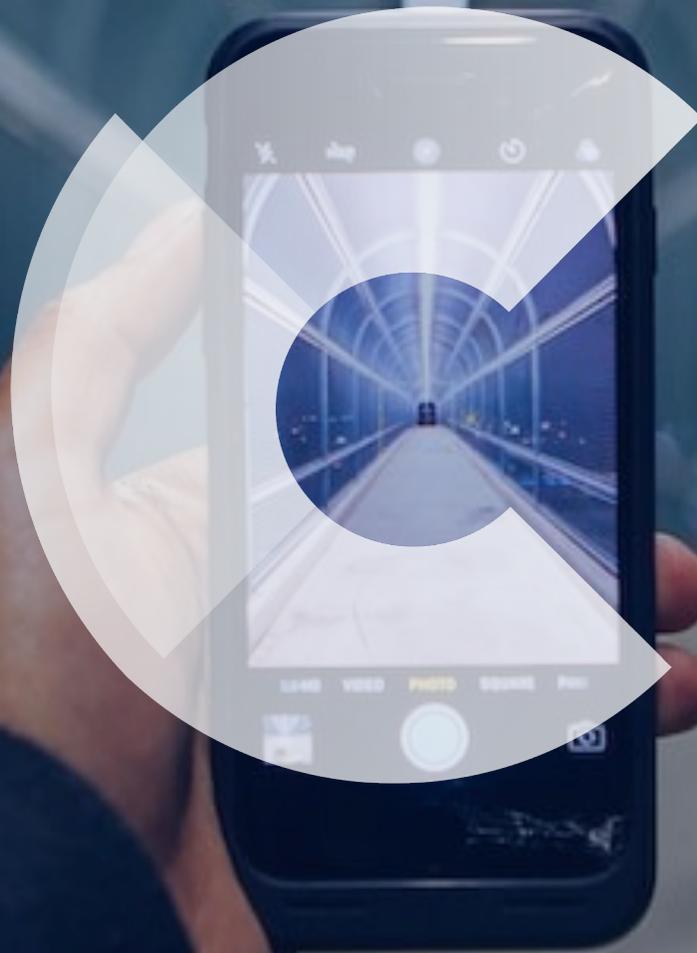


Designing for the Now and Next: 2024

Carat's media predictions
for the year ahead



Foreword

As we gear up for 2024, we have a lot to look forward to. We hope that The Olympics restore a feeling of global togetherness, that the end of the SAG-AFTRA strike will immerse us in more ground-breaking content, and that AI will make media more personalized and useful.

But we can't ignore the warning signs ahead. Going into a year of major elections across the globe, the increase of consumers getting news from social media combined with the rise of misinformation is causing a major trust crisis.

The New York Times recently published a perspective that even as economic indicators like unemployment and inequality seem to be softening, media indicators

point toward a more negative consumer outlook.¹ Videos about the "Silent Depression" have gone viral on TikTok² and consumers are using social media to express deep-seated angst about their individual circumstances.

In fact, Forrester predicts that 2024 will see a decline in trust for governments and businesses.³ **Empathy is key to restoring trust. It's up to us as marketers and brands to help restore hope, simplicity, and balance to consumers as they navigate a tumultuous year ahead.**



Joanna Hawkes

EVP, Head of Strategy
Carat US



Our predictions for 2024



Overstimulation in the Attention Economy



The diversification of entertainment



The sports landscape modernizes



The online safety crisis



People seek greater control

Overstimulation in the Attention Economy

People are more connected than ever, and at the same time feel overstimulated. As consumers strive for more calm, a storm of major events – like the US election and Paris Olympics – will emerge and overwhelm their content cues, and as such, consumers will be more deliberate with how they spend their time in media.



Author

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Trends

- Selective consumption
- Super-charged passions
- The return of long form
- In search of shortcuts

Overstimulation in the Attention Economy

Selective consumption

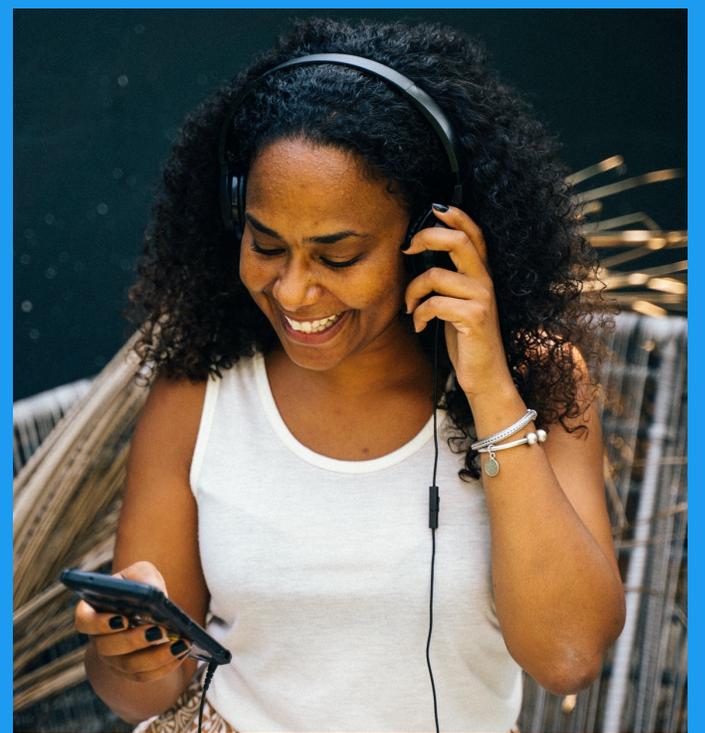
Stuck in choice overload, consumers are gravitating towards platforms that deliver high value and lowering their engagement on those that do not.

