UK Influencer Survey 2020

vuelio make your story matter

Contents

THE GLOBAL INFLUENCER MARKETING INDUSTRY

ESTIMATED TO BE WORTH

$5.5bn

AND FORECAST TO **GROW** TO

$22.3bn

by 2024

Foreword

The global influencer marketing industry is currently estimated to be worth $5.5bn and forecast to grow to $22.3bn by 2024, according according to *Markets and Markets (2019)*

The industry originated from hobbyist bloggers writing diary-type posts and has evolved to a point where multi-millionaire influencers create myriad content across their own platforms, social media channels and podcasts.

This year, we've evolved this report from what in previous years was the UK Bloggers Survey into the Influencer Survey. While we've been able to effectively track some trends right back to our first publication in 2016, this year includes new data to better reflect the entire influencer marketing industry.

The breakdown of compensation is one such area we've expanded on for 2020. This year we have included average rates charged alongside the breakdown of which channels demand the highest fee. This reflects the continual rise of the professional influencer, which is at its highest point since we started the Survey.

With this rise in professionals, there is a growing need for regulated standards. Self-policing is still the norm despite guidance from the CMA and ASA, and rulings to clarify what is and isn't acceptable practice. Vuelio partnered with the CMA in 2019 to publish *Influencer Marketing and the Law,* which outlines current guidance.

The influencers are, of course, only one side of this industry and the other is still being determined by warring factions. Before the dominance of social media and paid-for content became the norm, PRs were influencers' natural bedfellows. Firmly part of the earned media mix, influencers soon realised their worth and, not supported by big publishing companies, sought funding for their work, shifting the brand balance to marketing teams with deep(er) pockets and ownership of paid.

As social media, and in particular Instagram, has started to dominate the space, the focus has shifted again to social media agencies and, most recently, bespoke influencer marketing firms that have select rosters of influencers and broker deals directly.

But the battle isn't over, and each organisation that has played a part can still help shape the future of the industry. The #FuturePRoof publication *We're all influencers now* makes a solid case for PR to once more take the lead and work with the influencers to create the bodies and structure the entire sector desperately needs.

This Survey was designed to help everyone working in influencer marketing to better understand current practice and use this insight to improve. The influencers are all part of the Vuelio network but have filled in this survey anonymously, and largely before the current lockdown measures were introduced. To reflect this, we've also spoken to influencers for a qualitative assessment of the current COVID-19 crisis and how it is affecting the market.

We're indebted to Canterbury Christ Church University and Kristine Pole for once again partnering with us.

We hope you find the results both insightful and valuable.

Influencer marketing during the global pandemic

As the Influencer Survey was conducted largely before the world went into lockdown, most of the results don't reflect the temporary arrangements we all find ourselves in. To understand this 'new normal' – however long it lasts – we spoke to influencers about COVID-19 and how it is affecting their content, audience engagement and commercial relationships.

Everything is impacted, but some industries have been hit harder than others

For most influencers, their work changed in the immediate aftermath of the lockdown regulations as commercial agreements were frozen by brands who hit pause on their marketing efforts.

This was felt by *Slummy Single Mummy's* Jo Middleton who said: 'Of the projects in progress or about to start when the crisis hit, at least half were cancelled or dramatically reduced.' As well as Sabrina at *Severn Wishes blog:* 'Any commercial relationships that were meant to be happening during this time have been postponed or I simply haven't heard back from some of them'.

> 'Any commercial relationships that were meant to be happening during this time have been postponed or I simply haven't heard back from some of them.'
>
> Sabrina
> *Severn Wishes blog*

In some industries, the impact is still evolving alongside the latest Government and global regulations.

Travel bloggers Lloyd and Yaya from *Hand Luggage Only* said: 'Most commercial relationships are on hold right now. In the longer-term, we still have projects in the pipeline. That being said, there is a need for flexibility in this 'new normal' and how we work with commercial partners.'

While a wedding influencer said: 'The majority of our clients' businesses have effectively been wiped out for the year and spending bans have been imposed until they know when events will be able to return.'

Traffic is up

While commercial partnerships may have initially paused, traffic – to blogs in particular – has increased as more people are spending time online throughout the day.

John Adams of *Dadbloguk.com* has seen this uplift but has had to adapt his content to keep up with his audience's changing interests. He said: 'The content that was popular on my blog changed overnight. Various lifestyle and motoring articles that accounted for a sizeable chunk of my regular page views became less popular. They were instantly replaced with articles focused on education, health, mental health or uplifting interviews I had done with celebrities.'

> 'I feel more connected to the proportion of my audience I have been able to reach.'
>
> Elle Linton
> *Keep it simpElle*

The same is true for Elle Linton of *Keep it simpElle*, who initially stopped creating content to adjust her strategy and focus more on the authentic and reliable: 'Since lockdown, I've been teaching online fitness classes as I can no longer do that in a gym and it's opened up two-way communication with my audience. I've found engagement has improved on my Instagram main feed (albeit not what it used to be back in the day) and I feel more connected to the proportion of my audience I have been able to reach.'

> 'We've been getting hundreds of votes and the results are very interesting, not to mention, a conversation starter.'
>
> Craig Landale
> *Menswear Style*

Just as organisations in certain industries had to adapt quickly to the new environment, their corresponding influencers also needed to keep pace. One such example is Craig Landale's *Menswear Style*, which is positioning its content around the current lockdown and gathering audience feedback that will be useful for fashion brands: 'We've been putting out a lot of Twitter polls on the subject of the current situation e.g. "Are you still getting dressed?", "Will you shop more with brands that have helped with the fight against COVID-19?" and "Will you continue to shop online more after lockdown?"

'We've been getting hundreds of votes and the results are very interesting, not to mention, a conversation starter.'

The arts and entertainment sector has been particularly hard hit. Paul at *The People's Movies*, for example, is facing challenges with fewer films to review and PRs not engaging on TV content. However, there are also opportunities for experimenting with new types of content; Sebastian Scotney of *LondonJazz News* told us his team has been creating 'lockdown interviews', which is only possible because his colleagues had more time during the lockdown to develop and implement them.

Lloyd and Yaya have also been forced to change Hand Luggage Only's content as travel is put on hold around the world. To maintain engagement with their audience, the pair are creating content they're 'personally interested in' such as easy recipes and 'more fun-led video updates'.

It's not always the content that's been affected, with personal challenges brought on by the outbreak also affecting the day-to-day output of influencers. John is juggling his usual influencer duties with homeschooling and sharing home workspace with his wife.

For Jo, it's her motivation that's taken a hit, which is something many of those working from home are currently experiencing. She said: 'I'm finding it very hard to feel at all motivated or creative, and am mainly drifting about the house reading Poirot books and eating chocolate raisins. My usual tactic for getting out of this sort of slump is a change of scene – working from a cafe or the coworking space I'm a member of – so with that off the table I'm finding it difficult to break the cycle.'

> 'My usual tactic for getting out of this sort of slump is a change of scene – working from a cafe or the coworking space I'm a member of '
>
> Jo Middleton
> *Slummy Single Mummy*

While the adjustments have proved challenging, influencers are starting to see more opportunities as PR and marketers focus on raising awareness, so they can hit the ground running as the lockdown eases up.

Sebastian's 'superb' advertising manager has landed new commercial relationships in recent weeks, while the wedding influencer is providing more support to existing clients. Jo has noticed things start to improve in May: 'In the last week or so I have noticed things start to pick up a little bit. Hopefully the initial freeze, while brands evaluated their position and the way forward, will start to thaw and things will gradually get back to a new kind of normal. Let's just hope my motivation can keep up!'

And John provides a note of optimism for the whole influencer marketing industry: 'The latter half of 2020 and probably much of 2021 is going to be tough. Anyone who says otherwise is deluded. That said, influencers are in a good position to respond quickly as the lockdown is lifted and various markets open up again. We have lithe, lean operations and can provide marketing support at speed.'

How influencers and brands act now will set out how they perform and are perceived in future, once we reach a post-lockdown world. For Elle, she is doing what she can to support sole traders and independent instructors, which she thinks should be reflected by bigger brands. She said she would '100% be more supportive of brands who are able to, and trying to, support their industries at this time'.

Overview

Influencers are now a well-established channel for consumers who can follow those with the enthusiasm and knowledge to match their interests and mirror their opinions. Blogging has been the foundation of the influencer industry, but as more social media platforms have been developed, there are new ways to create and share content. Blogging is therefore just one element of the wider influencer market. This year the analysis encompasses other influencer platforms, such as Instagram and Twitter, that are being used as primary and secondary influencer channels.

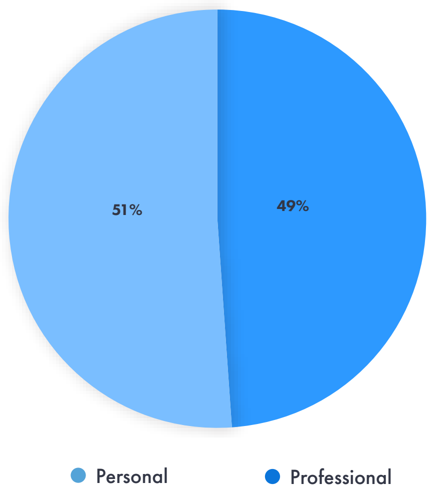
The report builds on the Annual Vuelio Influencer Awards to gain insight to the work of influencers, the topics they cover, their pay and work with PR/marketing professionals and the future of the industry. Last year, there was considerable interest from both influencers and influencer marketing professionals around organic, compensated and sponsored posts so this year's survey gives more detail on the critical issue of compensation.

