

CITIZEN INCLUSIVE INFLUENCER INDEX

**A Study On Authentic
Inclusive Influencer Marketing**

2022

EXECUTIVE SUMMARY

Citizen launches study on how brands can make influencer marketing more inclusive

Influencer marketing has grown rapidly to become one of the most important and effective ways that brands are reaching consumers. In fact, 93% of marketers now report using influencer marketing as a key component of their strategy.

While the value of influencer marketing is clear, many companies have struggled to build relationships with ethnically diverse customers and authentic connections with diverse influencers as part of their influencer campaigns, putting them at risk of missing out on some of the fastest growing segments of consumers. This also opens them up to criticism for inauthentic and tokenistic displays of diversity.

We wanted to connect the dots between consumer, content creator, and brand to provide insights that lead to creating inclusivity from behind and in front of the camera. To do that Citizen Relations established the Citizen Inclusive Influencer Index which surveyed nearly 2500 ethnically diverse consumers in 2022 and led focus groups with ethnically diverse influencers in the US and Canada.

Our research revealed four cornerstones of creating trust-centered, authentic, inclusive influencer marketing: connections, channels, content & commitment.

Connections

For marketing strategies to be successful they must name, recognize and reflect individual groups. For example, the term BIPOC has increasingly been used to simplify the collective identities of non-white people, and our research shows that the groups the term is referencing do not relate to it.

Our research also showed that consumers trust, follow and are highly influenced by creators that they can directly identify with.

- Only 35% of LatinX and 42% of South Asian respondents say they identify with the term BIPOC.
- 65% of consumers trust creators of their own ethnicity and 62% of ethnically diverse consumers report following more people of their own ethnic group.
- Black, Latinx, and Indigenous social media users (60%, 59% and 57%, respectively) are more likely than White users (39%) to say that social media is important to them for finding others who share their views on important issues.

Channels

While differences in the use of social media platforms between sexes and age are well known, little research has been done on ethnicity based differences between the platforms. Our research uncovered key insights in how different communities are gravitating towards different social channels:

- Ethnically diverse users head to YouTube more often and in larger numbers than any other social network. We anticipate this trend will continue considering shifts in demographics. To continue to attract these highly engaged communities, marketers should prioritize multicultural content and creators.
- Black and South Asian consumers are more active users of Twitter and Snapchat than any other groups, while TikTok has become a go-to for Latinx and Native/Indigenous consumers. Indigenous communities are using TikTok as a way to preserve their culture and, along the way, gaining thousands of followers.



EXECUTIVE SUMMARY

Content

Ethnically diverse content creators in our focus groups spoke at length about the disconnect between the messaging brands are asking them to use in their content, and the audience they want to connect with.

“It feels fake, when it is completely scripted, when the brand has taken complete control over what they want, over how they want it to look, over what you wear. I am arguing with a brand right now that wants me to wear leopard prints, if you look at my platforms I don’t wear prints ever.It’s going to tank, people don’t associate that with me.”

- Citizen Inclusive Influencer Index Focus Group Participant

Instead of pushing influencers to use scripted messaging and ingenuine product placement, brands need to be focused on partnership and co-creation, giving influencers the opportunity to generate content in their own voice, a voice that is trusted by the consumers the brand is trying to reach.

What This Means For Marketers

Influencer marketing has been shown to increase website traffic, but one of the things keeping most marketers up at night is conversion. As people spend more time on social media and the internet, the entire commerce journey is now happening online. As such, influencers are driving not only product discovery but conversions too.

However, with increasingly diverse and discerning consumers, brands are also grappling with how to build relationships that lead to loyalty. If it’s loyalty and long-term impact you’re after, it’s best to invest in building relationships and more custom, thoughtful and community-reflective content.

To unpack what it takes to create inclusive influencer marketing campaigns that authentically connect with ethnically diverse consumers it is necessary to go beyond understanding the consumers. It is also vital to understand how ethnically diverse influencers were being engaged by brands. Influencers create the content that consumers choose to engage with or not engage with.

By focusing on the cornerstones of connection, channels and content, brands will be able to develop campaigns that are more inclusive and more effective.

Commitment

The best brand partnerships are ones that are nurtured over a long period of time with intent and desire from both parties to work together continuously. Repeated content collaborations further brand loyalty and are more likely to deliver lasting results. However, commitment goes beyond the influencers you hire, it also includes how you run your business behind the scenes.

“That’s the core of social media, core of marketing, you are trying to build a relationship with your audience. So I don’t understand why the brand wouldn’t want to build a relationship with the influencers who are promoting their product.”

- Eugenia Perozo, Explora Miami, Lifestyle Influencer



Message from Citizen's CEO:

It wasn't until the Black Lives Matter movement addressed the depths of race-based violence in 2020 that I started to really understand the fact of my white privilege. Growing up, I associated privilege with wealth rather than race - it was a narrow definition I've since reconciled with reality. I sought out the education I needed to understand and embrace what equity actually means, and at Citizen, we're making big moves to champion those types of efforts. The responsibility of teaching EDI does not fall on the shoulders of the diverse people on our teams - that job is ours; those with privilege.

Practicing equity in the workplace is not a one-and-done project, it is a living thing. And while the steps we've taken at Citizen so far are encouraging for our future, I also know that we still have a lot of work to do. As companies, as brands, and as employers of human beings, we have to be transparent and address our blindspots so that we can improve on them. Systemic change doesn't happen overnight, it requires commitment, resources, focus, and follow-through.

The term BIPOC was created in an effort to simplify the collective identities of non-white people, for the convenience of white people. There exists a natural tendency to generalize, but cultural and ethnic experience is not something that goes in boxes: it's complex, nuanced, and always evolving. Case in point, we surveyed ethnically diverse people for this study, and learned that BIPOC is actually an inaccurate descriptor that many do not relate to. There are insights from this study that have both validated our recent inclusivity efforts, and revealed to us areas in which we can do even better. All in all, I believe the findings of this study have the potential to change how we think about influencer marketing, and we are eager to get to work. We hope you are too.

Nick Cowling



Message from Citizen's EVP Social Impact:

Growing up I didn't see myself in the world around me, in the stories being told, in the media, or in magazine images. The closest representation my family and I saw for ourselves was the Cosby show, and that's a big, BIG stretch, but at that time those stretches were necessary for ethnically diverse people to fit into something that resembled the norm. I wanted meatloaf for dinner like the other kids, to go to church instead of a mandir, and for my name to be Sara. The desire to change my name came to an end in highschool when I had to repeatedly remind my water polo coach that my name was SHILPA not SHEILA. I began to stand my ground at that time in life, even though it seemed like I was largely absent in the world around me I was determined to find a place for me and others like me.

Now, as our Equity, Diversity and Inclusion and Social Impact Team begins to engage with creatives, communicators, and marketers who shape and tell stories, we push them to dig deeper into insights, to layer it with lived experiences, to step into what is unknown to them. We realized this was the one way we could ensure the world was representative - for nuance to be maintained, and complexity embraced.

Shilpa Tiwari



ESZEN

SECTION ONE:
WHY THIS
STUDY?

SECTION ONE

WHY THIS STUDY?

The pace at which cultural, economic and social landscapes are evolving has required brands to shift their PR and social media strategies in significant ways. Today's discerning, and increasingly diverse, consumers are vocal about their expectations from brands - they want to see themselves and their realities authentically portrayed in a brand's marketing. Consumers want brands to build authentic relationships with them.

