



INFLUENCE  
IMPACT

# NAVIGATING THE FLOW OF INFLUENCE

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2016 REPORT

ALLISON+  
PARTNERS



The background of the image is a dark blue gradient. Overlaid on this are numerous thin, tangled, and flowing lines in a lighter blue or teal color. These lines create a sense of movement and complexity, resembling abstract calligraphy or a network of connections. The lines are most prominent in the lower half of the image, where they form more dense, swirling patterns.

INFLUENCE IS EVERYWHERE.

[ OVERVIEW ]

# THE INTENSIFICATION OF INFLUENCE

For today's brands and the vibrant, and sometimes volatile global congregation of stakeholders they seek to inspire and engage, influence is everywhere.

Fueled by content of all kinds, it streams from nearly every imaginable source: from smart phones in pockets and screens in the backseats of cabs, to broadcast, print and new media bloggers, vloggers, viners and YouTube sensations.

The explosion of digital platforms that amplified voices like never before has obliterated traditional tactics and conventional strategies of engagement. Best practices that had proven resilient enough to remain relevant for decades across mediums as divergent as radio, print and television were reduced to obsolescence almost overnight. Though the new reality of social

media offered unprecedented engagement opportunities, it also sent brands scrambling for new tactics, metrics and methodologies.

The disruption was supercharged by the extraordinary proliferation of mobile technology. Suddenly, stakeholders were not simply a target audience on a new digital broadcast platform; they were vocal participants and co-creators in a complex ecosystem, pushing content back into deep networks and shifting circles of socialized connectivity that reached and engaged consumers with more credibility and relevance than even the biggest brands could hope to achieve.

## ABOUT THE INFLUENCE IMPACT REPORT

The Influence Impact report is an annual study conducted in partnership with Northstar Research that explores the dynamic forces that shape and drive consumers in an active ecosystem of influence. The study included a survey conducted between July 31 and August 7, 2015 of 2,000 U.S. respondents ages 18-74. The verticals tested include: telecom & wireless, food service, travel & leisure, health care, consumer electronics and devices, beauty & personal care, retail and consumer packaged goods.



[ OVERVIEW ]

# ACTIVATING INFLUENCE IN A COMPLEX ECOSYSTEM

The velocity of this  
constantly evolving,  
digitally driven  
“ecosystem of influence”  
is difficult for brands  
to grasp.

For many, fundamental questions remain unanswered, driving costly communications campaigns and strategies that hope to mitigate inefficient expenditures with best guesses and hedged bets.

Success today often hinges on correctly answering some truly challenging questions, such as:

