globalwebindex

Influencer Marketing

Exploring the current influencer marketing landscape and its future potential

TREND REPORT 2019

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Contents

Introduction

GlobalWebIndex Trend reports take a deep-dive into pressing topics for marketers and brands. In this report, we put a spotlight on influencer marketing.

We answer questions like:

01 What contributed to the rise of influencer marketing?

02 Who is engaging with influencers?

03 Which social media platforms hold the most potential for influencer marketing?

04 What types of content are consumers engaging with the most?

05 What impact do influencers have in the purchase journey?

06 How big of an issue is influencer fraud? And what are brands doing about it?

METHODOLOGY

When reading this report, please note that we use a mixture of global data from our ongoing quarterly global research, as well as data from a bespoke study conducted only in the U.S. and UK. This bespoke study's objective was to dig deeper into more specific areas of influencer marketing not covered in our global research. In this study, we interviewed 2,767 respondents in the U.S. and 3,568 respondents in the UK.

For more information on GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please click **here**.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Key Insights

Around 20% of global internet users use social media to follow celebrities or celebrity news, increasing to 26% among Gen Zs. This highlights how ingrained celebrity culture is in our lives.
Gen Z are the key target audience for influencer marketing. Not only do they spend the most time per day of all generations on social media and on their mobiles, they're the generation most likely to follow celebrities from a range of entertainment fields – such as films, music and comedy – on social media.

Instagram takes the throne for influencer engagement among Gen Z and millennials in the U.S. and UK.
These audiences are highly engaged with visual, video-based content, which is also why watching vlogs and videos are the most popular forms of content among these generations vs. older users. Instagram is the perfect platform for influencer marketing – it's highly visual by design, and its Stories feature allow influencers, of any kind, to get creative. We've found consumers in the U.S. and UK are highly engaged with influencers on social media, and even more importantly, men are engaging with influencers just as much as women are.

Influencers play a role in the purchase journey, most notably for brand discovery and product research at the moment; but we can expect to see social media play a more prominent role in closing the purchase loop in the future.
Social media is now the primary channel for brand and product research among Gen Zs. This highlights how our relationship with commerce has changed with the proliferation of social media into every part of our lives. And when it comes to inspiring purchase decisions, our bespoke research found that 17% of internet users in the U.S. and UK were inspired to make a purchase from an influencer's post on social media in the past month.

Trust is absolutely fundamental – 48% of Influencer Followers* in the U.S. and UK want influencers to be trustworthy.
Influencer fraud and fake influencers have stirred up their fair share of controversy. The consequences are significant; this issue dampens consumer trust and brands stand to lose serious money. We found consumers want influencers to be trustworthy above all else, which remained consistent across all generations. This highlights that trust and transparency are key to successful influencer marketing, and establishing these values really is the only way forward to win the hearts and minds – and wallets – of consumers.

*Influencer Followers refers to any internet user that engages with influencers on social media

It's not about the number of followers an influencer has, it's about the right fit.
Often many brands focus on the number of followers an influencer has as a way to demonstrate positive ROI, which has led to some influencers increasing their follower count using fake followers. But our data shows a greater number of followers doesn't equal consumer trust. In fact it's the opposite – over half of consumers actually trust influencers that have 50,000 or less followers the most. It's the smaller influencers that have the greatest and most exciting potential. Brands need to focus on the right influencer fit, not the number of followers.

01

Influencer Marketing

The Landscape of Influencer Marketing

Overview

Influencer marketing is a term we hear a lot, but what exactly is it? Influencer marketing refers to a type of social media marketing using celebrities, organizations or individuals that have a certain level of expert knowledge and influence in a specific area – from skincare and fitness routines, to technology and sports. The breadth of products influencers are promoting is vast, and many have built an empire as a result.

It's something that's exploded over the past number of years. **Some experts predict the influencer marketing industry will reach $10 billion by 2020.** Influencer marketing measurement company, Instascreener, reported an **83%** year-on-year growth in influencer marketing spend in the U.S. and Canada. And there's even the new Influencer Marketing Awards that successfully debuted this year, with plans to **return** in 2020.

But how did influencer marketing become so popular? The rise of influencer marketing is largely down to developments in social media, the dominance of mobile and digital content, the demand for video-led content, and the need for brands to reach consumers differently.

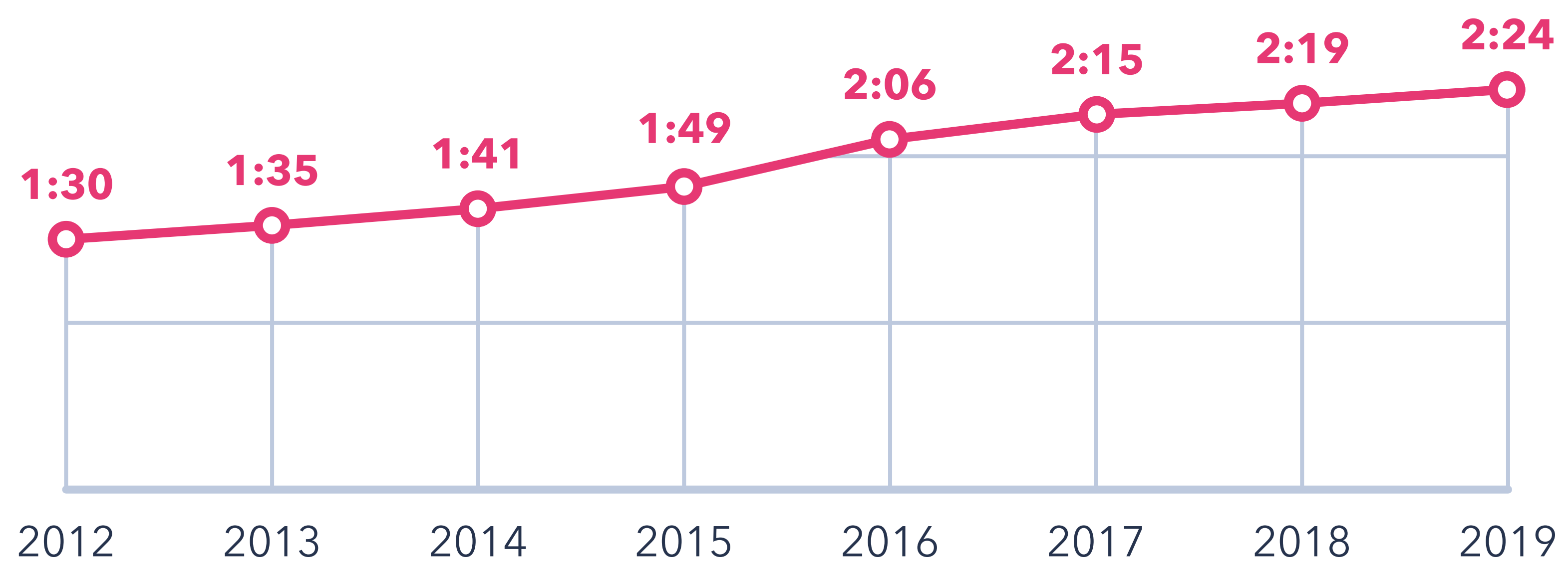
Our data shows just how far social media has grown. Back in 2012, global internet users spent an average of 1 hour and 30 minutes per day on social media. **Fast forward to 2019, and users are spending just under 2 hours and 30 minutes per day across social platforms.** This number jumps up for Gen Z (aged 16-22) who are spending just shy of 3 hours per day on social media. The rise in time spent on social media corresponds with the increased time spent on mobile.

The rapid proliferation of video across social media has been especially meaningful for Gen Z, who are highly engaged with video-based content. For example, 92% of Gen Z have watched a video clip or visited a video-sharing site and 61% have watched a vlog online in the past month, compared to just over 50% of global internet users.

Additionally, social media platforms have become more diverse and sophisticated over time. **Social media has evolved into something more than just keeping in touch with friends.** Consumers are turning to social media for activities like watching entertaining content, product research, and keeping up with the news more than ever before. This opens up great opportunities for brands and influencers alike.

