

Social media celebrities as brand influencer

A content and audience analysis

macromedia study report sr-2018-01

This **first study on international and German social media celebrities as brand influencer** addresses the following questions: How relevant is their audience with regards to traditional media? How do they orchestrate their content across the different platforms? What attracts millions of subscribers to generate downloads of their content in the order of billions? And how do they deal with the multitude of advertising messages included therein?

We tackle them by **(1) an analysis of subscription rankings** of such influencers, **(2) a content analysis** in the categories particularly relevant for advertising for the **top 20 German and international celebrities**, and **(3) an online survey based on a representative panel with n=1000** among the 14 to 35 year olds in Germany.



INFLUENCER TYPOLOGY

Considerations on social media celebrities as brand influencer

TRANSMEDIA STORYTELLING

Content orchestrated by social media celebrities

AUDIENCE CHARACTERISTICS

Enticement and competition among consumers

CONTENT

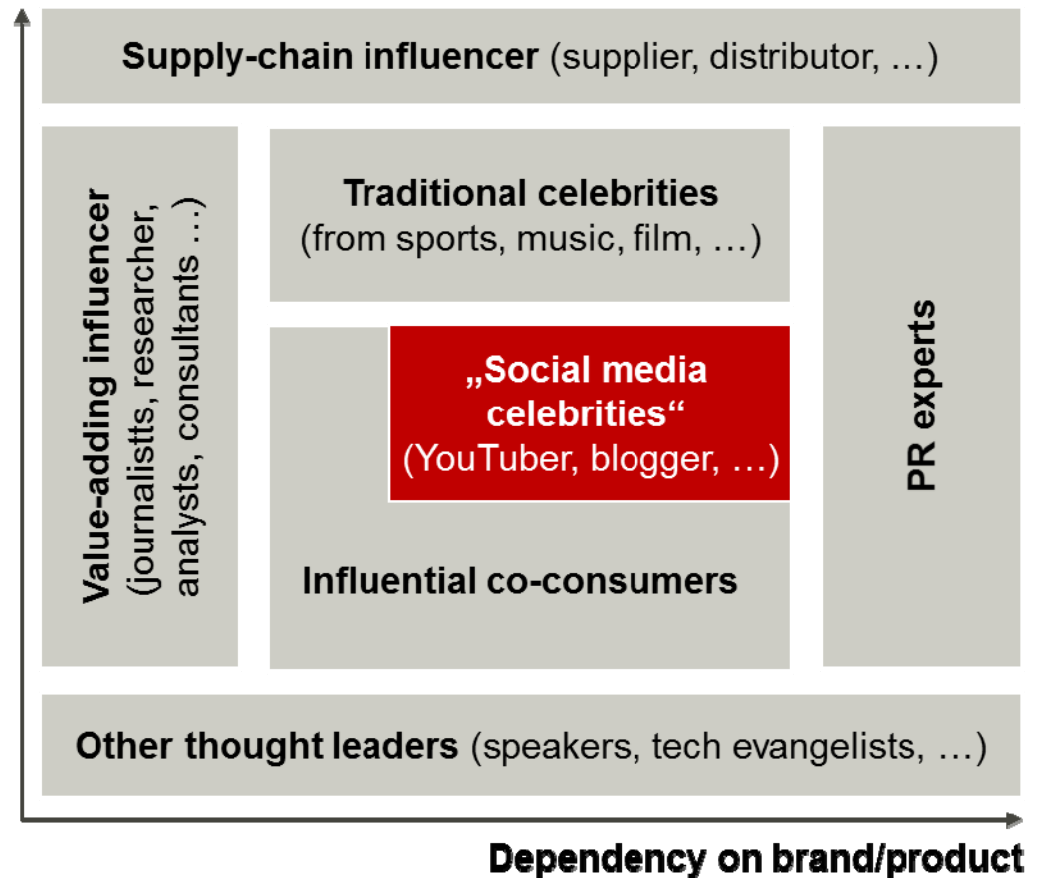
Social media celebrities as brand influencer

Influencers differ in their dependency on brands and the degree of institutionalisation

Some users stand out in their impact on brands as influential co-consumers being particularly active on diverse social media platforms.

A few even achieved stardom at least among the younger generation and provide a new powerful basis for promoting brands and products.

