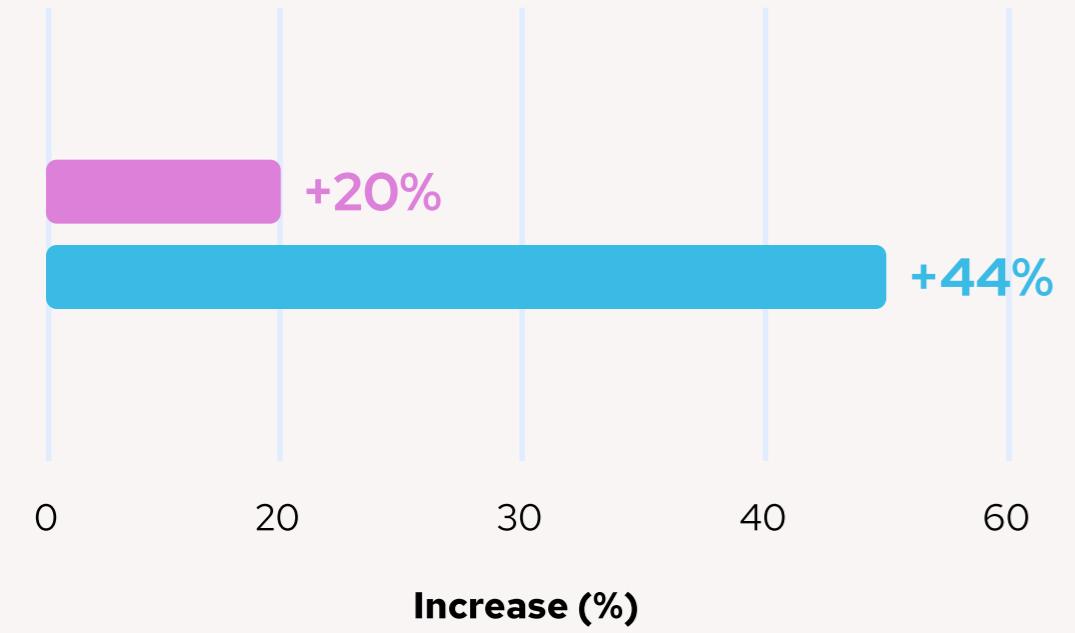
Creative Excellence Unlocks Reach

Attention is trending up, and expectations are rising with it.

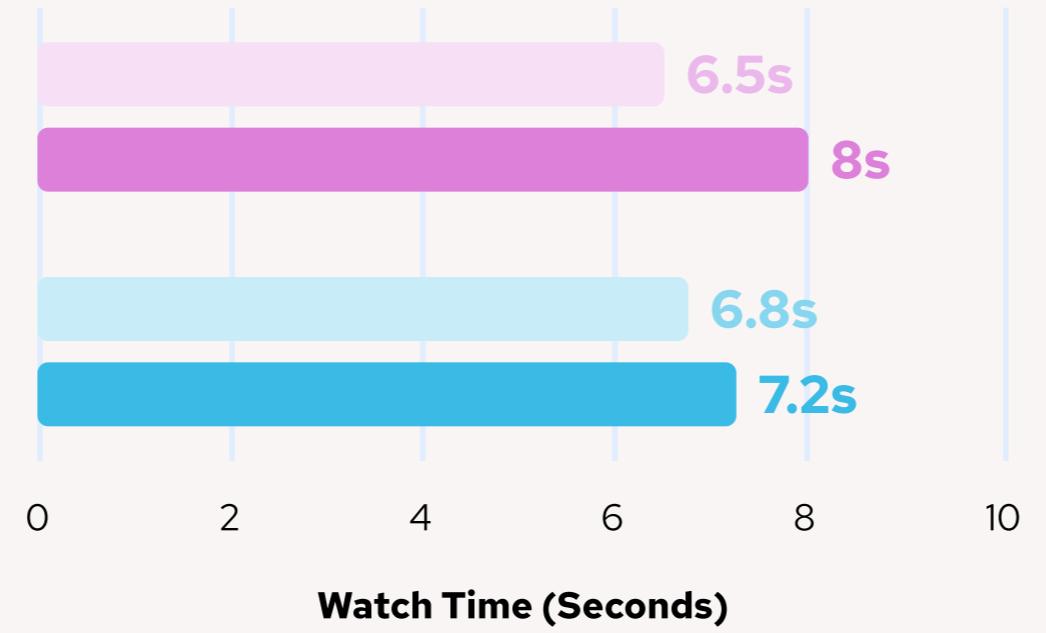
Between 2023 and 2025, brands on Instagram and TikTok saw increases in views and watch time. In a more competitive feed, creative quality is the edge. Platforms reward content that keeps people watching, which extends reach.



Video Views



Watch Time



Methodology

To assess whether entertainment impacts watch time, Dash Social analyzed the same brands in 2025. Each video received an Entertainment Score based on Dash Social's scoring framework. We then compared Entertainment Score with average watch time to determine whether higher Entertainment Scores aligned with longer watch times.

vevo

"Vevo's social content is all about uniquely showcasing artists – from established icons to newcomers on the rise, to the fans that love them. We aim to have a flexible approach to capturing content so that their individuality shines."



