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# Understanding and Mapping the Australian Influencer Landscape Using Behavioural Science

FINAL REPORT | APRIL 2022

# Key Findings

## Influencers are now an established part of Australian society

- Almost three quarters of Australians aged 15-40 years of age follow at least one influencer. And of those who follow influencers, a third follow more than 15.
- Health and fitness influencers are the most popular type of influencer, although Beauty, Fashion and Pop culture / Entertainment influencers do have a particular appeal to younger Australians.
- Influencers have the potential to be powerful brand ambassadors; 7 in 10 followers have bought a product / brand / service because an influencer recommended it.
- Some influencers have an elasticity to their appeal i.e. followers are willing to listen to them on a range of topics. Other influencers though are much more narrow in their sphere of influence.
- The overall sentiment towards influencers is positive. People see them as a source of entertainment and inspiration, and in fact half of followers would be an influencer themselves if they had the chance.

## An influencer's Trustworthiness and Attraction are key to their influence

- 59% of an influencer's influence is driven by their Trustworthiness (30%) and their Attraction (29%).
- When it comes to trustworthiness, followers want their influencers to be authentic above all else i.e. the influencer truly believes in what they say. Secondly, they want to feel as if they can rely on the words and promises the influencer makes.
- Attraction is about aspiration and likeability. Followers look to influencers as people they aspire to be like, and they consider them people they would want in their own circle of friends.





## BACKGROUND AND METHODOLOGY

# Why we're here

**News Corp Australia commissioned the Behavioural Architects to undertake this research in 2022 in order to understand the following:**

### **Objectives of this project**

- Understand the role of influencers in Australian society
- Understand what influence means to consumers and what drives it
- Understand the impact of influencers on consumer behaviour
- Evaluate the weight / importance of influencers

# Methodology



## 1. Review of existing literature

A review of the existing research literature on influence and its components provided the necessary foundation to ground this study in proven scientific thinking.

## 2. Behavioural Science review and model generation

A critical evaluation of the existing research identified gaps in the current knowledge base, namely, the absence of Behavioural Science (BeSci) principles which have been proven to impact both human behaviour and influence.

A hypothesised influence model was generated using a BeSci principle lens, and this was further workshopped in collaboration with News Corp Australia to arrive at a final model for quantitative testing.

## 3. Online survey

A 15 minute online survey with n=2,000 Australians aged 15-40 years old who follow at least one influencer.

The survey measured:

- Australians' relationship and engagement with influencers
- The BeSci-inspired drivers of influence

Field work was conducted from March 17<sup>th</sup> to 20<sup>th</sup>, 2022.

## 4. Quantitative modelling

Regression and relative importance analysis modelled the impact of each Behavioural Science driver on influence, allowing for the development of the hierarchy of influence drivers.



## THE AUSTRALIAN LANDSCAPE

With social media a space where so many Australians choose to spend time, it's not surprising that three quarters of Australians aged 15 to 40 years old follow influencers, making this a firmly mainstream behaviour

73%

of Australians between the ages of 15 and 40 follow at least one influencer\*

*Females are more likely than males to follow an influencer (80% vs 66%).  
Gen Z are more likely than Millennials to follow an influencer (82% vs 68%).  
Reflecting these two trends, 88% of Gen Z Females follow an influencer, compared to only 64% of Millennial Males*



85%

of Australians between the ages of 15 and 40 use social media

## THE AUSTRALIAN LANDSCAPE

Exactly who constitutes an influencer though is up for debate – to Australians, lifestyle bloggers and Instagram models are influencers, but so are world-famous athletes and superstar musicians.

### Examples of influencers Australians follow



The size of each name represents its frequency – the larger the name, the more often it was mentioned as an influencer which Australians follow

Respondents interpreted the term 'influencer' broadly. Our survey asked respondents if they followed an influencer, and it provided a definition of 'influencer' as someone who is:

- Typically on social media
- Has credibility in a certain category / area
- Can motivate people to engage in something

When asked for examples of influencers they follow, some respondents listed celebrities such as Taylor Swift and Cristiano Ronaldo. This indicates the question of 'who is an influencer' is very much a personal and subjective evaluation.

