VIACOMCBS EyeQ

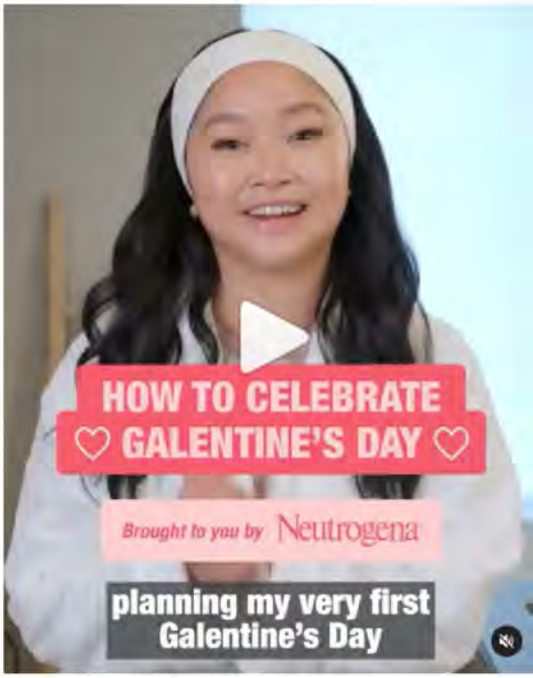
CULTURE OF *influence*

volume 2

FLUID INFLUENCE

Influence is no longer confined to one corner of the internet. We explore the all-consuming impact of online creators and their communities on culture, brands and beyond.

The confluence of smartphones, social media platforms and e-commerce has given rise to an industry that draws in approximately 50 million people worldwide[1] who call themselves online creators today. On the frontlines of the creator economy are the YouTubers, TikTokers, Twitch and Discord gamers, Instagram models, Substack writers, Patreon podcasters, Reddit communities, Clubhouse hosts, OnlyFans thots, Pinterest pinners and creators who are redefining social entrepreneurship as the blueprint for the future.



*Lana Condor on #GalentinesDay, AwesomenessTV

*Licensed therapists on TikTok

The language, behaviors and expressions of creators have permeated society, from licensed therapists breaking down trauma on TikTok to government PSAs taking a leaf from the social media playbook. Influence is no longer the sole province of any one type of person, platform, location, social status or genre. Influence is vast and fragmented, dotting the online landscapes of art, design, writing, music, photography and entertainment.Influence is fickle, flitting from "problematic shit your favorite celebrities have done"[2] in "Your Fave Is Problematic" to "comics against cancel culture" being deemed the "New American Celebrity."[3] The more people spread and exchange ideas in the digital realm, the more influence behaves like tiny vibrating atoms, ricocheting against the shifting plates of culture.

*US FDA's warning against dewormer drug to fight COVID goes viral

[1] SignalFire
[2] Tumblr
[3] The New York Times

As global ad spend on the influencer marketing industry reaches $15 billion by 2022[4], understanding how the creator economy has fundamentally shifted consumer culture and expectations is foundational for brands and marketers looking to engage creators.

$15B

Projected global ad spending on influencer marketing by 2022

> *Like art, creator culture is in the eye of the beholder. So if you come at it through marketing and advertising you see it commercially. If you come at it from Hollywood, you only see it in terms of content. And if you are coming at it from Silicon Valley, you only see it through use of platforms. But all of that is limited."*
>
> - David Craig, author, *"Creator Culture"*

[4] *Insider Intelligence by Mediakix*

THE SHIFTING WORLD OF INFLUENCE

This report looks at four critical shifts in the world of online influence, and what these changes mean for creators, audiences, and brands.

All data featured in the *Culture of Influence* report is from ViacomCBS's proprietary study unless otherwise reported.

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VIACOMCBS EyeQ INFLUENCE

Leveraging the power of influence.

Chapter 1:

FROM CREATOR TO CORPORATION

From Creative Side Hustles To The Institutionalization of Influence

A creator? In this economy? Online creators are quickly becoming the new business moguls, turning their side hustle into a main gig with radiating benefits. The path to creator-dom was always more democratized than traditional celebrity, but new monetization models and VC-funded apparatuses have leveled the playing field for anyone interested in converting their clout into a credible career path. From signing with top talent agencies and securing lucrative endorsement deals with brands to investing in start-ups and starting their own product lines, the next generation of creators is ready to disrupt the labor market in their own right.

> *"This is more than just kids making videos on the internet. This is the New American Dream."*
> - Kaelyn Kastle, pop artist featured in *Who Gets To Be an Influencer?*

THE GROWING DESIRE TO BE A CREATOR

2020 became a watershed year for creatorship when the coronavirus pandemic drove life online, and people of all ages and backgrounds flooded the creator space as they made career pivots, tried out new platforms or simply looked for connections. **13% of Gen Z and Millennials already consider themselves influencers.** How will the economy morph when that number blooms to 25%?

29%
of American kids want to grow up to be a YouTube star

11%
want to be an astronaut[5]

49%
of Gen Z and Millennial audiences said they would like to press a button to instantly morph into a full-time creator.

Being an online creator is increasingly seen as a common career choice and a reliable way for college-age students to earn a living as they flock to campus ambassador programs run by Bumble and TikTok as well as certification programs like Mavrck's Influence University to master the craft of content creation and building online communities.

[5] *SignalFire*

THAT DESIRE IS FUELED BY ENTREPRENEURIAL OWNERSHIP AND DESIRE FOR IMPACT

> *I don't want to have fame just to have it, but I recognize the business aspect of it. Once you have fame, a lot of doors open up."*
>
> Instagram and TikTok Creator, Female, 25

Being a creator is the new American Dream, steeped in entrepreneurial roots and the desire to make an impact on people's lives and society. **27% of Gen Z and Millennial consumers associate the word "influencer" with someone who is impacting culture in significant ways.** When 23 years old is the average ideal age for Gen Z consumers to achieve financial independence,[6] gaining clout is seen more as a means to get freedom that comes with being your own boss.

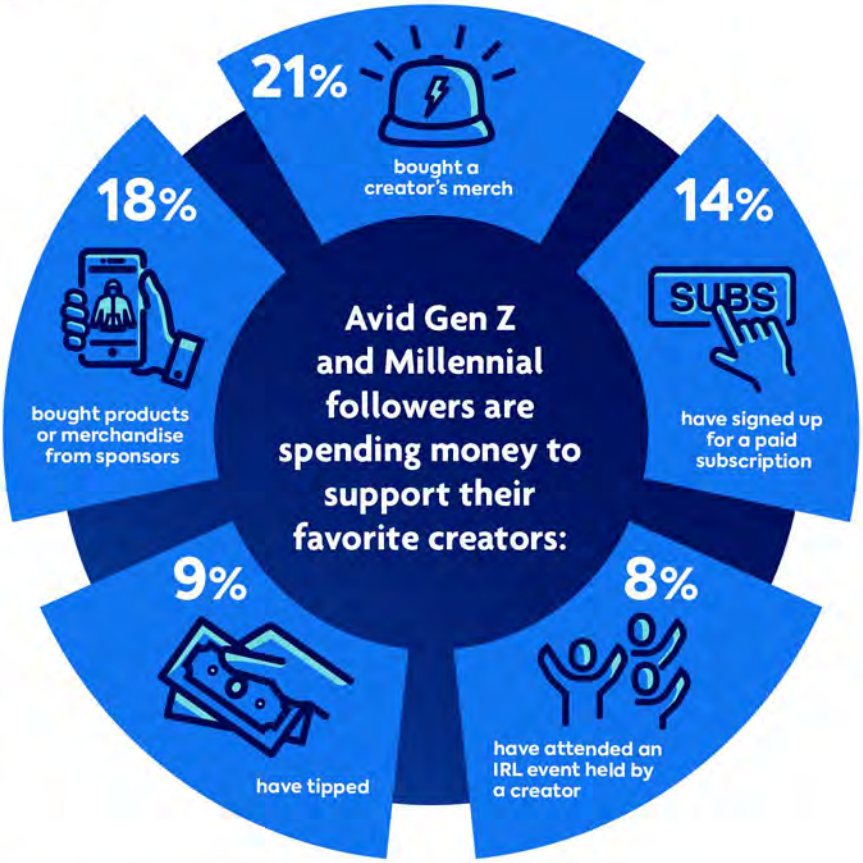
Gen Z and Millennial consumers would be an influencer for financial indepence and impact.

[6] YPulse

ALTERNATIVE REVENUE MODELS FOR CREATORS EXTEND BEYOND TIPS AND PREMIUM CONTENT

** the fantasy vs. the reality of being an influencer*

For the vast majority of creators who haven't "made it," working as a creator means there are no days off. With the rise of mutual aid and a deeper recognition of digital labor, the industry is professionalizing itself to favor creators—especially those who remain unsupported by formal labor markets to reward their talents and passions with stable incomes.



Direct payments have become a viable income stream for creators. Even online tipping, a casual fringe activity where influencers would plug their Venmo or Ko-Fi handles in their profiles for direct cash deposits, has turned into virtual tip jars galore, tingling with Bits, Stars, Super Stickers, disco balls and confetti thanks to new tipping features developed by major platforms from Twitch to Clubhouse. Adult content creators on OnlyFans reminded the content subscription service who runs the show when it tried to ban sexually explicit content from its platform—citing pressure from its banking partners—only to reverse course following widespread backlash from both the creators and the paying "fans."

