

The video marketer's guide to creator-driven audiences

Framing channels,
content and audience
behaviors in 2022



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[Why consumers see creator-driven platforms as TV](#)

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With [94% of linear TV advertising reaching only half of linear audiences](#) at the start of 2022, TV is no longer the sure bet it once was. There are no guarantees for audience retention in the quickly changing world of streaming and AVOD. Even with titles and series generating hype, content production costs are going up and subscriber churn is persisting.

To overcome these challenges, advertisers strive to make their ad dollars work smarter in places where their audiences are loyal, and content can be crafted for relevance and personalized experiences — this increasingly means creator-driven platforms.

These environments offer more specialized and personally-relevant content than network- or studio-produced content. They are made by individual creators or smaller teams of creators who can engage directly with their viewers and develop content that their audience specifically asks for, resulting in highly-personalized moments to which audiences are especially tuned.

“Viewers are naturally more engaged when they’re watching content they love, so ads benefit from increased recall and impact,” said JonPaul Rexing, director of video, Google Services Sector. “And, only with digital can you personalize your strategy to meet viewers in their moments of intent.”

This new report from Digiday and Google unpacks the shifting consumer consumption behaviors across video-based platforms — with a specific lens on YouTube’s expansive audience of 2.6 billion monthly users. According to Statista, those users account for [over one billion hours of video](#) watched daily.

This report will dive deeper into how the platform stacks up in the eyes of consumers and compare how it ranks to other social media platforms, such as TikTok, as well as streaming TV platforms, as YouTube sits in the middle of the two spaces. With expert insights — and survey data from 2,400 U.S. respondents between ages 18 and 64 — the following sections help unpack how these views affect the ways marketers approach video advertising. And, more importantly, what marketing teams are doing to dovetail with how audiences watch and engage across creator-driven spaces.



What are creator-driven platforms?

Creator-driven platforms are essentially apps with a focus on social media and video-based experiences that are largely dependent on the content generated by content creators, such as influencers, bloggers, videographers, etc. The software within these platforms is usually built so these creators can grow their content and channels through monetization (most often via ads and subscriptions). While these platforms don't solely consist of creator content, it's a significant driver of the traffic and engagement on the platform and a powerful draw for advertisers, thanks to the engagement such creators continue to provide these platforms.

How audiences see creator-driven platforms: better or equal to TV

Advertisers want to align ads with popular content. But what is deemed "hit-worthy content" to an audience?

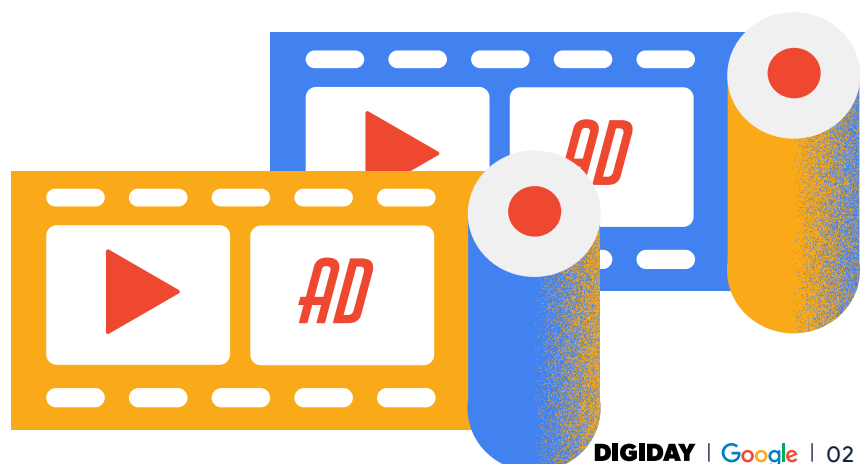
In general, the answer is new and fresh material that features innovation, cultural relevancy and personalization. Sometimes these pieces go viral; other times, they trend, but these are the types of content next to which advertisers typically want to appear.

Traditional studios have long production cycles and less flexibility to adjust their creatives. Content needs to be planned and shot well in advance, so making significant changes or moving stories forward based on audience feedback isn't possible until a mid-season break.

