

SEPTEMBER 2022

Beyond If You Write It, They Will Come

Exploring civic information ecosystems online to identify the op-ed for today's audiences




HARMONYLABS

harmonylabs.org
info@harmonylabs.org

311 W 43 St, 12th Floor
New York, NY 10036
+1 212 966 7606

Table of Contents



I.	Introduction	PAGES 2 – 5
----	--------------	-------------

II.	Ecosystems	PAGES 6 – 30
-----	------------	--------------

III.	Search	PAGES 31 – 32
------	--------	---------------

IV.	Conclusion	PAGE 33
-----	------------	---------

Information in the Digital World



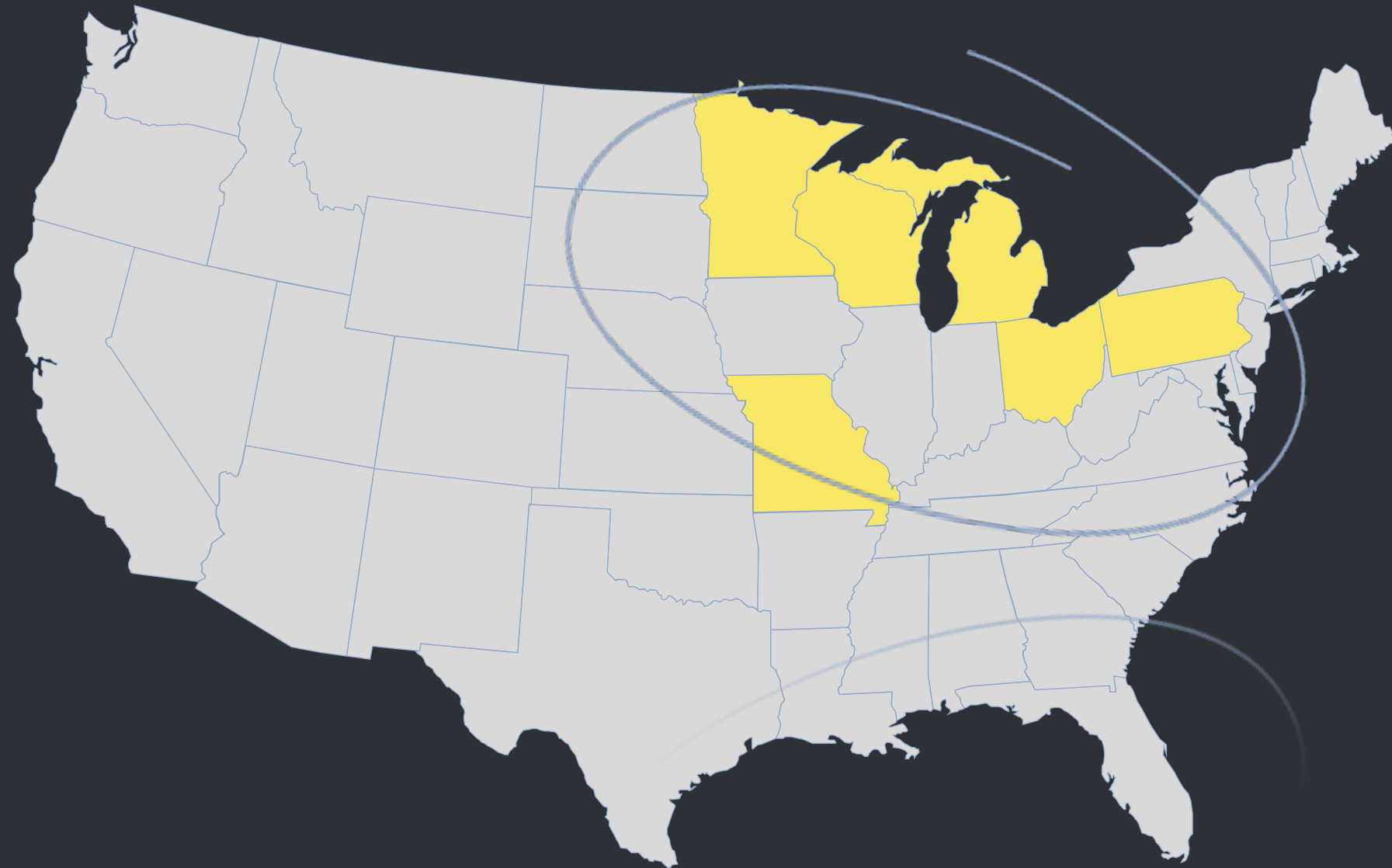
The global transformation of media in recent years has led to a growing number of questions about how people in the U.S. are getting civic information in what many perceive to be local media deserts. While traditional op-eds were once a high-reach way to inform public opinion, this new landscape has left many communicators wondering what the contemporary op-ed alternative might be.

This was the core question from a group of advocates, activists, and organizers in the Upper Midwest who joined together to learn more about key audiences: how they engage with news, local and regional politics, and culture through media; where they get their information, including mis- and dis-information; and where untapped engagement opportunities may exist to reach them.

Harmony Labs was enlisted to help, leveraging The Narrative Observatory, a one-of-a-kind data tool, which connects the minute-by-minute media behavior of 300,000+ people to the media content they care about.

Breaking It Down

Using The Narrative Observatory, we explored how people in the U.S. seek, consume, and engage with civic information, including mis- and disinformation, and where untapped engagement opportunities may exist to reach them.



We looked at:

WHO: Upper Midwest residents from a larger network of 83,000+ users in opt-in panel data

WHAT: A comprehensive view of local media behavior and media containing local names in national media from 170,000+ different media properties, plus a network containing 47M+ different links between properties

WHERE: The network is national, but with a particular focus on Michigan, Wisconsin, Minnesota, Pennsylvania, Ohio, and Missouri

HOW: Url by url browsing behavior, shared by a panel of volunteers with media measurement companies; a network of Reddit subs; YouTube channels; and news outlets that people in the US visited over the course of 2020 and 2021 was analyzed*

WHY: By painting a picture of the current information ecosystems that exist, we can develop a foundational hypothesis about “the op-ed of the 21st century” for advocates, activists, and storytellers

* While Facebook does play a very specific role in providing civic information about local living, these tiny local groups have almost no footprint in a network of media properties dedicated to information, and private Facebook activity is private (we can't see it in the data, and it wouldn't be ethical to try).

Key Findings

I.

There are two distinct types of people who consume media on the internet—those consuming “written” media and those consuming “not-written” media, or people who read vs people who watch.

II.

The other big distinction in media consumption is between news or not news—audiences don’t seek out topics or social issues, but rather can be delineated by those who consume news vs those who don’t consume news.

III.

Coverage of local issues comes mostly from a national perspective. Local content does emerge, but still comes mostly from major national news sites and within a national frame.

IV.

To reach people with civic info in this fragmented landscape, the myriad of non-news ecosystems represent significant opportunity. The op-ed of the 21st century is in a diverse set of places—and is distinctly not in simply generating more conventional news stories.

V.

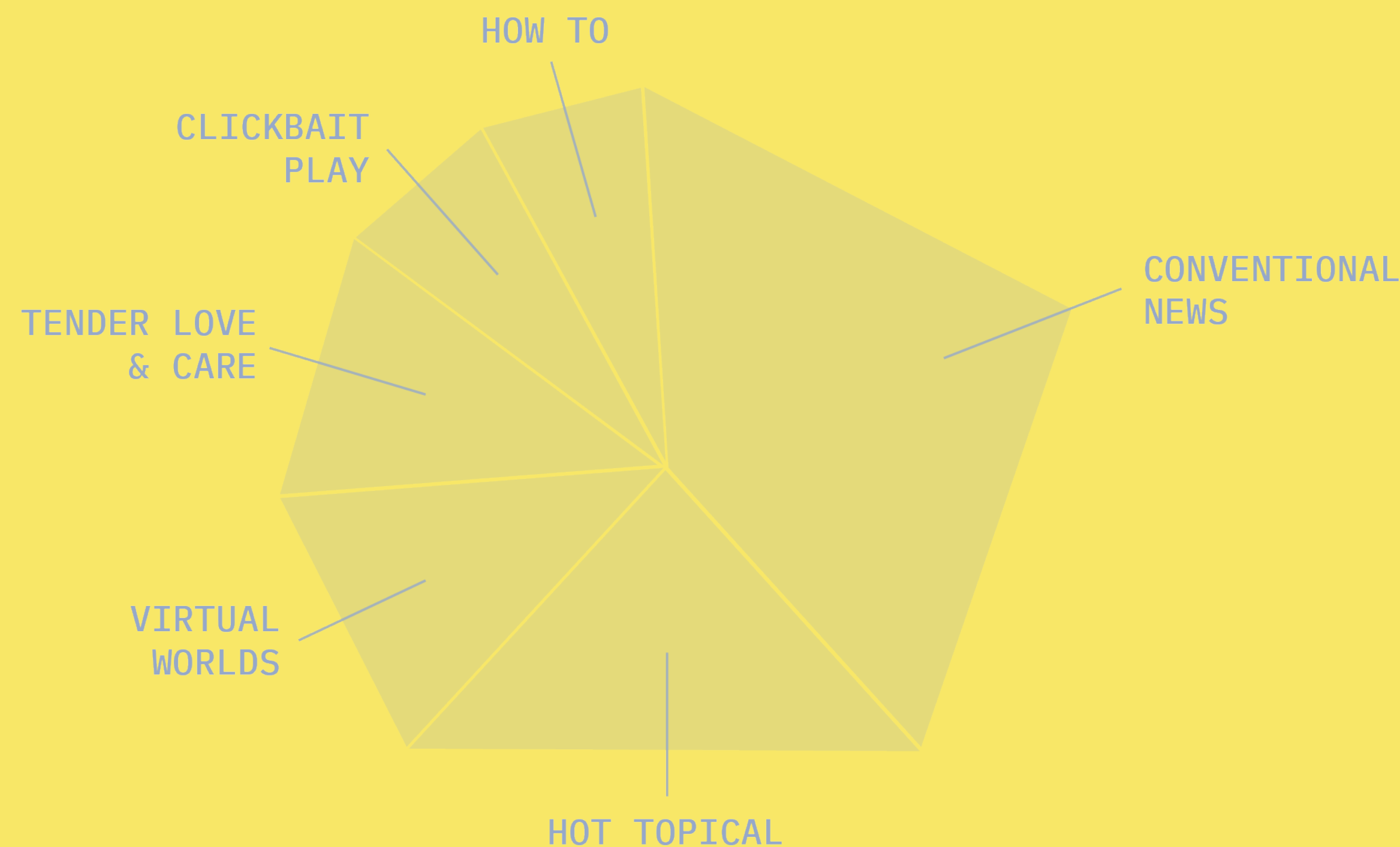
Our intuition that people are searching for and seeking out civic information is not supported by actual behavior—people search for information relevant to their day-to-day lives, not for broader and macro-level civic topics.



