Building better connections:

Using influencers to grow your brand

Nielsen

Introduction

Many social media platforms have undergone impressive growth in the past few years—as the pandemic drove people indoors, in front of screens and searching for connection.

To address this need, many brands are spending big on social media, turning to influencers to make more personal (and profitable) connections with consumers. The **2022 Nielsen Annual Marketing Report**, for example, found that global marketers are increasing social spend by 53% in the next year, more than any other channel. Yet, as brands make major investments in the world of influencer marketing, the ever-growing number of influencers creates a complex landscape for marketers to navigate.

To help in your decision-making process, we used Nielsen InfluenceScope to gather key trends and insights into the current social media influencer landscape and the population of influencers across three of the platforms most used by influencers: Instagram, TikTok and YouTube. We highlight:

- **Who—or what—are influencers?**
- **How influencers engage with audiences**
- **What is the global distribution?**
- **Who are the top influencer personas across platforms?**

What does it mean to be an influencer?

influencer

/ ˈin-ˌflü-ən(t)-sər /

noun

A social media user with over 1,000 followers/ subscribers exercising influence, on digital platforms, over digital users and audiences

We like to think of an influencer as an internet celebrity; a personality with a large and engaged enough audience who can influence consumer sentiment and behavior around their affiliations and interests. While most influencers are humans, animals (hello Nala Cat) or even virtual influencers like Lil Miquela can help brands connect with their target audiences.

And those connections can be powerful. In fact, according to the 2021 Nielsen Trust in Advertising study, 71% of consumers trust advertising, opinions and product placements from influencers.

Marketing channel and consumer trust

Completely or somewhat trust ranked

Channel	% Trust
Recommendations from people I know	89%
Branded websites	84%
Ads on TV	78%
TV program product placements	74%
Advertising/opinions about brands/ product placements from influencers	71%

Don't trust much and don't trust at all ranked

| Channel	% Don't trust
Online banner ads	38%
Ads on social media networks	36%
Ads served in search engine results	36%
Ads on mobile devices	34%
Online video ads	33%

Source: Nielsen 2021 Trust in Advertising study

Given the propensity for these influencers to be effective brand ambassadors, and help drive product awareness, it's easy to understand why marketers are increasingly adding influencers to their marketing mix. The power of an influencer is in their followers, and celebrities like Dwayne Johnson have tremendous reach. But if The Rock's followers aren't your target audience, the impact of his celebrity—and your marketing dollars—will be limited. So how can brands know which influencer is

right for which campaign? The struggle is real for many, as identifying an influencer that fits the brand's personality and purpose is something that 86% of Nielsen's clients represent as a challenge.

But with the right data, it's easier to make the connection between brands, influencers and consumers that reveals the power of influence marketing.

U.S. marketers embrace emerging platforms
Usage by platform
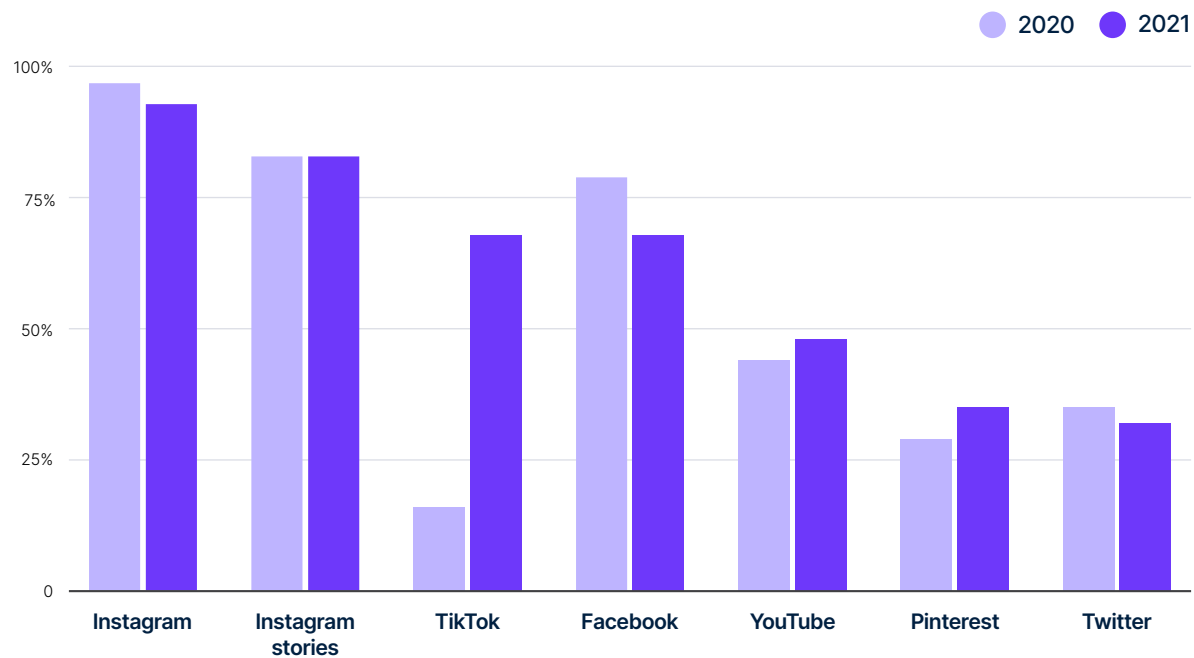
Source: Linqia: The State of Influencer Marketing 2021