In contrast, modern creators have faster production cycles with immediate feedback on each video, allowing them to experiment and improve their next piece of content in days rather than months.

In response, creator-driven platforms have become a resource advertisers have leveraged to produce highly relevant content — creative that audiences can recognize as authentic and not driven by broad, impersonal marketing approaches.

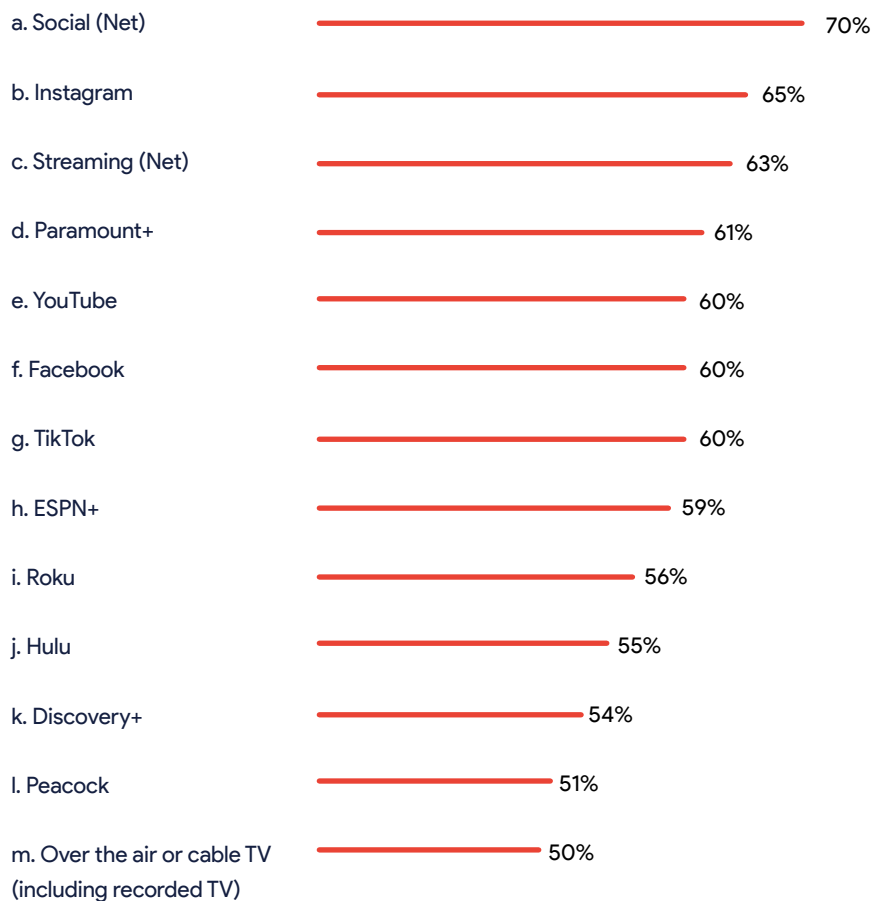
"Historically, studios and production companies decided what content to create, which means they acted as gatekeepers of what content was available to viewers," said REXING. "But, technological advancements unleashed creativity and led to the establishment of an incredible array of modern creators and media publishers. This means now, viewers can choose from a wealth of content — across many different screens and platforms — and they get to decide what's considered good."



How audiences see creator-driven platforms: better or equal to TV

The value of creator-driven content can be seen through new data on those creator-led channels. For example, according to a survey conducted by Ipsos in partnership with Google, 60% of U.S. respondents between 18 and 25 (Gen Z) — representing 250 out of the 2,400 total respondents — said that YouTube ads feel more personalized than ads they see on other platforms, giving the channel a significant lead over cable TV at 50%.

How much do you agree or disagree with the following statements about advertising on the following platforms? “Ads feel more personalized than ads I see on other platforms.” Select one for each.



When comparing social platforms to several streaming platforms, social media tops the list, with 70% of respondents saying the ads on social platforms (net) felt more personalized than ads on streaming platforms.

