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The age of influence

How COVID-19 has propelled brands into the era of influencer marketing

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Contents

Foreword

Jason Mander
Chief Research Officer

Across virtually any commercial touchpoint, consumers increasingly want things on their own terms, suited to their own preferences. As researchers and marketers, our discussions around this simple fact have largely revolved around product features, advertising, and recommendations. But there's a more qualitative aspect of personalization at our disposal. How do you personalize how someone perceives and relates to your brand on a deeper level?

In a world where culture changes rapidly and new emerging interests can crop up beneath our radars in a flash, influencer marketing offers important ways of staying in tune with consumer expectations through the personalities at the heart of these cultures. Throw in a global health crisis which has thrust brands even closer to consumer needs, and it's not difficult to see why influencer marketing is becoming even more relevant by the day.

We're extremely pleased to partner with Influencer to understand influencer marketing's role in the future marketing landscape, drawing insights from our commissioned research, combined with previous coronavirus research to quantify and track major shifts in the consumer landscape.

Ben Jeffries
Chief Executive Officer

It has been clear to us for a long time that creators have become an integral part of people's lives. We rely on them for meal inspiration, for news updates, for morale boosting content and for product recommendations. We feel sad when they go through breakups, we relate to them when they discuss their mental health, we even feel proud when their children start school. And never has this been so clear as since the outbreak of the coronavirus. We have turned to our favorite creators to fill the void left by friends and family we were unable to see.

But the coronavirus hasn't created this "new normal" of more meaningful relationships between creators and consumers. It has simply propelled influencer marketing along the trajectory on which it was already heading. We are proud to partner with GlobalWebIndex to quantify the new normal of influencer marketing; to explore the creator-consumer relationships adopted during the lockdown and forecast which are here to stay; to examine and understand consumer purchasing behavior across a number of verticals; and to share our in-depth findings on the relationship between consumers, creators, and brands in 2020.

Introduction

There's no doubt that 2020 hasn't panned out how people, businesses, and governments expected. The outbreak of coronavirus has upended people's daily lives and businesses across the world.

However, in many countries, the initial acute phase of the coronavirus outbreak has passed and we're now entering a transitional phase; one where many countries are easing lockdowns, people are starting to return to work, and businesses are looking at ways to operate again.

As our attention turns to what comes next, we need to be pragmatic about the pandemic's material impact. In the context of consumer behavior, the coronavirus has been many things. It's been a disruptor and an agent of change, but most of all it's been an accelerant of existing trends.

Throughout our COVID-19 research, we've seen that when people are forced to abstain from the day-to-day routines they took for granted, they find new creative ways to gain fulfilment.

In many ways the pandemic has been a proof of value among consumers for many emerging trends we've tracked for some time. Digital connectivity has been the safety net in keeping society running, and as people have turned to online channels and platforms to fulfil their needs, they've also uncovered the benefits of using them.

Influencer marketing is a powerful example of this. For some time, we've seen a growing consumer sentiment expecting brands to have more of a voice and a personality. But under the extraordinary circumstances of the pandemic, qualities like empathy, authenticity, and compassion are now underpinning the brand-consumer relationship.

At a time when brand building and audience engagement is absolutely key, influencer marketing is giving brands an essential means to reach and engage audiences in ways which are meaningful and relevant to them, fulfilling their need for connection, and also building up a brand's position as we start to enter a new phase.

In this report, we'll leverage custom research in the U.S. and UK on influencer marketing alongside existing research on the coronavirus to dig into the impact the outbreak has had on consumers' behaviors, the effect on influencer marketing and the consumer-creator relationship, how purchase behaviors are changing, and how brands can successfully work with creators moving forward.

AUDIENCE DEFINITION

In a custom survey from May 2020, consumers who follow influencers are defined as internet users who say they follow content creators/influencers on social media. This definition rendered a sample of 1,056 (UK) and 1,038 (U.S.) internet users aged 16-64. Unless otherwise stated, all data in this report is among consumers who follow influencers.

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The age of influence

The impact of COVID-19

Social media usage spiked and it's set to last

During the outbreak, many consumers have undeniably had more time on their hands at home – largely because they've been restricted from doing their normal day-to-day activities.

As a result, consumers are turning to other forms of entertainment and finding new ways to occupy their time. This is clearly reflected in their social media behaviors.

In our custom influencer research, we found that **72% of consumers who follow influencers in the U.S. and the UK say they're spending more time on social media per day since the outbreak of coronavirus.** This peaks at 84% among Gen Z and is only a little lower for baby boomers at 68%, showing that time spent on social media has increased across all age groups. Men and women are equally likely to say they're spending more time on social media at 72%.

This is in line with earlier research we ran from March to May across 17 global markets, which showed consumers are spending more time consuming a number of different media. Consumers in the U.S. and UK in particular are spending more time watching shows on streaming services, watching more news coverage, and spending longer on social media.

Notably, consumers who follow influencers expect this behavior to continue. **Around two-thirds of this group say they're likely to continue using social media to the same extent once restrictions are lifted.** Interestingly, baby boomers are more inclined to say they're likely to continue using social media to the same extent than Gen Z; 69% of boomers say this compared to 57% of Gen Z who already use social media at high levels, suggesting increased usage of social media will be the new norm.

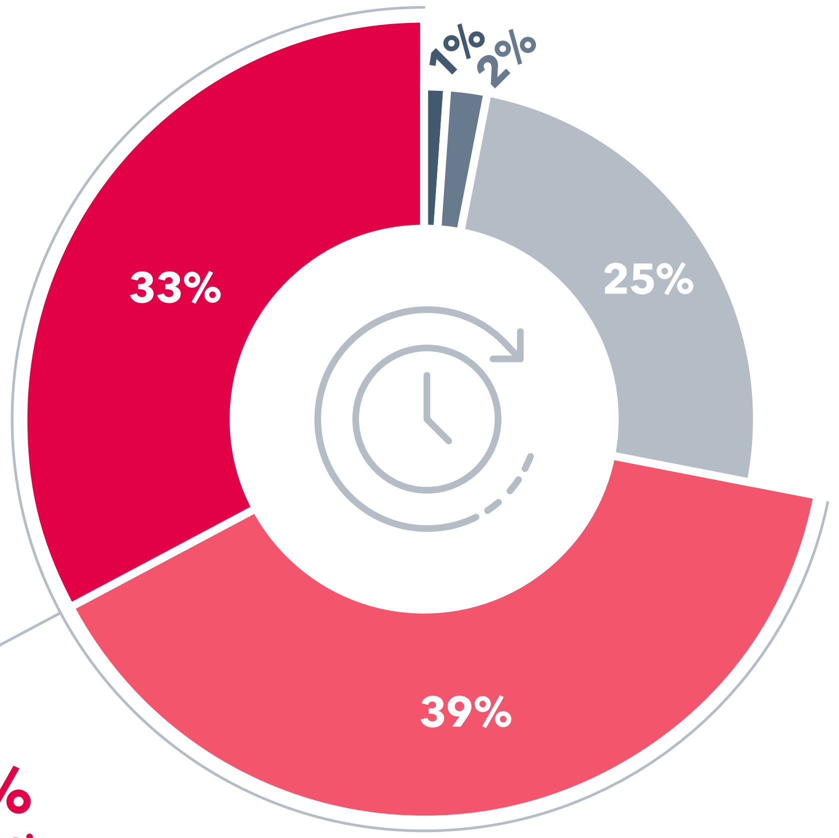
Two-thirds of consumers who follow influencers say they're likely to continue using social media to the same extent once restrictions are lifted

Social media has evolved into something more than simply passing the time or catching up with friends – it's now a place to consume entertaining content, to discover new products and services, and to interact with brands. This, alongside followers' intention to spend longer on social media presents more opportunities for brands and creators to reach and engage followers who are tuned in more than ever.

SOCIAL MEDIA USAGE SPIKES UPWARD DURING THE OUTBREAK

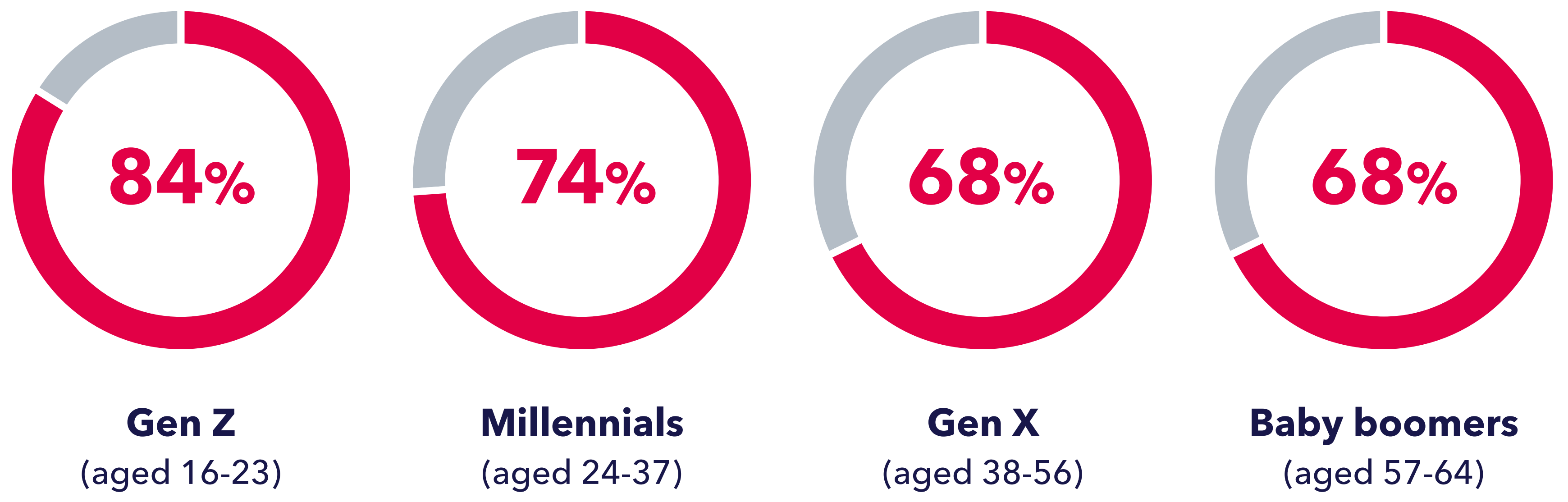
% of consumers who follow influencers that say they're spending more/less time on social media since the outbreak

