



State of Influence in Asia 2021

A deep-dive into the state of influencer marketing and the creator economy in Asia





Foreword

We are now in a new era of influence.

Driven by the democratization of tools available for influencers and creators, we are seeing the continued growth of the creator economy all around the world. One accelerated by digital commerce, technological advancements and forever-changed consumer behavior.

In Asia, forward-thinking marketers, influencers and creators have already embraced the new creator economy and are experiencing the benefits of it.

Marketers can increasingly tap on deeper data and technology around influencers to power influencer marketing campaigns.

Influencers and creators have even more ways to create content, grow their audiences, or expand their own ventures beyond marketing.

At AnyMind Group, we have been at the forefront of this wave in Asia, and possess one of the widest and deepest offerings for marketers, influencers and content creators across the region. From influencer marketing and brand collaborations, to content monetization and providing creators with the tools and ability to create their own brands and merchandise, and more.

I hope that this report will provide you with a better understanding of what is currently happening in this space, and what will happen in the coming years.

Kosuke Sogo
CEO and co-founder of AnyMind Group

About this report

When we created the 2020 version of this report, the focus was solely on influencer marketing.

With this 2021 report, we're looking to uncover various trends happening within the influencer marketing space and wider creator economy in Asia, especially when matched with data from yesteryear.

The State of Influence in Asia 2021 report aims to help marketers, influencers and content creators to make increasingly informed decisions on influencer marketing and the creator economy, and drive education around the new era of influence across the region, ultimately furthering the industry for more impactful and efficient marketing and commerce.

This report leverages data points from over 200,000 influencers through the AnyTag platform, and over 2,000 influencer marketing campaigns conducted across Asia over the past year. All figures shown are accurate as of publication date.

We have made an editorial decision to not include TikTok in this report as further stabilization is still needed to deliver valuable insights. This will change for future reports, as the platform matures and more data is captured in the coming year.

Over the coming weeks and months, we will be delivering smaller, more-focused reports for various markets in Asia - watch this space!

The State of Influence in Asia 2021 report covers markets including Cambodia, Hong Kong, Indonesia, Japan, Malaysia, Myanmar, the Philippines, Singapore, Taiwan, Thailand and Vietnam. We've also added India into the mix, which is a highly exciting market for now and the future.



About AnyMind Group

AnyMind Group is an end-to-end commerce enablement platform for marketers, influencers, publishers and businesses.

Founded in 2016, AnyMind Group has expanded rapidly across Asia. The company builds platforms that form key business infrastructure for the digital economy, including software for business analytics, cloud manufacturing, e-commerce enablement, marketing and logistics.

The company powers some of the most exciting corporations and next-generation companies, the most dynamic influencers and creators, and the most forward-thinking online publishers and app developers across the region.

Find out more at
<https://anymindgroup.com/>

Overview of influencer marketing in Asia

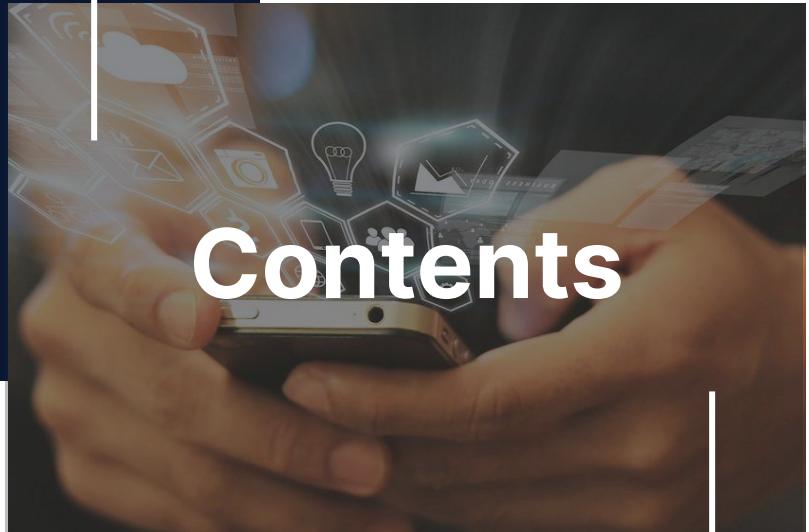
- Most used social media platforms by influencers in Asia
- Influencer demographics
- Top influencer verticals in Asia
- Influencer marketing campaign changes over the years
- Platforms used for influencer marketing campaigns

