VENAS

UNDERSTANDING CONSUMER PERCEPTION ON INFLUENCER MARKETING IN BEAUTY

A VENAS REPORT

NOVEMBER 2021

FOREWORD

When we started Venas Consulting almost two years ago, one of our missions is to contribute and help shape Indonesia's beauty industry.

Over the years we have seen so many untapped potentials due to a lack of access to good consumer insight. In Venas, we believe understanding the consumers is the first step in winning their hearts but getting the right kind of data, analyzing and turning them into actionable insight is a complex process that not all brands have the resources for. This is why we created #VenasReport, to help beauty brands get a better understanding of how their audience thinks and feels.

This year, we chose influencer marketing as a topic because it's still a category that's growing faster every year. It's projected that influencer marketing will grow to a $15 billion market by the end of 2022*.

Indonesia is no exception and influencer marketing is here is unique because we adapt the hybrid trend from the West as well as China. One trend that sticks out is the rise of social commerce. But how do we make sense of those trends and how do we use them to increase engagement in our brands? How do consumers really feel about influencer marketing and, most importantly, are they really influenced by it?

We hope this year's #VenasReport will give you those answers and more.

Warmest Regards,
Affi, Amalia, and Vanya
Venas Counsulting

**Collabstr Influencer Marketing Report 2022*

METHODOLOGY

PRIMARY RESEARCH

Online survey was conducted for 5 days, starting from October 5 to October 10 2021. The survey was distributed on Venas Consulting and Venas Team's social media accounts. Additionally, several social media influencers also distributed the online survey.

The survey observes diverse consumer perspectives surrounding influencer marketing, such as visual content sentiment, trust, purchase intention and favorite influencers along with their perceived traits. A total of 2,537 respondents was garnered. The respondents came from various sociodemographic (age, monthly income, occupation, etc.) profile.

SECONDARY RESEARCH

Venas Team also performed extensive desk research for the whole month of October 2021, in order to find, collect, and review relevant and accessible information about the topic. Some of the resources includes Venas prior research, research articles, publications and social media posts.

ANALYSIS METHODS

Several statistical analysis were performed in order to draw reliable conclusions from the data.

- Descriptive statistics are used to gain summary of the data pattern that came from the survey
- Cross-tabulation analysis is further used to examine the relationship between groups and variables
- Pearson correlation test is performed in order to verify the hypothesis about the relation between constructed trust variables with purchase intention. The Pearson correlation-coefficient (0 to 1) showed the relation between the variables; 0 indicates a non-existent relation, and 1 indicates a strong positive relation.
- ANOVA test is performed in order to compare the means among different age groups and favorite influencers based on the constructed attributes.

In addition to the analysis, Venas expert opinions are also used as a basis in constructing insight and recommendations.

PART 1: KALEIDOSCOPE 2021

Beauty Industry Indonesia

SOURCES

- Venas Consulting Kaleidoscope 2021 data was extracted from cekbpom.go.id on October 28th 2021 with selected filters of search keywords on the "Product Name" and by selected categories.
- Primary data included: Venas Consulting - Combined Survey 2021
- Secondary data included: Facial Care - Indonesia Report 2021 by Mintel Group

SKINCARE KALEIDOSCOPE

TOP 3 SKINCARE CATEGORIES IN 2021*

1. **Cleansers and Toners:** wipes, washes, sprays, makeup remover & scrubs.
2. **Skin Whiteners/ Lighteners:** creams, lotions, and foams specifically for lightening the skin.
3. **Anti Aging:** Serums, lotions, and creams with anti-ageing properties.

TOP 5 KEY PLAYERS BASED ON MARKET SHARE*

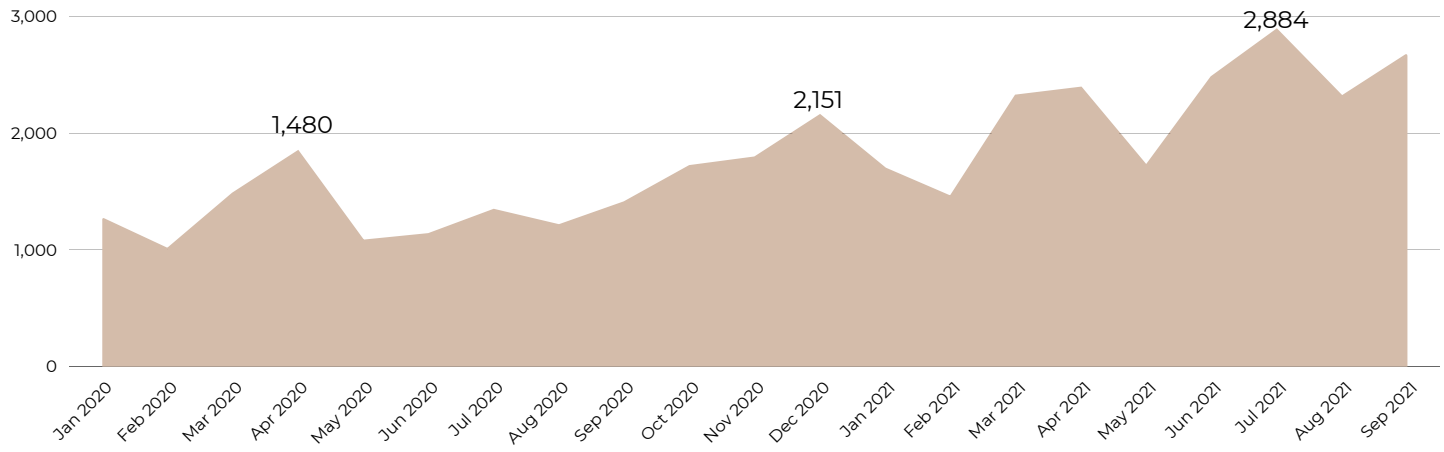
Unilever · PARAGON TECHNOLOGY AND INNOVATION · L'ORÉAL INDONESIA · J&J · Viva COSMETICS

**Source: Mintel. (2021). Facial Care – Indonesia 2021. https://store.mintel.com/report/facial-care-in-indonesia-2021-market-sizes*

SKINCARE LAUNCH

85% In 2021, there is an increase in skincare launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q3 2020 & Q1-Q3 2021.



NOTABLE INCREASE

Targeted Treatment	+131%	Eye Treatment	+50%
Lip Treatment	+120%	Core Treatment	+42%

MAKEUP KALEIDOSCOPE

TOP 3 MAKEUP CATEGORIES IN 2021*

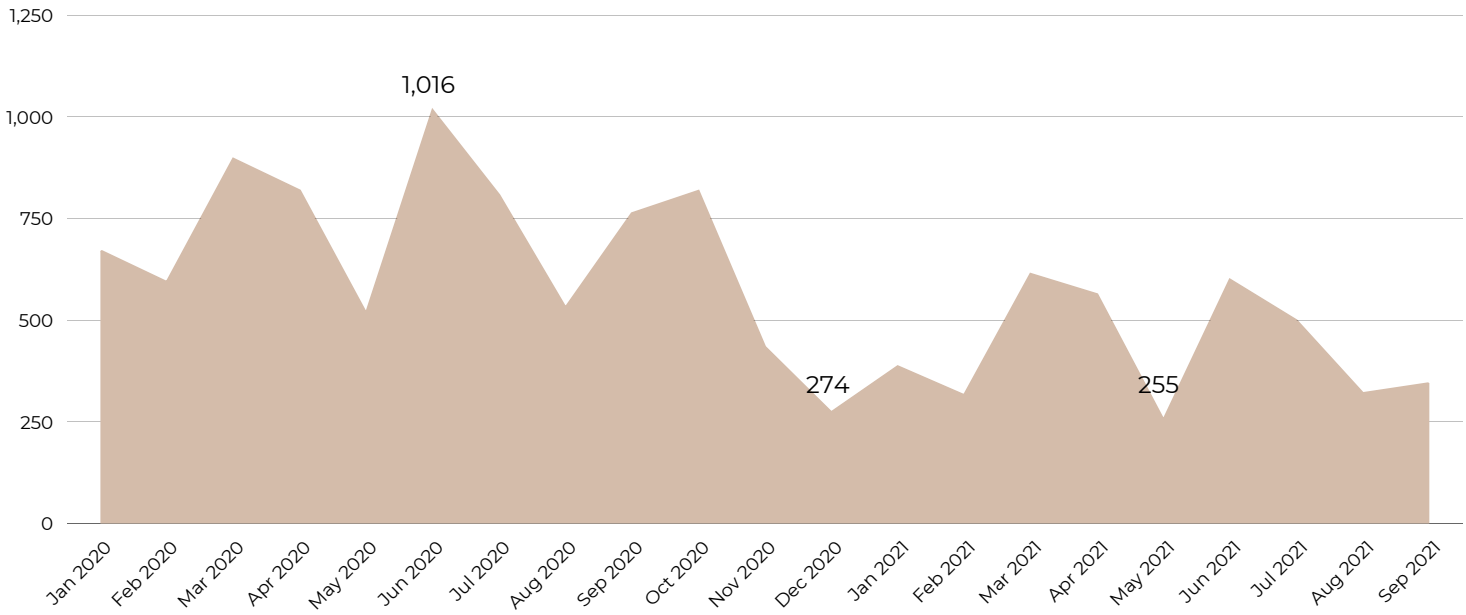
**Source: Venas Consulting - Combined Survey 2021*

1. **Powder:** Mineral powder, Pressed powder, Compact powder, Loose powder
2. **Blush**: Cream blush, powder blush, cheek stain, stick blush
3. **Lip Cream:** Matte lip cream, dewy lip cream, tinted lip cream.

