



CIVEY **CENSUSWIDE**
THE SURVEY CONSULTANTS

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FOREWORD FROM TAKUMI
@mixplor

Introduction

The social media influencer landscape has seen several twists and turns in 2019.

From the fallout from Fyre Festival through to Marissa Fuchs' elaborate Instagram proposal¹, which was a carefully orchestrated series of brand partnerships - both are prime examples of inauthenticity that led to substantial public backlash. The industry and influencers themselves are, quite rightly so, under more scrutiny than ever. It is vital if marketers, brands, and influencers are all going to continue to derive value and creativity from the sector.

While there are nuances of measurement and ROI as the sector continues to evolve, are there more significant factors at play around consumers and

brands' trust in influencers – and vice versa? We have spoken to over 4,000 consumers, marketers, and influencers across the UK, US, and Germany to dig into the real and contrasting opinions about what the legislative and creative landscape of Instagram influencer marketing holds. Trust is strong across the industry, but relationships between brands, consumers, and influencers are becoming both more important and nuanced. *HINT: it's not about who you know, but how well you know them ...*

Consumers are, more than ever, being swayed by influencers when it comes to purchasing decisions. Somewhat unsurprising, this is most true of 16-24-year olds, 60% of whom credit influencers with purchases they have made in the past six months. This result represents a

13% rise in the UK consumers who responded to our 2018 study into the link between Instagram and purchasing behavior.

More broadly, it was interesting to see this year that 17% of 55+ year olds in the UK and US said that social media advertising in general impacts their purchasing decisions – a sizeable proportion.

The following report will contrast the opinions and perspectives of people from all sides of the influencer marketing industry, with a focus on four key themes; **Legislation, Authenticity, Influence & Trust, and Creativity & Control** – all central to successful collaborations.



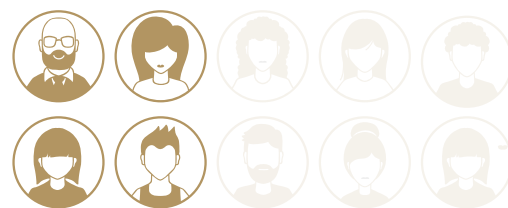
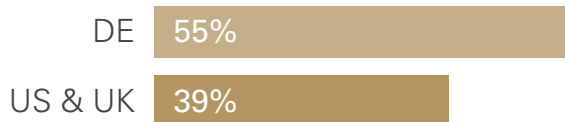
Adam Williams (Sven)
Chief Executive Officer
Takumi





Survey results

39% of US & UK marketers & 55% German marketers want complete control over the caption and visual of an influencer's post



40% of consumers trust brands to be transparent about gifting or paying influencers



German marketers prioritise an influencer's creativity and style when collaborating

However **US & UK Marketers** prioritise clear communication



% of influencers trust brands to work with them fairly



% of consumers who will unfollow influencers if they find out they had bought fake followers



#FAKE

Influencers' fake followers or inflated metrics are marketers' shared main concern

% of consumers who will unfollow influencers if they find out they had incorrectly labelled paid posts (not making clear what is an ad)





Legislation

Compared to more traditional mediums, such as TV and radio advertising, influencer marketing is a relatively new form of brand promotion, and as such the rules and regulations have rapidly taken shape - and are still evolving.

Social media platforms themselves have played a large part in enforcing rules - and have developed capabilities that make ad labeling possible.

But are influencers, marketers, and consumers aware of, and do they fully understand the guidelines?

In the UK and US, 88% of marketers felt the Advertising Standards Authority (ASA) or

Federal Trade Commission's (FTC) respective guidelines on labeling paid-for influencer content were clear. In Germany, this was significantly lower, with 52% of marketers understanding the Medienanstalten's guidelines.