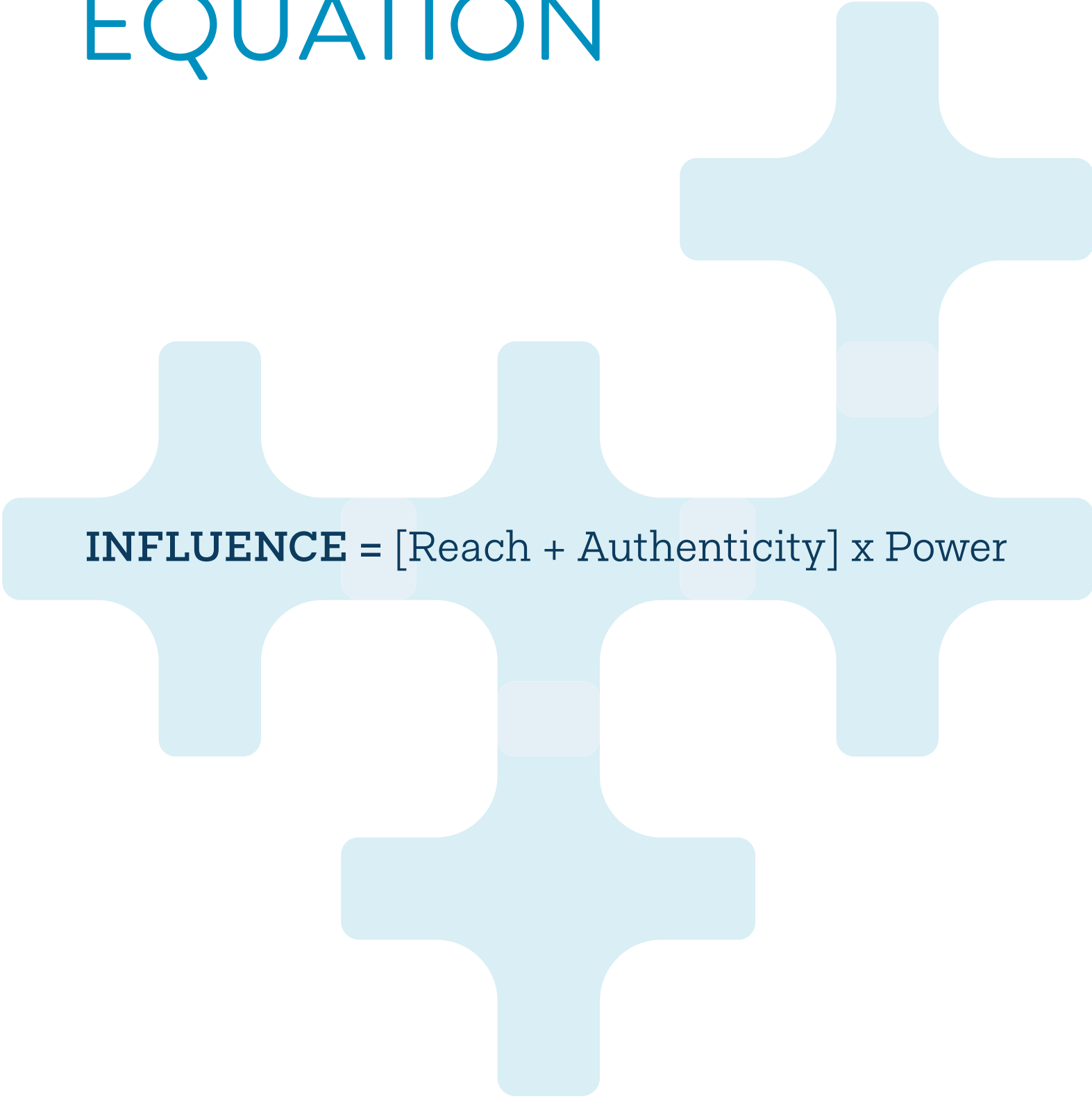
- + In an ecosystem shaped by nearly infinite, non-linear communication, where does influence begin and who is in control?
- + Which voices present the greatest opportunities for brands to activate influence?
- + What sources of information are the most influential for driving awareness and trial?
- + How can brands forge authentic relationships with consumers that lead to measurable business results?

Allison+Partners' inaugural Influence Impact Report, conducted in partnership with Northstar Research, pinpoints and clarifies the patterns and personas that shape and drive the influence ecosystem. Grounded in tangible research and data, illuminated by communications insight and expertise and designed to provide actionable understanding and informed next steps, the report offers brand marketers new insight into the questions posed above.

The study reveals that influence is more than the effect media and digital influencers have on consumers, more than the medium itself and far more than a one-directional channel to deliver information to stakeholders. Rather, influence only begins when consumers make a decision to move towards purchase. The study also uncovers three essential “personas of influence” brands must understand and activate to influence consumers to journey from initial awareness to consideration and then purchase.

[ THE ECOSYSTEM OF INFLUENCE ]

# THE INFLUENCE EQUATION



**INFLUENCE** = [Reach + Authenticity] x Power



To navigate this ever-changing and unpredictable ecosystem, one must first understand the concept of influence. Influence is defined as the capacity to have an effect on the character, development, or behavior of someone or something. In the marketing and communications landscape, this translates to:

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## **Reach**

The quantitative indicator of an individual's personal network and includes the number of channels augmented by the number of followers/circulation/viewership.

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## **Authenticity**

The qualitative evaluation of bias, or lack thereof. It is analysis of the source, an individual's personal credibility and the validity of their voice.

