



THE INFLUENCER REPORT

Engaging Gen Z and Millennials

An in-depth guide to how younger Americans interact
with the new class of cultural tastemakers



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INTRODUCTION

Influencers have become a central part of social media for young Americans, and social media is an increasingly central driver of consumer decisions. Nearly three quarters of Gen Z and Millennials follow influencers on social media, and a majority say social media is where they most often learn about new products they're interested in. Because of this, influencers provide brands with a key opportunity to reach young Americans – **so long as they adequately understand how and where to engage them.**

Based on over 2,000 survey interviews with **13-38 year-olds**, this report will explore the scale and nature of influencer engagement. We look at where young Americans follow influencers, who they like to follow, why they follow, how much trust they have in influencers, and how much interest they have in becoming influencers themselves.



- 1 Most Gen Z and Millennials follow influencers, and teenagers are more likely to follow many:** 72 percent say they follow at least some influencers.
- 2 For Gen Z, top YouTube influencers are as popular as major celebrities:** As many Gen Z men know gaming YouTuber PewDiePie as LeBron James. And PewDiePie is more well-liked.
- 3 And influencers are more trusted as spokespeople than celebrities:** 50 percent of Millennials trust influencers they follow on product recommendations, compared to 38 percent for their favorite celebrities.
- 4 Authenticity is the key trait people want to see in influencers they follow:** 88% say it's important for influencers to be authentic and genuinely care about their interests.
- 5 The potential micro-influencer market is massive:** Young Americans of all stripes are willing to post sponsored content, and a majority of them are likely to organically post about brands they like.

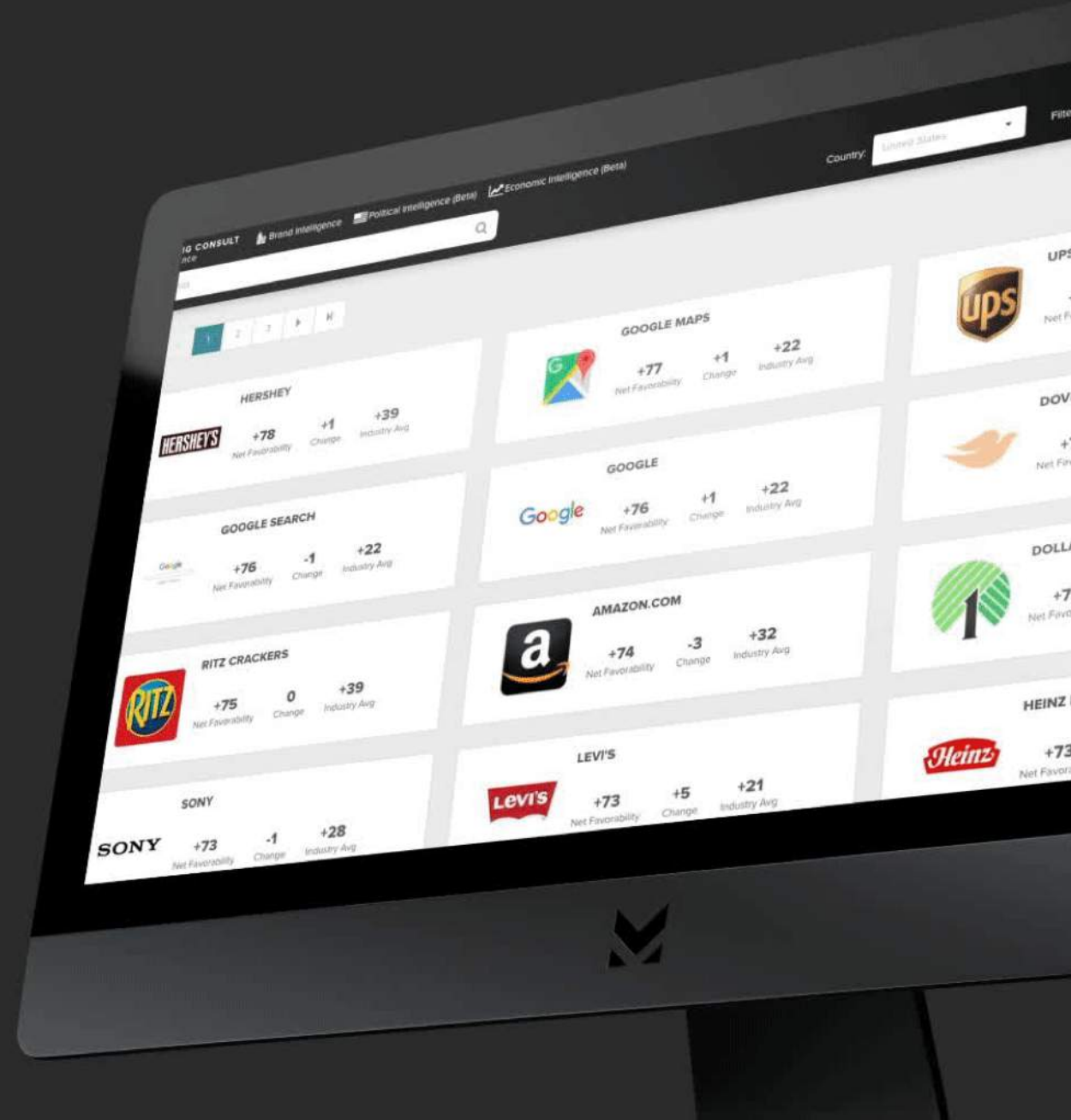


BRAND INTELLIGENCE

Morning Consult empowers **marketing, communications and brand insights leaders** to make data driven decisions around their brand:

- Tracking over 3,000 brands in 12 countries everyday
- Conducting over 10,000 interviews daily across over 100 demographic variables
- Measuring industry and competitor benchmarks daily
- Streaming over 100 million social media posts to aggregate social media, news, and economic data

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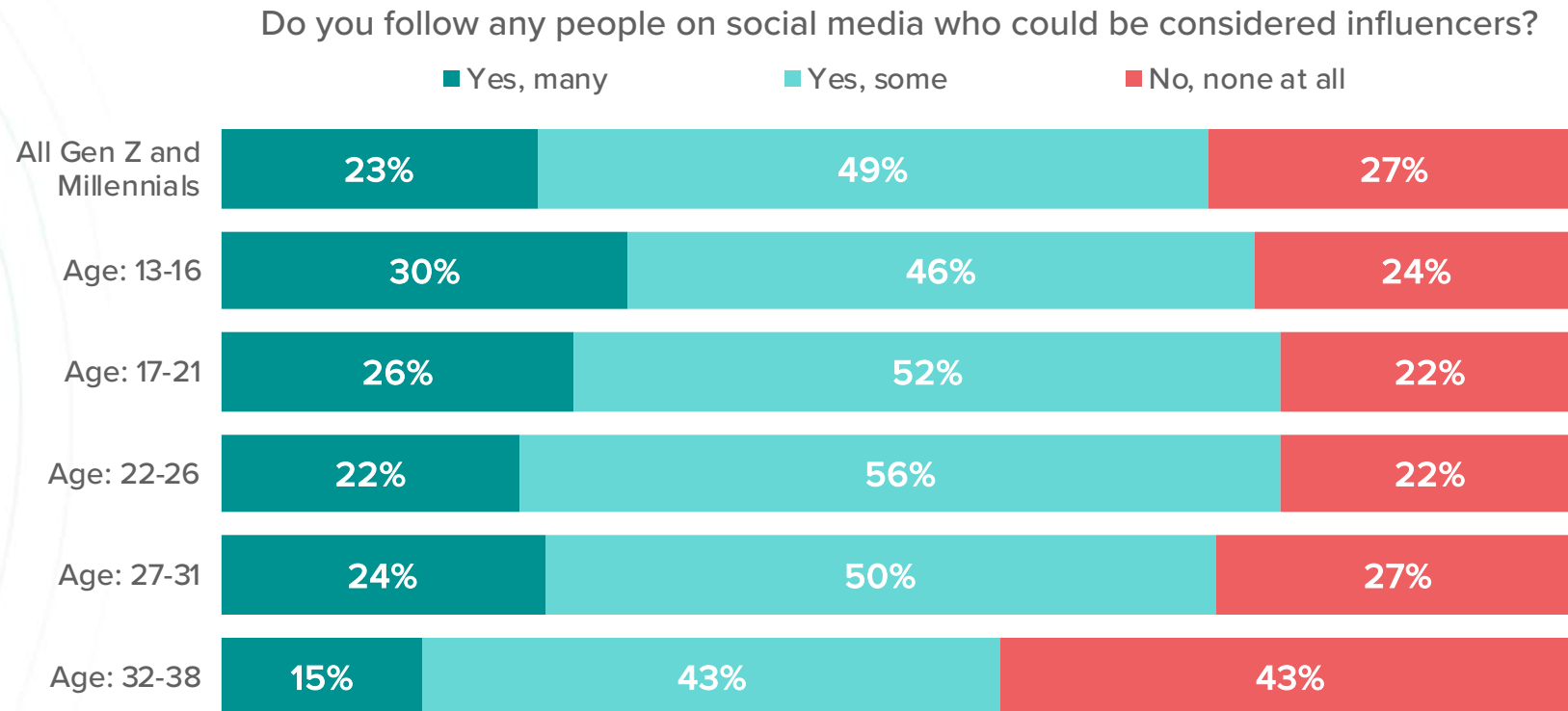
THE INFLUENCER MARKET

