



# WHAT CONSUMERS THINK

**ABOUT INFLUENCER MARKETING**





# EXECUTIVE SUMMARY

## **The majority of millennials have been influenced by a social media content creator**

61% of people aged 18 to 34 years, admit they have at some point been influenced in their consumer decisions by a social media content creator. US respondents are more likely to have been influenced than those in the UK.

## **Mid-tier influencers hold the most appeal to the younger generation**

Consumer preferences are quite nuanced when it comes to determining the type of influencer they prefer to hear from, however a small majority of 21% claim that mid-tier influencers hold the most appeal.

## **Almost 30% of digital natives say influencer content encourages them to impulse-buy**

28% of respondents say that influencer content has persuaded them to click-through and buy a product immediately, which they otherwise wouldn't have bought.

## **61% of consumers say authenticity is the most important attribute in an influencer**

61% of consumers say that having the ability to create authentic, engaging content is the most important attribute in a social media influencer.

## **79% of consumers prefer influencer content to celebrity endorsements**

79% of consumers "strongly" or "somewhat" agree that they prefer influencer content over and above celebrity ads or endorsements, for the fact that it offers better exposure to real life examples.

## **Influencers offer the biggest opportunity for new independent brands**

61% of consumers say that being introduced to new independent brands is the most common way in which digital influencers have impact for them.

## **70% of consumers believe it is important for influencers to have a natural affinity with a brand**

70% of consumers "strongly" or "somewhat" agree that it is important influencers have a natural affinity and shared values with the brand they are endorsing; a view supported by 92% of digital marketers also.

## **Consumers rank the authenticity of influencer content as their number one concern**

The question of authenticity emerges as the greatest concern in influencer marketing right now, for 44% of consumers, while 46% say that content needs to be more authentic and engaging, for them to trust and buy into influencer-led campaigns in the future. It is therefore unsurprising that a few months on, industry respondents rank 'fake followers' as their number one concern with influencer marketing. Fraud detection is a key challenge which the entire industry needs to take a stand against.

## **Consumers value the relatable content that micro and mid-tier talent produce**

The greater appeal of mid-tier influencers is largely due to the more relatable content that they are seen to produce, say 61% of consumers, while 43% feel they are better at engaging them in conversation than other types of influencer.

## METHODOLOGY

This research report is published by Influencer Intelligence, in association with Econsultancy, and explores the attitudes and perceptions of young consumers towards digital influencers. It follows on the heels of the Influencer Marketing 2020 report, published recently, which is a study of the digital marketer's view on influencer marketing. There were 500 consumers, aged 18 to 34 years, who responded to this research request, which took the form of an online survey. Research was carried out in the UK and the US, in September 2018.

If you have any questions about the research, please contact Influencer Intelligence's Content Marketing Coordinator Jessica De Moncuit at **[jessica.demoncuit@centaurmedia.com](mailto:jessica.demoncuit@centaurmedia.com)**

# INTRODUCTION

The way young people perceive digital influence is critical to the future of influencer marketing. Brands are aware that they are having to work harder and smarter than ever before to connect and engage with today's youth who are a savvy, forward-thinking generation, taking world issues and ethical matters seriously. For influencer marketing to keep pace, it needs to be sincere and tap into the areas of influence that really matter to this group of consumers.

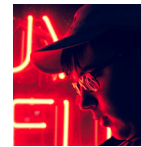
**The Influencer Marketing 2020 report<sup>1</sup>, published very recently by Influencer Intelligence**, found that for approximately six in 10 of the digital marketers surveyed, the purpose influencer marketing serves for their business has changed in the last 12 months, with **56% claiming the younger generation of consumers is proving the biggest driver of change**. Young people have come to more firmly reject the way that influencer marketing has been done over the past few years and are instead demanding higher levels of authenticity and relevance.

