



REPORT

The Global State of Influencer Marketing in 2019



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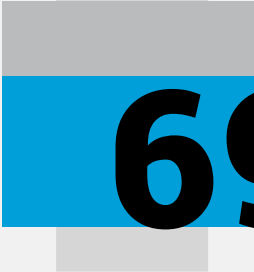
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Abstract: 3x3 stats, challenges and insights


2019 might be the year where brands will finally come out of the experimentation phase, yet marketers still seem to be looking for answers. Based on a global survey of over 800 marketing and PR professionals, this report will provide you with actionable insights on the level of maturity of influencer marketing around the world, as well as how to elevate your influencer marketing strategy going into the new year.

TOP 3x3

Figures



69% rank influencer marketing as an **important or top strategic priority**



71% of IM professionals currently work with **50 influencers or less**.



61% will increase the amount of money they invest in influencer marketing in 2019.

Challenges for brands and agencies



38.9% **Measuring the ROI** of influencer marketing



21.5% Identifying **impactful influencers**



15.8% Finding **creative ways** to work with influencers

Strategy Insights

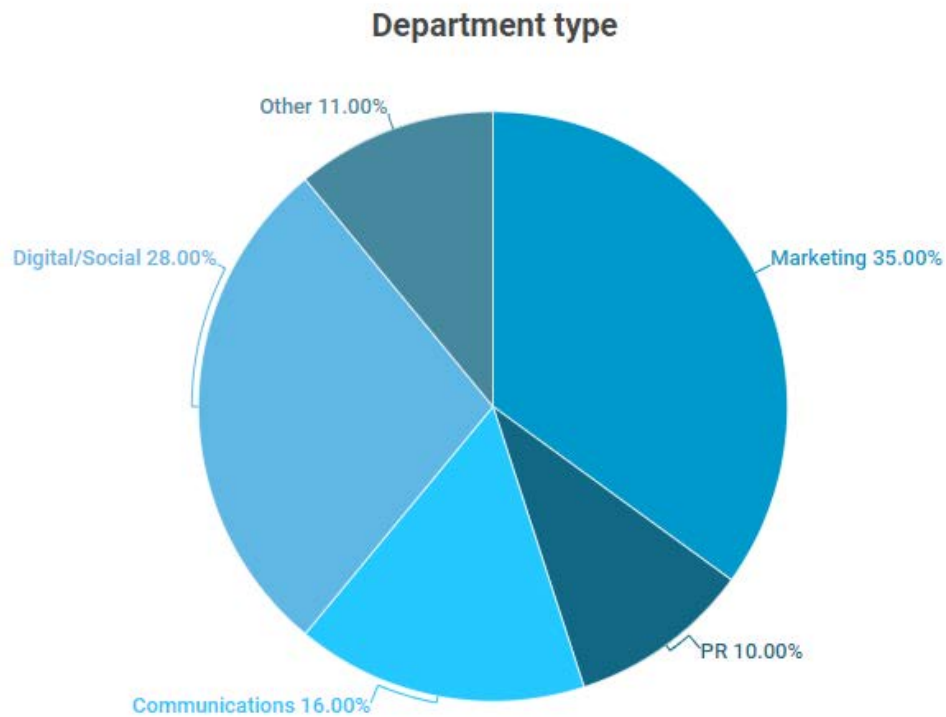
A quest for authenticity: in the era of fake news, fake communities and fake engagement, brands will look for long-term relationships with value-driven influencers to promote their product and services.

Time to measure and automate: Most professionals working in influencer marketing still do most of the work manually, away from the striving MarTech landscape.