- Much less time
- A little less time
- The same amount
- A little more time
- Much more time



72%
NET more time

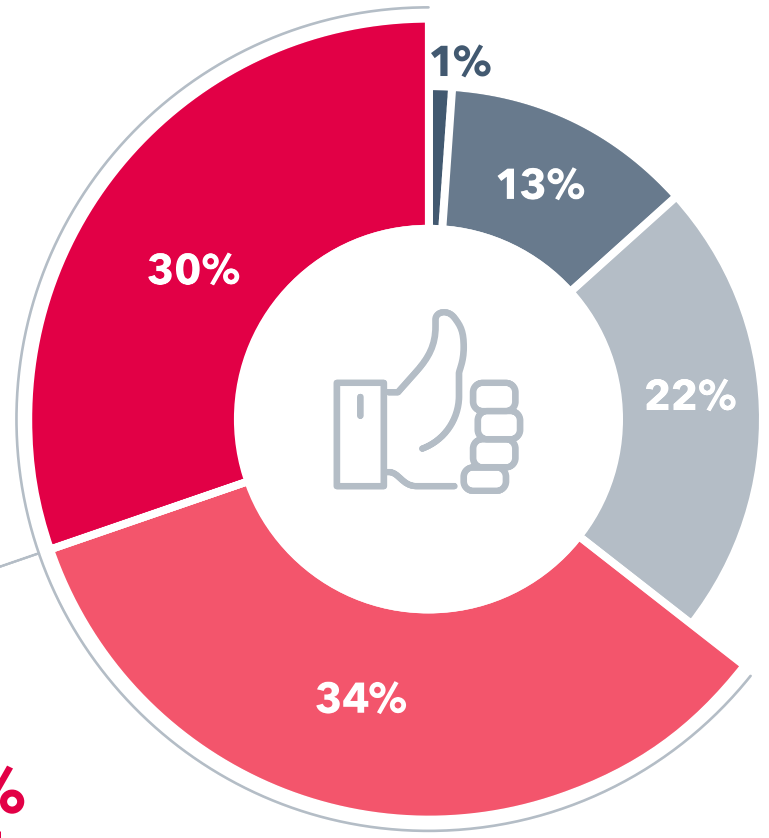
by generation



AND USAGE IS EXPECTED TO ENDURE POST-OUTBREAK

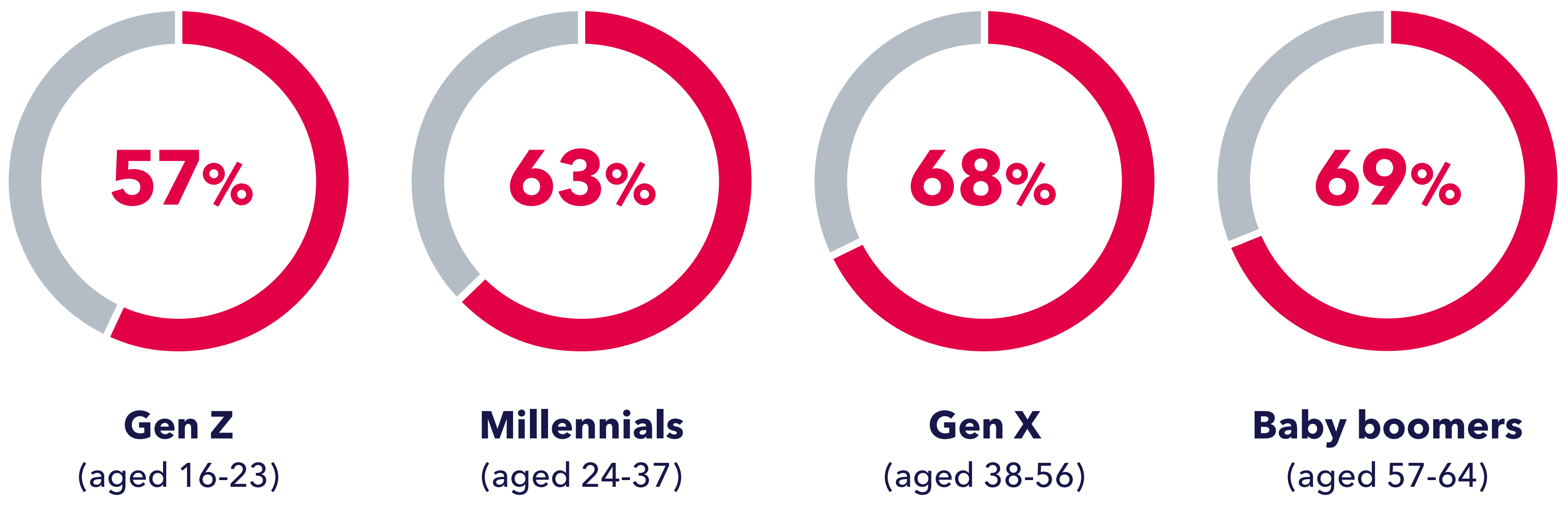
% of consumers who follow influencers that say they're likely/unlikely to continue using social media to the same extent once restrictions are lifted

- Very unlikely
- Somewhat unlikely
- Neutral
- Somewhat likely
- Very likely



64%
NET likely

by generation



Question: Since the outbreak of coronavirus, to what extent are you spending more or less time on social media on an average day? | Once restrictions are relaxed/ lifted, how likely are you to continue using social media to the same extent? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

Changing content needs

Digging deeper into how followers' content needs have shifted since the outbreak and which categories of creators are in demand, we find some interesting shifts that may have implications going forward.

Before the outbreak, the top creator categories across the U.S. and UK among consumers who follow influencers were food (45%), music (43%), news and current affairs (39%), and travel (36%).

Since the outbreak, categories like news and current affairs, food, physical wellbeing/fitness, and health food/nutrition have experienced the biggest growth in new followers.

Food influencers have proven their ability to keep us wanting more. Not only were food influencers the top accounts followed before the outbreak, but 26% of consumers also say they've started following food creators during lockdown – clearly showing the expanded reach of this category. From coronavirus research in May, we found that 40% of internet users in the U.S. and UK say they're spending more time cooking since the outbreak, highlighting opportunities for food brands and creators as people look for inspiration.

As might be expected, consumers are also turning more toward physical wellbeing and health food/nutrition categories. Around 15% of gym-goers in the UK and U.S. plan on canceling their gym membership post-lockdown. This isn't a financial response – the top income group are the most likely to say this. Instead, it's a mixture of safety concerns and a realization of the benefits of at-home workout routines.

The at-home fitness industry was gaining traction before the pandemic, with the likes of Peloton and Fiit making their way to becoming household names among fitness fanatics. But now we're seeing an acceleration of these trends as exercise habits gravitate away from gyms toward peoples' homes. Creators will be well positioned to capitalize on this and become an even more important pillar in the fitness industry.

From research at the end of March, we found that exercise was the top activity that consumers expect to continue doing more of after the outbreak is over. **40% of consumers globally plan to do this and it was the top activity for virtually every individual country, out of 20+ possible options.**

This is a clear sign that consumers generally have the appetite to stay healthier. It also suggests that consumers who follow influencers are likely to be open to initiatives that support them to achieve their health goals, which presents great opportunities for many different brands going forward and using creators will be a great avenue to help consumers achieve their goals.

TOP CATEGORIES OF CREATORS FOLLOWED BEFORE THE OUTBREAK

45%	Food
43%	Music
39%	News & current affairs
36%	Travel
33%	Health food/nutrition
33%	Physical wellbeing
31%	Technology
31%	Beauty/personal care
30%	Home and lifestyle
28%	Sports/outdoors

TOP NEWLY FOLLOWED CATEGORIES SINCE THE OUTBREAK

26%	News & current affairs
26%	Food
25%	Physical wellbeing
22%	Health food/nutrition
21%	Travel
21%	Music
19%	Home and lifestyle
19%	Technology
19%	Beauty/personal care
17%	Cleaning/hygiene

68% of consumers who follow influencers say they intend to continue following creators to the same extent after the outbreak ends

Question: Which of the following categories of content creators/influencers were you following on social media before the outbreak? | And which of the following categories of content creators/influencers have you started following on social media since/ during the outbreak? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

• TREND IN ACTION •

Superdry #FitnessMyWay – Adapting For Success

In January 2020, Influencer partnered with Superdry to launch their #FitnessMyWay campaign promoting the brand's spring/summer 2020 activewear collection. Superdry's mission was to work with creators to produce content that inspired their audience to achieve their fitness goals. Initially, Influencer worked with creators in the U.S., the UK, Germany, and France to share static Instagram content shot at the gym. However, as lockdown began, gyms were closed and there was a need to adapt. Influencer saw the popularity of Instagram Live rise and decided to change the focus of the campaign to Instagram Live content, which not only showcased the brands sportswear but also provided consumers with free fitness routines from their favorite creators. This helped to show consumers that Superdry understands their needs and it was also a great way to achieve the brand's mission to help consumers achieve their fitness goals – a win-win for everyone.

Content that resonates

We know the content categories that are making consumers tick, but what types of content do consumers want to see more of from the creators they follow?

Across the U.S. and UK, the types of content consumers who follow influencers want to see more of are how-to tutorials (40%), memes/funny content (37%), and short-form videos (33%).

There are some generational differences worth noting too. **The top content that Gen Z want more of are memes/funny content (45%) and behind-the-scenes looks at creators' lives (37%),** which is notably higher than other generations. Memes and funny content are also the first choice for millennials too. Memes not only provide humor when it's needed most, but also help consumers communicate and express themselves in a way that's relatable. Meanwhile, the top content choice for both Gen X and boomers is how-to-tutorials at 43% and 47%, respectively. How-to tutorials are considerably more important for older generations than Gen Z.

Reviews are also proving in demand across generations, reaching a high of 35% for Gen X.

And around one-third of Gen Z also want more question-and-answer videos compared to just over 1 in 5 of boomers, suggesting that Gen Zs enjoy the interactivity that comes with this type of content.

