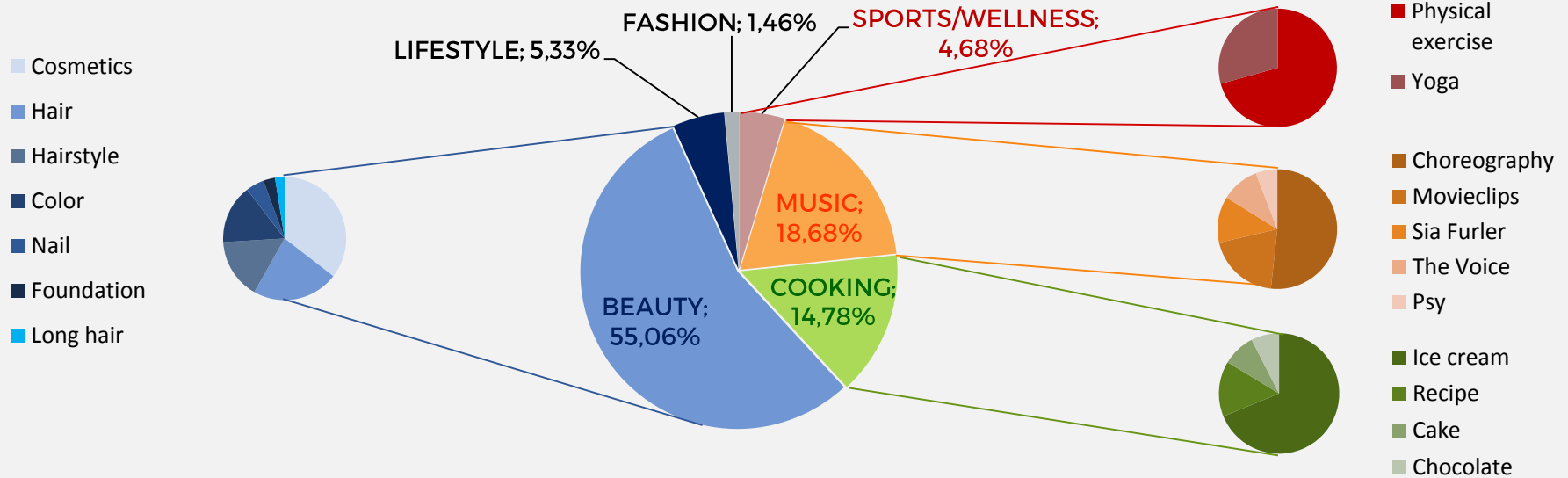


**BRANDS CHALLENGE : ENGAGING
25 TO 44 YEARS OLD FRENCH WOMEN
ON YOUTUBE**

WHAT DOES THE TARGET DEMOGRAPHY WATCH THAT OTHERS DON'T ?

OVERVIEW OF THE TARGET DEMOGRAPHY'S SPECIFIC CONTENT INTERESTS



After setting aside topics due to the “kids bias” among the 25-44 women demography on YouTube, and topics too small in views, two distinct categories of topics emerge in the target demography’s interests :

- **40 %** of views are topics **not specific** to this target and are present among all YouTube audiences’ preferences
- The **60%** remaining are **20 major target-specific Topics**

These specific topics belong to **six main YouTube interests (or verticals)** : Beauty, Music, Cooking, Lifestyle, Sports-wellness and Fashion.

THE 25-44 WOMAN SPECIFIC INTERESTS ARE NATURALLY ADRESSED BY MANY MAJOR BRANDS (EXCEPT FOR LUXURY)

Beauty, wellness and cooking topics are amongst the target's preferred topics; **this is a terrific opportunity** for brands whose products & services are part of the landscape for those topics

TARGET-SPECIFIC YOUTUBE INTERESTS

• BEAUTY :

- Cosmetics
- Hair
- Hairstyle
- Nail
- Foundation
- Long hair

• COOKING

- Ice cream
- Recipe
- Cake
- Chocolate

• FASHION

- Fashion

• SPORTS/WELLNESS

- Physical exercise
- Yoga



MAJOR BRAND VERTICALS

• BEAUTY BRANDS

- L'Oréal Paris
- Paco Rabanne
- Gemey-Maybelline
- CoverGirl

• FOOD BRANDS

- Milka France
- Perrier

• FASHION BRANDS

- Victoria's Secrets
- Kiabi.com
- Lacoste
- NafNaf Paris

• LUXURY BRANDS

- Christian Dior
- Louis Vuitton
- Chanel
- Giorgio Armani

PERFORMANCE ON YOUTUBE: BRANDS ARE WAY BEHIND UGC AMONGST BRANDS, THE BIGGEST SPENDERS ARE NOT THE MOST PERFORMING



Organic or natural views, as opposed to paid views (ads), are views generated by subscribers or visitors voluntarily. “Engaged” views are those for which the viewer reacts to the video, i.e. for which viewers have liked or commented the video.

Natural views and engagement rates are a strong indicator of video performance on YouTube : natural views increase reach of paid campaign beyond paid views, and demonstrate the quality/relevance of a content. They also generate engagement which has a strong impact on brand memorization, while paid views, by nature, do not generate engagement.

Brands usually have the **highest average views per video** (size of the dots). However, their performances as measured by **natural views per video**, and **engagement rate** are **much lower than Youtubers**, despite the big paid media investments behind the videos.

The brand with the higher engagement rate in France is **Gemey-Maybelline**, which works closely with Youtubers. The brand with the highest number of natural views per video (worldwide) is **Victoria's Secret**, thanks to its fitness and bathing suit contest series.

TOP SPECIFIC INFLUENCERS IN 25-44 BRACKET: IT'S VARY ACCORDING TO AGE GROUPS

BRANDS MAY NEED TO SEGMENT THEIR INFLUENCER PARTNERS ACCORDING TO AGES

Brands need to identify influencers which are influent with the brand's target audiences and/or have same content interests than brands:

- **Demography specific influencers** have a much higher proportion than average concentrated on a specific **demography**: partnering with them concentrates the impact of the views they bring on the target.
- **Content specific influencers**, for example food channels or "beauty" youtubers, often seem like natural fit for some brands, but they can have very different demographics, from 13 to 55. Also Youtubers have recently been a lot more eclectic in their choices of topics, with many women creators having a mix of fashion, beauty, lifestyle and fitness on their channels.

The best partnership approach for a brand is thus probably to select youtubers **first on the base of their audience demography**, then, inside the list, based on their **formats and content interests**.

Nota Bene : "Big" youtubers, as for instance EnjoyPhoenix, Emmy or Sananas, although doing lots of views on this demo, have as well lots of views coming from other age groups : these youtubers are less "demo-specific" (their audience are larger).

TOP SPECIFIC FRENCH INFLUENCERS 25-34 WOMEN

Sissy MUA	Fitness
GeorgiaSecrets	Beauty
Push Your Pink	Beauty
Tartofraises nail art	Beauty
Makeupbygiulia	Beauty
Le Meufisme	Comedy
KayEhHey	Beauty
Eimadolly	Beauty
camillegrandxo	Beauty
Djulicious	Beauty

TOP SPECIFIC FRENCH INFLUENCERS 35-44 WOMEN

Soso Latina	Beauty/ Fitness
Cherry Nail Art	Beauty
Sissy MUA	Fitness
Nadiya B	Beauty
Hervé Cuisine	Cooking
Ma fleur d'oranger	Cooking
Tartofraises nail art	Beauty
Noemiemakeup touch	Beauty
Elsalifeandvlogs	Vlog
Shiu Li	Vlog

CONTENT & FORMATS : BRANDS SHOULD NOT LIMIT THEMSELVES TO BASIC FORMATS

	BEAUTY	FASHION	COOKING	LIFESTYLE	SPORTS/ WELLNESS	MUSIC
YOUTUBERS	<ul style="list-style-type: none"> - Haul - Tutorial - Routine - GRWM (Get Ready With Me) 	<ul style="list-style-type: none"> - GRWM - Haul - Review - Tutorial - Look book 	<ul style="list-style-type: none"> - Recipes 	<ul style="list-style-type: none"> - Vlog Face Cam - Vlog Board Cam 	<ul style="list-style-type: none"> - Workout Lessons - Health Tips - Recipes 	<ul style="list-style-type: none"> - Song review - Choreography - Cover
BRANDS	<ul style="list-style-type: none"> - Haul - Tutorial 	<ul style="list-style-type: none"> - Tutorial - Review 	<ul style="list-style-type: none"> - Recipes 	/	<ul style="list-style-type: none"> - Workout Lessons 	/

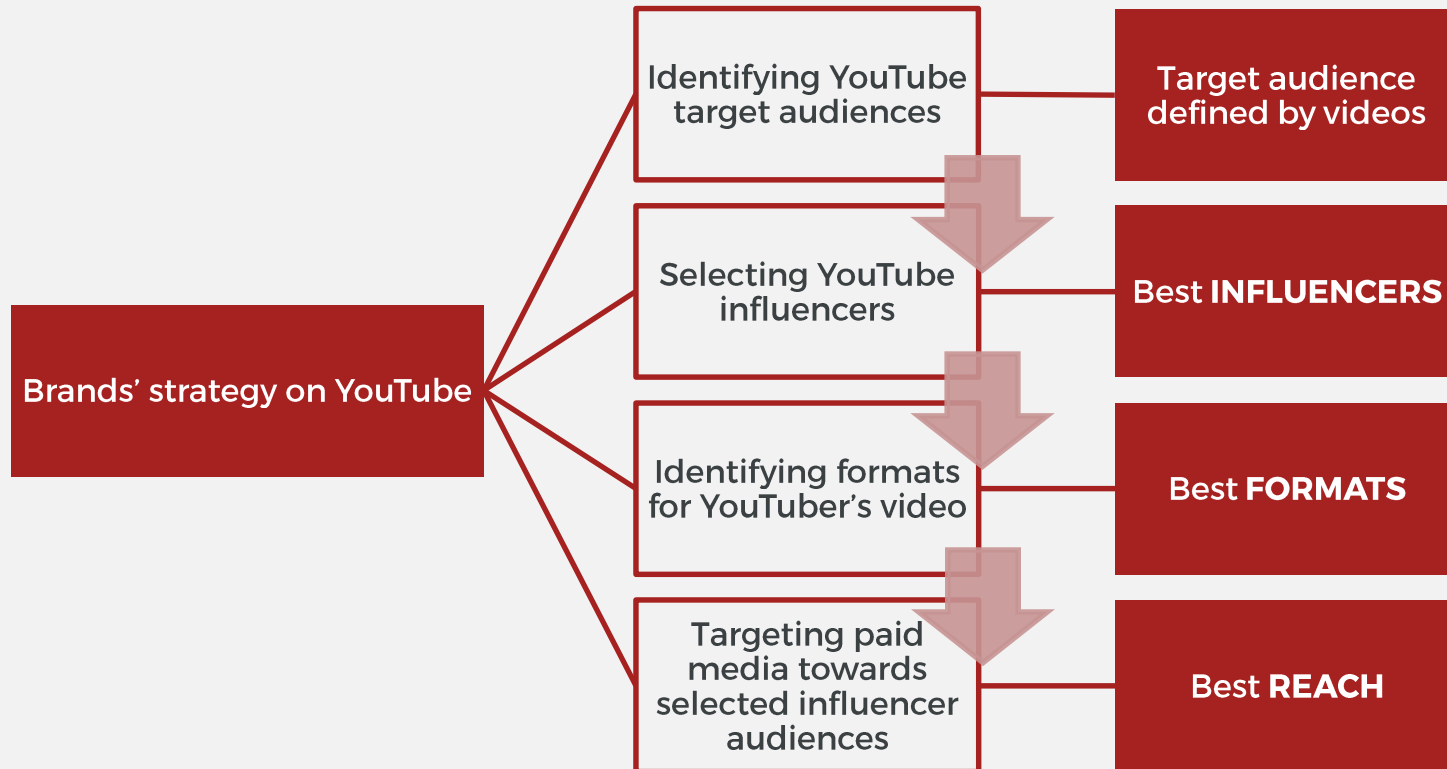
Main video formats currently used by YouTube creators and Brands

Looking at UGC videos show that Youtubers have invented a wide-range of brand-friendly formats, since they demonstrate more creativity and a great capacity to have new ideas that appeal to their viewers.

Any formats used by YouTubers can be used by Brands, providing multiple formats opportunities for Brands.

Branded content operations by Youtubers keep the same formats as the Youtubers on their personal channels, thus attracting the Youtuber's community on the brands' channels.

BRANDS' STRATEGY ON YOUTUBE : THE PROCESS IN 4 KEY STEPS



REACHING FRENCH 25-44 WOMEN ON YOUTUBE : **A TARGETING AND ENGAGEMENT CHALLENGE**

Knowing and using the audience's content interests and influencers provides a powerful way to improve returns on YouTube investments

French 25-44 women audience is a difficult demography for Brands to comprehend, due to fuzzy analytics (cookies on devices used both by them and their kids) and platform specific content and format (videos posted in YouTube are far different from TV ads).

But investing on YouTube is well worth it for Brands targeting this demography : not only is the segment well present on YouTube, but the audience also interacts with content a lot more than on TV, and the type of videos which they watch are well suited to brand integration. Partnering with the right creators in the influencer community is thus a powerful way of better engaging its audience, and generating earned views with the Youtuber's or the Brand's community.

The relevance of **influencers for each brand and the performance of the video formats they create can be measured to provide an excellent guide to Brands on whom they should be partnering with, and with which kind of content.**

For Brands, common factors in successfully engaging the demography on YouTube are thus partnerships with the right Youtuber - the influencer with the relevant audience, able to integrate the brand in one of his formats - with a reach then augmented thanks to a YouTube media campaign.

Our content, influencer, and brand presence study shows that, given considerable investments made by brands on the target demography, there are still **huge opportunities of improving the ROI** of most of them through better targeting, influencer partnership, and overall brand channel optimization.