This study is a result of the lack of data on how ethnically diverse consumers use and engage with a brand's marketing through social media. We saw that companies were missing the mark, but without data it is challenging to understand how to do things differently. By listening to the communities brands wish to build relationships with, they have the opportunity to authentically bring stories to life through their marketing efforts. We chose to focus on influencer marketing because it has gained prominence as a means to cut through a noisy landscape, to build relationships, and to ultimately create the trust that consumers are seeking.

Citizen Relations conducted a survey (hereafter referred to as Citizen Inclusive Influencer Index) of nearly 2500 ethnically diverse consumers in 2022 and led focus groups with ethnically diverse influencers in the US and Canada. We did this to connect the dots between consumer, content creator, and brand to provide insights that lead to creating inclusivity from behind and in front of the camera.

Our research revealed four cornerstones of creating trust-centered, authentic, inclusive influencer marketing: **connections, channels, content, commitment.**

SECTION ONE

WHY THIS STUDY

1.1

Inclusive marketing is *the* strategy.

The spaces we inhabit and navigate are becoming more diverse, interconnected, and complex. Companies must be thoughtful about the messages and values they articulate through facets of language like tone, imagery, and voices – the very things that represent their brand.

Consumers want brands to truly understand them, and because the consumer base across Canada and the US is increasingly diverse, the call to create more targeted and inclusive marketing content is stronger than ever.

Content that reflects the target consumer authentically is more effective in influencing consumer behavior. Over two-thirds (69%) of Black consumers say they are more likely to be persuaded to buy a product or service from a brand whose communication strategy authentically reflects their ethnicity. Inclusive marketing is not new; Coca-Cola's iconic 'Hilltop' advertising was one of the first to embrace people in the real world, and mirrored its consumers. In 1971, two years after Dr. King's assassination, 'I'd like to buy the world a Coke' was hopeful and refreshing.

Rihanna's brand, Fenty Beauty, was an early adopter when it came to brands taking a radical approach to inclusivity. With the goal of targeting women across cultural and ethnic backgrounds, Fenty Beauty launched in fall 2017 with 40 foundation shades. Roughly a year and a half later, the brand expanded the range to 50 shades, a brilliant example of what it takes to embrace complexity. By largely bypassing traditional media and relying almost exclusively on social media for its marketing campaigns, the brand reaches an audience that was previously ignored, and lives up to its "Beauty for All" brand ambition.

What about the ROI? Just a few months after Fenty Beauty's launch, the brand was named Time magazine's "Inventions of the Year" based on its broad shade range and use of diverse models in its marketing campaigns. Consumer response was enthusiastic to say the least, with the brand taking in US\$72 million in its first month (five times the revenues of its closest peer competitor). Fenty Beauty's darker shades consistently sell out, spurring competitors into offering increased shade ranges resulting in the "Fenty Effect". So why was Rihanna's brand so successful? For one, it

emotionally connected with women who felt left out in other makeup lines. Also by focusing on women of all ethnicities it proved that people of color can be successful. Overall, the beauty industry learned that without inclusivity and diversity, there is no growth strategy.

In 2019, Adobe conducted a research report that showed 61% of consumers find diversity in advertising important, and 38% of consumers are more likely to trust brands that have ethnic diversity in their ads. They also found that 64% of consumers surveyed said that they took some sort of action after seeing an ad they considered to be diverse or inclusive.

Diversity, inclusion, and belonging are important to customers, even more so when they or someone in their circle is a part of a diverse group. But stereotypes, superficiality, tone deafness, and cultural insensitivity run rampant in many campaigns.



SECTION ONE

WHY THIS STUDY

1.2 Moving from relationships *matter* to relationships are *EVERYTHING* with influencer marketing.

Since 2017, online searches for the term “influencer marketing” have increased 405% with the market expected to grow to be valued at 16.9B by the end of 2022, making influencer marketing a go-to strategy for many B2C brands. In fact, 93% of marketers report using influencer marketing as a key component of their strategy.

Thing that keeps most marketers up at night is conversion, and influencer marketing delivers on conversion. Inmar reported that 84% of people had made a purchase as a result of an influencer recommendation. The relationship influencers have with their audience is one that can spur results beyond just awareness, it exposes more potential customers to the sales funnel for your brand.

It’s estimated that 92% of consumers trust word-of-mouth recommendations above other sources, and 61% of people specifically trust influencer recommendations above brand-owned content such as ads. Influencers are not strangers to their followers, these social media personalities are trusted advocates.

Influencers are well positioned to promote brands due to their heightened social presence and their ability to familiarize with their audiences. If an influencer is prepared to align themselves with a product or service, it gives their faithful audience reassurance that the brand is at least somewhat genuine.

Trust is one of the main reasons behind the phenomenon of using influencers: influencers’ connection with individuals makes it possible to access a loyal and engaged audience or community and, when done right, results in brand authenticity.

While the value of influencer marketing is evident, many companies continue to struggle to build relationships with both ethnically diverse customers and ethnically diverse influencers, facing criticism for inauthentic and tokenistic displays of diversity.

Many creators have voiced their concerns about brand bias and lack of representation in the influencer industry. For example, YouTuber Daniella Perkins amassed over 1 million views on a video exposing the racial discrimination she experienced while attending Coachella, a music and arts festival, while she was a part of a beauty brand collaboration in 2019. Her experience prompted influencers from multiple ethnic backgrounds to speak out about the mistreatment of ethnically diverse influencers. Following this, the beauty brand vowed to avoid “selective” diversity in its influencer choices.

Events of 2020 put a spotlight on social justice, inequality, and the importance of equity, diversity, and inclusion. Prompted by the Black Lives Matter movement and #StopAsianHate, influencers vocalized concerns about the lack of diversity and excessive tokenism within the influencer industry. Ethnically diverse influencers are also speaking out about pay gaps, and exclusion from notable opportunities.

As the consumer population diversifies — by race and ethnicity, sexual orientation, differences in ability, etc. — it’s imperative for brands to authentically reflect a range of backgrounds and experiences within their messaging if they expect to effectively connect with future customers through influencer marketing.





ESZEN

SECTION TWO:
DIVING INTO
THE DETAILS

SECTION TWO

DIVING INTO THE DETAILS

2.1

Connections

Past: Know your CUSTOMER.

Present: Know your customer SEGMENT

The term BIPOC first made its appearance in 2013 as a way to highlight the unique relationship to Whiteness that Indigenous and Black (African Americans) people have which shapes the experiences of, and relationship to, White supremacy for all people of color within a U.S. context. However, as with all language that label groups of people under one umbrella term, society's relationship with the term BIPOC is complicated. The introduction of BIPOC allowed for a shift away from terms like minority and marginalized which emphasized a power differential. However, our study found that many non-white racial and ethnic groups do not identify with the term BIPOC.

“People want to be named and recognized, not as part of an amalgam”

“It is lazy to lump us all together as if we all face the same problems. When you blend us all together like this, it’s erasure. It allows people to get away with not knowing people of color and our separate set of issues that we all face.”

