



THE SHELF

FULL-FUNNEL INFLUENCER MARKETING

REAL INFLUENCE

The State of
→ Influencer Marketing
After the Events of 2020



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Influencers Have Influence

The pandemic brought with it a slew of changes to which brands and marketers spent much of 2020 adapting. At the onset of the pandemic, a provocative idea emerged: Would COVID-19 bring an abrupt end to the influencer marketing industry?

With supply chains interrupted and consumers staying home, brands slashed marketing budgets and converted their KPIs from brand lift and acquisition to conversions and retention.

Since influencer marketing traditionally has been considered a brand awareness strategy (due in large part to the fact that many marketing teams don't know how to structure other types of influencer campaigns), it made sense that with brands shifting away from awareness campaigns, influencer marketing - and thus influencers - would become a thing of the past.

But that isn't how things unfolded. At all.

In this report, The Shelf Full-Funnel Influencer Marketing Agency highlights the key shifts that happened in the influencer space that were a direct result of the historic events of 2020.



@streetscout

KEY SHIFT #1: RESPONSIVENESS

Influencers were the first to pivot their messaging during the early weeks of COVID-19.

When brands silenced their marketing messages as COVID-19 moved across the world, influencers were the first to successfully pivot their own messaging.

Their success incentivized brands to partner with influencers BECAUSE influencers had a better gauge on audience sentiment than most brands had.

Seems a small thing, but it's actually pretty telling:

The pervasive notion is that influencers are creating content strictly to monetize their audiences - making money without getting "real jobs." But when COVID first started its steamroll over the earth, brands had no way of knowing when things would start getting back to normal and many of them went silent.

Influencers not only shifted the way in which they engaged with their audiences, but they also guided brands into facilitating different types of connections with their audiences.



**Key
Shift #1**
RESPONSIVENESS

Key Shift #2

OWNERSHIP &
LEADERSHIP

KEY SHIFT #2: LEADERSHIP →

Influencers took ownership of their role as bona fide community leaders.

The "normalcy" created by online communities during those first few months was largely the work of influencers who were creating content around topics that would help people ADJUST to life indoors.

Instagram became a safe place for people to share their experiences and their feelings. In 2020, Instagram also outpaced Twitter as the primary social media platform for staying up to date on COVID news.

Influencers used hashtags to help people topically identify productive ways to fight back lockdown-induced cabin fever. These makeshift mental health "hashtag hubs" drew millions to Instagram who would otherwise have been separated from their friends, coworkers, and even families during the lockdown and subsequent social distancing guidelines.

During the summer of 2020, influencers used hashtag hubs to organize a global social movement to spark action in more than 4,000 cities on six continents.

KEY SHIFT#3: ACCOUNTABILITY

Influencers gained leverage by demanding transparency, accountability, and action from brands.

One of the most telling shifts that took place in the influencer space was the call for greater transparency and more accountability from brands.

With the global community under the perpetual threat of a seemingly unstoppable pandemic, thousands of small businesses were shuttered, many permanently. Influencers called on brands and local governments to step in as global citizens and help businesses and families survive the downturn.

Influencers also pushed brands to use the worldwide downtime and social movement as the catalyst for brands to roll out new policies on diversity and inclusion, including:

- hiring more people of color as decision-makers
- Implementing more accurate representation in their marketing efforts
- paying minority influencers and contractors the same competitive rates as white influencers and contractors.

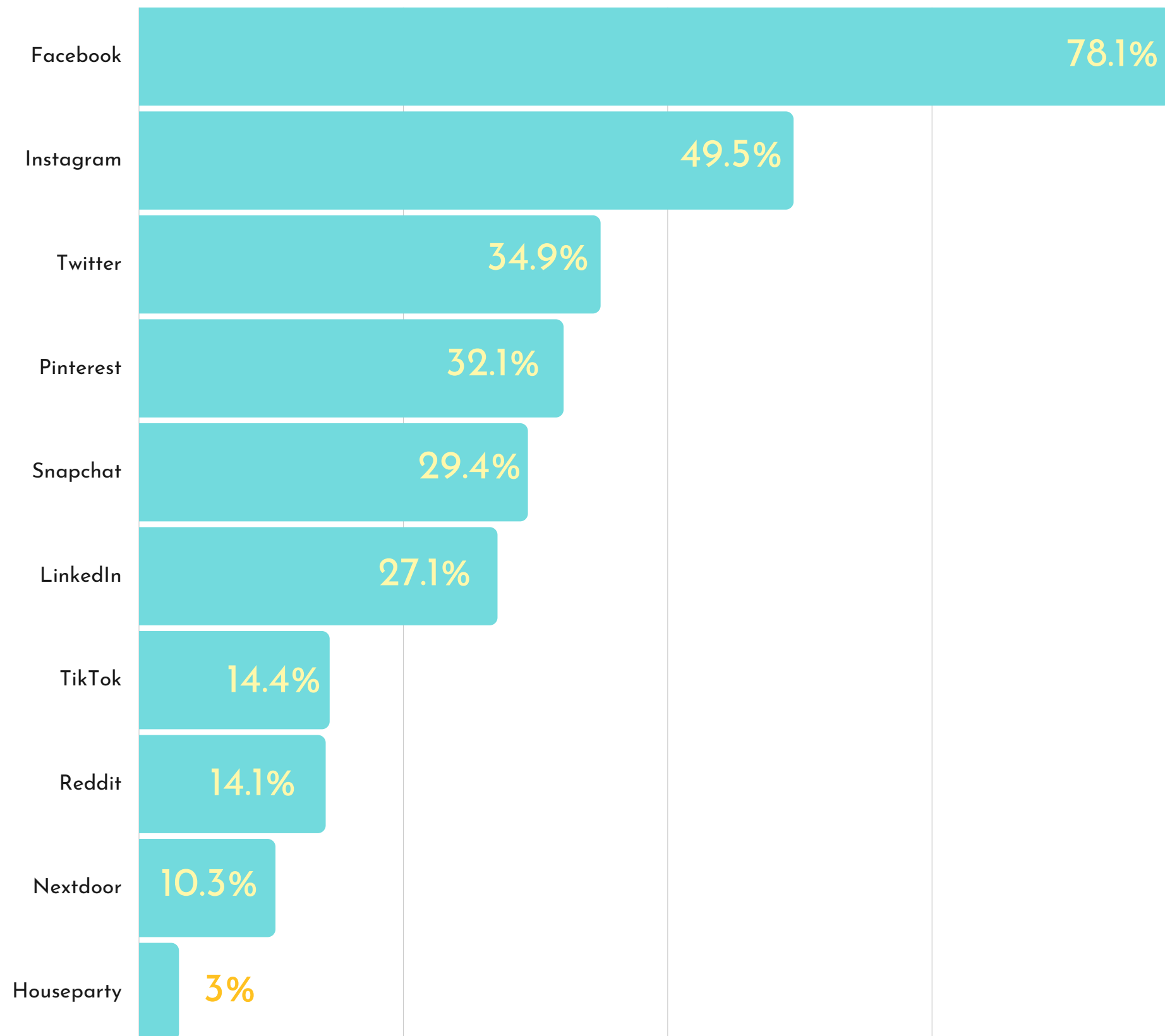
And major brands fell in line with influencer demands.





