BELGIUM UNDER THE INFLUENCE

A comprehensive paper about Influencer Marketing in Belgium

September 2018

isobar | B:A/M! INFLUO profacts

Foreword

There are plenty of partnerships between brands and Influencers. Marketers increasingly work with them; driven by competition, the need for novelty, the resurgence of ad-blockers and a handful of viral cases that make them dream.

But what do we really know? There are no real insights for our market. How many people follow influencers? What are the most interesting topics? What is the purchase intent after seeing an Influencer's post? Can Influencers change the perception people have of products and services?

To answer these questions, **Isobar Belgium** (Dentsu Aegis Network Belgium) worked on a comprehensive study, supported by its partners: the **Belgian Association of Marketing**, **Influo** and **Profacts**.

Influencer marketing (at digital level) is still in infancy. Several challenges will need to be addressed in the years to come. Like any teen, Influencer marketing makes and will continue to make mistakes: Fake followers, fake likes, uneven content quality, etc.

We build the plane as we fly it, and there's still a series of crucial questions that must be answered to better understand this touchpoint, and the role it plays in the consumer journey. What is the desired impact? Does influencer marketing work for awareness campaigns? Does it trigger sales? What is the engagement rate that we can hope for? What kind of topics will be more relevant or efficient?

We hope you now have part of those answers in your hands, and wish you a happy reading!

About the paper

It was time to further professionalize the touchpoint, and we felt this could only be done with tangible, relevant and 100% Belgian insights.

In order to guarantee a professional approach and obtain a complete understanding of the influencer effect in Belgium, **Isobar** (the full-service digital marketing agency of Dentsu Aegis Network) launched ***"Belgium Under The Influence"***. A comprehensive survey aiming to answer the sector's major questions and challenges, broken down in three chapters:

- **Chapter 1, Consumers**: an effort to understand the impact of influencers on the general public, and its perception of the touchpoint - in partnership with **Profacts**.

- **Chapter 2, Influencers**: designed to identify the desires and expectations of the influencers themselves, and understand the pain points between them and brands - In partnership with **Influo**.

- **Chapter 3, Marketers**: a survey intended to listen to marketers' voice and create a picture of influencer marketing from their perspective – In partnership with the **Belgian Association of Marketing**.

profacts
Revealing factors for success.

Consumer survey
now in your hands

INFLUO

Influencer survey
September 2018

"B:A/M! BELGIAN ASSOCIATION OF MARKETING

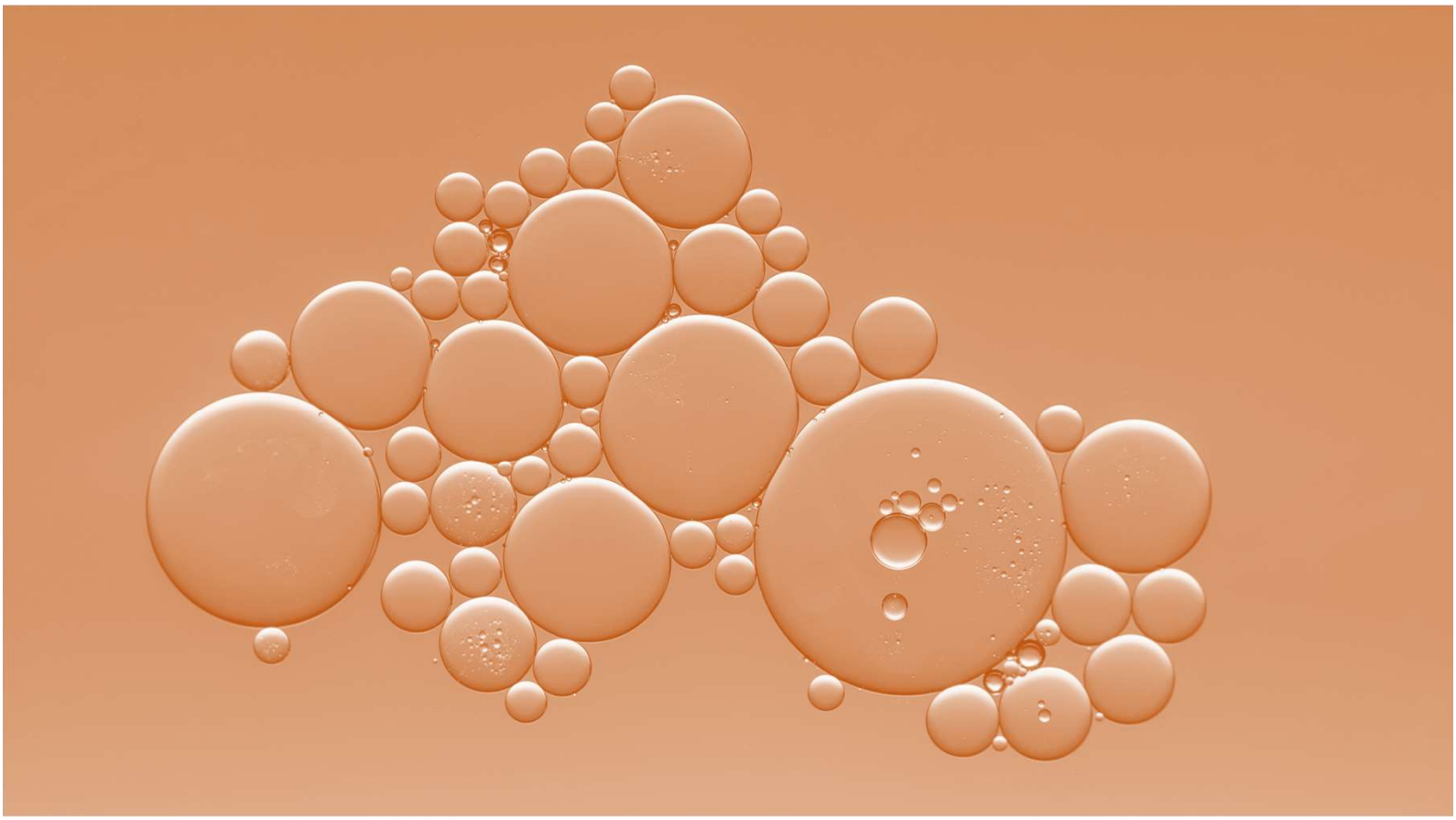
Marketer survey
October 2018

Chapter 1, Consumers

Definition

Influencer Marketing is the process of identifying, researching, engaging and supporting the people who create high-impact conversations with customers on brands, products or services.

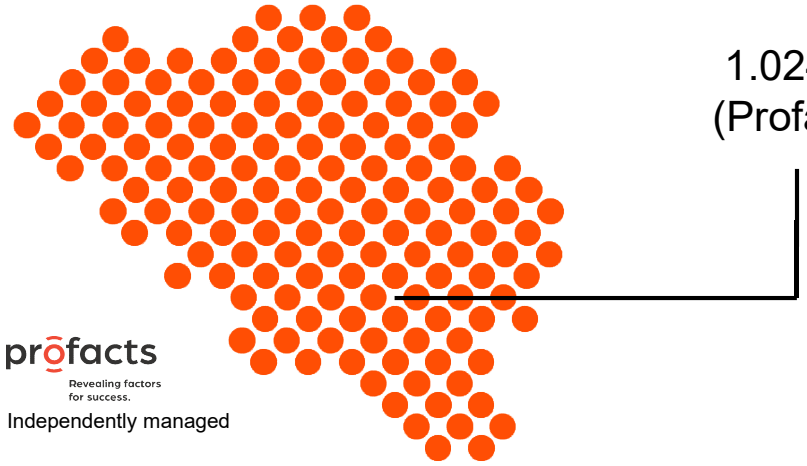
For the purpose of this study, we defined an Influencer by the following: *"An individual who can impact consumer behaviour by sharing information and opinion on his or hers blog, forums and social networks such as Instagram, Facebook, Snapchat, YouTube, etc."*

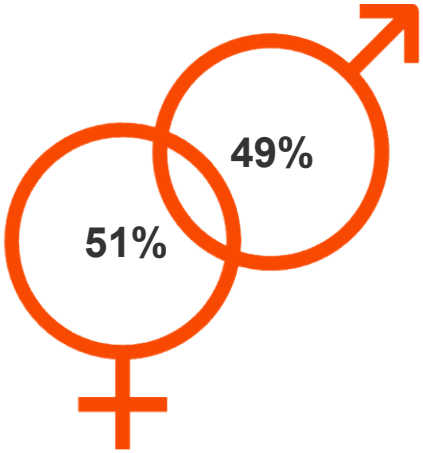


The panel

In order to analyse the Belgian population, Isobar partnered with Profacts and delegated the survey process to them. Independently, they performed the fieldwork and data collection.

1.024 Belgians aged between 16 and 65+ were consulted, offering a perfect panel and guaranteeing that the net sample is representative of people active on Social Media*.





Method
Online interviews
Profacts panel

Fieldwork
19/02/18 - 04/03/18

Age

16-18	19-24	25-34	35-44	45-54	55-64	65+
3%	9%	19%	20%	17%	21%	11%

**Taking the representative sample (gross sample) and filtering out those who are never active on any social media platforms, guarantees that the net sample is representative for the people who are active on social media platforms. Small weighting of gross sample based on gender, language and age. Unweighted base sizes are labelled as such in the paper.*

Three sections

The consumer survey has been designed in three parts.

First, we studied the **digital behaviour** of the Belgian population. This helped assess the amount of users on social networks, the frequency of usage based on age, family status, gender, etc.

With the second pillar we analysed the **"following" behaviour** of Belgian people to understand who they follow, why they decide to follow influencers and the kind of topics and formats that are the most appealing to them.

The last pillar is clearly focused on the **impact** that influencer marketing has in terms of brand perception, brand lift and purchase intent.

A

Social Media behaviour

How active are consumers on social media? What are their favourite platforms? What are their online activities? etc.

B

“Following” behaviour

Who do they follow? Why do they follow influencers? What are their favourite topics?

C

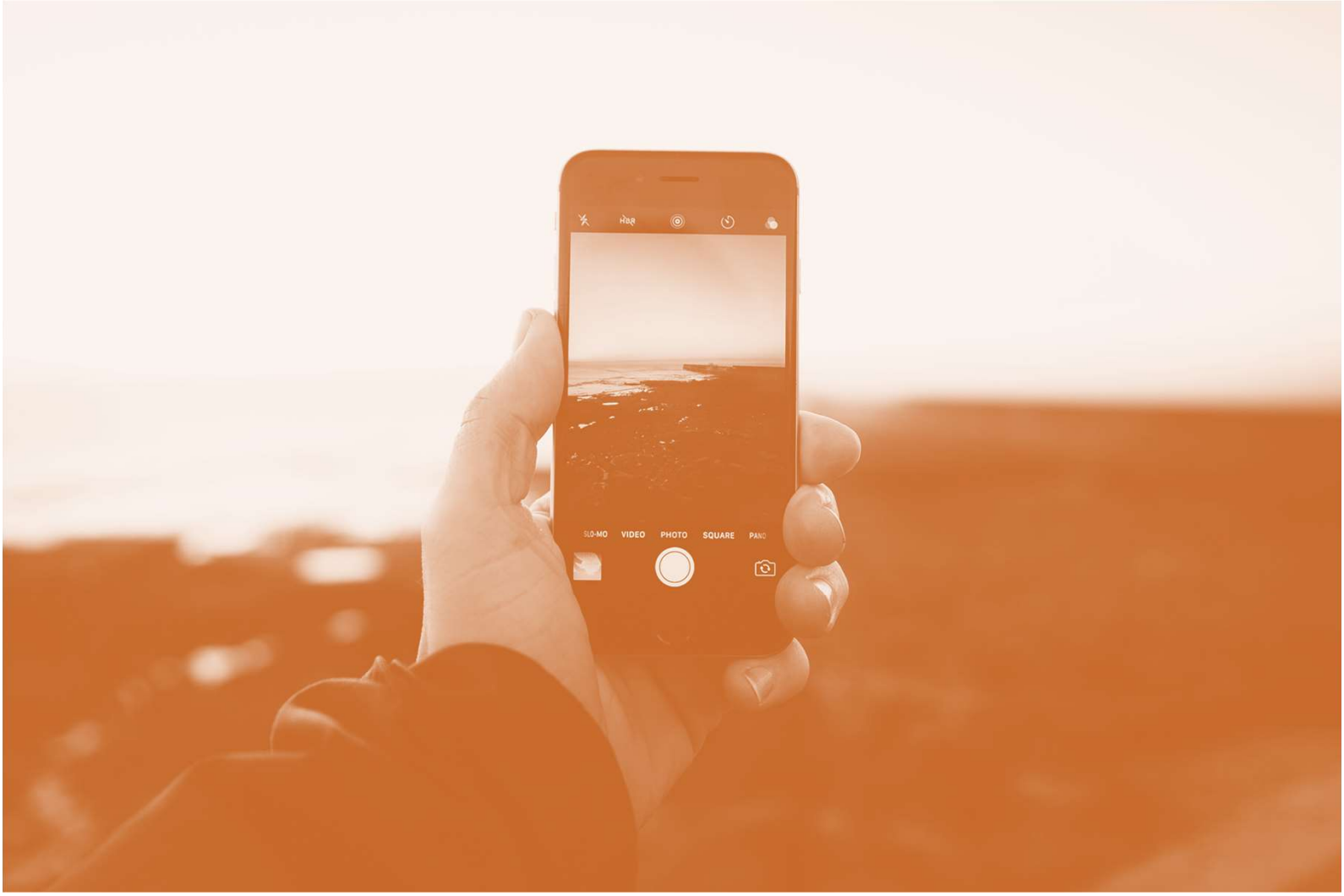
Impact of Influencer marketing

Does it impact the perception of the brand? Can we aim for sales uplift?

A - Social Media behaviour

In this first part, we take a closer look at the online consumption of the Belgian population between 16 and 66 years old. What are their preferred networks, their frequency of usage and their global social media behaviour?

Are there differences between the northern and southern part of the country? Does gender impact media consumption?



Social Media usage

The survey was also the perfect occasion to picture our market from an independent point of view, as opposed to data published by Social Media platforms. You will find, throughout the following pages, a holistic view of the Belgian landscape.

Starting with general numbers on the total population to set the scene, highlighting the fact (if needed) that our market has matured a lot the past few years. Indeed, we can observe a strong increase in heavy and medium users (defined here below).

