

INNOVATING TO IMPACT

dentsu

US EDITION

# ALMOST FAMOUS: INFLUENCERS' GROWING IMPACT ON U.S. CONSUMER HABITS

JULY 2025

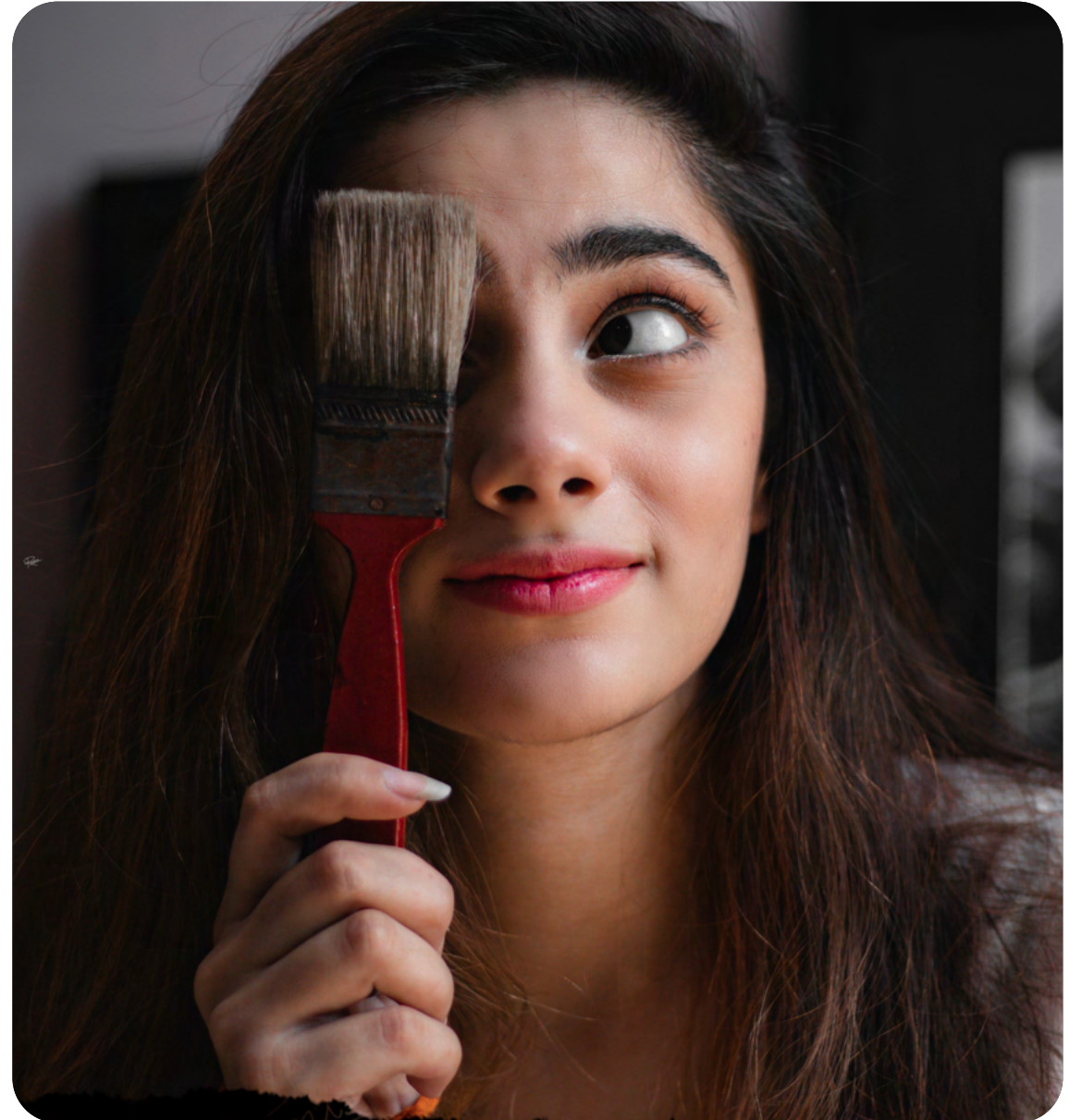


PART OF THE DENTSU CONSUMER NAVIGATOR SERIES



## ABOUT THIS STUDY

- The survey was conducted by dentsu via Toluna, an online research panel.
- Administered on July 7, 2025.
- Distributed among a random sample of 1,000 U.S. respondents 18 years of age or older.
- Controls for nationally representative weighting across age, gender, region, race and ethnicity (using the latest publicly available U.S. Census numbers)



# OUR THEMES

- 01 TOP CONSUMER INSIGHTS**
- 02 HOW CONSUMERS ARE ENGAGING WITH INFLUENCER CONTENT**
- 03 INFLUENCERS' IMPACT ON PURCHASING DECISIONS**
- 04 DISCOVERING INFLUENCERS AND THEIR CONTENT**
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# TOP CONSUMER INSIGHTS

## THE SOCIAL INTERNET IS REORIENTING AROUND INFLUENCERS VS. PLATFORMS

Most followers engage influencers across multiple platforms, denoting how our media consumption is now driven by the personalities we engage with as opposed to the platforms we already use. Celebrities are the most followed personalities, but there are significant nuances across cohorts.

## TRUST IS THE NEW CURRENCY—NOT EVERY BRAND PARTNERSHIP EARNS IT

Consumers expect influencers to be transparent about brand involvement in the content they produce, and they expect them to partner with brands, products, and services that are pertinent to their field of expertise. Over-posting sponsored content is considered an offense worthy of unfollowing.

## FROM INFLUENCE TO ACTION: THE NEW RULES OF CONSUMER PERSUASION

Typically, the more time passes the less likely an influencer-inspired purchase will take place. Notable exceptions: In-person purchases usually take place after some research, and influencer-inspired B2B purchases can take as long as a week.

## CONVICTION OVER COUPONS: CONSUMERS WANT PROOF, NOT JUST PROMOS

Posts explaining product/service benefits and posts where influencers are trying products and services or using them in daily lives are considered by consumers to be more effective in inspiring purchases than discount codes, vouchers, product unboxing posts or content where brand representatives are being interviewed.

## INFLUENCER DISCOVERY ISN'T ONE-SIZE-FITS-ALL—PLATFORM CHOICE REFLECTS INTENT

YouTube is the platform where most influencer discovery takes place and is especially trusted for its algorithmic recommendations. On the other hand, Instagram is most used when chasing hashtags and is considered to be the platform with the best search capabilities.

## AS AI FILLS THE FEED, HUMAN VOICE BECOMES A PREMIUM ASSET

Half of consumers say they are turning to human creators as a reaction to the increasing amount of AI-optimized and AI-generated content they see online. AI usage on behalf of human creators is tolerated as long as the ideas and personalities of influencers continue to be reflected in the content.





# HOW CONSUMERS ARE ENGAGING WITH INFLUENCER CONTENT

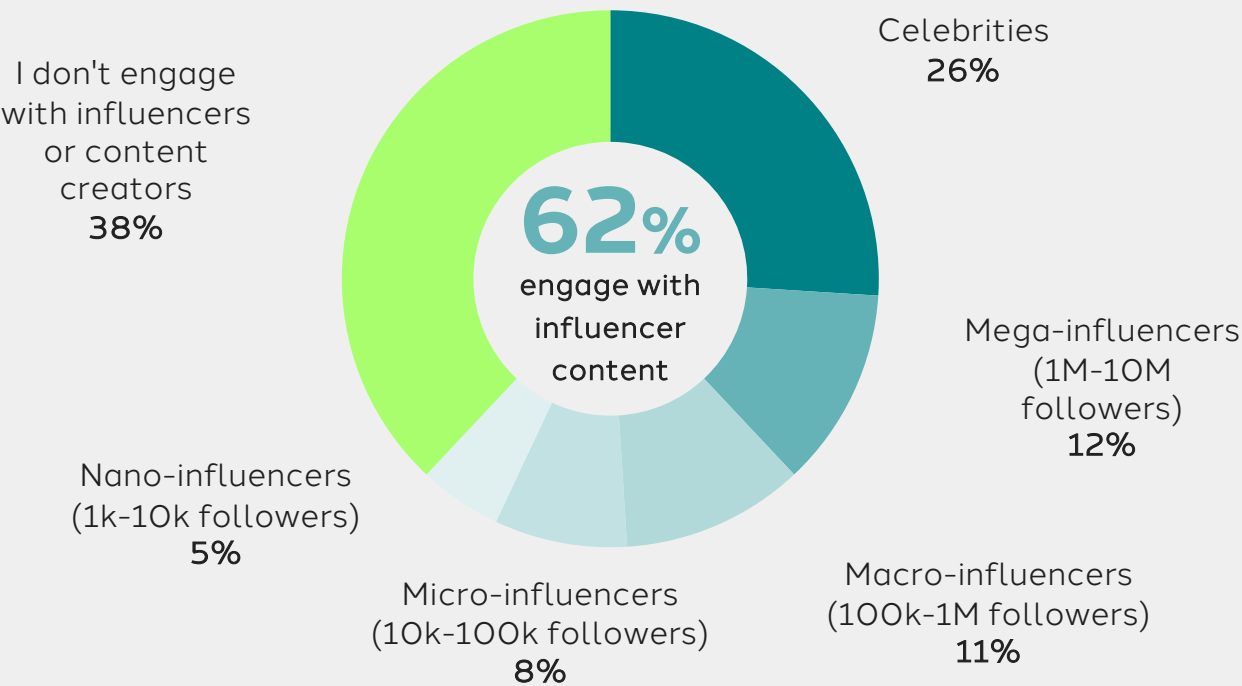




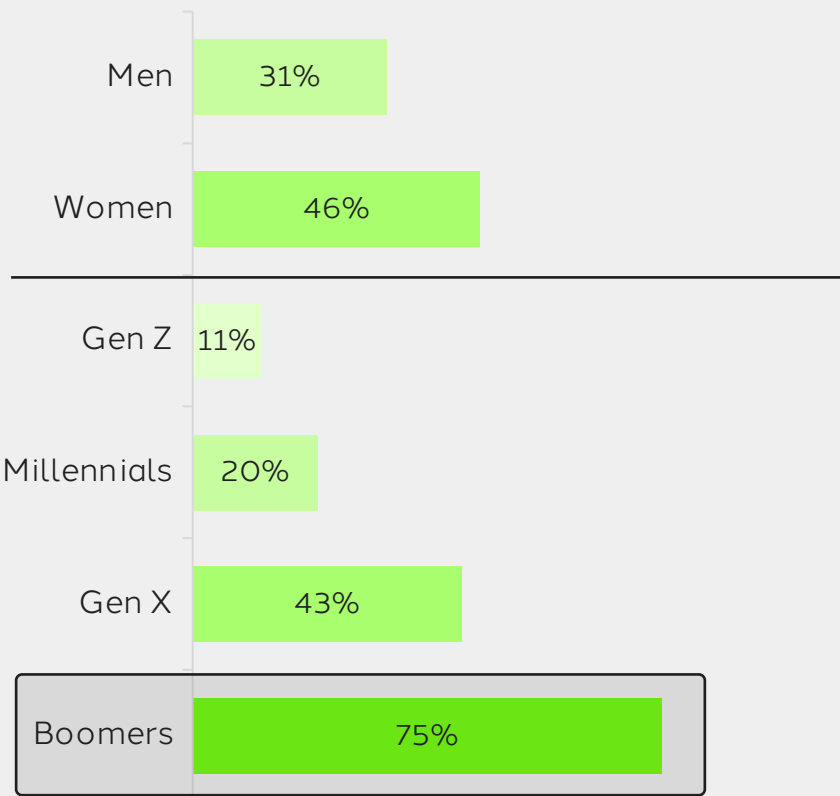
# MOST CONSUMERS ENGAGE WITH INFLUENCER CONTENT.

Celebrities are followed at twice the rate of mega influencers – proof that fame still holds our attention. Boomers over-index on not engaging with influencer content.

## WHICH, IF ANY, OF THE FOLLOWING TYPES OF INFLUENCERS DO YOU ENGAGE ONLINE WITH MOST OFTEN?



## “I DON’T ENGAGE WITH INFLUENCER CONTENT”



# GEN Z CONSUMERS GRAVITATE TOWARDS MEGA AND MACRO INFLUENCERS.

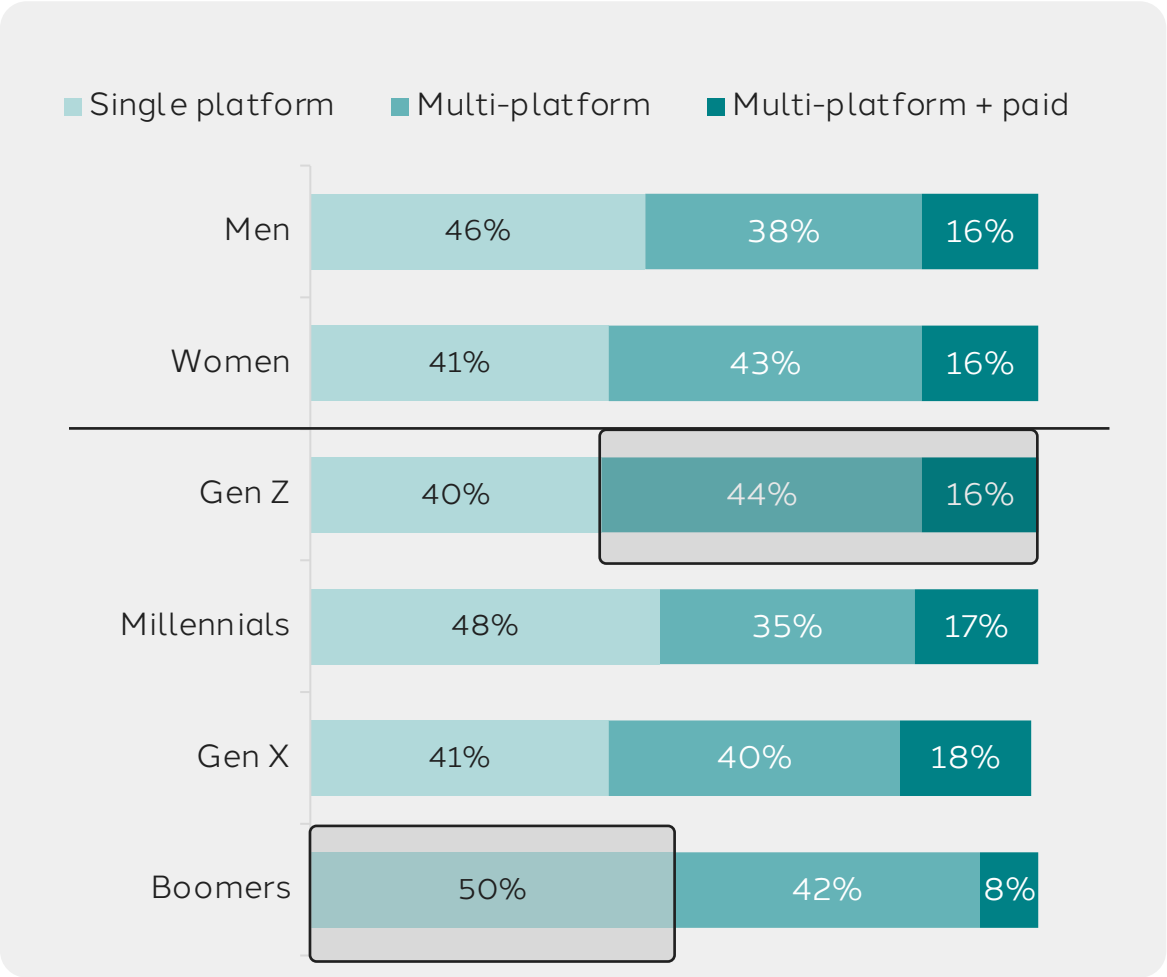
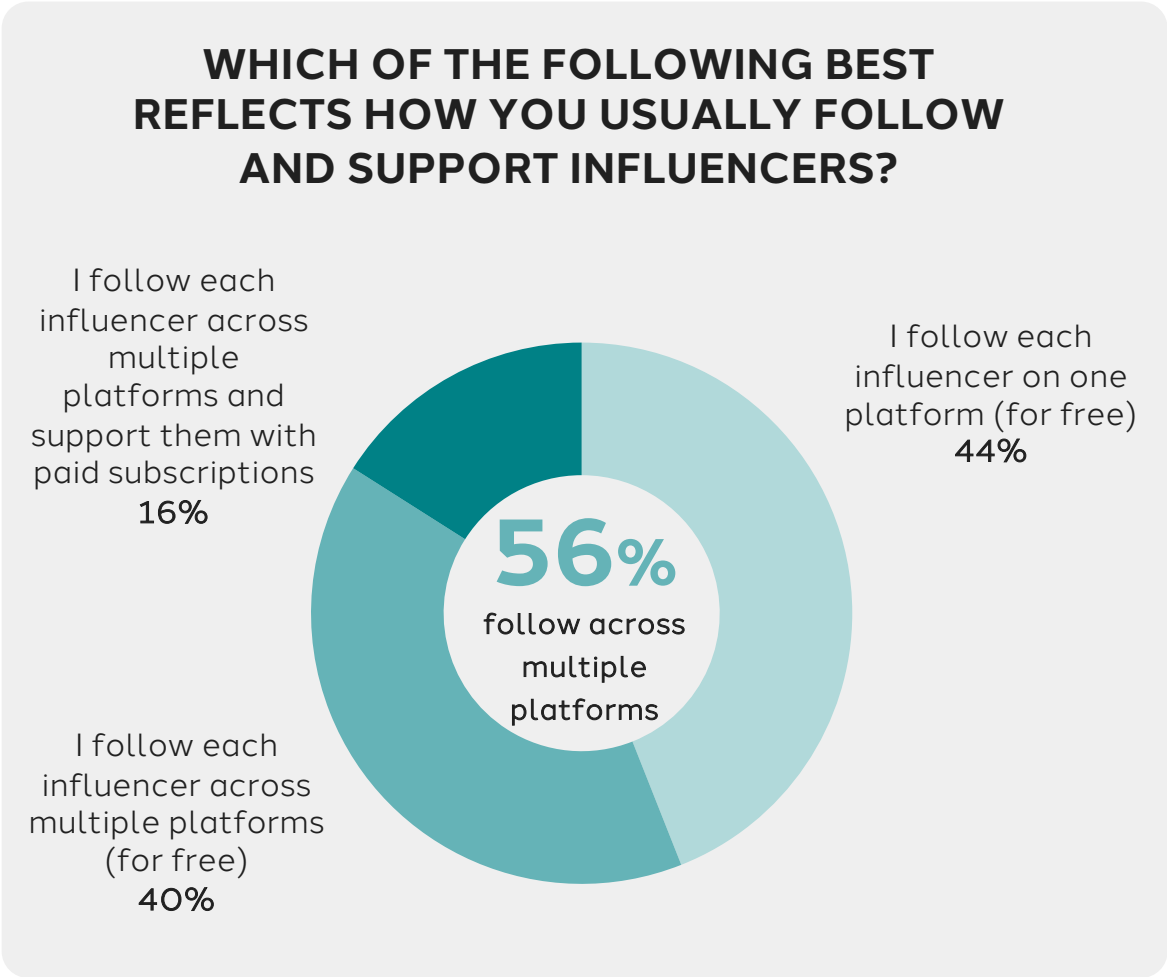
On the other hand, Gen X are more likely to engage with nano-influencers (1-10k followers).

WHICH, IF ANY, OF THE FOLLOWING TYPES OF INFLUENCERS DO YOU ENGAGE WITH ONLINE?					
MEN	WOMEN	GEN Z	MILLENNIALS	GEN X	BOOMERS
Celebrities (123i)	Macro-influencers (106i)	Mega-influencers (166i)	Celebrities (123i)	Nano-influencers (120i)	n/a
Mega-influencers (111i)	n/a	Macro-influencers (163i)	Mega-influencers (111i)	Micro-influencers (113i)	n/a
Micro-influencers (105i)	n/a	Micro-influencers (150i)	Micro-influencers (105i)	n/a	n/a



# MOST CONSUMERS FOLLOW INFLUENCERS ACROSS MULTIPLE PLATFORMS.

This is especially true of Gen Zers. Conversely, Boomers over-index on following influencers on a single platform.