Degree of Institutionalisation

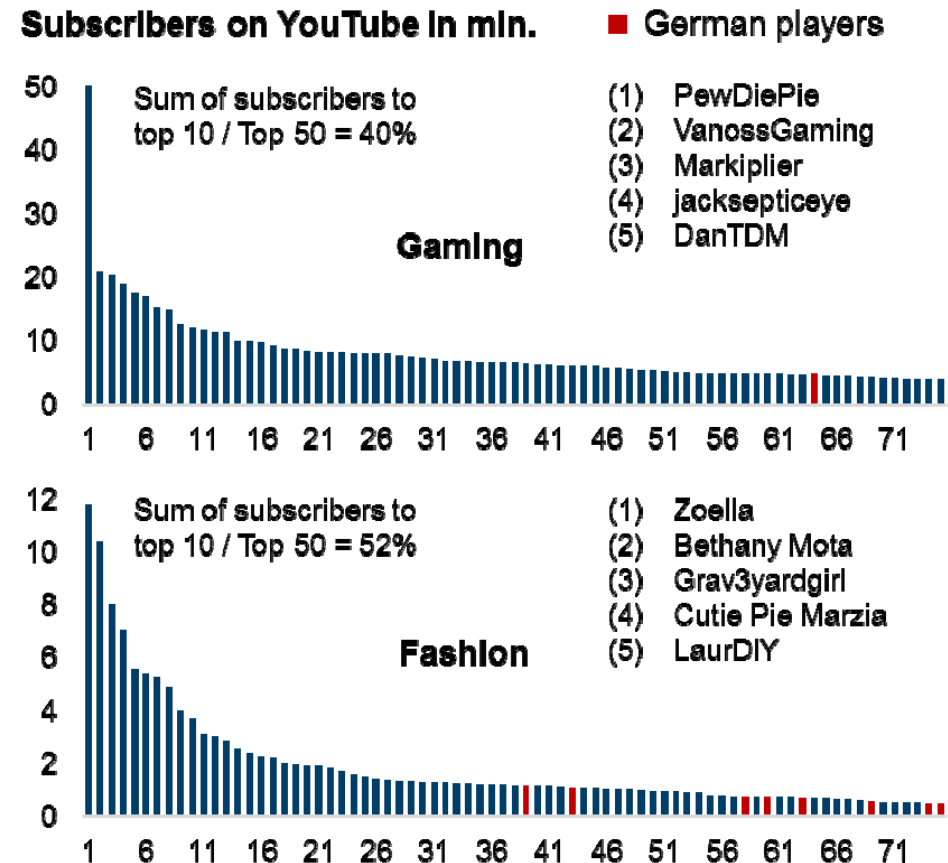


Rankings for celebrities from selected categories

Social media celebrities' subscription bases exhibit a relatively thick and long tail.

Social media celebrities post their content in channels on diverse topics. Gaming, fashion, and beauty are especially powerful environments for brand promotions.

Generally, the different celebrities within a category span a long tail from the today's most successful ones to the still would-be influencer.



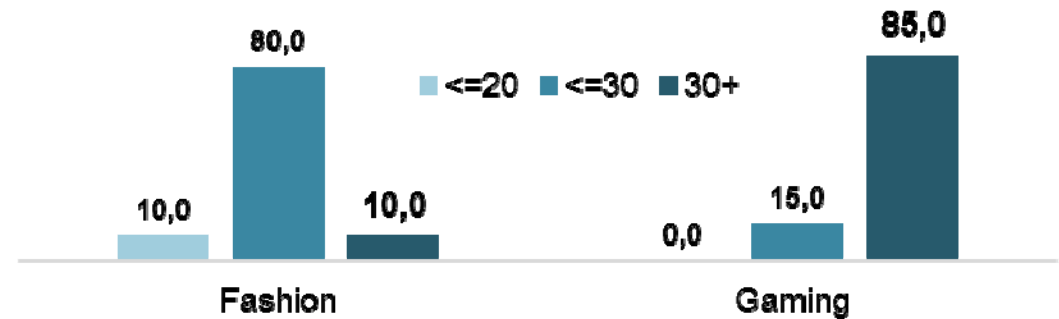
Source: Own analysis of audience data published by YouTube (Q3 2017); ranking by Socialblade (2017), Tubefilter (2017), Vidstatsx (2017)