Heavy users (38%)

On a weekly basis, active several days on a minimum of 3 platforms

Women	**57%**
Men	**43%**
16 - 34	**58%**
35 - 54	**29%**
55+	**13%**

Medium users (57%)

On a monthly basis, regularly active on different platforms

Women	**48%**
Men	**52%**
16 - 34	**22%**
35 - 54	**46%**
55+	**33%**

Light users (4%)

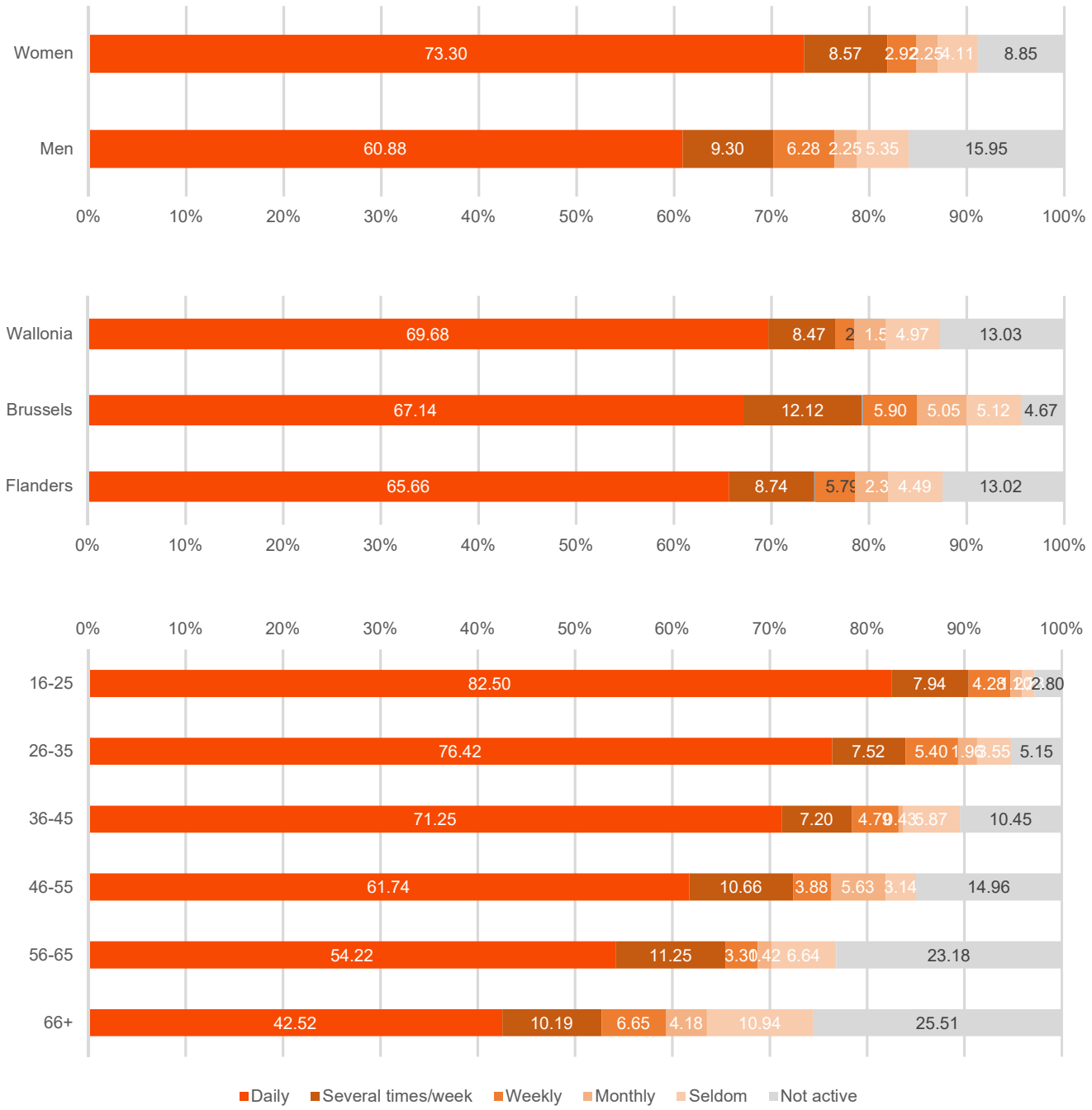
On a monthly basis, rarely active on any platforms

Women	**42%**
Men	**58%**
16 - 34	**02%**
35 - 54	**43%**
55+	**55%**

Facebook

On total BE online population

n=1.063



isobar

Facebook

It comes as no surprise that Facebook is the most used platform (88%) within the total online population. Most of them use Facebook daily, A general fact regardless of gender, age or region. The platform is more popular among young people (16-24), but this is due to the fact that nearly all young people are heavy Social Media users.

The frequency of usage is geographically similar. In terms of gender, 73% of women use Facebook at least once a day while this is only the case for 60,8% of men.

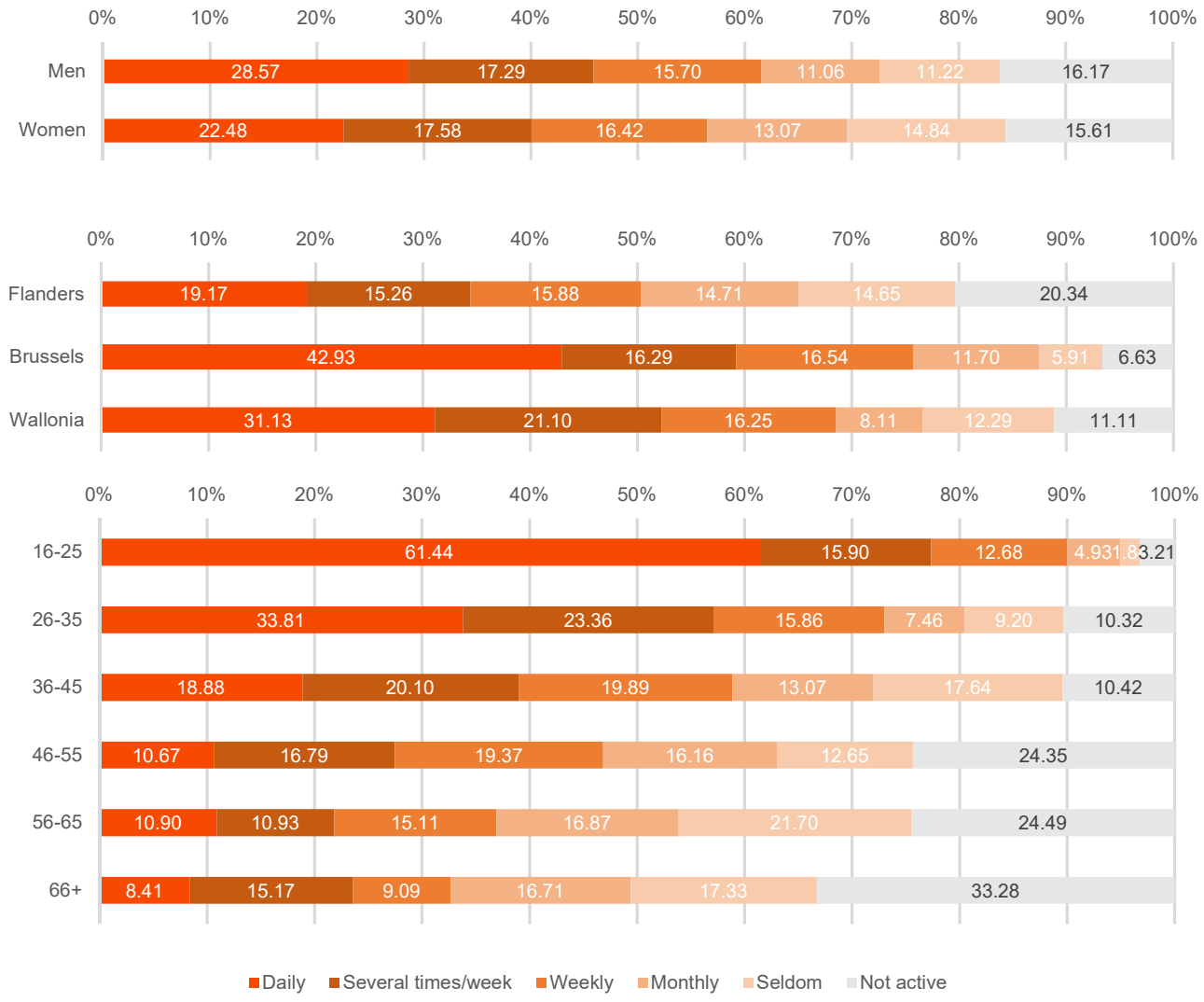
82% of the category with people aged 16-25 use the platform at least daily and this decreases to 42% for people older than 66.

Facebook is clearly the most used platform in terms of frequency and total amount of accounts. The majority of these are clearly linked to people older than 25 who focus their Social Media usage on Facebook and YouTube.

YouTube

On total BE online population

n=1.063



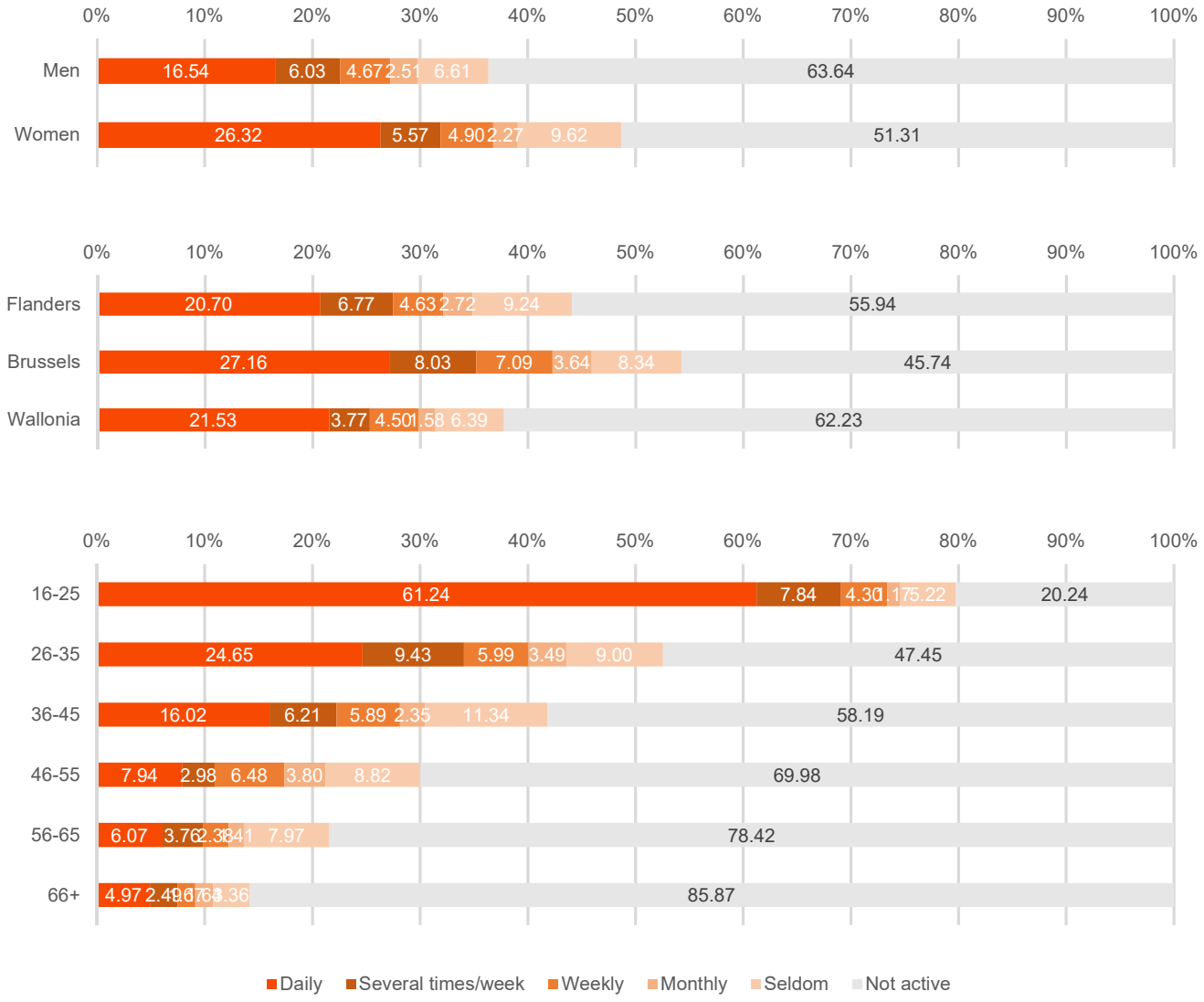
Even if the amount of monthly active users is nearly the same as Facebook, consumption on YouTube is quite different. Intense usage of YouTube is evident for people under 25. Daily usage drops quite quickly as soon as we look at 26+ (33%) and 36+ (18%). For 45+, daily usage is around 10%.

Looking at gender, usage is slightly greater for men than women.

Instagram

On total BE online population

n=1.063



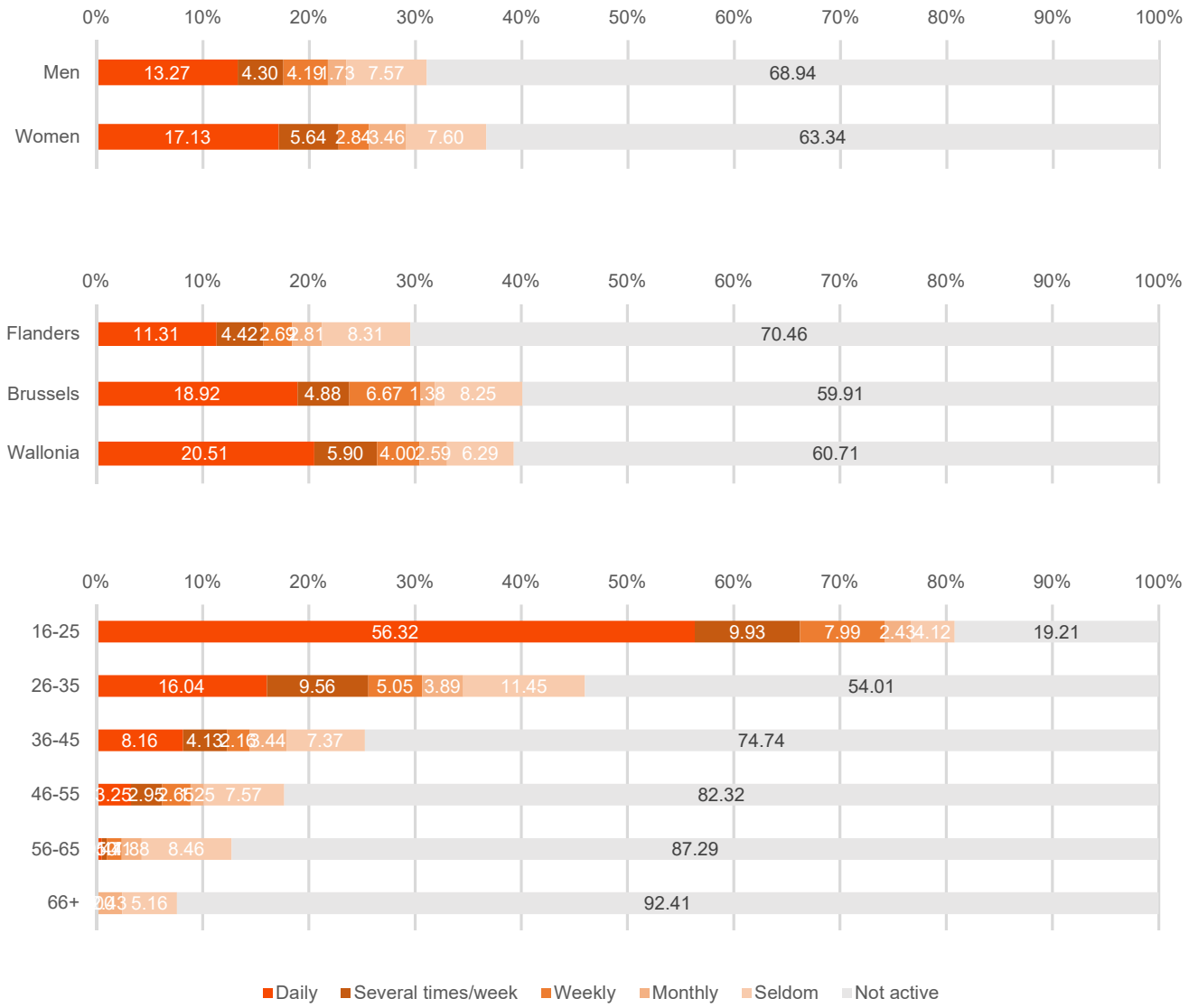
Instagram covers half the female population in terms of users, the skew is reinforced by the fact that 63% of men don't use the platform. Instagram is highly popular among young people (under 25), with a noticeable drop from 26+ onwards.

Daily usage is more than 61% for young people (16-25) but decreases to 25% for people aged between 26-35.