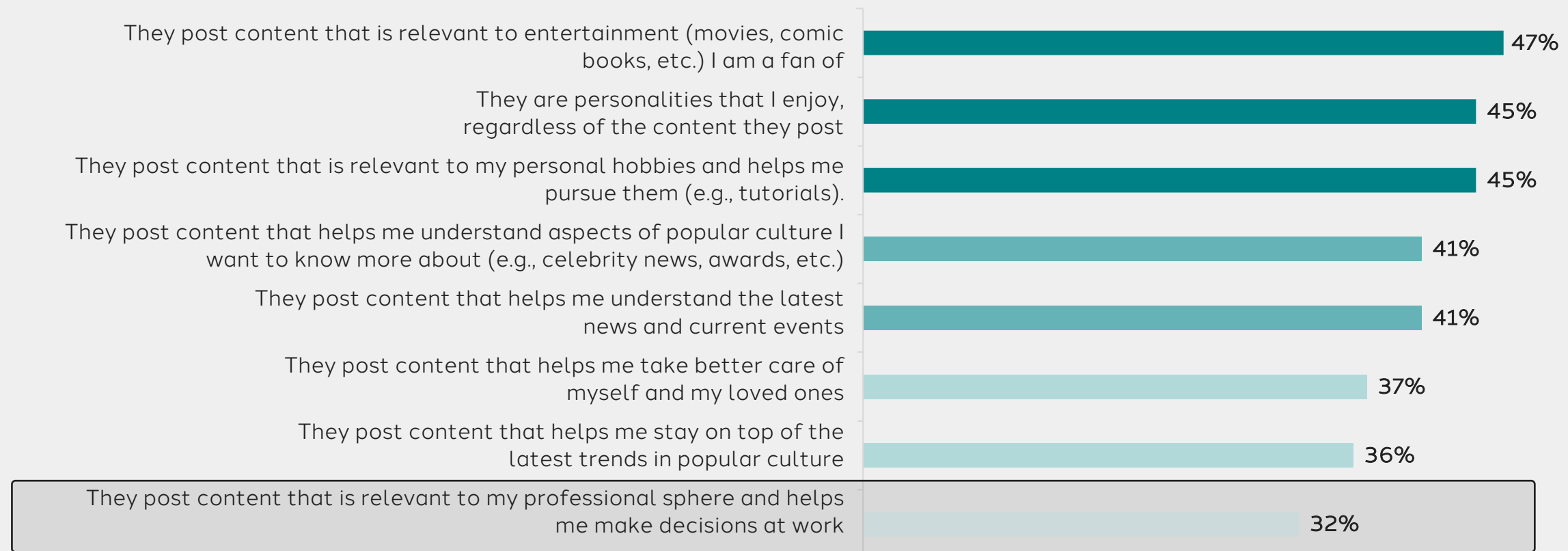




# ENTERTAINMENT CONTENT, PERSONALITY, AND TUTORIALS ARE THE BIGGEST DRIVERS FOR INFLUENCER FOLLOWING.

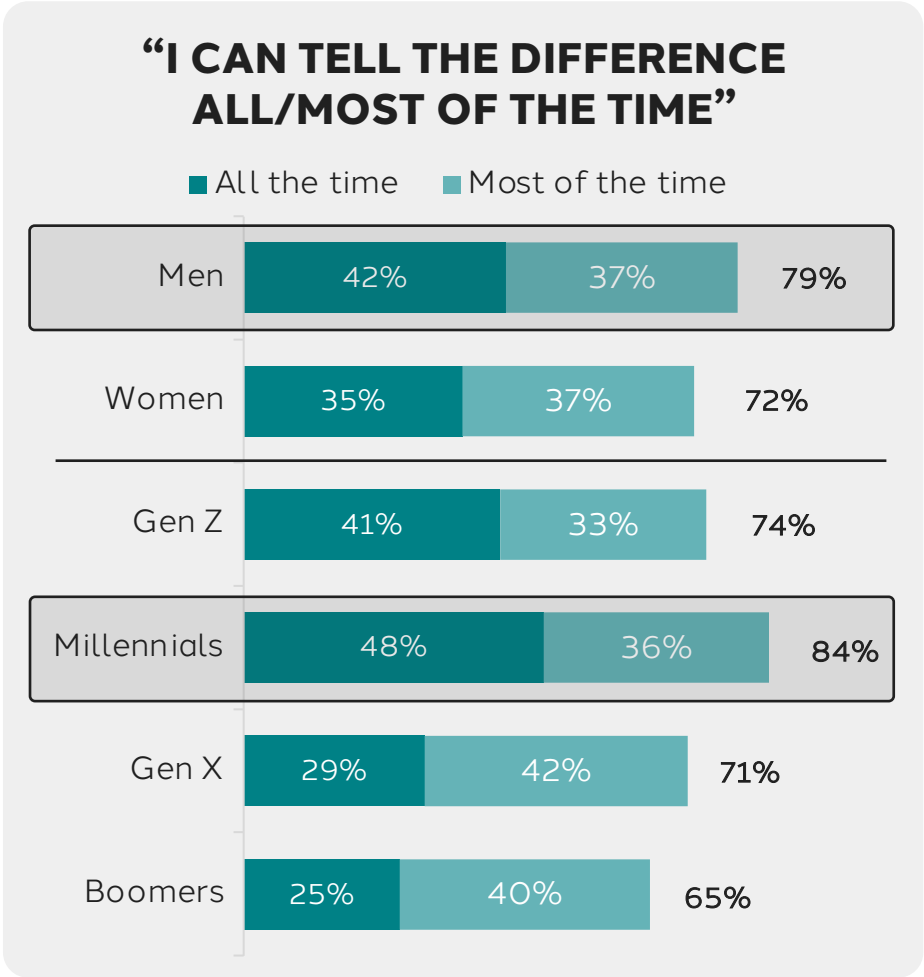
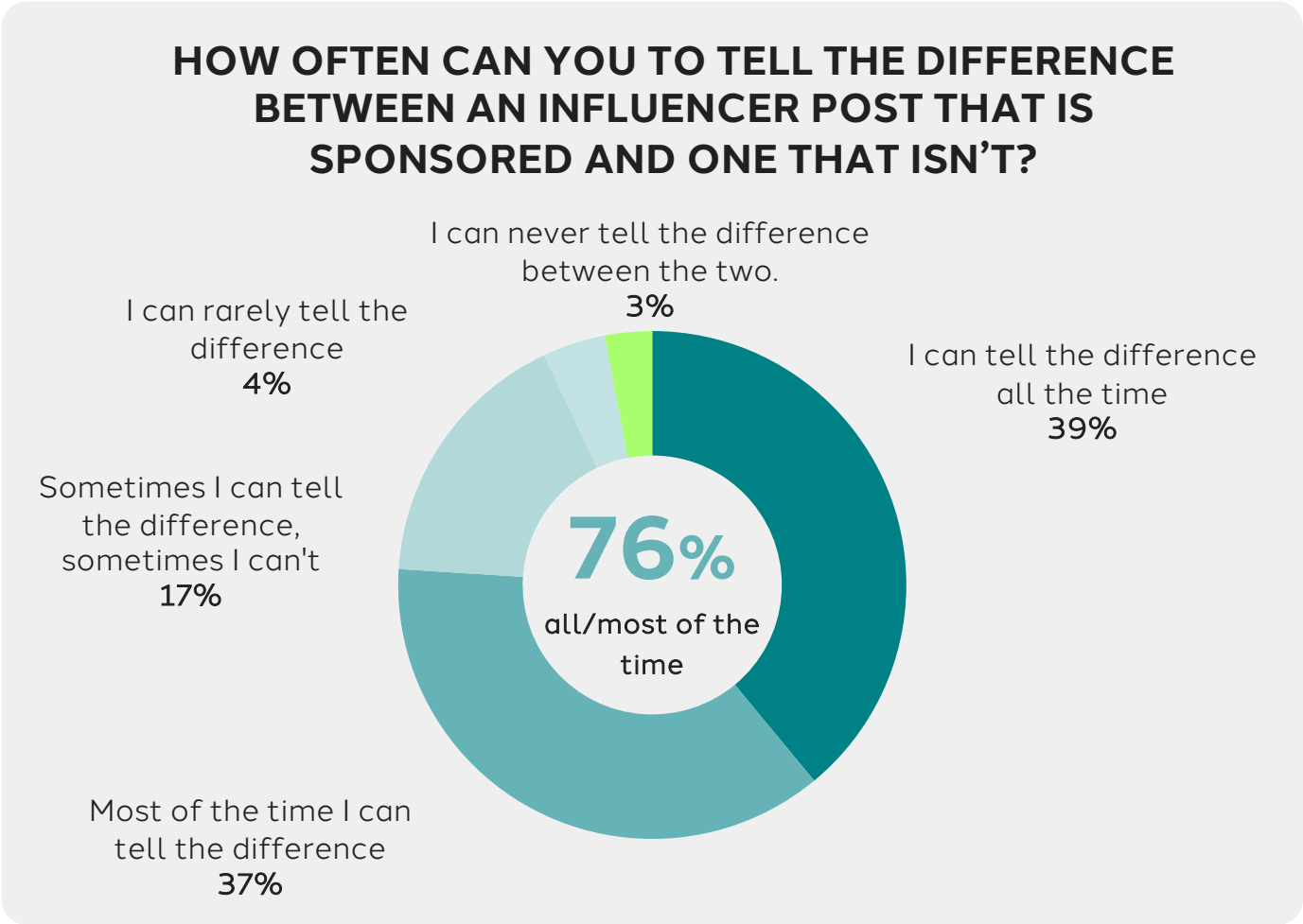
While it is the least chosen option, as many as 3 in 10 respondents indicate following influencers to make decisions in their professional sphere.

## WHICH OF THE FOLLOWING REASONS BEST REFLECT WHY YOU ENGAGE WITH INFLUENCERS?



# MOST CONSUMERS ARE CONFIDENT IN THEIR ABILITY TO DISCERN SPONSORED CONTENT FROM INFLUENCERS.

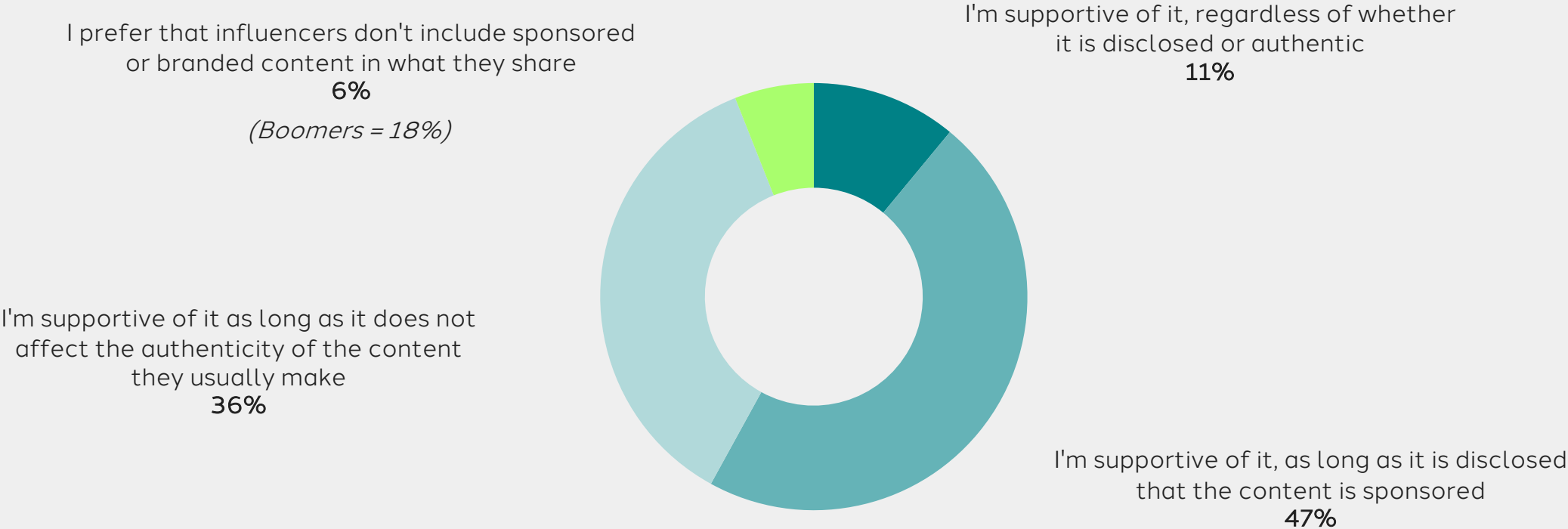
Men and Millennials are the most confident in their ability to tell when influencer content is sponsored.



# MOST CONSUMERS SUPPORT INFLUENCERS POSTING SPONSORED CONTENT, BUT TRANSPARENCY AND AUTHENTICITY ARE KEY.

Only 6% of respondents are against sponsored content altogether. The share rises significantly among Boomers.

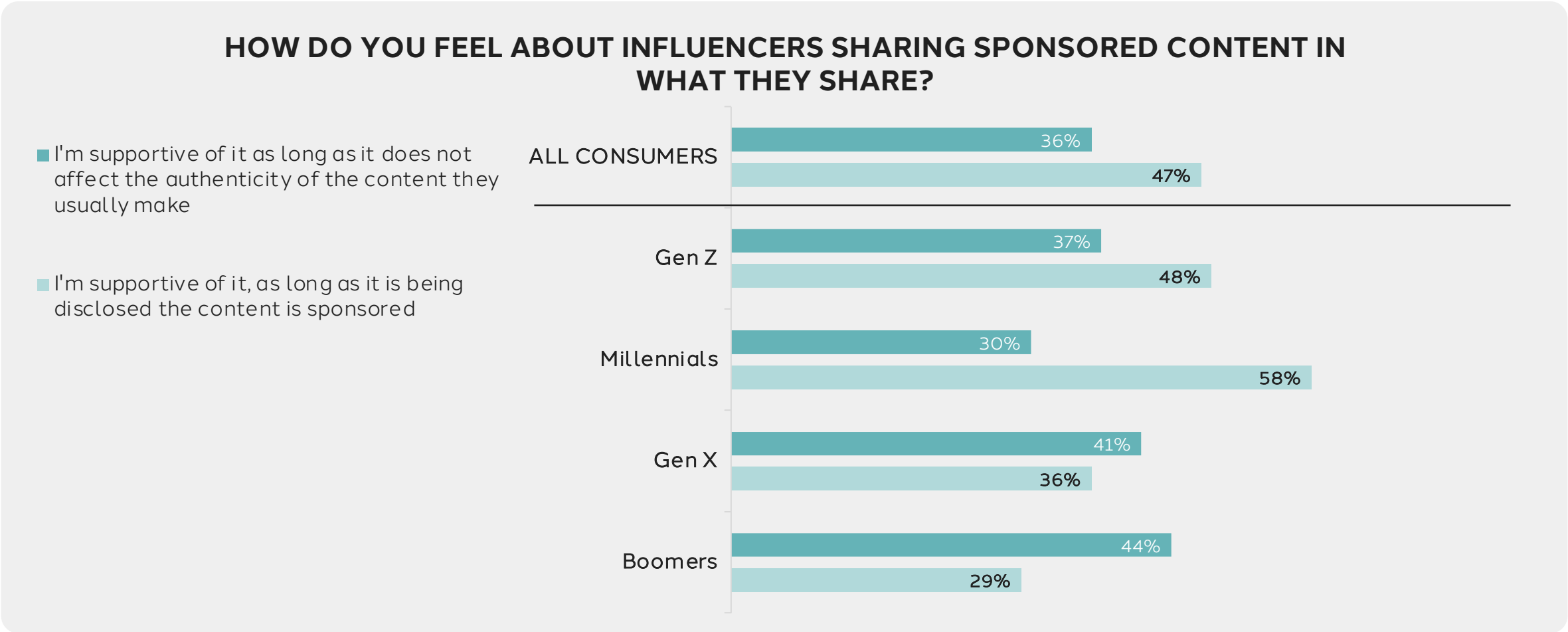
## HOW DO YOU FEEL ABOUT INFLUENCERS INCLUDING SPONSORED CONTENT IN WHAT THEY SHARE?





# WHEN IT COMES TO SPONSORED CONTENT, TRANSPARENCY IS VALUED ABOVE AUTHENTICITY, BUT THERE ARE SIGNIFICANT NUANCES ACROSS COHORTS.

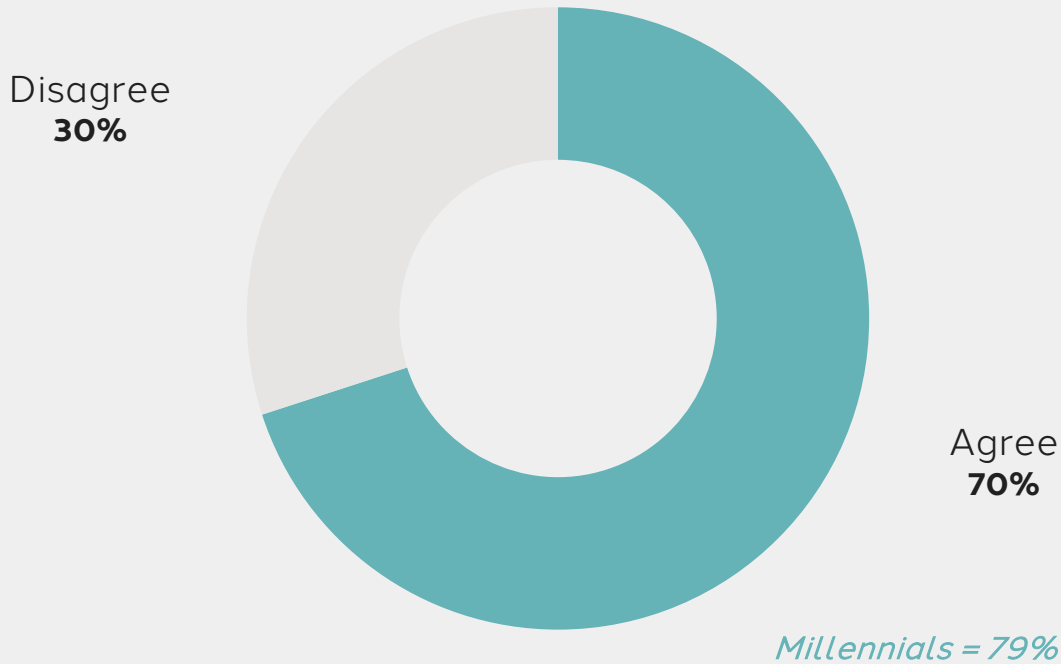
Surprisingly, Gen X and Boomers put authenticity above transparency, while Gen Z and Millennials do the opposite. There are no significant differences between Men and Women.



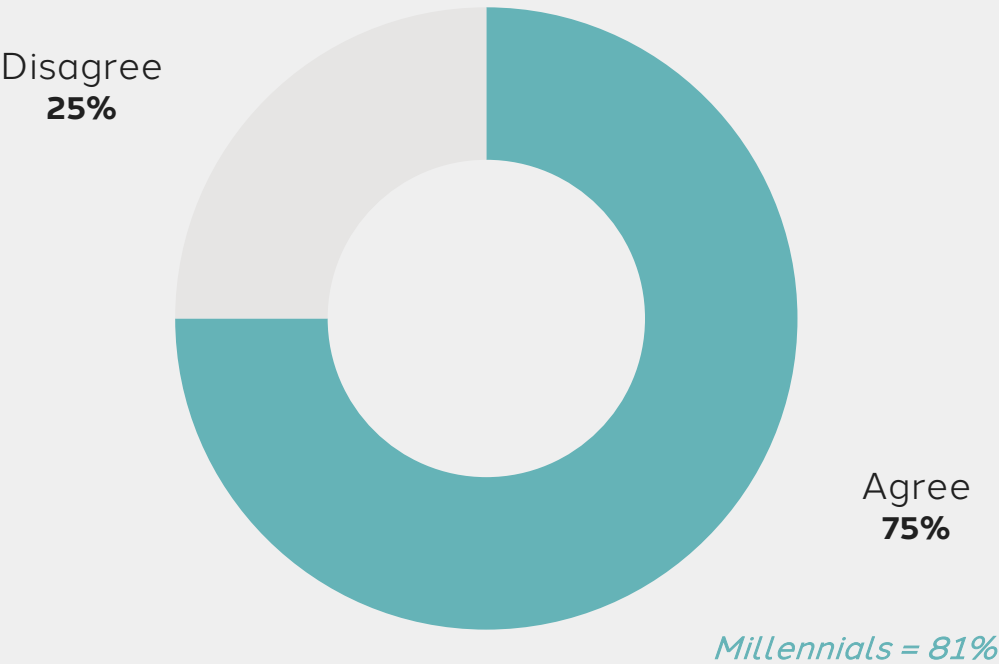
# CONSUMERS ARE OK WITH SPONSORED CONTENT AS LONG AS IT'S FREE TO ACCESS. ITS INCLUSION IN PAID CONTENT IS REJECTED.

They also expect sponsored content to revolve around the same topics they usually post about.