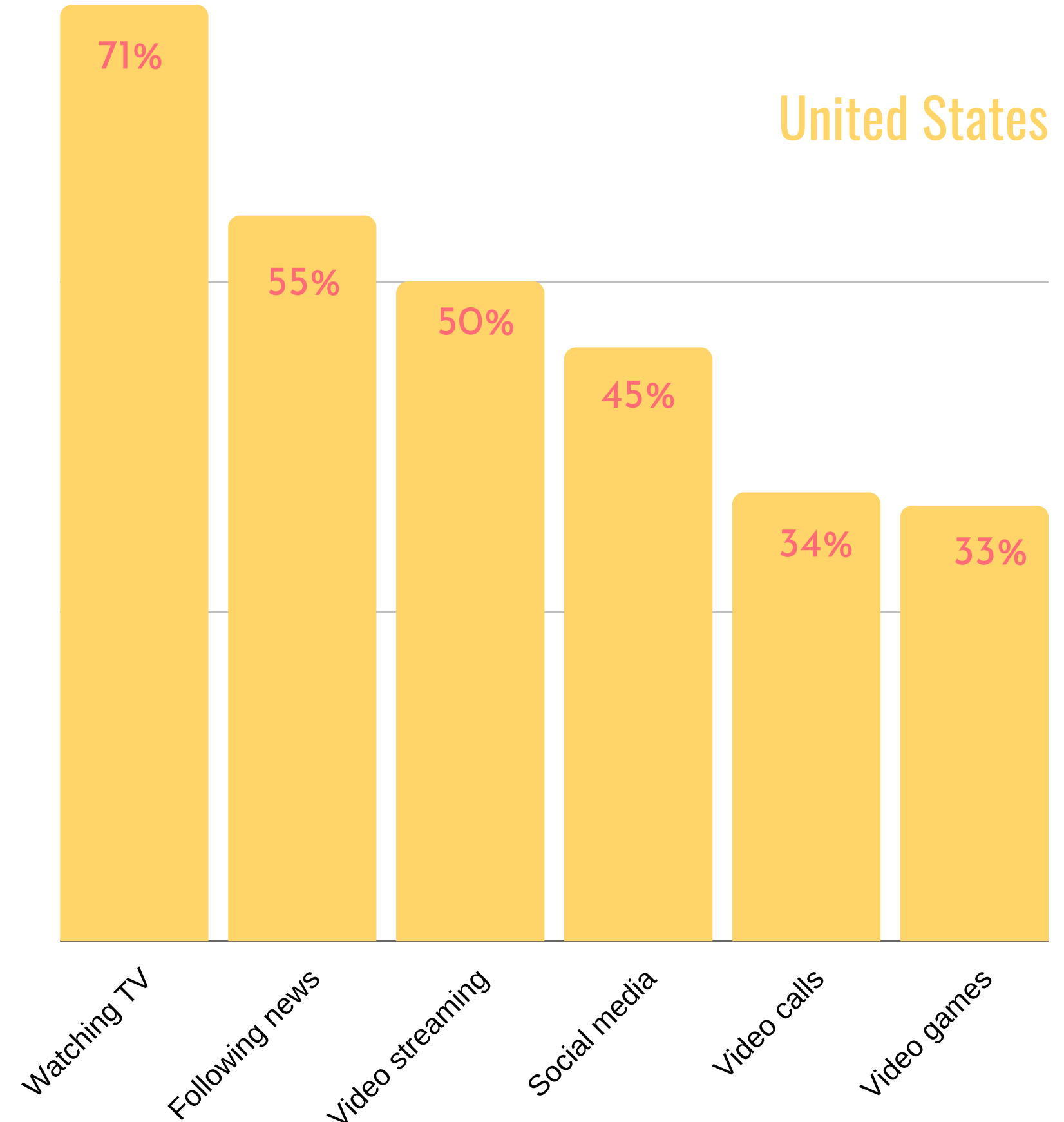
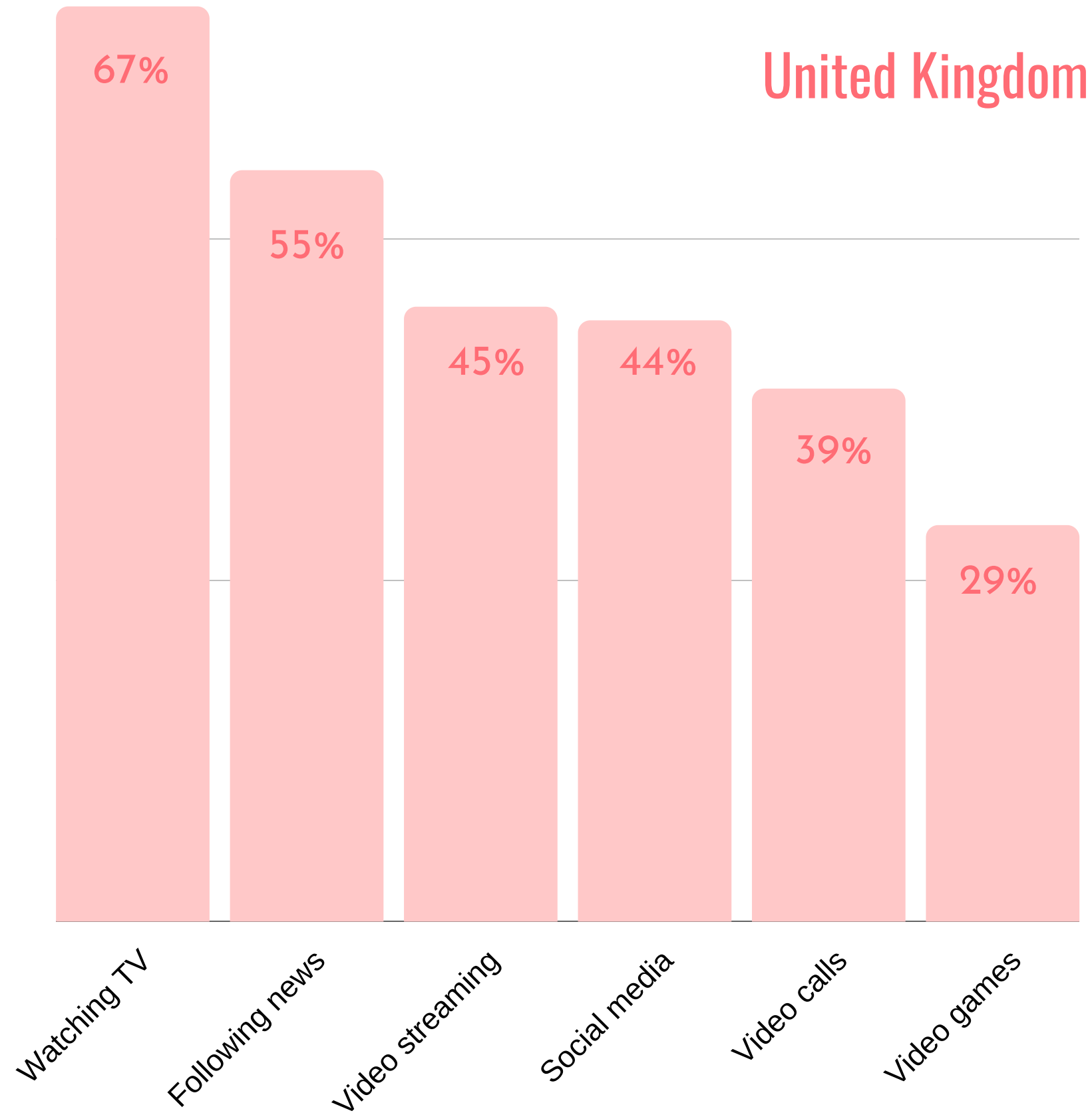
Social media platforms used by U.S. adults during the pandemic, as of March 31, 2020

