



State of Influencer Marketing 2021

with Q1 2021 update





State of Influencer Marketing 2021





DIGITAL IN 2020: NEW CHALLENGES, NEW MILESTONES

The digital and social landscape is evolving so fast that it can be hard to stay abreast of all changes. 2020 was indeed a big year in every sense. Before we share the key findings of our report, let's look at some of the most significant events of the year that affected the influencer marketing environment.

1 COVID-19 offers opportunities for influencer collaborations

According to [Nielsen Insights](#), social distancing and quarantining brought to the increased amount of content people consume worldwide. For brands, it can be a good opportunity to create impactful messages for their audience with the help of influencers. Being a part of the global social community, businesses can establish stronger relationships with consumers.

2 Creators find new ways to make money

Since many brands cut their ad spend due to COVID-19, influencers had to change their business models and seek new ways to earn money, including merchandise, direct-to-consumer offers, and content production deals. Many influencers rushed to the OnlyFans platform, which was originally designed to offer fans exclusive access to their favorite creators based on paid subscriptions.

3 Online shaming is spiking during the pandemic

Some influencers faced social media shaming for not social distancing. Creators who posted content about their activities during the quarantine received massive criticism from the community. Being accused of their irresponsible behavior, some influencers even said about cases of death threats.

4 Influencers leverage their messaging for social good

If creators want to stay influential, they need to stand for a worthwhile cause. That's why some influencers work with nonprofits either at a discounted rate or for free, while others post supportive content and resources related to COVID-19.

5 Influencers reconsider their content in the times of the BLM movement

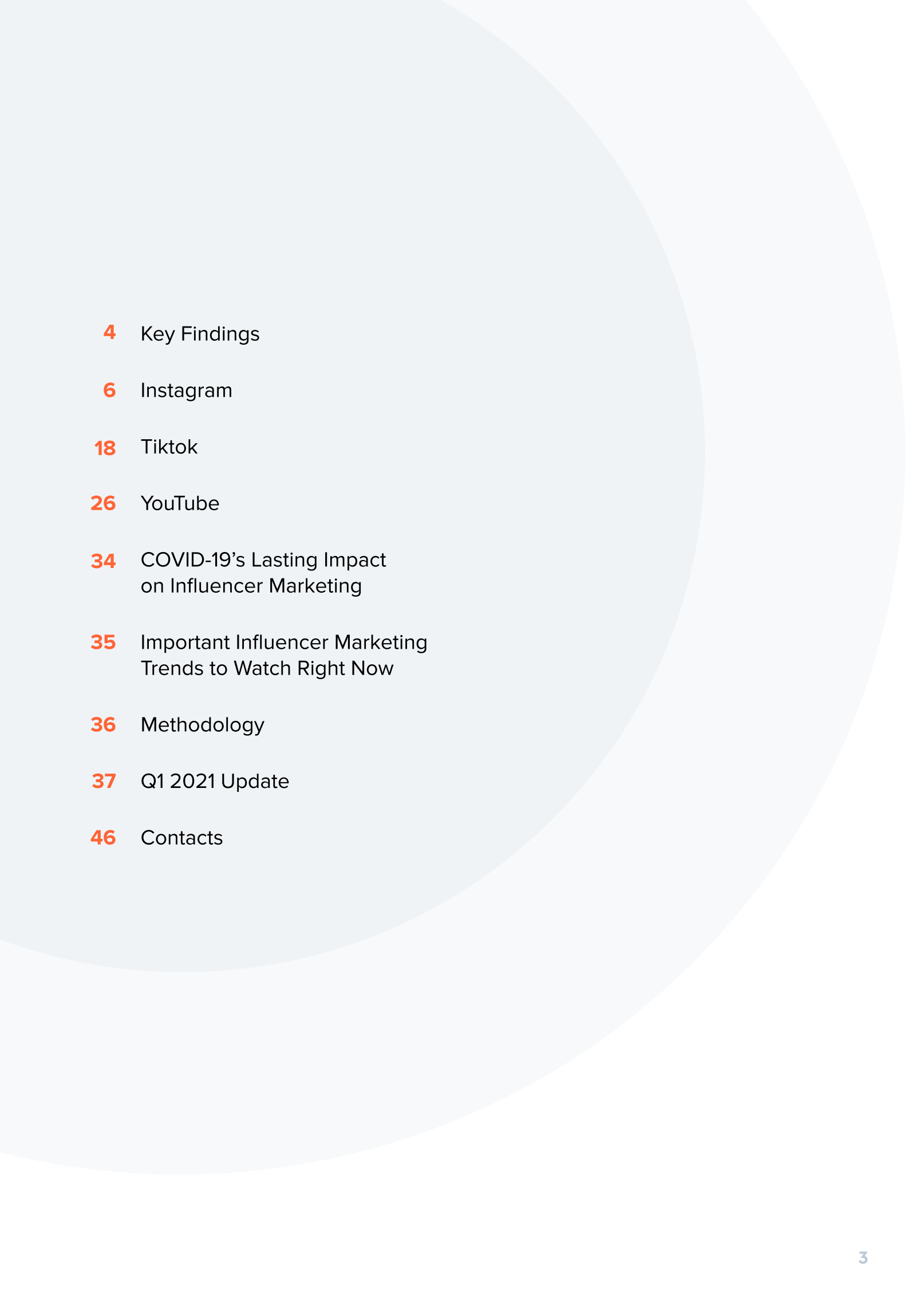
It's difficult to stay out of the conversation when you are an influencer. The social media community wants to engage with brands and creators that use their influence to discuss the current climate. In 2020, the social media space has become a venue for Black Lives Matter activism, and influencers adapt their content to address racism.

6 Online creators become an asset for political campaigns

With social media only growing in prominence, getting support from influencers can be a powerful campaign tactic for political candidates. And the strongest support may come not from celebrities, but micro-influencers who talk to smaller but more targeted audiences. People tend to view these creators as more trustworthy and therefore listen to their opinion.

7 TikTok was banned in India leaving many creators without their main source of income

On June 29, India banned TikTok, which comes as an unpleasant surprise to many Indian influencers. After the ban, several apps took a shot to occupy the vacant spot, but none of them came even close, according to creators. TikTok was set to be banned in the US on November 12, however, TikTok creators managed to block the app ban with a lawsuit.



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Key Finding 1 | page 8

The Instagram influencer market expected to grow 15% in 2021.

The estimated global market capitalization in 2021 equals \$5869.46M which implies 15% growth from \$5095.51M estimated for the end of 2020.

Key Finding 2 | page 9

43% of global Instagram users are aged between 25 and 34 Years.

More than half of global audiences are 34 and younger (80.9%), which makes Instagram worthwhile for brands and marketing specialists.

Key Finding 3 | page 15

The average percent of Instagram accounts involved in fraud decreased by 8.14%

But the number of influencers involved in fraud is still very high (55.39%). Fake influencers and engagement could cost advertisers millions of dollars each year.

Key Finding 4 | page 17

On average, you will get \$4.87 of earned media value for each \$1 you pay for

Instagram influencers promotion. EMV or Earned Media Value is the accepted advertising industry standard for measuring PR activities and influencer marketing campaigns.

Key Finding 5 | page 20

More than half of TikTok users (69%) are under the age of 24 with 39% between 18 and 24, which makes people of this age the largest user group. In this age group, 24% of users are female and 13.9% are male.

Key Finding 6 | page 21

41% of TikTok creators are nano-Influencers with 1,000–5,000 subscribers.

The TikTok influencer landscape differs from what we see on Instagram. Over 41% of TikTok creators are Nano-influencers who have from 1,000 to 5,000 subscribers.

Key Finding 7 | page 28

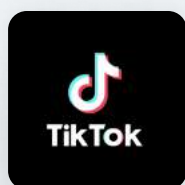
66% of YouTube users are aged between 18 and 34. However, the platform doesn't just appeal to grown-up audiences. Teenage users are the third largest group accounting for almost 14% of all YouTube viewers.

Key Finding 8 | page 34

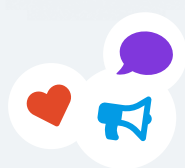
COVID-19 made its adjustments and slowed down the growth of the industry, but Influencer Marketing didn't suffer as much as other industries.



Active Social Media Users have increased by 10.5%



The most significant boost received was TikTok with its **60% increase**



Social Media Users	+10.5%	3960M
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Instagram	+12%	1082M
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TikTok	+60%	800M
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YouTube users	no changes	2000M
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Q3 2019 vs Q3 2020.

Figures are based on addressable advertising audience and may not match the total number of active users



79% of Marketing Specialists Consider Instagram Important for Their Influencer Marketing Campaigns

When it comes to influencer marketing, Instagram is a perfect place to reach new audiences and gain direct access to target markets. Over 1 billion people use Instagram every month.



Instagram creators open up huge opportunities for businesses looking to market their products and services in an authentic way. 79% of marketing specialists consider Instagram important for their influencer marketing campaigns, which makes it the most popular social media channel for influencer marketing. And 62% of marketers say they've seen an increase in sales when working with social media influencers on an online advertising campaign.

It comes as no surprise. Influencer marketing on Instagram removes the barriers of traditional advertising because customers get to know about your brand from someone they trust. And it happens on an authentic platform they use on a daily basis. When a creator recommends a product or service, it comes across as a credible recommendation, and this is a great advantage for brands.



Instagram Updates 2020: Reels, Automated Closed Captions, Live Ads and Badges

Instagram Reels



Responding to the trending TikTok format, the platform added its own Instagram Reels that allows users to record and edit 30-second multi-clip videos with audio and effects. It provides great opportunities for influencers to express their creativity in a new format..