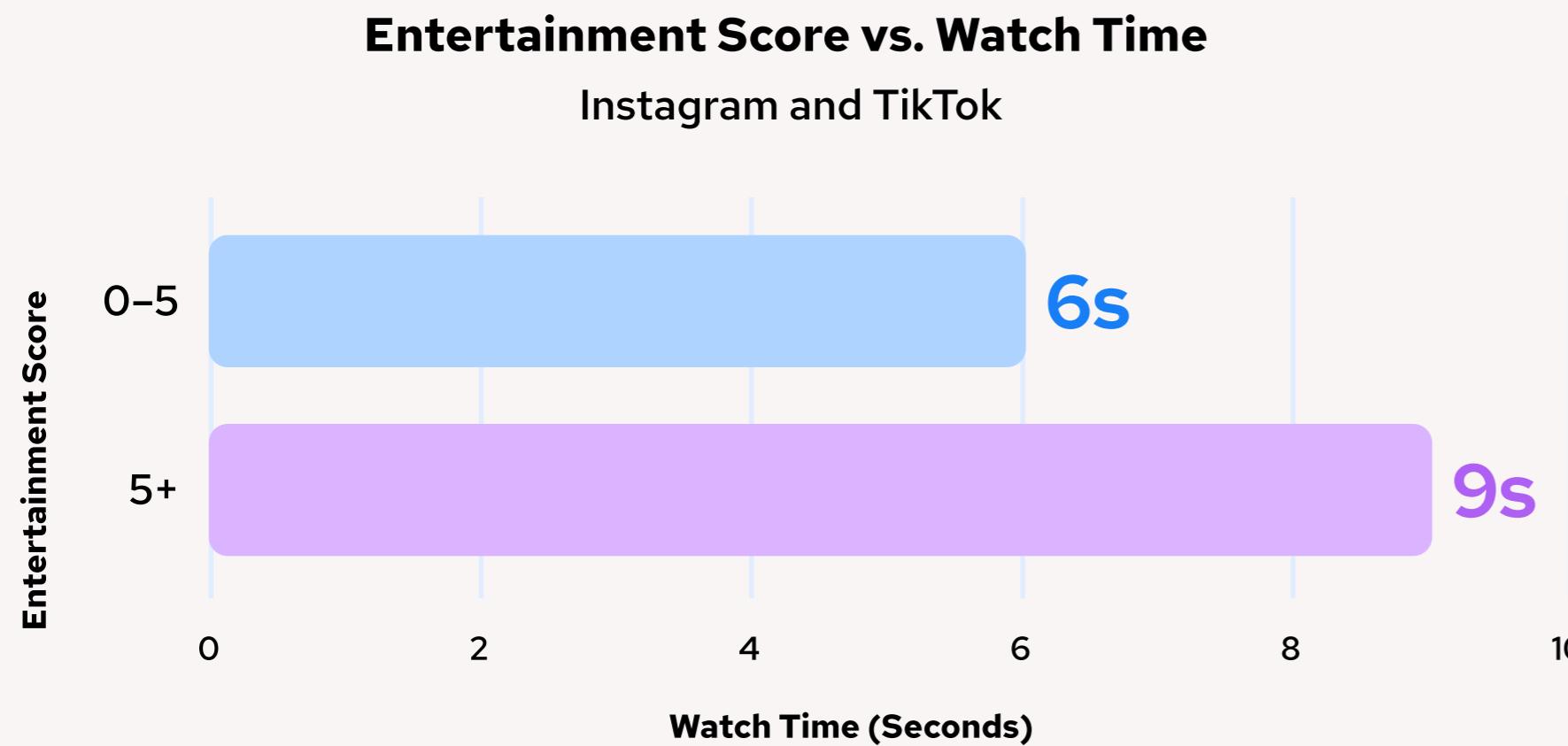
Lindsay Sanchez,
Sr. Director of
Digital Marketing/
Social at Vevo



Entertainment Directly Extends Watch Time

Entertainment isn't subjective anymore. Entertainment Score, a Dash Social proprietary metric, helps brands quantify how entertaining their content is based on factors like engagement, reach, and retention.

Creative drives stronger performance. On Instagram and TikTok, posts with higher Entertainment Scores increase average watch time from **6 seconds** to **9 seconds**, showing how platforms reward content that holds attention.



1stDIBS

How 1stDibs Spikes TikTok Views

"There were several drivers of 1stDibs' TikTok growth in 2025. We increased posting from 1-2 times a week to 4-5. We used employees as on-camera talent for their expertise in design, fashion, and art. We also expanded pop culture coverage, joining relevant conversations by linking moments like Nita Ambani's Birkin or The Gilded Age jewelry to products on 1stDibs."



Jessica Gatdula,
Director of Social Media and
Content at 1stDibs



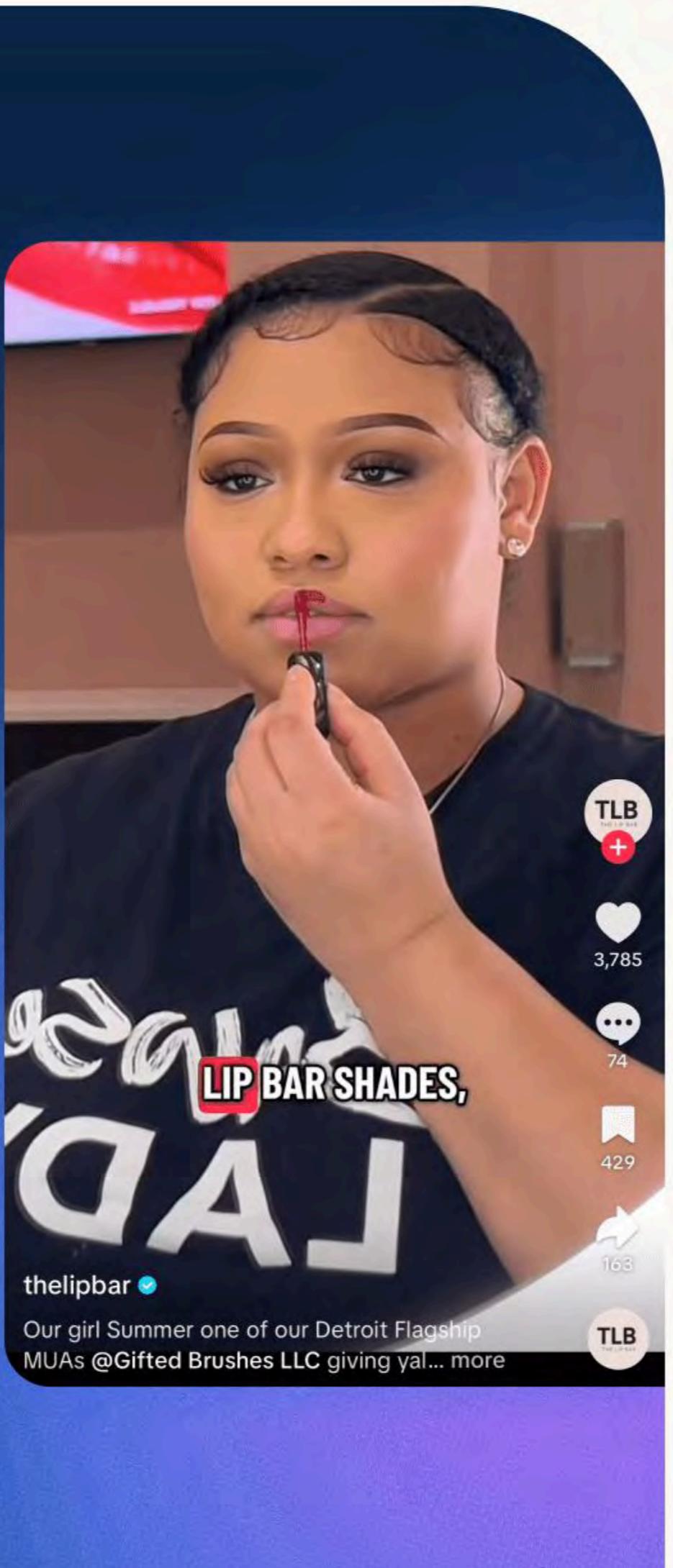


The Lip Bar Harness' TikTok's Unique Culture

"Over the last two years, The Lip Bar prioritized TikTok and treated it as a distinct platform. That approach drove 36% view growth. Content focused on three pillars: founder-led, culture-driven, and employee-generated. Creating native content helped us grow on the platform."