A closer look at various markets

- Most commonly-used platforms by influencers per market
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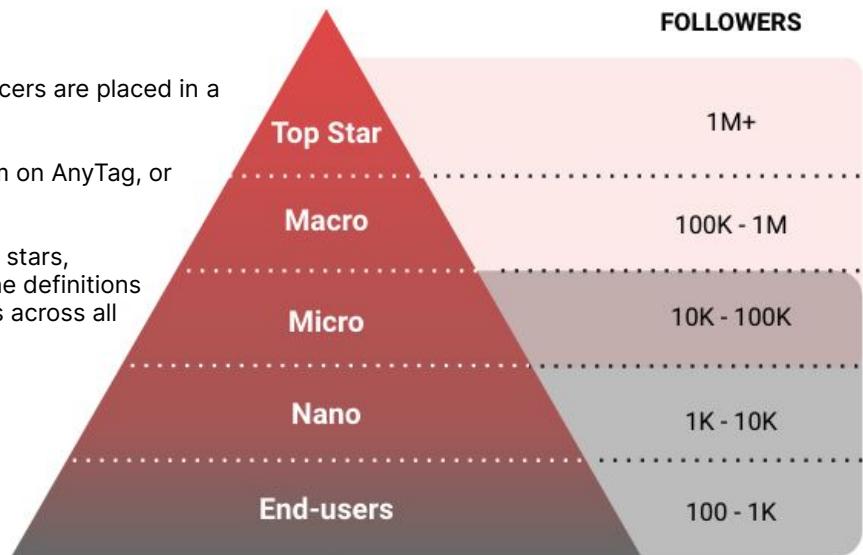
Definitions

Throughout this report, various influencer verticals are mentioned. Influencers are placed in a vertical based on the type of content that they primarily create.

These influencers might have just a single registered social media platform on AnyTag, or hold accounts across various social media platforms.

For the purposes of clarity, influencers are placed into five categories: top stars, macro-influencers, micro-influencers, nano-influencers and end-users. The definitions of each influencer category is shown on the right, based on total followers across all platforms.

Data was obtained from influencers through the AnyTag platform, and encompasses influencers across all ages, all major social media platforms (YouTube, Facebook, Instagram and Twitter), and all influencer ranges mentioned above.



Overview

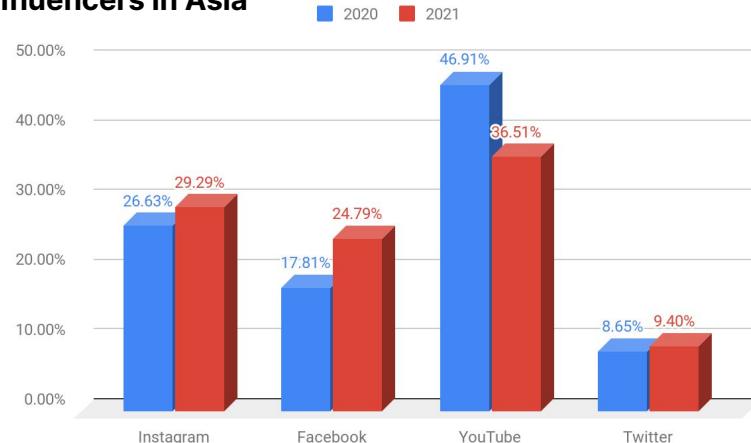
Some topline stats to start things off, including most-used social media platforms, influencer demographics, top verticals, and influencer marketing campaign trends

How Asia is stacking up

In the past year, Instagram, Facebook and Twitter saw increases in proportion to the other social media platforms, whilst YouTube still ranks highest in most-used social media platforms, when compared in proportion to Instagram, Facebook and Twitter.

The increase in influencer's usage of Facebook was driven by the likes of Vietnam and Myanmar, whilst Instagram was driven by markets including Hong Kong, Malaysia, the Philippines and Singapore.

Proportion of most-used social media platforms by influencers in Asia

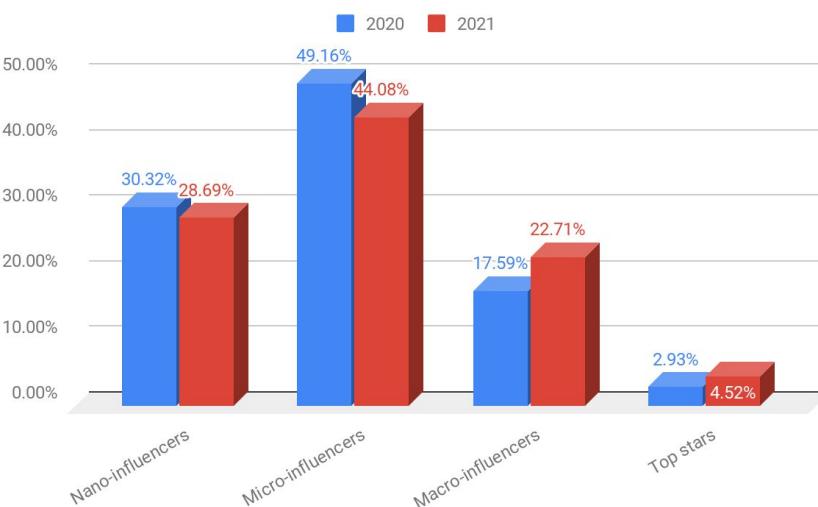


*Percentages on the chart reflect platform usage as a proportion to other platforms.

**Influencers might possess accounts on AnyTag for different social media platforms.

Between 2020 to 2021, there was a shift by micro-influencers to become macro-influencers, with macro-influencer volume increasing by approximately 66%. At the same time, the number of influencers with more than 100,000 followers in total have also increased as a proportion to other influencers, and this is a trend that we will continue to see in the coming year.

