

Like, Share, Subscribe: The Market of Influencing



KANTAR x **INCA**



Introduction

An understanding of influencers' role in driving consumer behaviour

The last few years has seen a sharp growth in the number of Indian content creators and influencers. This phenomenon has been catalysed by the availability of a myriad of social media and video platforms that have created an effective and growing medium to connect brands with consumers. There are numerous anecdotal case studies on the workings and effectiveness of the influencer marketing ecosystem. However, a successful campaign should be one that delivers the right brand message within an appropriate context.

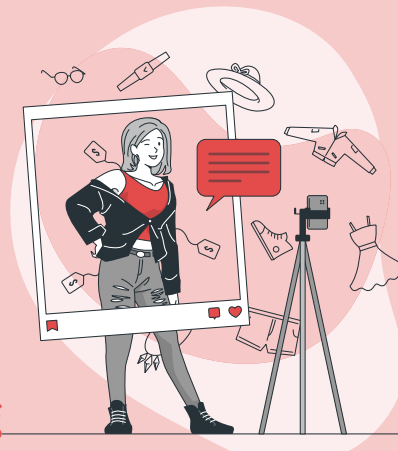
Kantar and INCA are delighted to bring to you our first consumer insights report to help users understand the influencer ecosystem in terms of the size of active followership and the role of influencers across the brand purchase funnel and variability across platforms.



In addition to the results from our survey, we also packed the report with all the influencer marketing benchmarks, metrics and data that matter most to you.


Reach of influencers	Who	Where	How many	What	Why
How many consumers follow influencers	Differences in profile of the consumers – influencer followers vs non-followers	Social media platforms where consumers follow influencers	No. of influencers followed	The categories/genres (DIY, Travel, fashion etc.) consumers follow influencers for	Their motivation for following influencers

You can also look forward to some useful insights that can help fuel your next influencer marketing campaign.



Profiling

- How does influencer following vary across different cohorts
Gender, Age Group, NCCS, Town Class, Education
- Map category incidence and usage within the cohort



Category and Brand Understanding

- Understand the category behaviour and how it is impacted by the influencer following
- Evaluate the brand consumption/platform usage and how it is impacted by the influencer following



Targeting

- Identifying the right cohort that can be targeted by brands via influencer route
- Analysing the psychographics attributes, in addition to the demographic and geographical variables



Communication and Strategy

- Communication cues
- Platforms/communication channels preferred by consumers following influencers
- Identifying the motivation to follow influencers along with category usage so as to create attractive and meaningful content

Methodology

This report rides on Kantar's syndicated study 'The New Indian Consumer Survey (NICS)'. NICS is a face-to-face survey which provides a 360-degree understanding of the consumer covering the category and brand dispositions, cross-media choices and rich profile of consumers in terms of their psychographics.

The study is representative of the urban population covering all the town classes (40L+, 10-40L, 1-10L, <1L). It covers adults and teenagers spanning the 15-55 years age-band in NCCS A, B and C.

The report can be customised for your category and your brands of interest among the relevant consumer cohorts, as the influencer data has been collected on the NICS sample as a rider.



Coverage

All Indian urban representative study covering

- 15 key states
- Towns with 40L+, 10-40L, 1-10L and <1L population
- 20,000+ respondents

Target Group

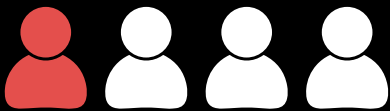
♀♂ Males & females

Individuals aged between 15 to 55

NCCS ABC

Emerging insights from the survey

From our survey, we found that **influencers reach over 1 out of 4 people of the Indian consumer universe** which comes up to a whopping 54.9 million people. Among our target audience, influencers gain more traction among NCCS A consumers aged between 15 to 34, living in the 40L+, 10-40L & 1-10L towns and more so among men (61%) than women (39%).



54.9 Million people



Why do consumers follow influencers?




Consumer follow influencers:

- 📍 To seek information/discover products
This is evident among the 20-34 years old.
- 📍 To help in making purchase decisions
This is especially prominent among the 45-55 years old as they resonate with the Health & Wellness genre which in turn drives their purchase decision.







