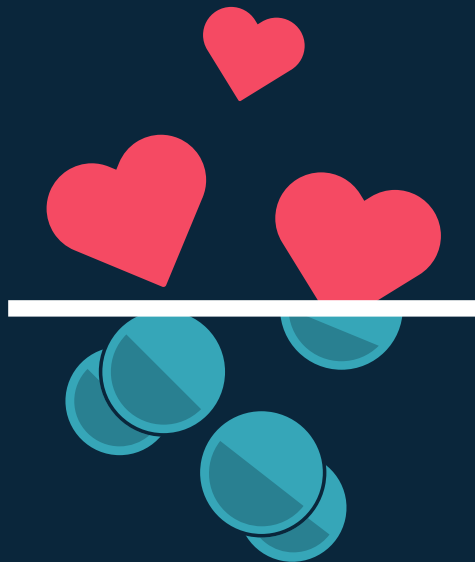


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REPORT

**MONETIZING
CREATIVITY: “HOW
CREATORS MAKE
AN IMPACT IN THE
DIGITAL WORLD”**

June 2023

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INTRODUCTION - AN AGE OF CREATORS: EMPOWERMENT AND TRANSFORMATION IN THE DIGITAL WORLD

The exponential growth of technology and digital platforms has unlocked an entirely new landscape for creative talent, enabling them to monetize their work by targeting global audiences that were previously unreachable. This latest issue of IDEAS LLYC explores the burgeoning creator economy.

Creators generate original content in the digital world, becoming a significant economic force. There are now an estimated 50 million content creators globally, and the economic value they generate is believed to be well over US\$109 billion. This value constitutes an industry comprising creators, platforms, and other agents and brands worldwide of advertising, e-commerce, and sponsorship. Indeed, with this new context in which the generation of genuine content is also a business opportunity, we are entering what is already known today as "the content creator economy" or "the age of creators."

These content producers influence and reach diverse communities, large and small, on almost any topic through various channels such as YouTube, Twitch, Instagram, TikTok, or Reddit. The growth of this industry has been driven, in part, by the digital platforms themselves, which foster the connection between creators and their audiences, drive interactions between the two, and facilitate real-time feedback.

Hoy existe un nuevo camino para aquellos que desean compartir con el mundo sus talentos, sus conocimientos o sus pasiones, un camino en el que además pueden generar ingresos a través de patrocinios, publicidad y ventas de productos.

There is now a new path for anyone looking to share their talents, knowledge, or passions with the world, a path in which they can also generate income through

sponsorship, advertising, and product sales. Let's explore the impact of this new era on the economy, culture, and society in general and analyze the emergence of content creators, their influence on consumer decision-making, the opportunities and challenges they face, and the long-term implications of this new digital revolution.

UNLOCKING THE POTENTIAL OF CREATORS: A STRATEGIC LEVER FOR COMPANIES

Understanding the phenomenon of creators becomes relevant in a context where the value of attention has skyrocketed due to constant disruption.

These new voices emerge from the need to transform messages into stories and audiovisual content that generate the necessary connection so as not to lose attention. When this challenge is identified, the industry evolves from talking about "influencers," where influence was classified according to the number of followers, to talking about "Content Creators," where impact is also defined by values of legitimacy, credibility, and naturalness, elements that companies often do not have organically. In this way, creators offer companies and brands the opportunity to connect with their communities.

**"Creators offer
companies and brands
the opportunity to
connect with their
communities
genuinely"**

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Here are just some of the opportunities facilitated by creators that organizations can harness as a strategic lever:

- **Connecting more authentically.** Content creators often establish solid and authentic connections with their followers. These relationships are based on the trust and credibility they have earned over time by providing valuable and relevant content. By partnering with content creators, companies can leverage this trust and credibility to strengthen the positive perception of their brand and products among the creator's audience.
- **Discovering new communities.** Content creators are not outsiders like our company can be, but just another member of the communities we want to join as a brand. They can help us reach communities we couldn't reach organically or through more traditional and corporate channels.
- **A more creative and innovative narrative.** Creators have the knowledge and experiences that connect with the community's purpose. Their way of presenting corporate stories, products, and services can help us work with more creative approaches that differentiate us in a saturated digital environment.
- **Engaging high-interest niche groups.** One of the most significant opportunities creators can deliver to brands is their reach to small but highly engaged groups interested in their shared causes.
- **Staying abreast of market trends and changes.** Content creators are always on top of the latest trends and changes in platforms, formats, and new ways to connect with followers. Collaborating with them as a brand will help us stay current and relevant.