Emily Fonville,
Social Media Lead at The Lip Bar



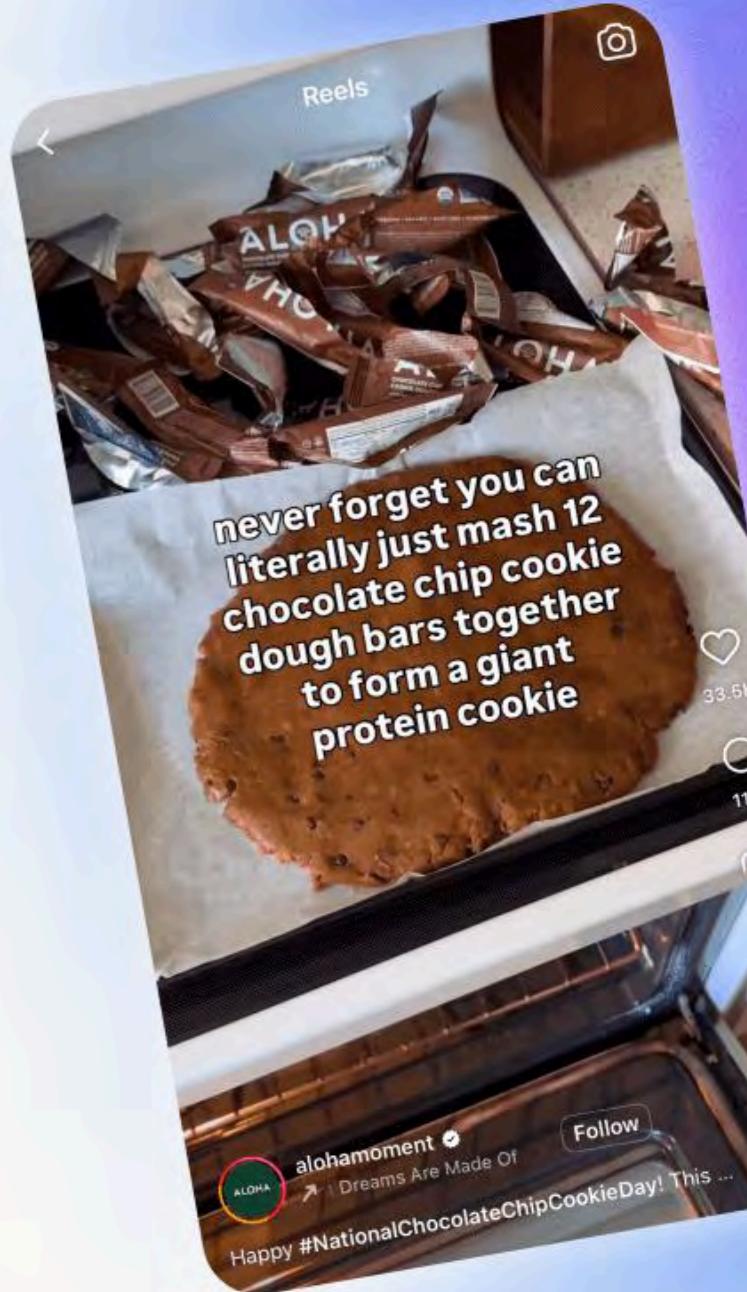
"Our approach to creating engaging and entertaining content is pretty simple. I ask myself: would I laugh, like or share this with a friend? If yes, we have a winner. If no, back to the drawing board. I also think TikTok provides us with the unique opportunity to talk with followers like friends. I let the brand guidelines relax a bit and have fun!"



Colin Geaghan,
Social Media Lead at
Aloha

Key Takeaway

Creative quality drives distribution. Work that holds attention travels farther. Treat social as entertainment, and hook people fast.



Trend 3

Creative AI Is Strongest When Grounded in Brand Context

AI is changing the way marketers automate tasks, brainstorm ideas, and tackle their day-to-day. While it's undeniable that AI is part of the modern marketing world, nothing is worse than the clear mark of AI on a piece of content.

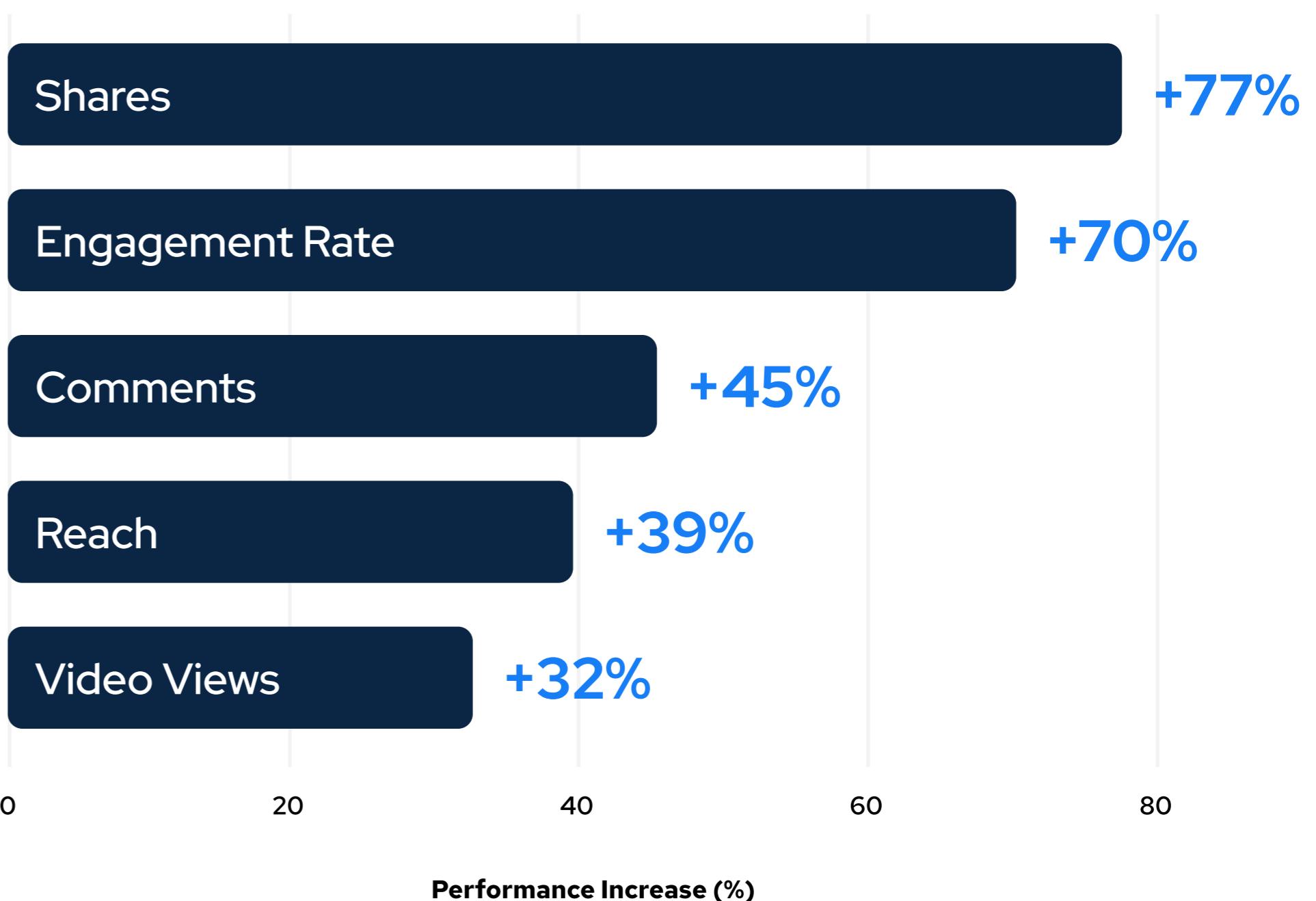
Brand-specific AI outperforms generic automation. Dash Social's Vision AI is trained on your brand's historical performance and audience signals, so it predicts which content will resonate and increases shares, engagement, reach, and views.

