

Social Media Celebrities as Digital Media Entrepreneurs: Capturing an Emergent Phenomenon

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Castulus Kolo studied physics at Ludwig-Maximilians-University, Munich (Germany), which he completed with a PhD at CERN. For later studies in cultural/social anthropology he earned another doctorate. Today, he is Professor of Media Management at Macromedia University, Munich, where he also holds the position of Vice-President Academic Affairs and Research. His research is focused on preconditions, diffusion, and effects of emerging media. In parallel to academic activities he gained experience as manager in media industries as well as strategy consulting.

Keywords

Social media celebrities; Social media influencer; Media content; Content production; Uses and gratifications; Media business models; Influencer marketing; Media entrepreneurship; Digital media entrepreneurs

Abstract

Previously unknown online users posting videos have recently achieved a kind of stardom. Such "Social Media Celebrities" (SMC) are "influencers" impacting on content consumption as well as on purchase decisions. By producing new types of content based on their creativity and monetizing it via social media platforms in innovative ways, they also became digital media entrepreneurs.

This explorative study draws from global audience data as well as from video content in international comparison and a representative survey on gratifications sought by its consumption and quality criteria is applied.

The findings suggest that a perceived quality is based on the celebrities' credibility and the sympathy that users feel for them, with gratifications sought much like for traditional media. Users are aware that advertising is an integral part of the content, leading to stronger affiliation of them with SMCs and brands alike, providing challenges and opportunities for users themselves but also for the incumbent media.

Introduction: SMCs and Media Entrepreneurship

Over the past years, more and more individuals posting blogs, uploading videos or photos achieved a kind of stardom (O'Reilly, 2015). Such "bloggers", "vloggers", or "youtubers", as they are sometimes called, usually do not stick to one social media platform only – as the terms might suggest – but orchestrate themselves and their content across several channels. To anticipate the latter, we will refer to them more generally as "social media celebrities" (in the following abbreviated as SMC): individuals, mostly not known from other contexts outside social media that pursue an explicit business model by producing their own transmedia¹ content with high relevance to advertisers reaching millions of (at least so far) predominantly young users.

By this definition, we also want to differentiate them from celebrities who came to fame in the film, music, or sports businesses (Tan, 2017), subsequently exploiting their status for advertising purposes on traditional channels as well as social media. Whilst the economic literature on the superstar phenomenon provides empirical evidence on different types of stars, above all athletes or musicians and the factors of becoming such a star (e.g. Rosen, 1981; MacDonald, 1988; Adler, 2006), SMCs only recently are studied from such a perspective (Budzinski & Gänssle, 2018) with predecessors related to popularity on YouTube (e.g. Chatzopoulou, Sheng & Faloutsos, 2010; Chowdhury & Makaroff, 2013; Marwick, 2015).

1. Most SMC use at least YouTube and Instagram as social media platforms often complemented by an own website, Facebook or Twitter activities. Increasingly, they are also covered by traditional media and even stage their own life events (see also below).

Advertisers increasingly take advantage of this apparently enticing content (Stefano, 2008; Stenger, 2012; Opresnik & Yilmaz, 2016; Steimer, 2017) by letting SMCs introduce new products in explicit as well as in more subtle, implicit ways. This brings about a further aspect after having welcomed already the general advantages of social media as marketing platforms (Mangold & Faulds, 2009; Gensler et. al., 2013; Srinivasan, 2014; Ioană & Stoica, 2014; Jin & Phua, 2014). For advertisers, SMCs add a new type of brand or product "influencers" to the traditional VIPs and other more or less institutionalized opinion leaders and multipliers, respectively (Brown & Fiorella, 2018).

A whole new "transmedia industry" (Mann, 2015) with users as content producers (Bruns, 2008) arose, being extensively marketed by specialized agencies, so-called multichannel networks (MCN in short), that assist the new celebrities to exploit technology and to link up to advertisers (PWC, 2014; Emarketer, 2015; Zabel & Pagel, 2017). This is expected to have a strong impact on the film and TV business (van Dijk, 2013; Holt & Sanson, 2013; Cunningham, Craig & Silver, 2016) as well as other traditional media players – however, not necessarily only to their disadvantage (Kellogg, 2015), as incumbents equally seek their stakes in this business². But also new forms of co-operations between the most successful celebrities and advertisers appear, accompanied by an increasing variety of social media platforms beyond YouTube that celebrities use in combination, weakening both the position of MCN and the dominance of YouTube respectively. Furthermore, some celebrities even build their own brands or negotiate directly with advertisers.

2. See for example AwesomeTV. After starting as an MCN, it is now run as a joint venture of DreamWorks Animation (a subsidiary of NBC Universal) and Verizon Hearst Media Partners.

By producing new types of digital content based on their own creativity and monetizing it via social media platforms, these SMCs can also be considered as entrepreneurs. As such, they touch upon another research issue that is currently studied from at least three directions. Rooted in earlier elaborations on entrepreneurship in general (Shane, 2003; Davidsson, 2004), the issue is investigated today from a media industries' perspective as media entrepreneurship (e.g. Hoag & Seo, 2005; Hang & van Weezel, 2007; Achtenhagen, 2008; Hoag, 2008; van Weezel, 2010; Hang, 2016; Kha-jeheian, 2017; Achtenhagen, 2017) as well as with an emphasis on the role of digital technologies as digital entrepreneurship (e.g. Whittington, 2018) and more generally also as entrepreneurship in the creative industries (e.g. Schulte-Holthaus, 2018). Whilst the need for new venture creation or more entrepreneurship and innovation respectively is largely undoubted and extensively studied for traditional media industries and the incumbents therein (e.g. Will, Brüntje & Gossel, 2016; Hang, 2016) as is the overall role of the media on entrepreneurial activity (e.g. Hang and Van Weezel, 2007), less is still known about entrepreneurship related to independent start-up companies in the media (Achtenhagen, 2008, p. 124). Achtenhagen (2008) defines media entrepreneurship as "how new ventures aimed at bringing into existence future media goods and services are initially conceived of and subsequently developed, by whom, and with what consequences" (p. 126). It covers indeed the activities of SMCs who are, according to Whittington (2018), simultaneously digital entrepreneurs as "[... they] produce digital products, or [...] a digital platform is in some way essential to their fabric" (p. xviii). According to Schulte-Holthaus (2018, p. 99) who emphasizes "passion, lifestyle, bricolage, and symbolic value" as essential elements in theorizing about entrepreneurship within the creative industries in general, SMCs link exactly "the triad of creativity, opportunity, and value

creation" (Schulte-Holthaus 2018, p. 100) as fundamental aspects therein.