Automatic Closed Captions for IGTV Videos



When uploading their IGTV videos, Instagram creators now have the option to use "auto-generated captions" which are generated by automatic speech recognition. Although automatic captioning isn't 100% accurate, it improves as more people use them and it increases accessibility overall.

New Branded Content Capabilities



Instagram announced several updates to Branded Content to make it easier for creators to produce and share their branded content. First of all, it added Branded Content Tags for Reels and Live to expand its revenue options for creators. Also, to help brands provide a seamless shopping experience, Instagram introduced the ability for businesses to promote branded content posts with product tags.

The Rights Manager is Extended to Instagram



Facebook's Rights Manager is extended to Instagram, allowing users to protect and manage their image content. The tool uses visual search features and allows you to find any of your copyrighted images across Instagram. Influencers are most likely to benefit from this feature, as they are typically those whose content is used by others without permission.

Live Ads and Badges



To give fans another way to participate and show their love, Instagram introduced badges that viewers can purchase during a live video.

Creators Can Now Build AR Effects with Music



Spark AR, Instagram's augmented reality platform, now includes the option to add audio effects and makes it possible to create AR effects that alter photos and videos from the camera roll.



The Instagram Influencer Market Expected to Grow 15% in 2021

The estimated global market capitalization in 2021 equals **\$5869.46M** which implies **15%** growth from **\$5095.51M** estimated for the end of 2020.



\$5,245,364,060

reached the global market capitalization in 2019 with the estimated media count equaling **6,851,332** sponsored publications



According to HypeAuditor, the Instagram Influencer Marketing market reached **\$5095.51M** by the end of 2020. This means that globally the industry will not outgrow the year 2019, however, its decline cannot be characterized as a drastic one.



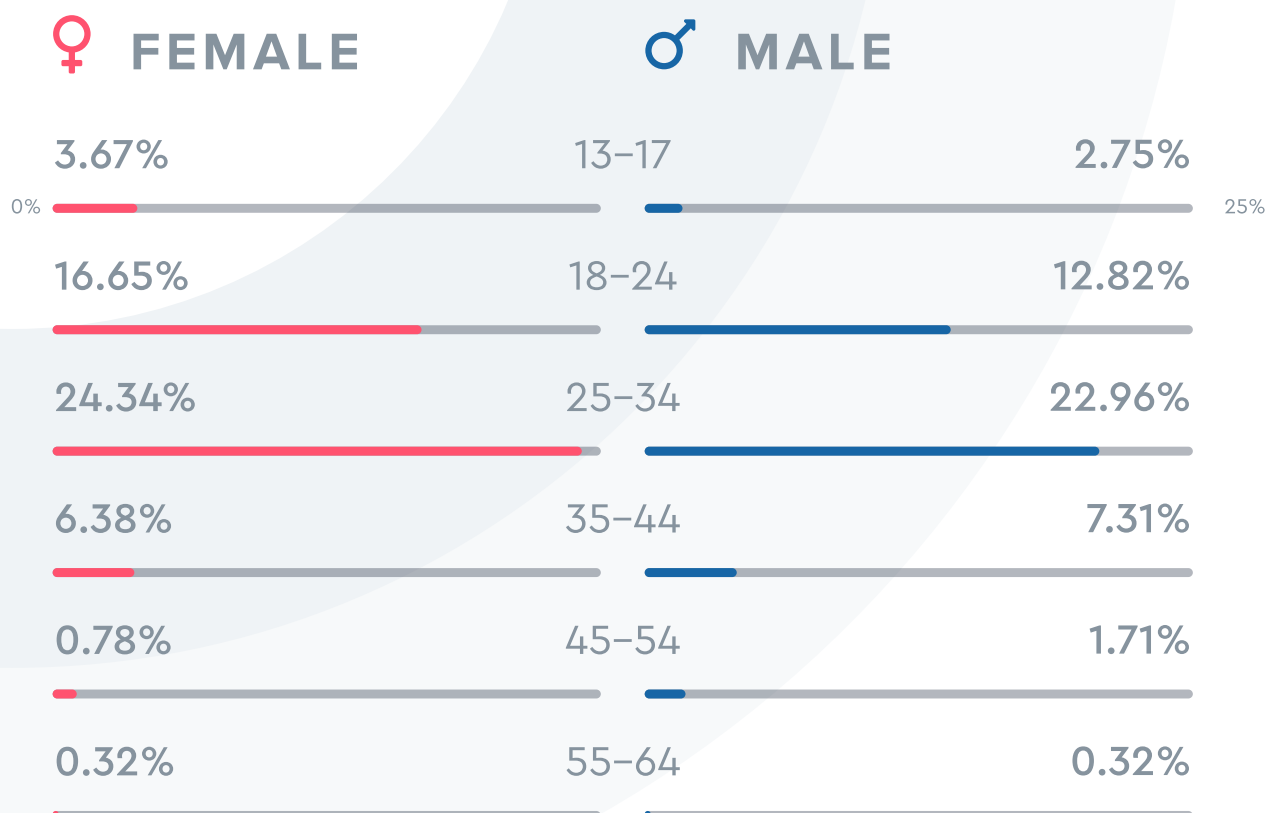
The overall market capitalization is subject to change depending on how fast advertisers will resume influencer marketing activities and on the further development of the pandemic.



What is certain is that the speedy elimination of COVID-19-related restrictions will allow many categories of content creators to restart their work (e.g., travel, event-related categories) which will subsequently boost the market recovery process.



47% of US Instagram Users are between the Ages of 25 and 34 Years Old



User demographic data for any social media you work with is an essential element of a successful influencer marketing strategy. Knowing who's on the platform helps businesses and brands better research, analyze, and plan.

Research reveals that

- 🔥 Around 47% of US Instagram users are aged between 25 and 34 years
- 🔥 24.3% of this age group are female and 23% are male
- 🔥 More than half of audiences from the US (80.9%) are 34 and younger, which makes Instagram worthwhile for brands and marketing specialists



Distribution of Instagram Influencers by Categories in the US: Lifestyle Content Takes the Lead

Category	2020,%
Lifestyle	8.98
Music	6.61
Family	4.87
Beauty	4.77
Photography	3.82
Humor & Fun & Happiness	3.20
Shows	2.87
Fitness & Gym	2.51
Modeling	2.34
Cinema & Actors/actresses	1.95

Most of the Instagram influencers produce content related to:

Lifestyle 8.98%

Other popular topics include:

Music 6.6%

Family 4.8%

Beauty 4.7%

Audience performance is a key factor driving social media today. People like to watch the "online diaries" that capture the everyday life, thoughts, and feelings of their favorite influencers. This is why many influencers create lifestyle content that appeals to large audiences.

The least competitive niches are:

Fitness & Gym 2.5%

Modeling 2.3%

Cinema & Actors/Actresses 1.9%



Trending Instagram Topics in 2020: Computers & Gadgets and Shows Showed Explosive Growth

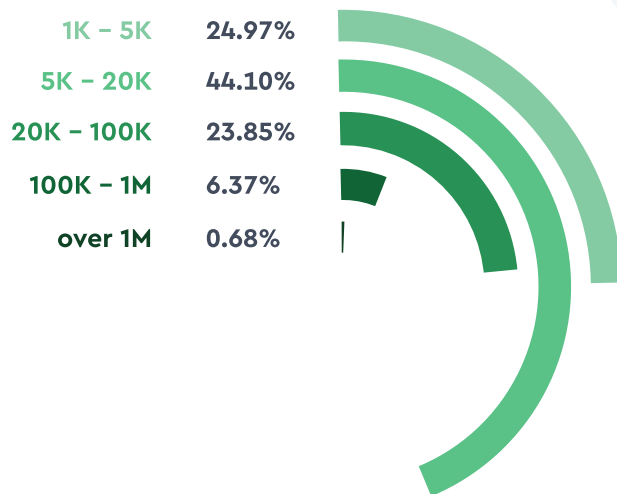
HypeAuditor analyzed Instagram influencers' accounts to see the average yearly growth of followers and the average ER to identify the most trending Instagram categories in 2020.

Category	Average Yearly Growth, %	Explosive growth:	
Computers & Gadgets	105.033	Computers & Gadgets	105%
Shows	102.775	Shows	102%
Family	70.522	Arguably, the Instagram audience consumed more entertainment content in 2020 in order to provide some light relief to events going on across the world.	
Business & Careers	68.454		
DIY & Design	61.167		

Category	Average Annual ER, %	Lead the list in terms of ER:	
Nature & landscapes	5.327	Nature & landscapes	5.3%
Sports with a ball	4.814	Sports with a ball	4.8%
Photography	4.553		
Lifestyle	4.332		
Comics & sketches	4.282		



Almost Half of Instagram Creators in the US Are Micro-Influencers













We broke down Instagram influencers into five main groups (influencer tiers) according to the number of their Instagram followers.

The largest group of creators is Micro-influencers accounting for almost half of all influencers (**44.10%**). This type of creator has between 5,000 and 20,000 subscribers. The second most popular group is Nano-influencers (**24.97%**) with around 1,000–5,000 followers. Mid-tier influencers who have a relatively small audience account for **23.85%**.

Macro-influencers and Mega-influencers & Celebrities represent the smallest groups: **6.3%** and **0.6%** respectively.