Influencer demographics



*Percentages on the chart reflect influencer demographics as a proportion to other demographics

What types of content are influencers creating?

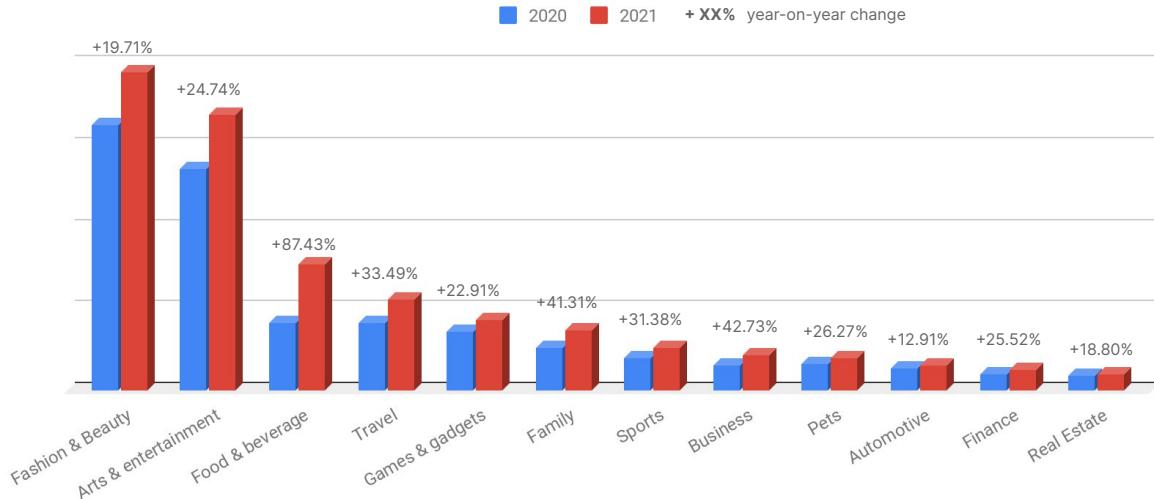
Over the past year, influencers who created content around fashion & beauty are the most populous, but have the third-lowest growth rate amongst influencer verticals.

Due to movement restrictions across the region, there was also a large rise in influencers producing home-based content, including food & beverage (eg. cooking tutorials, etc), family (parenting), sports (fitness) and travel.

There were also larger increases for influencers across Asia creating content around business and finance as compared to 2020.

With cross-border travel restricted for most regions in the past year, influencers have also taken to creating content around domestic travel.

Top influencer verticals in the past year



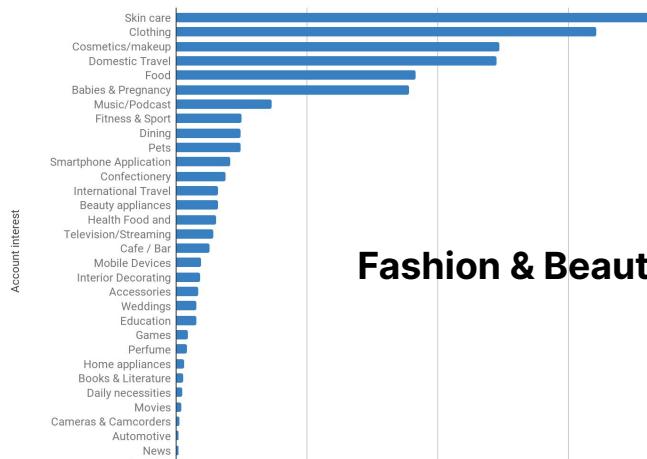
*Influencers are categorized based on the type of content that they primarily create

** The 2021 report has merged the fashion and beauty influencer verticals

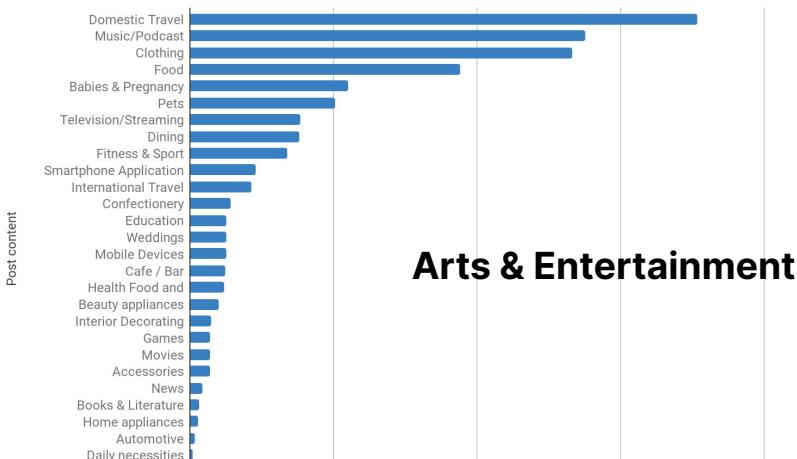
Unpacking the top two influencer verticals

We dived deeper into the type of content published by influencers in the top two influencer verticals - fashion & beauty, along with arts & entertainment - and there are definitely some similarities between the types of posts these influencers deliver. Content around clothing and food are in the top five, and interestingly domestic travel features in the top ranked types of content for both sets of influencers (international travel is way lower due to travel restrictions around the world).

