



Reaching the Unreachables

Media is always evolving.
Today's audiences have shifted their
attention and trust away from publishers
and platforms towards people.



Intro to Reaching the Unreachables

Audiences today have untethered themselves from major media companies and are finding content they love in new places — and on their own terms. More than half of Gen Zs and millennials **spend zero hours on ad-supported TV** on any given day. In fact, they actively dislike ads and are willing to pay to avoid them.

At the same time, they are turning to content from “creators”: comedians, independent chefs, writers, designers, musicians, dancers, and filmmakers. Whether this content lives on Instagram, Meta, Snap, TikTok, Twitch, Twitter, or YouTube makes little difference. Creators are taking a growing share of time and attention away from traditional content providers.

WHY?

- Traditional advertising often makes people feel they're missing something, while creators make people feel good.
- They create content that people truly enjoy.
- They represent communities that make people feel like they belong, rather than aspiring to some idealized world.
- Audiences trust creators and welcome their recommendations.

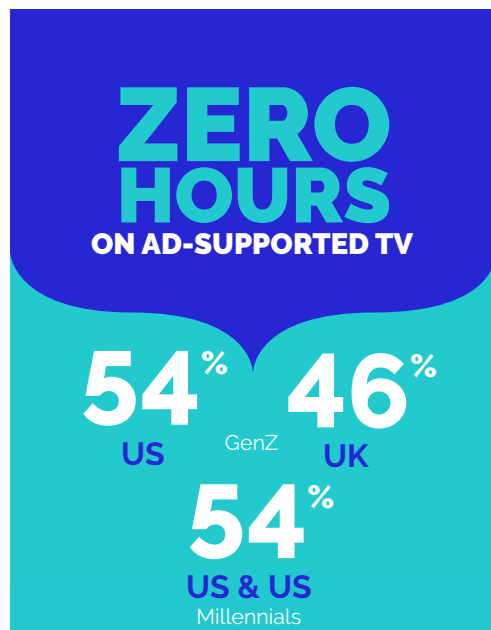
For marketers and brands, these developments require a new approach to media and marketing. They must be in these communities, because that's where the audience is, but they need to do it the right way.



The AD-NEVER generation

Our research revealed that consumers today are going straight to the content they want— whether it comes from mainstream publishers or niche creators —and experiencing it à la carte across different games, platforms, and channels. They're using millions of individual sources to create their own programming and design their experiences the way they want.

In doing this, they are actively avoiding ads. Whether that's through ad blockers or paid content, they have little tolerance for traditional brand communications.



They have gone from **cord-cutters to cord-nevers** and from **ad-avoiders to ad-nevers**.

Belonging to communities

Young consumers are also undergoing a sea change in their social media behavior. Where they **used to curate perfect versions** of their lives online, they now largely prefer being themselves and making real friends based on shared interests. They are seeking privacy, safety, and a break from mainstream social media platforms that are now so popular that their parents (to their horror) are on them too.

In doing so, they are finding their own places in **private digital communities** that are centered around shared passions. Some are broadly popular, such as travel, music, and fashion. But there are also “communities of influence” dedicated to an infinite range of topics; movie genres, marginalized identities, fintech, van life, elf core, modest families, cowboys of color, specific health issues, and many more.



APPS FOR THE REAL WORLD

Photo-sharing apps BeReal, LiveIn, and Locket reflect young consumers' changing tastes for authenticity in different ways. BeReal emphasizes spontaneity. Unlike on traditional social media platforms, users don't get to choose when they post in the app. Instead, they get an alert that tells them to take a photo now, and so they share the banal and ordinary along with the amazing. BeReal currently has 5 million total downloads, 65% of which are from this year alone.

LiveIn and Locket are photo sharing widgets that enable users to take photos and have them appear in tiny boxes on their friends' home screens. Each is designed primarily for messaging a small group rather than broadcasting to the entire world. For example, Locket only allows you to connect with only five friends at a time, while LiveIn is popular among couples. They both market themselves as tools for communicating with your “real” friends, a pointed swipe at the expansive use of the term on other social media platforms.

How creators make people feel good

Traditional advertising has often come under fire for creating unrealistic expectations in its audience. Perfect bodies, perfect faces, and perfect lives have made their audiences feel inadequate, unfulfilled, or missing out.