“I EXPECT THE PAID CONTENT I RECEIVE FROM INFLUENCERS I SUPPORT/SUBSCRIBE TO BE FREE OF SPONSORED CONTENT”



“INFLUENCERS SHOULD ONLY MAKE SPONSORED CONTENT THAT IS RELATED TO THEIR FIELD OF EXPERTISE THEY NORMALLY COVER IN THEIR REGULAR CONTENT”

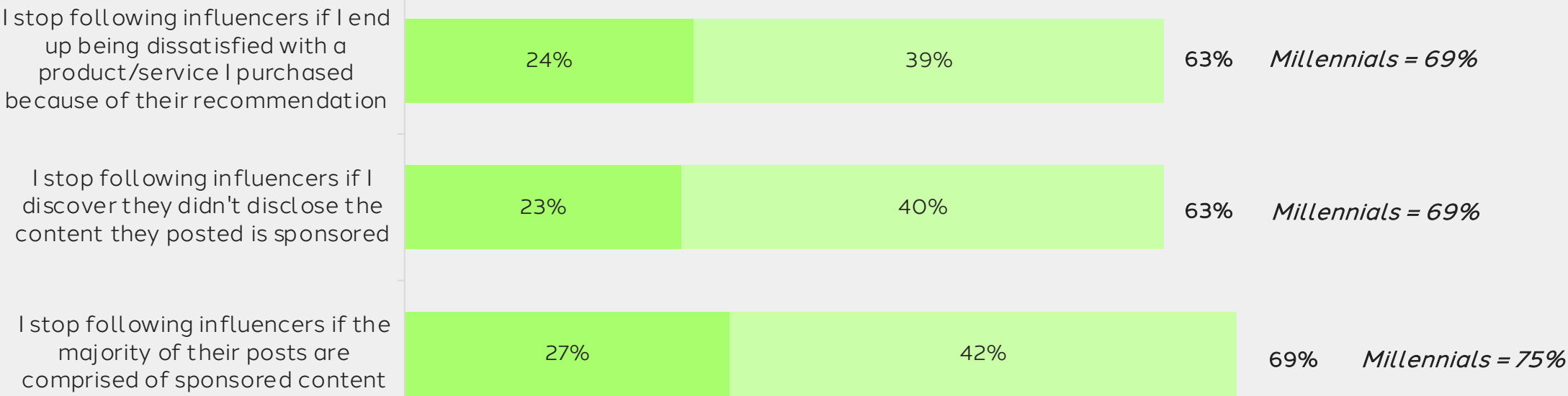


# OVER-RELIANCE ON SPONSORED CONTENT IS CONSIDERED A WORSE OFFENSE THAN LACK OF TRANSPARENCY OR BAD RECOMMENDATIONS.

Once again, Millennials stand out as the cohort that is significantly more likely to pay attention and stop following.

## WHICH, IF ANY, OF THE FOLLOWING WOULD CAUSE YOU TO STOP FOLLOWING INFLUENCERS YOU ENGAGE WITH?

■ Strongly agree   ■ Somewhat agree





# IMPLICATIONS FOR MARKETERS

## THINK IMPACT VS. REACH.

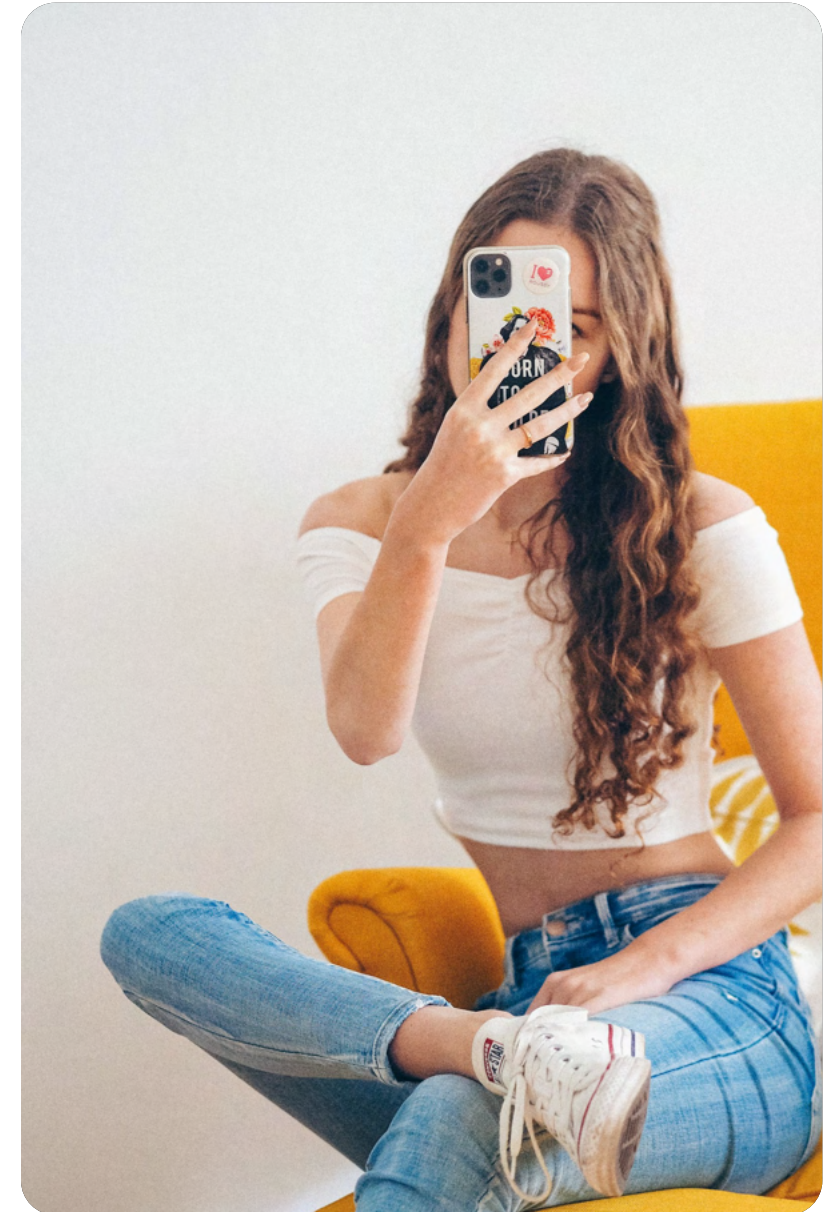
Different cohorts over-index on engaging with different categories of influencers, so don't assume that the size of the following equals the campaign's success. Furthermore, consider the platforms that are already a part of your marketing mix and which influencers have a footprint that naturally overlaps with them, as most consumers will engage with them beyond a single channel.

## KEEP INFLUENCERS IN THE DRIVER'S SEAT.

When it comes to sponsored content, consumers expect transparency and want this type of content to be adjacent to the influencer's wheelhouse. No one knows what works with their follower base as well as creators themselves. As opposed to handing them prescriptive briefs, let them pitch you their ideas for how your brand might fit it.

## THINK 'SPECIAL' AND 'TARGETED' INFLUENCER PARTNERSHIPS.

Overexposure in branded content can be a turn-off for consumers, and so can be showing up in the wrong influencer's stories. Work with experts who understand the influencer landscape and can determine where there is a natural fit between your products/services' value proposition and different creators' content specializations.





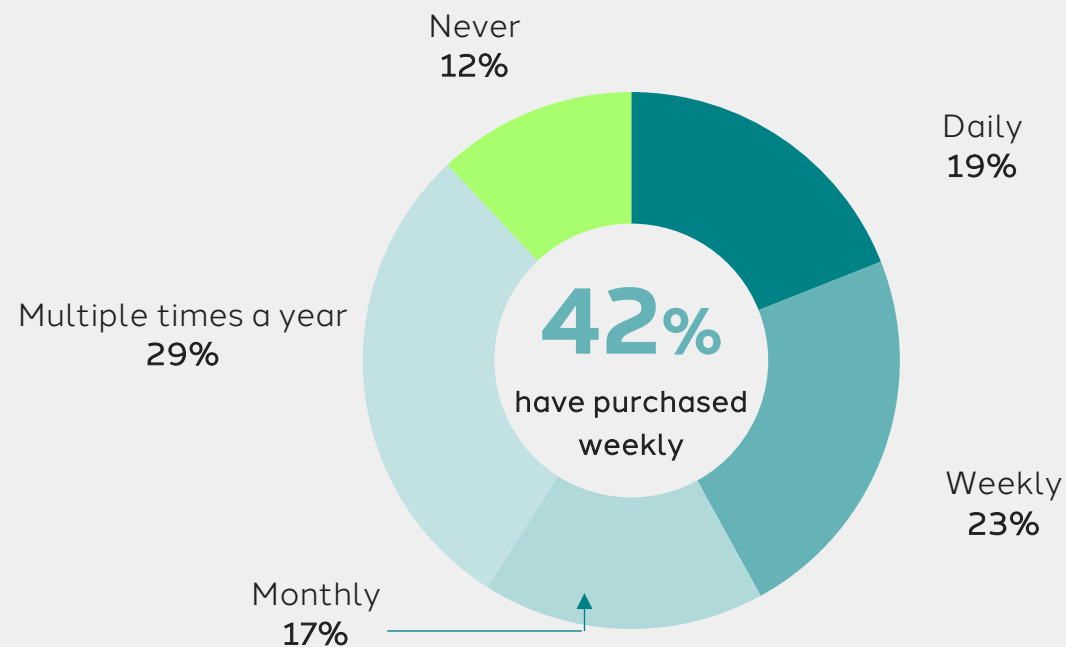
# INFLUENCERS' IMPACT ON PURCHASING DECISIONS



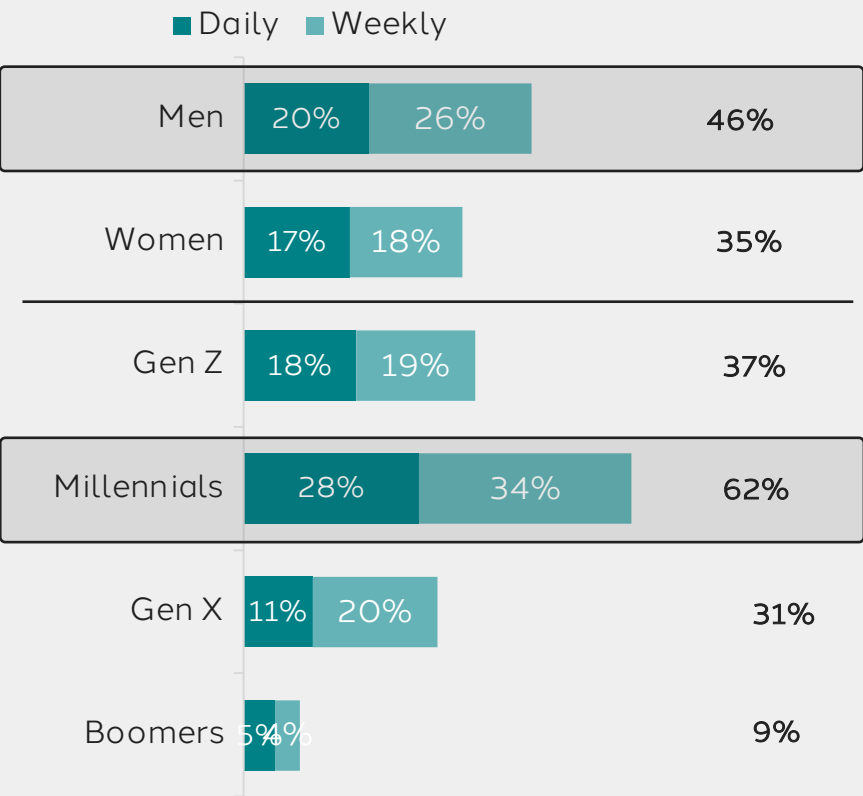
# ALMOST HALF OF CONSUMERS MAKE WEEKLY PURCHASES INSPIRED BY INFLUENCERS.

This behavior is driven by Men and especially by Millennials.

## HOW OFTEN HAVE YOU PURCHASED SOMETHING AFTER SEEING IT IN AN INFLUENCER'S CONTENT IN THE LAST YEAR?



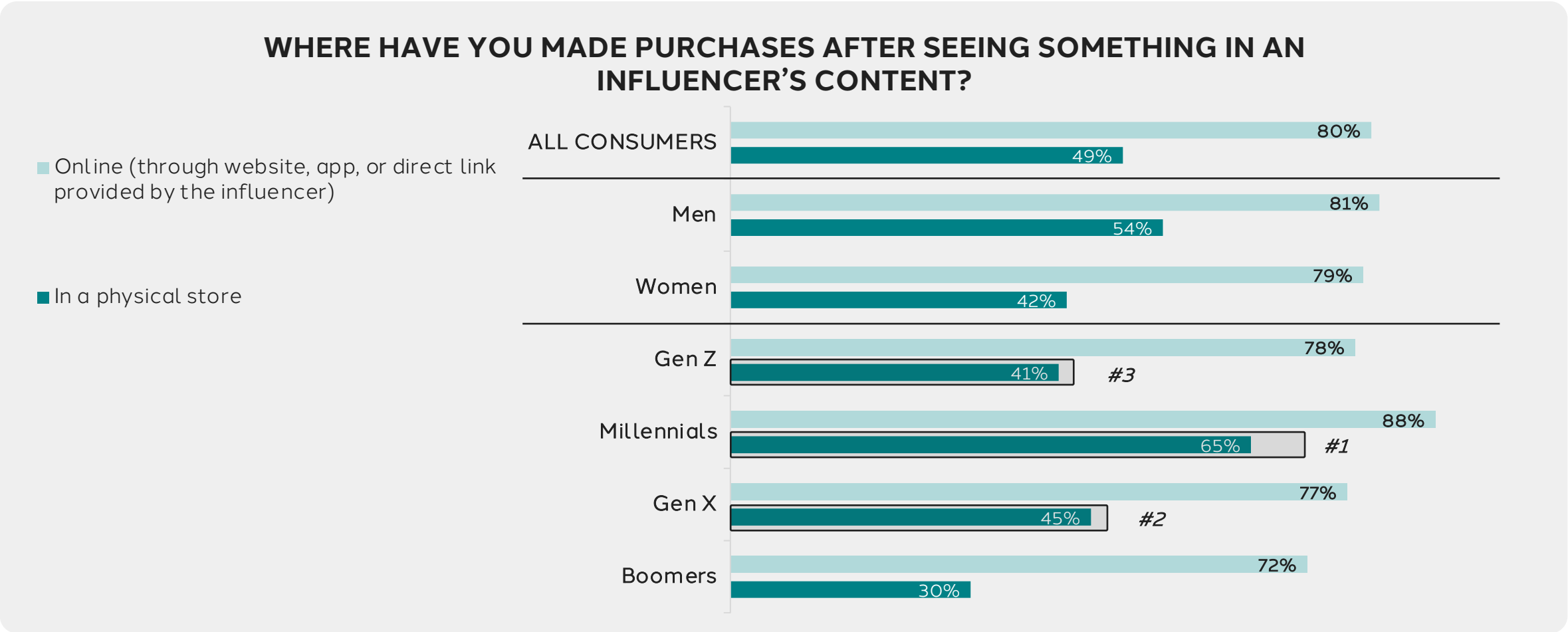
## “I HAVE PURCHASED AT LEAST WEEKLY”





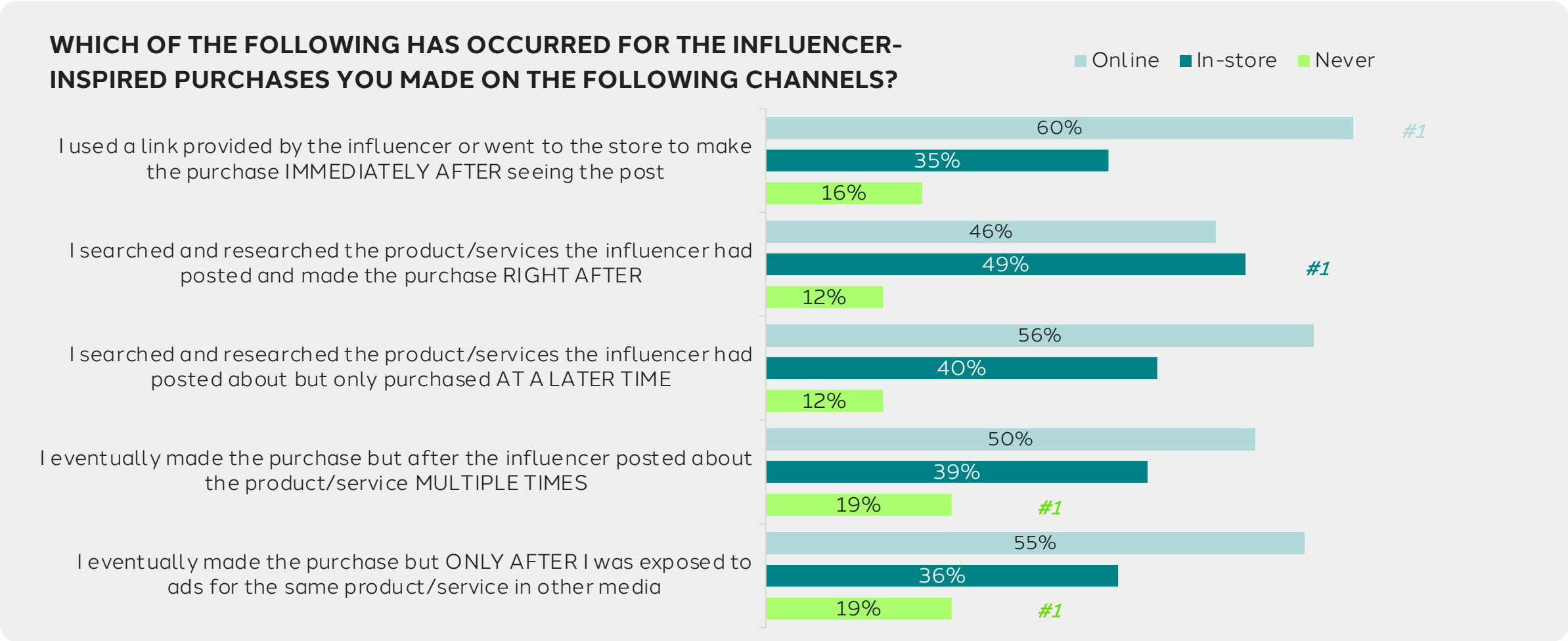
# ONLINE DOMINATES INFLUENCER-INSPIRED PURCHASES BUT IN-STORE STILL MATTERS.

Millennials are substantially more likely to have bought something inspired by an influencer in a physical store. Gen X are more likely to do so than Gen Zers.