How much influence do influencers have over young
Americans and why they follow them.

THE INFLUENCER MARKET



72% of Gen Z and Millennials follow influencers, and teenagers are more likely to follow many

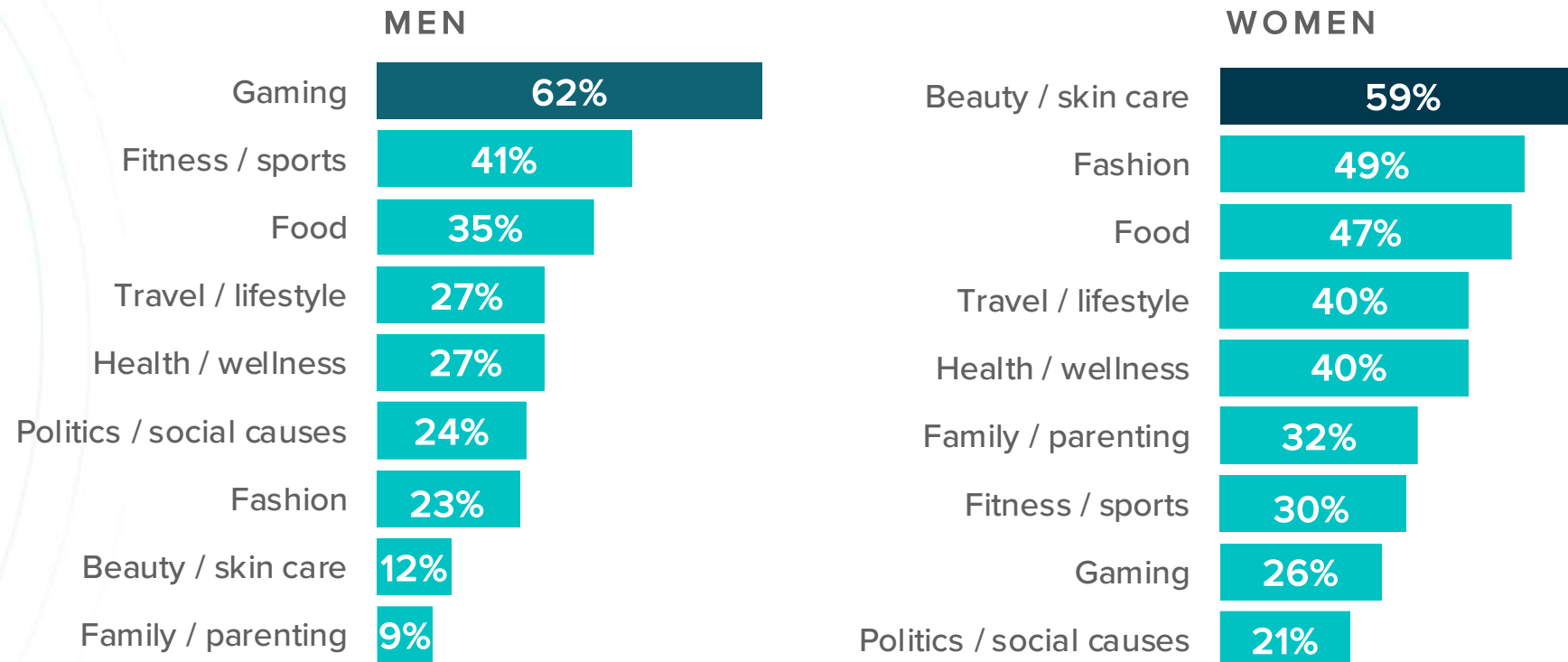


THE INFLUENCER MARKET



Men prefer following gaming and sports influencers.
Women prefer beauty and fashion.

Do you follow any social media influencers who post regularly about the following?



In their own words: Why young Americans follow influencers

Respondents were asked an open-ended prompt: **Why do you like to follow influencers?**

Inspiration and aspiration

"Seeing their successful lives inspires me to do better in my own."

"They inspire me to be who I am and they make me feel good about myself."

"To get ideas on how to start your own business or become an entrepreneur yourself."

"They can make a big positive change to society."

Voyeurism

"They are fun to watch and it's close as I get to meet someone famous."

"Honestly, I am a very nosy person and like to see what other people are up to."

"To see what they do with their lives and their wealth. It's intriguing to follow their life."

Learning about new trends

"To stay trendy. I like to know what's hot."

"I like to see the new beauty trends and what works and doesn't work. I like to make sure the products I'm going to spend my hard earned money on are worth it."

"They are more in tune to the things that I like so I follow them to see the newest trends."

Interesting, fun content

"They provide interesting content in a more personal setting."

"Usually they are very entertaining."

