



## ***Top 20 Influencer Audit by Vertical***

MARCH 2019

# METHODOLOGY

## Criteria for Evaluating the Top 20 Influencers by Vertical

*Influential* created a composite score that combined: (1) influencer mention volume within a particular vertical, (2) channel engagement rate, (3) new follower growth rate, (4) OMD I-Score, and (5) sentiment values around the influencer, as expressed by their followers. The composite score for each influencer is then compared to the competitor average across each vertical. The influencers with higher multipliers above the verticalized benchmarks made the list.

### INFLUENCER MENTION VOLUME

Number of times an influencer has been mentioned within a particular vertical in the last year.

### INFLUENCER SENTIMENT INDEX

The positive, neutral, and negative sentiment expressed from followers around the influencer.

### NEW FOLLOWER GROWTH RATE

Calculates the volume and velocity in which the influencer's channel has grown in the last year, in terms of net new followers.

### OMD I-SCORE RATING

Accounts for demographic, contextual, psychographic, brand safety, and bot scores on the influencer's individual channels.

### CHANNEL ENGAGEMENT RATE

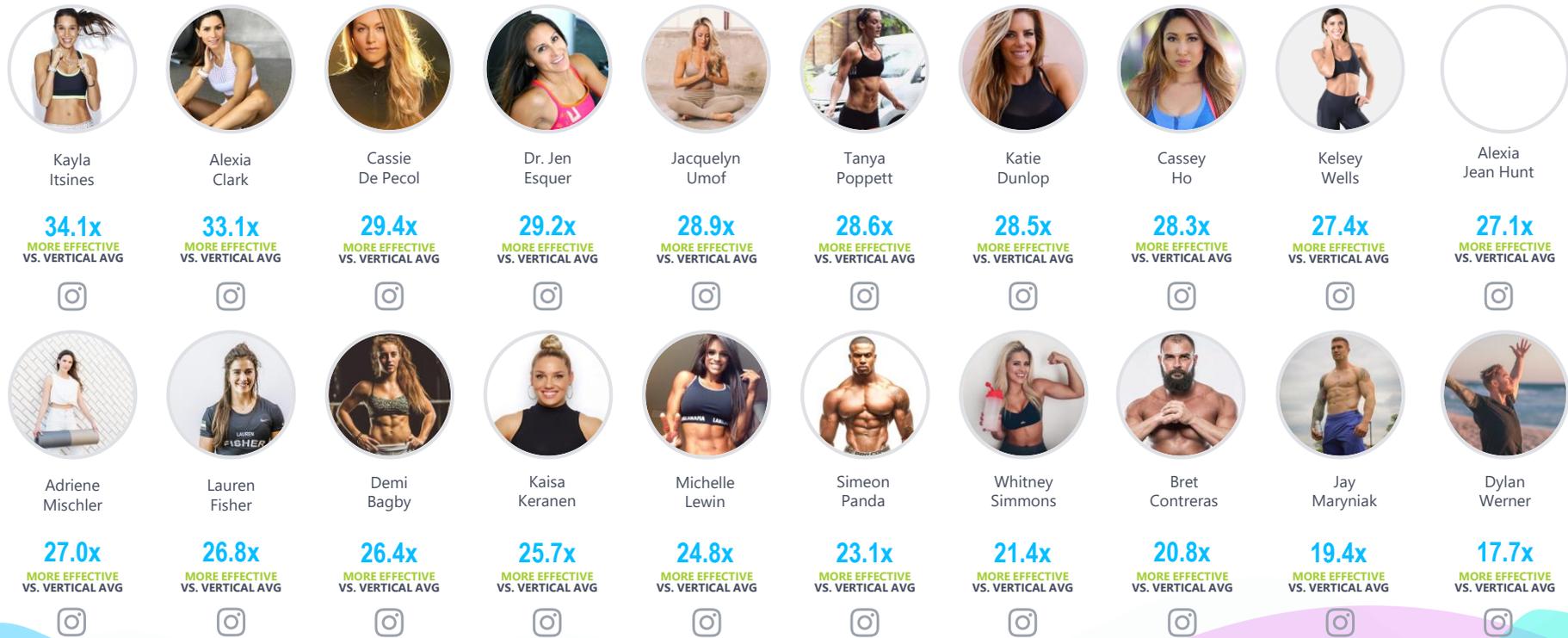
Represents the overall average engagement per post divided by the total followers on the day of the post. Posts in the last year were examined individually and then averaged.

# Vertical: Fitness

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Fitness Vertical:

- Instagram emerged as the top platform for fitness in comparison to Facebook, Twitter, and YouTube based on the visual nature of the platform and bite-sized content. Additionally, users are spending more time on Instagram and thus engaging more with fitness content over other platforms.
- The majority of the top 20 influencers who made the list have dedicated fitness programs that live on their owned websites, outside social. They have built a reputation that exists outside of social and have driven fitness results for their respective audiences.
- In addition to fitness, these influencers have authentically shared their struggles around fitness and lifestyle. The honesty and truth behind their stories has inspired communities to engage with their content.