The communities that creators represent are different. Based on a sense of positivity and belonging, **they make people feel good about themselves.** They embrace underrepresented groups, body positivity, improved mental outlooks, and the simple fact that being different is okay. And their content is entertaining, too: fun, funny, and uplifting at the same time.

70%
US

creators and influencers create content that they enjoy watching again and again

58%
UK

63%
US

trust content from individuals as much or more than content from big news and media organizations

58%
UK

61%
US

say creators and influencers tell the best stories

52%
UK



Creators and loyalty

This shared sense of positivity is also driving impressive loyalty among the unreachable. While Gen Zs are just developing an affinity for brands (some don't yet have the income to fully participate in consumer culture across a wide variety of categories), many are already loyal to their favorite content creators.

More than
1/3

Zs online time spent
consuming creator content

70% **58%**
US UK

really enjoy and feel loyal to creators

63% **58%**
US UK

trust the product recommendations
of content creators

61% **52%**
US UK

purchase products they've seen demonstrated
or discussed by content creators

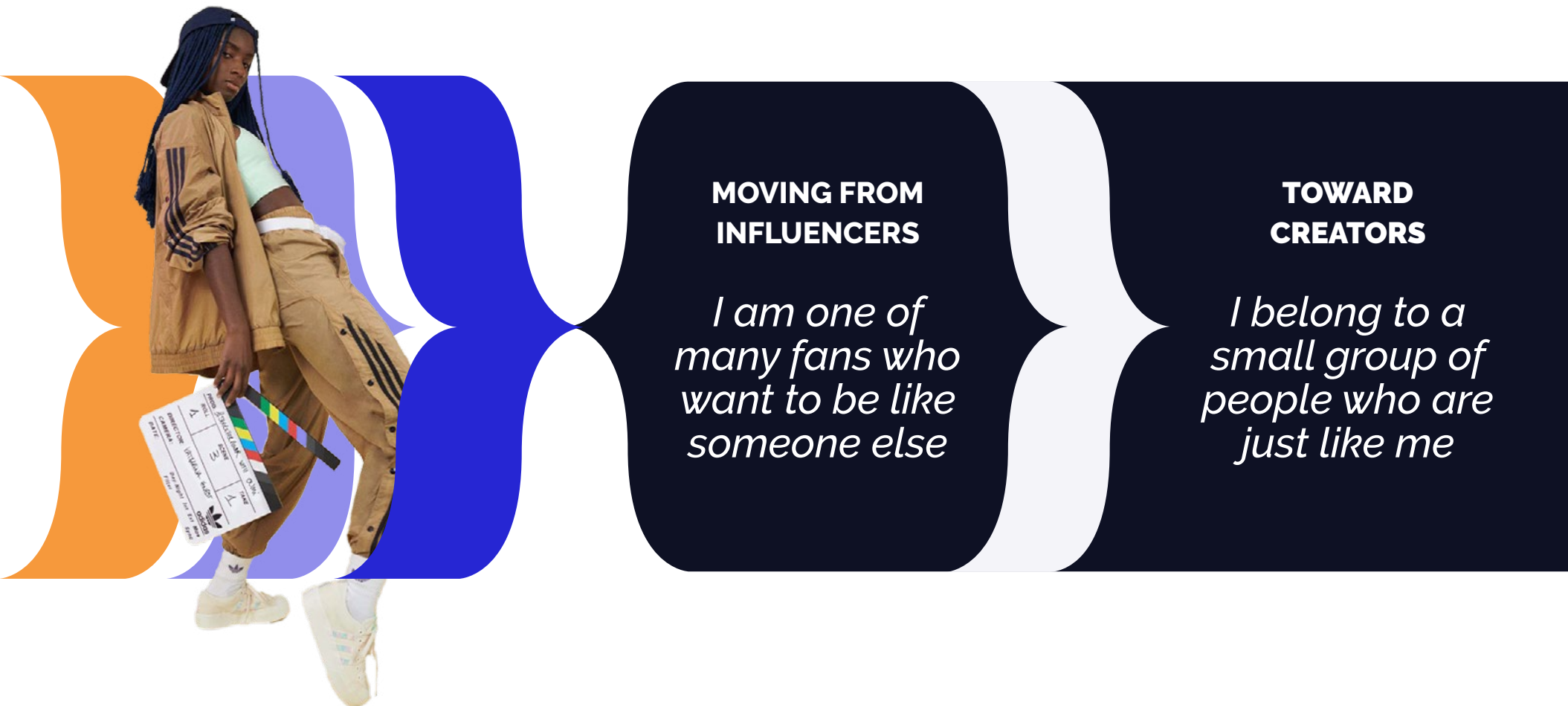
Simply put, these consumers are not only having a good time watching creator content, but they are also **much more loyal** and more likely to buy as a result of recommendations.




