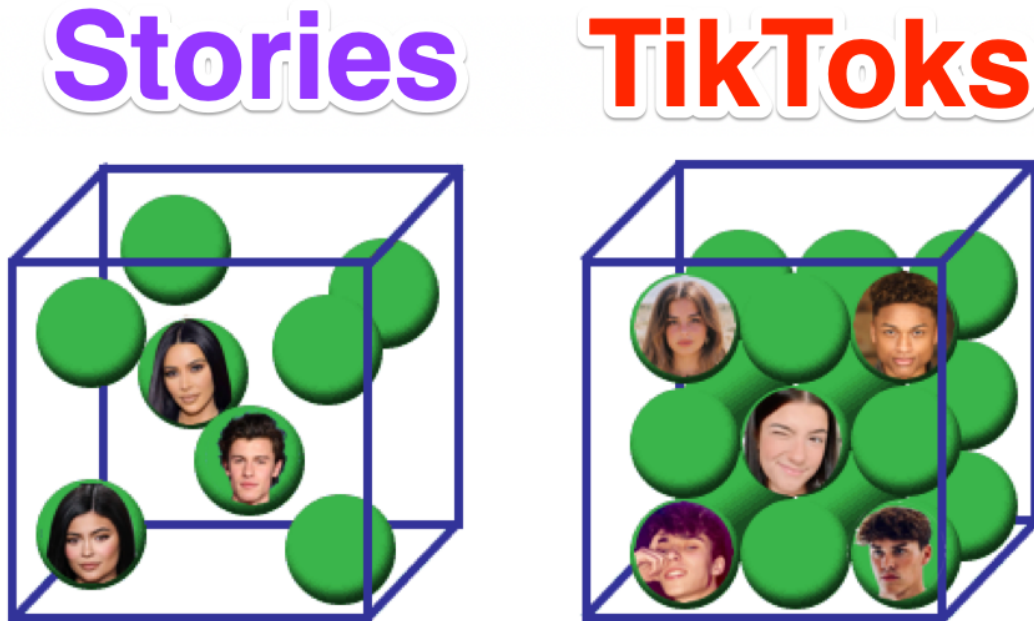# Content density: Why TikToks trounce Stories

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11-14 minutes

What would you rather watch if you only have 15 seconds? A spontaneous pan across a landscape? Or a meticulously storyboarded skit? One takes orders of magnitude more time, effort, and creativity to make, yet both can be consumed equally quickly.

I define Content Density as the entertainment value of a piece of content divided by its length — how many oohs, ahhs, huhs, or hahas per second.

Content Density is a measure of broadcast efficiency. The higher the density, the faster and more frequently the content delivers on its purpose of being cute, informative, inspiring, impressive, alluring, or funny.

The central trait of premeditated micro-entertainment apps [which I recently ranked]] like TikTok, Reels (Instagram), Triller, Byte, and Vine is high content density. To delight a global audience, win the favor of the algorithm, and go viral, content must be as dense as possible. That's in contrast to the happenstance autobiographical social media of Stories, the ephemeral format pioneered by Snapchat and perfected by Instagram.

We already seek out this content density in other mediums. A tightly edited YouTube video is typically more engaging per second than a recording of a meandering live stream. A big-budget prime time show beats public access television. A methodically researched essay or deeply reported scoop beats a frantically-written hot take. A song beats a jam session. Being brief with a big budget isn't enough, as Quibi's flop has demonstrated. But we reward time *deftly* spent with time given. High content density services rule mobile engagement.

This is why I believe micro-entertainment creation will grow rapidly and could rival or even cannibalize Stories creation and consumption.

Micro-Entertainment vs Social Media

An amazing improv moment serendipitously caught on camera can have high content density, but more often this quality comes from putting in the work. That could mean writing an original script, even if only in a creator's head, rather than ad-libbing. Or it could mean remixing another piece of content, painstakingly lip-syncing the words, or mirroring the concept while adding a new spin.