AGENDA

CHAPTER I- HOW BRANDS CAN REACH FRENCH WOMEN AGED 25-44

- A. Influencer partnerships and paid media: how they impact brand metrics
- B. Why audience knowledge is key for influencer partnerships and paid media optimization

CHAPTER II- WHAT 25-44 FRENCH WOMEN WATCHES ON YOUTUBE

- A. Which topics do they prefer on YouTube ?
- B. Which topics are specific to 25-44 women on YouTube ?
- C. Brand videos vs. UGC: the audience split

CHAPTER III- WHO DO WOMEN 25-44 WATCH ON YOUTUBE ? CONTENT-SPECIFIC INFLUENCERS

- A. Beauty
- B. Music/Entertainment
- C. Cooking
- D. Lifestyle
- E. Sport & Wellness
- F. Fashion

CHAPTER IV- WHO DO WOMEN 25-44 WATCH ON YOUTUBE ? DEMOGRAPHY-WIDE INFLUENCERS

- A. Influencers on 25-44 demography
- B. Influencers on 25-34 and 35-44 demography

CHAPTER V- HOW DO BRANDS POSITION THEMSELVES ON THE TARGET DEMOGRAPHY ?

- A. Brands connection with the audience: organic lift
- B. Luxury
- C. Beauty
- D. Food
- E. Fashion

CONCLUSION

HOW BRANDS CAN REACH 25-44 WOMEN : **LEVERAGING AUDIENCE KNOWLEDGE**

Knowing what the brand audience watches, who they watch
and what competitors do, is key to connect with them

REACHING 25-44 WOMEN ON YOUTUBE : OPTIONS FOR BRANDS

Paid Media, Influencer Partnerships, Brand Channel Development : each play a part for brand connections with its audience

Paid Media campaigns have traditionally been the easiest way for brands to use YouTube's vast reach to address their target audiences, either through bidding process on adwords, using in particular the TrueView preroll format (skippable ads), or Reserved ads on a CPM basis directly through Google Sales teams. Ads used by brands can either be video ads created for other supports (TV, for example), or specific videos.

Partnerships with YouTube Influencers can complement the Paid Media campaign in two ways: having a YouTube influencer create a **Brand Content video** will mean more engaging videos, since influencers are **YouTube natives** and know how to address YouTube audiences. It also means a chance, on top of the paid media campaign, gaining natural views with the YouTuber's community on and off YouTube.

The most accomplished way of leveraging all YouTube tools **is for a brand to develop its own channel**, by regularly producing and publishing videos on its channel(s). Coupling this with media campaigns and influencer partnerships will entail high subscriber growth, thus resulting in strong incremental natural views and higher engagement. The YouTube Creator Playbook for Brands describes in detail the optimizations and Best Practices for channel development.

Top brand performers use Paid Media & Influencer Partnerships to boost Channel Development

GoPro, NYX in the US, Gemey-Maybelline in France have thus built strong brand channels

LIFTING BRAND METRICS WITH INFLUENCER PARTNERSHIPS AND TARGETED PAID MEDIA : **REACH, ENGAGEMENT & WATCH TIME**

Native YouTube influencer content + targeted paid media lift KPIs for campaigns and channels

Engagement and total watch time show how well a brand connects to its target audience

Audience engagement on YouTube can be measured by the ratio of comments & likes to views, for a video or a group of videos. Total Watch time per visitor is number of videos viewed per visitor, times watch time per video.

Both engagement and watch time benefit greatly from **using native content created by YouTubers** vs. more traditional forms of content. Paid media should promote native content, and aim at promoting video series vs. single videos.

Reach on YouTube can be optimized with earned views and targeted paid media

Native YouTube content also improves total reach by adding earned views to paid views, and by connecting with the YouTuber's community.

Furthermore, targeting specific audiences with paid media also enables higher earned views on brand videos.

ENGAGEMENT	<ul style="list-style-type: none">• Production : native YouTube content• Paid media : promotion of native YouTube content vs. traditional ad
WATCH TIME	<ul style="list-style-type: none">• Native YouTube content production• Higher watch time through paid media promotion of video series vs. single video
REACH	<ul style="list-style-type: none">• Higher earned views thanks to influencer community• Paid media targeting towards complementary audiences

OPTIMIZING THE USE OF INFLUENCERS AND OF PAID MEDIA TARGETING MEANS KNOWING WHAT YOUR AUDIENCE WATCHES AND WHO THEY WATCH

Audience knowledge is indispensable to select the right content & right influencers

Audience interests & influencers are present in all steps of brand development

For a brand, identifying target audiences is the first fundamental step. The target can be defined by either demographics or profiles, or by specific content interests (e.g. cooking, cosmetics..).

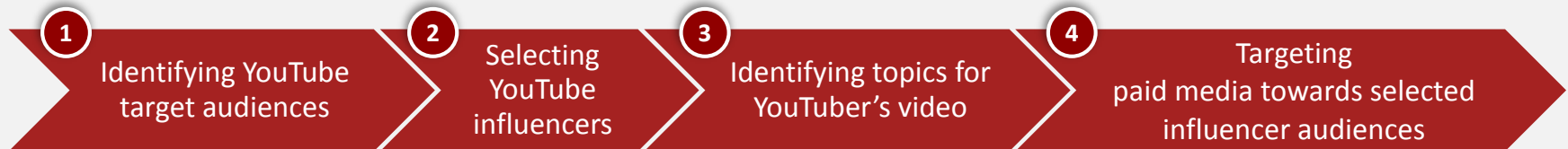
Then, YouTube influencers should be selected according to relevance to the target: either by **relevance of the YouTube audience to the demography/profile** – Wiztracker™ tool can determine the best influencers – or **YouTubers best placed in specific content verticals**.

The next step for the brand is deciding whether it wishes for the content to include specific topics, or leaves the influencer to integrate the brand in whichever topics suit him; most brands combine both brand-related topics with trending topics.

Finally, targeting paid media towards selected influencer audiences can generate higher results; this particularly true for our target demography of French women aged 25-44.

20X ENGAGEMENT
4X WATCH TIME

Gemey-Maybelline's « T'as pas du Gloss » with youtuber EnjoyPhoenix generates, per Wiztracker stats, same number of views per video than previous tutorials, but with 20 times engagement rates (40 % vs. 2 %), and 4 X watch time per video (6 minutes vs. 1,5 minutes).



AUDIENCE KNOWLEDGE **MATTERS ALSO FOR PAID MEDIA TARGETING** ON THE ELUSIVE 25-44 WOMEN DEMOGRAPHY

Mixed device usage between kids & moms, and varied content interests, means a need for specific, content-data based, ad targeting

Additional targeting : on specific content or on the audiences of specific contents

Mixed device usage on YouTube between kids & moms means that targeting viewers on YouTube **based on connection or cookies only-data can be misleading**. A child identified by his mother's ID can thus be targeted by a beauty-product ad, as well as a child which is using a device previously used by his mother (cookies). As a reminder, more than 43% of views of the demography identified by connection ID can be attributed solely to kids, to which can be added a portion of the views of « generic » topics. To filter out kids, **adding a layer of content targeting** – i.e. for example eliminating kids-based contents as possible destinations for pre-rolls- can thus improve targeting.

The varied content interests of the demography, as indicated by the analysis of topics viewed, are also a challenge for brands looking to connect to viewers. For example, a brand might want to specifically target viewers which have watched videos on original lipstick colors. Targeting just pre-rolls on just those videos which, for example, show how to make lipstick out of Crayolas, would mean a very small reach for the campaign. **Using remarketing lists for those videos is much more efficient** in terms of reach, by targeting the audiences of these video wherever they are on YouTube.

✓ **Excluding topical videos/channels from ad campaign helps filter out kids**

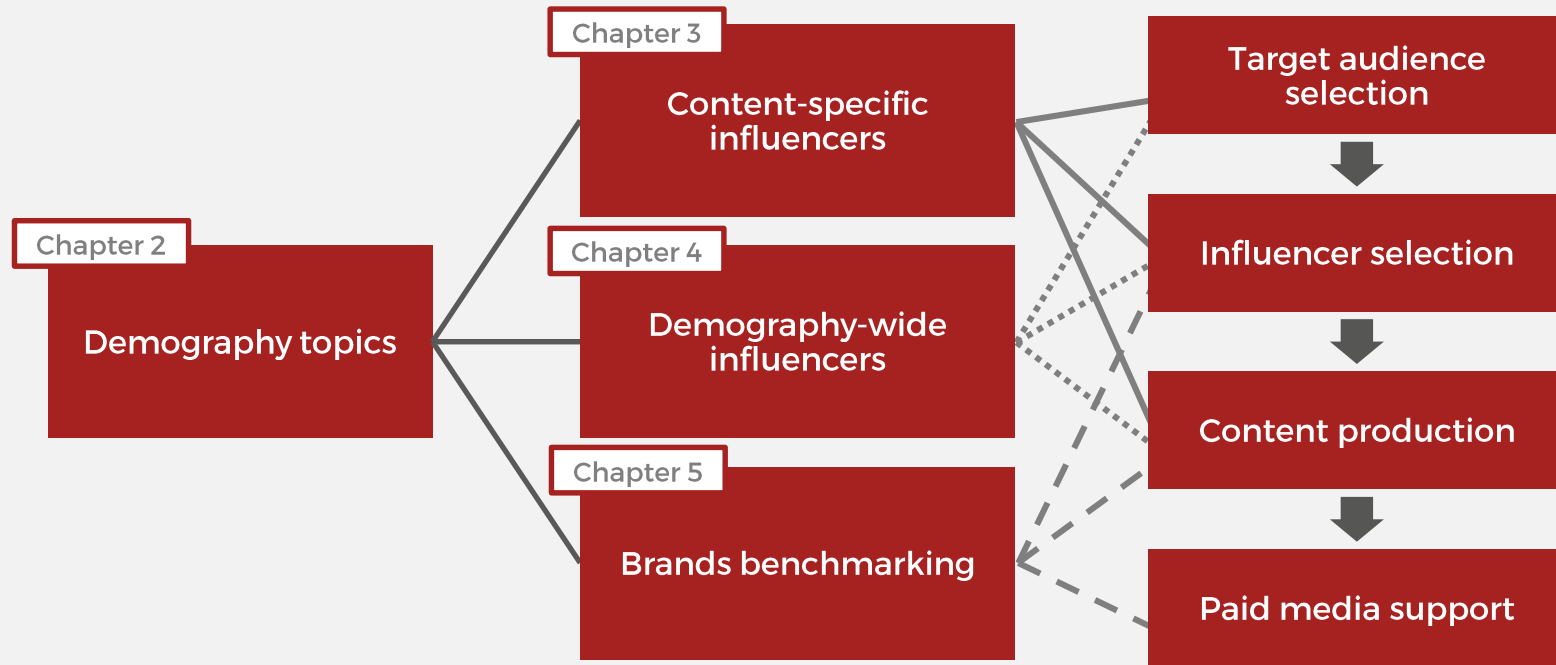
✓ **Retargeting audiences based on specific video or channel lists boosts campaign performance**

Over 2X acquired views by retargeting specific audiences

Wizdeo managed ad campaigns for channels and video series have shown strong results in terms of higher acquired views and acquired subscribers

AUDIENCE KNOWLEDGE HIGHLIGHTS AND HOW IT IMPACTS BRAND AUDIENCE DEVELOPMENT

Topics, influencers, and competitors analysis : this study's chapters



WHAT **25-44 FRENCH WOMEN** WATCH ON YOUTUBE

Which contents are preferred and specific for the demography ?

WHAT DO FRENCH WOMEN WATCH ? SIFTING THROUGH THE CONFUSING DATA

Identifying specific viewing interests in order to better target them

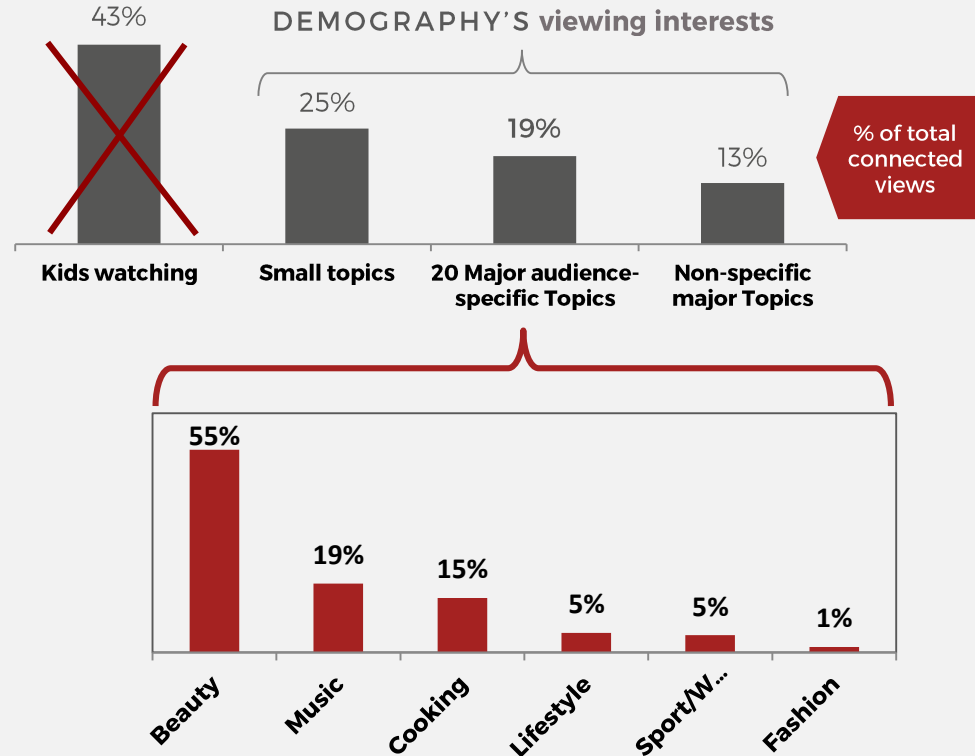
Correcting the “kids” bias: YouTube analytics demographic data is available for women aged 25-34 and aged 35-44. However, data gathered by YouTube is based on views made with audiences’ connected accounts, which includes a big chunk of views made by kids using their mom’s accounts. **We have thus put aside “kids” topics** either very strong in the 13-17 demography (ex. Minecraft) , or specifically associated with kids viewing habits (animation characters).

Setting aside topics too small in views: with less than 0,2% each of overall views, they represent 13% of total.

Of the remaining statistically relevant topics:

40% are topics not specific to the target: topics for which women 25-44 represent less than 150% of their average weight in all YouTube audiences. They include music videos (covers), or generic all-audience stars (Norman..).

20 major audience-specific topics represent 60% of this ensemble: for those, women represent over 150% of their average weight in audiences. They belong to six main verticals: beauty, music, cooking, lifestyle, sport-wellness and fashion.



