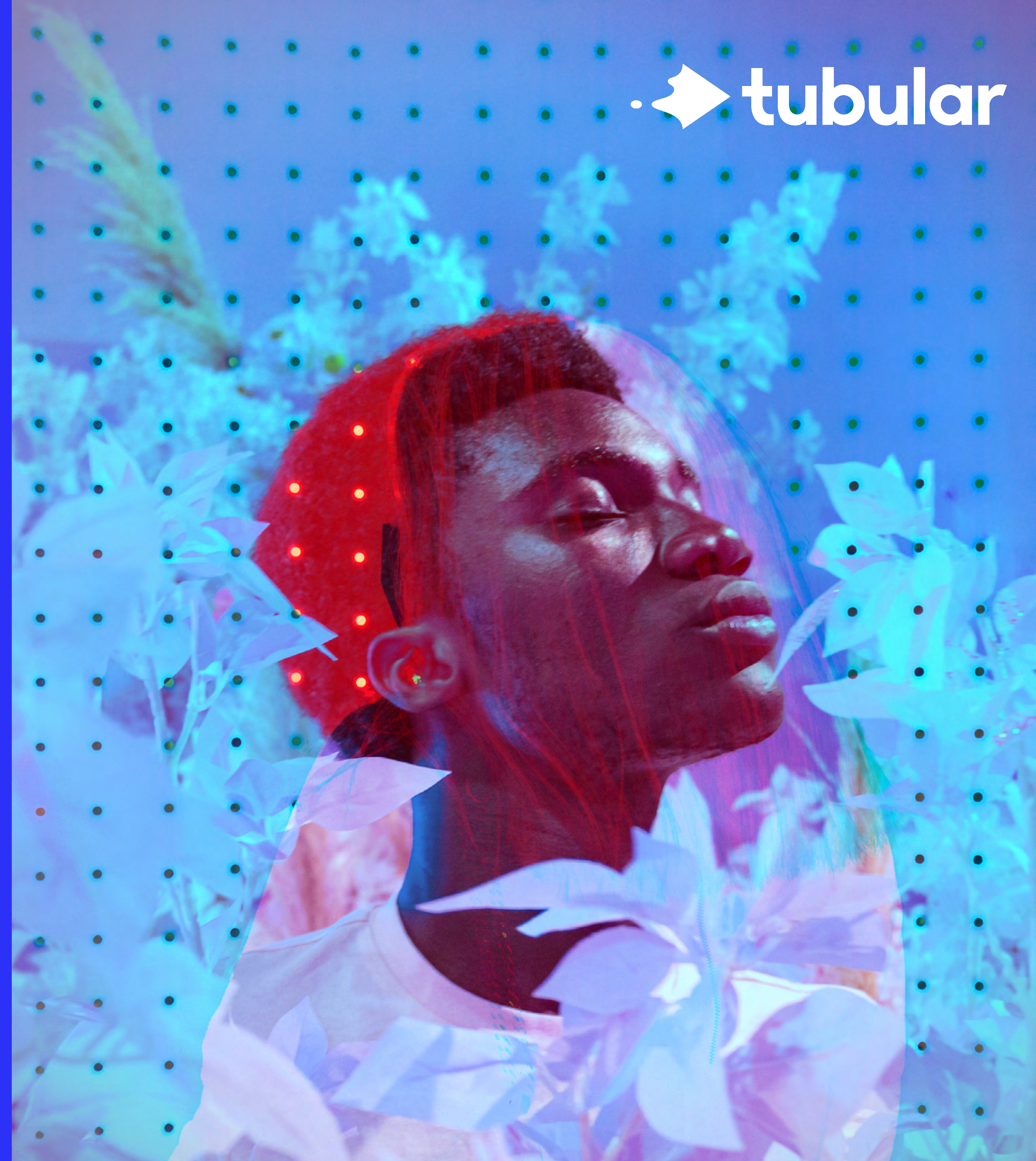


What Broadcasters Can Learn from Influencers and UGC

Social media influencers are the stars of Gen Z. If it's dancing on TikTok or gaming on YouTube that made them famous, they know how to achieve high growth, high loyalty, and high reach with these young audiences.