From aspiration to belonging

Belonging is a key feature of this new community culture, in which people are finding value in online spaces that offer true accountability, relatability, verifiable talent — and in many cases, honest self-expression.

People in communities connect with others like themselves through shared identities, experiences, and perspectives. They learn, grow, and find support in these spaces, and they **enjoy belonging to a movement** that's bigger than themselves.



Communities fuel brand discovery



A sense of belonging translates into a deep sense of trust, which makes communities the critical place for brands to reach a younger audience today.

Young people today feel connected to people in their communities, and they rely on them when it comes to decisions and purchases, including brand and product recommendations.

64% **59%**
US UK

feel connected to other people who like the same content creators they like, even though they don't know them in real life.

Communities fuel brand discovery

Rather than buying into the authority of traditional gatekeepers, like movie studios, fashion editors, and mainstream celebrities, community members are **looking to each other** to discover new brands and products. They are abandoning the unapologetic, mass commercialism of influencers like the Kardashians in favor of the trust, intimacy, and sense of belonging that comes with creators and their communities.



Above all, young consumers trust recommendations from their communities. Because they have a shared understanding of their needs and desires, they have faith in their fellow members to give honest assessments of how a product, service, or brand performs.

Brands as a tool of identity creation

For all their general skepticism of brands, millennials and Zs can be inspired by them to shape their identities. They may not be the only generation that has expressed themselves through the brands they buy, **but the dynamics of where and how they do this and the exact meaning they create in their communities is something new.**

EXPRESSION

71% **65%**
US UK

express themselves through the products they buy, clothes they wear

REPRESENTATION

64% **59%**
US UK

buy products that represent and communicate who they are

DISCOVERY

66% **61%**
US UK

enjoy learning about new products that might suit them

Try as they might, brands can't control what they mean to consumers. Instead, meaning is created by consumers in the communities they belong to, and by creators who can facilitate introductions to new brands and products.



Invitation only: brands must be invited

Communities are critically important but also difficult to get right — not least because many of them have historically been alienated from the mainstream. Brands always need to be aware and considerate of audiences and creators with specific identities, passions, and backgrounds.

58% **57%**
US UK
say it's essential that a brand's values
match their personal values

45% **39%**
US UK
say it's essential that the brand
is minority-owned

Millennials and Zs expect to feel represented by the brand world. They seek diversity in leadership and ownership, and they expect product innovation to meet the needs of diverse consumer groups.

That said, while this desire for inclusion sets guardrails for content creation, brands should never forget that this is also a space in which people are looking for enjoyment and entertainment. Merely showing up with your values on display is not enough. You have to translate them into something people want to see.

“

Millennials and Zs want corporate behavior to keep up with cultural behaviors.

”