Genres of influencers followed:

- 📍 Males (Sports, Fitness, Travel and Tech)
- 📍 Females (Food, Lifestyle, Fashion, Beauty and Diet)
- 📍 10-40L and 1-10L (Lifestyle, Fashion, Travel and Gaming)

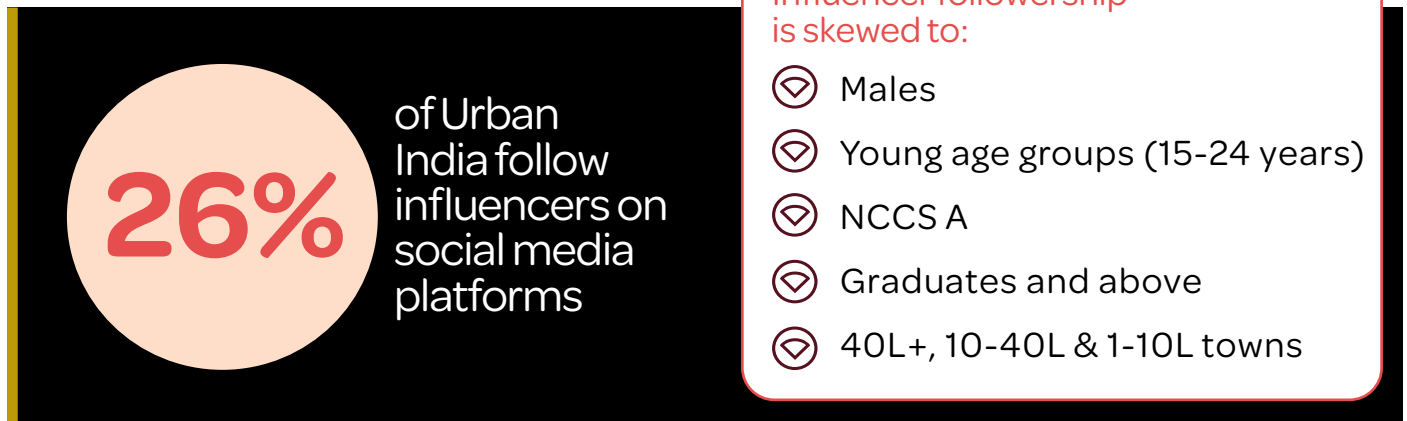
Here's a snapshot of our consumers – **Where are our consumers and what do they look out for across various social media platforms?**

Demographics and Geography		
 <p>♀ Male NCCS A 25-55 yrs. 40L+, < 1L North, East</p>	 <p>♂ Female NCCS BC 45-55 yrs. 40L+ East</p>	 <p>♀ ♂ Universal NCCS A 15-24 yrs. 10-40L, < 1L West</p>
Influencers plays a strong role in		
Purchase decisions	Discovery and encouraging trials	Knowledge, reviews and inspiration
Genres followed		
Lifestyle, Fashion	Food, Health & Wellness	Lifestyle, Fashion
Implications		
Household cleaning products are more likely to work with Facebook influencers. Likely to impact purchase decision strongly among the 45-55 years old	Under indexed on usage of categories owing to the profile. YouTube would play a key role in building awareness and trials	Beauty, personal care products, impulse food products and electronic products are more likely to work with Instagram influencers