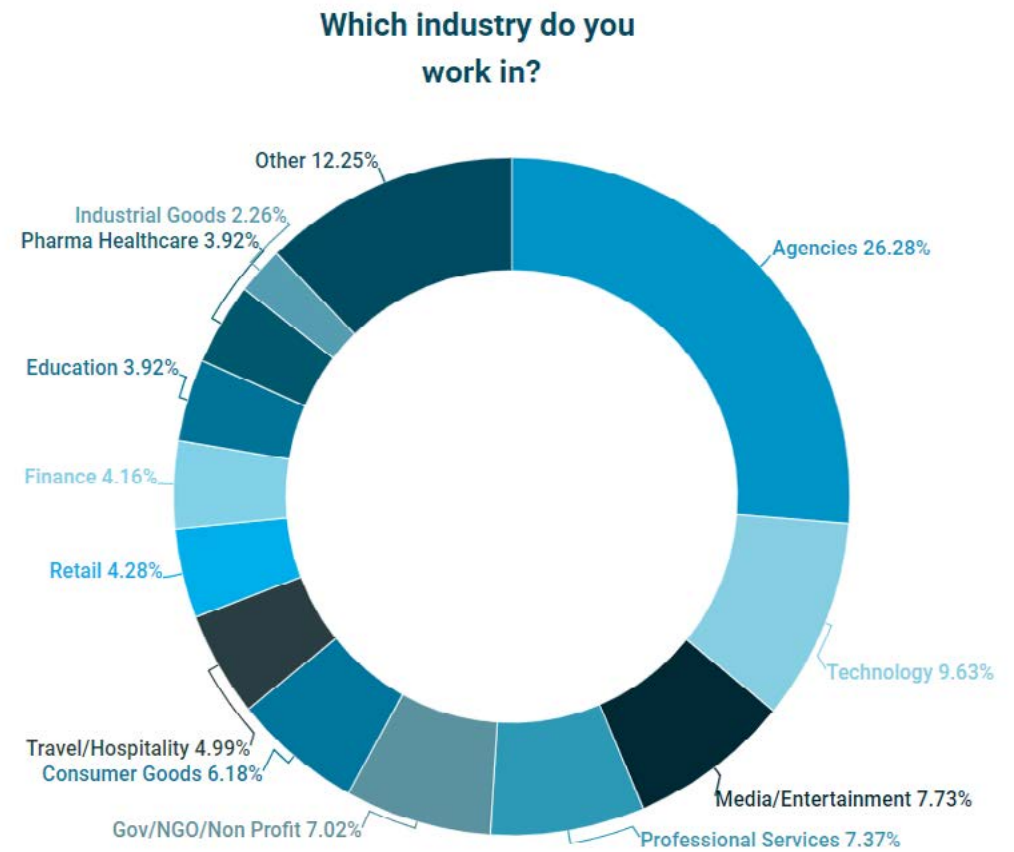
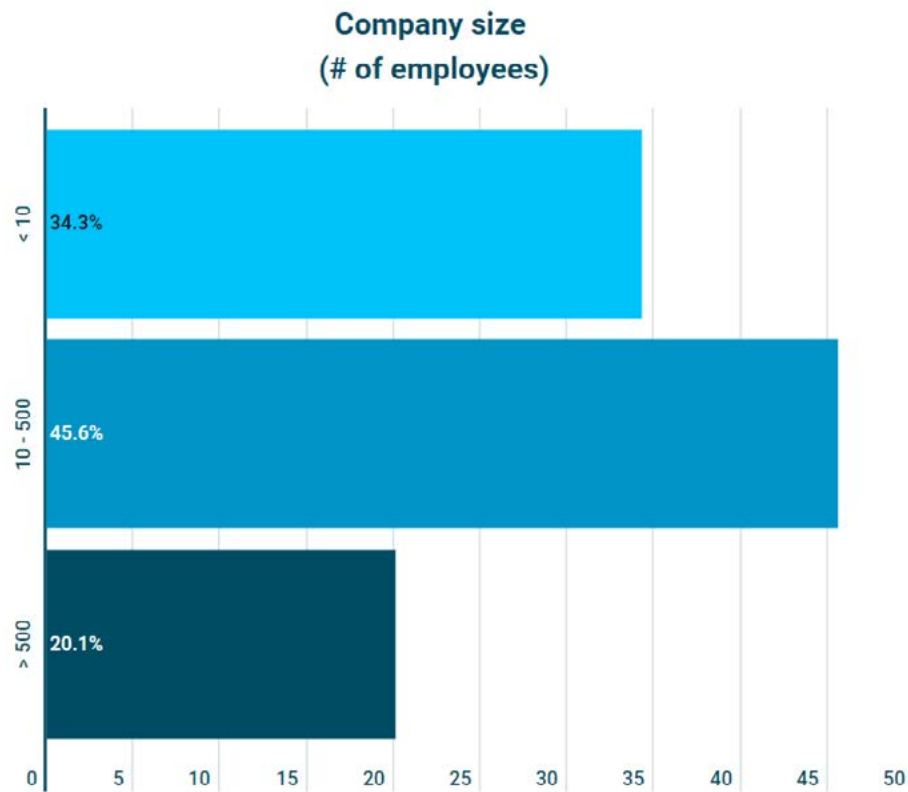
Influencer marketing as a competitive advantage: with a mere 31.5% of respondents having an official influencer marketing program in place, opportunities will abound in 2019 for those trying their hand at influencer marketing.

Methodology

The results presented in this report are based on a global survey conducted by Talkwalker between November 2018 and January 2019, and completed by a total 823 respondents. *No compensation was given to any participants.*



In order to put these results into context, we've also collected contributions from industry experts that will be featured throughout the report.

