

THE DUALITY OF MEDIA



VOXMEDIA | CARAT

Exec Summary

Media moves at the speed of culture, and culture seems to be changing faster than ever before. In 2023, Carat and Vox Media embarked on a mission to define the new cultural framework. We wanted to understand the role that media and culture play in consumers' lives, the forces that shape how culture is consumed and spread, and how brands can harness culture to create deeper consumer connections.

At Carat, we are fascinated by people and what drives their behaviors and attitudes. Working with Vox, whose editorial networks ignite conversations and influence culture, was a perfect alignment to uncover how we can push the boundaries of media to deliver more rewarding experiences.

Through a joint research study, we uncovered a dueling need for culture to satisfy both niche and mass connections. Advancements in media and tech over recent years have enabled consumers to develop and indulge their individual identities and passions. But an overreliance on algorithms has left us feeling isolated and disconnected from each other. Ready to regain control of their lives, consumers are seeking a greater balance between niche passions and mass cultural moments that make them feel part of the collective. This desire for balance is reshaping media and culture in fundamental ways.

The Need for Niche & Mass Connection

For us to live a harmonious life, balance is critical. We seek a balance between our individual identity (our ability to express uniqueness) and shared identity (a sense of belonging to a collective). Both need to be developed for well-being, and the two identities work in harmony to create culture.

Events of recent years - a global pandemic, international turmoil, a period of recession - have thrown us out of balance. As family structures, working routines, and even interactions with each other have felt out of balance, we're working to regain confidence in ourselves, our beliefs, and the things we love most. This imbalance has also shifted our media consumption, leading us to choose media content that builds on our own unique interests and passions.

But what's missing when we over index on niche media is a feeling of connectedness to other people, communities, and society as a whole. As social media algorithms take us down deeper and deeper

rabbit holes, we're left feeling detached from reality. To combat this feeling, we seek content that offers a delicate balance between being niche and for the masses – we want to learn something new about a topic we care about while also feeling closer to other people.

Ultimately, media engagement presents an opportunity to develop both our individual and shared identities. We find our uniqueness through niche media and our shared identity through mass media. Consumers are looking for their favorite publishers and brands to serve as bifocals, offering the opportunity to zero in on a particular topic they're interested in while simultaneously expanding their horizons. To capture attention, marketers must find the perfect duality between embracing niche passion points and encouraging new connections.

Confidently moving on from the pandemic past

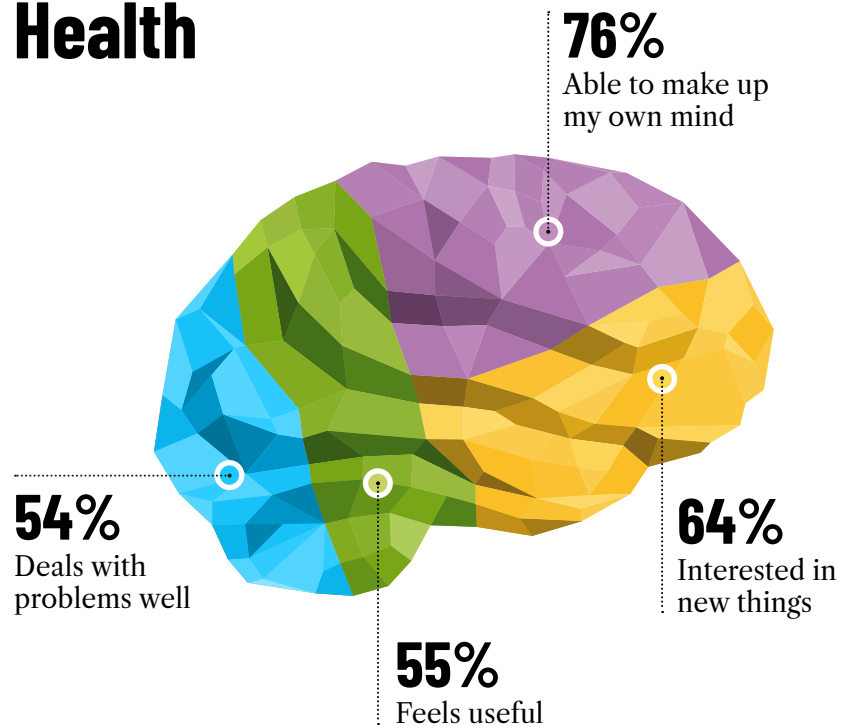
Over the last year and a half, consumers have been wrestling back control from the pandemic past. We've gone through revenge spending and travel and are starting to move into the next phase of self-actualization and a general sense of positivity.

Using the [Warwick Edinburgh mental well being scale](#), we wanted to understand the general well being of today's consumer. In summary, the scale takes into account:

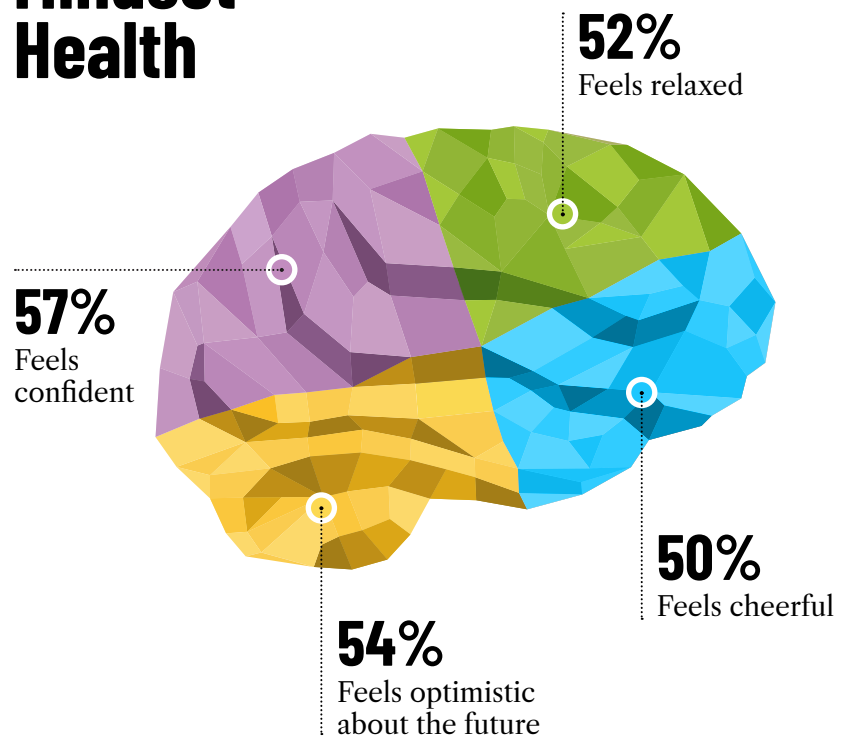


We found that consumers are beginning to reclaim control of their lives and have a better take on self, honing their decisiveness and taking an interest in new things. That being said, self-actualization appears to be a long journey. Consumers are split nearly evenly on whether or not they feel useful, solution-oriented, confident and optimistic.

Actualization Health



Mindset Health

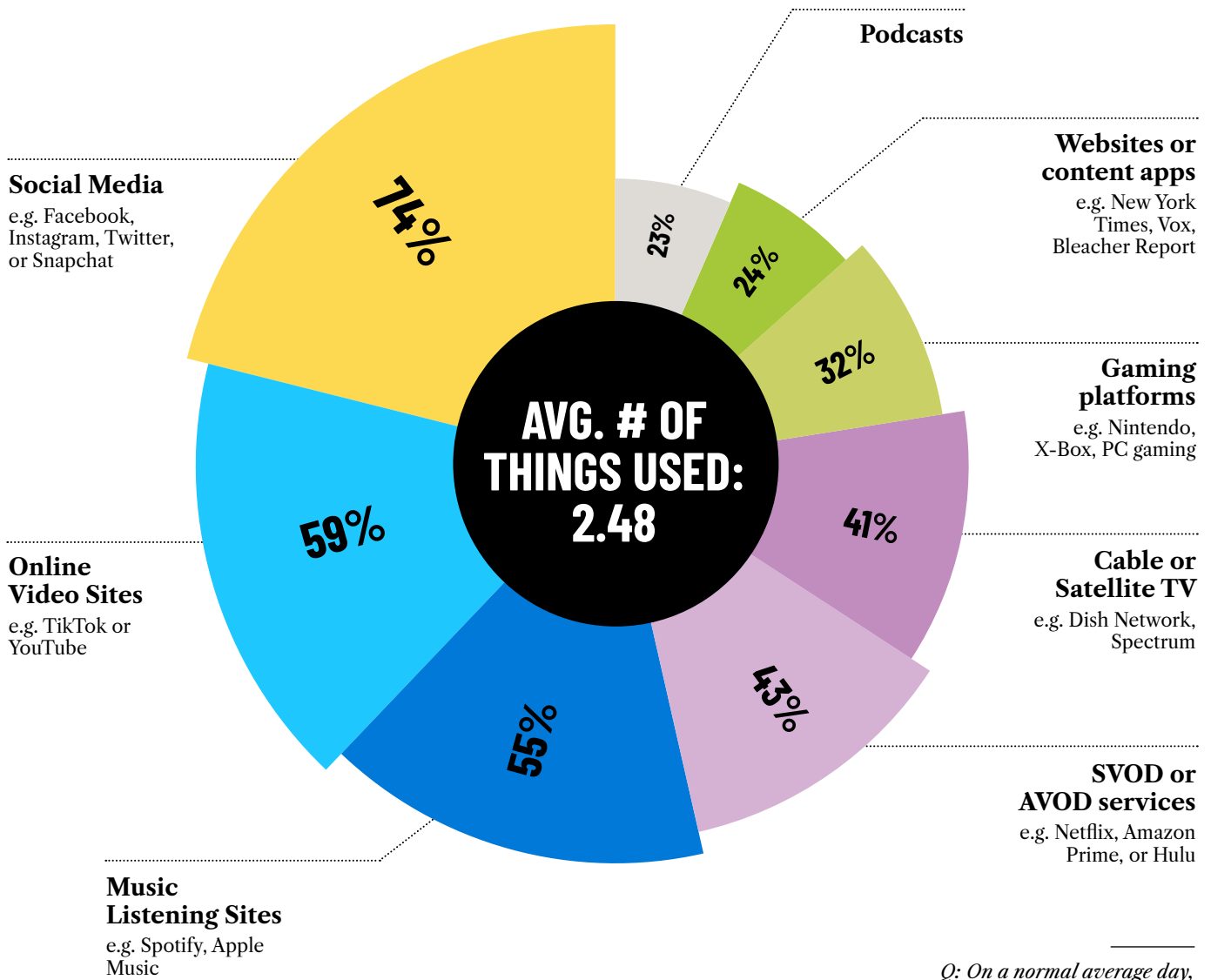


Q: Thinking about how you feel TODAY versus a YEAR AGO, use the following scale to indicate how much you agree with each.