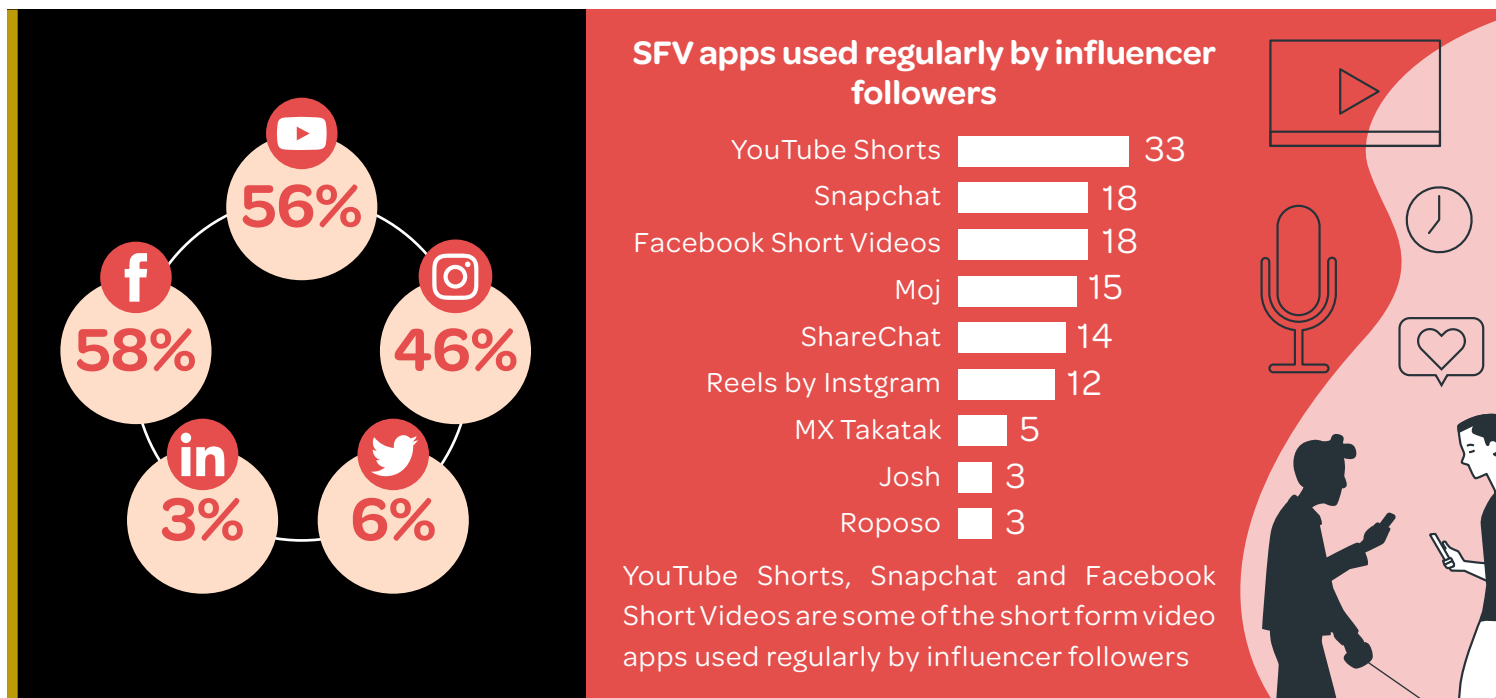
♀ ♂
Universal

 <p>NCCS C 20-34 yrs. 1-10L North</p>	 <p>NCCS B 15-24 yrs. 40L+ South</p>	 <p>NCCS BC 45-55 yrs. 1-10L South</p>	 <p>NCCS B 15-19 yrs. 1-10L North, East</p>
 <p>NCCS C 25-34 yrs. 40L+ North, West</p>	 <p>NCCS C 15-55 yrs. 1-10L, <1L South</p>	<p>Other than to gain knowledge and seek reviews, SFV users demonstrate similar attitudes/motivations towards following influencers. Users of Josh are distinctly overindexed on being influenced towards driving purchase decisions.</p> <p>MX Takatak and Instagram users exhibit similar behaviour to a certain extent. Influencers on SVF platforms were able to help brands extend their reach and drive considerations among the less affluent consumers in small towns.</p>	

