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Celebrity & Influencer Marketing Insights in 2022

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Introduction

Influencer and celebrity marketing are estimated to exceed $16 billion globally in 2022, which will mark another year of double-digit growth.

The growth shouldn't necessarily come as a surprise given that approximately 1 in 3 consumers globally want to see more brands invest in influencer and celebrity endorsements.

Now layer in that 3 in 4 (74%) sponsorship marketers believe that influencer and celebrity partnerships have more momentum than traditional property sponsorships across all passion points, and it's safe to say that this industry isn't slowing down anytime soon.

Would Like to See More Investment in Endorsements

% selected, among total consumers

32%
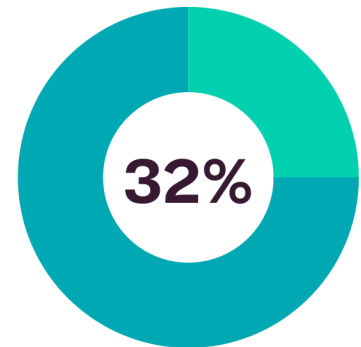
Specifically, where would you like to see more sponsorship investment – if anywhere? Base: Total Sample (n=1,771)

Positive Momentum for Sponsorship Marketing Trends

% net positive, among sponsorship marketers

Category	
Athletes/Personalities	
Cause & Charity	
Culture & Lifestyle	
Sports Teams	
Entertainment & Music	
Sports Leagues	
Amateur Sport	

0%   25%   50%   75%
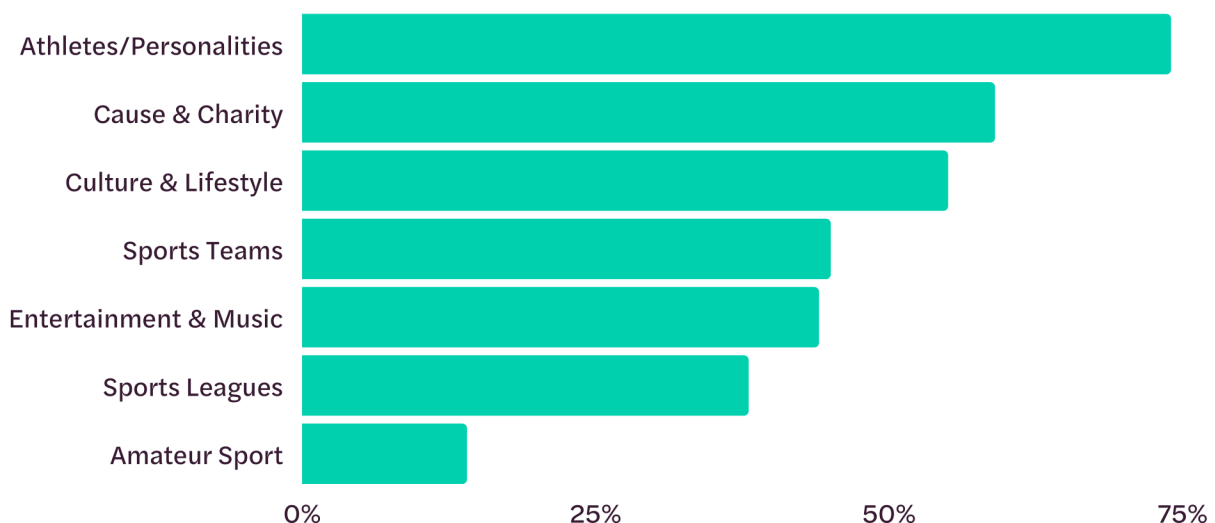
Looking at recent trends, what kind of momentum do you foresee for...? Base: Total Sample (n=217)

So as this vertical of the sponsorship marketing industry continues its growth trajectory, how will measurement evolve alongside it?

In recent years, endorsement decisions have largely come down to identifying the 'stars' or 'micro-influencers' in their respective fields and looking at their media footprint.

The reach that a personality can offer to a brand via impressions has become a relatively straightforward media transaction. As the industry has grown, talks of bots, fake followers, and inauthentic engagement have created growing concern among marketers. As the price of endorsements continues to rise, many are left wondering how to qualify the performance of those partnerships and whether the impressions being purchased should be the only currency worth considering in making these decisions.

