



SOCIAL MEDIA INFLUENCERS

A Generation Nation Companion Report



WHAT WE DID

We set out to learn about Gen Z and Millennials' interaction with social media influencers – particularly the purchases they make because of influencers.



HOW WE DID IT

We just asked! They told us, in their own words, in a 25-minute qualitative interview with 204 people. And we probed their responses in an AI-delivered conversation.



WHAT WE ASKED

We talked about their favorite influencers, why they trust them, what they bought and what we like to call 'the egg or chicken first' question: **Is an influencer more credible if they become famous as an influencer or if they were famous first?**



**WHAT WE
FOUND ...**

First, a little history ...

In 2019, Quester conducted a landmark project in conjunction with 747 Insights and Collaborata:

GENERATION NATION 2019: Defining America's Gen Z, Millennials, Generation X and Boomers

This study provides a comparison of attitudes and behaviors across 4,012 respondents in these four cohorts, to expand upon current intelligence and cut to the core of what it means to be an American in 2019.

Aided by technology, media, politics, and more, we can see generational values shifting at a faster pace than we've ever seen before.

It's a great report. You should totally read it.



We set out to not only collect information about each of these generations, but also to develop a deep understanding about who they are, and their experiences.

One area of focus was to deep dive into the way the generations see each other ... and themselves.

So, what's the deal with Influencers?

In an age where connecting with people has become (logistically) easier but (emotionally) more difficult (especially for Gen Z), **Influencers provide a personal connection to things like apparel and beauty.**



It's like the Gen Z equivalent of an Avon or Mary Kay lady! Which is something that probably no Gen Z would understand.



They're like a **knowledgeable friend** who provides a **sense of fun, entertainment and connection** – and really **helpful advice and inspiration.**

The key for an Influencer is all about TRUST ...

Which is why ...



76%

Say an influencer who became famous is more credible than a famous person who became an influencer



Influencers are real people who aren't seen as serving up a sales pitch – it's not a commercial, they're showing a product, in an honest and reliable way.

The connection followers feel is strong – Influencers feel like friends (hello, modern day Mary Kay lady) – so followers want to support them or even (shamelessly) *be like them.*

Gen Z and Millennials see Influencers a little differently



Gen Z followers are more likely to feel a connection to Influencers, while Millennials are more likely to express distrust.

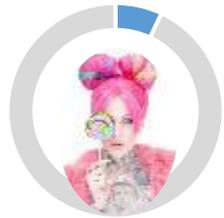
This seems on point with other research we've done that suggests Gen Z feels comfortable with online connections, but not always real-life ones.

Additionally, Gen Z finds them to be a source of entertainment (while Millennials may be more specifically focused on the service they provide).



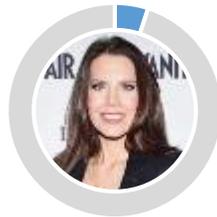
Top Influencers

No Influencer rises to the top when it comes to who Gen Z and Millennials follow, but the top 5 are all in the beauty industry



7%

JEFFREE STAR



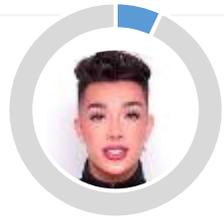
5%

TATI WESTBROOK



3%

PEWDIEPIE



7%

JAMES CHARLES



5%

KIM KARDASHIAN



3%

DAVID DOBRIK



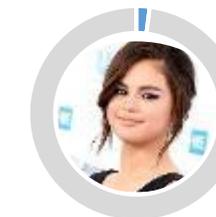
6%

KYLIE JENNER



4%

SHANE DAWSON

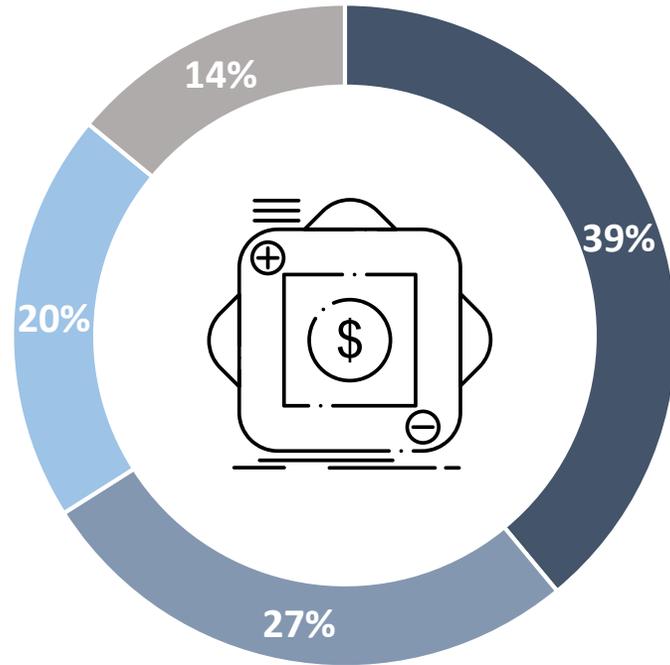


2%

SELENA GOMEZ

Apparel and beauty products are purchased most based on inspiration from an Influencer

