## INFLUENCER INDUSTRY INSIGHTS

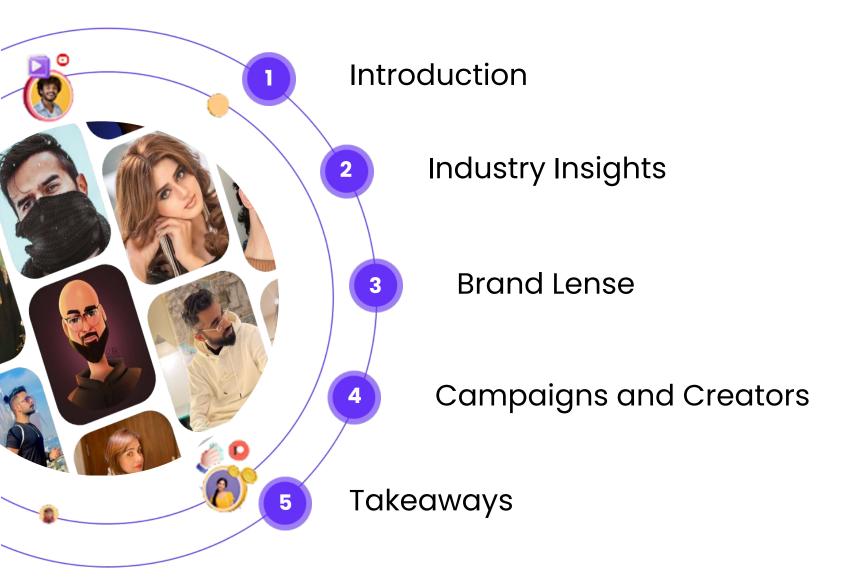
**PAKISTAN REVIEW** 

2021-22





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#### **ABOUT WALEE**

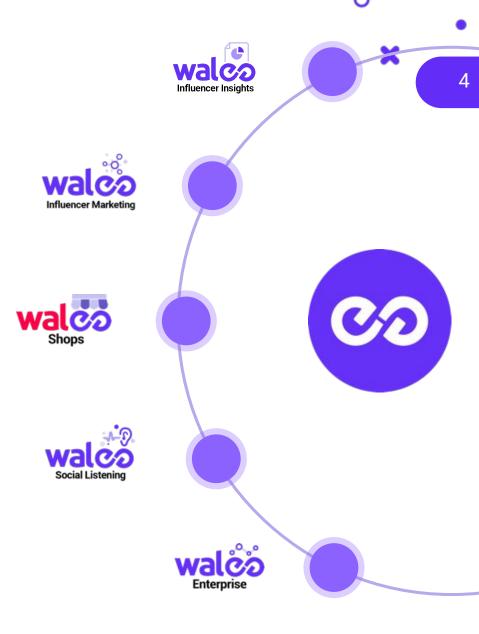
#### INFLUENCER MARKETING AND DIGITAL MANAGEMENT at SCALE



Our vision is to innovate new ways for brands, agencies and content creators to work together to market, sell and serve shoppers

Walee's **Al-driven solution** helps businesses and influencers to **market and sell** products via social channels and Walee Shops

Launched in 2019, Walee has quickly become Pakistan's fastest growing and leading influencer marketing and social commerce ecosystem, trusted by leading global and national brands with 10,000+ collaborations





# INTRODUCTION

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#### THE POWER OF INFLUENCE | CRISTIANO RONALDO 516 MLN FOLLOWERS

"When Cristiano Ronaldo moved two bottles of Coca Cola out of shot during a pre-game press conference last year, before encouraging people to rather drink water,

#### \$4 billion was wiped off the soft drink giant's market value

- Perfectly demonstrating the massive power he and celebrities like him have over public opinion."





BUDAPEST, HUNGARY - JUNE 14: Cristiano Ronaldo of Portugal speaks to the media during the Portugal ... [+]UEFA VIA GETTY IMAGES



#### INTRODUCTION

Pakistan's First Influencer Industry Insights Report 2021-22

We're delighted to present **Pakistan's first Industry Influencer Insights Report to identify Top 10 performers** on dimensions ranging from, brands' industries, campaigns, and content type, to influencers and gender-context, derived by using Walee's Al-powered social listening and insights tools that analysed more than **7 million data points** over 12 months of Instagram data.

With the **US\$104 billion global creator economy** rapidly growing and more than 2,000 service and system providers, marketers continue to seek tools and processes to improve campaign performance, aiming to strike it big by cracking the "viral code."

As Pakistan's largest and fastest growing creator ecosystem player, we're constantly on the lookout to add value to our clients, supporters and partners work, whether as brands, influencers, agencies or media partners. This data-first industry report should provide the latest highlights about the marketplace – like which campaigns or collaborations perform better based on data, versus relying solely on an opinion leader's "gut" feel.

Taking a fresh perspective, on data between 1 August 2021 to 31 August 2022 for 1,000+ Instagram campaigns and brands, we focused on brands' content – whether paid, non-paid or earned – in English, Urdu and Roman Urdu. To hear practitioners' context, we asked selected experts to share their interpretation of findings.

This report is **only the start** as we continuously evolve our intelligence suite to help identify opportunities. Join our journey and share your **feedback to marketing@walee.pk** and request a meeting to learn how we can help.



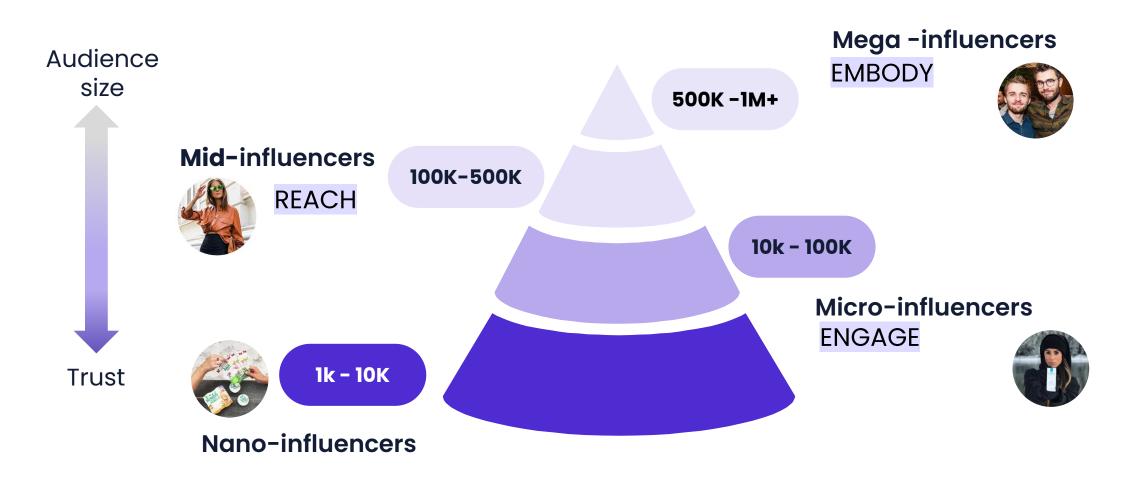
From all of us@Walee, happy reading!