MAKEUP LAUNCH

4% In 2021, there is a decrease in makeup launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q3 2020 & Q1-Q3 2021.



NOTABLE CHANGES

Color products	-44%
Complexion	+62%

PART 2: INFLUENCER MARKETING TREND IN 2021

INFLUENCER MARKETING IN BEAUTY - REPORT 2021

- Video content shows significant growth with the increasing popularity of TikTok and the introduction of Instagram reels and YouTube shorts to a wider audience.

- Along with this trend, we see more content creators coming up with higher quality production content while still maintaining their authenticity.

- Some companies utilize their employees as an informal "face" of the brand, creating content for their social media channels and getting popularity.

- Social selling trend increases during the pandemic where customers shop mostly online. More and more brands are utilizing influencers in their social selling initiatives.

- This year, we see the rise of micro-influencers and nano influencers driving the conversation on beauty and they are usually forming a tight-knit group.

- Influencers are leaning towards more specialized beauty content as a way of standing out from the crowd (e.g. luxury beauty, environmentally friendly, etc)

- Perfume reviewers are popping up on Instagram and YouTube driving higher interest in this growing category.

- Men and non-binary beauty influencers are on the rise proving further that the beauty category is becoming more and more inclusive.

- Many content creators on Instagram complained of a sharp decrease in views and engagement, resulting in them in placing Instagram ads on their content.

"Beauty influencers come in many different shapes & sizes."

PART 3: INFLUENCER MARKETING SURVEY 2021

FINDINGS AND INSIGHT

DISTRIBUTED BY:

- **Instagram**: affiassegaf, deszell, kinansreview, beautyandacne, lucedaleco, funskincare, dhaturembulan, hungryforskincare
- **Twitter**: lifnisanders, nitasellya, teppy, miund, fxmario, mpokgaga, amrazing, skinbrotha

DISCLAIMER

The survey findings may be affected by the distribution profile, majority of age group, income group, and location.

INFLUENCER MARKETING SURVEY 2021

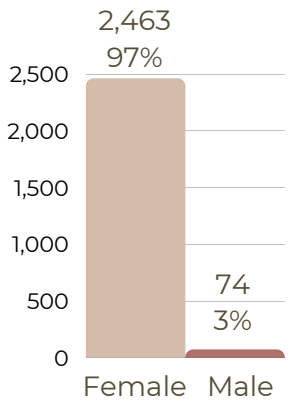
INFORMATION

5-10 OCTOBER 2021

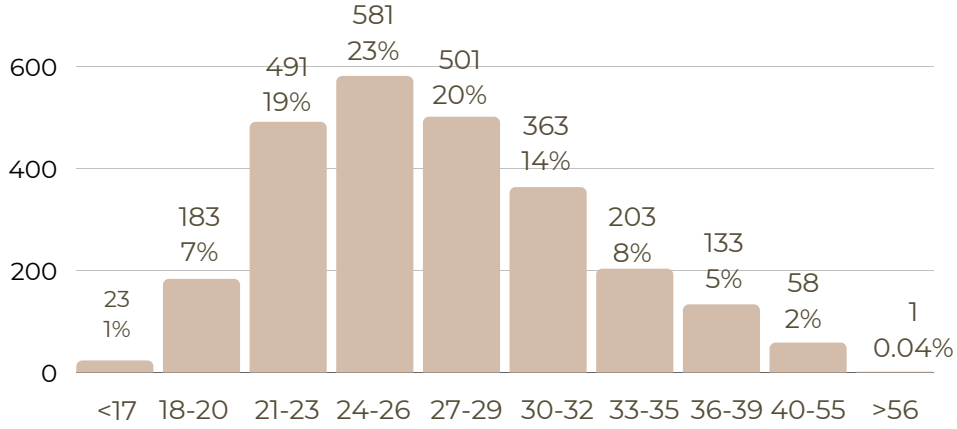
2,537 BEAUTY ENTHUSIASTS RESPONDED

SOCIODEMOGRAPHIC

GENDER



AGE GROUP

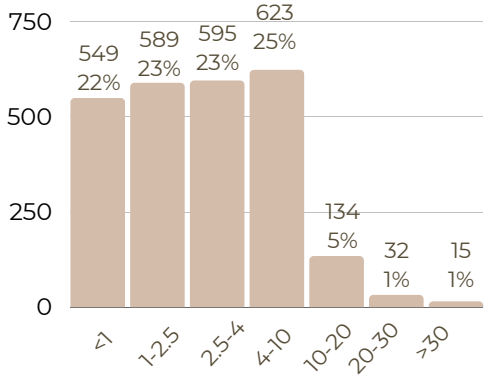


TOP 5 LOCATION

1. Jawa Tengah 16.1%
2. Jawa Barat 15.9%
3. Jawa Timur 15.3%
4. DKI Jakarta 12.7%
5. Bekasi 6.8%

AVERAGE MONTHLY INCOME

In million rupiah



TOP 5 EDUCATION

1.	High School	45.8%
2.	Bachelor's Degree	44.4%
3.	Junior High School	5.0%
4.	Master's Degree	3.9%
5.	Elementary School	0.8%

TOP 5 PROFESSION

1.	Housewife	38.9%
2.	Private Sector Employee	23.1%
3.	College Student	11.3%
4.	Entrepreneur	8.9%
5.	Freelancer	7.1%

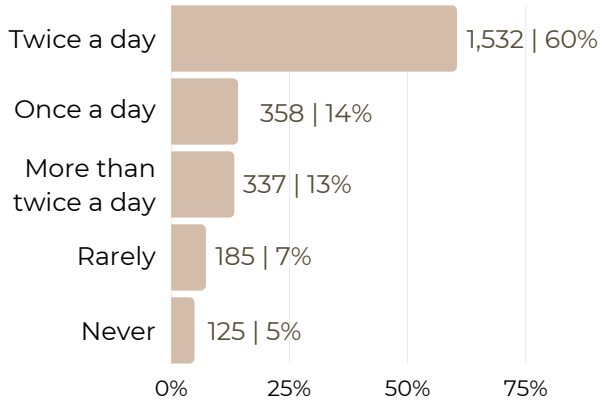
52%

30-32 Y.O. GROUP ARE HOUSEWIFE

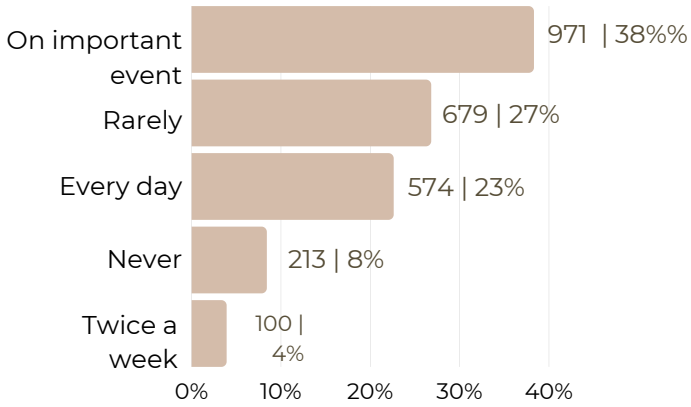
BEAUTY HABIT

In accordance with Venas survey* in the beginning of pandemic, skincare has become a habit and necessity. Those who wear makeup every day do so mostly due to their occupations requiring them to directly engage with customer or clients.

SKINCARE ROUTINE



MAKEUP ROUTINE



"26% of the respondents that do their skincare twice a day have an average monthly income in between 4 mio and 10 mio."