Snapchat

On total BE online population

n=1.063

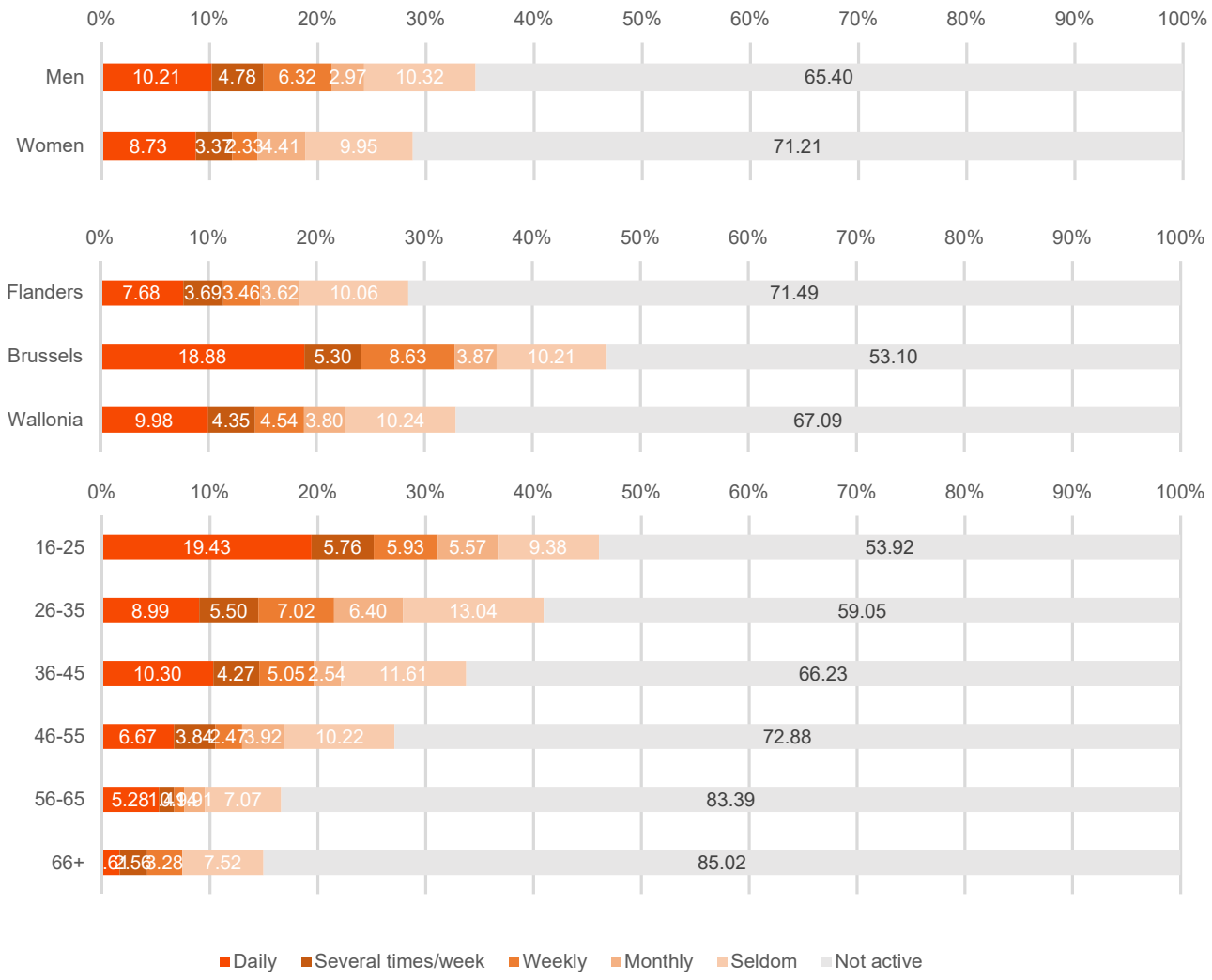


At first sight, Snapchat seems to be used less, compared to Facebook or YouTube. However with a focus on specific segments, we clearly see that young people (16-25) are massively using the platform (up 80%), with more than 56% using it on a daily basis.

Twitter

On total BE online population

n=1.063



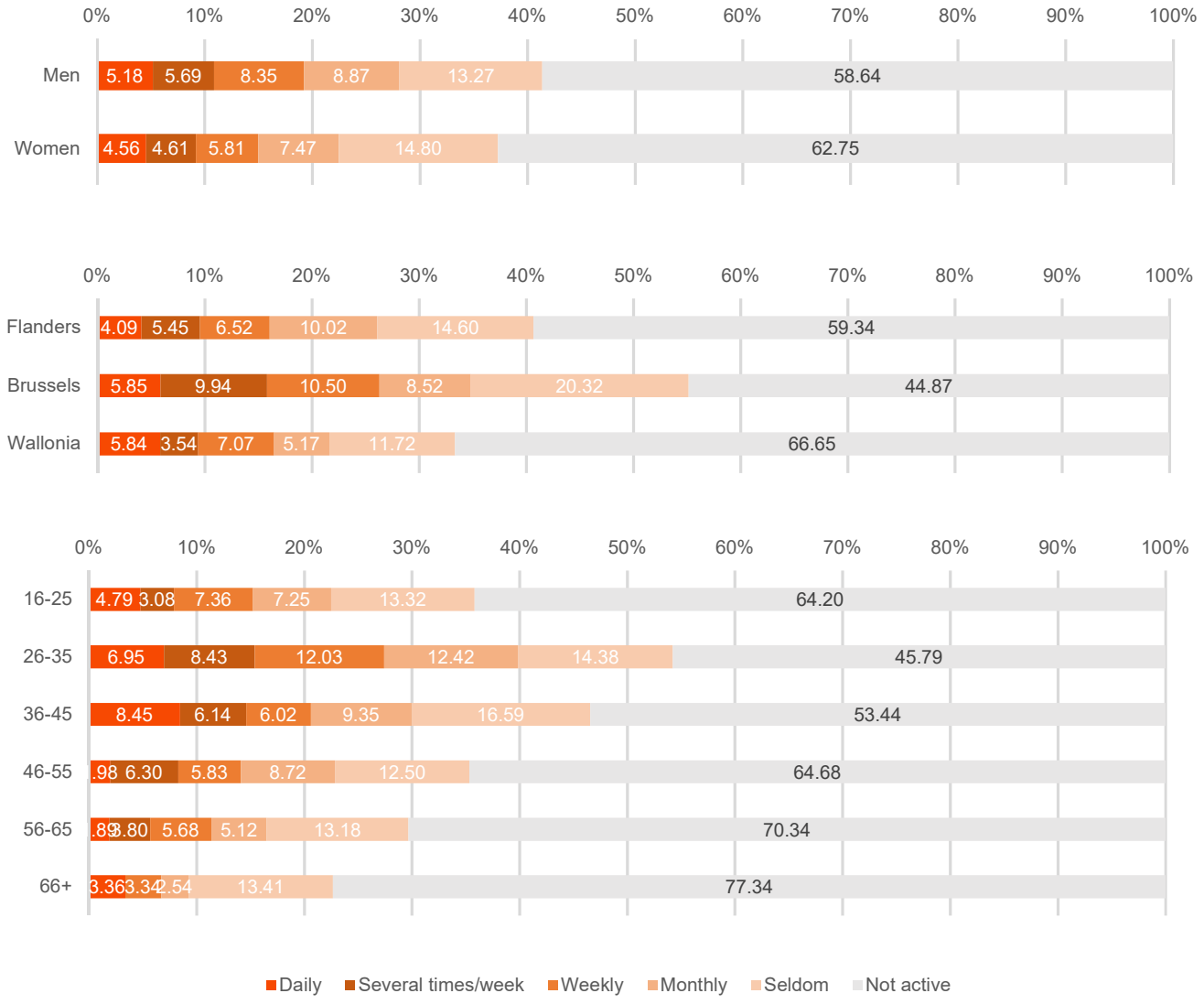
Overall its usage is relatively light, with a better repartition between ages. As users explain, Twitter is less of a social network and more of a news platform. It seems that this platform has a dedicated audience that stays connected and loyal.

Twitter is mostly used by young people (16-25), and people living in Brussels. 50% of the population do not use this platform.

LinkedIn

On total BE online population

n=1.063



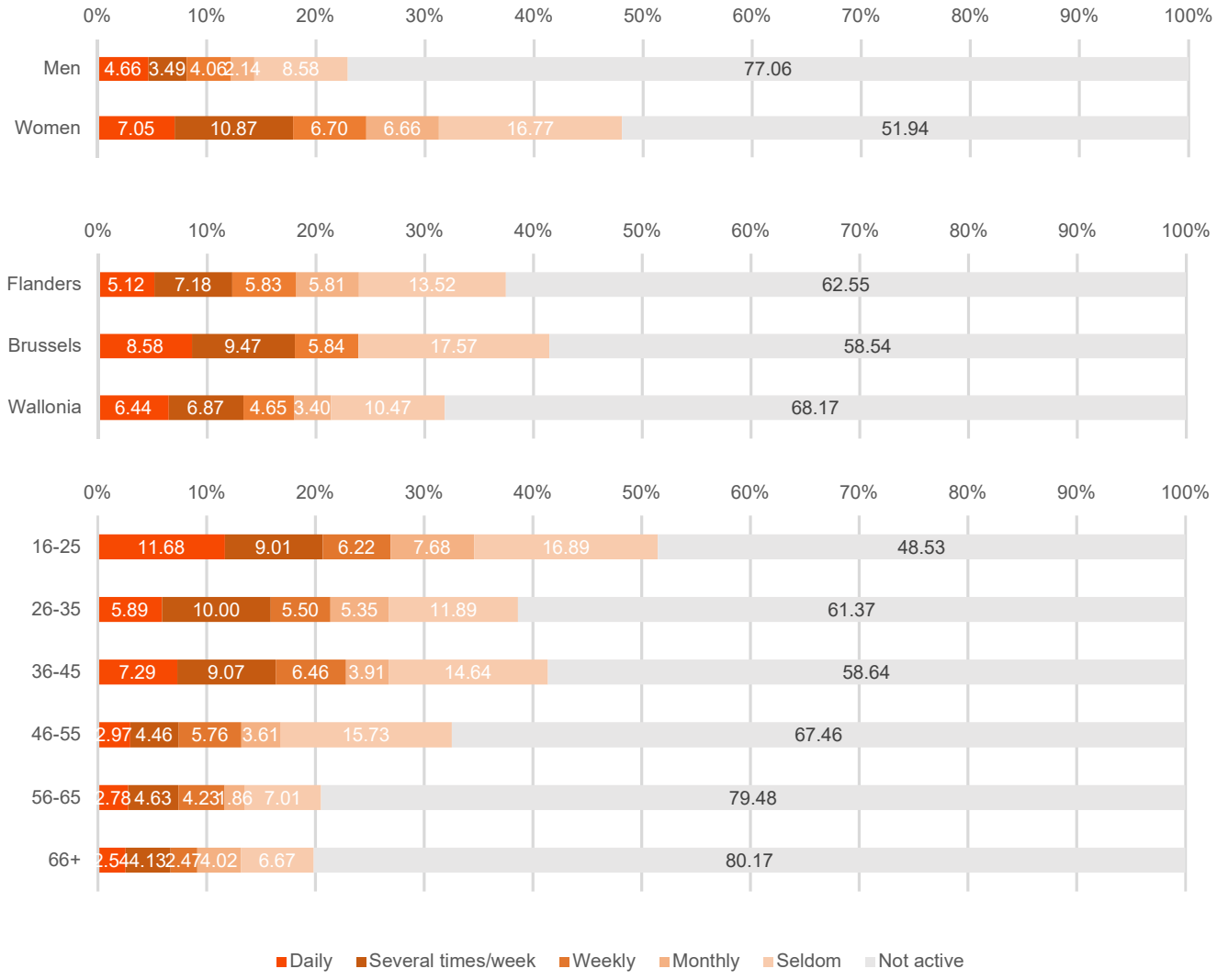
Naturally, the core audience of LinkedIn is “active people”. People between 26 and 35 years old are the most active, and there’s a clear correlation between the people’s career and their usage.

Up to 65 years old the platform usage stays above 30%, even though the frequency is lower overall than other networks.

Pinterest

On total BE online population

n=1.063



Pinterest skew heavily on Women with 49% of them using it, compared to 23% of Men. The heaviest users are young people, but this network remains strong up to 55.

Looking at frequency, Pinterest seems to be a « slow » network: only 20% of people under 45 use it weekly.

Preferred platforms, in general

1		**54%**	More popular among **medium users**: 60%
2		**15%**	
3		**9%**	More popular among **heavy users**: 17%
			Also popular among **heavy users**: 10%

Naturally, when looking closer at audience behavior and preferences, we discover niches that can be exploited.

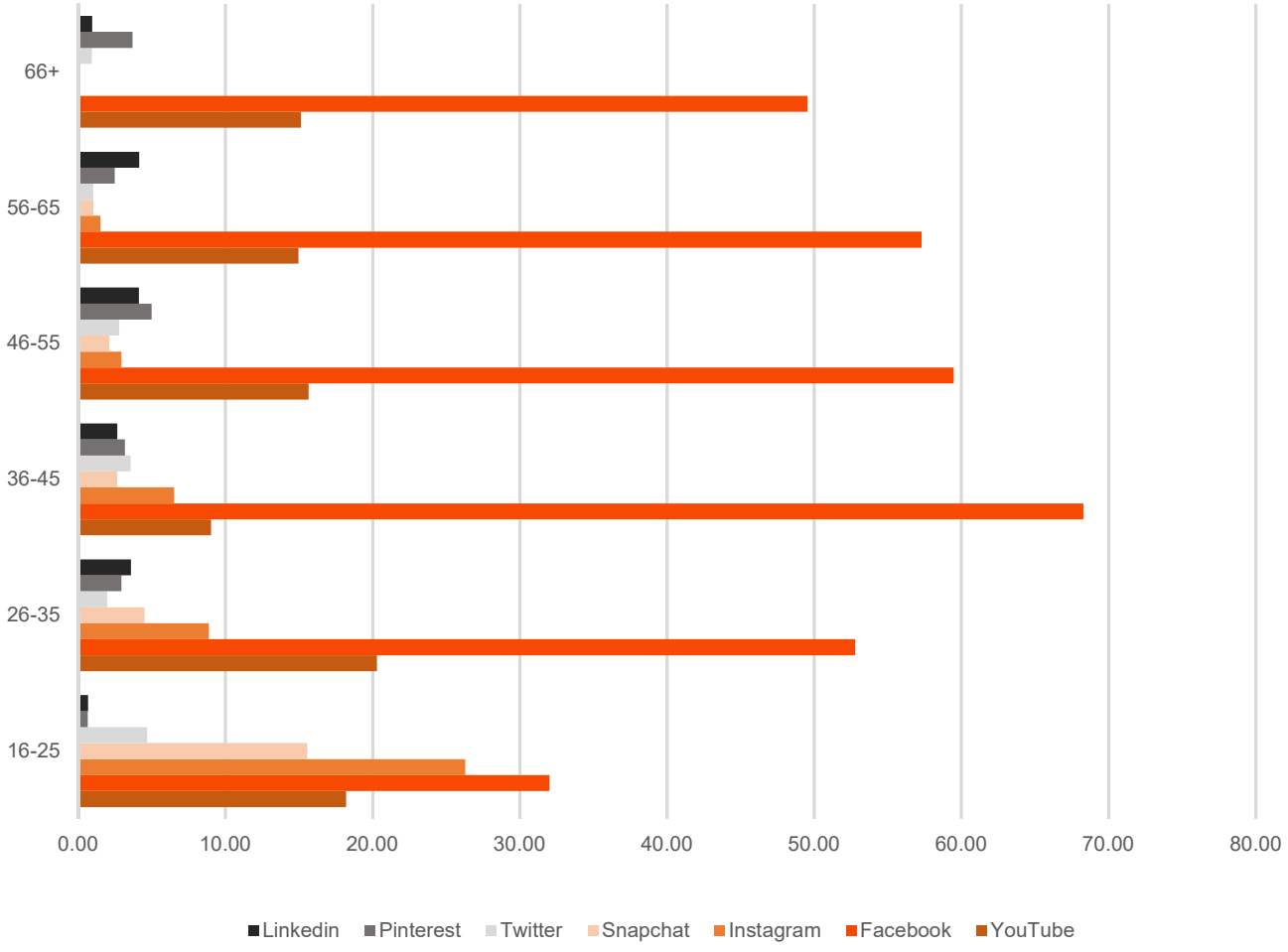
Heavy users are active on multiple platforms and this reduces the relative strength of Facebook on their segment, but frequency of usage remains high.