Overall, with SMCs we see an example of an innovative business taking off with challenges and opportunities for incumbents and new players from the content perspective as well as from the advertising market's perspective. Apart from the growing body of literature on the challenges and opportunities of advertising alongside the content of SMCs, the increasing managerial professionalism and differentiation into several content categories (Kim, 2012; Influence, 2017), and first attempts to embed the phenomenon within a general economy of stardom (Budzinski & Gänssle, 2018) and media industry economics (e.g. Cunningham, Craig & Silver, 2016), surprisingly little (see also Dredge, 2016) is known so far in terms of explaining SMCs' tremendous audience success as a new type of digital media entrepreneurs.

Hence, this explorative study attempts to empirically capture SMCs as digital media entrepreneurs, as they transform the online media in general as well as the advertising industry in particular and embed the results into existing strands of theory. This research draws upon the analysis of global audience data and video content for selected categories with the largest (in terms of subscriptions) audience and advertising relevance in international comparison (i.e. gaming and fashion), plus it uses a representative survey on gratifications generally sought by the consumption of SMC's content and the quality criteria applied by its consumers.

After having structured the phenomenon of SMC in a dynamic perspective (part 2) and introduced the applied empirical methods (part 3), we will devote a subsection in part 4 to answering each of the following four research questions (RQs):

- RQ₁: How large is SMCs' audience across categories and how dynamic is its change?
- RQ₂: What is their content and how is it orchestrated across different platforms?
- RQ₃: How do users qualify the SMC's content and which gratifications do they seek by its use?
- RQ₄: To what extent do users accept monetization of their attention by advertising?

We will conclude by a summary of limitations of this study and an outlook on further research that the topic invites to (part 5).

Structuring the Phenomenon of SMCs in a Dynamic Perspective

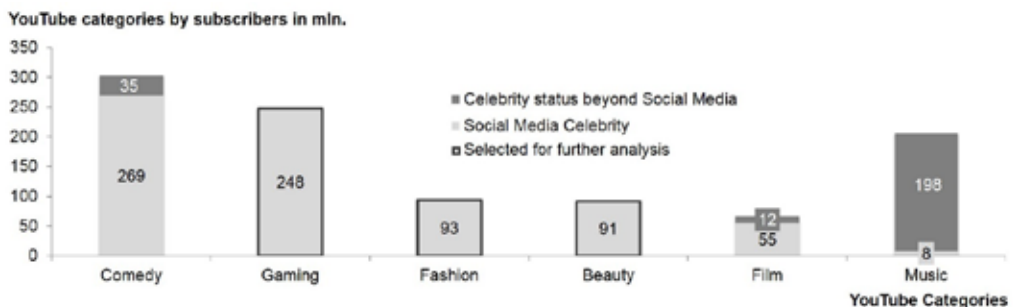
SMCs post their content across various channels on diverse topics. These are summarized into schemes of categories that differ across the currently leading suppliers for audience rankings (Socialblade, 2018;

Tubefilter, 2018; Vidstatsx, 2018 and to some extent also Wikipedia, 2018). We derived the following consolidated list of categories dominating in terms of subscribers:

- news & politics,
- comedy & entertainment,
- travel & events,
- fashion & lifestyle (also "fashion" in short in the following),
- beauty & cosmetics (also "beauty" in short in the following),
- gaming & games (also "gaming" in short in the following),
- do-it-yourself,
- food & cooking

Music and sports are also very strong in terms of audience numbers but here most often traditional celebrities excel (see also Figure 1).

Figure 1: Overall YouTube subscriptions across exemplary categories
Source: Own calculation on the basis of raw data from (Socialblade, 2018); data taken in June 2017



On the other hand, pets & animals, another popular category of videos and photos, usually have no human protagonists. Additionally, the following categories can be discerned: science & technology, education, nonprofit & activism, and outdoor (that some comprise with sports, others with travel). And still there remains a residuum of content hard to classify – e.g. the recently very successful toy review by a school boy (see Ryan ToysReview in table 1).

When it comes to the specific content within a category, it may be as simple as filming themselves playing video games or displaying their latest shopping haul. Obviously, the formats or types of content differ across categories as do their degrees of freedom in terms of cinematic features, narratives, and numbers of performers. Becoming an SMC or an “influencer” in the perspective of advertisers, respectively, is among the career wishes of quite a number

of youngsters today (Böhm, 2017). This is comprehensible with regard to the enormous financial success these celebrities have in parallel to their fame (see table 1), with no need to share, since almost all such social media “influencers” act as solo performers (see also part 4).

The figures in table 1 estimated by Forbes (2017) are based allegedly on data from YouTube, Social Blade, and Captiv8 as well as on interviews conducted with diverse experts in the field. It is the third compilation of such data, following one in 2015 and another in 2016, which documents a tremendous rise from 57.3 mln. USD to 70.5 mln. USD (+23%) and 127.0 mln. USD (+80%). The latter corresponds to 0.63 USD per subscriber. Extrapolating this number in order to estimate the overall volume earned by all top 100 channels, we get 1.2 bln. USD.

Table 1: Leading SMCs according to their earnings in 2017

Source: Forbes (2017) for earnings and list, Socialblade (2018) for subscribers, own division of categories

Rank	Name (pseudonym)	No. of protagonists	Earnings (mln. USD)	Subscribers (mln.)	Earnings/ Sub-scriber (USD)	Category
1	Daniel Middleton (DanTDM)	Solo	16.5	15.7	1.05	Gaming & Games
2	Evan Fong (VanossGaming)	Solo	15.5	21.0	0.74	Gaming & Games
3	Dude Perfect	Group	14.0	15.7	0.89	Comedy & Entertainment
4	Mark Fischbach (Markiplier)	Solo	12.5	17.9	0.70	Gaming & Games
5	Logan Paul	Solo	12.5	7.9	1.58	Fashion & Life style
6	Felix Kjellberg (PewDiePie)	Solo	12.0	56.2	0.21	Gaming & Games
7	Jake Paul	Solo	11.5	8.3	1.39	Comedy & Entertainment
8	Smosh	Duo	11.0	22.7	0.48	Comedy & Entertainment
9	Ryan ToysReview	Solo	11.0	8.3	1.33	Other (toys review)
10	Lilly Singh (IfSuperwomanII)	Solo	10.5	12.0	0.88	Comedy & Entertainment