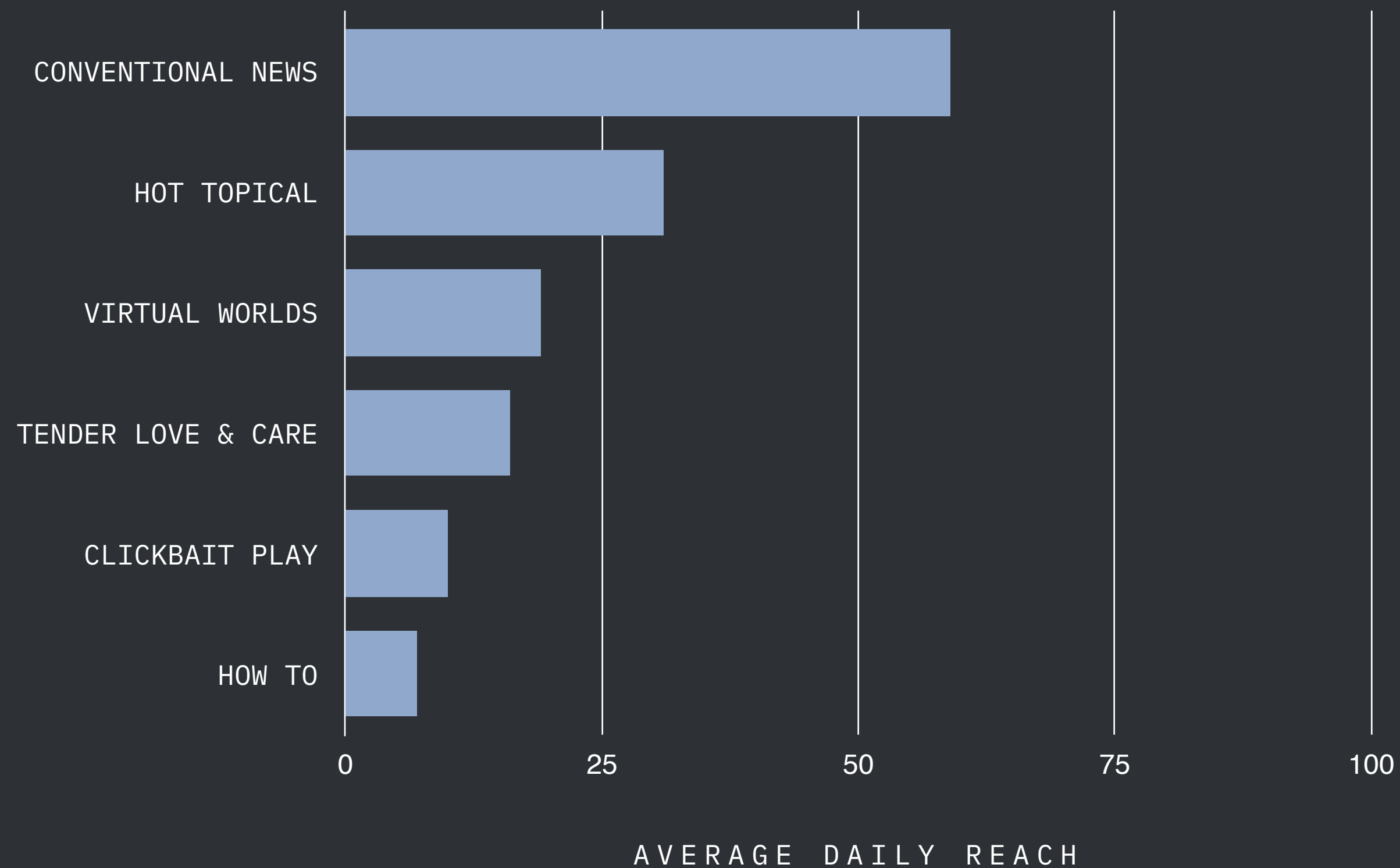
The 6 Ecosystems

Using the browsing behavior from our opt-in media consumption panel, we identified six unique content ecosystems from a network of Reddit subs, YouTube channels, and news outlets that people in the US visited over the course of 2020 and 2021. These ecosystems represent 83,000 users, more than 170,000 different media properties, and a network containing more than 47 million different links between properties:

- CONVENTIONAL NEWS
- HOT TOPICAL
- VIRTUAL WORLDS
- TENDER LOVE & CARE
- CLICKBAIT PLAY
- HOW TO



Ecosystem Reach



It's worth noting that all ecosystems are not of equal size. There are major differences between those who read vs those who watch, and between those who consume news and those who don't. Almost 60% of people in our data were in the Conventional News ecosystem on an average day—leaving 40% of people in the other five ecosystems who aren't, and who's non-news media behavior represents a very different type of engagement opportunity.

Average Daily Reach shows the percent of people who consumed anything in the network and who visited the ecosystem on an average day. These numbers add up to more than 100% because one panelist can visit multiple ecosystems on a given day.

What's the deal with behavioral data?



Mapping the entire network of audiences and media, and then finding its natural partitions, helps us understand what drives people's choices about information sources.

Very specifically, the data in this report and from the corresponding ecosystems are all behavioral—they are not survey data.

We don't rely on surveys because individuals usually can't recall all of their online behavior—they don't remember all of their internet queries or every news site they went to, and even when they do, they might be tempted to align their reported media consumption to supposed cultural ideals.

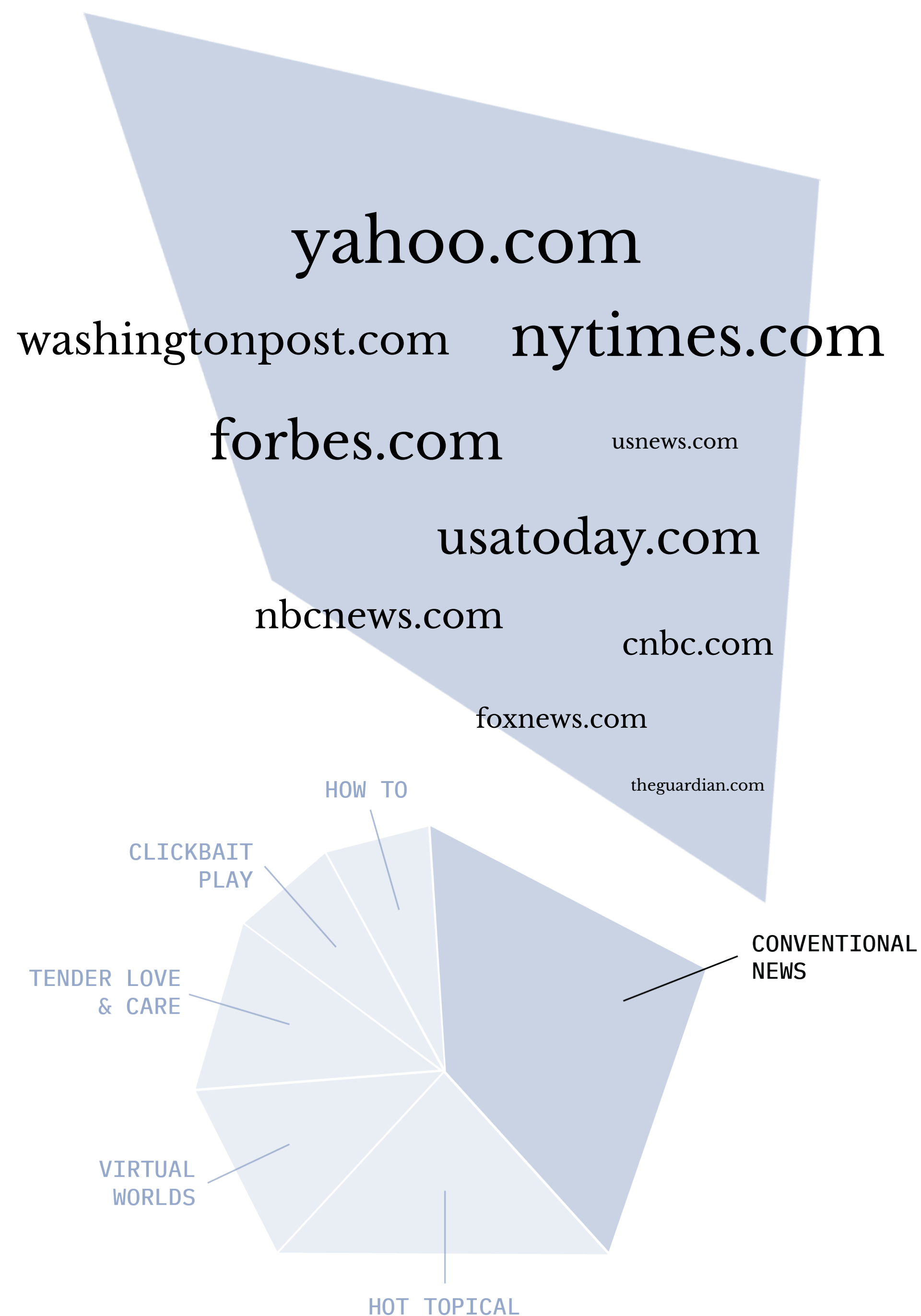
Because of this, the opt-in data we work with captures audiences' real-time journeys online, across all pathways in online news, YouTube videos, and Reddit subs.

ECOSYSTEM #1

Conventional News

MEDIA: “Conventional News” is dominated by major national written news sources that we all know and recognize: The New York Times, Fox News, and even Reddit subs.