Snapchat has particular usage linked to its very young audience. As a result, it is the preferred platform of 10% of the heavy users and 20% of people under the age of 25.

Preferred platforms, by age

On total BE online population, in %

n=1.063



The purpose of this chart is to serve as a global blueprint, platforms versus age brackets. As illustrated in the graph, Facebook clearly leads the pack, including on older segments.

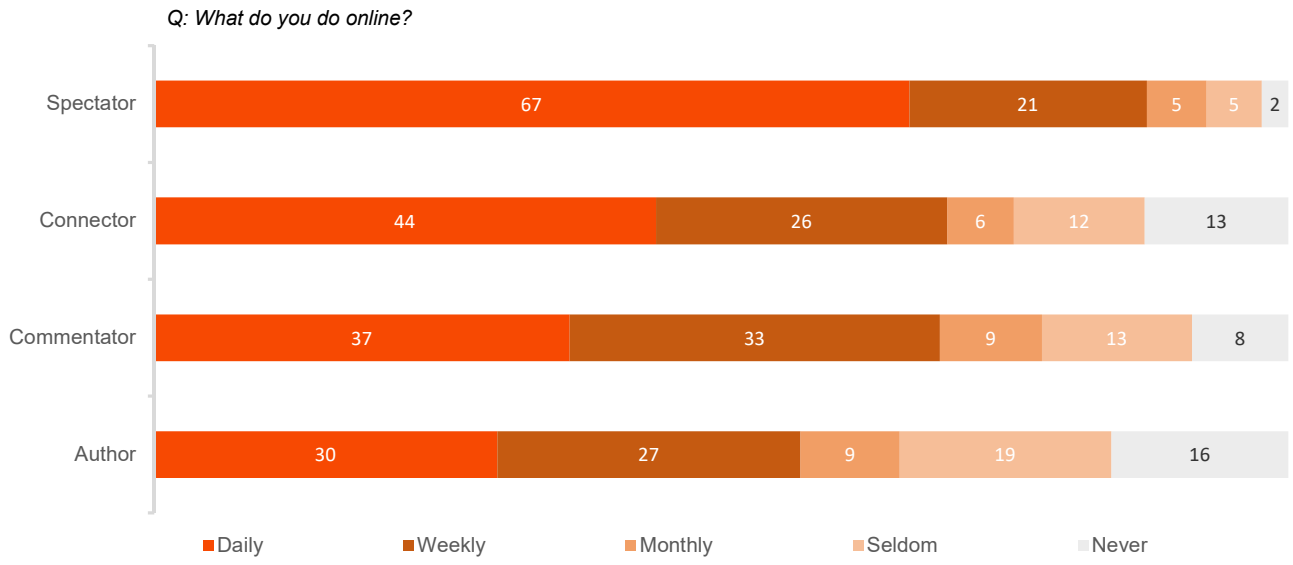
The second most used platform is YouTube, again more popular for older age groups.

There's clearly a younger audience on Instagram and Snapchat, while the same users seems to logically neglect LinkedIn.

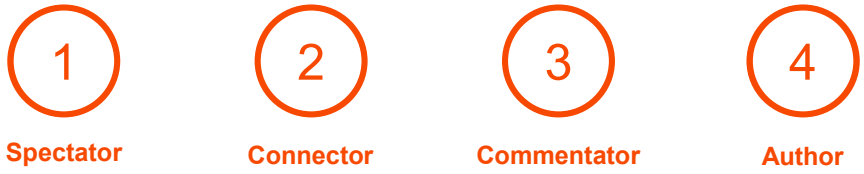
Social Media activities

On total BE online population, in %

n=1.063



While heavy users' online behaviour is more pronounced (i.e., higher scores), all segments do show the same pattern: the Social Media behaviour of the Belgian population is mainly passive (spectator), reducing as personal commitment in producing and managing content increases.



Due to the latest developments of messaging systems, connecting people and direct messaging is the second most common usage of social media. 70% of Belgian people comment on social media posts at least once a week, while 57% post something themselves at the same frequency.

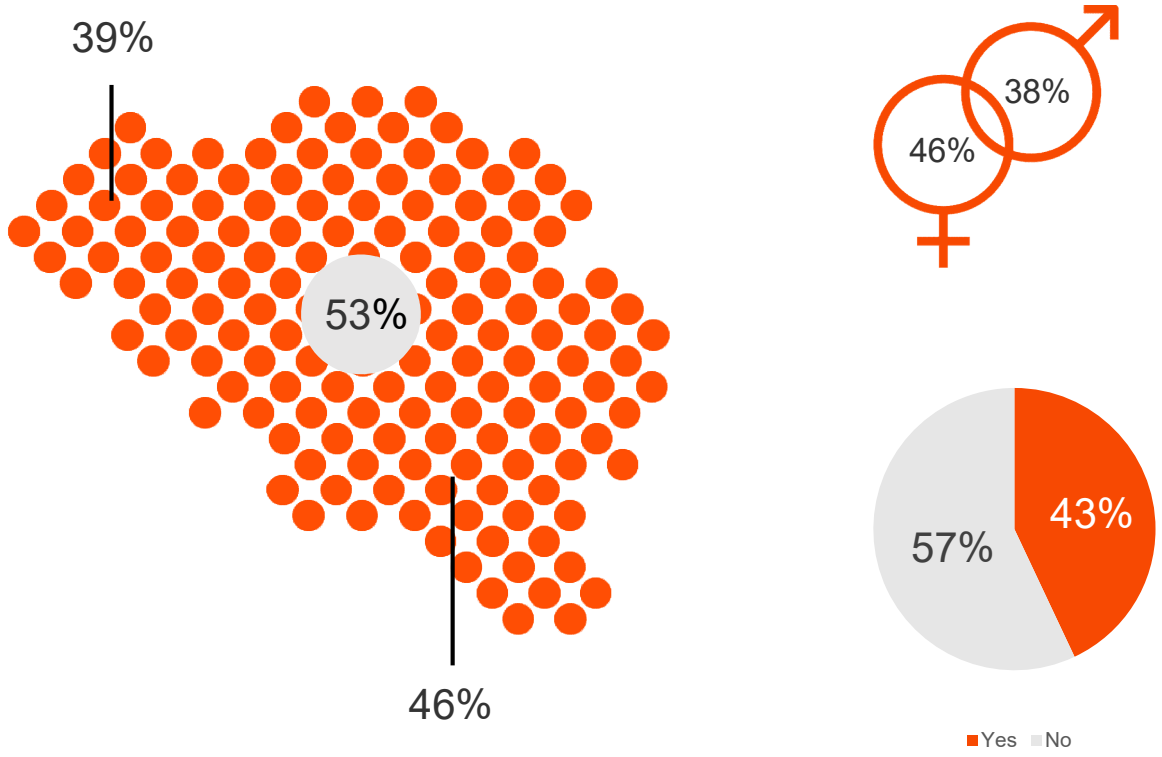
B - “Following” behaviour

In this second chapter, we will learn more about how Belgian people follow their friends or people they don’t know (i.e. Influencers).

Who do they follow? What kind of topic are they interested in? How many people do they follow that they don’t know and why?

“Following” behaviour

Q: Do you follow people on social media that you do not personally know?



Base: Total sample (n =1.063)

Women and young people especially are follow people that they personally don’t know on social media.

43% of users in Belgium follow people that they do not know personally on social media. Taking into account an online population of 10 million people, this represents a potential audience of 4,3 million people.

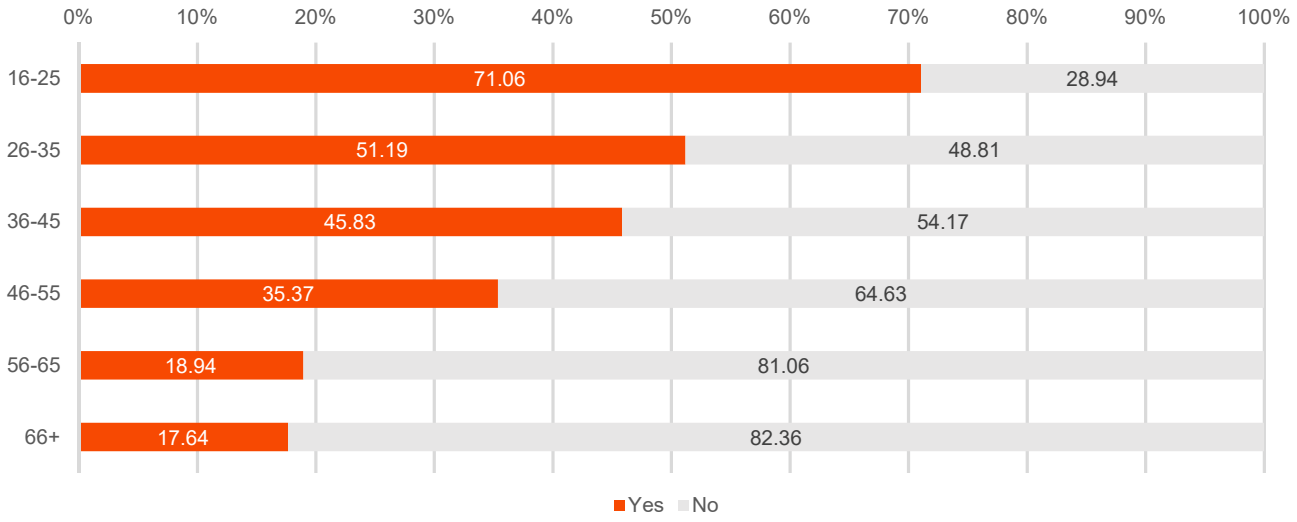
The percentage is higher in Brussels (53%) than Wallonia (46%) and in Flanders (39%). This trend reflects a general perception: the influencer phenomenon seems more prominent in Brussels than the rest of the country.

“Following” behaviour by age

On “Influencers followers” population, in %

n=426

Q: Do you follow people on Social Media that you do not personally know?



When we look closer at the behaviour of different generations, we see that more than 71% of young people follow profiles they do not personally know.

This trend decreases for older people, but we can see that Influencers are generally followed by more than 40% of 45+ years old.

The same trend is 51% for 26-35 year olds and 46% for those aged 36-45, meaning that there is a real opportunity to communicate to older audiences via Influencers.

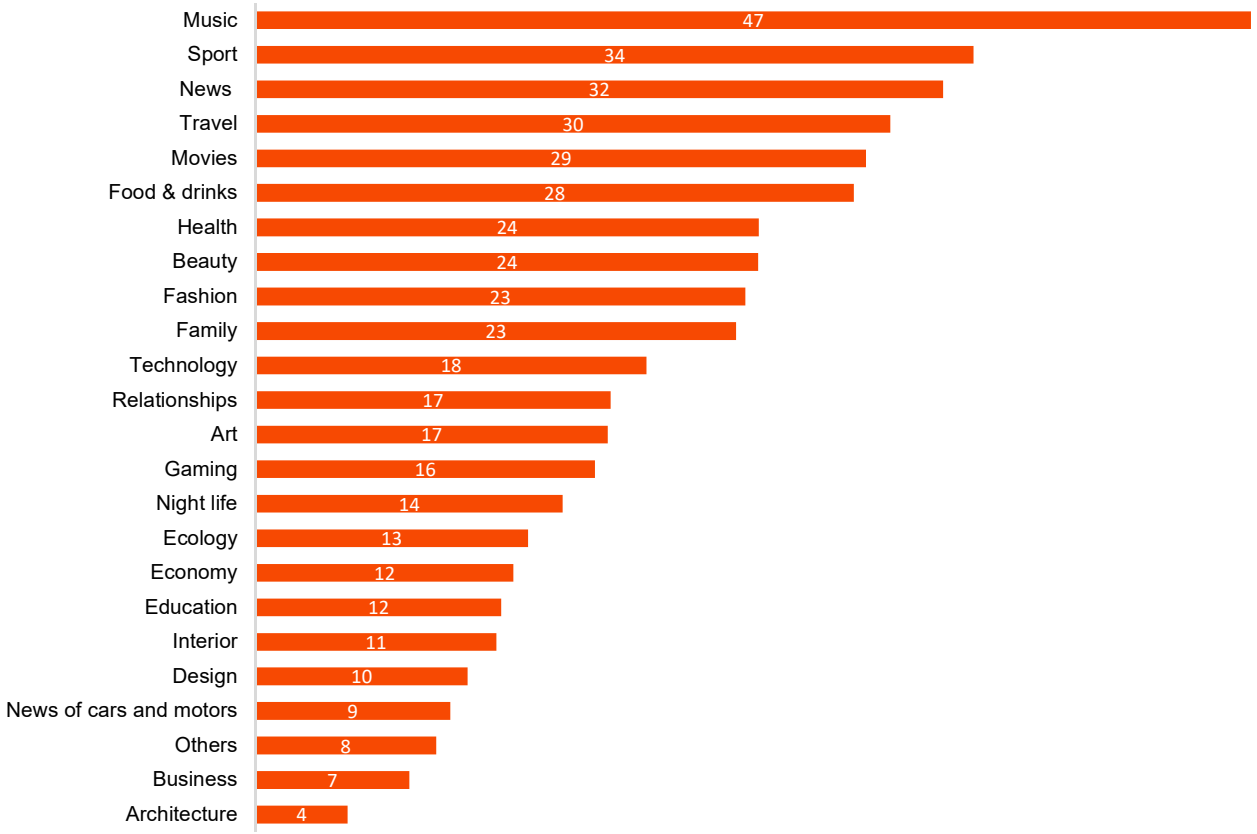
When we look at the age repartition of Influencers (extracted from our Influencers panel) we see that more than 80% of them are younger than 35.

Following an Influencer for what?

On “Influencers followers” population, in %

n=426

Q : for which topic do you follow Influencers?



With more than 47%, music is clearly the most important topic for which people are following influencers. The biggest challenge will be to detect and define the music style that fits perfectly with your audience.

