



THE FALL OF THE INFLUENCER



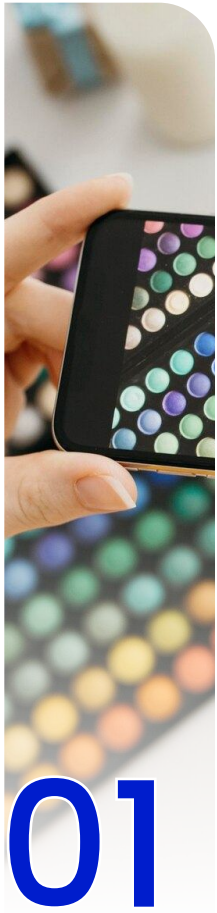
AND THE RISE OF THE EVERYDAY CREATOR

THE AUTHENTICITY
REVOLUTION

HOW EVERYDAY CREATORS
ARE SHAPING THE FUTURE
OF INFLUENCE



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THE CHANGING LANDSCAPE OF INFLUENCE

It's no secret that influencer marketing has undergone a remarkable transformation in the last several years, evolving from meticulously curated blog and Instagram content to the rise of everyday creators who distance themselves from the traditional "influencer" label. Tactics that have historically been table stakes in the semi-tumultuous world of influencer partnerships have proven unsuccessful or inconsistent at best.

[Axios' reports](#) indicate that while consumer interest in traditional influencer content has declined, their engagement with social media in purchase behaviors has not.

As brands grapple with the challenges of engaging audiences in this rapidly evolving environment, many marketers find themselves perplexed by the diminishing returns of their once-reliable influencer strategies.



**16%
DECREASE**

in interest in influencers' attire since 2020.



**42%
INCREASE**

in the number of American consumers that research products on social media.

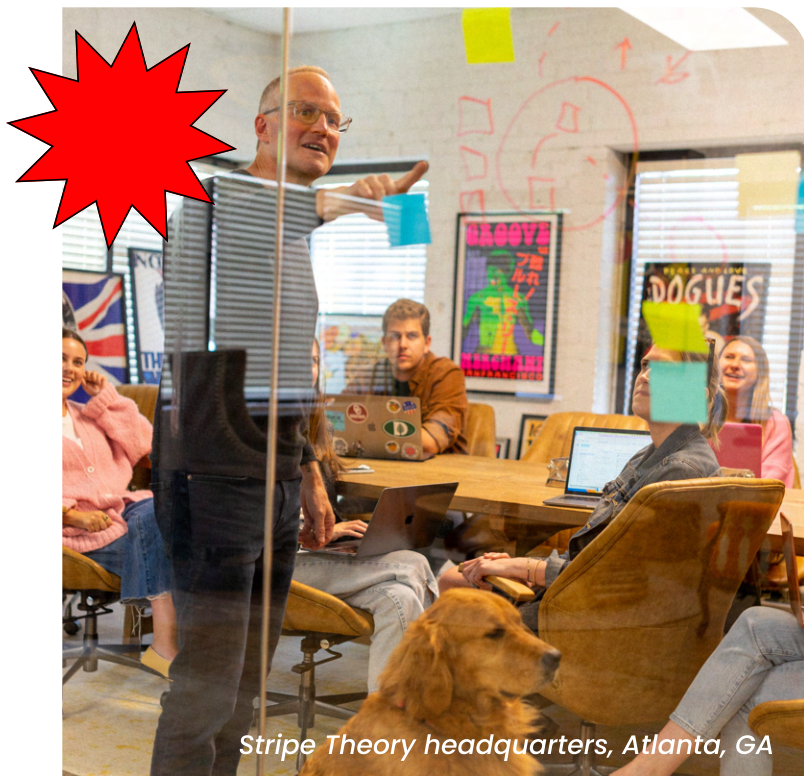




AT STRIPE THEORY,

we conducted a survey and research to explore the efficacy of influencer marketing and understand consumer preferences across generations. Our findings highlight a shift towards authentic partnerships over traditional influencer advertisements and reveal what makes an influencer successful today.

By examining this evolution from feed curators to authenticity-driven content creators, we can provide brands with insights to effectively leverage influencers in their marketing strategies.



