

collectively

Social Influence in a Changing World

2020 Takeaways for a New Era



About Collectively

Collectively is a global
social influence company.

We tap into the power of social influence
to help brands build cultural relevance and
deepen relationships with customers. We're
recognized as industry innovators delivering
strategic, creator-led marketing solutions for
the world's most beloved brands.

In 2020, we joined You & Mr Jones—
the world's first Brandtech™ group.

Our Clients



CONVERSE ➤

▲ DELTA

EOS



intuit.

LinkedIn

pandora

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01

Welcome + Methodology



Welcome to 2021

2020 accelerated growth and innovation for influencer marketing. It's now tied with social media marketing as **marketers' #1 investment priority for 2021.**

As our discipline becomes more tuned toward performance, we believe we must continue to balance results with the humanity behind the practice. From the values that guide partner selection to equity in creator compensation, **2021 is a critical time for marketers to refine their approach.**

As we do every year, we've connected with our marketer and creator communities through anonymous surveys to uncover fresh insights that can inform the year ahead.

We hope these findings inspire you to support your community as we move together into a brave next chapter.

Cheers,

Team Collectively

This year we heard from:

26

SENIOR MARKETERS ACROSS

15

INDUSTRIES, INCLUDING

385

SOCIAL CREATORS WITH AN AVERAGE AUDIENCE REACH OF 130,000 FANS, AND AVERAGING 3 YEARS EXPERIENCE PARTNERING WITH BRANDS

Want to receive year-round analysis?

[Sign up](#) for our monthly observations and insights.



Takeaways for 2021

While people around the world stayed home in 2020, time on social networks increased, leading to an even stronger cultural embrace of creators. Sentiment within the business community followed, setting up a big increase in investment and evolution for 2021.

95% of marketers said influencer marketing was an effective use of budget.

Takeaways for 2021

1

Values matter more than ever.

COVID-19 and the Black Lives Matter movement fundamentally changed culture online and offline. Brands need to establish clear values and standards to keep up.

2

Social + *Influencer* work better together.

Influencers now play an essential role in social strategy. A brand's influencer practice cannot realize its full potential if operated in a silo, and modern organizations should evolve to support that collaboration and connection.

3

Analytics must be demystified.

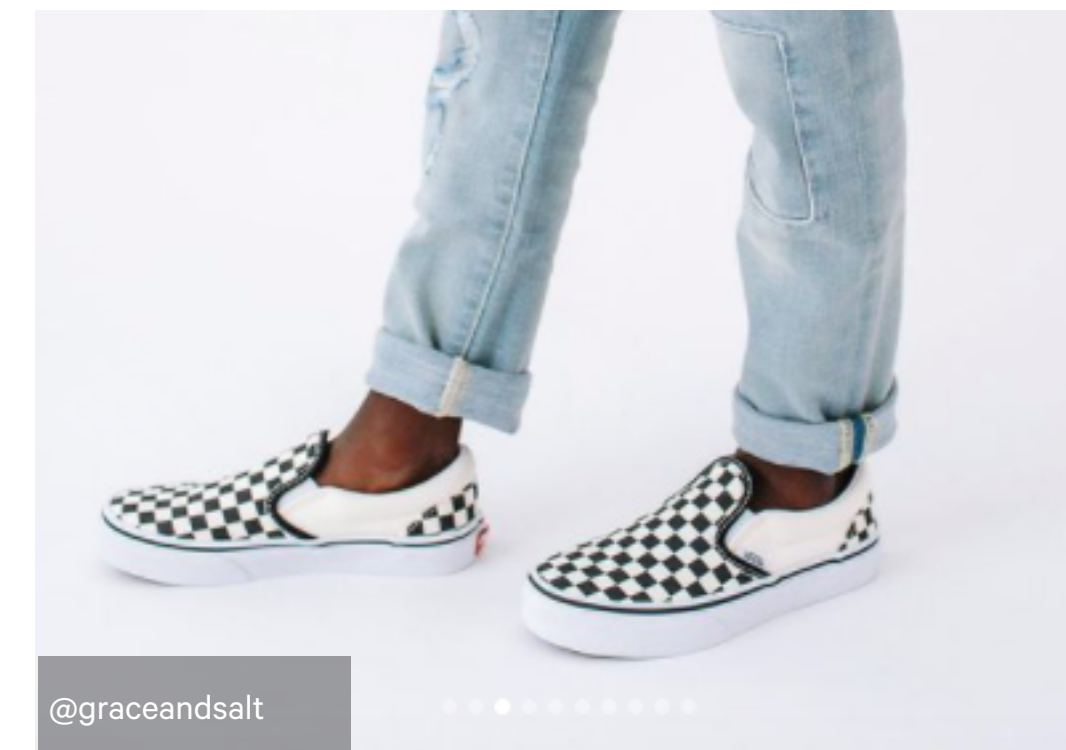
How best to measure ROI has been marketers' #1 challenge since we began this annual survey in 2017. Even as they grow their investments in creator content, we continue to hear that marketers aren't always clear on how to analyze performance.

Takeaway for 2021: Values Matter More Than Ever

Commitment to diversity, inclusion, and pay equity in casting are paramount, particularly as content reuse becomes more sophisticated and widespread.

Sampling campaign participation plunged as many creators saw an uneven value exchange and stood up to require payment for their labor. Creators cited increased affiliate offers—deals where brands often walk away with valuable content without guaranteeing compensation for creators.

Takeaway: Marketing teams must start a new chapter, one in which actions are aligned with values and individual accountability is non-negotiable.



Collectively's investment in our strategy team and practice stands apart.

We believe strategy is essential to brand safety and that every aspect of a collaboration requires tailored planning, from recruiting to compensation to content briefing to audience retargeting.

Takeaway for 2021: Social + Influencer Work Better Together

The majority of marketing organizations now co-fund influencer investments between 2 or more other internal teams—up **31%** in 2020. And investments from social media marketing teams increased **24%**, signaling more collaboration and integration.

Brand teams are increasingly using social teams' data to inform influencer evaluation and benchmarking.

Takeaway: Adopt a complete social influence approach and create message continuity, maximize the value of influencer relationships, improve utilization, and minimize content misuse.



Collectively's latest agency offerings enable marketers to achieve a truly integrated social influence practice.

We're experts in everything from celebrity activations and product sampling, to community management and social campaigns via Collectively Studio—our high-quality, creator-powered content production model.

Takeaway for 2021: Analytics Must Be Demystified

66% of marketers still don't have an influencer ROI model, and there is no industry-wide consensus on what matters most. Marketers cited 9 different KPIs as being the single most important metric.

61% of marketers do not have technology services or subscriptions for in-house campaign management. Even with influencer technologies at their disposal, data tracking is still ad hoc and often managed in low-fi spreadsheets.

Takeaway: Influencer marketing cannot be done well without software to drive performance analysis. The right tech stack ensures efficiency and transparency, and enables brands and agencies to build data-backed strategies for success.



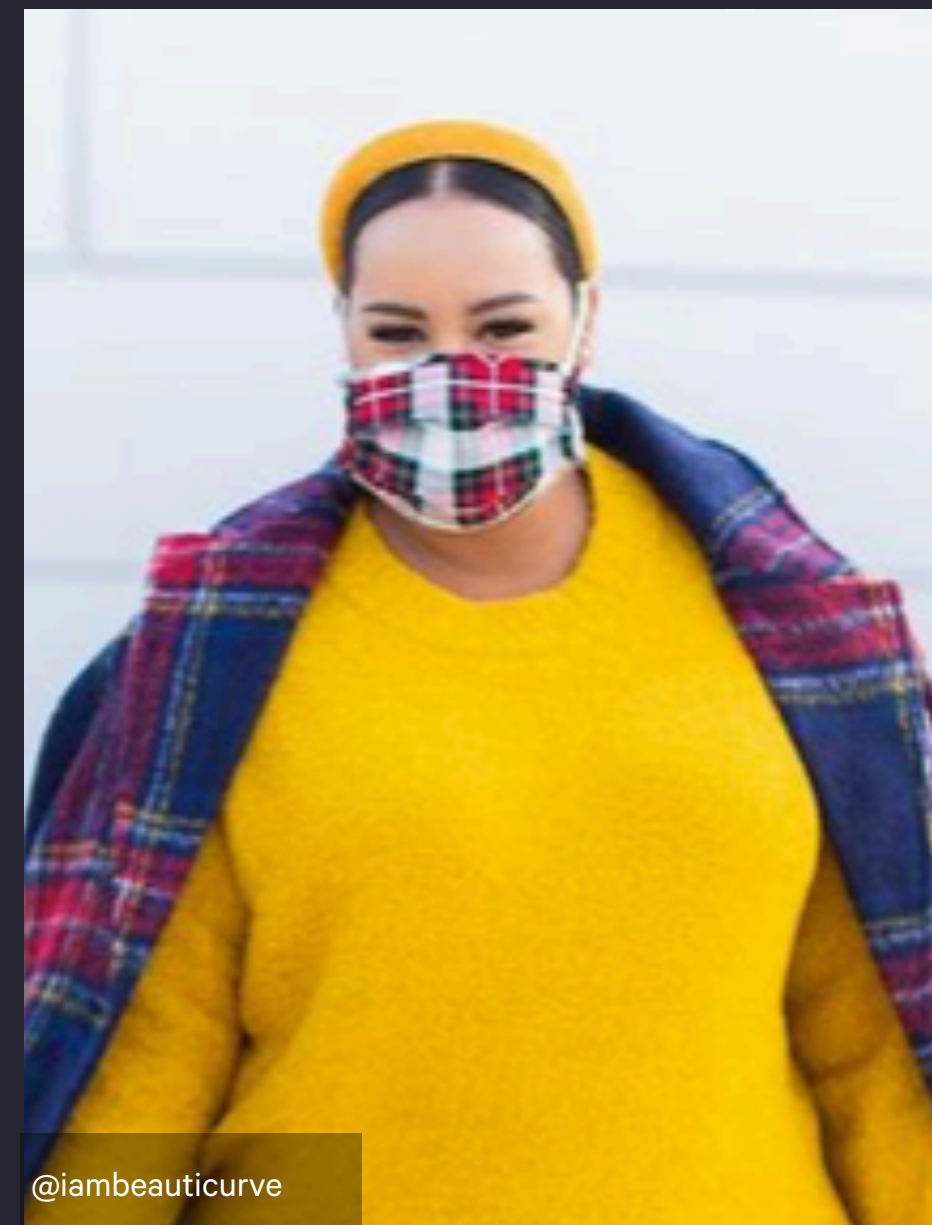
@nataliezfat

Collectively joined You & Mr Jones, the world's first Brandtech group in August 2020.

Our commitment to offering best-in-class tools, including our proprietary REACH technology, arms our clients with real-time performance tracking, comprehensive influencer and audience data, and authenticity tracking.

03

COVID-19 Business Impact



COVID-19 Impact: Unique Challenges

COVID-19 touched every aspect of life in 2020. Creators faced unique challenges in creating content at home and adjusting their tone to match the moment. Some even noted a need to reflect on why they create, reemerging with renewed purpose.

Marketing budgets

40% of marketers experienced budget cuts due to the pandemic. **However, influencer budgets were fairly well-insulated.** 46% said influencer budgets did not change due to COVID-19, and 21% invested more heavily in influencer than planned due to the pandemic.

Creator partnerships

32% of creators had 1 or more campaigns canceled early in the pandemic. For 53%, **partnership deal flow resumed by year-end.** The creators we spoke to worked on an average of 5 brand deals (paid and unpaid) per month—which is the same average volume reported in 2019.

“For a few months I had no work, and then by late summer I had more content creation jobs than ever, and that has held steady through winter.”