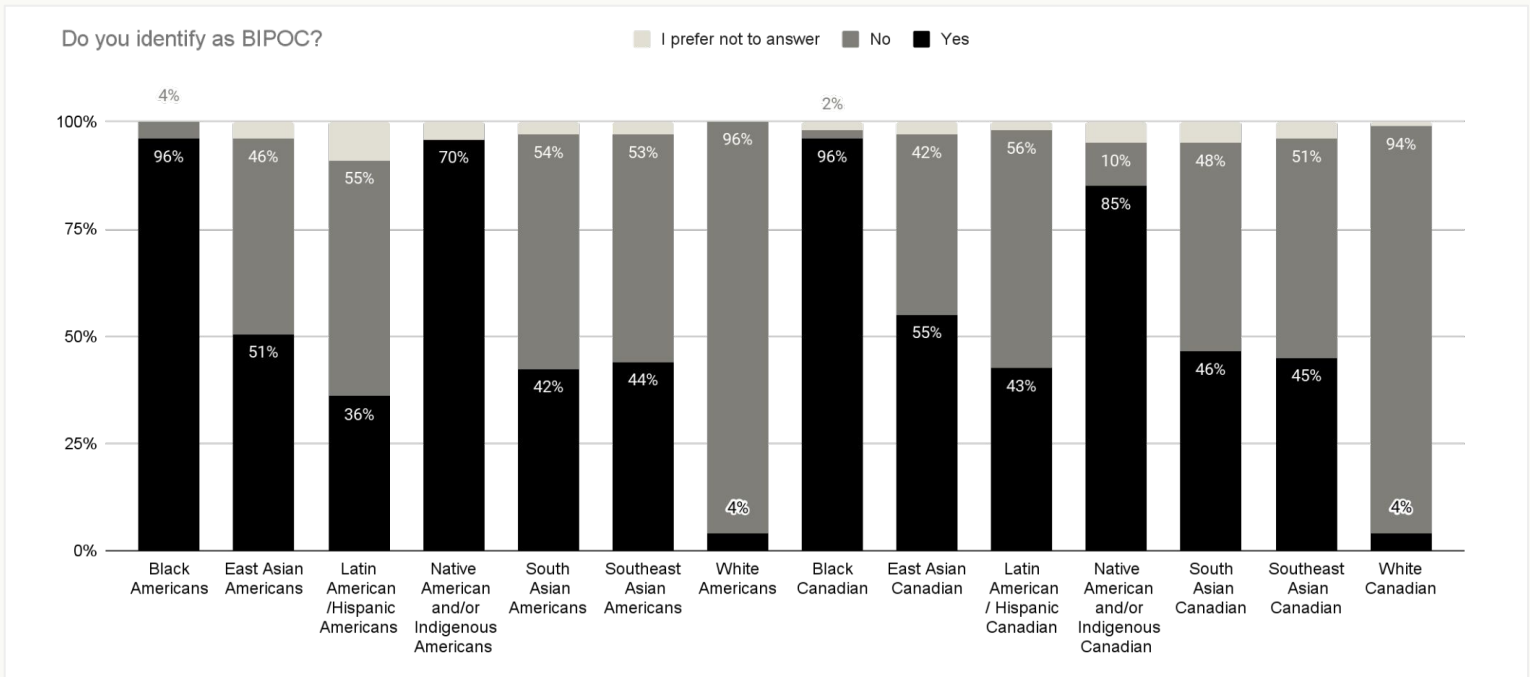
- Sylvia Obell, Host, *Okay, Now Listen*, podcast



SECTION TWO

DIVING INTO THE DETAILS

Splitting the data by US vs. Canada, we see that of all the non-white racial groups, Latinx individuals in the US and Canada are most likely to *not* identify as BIPOC



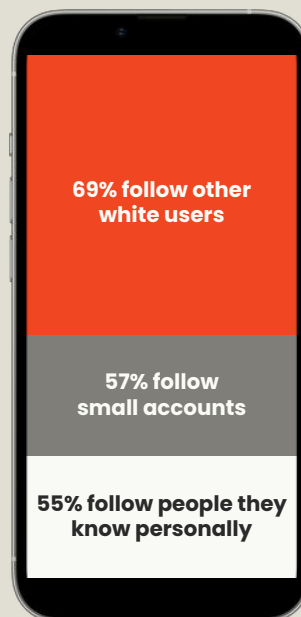
Q: Do you identify as a Black, Indigenous and/or Person of Colour? Base: n=201 Black Americans, n=85 East Asian Americans, n=304 Latin American/ Hispanic Americans, n=115 Native American and/or Indigenous Americans, n=59 South Asian Americans, n=68 Southeast Asian Americans, n=201 White Americans, n=200 Black Canadians, n=199 East Asian Canadians, n=54 Latinx, n=103 Native and/or Indigenous Canadians, n=200 South Asian Canadians, n=82 Southeast Asian Canadians, n=200 White Canadians Source: Citizen Inclusive Influencer Index, May 2022.

Brands must strategically engage with the target audience by identifying their language, dialect, interests, location, and the factors which make them unique. Inclusivity goes beyond skin tone and gender identity. Food, family, culture, stories, language, and many more factors contribute to diversity and a feeling of belonging. As a result, simply casting an ethnically diverse group of creators does not make a brand inclusive.

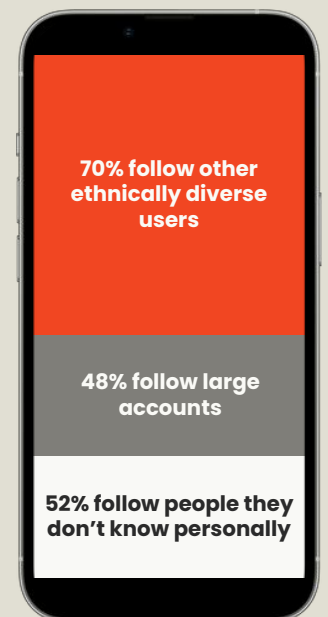
Conversations surrounding diversity and inclusion continue to unfold and the language we use to describe race and racial experience is expanding. How do we thoughtfully navigate evolving language to include the ways in which people would like to be identified? It is clear that people identify more with their individual ethnic and cultural communities than they do skin shade.

**A closer look:
Who do you follow?**

The Instagram Feed of a White Consumer



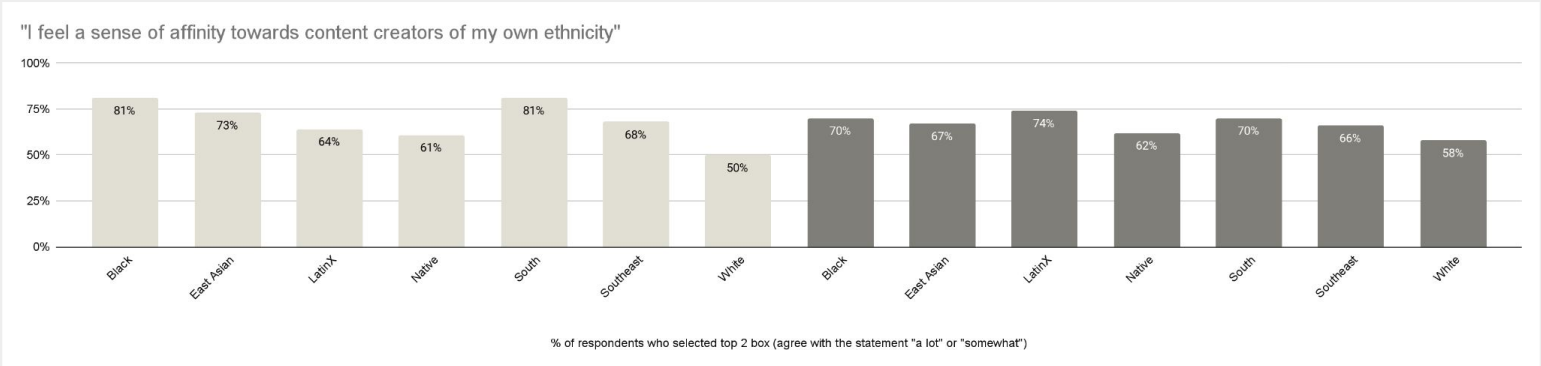
The Instagram Feed of an Ethnically Diverse Consumer



Q: We have a mini-exercise for you. Open your [main social media - Instagram] app or website and take a look at the list of people you follow / subscribe to. How would you describe the people you see? Base: respondents whose main social media is Instagram (n=467 BIPOC respondents, n=167 White respondents) Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

An overwhelming number of consumers surveyed noted that they relate to, and feel close to, content creators of their own ethnic group.