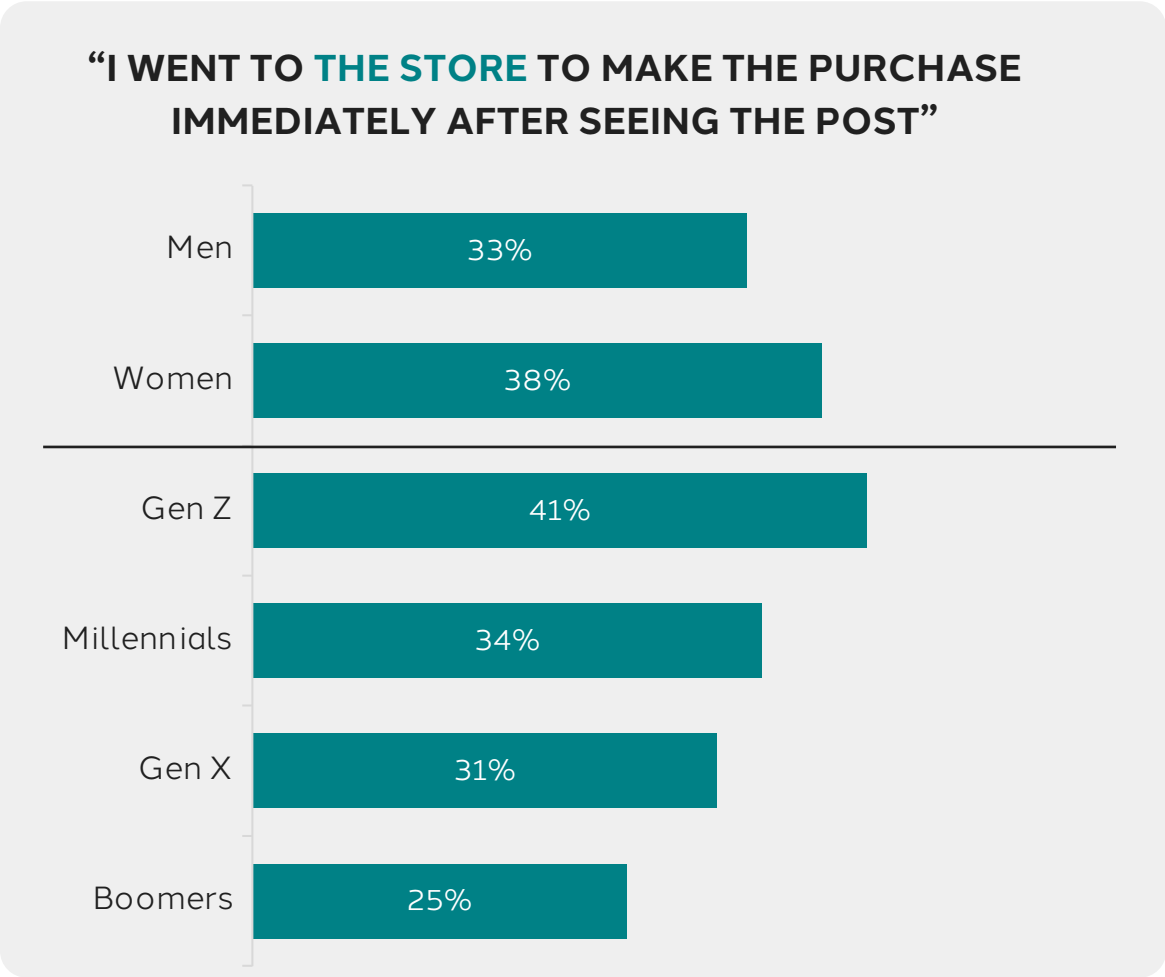
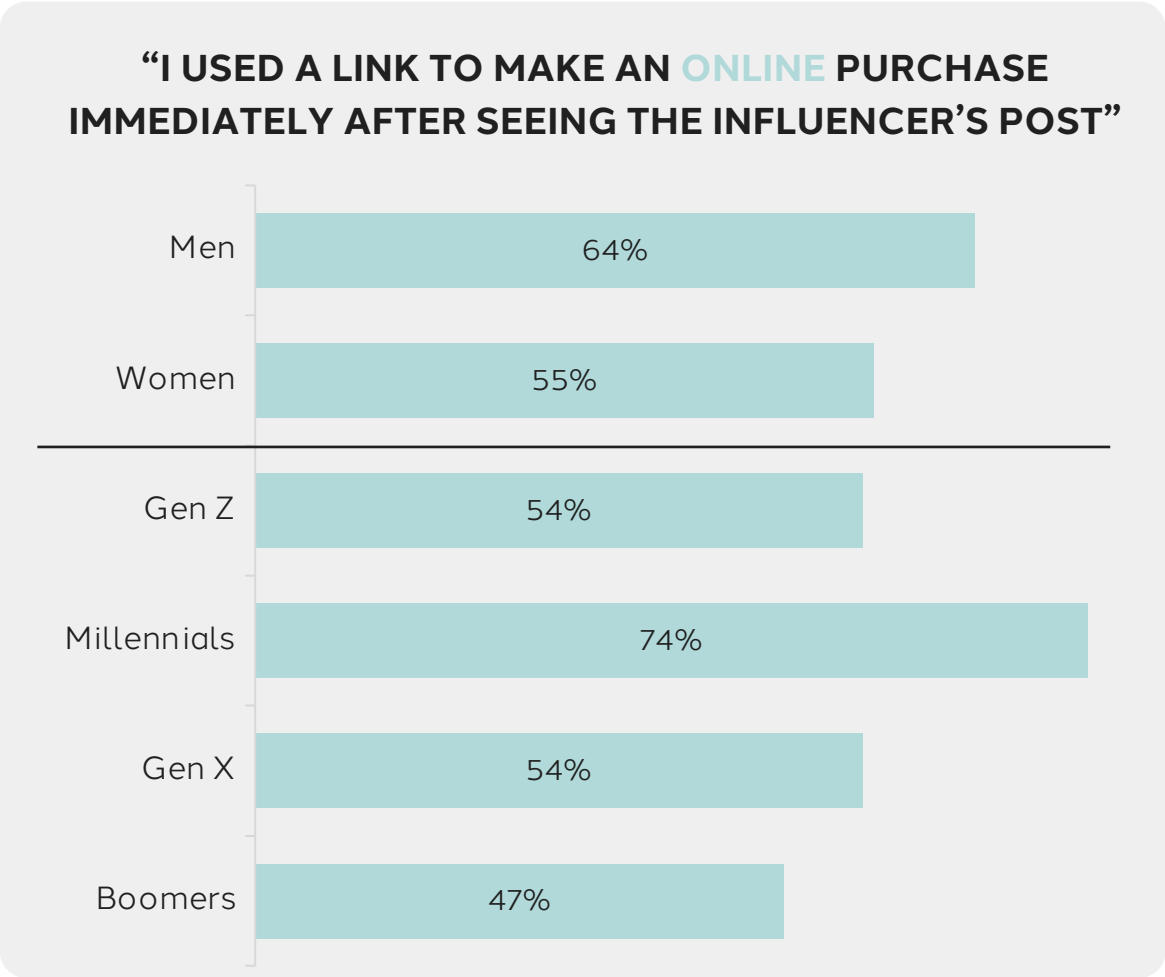
# ONLINE PURCHASES INSPIRED BY INFLUENCERS TEND TO BE IMPULSIVE, WHILE IN-STORE PURCHASES TAKE PLACE RIGHT AFTER SOME INITIAL RESEARCH.

More frequent exposure to the product/service does not necessarily translate into greater likelihood to purchase.



# INFLUENCER INSPIRE IMPULSE BUYING AND THE CHANNELS USED VARY BY COHORTS.

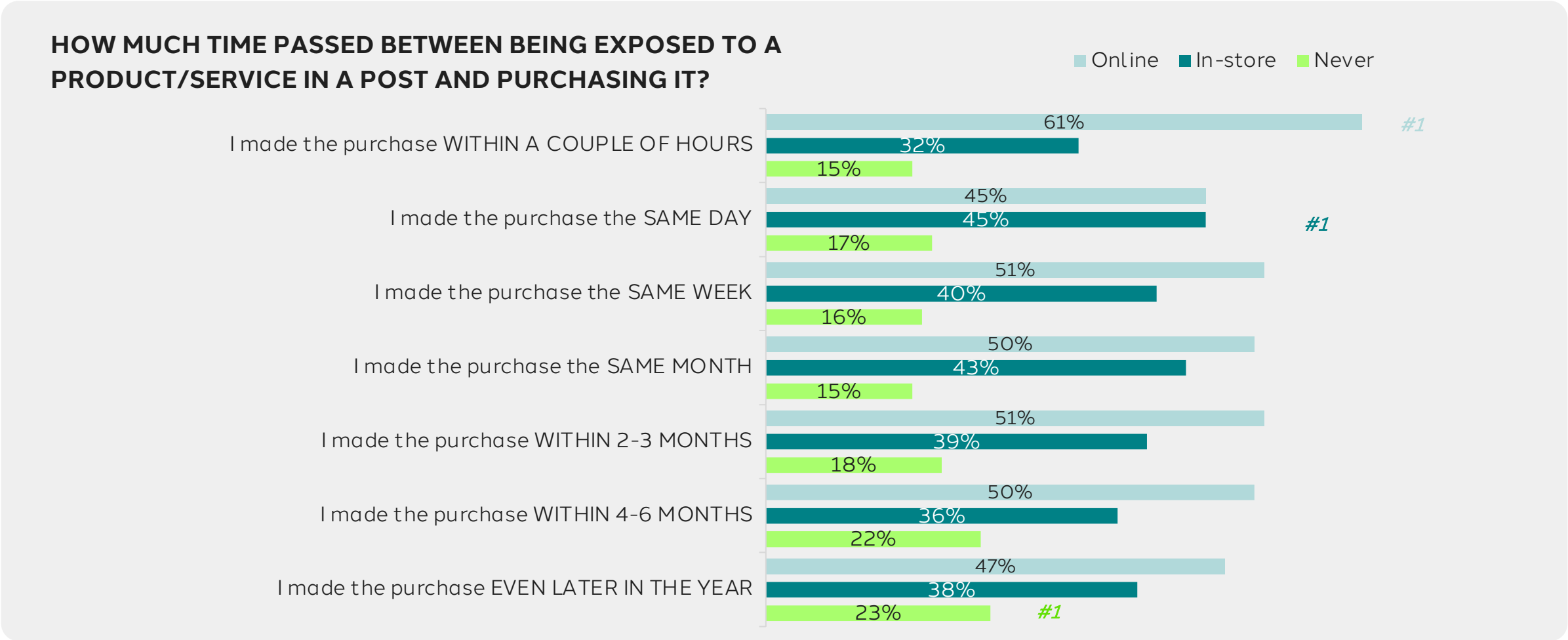
Men and Millennials are most likely to purchase immediately online, whereas Women and Gen Z are most likely to do so for in-store purchases.





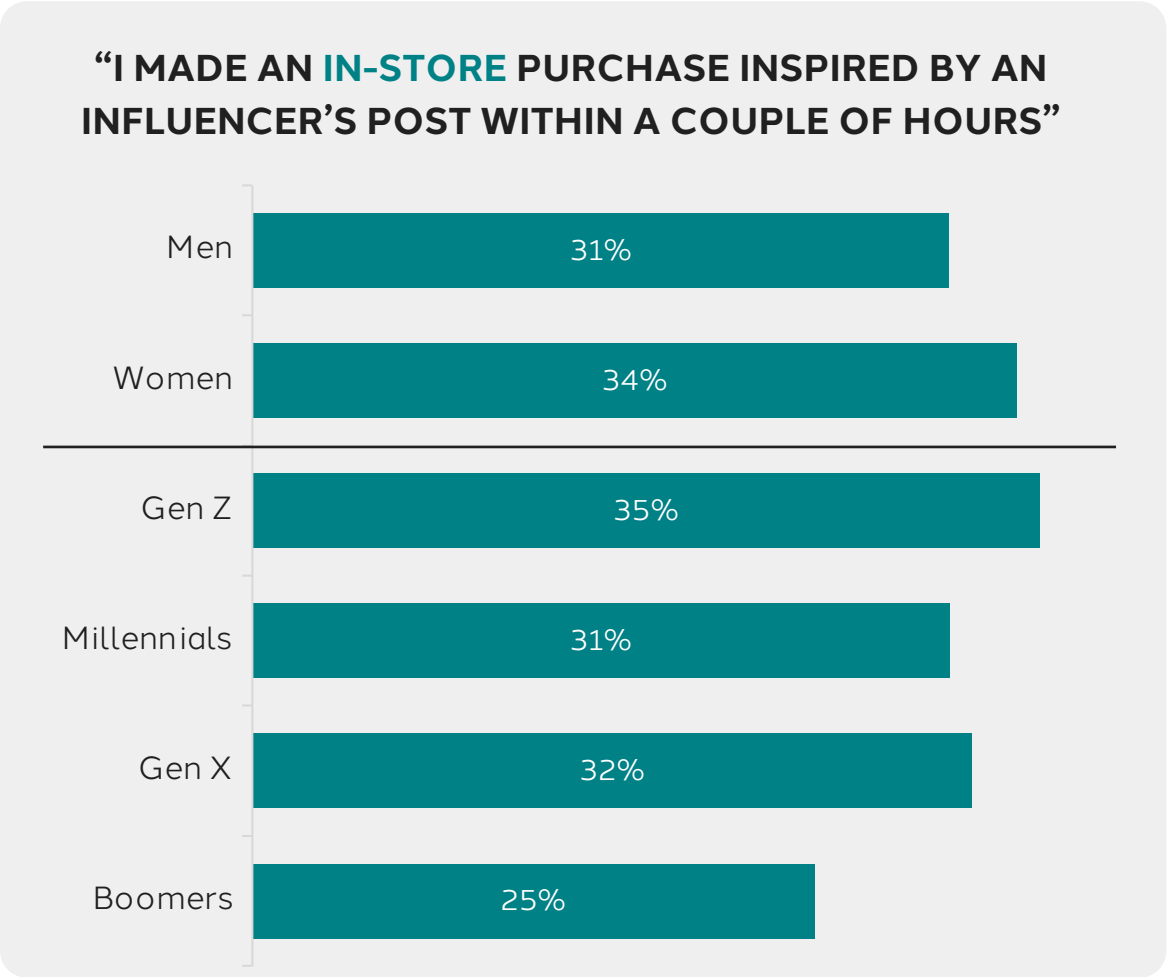
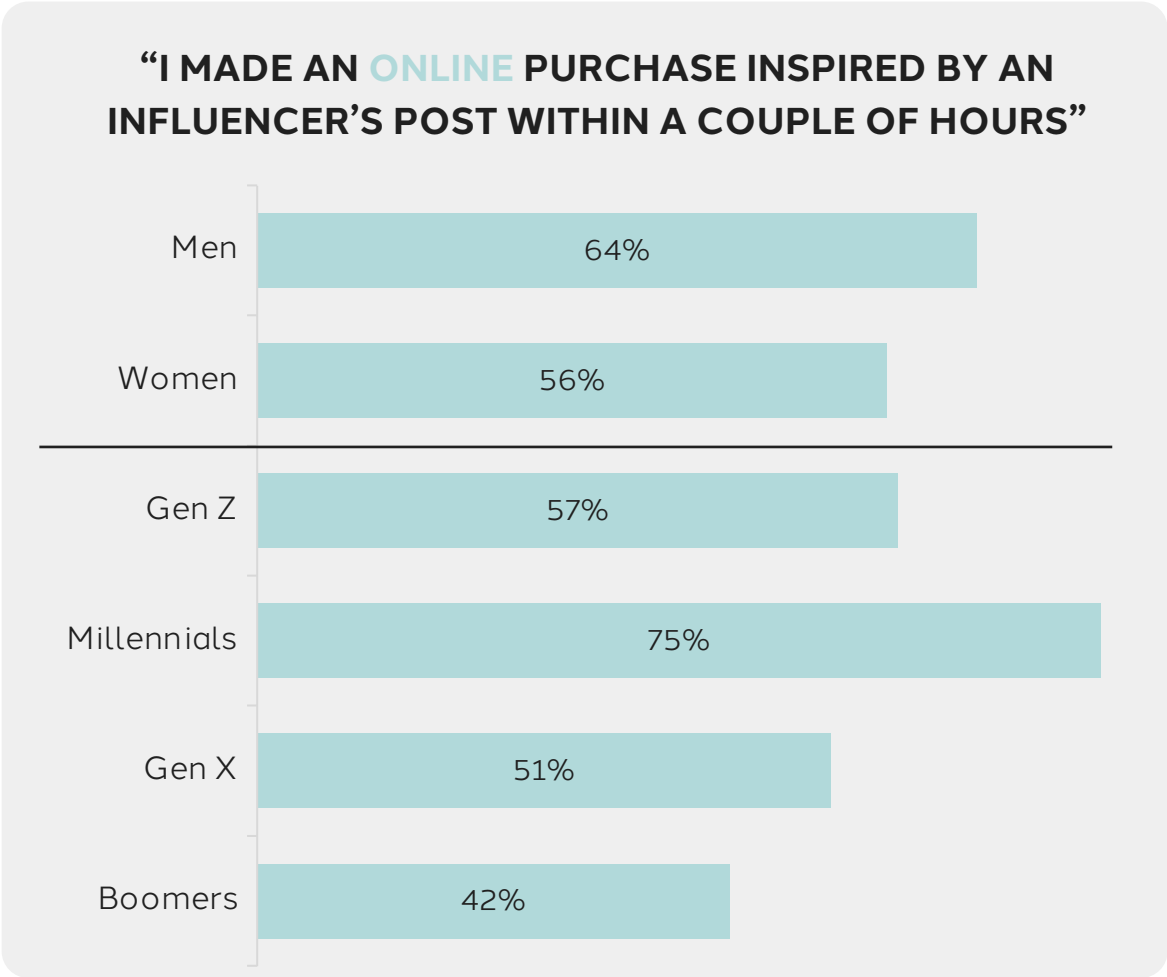
# INFLUENCER CONTENT DRIVES IMMEDIATE ONLINE PURCHASES, AND SAME-DAY IN-STORE DECISIONS.

The more time passes, the less likely purchases are inspired by influencers – or to be perceived as such by consumers.



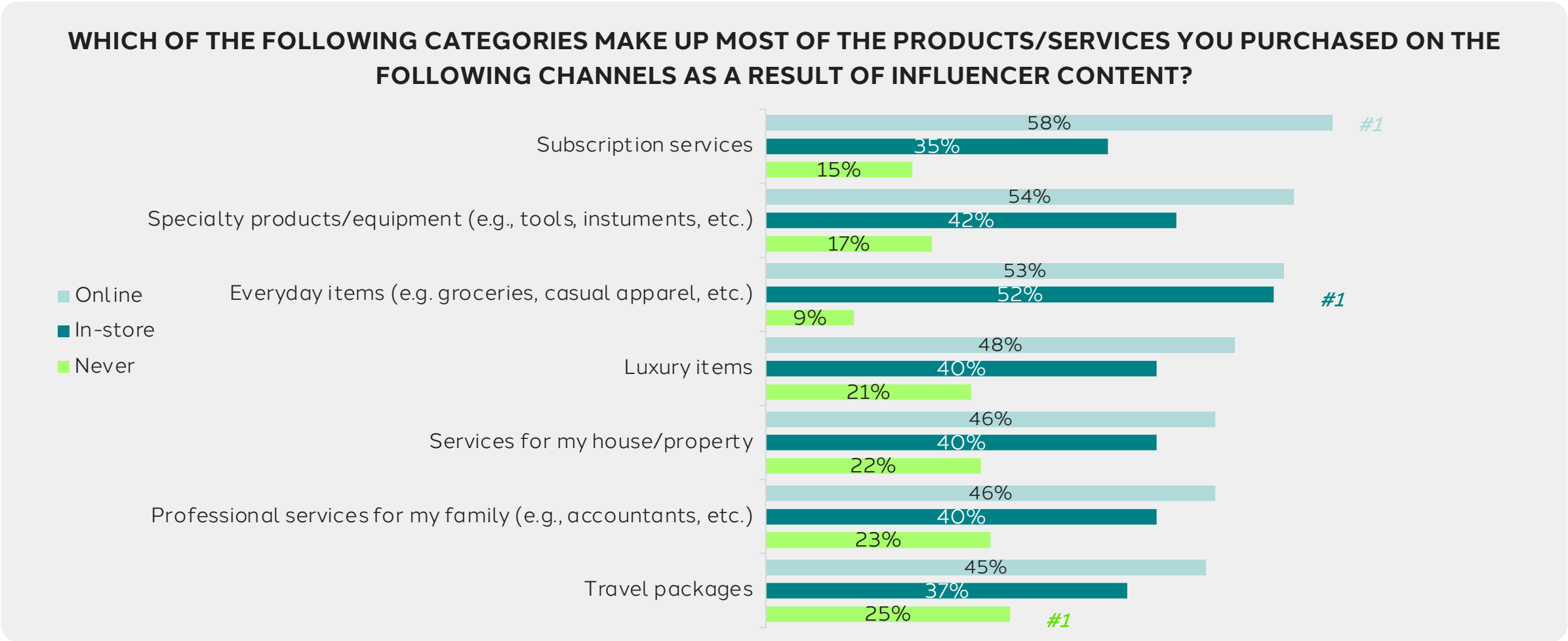
# WHEN IT COMES TO IMMEDIATE INFLUENCER-INSPIRED PURCHASES, MILLENNIALS CLEARLY FAVOR ONLINE, WHILE GEN Z ALSO LEAN ON PHYSICAL STORES.

Men are more likely to purchase within hours online, while Women are ahead for immediate in-store purchases.



# WHEN IT COMES TO ONLINE PURCHASES, INFLUENCER CONTENT IS BEST AT DRIVING SUBSCRIPTION ADOPTION AND THE SALE OF SPECIALTY PRODUCTS.

When it comes to in-store purchases, influencer content is best suited to driving the sale of everyday items (e.g., groceries, casual apparel, etc.)

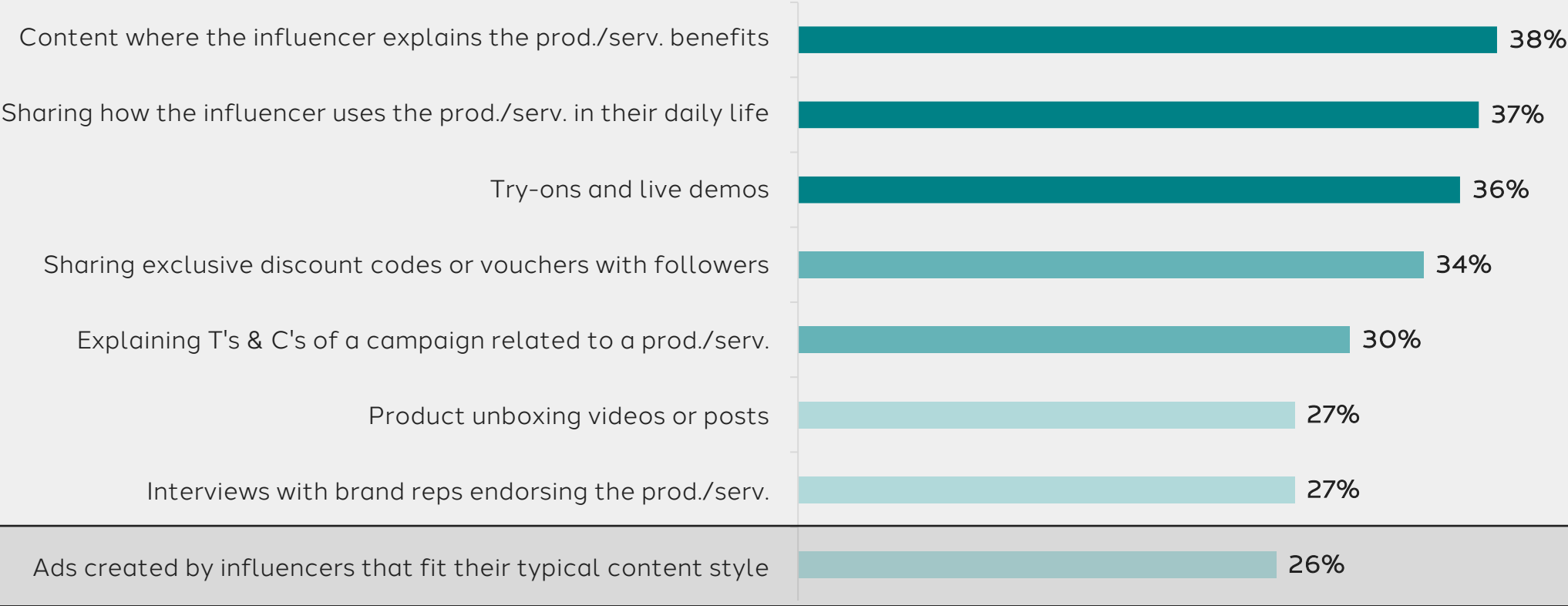




# CONVICTION OVER COUPONS: CONSUMERS WANT PROOF, NOT JUST PROMOS.

Even if they are made in an influencer’s signature content style, ads are deemed the least effective form of promotion.