These profiles help brands humanize their messages and communications, adopting the right tone for each platform and connecting with audiences and customers. Engaging with these profiles can certainly enable brands to position themselves and stand out within the digital landscape."

Monetizing creativity:
"How creators make an impact in the digital world"



AN APPROACH TO SOME RELEVANT MARKETS

MEXICO

A BOOM TO INFLUENCE SHOPPING

Mexico has an estimated 1.9 million content creators, representing a market estimated to be worth \$240 million. However, creators are gaining enormous influence in this market. Figures from last year suggest that 16% of Mexicans purchased a product influenced by content developed by a creator. This power of persuasion has caused brand spending in Mexico on this strategy to skyrocket from \$37.3 million in 2017 to an estimated \$240 million in 2023, with expectations of reaching \$364 million in 2027.

When choosing the channel to exert this influence, content creators primarily choose Meta platforms (Facebook and Instagram) in 60% of cases, followed by TikTok, which still has room for growth occupying only 10% of the market. The remaining platforms have smaller market shares that are below the double-digit threshold. Some of the most effective formats include posts and stories on Instagram.

“Becoming a content creator presents an opportunity for profiles such as music or television stars. They can utilize these platforms as powerful promotional spaces for their new creations”

A MELTING POT OF EMERGING AND ‘LIFELONG’ TALENTS

While it is difficult to find topics content creators still need to cover, the Mexican market is mainly dominated by fashion, beauty, travel, music, and personal and family life. In these areas, creators have found a more precise point of connection and empathy with their communities.

Furthermore, becoming a content creator presents an opportunity for profiles such as music or television stars. They can utilize these platforms as powerful promotional spaces for their new creations. Similarly, athletes can leverage these spaces and their popularity to generate unique content and showcase new qualities that resonate well with new audiences.

Moreover, our digital age is not exclusive to younger generations or the most disruptive industry profiles. Even profiles such as journalists and more “traditional” Key Opinion Leaders (KOLs) have adapted, either out of audacity or necessity, to the new trends in how Mexicans consume content.

SPAIN

SWITCH TO TWITCH AND RETURN TO YOUTUBE: THE PLATFORM STRUGGLE

According to Adobe, Spain is the European country where the creator economy has experienced the most significant growth in the past two years.

In the era of ‘Content Creators’, brands’ pursuit of relevance is not the only challenge where these creators play a crucial role. Another important aspect, especially in the Spanish market, involves platforms constantly adapting their offerings to make them as appealing as possible to content creators.

Going from Twitch to YouTube may seem unthinkable. However, as explained by Blanca Formáriz, Managing Director of 2btube Spain, many Twitch content creators are transitioning back to YouTube. This shift is because YouTube offers a much more appealing monetization system for creators. YouTube has strategically played its cards in this regard. With the introduction of YouTube Shorts, a format native to TikTok, the platform initially faced some resistance as it was not well-received. Nonetheless, YouTube recognized an opportunity to create an enticing monetization proposal to attract content creators, and they succeeded. Content creators receive 45% of the revenue from the YouTube Shorts format, which is not the case on other platforms like Facebook, TikTok, or Instagram.

MONETIZATION: MORE ACCESSIBLE AND ‘STABLE’

However, YouTube is one of many platforms with an attractive monetization system for content creators. OnlyFans also serves as an exciting platform for this digital profile. While it was born within a particular niche, this platform has gained ground with different content types, including fitness routines and recipes. This emergence comes from its monetization model: subscription. This has proven to be a surefire way to create content and ensure a specific monthly income that, unlike Tik Tok, where a poorly performing range means a lower monthly payment, does not depend on the number of views.

Twitch is another emerging platform currently moving in this direction. This network has boldly adopted a flat rate incentive program: If creators broadcast live for at least 40 hours per month and introduce advertising minutes every hour, they can receive an incentive of between US\$500 and US\$1,000 per month. In addition, last year, the network cut the €100 minimum payment threshold in half, making the monetization of content creation more accessible to creator profiles.