## How Influencers in this Vertical are Effective at Driving Success for Brands

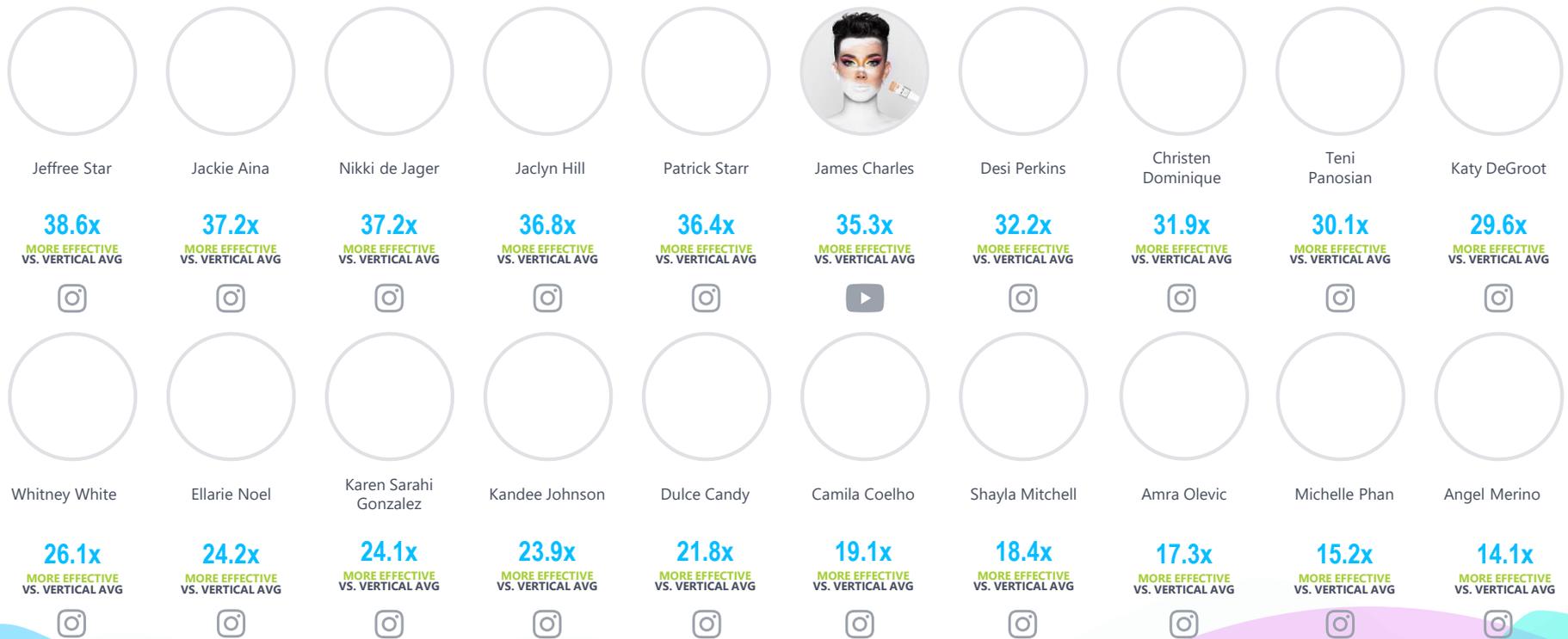
Giveaways are a big driver for engagement, product and/or service usage intent, and positive sentiment in this category. Content that incorporates a giveaway from brands demonstrates a +97% increase in comments where followers organically advocate for the brand teaming up with the influencer versus just participating in the giveaway and/or commenting on the influencer's post.

# Vertical: Beauty

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Beauty Vertical:

- Although YouTube has historically been known as the “go-to” platform for Beauty influencers, users in terms of views, engagement volume, and engagement rate are interacting with influencers +24% more on Instagram. Note that the majority of the top 20 influencers also have their YouTube channel. Influencers are using their Instagram to reference “longer-form” content on YouTube.
- There are two primary categories of beauty influencers - one where content is more aesthetic and aspirational, and the other type of influencer where content is more practical (i.e. DIY, product reviews, tutorials, etc.). Influencers with a more aspirational appeal typically partner with more “premium” and “luxury” beauty brands such as Chanel and Givenchy and have a +46% more likelihood to drive engagement over “practical” beauty influencers who incorporates a “luxury” product into their content.