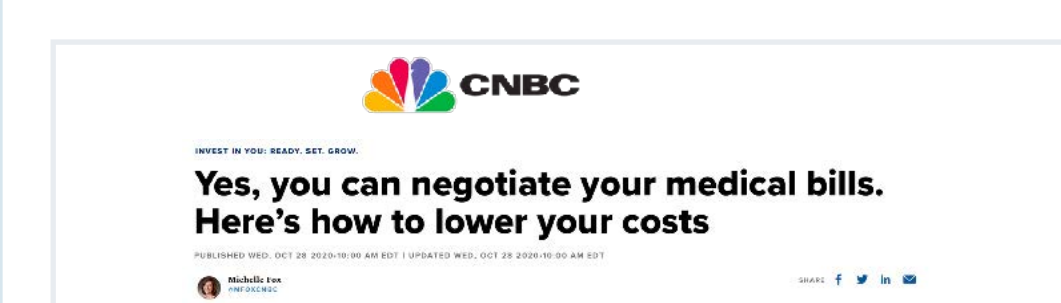
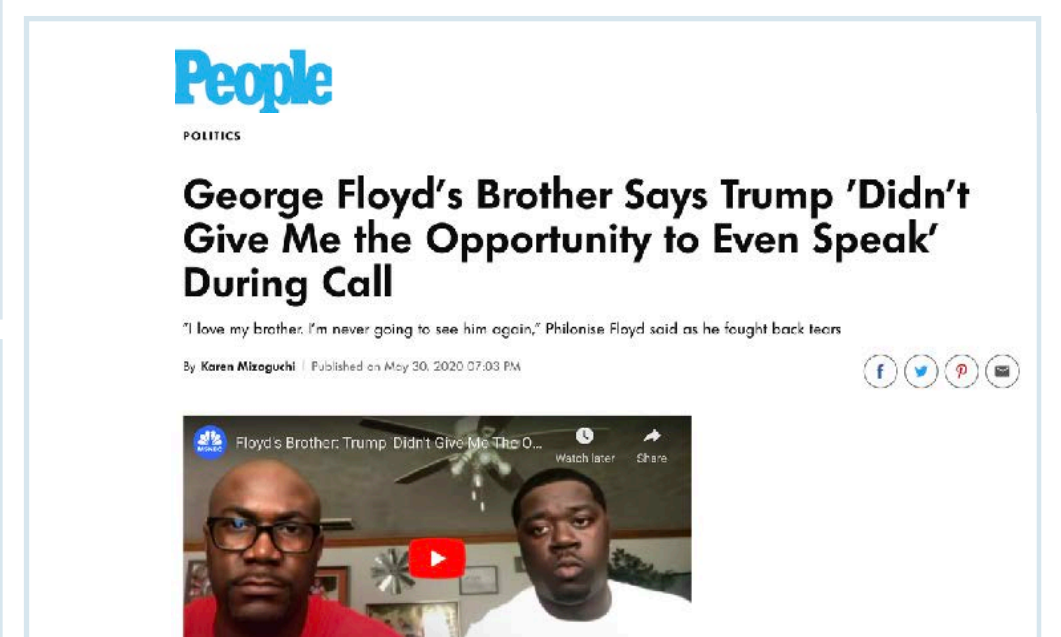
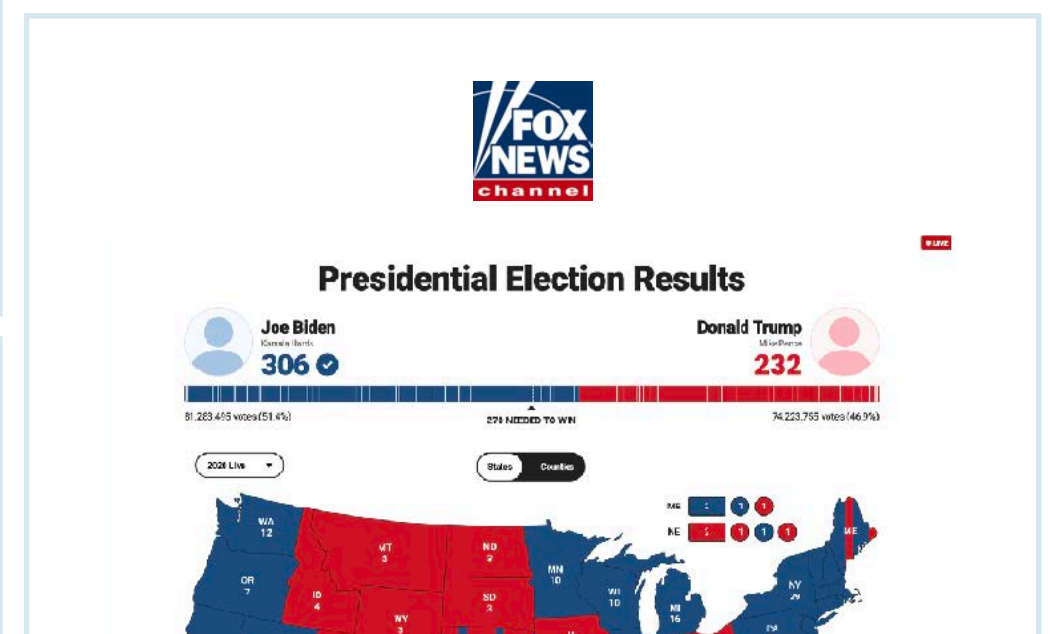
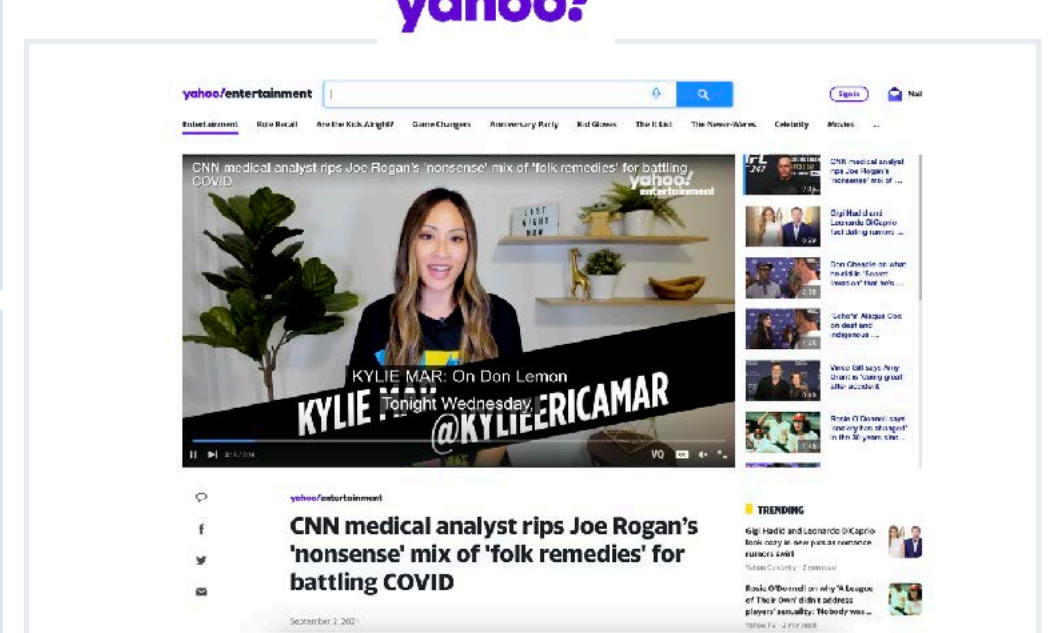
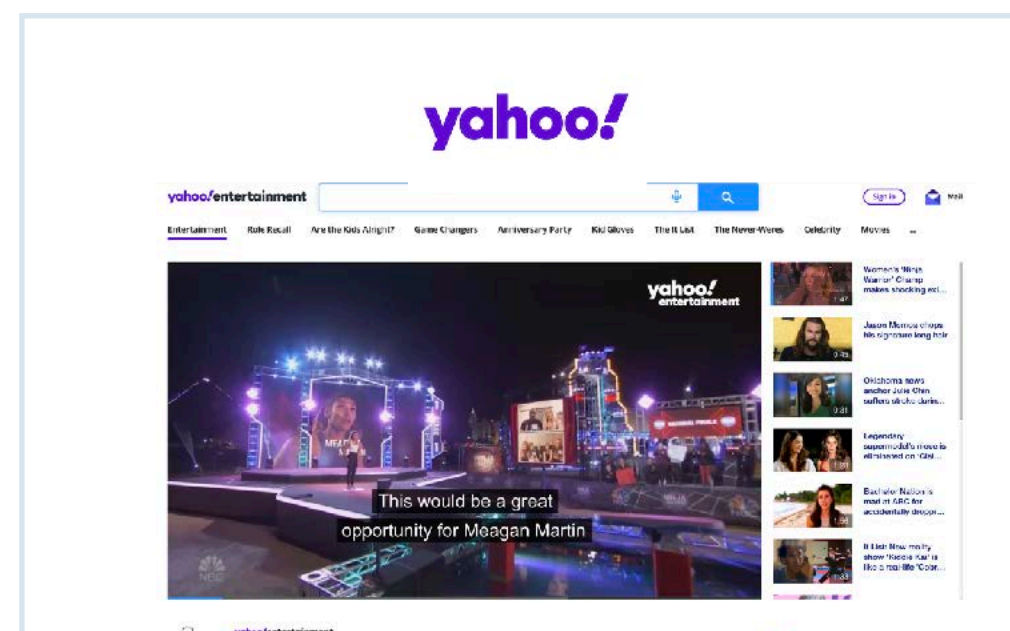
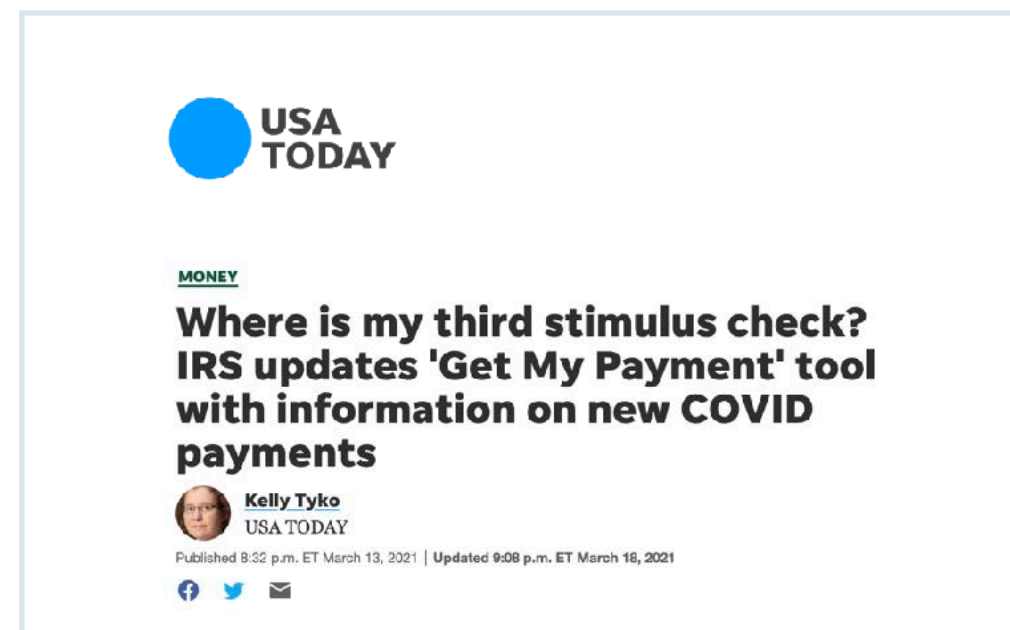
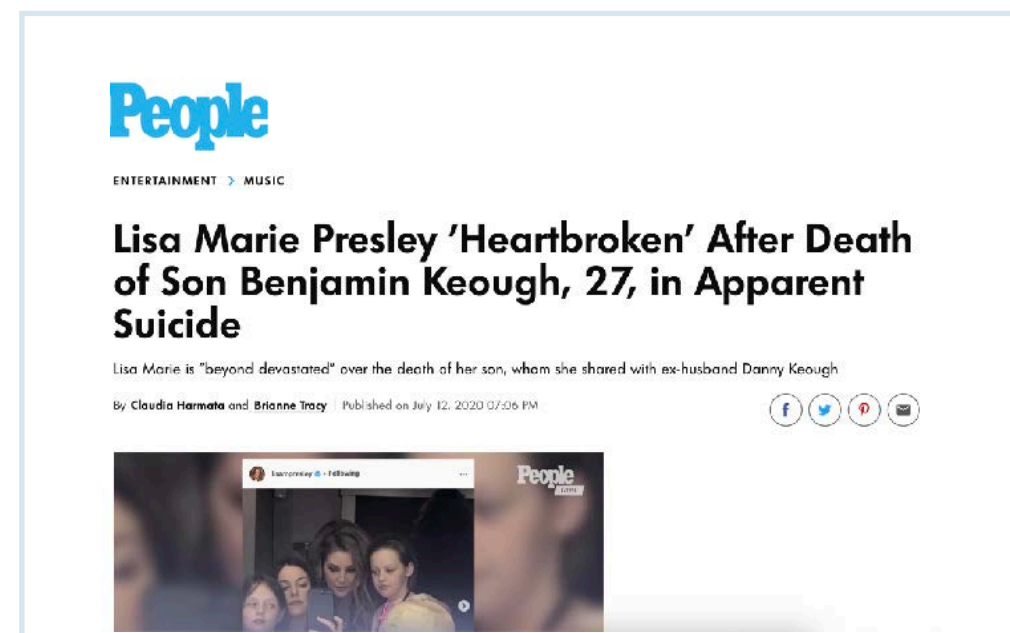
INFORMATION: Conventional News online is an ecosystem that bounces audiences back and forth across sources, but not across media formats. It is more common for users who consume digital written news on one site to consume digital written news on another site than it is for them to consume digital written news from the same brand and also in video form on YouTube. For instance, over the study period, 3% of all users visited nytimes.com and foxnews.com on the same day. Just 0.06% of users visited nytimes.com and also saw something from The New York Times on YouTube on the same day.