“I was often traveling, eating out, adventuring, etc., and I have been strictly quarantining since COVID-19 began, so it is difficult to create content right now.”



“I want to be mindful of what I'm posting during this time. I don't want to push customers to "buy" product(s) or services that they may not be able to afford but at the same time, it is also a part of my job.”

Case Study: Production Pivot



Stay-at-home orders left a major apparel brand scrambling for product imagery. Collectively quickly built a creator-based remote production solution to source photography of spring and summer styles for the brand's product web pages, print, email, and social content needs.

14 creators together delivered 3,500 photo assets in 3 months. This production pivot included the added bonus of social distribution, for a total of 1M impressions and an 8.66% engagement rate.



COVID-19 Impact: Opportunity for Growth

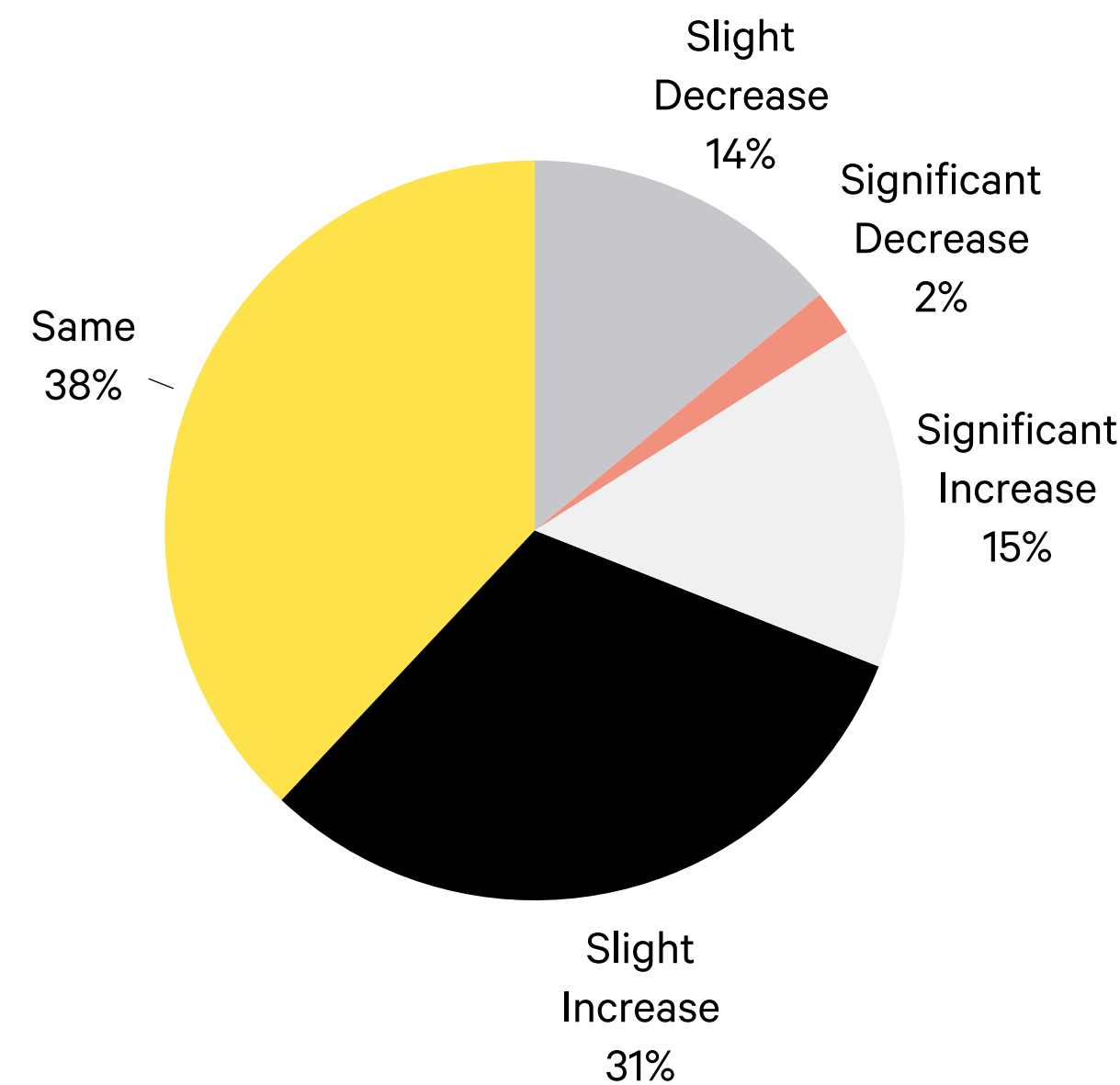
Content creators represent some of the smallest of small businesses.

For a year when small businesses faced extreme hardship, it's noteworthy that **73% of creators reported business growth in 2020.**

Creators from all audience sizes experienced growth, with **38% classifying this growth as “significant.”**

COVID-19 Impact: Compensation

2020 influencer rates



46% of creators reported an increase in their fees in 2020. Though channel maturation and expansion supported creator business growth, increased rates were also a major factor.

Rate increases are hard-earned and attributed to:

- Audience growth
- Improved content quality and production tools
- Consistent, broad demands for licensing
- Creator experience and confidence

Creators' #1 challenge is securing paid deals. On average, they work with 9 different influencer agencies to source brand deals (many cited working with up to 20-30).

Widespread momentum for pay equity and rate transparency came to the fore after the expansion of the Black Lives Matter movement during Summer 2020.

Analysis of Q3 + Q4 Collectively project data shows a 34% increase in compensation for creators of color.

"I grew my audience, I have improved the quality of my content and expanded my photo/video skills. I strive to always push the boundaries."

"I follow the @influencerpaygap on Instagram and became aware of how much I was cheating myself and how much I was allowing brands to low-ball me."

COVID-19 Impact: Revenue Preferences

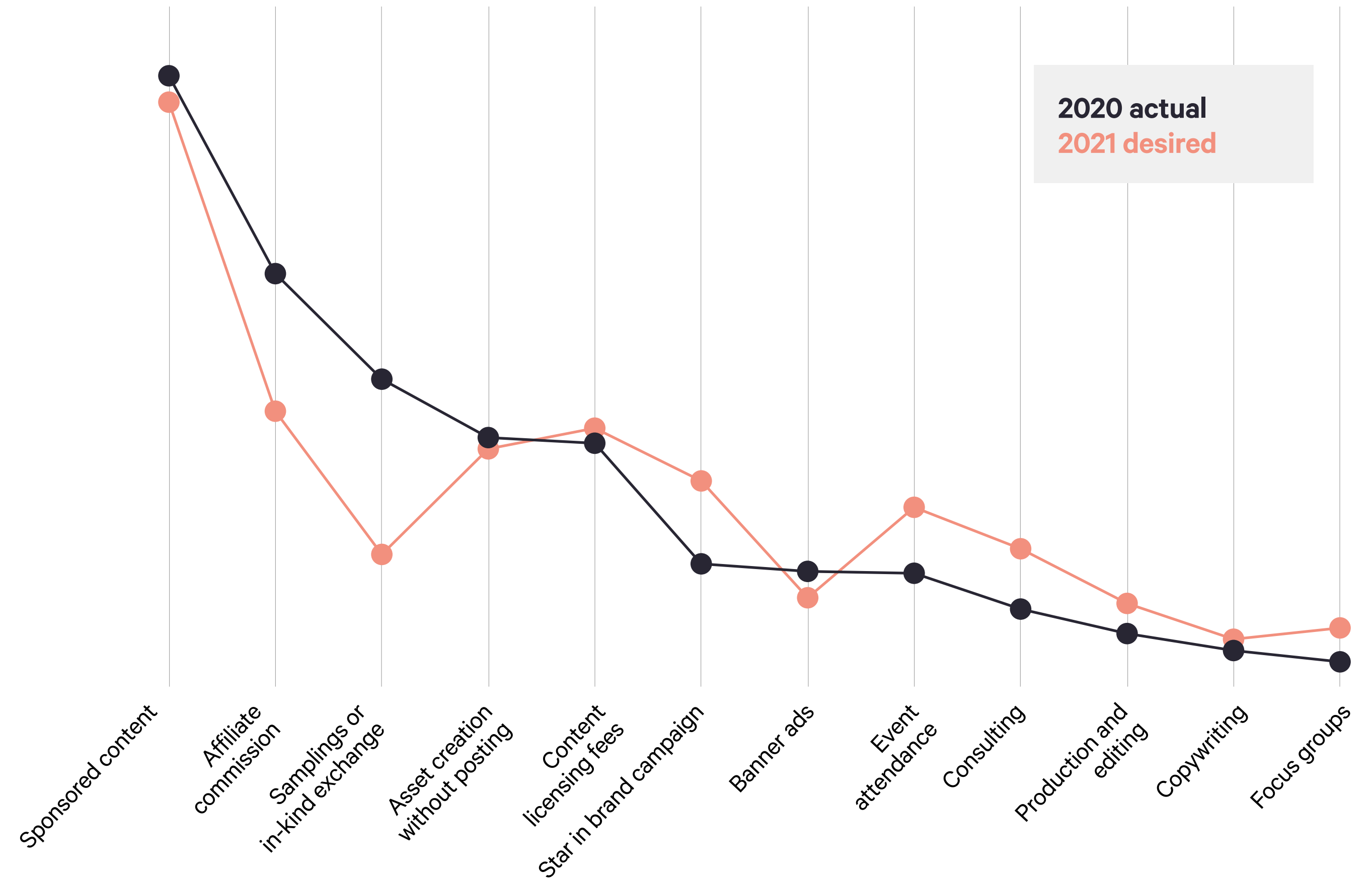
Interest is declining for in-kind/sampling and affiliate-based offers.

Only **42%** of creators cited openness to in-kind offers—**down 26% YOY**. **40%** of creators experienced an uptick in affiliate opportunities.

Many creators see these opportunities as unfair because brands receive valuable content and endorsements without risk, but creators earn a fraction of their fees.

Takeaway: Tune into how partners receive your brand's offer. Ensure that your team is aligned around company values and has clear strategy for when you pay and when you're flexible.

Influencer revenue sources



04

Partner Selection

Creator casting continues to evolve.

Marketers seek to honor social movements and apply their company's values to their influencer selections in 2021. Cultivating inclusive, equitable recruiting practices and policies for political content are priorities for the year ahead.

While marketers work with talent across all tiers, nano influencer activations were reported less often in 2020, signaling that **a reach of 10k+ is a key audience milestone for emerging creators.**

Engagement rates are still top of mind—**marketers' minimum desired engagement rates rose to 3.5%** (from 2.2% in 2019).

Other top considerations for 2021 are **brand fit (matching values and aesthetics), content quality, and target audience alignment.**

Partner Selection: The Right Fit

“I am *more picky* about who I collaborate with because I want them to *align with my stances on social justice.*”

—lifestyle creator
with micro audience
(10k-100k) who's
been an influencer
for 1-3 years

Partner Selection: Equal Opportunity

Diversity and representation in the influencer industry came under the microscope in 2020.

65% of creators believe that systemic racism is a problem in the industry.

21% of creators believe that brands are doing enough to be inclusive right now.

While some creators see marketers making improvements, the industry has a long way to go before we see truly consistent representation of BIPOC, LGBTQ and plus-size communities.