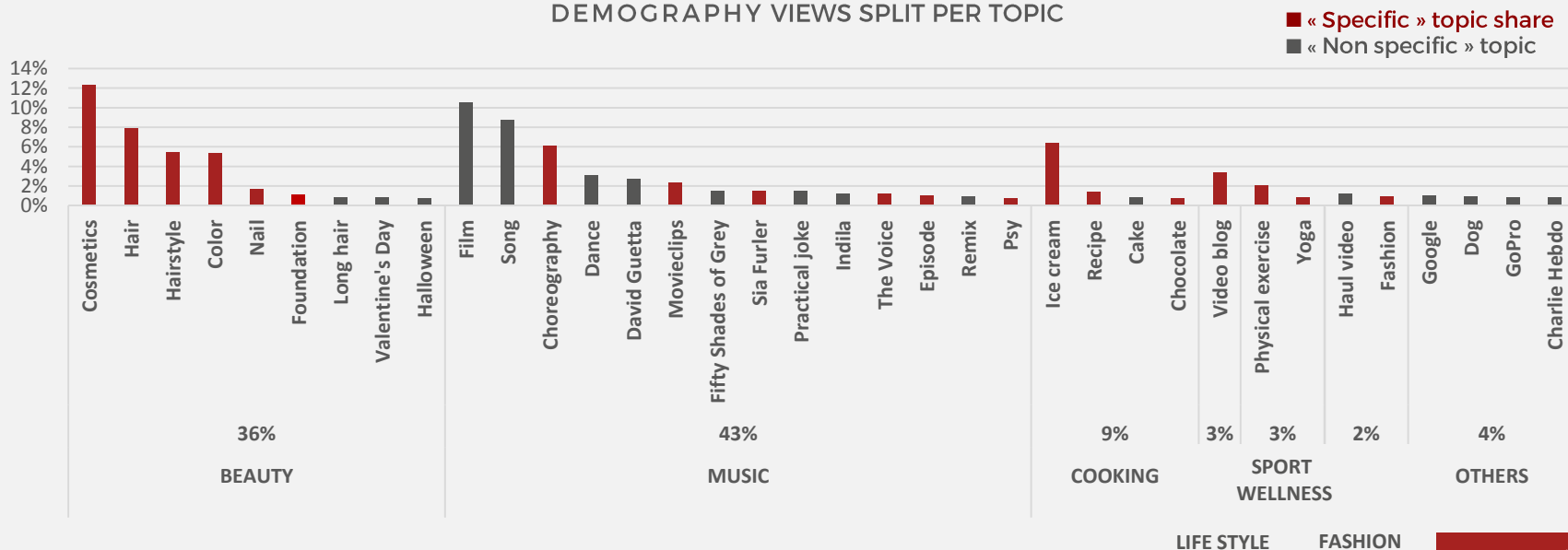
TOPICS PREFERRED BY THE TARGETED DEMOGRAPHY: 55% SPECIFIC, 45% GENERIC

Specific topics are those for which the target demography represents more than 1,5 X of its weight

43% of the videos watched by 25-44 women on YouTube are Music/Entertainment, followed by Beauty videos 36%. Cooking is far behind 9% and Life style, Sport/wellness and Fashion are very small (between 2 and 3%).

However, more than half of views are made on topics specific to the demography: singers (Sia, Indila...), film/show (Fifty Shade, the Voice, ...) videos or clips : YouTube is, for this demography, a source of entertainment. YouTube is also a way to get tips about Beauty subjects : routine, tutorial for daily use or special events (Valentine's day, Halloween).

DEMOGRAPHY VIEWS SPLIT PER TOPIC



IDENTIFYING TOPICS SPECIFIC TO FRENCH WOMEN 25-44 : FROM YOGA TO PSY

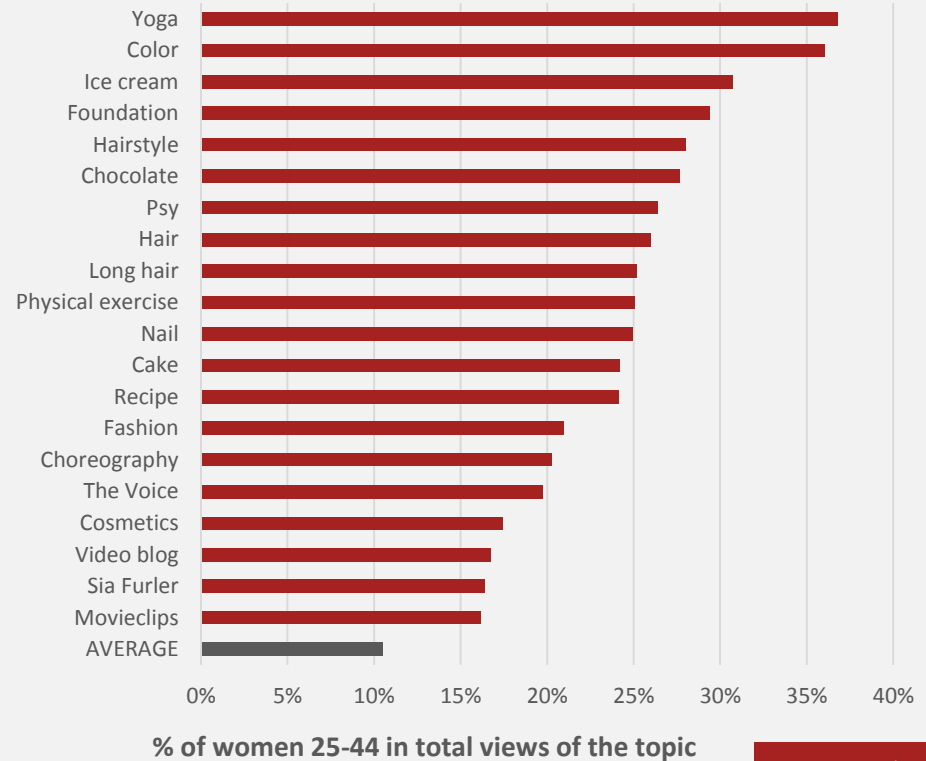
20 specific topics represent in total 60% of major viewing interests of the target demography

The topics listed represent more than 0,2% of total views by the demography in the last 3 months. They are “specific” for French 25-44 women because they concentrate this demography, which represents for each topic more than 1,5 X of its average weight in YouTube. Since women 25-44 represent on average 10% of YouTube views, the demography represents over 15% of the topic views.

Topics can be sports, (yoga), specific or generic products (chocolate, foundation), body parts, people (Sia Furler), or even generic channels (Movieclips, trailer channel).

While some of these topics may not seem surprising, like Yoga or recipes, topics like Psy were not expected...since the views from videos are from French-based channels.

The part of the demography goes from 17% (Movieclips) to 37% (Yoga), so none of those topics are 100% specific. However, together, they represent 60% of major topics views: this means that **top YouTubers for those topics are specific influencers to this demography. And also that YouTubers whose audience is the same than those videos audience are influencers to this category.**

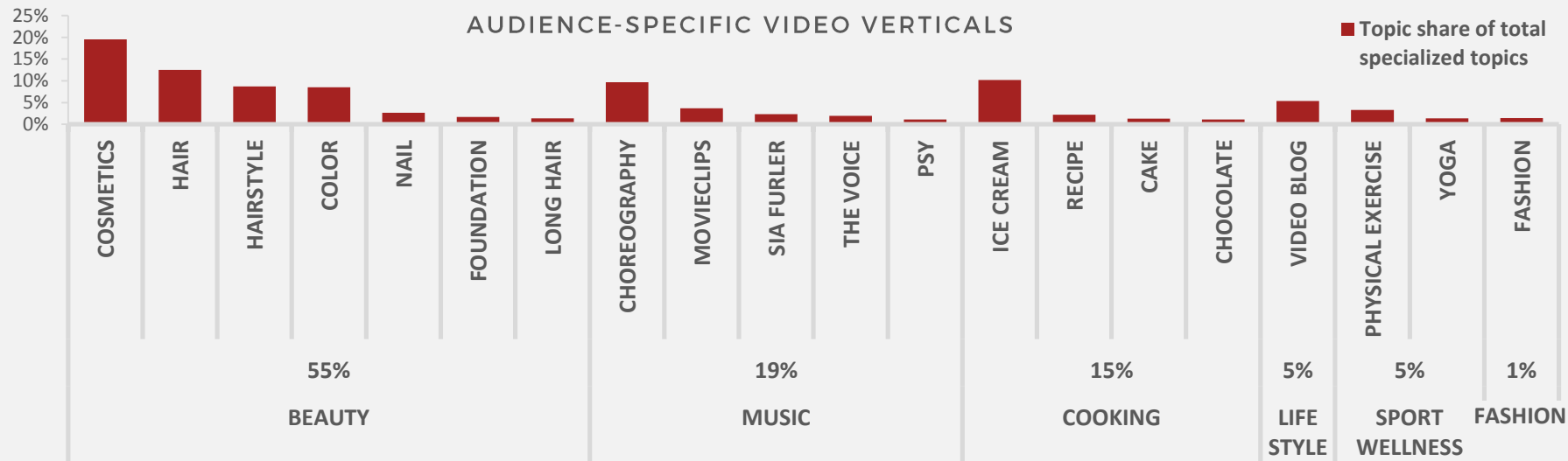


SPECIFIC TOPICS WHICH DIFFERENTIATE 25-44 WOMEN : MOST VIEWS IN BEAUTY TOPICS

Beauty topics represents 55% of specific topics, followed by Music & Entertainment and Cooking .

The 20 major specific topics are regrouped in 6 verticals. The split is representative of specific viewing habits of the demography : **Beauty** is the biggest specific vertical, with Music, and Cooking far behind at 19% and 15%. The remaining verticals (Lifestyle, Sport/Wellness and Fashion) represent in total only 11% of the targeted audience.

Viewing concentration on YouTube results from natural interests of the demography, but also volume of YouTuber output: for example, the big difference between “Beauty” and “Fashion” verticals is linked to a smaller number of “Haul” videos created – more expensive - vs. make-up videos. Indeed, on similar channels, those 2 kinds of videos have the same amount of views and engagement per video.

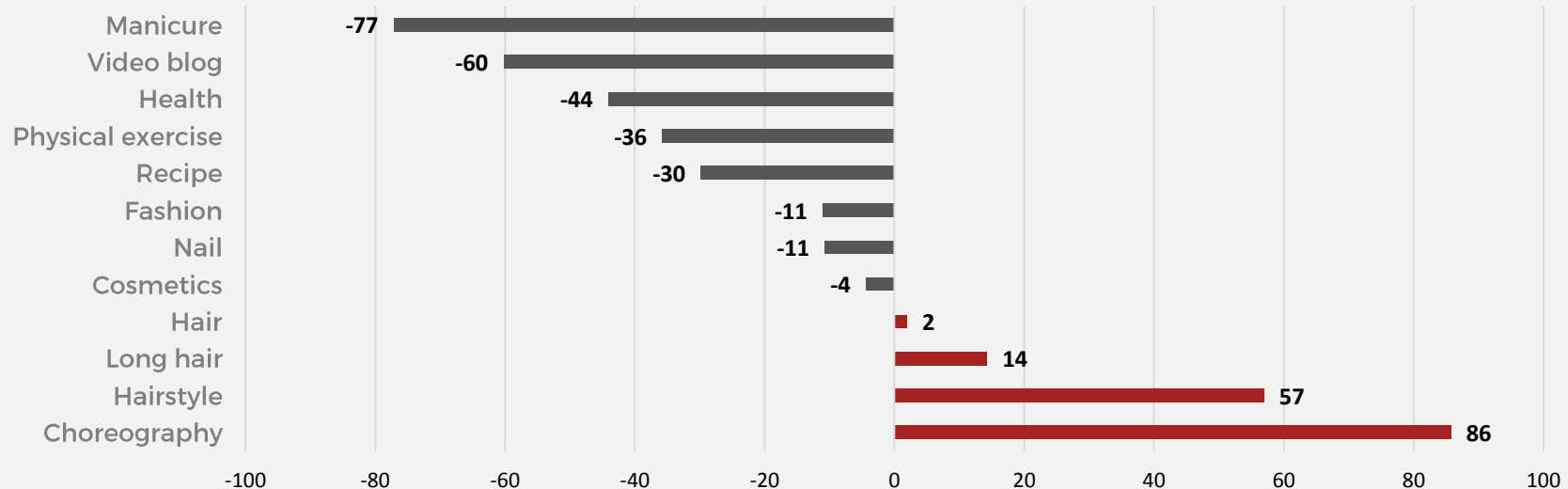


TRENDING MATTERS: RELATIVE VIEWING VARIES STRONGLY FROM MONTH TO MONTH

In April 2015, women 25-44 are more likely to watch YouTube videos on choreography than on manicure

Before taking a decision on a topic for a video, by, amongst other factors, looking at trending topics, the variability of viewing patterns must be taken into account. Views per topic can vary considerably from month to month, because of events and news outside YouTube, but also function of trend-setting on YouTube by major influencers. Analysis by WizTracker™ Trending Topics for April 2015, for specific topics for French videos show variations between -77% to + 86%.

SAMPLE OF TOPICS: APRIL VS. MARCH 2015 TRENDS IN VIEWS (%)



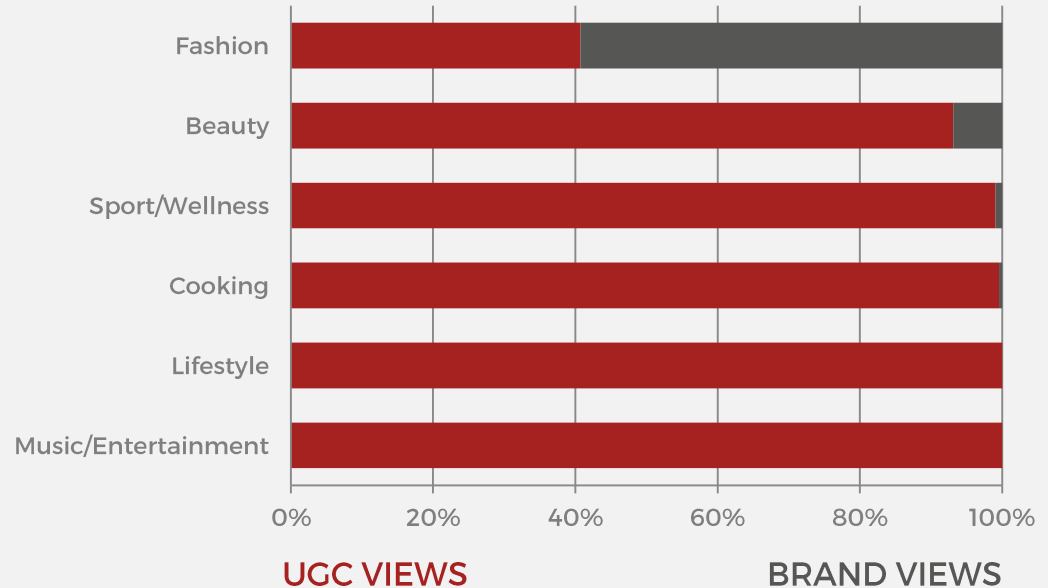
BRAND VS. UGC VIDEOS ON TOP DEMOGRAPHY TOPICS: **BRAND VIEWS STILL IN MINORITY**

Even with paid media promotion, brand views are still a minority

Graph shows views made on brand channels by videos uploaded in the three months between 12/15/2014 and 03/15/2015, during their first 30-days after uploads. Brand views include all organic and paid views, while UGC videos by Youtubers are all only organic and natural.

