



NAVIGATING THE MEDIA LANDSCAPE IN 2024 AND BEYOND



INTRODUCTION

As we enter the fifth year of the Covid era, it's high time we retired the cliché about the "rapidly evolving" media landscape. Let's be absolutely clear: the media world is not changing. We are well and truly over the tipping point – it has already changed.

This new reality demands a different approach. Old certainties have been consigned to history, with the previously concentrated influence of traditional media diluted by a kaleidoscope of social channels and websites. News organisations continue to be buffeted by economic uncertainties, pared-back advertising budgets and the relentless hollowing out of newsrooms.

In 2023 alone, Reach, the UK's largest commercial media company, made 650 journalists redundant. This amounts to one in five of their entire editorial staff. And here's another sobering stat for you: there are now 9,000 more PRs in this country than there are journalists.

Perhaps the biggest change of all, however, comes in the way news is consumed. Most young people interact with the news via social media (a habit which is spreading exponentially across the generations). This has significant implications for comms strategies – but don't be tempted to throw the baby out with the bathwater.

Because people still love stories. And the source of most impactful news stories remains unchanged. Which is to say: traditional journalists provide the spark, social fans the flames. And human stories which move the heart will always be one step ahead of the algorithm.

SO WHAT'S A BRAND TO DO?

This document seeks to answer that question. Five essays tackling the gnarly question of how to communicate in a brave new media world. First a forensic look at the landscape, and how to find the best way forward. Then we plot a route through the choppy waters of "angertainment", the rise of direct-to-consumer media, the dizzying array of social media platforms and, finally, how technology will shape the future of news.

Five rules for navigating the media landscape in 2024 (and beyond) – because while it has never been easier to reach people, it's never been harder to make them care.

THE KEY POINTS

1 The Tipping Point – We are consuming more media than ever before, but the means of consumption and range of sources have changed enormously.

2 Cutting through in the age of "Angertainment" – Inflammatory headlines drive a lucrative business model. But is it worth engaging?

3 Mate marketing – The rise of direct-to-consumer media.

4 Platform Panic – Confused by the social media swirl? Here's a handy rundown of what you need to know in 2024.

5 Technology Will Shape the Future of News – Here's how.



RICHARD PRICE
EDITORIAL DIRECTOR

1

THE TIPPING POINT

With the distorting effects of the pandemic out of the way, we can now say that at some point in the last four years we passed a tipping point in how we interact with the media: decisively away from editorially-curated media towards algorithmically-curated media.

That is, from platforms with an allotted, finite space or time to fill, to platforms designed to fill as much of our time as possible.

Around 2021, the global proportion of people who got direct access to news via apps or websites was overtaken by those who prefer to go via social media, and that gap has widened. Other measures tell the same story – and the younger you are, the less likely you are to go direct to the news source.

Our capacity to consume more content has not increased – we still have the same 24 hours in a day. It's just how we do it and the range, and number, of sources that have changed. For example, Ofcom data shows we are, on average, watching half an hour less video a day than five years ago. Live TV, meanwhile, has plummeted by nearly an hour as other sources of moving images fill the gap.

This isn't, to use a cliché, "the new normal" – because it's not particularly new. It's just what's normal, and it's permanent. The same dataset shows content consumption volumes broadly stabilising, with the rapid rise of TikTok stalling, for example. The lingering sense that social is somehow a secondary or lesser medium needs to be abandoned.

Consequently, trying to penetrate users' spheres of attention is a battle. TikTok has no business news editor with an interest in electric vehicles that you might pique, for instance. (Even if it did, the UK overwhelmingly prefers to read its news online.)

