



INFLUENCE BY THE NUMBERS: THE TRUE IMPACT OF CROSS-SOCIAL INFLUENCER MARKETING

 FULLSCREEN |  Shareablee | Q1 2018

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INTRODUCTION

Over the past few years, influencer marketing has become a valuable asset in the savvy brand's arsenal. Factors such as the rise of ad blockers and the erosion of trust in traditional advertising have forced brands to look for new ways to market their products and services.

Enter influencers. Digital creators are on the pulse of what fans adore; many boast thousands or even millions of social followers who are the exact demographic brands want to reach, and who are often highly engaged with influencers' content. Influencer marketing on Instagram alone was reportedly worth around \$1 billion in 2017, with the entire influencer marketing industry projected to reach anywhere from \$5-10 billion by 2020.¹

In the spring of 2017 a new trend emerged, changing the way advertisers and brands approached their marketing strategies. Micro-influencers rose to the forefront of the scene and became hot commodities, with brands seeking them out and partnering with them on product integrations, shout-outs, and other forms of branded content.

Various firms and publications raved about these digital stars – who by definition boast (relatively) small followings of fewer than 100K – because they were considered more cost-effective than pricier top-tier digital creators or A-list celebrities.² Essentially, since many micro-influencers are everyday consumers themselves who have managed to build small but loyal followings, brands believed they'd see higher ROI in terms of engagement, brand awareness, purchase intent, and other influence-based KPIs when partnering with these creators.

Upon closer look, however, many of the commonly cited statistics and analyses related to micro-influencer effectiveness were a tad misleading. These studies didn't always provide a more comprehensive picture of influencer marketing partnerships, and tended to focus more narrowly on the divide between follower counts and engagement rates – suggesting that these rates were equivalent to actual social influence. In similar fashion, the anecdotal examples of micro-influencer effectiveness usually referred to just one social platform (like Instagram or Facebook), didn't represent a statistically significant sample size, and were rarely audited by third parties.

It's time we got a more accurate representation of the impact of influencer marketing. That's why Fullscreen partnered with social media analytics firm Shareablee on a study during the fall of 2017. This study aimed to uncover the true value influencers deliver for brands across multiple social platforms, not just a single one. Additionally, the study analyzed several tiers of digital creators beyond the micro-influencer level and how these different tiers perform in terms of engagement, generation of brand trust, and purchase intent with consumers.

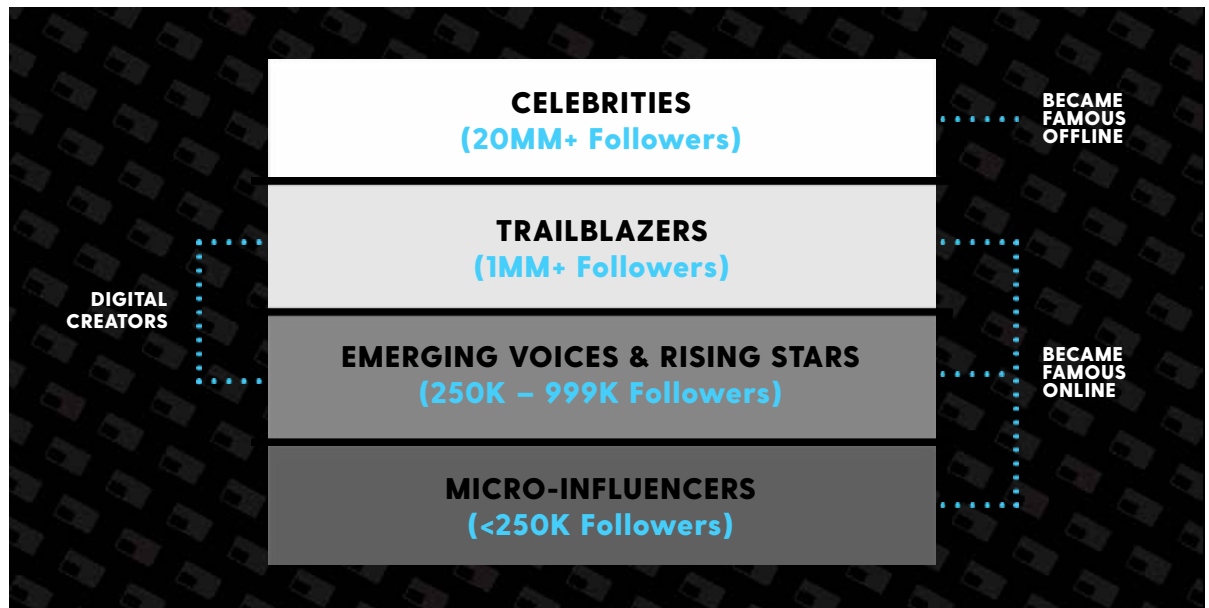
¹<http://mediakix.com/2017/03/instagram-influencer-marketing-industry-size-how-big/#gs.awyqx1g>