Top Growing Instagram Accounts in 2020: Addison Rae Grew Her Account by 1495%

	Account	Instagram Followers	2020 Followers' Growth	Followers' Growth, %	ER (%)
	instagram	382.8M	55.9M	17	0.14
	kyliejenner	207.4M	50.1M	31	4.45
	arianagrande	214.2M	42.9M	25	1.9
	therock	209.8M	41.8M	24	0.4
	kimkardashian	197.6M	40.8M	26	1.57
	selenagomez	201M	35.5M	21	2.42
	charlidamelio	36.2M	32.1M	782	10.95
	justinbieber	156.4M	31.5M	25	1.16
	addisonrae	33.5M	31.4M	1495	9.25
	nike	126.9M	28.4M	28	0.18

With an increase in social media content consumption during the pandemic comes an increase in followers. We looked at the top Instagram accounts, in terms of their follower growth in 2020.



Instagram's own account heads the ranking with the highest number of new followers who subscribed in 2020, the account gained almost 56 million new followers.



Two other accounts with the largest number of new followers belong to Kylie Jenner, media personality and model (50.1M new followers and 31% followers growth) and singer Ariana Grande (42.9M new followers and 25% followers growth).



2020 was good for Addison Rae, a social media personality and dancer, in terms of Instagram growth. She gained almost 31.4 million new followers over the year (1495% followers growth).

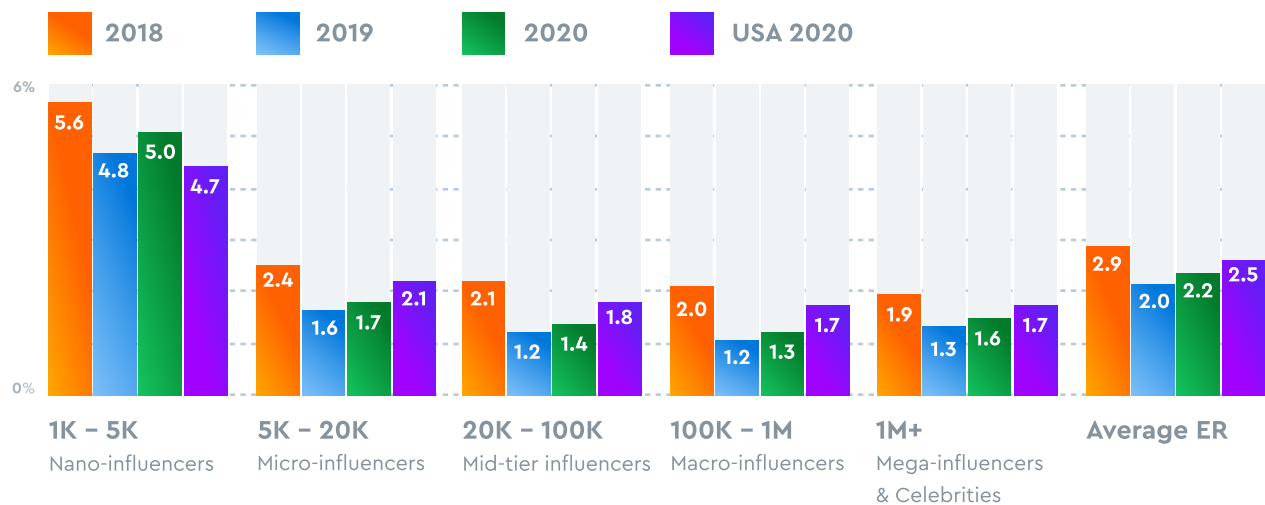


The 16-year old dancer Charli D'Amelio has also thrust into the spotlight, becoming a social media sensation over the last two years. The main driver of Charli's Instagram growth is largely due to her TikTok presence, in which she set a record in becoming the first person to gain over 100 million subscribers. In 2020, Charli grew her Instagram account by 784%.



Nano-influencers Have Stronger Connections with Their Audience Showing the Highest Engagement Rate

Engagement Rate or ER is a commonly used benchmark of success on Instagram as it can determine how well an influencer connects with their audience. Highly engaging content with many likes and comments often stands a better chance of organically appearing on an Instagram feed.



ER on Instagram is calculated as the total number of likes and comments divided by the total number of followers, multiplied by 100%:

$$\text{ER (Engagement Rate)} = \frac{\text{Likes} + \text{Comments}}{\text{Followers}} \times 100\%$$

Nano-influencers tend to have stronger connections with their audience. Thus, their ER is higher than the ER of other influencer groups: **5.6% in 2018, 4.79% in 2019, and 5% in 2020.**

The highest average ER for any influencer tier was achieved in 2018. Since then, the average ER has decreased significantly.

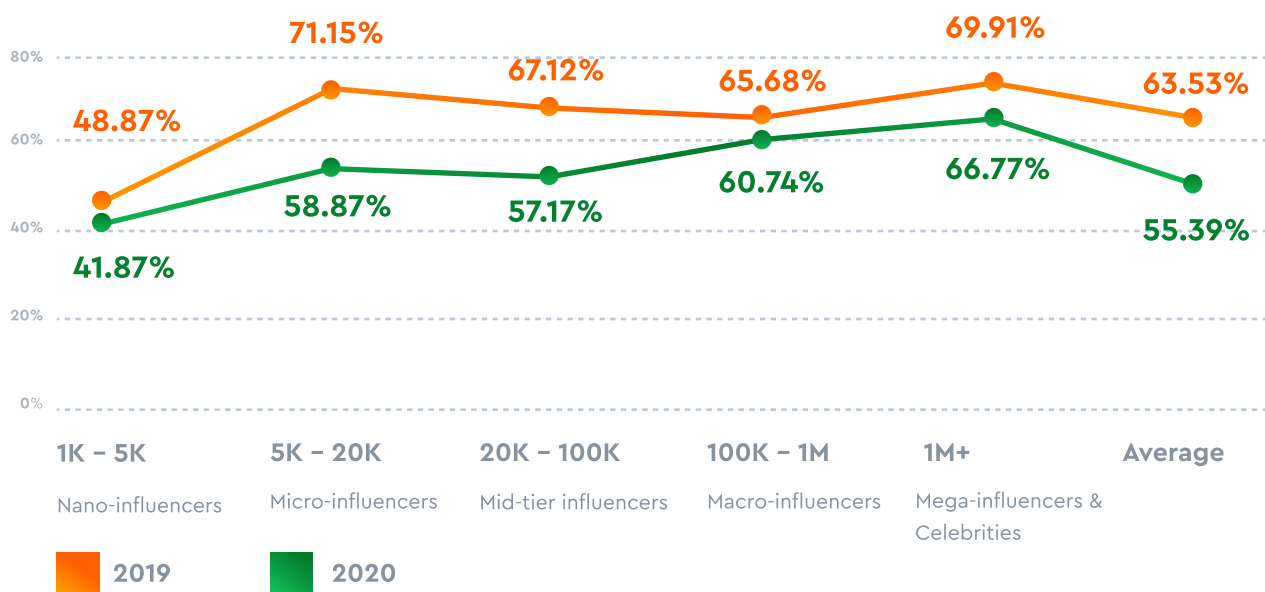
One of the possible reasons for the decline is a new Instagram feature — "hidden likes". Hidden likes were implemented in 2019, hiding public like counts on all photo and video posts in several countries, including the U.S., Canada, Australia, New Zealand, Brazil, Ireland, Italy, and Japan.

2020 showed little growth compared to 2019, which is associated with an increase in time spent on social media due to the COVID-19 restrictions.



The Average Percent of Instagram Accounts Involved in Fraud Decreased by 8.14%

Percentage of influencers involved in fraud by number of followers:



Compared to 2019, the average percent of Instagram accounts involved in fraud decreased by 8.14%.

One of the reasons for the decrease is that Instagram imposed restrictions that banned The Follow / Unfollow trick.

But the number of influencers involved in fraud is still very high (**55.39%**). Fake influencers and engagement could cost advertisers millions of dollars each year.

Among the most popular gray hat tricks are:





















- 🔥 Buying followers
- 🔥 Buying likes and comments
- 🔥 Buying stories views
- 🔥 Comments Pods



According to HypeAuditor's internal research, only 55% of Instagram followers are real people. This means the other 45% consist of bots, inactive accounts and mass followers.



The Most Talked About Brands on Instagram in 2020

		Brand username	Mentions	Influencers	Estimated Reach
1		liketoknow.it	609 895	21 514	5163M
2		instagram	223 821	60 785	2460M
3		zara	165 897	48 023	1346M
4		sheinofficial	136 961	30 881	1808M
5		fashionnova	132 589	27 038	11681M
6		tiktok	129 869	50 509	2461M
7		nike	118 267	42 357	2470M
8		spotify	109 056	46 994	2844M
9		hm	103 508	38 026	940M
10		prettylittlething	94 575	23 543	2559M
11		amazon	73 953	32 836	920M
12		pinterest	72 153	19 346	487M
13		target	69 659	27 136	910M
14		netflix	68 729	38 244	3935M
15		dior	56 181	23 204	1810M
16		revolve	53 469	7 080	2482M
17		gucci	52 573	23 782	1170M
18		anastasiabeverlyhills	52 252	16 365	548M
19		ubereats	50 675	9 245	320M
20		idealofsweden	48 466	16 767	145M

Instagram, with its huge, highly-engaged audiences who consume millions of pictures and videos daily, is a gold nugget for brands and marketers.

The most tagged brand by influencers is **LIKEtoKNOW.it** which provides a social-based shopping service allowing users to purchase items that creators are wearing or using in their Instagram post. There were over half a million mentions of the LIKEtoKNOW.it account made by 21,514 creators in 2020. This comes as no surprise, due to users spending more time browsing on social media platforms during the pandemic.