## THE AUSTRALIAN LANDSCAPE

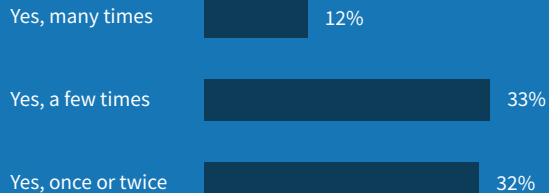
**Influencers are also opinion leaders – most followers have looked to influencers to help them make up their own mind about something.**

**Have you ever looked at what an influencer says about something to help you form your own opinion on it?**



*This suggests certain influencers could potentially be powerful champions for a cause or issue*

**77%**  
**Yes**



**23%**  
**No**

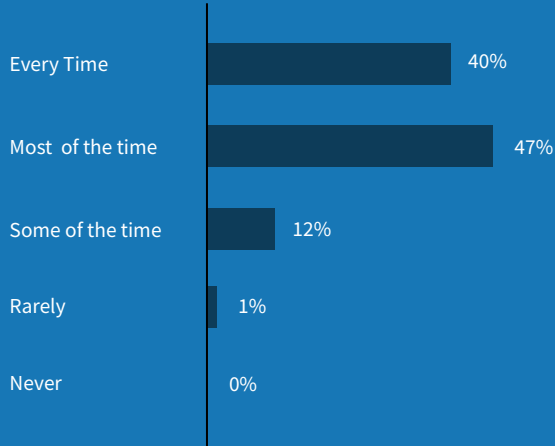




## THE AUSTRALIAN LANDSCAPE

**And these individuals are seeing influencer content almost every time they log onto social media, making it both a popular and frequent engagement**

### How often do you see influencer content when you're on social media?



*Influencers appear to be more active on Instagram. Individuals who prefer Instagram to follow influencers are statistically more likely to see influencer content (90% say they see influencer content 'Every time' or 'Most of the time'). To compare, those who prefer Facebook under-index – 83% see influencer content 'Every time' or 'Most of the time'.*

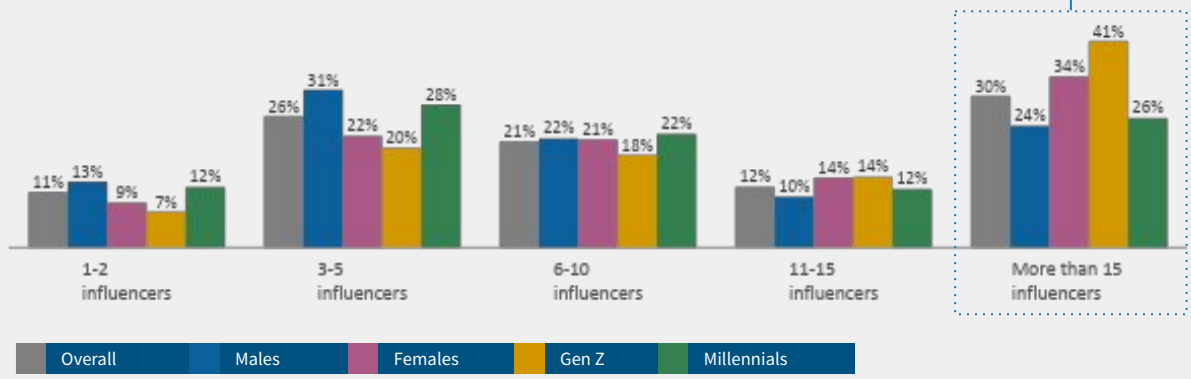


## THE AUSTRALIAN LANDSCAPE

Taking advantage of the amount of time we now spend on social media, followers are open to a wide range of influencers – in fact, one in three follow more than 15 influencers

### How many influencers do you follow?

*The generational skew is consistent across gender – 40% of Gen Z Males and 41% of Gen Z Females follow more than 15 influencers, compared to 20% of Millennial Males and 30% of Millennial Females*



In addition to following a large number of influencers, followers follow a range of categories, presenting opportunities for both niche and multi-category influencers