Figure X: Proportion that say each is their main way of getting news online

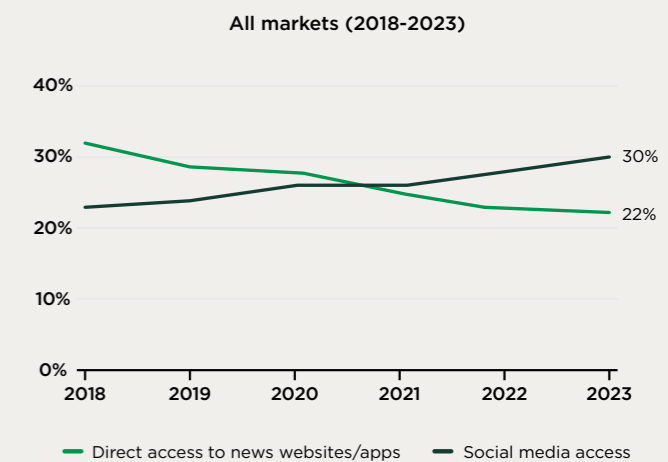
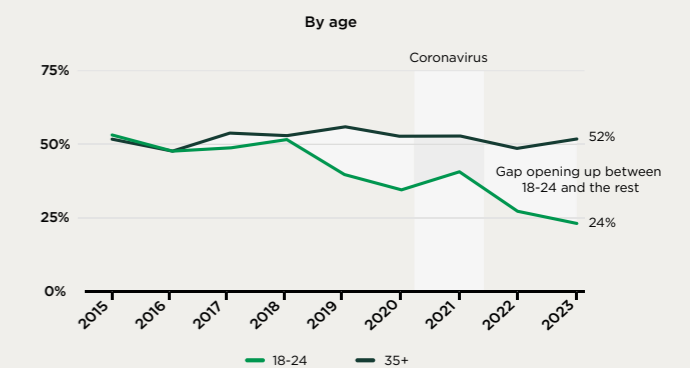


Figure X: Proportion that accessed online news by going direct to a news website or app in the last week



Source: Digital News Report 2023, Reuters Institute for the Study of Journalism, University of Oxford: https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2023-06/Digital_News_Report_2023.pdf

And everyone else is battling for the same eyeballs, including newsbrands themselves. Many therefore play to what they know their audiences will already give their attention to - understandably, as attention is their financial lifeblood.

Looking ahead, AI-written SEO content and more paywalls to defend copyrighted material from bots will make grabbing human attention even harder. And when we do have attention, it's debatable whether there'll be trust. Only a minority of people, on average, see content on social as accurate, trustworthy or high quality.

Only a minority of people, on average, see content on social as accurate, trustworthy or high quality.

Figure X: Attributes of news platforms (7-10 ratings)

	TV*	NEWSPAPERS*	RADIO*	SOCIAL MEDIA
is important to me personally	70%	67%	62%	59%
helps me understand what's going on in the world today	74%	69%	63%	55%
is high quality	74%	68%	66%	44%
is accurate	70%	66%	64%	40%
is trustworthy	69%	66%	65%	40%
Offers a range of opinions	67%	66%	60%	58%
Depth of analysis and content not available elsewhere	65%	64%	55%	42%
helps me make up my mind	63%	64%	55%	44%
is impartial	63%	61%	58%	40%

Source: News Consumption in the UK 2023, Ofcom

SO WHAT'S A BRAND TO DO?

The best comms ideas have always happened where what matters to the audience, what matters to culture and what matters to the brand meet, in that order of importance. Understanding this nuanced context is now crucial: without that audience and cultural resonance, ideas just won't travel. This requires humility, empathy, and no little bravery.

Don't think discrete channels. Social influences editorial. Editorial still influences social, although now often indirectly - informing a creator's opinion, being shared via a screenshot in a reel, but not driving a click to a website. So accept that stories will travel beyond your control, and often your ability to measure.

And think laterally: Where else might you capture your audience's attention?