According to the Ipsos survey, 72% of respondents who watch YouTube on CTV devices agree that YouTube is the same thing as TV to them. Seventy-seven percent of consumers between 18 and 25 (Gen Z) say the same.

How audiences see creator-driven platforms: better or equal to TV

With what the data shows — that platforms like YouTube are considered the same as TV, if not better, by most respondents in the survey — it's not surprising that advertisers are shifting their approach to campaigns across the channels in play. Given a choice between traditional production companies and creator-led platforms, creator-led is what a large portion of the respondents prefer.

According to the Ipsos survey, 72% of U.S. respondents watch YouTube on their TV, with 51% watching it on their TV once a week or more and 26% watching it daily.

As so many consumers are watching YouTube on their TV daily, it challenges what types of content consumers are more inclined to watch. If they watch a platform with so much creator-driven content so often, does this mean they're consuming less traditionally produced content?

With such a change in how content is produced, consumers have more options from which to choose. The majority of consumers surveyed have indicated that creator-led platforms such as YouTube are where they can find the best range of content for their needs — 80% of U.S. consumers who watch YouTube on their CTV agree that YouTube has the widest array of content on their TV.

One significant change that can account for some of this shift is how audiences spend their time.

"Where we spend our time today versus even three years ago has changed," Rexing said. "The rise of streaming removes traditional content barriers and empowers consumers to choose how and when they want to watch. So, the reality is that when people watch content they love on TV, they're watching TV — no matter how it may be categorized. And, they see YouTube as TV, they see it as premium and a complete entertainment experience."

The role of optimization

As the ways people watch video shift, the challenge for marketers revolves around pivoting to meet those behaviors without a linear or traditional frame of mind.

A robust video marketing strategy requires a shift toward optimization-centric approaches. Marketers must consider who their video audience is, the formats they engage with and if they match the critical KPIs expected of the creative or campaign.

It's crucial, then, to build both experimentation and iteration into the creative process early on.

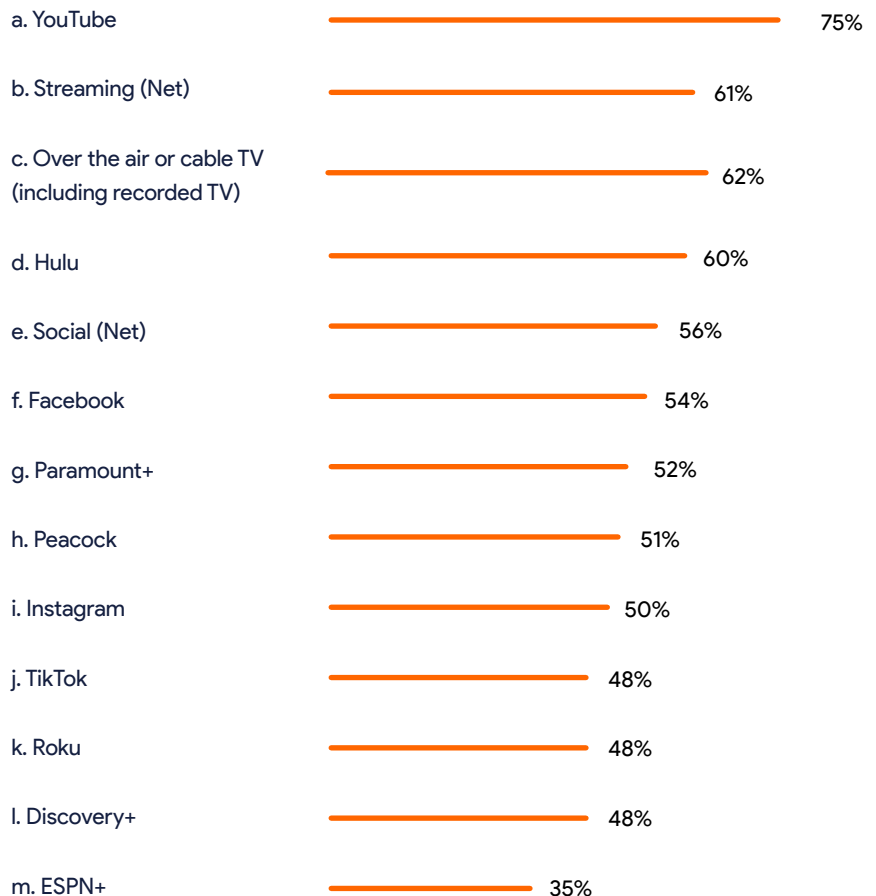
Mood and intent: Audiences say creator-driven video platforms are better for personalized content