> *"The goal for the business is to be able to make a consistent monthly income that supports the lifestyle and the freedom that I want to have."*
>
> – TikTok Creator, Female, 42

CREATORS GET THE VC TREATMENT

If ever there was a sign that the creator economy is here to stay, multi-million dollar seed rounds are it. Among creators' latest subscribers are venture capitalists and investors, who are circling the space to build profitable solutions that allow creators to monetize their influence. Fifty creator-focused start-ups this year have seen investments to the tune of $2 billion,[7] and countless new market players have entered the scene.

Where Keeper Tax as a software provider may help creators identify tax write-offs, Stir acts as a financial studio for managing their money and metrics. Pietra equips creators with the tools to launch their own product lines in less than 90 days. Platforms and "market networks" offering fan-driven monetization, such as CreatorStack and LitPic, do for creators what Shopify did for e-commerce entrepreneurs. PearPop monetizes social interactions by letting fans bid for shared screen time with their favorite TikTok stars, while Mark Cuban's new audio venture Fireside is built for creators to monetize live conversations with fans.

*Li Jin, the investor guru for online creators

> "*Venture capital is now pouring into the once underfunded worlds of content creation and curation. We will see new economies spring up and existing ones accelerate. Stand clear, content creators and curators just joined the party.*"
> – Grant McCracken, Anthropologist & Author

Creators themselves are branching off into other industries beyond the entertainment space, leveraging their status to turn into startup investors, philanthropists and even space travellers. Those who have cracked the code of going from bloggers to business owners are sharing the bag. Creative Juice, a new investment fund backed by creator-turned-venture-capitalist MrBeast, allows people to invest in creators and gives them a suite of tools to act more like small businesses. And while companies tend to seek out partnerships with Gen Z creators, two viral TikTokers Josh Richards and Griffin Johnson started HawkeZ to attract brands like Crocs interested in reaching audiences their own age.

*Creative Juice by YouTuber MrBeast

*HawkeZ by Josh Richards and Griffin Johnson

[7] The Information's Creator Economy Database

CREATORS ARE IN A NEW PHASE OF INSTITUTION-BUILDING

As the industry steadily grows and matures, creators are banding together for equity and resources—either turning to traditional institutions or creating their own to legitimize and substantiate their influence. The D'Amelio family provides one model: they rode their TikTok stardom to Hollywood, soon signing with talent agency UTA and starring in their own reality TV show for Hulu. Their newfound power gives rise to brand partnerships where the influencer is the main draw instead of a shiny accessory—Charli D'Amelio's collaboration with Dunkin' turned from specialty drinks into a full collection of merch. YouTuber turned prize fighter Jake Paul – whose knockout wins are inspired by the over-the-top theatrics of pro wrestling – continues to expand his audience and turn his cachet into a content empire, even signing with Showtime as his pay-per-view distributor to further legitimize his content creator efforts.

*Charli D'Amelio launches merch with Dunkin'

*Jake Paul vs. Tyron Woodley on Showtime

> *"All of this has prepared me to come into the fight game and be the best content creator, be the best at doing media, at ruffling feathers, at posting on social media. It's something you don't see a lot of fighters do or know how to do."*
> – Jake Paul, Professional Boxer & Content Creator

Creator Houses serve as incubators for new influencers-as-brands, supporting rising talent with resources, relationships, infrastructure and distribution. Initiatives like The Creator Union, Freelance Solidary Project and the inclusion of influencers in SAG-AFTRA are helping content creators tackle fragmented revenue streams, negotiate fees, offer contracts, reap health benefits, get paid on time and avoid exploitative practices.

*"Influencer Agreement 101", SAG-AFTRA

*Chiara Ferragni launches her own IPO

With this newfound institutionalization comes a changing professional reality: creators can build out their own business viability as brand deals become secondary revenue streams. In a first for the creator business model, Chiara Ferragni—Italian clothing-to-lifestyle influencer with 21 million Instagram followers and major collaborations with Dior and Lancôme under her belt—will be launching her own IPO to monetize the persona she built over a decade.

As creators step into the land of corporate power and celebrity, their fans are along for the ride. Instead of seeing institutionalized creators as sellouts, they're excited to see their stars rise.

45%

of Gen Z and Millennial consumers have never felt an influencer got too big or too famous for them.

ARCHETYPES

This set of emerging archetypes represent creators opening their expertise to help followers build their own enterprises.

THE
MOGUL

inspires their followers to make smart business and financial decisions

THE
MOGUL

CREATOR
MIKE NOVOGRATZ

The former hedge fund manager helps new investors understand the world of cryptocurrency and NFTs.

The Gen Z self-taught options trader shares his learnings on basic trading strategies and top stocks to watch.

THE
MOGUL

CREATOR
ROB SHIELDS

THE
COACH

offers tips and tricks on ways to excel in one's career

THE
COACH

CREATOR
JACKIE CUEVAS

The former recruiter and nonprofit HR worker gives young viewers advice on how to approach their careers.

If the landscape is professionalizing itself to favor online creators as an economic force to reckon with,

brand partnerships across categories need to be creator-forward. ViacomCBS partnered with McDonald's in a star-studded campaign, featuring over ten influencers such as Sterling Shepard and Lexi Hensler, to build hype around its limited-edition Travis Scott meal—modeled after Travis Scott's order "since back in Houston" as a nod to his roots.

VIACOMCBS EyeQ INFLUENCE CASE STUDY

**Sterling Shepard promotes McDonald's Travis Scott meal*

- Working with an online creator can take on any number of forms, from one-off collaborations to long-term partnerships. Consider the influencer's audience, aspirations and goals to make each collaboration the most effective.
- Remember that creators are their own brands. Think about creator partnerships as collaborations rather than an amplification of your brand's message.
- Borrowing from stock market logic, consider investing in early-stage creators and working with partners who have invested in early-stage creators to incubate, develop and grow their talent.

Chapter 2:

FROM CURATED TO ALL ACCESS

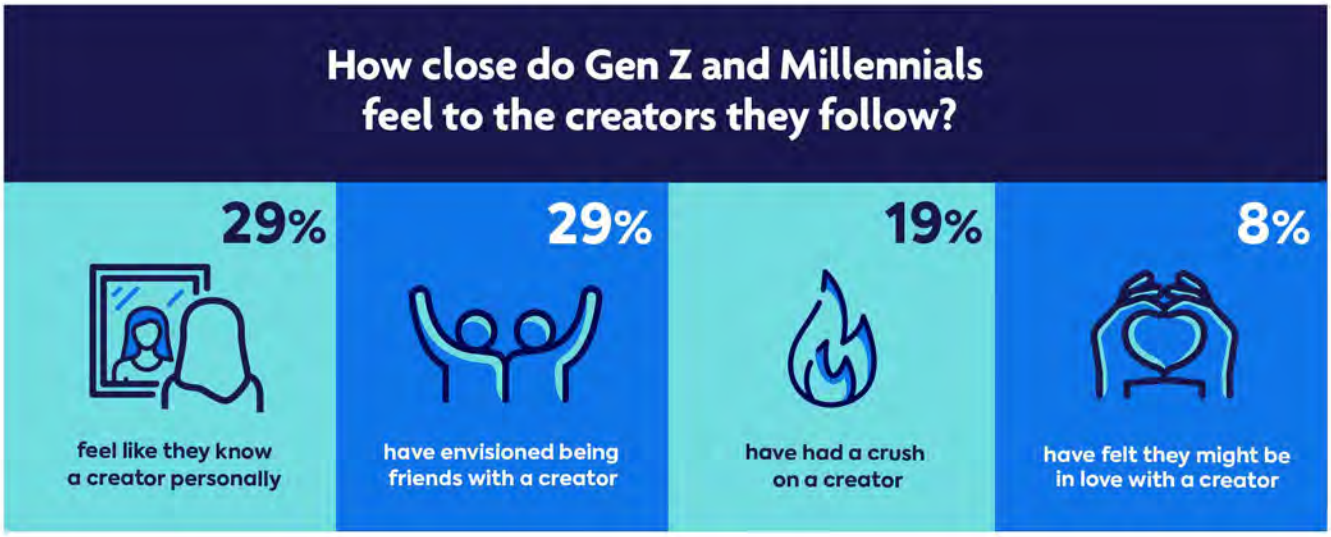
From Aspirational Aesthetics to Always-on Access as the Norm

Once upon a time, social media was the land of purely aspirational imagery, where influencers codified a new aesthetic vocabulary and inspired their followers to adopt their lifestyles. They broadcasted their dreamy vacations, parenting tips, picture-perfect homes, wardrobes and skincare routines to anyone who followed their feeds. Today, however, intimacy is the expectation. The raw, interactive nature of social media has further pushed the creator-consumer dynamic towards bottom-up fandom. Thanks to real-time mechanisms for commentary and feedback, fans expect greater proximity, seeking constant connections to their favorite creators, who, in turn, have to be ready to bare it all and lift the veil of perfection. For mega-stars, adapting to this shift requires establishing more intimacy and vulnerability, whereas smaller creators may exert more community control. As more creators put their everyday lives on display, no matter how personal or mundane, consumers feel less alone in their own lived experiences. Redefining this vulnerability as a strength has evolved the purpose of using social media beyond connection and entertainment, to a culture of open sharing.

> *Think of creators less as a writer or producer and more like a community organizer. Relational management is key to the success and sustainability of every creator I've ever encountered."*
>
> - David Craig, co-author, "Creator Culture"

PARASOCIAL INTIMACY CONNECTS FANS TO CREATORS

Have you ever felt like a podcaster, YouTuber or TikToker was your friend? Sociologists coined the term "parasocial relationship" in the 1950s to describe the illusion of friendship between the performer and spectator. Modern-day parasocial relationships transcend boundaries and give rise to surprising behaviors, like TikTokers calling their followers "besties," or followers intently observing creators' lives.

