

Title: Influentials or Accidentals? Investigating Interpersonal Influence in the Telecommunications Market

Author: Sarah Macdonald

Abstract: Advocates of influencer marketing usually divide consumers into two broad groups: the influential and the influenced. By identifying those individuals who are the most highly connected and influential, they hope to harness these individuals' capacity for spreading positive word of mouth about products and brands. But does it make sense to divide consumers in this way? Is influence a mere function of network size and connectivity or is it more complex than that? Do factors such as product knowledge, interest in a product category or brand attachment affect how influential or easily influenced consumers are within a given product category? And how does this impact the way in which marketers communicate with consumers? Drawing on data collected in a global telecoms study, this paper investigates consumers' propensity to influence and be influenced by one another. It asserts that the influentials hypothesis provides an over-simplified view of how trends spread. While it is possible to separate those who are more influential from those who are not, interpersonal influence doesn't simply cascade through a social group. As not all consumers communicate about products and services in the same way, and rely on a variety of sources, marketers are unlikely to reach as many consumers as they hope by investing in key influencers. They should rather use their resources to provide the information that consumers are looking for to inform their purchase decisions. In this way, they will be better able to influence purchase intent in the technology sector and beyond.

The rise of influencer marketing

According to Keller, Fay and Berry (2007), influencers are “everyday consumers who are substantially more likely than average to seek out information and to share ideas, information and recommendations with other people”. Influencer marketing refers to the process of identifying and engaging with these influencers in support of a business objective (WOMMA, 2008).

Identifying and marketing to opinion leaders or “influentials” is not new. It has been around since at least the mid-1950s, when Larsfeld and Katz (1955) published their book, *Personal Influence*. The idea is that influence cascades through a market in a two-step process from influential consumers to those consumers who do not influence others. This pyramid-shaped model has been widely accepted by marketers, who invest a lot of time, effort and money on targeting the elite few at the very top (Smith, Coyle, Lightfoot & Scott, 2007). Over the years, influencers have come to be known by a variety of names including mavens, trendsetters, spreaders, alphas, Conversation Catalysts and e-influentials.

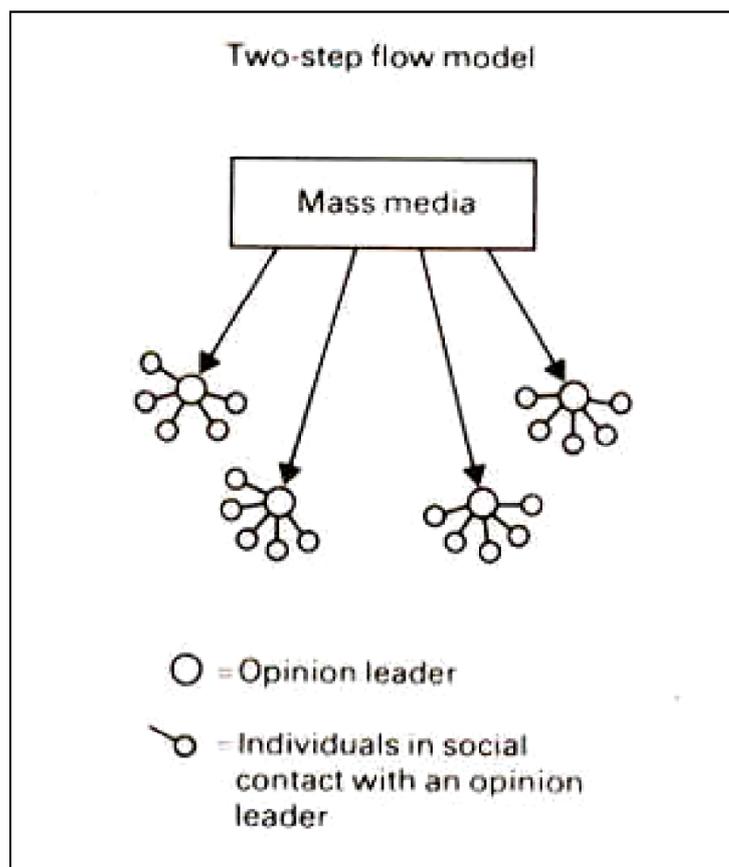


Fig 1. Two-step flow model (Source: Larsfeld & Katz (1955))

Since 2000, this idea has gained renewed interest, sparked in part by Malcolm Gladwell's bestseller, *The Tipping Point* (2000). In it, he reaffirms the idea that trends spread like epidemics through a society and maintains that it is the few highly influential individuals who act as the superspreaders of these trends.

This has come to be known as the influentials theory (or hypothesis) and it has two main tenets: firstly, that some people are more influential than others and secondly, that they are disproportionately important in getting a trend going.