Stripe Theory headquarters, Atlanta, GA

SURVEY METHODOLOGY

Conducted in early 2024, our survey included 1,010 U.S.-based participants of various age groups who have made a purchase from influencers. We aimed to understand consumer purchasing behaviors related to influencers, collecting data on engagement, trust, authenticity, live streaming preferences, and platform familiarity to provide a comprehensive view of the influencer marketing landscape.

THE SURVEY POOL

68% female

35% aged 25-34

62% married

60% are employed full-time

68% White

20% Hispanic

6% African American

4% Asian

INFLUENCER IMPACT

ON PURCHASING BEHAVIORS

When deciding whether to make a purchase based on an influencer's recommendation, the following rank highest among all respondents:

#1 Product Quality

#2 Price

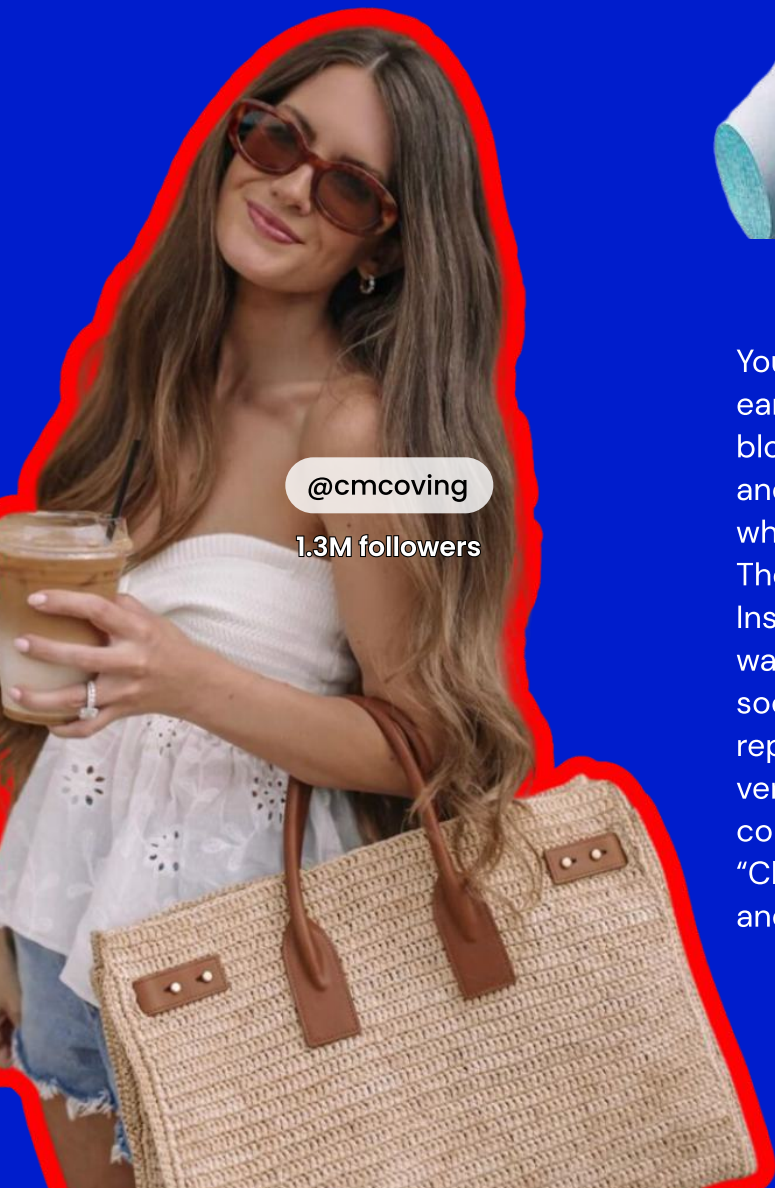
#3 Authenticity

UNDER 18	AGES 18-24	AGES 25-49	AGES 50-64	AGES 65+
WHAT ARE THEIR TOP PRIORITIES WHEN DECIDING ON INFLUENCER-RECOMMENDED PURCHASES?				
Exclusive Discounts Product Giveaways Interactive Q&A* Behind The Scenes Content	Transparency & Authenticity Exclusive Discounts Product Giveaways TikTok Shop Recommendations Behind The Scenes Content	Expertise Research & Reviews* TikTok Shop Recommendations Trending or Popular Products*	Authenticity* Expert Opinion* Transparency and Authenticity	Transparency & Authenticity Expertise*
WHAT DO THEY PURCHASE FROM INFLUENCERS?				
<p>Food & Beverage</p> <p>Beauty Products</p>	<p>Fashion & Apparel</p>	<p>Fashion & Apparel</p>	<p>Food & Beverage</p> <p>Health & Wellness Supplements</p>	<p>Beauty Products</p>
WHAT ARE THE BIGGEST FACTORS THAT MAKE AN INFLUENCER SEEM INAUTHENTIC?				
<p>Top contributing factors among all respondents:</p> <ul style="list-style-type: none"> • Lack of transparency about sponsorships • Promoting products they don't actually use • Faking personal experiences (or emotions) 				

