HypeAuditor x Sampleo (Webedia Group)

Global and Regional Instagram Influencer Ad Spend Before, During and After COVID-19

DATE:

01 / 09 / 2020

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About HypeAuditor

HypeAuditor is a SaaS company offering complex solutions to brands, agencies and platforms working with influencers.

HypeAuditor has developed a comprehensive set of tools to discover and compare influencers on Instagram and YouTube, verify the authenticity of their accounts and track the results of influencer marketing campaigns.

All services are based on machine learning and artificial intelligence. The two enable the identification of behavioural patterns on the basis of which the algorithm draws conclusions. HypeAuditor's goal is to provide the ultimate analytical services to ensure that brands and agencies work effectively with creators.

The company is about to launch a Research Hub where clients will be able to obtain analytical insights into trends in the industry of choice, view the practices that brands and agencies are implementing, and consequently develop their influencer marketing strategy based on market needs and practices.

About Sampleo, Webedia Group

Sampleo (Webedia Group) is an Influencer marketing agency specialized in nano, micro and mid-influence solutions -respectively under the name of Sampleo and Talent Web Academy. In 2018, the startup joined Webedia Group, a major French actor of the entertainment industry. The collaboration was made to complete an offering that was then, mainly dedicated to top influencers.

With Sampleo in the group, Webedia is currently the only actor on the market to address every level of influence in France to help brands grow according to their needs. Webedia is also one of the main worldwide company in the influence sector.

Sampleo's expertise now translates in more than 16 countries thanks to its tailor-made campaigns, its targeted strategies and its consumer-centric approach. We help companies from all sectors to develop brand awareness and sales.

Its database currently counts +1,4M profiles worldwide working with more than 1,000 brands.

Introduction

Why this study?

These past 6 months haven't been easy on influencers and certainly haven't been easy on the Influencer Marketing business itself. If content consumption records a rise of 60% during COVID-19, the budgetary cuts are also there to nuance this high in activity. To say the least, adapting media plans and strategies have been (and will be) quite the challenge.

Why now?

Now that the first wave is over, HypeAuditor and Sampleo thought **it was high time to get to the reality of the real figures from real verified Influencers' accounts.** The COVID period has drawn **lots of debates** regarding the use of remunerated Influencers. They definitely helped to build **consideration** when brands were hesitating about how to communicate. The biggest drive for brands was to use Influencers to show good intent, support and understanding to the situation, but also, to keep e-stores up and running.

This study focuses on 6 active markets **US, UK, Spain, Germany, Spain, Poland** as they spent differently their budgets on Instagram ads. A good way to see how remunerated partnerships were practiced before, during and after the bewilderment of the pandemic in 6 different contexts.

Finally, HypeAuditor and Sampleo shared your questions on the future of Ad Spend. And this was also quite a drive to lead this research. We are, after all, an industry driven by our consumers and data -and data on them we need!

We wish this study will help you find answers to these questions that were ours too:

What really happened on Instragram these past 6 months?
What is the Instagram Influencers state of mind?
What type of partnerships to seek with Influencers in 2021?
To what extend formats have been impacted?
Are the partnerships more expensive now?
Which brands gained from the process and how?

Methodology

In order to understand what 2021 holds for marketers and brands on Instagram HypeAuditor and Sampleo decided to gather one years' worth of data to draw an accurate landscape of the Ad Spend on Instagram before, during and after COVID-19.

To estimate the market size in 2019, we've analyzed **over 3M posts** that were marked as sponsored:

US	2 371 232
UK	379 126
Germany	230 496
France	271 975
Spain	177 551
Poland	42 736

What is a sponsored post according to our study?

A "sponsored post" is an influencer's post with brand mentions that was posted on a paid or a barter basis when an influencer receives a product or services from a brand in return for publication.

On topics per Country Methodology

To reveal which topics were growing in popularity, we looked at accounts belonging to different categories to see which ones had gained more new followers than others.

Methodology:
For all accounts with an audience in this country, the number of significantly increased accounts was considered. An account with a significantly increased number of followers was considered to have increased by 20 percent or more in the 3 months of the pandemic. Further, the accounts that grew for this top tier were divided by the total number of accounts with this top tier to see how many accounts for this top tier had grown strongly in those three months.

The final top was made in descending order of this percentage, provided that the number of accounts in the top was at least 20 (the opposite cannot be relied on the fact that this percentage is representative).

Key Findings

Global state key finding

Global figures are impacted a lot by the US Influence market which stands for **38% of the market** and is a well-developed business, in comparison to friskier countries.

A thorough local focus is therefore important to have a real sense of the way each country handled, at its own scale and pace, the ups-and-downs of the crisis.

Categories key finding

Looking at the the biggest ad spenders during the COVID period, we find a mix of **entertainment industries** (Tik Tok, Spotify) which was expected in a lockdown context. Surprisingly, **garnement** (H&M) and **luxury** (Gucci) also made effort to maintain visibility even though their brick-and-mortar stores were closed – which shows optimism.

Looking at the global figures, the huge drop we expected from the COVID period remain quite limited. A slow and gradual recovery has started, a cheering prediction for 2021.

HypeAuditor Sampleo.

#1. 2019: The Starting Point

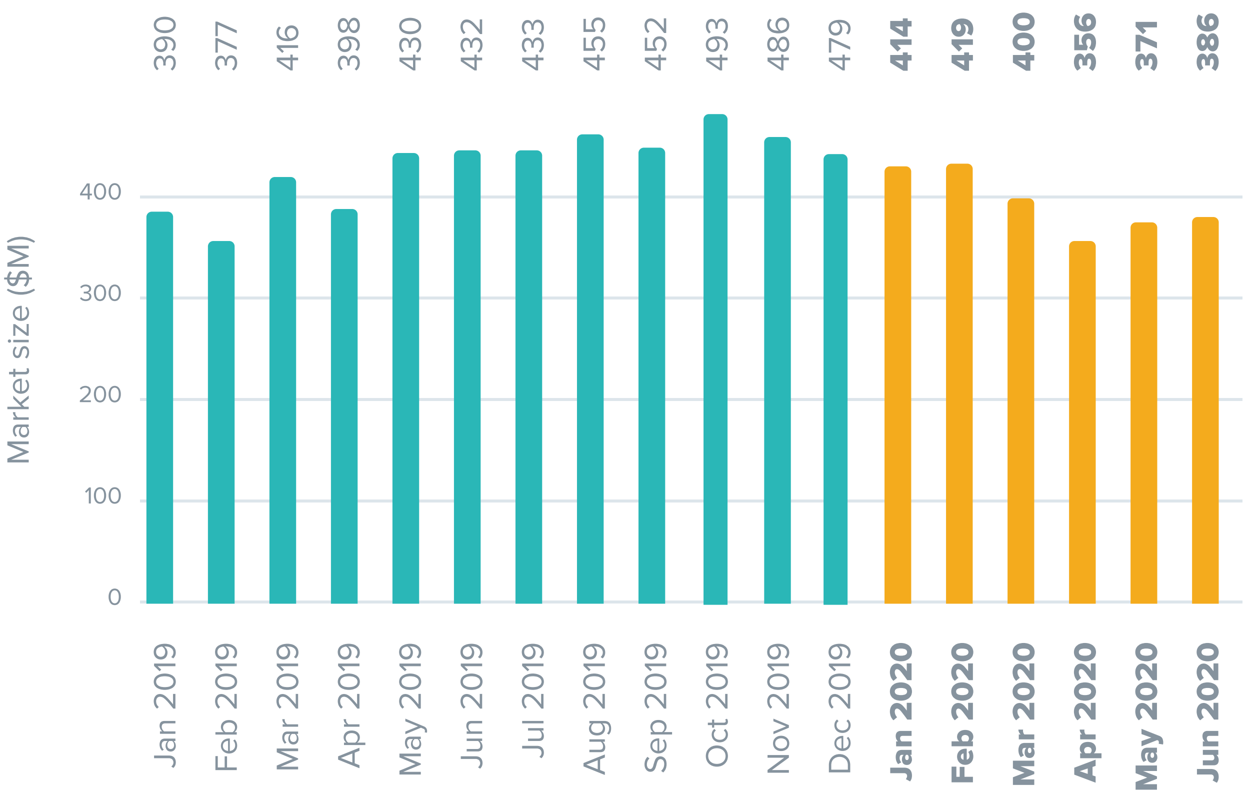
How big was the Influencer Market right before COVID?

