



Media and Digital Trends 2022

PORTER
NOVELLI 



Contents

Executive Summary

Earned Media landscape

- Media fights to regain public trust
- Another challenging year for journalists
- Re-engaging fatigued audiences
- Ongoing diversification of news content
- The rise of subscriber and niche platforms
- The pursuit for Gen Z

Digital Media Landscape

- Always-on data strategies fuel personalised experiences
- Recommendations for organisations

Recommendations for organisations



Executive Summary

Executive Summary

2022 continues to see the media landscape in a state of flux and searching for answers to the big challenges facing the sector for the last few years - largely with regards to its purpose and sustainability.

From the Covid-19 pandemic, to global warming and the Russian invasion of Ukraine, a relentless news cycle, coupled with polarised debates about politics, identity, and culture have taken their toll on both journalists and audiences, leaving all involved feeling burnt out and increasingly disengaged. One of the key challenges for news organisations will be to re-engage those who have turned away from news in recent years, while building deeper relationships with more regular news consumers.

Meanwhile, digital transformation and the rise of the creator economy means the old maxim of content is king continues to rule. Today, news organisations are intensely competing, not only with rival news brands, but also with brands and individuals on social media platforms, for audiences craving more personalised and authentic content based on their interests and values. In order to succeed, these organisations will need to create stronger connections with their audience and offer them options to consume content how they want, and when they want.

These seismic changes also offer businesses opportunities to improve their visibility and brand equity, both with journalists

and customers, by showing that they are tapped into important news and cultural conversations and can offer stories that can be told in a simple, compelling and authentic way across multiple platforms.

However, while good content is important, audiences are already experiencing information overload in their daily lives, which is pushing many toward consuming less, but more authentic, value-added content on the channels they prefer and trust. Therefore, the big challenge for businesses and brands will be in identifying how and where they can best show up to make the biggest impact with their audiences.

With advances in the digital space continuing at pace, 2022 will see businesses and brands continuing to try and solve this conundrum through ongoing experimentation with different platforms, partnerships and technologies that deliver more personal, authentic and rewarding experiences. The formula for success here is far from established, so businesses and brands will need to work even harder to understand their audience, what they want from their relationships with businesses, and how to keep them coming back for more.





Earned Media Landscape

Media fights to regain public trust

After another tumultuous year, public trust in the media and freedom of the press continues to remain front and centre for news outlets worldwide. The coverage of the pandemic – and latterly the war in Ukraine – has helped to restore some confidence and cast the news media in a new light as a trusted source of information.

However, over the previous few years the sector has been struggling to rid itself of stoking bias through highly emotive partisan content and spreading ‘fake news’. This line of attack, first propagated by former US President Donald Trump, has resulted in journalists receiving regular – and often vitriolic – abuse from populist politicians, figureheads and individuals on social media. Today, dissemination of misinformation and fake news across both traditional and social media remains a powerful tool employed by individuals and state actors – as evidenced during the Russian invasion in Ukraine - to advance political and financial goals, further polarising public opinions and exacerbating political and social instability in the process.

To counter this abuse and increase trust, many news outlets are looking to tone down highly partisan content in favour of more constructive reporting and commentary, as well as tightening up rules for social media use for its staff.

Outlets have vowed to do more in 2022 to help counter the spread of misinformation,

particularly across social media, through high quality, accessible fact-checking and explainer content. For example, BBC presenter Ros Atkins became a breakout star last year with his short, evidence-based explainers on social media. Atkins’ video on the Downing Street Christmas parties was watched over 11 million times in nine days.

Elsewhere, a new start-up, The News Movement, founded by former executives from Dow Jones and the BBC, plans to counter misinformation online by creating accessible text and video explainers for TikTok, Instagram and other social media outlets.

Whether the Ukraine war will herald a re-evaluation of journalism’s role in civic society is open to debate. Regardless of how the crisis plays out, journalism will continue to be a central cog in the Information Age it also breathlessly covers.





