



UNSOCIAL MEDIA

EMBRACING UNSOCIAL METRICS: THE NEW WAY TO WIN AT INFLUENCER MARKETING

CONTENTS

**THE STATE OF INFLUENCER MARKETING,
2020 AND BEYOND**

EMBRACING THE UNSOCIAL IN 2021

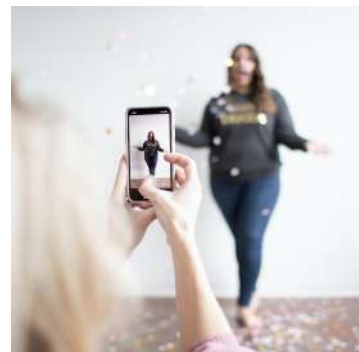
THE VALUE OF AUTHENTICITY

**PAID MEDIA; GUARANTEEING UNSOCIAL
PERFORMANCE**

**DATA, METRICS & OUR INTELLIGENCE
PARTNERS**

**THE INDUSTRY'S TAKE ON INFLUENCER
MARKETING SUCCESS IN 2021**

**A FINAL NOTE FROM US;
EMBRACING UNSOCIAL METRICS, THE 2021
WAY TO WIN AT INFLUENCER MARKETING**



"For a while now, we've been watching as the measurement of influencer marketing success moved from vanity metrics, such as likes and comments, to deeper social metrics such as saves, shares, clicks and content view duration. This year, success measurement was propelled even further, as advertisers shifted their focus to more meaningful ways of quantifying the success of their campaigns. I'm proud to bring you this report, filled with incredible insights from some of our industry's best minds; people who have already embraced the shift to unsocial media metrics. It will be those who use these new measurement tools to their advantage who will be the true winners in 2021."

Ben Jeffries, CEO, Influencer

"We're extremely pleased to bring some of the world's largest voices within the influencer marketing space to discuss the future marketing landscape, drawing insights from leading creators, advertisers and partners to track major shifts in the ways both advertisers and consumers are winning on social media."

Caspar Lee, CVO, Influencer

THE STATE OF INFLUENCER MARKETING, 2020 And Beyond

With so many changes to consumer behaviour, new platform innovations and a shift in the expectations audiences have on creators, the influencer marketing industry continued to redefine itself in 2020.

These developments are forcing brands to change how they view the success of their campaigns, with 'traditional' social metrics no longer providing an accurate measure of the success of influencer marketing - if they ever really did.

As we see it, social media is becoming *unsocial*.

With new tools like Facebook Pay, TikTok's Shopify partnership, Instagram Shops and InstaLive shopping badges, social media is further cementing itself as a highly engaging alternative to both online and in-store shopping. However, with the removal of traditional social metrics (such as likes and follower counts), brands need to adapt and find new ways to measure ROI.

Industry leaders have also been noting these shifts, such as **The American Influencer Council's founder Qianna Smith Bruneteau**, who said that "the creators who can drive purchase intent and generate real-time product excitement with live content will win in 2021." And we agree, both the creators and the social networks who'll win in 2021 will be those who adapt - platforms introducing new features, and creators embracing those changes and working them into their content.

Not only has Instagram added new features, but it's also changed its layout, making the engagement button smaller, more discreet and no longer sitting in the 'thumb zone'. These changes demonstrate that platforms like Facebook no longer place such significant value on these interactions. "Influence means driving an action - be it a change of mindset, a specific engagement, or web traffic and sales. Vanity metrics are on the way out and with that so too are 'influencers' who offer nothing but big numbers coupled with limited action." **Nik Speller, Strategy & Partnerships Director, Influencer.**



61%

of 18 to 34 year olds, have been swayed in their decision-making by creators.¹

73%

of advertisers expect to allocate budget to influencer marketing in 2021.²

87%

of consumers said they followed a brand, visited their website or made a purchase online after seeing a product on Instagram.³

LIKES AND HEARTS NO LONGER CUT IT

From follower numbers to social metrics, audience demographics to attributable sales, what constitutes success in influencer marketing has always been defined differently by different people across a wide range of industries - and often, even by different people within the same brand or agency.