The wide differences in the share of Brands can be explained first by the difference in the amount of Youtuber output on different verticals: it is quite poor in the case of Fashion, for example, so the % of brand views is much higher.

On the opposite, brands targeting women 25-44 find it **difficult to integrate their brand in content topics such as Lifestyle** - generally Vlogs relating the life of a personality - or **Music videos**, even though those videos are viewed as much or more by the target demography than Fashion or Beauty: no brands, in the period, published any content in this vertical.



Uploads December - March 2015

TOP CONTENT-SPECIFIC YOUTUBE VERTICALS & INFLUENCERS

**Influencers which can help brands with specific content:
Beauty, Music, Cooking, Wellness, Lifestyle, Fashion**

CONTENT-SPECIFIC OR DEMOGRAPHY-SPECIFIC ? **TWO POSSIBILITIES FOR BRANDS**

Selecting specific topics for its content production can be part of a brand's objective

If the brand feels it needs specific content, it should choose top influencers in those topics

Many brands targeting the 25-44 women demography find it obvious to create content whose topic includes their own product. Cosmetics brands easily warm to the idea of doing cosmetics tutorials with their own products, food companies of producing recipes with their own products, which in both cases can lead them to connecting with the top influencers on those topics. Successful such campaigns have been run in France, as the recent Knorr campaign with Hervé Cuisine-made recipes, or the Enjoy Phoenix-campaign for Gemey-Maybelline channel, and many ad campaigns on YouTube are targeted on these topics through keywords or affinities – albeit less through retargeting.

The analysis in the next pages helps these brands verify which topics are preferred by the demography, as well as the top influencers on these topics.

Even though such a familiar option is easy, it has its drawbacks. First, for a number of brands, **products don't fit in the demography's most popular topics**: for example decoration –very few YouTubers have the means to do those videos- or non-fitness health. Second, selecting specific topics and their influencers, rather than influencers targeting the whole demography means touching a relatively narrow part of the demography. Third, it is harder to do story-telling around product-centric videos .

Thus the second option, covered in chapter 4, is for the brand not to look for a specific topic, but to use more generic content made by influencers who address the wider demography; one good example is for example Lovoo with top youtuber LufyMakesYouUp speaking to a wider audience.

OPTION 1:
product-friendly,
specific content &
influencers

OPTION 2:
demography-wide
content

ANALYZING CONTENT VERTICALS FOR FRENCH WOMEN BETWEEN 25 AND 44: TOPICS, FORMATS & INFLUENCERS

Ranking of influencers base on average first 30-day views of recent videos

First 30-day views for each uploaded video represent influence better than total subscribers or total views on last month.

The **3-part analysis** of each vertical starts by an **analysis of the topics** inside each vertical; then continues with **an analysis of the formats** used by the YouTubers for each vertical (brand videos are not included at this stage). Formats are the genres of videos, for example tutorials or haul videos for the beauty verticals.

For **influencer identification**, the first step is **to filter in the most specialized channels on each vertical**, i.e. channels who published the most videos on the topics of each cluster compared to their total uploads, for the period between 12/15/14 and 03/15/15. Channels who have a dominant topic which is specific to another audience have been deleted.

For each vertical, YouTube specialized channels are then ranked by average video views on first 30 days after upload. **This can be quite a different ranking from the total subscriber ranking, or even the total views on last month since some channels don't upload often.** This is the most relevant KPI for brands who seek to understand how much influence a given youtuber may have in total: subscriber numbers can be particularly misleading for youtubers who have failed to keep the loyalty of their YouTubers by either not uploading regularly, or changing subjects.

Average views/video on first 30-days is the best influencer KPI

BEAUTY VIDEOS: 50/50 SPLIT BETWEEN COSMETICS AND HAIRCARE

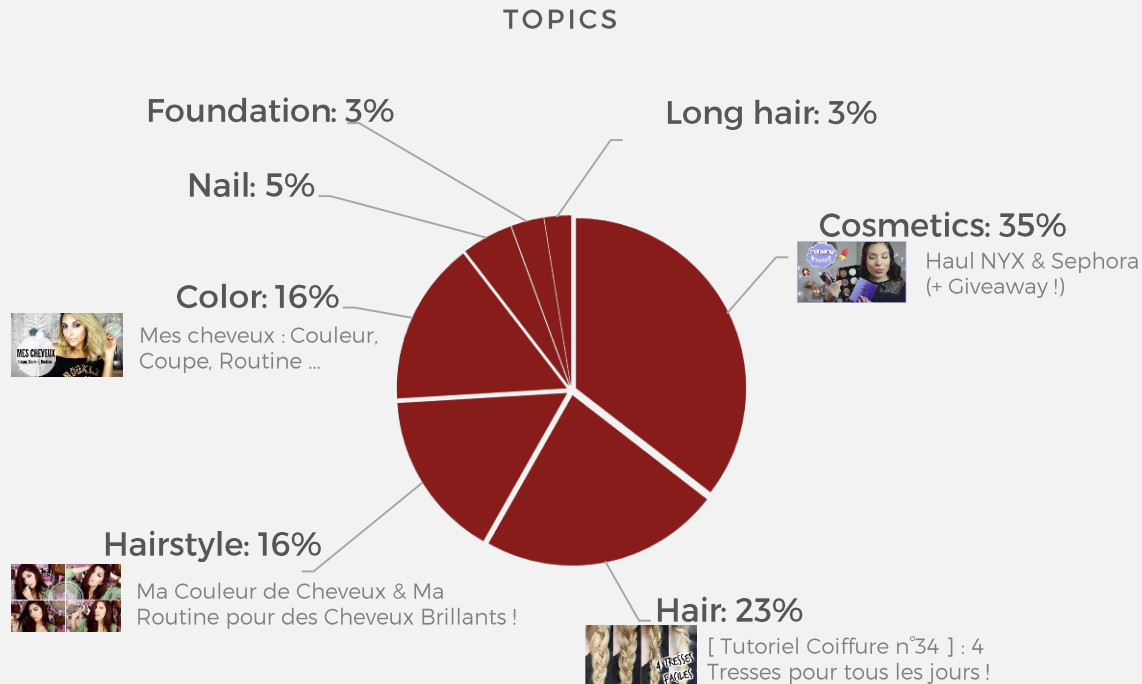
Many beauty videos are product-centric: facilitates brand-content operations with YouTubers

Major topics in beauty videos divide themselves roughly between cosmetics and hair, with a small part focusing on nails.

Cosmetics videos are very much product-centric: lipstick, eyelash, foundation.. with advice on how to use it and often feedback on the product quality. Nail-art videos are also quite product-centric.

Hair related topics are less product-centric, with many tutorials on hairstyle.

While the product-centric nature of those videos might facilitate product integration for brands, the audiences of these influencers increasingly expect them to be transparent about whether their video is sponsored by a brand or not.



BEAUTY VIDEOS FORMATS: **SPEAKING DIRECTLY TO THE AUDIENCE**

No fiction: Haul and Tutorial are the most popular formats for beauty videos, in France as in the rest of the world

Most of the time, beauty YouTuber girls film themselves in a room –generally their own bedroom- in front of the camera, with a fixed shot. As they evolve and gain subscribers, and more revenues, they may do videos with friends, or have a cameraman which shoots from multiple angles.

2 formats are mostly used by YouTubers : first, **Haul videos are a presentation of beauty products** that have been bought by the YouTuber; she gives her opinion about the products and tips on how to use it. **Tutorial videos are “how to” videos** where the YouTuber films herself doing hairstyle, manicure or make-up and explains her technic to the audience.

Some more minor formats show up: **“routine”** – ex. everything they’re doing for their hair or their skin- and **“GRWM” (Get ready with me)** which presents a complete set-up (hair, clothes, skin, food,...) for a particular day (school, Valentine’s day,...).

These formats can be and are used for brand content video for beauty products, with 2 constraints:

- use formats with which the YouTuber is familiar
- preserve her authenticity by letting her create the video



Tutoriels coiffures -
Simples & Rapides



Mon TOP 5 ..
KIKO - Horia

INFLUENCERS FOR BEAUTY VIDEOS : INCLUDE MOST OF **TOP FRENCH WOMEN INFLUENCERS**

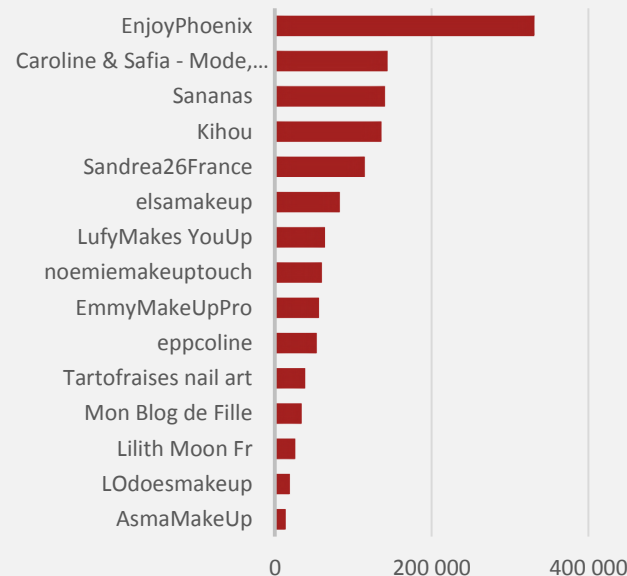
Beauty topics have created some of the top French YouTubers

No surprise: none of the major influencers in this group are men, and most are quite young, under 30. **They aren't specialized on one topic.** They upload videos on Hairstyle, Nails, Skincare..., and they also **upload videos on other subjects** like Fashion but are mainly focused on Beauty.

It is worthwhile to note that this list comprises 3 of the 10 biggest YouTuber women in France, the other 7 being comedy YouTubers, whose audience is less focused on the 25-44 female demography : Natoo, Andy Raconte...

This success is undoubtedly due to the relative facility with which videos can be made on Beauty topics, vs. fiction and comedy, with for example less need for story-telling & script.

BEAUTY INFLUENCERS IN FRANCE



■ First 30 days views/video on the cluster

EnjoyPhoenix is by far the top influencer in the Beauty universe

Her videos gather more than twice views than Caroline & Safia, the 2nd influencer on this cluster. She provides advice to her fans who considers her as her big sister

MUSIC/ENTERTAINMENT FRENCH VIDEOS: CHOREOGRAPHY, COVERS AND TRAILERS

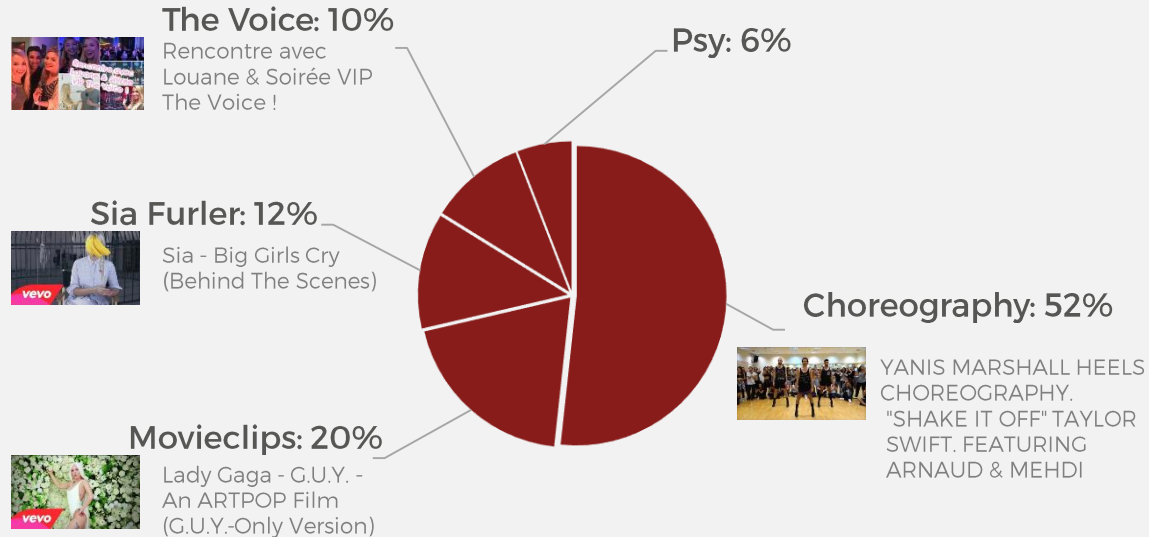
Both professionals and amateurs in the music/entertainment topics

The choreography topic is composed of dance performance videos made by professionals and also amateurs mostly on popular songs. It is of course a more generic topic englobing many artists, which explains the gap with the other topics like Psy which are of course more specific.

The second topic, Movieclips, is composed of trailers of latest movies: apparently, the demography's viewing is more focused on film trailers than other audiences, probably due to less consumption of original YouTube content, but maybe also because of Kids consumption.

Other topics are all Music related with artists, songs or programs about music, with covers or live performances of famous songs. Views are highly dependent of music trends especially for artists and songs.

MAJOR MUSIC/ENTERTAINMENT TOPICS



MUSIC/ENTERTAINMENT FORMATS : **DANCING AND SINGING**

Choreography videos and song covers amongst preferred videos

Dance channels mostly upload **choreographies with several dancers**. The format is often pretty simple with just one camera shot to show all the choreography, for example as Yanis Marshall does. Dancers use famous songs to make the videos discoverable on the YouTube search engine.

