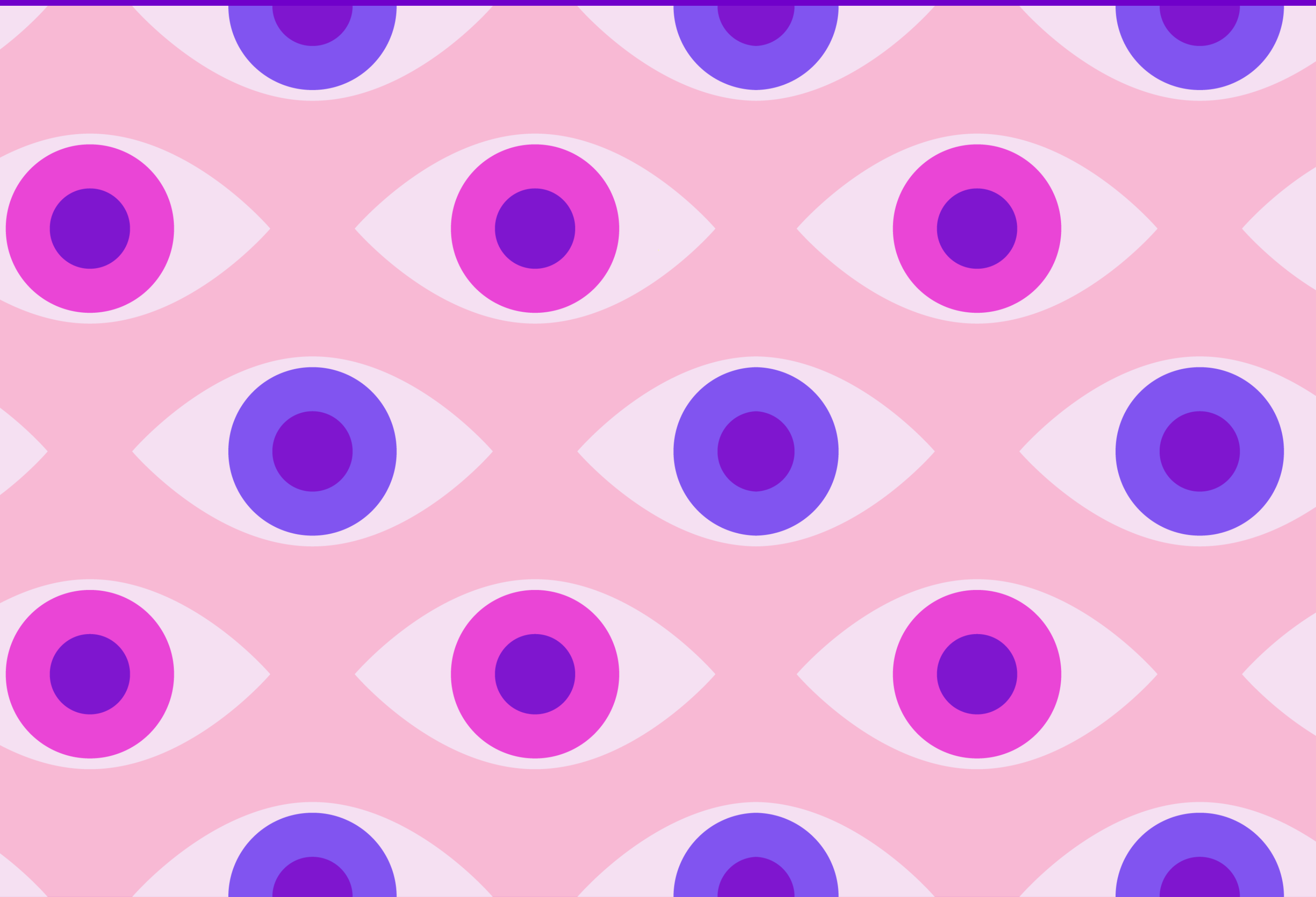


SPECIAL REPORT

The Value of Loyal Viewers

In this report, we're diving into the topic of loyalty and why it's important for media companies to foster a trusted relationship with their viewers.

We'll discuss how loyalty levels differ across various genres and creator types, and what we can learn from the creators with the most dedicated viewers.



Why media companies should care about loyalty

Why should you care about audience loyalty and how it impacts your media company? Here are a few key reasons:

Retention: Reaching new viewers with your content is hard. Costs associated with getting new audiences to watch your content are high, so it's important to focus on delighting and engaging the loyal viewers you have now to reduce churn and spend.

