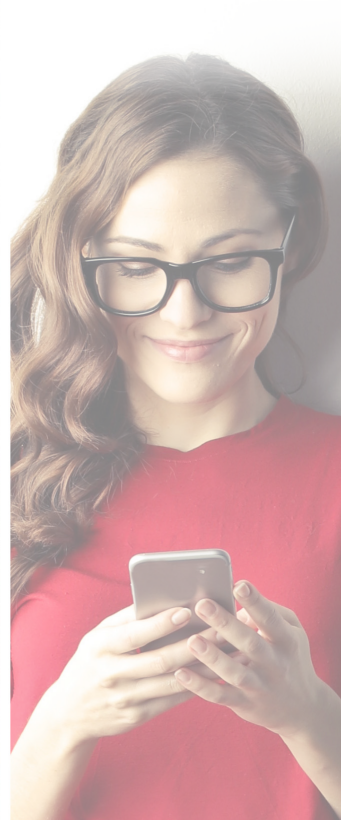
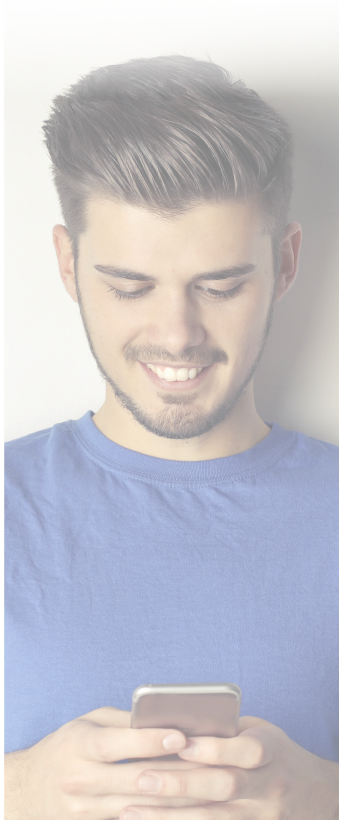
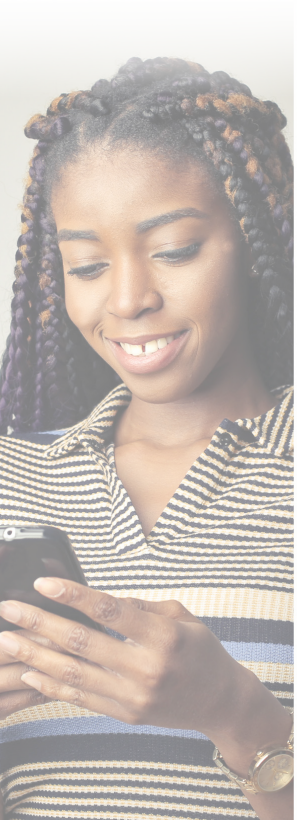


THE INFLUENCER REPORT 2019

Survey Findings, Trends, and Forecasts

by PR News and Meltwater



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Meltwater

Influencers are so new to communications and marketing that the term still lacks a clear definition. The general public's image of an influencer is a celebrity endorser. But is a journalist at an established publication also an influencer?

Is an independent blogger an influencer? Can an employee of your company be an influencer? What about your CEO?

And a consultant who receives payment from several companies in your industry—is that person an influencer?

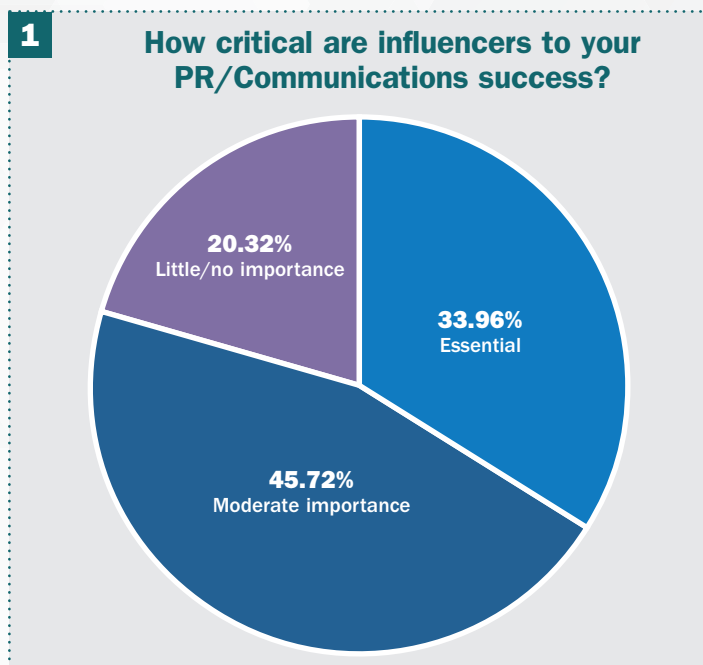
Is the definition of an influencer restricted to someone with a few million social followers on YouTube or Instagram? What about a person who has relatively few but intensely loyal followers? Is that person an influencer?

