GENZ.TV

RESEARCH GUIDE
VOLUME 01 · SEPTEMBER 2026

BRANDS · GEN Z · AND THE CREATORS IN BETWEEN

FROM CHAOS TO CLARITY.

What the world's biggest consulting firms, the platforms, and 72 million American twenty-somethings are telling brands about creator partnerships in 2026. And the plan for a Gen Z-native agency built on top of it.

CULTURE · COMMERCE · CREATORS
REAL IMPACT

GENZ.TV
BUILT FOR WHAT'S NEXT

WHAT'S INSIDE

Seven sections. Every number is sourced, every source is dated, and where the research disagrees we say so instead of averaging the disagreement away.

READING THE SIGNAL

Blue is the human. Red is the money. Orange is the machine. Lime is the moment the three line up. That colour logic runs through every chart in this guide.

EXECUTIVE SUMMARY

THE ONE-OFF DEAL IS DYING. SOMEBODY HAS TO RUN THE FUNERAL.

The creator economy is worth somewhere between $235 billion and $600 billion, depending on who is counting and what they count. Goldman Sachs puts the addressable market near $480 billion by 2027. Whatever the true figure, Gen Z sits in the middle of it: 72.2 million Americans, $2.7 trillion in global spending power heading toward $12 trillion by 2030, and an 87% willingness to buy on a creator's say-so.

Every major consulting firm (Deloitte, McKinsey, Accenture, EY, PwC, BCG) has independently reached the same conclusion: brand-creator work is professionalizing. It is moving from a sponsored post bought once toward always-on, measured, commerce-integrated partnerships. Accenture bet real money on that thesis when it bought Whalar in 2026, and Accenture's own research says 63% of brand-creator relationships are still one-off deals. That 63% is the opening.

The tools market is crowded and consolidating. GRIN, CreatorIQ, Later, Aspire, Upfluence, Modash, Traackr and Captiv8 all sell competent influencer infrastructure. None of it was built around Gen Z identity, culture, or authenticity signals; it is generic plumbing pointed at whichever demographic the client picks. Fanfix, the one platform that was explicitly Gen Z, was just acquired by SuperOrdinary.

Our position is that the wedge is a **Gen Z-native, trust-verified matchmaking layer** focused on mid-tier and nano creators, licensed on top of existing data infrastructure rather than rebuilt from zero, and sold as a complement to talent agencies rather than a competitor to them.

> "PEOPLE AREN'T SAYING, I TRUST THIS PERSON BECAUSE THEY HAVE TWO MILLION FOLLOWERS. THEY'RE SAYING, I TRUST THAT CREATOR WITH TWELVE THOUSAND FOLLOWERS WHO SHARES MY VALUES."
>
> **Sara Rezaee**, Head of Creator Marketing, North America, Edelman · on the 2026 Trust Barometer

TWELVE NUMBERS TO CARRY INTO ANY ROOM

THE DASHBOARD

$12T
GEN Z GLOBAL SPENDING POWER BY 2030

NielsenIQ

$480B
CREATOR ECONOMY TAM BY 2027

Goldman Sachs

87%
OF GEN Z WILL BUY ON A CREATOR RECOMMENDATION

Clutch.co

63%
OF BRAND-CREATOR DEALS ARE STILL ONE-OFF

Accenture, 2026

$44B
US CREATOR AD SPEND PROJECTED FOR 2026

IAB Creator Economy Ad Spend Report

$11.8B
TIKTOK SHOP US GMV, FIRST HALF OF 2026 (+103% YOY)

Momentum Works × Tabcut, Aug 2026

44%
OF PAID MEDIA CREATIVE NOW COMES FROM CREATORS

CreatorIQ, Jun 2026

97%
OF CMOS PLAN TO RAISE CREATOR BUDGETS IN 2026

LTK × Northwestern RAC

72.2M
GEN Z AMERICANS, 20.9% OF THE POPULATION

PopulationPyramids.org

57%
OF GEN Z SAY THEY WANT TO BE AN INFLUENCER

Morning Consult via CNBC

31%
OF GEN Z SAY THEY TRUST INFLUENCERS AS A CATEGORY

Rival Technologies, Aug 2026

4X
MORE LIKELY TO RENEW WHEN CREATORS FEEL SUPPORTED LONG TERM

Deloitte

> READ THOSE LAST TWO TOGETHER. ONLY 31% OF GEN Z TRUST "INFLUENCERS", YET 87% BUY ON A RECOMMENDATION FROM ONE THEY FOLLOW. THE CATEGORY IS DISTRUSTED; THE INDIVIDUAL IS NOT. THAT GAP IS THE ENTIRE BUSINESS.
>
> **GenZ.tv analysis** · Rival Technologies and Clutch.co

WHERE THE MONEY IS GOING

IAB Creator Economy Ad Spend Report; 48% of buyers now call creators a "must buy".

01
WHY NOW: THE MARKET CASE

1.1 BIG, STILL GROWING, AND MEASURED SIX DIFFERENT WAYS

Six credible research firms put the 2026 "creator economy" anywhere from $235 billion to more than $600 billion, depending on whether they count ad spend only, total creator income, or platform payouts. Grand View Research's method has the market going from $252.3 billion in 2025 to $310.4 billion in 2026, on a path to $1.35 trillion by 2033 at a 23.3% CAGR.

The money behind the money is moving too. More than $2 billion went into creator-economy startups in 2025, with $1.2 billion of that landing on just eight AI content-creation companies. US brand spend on creator and influencer marketing hit $10.52 billion in 2025 and is projected at $12.17 billion for 2026 (eMarketer). Measured the IAB's way, which counts all creator-driven advertising, the US figure is $37 billion in 2025 and $44 billion in 2026.

Sentiment matches the spend: 92% of brands plan influencer partnerships in 2026 (Ogilvy), Kantar reports a net 61% of marketers increasing creator investment, and the median share of social budgets going to creators has climbed from 18% in 2024 to 26% in 2026.

1.2 GEN Z IS THE AUDIENCE AND THE SUPPLY

Gen Z is about 25% of the global population and 20.9% of the US population, 72.2 million people. Bank of America Institute projects Gen Z's global income will reach $36 trillion within five years and $74 trillion by around 2040. McKinsey expects Gen Z spending to pass baby boomer spending by 2029, growing twice as fast as older generations.