Ad frequency: Having a higher frequency of exposure to a brand across the same, dedicated viewers on your channel can be beneficial for advertisers, since this connection may positively impact brand lift, and therefore your potential to keep working with those advertisers.

Advocacy: Loyal viewers are more likely to recommend your channel to others or share videos with their family and friends, eventually expanding your reach to new audiences.

Strategy: Your most dedicated fans are also likely to be most vocal about what they want to see from your content. As such, you'll know exactly what they want and deliver on it, therefore increasing the cycle of loyalty.

Methodology

In this special analysis, we looked at unique de-duplicated viewership across two consecutive months on YouTube for the top 100 media creators and influencers per genre, based on US unique viewers who met a 30-second quality view threshold.

We also used a benchmark loyalty level as a comparison, based on an average across all content genres.

All of our information is from Feb 2021 data (loyalty is measured by the amount of viewers who have watched in Jan and Feb 2021 consecutively), and therefore reflects a moment in time. Seasonal effects may have an impact on loyalty levels.

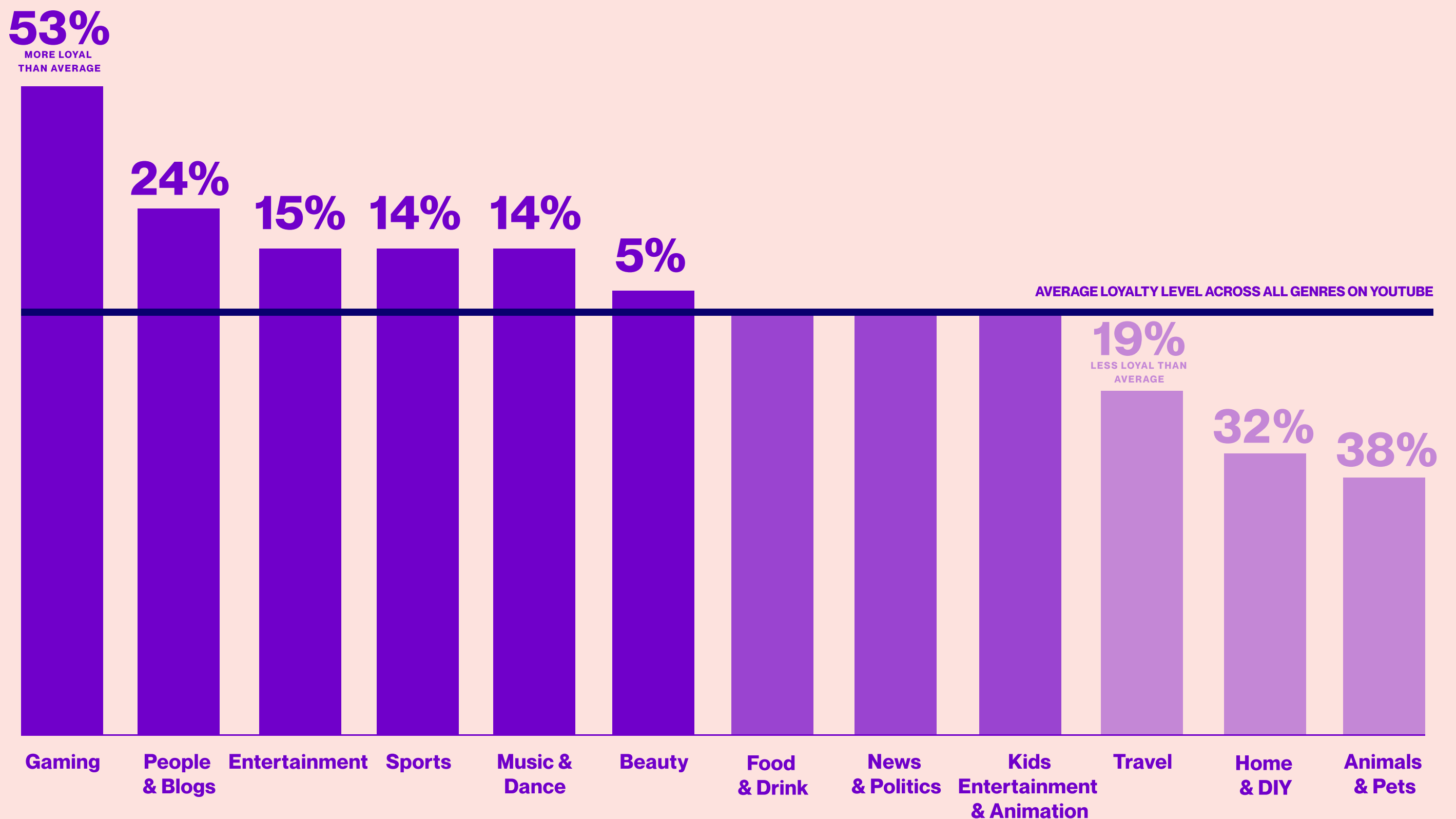
Loyalty differs heavily by content genre.