Source: Statista



Percentage of adults who are doing more since the start of the coronavirus pandemic, as of May 31, 2020

Source: Statista



Podcasts

In July, NPR reported a steep decline in Q2 ratings as a quarter of its radio audience stopped listening after shelter-in-place orders eliminated morning and evening commutes.

During the same period, engagement with NPR content on its site and with its audio app increased by the same percentage.

Podcast consumption reportedly increased by 42% globally from March to April after the initial dip, as listeners from around the world added podcasts to their shelter-in-place routines.

Pandemic Shifts Media Consumption

TikTok, Twitch and podcasts become quarantine staples

TikTok



TikTok broke records, garnering 315 million new downloads in Q1 2020, the most app downloads ever in a single quarter. Between 2019 and 2020, regular TikTok use among Gen Zers jumped from 19% to 35%. In the same period, regular TikTok use among millennials jumped from 3% to 19%, with most of the growth happening during the first few weeks of the pandemic.

Twitch

Twitch viewership in the U.S. more than doubled in Q1 2020. On January 1, 2020, 13.3 million hours of Twitch were watched. Viewership peaked on March 21, 2020, at 43.2 million before dropping to 34 million on March 31, 2020.

Things to discuss

- **#quarantinelife:** Influencers set the tone for global downtime
- **#speakup:** Influencers drive the social media campaigns that drive social action
- **#vote2020:** Influencers encourage political action without pushing an agenda
- **#globalcitizen:** Influencers demand accountability from brands





#quarantinelife

**Influencers pivot
their messaging**



**Influencers keep
people connected**



**Influencers lead
by example**





Influence Beyond #Sponcon

Influencers make the pivot.

While brands scrambled to figure out what to do as COVID-19 hopped from continent to continent, influencers were able to take super-quick audience polls to find out what their followers wanted to see from them.

THIS IS SUPER IMPORTANT because the effectiveness of influencer marketing hinges on:

- an influencer having a relationship with her audience
- the audience having overall positive feelings toward the influencer
- an influencer understanding what kind of content resonates with her audience



Influencers keep people connected.

Whereas social media has notoriously been touted as a source of anxiety for many users, during the pandemic, people flocked to social media looking for ways to feel better.

After the initial pivot in their content strategy, influencers began assuming greater ownership of their communities with regard to the messaging, tone, dissemination of reliable information, and practical tips to help their followers navigate the pandemic safely. As you will see later in this report, that innocuous shift created a fundamental change in how influencers see themselves and how they do business.

58% of social media users noticed more influencer content...

... and more than half of social media users surveyed had positive attitudes toward the influencer content they saw.

INFLUENCING THE CURVE

In April, at the height of the pandemic's spread in the U.S., The Shelf team created @influencingthecurve, an Instagram account aimed at keeping people on top of COVID-related news and sharing reliable information from sources like the WHO and the CDC. We put out a general call for influencers to participate in the campaign by tagging @influencingthecurve and adding #influencingthecurve to their posts as a signal to us that the content being posted could be included as part of our campaign.



92

influencers posted to their feeds using the campaign hashtag between April & May



172

pieces of content were created by influencers in April & May



440+

posts now include #influencingthecurve on Instagram



13

different nations were represented by the influencers who participated



156K

instances of engagement were generated on IG for this campaign



5.1M

different IG accounts were reached by the content in the ITC campaign



Instagram Outpaces Twitter and Becomes the COVID-19 News Source

Within the first few weeks of the coronavirus disease traveling the globe, Instagram became a go-to hub for users to get updates and information about the things happening in their local communities and about the way in which COVID-19 was impacting communities around the world.