Obviously, SMCs don't come out of the blue and also their influence has grown across time. In terms of the latter at least four phases can be distinguished:

- The starting point of the phenomenon are "influential co-consumers" in social media that excel in this respect among their peers. As such they can already be discerned and were studied in their role for brand communication (see also Kolo, Widenhorn, Borgstedt & Eicher, 2018). At a certain point of success or impact they increasingly get approached by agencies funneling them to advertisers seeking to engage in influencer marketing.
- With a systematic relation to advertisers we would consider them as becoming real influencers (one may add at this point in time the suffix micro to denote their still limited impact). "Micro influencers" don't operate a business yet. However, they may already receive free product samples to talk about in their postings.
- As media entrepreneurs they appear when they realize that their talent and their already attracted audience within a specific category (hence we propose to term them "category influencer") is substantial enough to establish contractual relationships with advertisers leading to a monetization of their content.
- Finally, as "SMCs" they really stand out of the crowd and become a media brand in their own right known beyond the original category of their content and spilling over also to traditional media covering them up to live events in their favor

This qualitative distinction may be complemented by a quantitative one when more is known across all phases. As we will focus on the last phase in our study, we can only

refer to the tentative boundaries given by influencer agencies like trnd, mavrk, linki-like, buzzador, StarNGage, tubevertise, or mediakix. Whilst micro influencer range in the order of 1000 to 50,000 followers, the influencers that already achieved a certain level of stardom within a category reach up to about a million. SMCs who in turn have fame beyond a specific category and become media brands in their own right start with about a million followers on at least one platform.

As influencers, SMCs add to other types of influencers outside social media that were and are also employed by marketers³. They span a highly diverse range across different degrees of institutionalization and different levels of dependency on advertisers. Generally, they are characterized by (a) a high credibility (by being an authentic co-consumer, a celebrity or an expert of some kind with a high reputation) in the relevant target group and (b) a relatively high reach within a specific group of people. Both characteristics are necessary and sufficient to trigger a viral process, which makes influencers particularly interesting for marketers beyond their mere primary reach. In marketers' view, what also follows is that an influencer is an influencer only in a specific target group; it is not a general attribute. By marketing cooperation with influencers, a brand benefits from the reputation of a third person and his or her reach as an opinion leader. All these properties mentioned above are not necessarily linked to social media. Hence what is called influencer marketing has its predecessors in traditional word-of-mouth marketing (Pophal, 2016; O'Guinn, Allen, Close-Scheinbaum & Semenik, 2018). However, social media platforms add powerful new arenas for the

3. Overall, what explains the longing of marketers to ever new types of influencers, is the fact that marketing based on a third person's reputation and a viral process triggered is particularly interesting for a brand as brands with a high rate of recommendations exhibit superior growth (Marsden, Samson & Upton, 2006).

electronic word-of-mouth (Carter, 2016). For the young it is not only an additional channel but rather the predominant (if not the only one) as they increasingly ignore mainstream media (Ryan, 2017). As a consequence, influencer marketing works similar to traditional testimonials or celebrity endorsements (Pringle, 2004) with the key difference that whereas traditional celebrities circulate around the reason of their fame in stories they tell (Erdogan, 1999), influencers have the freedom to develop their own stories.

Empirical Approaches, Methodologies and Data

In order to collect empirical facts on the SMCs' reach, on celebrities themselves, and their specific content as well as on the characteristics of the audience, we collected data from several types of sources. Three different methods and the research questions introduced above shall serve as a basis for an explorative study focusing on different aspects of the phenomenon of SMCs.

Firstly, we mapped the portfolio of offerings by devising categories of content the SMCs can be attributed to. By doing so, the relevance of the categories was quantified and the most successful celebrities were listed – both on the basis of available ratings (Socialblade, 2018; Tubefilter, 2018; Wikipedia, 2018; Vidstatsx, 2018) which were reconciled to control for data quality. This gave us an overview of the breadth of the phenomenon per category and its overall size and dynamics. Furthermore, a comparison of the leading SMCs internationally with Germany's levels across categories allows discussing national results in the light of international developments. For this study, "international" shall denote the fact that celebrities appear on the general top 100 ranking of Socialblade

(2018); compared to the ones listed as "German".

Secondly, a structured content analysis was applied to three different categories of SMCs' content on YouTube: "gaming", "fashion", and "beauty" (these are among the most successful ones and address very diverse audiences; e.g. in terms of gender). This allowed for a better understanding of key factors for the most successful celebrities and their contributions in terms of audience and its engagement (given by the number of subscribers, views, likes and combined measures like views per subscriber). Apart from the narratives pursued, cinematic aspects were also tracked (Faulstich, 2013; Ryan & Lenos, 2013) as well as the integration of digital platforms other than YouTube as an element of storytelling. Since we also wanted to learn whether the content itself is the leading criterion for audience enticement or rather the personality of the SMC, we additionally documented aspects of self-disclosure. For all three categories the 20 leading international celebrities as well as the 20 highest ranked ones in Germany were selected and the three most viewed videos (in May 2017) analyzed. All international SMCs were communicated in English, and some even provided versions in several languages or with subtitles.

And thirdly, we conducted an online survey in June 2017 based on an online panel (representative in terms of age, gender, and formal education) with $n=1000$ among the 14 to 35 year-olds in Germany. The emphasis was put on the gratifications sought by such content (see e.g. Ruggiero, 2000; Schweiger, 2007), the quality aspects that guide individual judgments of its value, as well as on the attitude towards advertising and its potentially compromising effect on the perceived authenticity of the SMCs.

Empirical Findings on the SMC Phenomenon

In the following we will systematically address the research questions formulated in the introduction.

Ad RQ₁: How large is their audience across categories and how dynamic is its change?

Figure 2a gives an overview of all top 100 channels on YouTube. 54% or the most channels are run by SMCs. The other channels are split to 23% between institutional channels (mostly on certain topics like music or sports, some ran by YouTube itself) and music celebrities (like Justin Bieber). The leading SMC Felix Kjellberg from Sweden, alias PewDiePie, ranks with more than 50 mln. subscribers, even among the top ten of all YouTube channels.