Our take: brands can work interchangeably with both sets of influencers, but having detailed insights can ensure the right influencer(s) is selected for a specific product, brand or campaign.



Fashion & Beauty



Arts & Entertainment

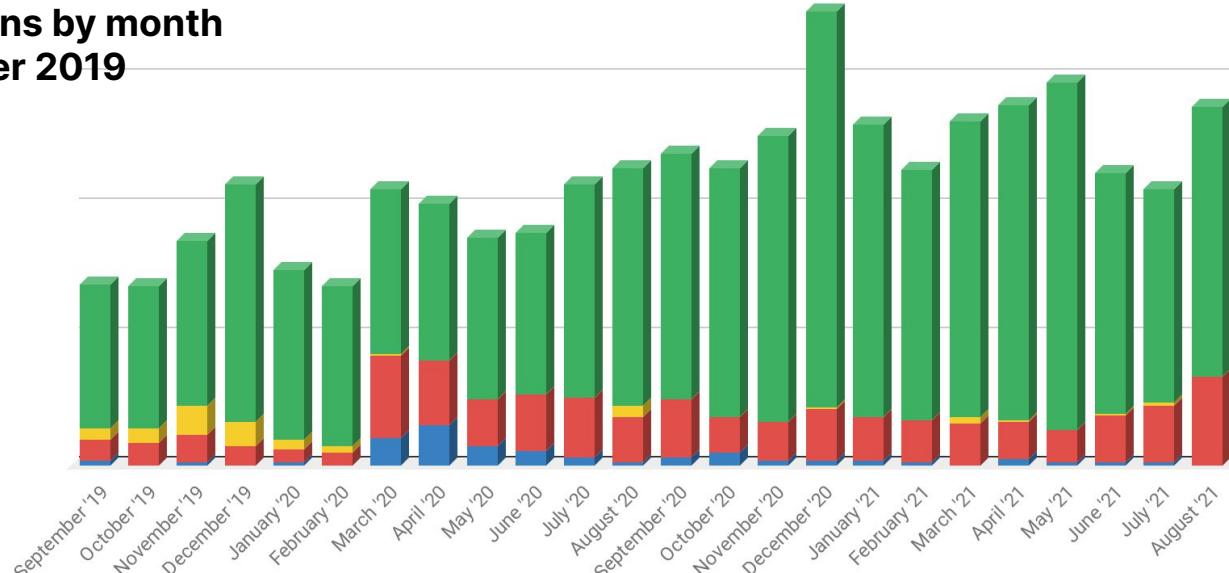
Influencer marketing campaign changes over the years

Although the start of the pandemic saw a larger number of cause-related influencer marketing campaigns (such as campaigns around brands urging audiences to stay at home), that number has dropped in the past year. Instead, brands are once again activating product-related influencer marketing campaigns, with the volume of branding-related campaigns still consistent in the past year.

Larger spikes in influencer marketing campaigns are attributed to traditional shopping seasons during the months of November and December. There are also very few influencer marketing campaigns which require influencers to attend events, compared to pre-pandemic volumes, due to movement restrictions across the region.

■ Product ■ In-person events ■ Brand ■ Cause

Active campaigns by month since September 2019



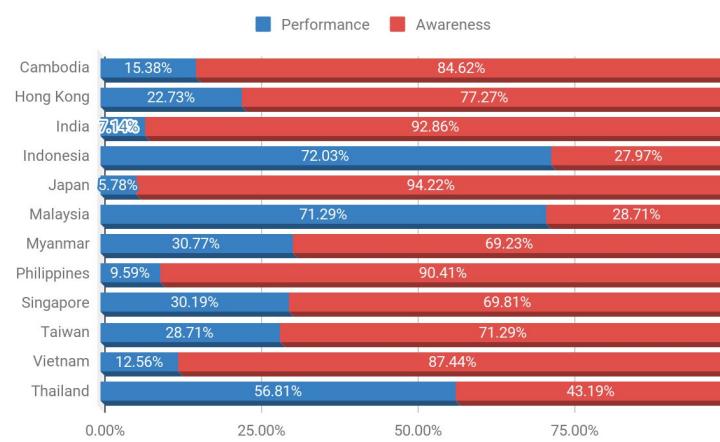
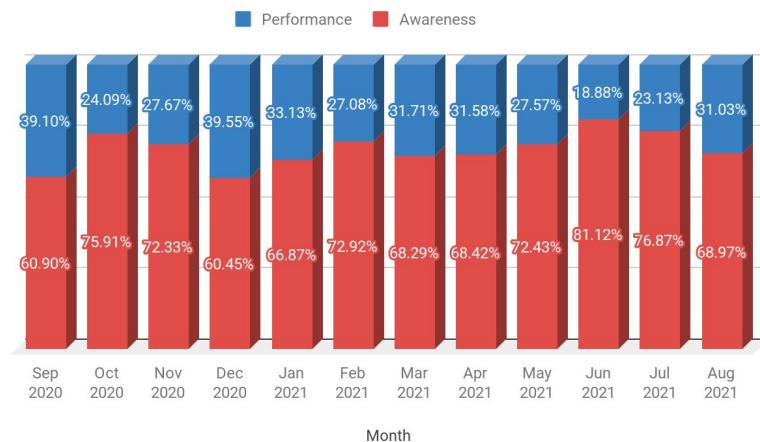
A deeper dive into the past year of campaigns