On the supply side, 57% of Gen Z say they want to become an influencer, against roughly 41% of all US adults (Morning Consult via CNBC). McKinsey finds about 45% of Gen Z creators hope to leave a 9-to-5 to create full time. That is a large, motivated, and mostly un-agented pool to build a database around.

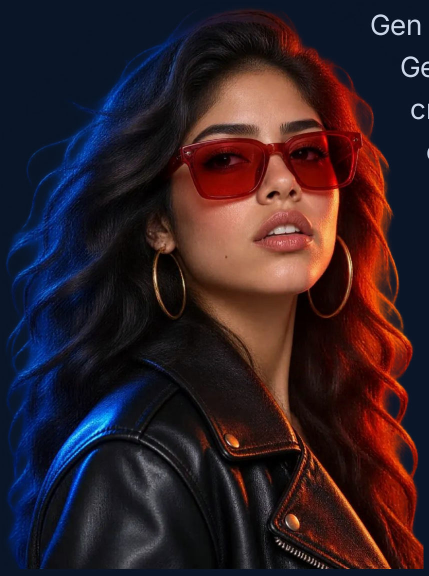
$36T
GEN Z INCOME WITHIN 5 YRS
BofA Institute

2029
GEN Z OUTSPENDS BOOMERS
McKinsey

45%
OF GEN Z CREATORS WANT TO GO FULL TIME
McKinsey

IMPLICATION FOR GENZ.TV
Cite one sizing method per document and name it. Investors have seen the $600 billion slide; they have rarely seen someone explain why it is not $250 billion.

1.3 GEN Z TRUSTS THE CREATOR THEY FOLLOW, AND ACTS ON IT

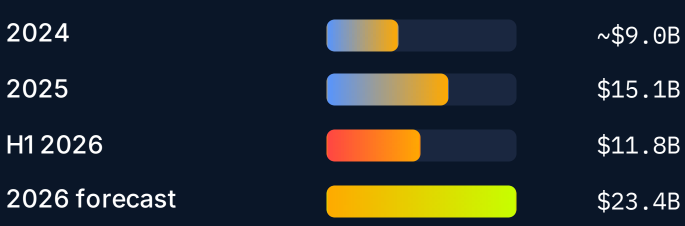


Gen Z is 87% likely to buy on an influencer recommendation, against 77% for Gen X and 54% for boomers (Clutch.co). LTK's Gen Z Shopper Study found creators 3.5 times more influential than social ads, with 75% of Gen Z buying online and 77% in store on a creator's recommendation. The IAB's 2026 Creator Impact Report has 69% of Gen Z buying at least one item a month on creator recommendation, and Salsify finds 73% of US Gen Z call social media their main way of learning about new products.

The channel is now a checkout. TikTok Shop's US GMV reached $15.1 billion in 2025 (+68%), then $11.8 billion in the first half of 2026 alone, up 103% year on year, with 5,700 US stores past $1 million in GMV, eight times the prior year. Nine of the top ten US TikTok Shop sellers by GMV relied primarily on live commerce. eMarketer's full-year forecast is $23.4 billion in US TikTok Shop sales for 2026.

Here is the caveat worth keeping. Rival Technologies' August 2026 study of 903 people aged 18 to 29 found influencers trusted by only 31%, the third-least-trusted of 14 categories tested, below social platforms (33%) and just above AI companies (24%). Trust in the category is low; trust in the specific creator someone chose to follow is what drives the 87%. This is the same pattern Edelman describes in its 2026 Trust Barometer: seven in ten people now live insular lives, and "proximity matters more than popularity."

TIKTOK SHOP, UNITED STATES (GMV)



Momentum Works (Feb and Aug 2026); eMarketer, Jan 2026. 2024 figure derived from the 2025 growth rate.

> "CREATORS ARE NOT SIMPLY CONTENT DISTRIBUTORS. AT THEIR BEST, THEY ARE BROKERS OF TRUST."
>
> **Sara Rezaee**, Edelman · "An insular world: trust and creators", March 2026

IMPLICATION FOR GENZ.TV

This is a durable behavioural shift, which is exactly why Accenture, CreatorIQ and SuperOrdinary all made acquisitions in the space inside twelve months. Build for a world where the creator is also the storefront.

02 WHAT THE BIG SIX ARE TELLING BRANDS

Every major firm has published on Gen Z, the creator economy, or both. Read together, seven themes repeat. Each one should shape how genz.tv positions itself.

2.1 ONE-OFF DEALS ARE BECOMING ALWAYS-ON PROGRAMS

Accenture's own research found 63% of brand-creator relationships remain one-off, and it is building infrastructure to convert them into "always-on revenue programs" with TV-buy-grade measurement. Deloitte found creators about 4 times more likely to renew when a brand supports their long-term growth and 5 times more likely when satisfied with pay. EY's 2026 outlook calls the field "transitioning from influencer marketing to full-scale business collaboration."

> **IMPLICATION**
> Sell retention and lifecycle management of creator relationships, never one-time bookings.

2.2 MID-TIER AND NANO CREATORS BEAT CELEBRITIES ON ROI

BCG says it plainly: "mid-tier creators deliver the best ROI" (10K to 100K followers), from a study of 1,900+ consumers and 60+ brands. Its fashion research found micro-influencers under 100K almost as effective for discovery as million-plus celebrities (22% vs 27%). Deloitte's highest-ROI brands run 6 to 15 creator partnerships at once, double the low-ROI brands, spread across creator sizes.

> **IMPLICATION**
> The defensible value is precision-matching brands to under-the-radar, high-resonance creators. Aggregating follower counts is something every competitor already does.

2.3 AUTHENTICITY AND SHARED IDENTITY NOW OUTRANK RAW REACH

EY's Gen Z study found more than 90% rank authenticity among their highest personal values, while only 34% trust large institutions. Deloitte found consumers 50% more likely to buy a creator-recommended product when they share the creator's socioeconomic background. McKinsey notes big brands find it harder to look authentic in creator content than small ones do. BCG and Accenture both call Gen Z "product-loyal, not brand-loyal."

