

Case study: YouTube star vloggers

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Overview

A small group of individual online video creators, or vloggers, who upload video blogs ('vlogs') to YouTube, have risen to fame over the last few years by amassing millions of subscribers and views to their videos on YouTube, generating significant revenues for the platform and themselves. These star vloggers have created a new form of very popular online content by speaking directly to their teenage audience with regard to tone, feel and issues covered, which primarily address favourite teenage topics such as beauty and fashion or simply doing funny things like challenges or playing pranks.

In line with their rising popularity, the level of professionalism has increased over the last two years, which ranges from improved video production quality to the ability to make monetisation and brand positioning more efficient. This has had the effect that all of the star vloggers addressed below now make a living out of their hobby. With the help of management from multi-channel networks (MCNs) and talent agencies, they have been able to build different revenues streams, ranging from advertising to brand sponsorships to merchandising.

PointlessBlog homepage

The Annoying Challenge!

639,032 views · 1 day ago

- The Annoying Challenge!
- Louise's Video: <http://bit.ly/1BqT3KZ>
- Order My Book: <http://bit.ly/ThePointlessBook>
- Subscribe To Me: <http://bit.ly/PointlessBlog>

- Click Thumbs Up if you're feeling nice!
- Comment below: Allie is the KING!
- PrankVsPranks Video: <http://bit.ly/1uJHxUo...>

Read more

My Buddies ^_^

- PointlessBlogTv
- alliegames
- Zoella
- Marcus Butler
- Caspar
- MyNamesChai
- JacksGap
- Sprinkleofglitter
- Tyler Oakley

[Source: YouTube/PointlessBlog]

While their success is closely tied to YouTube as a platform, star vloggers use a number of social media sites to promote their content as well as their own websites and apps to connect with their fans. In the US, some star vloggers have

ventured into producing shows for linear television.¹ Here in the UK vloggers like Dan and Phil have their own radio show on Radio 1.²

While star vloggers increasingly use other publishing outlets, the key elements of their success remain the same: a close and interactive relationship with their audience. This is reflected in the growing popularity of meet-ups for YouTube stars and their fans. Vidcon, an annual convention that was hosted for the fourth time this June in Los Angeles, sold 20,000 tickets this year and has become a must for fans and star vloggers from all over the world to attend. Similar events in the UK are starting to gain popularity, too. This August, Summer in the City, an event at Alexandra Palace, had over 8,500 paying attendees.³ Because of the global nature of YouTube, UK vloggers' audiences are not nationally defined: they bring their content not only to their British audience, but to their fans around the world.

Background and context

The rise in popularity of this new type of content and the making of new media personalities in the process is directly linked to YouTube as a platform. Founded in 2005 and acquired by Google in 2006, YouTube is the world's largest online video platform, enabling anyone with an internet connection to upload, share, view and comment on videos. The comment section below each video allows creators and viewers to interact. Examples include seeking/posting feedback, posting links/additional information or crowdsourcing ideas. Viewers can also subscribe to channels.

Unlike the linear one-to-many model of traditional broadcasters, YouTube supports many-to-many on-demand communication without a gatekeeper.⁴ Any video can be put online, with none of the restrictions that define what content is delivered through traditional broadcast media. Also, as a global platform, YouTube provides potentially enormous scale for video producers, in particular when output is in English.⁵

These features of the platform have provided the opportunity for individuals to create videos of any length, content, production quality, etc., and upload them to be viewed millions and in some cases even billions of times, as in the case of Swedish gamer PewDiePie (who currently has had 5.7 billion views on his YouTube channel). As the features of the platform allow a direct interaction between creators and viewers, this feedback loop has given creators an understanding of what their audience wants. The combination of listening to their audience and keeping them engaged is key to the success of vloggers.