## How Influencers in this Vertical are Effective at Driving Success for Brands

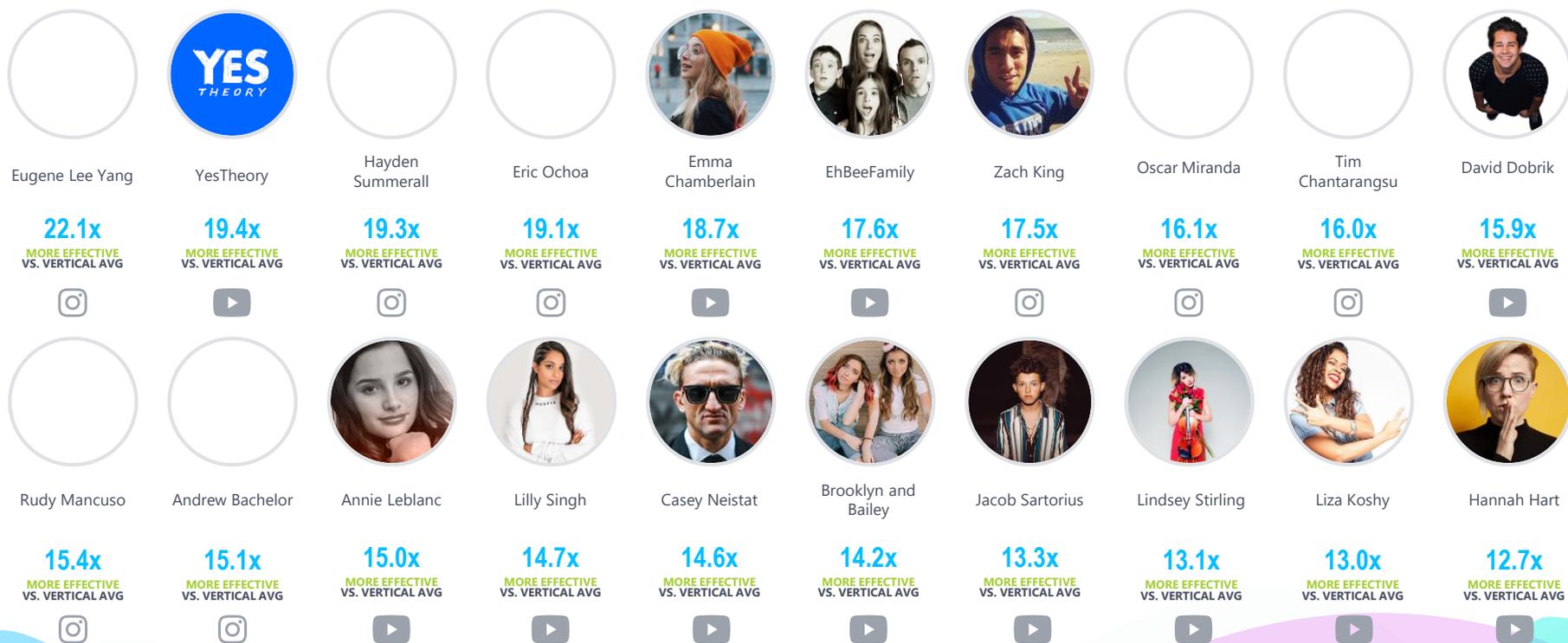
In addition to content that demonstrates an “aesthetic and aspirational” or “achievable and DIY tutorial” nature, brands should be aware that discovery of content has transitioned from YouTube to Instagram. Search volume for beauty content used to be +34% higher versus last year on YouTube. Consumers are now organically discovering content to consume on Instagram, and “swiping up” for long-form content consumption on YouTube. This is key for brands who want to create both a discovery and consumption content strategy.

# Vertical: Entertainment

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Entertainment Vertical:

- Within the entertainment vertical, the top 20 influencers each have their own niche - comedy, music, modeling, etc. It's no surprise that regardless of their niche, they've gained massive followers by capturing their audience's attention via their content and staying relevant. The common thread across the top 20 is their audience's psychographics. Using IBM Watson technology, the top 3 psychographics that emerge for all 3 influencers are: cheerfulness, self-expression, and curiosity.
- Those who follow entertainment influencers are +52% more likely to be following brand versus influencer pages, compared to the average audience on social. Which means if brands activate influencers in the entertainment space, then brands are more likely to build equity with the influencer's audience since they have a high-propensity for following and engaging with branded content in the first place.
- Additionally, based on the nature of the content, this vertical of influencers has the highest "tag a friend" action across all the verticals. Therefore, these influencers have high reach with their content.



## How Influencers in this Vertical are Effective at Driving Success for Brands

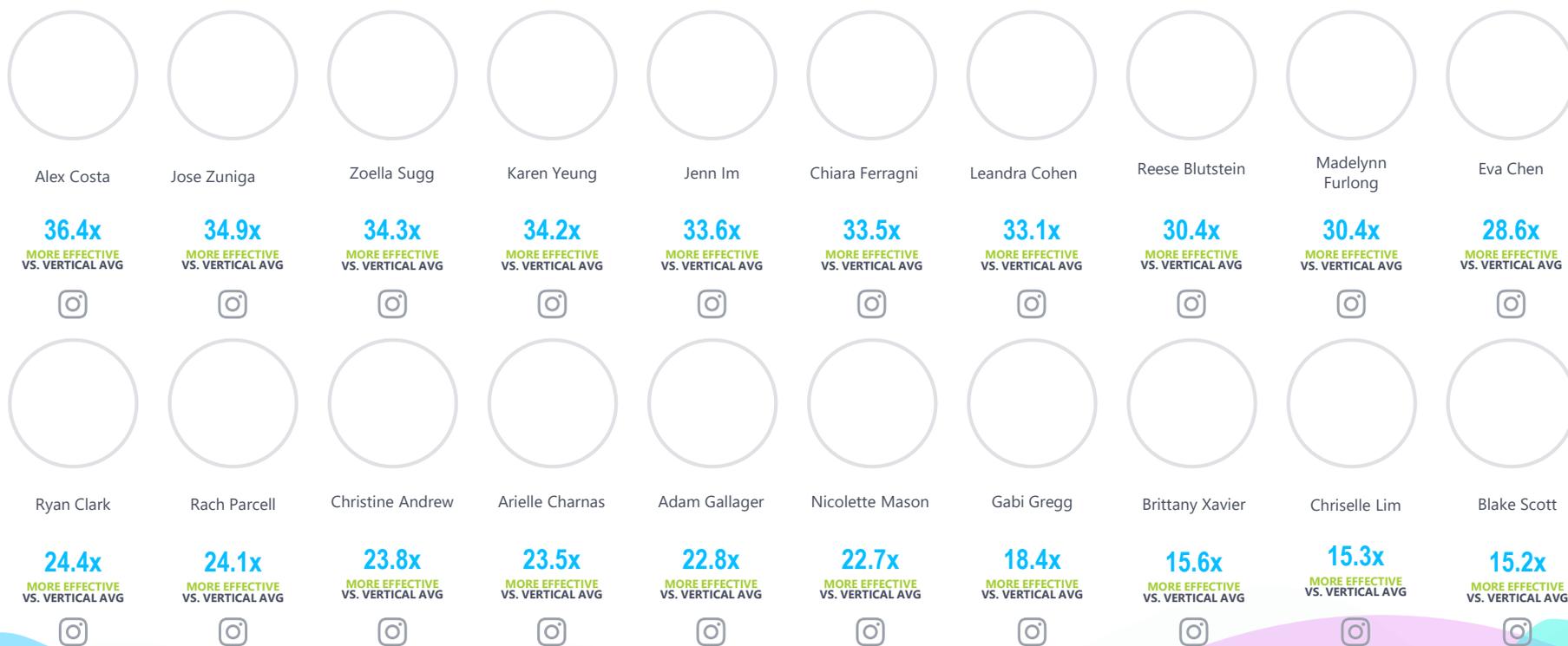
Brands can see success with influencers in this vertical who can help humanize their brand. The influencers in this vertical have demonstrated their ability to organically incorporate preferred brand messaging and products, with above-average Oracle Moat attention and viewability metrics.