Muhammad Ahsan Tahir CEO, Walee Dubai \* Islamabad \* Karachi \* Lahore



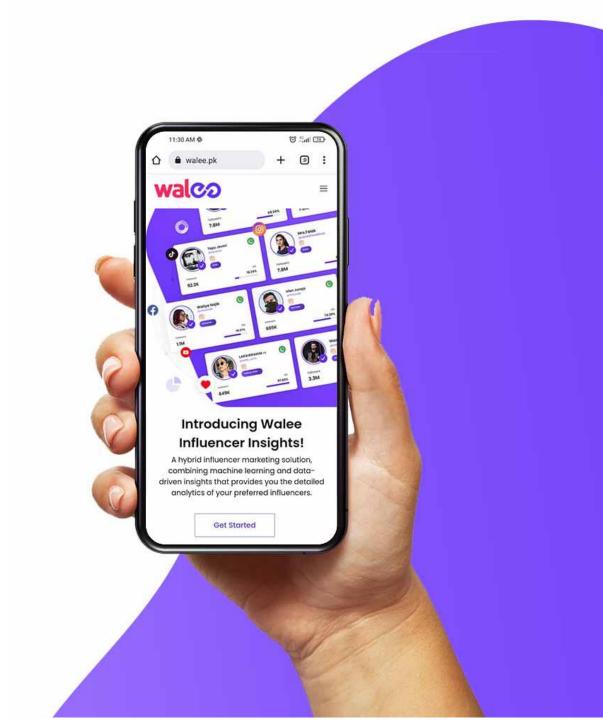
#### **INFLUENCER DEFINITION**

From passionate consumers to social celebrities, influencers vary in their ability and scale





## SNAPSHOT OF THE REPORT







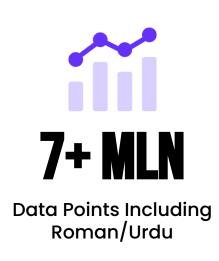
#### Brands | Industries | Campaigns | Influencers





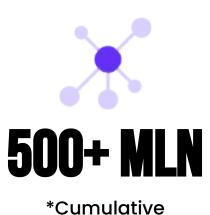


















Influencer Reach





#### **GLOSSARY**

Abbreviations, terms and definitions

Average Engagement Rate (AER) | The average rate taken of the individual engagement rates over a series of selected content

**Campaign** | Organized course of actions with a purpose, such as promote or sell a product, service or bring awareness to a topic, activity or cause

Creators | Individuals making content in any digital format, - graphics, blogs, videos, games - that can be distributed on channels, such as TikTok, YouTube, Meta, LinkedIn, websites and more

Consumer Packaged Goods (CPG) | Classification for everyday consumable products by a typical consumer e.g, food items, beverages, makeup, households

Engagement Rate (ER) | Level of engagement that a piece of created content is receiving from an audience.
Engagement includes LCS & Video Views, per META benchmarks

Genre | Another term for niche

Industry | Refers to the business industry in which the brand operates e.g., Fashion, Media, Beauty

Influencer Marketing Campaign (IMC) | Influencer marketing involves a brand, whether a product, people or cause, collaborating with a digital influencer to market or sell its products or services

Major Campaign | Where a campaign has at least ten associated influencers

**Niche** | Classification describes the speciality content or topic, usually associated with an area of interest or expertise e.g., Food, Lifestyle

**Pictures** | Non-moving images and includes photos, graphics, drawings and pictures

Videos | Any content format that includes moving images such as video. Common examples include vlogs, animation GIFs, recorded live streams, movies.



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## INDUSTRY INSIGHTS



#### TOP 10 INDUSTRIES WITH MOST INFLUENCER CAMPAIGNS

Industries with brands with major influencer campaigns

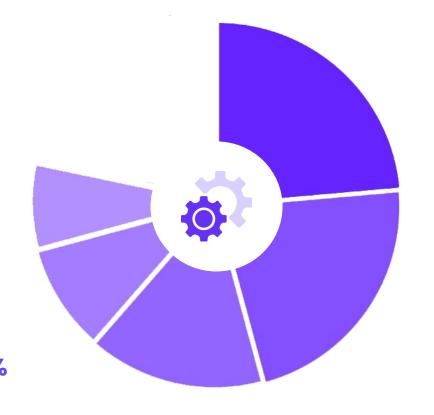
Fashion 23.6%

Beauty 22.2%

FMCG 15.6%

Lifestyle 9.4%

Entertainment 7.5%

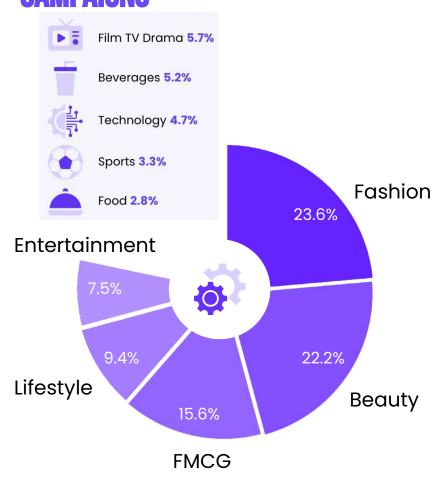






#### **TOP 10 INDUSTRIES**

## WITH MOST INFLUENCER CAMPAIGNS



### Industries with brands actively running major influencer campaigns

The largest share of the list's combined major campaigns accounted for about 60% of the pie and were Fashion (23.6%), Beauty (22.2%) and FMCG (15.6%). The difference between the highest to the lowest usage of major influencer campaigns on the list is 88%, or nearly a factor of 10. The commonality between the listed industries using influencer campaigns is they provide low involvement purchase goods/services and on average, lower valued products/services, compared with other industries.



#### Sundus Shahid Bari, Associate Director at Blitz Advertising

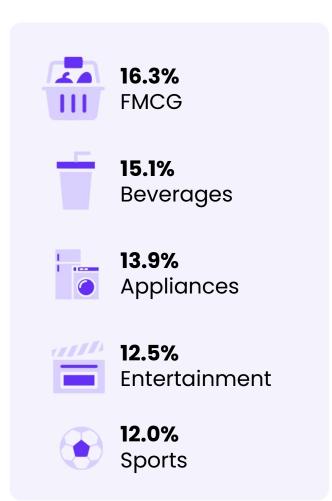
"This reflects the interests of our audiences as to what catches their attention and interest more. Not only just the content that brand creates and promotes, influencers are playing a big role in making a brand success or a massive fail. Therefore, it is extremely important to be careful while opting for the pool of PR individuals."