Social video is expected to plateau by 2025,¹ signaling a lessening appetite for shortform algorithmic content. While social platforms are great for discovery, the majority of consumers (64%) now view it as a pastime versus those who feel they can't live without it (19%).²

While shortform content satisfies an entertainment fix, consumers are spending more time with channels that deliver on high-quality, in-depth information. Consumers are more willing to pay for premium content as seen in the continued growth of OTT subscriptions³ and digital audio has the highest time spent growth over the last 10 years.⁴

While digital audio is still largely untapped for advertisers, the platform continues to see upward momentum (three-quarters of adults regularly listen) with significant gain attributed to podcasting (up 6.9% YoY and expected to rise to 56 minutes per day by 2025).⁴

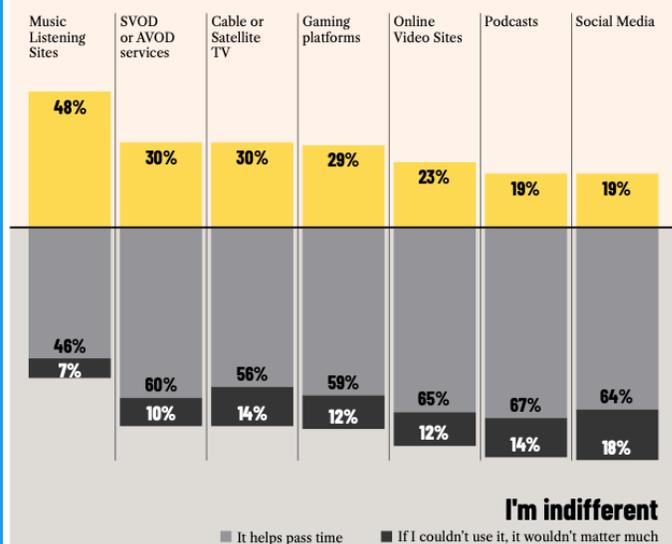
This shift nods to the ineffectiveness of algorithms. We expect to see consumers move from passive algorithm-driven content feeds to active participation in their content selection.



How do I pass my time?

I use it

■ Can't live without it



Q: Which statement do you agree with most for each on this list?

The Duality of Media, Carat + Vox Research study

VOXMEDIA | CARAT

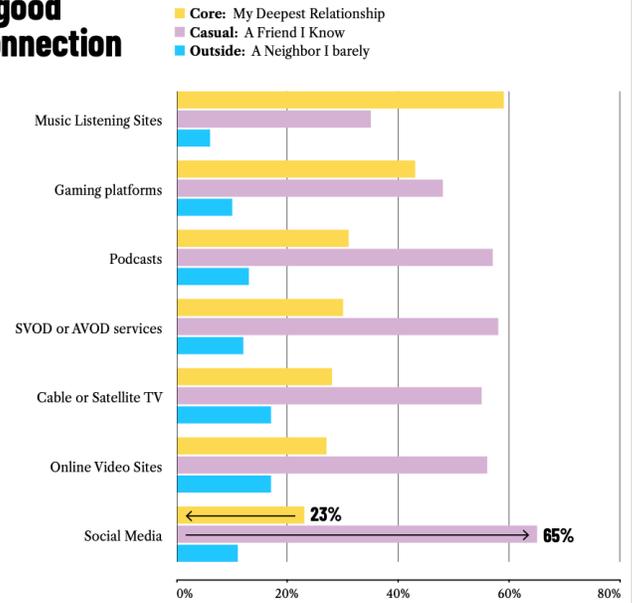
Super-charged passions

A decade ago, human attention was compared to that of a goldfish, and it's been the hook of too many articles on engagement since. But it's difficult to blame attention when 70% of Americans binge-watch TV shows (90% of Millennials)⁵ and are using their mobile phones as an extension to the main event (71% of people use their phone to look up something related to the content they're watching, and 41% are texting friends to discuss it⁶).

The internet has supercharged passions and transformed the media landscape. When asked how to describe their relationship with media, consumers responded that they feel the greatest connection with passion-based channels like music, gaming, and streaming, while they feel less of a connection with algorithm-driven channels like social and OLV.² Passions will continue to transform and permeate culture like we've seen in the economic power of Taylor Swift in her Eras Tour and presence at NFL games, and Barbie becoming the highest grossing film in Warner Bros. 100-year history.

This also holds true for their relationship with brands, with 55% of consumers planning to take a fewer, better approaches when it comes to their brand relationships.⁷ Prioritizing connection through shared passions is how brands will break through. In the coming year, we'll see more brands take a page from the books of premium players, niche influencers, and powerhouse talent like Person of the Year Taylor Swift.

A good connection



Q: If you had to describe your relationship with each, how would you describe it. Select one answer for each on this list.

The Duality of Media, Carat + Vox Research study

VOXMEDIA | CARAT

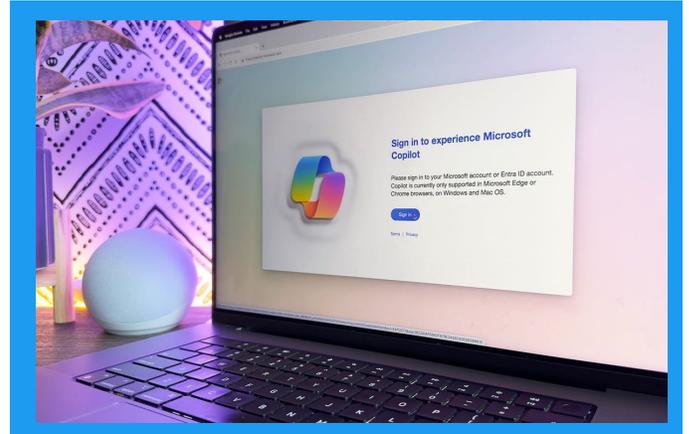
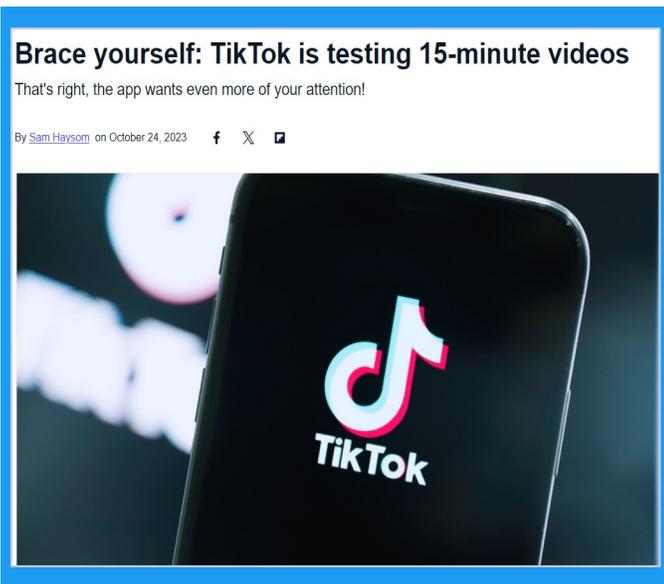
DEC. 25, 2023



The return of longform

Shortform has been the showstopper largely due to the explosion of TikTok and wide-spread adoption of Instagram Reels. Almost every major article will tell you that shortform will continue to reign superior in 2024.