There are also questions concerning payment. Is it ethical for an influencer to receive money for content they produce? Or does that compromise the influencer's integrity? What about if she refuses to accept money but receives goods and services or free trips in exchange for content?

It's clear at this early period in the evolution of influencers, definitional questions remain. More certain, though, is that the ability to create and distribute content on social media has cemented influencers' importance.

This is evident in a new survey from PR News and Meltwater, a media intelligence company. Conducted during Q4 2018, the far-ranging survey received nearly 400 responses from U.S.-based PR professionals.

In addition to gauging the importance of influencers to marketing and communications, the survey asks how and why brands are using influencers, how much (if anything) brands pay them, and what issues arise from their use.



Source: PR News/Meltwater, 2019.

Strong Rate of Use

Not long ago the longevity of influencer marketing and communications was questionable. Not anymore.

As you can see from chart 2, an overwhelming majority (82 percent) of the survey respondents indicate they are either using influencers or are considering it. Nearly half those surveyed (49 percent) say they currently use influencers.

“It’s heartening that [more than] 80 percent of PR professionals find influencers important to their success,” says Danica Kombol, CEO at Everywhere Agency. “This was certainly not the case a few years ago.”

[Note: Those who told us in question 2 that they don’t use influencers were asked to answer a different series of questions. These dealt with how influencers might figure into their brands’ and organizations’ plans when and if they decide to use them (see charts 12-18 on pp. 6, 8-9).]

Just 18 percent say that they are not using influencers and have no plans to do so (chart 2).

Similarly, just 20 percent say influencers are of “little or no importance” to their brand or organization’s PR and communications success (chart 1).

Krista Todd, VP, global communications at Logitech, which manufactures peripherals for personal computers and mobile devices, was surprised that as many as 20 percent of respondents had yet to jump on the influencer bandwagon. “I suspect that figure will decline next year to 10 percent or less,” she says.

“Influencer relations is not going away,” Todd says. “There is relevance in influencer relations for B2C and B2B companies and across vertical industries.”