Figure 2a also underlines the fact that the phenomenon is not covered with a handful of protagonists: until the end of the top 100 it includes only channels with at least 10 mln. subscribers. As the exemplary categories of Figure 2b for gaming and fashion show, only few celebrities produce content in German language. Although some international stars have their adaptations to foreign, non-English languages (see for example Zoella, a UK fashion celebrity with her German edition), over 90% of the top 100 channels on YouTube are in English and they address mainly a global audience.

Generally, different celebrities within a category have spanned a “long tail” from today’s most successful representatives to the still would-be influencer. Hence, the dynamics within the categories allows opportunities for newcomers to move up the ranks. And on the top of all categories, there is room for several protagonists – with 40% respectively, 52% being the share of top 10 to top 50 subscriptions in gaming and fashion, respectively.

Figure 2: Top 100 ranking of all YouTube channels (a) and specific distributions for gaming and fashion (b)
Source: Socialblade (2018); values taken in May 2017

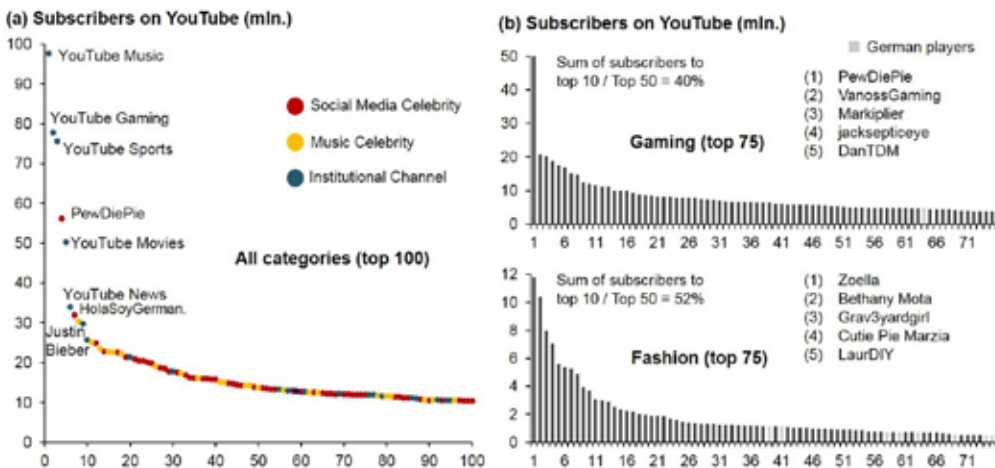


Figure 3 shows that whilst some protagonists like Lilly Singh (alias IISuperwomanII) and Mark Fischbach (alias Markiplier) managed to keep their rate of new subscribers over more than three years at about the same level, Zoella's new audience is shrinking. On the other hand, at least at this stage of maturity of the phenomenon there are always entirely newborn celebrities like Ryan and his ToysReview.

Ad RQ₂: What is their content and how is it orchestrated across different platforms?

Advertisers value these SMCs as they do not only promise the attention of the sought-after young target groups but they even promote the brands, products or services directly in their contributions. This is assumed to give credibility (Djafarova & Rushworth, 2017) to the promotions and hence influence the audience in a very effective and possibly also efficient way (Brown & Fiorella, 2013; WOMMA, 2013). However, the celebrities acting as brand or product influencers risk to obstruct their reputation by overdoing advertising partnerships and to jeopardize their newly gained wealth (Blickpunkt: Film, 2015, McAlone, 2016).

The whole new area of video content is dominated by one-protagonist productions – at least for the top-ranking ones. With slightly over 50%, the video contributions in gaming, fashion and beauty are enacted solo. Although differing to some extent across categories, SMCs are generally young; with “gaming” protagonists being among the oldest ones. For “fashion”, the majority is in their twenties and for “beauty” they are even younger. In the field of gaming there are exclusively males in the international top ranks, whereas in the fields of fashion and beauty almost all are female. See also table 2 for the detailed shares.

For the two exemplary categories – fashion and gaming – Figure 4a shows that several social media platforms other than YouTube are employed to orchestrate the protagonists' activities. Whilst in fashion Instagram became an absolute must in parallel to YouTube (often even preceding when counting success among subscribers), Facebook is a necessity for gamers. Differences become visible mainly on platforms that follow YouTube, Instagram, Facebook, and Twitter in importance. Here, Snapchat appears to be essential in fashion, whereas gaming celebrities run by far more often their own shops.

Figure 3: Exemplary growth dynamics in terms of new subscribers
Source: Socialblade (2018); values taken in January 2018

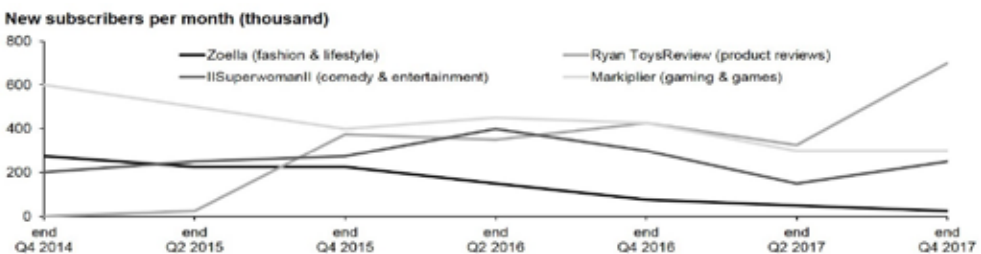


Table 2: Sociodemographic characteristics of leading SMCs
 Source: Own analysis; May 2017; n=20 per category and nationality

(in %)	Fashion (internat., English language)	Fashion (Germany)	Gaming (internat., English language)	Gaming (Germany)
≤20 years old	10	20	0	0
>20 and ≤30 years old	80	70	15	47
>30 years old	10	10	85	53
male	0	5	100	100
female	100	90	0	0
other	0	5	0	0

In general, when analyzing quantitative audience measurements, success in terms of subscriptions (YouTube) or followers (Instagram) appears not to be based on publication frequency nor on the time a channel has been in operation, as no correlation can be derived. It is the specific content that makes a difference here. Whereby achieved numbers of followers on Instagram and subscribers on YouTube are significantly correlated (see Figure 4b). In both cases, views also significantly correlate with subscribers or followers respectively. So, the audience success in terms of the latter is equivalent to taking views as a proxy for it.

