

Consumer Research:

THE PSYCHOLOGY OF FOLLOWING

Olapic

INTRODUCTION

Social media influencers seem to wield a lot of power over their followers, but how does this influence actually impact brand marketing and consumer behavior? Our study, the Psychology of Following, seeks to answer this question and more, to give marketers insight into how and where they can use influencer marketing to build a bigger audience.

Our main finding was hardly surprising: authenticity is the number one reason why people trust an influencer's endorsements. Most consumers seem to be aware that some influencers are paid to promote products, but that doesn't necessarily deter their likelihood to trust an influencer or make a purchase based on one's a post.

Of course, there are several facets to our findings, which vary by demographic. We surveyed 4,000 people aged 16 to 61 in the U.S., UK, France, and Germany, so we're confident that our conclusions will have meaningful relevance to businesses in these markets and beyond. The Psychology of Following uncovers the attitudes, behaviors, trust signals, and preferences that marketers need to know in order to find successful influencers for their brands.



TOP FINDINGS

Most survey respondents defined an influencer as someone who has a lot of followers and gets paid by brands to endorse products. But, what constitutes “a lot of followers?” That answer isn’t as simple. Those surveyed seemed to agree that 10K or more is what determines influencer status.

Additionally, influencers are most likely to engage their followers on Facebook, YouTube, or Instagram, and

videos with sound appear to be the most popular type of content. The youngest group of respondents showed a strong preference for Instagram, followed closely by YouTube and then Snapchat. Videos with sound and still images are the most popular types of content, while influencers may find little engagement in stories on their social profiles. Unsurprisingly, older cohorts were most likely to sidestep the whole influencer trend altogether.

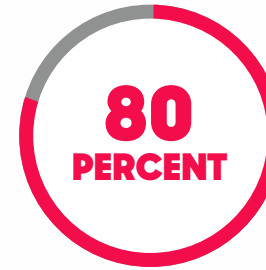
WHILE INFLUENCERS MAY SPEND A LOT OF TIME AND EVEN MONEY CREATING EYE-CATCHING VISUALS AND ENGAGING AUDIO, THE QUALITY OF CONTENT ISN'T WHAT DEFINES THEM - THOUGH IT LIKELY CONTRIBUTES.

Across most platforms, people seem to be most interested in following influencers that promote a certain lifestyle, rather than a specific category of products or activity. This makes sense given that authenticity is a big reason behind why people trust influencers. If influencers promoted only one type of product, instead of products within a contextual lifestyle, the authenticity factor wouldn't exist.

For marketers, one of the most significant takeaways from this survey is that nearly half of respondents reported that they considered making a purchase after seeing an endorsement by an influencer. Plus, nearly one-third said they have bought a product based on an influencer's post. This effect is most prominent in the U.S. and among younger generations.



of respondents reported looking for content on food and recipes

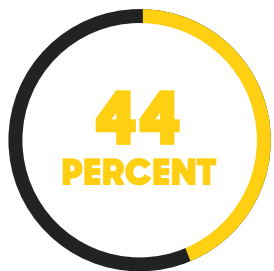


of people ages 16-18 follow a fashion influencer on Instagram

AGE GROUP BREAKDOWNS 16-24

The youngest cohort – Generation Z and younger Millennials – is significantly more likely than older respondents to follow influencers on social media, with beauty and fashion as their favored categories. They're not as likely to follow travel or lifestyle influencers, and when they do follow food influencers, they're looking more for inspiration than anything.

The under-25 crowd also seems to be more affected by influencer endorsements, with about 44 percent responding that they've purchased or considered a product after seeing an influencer's post. Also, while those on the younger end favor video with sound, the more mature among this cohort is more likely than any other age group to prefer still images.