ECOSYSTEM #1:

Conventional News Op-Ed

The Op-Ed Opportunity: The Op-ed! There is no need to do anything “new” to reach Conventional News audiences. And, simply adding more conventional news to this ecosystem will not engage new audiences who are not already reading it.



ECOSYSTEM #1

News... or Not News?

While a common assumption is that specific stories or topics engage specific audiences, what we actually found was that audiences are not choosing topics or social issues, they're choosing whether or not to consume news at all.

For audiences who do choose news, there are some news sites that tend to group together, but these do not necessarily emerge as a result of audiences choosing content they already agree with. Rather, these news groups are at least partly defined by huge news hubs, which means that:

- Big national stories reach everyone who consumes news through the major properties (like NY Times, Breitbart, Fox News, etc)
- Forces like financial investment can push content in front of people. While people may frequent different corners of the broader media ecosystem, it is rare to see people exclusively confined to a small handful of properties



ECOSYSTEM #1

Filter on Property, Not Partisanship

NEWS SITE	DAILY AVG REACH
yahoo.com	22.9%
cnn.com	10.4%
nytimes.com	7.9%
foxnews.com	7.0%
washingtonpost.com	5.3%
usatoday.com	4.0%
people.com	3.7%
aol.com	3.2%
nbcnews.com	3.2%
nypost.com	2.7%

In this Conventional News ecosystem, there are huge, high-reach news hubs like CNN and Fox News, masses and masses of tiny properties like a local news site, and a handful of medium-reach properties.

The high-reach properties in a social network (think Elon Musk, Donald Trump, CNN, NY Times, Fox News) are not just twice as important as the next most prominent voices, but are instead 10, 100, or 1,000 times more prominent.

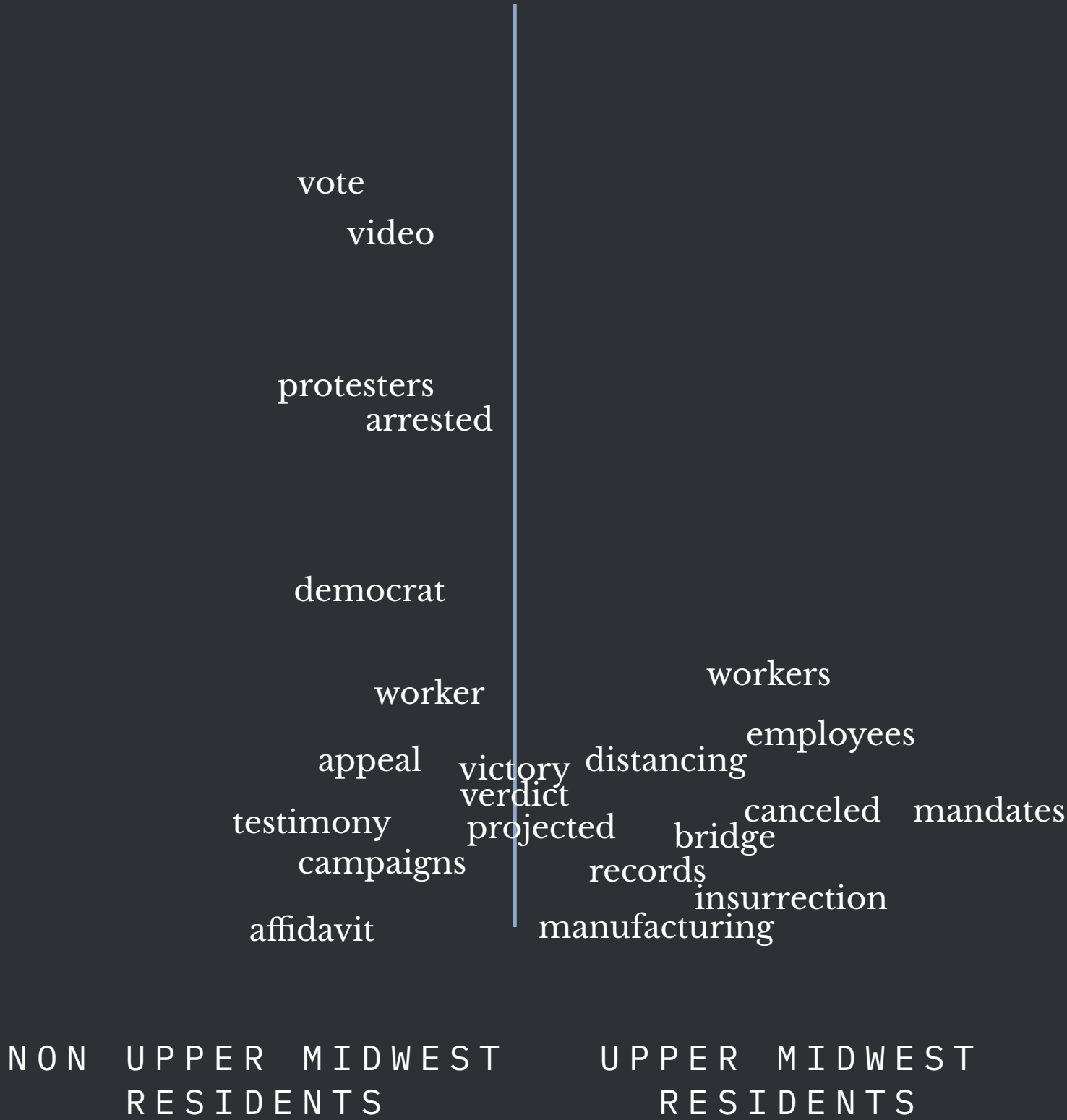
In other words, stories from all the high-reach properties, across all political affiliations, have the potential to reach everyone reading the news.

What this means is that when looking for civic engagement opportunities, filtering media on partisanship is far less useful than filtering on medium and platform. In Conventional News, most people are reading stories from across the political spectrum.

ECOSYSTEM #1

Local News?

WORD FREQUENCY IN HEADLINES



The top media sites being consumed in the Upper Midwest are national news sites, not local ones. But local news is still reported on and locally consumed, and there’s some local news site engagement. Residents from Michigan, Wisconsin, Minnesota, Pennsylvania, Ohio, and Missouri tend to consume online news articles with these states in their titles at a much higher rate (41% versus 18%), for example. And, while nonresidents mostly get these types of articles from major news sites, like foxnews.com and yahoo.com, many residents seek them out on local newspaper, TV, and radio sites, like wkbn.com, freep.com, cleveland.com, patch.com. fox8.com, and startribune.com. In addition, the state-themed articles residents consume tend to concern daily living: COVID policies (“distancing,” “mandate”); weather and transportation (“ice,” “bridge”); work (“workers,” “employees”). Whereas, when nonresidents consume state-related news, articles more frequently feature issues through a national lens, foregrounding divisive political figures and partisan conflict.

ECOSYSTEMS

ECOSYSTEM #1

Local Conventional News

Posts Wiki

Hyperlocal Reddit subs are popular, although each individual channel, by design, is low reach. All of these local Reddit channels are connected to the Conventional News ecosystem which means that Reddit subs such as [/StLouis](#), [/Columbus](#), and [/Detroit](#) are all most frequently consumed by people who consume other, more formal written news.

This is not just a matter of form (written vs. video). There are important Reddit channels in other ecosystems. [/Discordapp](#) and [/anime](#) are high reach Reddit subs in the Virtual Worlds ecosystem, for instance, but the local Reddit content is most interesting to people who are interested in conventional journalism.

denwood Park 3 months ago

Marketplace Thread (Updated Every Monday)

denwood Park 2 months ago

2 Election Info / Voter Registration Info &

rs ago

g to Downtown Saint Louis. What should I know?

y partner are turning 20 this year and are Embarking in a new

About Community

/r/StLouis is dedicated to the news, events, and weird food of the Greater St. Louis and surrounding areas. Please check out our sidebar and wiki for a plethora of knowledge.