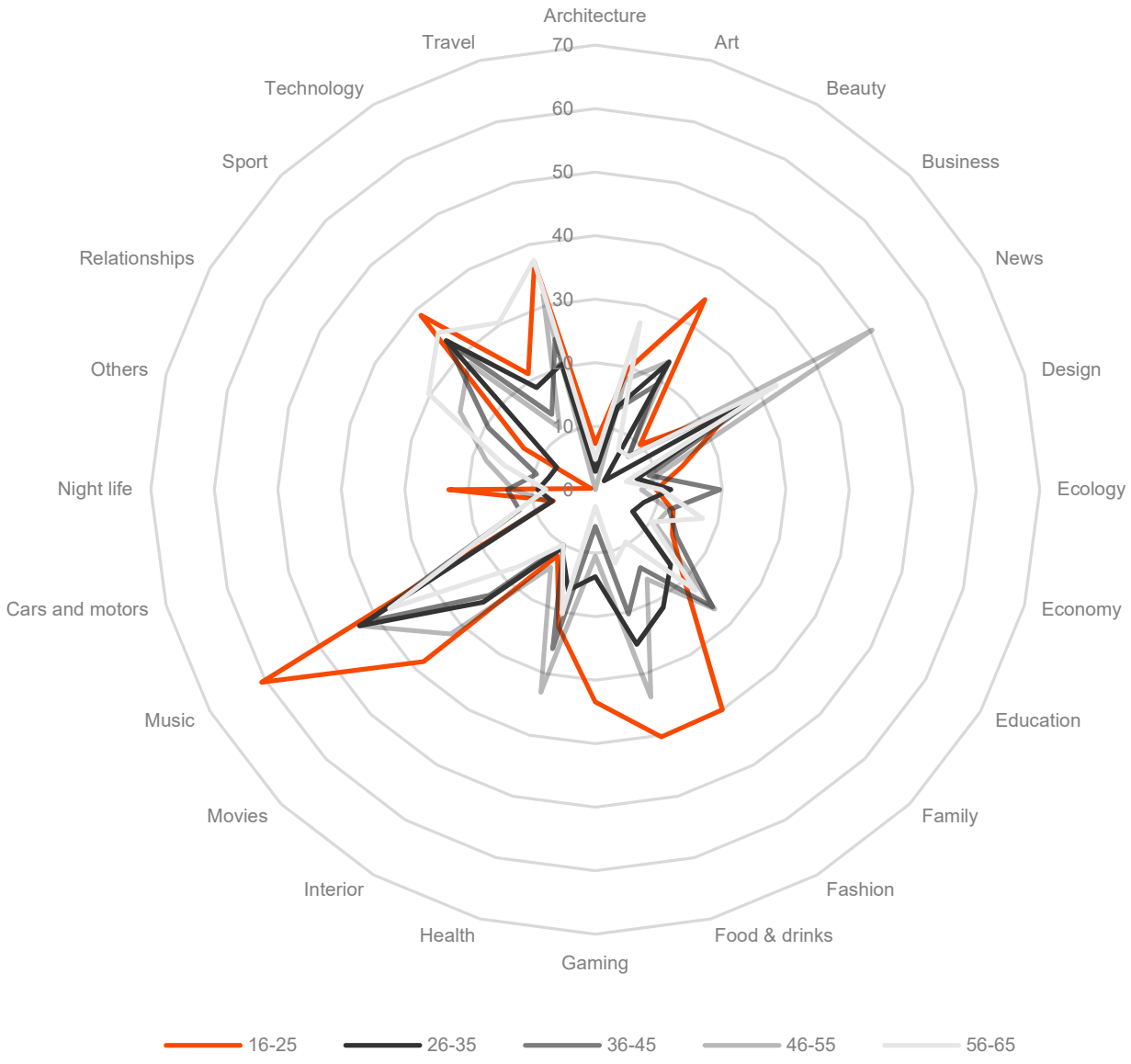
Lined up behind, scoring around 30% are also some topics worth exploring, such as sport, news and travel. Health, beauty and fashion are around 24%. This seems low, but these topics are clearly impacted by gender.

Cars and motors are very low. It is still to be verified if this is mainly linked to a lack of influencers on this topic or to a lack of interest.

Interests impacted by age

On “Influencers followers” population, in %

n=426

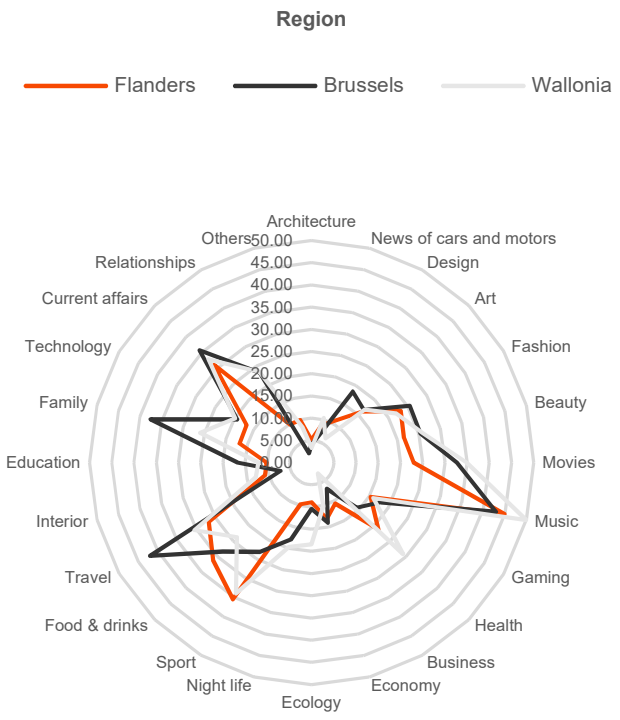


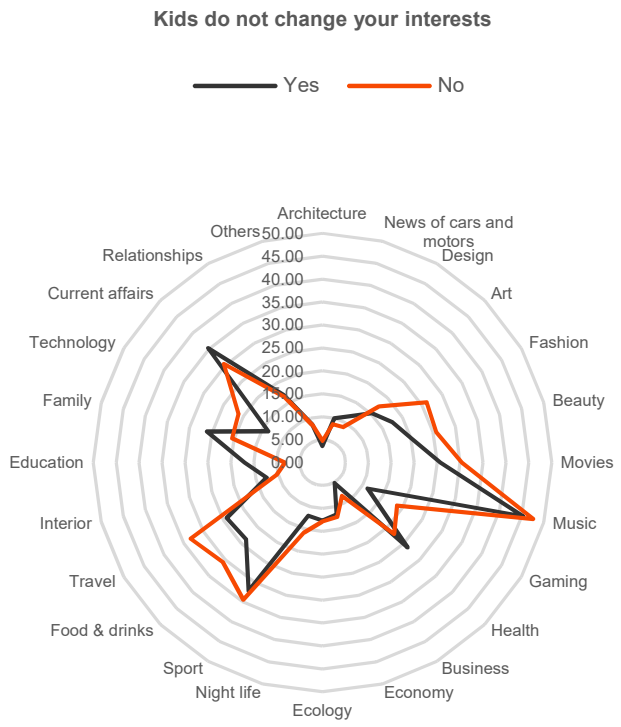
Interests are logically impacted when sorting the results by age brackets; with music, food / drinks and fashion having more importance for younger audiences, and information scoring better on older groups.

Interests not impacted by family or region

On “Influencers followers” population, in %

n=426





Having kids or your place of living does not change the game. Both graphs are quite similar.

We can see on the right chart that children in the household do not change parents’ favourite topics. Meaning that “following” habits also remain something personal, and focused on one’s individual interests. The only exception being family topics going up and travel / fashion ones slightly going down. The difference being relatively small.

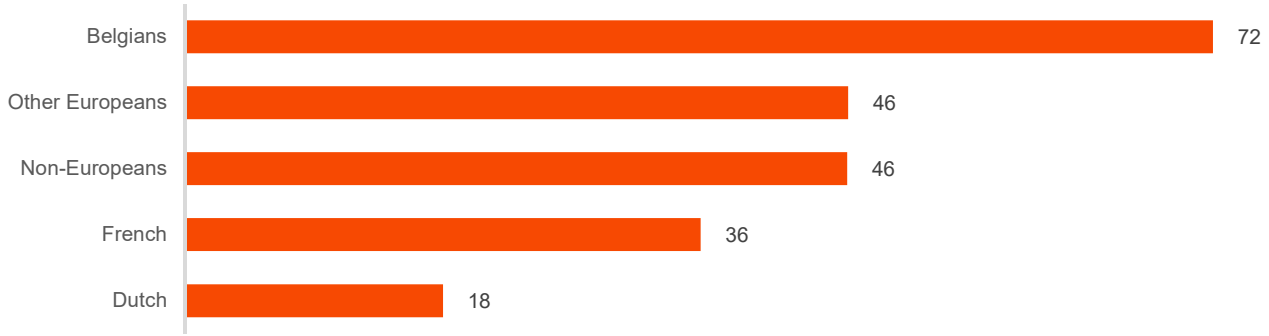
Music, nightlife and travel are the topics that are almost equally followed from a regional perspective, making them national points of interest.

Influencer's nationality

On "Influencers followers" population, in %

n=426

Q: What is the nationality of the people you follow and do not personally know?



Local talents and their content are of major importance, as 72% of Belgian surfers are more interested in following Belgian Influencers.

We can also highlight the fact that young people (and heavy users as well) are following more non-European Influencers than their older counterpart.

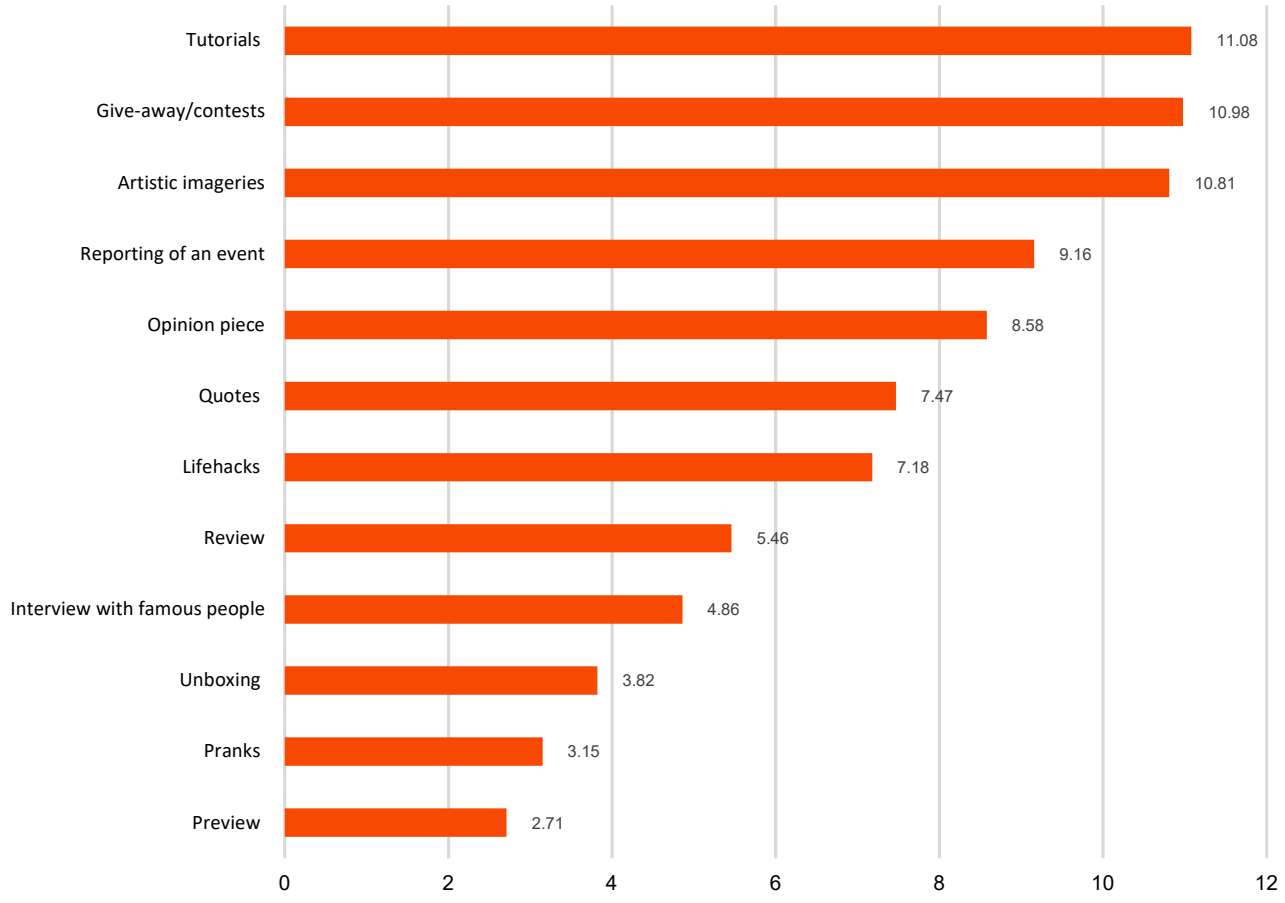
Another observation worth noting is the fact that that French talents seems to have quite an impact in Brussels and Wallonia, while the impact of Netherlands in Flanders is less important. This can be compared to the overflow observed on more traditional content platforms.

Type of content

On “Influencers followers” population, in %

n=426

Q: What kind of posts of an influencer do you watch the most?



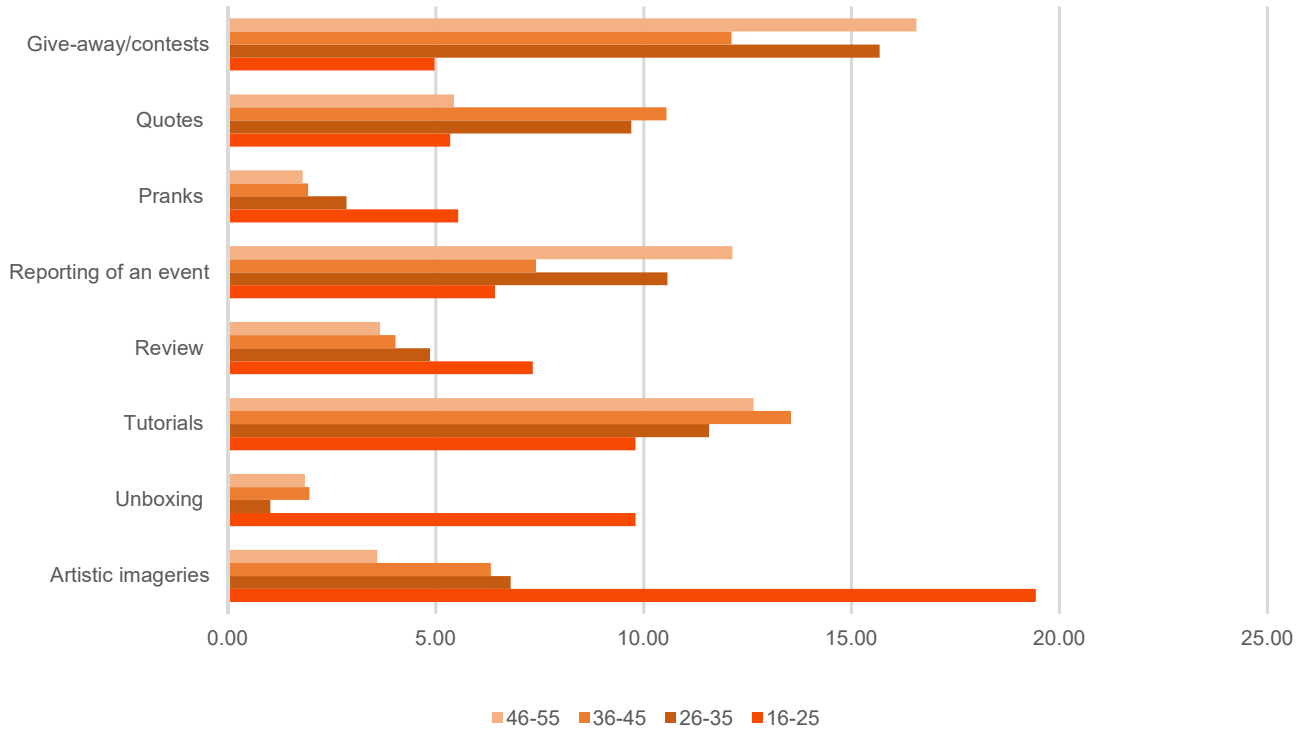
Followers are globally interested in tutorials, giveaways and contests as well as in artistic imageries; while pranks, unboxing and reviews score the lowest.

This type of broad view is obviously limitative to draw conclusions for brands with narrowed audiences. In those cases, going deeper in the results is necessary to find the right angle.

Type of content by age

On “Influencers followers” population, in %

n=426



When adding an age layer on preferred type of content, things become more interesting.