Characterisation of social media celebrities

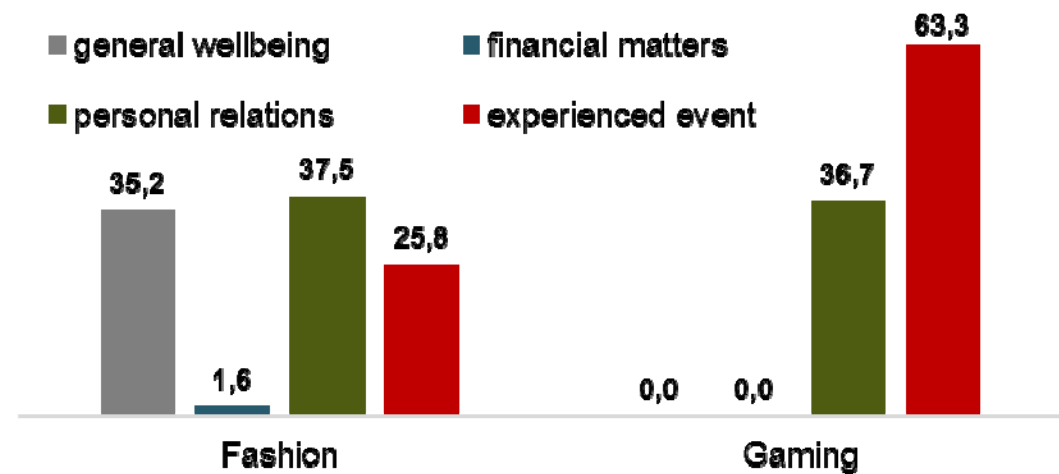
Influencers in different categories exhibit different communication styles

Both fashion as well as gaming video content is dominated by one-protagonist productions. However, gamers focus more on events (e.g. E-Sports) while fashion influencers prefer general wellbeing.

Age of main protagonist (%)



Aspects of self-disclosure per video contribution (%)



Source: Own content analysis; June 2017



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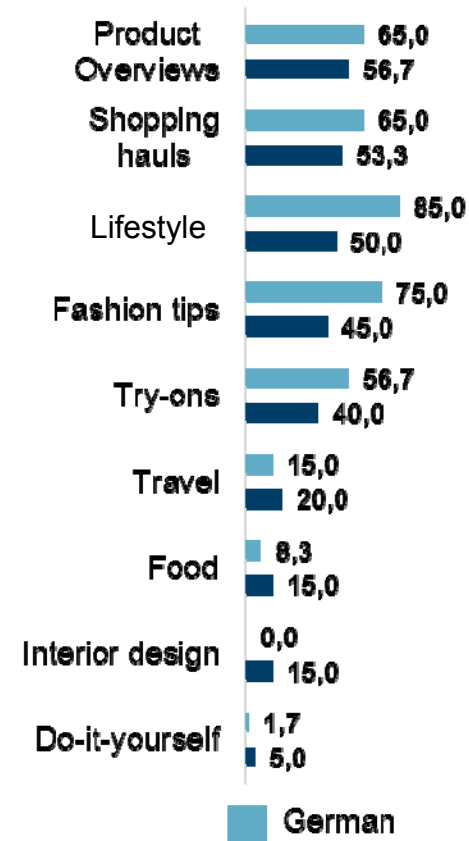
Key content of different influencer categories

Emerging trends in fashion are healthy living, interior design and do-it-yourself

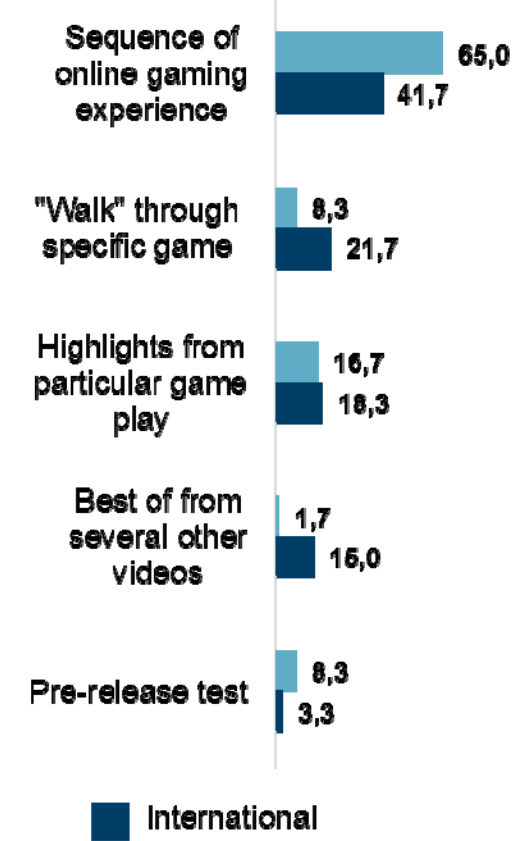
Obviously, the variety of contributions differs across categories. Emerging Trends in Fashion are Healthy Living (e.g. Food), Interior Design and Do-it-yourself (e.g. Clothing Hacks).

In fashion, German protagonists' content seems more varied than the international league's as most formats appear in higher frequencies.