WEARING MAKEUP ON IMPORTANT EVENT

44%
HOME MAKER

18%
PRIVATE EMPLOYEE

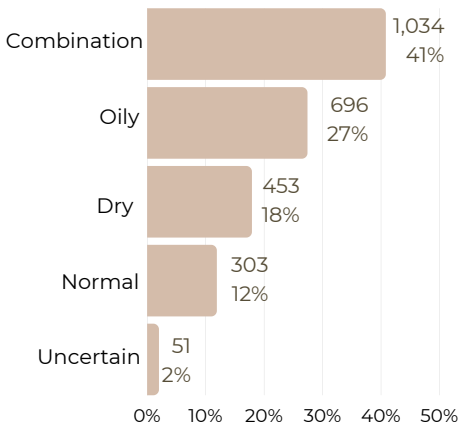
22%
UNIVERSITY STUDENT

**Source: Venas Survey, "Beauty Quarantine Survey", May 2020 | n: 2,544*

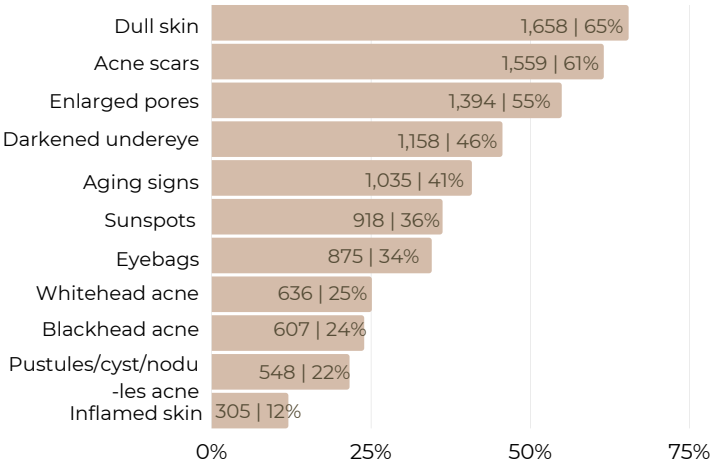
SKIN PROFILE

Top 2 concerns found in this survey are dull skin and acne scars. These findings are in line with Mintel's report that cited whitening/lightening category as second top categories in the market. Additionally, darkened under eye seems to be another notable skin concern. This is further supported by the fact that there is a 50% surge in eye treatment products launch in 2021

SKIN TYPE



SKIN CONCERN



SKIN CONCERN BASED ON SKIN TYPE

COMBINATION
n: 1,034

1. Acne Scars 66%
2. Dull Skin 63%
3. Enlarged Pores 58%

OILY
n: 696

1. Acne Scars 76%
2. Enlarged Pores 64%
3. Dull Skin 61%

DRY
n: 453

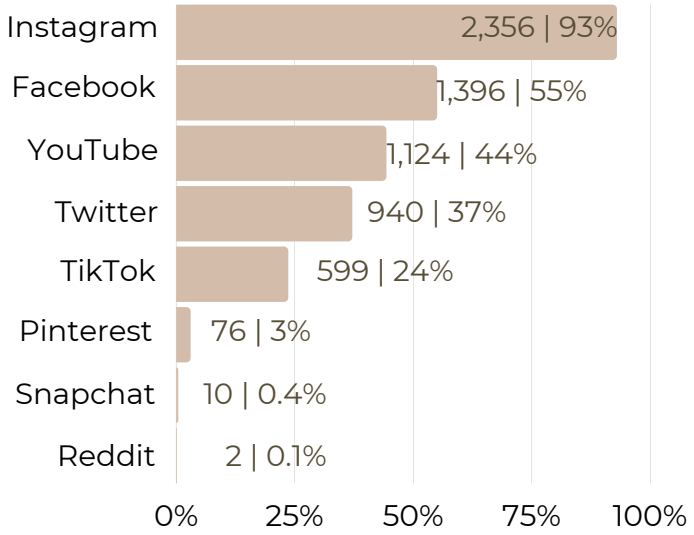
1. Dull Skin 73%
2. Aging Sign 56%
3. Darkened Undereye 49%

"THOSE WITH DRY SKIN ARE MORE CONCERNED WITH AGING SIGNS COMPARED WITH OTHER SKIN TYPES

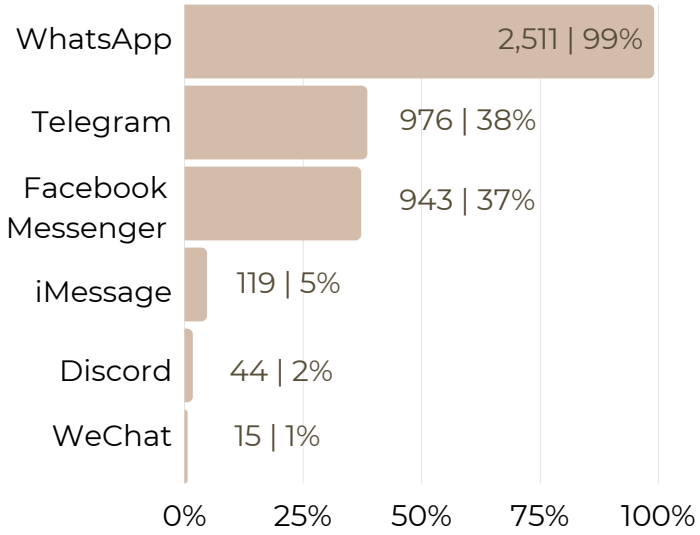
ACNE SCARS ARE THE NO 1 CONCERN FOR BOTH COMBINATION & OILY SKIN"

SOCIAL MEDIA HABIT

SOCIAL MEDIA



MESSENGER



BEAUTY E-COMMERCE

Shopee	tokopedia	sociolla	Lazada	BEAUTY STUDIO by Female Daily
2,360 (93%)	1,181 (47%)	828 (33%)	637 (25%)	203 (8%)

Other beauty e-commerce mentioned:
JD.id 99 (4%), Zalora 85 (3%), Beautyhaul 78 (3%), Orami 45 (2%), Bukalapak 40 (2%), Blibli 37 (1%) and Bhinneka 3 (0.1%).

TOPICS/INTEREST

1.Skincare	83%	6.Home & Family	36%	11.Career tips	21%	16.Sports	12%
2.Makeup	67%	7.Travel	33%	12.Technology	17%	17.Anime & Manga	10%
3.Food	63%	8.Entertainment & Gossips	27%	13.News	16%	18.Outdoors	8%
4.Fashion	62%	9.Business & Finance	24%	14.Fitness	14%	19.Politics	6%
5.Music	36%	10.Arts & Culture	21%	15.Science	14%	20.Gaming	5%

CONTENT SENTIMENT

BACKGROUND

We asked our survey respondents to assess their trust & interest in Likert scale from scale 1 (Strongly Disagree) - 4 (Strongly Agree) on these visuals. We used Instagram Story as a media using different combinations of interactive and elements that are available on instagram.

These elements are:

- Mention brand on the caption
- "Paid partnership" and tag brand
- Hashtag #ad #sponsored
- Link sticker
- Discount information and promo code.

CONSISTENT STORY ON ALL VISUAL

- Duration: "*Udah sebulan,,,*"
- Result/improvement: "*Kulitku kelihatan cerahan banget dan fine lines berkurang*"
- Proof of use: visual of serum dispensed from the pipette to the clean skin.

VISUAL AID

VISUAL 1

- Mention brand

VISUAL 2

- Paid partnership
- Mention brand

VISUAL 3

- Mention brand
- Hashtag #sponsored

VISUAL 4

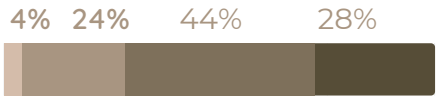
- Mention brand
- Link sticker
- Discount information and promo code

BEAUTY CONTENT SENTIMENT

Strongly Disagree | Disagree | Agree | Strongly Agree

VISUAL 1
MENTION BRAND

Do you trust this review?



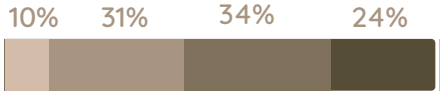
Are you interested in this review?

VISUAL 1

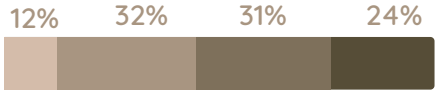
VISUAL 2

VISUAL 2
PAID PARTNERSHIP & TAG BRAND

Do you trust this review?