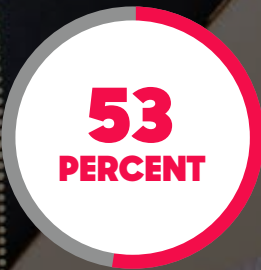
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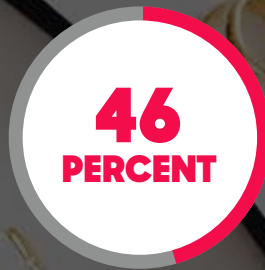
For brands, the main takeaway is that younger people look to influencers to stay up to date on evolving industries like fashion and beauty. Staying on-trend is valuable social currency for younger generations, so influencers who are always on the cutting edge are most likely to make an impact on this age group.

Plus, Gen Z and Millennials don't just want to be ahead of the curve in beauty and fashion, they also want to set trends in social media usage. This group uses Instagram (53 percent), YouTube (46 percent), and Snapchat (27 percent) at higher rates than any other cohort. This suggests that brands may find untapped audiences in lesser-known platforms and earn cred among tech-savvy groups.

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INSTAGRAM



YOUTUBE



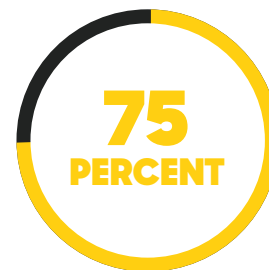
SNAPCHAT



AGE GROUP BREAKDOWNS 25-44

The middle cohort consists of Millennials and Generation X, and while they're not as enthralled with influencers as the younger group (45 percent of those 35-44 do not follow any influencers), their responses indicate some opportunities for brands.

Older Millennials and Gen-Xers are more likely to be on Facebook than any other platform, suggesting more traditional social media use – i.e. they value a helpful, educational network over a feed loaded with fleeting trends. That said, the Millennials among this cohort are still likely (75 percent) to follow a fashion influencer on Instagram, making this a viable platform for apparel brands.



of Millennials follow a fashion influencer on Instagram, making this a viable platform for apparel brands

Additionally, one interesting finding regarding this group is that they're more likely than other respondents to give influencers feedback. The younger set is apt to post a photo or response that either reinforces or negates an influencer's endorsement, while Gen-Xers prefer only positive interactions.

Brands that want to reach this cohort, which includes everyone from recent college grads to parents and homeowners, may want to look for influencers who provide evergreen advice and information on life skills. That's not to say this group doesn't care about glittery winged eyeliner, but they'd probably prefer to get recipes or travel advice.