THE GENESIS OF INFLUENCERS:

A MARKET OF A DIFFERENT STRIPE

The word *influencer* wasn't added to the [dictionary](#) until 2019, but by then, we had already been inundated for years by influencer endorsements across consumer categories.



@cmcoving

1.3M followers

Influencer /'inflʊəns
n. 1 a person with the ability to influence potential buyers of a product or service promoting or recommending the items on social media.
A person or thing that influences another



You may remember the early days of the mommy bloggers, like [Sarah KJP](#) and [Caitlin Covington](#), who turned into icons. Their carefully crafted Instagram feeds paved the way for a new breed of social media stars and represented fully evolved versions of contemporaries like the “Christian Autumn Girls” and Sorority Socialites.

You may also remember accounts like [The Blonde Abroad](#) and [Lorna Luxe](#), living travel-filled and Gucci-adorned luxury lifestyles that were somewhat unrealistic for the vast majority of the public.

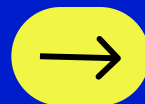
At the time, influencer-sponsored content felt so simple. Brands from Dolce & Gabbana to Target were highly successful in using influencer endorsements to push their products. Through stylized imagery, they capitalized on consumer envy, and the concept of attainability didn't yet matter. While these influencers gained popularity, another sphere of influencer marketing had been gaining speed.

YouTube's rise in the mid-2000s provided a perfect breeding ground for videos. YouTubers such as Zoe Sugg were one of the first to build a true community within her following and then use it to start her own business—one that is still successful today.

In 2012, she posted a video discussing how she handles panic attacks and anxiety. This was one of the first times an influencer used their large platform to talk about mental health and normalize the struggle, with other creators quickly following her lead and brands taking notice. She began frequently using sponsored products in her videos, and she would write in the description box of her video the discount code the brand created for her followers.

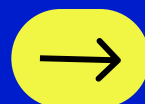


\$5 BILLION



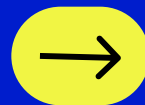
INVESTED IN THE CREATOR SPACE IN 2023

\$104 BILLION

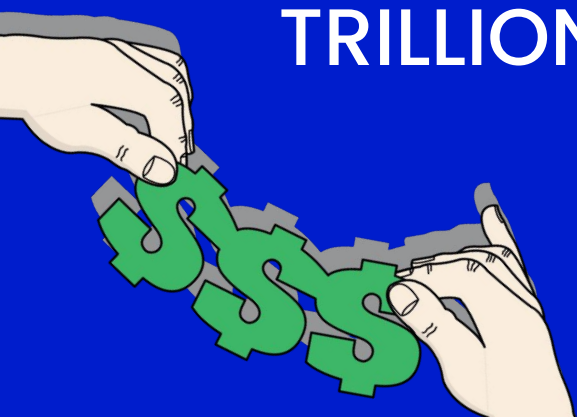


EVALUATION OF THE CREATOR ECONOMY

TRILLIONS



IN PROJECTED VALUATIONS



THE EVOLUTION OF INFLUENCER MARKETING

Mid-2000s



The Beginning of Video

YouTube's growth fosters a platform for creators like Smosh, Jenna Marbles, and Fred Figglehorn to attract audiences with comedic content. The platform extends video length limits for deeper content, while the release of the iPhone boosts mobile video viewing.

Early 2010s



Early Influencers

Influencer marketing on YouTube gains traction as a key strategy, while Chiara Ferragni, Aimee Song, and Sincerely Jules pioneer fashion on Instagram. Photographers also build significant followings for their artistic work.

2000



Late 2000s

Introduction of Monetization

YouTube's partner program launches, enabling ad revenue for creators. Nike partners with Barefoot Blonde in a landmark deal. Influencers like Michelle Phan, VSauce, and Game Grumps drive makeup, educational, and gaming content while pioneering brand partnerships.