Generally, the measure of success that's sought has been based on the specific goal of the key stakeholder leading the campaign, which is not always the key goal for the brand. For instance, a sales manager may look to generate product sales, while a brand manager aims to change perceptions; a PR manager might look to drive positive sentiment, while a campaign manager aims to deliver a set number of content assets.

In 2021, brands will start to define success metrics unique to their own product, industry, and the type of campaign they're running - essentially, they'll define success based on the

ultimate goal they're looking to achieve: impressions for awareness, comment sentiment or brand uplift for consideration, and sales for acquisition campaigns.

In order to achieve these more definitive, business-focused goals, brands will need access to data that goes beyond simple social metrics and provides an in-depth understanding of the performance of a campaign; whether that be sales, clicks, or brand uplift.

All of these measures of success can be legitimate business goals; however, for a brand to really succeed with influencer marketing they must first establish which of these *unsocial* measures pertains to their own measure of success - a measure that will be unique to their own position within the industry and geographies they operate in.



@EMMALOUISECONNOLLY, CREATOR

"I don't think the number of likes matters so much anymore. Not to me anyway. My algorithm is all over the place and the likes are never really a reflection of the views I have. My stories get an average of 140k views but my likes average on around 5k. Feels suspect. Or maybe they just genuinely don't like my photos. Who knows!!"



GEMMA GLOVER, INFLUENCER STRATEGIST, ENGINE UK

"For me influencers are your online best friend, they are honest, relatable, reliable and authentic. I think if anything the only change has been that people have relied on influencers EVEN MORE during 2020 - from at home food recipes, to fitness workouts, to home schooling the kids, to DIY hacks to book and TV series recommendations. They have been the new source of information."



@JORDHAMMOND, CREATOR

"Watching Netflix's 'The Social Dilemma' made me question my purpose on social media entirely. This led me to make sure that content that I put out there isn't just shared for the sake of it, and that there is actual value in the content I share."



CONTENT CURATORS SHOULD FOCUS ON METRICS THAT SHOW THEIR AUDIENCE IS FULLY ENGAGED AND SEES VALUE IN THE CONTENT THEY ARE POSTING. GROWING YOUR SHARE OF VOICE IN A VERY NOISY AND OVERCROWDED SPACE SHOWS THAT YOUR CONTENT HAS PURPOSE TO YOUR AUDIENCE.

**KIRSTEN OPENSHAW, HEAD OF DIGITAL
MEDIA & SOCIAL, WILLIAM HILL**



embracing the unsocial in 2021

The solution for success in this new world of *unsocial media* is identifying where your brand or business sits on a 'spectrum of success' and how influencer marketing can help you to achieve your key objectives, whether that's building brand awareness, attracting a new target market or facilitating lead generation.

This report aims to explore and unpack what success looks like for key opinion leaders across a range of brands, agencies, industries, and regions - and, importantly, how measuring success has changed in line with shifting platform features.

At Influencer, we've always been ready for the move to *unsocial media*, as we've never defined the success of our campaigns solely by social metrics and have worked hard to develop advanced ways of analysing the performance of our campaigns. The backbone and facilitator of contemporary success is no longer just the production of authentic, branded content by our creator community but the adaptability of measuring results in line with platform changes through our data partners - IBM Watson, Nielsen, Fifty.io, and Relative Insight.

In order to build an understanding of the full spectrum of success measurement, we asked creators and opinion leaders from global brands and agencies their thoughts. Alongside our market experience, their opinions have allowed us to plot the following aims, providing three key influencer marketing solutions and advising different industries where to focus their efforts to measure success now and into the future.

WE ASKED INDUSTRY EXPERTS WHAT INFLUENCER MARKETING SUCCESS WILL LOOK LIKE FOR THEM IN 2021

JENNINE MATTHIAS, SENIOR DIRECTOR INFLUENCER MARKETING, SAVAGE X FENTY

"Engagement and vanity metrics will continue to lose value as brands shift towards needing to see direct return on their investments. Engagement is still the best metric to help determine if the ROI will be there, but it can't be used to measure the success of a campaign or partnership."