It is imperative to understand how consumers actually feel about the personalities a brand may consider partnering with. Although many of these personalities have a general awareness or even a strong social following, does that always translate to interest or likeability? Would consumers be excited to meet these personalities one day? Will consumers support the brands that they partner with?

These are some of the important questions we set out to answer to provide a counterbalance to the media metrics and provide greater context on the opportunity at hand.

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Finding the sweet spot in achieving targeted reach

Dwayne 'The Rock' Johnson has near universal awareness in the US among 13-64 year olds, and we mean universal. With 98% of the population stating they're aware of who he is, that represents 213MM people who can be reached by associating with his brand.

His career trajectory has been a fascinating one, across business, entertainment, sport and beyond. Back in 2015, The Rock announced the launch of a partnership with Under Armour that has evolved into the Project Rock line that is 'built for the hardest workers'.

[1]
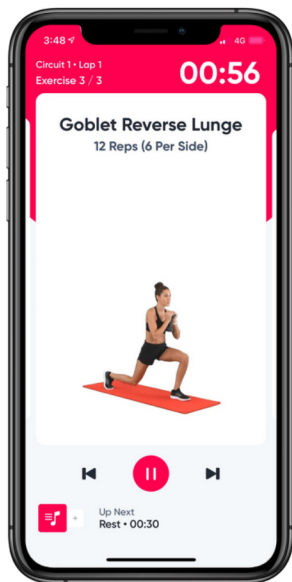
Now, consider Australian Kayla Itsines - one of the most influential personal trainers and authors - who co-founded Sweat and co-created High Impact with Kayla (formerly Bikini Body Guides, or BBG).

She has successfully built a community to empower women to improve their health and fitness, no matter your current fitness level. Notably, the Sweat app was sold to iFit in a deal reported at $400 million USD last year. Her awareness among Americans sits at just over 1 in 5, which represents the opportunity to reach 47MM people.

[2]

[1] Photo: underarmour.ca

[2] Photo: kaylaitsines.com

You don't have to be a mathematician to pick up on the fact that there is a significant difference in their respective awareness levels, but so to is the difference in their target demographic, tonality, and focus. The story and evaluation of an influencer or celebrity partnership often starts with reach and awareness, but it should be just that, the starting point.

Metric	Dwayne "The Rock" Johnson	Kayla Itsines
Awareness by Population	213MM	47MM
Awareness by Percentage	98%	21%

US General Population, Among Aware, Age 13-64

Early-stage brands looking to drive immediate awareness gains may elect to pursue the greatest reach over relevance, while established brands may take a finer look at brand fit and tonality. But it comes down to answering whether you're getting your brand in front of the right audience and at what price.

The tale of two legends making headlines, but on opposite ends of the likeability ladder

Now, we're not here to say that the following two individuals are often (or ever) in consideration side-by-side, but they certainly help make a relevant point.

American professional soccer player, Alex Morgan, has had quite the career. She became the youngest member of the US Women's National Soccer Team in 2009, was the first overall pick in the 2011 Women's Professional Soccer Draft and earned her first Gold Medal at the 2012 Olympic Summer Games. She also helped the US Women's National Soccer Team win the 2015 and 2019 FIFA Women's World Cups. As of late, Morgan has made headlines for her incredible play on the pitch as a striker and captain of the San Diego Wave FC, and her return to the US Women's National Team for the CONCACAF Championships where she scored the clinching goal in the Championship final against Canada.

USWNT vs. Canada score: Alex Morgan scores cup winner, USA clinch Olympic and Gold Cup berths

Phil Mickelson bolts to Saudi-backed LIV Tour after months of controversy

American professional golfer, Phil Mickelson (or Lefty as many call him) played the majority of his career on the PGA Tour and won 45 events and six major championships. He spent over a quarter of a decade inside the Top 50 Official World Golf Rankings from 1993 to 2019 and was the only player in the history of the sport to do so. Lately, he has been making headlines as the first PGA Tour golfer to leave and join start-up golf league backed by the Saudi Private Investment Fund, LIV Golf, for an undisclosed amount.

So, how do you think Americans feel about these two athletes?