Data has been gathered annually since 2016 except in 2019, so in the report comparisons do not include 2019. From data collected in 2020, a number of key findings emerge;

- Overall, only 30% of all influencers' content receives some sort of compensation and most frequently undertaken paid for activity is sponsored blog posts and sponsored social media content
- The biggest growth given in terms of why people blog is 'it's my main source of income', up 11% in the last four years, compared to 'it's a hobby' which has declined by 8% in the same period. This suggests a natural progression from a hobby to pursuing it as a career, as their influencer skills and followers grow
- It is interesting that since 2017, respondents have increasingly reported (up 18%) that they believe they should be paid for all the coverage given to brands and continued to believe that sponsorship disclosure is important (89%)
- Most influencers spent between 5-10 hours per week on their channel but over the last four years, those spending 30 hours working on their channel has increased 8%
- Few influencers use just one channel whereas almost three-quarters create and share content on four or more platforms
- Five key topics, 'the supersectors', have remained top of the list of themes for influencers' channels: lifestyle, travel, food, parenting and fashion and beauty
- Fashion and beauty has seen the biggest decline in the number of influencers choosing this as a theme over the last four years (-13%)
- In terms of size of unique visitors, the range of small, medium and large influencer brands has stayed almost static over the last four years with the medium size (1,000 – 10,000) continuing to be the most common size (average 41%)
- Influencers are still predominantly female with a wide age profile but for the first year since this survey began, the largest group is now in the 35-44 age category
- A new mega-channel category has been identified, attracting more than 50,000 unique visitors. It accounts for 10% of all influencer channels and has only seen a gradual growth over the last three years
- Influencers are posting more frequently with the biggest growth over the last four years coming from those who post more than five times a week
- Three-quarters of Influencers are most likely to reject a pitch because of its lack of relevance to their audience, leading to many pitches being unsuccessful
- Influencers expect advertising to grow on influencer channels and the audience to become more sceptical of their motives

2
Types of influencers

Figure 1: *Percentage split of those influencing for professional or personal reasons.*



2.1 Influencers equally likely to give personal and professional reasons for influencing

Over the last four years, growth has consistently come from professional influencing but is now almost equal to those citing personal reasons. In 2016, 38% of respondents reported influencing professionally compared to 49% now, mirroring the growth of the numbers of platforms and the growth of the industry itself. It is likely that many start influencing for personal reasons and then over time gain experience, build relationships and grow their followers so that they can transition to make their influencer channels more professional.

The biggest growth given in terms of why people blog is *it's my main source of income*, up 11% in the last four years, compared to *it's a hobby* which has declined by 8% in the same period. This suggests a natural progression from influencing for a hobby to pursuing it as a career as their influencer skills and followers grow. For most other reasons, changes over the last four years have been marginal.

New reasons have been identified this year for influencing as an additional source of income, supplementing other part-time or full-time work. This response is currently small but will be investigated next year to measure how many choose influencing as a part-time career.

2.2 Influencing as a main source of income continues to grow

Overall, the trend in reasons why people blog remains very consistent with previous years, with just under half (49%) doing so for a range of reasons classed as professional – increasing from 38% in 2016. The role of influencing as a career choice is also evident with just over a third (35%) reporting that influencing is their current or planned future income – an increase of 14% since 2016.

Table 1: *Percentage of Professional Influencer channels 2016-2020*

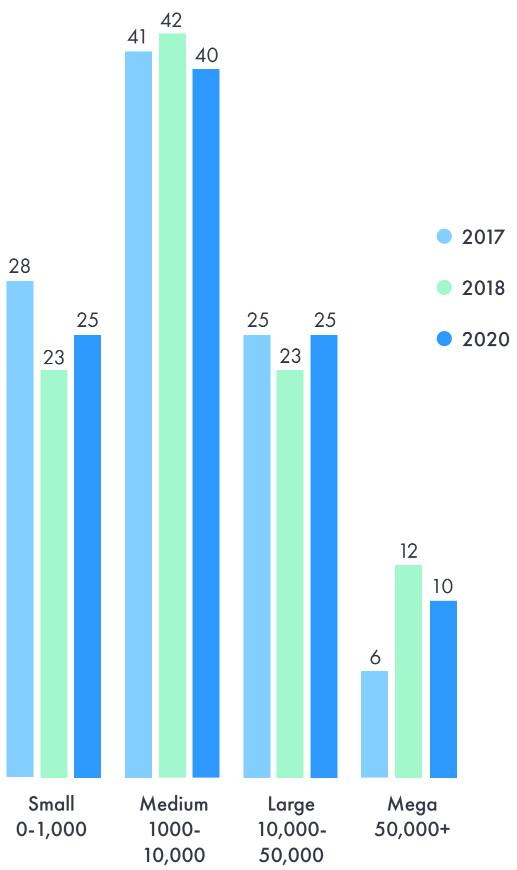
Year	% Professional Influencer channels
2016	34%
2017	42%
2018	51%
2020	49%

Men (23%) and women (26%) equally reported it's a hobby as the main reason they are an influencer, although men also reported the main reason as a main source of income (23% compared to 14% for a woman). Men are almost twice as likely (19%) to report they are attempting to become an established expert in their field compared to women (10%). It was also found that women are twice as likely to indicate that they worked as an influencer to express their thoughts and opinions (17% v 9%).

Figure 2: *Reasons for influence %*

Note: *Data excludes 'to keep in touch with family and friends' due to low response rate*

Figure 3: *No. of unique visitors to blogs %*



2.3 Influencer market remains focused on medium-sized channels

There has been very little change in the size of blogs since 2017 with those attracting between 1,000-10,000 unique visitors on a blog per month (classed as a medium size) taking the biggest share of the market.

This year, the data has been analysed so those brands with unique visitors above 50,000 are now in a new 'mega-channel' category, which has consistently been the smallest group and has in fact declined 2% since last year.

This year, only 3% were not sure how many unique followers they have compared to 8% in 2018, suggesting greater awareness of this measure of influencer performance, which is particularly important for compensation negotiations.

In addition, analysis of size of influencer channel by social media followers, was also undertaken and this suggests that the medium-sized category dominates across all channels, with the smallest category, mega, accounting for just 6% of the market.

Some clear differences were evident in the reasons for influencing and the number of unique visitors, with those posting for personal reasons more likely to have fewer visitors than those reporting that they influence for professional reasons.
sized category dominates across all channels, with the smallest category, mega, accounting for just 6% of the market.

Figure 4: Number of followers on social media platforms %

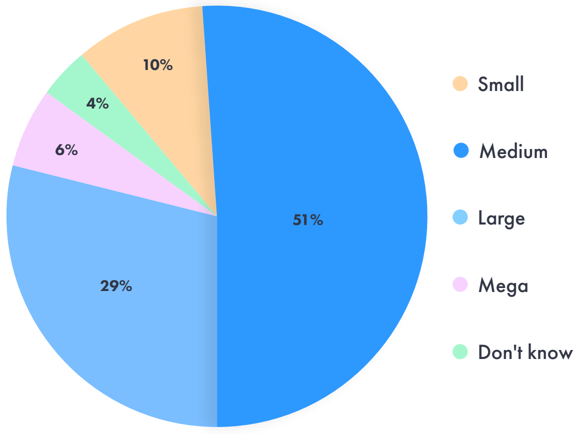
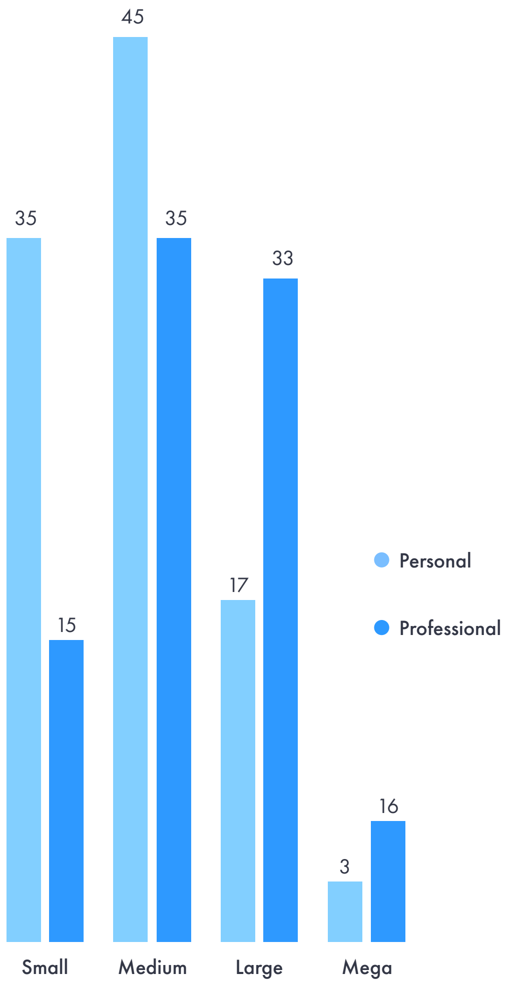


Figure 5: Number of unique visitors depends on reasons for blogging %



2.4 Steady trend in time spent working on influencer channels

25% influencers spent between 5-10 hours per week on their channel and this has remained consistent, ranging from 25-30% over the last four years. However, there is a steady increase in those spending longer on their channels with the largest growth in those spending 30 or more hours a week on their channels, an increase of 8% over the last four years.

Unsurprisingly if you are influencing professionally, more time is allocated to working on your influencer channel. The biggest group (24%) for those who created content for personal reasons spend 1-4 hours per week working on their blogs, up 10% on last year. Those influencing for professional reasons were most likely to spend 30 hours or more per week (29%).

Almost two-thirds (64%) of those working on small channels spend less than 10 hours a week working on content and over half of those working on mega-channels (52%) are spending the longest (over 30 hours), an increase of 27% from last year.

This suggests that in order to maintain higher numbers of unique visitors, more time is spent creating content. Interestingly, for the largest group represented in this study – those classed as a medium size – the weekly time spent is distributed more evenly, although the trend is towards 30 or more hours a week.