In the middle of March 2020 the global influencer marketing community witnessed the decline of the industry due to the outbreak of COVID-19 pandemic. HypeAuditor and Sampleo decided to take a look at the evolution of the market before the start of the pandemic to assess its size and therefore, **a starting point.**

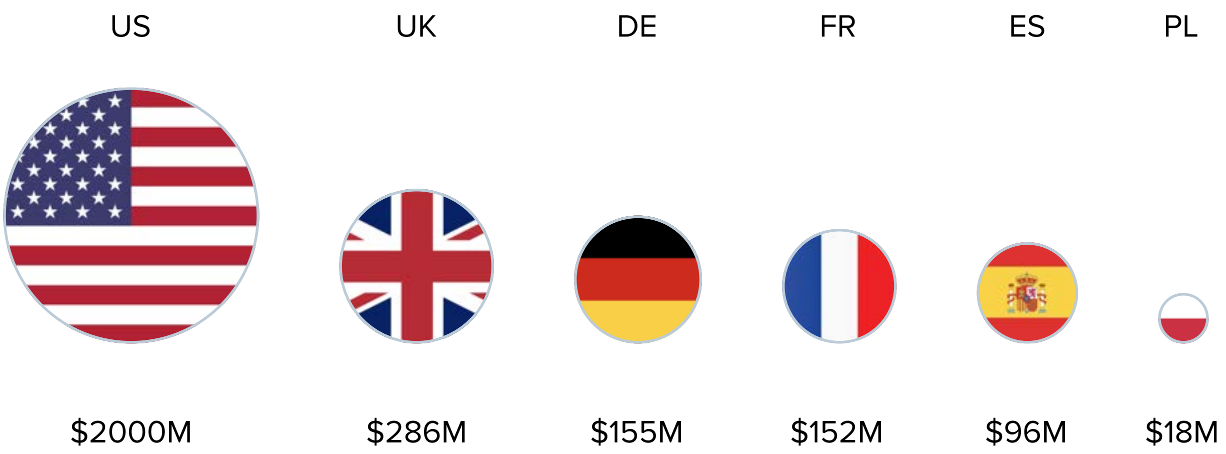
At the beginning of the year 2019 the Instagram influencer marketing market size was equal to **$390,8M** and throughout the following months, kept expanding.

October, November and **December** of 2019 turned out to be the most fruitful months for advertisers workings with content creators which can be easily explained by the big number of holidays in this time period. The figures show that globally the market reached $493,3M, $486,7M and $479,3M subsequently in the three months. If compare the early months of 2019 and the ones 2020, the results are approximately same - $414,1M, $419M and $400,4M in January, February and March 2020. Overall the market size fluctuated in the range from $377,6M to $493,3M. Comparing March 2109 and 2020, we see **the difference of $15,8M** with the results for March 2020 being smaller due to the COVID-19 outbreak.

Global Instagram Influencer Market Size Before COVID



The Instagram influencer market size in 2019



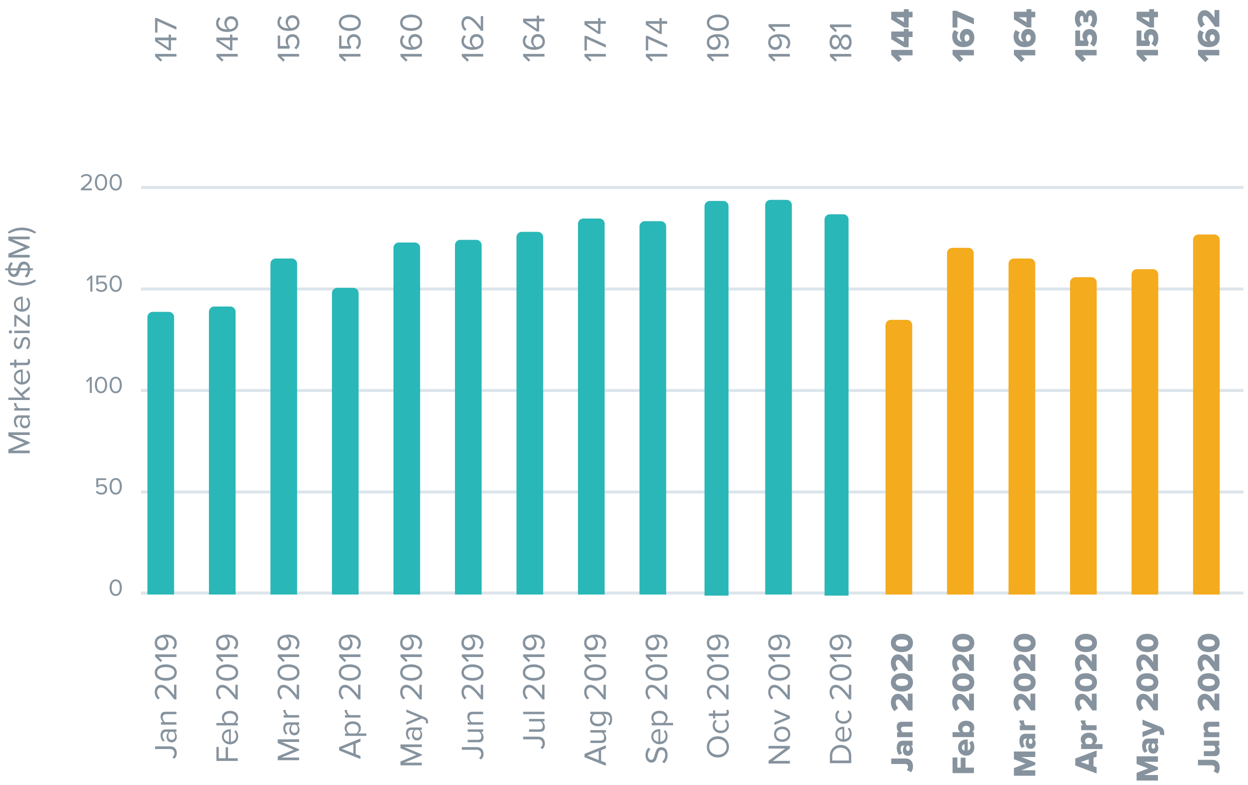
N.B: Note that the USA is the market that is the most developed and mature of the study. The results from this territory therefore impacted the overviews provided in this study. We thought this forward note was needed right from the start.