²<http://www.adweek.com/digital/micro-influencers-are-more-effective-with-marketing-campaigns-than-highly-popular-accounts/>

METHODOLOGY

A study is only as good as its sample size. Fullscreen and Shareablee analyzed a large sample of 31,802 influencers in order to generate substantiated, statistically meaningful insights.

Using always-on metrics such as engagement rates, actions, followers, and more, we analyzed these influencers' social content posted between January 1, 2017 and September 30, 2017 on Facebook, Instagram, YouTube, and Twitter. To evaluate the relative performance of different types of creators, our 31,802 influencers were segmented into the following tiers based on their cross-social follower counts:



Additionally, Fullscreen and Shareablee dove into the consumer sphere to determine the impact and perception of branded content from influencers. We gave surveys to 1,200 participants aged 18-34 who had engaged with the content of influencers in some way on any of the previously mentioned social platforms. The results of this feedback helped contextualize the qualitative impact of branded influencer content, in addition to its measurable outcomes.

FINDINGS

PART ONE: CONTENT ANALYSIS

The first part of our study analyzed the influencer content itself - where creators most frequently post their content, the type or format of content being posting, and the relative levels of sponsored content. This information creates a foundation for the second part of the study, which analyzes the actual impact this content has on consumers and whether or not it causes them to take action.

Content By Platform

Looking at the volume of posting on the social accounts of the study's sample group, Fullscreen and Shareablee discovered that across all four platforms (Facebook, Instagram, YouTube, and Twitter), **all influencers post the highest volume of content to Twitter**, with each tier posting at least 45% or more of their total social content to that platform.

- ▶ Micro-influencers post the most content to Twitter at nearly 60% of their total body of content across all their social accounts.
- ▶ Trailblazers aren't far behind, with 55% of their total social content found on Twitter.
- ▶ Emergers/risers are next, having posted roughly 50% of their total content to Twitter.
- ▶ Finally, celebrities use Twitter to distribute about 45% of all their social content.

Facebook was the second-highest platform for content volume, with influencers posting anywhere from 25-37% of their total content on that social media site. Instagram hosts anywhere from 12-17% of all influencers' content, while digital creators use YouTube to post less than 1% of their content (micro-influencers) all the way up to 8% of their total content (trailblazers).

SOCIAL POSTS BY PLATFORM

WHERE POSTED	MICRO-INFLUENCERS	DIGITAL EMERGERS & RISERS	DIGITAL TRAILBLAZERS	CELEBRITIES
YouTube	>1%	3%	8%	1%
Facebook	28%	33%	25%	37%
Instagram	14%	14%	12%	17%
Twitter	58%	50%	55%	45%

To be read: 28% of micro-influencers' overall social posts are distributed on Facebook.