Fashion (values in %)



Gaming (values in %)



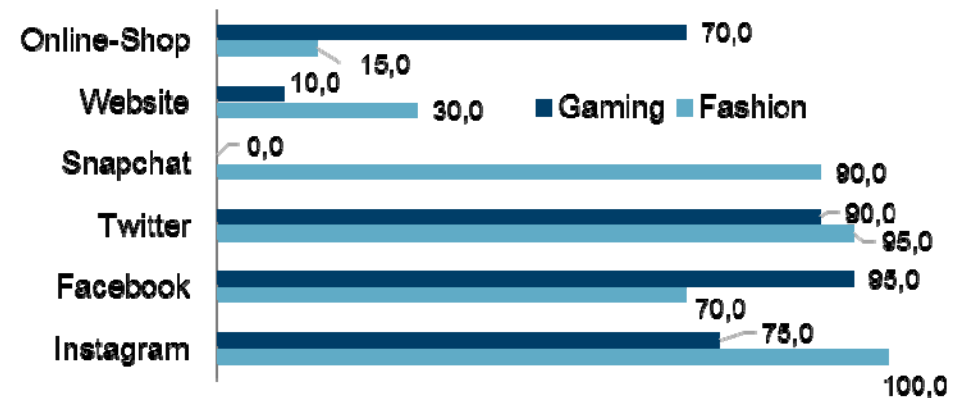
Source: Own analysis (Q3 2017)

Presence on different platforms

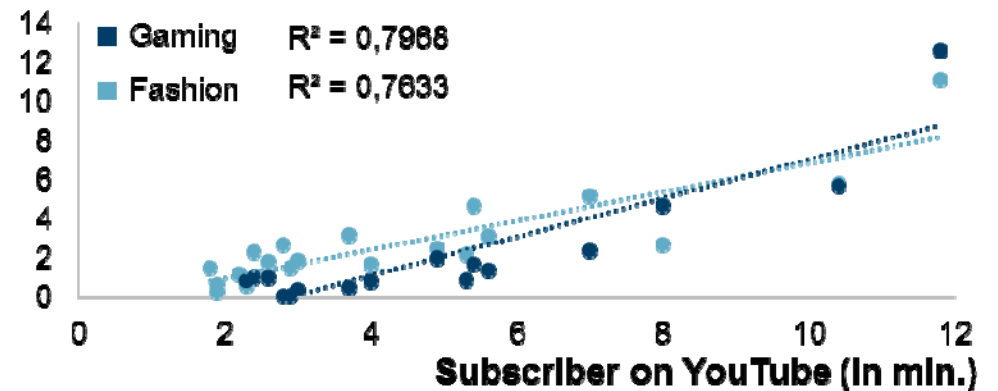
Fashion influencers prefer Instagram over Snapchat while Gamers focus much stronger on online-shops

Whilst in fashion Instagram became an absolute must in parallel to YouTube (often even preceding when counting success among subscribers), gaming celebrities run by far more often their own shops.”

Co-presence on platforms other than YouTube (In %)



Follower on Instagram (In mln.)



Source: Own analysis (Q3 2017)

Monetization models for Influencers

Most celebrities do not see their monetization models as a handicap and hence openly communicate it

Whilst newcomers are often happy with free product experiences for promoting specific brands or products or pay per video, more experienced celebrities rather go more systematically for CPE, CPC, and CPA.“

Model	Description
Pay per post/video	Influencer is paid a flat rate for the creation and publication of the post (video, blog post, tweet, picture).
Free product/experience	Instead of receiving financial compensation for his or her work, the influencer is offered free products, all-expenses-paid travel etc.
Cost per engagement (CPE)	Compensation is based on the level of engagement generated by the publication (e.g. likes, shares, tweets).
Cost per click (CPC)	Brand pays for consumer who has clicked on item linked by influencer to the brand.
Cost per acquisition (CPA)	Compensation is based on number of sales/subscriptions they generate for the brand.

Source: Own analysis (Q3 2017)