#### TOP 10 INDUSTRIES with best performing influencer campaigns

Industries with best performing major campaigns by AER

|          | Transport     | 26.8% |
|----------|---------------|-------|
| (2)      | Telco         | 20.3% |
| <b>D</b> | Film-TV Drama | 18.1% |
|          | Fashion       | 17.7% |
|          | Beauty        | 17.3% |





#### **TOP 10 INDUSTRIES**

### WITH BEST PERFORMING CAMPAIGNS



#### Industries with the best performing major campaigns by average engagement rate

The industry with the highest performing major campaigns by AER was Transport (26.8%), then Telco (20.3%) and Film-TV Drama (18.1%). The AER range referencing the lowest was 12% (Sports) to the top, was nearly a factor of 2x, or a difference of 55.2%. The industries listed generally comprised low involvement goods and services – meaning they serve 'everyday' products and services versus highly-seasonal industries such as airlines.

#### Aisha Randhawa, PR lead at Starcom

"Engagement with transport industry campaigns shows how people might be looking for value-for-money with new offers and gimmicks they offer. Same goes for telcos; the consumer is thinking, how do I get more value by spending less? And then of course choosing a brand that is also endorsed by your favorite Influencer. Though I would also deepdive further through social listening and would analyze if these sentiments and engagements led to positive or negative outcomes - that's where it gets tricky and will tell us the real story!"



#### TOP 10 INDUSTRY CAMPAIGNS BY MOST FEMALE REPRESENTATION

Industries with the best major campaigns featuring at least one female influencer



Airline **96.8%** 





#### **TOP 10 INDUSTRY**

### CAMPAIGNS BY MOST FEMALE REPRESENTATION







Home & Furniture



Health



Furniture **92.3%** 

#### Industries with the best major campaigns featuring at least one female influencer

The Top 10 Industries with major campaigns with female influencer representation was led by Airlines (96.8%), tailed closely by Home & Furniture (94.7%) and Health (93.1%). Agriculture (60.6%) had the lowest representation of females on the list and has 37% less representation than the top listed industry – however, at 60%, still shows strong general usage of females in campaigns.

#### Mehwish Aslam, Chief Business Officer at bSecure

"Female influencers have the power to rewrite the rules of beauty and fashion from skinny, fair and flawless women to "any women is beautiful." I can count so many such concepts revised, thanks to the influencers we see on our stories everyday. In the era where authenticity triumphs above all, female influencers add diversity and unique voices to brand messages and values that easily resonate with the public."



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#### TOP 10 INDUSTRY CAMPAIGNS WITH MOST MALE REPRESENTATION

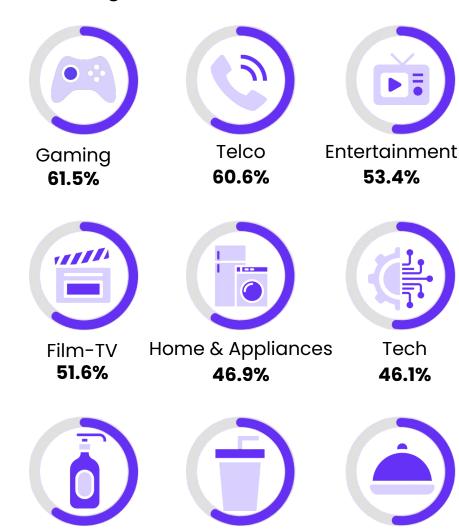
**FMCG** 

45.6%

Industries with the best major campaigns featuring at least one male influencer



Sports **75.3%** 



Beverages

45.1%

Food

44.8%



## TOP 10 INDUSTRY CAMPAIGNS WITH MOST MALE REPRESENTATION





61.5%



Telco **60.6%** 



Entertainment **53.4%** 

#### Industries with the best major campaigns featuring at least one male influencer

The Top 10 Industries featuring at least one male influencer in their campaigns, were Sports (75.3%), Gaming (61.5%) and Telcos (60.6%). The list's range from the top to the lowest ranked, Food (44.8%), was 30.5%. Compared with female influencer representation by industry, general male representation is significantly lower – for females' top position, it was 96.8% versus 75.3%



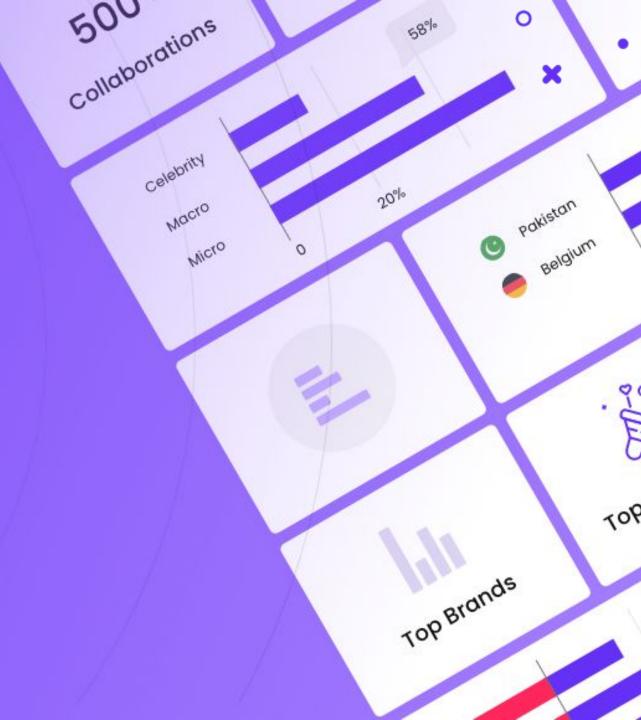
#### **Batool Ahmed, CEO of The Story Tellers**

"Women aren't early adopters of technology whereas males' involvement, knowledge, and purchase decision in mobile phones, appliances, financial products, digital devices, and telecommunication is well-established in our society. Though females are pacing up and leading the decision-making process, the difference in buyer and user still prevails. The majority of mobile devices in households are purchased by male members, or purchased with male members of the family. Either way, a male is a part of the purchase process - it can be her father, husband, brother, or her not-so-mature teenage son."