Content By Attributes/Types

Next, we looked at what influencers were sharing. The types of content generated by the influencers in our sample varied from one social platform to the next:

- ▶ On Facebook, for example, all tiers of influencers are more **likely to create photo and video posts** than they are to create simple link-based or status updates (though celebrities post the majority of the link posts at 41% of the total content analyzed on Facebook).
- ▶ **Link-based content** is popular on Twitter; anywhere from 55-85% of all influencers' content posted to Twitter provided some type of URL or link.
- ▶ Photo content is unsurprisingly the preferred content type of all influencer tiers on Instagram (with 74-92% of their total content on the platform assuming this format), but **posts including hashtags** are also prominent at 43-78% of influencers' total content.

While all tiers of influencers were found to partner with brands on sponsored content, celebrities were actually the least likely to do so at <1% of their total content on Twitter to just 2% of their total content on Instagram. Digital-native creators are far more likely to work alongside brands:

- ▶ **3%** of micro-influencer content on Facebook was co-branded, with emergers/risers and trailblazers claiming 2% co-branded content.³
- ▶ Micro-influencers and emergers/risers again claim higher levels of co-branded content on Twitter than other tiers at **6%** each.⁴
- ▶ Instagram boasted the highest rate of co-branded or sponsored content across influencers, with micro-influencers and emergers/risers labeling **8%** and **7%** of their content as sponsored, respectively.⁵

Content Engagement by Platform

Although all influencer segments post less than 20% of their total social posts to Instagram, this posting impressively accounts for over 60% of total social engagements. This is driven by Instagram's higher engagement rate relative to Facebook, Twitter, and Youtube. Fullscreen and Shareablee discovered micro-influencers and celebrities generate the most engagements from Instagram, at 86% and 83% respectively.⁶

This reliance on Instagram for driving engagements is far less significant for digital creators. Emergers/risers and trailblazers see higher levels of their total engagements (like, comments, shares, etc.) coming from Youtube - 11% and 24% respectively.⁶ Social video posting at large, and specifically on Youtube, requires a real commitment from influencers and thus creates a higher barrier to entry in the space. Digital creators have dedicated themselves to the platform in a way that both celebrities and micro-influencers have yet to do.

SOCIAL ENGAGEMENTS BY PLATFORM				
WHERE POSTED	MICRO-INFLUENCERS	DIGITAL EMERGERS & RISERS	DIGITAL TRAILBLAZERS	CELEBRITIES
YouTube (views excluded)	1%	11%	24%	1%
Facebook	10%	13%	7%	10%
Instagram	86%	70%	61%	83%
Twitter	3%	6%	8%	6%

To be read: 11% of digital emergers & risers' total social engagements (likes, comments, shares) occur on Youtube.

³ Facebook co-branded content is posts created with partner advertisers.

⁴ Twitter co-branded content is posts created with partner advertisers and determined by a relevant hashtag (#ad and/or #sponsored).

⁵ Instagram co-branded content is posts created with partner advertisers and determined by a relevant hashtag (#ad and/or #sponsored).