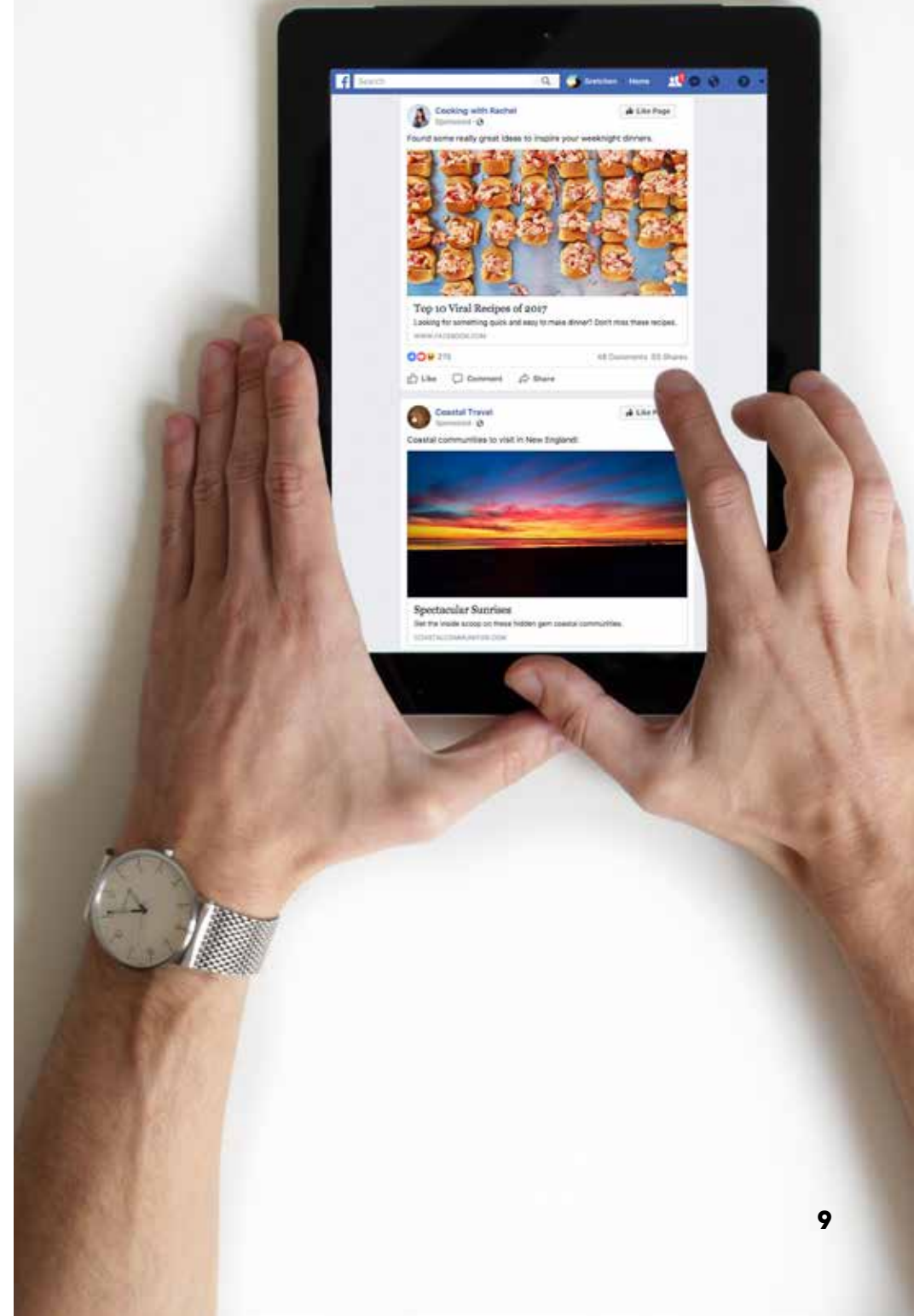
AGE GROUP BREAKDOWNS 45-61

When older Gen-Xers and Baby Boomers were surveyed, they were more likely than younger cohorts to not follow any influencers – as well as not know what an influencer is, exactly. But they're far from clueless.

Rather, this group is skeptical about social media influencers and values authenticity above all other qualities (though this finding was consistent among all ages), particularly when it comes to health and fitness. They're least likely to follow beauty or fashion influencers, and mostly follow food and recipe accounts to look for inspiration.

The skeptical attitude of this group toward social media suggest that brands should seek out influencers with a good reputation who provide evidence-based information on evergreen topics like cooking and nutrition.

Low engagement among the 45-plus crowd doesn't mean brands shouldn't bother, it means that they must choose wisely and create or foster high-quality content, and promote it on more traditional platforms like Facebook.



COUNTRY SUMMARIES

UNITED STATES

Across all platforms and age groups, Americans are most likely to follow an influencer on social media and be influenced to make a purchase based on an influencer's endorsement. This likely stems from Americans' view of influencers not just as paid promoters, but experts.

More than 45 percent said influencers share more information than regular users and even define them as experts in their niche. When seeking influencers in travel, beauty, and food, Americans tend to value informative or educational content more than other countries, while they want inspiration from lifestyle influencers.

Some 43 percent of U.S. respondents follow influencers on Facebook, while 32 percent follow on Instagram and 29 percent follow on YouTube. Twitter, Snapchat, Pinterest, Tumblr, and LinkedIn are respective runners-up. Lifestyle influencers are found on most channels, while Facebook, YouTube, and Pinterest are most popular for following food and recipe niches, leaving Instagram as the platform of choice for those that are more fashion-focused.