Influencer followers in Urban India

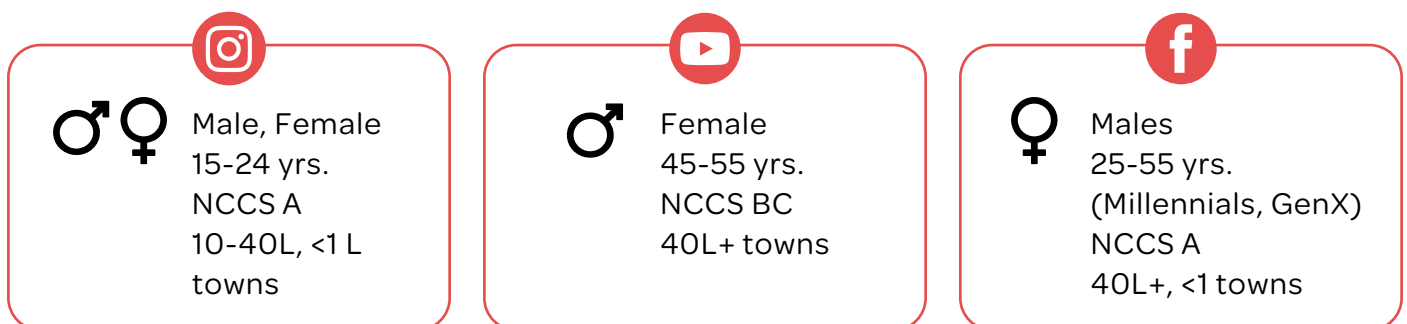


Social media platforms where influencers are followed






Facebook, YouTube and Instagram are the popular platforms preferred by consumers to connect with influencers.

In general, influencer followership is driven by the younger age cohort of 15-24 years, male, NCCS A, 1L+ towns.

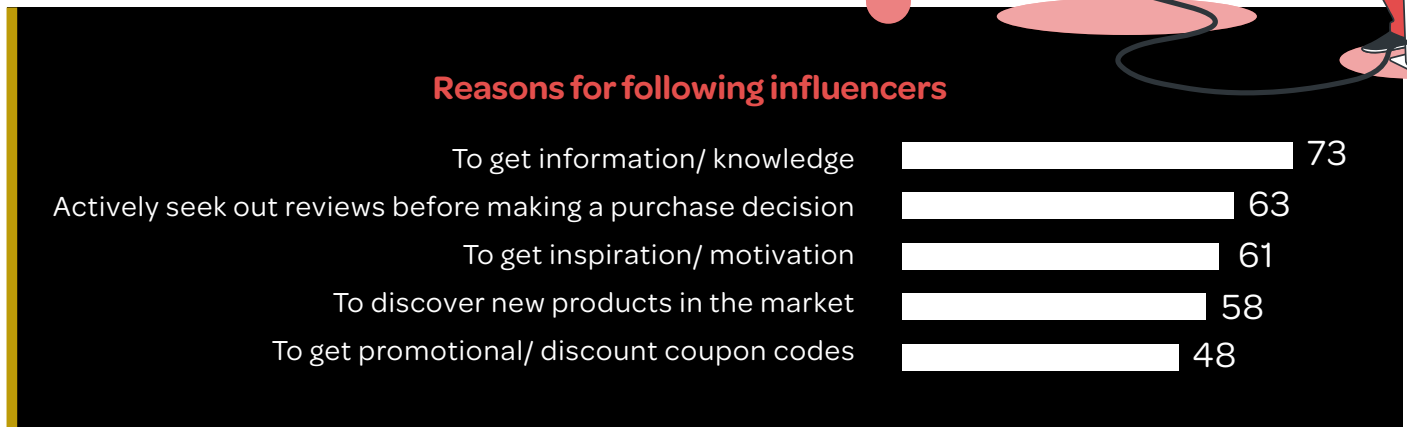


However, influencers connect with different followers on different platforms.

-  Younger cohort
-  Across all groups, especially among the less affluent 45-55 years old
-  25+ age group