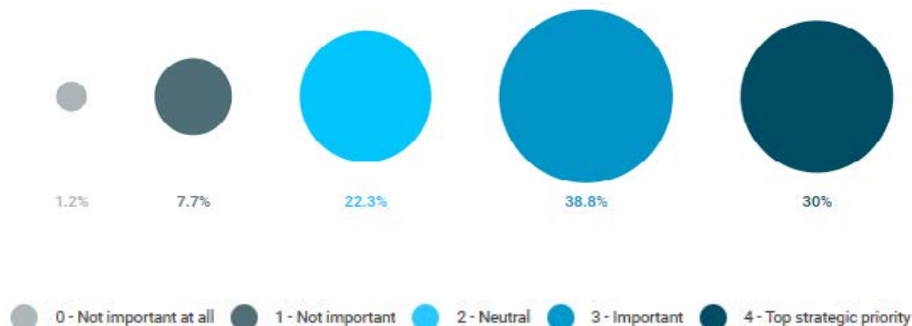


Influencer marketing is a top priority for brands and agencies

Influencer marketing has been a buzzword for many years, but several brands and agencies still have to take full advantage of this channel, with less than 32% of the respondents having an official influencer program in place at the time of the survey.

So how big of a strategic priority is influencer marketing in 2019? We asked our respondents to rate influencer marketing from 0 to 4, with 0 being not important at all, and 4 pointing to a top strategic priority.

How important is influencer marketing to your brand or agency



One of the signs suggesting that influencer marketing is still an emerging field is the fact that most of the work is still done manually: a minority of those who already have a influencer program in place use dedicated tools to identify, manage and measure the performance of their influencers.

The screenshot displays the Talkwalker interface for an influencer profile. At the top, there are tabs for Overview, Content, Audience, and Notes. The profile for Iker Casillas is shown, including his bio and a list of labels like 'Official ambassador', 'addidasfootball', and 'advocate'. Below this, the 'CONTACT DETAILS' section lists email, phone, and address information. The 'Media' section includes links to various social media platforms. The 'NOTES' section contains a list of updates and agreements, such as 'October 2018: 2 join events planned for xmas season' and 'June 2018: agreement around the IkerCasillas summer camp'. At the bottom, there is an 'Additional info' section with an 'Upload File' button and a list of uploaded files like 'Scheduled posts agreement' and 'Sponsorship contract 2018-2019'.



"This will have to change. While there will always be a need for human to human interaction, technology will eradicate a lot of the grunt work allowing professionals to focus on the important things like creative direction and maintaining relationships."

Stephen Davies

@stedavies, Social Media
Marketing Strategist

62.7%

of respondents do not use a tool to detect, manage and measure the performance of their influencer marketing initiatives.

How do brands work with influencers?

One respondent summed up this conundrum perfectly: *"Influencer marketing, like all forms of marketing, is really a matter of resource constraints. It's great to do it, but it has to make sense to spend the effort, time and money to get things published - all while juggling other, competing priorities."* In this context, we wanted to know more about the goals set by brands and agencies, as well as the people, time and budget involved in the process.



Priority number one: make my brand visible

When asked what was the top objective of their influencer marketing initiatives, respondents cited brand visibility (65.8%) and lead generation (16.9%) as their two main drivers, well ahead from the search for more creative campaigns or added loyalty from their customer base.

Other answers revolved around thematic such as recruitment, education, thought leadership and attempts to change brand perception.