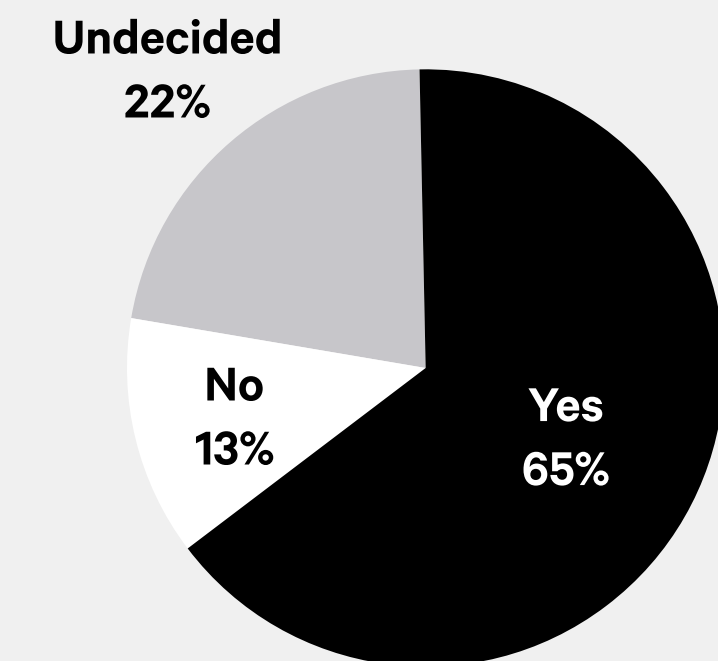
“We need more inclusive deals.”

“I believe that I have received more opportunities and higher pay because brands are trying to do better, but there is obviously room for improvement across the board.”

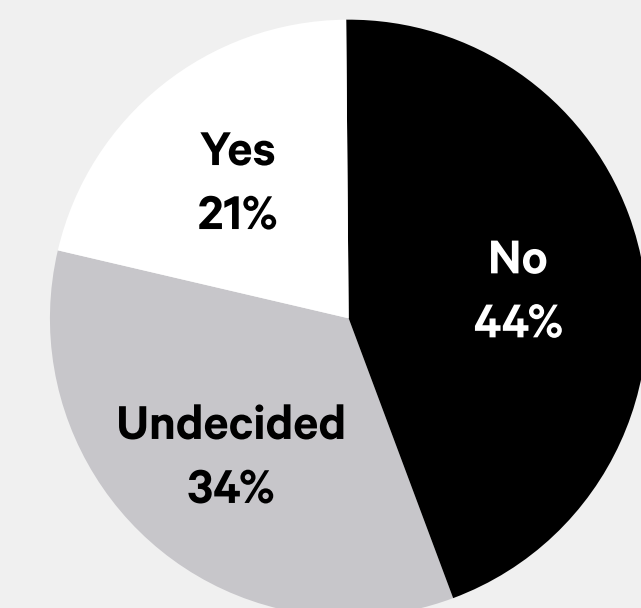
“I think there is a lot of performative activism from some large brands, but not for the sake of being more diverse—just to look good to their audience.”

Creator Perspectives

Is systemic racism a problem in the industry?



Are brands doing enough to be inclusive?



Partner Selection: Equal Opportunity

100% of marketers said they're willing to commit to contracting creators from under-represented communities for at least **50%** of their casts.

Takeaway: Marketers are raising the bar for inclusion and must stay accountable to these commitments by tracking diversity and community share of voice in their programs.

Partner Selection: Getting Political

Marketer attitudes toward creators who produce political content are mixed. If creator-partners share political content, **35% of brands want space between sponsored content and political messages.**

When we polled marketers in November 2020, **12% said that campaign disruptions tied to political and social movements were top of mind heading into the new year.**

In the wake of the social media–driven insurrection on January 6, 2021, it’s increasingly critical for marketers to set and reevaluate policies that protect them from controversial associations.

Takeaway: Protect your company with a robust creator agreement that governs conduct, and get ahead of crises by scenario planning—delayed responses heighten exposure.

Since many influencers use their platforms to support social justice and political movements, they are hyper-aware that their audiences may hold views across the political spectrum.

52% opted out of sharing political content entirely (even non-partisan messages).

30%

PRODUCED NON-PARTISAN
CONTENT TO ENCOURAGE
VOTING

18%

SHARED DIRECT PARTISAN
SUPPORT FOR THEIR 2020
PRESIDENTIAL CANDIDATE

8%

PARTNERED WITH A
POLITICIAN TO ENDORSE A
CAUSE/CAMPAIGN

Marketers’ attitudes toward creators’ political content





Collaborations

COVID-19 disrupted program strategies in 2020 and will continue to impact creator assignments in the year ahead.

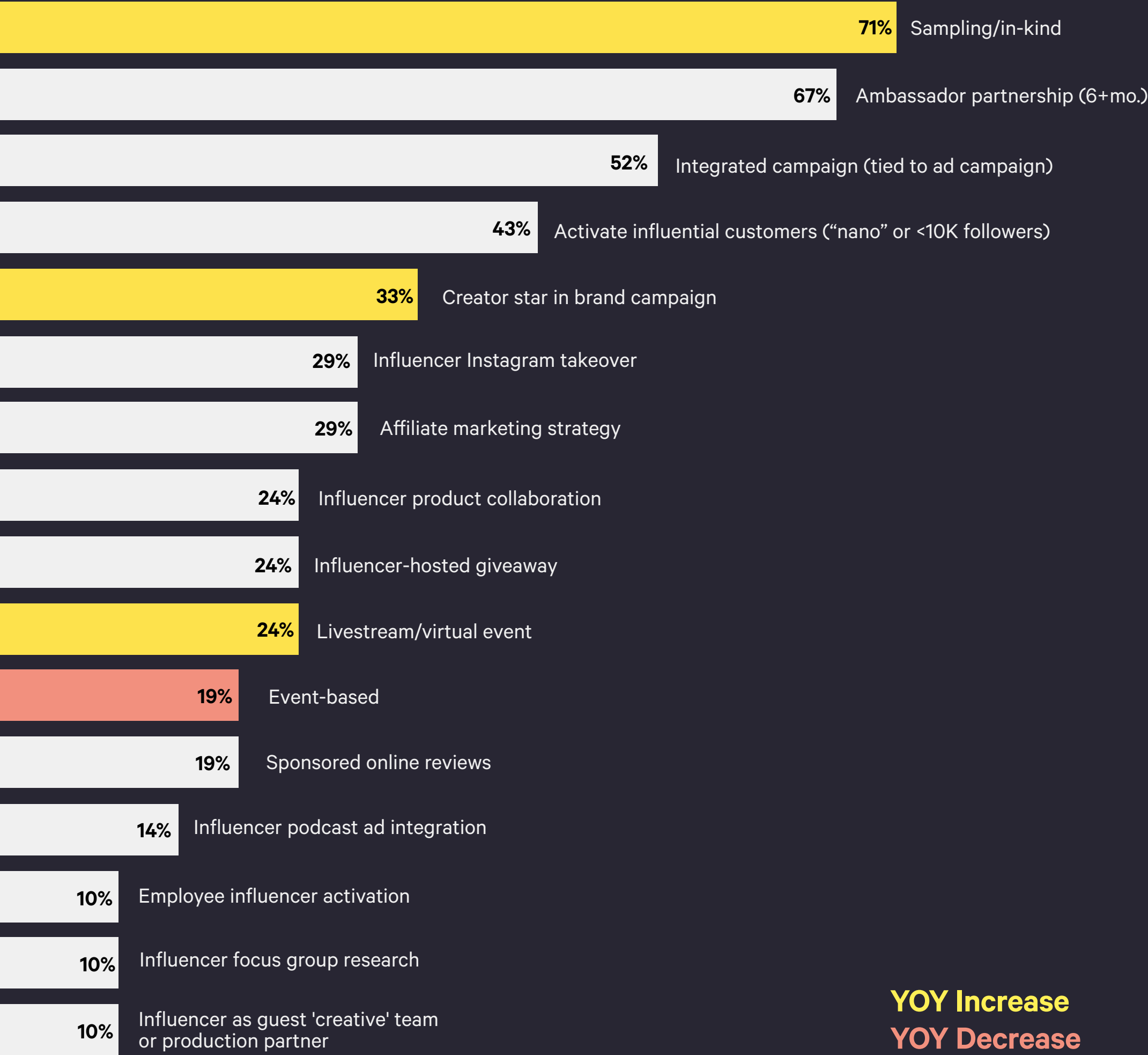
Marketers conducted an **average of 6 creator campaigns throughout 2020**, leveraging roughly 5 different activation strategies.

Collaborations: Strategies Shift

2020 was a year of pivots for marketers, and many shifted their budgets and strategies into different kinds of creator-led activations.

Generally, in-person events paused, while unpaid gifting, livestreams, and casting influencers in brand campaigns surged.

Marketers' 2020 influencer strategies



Collaborations: Partnership Preferences

Long-term relationships between brands and creators are increasing as the industry evolves. Brands gain efficiencies for quick-turn projects and influencers can rely on more consistent income.

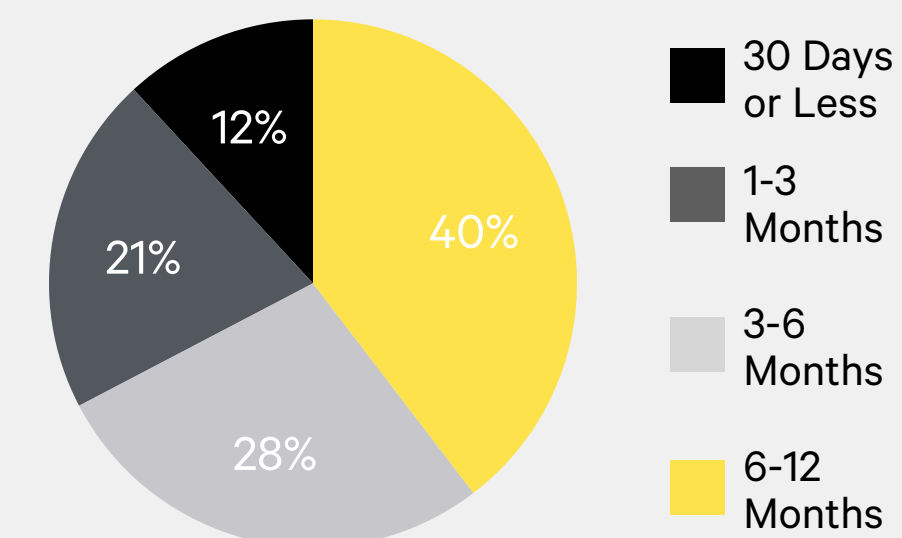
68% percent of creators prefer partnerships to last 3 months or longer.

53% of marketers sponsored collaborations spanning 6-12 months.

Takeaway: Align your priorities to reflect influencers' interests in long-term relationships—efficiencies and results will likely follow.



**Creators' partnership
length preferences**





Platforms

Social media-based marketing became even more important in 2020, and the platforms continued to evolve to serve advertisers and creators.

Brands still rely on Instagram as their most successful influencer channel, with YouTube and Facebook not far behind. There's growing interest in Instagram's e-commerce features and direct conversion tracking via Story Swipe-Ups.

TikTok and LinkedIn both made it on to more marketers' plans in 2020 and will receive increased investment in 2021.