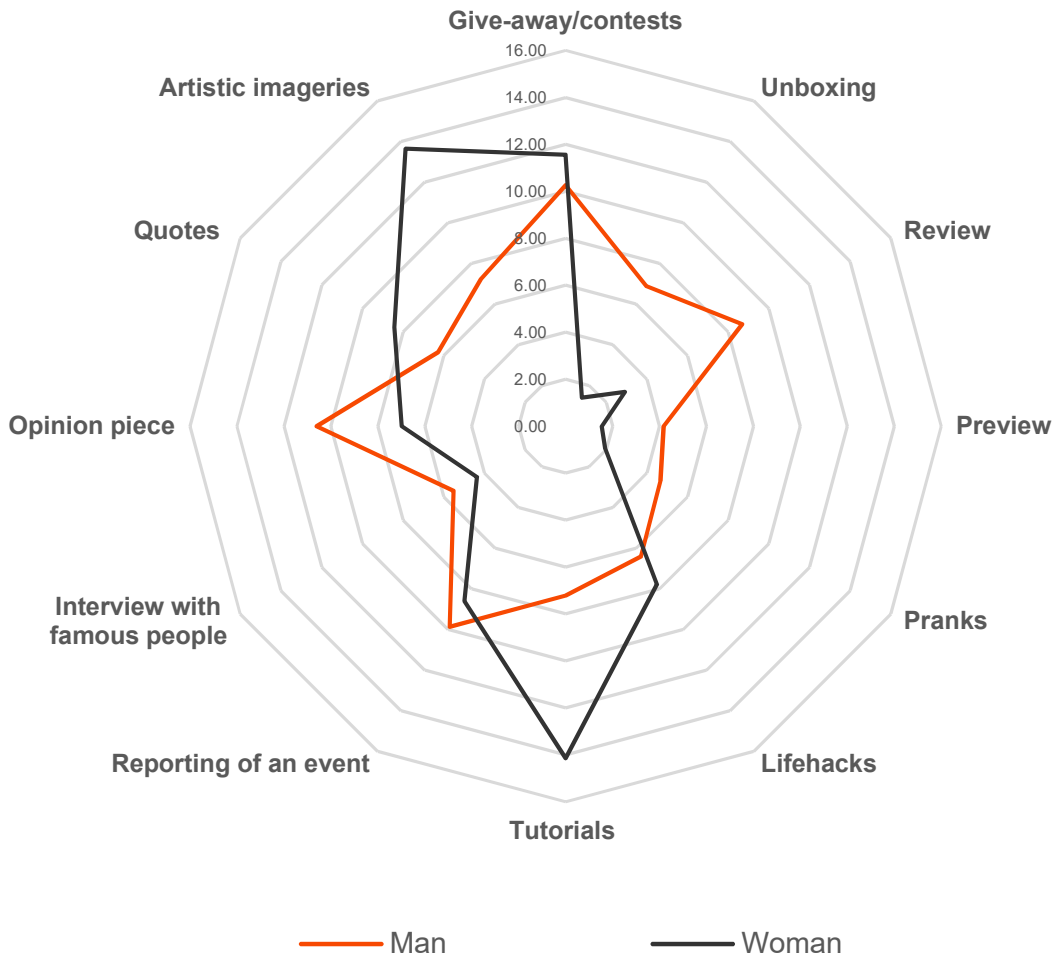
Here we selected a few types of content and measured their interest by age categories. We noticed that artistic imageries are more appreciated by young people (20%), but they dropdown drastically as soon as people are older than 25 (5%).

With an average of 12%, tutorials seem to score high across all brackets, even increasing with age. Contests and giveaways are less interesting for younger people, and they quite appreciate unboxing.

Type of content by age and gender

On “Influencers followers” population, in %

n=426



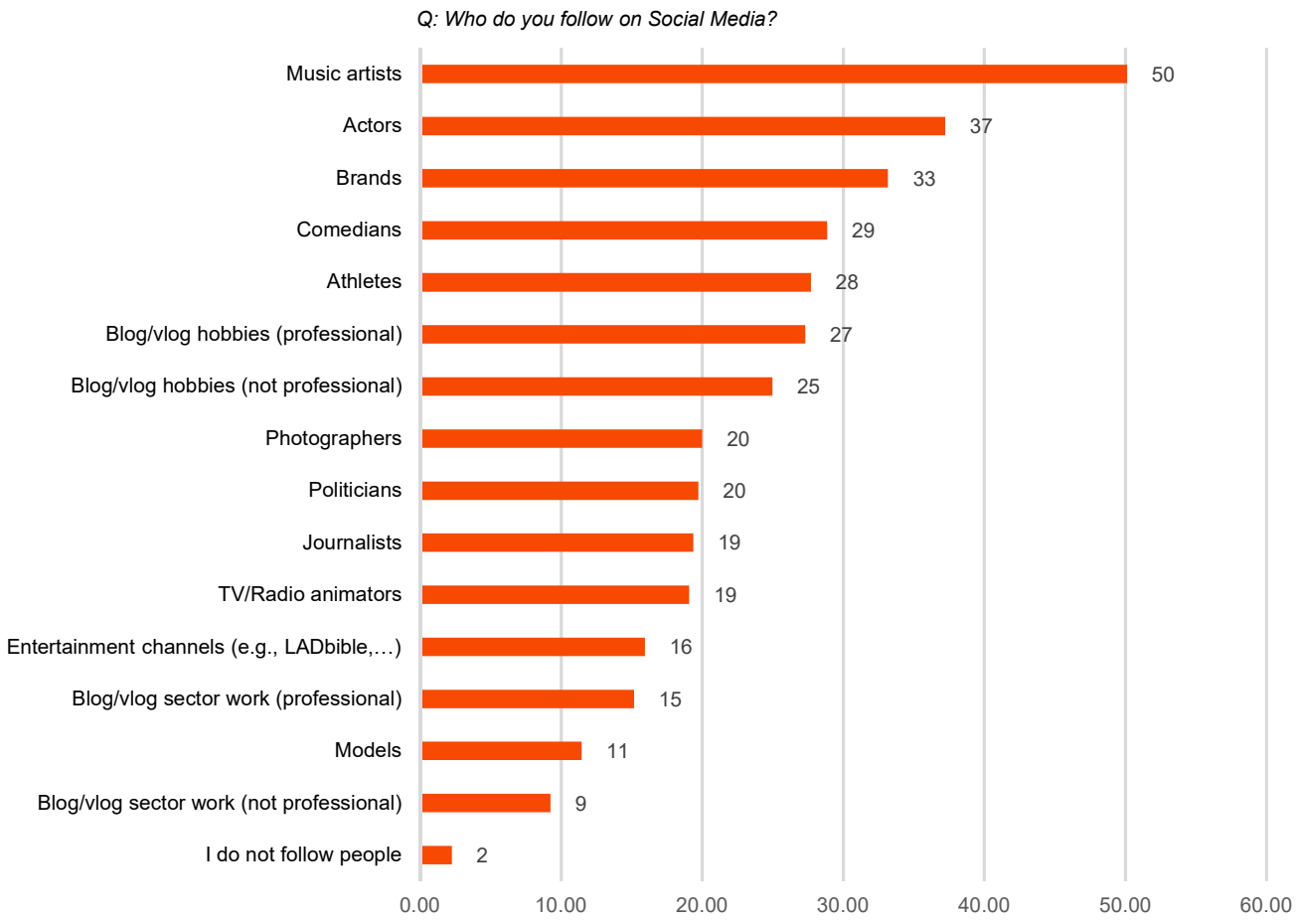
If we analyse the type of content by gender, men are clearly more attracted to opinions, reviews, unboxings and previews.

Women score higher on tutorials, artistic imageries and quotes. And on a side note, we can observe that having kids doubles the interest in tutorials ☺

Who do they follow

On “Influencers followers” population, in %

n=426



People mainly follow friends, family and acquaintances; but when it comes to people they do not know, the highest results are music artists (50%) and actors (37%).

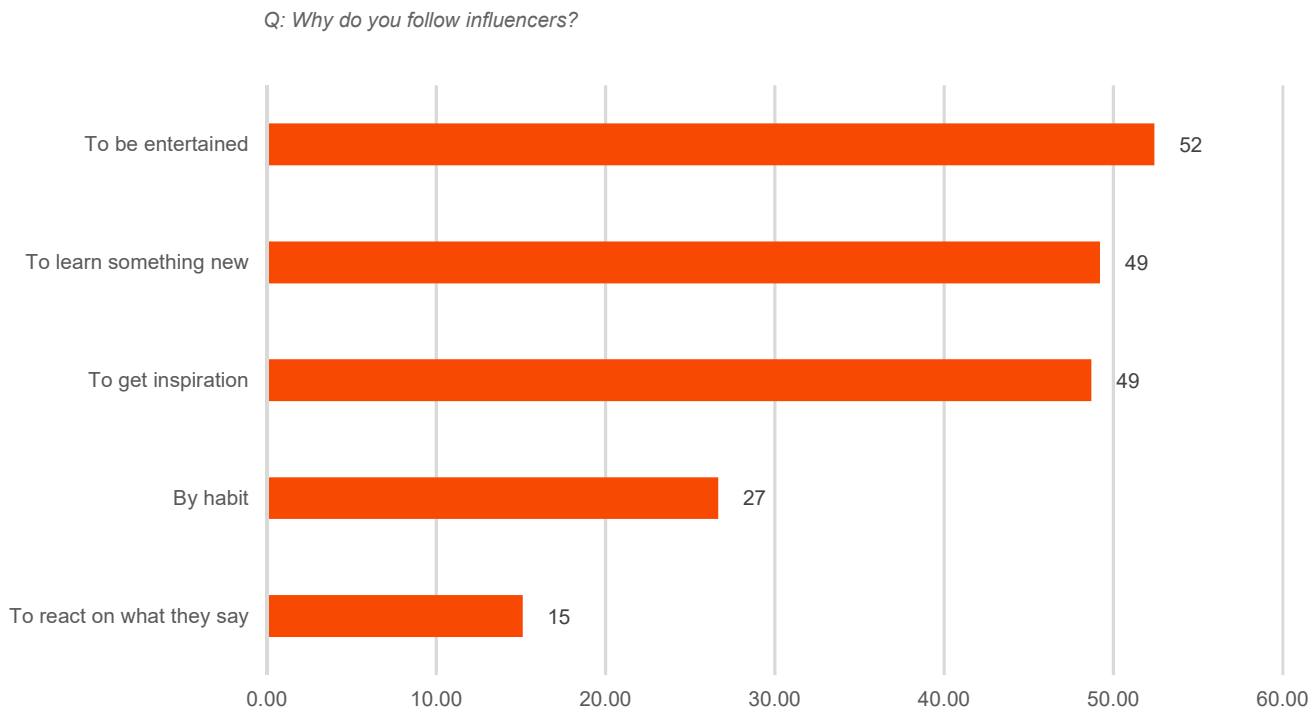
It is worth noting that brands come in third place, reinforcing the notion that their content is requested by consumers.

Bloggers and vloggers producing content about hobbies are followed by 25% of the population, with a 10% drop for professional content. Politicians, journalists and TV hosts all score around 20%.

Reasons to follow Influencers

On “Influencers followers” population, in %

n=426



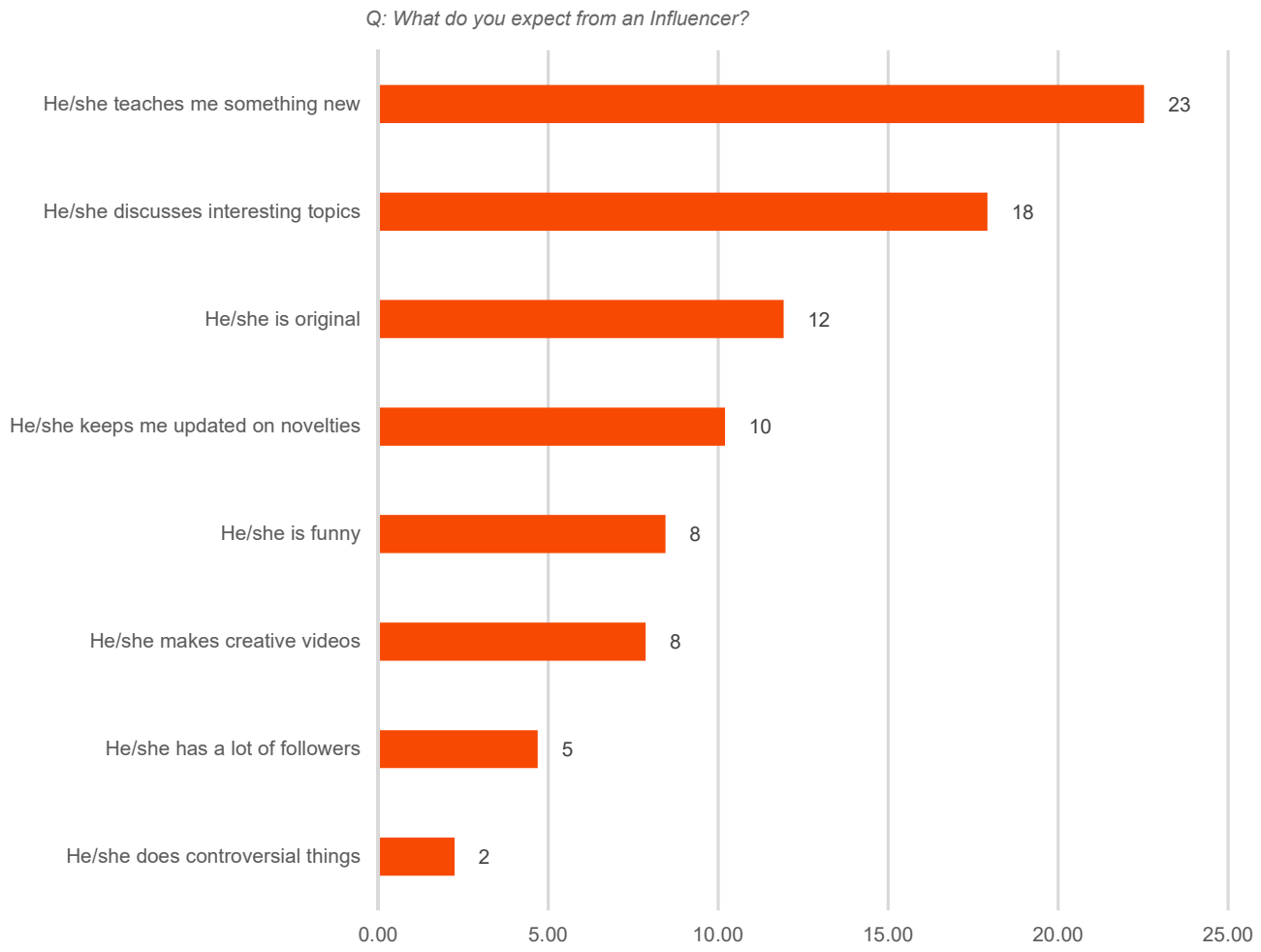
From a general point of view, people follow Influencers to be entertained, informed and inspired; rather than actively discuss, share or comment on their work. This notion vary when filtering the results by age, as it seems that the intent of reacting scores higher on older age groups.

'Learn & discover‘ in an entertaining way (thus infusing the content with Influencers’ universe) is certainly the most actionable pillar a brand can use to create content that matters, with 49% of people waiting for this.

What's expected from Influencers?