136k Members763 Online

Created Dec 9, 2008

r/StLouis Rules

1. No Personal Attacks or Harassment

2. No "For Sale" Posts

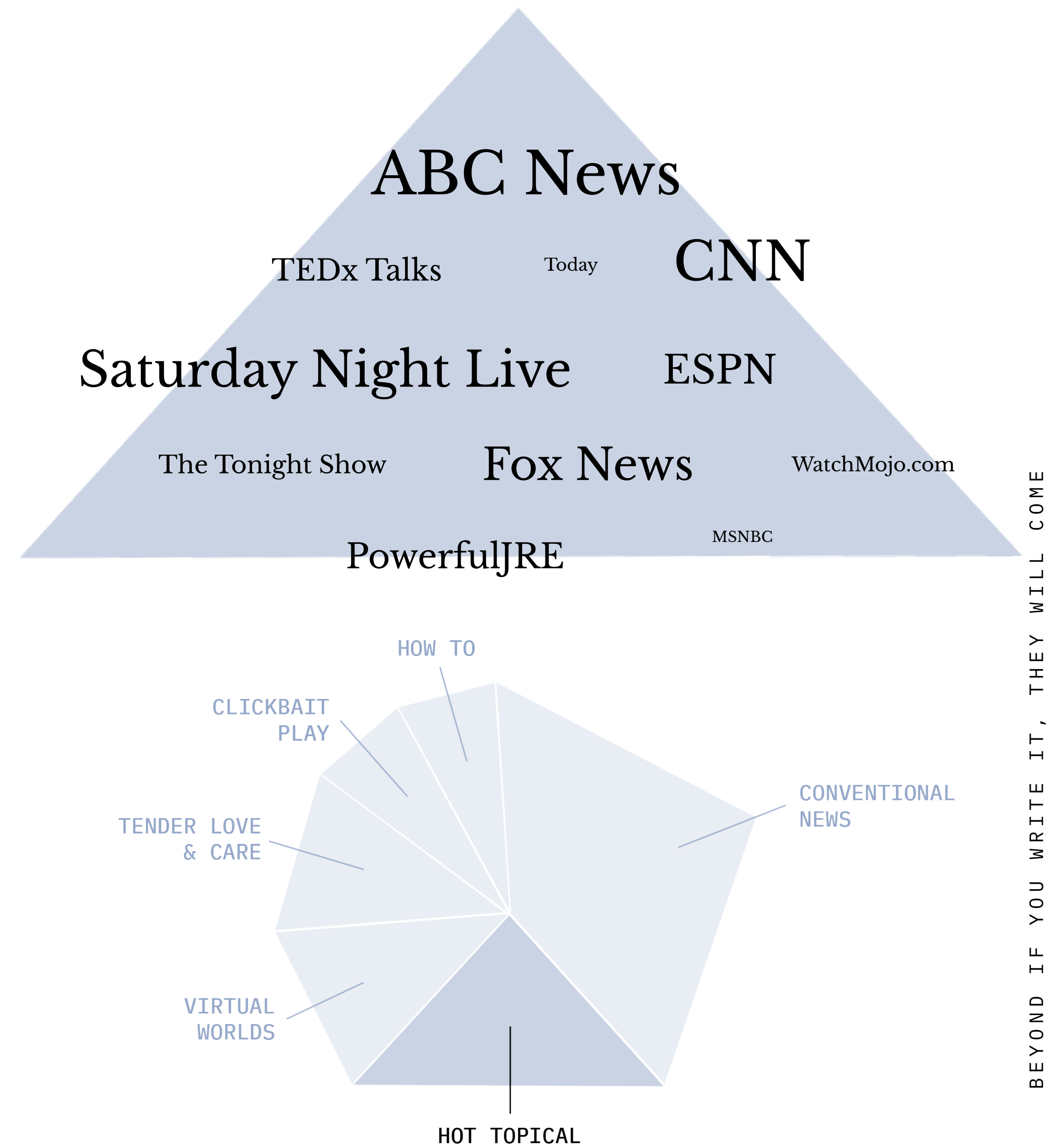
BEYOND IF YOU WRITE IT, THEY WILL COME

ECOSYSTEM #2

Hot Topical

MEDIA: Though also news-oriented, this ecosystem marks a separation between media that is read vs media that is watched. This ecosystem is driven primarily by “hot takes” (a deliberately provocative style of commentary like Joe Rogan and Steven Crowder) and comedic analysis (like Key and Peele), rather than facts and current events. Also important here are sports like ESPN and NFL, “cozy” feel-good content like the TODAY show, and stand-up or Saturday Night Live. Audiences are here for the entertainment more than the information.

INFORMATION: Audiences here aren’t into current events for their own sake, but are brought to current events or civic information through channels that primarily serve interest-based newsy content like entertainment and sports news.



ECOSYSTEM #2:

Hot Topical Op-Ed

The Op-Ed Opportunity: In some ways, this whole ecosystem of hot takes is the modern Op-Ed, but it's a lot lighter on the journalism and a lot heavier on the (frequently intentionally shocking) editorial than the analysis offered in the New York Times, for instance.



Local Hot Topical

Midwest-specific content is fairly rare in the Hot Topical ecosystem—just 2% of all user encounters with YouTube channels in this ecosystem concerned these states. Midwesterners themselves only barely over-indexed on this Midwest-specific content and there were no individual videos at all that over-indexed for Midwesterners.

But there were videos that were particularly interesting to people outside the region including [this video](#) about the trial of Kyle Rittenhouse and [this video](#) about a protest [content warning: concerns gun rights activism and denigrates anti-racist activists].

ECOSYSTEM #2

Non-Local, Across the Political Spectrum

This entire ecosystem is non-local and is full of hot takes on both the Left and the Right—but major national news brands still dominate here: Fox News, CNN, and MSNBC. Reiterating our insights on the nationalization of local news, while local stories were not high reach within local audiences, there were videos about the Upper Midwest that were particularly interesting to people outside the Upper Midwest.

So while videos in this ecosystem aren't tagged with regions for those regional audiences, they're tagged with states and other locations to reinforce narratives about those places, across the entire political spectrum.

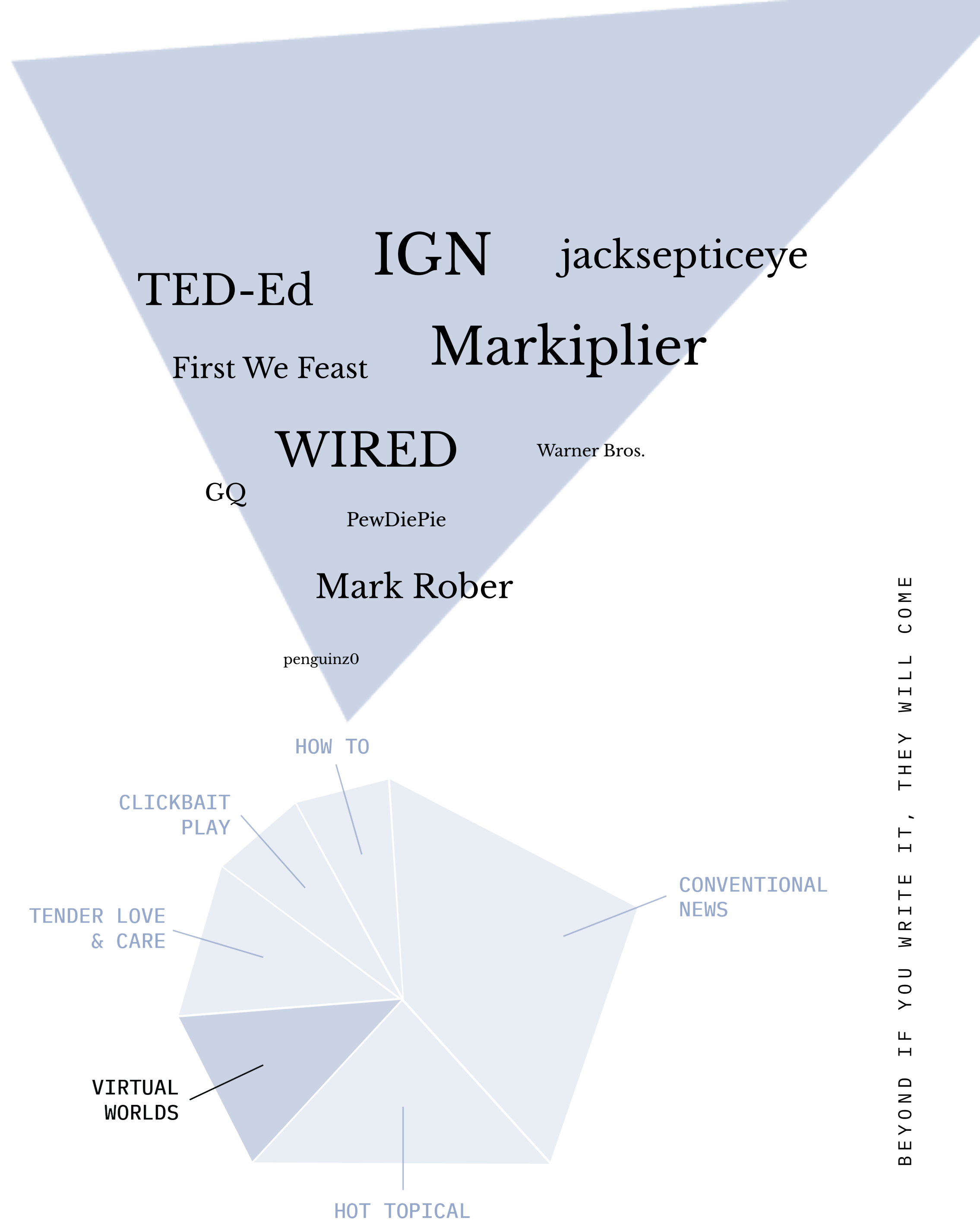


ECOSYSTEM #3

Virtual Worlds

MEDIA: This ecosystem is about fantasy and gaming, and comedic political commentary. Philly D, WIRED, and Kurzgesagt are the highest reaching channels here. Audiences are interested in the real world, but they want to imagine it as it could be in all their fantasy worlds.