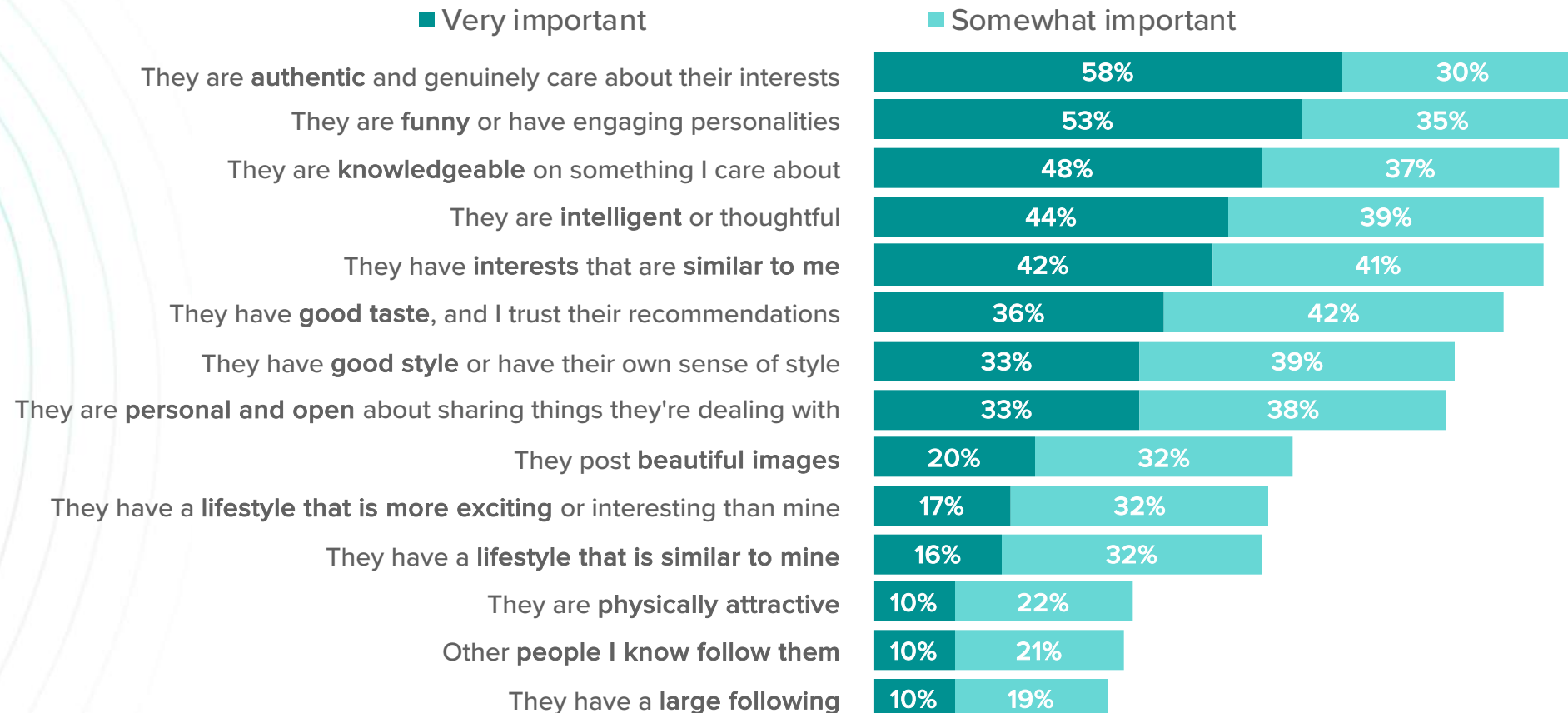
"To learn about new and interesting things they have to show, such as adventures and their lifestyle."

"I follow social media influencers because they produce content and information in a very entertaining way."

Some quotations are lightly edited for grammar or clarity.

Authenticity is the most important trait for influencers while 'having a large following' is less so

When deciding whether to follow an influencer on social media, how important are the following?



3

INFLUENCERS AND BRANDS

How brands can engage with influencers and the
platforms to engage on.



Social media is a crucial driver of consumer decisions for young Americans

88%

of Gen Z and Millennials learn about products they're interested in buying on social media.

24% say they learn about new products often on social media, 46% say they do sometimes, and another 18% say rarely.

56%

have purchased a product after seeing a post from someone they follow.

7% say they do this often, and 49% say they do this sometimes.

50%

say social media is where they most often learn about new products to buy.

20% say they most often learn about new products from advertisements on social media, 12% from social media posts from friends and family, **18% from influencers**, 15% from TV, 1% from newspapers or magazine, 3% from blogs, and 15% from word of mouth.

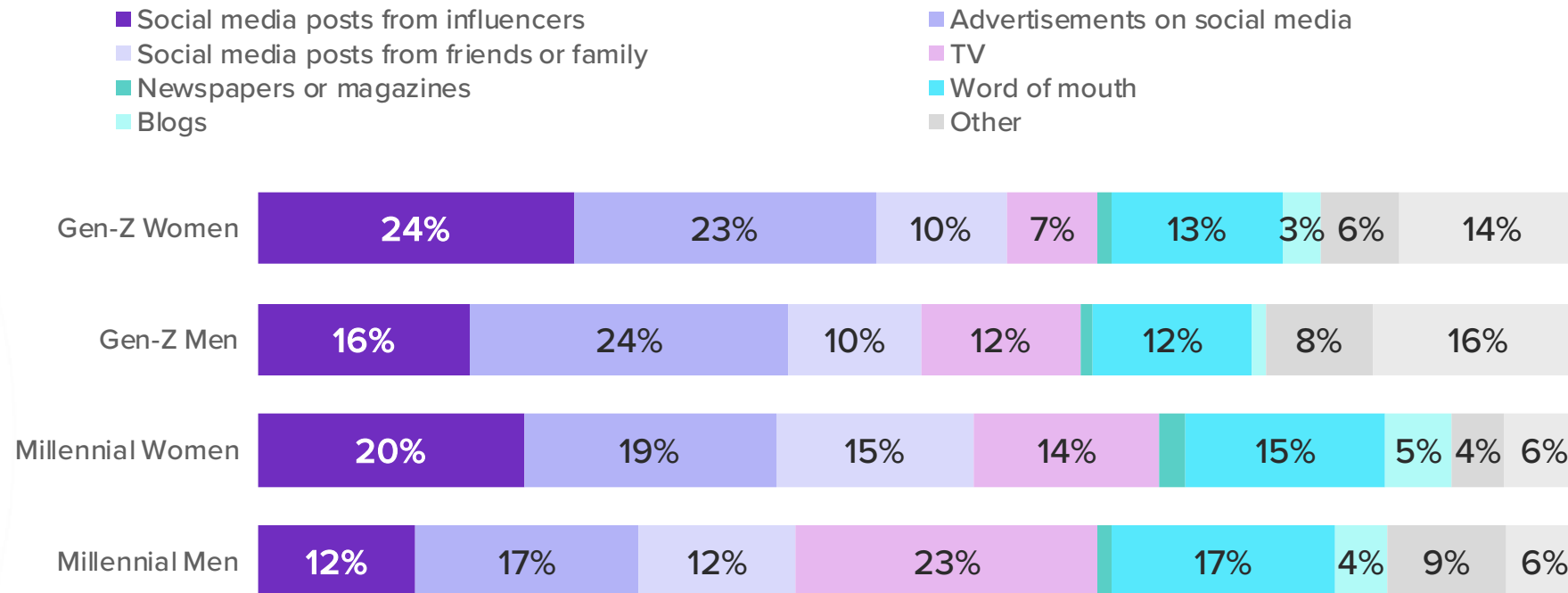
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INFLUENCERS AND BRANDS



Nearly 1 in 4 Gen Z women say influencers are where they most often learn about new products to buy

Where do you most often learn about new products you're interested in buying?