Consumers feel the most connected to creators that share their ethnic background



Q: Think of [content creators of my own ethnic group/ cultural identity]. To what extent do you agree with the following statements? Statement: "I feel a sense of affinity with content creators of my own ethnicity." **Base:** n=201 Black Americans, n=85 East Asian Americans, n=304, Latinx, n=115 Native American and/or Indigenous Americans, n=59 South Asian Americans, n=68 Southeast Asian Americans, n=201 White Americans, n=200 Black Canadians, n=199 East Asian Canadians, n=54 Latinx=103 Native and/or Indigenous Canadians, n=200 South Asian Canadians, n=82 Southeast Asian Canadians, n=200 White Canadians **Source:** Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

VERSUS

65% **TRUST** creators from their own ethnicity

56% **TRUST** in all content creators, in general

70% **IDENTIFY** with creators from their own ethnicity

61% **IDENTIFY** with content creators, in general

Q: We have a mini-exercise for you. Open your [main social media] app or website and take a look at the list of people you follow / subscribe to. How would you describe the people you see?
Base: all respondents (n=2,242)
Source: Citizen EDI Influencer Index, May 2022

Q: Think of [PIPE-IN CATEGORY]. To what extent do you agree with the following statements?
Base: all respondents (n=2,242)
Source: Citizen EDI Influencer Index, May 2022

62% ethnically diverse consumers report following more people of their own ethnic group on their feeds.

Q: We have a mini-exercise for you. Open your [main social media] app or website and take a look at the list of people you follow / subscribe to. How would you describe the people you see?
Base: respondents who identify as BIPOC (n=1126 respondents)
Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

SECTION TWO

DIVING INTO THE DETAILS

When we asked consumers to name their favorite content creator, they were most likely to name a creator of their own ethnicity, with the exception being Native/Indigenous respondents.



This is true for every racial/ethnic group we analyzed.

To your knowledge, what is the racial identity of your favorite content creator?	Black Respondents	East Asian Respondents	LatinX Respondents	Native/Indigenous Respondents	South Asian Respondents	Southeast Asian Respondents	White Respondents
Black ^a	71%	3%	4%	13%	3%	5%	3%
East Asian	2%	49%	4%	4%	3%	13%	1%
LatinX	2%	2%	64%	6%	5%	3%	4%
Native/Indigenous	0%	0%	1%	32%	0%	1%	0%
South Asian	0%	2%	1%	0%	54%	2%	0%
Southeast Asian	1%	5%	1%	1%	4%	41%	0%
White	16%	31%	20%	38%	26%	25% B	84%

Q: To your knowledge, what is the racial identity of [your favorite content creator]?

Bases: n=401 Black respondents, n=284 East Asian respondents, n=358 LatinX respondents, n=218 Native and/or Indigenous respondents, n=259 South Asian respondents, n=150 Southeast Asian respondents, n=401 White respondents

Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

SECTION TWO

DIVING INTO THE DETAILS

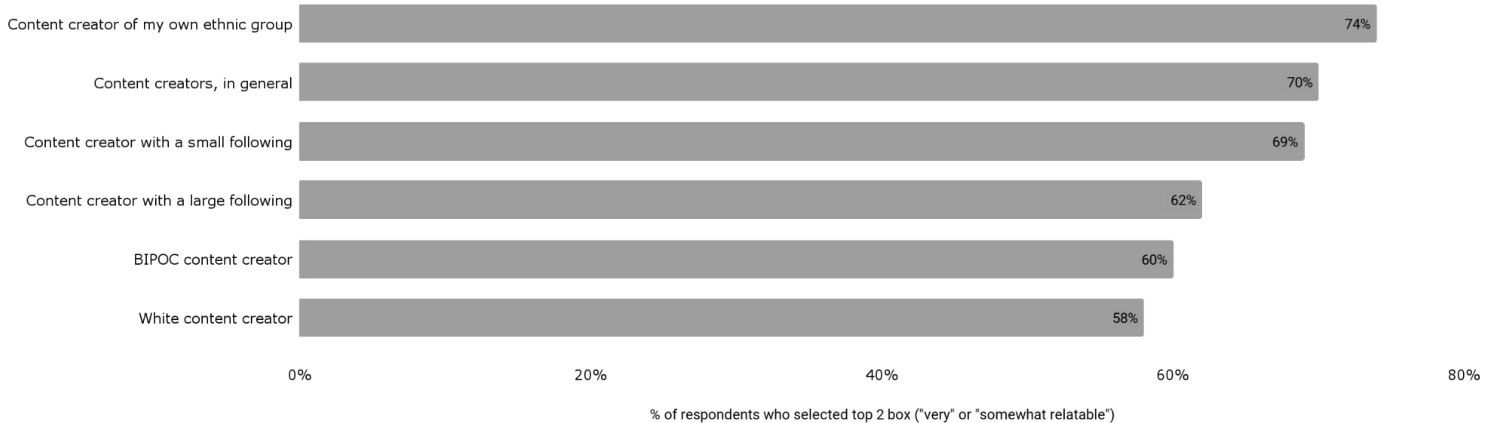
Despite significant interest in social media-based interactions between consumers and brands, little is known about how ethnicity impacts consumers' comment intention on social media. Our study found that ethnically diverse consumers are more likely to relate to the sponsored content of influencers from their own ethnic group. This relatability results in the commenting on, and sharing, of sponsored posts.

Influencers have generally built their audience from scratch. They understand their followers, who return as long as the influencer remains authentic. This is particularly evident when somebody shares some of the influencer's content. By sharing the content, they are prepared to vouch for the influencer's authenticity to their friends.



Likelihood of sharing content from influencers of the same ethnic group

Do you perceive sponsored content from these different groups of content creators as relatable?



Q: Do you perceive sponsored content from these different groups of content creators as relatable? (Note: Sponsored content is defined as a post, tweet, story, TikTok video, etc. made by a content creator in which they mention a company, brand, or product, for which they received compensation from said company.)