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BRAND LENSE

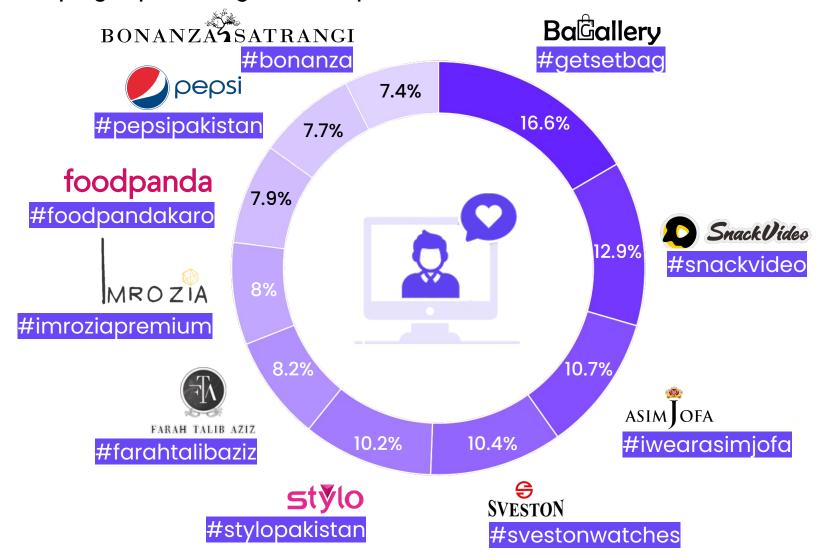
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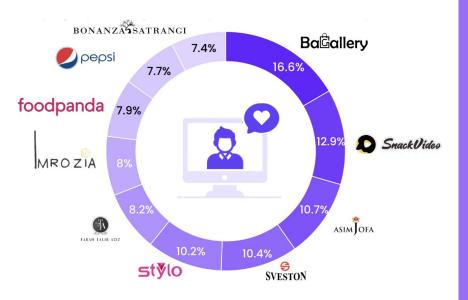
#### TOP 10 CAMPAIGNS GENERATING MOST CONTENT

Major campaigns producing the most posted influencer content





## TOP 10 CAMPAIGNS GENERATING MOST CONTENT



#### Major campaigns producing the most influencer content

The most influencer content generated by any major campaign was Fashion brand Bagallery (#getsetbag), taking 16.6% of the Top 10 group's total number of posts. The range between highest to lowest performing campaign, with Bonanza Satrangi (#bonanza), is 55.4%. The Top 10 list is dominated by Fashion with 6 top performing campaigns, followed by one campaign each for Lifestyle, Beauty, Beverages and Entertainment.

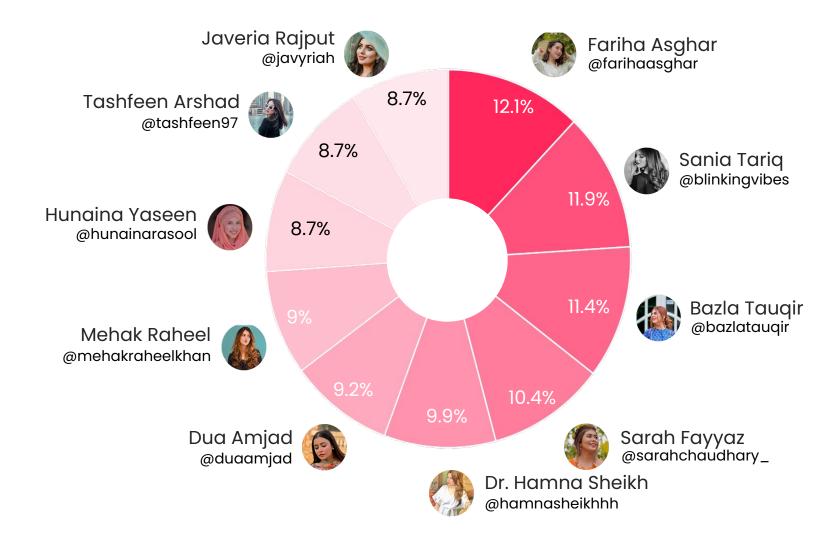


#### Babar Khan Javed, Director at Z2C Limited

"These are all low involvement products and a reflection of what the Pakistan audience on Instagram can afford – and that is they favor brands that help them tell a story about themselves. Having raised USD 4.5 million in Series A, Bagallery unleashed a wave of content that created 'FOMO.' Kuaishou spent the better part of FY 2022 by paying creators to publish their UGC on SV and then cross-post it on Instagram with the SV hashtags and logos in plain view. Whether this worked or not is a different story. Needless, the data adds up."

#### TOP 10 FEMALE INFLUENCERS BY MAJOR CAMPAIGNS

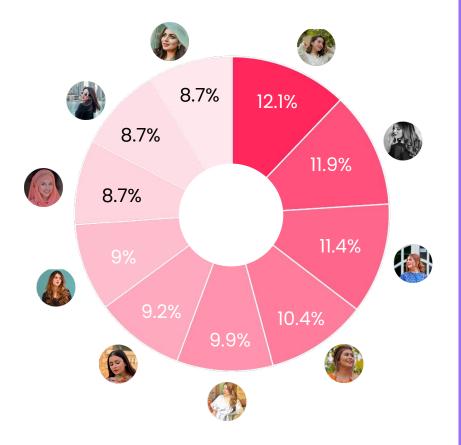
Female influencers with the highest share of most number of major campaigns in Top 10 list





## TOP 10 FEMALE INFLUENCERS BY MAJOR

#### **CAMPAIGNS**



#### Female influencers with the highest share of the Top 10 list

The Top 10 female influencers list is led by Fariha Asghar (@farihaasghar) with 12.1% of the list's combined campaigns, closely followed by Sania Tariq (@blinkingvibes) at 11.86% and Bazla Tauqir (@bazlatauqir) at 11.38%. Follower numbers did not necessarily generate more major campaigns as seen by Javeria Rajput (@javyriah) who was the lowest on the list, but the fourth highest number of followers at 364,812.



#### Mehwish Aslam, Chief Business Officer at bSecure

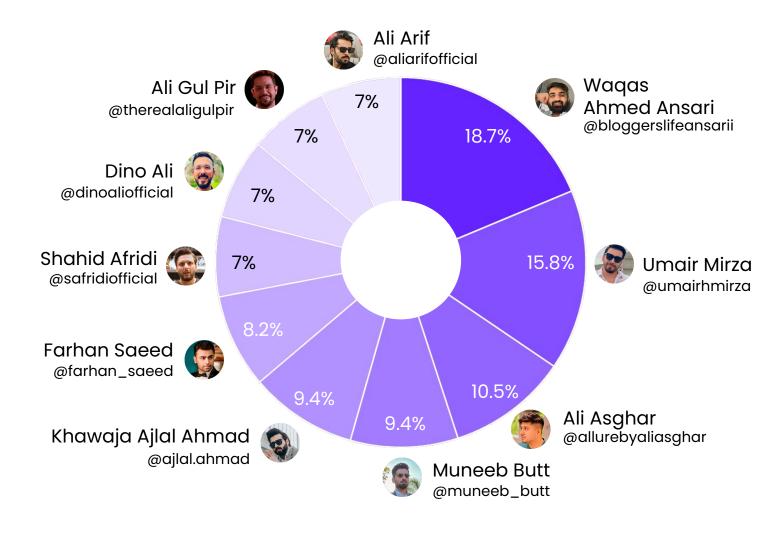
"The power of female influencers is not just about the number of followers they have, it is about the authenticity, engagement and connection they establish with their audience. They seek and trust other women's opinions more. Since they share more stories on social media, they tend to instill more emotional value to a product or message. They connect with their audience, something far more useful than plain old ads. Brands leverage this storytelling experience, which is a two-way communication process compared to traditional ads."