The need for speed

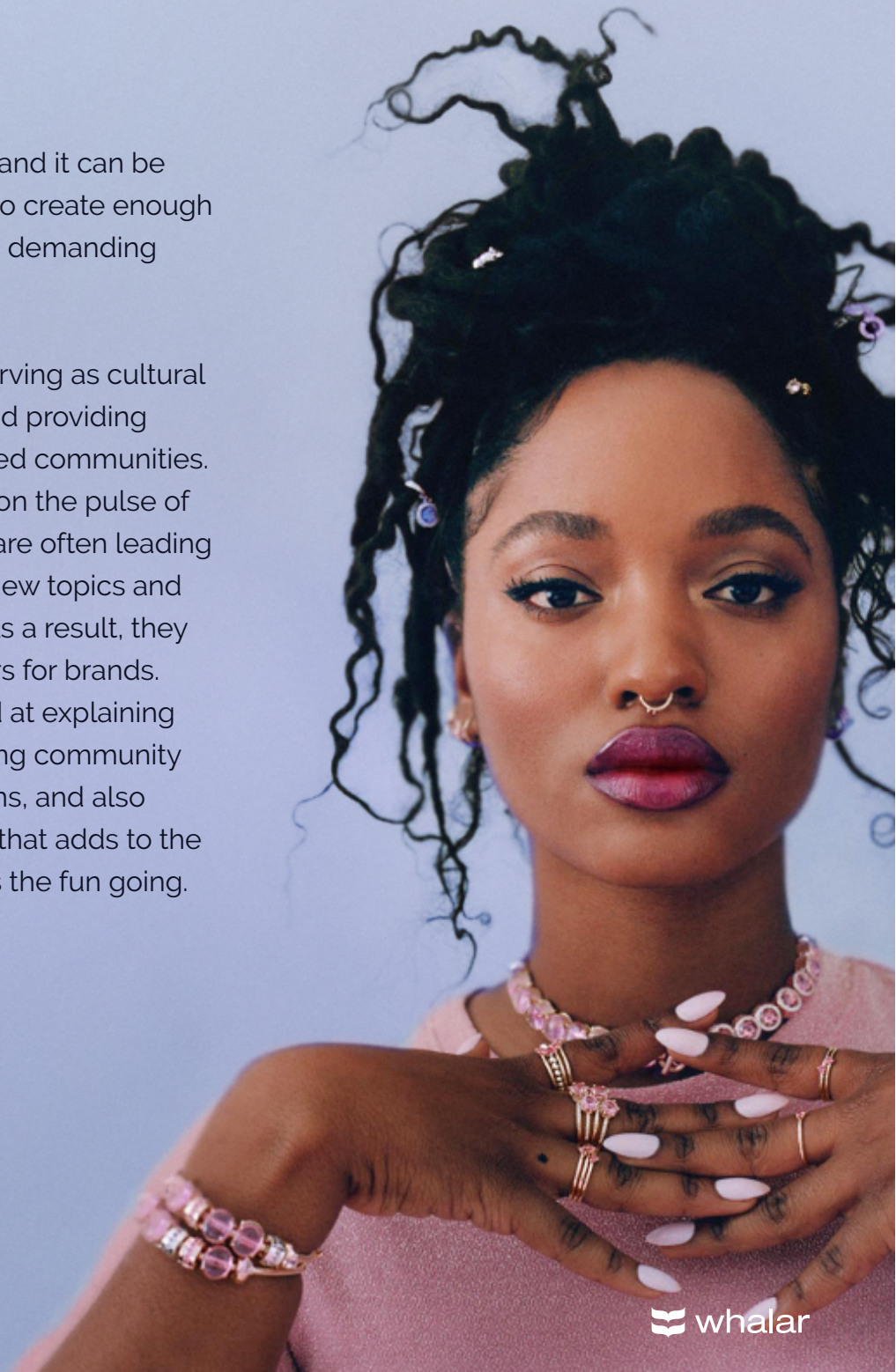
Brands have a major problem when it comes to reaching these audiences: speed. Gen Zs and millennials create, influence, and disseminate trends unlike any generation before them.

They feel confident using their voices to shape cultural narratives within their own generations and even to wider audiences. And they do so extremely quickly and at scale. They've been doing this their whole lives, and they're good at it.

To be viable in these community spaces, **brands need to stay on top of these fast-moving trends.** They have to quickly customize their messages, deliverables, and even the value they add to the communities they want to engage.

Time is of the essence, and it can be extremely challenging to create enough content to keep up with demanding trends.

Creators can help by serving as cultural diplomats for brands and providing access to their own gated communities. They have their fingers on the pulse of these movements and are often leading them as they discover new topics and launch new initiatives. As a result, they can be valuable partners for brands. They're especially good at explaining the road signs, translating community statements and reactions, and also jointly creating content that adds to the conversation and keeps the fun going.





Steps to success

To succeed in these communities, brands need to change their approach. Instead of talking, they need to listen. Instead of telling people what they're missing, they have to celebrate them for who they are.

- They have to find a shared sense of purpose built around a common core of values. And they have to be entertaining or become valued partners of those who are.
- They have to add to the communities, support them in their aims, and help them realize their ambitions.

This takes a considered process:

STEP ONE

Identify the communities that make sense for the brand

Creators are the next evolution of media; think of it as human programmatic, where creators represent and deliver the specific audience brands want to reach.

However, the communities are the judges of brand fit and relevancy, which requires guidance and careful consideration. Brands must always **seek to elevate and empower communities**. If a brand appears to be invading a space where it does not belong, the campaign will backfire.