4.0

Average number of influencer categories followed



		Which categories do you follow influencers in?				
		Overall	Male	Female	Gen Z	Millennials
1.	Health and fitness	43%	34%	50%	41%	44%
2.	Food	40%	32%	47%	36%	42%
3.	Beauty	35%	7%	56%	43%	32%
4.	Fashion	33%	13%	49%	43%	29%
5.	General lifestyle	33%	24%	41%	33%	34%
6.	Travel	29%	27%	31%	27%	30%
7.	Pop culture / Entertainment	28%	21%	33%	37%	25%
8.	Sport	26%	44%	12%	29%	26%
9.	Finance / Investing	21%	27%	16%	15%	23%
10.	Parenting	16%	4%	25%	6%	19%
11.	Social issues / Advocacy	15%	13%	17%	15%	15%
12.	Technology	18%	32%	6%	13%	19%
13.	Luxury	13%	11%	15%	16%	12%
14.	Business / Entrepreneurship	12%	16%	9%	10%	13%
15.	Environmental issues	10%	12%	9%	10%	11%
16.	Politics	10%	15%	6%	6%	11%
17.	Automotive	7%	13%	3%	6%	8%
18.	Non-profits	3%	2%	3%	2%	3%
19.	Other	3%	4%	2%	3%	2%

Influencers in 'social good' categories are much less popular, suggesting followers seek out influencers to be entertained or as an escape.

Similar to following brands on social media, following an influencer doesn't always translate into engagement...

Thinking of the influencers you follow, which statement best describes you when it comes to:



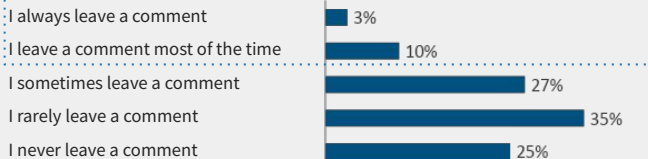
Posting a reaction



Gen Z are more likely to post a reaction – 40% say they post a reaction 'always' or 'most of the time'



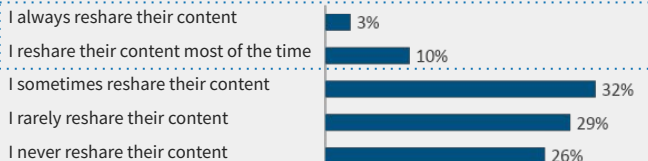
Leaving a comment



Males (20%) and those that prefer Facebook for following influencers (28%) are more likely to leave a comment



Resharing their content



Those that prefer Facebook for following influencers (28%) are more likely to reshare content





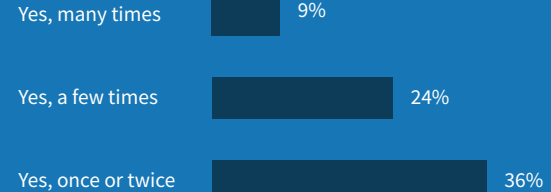
## THE AUSTRALIAN LANDSCAPE

... but followers do take onboard what influencers are saying - over two thirds have purchased something recommended by an influencer, highlighting the value influencers can bring to a brand

Have you ever purchased a product, brand or service because an influencer recommended it?

Females over-index here – 75% have purchased something recommended by an influencer, compared to 61% of Males