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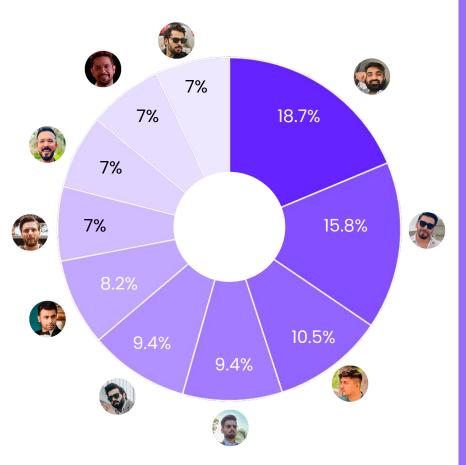
#### TOP 10 MALE INFLUENCERS BY MAJOR CAMPAIGNS

Male influencers with most number of major campaigns, share in Top 10 list





## TOP 10 MALE INFLUENCERS BY MAJOR CAMPAIGNS



#### Male influencers with the highest share of Top 10 list's major campaigns

The leading male influencer with the most major campaigns is Waqas Ahmd Ansari (@bloggerslifeansarii) who has a 18.7% share all Top 10 major campaigns, but the least follower numbers at 33k. Second ranked was Umair Mirza (@umairhmirza) with 15.8% share and 40k followers and Ali Asghar (allurebyaliasghar) with 10.5% of total campaigns and 103k followers. Only three listed influencers had more than one million followers – Muneeb Butt (@muneeb\_butt) with 4.2 mln in fourth place, Farhan Saeed (@farhan\_saeed) with 3.5 mln and in sixth place and Shahid Afridi (@safridiofficial) 3.1 mln at seventh place.



#### Rauff Hanif, Business Journalist at Aurora

"Encouraging to see leading advertisers and agencies selected influencers based on the Walee database ranking creators based on their quality score and reach. If this showed TV celebrities – who are represented by PR agencies that arrange millions of fake followers for them – this report would lose all credibility. Nice to see non-household names in this chart, all of whom have resonance with Gen Z."



#### TOP 10 CAMPAIGNS with only female influencers

Represents ~17% of all major campaigns analysed





#### **TOP 10 CAMPAIGNS**

### WITH ONLY FEMALE INFLUENCERS



#### Influencer campaigns with only female representation

The Top 10 major influencer campaigns with all-female representation accounted for 17% of all major campaigns analysed. Two brands with two positions in the Top 10 list were FMCG's Always (#alwaysazad, #longestpadlongerdreams) and L'Oréal (#revitaliftserum, #lorealhaserum). The other Top 10 major influencer campaigns with female-only representation were from four industries - Beauty (50%), FMCG (20%), Fashion (20%) and Home & Furniture (10%).

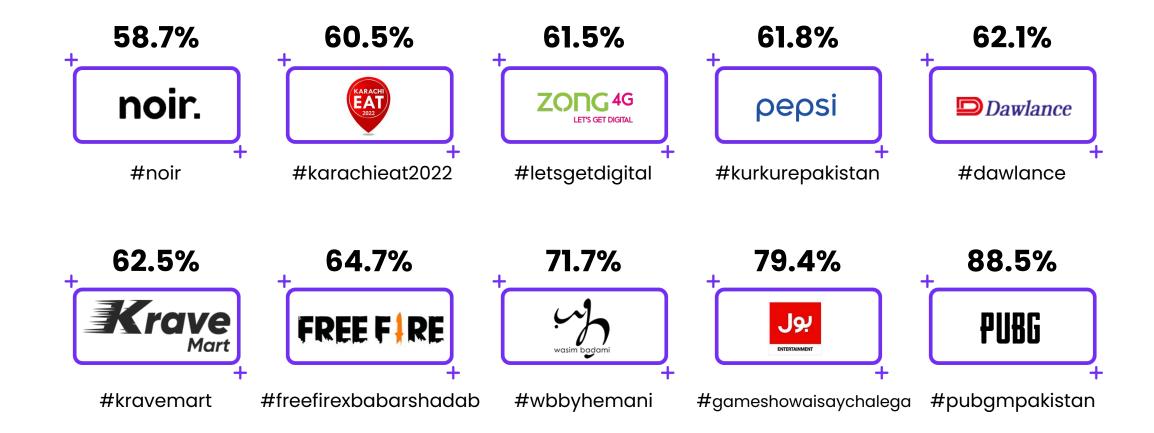


#### Usra Murtaza, PR Strategist at one8nine Media

"As evident in the report, female influencers have been able to position themselves as opinion leaders in the mentioned categories. As unfortunate as it maybe, the advertising industry has always worked around females — for more reasons than them just being the end-user. However, now, we can imagine a male voice advocating for FMCG's like Always, raising awareness around the taboo, or talking about fashion, beauty, home, and furniture — as it is part of their lifestyle too. It can create so much impact and can change the entire future dynamics. So, if there is anytime to start shifting perspective, it is now."

#### TOP 10 CAMPAIGNS with male influencers

Top 10 campaigns with at least one male influencer





#### **TOP 10 CAMPAIGNS**

#### **WITH MALE INFLUENCERS**



#### Top 10 campaigns with at least one male influencer

The Top 10 major campaigns with at least one male influencer was led by PUBG (#pubgmpakistan) with 88.5% representation, followed by Bol Entertainment (#ghameshowwasisaychalega) with 79.4% and beauty brand WB Hemani (#wbbyhemani) for 71.7%. The list covers seven industries of which two each have two brands - Gaming, Beauty and Food - and the remaining are singles, Film-TV Drama, Home & Appliances, FMCG and Telco. The lowest representation of male influencers was Noir (58.7%).