THE GROWTH OF SOCIAL MEDIA

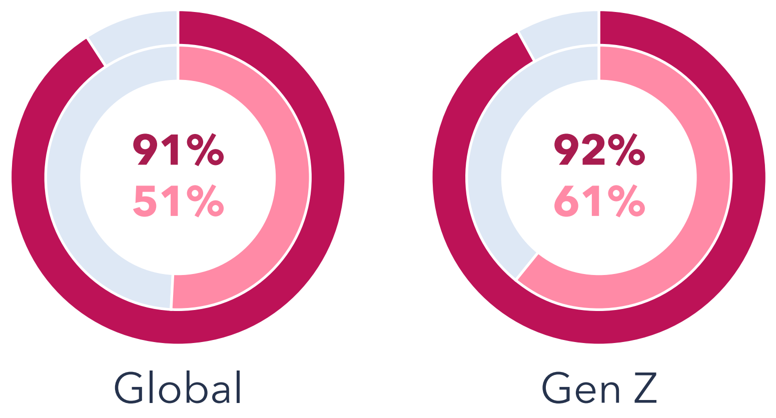
Average time spent per day (h:mm) on social media



THE DEMAND FOR VIDEO-DRIVEN CONTENT

% of internet users who have done the follow-ing things on the internet via any device in the last month

- Watched a video/visited a video-sharing site
- Watched a vlog



Gen Z are spending considerable time on mobiles – 4 hours and 9 minutes per day, compared to 3 hours and 22 minutes for the global average in 2019.

Question: On an average day, how long do you spend on social media? **Source:** GlobalWebIndex 2012-2019 (averages of all waves conducted in each year) **Base:** 1,918,553 internet users aged 16-64

Question: In the past month, which of the following things have you done on the internet via any device? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 internet users aged 16-64 & 21,121 internet users aged 16-22

02

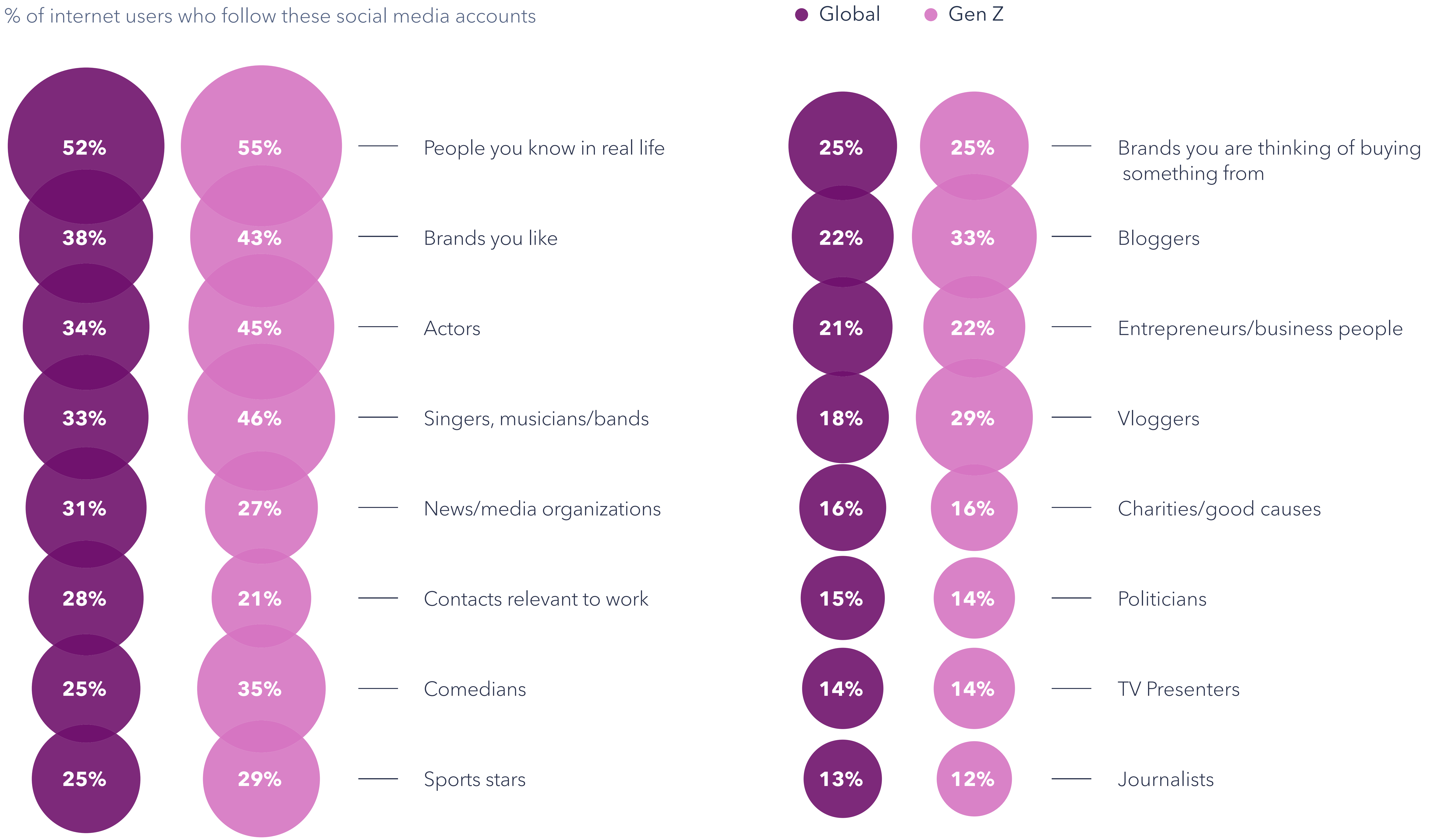
Influencer Marketing

Content that Resonates

Who is Engaging With Influencers?

"FOLLOWING" ON SOCIAL MEDIA

% of internet users who follow these social media accounts



Gen Z are much more likely to follow:

1.59 IDX	Vloggers
1.48 IDX	Bloggers
1.40 IDX	Singers/musicians /bands
1.40 IDX	Comedians
1.34 IDX	Actors

Questions: Who do you follow on social media? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 internet users aged 16-64 & 21,121 internet users aged 16-22

Who is Engaging With Influencers?

Influencer marketing can be a successful strategy, reaching consumers in a more experiential way that moves beyond traditional methods of advertising.

Celebrity culture has become completely embedded into consumers' daily social media lives. **Around 20% of internet users say they use social media to follow celebrities or celebrity news, jumping up to 26% among Gen Zs.**

Our data shows Gen Z is a key target group for influencer marketing. Using our **Social Media Segmentation**, we see the majority of Gen Zs fall into our *Celebrity Networkers** segment. Regionally, Latin America and Asia Pacific are the top two regions for *Celebrity Networkers* for all internet users. For Gen Z, Asia Pacific, Europe and North America posts the highest numbers of Celebrity Networkers.