Dueling desires for self-actualization and connection shape media consumption

This push for feeling in control extends to media consumption - nearly two in three consumers feel in control of the media they consume. For the most part, social media, online video sites, and music top our daily media choices in terms of overall usage.

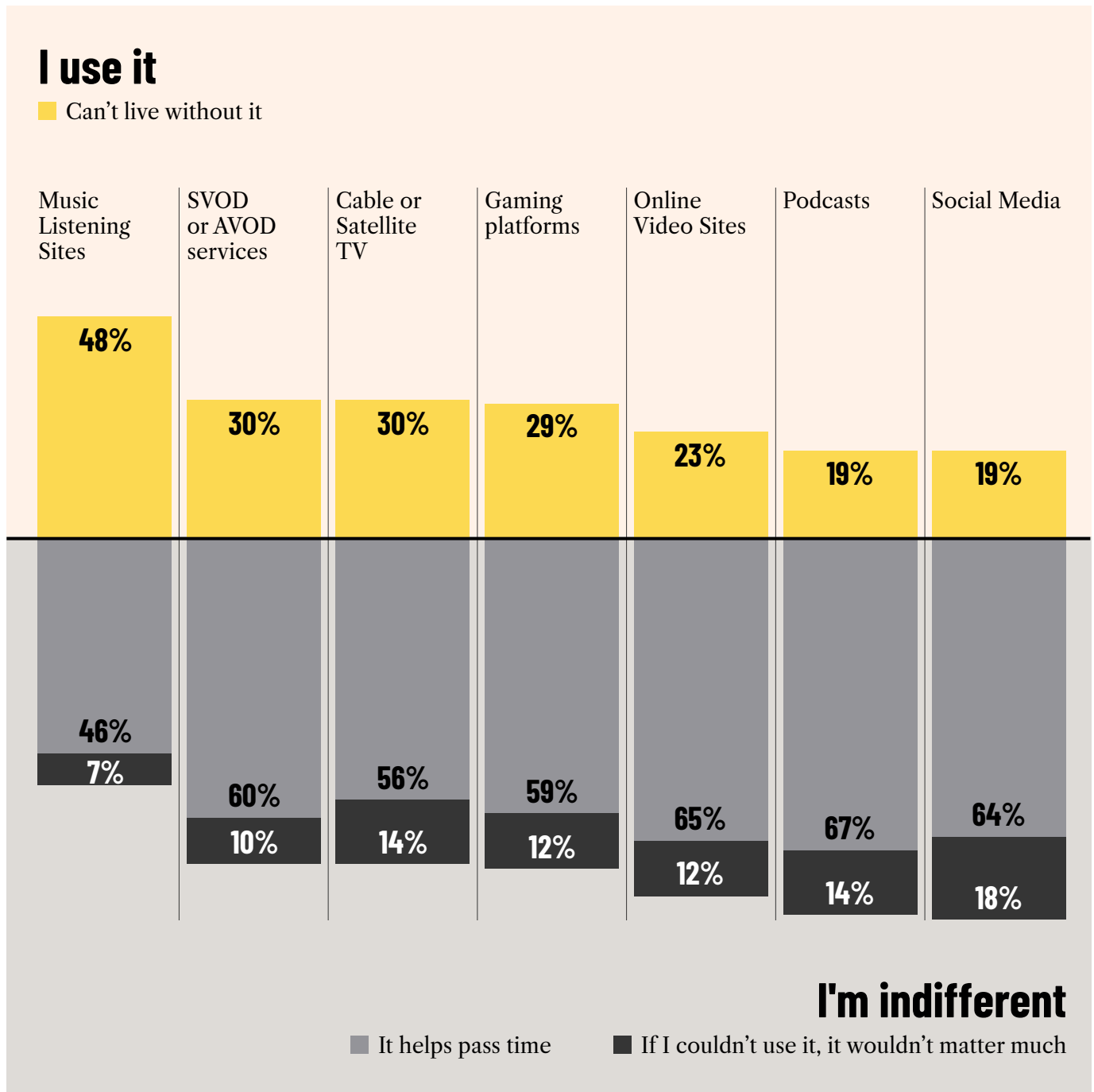
On a normal average day I use...



Q: On a normal average day, which of the following do you use? Select all that apply.

But the deep hold and important role social platforms once played is starting to evolve from being the most important media we couldn't live without, to a more functional form of "helping pass time." One should ask, has the novelty worn off? Are we starting to view social as the actual lean back experience of television that we all knew from decades ago?

How do I pass my time?