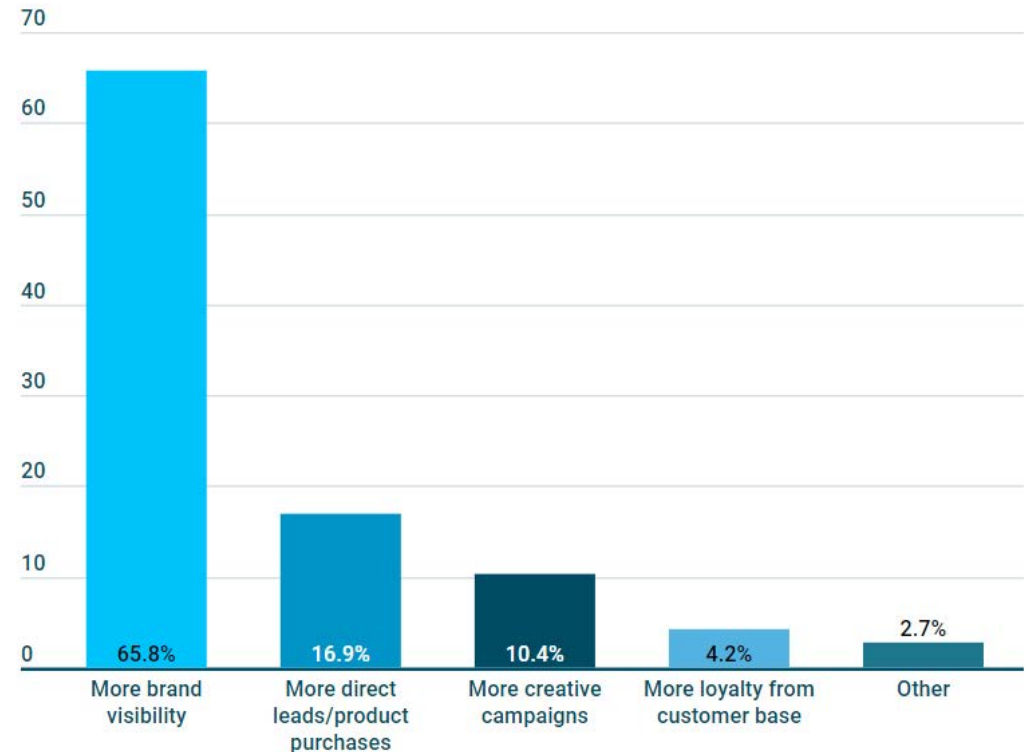


"With 31.5% of your respondents having an influencer marketing programme in place, it shows that businesses are starting to invest and trust in this strategy. Rather than the traditional influencer marketing campaigns which are heavily adopted across the industry, the top brands are collaborating with influencers in the most innovative and exciting ways to grab attention. This will provide an actual competitive advantage."

Harry Hugo

@HarryHugoGoat, Co-founder of the Goat Agency & Board Member of the Business of Influencers

What is the main objective of your influencer program?





Down with the following!

The first criterion for influencer selection used to be the size of his or her readership or community, or, in social media speak, the number of followers one had on Twitter or Instagram, for example. However, the facts that bots can now auto-like, auto-comment or auto-follow selected accounts has brought much suspicion on the massive communities of macro influencers (more on this in the challenges section of the report).

Brands and agencies now seem to be focusing on criteria such as the coherence of the influencer's posts with the brand message, as well as the quality and creativity of their content. Some of these concerns might be linked to the reputational risk represented by some of these partnerships, as well as a continued search for authenticity.

Quote from respondent: *"Few influencers are really creative; most of them are more interested in taking selfies rather than produce qualitative content."*

Order of priority

1. Coherence of posts with brand message
2. Quality and creativity of content
3. Level of interactions on relevant publications (engagement)
4. Size of community and readership
5. Costs involved



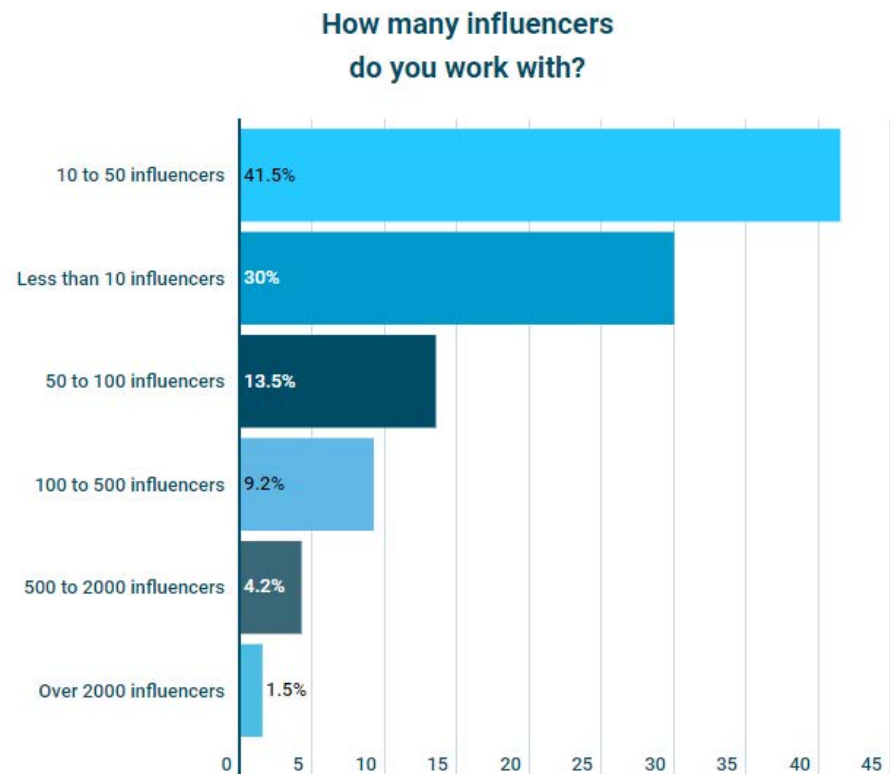
"This is a surprising stat especially in the era of nano and micro-influencers. Perhaps these are long-term relationships with influencers who fit perfectly with the brand and are true advocates as well as influencers. In the future this number will only increase as brands diversify the influencers they work with and roll out more influencer-focused campaigns."

Stephen Davies

@stedavies, Social Media
Marketing Strategist

Long-lasting relationships with a small group of influencers

Over 71% of respondents declared they were working with 50 influencers or less, which is consistent with the idea expressed by several respondents that they would rather create long-lasting relationship with influencers that reflect their brand's values rather than spread their efforts on many ephemeral initiatives.