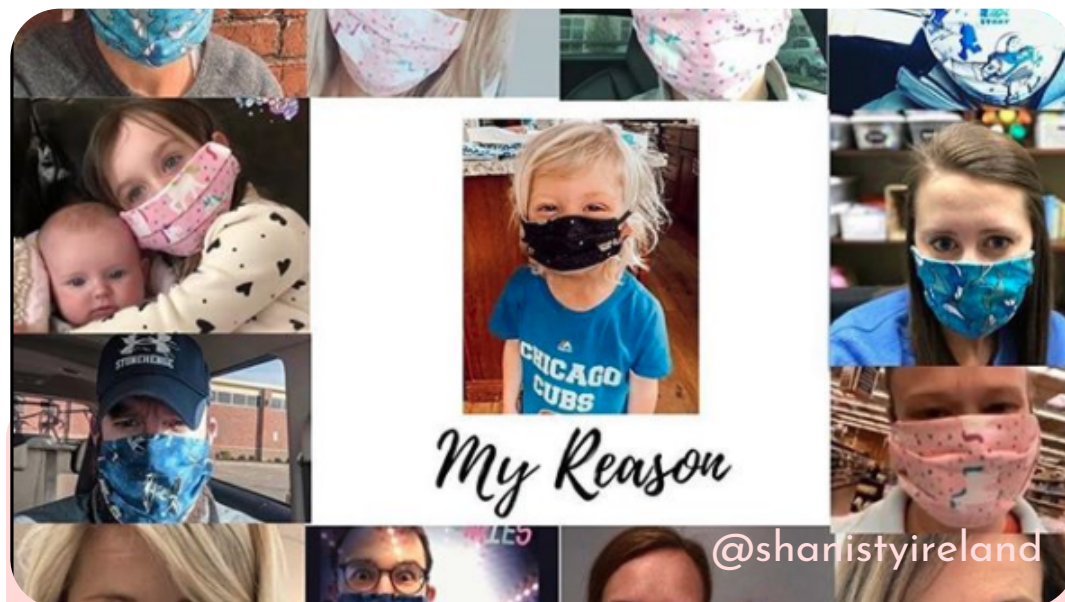
By April 1st, there had been more than 2.9 billion interactions on influencer posts surrounding the coronavirus.

Influencers once again used their influence to get people to take action, but this time, it was *not* on behalf of a brand. Influencers served as tent poles to keep their audiences informed, engaged, entertained, and supported as the world watched the unthinkable unfold.

Influencers Build "Hashtag Hubs" to Help People Navigate #Quarantinelife



Influencers Lead by Example



HASHTAG HUBS TO ENCOURAGE SOCIAL RESPONSIBILITY

#wearamask 1.2M posts
#stayhomestaysafe 3.6M
#shelterinplace 650K
#stayinghome 640K
#washyourhands 1.7M
#donttouchyourface 59.8K



HASHTAG HUBS TO KEEP PEOPLE ENGAGED AND INFORMED

#covid 11.5M
#covid19 34M
#covid19news 80K
#covidmemes 203K
#quarantinememes 503K
#quarantinelife 11M



HASHTAG HUBS TO GET PEOPLE TRYING, DOING, & SHARING

#quarantineprojects 91K
#quarantinechallenge 135K
#quarantinehaircut 64K
#quarantinecooking 708K
#quarantineworkout 374K
#quarantineart 555K



#speakup

Influencers start the hard conversations →

Influencers power social movements →

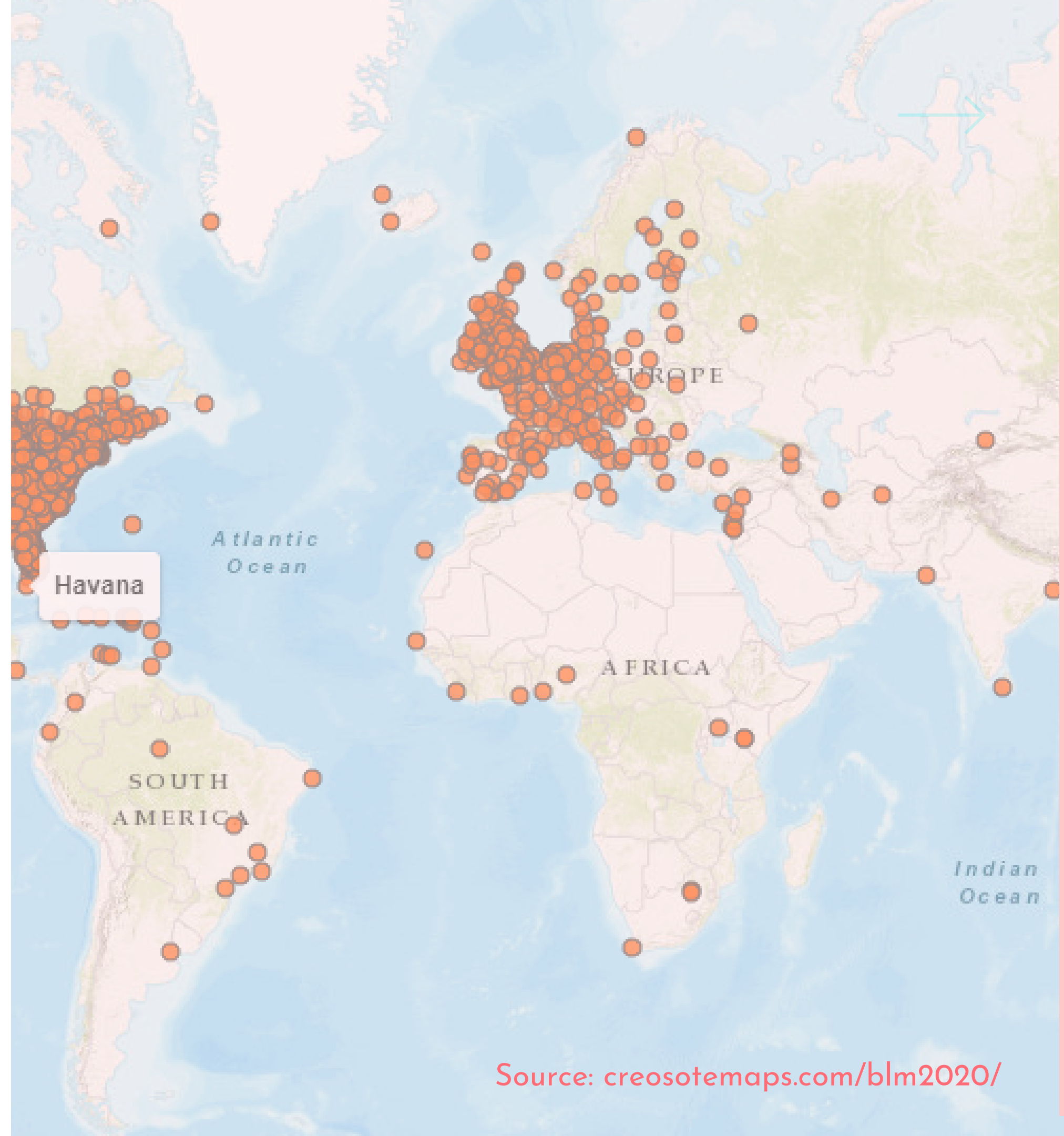
Influencers hold brands accountable →

Building Momentum in Social Movements

Black Lives Matter

The summer of 2020 was replete with change. On the heels of what we hoped would be the peak of the coronavirus in the U.S., the filmed death of George Floyd at the hands of Minnesota police sparked a months-long series of human rights protests in the state. But they didn't just stay in Minnesota.