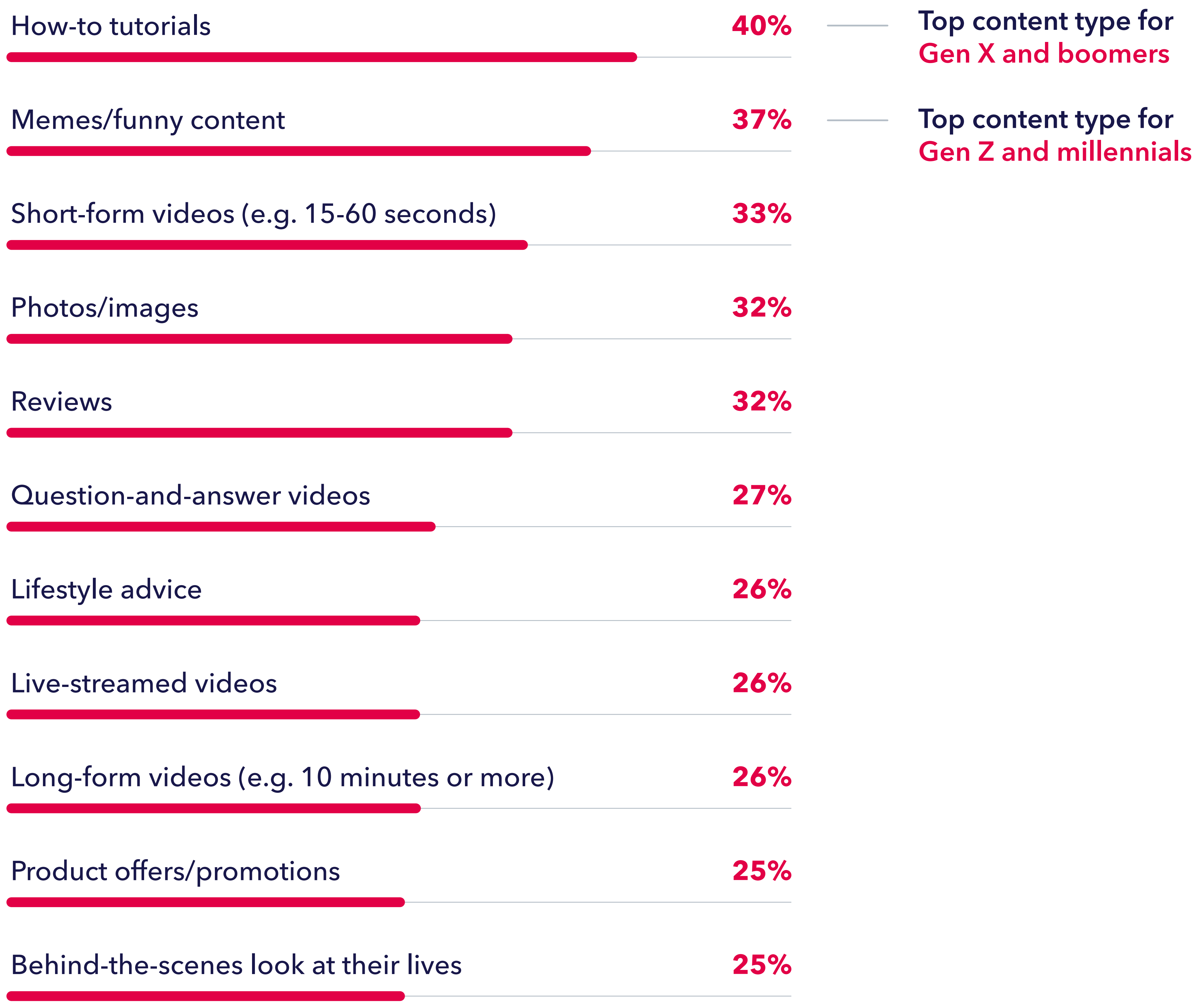
Memes/funny content is the top content choice for Gen Z and millennials

Consumers' need for more uplifting, humorous content is reinforced in our other research too. In May, we found that **65% of internet users in the U.S. and the UK approve of brands providing funny/light-hearted videos or content to entertain people during the outbreak.** Followers' desire for funny and positive content is something that's evident throughout this report, and brands and creators are a central part of this.

It's important for brands to really consider who their target audience is and the types of content they want to see more of, and then work with the right creators to effectively target audiences and maximize engagement.

WHAT TYPES OF CONTENT DO FOLLOWERS WANT MORE OF?

% of consumers who follow influencers that say they want to see more of the following content from creators



Question: What type(s) of content do you want to see more of from content creators/influencers that you follow on social media? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

02

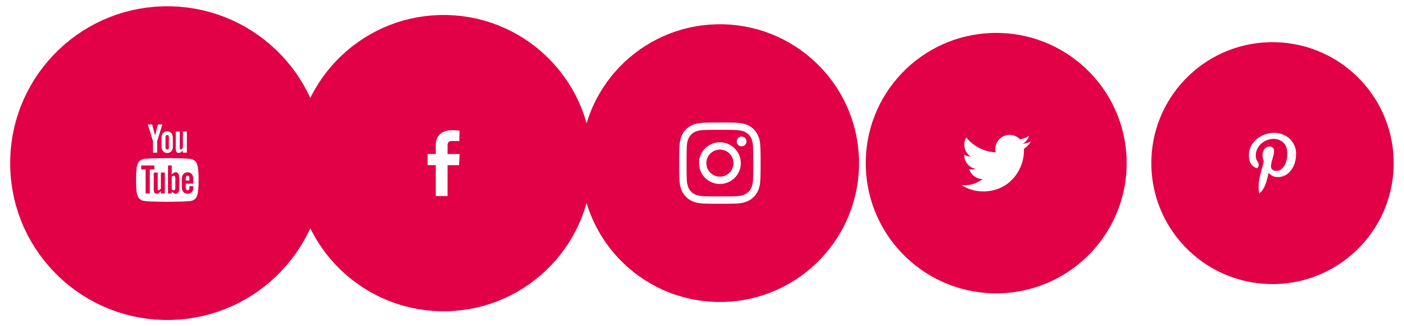
The age of influence

Staying relevant post COVID-19

Where does influencer marketing hold the most potential?

USED BEFORE THE OUTBREAK TO FOLLOW CREATORS AND STILL CURRENTLY USING

% of consumers who follow influencers that say they used the following platforms before the outbreak



74% 66% 58% 51% 44%

YouTube is the top platform used to follow creators by all generations

TOP PLATFORM THAT CONSUMERS HAVE STARTED USING SINCE THE OUTBREAK TO FOLLOW CREATORS

% of consumers who follow influencers that say they've started using the following platforms since the outbreak

TikTok

12%

38% of Gen Z say they used TikTok before the outbreak to follow creators and are still currently using

We also set out to understand the social media platforms that consumers who follow influencers used before the outbreak to follow creators/influencers and the platforms they started using since the outbreak.

Overall, the top platforms that this group used before the outbreak and are still using to follow creators are YouTube (74%), Facebook (66%), and Instagram (58%). For Gen Z, however, Instagram and Twitter take second and third place.

Interestingly, YouTube takes the coveted spot for all generations, reaching a peak of 80% among boomers and 78% among Gen Z. It's likely that the visual, video-based nature of YouTube and breadth of content is a key driver. Perhaps unsurprisingly, Facebook is considerably more popular among baby boomers at 75% compared to 48% of Gen Z. On the other hand, Instagram is way out in front for Gen Z at 71% compared to 47% for boomers.

Looking at platforms that consumers who follow influencers have started using since the outbreak, there's a clear winner here: TikTok. Around the world, people are jumping on the TikTok train and getting creative; producing funny videos, dances to the latest hits, and doing different "challenges", where users create videos attempting to do the same activity. Our data shows that TikTok is the top platform that followers didn't use before but have started using since the outbreak to follow creators. **10% of consumers who follow influencers in the U.S. have started using TikTok to follow influencers during the outbreak, rising to 17% in the UK.** As would be expected, TikTok usage jumps up most for younger generations. Close to 2 in 5 of Gen Z say they used TikTok before the outbreak and still use it to follow creators, followed by 1 in 5 of millennials. And since the outbreak, around 15% of both generations say they've started using the platform to follow creators.

We also asked those who said they've started using a social media platform since the outbreak how likely they are to continue using that platform after the outbreak ends. **Close to 80% say they would be somewhat or very likely to continue using the platforms they've started using.** Clearly, many of the platforms being followed now, like TikTok, aren't just a lockdown fad – they could have great staying power.

Question: Which of the following social media platforms did you use before the outbreak and/or are currently using now to follow content creators/influencers? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

The appeal of content creators

MAIN MOTIVATORS TO FOLLOW CONTENT CREATORS

% of consumers who follow influencers that cite these reasons for following content creators

51% To learn something new	**49%** For entertaining/uplifting content	**49%** To pass the time
43% Shared interests/passions	**38%** To gain inspiration	**37%** News updates
30% To learn about new brands/products	**27%** To feel motivated/challenged	**23%** To keep up with professional news
23% To do an activity (e.g. follow a workout)	**22%** To see their lifestyles/see things I can't see in real life	**14%** To get access to promo codes/discounts

So what are the reasons why consumers engage with creators? Across the U.S. and UK, **the main motivators to follow creators is to learn something new (51%), for entertaining/uplifting content (49%), or to pass the time (49%).**

Creators are usually people who are experts in their area, so it's no wonder that most consumers who follow influencers turn to creators to learn something new, whether that's a beauty tutorial, health and fitness advice, a new recipe, or home and lifestyle tips. And this is becoming even more important since the outbreak as followers' typical routines have changed.

When breaking it down by generation, we found that around 1 in 4 Gen Z also follow creators to do an activity, such as a workout for example, which has undoubtedly become more popular since the outbreak and, as we mentioned earlier, could see more long-term changes too. On the other hand, baby boomers are more likely to follow creators to get news updates (47%) compared to Gen Z (22%).

Importantly, creators also play a crucial role in building brand awareness – **30% of consumers who follow influencers say they follow them to learn about new brands and products,** which remains relatively consistent across generations and increases to 34% among women.