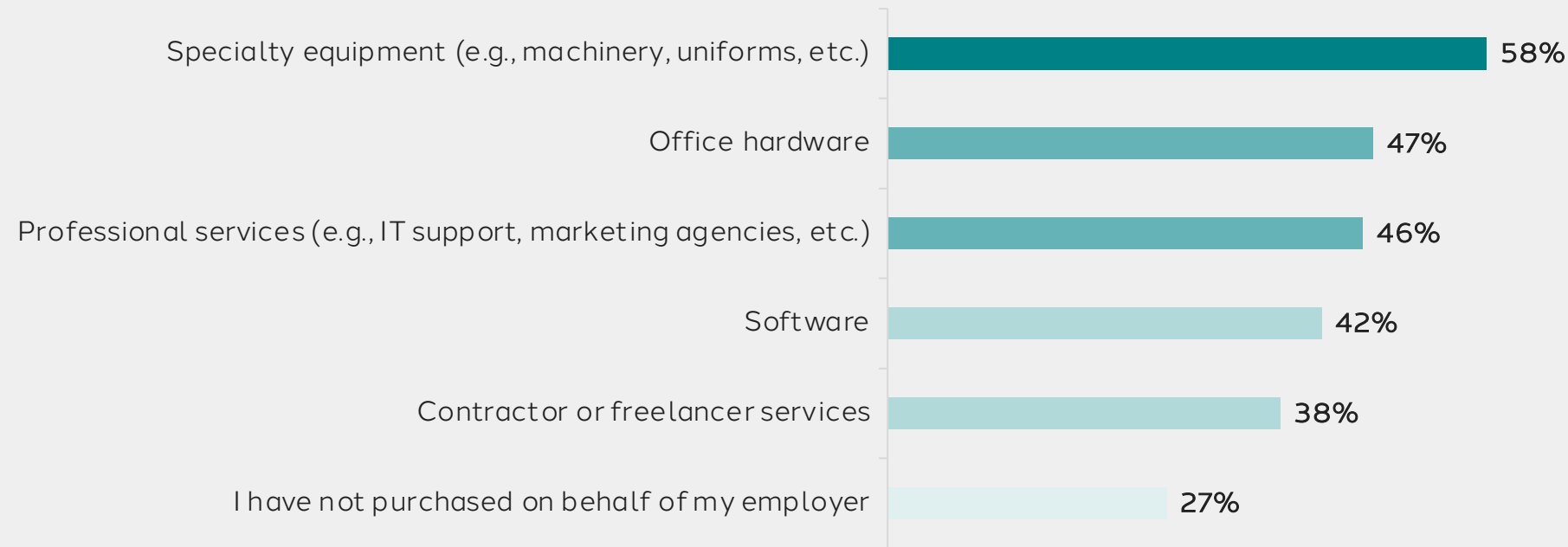
## WHICH OF THE FOLLOWING FORMS OF INFLUENCER CONTENT ARE MOST EFFECTIVE IN CONVINCING YOU TO MAKE A PURCHASE?



# IN A B2B CONTEXT, INFLUENCER POSTS ARE MORE EFFECTIVE IN INSPIRING PURCHASES FOR TANGIBLE GOODS.

Professional and contractor services, as well as software, are less likely to have been inspired by influencer posts compared to specialty equipment and hardware for the workplace.

WHICH OF THE FOLLOWING CATEGORIES HAVE YOU PURCHASED ON BEHALF OF YOUR EMPLOYER AS A RESULT OF ENGAGING WITH AN INFLUENCER’S POST? (\*)



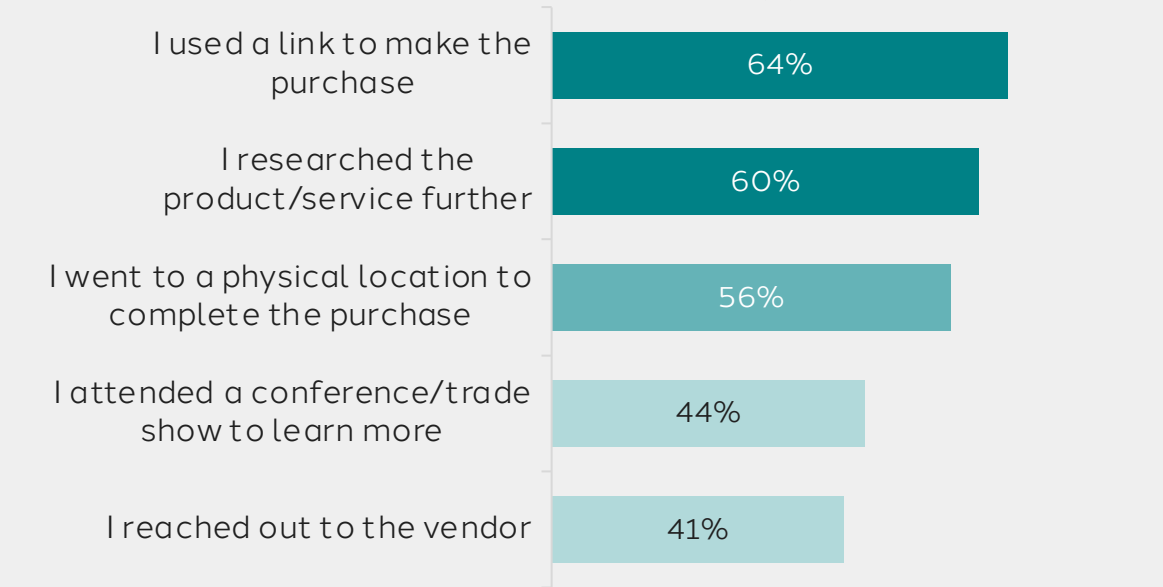
(\*) Only asked to respondents who said they follow influencers on matters related to their professional sphere and to make decisions at work.



# B2B INFLUENCERS CAN INSPIRE ACTIVE ENGAGEMENT FROM BUYERS THAT USUALLY RESOLVES IN WEEK-LONG CONSIDERATION CYCLES.

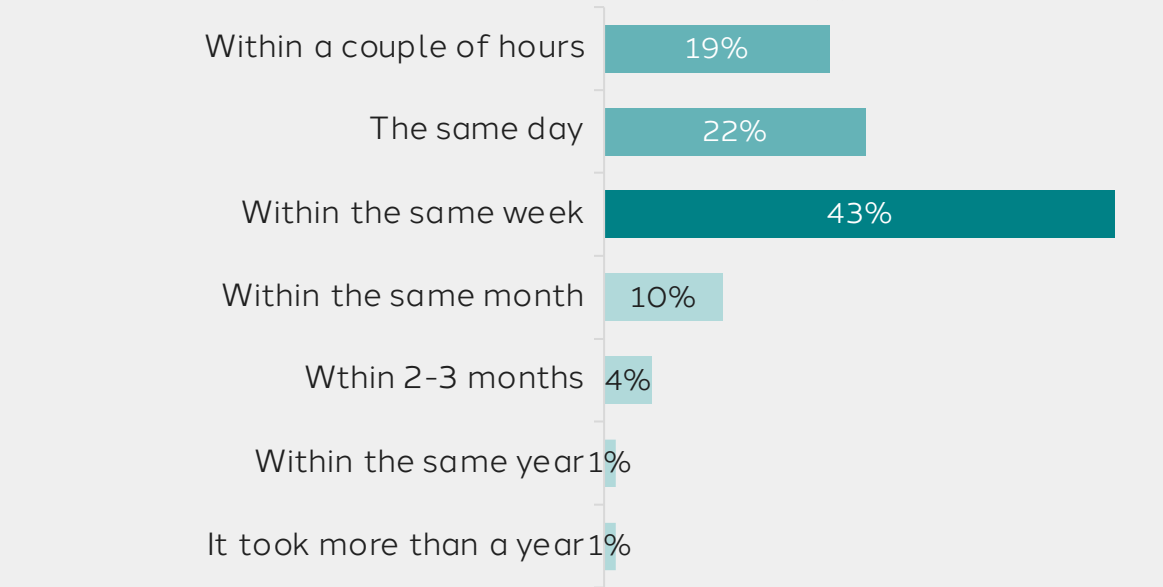
6 in 10 of those who have made influencer-inspired purchases on behalf of their employers report using a link to buy there and then. This is quite outstanding considering that typical B2B decision cycles can take 2-3 months or more.

## WHAT OCCURRED AFTER SEEING THE INFLUENCER’S POST FOR THE PURCHASES YOU MADE ON BEHALF OF YOUR EMPLOYER? (\*)



(\*) Only asked to respondents who said they made an influencer-inspired purchase on behalf of their employer.

## WHEN DID THE PURCHASE ON BEHALF OF YOUR EMPLOYER OCCUR IN RELATION TO WHEN YOU SAW THE INFLUENCER’S POST? (\*)



(\*) Only asked to respondents who said they made an influencer-inspired purchase on behalf of their employer.



# IMPLICATIONS FOR MARKETERS

## BASE YOUR FUNNEL EXPECTATIONS ON CHANNEL AND CATEGORY NUANCES.

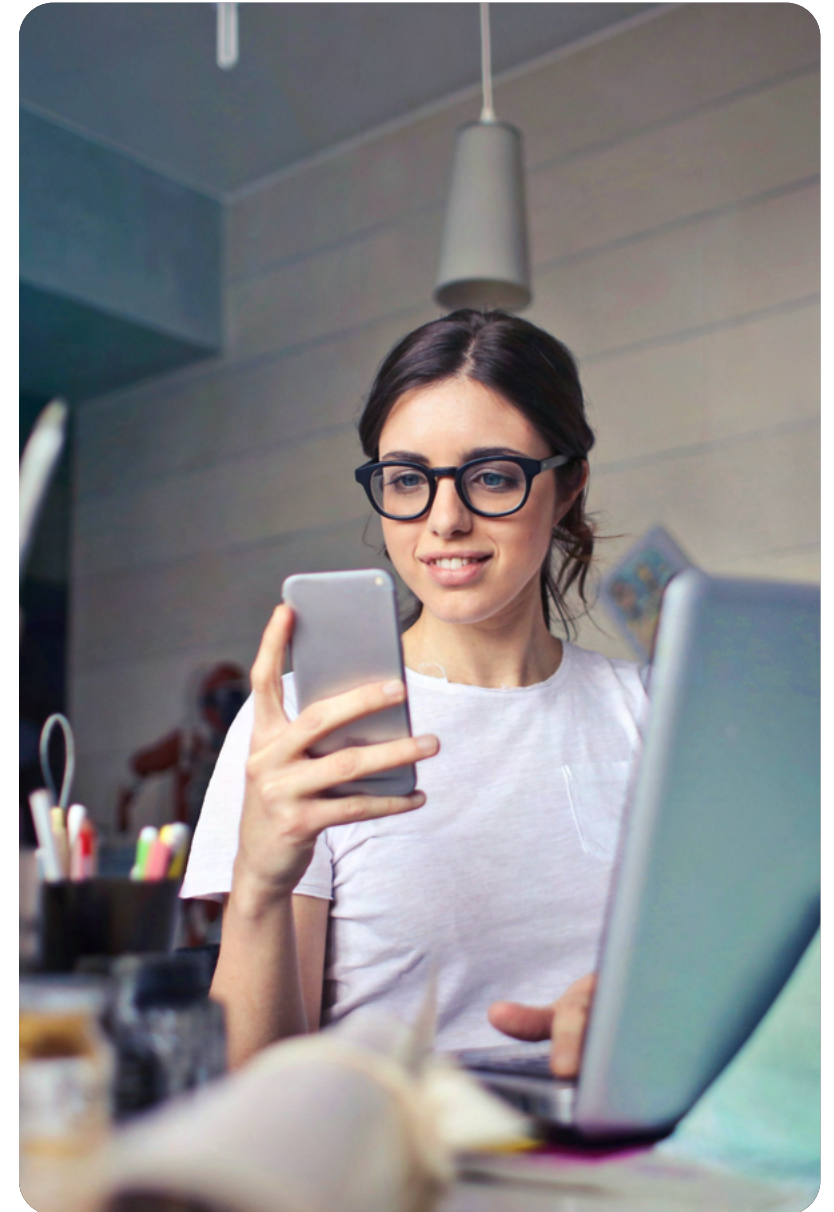
Influencer-inspired purchases tend to be impulsive and immediate for products and services (e.g., subscriptions) that are purchased online, while the purchase of physical products in-store may require repeat and prolonged exposure on the part of the consumer. Model the KPIs for your influencer campaign on the nuances of what is being sold and where.

## DESIGN CUSTOMER JOURNEYS THAT CATER TO EACH COHORT'S PREFERENCES.

The next best action after the consumer has engaged with the influencer's post may vary according to whether you are targeting Millennials, who want to immediately move to a checkout page, or Gen Zers, who appreciate the opportunity of checking out the product in the flesh, in a physical retail environment. Even for D-T-C brands, consider whether there are pop-up opportunities, perhaps involving the influencers themselves, that might make sense.

## THINK LIKE A LIFESTYLE BRAND.

Regardless of the category your products/services inhabit, sponsored content by influencers resonates the most with consumers when they are shown the creators standing up for the product/service's benefits and using the brand in real life. How can what you are promoting fit within a lifestyle narrative, so the connection point between the content featured by influencers and other ads promoting the same product or service feels more organic.





# DISCOVERING INFLUENCERS AND THEIR CONTENT

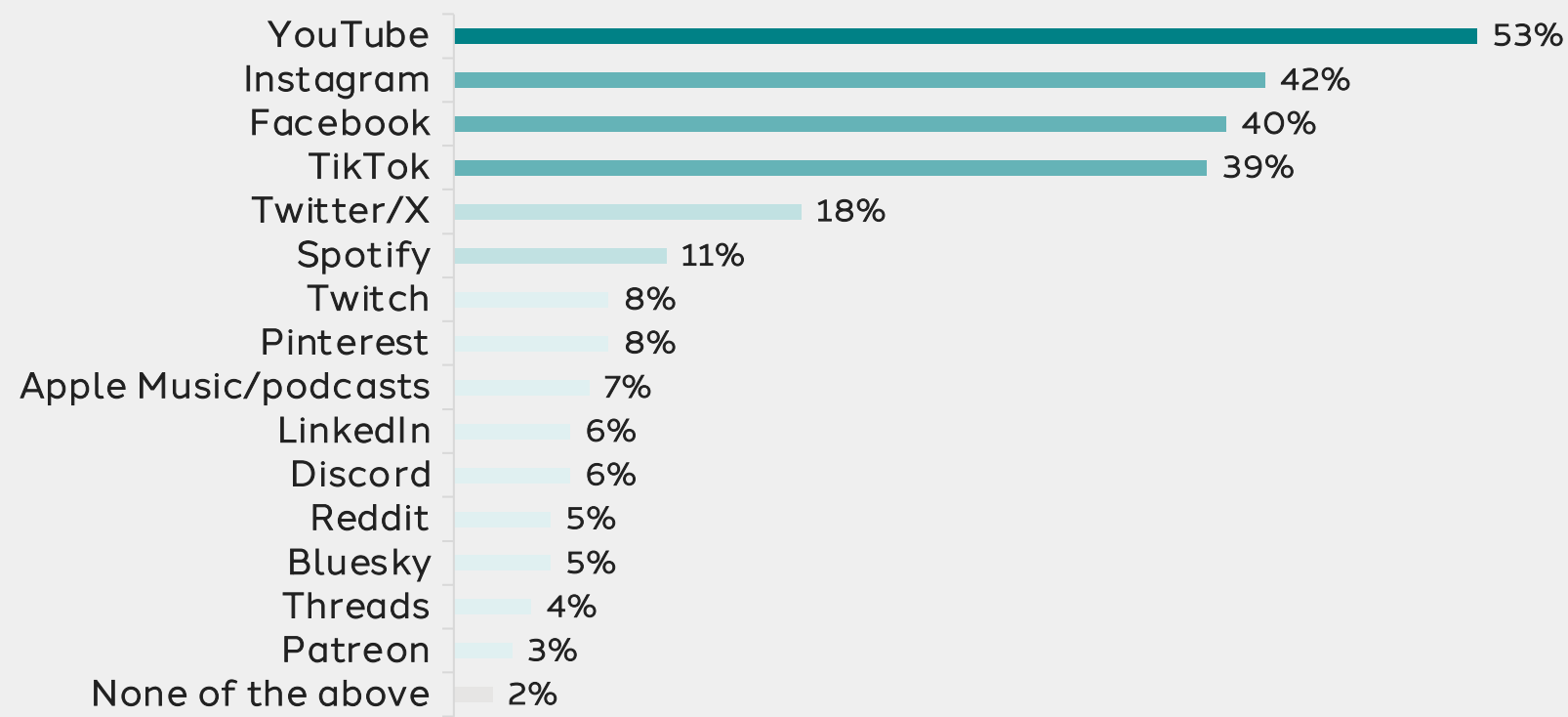




# YOUTUBE IS CONSUMERS’ FAVORITE PLATFORM WHEN IT COMES TO DISCOVERING NEW INFLUENCERS TO ENGAGE WITH.

Instagram, Facebook, and TikTok are also widely used for discovery.

ON WHICH OF THE FOLLOWING PLATFORMS DO YOU LEARN ABOUT NEW INFLUENCERS / CONTENT CREATORS TO FOLLOW?



# PLATFORMS FOR INFLUENCER DISCOVERY VARY RADICALLY ACCORDING TO GENDER AND GENERATION.

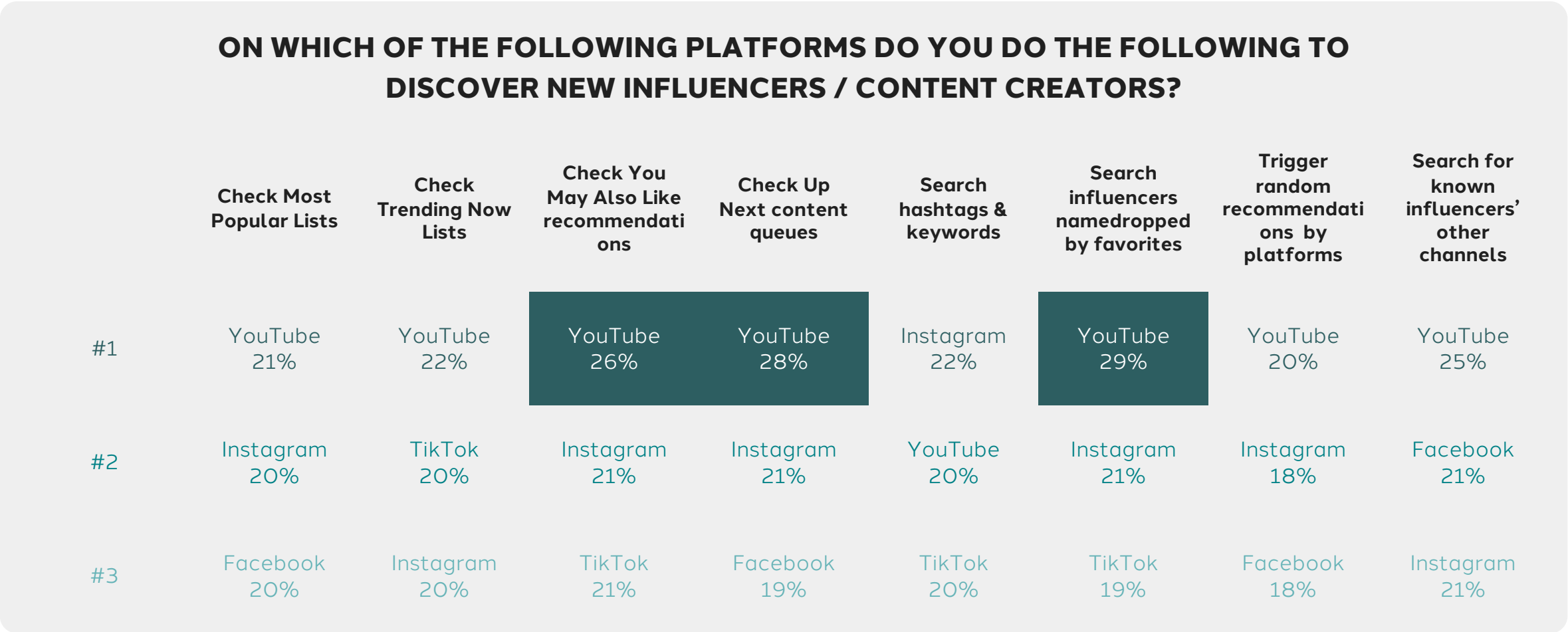
Gen Z over-significantly on using Twitch, Apple, and Discord, whereas Boomers favor LinkedIn and Facebook.