Figure 6: *Time spent on influencing %*

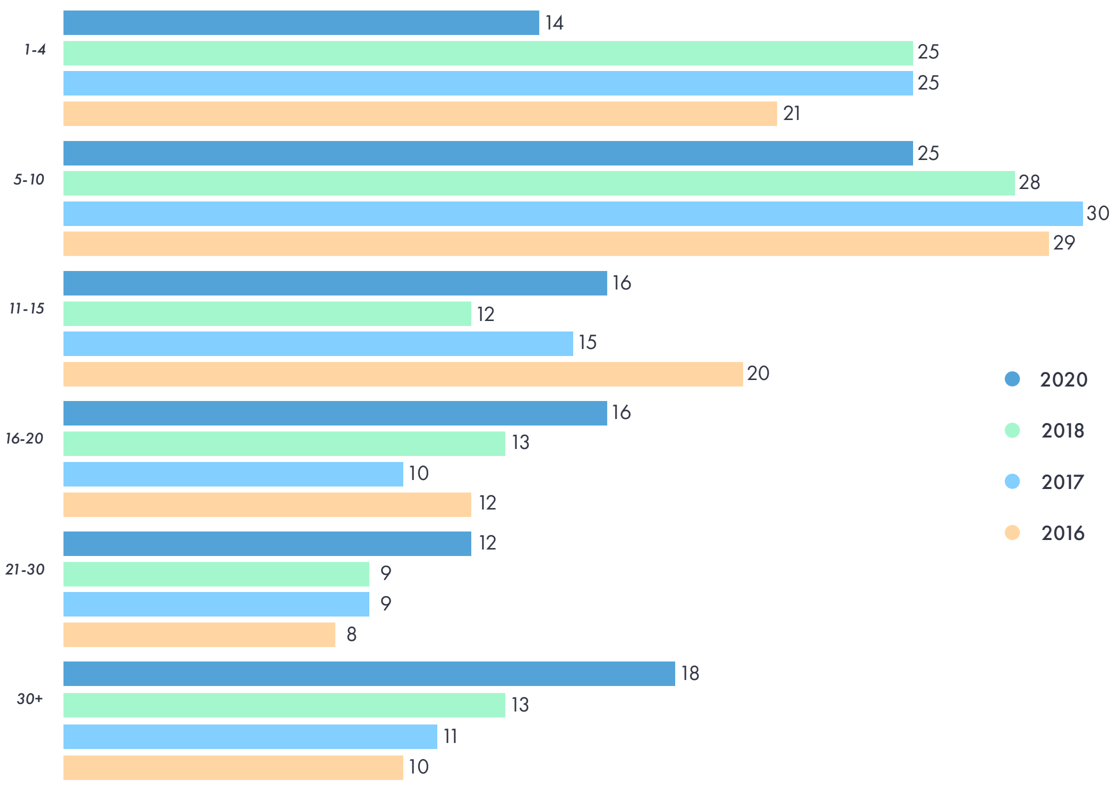
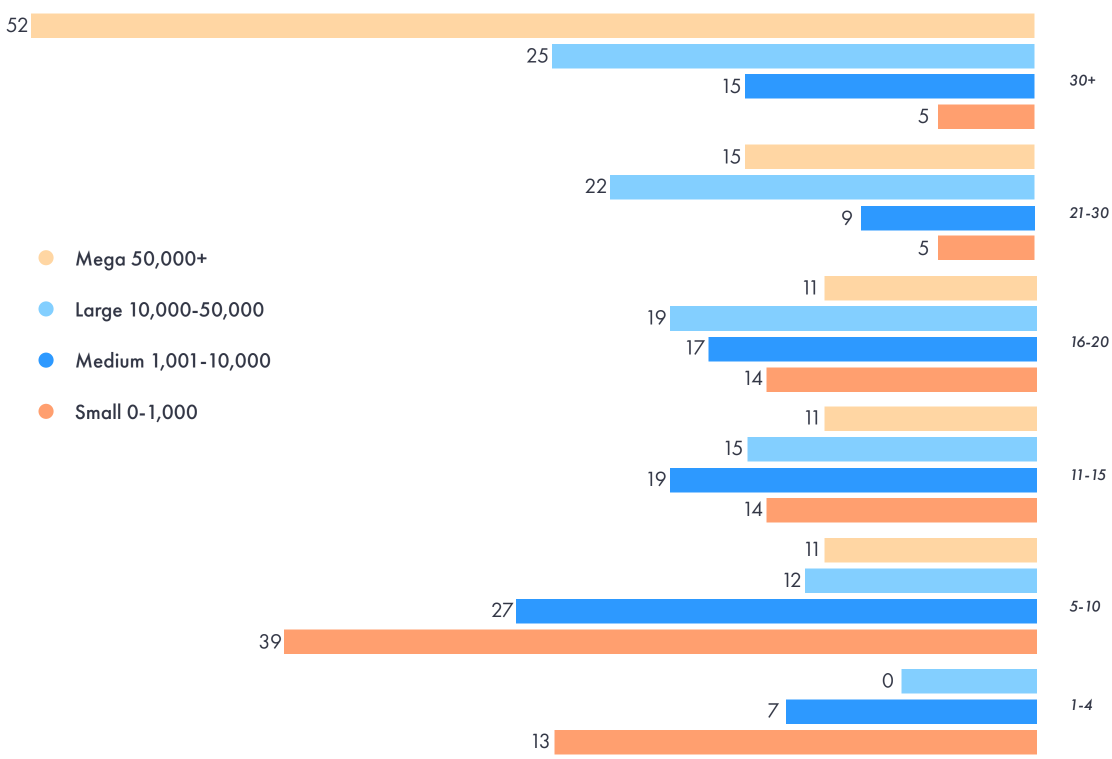


Figure 7: *Number of unique visitors against time spent on main influencer channel %*



3
The five 'supersectors' still dominate but have been reducing over time

3.1 Five subjects account for over half of the influencing activity

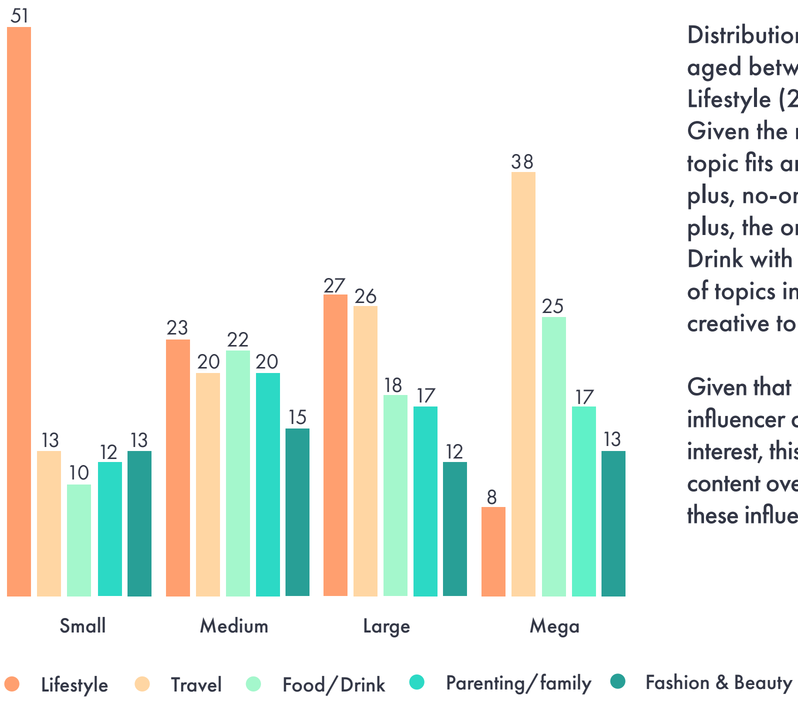
Although respondents could select from 23 different subject categories, the same five, termed the supersectors, still dominate the market but account for 9% fewer influencers compared to 2016. Fashion and beauty has seen the largest decline (-13%) over the last four years, whereas both Travel (+8%) and Food (+5%) have seen an increase. The other three main supersector categories are broadly similar to other years.

Table 2: *Key categories for influencing over time*

Year	2016	2017	2018	2020	Change 2016 - 2020
Fashion & beauty	22%	13%	8%	9%	-13%
Lifestyle	22%	24%	20%	20%	-2%
Parenting	9%	16%	13%	11%	2%
Food	7%	8%	11%	12%	5%
Travel	6%	9%	10%	14%	8%
TOTAL	66%	70%	62%	57%	-9%

Those identifying as lifestyle influencers are mostly found in small categories (51%) and travel accounts for the largest topic area in the mega category (38%). The effects of the global pandemic on travel will only be realised in the 2021 Survey results. It is worth noting that all subjects are almost equally represented in the medium blog category.

Figure 8: *Supersector by size of blog %*



Distribution of age by subject categories shows that those aged between 18-24 focus on Fashion and Beauty (27%) and Lifestyle (27%) but are not working in Parenting/Family topics. Given the nature of parenting/family it is not surprising that this topic fits around certain age brackets, to the point where at 55 plus, no-one is influencing in this topic. And, for those aged 65 plus, the only supersector in which they create content is Food/Drink with the remainder work in small numbers across a range of topics including gardening, political, literature and craft/creative to name a few.

Given that 98% of respondents in this survey own their own influencer channel and create content around topics of personal interest, this might pose them problems on how to develop the content over time. It is not clear what will happen to the longevity of these influencers and how succession planning could be managed.