69%  
Yes



31%  
No



## THE AUSTRALIAN LANDSCAPE

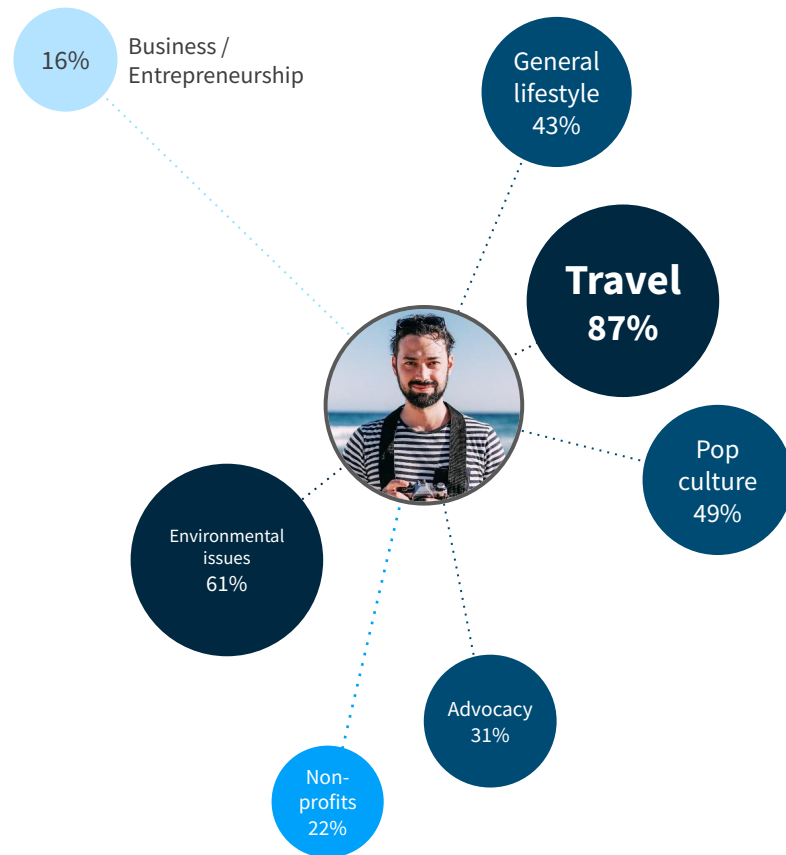
And this impact isn't necessarily confined to an influencer's primary area of expertise – influencers have **Influence Elasticity™**

### What is Influence Elasticity™?

Most influencers have a specific area of expertise (e.g. providing beauty tips, giving parenting advice, posting aspirational travel content), but it's common for them to give their thoughts on other subjects too. More importantly, though, is their followers also want to hear from them on these other subjects.

This is **Influence Elasticity™** – the ability for an influencer to extend their influence to subjects outside of their primary sphere of influence.

Some influencers have high elasticity – they are able to speak credibly on a range of subjects and issues (think of a wellness influencer who might also speak about parenting, food, advocacy, the environment, health and fitness and travel). Other influencers have low elasticity – they are only influential within a narrow set of categories (e.g. a food blogger who might be confined to food and health content).



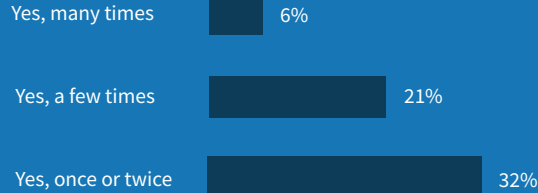


## In fact, influencers are influential enough to change peoples' opinions on issues

### Have you ever changed your opinion because an influencer you follow had a different opinion?

Males (66%) and Gen Z (66%) are more likely to have changed their minds on an issue due to an influencer's opinion