When it comes to finding personally relevant content, most respondents said creator-driven video platforms are the best place for them to find content for all of their moods.

With that, 75% of U.S. respondents agree that YouTube has content for all their moods, which is higher than any other platform tested (TV was 62%, social was 56%, and streaming was 61%).

“Viewers have unprecedented control over their options and build personal content experiences,” Rexing said. “YouTube is the place where they have the most access to diverse, fresh and relevant content so they can find and watch what they need at any given moment.”

How much do you agree with the following statements about these platforms. Select one for each. “It has content for all my moods.”



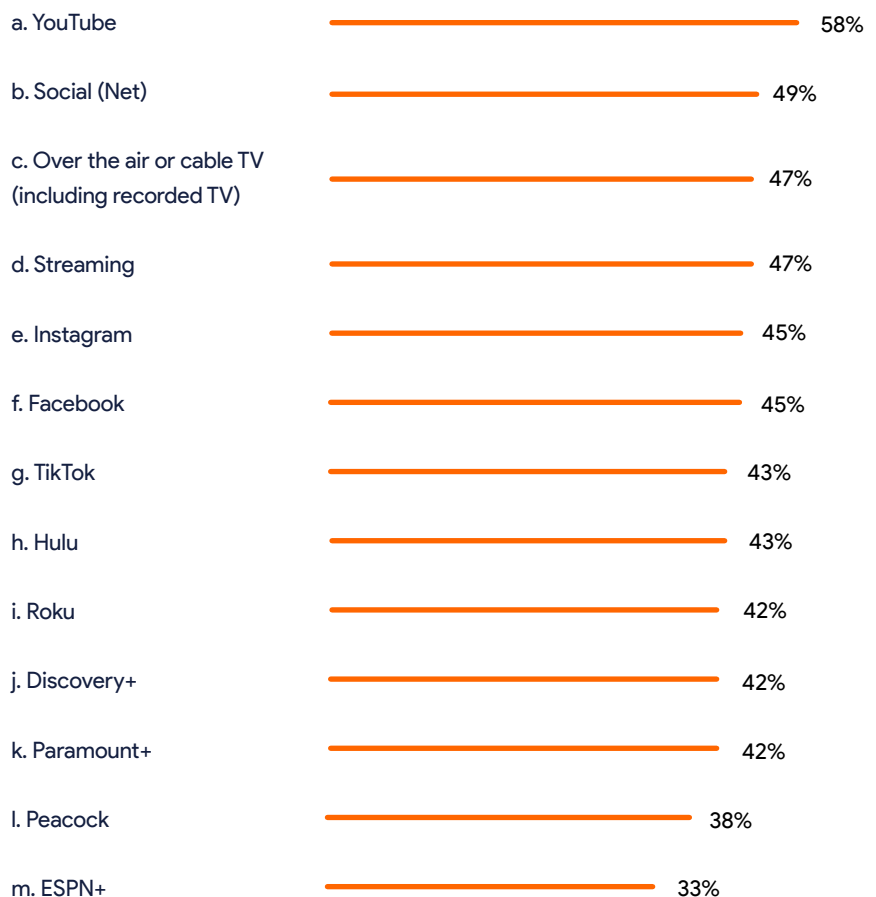
While reach is compatible, creator-driven platforms drive results for brands

Advertising on creator-driven video platforms has demonstrated significant boosts to conversion rate improvement.