On "Influencers followers" population, in %

n=426



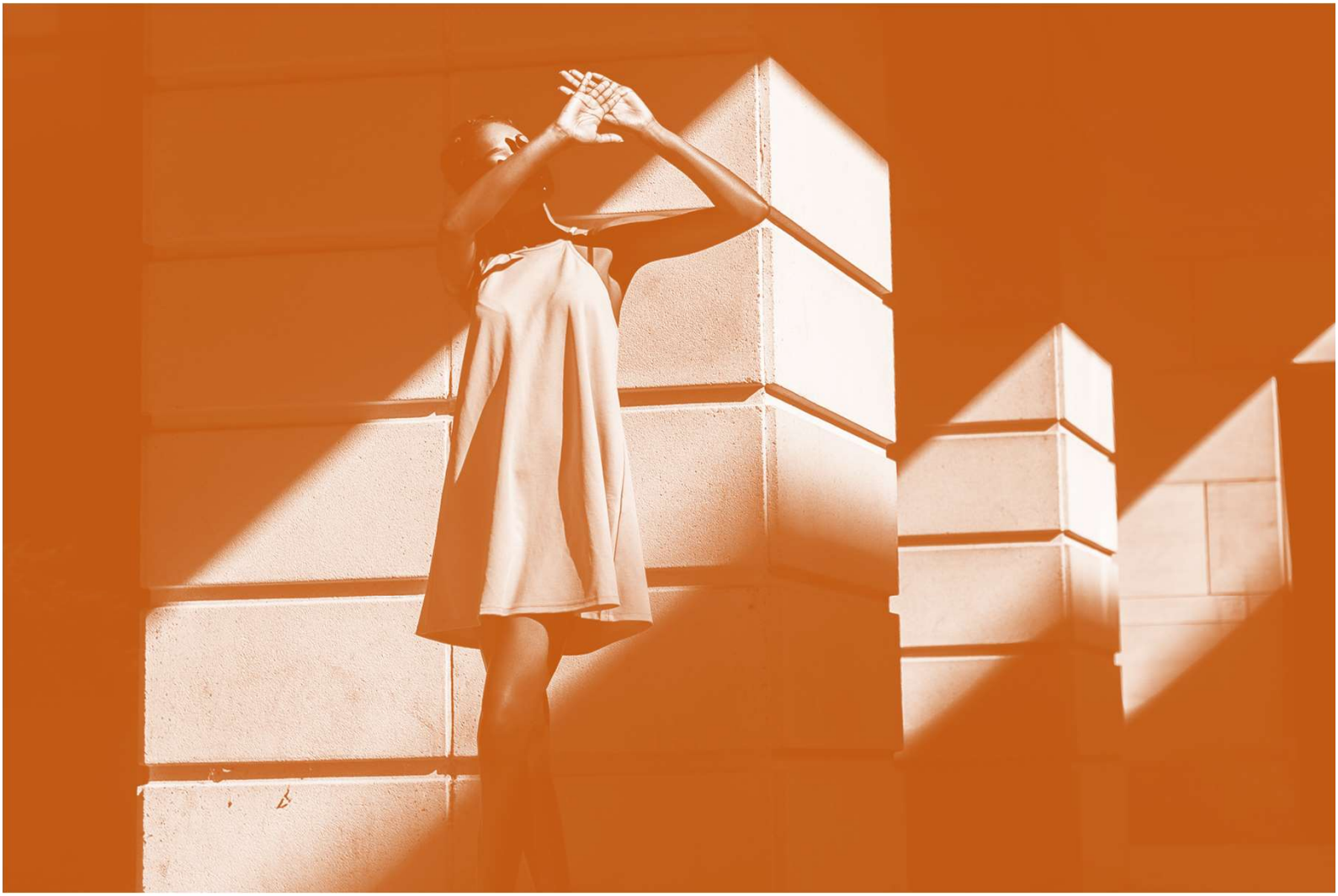
Learning something new seems to be what is mostly expected from Influencers. According to the results, Influencers should also discuss about topics of interest for their audiences (while this is logical, it is important to keep the insight in mind when working with them, certainly in the casting phase).

The size of Influencers' audiences does not seems to matter, nor does the fact that the Influencer is a controversial figure.

C - The impact of Influencer marketing activities

The third and final chapter of the consumer survey is dedicated to results.

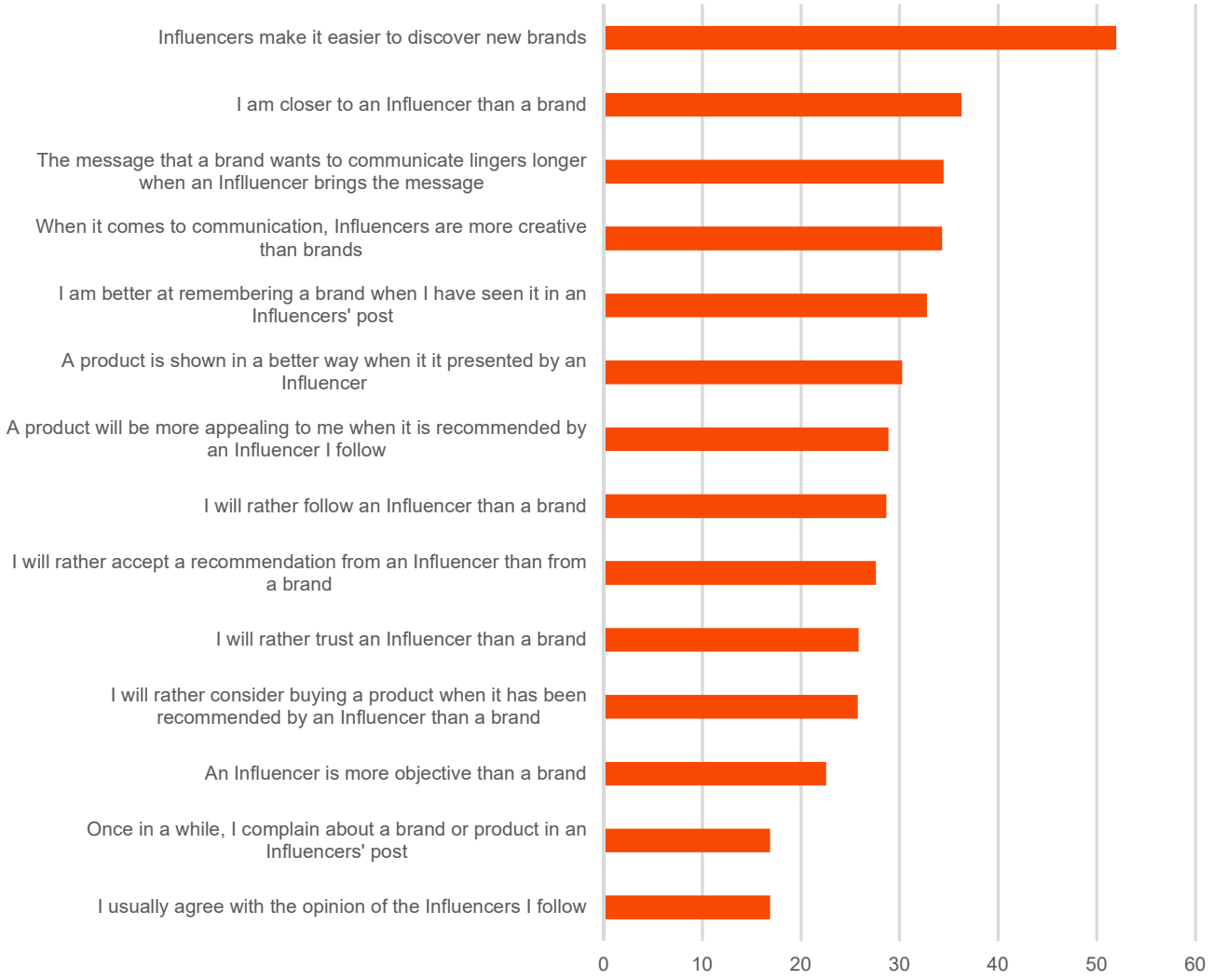
Do influencers have real impact? On what levers can they be game-changers?



From ‘discovery’ to ‘objectivity’

On “Influencers followers” population, in %

n=426



More than 52% of followers find that Influencers make it easier to discover a brand. Also worth noting is the fact that 30% of people declared that products are better presented by Influencers.

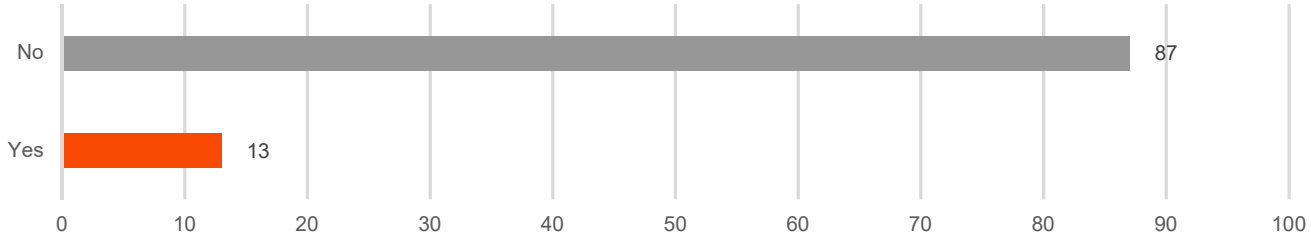
Trust and recommendation acceptance are both scoring around 23%. All in all there’s a clear funnel ranging from discovery to objectivity.

Awareness of #ad's meaning

On "Influencers followers" population, in %

n=426

Q: Do you know the meaning of #ad or paid partnership?



Explaining #ad

On "knowing the meaning of #ad"

n=139

Q: Can you explain the meaning of #ad?

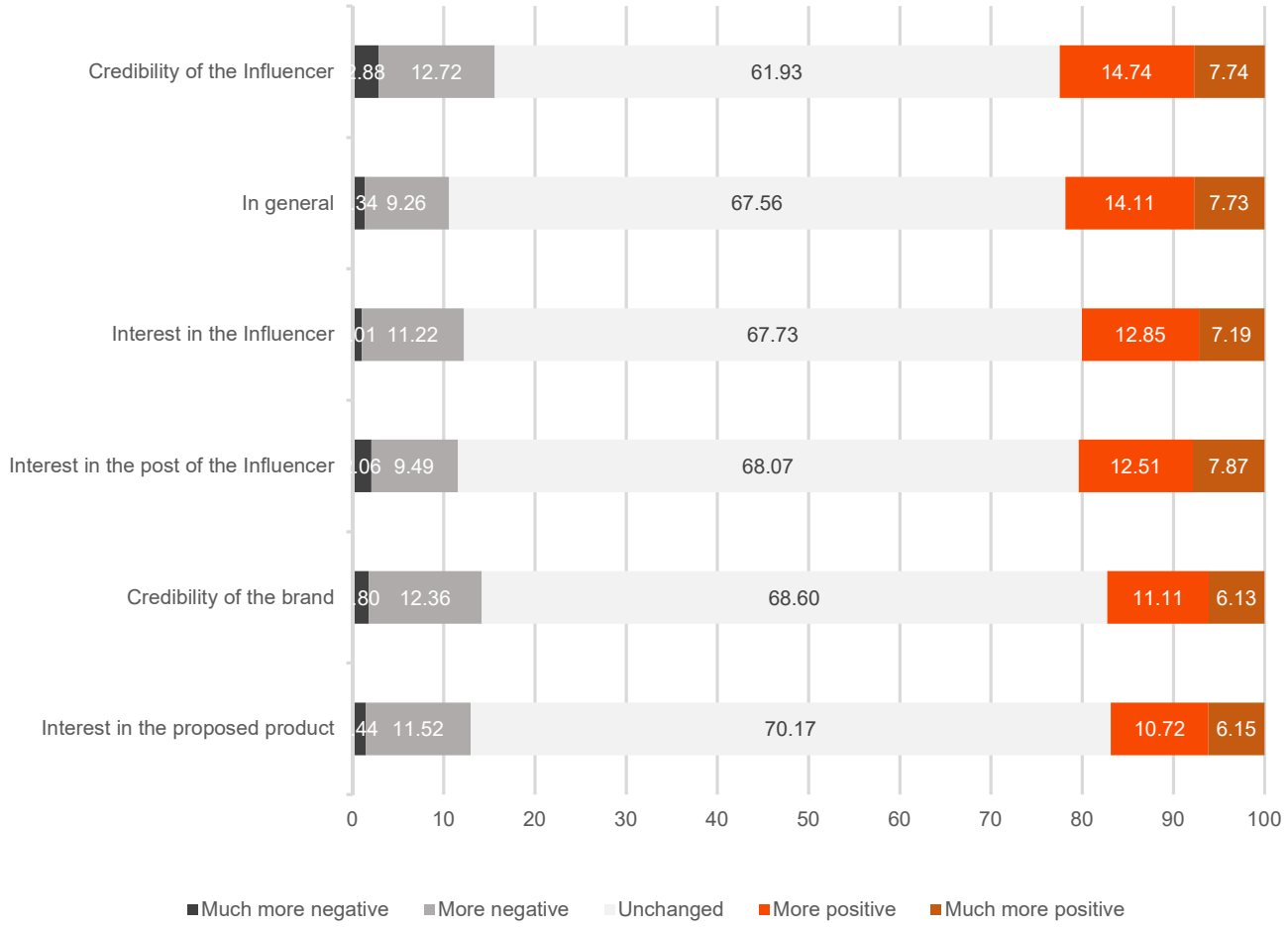
"Zodat de lezer weet dat de infuencer betaald wordt voor de bespreking die hij over een product/merk geeft.
« L'influenceur a été rémunéré pour parler du produit / de la marque.
"Deze persoon heeft een bericht geplaatst omdat hij betaald wordt door dat merk."
« Car la marque a fait appel à un influenceur pour lancer leur produit. »
"Om aan te tonen dat die post gesponsord is door een merk."

When looking at the first chart, it is clear that only a minority knows what #ad or paid partnership means. When filtering by usage or age, we note that heavy users and younger segments have more awareness of the hashtag's meaning.

Perception

On “Influencers followers” population, in %

n=426



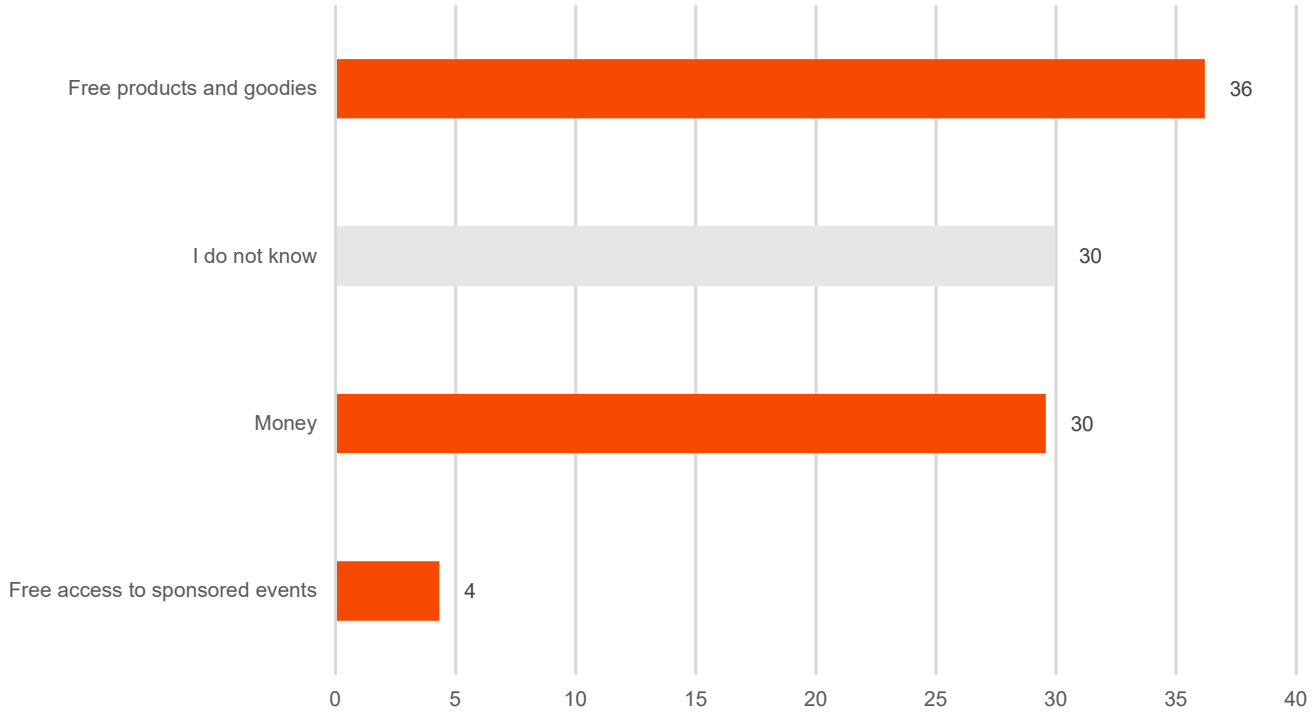
Informing people about the meaning of #ad does not change their perception about Influencers and brands.