30% of consumers who follow influencers say they follow them to learn about new products and brands and 68% say they've researched a product/service after viewing a creator's post

Additionally, 68% of this audience also say they have researched a product/service after viewing a creator's post, showing that a creator's influence extends beyond brand awareness into the realms of consideration and purchasing. We'll discuss in more detail the role creators play in the purchase journey section.

Question: Why do you follow content creators/influencers? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

Expectations and changing role of brands

Next, we set out to understand the role of brands and what consumers who follow influencers expect from brands in the future.

We found that consumers who follow influencers **want brands to be informative (47%), to be a source of positivity (41%), to stand for something/have a purpose (37%), and to be more human/have a personality (35%).**

By generation, being informative is the top desirable action by millennials, Gen X, and baby boomers, while **Gen Z want brands to stand for something/be purposeful above all else.** This shows that **Gen Z in particular want brands to go beyond just providing information, and do more.**

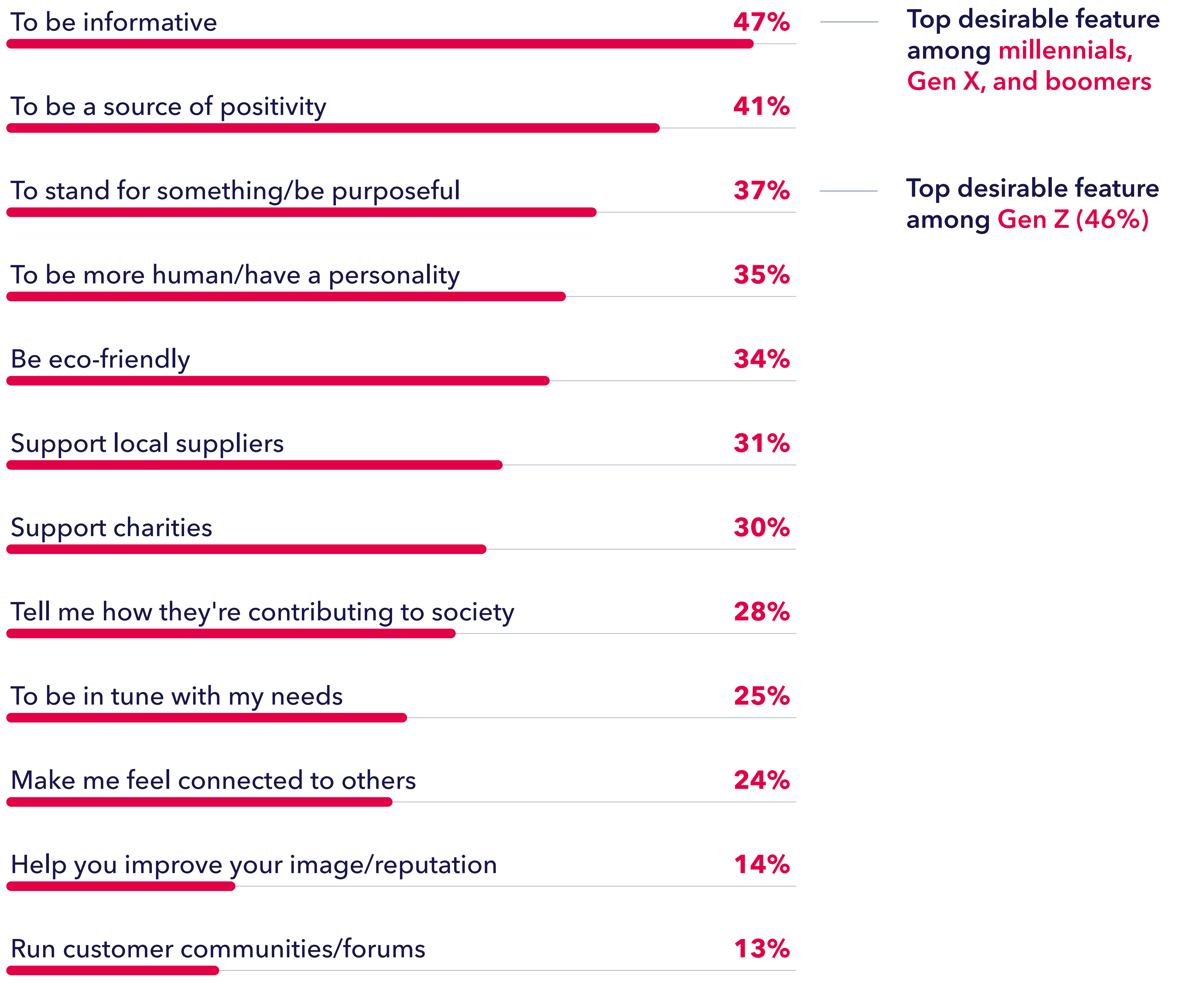
This isn't something which was born out of the pandemic; it's a sentiment that has been growing for some time. But under the circumstances of the pandemic and its economic implications, it's a sentiment which has been propelled. Younger generations are more likely to be negatively impacted by the current economic situation, and Gen Zs weren't old enough to remember the 2008 recession. Brands can establish a more meaningful connection by having a more human and personal approach, which we've seen is important across generations. In the face of financial struggles and an increased desire for brand purpose, creators help to give brands that empathetic and human element. As Gen Z increasingly composes the lion's share of the consumer base, building credibility now will pay dividends in the future.

What's more, in our coronavirus research in April, we asked consumers what factors will influence which brands/businesses they buy from after the outbreak is over. At the top, the most favored brands to spend money on are those that meet consumers' needs – this comes ahead of those with the cheapest prices, which shows the level of support that consumers feel they need at this time.

Additionally, **31% of internet users in the U.S. and UK say brands that helped during the outbreak would influence who they buy from after this is over. It's clear that consumers are looking to brands to lead the way.** Edelman's Trust Barometer research into trust and coronavirus tells a similar story; businesses are seen as leaders in the coronavirus battle. It's not just about supporting healthcare initiatives, which many brands and creators are doing, but going above and beyond to give some assurance or entertainment in troubling times.

FOLLOWERS EXPECT BRANDS TO BRING MORE TO THE TABLE

% of consumers who follow influencers that say they want brands to do more of the following in the future



Question: Which of these things do you want brands to do more of in the future? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

03

The age of influence

Building connections and trust

The emotional impact of creators during the outbreak

CREATORS OFFER SUPPORT AND A SENSE OF CONNECTION WHEN IT'S NEEDED MOST

% of consumers who follow influencers that say their favorite creators had the following emotional impact on them during the outbreak

Offered welcome distractions	44%
Helped me feel positive	43%
Provided a sense of normality	36%
Offered encouragement	33%
Provided a greater sense of community	26%
Offered relatable content to the situation we're in	26%
Provided insight into the current situation	25%
Provided a sense of companionship	23%
Helped me stay connected to my industry/professional network	17%
Influenced my post COVID-19 plans	14%

1 in 4 Gen Z say creators helped influence their plans after the outbreak

So we know what consumers who follow influencers are expecting from brands in the future. But what impact have creators had on this audience during the outbreak?

Just over 2 in 5 consumers who follow influencers in the U.S. and UK say that creators offered welcome distractions and helped them feel positive, which closely ties with what consumers expect from brands in the future too.

Additionally, around **1 in 3 Gen Z and baby boomers say that creators provided a greater sense of community** during the outbreak. During recent times, it's easy to see why people might feel more lonely or isolated, with many being unable to see family members or friends. As a result, **many people are turning to social media and messaging apps to fill this gap to stay connected and retain a sense of normalcy.** For some, this might even be their *only* form of communication and connection. Again, this closely links with followers' expectations of brands in the future with around 1 in 4 wanting brands to help them feel connected to others, highlighting that creators are a great way to do this.

A feeling of positivity peaks among Gen Z at 49% and among lower-earners at 46%. In earlier research from April, we found that mental health concerns are prominent in the U.S. and UK. For example, 30% of internet users in the UK and 21% in the U.S. are worried about their mental health getting worse at this time.

By generation, **Gen Z were the most concerned about their mental wellbeing at 26%.** Both Gen Z and lower earners were also more likely to report feelings of increased stress, panic, and loneliness during the outbreak. **This indicates that creators and brands can play a pivotal role by providing support to those who might need it most.**

Overall, we can see the hugely positive impact creators have had on followers during the outbreak. This could potentially have a knock-on, beneficial impact on influencer trust, highlighting just how important creators are in helping brands to meet consumers' changing expectations.

Question: What emotional impact did the creators/influencers you follow have on you during the outbreak? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

Most enjoyed and valued content from creators

Many creators have had to pivot from the typical content they usually provide. If you consider travel creators, for example, whose usual content might consist of traveling to different destinations – this simply hasn't been possible during the outbreak.

In speaking to creators, Influencer has found that many are pursuing new revenue streams and content strategies as a result of the pandemic. Whether that's diversifying themselves onto different platforms like YouTube and TikTok, or pivoting their offerings into alternatives such as print, illustrations, or paid Zoom sessions. Putting creators under the spotlight as social media engagement has increased has provided them with more opportunities to engage with their followers, and we're seeing developments of this in our research.

We asked consumers who follow influencers what types of content they've enjoyed the most from the creators they follow and, unsurprisingly, given what our data has shown already, **fun content like sketches tops the list at 40% – reaching a peak of 56% among Gen Z.** Fun content also remains the most enjoyed content across gender and income groups as well. Reinforcing this, **over half of consumers say they've valued the funny, light-hearted content they've seen from creators they follow.**

Gen Zs' second most enjoyed content is live question-and-answer sessions at 31%. Just over 1 in 4 Gen Z say they value the interactiveness that they've seen in recent creators' content, which is likely one of the primary reasons why this group enjoys Q&A sessions with creators. Similarly, 1 in 4 Gen Zs say they enjoy online classes like fitness workouts, dropping to around 1 in 5 for baby boomers. As we mentioned earlier, consumers are looking for alternatives to their usual gym workouts and creators can help to fill a big gap now and potentially in the future.