Social media platforms play a critical role in shaping the influencer marketing dynamic. And as the industry grows to satisfy consumer demand for content, marketers need to keep an eye on, and differentiate between, which social platforms are emerging and which are driving the most engagement. Because when it comes to influencer marketing, engagement is key.

According to Nielsen InfluenceScope, a solution suite that measures social media influencers, 72% of influencers currently use Instagram as their primary content channel, although many creators tend to have accounts on multiple digital platforms. Meanwhile, TikTok is booming—68% of U.S. marketers invested in the platform in 2021, up from 16% in 2020—and emerging as a cross-platform audience booster.

The most-followed creators on TikTok, for example, are quickly becoming popular personalities across the social media universe. Italian-based influencer Khaby Lame

[1] Nielsen InfluenceScope

is the second-most followed creator on TikTok globally. He has now become one of the most followed creators on Instagram as well, with over 75 million followers at less than 300 posts on the platform—overtaking one of the most influential fashion bloggers worldwide, Chiara Ferragni, with 27 million followers at nearly 16,000 posts.
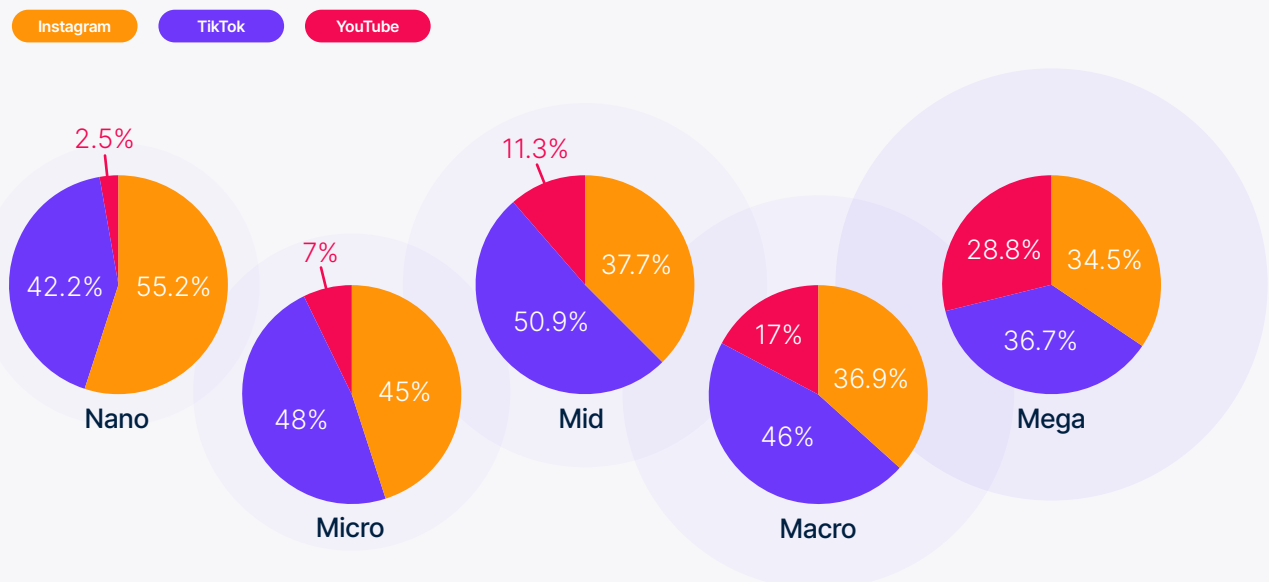
Influencer tier