In this snapshot, we'll take a look at why broadcasters should care about and leverage social video influencers and user-generated content (UGC) by:

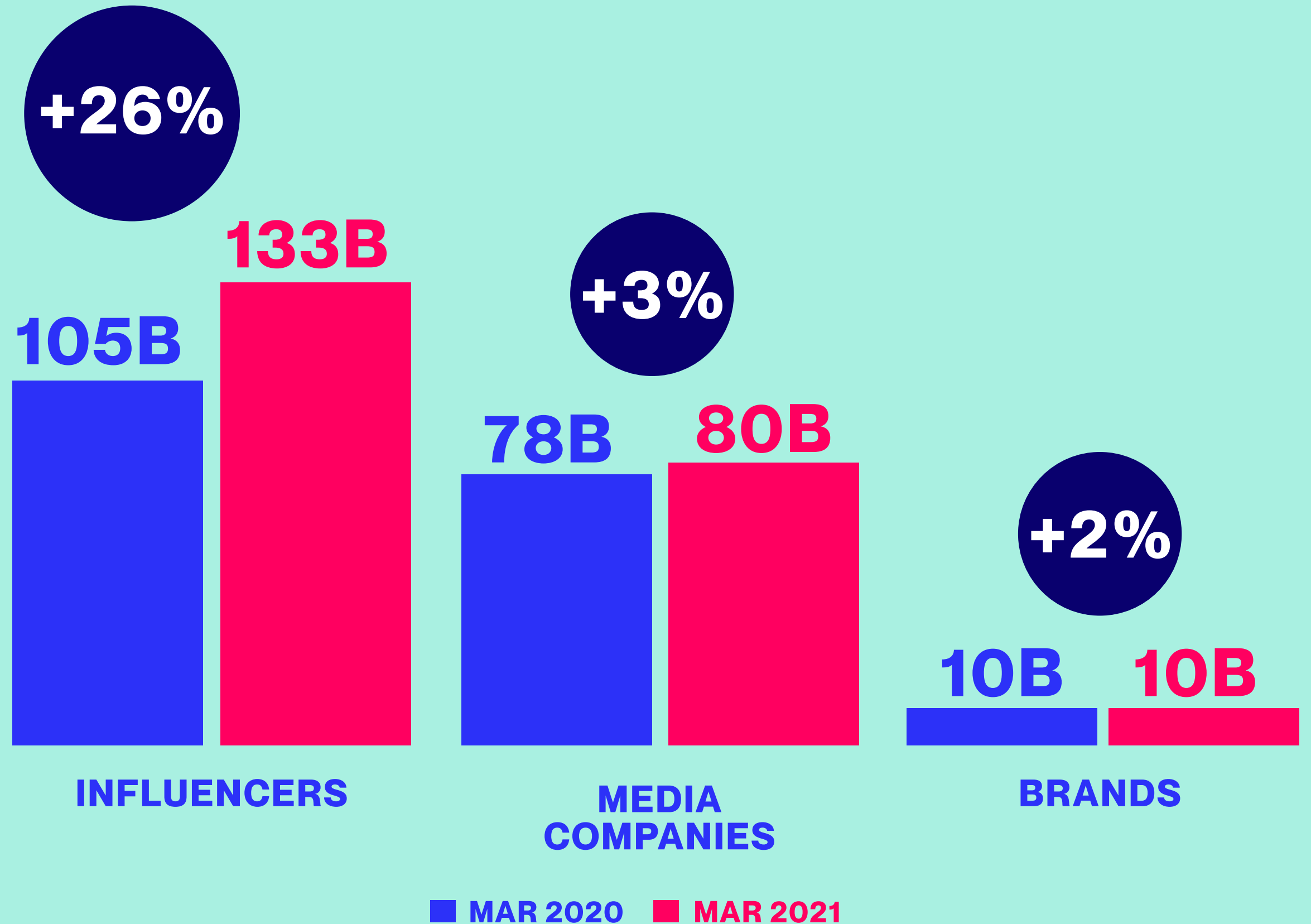
- Embracing earned content
- Producing content around influencers
- Learning from influencers