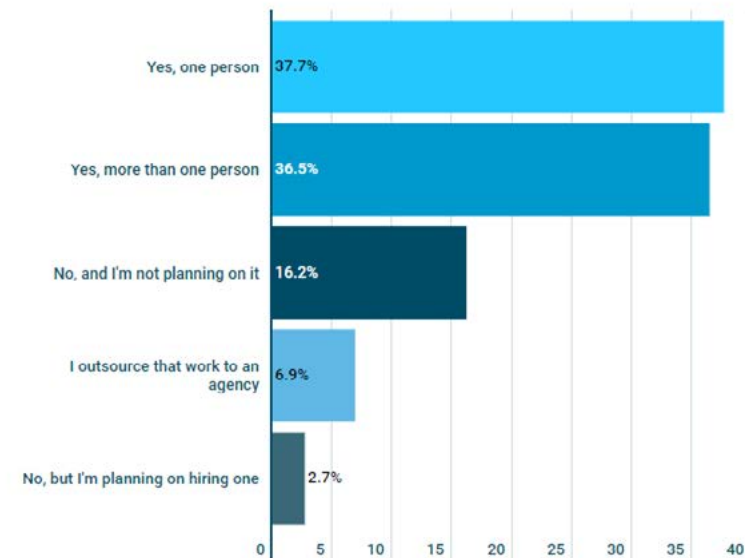


Dedicated influence specialists for better accuracy

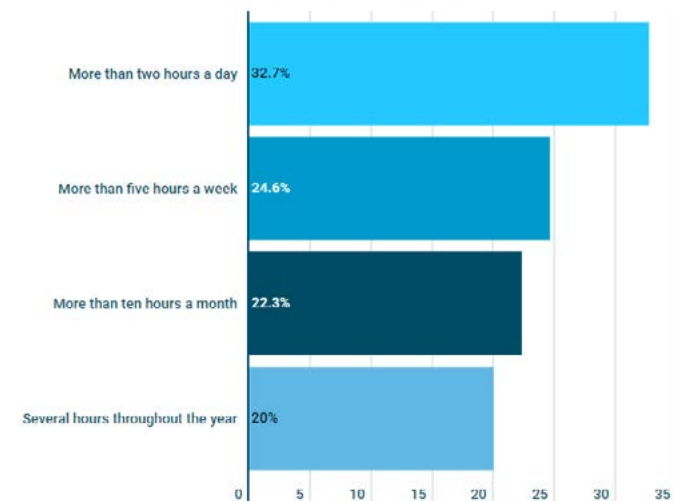
Brands and agencies which practice influencer marketing still exhibit various levels of maturity, yet a majority of them have put in place in-house reference for influencer marketing. Amongst respondents who have a dedicated influencer program, over 74.2% have at least one person fully dedicated to the identification and management of the organization's influencers.

On average, these dedicated influence specialists spend more than two hours a day working on their influencers campaigns and relations, according to 33 percent of the people surveyed.

Do you have a dedicated person to take care of your influencer program?



How much time does your team invest in Influencer marketing?

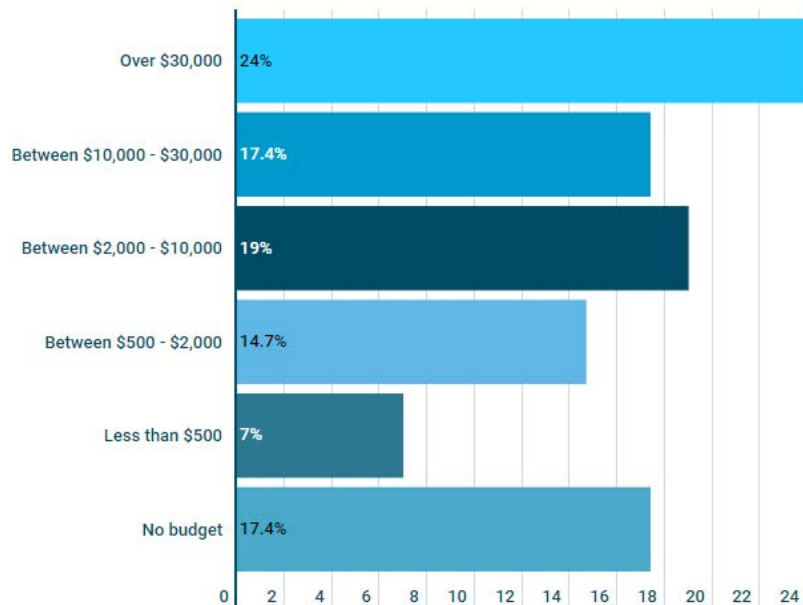


What about budget?

Another area of fascination for brand marketers and PR professionals is how much they should spend on an influencer. Asking this question was also a way to understand whether they trusted influencer marketing as a viable strategy for 2019.