However, YouTube is one of many platforms offering an attractive monetization system for content creators. OnlyFans has also emerged as an intriguing platform for this digital profile. While it initially started within a specific niche, it has expanded to encompass various types of content, including fitness routines and recipes. The key to its popularity lies in its subscription-based monetization model. This model ensures a consistent monthly income for creators, unlike TikTok, where lower-performing content translates to a decrease in the monthly payment, as it does not rely on the number of views.

Twitch is another platform making strides in this direction. It has boldly implemented a flat-rate incentive program: creators who Livestream for a minimum of 40 hours per month and incorporate advertising minutes every hour can receive incentives ranging from \$500 to \$1,000 per month. Moreover, last year the platform cut the €100 minimum payment threshold in half, making the monetization of content creation more accessible to creator profiles.

THE DIVERSITY OF MONETIZATION MODELS

Platforms are increasingly enabling monetization models, making them more versatile and adaptable to the needs of individual creators. This is so they can differentiate themselves from the considerable proposal of channels that ‘Content Creators can use to publish their content.

TWITCH: THE MORE OPTIONS, THE BETTER

The Twitch network has different monetization models, including subscription, donations, Bits and Cheers, advertising, affiliation, and partner programs. There is no doubt that Twitch is currently one of the platforms that offer creators the most monetization options.

MAMBY: BIDDING FOR THE BEST-PAID VIEW

Pay-per-view is another monetization model. TikTok, Instagram, and Facebook are some platforms that use this payment type. However, some smaller venues also aim to position themselves as the best platform for content creators.

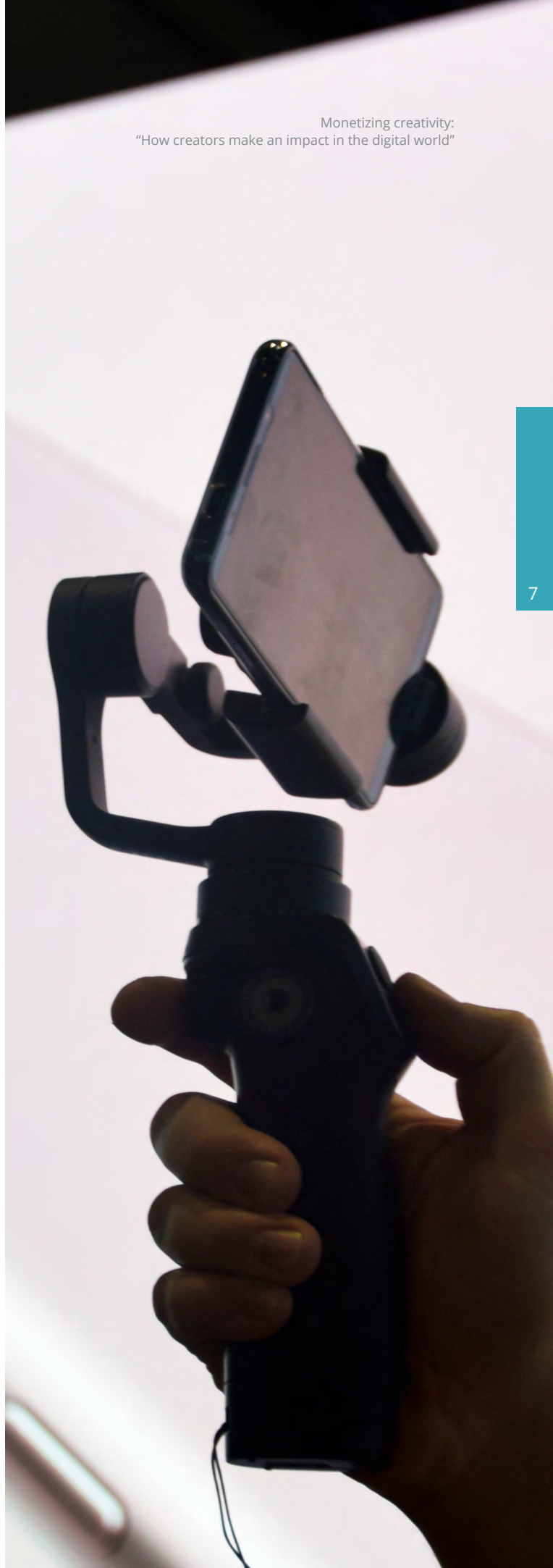
The Spanish startup Mamby, created in 2020 and launched to the public in 2022, is a Spanish social network that pays its users the most per visit received in 2023. On average, the Mamby platform delivers its creators €35 per 1,000 visits, 40 times more than YouTube.