Instagram's own account takes second place with 223,821 outperforming other social media networks like TikTok with 129,869 mentions (6th place), and Pinterest with 72,153 mentions (12th place).



Of the twenty most mentioned brands, ten are related to clothes, fashion, and beauty: Zara, Shein, Fashion Nova, Nike, H&M, Dior, Revolve, PrettyLittleThing, Gucci, and Anastasia Beverly Hills. Spotify was the most talked about music brand, surpassing Amazon, Target, Netflix, and Ubereats, in terms of mentions.



Instagram Integration Price and Earned Media Value: the Average Min. and Max. for Each Influencer Tier

\$1 —————→ **\$4.87**

you pay for Instagram
Influencers promotion

of Earned Media Value
you will get on Average

Followers	Average Post Price from (\$)	Average Post Price to (\$)	Average EMV from	Average EMV to
1K – 5K	10	41	9	75
5K – 20K	15	85	35	223
20K – 100K	35	296	128	657
100K – 1M	165	1804	1 155	4311
Over 1M	1 118	∞	5 133	∞



EMV or **Earned Media Value** is the accepted advertising industry standard for measuring PR activities and influencer marketing campaigns. HypeAuditor EMV is based on a proprietary methodology and shows what it would have cost to gain the same reach through paid social among an audience with similar demographics.



To calculate the price we take into account several components, including the influencer's country, follower number, and ER, and use a machine learning model trained on market values. The actual price may vary, depending on several factors like production complexity, hours needed to produce, and assistant work.



Knowing the EMV of creators you work with can help you to better understand how efficient your influencer marketing efforts have been. On the chart, you can see the average minimum and the average maximum EMV for each influencer tier.



TikTok Is the Most Prominent Social Media Success Story of 2020 with 689 Million Monthly Active Users

TikTok was one of the most prominent social media success stories of the year. As of October 2020, TikTok has 689 million monthly active users; the average daily time on the platform is estimated at 45 minutes.

The social media network is rapidly gaining new users. In the first quarter of 2020, there were 315 million TikTok installs worldwide, which is the highest amount of downloads an app has ever received in a given quarter.

66.95%

of TikTok users are between the ages of 13 and 24 years old

TikTok is different and unique from the existing social media platforms, giving both brands and influencers fresh opportunities. TikTok began as a dance and music app for teenagers.

However, it has grown significantly, and now many adults, businesses, and brands have a presence on the platform too.



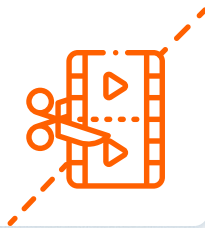


TikTok Updates 2020: Stitch, Voiceover Tool, New 'Well-Being' Feature

The platform is developing new features and functionalities to inspire creativity and help users better engage with content. Here are some major TikTok updates from 2020 brought.

New Stitch Editing Feature

A new editing feature called Stitch allows users to clip and integrate scenes from another user's video. You can cut scenes from other videos and use them as part of your own video, which provides more opportunities to create engaging stories, educational tutorials, recipes, and more.



New Layouts for Duet

Duet, an original TikTok feature, gained four new layouts: left and right layout, react layout, top and bottom layout, and three-screen layout, which opens even more creative opportunities. Creators can find new ways to create and reinvent existing video content across TikTok.



New Voiceover Tool

With the voiceover tool, creators can add their voice to any video they make to engage with their audience in a new way like adding their voice to a song or narrating their story. A voiceover adds a new dimension to content and gives brand-new possibilities for the creation process.

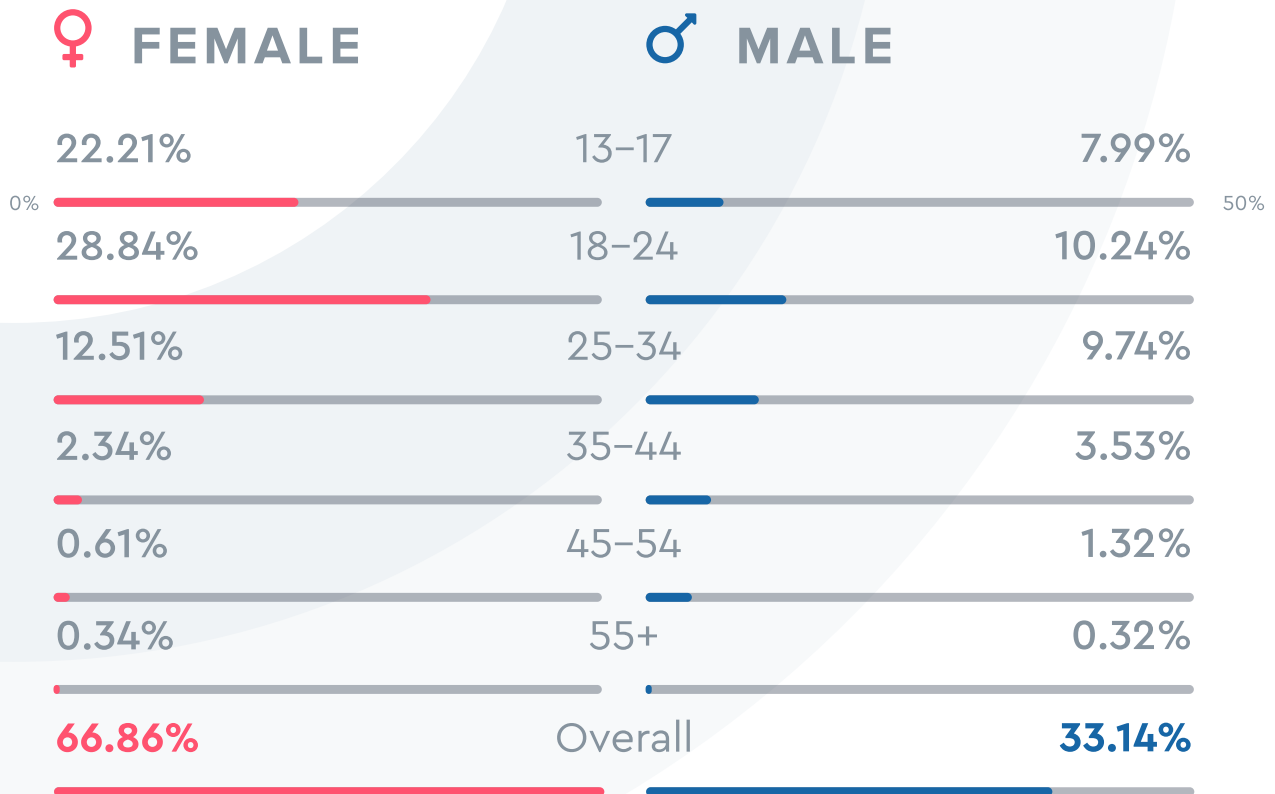


Refreshed Community Guidelines and New 'Well-Being' Features

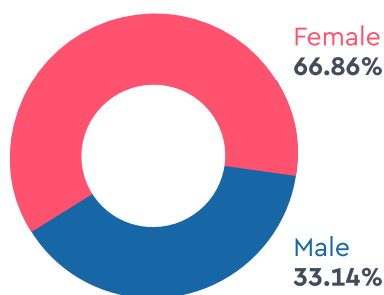
TikTok announced a new set of Community Guidelines with details about what's allowed on the platform. The main goal is to strengthen its existing policies in areas like violence, dangerous acts, and harassment. Along with it, TikTok added four new features focused on the community's well-being as well. By updating its policies the platform aims at providing a positive and meaningful TikTok experience to its users and empowering its community.



More Than Half of TikTok Users in US Are Under the Age of 24



Two-thirds of TikTok users (69%) are under the age of 24 with 39% between 18 and 24, which makes people of this age the largest user group. 29% of users in the 18-24 years old age group are female, while 10% are male.

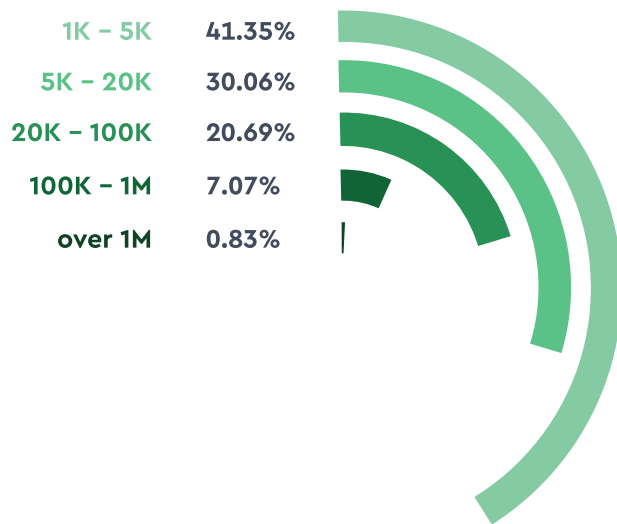


Overall, female TikTok users outnumber male users, accounting for **66.9%** and **43.2%** respectively. But interestingly enough, in the age group between 25 and 34, we see a tilt towards male users: 9% male users versus 12.5% female users who are 25-34 years old.

In terms of age, we see a distinct trail off among older users: 45-54-year-old users account for less than 2%, and users older than 55 account for a mere 0.5%.



41% of TikTok Creators in the US Are Nano-Influencers with 1,000–5,000 Subscribers



The TikTok influencer landscape differs from what we see on Instagram. Over 41% of TikTok creators are **Nano-influencers (41.3%)** who have from 1,000 to 5,000 subscribers.