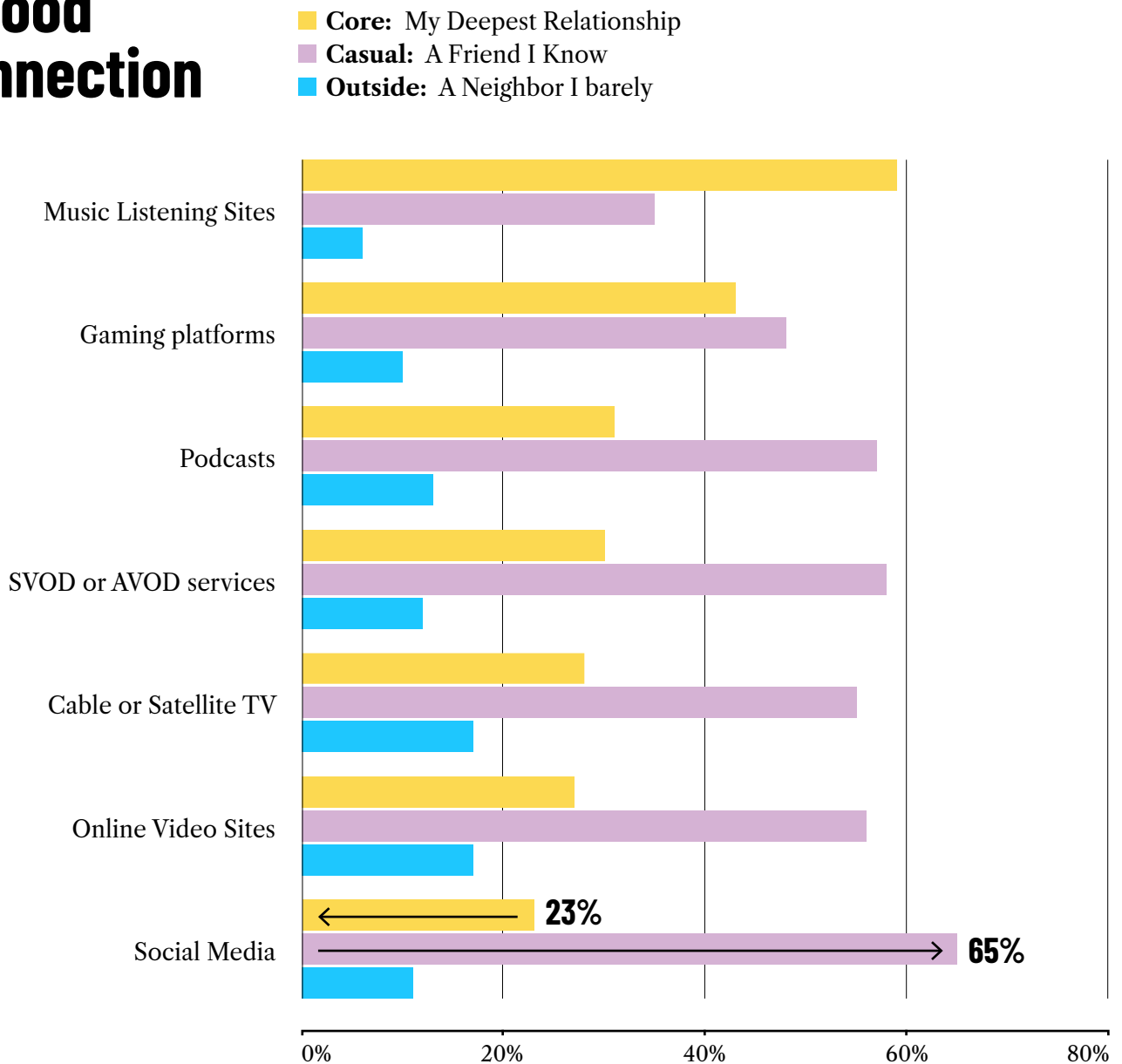


Q: Which statement do you agree with most for each on this list?

Ironically, while social media is a proposed collection of our deepest connections, aspirations, and passions, today we'd describe these platforms as a casual friend I know versus being core and a part of my deepest relationships. This is incredibly important because it speaks to the growing effectiveness, or ineffectiveness, of the algorithms.

More importantly, it shows that media we choose versus media that's an off chance part of our feed actually connects and hits differently. Media we have to click to engage with, that's longer in length, and normally more in depth is also considered more core and a deeper part/core of who we are.

A good connection



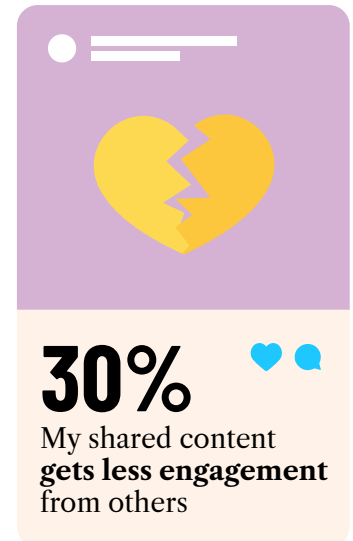
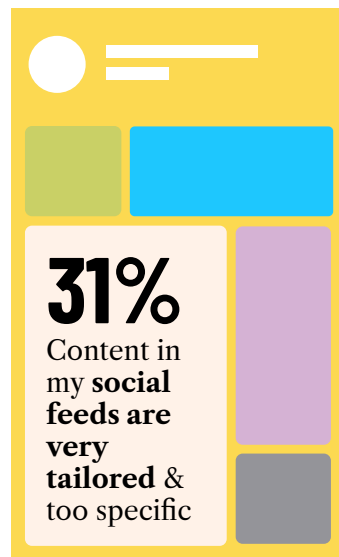
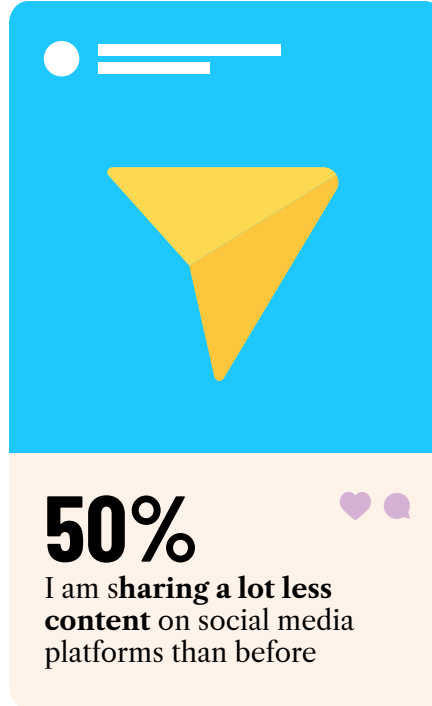
Q: If you had to describe your relationship with each, how would you describe it. Select one answer for each on this list.