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## **Power**

The X factor that relates directly to impact and ultimately determines strength. This ability to take authenticity and reach and amplify them, comes from individuals with multiple channels of influence, a broad network of followers who are influencers themselves and an opportunity to access multiple platforms for storytelling.

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# INFLUENCE BEGINS WITH THE CONSUMER, AND IS A PULL, NOT PUSH.

As consumers have become increasingly comfortable with connecting, communicating and even boisterously disagreeing with brands and each other, the initiation of influence has shifted decisively. In fact, Allison+Partners' Influence Impact Report reveals that influence overwhelmingly begins with the consumer, who actively pulls influence in their direction.

## CONSIDER THESE FINDINGS

52%

ALWAYS PLAN AND RESEARCH  
BEFORE THEY BUY.

80%

SPEND LOT OF TIME RESEARCHING  
PRODUCTS BEFORE MAKING A  
MAJOR PURCHASE.

62%

ACTIVELY SEEK OUT THE ADVICE  
OF OTHERS BEFORE TRYING  
NEW BRANDS OR PRODUCTS.

59%

SAY PEOPLE OFTEN ASK THEIR OPINION ABOUT  
WHERE OR WHAT PRODUCTS, BRANDS OR SERVICES  
THEY SHOULD CONSIDER BUYING OR USING.

59%

ONLY BUY ITEMS THAT  
OTHERS HAVE BOUGHT  
AND TESTED FIRST.

## BASED ON THESE STATISTICS ...

**It's clear that influence is no longer something hidden and mercurial that impacts consumers beyond their control, but rather a conscious, informed decision consumers make to willingly and consensually allow brands the opportunity to change or reinforce their thinking.**

This understanding goes against the behaviors and assumptions made by many brand marketers that choose to utilize influencers as a channel for pushing content or to create “influence,” the noun. As a traditional marketing tactic, one might assume that enlisting a celebrity, bringing in an expert

or leveraging the credibility of a blogger will have a direct, causal relationship to influence, authentic engagement and success. While this remains anecdotally true to some extent, it is only effective when consumers allow themselves to be influenced.



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A dark blue background featuring a faint, stylized image of a hand holding a globe. The hand is positioned on the left side, with fingers slightly curled around the globe. The globe is centered and appears to be made of a grid of lines. The overall tone is professional and modern.

# PERSONAS OF INFLUENCE

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[ PERSONAS OF INFLUENCE ]

ACTIVATING THE  
“WHO” MAY BE  
MORE IMPORTANT  
THAN THE “WHAT”





There are two parallel forces that shape influence, both positively and negatively, in the ecosystem:

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## **Content**

The “what,” or any form of communication or information seen, internally or externally, by stakeholders, consumers or audience.

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## **Influencers**

The “who,” or anyone who has the ability to tell your story to priority targets.

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While the central question of “what” is fundamental to creating content that is driven by strategy and informed by overarching business objectives, it is the issue of “who” that, more and more, determines the success of that content reaching targets, raising awareness and changing thoughts and actions.

There are three “personas of influence” that present the greatest opportunities for brands to make an impact in the ecosystem:







## The Socially Conscious Connector

VALUES AUTHENTICITY



## The Commnivore

VALUES POWER

[ PERSONAS OF INFLUENCE ]

# THE EXPRESSIVE EXPLORER



Open to and inspired  
by new experiences

Research-driven and  
primarily uses social and  
online channels

Expresses opinions and  
actively seeks others views as  
part of the discovery process

Values “reach” because  
they value diversity  
in sources

Characterized by a strong love of change, Expressive Explorers represent the largest opportunity for brands to extend their reach, move market share from competitors and drive trial amongst new audiences. They offer brands parallel, simultaneous opportunities: they voraciously seek out information and content to better inform their decisions. As a result of their deep knowledge, others actively seek their insights. Ninety percent of Expressive Explorers agree that people often ask their opinion of brands and products, and they are very vocal in sharing their thoughts about new products and events with others.