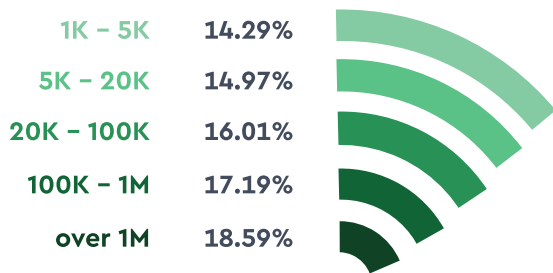
The second and third largest groups are **Micro-influencers (30%)** with 5,000–20,000 followers and **Mid-tier influencers (20.6%)** with 20,000–100,000 followers. There are more than 7% of **Macro-influencers** and **less than 1% of Mega-influencers & Celebrities** on TikTok.



Working with Nano- and Micro-influencers is a good way to build a brand on TikTok, especially for small and medium-sized businesses. These creators have fewer followers, however, they usually have more niche audiences. Their message better appeals to the audience, as people tend to trust them, while some mainstream influencers have been accused of using their influence to make money.



TikTok Celebrity Influencers Have the Highest Engagement Rate



To calculate ER on TikTok, we use a slightly different formula. The total number of likes, comments, and shares is divided by the total number of views, multiplied by 100%

$$\text{ER (Engagement Rate)} = \frac{\text{Likes} + \text{Comments} + \text{Shares}}{\text{Views}} \times 100\%$$

TikTok Celebrity influencers boast the highest ER of **18.6%**. The second highest ER belongs to Macro-influencers who have the ER of **17.2%**.

It's interesting that the ER increases as the number of followers a creator has increases. Overall, TikTok has much higher engagement among all influencer tiers compared with engagement on Instagram.

High ER can be explained by the fact that user behavior on TikTok differs from how people interact with other platforms. TikTok was built for users to easily create and interact with content. This encourages them to post videos, like and follow frequently, and increases engagement.



TikTok Integration Price: the Average Min. and Max. for Each Influencer Tier

Followers	Average Post Price from (\$)	Average Post Price to (\$)	Average Post Views
1K – 5K	4	40	735
5K – 20K	12	70	1948
20K – 100K	29	249	5252
100K – 1M	197	731	37382
Over 1M	1631	∞	557 188

To calculate the price per TikTok integration, we apply several criteria, using machine learning trained on market values:

- 🔥 influencer country,
- 🔥 follower number,
- 🔥 ER,
- 🔥 the overall audience quality.



The actual price may vary, depending on other factors like production complexity, hours needed to produce a piece of content, and assistant work.

Even though many influencers charge brands for their talents, creativity, and audience size, integration prices on TikTok vary a lot, even among creators with the same number of subscribers.



Top Growing TikTok Accounts in 2020: Bella Poarch Grew Her Audience by 5,915%

	Account	TikTok Followers	2020 Followers' Growth	Followers' Growth, %	ER (%)
	charlidamelio	101.6M	78.2M	336	15.78
	addisonre	73.7M	60.4M	455	16.24
	bellapoarch	51.6M	50.7M	5,915	15.67
	justmaiko	43.8M	39.2M	867	17.34
	dixiedamelio	47.9M	38.9M	433	16.95
	jasonderulo	42.1M	34.7M	469	14.98
	spencerx	50.8M	31.9M	170	13.14
	kimberly.loaiza	33.6M	31.4M	1,441	20.34
	willsmith	46.2M	31.3M	212	14.95
	jamescharles	33.2M	25.3M	323	20.37



Similarly to Instagram, the highest growing TikTok user is Charli D'Amelio, a dancer and social media personality, with over 78 million followers on TikTok in 2020.



Of the ten fastest-growing TikTok stars, six post content related to dance, lip-sync, and music videos. Accounts of two celebrities who are well-known beyond TikTok are also gaining traction: Jason Derulo and Will Smith.



The fastest-growing account belongs to Bella Poarch, who grew her audience by as much as 5,915%. As of November 2020, her lip-syncing video was the most-liked video on the platform. The last position on the list is held by make-up artist James Charles.


To see [the full list of the top growing TikTok accounts](#), you can check our blog.







The Most Talked About Brands on TikTok in 2020 in the US


	Account	Brand	Followers	Total mentions	Influencers number
	shein_official	SHEIN	1.2M	9.22k	4.32k
	netflix	Netflix	11.7M	4.79k	3.65k
	barstoolsports	Barstool Sports	12.5M	2.58k	2.18k
	dunkin	Dunkin'	2M	2.61k	1.64k
	ttdeye	TTDeye	312.4k	2.84k	1.53k
	bangenergy	Bang Energy	1.1M	6.78k	1.33k
	fashionnova	FashionNova	2M	7.15k	1.23k
	fortnite	Fortnite Official	3.3M	1.92k	1.16k
	McDonalds	mcdonalds	628.8k	1.26k	1.08k
	Netflix en Español	netflixenespanol	4.6M	1.38k	1.07k

TikTok is gaining more power as an effective platform for promoting your brand. Since consumers have been spending more time on social media in times of COVID-19, creators could provide brands with a quick, easy-to-produce, and effective way to promote their offering.

 The most mentioned account belongs to SHEIN, an online clothes store, with over **9,000** mentions. While 2020 forced brick-and-mortar retail to struggle to keep up due to the pandemic, e-commerce gained an additional boost, as people were shopping online more frequently during the quarantine.

 The top three brands who were mentioned by the largest number of influencers include Netflix (**4.79K** mentions by **3.65K** influencers), streaming entertainment service, and Barstool Sports (**2.58K** mentions by 2.18K creators), a digital media company that produces content mainly focused on sports and pop-culture. During COVID-19, consumption of digital content increased. Since its start, daily online content consumption doubled globally on average from 3 hours 17 minutes to 6 hours 59 minutes.




 Among the most mentioned brands on TikTok are food brands (Dunkin', McDonald's), energy drinks (Bang Energy), online fashion stores (Fashion Nova), an online video game (Fortnite), and, surprisingly, colored contact lenses (TTDeye).

 The Spanish account of Netflix made it to the top 10 of the list with around **1,380** mentions.



56% of Marketers Name YouTube Videos the Most Important Type of Content for Influencer Marketing

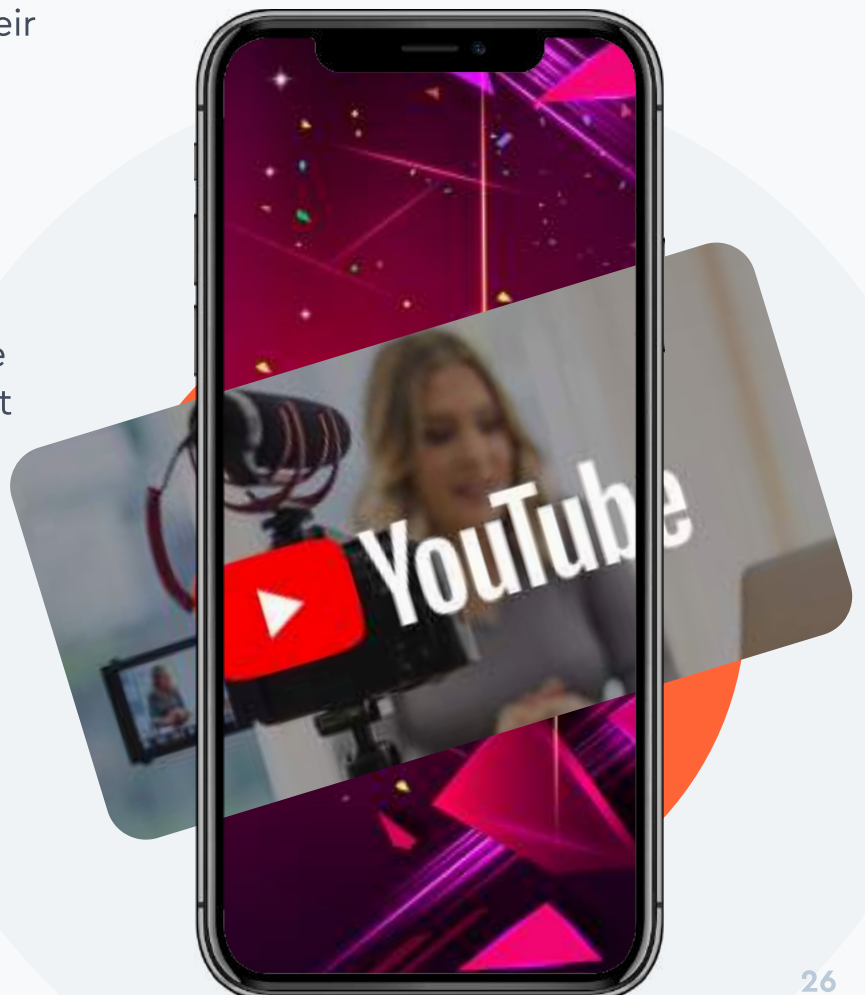
YouTube remains a highly engaging visual medium that boasts a massive viewer count with 2 billion logged-in monthly users. On average, each visitor spends 11 min 24 sec per day on the platform.

Influencer marketing on YouTube can bring impressive results if done right. Working with creators can help brands and businesses reach out to large audiences: 22,000 YouTube influencers have more than 1 million subscribers.

YouTube creators have more time to genuinely connect with their fans and have their message be heard.

56%

of marketers say that YouTube videos are the most important type of content format for influencer marketing.





YouTube Updates 2020: Stitch, Voiceover Tool, New 'Well-Being' Feature

The platform is developing new features and functionalities to inspire creativity and help users better engage with content. Here are some major YouTube updates from 2020.