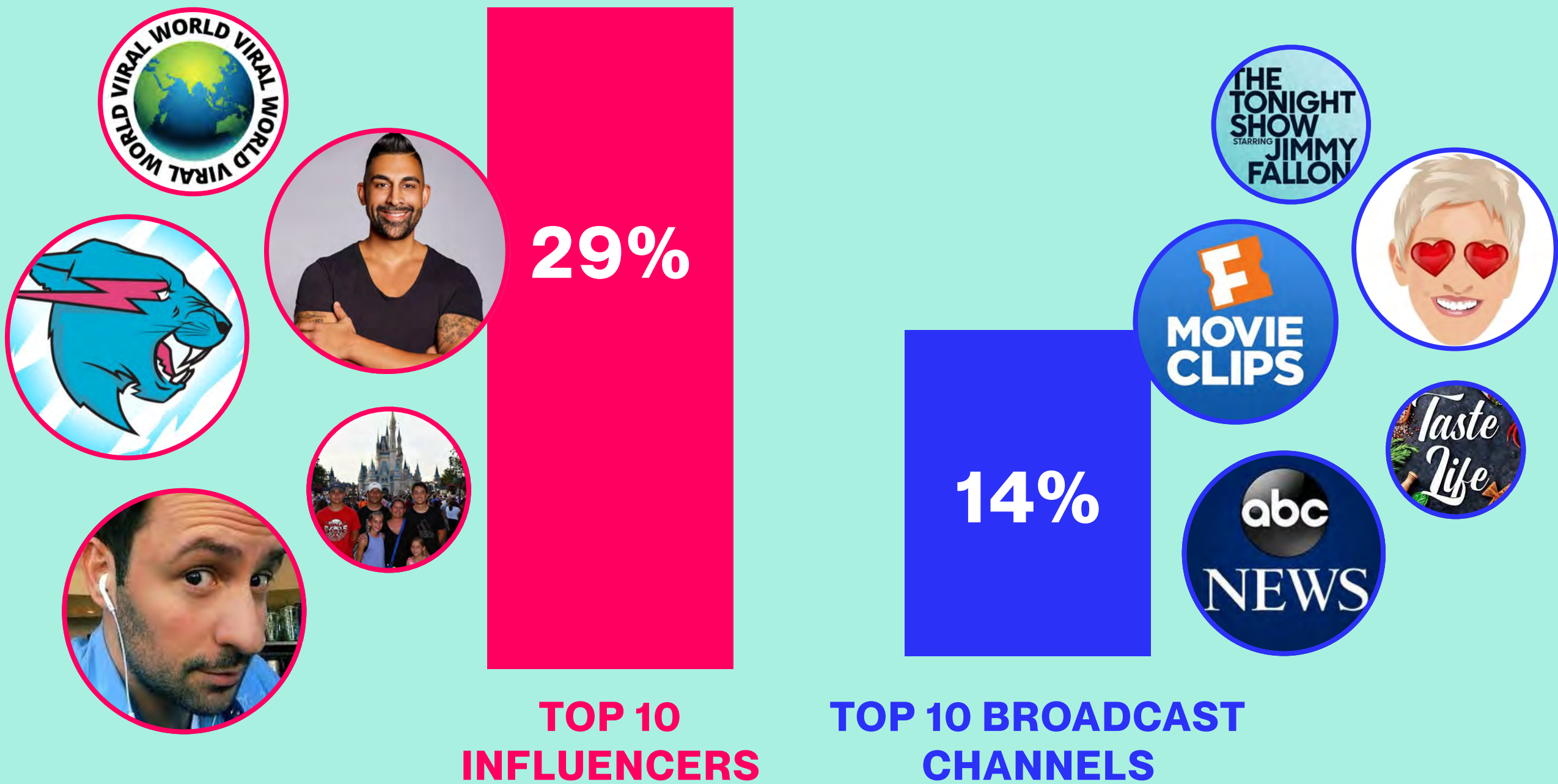
Influencer content is the main driver behind social video watchtime growth.

Influencers earned the most watchtime in March 2020 due to Covid-19 lockdowns: time spent with the top influencers on social video grew by 26% YoY.

US MINUTES WATCHED BY CREATOR TYPE BASED ON TOP 1000 CREATORS PER TYPE



US GEN Z (13-24) AVERAGE POPULATION REACH



Influencers are successfully speaking to the young audiences everyone wants to reach.