While that's partially true, longform is poised to make a comeback as platforms fight to do it all. TikTok is currently testing the ability for users to upload 15-minute videos (up from 10 minutes⁸), while Instagram is reportedly making Reels longer to take on TikTok.⁹ Supercharged passions are driving longform growth as consumers seek out more in-depth content around their interests. In fact, we are already seeing over half of Gen Z watching longer versions of videos they discovered on shortform video apps.¹⁰



In search of shortcuts

With infinite products and brands to choose from, consumers may have the upper hand, but they are desperately looking for shortcuts in their decision making. Platforms like Amazon and Reddit are highly sought after for a quick unfiltered view, with 47% of consumers citing they sort reviews by lowest star rating and 50% start their shopping journey on Amazon.¹¹

In 2024, AI will experience a wave of accelerated adoption as 90% of consumers embrace solutions that give them greater personalization.¹² We've already seen momentum here in the way AI-powered Bing has transformed search by combining language and context to make it more like a reasoning engine and how Snapchat is leveraging AI to create tailored experiences designed to resonate with individuals and enhance their connection to the platform.¹³



How brands can get involved

- Amp up investment in more purposeful, leaned-in environments where audiences are actively engaging with content.
- Consider how connecting through shared passions with authentic storytelling can capture attention in more meaningful ways.
- Understand the appetite for content length and format – shortform engagement unlocks opportunity for longform immersion to move them through their journey.
- Help consumers sort through the clutter – a quick interaction can be just as powerful when it's giving the information they're after.

The diversification of entertainment

Even as data improves targeting capabilities, consumers are embracing content that enriches their worldview. The diversification of content platforms and sources, matched by an increase in global content consumption, will give rise to an entertainment landscape that is more representative of diverse voices and stories.



Author

Natalie Garcia
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Trends

- The video phenomenon
- The global content marketplace matures
- The creator economy gives rise to diverse voices and stories

The video phenomenon

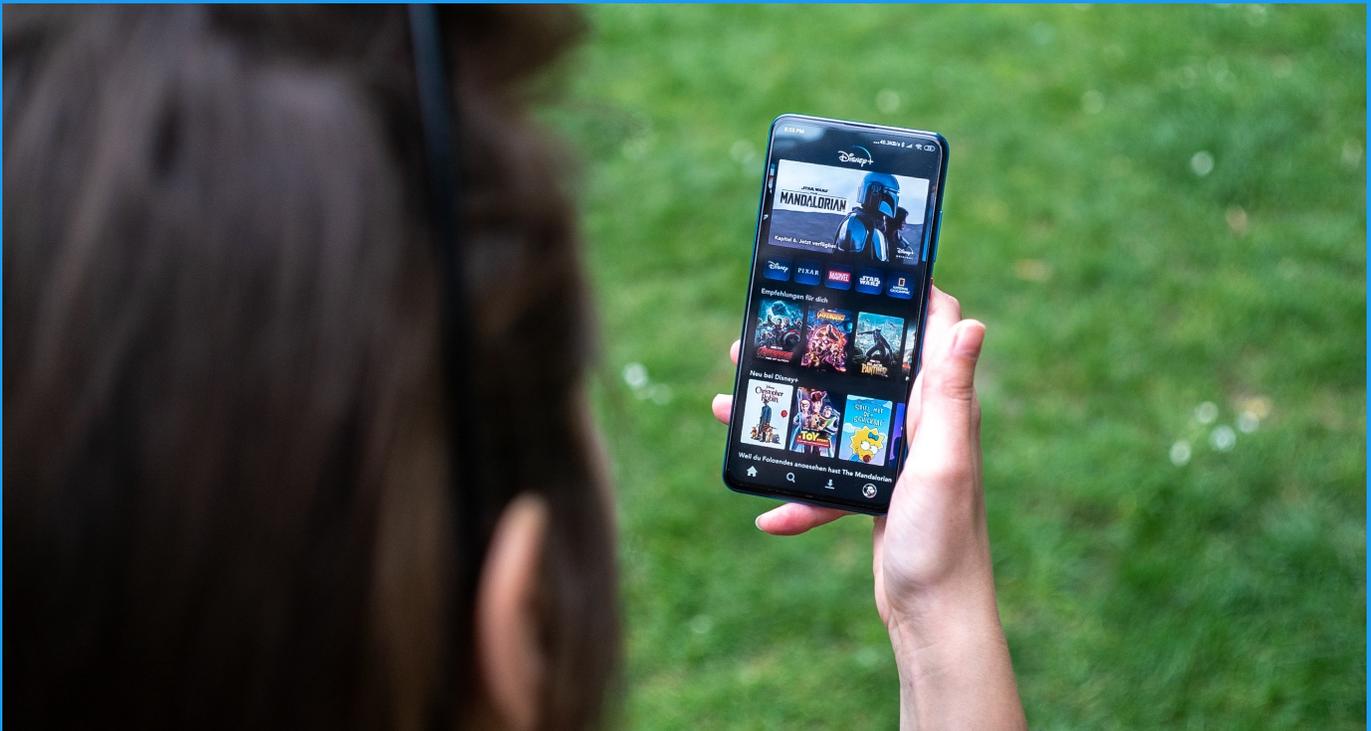
The rise of escapism during uncertain times has made consumers focus on entertainment to avoid thinking about unimaginable global health issues, unpredictable finances, and unprecedented social injustice moments.

We have seen how the video content phenomenon has made social media platforms such as TikTok and subscription-based video streaming services home to the new generation, becoming spaces for self-expression, cultural and social engagements, even entrepreneurship.

While TikTok reaches 1.67 billion users globally,¹ the subscription-based streaming services battle against each other, losing sight of how consumers like to be entertained. TikTok's phenomena set a faster, unlimited, always new, from everywhere standard for content.

Meanwhile, subscription video on demand (SVOD) streaming services have reacted to high churn rates and started to focus on ARPU and retention through a variety of strategies that include the password-sharing crackdown (led by Netflix²), new ad-supported plans, and the exploration of AI-actors to chase the social speed standards.

Video consumption shows no signs of slowing as more platforms race to incorporate video as a core offering. From YouTube's rise as a destination for video podcasting to Spotify's new partnership with Roku, the video landscape is increasing in breadth and diversity. The continued rise of video will give consumers a broader spectrum of perspectives and the chance to get entertained through new more diverse types of content, franchises, and voices.