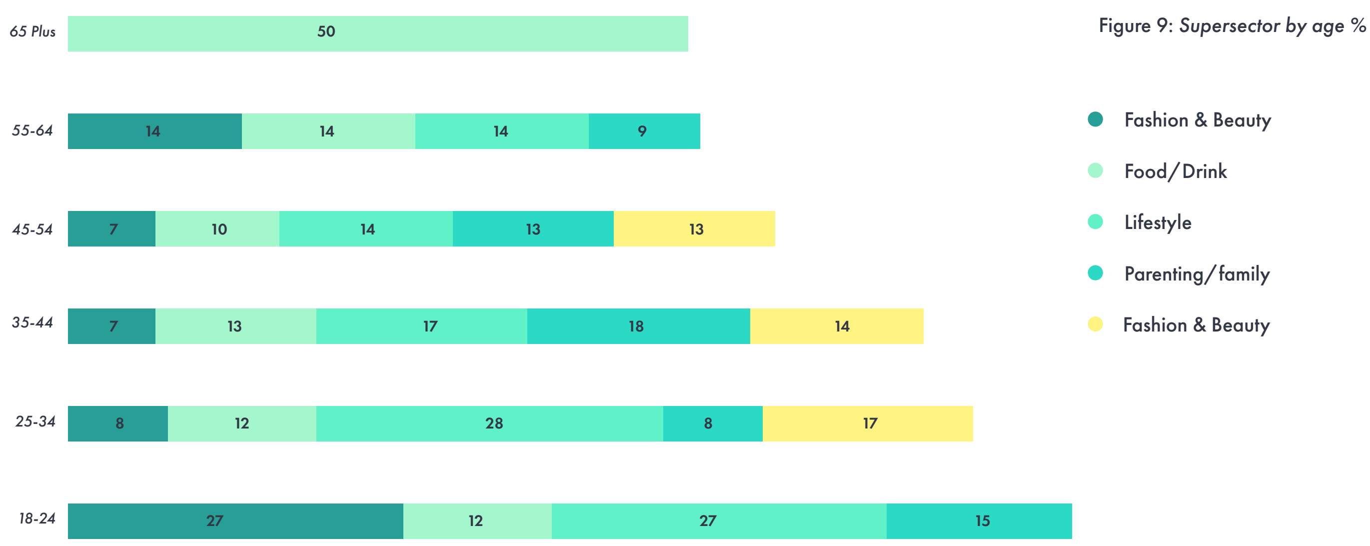


Figure 9: *Supersector by age %*

3.2
Men and women focus on particular sectors, although travel is a topic that both equally pursue

The biggest difference in gender exists in Lifestyle which makes up nearly a quarter (24%) of women's influencer channels compared to just 5% of men, although this has remained broadly similar to findings from 2016.

However, some changes have occurred since 2016, where men's choice of topic has remained static, with the exception of Parenting/Family, which has doubled, from 5% to 10% although small in actual numbers.

Women are working less in Fashion/Beauty (-15%) with an almost identical increase in females covering Travel and Food/Drink (a growth of 9% and 7% respectively).

Men are active across all categories surveyed, with the exception of Craft/creativity, Media/marketing and Business, whereas women were absent in four topic areas: Political, Technology, Gaming and Music, repeating the same patterns as previous years.

Only Travel influencer channels were equally reported on by male and female equally (16% men, 14% women).

Given the personal interest of influencers in their subjects, these findings reflect wider gender related differences in interests of specific topics.

Table 3: *Change in main categories of influencer channels by gender %*

Year	Male 2016	Female 2016	Male 2020	Female 2020
Lifestyle	4%	27%	5%	24%
Parenting/ family	5%	11%	10%	12%
Fashion & beauty	4%	27%	4%	12%
Travel	10%	5%	16%	14%
Food / drink	11%	6%	10%	13%

Figure 10: *Most popular marketing activity %*
(does not add up to 100% as multiple choice available)

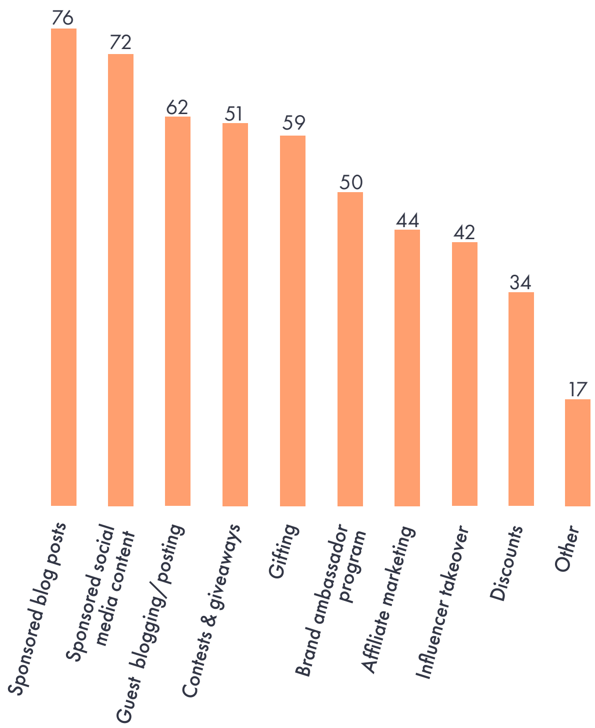
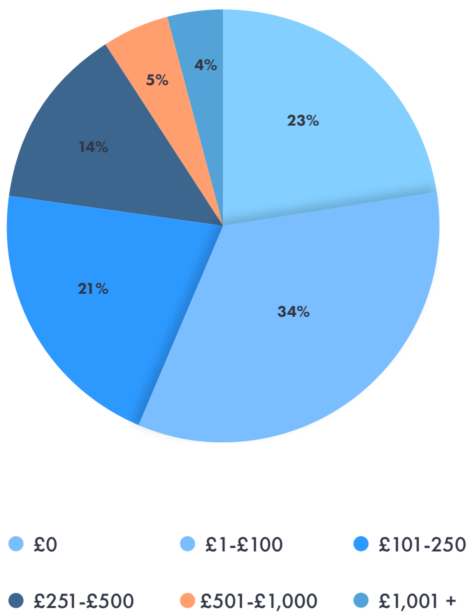


Figure 11: Compensation received by all influencers (including £0)



4
Influencers' compensation

As more respondents cite professional reasons for influencing, the need for compensation for influencers to be able to generate an income has risen. Influencers reported that on average, 30% of all content was in some way compensated. This compensation could take a variety of forms e.g. gifts, trips, direct payments, experiences, etc.

4.1 Collaboration activities of influencers

When asked what types of collaboration influencers participate in, both sponsored blog posts and sponsored social media content were reported as key favourites (76% and 72% respectively) but that overall, influencers are engaging in a whole range of collaboration activities.

4.2 Payment for collaborative activities

It is clear that for all collaborations, 23% claimed they were not paid at all and over a third (34%) claimed that they received between £1 - £100, suggesting that compensation in this sector has not increased.

Given that only 30% of influencers' collaborative work receives payment, it is not surprising that for many activities, there is no compensation. Influencers reported that the activities they were least likely to receive compensation for were discounts (74%) and affiliate marketing (72%)

Sponsored blog posts were most likely to achieve compensation (61%) with 30% charging between £101-£250. The brand ambassador programme was reported as most likely to achieve the highest compensation, with 25% of these activities being paid at £250 or more. Given that ambassador programmes are likely to be a longer-term relationship, this higher amount is awarded for a longer period of time and therefore individual reward measurements are likely to be lower.

While these types of collaborations are most common, influencers are also designing and developing bespoke packages to suit the needs of followers and their topic area. For example, the 'other' category, although small in number, included influencers who are paid for:

- Event attendance or speaking
- Media events
- Attending visit or events to write reviews or content
- Product texting
- Video content creation
- Cross-platform packages
- Influencers working together
- Photo licensing

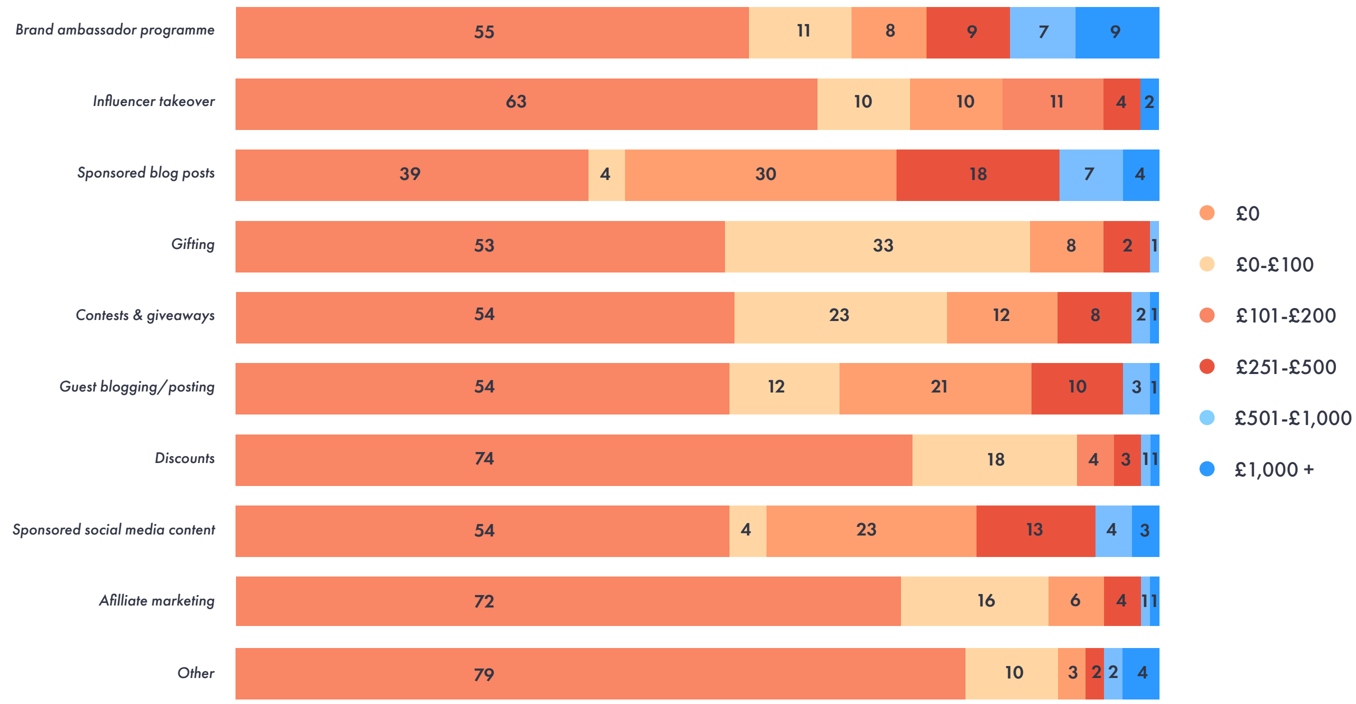
4.3 Influencer compensation by supersector

This graph indicates the pay by supersector, further showing how most compensation is in the £1-£100 category (indicated by the orange line). In terms of no compensation, fashion and beauty is most likely (29%) of all the supersectors not to receive anything.