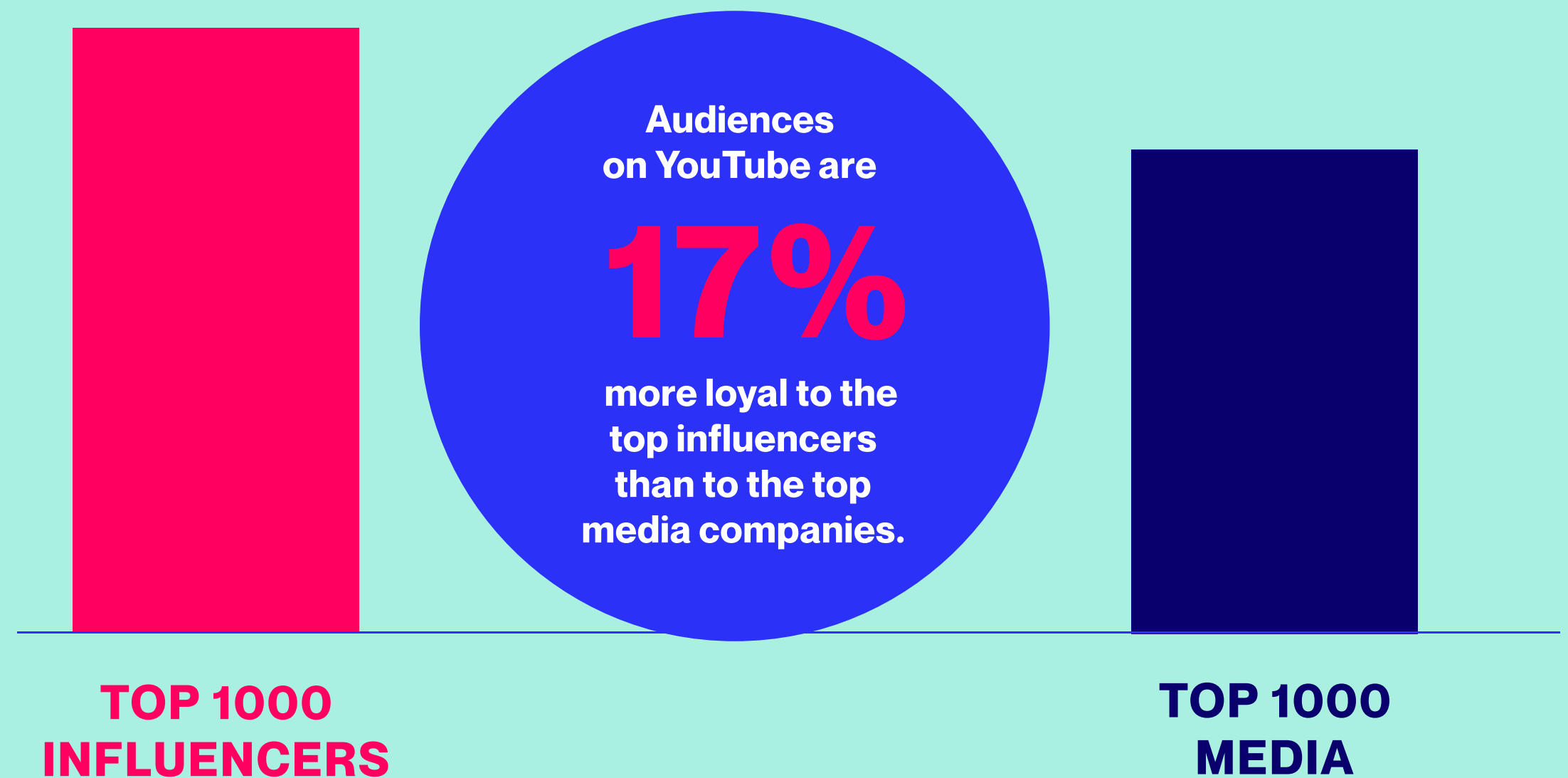
The top 10 influencers reached on average 29% of US Gen Z audiences last month, twice as much reach as traditional broadcast channels.

Source: Tubular Labs | Audience Ratings | Cross-Platform (YouTube+Facebook) | Top 10 Influencers and Broadcasters in March 2021 by Unique US Viewers. Influencers: Viral World, Viral Queens, TikTok Vibes, TikTok Yeb, MrBeast, Rick Lax, More of Dtay Known, Klem Family, Lil Durk, Dhar Mann. Top 10 Broadcasters: Movieclips, Inside Edition, Netflix, ABC News, Sesame Street, The Tonight Show Starring Jimmy Fallon, Ellen DeGeneres, Taste Life, Entertainment Tonight, The Late Late Show with James Corden | Population Reach of US 13-24

Audiences are more loyal to their favorite influencer channels than they are to the top media creators.

Influencers get their audiences to tune in on a regular basis and create a loyal following that they can monetize and who will advocate for them.