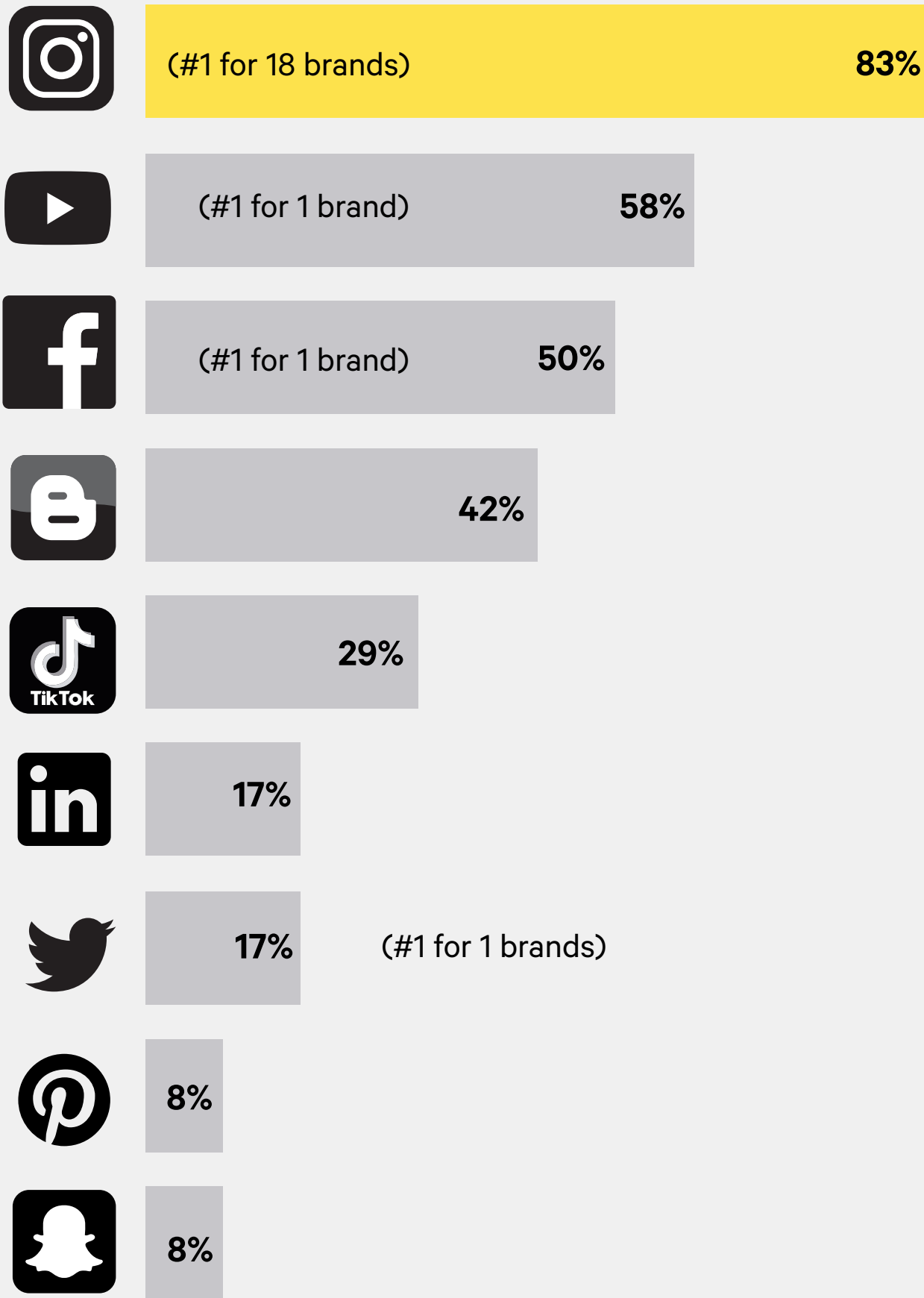
Platforms: Channel Trends

80% of the creators we spoke with consider Instagram to be their primary publishing channel. Though some creators no longer feel as concerned, 78% believe that Instagram’s algorithm negatively impacts their content business.

“You have to produce more content, and at a faster rate, to keep up.”

“I’ve come to terms with the algorithm. At times, my engagement is great. Others, not so much. I focus on generating quality content and worry less about the algorithm.”

2020 investments by channel



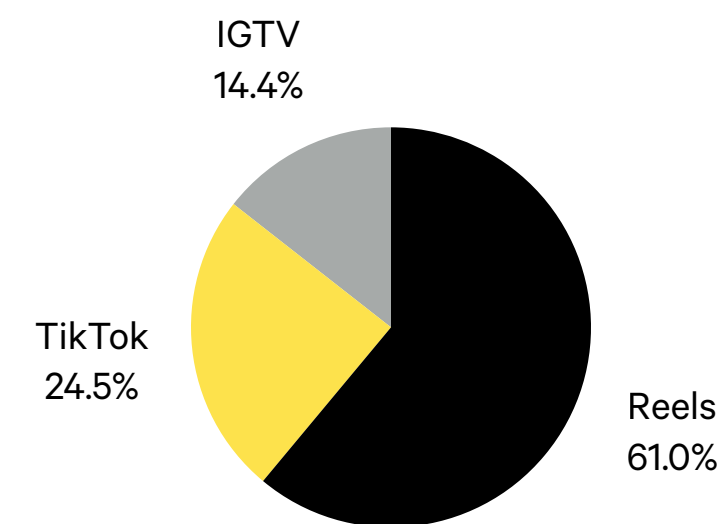
Platforms: Short-Form Video

Instagram Reels

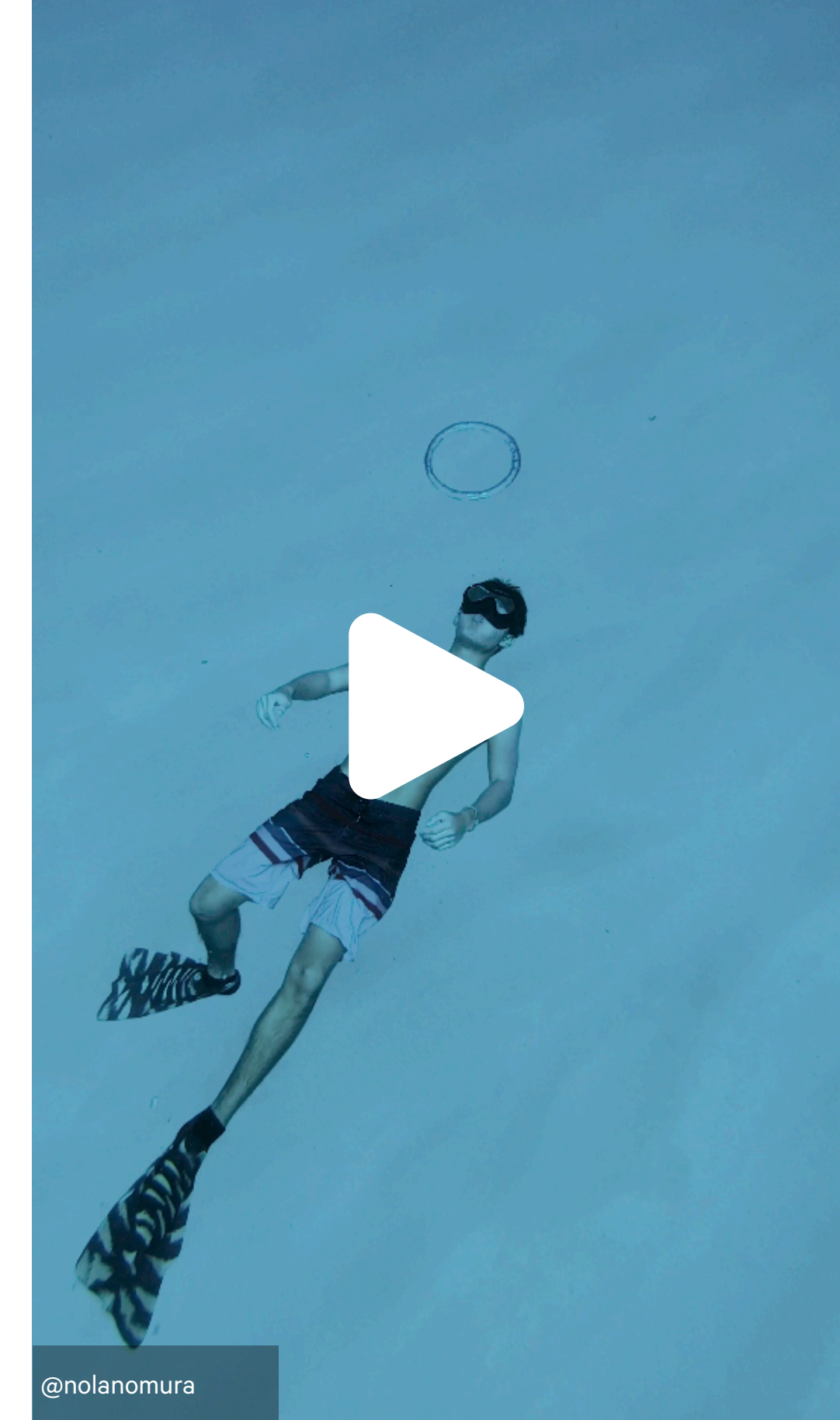
The influencer community embraced Reels in 2020. **57% percent of influencers tested** the format, and many cited audience growth as a result.

Meanwhile, only **25%** of marketers experimented with influencer partners on Reels in 2020. Marketers will likely continue to test and learn with the format in 2021, and they'll likely look to influencers as skilled suppliers (**60%** of creators cited Reels as their preferred format for short-form video creation).

Creators' preferred for short-form video format



“My reach grew thanks to the launch of IG Reels.”



Case Study: TikTok Launch



In 2020, more brands committed to growing their presence on TikTok. To create awareness for a footwear company's new channel, Gen Z creators made TikToks featuring custom sneakers designed via the brand's at-home creativity platform.

TikTok view rates reached as high as 43.54%, and the campaign earned an average view rate of 27.56%, surpassing relevant benchmarks by 20%.



Content Reuse

Brands are becoming more skilled with content reuse strategies.

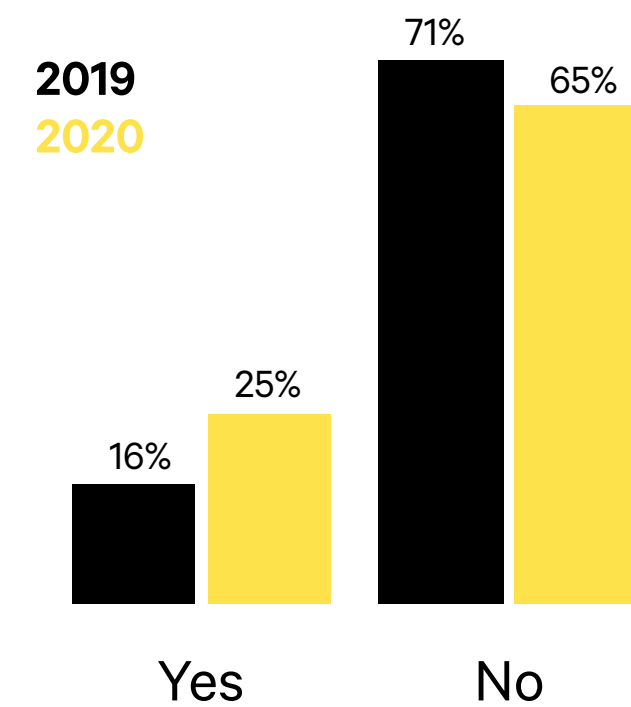
25% of marketers said their company uses influencer content to its fullest potential (**up 56% YOY**).

38% of marketers said COVID-19 disrupted their other marketing channels, so brands have had to make influencer investments work harder.

In terms of reuse formats, **creating ads with influencer content** eclipsed shares on brand social channels for the first time.

Content Reuse: Trends Within the Practice

Do you feel that your organization is leveraging influencer assets/images to their full advantage?



100% of marketers are willing to pay increased usage fees to extend negotiated content rights.

Content Reuse: Additional Investment

Paid boosting of influencer posts was marketers' #1 re-use tactic.

