The State of Influencer Marketing

An industry analysis of branded partnerships and the strategies that reach success

klear
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In *The State of Influencer Marketing* annual report, we share with you the results and insights from 1.5 million Instagram #ad posts. This report offers a unique viewpoint on a rapidly growing industry which doubled its size in just one year. This year’s edition includes selected works of influencers who have partnered with the industry's top brands. We hope this will help you get inspiration from the best performing brands when shaping your influencer marketing strategy for 2018.

**Key Findings:**
- 1,504,383 Instagram posts were tagged with #ad in 2017.
- Influencer marketing grew by 198% in 2017.
- Fashion and Beauty are the leading industries for partnerships.
- 83.9% of the #ad posts were posted by women.

**Key Topics:**
* Growth of Instagram partnerships in 2017
* Growth in times of FTC transparency guidelines
* Industry demographics.
* Industries leaderboard
* Inspirational portfolio of influencer works

**How We Measured:**
* Tracking influencer partnerships on Instagram that follow the FTC guidelines and included #ad or #sponsored hashtags in the caption.
* Matching brands mentioned in the posts.
* Statistical analysis of trends.
Influencer marketing on Instagram **doubled** in 2017.

Influencers published 1,504,300 Instagram posts with an #ad hashtag in 2017, compared to 767,800 in 2016.
There were 1.5 million posts with an #ad hashtag on Instagram during 2017 - double the number of posts in 2016.

**Volume of #Ad Posts on Instagram**

<table>
<thead>
<tr>
<th>Month</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>67</td>
<td>134</td>
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<tr>
<td>August</td>
<td>70</td>
<td>142</td>
</tr>
<tr>
<td>September</td>
<td>73</td>
<td>139</td>
</tr>
<tr>
<td>October</td>
<td>78</td>
<td>147</td>
</tr>
<tr>
<td>November</td>
<td>85</td>
<td>161</td>
</tr>
<tr>
<td>December</td>
<td>86</td>
<td>171</td>
</tr>
</tbody>
</table>
Influencers posted 1,504,383 sponsored posts on Instagram during 2017.
2017 was the year where sponsored content reached a new level of transparency. On September ‘17, the Federal Trade Commission (FTC) guided marketers and influencers to clearly disclose their connections to the brands they promote or endorse.

The FTC’s new guidelines of transparency were adopted quickly. As can be seen here, the new rules did not change the growth trend of sponsored partnerships.
# Love

#ad Instagram posts got 1B likes in 2017 with an average of 682 per post.
Brands Focus on Micro-Influencers
Micro-Influencers were all the buzz in 2017. Marketers heard the rumor and follow through.

Micro-influencers enjoyed a lot of attention in 2017. More companies took their first steps in the field and did so by connecting with niche mid-ranged influencers.

The data shows that almost 90% of the sponsored posts in 2017 received up to 1,000 Likes per post, signaling the level of influence involved in #ad posts. The average #ad post got 682 Likes.
Gender

83.9% of the #ad posts were posted by women.
Millennials Create Most of the Sponsored Posts
Young Instagrammers welcome brand affiliation in their posts. Women are the top contributors.

Millennials Create Most of the Sponsored Posts

12-17: 13%
18-24: 42%
25-34: 30%
35-49: 13%
50-64: 1%

Gender Demographics

83.9% (♀) 16.1% (♂)
Influencer Partnerships: Top 10 Industries

We categorized each sponsored post by company and industry. Here are the top 10 industries that partnered with influencers in 2017:

1. Fashion & Accessories
2. Beauty & Cosmetics
3. Food & Beverages
4. Automotive
5. Consumer Electronics
6. Travel
7. Entertainment
8. Retail
9. Tech
10. Fitness & Wellness
Global Distribution of Sponsored Posts

The top countries in which sponsored posts were posted during 2017.

- USA: 49%
- UK: 9%
- Italy: 5%
- Germany: 5%
- Canada: 4%
- Australia: 4%
- UAE: 4%
- France: 2%
- Brazil: 2%
- Spain: 1%
* These are the most active fashion brands utilizing influencer partnerships in 2017 based on the Klear Annual Review.
1. Fashion

73% of luxury fashion brands have an active influencer marketing program.

Fashion is the no.1 category in influencer marketing on Instagram.

Following our research, 25% of sponsored posts are for fashion & accessories brands.