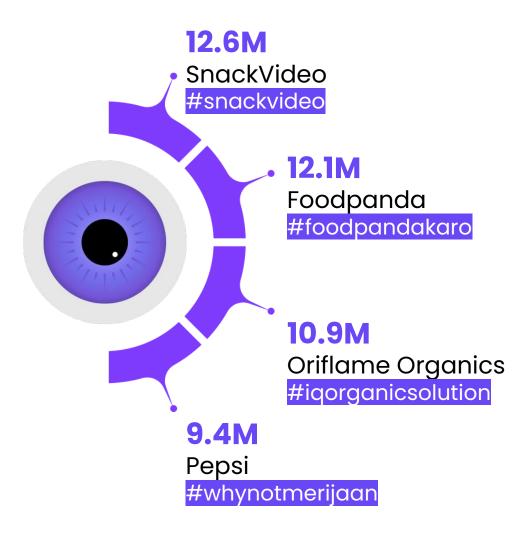
#### Sidra Latif Khan, Brand Manager at Alkaram Studio

"First-person shooter games are predominantly played by male tweens and teenagers, so the selection of a male content creator to campaign for PUBG and FreeFire makes sense amid their audiences and the subject matter expertise needed. The remainder products are geared towards boys and the game show on BOL featuring models that are meant to serve as easy ratings bait. The data adds up."



#### TOP 10 CAMPAIGNS BY VIDEO VIEWS

Top 10 major campaigns by number of video views





Always #alwaysazad Master Molty
Foam | #aslifoam

7.9M

6.4M

Stylo #stylopakistan 5.5M

PEL #pel

4.9M

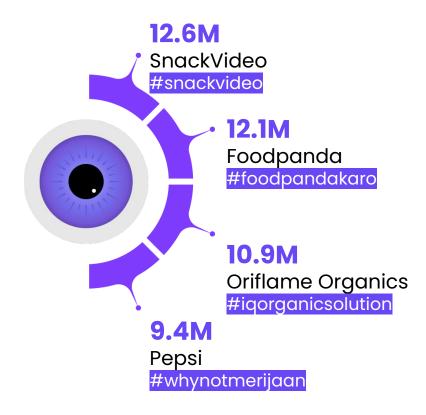
Sapphire #sapphirepk

4.6M

Asim Jofa #iwearasimjofa



## TOP 10 CAMPAIGNS BY VIDEO VIEWS



#### Top 10 major campaigns by number of video views

The Top 10 campaigns with the most video views on Instagram as of August-end 2022 was Snack Video (#Snackvideo) with 12.6 mln views, or 15.1% of the combined list's views. The range of the most to the least views on the list was 4.6 mln to 12.6 mln, a difference of 8 mln, or 63%. The Fashion industry dominated the list taking three spots with Stylo (#stylopakistan), Sapphire (#sapphirepk) and Asim Jofa (#iwearasimjofa), with a combined 15.9 mln views.



#### Urooj Javed, Senior Creative at Ogilvy Pakistan

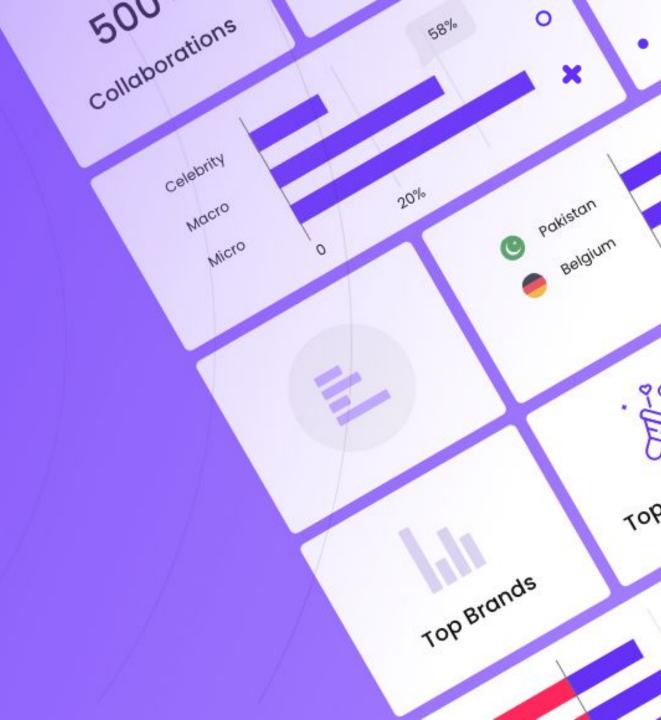
"In its quest to grow its creator-user base, Kuaishou offered creators cash incentives to use the SnackVideo platform for their new content, which was then downloaded and cross posted on platforms such as Instagram with the relevant hashtags. This helped raise awareness for the Chinese platform. So this data adds up. Foodpanda through Starcom and PepsiCo through Mindshare have strong media buying power, so their presence here resonates with the audience of Instagram and their interests in low-involvement products."



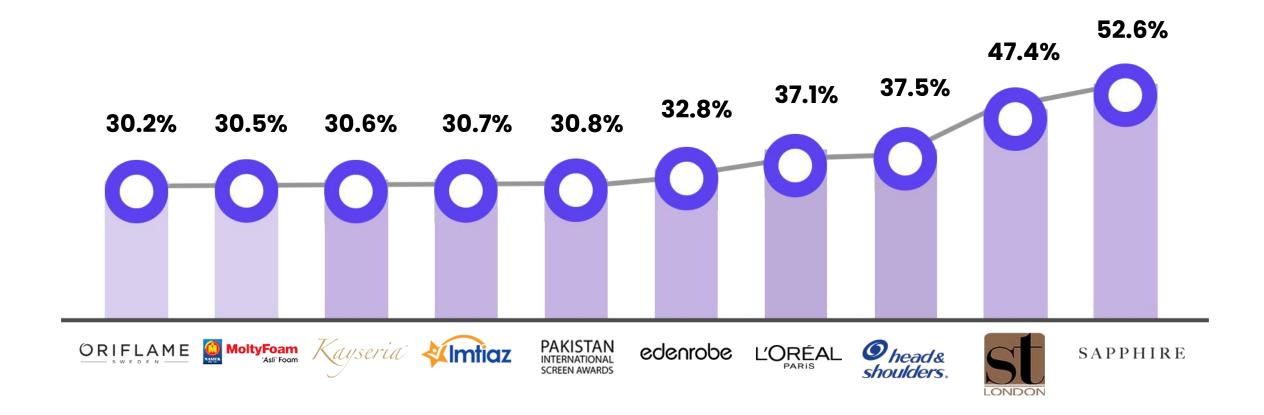
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## CAMPAIGNS AND CREATORS

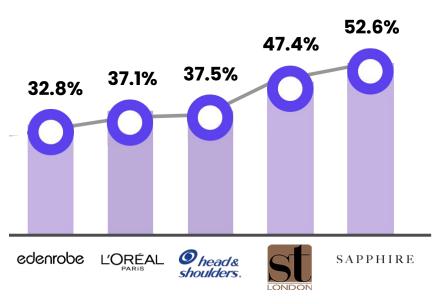


## TOP 10 BRANDS BY CAMPAIGN ENGAGEMENT RATE A brand's AER across the content of all its major campaigns





## TOP 10 BRANDS BY CAMPAIGN ENGAGEMENT RATE



#### A brand's average engagement rate across all its major campaigns

The Top 10 major campaigns by AER of brand content ranged from 30.2% to 52.6%, a difference of 22.1%. The list was dominated only by two industries – six spots were Lifestyle and the remainder with Fashion. The top two positions with AER's of more than 45% were Fashion brand Sapphire, and Beauty brand ST London (47.4%).