As they begin their purchase journey, Explorers spend a significant amount of time researching and seeking out the advice of others, particularly relying on the opinions of those that have directly purchased or tested the intended product. Eighty percent hear about new products on social media before traditional media and 62 percent rely on blogs to find out about new brands and products. Not to be confused with tastemakers, Expressive Explorers want to make informed decisions based on online commentary, proven experiences and an established brand. As a result, online influencer engagement, word-of-mouth from family, friends and coworkers, product

reviews/tests, online experiential and traditional media outlets are important for establishing credibility with this discerning, research-driven audience.

Because Expressive Explorers both seek out opinions, as well as opportunities to share their own, they want brands they can talk about and talk to. Explorers appreciate brands that allow them to voice their opinions and be heard. As a result, brands should incorporate feedback mechanisms to hear from this vocal group, encourage direct experience with their brands and provide content that can easily be shared via their social networks, particularly on Facebook and YouTube, the two most dominantly used social channels.

INFLUENCER



[ PERSONAS OF INFLUENCE ]

# THE SOCIALLY CONSCIOUS CONNECTOR



Values “authenticity,”  
relying heavily on  
word-of-mouth, especially  
from friends and family

Have a defined world  
view and look for brands that  
share their POV

Believes brands should  
have deep commitment to  
community and shared values

Diversity and multiculturalism  
are an expectation

In the equation of influence, Socially Conscious Connectors offer brand marketers the opportunity to develop authentic, long-term relationships with their audiences. Since their decisions are guided by brand purpose and shared within trusted personal social networks, their opinions can carry great weight for brands.

Socially Conscious Connectors strongly agree that a brand should have strong CSR philosophy and give back to its community. Additionally, 93 percent believe that a brand's values should mirror their personal values. As a result, brands who seek to authentically connect with their customers must convey their commitment to creating a positive social impact. Moreover, because they form emotional bonds with brands, a brand's spokesperson plays a key role. Ninety-five percent believe the brand's spokesperson should be relatable, and nearly one-third strongly believing that a brand spokesperson should be of their same cultural heritage.

This consumer is likely 50 or younger, including both Millennials and Gen X. This is a group that believes in a shared planet. The term community relates to both the real world and the online world, and their behaviors online need to reflect who they are in the real world. While they are more likely

to be female and married, it can be inferred that this audience is also more apt to share news with others and have their opinions sought by others within concentric, personal social networks or within networks that share similar demographics or values.

Forty-seven percent of Socially Conscious Connectors use word-of-mouth, especially from friends and family, to shape their opinions of brands and products. Although they conduct research and seek out the opinions of others as they begin their purchase journey, clothes and quick service food are the categories most likely to be bought impulsively. While digital and social channels are important to this audience, they also value the shared experience of traditional media sources, especially television.

As relationships are key for this persona, word-of-mouth is their most frequently used source of inspiration to try a new brand or product, followed by traditional media, in-person experience of the product, social digital influencers and online media—with the expectation that brands offer the same aligned experience online and offline.



[ PERSONAS OF INFLUENCE ]

# THE COMMNIVORE



**Starts their journey  
in digital channels**

**Engages with breadth  
and depth of platform/  
networks with which  
to tell their story**

**More likely to be multicultural,  
comprised of largely  
Millennials and Gen X**

**Values “power”  
through multiple  
channel consumption**

A Communications Omnivore, or “Commnivore,” is a voracious consumer of media across all channels. These Commnivores find out about breaking news and products on social channels and turn to both online and offline sources of influence. Commnivores respect and embrace power in the influence equation. They have multiple channels of influence and allow brand marketers to engage with them across multiple platforms for storytelling at once.

Commnivores skew younger and more multicultural than the total respondents. Many have strong ties with family and friends, and 57 percent have children under 18 in the household. Because of these factors, multicultural marketing efforts are key, which can influence a brand’s content, tonality, imagery and offering. The brand’s visual style is also of significance, with 92 percent indicating that it should align with their own preferences. Nearly two-thirds say the brand spokesperson should be of their own cultural heritage.

Commnivores are aggressive consumers of media and are more likely to use and be influenced by every channel tested—both online and offline—than total respondents. However, this vocal audience starts their purchase journey on digital channels, and is far more

likely to be swayed by social and digital influencers than total respondents across each of the social platforms tested.