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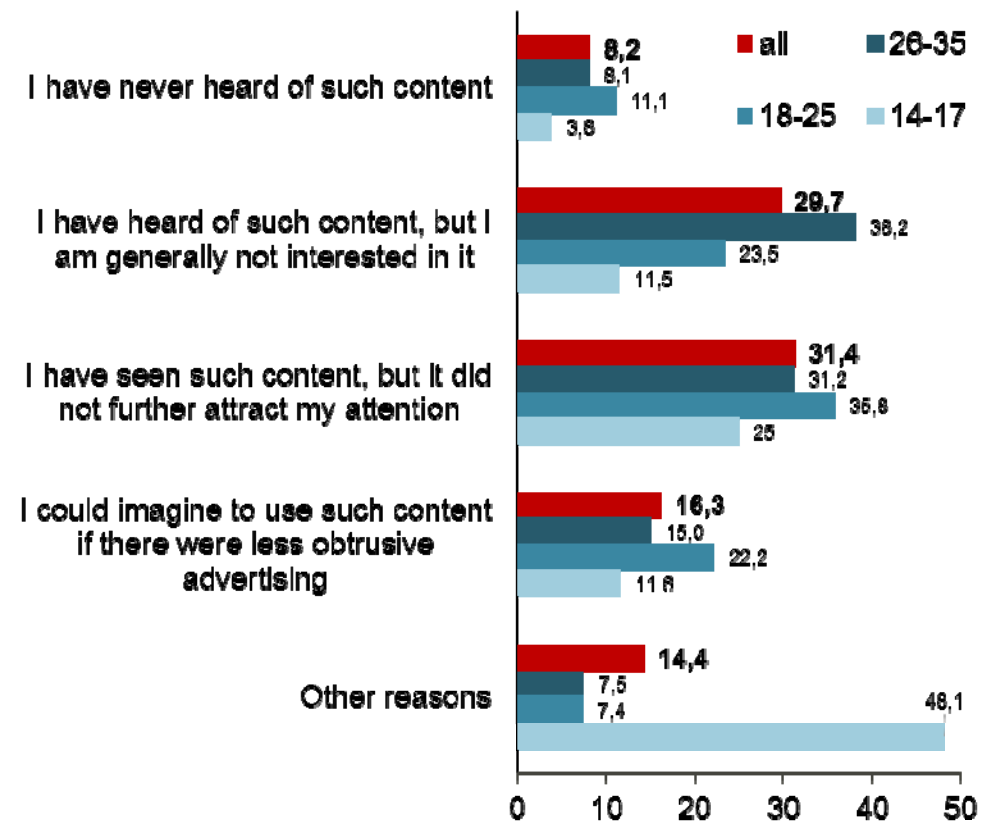
CONTENT

Reasons for no use of influencer content

General prevalence as well as reasons for non-use show clear age effect

The users show a clear age effect with the highest fraction at 83,6% among the 18-25 years old and a significant drop to 69,1% among the 26-35 years old. The slight drop also to the 14-17 year old with 81,6% can be explained by parental restrictions to the use.“

(Selected) reasons for no use (In %)



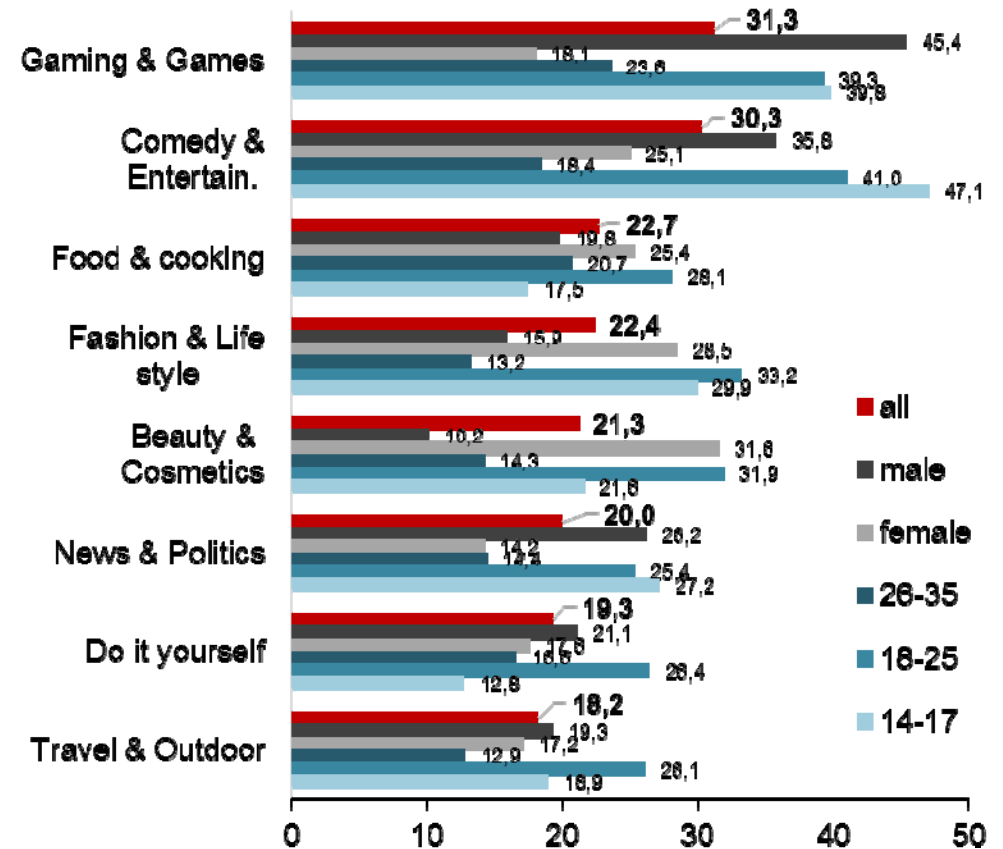
Source: Own survey; n=1000; German user; June 2017