Tier	Followers	Traits
Nano	1k-10k	High engagement and low cost; local connections
Micro	10k-50k	Niche content; low cost, uniform audience
Mid	50k-100k	Strong brand partnerships; cost effective
Macro	100k-1M	Famous internet personalities; broad reach
Mega	>1M	Celebrities; high cost, vast reach

Both Khaby Lame and Chiara Ferragni are mega influencers, but not all creators have such a large follower base. And marketers need to be able to know where to find creators with audiences from Nano to Mega, to maximize the impact of their messaging and their spend.
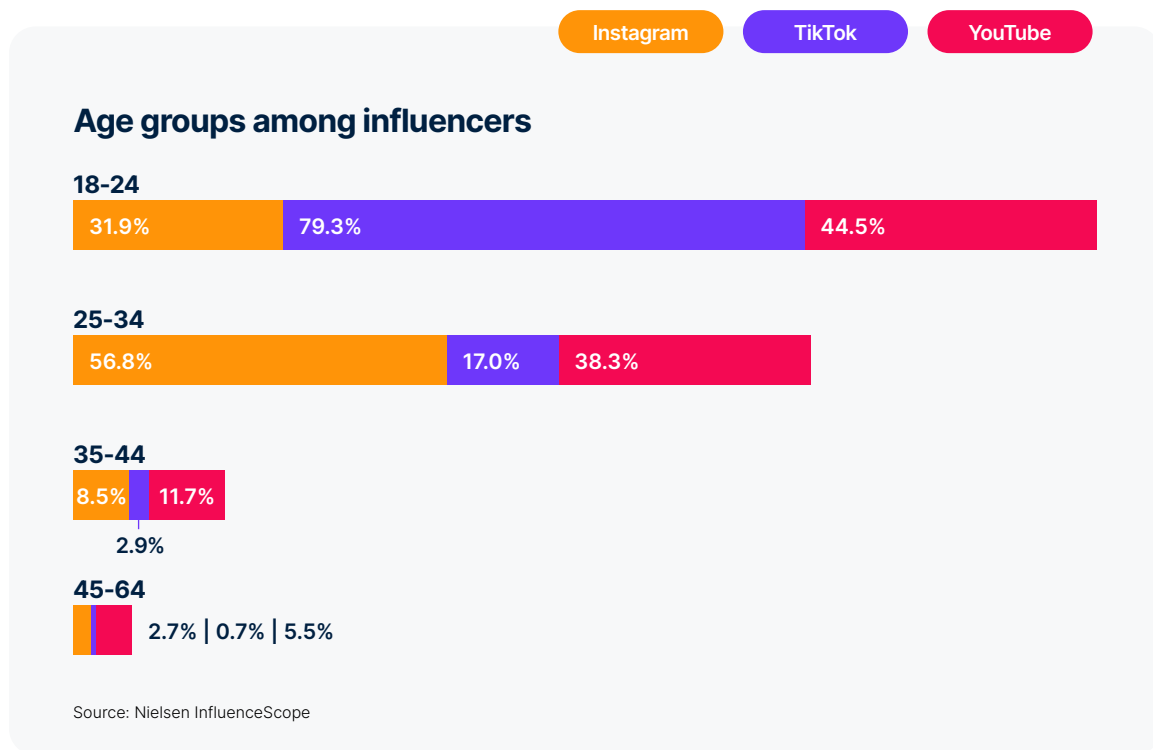
Influencer tiers across platforms

Instagram   TikTok   YouTube

Nano: 2.5%, 42.2%, 55.2%
Micro: 7%, 48%, 45%
Mid: 11.3%, 50.9%, 37.7%
Macro: 17%, 46%, 36.9%
Mega: 28.8%, 36.7%, 34.5%

Source: Nielsen InfluenceScope

From an influencer perspective, Instagram dominates the Nano tier with 55.2% of total influencers. Notably, newer platform TikTok has overtaken social media veteran Instagram in popularity for Micro, Mid, Macro and Mega influencers. YouTube attracts fewer influencers in general than other platforms, but its share of Mega influencers (28.7%) is comparable to those of Instagram (34.5%) and TikTok (36.7%).