Last Time Purchased Product Based on Influencer



- Within the last week
- Within the last month
- Within the last 6 months
- More than 6 months ago

Based on quantified qualitative

Top Categories Purchased



28%

APPAREL

Clothing, jewelry, accessories, shoes



27%

BEAUTY

Makeup, skincare, haircare



18%

TECHNOLOGY

Phone, phone accessories, gaming, computer/laptop



7%

FOOD/BEVERAGES

Alcohol/beer, candy/sweets, tea, soda



5%

HEALTH/FITNESS

Vitamins/supplements, accessories

Influencers are followed most on Instagram



Gen Z 67% vs. Millennials 50%



Millennials 38% vs. Gen Z 22%



Gen Z 27% vs. Millennials 15%

Influencers are discovered on social media more among Gen Z compared to Millennials



44% Social Media
(Gen Z 51%; Millennials 37%)
Mostly YouTube



30% Recommendation
From someone else or a social
media platform suggestion



15% Other Forms of Media
TV shows, music, sports, etc.



13% Searching and Scrolling
General internet browsing

Influencers are followed because of their entertainment value

Gen Z



HILARIOUS & ENTERTAINING

They're funny, really funny. But it isn't just mindless humor Gen Z is after – they seek out quick wit, intelligence, and intriguing viewpoints they may not have considered



GENUINE & HONEST

Often touted as “down to earth” and “real” – they're “not shady” and don't hide. Influencers are role models – help them define who they want to become



HELPFUL

Gen Z is always learning from influencers – they feel like they're being educated by a good friend. Personally: makeup tutorials, fashion, gaming. Social issues: LGBT, sustainable living, bullying



INSPIRE & EMPOWER

Positive personality is infectious – inspires them to action or at least an escape from their own world. If a YouTuber their age can build an empire ... then the world is wide open...



They are the closest example of the type of person I want to be so by following them, I learn a lot to implement and improve my life. These can be fashion trends, social cues, health and fitness tips, self- confidence boosting exercises, and dating/relationship advice.

Millennials



OFTEN FUNNY BUT MUCH MORE

Millennials appreciate a sense of humor but they need more – smart, wise, relatable. They expect to gain something that will help them in their daily lives or career – not just be entertained



REAL & HONEST

Millennials can sniff out a fake influencer in a minute. They seek out honest and relatable people who are worth “spending their time with” – in this busy stage of life



PROVIDES A VALUABLE SERVICE

Influencers have a deeper purpose for Millennials – they do the upfront work on products: find what's on trend, buy, test, and provide honest reviews. Influencers allow them to “window shop”



INSPIRE & EMPOWER

Same as Gen Z – a positive influencer creates wave of happiness – lifting them up. They feel motivated and inspired in their own lives and love when an Influencer “does good in the world”



I follow them because they offer discounted goods and services with referral codes. I also like finding out about products I haven't heard of ... someone who has already tried and tested and reviewed them so I don't waste my time or money.

Followers find a source of entertainment and education specific to their interests from their favorite influencer

Gen Z (44%) focus more on entertainment compared to Millennials (24%)



34%
Entertainment

Often through humor, or helps them relax



32%
Learning

Specific to topic of interest; stay up to date; exposure to someone else's opinion to understand another perspective



30%
Similar Interest

Influencer's content is specific to follower's hobbies – beauty, style, fitness, video games, music, cooking/baking, etc.



24%
Inspirational

Inspires follower to accomplish their goals, pursue interests; encourages them to be a better person; provides positivity



18%
Products and Reviews

Able to learn about new products and see honest reviews from a trustworthy source; sometimes get a discount



8%
Improves Mood

Makes them happy, improves their mood



7%
Sense of Connection

Gives a glimpse into the influencer's life, makes them feel a part of it; provides a sense of community

In Their Words ...



Influencers are entertaining and funny

“Their entertainment value and a lot of positive traits about them, such as their values, honesty and if they are funny and caring. I have a hard time being influenced by people who don't have similar core beliefs as me.” – Gen Z

They're relatable, positive and real people who have similar interests/hobbies

“They talk about real life events also. They don't only talk about games or movies or whatever, if something tragic happens they talk about it and I like that about most influencers.” – Gen Z

You can learn from Influencers and be inspired by them

“If you are looking for a daily inspiration and practical tools to help shift your mind then you can follow this person because she is always coming out with such great stuff.” – Millennial

Influencers expose you to new products and brands

“They give real reviews on products and tell you the truth about what is worth buying. That it's worth the money you spend and not something that is low quality and doesn't work.” – Millennial



Trust is what differentiates Influencers from other ways of learning about products

30% - Trust the influencer to give their honest opinion

It's someone they know who is "real"

- *"Well I definitely know that they've been using the product for a while. Also, because I **know the influencer** I kind of **develop a sort of personal relationship...**" – Gen Z*