In addition, young people have seen social media influencers get it wrong too often and be publicly ridiculed for their mistake; which means the novelty of having 'influence' and their appetite for this has waned. Consequently, the **digital-born generation is now more passionate about other things, such as the environment, and for them to remain switched-on to influencer content, there must be strong evidence of organic advocacy**. Brand and influencer collaborations cannot seem too forced or commercially engineered, and it is crucial that there is already some natural affinity to the brand.

The millennial generation today represents the world's most powerful group of consumers: a moment that has been tensely anticipated by brands and businesses. This group has reached what economists call **"the most important age range for economic activity"**, when properties are purchased, babies are born, and money is spent on household purchases as well as lifestyle. **Global millennial spending power is forecast to overtake Generation X by 2020 and will continue to rise**. Technology and the internet are also core to this group of individuals, and those at the latter end of the age spectrum have grown up with social media and smartphones being an intrinsic part of their daily lives. It is critical, therefore, that digital marketers embrace the tastes and preferences, and **content consumption habits of this generation**, and ensure this sits at the heart of all influencer marketing programmes moving forward.

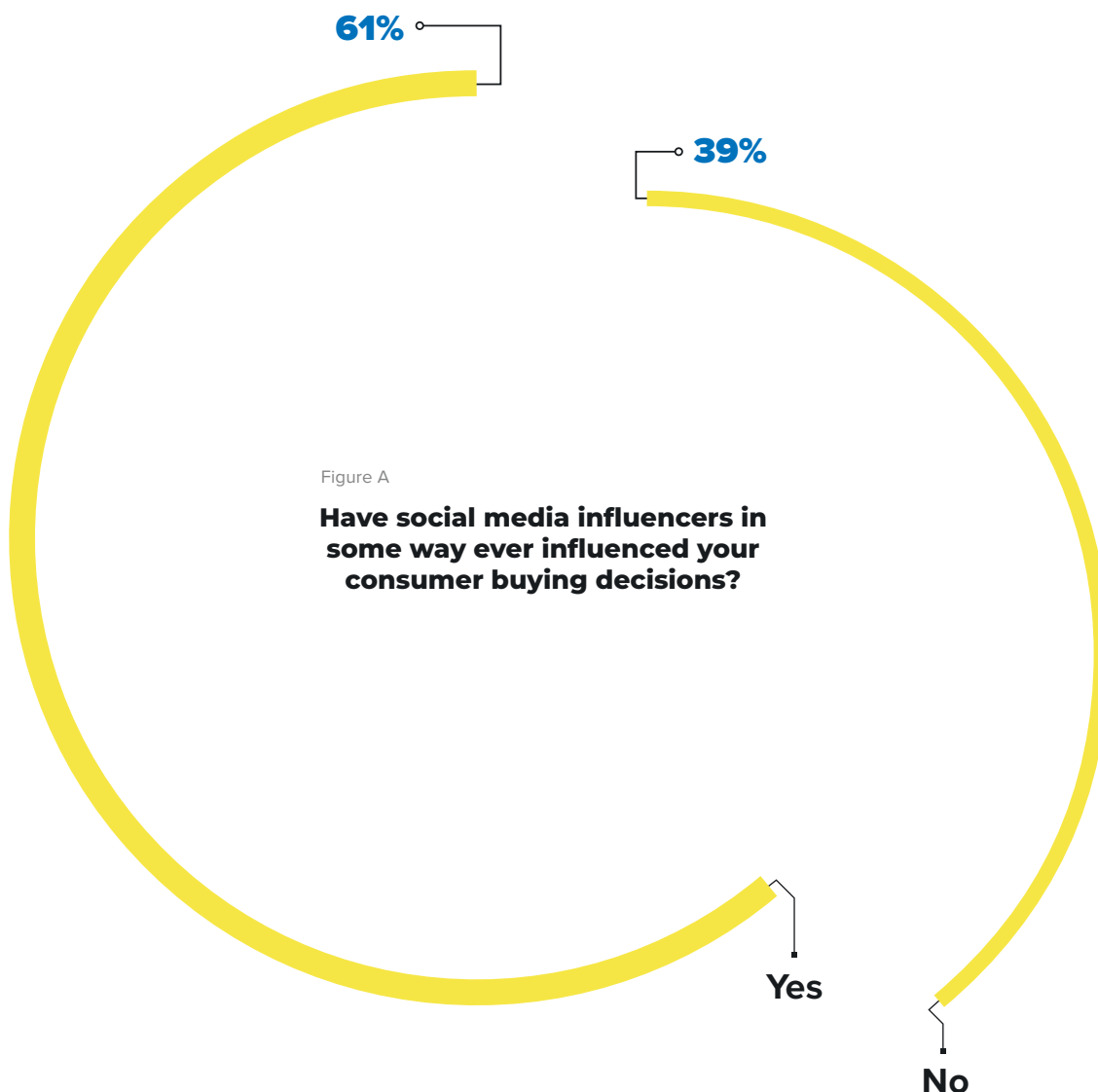
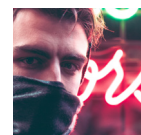