With 140MM Americans aware of Mickelson, relative to Morgan's 90MM, there's a pretty sizeable gap of approximately 45MM Americans. But the importance of digging deeper into the likeability of a celebrity is critical in uncovering how quickly the tables can turn. Morgan has one of the strongest likeability scores at 60%, while Mickelson sits at just over half of her score at 32%. In absolute terms, that means that Morgan's likeability is equal to 54MM Americans vs. Mickelson's 45MM.

Awareness & Likability Comparison

Metric	Alex Morgan	Phil Mickelson	Difference
Awareness by Population	90MM	140MM	-50MM
Likability by Population	54MM	45MM	+9MM

US General Population, Among Aware, Age 13-64

Awareness and likeness don't have a symbiotic relationship, which is why it's worth digging deeper to understand likeability.

What do Joanna Gaines, Cristiano Ronaldo, and Lionel Messi all have in common?

If you've yet to hear of the hit TV show Fixer Upper, you're missing out. Joanna Gaines has quickly become a household name through her hit TV show, recently launched Magnolia Network, décor and cookbooks, design line, and the real estate that her and business partner and husband, Chip Gaines, have developed in Waco, Texas.

Across the pond, there are a few superstars who have quite literally created hundreds of iconic moments in history for the beautiful game. Cristiano Ronaldo and Lionel Messi have long been considered two of the greatest footballers of all-time, with impressive line-ups of partnerships that they've developed along the way.

[1] Photo: Larsen & Talbert Photography/HGTV

[2] Photo: Shutterstock

[3] Photo: Shutterstock

So, what do a home and lifestyle icon and two of the greatest footballers of all-time have in common? Well, they each carry some of the strongest interest scores across the US with more than 1 in 2 Americans, among those aware, interested in them and what they do.

Awareness & Interest Comparison

Metric	Joanna Gaines	Cristiano Ronaldo	Lionel Messi
Awareness	60%	60%	54%
Interest	49%	52%	53%

% of US Residents, Among Aware, Age 13-64

Understanding the extent to which consumers have a legitimate interest in a personality reveals opportunities to deepen engagement through partnerships, and those opportunities exist abound beyond the world of sport.

The (arguably) three best hockey players in the world are sitting at a coffee shop...

The National Hockey League may not be the top performing sport league in the US, but it is certainly a premier property engaging more than 93MM Americans in the past 12 months.

Now, consider three of the best hockey players of all-time from competing teams. Two Stanley Cup Champions and one very much still on the hunt. You walk into a coffee shop and you see Nathan MacKinnon (Colorado Avalanche), Alex Ovechkin (Washington Capitals), and Connor McDavid (Edmonton Oilers) all sitting at separate tables...who would you want to meet? It may surprise you to find out that Connor McDavid is the celebrity most Americans would want to meet. With 44% of consumers aware of McDavid stating they'd be interested in meeting him, he tops the charts among his direct competitors, as well as other celebrities within, and beyond, sport.

Brands, properties, and agencies are getting creative with how they activate their celebrity and influencer partnerships, which is more reason to consider whether consumers truly want to meet them. If you're planning on leaning in to meet and greets or money-can't-buy experiences with a personality, this is one you'll want to measure.

[1] Photo: Seth McConnell, The Denver Post

[2] Photo: Michael Miller/Wikimedia Commons

[3] Photo: All-Pro Reels/Wikimedia Commons

The Stewie 1 Quiet Fire, Air Jordans, and what it means for generating impact

In 1984, Michael Jordan was drafted third overall by the Chicago Bulls of the National Basketball Association and by April 1st, 1985, the very first Nike Air Jordan shoes were launched. It was almost immediately after being drafted that Nike and Jordan came together. In 2021, sales of Nike's Jordan line exceeded $5 billion USD for the year, representing 11% of the company's total revenues.

Fast forward to 2021, Breanna Stewart, star of the Seattle Storm in the Women's National Basketball Association, signs a shoe deal with Puma. A few weeks ago, Stewart and Puma together launched their first signature shoe, the Stewie 1 Quiet Fire. This is the first signature shoe deal out of the WNBA in the past decade.

[1] Photo: houseofheat.co

[2] Photo: sneakerbardetroit.com

Brands generally look to partner with personalities who can deliver impact, in the form of purchase consideration or favorability. That said, not all celebrities or influencers lend themselves to achieving these objectives.