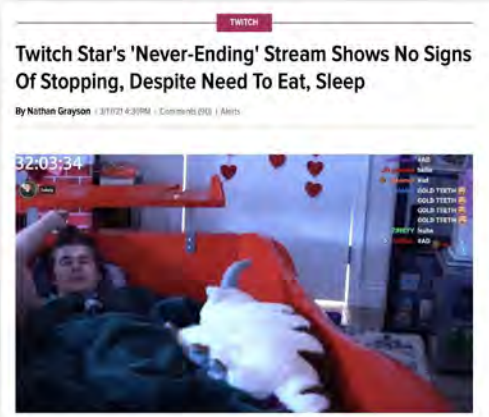


*#BookTok Creators on TikTok

Bookish teen influencers on TikTok embody the power of an intimate parasocial relationship: #BookTok creators share authentic emotional responses with their fans by crying about their favorite books on camera, ultimately helping big publishers like Barnes & Noble sell tens of thousands of copies a month. They recommend books with emotionally fraught endings to followers who buy them in droves, leading retailers to take notice and turn tear-inducing titles trending on the platform into revenue-generating bestsellers.

ONE CREATOR'S MUNDANE CONTENT IS ANOTHER FAN'S TREASURE

The impact of social content goes both ways, helping fans connect more deeply with the creators they watch, who have gone from breaking the fourth wall to beguiling fans into their private lives and even their bedrooms. Those looking for a virtual slumber party might turn to Twitch streams by Ludwig Ahren, a creator with 2.8M followers who streamed nonstop for 26 days, while fans commented in real time.



*Twitch Streamer Ludwig Ahren

*#cleaning content on TikTok

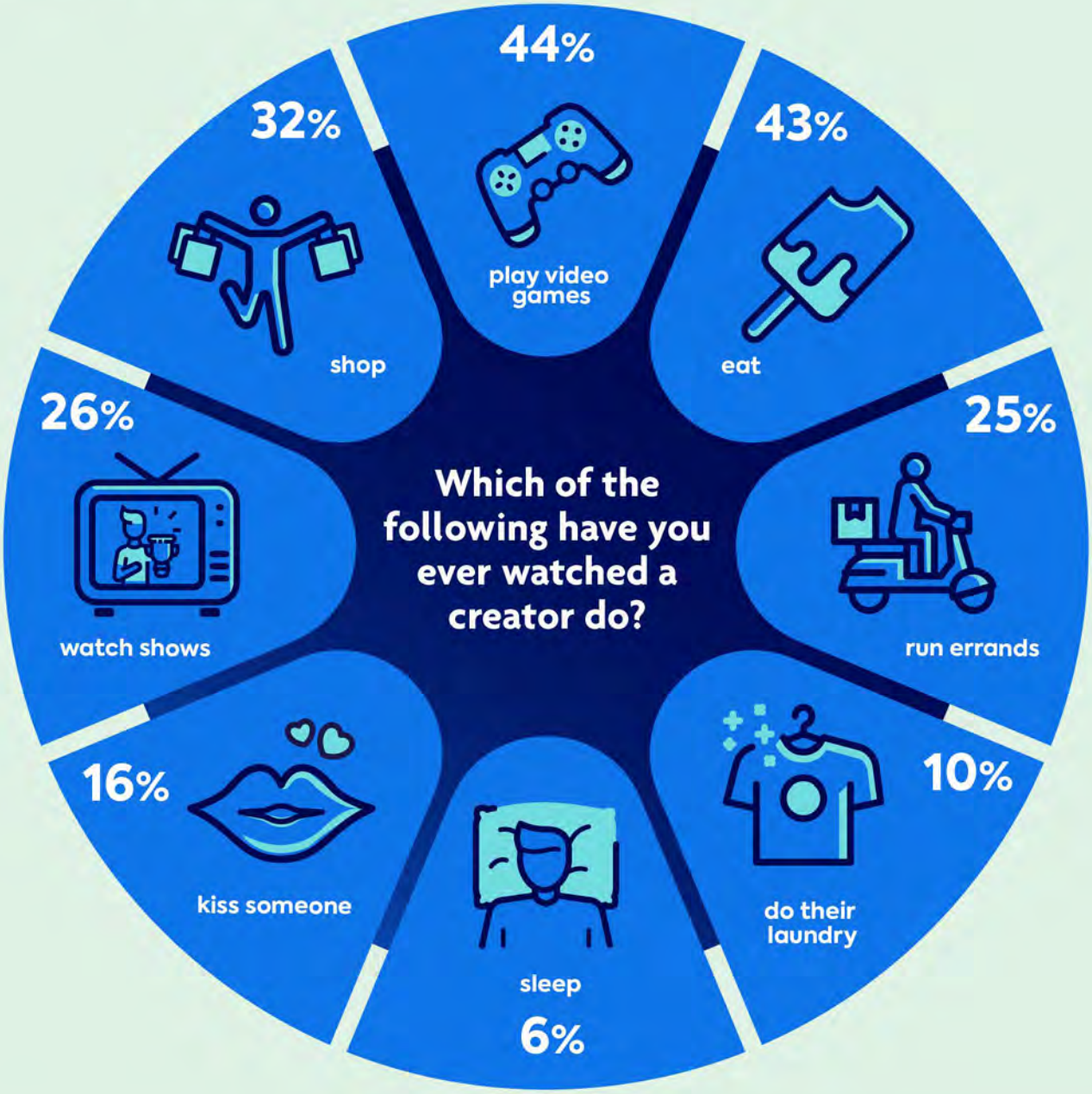
*Mukbang star Bethany Gaskin

On YouTube, viewers can catch Bethany Gaskin, a mukbang multimillionaire who boasts Cardi B amongst her subscribers, slurp and chew on crab legs every week. Even deep-cleaning is entertainment. On TikTok, videos tagged #cleaning have over 7.6 billion views,[8] featuring grotesque but satisfying "CleanTok" content like laundry stripping and plughole cleaning. Gaming influencers enjoy a captive audience on Twitch, where viewers watch them play in real-time for hours on end. In 2020, Twitch audiences watched over 1 trillion minutes of video content, almost double the amount of time spent in 2019.[9]

1 TRILLION+

minutes of video content Twitch audiences watched in 2020[9]

[8] New York Times
[9] Statista



> *I think people like the opportunity to just zone out and watch something really normal - something very mediocre, very day-to-day. A little bit of an out of body experience for them because they can kind of hop into my life for a few seconds before kind of going back to whatever they're doing."*
>
> - Instagram and TikTok creator, Female, 25

> *Maybe they find you because you play a game they like — but they'll watch you even if you're playing a game they hate."*
>
> - Nick Vercillo,The Yard co-host, *Digiday* (2021)

TRANSPARENT JOURNEYS HELP CONSUMERS FEEL MORE CONNECTED

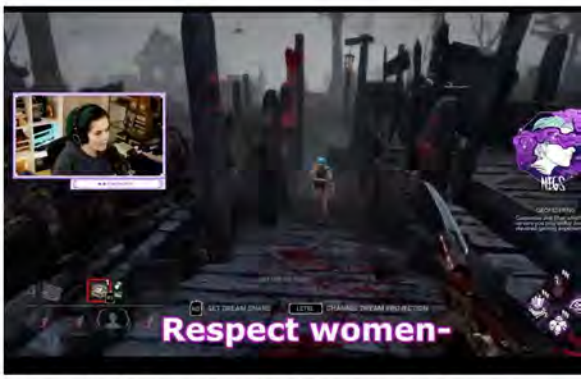
Without a dedicated PR team to control their image, creators are typically given free rein over sharing their daily experiences online. "Relationship-based creators" such as Emma Chamberlain draw audiences based on their relatable, unfiltered personas. 49% of Gen Z would rather spend the afternoon with their favorite online celeb than their favorite Hollywood celeb.[10]

> *They (creators) inspire me to better myself, mental health and self image-wise. They make you feel like you aren't alone with certain things going on in life. They helped me survive the COVID pandemic without going crazy."*
> - Female, 34 / PA

From curvy models posting realistic clothing hauls on TikTok to female gamers addressing sexism in the video game industry, creators are helping create a transparent culture that deals with issues head on. With this transparency sometimes comes failure or discomfort—**27% of Gen Z and Millennials have watched a creator get embarrassed**, which can make their own experiences of embarrassment less fraught.

**New York-based curvy model Remi Bader*

> *They (creators) have helped me, without knowing, from committing suicide. Their content reminded me that there is still hope to live for each day."*
> - Female, 20 / TN



**Full-time Twitch streamer @negaoryx fights misogyny while gaming*

[10] *YPulse*

Beauty blogger Em Ford—best known for her "You Look Disgusting" video about unrealistic beauty standards—posted her first video in over a year, where she opened up about her break from YouTube and her abusive relationship, and encouraged her followers with similar personal experiences to share their own stories and seek help.

*"You Look Disgusting", Em Ford

*Justin Baldoni's Man Enough podcast

* Dr. Chazz helps parents break generational cycles

Jane the Virgin star Justin Baldoni expanded his book and web series *Man Enough* to a podcast where he hosts honest, often thorny conversations unpacking pop culture's portrayal of men and unlearning his own notions of masculinity.

As intimate, candid discussions about personal struggles and mental health become more mainstream, online creators have helped lead the way, debunking social norms and expanding their audience's definitions of a life lived with honesty and care.

29%

of Gen Z and Millennials feel that online creators have had a large impact on their lives.