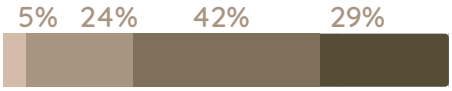


Are you interested in this review?



VISUAL 3
MENTION & HASHTAG AD

Do you trust this review?



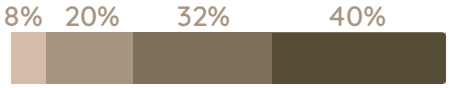
Are you interested in this review?

VISUAL 3

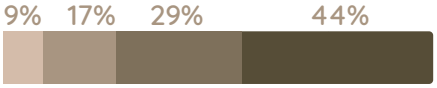
VISUAL 4

VISUAL 4
MENTION, LINK STICKER, DISCOUNT INFO & PROMO CODE

Do you trust this review?



Are you interested in this review?



KEY TAKEAWAYS

Based on the average of Likert scale on each key points, the respondents are leaning toward Visual 4 when deciding which content that spike their interest more, and the type of content that they trust more.

Meanwhile, the visual that garnered the lowest sentiment is Visual 2.

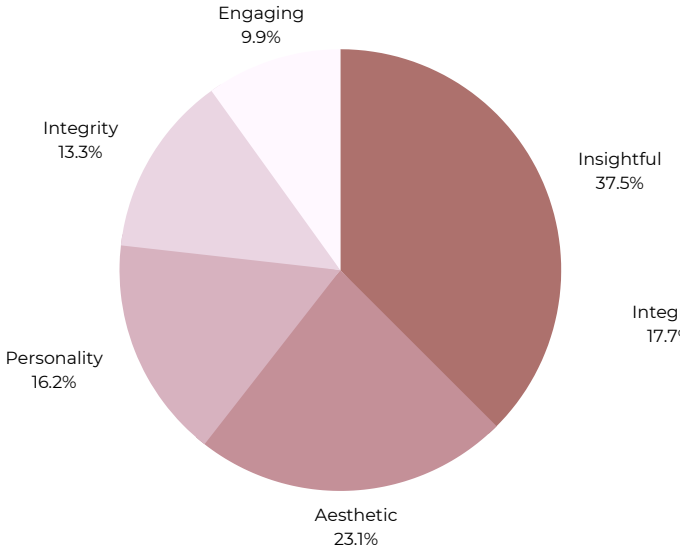
"PEOPLE PREFER INSIGHTFUL CONTENT OVER AESTHETIC ONES."

VENAS EXPERT OPINION

WHAT DRIVES INTEREST & TRUST IN INFLUENCERS CONTENT

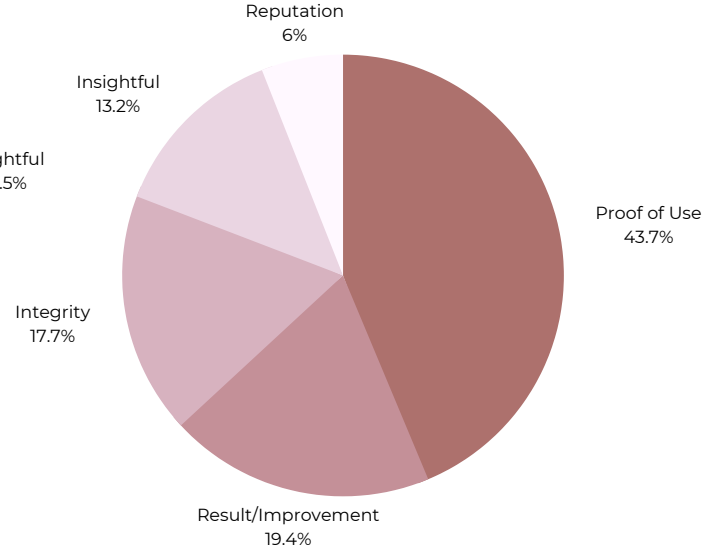
DETERMINING FACTORS OF INTEREST IN INFLUENCERS CONTENT

n: 1,655



DETERMINING FACTORS OF TRUST IN INFLUENCERS CONTENT

n: 1,855



INSIGHT

On further analysis, we asked our respondents to freely state the factors determining whether they perceive certain influencer's content to be interesting or trustworthy.

INTEREST

- Insightful
- Aesthetic
- Personality
- Integrity
- Engaging

TRUST

- Proof of Use
- Result/Improvement
- Integrity
- Insightful
- Reputation

"INFLUENCERS ARE PLAYING AN INTEGRAL PART IN CONSUMER JOURNEY IN BEAUTY."

CX JOURNEY IN BEAUTY PURCHASE

VENAS EXPERT OPINION

Customers undergo a set of stages when they are engaging with a certain brand, product and/or service, this set of stages is called the customer experience (CX) journey.

CX journey mapping focuses on the entire end-to-end journey starting from the discovery of a brand, product and/or service from the customer's perspective. Understanding CX journey is crucial for brands to create an effective marketing strategy and a favorable shopping experience. Moreover, CX journey mapping assists brands in achieving loyalty, telling what brands can do to give customers more reasons and incentives to make repeat purchases and even act as the brand's advocate.

Venas developed the CX journey in beauty purchase, along with the stakeholders and also where influencers take part in these touch points. Influencers are found to take part in several stages within the CX journey. More than just a gateway in Discovery stage, influencers can nudge customers' Consideration and Purchase stages through social selling, affiliate links and click-to-purchase actions.

Influencers can make or break the decision-making process. However, it should be noted that influencers are not the only stakeholder, just like that they are also unable to take part in every stage of CX journey. Therefore, brands should not rely solely on influencers, notably for customers' Loyalty and Advocacy stages.

Discovery*	Consideration*	Purchase*	Loyalty*	Advocacy**
Influencers	Review Platform	Brand Website	Membership	Referral Program
Advertisement	**Influencers**	E-commerce	Community	Community
Media Coverage	Brand-owned channel	Physical Store	Customer Relationship	Customer Recognition
		Influencers		

**Source: McKinsey & Company, "The Consumer Decision Journey", https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-consumer-decision-journey, June 1 2009*
***Source: Venas Consulting Expert Opinion*

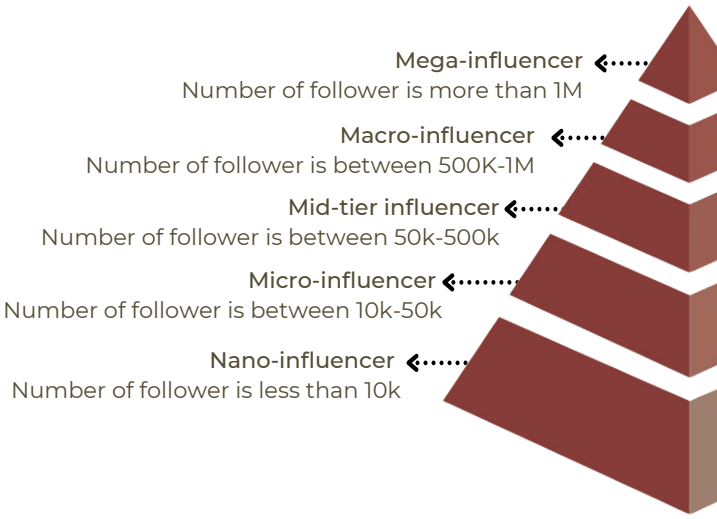
CATEGORIZING INFLUENCER

OLD PARADIGM:
Categorizing based on number of followers

How do you determine the right influencers for a specific touchpoints and goals?