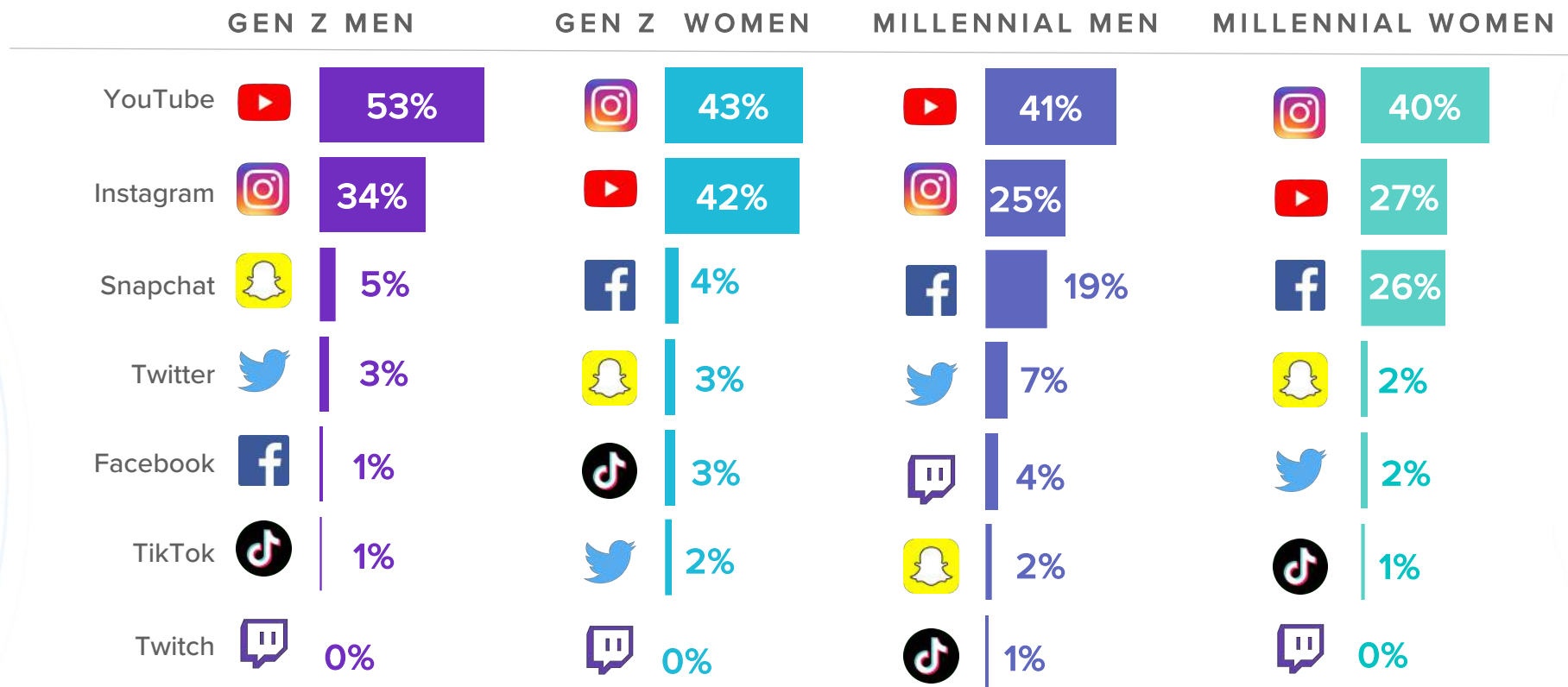


INFLUENCERS AND BRANDS



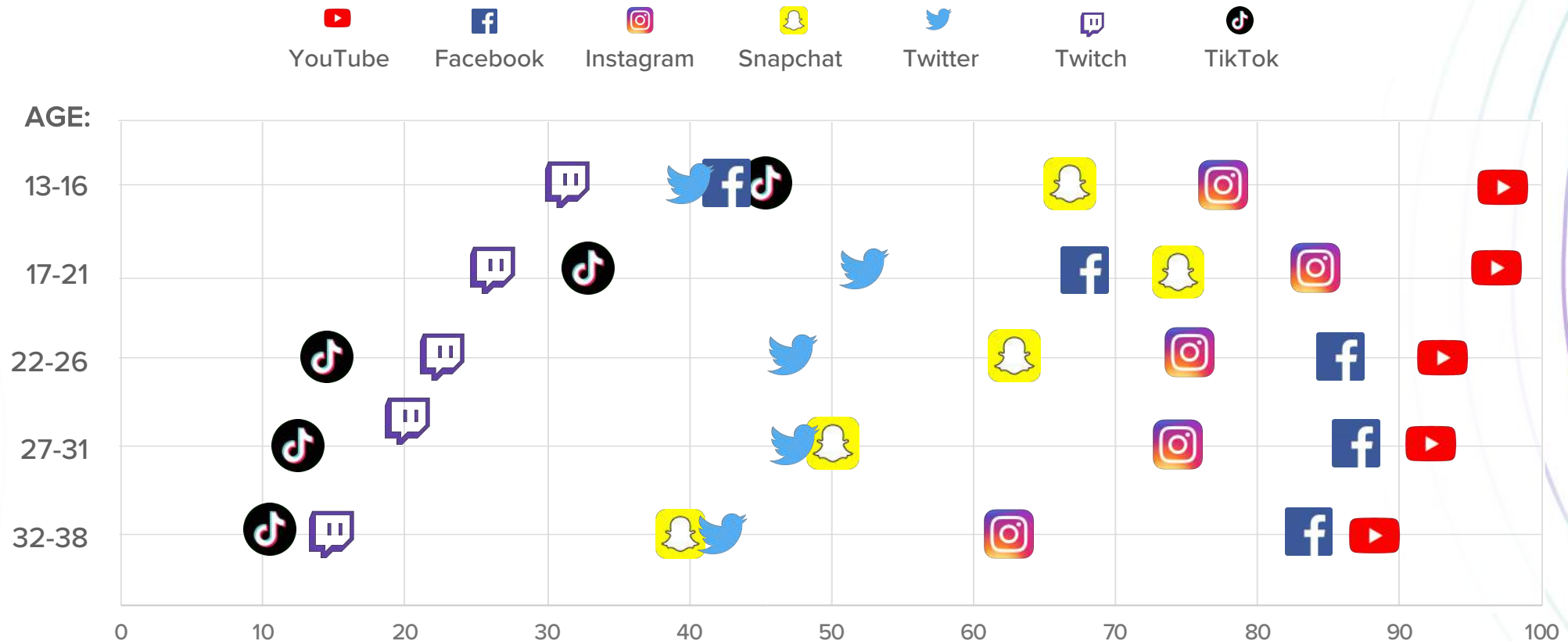
Among men, YouTube is the most popular platform for following influencers.
For women, it's Instagram.

What is your favorite site or platform for following influencers?



13-16 year-olds are as likely to use TikTok as Facebook and Twitter

Each logo represents the share of that age group who say they use the platform

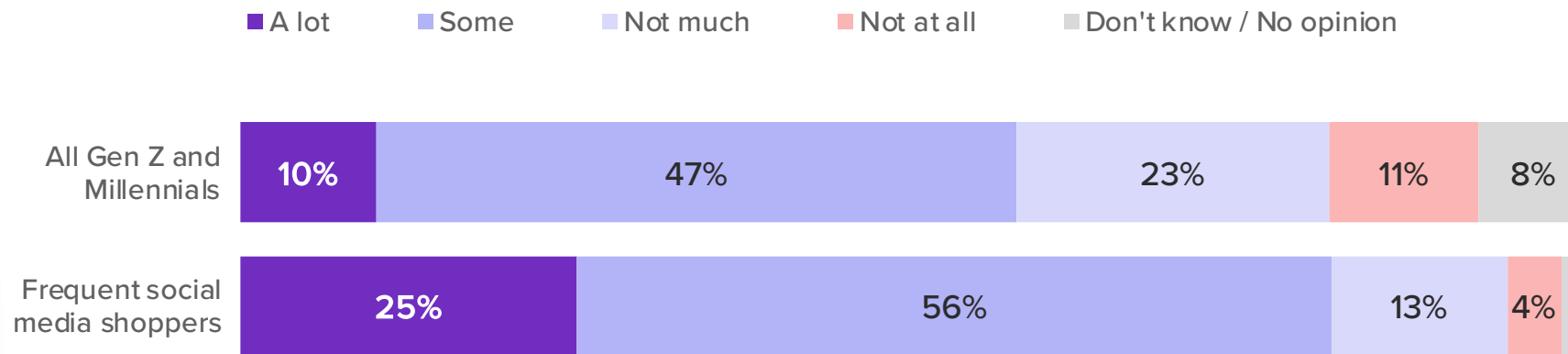


INFLUENCERS AND BRANDS



Just 10% say they have “a lot” of trust in influencers’ product promotions, while 39% have some. However, frequent social media shoppers are more trusting.