> **IMPLICATION**
> Matching logic needs identity, values and audience-demographic fit as a primary signal, not just category and follower count.

2.4 AI IS BECOMING CORE INFRASTRUCTURE FOR DISCOVERY, MATCHING, AND PRODUCTION

Deloitte describes AI-driven discovery tools matching brands to niche micro-creators. Accenture's Whalar acquisition is built around folding creator data into AI-driven personalization. BCG urges brands to prepare for "agent engine optimization" as AI agents become a discovery and commerce channel. CreatorIQ's June 2026 funnel report finds creator content now powers 44% of paid media creative, and 77% of brands say it outperforms traditional branded creative.

> **IMPLICATION**
>
> AI-native matching and briefing tools are table stakes within 12 to 24 months, not a moat. Build them early; plan the real differentiation elsewhere (identity and trust data, Gen Z network access).

2.5 MEASUREMENT IS MOVING TO FULL-FUNNEL COMMERCE ATTRIBUTION

BCG calls for measurement built on intent uplift, click-through, and bottom-funnel conversion, using UTM links, affiliate tracking, and A/B tests, framing creators as "full-funnel brand assets." Accenture's stated ambition is measurement with "the same accountability as a TV buy." LTK's CMO study found 57% of brands have folded creator marketing into the same measurement framework as paid media.

2.6 CREATOR-LED COMMERCE IS THE NEXT VALUE POOL

BCG names the model outright: creators co-launching products, driving affiliate conversion, hosting live shopping, dropping exclusive merchandise. Accenture counts more than 20,000 influencers using tools to launch their own product lines, and cites a Chinese livestreamer earning $20 million a month mostly from commerce. EY predicts creators will increasingly own IP rather than remain endorsers.

2.7 AI FAKES ARE RAISING THE VALUE OF VERIFIED, REAL CREATOR RELATIONSHIPS

Accenture's Life Trends data show 60% of people increasingly question online-content authenticity; 39% have seen fraudulent reviews and 33% have experienced deepfake scams. Sprout Social's 2025 and 2026 pulse surveys found 56% of Gen Z trust brands that commit to publishing human-made content, and nearly half are uncomfortable with AI influencers. EY's 2026 outlook insists on brand safety, editorial quality, and creative integrity as guardrails.

> **TAKEAWAY: GEN Z TRUST IS MIGRATING FROM BRAND EQUITY TO INDIVIDUALLY VERIFIED, IDENTITY-ALIGNED CREATORS, WHILE BRANDS TURN AD HOC DEALS INTO MEASURED, LONG-TERM, COMMERCE-INTEGRATED PROGRAMS. GENZ.TV'S OPENING IS TO DO AT BOUTIQUE SCALE WHAT THE BIG SIX CAN ONLY PARTLY DO, AND SELL IT AS INFRASTRUCTURE AND CONSULTING, NEVER AS A CAMPAIGN VENDOR.**

03
CROWDED, FUNDED, CONSOLIDATING, AND GENERIC

The influencer-marketplace category is crowded, well funded, and consolidating. Almost none of it is Gen Z-native. What follows is the field as it stood in September 2026, with pricing where it is public.

PLATFORM	MODEL	PRICING	NOTABLE
GRIN	AI-agent-assisted sourcing, outreach and gifting for e-commerce brands; 700K+ creators	Free tier, then usage credits from $200/mo	No annual contract required
CreatorIQ	Enterprise creator suite (Disney, Unilever); acquired Tribe Dynamics (~$70M)	Enterprise, ~$30K+/yr	Paid amplification of creator content up 56% YoY industry-wide in 2026
Whalar	Full-service creator and social agency; $600M+ in campaigns across 40+ countries	Custom / agency	ACQUIRED by Accenture Song, 2026
Later Influence	Discovery and campaign management bundled with social scheduling	~$28.5K to $60K+/yr	Later pricing
Aspire	E-commerce influencer, affiliate and UGC platform; no platform fee on creator payments	Quote-based	Aspire.io
Creator.co	AI-powered marketplace, 400M+ creator access	$99 per 100 contact credits and up	Creator.co pricing
Upfluence	Modular AI-powered D2C discovery, outreach and payments	~$14K to $16K/yr realistic entry	Upfluence pricing
Modash	Shopify-first discovery API; no commission on creator payouts	$10K to $16.2K/yr (API)	CLEAREST PATH to a proprietary database
Traackr	Brand-safety-focused enterprise discovery and analytics	~$25K to $63K/yr	MentionAgent
Captiv8	Full-funnel discovery, vetting, contracting and measurement	~$25K/yr + $3K onboarding	Creator Hero
Fanfix	"Fastest-growing monetization platform for Gen Z creators"	n.a.	ACQUIRED by SuperOrdinary, $60M+
GENZ.TV	Gen Z-native discovery, vetting ("GenZ Verified") and matchmaking layer for brands and boutique agencies; consultancy; original shows	Custom / agency, quote-based	OPEN LANE the only independent Gen Z-native player after Fanfix's exit

Sources: vendor pricing pages, Accenture Newsroom, PRWeek, Voxbooster, GCI Magazine.

TWO STRUCTURAL FACTS

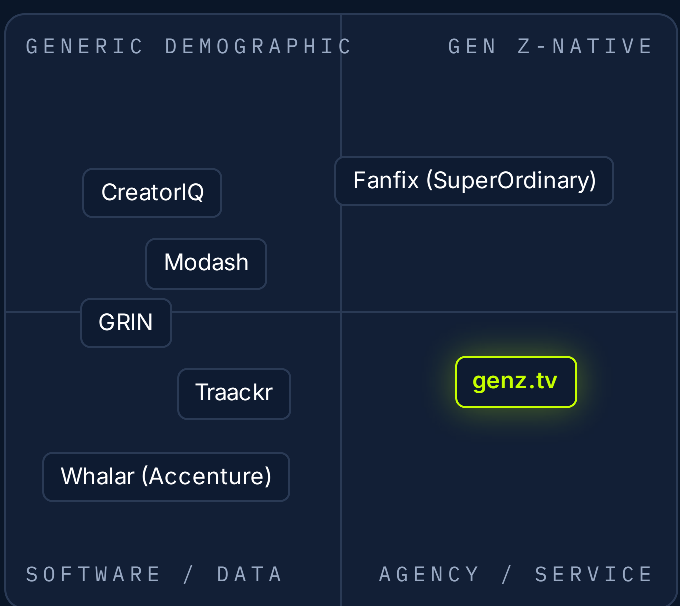
Consolidation is accelerating. Accenture-Whalar and CreatorIQ-Tribe Dynamics say the same thing: large holding companies now treat creator infrastructure as core marketing infrastructure worth buying, not a bolt-on. Expect professionally staffed, well-funded competition from day one.