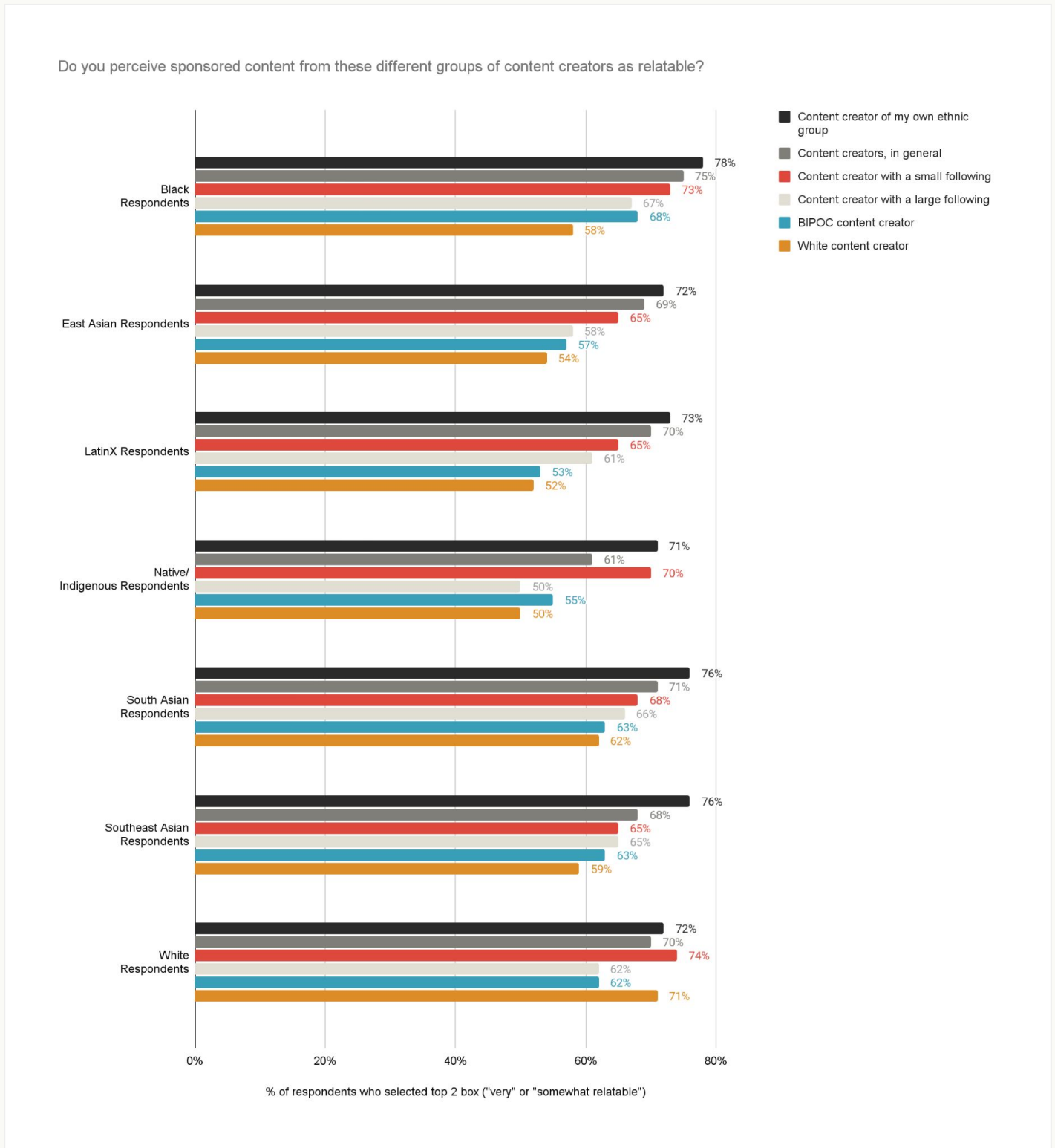
Base: all respondents (n=2,242)

Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

SECTION TWO

DIVING INTO THE DETAILS

When we look at the answers to this question by ethnicity, we see that Black consumers are more open to sponsored content, whereas Native/Indigenous consumers relate the least to sponsored content

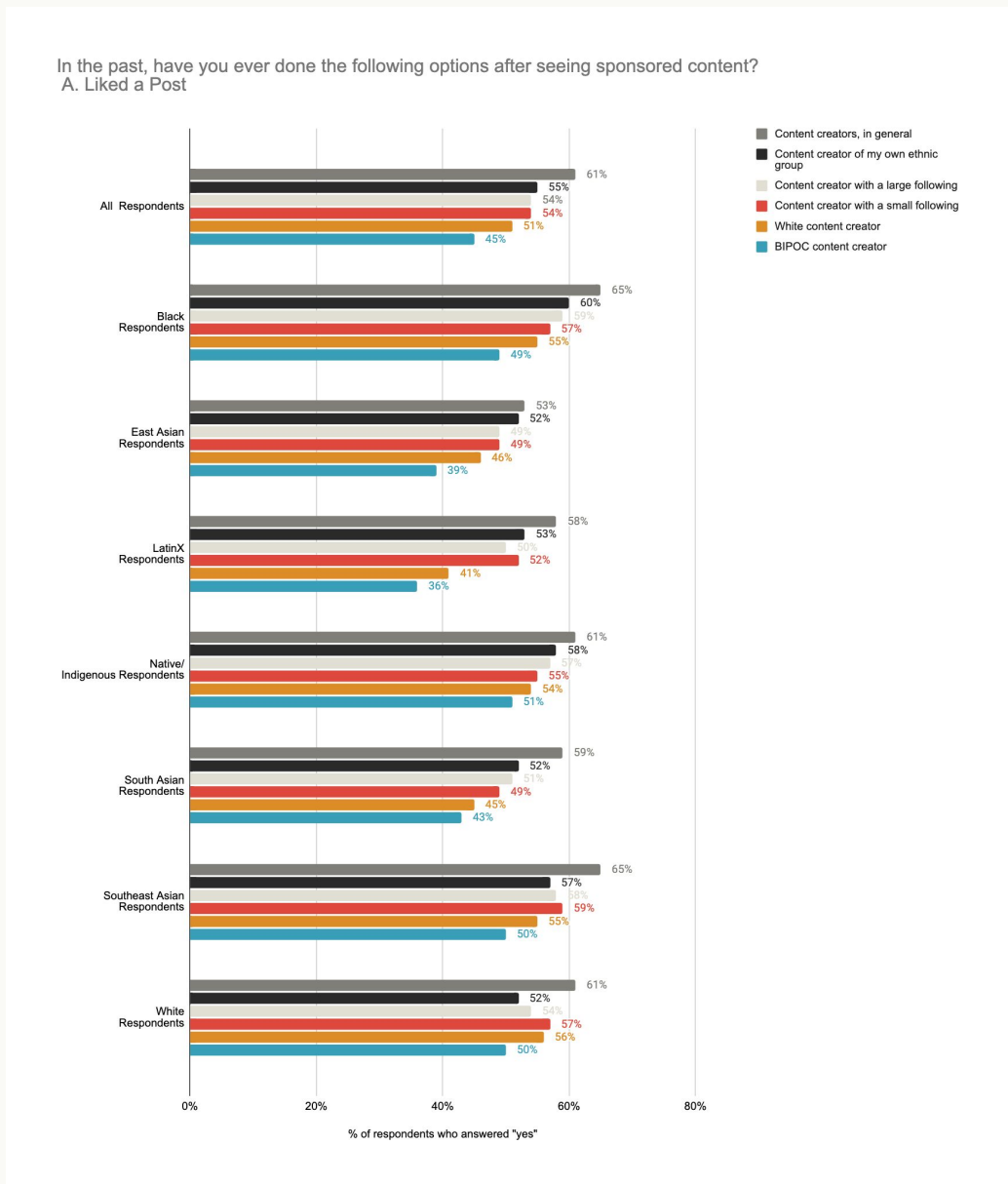


Q: Do you perceive sponsored content from these different groups of content creators as relatable? (Note: Sponsored content is defined as a post, tweet, story, tik tok video, etc. made by a content creator in which they mention a company, brand, or product, for which they received compensation from said company.)
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Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

SECTION TWO

DIVING INTO THE DETAILS

Black and Southeast Asian respondents are most likely to “like” sponsored posts. East Asian, Latinx and South Asian consumers are least likely to “like” sponsored posts.