> *I share my challenges or traumas that I've been through. I think it unlocks a sense of relatability — that anything is possible for them as well. Some will say they haven't quite gotten to that point yet and I think it unlocks compassion and awareness.*
>
> – TikTok Creator, Female, 42

ALL-ACCESS CULTURE = ALWAYS-ON EXPECTATIONS

The creator economy has built out new channels of online entertainment that take reality TV to its next logical step—raw, real-time content as a source of joy and comfort for users who expect consistent entertainment from their favorite creators.

75%

of Gen Z and Millennials said they would be deeply disappointed if the influencers they followed suddenly stopped creating content.

31%

have even felt withdrawal while waiting for new content to hit their feeds.

Brie Larson on YouTube

Will Smith on TikTok

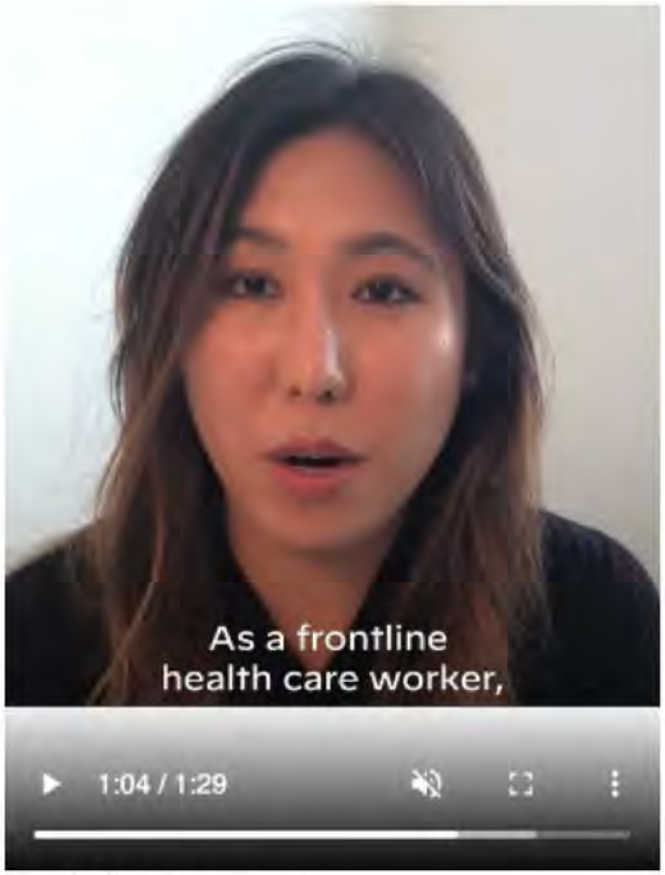
Thanks to stars such as Brie Larson and Will Smith who have cracked the code of YouTube and TikTok, the American celebrity paradigm is also shifting. Mega celebrities previously perceived to be untouchable have done away with the distance and mystique of old-school stardom, instead connecting with fans every step of the way.

CREATORS ARE USING THEIR PLATFORMS TO DISCUSS AND INVITE PERSPECTIVES ON TYPICALLY CONTROVERSIAL TOPICS

Instead of shying away from uncomfortable emotions or controversial topics, creators are leaning in—and their followers are along for the ride. In the wake of a polarizing US election cycle and a nationwide reckoning over racial injustice, creators of all kinds have recognized their own agency, often taking to their public platforms to express their personal views on contentious issues—from voting to vaccination—in order to get people comfortable talking about things that go deep.

The Biden-Harris campaign put this strategy to work by enlisting trusted micro-influencers such as nurses, teachers, essential workers and even truck drivers to distribute thousands of Instagram Stories to win over younger voters, which ultimately achieved a 1,600% higher engagement rate than using traditional celebrity influencers.[11]

NURSES FOR BIDEN

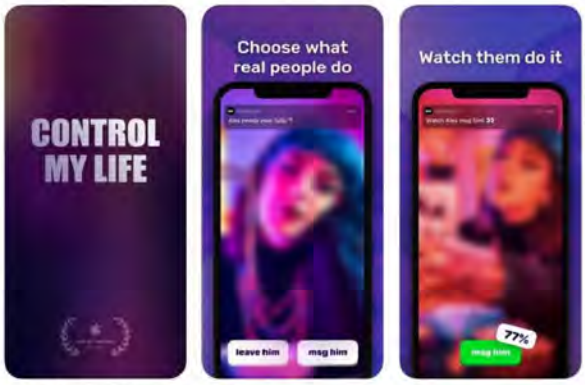


Nurses for Biden, Instagram campaign

[11] *PR Week*

CREATORS ARE BRANCHING OUT INTO SYNDICATED SELVES TO EXPAND THEIR REACH

Creators are expert storytellers who have embraced apps like OnlyFans, Patreon and Cameo to collapse the creator-follower relationship. Fans can vote on the creator's day-to-day decisions like a live choose-your-own-adventure-game on NewNew's "human stock market"-like platform. Twitter's new "Super Follow" option lets creators with over 10,000 followers share exclusive, members-only features like bonus content and newsletters with paying fans.



*The platform NewNew

*Walid Mohammed, as featured in "Young Creators Are Burning Out and Breaking Down", The New York Times

*Sweat, movie about creator Sylwia Zając

Where traditional celebrities have had breaks between shoots and schedules that account for downtime, the always-on expectations from content creators may not always bear well for their psychological well-being. *Sweat*, a movie based on the life of fitness motivator Sylwia Zając, tracks her rise to online fame and how she juggles the demands of both eager fans and sponsors, revealing the pressure of keeping up with influencer culture. TikTok's Creator Marketplace -- where brands can browse through a "catalog" of the most popular creator profiles -- positions people as commodities, pointing to emerging challenges facing the next generation of creators in the new passion economy.

ARCHETYPES

This set of emerging archetypes represent creators unlocking their inner selves to get real, empower and inspire their followers.

THE COUNSELOR

builds trust with followers and shares advice around personal anxieties and private matters

CREATOR
CAITLIN DOUGHTY

The mortician and "death-positive" creator wants to break down taboos and anxieties around death and aging while helping people confront their own mortality.

THE SAGE

preserves traditions and passes down advice and life skills to a younger generation

THE SAGE

CREATOR
DOÑA ANGELA

The grandmother from Michoacán shares her recipes through her YouTube channel, drawing over 1M subscribers in two months.

THE SAGE

CREATOR
ROB KENNEY

The YouTuber behind "Dad, How Do I?" offers fatherly wisdom in his skills-based tutorials.

THE NURTURER

motivates their followers with empowering affirmations to encourage followers to make positive changes in their lives

THE NURTURER

CREATOR
TABITHA BROWN

The actor and chef encourages her followers to try veganism with her big-hearted TikToks and catchy mantras.

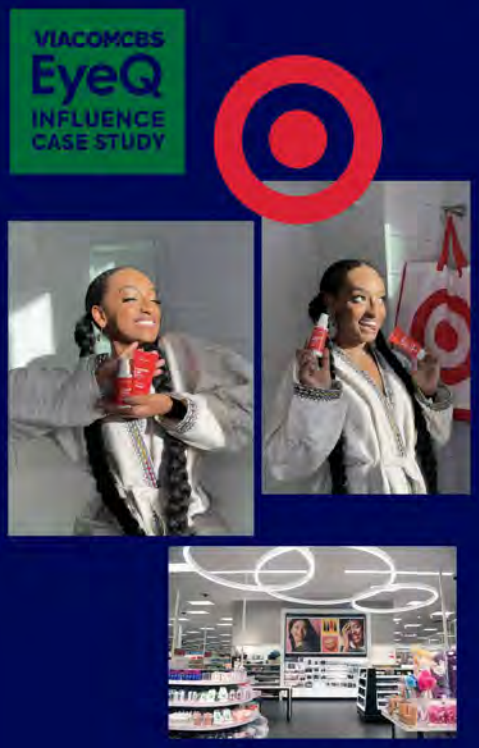
THE NURTURER

CREATOR
GABBY BERNSTEIN

The motivational speaker and author uses Instagram Live and her new podcast to answer audience questions and offer spiritual advice.

If the parasocial relationships between online creators and followers lend themselves to more opportunities for vulnerable conversations,

marketers must remain attuned to the intimacy of these relationships. ViacomCBS partnered with "skinfluencer" Liya Hizkias to host a candid Q&A with licensed dermatologist Dr. Mamina Turegano, where Hizkias championed acne positivity by sharing her favorite skincare tips around combating stubborn acne with Neutrogena products in "adorkable" fashion.



- Brands need to carefully consider how they place their messaging within these existing connections to maintain creators' realistic and transparent voices, which resonate with their audiences.
- For many consumers, their connection to and relationship with influencers is important and deep. In mainstream media, however, depictions of influencers are often superficial and opportunistic. Brands and media can disrupt these tropes to showcase the power of the influencer-follower relationship.
- Creators are forging deeper relationships with their followers, so existing quantitative metrics might not tell the whole story of connection. What kinds of metrics might replace today's KPIs (likes, clicks, follows) to take into account the real impact that influencers and content creators have on both their followers and culture writ large?

Chapter 3:

FROM EXCLUSIVE TO INCLUSIVE

From Benefiting a Select Few to Elevating Every Kind Of Creator

In 2020, America's racial reckoning and waves of protests were catalyzed by information and resources shared on social media, proving just how powerful online platforms can be in shedding light on systemic issues. Despite the opportunities and positive outcomes of participating in social media, our networks still propagate all types of -isms: sexism, racism, sizeism, ageism and more. As new kinds of content creators arrive on the scene and existing creators grow their followings, individual users are using social media not just as a machine for marketing or entertainment, but as a tool for teaching and learning. Recognizing this change, brands and platforms are following suit to amplify and support a more diverse set of creators—all in the effort to build a more inclusive social internet.