How old are influencers?

Age groups among influencers

| Instagram | TikTok | YouTube |

18-24
31.9% | 79.3% | 44.5%

25-34
56.8% | 17.0% | 38.3%

35-44
8.5% | 2.9% | 11.7%

45-64
2.7% | 0.7% | 5.5%
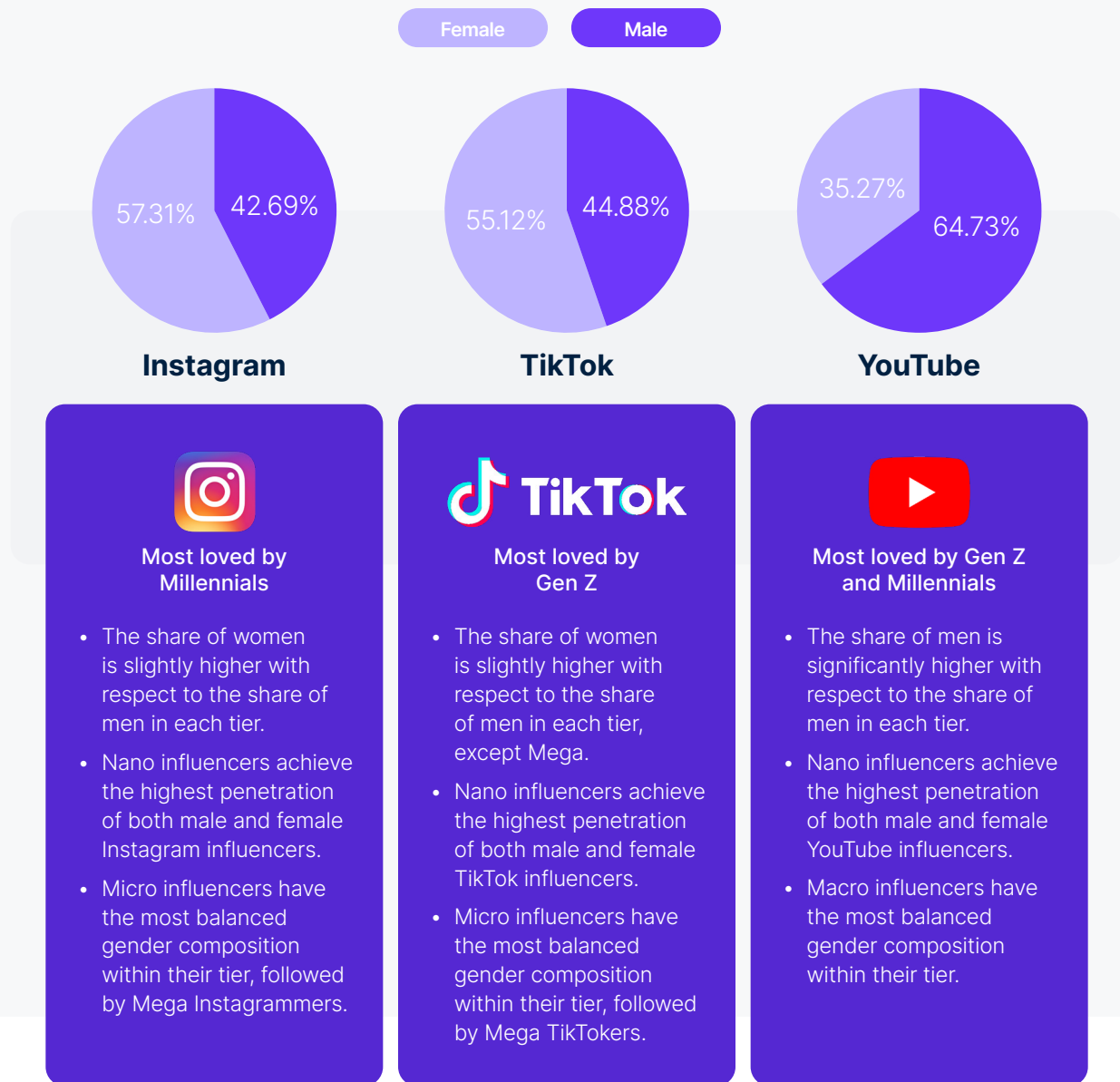
Source: Nielsen InfluenceScope

With digital content creation being a relatively new profession, almost 90% of all influencers on the major platforms are between 18 and 34 years old, with TikTok taking a strong lead at 79%. But TikTok's appeal to younger creators hasn't translated for more seasoned influencers quite yet. Instagram leads the pack for influencers 25-34 years old with 56.8%, while YouTube is most popular among creators aged 35-64.