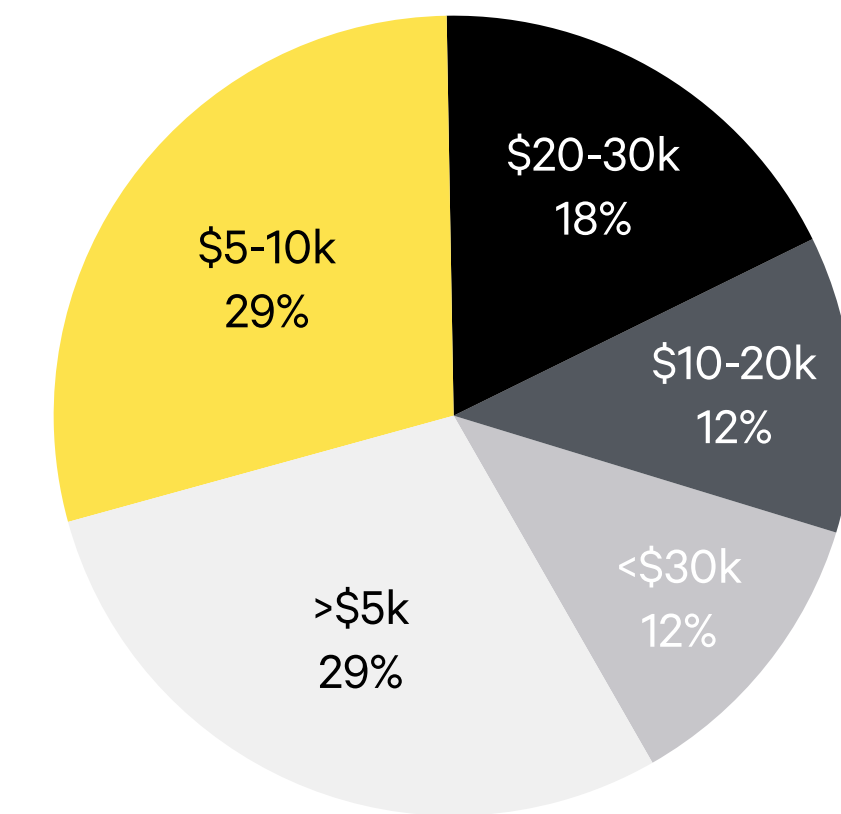
While **50%** of marketers use boosting to target key geographies, the most common boosting campaign goals are driving broad **awareness** and **purchase**.

52% of marketers regularly amplify content, and of those who do, **60%** spend less than \$10,000 per month.

Takeaway: Monthly boosting budgets are likely to increase, according to 61% of marketer respondents. This mirrors a trend we saw in 2020.

Marketers' boosting/amplification budgets increased nearly 2x in 2020.

Q4 2020 monthly
amplification budgets



Case Study: Purchase Campaign



A quarterly influencer conversion campaign for an outdoor adventure brand generated close to 500 purchases with a 28x ROAS (Return on Ad Spend).

Carousel ad formats generated 87% of total purchases, significantly outperforming single image ads—signaling the value of multiple photos to tell a compelling retail story.

Content Reuse: Creator Experience

Content licensing and usage is the **#2** influencer-reported driver impacting their rates (behind volume of posts + assets).

Influencer-reported licensing requests from brands:

- #1 Paid social ads/whitelisting
- #2 Organic social
- #3 Digital ads
- #4 Email
- #5 Retailer site

41% of creators “always” charge extra for whitelisting rights (giving brands access to their accounts), and **25%** do “sometimes.” **38%** of creators we spoke to have not yet participated in the practice.

25% of influencers say that they’ve felt uncomfortable with the way a brand used their content, and 11% believe misuse happens far too often.

Brand offenses range from the heavy-handed editing of post captions to inauthentic photo retouching to using content out of context or for unauthorized commercial purposes.



@steezykane

“They posted copy with my image as if it was me saying it. **ABSOLUTELY NOT COOL.** I had them take it down.”

“I feel forced to use language that is not in my voice. It is marketing speak.”

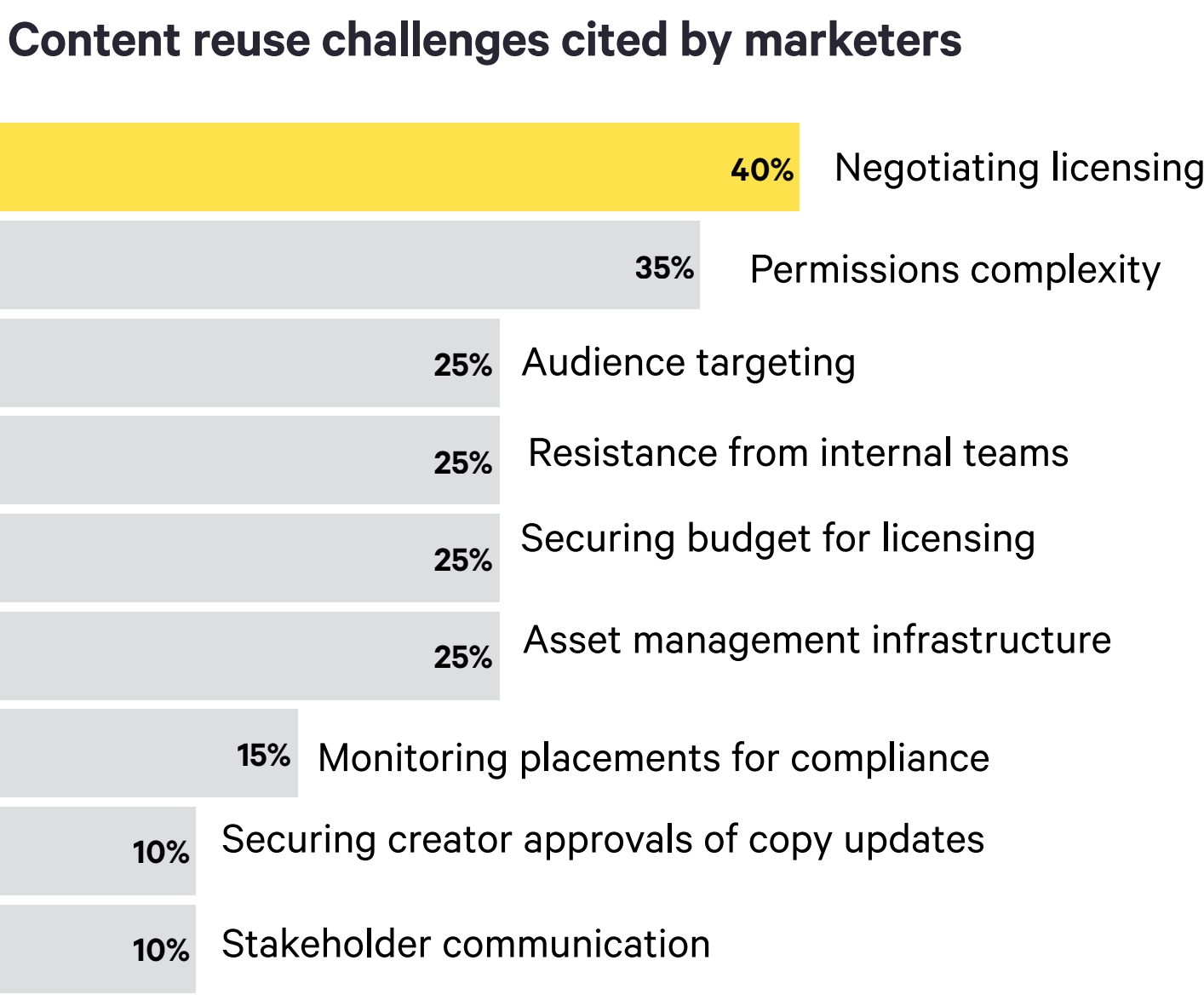
"My content is very high quality. More brands in the beauty space are willing to spend extra for usage."

Content Reuse: Reducing Risk

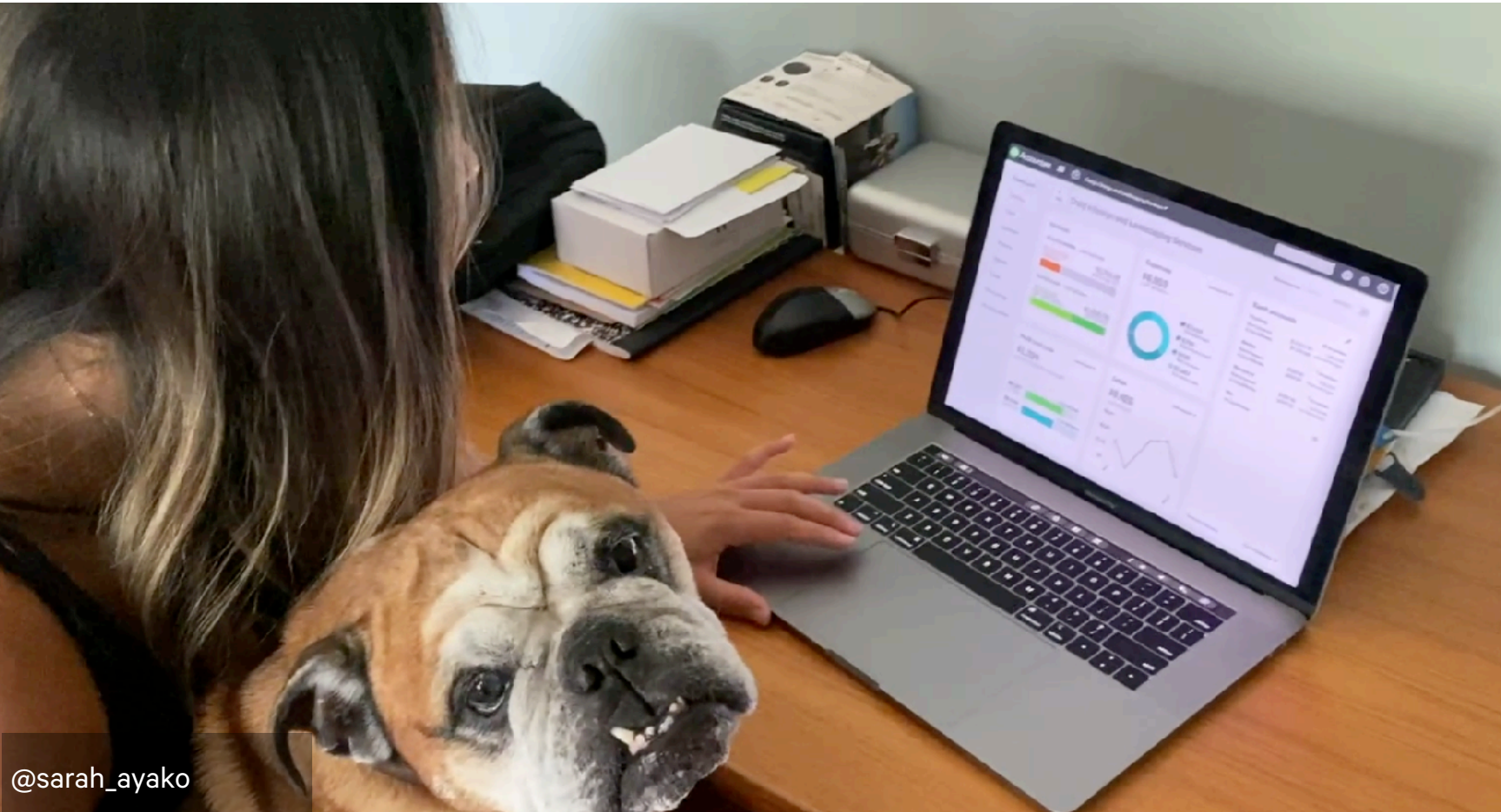
Amplifying influencer content via whitelisting can be **risky** for inexperienced brand teams. While exposure to new audiences is a benefit to creators, it can be a **liability** if the targeting is poorly executed.