Q: In the past, have you ever done the following actions after seeing sponsored content: liked the post. (Note: Sponsored content is defined as a post, tweet, story, tik tok video, etc. made by a content creator in which they mention a company, brand, or product, for which they received compensation from said company.)
 Base: n=401 Black respondents, n=284 East Asian respondents, n=358 LatinX respondents, n=218 Native and/or Indigenous respondents, n=259 South Asian respondents, n=150 Southeast Asian respondents, n=401 White respondents
 Source: Impact of BIPOC Influencers on BIPOC Consumers Survey, May 2022.

Will I lose my current customer base by changing aspects of my brand? No.

While the study shows that brands connect with ethnic consumers more effectively through creators of their respective communities, doing so isn't costing them White consumers. In fact, white consumers feel the same level of trust and esteem for all content creators, regardless of ethnicity and actually have high trust and esteem for ethnically diverse content creators.

SECTION TWO

DIVING INTO THE DETAILS

2.2

Channels

Past: Dating.

Present: Online dating

The most effective social media strategies are informed by demographics. These data-driven insights will help ensure that your strategy facilitates the most relevant, targeted approach possible, and increase your chances of conversion.

[Pew Research](#) published information on how different social media platforms are used. The differences in activity between sexes are well-known. More women use Facebook, Instagram, and Pinterest than men. On the other hand, more men are using LinkedIn, Twitter, YouTube, WhatsApp, and Reddit. However, little research has been done on ethnicity based differences between the platforms.

What we now know is that Instagram is particularly popular with non-Whites. Half of Latinx and 40% of Black people use Instagram, compared to only 33% of White people. Black, Hispanic, and Indigenous social media users (60%, 59% and 57%, respectively) are more likely than White users (39%) to say that social media is important to them for finding others who share their views on important issues.

For Indigenous respondents, access to creative arts, Indigenous storytelling, and being able to make contact with community members and services were some of the positive aspects of social media. Another positive was the ability to engage in political conversations – that is, to raise issues that are important to Indigenous people which may not receive adequate attention on traditional media channels.

“I think it’s a huge knowledge-sharing network. This is where I go to find out what’s happening in Indian country. This is where I find a lot of information and how other Indigenous folks are feeling about things. We don’t get a lot of exposure in mainstream media.”

– Lynn Marie Angus, person of Gitxaala, Nisga’a, Cree, and Metis Nations

The findings of this study, and captured in the tables provided on pages 18,19 and 20, inform a more finely tuned approach to selecting content creators to reach specific target segments. By ethnic background, the study shows us several things about the survey participants:

- what content topics are being searched,
- the size of content creators that are being followed,
- and how often sponsored content is being engaged with.

This allows for more accurate targeting when considering elements of a campaign such as social media platforms, collaboration partners, and messaging tones. The fine tuning includes: ethnicities of content creators, location of content creators, size of following of content creators and ideal social media platforms.



SECTION TWO

DIVING INTO THE DETAILS

Understanding what platforms are popular by ethnicity

Average hours per week	Total	Black	East Asian	Latinx	Native/Indigenous	South Asian	Southeast Asian	White
YouTube	9.50	10.66	10.08	9.25	8.47	10.28	9.50	7.93
Instagram	7.63	8.70	7.27	7.75	5.65	8.85	7.43	7.13
Facebook	6.48	5.95	4.40	7.75	7.00	5.81	6.48	7.34
TikTok	5.52	5.76	3.38	6.76	6.02	5.64	4.05	5.64
Snapchat	3.54	4.19	1.80	3.51	3.66	4.59	2.44	3.90
Twitter	3.33	4.16	2.59	3.61	2.39	4.08	3.42	2.95

Topics of Interest on Facebook

	Total	Black	East Asian	Latinx	Native/Indigenous	South Asian	Southeast Asian	White
Family and relationships	43%	41%	33%	41%	45%	41%	47%	51%
Entertainment	40%	43%	29%	43%	46%	41%	44%	40%
Lifestyle	37%	37%	32%	41%	40%	40%	37%	35%
Food and drink	34%	32%	32%	38%	34%	32%	36%	33%
Hobbies and activities	31%	26%	21%	32%	40%	31%	27%	34%
Beauty-fashion	29%	30%	18%	39%	29%	32%	29%	24%
Travel	24%	21%	24%	26%	22%	31%	32%	21%
Fitness and wellness	22%	24%	16%	24%	23%	27%	22%	23%
Politics and social issues	22%	21%	18%	17%	23%	25%	26%	24%
Gaming	21%	19%	16%	27%	28%	22%	21%	18%
Design and home decor	20%	20%	13%	24%	23%	22%	22%	18%
Sports and outdoors	20%	19%	14%	20%	21%	24%	18%	22%
Technology	19%	17%	18%	22%	19%	24%	18%	16%
Business	18%	23%	17%	19%	12%	19%	19%	15%
Other	10%	10%	8%	9%	12%	9%	12%	10%

Topics of Interest on Instagram

	Total	Black	East Asian	Latinx	Native/ Indigenous	South Asian	Southeast Asian	White
Lifestyle	55%	58%	58%	59%	48%	57%	59%	49%
Beauty-fashion	54%	57%	45%	60%	44%	61%	62%	47%
Entertainment	50%	58%	44%	52%	48%	54%	51%	44%
Food and drink	49%	47%	55%	51%	44%	54%	53%	42%
Hobbies and activities	42%	41%	41%	41%	43%	44%	47%	39%
Family and relationships	39%	42%	31%	38%	41%	41%	42%	41%
Travel	39%	40%	44%	35%	38%	46%	48%	34%
Fitness and wellness	37%	42%	33%	38%	28%	42%	41%	37%
Design and home decor	36%	35%	36%	37%	35%	38%	38%	34%
Sports and outdoors	25%	27%	27%	23%	22%	31%	25%	25%
Technology	23%	26%	24%	21%	18%	31%	29%	17%
Gaming	21%	19%	23%	20%	25%	22%	19%	19%
Business	20%	27%	18%	19%	14%	25%	23%	17%
Politics and social issues	18%	21%	16%	14%	17%	22%	19%	20%
Other	11%	8%	10%	11%	14%	13%	12%	11%

Topics of Interest on Twitter

	Total	Black	East Asian	Latinx	Native/ Indigenous	South Asian	Southeast Asian	White
Entertainment	28%	36%	27%	27%	28%	29%	29%	24%
Politics and social issues	25%	27%	23%	23%	20%	35%	24%	23%
Hobbies and activities	16%	21%	18%	13%	12%	19%	17%	15%
Technology	15%	18%	19%	11%	9%	19%	18%	14%
Business	15%	18%	17%	13%	7%	24%	14%	12%
Gaming	15%	15%	17%	16%	13%	12%	15%	14%
Lifestyle	14%	19%	17%	12%	10%	15%	16%	12%
Sports and outdoors	14%	17%	13%	10%	11%	18%	9%	15%
Food and drink	14%	17%	14%	11%	10%	17%	13%	12%
Family and relationships	13%	16%	12%	12%	9%	15%	9%	13%
Beauty-fashion	11%	13%	11%	11%	7%	13%	14%	9%
Travel	11%	13%	15%	9%	7%	13%	12%	11%
Fitness and wellness	11%	13%	11%	9%	8%	15%	12%	9%
Other	8%	10%	6%	6%	10%	12%	11%	7%
Design and home decor	8%	10%	8%	6%	5%	12%	7%	8%