**The Daniel Wellington Sensation**

A fabulous example of a fast growing fashion brand in influencer marketing is Daniel Wellington. The company owes a huge part of its success to Instagram influencers.

The Swedish watches company was founded in 2011. Four years later, its earnings reached revenues of $220M/year by selling 1 million watches worldwide.

To raise brand awareness, Daniel Wellington partners with thousands of influencers globally. Each month, the company gets more than 50,000 new Instagram mentions from many different types of creators including both celebrities and niche influencers.

**The Opportunity of UGC**

Fashion brands thrive on Instagram. According to eMarketer, 96% of US fashion brands are on Instagram and 73% of luxury fashion brands have an active influencer marketing program. More than any other industry, fashion greatly enjoys the power of user-generated content. People love sharing new looks and being inspired by them. This leads to the greatest opportunity for brands to encourage customers and creators to share their outfits and raise brand awareness.
“The perfect accessory to this simple outfit.”

“Introducing a new icon - The #DWClassicPetite”

“I would never order a cookie, but I like stealing (parts of) people's cookies.”

“I'm always on vacation time according to my Daniel Wellington.”
## Coach

Selected Works of Influencer Partnerships

<table>
<thead>
<tr>
<th>Influencer</th>
<th>Score</th>
<th>Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanessa Balli</td>
<td>72</td>
<td>“Obsessed with my new @coach bag and this color”</td>
</tr>
<tr>
<td>Jana Rose Carrero</td>
<td>70</td>
<td>“To be you is to be strong.” - A message sewn into each Selena Grace @coach bag</td>
</tr>
<tr>
<td>Megan Welker Bravinder</td>
<td>66</td>
<td>“Heading into the weekend with this pretty little @coach”</td>
</tr>
<tr>
<td>Denise Johnson</td>
<td>61</td>
<td>“Time to bring out this little @coach cutie and explore the town a bit!”</td>
</tr>
</tbody>
</table>
"Sharing my favorite style of midi dress for everyday #momlife"

"Feeling sooo glowy with this look!! ✨ All the products are from Nordstrom"

"Photos from the Tulip Farm in this adorable dress from Nordstrom"

"Wearing white after Labor Day - Yay or Nay?!"
Lulus
Selected Works of Influencer Partnerships

Anna Rochella
14.7K
“This dress is so pretty. Lulus is the best place to shop for formal occasions.”

Chelsea Lankford
1.2K
“I love how many shades of burgundy there are in this red velvet Lulus jumpsuit”

Bree Kleintop
7.4K
Life is good ☕ #lovelulus

Laura Jade Stone
15.2K
“A cup of tea always makes you feel better ☕ Wearing lulus.”

Chelsea Lankford
84
Anna Rochella
86
Bree Kleintop
83
Laura Jade Stone
84

The State of Influencer Marketing 2018
Always a good time in Palm Springs esp in my @forever21 cut offs

“see ya l8r @forever21 #weareforever”

“Looking back at it in @forever21”
* These are the most active food and beverages brands utilizing influencer partnerships in 2017 based on the Klear Annual Review.
2. Food & Beverages
For millennials, Instagram food pictures are more than aesthetic, but are a part of their identity.

Instagram changed the way we think and treat food. From a mundane activity, it became an opportunity to share parts of your identity.

A Google survey found that when cooking at home, 27% of respondents were likely to share the experience with friends.

**Food is not just for Foodies**
Brands on Instagram consider food and drinks as a lifestyle experience.

As you can see from the Top 5 Food brands, they are not seeking foodies to be their ambassadors. Their teams of influencers are people of lifestyle, sports, creative, family, and entertainment.

Stunning food pictures became so ordinary on Instagram, that food brands were looking for something completely different. Instead of focusing on the product, they encourage influencers to showcase their experiences. This virtue fits millennials best: food is not just what you eat, it’s a way to define your self-identity.

**Meeting the New Food Values**
The challenge for the big food brands in today’s world is not just the high-end aesthetics standards, but other values people now seek in their food. Organic, local, vegan, or healthy food are just some examples of what people look for. For brands, partnering with relevant influencers who cherish these values is a great opportunity.
### McDonald's

**Selected Works of Influencer Partnerships**

<table>
<thead>
<tr>
<th>Influencer</th>
<th>Score</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hailee Lautenbach</td>
<td>87</td>
<td>“I only feed my pet seal (aka my bae) the best of food”</td>
</tr>
<tr>
<td>Andrew Kuttler</td>
<td>80</td>
<td>“Skatin' through Summer 📣 Always on board with a #McCafe Strawberry Shake”</td>
</tr>
<tr>
<td>Katie Stauffer</td>
<td>93</td>
<td>“When you ask Finn what he wants for pretty much any meal he always says McDonald's”</td>
</tr>
<tr>
<td>Matt Crump</td>
<td>87</td>
<td>“No dessert pairs better with my intergalactic magical wall travels than a McDonald's McCafe Shake!”</td>
</tr>
</tbody>
</table>
“Lost in paradise!”