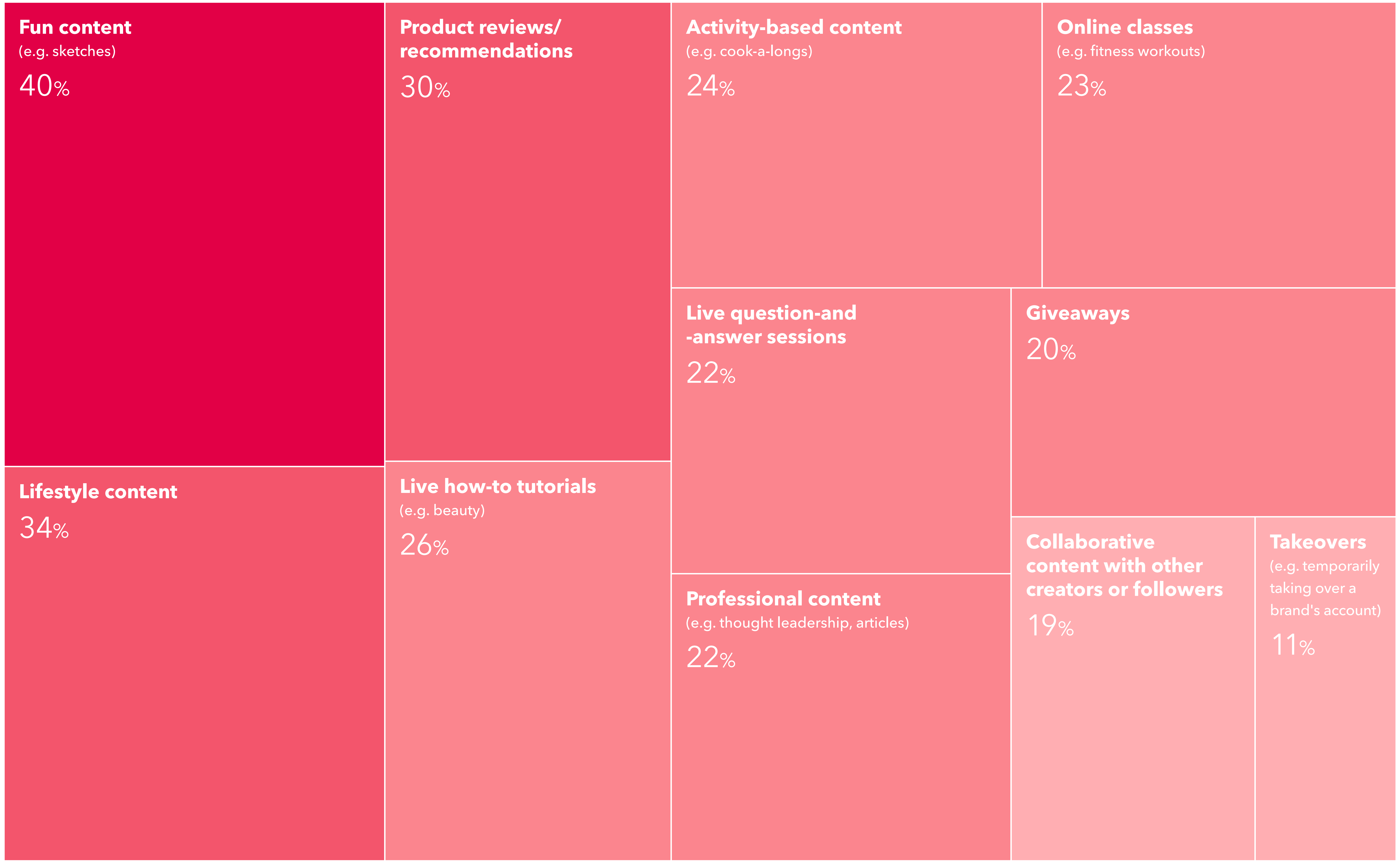
For baby boomers, it's really the pragmatic, practical content that they desire – **they're more likely than other generations to value informative content and for creators to provide helpful tips/suggestions.**

Interestingly, around **a third of millennials and Gen X enjoy product reviews/recommendations from creators they follow,** only dropping to 27% among boomers and to 21% among Gen Z. We've seen many brands express caution about marketing during this time and are perhaps unsure how receptive consumers might be. But from research in May, **we found that just over half of consumers in the U.S. and UK approve of brands advertising as normal.** And from our custom influencer research, we found that 58% of consumers who follow influencers agree that they don't mind if a brand partners with a creator or influencer right now. Consumers likely value a sense of normalcy, so it makes sense why this group values the product reviews they see from creators they follow, and highlights the benefits of using influencer marketing.

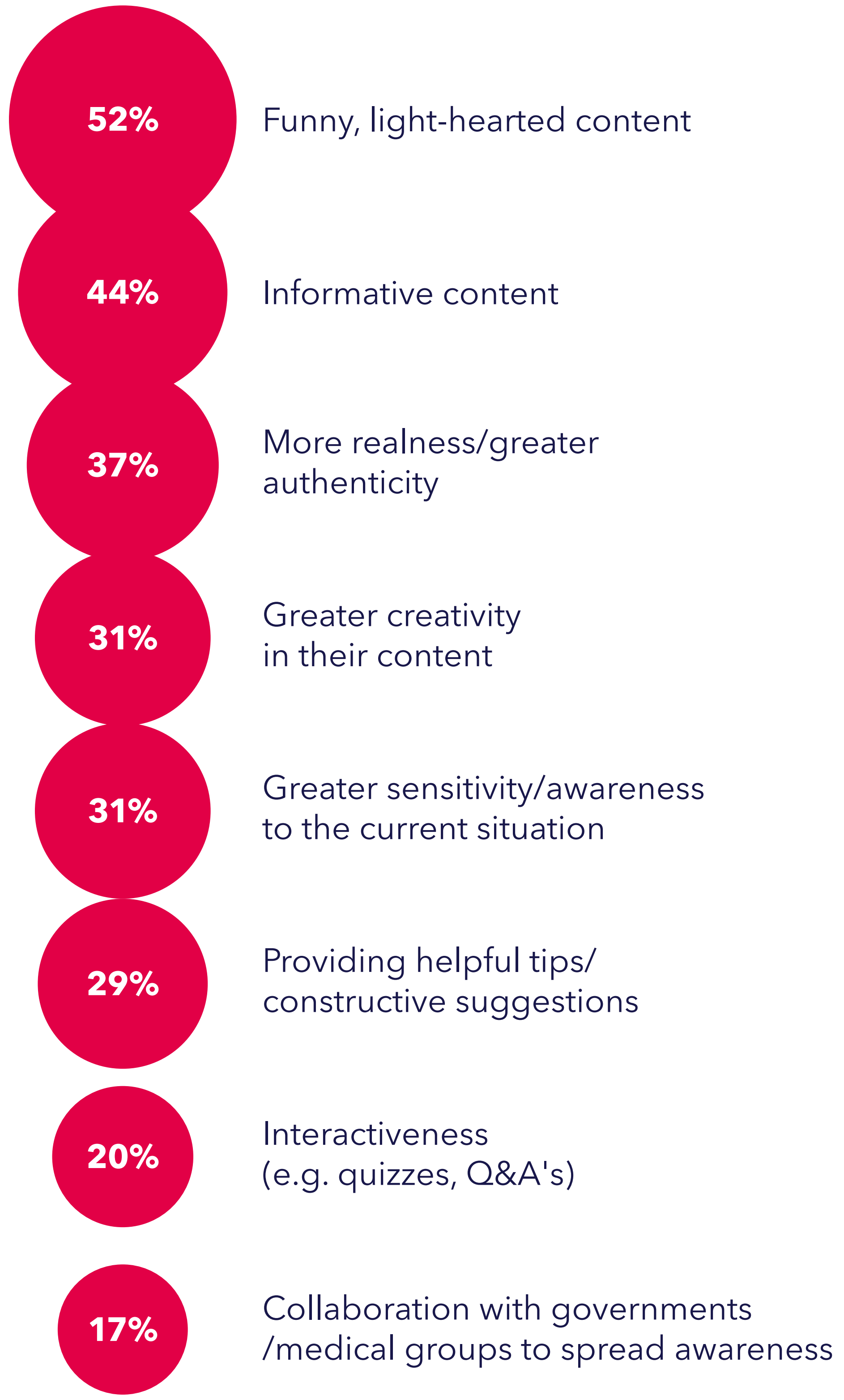
37% of consumers who follow influencers say they've valued the realness/greater authenticity in the recent content they've seen from creators

WHAT CONTENT HAVE FOLLOWERS ENJOYED THE MOST?

% of consumers who follow influencers that say they've enjoyed the following types of content from creators



AND WHAT HAVE FOLLOWERS VALUED ABOUT THE CONTENT THEY'VE SEEN FROM CREATORS?



Question: What types of content have you enjoyed the most from the creators/influencers you follow? | What have you valued about the recent content that you've seen from creators/influencers that you follow? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

Important creator qualities

Next, we explored the traits or qualities that are important for creators to have generally and which traits have become important since the outbreak.

Generally, the most important qualities or traits a creator should have are likeability (51%), humor (50%), creativity (48%), and trustworthiness (46%). There are some differences when we break it down by the types of followers. For example, among those who actively participate in creator content (take part in giveaways and quizzes), 46% say that creativity has become important since the outbreak compared to 37% of those who engage passively (when scrolling through their feeds).

There are also some interesting generational differences that come to light. **For Gen Zs, creativity is the top desired trait at 58%, while for millennials it's humor at 50%.** Meanwhile, for baby boomers, trustworthiness reaches a peak at 60%, making it their top desired trait. In comparison, around 38% of Gen Z and millennials cite trustworthiness as an important trait. Trust is still important, but there's clearly other traits like humor and creativity that these younger generations value more – which likely reflects their strong desire and engagement with entertaining content.