EVEN AMAZON IS IN THE GUMBO

According to an article in Business Insider Spain, forty percent of the top Spanish streamers' revenue on Twitch over the past year has come from Prime subscriptions. This trend mirrors how the platform's leading Spanish content creators depend heavily on Amazon and its Prime program since if free subscriptions were to be withdrawn at some point, streamers would see almost half of what they earn month after month disappear.

A BUBBLE RARING TO BURST

The competition among creators and platforms will continue heating up in 2023 as the industry becomes more professional. There are also many indicators already suggesting that this is an increasingly mature phenomenon in Spain: the emergence of 2bpay, Spain's first financial app for content creators; Capacitaciones Village in La Rioja, a village for content creators; the Spanish National Markets and Competition Commission (CNMC) is proposing to have content creators register in the Registry of Service Providers, just to name a few. It will therefore be exciting to see how platforms will adapt their business model to capitalize on the most significant number of content creators.



BRAZIL

AN UNSTRUCTURED INDUSTRY IMPACTING REVENUES

Brazil's influencer and content creator industry has experienced significant growth in recent years, with the digital influencer market generating 10 billion reais in 2020, marking a 62% increase compared to 2019, according to the Influencer Marketing 2021 study. This growth is particularly notable in the fashion, beauty, design, and music sectors.

However, the surge in the number of creators in Brazil presents opportunities and challenges. With everyone aspiring to become an influencer, there has been a fragmentation of income, resulting in reduced salaries for individual creators. One of the primary challenges creators face in monetizing their influence is the lack of standardization in the market, which is still in the developmental stage.

To address these issues, Brazil's Institute for Applied Economic Research (IPEA, 2022) emphasizes the importance of clarifying and strengthening intellectual property and copyright protection policies. These measures are crucial for creators to effectively monetize their creations and protect their rights in the industry. As the influencer and content creator industry continues to evolve and mature in Brazil, it is essential to establish industry standards, regulations, and protections that facilitate fair monetization and provide creators with the necessary support to thrive in their profession.

WHERE THERE IS ACCESSIBILITY, INFLUENCE FOLLOWS

The growth of content creators has led to new platforms and increased investment in technologies and services to support them. However, several challenges still exist, particularly in areas with limited internet access. According to the Brazilian Institute of Geography and Statistics (IBGE, 2022), limited internet access in certain regions hinders creators' ability to reach a broader audience and monetize their work.

Despite these challenges, Brazilian digital brands that focus on areas with better accessibility are capitalizing on the potential of e-commerce. Over 40% of Brazilians with internet access and digital platform users now purchase products creators recommend. The popularity of TikTok has also grown significantly in Brazil, with the platform reaching one in three Brazilians per month. Additionally, e-commerce giant Shopee from Singapore has entered the market and competes with local players like B2W and Magalu regarding app downloads.

These developments indicate the growing influence and impact of content creators in Brazil, even with the existing limitations of internet access. As technology and infrastructure continue to improve, it is expected that more Brazilians will have access to digital platforms, further expanding the reach and opportunities for content creators in the country.

UNITED STATES

WHEN CULTURAL NICHE BECOME MAINSTREAM

US content creators are increasingly finding success by focusing on specific interests and catering to smaller, niche audiences. This shift marks a significant move away from the era of mass appeal and reflects the growing demand for authentic and specialized experiences in entertainment and online content.

The conventional traditional media landscape favored mainstream appeal, with content producers striving to reach the broadest possible audience. However, this approach often resulted in a monolithic, one-size-fits-all uniform product that failed to capture people's unique preferences and interests. The surge in niche culture is disrupting this model today, allowing content creators to explore their passions and connect with highly engaged communities that share their interests. This trend raises a serious question: does integrating specialized cultures represent a healthy development or a potential danger?

The social networking landscape has undergone a significant transformation in today's society. More and more people are moving away from popular platforms like Facebook and Instagram and instead gravitating towards niche networks that allow them to connect with specific communities of like-minded people. This change can be attributed to several factors, including the algorithmic nature of content discovery, which no longer relies solely on a user's circle of friends. The declining trust in mainstream media has also led people to seek authenticity and relatability through microcontent creators.