Of all the categories, food and drink is most likely to receive the highest compensation of £1,000 or more, although this is a rather small percentage (6%).

(percentages do not always add to 100% due to rounding)

Figure 12: *Amount of compensation received by different influencer collaboration activities %*



4.4 Negotiation of compensation

Given the range of opportunities and activities for collaboration, it is not surprising that two-thirds of the respondents claimed that they negotiated their compensation with PR and marketing professionals.

In terms of what measures are used to negotiate compensation, the quantitative measures of number of followers (65%) and monthly page views (62%) were deemed key.

4.5 Percentage of content compensated is consistent except smaller channels are likely to receive nothing

The following table shows both how much content is likely to be compensated for, by the size of the influencer channel (in black), and also what percentage achieved compensation (in red). This has been measured across each of the different sizes of influencer channel. While smaller influencer channels are most likely to receive no compensation (51%), it is clear that for all sized influencer channels, they are most likely (41%-50%) to be compensated for 0-25% of their work.

4.6 Amount of content compensated is not affected by reasons for influencing

Compared to last year's survey, the difference between personal and professional influencer channels and the amount of content that is compensated has decreased, suggesting that from a PR/marketing perspective, there is no discernible difference in why people blog in terms of the influence they have with their followers. For example, in 2018, for influencers who received compensation for 50-75% of their content, 81% cited professional reasons and 19% personal reasons. This year that difference has reduced to 55% for professional reasons and 45% for personal reasons.

Figure 13: *Measures that are considered when negotiating compensation %*

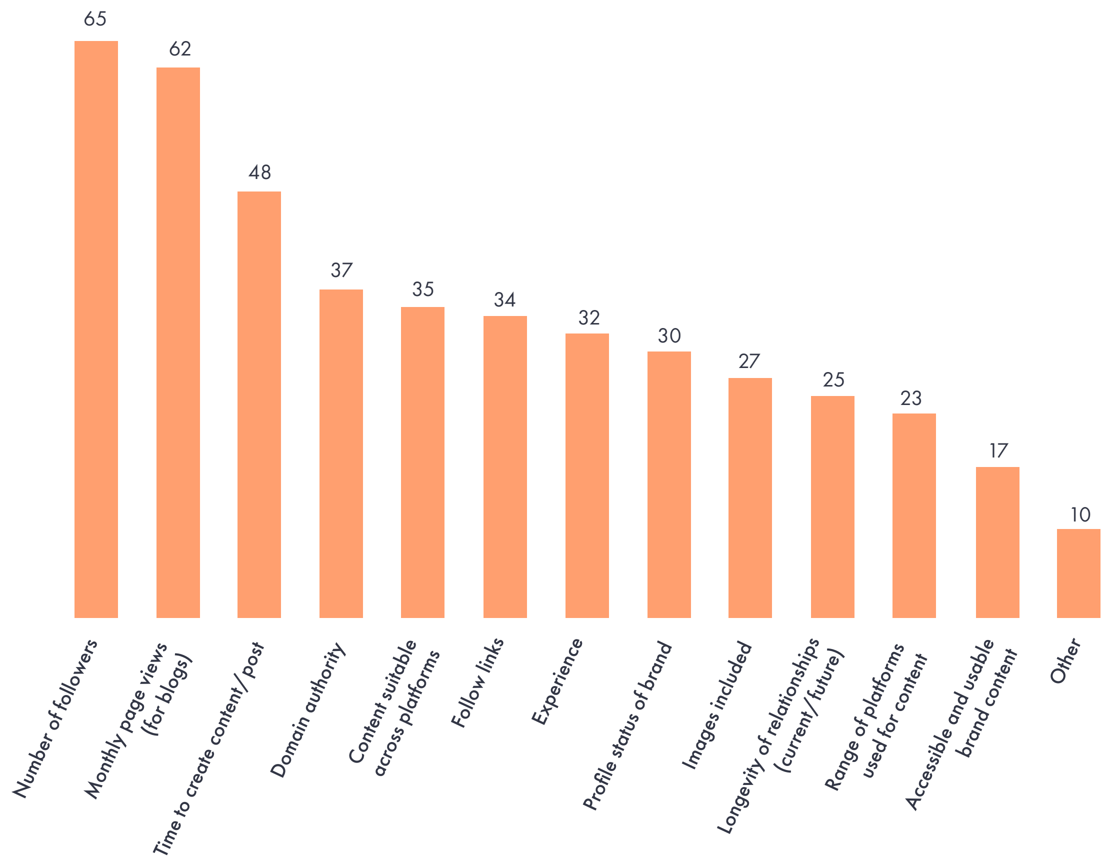


Figure 14: *Influencers' compensation by supersector %*

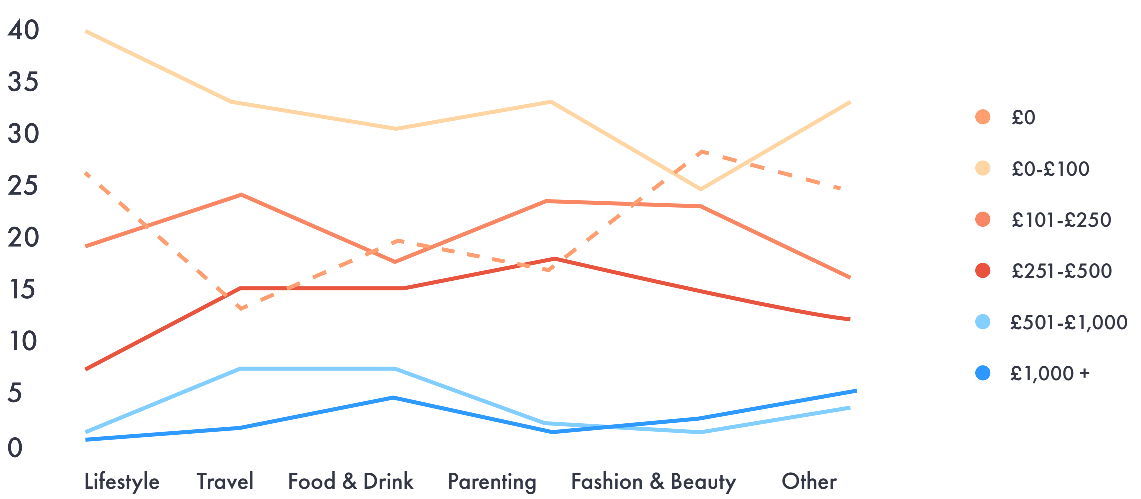


Table 4: *Compensation by size of blog %*

	Small		Medium		Large		Super		Total	
No compensation		51		29		14		6		100
	30		11		8		9		14	
0 - 25%		23		42		25		12		100
	41		46		43		50		44	
25% - 50%		16		46		28		10		100
	15		28		27		24		24	
50% - 75%		23		33		30		14		100
	9		8		12		13		10	
75% - 100%		18		44		32		6		100
	5		8		10		4		8	
Total	100%		100%		100%		100%		100%	

Figure 15: *Number of PR pitches per week in 2020 compared to 2016*

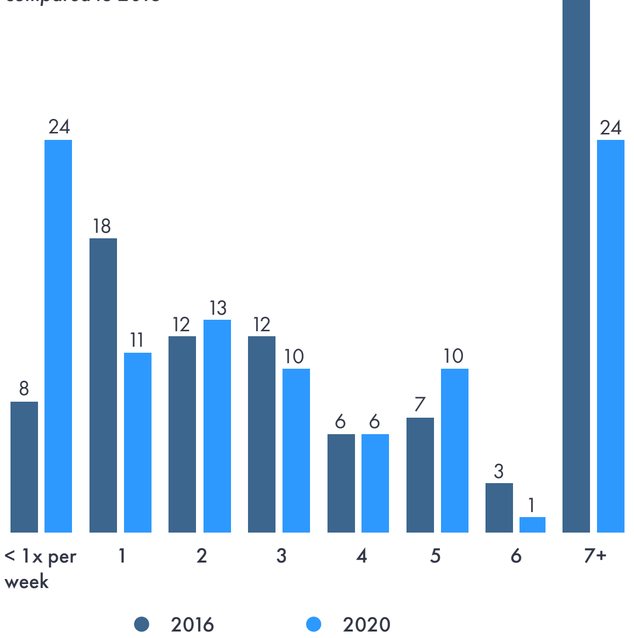


Figure 16: *Amount of content that receives compensation % for a personal or professional blog*