Motivation for influencer followership

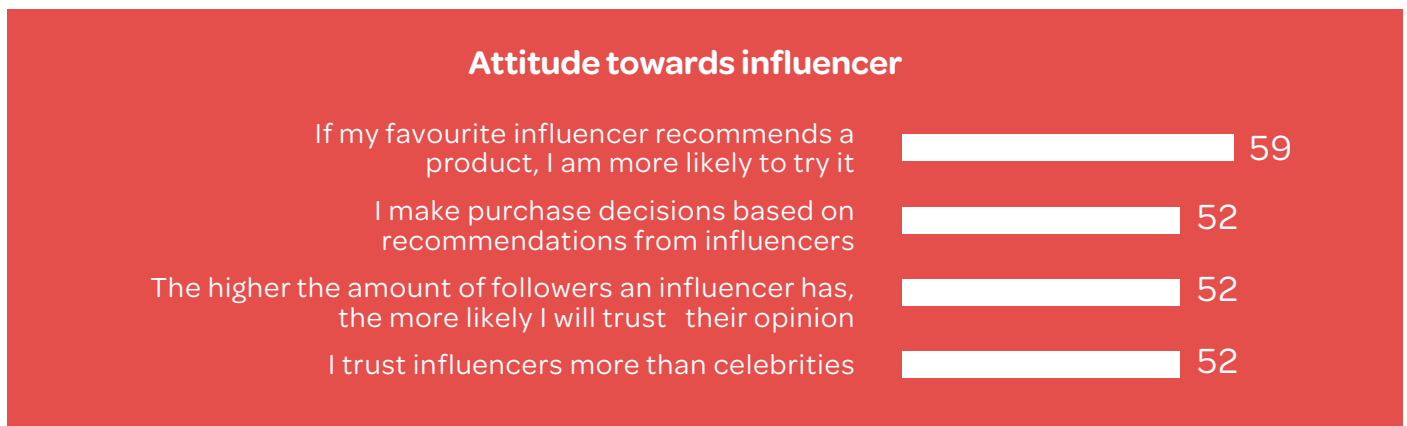


Interestingly, **knowledge seeking is a bigger trigger** compared to a purely commercial expectations such as promos/discounts.

For youth (aged between 20-24 and 25-34), influencers act as a source of inspiration and medium to discover new products. Promotional discounts are popular in 40L+ towns.

Attitude towards influencer followership

About 3 in 5 are likely to try a product based on influencers’ recommendation. However, this claim is more evident among the affluent and the old as they have the access to money and the products meet the needs of their life stage.



The impact of influencers encouraging trials or driving purchase decisions is also higher among the 45-55 years, NCCS A cohort which resonates with their life stage needs of health and wellness categories.

Influencers enjoy higher trust as compared to celebrities, especially among the 45-55 years old.

Attitudes towards influencer followership – By platforms

Attitudes towards influencers: Top 2 box % (Platform - Overall)	Overall	Facebook	YouTube	Instagram
To get information/ knowledge	73	-4	0	6
To discover new products	58	-2	3	3
Seek reviews before making purchase decisions	63	-1	-2	5
More likely to try products	59	0	1	0
To make purchase decisions	52	2	0	2
Higher the followers, more likely the trust	52	0	2	1
Trust influencers more than celebrities	52	-1	3	0
To get inspiration	61	-3	2	5
To get promotional/ discount coupon codes	48	0	3	-1