LOYALTY FOR TOP 1000 US MEDIA COMPANIES AND INFLUENCERS ON YOUTUBE IN FEB 2021

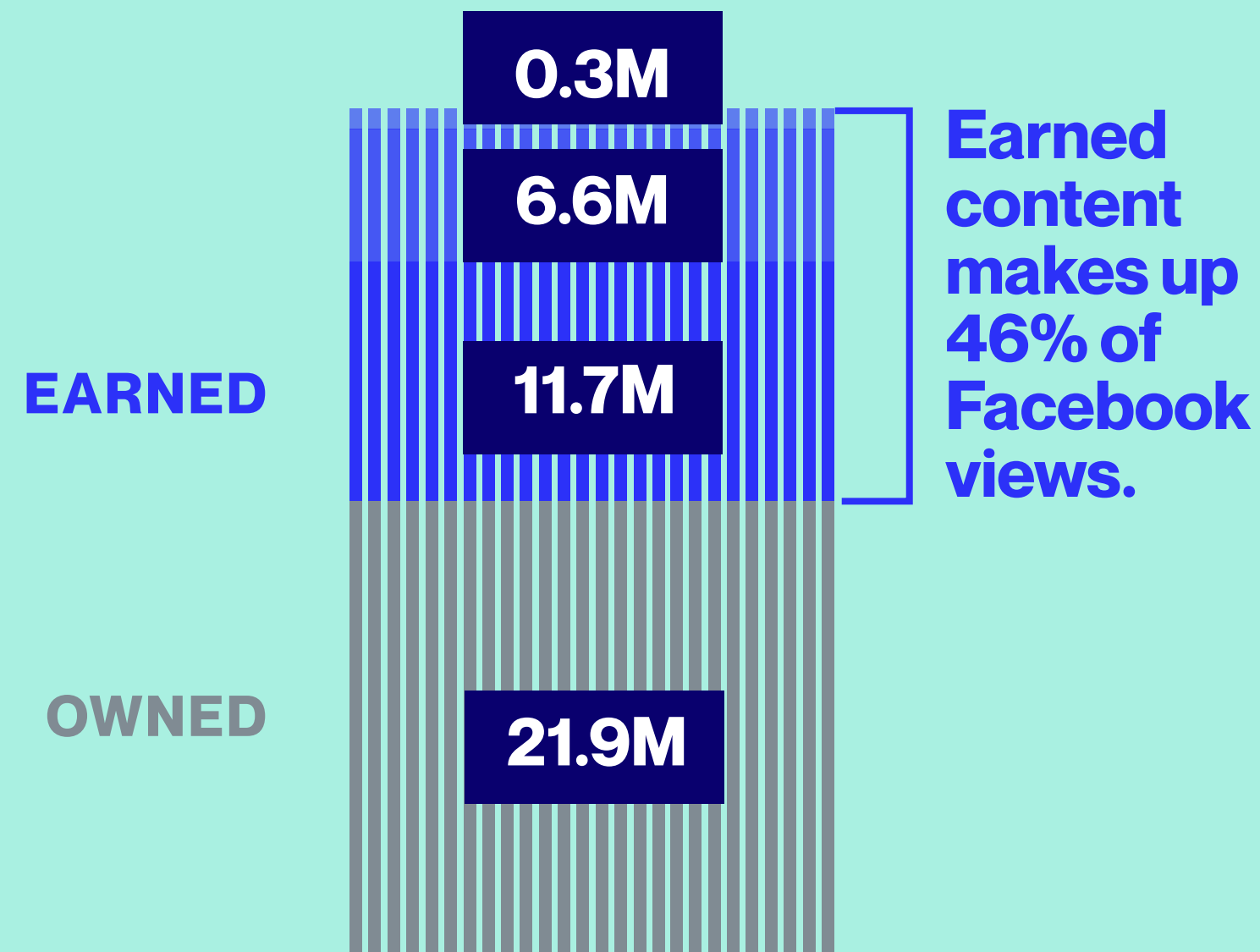


Source: Tubular Labs | Special Analysis | YouTube | Top 1000 Influencers and Media Companies by Unique Viewers in February 2021 | US Audiences | Loyalty Metric Based on Unique Viewer Overlap in 2 Consecutive Months | Feb 2021

Influencer-earned content can amplify the success of a hit episode or title.

For example, Netflix's *The Queen's Gambit* benefited from influencer-created content boosting the chess craze the show inspired.