STEP TWO

Determine how the brand can add value to the community

Brands need to focus on enriching the audience's experience. They can tap into existing communities by partnering with creators, or they can invest time and resources to build their own from scratch—a heavier lift, of course, but if the brands doing it well are any indication, it's an effort that's well worth it.



STEP THREE

Build trusted, respectful relationships with creators in the community

Creators are not communities, nor are they the only leaders of them. Communities usually have a number of creators who make content that helps other members enjoy and navigate these spaces.

Zs and millennials have an affinity for creators, finding value in their relatability, inspiration, and perspectives — not to mention the fun and enjoyment that they provide. It's critical that brands build relationships with creators but also understand their place within their communities. While they can partner with creators, they also need to add value to the community. **This is a long-term project**, nothing like hiring a celebrity to pitch a product. Only with the proper level of investment in time, resources, and interest can brands succeed.



Rules of engagement

When brands collaborate with creators, they must earn the opportunity to access creators' established relationships and help consumers see them in a different and impactful way.

When creators are given the freedom to use their distinct voices to incorporate products, celebrate brand activations, and communicate brand messages that they believe in, the brand stands to gain the consumers' trust, loyalty, and purchase consideration. When entering these spaces, a few ground rules apply:

Practice honesty above all else

Creators should not be viewed as paid actors. The content they create must be in their own voice and style.

Collaborate in ways that make sense

Creators' own personalities and values must be a natural fit with brands and products.

Be fully transparent

Creators must make it clear when their content is sponsored by the brand, including posts, hashtags, highlighted labeling, and non-scripted reviews.

Brands must take care to create spaces for creative freedom, while ensuring that the content aligns with a brand's goals. This can be achieved through respect, partnership, and true collaboration.

Avoid missteps

Brands must avoid appearing artificial and inauthentic. Content scripted by brands or that feels out of character with creators' style and tonality will fail. It must add value beyond being a product placement. And it should never be intrusive. This is an audience that is actively avoiding ads, so any brand-related material must enhance rather than disrupt the content.



How the creator gets funded

Given that Zs and millennials are intolerant of advertising, the creator economy has found new ways to fund itself, including:

PREMIUM CONTENT

Buying subscriptions to premium, exclusive content directly from creators allows Zs and millennials to create their ideal media diet, pushing the content they find relevant and important to them directly in digestible forms. Examples include **Patreon**, **Substack**, and **Discord Premium Memberships**.

RELATIONSHIP LEVELS

People are paying to define their relationships with creators by choosing the type of interaction they prefer. **TikTok** has begun rolling out a monthly subscription tool for select creators with more than 1,000 followers that gives their paying fans perks, like subscriber badges, custom emojis, and subscriber-only chat.

INSIDER INFO

They purchase subscriptions to channels, newsletters, and classes that keep them ahead of the curve. Examples include: **Twitter Super Follows** and **Mighty Networks**.

TOKENS OF APPRECIATION

They can stand out from the crowd by expressing appreciation for the creator's content. Examples include: **YouTube Super Thanks** and **Super Stickers**, and **Twitch Cheer**.

DIRECT COMMUNICATION

They're paying for personalized communications, access to direct messaging, and even personalization to make the follower recognizable to the creator. Examples include: **Instagram Badges**, **Cameo**, **Memmo**, DM/PM access, and **Instagram Subscriber Lives** and **Stories**.

COMMUNITIES

They attend exclusive courses, lectures, and more. **Circle** and **Tribe** have built capabilities that allow creators to monetize their audiences.

55% **46%**
US **UK**

invest in content creators they like through sites like **Kiva**, **Kickstarter**, and **Indiegogo**

Conclusion

Today, brands face a changed landscape in which the traditional way they've reached young consumers — through interruptive advertising — no longer works. Instead of absorbing messaging, Millennials and Zs are actively avoiding ads, consuming content from independent creators, and seeking advice and a sense of belonging in communities.

Brands can play in the space, with rewards that are as high as the stakes. But to do so, they have to partner with creators and the communities they represent, being fully transparent about their intentions and adding value. Creators are fun, entertaining, and beloved by their audiences. However, they cannot be treated as traditional spokespeople, but as conduits for ideas and influence that are welcomed in the communities they represent. A creative, sensitive, and above all entertaining approach can enable brands to enter these spaces and become part of the conversation.





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