Still the Early 2010s

The New Live Laugh Love Curators

The evolution of "Mommy Bloggers" and meticulously styled family portraits and home decor content reflects a focus on aspirational lifestyle, bolstered by Instagram's algorithm favoring aesthetically pleasing content.



Late 2010s



The Fall of Inauthenticity

The influencer landscape diversifies into micro-influencers and niche content as consumers demand authenticity, highlighted by the Fyre Festival debacle. The rise of short-form video and socially-conscious influencers coincides with a shift toward user-generated content amid growing ad blocker use.

Mid 2010s



Rise of Diverse Niches

TikTok launches as influencers expand into niches like beauty, fitness, travel, gaming, and lifestyle. Instagram enhances engagement by introducing video content with Instagram Video and IGTV, and using captions and Stories for storytelling.

Early 2020s

An Emphasis on Authenticity

Social media exposes fake followers and prompts accountability, favoring authentic content over curated posts. Influencer detox marketing highlights burnout, while mommy bloggers and luxury lifestyle influencers face backlash for staging perfection and undisclosed sponsorships.

2024



A NEW SOCIAL CELEBRITY

Then between 2012 and 2020 these realms of influencer marketing—polished and stylized curators versus authentic, every-day personalities—crashed into each other. The period saw Instagram introduce Reels, the rise and fall of Vine, and the emergence of TikTok. As video could be created for multiple platforms, and syndicated across channels to find the right audience, content creation and consumption ramped up, video became the top-performing medium, and we saw the birth of a new kind of celebrity.

YouTube vloggers and TikTok celebrities like David Dobrik, Ace Family, The Pauls (Jake and Logan), and The D'Amelio's (Charli and Dixie) quickly reached unprecedented heights due to their dynamic on-screen personalities, which set them apart from their predecessors.



@charlidamelio

44.3M followers

@dixiedamelio

21.1M followers



@daviddobrik

10.2M followers

THE CHANGING LANDSCAPE OF INFLUENCE

**56%
OF BRANDS**

prefer TikTok to collaborate with influencers⁴

**37%
OF USERS**

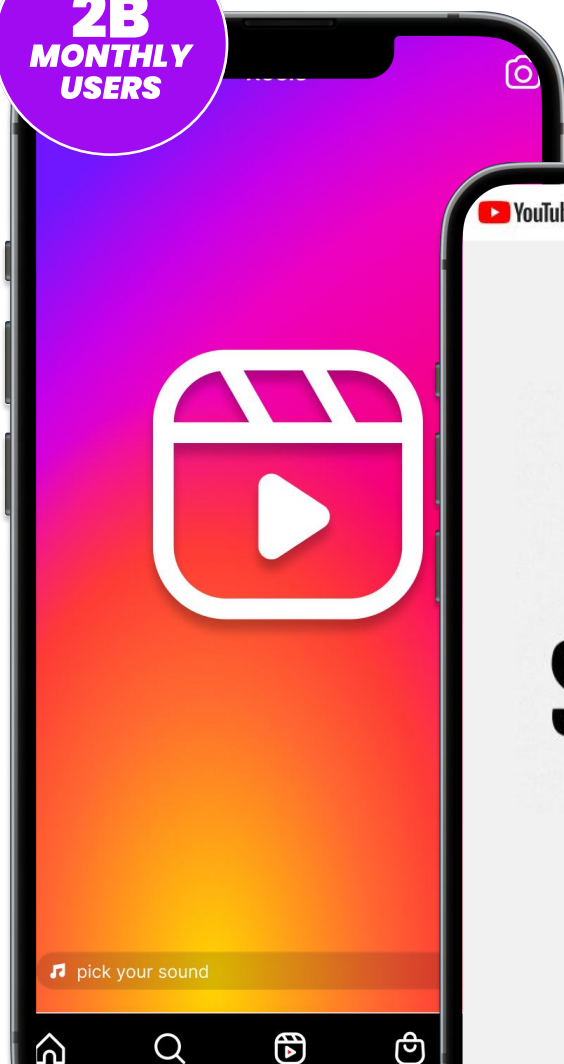
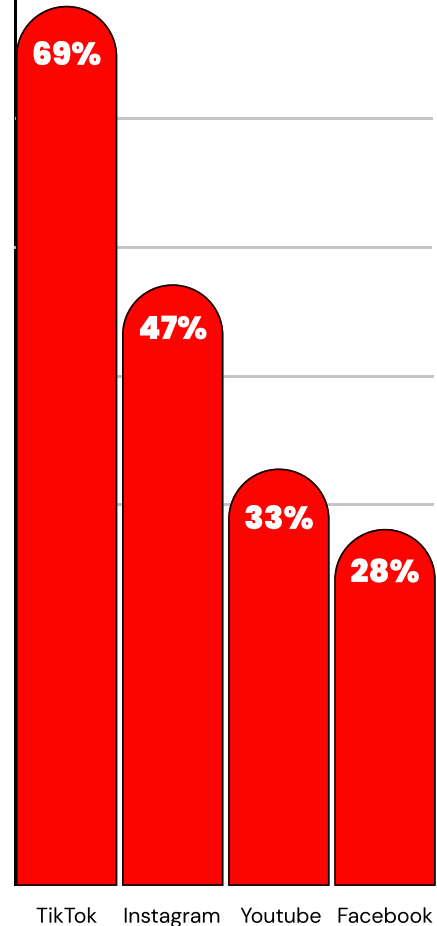
on Instagram regularly interact with influencers²