The global content marketplace matures

We are experiencing a shift in entertainment as the global content marketplace matures. While cord-cutters are the norm for new generations, SVOD has the highest penetration in the US with 93% of households (120M).³ This vast reach comes with a cluttered competitive landscape that has led to a battlefield of differentiation in which content plays a critical role.

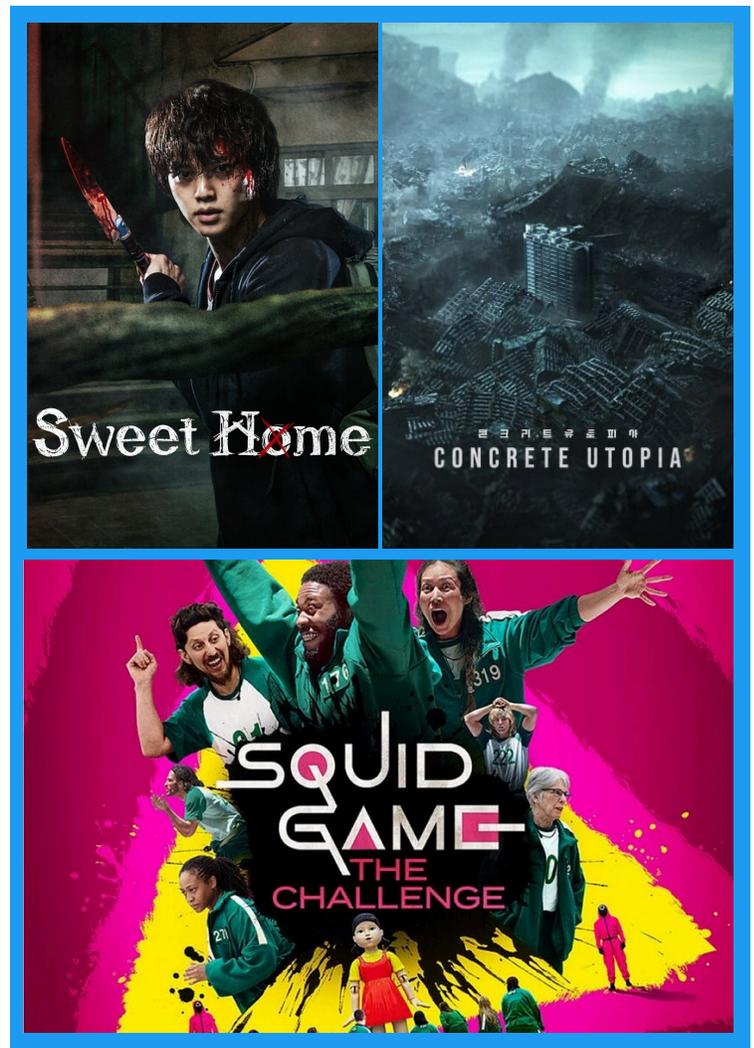
Quality and variety are vital factors to keep consumers. Streaming platforms are competing by leaning into a global content marketplace that has propelled the success of foreign content in the US. Investing in foreign content helps accelerate production and gain efficiencies, while resulting in more inclusive storylines that attract new generations that have higher minority and diverse representation.

Streaming platforms are experiencing success by including new storylines from foreign content, like Japanese anime, Bollywood films, South Korean programming (with its highest-ever global demand, according to Parrot Analytics⁴), British television shows (which account for 6% of the total demand for TV series⁵), Turkish series (24% higher demand compared to one-year ago⁶) and facing the challenge to streamline the localization of content to 40+ languages.

The globalization of content consumption is making the context of entertainment tap into a broader cultural spectrum for consumers who today are more diverse

than ever. Expansive global-sourced content has expanded their interest graphs, influenced trend culture, and reinforced niche relevance. Their worldviews are more flexible and are bridging cultures and generations.

Understanding and adapting to diverse regional viewing preferences and content tastes will be crucial for businesses aiming to attract and retain consumer attention.



The creator economy gives rise to more diverse voices and stories

We are in front of a blooming creator economy with 200 million creators worldwide worth \$250 billion in 2023, expecting to double in market size by 2027.⁷ It has found its accelerated growth in people buying products promoted by their favorite online influencers, looking for testimonials from like-minded peers, and providing brands with user-generated content. The maturity of the creator economy has multiplied the amount of content available and has helped evolve consumers' worldviews beyond their heritage and proxy community.

Creator content has risen as a new – and core – form of entertainment. Regardless of their motivation to use their skills, expertise, and creativity to attract and monetize an audience, creators answer consumers' desire for genuine authentic connection and more diverse stories.

The democratization of content stemming from the creator economy means consumers now have access to stories and voices that are more relatable and more representative of how they see themselves. In fact, younger Black and Hispanic consumers are most influenced by creators in social commerce.⁸

With the future of content creation becoming even more accessible with AI, and platforms coming out with new revenue-sharing models with creators, we are hoping to see an even more diverse - and thriving - creator economy.

“Underrepresented audiences are looking for someone who represents them. That's where I come in, because I gain their trust and then they actually are influenced by what I promote.”
-Vlogger and Musician, 500k+ social connections





How brands can get involved

- Embrace entertainment and all its various forms to connect more meaningfully with consumers, balancing the role of data/AI-led media with human perspectives.
- Evaluate global trends as opportunities to capitalize on attention; consider brand storytelling from a more global lens to enrich consumers' worldview.
- Invest in diverse creators to level the playing field and provide economic empowerment for more diverse stories to be told.



The sports landscape modernizes

Massive changes in media consumption have the sports industry making moves. Historically reliant on TV viewership, major sports organizations – including the NFL, the Olympics, and the NBA - are drastically evolving their approach to engage modern audiences on their terms.