Powered by social media, the Black Lives Matter movement ignited protests throughout hundreds of U.S. cities and simultaneously into other countries, including France, England, Canada, Brazil, Mexico, Colombia, Nigeria, Kenya, South Africa, Zimbabwe, Turkey, Spain, Russia, Guam, China, Japan, Iceland, Australia, New Zealand, and dozens of other countries.



Source: creosotemaps.com/blm2020/



Black Lives Matter

#BlackLivesMatter

Black Lives Matter is a decentralized social/political movement created in response to the acquittal of George Zimmerman for the 2012 killing of Black, unarmed teen Trayvon Martin in 2012. BLM exists to bring awareness to racial injustices in real time, using social media as the organization's engine.



Blackout Tuesday June 2nd

#TheShowMustPause #BlackoutTuesday

Blackout Tuesday originally began as a day of reflection and accountability for the music industry on the heels of the killing of George Floyd. Music industry insiders used the hashtag **#TheShowMustPause** to signify America was once again faced with a moment in need of reconciliation. But when the industry's mainstream social media influencers like Rihanna and Yoko Ono co-opted the campaign with the new hashtag **#BlackoutTuesday**, it went beyond being a day of industry reflection to being a global day of reflection. The entire campaign and its offshoot happened within 48 hours via social media.



**LUVVIE
AJAYI JONES**



**SOPHIA
BUSH**



**JOVIAN
ZAYNE**



**MANDY
MOORE**



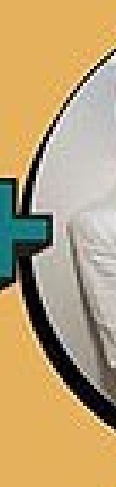
**JUSTINA
OMOKHUA**



**BRIE
LARSON**



**BOZOMA
SAINT JOHN**



**JULEE
WILSON**



**STACEY
BENDET**



**KEAH
BROWN**



**NINA
TAME**



**KAHLANA
BARFIELD BROWN**



**JULIA
ROBERTS**



**LATHAM
THOMAS**



**GWYNETH
PALTROW**

© Instagram

Share the Mic Now June 10th

#ShareTheMicNow

Another large-scale movement that used social media for swift activation was #ShareTheMicNow, a social media campaign that allowed Black female activists, thought leaders, and content creators to take over the Instagram accounts of white female celebrities to give influential Black women a larger platform on which to speak to the issues concerning women and people of color.



Pride Month

#Pride2020

Pride Month commemorates the Stonewall Riots of Greenwich Village NYC in June 1969, the first highly-publicized conflict between the LGBTQ+ community and law enforcement. The Stonewall Riots laid the foundation for the infusion of the pride theme into the Gay Rights movement. In 2020, many members of the LGBTQ+ community joined BLM protests in support of human rights for all people.

Between May 25 and June 10th

In the days after George Floyd's death, influencers once again pivoted their messaging to provide platforms for the social media community to have real conversations around racial and gender equality, systematic injustice, police brutality, and civil rights.

23M

IG posts use the hashtag #blackouttuesday

993

brands (with 10K+ followers) joined #blackouttuesday protests on Instagram

4400+

cities around the world hosted BLM protests

7267%

growth in brand use of #BlackLivesMatter on Instagram from Jan - Jun

559.5K


posts have used the hashtag #theshowmustbepaused

\$90M

in bail funds were donated to ensure protesters got out of jail quickly

3X

increase in LGBTQ+ content on Instagram during Pride Month vs. the previous month

A woman with dark hair is smiling and holding a small, round button with the year '2020' and a red, white, and blue star pattern. The background is a soft-focus outdoor setting.

#vote2020

Influencers' sense of civic duty shifts →

Influencers take a firm personal stance →

Influencers gently nudge voters to act →



INFLUENCERS X POLITICS


On the heels of Mike Bloomberg's offbeat use of creators to make memes for his campaign during his bid for the Democratic nomination, we became sort of obsessed with the idea of influencers and politicians working together. Should influencers create sponsored content for political campaigns? We decided to talk to influencers about it.

In the days and weeks leading up to Super Tuesday, The Shelf team put out a call for influencers to participate in an anonymous survey on the role of influencers in political campaigns. We analyzed the answers of more than 300 influencers who completed the poll.

We followed it up with a second anonymous poll six months later, to see what impact, if any, the events of 2020 had on influencers' responses.

Based on the results of both surveys, the summer of 2020 had a noticeable impact on the way in which influencers perceived their own civic duties.

Should influencers and politics ever mix?

 **40%** More influencers answered NO to this question in the second survey

Question: Do you think it's a good idea for presidential candidates to use influencers to spread their message?

97% of the influencers who participated in our anonymous survey considered themselves to be somewhat informed or very informed about politics, and 99% are currently registered voters.

In our first survey, 65% of the influencers who responded said they think it's a good idea for presidential candidates to use influencers to spread their message. But in the second poll, that percentage dropped to 51% of influencers saying yes. That means the percentage of influencers who now think it's not a good idea for presidential candidates to partner with influencers has increased by 40%.



Would you create #sponcon for a political campaign?



YES

If your political candidate approached you for sponsored posts would you do it?

In both surveys, the majority of participants said they would be willing to create sponsored content for a political campaign. There was a drop between the two surveys, however. In February, 63% said they would do it, versus 48% who would do it now.

NO

Have you been approached by any political campaigns to create sponsored content?

By and large, influencers have not been approached by political parties. Only about 16% of influencers who participated in the survey had been approached by a political campaign by September to create either a paid or organic content in support of a candidate.