Preferences for content categories

Social media celebrities' content is not restricted to specific categories

Our result clearly show that social media celebrities' content is not at all restricted to or even focused on specific content categories. Hence, it is a relevant competitor to all general as well as special interest traditional media players.“

Subscribing to at least one channel of the category (%)

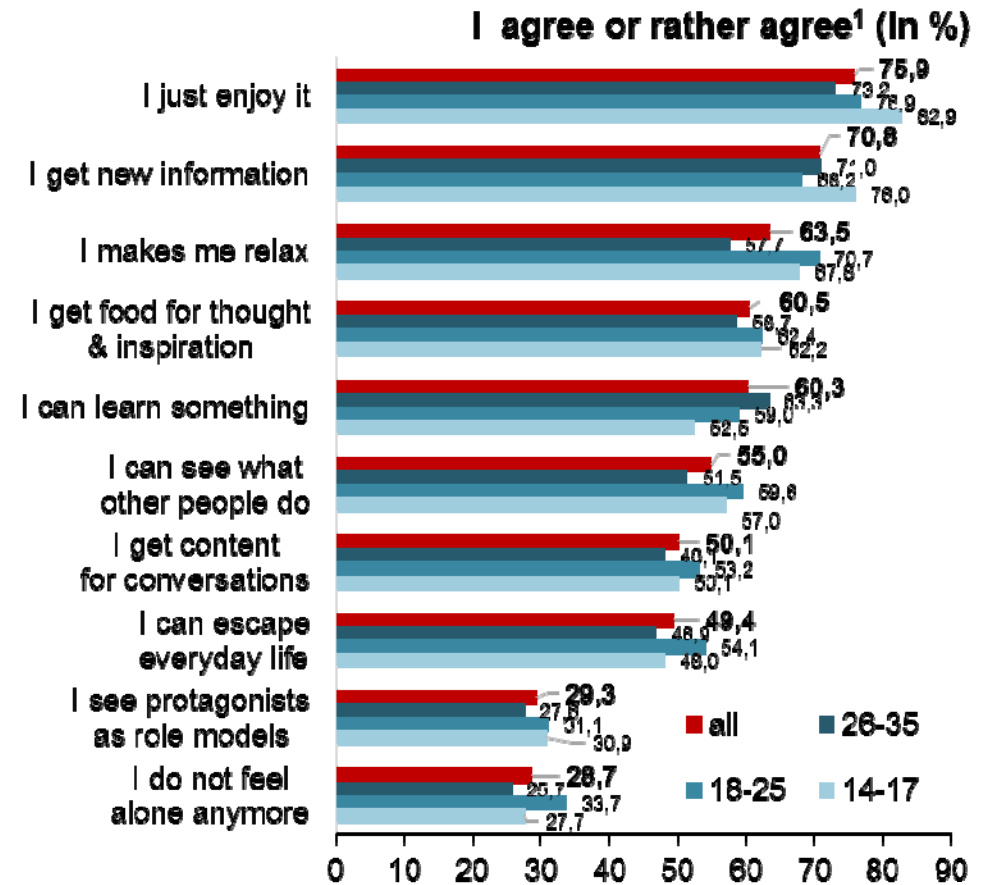


Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally YouTubers' video content

Motives for social media celebrities consumption

Users seek gratifications by the consumption of social media celebrities' content very much the same way as with traditional media content

Across all age groups (and gender) users search for enjoyment, followed by information interest and distraction sought.