Author

Harrison Awe
SVP, Strategy

Trends

- If you build it, will they come?
- The NFL: innovating with alternative broadcasts
- The Olympics: redefining for relevance
- The NBA: rebranding and reinventing

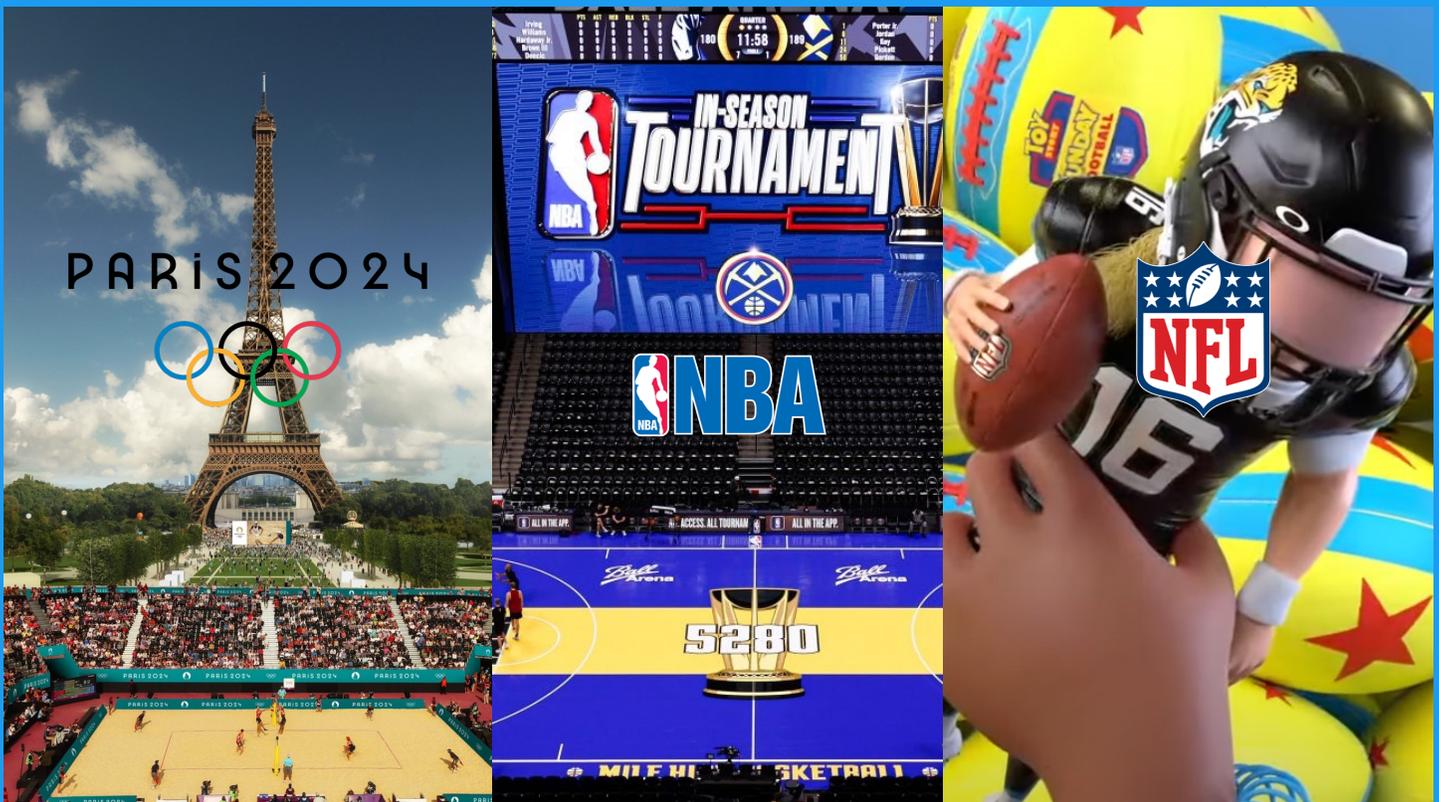
If you build it, will they come?

The largest sports institutions in the world have benefited from this historically rhetorical question. In an era where “TV is dead” narratives are passed around (seemingly) weekly – sports franchises like the NFL are the perennial exception.

In 2022, the league accounted for over 80% of the 100 most viewed programs, with the Super Bowl perched atop the list.¹ This year, the #2 slot will likely be owned by the 2024 Olympic Games, which averaged over 15MM daily viewers in the US,⁵ and three billion total viewers globally in 2021.⁶

On the surface, major sports institutions like these need not worry themselves with the trend lines of the channel their product operates in. Yet, various sports organizations are drastically evolving their approach to engage audiences.

Shifting everything from content strategy to distribution and partnerships, the Olympics, NFL, and NBA are powering a new landscape for sports media – future proofing engagement by meeting consumers where they’re at, both in media and mindset.



The NFL: innovating with alternative broadcasts

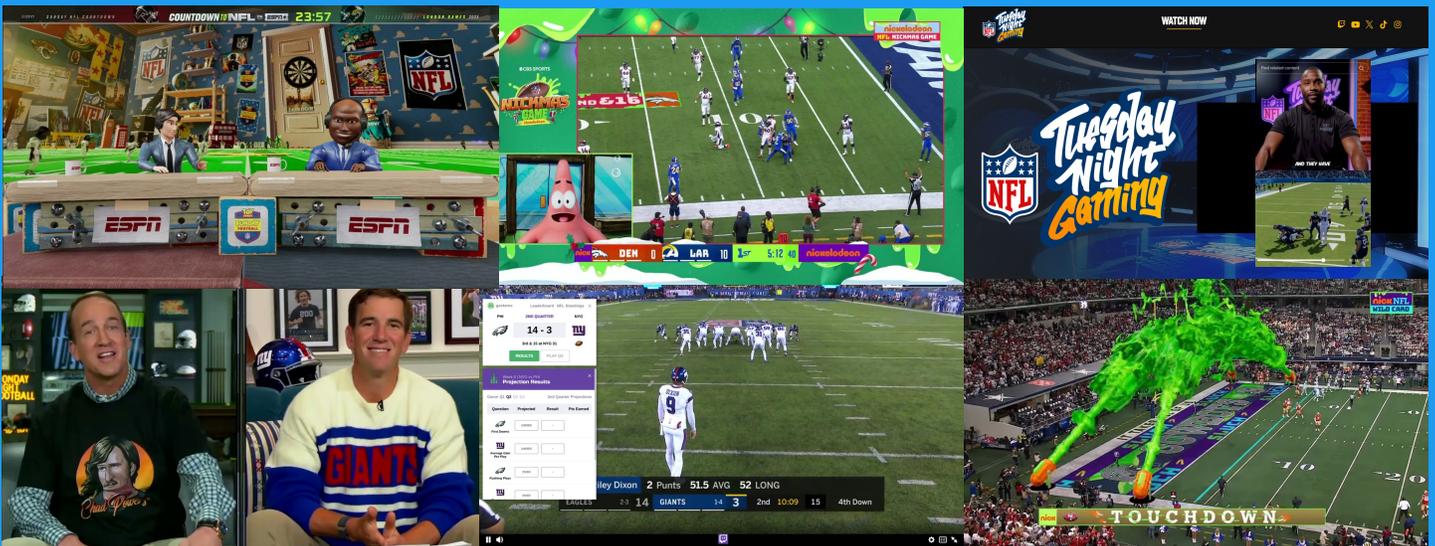
After spending much of this century building equity into four major televised tentpoles (Thursday Night Football, Sunday Night Football, Monday Night Football, and NFL Sunday Ticket/RedZone), the NFL is diversifying its approach. The organization has been busy creating distinct brand extensions – deepening engagement with current fans, while brokering partnerships with new age media companies to engage fans of the future.