Another challenging year for journalists

It's been another punishing year for journalists, with reporters juggling multiple beats with demanding workloads and pressing deadlines, all set against the backdrop of ongoing efficiency cuts. Recent research found that the average journalist covers four beats - compared to three in 2021[1] - and filing seven or more stories per week; 33% say they file 10 or more.[2] Understandably, many have had to pick up more health stories, with around two thirds (61%) covering more stories about Covid-19/health and wellness due to the pandemic.[3]

Furthermore, in the ongoing war for readers' attention and the availability of detailed audience metrics, journalists are increasingly changing the way they write and promote stories, with those that are likely to generate the most traffic to the site - providing revenue to the publisher and job security for the reporter. In February 2022, Reach PLC, a large regional publisher in the UK, set traffic targets for all of its journalists with requirements on those underperforming to do more to increase their numbers or face repercussions.[4]

This increased and incessant workload over the last two years, coupled with regular attacks by politicians and on social media, has been compounded by the relative isolation of working from home. While many news organisations plan to get workers back into the office this year - albeit as part of hybrid working plans - there are concerns over the potential impact remote working will have on the creativity, collaboration and communication between its staff.

Recommended actions

Minimise complexity, and provide simple explainer content where necessary

Approach media material writing with an SEO/SEM lens

The average journalist covers 4 beats in 2022 - compared to 3 in 2021 - and filing 7 or more stories per week

2021



2022



Re-engaging fatigued audiences

It's not only journalists who have been feeling the pressure. The 2022 Reuters Digital News report, published before the war in Ukraine, found that audiences also often feel overwhelmed by the amount of news – compounded with more grave topics, such as Covid-19, political tensions and climate change. Many respondents said they now regularly avoid the news because it is too depressing.[2] The challenge for publishers is how to re-engage people who came in for Covid-19 but who have since gone away.

News organisations face challenges on two fronts – creating a more inclusive and supportive workplace for its staff while also finding ways to re-engage disenchanted audiences who have turned away from news and build deeper relationships with more regular news consumers. However, ongoing reporting on Covid-19, the political cycle, such as the US midterm elections and reporting on climate change, may make this easier said than done.

Recommended actions

Leverage growing appetite for good news stories with more light-hearted and relatable news content based on your target audience interests and values



Ongoing diversification of news content

Social media and the creator economy have challenged news outlets to think more dynamically about the way they report and deliver content. Over the last few years, news outlets have expanded the range of products, formats and programmes they offer in order to attract and retain core audiences, and this is likely to continue even further in 2022.

According to Reuters, four in five surveyed publishers plan to invest in podcasts and other digital audio, followed by newsletters (70%), and digital video formats (63%).^[5]

Specifically, publishers say that they will be putting more resources into podcasts and digital audio (80%) as well as email newsletters (70%), two channels that have proved effective in increasing loyalty as well as attracting new subscribers. By contrast just 14% say they'll be investing in voice and just 8% in creating new applications for the metaverse such as VR and AR.

These loyalty-forming formats will continue to grow but, with over three million different

podcast shows on Spotify, is there currently too much supply over demand? With the data telling publishers that these products build connections and reduce churn, expect news outlets to continue to refresh and iterate them as a result. The increased complexity of stories such as Covid-19 has led to a renewed interest in explanatory, often data-rich, online formats.

In addition, facing increasing competition from content creators on social platforms, news outlets will continue to trial new formats with star journalists at the forefront, such as newsletters and specialist content.

Recommended actions

Explore media partnerships with media brands that align with your values and reach your key audience

Proactively identify evolving media opportunities, such as appearing on podcasts, webinars and social media Q&As - making sure you have spokespeople available to put forward

4 in 5 surveyed publishers plan to invest in podcasts and other digital audio, followed by newsletters (70%), and digital video formats (63%)



80%

Podcasts



70%

Newsletters



63%

Digital video formats



The rise of subscriber and niche platforms

More publishers plan to push ahead with subscription or membership strategies this year, with the majority of those surveyed (79%) saying this will be one of their most important revenue priorities, ahead of both display and native advertising. At the same time, almost half of outlets (47%) worry that subscription models may be pushing journalism towards serving richer, educated audiences and leaving under-served and vulnerable communities behind.[6]

From an audience perspective, publishers will also have to find a balance to bringing in revenue while ensuring audiences – already suffering from news fatigue and reaching a saturation point – don't decide to go elsewhere.

One opportunity available to them is appealing to high interest groups with extensive news and feature content. In the UK, Tortoise Media has become one of the fastest growing news organisations, with a community of more than 110,000. Tortoise focuses on slow news and deep-dive investigations which aim to provide its members with a greater understanding of the context behind news stories. The Athletic, a subscription-based sports website offering in-depth sports news and analysis, has enjoyed rapid growth over the last year, resulting in the outlet being

acquired by the New York Times in January this year.