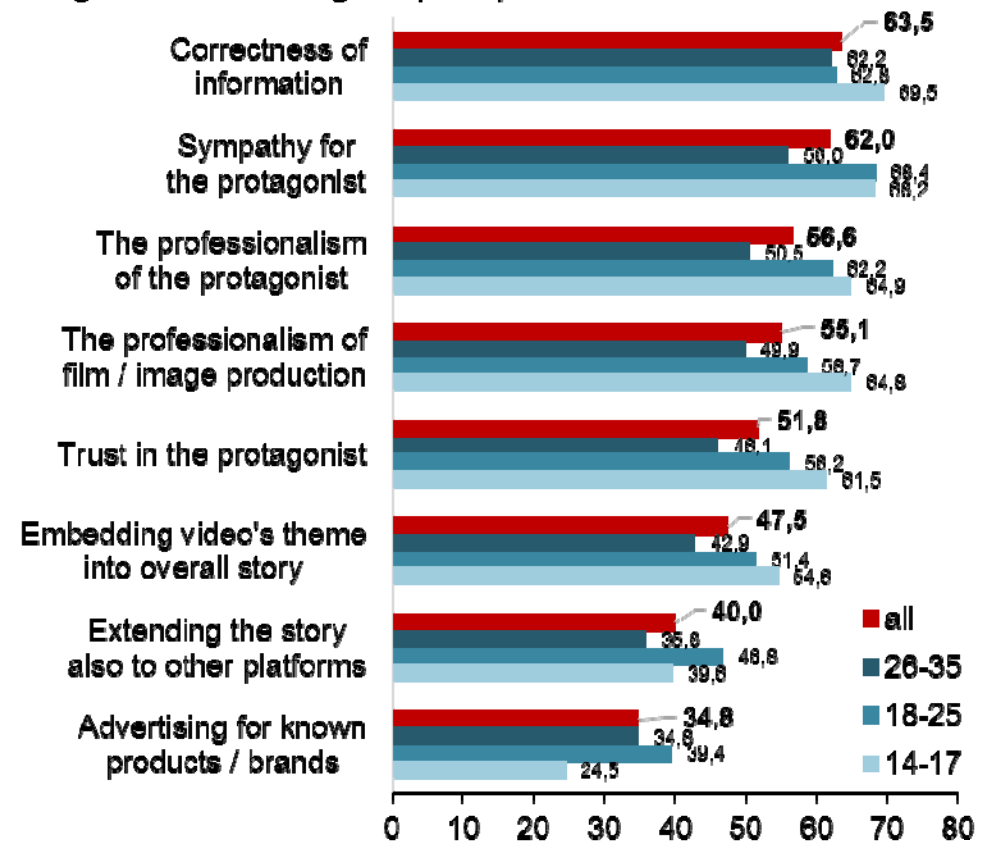
Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally YouTubers' video content; ¹ «Why do you use YouTubers' video content?»

Factors for high quality evaluation of YouTubers

Sympathy and trust are the key criteria for judging the quality of the content

„Information or facts given should be correct and „professionally“elaborated. Further, sympathy and trust in the protagonist seem essential. Obviously, this replaces the trust in a traditional media brand.

I agree or rather agree (In %)



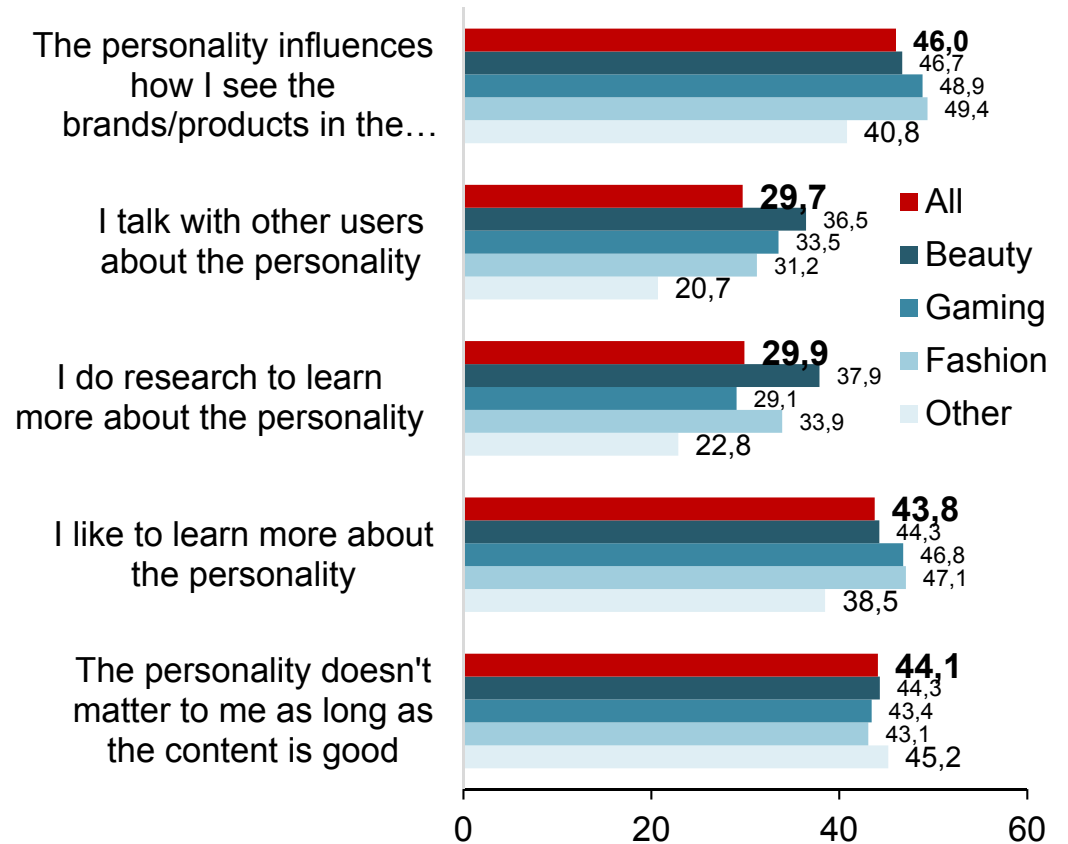
Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally YouTubers' video content; «How do you evaluate the quality of YouTubers' video content?»