From their consumption and influence factors, we can infer that this audience is more aware and appreciative of brand efforts in emerging digital channels, which offer strong options for content amplification and underscore the need for holistic storytelling.

Out of the three personas, they are also the most likely to have changed their preferred brand in the past year. Their top sources include word-of-mouth, digital influencers, blogs, in-person experiential events, traditional media and online communities.

POWER





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# THE NEW RULES OF INFLUENCE

The origin of influence has changed, which means there are now new rules, strategies and tactics for brands to remain effective and relevant to their audiences.

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# CHECK YOUR SOURCES

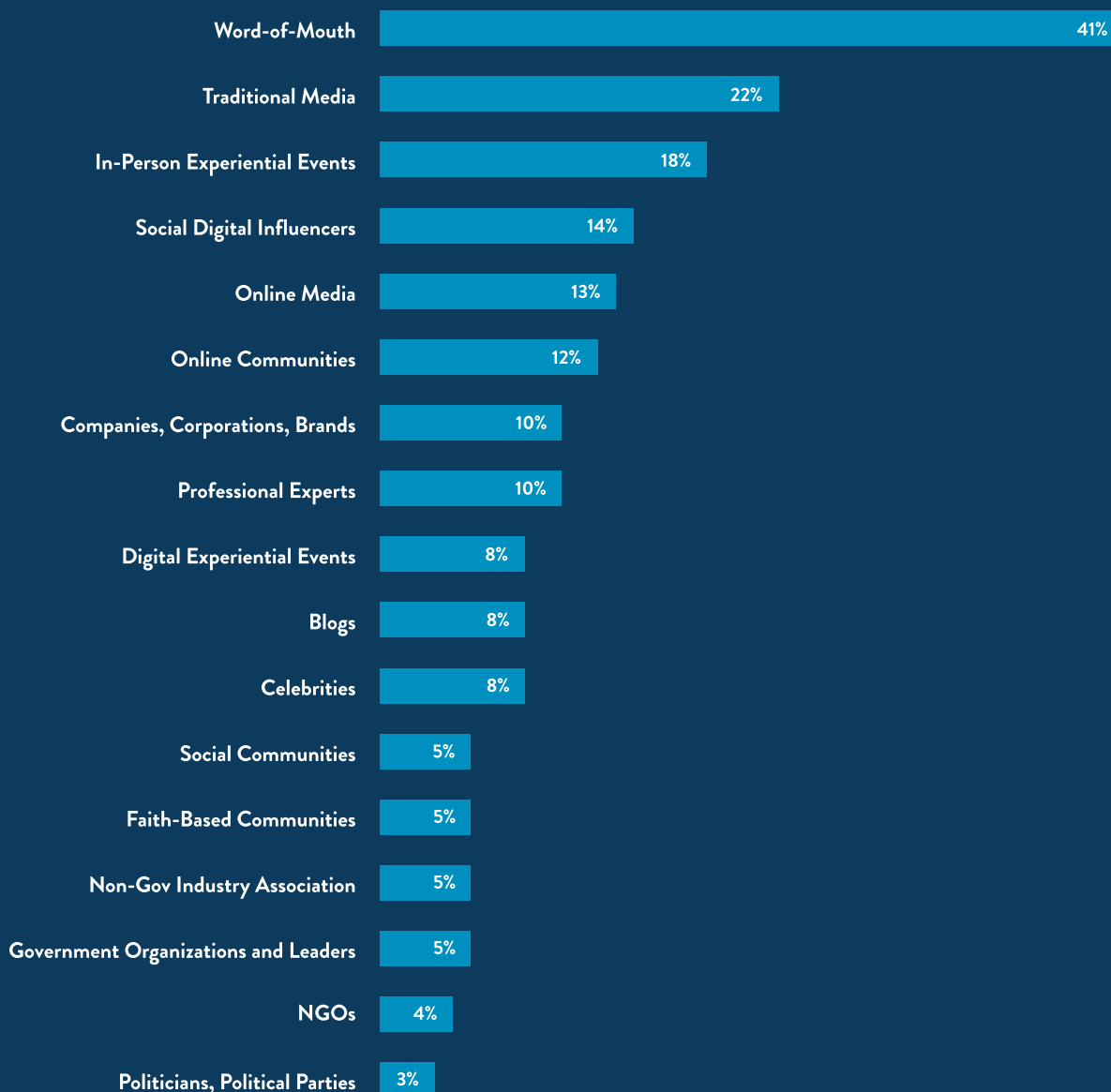
Brands must now identify stakeholders not only by demographics, but also by how willing and able they are to try something new. This can often be effectively tracked by looking at the sources consumers turn to in their search for information and entertainment.