US Market Capitalization

The US market reached the biggest capitalization in **November 2019** – **$191,9M.** As for the media count, the biggest number of sponsored posts and stories happened in October and November. These are, of course, festive holiday season with budget spent on Halloween and Thanksgiving -more than Christmas.

If a small decrease is shown in March 2020, the full impact of COVID-19 is expected to be revealed with a delay that echoes the ongoing evolution of the economic crisis, which could impact global figures mainly.

In fact, the US market is the biggest one in terms of investments into influencer profiles among the six countries in the research.



Sampleo.

Results of the top spenders: US

16 Jan — 15 Jul, 2020

	Daniel wellington	H&M	Netflix	Gucci	TikTok
Brand	@danielwellington	@hm	@netflix	@gucci	@tiktok
EMV	$1.2M	$1.4M	$27.4M	$3.9M	$13.5M
Reach	19.4M	40M	466M	104.2M	313.5M
Influencers	797	5458	15498	5786	16346
Mentions	3072	11714	29312	12206	35702
EMV Sponsored and likely sponsored	$252K	$303.7K	$7.7M	$1.2M	$2.53M
Influencers (sponsored and likely sponsored)	425	432	1507	555	1493
Sponsored+likely sponsored mentions	911	802	2053	989	2500

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Strategy of the top spender in the US - Netflix

Target Audience

38.2% United States
Top country

41.4% 25-34 y.o.
Top age

58.5% Female
Top gender

Sponsored Influencers Insights

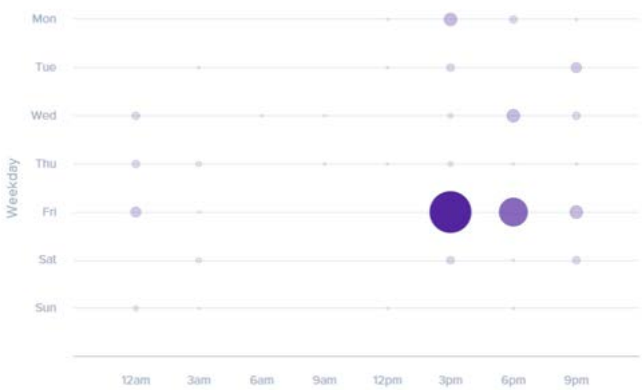
21.8% Cinema & Actors/actr...
Top category

19.4% 20K-50K followers
Top size

Video/Image distribution

Video	23	24.0%
Image	73	76.0%

Breakdown of mentions by weekday and time



Most Engaged Posts

Most Liked
66.9K

66.9K likes • 1.1K comments • 1.79% ER

@demibagby Be unstoppable! How many rounds can yo u do in a minute?! Show me by tagging #warriornunchallen ge 💪 Get inspired by a squad of demon-hunting nuns in...

Most Commented
921

5.2K likes • 921 comments • 2.19% ER

@amazinggraciedoodle #ad Space Force is on a mission t o achieve total space PAWMINANCE! 🚀🐾 (A totally legiti mate and extremely important part of total space domina...

Highest ER
25.74%

4K likes • 127 comments • 25.74% ER

@courtleees Thank you, @netflix, for bringing us Tiger Kin g 🐯 Outfit ✨ Set @felinaintimates #FelinaIntimates #FitB yFelina #WorkHardRelaxHarder discount code: COURTIE...

Trending Topics per Country: The US in March-May 2020

Top 10 categories with growing accounts:

- Finance and Economics (n.1)
- Computers and Gadgets
- Business and Careers
- Science
- Comics and Sketches
- Adult Content
- Management and Marketing
- Kids and Toys
- Humor, Fun and Happiness
- Shows

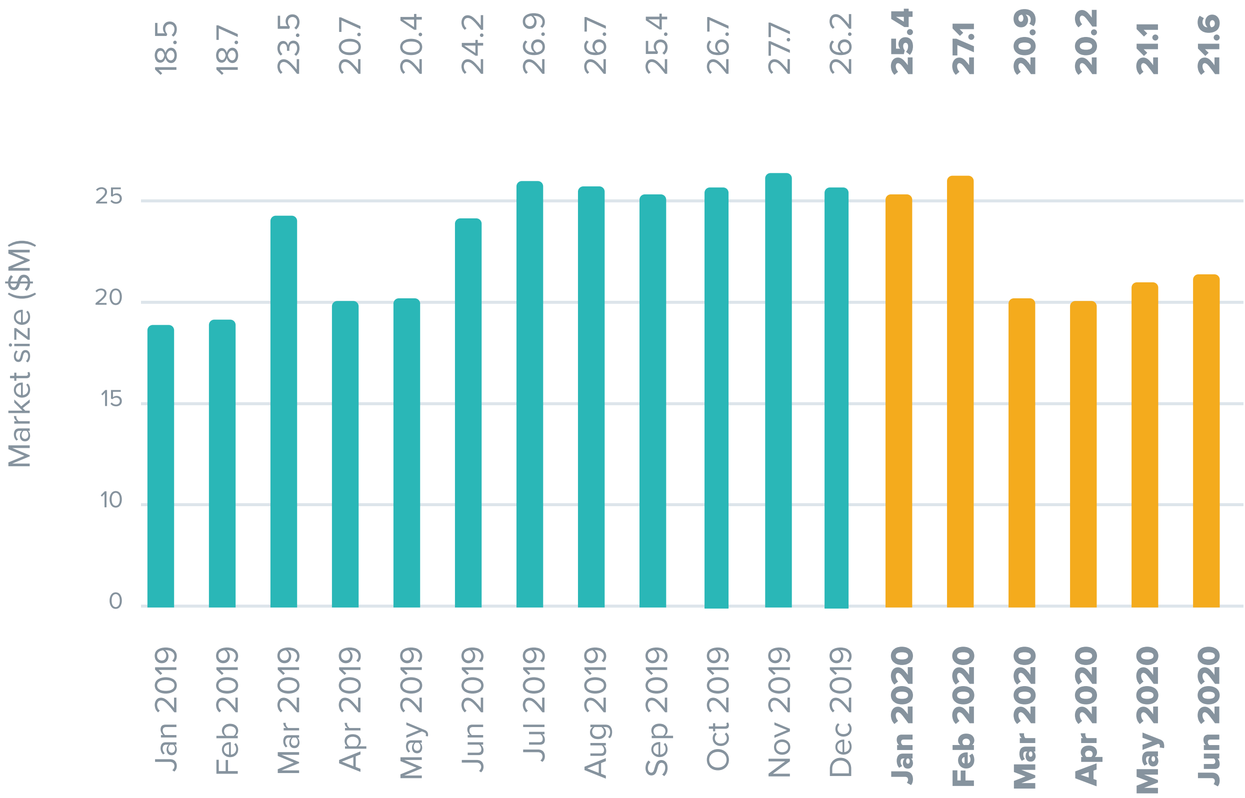
Implications:

The US faced a major economic downturn when the epidemiologic situation significantly worsened. Many people lost their jobs and many businesses closed which reflected in the growing interest in motivational accounts related to ways to make a living. It is also known that the sales of computers and different gadgets went up during the quarantine in the US, which can be explained by the need of entertainment and the overall boom of online shopping.