MICHAEL SHEEN
CREATIVE DIRECTOR

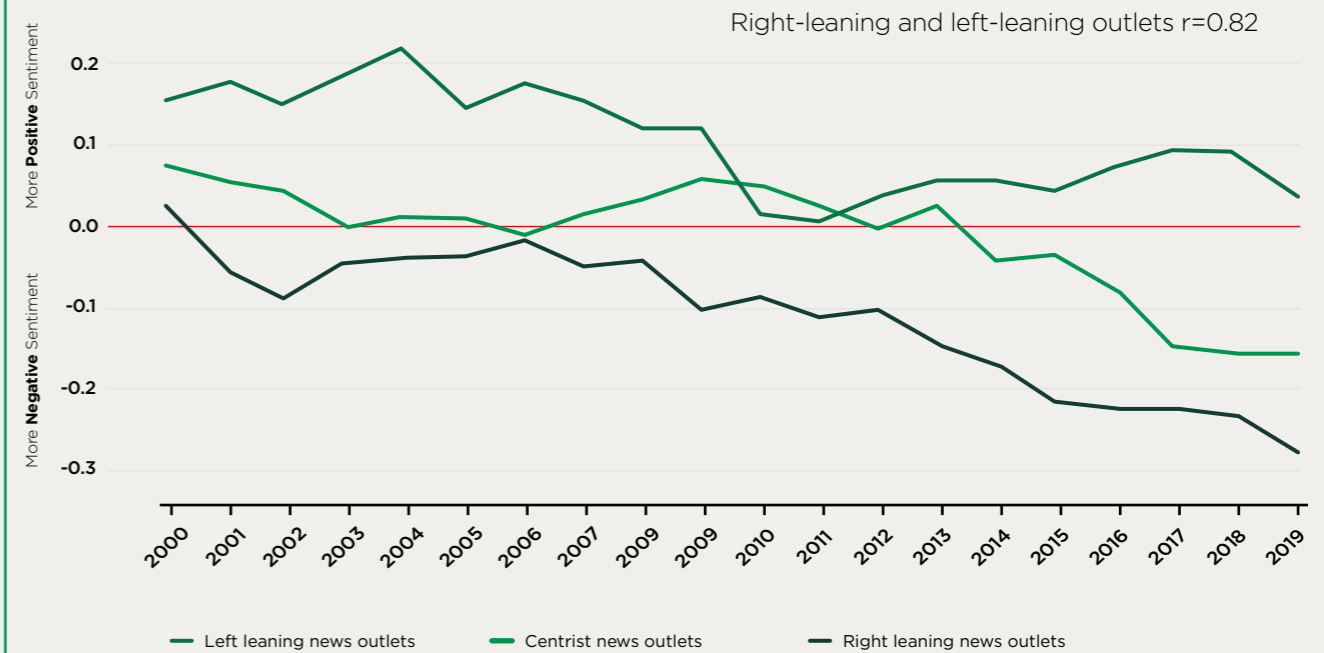
2 CUTTING THROUGH IN THE AGE OF ANGERTAINMENT

We are in the "Angertainment" media age. News, from the fastest growing sources at least (such as GB News in the UK), has shaken off bothersome impartiality, grown ever more emotional and actively sought to provoke. Inflammatory headlines now drive a lucrative business model that seems to be only going one way.

A March 2023 study in the journal Nature Human Behaviour offers valuable perspective. The title says it all: "Negativity drives online news consumption." Add a negative word to your headline (harm, heartbroken, ugly, troubling and, yes, angry), and you get 2.3% more clicks on average. Conversely, adding a positive word (benefit, laughed, pretty, favourite, kind) achieves the opposite result.

Another study determined that the prevalence of angry headlines increased by 104% over the past 20 years - and that this applied to all parts of the political spectrum, from far left to the furthest reaches of the right. Anger doesn't discriminate, in fact we are normally angry about the same topics for opposite reasons.

Average Sentiment of Headlines in Popular News Media Outlets by Ideological Leanings* of Outlets (N=23 Million)



Source: D Rozado et al., PLoS ONE, 2022

This means thoughtful balanced pieces, so desperately needed in these turbulent times, are not only expensive to produce, but are demonstrably less loved by consumers.



But hasn't news always sold the sensational? To a degree, yes - it was way back in the 19th century that William Randolph Hearst coined the phrase "if it bleeds it leads". But by and large these stories were based on fomenting fear about more distant subjects and in the absence of social media there was no real participatory element.

In many cases brands benefited from this fear by selling comfort, stability, feelings of the familiar and a sense of safety, so they managed to cut through.

Today, however, fear has given way to frustration, a sense of injustice and loss of control. In combination these elements seem to have eroded our coping skills and turned us into aggressive swivel-eyed loons (*Gavia articulata oculos*) both online and increasingly offline.

Worryingly, people can't help but get off on it. It sparks a fight-or-flight response that fills you with energy, gives you a sense of voice, a tribe to back. Nobody can reasonably expect their opinion on Twitter (sorry, X) to change the minds of their equally passionate opponents, but social media has become performative. You just can't help yourself, even if sometimes you regret it.

SO WHAT'S A BRAND TO DO?

Lurking at the edge of these impassioned debates are many brands still following the traditional method of building salience by just being there, hoping to gradually etch into the consumer's mind. But this method faces significant hurdles.

The age of Angertainment is characterised by highly polarised social discourse, in which the two warring sides are not willing to give quarter.

We are not, to be clear, advocating regressive values. Quite the opposite in fact: brands that succeed long term will be those that align themselves with the progressive side of the current discourse. Martin Luther King, Jr. hit the nail on the head half a century ago with his observation that "the arc of the moral universe is long, but it bends toward justice".