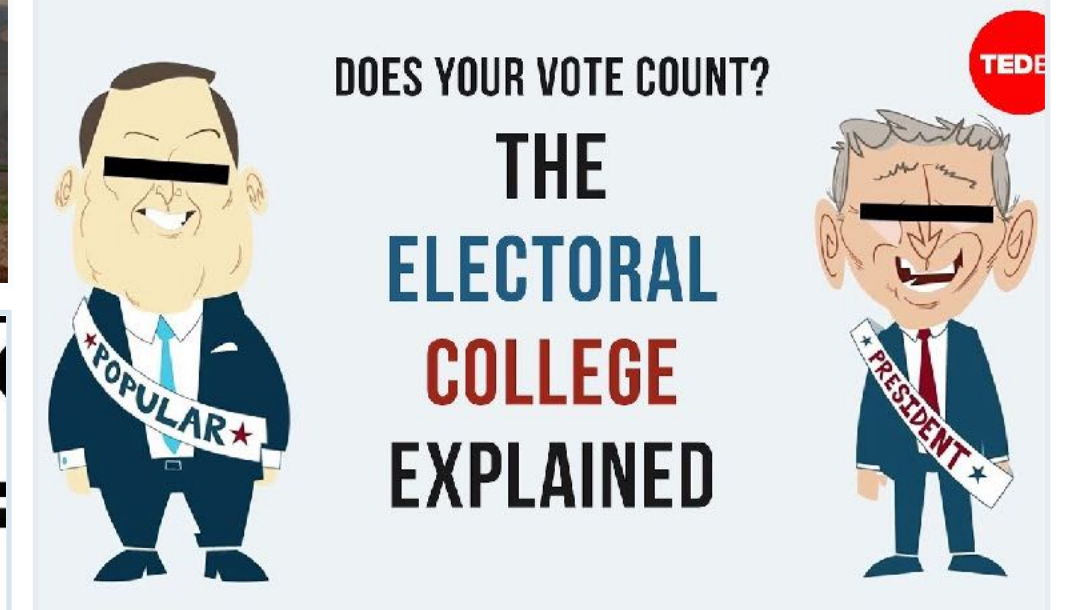
INFORMATION: These audiences are interested in information, but these videos are often less serious and more fun than news media. However, these ecosystems still carry important information to their viewers and may offer opportunities to communicate information of civic importance as long as this communication is rooted in imagining, via movies, TV, and games, how our world differs from how it could be.



ECOSYSTEM #3:

Virtual Worlds Op-Ed

The Op-Ed Opportunity: From fun, imaginative content comes opportunities to place influential information that is lighter in tone than the hot takes of Ecosystem #2. The audience for Virtual Worlds content doesn't want to know about the world as it is as much as they want to know about the world as it could be. PhillyD has a format a lot like Joe Rogan's, but what makes his content appeal to the audience in Virtual Worlds is a relatively silly vibe that doesn't explicitly center conventional masculinity, as well as not naming and "clapping back" at opposing political commentators.



Local Virtual Worlds

Given much of this ecosystem consists of YouTube and the Midwest-specific content on YouTube in general is very sparse, there are only a few creators whose work specifically appeals to local audiences.

The notable commonality among these distinctive channels is that they all center comedy. [LEGIQN](#) is a top comedy creator from Missouri with a local following, and [one top video](#) features him talking trash at a Call of Duty Tournament. Lou Ratchett is a popular local comedy creator with [videos](#) that parody his Pittsburgh life like [this one](#) about asking for money back from a friend who borrowed it.

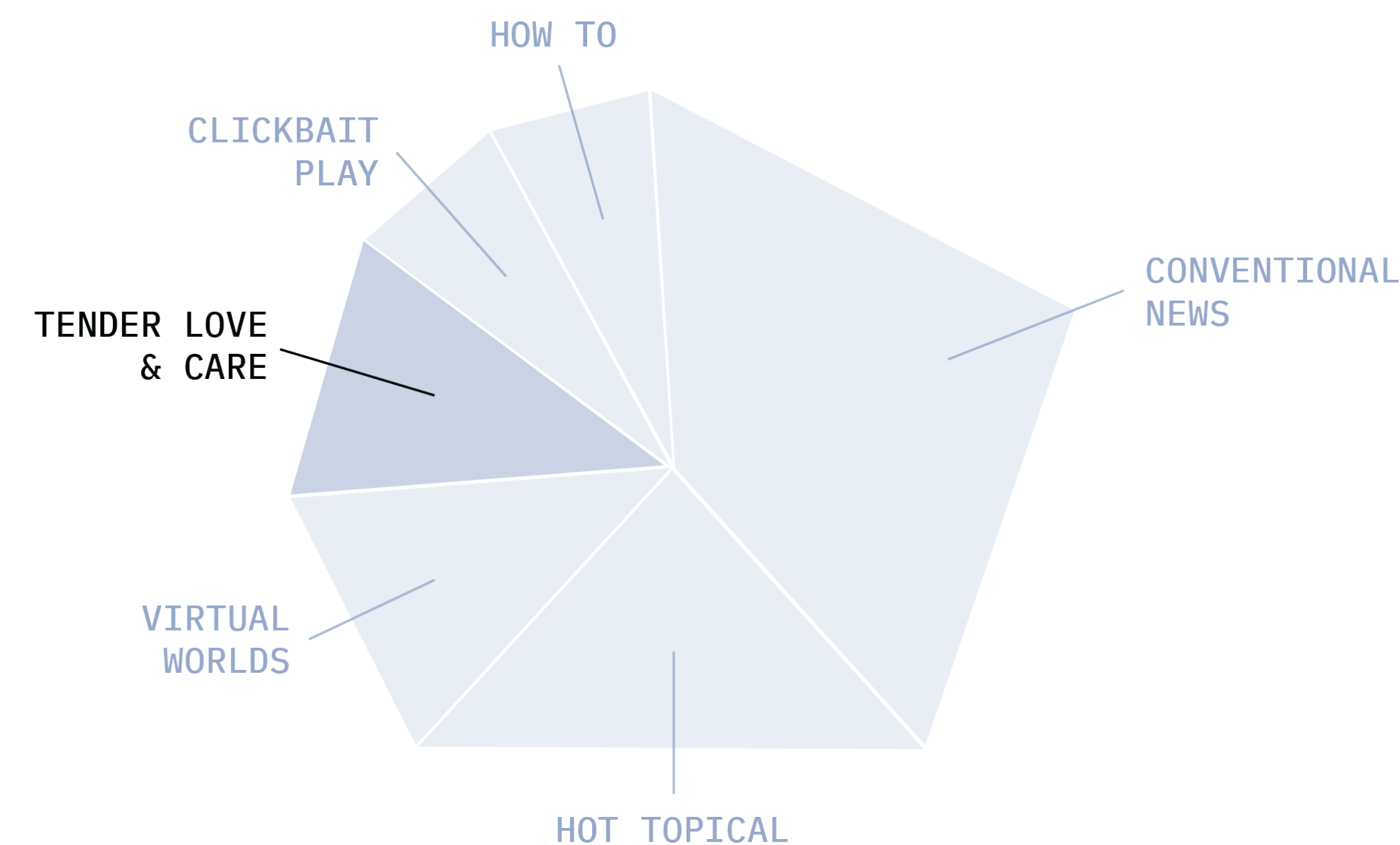
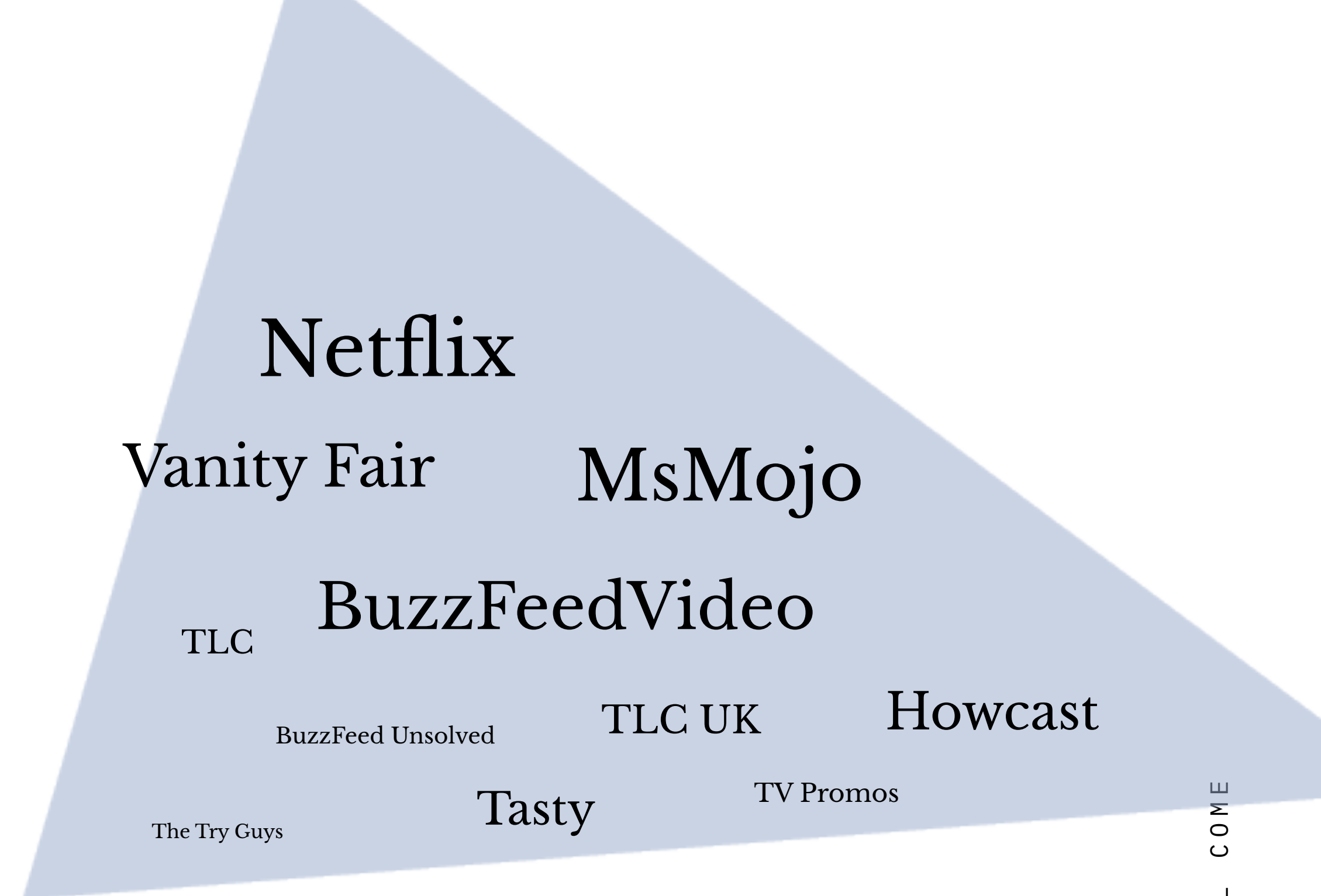
What's important about this distinctively local content is that it's men writing stories about what it means to be young men in their hometowns. Although local "information" isn't popular with any of our Midwestern YouTube audiences, many of them are interrogating what it means to be where they are.