Most commonly used method is by identifying and categorizing influencers based on their number of followers.*

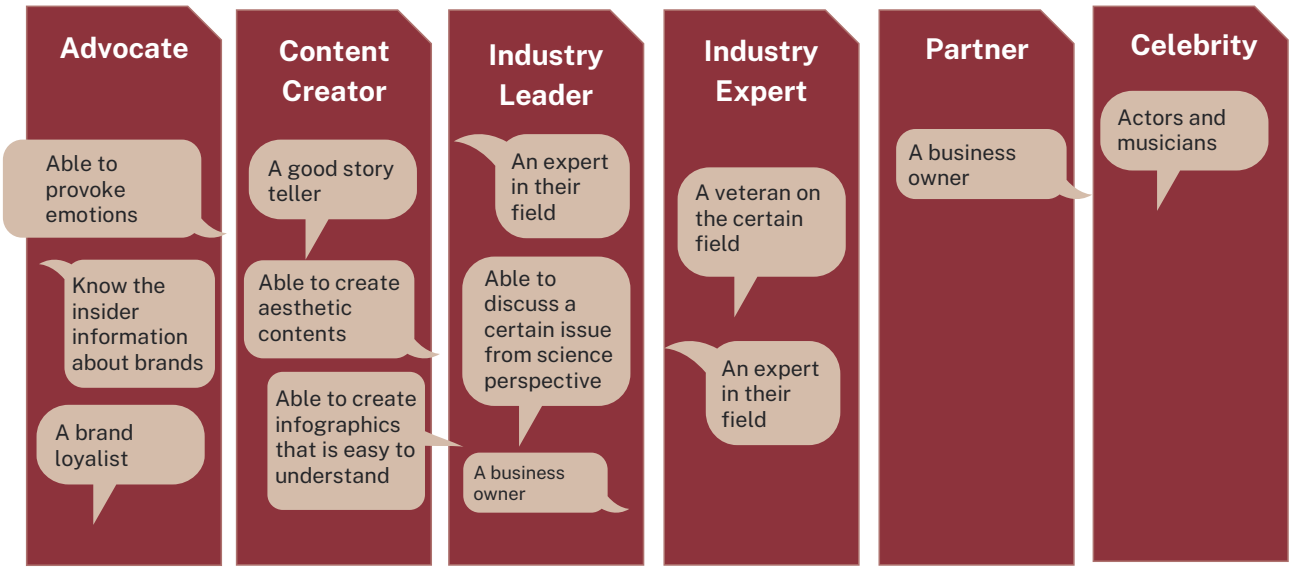
This is an old paradigm, because the number of followers is not enough and does not tell the whole story.



*Source: Mediakix, "Standard Terminology in Influencer Marketing", https://mediakix.com/influencer-marketing-resources/influencer-tiers/

THE NEW WAY:
Categorizing influencer based on specialty

As number of followers only is no longer sufficient for the current influencer marketing, Venas created a new way to categorize influencers based on their degree of specialty.



THE NEW WAY:

CATEGORIZING INFLUENCER BASED ON SPECIALTY

There are six categories (Advocate, Content Creator, Industry Leader, Industry Expert, Partner and Celebrity) with each respective characteristics. Each category represents unique traits which are easily identifiable by the followers and brands alike. These unique traits provides convenience for brands to identify influencers and determine the right influencers for specific touch points and goals.

Advocate

Advocate: someone who resonates and feels a deep connection with a certain brand/product. Advocate has used the brand/product for an extended period of time, publicly supports and recommends the cause and thus able to impart an emotional touch in its communication.

Content Creator

Content Creator: a type of influencer who specializes in making a valuable content intended for their followers. The type of value varies and not restricted to only story, aesthetics and/or information-packed contents.

Industry Leederr

Industry Leader: what defines Industry Leader in beauty industry is someone who has both the expertise and is able to discuss a certain topic from scientific perspectives. Industry leader usually comes from a strongly-related academic background to the issue or topic they raise (e.g: chemistry, dermatology, etc.) and quite often also a business owner.

Industry Expert

Industry Expert: the main differentiation of Industry Expert and the other categories is their experience. Industry Expert has considerable years of experience under their belt and has become a veteran and expert in that field. Their authority is usually more reflected on their years and ranges of experience.

Partner

Partner: business owner who is heavily involved in the business and management side of the beauty industry. Partner commonly shares their hands-on insight, perspectives and how their business thrives in the beauty industry.

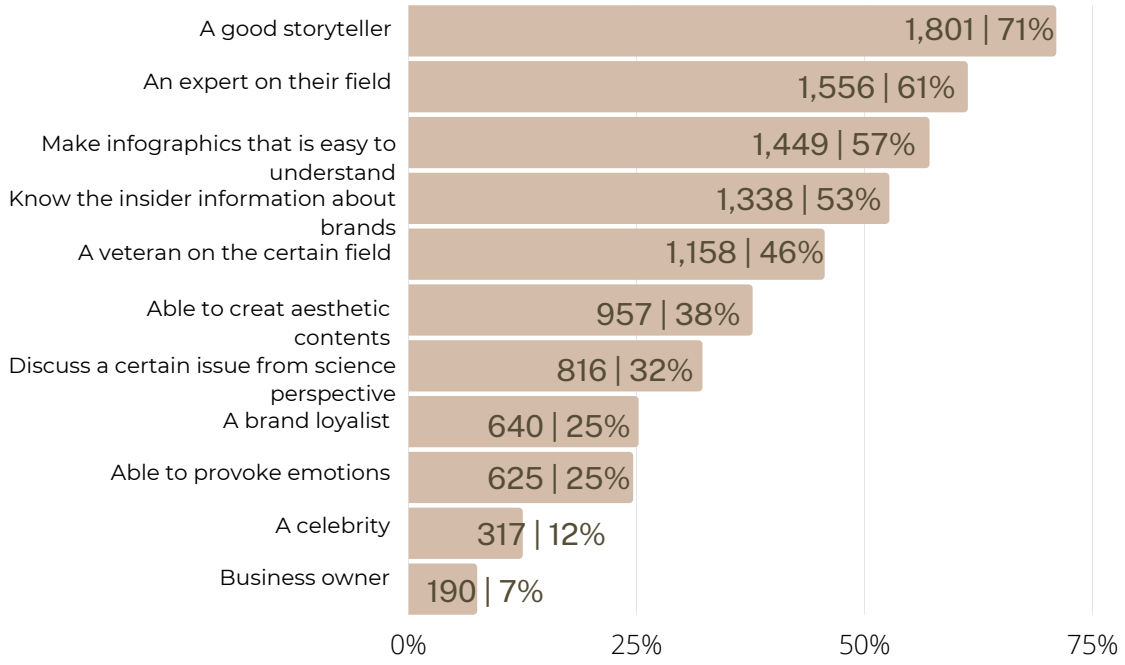
Celebrity

Celebrity: someone whose professions resulted in them being widely known by the public. Celebrity is commonly viewed as a more prestigious status at which their life and opinion are constantly made public and become of interest for many.

KEY OPINION LEADERS CHARACTERISTICS

WHAT BEAUTY ENTHUSIAST WANT IN A BEAUTY INFLUENCER

Having categorized influencers based on expertise, Venas digs deeper into the consumer insight by asking what the beauty enthusiasts look for in a beauty influencer. Based on our categorization, Venas Influencer Marketing Survey asks the respondents to freely choose the traits they want in a beauty influencer to gain holistic view on the consumer expectation.



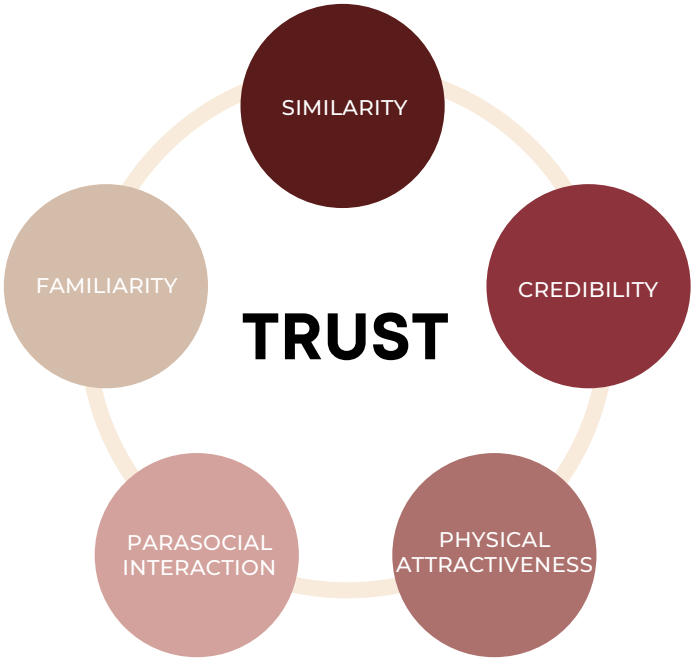
INSIGHT

- What makes a good storyteller? Articulate, unbiased, extensive product knowledge, provide many background information to the story
- People look more for expertise than celebrity status in an influencer
- People acknowledge that influencers can and will partner with various brands to create more varied reviews so they don't expect influencers to stay loyal to one particular brand.
- People love infographics even though video content is on the rise because information is easier to find in this format.

WHAT MAKES PEOPLE TRUST INFLUENCERS?

FACTORS THAT DEFINE TRUST IN INFLUENCERS

Seeing a plethora of influencers with various types and styles in Indonesian beauty industry, Venas prompts to gain deeper understanding in what constitute the trust of beauty enthusiasts towards influencers.