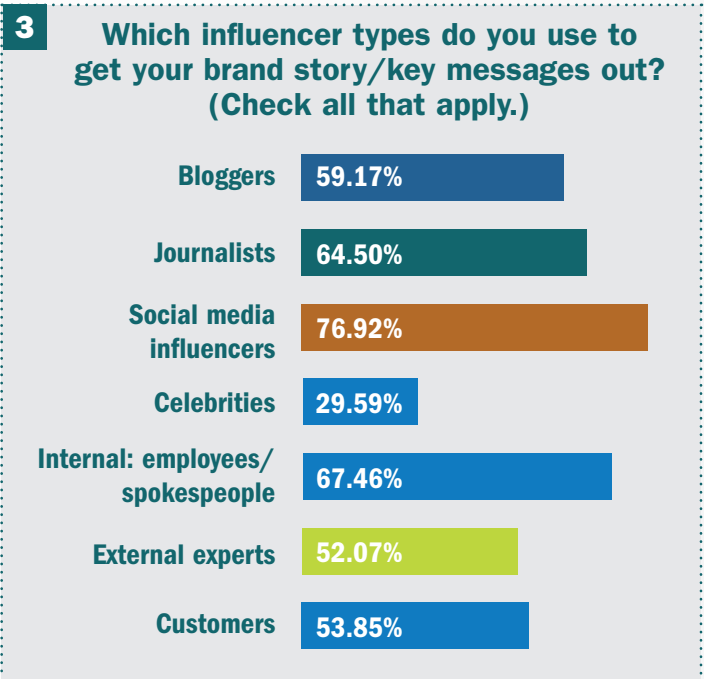
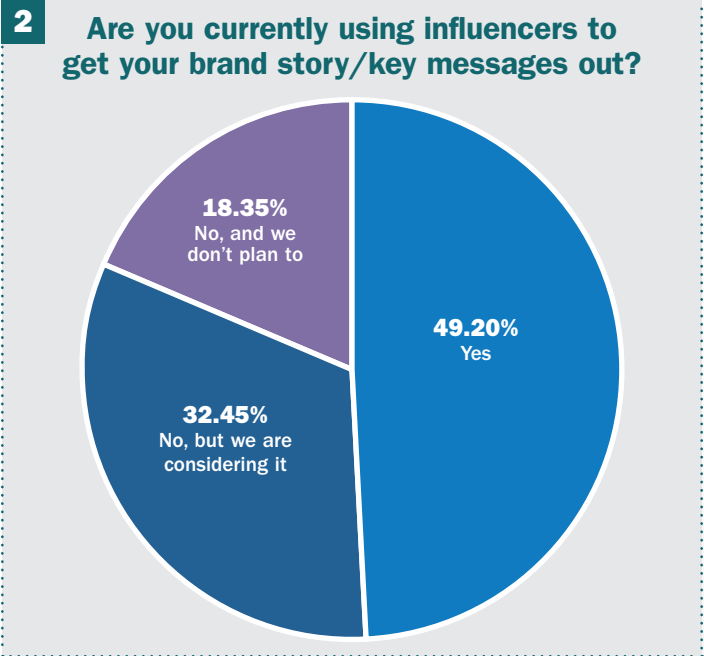
The definition of influencers is something Nicole Dye-Anderson, AVP, media relations at Barclays, the bank and financial services company, has thought about a lot.

“With newsrooms shrinking, more and more journalists are looking to those I consider media influencers as experts.” For her, media influencers are not traditional reporters, but are conduits to them.

“I reach out to media influencers...and educate them about my products because I know journalists will contact them” as sources of credible information when they’re writing stories.

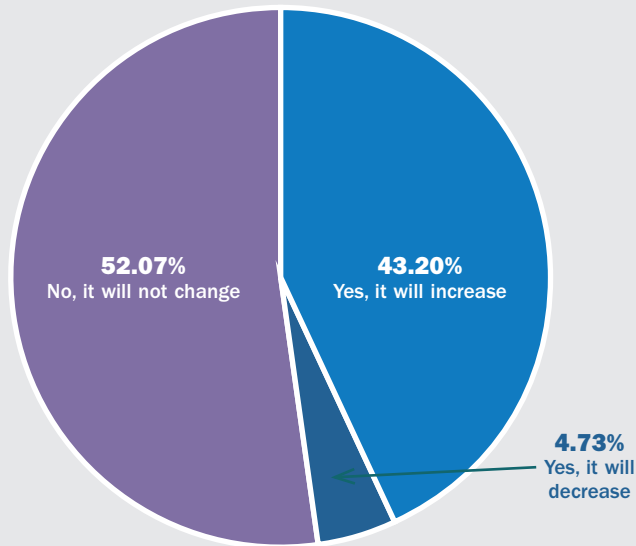
Media influencers, she says, also have their own following. She’ll pitch material to them so they can create content for those followers. “They aren’t under the same constraints as traditional media,” she adds, so she adjusts her pitches. For example, traditional journalists often won’t or can’t spare three days to attend an event; she’s found influencers will.

Though media influencers are “integral” to her work, she continues to pitch journalists, too. “It’s like double dipping.”



4

In the coming year do you project your influencer budget will change?



Good Financials

Another indication of influencers' increasing acceptance is budget. A whopping 95 percent of survey respondents said spending plans for influencers will either rise (43 percent) or remain steady (52 percent) in the year ahead (chart 4).

It's clear why brands continue to spend for influencers: they believe it's worth the money. The majority (70 percent) say their companies' use of influencers has delivered a positive ROI or a break-even result (chart 9).

But 30 percent of those surveyed say they don't know if influencers were a good or bad investment. This seems to indicate a lack of concern for measurement. It could also reflect an inability to know how best to measure influencers' ROI.

This response is in contrast to the data in chart 10, where just 8 percent say they don't measure influencers' impact.