New Customization Experience in YouTube Studio



YouTube provided creators with the ability to customize the look and feel of their channel by managing its layout and branding. It's the first time the platform gave creators such control over their channels and an opportunity to stand out.

Automatic disclosure of paid product placements



Starting September 2020, any video marked as containing paid promotions (paid product placements, sponsorships, and endorsements) will show users a disclosure saying that the video contains paid promotions.

Watch Now Sticker for Stories



YouTube replaced the "Watch Later" sticker with the "Watch Now" video sticker. This new video sticker links viewers directly to a video whereas the previous sticker prompted them to add it to a Watch Later playlist.

New YouTube Verification Policy



At the beginning of the year, YouTube made a few major changes to the verification process for channels. Previously, if your channel had over 100,000 subscribers, you could get a verification badge. But that's no longer the case. YouTube will now examine each channel that gained 100,000 subscribers and decide whether to grant them its verification badge.

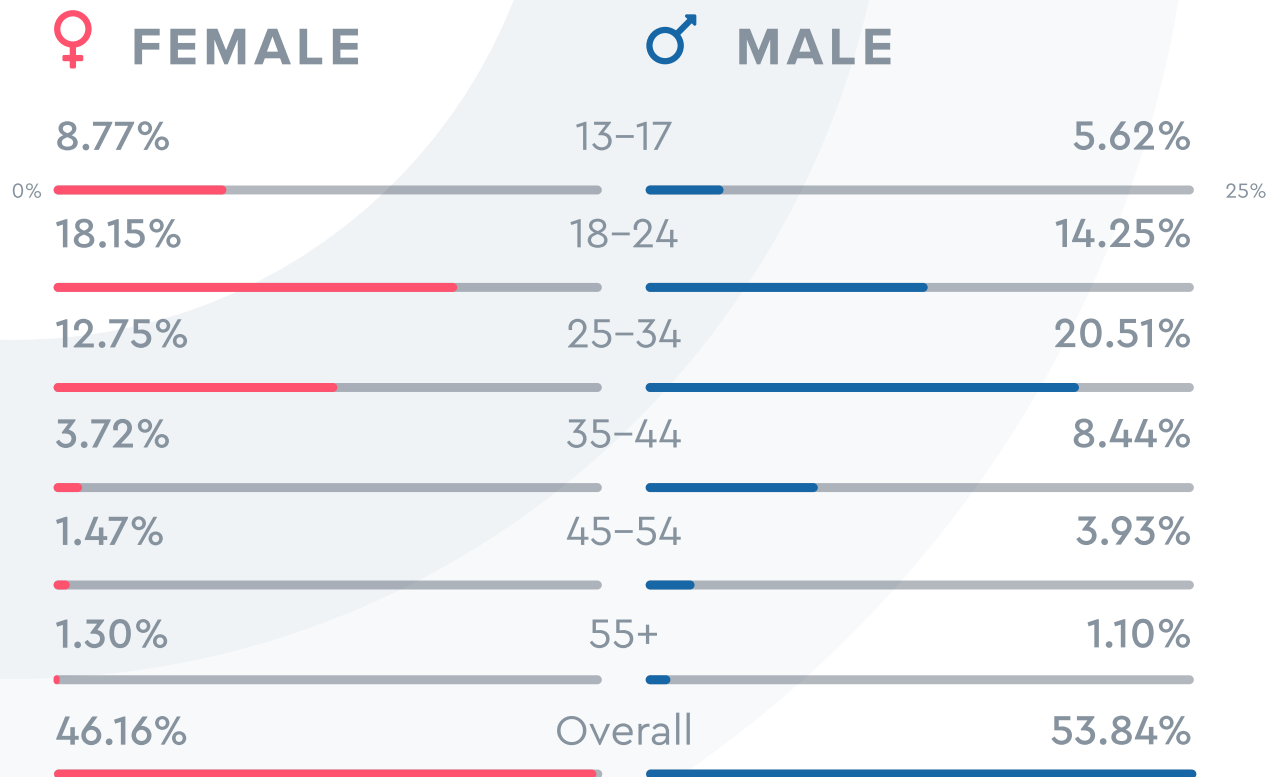
Video Chapters



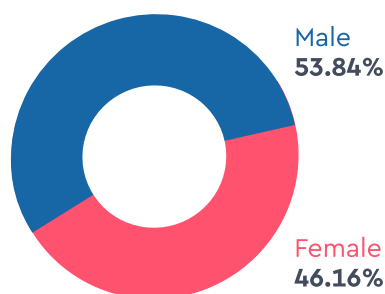
YouTube introduced Video Chapters to help users better navigate longer videos. Creators can add chapter markers breaking down their videos into different chapters so that viewers can easily jump forward to a specific section of the video or rewatch a portion of the video.



66% of YouTube Users in the US Are Aged between 18 and 34



66% of YouTube users are between the ages of 18 and 34 years old. However, the platform doesn't just appeal to grown-up audiences. Teenage users are the third largest group accounting for almost 15% of all YouTube viewers.

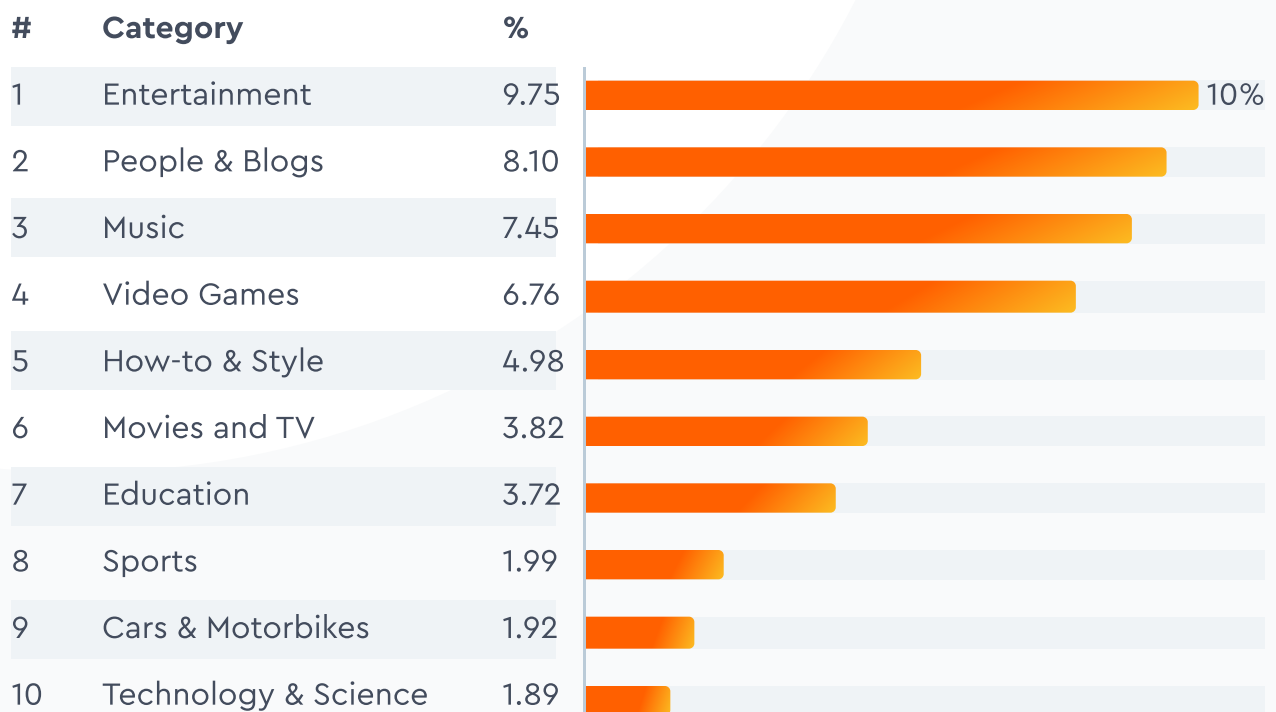


12.16% of all users are between the ages of 35 and 44 years old. Older groups use the platform less than younger audiences. We see declines in numbers as we climb through the age categories: the 45-54 age bracket accounts for 4.6%, while the 55+ user group accounts for only 2%.

In terms of the gender split, male users outnumber female viewers: **53.8%** and **46.2%** respectively. The gender imbalance is most pronounced in the 25-34 age category: 20.51% male users and 12.75% female users. However, if we look at younger viewer groups, we'll see that YouTube is a bit more dominant among female users: 8.77% vs 5.62% in the 13-17 age group and 18.15% versus 14.25% in the 18-24 age bracket.



Distribution of YouTube Influencers by Category in the US in 2020



In terms of content topics, the top three most popular categories are **Entertainment, People and Blogs, and Music**: YouTube creators who post videos related to these topics account for 9.5%, 8.1%, and 7.4% respectively.

Content in the **People and Blogs** category includes lifestyle videos, celebrity talks, website promotion, reviews, and things related to people and blogs. **Entertainment** is another popular category that includes a wide range of topics, such as fun, drama, dance, story, and more.