The Gen Z lane just emptied. Fanfix was the only platform on the list built explicitly around Gen Z, and it was just acquired. That leaves room for an independent, Gen Z-branded competitor with an earned domain name and no parent-company agenda to serve.

TALENT REPRESENTATION IS STRATIFYING

The field is splitting between volume players (more creators, more deals: Whalar Group, Studio71, Underscore Talent) and boutique players with fewer creators and deeper business-building support (Amplify Talent), per Digiday. Standard commission runs 15% to 20% of a creator's gross for talent managers versus 10% for union agents (Dots), and campaign agencies take about 30% of influencer spend industry-wide (ANA via MediaPost).

WHERE THE WHITE SPACE IS



RECOMMENDED POSTURE

Do not sign and exclusively represent creators. That puts genz.tv in a fight with well-capitalized talent agencies over the same people.

Position instead as the discovery, vetting and matchmaking layer that feeds pre-vetted Gen Z shortlists to brands directly *and* to boutique agencies. Complementary infrastructure, not a rival for representation.

Agencies already answer brand email at a 12% to 22% reply rate while creators' DMs sit at 0% to 2%. Make the agencies' sourcing faster and they become a channel, not a competitor.

04 THREE TRACKS, ONE FLYWHEEL

Three tracks came out of the research. They are complementary, not exclusive; the players doing best in this space (Whalar, Fanfix, GRIN) blend at least two of them.

TRACK A · THE GEN Z CREATOR REPOSITORY AND MATCHMAKING MARKETPLACE

BUILD FIRST

A structured, continuously updated database of vetted Gen Z creators, filterable by niche, platform, audience demographics and authenticity score, matched to brands that want Gen Z-specific campaigns.

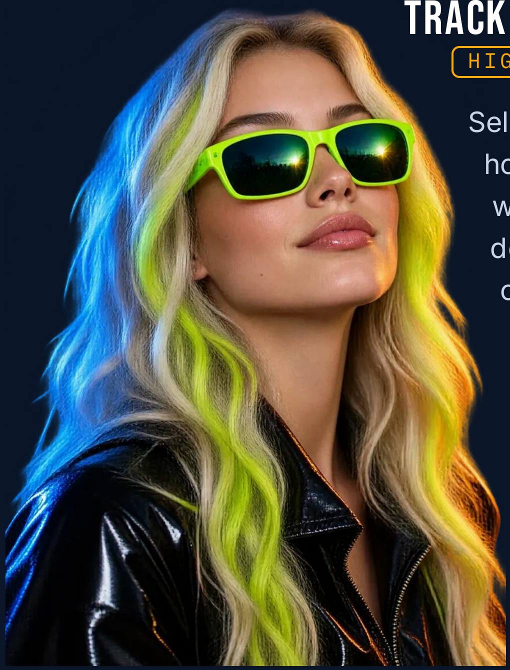
Data backbone. License Modash's Discovery API ($10,000 to $16,200 a year) as the fastest credible path to a proprietary database: 380M+ profiles with follower counts, growth rate, engagement, audience demographics and past brand collaborations. Supplement with HypeAuditor's free fake-follower and rate calculators for lightweight checks.

Vetting layer (the actual moat). Engagement-rate benchmarks by tier (1% to 3% is the reference range for a real account; far below that on a large base is a fraud signal), manual review of 3 to 5 recent posts, and a documented brand-safety review of the last 6 to 12 months of content. This is where genz.tv out-executes generic tools: a **"GenZ Verified"** badge signalling authenticity, values fit and brand-safety clearance, a direct answer to the trust erosion Accenture flagged.

Category focus at launch. Beauty and CPG dominate current spend (35.6% and 28.2% of campaign volume) and are the most contested; 5WPR reports Rhode, Merit and CeraVe now run 1,000-plus creator seeding programs, and calls anything under 500 per quarter "structurally underscaled." B2B influencer marketing (+47% YoY) and AI-generated creator content are growing faster with less competition. Anchor the first repository in 3 to 5 categories where Gen Z leads: fintok and finance, gaming, AI and tech, comedy, lifestyle and wellbeing. Do not open in beauty against entrenched platforms.

Monetization. Commission on brand-deal value (industry precedent 15% to 30%, up to 40% for high-demand creators), plus an optional monthly retainer of $3,000 to $20,000+ for brands that want sourcing as a service (Favikon).

> **IMPLICATION**
>
> The database is bought; the badge is built. Spend the first ninety days on the badge.



TRACK B · GEN Z BRAND CONSULTANCY

HIGHEST NEAR-TERM REVENUE PER CLIENT

Sell genz.tv's research and matching capability as strategic advisory: how should your brand talk to, and partner with, Gen Z. Package it the way the consulting firms do, but deliver it faster, cheaper, and with deeper creator-network access than Deloitte, Accenture or McKinsey can offer a mid-market client.

Service tiers follow precedented pricing: hourly consulting at $100 to $300+ for small engagements; flat-fee campaign strategy projects from $5,000 to $100,000+ by scale; monthly retainers of $3,000 to $20,000+ for ongoing Gen Z strategy and creator sourcing (Favikon).

Deliverables: Gen Z audience and culture briefings, creator shortlist and vetting reports, measurement frameworks built on full-funnel attribution (per BCG) rather than vanity metrics, and a standing "trend radar" because Gen Z taste moves faster than a quarterly review cycle.

Differentiator versus the Big Six: speed, focus and direct network access. A Fortune 500 client hiring Deloitte for a Gen Z engagement pays enterprise rates and often waits months. genz.tv serves the much larger population of mid-market and DTC brands that need the same thinking and cannot justify, or do not need, a Big Six engagement.