In our focus audience, consideration to purchase intent conversion is greater for YouTube than for the control. For mobile, YouTube saw 62% versus 54% for the control; for PC, YouTube saw 67%, and the control saw 55%.

For example, according to the Ipsos survey, 58% of respondents agree that YouTube — the survey's focus — sparks in-the-moment inspiration to shop for something new versus an average of 44% for other social platforms.

How much do you agree with the following statement about these platforms? “It sparks in-the-moment inspiration to shop for something new.” Select one for each.



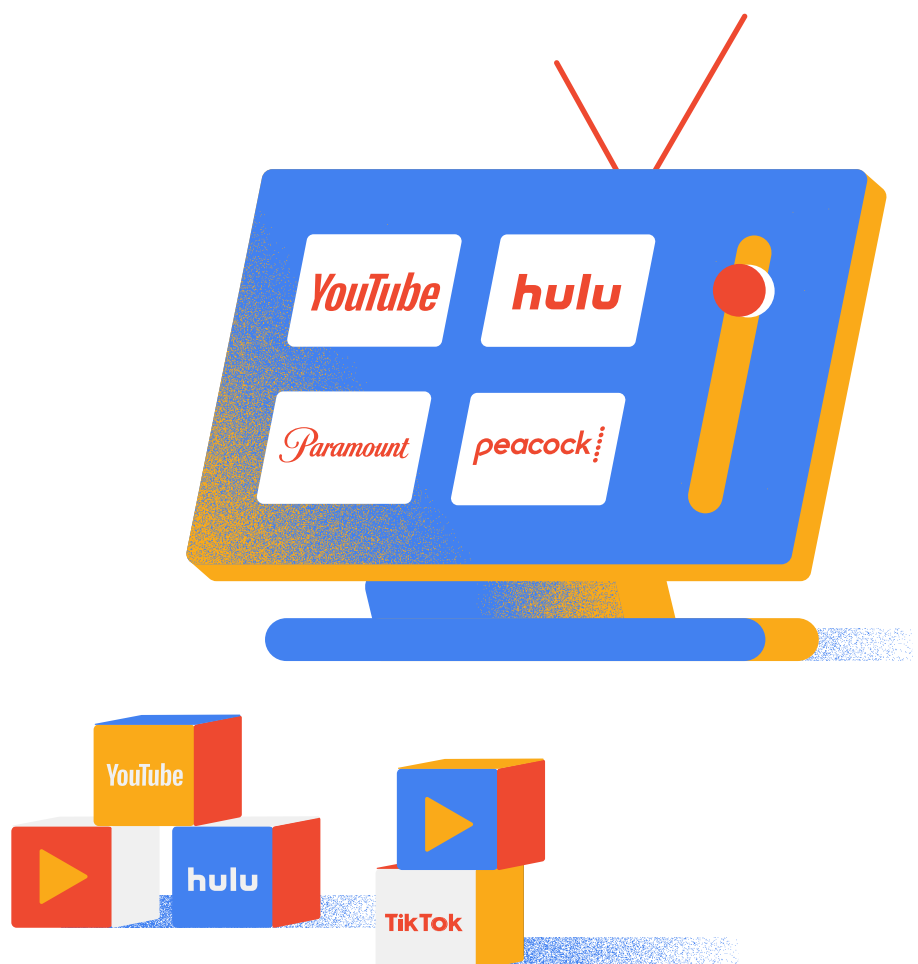
While reach is compatible, creator-driven platforms drive results for brands

While YouTube commands a majority, responses for cable TV, social media and most streaming TV platforms are about even — between 42% and 47% except for Peacock and ESPN+, which are at 38% and 33%, respectively.

“The magic of creator-driven platforms, specifically YouTube, is that it reaches viewers beyond just buying behaviors,” Rexing said. “It reaches who viewers are as humans — building deep connections to their passions — and it hits the soul. It is what makes YouTube a powerful place for building consideration and conversion. Reach is a math equation, you can get it in many places, but you get more effectiveness on YouTube.”