Most of these Dance channels are the property of dancers themselves but there are also collective channels.

There are also other Dance format like tutorials to learn choreographies with the detail of the dance moves and more sport related videos with dances like Zumba where the goal is to follow the YouTuber's moves.

Music channels use different formats, but, like Dancing, the most used are **covers of famous songs** which is the best way for them to be discovered on the platform. One of the most popular music format is of course music video clips published on artist channels -mainly VEVO channels- but since these are specific topics (artist and songs name only), they are too small to figure amongst major topics. Some professional channels upload **live performances** of French or international artists and also interviews.

These channels are not often use for Brand Content because of the **international audience** and the **difficulty of integrating a product**. But there are still possibilities to make the dancers wear some specific clothes to promote a brand or to ask an artist to make a cover to promote an album for example.



Guillaume Lorentz
// Uptown Funk //
Exclusive with
#CMRG // Hip Hop
Class



SUGAR - Maroon 5
(Adam Levine) -
Acoustic Cover
avec Tiwayo & LES
SOEURS COSTES

MUSIC/ENTERTAINMENT INFLUENCERS: **FRENCH DANCERS** AT THE TOP OF THE LIST

Their international audience boosts the ranking of French dancers

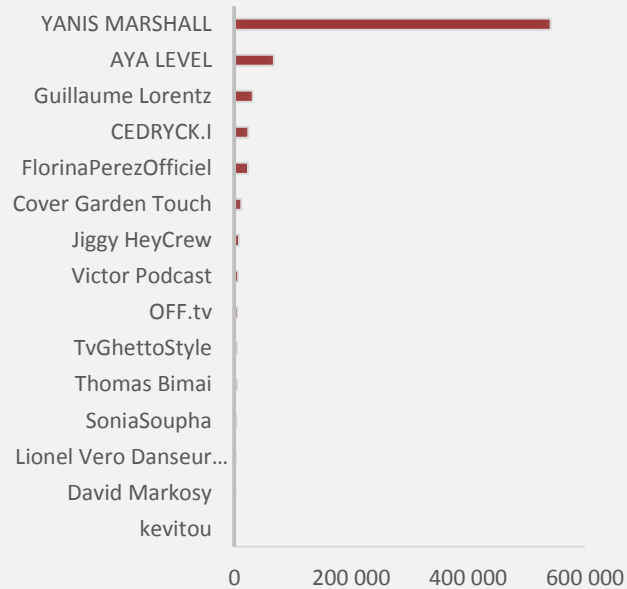
The top 15 biggest French influencers on Music/Entertainment are composed of mainly young men & women or collectives.

The two first influencers are **French dance channels** but their high viewcount is explained by their worldwide – as opposed to French-only – **audience**. There are also **Music channels with covers** of famous songs - and a bit of original content- for part of them.

There is a huge gap in term of views between the first the last channels.

For brands, partnering with these influencers may not be as easy as for beauty influencers – except for Yanis' high heels; also, if a brand is targeting the French market only, influence on French viewers will be a fraction of world-wide influence for an international YouTuber.

MUSIC INFLUENCERS IN FRANCE
ON THE DEMOGRAPHY



First 30 days views/video on the vertical (000s)

Yanis Marshall, dancer and choreographer, is an international YouTube star

His choreographies - he dances with high-heels- have been watched 10 times more than the 2nd influencer Aya Level. His popularity exploded as Britain's Got Talent 2014 finalist

COOKING VIDEOS: DESSERTS AND SWEETS FIRST

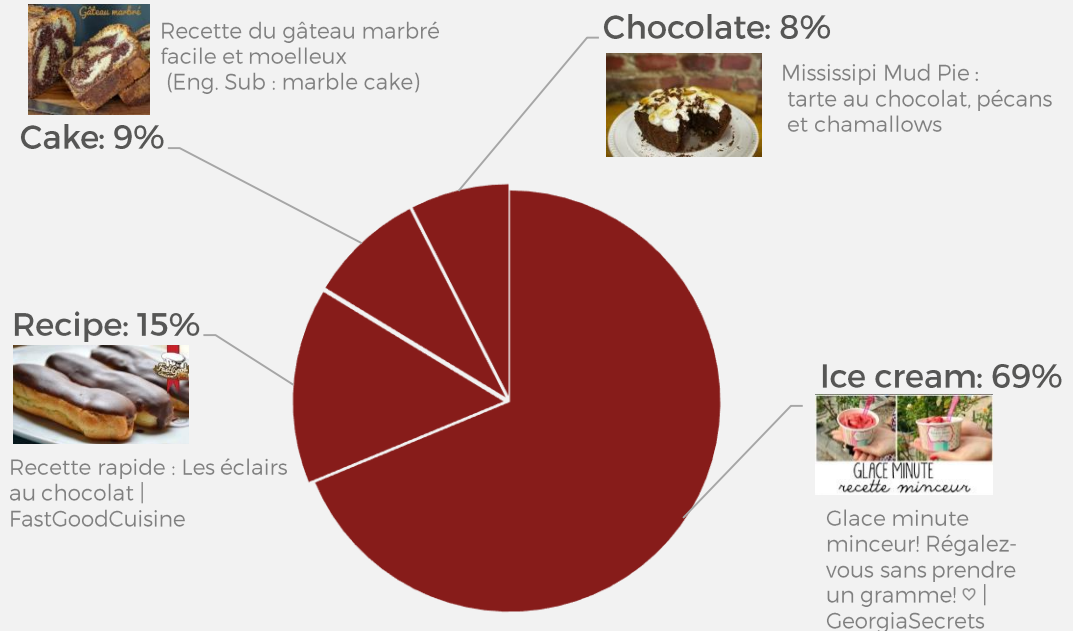
Ice Cream, Cake and Chocolate.. preferred topics for the demography

Ice Cream, Cake and Chocolate **topical videos** are most watched by the target. Videos use **mainly the recipes format** to learn how to make a dish or how to use an ingredient. These dominant cooking topics show how the demography is not mainly looking for main courses recipes but for **sweet ingredients which are fun to cook and to eat** and which often attract children.

Often, channels specialize in a type of recipes and mostly stick to it:

- classic recipes (Hervé Cuisine Videos)
- creative/popular recipes (FastGoodCuisine Videos)
- healthy or diet recipes (GeorgiaSecrets Videos)

MAJOR COOKING TOPICS



COOKING VIDEOS FORMATS: **RECIPES** MOSTLY, **MENUS** AND **ROUTINES** SOMETIMES

From step-by-step recipes to lifestyle videos

While many channels started with and have specialized in recipes, some cooking videos are uploaded by lifestyle-like channels for whom cooking is just a part of their general interests: some of those are beauty-focused channels, or video vlog channels. This tends to reflect on the formats used.

The **recipes format generally** includes a final result presentation, plus the detail of the different steps to follow to do the recipe. Some youtubers offer classic recipes but others shows more creative and fun ones like FastGoodCuisine.

Other formats, **used by women channels** include a **presentation of healthy food menus with wellness tips** or a presentation of the **food routine** of the YouTuber. The format can be similar to a classic recipe format but keeps health advantages at the center of the video. As opposed to North America, “trash-food” concepts such as the “Epic Meal Time” channel have never emerged in France....

Both recipes and menus/routines are used to make Brand Content videos with food ingredients or appliances. It is important for the brand to **choose the youtuber according to the format/message it needs to promote** : both types can struggle to get out of their comfort zone: beauty YouTubers to do recipes if they're not really cooking fans, and good cooks to do lifestyle-type videos.



Recette facile de la tarte aux légumes et fromage raclette



Une journée dans mon assiette | HIVER | + Recettes faciles | GeorgiaSecrets

COOKING INFLUENCERS: SPECIALIZED CHANNELS WITH RECIPES AND MULTI-TOPICS CHANNELS

Cooking vs Lifestyle channels

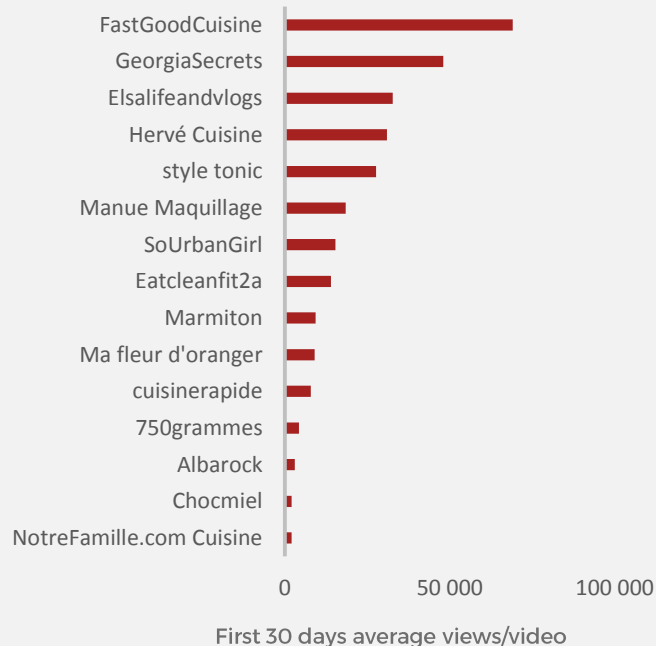
Cooking influencers are a more diverse bunch than in Beauty, for example, with men and women from different ages and also a media channel, Marmiton.

Cooking channels (Fastgoodcuisine, Hervé Cuisine, Ma fleur d'Oranger and Cuisinerapide) are specialized on recipes and which publish exclusively cooking videos.

Multi-topics channels (female channels like GeorgiaSecrets) who talk about cooking with **often an healthy aspect** and upload also videos about beauty, fashion or wellness.

While the average viewcount/video may seem low in comparison to other verticals –Beauty & Fashion–, one should take into account that the **lifetime of a cooking video is considerably higher**, so that total viewcount over time is even higher for cooking videos.

TOP COOKING INFLUENCERS
IN FRANCE



FastGoodCuisine totals nearly 70 000 views/video during the first month after upload

He posts recipes mainly on fast food products as burgers, crispy chicken, kebab or cookies

LIFESTYLE VIDEOS: NEWS FROM A VIDEO BLOGGER

Programming: news from the YouTuber plus trending news

The Video blog topic is linked to a format , the Vlog , which of course is used by many youtubers from beauty to gaming channels. However, videos are classified in this topic when they speak about general news on the YouTuber or on outside events, vs. tutorials, songs, haul videos, without a comic or parodic twist.

A major source of inspiration is thus the **YouTube channel's news** (pregnancy, holidays..) , another being worthwhile events, classified in topics such as Valentine's Day, Halloween, Christmas, New Year's Day.. Of course, those type of videos are also made by comedian channels and classified in Comedy or Parody.

The **subjects of each vlog can vary considerably** from video to video (travel, life changes,...) , which makes those channels quite flexible to accommodate multiple brand content products.



VLOG 5 –
New-York
avec
Birchbox !



Retour de
vacances ♥
VLOGMARS



Vlog | Que
se
passe-t-il ???



Dernier Vlogmars
& Nouvelle
couleur de
cheveux ♥
VLOGMARS



Vlog de grossesse
- Debut du 3ème
Trimestre, Update
& Livres

LIFESTYLE FORMATS: FACE CAMERA OR BOARD CAMERA

Speaking to the camera or followed by the camera

Face camera format : This format is used by YouTubers **to talk about her projects, life changes, or for opinions** she wants to express to the community. We find this format on channels that are not focused on vlogs like Horia's channel (also published on gaming channels for example).

Board camera : This format, bizarrely often also called a Vlog, is a way, for the YouTuber, **to make the community follow her in her activities**. There are **travel vlogs** where the YouTuber shares her experiences (landscapes, stores, food,...); **event reports** (meet-up with fans, brands events where the youtuber is invited,...) and also "day in the life" videos to show the daily life of a youtuber. This format is mainly used on Vlog focused channels like Caroline & Safia Vlog but can also be published on other beauty/fashion channels.

These 2 formats can be used by Brands for branded content and, this is already the case especially for board camera videos that are use for travel and event reports videos. It's a **good way to present products that can't be included into other formats** that are more restrictive.



Trop GROSSE ?
- Horia



SHOOTING
WeAreUs et
tenues
incroyables avec
Boohoo

LIFESTYLE VIDEOS INFLUENCERS: **VLOG CHANNELS** DOMINATED BY FAMOUS BEAUTY YOUTUBERS LIKE ENJOYPHOENIX

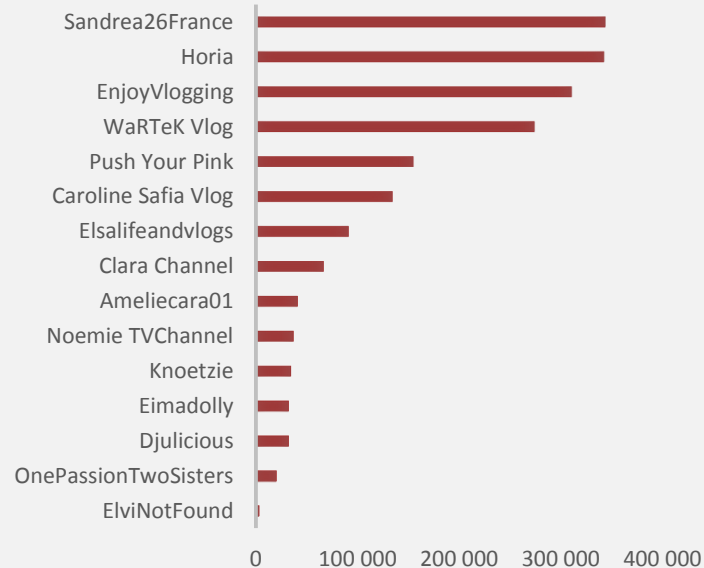
Lifestyle content is not the main topics for YouTubers

Except Wartek Vlog and ElvisNotFound, the influencers are all young women who often also talk about Beauty subjects, often on distinct, separate channels

Vlog focused channels are often the “second” channels of famous beauty youtubers that they use to only publish vlogs. The Wartek Vlog channel is part of the group because he is EnjoyPhoenix’s boyfriend and she is in many of his vlog videos.

Multi-topics channels are Beauty/Fashion channels where YouTuber’s also upload many vlogs on the same channel.