# Vertical: Fashion

## Top 20 Influencers - OMD Influencer Audit

### Key Insights for the Top 20 Influencers in the Fashion Vertical:

- Similar to the Fitness vertical, Instagram emerged as the top platform for fashion in comparison to Facebook, Twitter, and YouTube based on the visual nature of the platform, as well the platform's ability to tag products within the actual imagery.
- The majority of the top 20 influencers who made the list have dedicated blogs where they serve their subscribers with long-form content. They have built a reputation that exists outside of social. Their personal blogs are when these influencers get into detailed reviews around brands and products.
- These top 20 influencers also incorporate a "lifestyle" component into fashion-related content. Approximately 48% of all the comments on the top 20 influencers posts asked for more details around their day-to-day and/or described their love for the influencer's lifestyle and content. Out of all the verticals, influencers in the fashion vertical received the highest positive sentiment from their followers.



### How Influencers in this Vertical are Effective at Driving Success for Brands

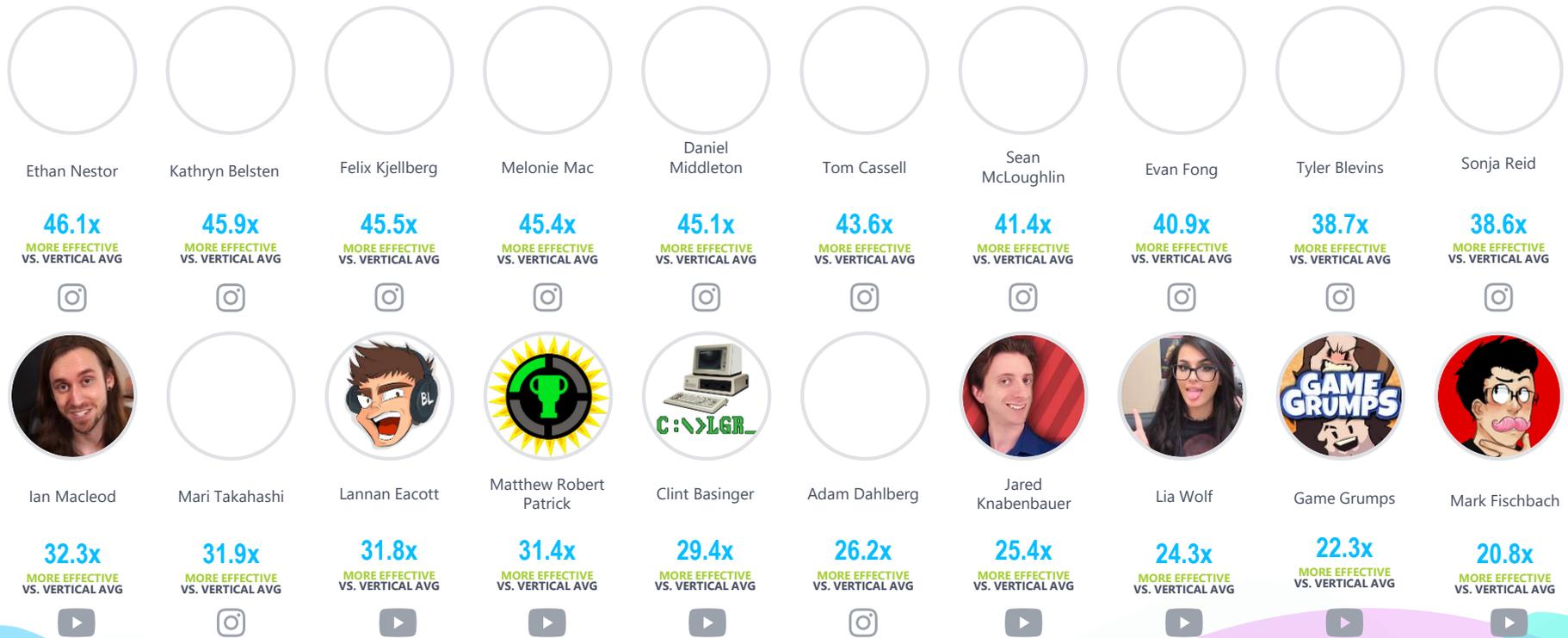
The top 20 influencers in the fashion space receive the highest level of advocacy from their followers compared to other verticals. This is an indicator of their likeability and their ability to generate trust with their audience. Brands can take advantage of this opportunity and use these influencers as a proxy to communicate the brand's messaging and product humanized via a lifestyle.