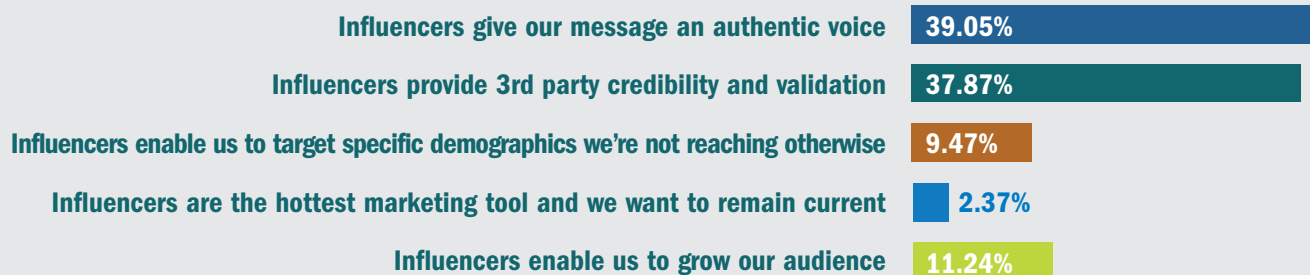
More concern about ROI is seen in chart 11, however, where 34 percent say their biggest issue with influencers is "the ability to prove ROI."

Says Todd, "The ability to prove ROI is still one of the biggest challenges the industry faces. We need to make it easy to measure what matters."

To make it easier to measure, establish goals at the start of an effort. "If the goal is awareness, then measure reach and impressions," Todd says. "If the goal is engagement, then measure engagement totals and engagement rates." And measure results on both influencer channels and on your owned channels. "You'll identify trends for each and they will vary as you both have different audiences," she says.

5

What is the main reason your brand uses influencers?

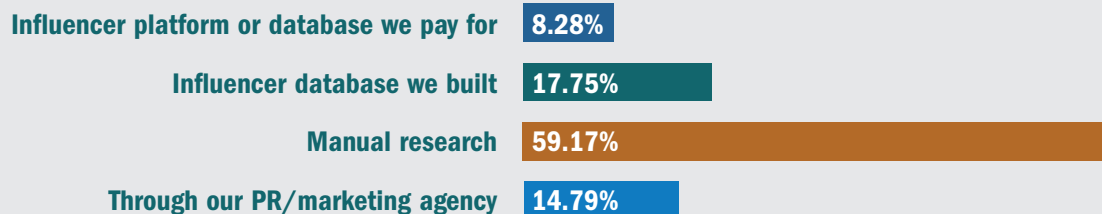


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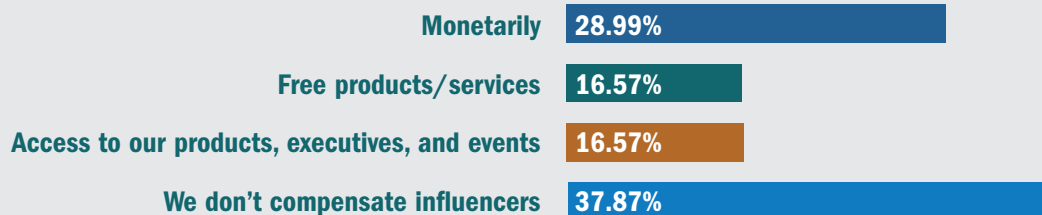
How do you use influencers? (Check all that apply.)



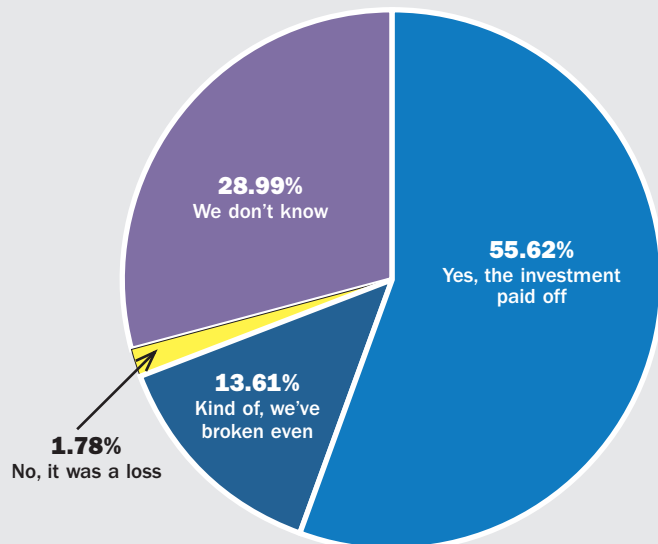
7 What is the primary way you uncover/identify relevant influencers?