TOP VLOG INFLUENCERS
IN FRANCE



First 30 days views/video on the cluster

Sandrea and Horia are the major influencers in the Vlog vertical

They post videos where they talk about their lives : what they bought (clothes, beauty products...) and what they think about it... They also provide beauty advices. Sandra presents her pregnancy.

SPORT/WELLNESS VIDEOS: **PHYSICAL EXERCISE** AND HEALTH TIPS

Physical Exercise and Yoga, the 2 sport/wellness topics for the target

The biggest topic is “Physical exercise”, a **generic topic which includes different activities as fitness or stretching**. The yoga topic seems smaller because it is focused on just one physical activity, but looking into details, undoubtedly it is the most popular physical exercise of the demography.

Most of the videos on these topics are sport courses, focused on body parts, the main **objectives being to lose weight and refine the body's shape**. The videos showcase different techniques to achieve these objectives.

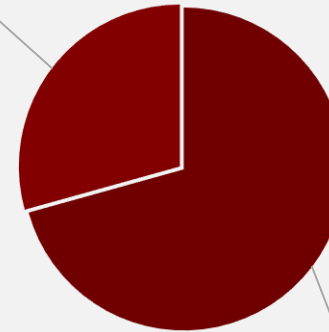
The Physical exercise topic also included initially bodybuilding videos which have been removed from the data because bodybuilding topics are specific to other demographies.

MAJOR SPORT/WELLNESS TOPICS



YOGA Challenge

Yoga: 29%



Torture en 12min pour un ventre plat



GET SEXY: Mes 5 meilleurs exercices pour un ventre plat en 10 minutes! | GeorgiaSecrets

Physical exercise: 71%

SPORT/WELLNESS VIDEOS FORMATS: **WORKOUT LESSONS AND HEALTH TIPS**

Sport courses and Wellness tips

Sport courses/tutorials form the main format on specialized sport channels, they are also used by some YouTubers. Most of the time, the YouTuber shows, in front of a fixed camera, **fitness, yoga or other physical exercises to reproduce**. The video subjects are often focused on losing weight and refine body shape.

Other sport videos adopt the **Vlog or Haul format**, with the YouTuber speaking to the camera and giving **wellness tips or its feedback on programs** experienced by the YouTubers. This can also integrates **product presentations** (food, sportswear,...), and the videos are focused on weight loss and staying healthy.

These two formats can be used for **brand content** videos especially **for sport equipment brands**. The second format can also be used for varied health products that the youtuber could introduce to its community into a vlog with healthy tips.

Like for Cooking, **it's important to keep the authenticity of the videos** by keeping the usual format of the youtuber and to let her include the product.



Tonifier & Muscler son corps (fesses cuisses)
Ft BodyTime Séance 1



Retrouver la ligne avec la course à pied, préparer une course, se challenger !

SPORT/WELLNESS INFLUENCERS: SPECIALIZED CHANNELS WITH **WORKOUT LESSONS**, OR GENERIC CHANNELS WITH **HEALTH TIPS**

A limited group dominated by health oriented channels

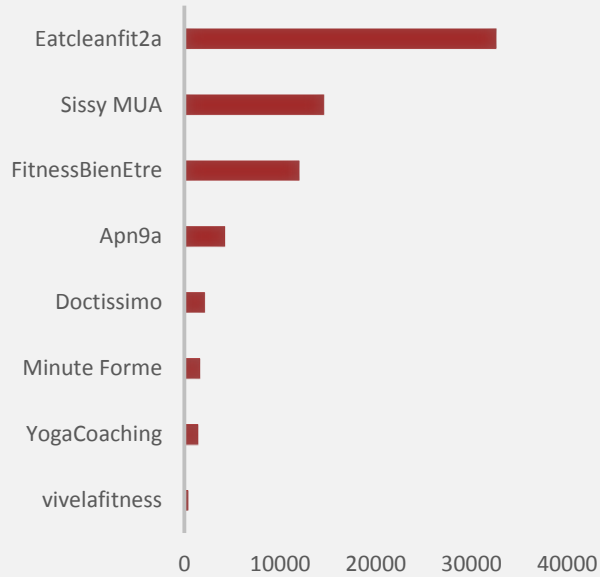
This group includes **8 channels** with the biggest sport/wellness French channels for the demography. Many of the major French sport channels are bodybuilding channels, thus excluded.

Influencers are often not as young as beauty influencers (Sissy Mua, FitnessBienEtre) . There are also media channels like Doctissimo or Minute Forme. Highest ranking channels of this group are **not focused only on sport exercises**, but often talk also about wellness and food.

Specialized channels have less views, but can be useful for brands wishing to create a YouTuber video on a very specific product.

As for cooking, those videos may have low viewcount in the first 30 days, but higher viewcount over their lifetime.

TOP SPORT INFLUENCERS
ON THE DEMOGRAPHY



First 30 days views/video on the vertical

Eatcleanfit2a gathers twice views than the 2nd influencer for her videos about healthy recipes and fitness advices

FASHION : TOPIC PRESENT IN MANY VIDEOS, **BUT RARELY ALONE**

Fashion on YouTube means videos showing clothing

On YouTube, fashion is about clothing and accessories. As indicated earlier, it is harder for young youtubers to create new videos about those products than about beauty products, both because products are more expensive and because creativity is not as easy as for hairstyle or make-up. It is telling that the top worldwide Beauty YouTuber, Michelle Phan, with more than 7.5 million subscribers has created a make-up brand for her fans, and not yet a Fashion brand.

Thus fashion is seldom about fashion shows, even if some youtubers get invited, and more about day-to-day products : T-shirts, shoes, accessories,...), fashion looks and also fashion shows. Also, while specifically fashion-centric videos do not gather huge views, there are many references to

In France, brand videos form a big part of views on this topic, with classic ads, fashion shows or photo shoots, so substantially different videos than the youtuber ones. In the US, things are a bit different, with a brand like Aeropostale producing many of its videos with youtuber Bethany Mota.



HAUL - Mes derniers achats en Amérique



HAUL : MODE/FASHION CNDIRECT/DRESSLINK [Haul 12]



Haul mode (Dresslink + Pimkie)



[Fashion Haul] Pull and Bear, h&m, Bershka, Undiz Batman & Co !



S'habiller à petits prix sur le net ! #3 - Horia

FASHION FORMATS: HAUL, LOOKBOOK OR DIY

Most formats are about showing products, rather than tutorials

Haul videos, also used for beauty videos (cosmetics products), **present fashion products** bought by the YouTuber. In front of the camera, the YouTuber tries on and shows the clothes and accessories that she bought in a store, a city or during particular periods like sales.

Lookbook videos are a presentation of outfits : **the YouTuber shows her full look** for a new season for example. These videos can be filmed outside and the YouTuber acts like a model to show her outfit to the community.

Some **DIY (do it yourself) videos** made by beauty YouTubers are tips to transform older clothes into new ones or to custom clothes. The format **“GRWM” (Get ready with me)** used on beauty also integrates fashion products as part of a full preparation.

Hall and Lookbook formats are often used for brand content videos because they are easy to use: presentation of fashion products is the video's objective. The DIY format can also be used for creative products like customizable clothes or accessorizes.



LOOKBOOK printemps:
8 idées de tenues



Haul : La redoute,
Mango, Zara,
Ctendance, Clinique

FASHION INFLUENCERS: NO SPECIALIZED CHANNEL BUT **MULTI-TOPICS CHANNELS**

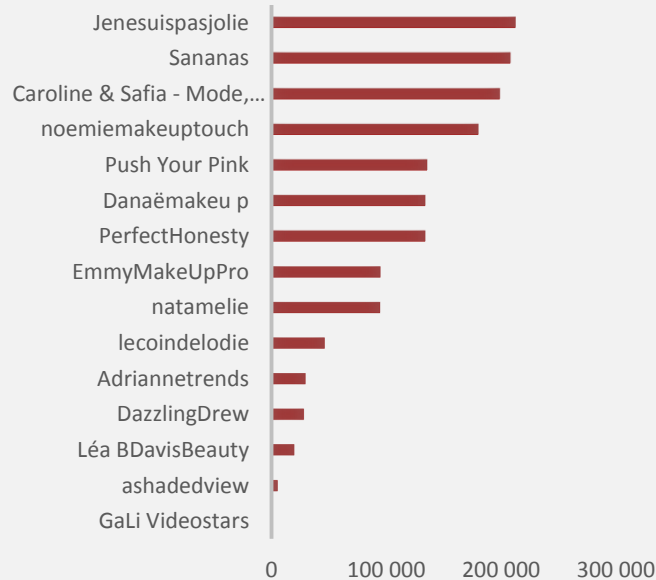
Most Fashion influencers also upload beauty contents

Influencers are mainly **young women who also upload beauty videos**. This is why some of these channels like Sananas and Caroline & Safia are also part of the Beauty influencers group.

As opposed to the beauty verticals, there are no Fashion specialized channels. There is always a mix of other beauty subjects and also vlogs for some of them.

Fashion is **a minor subject** for YouTube beauty creators. However, when one looks at viewcount per video, Fashion videos are actually amongst the highest, higher even than Beauty videos –except for EnjoyPhoenix.

TOP FASHION INFLUENCERS
ON THE DEMOGRAPHY



First 30 days views/video on the vertical

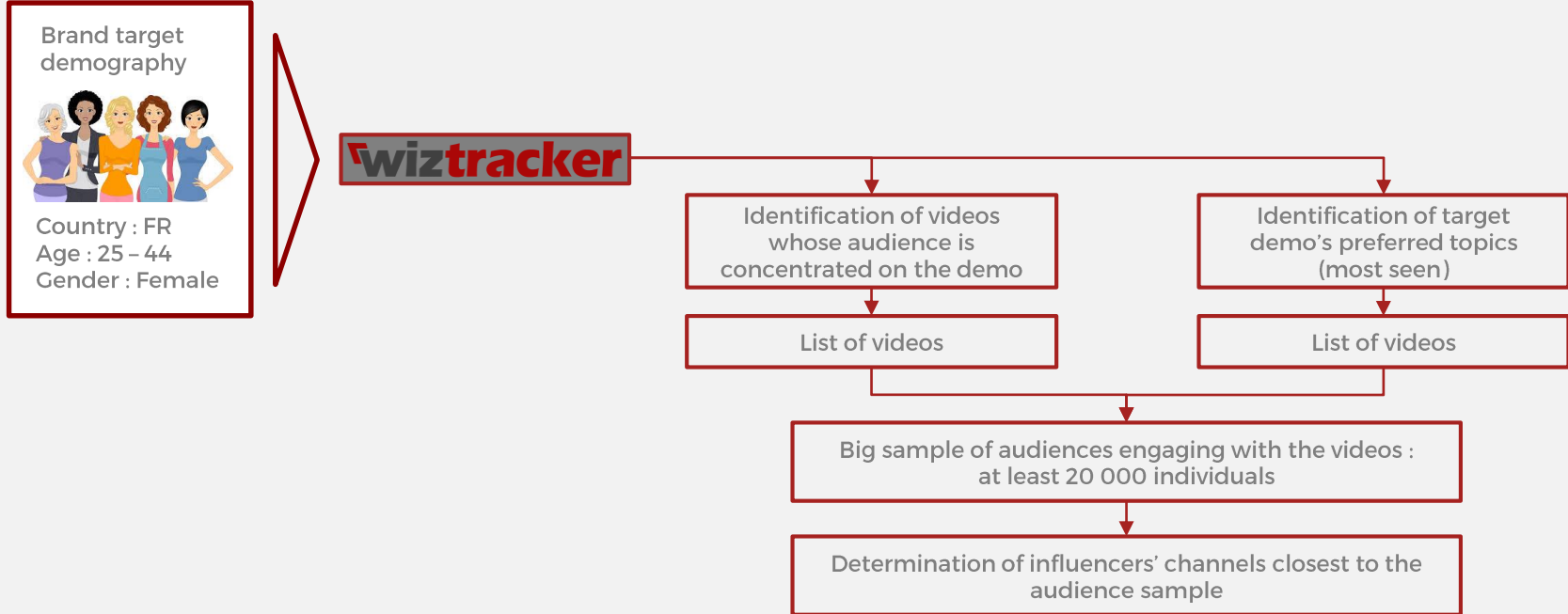
4 Top Fashion creators have more than 200k views/video in first month after upload

Haul, shopping and lookbook are the most watched videos

YOUTUBE INFLUENCERS FOR THE 25-44 DEMOGRAPHY

**Influencers which best address the whole demography,
or the two sub-demographies (25-34 and 35-44)**

IDENTIFYING INFLUENCERS CLOSEST TO THE 25-44 WOMEN DEMOGRAPHY: USING WIZTRACKER™ PROXIMITY TOOL



This method enables Brands to find the YouTubers who are closest to the target demography, in order to set up branded content deals or to refine paid media campaigns. The final channels list can be further filtered based on parameters such as the type of personality to impersonate a campaign, the content or the format type.

CHANNELS CLOSEST TO THE DEMOGRAPHY ARE IMPERSONATED BY YOUTUBERS NOT AS YOUNG AS CONTENT-SPECIFIC YOUTUBERS

Top ranking includes many Beauty-centric YouTubers

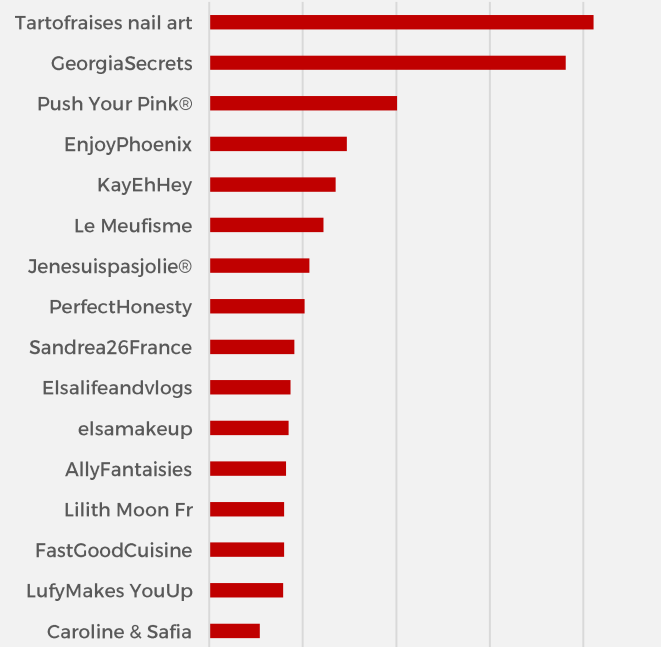
The YouTubers closest to the 25-44 demography are composed of beauty **Youtubers who are often not quite as young as** the top content-specific youtubers (LufyMakes YouUp, Sandrea26France,...), **some of them have children.**

This tends to prove that channels closest to the demography **are impersonated by women which are part of that same demography**, or at least closer to that demography than other major channels.