TRACK C · GENZ.TV ORIGINAL CHANNEL AND SHOWS

LONGER HORIZON, HIGHEST BRAND-EQUITY PAYOFF

Use the domain's positioning to launch owned content: a channel of shows built around, and starring, the creators in the repository. This mirrors what EY calls the shift toward creators owning IP and what Accenture calls creator-led commerce. Instead of only placing creators into brand deals, genz.tv produces and owns shows, adding a second revenue line (advertising, sponsorship, platform payouts) and a flywheel: the channel becomes both a discovery funnel for new creators and a live showcase for brands weighing a partnership.

Deloitte's 2025 Digital Media Trends found 56% of Gen Z say social content feels more relevant than traditional entertainment, and about half feel closer to creators than to traditional celebrities. A genz.tv-branded format (talk show, competition, docuseries following creators building a business) has a receptive built-in audience. Expedia's year-long IShowSpeed partnership, whose 12-hour livestream reached 400 million people, is the current proof that a creator-led format can carry a brand alone.

SEQUENCING

Build Track C only after A and B have revenue and a real network. The content arm's credibility and casting pool depend on the repository already existing.

4.4 RECOMMENDED SEQUENCING

THE FIRST TWELVE MONTHS

MONTHS 1 TO 3

STAND UP THE REPOSITORY

Track A in 3 to 5 focus niches on Modash's API plus manual vetting. Begin outreach to build the first 200 to 500 "GenZ Verified" profiles. Write the vetting rubric down before the first profile goes in.

MONTHS 2 TO 6 (OVERLAPPING)

SELL THE CONSULTANCY

Track B engagements with 3 to 5 pilot brand clients, using the repository as proof of capability. This is the near-term cash flow that pays for data licensing while the repository scales.

MONTHS 6 TO 12

FORMALIZE AND DEVELOP

Commission and retainer contracts signed, repository categories expanded, and the first Track C show concepts developed around the strongest creators already in the network.

HOW THE MONEY STACKS

LINE	MECHANISM	PRECEDENT
Consulting	Hourly, project and retainer	$100 to $300/hr · $5K to $100K+ · $3K to $20K+/mo
Matchmaking	Commission on deal value	15% to 30% (up to 40%)
Sourcing as a service	Monthly retainer	$3K to $20K+/mo
Agency channel	Vetted shortlists licensed to boutique agencies	New; price against their 15% to 20% take
Original content	Sponsorship, ads, platform payouts	Track C, year two

DATA LICENSING RUNS $10,000-PLUS A YEAR BEFORE A SINGLE BRAND PAYS. TRACK B EXISTS TO MAKE TRACK A AFFORDABLE. SEQUENCE ACCORDINGLY.

EXIT CRITERIA FOR MONTH TWELVE

- 500+ verified profiles across 3 to 5 categories, each with a documented vetting record
- Three paying retainers, or the consultancy equivalent, covering data costs with margin
- Two boutique agencies using genz.tv shortlists as a sourcing input
- One show format piloted with creators from the repository

05 THE OUTREACH AND SOURCING PLAYBOOK

5.1 DISCOVERY INFRASTRUCTURE

Build the proprietary database on Modash's Discovery and Raw API ($10,000 to $16,200 a year). It is positioned for developers building third-party tools rather than only a closed SaaS seat, which is exactly the posture genz.tv needs. Use HypeAuditor's free fake-follower and engagement calculators, and Social Blade's earnings-estimate API ($19.99 a month plus usage via Apify), as supplementary checks with no extra licensing overhead.

5.2 VETTING RULES OF THUMB

SIGNAL	BENCHMARK
Genuine engagement (any tier)	1% to 3% is typical for a real audience (ContentGrip)
Nano (1K to 10K)	~5% to 8% engagement (OwlClaw)
Mega (1M+)	~0.5% to 1% engagement (OwlClaw)
Fraud red flags	Large follower count with disproportionately low likes and comments; generic bot-style comments; sudden unexplained follower spikes (GRIN)

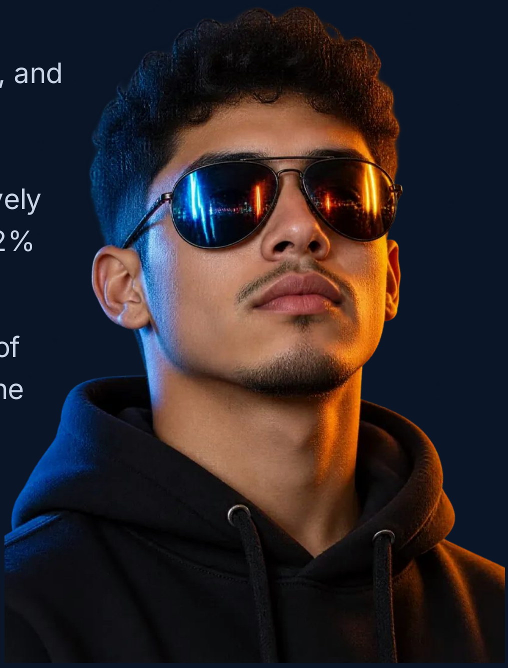
THE GENZ VERIFIED CHECKLIST

What a profile must pass before it carries the badge. Every line becomes a field in the database.

- **Engagement within tier range** on the last 30 posts, not the lifetime average
- **Audience demographics** from Modash confirm the audience is who the creator says it is
- **Three to five recent posts reviewed by a human** for authenticity red flags and AI-generated filler
- **Brand-safety scan** of the last 6 to 12 months of content, documented and dated
- **Age check** and jurisdiction flag for anyone under 18 (see 5.6)
- **Values and identity tags** captured from the creator, not inferred by the tool
- **Collaboration history**: which brands, how many times, and whether they renewed

> **WHY A HUMAN REVIEW STAYS IN**
>
> Sprout Social finds 40% of Gen Z unlikely to engage with AI-generated content. A badge that a model awarded on its own is worth less to the people it is meant to reassure.