CHRIS HARRISON, INDUSTRY HEAD - FINANCIAL TRADING AND EGAMING, GOOGLE

"Likes and views should never be the core to success, they are a micro metric and provide comparison points of reference. Creating great audience centric content should be the focus."

ANNA ANDERSON, SOCIAL TALENT DIRECTOR, CONDÉ NAST

"All metrics play an important part in judging the success of a campaign, as well as the quality of the content. We see ROI mainly being brand perception - we look for people that can elevate our clients' brands and we take this one step further by connecting these people to our trusted brands i.e Vogue. We pride ourselves on not treating influencers as a media channel but as CREATIVES with reach."

LAURR LETHBRIDGE-HALL, INFLUENCER MARKETING MANAGER, SHREDDY

"We are seeing a continued shift from vanity metrics, to more tangible, measurable metrics. We are of course looking at direct sales metrics, such as clicks and conversions, but are also starting to take a deeper dive into metrics that help us understand other elements of our extended audiences behaviours, including interactions with different sorts of story stickers, saves, sends, tagging of friends etc. In the end, these sort of metrics are what give us the clearest view of how these potential customers are feeling and what they are doing - allowing us to plan next steps in accordance to this."



A CREATOR'S ABILITY TO STAY CONNECTED AND BRING VALUE TO THEIR AUDIENCE IS GOING TO BE A KEY SOCIAL MEDIA TREND IN 2021. PEOPLE ARE TIRED OF CONSISTENT GIVEAWAYS AND 'ADS'. THEY WANT REAL LIFE, REAL PEOPLE, AND REAL ADVICE AND SUGGESTIONS.

AUNDREA ROSENBAUM, INFLUENCER & PUBLIC RELATIONS, DELL

2020'S CONSCIOUS CONSUMER AND THE VALUE OF AUTHENTICITY



Today, over half of 16 to 34-year-olds want creators to use their platforms to share their opinions and discuss current affairs; in line with this, the role of creators has been redefined, shifting from advertising advocates to storytellers, positioning brands as an authentic and natural part of their everyday life. 8

Of all the changes in influencer marketing this year, the push for authenticity and advocacy for important current affairs has been positive for both creators and consumers. This change has led to a rise in content engagement and a closer relationship between creators and their audiences who are increasingly making purchase decisions based on their values. **Creator, Patricia Bright** advises brands to involve creators from the beginning of a campaign to ensure unsocial media metrics are met and that authenticity is at the core of the partnership. **Sixteenth's Managing Director, Danny Lowney** also said, "all purchases will be more conscious - not just socially or environmentally, but from a value perspective. Is this purchase going to deliver me adequate value?"

From inclusivity to sustainable environmental practises, consumers are willing to shift their habits to purchase from brands and creators whose principles align with their own.

"True influencers, ones that rise to the top, will be those who have a distinct set of values. Those who truly understand what their brand is." **Luke Meadows, COO, Margravine Management.**

With values and authenticity coming to the forefront in influencer marketing campaigns, a further level of influencer vetting must be conducted to ensure creator and brand viewpoints are aligned.

90% of marketers say proving authenticity is critical to the future of influencer marketing for their brands. 1 Therefore, as **PHD's Head of Social, Ollie Richardson** said, building relationships with creators through ambassador programmes and long-term partnerships will prove far more important in 2021, moving away from "fleeting relationships" and transactional one-off campaigns typically seen in our industry.

Our recent campaign with KerryGold butter saw a six month long collaboration between the brand and Bake Off's Benjamina Ebuehi build a meaningful and authentic story. The campaign produced 373,000 impressions across 34 pieces of content; this genuine creator endorsement is far more persuasive to her audience than a simple one off brand deal.

3 out of 4

GLOBAL CONSUMERS WANT BRANDS TO
CAPTURE TRUE LIFESTYLE AND CULTURE

4

71% OF ALL
CREATORS

AGREED THAT HONEST AND AUTHENTIC
CONTENT KEEPS THEIR AUDIENCE ENGAGED

5

Over half

GEN Z SHOPPERS

ABANDONED A PURCHASE BECAUSE
IT DIDN'T REFLECT THEIR VALUES

6

Over
65%

WOULD PAY MORE FROM BUSINESSES THAT
ARE SUSTAINABLE OR VOCAL ABOUT
FURTHERING EQUALITY AND DIVERSITY

6

37%

OF CONSUMERS VALUE GREATER
AUTHENTICITY IN RECENT CONTENT

7





CHRIS STOKEL-WALKER, JOURNALIST

"Influence is increasingly becoming more than just being popular: it's reflecting society and the issues around it."