ECOSYSTEM #4

Tender Love & Care

MEDIA: The content in this ecosystem is intentionally intimate and personal. It's packed with information about how to do life, touching on subjects like makeup, budgeting, making iced coffee, getting pregnant, making and keeping friends, or organizing your sock drawer. Almost all the content is personality driven; the creators are sincere, and they project as friends to their audiences, not as role models.

INFORMATION: Creators in this space do regularly interrupt their own content streams to comment on important civic issues, especially racism, gender issues, and other identity concerns.



ECOSYSTEM #4:

Tender Love & Care Op-Ed

The Op-Ed Opportunity: Personal, local relationships are at the heart of the Tender Love & Care ecosystem. This audience is deeply curious, and navigating the close bond that viewers feel with creators in this space offers a comfortable, safe opportunity to directly address social issues, just as the Try Guys periodically speak to issues like race, gender, and sexual orientation.



Local Tender Love & Care

A personal relationship with the source of information is the hallmark of this entire ecosystem—everything here is niche, personal, and intimate. That makes it a good space for the seriously local, and there are many distinct personalities who mention one of the states of interest and are uniquely appealing to people in those states.

Simple Sustainable Living centers Christian faith in a project to grow food in Michigan. Missouri Star Quilt Company supports quilters in Missouri and the Midwest through intimate videos with experts. The Ohio Department of Education shares information about reading.

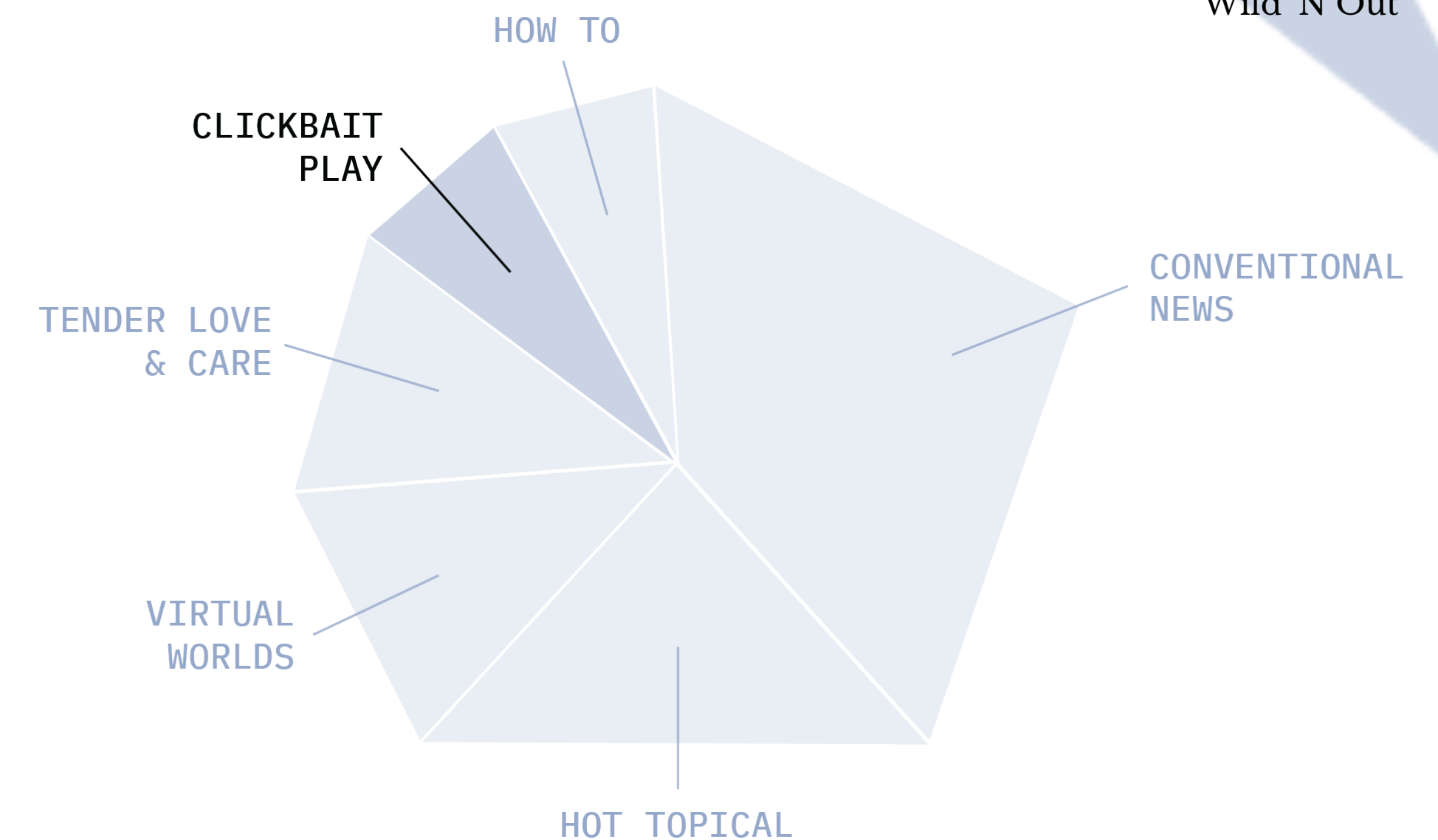
These personal, local relationships are at the heart of very civic information that reaches this ecosystem, like this video from Katherine Henry who advocates, among other things, against COVID masking requirements. The audience for this content is deeply curious.

ECOSYSTEM #5

Clickbait Play

MEDIA: This ecosystem contains some of the most “traditional clickbait” content on YouTube, with bold, loud headlines and thumbnails featuring creators in extreme or highly dramatized situations. These videos are about fast food, thrill rides, or exciting events. Creators like Mr. Beast, Dhar Mann, and SsniperWolf dominate this ecosystem.

INFORMATION: One creator, Mr. Beast, has made an explicit effort to include more social information in his content with videos about cleaning up the oceans and planting trees. And yet, his content is simultaneously empowering and potentially trivializing. His content rarely connects his individual philanthropic actions to root causes or systems that need to change.



MrBeast

Shadow Music

Lyrical Lemonade

SSSniperWolf

FGTeeV

CoryxKenshin

MrBeast Gaming

Ryan's World

Cocomelon

Sesame Street

Wild 'N Out

BEYOND IF YOU WRITE IT, THEY WILL COME

ECOSYSTEM #5

Clickbait Play Op-Ed

The Op-Ed Opportunity: These audiences want to participate directly in the interrogation of what's important and what's changing. The success of Mr. Beast's highly action-oriented content shows that they may also want to feel empowered to do things about social issues, not just to learn things.

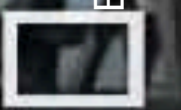
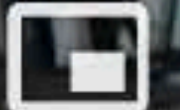


Local Clickbait Play

Sports appears in Hot Topical and Virtual Worlds, but *play* appears in this ecosystem—the playful local content with local appeal is the University of Michigan marching band or Cedar Point roller coasters.

This is not an ecosystem that affords lots of civic content, but it tells us a lot about the information many Midwesterners want. ~20% of some audiences every day are consuming information about what they can do to play: to make something new out of their fast food orders, to find a great thrill ride, or to see an exciting event.

In Virtual Worlds, we saw that layers and layers of gaming content helped frame real world systems as products of games with potential outcomes in imaginary futures. Here, there might be an opportunity to center information about what could change in our democracy in ways that could make our lives more fun.

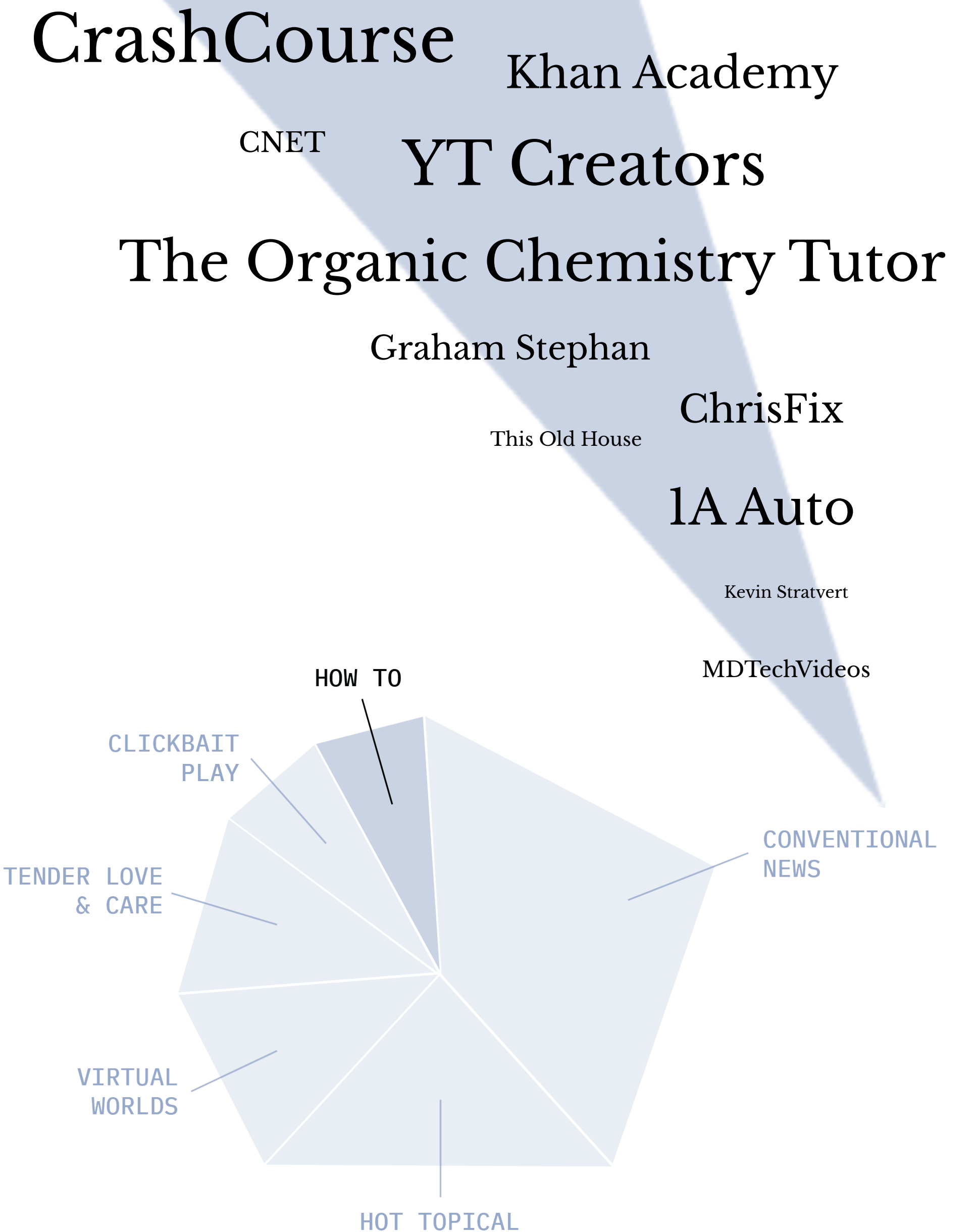


ECOSYSTEM #6

How To

MEDIA: How To shows viewers how to interact with the world around them. However, the How To ecosystem is not event, conflict, or even pleasure driven—it's driven by the everyday necessities of people to make meaningful improvements in the real world around them.