Outside of large-scale national media outlets, an interesting area of growth over the last few years has been that of local and niche communities. The Post and The Mill are weekly newsletters from Liverpool and Manchester respectively that cover intelligent, well-researched stories and offer an innovative business model for regional news. Furthermore, UK publisher, DC Thompson has claimed that niche podcasts have the potential to become a lucrative source of income. The company is seeing increasing revenue for its business-to-business shows through sponsorship, branded content and producing native series.[7]



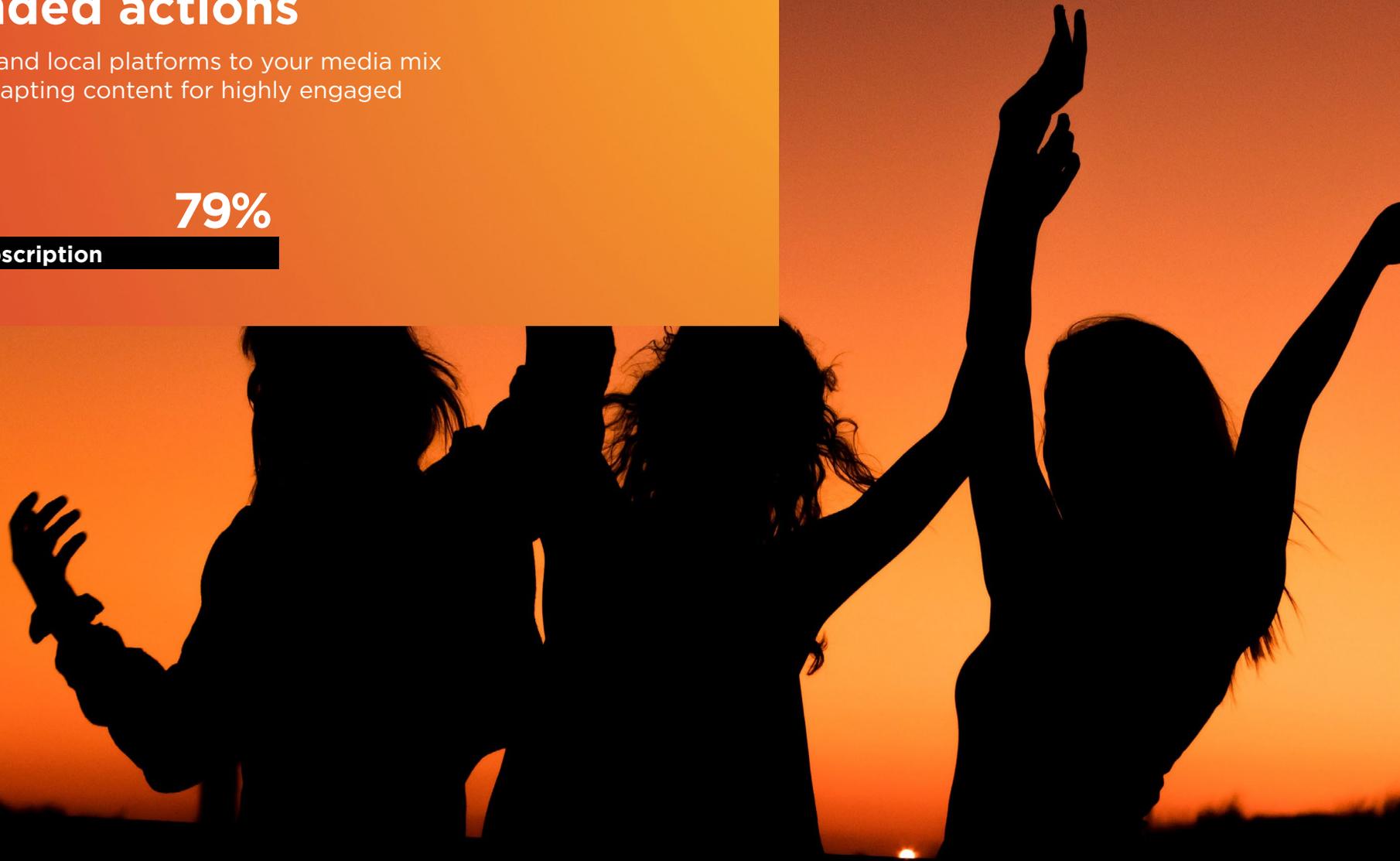
Recommended actions

Consider adding niche and local platforms to your media mix and, where possible, adapting content for highly engaged audiences



79%

Plans to push 2022 subscription





The pursuit for Gen Z

In addition to retaining core audiences, news outlets are eager to build relationships with under-35s. This is a demographic that generally has less loyalty to traditional news sources and which prefers to access news via social media and aggregators.