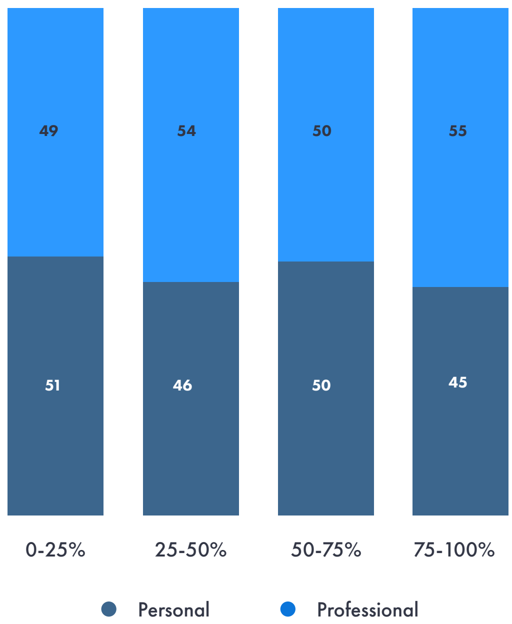


Figure 17: *Number of pitches made against whether this resulted in content %*

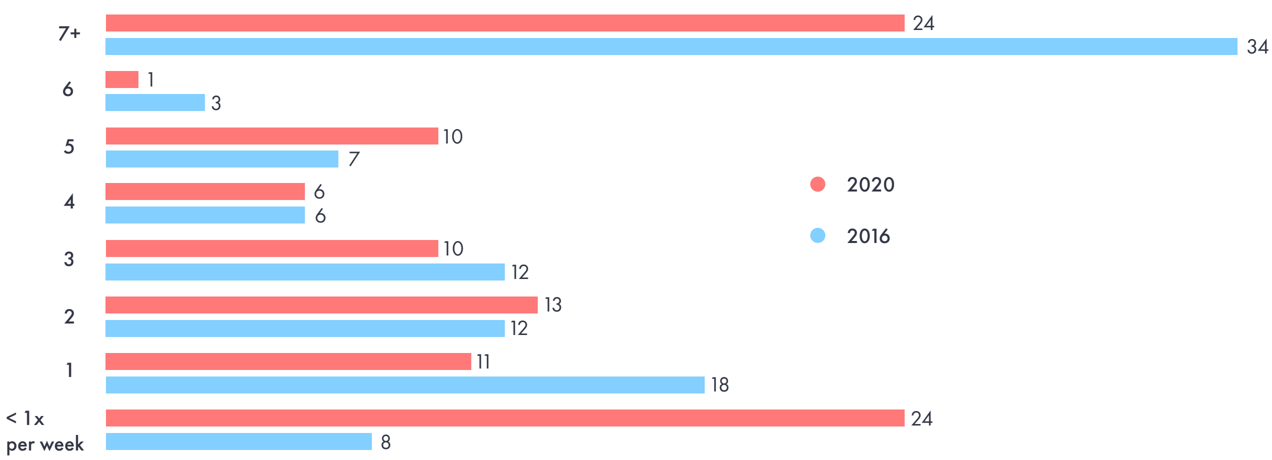


Figure 18: *Frequency of PR/marketing contact by size of blog %*

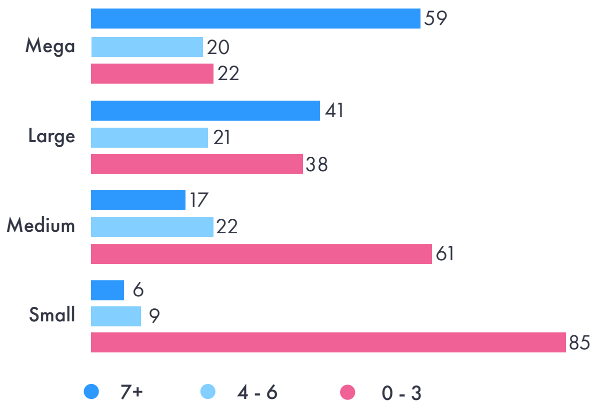


Figure 19: *Factor considered when accepting a brand sponsorship %*

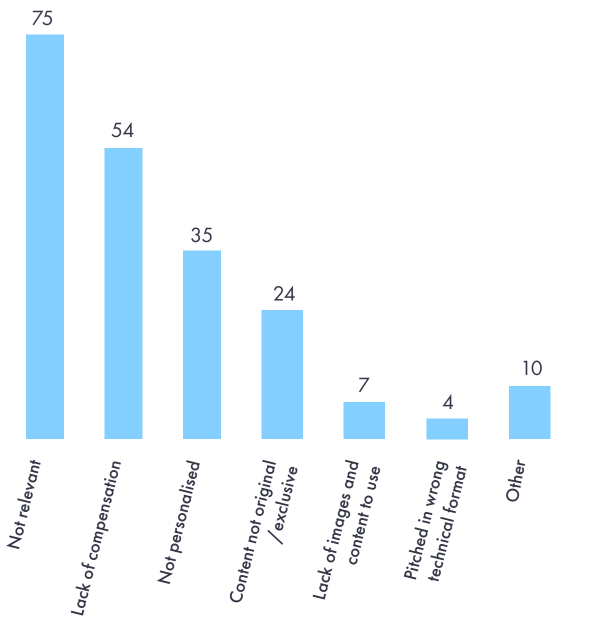
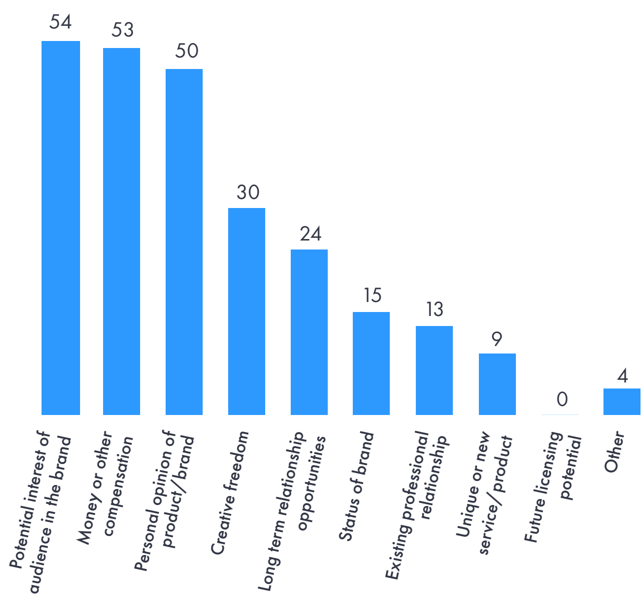


Figure 20: *Considerations when negotiating compensation %*



5 Relationships with PR and marketing professionals

5.1 Influencers receiving fewer pitches overall but mega-size receiving more

Overall, it appears that pitches at most levels of frequency is declining, seen in the growth (16%) in influencers receiving a pitch less often than once a week since 2016. At the opposite end of the scale, there is a decline of 10% in seven or more pitches received weekly since 2016 (24% down from 34%).

This difference is partly explained by the size of the influencer channel with 85% of small channels most likely to be contacted less than once a week (a significant increase from 41% in 2018), compared to only 6% who are contacted seven or more times. In comparison, for mega-sized channels, only 6% are contacted less than once a week and 59% are contacted seven times or more – up 8% on last year. This suggests a more targeted approach from PRs who are focusing their efforts on the influencers with bigger audiences.

5.2 PR pitching is ineffective as it is not leading to publication

A key question for PR practitioners is the effectiveness of their pitch in terms of influencers creating content, and despite these findings being published consistently over the last four years, the pattern of activity remains the same. The patterns are very similar regardless of whether influencers operate for personal or professional reasons.

5.3 Most pitches fail due to lack of relevancy and compensation

To be more effective in their pitches, PR and marketing professional should undertake more research to ensure their content is directly relevant to the influencer channel.

5.4 Accepting brand sponsorship is based on audience interest, compensation and influencer's personal opinion

Influencers reported that the interest of the followers in the brand was the main consideration in accepting sponsorship (54%), followed by money or other compensation (53%) and personal opinion of the product/brand (50%).

This suggests that influencers have to juggle a number of potentially conflicting demands when working with brands. Influencers not considering long term relationship opportunities (24%) and future licensing potential (0%) suggests a rather short-term approach to managing their relationships and channels. However, given that the influencer market is relatively new (compared to traditional journalism) the focus on growing the channel is likely to be more short-term than on the longevity of the influencer brand.

6
Influencers' work

6.1 More frequent content creation has increased over four-year period

Over the last four years, influencers have reported that they are creating content more often (five times a week or more) with declines for those posting less often.

In terms of posting content, there are differences in posting frequency, with higher frequency more associated with professional reasons for influencing. For example, those posting one to four times a week are more likely to be creating content for personal reasons (58%). Whereas, those posting more frequently are more likely to be doing so for professional reasons (64%) compared to personal reasons (36%). Of those posting eight or more times per week, 63% did so professionally against 27% who posted for personal reasons.

Regardless of whether influencers create content for professional or personal reasons, the three main platforms (blogs, Facebook and Instagram) are used to a similar extent. The exceptions are Pinterest and YouTube, which are more likely to be used by those who are influencing for professional reasons.

For example, 37% of those using Pinterest stated personal reasons, compared to 63% for those with professional reasons; similarly 29% of those using YouTube stated personal reasons compared to 71% for those influencing professionally.

Table 5: *Considerations when negotiating compensation %*

Number of posts per week	% of respondents				
	2016	2017	2018	2020	% change since 2016
1	24	38	44	29	+4
2	27	25	21	16	-11
3	23	18	15	15	-12
4	8	6	6	10	2
5 or more	18	13	14	30	12

Figure 21: *Main and additional platforms used %*

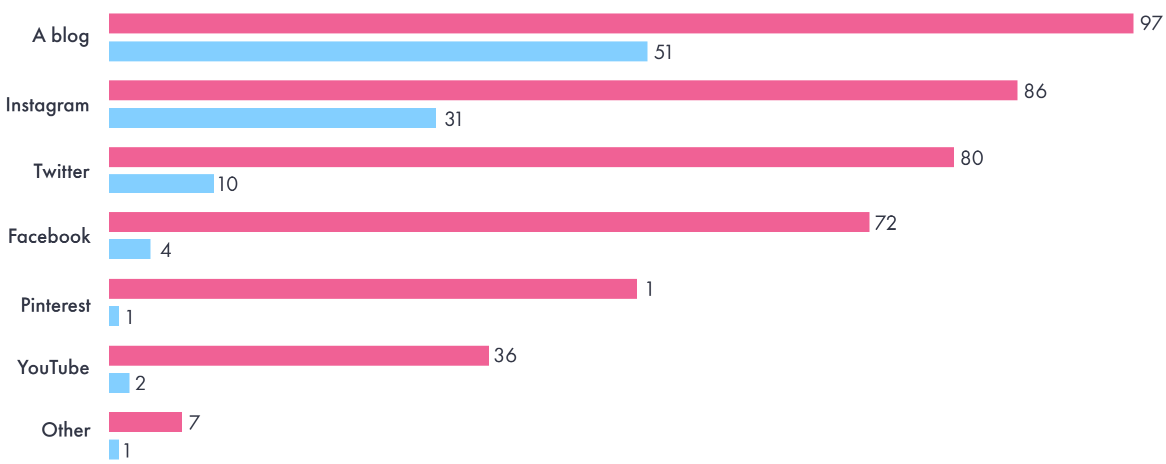
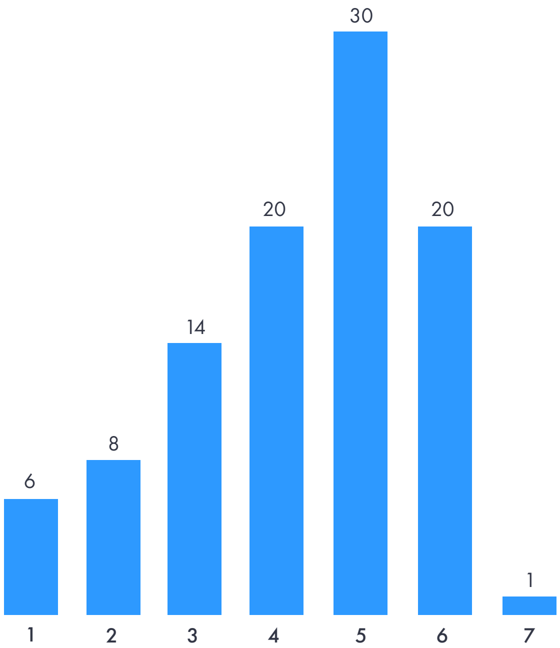