> *"This is the new Hollywood, and so a lot of old toxic traits from Hollywood are carrying over."*
> – Demetrius Harmon, YouTuber and comedian featured in "Marketers Are Underpaying Black Influencers While Pushing Black Lives Matter", *Bloomberg*

SOCIAL MEDIA USERS SEEK OUT POP EDUCATION IN THE QUEST FOR EMPATHY, LEARNING AND UNLEARNING

Multicultural audiences who typically don't see themselves represented in mainstream culture use social media to be seen and to feel seen. **29% of Multicultural consumers have sought out creators who share their ethnicity, race, gender identity or religion––compared to just 15% of white consumers**—in order to affirm their own identities.

Aaron Philip became the first Black, transgender and physically disabled model to sign with a major agency, normalizing the presence of marginalized identities in fashion and the push towards intersectionality. But even more Americans want their online spaces to be just inclusive and representative of all bodies—especially young people, who are driving the trend behind the desire to see more diverse creators thrive online.

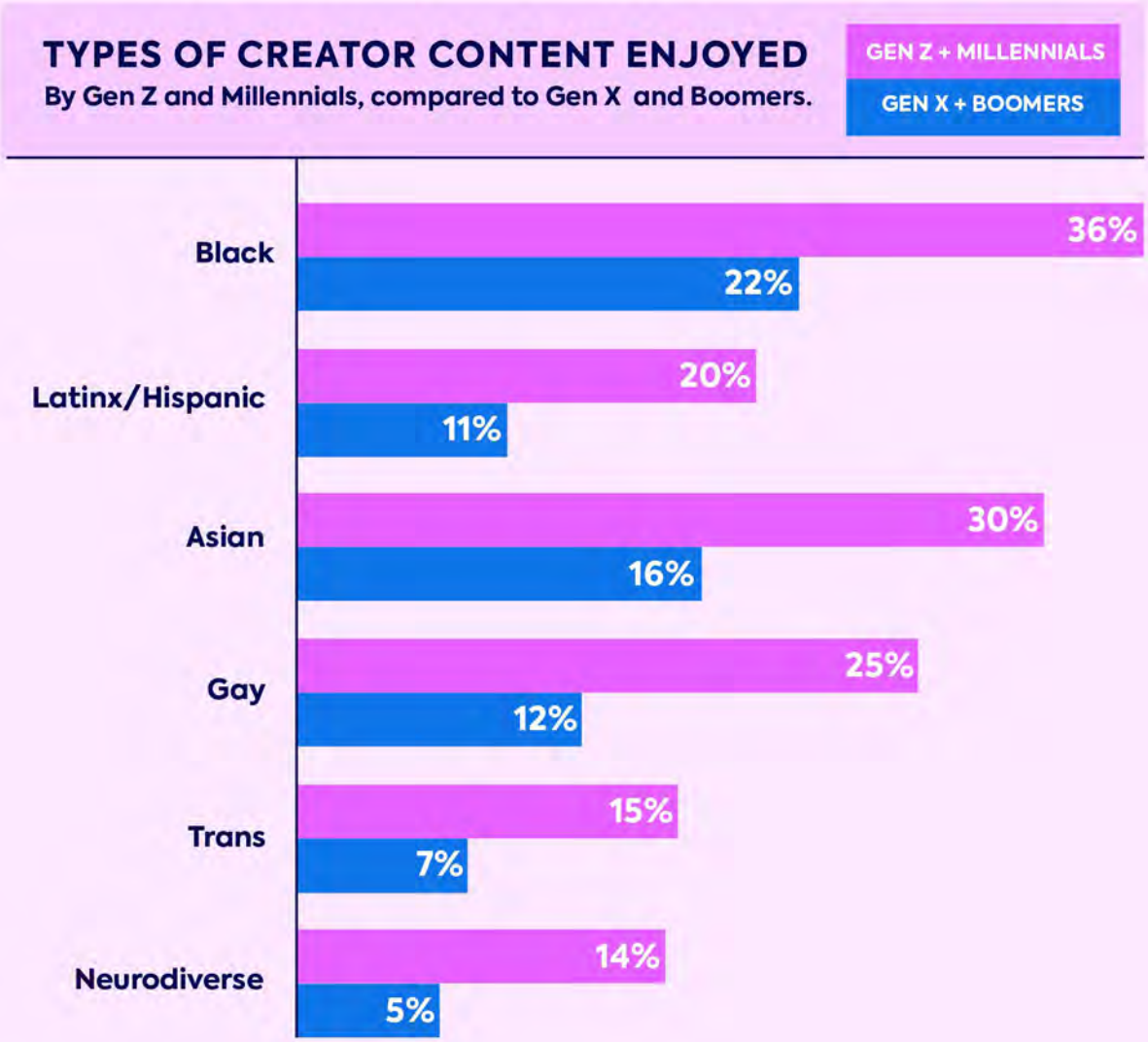
*Aaron Philip

*Sinéad Burke

*Chella Man

*Online Activism on Instagram

Those actively seeking diversity of all kinds turn to creators outside their immediate circle to expand their worldviews and shift their ways of thinking. **36% of Gen Z and Millennials have followed an influencer for the purpose of learning about and understanding someone from a different background.** Online activism in the form of user-made guides and explainers have taken over Instagram, a platform previously free of political content. And the impact is significant: **23% of Gen Z and Millennials have gained empathy for groups of people they don't belong to**, and **23% have changed their minds about an important issue.**



This intimate understanding of lived experiences can also lead followers down paths of self-discovery and even self-diagnosis. On TikTok, LGBTQIA+ content has helped viewers explore their sexuality, while female and BIPOC creators with A.D.H.D. have guided their followers through the diagnostic criteria of the disorder, which tends to be associated with young white males. In turn, self-directed social media users have been able to advocate for their own care.

> *Recently I followed someone who is Palestinian to learn more about their background. It showed me the constant trouble they continue to go through."*
> – Female, 22 / FL

> *I have friends from the LGBTQ+ community, so I began following some influencers from that group. I felt better prepared to respond when a family member came out as bisexual."*
> - Male, 57 / FL

CONTENT CREATORS ARE BUILDING A MORE INCLUSIVE INTERNET WITH THE HELP OF THEIR ONLINE COMMUNITIES

YouTuber and TikToker dreams don't just belong to exclusive influencers from Los Angeles. Underacknowledged, underfunded creators want to become entrepreneurs and break into the influencer community, which otherwise skews white, wealthy, heterosexual, cisgendered, and able-bodied, often replicating Hollywood's socialite culture.

This lack of diversity is often highlighted in call-outs from creators such as Kahlil Greene, a "Gen Z historian" on TikTok and Yale's first Black student body president. For instance, Black creators drive the most viral trends, yet receive fewer brand deals and are consistently paid less than their white peers without receiving equivalent credit or recognition for their talent. This pay disparity has led Black Gen Zers with smaller followings to forge their own content houses like The Collab Crib in Atlanta—dubbed the new Creator Capital—where diverse online creators are making it in an industry that wasn't necessarily built with them in mind.

*Disability Advocate Drewy Curious

*Atlanta TikTok house Collab Crib

*Kahlil Greene on TikTok

Influencer archetypes have also expanded to include other community leaders who are building awareness. The #ActuallyAutistic community creates content about the diverse experiences of people on the Autism spectrum, earning the hashtag on TikTok over 678M views, and helping destigmatize neurodiversity.

APPS AND PLATFORMS TAKE A CUE FROM CREATORS AND GET AN INCLUSIVE UPDATE

f* you pay me**

**FYPM: A "Glassdoor" for creators*

Pay disparities amongst influencers and algorithmic bias mean that social media is far from an equal playing field. In the absence of a regulatory body that can establish a social media code of ethics and ensure the safety of marginalized creators and users, community-led initiatives are closing the gap—"Glassdoor for influencers" F*** You Pay Me holds brands accountable for equal pay and fights the power imbalance affecting young inexperienced females today. BIPOC choreographers interested in gaining credit for viral dances on TikTok are copyrighting their iconic dance moves with the help of choreographer JaQuel Knight and Logitech through a system known as "labanotation."

With diversity in the larger creator ecosystem sorely lacking, both creators and individual users are changing their production and consumption behaviors, which has prompted social media platforms to adopt new features that appeal to a diverse audience. Platforms like Instagram and LinkedIn have made dedicated space for people to add their pronouns to combat misgendering and create new standards of gender fluency. Alt text and captions make visuals legible for screen-reading, helping visually impaired users.

Both creators and audiences flock to platforms to find the landscape that best suits their needs. TikTok's more inclusive content algorithm attracts Black and Latinx teens, with over 39% of BIPOC Gen Z and Millennials using TikTok.[12] Instagram's latest on-platform campaign features diverse, "culture-defining" creators calling for a period of reinvention after a challenging year. Social audio platform Clubhouse aims to foster an inclusive culture that combines the best of the podcasting world with easy access to diverse creators, and chat rooms dedicated to BIPOC users. Twitch introduced 300 identity-based tags covering race, gender and disabilities, improving discoverability and representation for minority creators on the platform.

**Instagram's "Who We Become Is Yours To Make" campaign*

[12] *YPulse*

ARCHETYPES

This set of emerging archetypes represent creators challenging current systems to help followers make a larger cultural impact.

THE
EDUCATOR

provides essential information based on their specialized education or experience

THE
EDUCATOR

CREATOR
JAMES JONES

The Indigenous creator educates TikTokers on Cree style and hoop dancing as a form of healing and decolonial knowledge.

THE
LEADER

galvanizes their followers around social and political issues

The historian and mental health advocate educates her Instagram followers about the nuances of intersectionality.