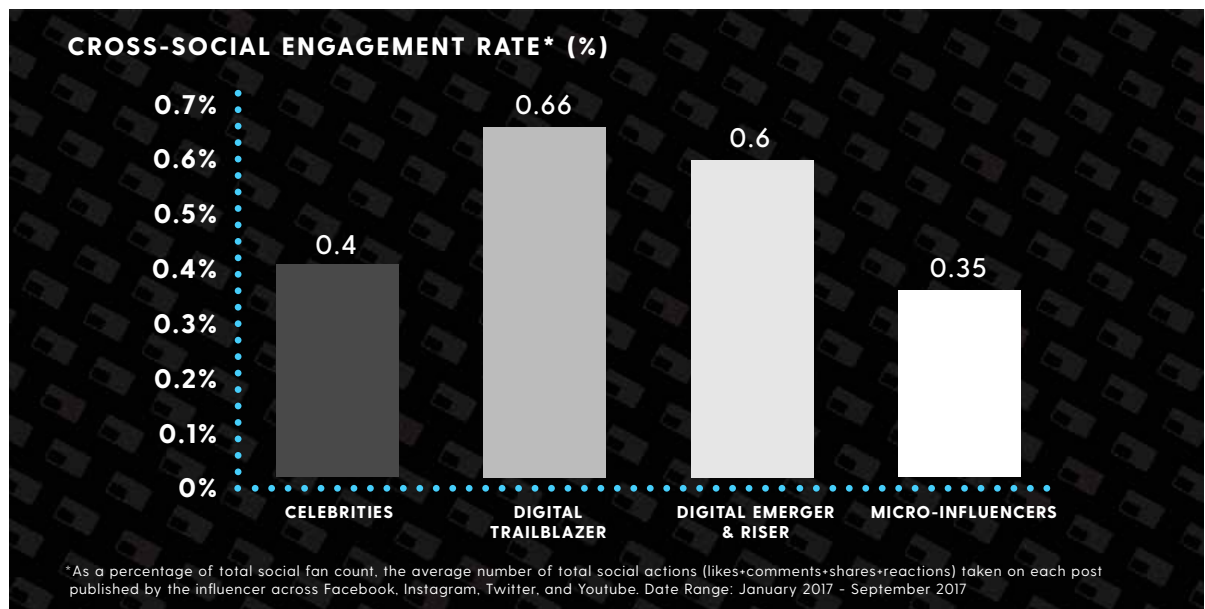
⁶ Engagement rates for YouTube exclude video views.

PART TWO: BEHAVIORAL SEGMENTATION OF INFLUENCERS

But enough about the nitty-gritty. In order to get the big picture of influencer marketing, Fullscreen and Shareablee focused not just on the types of influencer content being posted, but also on the resulting levels of engagement. And furthermore what does that engagement translate to beyond likes, comments, and shares? Does partnering with a specific tier of influencer really generate new business for brands? No worries: we found the answers to these questions and more.

More Followers ≠ Less Engagement

Overall, this study revealed mid-tier Influencers – emergers/risers and trailblazers – have the most engaged fans, providing the best engagement rates on average across the major social platforms. Trailblazers in particular generate the highest levels of engagement at 0.66%, while emergers/risers follow close behind at 0.60%. And while micro-influencers tend to be heavy on Instagram, the most engaging social platform, on average their posts see just 0.35% engagement rates, less than half that of emergers/risers and about a third the amount of engagement from trailblazers. While behind digital creators we even see celebrities out-performing micro-influencers in terms of engagement. Overall this data goes against the common perception that there is an inverse relationship between follower counts and engagement rate.