Michael Jordan is the top ranked celebrity at generating impact for brands, with 35% of those aware stating that they support brands he partners with. Breanna Stewart is right on his heels with 31%of those aware of her stating support for brands she partners with.

Support for Brands Celebrities Partner With

Metric	Michael Jordan	Breanna Stewart
Awareness	96%	36%
Support Brands	35%	31%

% of US Residents, Among Aware, Age 13-64

While the impact of association for both superstar athletes is strong, partnerships will inevitably come at different costs. Having the context above sets the stage for us to dollarize the potential before entering a partnership.

Who's climbing the charts?

On June 30, 2021, the NCAA voted to allow college athletes to benefit from name, image and likeness (NIL) opportunities, no matter where their school is located. Through one year of NIL, the industry pulled in $917 million USD, and is now projected to surpass a billion in its second.

Athletes, like LSU gymnast Olivia Dunne and UConn basketball player Paige Bueckers, are among the top college athletes who've been able to capitalize on the introduction of NIL by signing several brand partnerships. Dunne has signed deals with brands like Linktree, Vuori, American Eagle, and PlantFuel to name a few, while Bueckers made history signing the first NIL deal to join team Gatorade, as well as partnerships with StockX and Chegg.

With the introduction of NIL, and the ever-changing landscape of pop culture and the influencers within it, the importance of measuring momentum and growing interest in celebrities is more important than ever before. Comparing G.O.A.T candidates in their respective fields to top NCAA athletes who have successfully generated NIL sponsorships over the past year stresses the point.

Comparison of Growing Interest in Celebrities

Quinn Ewers	Olivia Dunne	Bryce Younge	Paige Bueckers
+31%	+26%	+24%	+23%
Tiger Woods	**Tom Brady**	**Novak Djokovic**	**Lebron James**
+7%	+10%	+11%	+12%

% of US Residents, Among Aware, Age 13-64

Bringing it all together: NBA Stars of Today, Yesterday, and Tomorrow

At this point in your read, you've hopefully had a few ah-ha moments, paired with a few 'I knew its'. Relying solely on impressions and reach without additional consumer context can be a slippery, and costly, slope.

Let's break down our final case study that looks at three NBA stars. If reach is what a brand is after, Lebron James appears like a solid candidate at first glance. But, is he the right candidate? He performs lower on all other key metrics relative to his fellow basketball stars. Michael Jordan offers the same reach and comes with stronger likeability and impact potential. But let's not forget about Cade Cunningham. While he doesn't (yet) have the same reach, he has the strongest current and growing interest. Brand objectives vary greatly, which is why it's paramount to have a holistic view of how influencers and celebrities perform across key metrics.

	Lebron James	Cade Cunningham	Michael Jordan
Awareness	209MM	81MM	210MM
Likeness	43%	42%	51%
Interest	37%	45%	39%
Interest in Meeting	32%	33%	35%
Support for Brand Partners	24%	31%	35%
Growing Interest	12%	24%	10%

% of US Residents, Among Aware, Age 13-64

SponsorPulse Celebrity & Influencer Scorecards

Similar to an athlete's Player Card with all of their key stats, SponsorPulse's Celebrity and Influencer Scorecards offer all the key quantitative insights you need to make informed sponsorship decisions. Visit www.sponsorpulse.com and get in touch today to learn more about our approach, read more case studies, or chat with our sales team.

Insights in this report are gathered from a study of n=2,961 US residents aged 13-64, representative of the US population, who were surveyed online in July 2022. Population sizing is based on data from the U.S. Census Bureau.

Endorsement Opportunity
Dwayne Johnson

Dwayne Johnson is the most well-known celebrity, with 98% of US consumers aware of who he is

Awareness	192MM
Likeness	121MM
Interest	77MM
Interest in Meeting	78MM
Support for Brand Partners	42MM
Growing Interest	24MM

% of US Residents, Among Aware, Age 13-64

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Endorsement Opportunity
Serena Williams

27% of consumers aware of Serena Williams support brands that partner with her

Awareness	180MM
Likeness	81MM
Interest	63MM
Interest in Meeting	50MM
Support for Brand Partners	49MM
Growing Interest	20MM

% of US Residents, Among Aware, Age 13-64

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[1] Photo: Shutterstock

[2] Photo: Shutterstock