

500ish Words

The “Facebook Nevers”

The fall of Facebook has nothing to do with people quitting the service...



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The numbers are in and the trend is clear. That is, there is no trend. Despite months of controversy, [users don't seem to be leaving Facebook](#). Certainly not in any meaningful way.

This shouldn't be surprising to anyone because this has been the story of Facebook since nearly the beginning of the network. It goes like this: There's some outrage around something. There's a lot of talk about and stories written about people quitting Facebook. [Then no one actually quits](#).

Okay, sure, *some* people quit. And actually in the U.S., [the number of active users has dipped a bit](#) in recent quarters. But growth in the rest of the world is more than making up for those losses. Yes, believe it or not, there are still people on this planet not yet on Facebook—billions of them, even.¹ And so Facebook grows.

And yet, the tectonic plates are shifting. But they're shifting *under* Facebook, as tectonic plates do. The fall of Facebook was never going to be people quitting the service en masse—it's too interwoven into the fabric of the way many of us use the web these days—it was always going to be the people who never really use the service in the first place. Kids.

In this regard, the situation is similar to cable. For years and years we've heard about “cord cutters”—that is, the people who cancel their cable service (I'm one of them!). But the real story, the one that is and will be far more impactful, [is the “cord nevers”](#)—that is, the people who never got cable in the first place. Again, the young people.

This is still very much playing out in the cable world, but we're seeing many reactions to this reality in the form of [dozens of "skinny bundles"](#) that reside on top of an internet connection. A connection which, quite often, is provided by the cable providers—so, they're adapting.²

That said, it's relatively hard to sign up for cable. You not only need to—get this—*pay* for it, you have to wait for someone to come out to your home to set it up/turn it on. It takes time and money, Facebook takes neither.³

That's why [this Cambridge Analytica fiasco](#) matters, even if only tangentially. It gives people—again, mainly young people—another reason not to sign up for Facebook. Or, at the very least, not to *use* it. Certainly not the way the rest of us must use it.

Facebook has been giving many people many reasons not to sign up over the years. But we've had to: everyone we knew was on Facebook. And eventually, this trickled up and our parents were on Facebook. Now the trickle down effects of this are the opposite: kids don't want to be on Facebook *because* it's what their parents are using.

And so while it's true that Facebook may not be losing users as a result of their continual mishaps, those blunders mixed with the inclination of kids not to use Facebook in the first place is a potent combination. Perhaps even lethal.⁴

But again, Facebook is so integrated into so many lives that in many cases you're basically forced to sign up. Even the kids in many cases. Just as they must sign up for an email account. It's a rite of passage, in a way. Your entrée onto the internet. So perhaps "never" is a bit harsh of a word here.

Though if your friends are no longer using it... And your parents *are* using it... *And* they're being creepy with your data... [And will continue to be...](#) Well, maybe, just maybe, why bother? You may still sign up, but you may not *use* it. And [the data seem to bear this out](#).

This is why [the smartest thing Facebook ever did was buy Instagram](#).⁵ Instagram is likely past a billion active users on its own now. At some point, it will probably surpass Facebook in terms of users—certainly amongst the demographics Facebook most cares about from an advertising perspective. Facebook providing Instagram is the equivalent of the cable companies providing internet.

This will matter more and more as the "Facebook Nevers" grow up. The network was never going to collapse because everyone left, it was always going to fade over time as young people didn't replenish the data it needs. And so it will wither, ever so slowly. If you look closely, you can see it already, even as it still looks so ripe.

¹ And many of those people aren't on Facebook because they're not on the internet—at least not with any regularity. Hence, [this initiative](#).

² And while it may have been a hard transition to move from people paying ~\$150 for cable+internet to ~\$75 for just internet, presumably those guys quickly realized they should be happy just to maintain the relationship. Prices will rise over time, as they always do, and add-ons will be added over time, as they always are, and before we know it, [we'll be back to paying \\$150](#) to the cable guys!

³ This is why the true disruptor of cable is wireless. Once those pipes in the sky become big enough for all the video content, all the time, we will truly see the “cord nevers”—no more cords literally! This is already true of many people who simply tether to their wireless devices for internet, but it's still not feasible (for both speed and cost) for most people. [But this will change](#). And this is why the cable companies will buy/merge/launch wireless companies...

⁴ Calm down, I'm talking loooooonnnnggg time horizons here. Maybe a decade or more. But I think Facebook is in [the anagnorisis stage](#)...

⁵ And to a lesser extent, WhatsApp, but that's a different demographic again, and [has other issues when it comes to monetization](#).