NO

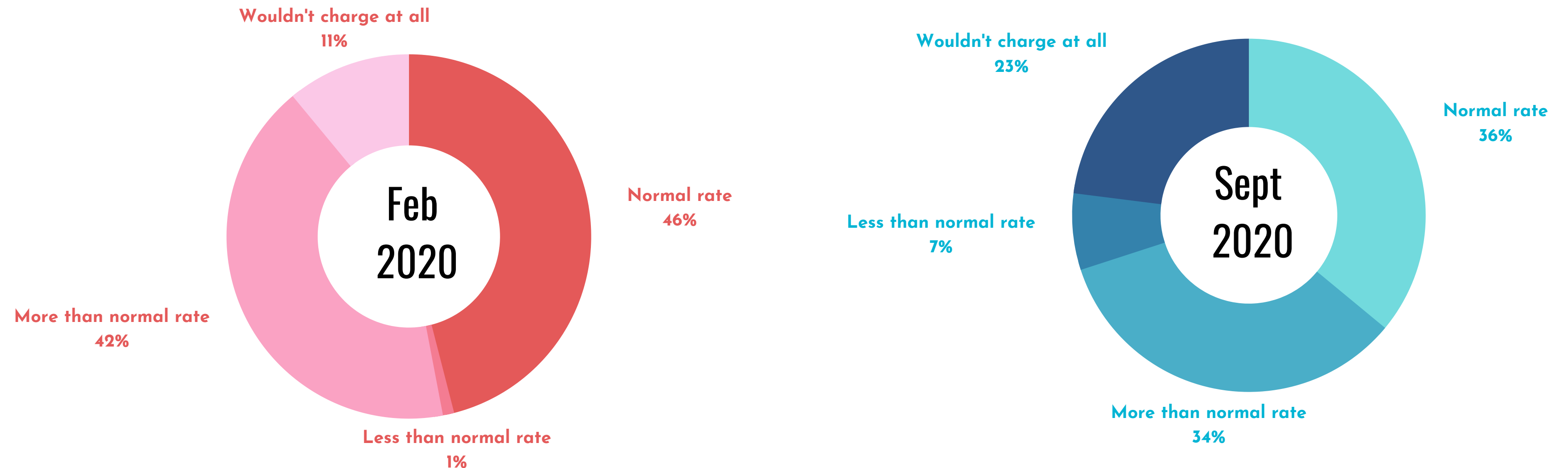
Would you endorse candidates from another party if you were paid to do so?

This was a no-brainer for most influencers as 98% said they would not endorse a candidate from another party when we asked in February, and 99% said they would not do it in September.

How much would you charge a political campaign for sponsored content?

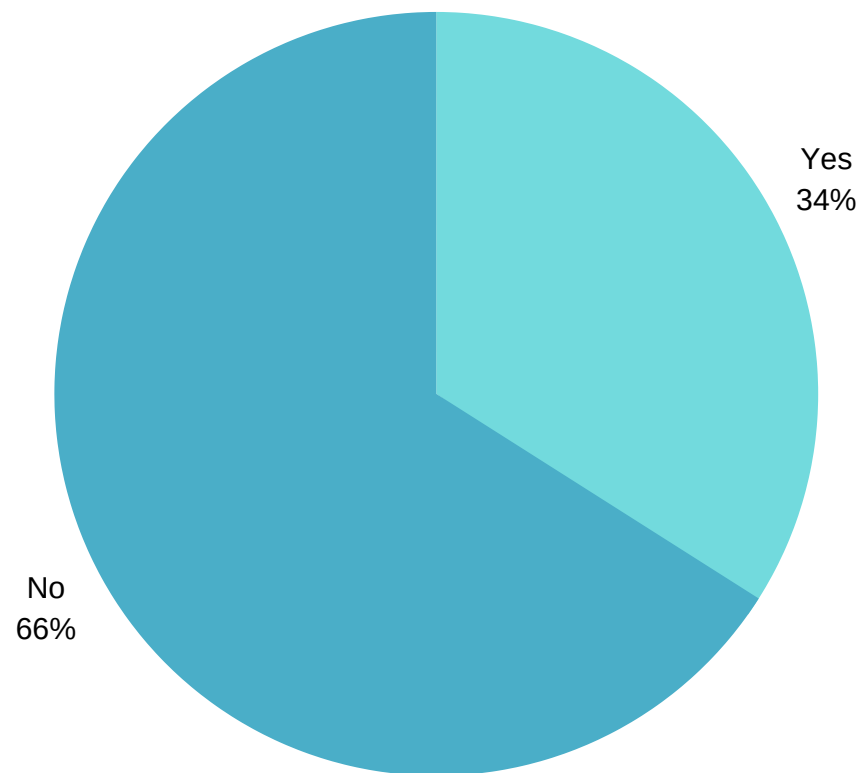
Which fee structure are you most likely to use to partner with your preferred political candidate?

From February to September, the percentage of influencers who would lower or waive their fees to create content endorsing their favorite political candidate more than doubled, from 12% to 30%. This could mean a missed opportunity for political candidates who focused strictly on celebrity influencers to reach the masses.