If you're thinking about what kind of content to make, recognize that channels in certain genres will have more loyal audiences than others.

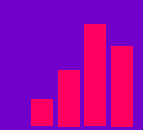
For example, you're likely to see fans of gaming, entertainment, and sports coming back to the same creator in these genres and industries, versus viewers who are casually looking for travel-based ideas for their next trip.

LOYALTY FOR SELECTED GENRES BASED ON TOP 100 CREATORS

COMPARED TO AVERAGE LOYALTY ON YOUTUBE



Source: Tubular Labs | Special Analysis | YouTube | Based on top 100 media creators and influencers by unique viewers in February 2021 | US audiences | Loyalty metric based on unique viewer overlap in 2 consecutive months | Average loyalty based on average across all genres on YouTube | Feb 2021



Entertainment-style content attracts loyal followers while other genres lend themselves better to one-off viewing.

Gaming viewers are >50% more loyal than the average, proving these audiences stick to the creators they like and follow.

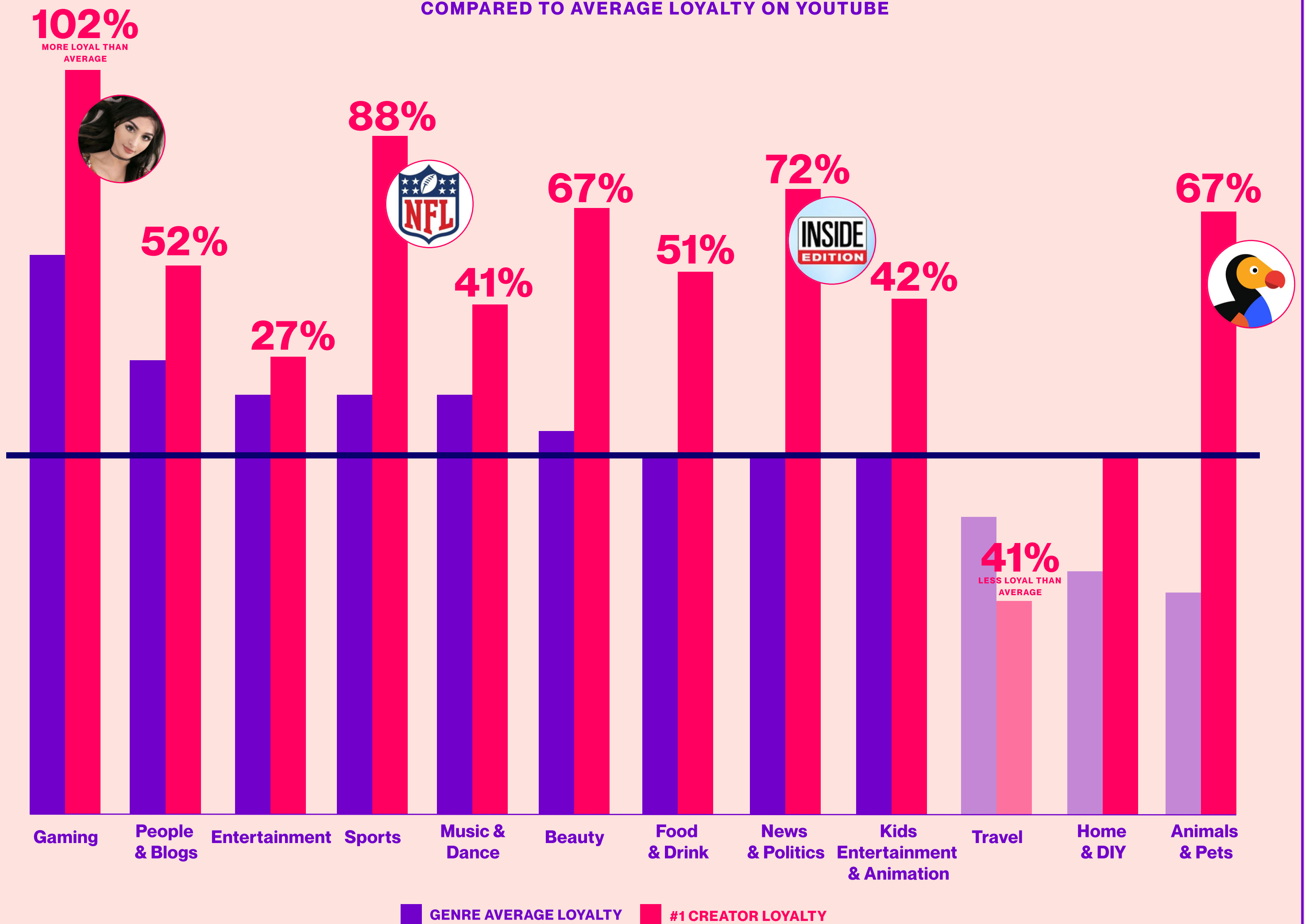
Other entertaining genres like People & Blogs, Entertainment, Sports, or Music also show higher loyalty rates, indicating that people come back to their favorite channels they trust to give them the entertainment they're looking for.