Methodology

We analyzed brands' owned in-feed Instagram posts from 2025 (November 1, 2024–November 1, 2025) and compared median shares between media predicted as "stars" and "arrow down." Percentages show how much higher star-predicted media performed.

Brand Specific AI Drives Performance

Vision AI-predicted content outperforms low-predicted content across key metrics.



Trend 4

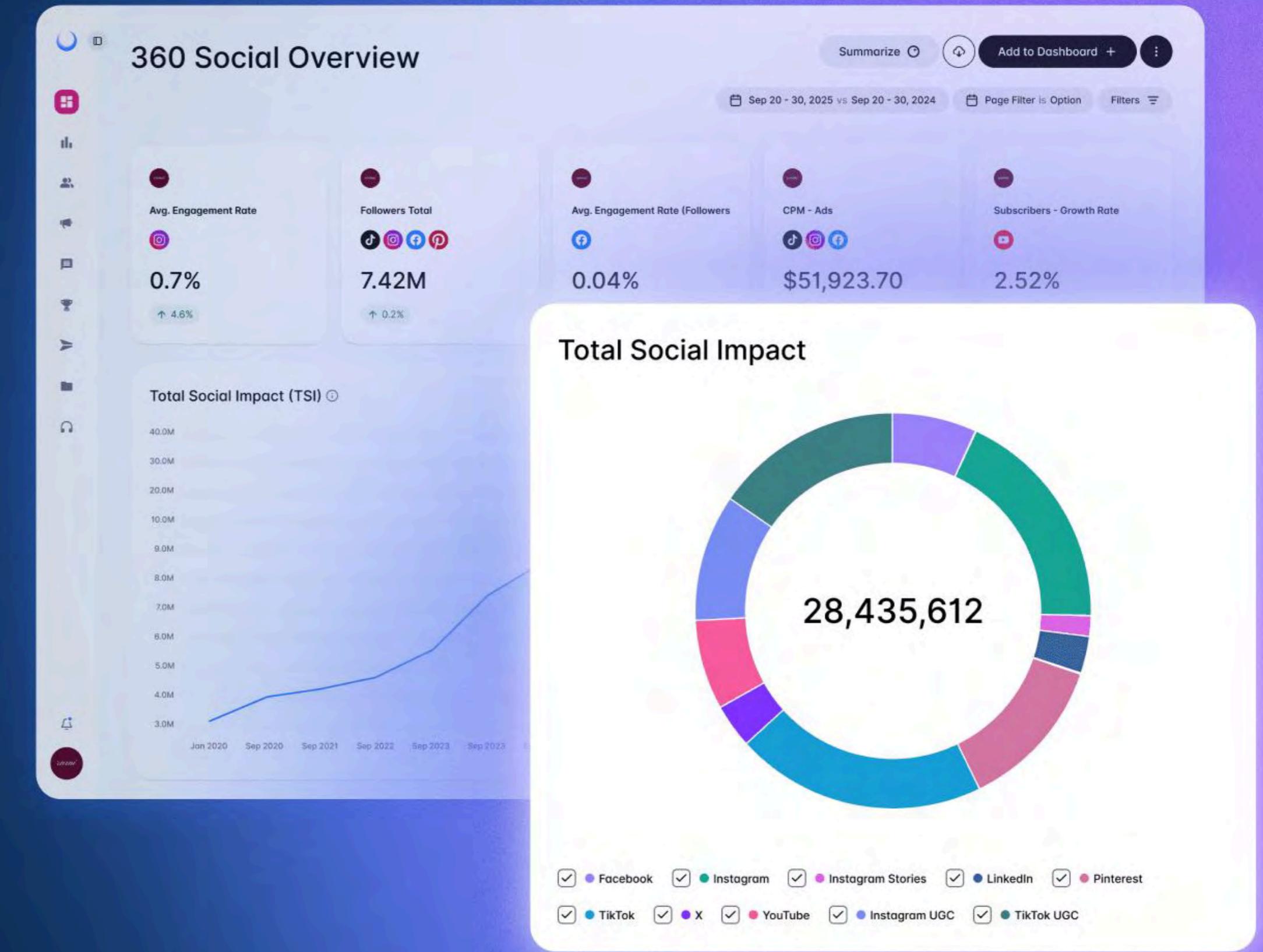
Social Is Not One-Size-Fits-All

Every channel, format, and metric tells a different story, making the full picture harder to see.

There's no universal playbook, only diverse paths to impact. As this shift accelerates, performance becomes harder to read, with impact spread across fragmented KPIs.

Total Social Impact (TSI) brings clarity to that complexity by showing which channels drive the largest share of overall impact and revealing what's accelerating performance and what's slowing it down.