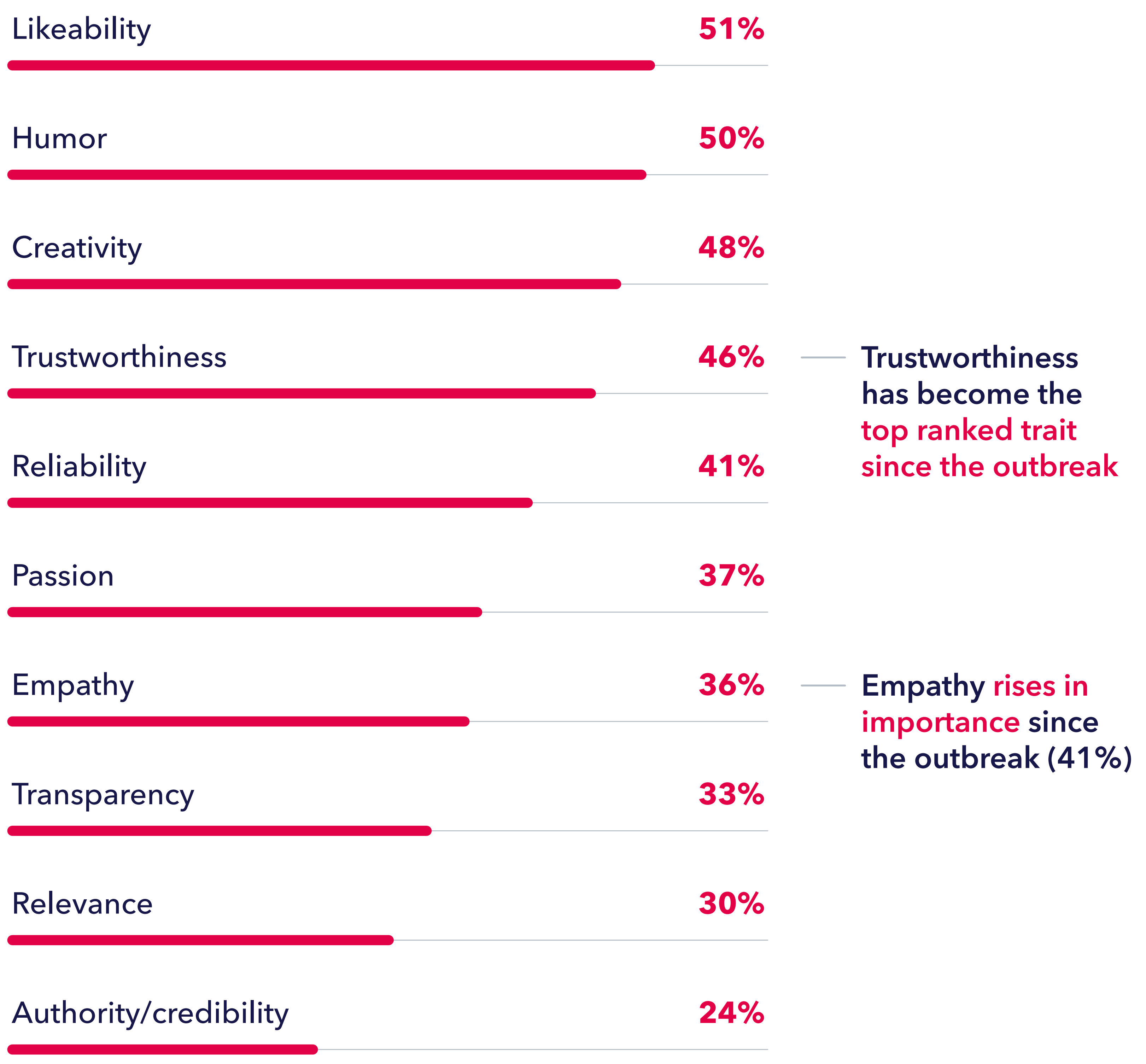
When we look at which traits have become important since the outbreak the ranking changes considerably, with trustworthiness at the top. It remains the top desired trait across gender and income brackets too.

We also see empathy become more important, especially among Gen Z. This perhaps shows the vulnerability that many people feel right now during these uncertain times and highlights their need for trustworthy information and greater compassion. People are being bombarded day in and day out with often contradictory information and are likely feeling quite weary. Now is the chance for brands to be the voices of reason and cut through all the noise – partnering with the right creators could be the way to do this.

56% of consumers who follow influencers say they look to creators/influencers to learn about brands/products and for honest reviews

LIKEABILITY AND HUMOR ARE IMPORTANT TRAITS GENERALLY, BUT TRUSTWORTHINESS IS THE TOP TRAIT SINCE THE OUTBREAK

% of consumers who follow influencers that say the following traits/qualities are important for creators to have generally



Question: Which of the following are important qualities or traits for creators/influencers to have generally? | And which of the following qualities or traits have become important since the outbreak? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

What does trustworthiness *really* mean?

In the world of influencer marketing, trust and authenticity are some of the most-used words. But there's a good reason for this. Trustworthiness is absolutely crucial to influencer marketing success – it's the backbone to building relationships with consumers. And as we've seen during the outbreak, trust has become even more paramount, especially as consumers try to navigate many unknowns.

But what does trustworthiness actually mean for consumers who follow influencers?

We found that **passion for the content creators promote, an in-depth knowledge about a product/service, and transparency about sponsorship** are the top most important features for creator trustworthiness. These features actually reach a peak of around 80% for baby boomers. And among those who say trustworthiness has become important since the outbreak, 84% say transparency about sponsorship is the most important.

For Gen Z, the most important aspect of trustworthiness is the effort creators make to build relationships with their followers, again highlighting how much this generation thrives off interactivity with creators – this is really key to engaging this group. Across genders and income levels, a passion for the content creators promote remains the top feature for creator trustworthiness.

On the other hand, consumers who follow influencers are more likely to say that **features like the number of followers they have and the number of likes/ comments a creator receives are somewhat or very unimportant** (37% and 33%, respectively). Baby boomers are more likely to say that the number of followers a creator has is unimportant at 47%, around 10 percentage-points more than other generations. Similarly, women are more inclined than men to say the same (42% vs. 32%, respectively).

This shows that more superficial features like follower count or number of likes are not important determinants overall for influencer trust. Instead, followers value a creator's passion for what they do, transparency about brand partnerships, and their knowledge of the product or service above all else. All of this shows how crucial it is for brands to make sure the creator is the right fit for their brand, by being selective and ensuring a creator closely aligns with their values.

Among those who say trustworthiness has become important since the outbreak, 76% say the effort creators make to build relationships with followers is important

WHAT MAKES A CREATOR TRUSTWORTHY?

% of consumers who follow influencers that say the following are very/ somewhat important for them when thinking about trustworthiness

74% **Passion** for the content they promote

73% **In-depth knowledge** about a product/service

Peaks at 80% among baby boomers

73% **Transparency** about sponsorship

68% The effort they make to build **relationships** with their followers

67% Knowing they **use** the product regularly

59% Content that's **personalized**

35% Number of **likes/ comments** they receive

33% Number of **followers** they have

Influencers followers are more likely to say these qualities are unimportant

Question: When thinking about what makes a creator/influencer "trustworthy", which of the following are important to you personally? (Very/ somewhat important) **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

How are followers engaging with creators?

CONSUMER-CREATOR INTERACTION

% of consumers who follow influencers that say they interact with creators in the following ways

When I'm randomly scrolling through my feed	41%
Actively watch their live videos	37%
Leave comments on their posts	34%
Actively watch their stories (e.g. Instagram)	34%
Watch long-form videos they create (e.g. IGTV)	26%
Take part in giveaways/contests	22%
Take part in their quizzes	19%
Tag them in content I post	15%
Send direct messages	15%
Use their hashtags	15%

Top ways that boomers interact with creators (41%)

1 in 4 millennials interact with creators in this way

People engage with creators in lots of different ways. Many followers actively interact with influencers; **37% say they actively watch their live videos and 34% leave comments on their posts and actively watch their stories,** while 41% of followers also engage with creators when they're simply scrolling through their feed.

Baby boomers appear to be one of the most actively engaged audiences. **They're most likely to say they interact with creators by actively watching their live videos or leaving comments on their posts at 41% for both.**

While around half of Gen Zs tend to engage with creators when they're scrolling through their feed, they also actively turn to creators' video content as well. Around 38% say they engage with creators by actively watching their stories on the likes of Instagram and 33% actively watch their live videos. This really highlights the importance of video-based content in engaging audiences of different ages.

Millennials are also more inclined to actively get involved and take part – they don't just purely consume content. Around 1 in 4 say they get involved in quizzes and take part in creators' giveaways/contests.

By gender, men and women are just as likely to say they actively watch creators' live videos at 37%, however women are more likely than men to say they interact with creators more passively when scrolling through their feeds (47% vs. 34%).

Additionally, we asked consumers if they're interacting with creators they follow more, less, or to the same extent as before the outbreak. The results are good news for brands and creators alike.

47% of consumers who follow influencers say they're interacting with creators more, while 49% say they're interacting the same amount – just 4% say they're interacting less. Among active participants (those who say they take part in giveaways and quizzes), 66% say they're engaging with creators more since the outbreak, compared to 49% of passive engagers (those who interact when scrolling through their feeds), highlighting how more creative, interactive content could encourage greater engagement. This further emphasizes the considerable potential for influencer marketing as a tool for brands going forward.

96% of consumers who follow influencers say they're engaging with creators more or to the same extent as before the outbreak

Question: How do you usually interact or engage with creators/influencers that you follow? Please select all that apply **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

04

The age of influence

The purchase journey

The impact of creators on brand discovery

At the beginning of this report, we highlighted how social media has moved beyond purely "social" activities and is instead becoming more of a one-stop-shop for consumers' daily needs. As a result of this evolution, we've seen social media become a space to discover new brands and to research products – and even complete purchases, which is something that Instagram and TikTok have made headway in.

We asked consumers who follow influencers how they typically find out about new brands/products, and we can see that social media plays a key role.

> **One-third of all generations say they discover brands through ads seen on social media**

Looking at it by generation, we can see that **around one-third of all generations say they discover brands through ads seen on social media.** Gen Z in particular are more likely to be discovering brands through social channels – 30% say they discover brands through recommendations or comments on social media, compared to 20% of baby boomers.

Unsurprisingly, older generations are more inclined to discover brands via ads on TV, however even among Gen X and baby boomers, ads seen on social media are a key source of brand discovery.