# Vertical: Gaming

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Gaming Vertical:

- Although gaming influencers have multiple social channels (i.e. Twitter, Instagram, Twitch, YouTube, etc.). In the last year, Instagram emerged as a key engine for driving traffic across multiple of their owned social accounts. The top gaming influencers are using Instagram as a way to “tease” their followers when they drop content on Twitch, YouTube, Twitter, and/or sometimes Facebook.
- Influencers are using Instagram as their “personalized” and “lifestyle” page. This content strategy on Instagram is an opportunity for both gaming and non-gaming brands.
- The top influencers with referenced YouTube channels, have grown their followers astronomically in the last year by incorporating comedy and skit-based content among traditional “let’s play” and “walkthrough” content, in addition to specializing in a niche game genre.



## How Influencers in this Vertical are Effective at Driving Success for Brands

Given gaming influencers are using Instagram as their “personalized” and “lifestyle” page, this content strategy is an opportunity for non-gaming brands looking to organically incorporate their brand. Gaming brands can also stand out from the classic “let’s play” and “walkthrough” content on YouTube and Twitch. An audience analysis of the top 20 influencers in this vertical indicates that technology and snacks are the two primary affinities and interests outside of gaming.

# Vertical: Home

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Home Vertical:

- Similar to the Fashion and Fitness vertical, Instagram emerged as the top platform for fashion in comparison to Facebook, Twitter, and YouTube based on the visual nature of the platform, as well the platform's ability to tag products within the actual imagery.
- Similar to the Fashion industry, the top 20 influencers incorporate a "lifestyle" component into home and decor-related content. Approximately 36% of all the comments on the top 20 influencers posts asked for more details around the influencer's day-to-day and/or described their love for the influencer's lifestyle and content. The home vertical is the 2nd highest in terms of positive sentiment and advocacy received from followers.
- Based on textual analysis, the highest volume of comments thanked these influencers for providing ideas and making affordable decor look far more premium and expensive based on the ideas they offered.



## How Influencers in this Vertical are Effective at Driving Success for Brands

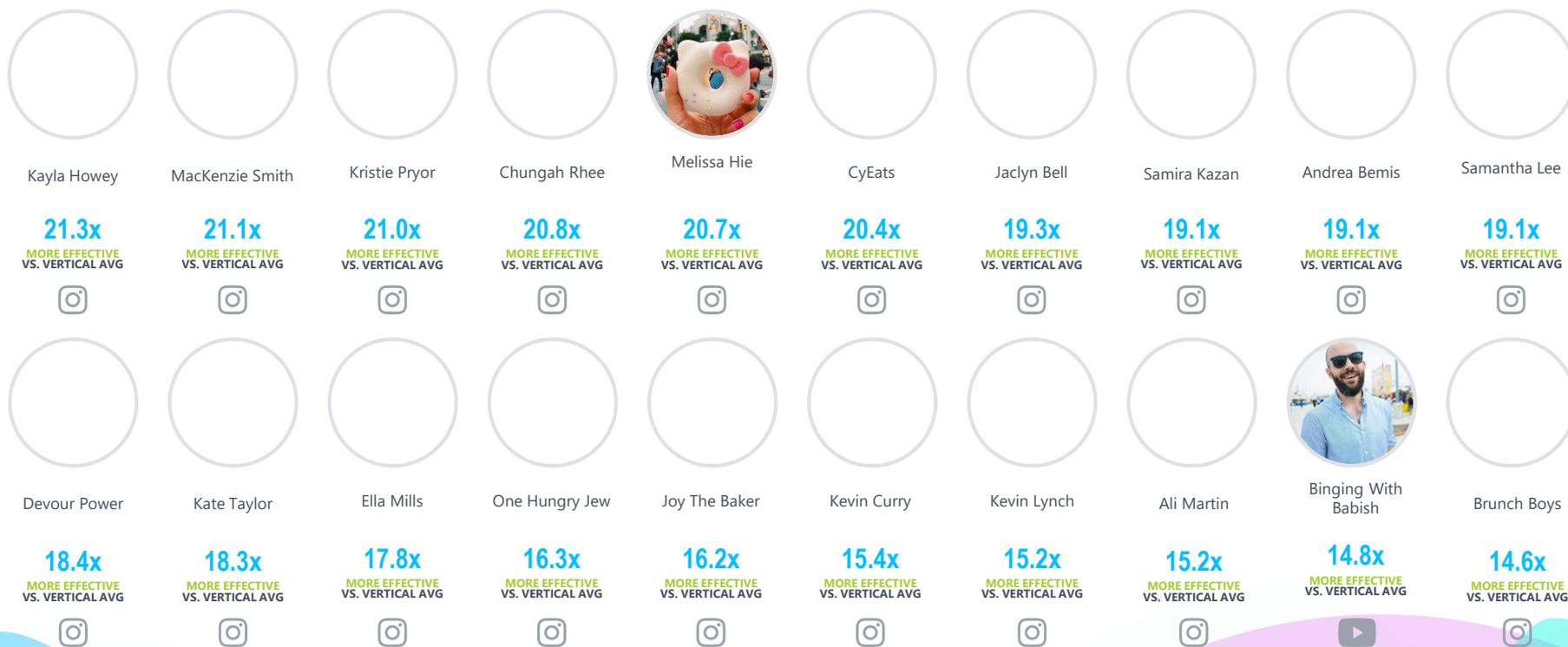
The top 20 influencers in this vertical have demonstrated their ability to organically incorporate a combination of affordable brand products into a singular environment. The success is demonstrated based on the overall advocacy demonstrated by their followers. This is an opportunity for brands to collaborate with these influencers to find creative ways to incorporate their products as a means to inspire home decor and overall lifestyle.