Diving into 2,000 influencer marketing campaigns run on the AnyTag platform in the past year, there are no trends that stand out when looking at the difference between awareness-driven and performance-driven campaigns by month. One of the reasons is that performance-driven influencer marketing campaigns are still nascent in this part of the world. We were determined not to leave you with just that, which is why we dived even deeper into the data.

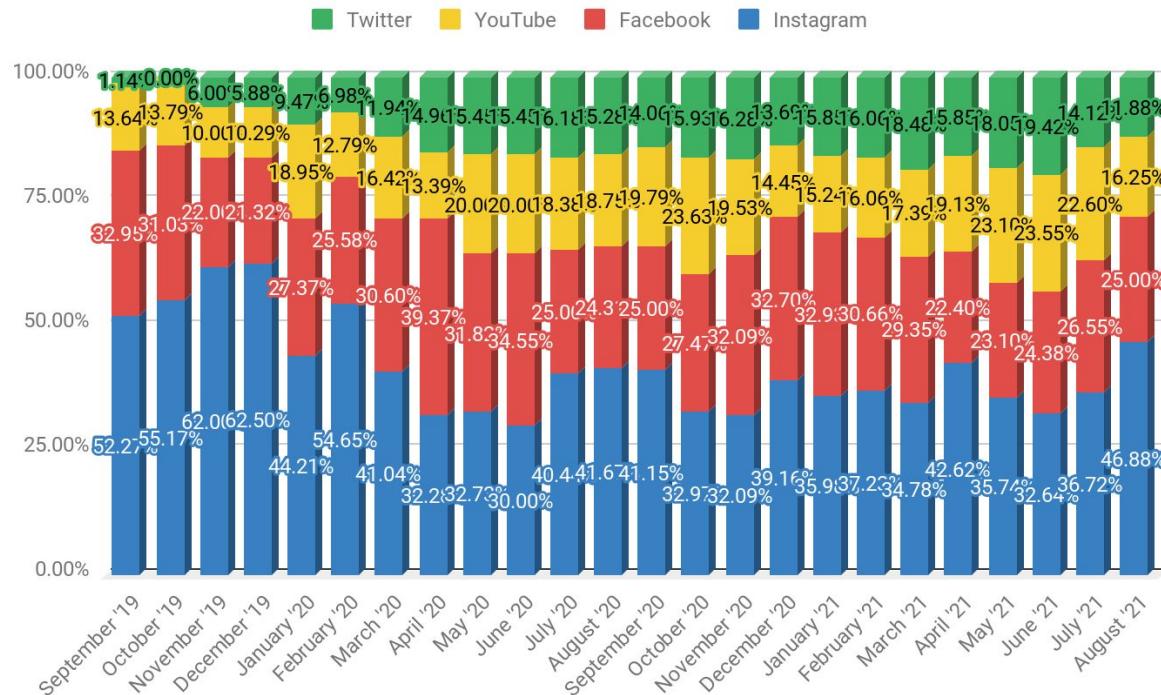
When looking at the proportion of performance-driven versus awareness-driven campaigns by market:

- Indonesia, Malaysia and Thailand ran campaigns that were largely performance-driven
- India, Japan, Philippines and Vietnam ran campaigns that were largely aimed at mass awareness

With that said, we're expecting further increases in performance-driven campaigns in the coming year, as influencer marketing becomes increasingly targeted at specific and niche audience segments.



Which platforms are influencer marketing campaigns run on?



In our 2020 report, we highlighted that Twitter was seeing growing momentum as a platform for influencer marketing campaigns, and that has continued into 2021.

Since September 2020, campaigns on Twitter saw a YoY increase of 165.03%, followed by YouTube (+117.92%), Facebook (+68.58%) and Instagram (+44.43%).

On the flip side, Instagram garnered the majority of influencer marketing campaigns in the past year (37.08%), followed by Facebook (27.53%), YouTube (19.44%) and Twitter (15.95%).