THE
LEADER

CREATOR
BLAIR IMANI

THE
COMIC

alleviates stress and offers commentary through comic relief

THE
COMIC

CREATOR
LEJUAN JAMES

The comedian and author creates satirical videos about growing up Latinx in America.

If influencer partnerships are opportunities for teaching and learning,

then brands can pioneer creator programs that drive empathy and understanding of different lived experiences. To honor AAPI Heritage month, Spotify partnered with leading AAPI artist Anna Akana to promote its dedicated hub that amplified AAPI musicians and influential voices, podcasts addressing racism and xenophobia, as well as personal stories from employees honoring their heritage.

VIACOMCBS
EyeQ
INFLUENCE
CASE STUDY

**Spotify's #StopAsianHate campaign*

- Truly inclusive content allows misrepresented communities to control their narratives and advocate for their audiences. Champion all types of diversity and amplify the voices of those whose stories are rarely told, including neurodiverse, disabled, and Indigenous creators.
- All social media audiences are not alike, and different communities have nuanced ways of communicating across platforms. Stay alert and tuned into your audiences, particularly when addressing specific communities (i.e. Gay TikTok or Black Twitter).
- BIPOC creators are not only underrepresented, but they're also often flattened into proxies for their racial identities. Invest in sustained relationships with BIPOC creators, but don't solely turn to them for their racial identification—highlight their interests, their talents, and the joys of their lived experiences.

Chapter 4:

FROM CANCEL TO COUNSEL

From the Punitive Culture of "Calling Out" to the Restorative Nature of "Calling In"

Cancel culture, according to author and journalist George Packer, is "a buzzword that creates more confusion than clarity." To cancel is no longer seen simply as an extreme action from the public to condemn a famous or powerful person's problematic behavior. Not all cancellations are created equal: from baseless amusement to career-damaging criticism, there's no single consequence or cause for cancelling.

37%

of Gen Z and Millennials think that the primary goal of cancel culture is to make people accountable for their actions, while

29%

think it is to be petty.

The pendulum swings back and forth between cancel and counsel culture, calling out and calling in—between large swathes of the internet and a powerful few. And when hijacked as a phrase by the far-right to mock the left, it further fuels the circular debate around how society should hold celebrities and creators accountable for actions deemed offensive or problematic. When a brand's market value is combustible because the creators who represent them are "cancellable", the conversation must evolve to redefine and navigate the chaos of being a creator in a more discerning, participative internet.

> *The least important thing to know about creators is the content that they create; more important is the commentary they generate."*
> - David Craig, co-author of "Creator Culture"

CALLS FOR ACCOUNTABILITY RESULT IN REAL REPERCUSSIONS

While social media users may be deeply divided over the act of calling out others, the conversation still centers around holding powerful creators with large followings accountable—especially when that collateral damage comes in the form of lost followers and brand partnerships.

YouTube star David Dobrik and his creator collective Vlog Squad came under fire for enabling sexual assault following an explosive Insider investigation into rape allegations made against a member of the squad. Despite several apology videos addressing the controversy, Gen Z consumers remained critical and unconvinced of Dobrik's sincerity—calling for him to step down from his photo-sharing app Dispo's board and leading him to lose sponsorships with brands as well as 300,000 subscribers and over 2.3 billion views as of March 30, 2021.[13]

48%

of Gen Z and Millennial consumers have unfollowed a creator for doing something offensive or objectionable.

> *Walk the talk. If you advocate for, or against, something, don't be caught out as a hypocrite. If you get caught, you lose ALL credibility. And in this continuous news cycle/digital everything/big brother world, you WILL get caught."*
>
> - Female, 63 / UT

Fans will not stand for creators who use their platforms to blatantly abuse their power. Following underage sexting and online-grooming allegations against beauty vlogger James Charles, Twitter users called for cosmetics brand Morphe to stop marketing James Charles' eyeshadow palette, while YouTube originals series *Instant Influencer* dropped him as Season 2 host and concerned parents started a change.org petition revoking his 2021 Teen Choice Award. With his YouTube channel temporarily demonetized, Charles's biggest earning streams and subscriber count took a significant blow, proving that bringing an issue to the court of public opinion means real consequences for the accused.

[13] *Social Blade*

TEA CHANNELS AND INVESTIGATION UNITS ARE THE NEW TMZ

A closer look within the digital creator community will reveal that cancellation is, in and of itself, a cottage industry that thrives on gossip and the attention economy. The expectations some social media users have from controversial reality TV have seeped into the internet, leading them to demand the same level of entertainment value from current online spaces.

23% of Gen Z and 18% of Millennial consumers follow "tea accounts",[14] which are anonymously run social media accounts that share celebrity gossip and niche drama between influencers. Tea accounts like Deuxmoi and TikTok Room thrived in 2020, growing more than tenfold in the same time span.[15]

Where accountability falls short, dedicated followers go even deeper. **16% of Gen Z and Millennials have actively reviewed a creator's history** and **12% have investigated the creator's relationship with other creators.** In fact, Gen Z is nearly three times more likely to commit the time and energy to reviewing a creator's history of wrongdoings.

The "This you?" meme represents the trend towards investigation units, usually aimed at a person's or brand's performative messages of solidarity followed by a screenshot highlighting their past problematic behavior. The lighthearted meme took off on Twitter in the wake of the Black Lives Matter movement when countless influencers came out with dedicated public posts condemning systemic racism, prompting Black voices on social media to call out blatant hypocrisy via "receipts" and archived tweets while calling for real action.

[14] YPulse
[15] Vox

COUNSEL CULTURE CREATES A NON-TOXIC TAKE ON CANCELLATION

As social media continues to transform into a space of relatability, education and networked therapy, cancel culture has the potential to morph into something kinder and more accepting of change.

Counsel culture offers opportunities for self-improvement —so long as the perpetrators of harm share their process as they strive to become better and more culturally responsible power-holders. "Counsel culture" was invoked by Nick Cannon, who sought to go beyond the Notes app apology trope, take responsibility for perpetuating anti-Semitism and educate himself through conversations with Jewish leaders.

39%

of Gen Z and Millennial audiences have forgiven a creator after they did something objectionable—and over half of these have done so within a few days.

> *I need for more people to do their own research on how to be respectful to others... Do your research and actually do better. Don't just say you will.*
>
> - Non-Binary, 28 / IL

User engagement with canceled creators is surprisingly forgiving. In fact, after a creator has done something objectionable, **15% of Gen Z and Millennials have tried empathizing with them,** and **9% tried teaching the creator why what they did was wrong.**

Since more and more online creators are growing up in full view of their followers, young social media users focused on personal growth are ready for something less punitive. As they watch their favorite creators rise through the ranks of cultural influence, they recognize the responsibility of leading by example and owning up to one's mistakes.

HATERS GONNA HATE, PROVOCATEURS GONNA PROFIT

While cancellation may be seen as a near inevitability—after all, who hasn't done something problematic at some point in their past?—it doesn't always mean that a creator's career will end. Some creators might benefit from leaning into the "drama economy," a growing industry built on excavating drama between influencers, deep-diving into gossip and spilling the tea.

*Ethan Klein and Trisha Paytas

Commentators like D'Angelo Wallace, Allegedly Adam, Def Noodles and Diet Prada have built entire careers off of accounts that analyze other creators' drama. Influencers involved in online feuds and fall-outs—such as Ethan Klein and Trisha Paytas as former co-hosts of the massively popular *Frenemies* podcast—have started adopting clinical terms like "narcissistic abuse" and "gaslighting" to up the ante of internet feuding. Influencer drama has gained so much ground that some digital creators even enlist their own publicists to distribute stories and bring in revenue.

Hello Stephanie,

Happy Wednesday! I hope life has been treating you well! My name is [redacted], and I am a publicist with [redacted]. We specialize in representing Tik Tok and digital creators. I am reaching out to share a new story detailing the "feud triangle" that erupted between Addison Rae, Bryce Hall, and the Talabi Twins on social media. I have attached the full story to this email along with relevant screenshots pertaining to the story. Please let me know if Buzzfeed would be interested in "spilling the tea" and covering this story! I know there is a lot to unpack here so feel free to reach out if you have any questions at all. I hope you have a wonderful rest of your day!

*TikTok creators hire their own publicists

For some, being provocative increases notoriety and star power. The infamous Jake and Logan Paul have transformed from problematic YouTubers to professional boxers, garnering a growing subscriber base despite being suspended from the platform and even raided by the FBI.

The comedian Ziwe Fumudoh expanded her provocative Instagram Live interview series with "cancelled" stars to a live talk show on Showtime, where she continues to flip the power dynamic with her pointed questions and piercing gaze.

*Ziwe on Showtime

MOVING PAST CANCELLATION MEANS GOING BEYOND LIP SERVICE

Cancellations are at best a moving target with no clear rubric for what is bad enough, or whose apology is truly sincere. But the favored response is an apology nonetheless: 63% of Gen Z consumers agree a celebrity should apologize immediately when they get cancelled for a controversial action, while 50% agree they should explain the decision that led up to the controversial action.[16]

> *"The thing about apology videos is that they are often dramatic and involve more tears than necessary. Just acknowledge that what you did has real-life consequences and then take a break! You don't need to feed the flames."*
>
> - Female, 21 / NH

67%

of Gen Z consumers agree any controversial action from a celebrity should have happened recently for them to be held accountable.[17]

'I WAS A TROLL'

CHRISSY TEIGEN SORRY FOR PAST ONLINE BULLYING

**Chrissy Teigen*

Cancelled celebrities looking to earn forgiveness have tried several tactics, from a self-imposed social media hiatus—Jenna Marbles quitting her 20 million subscribers-strong YouTube channel over past racist and sexist videos—or detailed defenses, such as Chrissy Teigen's blog posts explaining her past cyberbullying and toxic behavior.