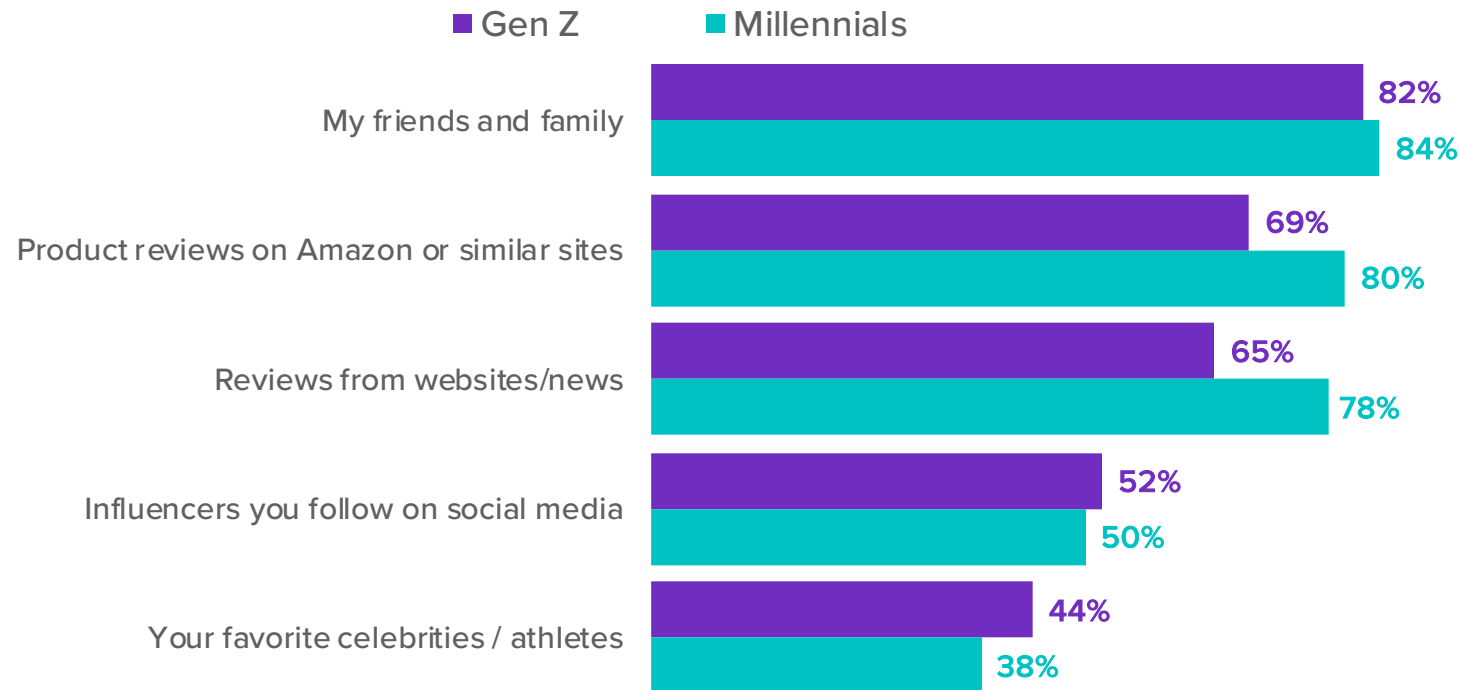
To what extent do you trust social media influencers to give you good advice about brands or products they are promoting?



Frequent social media shoppers are Gen Z and Millennials who say they “often” learn about new products they are interested in purchasing from social media. They make up 24 percent of the Americans age 13-38.

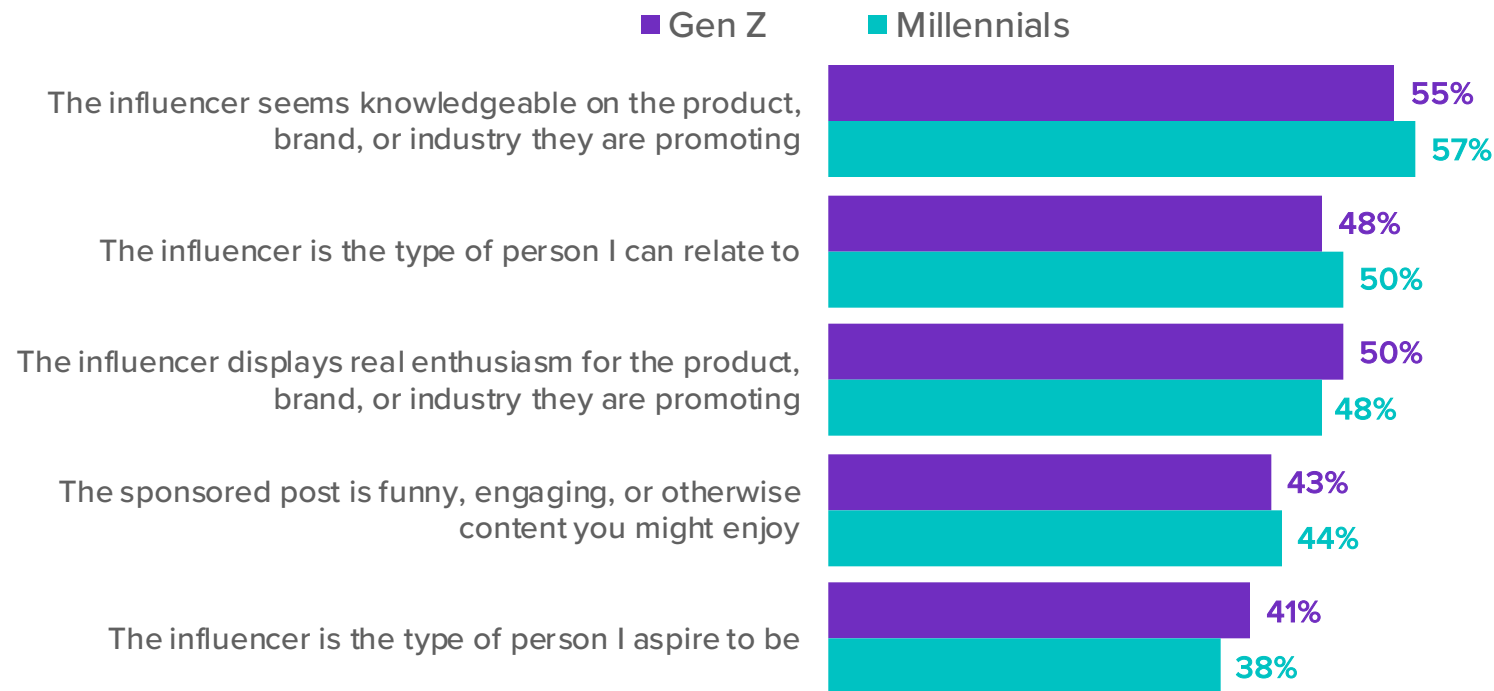
Influencers are more trusted than celebrities as brand spokespeople

The share who say they trust each of the follow to give good advice about brands or products they are promoting.



Being knowledgeable and relatable makes influencers more effective salespeople

Do the following make you more or less likely to buy a product or service that an influencer recommends?



4

BEING AN INFLUENCER

The degree to which young Americans want to be influencers themselves, and why.



Most young Americans are interested in becoming influencers

12%

consider themselves to be influencers

11% of Gen Z and 12% of Millennials say this label fits them.

27%

know an influencer personally

That includes 32% of the 22-26 year-olds, the highest level for any age group.

