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A Shifting Environment for Content

SUMMARY: Content producers face an increasingly challenging environment. Audiences are fragmented and distracted, and they expect to be entertained and informed for free. Delivery channels are shifting rapidly for both economic and technological reasons, a trend likely to accelerate over the medium-term future.

Forecasts

- Content personalization will steadily increase as pervasive data feeds are further filtered through automated content selection and creation.

- Innovations in micropayments and paywalls may make it easier to sell content, but charging for content will divide audiences more firmly into those ready to pay and those satisfied with free content.

- The consumption of media will increasingly be seen as a political act. Different sources will be tagged—accurately or not—as favoring one side of various political and social divides. Reading, subscribing to, or advertising in media will increasingly be perceived as political acts.

- More content creation will be automated. Automated production may take on basic information-update articles, as well as listicle-style entertainment pieces.

- Automated content-filtering systems will increasingly reveal the discrepancies between consumers' stated, actual, aspirational, and demonstrated content preferences, which are often at odds.

Key Uncertainties

The changing role of social media

Feasibility of widespread paywalls

Spread and nature of content personalization

How the media habits of millennials and post-millennials evolve

How quickly automated content-creation capabilities grow

The changing nature of attention

Attitudes about privacy and data gathering and use

Prevalence of filter bubbles and efforts to combat them

Supporting Trends

- **Paying for news.** The era of free online news content is ending as more newspapers erect paywalls to charge for online content.

- **Political lenses on media.** Americans on both sides of the political divide get news from similar sources, but how they view those sources is different.

- **Declining attention spans.** People's attention spans are attenuating in the face of technologies that provide constant distraction and interruption.

- **The thinning long tail.** The dominance of highly popular products and content is increasing in many areas of consumer life, decreasing the market for less popular items out on the "long tail."

- **The push for facts.** In the face of a perceived flood of propaganda and "fake news," there is a pro-truth counter-push.

- **I read it online.** Social media is increasingly the filter by which many Americans determine the news they see.

- **GIFs proliferate.** GIFs (short video clips) are a popular way for people to express a range of ideas and emotions online.

- **Social media's negative effects on health.** Use of social media is being linked to brain, behavior, and mood changes.

Related Drivers of Change

- Nichification: Big-Data Segmentation
- Marketing and Advertising Transformation
- New Journal Models
- Microlearning
- Socializing Reshaped

Notable Data Points

SOCIAL MEDIA GENERATION GAPS

A 2018 study found that **18-to-24-year-olds** and those **aged 50-plus had usage gaps** on YouTube (38-point gap), Facebook (25-point gap), Snapchat (71-point gap), Instagram (55-point gap), and Twitter (31-point gap).

Source: Pew Research Center

SHRINKING LONG TAIL

In 2006, the **top 3% of YouTube channels had 64% of all views**. In 2016, this had **risen to 90%**.

Source: Todd C. Frankel, "Why almost no one is making a living on YouTube," The Washington Post, March 2, 2018.

DOUBTS ABOUT THE MEDIA

Among Republicans and Republican-leaners polled in 2017, **85% said they thought the mainstream media have a negative effect** on the country's direction. Among Democrats and Democratic-leaners, 46% thought this.

Source: Pew Research Center

Strategic Insights

- Curation of information for members could be offered at varying levels of precision and volume based on types of membership. Aspects of this will be served by increasing automation of scanning and extraction. Information verification can be an important part of this curation.

- Researchers have suggested that Facebook and other social media let users write their own formulas for newsfeeds. People could subscribe to others' formulas, including those created by organizations. This could be another means for associations to engage in curation via social media.

- Sharp generational differences in media use—especially social media and podcasts—suggest that associations will be required to use diverse platforms, but leaders will also have an opportunity to tailor content for age groups by platform.

- The value of trust for associations providing information will grow; it will be a comparative advantage for organizations to be viewed as sources of reliable data and viewpoints concerning their industry. Trust will also be crucial in convincing members to provide the information about themselves that can enable personalization.

- As interfaces, delivery channels, and generational expectations change, the demand for written-word information delivery to be supplemented or replaced by images, videos, and audio formats will grow.

Timing

- **Stage:** Growth, with change underway in multiple dimensions
- **Speed:** Rapid, with some limits placed by deep-seated habits and the role of large institutions

Potential Alternative Futures

- **Partisan media:** Most media outlets discard efforts at non-partisanship and return to the historical norm of favoring particular parties or movements.

- **Full personalization:** Automation-assisted personalization begins to dominate media feeds and reaches into the internal content of individual articles and stories.

- **Paywall palace:** Much high-quality content goes behind paywalls, accessible only to dedicated or monied readers.

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Take Action

- **Drive member value with smart content strategy.** Content is the fundamental value proposition for associations. Specialize in the content your members value and say no to distracting content that dilutes your impact. Plan how to execute content priorities across multiple formats and channels. Pilot test alternatives that disrupt your established formats and channels to capture new members and revenue.

- **Invest in personalizing content.** Technologies and data analytics are finally making it feasible to tailor content to individual member interests. Associations must invest in platforms like content and learning management systems and secure the technical expertise to personalize content. The risk of falling behind member expectations shaped by other types of content providers is real.

- **Deploy paywalls with purpose.** People are willing to pay through memberships and subscriptions for convenient, consistent access to quality analysis and carefully curated content. Deciding what to put behind a paywall can be both an ethical and a marketing choice—some content will be too critical to public wellbeing to withhold access, while letting non-payers experience good content can convert them to paying customers and members.

- **Format content for quick use and re-use.** In today's time-pressured and mobile environment, people favor succinct analysis and actionable information they can use and re-use. They want to easily share good information with their colleagues and social media networks. Longer reads need to be long on useable information and analysis to justify demand on readers' time and, should readers recommend these to their friends, reinforce sharers' reputation as knowledgeable and trusted colleagues.

Keyword Search

To continue researching this change driver, use combinations of these search terms:

media publishing, publishers, content, paywalls, social media, personalization, curation, attention, delivery channels, automated content creation

Who Will Be Affected

Associations are content generators and curators. These shifts affect their core value proposition and potentially their business models for publishing, learning, and other content activities. Some professions and jobs are more vulnerable to advances in automated content generation. Associations can support members who need their own content strategies to establish their value and relevance by providing platforms for sharing and training them to be effective communicators.

About ASAE ForesightWorks

ASAE ForesightWorks is a deliberate, evidence-based research program and emerging line of products to provide association professionals with a *continual* stream of intelligence about the changes facing the association industry, including:

- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans; and
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

Check **asaecenter.org/ForesightWorks** and follow **@ASAEfdn** on Twitter for updates on new findings and events.