“In celebration of Hispanic Heritage month I have partnered with Coca-Cola”

“That one time I dressed up all crazy and danced on the top of a float at Carnaval!”

“Summer moments with Coca-Cola & inspiration from #crete!”
<table>
<thead>
<tr>
<th>Influencer</th>
<th>Followers</th>
<th>Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mary Kate Robertson</td>
<td>97</td>
<td>“John Luke and I have been having fun with @hellofresh as you can obviously tell haha!”</td>
</tr>
<tr>
<td>Katie Shelton</td>
<td>82</td>
<td>“When our @hellofresh box showed up on our porch, she was the one to ask to get cooking.”</td>
</tr>
<tr>
<td>Amelia (Emmy) Jones</td>
<td>83</td>
<td>“My kids live for helping in the kitchen!”</td>
</tr>
<tr>
<td>Sarah Fortune</td>
<td>78</td>
<td>“Always wanting to “help” with dinner on @hellofresh nights.”</td>
</tr>
</tbody>
</table>

*HelloFresh* Selected Works of Influencer Partnerships

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<table>
<thead>
<tr>
<th>Influencer</th>
<th>Likes</th>
<th>Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adam Goldberg</td>
<td>91</td>
<td>“How good does a matcha green tea @Oreo cookie sound?”</td>
</tr>
<tr>
<td>Chrissa Sparkles</td>
<td>1.2K</td>
<td>“My #MyOreoCreation would be Strawberry-Lavender Sundae Oreo cookies, topped off with love!”</td>
</tr>
<tr>
<td>Juj Winn</td>
<td>696</td>
<td>“I've just been sitting at my desk dreaming of a vacation in the sun...”</td>
</tr>
<tr>
<td>ĀL</td>
<td>76</td>
<td>“Oreo as thin as my origami butterflies”</td>
</tr>
</tbody>
</table>

The State of Influencer Marketing 2018
Dunkin’ Donuts
Selected Works of Influencer Partnerships

Alyssa Amoroso 79

Krystal Faircloth 85

Sierra Furtado 98

Jeremy Cohen 83

“Mondays are always a bit better when iced coffee is involved”

“y’all have a S’MORES flavor for summer.”

“Give me a donut and you'll get this reaction”

“I am working with Dunkin’ Donuts to make it rain in NYC on a sunny day”

The State of Influencer Marketing 2018
These are the most active fashion brands utilizing influencer partnerships in 2017 based on the Klear Annual Review.
3. Consumer Electronics
Consumers seek genuine reviews leaving brands on the look-out for the best influencers to share them.

For the consumer electronics industry, being noticed on social media is a must. 72% of Instagram users said they make purchasing decisions based on products they saw on their feed.

**Embracing Authenticity**
The buyer decision process for an electronics product is quite different from fashion or food products. The time people take to make a decision is much longer with more thought put into it. Consumers today support buying decision with more knowledge. This is exactly where influencer recommendations comes into play.

In this industry, brands do not partner with influencers just for a photo display. They put a huge focus on encouraging their partners to share a genuine first-person experience. This is why it’s so common to see a variety of experts involved in each influencer campaign including product reviewers, photographers, lifestyle influencers and more.

**Long-Term Relationship**
The electronics industry evolves rapidly. New devices are launched every day and shelf lives are relatively short. Brands in this industry partner with influencers on the long run to inform them about new products and upgrades. For the companies, loyal influencers can lead to loyal customers.
“Adding the finishing touches to my look. My watch of choice tonight is the Samsung gearS3”

“Yes this is a real grizzly bear! @lgusamobile”

“Exhausted but happy we made it back to the parking lot in darkness... #DoWhatYouCan”

“Be free, be wild, be yourself .... Cuba mood”
This Dyson purifier that not only cleans the air but it cools and heats the space so I can do yoga

41K

my new Dyson cord-free has made vacuuming way more fun the past few weeks

1K

“The Dyson Pure Hot + Cool Link Purifier eliminates 99.97 of allergens and pollutants in my home”

4.5K

“They're having just as much fun playing with the vacuum as I am using it.”

