$5BN Market & Growing

With the rise of content creators, influencer marketing spend is projected to increase significantly in the coming years.

Global Influencer Market Size

Source: MAGNA & Reprise "The Social Report" 2022
With a $6 billion stake in the coming year, what should brands do to ensure influencer marketing success?
Our Goals

**GOAL 1**
To uncover user perceptions and preferences about influencer content

**GOAL 2**
To identify best practices for influencer marketing
Our Scope

Methodology

Interviewed weekly users of social media platforms and/or Snapchat (16 - 49 age group) from a representative online panel.

- The methodology included a survey to gauge current perceptions of influencer content and receptiveness to brand-sponsored influencer content
- Additionally, gathered feedback on influencer content across various platforms through creative feedback

Research Conducted In 5 Countries:

Total (n) = 5,214

- 1,179 United States (n)
- 1,005 Saudi Arabia (n)
- 1,003 United Kingdom (n)
- 1,022 Australia (n)
- 1,005 France (n)
The Creator Effect
Influencers are a natural asset for brands

Purpose For Social Media Usage - % Net Score Of All Platforms

- To follow influencers or content creators they like

61%

Engagement with products is a significant driver of viewership even for organic content

Survey Q: For what purposes do you use the following social media platform(s)?

Survey Q: What type of influencer content do you typically watch?

All markets | n= 5,214

Types Of Influencer Content People Typically Watch - % Selected

COOKING RECIPES 51%

TUTORIALS 42%

LIFESTYLE CONTENT 42%

PRODUCT REVIEWS 41%
Across all markets, people seek brand info from influencers

Product Related Influencer Content People Watch - Indexed To Average Of All Categories In Each Country

- Tutorials
- Product Reviews
- Restaurant Reviews

United States
- Tutorials: 122
- Product Reviews: 123
- Restaurant Reviews: 118

United Kingdom
- Tutorials: 118
- Product Reviews: 113
- Restaurant Reviews: 141

France
- Tutorials: 141
- Product Reviews: 141
- Restaurant Reviews: 115

Saudi Arabia*
- Tutorials: 115
- Product Reviews: 116
- Restaurant Reviews: 111

Australia
- Tutorials: 111
- Product Reviews: 123
- Restaurant Reviews: 116

*In SA, restaurant reviews over indexed, providing brands with an additional avenue for engaging with the users

USA n= 1,179; UK n=1,003; FR n=1,005; SA n=1,005; AU n=1,022

Survey Q: What type of influencer content do you typically watch?
In fact, the vast majority are open and receptive to brands sponsoring influencer content

Receptivity To Brand Sponsored Influencer Content - % Very Or Somewhat Open

87% Are receptive

Survey Q: How open are you to seeing sponsored content from influencers?

Brand-sponsored content: Sponsored content is where influencers promote or endorse products or brands in exchange for compensation.
Receptivity to brand sponsored influencer content is consistent across all generations

Receptivity To Brand Sponsored Influencer Content - % Very Or Somewhat Open

All markets, Gen Z n= 1,149; Millennials n=3,070; Gen X n=995

Survey Q: How open are you to seeing sponsored content from influencers?

Brand-sponsored content: Sponsored content is where influencers promote or endorse products or brands in exchange for compensation.
The Influencer Marketing Playbook
RULE #01

Take action to build trust

MISTAKES & LESSONS LEARNED

REALISTIC LIVES

EVIDENCE & FACTS
There’s opportunity to improve trust in influencer content

Perception Of Influencer Content
- % Selected

Is influencer content trustworthy?

NO: 16%
YES: 28%
SOMEWHAT: 55%

Survey Q: In general, how do you feel about content posted by influencers on the following platforms?

All markets | Instagram n= 4,185; Snapchat n= 2,848; TikTok n= 3,556; Facebook n= 3,801

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... especially in high-stakes sectors such as finance

When brands in high stakes categories are working with influencers, consider a transparent collaboration with brand

Trusted Source(s) For Researching Products In These Categories
- % Selected

**Finance**
- 18% The influencer more
- 42% The brand more
- 21% Both equally
- 19% Neither

**Apparel**
- 25% The influencer more
- 33% The brand more
- 28% Both equally
- 14% Neither

**Skincare**
- 28% The influencer more
- 31% The brand more
- 27% Both equally
- 14% Neither
Work these elements into your influencer content strategy to build trust

Top Three Drivers Of Influencer Trust...

- **60%** Sharing mistakes and lessons learned
- **58%** Showing evidence and facts
- **57%** Portraying a realistic life

Survey Q: To what extent would each of the following help build your trust in an influencer?
Transparency is a must
People expect transparency with brand sponsored influencer content

Importance Of Brand Sponsorship Disclosure - % Very Or Somewhat Important

89%
Say it's important that creators make it known their content is sponsored by a brand

[doesn't matter]
Brands should practice transparency based on regional preferences

Preferred Methods For Learning About Brand Sponsorships - % Selected

In their voiceover
- US: 28%
- UK: 24%
- FR: 18%
- SA: 22%
- AU: 26%

Simply with a hashtag
- US: 22%
- UK: 26%
- FR: 23%
- SA: 30%
- AU: 25%

A sponsorship watermark
- US: 21%
- UK: 26%
- FR: 19%
- SA: 24%
- AU: 24%

In the caption
- US: 19%
- UK: 17%
- FR: 28%
- SA: 20%
- AU: 19%

Survey Q: In what ways would you most prefer to find out about the brand sponsorship from an influencer?
Both, influencers & brands, are rewarded for transparency with increased trust & engagement

Impact Of Transparency About Brand-sponsored Influencer Content
- % Very Or Somewhat Likely

If an influencer is upfront about a brand sponsored post, I would trust the _______ more.