So, don't bring a cockroach to a cock fight. Remember you are trying to get the attention of those preoccupied by righteous noisy rage. Needless provocation statements are unhelpful, but you must take control and make full-throated, sometimes difficult, statements.

Engage in meaningful dialogues, demonstrate tangible actions, participate in social responsibility initiatives and commit to sustainability and fostering diversity and inclusion, both externally and - just as importantly - within your organisations.

And while silence remains an option, be aware that the goalposts have moved. Saying nothing is now called "Greenhushing", "Socialhushing" or even "Humanehushing". And if you create a brand vacuum, rest assured that it will quickly be filled by angry narratives you cannot control.



JOHN LYNCH
HEAD OF STRATEGY



3

MATE MARKETING: THE RISE OF DIRECT-TO- CONSUMER MEDIA

There's been a huge power shift in the land of consumer media. Where once a select few news organisations held a monopoly, the playing field is now broader than ever. First Twitter turned us all into citizen journalists, then the rise of TikTok transformed the way stories are told and shared.

The net result of this is that brands are now on an equal footing with traditional media. The same direct-to-consumer tactics they have used for years in sales are now being applied to news - and the rise of the Brand Admin has only accelerated this.

Take KFC's recent fries launch. After years of chatter about their chips not being up to scratch, an incentive broadcast by its social media manager announced that "1 like" was all it would take for KFC to change its recipe. Cue an internet meltdown - and a slew of publicity for the new flavour.

It is a significant role reversal. Due to news outlets' reticence to cover a story already on social, with the right content at the right time, brand owned media can be the origin of a story - lighting a fire that spreads thanks to traditional media fanning the flames.

Tesco took a similar media-led brand approach. For its first ever TikTok video the supermarket giant launched a competition to find the next voice of its self-service check-outs. Fans were encouraged to audition using the platform's features to "duet" with the self-service machine and share it online.

Speaking the audience's preferred style of digital language resulted not only in strong brand engagement with a younger audience (and the future Tesco shopper) but also created a story worthy of column inches due to the universal nature of the self check-out experience.

MATE MARKETING

This is fanbase marketing - or mate marketing - where brands build community, reward customer loyalty and seek to reach new audiences with "you heard it here first" intel on any company newness. The rise of this fandom phenomenon means that brand social channels are now an essential source of news.

Half of journalists in the UK say they consult a company's social media channels when writing stories, and it's not just established brands who are capitalising on this. Younger brands are making a big play for attention and are well aware of their power to disseminate information.

Corteiz, the streetwear brand, has taken the media-led brand concept to new heights. When it first launched in 2017, its private Instagram account (with a grand total of 50 followers) and password-protected website meant the only way to hear about it was through word of mouth. Exclusivity guaranteed.

Not needing to rely on press releases, paid ads, seeding or content on the explore page allowed Corteiz to own the narrative and build a community of true fans who hung on their every post. While its social pages are now public, the brand continues to launch new drops and hyped garments direct to its audience.

The feeling of exclusivity is reinforced by spontaneity, with last minute locations revealed using its own platforms as a news engine, generating maximum hype and virality.

SO WHAT'S A BRAND TO DO?

Whether a household brand looking to be more media-led, or a newer contender building an entire strategy on acting like a media owner, there is one thing this new generation of successful broadcasters have in common: they are obsessive about context.