# Vertical: Food

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Food Vertical:

- Although the majority of the top influencers have their own blogs, they utilize Instagram as their “go-to” account, given the visual nature of the platform and food.
- The influencers who made the list demonstrated their ability to create relevant content based on changing food trends (i.e. paleo, gluten-free, plant-based, Whole 30, etc.). Content that specifically highlighted a common food trend during the year, based on social listening data, performed +26% higher in terms of engagement.
- Based on textual analysis of follower comments on the posts across all the top influencers, positive sentiment was primarily seen around food posts that had unique combinations and inspired users to recreate the recipe. Additionally, for influencers whose niche is more restaurant-based food, followers enjoyed the “discoverability” and finding new places they can go to that they didn’t know existed.



## How Influencers in this Vertical are Effective at Driving Success for Brands

The learning from analyzing this vertical indicates the importance of influencers staying up-to-date with food trends and relevant topics. As such, brands should leverage these trends to make sure they're surfacing the most relevant to consumers through the influencers. Additionally, CPG brands especially can work with influencers to incorporate their products into unique recipes. Sponsored content that does this generates +41% more engagements than standard product shots.

# Vertical: Auto

## Top 20 Influencers - OMD Influencer Audit

### Key Insights for the Top 20 Influencers in the Auto Vertical:

- The top 20 influencers specialized in the auto vertical have built trust with their followers, as evidenced by the above-average positive sentiment index for these influencers. Psychographically this is impressive as, followers of auto influencers are typically highly-skeptical and under-index on the agreeableness trait per IBM Watson.
- Similar to the gaming vertical, auto influencers have multiple social channels (i.e. Twitter, Instagram, YouTube, etc.). In the last year, Instagram emerged as a key engine for driving traffic across multiple of their owned social accounts. The top auto influencers take advantage of the platform's visual nature. Content that features the car in front of landscape scenery has a 61% higher likelihood to generate above-average engagement versus other types of static or video content. Note that influencers primarily use Instagram as a way of "teasing" longer-form content.



### How Influencers in this Vertical are Effective at Driving Success for Brands

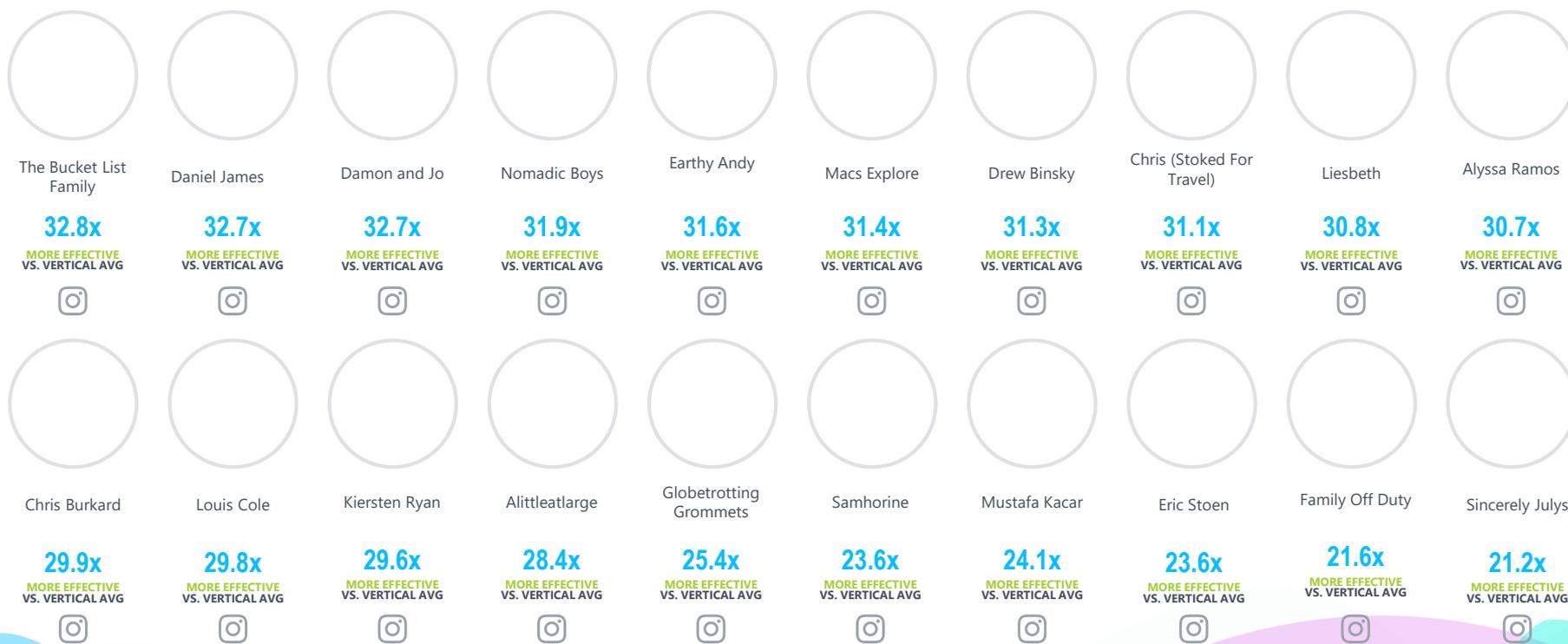
Brands who partner with auto influencers are able to build long-term brand equity and positive brand perception with the influencer's audiences, as evidenced via social listening. Additionally, these top 20 influencers have above-average positive sentiment index among a highly-skeptical audience that indexes low on agreeableness, per IBM Watson.