Concerning measures for the engagement of the audience, average patterns do not differ significantly when it comes to international celebrities and their fans or German ones, as table 3 summarizes. Furthermore, between the two exemplary categories fashion and gaming, the differences are not substantial and only slightly significant ($p < .05$). Overall, the rates are quite remarkable, considering that some views account to billions.

Figure 4: Importance of different social media as platforms (a) and correlation of success on Instagram versus YouTube (b)
 Source: Own content analysis; May 2017; n=20 per category (only internationally leading celebrities)

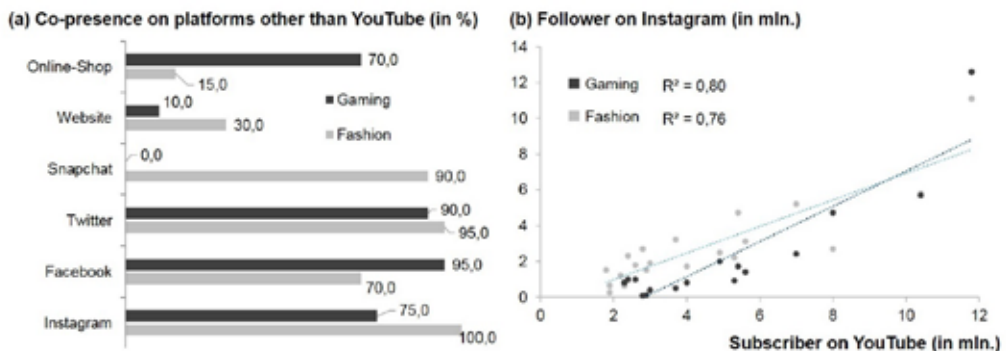


Table 3: Engagement rates for leading international as well as German celebrities

Source: Own analysis May 2017; n=20 per category and nationality

	Fashion (international, English language)	Fashion (German)	Gaming (international, English language)	Gaming (German)
Likes/ View	4.9	5.5	3.2	4.5
Comments/ View	0.4	0.5	0.5	0.4
Comments/ Likes	7.6	8.8	15.7	9.1

SMCs do not hesitate to add personal information to their videos. And indeed, the content often contains several aspects of self-disclosure by the protagonist, emphasizing its authenticity as shown in Figure 5.

Expectedly, the variety of contributions differs across categories. However, as the relevance of different “formats” per category is relatively similar when comparing German top-celebrities with international ones, a distinctive pattern of formats per category appears to be quite established. For example, whilst product overviews and shopping hauls dominate in fashion, so do sequences of gaming experience and walks through specific games in gaming (see also Kolo & Haumer 2018).

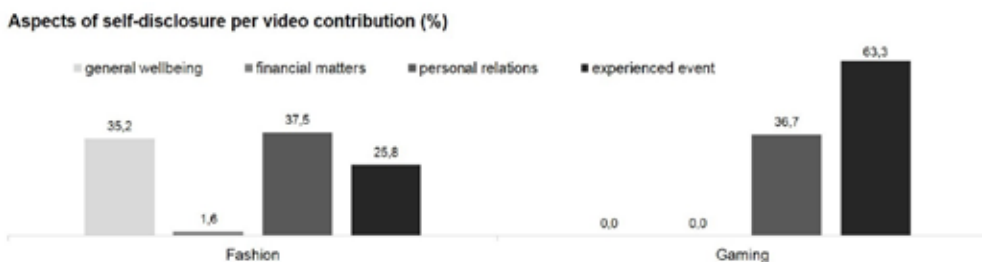
In fashion, German protagonists’ content seems more varied than the one in the international league, as in the former most

formats appear in higher frequencies. In gaming it is rather the other way around. In any case and despite the different formats, the content is always rather specific to a category. Apart from these variations in content, 100% of all analyzed videos of the top celebrities in the categories studied in detail exhibit product placements or brand references, both internationally and in Germany.

The quite established formats per category are also reflected in the duration of the videos per category. Whilst in the case of fashion the videos last on average for about 10 min. (610±302 sec. international; 578±225 sec. German), they amount to about 20 min. for gaming (1385±1238 sec. international; 1120±709 sec. German) – in both cases with considerable spread.

Figure 5: Aspects of self-disclosure of the protagonist in YouTube videos

Source: Own content analysis; May 2017; n=20 per category (only internationally leading celebrities)



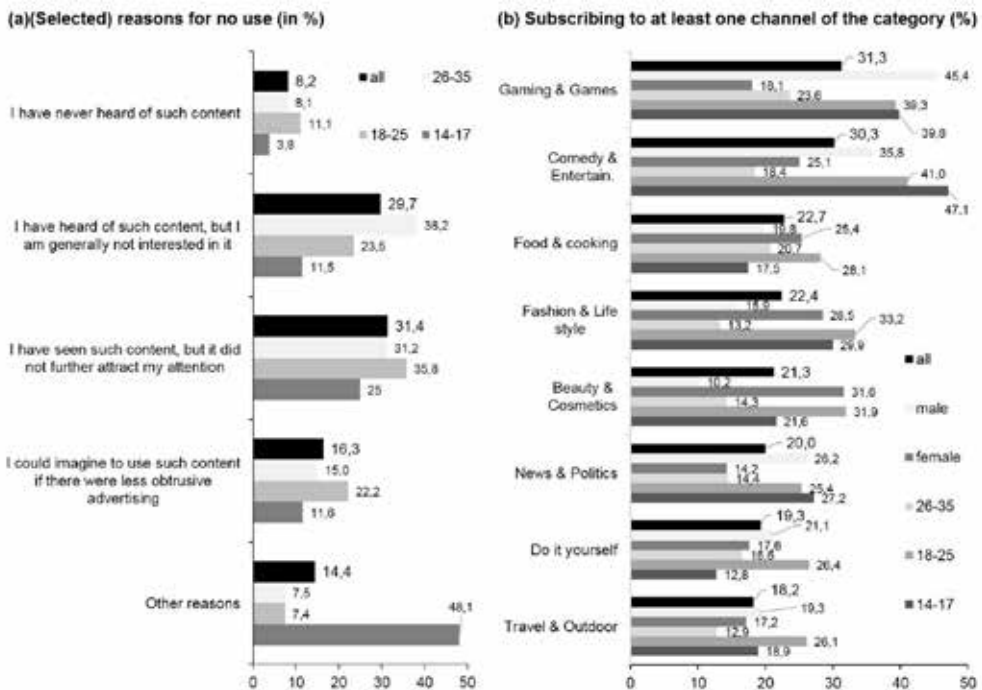
Ad RQ₃: How do users qualify the content and which gratifications do they seek by its use?