In light of the dominance of beauty videos in terms of topics vs. other topics, it is normal that most channels are beauty-centric, but there is also a cooking channel, FastGoodCuisine, in the selection.

However, none of the major comedian YouTubers are in the list, which means that their audience is much wider than the 25-44 demography.

FRENCH INFLUENCERS MOST FOCUSED ON 25-44 DEMOGRAPHY



The influencer with the highest proximity index is Tartofraises Nail Art

BEAUTY CHANNELS ARE MAINLY USED TO TARGET WOMEN BETWEEN 25 AND 34

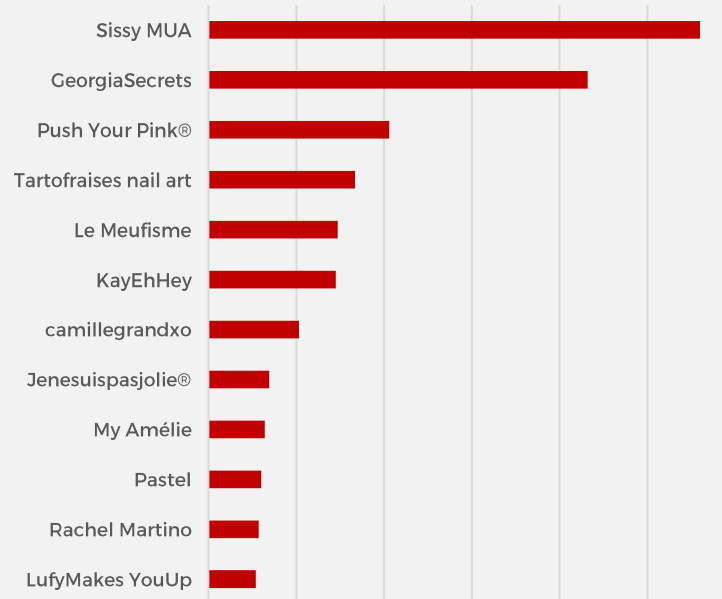
A younger target mostly interested in Beauty

This selection is really similar to the selection for 25 to 44 women because most of the exclusive topics are the same for the two demographics. **Closest YouTube channels on 25-34 demography are Beauty/Fashion channels.**

There are also channels who upload sport/wellness videos like GeorgiaSecrets and Sissy MUA.

Despite the relatively low viewcount per video, partnering with the youtubers offers **both Branded Content and Brand channel development opportunities.** However, undoubtedly, low viewcount per video means that those opportunities would have to be completed by strong Paid Media promotion to boost the Reach of the youtuber-created content.

MOST 25-34 WOMEN FOCUSED INFLUENCERS IN FRANCE



Georgia Secrets uploads mostly sports/wellness videos on her channel

BEAUTY CHANNELS SPECIALIZED ON TUTORIALS AND DIY ARE THE CLOSEST TO THE 35 - 44 DEMOGRAPHY ON YOUTUBE

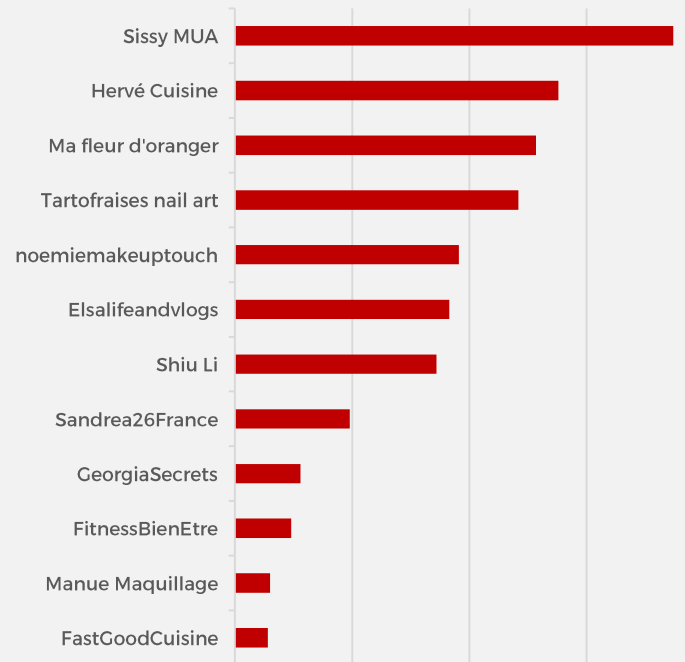
Beauty channels mostly concentrated on tutorial formats

The most concentrated YouTube channels on 35 to 44 women are also **Beauty channels but with different formats.**

The channels like TartoFraises nail art upload mostly **tutorials**. There are also two cooking channel, Hervé Cuisine and FastGoodCuisine, and fitness channels, like Sissy Mua but especially FitnessBienEtre, showing that undoubtedly, the demography is most focused on parenting than the 25-34 one.

Contents developed with youtubers specifically for this demography would need to take into account this higher focus on parenting; and , as for the 24-34 demography, partnerships with those YouTubers would need to be strongly complemented by paid media push, either by promoting the long-form content created with them, or by promoting shorter forms.

MOST 35-44 WOMEN FOCUSED INFLUENCERS IN FRANCE



Sissy MUA's channel offers several types of videos, including beauty tutorials, physical workouts and recipes.

HOW DO **BRANDS** POSITION THEMSELVES ON THE TARGET **DEMOGRAPHY** ?

Top brands by content preferences

BRANDS ACTIVE ON THE TARGET DEMOGRAPHY ARE, IN FRANCE, AMONGST **THE BIGGEST ADVERTISERS** ON YOUTUBE

Luxury, Beauty, Food, and Fashion brands address our target demography on YouTube through heavy investments in paid media and production

Brands included in the demography benchmark have been selected through a combination of industry knowledge, and analysis of the contents of the videos published on their channels- be they ads or other production. For this content-based selection, only audience-specific topics, i.e. the ones included in Beauty, Cooking, Sport/Wellness and Fashion have been used to select brands relevant to the demography. We have however excluded Movie, Music, or Retail brands which are seldom targeted preferentially on the demography.

A total of **583 Million**
views, of which
87% were paid media

For each brand, and for every single brand video **which generated views in the past year (April 2014-March 2015)**, the Wiztracker™ ad campaign tool estimated paid views, natural views, and duration of campaigns, through day-to-day observation of KPIs, **on a world-wide basis**. This means that brands can be ranked on total views, as well as on natural views. Brands present on the French market have been grouped in two sets: French-language channels when they exist, and English-language channels - for brands which have no specific French-language channels. Overall, brand views on those verticals are very high, with some of the leading YouTube advertisers included.

The viewcount on the brands' channels **does not reflect entirely their investments on YouTube**: those brand sponsored videos which are uploaded on the youtubers' channels are not included in the count, even though they can have high numbers of views and engagement. Many Beauty youtubers for example, upload brand-sponsored videos on their own channels, where they can gather more than a million views.

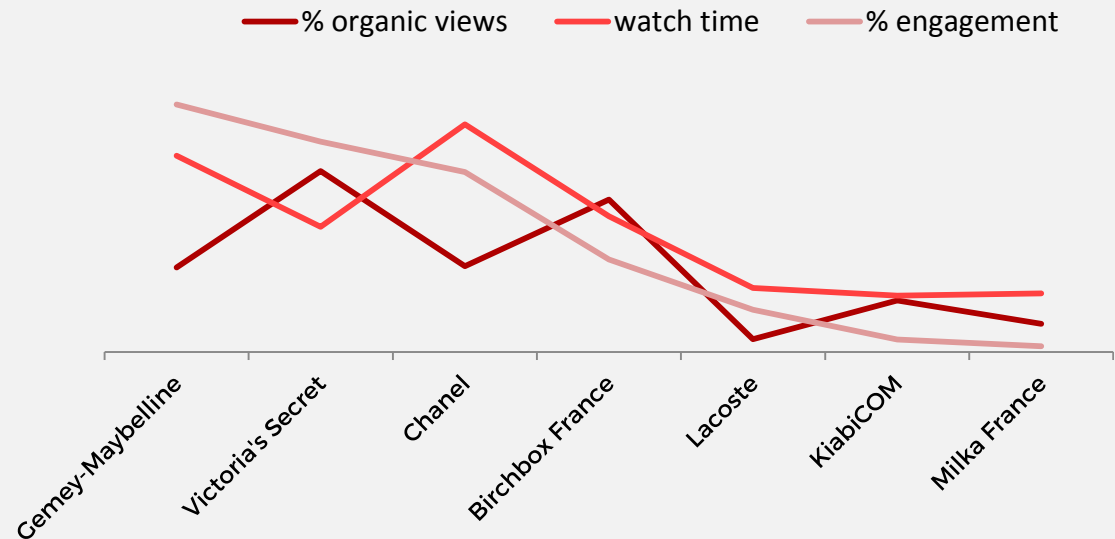
BRANDS CONNECTION WITH THE AUDIENCE: ACHIEVING HIGH ORGANIC LIFT MEANS MUCH HIGHER ENGAGEMENT AND WATCHTIME

With additional organic views, engagement - % of viewers who like, comment or share-, and average watch time per video are higher, as is brand impact

Organic views are of course a lift for the brand's reach: much of them come from new viewers not touched by the ad campaigns, which discover videos through search, suggestion or subscription.

Also, organic views by themselves have better engagement than ads, through comments and likes – pre-roll ads cannot be commented or liked; and the average watch time of viewers on these videos is higher than on ads, most of which seldom go beyond the 30 second mark. On average for brands analyzed, watch time is 5x the watchtime on paid views .

Brand performance analysis will thus focus mostly on how much and by which methods brands are able to generate organic views.



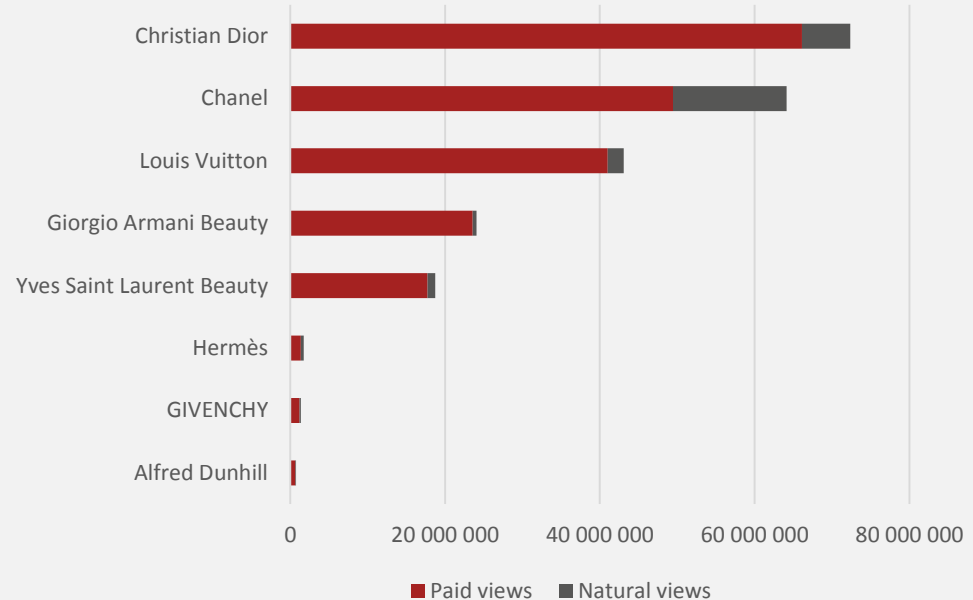
LUXURY BRANDS PRESENT IN FRANCE : 222 M VIEWS, 89% PAID

Huge ad investments for main brands, Chanel and Dior are the best in engagement

All channels are in English, and French audiences represent around 5% of natural audiences for these channels;

Best performers in organic views, are Chanel (14 M organic views) and Dior (6 M). In both cases, **success followed short movies** : for Chanel “The One that I want” with Gisele Bündchen and “Reincarnation” with Pharrell Williams, for Dior “Dior j’adore” with Charlize Theron. These promoted movies (27M ad views for the “Dior j’adore”) generated over 20K subscribers each, and ancillary contents were widely shared (700 K natural views for “London Grammar”, the song for the Dior ad). Afterwards, regular uploads on the channels – interviews, events like exhibitions or fashion shows- benefited from subscriber views .

Louis Vuitton also launched a short film with a big 20 M ad buy in September 2014, for the series “Louis Vuitton celebrating monogram”, **but earned metrics were lower**, with 8k subscribers gained vs. 26K for Dior, and 1/3rd of Dior’s organic views. As a result, engagement on Dior is on average 4X times on Louis Vuitton, with Chanel achieving 16X times Louis Vuitton.



BEAUTY BRANDS FRENCH CHANNELS : 63 MILLION VIEWS, OF WHICH 83% PAID

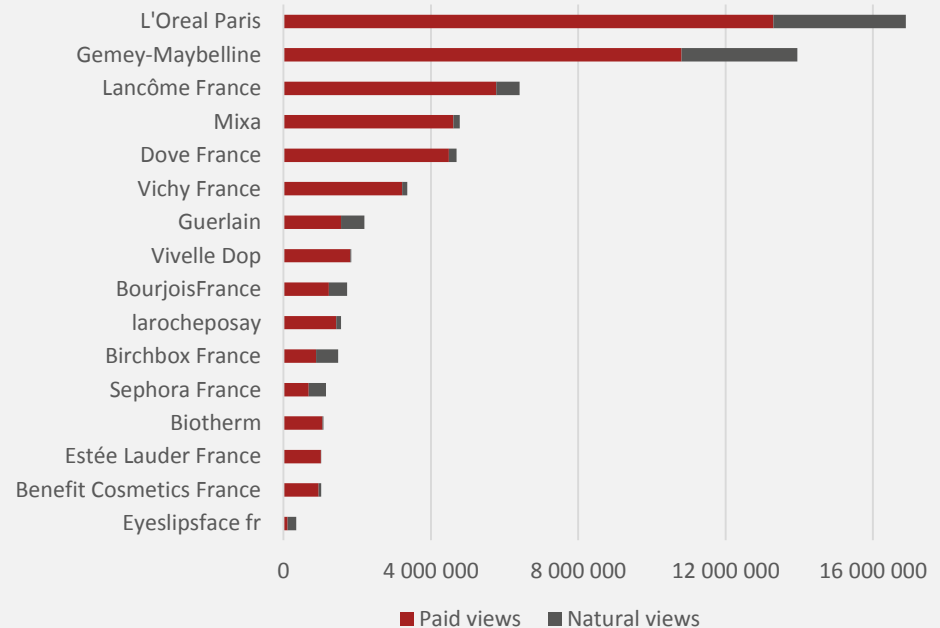
Organic success for brands comes from Youtuber partnerships + regular uploads

Seasonally, over 70% of the ads in the past year (April 2014-March 2015) were made in the second half of 2014.