The great appeal of this theory among marketers is better understood by taking the following into account:

1. The increasingly fragmented media landscape makes it more and more difficult for marketers to reach their target audiences on tight budgets.
2. There are concerns that consumers are so inundated with marketing messages competing for their attention that it's difficult for marketers to create messages that are impactful.
3. Consumers seem to be more savvy and mistrustful of marketing messages than ever before, valuing them less and less than recommendations from people that they know.
4. The huge hype around social networks, especially their potential ability to send information about a product or brand rapidly from person to person.
5. Highly credible User Generated Content (UGC), such as YouTube videos, competing with marketing messages for share of mind.

By identifying and targeting highly influential individuals, marketers are essentially looking for a shortcut. They are hoping that by persuading these select few of the merit of their products and getting them excited about their brands, that these influencers will then go out and spread the word to the masses of others who are supposedly under their influence. Some proponents of this theory even go so far as to suggest that these key influencers have an exponential effect on the spread of influence through a social group and that they are the 10% who tell the other 90% what to do (Keller and Berry, 2003).

Nothing more powerful than an idea whose time has come...

With such bold claims, it's not surprising that this theory has generated a lot of interest and come under fire from a number of sources. Chief among the detractors is Duncan Watts, principal research scientist at Yahoo! Research and a former professor of sociology at Columbia University. In his paper, *Challenging the Influentials Hypothesis*, Watts (2007) argues that the "influentials hypothesis", while inherently plausible, suffers from ambiguous language, post-hoc reasoning and biased selection of events based on anecdotal evidence.

Watts agrees that more influential individuals probably do exist, but exactly how one goes about identifying these individuals can be problematic. While marketing research techniques exist which can be used to identify influencers, these usually make use of pre-defined criteria. For example, Keller and Berry (2003) note that within consumer markets, influencers are activists, are well-connected, have impact, have active minds, and are trendsetters. Other criteria are sometimes also used, including credibility, trustworthiness and various other attractive personality traits. Many of us can probably think of individuals who fit these descriptions, and their classification as influencers may seem intuitive. However, what is difficult to test empirically is whether or not these individuals do indeed exert influence on the consumption *behaviour* of others by persuading them to buy (or avoid) certain products or brands. Indeed, attempts to measure the impact of any word-of-mouth communication run into the same problem.

Watts is particularly critical of the second proposition of the influentials hypothesis – that highly influential individuals, no matter how they are defined, are disproportionately important in propagating trends. By using computer simulations, Dodds and Watts (2007) tested the influentials hypothesis in a number of social scenarios. What they found was that instead of influence spreading through a social group from person to person like a disease, the speed with which a trend spreads depends far more on conditions present in the environment. Watts makes use of the analogy of a forest fire, which relies more on conducive environmental conditions than a special spark to rage out of control. He asserts that if a society is susceptible to a certain idea, then almost anyone can start a trend. So in order to catch on, trends don't need a few highly influential individuals persuading everyone else, but rather a large group of easily influenced people influencing one another. This resonates with the findings of Smith et al. (2007) that "it is the moderately connected majority, not the much smaller number of highly connected people, who hold the greatest potential for influence".

While many of Gladwell’s stories of connectors, mavens and salesmen are compelling, they are largely anecdotal. If one traces back any social trend to where it began, there will inevitably be a few individuals who were there first. Influencer marketing seems to assume that those individuals who were involved in starting a trend are influential and that other persuasive people like them can be identified using a pre-defined set of criteria in much the same way as a personality test can help to tell the introverts from the extroverts. However, it doesn’t necessarily follow that those who were there at the beginning of a particular trend are influential people generally. Watts prefers to refer to them as “accidental influentials”.

So while influencer marketers invest a lot of effort into analysing past trends in an attempt to effect future outcomes, Watts maintains that social epidemics are mostly random.

Influencer marketing vs. the accidental influentials

The following table summarises the key differences between the views of influencer marketers, like Gladwell, and advocates of the “accidental influentials” view, such as Watts.

Influencer marketing	Accidental influentials
Those people who are more influential than others are disproportionately important in getting trends started	While some individuals may be more influential than others, they are not more instrumental in starting trends
The success of a trend depends on the influencers who spread it and the content of the message	The success of a trend depends on how receptive an overall society is to it, i.e. a critical mass of easily influenced people influencing other easy-to-influence people
The few (influencers) are more important than the many (non-influencers)	Anyone can start a trend
Trends spread like epidemics through a social group – individuals are instrumental in making them spread	Trends spread like forest fires – certain environmental conditions cause a trend to take hold and spread through a social group
Trends can be engineered	Trends happen at random

These two conflicting perspectives have sparked a lot of debate, both in the marketing community and beyond. Interestingly, an online article by Clive Thompson (2008) of Fast Company fuelled interest in the debate and caused a number of spin-off blog posts to spring up (Earls, 2008; Brown, 2008; Maki, 2008; Denny, 2008; O'Driscoll, 2008; Isakson, 2008.). These discuss the issue but don't come to any clear consensus.