TSI is Dash Social's proprietary metric that quantifies cross-channel performance by weighting and balancing dozens of data points into one consistent, normalized score.





Brooklinen Builds a Well-Rounded Social Strategy

Brooklinen leans into Pinterest, which drives 26% of its TSI, the largest share across platforms. Instagram accounts for 25%, while TikTok contributes 20%, and YouTube adds 9%.

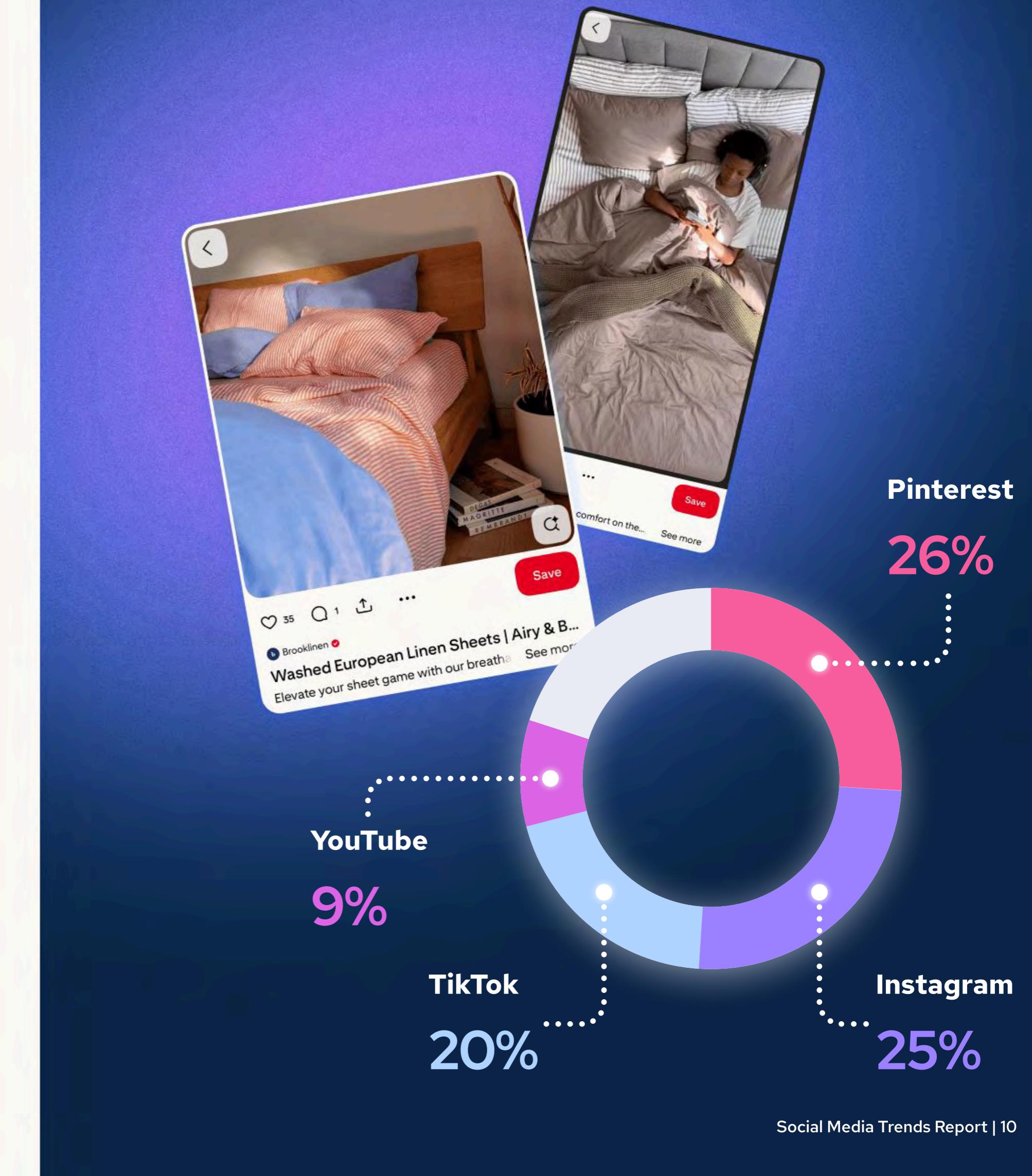
"TSI has been extremely helpful, not just in building strategy, but in showing the impact organic social has on the business overall. We are now able to easily make the case to leadership when it comes to investing in emerging channels."



Julianna Salguero,
Social Media Manager at Brooklinen

Methodology

Using Dash Social's proprietary Total Social Impact (TSI) metric, we analyzed top TSI scores across customers to identify the strategies brands used across their social lifespan.



TOWER 28

Tower 28 Beauty Perfects Platform Selection

Tower 28 Beauty excels at TikTok, with **54% of its TSI score coming from TikTok, and 36% coming from TikTok UGC**. Tower 28 blends UGC, in-office humor, and product content for the perfect blend of TikTok content.