A closer look at various markets

Some key stats across markets in Asia and comparison of influencer data across these markets

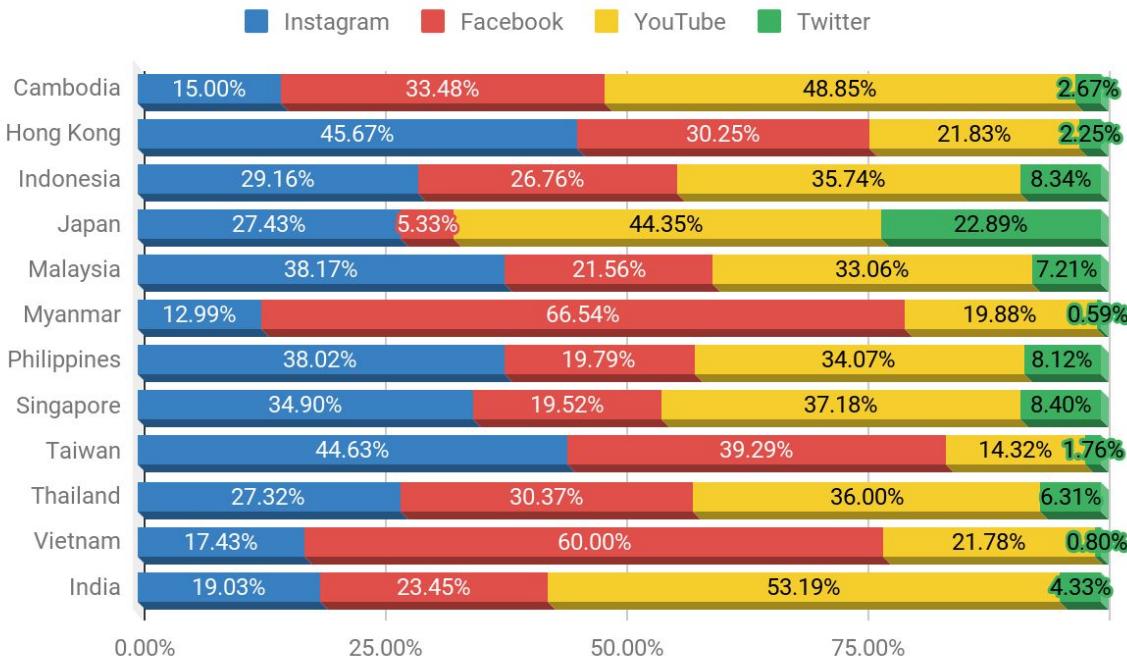
What platforms are influencers using in Asia?

Asia's diversity in consumer habits and platform usage are also reflected in influencers choosing which platforms to deliver their content on.

In this snapshot, we see that Instagram is the most-used by influencers in Hong Kong, whereas Facebook is most-used by influencers in Myanmar.

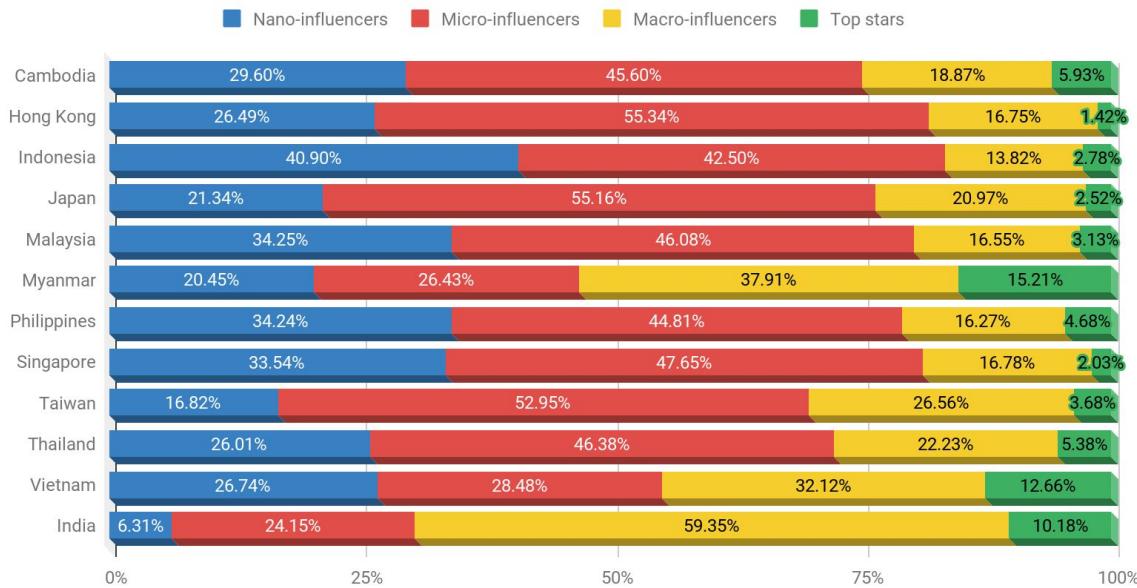
On the other hand, YouTube remains strong in markets like Cambodia, Japan, Taiwan and India, and Twitter has strongest market share as a proportion to other platforms for influencers in Japan.

Most commonly-used platforms for influencers



How does influencer follower volume stack up across markets?

Influencers categorized by total follower volume



Across the AnyTag platform, micro-influencers make up the majority of influencers, but it is also the demographic with the smallest growth rate (15.05%). Instead, top stars (97.85%) and macro-influencers (65.65%) saw the highest growth rates in the past year.

