

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Influencers can bring authenticity to brand communications. While consumers who follow influencers may know when they are being sold to, they still value the entertaining and honest depictions of real life that are projected online. Influencer marketing will continue to evolve as user-generated content becomes more and more important to the digital media landscape."

- John Poelking, Leisure & Media Analyst

This report looks at the following areas:

- The dominance of celebrity culture
- Relationship between influencer and follower
- The impact of influencers on the purchase process
- Trust in influencer marketing
- Topics searched on different platforms

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Overview

Figure 1: Profile of influencer followers, December 2018

The dominance of celebrity culture

Pop culture drives influencer content

Key takeaway

Figure 2: Types of accounts followed, December 2018

Relationship between influencer and follower

Developing a kinship with influencers

Key takeaway

Figure 3: Influencer connection and celebrity status, December 2018

The impact of influencers on the purchase process

Social media great for building product awareness

Key takeaway

Figure 4: Purchasing on social media, December 2018

Trust in influencer marketing

Users know when they are being sold to

Key takeaway

Figure 5: Trust in influencers, December 2018

Topics searched on different platforms

Areas of interest vary among social sites

Key takeaway

Figure 6: Correspondence analysis – Symmetrical map – Reasons for visiting social media sites, December 2018

What it means

Influencer Landscape - What You Need to Know

Influencer content set to continue upward trajectory

Celebrities dominate the discussion

The Influencer Marketing Landscape

FTC regulates sponsored social posts

Sponsored post volume on the rise

Figure 7: Sponsored post volume, January 2017-December 2018

Influencers earning top dollar for posts

Consumers looking to corporations to share values

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Media consumption dominates daily activities

Heavy investments in digital advertising continue

Types of Accounts Followed

Half of social media users follow accounts they don't personally know

Figure 8: Profile of influencer followers, December 2018

Social amplifies celebrity status

Figure 9: Types of accounts followed, December 2018

Women follow accounts with online clout

Figure 10: Types of accounts followed - Select items, by gender, December 2018

Younger consumers looking for new voices

Figure 11: Types of accounts followed - Select items, by age, December 2018

Black, Hispanic users seek out entertainers

Figure 12: Types of accounts followed, by race and Hispanic origin, December 2018

Key Trends - What You Need to Know

Creating relationships between consumer and viewer

Some cracks showing in new communication

New influencers on new platforms

What's In?

Going for small and smaller

Who's doing this well?

Figure 13: @thesorrygirls "Google Pixel" post, November 2017

Emphasizing authenticity

Who's doing this well?

Figure 14: @jayversace "Reebok" post, October 2018

Partnering equity with exposure

Who's doing this well?

Figure 15: @drinkbabe "Christmas" post, December 2018

Politics on the platform

Who's doing this well?

Figure 16: @ocasio2018 "Christmas" post, December 2018

What's Out?

Strategizing based on follower count

Getting influencers to follow through

Dangerous products receive backlash

Figure 17: @jameelajamil Twitter post, November 2018

"Sponcons" and the art of faking influence

What's Next?

Using avatars as influencers

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Products to make anyone an influencer

Finding the next platform

Multi-channel networks for more integrated exposure

Getting younger and more creative with creators

The Consumer - What You Need to Know

Entertainment more important than education on social media

Bring on the fun

Difficult to get a non-follower

Different platforms attract unique interests

Account discovery tends to be organic

Learning from products via social media

High expectations for influencer content

Consumer segmentation highlights opportunities

Categories Followed

Key opportunity

Category diversity shows preference for entertainment

Fun accounts are key to influencer content

Educational accounts have their audience

Figure 18: How To Cake It welcome video, January 2019

Life advice low in viewers, high in engagement

Figure 19: Categories followed, December 2018

Gender gap reveals distinct differences

Figure 20: Categories followed, by gender, December 2018

Young adults want to be artistic

Figure 21: Categories followed – Select items, by age, December 2018

Black, Hispanic users get inspired

Figure 22: Categories followed, by race and Hispanic origin, December 2018

Qualities of a Good Influencer

Key opportunity

Fun content beats practical...

Figure 23: Qualities of a good influencer, December 2018

...except for brand posts

Figure 24: Reasons to follow brands on social media, December 2018

Younger users looking for a break from the norm

Figure 25: Qualities of a good influencer – Select items, by age, December 2018

Parents more likely to seek validation

Figure 26: Qualities of a good influencer – Select items, by parental status, December 2018

Reasons to Not Follow Influencers

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key opportunity

Many don't see the value in influencer accounts

Figure 27: Reasons to not follow influencers, December 2018

Older users need value demonstrated

Figure 28: Reasons to not follow influencers - Select items, by age, December 2018

Platforms to Use and Discover

Key opportunity

Overview

Facebook

Instagram

YouTube

Pinterest

Snapchat

Figure 29: Correspondence analysis – Symmetrical map – Reasons for visiting social media sites, December 2018

Figure 30: Reasons for visiting social media platforms, by social media platform, December 2018

Tools to Discover New Accounts

Key opportunity

Sharing drives new account discovery

Figure 31: Tools to discover new accounts, December 2018

Younger users more actively seeking

Figure 32: Tools to discover new accounts – Select items, by age December 2018

Influencers and Product Promotions

Key opportunity

Plenty of opportunities to learn and buy on social media

Figure 33: Purchasing on social media, December 2018

Little trust that influencer promotion is genuine

Figure 34: Trust in influencers, December 2018

Product associations can have consequences for influencers

Figure 35: Unfollowing accounts that promote products, December 2018

Attitudes toward Influencers

Key opportunity

The role of influencers in media

Figure 36: Influencer connection and celebrity status, December 2018

Learning from social media (over and over again)

Figure 37: Learning from social media, December 2018

Follower count doesn't affect perceptions of influencers

Figure 38: Attitudes toward microinfluencers, December 2018

Consumer Segmentation

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Factors

Figure 39: Consumer segmentation, December 2018

Fame Followers (43%)

Demographics

Characteristics

Opportunities

Figure 40: Consumer segmentation - Fame Followers, by demographics, December 2018

Connected Confidantes (30%)

Demographics

Characteristics

Opportunities

Figure 41: Consumer segmentation - Connected Confidantes, by demographics, December 2018

Mellow Monitors (27%)

Demographics

Characteristics

Opportunities

Figure 42: Consumer segmentation - Mellow Monitors, by demographics, December 2018

Appendix - Data Sources and Abbreviations

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix - Correspondence Analysis

Methodology

Figure 43: Correspondence analysis - Principal map - Reasons for visiting social media sites, December 2018

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com