“Brands increasingly have to look beyond surface level metrics, such as follower numbers, when deciding which social media influencers to partner with. Influencer authenticity, trust and engagement levels play a key role in actually impacting purchasing behaviour, often making micro influencers more valuable than those with larger followings.”

– Rebecca McGrath, Senior Media Analyst

This report looks at the following areas:

- Brands should look beyond follower numbers
- Platforms expand monetisation options to keep creators happy
- Influencers demand more monetisation options
- Direct fan payments offer another way for influencers to make money

Social media influencers – both traditional celebrities and social media personalities – have become a very important advertising option for brands. Mintel’s research shows that 40% of people who have used social media in the last three months follow or frequently view posts from a social media personality, even more than those viewing posts from traditional celebrities (35%). Among Generation Z, a massive 83% of social media users are following/frequently viewing social media personalities, highlighting their importance for targeting this demographic.
Influencers - UK - January 2020

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The Market
ASA cracks down on influencer labelling
YouTube implements stricter bans on discriminatory content
Platforms and regulators try to crack down on fake followers

Key Players
PewDiePie crosses the 100 million barrier
Top TikTok influencer has 35 million followers
Politicians on Twitter leave the social network making complex censorship choices
Twitch struggles to keep top talent
Instagram begins hiding public like counts
YouTube offers more monetisation options for creators concerned about the unreliability of advertising revenue
Instagram’s new branded content ads expand the reach of influencers

The Consumer
Facebook still most-used social media platform
Figure 1: Use of social media platforms, November 2019
Instagram and Twitter strong performers overall
Figure 2: Who people follow on social media platforms, November 2019
TV/film is most popular personality topic
Figure 3: Topics covered by social media personalities, November 2019
The search bar is primary method of discovering personalities
Figure 4: Methods of discovering social media personalities, November 2019
Nearly one in five have made a purchase in response to an influencer’s post
Figure 5: Behaviour in response to influencer posts, November 2019

Over half use discount codes
Figure 6: Purchasing and influencer posts, November 2019
Less than half of social media users notice sponsored content
Figure 7: Sponsored social media content, November 2019
Social media personalities can boost brand reputation
Figure 8: Attitudes towards social media influencers, November 2019

What we think

Issues and Insights

Brands should look beyond follower numbers
The facts
Platforms expand monetisation options to keep creators happy

The implications
ASA cracks down on influencer labelling
YouTube implements stricter bans on discriminatory content
Platforms and regulators try to crack down on fake followers
High-profile stories bring the inauthenticity of the influencer world to the forefront
Virtual influencers offer another method of challenging inauthenticity
Influencer mental health raises questions about their need for protection

The Market – What You Need to Know

Influencers inspire a range of purchases
Figure 9: Purchases/activities prompted by influencers, April 2019

ASA cracks down on influencer labelling
YouTube implements stricter bans on discriminatory content
Platforms and regulators try to crack down on fake followers
High-profile stories bring the inauthenticity of the influencer world to the forefront
Fyre Fest documentaries outline the easy manipulation of influencers
The story of Caroline Calloway highlights influencer manipulation
Virtual influencers offer another method of challenging inauthenticity
Influencer mental health raises questions about their need for protection

Key Players – What You Need to Know

Celebrities dominate on Instagram
PewDiePie crosses the 100 million barrier
Top TikTok influencer has 35 million followers
Twitch struggles to keep top talent
Instagram begins hiding public like counts
YouTube offers more monetisation options for creators concerned about the unreliability of advertising revenue
Instagram’s new Branded Content Ads expand the reach of influencers
Instagram checkout launches in the US
Snapchat invests in top Lens creators

Market Share

Celebrities dominate on Instagram
Figure 10: Top 10 influencers on Instagram, 11 December 2019

Instagram influencers make thousands per post

BUY THIS REPORT NOW
Politicians on Twitter leave it with complex censorship choices to make

Traditional celebrities unlikely to find much success with their own YouTube channels