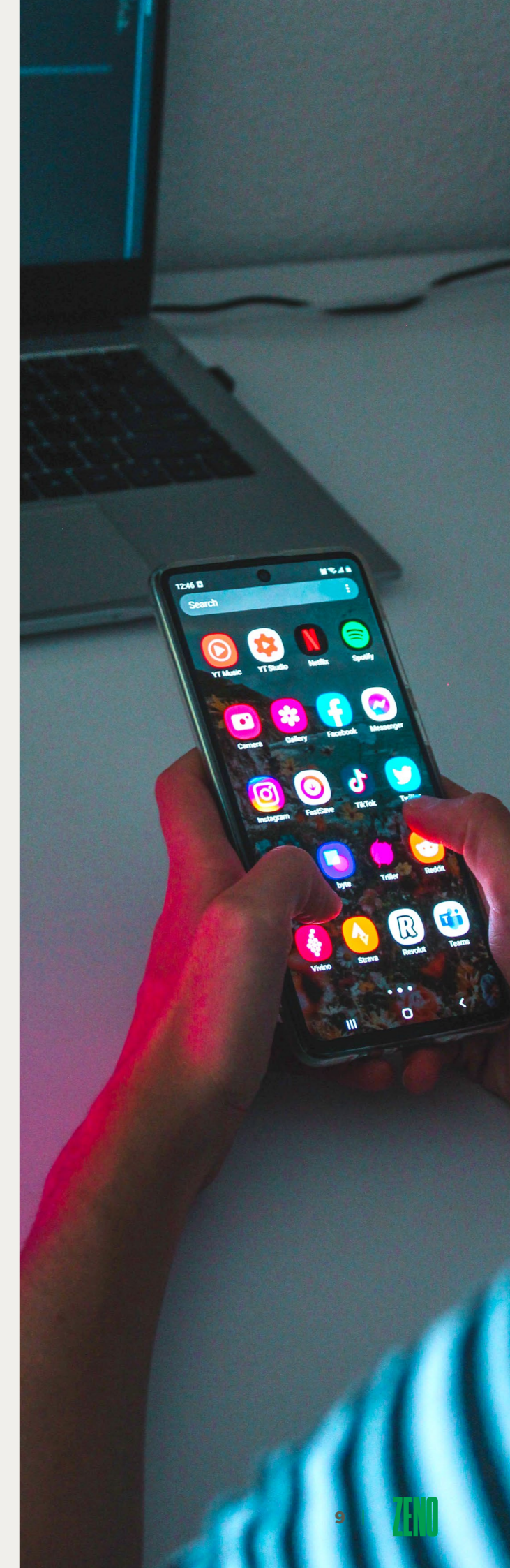
Not just the industry context within which they operate, but what audiences are experiencing, feeling and caring about. The brands that win at both sharing their news in a way that builds loyalty and trust among their community while also achieving mainstream media success show hyper-sensitivity to what's going on in the real world - and evaluate how they can authentically add value to people's lives.

And yes, launching a competition to be the next voice of a Tesco till is absolutely contextually relevant. No matter how trivial it may seem, that voice is part of popular culture: a universal reality consistently present in all our lives.

Expect to see even more brands taking a "conversation first" approach to sharing their news because not only do journalists want to see the back of blanket press releases, consumers want a two way dialogue with brands that makes them feel like they're being spoken to as individuals too.



SOPHIA BOUDJEMAA
BRAND DIRECTOR



4 PLATFORM PANIC

For those who have been playing it on their mobile phones for the past decade, Platform Panic is quite simply a fun, curiously addictive game. But if you work in communications and are struggling to keep up with the social media swirl, the phrase sums up an all-too-familiar feeling of bewilderment.

But as you will have observed from the first three essays in this collection, social platforms are no longer an addition to the media: they are essential infrastructure. Social and editorial are mutually influential – so much so that they cannot be separated.

And there is a lot to digest, starting with the fact that Gen Z audiences are increasingly consuming their news through social media. Instagram tops the list with 44%, followed by Facebook (33%), Twitter (31%) and TikTok (29%). This has prompted increased regulatory pressure on platforms to counter the spread of hate, misinformation and disinformation.

While much negative attention has been paid to Elon Musk's rebranding of Twitter to X, Mark Zuckerberg's much vaunted alternative, Threads, is struggling to make a dent in its dominance. While Threads signed up more than 100 million users in less than five days when it launched in July last year, it has since seen mammoth drops in usage and is trying out all sorts of different techniques to revive itself.

Decentralised social media platforms such as Mastodon, Diaspora and Hive are capitalising on the big guns' struggles. All have enjoyed a surge in monthly users, with audiences turning away from ad-based models, seeking out more transparency and control of their own data. The BBC's Research & Development Team is even exploring how they can establish a presence in the Fediverse.

There have also been some joyously unexpected developments in recent months, such as the extraordinary vision of a movie in 23 parts. Film company powerhouses such as Paramount are capitalising on the rise of audiences consuming films and TV shows on TikTok by releasing popular films across multiple small clips.

Instagram has even confirmed that it may soon allow users to publish Reels up to 10 minutes in length, competing with TikTok, X and YouTube. That's right... long-form video is back. A strong channel strategy and focus should always be built on insight, data and auditing, well ahead of skipping to the content part. You wouldn't move in your brand spanking new furniture before you'd finished the hardwood floors, would you?!