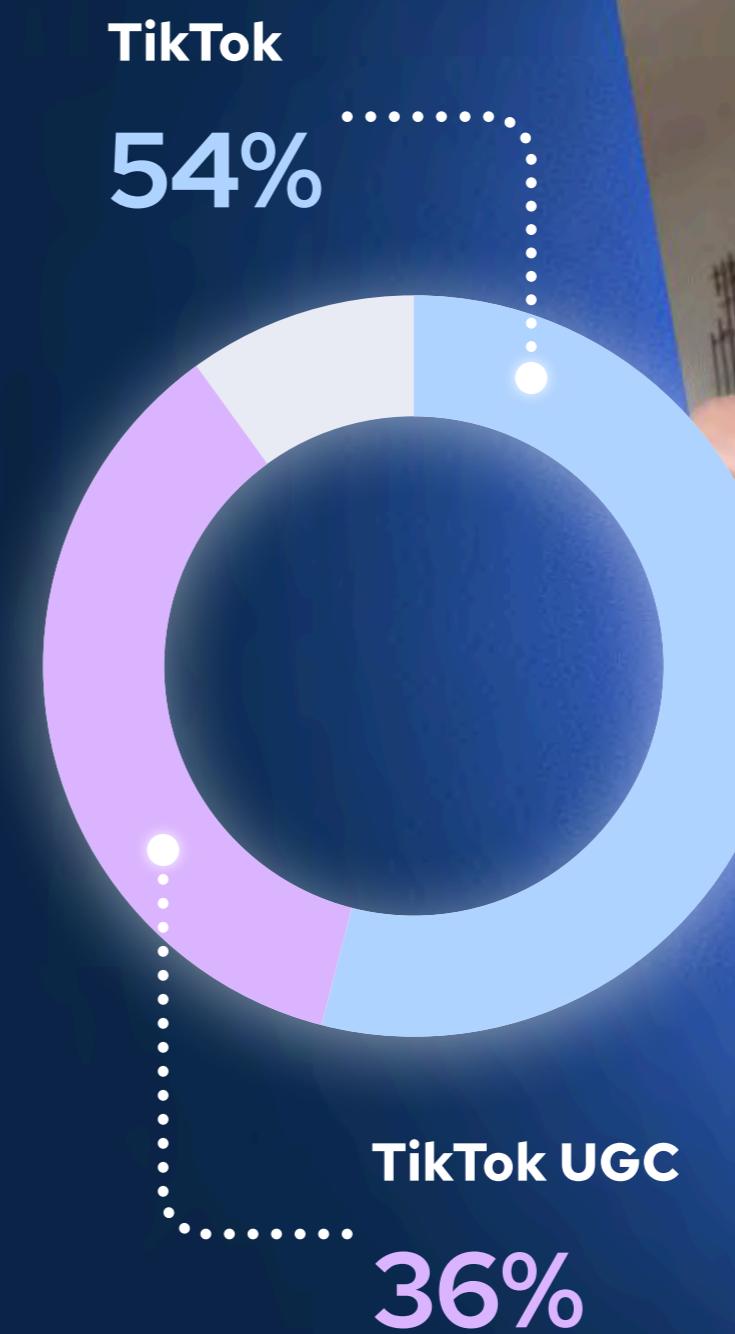
2025 marked the brand's first step into creator collaboration, with the 'CEO of Blush', Toni Bravo. With both the brand and Bravo hailing from Los Angeles, this partnership proved the impact of staying true to your roots with a perfectly-fit partnerships.

Key Takeaway

Look at social performance holistically to guide platform priorities. TSI shows what's driving momentum, helping you double down on what works and adjust what doesn't.

Methodology

Using Dash Social's proprietary Total Social Impact (TSI) metric, we analyzed top TSI scores across customers to identify the strategies brands used across their social lifespan.



Trend 5

Creators and UGC Are Taking a Larger Share of Social Impact

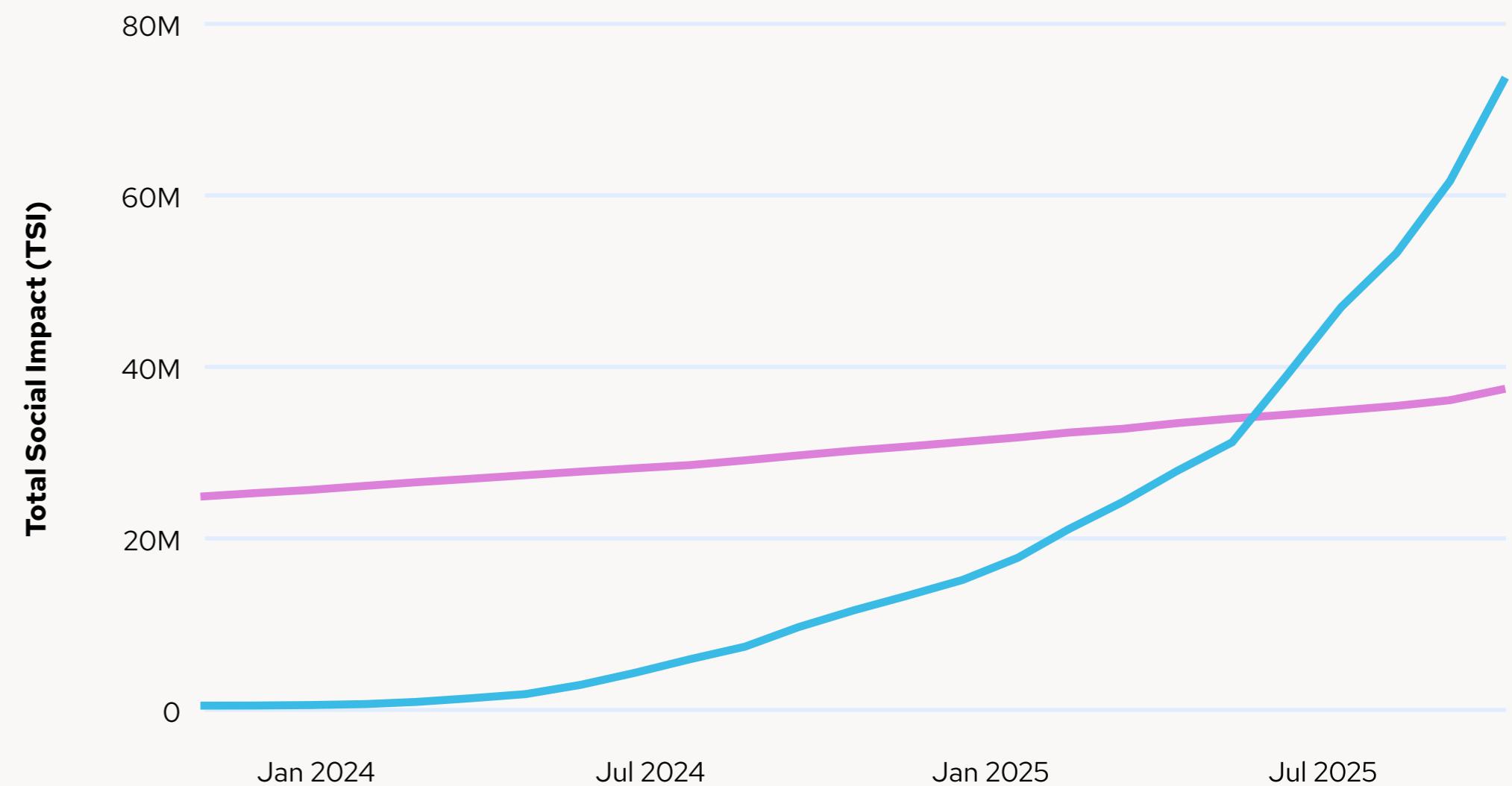
User-generated content is playing a bigger role in social performance year over year.

From November 2023 to November 2025, UGC's share of Total Social Impact grew from **8%** to **13%**. Early growth was driven by Instagram, but by 2025 the mix shifted. TikTok UGC overtook Instagram, accounting for the majority of UGC-driven impact.

This growth reflects how discovery and distribution now work. Creator-led content increasingly carries reach and engagement, expanding how brands show up beyond owned channels.