Creators recognize high density before they're even done producing the content. They perceive its potential, goading them to put in the extra effort to reshoot that scene, rewrite that line, scout that location, build that prop, nail that dance, try that effect, and perfect that edit. It's common to see TikToks captioned with "I spent too long making this, don't let it flop" to explicitly communicate that the content density within is worth the audience's time, even if the investment in production is subtle. Conversely, when you know you're not making something special, just chronicling your day, there's no point in going to all that trouble optimizing.
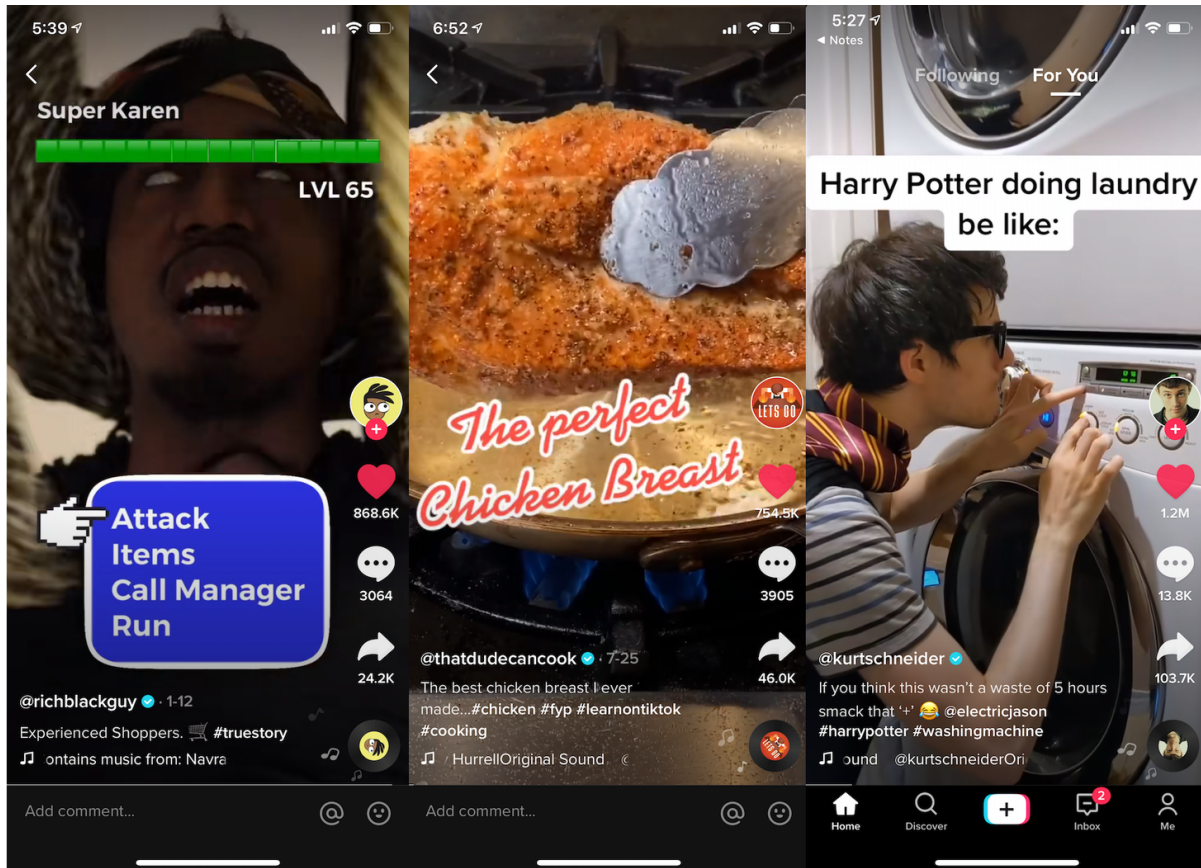
(Here are a few examples of high content density TikToks that took a ton of effort to make)

This doesn't mean every second of video has to be overstuffed with excitement. A moment of suspense or slow crescendo can enhance the climax. Like a song, the beauty doesn't come from adding more notes, but from compositional harmony.

But if a creator truly respects their audience's attention, they cut out the noise and deliver pure signal. The rise of separate apps or sections of them for Toks and Reels makes this distinction between micro-entertainment and social media content explicit. Instagram's product director Robby Stein who is overseeing Reels has embraced this dichotomy, saying "It's our hope that with this format we have a new chapter of entertainment on Instagram."