While marketers are mostly clear on the guidelines across all three nations, many called on further development or clarification on these guidelines. As a relatively new medium, the rules and regulations around influencer marketing are still undergoing

development in many countries, and it's clear the majority support this. More than half (56%) in the UK and the US felt the ASA or FTC guidelines, although clear, did need further development. In Germany, 35% also called for further clarification.

In the UK, less than a fifth (19%) of marketers flagged influencers not labeling posts correctly as a top concern, while in the US only a quarter (25%) were concerned. Shockingly, just 4% of German marketers who work with influencers were concerned about incorrect labeling of posts, despite the fact that only 10% said they trust influencers. This could be because they feel the regulations are clear for everyone involved - or was it because marketers feel labeling is not their responsibility? These are all of the issues we will explore.



But what do influencers themselves think about the guidelines?

In the UK and US, influencers seem confident in their understanding of the respective ASA or FTC guidelines for labeling paid-for content with 87% confirming this.

However, due to the changing landscape in the industry, influencers are in agreement with marketers that legislation is an evolving process.

"I don't think the guidelines are all encompassing yet. There are some instances & conditions which aren't covered in the guidelines yet or ones that beg further detail. I think these will be updated as the industry grows further. It's great to finally have a concrete starting point to help provide legal structure to this industry though,"

says UK fashion, lifestyle, and beauty Influencer Bushra Sidd, @bsiddlife.

The German market has the least clarity. While an overwhelming majority (96%) of German marketers who work with influencers were not concerned about influencers labeling posts, German influencers themselves do not have a good understanding

of their obligations. Only 1 in 7 (11%) of German influencers are confident and completely understand their responsibilities in relation to Medienanstalten guidelines for labeling posts.

This creates a massive risk for brands who place trust in influencers to self-regulate and illustrates the huge education piece still required in order to safeguard brands and consumers from misleading unregulated promotions.

To mitigate risks, more and more brands are turning to trusted influencer marketing platforms to monitor and manage their compliance obligations.

Influencers aren't alone in seeking clarity on signposting paid-for content.

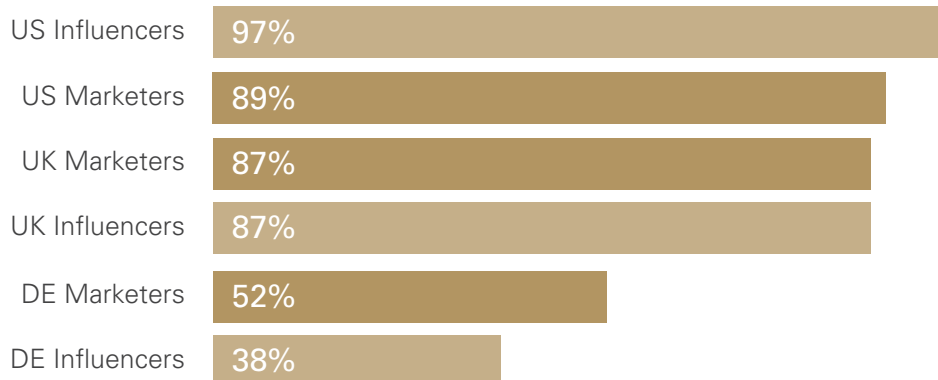
UK fashion and lifestyle influencer Ama Godson, @amagodson_a, says

"Takumi is very clear on each post's instructions regarding what is required for the ASA guidelines and declaring paid posts but other brands I work with are not as stringent or clear, so I guess this is where the uncertainty lies."

Despite increasing penalties being issued by governing bodies for incorrectly labeled paid content, it seems some influencers actually feel pressured by brands to not disclose brand partnerships – presumably in an attempt to make endorsements feel more 'organic'.

Shockingly, 62% of influencers across all three territories have been pressured by brands to contravene the guidelines at least once. Thankfully, 28% of this group say this is a rare occasion. A further 37% of UK influencers never feel pressured by brands.

Figure 1 - How clear are the guidelines on fraud? Are the legislative guidelines clear? Yes! say....



But this will not cut it.