# KEY FINDINGS



## The majority of millennials have been influenced by a social media content creator

As Figure A below reveals, the younger generation aren't opposed to being persuaded, and **61% of young people aged 18 to 34 years, admit they have at some point been affected in their consumer decisions by a social media influencer.** US respondents (71%) are more likely to have been influenced than those in the UK (51%). US men (74%) are also more likely to say 'yes' than US women (68%), but the inverse is true in the UK with **43% of men saying 'yes' compared to 56% of women.**



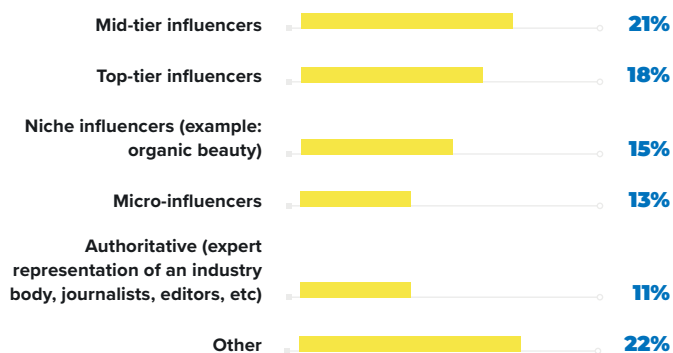
## Mid-tier influencers hold the most appeal to the younger generation

The survey of digital marketers within the recent Influencer Marketing 2020 report, published by Influencer Intelligence, revealed that **micro-influencers, or those with less than 100,000 followers, are in highest demand, while top-tier talent boasting a global presence are the least sought after.** Consumer preferences, however, seem more nuanced, with a smaller overall majority of **21% claiming that mid-tier influencers hold the most appeal** (see Fig. B). The recently published Young Blood 2 study, which marks the second instalment of research into Britain's youth culture, found that *"celebrity endorsement has become even less influential than it was in 2016, with 64% of our audience feeling it is unimportant, and that number rising with age."* It uncovered that for a brand to be seen to be *"on trend"* these days, it is less about being on social media and associating themselves with a celebrity face, and more about showing allegiance with key global issues such as **ethical production, carbon footprint reduction and progressive values overall.**<sup>2</sup>