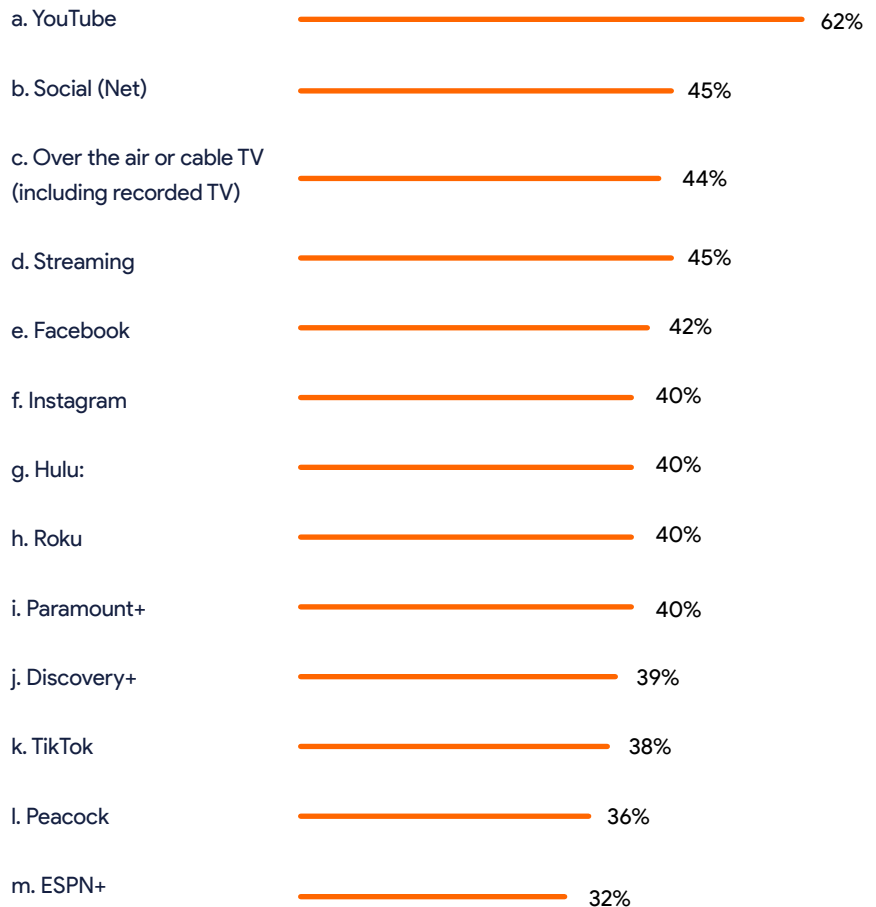
Creative-driven platforms inspire consumers to shop in the moment and help them feel more confident in what they are purchasing. Marketers can use this to their advantage by ensuring their ads show up at the right moment while their consumers are researching their products.

Additionally, 62% of U.S. respondents said YouTube helps them feel more confident in what they buy, versus 45% for other social platforms.



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How much do you agree with the following statement about these platforms? "It helps me feel more confident in what I buy." Select one for each.