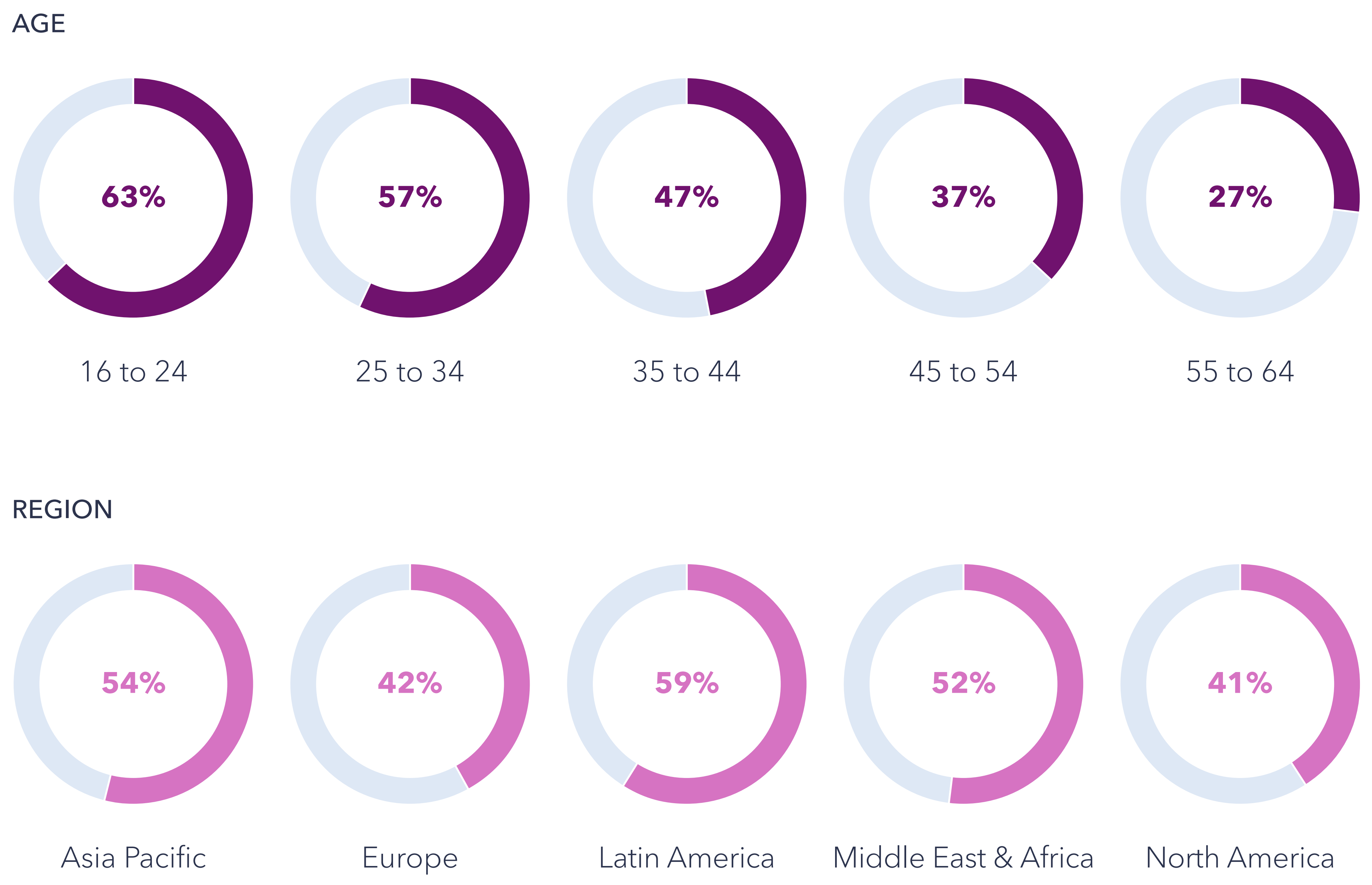
Gen Zs are more likely than the average internet user to follow celebrities across a range of entertainment fields – including film, music, and comedy – on social media.

We can see differences between what types of influencers Gen Z and millennials engage with. While Gen Zs are inclined to follow actors, musicians, comedians, and bloggers, millennials are more likely to be following politicians and work contacts on social media, reflecting where they're at in their life stage. The explosion of video media has been especially important for Gen Z. Compared to the average internet user, Gen Zs are 59% more likely to follow vloggers on social media.

Between 2015 and 2019, the number of Gen Zs following vloggers on social media grew by around 40%.

CELEBRITY NETWORKERS

% of internet users who fall into the Celebrity Networker segmentation*

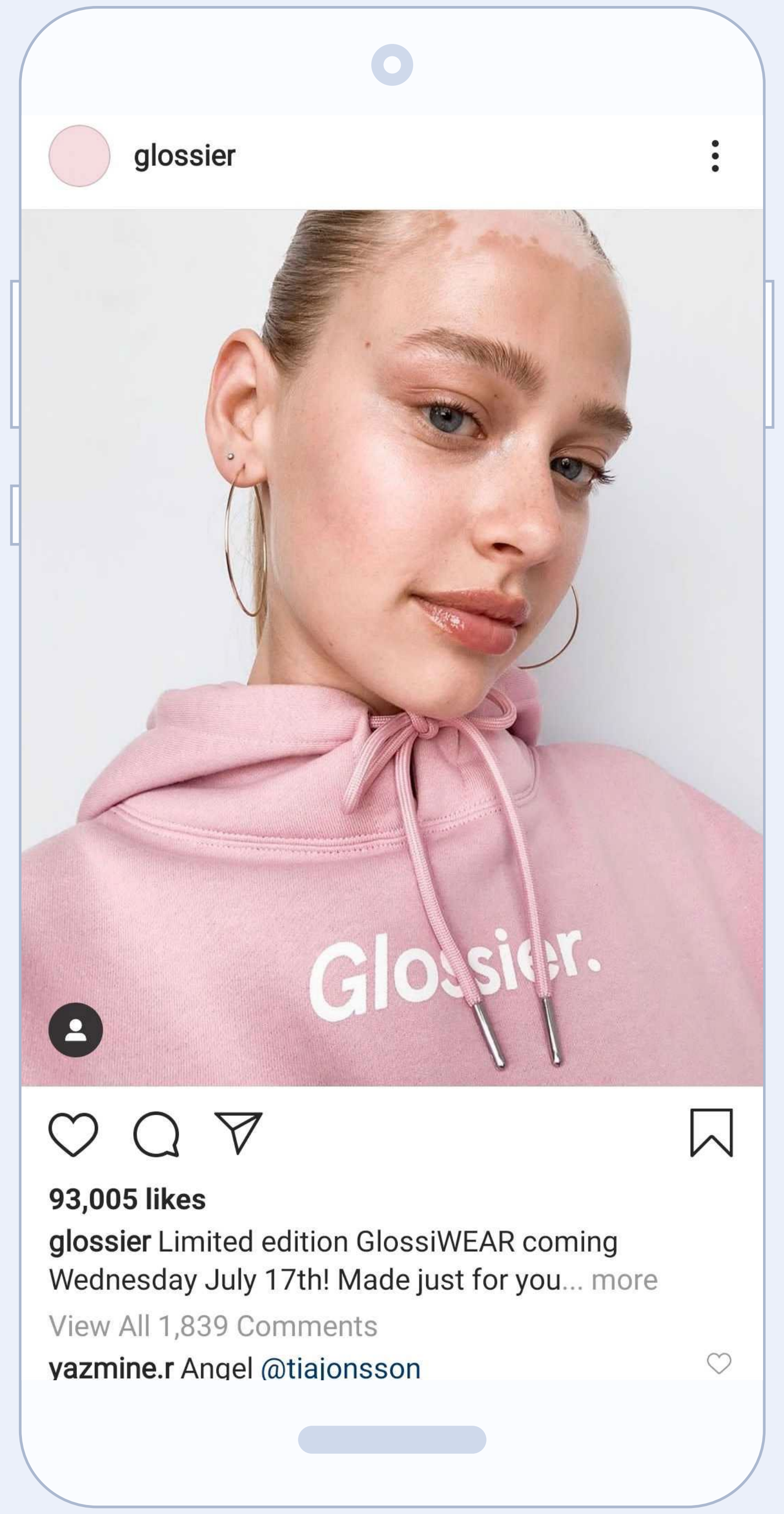


*Celebrity Networkers are people who say any of the following:

- They use social media to keep up with celebrities/ celeb news
- They follow actors, comedians, singers or TV presenters on social media.

Questions: What are your main reasons for using social media? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 internet users aged 16-64

Glossier Showing Their Realness



A brand that's managed to crack both millennials and Gen Z, cosmetics maker Glossier, has been wildly successful in its video-based Instagram advertising. Glossier ads reflect the brand's minimalist, fresh-faced aesthetic by featuring young models applying simple makeup and often embracing their imperfections. Glossier's collaboration with model/screenwriter/social influencer Coco Baudelle epitomizes much of the "realness" that Gen Zs value.

Where Does Influencer Marketing Hold the Most Potential?

WHERE IS THE GREATEST OPPORTUNITY FOR INFLUENCER MARKETING?

% of U.S./UK internet users who use these social media platforms for the following reasons

TOP PLAFORMS USED TO ENGAGE WITH FAMILY/FRIENDS	
Facebook	76%
Facebook Messenger	50%
Instagram	49%
Twitter	27%
WhatsApp	27%

TOP PLATFORMS USED TO FIND OUT MORE INFORMATION ABOUT BRANDS	
YouTube	43%
Facebook	39%
Instagram	31%
Pinterest	20%
Twitter	19%

TOP PLATFORMS TO ENGAGE WITH INFLUENCERS	
Instagram	41%
Facebook	39%
YouTube	32%
Twitter	27%
Snapchat	12%

In August, we carried out bespoke research in the U.S. and UK to dig deeper into the world of influencer marketing. We wanted to understand where the greatest potential lies. To do this, we looked at consumers' usage of different social media platforms to fulfill different functions. We analyzed which platforms they use to keep up with family and friends, which platforms they use to find out about more information about brands, and which platforms they use to engage with influencers. There are significant differences across generations, and we'll touch on this in a bit more detail.