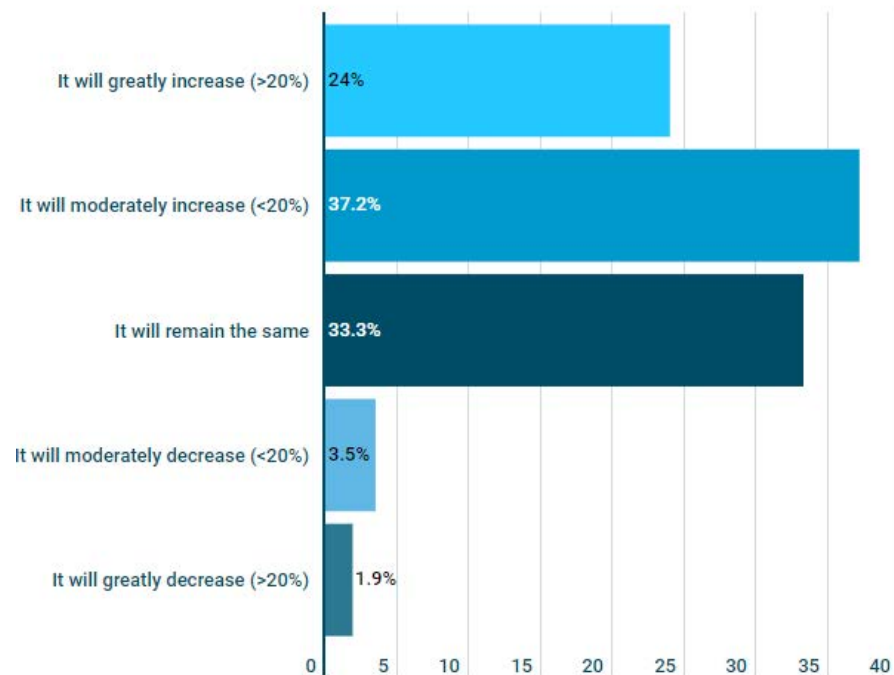
The answer was a resounding yes. Over 57% of respondents that are part of companies with more than 500 employees announced a yearly influencer marketing budget over \$30,000 in 2018, along with 43% of those between 100 and 500 employees, and that amount will only increase this year.

What's your annual budget for influencer marketing campaigns?



One out of two of the overall respondents (51%) declared that their IM budget would either moderately or greatly increase in 2019, with mid-size companies scoring even higher (56%). At the other end of the spectrum, a mere 5.4% of all companies surveyed expected their allocated budget to decrease, and 33% expected it to remain the same.

How will your 2019 investment in influencer marketing compare to 2018?



What will be the top challenges for brands in 2019?

Measurement challenges

The biggest challenge for the industry in 2019 is clearly to connect their campaigns with revenue, as indicated by 38% of the respondents. Overall, marketers and PR professionals seem to still be looking for a framework to guide their work with influencers. They seem to know what they want to accomplish, but do not know how to measure the success of their initiatives.

As one respondent puts it, there is “too much personal opinion, not enough measurement”. In other words, the marketing industry is still very much relying on instinct rather than insights when dealing with influencers.

Some respondents compared the challenge of influencer marketing measurement with those encountered in print advertising, for example.

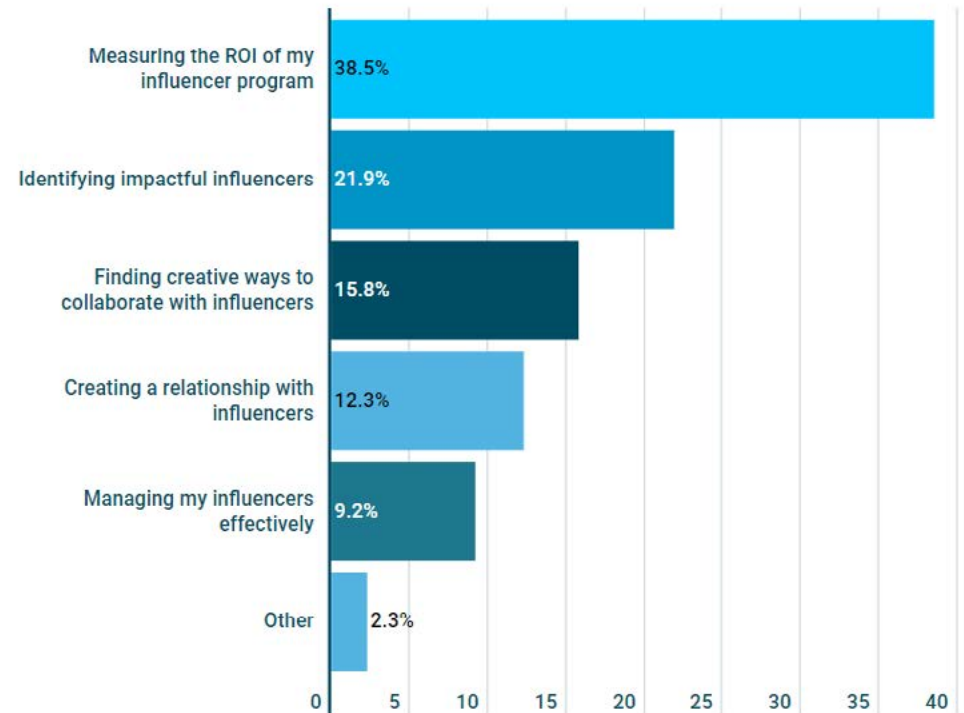


“You can’t just pick a celebrity you like and hope for the best. It is important that we use data and analytics to inform finding the right influencers and of course, at the end of the day, measure that it is successful so that marketers continue to invest in this type of programs and see real results.”