In our analysis of the survey results all respondents were considered users of SMCs' content when they watched videos of this kind at least occasionally. The users show a clear age effect with the highest fraction at 83.6% among the 18-25 years old and a significant drop to 69.1% among the 26-35 year-olds. The slight drop also to 81.6% from the 14-17 year-olds can be explained by parental restrictions to the use. With 78.1% male to 76.3% female usage no significant gender differences are prevalent. Also, formal education has no influence, given the representative survey data with an even distribution at an average of 4/5 of all online users between 14 and 35 year-olds. The dominant reasons for no use (see Figure 6a) are lack of interest in the content,

even when already tried out. Only a minority has not yet heard of such content or is put-off totally by its ad-heaviness.

In terms of numbers of users that are subscribed to at least one channel within a category (Figure 6b), gaming & games as well as comedy & entertainment dominate with food & cooking, fashion & lifestyle, and beauty & cosmetics following at a distance but quite close to each other. Not far behind are news & politics, do-it-yourself, and travel & outdoor. This result clearly shows that SMCs' content is not at all restricted to or even focused on specific content categories. Hence, it is, in principle, a relevant competitor to all general as well as special interest in traditional media players. Besides this general pattern, the clearest differences in gender prevalence show up in games & gaming as well as in fashion & lifestyle, and beauty & cosmetics (in the

Figure 6: Selected reasons for non-use (a) and subscription patterns across categories (b)
Source: Own survey; n=1000; German user; June 2017

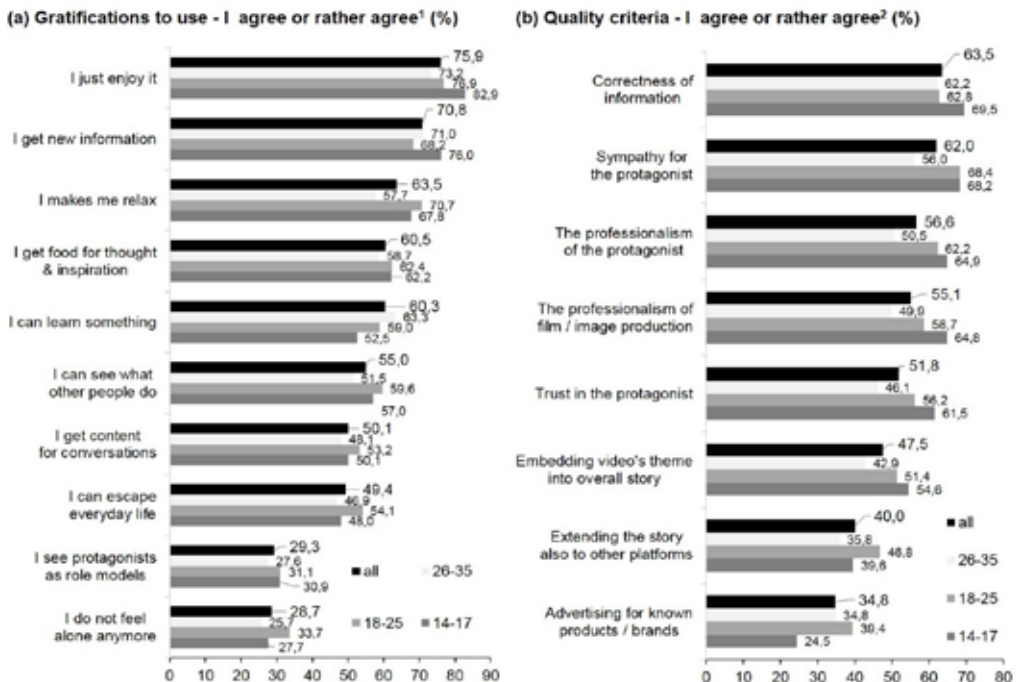


opposite direction). Games & gaming is also attracting the highest fractions of older users as is food & cooking. The youngest age group is particularly enticed by games and gaming, plus by comedy & entertainment.

But what exactly attracts the vast audiences to this new kind of content and what are the perceived quality criteria distinguishing more or less successful players? We expected that the audience success is based not only on the specific online activities but that it is at least also linked to the everyday life of such celebrities beyond the virtual, as extensive self-disclosure (c.f. Nardi, Schiano, Gumbrecht & Swartz, 2004; Bane, Cornish, Erspamer & Kampman, 2010; Tang & Wang, 2012; Chen, 2013) is a characteristic element (see also above).

Across all age groups (and gender) a relatively similar pattern becomes visible (see also Figure 7a): users seek gratifications by the consumption of SMCs' content very much the same way as they do with traditional media content. Clearly leading is the search for enjoyment, followed by information interest and relaxation. All other gratifications asked for in the survey correlate strongly with the latter three – apart from the following two: the consumption as a cure for loneliness and because the protagonists are seen as role models. These two aspects also correlated more with each other than with the rest of gratifications tested. Users who score high at the latter two gratifications score lower at the former three (and vice versa). However, they constitute a clear minority. No significant differences show up when comparing grat-

Figure 7: Gratifications sought (a) and subjective quality criteria (b)
 Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally SMCs' content; ¹ «Why do you use SMCs content?»; ² «How do you evaluate the quality of SMCs' video content?»



ifications sought by subscribers of different categories. So, the results outlined can be taken as a general pattern.

Overall, the key criteria for judging the quality of the celebrities' content (at least implicitly) do not differ substantially from what is known as such for traditional media content (see Figure 7b). Information or facts given should be correct and "professionally" elaborated in the respective context. In addition to that, users do claim that they also expect professionalism in terms of film or image production, i.e. movie making properties. However, from the perspective of a traditional producer of video content, this might be questioned for the typical SMCs' output⁴. What is specific for this type of content is that a sympathy for the protagonist seems essential. And here, trust in the protagonist replaces trust in a traditional media brand that is equally important. A minor role plays embedding of the single videos in an overall story or programmatic structure. No significant differences appear with age or gender, or formal education.