However we must be wary of seeing star vloggers as simply the most successful producers of the user-generated, many-to-many content that characterises YouTube content. The most popular vloggers are signed by talent agencies,

¹ <http://deadline.com/2014/08/youtube-star-grace-helbig-to-topline-e-comedy-talk-show-pilot-815201/>

² <http://www.independent.co.uk/news/media/tv-radio/radio-1-to-hire-youtubefamous-vloggers-to-broadcast-online-9686208.html>

³ <http://www.theguardian.com/technology/2014/aug/08/youtube-convention-celebrities-young>

⁴ Generally, videos are only taken down for legal reasons (as for example copyright infringements) or if they violate platform rules.

⁵ YouTube is currently localised in 61 countries and languages and offers near global reach (given country presence and copyright constraints). In June 2014, YouTube had 839m unique video viewers worldwide (comScore Videometrix, PC only). According to Google, over 1 billion people watch more 6 billion hours of video every month in YouTube (<https://www.youtube.com/yt/press/en-GB/statistics.html>)

produce regular content as a full-time job, and promote their brand through multiple channels. Top-tier vloggers fit much more easily into the context of television than that of archetypal YouTube fare such as skateboarding dogs, especially taking into account the sort of short, sketch-based comedy made for and partially by young people and broadcast on Nickelodeon and the Disney Channel over the past few decades.⁶

Content strategy

Vlogs are a unique form of content because of their tone and feel: vloggers often film themselves in their own homes, speaking directly to the camera and to their viewers and uploading primarily short clips on a regular basis. The tone is young and fresh and the narration is personal and engaging, which means that vloggers often develop a strong fan base. In terms of the star vloggers we concentrate on, we note that despite their success they tend to retain the low-rent format imposed on vloggers when starting out by time and cost considerations, possibly for reasons of brand continuity, to maintain relatability, or to stay within their comfort zone, genre-wise.

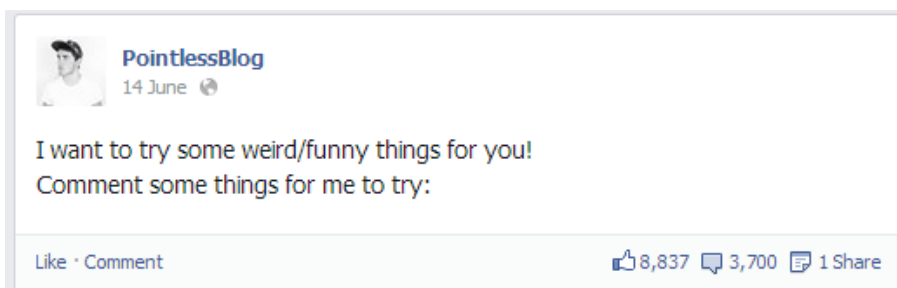
The three UK vloggers selected for this study, Zoella (Zoe Sugg), PointlessBlog (Alfie Deyes) and Marcus Butler TV (Marcus Butler), have been able to amass viewing numbers in the hundreds of millions as they speak directly to their mainly young teenage audience about topics of interest to their fans, in a way they can relate to. Sharing the same issues, fears and hopes, being fun and entertaining but also and most importantly being authentic are characteristics all three share.

All three of them are in their early twenties and started posting videos on YouTube several years ago. The themes they cover include how-to beauty and fashion advice (Zoella), and general and teenage topics (music, dancing, friendships, dating, challenges, and pranks). Also, a few more serious topics related to school, bullying or anxiety issues are addressed. This is done in a personal, relatable and funny fashion. Vlogs sound like a conversations you have with a friend, and viewers can respond by commenting on YouTube or interacting on any of the other social media site their favourite vlogger uses.

This kind of 'audience participation' distinguishes these services from television shows serving comparable content. Vloggers will often ask for feedback from viewers in comment form on their videos, and refer to what their viewers are saying. Sometimes they will ask their fans directly for ideas for videos. This creates a sense of participation and intimacy amongst their followers, which is key to their appeal. Many viewers follow the private lives of their favourite vloggers closely, who in turn share details of their lives through their videos and on social platforms.