Winning with alternative broadcasts

The NFL has unveiled a half dozen alternative broadcasts over the last two years. These broadcasts allow the league to test a spectrum of content strategies while simultaneously engaging a broader swath of key audiences on the platforms they love. On ESPN, the Manning brothers offer more traditional TV viewers expert “inside the huddle” commentary from the comfort of their living rooms and balance it with unscripted interviews of celebs and football

legends. On Nickelodeon, the league leans into the family network’s strengths, trading football credibility for credibility with kids. Patrick Star acts as sideline reporter and endzones are slimed after each touchdown. It’s silly, but significant. In doing so, the NFL becomes one of the first sports organizations to integrate AR technology directly into the consumer experience. They took these innovative efforts a step further this past season, debuting the very first live VR sports event.³ In partnership with Disney, *Toy Story Sunday Fun Day* moved beyond augmented reality, leveraging VR to recreate a live game that swapped players with toys from Andy’s room.²

Pair all of this with a modernized streaming distribution strategy – which now includes YouTube, YouTube TV, Twitch, and Amazon Prime, and gaming partnerships with Fortnite and Enthusiast Gaming⁹ – and it’s clear that the league sees the value of diversifying both the distribution of its product and the experience within each broadcast.



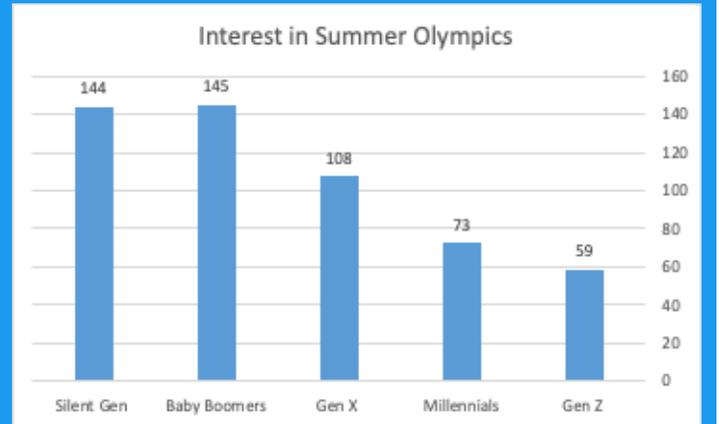
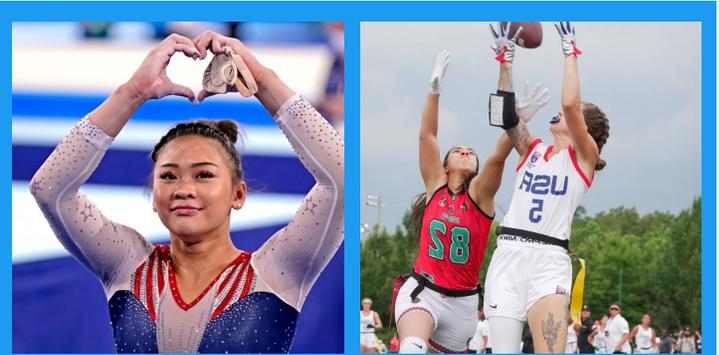
Summer Olympics: redefining for relevance

The Olympic committee plans to produce over 11,000 hours of content for this year's 2024 Summer games, with a major emphasis on more narrative-driven stories, athlete features, and behind the scenes content.⁷ The decision to spend less on-air time broadcasting live event coverage and highlights is a risky one. If doing so alienates even 1% of their core audience, that's 31MM less global views. But with the '21 Summer Games delivering 150MM less views globally than 2016, and an all-time ratings low in the US, it's a decision they feel confident making.^{5,6} Especially as streaming services like HBO and Netflix have repeatedly demonstrated how appealing narrative content is to viewers today.

Solving for the dip with social engagement

The drop in global viewership from 3.2B in 2016 to 3.05B in 2021 (nearly a 5% decrease in engagement) has been a strong warning to the Olympic committee.^{5,6} Especially as engagement trends forecast a growing disinterest with each new generation.⁴ The Olympic committee must modernize not just content, but the very definition of what constitutes as an Olympic event.

Sports like Skateboarding (added in 2021) and the projected inclusion of Flag Football (to be added in 2028) represent concise efforts to ensure the Olympic product reflects the shifting interest of future fans. Flag Football has quietly become one of the fastest growing sports globally – with more than 20 million participants worldwide.¹⁰ In the US, Gen Z is twice as likely to not only follow skateboarding⁴ – but do so online – a key battle ground for monetization for the Olympic committee moving forward.



The NBA: rebranding and reinventing

Maybe no league in the United States has been more willing to reconsider and reinvent itself and its product in the pursuit of future relevance than the NBA. From the first in-season tournament's sweeping changes to the look of the arena and on court branding that give the sport almost a video-game like feel, to their local merchandizing efforts such as City and Spanish language uniforms, to being one of the few brands to successfully integrate into the NFT landscape at its peak. The NBA is perpetually rebranding and reinventing, and this year will be a massive one for the organization to solidify the partners that will help them advance those efforts over the next ten years.

The advantage of going last

With the NBA's current streaming contract coming to an end during the 2024-25 season, the NBA finds itself in a truly rare position. They'll be finalizing the streaming rights contract that will likely last through 2035, and they'll be one of the last major sports organizations do so this decade.

With the NFL rights already locked until 2033, the NBA's agreement is the last major sports deal available for networks and streaming services looking to bring sports into their platform. John Skipper, former head of ESPN, said the new agreement could net the organization anywhere from 200% - 350% of their current contract.⁸

As the contract is solidified in the months to come, expect to see the league prioritize streaming and on-air partners that offer innovation as well as scale. As the league will be looking for opportunities to evolve and advance the NBA product and viewing experience through components like gamification, AR and VR technology, and gambling integrations.