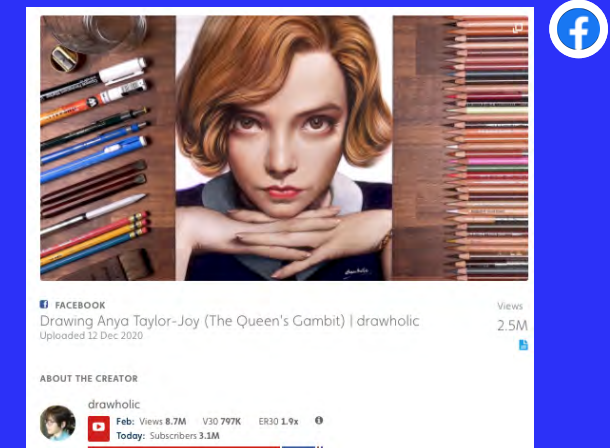
THE QUEEN'S GAMBIT (NETFLIX) OWNED + EARNED FACEBOOK VIEWS IN THE LAST 365 DAYS



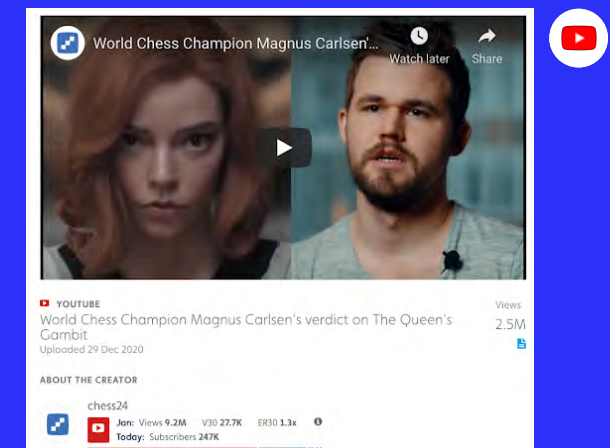
Owned Content
Influencer-Earned Content
Media-Earned Content
Brand-Earned Content