Gain knowledge and seek reviews which inspire consumers



Product discovery and increase in trials

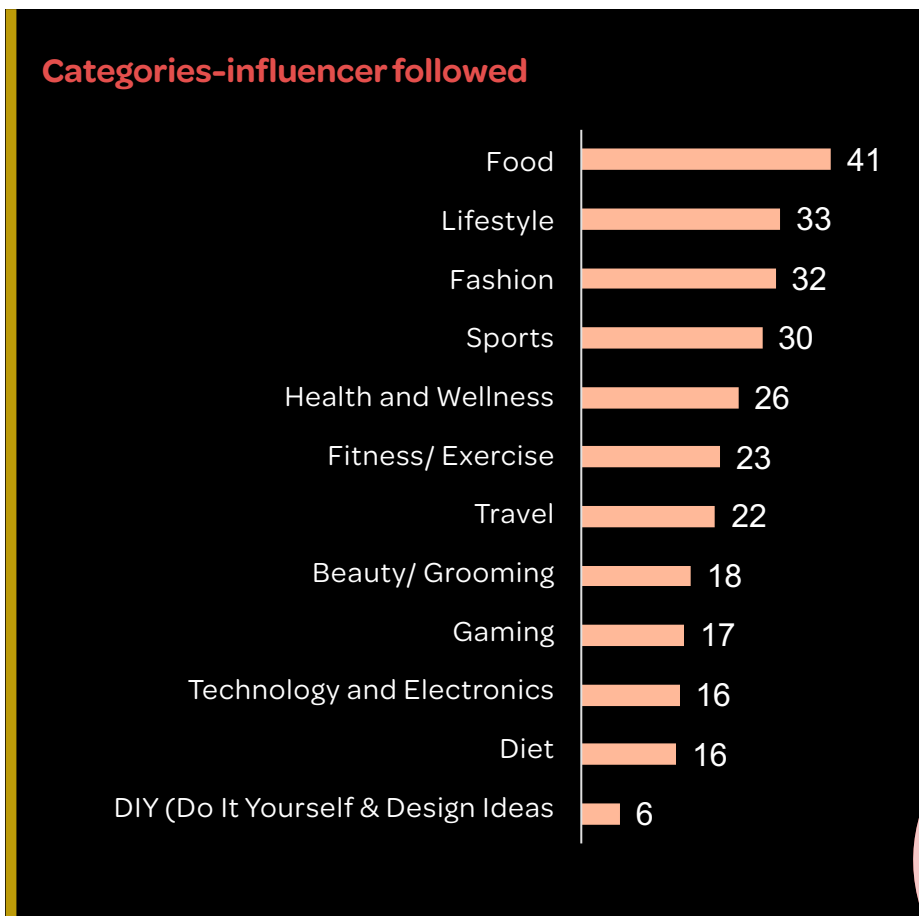


Drive purchase decisions

Attitudes towards influencers: Top 2 box % (Platform - Overall)	Overall	Moj	Snap-Chat	Share-Chat	MX Takatak	Josh	Roposo
To get information	73	-11	4	5	7	-3	20
To discover new products	58	-9	6	12	-9	-7	20
Seek reviews before making purchase decisions	63	-9	6	1	6	1	22
More likely to try products	59	-10	5	0	5	0	30
To make purchase decisions	52	-6	6	3	12	10	32
Higher the followers, more likely the trust	52	2	8	12	1	-7	28
Trust influencers more than celebrities	52	-7	4	2	-1	2	32
To get inspiration	61	-3	5	7	1	4	32
To get promotional/ discount coupon codes	48	0	10	10	12	-7	36

While seeking information is common motivation across most of the SFV platforms, users of SnapChat and MX Takatak would love to seek reviews on these platforms. Snapchat is over indexed on product discovery and Josh for making purchase decisions.

Genres for influencer followership



Influencers in the Food, Lifestyle and Fashion genres attract the most fan following.

Males are inclined towards following Sports, Fitness, Travel and Tech categories while Females follow Food, Lifestyle, Fashion, Beauty and Diet genres.