**2B
MONTHLY
USERS**

**2.5B
MONTHLY
USERS**

**1.2B
MONTHLY
USERS³**

Brands using influencer marketing by channel¹



THE PEAK AND PIT OF TRADITIONAL INFLUENCERS

In 2022, Forbes explained that the always-poised-for-growth influencer market took off largely thanks to the pandemic, when consumers had nowhere to shop except online and watching people on TikTok became a national sport. Brands from categories like beauty, healthcare, food, and beverage flooded our feeds, all hoping to get a piece of the influencer pie. However, COVID is also when we hit the point of diminishing returns for traditional influencing.

Consumers began to grow weary of the increasingly disingenuous nature of traditional influencer promotions. Hence where we find ourselves today, at a critical juncture in the market. This has sparked controversy and unfavorable perceptions due to (and this is by no means an exhaustive list):

OVERSATURATION & FATIGUE

“More than 50 million people around the world now consider themselves to be influencers (or creators),” Forbes reported in 2022. Consumers became oversaturated with influencer promotions, leading to a sense of fatigue.

This is exemplified by the rise of movements like #sponcon, which mocks overly sponsored content, and the popularization of blocking sponsored hashtags so they didn't appear on a user's feed.



INFLUENCERS CAUGHT WITH FAKE ENGAGEMENT

Several influencers have been exposed for buying followers or inflating engagement metrics. Even celebrities, like Kylie Jenner, have been previously outed for this disingenuous tactic, highlighting the issue of inauthenticity and led to stricter platform policies.



LUX INFLUENCERS & REALITY DISCONNECT

Many luxury influencers faced criticism for promoting an unrealistic and unattainable lifestyle. For instance, The **Financial Diet** even decried influencer habits, showcasing the disconnect some influencers have with their audience's financial realities. This stoked a loss of trust, as consumers felt that many influencers were simply out of touch.

RISE OF *CALL-OUT* CULTURE

Influencers have been accused of inauthenticity or for promoting unrealistic beauty standards, and those who get caught “being fake” face public backlash. **Mikayla Nogueira** experienced this in her L'Oréal mascara collab, where she received a lot of hate after posting a video reviewing their new mascara, and was called out for wearing fake eyelashes in the video. Although her follower growth continued not long after this incident, she still receives mixed sentiment as people feel they can't trust her content.



WHAT THIS MEANS

With this influencer epidemic of sorts, we've seen an over saturation of so-called influencers that don't actually have influence over real people, or even worse, are capable of damaging a brand's public perception.

YET, INFLUENCERS STILL MATTER...

While we see a steep decline in traditional influencers, creators still hold more influence than ever. According to our study, influencer recommendations are especially important for those aged 18-49, with vast projections for the market's continued growth. Influencer Marketing Hub estimates the total creator economy market size to be around \$104 billion, with a substantial growth trajectory on par with the gig economy—noting this projects a future valuation in the trillions of dollars.

23%
MORE LIKELY

to make impulsive purchases

27%
LESS LIKELY

to spend time finding the right deals

73%
look to creators when making purchase decisions ¹

87%

will buy from brands that partner with influencers outside of just social content ²

That valuation takes heavily into consideration Gen Z, who are “23% more likely to make impulsive purchases and 27% less likely to spend time finding the right deals” thanks to their involvement in social media from a young age, according to Axios.