Business and careers category reflects the same situation which we observe in case of Finance related accounts. The uncertainty which many citizens faced in the turbulent period made many of them switch their attention to career- and income- related issues.

UK Market Capitalization

$27,8M is the biggest amount that was invested in sponsored creator content on Instagram in UK in a month. The result was achieved in **November 2019.** Regarding the media count, November was expectedly the month with the biggest number of sponsored content pieces released in Instagram influencer profiles.



Results of the top spenders: UK

16 Jan — 15 Jul, 2020

	NARS	Fenty Beauty	Netflix	Spotify	TikTok
Brand	@narsissist	@fentybeauty	@netflix	@spotify	@tiktok
EMV	$1.5M	$1.2M	$830.7K	$706K	$496.1K
Reach	12.9M	10.2M	11M	9.8M	15.6M
Influencers	1981	1704	736	1713	1379
Mentions	10729	9540	1297	4633	2258
EMV Sponsored and likely sponsored	$170K	$81.7K	$93K	$314K	$89K
Influencers (sponsored and likely sponsored)	70	58	58	166	100
Sponsored+likely sponsored mentions	223	254	72	249	142

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Strategy of the top spender in UK - narsissist

Target Audience

37.7% — United Kingdom
Top country

44.2% — 25-34 y.o.
Top age

77.7% — Female
Top gender

Sponsored Influencers Insights

59.1% — Beauty
Top category

24.6% — 100K-300K followers
Top size

Video/Image distribution

Video	2,932	27.3%
Image	7,797	72.7%

Breakdown of mentions by weekday and time

Most Engaged Posts

Most Liked
86.6K

86.6K likes • 196 comments • 16.91% ER

@jordanlipscombee in the mountains with @narsissist ⛰ thank you for having us you beautiful people♡ - - - - - - - - #gifted

Most Commented
670

13.9K likes • 670 comments • 1.55% ER

@samchapman Do you like time lapses? Because I reall y like doing them. Ryan was boxing training very loudly in t he background and you totally can't tell that I want to kill ...

Highest ER
40.52%

20.7K likes • 111 comments • 40.52% ER

@daniellafmakeup FELINE EYES😼🖤 Teaching a 1-2-1 le sson. @3wishescosmetics brushes. @zoevacosmetics 144 brush. @narsissist natural long wear foundation.

Trending Topics per Country: UK in March-May 2020

Top 10 categories with growing accounts:

- DIY and Design (n.1)
- Kids and Toys
- Humor, Fun and Happiness
- Shows
- Clothing and Outfits
- Lifestyle
- Sweets and Bakery
- Fitness and Gym
- Health and Medicine
- Family

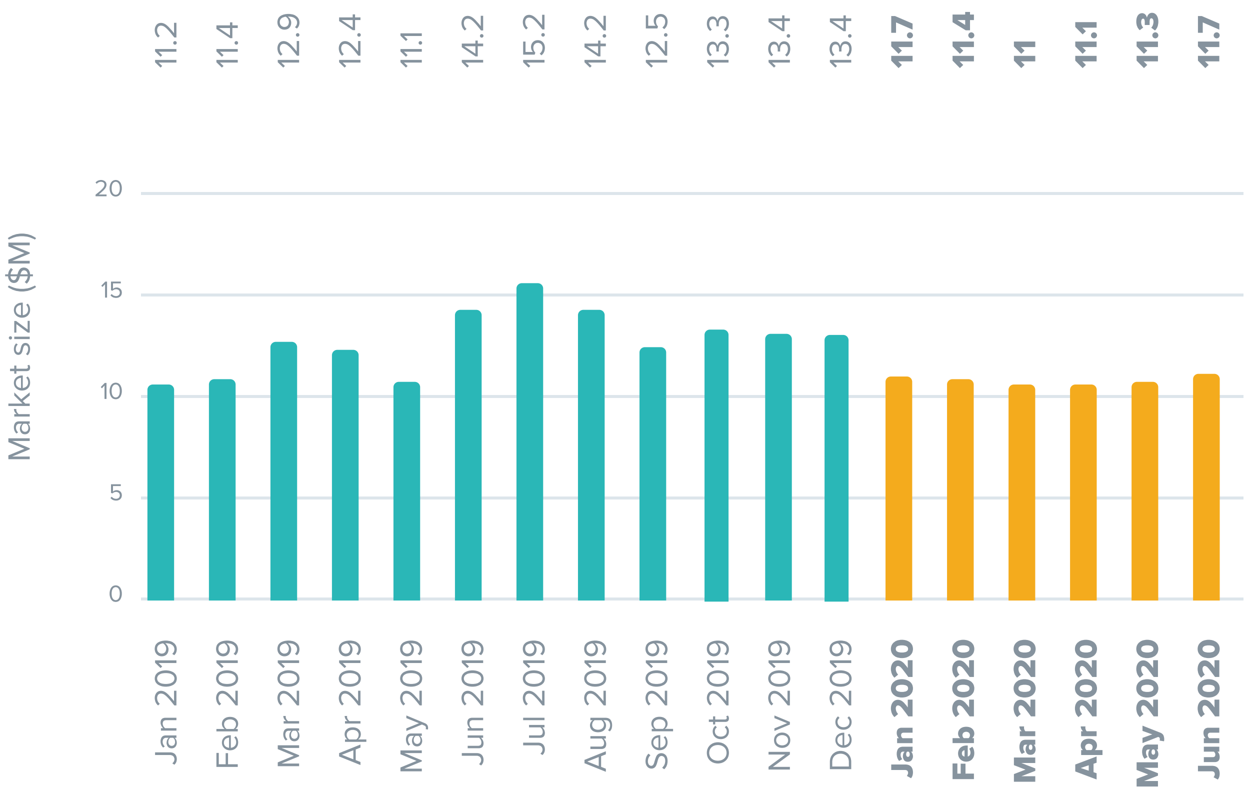
Results for the UK as well as for the European countries in the analysis differ a lot from the US.

As for United Kingdom, the most popular IG accounts were the ones related to DIY which comes as no surprise considering the quarantine conditions.

Kid and Toys and Fun related accounts equally show that in the UK citizens tried hard to entertain themselves and their children while staying at home.

German Market Capitalization

Germany differs from the US and UK markets since it had the biggest investments in advertising with influencers in July 2019 - $15,6M. Overall, **summer months** in Germany were the ones with the biggest investments: **both June and August had $14,3M** of investments. March 2020 in Germany was the month with the smallest Instagram ad spend - around $11M. What marks German market is the **homogeneous number of media pieces** released per month - from April to December 2019 the number of sponsored posts and stories released remained at similar level.