Instagram takes the coveted spot to engage with influencers among Gen Zs (64%) and millennials (53%), while older cohorts prefer Facebook. Instagram is the perfect arena for influencer marketing. It's highly visual by design, the use of hashtags makes it easy to search for topics of interest, and Stories **enables** influencers to get creative.

YouTube comes in second place for engaging with influencers among Gen Zs (50%), whereas millennials turn to Facebook (44%). The prominence of Facebook for millennials is likely related to the fact Facebook was one of the first platforms this group used as social media emerged. **Snapchat is way ahead for Gen Z compared to other generations. For example, 31% of Gen Zs use Snapchat to engage with influencers compared to only 7% of Gen X.** Since its launch, Snapchat has largely appealed to Gen Z.

Question: Which of the following platforms do you use when you want to see what your friends or family are up to? // Which of the following platforms do you use when you're looking for more information about brands, products and services you want to purchase? // Do you follow / like / engage with influencer / celebrity accounts on any of these platforms? **Source:** GlobalWebIndex August 2019 **Base:** 2,767 U.S. and 3,568 UK internet users aged 16-64

Snapchat enables younger consumers to connect with their close friend groups and express themselves using fun features like Snapchat filters. By contrast, 56% of baby boomers say they don't use any of the mentioned platforms to follow influencers, which shows influencer marketing doesn't work for everyone, older generations in particular.

More generally, our bespoke research shows consumers in the U.S. and UK are highly engaged with influencers. Close to 70% of internet users aged 16-64 in the U.S. and around 60% in the UK follow influencers. **Importantly, there's an almost even gender split of consumers who engage with influencers, which is in line with bespoke research we ran last year. This helps to break a common misconception that it's mainly women who follow influencers online.** Influencers are often thought of as running makeup tutorials or pushing hair vitamins, but there's far more to it than this. For example, food-related content appeals to a wide group of people and isn't limited to a specific age or gender.

It's clear individual generations engage differently with social platforms depending on what they're actively looking for. Turning our attention to how consumers keep up-to-date with family and friends, we see Gen Zs primarily use Instagram (71%), with Facebook in second place (59%), followed by Snapchat (58%). Facebook takes the top place for staying in touch with family and friends for all other generations.

When it comes to finding out more information about brands, YouTube takes the top spot. This is largely driven by Gen Z and millennials, with just over half of each group turning to YouTube for more brand information.

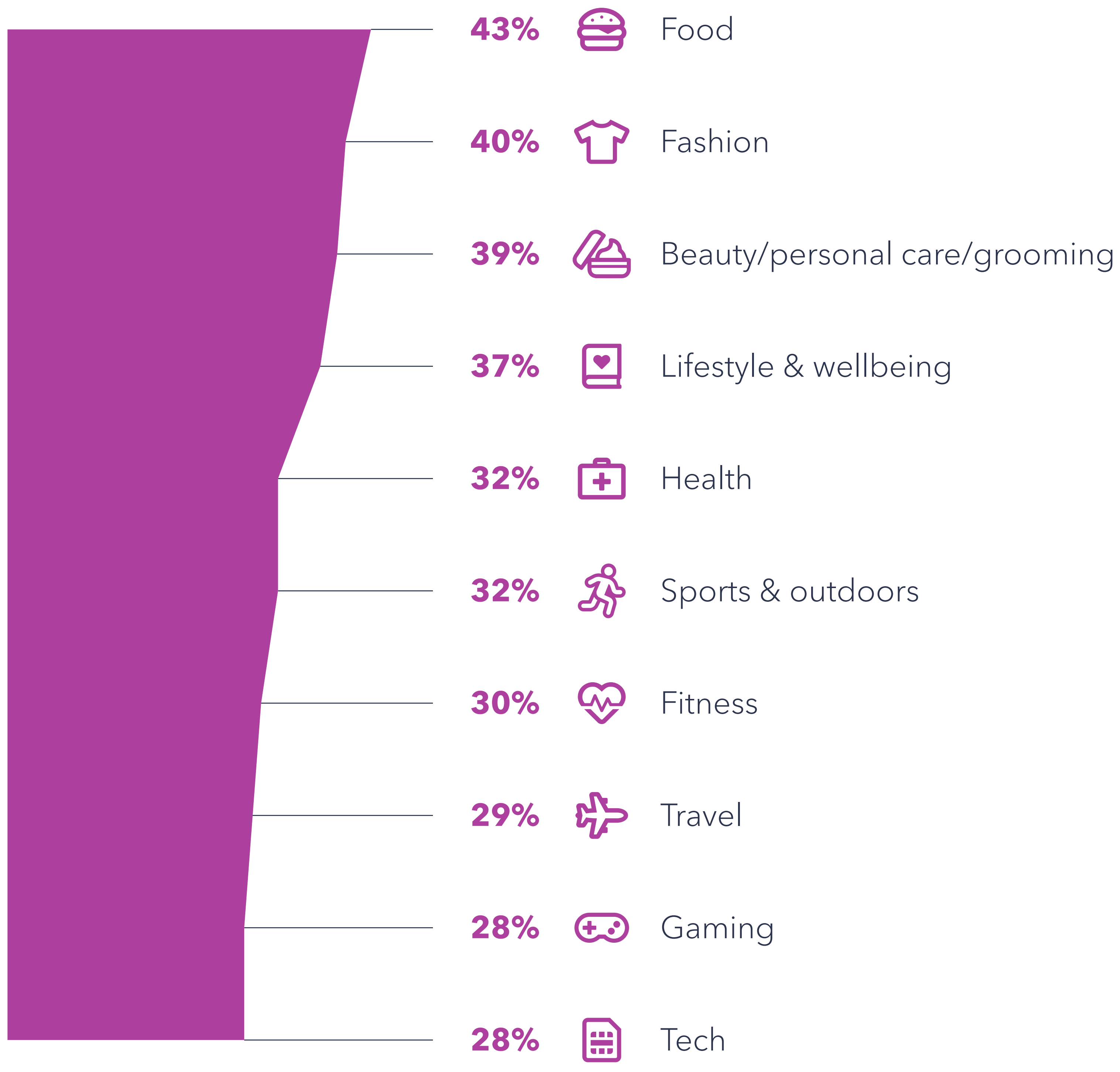
Instagram takes second place for brand research among Gen Zs (45%), while millennials look to Facebook more for research than Gen Z (45% vs. 31%). This underpins Gen Z's fundamental need for visual, engaging, video-led content that platforms like YouTube serve so well. This is also reinforced in our global research, with over half of Gen Z YouTube users saying they watched a video tutorial in the past month. Again, baby boomers are most inclined to say they don't use any of the mentioned social media networks for information, demonstrating that social networks don't serve as primary sources of product or brand research for this group. Our global research back this up, with 62% of baby boomers using search engines for product research, the highest of all generations.

Men engage with influencers just as much as women in the U.S. and UK, dispelling the misconception that it's mainly women who are interested in influencers.

What Kind of Influencer Content are Consumers Engaging With?

KEY CATEGORIES OF INFLUENCER CONTENT

% of U.S./UK Influencer Followers who follow influencers that produce these types of content



We only need to glance at Instagram to see the sheer breadth of products and topics that influencers promote. But what kind of content really makes consumers tick?

Our data shows the most popular types of content are food (43%), fashion (40%) and beauty/personal care (39%). There's some notable differences across generations, though. For example, Gen Z are engaging more with fashion content (46%) than they are with food content (37%). And millennials are more engaged with content related to health and self-help, which likely reflects their life experience and life stage.

One thing clearly stands out though – food-related content has universal appeal regardless of age and gender. Not only are consumers sharing pictures of their food and drink on social media, but they're also looking to food brands and fellow-food fanatics for inspiration. We only need to rewind to 2017 when Starbucks unveiled its **unicorn frappuccino** to the world. The drink was a limited-edition, candy floss colored drink doused with sugar, and it was a viral hit. Starbucks even openly recognized that the drink was inspired by social media. And while the reviews were largely mixed, the sheer magnitude of this drink's reach across social media made Starbucks the real winner.

Men are most interested in content related to sports/outdoors, tech and food, while for women content related to beauty, fashion, and food resonates best.