Recent research in the United States found that almost two thirds (59%) of Gen Z and Millennials keep up with news via video compared to 41% who prefer text.

[8] Social media platforms like WhatsApp, Instagram, Telegram and TikTok have continued to attract more young people over the past year, with celebrities and influencers increasingly chosen as go-to sources of information on a range of topics, including health, racial equality, social justice and climate change.

Half of surveyed publishers plan to put more effort into Instagram, TikTok and YouTube and focus less on Twitter and Facebook.[9] The success of TikTok in particular has seen some media outlets invest heavily into short-form video

content creation.

In 2021, TikTok overtook Google as the most visited website on the internet for the first time, which just shows the clout that social media platforms now hold.

Beyond how they get their news, news outlets are having to reassess the topics and tone of the content they publish. Younger people generally have a strong appetite for coverage of a broader range of topics, such as arts and culture, activism, the environment and LGBTQ+.[10] Primarily, younger audiences are interested in human and personal stories that inspire their goals in life. While this kind of content is available, major news brands are having to reconsider how they can be more diverse and inclusive.

Recommended actions

Supplement traditional media materials with compelling, snackable content optimised for social media

Don't try to be everywhere; focus energies on channels that your target audience use

Don't be afraid to speak out on important issues, but ensure it is authentic and reflects the values and actions your company is taking

Two thirds (59%) of Gen Z and Millennials keep up with news via video compared to 41% who prefer text



59%

keep up with news via video



41%

keep up with news via text



A digital art installation featuring a dense, vertical rain of blue light lines. Interspersed within this light rain are clusters of colorful, glowing floral patterns in shades of yellow, pink, purple, and blue. In the foreground, several people are seen from behind, looking into the installation. Some are sitting on a low, curved structure made of light trails, while others stand and interact with the environment. The overall atmosphere is immersive and futuristic.