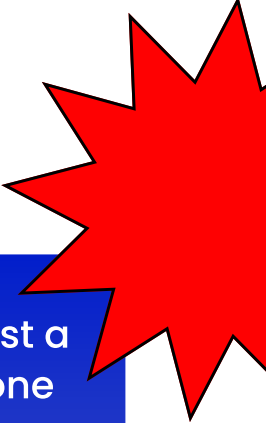
THE RISE OF EVERYDAY CREATORS:

AUTHENTICITY OF EVERY STRIPE

So, where is success found in influencer marketing? And what sets apart traditional influencers from the burgeoning breed of casual creators? The answer is simple: authenticity.

Our survey respondents shed light on the key factors shaping perceptions of influencers' authenticity. These include faking personal experiences or emotions for likes, promoting products or services they don't actually use or believe in, and a lack of transparency about sponsorships or paid partnerships. It's clear consumers crave genuine connections and are quick to discern inauthenticity, with transparency and honesty being non-negotiable in building trust with audiences.

So, what implications does this hold for brands seeking to leverage influencers in today's market? For a brand hoping to use influencers to promote their product or services, traditional collaborations simply won't cut it. Let's explore the influencers and brands that have embraced this ethos.

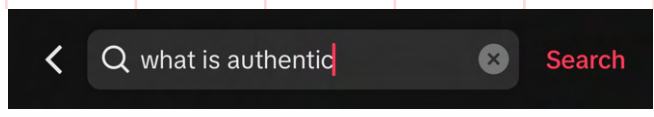
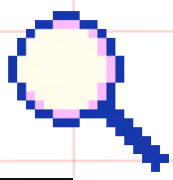


Authenticity is more than just a buzzword—it's the cornerstone of effective influencer marketing, the very currency of influence itself.



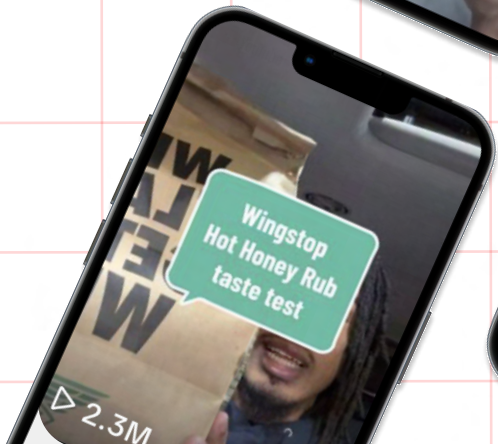
@alix_earle

3.6M followers



We've seen brand success with influencers who have truly mastered the art of authenticity and relatability.

The greatest and arguably most well-known example is **Keith Lee**, a sensation with over 16 million followers on TikTok, who gained popularity by doing humble food reviews in his car. While he is beloved for boosting small, family-owned businesses, his brand collaborations, like this one with Chipotle, integrate perfectly into his existing content, remaining true to his authentic self. The result? An advertisement so seamlessly woven into his narrative that it's nearly indistinguishable from organic content.



On the other end of the spectrum, we have **Sofia Richie**, whose life of opulence contrasts starkly with her relatable content style and girl-next-door persona. She engages in candid conversations with her audience, tackling everyday issues and joking around with other beloved creators, like her friend Jake Shane. Her unattainable wealth should land her in the out-of-touch luxury influencer category we mentioned earlier, however, her casual content creation style makes even her life seem relatable. And, while it's true that most of the products she showcases are pricey, Stripe's survey of livestream purchasers showed that a broad swath of shoppers, ages 25 to 49, are less price-sensitive than previously thought.

Then there's **Mada Graviet**, who, from her slightly asymmetrical eyebrows to her low-tech food filming at a friend's dinner, would seem not to be the partnership darling of any major mover. Graviet makes the most of her deceptively not-influential personality—effortlessly persuading followers to indulge in Unreal's line of snacks; her love of the brand's chocolate pretzels drove her to munch through an entire bag every day for three days straight. Her partnership with **Jolie** is another great illustration, where she effortlessly discusses the everyday impact that the shower head has had on her life, prompting comments from followers who didn't even realize it was an advertisement.