Genres for influencer followership – By platforms

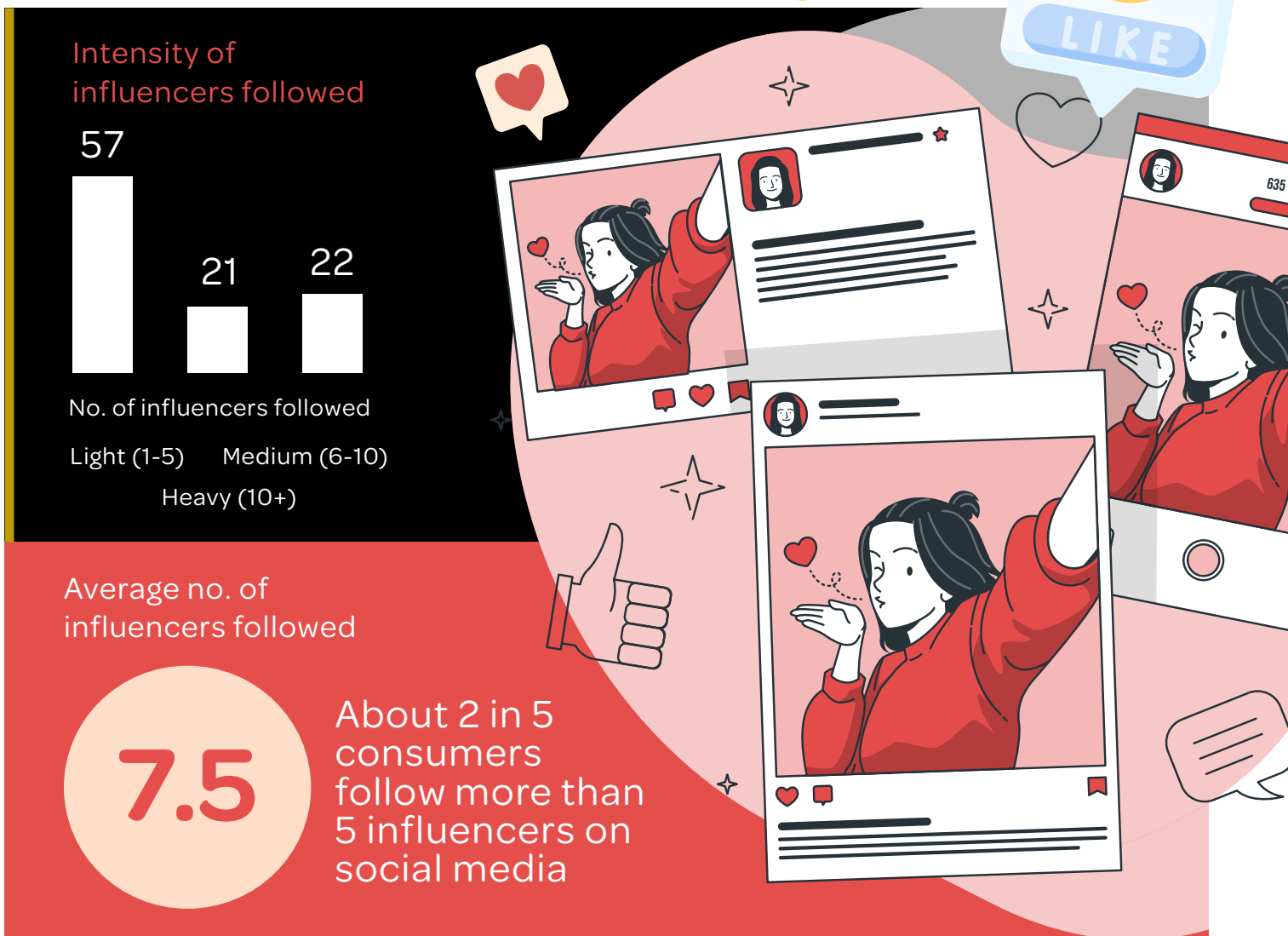
Categories - Influencers followed: Top 2 box % (Platform - Overall)	Overall	Facebook	YouTube	Instagram
Food	41	0	9	0
Lifestyle	33	2	-1	6
Fashion	32	3	-2	12
Sports	30	3	-1	6
Health and Wellness	26	5	4	1
Fitness/ Exercise	23	0	-1	7
Travel	22	-2	2	5
Beauty/ Grooming	18	-1	2	6
Gaming	17	-1	2	4
Technology and Electronics	16	-2	0	5
Diet	16	0	4	-1
DIY (Do It Yourself) & Design Ideas	6	0	1	3

Instagram is the go-to source for any genre of influencers but more profound for Fashion and Lifestyle genres. Food, Health & Wellness genres influencers are more likely to be followed on YouTube. Facebook influencers followership is driven by Lifestyle and Fashion genres.