⁶ E.g. *All That* and the *Amanda Show* on Nickelodeon; *Express Yourself* on the Disney Channel

Crowdsourcing video ideas from PointlessBlog



[Source: Facebook/PointlessBlog]

Each of the vloggers we look at have a second channel, where they present videos outside of the more structured to-camera vlog posts, providing an even more intimate view of their day-to-day lives, thereby strengthening their relationship with their viewers. Examples include “Harry Potter Fun Day With My Chummy” from MoreZoella, “Sexy German Hat Shopping!” from PointlessBlogTV, and “My New Hair” from MoreMarcus.

Selected UK vloggers

Vlogger	Zoella Zoe Sugg	PointlessBlog Alfie Deyes	Marcus Butler TV Marcus Butler
Genre	Beauty & fashion, teenage topics & advice	Comedy, teenage topics & advice	Comedy, teenage topics & advice
Founded	2007 (Zoella) 2012 (MoreZoella)	2009 (PointlessBlog) 2010 (PointlessBlogTV)	2010 (Marcus Butler) 2011 (MoreMarcus)
Twitter	2 million followers	1.4 million followers	1.5 million followers
Instagram	2.6 million followers	1.45 million followers	1.3 million followers
Facebook	1.4 million likes	930,000 likes	940,000 likes
Blog	6,800 visits/month	-	250,000 visits/month
Age	24	20	22

[Source: YouTube, Gleam Futures]

Contribution to Public Service Objectives

The vloggers covered can be seen to help fulfil PSO7, PSO1 and PSO3.

PSO7 – Children and young people

The content of star vloggers like those featured in this study helps to fulfil PSO7 as the material provided is original and primarily aimed at children and young people.

PointlessBlog “Back To School Advice”: In this video, Alfie answers questions and gives tips on various topics related to going back to school or college. This video is a good example of how interactive vlogs can be, as Alfie asked prior to filming the video for questions to be posted on his Facebook page regarding what aspects his viewers struggled with when going back to school, as well as funny stories they wanted to share. He received thousands of messages, and addresses five of the biggest topics in his video by drawing on his own personal experience as well as giving general advice to viewers. Topics include bullying, relationships, and

homework. All these are relevant to teenagers and they are addressed in an entertaining and honest way.

Young people's content from PointlessBlog



[Source: YouTube/PointlessBlog]

Zoella "Anxiety Q&A": In this video, Zoe talks about anxiety and answers questions posed to her by her fans. The video is a mixture of personal experience and recommendations on how to cope with certain situations. It also provides some high level explanation of anxiety disorder in combination with listing links for further reading in the comment section. (This video is discussed in more detail in the sample section below.)

Marcus Butler "I DON'T WANT TO GROW UP": In this video, Marcus talks about moving out of his parents' house and becoming an adult. While he says that he is excited about this step, the video highlights the issues and fears he has which are associated with growing up and becoming more responsible. While portrayed in a funny manner, through sketches for each of the topics covered (emptying the dishwasher, having to pay bills and taking care of important documents, dropping food on the floor and cleaning up), the video gives the message that while those things related to growing up are scary, they are important and should be done. He finishes the video by saying that he hopes he is not the only one who feels this way, asking his fans to post their views and comments. Not only does this video cover issues all teenagers are affected by, it does so in a light-hearted and jokey way, while also giving a positive message to teenagers to be more responsible.

PSO₁ – Cultural activity

Some of vloggers' output consists of original comedy, delivered to camera:

Marcus Butler "What not to say on a first date": This video is just one example of many that cover a topic that is very relevant to teenagers: being successful in relationships. Followed by a narrated introduction, all the things one should not do on a first date are shown in the form of a sketch, performed by Marcus sitting at a dinner table, ranging from inappropriate things to say to rude behaviour geared at a teenage audience.