Figure 22: *Number of platforms used %*



6.2 Four main platforms preferred but influencers creating content on multiple channels

Blogs remain the main platform for building the influencer channel, although the four main platforms: blogs, Instagram, Twitter and Facebook are all used in combination, regardless of which platform is used as a main preference.

The other category includes 1% LinkedIn but interestingly, 2.4% indicated that they were creating content for TikTok and this is likely to be a growth platform for some categories of influencer, particularly because of its growth in the second quarter of 2020 during the global lockdown.

Only 6% of influencers use just one channel, whereas 71% use four or more and 85% use three or more. This suggests that influencers are no longer on a single platform but developing content on multiple platforms and this will increase the time influencers need to spend on their channels in future.

Men have indicated that they are likely to use a blog and Twitter more than women, but Instagram is a clear favourite for women driven by their dominance in Lifestyle which lends itself to visual content.

Table 6: *Main platform used by gender %* *Note: not including "prefer not to say"*

	A blog	Instagram	Twitter	Facebook	Youtube	Pinterest	Other
Female	50%	37%	7%	5%	1%	1%	0&
Male	60%	13%	21%	3%	3%	0%	1%

7

Views on the influencer industry and its future

7.1 Influencers consistently agree that sponsorship disclosure is critical

Views on payment for coverage and disclosure have remained consistent from last year. There is a small increase (8%) in those expecting to be paid for their collaboration this year with 68% agreeing or strongly agreeing they should be compensated for coverage. Given that only 30% on average receive compensation, this is likely to generate conflict between PR and marketing professionals and agents and influencers.

It is interesting that since 2017, respondents have increasingly reported (up 18%) that they believe they should be paid for all the coverage given to brands and they continue to believe that sponsorship disclosure is important (89%). Those who influence professionally were more likely to agree or strongly agree that they should be paid for brand coverage (65%) against those who influence for personal reasons (53%), although this has risen by almost 10% since last year. Those who stated that influencing is their main source of income (36%) or plan for it to be a future income (32%) are more likely to strongly agree they should be paid for all coverage, compared to those who create content for a hobby (15%) or to express their thoughts and opinions (25%).

Figure 23: *Views on commercialisation of influencer channels %*

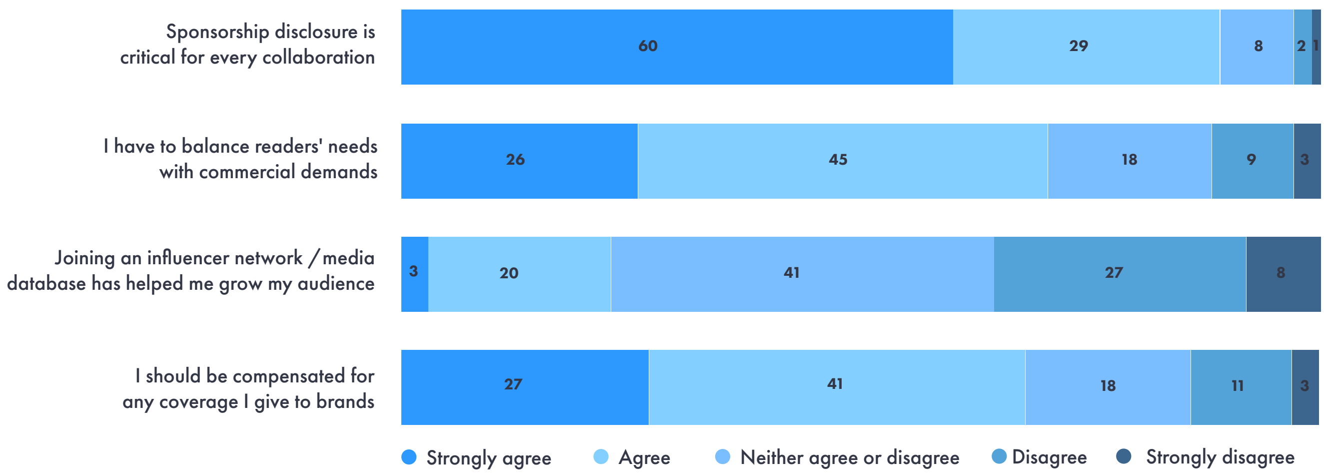


Table 7: *Views on commercialisation of influencer channels %*

	Agree/strongly agree 2017	Agree/strongly agree 2018	Agree/strongly agree 2020
I should be paid for all coverage I give to brands	50%	58%	68%
Sponsorship disclosure is important for every collaboration	87%	88%	89%

Table 8: *Size of blog based on unique visitors by agreement that coverage should be compensated %*

I should be compensated for any coverage I give to brands

Size of blog	Strongly agree / agree
Small	64
Medium	67
Large	71
Mega	69

Table 9: *Size of influencer channel based on social media followers by agreement that coverage should be compensated %*

I should be compensated for any coverage I give to brands

Size of channel	Strongly agree/agree
Small	76
Medium	62
Large	77
Mega	81

Table 10: *Main influencer channel used by agreement that coverage should be compensated %*

I should be compensated for any coverage I give to brands

Channel	Strongly agree / agree
A blog	76%
Instagram	62
Twitter	77

7.2 Sponsorship disclosure seen as critical for all types of influencer

The statement that sponsorship disclosure is critical warrants further examination, as there appears to be a strong agreement across the whole sector regardless of the size of influencer channel, number of unique visitors, social media followers or main platform used for content creation.

7.3 Perception of Influencers by PR and marketing professionals

There has been very little difference over time in how influencers think they are perceived by PRs and marketing professionals with a majority still agreeing that they think journalists are more important than influencers. Compared to the last three years, there has been a steady decline from 54% to 35% who agree/strongly agree that bloggers/influencers are more trusted than traditional journalists.

However, given 70% of content is not sponsored, influencers can claim brand independence, given that most of their content is organic.

These views are consistent regardless of the size and type of influencer channel. Further investigation is needed to understand why this view is held and what can be done to ensure that it doesn't continue to decline.

7.4 Influencers expect more advertising on channels and greater auditing of accounts

Inflencers are indicating that there are some areas of concern about aspects of the industry and their work. Since last year there has been a 10% increase in agreement that *the audience will become more sceptical of influencers* (42% in 2018), and a corresponding decline of 10% that *influencers will be viewed as independent* (34% in 2018). With a growth in 11% of those agreeing that more adverts will be published on influencer channels, there is an increasing understanding that the market is becoming more commercialised and so the audience and sponsors need to be assured of their independence.

To address this, 58% think auditing will increase to prevent fraud, perhaps reassuring brand owners and the audience of accurate visitors and follower numbers.

Influencers reported that a key benefit is how they can appeal to specific audiences and almost three quarters (73%) agree/strongly agree that influencers can cover topics that the mainstream media neglects.