Results of the top spenders: DE

16 Jan — 15 Jul, 2020

	Desenio	TikTok	CalvinKlein	Safira	Stronger
Brand	@desenio	@tiktok	@calvinklein	@theofficialsafira	@stronger
EMV	$332.7K	$308K	$221.3K	$147K	$123.1K
Reach	7.7M	4M	2.4M	2.8M	2.3M
Influencers	967	416	314	1174	556
Mentions	1778	976	613	2143	862
EMV Sponsored and likely sponsored	$81.6K	$37.6K	$78.7	$92.7K	$53.2K
Influencers (sponsored and likely sponsored)	120	36	41	205	90
Sponsored+likely sponsored mentions	253	50	89	362	153

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Sampleo.

Strategy of the top spender in Germany – Desenio

Target Audience

58.4%	Germany Top country
43.1%	18-24 y.o. Top age
84.1%	Female Top gender

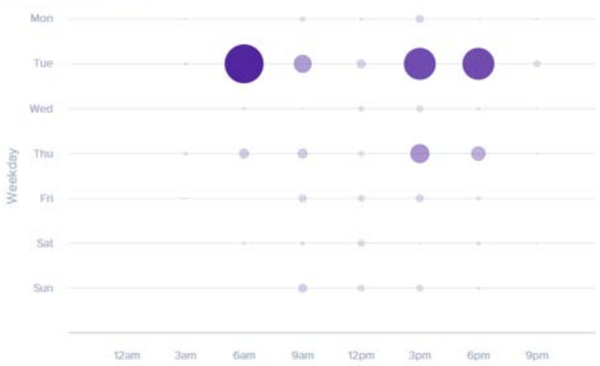
Sponsored Influencers Insights

18.8%	Family Top category
39.7%	5K-20K followers Top size

Video/Image distribution

Video	3	1.2%
Image	250	98.8%

Breakdown of mentions by weekday and time



Most Engaged Posts

Most Liked
93.9K

93.9K likes • 141 comments • 2.12% ER

@paola Werbung | Ich finde dieses Bild so unfassbar sch ön. 😍 Vor allem die Bilder im Hintergrund geben noch m al ein extra Highlight. Es war nicht einfach Bilder auszusu...

Most Commented
13.8K

36.9K likes • 13.8K comments • 1.89% ER

@annamariadamm 500€ @desenio GUTSCHEIN VE RLOSUNG Werbung* Da Reisen ja in diesem Sommer e twas schwieriger wird, kann man stattdessen die Wände ...

Highest ER
64.23%

4.9K likes • 40 comments • 64.23% ER

@anna_hnk me and my new pics from @desenio ♡ love simply white ♡ #desenio #ad

Trending Topics per Country: Germany in March-May 2020

Top 10 categories with growing accounts:

- Kids and Toys
- Sweets and Bakery
- DIY and Design
- Health and Medicine
- Humor, Fun and Happiness
- Food and Cooking
- Shows
- Animals
- Family
- Literature and Journalism

Results for Germany are close to the ones for the UK. In fact, most of European countries of the study reveal a **peak of interest toward kids, toys and baking channels**. Schools being closed, activities and entertainment are to be found for children on Instagram.

Interesting to note also: German citizens also showed the growing specific interest in literature and journalism related accounts which may denote the interest to news and experts' opinion.

They said it...

> One of the roughest impact of COVID in the Influence gaming industry has been the cancellation of events like Gamecons and E3 (Electronic Entertainment Expo). These events are opportunities to host gaming shows. Of course, games have been sold out, Switch grew in audience and VPN services rallied users.

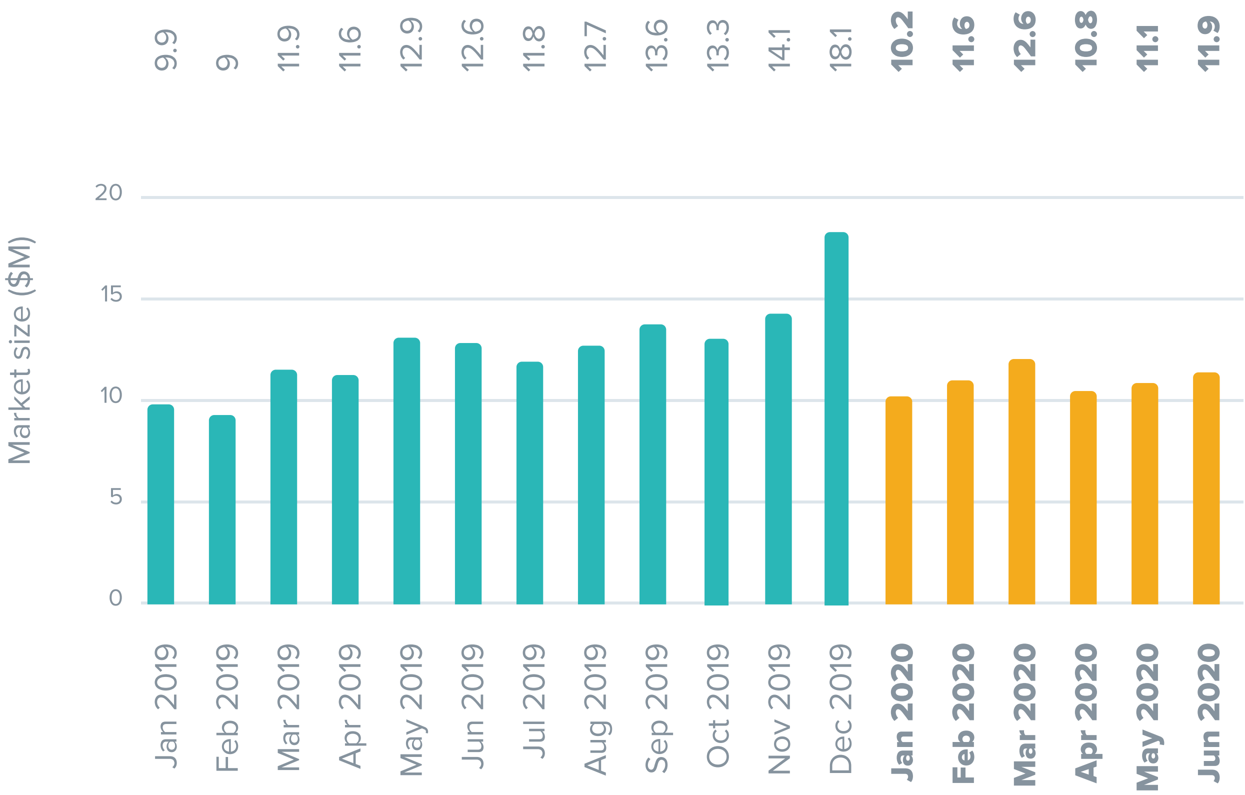
Allyance Director, Berlin (Germany)

French Market Capitalization

French market also revealed some trends inherent only to this market. The biggest investments in creators' profiles were made in **December 2019**. The result of this month is **$18,1M**. If we compare December with other periods, we will see that the second biggest period was in November - $14,1M. Thus we may conclude that the sharp difference between December and other months in France reveals that advertisers tend to invest **large budgets into Christmas-related promotions.**

March 2020 is also an interesting moment where influencers remained active and productive in comparison to March 2019. The Media Count shows **growth and capitalization remains high for the period.** This can show:

- a will to invest into **influencers with higher reach** (and remuneration) to echo philantropic and supportive initiatives
- a desire to **maintain presence** through Instagram influencers (ex: the type of campaigns we had at Sampleo at this time were mainly: 'solidarity campaigns' (price-friendly campaigns) and lots of perfume campaigns (stake being: staying top of mind for luxury brands).