Brittany McKone

Vice President of Analytics
at Weber Shandwick

What is the top challenge you encounter when working with influencers?

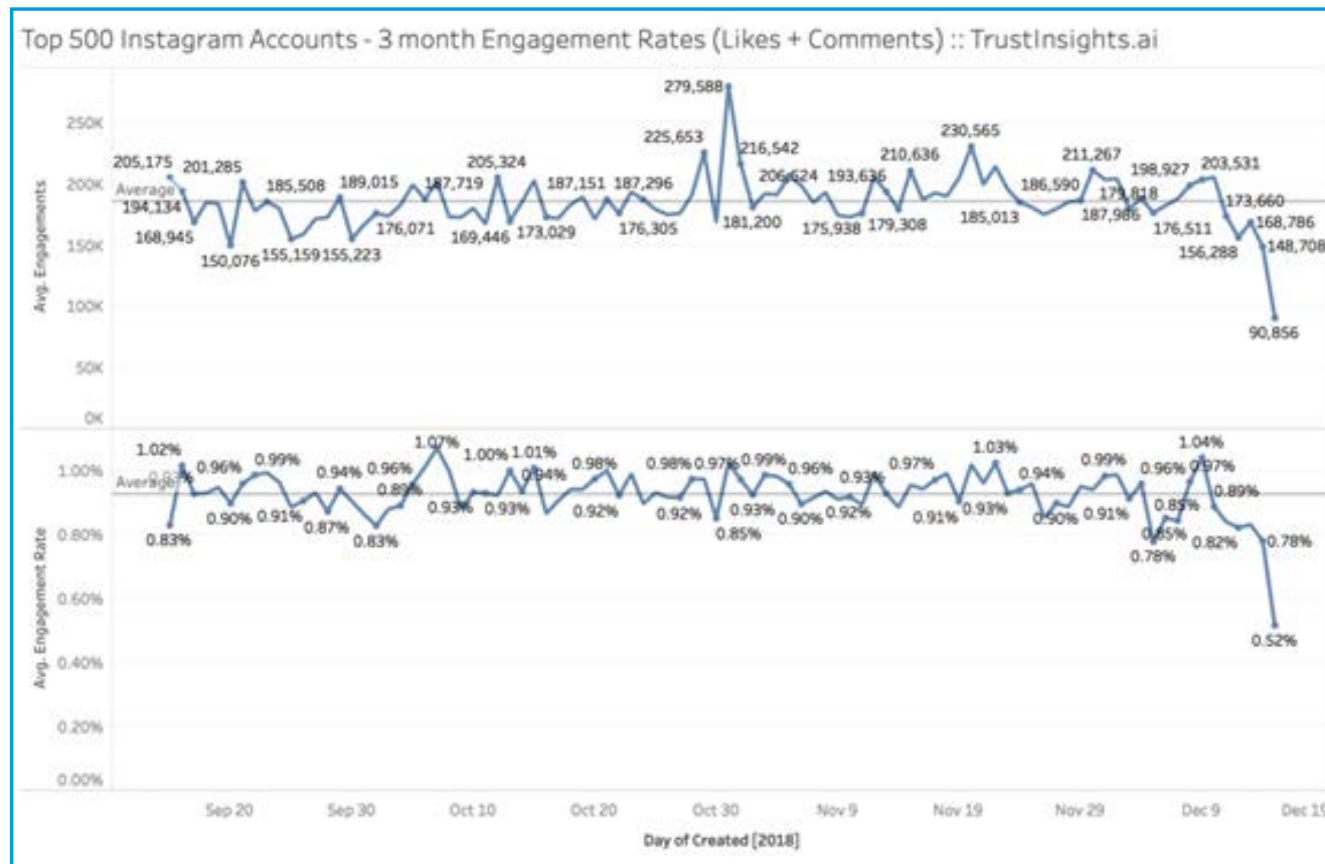


Influencer challenges

For some of our respondents, looking for effective influencers is like tracking the golden goose: in a nutshell, they feel that there are lots of fake numbers and few influencers with real impact in each industry.

The respondents often made the distinction between two “types of influencers”: real vs fake, passionate vs in for the money, honest vs superficial, real followers vs fake community.