Consumers are aware of how paid partnerships work and have come to expect that brands and influencers are transparent about content that has been created in a commercial arrangement.

Failing to be transparent or correctly label content will create further confusion and doubt for consumers about what can be trusted.

Not only that, the ASA does have the power to impose sanctions on both brands and the influencers they work with² - and the responsibility lies with both parties.

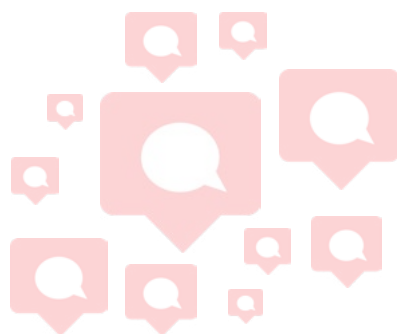
At Takumi, our proprietary platform notifies us if influencer posts are non-compliant, for example, if specific signage is removed. Including #AD should be the bare minimum, but we have recently updated our ways of working so that all influencers have to start their posts' caption with #AD before any other text, for absolute clarity. Our technology flags when influencers have submitted content that isn't correctly signposted as sponsored and these posts are removed automatically. We also don't pay our influencers unless posts are legally compliant for posting.

Authentic collaborations, whether paid-for or otherwise do not turn consumers off. Clearly, signposted partnerships will only boost consumer confidence

towards all involved. Consumers will not tolerate obfuscation, as we will discuss later.

Famous Famous or Insta-Famous

Along with influencers and brands themselves, the governing advertising bodies are also playing a role in shaping the profile of influencers - and how they compare to celebrities.



Interestingly, more than 3 in 5 consumers (62%) agree that they understand the difference between an influencer and a celebrity, with almost a quarter (23%) strongly agreeing.

While the general public might make a clear distinction between traditional celebrities and "Insta-famous" influencers with a large social profile, the UK's advertising regulatory body has recently brought this distinction into question.

When ruling on a case in July 2019, the ASA said, "over 30,000 followers indicated that [Sarah Willox Knott] had the attention of a significant number of people.

Given that she was popular with, and had the attention of a large audience, we considered that @ThisMamaLife was a celebrity for the purposes of the CAP Code."

Willox Knott's 32,000 followers would, by many people's definition, class someone as a micro-influencer. There is clearly a grey area between public and industry perception and that of the regulator. Surprising many in the industry, this ruling means many influencers may now be subject to tighter regulation on paid partnerships and brand endorsements, including restrictions on the types of products they can promote.





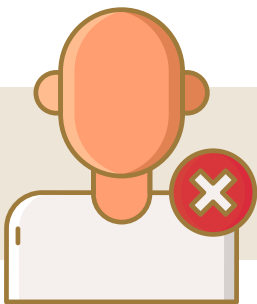
Authenticity

Ad Disclosure

Portrayal of Reality

Instagram has always been an aesthetically focussed channel, with influencer content taking aspirational visuals to a new level. But the tide is turning, as the conversation around mental health, social media pressure, and body image increases. Consumers are seeking more realistic, authentic, and diverse content on social media and beyond.

Our study showed that the majority of consumers across the UK (68%), US (78%) and Germany (61%) said they would unfollow an influencer if they found out they had promoted unrealistic or unsustainable lifestyles or body image.



Furthermore, an even higher proportion (67% UK, 80% US and 61% Germany) would unfollow an influencer if they found out they had dramatically misrepresented themselves or their lifestyle to followers. This is where brand partnerships which are not based on shared values and a real relationship can backfire on both the creator and brand.

Consumers are increasingly opposed to influencers using Photoshop to dramatically edit their body, or their location and lifestyle. There have been cases of extreme post augmentation bringing influencers under fire, and TV personalities from Kim Kardashian to Geordie Shore's Holly Hagan have been accused of photoshopping their faces and bodies.

be great to see different faces... I believe there are some brands out there that are trying to be inclusive as well as diverse each time they release new products or a collection, but I just don't think we've seen enough of it so far in 2019!"