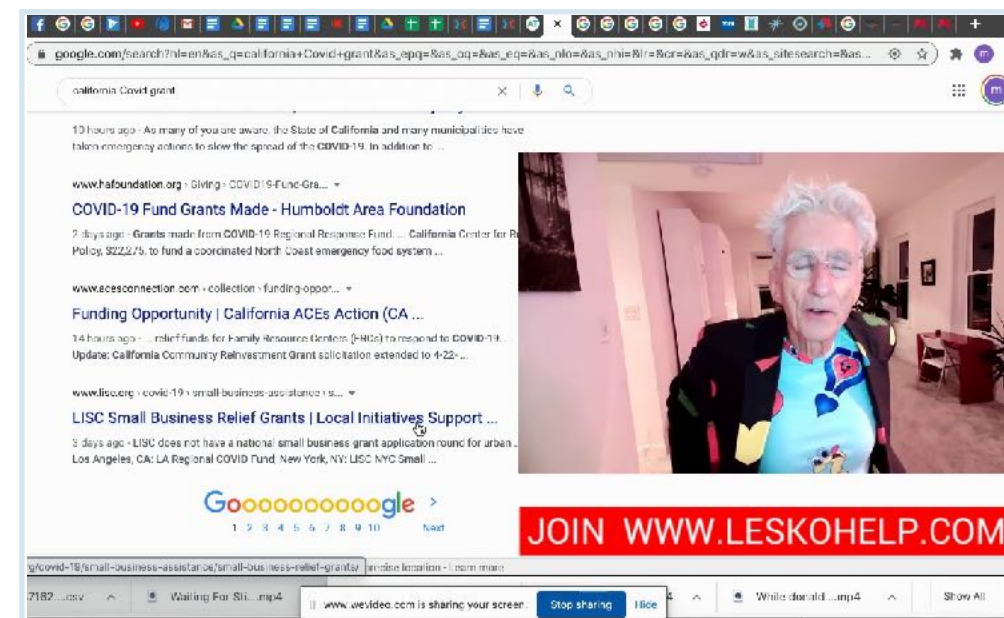
INFORMATION: People watching How To videos know what they want, and want to get there as fast as possible. Some channels like CrashCourse are intended to support students in learning about big abstractions including health and government. These include civic information, but also the foundations we use to comprehend and contextualize that information, like philosophy.



ECOSYSTEM #6

How To Op-Ed

The Op-Ed Opportunity: People here are searching for something specific. Information about pro-social and pro-democracy subjects can't be a detour—they need to be presented alongside answers to quiz questions or solutions to immediate issues, like fixing the garbage disposal.



AGRICULTURAL REVOLUTION



ATP & RESPIRATION

CHEMISTRY & ENERGY



ANATOMY & PHYSIOLOGY

ECOSYSTEM #6

Local How To

Most How To content is not local. But one of the things we ask how to do is to file our taxes, and a couple of the locally interesting videos concerned taxes in Minnesota.

Those people who aren't into conventional news information from Reddit and local news in the Conventional News ecosystem might be searching YouTube for information about how to interact with local government on every issue from absentee balloting to renewing drivers licenses.

Instructionals like these might offer the opportunity to answer the question while reminding the user of the larger democratic context of their government services.

ayer Rights Advocate at the Minnesota
of Revenue and to help you understand



Consumption vs. Intent

Not dissimilar to the How To ecosystem—where audiences deliberately seek answers to specific questions they have about their day-to-day lives—search engine behavior can also tell us about the information people are actually and deliberately looking for.

Search requires intention, usually a purposeful quest to find an answer to a specific question, often urgent. Much like with How To, it's driven by necessity—the specific queries people ask of the internet to get information they know they need.

Breaking It Down

People don't ask questions like "HOW DOES DEMOCRACY WORK". They ask tons of questions about government, but those questions feel like errands, not democracy:

Q STATE OF FLORIDA JOBS

Q NEW BREMEN SCHOOLS

Q SHOULD I USE MY IRA TO DELAY SOCIAL SECURITY

To understand the volume (or lack thereof) of people seeking civic information via search, we looked for signals about what topics or issues people are intentionally seeking out.

The biggest takeaway? People are looking for information that concerns their day-to-day lives, not searching for civic information or anything like what a traditional op-ed would communicate.

Intentional civic engagement online is errands (emissions testing, post office, pool hours), not issues.

We looked for evidence of special audience interest in three topics: voting, parenting, and climate. We found:

➤ Voting is common only around election time.

➤ Parenting is common all the time.

➤ Climate hardly ever comes up.

Conclusion

This project began by interrogating the common assumption that local media's role in communicating civic information is dwindling. What we found: local news is far from dead, but audiences are engaging with it in totally new ways. For advocates, organizers, and communicators wanting to identify the op-ed for today's audiences you must:

- Identify the specific audience segments you wish to reach, not through traditional demography but via the shared cultural spaces these audiences inhabit.
- Determine their format of choice—i.e. are they “readers” of media or “watchers” of media
- Focus on the most popular platforms where your audiences spend time vs. on particular topics or issues

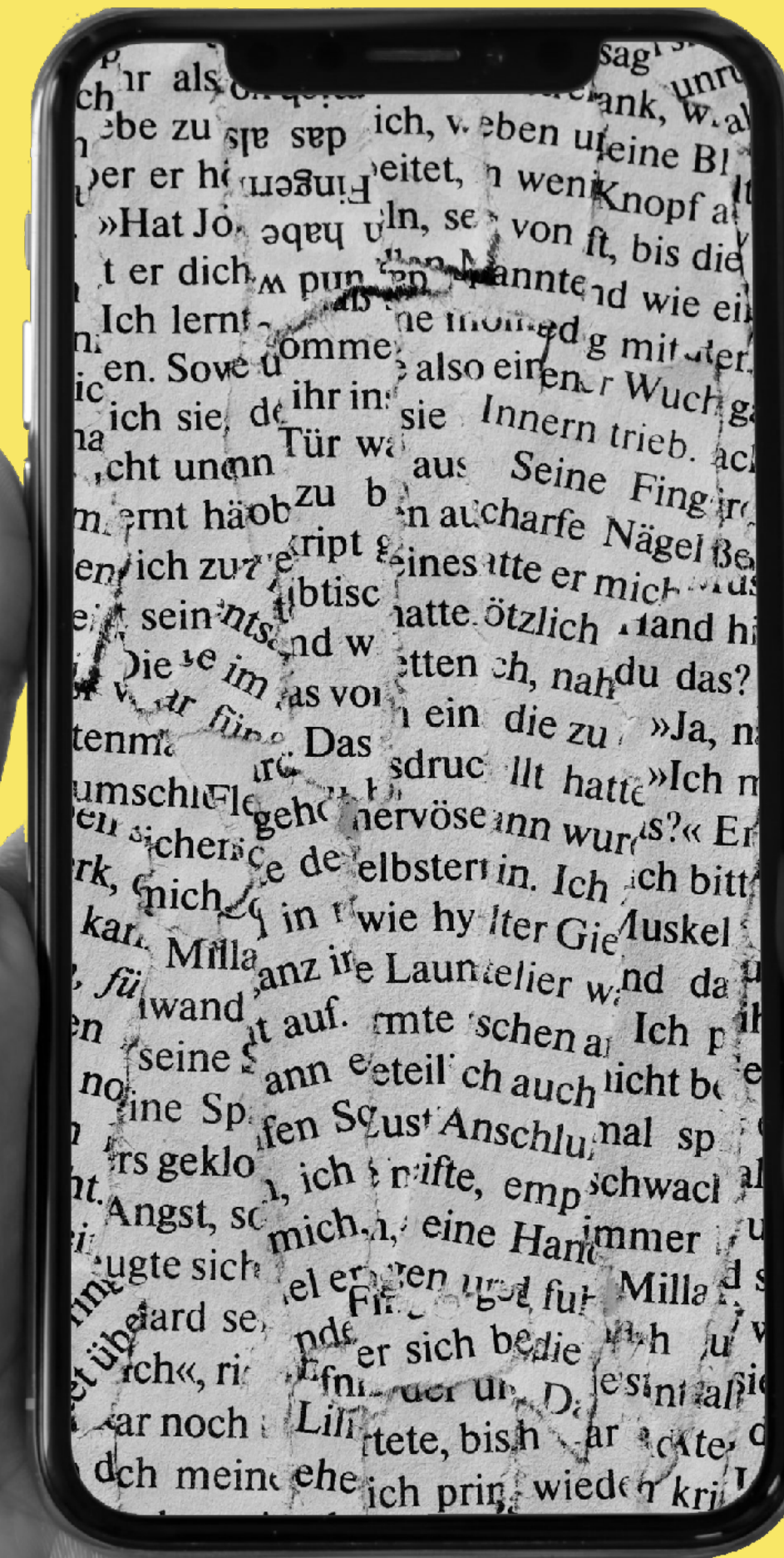
In short: meet audiences where they are with locally-relevant, civically important content that is authentic to the places and spaces they already inhabit, rather than a more traditional one-size fits all “write it and they will come” approach.

➤ For more detailed findings, contact us at info@harmonylabs.org to explore our in-depth research.

SEPTEMBER 2022

Thank you

“



HARMONYLABS

harmonylabs.org
info@harmonylabs.org

311 W 43 St, 12th Floor
New York, NY 10036
+1 212 966 7606

➔ Riki Conrey
Science Director
riki@harmonylabs.org

➔ Jon Stewart
Senior Data Scientist
jon@harmonylabs.org

➔ Brian Waniewski
Executive Director
brian@harmonylabs.org