8.2K
Kirsten Alana

“Thank you to @bose for gifting me this #Soundlink Micro that made our recent picnic at The Old Sugar Mill so much better”

Terri

“I cannot believe the power behind this @BOSE SoundLink Micro speaker 🎧 it’s incredible AND it’s waterproof”

Dominic Loneragan

“No wires, no distractions”

Atsuna Matsui

“Playing my favorite tunes helps set the vibe, especially as @BOSE Micro speaker has great sound quality.”
"I'm a long time supporter of @CanonUSA and the Canon80d doesn't disappoint!"

"I'm constantly asked what camera I use. So for this trip Canon is equipping me with Canon EOS Rebel T7is..."

"Spent the day shooting around town for a fun project."
Today I had the opportunity to test the phone brand ASUS Zenfone 3 MAX 5.5-inch.

Capturing this view in style using my #ZenFone3Zoom from @ASUSUSA

Stoked I was able to set a high shutter speed for this shot using my #ZenFone3Zoom

Did you see the new @asus phone?

“Did you see the new @asus phone?”

“Today I had the opportunity to test the phone brand ASUS Zenfone 3 MAX 5.5-inch”

“Capturing this view in style using my #ZenFone3Zoom from @ASUSUSA”

“Stoked I was able to set a high shutter speed for this shot using my #ZenFone3Zoom”
* These are the most active automotive brands utilizing influencer partnerships in 2017 based on the Klear Annual Review.
Car ownership among young people is declining. Millennials have a lower rate of car ownership than previous generations at their age. The car industry decided to fight back.

**Ridesharing vs. Car Ownership**

The top 5 companies in the field reveals a fascinating view about the transportation industry. The short list encompasses giants like Toyota, Kia and Mazda, alongside the new shiny ridesharing rivals, Uber and Lyft.

While both groups are fighting for millennials’ attention, their strategies are completely different.

The traditional car brands partner with Instagram influencers to promote values like the freedom to travel and living life to its fullest with no geographical boundaries.

The ride-sharing companies are going in a different direction. Uber and Lyft attract their target audience by pushing the buttons of who they are instead of what they own. On their influencer campaigns you’ll find lifestyle experiences like LGBTQ events, eating out and Netflix binging.

**Shaping a Flexible Lifestyle**

The automotive industry tries to win millennials’ trust, by shaping the way they think about their lifestyle and freedom. The top 5 brands here are a great example of how to show these values effectively with influencers.
"Got the chance to see the new 2018 @KiaMotorsUSA Stinger... and it looks absolutely amazing!"

"Another year of great designers and a game changing addition to the @KiaMotorsUSA family"

"I linked up with @KiaMotorsUSA to take the new #Cadenza17 for a spin"
#2 Toyota

Selected Works of Influencer Partnerships

<table>
<thead>
<tr>
<th>Influencer</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sam Landreth</td>
<td>86</td>
<td>“Marfa sunsets with @ToyotaUSA Highlander”</td>
</tr>
<tr>
<td>Alberto Ortiz Rey</td>
<td>88</td>
<td>“The new #ToyotaCHR will make you fall in love, not only for its engine or design, but for everything that goes with it!”</td>
</tr>
<tr>
<td>Dannon K. Collard</td>
<td>80</td>
<td>“Thank you @ToyotaUSA for making our trip to Maggie Valley so comfortable!”</td>
</tr>
<tr>
<td>Marissa Pedersen</td>
<td>71</td>
<td>“I was lucky to be driving a Land Cruiser from @toyotausa that smoothly went over all the snow and ice”</td>
</tr>
</tbody>
</table>
Always on the go, always on time.
Thanks to Uber

Uber makes adding extra pick ups easy w/ their new multiple locations

A sneak peek into a 'typical day' of mine & how much I rely on Uber to get around!
Selected Works of Influencer Partnerships

Goldenwoofs
80

Andrea Khoury
69

Devan
86

Erika Batista
71

“Woofs for a #zoomzoom weekend adventure”

“Feeling a little sporty this week in the @mazdausa #cx3!”

“Woke up to gorgeous Bay Area skies today + The New #MazdaCX5 To Get Me Around”

“This @mazdausa has the prettiest interior, #obsessed with the white leather seats”
"HUMANS!! Round up and donate your @Lyft ride to support the Human Rights Campaign."