METHOD

Research articles cross-referencing and expert analysis were performed in order to determine factors that define consumer trust in influencers.
These factors were further elaborated through several determining items that were assessed through Likert-scale, from a scale of 1 to 4 (Strongly disagree - Strongly agree)

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- Al-Darraji et al. (2020). Similarity, Familiarity, and Credibility in influencers and their impact on purchasing intention.
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INFLUENCER SENTIMENT

Similarity
3.05/4.00

Similarity with each other will expose an individual to a greater interest and trust.

"Saya memiliki banyak kesamaan dengan influencer yang saya ikuti."	*"Saya dan influencer yang saya ikuti memiliki permasalahan kulit yang sama."*	*"Saya memakai produk – produk yang sama dengan influencer yang saya ikuti."*
3.15/4.00	3.12/4.00	2.89/4.00

Trust towards influencers is formed through similarity in skin concerns, rather than products.

Credibility
3.50/4.00

The followers of a credible influencer is less likely to question the influencer's assertion.

"Saya merasa influencer yang kredibel adalah influencer yang jujur."	*"Saya merasa influencer yang kredibel adalah influencer yang menuliskan pesan yang jelas di kontennya."*	*"Saya merasa influencer yang kredibel adalah influencer yang tidak terafiliasi dengan brand apapun."*
3.71/4.00	3.73/4.00	3.07/4.00

Likert scale: 1 - 4
(Strongly disagree - Strongly agree)

Brand affiliation does not correspond much with credibility. Honesty and clarity of the influencer's message are more determining.

INFLUENCER SENTIMENT

Physical Attractiveness 2.99/4.00

Influencers who demonstrate their attractive appearance might play an important role in persuading more followers to watch and trust their content.

"Saya merasa influencer adalah orang yang cantik/tampan."	*"Saya melihat influencer sebagai orang yang menarik secara fisik."*	*"Menurut saya, influencer adalah orang yang atraktif."*
2.74/4.00	2.90/4.00	3.34/4.00

Influencers are perceived as attractive, however being attractive is not enough to make them trustworthy.

Parasocial Interaction 3.23/4.00

A relationship that is often experienced as "seeking guidance from influencers, seeing influencers as friends, and seeking trusted source of information from influencers"

"Melihat influencer memakai produk tertentu di kehidupan sehari – harinya mendorong saya untuk membeli produk tersebut."	*"Pada awalnya, saya tidak ingin membeli produk ini tetapi ketika saya melihat influencer menggunakannya, saya benar-benar ingin membelinya."*	*"Saya tidak mau membeli produk yang mendapat review kurang baik dari influencer."*
3.41/4.00	3.20/4.00	3.09/4.00

Seeing an influencer uses a certain product in their daily life persuades followers to trust and buy that product.

Likert scale: 1 - 4
(Strongly disagree - Strongly agree)

INFLUENCER SENTIMENT

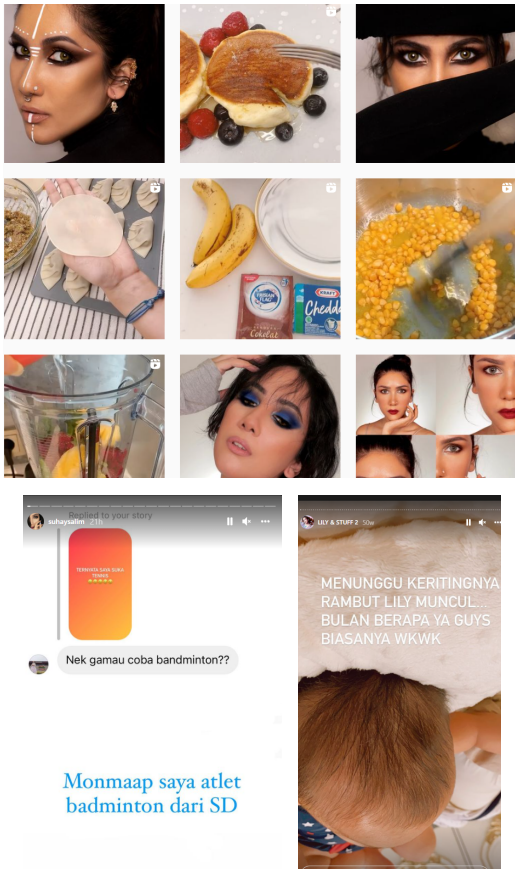
Familiarity
2.69/4.00

Familiarity gives a level of comfort to the followers towards the influencers, which leads to the influencers seeming more persuasive.

"Saya sudah sangat lama mengikuti influencer yang saya ikuti."	*"Saya memiliki hubungan pribadi dengan influencer yang saya ikuti."*	*"Saya mengerti orang seperti apa influencer yang saya ikuti."*
3.40/4.00	1.86/4.00	2.82/4.00

Familiarity with influencers <u>does not contribute</u> much in building trust.

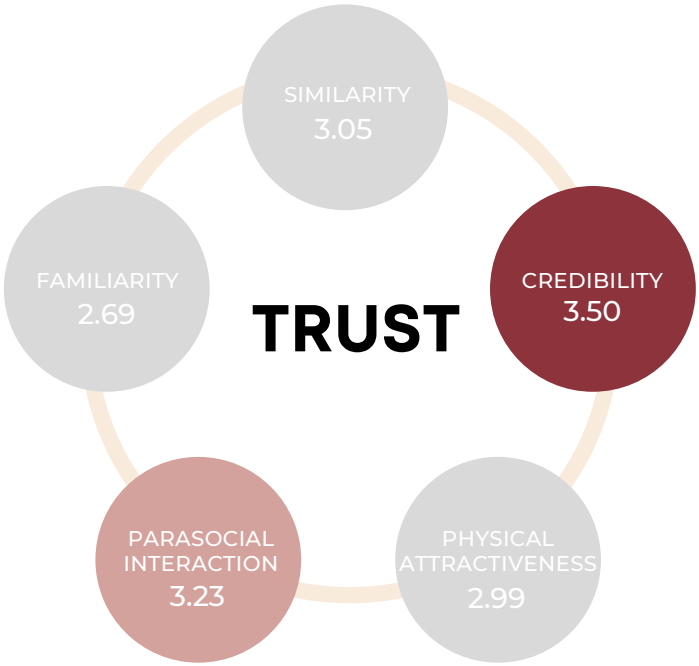
Likert scale: 1 - 4
(Strongly disagree - Strongly agree)



Gen Z shows a significantly higher value for Familiarity compared to other age groups.

Influencers who are popular with Gen Z tend to <u>actively communicate</u> with their followers and <u>share their daily life, habits, and hobbies.</u>

FACTORS THAT DEFINE TRUST IN INFLUENCERS



TOP 2 FACTORS

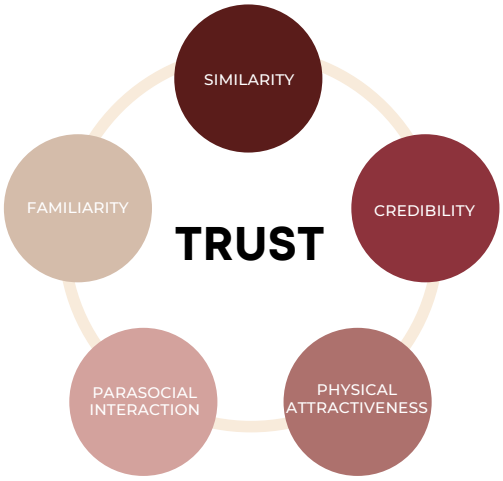
Venas signifies the top 2 factors that define trust in influencers as Credibility, followed by Parasocial Interaction. Credibility is the strongest Trust builders as it indicates honesty in how an influencer is genuinely interested and recommends a certain brand/product.

Parasocial Interaction adds a humane touch in Trust as it potrays the actual use of a certain product in an influencer's daily life. Parasocial interaction builds Trust through the indirect interpersonal relationship as a result of interaction and representation between influencers and followers.

PURCHASE INTENTION CORRELATION

IF SOMEONE TRUSTS A CERTAIN INFLUENCER, WOULD THEY PURCHASE THE PRODUCTS PROMOTED BY THAT INFLUENCER?