54%

would become an influencer, given the opportunity

26% strongly agree they would take the opportunity to become an influencer, and 28% somewhat agree

86%

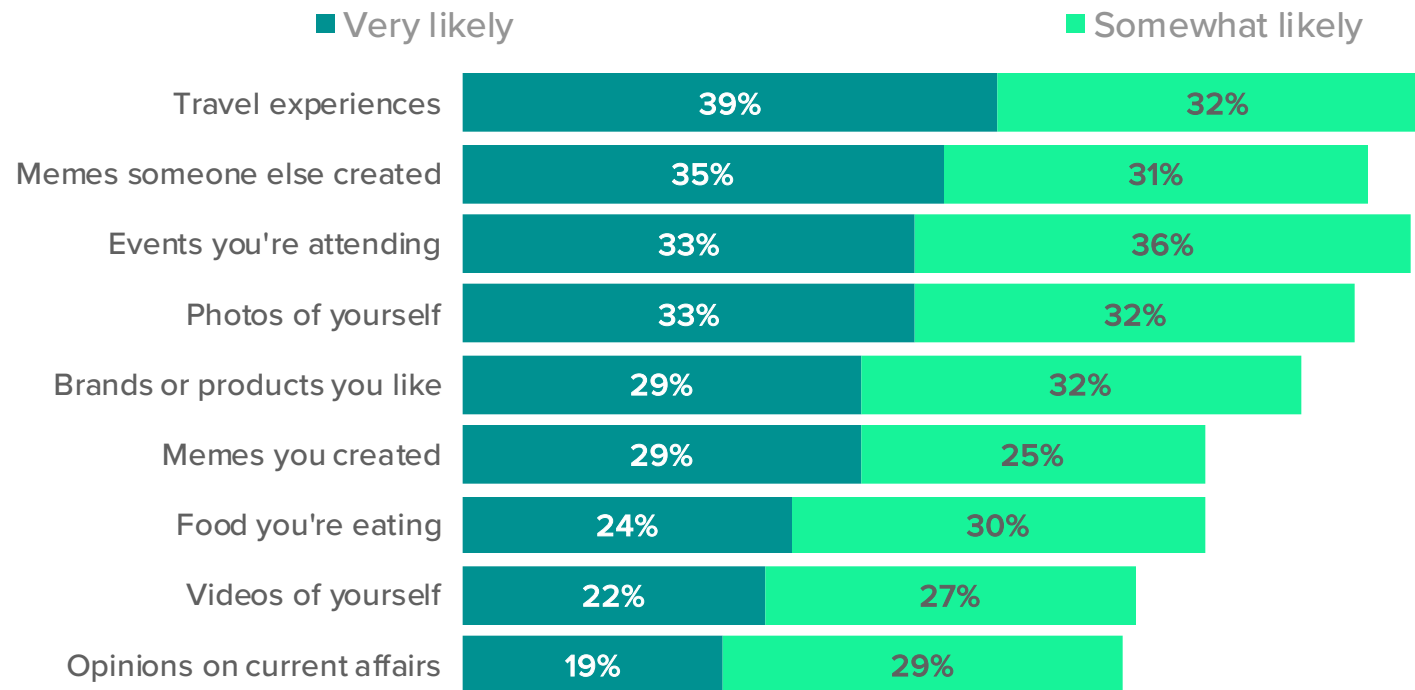
are willing to post sponsored content for money

66% say they would accept money to promote a product on one of their personal social media channels if they liked the product. Another 20% say they would do so even if they don't like the product.

61% of young Americans are likely to organically post about brands they like

A higher share say they're likely post about brands and products than food they're eating

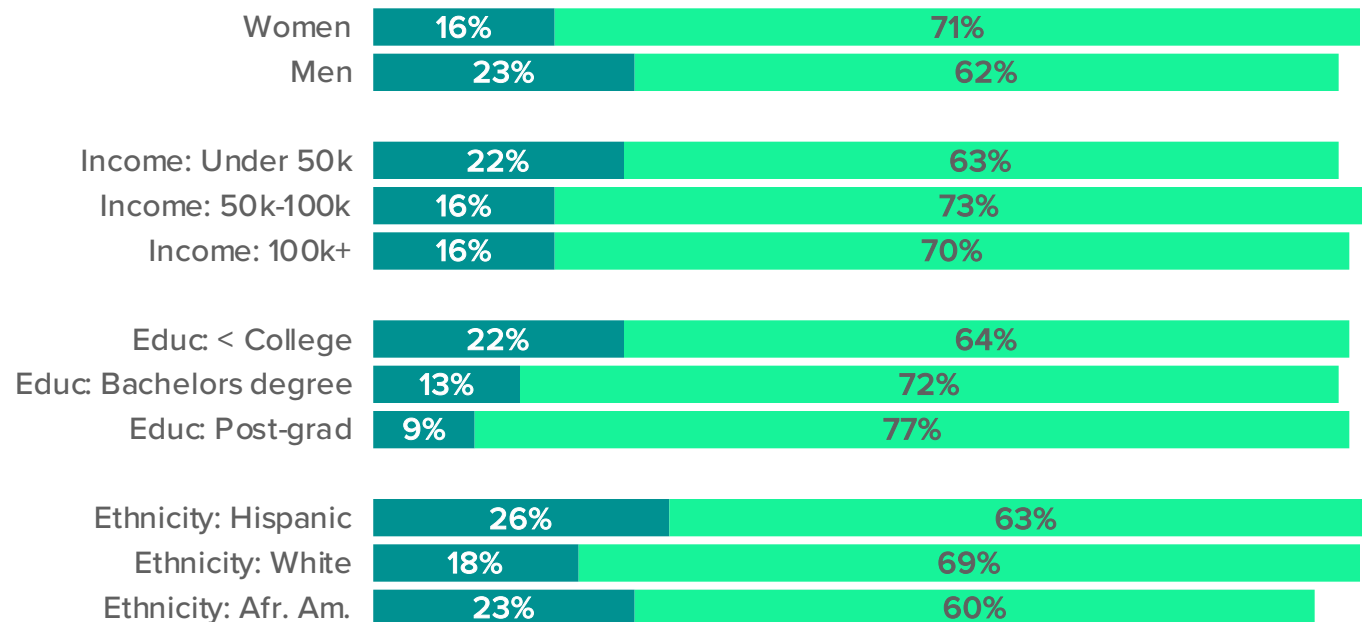
How likely are you to share the following on social media?



The potential micro-influencer market is massive: Young Americans of all stripes are willing to post sponsored content for money