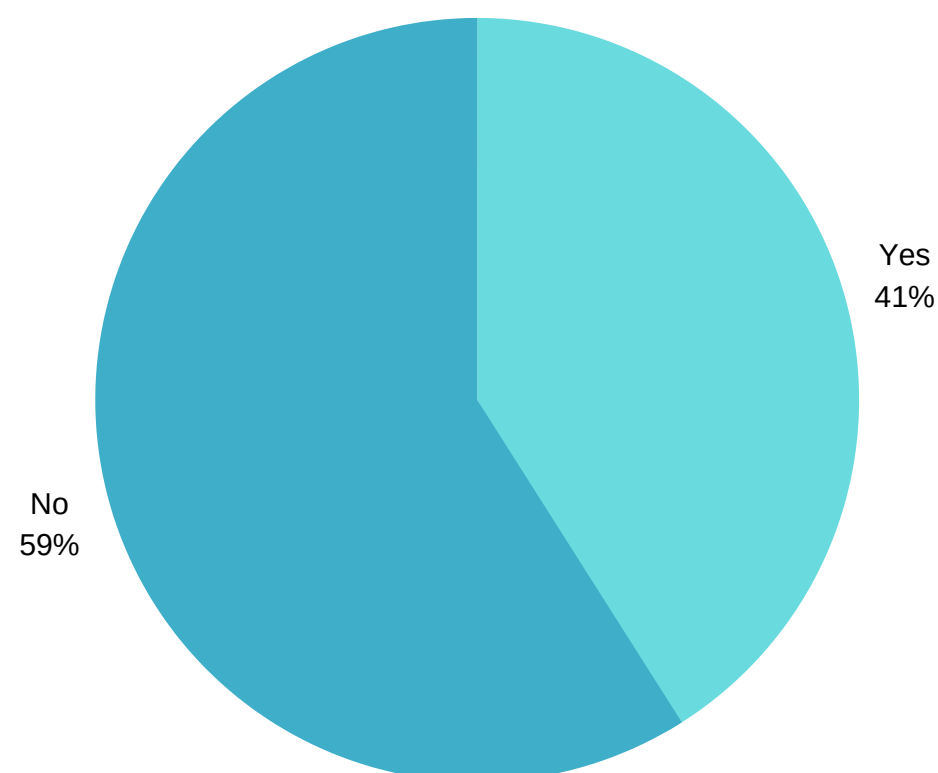


Do you currently declare your political preferences on your social media account?

This is another question where there was a noticeable jump in the answers between the first and second surveys.



Feb 2020



Sept 2020

If you posted a political post supporting one of the candidates, do you think your audience would react positively?

38% of influencers who completed the first survey were unsure how their audience would react to the influencer posting politically-focused content. By September, that percentage had jumped to 47%. It's interesting to note that while more influencers are taking a political stance on their social media accounts, they are not basing that decision on audience sentiment. Which leads us to the next question...

If you knew brands avoided working with influencers who tie themselves to particular candidates, would this dissuade you from publicly endorsing political candidates?

Six months after the original survey, more influencers indicated they would publicly support their favorite candidate in spite of what brands thought of it. In February, 52% of influencers said the blowback from brands could silence them, whereas in September, that percentage had dropped to 41%. This shift likely points to influencers' growing sense of personal responsibility to start the hard conversations and speak up when and where they can.



#ad

Influencer Marketing Could Prove to Be a Powerful Tool in 2024



Slow adoption may have hurt both parties

One of the things we noted in our Election 2020 series published earlier this year was that the Biden campaign was doing very little to win young voters. When we analyzed the social media activities of Michael Bloomberg, Elizabeth Warren, Joe Biden, and Bernie Sanders heading into Super Tuesday, Biden ranked dead last in social media activity, posting just 73 pieces of content to Instagram in the month leading up to Super Tuesday (compared to 274 by Elizabeth Warren and 163 by Bernie Sanders).

While Bloomberg was criticized for the somewhat off-putting way in which his campaign incorporated memes, on both sides of the aisle, being slow to partner with influencers proved to be a costly mistake, particularly in swing states like Ohio, Wisconsin, and Michigan and in those battleground states where President Trump struggled to recapture the support he had in 2016.

Hashtag Strategies

2020 brought with it a handful of powerful endorsements and shows of support that came in the form of a simple hashtag, and we've seen how quickly these mini-campaigns can reach the masses. A series of branded hashtags that target specific public concerns could go a long way toward helping candidates seem more in touch with their voters.

Grassroots Marketing

Both parties focused on bringing in celebrities like John Legend and Hershel Walker (and probably Ted Nugent, because obviously) instead of seeking out micro- and macro-influencers who could have served as that boots-on-the-ground, grassroots team during the pandemic when neither campaign could do much in the way of neighborhood canvassing.



#globalcitizen

Influencers hold brands accountable →

Influencers demand brands enact change →

Influencers call out brands slow to act →

Something of a Reckoning

Consumers start holding brands to a higher standard

Influencers used their social media platforms and their clout to hold brands accountable for everything from supporting community health initiatives at the height of COVID-19 to making a commitment to pay Black influencers what they pay white influencers for creating sponsored content. But this wasn't necessarily a bad thing.

As the disease spread and brands shut down their planned marketing, 1 in 3 brands worried they wouldn't nail the messaging for any COVID-focused campaigns. When brands began partnering with influencers to create content during the first wave of the pandemic, most of them (63%) did so to ensure campaign messaging and visuals would resonate with audiences.

Social media is a powerful tool for social activism, serving as the perfect vehicle for influencers and organizers to thoroughly educate people about the issues, quickly disseminate information and news in real-time, and continually motivate people to act.



At the height of the pandemic...

Consumers expected brands to give back to the communities that had served them so well for so long.

75%

of Gen Zs and Millennials have been affected by COVID-19.



89%

of Gen Z and Millennials expected brands to take action to help with Coronavirus.

84%

of them agree with the statement, "Brands have just as much responsibility as everyone else in helping to stop the spread of the Coronavirus."

78%

of shoppers wanted the brands they chose to take care of employees' health.