Influencer

[285K FOLLOWERS | 728 POSTS]

Influencer Trust Level

- +

If an influencer is upfront about a brand sponsored post, I would be more likely to engage with the _______.

Brand

[63%]

Brand Engagement Level

- +

Survey Q: If an influencer is upfront about a brand sponsored post, how would it affect your opinion of them?

All markets | n= 5,214

Survey Q: If an influencer is upfront about a brand sponsored post, how would it affect your opinion of them?
Choose honesty, authenticity, & knowledge.
Brands should seek honest, authentic, & knowledgeable influencers to boost engagement

In fact, honesty, authenticity, and knowledge are even more important than relatability, or the entertainment factor (creativity or humor)

Impact Of The Following Influencer Traits On Brand Engagement - % A Lot

- Honesty: 67%
- Authenticity: 61%
- Knowledge: 60%
- Confidence: 53%
- Relatability: 52%
- Creativity: 47%
- Humor: 43%
- Empathy: 41%
- Charisma: 38%

Line representing average of all traits
AVG = 51%

Note: Trend is consistent across all generations
To ensure authenticity choose influencers who share personal experiences and engage in 1:1 conversations

We know that authentic influencers drive brand engagement. Brands should collaborate with influencers who naturally weave in these elements into their content to build that genuine connection.

Top Three Reasons Influencers Comes Across As Authentic...

- 58% Sharing personal experiences
- 62% Showing evidences and facts
- 46% Engaging with audience comments
Rule #04

Match to purpose on Snapchat
People flock to different platforms for different interests, especially relying on Snapchat for personal connections.

Motivations Behind Visiting Platform - % Selected

- Other platform

Connect with friends & family  Connect with their community  Stay current on the latest news  To learn more about topics of interest

- 57%

Survey Q: For what purposes do you use the following social media platform(s)?
Similarly, Snapchatters use the platform to stay connected with creators as well

#1 Reason Why Snapchatters Follow Creators on Snapchat

Follow creators on Snapchat for a look at their favorite creator’s daily life

57%

YOUR CONTENT CREATOR POSTED TO THEIR STORY!
To dive deeper into how people feel about creators, we asked participants to go through a content viewing exercise.

Participants viewed content from creators on a platform they regularly use.

Note: Each participant watched a single piece of content.

They were then asked to answer questions on the content, brand, and creator.
Creators on Snap are seen as friends, emanating authenticity

After viewing the content, Creators...

**Creator Perception By Platform in Snapchat and Other Platforms**

- **FELT LIKE A FRIEND**
  - Other Platforms: 40%
  - Snapchat: 55%

- **CAME ACROSS AS GENUINE**
  - Other Platforms: 59%
  - Snapchat: 67%

US Only | Snapchat n=252, Other Platforms n=927 | Creative feedback section
Survey Q: Now we’d like to get your thoughts on the influencer in the video. How did you feel about them?
For content testing in the US participants were randomly exposed to a piece of creator content from a platform they used.
*Difference statistically significant at 90% confidence level
Creator content on Snap comes across as...

Response To Creator Content On Snapchat
- % Strongly Or Somewhat Agree

65% of Snapchatters agreed that the content felt authentic

65% of Snapchatters agreed that content felt trustworthy

And these traits lead to positive results for featured brands

% of Snapchatters that Expressed interest in

51% Researching the product after viewing the content

49% Purchasing the product after viewing the content

Snapchatters across all markets: n=1,259 | Copy feedback section
Survey Q: How much do you agree or disagree with the following statements about the video you just watched?
Survey Q: After watching the video, how likely are you to research/consider purchasing the product?
Leverage influencer marketing on Snap by integrating a personal touch, mirroring the genuine connections users seek.

#1 thing people expect from influencers on Snap is **enhanced interaction through polls and quizzes**.

Survey Q: For what purposes do you use the following social media platform(s)?

- Share personal experiences
- Engage with audience comments
Our recommendations

1. Brands can benefit by integrating influencer collaborations into their media plans, given that people instinctively rely on influencer content for product recs & tutorials. Moreover, the vast majority are open to sponsored influencer content from brands.

2. Brands should meticulously choose an influencer strategy aligned with their industry, especially in sectors like finance where trust is important. In the authenticity era, people value influencers’ credibility and sincerity over mere entertainment, which also impacts purchase decision.

3. When planning an influencer marketing campaign on Snapchat, brands should capitalize on the personal connection people feel with influencers. Snapchat users seek personal connections, extending this bond to influencer content, where the influencer becomes a trusted confidant in brand decisions.
THANK YOU