Question: Thinking about all of the celebrities and / or influencers that you follow on social media, which of the following best describes the type(s) of content they produce? **Source:** GlobalWebIndex August 2019 **Base:** 1,966 U.S. and 2,460 UK Influencer Followers aged 16-64

• TREND IN ACTION •

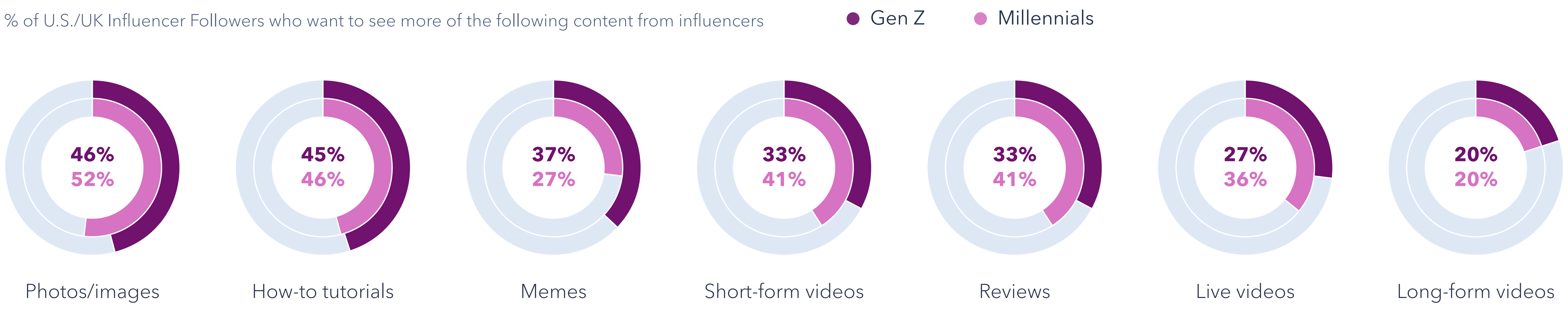
Estée Lauder Allocate Big Bucks Toward Influencer Marketing

Speaking during their fourth quarter earnings calls recently, the beauty giant revealed that **75%** of their marketing budget is now directed to social media influencers. The results, they reported, have been positive due to more focused targeting practices. The company works with a combination of micro-influencers and high-profile celebrities like Karlie Kloss. It's clear influencer marketing is proving crucial for older, more established brands like Estée Lauder to remain competitive and keep up with newer players like Glossier and Kylie Cosmetics, both of which rely primarily on social media and influencer marketing.

What Kind of Influencer Content are Consumers Engaging With?

WHAT CONTENT DO CONSUMERS WANT MORE OF?

% of U.S./UK Influencer Followers who want to see more of the following content from influencers



Over 2 in 5 millennials and around 1 in 3 Gen Z want more short-form video content from influencers.

We also asked consumers who follow influencers in the U.S. and UK what type of content they want to see more from influencers on social media. Breaking it down by Gen Z and millennials, we see photos are the most sought after content. **There's also a clear demand for video-led content in the form of how-to-tutorials, short-form videos, and live videos for both generations.**

However, there are noticeable differences across age groups and genders. Millennials show more interest in short-form videos (41%) and live videos (36%) compared to their younger counterparts. Gen Zs express a greater interest in meme content. A major reason for this is because Gen Zs see memes as a new way to communicate and express themselves in a manner that's relatable to them. Often memes target niche opinions or experiences that can help young people feel like they're understood during a time when life online can feel quite impersonal or intrusive. Males also express a greater demand for short-form videos (45%) compared to females (31%), something for influencers and brands to bear in mind when it comes to targeting key groups.

Question: Which type of content do you want to see more of from influencers / celebrities on social media? **Source:** GlobalWebIndex August 2019 **Base:** 1,121 Influencer Followers aged 16-22 in the U.S./UK and 1,778 Influencer Followers aged 23-36 in the U.S./UK

03

Influencer Marketing

The Commercial Impact of Influencer Marketing

The Role of Influencers in Brand Discovery and Product Research

Earlier in this report, we highlighted how social media has evolved to become more multi-functional in nature, and part of that is its commercial application. Consumers value convenience, so being able to do more on social media is something that's quite attractive for them. As a result, we've seen social media has increasingly become a space to discover new brands and to research products.

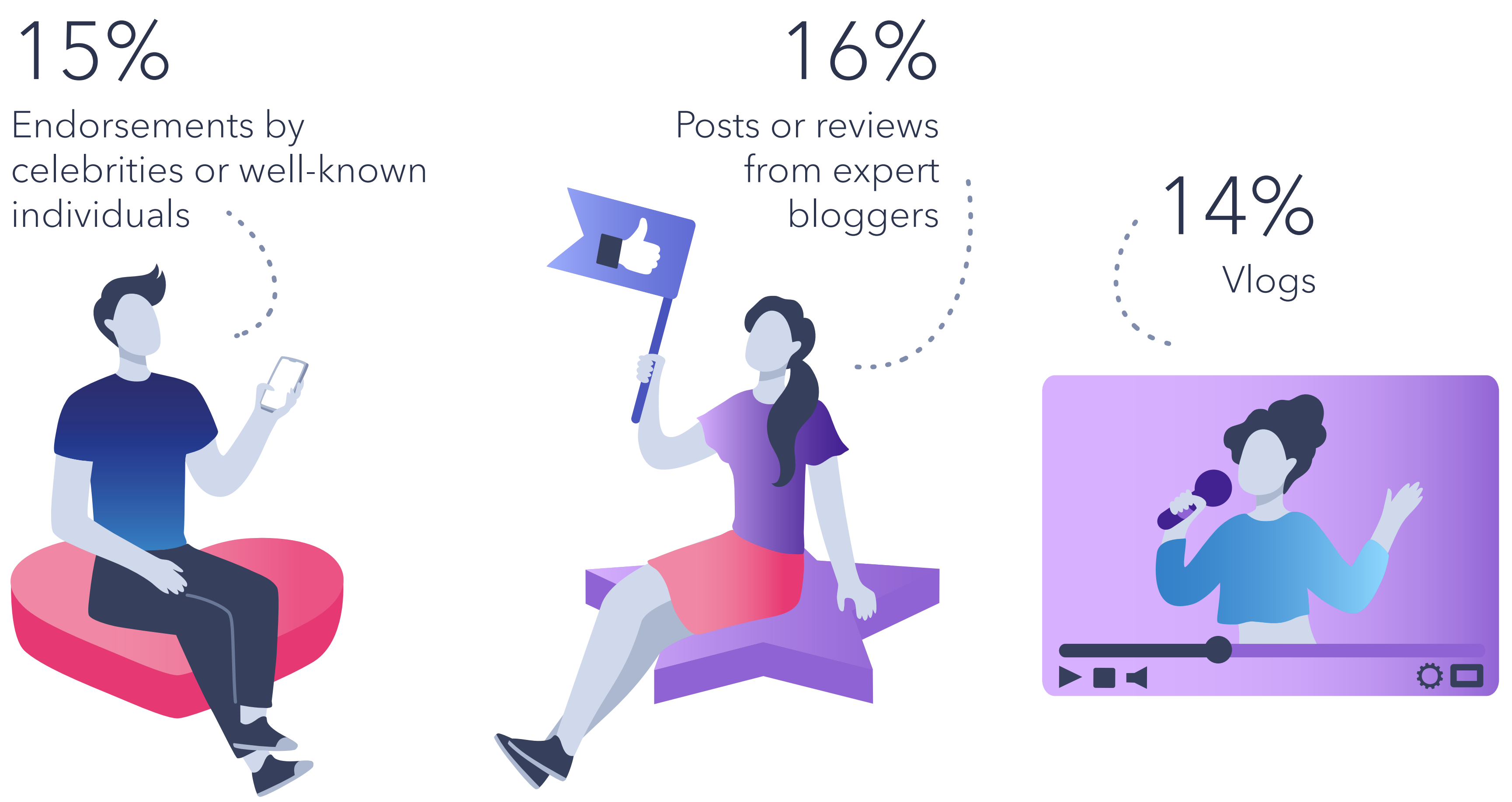
Social media is the primary channel for brand or product research among Gen Zs. Between 2015 and 2019, the number of Gen Zs relying on social media to research brands/products jumped nearly 40%. This distinguishes them from all other cohorts, as even millennials rely on search engines more frequently than social media to conduct product research. Social media's rise to the number one outlet for brand research among this group is hugely significant. It epitomizes the way our experience of commerce has transformed rapidly with the proliferation of social networks into every part of our lives.