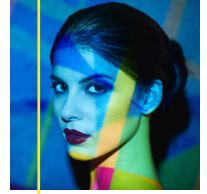
Figure B

### Which of the following social media influencers MOST appeal to you?





## Consumers value the 'relatable content' that micro and mid-tier talent produce

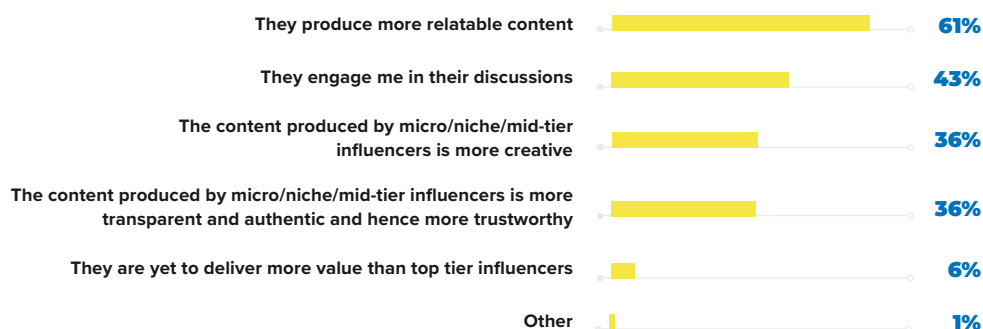


As Fig. C below reveals, that greater appeal of mid-tier influencers overall is largely due to the more relatable content that they are seen to produce, according to **61% of consumers**. **A further 43% perceive them to have higher levels of engagement than other types of influencer**, which many of the experts interviewed for the Influencer Marketing 2020 report agreed with. For example, **Lucy Lendrem, Head of Talent UK at Gleam Futures**, says *"with mid-tier talent we see some amazing levels of engagement and their potency and ability to sell product is significant."*

A notable **36% of respondents say the content produced by mid-tier and micro influencers** is more transparent and authentic, and therefore more believable. For some time, there has been a rise in the number of influencers producing editorial-level content, worthy of any luxury magazine; however, the tide is turning and across many vertical markets there is the pressing need for influencers and brands to instead 'keep it real' and depict a more honest view of reality. Breaking the data down further, US respondents (44%) are significantly more likely to value transparency than UK respondents (**26%**), and this is particularly the case with the men (**49% vs 13% respectively**).

Figure C

### What makes mid-tier social media influencers more appealing?





## Influencers offer the biggest opportunity for new independent brands

Over the past couple of years, digital influencers have increasingly demonstrated their willingness to share their passion and support for emerging indie brands and the values they stand for. **This has been especially true in the beauty sector** where there has been a recent surge of indie disruptors promoting clean, organic beauty and wellness; and while in the past it might have been hard for smaller brands to find the budget for quality marketing services and agencies, access to likeminded influencers has helped to create a much more level playing field. *"Now, indie brands have options and are able to work with passionate individuals who are happy to devote their talent and skills to their brand, and really elevate them."* says Mia Bell, founder and CEO of online beauty product discovery marketplace OPAL Avenue.<sup>3</sup>

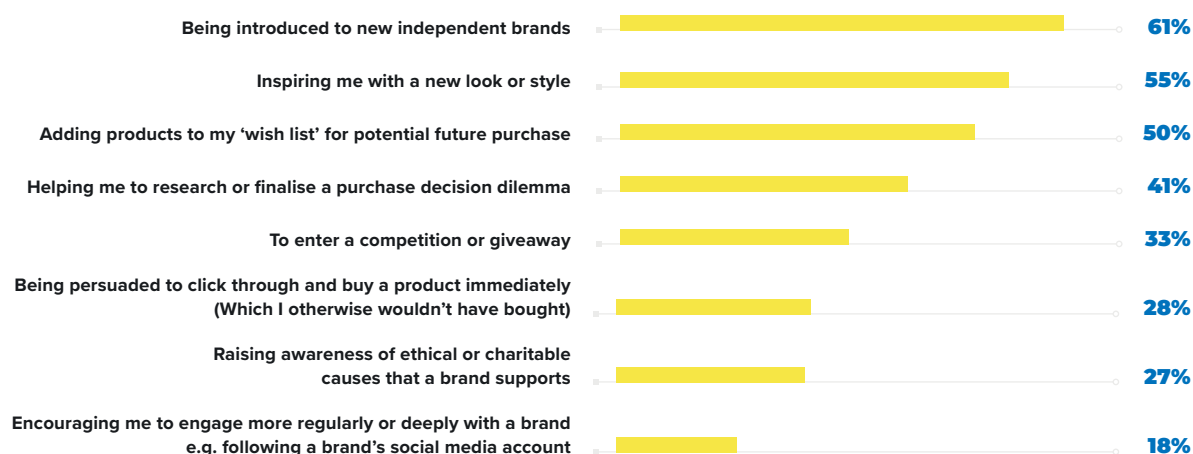
As Fig. D below highlights, **61% of consumer respondents say that being introduced to new independent brands is the most common way in which digital influencers have impacted them.**