On the one side, the content analysis showed that SMCs are happy to share quite

4. This is also to be doubted on the basis of our content analysis that showed very little cinematic finesse.

personal details of their everyday life with their audiences. On the other hand, sympathy for the protagonists seems to be an essential quality aspect as does trust in them.

For all categories covered explicitly in the survey, the personality of the protagonists is considered by almost half of the users of such content to be an influential factor on how brands or products that are placed or presented in the videos are perceived (see Figure 8 for details). For the majority of users, the personality does matter, regardless of the quality of the content, and over 40% would like to learn more about their personality. Although only a third would actively research more information on them. This pattern does not show any differences depending on such aspects as gender, age or formal education.

Ad RQ₄: To what extent do users accept monetization of their attention by advertising?

The top ranking SMCs work with different advertising models, sometimes in parallel. Whilst newcomers are often happy with free product experiences for promoting specific brands, experienced celebrities do rather go more systematically for CPE, CPC, and CPA (see table 4).

Figure 8: The role of the personality of SMCs

Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally SMCs' content; «How important is the personality or the authenticity respectively of the SMC to you?»

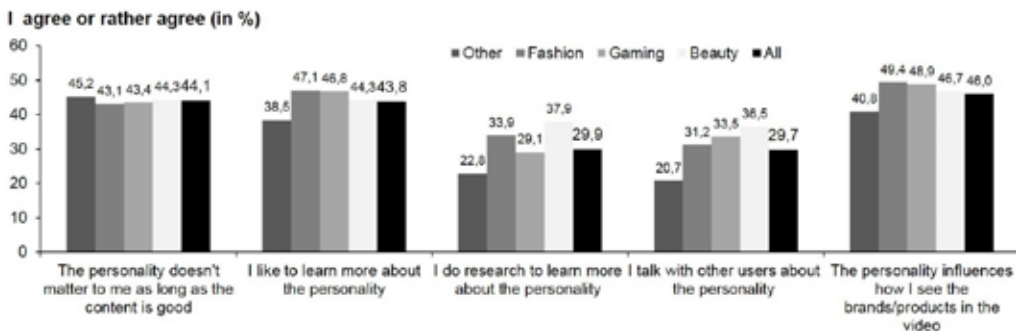


Table 4: Advertising models of SMCs
Source: Own compilation

Model	Description
Pay per post/ video	Influencer is paid a flat rate for the creation and publication of a post (video, blog post, tweet, photo).
Free product/ experience	Instead of receiving financial compensation for his or her work, the influencer is offered free products, all-expenses-paid travel, etc.
Cost per engagement (CPE)	Compensation is based on the level of engagement generated by a publication (e.g. likes, shares, tweets).
Cost per click (CPC)	Brand pays for the consumer who has clicked on an item linked by influencer to the brand.
Cost per acquisition (CPA)	Compensation is based on a number of sales/subscriptions they generate for the brand.

The latter is also driven by an increasing professionalization of the entire domain of celebrities' content in terms of partnering to advertisers where multi-channel networks and other specialists increasingly take over the coordination between advertisers and the plethora of possible partners among the already established and rising social media stars.

Most celebrities do not see their partnership with advertisers as a handicap and hence openly communicate it. On the contrary, it grants them access to genuine information and the latest developments that subscribers expect. This is exemplified by a typical statement from Tanya Burr on her channel in Figure 9.

Figure 9: Example for disclosure of advertising relationship
Source: YouTube; August 2017; <https://www.youtube.com/watch?v=5wh41a1osTQ>

Tanya Burr ·
Am 18.08.2017 veröffentlicht

ASOS UNBOXING HAUL.
Shop the new Tanya Burr Cosmetics collection: [https://www.superdrug.com/micrasite/...](https://www.superdrug.com/micrasite/)
I hope you're all having a lovely day :)

I receive a percentage of the revenue from purchases made through links in this post with an asterisk next to them. Please note that this does not drive my decision as to whether or not a product is featured or recommended.

Makeup I'm wearing in this video:
NARS tinted moisturiser*: <http://bit.ly/2qNKMJw>
NARS Radiant Creamy concealer*: <http://bit.ly/2qJQGfj>
Tanya Burr Cosmetics Brow Palette*: <http://bit.ly/1pwCcER>
Chantecaille powder: <http://bit.ly/2vYcfm5>

MAC Extended Play mascara*: <http://bit.ly/26g19Bd>
Maybelline Lash Sensational*: <http://bit.ly/2vhh6d5>
Tanya Burr Cosmetics Bear Hug Lipstick: <http://bit.ly/2vnrQ2f>
Le Metier de Beaute eyeshadow in Nutmeg*: <http://bit.ly/2uJQdEP>
Rimmel Match Perfection concealer*: <http://bit.ly/2uK3ERP>
Revlon Aucoin contour powder*: <http://bit.ly/2uR0T33>
Tanya Burr Cosmetics Warm Bronze: <http://bit.ly/2vq9215>

Clothes & Accessories I'm wearing in this video:
Dress: Sandro, but sold out online
Earrings*: <http://bit.ly/2u56XP>
Trainers: <http://bit.ly/2u5o1f1>
Mejuri jewellery*: <http://bit.ly/2u5wmeX>

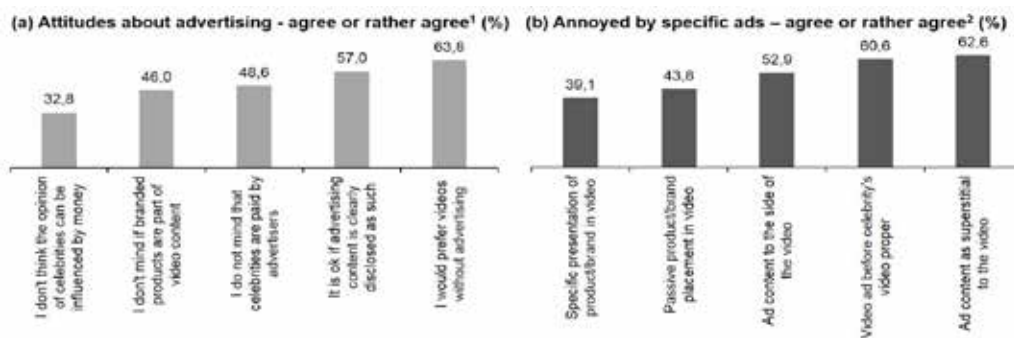
Advertising in the context of YouTube videos is not a subtle add-on. The majority of users (59.2%) always or rather frequently observed ads with videos, and another 30.3% at least occasionally. Only 10.6% have seen it rather rarely, rarely or never.