Genres like Travel, Home & DIY, and Animals & Pets channels show a lower loyalty rate than the average channel.

Think of it this way. If a viewer is watching a video about a single travel destination or how to fix a kitchen sink, it's unlikely they're going to need to come back to watch more content once they get the information they need. Essentially, the types of content in these categories lend themselves to one-off viewing.

LOYALTY FOR #1 CREATOR PER GENRE VS. CONTENT GENRE

COMPARED TO AVERAGE LOYALTY ON YOUTUBE



Source: Tubular Labs | Special Analysis | YouTube | Based on top media creators and influencers by unique viewers in February 2021 | US audiences | Loyalty metric based on unique viewer overlap in 2 consecutive months | Average loyalty based on average across all genres on YouTube | Top creators based on reach in Feb 2021 | #1 creators per genre by unique US viewers in Feb 2021: SSSniperWolf, Pooh Shiesty, MrBeast, NFL, WorldStar Hip Hop / WSHH, James Charles, Nick DiGiovanni, Inside Edition, Cocomelon - Nursery Rhymes, DALLMYD, 5-Minute Crafts, The Dodo

Top creators outperform the rest of the genre when it comes to loyalty.

Despite overall genres showing different levels of loyalty, the top creators in these genres have a significantly higher loyalty in most cases.

It's no surprise top creators with the highest reach, who continually deliver great content to their audiences, compel viewers to come back time and time again. This means the better and more consistent your content strategy, the more likely you'll attract advertisers along with loyal viewers.

Some examples include gaming creator SSSniperWolf, who has audiences that are 2x as loyal as the average, while Inside Edition audiences are 72% above benchmark (vs. an average loyalty level for the total News genre).

You can still have a very loyal fan base in a genre that overall doesn't show high loyalty, as evidenced by The Dodo in Animals & Pets.

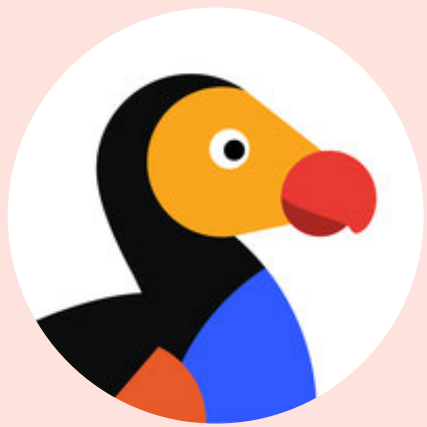
Dependable content that creates a connection leads to loyalty.

We just learned that top creators have high loyalty. Now, let's look at two of these creators to see what makes their content convince audiences to come back for more.

EXAMPLE 1

ANIMALS & PETS

The Dodo makes dependable, repeatable content



Our first example, The Dodo, stands out for creating dependable content with repeating formats and series like *Little But Fierce*, *Faith = Restored*, or *Cat Crazy*.

This gives viewers structure and helps them decide if they want to watch a certain video from this creator. If you liked the last *Cat Crazy* video, for example, you know you'll like the next one and you'll probably tune in to watch it.

Additionally, the majority of The Dodo videos are between 3-5min in length with little variation from this tried-and-true formula.

This formula sets up an expectation: viewers know exactly what they get, and that works for The Dodo to keep their audiences coming back.