59%  
Yes



41%  
No



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# The Drivers of Influence



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## THE DRIVERS OF INFLUENCE

**Our model identifies Trustworthiness and Attraction as the most important factors for driving influence**

**An influencer's influence is driven by their:**



**1. Trustworthiness**

**30%**

**2. Attraction**

**29%**

**3. Relatability**

**15%**

**4. Expertise**

**15%**

**5. Content prominence**

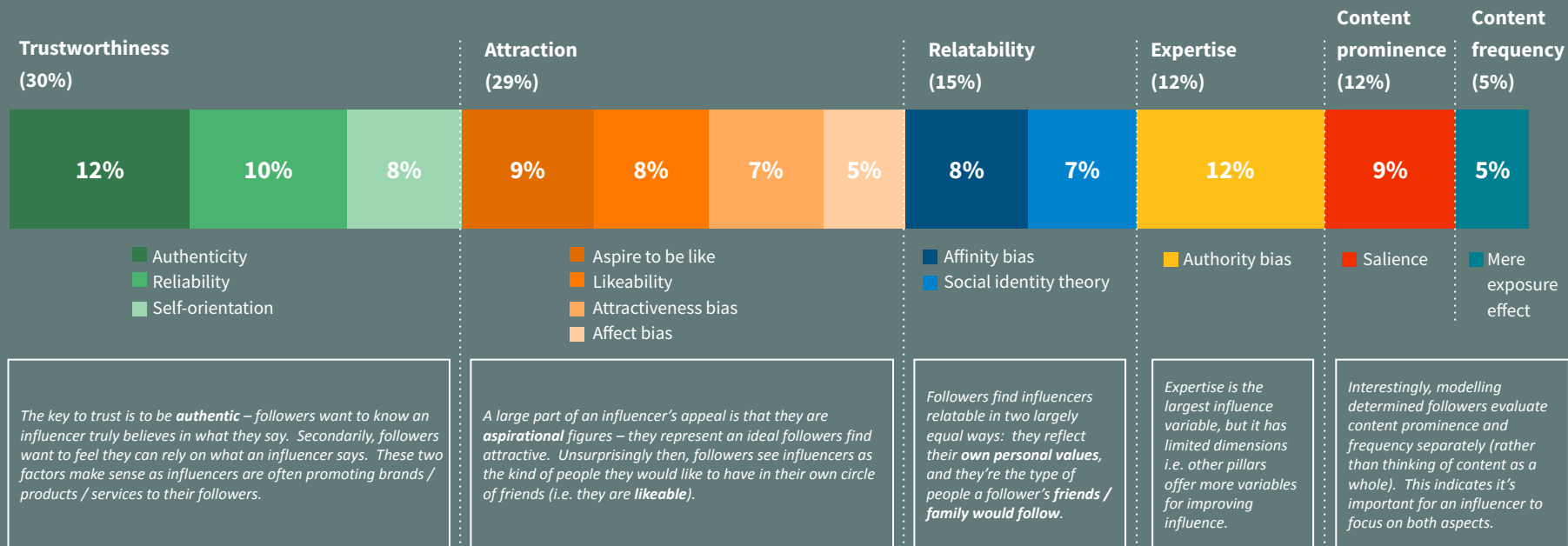
**9%**

**6. Content frequency**

**5%**

## THE DRIVERS OF INFLUENCE

At an individual variable level we see there are many ways to build Trust and Attraction, though Expertise has the largest individual impact on an influencer's influence

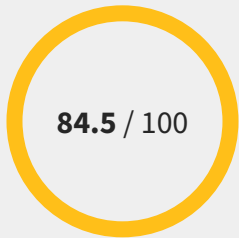


Grace Tame is in the upper echelons of influencers. This is due to followers seeing her as extremely trustworthy, relatable and appealing. She is also considered a highly credible voice on Advocacy issues. Where Grace Tame could potentially optimise further is around the frequency and salience of her content (although one could argue the fact her content is infrequent lends it more weight).



Grace  
Tame

Influence rating



Influencer ranking



		Score (out of 7)	Importance	Percentile
<b>Trustworthiness</b>	Authenticity	6.5	11.8%	100%
	Reliability	6.1	10.1%	96%
	Self-orientation	6.3	7.6%	95%
<b>Attraction</b>	Aspire to be like	5.6	8.7%	84%
	Likeability	6.2	7.9%	93%
	Attractiveness bias	6.1	7.4%	92%
	Affect bias	5.8	5.4%	93%
<b>Relatability</b>	Affinity bias	6.1	8.1%	96%
	Social identity theory	6.1	7.1%	95%
<b>Expertise</b>	Authority bias	6.1	12.3%	93%
<b>Content prominence</b>	Salience	5.2	8.7%	38%
<b>Content frequency</b>	Mere exposure effect	4.8	4.8%	26%

Grace Tame excels on all dimensions of Trust, Attraction and Relatability. In fact, no influencer in the study scored higher on Authenticity.

Grace Tame's content is less frequent and distinctive than other influencers, but the infrequency might mean when followers do see her content, it has more weight.

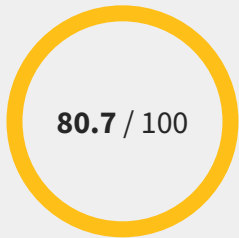


Zoë Foster Blake is in the upper tier of influencers, scoring higher than 84% of the influencers rated. This is due largely to her trustworthiness, attraction and relatability. However, she is not perceived to have a highly authoritative voice (perhaps due to her appeal across a wide range of categories), and her content frequency is low compared to other influencers.