Marketers have a growing opportunity to reach American markets by promoting their products through influencers, but it's important to remember that authenticity and the quality of information will be key to standing out in the crowd. Just 30 percent of respondents said they don't follow an influencer, suggesting that influencers have become a popular form of third-party validation in the U.S.



COUNTRY SUMMARIES

UNITED KINGDOM

Similar to the U.S., people in the UK tend to see social media influencers as niche experts and may be easily swayed into a purchase by influencer endorsements. One interesting difference between Americans and Brits, however, is that the latter is much more likely to define an influencer as someone who gets paid to promote a product.

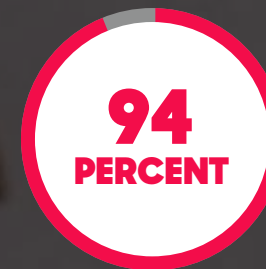
Some 45 percent of UK respondents said influencers are paid product promoters, compared to just 35 percent of Americans. Plus, they were the least likely among all countries to say they do not trust influencers' recommendations. This suggests that Brits may be more trusting of advertisements than American cohorts. But they also value authenticity foremost when deciding whether they trust an endorsement, so content still needs to be high-quality.

Perhaps one reason why participants in the UK are more trusting is that they look to influencers for inspiration, rather than information. When it comes to travel, beauty, fashion, health, and homeware influencers, Brits were more likely than most other countries to say they follow to find inspiration. Eighty percent said they follow beauty influencers on Snapchat, while 94 percent said they find food and recipe inspiration on Pinterest.

Marketers may consider looking for influencers that are models in their niches, as opposed to educators, to give UK audiences the inspiration they want. But as with all groups in this study, authenticity is important, so seek people who live by the mantras they sell.



said they follow beauty influencers on Snapchat



said they find food and recipe inspiration on Pinterest

COUNTRY SUMMARIES

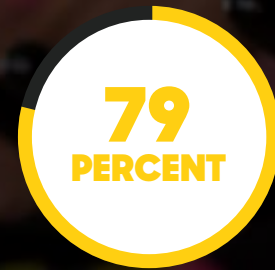
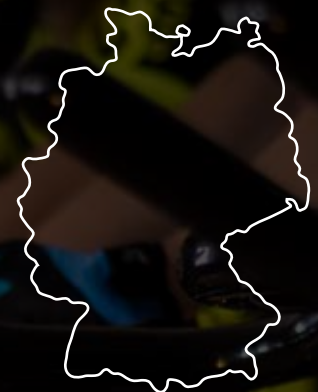
GERMANY

Perhaps unsurprisingly, German respondents were most likely to view influencers as people who get free products and post staged photos, and less liable to define them as experts. Plus, 34 percent of Germans don't even consider a person an influencer unless they have at least 50K followers, compared to a 10K threshold for other countries.

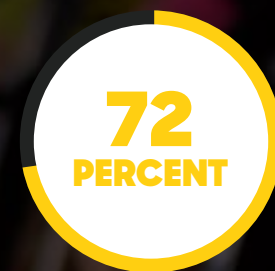
It seems the German market may be tough for influencers, but 79 percent reported following a beauty influencer on Snapchat, while 72 percent follow fashion influencers on Instagram, 67 percent follow fitness influencers on Facebook, and 79 percent find food inspiration and recipes on Pinterest.

Plus, nearly one-third of German respondents said they've made a purchase because of an influencer endorsement and 38 percent have considered doing so. While social media use among Germans isn't as widespread or as consistent as it is in the U.S. or UK, there are still opportunities for brands to find a bigger audience in this market with influencers.