8 How do you compensate influencers?



9 Have the influencers you've used delivered ROI?



To Compensate or Not?

Also in the area of finance, compensation of influencers is an open question. As you can see in chart 8, 29 percent of respondents pay influencers with money, and 38 percent do not compensate them in any way. The remaining respondents offer influencers either free products/services or access to products and executives.

This seems to signal a disconnect. If influencers are as important to communications and marketing as this survey indicates, it seems incongruous not to compensate them.

"It's disappointing that a full 40 percent are not compensating influencers, though I realize the pay-to-play model is anathema" to communicators, Kombol says. She points out, however, that Federal Trade Commission rules for influencers disclosing sponsorship arrangements offer a "clear and ethical path toward compensation."

Dye-Anderson is upbeat about the responses regarding compensation in chart 8. Compensation arrangements "should be a mix," since communicators have various needs. Communicators who oversee the social media portion of their brand need and use celebrity influencers. These communicators should pay their influencers, she says.

When Barclays recently launched a credit card with a brand in Hawaii, she created "experiences" for media influencers, where Barclays arranged for their airfare, hotel, board and various experiences it created for them. Dye-Anderson does not pay media influencers outright.

But she admits "times are changing and this is people's bread and butter, so we have to figure out the right mix where they can maintain credibility and integrity."

For Todd, "The lack of compensation surprised me...this is business for influencers...it's important to put an official agreement in place with details and commitments from both sides, including compensation." She believes more companies eventually will begin paying influencers.

How do you measure the impact of influencers?



Pain Points

It’s important to look again at chart 11, which identifies the main difficulties with influencer use. The top pain points represent the full influencer lifecycle, from finding and managing influencers to proving their ROI.

In order of most painful, our respondents say proving ROI leads (34 percent), uncovering/identifying influencers is next (22 percent) and the time needed to manage campaigns is third (19 percent).

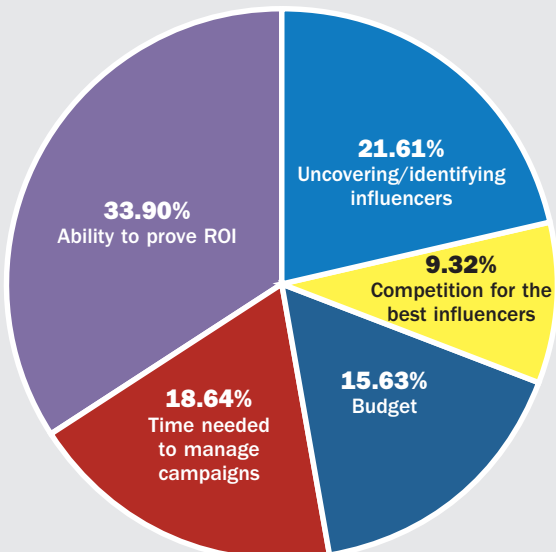
Chart 11 tracks with chart 7, which indicates finding influencers is both a pain point and a resource drain. Asked how they find influencers, the majority of respondents say “manual research” (59 percent), far outdistancing in-house databases (18 percent) and outside PR agencies (15 percent).

Chart 7 has several interpretations. One is that communicators have yet to find and/or embrace custom tools for finding influencers as well as managing and measuring campaigns.

Another view is that the influencer ecosystem is uneven. While our study shows advances in influencer marketing, influencer search seems stuck in its formative stage. Having unarmed communicators battle the vastness of social media in search of the right influencers for their brands and organizations seems incongruous in a high-tech, data-driven environment.

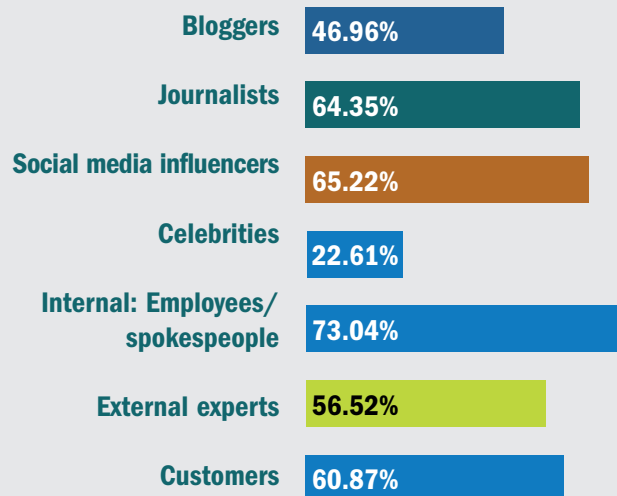
11

What is your biggest challenge with the rise of influencers in communications?