And, finally, **Jenna Palek** makes no secret of her relationship with TikTok Shop, a newer integration that has gained traction for social selling. In fact, 71% of our survey respondents are already familiar with it, despite it having been launched in Fall 2023. Palek often guides her audience towards purchasing products, even with her earning commissions from these transactions. Remarkably, her followers continue to trust her recommendations, a testament to the rapport she's built through transparency and openness.



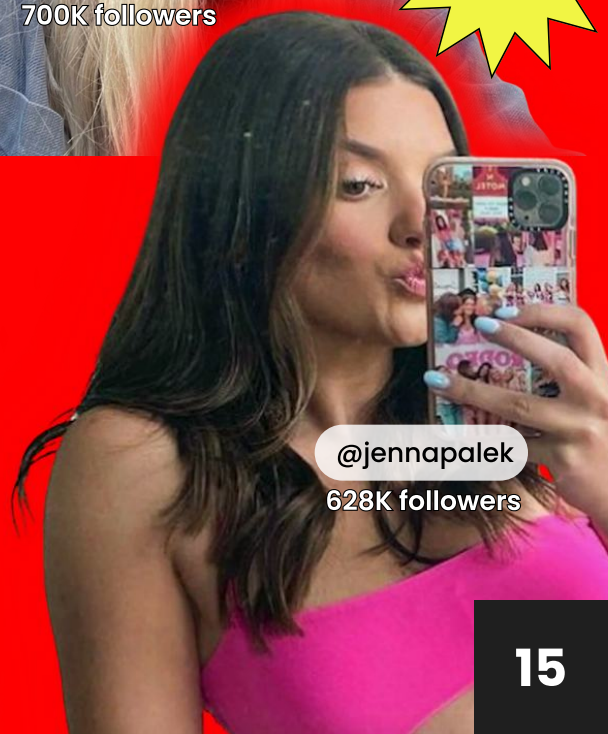
@sofiagrainge

3.7M followers



@madagraviet

700K followers



@jennapalek

628K followers

STAYING RELEVANT

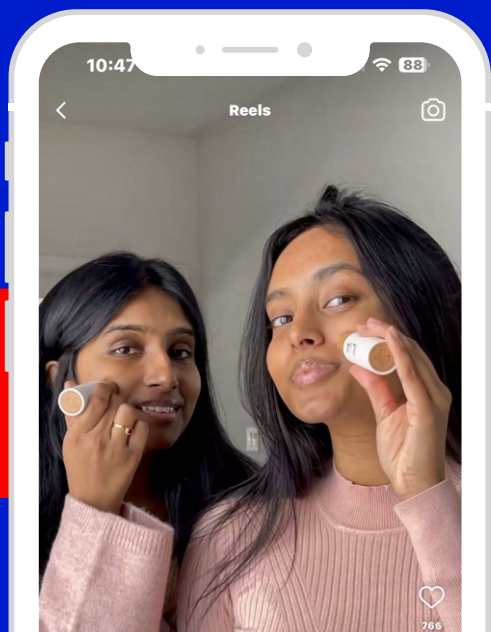
TRENDS AND EXPERTISE

Understanding the pivotal role of authenticity, the question arises: **how do we translate these insights into actionable strategies?**

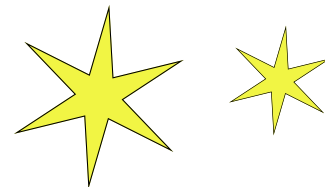
Influencer marketing operates at the nexus of trends and expertise, demanding proactive adaptation for sustained success. Here's how brands can navigate this dynamic terrain:

LEVERAGING EXPERTISE:

Authenticity can sometimes mean being direct, but being direct demands that your influencers be informed and trusted. That's when it helps to grab an expert. It just so happens that we're also in a golden era for highly engaging, short-form educational content.



These influencers entertain people of all ages, but our research shows their expertise is most valued by those 65 and older, who also happen to be the biggest buyers of beauty products endorsed by influencers. Meanwhile, the 50-64 age group is the top purchaser of health and wellness supplements featured on influencer timelines, catering to the interests of both demographics.



FROM SKINCARE TO SPACE

Lindsey Zubritsky, MD, a certified dermatologist leveraging TikTok to enlighten audiences on diverse skin issues and dispel beauty misconceptions, has recently joined forces with CeraVe. This partnership effectively bridges the gap between professional dermatological advice and accessible, everyday skincare solutions.