UGC Growth by TSI Score

Change in UGC Contribution to Total Social Impact, 2024 to 2025.



Methodology

Our data insights team tracked average monthly changes in TikTok and Instagram UGC TSI scores among Dash Social customers between November 2023 and November 2025.

TRESemmé Builds Relatability with UGC

TRESemmé has affectionately coined its UGC creators 'TRESidents', sharing relatable hair tips, styling hacks, and product suggestions for everyday. Their TRESident's work is paying off, with **51% of its TSI score coming from TikTok UGC**. Trésemme enhanced their approach to UGC and platform-fit, kicking off their partnership with Giggly Squad's Paige Desorbo, who has a dedicated TikTok fanbase. This helps expand the brand's reach to a niche community of 'gigglers', Bravo fans, and of course, anyone seeking hair tips.

Key Takeaway

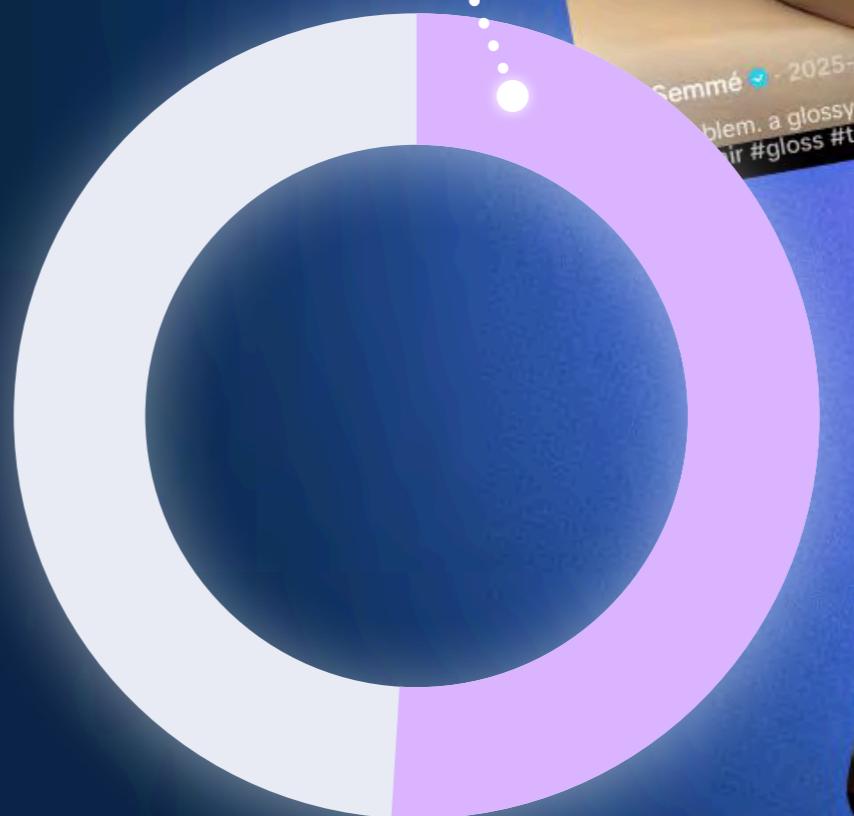
Creator-led content drives results. Brands that invest in creator and community programs fuel UGC, driving gains in reach, engagement, and trust.

Methodology

Using Dash Social's proprietary Total Social Impact (TSI) metric, we analyzed top TSI scores across customers to identify the strategies brands used across their social lifespan.

TikTok UGC

51%



Trend 6

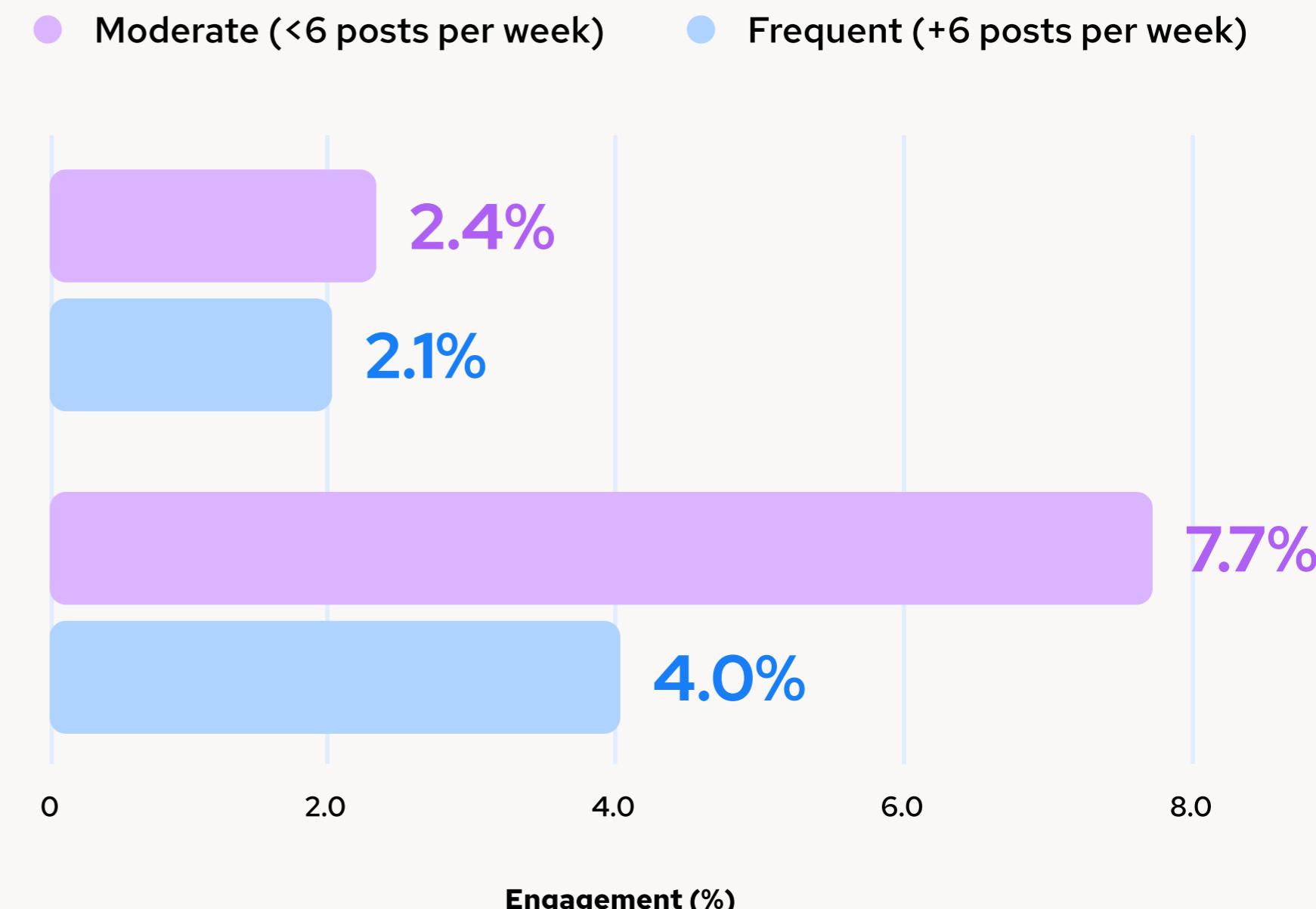
Intentional Posting Brings More Impact

Brands are becoming more selective about what they publish on owned feeds.