ON WHICH OF THE FOLLOWING PLATFORMS DO YOU LEARN ABOUT NEW INFLUENCERS / CONTENT CREATORS TO FOLLOW?					
MEN	WOMEN	GEN Z	MILLENNIALS	GEN X	BOOMERS
Reddit (120i)	Pinterest (125i)	Twitch (175i)	Twitter/X (122i)	Facebook (130i)	LinkedIn (150i)
Spotify (118i)	TikTok (115i)	Apple Music (157i)	Reddit (120i)	LinkedIn (116i)	Facebook (142i)
LinkedIn (116i)	Apple Music (114i)	Discord (150i)	Facebook (120i)	YouTube (111i)	Pinterest (137i)



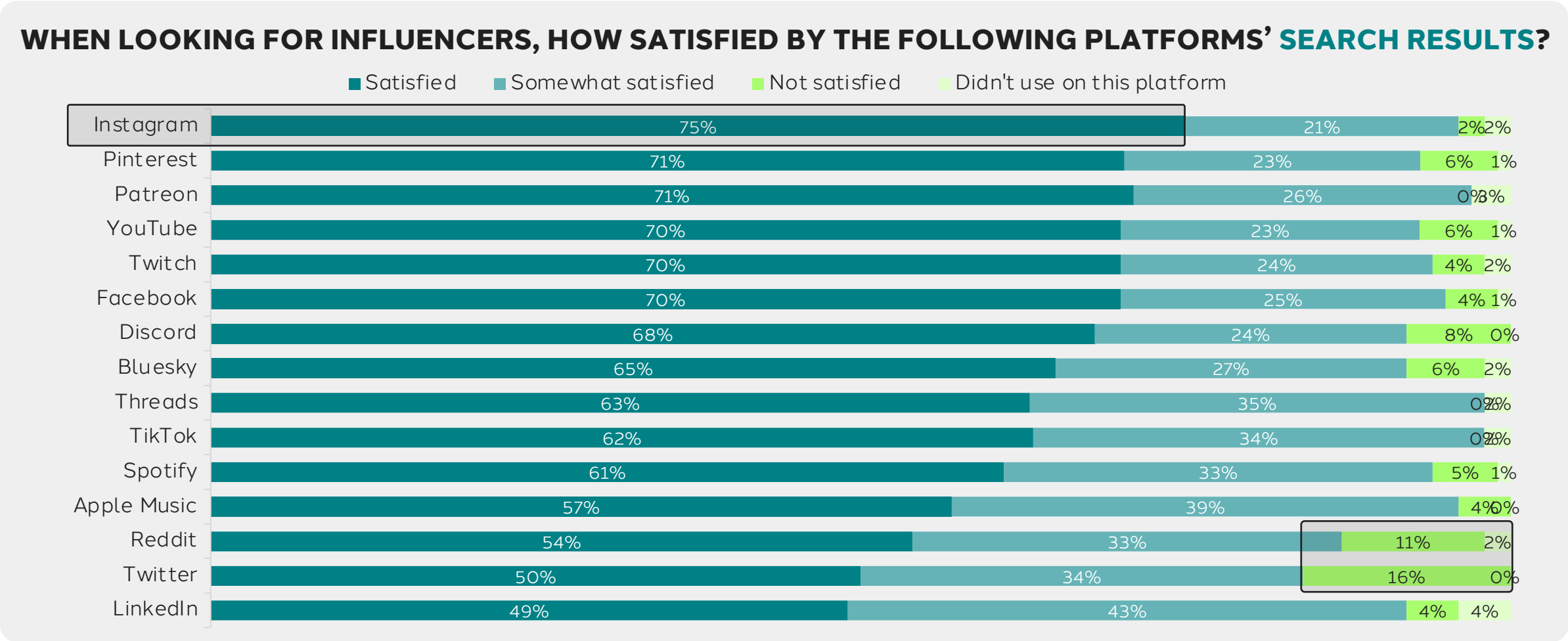
# YOUTUBE’S ALGORITHM INFORMS THE MAJORITY OF NEW INFLUENCER DISCOVERIES, WHILE INSTAGRAM IS FAVORED FOR HASHTAG SEARCHES.

YouTube is also where most consumers search for influencers who have been recommended by creators they already trust.



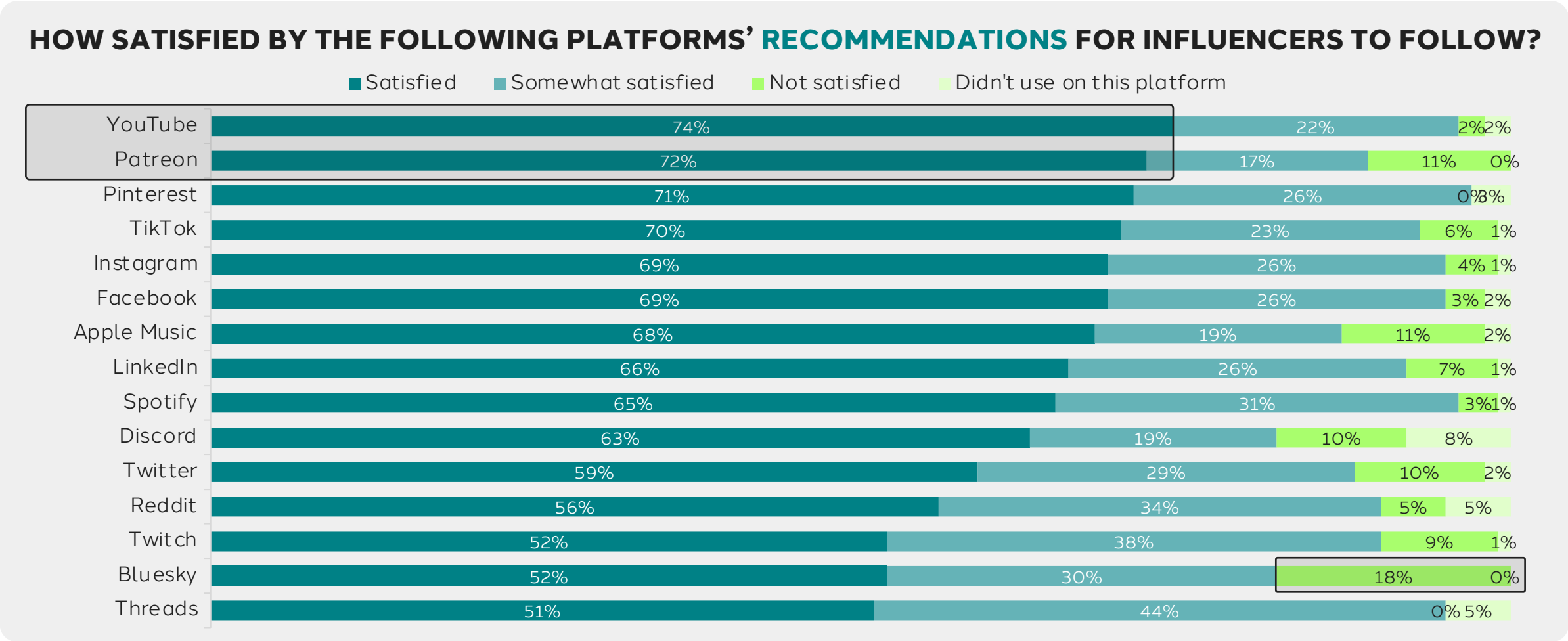
# INSTAGRAM’S SEARCH IS CONSIDERED THE BEST BY CONSUMERS.

Conversely, Twitter/X and Reddit are considered to have the least satisfactory search capabilities.



# YOUTUBE AND PATREON’S ALGORITHMS ARE CONSIDERED TO BE THE MOST EFFECTIVE IN MAKING INFLUENCER RECOMMENDATIONS.

On the other hand, consumers are dissatisfied with the recommendations on Bluesky.

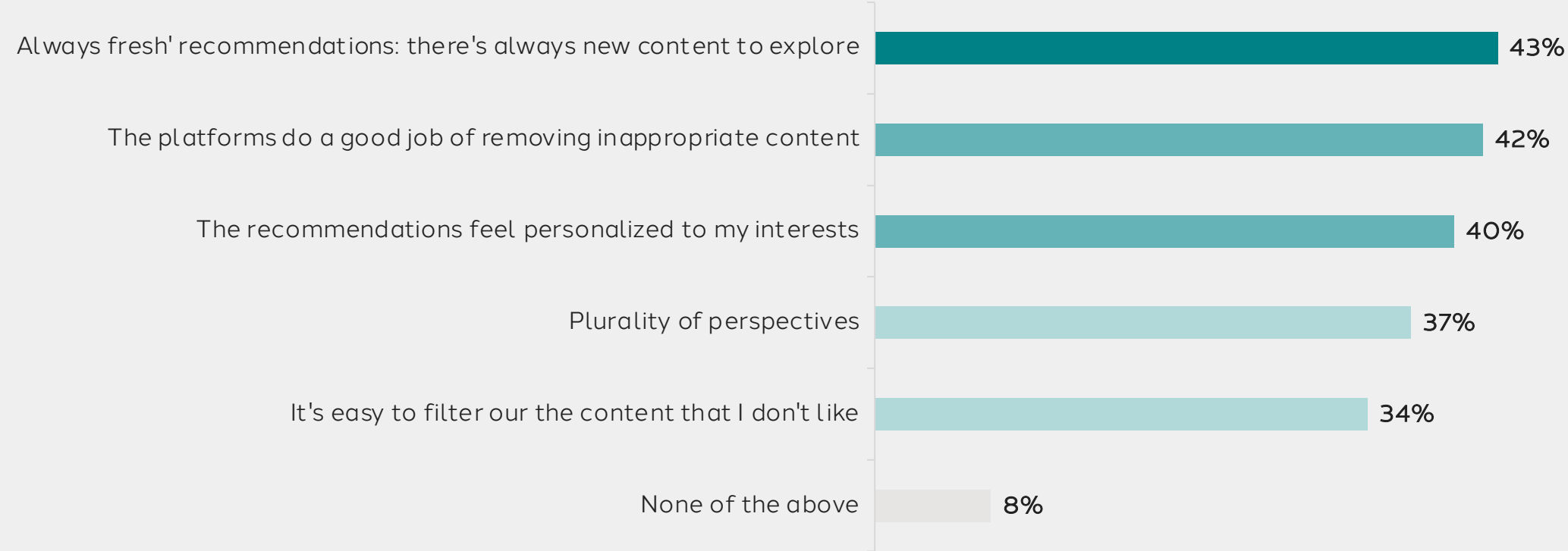




# CONSUMERS APPRECIATE THE VARIETY OF CONTENT RECOMMENDATION PLATFORMS PROVIDE TO THEM.

They also feel platforms are effective in removing inappropriate content and delivering personalization.

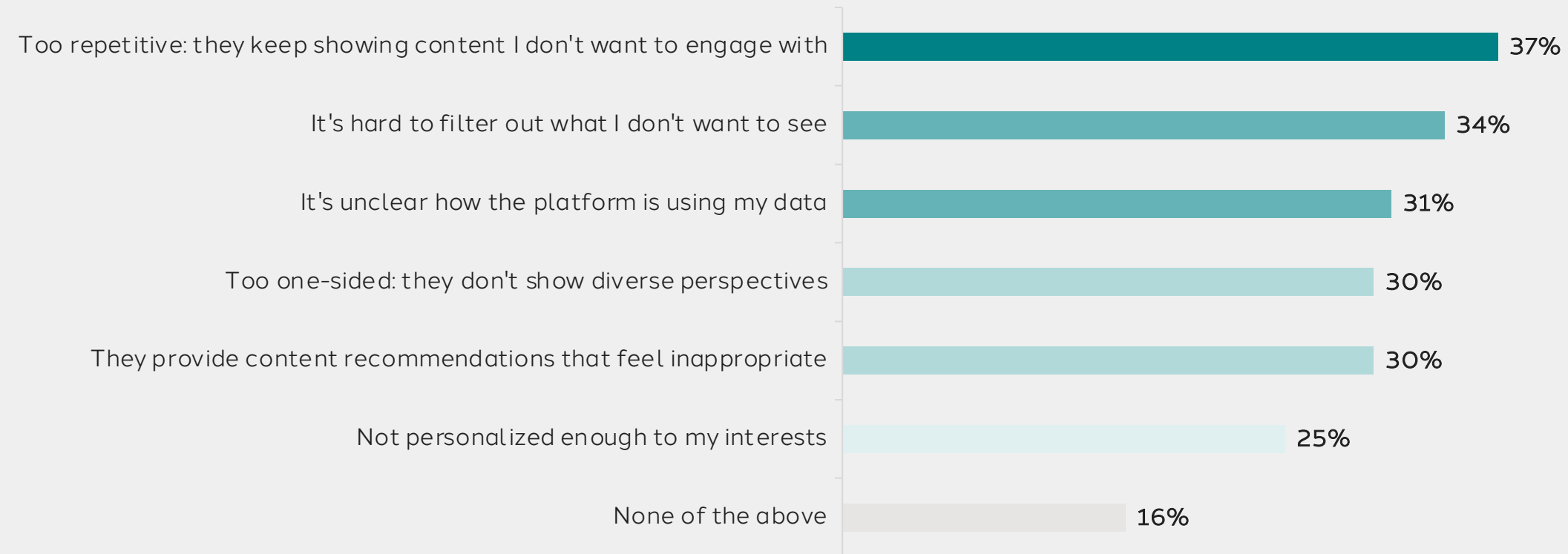
## WHAT, IF ANYTHING, DO YOU LIKE ABOUT HOW PLATFORMS MAKE RECOMMENDATIONS FOR NEW INFLUENCERS TO FOLLOW?



# ON THE FLIP SIDE, THOSE WHO ARE DISSATISFIED LAMENT EXCESSIVE REPETITION IN RECOMMENDATIONS AND HOW HARD IT IS TO FILTER OUR DISLIKED CONTENT.

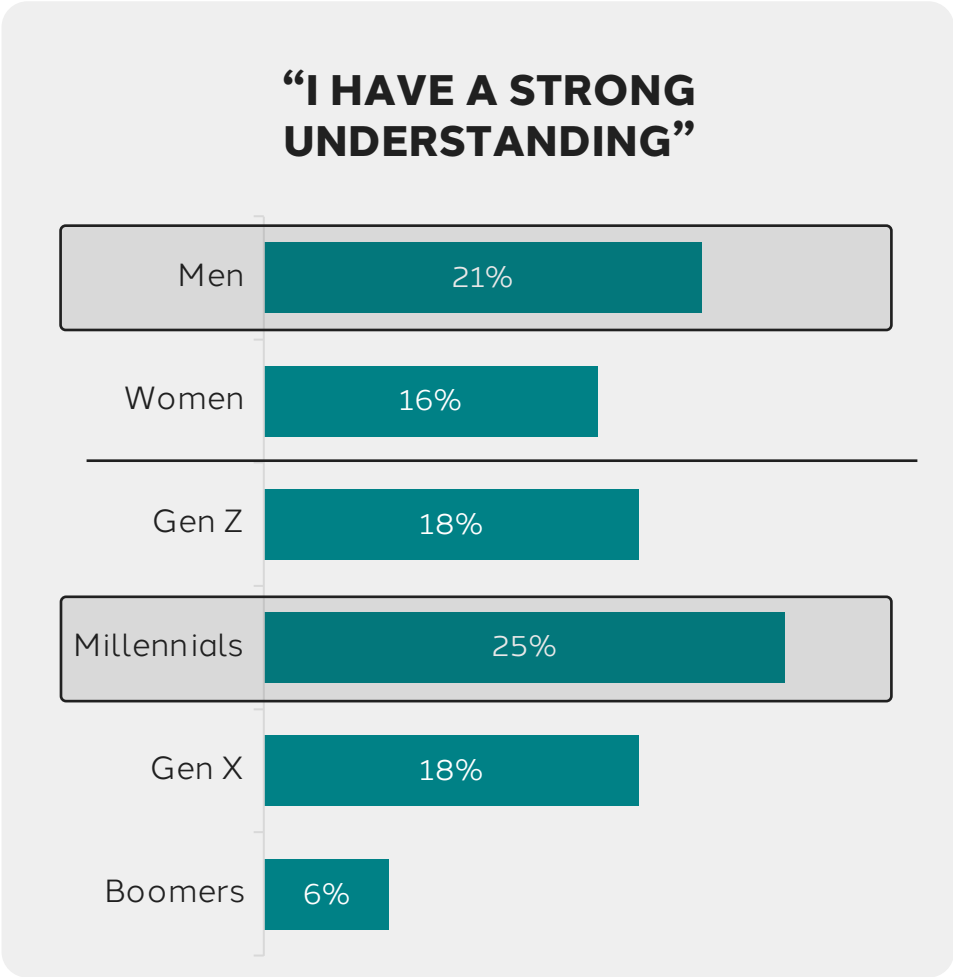
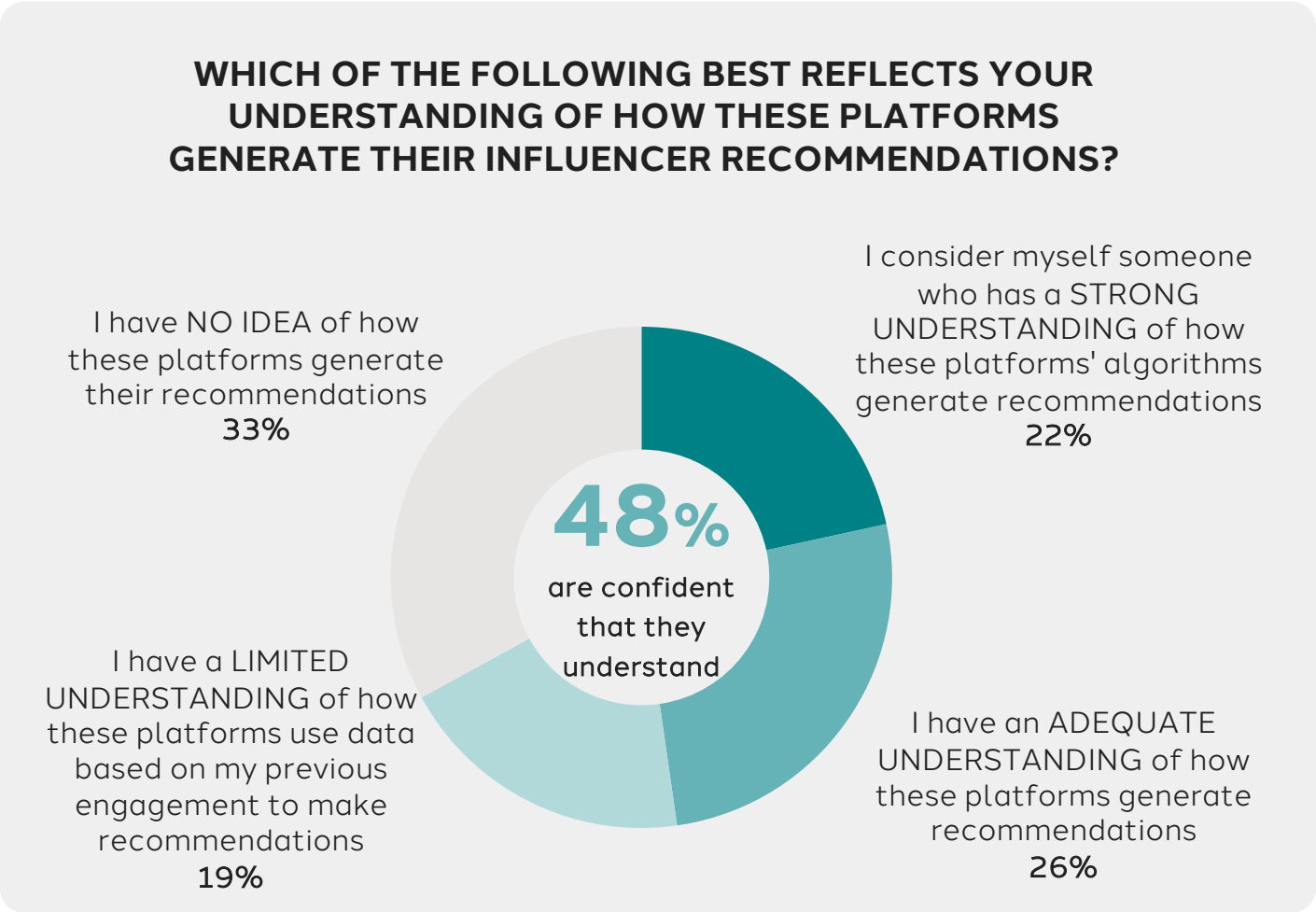
Lack of transparency around data usage is also a considerable concern.

## WHAT, IF ANYTHING, FRUSTRATES YOU ABOUT HOW PLATFORMS MAKE RECOMMENDATIONS FOR NEW INFLUENCERS TO FOLLOW?



# HALF OF CONSUMERS ARE CONFIDENT IN THEIR UNDERSTANDING OF HOW PLATFORMS GENERATE INFLUENCER RECOMMENDATIONS.

This behavior is driven by Men and especially by Millennials.