The role of influencers is especially significant for brand discovery. Our data shows around 15% of global internet users find out about new brands via celebrity endorsements, rising to 19% among Gen Zs. It's not just well-known individuals that engage consumers though. Social media allows anyone to express their opinion and share their story, which is partly why bloggers and vloggers also have an impact. **Around 16% of global internet users find out about brands via posts or reviews from expert bloggers and 14% of them use vlogs for brand discovery.**

The importance of influencer and video-based media in the purchase journey is underscored with how these channels have grown among Gen Zs in the last number of years. **Between 2015 and 2019, video sites as a product research tool grew by around 32%, while vlogs grew by 38%.** Part of the appeal of vlogs is the more personal and interactive experience they offer users.

THE ROLE OF INFLUENCERS IN BRAND DISCOVERY

% of internet users who find out about new brands/products/services via the following



31% of global internet users say one of the main reasons they use social media is to research/find products to buy, up from 23% in 2015.

Question: How do you typically find out about new brands and products? **Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 internet users aged 16-64

The Role of Influencers in Purchase Decisions

Using our bespoke research, we explored what inspires consumers to make a purchase. It's clear that price and discounts continue to dominate purchase decision-making. But there's still a role for social media and influencers. **Around 17% of internet users in the U.S. and UK say they were inspired to make a purchase from an influencer/celebrity post on social media, increasing to 22% among Gen Zs.** Similarly, around 16% of internet users say they were inspired to make a purchase by a social media ad on Instagram Stories.

So far, social media has struggled to close the purchase loop. It appears to be the perfect place to discover brands and research products, but when it comes to completing a purchase, consumers go elsewhere.

Among those that were inspired by an influencer to make a purchase, just over 3 in 5 say they completed the purchase on an online retail site, such as Amazon. This is ahead of going straight to the retailer's website or going into a physical store to complete the purchase, which shows the dominance that online marketplaces like Amazon have. **We do see the potential of social media, however: 33% of this group say they clicked the "buy button" on social media that took them straight to the retailer's website to complete the purchase.** In the future, it's likely social media will pay a vital role in purchasing, as more sites introduce the ability for consumers to complete their purchases within the platform. Consumers value convenience, so the ability to do everything in the same platform could be a win-win and help drive brand and product engagement.

Instagram launched their feature **"Checkout with Instagram"** in March of this year, enabling consumers to seamlessly make purchases without leaving the app. As part of this launch, Instagram partnered with around 20 brands, including Adidas, Kylie Cosmetics and Warby Parker. More platforms, like TikTok, are starting to get in on the action, as well.

THE ROLE OF INFLUENCERS IN INSPIRING PURCHASES

% of U.S./UK internet users who say the following inspired them to make a purchase in the past month

17% of internet users in the U.S. and UK were inspired to make a purchase from an influencer/celebrity post on social media, increasing to 22% among Gen Zs.

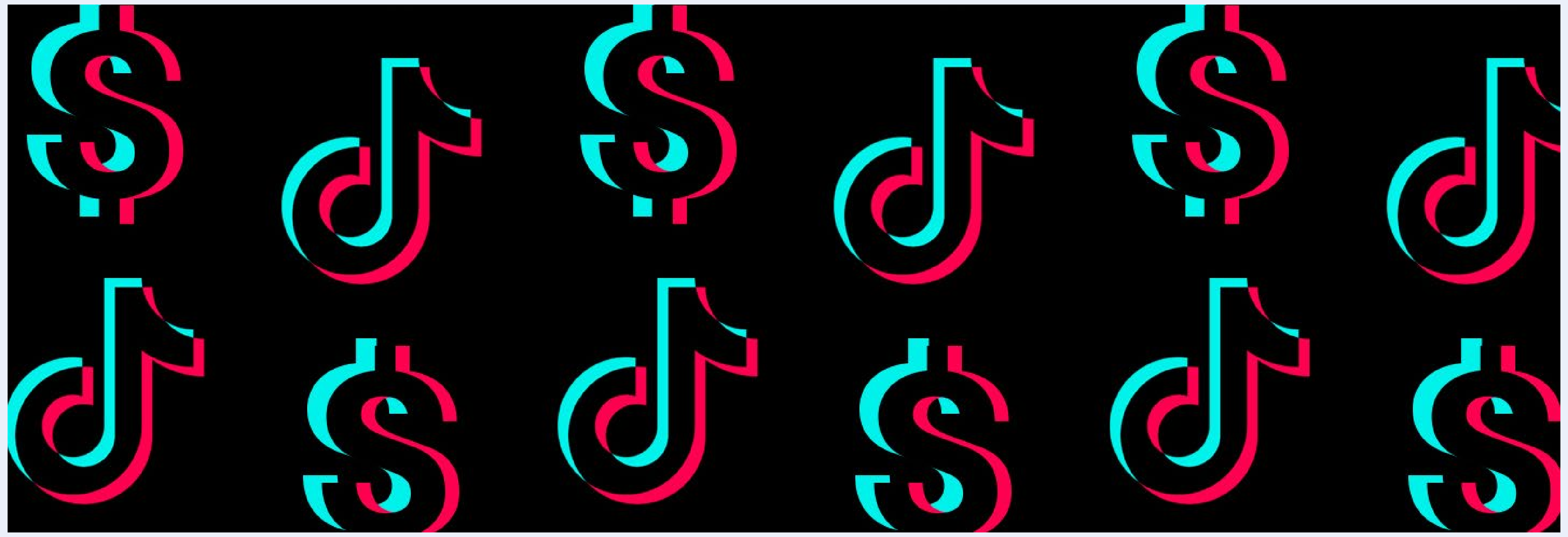
Those who were inspired by an influencer/celebrity post on social media:

22%	Gen Z
20%	Millennials
16%	Gen X
6%	Baby Boomers

Question: Which of the following have inspired you to make a purchase in the past month? **Source:** GlobalWebIndex August 2019 **Base:** 2,767 U.S. and 3,568 UK internet users aged 16-64

• TREND IN ACTION •

TikTok Wants Consumers to Shop 'Til They Drop – Within the App



TikTok, the short-form video platform loved by teenagers, has recently **launched** a new feature that allows users to shop for products linked with a sponsored "Hashtag Challenge," without leaving the app. TikTok sponsored challenges are marketing campaigns where users post videos of themselves using the products to the platform – like showing off their favorite outfits from **Uniqlo**. The new e-commerce feature called "Hashtag Challenge Plus" adds a shoppable element to the hashtag.

Grocery chain Kroger was reportedly the first company to **test the new feature**. In line with back-to-school season, the company is encouraging college kids to post videos of their dorm room transformations using the hashtag #TransformUrDorm. Users can also shop for Kroger products within a dedicated brand page in the app.

04

Influencer Marketing

Emphasizing Trust and Authenticity

What Do Consumers *Really* Want From Influencers?

We can't talk about influencer marketing without addressing the elephant in the room – influencer fraud.

Influencer fraud is essentially influencers who either buy followers or use bots to artificially inflate engagement with their account, often to get a higher brand fee.

It's problematic for several reasons. First of all, it misleads consumers and creates trust issues. Are they being sold a dud? How do they know if it's a genuine recommendation? Secondly, it costs companies serious money. **New York-based cybersecurity company CHEQ found that the direct global economic costs of fake influencers is around $1.3 billion annually.** Last month, it was revealed the cast of the popular TV show Love Island boosted their Instagram influencer status by gaining numerous fake followers – more than half of the accounts following this year's contestants were found to be fake.

Advertising bodies have taken the issue very seriously and are clamping down on fake influencers. The Advertising Standards Authority (ASA) in the UK and the Federal Trade Commission (FTC) in the U.S. have enforced strict ad guidelines to help regulate the process and create greater transparency. For example, influencers are required to state if they are being paid to promote a product. Brands are also taking a stand too. Last year, Unilever's Chief Marketing Officer, Keith Weed, made a plea to the **ad industry** and social media platforms to take "urgent action now to rebuild trust before it's gone forever". The company publicly refused to be associated with fraudulent influencers and are working with social media platforms to stamp out fraud and increase transparency.

In our bespoke research, we asked Influencer Followers: what are the most important qualities an influencer should have? **The results show consumers want influencers to be trustworthy (48%) above all else. A further 29% of consumers want influencers to be transparent about sponsorship.** This highlights that trust, transparency, and authenticity are paramount when it comes to the influencer-consumer relationship. Consumers want full disclosure about what influencers are promoting, and this means being upfront at the beginning of a post, not burying it deep within the caption. They also want influencers to be credible, which means only promoting products they really use and know about.