Figure 24: Influencers' opinions on working with PRs

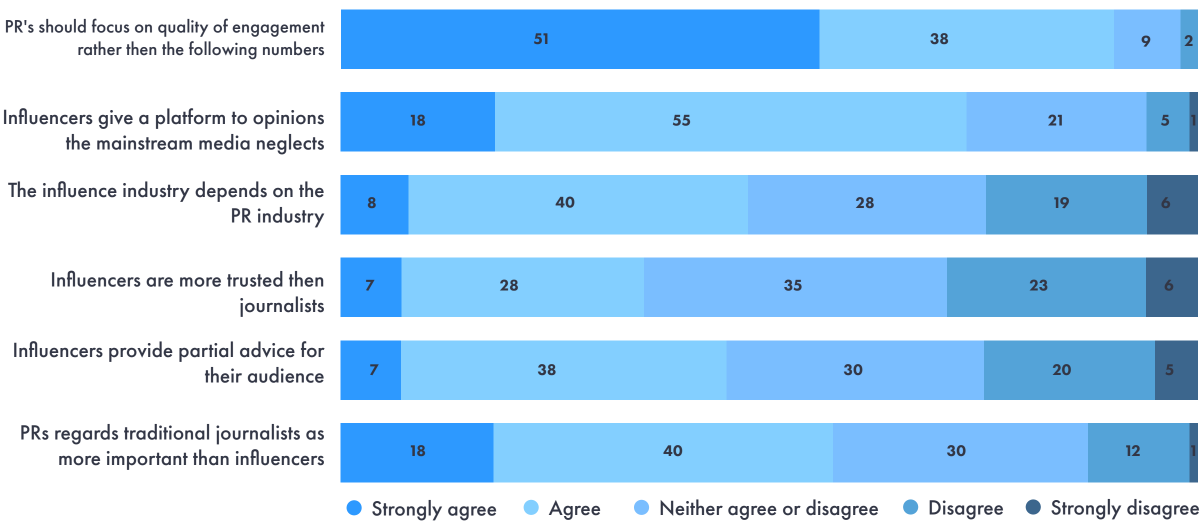
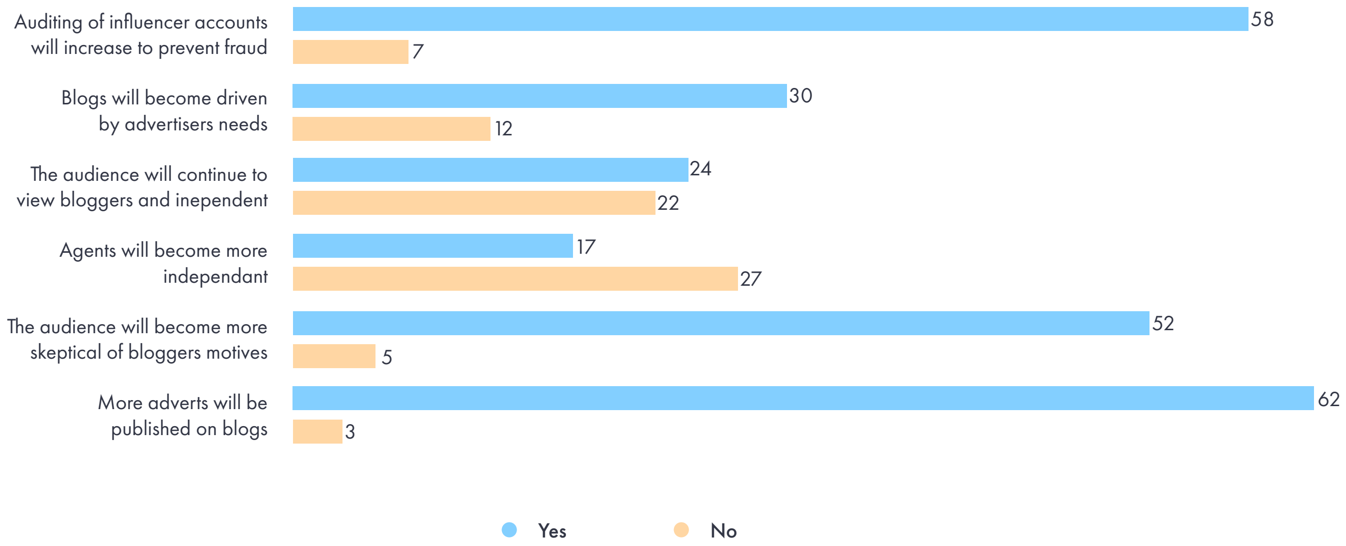


Table 11: *Views on blogging and PR %*

		Agree somewhat	Agree completely	Total
PRs regard traditional journalists as more important than bloggers/Influencers	2016	40	22	62
	2018	33	20	59
	2020	40	18	58
Bloggers/Influencers are more trusted than traditional journalists	2017	37	17	54
	2018	30	10	40
	2020	28	7	35

Figure 25: *Influences views on the future of industry %*



7
Demographics

7.1 Influencing still dominated by women but spread across all ages

Figure 26: *Gender of influencers %*

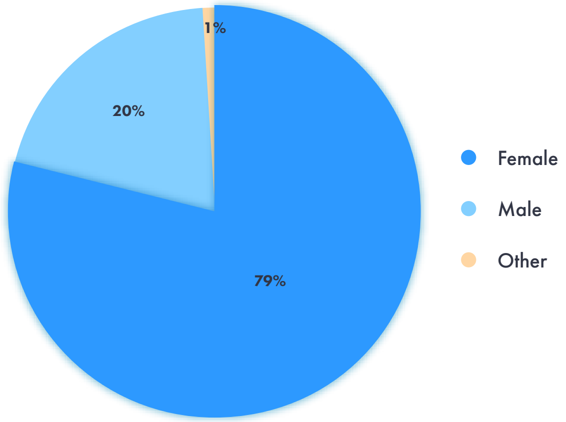


Figure 27: *Ethnicity of influencers %*

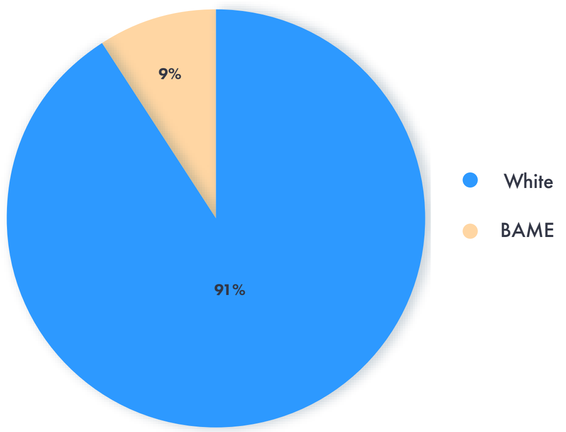
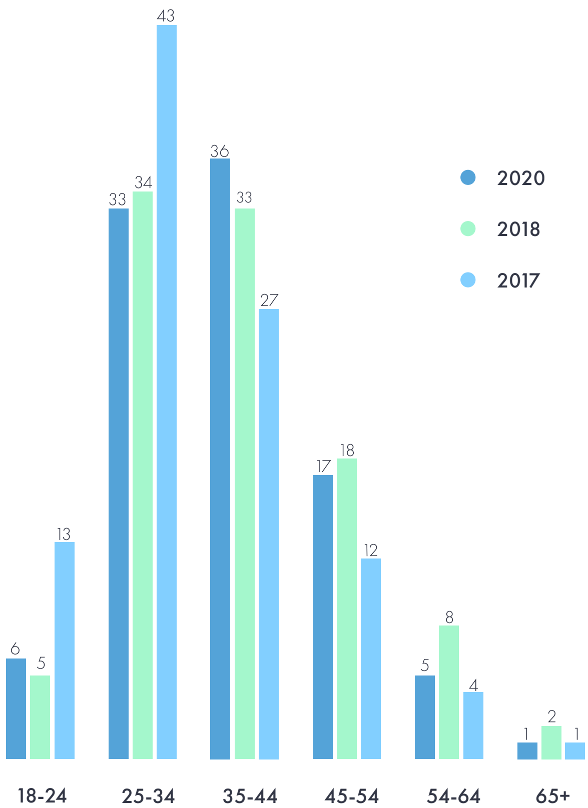


Figure 28: *Age of influencers %*



Respondents to this survey were 79% female, 20% male with 1% indicating other, which remains a consistent pattern since 2016, where 77% of respondents were female, suggesting that influencing remains a female-dominated activity.

Respondents reported that 91% were white British, compared to 93% in 2018. Given the UK is 87% white, there is work still to be done to encourage greater diversity in this sector.

Influencing remains something that appeals across the age groups with those aged 35-44 representing the largest group (36%) for the first year ever since reporting this data. Those aged 35-44 were most likely to say that influencing was a main source of income (28%) compared to those aged 25-34 who cited it's a hobby as their main reason for influencing. For those aged 45-54, influencing as a main source of income and it's a hobby were reported as being of equal importance.

Summary

Overall, the responses this year show a relatively consistent pattern with the past four surveys, with the supersectors continuing to attract the most attention from the audience and sponsors, but it is clear there are a whole a range of topics appealing to smaller and niche audiences.

While the dominant sectors attract larger volumes of unique visitors and social media followers, most of the influencer market attracts a medium size audience, and this has not changed over the last four years.

The sector is equally split between those who give professional and personal reasons for influencing and in terms of the PR and marketing view, their content remains just as important for collaboration.

Influencers reported that compensation is a key factor in their work with sponsored blog posts and social media content the most popular but there are a range of collaboration activities, all of which can be tailored to the needs of the influencer, audience and sponsor.

There is agreement from the respondents that compensation is of growing importance across the sector to finance their work. Advertising will play a more important role and, to reassure visitors and followers, sponsorship disclosure and auditing are likely to play a larger role in the future.

The UK Influencer Survey is designed to help everyone working in influencer marketing, from the bloggers, vloggers and instagrammers creating content to the PRs, brands and marketers that collaborate with them. Practitioners can use this year's results, alongside year-on-year trends, as the UK industry benchmark and develop their influencer marketing strategies to stay ahead.

The UK Influencer Survey will return in 2021.

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About the survey

This survey was conducted in February – March 2020 to explore how influencers work, their activities and views about their relationship with PR professionals and the future commercialisation of their work. To reach this group of influencers an online survey was sent to an initial list of 5,805 influencers from the Vuelio Database. This resulted in 482 usable responses which represents a response rate of 8.3%. As the database is represented by those owning and managing their own channel (98% of respondents), those who influence on behalf of organisations are under-represented and may have different views and behaviours than those represented here.

About Vuelio

In the age of information overload when it's harder than ever to cut through the noise, Vuelio helps organisations make their story matter providing monitoring, insight, engagement and evaluation tools for politics, editorial and social media in one place. We help you determine who and what is most influential to your audience and brand. Then, with a wealth of reporting and relationship management options, you get real-time feedback to create even more effective communications.

From expert bloggers and YouTube stars to journalists and MPs, we provide influencers with timely and relevant content, while giving you the insight and connections you need for your communications to have impact.

Our technology is used by more 3,000 organisations across the world, from large enterprises and communications agencies to public sector bodies and not-for-profits. We're part of the Access Intelligence Group that includes ResponseSource, a network that connects media and influencers to the resources they need fast, and Pulsar, an audience insights and social listening platform.

vuelio.com

About Canterbury Christ Church University

The Business School at Canterbury Christ Church University offers a range of professional and vocational Programmes, supported by work experience, experiential learning and a dynamic and interactive learning environment. The university has developed rapidly since its inception in 1962 and now has around 15,000 students based at locations across Kent in Canterbury, Medway and Tunbridge Wells. As well as being Kent's largest centre of higher education for the public services – notably teacher training, health and social care and the emergency services – the university also offers academic and professional programmes, including doctorates and research degrees in the arts, humanities, business, engineering and social and applied sciences. The university is working with industry and businesses in the south east to develop its STEM courses and is working in partnership with the University of Kent on the development of the medical school.

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