And when it comes to influencer advertising, age isn't just a number. Engaging influencers of the right age on the right platform can pay off when you're trying to reach your target audience. For example, during Gap's #brownhoodie campaign, 60.36% of TikTok star Barbara Kristoffersen's engagement came from women aged 18-24. Instagram has the highest share of 25 to 34 years olds, accounting for approximately half of the influencers on the platform with 50.62%. As a result, 33% of the Instagram users who engaged with the #brownhoodie campaign were women 25-34.

Influencers demographics

When it comes to the demographic characteristics of their creators, social media platforms differ widely. While Instagram and TikTok are generally female-dominated platforms with a significantly younger audience, YouTube is highly dominated by male influencers—and has slightly more influencers who are older in age.

Female creators favor Instagram and TikTok

| Female | Male |

Instagram
- 57.31%
- 42.69%

TikTok
- 55.12%
- 44.88%

YouTube
- 35.27%
- 64.73%

Instagram
Most loved by Millennials

- The share of women is slightly higher with respect to the share of men in each tier.
- Nano influencers achieve the highest penetration of both male and female Instagram influencers.
- Micro influencers have the most balanced gender composition within their tier, followed by Mega Instagrammers.

TikTok
Most loved by Gen Z

- The share of women is slightly higher with respect to the share of men in each tier, except Mega.
- Nano influencers achieve the highest penetration of both male and female TikTok influencers.
- Micro influencers have the most balanced gender composition within their tier, followed by Mega TikTokers.

YouTube
Most loved by Gen Z and Millennials

- The share of men is significantly higher with respect to the share of men in each tier.
- Nano influencers achieve the highest penetration of both male and female YouTube influencers.
- Macro influencers have the most balanced gender composition within their tier.

These charts omit the 'gender neutral' category which includes people, brands and pages that did not choose to identify as 'male' or 'female'.

Source: Nielsen InfluenceScope

Audience interests should drive strategy

We outlined 28 categories to identify what intrigues and motivates Instagram followers. Analyzing the top five audience interests per influencer type, we found out that Nano and Micro influencers' followers are mostly interested in clothes, shoes, handbags and accessories—while for Mid, Macro and Mega influencers' audience, friends, family and relationships are the most popular categories.

Apart from influencer demographics, brands need this in-depth knowledge of audience interests to develop effective influencer marketing strategies. Because if your influencer's followers don't have a basic interest in your product, your campaigns will struggle to produce optimal results, even with a mega influencer.

Interestingly, American pop singer Justin Timberlake has 65 million followers on Instagram. As one of the world's best-selling musical artists, winning numerous awards and accolades, many might expect his followers to be most interested in music. However, 42% of Timberlake's followers are keen on friends, family and relationships.

## Better connections, greater influence

Brands are looking to influencers—and the significant engagement that many of them wield across YouTube, Instagram and TikTok—to establish more personalized connections with consumers.

For marketers, the proof of influencer ad engagement is clear. Nielsen's Brand Impact service has measured the effectiveness of influencer ads in nearly 200 campaigns. According to the Q1 2022 norms from this research, an average of 80% of influencer ad viewers were able to recall seeing the brand featured in the ads. Further, the influencer ads drove a nine-point increase in both brand affinity and purchase intent relative to consumers who did not see the influencer ads.

Different social media platforms focus on different types of content and different ways for audiences to engage with that content. For example, as Instagram is primarily a photo-sharing app with likes and comments as the primary engagement actions, while TikTok and YouTube are video content publishing platforms—on which sharing plays a larger role in determining engagement levels, and views are the main indicator of identifying potential reach.