Subsequent analysis was performed to determine if there is a correlation between the trust attributes and purchase intention. In general, this survey respondents showcase a fairly strong tendency to purchase products recommended by influencers, as displayed by the scale of 3.10 out of 4.00



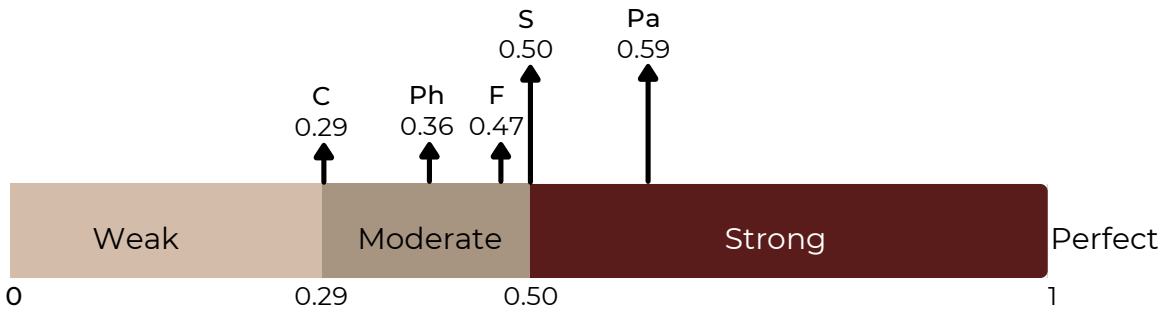
"Saya sangat sering membeli produk yang direkomendasikan oleh influencer."

3.10/4.00

PURCHASE INTENTION CORRELATION

To understand better about purchase intention correlation we analyzed the correlation using Pearson Analysis. and get a score for each factor.

Pearson Correlation shows that the strongest correlation with Purchase Intention is with Parasocial Interaction, followed by Similarity. This means that specifically for purchase intention, followers look more at how similar they are with the influencers (skin concerns, products, etc) and how the influencers interact and bond with them.



Legend

0	No correlation	C	Credibility
0.01 - 0.29	Weak	Ph	Physical Atractiveness
0.3 - 0.49	Moderate	F	Familiarity
0.5 - 0.99	Strong	S	Similarity
1	Perfect correlation	Pa	Parasocial Interaction

It can be seen in the description above, a score of 0 means that there is no correlation. 0.01 - 0.29 is weak, and so on and so forth. From the analysis results, the strongest correlation with purchase intention is with Parasocial Interaction, closely followed by similarity.

This means that specifically for purchase intention, followers look more at how similar they are with the influencers (skin concerns, products, etc) and how the influencers interact and bond with them.

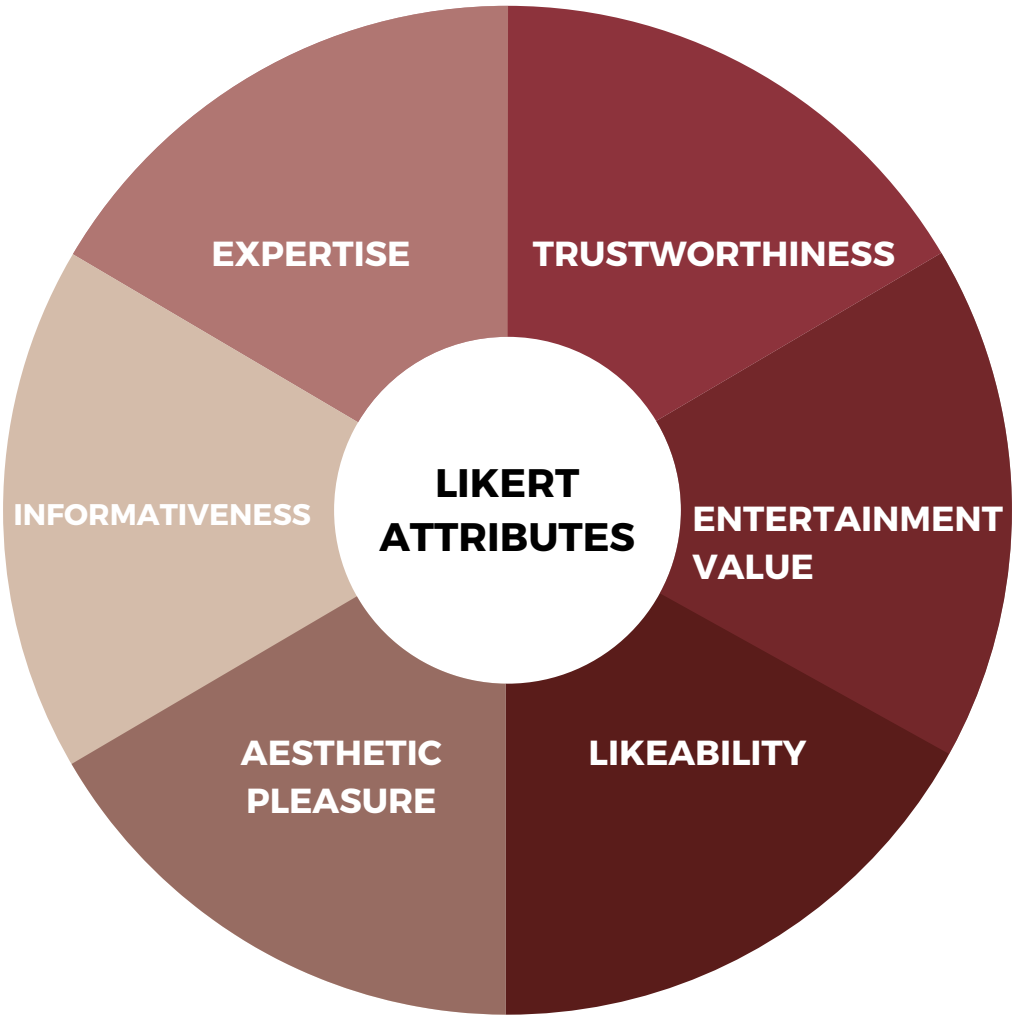
However, it should be noted that followers will not even be triggered to purchase if the influencers lack credibility and for them to trust to begin with. Brands should focus more on the social attractiveness of influencers, such as their lifestyle or personalities, and their similarity to target consumers.

PARASOCIAL INTERACTION IS IMPORTANT FOR BOTH TRUST AND PURCHASE INTENTION.

In order to build awareness or trust, engage influencers with higher credibility.

In order to drive product sales, engage influencers with skin concerns that are closely matched with products key benefits.

INFLUENCER SENTIMENT



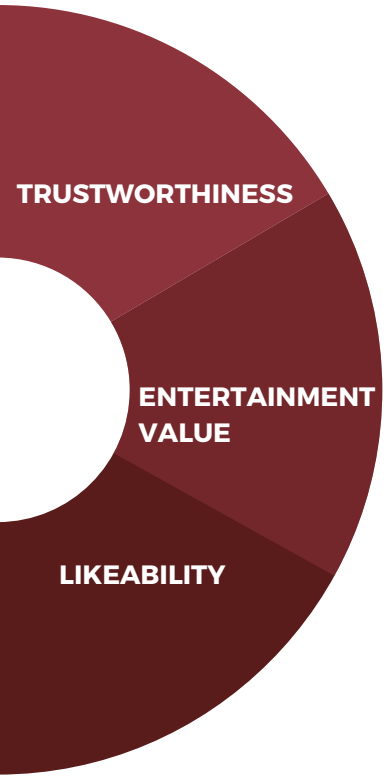
METHOD

Following the observation in general trust towards influencers, Venas did a deeper research towards how the consumers perceive a certain influencer's contents. Research articles cross-referencing and expert analysis in the current influencer landscape are performed in order to construct the six trait attributes.

Each attribute is evaluated through Likert-scale assessment
(1: Strongly disagree - 4: Strongly agree) on each respective determining items.

This assessment is done based on the influencer mentioned by each respondent and would construct that influencer's unique persona.

LIKERT ATTRIBUTES DEFINITION



TRUSTWORTHINESS

The degree of confidence in the influencer's intent to communicate the assertions he/she considers most valid.

- *Saya melihat ketulusan yang kuat dalam konten yang dibuat influencer tersebut.*
- *Saya merasa bahwa konten yang dibuat oleh influencer tersebut sangat bisa dipercaya.*
- *Saya tidak meragukan kejujuran dari konten influencer tersebut.*

ENTERTAINMENT VALUE

The degree in which the followers perceive a certain influencer's content as their source of entertainment.

- *Konten dari influencer tersebut sangat menghibur saya.*
- *Saya merasa bahagia ketika saya menyimak konten dari influencer tersebut.*
- *Menurut saya konten dari influencer tersebut sangat seru.*

LIKEABILITY

The affective emotion that the followers perceive as a result of an influencer persona.

- *Saya menganggap influencer tersebut orang yang sangat ramah.*
- *Saya ingin berteman dengan influencer tersebut.*
- *Saya merasa sangat bisa meminta pendapat dan saran dari influencer tersebut.*

EXPERTISE

The extent to which an influencer is perceived to be a source of valid assertions.