Managing comments on "dark posts" is an emerging need in this practice. **58% of marketers are open to paying creators an incremental fee to provide the service**, while some see moderation as their responsibility.

Some creators refuse to have brand partners respond as them while others welcome help with deleting or hiding comments on their behalf.



“My content was whitelisted and the targeting was awful. I had to spend so much time deleting rude comments and defending myself. I don’t think I’ll ever do that again.”





Negotiations

Career content professionals know the value of their endorsements and work hard to constantly improve the quality of their content. Rates are increasing as content formats evolve and reuse requests expand.

Yet creators almost always expect to **negotiate**. 75% said they're "somewhat flexible" with their rates while 23% said "very flexible".

Negotiations: What Goes Into Rates

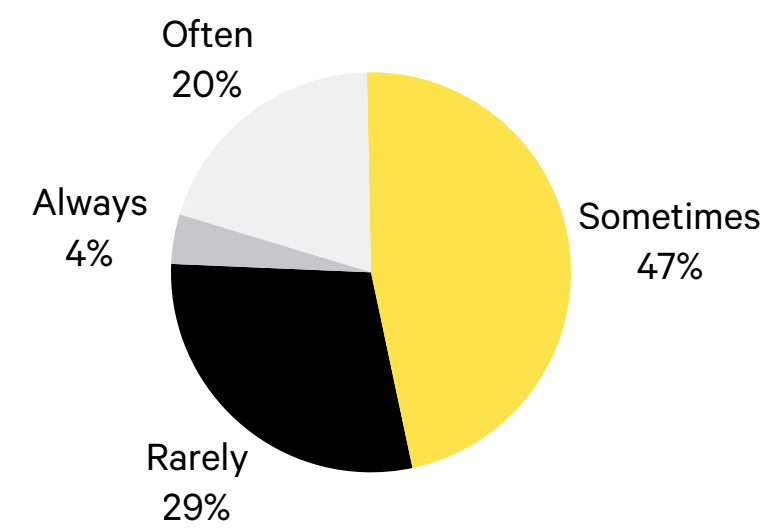
The **#1** reason that creators seek out agents and managers is for their ability to negotiate higher rates.

Not having to negotiate as aggressively is a top-most request among creators, so consider how your brand can show up and create a positive experience (like covering transaction fees or providing faster payment schedules).

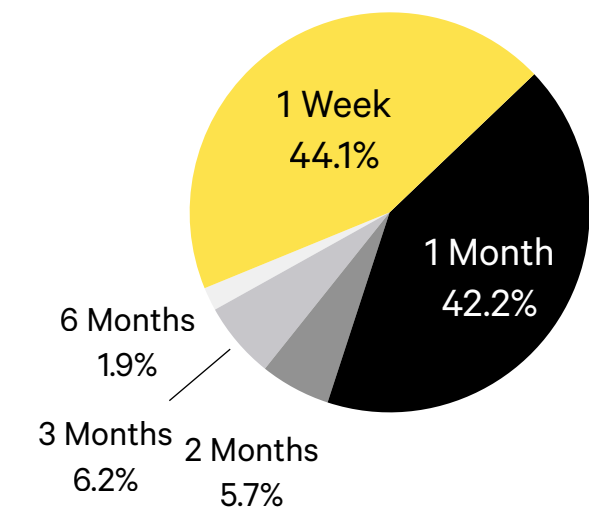
Takeaway: Gut check your compensation strategy and deal terms to consider the value exchange and creator experience. Consult Collectively's blog for contracting tips from our attorney.

58% of influencers negotiate for brands to pick up payment transaction fees.

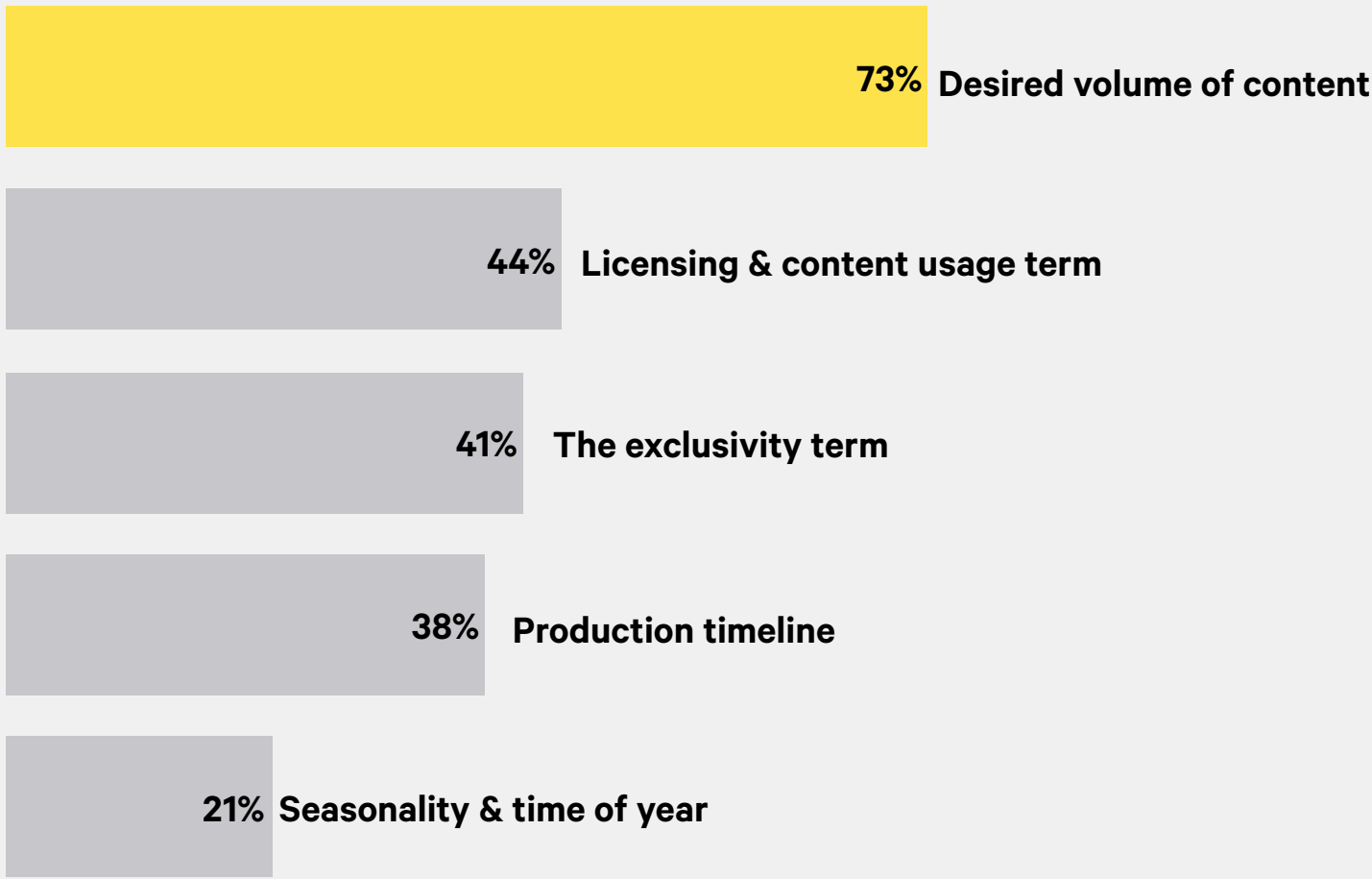
Frequency by which brands request exclusivity of creators



Amount of time creators agree to be exclusive at no extra cost



Influencer-reported cost drivers





Performance Measurement

From content creation to word-of-mouth endorsement, creator-based programs support an **average of four distinct brand goals**.

Identifying those goals is the first step to building a meaningful measurement approach.