Zoella "British Slang With Joey Graceffa": In this video, Zoella asks American vlogger Joey Graceffa about the meaning of different expressions she describes as British slang. The video reflects elements of how young people communicate in the UK in a fun and entertaining way.

Comedy from Zoella



[Source: YouTube/Zoella]

PSO₃ – Sports and leisure

Zoella "Fresh, Spring Makeup Tutorial": In this video, Zoella walks her viewers through what makeup she is wearing at the time, and the process of applying it, as a response to the interest viewers expressed in her makeup. The presentation is conversational and amusing, and the video is as much about entertainment as it is about makeup advice. This tutorial and many of her other videos address fashion and beauty topics, which are a central leisure interest for teenage girls in the UK and around the world.

Sample content

Zoella's "Anxiety Q&A" vlog

Zoella's video "Anxiety Q&A" was published on 15 June 2014. As of September 2014 it has received 2 million views. Its length is 22:52 minutes.

Anxiety Q&A by Zoella

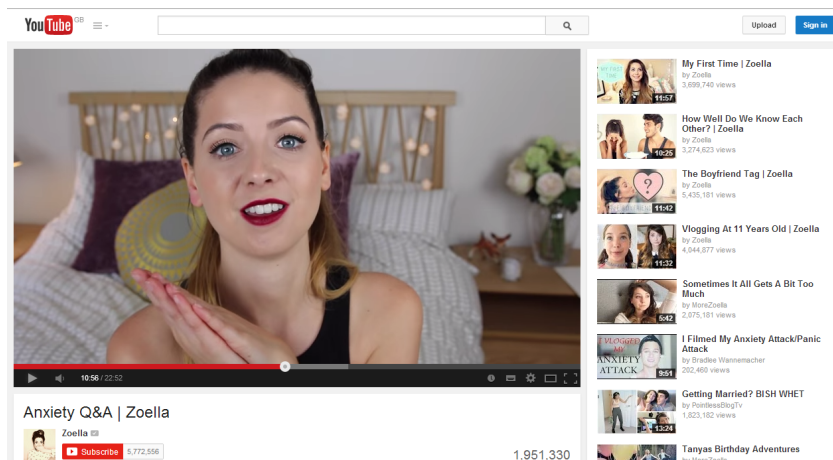


[Source: YouTube/Zoella]

This video is a follow-up to a previous one Zoella posted ("Dealing with Panic Attacks & Anxiety", 7 November 2012, 2.5 million views), based on a blog post about anxiety attacks that received a lot of feedback from her fans. As she continued to receive messages from viewers on this topic, she posted another video about it, in which she talks about anxiety in an open and personal way.

The main aspects covered in the video are descriptions of the experiences Zoella had with anxiety since she was 14, recommendations on how to calm yourself down, how anxiety affects her, tips related to anxiety and flying, how to cope with being judged when anxious and being too scared to talk about anxiety or depression to someone else. She also addresses anxiety disorder as a medical condition and provides links to relevant resources beneath the video. Finally, she encourages viewers to leave comments and engage with and help other viewers who struggle with similar issues – in their "community", as she calls it.

Zoella talking about anxiety related to flying



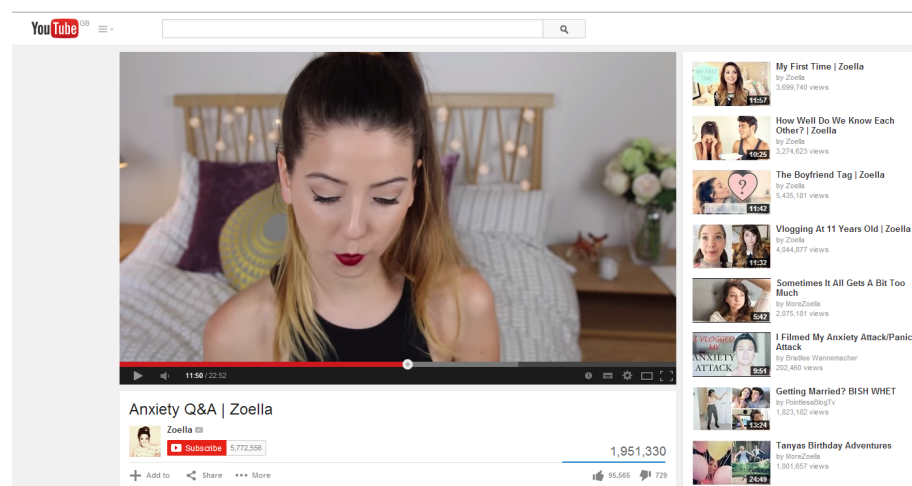
[Source: YouTube/Zoella]