Sampleo.

Results of the top spenders: FR

16 Jan — 15 Jul, 2020

	Fenty Beauty	TikTok	Desenio	Louisvuitton	Gucci
Brand	@fentybeauty	@tiktok	@desenio	@louisvuitton	@gucci
EMV	$1.6M	$413.2K	$206K	$194K	$135.8K
Reach	8.6M	6.59M	3.5M	4.3M	3.9M
Influencers	979	701	476	731	629
Mentions	4137	1235	604	1451	1231
EMV Sponsored and likely sponsored	$49K	$127K	$40K	$78.4K	$26K
Influencers (sponsored and likely sponsored)	56	61	122	54	48
Sponsored+likely sponsored mentions	127	80	161	75	60

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Strategy of the top spender in France – Fentybeauty

Target Audience

52.8% France
Top country

45.3% 18-24 y.o.
Top age

79.4% Female
Top gender

Sponsored Influencers Insights

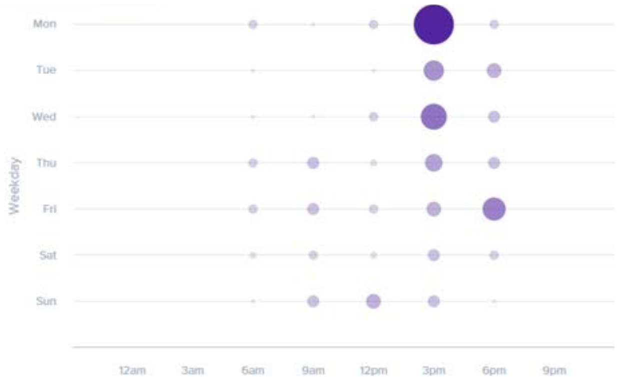
57.1% Beauty
Top category

20.0% 1K-5K followers
Top size

Video/Image distribution

Video	22	17.3%
Image	105	82.7%

Breakdown of mentions by weekday and time



Most Engaged Posts

Most Liked
344.1K

344.1K likes • 714 comments • 21.92% ER

@paolalct Last night was amazing! Thank u @fentybeauty The new mascara is incredible!!! Cream blush&Cream bronzer..... WONDERFUL

Most Commented
84.8K

160.1K likes • 84.8K comments • 13.92% ER

@romy 1.400.000 à suivre mon quotidien "et mes conneries qui vont avec" wshhhh 💔 bah du coup... bim bam boum comme dirait une certaine Carla : CONCOURS MAKE...

Highest ER
76.84%

2.8K likes • 3.8K comments • 76.84% ER

@laurie_beauty_secrets0206 GIVEAWAY ! ⚡ . Ma Beauty Fam ! C'est parti pour un nouveau concours ! Êtes-vous prêt ? Il s'agit d'une palette @natashadenona ! Elle est just...

They said it...

“The campaigns have evolved almost instantly towards more solidarity. French brands had a unique opportunity to assert themselves, and influencers had an incredible opportunity to give new depth to their editorial line.

Strategically, the health crisis has, above all, proved that it is important, in order to react quickly, to have marketing resources that can be easily activated at any time.

And that was the influencer’s biggest asset.”

Raphaël Demnard, Co-founder of Sampleo FR

Trending Topics per Country: FR in March-May 2020

Top 10 categories with growing accounts:

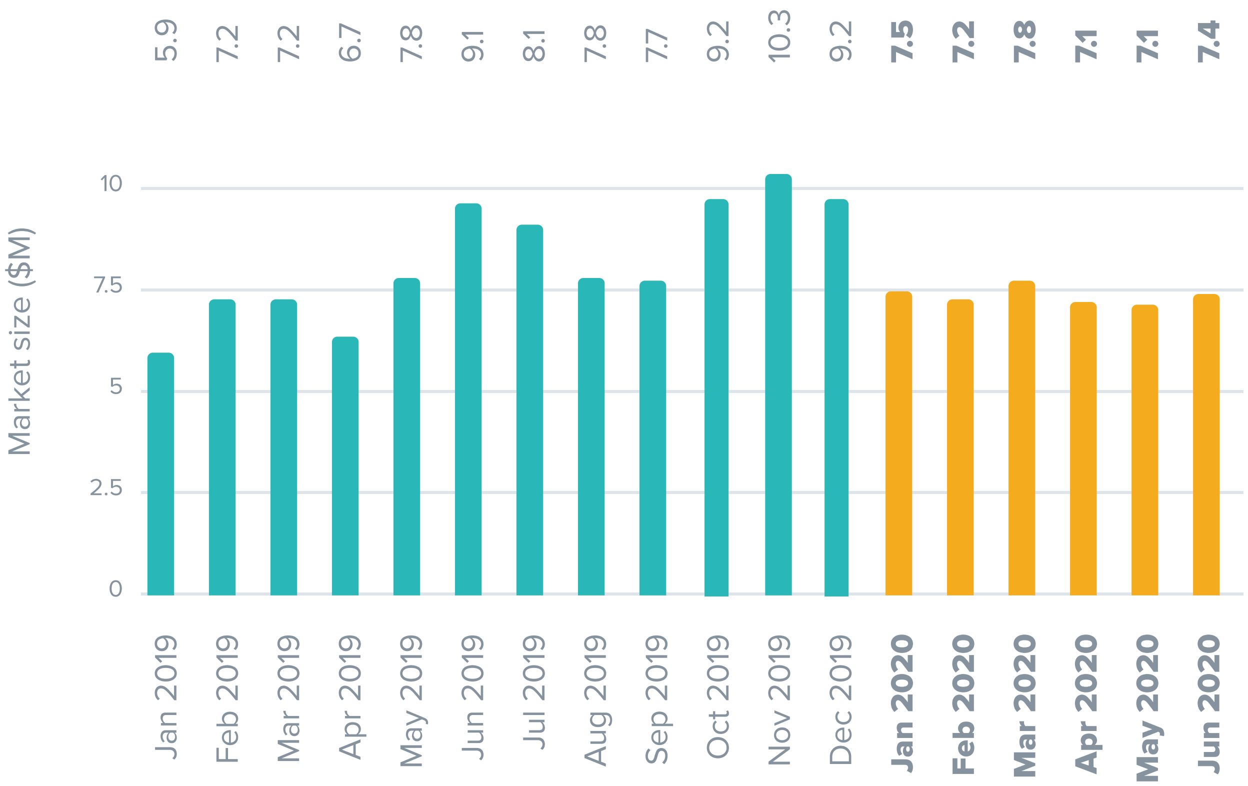
- Health and Medicine (n.1)
- Humour Fun and Happiness
- Sweets and Bakery
- Shows
- Lifestyle
- DIY and Design
- Animals
- Food and Cooking
- Fitness and Gym
- Cinema and Actors/Actresses

In the research, France is the country which got **interested in medicine and health the most** during the sharp period of COVID-19 phase.