Performance Measurement: Beyond a Single Model

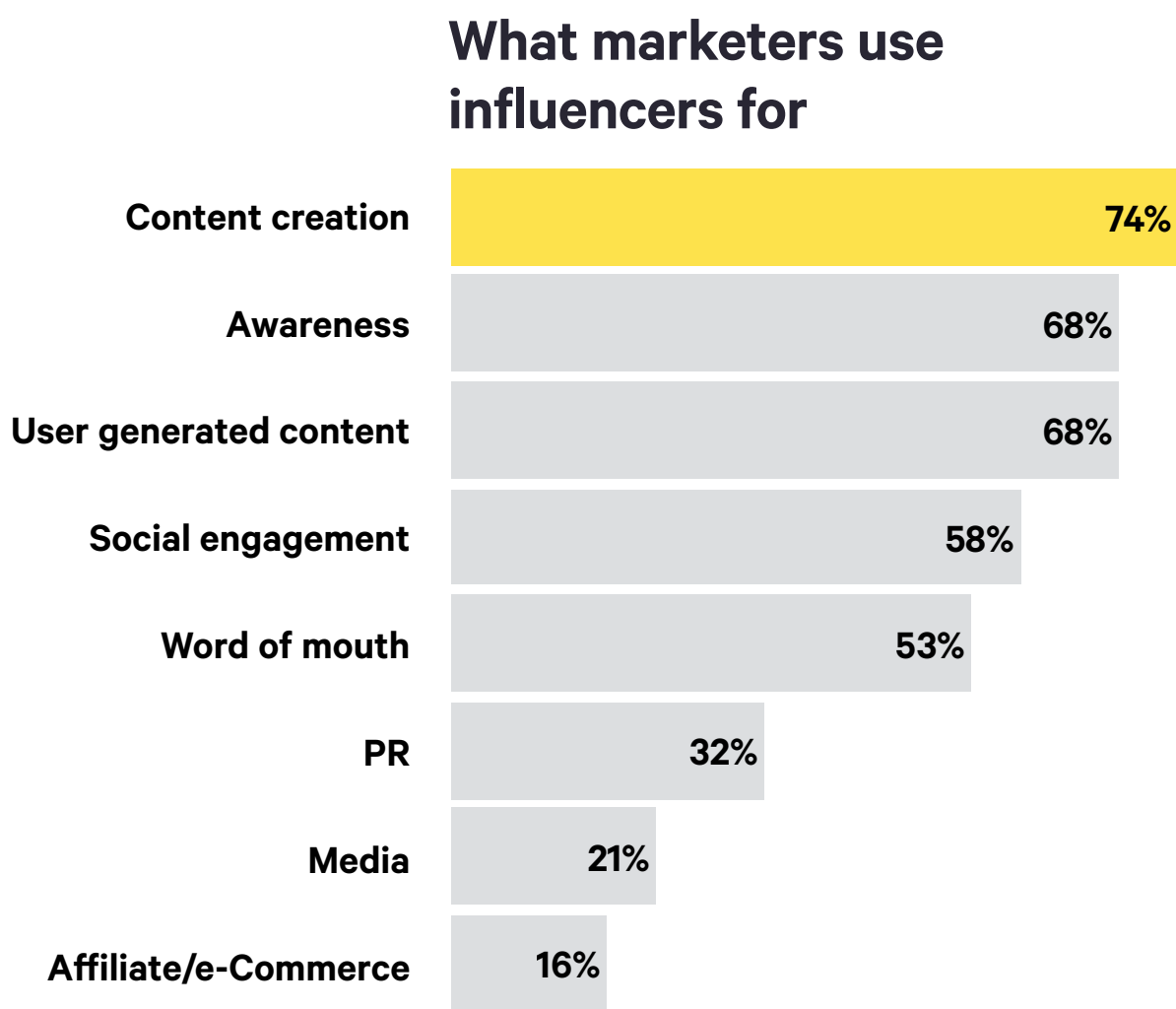
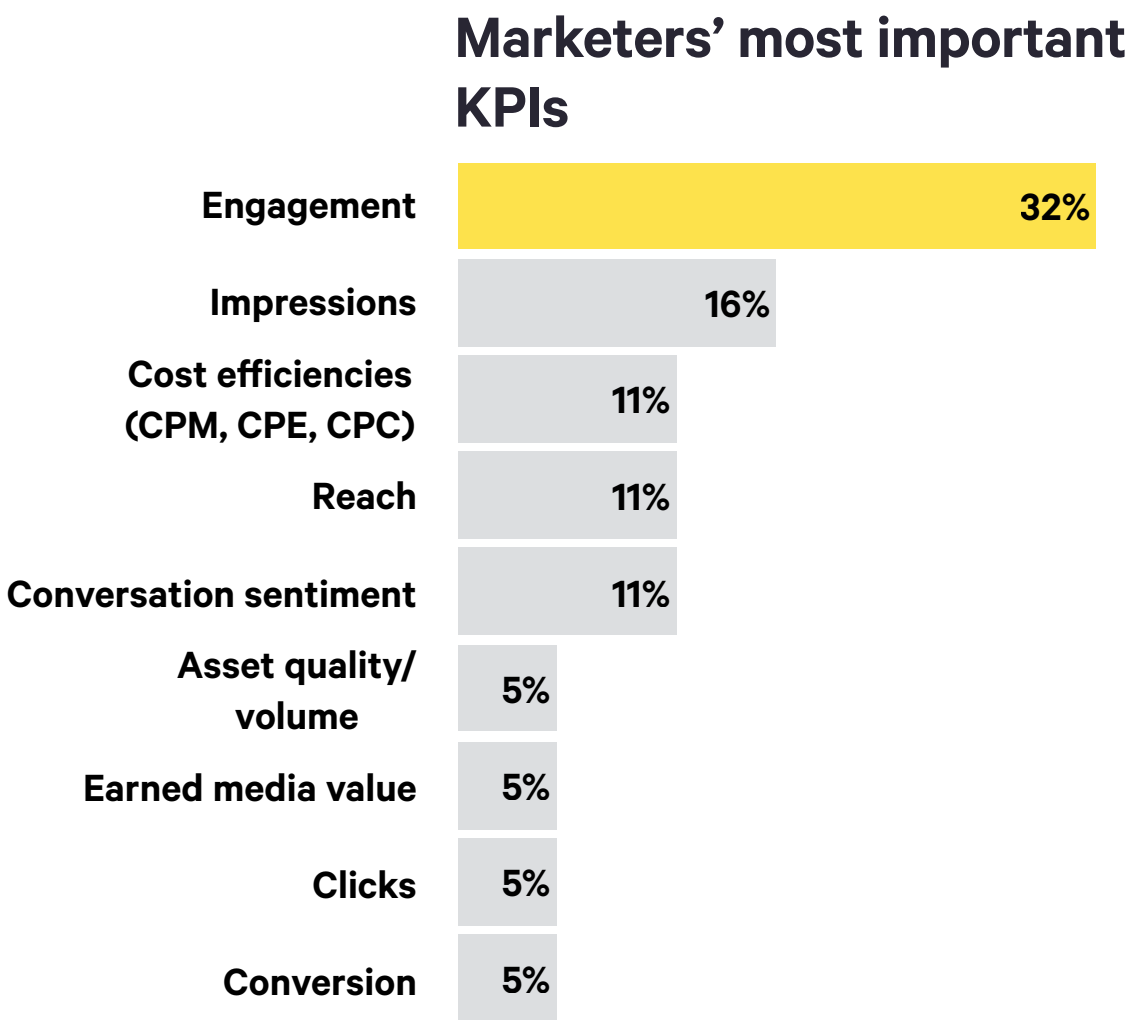
Within the industry, there’s general consensus that engagement, impressions, reach, sentiment and clicks are very important KPIs.

Yet when it comes to the single most important measurement criteria, there is an enormous range of perspectives.

9 different KPIs were cited by marketers as the most important.

What marketers are saying:

“We've learned influencers are a great way to tap into new audiences that we don't have the tools or reach to target.”



Performance Measurement: Progress Over Perfection

32% of companies shared that they have an ROI framework.

This is consistent with findings in previous years, suggesting **there has been no meaningful progress in ROI modeling on the brand side.** New platforms, content types, and features compound the complexity.

Identifying an ROI approach requires an attitude of “test and learn” to uncover a winning strategy. It’s important to find what works for your brand and home in on that.

How some marketers calculate ROI

“Total impressions for month + ROAS”

“We look at paid amplification metrics and also compare to internal social media benchmarks.”



Case Study: Program Evaluation

In a 12 month study of performance data from a consumer electronics brand, we set out to uncover whether long-term partnerships generated higher ROI.

By creating control groups and isolating metrics over time, we quantified and confirmed the value of ongoing influencer partnerships. The brand’s most important KPIs (engagement rate and comment relevancy) improved by 21% and 600%, respectively.

Engagement Rate	Comment Relevancy
Q1-Q2: 4.23%	Q1-Q2: 6.14%
Q3-Q4: 5.13%	Q3-Q4: 44.13%

10

Appendix

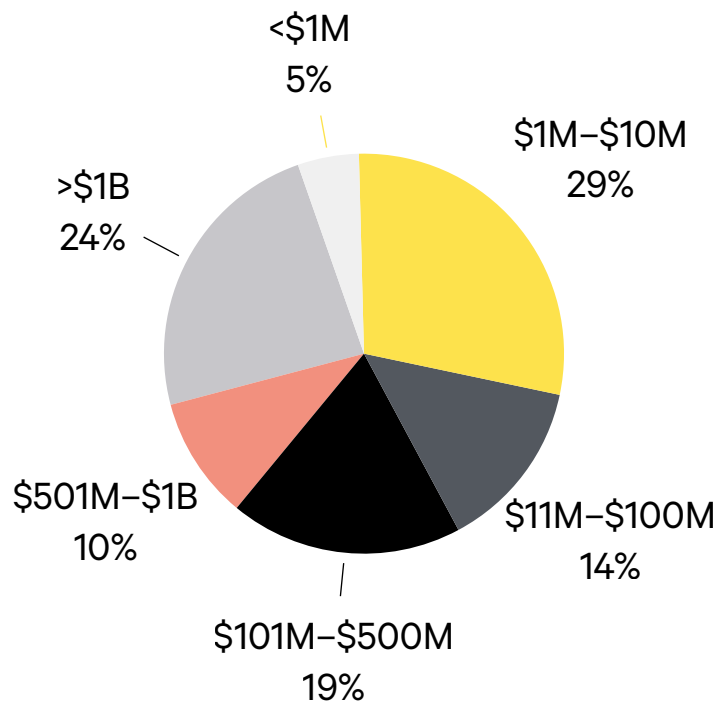


Appendix: Respondent Overview (Marketers)