"Thank you @lyft for getting me to the airport on time!"

"Zooming through the big city with @Lyft! Where is your ride?"

"In honor of pride month @Lyft is asking you to Round Up and Donate"
These are the most active travel brands utilizing influencer partnerships in 2017 based on the Klear Annual Review.
5. Travel

Millennials are inspired to take their next vacation to destinations they've seen on Instagram. According to an academic research that analyzed travel decision-making, 82% of the respondents indicated Instagram had influence on their travel planning.

**Promising Adventures**

Instagram took over the travel industry. In the top 5 companies you can find a variety of companies, from AirBNB, to airlines, hotel chains, and agencies. Although it's clear that no company can afford to ignore partnering with influencers, each brand goes in a different direction.

The top travel companies partner with photographers, travelers, and even fashion influencers. AirBNB promote experiences, while brands like Marriott focus on showcasing luxurious comfort. You also have brands like VisitDubai, who portray possible adventures.

**Unfolding the Unknown**

The promise in travel is for a new and exciting adventure. Travel encompasses the hope for meeting new people, seeing stunning sceneries, and experiencing foreign culture. Influencers play the role of helping the target audience decide where to go and what to do when they arrive.
Airbnb

Selected Works of Influencer Partnerships

Amelia Fullarton  78
“last minute weekend escape in this cosy @airbnb beach shack.”

Ryan Field  9K
“Weekend well spent @airbnb”

Veronica Ferraro  9.4K
“Enjoyed the best @airbnb experience today in Barcelona.”

Olya Hill  26.2K
“We took full advantage of new @airbnb experience and escaped for an afternoon of "us" time together mixed with the cocktail craft class..”
For those who think they can’t be in two places at once, think again!

“I can get out there using the Blue @Delta SkyMiles® Credit Card from @AmericanExpress.”

“Last night, I hosted the launch event for the new Blue @Delta SkyMiles Credit Card.”

“Thank you to @Delta and @AmericanExpress for a delicious evening last night with Chef.”
#3 Royal Caribbean

Selected Works of Influencer Partnerships

<table>
<thead>
<tr>
<th>Name</th>
<th>Score</th>
<th>Post Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shay Mitchell</td>
<td>100</td>
<td>Had the thrill of a lifetime last week on board Royal Caribbean's ship, Oasis of the Seas”</td>
</tr>
<tr>
<td>Anika Morjaria</td>
<td>78</td>
<td>“Harmony is truly an incredible ship!”</td>
</tr>
<tr>
<td>Dan Moore</td>
<td>77</td>
<td>“Home sweet home. Arriving at Airley Beach, Queensland”</td>
</tr>
<tr>
<td>Oliver Vegas</td>
<td>92</td>
<td>“It’s Caribbean time, for enjoy the most beautiful beaches, islands and sea.... with @royalcaribbean”</td>
</tr>
</tbody>
</table>

❤️ 685.3K

❤️ 2.1K

❤️ 500

❤️ 10.9K
Marriott Hotels & Resorts
Selected Works of Influencer Partnerships

Christine Hsu 85

“Let’s set sail!”

Keira 89

“Taking in my last few moments in Bangkok. Time for some home time with my fur kids @marriotthotels”

Kirsten Ortez 73

“Loved my stay at the @marriotthotels in Torrance last weekend!”

Peggy Dean 82

“What if... all those ideas that are born in the shower could be effortlessly captured?”
**Visit Dubai**

Selected Works of Influencer Partnerships

- Kenza Zouiten Subosic: 99
- Samantha Lee: 92
- Caroline Daur: 97
- Nina May: 83

**Kenza Zouiten Subosic**

“Arabian nights. One of my favorite moments from Dubai!“

**Samantha Lee**

“Making music video with my desert guide while admiring the breathtaking view. Dubai is mesmerising. (@visit.dubai)”

**Caroline Daur**

“Visited the desert in Dubai today caught this beautiful and special sunset “

**Nina May**

“We arrived in DUBAI the journey was great - Malina mastered the flight wonderfully”
Master Influencer Marketing in 2018

About Klear
Klear is an influencer marketing platform used by the world's leading brands and agencies.

With the power of 6 years' worth of historical data, Klear is proud of setting a new market standard for: measuring influence, vetting social creators, and measuring influencer campaigns.

2017 was the year Influencer marketing boomed. Don't let 2018 slip away. Schedule a demo today.