Faith Restores Series

Wild Horse Immediately Recognizes His Girlfriend After Years Apart | The Dodo Faith = Restored

12.3M - V30 views
(Top The Dodo video in the last 365 days by V30 views)



Little But Fierce Series

Tiny Baby Stoat Has The Best Reaction When She Meets Someone Like Her | The Dodo Little But Fierce

9.8M - V30 views
(Top3 The Dodo video in the last 365 days by V30 views)

Source: Tubular Labs | Intelligence | YouTube | Analysis of top 25 videos by V30 views for each creator | Videos uploaded in last 365 days | Data as of May 6

GAMING

SSSniperWolf creates an emotional connection



Another way to build loyalty is to create an emotional connection. A great example is the Gaming influencer SSSniperWolf.

She goes beyond live streaming games to address other topics important to her audience: she talks about issues that female gamers might deal with and can relate to, like in her top video in the last year “Mom Says Girls Can’t Play Video Games.”

In her reaction videos, she sticks to the format of talking to her viewers directly and responding genuinely in the moment, creating a connection that feels like you’re watching them with her.



Relatable content viewers can connect with:

TikToks I Watch Instead Of Sleeping

10.2M - V30 views
(within top 10 SSSniperWolf videos in the last 365 days by V30 views)



Addressing female gamer topics creates connection with her audiences:

Mom Says Girls Can't Play Video Games

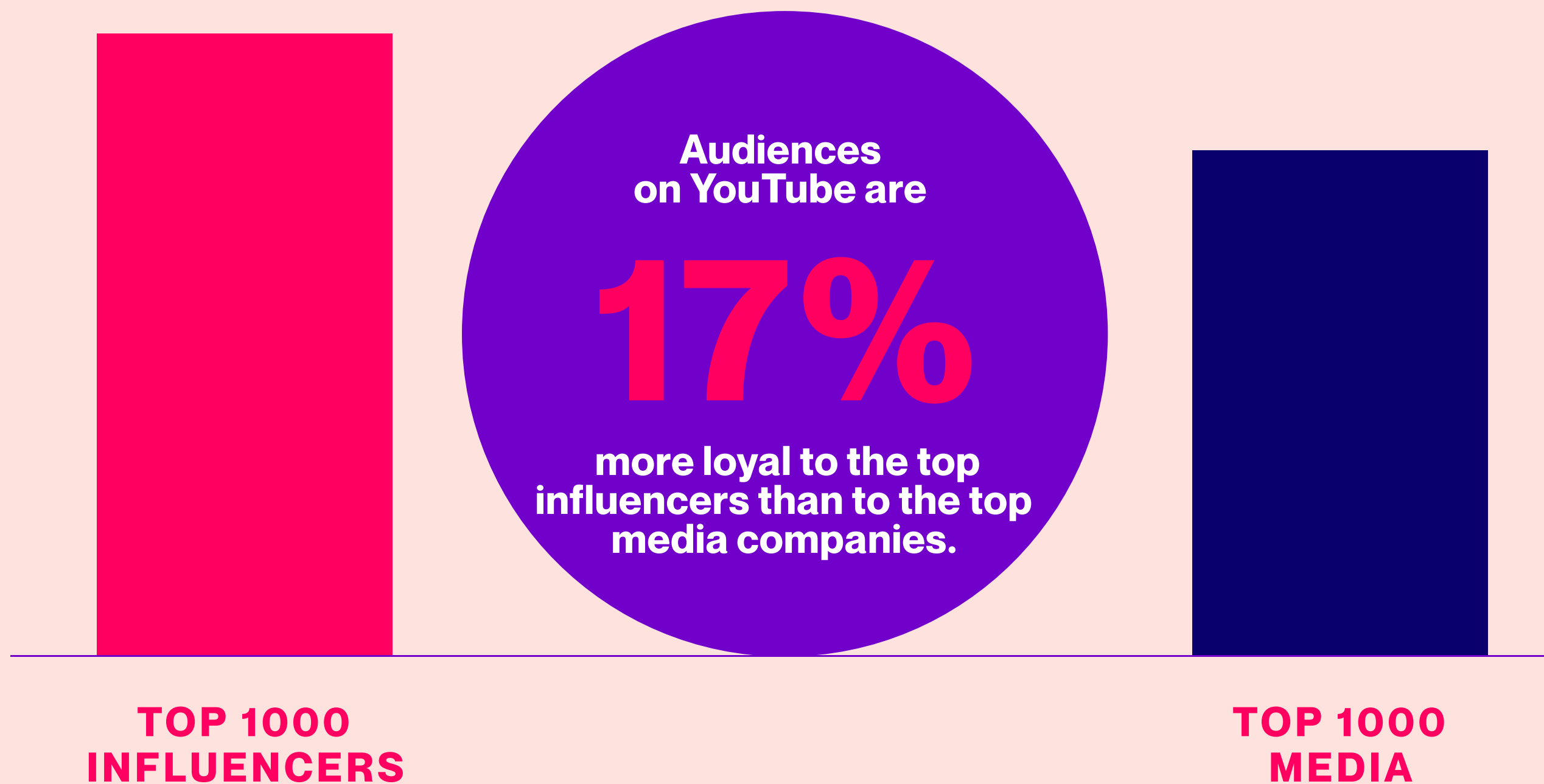
19.4M - V30 views
(Top SSSniperWolf video in the last 365 days by V30 views)