Figure 2 – Top reasons people unfollow influencers



- 1 Disingenuous endorsements
- 2 The promotion of unrealistic or unsustainable lifestyle or body images
- 3 Influencers dramatically misrepresenting themselves or their lifestyle was also a big 'turn off'
- 4 Has bought fake followers

UK fashion and lifestyle influencer Ama Godson, @amagodson_a, is one of many influencers keen to see brands diversify further when working with influencers:

"Whenever new campaigns come out for new collection release, it seems that brands are constantly working with the same faces on each campaign. It would





SECTION 3
@tomkahler

Influence and Trust

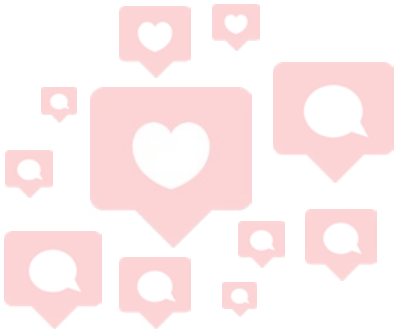
We have seen that the shifting legislative landscape, combined with how authentic influencers' content is perceived to be, has a significant impact on whether consumers will remain tuned in to their endorsements and recommendations.

However, the issue of influence and trust spans everyone involved in the industry and is so closely linked to delivering ROI and value that it merits a closer look.

What do brands think of influencers? Do influencers trust brands to work with them fairly? Is consumer action spurred by social media content with influencers?

Influencers increasingly holding court with consumers

When asked which marketing channels influence their purchasing decisions the most, the power of social media on consumers was evident across all age groups.



A massive 91% of 16 - 24 year olds in the UK and US credited advertisements on social media with influencing their purchasing habits. Further, 60% of this

age group credited influencers on social media with driving purchases within the last six months.

While TV and radio advertising remained the dominant medium in consumers' minds - the issue of trust gets to the heart of how people are purchasing, and our research responses hit a positive future for influencers and brands who are getting partnerships right.

In the UK, 'a personal recommendation from someone you trust' was the most influential factor in purchasing for almost a fifth of respondents (18%), rising to 25.4% in Germany and 32% in the US. This personal recommendation could span across family, friends, or online recommendations from forums, brands, or influencers.



When explicitly asked about influencers' recommendations, consumers across all countries were in fact equally receptive - with 34% of consumers in each of the three countries saying they are influenced or strongly influenced to purchase products or services based on social media influencers' content.



Almost 9 in 10 (86%)
US/UK marketers
trust influencers

Versus just 1 in
10 (10%) German
marketers



It is clear that consumers are confident in making the distinction between celebrities and influencers, but there is also a distinction between the levels of trust consumers hold for influencers versus celebrities and how powerful they can be.

Over a quarter (27% combined) of UK (23%) and US (29%) consumers trust social media influencers more than high profile public figures/celebrities that promote brands which are relevant to them, with 1 in 12 (8%) strongly agreeing. This rises to over a third (35%) among the German consumers surveyed reporting they trust social media influencers more than high profile public figures/celebrities, with 1 in 10 (12%) strongly agreeing. That's fairly extraordinary for a fledgling industry.

And it doesn't stop there. Of the consumers who took part in the study across Germany, US and UK, almost a fifth (19%) said they trust a social media influencer's recommendation on a product or service more than a recommendation from a friend.

What do influencers think of brands?

In the fight for compelling, authentic, and creative content on social media through influencer marketing, trust is also vital between influencers and brands.