The number of sources a consumer is influenced by directly relates to their willingness to switch preferred brands. Eight in 10 spend a substantial amount of time researching before making any major purchases. The less time spent and fewer sources reviewed, the less likely a consumer is to switch brands or make a purchase.

Consumers who don't plan to switch their preferred brands have been influenced by only one primary source. However, those who have switched or plan to switch are influenced by up to three sources. The number of sources is also higher among those consumers who self-identify as those who love change and trying new things (3.2 sources), as well as consumers who regularly share or seek others opinions/ share news with (3.7 sources).

Even though consumers may initiate the process of influence, it remains critical for brands to know which source has the highest level of influence so they are able to get them to change their behavior most effectively.

# WHAT INSPIRES CONSUMERS TO TRY A NEW PRODUCT, SERVICE OR BRAND?



# The sources that carry the most weight:

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## Word-of-Mouth

With 41 percent of respondents citing it as the most influential channel for trying a new product, service or brand, word-of-mouth is a critical tool for brands. Family and friends are the most important to activate in that group, making it more important than ever before for brands to try to achieve the kind of familiarity and credibility with existing and potential customers that comes with the “word-of-mouth” influence enjoyed by friends, family members and co-workers.

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## Traditional Media

Twenty-two percent feel that traditional media is an important source of information. Within this category, TV is the most important (40 percent), followed by magazines (27 percent), newspapers (22 percent) and radio (11 percent).

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## In-Person Experiential Events

Eighteen percent of respondents indicated that experiential events inspired or motivated them to try a new product, service or brand. Within that channel, in-store samples are the most influential (13 percent), followed by on-the-spot demos (10 percent).

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## Digital Channels

Digital channels make up a half of the top six channels that motivate audiences to try a new product, service or brand. At 14 percent, social digital influencers are the largest of the top three digital channels, followed by online media (13 percent) and online communities (12 percent). Social plays a much larger role in discovery for younger generations than older generations.

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# Awareness via Online Channels Word-of-Mouth Influence + Traditional Media

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## TRIAL

**To maximize the effects on influence, brands should also cross-reference their efforts with stakeholder demographics and traditional market forces. Some things to consider:**

- + Younger consumers rely on advice and recommendations more than older consumers, and also switch product more frequently. Consumers have more information than ever before. Consequently, eight out of 10 spend a significant amount of time researching products before making a major purchase. This is higher among those 18 to 34, who are more likely to switch products frequently and rely on advice and recommendations more so than older generations.
- + Fewer consumers are buying impulsively, which makes it harder for brands to use push marketing methods. Fifty-two percent say they always plan and research before they buy, while only 34 percent buy impulsively. As a result, pull marketing tactics are most effective.
- + Review sites and ratings are an important source of influence that should be vigilantly monitored by brands—particularly for larger purchases. Fifty-nine percent of respondents said they only buy items that others have bought and tested first.

# CONSIDER PERSONA BEHAVIOR WITHIN VERTICAL INDUSTRIES

As part of the methodology, deeper analysis of influence within eight vertical markets was conducted, with particular attention paid to the role of the personas in each and the prioritization of specific channels of influence. Within each vertical studied, persona insights reveal some interesting behavioral differences.





Whether it is a Commnivre deciding which cell phone carrier to choose or the Expressive Explorer looking to take on a vegan diet, the personas of influence give greater color to which channels and communications tactics can be deployed.