How brands can get involved

- Don't rely on legacy models of connection; follow sports fandoms where they happen across the full media ecosystem and customize your approach for the context/platform/audience segment.
- Think about the role your brand can play in reflecting and championing a more modern and diverse sports landscape.
- With more ways to engage sports fans than ever before, ensure you have a reason to engage that adds value to the experience (does not interrupt or detract).

The online safety crisis

As we head into an election year of global consequence, media is facing an increased trust crisis. With AI exacerbating the spread of misinformation and social media under fire for its negative impact on mental health, experts and consumers are re-evaluating some of their media relationships and calling for more protective measures.



Author:

Joanna Hawkes
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Trends

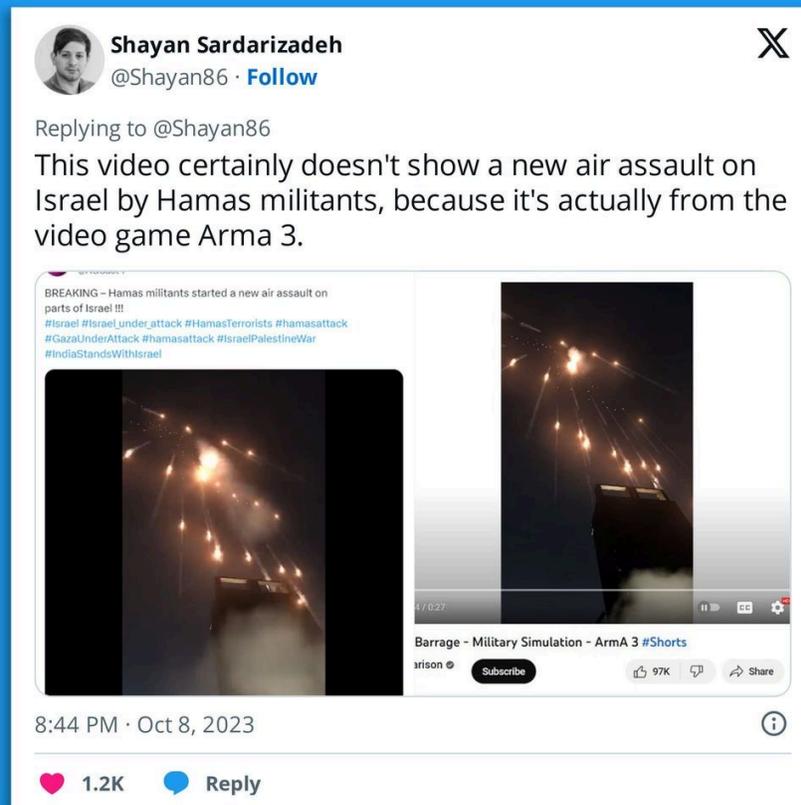
- Information inequity
- AI introduces a new threat
- The rise of youth activists

Information inequity

The share of consumers using social media as a news source has created greater inequity between trusted, quality news content and misinformation. 2021 marked a turning point in news consumption, becoming the first year that more global consumers turned to social media for news than turned to news websites/apps. Since then, the gap has widened by 12 points, with 30% going to social media for news and only 22% going to news sites.¹

Nearly one third of adults under 30 are now getting their news content from TikTok, making them more likely to hear it from social media influencers/personalities than from journalists.²

With content moderation teams impacted by the tech layoffs in 2023, researchers are concerned about the implications that the spread of fake news and misinformation will have on a major election year. Imagery and videos about the Israel-Hamas crisis shared across social media were found to be repurposed from other conflicts or worse, from video games.³ Even as social networks like Facebook attempt to pull back from news, concerns are high that not enough is being done, or fast enough.



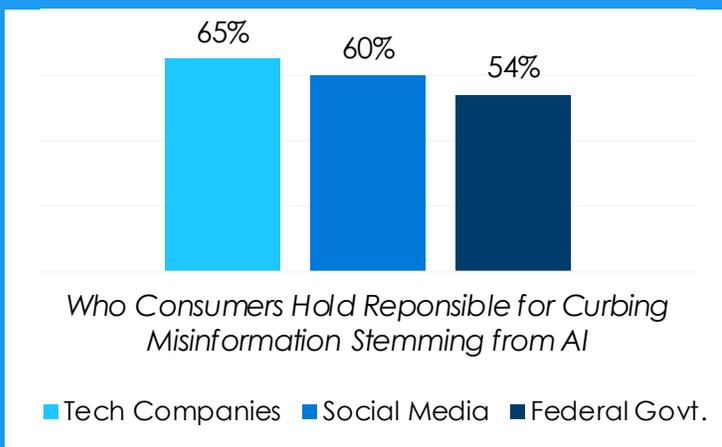
AI introduces a new threat

The rapid rise of AI has both disinformation researchers and consumers highly concerned leading into a consequential global election year. In a recent poll conducted in October, 6 in 10 Americans believe the use of AI will increase the spread of misinformation during the 2024 election.⁴

What's more, they believe that responsibility for curbing misinformation stemming from AI is shared by tech companies (65% support the labeling of AI content), and social media platforms (60% favor social media platforms banning false or misleading AI-generated images). A smaller majority favor the federal government banning all AI generated content in political ads (54%).⁴

In the US, both federal and state governments are scrambling to set up guardrails for AI – like the Biden administration's [Executive Order on the Safe, Secure, and Trustworthy Development and Use of Artificial Intelligence](#), and several US states such as Minnesota passing legislation to criminalize deepfakes aimed at hurting political candidates or influencing elections.⁵

Media has always had the power to sway elections, but we are facing a trust crisis of epic levels - a poll published in September by Axios and Morning Consult revealed that about one-third of Americans said they will be less trusting of the results because of AI.⁶