[16] YPulse
[17] YPulse

ARCHETYPES

This set of emerging archetypes represent creators sounding the alarm about industry-wide issues and helping their followers make sense of it all.

THE EXPOSER

calls out problematic behavior and shines a light on injustice

THE EXPOSER

CREATOR
DIETPRADA

The "most feared Instagram account" in the fashion world calls attention to racism, plagiarism, and inequity in the industry.

THE INFORMER

steps in to fill in the gaps left by traditional news media

THE INFORMER

CREATOR
HASAN PIKER

The progressive political commentator has taken to Twitch, streaming live election commentary and hosting political events.

THE INFORMER

CREATOR
CRONKITE NEWS

The newsroom at Arizona State University's Cronkite School of Journalism, a subsidiary of Arizona PBS, makes local news accessible to Gen Z through lively TikTok videos and challenges.

If there's no one roadmap for cancellation,

then brands become the levers for true and lasting consequences, since brand deals can often signify the tipping point of true cancellation. Brands are increasingly cautious about who they partner with, fearing backlash over their association with problematic influencers. But there's little cause for concern: **only 9% of Gen Z and Millennial consumers would definitely stop supporting the corporate partner of an influencer who got canceled for something truly objectionable,** while **27% don't think about the consequences of these partnerships at all.** Gen Z might be even more favorable than Millennial consumers to brands—they are twice as likely as other generations to say brands should not be punished for their influencers' missteps.

> *"Everybody online who captures a significant amount of attention has amplifiers and adversaries, advocates and detractors."*
>
> – Jonathon Morgan, founder and CEO of Yonder

- Understand your own brand values deeply. Brands are the holders of the keys and have ultimate control over the relationships they pursue, and cancellation is often determined by a brand's sense of morality. Brands working together with potentially risky creators must navigate this chaotic cultural landscape based on their own moral compass and previously established corporate values.

- Depending on the circumstances, some creators not only survive but thrive following their cancellation. Know the audience who is calling for cancellation and their motivations before deciding how to respond.

- Brands that find themselves in the middle of a cancel culture controversy with an influencer partner should manage the situation like any PR crisis—start with an apology, own up to your mistakes, show how you're learning and changing, and clarify your course of action.

Chapter 5:

VIACOMCBS

EyeQ

Leveraging the Power of Influence

SUMMARY OF BRAND & CONTENT IMPLICATIONS

As influence permeates society in uncountable ways, brands and marketers looking to engage creators can stay ahead of the curve by aligning with these four key strategies.

#1: From Creator to Corporation: **Creator-Forward Brand Partnerships**

Think beyond the typical brand-creator relationship to stretch the limits of what a mutually beneficial collaboration with an online creator looks like, given all the possibilities of "creatordom" today—from one-off collaborations to investments in early-stage creators.

#2: From Curated to All-Access: **A Culture of Open Sharing**

Ditch superficial depictions of influencers for the realistic, transparent voices that help creators forge intimate bonds with their followings, leaning into their impact on culture at large and bottom-up fandom.

#3: From Exclusive to Inclusive: **Radical Representation**

Instead of flattening marginalized creators and audiences into proxies for their racial identities, treat creator programs as opportunities to understand and highlight diverse creator interests amongst your consumers, relying on the creator's expertise in how to insert your brand into nuanced online cultures.

#4: From Cancel to Counsel: **An Audience-First Contingency Plan**

Part of being a modern-day brand is navigating a potential cancellation's inherent chaotic cultural landscape, which means understanding your own brand values deeply enough to determine whether your priority target market is driving the conversation, and what role you would need to play to facilitate learning, action and growth.

VIACOMCBS

EyeQ INFLUENCE

The benefits of an Influencer Marketing agency, fueled by a leading global media company, for measurably better results

The fluidity of influence today adds new layers of complexity, turning basic addition into multivariable calculus. ViacomCBS' EyeQ Influence helps simplify the complexity by delivering star-power talent, authentic creative, dynamic production, and guaranteed media at scale—all in one, easy-to-use place.

As a company with a legacy of entertaining fans through iconic shows that have transcended generations, ViacomCBS is uniquely positioned to connect brands with this audience through EyeQ Influence—a powerful influencer marketing offering marked by 600 campaigns and partnerships with over 3K talent.

TALENT AND CREATIVE OPTIONALITY

Access to Any Talent

With nearly 100 years in Hollywood, ViacomCBS has been cultivating relationships and growing stars—from Jojo Siwa to RuPaul, Awkwafina to Phoebe Dynevor, and beyond. By leveraging ViacomCBS' deep roots in the talent industry, EyeQ Influence empowers marketers to partner with the best fit for their brand by providing extensive optionality, with access to micro-influencers as well as fully-fledged celebrities. Our new approach to influencer casting and content approvals can be optimized in real time, allowing us to identify the most relevant talent before they even "blow up".

TALENT AND CREATIVE OPTIONALITY

Stronger Talent Matching

EyeQ Influence's Talent Match Tool seamlessly pairs a brand with talent based on a custom approach rooted in qualitative and quantitative insights. Brands can use our proprietary CMS to interact with a comprehensive list of talent recommendations via direct feedback, ranking and approvals. We've introduced an Audit feature that dissects top performing posts and content themes across brand campaigns, and then leverages those learnings to inform our strategy. By auditing an archive of influencer campaigns, followership, and content themes, the Talent Match Tool will help set up relationships that align with your brand's goals.

COMMITMENT TO DIVERSITY

Propelling Diversity at all Levels — The advertising community has upped the ante on commitments to diversity and inclusion, looking to be the change that inspires a world where people of all kinds feel seen and respected. ViacomCBS has been blazing the trail of diversity and inclusion with key initiatives, internal policies, and centralized research, leveraging its premier position in media to propel diverse voices through custom campaigns.

Authentic Stories — in order to tell stories authentically, diversity behind the camera is crucial. ViacomCBS is investing and building equity in future voices through three key initiatives:

*Content for Change

*CBS's Writing Mentor program

Content for Change, which supports the creation, distribution, and promotion of content that will help drive the critical changes needed to eliminate systemic racism and inequality in America.

CBS's Writing Mentor program, which partners young creators with established BIPOC and female industry leaders to help launch their careers.

COMMITMENT TO DIVERSITY

*Nick Stands

*First-Time Director's Program

Nick Stands, which is an ongoing commitment to inspire and support standing up to racism. The mission encompasses a broad collection of work designed to foster anti-racist, inclusive viewpoints among Nickelodeon's audience.

First-Time Director's Program, which places first-time BIPOC and female filmmakers in the director's seat for the development of 50 films across ViacomCBS' entertainment portfolio.

Creative Teams — ViacomCBS created R.E.D.I. (Representation, Equity, Diversity, Inclusion), a database of leading BIPOC production teams, to ensure that diversity is upheld when responsibilities are outsourced outside of ViacomCBS.

Talent Casting and Talent Pay — Pay equity and marketplace transparency make inclusion more than a buzzword. ViacomCBS establishes fair rate benchmarks through annual audits to make sure that all talent is paid equitably.

CONNECTION TO CULTURE

Expertise in Creative & Activation

Talent may be the lifeblood of an influencer marketing campaign, but without a powerful story to tell, it's hard to capture an audience's attention. ViacomCBS deploys an army of creatives for every campaign. This team's extensive production expertise and deep platform fluency makes them agile, objective-driven leaders of creative excellence.

Proven Storytelling

ViacomCBS continuously invests in leading edge and innovative tools to maximize attention outcomes and minimize risk for all brand partners—driving results in a maturing market of influence. By pressure-testing each element of creative to ensure it hits the mark with customer surveys, predictive performance tools, and innovative ideas that take big ideas further, ViacomCBS not only puts its work under the microscope, but also builds high standards of accountability when designing a campaign strategy. EyeQ Influence offers brands a strong recommendation engine, powered by data, innovation, and an orientation toward outcomes.

CONNECTION TO CULTURE

Access to Tentpoles

ViacomCBS leverages influencers to create content tethered to culture-driving tentpoles, bridging the content experience across all the moments and platforms that fuel fandom. ViacomCBS' portfolio of premium content and experiences inserts brands into viral, culture-defining moments, placing them at the heart of audience conversations.

Thought Leadership

ViacomCBS' centralized collaborative team of strategists leverage cultural, audience, and industry insights to accurately and authentically connect brands to culture, while providing thought-leadership across multiple annual studies.

*LatinX in America

*Black in America

*Asian in America

*Forecast of Gen Z's Emerging Values + Behaviors

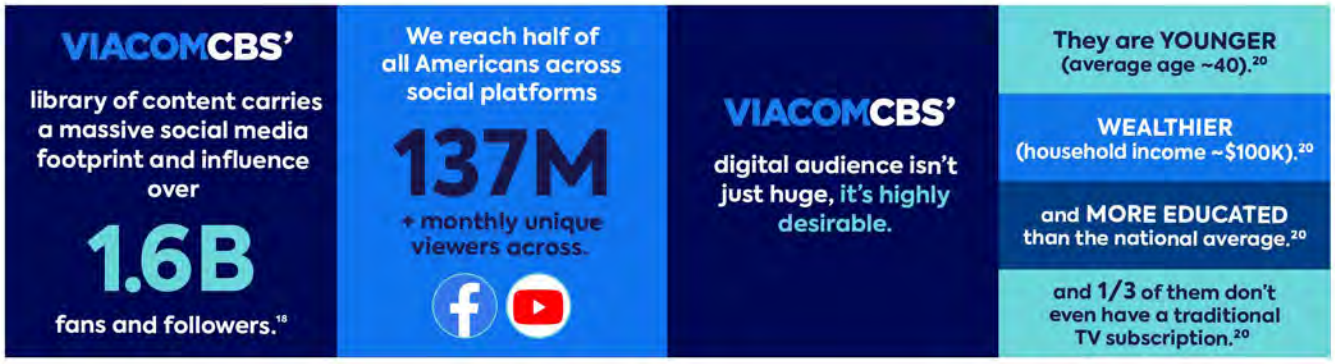
UNRIVALED SCALE

Guaranteed Media

As organic posts can get lost in the algorithms, media support can provide the critical boost that gets content into consumers' feeds. ViacomCBS delivers complex content strategies by converting influencer handles into working media platforms to drive KPIs and create successful campaigns.