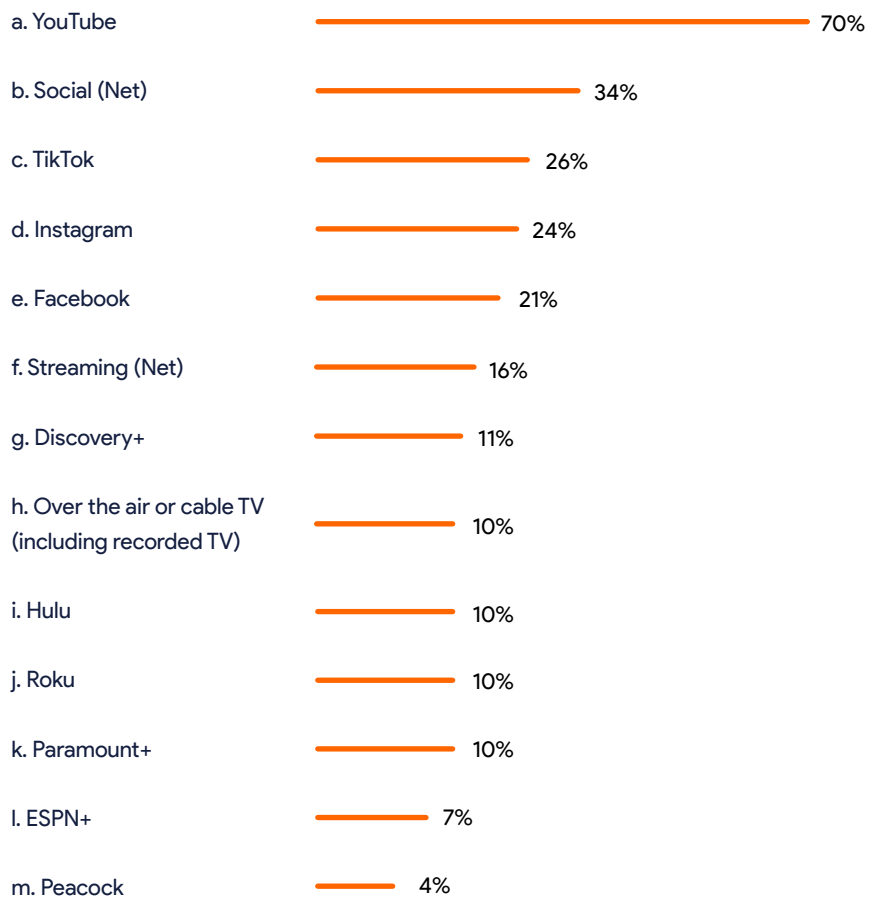


**While reach is compatible,
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Moving further down the funnel, creator-driven platforms not only help consumers find in-the-moment inspiration to shop and feel more confident in their purchases, but they're also able to find product demos on these platforms that help them decide what products or services they're going to buy.

Seventy percent of U.S. respondents who use YouTube turn to YouTube to watch a product demo versus an average of 24% for other social platforms among users. Overall, cable and streaming TV are very low — between 4% and 11% — as the nature of these platforms doesn't easily allow for creator content, which tends to be where consumers can find in-depth product demonstrations.

**Which of the following would you use if you wanted to watch a product demo?
Select all platforms that apply.**



Additionally, 50% of U.S. respondents who use YouTube turn to the platform to help them decide what product or service to purchase versus an average of 28% for other social platforms among users.

Toolkits for video marketers

When utilizing any creator-driven platform, leveraging the available tools is always a good idea for marketers who want to ensure they're making the most out of the platform. With this in mind, some free tools are usually available depending on the platform that can get teams started.

"YouTube Analytics is a free tool marketers can use to gain insight into who's engaging with you, what they're saying and what they're most interested in," said Rexing. "Simple reporting can show you which of your videos have been viewed, commented on or shared the most. It can also show you the demographics of audiences engaging with your channel and content. Or, an audience retention report to see where people are dropping off."