Second to this is being inspired with a new look or style, according to **55% of respondents overall (although women are more likely inspired with a new look or style than men)**, while half admit that **influencer content has persuaded them to add a product to their 'wish list' for future purchase.** It is telling that **28% of respondents say that influencer content has persuaded them to click-through and buy a product immediately**, which they otherwise wouldn't have bought. However, 41% also say they have turned to the opinions of digital influencers to help them research or finalise a purchase decision. The consumer decision journey today is far less linear and more complicated than it ever has been, and there is a rising trend for consumers to actively 'pull' information helpful to them about a brand or product, which influencers can be very useful with.

**Sarah Evans, Head of Digital at Bottle PR,** shares: *"Historically clients have expected sales to come off the back of influencer collaborations immediately, but we are trying to articulate that, this is not necessarily the role influencer marketing plays. There are lots of channels and touchpoints in the digital marketing mix and influencer marketing should never replace any of that, but it supplements it well. For most clients, influencer marketing is now more about awareness and consideration and reaching particular audiences."*

Figure D

### In what ways are you most commonly influenced by social media influencer content?





## 61% of consumers say authenticity is the most important attribute in an influencer

As Fig. E reveals, **61% of consumer respondents say that having the ability to create authentic, engaging content is the most important attribute in a social media influencer.** UK women are more likely to cite this as a priority attribute than UK men (57% versus 42%). Additionally, **73% of US 18 to 24-year olds cite authenticity as an important attribute compared to just 44% of UK respondents in the same age bracket.** The importance of authenticity comes across strongly in the Influencer Marketing 2020 report also, with 68% of digital marketers saying that authenticity is key to influencer marketing success.

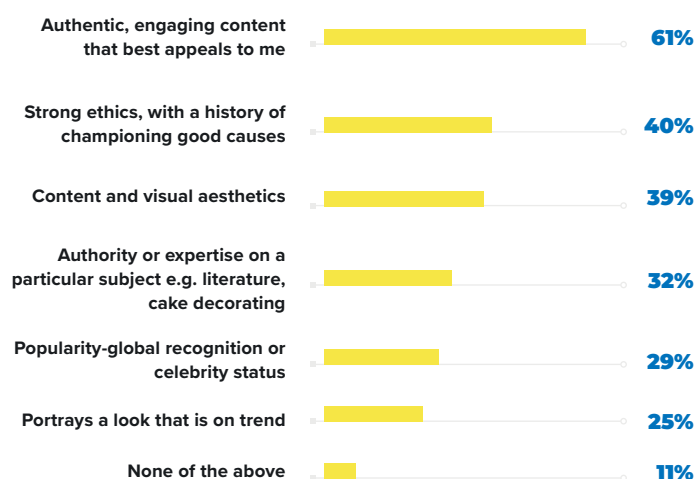
Many of the experts interviewed for the Influencer Marketing 2020 report expressed the need for brands to tell a compelling and sincere story, which goes behind the scenes of the business and beyond product, to focus more on the issues that they feel passionate about. The consumer survey supports this view, with **40% of respondents saying that strong ethics, with a history of**

**championing good causes, is the second most important attribute in an influencer.** *"Audiences are craving more substance and the more credible and discerning influencers will rise to the top in their brand collaborations,"* says **Sarah Evans, Head of Digital at Bottle PR.**