ZOE CROOK, HEAD OF INFLUENCER MARKETING, FCB INFERNO

"As consumers call for genuine, meaningful communications, purpose-driven marketing has never been more important to allow brands to cater to the desires of their audiences. With consumers loudly boycotting brands that remain silent, the importance of engaging in social conversations has never been more prominent."

VICTORIA USHER, CEO, GINGERMAY

"Brands need to continue with their dialogue with individuals of all ages because it's not just under 25s but also the older generations that are being moved to action by issues such as the environment."

@SUPERCARBLONDIE, CREATOR

"The questions you should always ask yourself is - am I providing value to my fans and am I providing value to the client. If the answer is yes then it's a perfect fit."



HOW THE PUSH FOR AUTHENTICITY HAS SHAPED CREATOR CONTENT

Over the past year, the type of content delivered by creators has also adapted to better achieve authentic storytelling. Rather than traditional product placement, the creators we work with have become experts at showing products as a genuine integration in their daily life, painting a more honest and relatable brand story. Gemma Glover, Influencer Strategist at Engine said, "During 2020, it was key to use influencers as a source of support, inspiration and guidance – we noticed less product focused and more lighthearted content and 'how to' videos performed much better."

Video content allows for easy step-by-step guides, Q&As and product reviews, all of which have gained staggering popularity through 2020, adopted by beauty, fitness and lifestyle creators across all platforms. With 44% of consumers more likely to buy a product after viewing it in a video and 80% of millennials going to video content to research a purchase decision, short form video content will be key to driving influencer marketing success in 2021.⁵ As consumers say video ads are the #1 way they discover new brands to purchase from, it's little surprise that Gymshark Global Partnerships Director, Calum Watson, thinks that "TikTok will commercialise big time and see more brands invest in it in 2021."

Did you know: IGTV videos appear four times larger than photos in Instagram's explore tab, encouraging views and engagement from a broader audience.

93%

OF BRANDS GOT A NEW CUSTOMER BECAUSE OF A VIDEO ON SOCIAL MEDIA

9

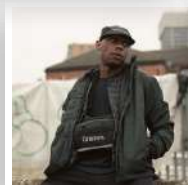
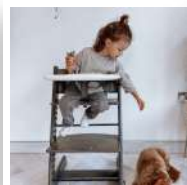
60 MILLION

PEOPLE TUNED INTO SHOPPING LIVE STREAMS IN MARCH 2020

10

BRANDS' VIDEO ASSETS REPORTEDLY DRIVE AN 11% HIGHER CONVERSION RATE AND 2-3X HIGHER CLICK-THROUGH RATE COMPARED TO STATIC IMAGERY

11



@JAMIE_RAWSTHORNE, CREATOR

"The more authentic anyone is with their platform the stronger their relationship will be with their audience. If you have a good relationship with your audience, they're happy to see you win and make money!"

ADESUWA AJAYI, FOUNDER, @INFLUENCERPAYGAP

"An authentic collaboration in 2021 looks less like ticking boxes and more like moving towards gaining a greater understanding of creators and their needs"

@EMMALOUISECONNOLLY, CREATOR

"It's important that the brands I work with I actually use, love and would recommend to a friend. If I wouldn't recommend a product to my Mum or best friend, I won't work on it"

IF 2020 HAS SHOWN US ANYTHING, PURPOSE IS REAL INFLUENCE.

INDIVIDUALS WHO LEVERAGED THEIR PLATFORM IN IMPORTANT AND PROVOCATIVE WAYS WON THE HEARTS OF MANY. THEY FOUGHT FOR GEORGE FLOYD AND BREONNA TAYLOR (AND CONTINUE TO DO SO), THEY SUPPORTED THOSE AFFECTED BY THE PANDEMIC AND THEY SPOKE UP ABOUT SOCIAL ISSUES AND CLIMATE CHANGE. THEIR CONTENT CENTRED AROUND THEIR BELIEF SYSTEMS, AND THEIR AUDIENCES VALUED IT.