WHAT ROLE DO MICROCONTENT CREATORS PLAY FOR BRANDS?

The decline in trust can be attributed to various concerns, including polarization, fake news, and privacy, which have decreased social media users' confidence. According to the 2022 Edelman Trust Barometer, the trust index of the general US population was rated at 43 out of 100, indicating a 10-point decline since 2017 and a five-point decrease compared to the 2012 index. Spain had a slightly higher score at 45, followed by Brazil at 51, and Mexico leading the way with a score of 59.

Specifically within the United States, this decline in trust has resulted in a growing number of social media users reducing or even discontinuing their usage of major platforms. For example, the percentage of people using Facebook dropped from 27.5% in 2021 to 18.3%. YouTube usage decreased from 41.6% to 33.7%, and LinkedIn declined from 26.1% to 19.2% (Ahmed, 2022).

As a result, individuals are turning towards smaller, community-driven platforms where they can find genuine and trusted connections. These platforms provide a sense of belonging and shared values, creating a more intimate and meaningful user experience. The integration of niche culture within these platforms benefits individuals seeking more authentic connections and opens doors for microcontent creators and subcultures. Previously, these creators may have struggled to reach a wider audience due to their niche interests or unconventional content. However, as niche culture gains traction in the mainstream, these creators now have the opportunity to connect with larger audiences that appreciate and engage with their unique perspectives.



Furthermore, the fusion of niche culture and mainstream media has the potential to foster creativity and innovation. When different subcultures intersect, they bring diverse perspectives and ideas that can challenge the status quo and inspire new trends. This cross-pollination of ideas can lead to the emergence of new cultural movements and the revitalization of existing ones.

However, it is essential to be mindful of the potential downsides of integrating niche culture. As a subculture becomes more mainstream, there is a risk that its uniqueness and authenticity may be diluted or commoditized for mass consumption. It is crucial to ensure that as niche culture gains popularity, its values and principles remain intact to avoid losing its original charm and appeal.

In conclusion, incorporating niche culture in the United States allows individuals, communities, and microcontent creators to foster more authentic connections, stimulate creativity and innovation, and provide exposure to previously marginalized subcultures.

However, it is vital to strike a balance and preserve the integrity and essence of niche culture as it becomes more mainstream. We can cultivate a more diverse, inclusive, and vibrant society by embracing niche culture while respecting its roots.

GROWTH ENHANCERS

Looking at the reasons behind its exponential growth in recent years, a key driving force behind the rise of niche culture is the democratization of content creation, driven primarily by Gen Z through their choice of social media platforms. The accessibility of technology has lowered the barriers to entry, allowing anyone with a creative spark and an Internet connection to become a content creator.

One example worth noting is YouTuber Bhuvan Bam, known for his BB Ki Vines channel. What began as simple videos of everyday life recorded with a phone camera is now a 26.2 million-subscriber family chronicle channel with its own production house and a web show called Dhindhora, which launched on October 14, 2021.

This newfound ability for people with niche interests to find representation and connect with like-minded individuals on an unprecedented scale is genuinely remarkable. Whether it's obscure hobbies, specialized knowledge, or unconventional art forms, content creators now have the opportunity to carve out their own unique spaces in the vast digital landscape.

Moreover, the rise of niche culture reflects a fundamental shift in consumer preferences. In an era characterized by overwhelming information and content, audiences are becoming increasingly discerning. They crave content that aligns with their identities, challenges their perspectives, and provides a sense of belonging. Mainstream content often fails to meet these desires, leading audiences to seek out niche creators who offer a more personalized and tailored experience. This trend is further fueled by algorithms and recommender systems that excel at connecting consumers with niche content that resonates with their interests, thus nurturing thriving communities of specialized enthusiasts. Acknowledging that platforms have multiple objectives, including generating advertising revenue, ensuring user satisfaction and retention, and even fostering civic engagement, is essential.

“This newfound ability for people with niche interests to find representation and connect with like-minded individuals on an unprecedented scale is genuinely remarkable”

In this context, similar to YouTube, TikTok has significantly transformed the interaction between digital creators and consumers. As a prominent social media platform, TikTok utilizes data mining for targeted ads, exemplifying the broader goals of its algorithms that go beyond catering solely to individual user preferences.