- *Menurut saya, influencer tersebut merupakan expert di bidangnya.*
- *Saya melihat influencer tersebut sebagai orang yang sangat berpengalaman di bidangnya.*
- *Saya merasa Influencer tersebut memiliki pengetahuan yang tinggi dalam bidangnya.*

INFORMATIVENESS

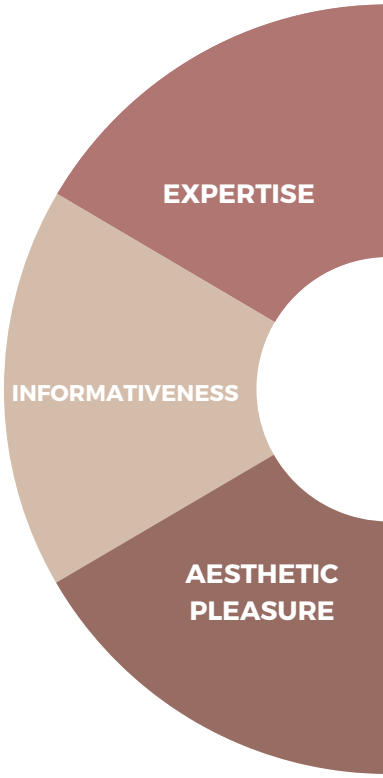
The essence of information providence lies in how valuable that information is for the followers.

- *Konten dari influencer tersebut memberikan informasi yang sangat berguna bagi saya.*
- *Review dari influencer tersebut sangat membantu saya dalam memahami sebuah produk atau pelayanan yang dibahas.*
- *Konten influencer tersebut memberikan saya informasi yang tidak dapat saya peroleh dari influencer lainnya.*

AESTHETIC PLEASURE

The visual appeal perceived from a certain influencer's content.

- *Konten dari influencer tersebut sangat menyenangkan untuk dilihat.*
- *Saya merasa konten dari influencer tersebut sangat atraktif secara visual.*
- *Influencer tersebut memiliki konten yang sangat cantik untuk dilihat.*



TOP 5 MENTIONED INFLUENCERS WITH SENTIMENTS

ANOVA ANALYSIS

One-way ANOVA test was performed in order to know whether there is any significant difference in attributes between influencers. The result of the test can be seen in the following table.

ATTRIBUTES	INFLUENCERS	MEAN (S.D)
EXPERTISE	Tasya Farasya	3.83 (0.35)[a]
	Suhay Salim	3.44 (0.52)[b]
	Lifni Sanders	3.39 (0.55)[b]
	Kinan's Review	3.51 (0.50)[b]
	Affi Assegaf	3.80 (0.38)[a]
TRUSTWORTHINESS	Tasya Farasya	3.73 (0.42)[b]
	Suhay Salim	3.64 (0.46)[c]
	Lifni Sanders	3.80 (0.37)[a]
	Kinan's Review	3.83 (0.34)[a]
	Affi Assegaf	3.77 (0.42)[b]
INFORMATIVENESS	Tasya Farasya	3.75 (0.39)[a]
	Suhay Salim	3.58 (0.47)[c]
	Lifni Sanders	3.70 (0.44)[b]
	Kinan's Review	3.76 (0.34)[a]
	Affi Assegaf	3.72 (0.39)[b]
ENTERTAINMENT VALUE	Tasya Farasya	3.70 (0.45)[a]
	Suhay Salim	3.71 (0.45)[a]
	Lifni Sanders	3.75 (0.41)[a]
	Kinan's Review	3.32 (0.62)[b]
	Affi Assegaf	3.39 (0.52)[b]
AESTHETIC PLEASURE	Tasya Farasya	3.75 (0.42)[a]
	Suhay Salim	3.41 (0.57)[b]
	Lifni Sanders	3.36 (0.59)[b]
	Kinan's Review	3.43 (0.60)[b]
	Affi Assegaf	3.16 (0.58)[c]
LIKEABILITY	Tasya Farasya	3.61 (0.53)[a]
	Suhay Salim	3.34 (0.64)[b]
	Lifni Sanders	3.59 (0.48)[a]
	Kinan's Review	3.55 (0.44)[a]
	Affi Assegaf	3.60 (0.45)[a]

Mean (S.D.) values bearing different letter indicate significant difference

In terms of Expertise, Tasya Farasya and Affi Assegaf were perceived to be the most expert, followed by Suhay Salim, Lifni Sanders and Kinan's Review in the shared second place.

Looking at Trustworthiness, Kinan's Review and Lifni Sanders share the first place, followed by Affi Assegaf and Tasya Farasya in the second place and finally Suhay Salim.

Tasya Farasya and Kinan's Review were perceived as having the most informative content, followed by Affi Assegaf and Lifni Sanders, then Suhay Salim in the third place.

Lifni Sanders, Suhay Salim and Tasya Farasya show a significantly higher Entertainment Value in their content compared to Affi Assegaf dan Kinan's Review.

Aesthetically speaking, the respondents perceive Tasya Farasya's content to be the most pleasing. Kinan's Review, Suhay Salim and Lifni Sanders' contents were perceived to have significantly lower aesthetic pleasure compared to Tasya Farasya's but significantly higher than Affi Assegaf's.

In terms of Likeability, interestingly Tasya Farasya, Lifni Sanders, Kinan's Review and Affi Assegaf were perceived to be significantly higher than Suhay Salim.

The analysis shows that each influencer has their own uniqueness, as shown by a specifically stronger perception in one attribute compared to the others. The mix of these attributes shapes their persona and how people perceive their contents.

AMPLIFY BRAND COMMUNICATION BY CHOOSING INFLUENCERS WITH THE MOST SUITABLE TRAITS.

Influencers selection can be optimized by matching brand's current communication purpose with the influencers' perceived traits.

PART 4: INFLUENCER MARKETING IN BEAUTY

FORECAST 2022

GEN Z DEMANDS ACCOUNTABILITY FROM BRANDS AND WOULD ACT UPON IT.

"As Gen Z, we are more concerned about the products we use and consume.

We are more sensitive towards ethical issues such as exploitation and animal testing.

I will think twice about buying from brands that are found "guilty".

In general, me and my peers are actively looking for brands whose values align with ours."

VENAS INSIGHT

More than ever, consumers are choosing brands who stand behind values that are aligned with their own. So beauty brands need to show stronger stance in key issues or communicate them more purposefully.

Collaboration with influencers who are outspoken about these issues can help brands strengthen their positions among beauty community.

Separating this effort with brands' regular product / sales campaigns will be key in ensuring the message will be well received.

2022 IS THE YEAR OF CREATOR ECONOMY

- More collaborations between content creators will happen where they can leverage each other's viewership across different platforms.
- Social media platforms will be more aggressive in providing tools/features for creators to make different types of content.
- More stringent regulation might start to be implemented.
- Social Commerce will get bigger and more prominent.
- TikTok will keep growing its user base in Indonesia and more beauty content creators will emerge.
- The demand for transparency in influencer marketing coming from the consumers, creators and brands.
- Beauty influencers will sharpen their specialty even further.
- There will be even more diversity among beauty influencers.

WHAT'S NEXT?

Influencer marketing, though can be tricky, is still one of the most effective way to grow your reputation and credibility. That is why it's important to implement this to your brand's marketing strategy, but most importantly, it has to be done right.

Have any questions and want to discuss further about Influencer Marketing trend or any other trends in beauty? Please drop us a line at **info@venasconsulting.com**
We'd like to hear from you.

ABOUT VENAS

We are a consulting firm specializing in the beauty industry that delivers data-driven and targeted solutions for brands aiming to be at the forefront of consumers' minds.

Venas was founded in February 2020 by 3 highly driven women who are industry veterans, combining a multitude of skills and a deep understanding of the beauty audience.

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APPENDIX

PAPER REFERENCE
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KEYWORDS USED ON KALEIDOSCOPE

SKINCARE CATEGORY

Core Treatment
- Cleanser
- Toner
- Moisturizer
- Sunscreen

Targeted Treatment
- Serum
- Ampoule
- Essence
- Oil
- Mask

Eye Treatment
- Eye Serum
- Eye Cream
- Eye Ampoule

Lip Treatment
- Lip Balm
- Lip Serum
- Lip Mask

MAKEUP CATEGORY

Complexion
- Contour
- Foundation
- Cushion
- Blush
- Highlighter
- Primer
- Powder
- Bedak

Colors product
- Brow
- Shadow
- Liner
- Mascara
- Lipstik
- Pensil

CITATION POLICY

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