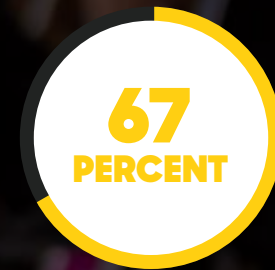
Germans were more likely than other nationalities to say expertise is the main reason why they would trust an influencer, so credibility and reputation are of utmost importance when choosing brand ambassadors.



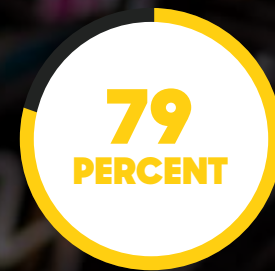
reported following a beauty influencer on Snapchat



follow fashion influencers on Instagram



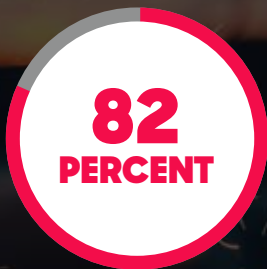
follow fitness influencers on Facebook



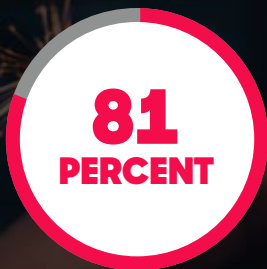
find food inspiration and recipes on Pinterest



“The French reported a preference for still images over videos with audio, while the other countries surveyed specified liking the opposite.”



look to Pinterest for beauty influencers



go on Snapchat for lifestyle inspiration

COUNTRY SUMMARIES

FRANCE

While some French respondents reported using social media to follow influencers in beauty, fashion, food, and lifestyles, 47 percent said they do not follow any influencers on social media. Plus, 23 percent said they have never made a purchase due to an endorsement – more than any other country.

In addition, the French were less likely than any other nation to name authenticity or expertise as main drivers of trust. Seven percent said they do not trust influencers’ posts, and many said that influencers are paid to endorse products and often stage their photos or videos.

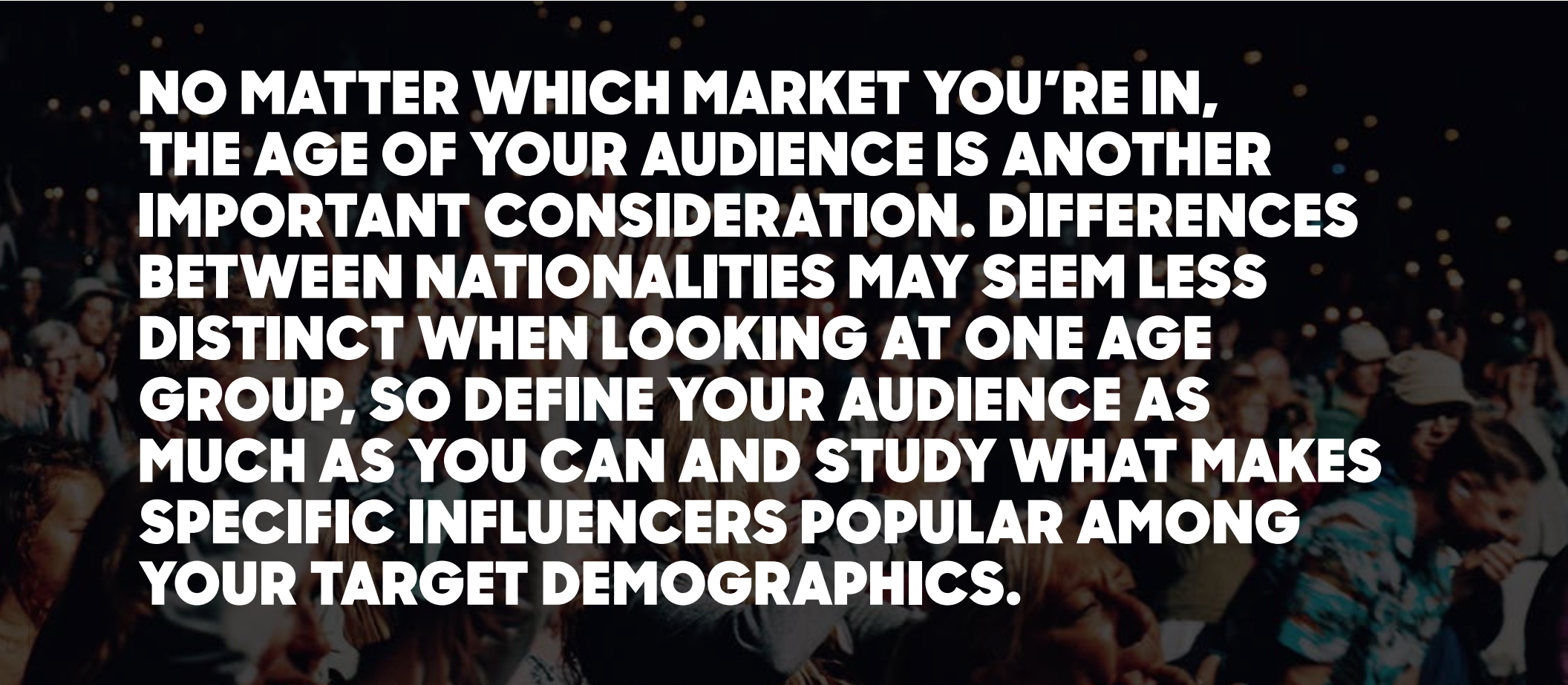
Another stand-out finding was that the French reported preference for still images (30 percent) over videos with audio (25 percent), while every other country said they prefer the latter by far.