Engagement rate range across platforms
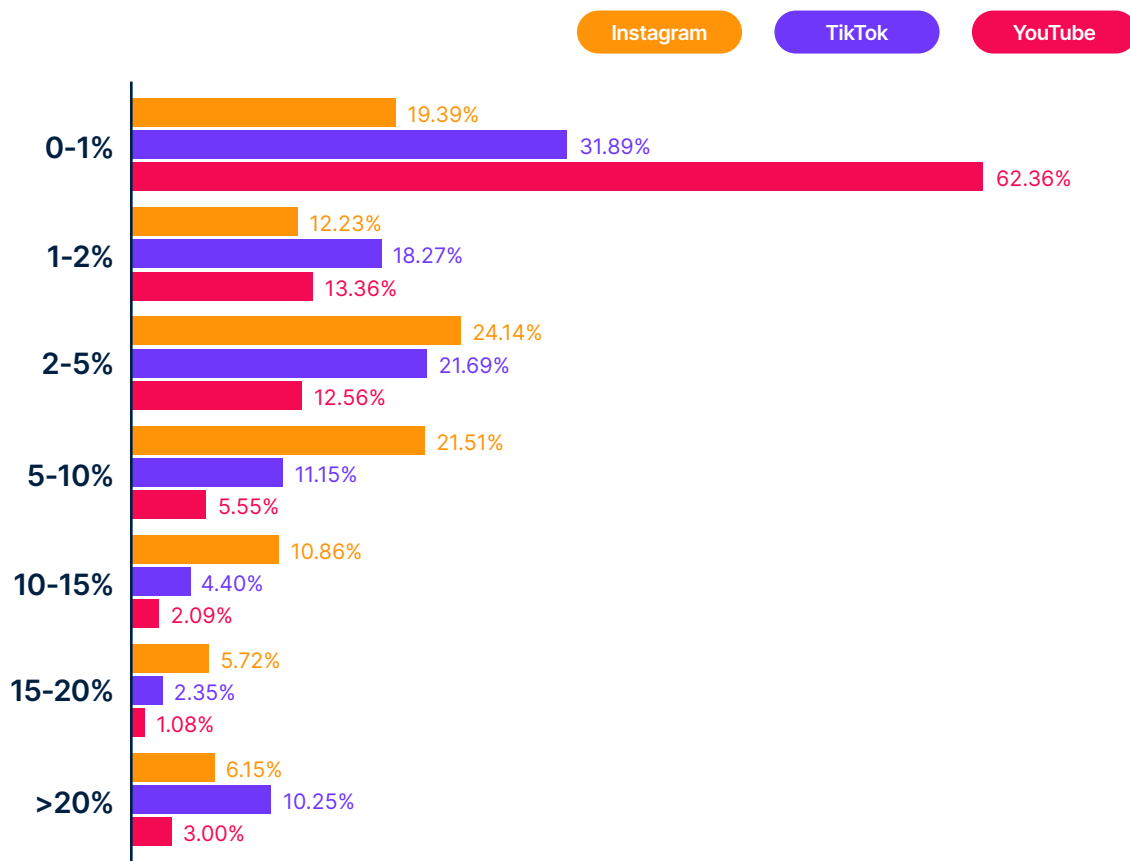
Source: Nielsen InfluenceScope

Given the shift in preference toward shorter videos and vertical formats, TikTok has an impressive engagement rate: influencers with engagement rates of more than 20% make up 10.25% of the creators on the platform, compared with 6.15% for Instagram and 3% for YouTube.

Comparatively, Instagram holds the highest share of influencers with engagement rates of 2% to 20%, with creators with engagement rates of 2% to 5% representing nearly one-fourth of the platform's influencers.

And when brands hit the right combination of influencer, content and engagement, the results can be powerful.

In January 2022, HUGO BOSS launched its international #BeYourOwnBoss campaign on social media to refresh the brand. The campaign engaged popular influencers like top model Kendall Jenner, TikTok persona Khaby Lame and Australian actor Chris Hemsworth to wear the signature BOSS hoodie and create a buzz on Instagram.

And it worked. The campaign gained approximately 18 million interactions and included more than 200 influencers posting images of themselves wearing the BOSS hoodie. German footballer Grischa Promel, Indian mountaineer Poorna Malavath and Italian tennis player Matteo Berrettini, are the three influencers who achieved more than a 25% engagement rate, much higher than the platform's average engagement rate of 2% to 10%.

The relaunch also made a significant impact on the BOSS official Instagram, garnering the brand more than 100K new followers in the first three days of the campaign.