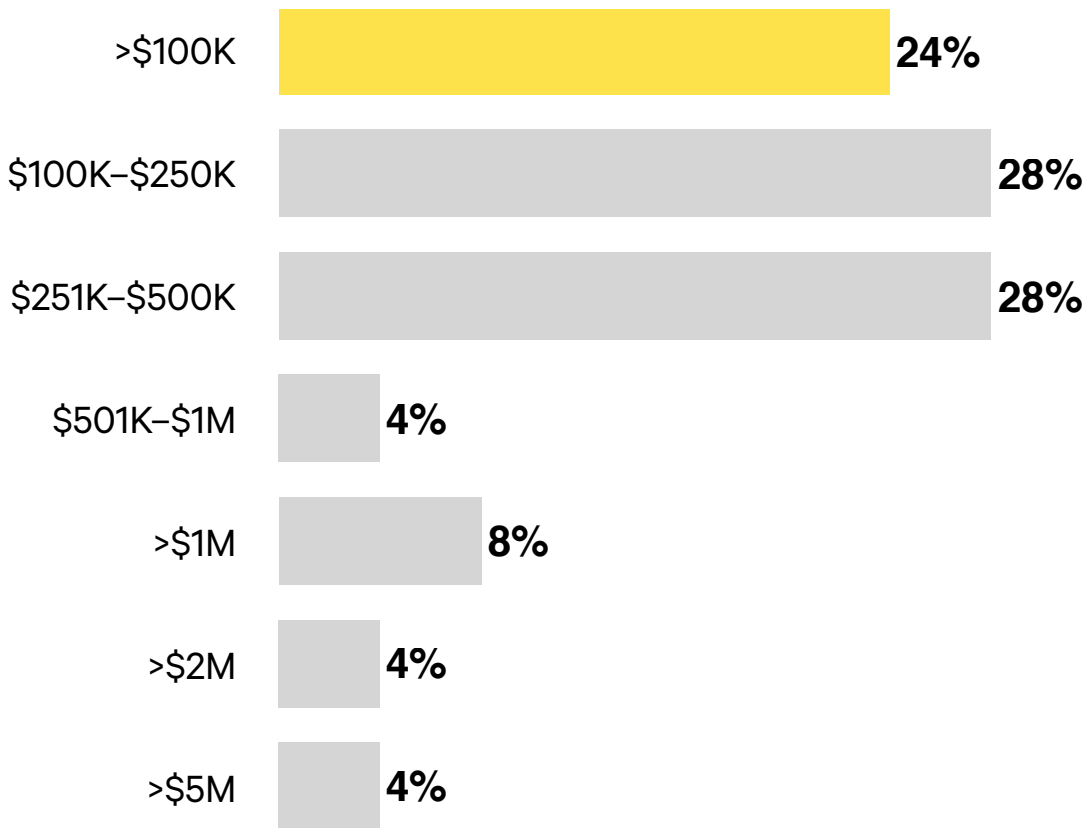
Total participants

26

2020 revenue



2020 influencer marketing investments



Industries

15

58%
HAVE IN-HOUSE
MARKETING TEAMS



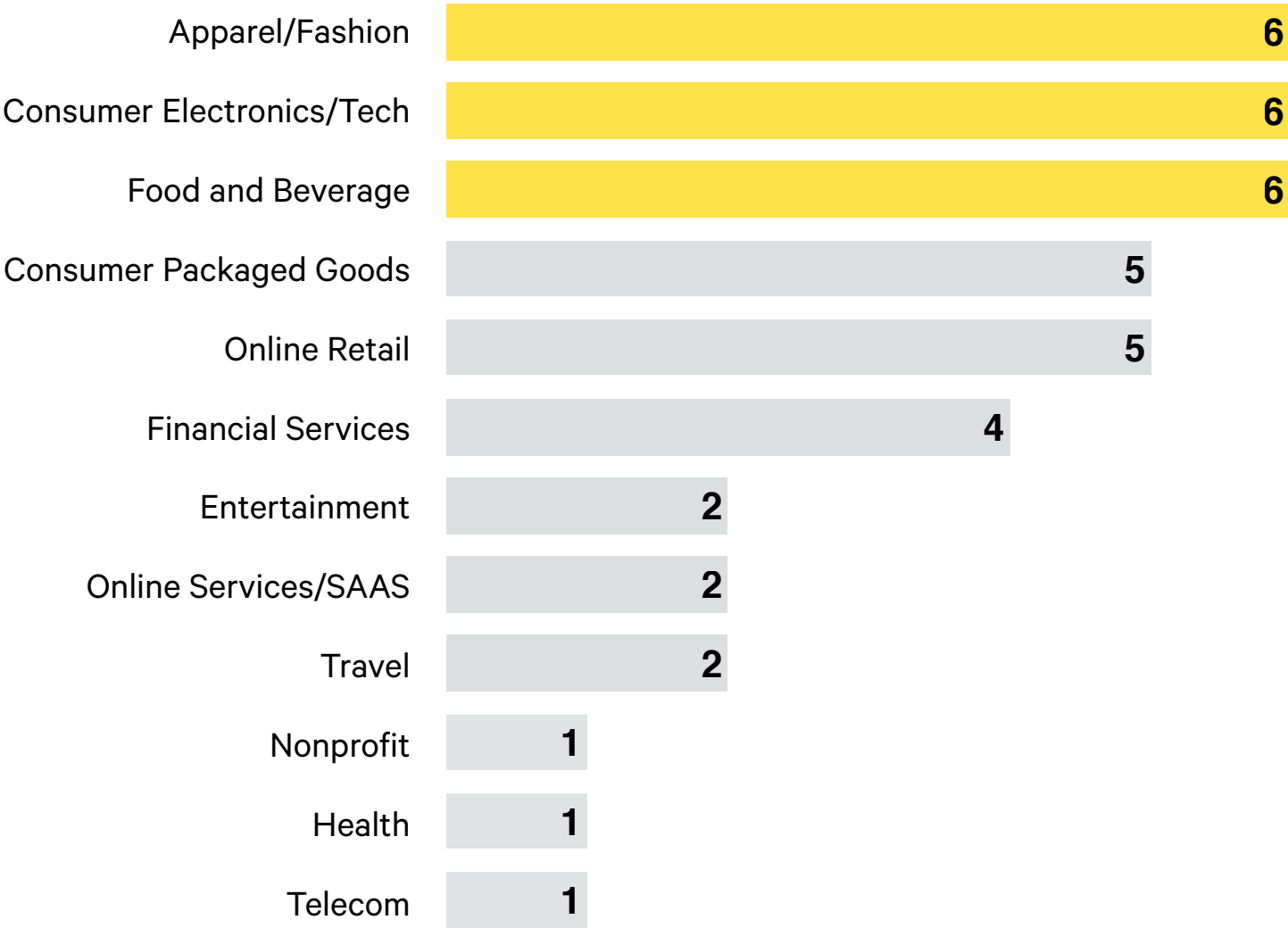
54%
WITH IN-HOUSE TEAMS
USE INFLUENCER
AGENCIES TO SCALE

67%
WORK WITH AN
INFLUENCER AGENCY



50%
DON'T HAVE AN INTERNAL
INFLUENCER TEAM

54%
WORK WITH 2 OR MORE
INFLUENCER AGENCIES



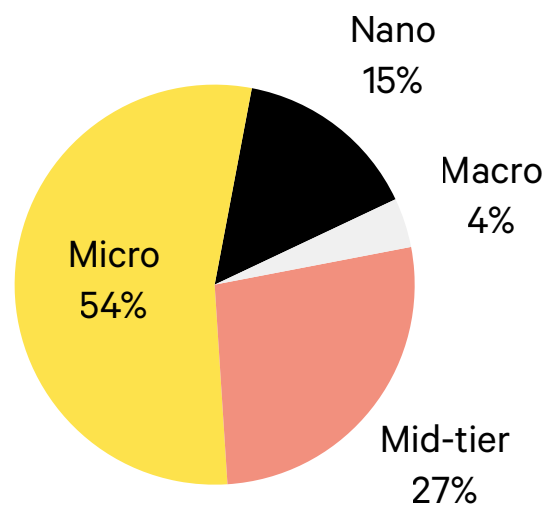
Appendix: Respondent Overview (Creators)

Total participants

385

Classification by follower count

Nano: <10K
Micro: 10K-100K
Mid-tier: 100K-500K
Macro: 500K+



Average years of experience partnering with brands

3 years

80% do not have an agent.

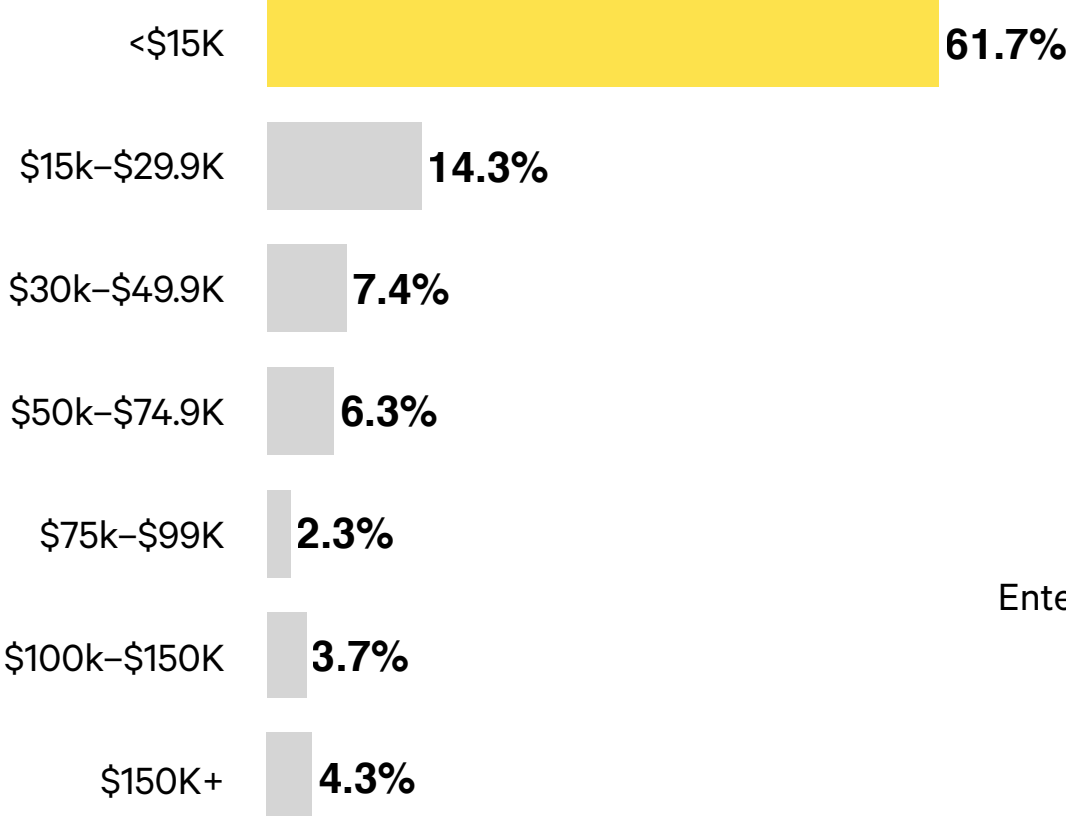
36% full time content creators.

64% have a day job.

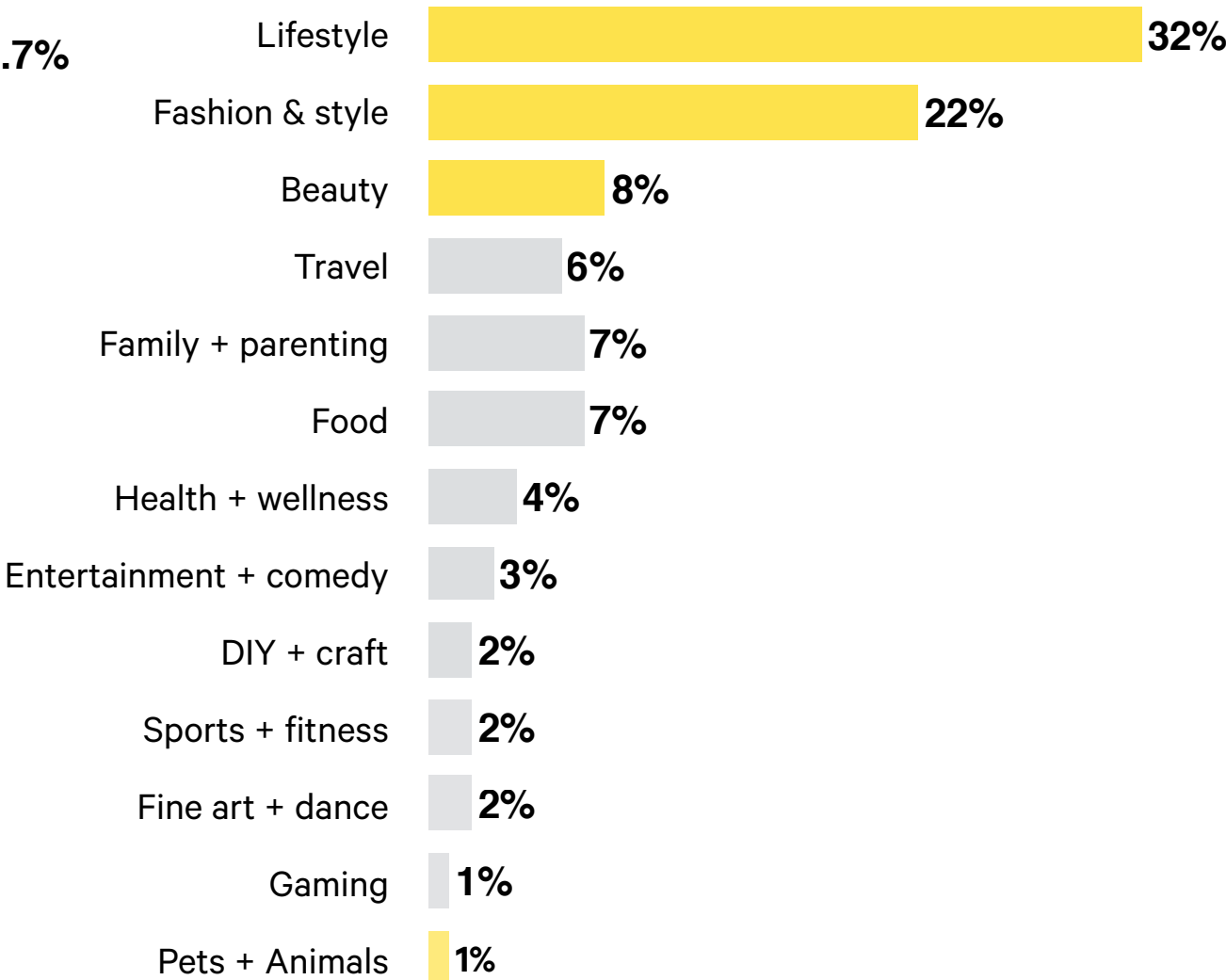
With an average audience reach of

131,491 fans

2020 revenue



Verticals



Appendix: Contact & Sources

Questions, comments, or just want
to chat? We'd love to hear from you.

Brands:

Interested in our complete social influence practice?
Connect with our New Business Team:
new@collectivelyinc.com

Creators:

Want to collab with our brand partners?
Sign up on our website and be in touch:
community@collectivelyinc.com

Follow us online:

 [@collectivelyinc](https://www.instagram.com/collectivelyinc)

 [@collectively-inc](https://www.linkedin.com/company/collectively-inc)

 [@collectivelyinc](https://twitter.com/collectivelyinc)

Subscribe to our monthly newsletter for trends
and analysis: collectivelyinc.com

Sources:

“Social Networks See Boosts in Engagement Among Users,
but not Equally” ([eMarketer](#))

“Influencer marketing and social change” ([Collectively Blog](#))

“The New Influencer Capital of America” ([New York Times](#))

“Black influencers are underpaid, and a new Instagram
account is proving it” ([The Verge](#))

“Our Commitment to Diversity, Transparency, and
Accountability” ([Collectively Blog](#))

“What happens when a major beauty influencer supports
the capitol mob” ([Glossy](#))

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