5.3 OUTREACH TACTICS THAT ACTUALLY WORK



Reply-rate data consistently favours personalized email over cold DMs, and the gap widens as creators scale. Under 50,000 followers, DM-first performs best (12% to 20% replies to a personalized DM). Between 50,000 and 500,000, email-first wins. Above 500,000, email is effectively the only channel, because managers gatekeep DMs down to a 0% to 2% reply rate (ReachLit).

Personalized emails that reference two or more specific recent pieces of content get replies at 3 to 5 times the rate of mail-merge templates. One follow-up 5 to 7 days later adds 30% to 50% more replies. A third touch actively hurts response and reputation, so cap outreach at two (KOL Craft).

For high-value targets, start organic relationship-building (commenting, sharing, engaging with the creator's content) two to three months before pitching anything paid (Shopify). Negotiate content usage rights up front; post-hoc rights requests are always more expensive (Modash).

REPLY RATE BY CHANNEL AND TIER

Personal DM, <50K	12 to 20%
Manager email, managed	12 to 22%
Direct DM, 500K+	0 to 2%
Personalized email vs template	3 to 5x

ReachLit; KOL Craft. Bars are indicative, not to a common scale.

5.4 RATE BENCHMARKS TO SET CLIENT EXPECTATIONS

TIER	FOLLOWERS	TYPICAL RATE PER POST
Nano	1K to 10K	$100 to $500
Micro	10K to 100K	$500 to $2,500
Macro	100K to 1M	$2,500 to $10,000+
Mega	1M+	$10,000 to $50,000+

Later. Reels and TikTok formats run 20% to 30% above a baseline feed post; Stories about 50% below; whitelisting (running creator content as paid ads) adds 30%+. Finance creators command 2 to 3 times standard rates (Gigapay).

5.5 WORK WITH TALENT AGENCIES, NEVER AROUND THEM

Managed creators respond far better to a manager's email (12% to 22% replies) than to a direct DM (0% to 2%). Pitch genz.tv's outreach and vetting data as a service to agencies and managers that streamlines their own brand-deal sourcing. Digiday's read of the market is that the boutique tier in particular is hungry for exactly this kind of input.

5.6 COMPLIANCE, BUILT IN FROM DAY ONE

The FTC's Endorsement Guides require disclosure of any financial, employment, personal or family relationship with a brand, including free products, tags and pins, and the disclosure must sit with the endorsement, not in a bio (FTC Disclosures 101). The FTC's Fake Reviews and Testimonials Rule, finalized in August 2024, bans compensation conditioned on sentiment and requires disclosure of insider and affiliate relationships. That applies directly to any seeding or UGC review program genz.tv runs for a client.

Because "Gen Z" spans roughly ages 14 to 29, a growing patchwork of state laws (California's Coogan Law and AB 1880, plus 2023 to 2025 statutes in Illinois, Minnesota, Utah, Arkansas and Montana) requires trust accounts and takedown rights for minor content creators. Onboarding needs an age check and a jurisdiction-specific compliance review for any creator under 18 (MultiState). Review this with counsel before the first minor is onboarded, not after.

Outside the US the same logic applies with different paperwork. The UAE requires an advertiser permit for paid social content, and Saudi Arabia licenses influencers through its media regulator; both markets expect disclosure norms at least as strict as the FTC's. A GCC brand reading this guide should assume the checklist below plus a local licence check.

COMPLIANCE CHECKLIST

- Disclosure language templated into every brief and every contract
- No compensation tied to the sentiment of a review, ever
- Affiliate and insider relationships disclosed at the point of endorsement
- Age verification at onboarding; under-18 profiles routed to a legal review queue
- State-by-state minor-creator obligations tracked and re-checked quarterly
- Usage rights and whitelisting terms agreed before content is made

IMPLICATION

Compliance is a selling point to the brands that have been burned. Put it on the badge.

> ### GEN Z TRUST IS "FRAGILE, NUANCED, AND RARELY GIVEN BY DEFAULT."
>
> **Paula Catoira**, CMO, Rival Group · Gen Z Trust Study, August 2026

06
CREATORS AND CAMPAIGNS WORTH CITING

A cross-section of named creators and campaigns to reference when pitching brands, across the categories where Gen Z influence is strongest.

CREATOR	PLATFORM	NICHE	WHY IT MATTERS
Alix Earle	Instagram	Beauty	L'Oréal Paris partnership kept her lo-fi, conversational style: "high reach, low gloss" (TTT News)
Charli D'Amelio	TikTok, Instagram	Dance, lifestyle	Dunkin' "The Charli", credited as the brand's most successful product launch in company history (Live Oak Communications)
Wisdom Kaye	Multi-platform	Fashion	Coach partnership built on "Gen Z luxury positioning"; acted as tastemaker and creative director, not endorser (TTT News)
Humphrey Yang	TikTok, Instagram	Fintok	3.3M TikTok followers; finance creators command 2 to 3 times standard rates (International Accounting Bulletin; Gigapay)
Kai Cenat	Twitch	Gaming	17M+ followers; subathon-style live streaming (Disrupt Marketing)
Jeff Guenther (@therapyjeff)	TikTok	Wellbeing	2.9M followers; therapist-turned-creator format (HireInfluence)
IShowSpeed	YouTube, live	Entertainment	Expedia's year-long "official travel partner"; one 12-hour livestream reached 400M+ people (Marketing Dive, 2026)

> "TRAVEL INSPIRATION TODAY COMES FROM CREATORS WHO BRING THEIR AUDIENCES ALONG IN REAL TIME." AND, ON THE RESULTS: "CREATORS ARE A CHANNEL IN THEIR OWN RIGHT."
>
> **Natalie Wills**, SVP Brand Marketing & Creative, Expedia Group · Marketing Dive, April and July 2026

FIVE CAMPAIGNS FROM THE LAST TWELVE MONTHS

Coach, "Explore Your Story" (spring 2026). Co-created with Gen Z community input on narrative and cultural framing, it accompanied a roughly 40% year-on-year increase in Coach marketing spend and helped drive a 25% brand revenue increase for parent Tapestry in fiscal Q2 2026 (Marketing Dive). By Q3, CEO Joanne Crevoiserat said the campaign "won its target Gen Z consumer on all metrics," with revenue up 31%.