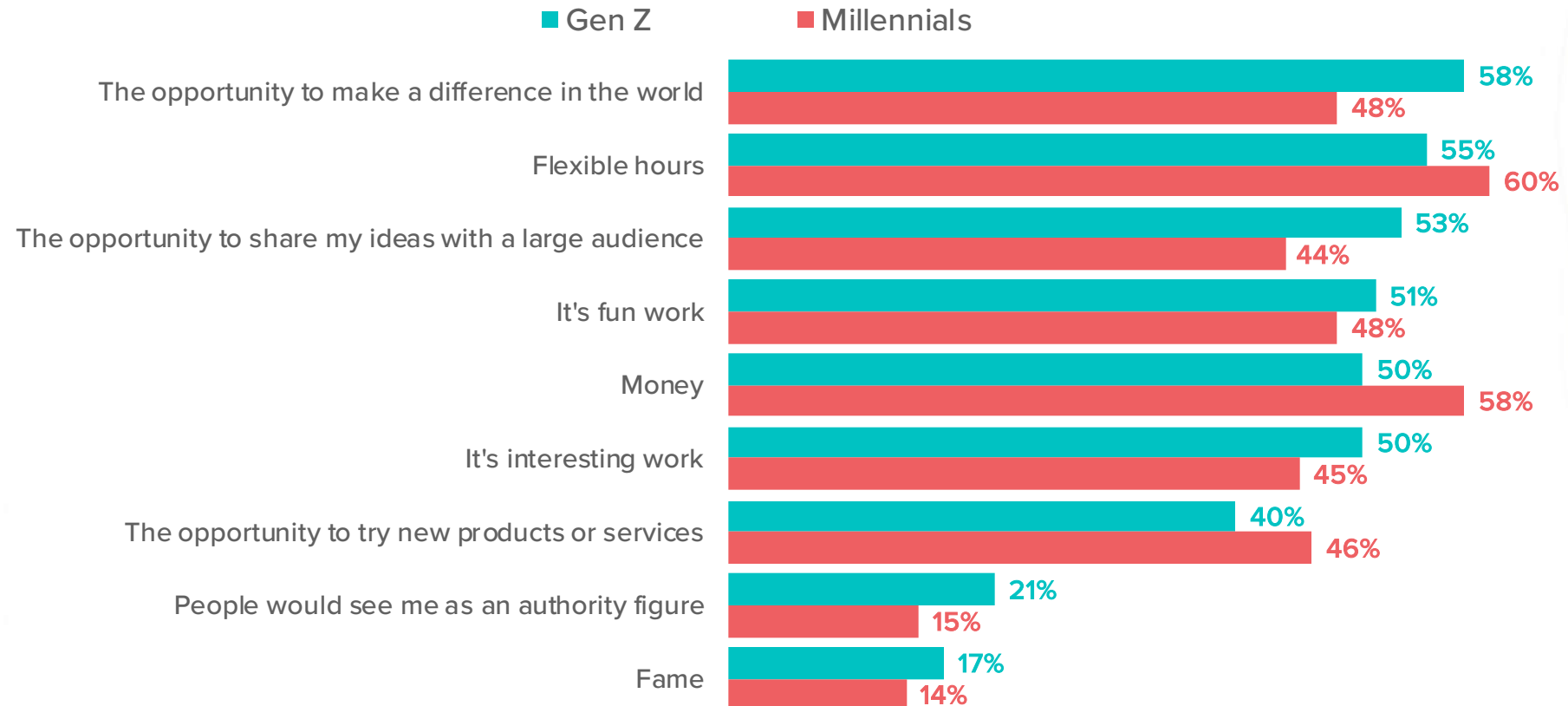
If a brand reached out to you and offered you money to promote their product on one of your social media channels, would you accept?

■ I would accept it even if I did not like the product ■ I would accept if I liked the product



Gen Z and Millennials have different motivations for becoming influencers

The share who say each of the following be a major reason why they would want to be an influencer on social media



5

THE INFLUENCERS

Who are the most influential influencers and what
young Americans think about them.

THE INFLUENCERS

We asked respondents to name their favorite influencer. The results demonstrate how large and diverse the field is.

Most influencers got mentioned just once or twice, and only a handful were mentioned frequently, illustrating how niche the audience is for many influencers.

Results ranged from well-known celebrities to obscure Instagram accounts.

These are the names that received at least three mentions.



PEWDIEPIE
JEFFREE STAR
SHANE DAWSON

MARKIPLIER KYLIE JENNER

JACKSEPTICEYE THE ROCK WILL SMITH

DAVID DOBRIK KIM KARDASHIAN

DONALD TRUMP BILLIE EILISH ARIANA GRANDE NINJA

BEYONCE JENNA MARBLES JAMES CHARLES CARDI B

LEBRON JAMES TAYLOR SWIFT JOE ROGAN RIHANNA

BEN SHAPIRO MRBEAST TATI WESTBROOK BTS EMMA CHAMBERLAIN

SELENA GOMEZ CHRISSY TEIGEN GAMEGRUMPS DRAKE CHRIS BROWN

GRETA THUNBERG HANNAH BROWN BERNIE SANDERS MINI LADD

LOGAN PAUL SAM AND COLBY TOM HOLLAND LIZA KOSHY ACE FAMILY

EMINEM FAZE RUG GABBIE HANNA MA STEVEN CROWDER BESTDRESSED MIA MAPLES

CAMILLA CABELLO MKBHD JUGGLING THE JENKINS KENDALL JENNER NICKI MINAJ

KHLOE KARDASHIAN KING BACH LAURA LEE POST MALONE SAFIYA NYGAARD DK4L

TANA MONGEAU TIM POOL VANOSS WHITNEY SIMMONS CARLI BYBEL CODY KO FITZ

CORYXKENSIN DASHIE JAKE PAUL JAY Z KSI KEVIN HART LELE PONS LIL WAYNE

THE INFLUENCERS



The most popular influencers are...

Respondents were asked to think of their favorite influencers, and **name the top three that came to mind**. These are the people who received the most mentions.

With the exception of Kylie Jenner, each of the top 5 are YouTubers.



PewDiePie

YouTuber
64 mentions



Jeffree Starr

YouTuber
61 mentions



Shane Dawson

YouTuber
43 mentions



Markiplier

YouTuber
38 mentions



Kylie Jenner

Model, media personality
35 mentions

THE INFLUENCERS



For Gen Z, YouTubers are as well-known and well-liked as major celebrities

Ninety-five percent of Gen Z males are familiar with PewDiePie – the same level of name ID as LeBron James. What's more, this cohort has a more favorable view of PewDiePie than James.

AMONG GEN Z WOMEN

	Name ID	Fav
Beyoncé	99%	67%
Zendaya	95%	72%
Shane Dawson	86%	51%
Serena Williams	81%	38%
Jennifer Aniston	80%	44%

AMONG GEN Z MEN

	Name ID	Fav
Justin Bieber	98%	18%
PewDiePie	95%	62%
Lebron James	95%	55%
Steph Curry	86%	47%
Elon Musk	84%	57%

THE INFLUENCERS



Jeffree Star is far more popular with Gen Z women than men

The tables highlight demographic groups that have particularly favorable and unfavorable opinions of each influencer.

Have a particularly **favorable** opinion

Have a particularly **unfavorable** opinion



PewDiePie

	Fav	Unfav
Gen Z men	62%	20%
13-16 year-olds	58%	19%
Republican men	44%	19%
Clinton voters	17%	27%
Millennial women	13%	17%



Jeffree Star

	Fav	Unfav
Gen Z women	40%	26%
Frequent social media purchasers*	34%	25%
13-16 year-olds	28%	23%
Gen Z men	15%	28%
Conservatives	17%	26%



Shane Dawson

	Fav	Unfav
Gen Z women	51%	14%
13-16 year-olds	44%	18%
Hispanics	37%	19%
Gen Z men	30%	23%
Democratic men	22%	22%

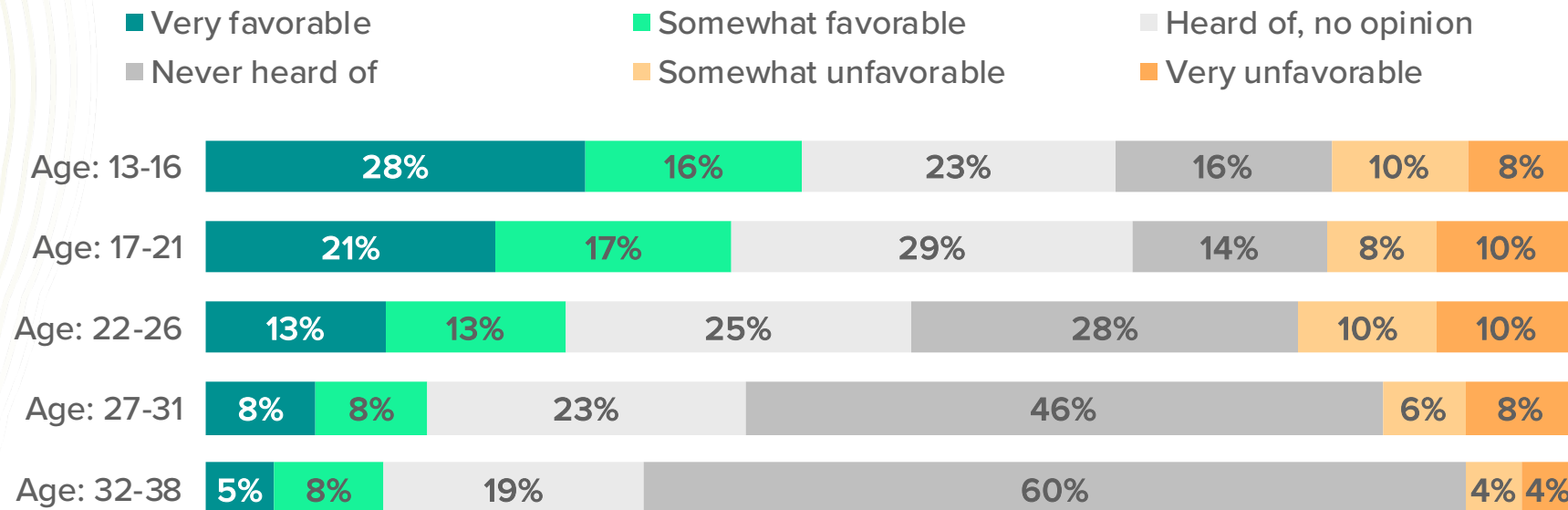
Shane Dawson appeals to similar demographics as Jeffree Starr, but is more universally well-liked.