The French market may be the most nuanced to affect with influencer marketing, but among those who do follow influencers, 82 percent look to Pinterest for beauty influencers and 81 percent go on Snapchat for lifestyle inspiration. Targeting social media users in France may take concerted effort, and marketers may need to look at successful influencers in their niche to find what works for their audience.

GLOBAL COMPARATIVE

Respondents from the U.S. and the UK showed similar warm attitudes and trusting behaviors when it came to influencers, suggesting that these markets may be more effective areas for this type of marketing. Audiences that are savvier with social media will naturally have higher usage, so marketers have room to experiment and stay ahead of trends.

Meanwhile, the French and German respondents tended to align in their answers, showing lower levels of trust and engagement with social media influencers. On the surface, this suggests less opportunity, but what it really means for businesses is that they need to try harder to find reputable and relatable ambassadors.



**NO MATTER WHICH MARKET YOU'RE IN,
THE AGE OF YOUR AUDIENCE IS ANOTHER
IMPORTANT CONSIDERATION. DIFFERENCES
BETWEEN NATIONALITIES MAY SEEM LESS
DISTINCT WHEN LOOKING AT ONE AGE
GROUP, SO DEFINE YOUR AUDIENCE AS
MUCH AS YOU CAN AND STUDY WHAT MAKES
SPECIFIC INFLUENCERS POPULAR AMONG
YOUR TARGET DEMOGRAPHICS.**

METHODOLOGY

Working with CITE Research, Olapic sought to define what an influencer is, why people follow influencers, what makes them trustworthy, how they impact purchase behavior, and which type of content is preferred. We surveyed 4,000 people online in the U.S., UK, France, and Germany from Nov. 13, 2017 to Nov. 21, 2017. Respondents were aged 16 to 61 and all were social media users.

ABOUT OLAPIC

Olapic is an innovator in visual content solutions. From pioneering the first visual earned content platform to creating unique, on-brand visual content formats for use across all consumer touchpoints, Olapic helps drive brand engagement and performance, at scale, for hundreds of the world's top brands. An official member of Facebook Marketing Partner program, Instagram Partner program and Pinterest Partners, Olapic is headquartered in New York City with offices in New York, Los Angeles, London, Paris, Berlin, Hong Kong, Tokyo, and Córdoba.

For more information on Olapic, visit www.olapic.com.

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