These concerns about fake engagement can be exemplified by a recent study conducted by [Trust Insights](#), which tracked the top 500 accounts on Instagram between September and December 2018. On December 11, Instagram changes its API, disabling any tool that allowed accounts to auto-like, auto-comment or auto-follow on the social network. As you can see in the graph below, the impact on the engagement of these Instagram top dogs was immediate.





"One of the really interesting things that I think will happen in 2019 is that we'll have a new breed of influencers to contend with: entrepreneurs. What I mean by that is that influencers have grown a lot over the past few years and the market has gotten to a point where influencers have become businesses in their own right. More and more influencers will try to find new ways to increase their reach and monetize it - the question is, how will this affect their influence within their niche?"

Lilach Bullock

@lilachbullock, Content Marketing
and Social Media Specialist, Speaker

There is also a clear frustration with the lack of professionalism of some influencers, which often focus on the short-term gratification rather than on forging a long-term relationship with the brand, and have trouble dealing with brands when it comes to submit a proper partnership offer, or report on the results of a joint campaign.



Conclusion - 3 key takeaways for your 2019 strategy

Time for authenticity and long-lasting influencer relationships

Authenticity can be found at every corner in the open essays questions included in our survey: how do I make sure the public doesn't perceive our campaigns as buying influence? How do I reconcile influencers promoting multiple products with a level of authenticity and credibility with the product? How do I make sure my influencer has a real impact? Are their numbers real? How do I create authentic relationships with influencers?

Part of the reason for this questioning can be linked to recurrent influencer marketing fails such as the infamous Fyre festival, or the Payless influencer stunt, as well as to new developments in the industry with the appearance of virtual influencers such as Lil Miquela.

In 2019, this quest for authenticity will lead brands and agencies to look for long-lasting relationships with a few very specific influencers - focus on smaller actors whose numbers and impact are easier to track. This is why the criteria to select the best influencers for a brand have moved from community size to more qualitative aspects such as compatibility with the brand values, creativity of the post and engagement rate.





"Authenticity is the most valuable and necessary attribute influencers have to embrace in 2019 and beyond. The writing has been on the wall for this for a while now - the days of being fake and artificial are over. Real engagement, long-term focused relationships, quality of personal stories, and value-driven partnerships that are based on sound evidence should be essential requirements for influencers to have today. Individual influencers who can prove they are authentic will win the hearts and minds of their community and partnerships"

Karen Freberg

@kfreberg, Social Media Professor
at University of Louisville

The resurgence of brand purpose (as demonstrated by the Nike/Kaepernick campaign last September) has also raised awareness as to the need for the influencer's values to be in balance with those of the brand. Based on our survey, the latter has become the top one criterion in influencer selection, ahead of post creativity and engagement rate.

For agencies, this exercise of selecting the perfect influencer for their clients has transformed into the search for the perfect match as wary brands want to protect their reputation from careless influencers.



Invest & pray? The need for a clear measurement framework

As we've seen from the results of our survey, organizations will tend to invest more money in influencer marketing in 2019, with less than 6% declaring that their budget would decrease.

Yet despite this investment, there is still much confusion as how to measure ROI, which was a concern expressed by several respondents.

This lack of clear guidelines for measurement impacts all aspects of influencer marketing, from the number of resources you're willing to dedicate to these activities to the amount you can accept to pay an influencer for a specific campaign.

In order to get the most out of their influencer marketing campaigns in 2019, brands and agencies will have to put in place clear frameworks to interact with influencer and measure the outcome of their initiatives through set KPIs at both the influencer and the campaign level.

Part of the answer will also lie in automating the identification, tracking and measuring process through dedicated tools, rather than losing time doing all of these tasks manually.



Keep your ear to the ground - The ever changing marketing & PR game

One of the specificities of the marketing and PR industry is that it is in constant evolution. Between changing algorithms of social media platforms and search engines which regularly bring down your main sources and traffic and leads, emerging technologies and changes in the workforce, professionals have to keep their ear to the ground to be able to anticipate changes and adapt their strategy accordingly.

Quote from respondent: "It's a fast-growing market that changes often, resulting in a need for current information and trends. Additionally there's a lack of transparency on reach and value, making it challenging to contract with influencers and see tangible results."





2018 was a year of transition, with new legislation such as the European Union's General Data Protection Regulation (GDPR) coming into force last May, and increased scrutiny for both brands and influencers from bodies such as the United States' Federal Trade Commission or the United Kingdom's Committee of Advertising Practice. These new rules have already had an impact on the level of transparency required between brands and their influencers, and will continue to evolve throughout 2019.

Additionally, potential changes in algorithms, moving consumer trust and influencer popularity might further complicate the influence game - ambassadors that previously drove impact might no longer bring results.

Quote from respondent: "Having actual impact as an influencer is becoming more complex. If we take one of our topics and segment it based on size into A (large following), B (Medium), and C (Newbies), only the B tier has a noticeable impact in terms of traffic or sales. Once an influencer gets too large, they get tuned out."

Impact starts here.



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