# Vertical: Travel

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Travel Vertical:

- Similar to many of the other verticals, Instagram emerged as the top platform for travel, given the visual nature of the contents and platform.
- Many of the travel influencers who made the top 20 list also specialize in photography. As such they are able to capture the visually stunning moments in time that their audience naturally engages with. Based on the textual analysis performed on the comments users left influencers, approximately 57% called out the visually stunning nature of the content that was posted.
- The content strategy used by the top 20 influencers entails informational and discovery content around travel destinations, travel tips, unusual spaces, documentation around their personal travel journey that their followers can relate with, and highlights around their travel lifestyles and situations which appeal to their audiences.



## How Influencers in this Vertical are Effective at Driving Success for Brands

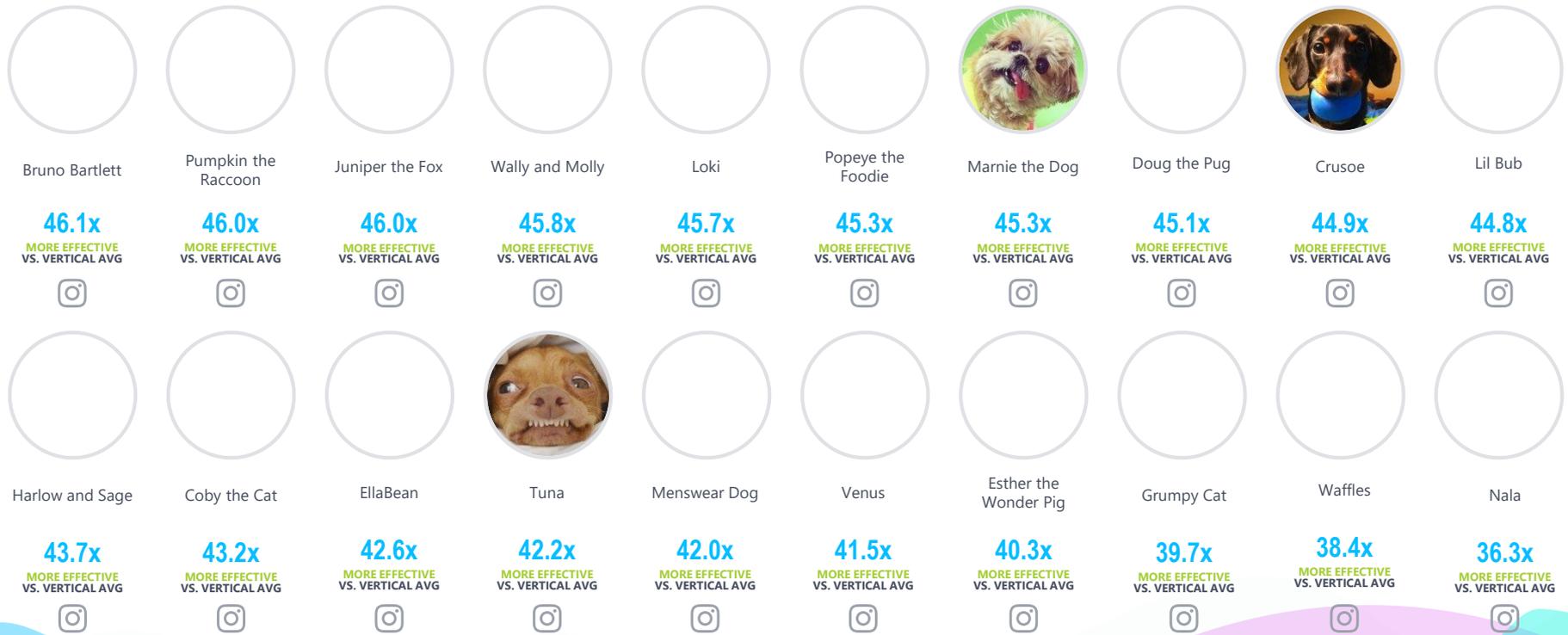
The audience demographics the top travel influencers have attracted consists of wide reach over diverse audiences in terms of age, income, ethnicity, and geographical location versus the average social audience. Additionally, on average, 42% of the followers across the top 20 influencers are 17.8x more likely to spend on travel versus the average social audience. By brands engaging travel influencers, they also have an opportunity to convert followers down the line given the natural follower propensity to spend on travel.

# Vertical: Pets

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Pets Vertical:

- In comparison to the other verticals examined, the pets vertical generated the highest volume of engagements and overall share of engagements.
- Based on textual analysis of the follower comments on the top 20 influencers, it appears that the “cuteness” of the animals, combined with the underlying comedic tone and visual photography is responsible for driving engagement volumes.
- Similar to the travel industry (however, more so), pet influencers display the highest diversity in audiences in terms of age, income, interests, and geography, versus the average social audience.