Gen Z are also much more inclined to discover brands through endorsements or recommendations from creators they follow at 28%, but this only drops to around 20% for all other generations. Interestingly, **Gen Z are just as likely to be discovering brands via creator recommendations as they are via search engines.** For brands, it's worthwhile noting that creator content also positively impacts SEO ranking. Moreover, for Gen Z discovering brands or products through creators is ahead of other means of brand discovery like ads seen before online videos or TV shows, consumer review sites, in-store promotions, and ads in magazines or newspapers.

Social media's role doesn't stop there either, it's also key for product research too. Using our global, quarterly research, **around 30% of consumers who follow influencers say they use social networks for product research.** All of this underscores the importance of social media and creator-based content in building brand awareness, especially among younger audiences.

CONTENT CREATORS AND BRAND DISCOVERY

% of consumers who follow influencers that find out about new brands/products/services via the following

	Gen Z (aged 16-23)	Millennials (aged 24-37)	Gen X (aged 38-56)	Baby boomers (aged 57-64)
Word-of-mouth from family/friends	46%	39%	45%	49%
Brand/product websites	33%	26%	32%	32%
Ads seen on social media	**32%**	**33%**	**33%**	**30%**
Recommendations/comments on social media	**30%**	**25%**	**28%**	**20%**
Ads seen on TV	30%	35%	44%	49%
Ads seen on websites	28%	24%	28%	29%
Endorsements from creators/influencers I follow	**28%**	**20%**	**22%**	**17%**
Search engines	28%	36%	40%	41%
Ads seen before online videos or TV shows start to play	22%	25%	20%	19%
Consumer review sites	19%	24%	29%	29%
In-store promotions	18%	25%	31%	31%
Ads in magazines or newspapers	15%	13%	22%	26%
Ads seen on music-streaming services	14%	12%	10%	7%
Ads/sponsored content on podcasts	13%	15%	11%	8%

Question: How do you typically find out about new brands/products? **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 141 Gen Z (aged 16-23), 804 millennials (aged 24-37), 910 Gen X (aged 38-56), and 239 baby boomer (aged 57-64) consumers who follow influencers

The value of discovering brands through creators

But what do consumers who follow influencers value about discovering brands through creators?

Our data shows that **4 in 10 of this group say that the value obtained from discovering a product through creators/influencers comes from seeing the product in action.** This is the top cited reason for all generations apart from Gen Z, with just 27% of this group agreeing. Instead, Gen Zs cite being able to find products they wouldn't have been able to find otherwise as slightly more valuable at 31%.

Ultimately, Gen Zs stand out from their older counterparts in that they recognize influencer marketing's unique ability to provide well-targeted products and services. This sentiment is reflected in them being less likely to say that influencer marketing's value comes from offers/promotions compared to other generations such as Gen X, but more likely to say that they trust the endorsement.

A similar observation is found when looking at this by gender. Women are more likely than men to say that influencer marketing's value comes from its practicalities such as being able to see the product in action (43% compared to 37%) or by providing offers and promotions (33% compared to 28%). On the other hand, men are more likely to see value in the connection between themselves and the influencer. **Around 3 in 10 men say the trust they have for an influencer endorsement is what they value about discovering brands via creators, making it one of their top choices and 27% say their values are reflected in the brand (compared to 18% of women).**

Interestingly, among followers who specifically discover brands/products through creators, the top two reasons for doing this are to see the product in action (58%) and to find products that they wouldn't have found otherwise (56%), with just 34% saying it was for offers and promotions. **This highlights influencer marketing's unique ability to advertise in a way that is welcomed by an audience, not for a financial incentive, but because they know it's well targeted and provides an authentic opportunity to see the product in action from someone they trust.**

Close to 2 in 5 followers who discover brands via creators say they value the trust that an influencer's endorsement brings

THE BENEFITS OF DISCOVERING PRODUCTS THROUGH CREATORS

% of consumers who follow influencers that say they value the following about discovering products through creators

Question: What do you find most valuable about discovering products through creators/ influencers? Please select all that apply **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

Purchase behaviors and intentions

Next up, we're going to explore followers' recent purchase behaviors and future intentions.

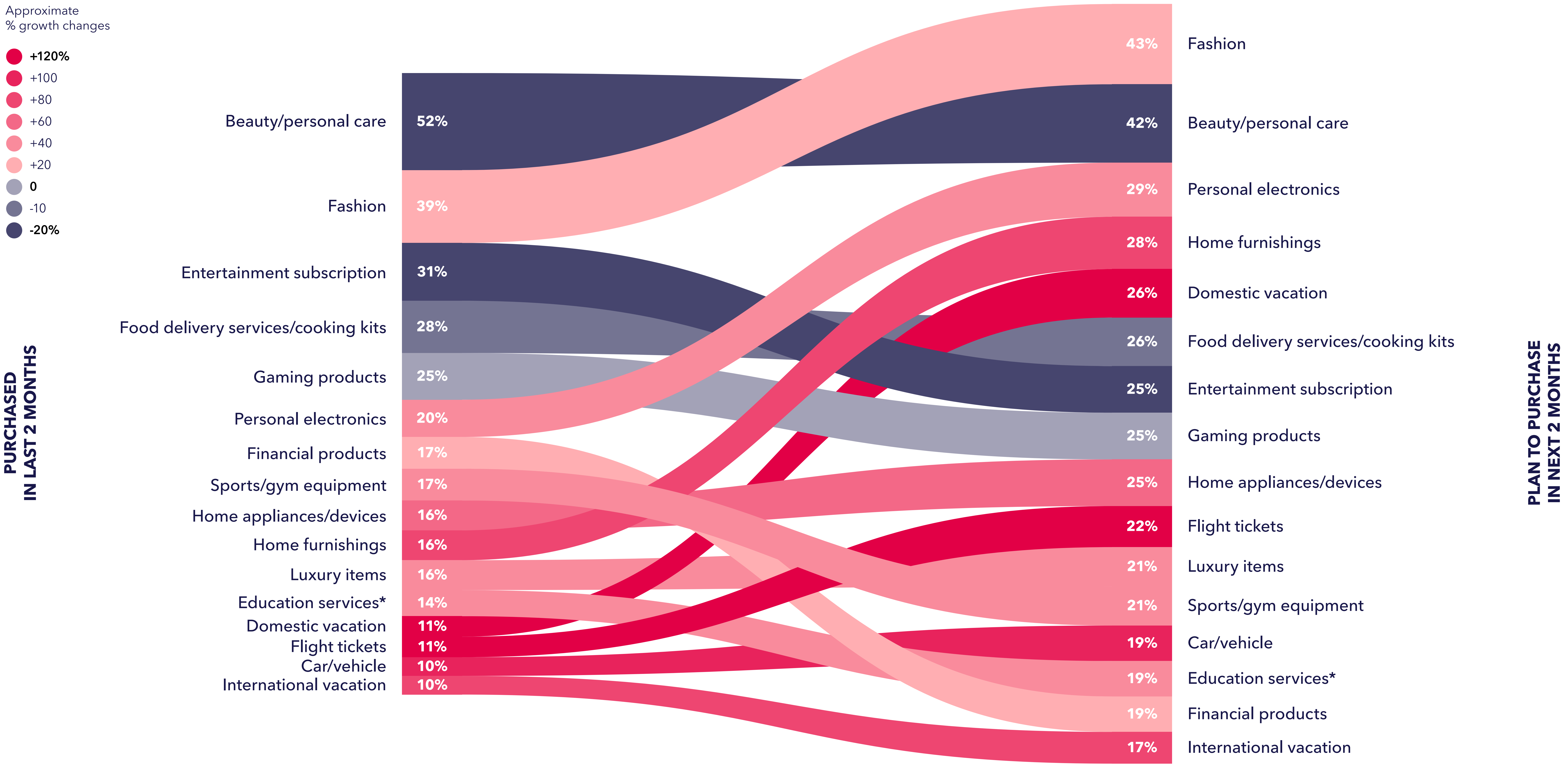
The outbreak has accelerated many existing trends at high-speed. CEO of OMD Worldwide, Florian Adamski, aptly summed up the **changes** we're seeing as a "turbocharged version of human evolution". One of these is online shopping, which is set to see a more long-term boost. From our coronavirus research in May, **around one-third of consumers in the U.S. and UK say they expect to shop online more frequently after the outbreak.** And from our April research, a similar percentage of consumers in the U.S. and the UK also expect to shop in-store less often once restrictions are lifted. This is likely down to safety concerns but also because the convenience of online shopping is becoming increasingly apparent – and consumers are getting used to it.

Many categories are set to benefit from this increase in online shopping, including food/grocery products, household essentials, personal care products, clothing, and personal electronics. In the context of the pandemic, it's important to remember that a key challenge for consumers in the face of disrupted supply chains and limited availability has been sourcing both the essential and non-essential categories they need online. Being an important bridge between consumers and products has given creators a unique position to overcome this challenge, ultimately reinforcing their importance as brand discovery and recommendation touchpoints.

Using our custom influencer survey, the top categories that consumers who follow influencers have purchased over the past two months are beauty/personal care (52%), fashion (39%), entertainment subscriptions (31%), and food delivery services/cooking kits (28%). Fashion and beauty/personal care also retain the top positions for future purchases as well, remaining high across generations, income levels, and gender. **Interestingly, beauty/personal care is the top category purchased by men and women over the past 2 months, highlighting this category's potential across gender.**

FOLLOWERS' PAST AND FUTURE PURCHASE CHOICES

% of consumers who follow influencers that have purchased/plan to purchase the following categories of products



*e.g. language course, training courses

Question: Which of the following categories of products have you purchased recently and/or are planning to purchase in the near future? Please select all that apply per row
Source: GlobalWebIndex Influencer Custom Research, May 2020
Base: 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers aged 16-64

We found **around a third of consumers who follow influencers have purchased an entertainment subscription, reaching 40% among Gen Z and making it their top category purchased.** Netflix and Disney+ have both benefited from social isolation. Netflix added **15 million** new subscribers within roughly 4 months this year and Disney+, which launched in November 2019, has already racked up **50 million** subscribers, growing much faster than its rivals did. A further 1 in 4 of this group also expect to purchase an entertainment subscription in the next 2 months, so even further growth could be on the horizon.