12

Which influencer types would you choose to get your brand story/key messages out? (Check all that apply.)



Authenticity and Validation

The survey also examines why brands use influencers. Common knowledge says brands desire to reach younger audiences. One way to do so is to engage the youth demographic where it lives.

Nearly half of teens (45 percent) tell the Pew Research Center they are online “almost constantly.”

And with video an increasing phenomenon (YouTube says it has nearly 2 billion monthly active users) and Gen Z (those born from the mid-1990s to the early 2000s) consuming 23 hours per week of video, it seems natural that brands would turn to influencers to appeal to the youth demographic. In fact, the number of influencers earning six figures annually via YouTube grew 40 percent in 2018.

The Youthful Demo?

Our survey (see chart 5), however, shows influencers’ ability to provide brands with an “authentic voice” (40 percent) and “third-party” credibility and validation (38 percent) are the main reasons they deploy influencers.

Using influencers to attract hard-to-get demographics (9 percent) and “grow[ing] our audience” (11 percent) were far less important to our survey participants. The consistency of thought in charts 5 (those who use influencers) and 13 (those who don’t) is interesting.

As Todd of Logitech says, “Bringing third-party credibility’ and ‘an authentic voice to your brand’ resonated with me.” The “recipe for success” is to match authenticity and credibility “with guidelines [for influencers] to create content that will resonate with audiences.”

The Definition of Influencers

The survey also asks about the kinds of influencers brands and organizations use. As you can see in chart 3, at least half the respondents who say they use influencers indicate bloggers, journalists, social media influencers, external experts and even customers are examples of what they consider useful influencers.

Note the small response to celebrities. For Todd, industry experts “are the new celebrities... that’s why celebrity influencers are down and social influencers are increasing.”

The survey shows there are many definitions of influencers. Chart 12 addresses this question, where respondents whose companies don’t yet use influencers weigh in on the issue. As you can see, the responses are similar to those in chart 3, whose companies use influencers.

Are Employees Influencers?

Kombol and Todd commented on the large number of participants (67 percent) who said their brands and organizations rely on employee influencers and spokespeople. “We definitely are seeing a trend where large companies are realizing their employees are among their best brand advocates,” Kombol says. “I think this signals a trend where we’ll see more corporations taking steps to build out an internal employee advocacy program.”

Todd adds, “I am happy to see so many respondents say they would use employees as influencers. This is so important and sometimes overlooked...employees are the most authentic brand ambassador influencers.”

At Logitech, for example, staff are encouraged to use an employee hashtag, #Logilife. The company, Todd said, “creates campaigns to drive excitement around” the hashtag.