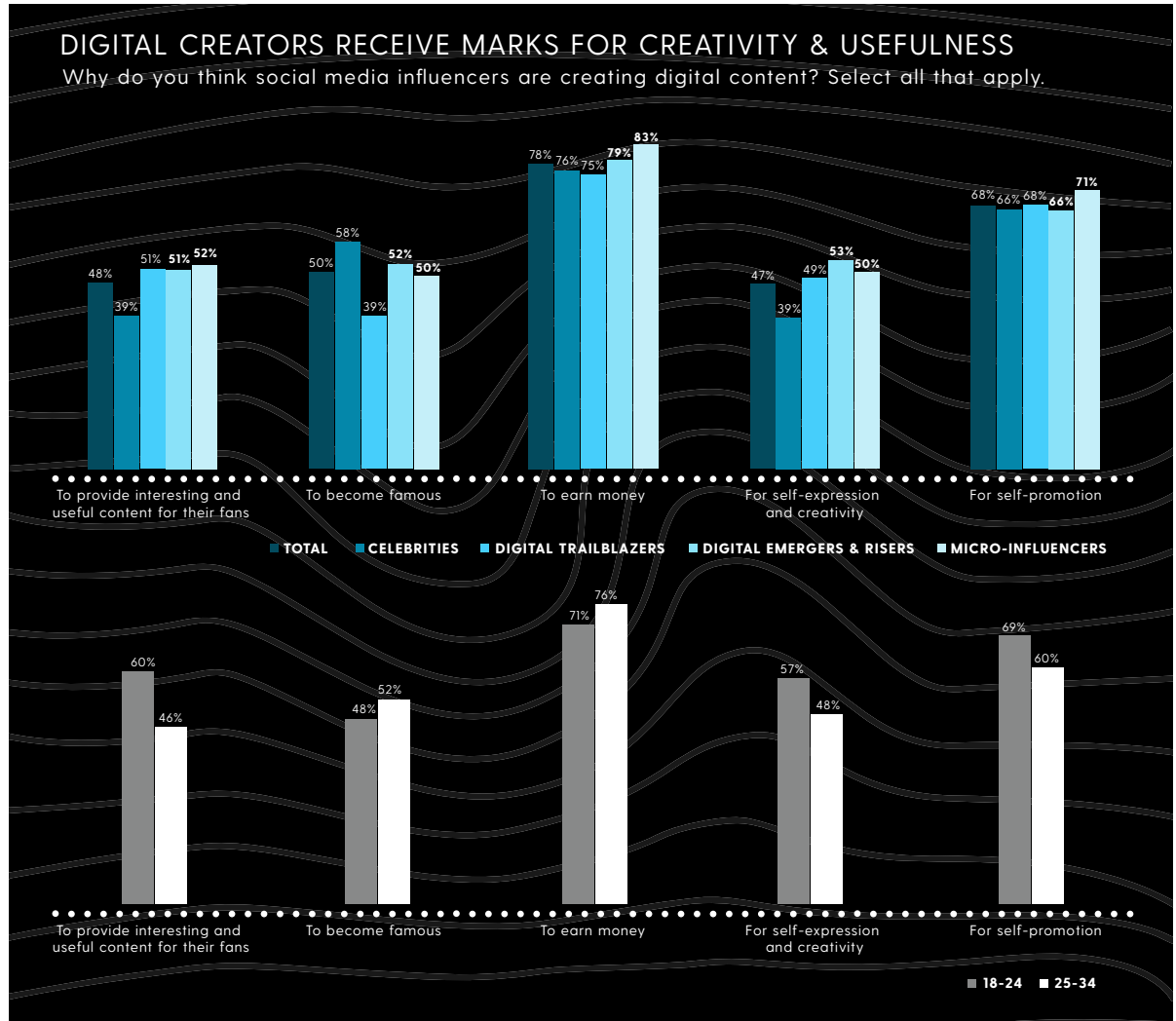
Intention Behind Content

Fans can sense an inauthentic sales pitch a mile away. That's why the perception of influencers and their content is a key factor in whether or not these fans choose to pay attention to (or ignore) branded content from these same influencers. As such, the Fullscreen and Shareablee survey asked fans to provide their thoughts on why social media influencers create digital content.

The majority of participants (**78%**) believe the primary intention behind influencer content is to earn money, with consumers believing micro-influencers are the most likely to have this intention when creating content. Likewise, 68% of consumers believe self-promotion drives digital creation, and 50% of them believe influencers create content to become famous.

But while fans recognize the cash incentive behind branded content posts, nearly half of them also believe influencers create content to provide “interesting and useful content to fans” (**48%**) and “for self-expression and creativity” (**47%**). On average, every tier of digital creators performed better on these altruistic metrics than celebrities.

Younger generations in particular are able to overlook the practical, business-venture side of influencer content and support the altruistic ideals of creating useful content for their fans and for self-expression and creativity. While participants aged 25-34 were more likely to believe in fame or money-driven intentions, those participants aged 18-24 were far more likely to say influencers are making content for useful or creative reasons than those consumers aged 25-34.