BECKY OWEN, BRANDED CONTENT EMEA, FACEBOOK

WE ASKED INDUSTRY LEADERS WHETHER THEY THOUGHT PAID MEDIA WOULD BE A KEY COMPONENT TO DELIVERING SUCCESS IN 2021

KIRSTEN OPENSAP, HEAD OF DIGITAL MEDIA & SOCIAL, WILLIAM HILL

"An influencers' organic efforts have a short life span, it is also hard to measure and has limitations in terms of reach and traffic. An amplified paid media strategy will ensure the longevity of the post and support the organic content."

JOEL WILLIAMS, PERFORMANCE & BRANDING PARTNERSHIPS MANAGER, GLOBAL BUSINESS SOLUTIONS, TIKTOK

"We have recently launched Boosted TikTok, a native format that boosts your existing TikTok posts and Creator made TikToks within the popular For You feed. This leads to increased awareness and engagement in a natural way with authentic content, to reach your audience at scale, available across flexible buy types and objectives. Through native experiences, Boosted TikToks capitalise on natural user behaviour and consumption habits, making the ad more trustworthy and driving engagement at scale."

BECKY OWEN, BRANDED CONTENT EMEA, FACEBOOK

"In our research, we've seen the power of influencer generated content used in paid media. Time and time again, this content drives significant results for brands, such as incremental lift across the whole purchase funnel, but notably lower-funnel outcomes. Brands are starting to focus on DR more and more, so it makes sense that paid will be a key practice."

JAMES CONNELLY, CO-FOUNDER, FETCH

"If influencer content outperforms advertising content (which invariably it does), smarter brands will cotton on to the strategy of using their paid media to drive volume to their influencer content, not their ad content."



54% OF
MARKETERS BELIEVE
THAT SOCIAL MEDIA
PLATFORMS ARE THE
BEST PLACE FOR
RETARGETING ADS

12

1/3 OF ALL
GENERATIONS SAY
THEY DISCOVER
BRANDS THROUGH
ADS SEEN ON
SOCIAL MEDIA

7

THE AVERAGE COST-PER-CLICK (CPC)
IN THE MARKETING INDUSTRY IS £2.47

Ours is £0.20

9



PAID MEDIA

GUARANTEEING UNSOCIAL PERFORMANCE

Where authenticity builds brand rapport between consumers, creators and your brand, paid media is the key to ensuring attribution and making your campaign more impactful.

If your goals have a specific numerical target based on building brand awareness, boosting consideration or pushing conversions, a paid media approach makes your organic influencer campaign highly targeted, putting your campaign content onto the screens of a staggering 3.96 billion consumers across social media, targeted based on their age, location, interests, passions or stage of life. ¹

Maya Jundi, Head of Paid Media at Influencer said, “through paid media’s tracking and targeting, the industry will be revolutionised, tapping into creator audiences like never before.”

In fact, we’ve already seen this happening with 38% of our campaigns in Q4 2020 using an element of paid media distribution to amplify their influencer content. Our specialist paid media strategies guarantee your brand results, providing you with new deliverables by which to measure success - ones that combat the *unsocial* and transcend traditional social metrics.

With advertising budgets fluctuating, partnering paid media with organic influencer marketing is a firm method for achieving most definitions of success, and more importantly, measuring it. Paid media focuses on reducing wastage, allowing brand’s to prove the success of their influencer marketing strategy and guaranteeing that a target return on investment is met. In short, combining paid media and influencer marketing provides a stronger value proposition for brands, and for agencies.



IAN SHEPHERD, CEO, THE SOCIAL STORE

"Our goal is ultimately retail sales, so our campaigns and activity are all measured by sales. Therefore success would be increased conversion. With the rapid growth in new social commerce functionality we are expecting digital talent to have even greater influence in retail sales."