# IMPLICATIONS FOR MARKETERS

## WEIGH CONVERSATIONAL VS. REFERRAL APPROACHES.

Some platforms are favored for their hashtag and keyword search capabilities and are therefore better suited to campaigns where a brand may leverage influencer content to respond to trends in culture, whereas on others, consumers expect influencers to name-drop other creators. Consider what is the type of ‘word of mouth’ that is best suited for the campaign you are planning to inform your media investment structure.

## KEEP UP THE PERSONALIZATION BAR IN THE SHIFT FROM INSPIRATION TO COMMERCE.

Consumers feel that the platforms on which they engage with influencer content are very good at providing personalized recommendations. There is the risk that consumer will disengage and abandon the site/cart, if the customer experiences that are inspired by influencer recommendations are not equally personalized.

## HOW CAN YOU BE CREATIVE, LEVERAGING CONSUMERS’ UNDERSTANDING OF ALGORITHMS?

As consumers engage with their favorite creators across multiple platforms and claim to understand how content recommendations are generated, consider if there are ‘treasure hunt’ gamification opportunities you can embed in your campaign. Remember [this one](#) by Samsung?



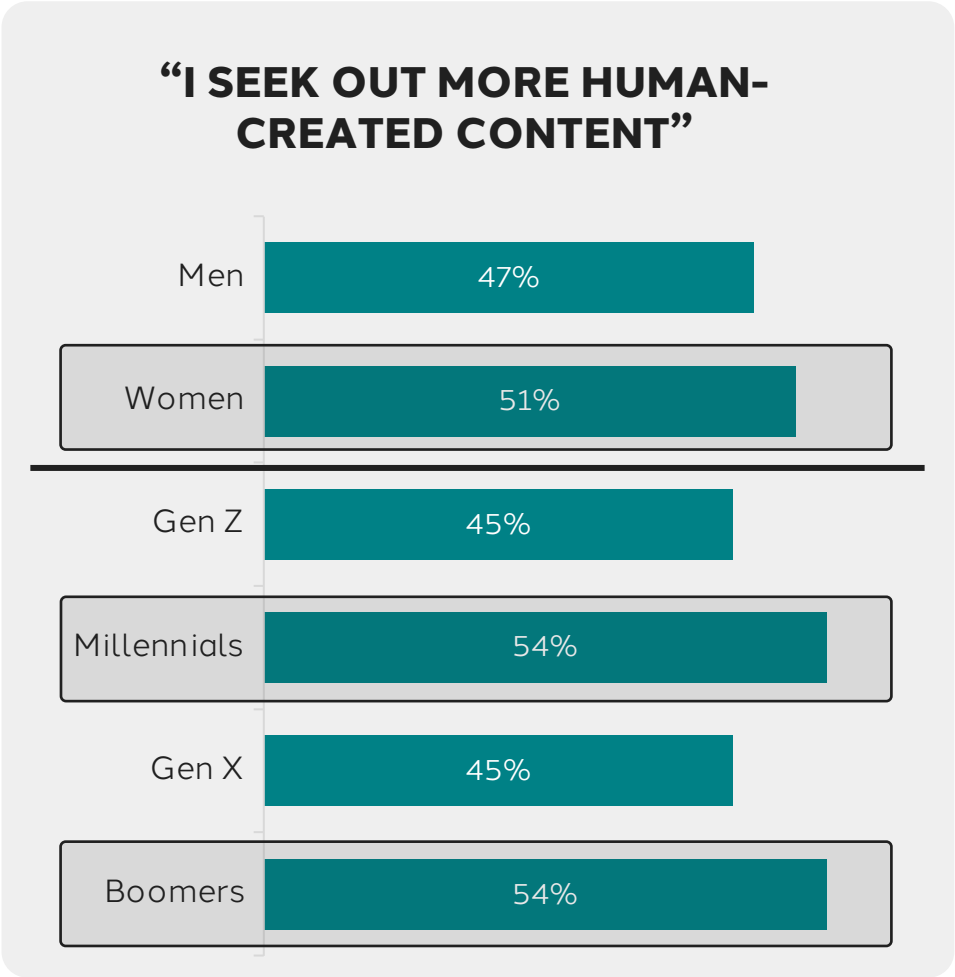
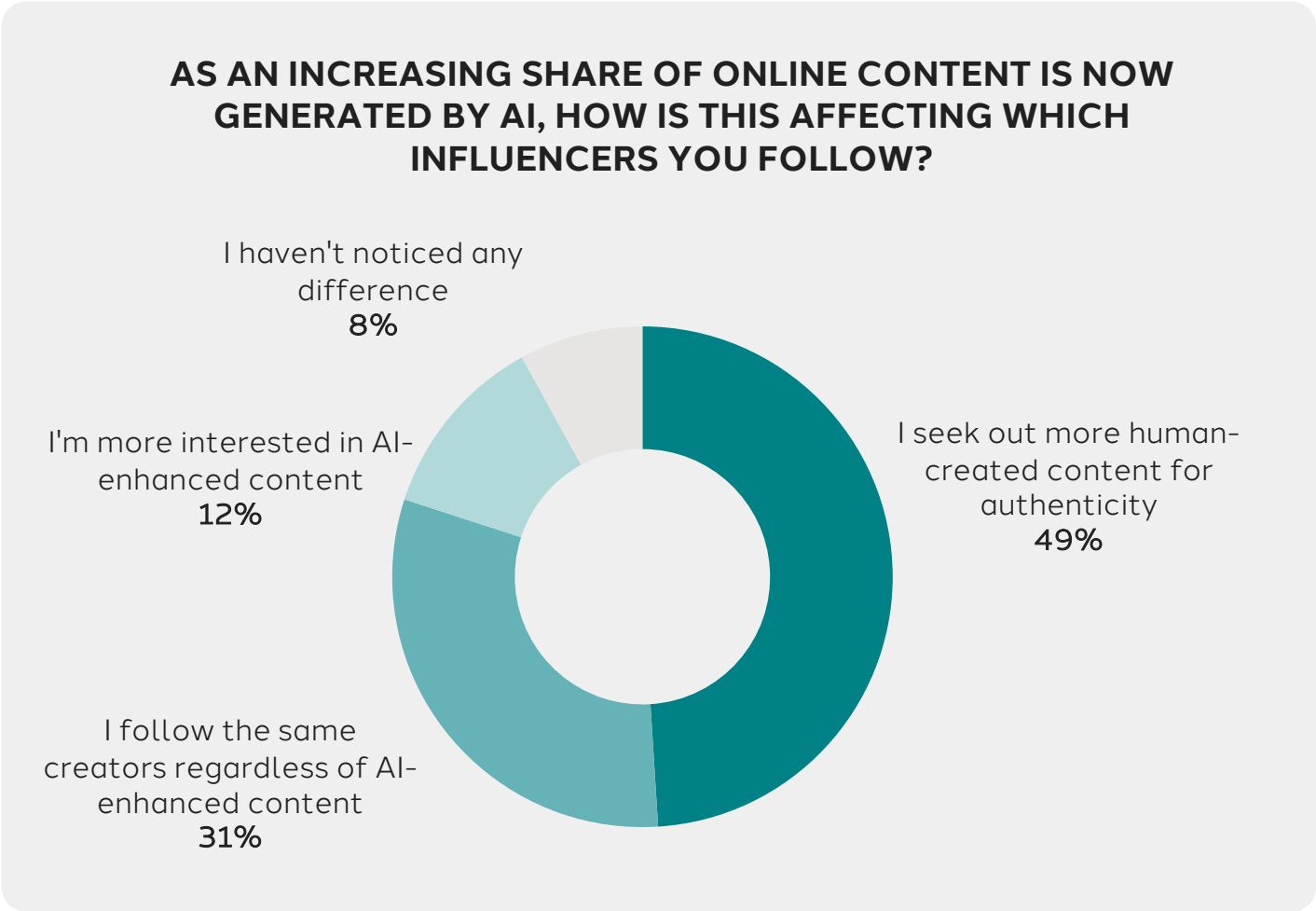


# HOW AI IS TRANSFORMING THE INFLUENCER LANDSCAPE



# THE PROLIFERATION OF AI CONTENT IS DRIVING HALF OF CONSUMERS TO SEEK MORE HUMAN-MADE INFLUENCER CONTENT.

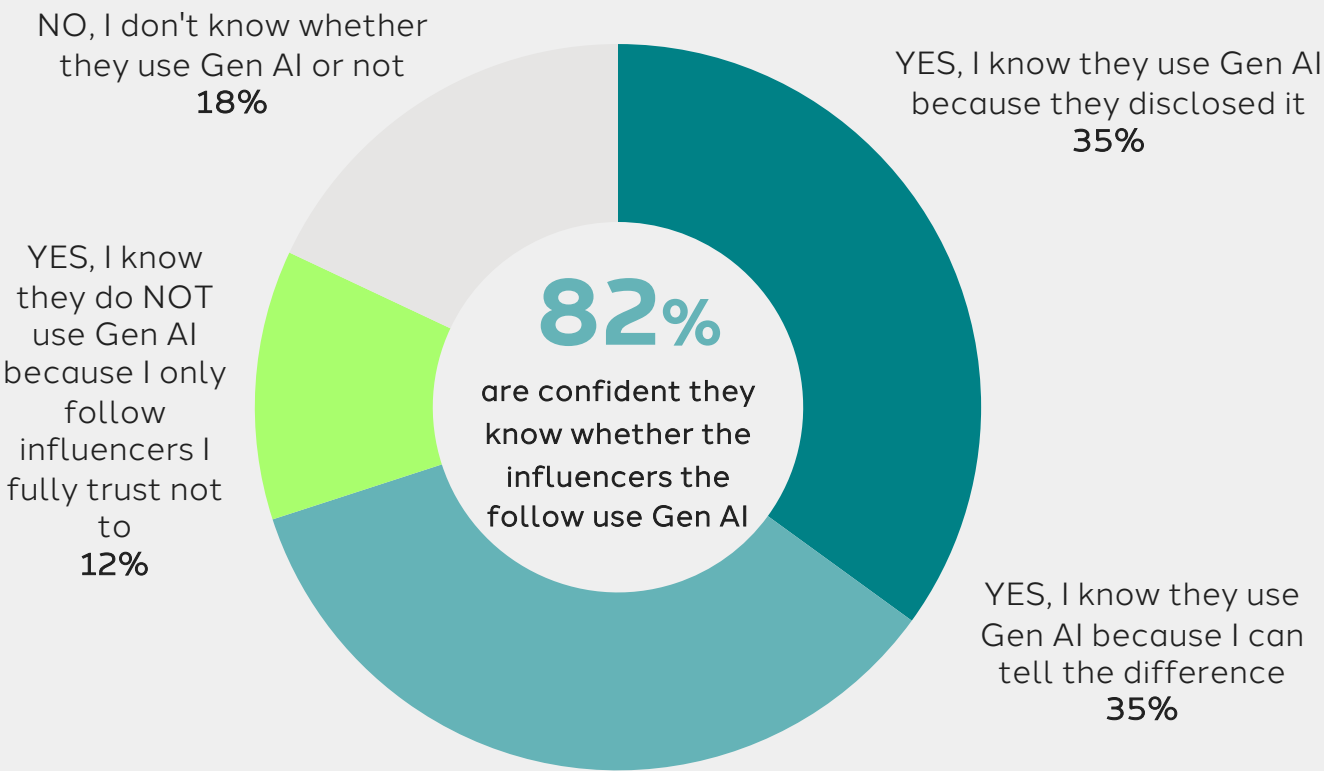
Women, Millennials, and Boomers are most likely to turn to influencer content as a reaction to AI.



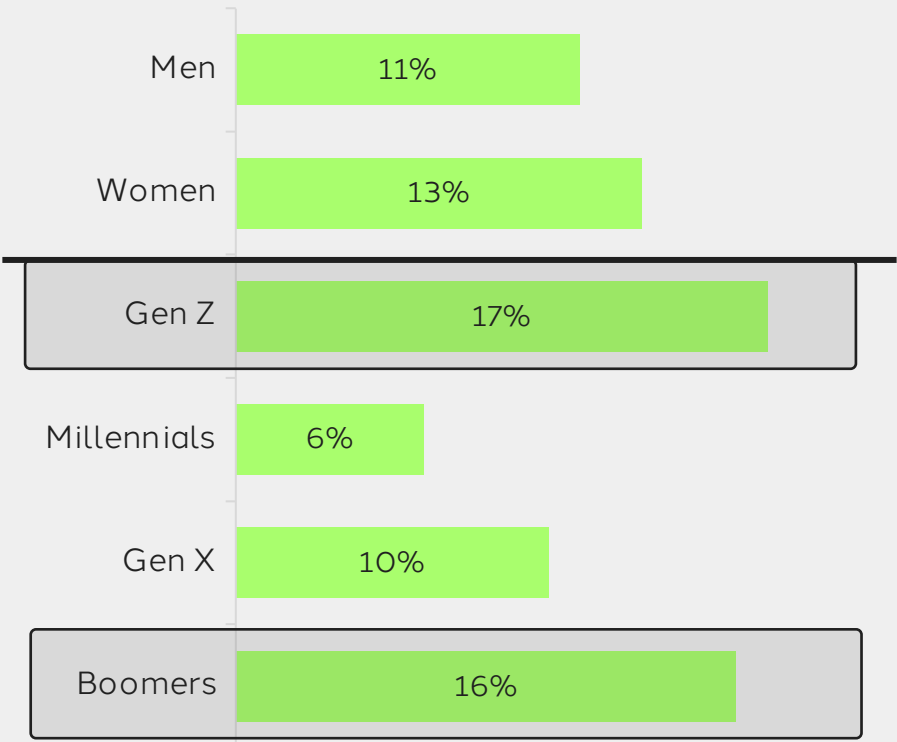
# THE VAST MAJORITY OF USERS ARE CONFIDENT THEY CAN TELL IF AND WHEN INFLUENCERS ARE USING AI.

Gen Z and Boomers over-index on reporting they follow influencers who they fully trust not to use AI.

## DO YOU KNOW IF THE INFLUENCERS YOU FOLLOW USE AI-GENERATED CONTENT?

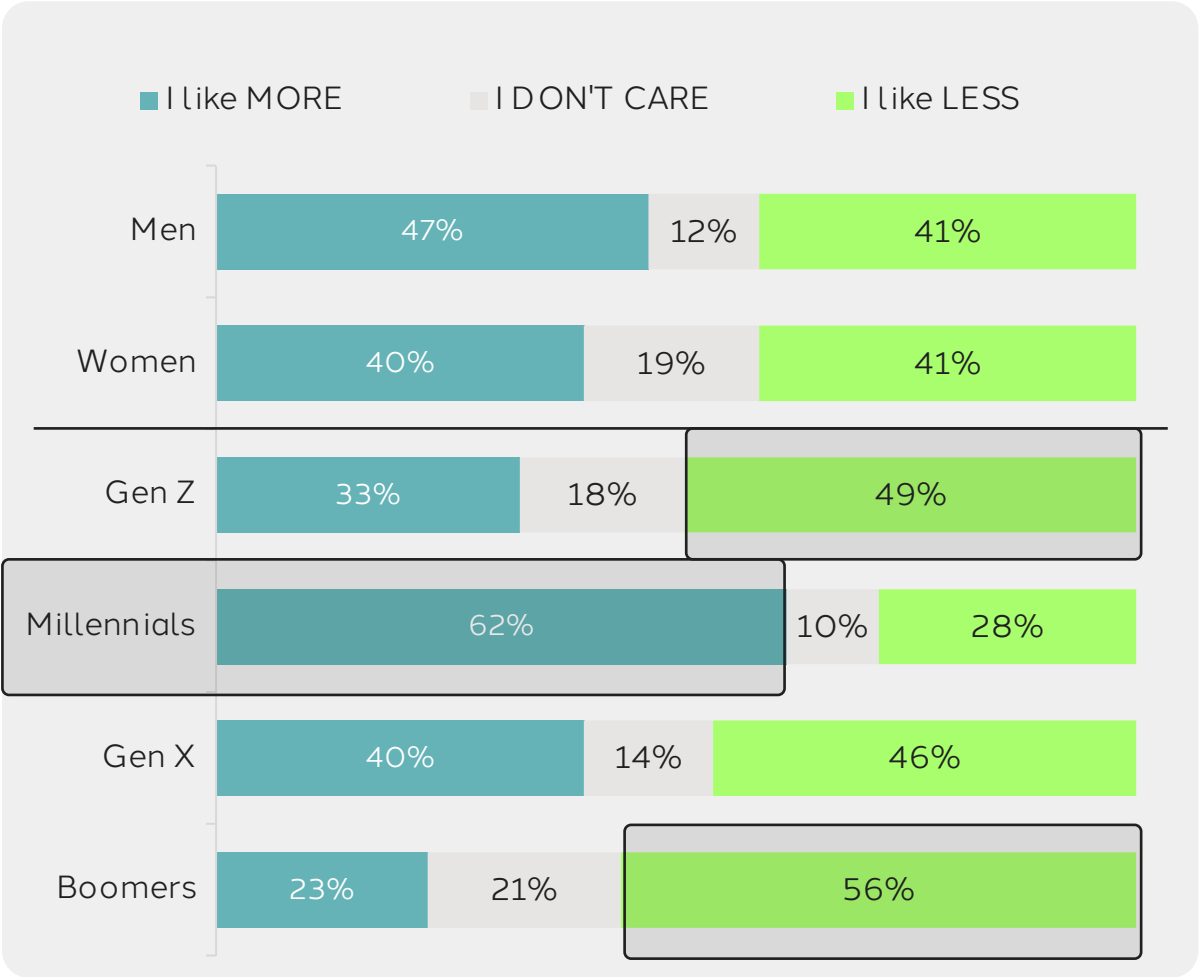
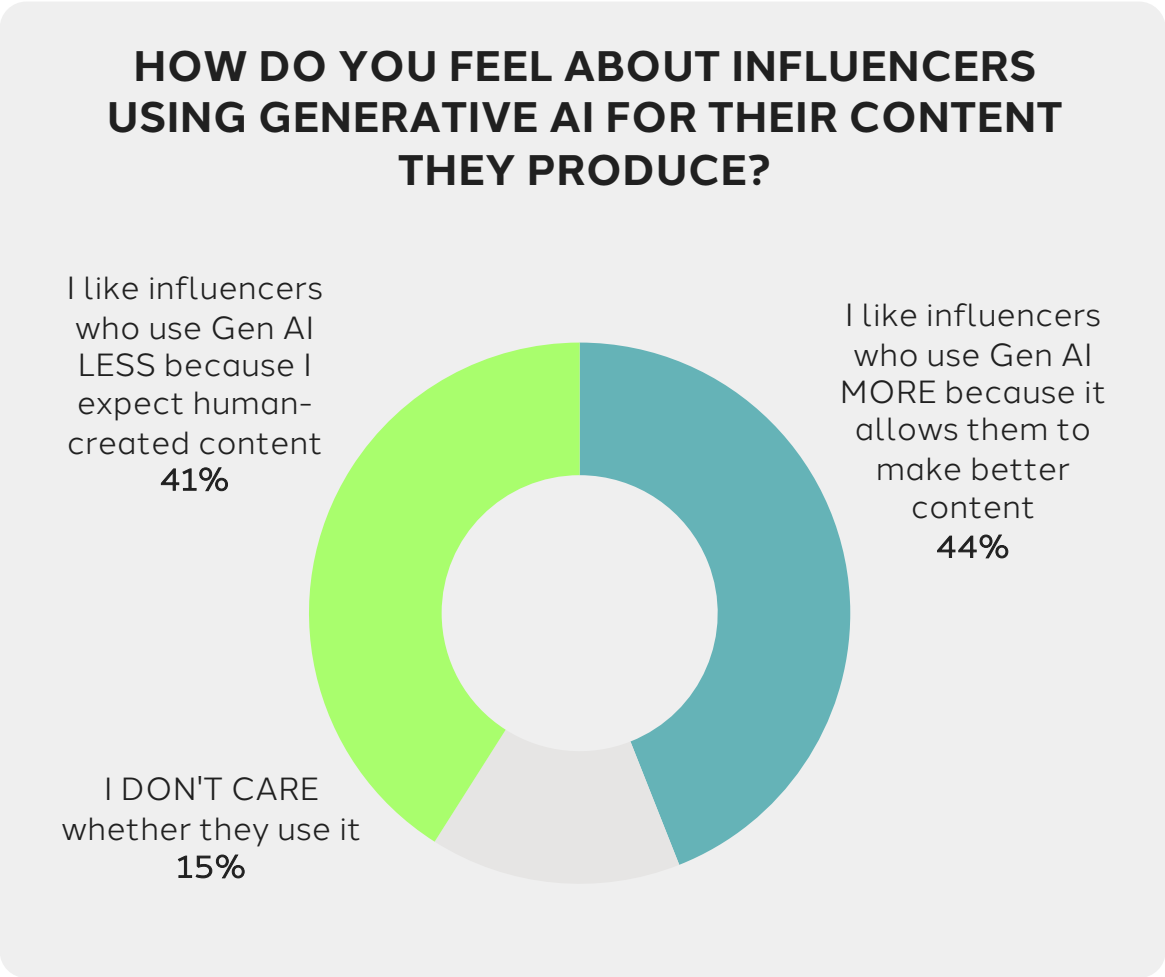