Digital Media Landscape

Always-on data strategies fuel personalised experiences

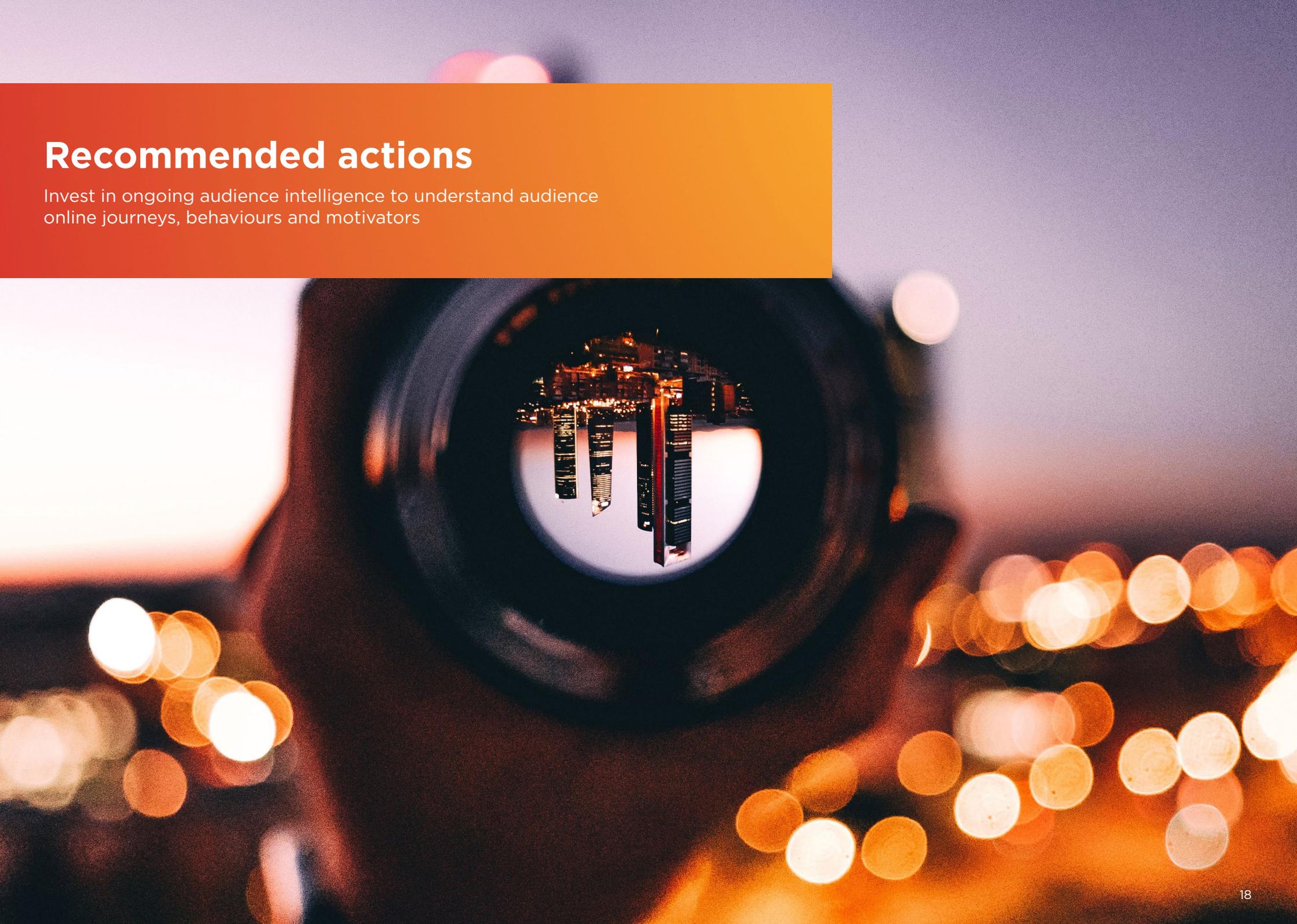
A 2021 KPMG report on corporate data responsibility unsurprisingly found that organisations are at odds with the general public. The survey found that 68% of consumers said they're concerned about the level of data being collected by organisations. At the same time, 70% of business leaders said they increased collection of personal data over the last year.[11] The increasing consumer concerns over data privacy have resulted in Google's elimination of third-party cookies. Meanwhile, changes to Apple's Identifiers for Advertisers (IDFAs) - a method of tracking user behaviour across online and offline sites for advertising purposes - has handed users more control on the level of data companies can collect and who can track them.

The loss of cookies and other identifying information has driven companies towards smarter, first-party data strategies. Getting closer to audiences, developing precise insights, and generating more bespoke experiences are key to unlocking communications opportunities. While audiences are concerned about data privacy, they are nevertheless willing to share their data to create a more personalised experience. Moreover, they are still more likely to shop with brands that provide offers and recommendations which are relevant to them.[12]



Recommended actions

Invest in ongoing audience intelligence to understand audience online journeys, behaviours and motivators





Influencers become gatekeepers to premium audiences

In 2022, the Influencer Marketing Industry is set to grow to approximately \$16.4 Billion.[13]

While influencer marketing offers cost-effective user generated content and targeted amplification, marketers and communicators regularly report measuring ROI as their number one challenge.

Audience intelligence and data will be integral to informing and evaluating smarter influencer strategies and qualifying partnership success. Companies will have to go beyond the “traditional” influencer data and metrics (reach, resonance and relevance) to demonstrate how exposure to influencer content actually contributes to lifts in sales, brand health, or even reputation/perception.

Recommended actions

Explore innovative partnerships with influencers that align with your brand values and goals

Establish robust measurement processes to track changes in consumer behaviour linked to marketing and sales objectives

In 2022, the Influencer Marketing Industry is set to grow to approximately \$16.4 Billion

 **\$16.4 Billion**
2022





Recommendations for organisations

Recommendations for organisations

1.

Think beyond the press release

Increasing time and resource pressures present an opportunity for organisations to strengthen relationships with journalists by better understanding and meeting their needs. With journalists covering several beats and stories per week, they're looking for organisations who understand their needs and can provide stories that are compelling, concise and work across different formats.

Organisations should ensure they are providing news stories that anticipate or speak to the current news agenda and deliver high-quality information in an easily-digestible way. Given the pressures of the 24/7 news agenda, organisations should think of their story beyond the press release, providing multimedia materials – such as animated or video content – and expert commentary that can provide a journalist with multiple angles that will continue to drive conversation across digital channels beyond the initial story publication.