AUNDREA ROSENBAUM, INFLUENCER & PUBLIC RELATIONS, DELL

"There will always be a place for paid media, I feel like the definition of paid media is what is changing. What you are paying for and how you use that is what is going to be different in 2021."



"2021 will see the influencer industry shift from a predominantly PR and brand-driven channel to a more sophisticated performance-driven channel, primarily focusing on reach and attribution. At MediaCom, we have found that more and more clients are requesting for influencer content to be amplified with paid media, so I think we'll start to see branded content ads shown a lot more frequently in our feeds. I'm really excited for this shift to happen so we can start to move away from the "what" in influencer marketing and into the "how". For example, how to make it work most efficiently for your brand. Creative analytics will be integral here to understanding what content and methodology is working best for brands across different sectors, shaping out pathways for best practice in influencer marketing in 2021."

**EMILY TRENOUTH, HEAD OF INFLUENCER
MARKETING, MEDIACOM**



DATA AND METRICS

HOW OUR INTELLIGENCE PARTNERS CAN HELP YOU DECIPHER SUCCESS

The value of in-depth data and post-campaign analysis moves to the fore as vanity metrics such as likes become less meaningful. Only 27% of marketers are effectively tracking content metrics, and while some brands are beginning to understand the importance of the shift to the *unsocial*, finding the data and being able to decipher it becomes somewhat of a challenge.¹³ Concise and comparable measures of success across industries, campaigns and platforms are becoming increasingly difficult as vanity metrics become less of a focus.

At Influencer, we're able to measure content impact and creator authenticity by partnering with a range of platforms, data providers, and research agencies - IBM Watson, Relative Insight, Fifty.co and Nielsen, to name a few.

Through their offerings - many developed in partnership with us, to offer unique insights, specific to influencer marketing - we can extract qualitative measures, analysing comment analysis, audience perceptions and content impact. Together with a stronger Facebook partnership, the paid media amplifications we run across their platforms can also be measured for brand uplift; better understanding consumer responses to campaign content.

All of these *unsocial*, less quantitative measures of data far better define campaign success than a save or share ever could.

Our partnerships with these key research companies allows us to turn a hugely qualitative assessment into quantitative measures, giving authentic collaborations a number and value that can be easily assessed and compared in their 'success'.

One of the most important ways to continually improve the success of influencer marketing into 2021, is to better understand your audience. IBM Watson allows us to analyse an audience's wants, needs, and consumption preferences; while our partners at Fifty.co determine the 'tribes' that follow brands, content creators, or other organisations - and then analyse both how they describe themselves online and explore the other interests those tribes have.

"For us, our campaigns success has moved significantly from being solely metric led to being outcome led, delivering tangible results."