Falling In Love With Strangers

Micro-entertainment has such high content density that it overrides another key factor that determines our preferences: the principle of familiarity. This design tenet states that we like things more if we're familiar with them. Familiarity, along with alignment with our interests and timeliness, combine to determine a piece of content's relevance.

Familiarity can make objectively boring content subjectively interesting. All things otherwise equal, we're more interested in a text, photo, or video of a friend than a stranger. (A related principle of homophily manifests around remixed micro-entertainment, where recognizing the soundtrack or meme concept can make a video feel palatable.)

Familiarity explains the popularity of and behavior patterns around social media Stories. This seemingly mundane, low-density content from friends is entertaining. That's because it has context, builds on our perception of their identity, and has relevance since a Story could come up in future conversation. Plus, we can easily message the creator in the moment and discuss it with them.
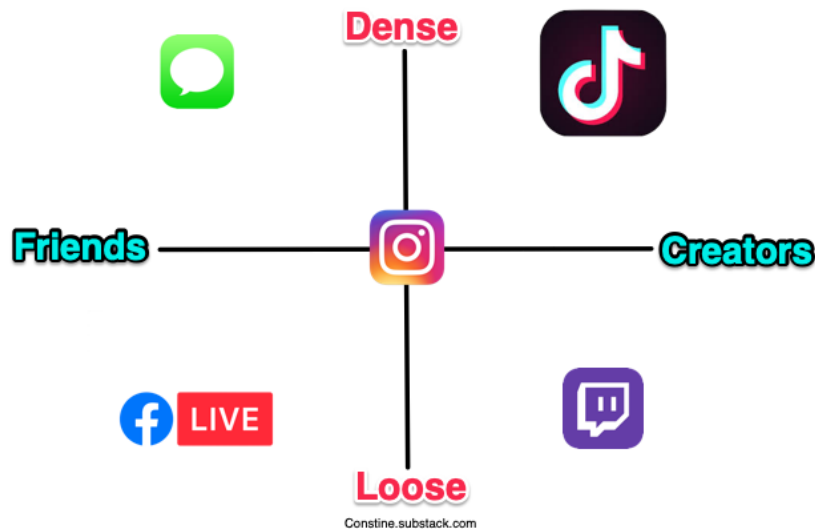
The content of our best friends and family is imbued with maximum familiarity, prompting us to sit through even the loosest content. Remember the pre-social network activity of watching an endless photo slideshow at a friend's house when they got back from vacation?

But even with high familiarity, the exceedingly low average content density of Stories tempts us to rapidly fast-forward through most of them. We devote only a fraction of a second to any given clip, unwilling to invest more time when it's questionable if there will be a payoff. But if we know an acquaintance put in the labor to make micro-entertainment like a TikTok, there's a better probability of density, and we're more likely to give it our attention.

Second for second from the same author, we'd rather watch storyboarded micro-entertainment than haphazard autobiographical social media.

This explains why micro-entertainment is so monetizable, and therefore why TikTok should command such a high valuation. You don't skim this content like tweets or Instagram feed posts because you trust someone put their all into making it. If ads are natively designed to blend in amongst Reels and TikToks, users may linger on them longer than an instinctively skipped Stories ad. The medium trains us to give each piece of content a chance.

Differentiating TikTok and Instagram's Algorithms

The supply of micro-entertainment is constrained by the intense labor necessary to produce it. Many people don't make this content [yet], and if they do, they make it much less frequently than social media. But supply of social media already far outstrips demand.

You probably only watch a sliver of the Stories posted each day by your Instagram friends. The algorithm puts your closest friends and ones you watch most first, but as you tap deeper into your queue, familiarity declines, exhaustion sets in, and you bounce. You might prefer a TikTok from a more distant friend than a Story of a slightly closer one if you've only got a few moments to fill.