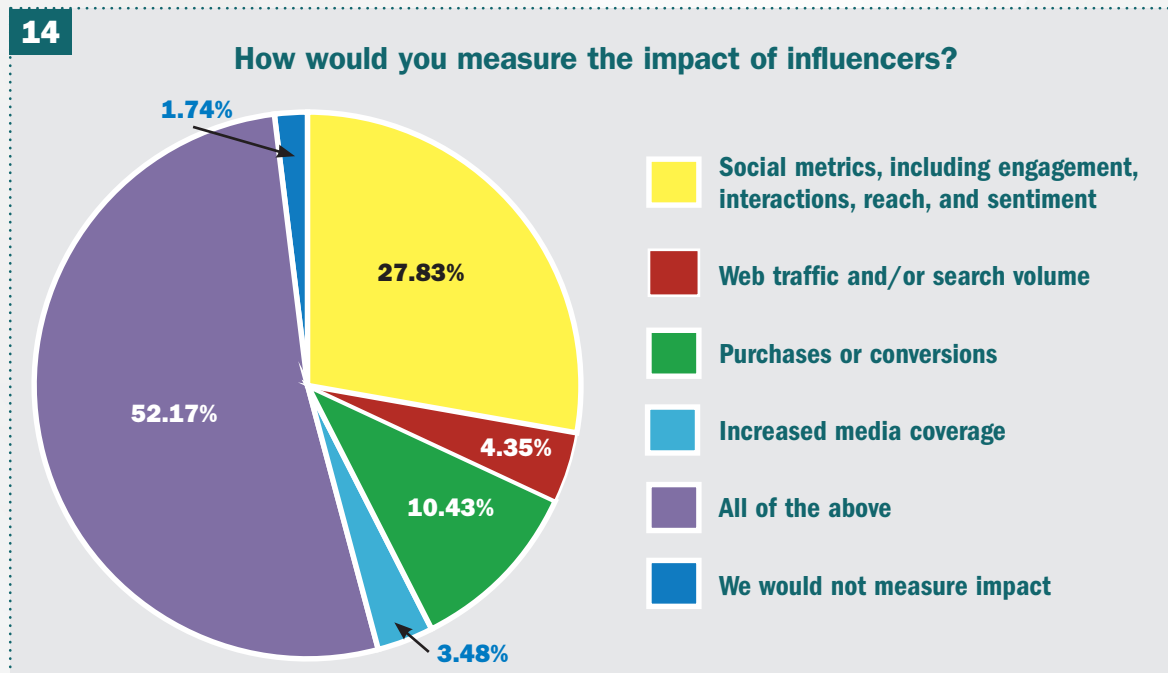
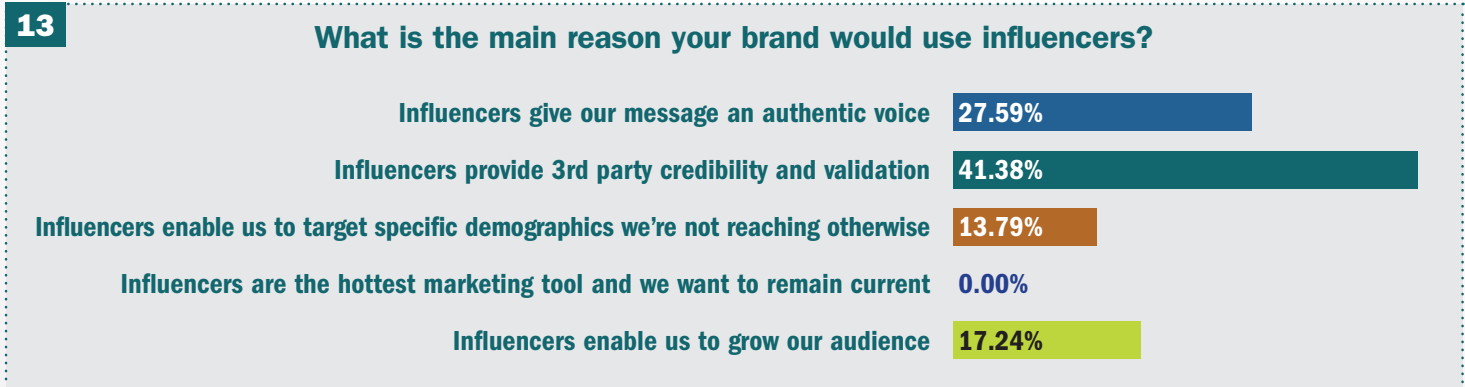
“We also rolled out LinkedIn Elevate, an employee ambassador tool that makes it easy for employees to share content with their communities.” A side benefit is the “excitement” this adds to the narrative about working at Logitech.

Dye-Anderson of Barclays, however, is among those who don’t consider staff to be influencers. “Employees have a message to transmit,” she says, and concedes brand ambassadors who also are employees “could be considered influencers, but not in a media relations sense...I look at media influencers as the new media.”

And she has requirements. In addition to their industry expertise, they must be unbiased. “The minute they’re not, they’re of no use to me since traditional media won’t reach out to them.”