Topics of Interest on TikTok

	Total	Black	East Asian	Latinx	Native/ Indigenous	South Asian	Southeast Asian	White
Entertainment	44%	50%	31%	52%	51%	37%	39%	43%
Beauty-fashion	33%	33%	24%	43%	36%	32%	27%	33%
Food and drink	33%	31%	28%	42%	41%	28%	30%	30%
Lifestyle	33%	34%	26%	43%	38%	28%	23%	33%
Hobbies and activities	31%	31%	20%	37%	38%	29%	19%	33%
Fitness and wellness	25%	25%	15%	31%	28%	27%	17%	27%
Design and home decor	25%	25%	16%	31%	30%	25%	19%	24%
Travel	24%	26%	18%	28%	25%	24%	23%	23%
Family and relationships	22%	23%	13%	26%	23%	20%	19%	22%
Gaming	19%	18%	17%	23%	27%	14%	15%	21%
Technology	19%	21%	15%	21%	22%	19%	13%	18%
Sports and outdoors	16%	18%	12%	20%	17%	15%	11%	18%
Politics and social issues	16%	16%	11%	16%	21%	15%	13%	17%
Business	14%	17%	9%	16%	14%	16%	11%	10%
Other	8%	9%	6%	9%	9%	8%	7%	8%

Topics of Interest on YouTube

	Total	Black	East Asian	Latinx	Native/ Indigenous	South Asian	Southeast Asian	White
Entertainment	59%	61%	54%	59%	61%	66%	63%	49%
Food and drink	42%	46%	49%	45%	35%	48%	49%	29%
Hobbies and activities	40%	38%	43%	36%	44%	44%	46%	36%
Lifestyle	40%	46%	43%	41%	35%	46%	42%	30%
Gaming	37%	39%	39%	36%	45%	35%	44%	29%
Beauty-fashion	36%	42%	31%	38%	35%	43%	43%	26%
Fitness and wellness	35%	35%	36%	36%	28%	45%	37%	28%
Travel	33%	32%	41%	31%	26%	42%	41%	25%
Technology	32%	34%	33%	31%	29%	39%	35%	24%
Design and home decor	29%	34%	25%	30%	24%	38%	31%	22%
Sports and outdoors	27%	28%	27%	25%	26%	37%	33%	19%
Politics and social issues	25%	28%	20%	21%	23%	32%	27%	22%
Business	23%	27%	24%	22%	20%	33%	27%	14%
Family and relationships	23%	27%	18%	23%	19%	31%	22%	17%
Other	14%	12%	9%	15%	17%	14%	17%	13%

SECTION TWO

DIVING INTO THE DETAILS

2.3

Content

Past: Customers hope.

Present: Customers expect.

In 1996, Bill Gates published an article titled Content Is King in which he forecasted that content is where “much of the real money will be made on the internet.” Twenty-six years later, this couldn’t be more true.

It’s not just about sheer quantity of content. It’s about how inclusive each piece of content and its delivery is. Instead of pushing new brand ambassadors to go on with your brand slogans, give influencers the opportunity to generate content in their own voice. They will contribute to your brand message by storytelling in more ways than you can on your own. What a lot of traditional media outlets are struggling to accept is that consumers simply don’t want to see advertising. Consumers are, first and foremost, people — and people are primarily interested in content.

Co-creation separates cookie-cutter content from a powerful point of view without sacrificing key brand messaging. In the most successful influencer partnerships, brands intentionally leverage the influencer’s expertise in content creation and audience engagement rather than being overly prescriptive in the briefing process.

In our focus groups, we dug deeper into how brands engage with influencers around content creation. All influencers spoke of the disconnect between what brands are seeking and the audience they want to connect with. Rather than lean into the influencer’s knowledge of the demographic, they are often given prescribed content to push, even if it isn’t relevant to the influencer’s brand or audience.

“If you have me using all these words, words that nobody uses, to describe a lotion – I mean come on, I don’t speak to my homegirls like that”.

- Tina Meeks, Her Like Sparkles, Lifestyle Influencer

When asked if they felt that there was a lack of understanding of the audience, influencers state that there isn’t diversity at executive levels, resulting in a deep disconnect.

When a brand has influencers promoting content that is prescribed “or straight PR language for a lotion,” how does the audience engage with the content? Our findings show it almost always affects the performance. Influencers can recognize brands that allow them to be themselves, versus just another face of the brand.



SECTION TWO

DIVING INTO THE DETAILS

2.4

Commitment**Past: Great products.****Present: Great values.**

Don't think of influencer marketing as a quick smash and grab, think of it as building relationships with people over a long period of time, for the benefit of both of your brands. The goal isn't a shallow and fleeting promotion. Be prepared to invest in the process and communicate you're looking for long term partnership and results.

“That’s the core of social media, core of marketing, you are trying to build a relationship with your audience. So I don’t understand why the brand wouldn’t want to build a relationship with the influencers who are promoting their product.”

- Citizen Inclusive Influencer Index Focus Group Participant

The best brand partnerships are ones that are nurtured over a long period of time with intent and desire from both parties to work together continuously. Repeated content collaborations further brand loyalty and are more likely to deliver lasting results.

“I had a year-long campaign last year, and it was amazing. The brand expanded into plus size, and they did it in such a way that felt so empowering to me to be able to share that kind of content. I am a big hiker and love nature and a lot of the content I created was around that. It was authentic to who I am and what I am doing on my platform and it resonated with my audience. “

- “Citizen Inclusive Influencer Index Focus Group Participant

Commitment goes beyond the influencers you hire, it also includes how you run your business behind the scenes. Appealing to the loyalties of future customers can require brands to demonstrate they are promoting equitable outcomes in all their areas of influence: via hiring and retention, using diverse suppliers, or marketing products for users of differing abilities.

Data tells us that high-growth brands are more frequently establishing key performance metrics for equity, diversity, and inclusion (EDI) objectives than their lower-growth competitors. Thirty eight percent (38%) of high-growth organizations have established equity, diversity, and inclusion metrics for their brand messaging campaigns (versus 30% for negative-growth organizations).



SECTION THREE:
**INCLUSIVE
MARKETING IS
THE DEFAULT**

SECTION THREE

INCLUSIVE MARKETING IS THE DEFAULT

Our world is becoming increasingly diverse every day, with younger generations introducing new paradigms of consumerism and older generations evolving their purchase considerations. Marketers must evolve their strategy to truly represent the global customer's needs with a strategy that can bring local, personalized relevance. A wider spectrum of the population must be considered, included and represented in new and significant ways.

With ethnically diverse individuals making up about 40% of the population in the United States and about 30% in Canada, marketers miss out on a huge market opportunity by not including these communities in their advertising. As China and India make up 2.8 billion (and counting) of the world's population, inclusive marketing has never been more relevant.

This is also important to consider when it comes to marketing to Millennials. With "43% of the 75 million Millennials in the US identifying as African American, Latinx, or Asian, if a brand doesn't have a multicultural strategy, it doesn't have a growth strategy," according to a [Nielsen report](#).

A common pushback on Inclusive Marketing campaigns is that there's no additional budget. There's no need for additional budget if we spend the time to really understand who our customer is along with new trending consumer mindsets. A [recent study](#) measuring advertising performance among CPG brands found that brands that did not actively spend on Spanish language content received a lower return on ad spend than brands that did. This means brands that are not advertising in Spanish are missing out on the Latinx growth opportunity. Yet still, less than 500 advertisers invest in Spanish-language network television, compared to 1900 who advertise in English, leaving Americans who prefer to consume content and ads in Spanish without access to the same targeted brand communications.

A Spanish speaking, Miami based influencer spoke to us about how frustrating she finds it when brands insist that she speak English.