Distribution across the globe

As the pandemic inspired higher traffic on social media platforms, influencers of every size are emerging globally—with the biggest share (over 13.5 million) coming from the U.S., with the majority of influencers active on Instagram, although Brazil tops the list for Instagram influencers at over 10.5 million. The U.S. holds first place for TikTok and YouTube creators, with Brazil coming in second, slightly ahead of Indonesia.
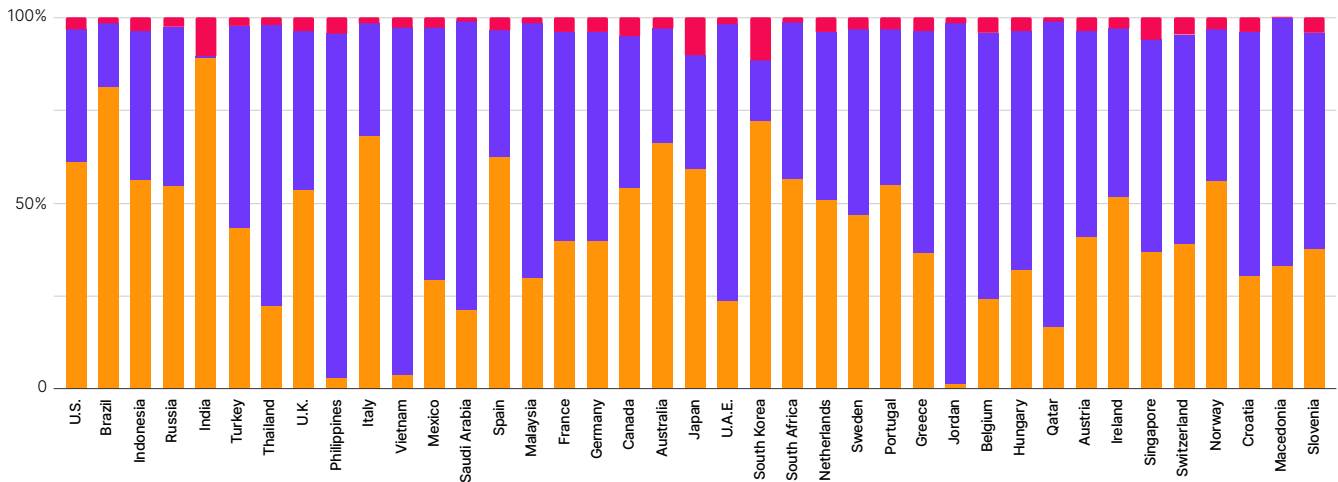
Geographical distribution of influencers per platform

Instagram · TikTok · YouTube
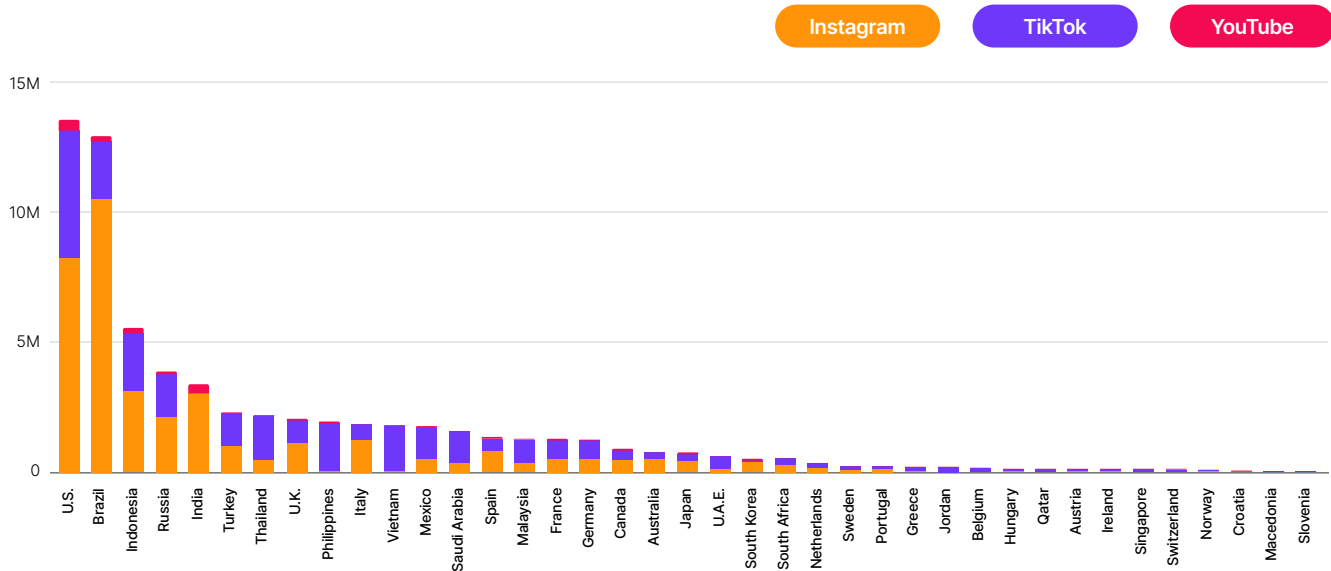
Source: Nielsen InfluenceScope