Social media skewing “too niche”

Let’s explore this changing role of social media. One in three believe that the feed is starting to become too specific. As a result, half are sharing less on social media platforms than they once were, and even when content is shared, a third of consumers see less engagement.

While we prize personalization and algorithms, we have to wonder whether we’ve created too much fragmentation. Are we starting to enter the “uncanny valley” of connection? We think we are “connected,” but after hours of scrolling TikTok or Reels, we are left in a bleary eyed lonely haze. The fact is, while we spend a ton of time online, only 44% agree that their digital connections are also their “real friends in real life.” Only 39% trust the content they consume and a full third (34%) of people say they get offended by what is served to them in the feed. The continued tweak of the algorithm may help with monetization, but it is having a profound impact on depth, relationships, and connection.

Social media is “too niche”

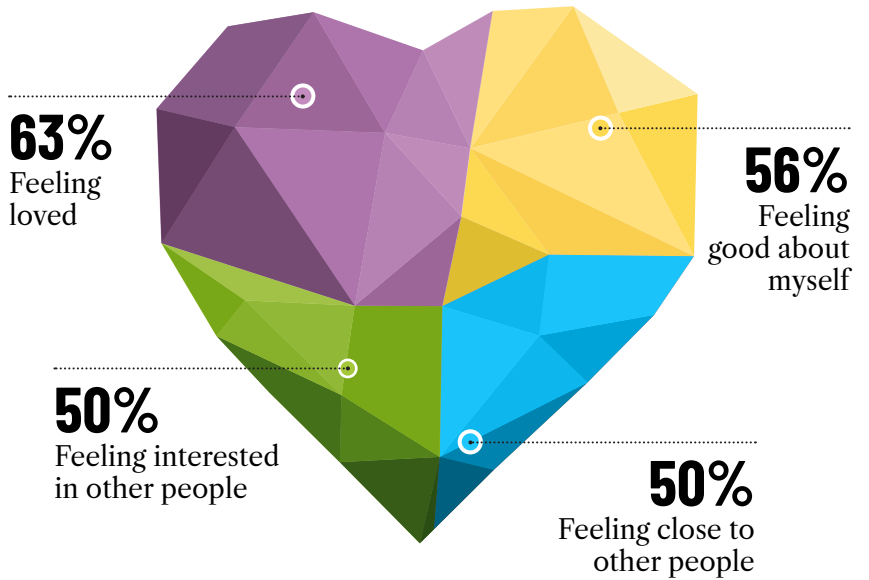


Q: When thinking about the content you consume (read, watch or listen to), how much do you agree with each statement on the following scale?

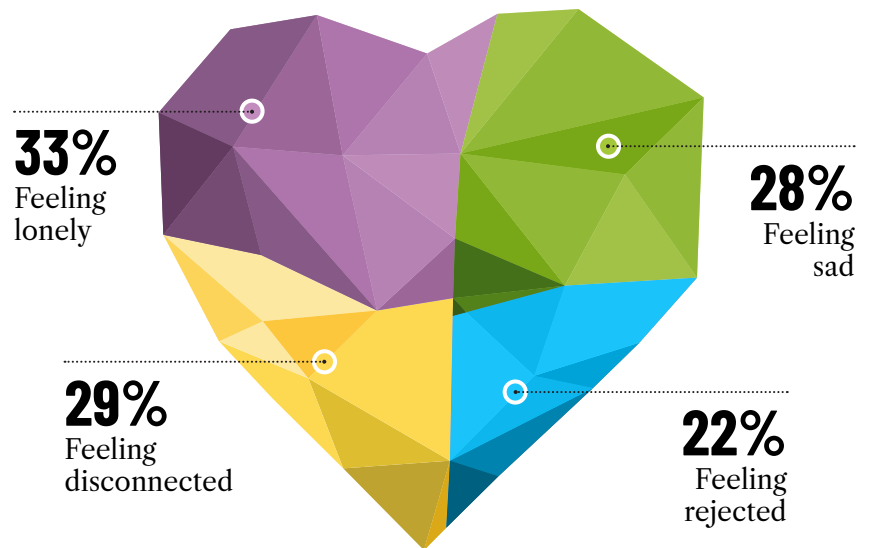
The time for reconnection is now

Bringing us back to the Warwick Edinburgh mental well being scale, just as consumers are working toward actualizing their full self, they also recognize there's room for improvement when it comes to their relationship health. 50% of consumers currently feel close to other people, which means the same percentage are feeling distant.

Relationship Health



Disconnected Health



Q: Thinking about how you feel TODAY versus a YEAR AGO, use the following scale to indicate how much you agree with each.

In fact, the majority don't feel very connected, unified, or part of larger society. Consumers are not yet sensing collectivism, a critical ingredient that helps to form culture and cohesion.

An epidemic of loneliness has been an ongoing health crisis even before the pandemic, but now that we're feeling better about ourselves, we're in a better position to strengthen our bonds with others and grow more connected to broader society.