THE INFLUENCERS



Shane Dawson is beloved by many teenagers, but most older millennials don't even know who he is

Do you have a favorable or unfavorable view of Shane Dawson?



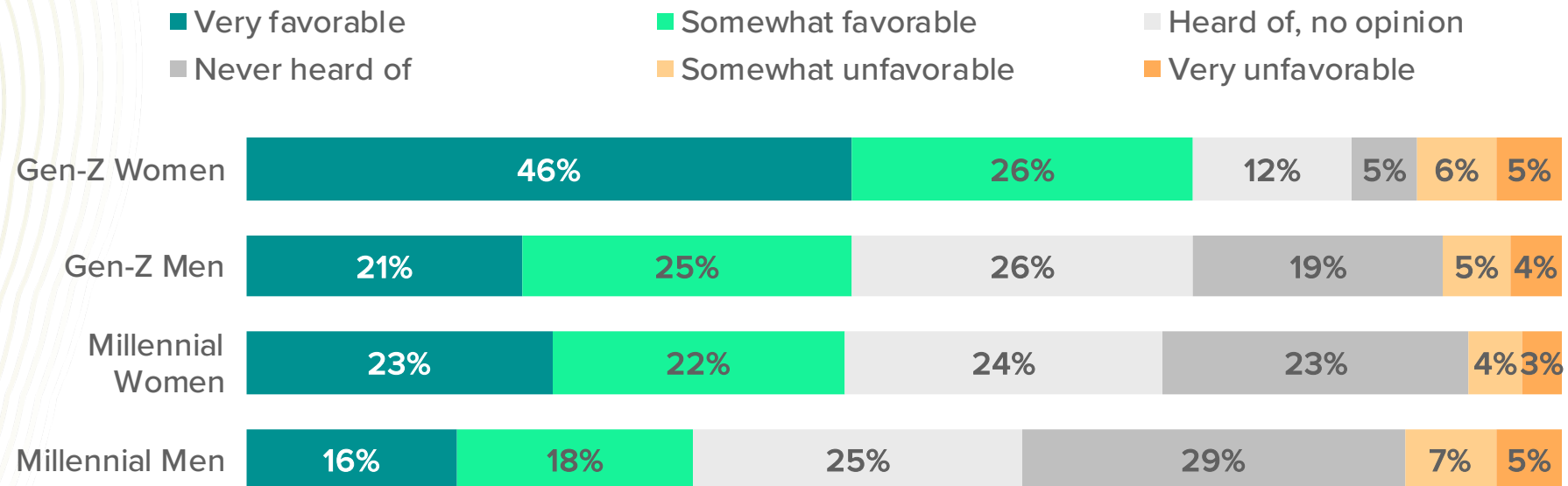
THE INFLUENCERS



Zendaya is hugely popular with young women

72% of Gen Z women have a favorable view of Zendaya. That's higher than Rihanna (71%), Ellen (69%), and Beyoncé (67%).

Do you have a favorable or unfavorable view of Zendaya?



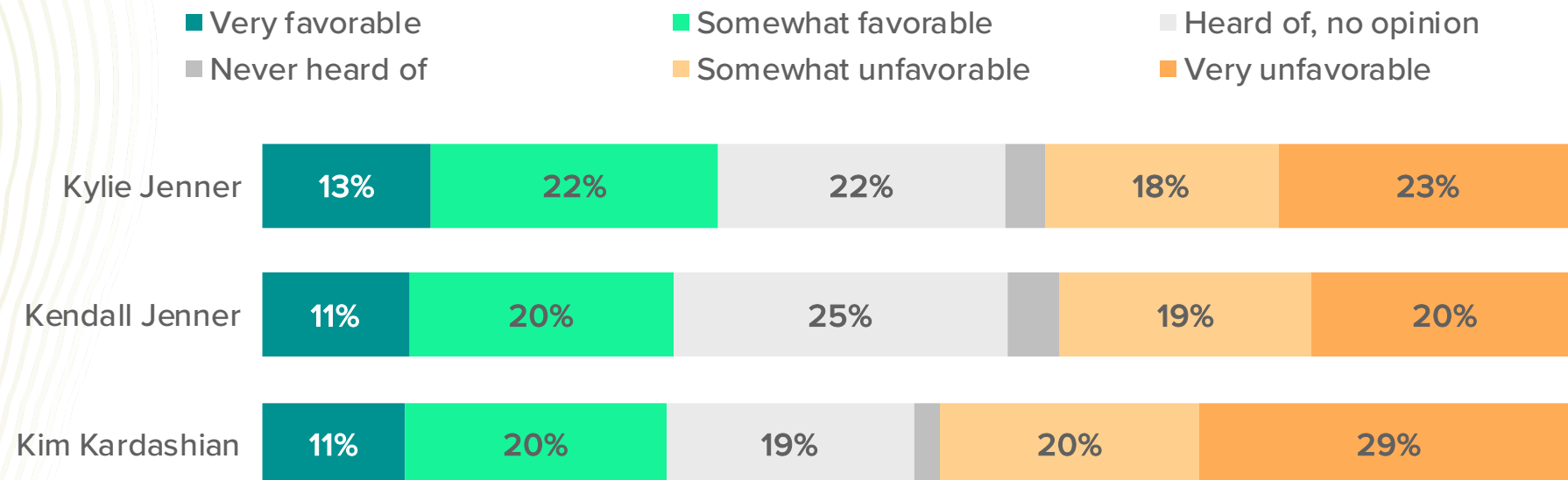
THE INFLUENCERS



Even among Gen Z women, the Kardashians are highly divisive

Kylie, Kendall, and Kim all have net negative factorability ratings with Gen Z women.

Do you have a favorable or unfavorable view of each of the following?



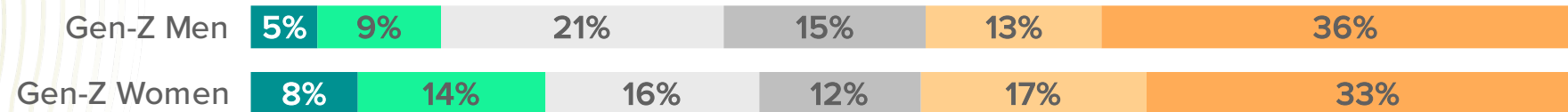


Despite prominence, certain top influencers are divisive

Do you have a favorable or unfavorable view of each of the following?

■ Very favorable ■ Somewhat favorable ■ Heard of, no opinion
■ Never heard of ■ Somewhat unfavorable ■ Very unfavorable

JAMES CHARLES



JEFFREE STAR



TATI WESTBROOK





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