INFLUENCER-EARNED CONTENT

ARTIST DRAWING OF MAIN CHARACTER
2.5M V30 VIEWS ON FACEBOOK
1.6X ER30 ENGAGEMENT RATE



CHESS PLAYER COMMENTARY
2.2M V30 VIEWS ON YOUTUBE



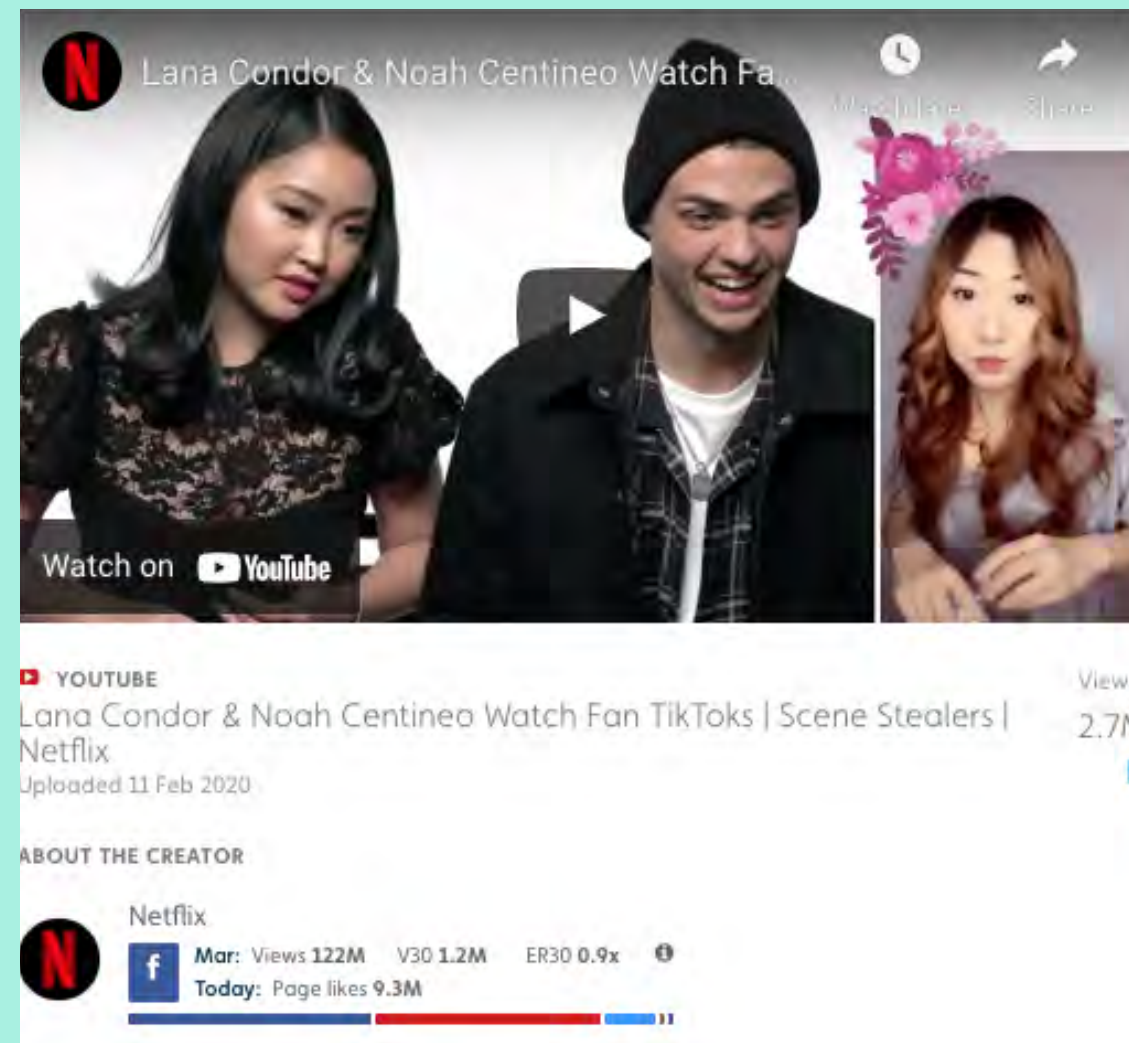
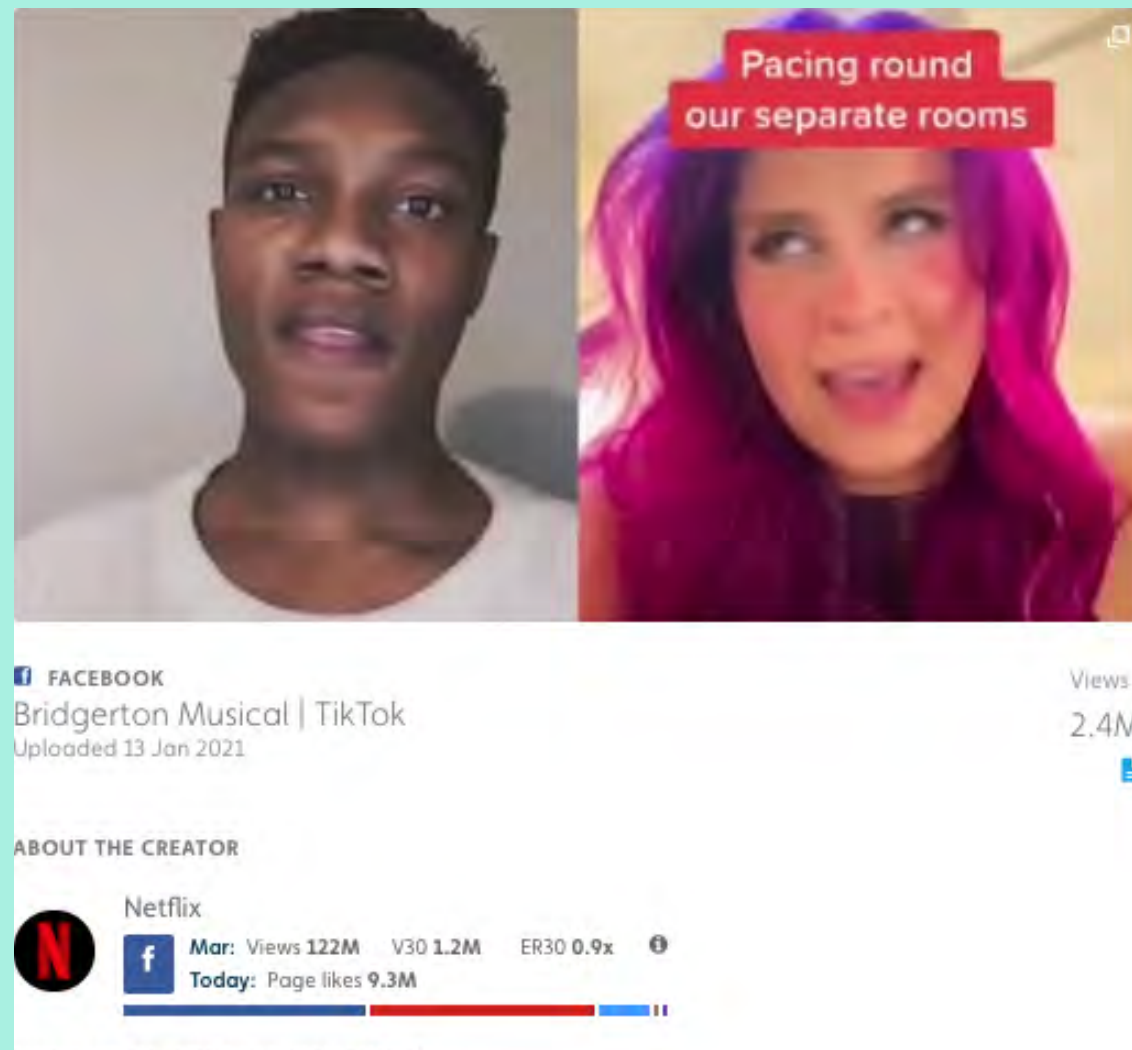
Netflix goes all-in on fan-generated content.