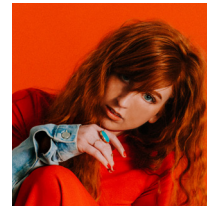
As a case in point, The Body Shop demonstrated the power influencers can hold in championing ethical causes last year when it launched its **'Forever Against Animal Testing' campaign, supported by the hashtag #ForeverAgainstAnimalTesting.** To raise awareness of its global online petition, The Body Shop collaborated with a traditional cast of celebrities such as Kelly Osbourne, actress Maisie Williams and Disney singer and actress Jhené Aiko, supported by a squad of social media influencers, incorporating local talent also. Diversity was crucial, and the brand selected individuals who stood for something and who had previously championed relevant causes, such as veganism and anti-fur. **A total of eight million signatures were needed to be able to present to the UN General Assembly,** to call on the launch of a petition to ban animal testing at a global level. On 31st August this year, The Body Shop was able to do just that. *"It was a real movement of influence, which has the potential to make a difference to the entire world,"* says Suri Singh, influencer expert at ITB Worldwide.

Figure E

### Which of the following do you think are the most important attributes of a social media influencer?



## 79% of consumers prefer influencer content to celebrity endorsements

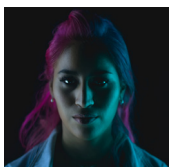
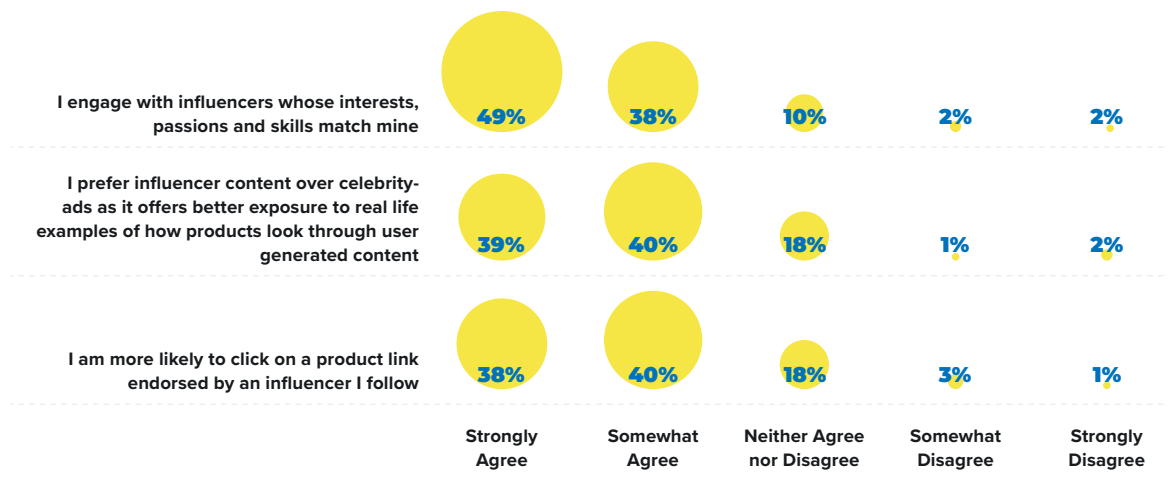


The previous Fig. E shows that popularity or global recognition hold less clout these days, with only 29% of respondents citing it as an important influencer attribute. The findings in Fig. F below support this view further, with 79% of consumers “strongly” or “somewhat” agreeing that they prefer influencer content over and above celebrity ads or endorsements, for the fact that it offers better exposure to real life examples. This is a view that just 3% of respondents disagree with.

Additionally, 78% of consumer respondents agree that they are more likely to click on a product link endorsed by an influencer they follow, indicating how important influencer marketing has become as a touchpoint within the consumer decision-making process and proving that influencers have the potential to trigger the impulse to purchase. This creates a strong case for brands to invest in influencer marketing, if they aren’t already, and direct their spending towards these key moments of influence.

Figure F

### To what extent do you agree or disagree with these statements regarding your behaviour towards social media influencers?