## Zoë Foster Blake

### Influence rating



### Influencer ranking

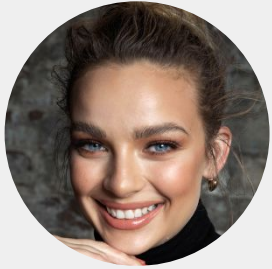


		Score (out of 7)	Importance	Percentile
<b>Trustworthiness</b>	Authenticity	6.1	11.8%	81%
	Reliability	6.0	10.1%	93%
	Self-orientation	5.8	7.6%	80%
<b>Attraction</b>	Aspire to be like	5.3	8.7%	66%
	Likeability	6.0	7.9%	90%
	Attractiveness bias	6.0	7.4%	90%
	Affect bias	5.6	5.4%	86%
<b>Relatability</b>	Affinity bias	5.6	8.1%	89%
	Social identity theory	5.8	7.1%	84%
<b>Expertise</b>	Authority bias	5.4	12.3%	55%
<b>Content prominence</b>	Salience	5.4	8.7%	58%
<b>Content frequency</b>	Mere exposure effect	4.8	4.8%	21%

Followers don't see Zoë Foster Blake as an authority figure, perhaps due to her appeal across many categories. However this broad appeal is also a strength as it allows her to be a spokesperson for a wide range of brands.

Increasing the amount of content she posts could provide an uplift to Zoë Foster Blakes influence.

Abbie Chatfield is in the middle of the pack when it comes to influencers. Her appeal is due largely to her authenticity and reliability (i.e. followers believe they can rely on her word). However her followers don't find her particularly relatable or consider her an authority in a category, and she isn't seen as an aspirational figure.



## Abbie Chatfield

**Influence rating**



**Influencer ranking**



		Score (out of 7)	Importance	Percentile
<b>Trustworthiness</b>	Authenticity	5.4	11.8%	83%
	Reliability	4.6	10.1%	75%
	Self-orientation	4.7	7.6%	38%
<b>Attraction</b>	Aspire to be like	4.7	8.7%	36%
	Likeability	4.7	7.9%	52%
	Attractiveness bias	5.1	7.4%	67%
	Affect bias	5.3	5.4%	61%
<b>Relatability</b>	Affinity bias	4.6	8.1%	63%
	Social identity theory	5.1	7.1%	29%
<b>Expertise</b>	Authority bias	5.4	12.3%	38%
<b>Content prominence</b>	Salience	5.0	8.7%	53%
<b>Content frequency</b>	Mere exposure effect	4.8	4.8%	61%

Followers don't aspire to be like Abbie Chatfield, suggesting her content or the way she frames it might be off-putting to some.

Followers don't think Abbie Chatfield as someone reflective of their own social group / peers. This could be due to her reality TV background, which creates distance with your everyday Australian.

Nick Kyrgios is one of the poorer performing influencers in our dataset – he isn't as trustworthy or likeable as other influencers. However, his followers do recognise his expertise in tennis, and he is able to generate an emotional reaction with his posts.

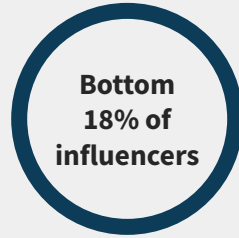


## Nick Kyrgios

**Influence rating**



**Influencer ranking**



		Score (out of 7)	Importance	Percentile
<b>Trustworthiness</b>	Authenticity	6.1	11.8%	33%
	Reliability	5.6	10.1%	12%
	Self-orientation	5.3	7.6%	7%
<b>Attraction</b>	Aspire to be like	5.0	8.7%	26%
	Likeability	5.4	7.9%	7%
	Attractiveness bias	5.7	7.4%	24%
	Affect bias	5.3	5.4%	58%
<b>Relatability</b>	Affinity bias	5.2	8.1%	18%
	Social identity theory	5.3	7.1%	21%
<b>Expertise</b>	Authority bias	5.3	12.3%	52%
<b>Content prominence</b>	Salience	5.4	8.7%	26%
<b>Content frequency</b>	Mere exposure effect	5.2	4.8%	23%

*Nick Kyrgios doesn't come off as someone who truly compares about his followers compared to other influencers. This might explain why his followers are less likely to want him in their circle of friends.*

*Nick Kyrgios's strength lies in his tennis ability. He is also good at generating an emotional response, which is unsurprising given his penchant for outspoken behaviour.*



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