Markets with the highest proportion of *nano-influencers* include Indonesia, Singapore, Philippines and Malaysia, whilst Japan, Hong Kong and Taiwan had the highest proportion of *micro-influencers*.

With that said, Vietnam had the healthiest spread of influencers across all influencer demographics.

For standardization, influencers across all markets are classified as follows, based on total followers across all social media platforms: nano-influencers (1k-10k followers), micro-influencers (10k-100k followers), macro-influencers (100k-1M followers), top stars (1M+ followers).

Trends in Asia

Over the past year, five key trends have started to emerge, and will see sustained momentum in the coming year and beyond.

#1. Influencers creating and launching their own brands

In the new creator economy, influencers and creators across the region are launching their own brands and products, driven by their expertise in a certain field, passion or life experience.

For example, Japanese model [Mirai Saitou](#), who is also a certified sleep consultant, launched her sleep care brand, SLEEE. The product lineup features sleepwear, aromatic Epsom salts, pillow mist, eye pillows and more.

What this means for marketers and brands

With influencers building closer connections with their audience, followers are able to better understand the true quality of products an influencer advocates by using more senses compared to just looking at a product through their devices.

Additionally, there is more data around the ability of an influencer to drive follower action, including influencing purchase decisions.

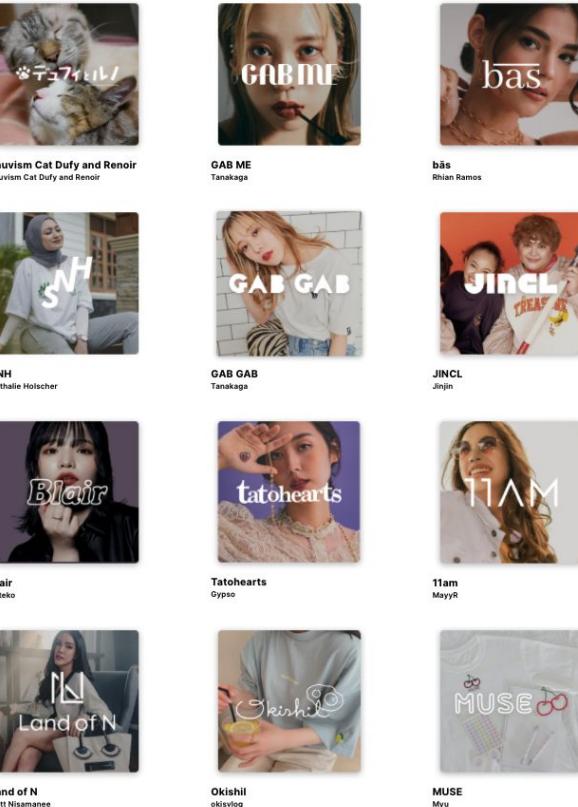
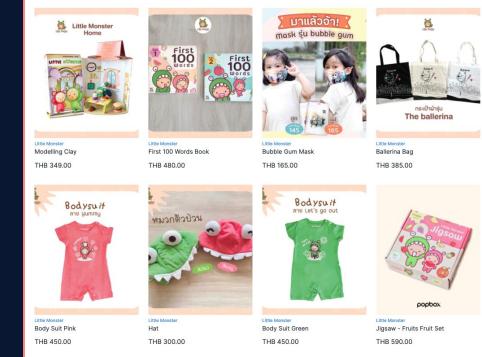
How an influencer seamlessly combines content for their own brands and that of brands they advocate will also be important, as followers will notice unusual changes in content or inauthenticity.

Ultimately, the above leads to a more robust influencer marketing ecosystem that forms deeper connections with audiences.

As such, marketers will need to find ways to get such data and information, either by tapping on influencer marketing platforms that have this, or by building closer relationships with influencers.

Even content creators are jumping in
Little Monster creates content for 3.5 million followers in Thailand, with a strong focus on parenting content.

They recently launched a [lineup of children's products](#) on PopBox, with a focus on aiding the development of children.





#2. Direct-to-consumer and e-commerce

Consumer behavior shifts driven by the pandemic have accelerated trends towards direct-to-consumer (D2C) and e-commerce business models. This means marketers have an even greater amount of touchpoints to manage and obtain data from, and as a result, influencer marketing also needs to adapt to include these online touchpoints by measuring clicks and conversions, compared to tracking just the number of post likes, comments and shares.

With influencers also creating their own brands and going direct-to-consumer, marketers have an immense opportunity to not just obtain purchase insights, but also to understand what influencers are doing to drive online sales for their own products.

As such we'll see evolutions in content creation and strategies, and increased data integrations between online stores and influencer marketing.

Marketers

The online space is noisy and e-commerce is even noisier.

The benefit of pairing online commerce and sustained influencer marketing activity is that it can now support both branding and performance objectives. The onus is now on connecting e-commerce store data to influencer marketing data.

The trick here is to work with influencers to find new ways to drive conversations and clicks through innovative content. Also, plan ways to leverage on various creator economy trends to drive compelling call-to-actions and collaborations.

Additionally, logistics is becoming a crucial customer touchpoint for - and the only customer touchpoint for e-commerce brands, with data and customer experience in logistics becoming key for marketers.