We belong together

Despite some differences, we are more alike with others than different



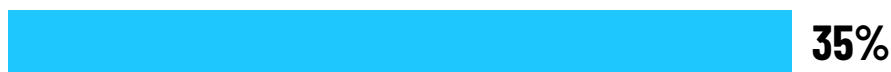
I feel a sense of unity with those around me



Being part of a community is a key part of my life



Being part of a community is central to my sense of who I am



I feel deeply connected to larger society



When I look around, I feel a "WE-ness"



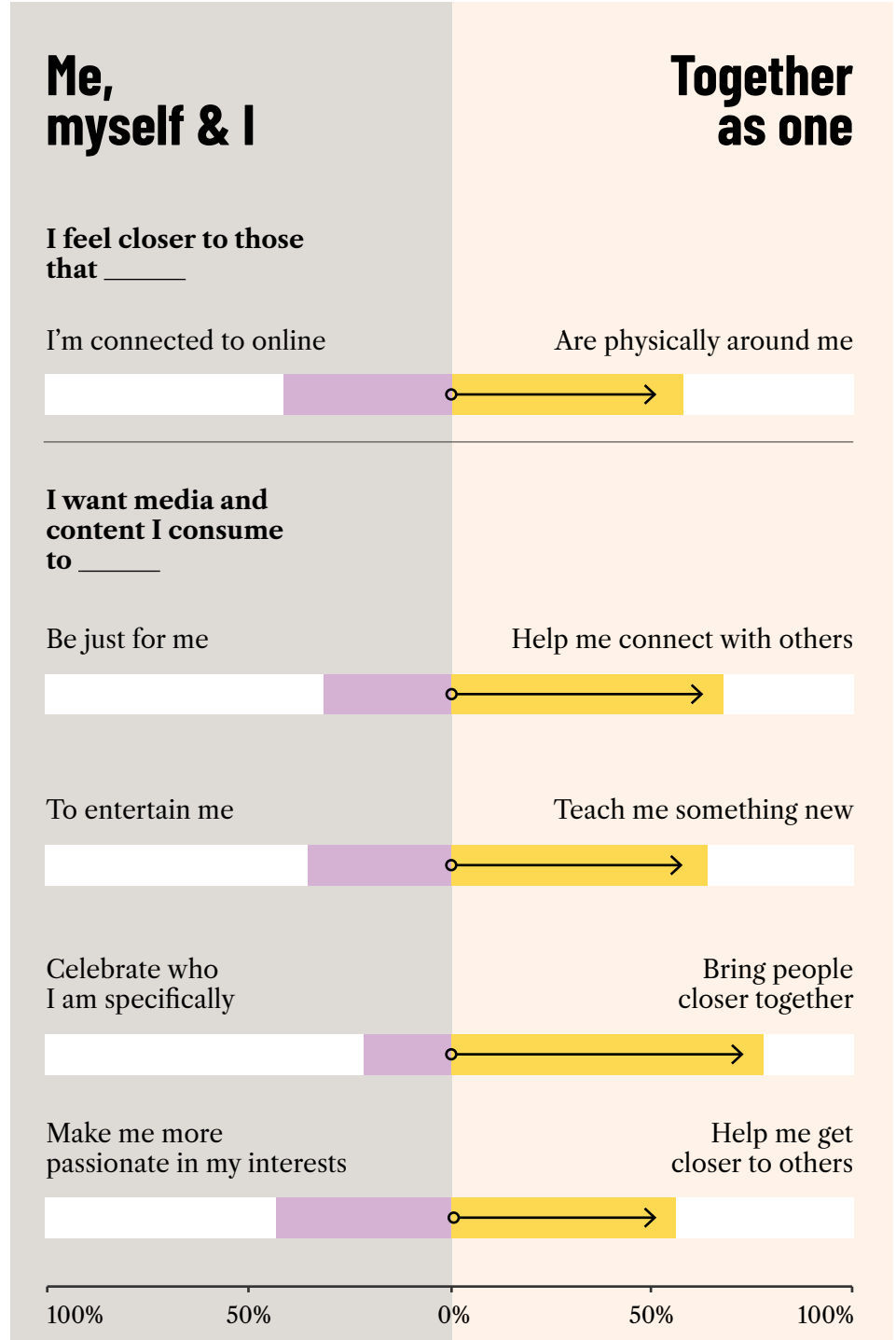
Q: Using the same agreement scale, how much do you agree with each?

We want media that brings us together

We have to ask ourselves if we are near the Tower of Babel moment for media. If marketers align with platforms that are too fragmented in nature, it can be more difficult to scale the connection that we know consumers are craving.

No data points are stronger than asking consumers flat out what they'd prefer. It's clear that today's preferred media is about bringing people you know physically closer, creating connection/learning, and ultimately forming much tighter and more meaningful bonds.

What we want from media now




Q: Which statement do you agree with more?

Two in five consumers recognize the growing importance of large cultural moments like the Super Bowl, blockbuster movies, and TV shows, while a third are willing to pay a premium for big events. Even looking at this past summer, connection is the driving force behind someone shelling out \$72,000 to go see a Taylor Swift concert, BTS, or Queen Bee, as well as increased ratings for moments like the Tony Awards.

Content habits may have changed in the last year

Enjoying larger events like the Super Bowl, Oscars, blockbuster movies



42%

Cultural events are even more important to me than before



39%

Making an effort to watch the latest movie releases¹



38%

Making an effort to watch TV shows that are being talked about in the mainstream media²



37%

Tend to consume media that is popular with the general public



37%

Willing to pay more for live events³



34%

Q: When thinking about how your content habits may have changed in the last year, how much do you agree with each statement?