## VERTICALS EXPLORED



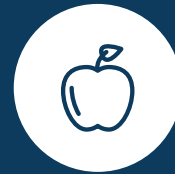
BEAUTY +  
PERSONAL CARE



CONSUMER ELECTRONICS +  
DEVICES



CLOTHING + FASHION



FOOD, BEVERAGE + GROCERY



FOOD SERVICE (QSR)



HEALTH CARE



TELECOMMUNICATIONS +  
WIRELESS



TRAVEL SERVICE +  
LEISURE



# THE EXPRESSIVE EXPLORER



40%

BUY TO HAVE THE LATEST AND GREATEST PRODUCTS IN THIS CATEGORY, AS OPPOSED TO ONLY 17% OF TOTAL RESPONDENTS.



21%

RELY ON CELEBRITIES AS A SOURCE, COMPARED TO 7% OF TOTAL RESPONDENTS. SOCIAL DIGITAL INFLUENCERS ARE ALSO IMPORTANT AT 31%, COMPARED TO 15% OF TOTAL RESPONDENTS.



30%

HAVE SWITCHED THEIR FAVORITE HEALTH CARE BRAND IN THE PAST YEAR, COMPARED TO 16% OF TOTAL RESPONDENTS. SOCIAL DIGITAL INFLUENCERS, FAITH-BASED COMMUNITIES AND IN-PERSON EXPERIENTIAL EVENTS ARE IMPORTANT CHANNELS OF INFLUENCE FOR THIS AUDIENCE.

# THE SOCIALLY CONSCIOUS CONNECTORS



17%

RELY ON CELEBRITIES AND 14% USE ONLINE COMMUNITIES AS A SOURCE OF INFLUENCE WITHIN THIS CATEGORY, COMPARED TO 8% OF TOTAL RESPONDENTS.



51%

BUY TRAVEL TO GET A MORE PERSONALIZED EXPERIENCE, COMPARED TO JUST 39% OF TOTAL RESPONDENTS.



49%

PURCHASE IN THIS CATEGORY FOR PERSONAL GRATIFICATION, COMPARED TO 38% OF TOTAL RESPONDENTS.

# THE COMMNIVORE



39%

RELY ON SOCIAL DIGITAL INFLUENCERS  
IN THIS CATEGORY, COMPARED TO 16%  
OF TOTAL RESPONDENTS.



LARGEST SOURCE  
OF INSPIRATION

SOCIAL DIGITAL INFLUENCERS ARE THE LARGEST  
SOURCE OF INSPIRATION OR MOTIVATION FOR  
THIS AUDIENCE, EVEN OUTPACING FRIENDS,  
FAMILY AND CO-WORKERS.



39%

HAVE SWITCHED THEIR FAVORITE OR PREFERRED  
BRAND IN THIS CATEGORY WITHIN THE PAST YEAR,  
COMPARED TO 19% OF TOTAL RESPONDENTS.

# ALIGN TONE AND PERSONAS

We've discussed the numerous channels by which content can be delivered, how and by whom. But the "what," or content, guides our narrative choices. To activate influence, brands must also align the tone and type of content they produce with the preferences and patterns of the personas they hope to engage.

Marketers can see how the content strategy and tone for engaging Socially Conscious Connectors, who crave authenticity, could be brought to life through word-of-mouth activities that emphasize brand purpose. The Commnivore, who consumes multiple channels of content expects brands to be digitally-savvy, will want personalized and compelling content that is easily found and shared across multiple platforms. Finally, Expressive Explorers, who are avid researchers, will need straight-forward content that makes it easy for them to understand USPs and compare products against competing brands.

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## **The Expressive Explorer**

Straightforward content that makes it easy for them to understand USPs

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## **The Socially Conscious Connector**

Word-of-mouth activities that emphasize brand purpose

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## **The Commnivore**

Personalized content that is easily found and shared across multiple platforms

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# ESTABLISH CREDIBILITY THROUGH PERSONALIZATION

Familiar and trusted relationships are the core ingredients to inspiring credibility among stakeholders.