## “I ONLY FOLLOW INFLUENCERS I FULLY TRUST NOT TO USE GEN AI”



# CONSUMERS ARE SPLIT ON WHETHER INFLUENCERS USING AI FOR THEIR CONTENT DEVALUES WHAT THEY DO OR NOT.

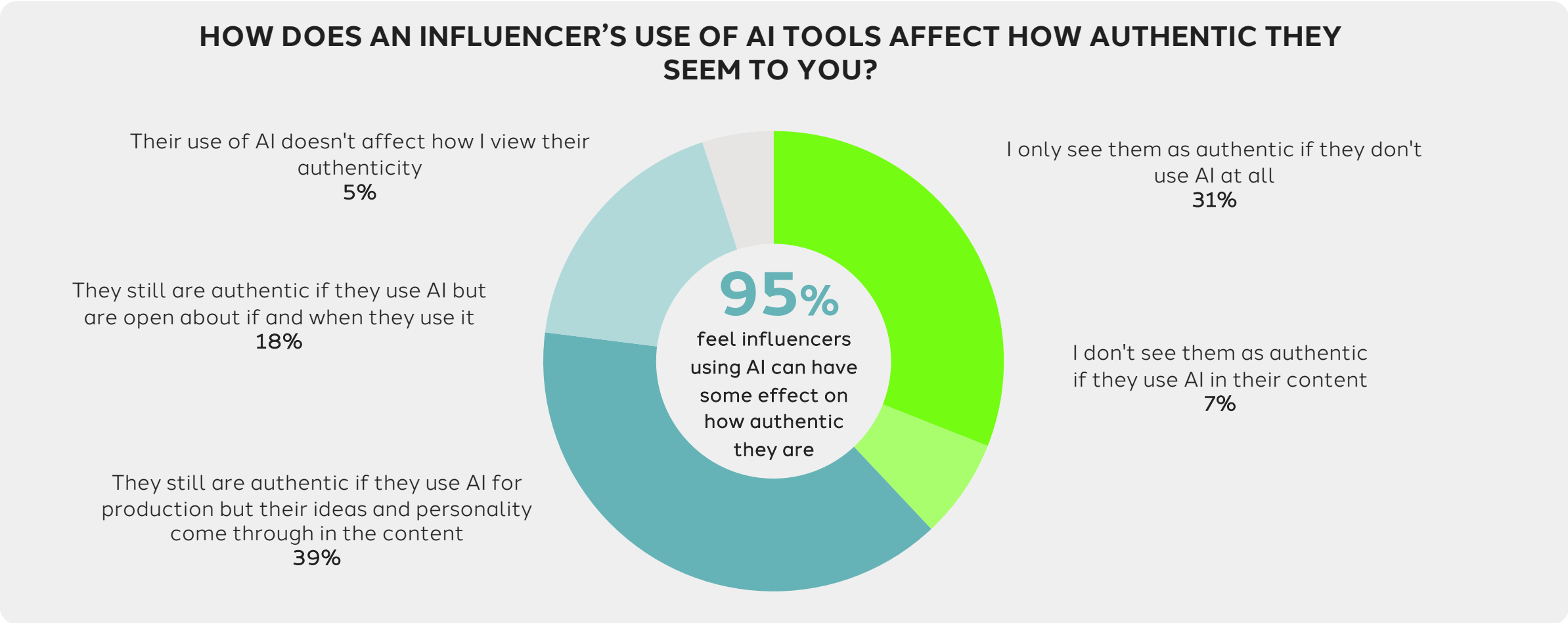
Millennials are more likely to like influencers using AI more, while Gen Z and Boomers over-index on saying AI usage is a turn-off.





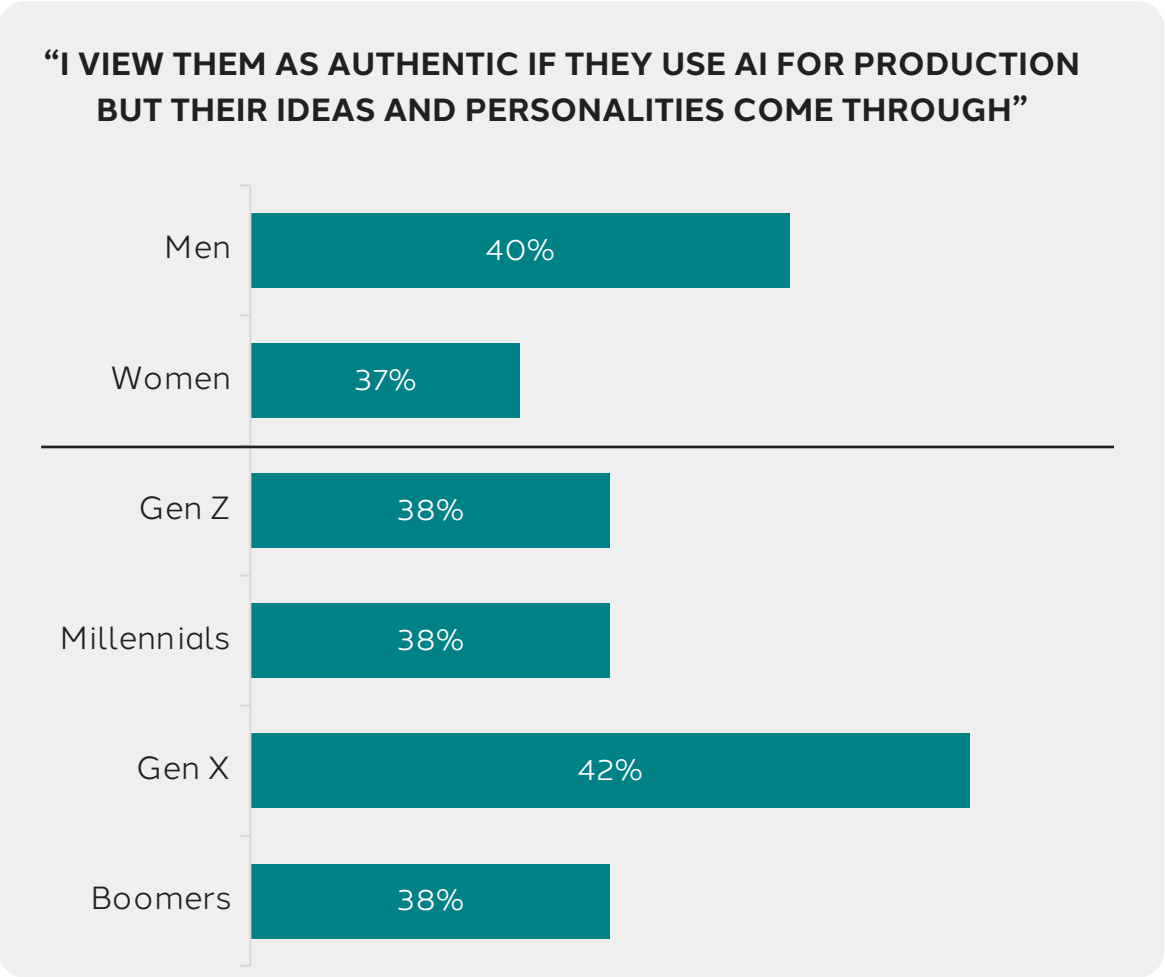
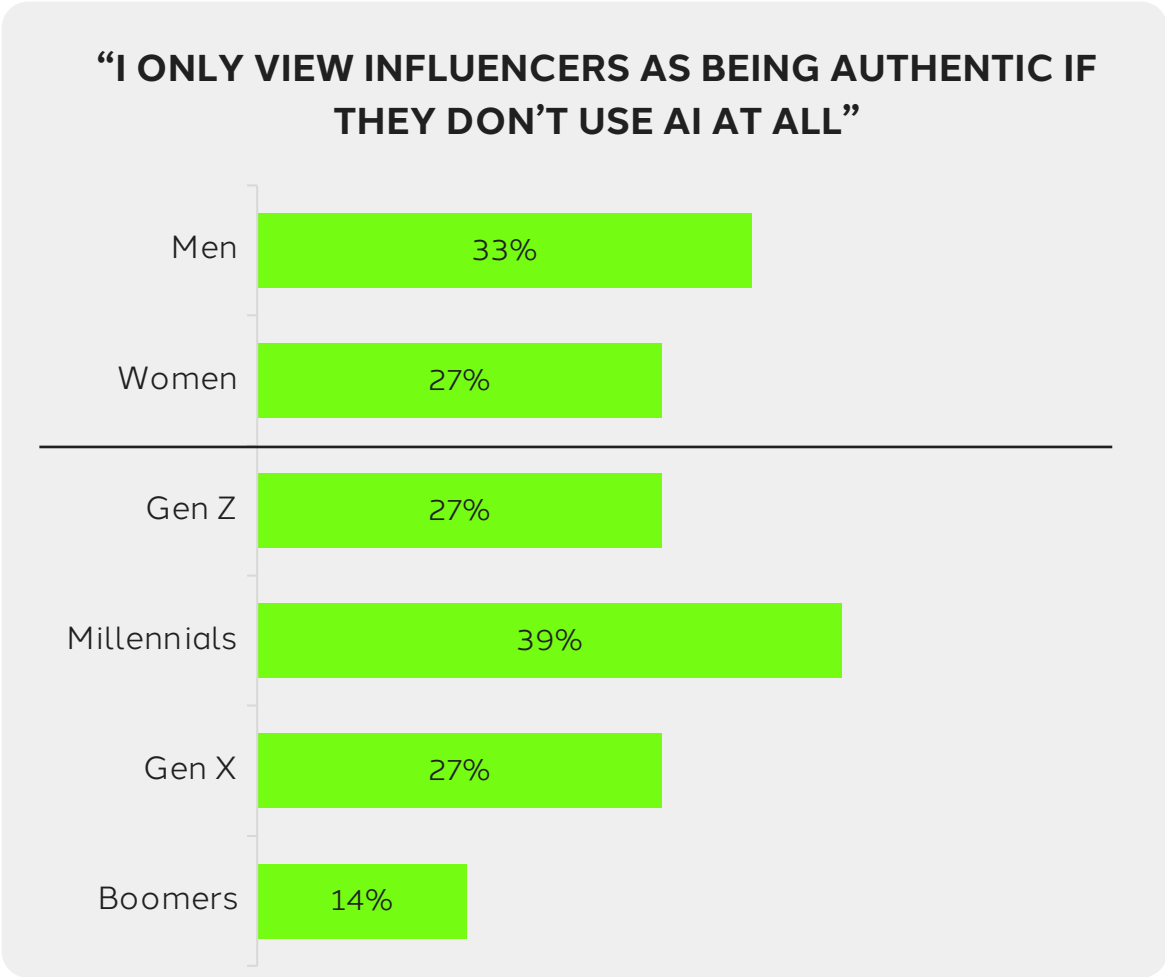
# AI USAGE CAN LIKELY AFFECT CONSUMERS' VIEW OF HOW AUTHENTIC AN INFLUENCER IS.

However, being transparent and limiting AI usage to a means of production that doesn't involve ideas are ways for influencers to still come across as authentic to their followers.



# MILLENNIALS MAY LIKE INFLUENCER CONTENT THAT LEVERAGES AI MORE, BUT AT THE SAME TIME THEY FEEL THIS MAKES IT LESS AUTHENTIC .

Gen X are most likely to be lenient as long as the ideas and personalities of influencers are unscathed.



# MOST CONSUMERS EITHER FOLLOW OR HAVE AN INTEREST IN FOLLOWING AI-GENERATED INFLUENCERS.

Almost 4 in 10 report already doing so.

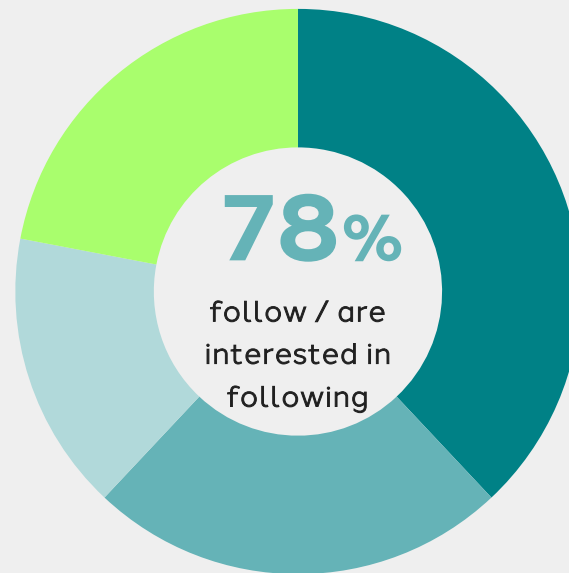
## WOULD YOU BE OPEN TO FOLLOWING AN AI-GENERATED INFLUENCER ON THE SAME PLATFORMS WHERE HUMAN CREATORS SHARE REVIEWS, LIVESTREAMS, ETC.?

No, I'm not interested in following an AI influencer  
22%

I already follow one or more AI-generated influencers  
38%

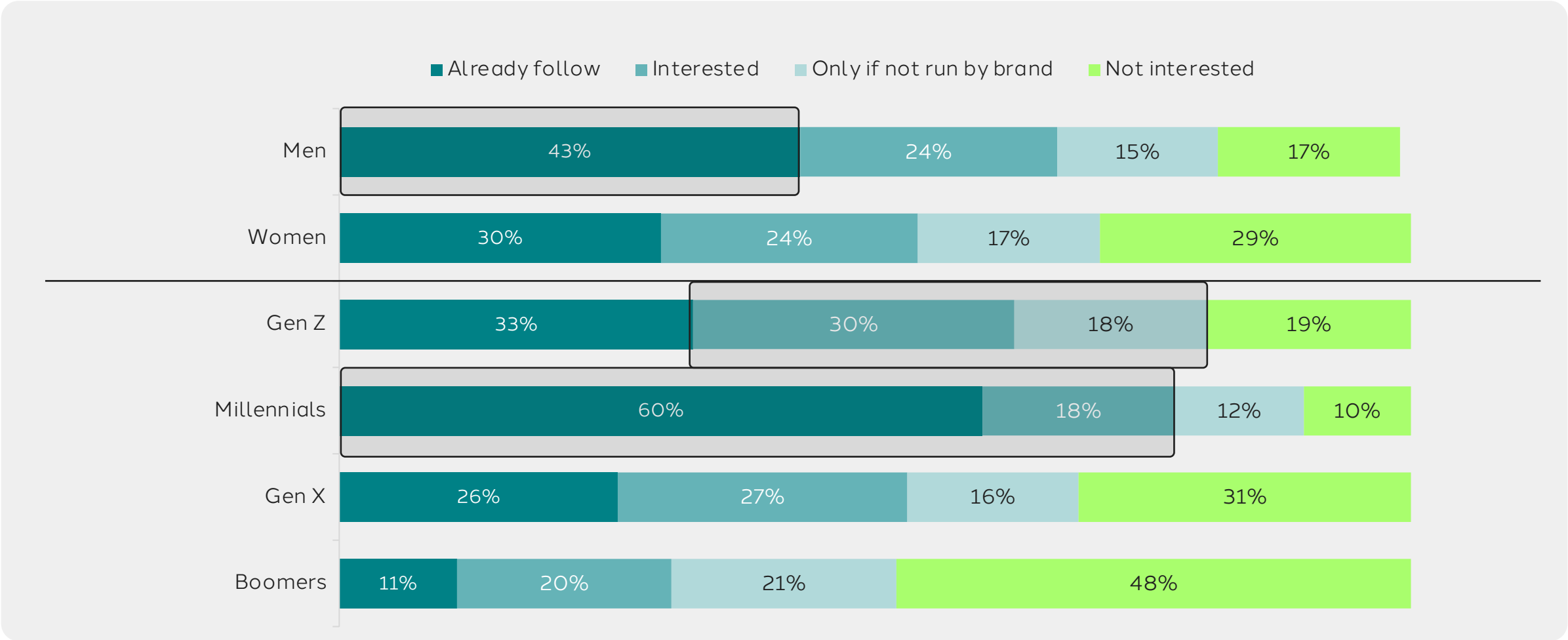
I might follow an AI influencer but only if they aren't run by a brand promoting its own products  
16%

I don't follow any now but I am open to following AI influencers  
24%



# WHILE BEING STRICT ABOUT HUMAN INFLUENCERS USING AI, MILLENNIALS ARE MOST LIKELY TO ALREADY FOLLOW AI-GENERATED INFLUENCERS.

Gen Z is the cohort most interested in following AI-generated influencers in the future.



# IMPLICATIONS FOR MARKETERS

## IN THE AGE OF AI, INFLUENCER MARKETING WILL BE MORE IMPORTANT THAN EVER.

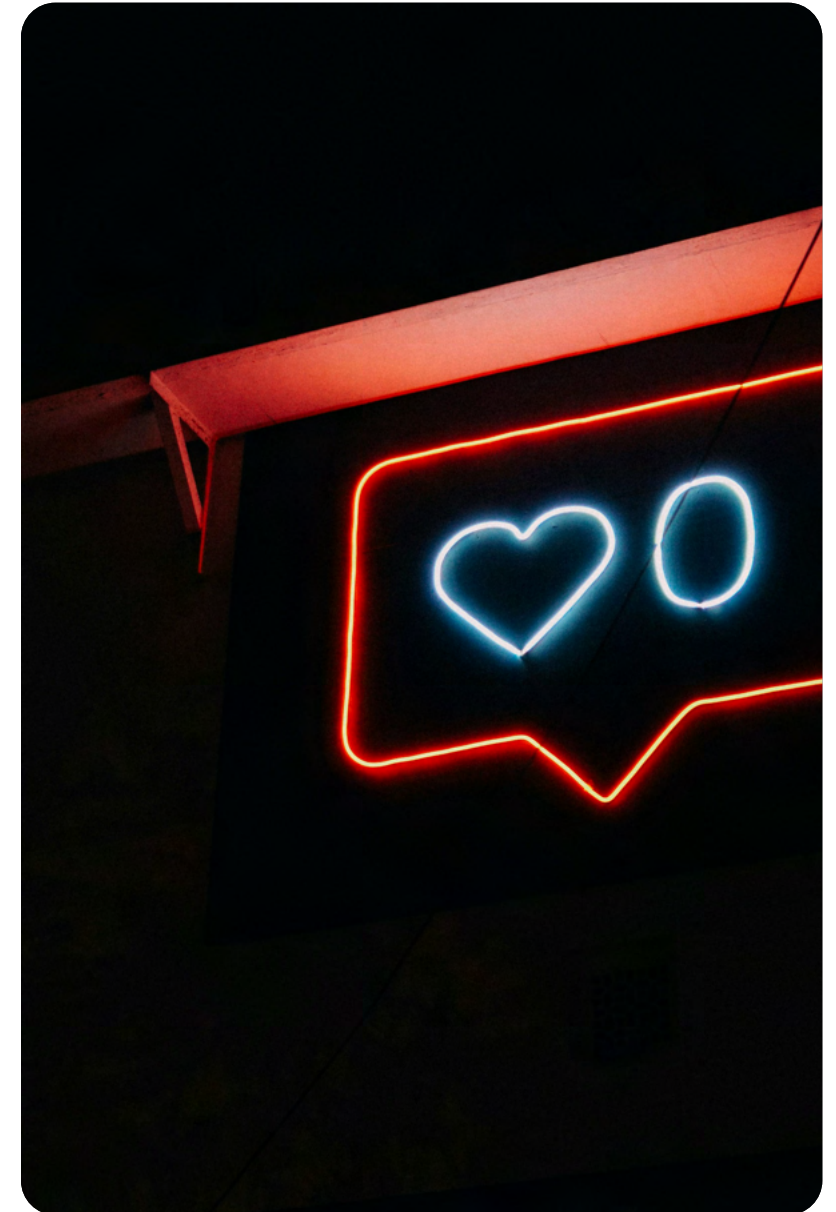
As an increasing share of online content will become optimized or fully generated by AI, consumers will turn to human creators as a reaction. Brands should no longer think about influencer marketing as a ‘nice-to-have’ or an optional add-on, but rather as the fundamental way in which they can speak to human needs, like empathy and familiarity.

## COMBINING HUMAN INFLUENCERS AND AI-ENABLED MARKETING CAN CREATE BACKLASH.

Consider siloing campaigns that are centered around human creators from those where you are relying on Generative AI for scale and velocity. If you mix the two because your campaign needs demand for it, be clear on how AI is being used to enhance production but without taking away from the originality of the creator’s ideas and personality.

## THINK ABOUT AI INFLUENCERS AS MASCOTS VS SELLERS.

While it is evident that there is a share of consumers who are already leaning into AI influencers or interested in doing so in the future, don’t assume that these personalities can push sponsored content and endorse products/services in the same way that human influencers are welcomed to do. There is a novelty factor at play that can bring benefits to brands, but once these agents are perceived as ‘selling bots’ the interest might decline.





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# THANK YOU

## ABOUT DENTSU

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