SO WHAT'S A BRAND TO DO?

With so much social media instability, salacious news stories and "best practice" changing on a weekly basis, it's trickier than ever for brands to identify which platforms to engage in. To help set yourself up for success, it's important to go back to the foundational elements of a good, sustainable social media strategy.

A strong channel strategy and focus should always be built on insight, data and auditing, well ahead of skipping to the content part. After all, you wouldn't move in your brand spanking new furniture before you'd finished the hardwood floors, would you?



BEN COOPER
DIGITAL DIRECTOR

To help clarify matters, here are five trusty Ps (principles) which can alleviate your brand's platform panic:

1 PLAY

Is TikTok or Snap where your audience is playing? Dive into where your key audiences are – they should always take priority.

2 PARTICIPATE

Do you have the resources to ensure that you're regularly engaging, posting and growing on this channel? Why not try conquering a few primary channels, ahead of trying to have a presence across every new platform?

3 PERFORM

Is the type of storytelling, content or messaging going to perform on the channel? Remember, not every piece of content is fit for every platform or format.

4 PROTECT

Are the right processes in place on the platform of choice to protect your brand? Do the platform's values and advertising practices align to those of your business?

5 PAUSE

There's nothing wrong with taking a "wait and see" approach. With new platforms emerging all the time, it's important to see how they roll out, evolve (and how other brands follow suit) ahead of investing budget, time and resource. Who remembers Clubhouse?!

Keep these principles in mind and you won't go far wrong. And don't expect the pace of change to slow down any time soon.

5

HOW TECHNOLOGY WILL SHAPE THE FUTURE OF NEWS

The fact that the transition from physical newspapers to online news media has taken so long is testament to how ingrained traditional media is. But today's reality is that online media gets more of our attention, more often, in more places and in many more formats.

The classic written article is frequently replaced by a video clip on your favourite news site and a shorter 15 second soundbite shared to millions on TikTok. If the news is big enough it may even spawn new podcasts, Subreddits and Discord servers for endless debate, discussion and speculation.

This shift looks set to continue. So what can we expect from the future?

CHANGES IN DISTRIBUTION

The news stand offered a simple choice: a dozen or so titles vying for your attention with headlines to suit your level of education and political views. The online marketplace for news is very different, with hundreds of online news outlets competing for attention via their own platforms, social media distribution and promotion.

Social media platforms have a huge amount of control over who sees what, so understanding how they manage and distribute content will be key to the future of news distribution.

The distribution landscape will likely change again as we transition to more immersive spaces online. VR and AR are already beginning to show their promise when it comes to storytelling. Being immersed in a warzone, seeing the story play out from the other side or exploring that crime scene in 3D holds huge potential to inform and educate.

CITIZEN JOURNALISM

Anyone with a smartphone and an x.com account can now share their story with the world, and we have seen individuals with little to no formal training grow huge, engaged audiences on social media.

Regular people can be on the ground, unfiltered, free and live immediately: an appealing prospect for a generation that has grown up with instant news. In the absence of an editor and supporting team, however, they can be more susceptible to misinformation and pressure from parties seeking to control the narrative.

Alongside this, some journalists cast out by traditional media channels are building huge audiences of their own based on the promise of more candid content. Take former Fox News host Tucker Carlson, for example. Even his lowest viewed show on x.com has reached an audience far beyond anything prime-time cable news could dream of.

IMPROVEMENTS IN QUALITY

Publishers need to balance speed with verification and be mindful of misinformation. None of the tools we have today – even with the wider introduction of AI – can truly automatically verify any given story.

As the sheer volume of content creation increases, it will be necessary to develop systems that allow control on a wider, faster scale. Many tech companies are already introducing measures to improve this, but there is a long way to go.

Expect to see more extreme measures like Sam Altman's eyeball scanning technology or reverse paywalls, where publishers need to pay to verify before they can distribute content.



ROB STONE
HEAD OF Z3

USE OF DATA

AI will play a big role in the future of data and personalisation. Newspapers had to pick a headline and stick with it. Online news outlets like the BBC already test multiple headlines as a new story develops, eventually pushing the ones that get the most clicks and engagement.

AI can take things to another level in terms of scale, serving a unique, personalised headline to millions based on everything from age and education level to income and political beliefs.

As technology continues to shift news consumption, the importance of quality, authenticity and the use of data will be key.

SO WHAT'S A BRAND TO DO?