Successful influencer marketing is built off of being honest, personable, and having a good understanding of your audience. The ability for influencers to tell a story and engage audiences in a genuine way is also important. For example, humor can be a great way to engage consumers. And around 2 in 5 Influencer Followers say being entertaining is a desirable quality for influencers to have, jumping up to around half of Gen Zs. This overtakes being informative for this group, which reinforces their fundamental need for entertaining content.

Influencer Followers care the least about the number of likes/comments influencers receive on posts, as well as the number of followers they have. This signifies consumers care about more important things than superficial qualities, such as the perceived popularity of an account, which brings us onto our final section.

Influencer Followers in the U.S. and the UK say trust is the most desirable quality for influencers to have.

WHAT CONSUMERS WANT FROM INFLUENCERS

% of U.S./UK Influencer Followers who say the following qualities are the most important for an influencer to have

TOP 5 DESIRABLE QUALITIES	
They're trustworthy	48%
They're informative	46%
They're funny/entertaining	40%
That I can relate to them and their content	37%
That they only promote products they're knowledgeable about	33%

BOTTOM 5 DESIRABLE QUALITIES	
The number of likes/comments they receive on their posts	11%
The number of followers they have	11%
That I aspire to be like them	15%
That I find out about new brands and products through them	23%
That they're experts in their field	26%

Question: Which of the following qualities are the most important for an "influencer" to have? **Source:** GlobalWebIndex August 2019 **Base:** 1,966 U.S. and 2,460 UK Influencer Followers aged 16-64

• TREND IN ACTION •

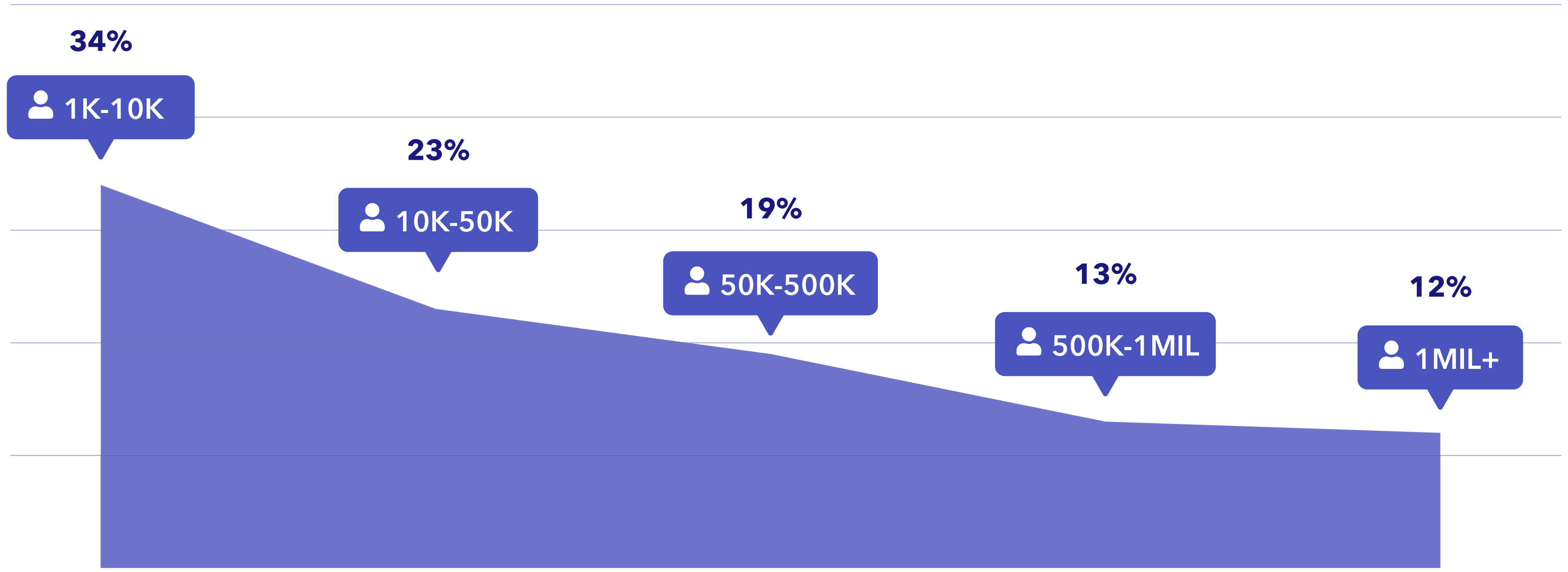
Ogilvy and Takumi Partner to Tackle Influencer Fraud

Advertising company Ogilvy UK and Instagram influencer marketing platform Takumi have **partnered** together to expand Ogilvy's existing InfluenceO tool with Takumi's offering of connecting brands with suitable influencers. InfluenceO currently houses over a billion influencers across 60,000 categories. The tool not only enables the right pairing of advertisers and influencers, but it also vets them and offers real-time measurement tools to help brands avoid issues like influencer fraud. The deal will also allow brands that work with Ogilvy to scale influencer campaigns globally and run tailored campaigns in local markets.

Bigger is not always better

THE CREDIBILITY OF BIG FOLLOWER COUNTS

% of U.S./UK Influencer Followers who say the below follower counts are most credible



56% of Influencer Followers in the U.S. and UK think influencers with up to 50,000 followers are the most credible.

Traditionally, many brands have focused on the number of followers an influencer has as a way to demonstrate a positive ROI. As a result, influencers feel the pressure to show their reach to a large audience – and some inflate their follower count using fake followers.

But our data shows more followers doesn't equate to greater consumer trust. **Influencer Followers in the U.S. and UK trust smaller influencers the most. 34% of consumers say they think influencers with a follower count between 1,000-10,000 are the most credible.** Just 12% of consumers think influencers with over a million followers are trustworthy. These figures remained pretty consistent across users of different platforms like Facebook, Instagram, YouTube and Snapchat. Additionally, when we asked Influencer Followers what they trust least about influencers, 30% say they don't trust the credibility of likes/comments on their content.

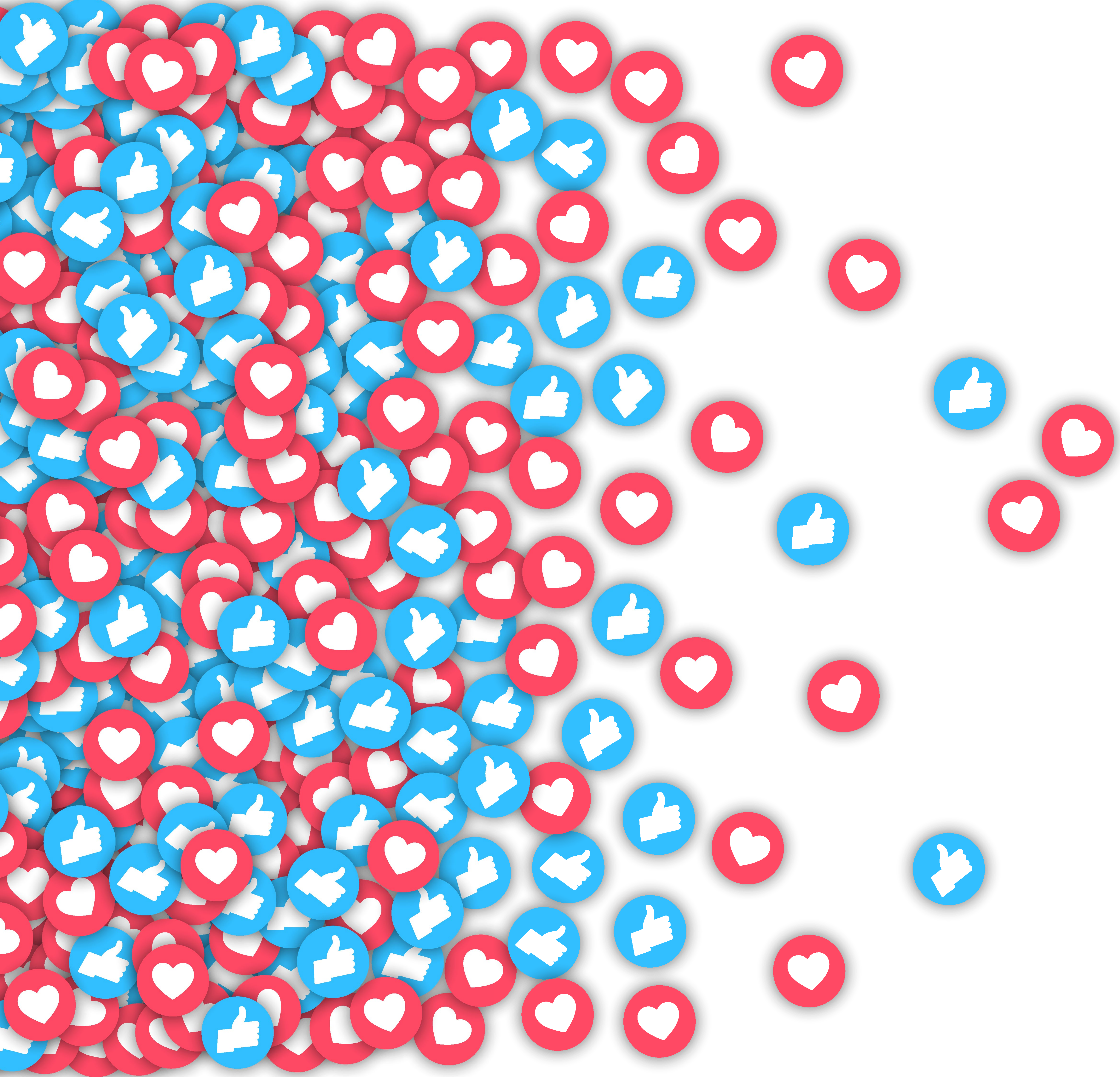
So it's not the high-profile celebrity that's a hit with consumers; rather, it's the smaller micro influencer, or even nano influencer (everyday people), that shows the most potential. Essentially, **anyone who has built an online community around something they care about can be a good fit.** And often it's these smaller influencers that have a super loyal, dedicated fanbase. Adidas is one example of a brand that's leveraging micro-influencers.