This video is a good example of some of the key elements that distinguish vlogs from linear TV content:

- Setting – filmed in the bedroom
- Style – direct narration to the camera
- Interactivity – the usual commenting culture, but also a Twitter hashtag to ask questions (#zoellaanxiety)
- Immediacy – the fact that she is sharing her own experiences about a highly personal subject
- Community among viewers and with the vlogger – the video is structured more like a conversation than like a one-way broadcast, and discussion among viewers is encouraged

A key element of success is that viewers can identify with and relate to vloggers, which often creates a very strong fan base among viewers and explains high levels of viewership and consumption.

Zoella reading out viewer questions



[Source: YouTube/Zoella]

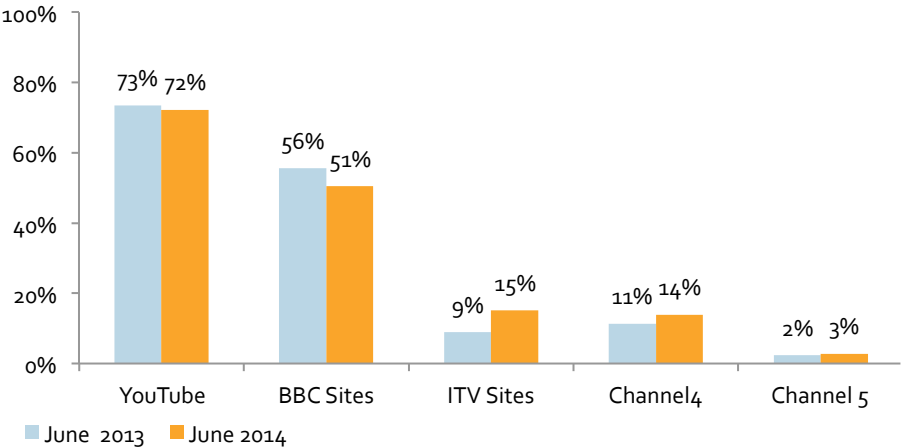
Audience reach and profile

YouTube is available across a wide range of devices, from PC and mobile devices (smartphones, tablets) to smart TVs and game consoles. Some successful vloggers have their own websites, apps, Facebook pages and Twitter accounts.

As a result, accurately tracking audience reach for individual vloggers, as well as vloggers as a category is difficult. Overall, YouTube reaches more internet users than any of the public service broadcasters, including the BBC, with more than three quarters of the online audience logging on at least once a month.

Among younger internet users, YouTube's pull is even greater, reaching three quarters of all under 25s online, versus 50% for the BBC (across all sites), and 15%, 14% and 3% for ITV, Channel 4 and Channel 5 respectively. Use is even more skewed in YouTube's favour; according to comScore, the online video site accounts for 16% of all time spent online by under-25s compared to just 3% for all four public service broadcasters (the vast majority to the BBC). This makes YouTube an ideal platform to reach the young audience targeted by most vloggers.