Categories - Influencers followed: Top 2 box % (Platform - Overall)	Overall	Moj	Snap-Chat	Share-Chat	MX Takatak	Josh	Roopo
Food	41	5	20	9	9	24	19
Lifestyle	33	8	1	-3	-3	21	32
Fashion	32	6	11	19	19	21	20
Sports	30	1	8	7	7	7	5
Health and Wellness	26	9	8	14	14	25	18
Fitness/ Exercise	23	5	5	10	10	14	16
Travel	22	3	3	1	1	10	11
Beauty/ Grooming	18	15	11	10	10	14	38
Gaming	17	12	8	3	3	8	8
Technology and Electronics	16	3	2	4	4	0	16
Diet	16	14	15	6	6	12	27
DIY (Do It Yourself) & Design Ideas	6	5	-3	0	0	-1	-4

No clear differentiation is visible for different genres across SFV platforms.

No. of influencers followed on social media



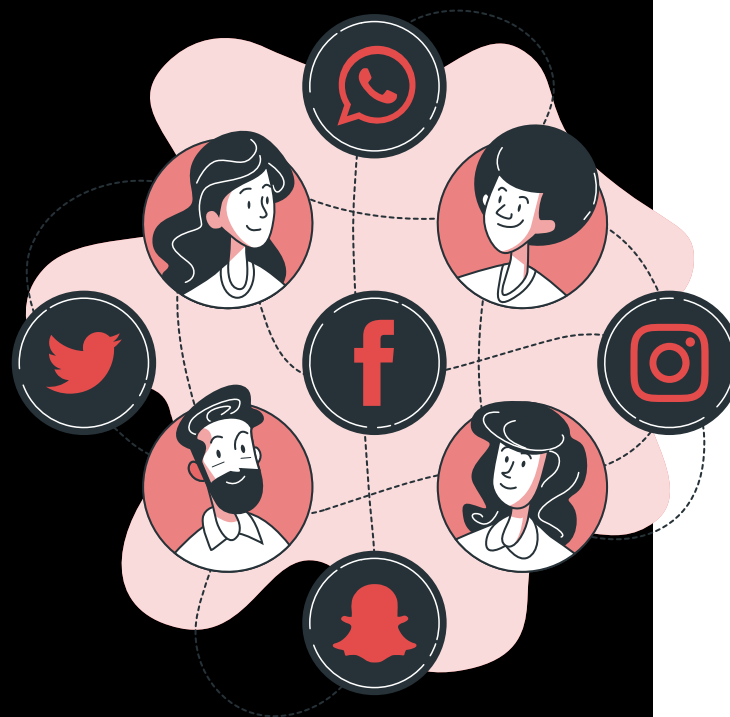
Conclusion

The study has identified that the way marketing strategies are implemented has undergone a radical change as a result of the growth in social media and the internet in India. Influencers are now crucial in the process by which consumers make their purchasing decisions, as they have a direct or indirect impact on consumers' attitudes and decisions due to their unique skills, specialised knowledge, or personalities.

Influencers Reach - According to our survey, influencers reach more than one out of every four people in the India consumer universe, totalling 54.9 million people. And about 2 in 5 consumers in India follow more than 5 influencers on social media.

Instagram, YouTube and Facebook - These social media platforms are still the popular platforms preferred by consumers to connect with influencers. Influencers, on the other hand, connect with different followers on different platforms. Instagram is the go-to platform for research and finding consumer-inspiring reviews. Influencers on YouTube would lead to product discovery and an increase in trials, whereas Facebook would play a significant role in purchase decisions.

Food, Lifestyle and Fashion - The most devoted followers are drawn to these categories. Males tend to follow categories like sports, fitness, travel, and technology, while females tend to follow categories like food, lifestyle, fashion, beauty, and diet.



Thousands of influencers are using their platforms to provide information and aid consumers in making purchasing decisions, thanks to the strength and growth of social media and the internet in India. This has demonstrated that utilising influencer marketing for marketers is the most practical way to assist customers to get the best they want.



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INCA is GroupM's brand-safe influencer and content marketing solution. Using proprietary technology, in-house experts, and a network of industry-leading partners, INCA provides influencer selection and content production services, as well content distribution at scale across social and publisher platforms. Our creator partnerships, campaign workflows, and active reporting tools assure full control and brand safety for advertisers and their agencies, while helping them optimize their campaigns towards measurable business outcomes. INCA is part of GroupM, the world's largest media investment company, and has operational teams active in 30 markets around the world.

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