Compensation

On “Influencers followers” population, in %

n=426

Q: How are Influencers reimbursed?



It seems that Followers are well aware of the fact that Influencers are working with a clear compensation for their services, whether it is a fee or free access to products, services and events.

Perception towards Influencers

On “Influencers followers” population, in %

n=426

Q: To what extent do you agree with these statements?

“

Don’t perceive a brand featured in an Influencer‘s post as advertisement

”

49%

“

Don’t feel bothered when an Influencer recommends a brand

”

67%

“

Pictures and videos that Influencers are posting are of equal or better quality than the ones made by brands

”

84%

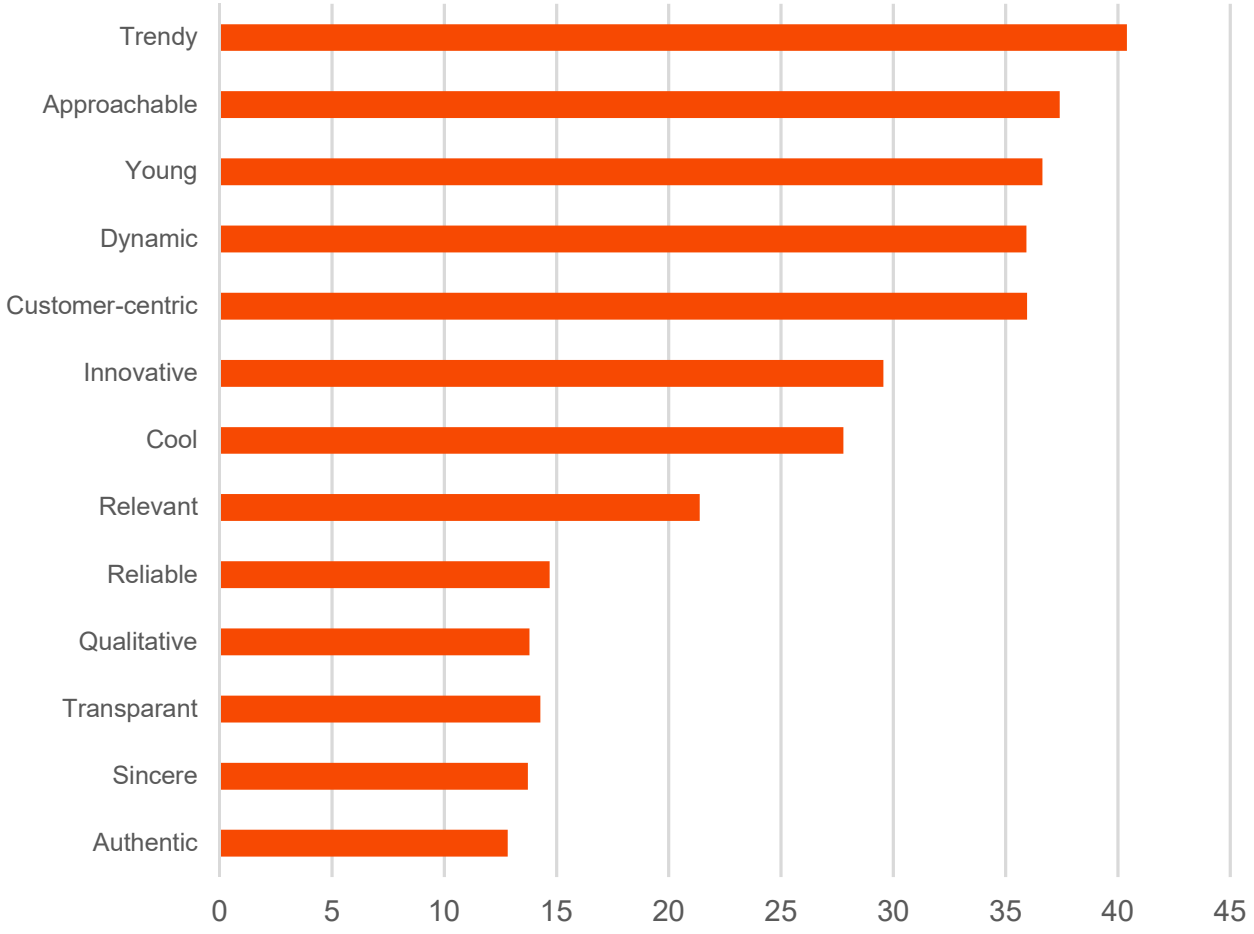
isobar

Brand perception

On “Influencers followers” population, in %

n=426

Q: To what extent do you agree that Influencers make a brand more…?



Influencers can make a brand trendy, approachable and young. Consumer centricity is also a key element with more than 35%.

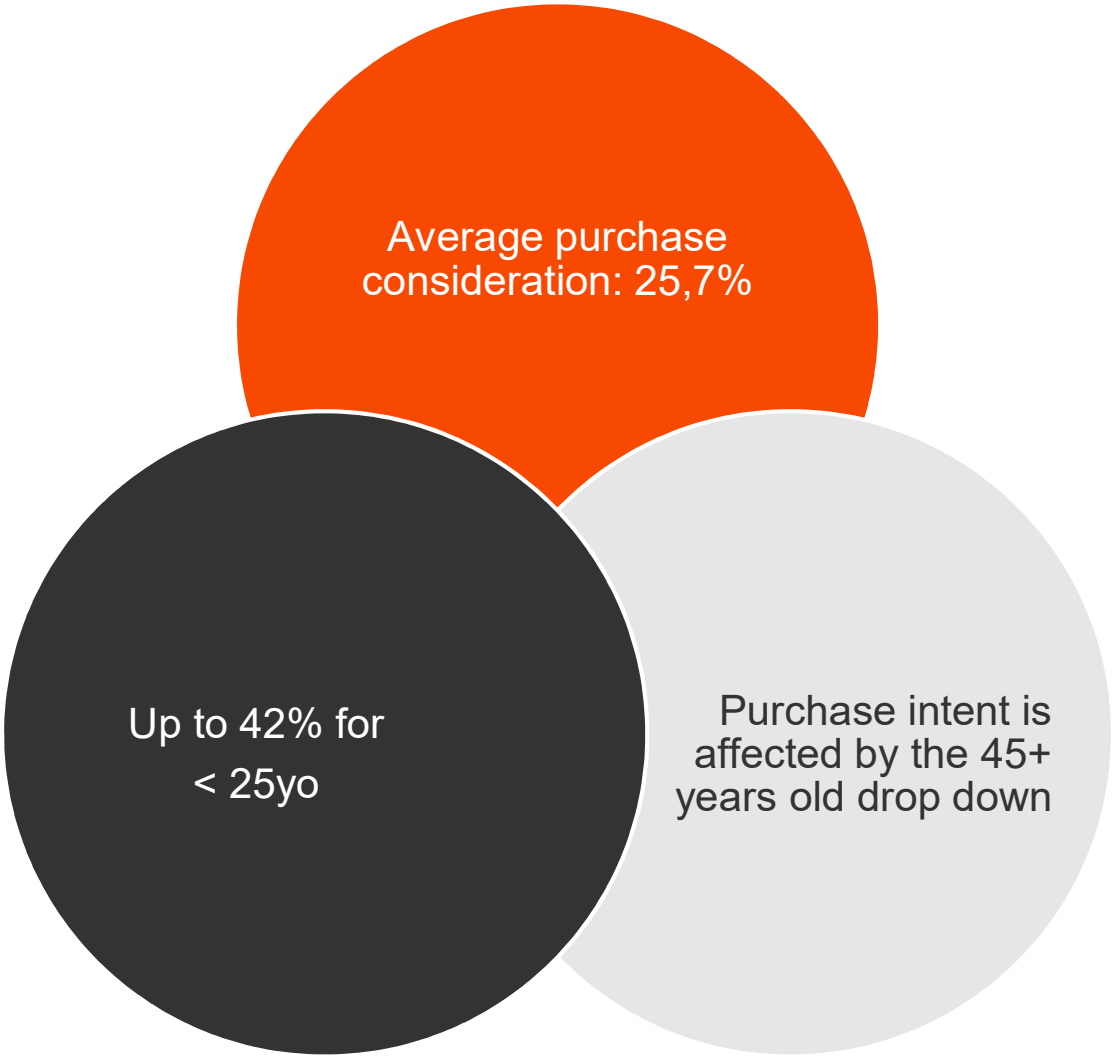
Influencer marketing clearly impacts brand perception (strong scores on both the “look” of the brand (trendy, young, dynamic, innovative, cool) and its “promises” (approachable and consumer centric.).

Quality, sincerity and authenticity are below 15%. This shows that Influencers might be a good vector for this but will not be able to create authenticity if not driven by the brand’s tone of voice.

Buying consideration

On “Influencers followers” population

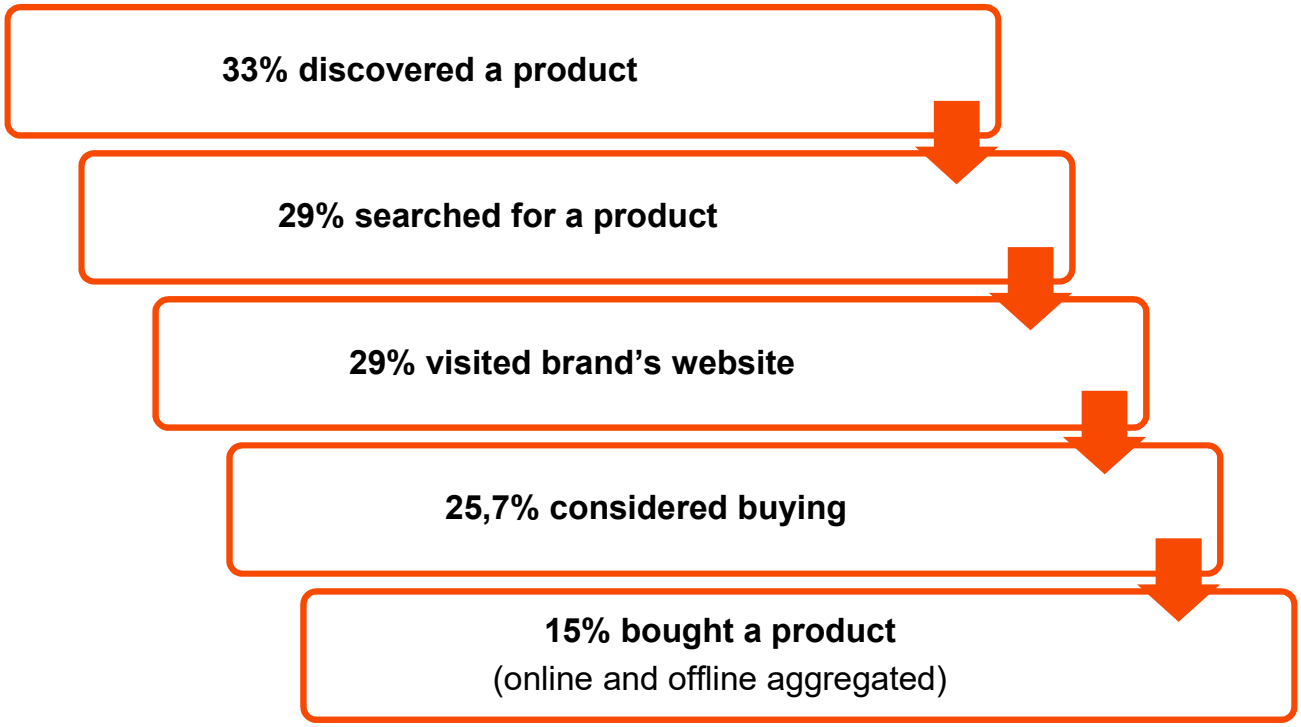
n=426



Effective impact

On “Influencers followers” population

n=426



Influence marketing plays a role in buying. The statistics during the last month shows its impact. Thanks to influencers, 33% of people discover a product and half of them buy one. The most interesting are young people 16-25 years old, with a buying consideration up to 42%.

Another insight that needs to be underlined, is that 30% bought a product (offline and online combined). That’s a great insight that breaks the digital silo and align the effectiveness for “digitally available products” and “brick and mortar” shops.

Consumer survey conclusions

A Social Media behaviour

40% of Belgians are heavy social media users. People are especially active on Facebook and YouTube, followed by Instagram. People under 25 use nearly 5 social media platforms, with no real preferred one. When spending time on social media, people especially like to observe and connect. Commenting comes in third place while authoring is least popular: with only a minority creating its own content. The biggest differences in usage stem from frequency, with Facebook being a clear frontrunner for the largest brackets. Platforms such as Snapchat and Instagram have a great impact on more specific age groups. Pinterest skews on women, and LinkedIn logically has a great impact on 25-55yo (active people).

B "Following" behaviour

People mostly follow friends, family and acquaintances – but an impressive **43% follow Influencers** (especially young women) – this mainly on Facebook, Instagram and YouTube. They follow mainly **artists** (musicians, actors, comedians), **brands** and **athletes**, as well as **online celebrities** – the latest being highly popular among younger audiences.

Belgian Influencers are massively followed (as opposed to international ones) and mostly for topics such as music, sports, news and travel. People follow Influencers to be entertained, informed and inspired – they are not looking for engagement. Followers appreciate tutorials, give-away / contests and artistic imageries the most. Even though influencers have a large potential, friends are the most important source of inspiration to try out new products. Preferred topics and formats are very different between age groups. You will need to analyse in detail those 2 parameters in order to efficiently integrate Influencers in your campaigns.

Consumer survey conclusions

C Impact of influencer Marketing

60% of Belgium's online population is aware that Influencers are sometimes promoting products and services, 50% perceive some of their posts as advertisement and a third declares that Influencers help them discovering new brands.

Conversion rate varies greatly in function of the age: 25,7% of followers will consider buying a product recommended by an influencer (vs. a brand) but this goes up to 42% for people under 25. Also worth noting, the impact of influencer campaigns remains high for age groups up until 45 year old. There are opportunities to here to work with older influencers or influencers with an older audience.

The survey highlights the fact that Influencers can make a brand appear more trendy and young, but also approachable and consumer centric. They do not, however, help increase sincerity or authenticity, just by sharing a product. This requires a strong storyline and said story should come directly from the brand, relayed by influencers. Only a minority knows what #ad or paid partnership means. Informing people about the meaning of #ad does not change people's perception about influencers and brands.

Key extracts from the consumer chapter

1

Influencer Marketing has a real impact in terms of effectiveness, recall and purchase intent This impact is clear for people under the age of 45.

2

Outstanding results under 26yo. On average this type of audience uses more than 4 social networks and follows a lot of different topics. A crossed data analysis will be needed to find the right place, right channel, right topics and formats… but impact is guaranteed as soon as the audience of the influencer is validated.

3

Your brand will be more Trendy, young and Dynamic; But also consumer-centric and approachable. Proximity can create a very strong leverage. Transparency, authenticity and sincerity have lower results. This will have to be supported by a strong storyline to happen.

4

Check your audience and integrate it in a media plan. Do not forget the basics: check your influencer's audience to reach Belgian (and real) people. Re-use of the content in your paid strategy will maximize your ROI on a controlled socio-demo-interest target.

Chapter 2
Influencers

Paper to be updated and published in October 2018,
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Chapter 3
Marketers

Paper to be updated and published in November 2018,
for more information please contact info.belgium@isobar.com

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