The public's healthy appetite for news looks set to continue and while the medium and landscape may change, be mindful that many of the basic mechanics of reporting the news remain.

Social media platforms are very good at pushing the content you like, using complex algorithms and AI to deliver what gets the best engagement. In this context it's imperative to focus on producing fresh, original content.

People want fresh perspectives, representation and greater access. Telling your brand story in an honest, open and engaging manner is the first step. Technology will continue to evolve the news, and what appears outlandish today will soon enough be the new normal.

Be curious, remain informed and don't be afraid to try something different. Easier said than done, perhaps, but where technology is concerned fortune really does favour the brave.



DIRECT FROM THE NEWSROOM

Social media is increasingly the first point of contact and a significant catalyst for the news. But old-school, traditional journalists remain the spring from which most stories flow. So what's uppermost in their minds? We called up some friendlies to find out.

NAIL THAT ELEVATOR PITCH:

"There's been a lot of talk about 'pitching platforms' but in truth hardly any journalists have signed up for them so far. The best way to get hold of us is via email or a strategic DM on social media. Above all be quick - I haven't got time to trawl through your email looking for the story. You wouldn't believe how many pitches we get, and that number is only increasing with every passing year. Serious hard news - wars, the economy, political turmoil - are filling up the airwaves and column inches, leaving less and less room for brand stories. It's never been more important to craft a compelling elevator pitch." - *BBC News*

DON'T OVERDO THE BRANDING ON TIKTOK:

"When we are creating content for our social channels, the key is to make the brand presence incidental. Pitch videos which are more about influencers - real people - and we will happily tag your brand on to that. Sometimes we might broaden the angle of your material, so it doesn't appear like an ad. Also consider inviting our digital journalists to your events and campaign activations - we are always looking for content and you never know what might come of it." - *Daily Mail TikTok producer*

PLAN YOUR SETUP:

"Studio interviews almost always look better and are often preferred. But sometimes your story might be very visual. In which case, doing the interview from the shop floor or an exhibition hall will look a lot better - and when you nail a remote interview, it always looks amazing. If that's the case, you need to be able to set up a remote call with a dedicated 4K camera (no integrated iPad or laptop cameras), a dedicated mic (AirPods can work effectively for this), one or two ring lights, and an internet connection via Ethernet or superfast 5G. Remember to frame you guests nicely - don't have them looking down at the camera, and make sure the Zoom background is as visually appealing and relevant to the story as possible." - *Ian King Live, Sky News*

GO GREEN FOR PRESS TRIPS:

"Something to consider when you're organising a press trip - I turn down many of these as I rarely fly for eco reasons. I was impressed when a press trip invite landed in my inbox offering to pay for journalists to travel by train or other means of public transport. If you're going to invite hacks abroad, at least offer to cover alternatives to flying. There's lots of talk from companies about how they're trying to be green, and a lot of it is greenwashing. But actually stepping up in this way proves otherwise." - *The Guardian*

USE A SPOKESPERSON WHO KNOWS THEIR STUFF:

"What makes a good voice is someone that seems to really know their stuff, who you can tell is smart and clued in. They won't just be inserting themselves into a story relevant to their company, they'll be credible and have expertise on the topic." - *Financial Times*
stepping up in this way proves otherwise." - *The Guardian*



KEY CALENDAR DATES

Just some of the moments we can expect to drive the news agenda in 2024.

14-19 JANUARY

World Economic Forum Annual Meeting in Davos

8 MARCH

International Women's Day

14 MARCH

One year since the release of OpenAI's ChatGPT-4, regarded as the instigator of the mainstream AI boom

31 MARCH

Scheduled date for the Ukrainian presidential election, which will not be held if the Russian invasion of Ukraine continues

22 APRIL

Earth Day

6 MAY

One year since the coronation of King Charles III

JUNE

Pride Month

6-9 JUNE

European Parliament election, the first to take place without the UK involved, against the backdrop of a rising support for far-right parties