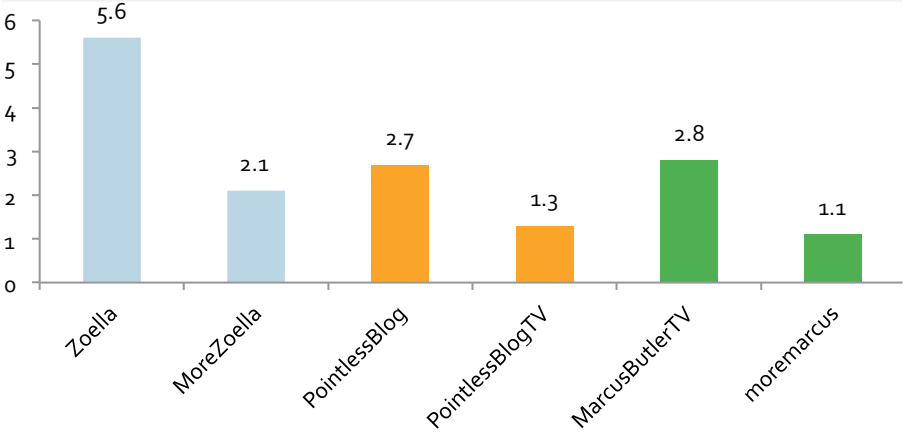
Audience reach amongst under-25 internet users (%)



PC, mobile and tablet users [Source: comScore MMX]

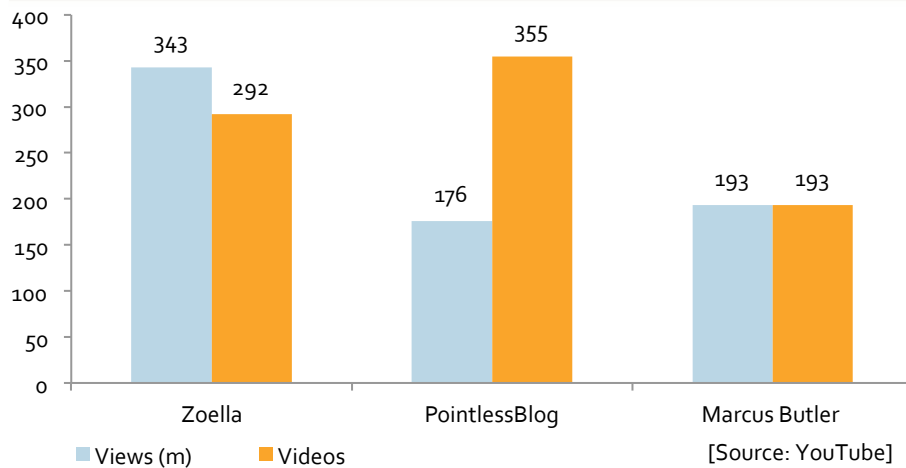
An indication of the audiences of specific vloggers can be obtained through the publicly available data on their YouTube channels and videos:

Subscribers to channels of top vloggers, August 2014 (m)



[Source: YouTube]

Output and consumption across all channels, August 2014



Zoella’s main channel has 5.6 million subscribers as of August 2014. The median video by views (currently “Primark Haul and Giveaway”) has had 1.3 million views and 37,000 comments, and the URL has been shared 900 times to Twitter and 400 times to Facebook.⁷ The most popular video by views (“How To: My Quick and Easy Hairstyles”) has had 6.7 million views, 14,000 comments and 2,400 total shares to Facebook and Twitter.

PointlessBlog’s main channel has 2.7 million subscribers. The median video by views on this channel is currently “Whipped Cream Challenge”, and has 500,000 views and 1,000 comments, and has been shared to 300 times to Facebook and Twitter each. The most popular video (“Ariana Grande Does My Makeup”) has 4.9 million views and 19,000 comments, with 4,500 combined shares to Facebook and Twitter.

Marcus Butler’s main channel has 2.8 million subscribers. The median video by views is “What not to do at the Airport”, and it has 800k views, 4,000 comments, 350 shares to Facebook and 900 shares to Twitter. The most popular video is “Singing With Helium”, featuring American vlogger Tyler Oakley, and has 4.2 million views, 18,000 comments and 12,000 shares to Facebook and Twitter.