Although a majority would prefer videos without advertising (Figure 10a), the specific presentation of brands or products respectively in a video is seen as the least annoying form of ads (Figure 10b). About half of the users do not mind that the protagonists are paid and only a third thinks that their opinion is not influenced (Figure 10a).

41.8% of users of SMCs' videos generally think they have purchased goods because of some kind of promotion in a celebrity's video – however, as a direct consequence to a specific mentioning only 21.4% have (29.1% and 25.7% for fashion and beauty). Still, 18.1% buy products that are unrelated to the video topic but expected as being relevant for the audience, for example a travel service promoted in a fashion video. Here again with 23.1% and 25.2% significantly higher for fashion and beauty as on average.

Figure 10: Attitudes (a) and annoyances (b) concerning advertisements

Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally SMCs content; ¹ «How do you generally view products and advertising content in the contributions of SMCs?»; ²«Do you experience the following forms of advertising as annoying? »



Conclusions and Further Research

The results of our study shed light on the relevance and dynamics of content by SMCs intermingled with brand or product commentary. With hundreds of such innovative media players in diverse categories attracting a substantial number of subscribers, a new and relevant area of production of media content is on the rise. This development is reflected on the younger media users' side by significant time spent for its con-

sumption, its integration into metacommunication on related issues within youth cultures, and its impact on their purchase decisions.

Advertisers increasingly jump on the trend with potential effects on spending for traditional media – although real shifts have yet to be researched. On the other hand, SMCs do already embrace traditional platforms to further orchestrate themselves and foster their fame. Daniel Middleton (alias DanTDM) (see also table 1), for example, a renowned

player of Minecraft computer game with over 11 billion views on YouTube, recently went on a world tour that included four sold-out nights at the Sydney Opera House (Forbes 2018). Furthermore, the successful celebrities are increasingly featured by incumbent media from print to television.

Although users are clearly aware that advertising content is an integral part of these media offerings, this does not generally put them off – leading to a new kind of “symbiosis” of advertising and celebrities’ stories.

In absolute terms, the total revenues of SMCs (top 100) were estimated to amount to 1.2 bln. USD (see chapter 2). This number is progressively growing and will probably approach 6 bln. USD in the mid-term – it is paid by advertisers for video internet advertising in total (PWC, 2017). However, even then it will still fall far behind total video revenues that in the US alone amount to 120 bln. USD, of which 12 bln. come from home video OTT or streaming respectively (PWC, 2017). Hence SMCs’ content will be an important contribution to the portfolio of video entertainment but most likely never dominate it.

The success of the content provided by the SMCs is very much based on the celebrities’ credibility and the sympathy users feel for them as well as on the narratives themselves. In conjunction with the latter, the means of self-disclosure are an important element. Formal movie making features, allegedly appreciated by users (as confirmed by the survey), cannot be confirmed by our content analysis. We expect that with the increasing competition among the celebrities, professionalism (i.e. cinematic finesse) could become a relevant differentiator.

Although users are clearly aware that advertising content is an integral part of these media offerings, this does not generally put them off – leading to a new kind of “symbiosis” of advertising and celebrities’ stories. This basically confirms advertisers’ expectations for influencing consumers by brand or products commented on or simply exhibited in the videos, photos, and texts of SMCs. However, there seem to be limits of monetizing attention by advertising as the latter is experienced in a trade-off with credibility, when overdone.

In any case, such kind of content is an increasing challenge to traditional media players by competing for advertising money and questioning existing advertising models. But we think it could also be a basis of cooperation with new business models for the benefit of both. Alternatively, celebrities born on social media may ultimately become so successful that they will constitute their own brands going beyond their usual social media – among others, beauty products, cooking tools, and fashion items. The rather unlucky species burn up and disappear setting an end to a kind of a social media stardom “life cycle”.

Our study was of an exploratory nature and intended to prepare for the testing of more specific hypotheses and theoretical concepts, respectively. Hence, we acknowledge limitations and see ample room for further research.

As we focused on leading international and German speaking celebrities, we cannot generalize the findings to a truly intercultural perspective. In some countries or cultural contexts patterns could be very different. Furthermore, it was only a snapshot. For more robust results such a very dynamic field would require a more systematic observation, across time. To fully understand the dynamics then, the focus on users and celebrities would have to be extended to all the third parties involved – at least the advertisers and their service providers like multichannel networks. This would also

allow one to elaborate on the life cycle of social media stardom from starting as a market maven (Feick & Price, 1987) with above average brand engagement (Spratt, Czellar & Spangenberg, 2009) and social media activism (which we labeled as influential co-consumer) via being a micro influencer with a fan base of several thousands to becoming a category wide influencer still known rather to its specific users only to reaching global stardom beyond a topical clientele, and the eventual burning up. These phases are paralleled with the becoming of an entrepreneur, increasing professionalism and the elaboration of more and more refined business models.

For further research, we suggest deriving a structural model of the newly developing industry and validating it with specific cases along the life cycle. Furthermore, a time series analysis shall shed light on the sustainability of stardom and its conditions – we have seen here that they come and go in time spans that are rather short compared to the one of stars that came up via traditional media. To better understand the possible opportunities for the latter with SMCs, content, research on how young users integrate it in their other media usage would deserve attention too. In this context, the different means of interaction with followers or subscribers, respectively, would also add to a better understanding of the phenomenon. We expect that the different levels of stardom along the influencer life cycle (see above) can also be defined by the phases of changing interaction qualities with users (including the burning up phase). The high commitment, which is shown already in the early phase before substantial earnings are experienced, emphasizes a remarkable entrepreneurial orientation (Mütterlein & Kunz, 2017) of SMCs; and researching their motivation should be a rewarding endeavor as well. It could even lead to a celebrity incubation scheme as a business model.

Finally, one should give attention to the impact of SMCs on advertisers, on advertising in general as well as on the related industries (e.g. fashion or games). Also, the regulation of how advertising content or, more generally, of how every statement referring to a brand has to be labeled, should be taken into account (as potentially setting a frame for future development). Such regulations for this new phenomenon have only been recently set-up in many countries, and they have yet to be further adapted.

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