Aerie, "100% Aerie Real" (H1 2026). Record first-quarter revenue and more than $2 billion trailing twelve months. The Aerie Realmakers creator community "exceeded six-month targets within weeks" (Marketing Dive H1 roundup).

e.l.f. Beauty (fiscal Q1 2027, reported August 2026). CEO Tarang Amin: "We're the #1 brand amongst Gen Z, Gen Alpha and millennials," built on a "community-led innovation model" the company calls one of its most durable advantages. Unaided awareness went from 13% to 45% in a few years; marketing and digital investment ran at 22% of net sales, guided toward the top of 23% to 25% for the year.

Audible, BookTok (2026 Adweek Brand Genius). 1.3 billion impressions and 600% growth in total listening hours from a creator-led campaign that met readers where they already were.

Expedia and IShowSpeed (April 2026). A year-long partnership rather than a post. The 12-hour livestream reached 400 million-plus people and put "official travel partner" language on a creator for the first time at that scale.

> **"MASS MARKETING AND MICHAEL JORDAN AND THAT BEING THE THING THAT CARRIES THE BRAND AND CREATES A HALO FOR EVERYTHING, I THINK THAT'S OVER."**
>
> **Nate Jaffee**, SVP Integrated Strategy, Praytell · on Nike's comeback, Marketing Dive, May 2026

WHAT THE WINNERS SHARE

- The creator had a role, not a slot: creative director, community lead, travel partner
- The relationship ran for months, with renewals built in
- Results were reported in revenue and listening hours, not impressions alone
- The brand let its own gloss drop to match the creator's register

SECTION 07

RISKS AND OPEN QUESTIONS

Market-sizing ambiguity. Published creator-economy figures range from $235 billion to more than $600 billion depending on methodology (Gigapay). Any investor-facing pitch should cite one source and its definition rather than a single headline number. Search behaviour is a second trap: 65% of Gen Z have used TikTok as a search engine, yet only 4% now say they are more likely to rely on TikTok than Google, down from 8% in 2024 (Adobe Express survey via Search Engine Journal).

Consolidation pressure. Accenture and CreatorIQ are actively buying creator infrastructure. Expect well-funded, professionally staffed competitors from day one; differentiation on Gen Z-specific trust data and speed-to-market for mid-market clients is essential, not optional.

Category trust is fragile. Only 31% of Gen Z trust influencers as a group, and Rival's Paula Catoira describes Gen Z trust as "fragile, nuanced, and rarely given by default." Kantar finds only 27% of creator content ties strongly to the brand paying for it. A verification badge that is ever caught being wrong loses its value for every creator wearing it.

Minor-creator compliance is a fast-moving, state-by-state legal area (MultiState). Review with counsel before onboarding anyone under 18.

Data licensing costs. Modash and similar APIs run $10,000-plus a year, so the repository needs early consultancy revenue (Track B) or outside funding to bootstrap the database before it sustains itself.

AI content and ad avoidance. 41% of US 18-to-24-year-olds use ad blockers, the highest of any age group (eMarketer via Backlinko), and 40% of Gen Z say they are unlikely to interact with AI-generated content (Sprout Social). Human creators are the ad format this audience still lets in; the repository has to keep them human.

OPEN QUESTIONS WE COULD NOT CLOSE

- No verifiable 2026 primary-source quote from Nike, Apple, Coca-Cola, Spotify, Sephora or Samsung marketers on Gen Z creators; agency voices are used and labelled as such
- No reputable primary source for a 2026 Gen Z "attention span" figure, so it is left out

> "TRUST IS NO LONGER BUILT IN THE CROWD. IT IS EARNED IN THE CIRCLE."
>
> **Edelman** · 2026 Trust Barometer, "An insular world"

DON'T CHASE CULTURE. GET IN.

The Big Six have told brands what to do. Almost nobody has built the thing that lets a mid-market brand actually do it. That is the company.

Ten commitments, written to be held against us.

01 **Gen Z-native, always.** Every profile, every brief, every show is built for this audience first, not retrofitted.

02 **Verified means verified.** A human reviewed it, the date is on file, and the badge comes off when the evidence changes.

03 **Mid-tier and nano before mega.** BCG's ROI data and Deloitte's renewal data point the same way. We follow it.

04 **Identity is a matching signal.** Values and audience fit sit beside category and follower count, never behind them.

05 **Relationships, not bookings.** We are paid on renewals and lifecycle, so we design for them.

06 **Full-funnel numbers or nothing.** UTM, affiliate, conversion. Impressions are a diagnostic, not a result.

07 **Complement the agencies.** We feed shortlists to boutique managers instead of fighting them for their clients.

08 **Buy the plumbing, build the moat.** Licensed data underneath; proprietary trust and vetting on top.

09 **Compliance is a feature.** FTC disclosure, minor-creator protections, and usage rights handled before content exists.

10 **Own a stage.** When the network is real, GenZ.tv shows put our creators in front of the brands we want.

CULTURE
WHERE IT STARTS

COMMERCE
WHERE IT PAYS

CREATORS
WHO CARRIES IT

REAL IMPACT
HOW WE'RE JUDGED

SOURCES AND METHOD

Primary sources were fetched directly from the publishing organizations during September 2026 research. Where a figure came from a secondary summary, the secondary source is named. Ranges are left as ranges. Nothing here has been rounded to make a slide look better.

CONSULTING AND RESEARCH FIRMS

Accenture Newsroom, Whalar acquisition (2026); Accenture Life Trends; Accenture creator research via Tech Times. BCG creator-economy research (1,900+ consumers, 60+ brands) via mediabrief; BCG Gen Z / Gen Alpha fashion research. Deloitte Creator Economy research; Deloitte 2025 Digital Media Trends (via Thought Leaders). EY 2026 Media & Entertainment outlook; EY Gen Z study (2023). McKinsey Gen Z spending and creator research. PwC, referenced for consensus themes.

MARKET SIZING AND SPEND

Grand View Research, creator economy market report. Goldman Sachs, creator economy TAM (2023). Gigapay, 2026 sizing roundup and budget-share data. eMarketer, US influencer marketing spend; "FAQ on social commerce" (20 Jan 2026). IAB, 2025 Creator Economy Ad Spend & Strategy Report (via Creator Business Daily, 25 Jul 2026). The Influencer Marketing Factory, 2025 funding. Ogilvy 2026 Influencer Trends. Kantar Marketing Trends 2026 (23 Jan 2026). Bank of America Institute, Gen Z income. NielsenIQ, Gen Z spending power. PopulationPyramids.org, US demographics.