Likewise, KiwiCo, a brand that makes activity boxes for kids, has collaborated with **Mark Rober**. Rober, a former NASA engineer renowned for elucidating intricate scientific concepts through creative science experiments on his engaging and visually captivating YouTube channel, is at the helm of this partnership, showing off their products while building fully realized versions to help inspire parents of the children KiwiCo is targeting to get them started at a young age.

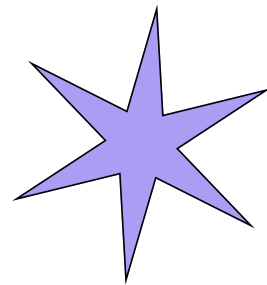


@MarkRober

@dermguru



BEYOND AWARENESS



Consumer preferences have shifted toward quality over quantity, signaling a departure from traditional sponsorship models. The "Anti-Walmart Effect" underscores this sentiment, with audiences favoring authenticity and selectivity over mass-market endorsements.

This shift presents an opportunity for brands to collaborate with influencers who embody expertise and authenticity, rather than simply seeking broad exposure. A campaign works for a product launch or in service of a promotion, but a long-term partnership is going to be the more consistent driver of down-funnel activity.

FOCUS ON FIT:

It is always, and we do mean always, obvious when an influencer doesn't or wouldn't use the product or services they're showcasing. If you're selling a car, the influencer should drive that car. If you're selling snacks, it helps to partner with someone who reviews Lil' Debbies for fun (we're looking at you, Matt Mitchell). Category should always be your first consideration. You can approach a target demographic from multiple angles, but the most effective one will more often than not be a long-term partnership as a natural extension of their channel, rather than shoehorning a "popular" influencer into a quick campaign just for their projected reach. The algorithm is working against you, and the content will never reach their full following.

For most products, you need time to build up trust, and you need repeated exposure to really make people think about it. A great example of this is **AG1** (Athletic Greens). As the third-largest podcast advertiser, they heavily invest in long-form campaigns, and their partners' audiences are strongly aligned with their own. This ensures they are primed for the exclusive discounts offered, which is a huge driver in influencer purchasing, according to our insights survey.



OVERCOMING OVERKILL, RETHINKING PR PACKAGES:

To combat influencer fatigue, brands must rethink their approach to PR packages. Instead of bombarding audiences with promotional content, brands should focus on entertaining and educating their audience.

Brands seem to quickly hop on the newest trending influencer they can find without fully considering if their product will be of use to them. Darcy McQueen filmed the accumulation of her PR packages, and people were blown away at brands sending that much free product, leading to hotly debated conversations on brands and influencers' contribution to waste and overconsumption. Not only should you ensure you're sending product to the right recipients, but you must carefully consider your target audience's sensitivity to sustainability when building your sampling and/or gifting strategy.

Building long-term trust through **ongoing partnerships** and prioritizing **quality over quantity** are essential strategies for sustainable engagement.





LOOKING AHEAD

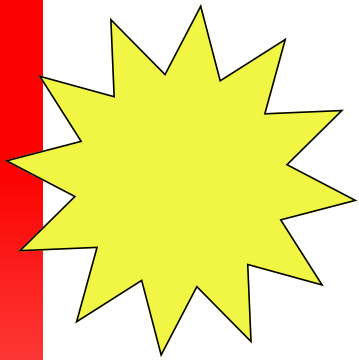
EARNING YOUR STRIPES

At the end of the day, influencers aren't going anywhere. We're wired to buy things that people we trust recommend to us. However, it's important to remember that popularity is cyclical, and adaptivity will always be the hallmark of any successful influencer marketing program. For now, the future of influencer marketing lies in embracing authenticity and fostering genuine connections with audiences.

By understanding the evolving landscape of influence, brands can navigate the shifting terrain and forge meaningful relationships with consumers. As influencer marketing continues to evolve, it's imperative for brands to prioritize authenticity and transparency. By aligning with everyday influencers and embracing genuine storytelling, businesses can thrive in the authenticity revolution.



Stripe



CRAFT A STRATEGY THAT RESONATES WITH YOUR AUDIENCE

We'll help guide you through the authenticity revolution and unlock the potential of influencer marketing. Follow us on social media for more insightful content and actionable ideas to elevate your marketing efforts.



 atl@stripetheory.com