¹ e.g. Barbie, Spiderman, or Oppenheimer

² e.g. Yellowstone, the Ozark, Game of Thrones, etc.

³ e.g. sporting events or concerts

The rebalancing and growth towards mass culture

While no one will question the power and personalization of social media algorithms, consumers are increasingly looking for media publishers and platforms that offer an opportunity to develop both our individualized and collective selves.

What's important to recognize is that the best of mass culture is reflective of the many niche cultures within it. If we were to ask consumers about their habits, about two in five state that their media consumption is tied to both a specific passion point AND helping them connect to others.

Reason for media consumption

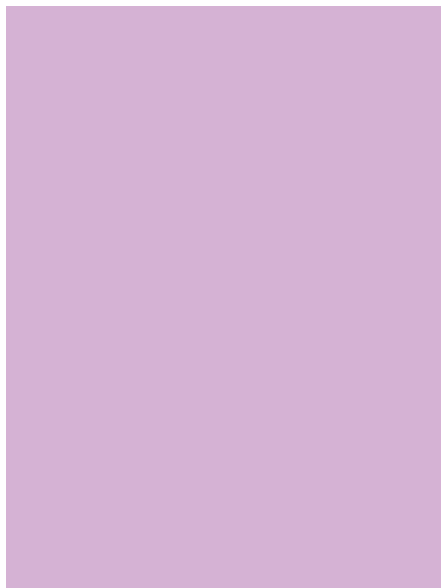
42%

A lot of my media consumption is tied around a **large interest**



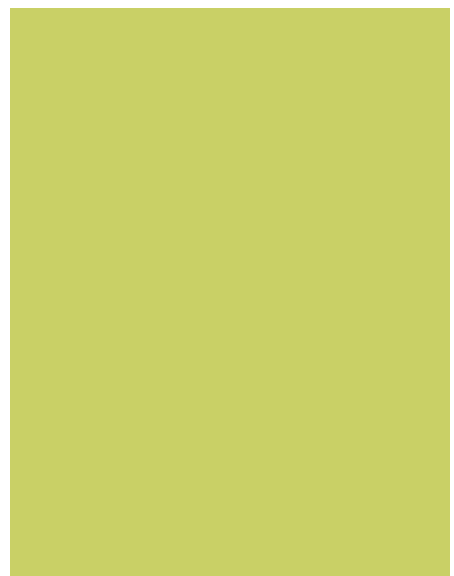
40%

I often consume content that **I can talk about with a large group of people/friends**



39%

I often consume content that **helps me feel part of my larger community/society**



Q: When thinking about the content you consume (read, watch or listen to), how much do you agree with each statement on the following scale?

Celebrating, discussing, and amplifying niche culture on a mass scale helps individuals feel seen and celebrated and opens up new audiences to connect with new passions, ultimately fostering community.

So what does this mean for marketers?

Now that we have a stronger sense of self, we're eager to feel closer with other people and to celebrate moments of connection. While social and algorithm driven platforms are great for discovering niche content, they can often lead to isolation and a sense of fragmentation. It's becoming increasingly important for publishers and brands to tell stories through a bifocal lens - one that celebrates niche culture while simultaneously fostering community and connection.

Vox Media has experience telling stories that first connect with consumers on an individual level but then successfully bring people together in a meaningful way. For example, pop culture enthusiasts were captivated by New York Magazine's piece "[How a Nepo Baby is Born](#)". The article then created a tidal wave of interest in "nepo babies", sparking endless conversation across social media platforms. In the 6 months following the article's publication, approximately 9,000 videos were uploaded across social media platforms referencing "nepo baby", amassing over 600 million video views. (Tubular Labs) Or one more example - Vox Media Studios' PGA series "[Full Swing](#)". While the series captured the attention of golfers everywhere, it also brought golf to the masses. According to Golf Digest, 1 in 10 "Full Swing" viewers had never tuned into PGA Tour coverage in the 6 months prior to the series' debut, but they did tune in after watching the show.



New York Magazine | Culture

How a Nepo Baby Is Born

Hollywood has always loved the children of famous people. In 2022, the internet reduced them to two little words.



Netflix | PGA Tour | Vox Media Studios

Full Swing

Follows behind the scenes of what it takes to compete and win at the highest levels in men's professional golf, following the PGA players through their wins and losses.

In the end, to develop deeper connections with consumers, marketers must satisfy dueling desires - reaching them where they are expressing individuality within niche passions and integrating into mass culture moments that bring people together all through the right publishers and platforms.

From a category lens, The Secret Deodorant “No More [Financial] Secrets” campaign was a strategic collaboration between Vox Media and Carat aimed at tackling financial inequities experienced by women on both an individual and collective level. Through tailored content across various platforms, advice from trusted voices like [@caitlinkumi](#), [@financiallybrave](#) and [@moneywithsaprina](#) brought women into a financial community and offered tailored advice for common money moves like [finding a community to grow with](#), [investing in the right people](#), [budgeting advice](#) and [curbing mood-related bad money habits](#). Aligned with Secret's mission to empower women with financial confidence, the partnership fostered a community of women around financial literacy while helping them reach their individual goals.