Scale of Distribution

ViacomCBS' greatest differentiator is its unmatched distribution. Reaching 60M full episode unique viewers in the US monthly through EyeQ Video, and over 130M across social platforms, ViacomCBS has unrivaled scale in connected video.



COMBINED POWER OF VIACOMCBS EYEQ

EyeQ Influence means massive, unrivaled reach for influence creative and premium quality – both in the physical product (the talent, the storytelling, the distribution) and the process behind it (the casting, the creative development, and media optimization). EyeQ Influence combines the nuanced elements of talent, culture and reach with a multidimensional campaign to deliver on all aspects of the marketing funnel, and reach audiences across platforms at scale.

[18] *ViacomCBS Global Social Media Presence across Twitter, Facebook, Instagram, YouTube, Tumblr, Snapchat and TikTok, December 2020*
[19] *Tubular Labs - total monthly unique viewers across ViacomCBS properties on Facebook and YouTube, November 2020*
[20] *Nielsen TV Reach (all CBS and Viacom networks combined), comscore unduplicated reach (CBS Interactive, Viacom Digital, Pluto.tv), May 2020*

APPENDIX

PLATFORMS TO WATCH

Brands and creators looking to make a dent in the sprawling landscape of influence should watch out for these new and emerging social media platforms, from invite-only communities to open-access networks.

	WHAT IT IS	AUDIENCE	BRAND ENGAGEMENT	INCENTIVE FOR CREATORS
NEW NEW	A social network where fans pay to vote in polls to control a creator's day-to-day decisions through app integrations on TikTok and Instagram.	Invite-only: currently in beta mode.	Brands can encourage fans to vote and direct the personal lives of their favorite creators while participating in personalized communities built around popular interest and topics.	Creators can turn their mini-polls into a source of income and gain insights into fan behaviors.
Discord	An online hangout space, originally built for gamers, where users communicate via audio/video calls and text messages while also being able to share & collaborate on files & other media. Discord servers are organized into topic-based channels, similar to community chatrooms.	150 million monthly active users, and 19 million active servers each week.	Brands can engage with loyal customers. Chipotle and fashion retailer All Saints have held events like virtual job fairs and fan Q&As using Discord's audio channel feature. Jack in the Box livestreamed a concert with The Aquabats and hosted a Comic-Con afterparty complete with its mascot and giveaways.	Invite-only servers offer an enclosed space to interact directly with fans. Creators with sizable followings can become a Discord Partner.
clubhouse	A social audio app where invited users can host live conversations in audio chat rooms accommodating groups of thousands of people. Clubhouse is a new type of voice-based social product that lets people develop ideas, deepen friendships and meet interesting new people around the world.	Over 2 million active weekly users on the app.	Brands themselves can host chats or sponsor chat rooms. Restaurant Brands International (RBI), which oversees Burger King, Popeyes and Tim Hortons, gathered customers in an "Open Kitchen" call where company executives talked about Q4 2020's earnings results.	A networking tool. Part of Clubhouse's appeal is the chance to hear from and even participate in unvarnished conversations with famous, powerful people from Oprah to Ashton Kutcher.

APPENDIX

	WHAT IT IS	AUDIENCE	BRAND ENGAGEMENT	INCENTIVE FOR CREATORS
PATREON	A multi-tiered membership platform founded by a creator that provides business tools for content creators and artists to run a subscription service, helping them earn income through rewards and offer perks to paying fans and subscribers, or "patrons".	Over 6 million monthly active supporters. Patron numbers have increased by 50% over the past year and tripled over the last three years.	Creators who don't rely on brand partnerships use Patreon as a primary source of revenue, but it's also a valuable tool for marketers who are seeking out influencers with the most loyal, supportive followings.	Creators can make money every month, per post released or for every new batch of exclusive content in a way that keeps their patrons engaged.
OnlyFans	A content subscription service that revolutionizes creator and fan connections by letting creators and artists from all genres get funding directly from fans on a monthly subscription basis, as well as via one-time tips and pay-per-view.	Around 120 million daily active users, rising from just under 20 million pre-pandemic.	Brands interested in broadening their audiences see OnlyFans as a new avenue to connect with the most dedicated fans through exclusive content. Rebecca Minkoff took to her OnlyFans channel to live stream her Fall 2021 runway show during New York Fashion Week, where fans got behind-the-scenes access, including chatting with the designer herself in an hour-long conversation for a fee.	Creators can monetize their content by setting their own subscription price for selling certain content, while developing authentic relationships with their fanbase.
fancircles	A fan engagement platform designed for music artists. YouTubers, media properties and celebrities reach their fans directly through their own digital fan clubs.	100,000 monthly active users.	While the platform is designed to help creators avoid the limitations and algorithms of ad-based social media platforms, brands can seek out and partner with creators who want to grow their fandoms by helping them launch exclusive signed merch and unique collectibles.	Revenues are driven by how engaged fans are with the creator's social media and email content. Strong social media engagement can drive the top 10-20% of followers to a creator's fan club. On average, 1/3 of platform users upgrade to premium access.

APPENDIX

	WHAT IT IS	AUDIENCE	BRAND ENGAGEMENT	INCENTIVE FOR CREATORS
twitch	A video live streaming service where users can watch live streams from their favorite gamers, musicians, fitness trainers, and more. The platform enables gifting from fans and subscribers — generating revenue for creators.	3 million broadcasters monthly and 15 million daily active users, with 1.4 million average concurrent users.	Old Spice's 2015 "Old Spice Nature Adventure," a campaign in which they livestreamed the adventures of a man in the woods, still remains one of the best examples of branded content on Twitch, with over 2.6 million views, of which 1.4 million viewers engaged with the chat. Exclusive Old Spice emotes were used more than 1,050,000 times.	Twitch streamers have many ways to make money, including donations, advertisements, subscriptions, and sponsorships. Just like in real life, viewers can donate money to Twitch streamers in the form of "bits." On average, they are worth $0.01 each.
STEAM	A cloud-based gaming library that acts as the ultimate destination for playing, discussing and creating games online, allowing for users to connect with their friends and meet new people all in one place.	Approximately 120 million monthly active players in 2020, a significant increase from 95 million monthly active users in 2019.	While Steam is largely gamer-focused, brands and devopers looking to market and promote their upcoming games on Steam can distribute "keys" among video influencers to track game page views and engagement.	While the user-driven platform is designed solely for gameplay and discussion, game influencers can be approached by developers testing out their game and act as Steam Curators to make recommendations to users on which games to play and which ones to avoid.
cameo	A video-sharing platform that lets users commision over 30,000 actors, athletes, artists and celebrities of all types to create personalized video messages, helping celebrities connect with their fans through personalized shoutouts.	100,000 monthly active users.	The Cameo for Business program helps brands tap into the platform by developing contracts with stars for ads, minus the price tag of a traditional celebrity endorsement. Universal Pictures generated hype for the summer movie season by hosting a sweepstakes that sent fans personalized celebrity messages from F9 stars like Vin Diesel and John Cena.	Actors, artists, and influencers can set their own rates for a Cameo video appearance, ranging from as low as $1 to as high as $1,500.
DISPO	A camera-based social media app that lets you live in the moment, where users snap photos and only get access to their "developed" rolls the next morning to share with friends and create their own community.	The Dispo app surpassed 5 million downloads worldwide and 100 million photos taken, as of April 2021.	Brands interested in using Dispo as a marketing tool can't advertise the same way they would promote elsewhere, but they can use the photography-based app to learn more about their target demographics and build an authentic brand presence instead of trying to solely sell to them.	While the app is still in beta-testing mode, creators can use features like shared Rolls to build a community in a more intimate space that values authenticity.

METHODOLOGY

ViacomCBS Velocity's Creative Strategy & Cultural Intelligence team conducted the following combination of quantitative & qualitative research approaches:

Culture Tracking

Insights unearthed through semiotics, cultural and social analysis, AI and machine learning and consumer research to harness a deep cultural understanding of macro drivers and shifts in behavior.

Nationwide Quantitative Study

The quantitative sample was collected over one week period in June 2021, totaling 1,209 completed responses, using a 95% confidence level and a 2.82% margin of error, based on an estimated total US adult population of 258,000,000.

An original sample was collected which was then weighted to demographic characteristics of the US population including, but not limited to: geography, age, gender, ethnicity, and income.

Weighting is combinatory in nature, such that demographic characteristics are mapped to known American Community Survey (also known as the census) data rather than individually weighted in a vacuum.

The approach also utilizes a technique called "known sampling" in which identity of respondents is verified for accuracy.

All data featured in the Culture of Influence report is from ViacomCBS's proprietary study unless otherwise reported.

Expert Interviews

Five 1:1 phone interviews were conducted in June through August 2021 with US creators, academics and c-level executives. Respondents were compensated for their time.

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