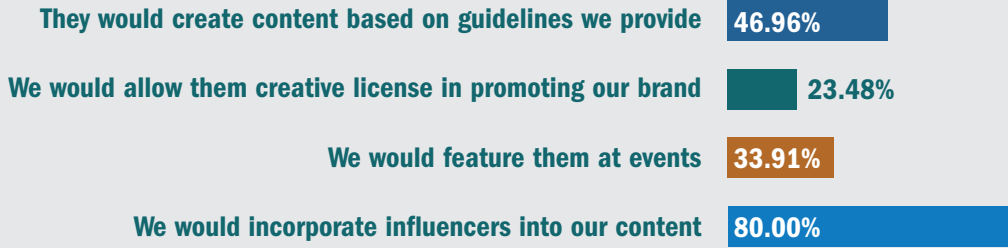
While the definition of influencer remains open and the approaches communicators take to working with them are in flux, it’s clear influencer marketing has pushed communicators to embrace social media, in part so they can understand their brand’s presence and the influencers who help shape it.

Editor’s Note: Those who said they don’t use influencers or plan to (chart 2) were asked questions shown in the charts below and in chart 12 (page 6).



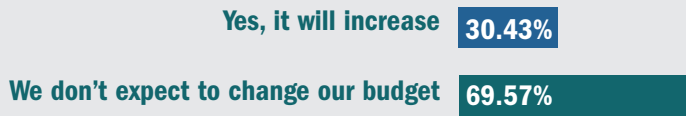
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How would you use influencers? (Check all that apply.)



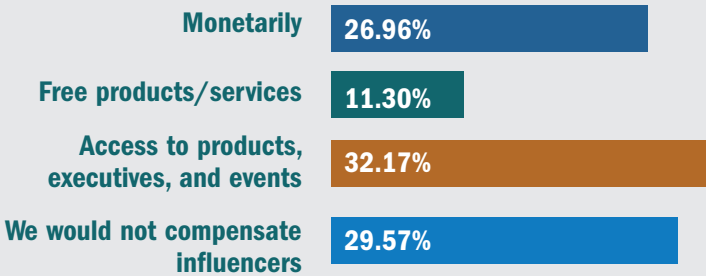
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In the coming year do you project your influencer budget will change?



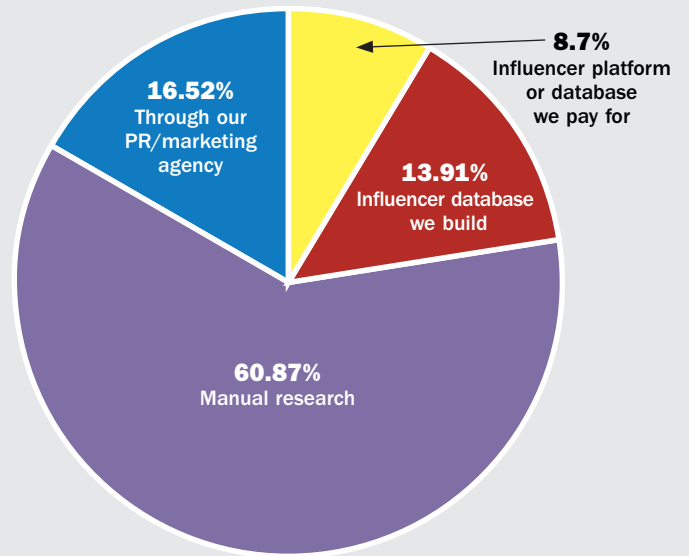
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How would you compensate influencers?



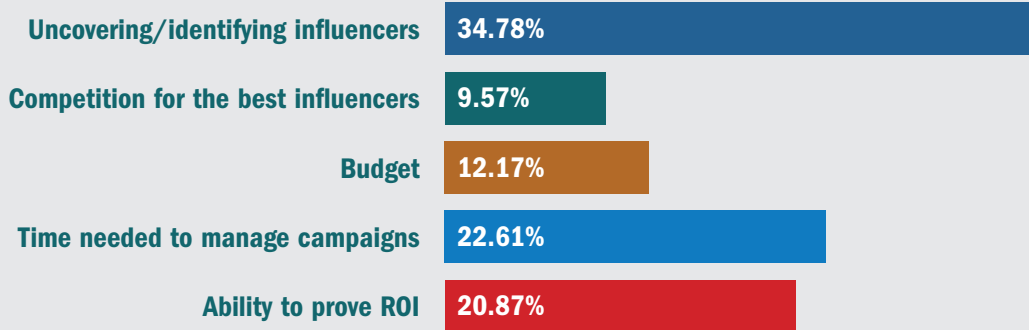
19

What is the primary way you would uncover/identify relevant influencers?



18

What is your biggest challenge with the rise of influencers in communications?



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