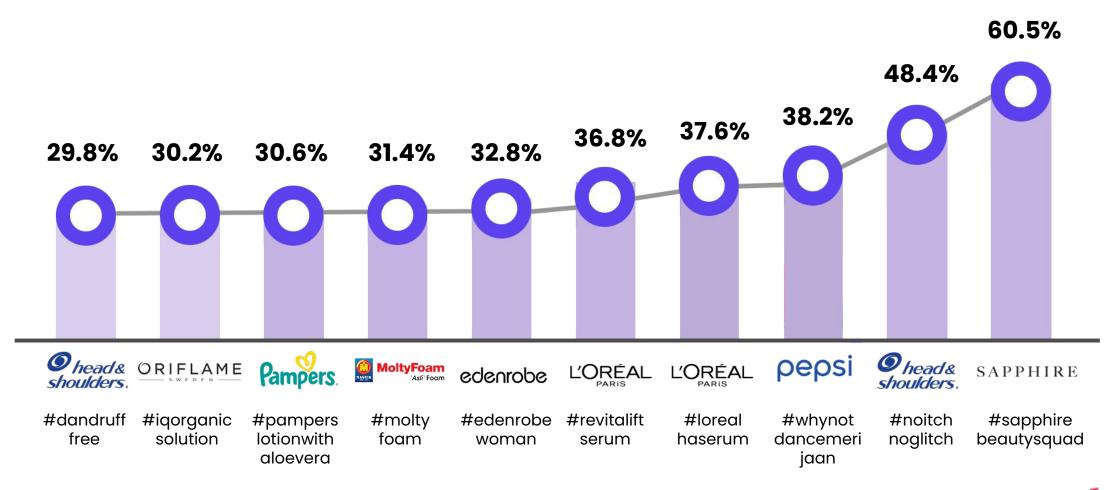
#### Quratulain Rashid, Influencer Performance Lead at Walee

"When designing for campaigns, clients are always looking for inspiration and best practice and that's where these stats prove useful - they provide who are top runners by way of recent consistent engagement, and a benchmark for what would be considered a good engagement rate. For example, emerging fashion brands can study Sapphire's playbook by way of the influencer selections, captions, hashtags and content. Walee's Influencer Insights dashboard provides deepdive reports for individuals and covers various content analytics - clothing choices, environments and a slew of other attributes to support marketeers in making data-oriented decisions."



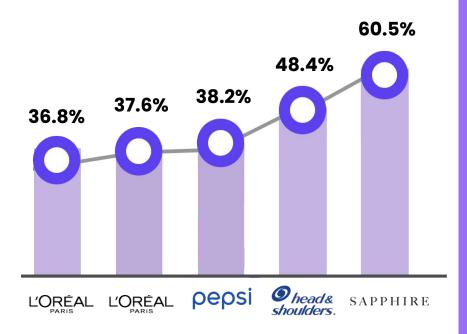
#### TOP 10 BRAND CAMPAIGNS BY ENGAGEMENT RATE

Top major brand campaigns by best AER of content





## TOP 10 BRAND CAMPAIGNS BY ENGAGEMENT RATE



### Top 10 major brand campaigns by best average engagement rate

The top 10 major campaigns with the best average engagement rate (AER) for posts is Sapphire (sapphirebeautysquad) with an AER of 60.5%, nearly double that of Oriflame (#iqorganicoslution) at 30.2% in tenth position. Only the L'Oreal master brands scored multiple high scoring AER campaigns with their #lorealhaserum (37.6%) and #revitaliftserum (36.8%) campaigns in fifth and sixth places.



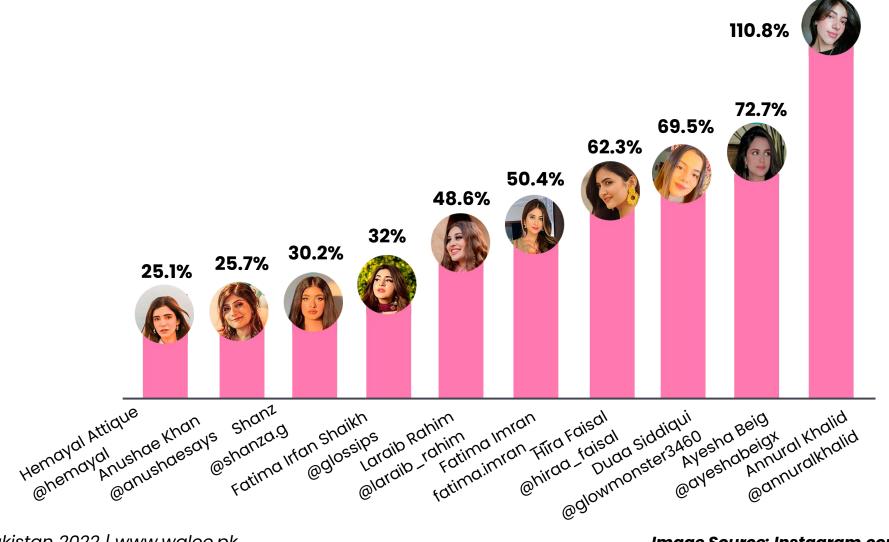
#### Aqib Iqbal, Head of PR at Digitz Digitas

"#LorealHASerum & #RevitaliftSerum was largely an advocacy campaign, and given our objectives, we selected fashion & beauty influencers with high engagement rates & audience demographics which were part of our core target audience. What made it most successful was that we ensured our product, Revitalift Hyaluronic Serum, became an integral part of the influencer's daily routine, which further increased brand credibility and in turn saw an AER of 37.6% & 36.8%."