Question: Thinking about influencers and celebrities on social media, which of these do you think you can best relate to / are most credible to you? **Source:** GlobalWebIndex August 2019 **Base:** 1,966 U.S. and 2,460 UK Influencer Followers aged 16-64

• TREND IN ACTION •

Adidas Focus on Small Influencers with the Tango Squad FC

Adidas are taking us on a journey using micro influencers. The brand's **latest initiative** was The Tango Squad FC show, which followed some of the best street footballers and chartered their journey as the first "social media football team" over two seasons. The brand used Instagram's IGTV to highlight behind-the-scenes content, and episodes were played across YouTube, Facebook, Instagram and Twitter, racking up 41 million views across the platforms. Adidas have chosen to abandon one-off engagement in favor of a longer-term journey with these small, aspirational influencers. By doing this, the brand helps consumers to build a deeper connection with these influencers.



Taking Action and Looking Forward

Instagram is taking a bold measure to move away from "vanity metrics" by hiding the number of likes on posts. The company is currently **testing** this feature in several markets worldwide in an effort to make the environment less competitive. The change will potentially help brands measure their ROI more effectively by measuring online or in-store sales driven by influencer posts rather than likes. Experts also believe it will help influencers to focus less on the number of likes and more on the quality of their content. Many believe the changes will incentivize brands to put paid media support behind their influencers' posts, and will rely more heavily on Instagram Stories.

We know influencer marketing shows no signs of slowing down, but the bottom line is brands need to carefully consider the type of influencer they choose to partner with. They need to focus on influencer fit rather than the number of followers an influencer has. For brands to succeed in this space, it's vital they build genuine and honest relationships with consumers. Using influencers can offer brands the opportunity to create deeper, more personal connections with their key audiences – so it's something worth getting right.

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia, and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.
This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this **document**.

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

Unless otherwise stated, this report draws insights from GlobalWebIndex's Q2 2019 wave of research across 45 countries, with a global sample of 139,658 respondents.

Argentina	1,565
Australia	4,056
Austria	1,291
Belgium	1,282
Brazil	2,355
Canada	2,301
China	15,215
Colombia	1,330
Denmark	1,257
Egypt	1,788
France	5,152
Germany	5,176
Ghana	847
Hong Kong	1,813
India	7,594
Indonesia	1,855
Ireland	1,269
Italy	5,363
Japan	1,877
Kenya	958
Malaysia	1,533
Mexico	2,619
Morocco	947
Netherlands	1,311
New Zealand	1,298
Nigeria	958
Philippines	1,627
Poland	1,875
Portugal	1,288
Romania	1,309
Russia	2,273
Saudi Arabia	1,537
Singapore	2,714
South Africa	1,548
South Korea	1,278
Spain	5,114
Sweden	1,314
Switzerland	1,291
Taiwan	1,783
Thailand	1,570
Turkey	1,536
UAE	1,804
UK	10,146
USA	25,037
Vietnam	1,604

Notes on Methodology

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

INTERNET PENETRATION RATES

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

Argentina	78%	Netherlands	93%
Australia	88%	New Zealand	93%
Austria	88%	Nigeria	36%
Belgium	89%	Philippines	64%
Brazil	71%	Poland	79%
Canada	94%	Portugal	78%
China	59%	Romania	72%
Colombia	66%	Russia	80%
Denmark	97%	Saudi Arabia	83%
Egypt	54%	Singapore	85%
France	85%	South Africa	62%
Germany	88%	South Korea	95%
Ghana	48%	Spain	87%
Hong Kong	91%	Sweden	96%
India	42%	Switzerland	96%
Indonesia	39%	Taiwan	83%
Ireland	87%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	USA	80%
Mexico	69%	Vietnam	55%
Morocco	69%		

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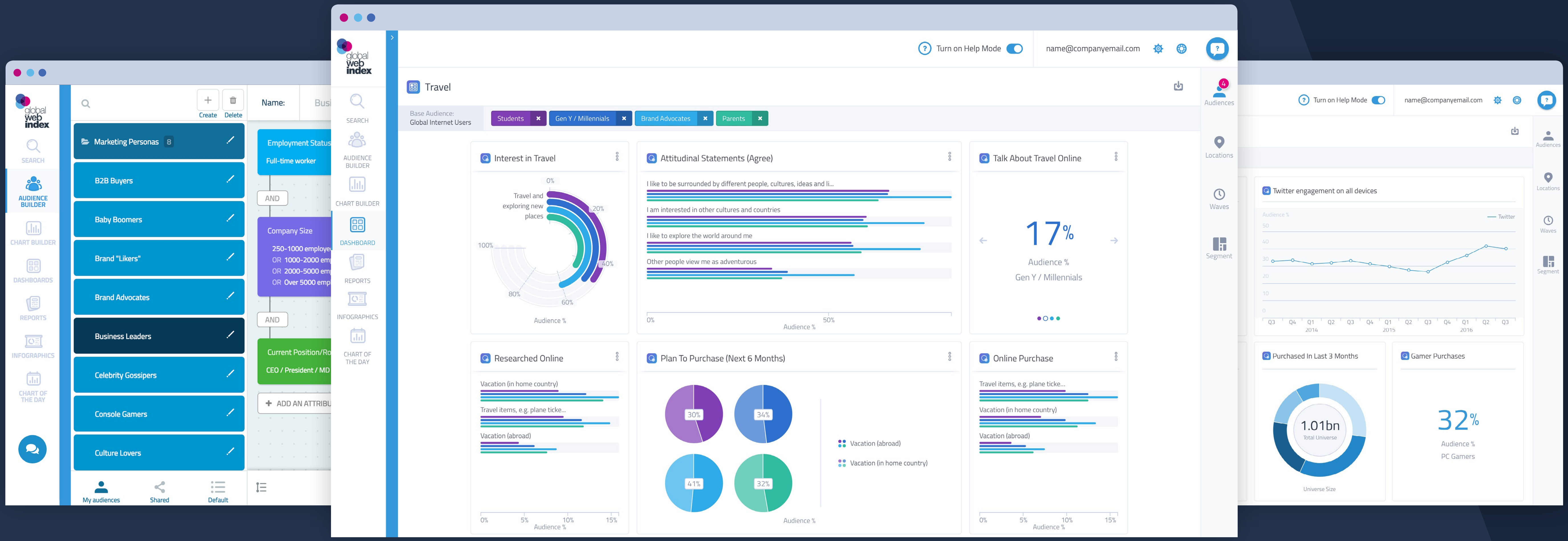

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