For Gen Z, creator-driven video is proving better for the next generation

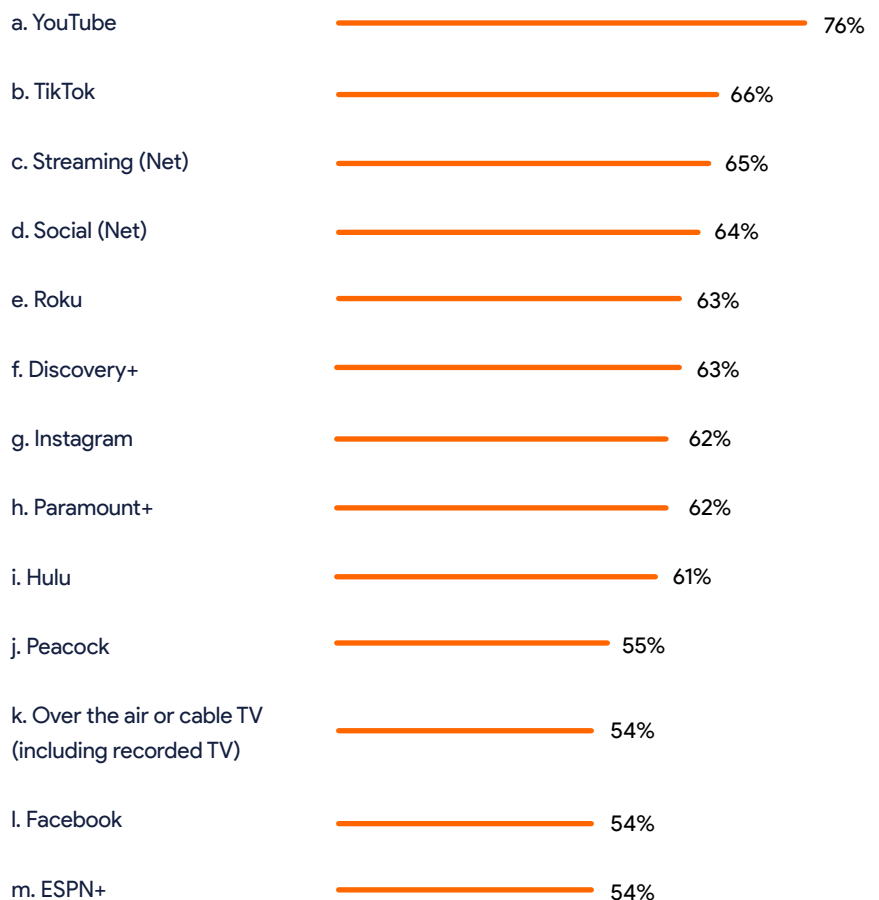
Gen Z and millennials tend to have more positive perceptions of YouTube than older generations, and showing up authentically is of the utmost importance. For Gen Z consumers, creator-driven video platforms are overwhelmingly more appealing than other platforms regarding familiarity, daily use, favorability and more.

“Gen Z, more than other generations, can sniff out authenticity from a mile away,” said Rexing. “The recommendations of trusted creators are important to, and influence Gen Z, which means marketers should explore integrations and branded content to round out their presence on these platforms to better appeal to Gen Z.”

In addition to valuing authenticity, 83% of Gen Z respondents who use YouTube agree that the platform makes them happy compared to 71% for social (net).

Creator-driven platforms represent a significant aspect of Gen Z's lives, with over three-quarters (76%) of Gen Z respondents (18–25) who use YouTube agreeing that the platform is important to their lives versus an average of 64% for other social platforms.

How much do you agree with the following statement about these platforms? “It is important to my life.” Select one for each.



For Gen Z, creator-driven video is proving better for the next generation

Identifying the right video platform on which to advertise

While other social platforms have a strong presence here — between 54% and 66% — cable TV is undoubtedly lower at 54%. However, while some streaming services are still ranked relatively high, Peacock and ESPN+ are trailing behind, with the lowest percentages at 55% and 54%, respectively.

Even with many of these platforms and channels clustered relatively close to each other, YouTube is farther above them all at 76%, proving to be the most important platform for Gen Z consumers.

A key for marketers wanting to make the most of their advertising on creator-driven platforms is first to identify where their audience is. Operative questions include: who are they trying to reach, and where do they spend their time? These are essential questions to answer when looking for the right video platform, as each campaign may require a different platform depending on those responses.

Additionally, it's crucial to identify where those audiences can be found and whether focusing on one video platform versus several will limit the team's opportunity or ability to reach its audience as effectively as possible.

Rexing expanded on this even further with recommendations regarding creative. "Ask questions such as: How does the message/creative resonate with the audience? Does my message and process match best practices for results on the platform?"

The popularity of creator-driven platforms is not likely to dwindle anytime soon, as evidenced by the Ipsos research. Successful marketing teams know three key drivers to success: working to engage with these platforms, understanding how frequently consumers engage with them, and creating video campaigns that dovetail with the many reasons audiences are flocking to creator-driven experiences. In doing so, they stand to create effective ad campaigns that set themselves up for success now and in the future.



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