Secret Deodorant | Vox Media

"No More [Financial] Secrets" Ad Campaign

MONEY & CAREER · MONEY ADVERTISER CONTENT FROM Secret

Why Financial Literacy Should Be a Priority for Every Young Woman


By Annalise Mantz
Published on 11/10/2023 at 9:00 AM



ADVERTISER CONTENT FROM SECRET DEODORANT

My Financial Secret:

Grow with a community




ps popsugar · Follow
Paid partnership with secretdeodorant

ps popsugar · 9w
Personal brands are not just for influencers! Creating a brand grants you entry into a community that can serve you well when looking to embark on a new career path or money making options. #financialliteracy #nomorefinancialsecrets #ad

November 10, 2023

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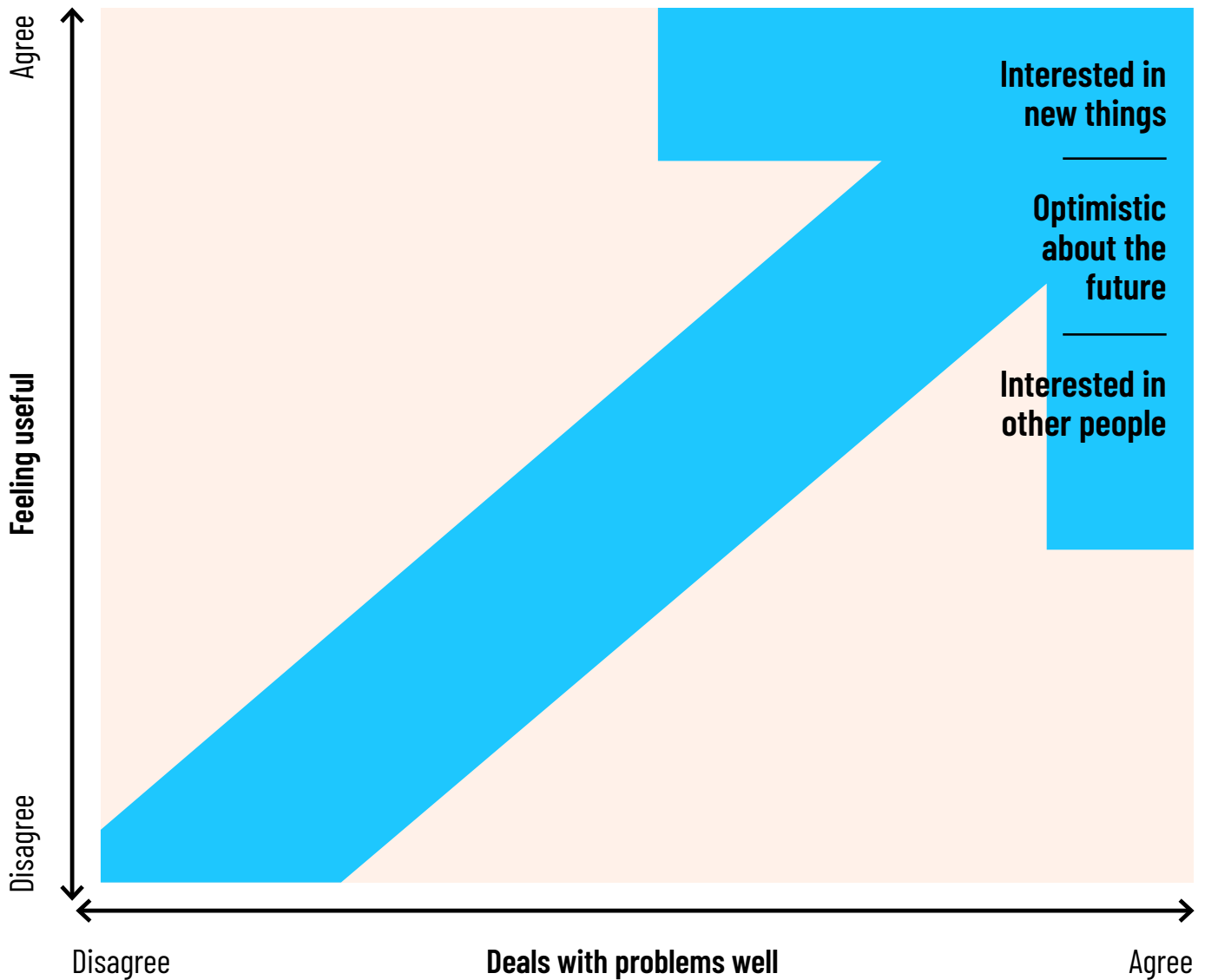


YOUR MONEY, EXPLAINED

PRESENTED BY Secret

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The right balance



Not a surprise, among those consumers who are feeling useful or dealing with problems well, they are nearly 2-X as likely to be interested in new things, interested in other people, optimistic about the future, and 4x more likely to say they had energy to spare. What type of media and society are we building next together?

Thank you.

Joanna Hawkes

Head of Strategy, Carat

Julia Goorin

Senior Director, Vox Media

Naira Musallam

Co-CEO, SightX

Madeline Growe

Senior Research Manager, SightX

Edwin Wong

SVP of Insights & Research, Vox Media

Diana Young

Visual Designer, D-Constructed

Methodology

A survey was commissioned to ~4,500 consumers in September 2023. Our partner, SightX is a premium research partner. Their goal is to automate curiosity.

Why Carat

Founded over 50 years ago as the world's first media agency, Carat is deeply committed to understanding our clients and their customers. By Designing for People, we deliver an unparalleled capability to unlock real human understanding to connect people and brands by designing more rewarding media experiences.

Why Vox

Vox Media exists at the core of culture, with celebrated brands, passionate communities, and brilliant creators that prove influence sparks action. Across 17 networks, digital, podcasts, TV, streaming, live events, and print, we tell stories that affect our audience's daily lives and entertain as much as they inform.