However, these broader objectives may not be as useful when it comes to specific algorithmic decisions about which content to show to a particular user at a given time. Establishing a clear connection between these micro-level decisions and their long-term impacts remains challenging.

ENGAGEMENT VS MAINSTREAM

The concept of engagement is crucial in this context. It holds significant value as algorithms consider user comments and interactions with each post in their feed. The algorithm’s goal, in most cases, is to prioritize content that is more likely to elicit user engagement in social media platforms. In summary, we are witnessing a growing phenomenon of democratizing creativity while fostering more authentic connections.

This phenomenon has allowed previously marginalized subcultures to emerge through technology access. It is driven and empowered by consumers who increasingly prefer online platforms and user-generated content over traditional media. This shift has led to rising demand for original and authentic content, contributing to the emergence of this new economy. According to Goldman Sachs., this economy is projected to reach \$480 trillion by 2027.

“We are witnessing a growing phenomenon of democratizing creativity while fostering more authentic connections”



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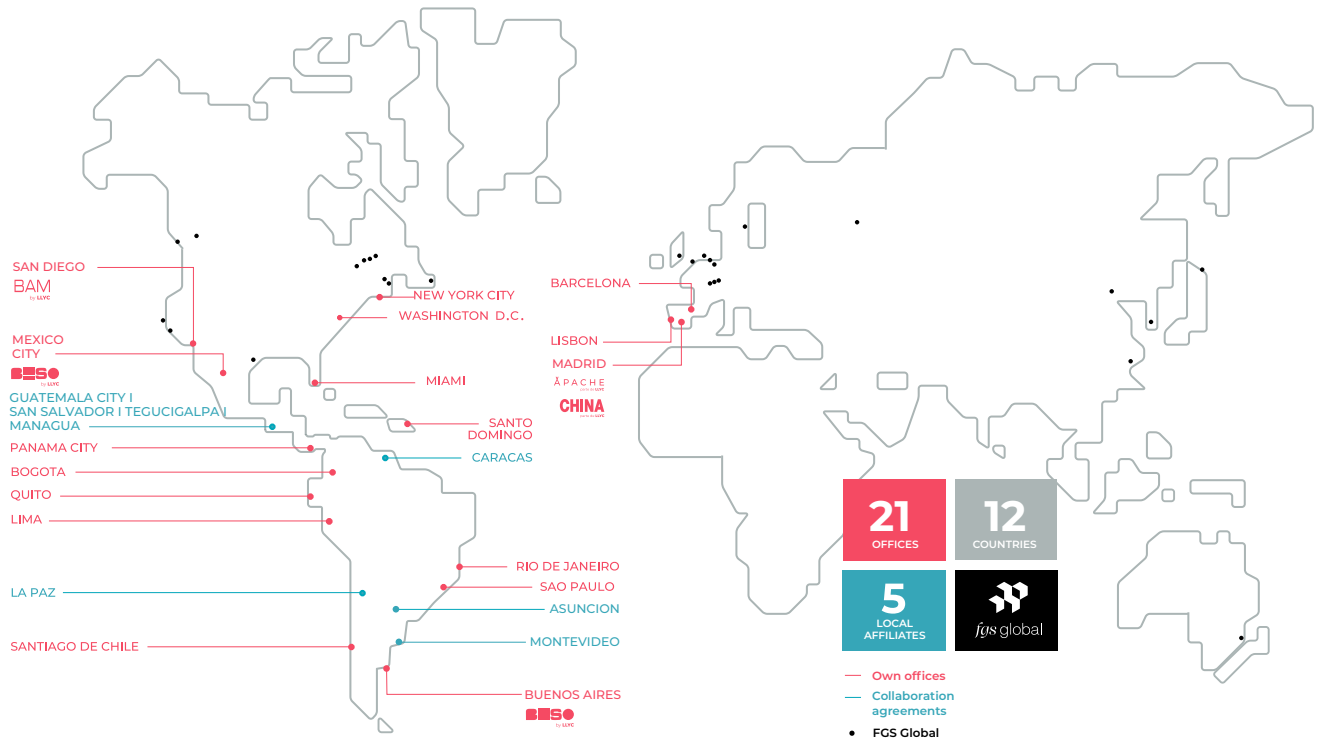
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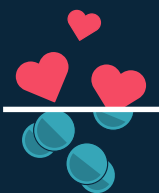
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