L'Oreal and Gemey both managed to generate a substantial amount of organic views, not with their ads – their was little impact in natural views of their paid campaigns- but through uploads of YouTube-friendly formats.

For L'Oreal, the 3,6M natural views were make up tutorials by vloggers – but no significant youtuber- and a Blush contest linked with World of sisters channel. Gemey-Maybelline launched in 2015 a weekly video series with leading youtuber, EnjoyPhoenix –with paid media for teasers- which has massively propelled its channel, with over 3 M natural views in 4 months.

Lancome also had a program with US youtuber Lisa Elridge in 2014, but it was a subtitled video, so with less impact. EyesLipsFace has twice as much natural views than its – small- paid views, mostly by massively publishing tutorials.



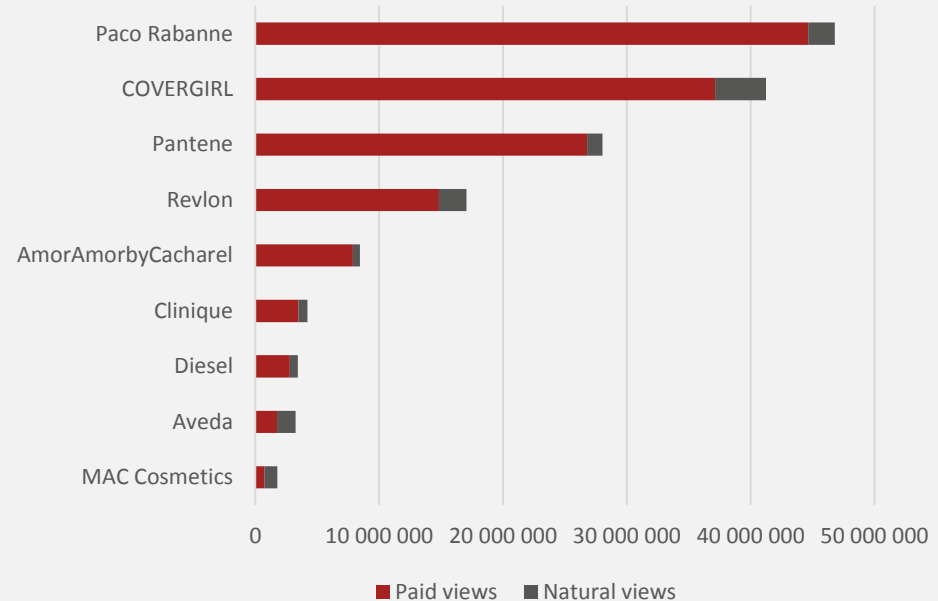
BEAUTY BRANDS ENGLISH CHANNELS PRESENT IN FRANCE : **154 M VIEWS, 91% PAID**

Covergirl leads the way in increasing engagement through Youtuber partnerships

French audiences represent around 5% of natural audiences for these channels, but may represent more for paid media, also concentrated on Q3-Q4 2014.

Covergirl leads organic success with 4 M natural views, by mixing in its channel programming traditional ads with tutorials by celebrities with a strong following on YouTube such as EllenDeGeneres or Katy Perry, but also youtubers Ingrid Nilsen, Stephanie Ledda, Aspyrn Ovard . Those Youtuber partnership videos have pushed subscriber count over 100K, and generated in average over 50000 organic views per video.

Paco Rabanne generates a small amount of natural views with a series (Invictus awards season 2) featuring sports stars , but its channel is mostly a repository for its TV and online ads.



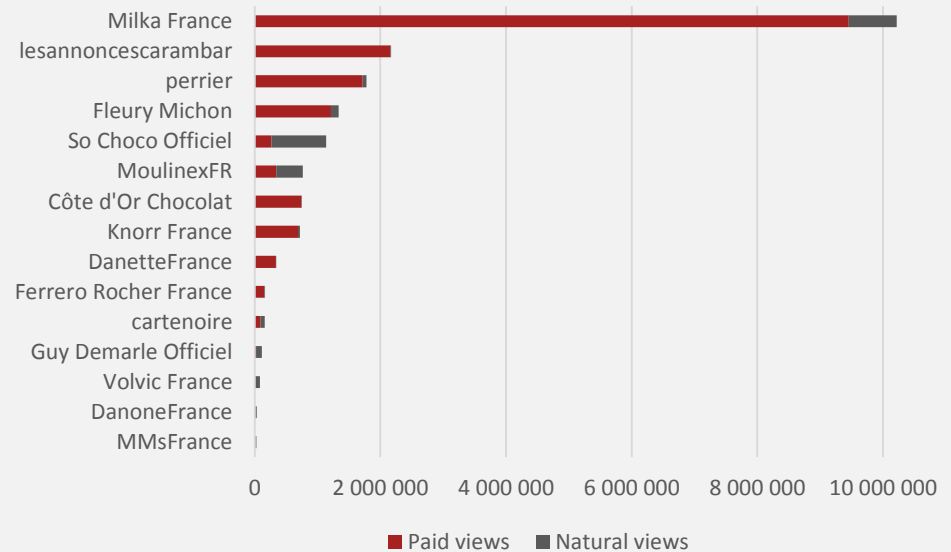
FOOD BRANDS FRENCH CHANNELS: 20 MILLION VIEWS, OF WHICH 87% PAID

Few youtuber partnerships, but some recipes well referenced on YouTube.

Overall, media buys are much lower in this category – which does not include big retail brands for France-, than in the Beauty/Luxury categories; organic views are low also, even though a few channels have launched Youtuber partnerships and have well positioned some videos on search pages.

So Choco was the leader in 2014 for natural views with 900K organic views; the channel, launched late 2013, combined several fictional series, including one starring some big youtubers (Jimmyfaitlecon, Ludo from Studio Bagel), but with limited success in terms of subscribers gained and overall organic views. The quite varied nature of the video series, with a mix of comedy, lifestyle, and news, made it harder to build a subscriber community based on the subscriber's community.

None of those numbers include any of the videos that brands have sponsored on youtubers channels, and in the Food industry, there have been a number of those in 2014, such as for Danone/Actimel on LaChaine de Jeremy (over 3 M views) or more recently Knorr on Herve Cuisine (total over 100k views).



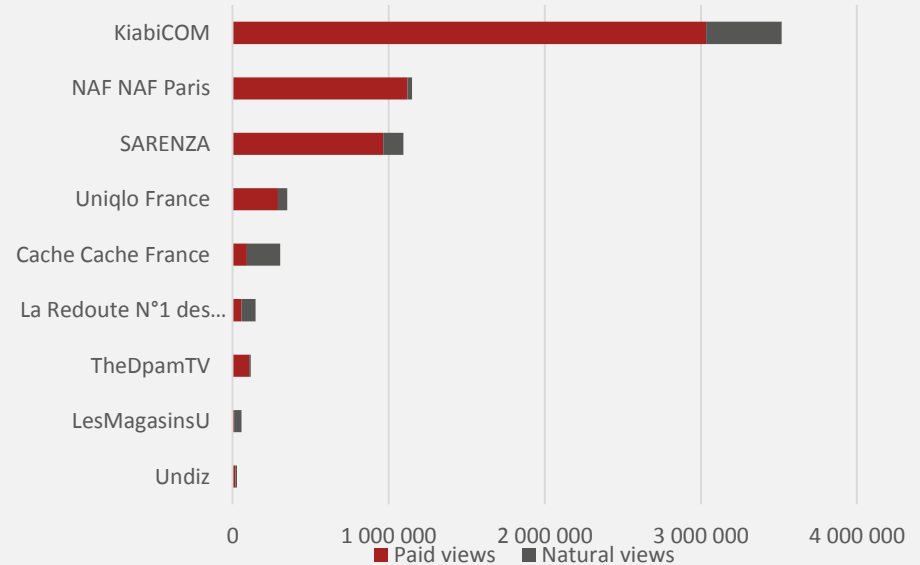
FASHION BRAND FRENCH CHANNELS : 6,8 MILLION VIEWS, OF WHICH 75% PAID

Online retailers use their strong social communities to pull in views

In this group, we mostly find retailers like La Redoute, Kiabi, Sarenza. Those retailers have mostly used paid media, those being TV ads also uploaded on YouTube, and little YouTube-specific content.

Kiabi did publish YouTube friendly content with some tutorials on how to dress, and a series of fashion videos with a Blogger (Stéphanie Zwicky) but the number of views have stayed low, with a large part due to embeds on the site, since the blogger was not known on YouTube. Most of its Youtube success has thus been due to its huge community on Facebook, with more than 3M fans for its page, where it published all its Youtube videos.

Cache Cache, which has limited paid media investment on Youtube, has also used its over 500K Facebook fans to pull in natural views on its videos.

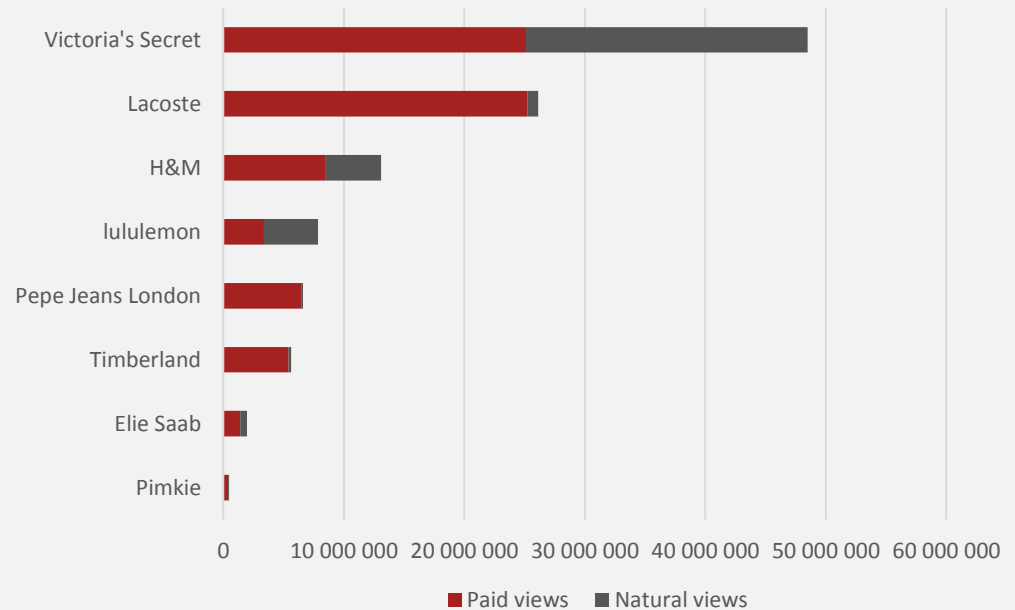


ENGLISH LANGUAGE FASHION CHANNELS : 118 M VIEWS, 65% PAID

Fashion brands foster organic success with fitness and events

Victoria's Secret channel has long benefited from views on its sexy videos without too many efforts, building up one of the biggest subscriber base among its peers with more than 600K. but in the course of last year has also managed to introduce engaging program more directed to its female target clientele: its fitness series "Train like an angel" featuring Adrianna Lima and Alessandra Ambrosio, has performed both in organic views and subscriber conversion. Other fitness or sport event-based content turns around swimming, even football (around the SuperBowl..) . The channel has thus successfully widened its appeal to its target demography, and has thus both high engagement rates and a unique organic push, with close to 50% organic views (23M organic views) .

H&M, on top of ads, some tutorials, but mostly videos on fashion events or shot in cities around the world , a bit like travel videos. Combined with an intensive uploading schedule of 2 videos a week, this has allowed H&M both to increase its subscriber base to over 100k and generate an average of over 5000 natural views on the first week after upload.



CONCLUSION

Focusing on overall channel development rather than on one-shot campaigns is a winner

ACHIEVING BETTER ROI ON AN-OVER 100 M€ SPEND TARGETING **FRENCH 25-44 WOMEN ON YOUTUBE**

Significant performance differences between Brands point to huge opportunity

Estimating the amount of spending directed **-paid media, youtuber partnerships, content production-** is not exact science, but 500M of paid views (part of it outside France), 3000 videos produced, and >100 produced on youtuber channels, and this just on our limited sample, means that overall spend of all brands towards the demography is probably north of 100M €.

Overall KPIs of main brand channels are still much lower than for youtubers: EnjoyPhoenix, with its over 80M views only on a french-speaking audience (April 2014 to March 2015), beats the biggest brand in the sample, Christian Dior with 70M views. Its engagement ratio, and watchtime/video are respectively 8X and 4X for the best of the brands, Chanel. Of course, it's not entirely fair to compare brand channels with youtubers, whose goal is to entertain, not to promote, but some of the gap can be bridged.

However, when comparing brand channels, even within the same verticals, their performances vary greatly in terms of both organic lift and engagement. Those aren't a measure of overall brand lift, but Wizdeo's projects on brand channel optimization have shown a strong link between overall engagement and brand lift, and of course organic lift also increases reach..

This points to a huge opportunity for many brands in programming, without significantly increasing spend. For example, brands which produce videos in several languages and upload them on a single channel, do not attract loyal subscribers. Also, uploading on YouTube the same videos that illustrate their web product pages, instead of telling stories and entertaining, leads to poorer results. Finally, it is worthwhile to use youtuber creativity and communities : the Gemey-Maybelline series with EnjoyPhoenix has terrific results.

Finally, for paid media, data on content and creator preferences can be much better exploited both for promoting content which is audience-proven - by selecting the right topics & influencers- and by more refined targeting when the brand knows the affinity between content preferences and its own customer segmentations.

Audience knowledge is a strategic opportunity for Brands to perform on YouTube.

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