Overall we may see that in France people got significantly interested in several wellness-related topics: health and medicines, food and cooking, as well as fitness activities. Such categories as Humour and Fun and Sweets and Bakery revealed to be ones of the most popular in France and overall in the countries under analysis.

Spanish Market Capitalization

The biggest ad spend in Spain is observed in November equalling **$10,4M**. The country is the only one which maintained **rather high investments in creators' profiles in March 2020** - $8,7M were spent on ads with influencers in this month. The result for March 2020 is higher than the spend in a half of the period from the beginning of 2019 till March 2020. What we may also observe is that the investments in Instagram creators in Spain remained steadily high from May 2019 to November 2019. In Spain, advertisers invest **significantly less in December** than in France.



Results of the top spenders: ES

16 Jan — 15 Jul, 2020

	Spotify	Dior	TikTok	H&M	Amazon
Brand	@Spotify	@dior	@tiktok	@hm	@amazon
EMV	$538.3K	$496K	$454K	$273.5K	$243.9K
Reach	19.2M	5.1M	9.7M	5.8M	4.4M
Influencers	628	362	467	576	528
Mentions	1361	807	1080	1332	1028
EMV Sponsored and likely sponsored	$213K	$60.6K	$99.9K	$32.1K	$105.3K
Influencers (sponsored and likely sponsored)	75	48	27	51	51
Sponsored+likely sponsored mentions	98	66	40	73	75

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Strategy of the top spender in Spain – Spotify

Target Audience

13.7% — **Spain**
Top country

38.9% — **18-24 y.o.**
Top age

54.4% — **Male**
Top gender

Sponsored Influencers Insights

56.6% — **Music**
Top category

31.1% — **5K-20K followers**
Top size

Video/Image distribution

Video	29	29.6%
Image	69	70.4%

Breakdown of mentions by weekday and time

Most Engaged Posts

Most Liked
721.6K

721.6K likes • 15.3K comments • 2.36% ER

@anuel #LibroDeEMMANUEL MAÑANA EN @spotify a la
s 3pm 👹👹👹👹 HOY EL ÁLBUM A LA MEDIANOCHE #
EMMANUEL

Most Commented
15.3K

721.6K likes • 15.3K comments • 2.36% ER

@anuel #LibroDeEMMANUEL MAÑANA EN @spotify a la
s 3pm 👹👹👹👹 HOY EL ÁLBUM A LA MEDIANOCHE #
EMMANUEL

Highest ER
16.55%

4.6K likes • 84 comments • 16.55% ER

@maren.oficial Venia a contaros que... @spotify HA A
ÑADIDO "TE INVITO A MI PISCINA" A UNA DE SUS PLAYL
ISTS 😱AAAAAAAAAAAAAAAAAAAAA🔨 Y sobre todo ...

Trending Topics per Country: ES in March-May 2020

Top 10 categories with growing accounts:

- Education
- Trainers and Coaches
- DIY and Design
- Shows
- Sweets and Bakery
- Fitness and Gym
- Cinema and Actors/Actresses
- Health and Medicine
- Humor, Fun and Happiness
- Kids and Toys

Spain got interested in **education-related accounts** while staying at home. What comes as a surprise is that Spain is the only country under analysis which showed an increased attention to this Instagram category.

Second biggest growing category was trainers and coaches which is easily explainable by the need for distraction, uplifting content and health-related activities.

As the quarantine restrictions were particularly severe in Spain, general opinion shown worry. Education and Health may have been seen as priorities if the lockdown was to last which is revealing of the Spanish mindset.

They said it...

“COVID has been a very tricky moment for PR in Spain and, let’s be honest, around the world. Opportunism was like the second plague of the period. In this context, the use of influencers has proven to be a reassuring marketing tool, even when budgets dropped. It finally is quite a (trans)formative moment for everyone as the focus is clearer than ever:

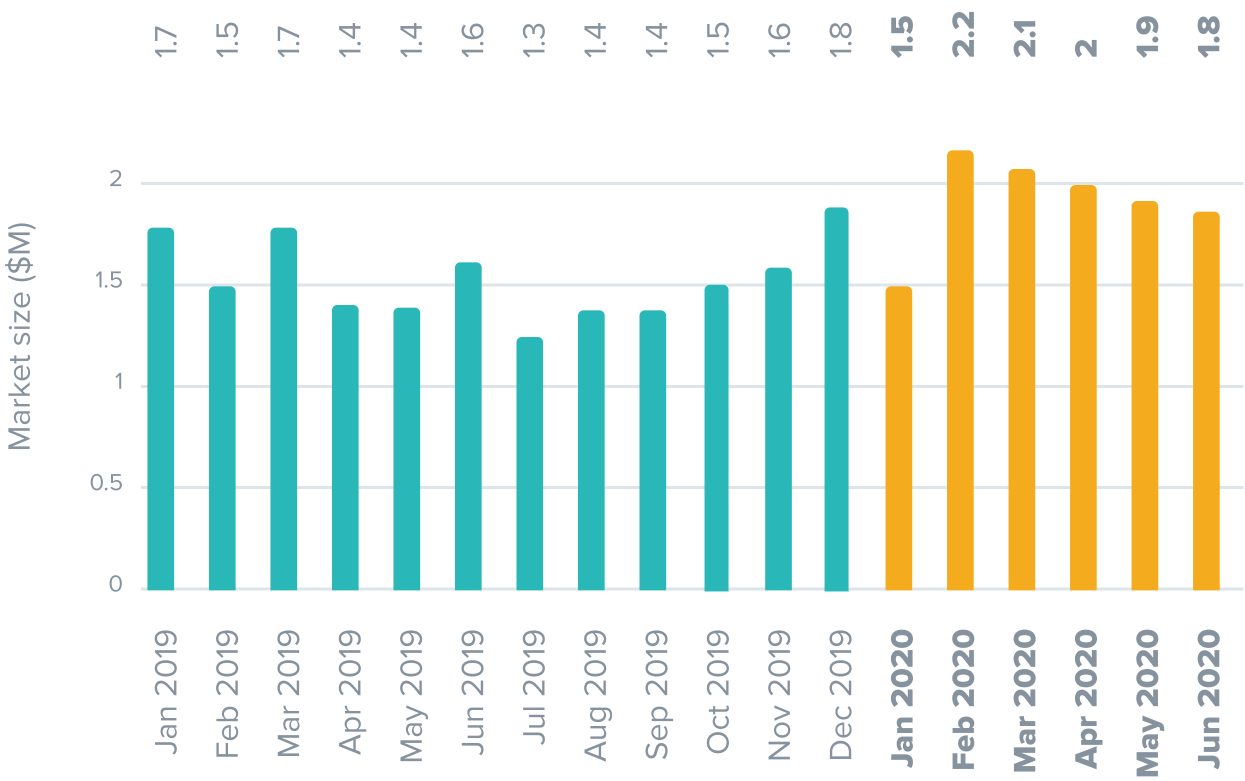
We must send the right message with the right tone and the right intention, whatever the product. ”

Project Manager, Sampleo ES

PL Market Capitalization

The Polish market represents **an exception from the general rule**, because during February and March 2020 advertisers invested the most into integrations – around $2.2M in each month. This is remarkable also because the media count was not that high in these two months and **even declined** in March. The results show the veritable growth of the Polish influencer market - advertisers started eagerly investing into creator profiles and notably in **very big profiles** - with 1M+ audience.