It's not a sales pitch, instead the influencer is presenting the product and providing their thoughts, rather than "promoting" something

- *"They make it seem **seamless** and **less like they are pitching it**. It's like **getting a recommendation from a friend**. They are showing me something and I try it. It is pretty easy to do."*

26% - See product in action

Able to see the product in action so it's more informative and reliable

- *"The person that made the recommendation tries a lot of makeup for her channel and **her demonstration was all the proof that I needed**. For someone to just tell me about a product without showing me, I would most likely not buy. I have to see to believe before I will make a purchase."*

14% - Want to support or emulate the influencer

Followers feel like they are supporting and representing the influencer

- *"...you feel like it's a way of **helping them** earn money. They always mention about how YouTube isn't the most stable job ... it's also a way to **show off to people who you watch**."*

They essentially want to copy the influencer, or are inspired by their content

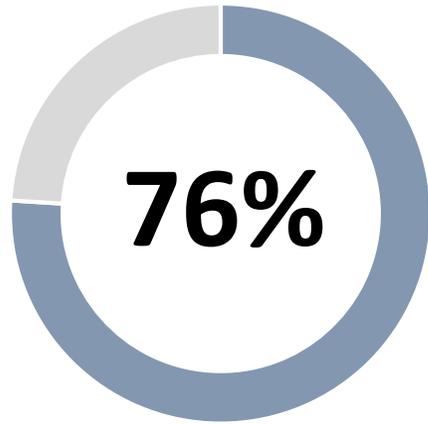
- *"The influencer was wearing a pair of sandals that were super cute ... **Having something even similar to hers made me feel so awesome**."*



*When a product is presented by an influencer you get an **honest opinion** and can **see for yourself** on video how well or how poorly the product performs. Whereas, an ad **on TV could possibly be exaggerating** with special effects. - **Millennial***

Influencers who become famous are more credible than famous people who become influencers because Influencers have to work for their success ...

.... according to



Because ...



They earned their success working from the ground up, compared to famous people who “have weight behind their name”

- *Influencers had to **start from the bottom** and **rise on their own** compared to famous people who most likely had **help along the way** - **their views are already skewed.***

They're relatable and more genuine compared to famous people

- *They are more **genuine** and **understand the people.** Famous first are usually actors **portraying what people want to hear.***

Famous people are motivated by **money and endorsements**

- *Because if a famous person is doing it, it makes them seem **desperate for money.***

They have a passion for what they do and became famous for it

- *I think that they are a person that was just a normal person with a normal job and had a **passion for something** and worked hard to make it come to life.*

Influencers are trustworthy because they're "real" people who Followers feel they truly "know"

Followers trust Influencers because they are "normal," "regular" people who are "genuine" and "honest"

Plus, they feel a connection to them,
as if they are friends

More common among Gen Z compared to Millennials



*They are **human beings** and you can **feel a connection** so it's like a **recommendation from a friend.***



INFLUENCER IS SUCCESSFUL

They've accomplished a lot, have longevity in the industry and a good work ethic



FOLLOWERS EVALUATE THE CONTENT OR REVIEW

Look at past posts; Influencer shows product and uses/wears it; include both positive and negative points about product



SPONSORSHIPS IMPACT TRUST

Consider if and how many sponsors Influencer has, if they disclose them – even better if the review isn't sponsored

Some state Influencers are not trustworthy

More likely among Millennials compared to Gen Z

In the Weeds – Conversation & Detail



WHO WE TALKED TO

- Gen Z (13-21) and Millennials (22-38)



204 Online interviews with AI moderator



TECHNIQUES APPLIED

- ✓ Customized probing
- ✓ In-depth language review
- ✓ Quantified qualitative language analysis



Today, I'd like to hear your thoughts about social media influencers. To start off, tell me which influencers you follow.

If you had to pick just one, which social media influencer is your favorite?

Now I'm curious to know what it is about that person that makes you want to follow him/her. So talk to me about that ... help me understand why you follow this influencer.

Think back to when you first started following this influencer and tell me how you discovered him/her.

As you think about this influencer, help me understand what following them does for you. In other words, tell me what's in it for you.



I've heard influencers often use and promote products. Earlier you indicated you purchased a product based on an influencer's post. I'd love to understand your thoughts on this ... so talk to me about how a product presented by an influencer is different from other ways you learn about a product.

Now I'm curious to understand what makes you trust influencers ... so talk to me about that. Help me understand what makes them trustworthy.

Before we wrap up, I'd love to get your thoughts on the next big influencer. Tell me who is the "next big thing" that, eventually, a lot of people are going to end up following.

I'm curious about one last thing. From your perspective, is an influencer more credible if they became famous as an influencer or if they were famous first?



If you're like us, you're obsessively curious about interesting trends. That's why we launched ***Beneath the Trend***.

Beneath the Trend reports demonstrate the depth of information that can be gleaned from Quester's artificial intelligence-backed software moderator.

If you have ideas for future ***Beneath the Trend*** research topics we'd love to hear them!

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