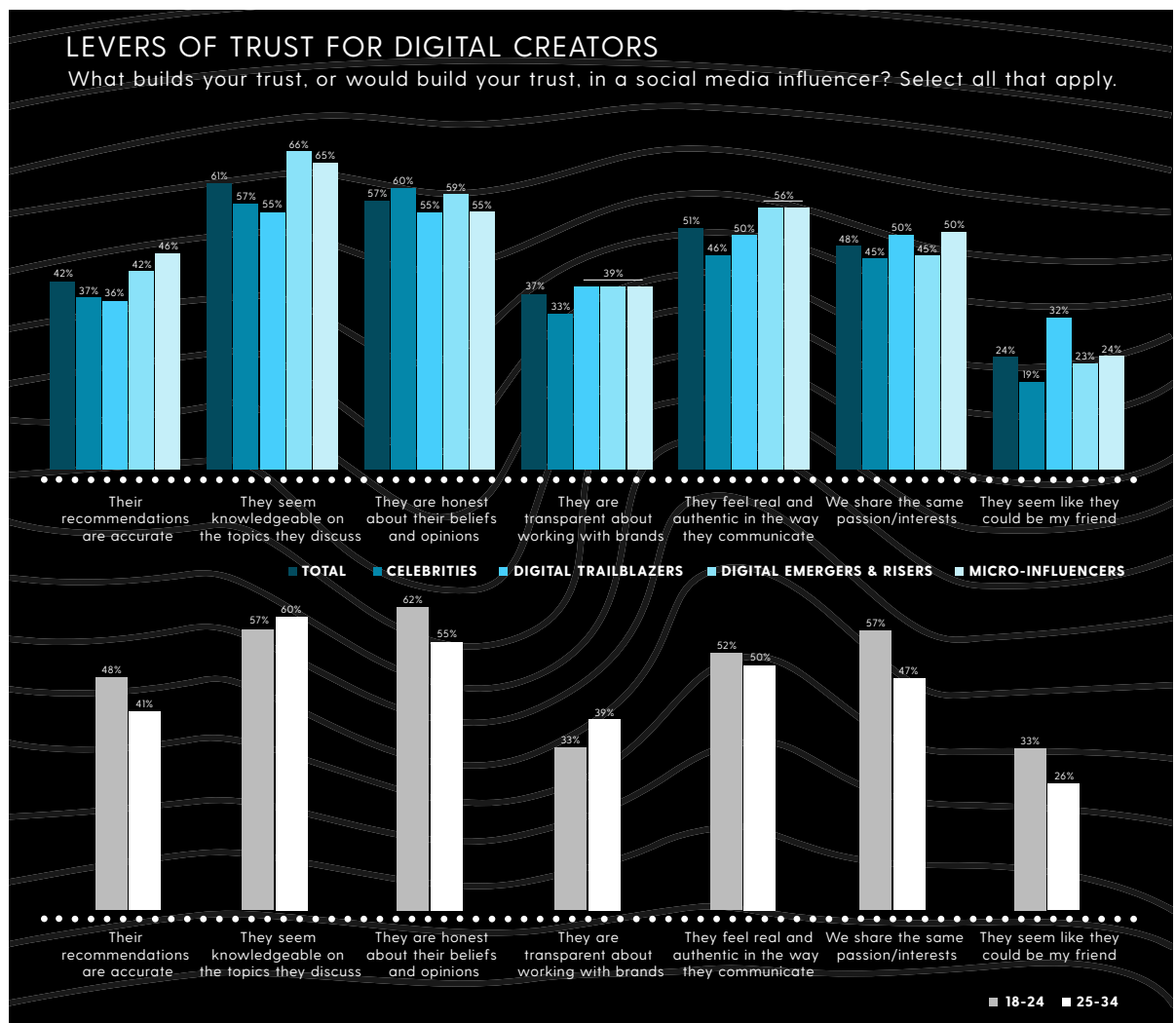


Consumer Trust In Influencers

When influencers earn fans' trust, so do the brands they work with. Fullscreen and Shareablee asked participants how their trust in brands would be affected by influencer content. More than a third of participants (**37%**) claimed they'd be more likely to trust a brand after seeing an influencer promote it. Likewise, almost **40%** of survey participants said they'd be more likely to trust what an influencer says about a brand more so than what the brand says about itself. In general, more than half of adults aged 18-24 (**55%**) are willing to trust influencer posts, compared to just 37% of adults aged 25-34. However, this older demographic is actually the most likely to trust influencer messages about brands over brands' own messages at **44%**, compared to only 36% of younger audiences.

The tier of influencer which receives the most trust from consumers on average is the **trailblazer**, with **45%** of study participants saying their trust in a brand would strongly or somewhat increase if exposed to brand mentions by this particular tier of influencer. Micro-influencers were the next most-trusted tier with a 42% likely increase in