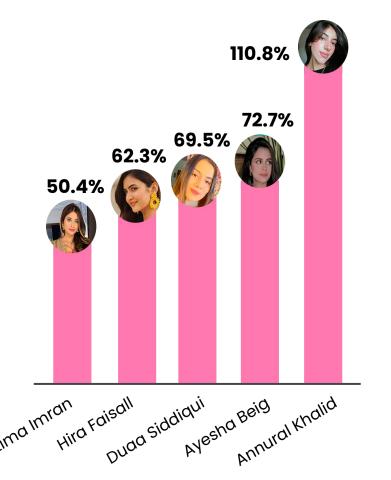
#### TOP 10 FEMALE INFLUENCERS BY CONTENT ENGAGEMENT RATE

Top female influencers based on best performing campaigns by engagement rate





## TOP 10 FEMALE INFLUENCERS BY CONTENT ER



#### Top 10 female influencer's by best performing campaigns by average engagement rate

Top 10 female influencers by the most recent best performing campaigns by AER ranged from 25.1% to 110.8%, a difference in range of 85.7%. In the top three positions by follower numbers is Annural Khalid (annuralkhalid) 224k followers, Ayesha Beig (ayeshabeigx) at AER 72.7% and 689k followers and makeup artist Duaa Siddiqui (glowmonster3460) with 222k followers with AER 69.5%. By August-end, the Top 10 lists combined follower number was 4.1 million, ranging from Shanz (@shanza.g) in eighth place with 52,489 followers to Laraib Rahim (@laraib\_rahim) with 784,721 in sixth position.

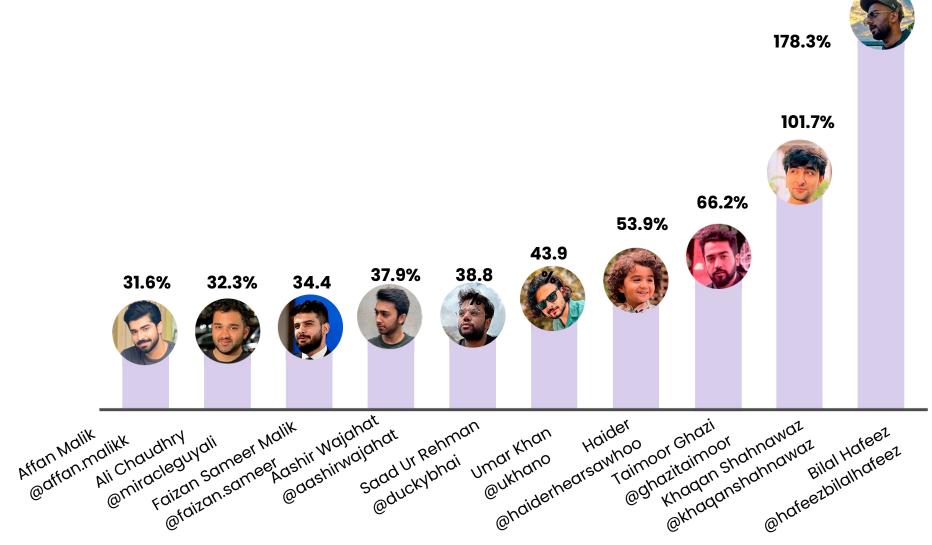


#### Rehan Khalid, Brand Manager Digital at Sana Safinaz

"A high number of followers is not the only metric to judge the 'Influence' of any profile, it's their 'Followers' AND their 'Average Engagement Rate'. In simple terms, AER refers to how many of those followers are actually interacting with your content and it displays authenticity & authority. For the Fashion industry, a high AER almost pre-defines the success of a campaign and undoubtedly, it's the female influencers who reign."

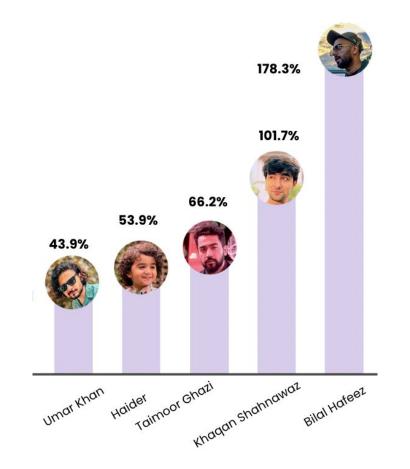
#### TOP 10 MALE INFLUENCERS BY CONTENT ENGAGEMENT RATE

Top male influencers based on based on best performing campaigns by engagement rate





#### TOP 10 MALE **INFLUENCERS BY CONTENT ER**



#### Top male influencers based on best performing campaign by AER

Top 10 male influencers with their best performing campaigns by AER ranged from 31.6% to 178.3%, a difference of 82.3%. In second position is Khaqan Shahanawaz (@khaqanshahnawaz) with AER 101.7% and Ghazi Taimoor (@ghazitaimoor) with AER 66.2%. The combined list's follower numbers was 3.1 mln, ranging from Hafeez Bilal's 23,600 to Saad ur Rehman (@duckybhai) with 1.3 mln placed sixth.

#### Samina Seth, COO at Walee

"Does gender make a difference? Varies by context. Pakistan has a lower number of 'established' male influencers compared with females, which translates to lower collaborations and given the relative scarcity, we expected their AER's to be higher - as the data supports. Brands can smartly feature males to support buying decisions, by generating interest, support and excitement to drive needs-based sales for female products. By using A/B testing, marketers can measure the true impact and help identify, rank and select the influencer and gender mix for campaigns, along with target profiles."



## 5 TAKEAWAYS

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#### TAKEAWAYS TO SUPERCHARGE CAMPAIGNS



**Experiment with influencer mix to optimise results** – is it better to take on an influencer with a million followers or 10 influencers with grassroot geographic penetration, and high engagement rates? Find what works for your brand.

2BENCHMARK KPIs

Performance differences by industry and brand - understand what is 'achievable' for the industry to design brand creator programs which support you and the influencer; isn't the influencer an extension of your brand?

FIND YOUR
BEST PRACTISE

**Use data to create your best practice** - fuel your campaign creation from influencer choice, profiles, hashtags and investment through historical and current data points. Can you trend & trailblaze?



#### **NOTES AND DISCLAIMER**

#### **Notes**

Walee Influencer Insight Reports are designed for you to confidently evaluate social influencers performance across Instagram, TikTok and YouTube covering a wide range of data points, such as audiences, engagement, and branded content, to analyse influencers both individually and between a range of peers.

For this report, we took primary Instagram sourced data for the period June 2021 to August 2022. The data addressed more than 1,000 unique known brands with all sized campaigns. "Major Campaigns," had at least ten associated influencers. Once report parameters were set, we extracted and analysed relevant tagged content posts in English, Urdu and Roman Urdu. Given the huge volume, at more than 7 million data points which covered a wide representative of more than 1,000+ influencers in Pakistan, we believe the findings are a fair representation of the overall influencer market.

#### Disclaimer

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