As discovery expands beyond followers and more distribution happens through creators and UGC, owned content is shifting toward fewer, higher-impact posts. The focus is no longer volume, but intent.

The data reflects this shift. Brands posting fewer than six times per week see stronger engagement than high-volume posters. On Instagram, moderate posting delivers **13%** higher engagement. On TikTok, engagement is **63%** higher.

Moderate Posting Drives Higher Engagement



Methodology

Dash Social analyzed thousands of brands across TikTok and Instagram between 2023 and 2025 to understand the growth in views and impressions coming from non-followers. On Instagram, we analyzed the percentage of views coming from non-followers and on TikTok we analyzed the impressions coming from the FYP.

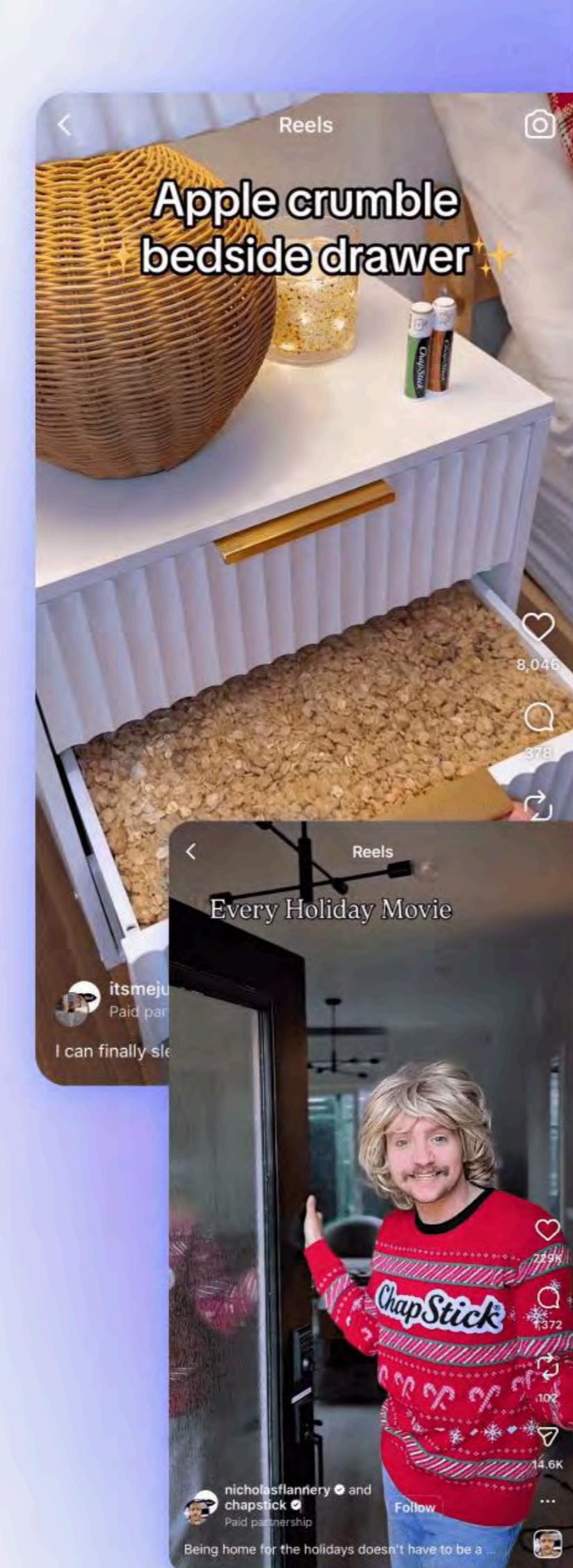


For ChapStick, Consistency Doesn't Mean Constant

"Consistency does not mean constant. We post with intention, not to fill a calendar. Community guides what we create through ongoing conversation. We prioritize cultural context over trends. This approach drives relevance and connection. ChapStick averages a 4.9% engagement rate on Instagram, outperforming high-volume brands."



Megha Goel,
Influencer and Social Strategy Manager,
Suave Brands Company



AmericanGirl®

"We view social with a test-and-learn mindset. Our brand pillars provide the framework, but performance guides the refinement. We prioritize creating with intent and storytelling over trend saturation, reviewing engagement patterns monthly and quarterly, and allowing those learnings to shape what comes next."



Angela Liu,
Senior Manager, Digital
Marketing



Key Takeaway

Engagement improves when owned content is intentional. As creators and UGC absorb more distribution volume, brands can be more selective about what they publish on their own channels.

Conclusion

Social works best when it's specific to your brand.

There is no one size fits all. The brands that grow know their voice, know their community, and build a system around it.

Discovery now lives across feeds, creators, and your own channels working together. Keep creative quality high and hook quickly, because attention unlocks distribution.

Publish UGC and creator work where it fits your story. Measure performance against your goals, then optimize what compounds over time. Wins come from steady momentum, not single posts.

Key Takeaways

- TSI makes cross-channel performance clear and actionable.
- Post with intent. Algorithms reward relevance over volume.
- Strong, entertaining creative leads to longer watch time.
- Non-follower views are climbing as algorithms push content beyond followers.
- Creators and UGC drive TSI and extend reach beyond owned channels.
- AI-driven insights are most valuable when grounded in your brand and history.

Featured Dash Social Customers

1stDIBS

ALOHA

ANTHROPOLOGIE

brooklinen



TLB
THE LIP BAR

TOUWER 28

TRESemmé[®]
USED BY PROFESSIONALS

vevo



Outsmart Social

A social media management platform built for how social works today, uniting your full footprint across owned, creator, and paid with real-time intelligence and streamlined workflows.

THE BEST BRANDS ON SOCIAL. POWERED BY DASH.

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