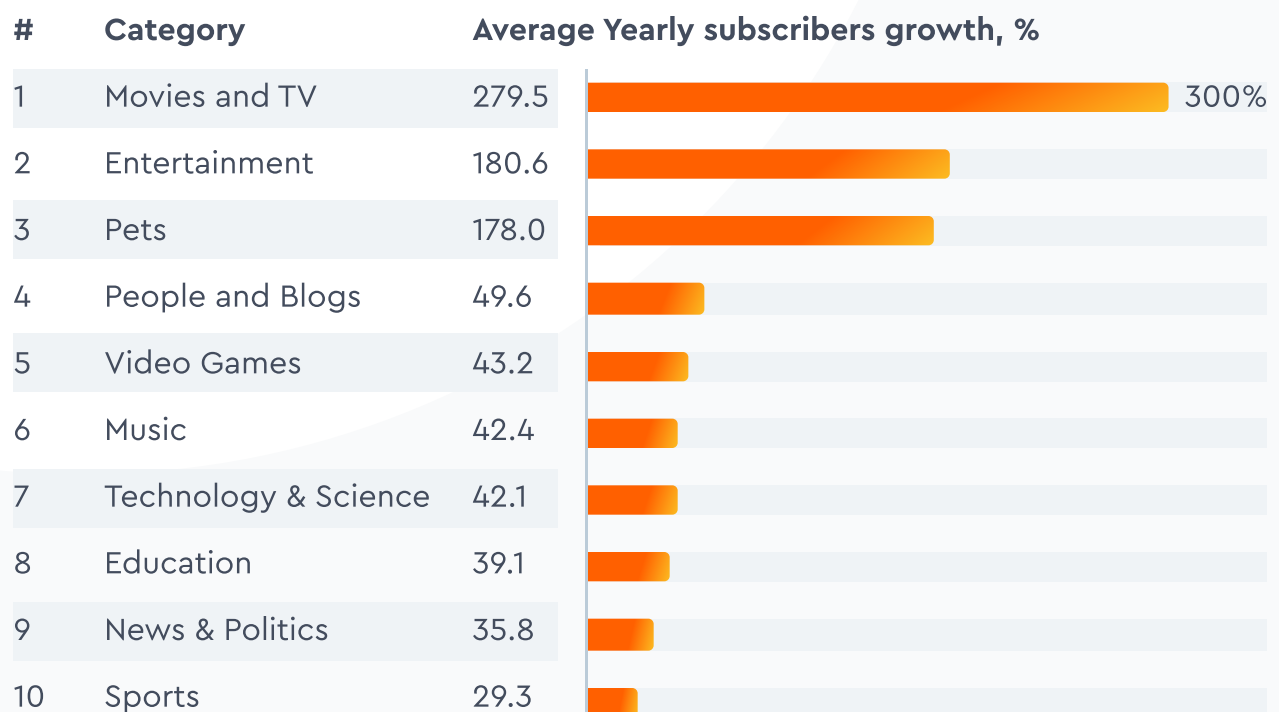
Gaming is continuously increasing and related videos tend to have high monetization potential. 6.7% of creators post content about video games like game reviews, live playing, game hacks, and tips.

Education videos are usually tutorial, knowledge guide, learning, and academic classes, while how-to content (How-to & Style category) focuses on how to perform a specific action or use a certain product.

The least popular categories are **Sports** (1.9%), and **Cars & Motorbikes** (1.9%), and **Technology & Science** (1.8%).



The Most Trending YouTube Categories in 2020: Movies and TV Is in the Lead



A big part of success is understanding the type of content that does well on YouTube and appeals to the viewers. We analyzed YouTube channels in our database and looked at the average yearly growth of their subscribers to identify the most popular types of YouTube videos in 2020.

As we can see, the most trending categories are not necessarily the same as content categories that are popular among YouTube influencers.



The most trending category of 2020 was **Movies and TV** with 280% yearly subscribers growth which includes movie trailers, scenes, full movies, movie making behind the scenes, TV shows, and other related content.



The second and third places belong to **Entertainment** (181%) and **Pets** (178%). There's a lot of video content about pets on the internet, including both real and animated animals. People love seeing cute and funny animals, it is no wonder that this category remains one of the most popular.



Top growing YouTube accounts in 2020 in the US

			2020	
	Account	YouTube Subscribers	Subscribers Growth	Subscribers Growth, %
1	 checkgate	103.4M	31.1M	43.05
2	 Vlad and Niki	61.7M	28.2M	84.24
3	 Kids Diana Show	73.3M	27.8M	61.16
4	 MrBeast6000	52.3M	22.8M	77.34
5	 Like Nastya	68M	21.4M	45.94
6	 WWEFanNation	72.3M	18.1M	33.44
7	 movieclips	48.9M	15.5M	46.79
8	 LooLooKids	38.8M	15.4M	65.56
9	 SmartBooksMedia	42.7M	15M	54.15
10	 DreamTrips	16M	15M	1500%

With an increase in social media content consumption during the pandemic comes an increase in followers. We looked at the top YouTube accounts, in terms of their subscribers growth in 2020.

YouTube creators from various niches and categories can easily dominate the online entertainment industry and grow their channels in a relatively short period of time. In 2020, some channels grew large audiences faster than others. Here are the top 10 fastest growing creators on YouTube of 2020.



Two other accounts with the largest number of new subscribers belong to Cocomelon (checkgate) – educational channel with 3D animation for children, (43% subscribers growth), and Movieclips, a collection of licensed movie clips (46% followers growth).



Among the 10 channels that gained the largest number of subscribers, 4 channels produce children's entertainment content (checkgate, Vlad and Niki, Kids Diana Show, Like Nastya)



How Much Does a YouTube Sponsored Video Cost?

Views	from(\$)	to(\$)
1k-5k	60	793
5k-20k	168	1240
20k-100k	389	1859
100k-1m	1306	4061
1m+	7332	∞

To calculate the price we take into account several components, including:

- 🔥 the average video views
- 🔥 audience location
- 🔥 audience attitude
- 🔥 other factors












The actual price may vary, depending on several factors like production complexity, hours needed to produce, and assistant work.



We see that the more followers influencers have the higher the average price. Obviously, **Mega-influencers earn much more than Nano- and Micro-influencers.** Most social media creators charge brands for their creative vision and the size of their audience. However, the final price is a matter of multiple factors. The cost of influencer marketing varies from creator to creator.



The Most Talked About Brands on YouTube in 2020

		Brand username	YouTube Channels	Mentions	Views
1		shein.com	2K	2.9K	56.13M
2		sephora.com	1.5K	2.2K	27.78M
3		epicgames.com	1.3K	2K	188.34M
4		fashionnova.com	1.2K	1.8K	61.41M
5		ikea.com	1.2K	1.4K	42.73M
6		analuisa.com	1.09K	1.3K	17.44M
7		duvolle.com	1.09K	1.3K	10.8M
8		rayconglobal.com	1K	1.6K	617M
9		teamiblends.com	1K	1.5K	22.75M
10		plarium.com	0.8K	1.1K	230.83M

YouTube attracts all sorts of brands that aim to promote their business to large audiences. Let's take a look at the brands that made the most of YouTube advertising in 2020.



The most mentioned brand of the previous year was **SHEIN**, an online clothes store, with 2,900 mentions and over 56 million views on YouTube.

Sephora, a multinational retailer of personal care and beauty products, takes the second place getting 2,200 brands mentions and over 27 million views.



Epic Games, a video game and software developer, is the third most mentioned brand with 2,200 mentions. However, the videos where Epic Games was mentioned got over 188 million YouTube views, which is more than the videos with mentions of SHEIN and Sephora combined.



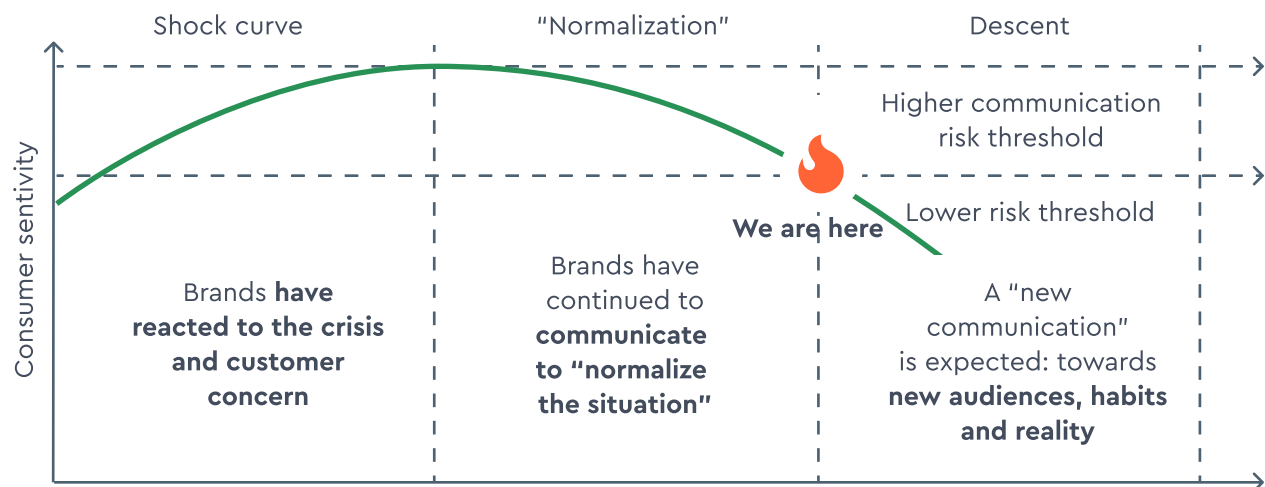
Raycon, a wireless audio brand, was mentioned about 1,600 times, but the videos where the brand was mentioned got the largest number of YouTube views – 617 million.



COVID-19's Lasting Impact on Influencer Marketing

The phases of the COVID crisis

- 1 SHOCK AND ADJUST
- 2 RECONNECT AND ENGAGE
- 3 REVENGE SPENDING
- 4 NEW NORMAL



Influencer marketing has been markedly impacted by the COVID-19 pandemic and, like many other industries, facing a period of unprecedented uncertainty.