Celebrity influencers were invited to use their social media reach for higher purpose by popularising the #zostańwdomu (#stayathome) action, but also, to bring awareness to app services such as InPost (with parcel locker principle for packages). The Polish market mostly bet on the COVID not lasting. **Ad spending prepared the way for the reopening of businesses.**



They said it...

"Influencer marketing has been affected in terms of spending in March, April and May. It's quite understandable that in a situation when the brands lacked their resources production- and logistic-wise, they had no basis to promote their products and services. Logistics and supply chain have been a real issue for brands during these times."

Social Media Analyst, GetHero PL

Results of the top spenders: PL

16 Jan — 15 Jul, 2020

	Eveline cosmetics	Carpatree	Neonail	Rossmann	gym_glamour
Brand	@evelinecosmetics	@carpatree	@neonailpoland	@rossmannpl	@gym_glamour
EMV	$769.9K	$708.1K	$456K	$384.5K	$240.1
Reach	5M	1.2M	1.5M	5.7M	1M
Influencers	1189	87	207	928	101
Mentions	6538	503	581	2720	400
EMV Sponsored and likely sponsored	$385.1K	$690.9K	$117.7K	$281.2K	$144.5K
Influencers (sponsored and likely sponsored)	72	47	9	268	23
Sponsored+likely sponsored mentions	118	320	33	643	100

EMV (Earned Media Value) is a metric that benchmarks influencer marketing campaign effect. It estimates the price for targeted advertising with an equivalent reach and audience.

Reach Estimated number of people who see this influencer post.

Influencers Influencers or brands that mentioned this account.

Strategy of the top spender in PL - Carpatree

Target Audience

77.4% — Poland — Top country

43.6% — 18-24 y.o. — Top age

82.6% — Female — Top gender

Sponsored Influencers Insights

62.5% — Beauty — Top category

29.6% — 5K-20K followers — Top size

Video/Image distribution

Video	25	7.8%
Image	295	92.2%

Breakdown of mentions by weekday and time

Most Engaged Posts

Most Liked

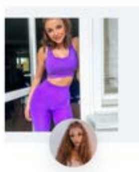
175.5K

175.5K likes • 969 comments • 9.51% ER

@ola_nowak Trochę tęsknie 🚲 Rower to zdecydowanie moja ulubiona aktywność! A jaka jest Wasza? Moja dzisiejsza stylówka jest z @carpatree z kodem OLANOWAK ma...

Most Commented

34.7K

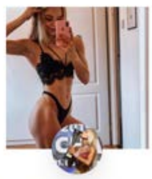


82.8K likes • 34.7K comments • 12.59% ER

@mamikoyoko WYGRYWA: @franczil @your_crushi @ahmydreams 🔥🔥UWAGA KONKURS! 🔥🔥 Do wygrania 3 vouchery o wartości 200 zł na zakupy w @carpatree !! 💜 ...

Highest ER

16.39%



9.4K likes • 84 comments • 16.39% ER

@nataliaczajkowska_ Halo halo! Jak tam wasze postanowienia w nowym roku?! Trzymacie się ich czy odeszły już w niepamięć? 😕 Planujecie brać udział w jakichś szkolenia...

Trending Topics per Country: PL in March-May 2020

Top 10 categories with growing accounts:

- Food and Cooking
- Health and Medicine
- Shows
- DIY and Design
- Cinema and Actors/Actresses
- Humor Fun and Happiness
- Clothing and Outfits
- Lifestyle
- Fashion
- Beauty

Poland cooked more than the other 5 countries above, and didn't cook Sweets and Bakery only. IG users in this country also showed a big interest to health and medicine related issues. Overall, the quarantine was the moment of glory for these accounts which normally do not have a very big following on Instagram. Apart the two above mentioned categories, Polish IG users entertained themselves pretty much as other countries on our list.

HypeAuditor

Sampleo.

#2. Comparing 2019 to 2020

Comparing 2019 to 2020

Month per month

Month	2019	2020	Difference
January	$390,79M*	$414,14M	5.98%
February	$377,61M	$418,92M	10.94%
March	$416,22M	$400,42M	-3.8%
April	$397,96M	$356,26M	-10.48%
May	$429,96M	$370,95M	-13.72%
June	$432,67M	$358,92M	-10.81%
July	$433,07M	$415,17M	-4.13%
Total	$2878,28M	$2734,78M	-5%

*World Health Organization

The WHO announced the start of the COVID-19 pandemic on March 11th 2020. The ad spend decline was supposed to happen in April since the activities planned for March could be logically finished in the second half of the month. The data shows the expected results - **10,48% decline** of the global ad spend in April. However **the sharpest decline** took place in **May.**

In July already, the estimated market decline was almost equal to the period of March 2020.

Comparing 2019 and 2020
Country per Country

Country	2019 Market Cap	2020 Market Cap	Difference
US	$2000,25M	$2096,52M	4,8% ↑
UK	$286,40M	$294,31M	2,9% ↑
Germany	$155,83M	$156,69M	0,4% ↑
France	$152,10M	$153,21M	0,8% ↑
Spain	$96,94M	$98,11M	1,1% ↑
Poland	$18,76M	$22,69M	21,2% ↑
Total for 6	$2,710,30M	$2821,53M	4,1% ↑

Analysis

Due to the forced slowdown, IM market size of the 6 countries in 2020 will remain approximately on the same level as in 2019. **Each of the six markets is supposed to recover until the end of 2020.** The biggest percentage difference is observed for the US, which comes as no surprise since this market holds the 38% share of the global Instagram ad spend.
Other 5 possess the shares from 0,36% to 5,46%.

If we were to skip the US results from this table, the impacts would appear a bit less less impressive, and investments are **less volatile.** These results also show the **steadiness of each market.** The less difference we can see between a crisis phase and a normal period, the stronger the place of influencer status and remuneration seems to be. So let's remember how the **US market hugely impacts** the global overview of the state of influencer marketing during the crisis.

Preparing for 2021

Our conclusion

The estimated global market capitalization in 2021 equals to $5869.46M which implies 15% growth from $5095.51 M estimated for the end of 2020.

The global market capitalization in 2019 reached $5,245,364,060 with the estimated media count equalling 6,851,332 sponsored publications. **According to HypeAuditor, the Instagram Influencer Marketing market will reach $5095.51M by the end of 2020.** Thus, globally the industry will not outgrow the year 2019, however, its decline cannot be characterized
as a drastic one. The forthcoming months - from September to December - will serve for the market to recover from the decline experienced due to the pandemic. **Thus, growth of the industry is not expected until 2021**.

The overall market capitalization is subject to change depending on the pace with which advertisers will resume influencer marketing activities and on the further development of the pandemic. What is certain is that the speedy elimination of COVID-related restrictions will allow many categories of content creators resume their work (eg. travel, even-related categories) which will subsequently boost the market recovery.