## How Influencers in this Vertical are Effective at Driving Success for Brands

Given the high engagement that exists with pet influencers, non-pet brands are such as REI, Vogue, Mercedes-Benz, etc. are leveraging influencers to organically generate high brand engagement and association. Branded content that leverages these pet influencers generates engagement +94% above the average engagement rate compared to the brand's owned and operated channel.

# Vertical: Technology/Business

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Technology/Business Vertical:

- The top 20 influencers in the Technology/Business vertical are known for sharing their knowledge online, and frequently work in collaboration with companies as part of promotional brand deals.
- The content strategy influencers in this space utilize is focused on advice, information, reviews, etc. The tone across the content is motivational in nature and these influencers have grown their audience by focusing on the topics relevant to entrepreneurship, growth, and keeping up with technology.
- Additionally, these influencers have multi-channel platforms where they primarily use Instagram to tease longer-form content on their blog, YouTube, iTunes podcasts, etc.



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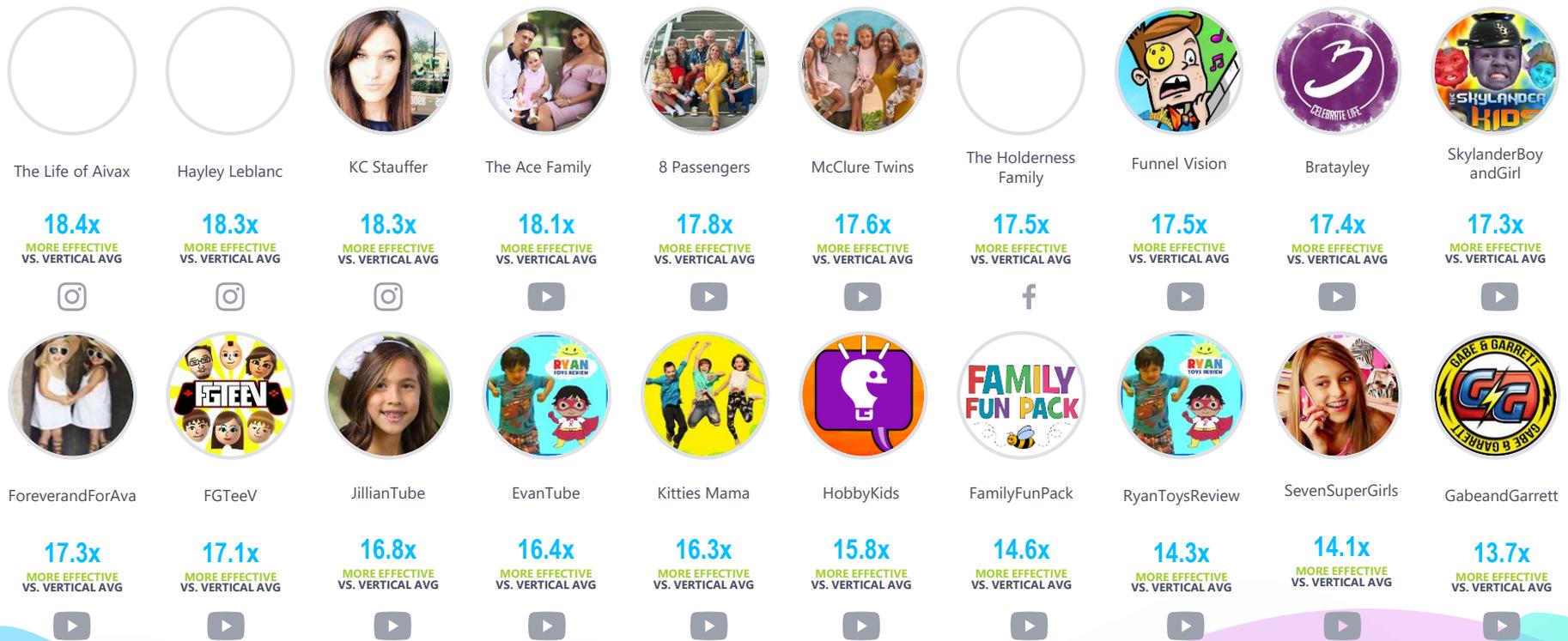
Influencers in this vertical frequently collaborate with companies as part of promotional brand deals. The top-performing content for influencers in this vertical primarily consists of motivational content, where followers can tag their friends (performs +58% above average in terms of the engagement rate). Note that brands can capitalize on this effective content strategy by structuring promotional branded content that drives a wider reach through a hybrid motivational and standard strategy.

# Vertical: Kids and Family

Top 20 Influencers - OMD Influencer Audit

## Key Insights for the Top 20 Influencers in the Kids Vertical:

- Based on textual analysis of the follower comments across the top 20 influencers, it is evident that these influencers are “go to” figures for kids in the space. This observation is evidenced by the high volume of positive sentiment and excitement that exists for product reviews, specifically.
- The content strategy from the top 20 influencers is mainly vlog and product review focused. Digital content creation in this space has allowed kids to emulate their favorite “go to” figures with how they talk, what they play with, etc.



## How Influencers in this Vertical are Effective at Driving Success for Brands

Product reviews in this space for toy manufacturers and brands have been highly effective at driving sales. The ability for viewers to see how their favorite influencers interact with products is key for driving approximately 44% of the conversation which displays “purchase intent” (i.e. I want to buy, I can’t wait to get it, etc.).



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