Many businesses experienced a significant reduction in demand, thus they have become more modest with their advertisement budgeting.

COVID-19 made its adjustments and slowed down the growth of the industry, but Influencer Marketing didn't suffer as much as other industries.



Mark
Zuckerberg

during
a conference call

"In a time of disaster, people rely more on social services. We are seeing surges in traffic, especially in areas most affected. People want to stay connected while being asked to maintain social distancing and eliminate loneliness."

The use of social networks is also growing, and therefore the amount of advertising money that was redirected from offline to online is also growing.

Brands and advertisers are searching for the most effective ways to share their message to the masses online. As one of the few viable ways advertisers can connect with audiences online influencer marketing will continue to grow.



Important Influencer Marketing Trends to Watch Right Now

1

Brands shift ad spends towards influencer marketing

COVID-19 slowed down the growth of the industry, however, influencer marketing didn't suffer as much as other industries. The number of active social media users is growing. So is the amount of ad budgets that are being redirected from offline, as brands are looking for the most effective ways to share their message with their audiences online. Being one of the few viable ways brands can connect with audiences online, influencer marketing will continue to grow.

2

Performance-based influencer marketing is the future

Many brands used to rely on more predictable and reliable channels seeing influencer marketing as a tool for driving brand awareness. However, today more marketers have a better idea of how their money works and take the guesswork out of their influencer marketing strategy.

We expect influencer marketing budgets to increase significantly as more companies will work focusing on individual performance and ROI of influencers.

3

More brands will be using TikTok as a marketing platform

Brands approach TikTok carefully, due to its young audience, provocative content, and difficulties in choosing the right TikTokers. However, if the app isn't banned in the US, it will definitely continue to gain traction. TikTok shows record growth. We believe it will have 65 million monthly US users in 2021.

4

The popularity of micro-influencers will continue to grow

Small brands have always used Micro-influencers. Big companies have, however, recently turned to micro-influencers too.

In 2020, 46.4% of brand mentions with #ad hashtag were made by Instagram accounts with 1,000–20,000 followers. We expect more businesses to start collaborating with micro-influencers with their share in payment placement growing to 50%, in terms of the number of paid posts.

5

Brands and influencers will be more attentive to content they post

During the pandemic, there were many cases of influencer shaming because of inappropriate content and behavior. The audience has become more sensitive about content they consume. People now take more interest in the influencer's personality, so creators have to carefully filter what they say. Brands, in turn, will approach the influencer selection process more carefully.

6

The importance and relevance of virtual influencers is on the rise

Digital characters are gaining popularity each year, especially in Asia. Their engagement rate remains high. As we analyzed virtual influencers on Instagram, we noticed that they have almost three times the engagement rate of real influencers. The virtual influencers trend continues to grow, as fictional characters play a big role in the discussions of diversity, eco-friendliness, and acceptance of technology.



Methodology



The report uses data from a wide variety of sources, including market research agencies, the internet, social media companies, news media, and our internal analysis.

We have collected and aggregated open data from a variety of sources: social platforms, catalogs, websites, crowdsourcing, and many more. After that, we processed the data by anonymizing, sorting and structuring, cleaning and removing any irregularities, and enriching the data.

Then we transformed the data into intelligent estimations by using best-in-class estimation and machine learning algorithms developed by our team of leading data scientists and influencer marketing experts.



Trending Instagram Categories in the US in Q1 2021

HypeAuditor analyzed Instagram influencers' accounts to see the average Q1 growth of followers and the average ER to identify the most trending Instagram categories in Q1 2021.

Category	Average Yearly Growth, %
Finance & Economics	5.82
DIY & Design	4.48
Architecture & Urban Design	4.40
Business & Careers	4.04
Science	3.88

Finance & Economics and DIY & Design categories have shown the largest average growth. People are looking for advice on how to make the most of their finances and how to save on things by doing them themselves.

Category	Average Annual ER, %
Sports with a ball	5.67
Comics & sketches	5.43
Nature & landscapes	4.25
Winter sports	4.11
Photography	3.87

In terms of Engagement rate leaders are Sports with a ball, Comics & sketches.













Instagram ER in the US Q1 2021

Followers	Average ER, 2020	Average ER, Q1 2021
1K – 5K	4.65	4.65
5K – 20K	2.14	2.16
20K – 100K	1.82	1.81
100K – 1M	1.74	1.75
Over 1M	1.74	1.70
All	2.53	2.49

Engagement Rate in Q1 2021 remained at about the same level as average engagement in 2020.



Top Growing IG accounts in the US Q1 2021

	Account	Instagram Followers	Q1 2021 Followers' Gain	Followers' Growth, %
	selenagomez	218.2M	19.6M	9.9
	kyliejenner	222.7M	17.2M	8.4
	therock	225.3M	17.1M	8.2
	arianagrande	228M	16.7M	7.9
	kimkardashian	211.6M	16.1M	8.2
	vp	17.5M	15.2M	660.9
	nike	140.2M	14.7M	11.7
	potus	18.2M	13.6M	295.7
	jlo	147.7M	12.1M	8.9
	beyonce	170.3M	11.7M	7.4



Interesting not to see Instagram account among the top growing accounts in Q1 2021, because Instagram account led the 2020 top growing accounts list.



First place takes Selena Gomez with 19M new followers and second place goes to Kylie Jenner with 17M new followers.



Curious to see that 6 and 9 places are taken by political accounts: vp – vice president and potus – president of the US.













Instagram created new accounts for Joe Biden and Kamala Harris and probably relocated followers from @kamalaharris and @joebiden to these new accounts.

Also there is a new account for Jill Biden – @flotus.



The Most Talked about Brands IG on Instagram in the US Q1 2021

	Brand username	Mentions	Influencers	Estimated Reach
	fashionnova	17.48K	5.29K	481.86M
	Sephora	7.51K	3.26K	376.97M
	netflix	7.07K	4.84K	366.25M
	ultabeauty	4.31K	1.84K	302.02M
	disneyplus	2.86K	1.72K	298.96M
	nfl	3.92K	1.89K	216.77M
	youtube	12.59K	5.91K	207.99M
	espn	1.94K	1.15K	182.79M
	Spotify	7.24K	5.08K	152.67M
	Prettylittlething	7.66K	3.04K	135.74M

 The most tagged brand by influencers in the US in Q1 2021 was US-based fast fashion retail company Fashion Nova. Over 5 thousand influencers made 17.4K mentions that generated an estimated reach of 481M people.









TikTok ER in the US Q1 2021

Followers	Average ER, 2020	Average ER, Q1 2021
1K – 5K	14.29	13.85
5K – 20K	14.97	14.75
20K – 100K	16.01	15.8
100K – 1M	17.19	17.16
Over 1M	18.59	18.09

We can see a slight decrease in engagement rates for all tiers of accounts in 2021 compared to 2020.



Top Growing TikTok accounts in the US Q1 2021

Account	TikTok Followers	Q1 2021 Followers' Growth	Followers' Growth, %
 billieeilish	17.4M	11.6M	200
 bellapoarch	59.8M	10.7M	21.8
 pudgywoke	12M	6.3M	110.5
 addisonre	78.6M	6.2M	8.6
 7eth	5.9M	5.5M	1375.0
 rampage_thedancer	7.1M	5.5M	343.8
 foodies	20M	5.3M	36.1
 heresyourmonkeycontent	14.3M	5.3M	58.9
 merrickhanna	11.1M	5.0M	82.0
 itsnastynaz	19.8M	4.9M	32.9













First place takes a 19 years old American singer Billie Eilish with 11.6M new followers and second place goes to a 24 years old American-Filipino musical Bella Poarch with 10.7M new followers.





Top Growing YouTube accounts in the US Q1 2021

Account	YouTube Subscribers	Q1 2021 Subscribers Growth	Subscribers Growth, %
 MrBeast6000	55.8M	7.2M	14.8
 checkgate	107M	6.8M	6.8
 Like Nastya	71.9M	5.7M	8.6
 DreamTraps	19.8M	5.1M	34.7
 Kids Diana Show	75.6M	4.5M	6.3
 Super JoJo	16.3M	4.5M	38.1
 Vlad and Niki	64.3M	4.1M	6.8
 A LY TV	4.54M	4.0M	740.7
 MrBeast Gaming	15.6M	3.8M	32.2
 SmartBooksMedia	45.8M	3.4M	8.0













The most grown YouTube account in Q1 2021 is an account of Jimmy Donaldson, better known online as MrBeast. He is an American YouTuber, entrepreneur and philanthropist.



Another his account MrBeast Gaming is also on the list with 3.8M new followers.



The Most Talked about Brands on YouTube in the US Q1 2021

	Brand username	Unique Channels	Mentions	Views
	analuisa.com	679	693	7.53M
	myshopify.com	603	610	33.03M
	shein.com	592	595	16.05M
	fashionnova.com	447	452	12.39M
	nordvpn.com	421	421	112.22M
	duvolle.com	410	411	2.8M
	rumble.com	392	402	7.86M
	ikea.com	388	391	15.39M
	epicgames.com	377	378	32.55M
	microsoft.com	365	365	13.45M



Most mentioned website by YouTube channels brand in Q1 2021 was the website of Ana Luisa **analuisa.com**. Ana Luisa is a jewelry company that is based out of Greenpoint, NYC.

Ana Luisa sends a few jewelry pieces in exchange for an honest review by influencers. This approach yields tangible results: the brand received 693 mentions by 679 channels.



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