TRUST AND BEHAVIOUR

Clutch.co, purchase likelihood by generation. LTK Gen Z Shopper Study; LTK × Northwestern Retail Analytics Council CMO study (Business Wire, 17 Sep 2025). IAB 2026 Creator Impact Report. Salsify via eMarketer. Edelman 2026 Trust Barometer: "An insular world: trust and creators" (13 Mar 2026) and Brand Special Report 2026; Sara Rezaee interview via Yahoo Creators. Rival Technologies Gen Z Trust Study (PR Newswire, 27 Aug 2026; n=903, ages 18 to 29, US and Canada). Sprout Social Pulse Surveys, Q2 and Q3 2025, Q1 2026. Morning Consult via CNBC (influencer aspiration); Morning Consult short-form video (29 Apr 2025). Adobe Express survey via Search Engine Journal (25 Feb 2026). Backlinko ad-blocker roundup (19 Mar 2026), citing eMarketer and DataReportal.

COMMERCE AND PLATFORMS

Momentum Works, "TikTok Shop in the U.S. 2025" (Feb 2026) and Momentum Works × Tabcut H1 2026 report (6 Aug 2026); Contentgrip TikTok Shop analysis (24 Jun 2026); Net Influencer (10 Aug 2026). CreatorIQ Creator-Powered Funnel Report (10 Jun 2026). YouTube Shorts 200 billion daily views, Cannes Lions 2025 via Search Engine Journal. 5WPR Beauty & Wellness report via Net Influencer (25 Jun 2026). Voxbooster, category share and paid amplification.

COMPETITORS, AGENCIES AND RATES

GRIN, CreatorIQ, Later, Aspire, Creator.co, Upfluence, Modash, Traackr, Captiv8 public pricing and product pages. PRWeek (CreatorIQ–Tribe Dynamics). GCI Magazine (SuperOrdinary–Fanfix). Contentgrip funding and acquisitions roundup (25 Jun 2026). Digiday, talent representation. Dots (usedots.com), manager commissions. ANA via MediaPost, agency share of spend. Favikon, consulting and retainer pricing. Nerds Collective, commission precedent. Later, rate benchmarks and format multipliers. ReachLit and KOL Craft, outreach reply rates. Shopify and Modash, relationship and rights guidance. HypeAuditor; Social Blade API via Apify. ContentGrip, OwlClaw, GRIN, MakeInfluence, MicroInfluencers, vetting benchmarks.

CASES AND QUOTES

Marketing Dive: Coach "Explore Your Story"; Expedia × IShowSpeed (29 Apr 2026); "Best brand campaigns of H1 2026" (7 Jul 2026); Nike marketing analysis (12 May 2026). e.l.f. Beauty Q1 FY2027 earnings call transcript (12 Aug 2026, via The Motley Fool). Adweek 2026 Brand Genius (7 Apr 2026). TheWrap creator predictions for 2026 (via Yahoo). TTT News, Live Oak Communications, International Accounting Bulletin, Disrupt Marketing, HireInfluence, creator profiles.

LAW

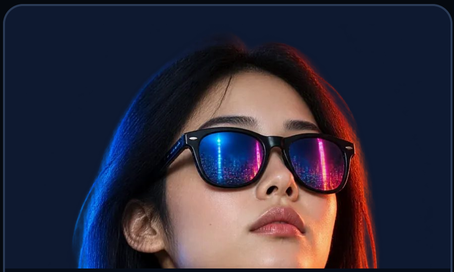
FTC Endorsement Guides and "Disclosures 101"; FTC Fake Reviews and Testimonials Rule (final, Aug 2024); MultiState, minor content creator laws by state.

A NOTE ON CONFIDENCE

Items read on the publishing organization's own page are treated as high confidence. Items read through a secondary summary (IAB spend totals, Momentum Works 2025 GMV, 5WPR seeding thresholds, ad-blocker shares) are medium confidence and are labelled with the secondary source. The 2024 TikTok Shop US figure on page 6 is derived from the reported 2025 growth rate, not reported directly.

GENZ.TV

NINE PERSPECTIVES
ONE SIGNAL

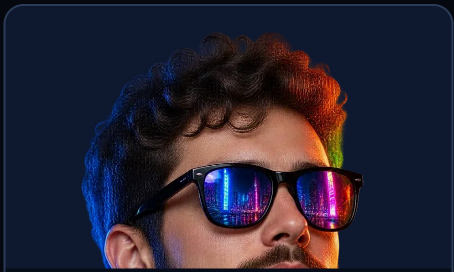


01 ASIAN WOMAN

TECH FORWARD. CULTURE FIRST.

02 WHITE WOMAN

BOLD CREATIVITY. REAL IMPACT.



03 WHITE MAN

STREAMS. BUILDS. INSPIRES.

04 BLACK MAN

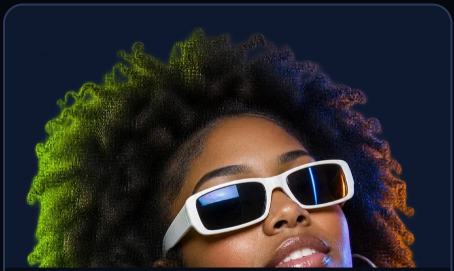
CULTURE BUILDS OPPORTUNITY.

05 HISPANIC WOMAN

REAL PEOPLE. GLOBAL REACH.

06 LEBANESE WOMAN

DUBAI MINDSET. GLOBAL INFLUENCE.



07 BLACK WOMAN

CREATIVE ENERGY. REAL CHANGE.

08 ASIAN MAN

IDEAS TRAVEL FASTER HERE.

09 LATINO MAN

MORE CULTURE. BIGGER TOMORROW.

REAL PEOPLE. REAL INFLUENCE.

GenZ.tv is the creator intelligence, strategy and activation layer for brands that want the next generation of growth. This guide is the research behind it.

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