Nik Speller, Strategy & Partnerships Director, Influencer



Embracing the unsocial. **THE INDUSTRY'S TAKE ON SUCCESS IN 2021**

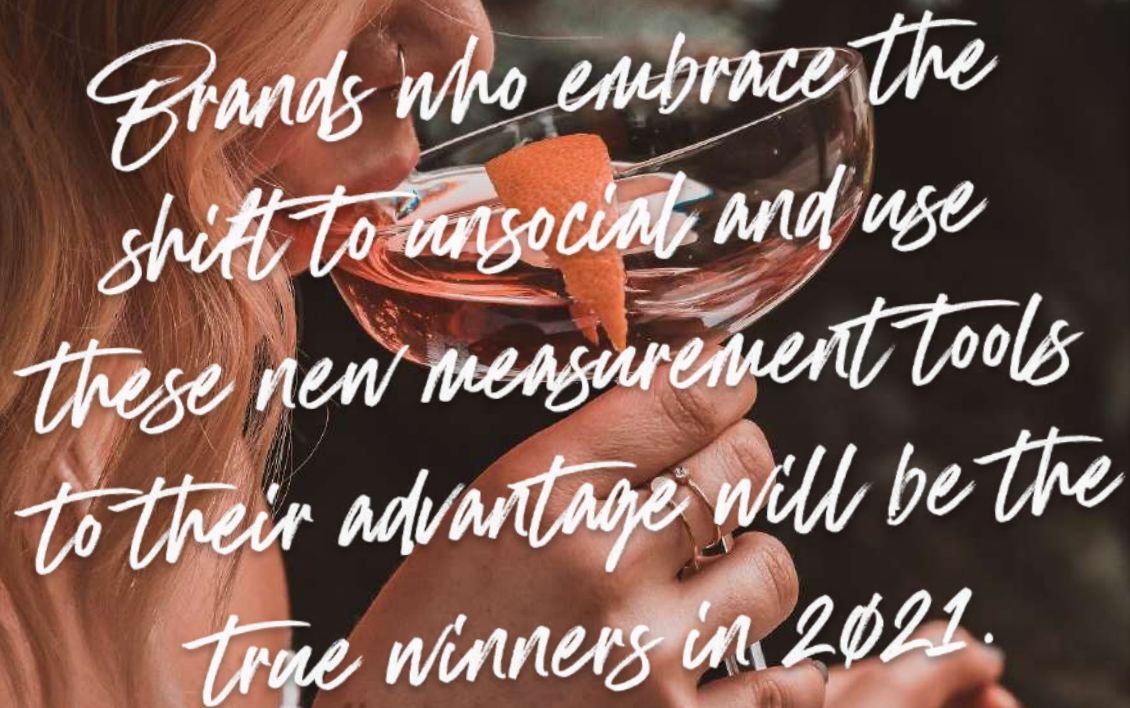
As we've heard from our industry opinion makers, judging and defining success is, and will continue to be, different for every brand, agency and industry. What we have seen emerge however, is the importance of sentiment in influencer marketing content and the value of cultivating meaningful relationships between brands and consumers. **Gymshark's Global Partnerships Director, Calum Watson**, summarised this sentiment perfectly; "Now more than ever, the most important focus for a brand in terms of measuring success should be around how the brand is viewed in the eyes of the consumer and how strong is that relationship between the brand and the consumer."

Rupa Shah, founder of Hashtag Ad Consulting said, "2020 has opened up a Pandora's box of questions relating to diversity and equality and those issues will remain just as relevant for 2021." And Rupa's concern for the growing importance of creators taking a stance on social issues and playing a role in shaping the future of the industry is shared across our interviewees, particularly by **Catalyst's Co-Founder & CCO George Gazzard**, who emphasised the growing role creators need to play in "providing positive value to communities and generating a bond of trust" through creator-brand partnerships. In 2020, this has only become even more apt, a trend both we and our industry experts see continuing into 2021.

A woman with dark hair and tattoos on her arms is leaning over a white railing, looking down. The background shows a body of water and a distant shoreline under a blue sky.

*"The most important focus
for a brand in terms of
measuring success should
be around how the brand is
viewed in the eyes
of the consumer"*

- Calum Watson

A close-up, profile view of a woman with long, wavy brown hair holding a glass of orange juice. A slice of orange is perched on the rim of the glass. The background is blurred, suggesting an outdoor setting.

*Brands who embrace the
shift to unsocial and use
these new measurement tools
to their advantage will be the
true winners in 2021.*

And here's our take on it
**THE 2021 WAY TO WIN AT
INFLUENCER MARKETING**

Though some may not yet see it as *unsocial*, brands and industry experts are beginning to recognise the demise of traditional social media metrics and we hope this report has helped to identify some more meaningful and powerful ways to judge the success of your influencer marketing campaigns.

As our experts have shared, brand perception and the value placed on creators by consumers is an unsocial deliverable that will continue to grow in importance in the new year. A sentiment that is not only shared by our team, but brought to life in our campaigns. So many new brands and businesses were born in 2020, so seeing if they can stick it out next year will be the ultimate challenge.

For us, a brand's best hope for trust, longevity and growth through the new year is building meaningful and powerful relationships with their consumers through creators. As we see it, the success of these relationships will be evaluated based on memorability and resilience, two totally unsocial metrics best measured through the three solutions outlined in this report.

Brands who embrace the shift to unsocial and use these new measurement tools to their advantage will be the true winners in 2021.

Thank You!

WE LOOK FORWARD TO
MAKING WAVES TOGETHER

contact@influencer.com