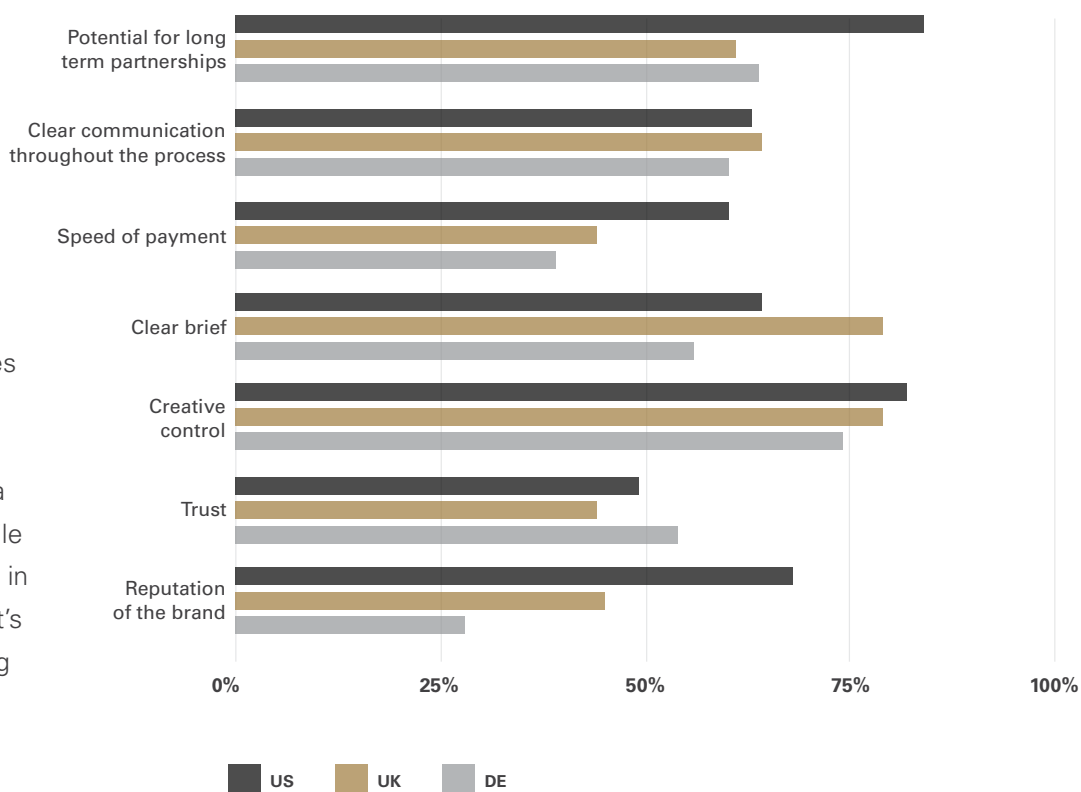
The good news is that on the whole, influencers do trust brands to work with them on a fair and

transparent basis, with just 4% of influencers said they do not trust brands to work with influencers fairly.

However, this isn't the most important factor for influencers choosing to work with brands. Lots of factors impact a good working relationship.

Influencers across the study said they "Don't like cookie cutter briefs, but clarity is key"³. Increasingly, long term partnerships are highly valued by influencers- and in the US, this is the single most important factor for influencers when deciding to work with brands.

Figure 3 - What's most important to influencers when working with brands?





Creativity versus Control

Creative control is the top priority for influencers across the board when working with brands, as seen in Figure 3 – What’s most important to influencers when working with brands?

The past 12 months have seen some creators produce extraordinarily high-quality visual content for brands’ marketing channels. The trends for influencers acting as ‘creative directors’ for brand communications shows no sign of slowing and has the potential to produce some of the most innovative content.

However, creative control is valued just as much by marketers who want to protect their brand identity.

In general, the visual element of the post is where marketers would like the most control: 1 in 5 (22%) want to influence the style, and 9% would like full control of the visual.

scripted. Generally, they see that short captions give better engagement – and long captions don’t feel as authentic. UK lifestyle influencer Mihaela Nedeva, @mihaelanedeva says:

Figure 4 - Creative control is influencer’s no. 1 priority when working with brands



Marketers appear to be more open-minded about the caption: 1 in 10 (10%) want full control, and less than 1 in 10 (7%) marketers feel they should get some input.