These are all global numbers: a UK-specific breakdown is not available. They do give an idea of the scale of the most successful UK vloggers: the average Zoella video has a watch-count higher than the circulation of any entertainment magazine in the UK, and her most popular videos have prime-time television levels of views. These are somewhat misleading comparisons, as there is relatively little data on the distribution of consumption of vlogger output. It is at least plausible that there are some very heavy consumers, who each account for multiple views of every video, something that does not happen with live broadcast. However, vloggers are clearly not a niche phenomenon.

Business model and revenue

With their increasing success, revenue opportunities for vloggers have multiplied. With the help of YouTube’s partner programme, which was launched in 2007,

⁷ Note: Facebook shares are from Facebook Graph, and only count initial shares to Facebook, not resharing *within* Facebook.

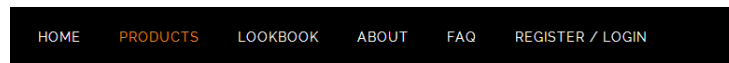
those creating popular content can monetise it by letting YouTube place advertising next to it. Revenues are shared between YouTube and the creator at a 45/55 rate. This was the first revenue stream successful vloggers could use, since then the opportunities have increased considerably.

As their success grew, many vloggers have joined multi-channel networks (MCNs), which can help with increasing traffic to their channel, improving production quality and advertising revenue, arranging sponsorship deals or brand integrations between creators and brands, merchandising, book deals, producing new formats, and developing websites or apps. In exchange, MCNs take a revenue share, which is usually around 70% for the creator and 30% for the MCN. Brand integrations and sponsorships can be very lucrative as production costs are generally comparatively low, as they are often shot at home and with regular consumer equipment.

In addition to being part of an MCN, star vloggers like the three in this study, are also signed with a talent agency. Zoe Sugg is part of the Stylehaul MCN and represented by Gleam Futures. Talent agencies offer the usual services, such as fan meet-ups, appearances or other commercial engagements like branded content or endorsements in exchange for a share 30% of associated revenue.

As well as sponsorship and advertising, vloggers can monetise their output through physical products. This can range from items of clothing to entire product ranges (beauty vloggers Pixiwoo have their own brand of make-up brush).⁸ We also see the ways in which vloggers might leverage their brands in the fact that Zoella is writing fiction to be published by Penguin.⁹ These approaches to monetisation are not new, but they highlight the fact that these are bona fide celebrities in their own rights, whose names are able to sell products.

Marcus Butler merchandise



PRODUCTS



Source: marcusbutlershop.com]

⁸ <http://realtechniques.com/>

⁹ <http://www.telegraph.co.uk/lifestyle/11031778/Zoella-Tanya-Burr-and-the-UKs-YouTube-superstars.html>

It is estimated that top vloggers can make up to seven figures per year. Probably the most famous example is PewDiePie, who uploads commentaries whilst playing video games (not strictly a vlogger), who has 30 million YouTube subscribers and is estimated to make upwards of \$7 million per annum from advertising alone.¹⁰

With increasing professionalisation and related changes to the content posted, one of the biggest dangers is that these changes affect the relationship between vlogger and fan. With all parties being well aware of this, vloggers such as Marcus Butler talk to their fans about these changes and asks them about feedback to make sure that their connection is not lost. Authenticity and relatability remain key elements in a vlogger's success.

Summary

Popular UK vloggers produce videos for young people, which are often humorous and deal with everyday issues. They have reached huge scale in terms of audiences, but maintain the intimacy and relatability that made their output popular in the first place. Despite this, their approach to content creation and monetisation is similar to that found in traditional media. Creating an intensely loyal audience, such vloggers are already providing much of the entertainment the young teens who follow them want, and there is no reason they could not draw even more of this audience away from traditional media.

¹⁰ <http://www.celebritynetworth.com/articles/celebrity/the-25-highest-earning-youtube-stars>

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