As publishers increasingly prioritise digital first for news stories, businesses should ensure their media materials are optimised for search to increase their chances of success.

2.

Know your audiences and key drivers

The fragmented and ever-changing media landscape means that organisations have to think smarter and work harder to get their messages to the right audience. In order to improve their success rate, organisations must develop a deeper understanding of their audiences, their motivations, interests and pain points, and identify prime opportunities to connect with them across their online and offline media engagements throughout the day.

More than ever, organisations will need to build and maintain a detailed understanding of their audiences, made more challenging by the phasing out of 3rd party cookies. In tandem, they must deliver well-produced, high-value content that resonates and builds trust with audiences, and encourages them to opt-in to receiving content in the future. Businesses should start experimenting now with different strategies to help them understand the budget required, reach and performance they can expect in future.

3.

Use more agile storytelling

When browsing online, the audience's ultimate goal is a seamless online experience. While there are no one-size-fits-all approaches to reaching a target audience, organisations should consider how they can tell their story through the medium a platform provides, rather than forcing the audience to their own site. Organisations should tailor their storytelling to formats that are native to mobile and social platforms as well as incorporating these ideas into their owned channels. Visual formats, as well as on-demand audio podcasts, can be effective ways of attracting audiences as they reflect modern consumption habits, predominantly accessed and shared via mobile.

Outside of mainstream media outlets, organisations could boost brand awareness and equity by investing energies into more engaged communities through specialist news and community platforms, such as specialist Slack channels, Facebook groups, Subreddits and web forums. Here, they can develop innovative partnerships and underline their credentials as a dedicated contributor to the communities they are trying to talk to.

Businesses can also play a vital role in re-engaging audiences through a robust content marketing strategy, experimenting with content themes to entertain as well as inform audiences.



4.

Demonstrate your organisation as a positive force to inspire action

Companies are now expected not just to return profits but to make a significant social impact – and to back up their words with tangible action. Organisations that demonstrate a strong purpose and point of view on the world are perceived as being more relevant to their audiences. This expectation comes from investors, customers and the communities they work with, as well as their own employees. Being responsive to the wider world and being purposeful is now not CSR, it is a licence to operate.

While the decision to communicate on which issue will depend on several factors, organisations should not shy away from serious or difficult topics, but rather should talk about them authentically while providing solutions on what they, and your audiences, can do to take action.

5.

Embrace the power of partnership

Partnerships are an important tool for driving visibility and credibility, as well as for reaching new audiences. Due to the nature of their work, NGOs, charities and social enterprises are valuable partners for driving awareness and positive sentiment around an issue, and often provide much richer and diverse stories for traditional and social media.

The concept of paying to reach a bigger or more targeted audience on social media or through search engines is well established, but paid media partnerships is an area that is continuing to grow as news outlets develop more sophisticated offerings. When aligned with a relevant media outlet, these partnerships can often deliver significant boosts to brand awareness and credibility and should be considered when planning integrated campaigns.

While the influencer market will continue to evolve, organisations should maintain an “always-on” approach to identifying and building relationships with relevant organisations and influencers that share their values and can help them connect with new audiences in innovative and meaningful ways. If done right, these influencers will build a strong positive connection to your company and its goals, building trust levels among their wider audiences.



References

- [1] Muck Rack. The State of Journalism 2022.
- [2] Cision. 2021 Global State of the Media Report.
- [3] Muck Rack. Ibid.
- [4] New Stateman. Why clickbait journalism backfires on local papers. 11 March 2022.
- [5] Reuters Digital News Project. Journalism, Media, and Technology Trends and Predictions 2022.
- [6] Ibid.
- [7] Press Gazette. 16 March 2022.
<https://pressgazette.co.uk/why-niche-podcasts-can-make-money/>
- [8] YPulse. News Consumption and Trust Report, 2021.
- [9] Ibid.
- [10] Reuters Institute for the Study of Journalism, Oxford University. 'How Young People Consume News and The Implications For Mainstream Media'.
- [11] KPMG. Corporate data responsibility: Bridging the consumer trust gap.
- [12] Accenture. Making It Personal. Why brands must move from communication to conversation for greater personalization. Pulse Check 2018.
- [13] Influencer Marketing Hub. The State of Influencer Marketing 2022: Benchmark Report.





For further information or to discuss earned and digital media strategies, please contact sarah.shilling@porternovelli.com