The influencers surveyed reported that including too many key messages makes captions feel

“After all, our job is to express our creativity and if we can make sponsored content feel less forced, then our audience is more likely to trust us.”



Similarly, when it comes to the caption, US travel and lifestyle influencer Orlando Buddle @orlandobuddle says



MY AUDIENCE KNOWS ME PRETTY WELL, SO GETTING A CAPTION PRESCRIBED TO ME WITHOUT ANY CONSIDERATION OF MY BRAND TONE IS WHEN THINGS START SOUNDING UNNATURAL AND INAUTHENTIC.



As influencers are most in-tune with their audience and have been hired for this very reason, creative control sounds relatively reasonable, especially if the brand and influencer have a good relationship based on trust and shared values.

But brands aren't ready to let go. Incredibly, 55% of German marketers and 43% in the US feel they should have complete control over the written captions and visual elements of an influencer's post they have paid for, viewing it as the same as an advertisement they have paid for another channel, such as TV or radio. In comparison, more than a third (36%) of UK marketers agreed.

This transactional and clinical approach to influencer partnerships also came to light as an issue when we spoke to influencers. UK fashion, beauty, and lifestyle influencer Marilyne Tran, @marilynetran, has worked with a range of brands in the past two years and has experienced first-hand how sometimes brand guidelines and expectations can hamper creativity.



THE MOST COMMON CREATIVE CHALLENGE IS WHEN WORKING TO EXTREMELY SHORT DEADLINES. I OFTEN HAVE TO DELIVER CONTENT IN LESS THAN A DAY. IN THESE CASES, IT'S IMPOSSIBLE TO SOURCE LOCATIONS, SCHEDULE MY PHOTOGRAPHER AND THIS LIMITS WHAT I CAN DO CREATIVELY.



Marketers outsourcing their creative content generation to influencers on social platforms need to trust influencers as much as they say they do. Although marketers reported



up to 86% trust in influencers, they are stifling the results by controlling the creative process. This risks losing the creativity and authenticity that resonates so well with consumers.

Influencers need to plan and produce their content just as any brand-side creative would, but it seems many brands need to change their perception of influencers from a tactical marketing fix to seeing them more as creative directors.

US fashion, lifestyle, and travel Influencer Orlando Buddle, @orlandobuddle, illustrates this tension clearly saying,

"Often brands prefer to dictate every single step of the creative process, but this is a partnership. At the end of the day, we are getting paid to solve a problem and without getting the opportunity to bring our unique creativity, innovation and personalities to the table, is becomes pretty limiting."



In reality, influencers across the US, UK, and Germany are split on whether brands were stifling their creativity. On average, 26% of influencers agreed, and 26% disagreed, while 38% have no strong feelings either way. Anecdotally, a common feeling from the influencer community was that brands being too prescriptive with their briefs jeopardized their authenticity, making them more selective about which brands to work with.

So, who will win in this struggle for control?

There is a balance to be struck with both marketers and influencers protective of their brand and battling it out for control. Establishing effective ways of working that suit both parties is the key to success, and the brief is central to this.



A clear brief can reassure brands, giving them the confidence to trust influencers and for influencers, this grants them the freedom to create content that feels authentic to their personal style and for their audience, while in line with the brand's expectations.

UK fashion, lifestyle, and beauty Influencer Bushra Sidd, @bsiddlife, summarises the benefits of a brief, but also the importance of trusting influencers and giving creatives the flexibility they seek:

"I tend to quite like a detailed & specific brief as opposed to a vague one. That way it's easier to create & deliver exactly what the brand wants without a lot of iterations & re-work. If what they want doesn't fit well with what I do, it probably won't be a worthwhile partnership to pursue for either parties. So best to know that early on. However, if something just doesn't work for my profile or audience & I present a slightly different creative angle to the brand that I feel would work better, it's great to be heard & considered because at the end of the day, the creator knows their own audience & capabilities best."