Similarly, from our coronavirus research in May across 20 countries, around 1 in 5 internet users globally plan to use food delivery services more frequently after the outbreak. Tying into this, around 40% of consumers globally anticipate they will eat out at restaurants less frequently after the outbreak. And from our influencer data, **close to 3 in 10 have purchased food delivery services/cooking kits in the past 2 months and 1 in 4 plan to purchase in the next 2 months.** This is yet another example of behavior that's expected to change more long-term and opens up a whole host of opportunities for food delivery and meal kit providers.

Learning platforms can also be expected to have a more visible presence in the future. From our coronavirus research in May, **close to 30% of consumers globally say they're spending more time on them during the outbreak, rising to 44% among Gen Z.** And, crucially, a fifth of this youngest cohort expect to continue this after the outbreak is over.

Additionally, **education platforms see an increase in purchase intentions too – around 1 in 5 of consumers who follow influencers say they plan to purchase education services in the next 2 months.** This demand is again mainly driven by Gen Z and millennials and highlights the potential for learning platforms going forward.

Among those who are interacting with creators more since the outbreak, 67% say they're more likely to consider a brand/product if their favorite influencer has promoted it

• **TREND IN ACTION** •

Travel purchases: onwards and upwards

The travel industry has been one of the most impacted by the virus, affecting everything from hotels, holiday rentals, to flights. From our coronavirus research, **purchases of vacations or trips continue to be the most delayed category since the first wave of our research in March,** overtaking categories like clothing, smartphones, luxury items and home appliances and devices.

And in our custom influencer research, purchases of domestic and international vacations and flight tickets in the last 2 months are comparatively very low at just 10% and 11%, respectively. Purchases of international vacations drop even further to 5% among baby boomers. Under normal circumstances, purchases would usually be higher. For example, from our quarterly global research in Q4 2019, close to 30% of U.S. and UK internet users said they purchased flight tickets in the last 3-6 months and 34% of UK internet users said they purchased a vacation abroad in that time frame.

However, when looking at what consumers who follow influencers plan to purchase in the next 2 months, vacations see a bounce back – focused mainly on staying closer to home, which is in line with findings from our other research. **Around 1 in 4 of consumers who follow influencers say they plan to purchase a domestic vacation in the next 2 months.** Higher earners are twice as likely as lower earners to say this (32% vs. 17%, respectively). Intention to purchase flights in the next 2 months also increases to 22% and international vacations increases to 17% among all followers.

Even though the industry has been turned upside down, vacations are clearly still front-of-mind for consumers, which is positive news for both travel brands and creators. From our coronavirus research in May, **we found that 23% of global internet users say they will prioritize purchasing vacations/trips after the outbreak is over, making it the number one category overall.**

Millennials are the most likely to plan to purchase an international vacation in the next 2 months (20%) compared to baby boomers (10%)

Purchase motivators

Next up, we explored what motivates consumers who follow influencers to make a purchase.

Overall, free delivery and offers/promotions come out on top, with over half of this audience selecting these options. This is pretty consistent for the average internet user generally.

Consumers are typically driven by practical, convenient, and tangible benefits, which is why features like discounts, free delivery, easy returns policy, and quick delivery are some of the most desirable features for consumers who follow influencers. It's also why features like lots of "likes" or good comments on social media fall to the bottom of the list. Instead, followers are motivated more by reviews from other consumers – **2 in 5 of this group cite reviews from other customers as a purchase driver.** The appeal of promotions and discounts also emerged in several places throughout our earlier coronavirus research. From our research in May, 57% of internet users across 20 markets who delayed purchasing a technology device say they will wait for products to be on sale. Approval of brands running promotions has also increased from 75% in March to 86% in May, suggesting a clear opportunity to drive loyalty and encourage spending through the use of offers – something creators can get behind.

Interestingly, **1 in 4 of consumers who follow influencers also said they're motivated to purchase if they feel that a brand/product "represents them", coming ahead of more environmentally and socially driven features.** This shows that followers are motivated by brands and creators that they feel closely align with their values and are relatable. This reinforces just how important it is for brands to build connections with this group, leveraging creators to do so.

Generally, consumers who follow influencers are more motivated by factors other than endorsements by creators they follow. However, when looking at followers who say they discover brands via creators/influencers, we really see a creator's impact come to light. **Around one-third of this group say they're motivated to make a purchase via an endorsement by a creator or influencer they follow.** This shows just how important it is to engage followers effectively at the awareness phase, because it translates to higher levels of action at the end of the purchasing funnel.

TOP PURCHASE DRIVERS

% of consumers who follow influencers that say the following has/would motivate them to make a purchase

	All influencer followers	Influencer followers who discover brands via creators
Free delivery	57%	63%
Offers/promotions	52%	65%
Reviews from other customers	41%	53%
Easy returns policy	39%	44%
Quick delivery	34%	42%
Finding a brand/product that I feel represents me	23%	30%
Knowing the company is environmentally friendly	22%	31%
Knowing the company is contributing to society	20%	29%
Knowing that a share of my order will support a cause	18%	25%
An endorsement by a creator/influencer I follow	**15%**	**32%**
Lots of "likes" or good comments on social media	14%	21%

Among those who are interacting with creators more since the outbreak, 69% say they have purchased a product/service because of a creator's recommendation

Question: Which of the following has/would motivate you to make a purchase? Please select all that apply **Source:** GlobalWebIndex Influencer Custom Research, May 2020 **Base:** 1,056 (UK) and 1,038 (U.S.) consumers who follow influencers and 209 (UK) and 220 (U.S.) consumers who follow influencers who discover brands via creators aged 16-64

05

The age of influence

Key takeaways

What does this all mean for brands?

Ø1

Time on social media has increased, and it's expected to last

Using our custom influencer research, we found that 72% of consumers who follow influencers in the U.S. and the UK say they're spending more time on social media per day since the outbreak of coronavirus, remaining high across generations. Additionally, around two-thirds of this group say they're likely to continue using social media to the same extent once restrictions are lifted. Social media has evolved into a place where consumers are now discovering new products and services, researching products, and interacting with brands. All of this provides significant opportunities for brands to work with creators and reach these tuned-in consumers.

Ø2

Content needs are changing, and so are behaviors

Since the outbreak, consumers who follow influencers are turning more toward following certain types of creators – two of these categories are related to health and wellbeing. As a result of gym closures, consumers are forced to find new ways to exercise and are more focused on both their physical and mental wellbeing during such uncertainty, which is also why we're also seeing a big demand for positive, humorous content. This all highlights a clear appetite to stay healthier and also means that followers are likely to be open and welcoming of initiatives that support them in achieving their health goals. This presents opportunities for many different brands going forward, from sports and fitness brands to health and nutrition brands – and partnering with the right creators could help brands to support consumers in achieving their goals.

Ø3

Consumers want brands to do more

A brand's role is so much bigger than just simply providing a product or service, and consumers generally expect more too. From our custom influencer research, we found that consumers who follow influencers want brands to be a source of positivity, to stand for something/have a purpose, and to be more human/have a personality. From our coronavirus research in April, we also found that consumers are most inclined to spend money after the outbreak on brands who meet their needs and on brands who helped during the outbreak. This not only shows the level of support consumers need but it's also a clear sign that they expect brands to lead the way. Brands can leverage the unique personalities of creators to really bring in a more empathetic, supportive, and human element to their brand, which will become even more important in the future. Sitting back or standing still isn't an option.

04

Creators are seen as pillars of support

Throughout our research, we can see the positive impact creators have had on their followers during the outbreak. Just over 2 in 5 of consumers who follow influencers in the U.S. and UK say that creators offered welcome distractions and helped them feel positive, which is closely tied with what consumers expect from brands also. Consumers are craving a break from the doom and gloom and both brands and creators can work together to provide this. Additionally, around 1 in 4 of this group say creators provided a greater sense of community during the outbreak. Again, this links in with followers' expectations of brands in the future with 1 in 4 wanting brands to help them feel connected to others. All of this highlights just how important creators are in helping brands to meet consumers' changing expectations.

05

Trust becomes vital during the outbreak, but it's not determined by follower count or likes

Trustworthiness is the top quality that followers say has become important since the outbreak. Alongside this, we can also see empathy is more important since the outbreak, especially among Gen Z. This shows the vulnerability of consumers during these uncertain times and highlights followers' need for trustworthy information and greater compassion. But what makes a creator trustworthy isn't down to the number of followers or likes they have, it's mainly for their passion about what they're promoting, their knowledge about a product/service, and their openness about sponsorship. Being selective and partnering with a creator that fits a brand's values can really help to promote greater trust and connections with an audience.

06

Creators play a key role in the purchase journey

Social media forms a crucial part of how consumers discover and research products and services. For consumers who follow influencers, around 30% of Gen Z say they discover brands through endorsements or recommendations from creators they follow, this only drops to 20% for all other generations. Interestingly, Gen Z are just as likely to discover brands via creators recommendations as they are via search engines, highlighting the considerable potential of creators at the start of the funnel. Consumers who follow influencers particularly value seeing the product in action from creators they follow. Social media is also key for product research too – using our quarterly global research, around 30% of followers say they use social networks for product research. All of this underscores the importance of social media and creator-based content in the purchase journey.

07

Followers' purchase behaviors show considerable potential for certain categories

Throughout the outbreak, we've seen consumers adapt their behaviors. They're shopping online more, and expect it to last after the outbreak; they're consuming more media content; they're cooking more often at home, and intend to visit restaurants less once restrictions are lifted; they're practicing more distanced learning – to name just a few. As a result, many categories are set to benefit. From our data, consumers who follow influencers have purchased products in beauty/personal care, fashion, entertainment subscriptions, and food delivery services/cooking kits the most over the past 2 months. And for future purchase intentions, we can see that education platforms are on the agenda for around 1 in 4 of this audience. Similarly, travel is also likely to experience a bounce back as intention to purchase vacations and flights increases.

Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

SAMPLE SIZE BY MARKET

Unless otherwise stated, the data in this report is taken from a custom survey from May 2020 among 1,056 (UK) and 1,038 (U.S.) internet users aged 16-64. Please note, where clearly stated, this report also draws insights from GlobalWebIndex's custom coronavirus research from March to May and our ongoing global research. Our coronavirus research can be accessed on our website **here**. There you can find whitepapers, blogs, and webinars on the coronavirus outbreak.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

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