More social media users are likely to embrace micro-entertainment creation as they grow inspired by the TikToks and Reels they consume and create them themselves in the pursuit of attention. Meanwhile, there's a near-endless supply of both mainstream and diverse niches of micro-entertainment made by strangers but validated by algorithms measuring the response from millions of other viewers. A TikTok from an unknown creator but in a niche you've shown interest in and that has hundreds of thousands of likes will almost certainly be more enjoyable per second than a Story from anyone except your close friends because of how the algorithms assess content.

Micro-entertainment algorithms test an individual piece of content's quality by monitoring the reactions of dozens or hundreds of strangers, setting a high bar to reach you. Stories algorithms don't get the benefit of testing content on strangers to objectively understand quality, so they typically just rank based on your past interactions with someone across different feeds and chat. That doesn't necessarily predict a particular Story's worth.

The Economy Of Recognition

By sorting content by quality rather than familiarity, micro-entertainment platforms also have a bigger opportunity to identify our niche interests and route that type content to us. When you first try TikTok, it peppers you with variety to hone in on your taste. The algorithm tries to figure out if you're into learning grill tricks from Meat TikTok, fantasy lore on DnD TikTok, or absurd goofiness on Alt TikTok. There's a huge wing of the app just for American history buffs.

Creators in these niches don't have to appeal to the lowest common denominator to viral with mainstream viewers. They can focus on delighting their smaller cadre of hardcore fans. That's why I believe there's a huge untapped opportunity for apps to allow micro-entertainment creators to monetize by accepting tips for recorded content, not just during livestreams.

Fans who feel like creators made something just for their niche interest may be willing to pay them. I've often laughed hard enough at a TikTok to think the creator deserved a few dollars. It's also an easy way for platforms to generate revenue by taking a cut of tips while retaining creators by letting them earn money. And tipping doesn't require platforms to pay out of pocket like TikTok's "Creator Fund", or do the work of brokering sponsorship deals.

This opens up an "Economy Of Recognition" as TikTok competitor Clash's co-founder and former Vine star Brendon McNerney calls it. Creators feel compensated for pouring their heart into making something for their fans. And if apps reward fans who tip with special badges, commenting capabilities, or other perks, it deepens their sense of affiliation with a creator. This alignment of one's identity with a creator is how fans evolve into lucrative cult members, as I detailed in **[[The Rise Of The Step-Chickens]]** -- a cult that all used their charismatic leader's profile picture to take over TikTok's comment reels.

Once you've been exposed to or created high-density micro-entertainment, Stories feel soft and slow. "What's the point? Where's the punchline?" After I got serious about making and consuming TikToks over the winter, I basically stopped posting Stories. Unless I was going to put a ton of love into building multi-part narratives, sharing random art, landscapes, and selfies didn't seem up to snuff.

One last quirk to consider: As you follow and watch more of a creator's micro-entertainment, your familiarity with them rises. Eventually, you could forge an affinity strong enough to imitate friendship, leading you to grow curious about their day-to-day lives behind-the-scenes and follow their traditional social media. The creator morphs into an influencer. And it's this depth of connection that leads loyalists to begin tipping, paying for patronage subscriptions, buying merch, and even joining the cult of this creator.

Micro-entertainment is the top of the funnel — a highly viral gateway drug to a more intimate and thoroughly monetized relationship, luring in casual fans that wouldn't otherwise care about a creator's life. That's why you should expect every aspiring Instagram influencer to be out there polishing their dancing shoes, preparing scripts, and practicing their lines.

Stories were the natural first ubiquitous format for video on social media. Inexperienced and uninspired, we held up our phones, captured life around us, and tried to spice it up after with stickers and captions. But we've evolved, growing more discerning and creative. The result is TikTok and Reels. Under the pressure of our higher standards, we've learned to compress the coal of social media into diamonds of micro-entertainment.

If you're building a startup in the creator economy, our early stage venture firm SignalFire is actively investing in the space. You can reach me with a reply, comment or DM.

A big thank you to the Type House crew including Cherie Hu, Brett Goldstein, Leon Lin, and Brett Bivens, as well as Shreya Sudarshana for generous editing help. Image credit to The Engineering Mindset.

I really love writing this newsletter for you, and would be much obliged if you'd fwd or tweet it! And let me know what I should write about next!