## 70% of consumers believe it is important for influencers to have a natural affinity with a brand

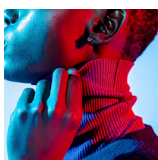
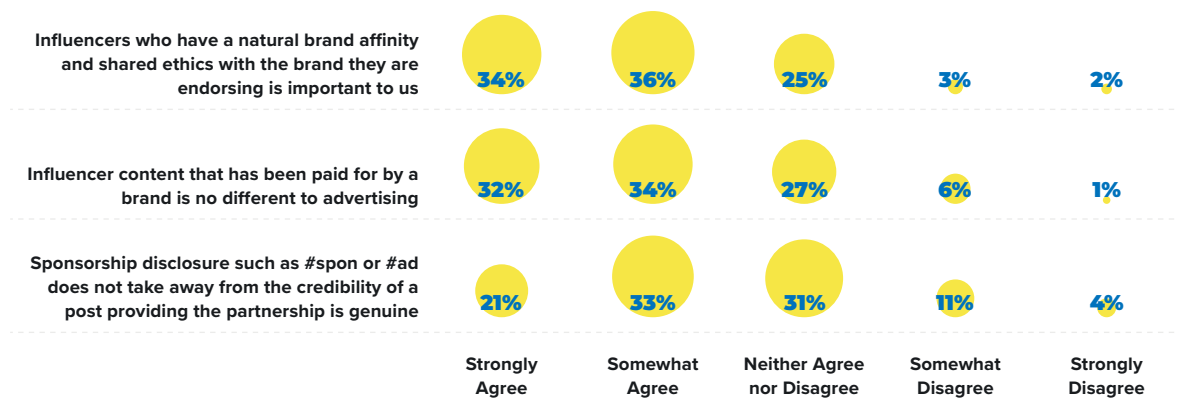
Many of the experts interviewed for the Influencer Marketing 2020 report claim contrived commercial partnerships are waning in favour of genuine, organic brand tie-ups where there is already some natural affinity or advocacy. In many cases, this equates to brands opting to work with influencers who are already fans of the brand and existing loyal customers, more recently including employees also.

As Fig. G below shows, **70% of consumers also “strongly” or “somewhat” agree** that it is important influencers have a natural affinity and shared values with the brand they are endorsing: a view supported by **92% of digital marketers according to findings within the Influencer Marketing 2020 report**. Consumers are savvy and are scrutinising brand collaborations very closely, calling an influencer out when a brand tie-up doesn’t come across as genuine. However, a point worth noting is that UK respondents are nearly 80% more likely to be neutral about the importance of a natural brand affinity and shared ethics than US respondents.



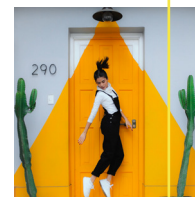
Figure G

### To what extent do you agree or disagree with these statements regarding your opinions of social media influencers?



## 54% of consumers agree that disclosures such as #ad and #spon do not diminish the credibility of content

The transparency of influencer collaborations concerns the industry and consumers alike. Just as 65% of industry marketers admit there is a blurry line between advertisements and genuine, organic recommendations there is similar audience scepticism, with **66% of consumers agreeing that paid-for influencer content is no different to advertising**. Over the years, as the influencer landscape has mushroomed it has become increasingly difficult to navigate, and consumers above all want to be clear on when an endorsement or review has been paid for or sponsored. **Encouragingly for brands, 54% of consumers “strongly” or “somewhat” agree that sponsorship disclosures such as #ad and #spon are unlikely to take away from the credibility of a post providing the partnership is genuine.**



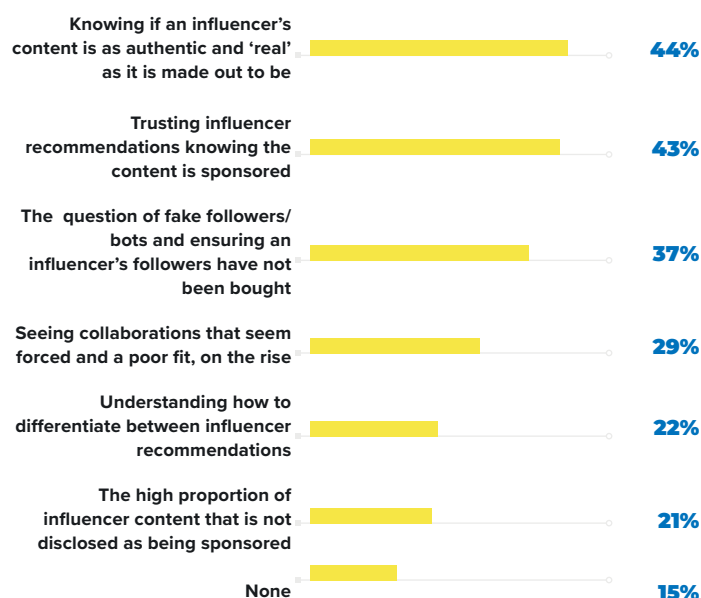
## Consumers rank the authenticity of influencer content as their number one concern