62%

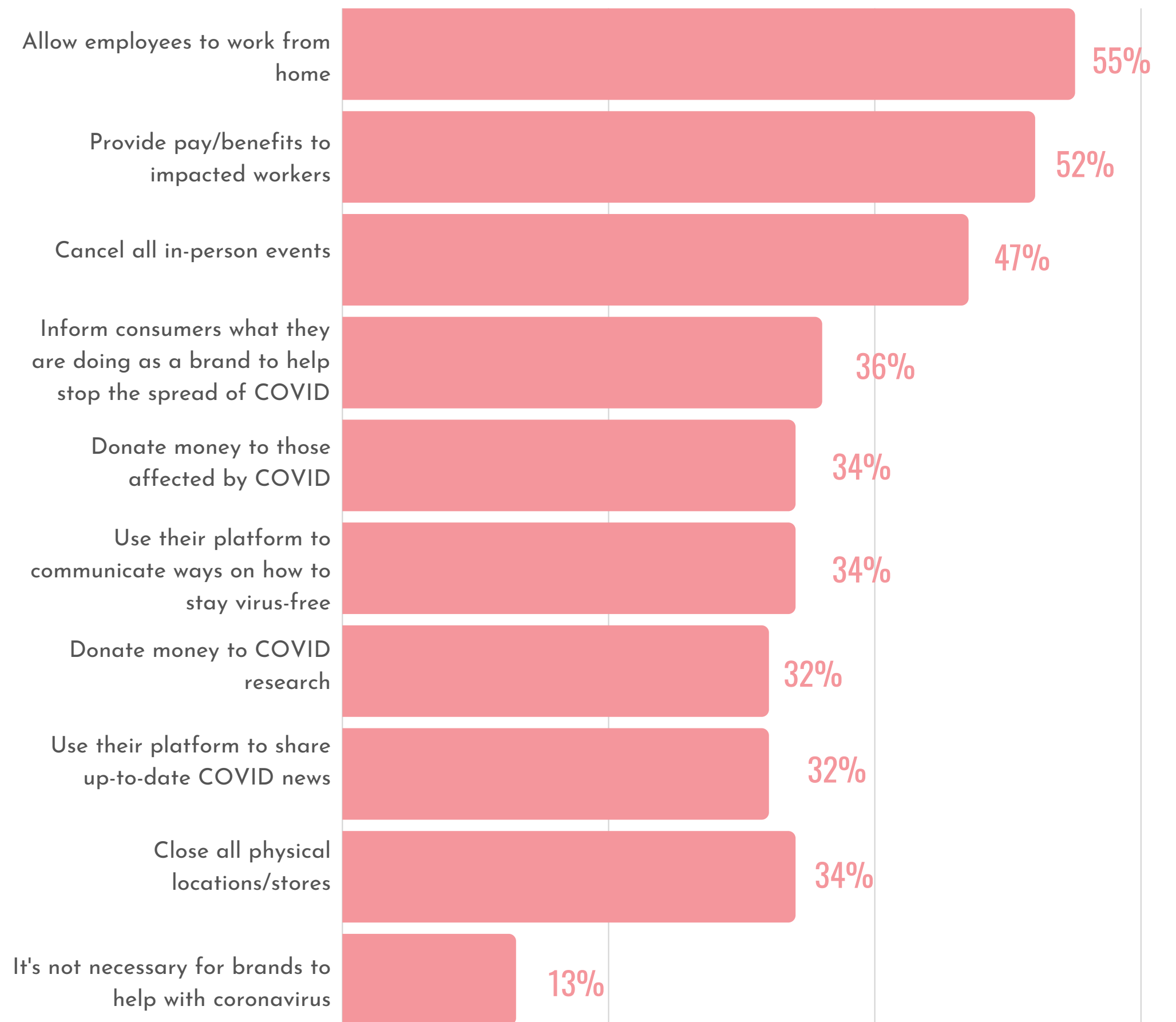
of shoppers wanted the companies to implement flexible working.

What actions should brands take to help with Coronavirus?

Among Millennials 19 to 37 years old

This year, brands were faced with what we are all hoping is a once-in-a-lifetime situation for modern companies - running a business during a global pandemic.

During the first few weeks of the pandemic, many brands paused their marketing and their messaging as they planned their next moves. Many brands relied on cues from social media influencers and survey data collected about consumers to plan their next steps.



Hashtag-Powered Micro-Movements

Micro-movements around actionable hashtags such as #speakup, #keepitlocal, and #dowhatsright have become mantras to influencers who are pushing larger brands to do more to give back.

In the month of July, more than 1,000 advertisers (including Unilever, Walmart, Coca-Cola, and Honda) reduced or stopped their ad spend with Facebook in response to the **#StopHateforProfit** Instagram campaign organized by civil rights groups. The mission of the campaign was to push Facebook to do more to address hate speech on the platform.

Most brands picked up their advertising in August, but Unilever did not, and instead publicly announced it would measure its ad spend against the goals outlined in the company's Responsibility Framework.

These hashtag-powered micro-movements - as small as they sometimes seem - are effecting change in how and with whom younger consumers spend their money, and we've seen that they can even compel action among brands.

Sources: NBC News, The New York Times

#dowhatsright 64K

#keepitlocal 625K

#goodtrouble 137K

#speakup 1M

#antiracist 171K

#takeaknee for justice

#racismisavirus 23K

#dismantlewhitesupremacy 51K

#icantbreathe 1.2M

#globalcitizen 608K

#influencerpaygap 1K

#stophateforprofit 15K

#amplifyblackvoices 88K

THE POWER OF A MICRO-MOVEMENT

Hashtags are an easy way to locate and organize people within a "pop-up" community on Instagram, Twitter, and TikTok.

For younger social media users, hashtags are the unifying element that ties them to like-minded social media users from around the globe.



73% of Gen Z & Millennials view brands that support protesters on social media more favorably



51% of consumers said supporting community cleanups would improve their view of a brand



54% of consumers expect brands to take an active role in conversations about social issues



68% of consumers expect brands to be clear and #speakup about their values



1 in 2 adults said donations to social justice groups increase brand favorability in their eyes



56% of respondents said donating to small businesses would improve their view of a brand

The role of the social media influencer has evolved. Influencers have played a key role in the way in which events have unfolded over the last six months.

During the pandemic, influencers created opportunities for their audiences... to express themselves, connect with other people, and keep busy with activities to minimize the perceived threat of the uncertainty of a global pandemic.

When protests erupted, brands followed the lead of influencers... and content creators to determine what the next right thing to do was for their organization.

When the media turned its focus back to Election 2020, influencers reminded us... of the importance of voting, and the hard-won right of women and minorities to vote in the U.S.

The Shelf specializes in helping brands to leverage the power of influencers at every point along the path to purchase. But 2020 has taught us that the ability influencers have to compel people to take action extends far beyond the next outfit of the day post.

[@ashleynzimmerman](#)





Sources

The Drum <https://bit.ly/34vw3Az>
Engine Group <https://bit.ly/2Ttrlas>
Nielsen <https://bit.ly/3kx4MDi>
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Statista <https://bit.ly/2TolXuV>
Politico <https://politi.co/2TF1hyZ>
eMarketer <https://bit.ly/34vwzyv>
The New York Times <https://nyti.ms/31Jh6cd>
Kantar <https://bit.ly/3ohZbCW>
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Forrester <https://bit.ly/3dOYcWj>
Huffington Post <https://bit.ly/35zfJOh>
Voxnest <https://bit.ly/2HvdgwA>
Creosotemaps.com/blm2020/



THE SHELF

Move the needle.



Influence matters. Real influence is what will move the needle for your next social media campaign, and it's not always easy to spot. And since influencer marketing has matured past just getting brand lift, your KPIs have also probably shifted to sales, in-store traffic, and customer retention.

The Shelf platform can identify not just influencers, but also rate the verticals and categories in which creators wield the most influence. Our team finds and works with influential creators to help them shape messaging and create stunning visuals for brands like yours that measure success in Clicks, not Likes.

Contact The Shelf team. Tell us your goals, and we'll show you how to build an influencer campaign that will help you reach them.

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