Although too tight a brief can be "stifling," UK fashion and lifestyle influencer @amagodson_a agrees a brief has benefits, and

"Can also act as direction and idea suggestions when creating the content."



SECTION 5
@a_coupleoftravels

The future

What's in store for the next 12 months?



Usage rights

Influencer content is becoming increasingly valuable as marketers incorporate this beyond social media and into the wider marketing mix. Brands are recognizing the creative, powerful, and impactful nature of influencer content on audiences, with 24% of UK and US consumers trusting brand content more if it has an influencer in it.

We are seeing more and more opportunities for influencers to monetize their content in new and additional ways; such as licensing their Instagram content for use

across a brands above the line activity, including TV, magazines and OOH billboard ads.

Influencers can sell the rights to their content to brands for use on other channels and platforms. However, many influencers are reporting difficulty developing benchmarks for licensing content. There are multiple variables and benchmarks for influencers and brands to consider; where the content will be used, for how long, and not least, the equivalent costs had the assets been created by the brand.

Usage rights are now coming into play in planning and contract stages. Many marketers are flagging the potential for broader use in contracts. If brands choose

to use content in above the line projects, negotiation often commences after the project ends.

Influencers are increasingly using more professional equipment to ensure higher-spec quality content that can easily translate into other formats, such as billboards or video commercials, marketing elements where iPhone quality content wouldn't suffice. The investment in better quality tech offers greater scope for monetizing content beyond social media.





In it for the long term

In addition, exclusive partnerships are now becoming more common, with both brands and marketers alike looking for long term partnerships. We are seeing an increase in influencers turning down short-term and one-off campaigns, instead preferring to build a closer relationship with a brand over a longer period of time. This relationship gives social media influencers opportunities to monetize themselves across multiple channels, such as events and product development - and also has significant benefits for a brand.

If consumers see influencers they trust posting about products within both paid-for campaign content and also organically, it re-enforces that the influencer has a genuine affinity for the product, and can be a trusted and authentic source of information.



Vanity metrics

In early iterations, social media platforms built-in what are now known as 'vanity metrics'. These

led marketers to focus heavily on visible reach data such as follower count or engagement data such as likes on a post, but the landscape is shifting.



As social media moves towards curating meaningful conversation, vanity metrics may face being phased out. This has begun with Instagram trialing hiding likes on posts in Australia, Ireland, and Canada, among other countries.

Instead, social media platforms are evolving to help influencers and marketers explore metrics that demonstrate deeper engagement and prioritize creativity. These may include measurements such as the number of direct messages an influencer receives about a story or post, how many times their photo or video is saved, the rate of comments and emoji reactions to stories.



IGTV

Launched in June 2018, IGTV is Instagram's native long-form

video channel that sits within the app. Since video itself was first introduced to Instagram, viewing rates have continued to climb with 60% more views in 2018 than the previous year. With similar growth across other social media platforms and more broadly, it is clear that longer-form video is the next big opportunity for influencer marketing.

A clear rival to YouTube, IGTV caters to long-form video content and allows influencers to connect closely with followers.

We predict that IGTV will continue to see growth, particularly as monetization options are rolled out alongside support for influencers.

At present, influencers can add affiliate links to featured brands on IGTV videos. These can be clicked on to open another window to purchase. However, the future may see in-app Checkout rolled out to IGTV with product tagging and boosting options also enabled.

We are seeing Instagram quickly becoming a one-stop-shop where brands and influencers can deliver an end-to-end customer journey, from announcing a new product, sharing reviews and tutorials right through to purchase following the roll-out of Instagram's in-app checkout function.





SECTION 6
@cassiesamji

Conclusion

Influencer Marketing is a billion-dollar industry, which has grown 300% since 2016 and is expected to be potentially become a \$6.5 billion industry⁴ this year.