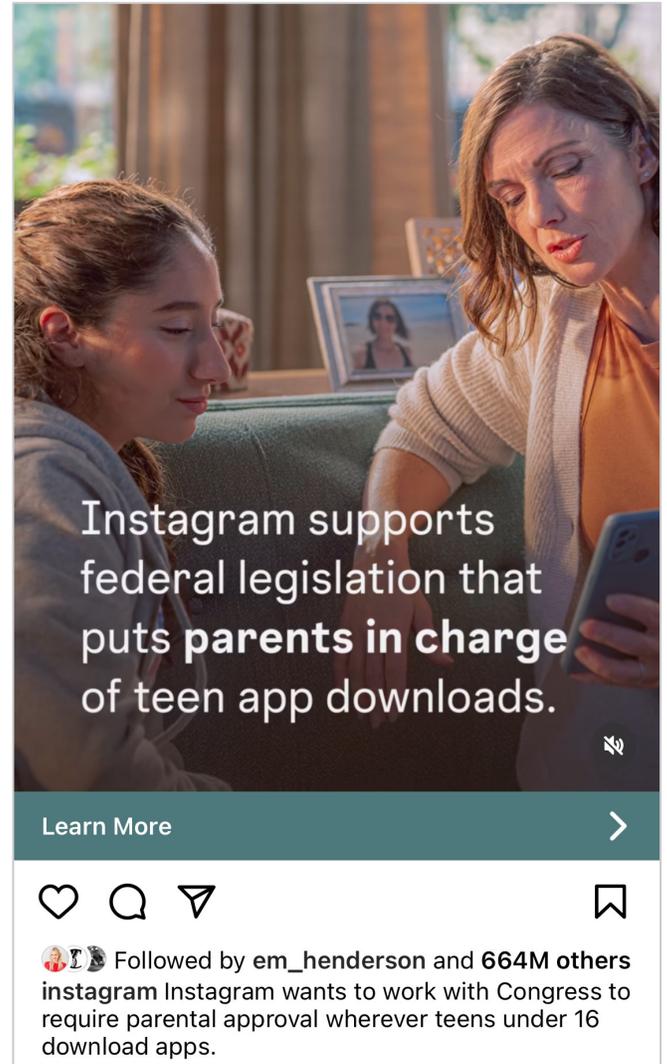
The Hill, 2023 Election Misinformation Poll



Rise of youth activists

A growing coalition of youth-led organizations are rising up and demanding that federal and state governments take action to protect kids' online safety. *Design It For Us* is one of the many rising youth groups advocating for safer online platforms for kids, teens, and young adults. One of its founders, 21-year-old university student Zamaan Qureshi, said his organization doesn't just want a seat at the table, they "want to be seen as meaningful collaborators" when policy is being shaped.⁷

Some progress has been made, with social platforms implementing more safety tools, in-app warnings and parental controls to protect users under 17 from online harassment. But it has yet to be seen whether these actions are enough. In the meantime, state governments like New York and Montana (to name a few) are looking to implement their own controls. Sick of sitting back, young activists want a seat at the table to ensure legislation has their best interests at heart.⁸





How brands can get involved

- Shore up brand safety guidelines to avoid showing up near controversial content or on platforms who don't have users' best interests at heart.
- Push partners for transparency about what they are doing to protect their users' safety and well-being and to curb the spread of misinformation.
- Act with full transparency about your own brand's policies, practices, and claims to maintain trust in a year where trust will be under threat.



People will seek greater control

With massive, collective issues facing consumers today, people will use media to gain greater control over an uncertain future. Whether it's through the lens of mental health and well-being, financial security, or the health of our planet, consumers will expect media and brands to help them regain control.



Author

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VP, Strategy

Trends

- Control over their well-being
- Control over personal finances
- Control over sustainability practices

Control over their well-being

In a year of overstimulation and immense stress, people will increase their focus on their mental health. A recent dentsu Navigator study found that mental health is a top priority going into 2024, ranking highest for younger generations and women.¹ While Gen Z's top career aspiration is to be influencers, Generation Alpha wants to be healers (26% want to be a healthcare professional and 17% a teacher).²

With the expected increase in headline anxiety hitting early in 2024, people will start to put up more guardrails in media as they reprioritize where and how they spend their time. Already, consumers anticipate partaking in more enriching media habits such as reading books (42% say they will do so more often in 2024) and listening to podcasts (35% more often in 2024).¹



Control over personal finances

With the high cost-of-living today, people are taking measures into their own hands to build wealth. Fidelity found that 51% of teens are interested in using money saving or investment apps for the ability to control and make their own investment decisions.³ Younger generations are turning to media for self-directed learning in financial literacy with 28% of teens turning to social media, 27% to podcasts and 23% to online forums.³

In addition to investing, Accenture Song found that 20% of people are looking to influencers and brand social accounts for tips on budgeting, while another 20% are turning to content that suggests alternatives or dupes to popular products (undoubtedly challenging brand loyalty).⁴ The question will be what brands will do in response to younger consumers taking a more pragmatic approach to finance and spending.

Control over their sustainability practice

When it comes to climate change, there continues to be more awareness and incentive for people to take control and contribute as best they can. Dentsu's Navigator survey found that out of a list of issues facing our nation today, surprisingly sustainability was the place people are most optimistic (44%).¹ Beyond adapting sustainable practices, 2 out of 3 people plan on keeping up with sustainable topics via media.¹ Research recently done by Unilever found that 3 in 4 people are more likely to take up behaviors that are good for the environment after watching social media content, while 8 in 10 think TikTok and Instagram are good place to get advice about how to live sustainably.⁵

In addition to their quest for self-education, consumers are asking brands for more meaningful action and greater

transparency – 61% of respondents report that their purchases are influenced by brand communications about sustainability.⁶

Not only is the social pressure of individuals pushing brands, but it is also influencing cultural and media properties of today. Media tentpoles are starting to highlight their efforts to be green. For example, the 2024 Super Bowl is planting dozens of trees to help offset the event's impact, and the Paris Olympics is looking to be the most sustainable Games yet, with 100% carbon neutrality.^{6,7} We're also seeing a rise in entertainment focused on storylines that shed light on the importance of protecting the planet – Dune: Part Two, The Last of Us: Season 2, Planet Earth III, Furiosa: A Mad Max Saga, and The Lion King 2.





How brands can get involved

- With people putting up guardrails on media usage to help their well-being, create more rewarding media experiences that provide value to their lives.
- Consider what role your brand can play in a consumer's journey to self-educate with the goal of becoming a more valuable and assistive brand in their lives.
- Challenge how your brand can take a more visible and meaningful role in the push for a sustainable future.



2024: A year of empowerment



Despite some warning signs ahead, we predict that 2024 will be a year of empowerment for consumers. As consumers take greater control over their circumstances and their well-being, they will re-evaluate their relationships with media and with brands. We are seeing major media franchises and platforms innovating to meet them where they are and creating more purposeful content that enriches their lives. There is a lot to be hopeful for as we enter a new year.

At Carat, we are focused on Designing for People. By putting consumers at the heart of how we go to market, we design rewarding media experiences that make everyday life better.

Cheers to 2024!

Designing for the Now and Next: 2024

Contributors



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