Geographical density of influencers per platform

Source: Nielsen InfluenceScope, November 2021-April 2022

For influencer density per country, TikTok takes the biggest share of influencers in APAC territories, such as the Philippines and Vietnam, where TikTok influencers make up approximately 93% and 94% of creators, respectively.

Influencers across the globe

Instagram

**followers**

1. **Cristiano Ronaldo** - *@cristiano*	453M	
2. **Kylie Jenner** - *@2kyliejenner*	333M	
3. **Leo Messi** - *@leomessi*	323M	
4. **Selena Gomez** - *@selenagomez*	316M	
5. **Dwayne Johnson "The Rock"** - *@therock*	312M	
6. **Ariana Grande** - *@arianagrande*	307M	
7. **Kim Kardashian** - *@kimkardashian*	306M	
8. **Beyoncé** - *@beyonce*	253M	
9. **Khloé Kardashian** - *@khloekardashian*	238M	
10. **Kendall Jenner** - *@kendalljenner*	234M	

TikTok

fans

1. **Charli D'Amelio** - *@charlidamelio*	140M	
2. **Khabane Lame** - *@khaby.lame*	137M	
3. **Bella Poarch** - *@bellepoarch*	89M	
4. **Addison Rae** - *@addisonre*	88M	
5. **Will Smith** - *@willsmith*	72M	
6. **Zach King** - *@zachking*	68M	
7. **Kimberly Loaiza** - *@kimbery.loaiza*	62M	
8. **Dixie D'Amelio** - *@dixiedamelio*	57M	
9. **cznburak** - *@cznburak*	57M	
10. **Spencer X** - *@spencerx*	55M	
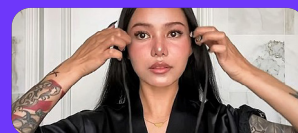
YouTube

subscribers

1. **T-Series** - */T-Series*	214M	
2. **Cocomelon Nursery Rhymes** - */Cocomelon*	134M	
3. **SET India** - */SetIndia*	132M	
4. **PewDiePie** - */pewdiepie*	111M	
5. **Mr. Beast** - */mrbeast*	95M	
6. **Kids Diana Show** - */kidsdianashow*	94M	
7. **Like Nastya** - */likenastya*	91M	
8. **WWE** - */wwe*	88M	
9. **Zee Music Co.** - */zeemusiccompany*	84M	
10. **Vlad and Niki** - */vladandniki*	81M	

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Influencer data drives key insights for marketers

With social platforms only gaining in popularity, it's clear that influencer marketing can be a major revenue generator. And brands that are able to dial in the right combination of influencer, platform, content and interest can create connections that drive engagement—and ROI.

And given the wealth of audience, influencer and consumer sentiment data available for social media, marketers can now take a data-driven approach to their influencer marketing strategies. Brands have access to a scientific approach to calculate influencer marketing ROI and to continuously assess campaigns in real time to deliver better outcomes.

Report methodology

Leveraging our Nielsen InfluenceScope tool, we have collected and summarized insights about social media influencers and their audiences across Instagram, TikTok and YouTube.

Influencers of all ages nationality, language preference and creator category who have posted in the last six months (i.e., November 2021 to April 2022) across social media platforms have been taken into account in this study. All influencer tiers (i.e., Nano, Micro, Mid, Macro, Mega) have been analyzed based on the same methodology in order to ensure the delivery of robust and consistent results.

InfluenceScope is Nielsen's data-driven solution to support marketers throughout the entire influencer marketing lifecycle. We assess social media users with over 1,000 followers or subscribers who exercise influence on digital platforms or over digital audiences. We select personalities that match brand campaign objectives and measure the value of partnerships, helping brands maximize the ROI of influencer marketing.

Editor's note

This report has been updated from its original version. We updated the report May 26, 2022, and initially published it on May 17, 2022.