Netflix uploaded a musical version of the show *Bridgerton* fans had created on TikTok.

The video shared by Netflix received 2.3M V30 views on Facebook; that's 7x as much as the average US SVOD video on Facebook.

For the movie series *To All the Boys*, the cast watches and comments on TikTok videos where fans recreated scenes from the show.

This video received 1.3M V30 views on YouTube; that's almost 3x as much as the average US SVOD video on YouTube.



Embrace fan-generated content and make it part of your content strategy.

Acknowledging and promoting the content your fans made creates a sense of community and involvement viewers are searching for on social video (and may not find on TV).

Make content around famous influencers to attract young audiences.

Shows like *Ellen* and Jimmy Fallon's *Tonight Show* are actively using influencers to keep their content young and fresh.

The Tonight Show with Jimmy Fallon and Ellen leverage social video influencers for their content.

11.3M V7 Views

This video featuring TikTok star Charli D'Amelio is among the top 10 *Tonight Show* videos on YouTube in the last two years based on views within 7 days after upload.



8M V7 Views

This video featuring YouTuber Nikkie de Jager is among the top 20 *Ellen* videos on YouTube in the last two years based on views within 7 days after upload.



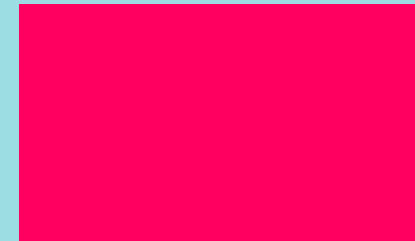
During Covid-19 lockdowns and in the absence of working studios, late night hosts **took a page from the influencers' handbook and filmed from their homes** or created content in a scrappier way than usual - and it paid off.



The first “Home Edition” of the *Tonight Show* is still in the top 25 videos for the show uploaded in the last two years based on views within 7 days after upload.

THE TONIGHT SHOW STARRING JIMMY FALLON V7 (AVG) VIEWS ON YOUTUBE

517K



PRE-PANDEMIC
(L365D ENDING
APRIL 5, 2020)

1.2M



“HOME EDITION”
DURING THE
PANDEMIC (MARCH
12 - APRIL 5, 2020)

The “Home Edition” series of *The Tonight Show Starring Jimmy Fallon* received even higher V7 (Avg) views in the couple of weeks after the lockdown started than the show did over the past year pre-pandemic.

Learn from influencers.

Sometimes authentic and resourceful resonates better with younger audiences than perfect and polished.

▶ **Influencers know how to attract growing, loyal Gen Z audiences.**

Viewers spend the most time on social video with influencers; they show the highest growth and easily reach young, loyal Gen Z audiences.

Therefore working with and learning from influencers is important for broadcasters trying to gain (and maintain) a more youthful demographic.

▶ **Embrace user-generated content and leverage influencers' popularity.**

Including fan-generated content about your shows in your content strategy creates a sense of community and involvement younger generations are searching for on social video (and don't usually find on TV).

Additionally, influencers are the new stars of the internet — making them part of your content can help reach the younger audiences you're targeting.

▶ **Take a cue from influencers.**

More often than not, authentic and resourceful beats perfect and polished, at least to Gen Z audiences.

Act more like influencers and show you care about authenticity and the viewers' real-life experiences.

**Ready to influence Gen Z?
Talk to us.**

vision@tubularlabs.com