With so much at stake, concerns about transparency, influencer fraud, and measurement need to be ironed out as the industry matures. Influencer marketing is increasingly in the public eye, with traditional media shaping perceptions of the industry and those working within it. Consumers are savvier than ever and highly likely to unfollow influencers for sharing misleading content.

From our survey, the message from consumers is loud and clear: ad disclosure and authenticity is

a big issue. People want to trust recommendations from brands and social media influencers, but this requires transparency and compliance with regulation to make clear what is and is not paid-for content. In the UK, ASA recently issued a report reminding brands and creators that “upfront disclosures” such as #ad are “necessary as a minimum”... It’s crucial that ads are labeled clearly.”

Simultaneously, marketers must take a shared responsibility for the signposting of paid-for collaborations. Currently, less than a quarter of all the marketers we surveyed are concerned with post labeling and report high levels of trust in influencers. Whether this is through complacency or confidence, the fact remains that shared responsibility for signposting must be a number

one priority. Even more shocking was the finding that 62% of influencers across all three territories have been pressured by brands to contravene the guidelines at least once.



So how does the industry address these trust and authenticity issues?

Firstly, marketers must take a proactive role in educating about - and enforcing - the correct ad



labeling to safeguard consumers and contribute to the evolution of robust regulatory guidelines.

Secondly, if influencers are involved from the start of a campaign and treated as a creative extension of the team, then not only will creativity flourish, but everyone involved will be accountable for the results.

It has to be said that marketers and influencers are clearly caught in a wrangling over creative control when it comes to content. Many creators are struggling with opaque briefs - that brands hold to the same quality standards as they would with self-produced content, but without giving influencers the budgets, timescales, and clarity afforded to in-house creative teams. Involving influencers from the campaign planning stage will help make clear briefs, genuine co-creation, and realistic timeframes a reality.

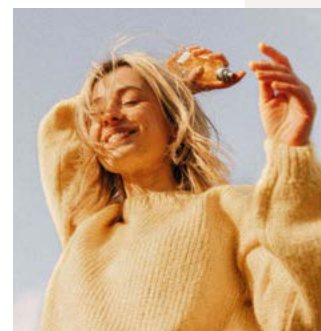
Ways of working processes and content monitoring need to be sharpened up between marketers and influencers, but consumers have made it clear what wins their trust, and what they value; transparency, authenticity, honesty. This is a strong foundation for us all to build on.

The brands and influencers that build on this foundation will be the real winners: a significant proportion of consumers report

that influencer content has directly informed a purchasing decision within the past six months, and almost a fifth trust social media influencers' product recommendations more than a recommendation from a friend. That is the power of responsibly created and curated influencer content.



As the industry continues to evolve at lightning speed; creators, brands, and consumers are all feeling the growing pains - but also playing an instrumental role in shaping the industry for what looks like a bright, bold future.





Methodology

In August 2019 Takumi, Censuswide and Civey executed and commissioned this study of;

- 750 Marketers across Germany, UK and US in August 2019
- 1,000 Nationally representative UK respondents (aged 16+)
- 1,000 Nationally representative US respondents (aged 16+)
- 251 Nationally representative DE respondents (aged 18+)
- 342 Instagram influencers across UK, US & DE who have been active on Takumi brand campaigns within the last 3 months (aged 18+)

Censuswide abide by and employ members of the Market Research Society which is based on the ESOMAR principles. Takumi also conducted research via survey monkey and face to face interviews.



APPENDIX

@amybucklesbookshelf

Contributions

Thank you to all the influencers and creators who contributed their viewpoints and experiences for this report.



Marilyne Tran

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Ama Godson

UK fashion and lifestyle Influencer

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Bushra Sidd

UK fashion, lifestyle and travel influencer

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Mihaela Nedeva

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US fashion, lifestyle and travel influencer

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Antuan Byers

US lifestyle Influencer

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