PewDiePie crosses the 100 million barrier

Justin Bieber still YouTube’s number one musician

Top TikTok influencer has 35 million followers

Twitch struggles to keep top talent

Instagram begins hiding public like counts

Influencers have concerns about the change

YouTube offers more monetisation options for creators concerned about the unreliability of advertising revenue

YouTube’s demonetisation and copyright policies have caused creator backlash

Instagram’s new branded content ads expand the reach of influencers

Ecommerce becomes major focus of Instagram

Platforms offer more tools to creators

Snapchat invests in top Lens creators

Twitch introduces new broadcasting tools

Facebook still most-used social media platform

Half of Instagram users follow a social media personality

TV/film is most popular personality topic

The search bar is primary method of discovering personalities

Nearly one in five have made a purchase in response to an influencer’s post

Over half use discount codes

Less than half of social media users notice sponsored content

Social media personalities can boost brand reputation

Facebook still most-used social media platform

Instagram Checkout launches in the US

Launch Activity and Innovation

Launch Activity and Innovation

Influencer - UK - January 2020

Influencers have concerns about the change

YouTube offers more monetisation options for creators concerned about the unreliability of advertising revenue

Instagram’s new branded content ads expand the reach of influencers

Ecommerce becomes major focus of Instagram

Platforms offer more tools to creators

Snapchat invests in top Lens creators

Twitch introduces new broadcasting tools

Facebook still most-used social media platform

Half of Instagram users follow a social media personality

TV/film is most popular personality topic

The search bar is primary method of discovering personalities

Nearly one in five have made a purchase in response to an influencer’s post

Over half use discount codes

Less than half of social media users notice sponsored content

Social media personalities can boost brand reputation

Facebook still most-used social media platform

If you're interested in more insights or other Mintel reports, you can visit our website or contact us as follows:

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
Facebook is trying to draw in more creators
  Figure 18: Use of social media platforms, November 2019
  Figure 19: Repertoire of social media platforms used, by age, November 2019

TikTok is becoming a major player but amid growing controversy
  Figure 20: Use of social media platforms, by age, November 2019

Who Users Follow on Social Media
  Half of Instagram users follow a social media personality
    Figure 21: Who people follow on social media platforms, November 2019
    Figure 22: Who 16-24 year olds follow on social media networks, November 2019

Twitch battles to keep important personalities
More than eight in 10 from Gen Z follow a social media personality
  Figure 23: Who people follow on social media platforms (NET), November 2019
  Figure 24: Who people follow on social media platforms (NET), by generation, November 2019

Topics of Social Media Personalities
TV/film is most popular personality topic
TV/film reaction videos are an area YouTube is not fully capitalising upon
  Figure 25: Topics covered by social media personalities, November 2019
  Figure 26: Repertoire of topics covered by social media personalities, November 2019

Beauty/fashion influencers face more scrutiny over authenticity
Social networks step up efforts to protect impressionable young women
Topics of interest are split along traditional gender lines
  Figure 27: Topics covered by social media personalities, by gender, November 2019

Discovery of Social Media Personalities
Search bar is primary method of discovering personalities
Topics has to take into account a user’s viewpoint on issues
  Figure 28: Methods of discovering social media personalities, November 2019

Understanding the algorithm
Friends and family recommendations important for discovery

Behaviour and Social Media Influencers
Nearly one in five have made a purchase in response to an influencer’s post
  Figure 29: Behaviour in response to influencer posts, November 2019
  Figure 30: Behaviour in response to influencer posts, by gender, November 2019

People’s attachment to influencers demonstrated by their willingness to send them money
Platforms should take a limited cut from fan sponsorships
Over half use discount codes
  Figure 31: Purchasing and influencer posts, November 2019

Less than half of social media users notice sponsored content
Ensuring branded content is palatable

Social media personalities can boost brand reputation

Traditional celebrities do not have much more trust than social media personalities

Follower numbers not everything when it comes to influencer trust

Over-promotion limits trust

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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