Influencers

Influencer marketing was previously seen by marketers as a channel to drive brand awareness. However, with advancements in influencer marketing tech and the continued rise of online commerce, marketers are now also gaining trust and looking at influencer marketing as a direct channel to drive business results.

There will be more campaign briefs in the future looking at KPIs such as conversions, installs, clicks, purchases, sign-ups and more, which will effectively change the way campaigns are run and content is delivered.

The challenge now is in creating content that converts followers into customers for a brand.

Our advice is to work closely with marketers and understand what has helped drive product sales for them, and innovate from there.



#3. The rise of social commerce

Social commerce will be here to stay. Platforms like Facebook, Instagram, YouTube and Twitter have already made such features available in some parts of the world, and TikTok is one of the most recent platforms to join in on the fun. The thing is, Chinese platforms have already made such features available for years.

With social commerce, brands and influencers alike have an already-present channel for commerce. The entire process of discovering products, referencing reviews and making purchases can all be done without leaving a social media platform.

Within social commerce (or outside, depending on how you look at it), conversational commerce is another channel where users can ask questions and make purchases directly to a merchant through chat applications.

Now, that's a whole load of touchpoints to handle, but the best thing is that this plays right into influencer marketing!

Marketers will now need to identify the goals and objectives, along with the social commerce channels that their target customers are on, which will undoubtedly have an influence on how influencer marketing campaigns are planned out and executed. Influencers can drive users towards a brand's social commerce channel or even offer the same through their own profiles, depending on which channels are selected.

Conversational (or chat) commerce

Conversational commerce opens up a channel between a brand (or merchant) and consumers to easily communicate, receive recommendations, obtain product information, make purchases and more.

Why does this matter? Chances are the majority of a brand's target audience in Asia is already using a chat app or even multiple chat apps, meaning that they are already on a conversational commerce platform.

Apart from "pull" tactics, brands can also leverage "push" tactics including sending product availability updates, offers and promotions, cross-selling or even upselling, all in a highly personalized and intimate way.





#4. Subscribing to expertise

Many influencers have made a name for themselves by building content around their area of expertise. Increasingly influencers are also packaging content for their followers to consume through subscriptions or on a one-time fee basis.

From behind-the-scenes videos, e-books, recipes, online classes, and more, influencers are providing followers with a more in-depth look into a specific topic that they've built a niche around. Platforms such as Patreon and Twitch provide influencers with out-of-the-box subscription services, and even social media companies are joining in on the fun. From WeChat's paywall feature and Twitter's Super Follows to YouTube's channel memberships - even Instagram has been reported to be creating something similar.

Similar to how influencers are creating their own brands, additional monetization streams with a paying audience can be seen as a threat to marketers and brand collaborations, as it may seem as though influencers will no longer rely solely on sponsorships.



FitJunctions
FitJunctions is one such influencer that is thriving in this space and creating valuable content for its close to 1 million followers. Apart from delivering fitness training content through monthly subscriptions, an e-learning portal, personalized coaching and online training, FitJunctions has also created and sells e-books and comics around fitness and workouts.

With that, new opportunities arise for marketers to co-create content, subsidize access fees and more, to gain access to a highly-engaged audience.

On the other hand, the audience will know that any brand an influencer collaborates for this highly-premium segment of followers is one that they can truly vouch for.

As the creator economy strengthens, further opportunities and challenges will also present itself, and marketers will need to find ways to navigate this fast-changing landscape.



#5. The influx of data

With the use of technology now rampant in influencer marketing, data directly related to an influencer's campaign activities is now available to marketers, along with deeper data around influencer marketing such as campaign impact on business results. With the rise of the previous four mentioned trends, data around the ability for an influencer to drive purchases and user action will also be available to marketers.

Influencers will also have access to even more data around their followers, from top and engaged fans and type of brands to work with, to business venture strategies and data-backed evaluation on content strategy.

In fact, we will start to see more data points open up that both marketers and influencers can tap on.

Marketers

As mentioned above, marketers will undoubtedly have access to how an influencer marketing campaign has impacted business results, including what were the needle movers for a certain campaign.

Additionally, marketers can use an influencer's campaign performance data to guide recommendations and bring in similar influencers for future campaigns.

By tapping first-party purchase and logistics data, marketers can use this to guide influencer selection and inform campaign strategies by identifying influencers with followers in specific cities and region to run campaigns in and even how content should be created for a specific region.

To round things up, there will definitely be more data points for marketers to tap on in the future to run more effective influencer marketing campaigns.

Influencers

Being able to understand data will become a critical skill set for influencers in the future. This is not just limited to understanding influencer marketing campaign performance and plan improvements, but also in better understanding what drives followers and subscribers.

Understanding this data will also help you to plan any secondary ventures, be it launching your own brands or other monetization means.

The rise of social commerce and conversational commerce will also likely give rise not just to closer connections with your followers, but also to data points that were not readily available in the past.

Ultimately, all influencers will need to have a strong grasp of your data to create value propositions for both brands and followers alike.

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