With that credibility comes an exponential intensification of influence, and beyond that – true brand advocacy. With a greater understanding of customers—particularly within the persona types—a brand can deliver personalized experiences, develop a degree of familiarity with consumers and create interactions that have much greater efficiency and authenticity.

Research shows that greater degrees of personalization are directly tied to tangible business results. While basic reasons like replacing an old or broken product or immediate need are key purchase drivers for many consumers, the third

most common reason was “for a more personalized option that better suits my individual needs.”

Across demographics and types, audiences want to know how a product is going to better fit into their needs, their lifestyle and improve their experience, and may purchase a product they actually don’t need simply because they perceive it as a better, more personalized option.

Listening to customers and allowing them to co-create is also essential to building that relationship. Seventy-six percent of respondents agree or strongly agree that it is important for a brand to allow them to voice opinions and be heard.



“The importance of a brand’s authentic relationship with its customer has never been more critical. While trust and authenticity are always important, they can only be achieved and sustained through experience, proof in action and the development of real relationships that achieve a degree of familiarity. Within the influence ecosystem, it is important for brands to provide the means to curate these relationships with existing and potential customers.”

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— COREY MARTIN

MANAGING DIRECTOR, CONSUMER MARKETING

# IN SUMMARY

- + **Influence is** a dynamic, **ever-changing** “ecosystem” with two primary forces: content and influencers/consumers.
- + Within that ecosystem, **the flow of influence starts with the consumer** and is a pull, not a push.
- + Influence is an equation = **(Reach + Authenticity) x Power.**
- + By targeting and engaging three “personas of influence” that are optimized characterizations of consumers who can activate a positive influence flow – **The Expressive Explorer, The Socially Conscious Connector and the Commnivre** – brands can efficiently identify and achieve influence, as well as tailor content and communications.





- + **Consumers are influenced by a myriad of sources, and that varies by segment/category.** The number of sources directly relates to their willingness to switch their preferred brands.
- + The specific channels of influence can be further evaluated and **prioritized by the stage of the purchase decision** and the product category under consideration.
- + With sources of influence, word-of-mouth is the most effective. **Credibility and authenticity are the pillars of word-of-mouth influence**, and sustained familiar relationships with customers are the key to earning credibility with consumers/customers.

## [ ABOUT ALLISON+PARTNERS ]

Allison+Partners, an MDC Partners company, is a global communications firm driven by a collaborative approach to innovation and creativity. The firm was named PRWeek's 2015 "Midsize Agency of the Year," In2 SABRE's 2015 "Most Innovative Agency" and The Holmes Report's 2014 "Agency of the Year." Allison+Partners is organized around seven practices: Consumer Marketing, Corporate, Global China Practice, Health + Wellness, Public Affairs, Social Impact and Technology, and has offices in San Francisco, New York, Boston, London, Tokyo, Beijing, Shanghai, Paris, Lyon, Singapore, Chicago, Washington D.C., Silicon Valley, Seattle, Dallas, Los Angeles, Atlanta, Phoenix, Portland and San Diego. The agency also has a network and deep affiliations with firms worldwide through MDC Partners (NASDAQ: MDCA, Toronto Stock Exchange: MDZ.A), a progressive marketing and communications network, championing the most innovative entrepreneurial talent.

**For more information, visit [www.allisonpr.com](http://www.allisonpr.com).**

## [ ABOUT NORTHSTAR RESEARCH ]

Northstar is grounded in a unique culture of "Fearless Intellect" exemplified by courageous thinking that will take you beyond your limitations. Northstar people are unshackled in our passion for delivering unconventional thinking that leads to pragmatic solutions. With five offices on three continents, we are a Global Hub of Collaboration that attracts visionaries from academia and media, luminaries and experts. Northstar has a broad range of experience in a wide variety of market sectors, research methodologies and cultures. We specialize in extensive programs to inform change in behavior and communications strategy. We believe in the power of the imagination as a tool to providing solutions to our clients' challenges.

**For more information, visit [www.northstarhub.com](http://www.northstarhub.com).**



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