"Sometimes brands reach out to me and force me to speak English in their ads, their posts, or stories. It's embarrassing because it's not my first language, it's not how I talk to my audience everyday. I feel like another person when I have to create content in English. I don't understand why they want me to speak in English when my audience is Spanish."

- Eugenia Perozo, Explora Miami, Lifestyle Influencer

Interestingly over 60% of Miami's population speaks Spanish, meaning it would likely benefit the brand to have content in Spanish to build relationships with a growing audience.

By highlighting diversity alongside common human values that most people share (think coming-of-age challenges, love of family, desire for success, community building, music and dance) we capture the entire market while inviting diverse communities to feel understood and welcomed, rather than isolated. That is the power of inclusive storytelling strategy.

Marketers and content strategists have the unique opportunity to make a difference through the stories we tell, and how we tell them. We can elevate diverse voices and role models, decrease cultural bias, and lead positive social change using thoughtful and respectful content. Our responsibility as marketers is to relay brand messaging in a way that resonates with people from all backgrounds.

Beyond diversity, inclusive marketing can help to fix long-standing marginalization and underrepresentation, and forge genuine connections with those previously ignored customers.

SECTION THREE

INCLUSIVE MARKETING IS THE DEFAULT

3.1

Embedding inclusive thinking into your marketing efforts.

By focusing on the cornerstones of connection, channels, content and commitment, brands will be able to develop campaigns that are more inclusive and more effective. How do you ensure these cornerstones to inclusive influencer marketing are reflected in your marketing efforts? Ultimately it requires your marketing teams to take a step back and think about how they show up as a team, how they perceive the world around them, and what your team and organization are willing to commit to in terms of equity, diversity and inclusion as an organization.

Centering inclusion in your work starts with the team – who is at the table.

Inclusion isn't a box you check at the end of your creative process or just before you launch a campaign; inclusive choices need to be embedded throughout the process starting from the makeup of your team, developing the brief all the way through ideation and design.

Stories lived and told.

Think big, zoom out, refocus, and try to bring real stories to life, ensuring that the work you are doing reflects the diversity of your audience (and the audience doesn't necessarily look or think like you). Think about stories you haven't heard, images you haven't seen – this is bound to make your marketing efforts more interesting and inclusive. When bringing stories to life, dig deep and find cultural insights that bring nuance to your characters and share the lived experiences.

Commit.

Inclusive marketing must be a fundamental brand commitment. Just as exclusion has been deliberately orchestrated, inclusion must also be deliberately embedded, righting wrongs and reaching those who have not been considered before. It will not happen by accident. All too often, organizations will attempt to retrospectively fit inclusion into their marketing – either because of public backlash or realizing after launch something has been missed. That isn't good enough. Be proactive with this.

Citizen's Commitments to Inclusive Influencer Marketing

Both the findings and the opportunities identified in this study reveal the work that needs to be done to create truly inclusive content, campaigns and advertising. Using these opportunities as a guide, Citizen Relations identified how we can continue to ensure our approach is inclusive with the aspiration of eliminating bias completely. These actions represent the next step in our continuous commitment to create content and experiences that are inclusive, and making every conversation count.

Setting the Standard

We want to lead by example, however the change we need will not come from one agency alone – there is a need from brands and agencies everywhere to work together if we are going to move forward with better representation across all aspects of our industry. To do that, we need better data and we must look beyond industry benchmarks to census data to ensure our organizations reflect the communities we live and work in. As an agency we commit to setting representation targets that incorporate industry and census diversity data with the view to set targets solely on census data.

Championing Equity

Utilizing the data we have collected through focus groups with influencers we will create a guide to support other agencies and brands in strengthening their relationship with influencers from ethnically diverse communities.

Across the agency we will align on standard pay principles and a code of conduct with influencers. The industry is working to establish benchmarks and indices for influencer pay equity. Citizen Relations will actively participate in and join conversations with like minded agencies to share learnings and data when possible. In the meantime, Citizen will commit to creating its own benchmark and index and ensure it is utilized across the agency. Currently we use cost/impression; cost/engagement, and we will identify other variables to include and assess annually, incorporating new findings as they come.

Doing What's Right

Doing what's right requires that we connect our decisions on what we can and cannot do as an agency to the values that drive our business. Advancing conversations and action on increasing representation of ethnically diverse and systemically excluded individuals takes a collective effort and sharing learnings of what worked and what doesn't work. We commit to sharing what we are doing and how we are tracking on reaching our goals publicly in hopes that you will too.

Survey Methodology

This study was conducted using a quantitative survey methodology, which included a combination of close-ended questions supplemented with a few open-ended questions, where applicable. The survey was approximately 10–12 min. in length and was administered to an online panel of 2,242 respondents across Canada and the United States. To reach the audience most likely to be relevant to influencer marketing, the sample plan for this study was designed to target respondents who were between the ages of 18–39 years old and who spend at least two hours a week on either Twitter, Instagram, or TikTok.

Quotas were also applied on ethnicity/ cultural identity to ensure a diverse and adequate sampling of the target audience. The sample plan included a quota of 50% of respondents from Canada and 50% from the U.S. For the Canadian sample, six key segments were identified for sampling according to national demographic data from Statistics Canada and per the study's objective of surveying ethnically diverse Canadians in particular. Quotas were applied to ensure that the Canadian sample would be split as evenly as possible among these segments on a best efforts basis. These segments included the following of ethnicities and/or cultural identity groups: White, Black (Canadian), Indigenous or First Nation, South Asian, East Asian, and other People of Colour (POC), which include Arab, Latin America or Latinx, Southeast Asian, mixed race or other(s).

Similarly, for the U.S. sample, six key segments were identified for sampling according to national demographic data from the Census Bureau and per the study's objectives of surveying BIPOC Americans in particular. The U.S. sample would be split as evenly as possible among these segments on a best efforts basis. These segments included the following ethnicities and/or cultural identity groups: White, Black (American), Native American and/or Indigenous, or Pacific Islander, Latin American or Latino/ Hispanic, Asian (South Asian, East Asian, Southeast Asian), and other People of Colour (POC), which include Arab, mixed race or other(s).

Data collection was conducted by a reputed and trusted sample partner from May 4th – 30th, 2022 in three key languages: English, French, and Spanish. Best efforts were made to meet each quota, where possible. The final sample included the following number of respondents for each segment:



Canadian segments: 1,102 respondents

- White: 200 respondents
- Black (Canadian): 200 respondents
- Indigenous or First Nation: 103 respondents
- South Asian: 200 respondents
- East Asian: 199 respondents
- Other POC (Arab, Latinx, Southeast Asian, Mixed Race, Other): 200 respondents

U.S. segments: 1,140 respondents

- White: 201 respondents
- Black (American): 201 respondents
- Native American and/or Indigenous, or Pacific Islander: 115 respondents
- Latinx: 304 respondents
- Asian (South Asian, East Asian, Southeast Asian): 212 respondents
- Other POC (Arab, Mixed Race, Other): 107 respondents



ABOUT CITIZEN

Citizen is a global communications agency built by and for the Modern Citizen. We wake up each morning inspired to make every conversation count, partnering with clients to grow their brands and positively impact culture. Across offices and disciplines, this is our single-minded mission.

We believe our name comes with a responsibility - to our fellow Citizens inside our walls and around the globe. We live by the values of the Modern Citizen; We champion equity. We set the standard. We do what's right. We believe that conversation leads to action, and action leads to impact.

To learn more about us, visit www.citizenrelations.com