14 JUNE - 14 JULY

UEFA European Football Championship (EURO 2024) in Germany

26 JULY - 11 AUGUST

Olympics in Paris, France

28 AUGUST - 8 SEPTEMBER

Paralympics in Paris, France

7 OCTOBER

One year since the coordinated attacks by Hamas on Israel

10 OCTOBER

World Mental Health Day

OCTOBER

Black History Month

5 NOVEMBER

The US presidential election

18-19 NOVEMBER

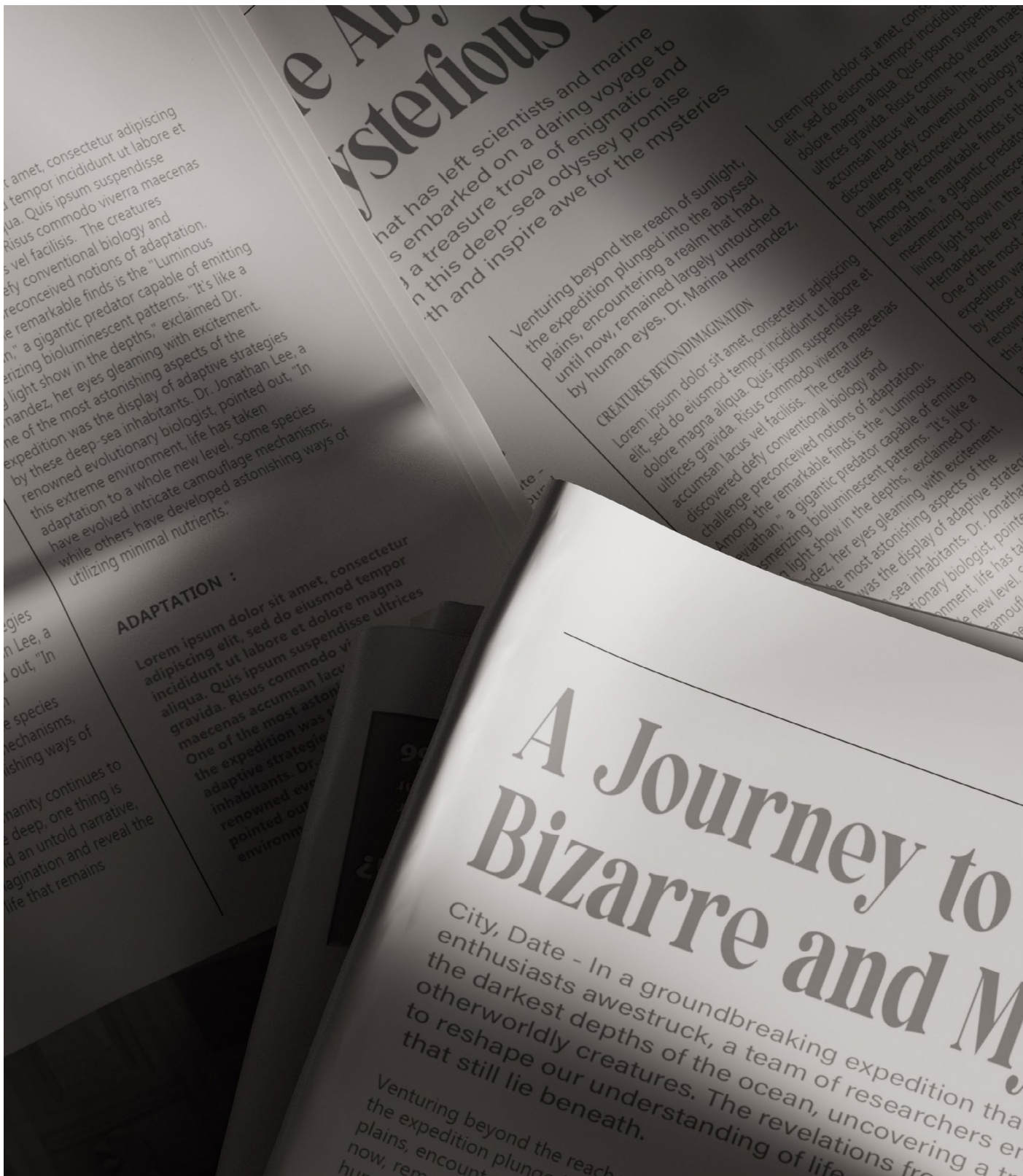
G20 Summit in Rio de Janeiro, Brazil

NOVEMBER

The UN Climate Change conference (COP29), exact date and location tbc

17 DECEMBER

Latest date for UK Parliament to be dissolved ahead of the general election, which must be held no later than 28 January 2025



If you would like to be talked through the insights, have any questions, or want to hear more about how we can help you navigate the changing media landscape, please get in touch.

Richard Price, Editorial Director
Richard.Price@zenogroup.com