The question of authenticity is a recurring theme throughout both the Influencer Marketing 2020 report and the consumer survey, and there is little surprise that it emerges as the greatest concern in influencer marketing right now, for 44% of consumers (see Fig. H). **Furthermore, 46% of consumers say that content needs to be more authentic and engaging, for them to trust and buy into influencer-led campaigns in the future (see Fig. I).**

Combined with this, a further **43% of consumers admit they find it hard to trust influencer recommendations due to the lack of clarity around whether the content is sponsored**. Experts interviewed for the Influencer Marketing 2020 report agree that much can be done to improve clarity around disclosure guidelines, to keep pace with the industry as new tools and technologies emerge. **While guidelines are set by the Competition and Markets Authority (CMA) in the UK and Federal Trade Commission (FTC) in the US, experts claim there is a clear case for firmer rules, which would help to improve levels of trust particularly within the industry.**

Figure H

### What are your greatest concerns relating to social media influencer marketing, at present?





The question of fake followers and bots ranks highly as a concern for the industry (42% of respondents say it is their number one concern, within the Influencer Marketing 2020 report), and it is revealing that consumers are also troubled by it. While it has been an issue within the industry for quite some time and plagued other forms of digital advertising too, the matter has received a high amount of media attention recently driving **37% of consumers to say that they are troubled by the legitimacy of an influencer's following**. US men are twice as likely to question fake followers as a concern, compared to UK men. Within Fig. I below also, **28% of consumer respondents say it would take a clean sweep of influencer accounts to ensure there are no fake followers, for influencer marketing to be sustainable for them moving forward.**



Figure I

**What would it take for you to trust and buy into influencer-led campaigns/buy into them more?**



# CONCLUSION



The Influencer Marketing 2020 report, published recently by Influencer Intelligence, found that for **56% of industry respondents, the digital-native generation of customers is proving the biggest driver of change.** The opinions of this generation of customer really matter, and the survey findings point strongly towards the need for authenticity and transparency in brand collaborations moving forward, for this sector of marketing to be sustainable. As Bexy Cameron, Head of Insight at Amplify, argues: *"Brands should be the champions of authenticity. If they are brave and start to portray people realistically, especially in the UK where we have a progressive-thinking set of young people, it will really pay dividends."*

However, influencers must strive for authenticity also, or their young audiences will 'switch off', and they will lose the opportunity for future commercial deals. **A new wave of influencers are gradually filtering through who are more careful to work only with brands where there is natural affinity,** and who also take their ethical responsibility towards their youth audience very seriously, being careful to offer content that is honest and 'unfiltered'. With the abundance of research available to demonstrate the strong links between social media and mental health, for example, the next stage of influencer marketing needs to be characterised by greater truth and substance, which truly adds value to the young consumer particularly.

Ultimately, the **18 to 34 years demographic is challenging brands to work harder at their influencer marketing,** taking the time to forge well-thought-out relationships, and carrying out the necessary due diligence to ensure the influencer's following is legitimate. **Although there has been talk of a backlash within this demographic against influencer culture,** this generation is clearly still receptive to listen to the opinions of influencers, providing content is disclosed for what it is.



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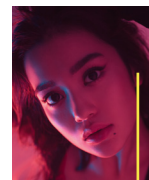
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