trust, while emergers/risers followed up at 34% and celebrities finished at 29%. Similarly, **all three tiers of digital influencers** appear to be most trustworthy to consumers over celebrities, with anywhere from **41% to 44%** of participants claiming they would trust what these influencers say about a brand over what the brand says about itself, versus just 29% with celebrities.

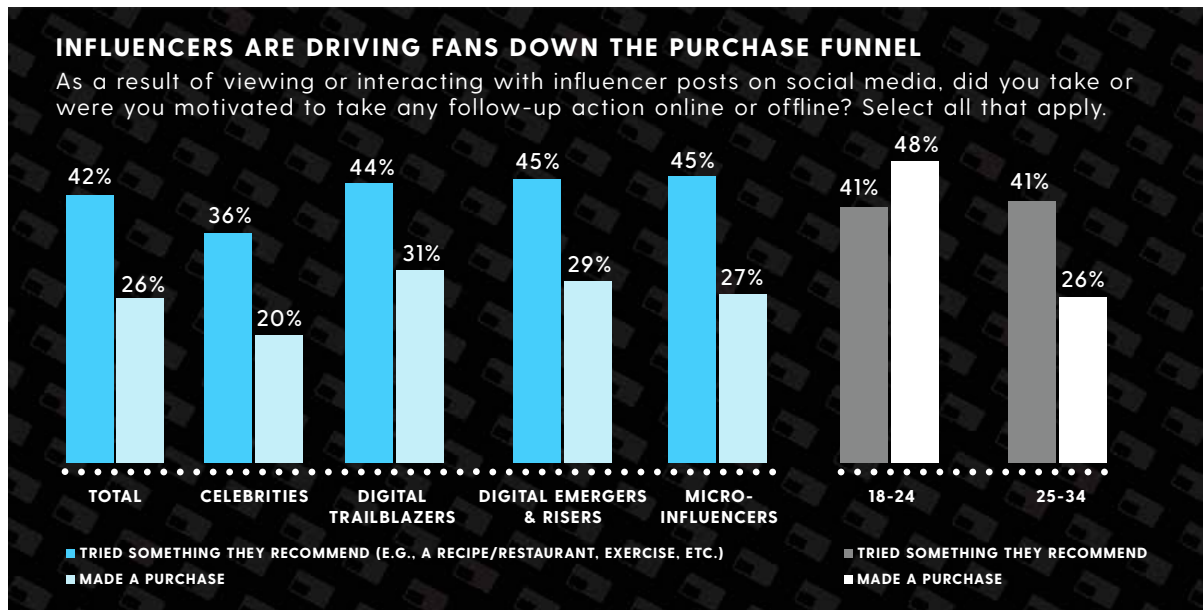
Survey participants could also select a few different reasons for what builds their trust in social media influencers. Most participants (**57%**) stated that **influencers' knowledge** about their area of interest would increase their trust, especially as it relates to emergers/risers – 68% of participants believe this tier is knowledgeable. More than half (**51%**) of consumers say they trust influencers because of the authentic and real way they communicate, followed closely by 48% of participants who say shared interests and passions drive trust. Trailblazers were the most likely tier of influencers to seem like a friend, with **32%** of participants referencing the friend-like nature of such creators (younger consumers in particular supported this factor in terms of driving trust).