Source: Tubular Labs | Intelligence | YouTube | Analysis of top 25 videos by V30 views for each creator | Videos uploaded in last 365 days | Data as of May 6

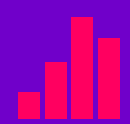
Influencers have on average more loyal audiences than media companies.

In this next section, we compare influencers and media companies and their average loyalty levels. In general, influencers tend to have a more loyal followership than media companies do.

LOYALTY FOR TOP 1000 US MEDIA COMPANIES AND INFLUENCERS ON YOUTUBE



Source: Tubular Labs | Special Analysis | YouTube | Top 1000 Influencers and media companies by unique viewers in February 2021 | US Audiences | Loyalty metric based on unique newer overlap in 2 consecutive months | US audiences | Feb 2021
Loyalty in Feb = Viewers watched a certain channel in January and February consecutively



Influencers on average are better at making their audiences tune in on a regular basis and creating a loyal following.

Looking at the top 1000 influencers and the top 1000 media channels, there's a significant difference between loyalty for the two creator types.

Influencers showed on average a loyalty value 17% higher than that of media companies.

This indicates that influencers on average are better at making their audiences tune in on a regular basis and creating a loyal following that they can monetize and engage with consistently.

It's evident that as individuals, influencers seem more personable than brands or companies, which makes it easier for them to build an emotional connection with their viewers.

What does this mean for you as a media company? Learn from the influencers! Be personable and strive to make a connection and build loyalty.

Loyalty can tell a different story than reach and watchtime.

Now let's look at loyalty on a creator level. We already saw that some of the best ways to build loyalty are dependable consistency and an emotional connection.

Unique viewers and watchtime are important metrics to understand reach and engagement. However, in the following example from top Sports media creators, we see dedication in viewers can't be judged on reach or watchtime alone.

#1

SPORTS MEDIA BY UNIQUE VIEWERS

IN FEB 2021



NFL

#1

SPORTS MEDIA BY WATCHTIME

IN FEB 2021



WWE

#1

SPORTS MEDIA BY LOYALTY*

IN FEB 2021



NBA

Source: Tubular Labs | Special Analysis | YouTube | US audiences | Loyalty metric based on unique viewer overlap in 2 consecutive months | *Includes creators with >5M unique viewers only | Feb 2021

Unique viewers and watchtime are important for media companies, and loyalty is another valuable way to understand your audiences.

This is because loyalty, while often tied to broad reach and viewer engagement, can sometimes go beyond these metrics. Let's use three top sports creators as an example.

In terms of unique reach, the NFL had the broadest US audience in February 2021. And viewers spent the most time with the WWE. However, if we're considering loyalty, the NBA had the highest audience retention from one month to the next.

As such, beyond optimizing for reach and watchtime, media companies should aim for a high month-over-month retention to build truly loyal fan bases.

Conclusion

As discussed earlier, media companies should strive for loyal viewers to reap the benefits of lower cost of retention, higher ad frequency for advertisers, fan advocacy, and an audience-informed content strategy.

Loyalty differs by content genre.

How loyal viewers are depends on the content; entertainment-style content attracts loyal followings but other genres lend themselves better to one-off viewing. But no matter your genre, you can start to build loyalty by:

- Creating dependable content where viewers know what to expect and get the same quality and content they like, which helps convince them to return to your channel.
- Developing an emotional, personal connection with your viewers that makes them want to come back for more.

Influencers are good at loyalty, but media companies can be, too.

Influencers are doing a better job at keeping their fans continuously watching their content. That being said, media companies can also experience high levels of loyalty, especially as they learn from the way these influencers are connecting with their dedicated followers.

Loyalty can tell a different story than reach or watchtime.

Loyalty complements reach and engagement, and can help you better understand how dedicated your audiences are to your content.

Want more insights?

Talk to us.

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