Importance of YouTuber's Personality

As sympathy with a celebrity is an essential quality aspect, the personality counts

For a majority, the personality does matter regardless of the quality of the content. Over 40% would like to learn more about the personality. Although only a third would actively research more information on them.“

I agree or rather agree (in %)



Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally YouTubers' video content; «How important is the personality or the authenticity respectively of the social media celebrity to you?»

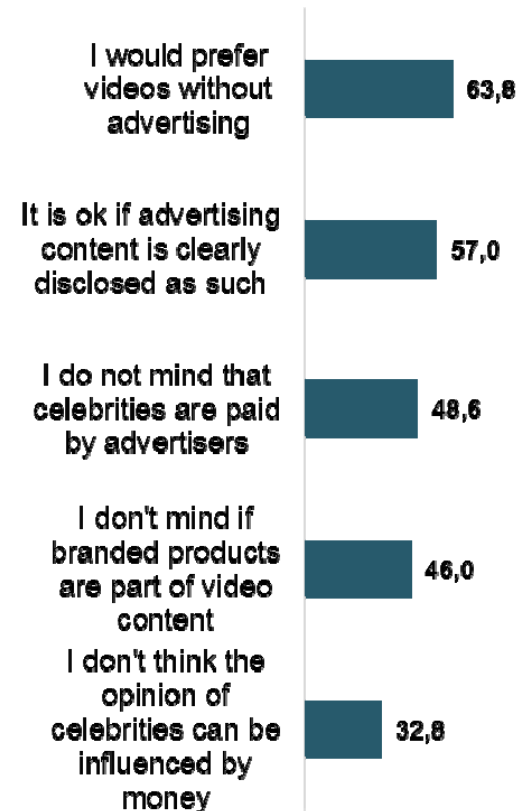
Perception of advertising from social media celebrities

Advertising is omnipresent, quite accepted, and impacting on purchase decisions

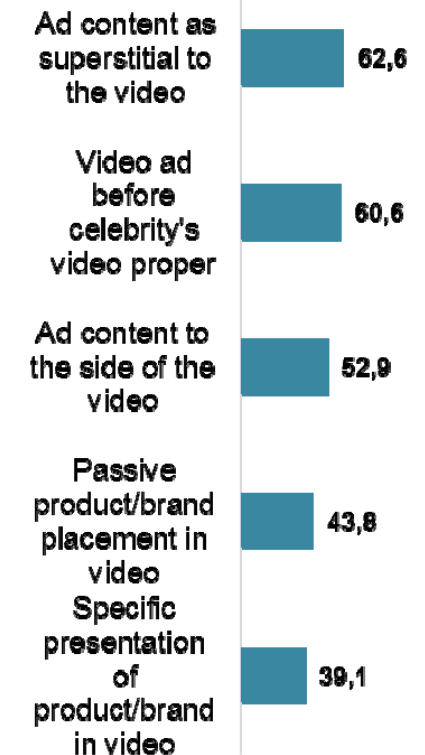
Although a majority would prefer videos without advertising, the specific presentation of brands/products in a video is seen as the least annoying form of ads.

About half of the users do not mind that the protagonists are paid and only a third thinks that their opinion is not influenced.”

I agree or rather agree (In %)



Annoyed by the following ad forms¹ (In %)



Source: Own survey; n=1000; German user; June 2017; all respondents who watch at least occasionally YouTubers' video content; 1 agree or rather agree



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Thank you for listening.

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