Consumer Actions From Trust

While engagement with and trust in influencer content is of course good news to brands, these two metrics shouldn't be the only measurements of success when analyzing the true influence and impact of digital content creators. To that end, participants in Fullscreen's study were asked to provide feedback on whether they had taken any sort of action, either online or offline, after viewing or interacting with influencer content. The results of this question were favorable, with almost half (**42%**) of consumers exposed to influencer content saying they had tried something an influencer recommended and **26%** saying they had made an actual purchase.

Trailblazers and micro-influencers set themselves apart in this portion of the study, proving their valuable partnership opportunities for brands interested in generating more interest and sales in their products or services. **Trailblazers** are the most likely tier of influencer to convince viewers to **make a purchase** at **30%**, while **micro-influencers** are excellent at getting consumers to **try one of their recommendations** at a **45%** success rate. And while both age demographics in the study reported nearly equal percentages of trying recommendations after engaging with influencer content, adults 18-24 are more willing to make purchases at **48%** compared to just 26% of adults 25-34.



TAKEAWAYS

1. While most influencers post the majority of their cross-social content to Twitter, brands looking to stand out from the crowd should consider working with influencers on content specifically created for other platforms.
2. Marketers need to leave behind the idea that large followings equal low engagement rates and small followings equal high engagement rates. This study found that digital creators with a mid-range of followers had the highest rate of engagement across social platforms. As such, brands need a more nuanced approach to partnering with influencers based on their goals. For example, if a company wanted to reach new audiences on YouTube, it could partner with an emerger/riser or trailblazer while also considering deals with micro-influencers or celebrities on Instagram.

3. Brands and influencers should work together to create great content that's not only optimized for the influencers' unique audiences, but also formatted specifically for each platform. For example, while engagements per video post on Instagram are actually slightly lower than photo posts, marketers should consider adding videos into the mix to latch onto the strong growth of this format – and as a way to differentiate themselves from a sea of images.
4. Digital creators of all tiers (micro-influencer to trailblazer) are far more likely than celebrities to be seen as creating digital content for creative or useful purposes. Younger generations in particular are more willing to believe in an influencer's altruistic intentions, which means they could be more receptive to the messages brands present them through influencer partnerships. Overall, brands should carefully consider partnering with celebrities if they want to appear more genuine, especially to younger consumers.
5. Digital creators are masters at driving trust for brands. This trust is mostly driven by consumers viewing digital creators as not just knowledgeable and honest, but also by seeming like they could be consumers' friends. Brands can capitalize on the strong connection between digital creators and their fans to drive trust.
6. Influencers have a solid success rate of getting consumers to take action after they've engaged with content from these creators. Therefore, brands interested in driving more awareness of their name, products, or services should look to micro-influencers, as they inspire the most action from consumers. Meanwhile, Trailblazers will offer brands the most success at sales, especially with younger generations.

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About Fullscreen

Fullscreen empowers talent and brands to build and monetize highly engaged, social-first audiences. The company is a global leader in social-first entertainment experiences serving creators, brands and consumers. As a leader in branded content and social marketing services, Fullscreen partners with major brands seeking to engage valuable, elusive youth audiences on social platforms through original entertainment, influencer marketing, multi-platform social content and targeted media through the Fullscreen Video Network. Serving a broad range of clients from offices in Los Angeles, New York, Chicago, and Atlanta, Fullscreen's rapidly growing brand marketing teams are defining the future of social-first, content-driven marketing.

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