So which of these two perspectives is right, or at the very least, more accurate?

The influencer marketing perspective is more popular and seems more intuitive, but is largely based on anecdotal evidence and post-hoc rationalisations. The argument from the accidental influentials corner is strong, but mainly based on simulations (as opposed to real-life experiments) which Watts himself describes as more like thought experiments that are more suitable for provoking questions than providing answers. Furthermore, while Watts invites criticism of his research methods and findings, the ability to access and scrutinise them remains outside the realm of most marketing researchers.

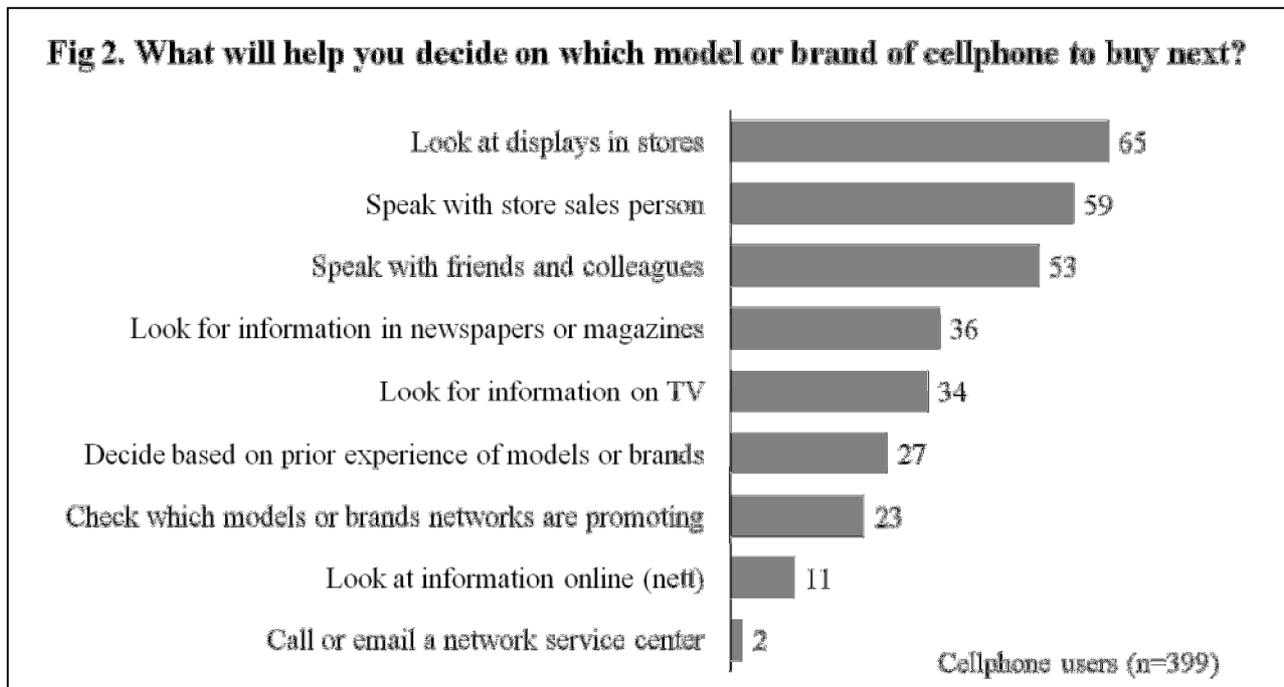
Research methodology

By using data collected in the Global Telecoms Insights (GTI) study, this paper will now investigate the phenomenon of interpersonal influence in the South African mobile telecommunications and technology market. GTI is an annual study conducted in 32 markets across the world. It draws a representative sample of the population aged 16 to 60. In South Africa, data is collected face-to-face using pen and paper, with a total sample of n=500 participants. For the purposes of this paper, the main dataset of n=500 was filtered on regular cellphone users, thereby reducing the total sample to n=399.

The main objective of the GTI study is to collect information on mobile phone and technology usage. Respondents are asked questions which explore their awareness, usage and purchase behaviour within the category. There are also a number of psychographic and demographic questions which can be used for profiling purposes.

Influence and openness

When respondents were asked which sources of information would help them to decide on which model or brand of cellphone to buy next, they gave the following responses:



Those who said that they would speak to friends and colleagues were considered to be “open to influence” (n=216), while the other part of the sample was considered to be “not open to influence” (n=187). Interpersonal influence in this context therefore specifically refers to word-of-mouth communication with people that the respondent knows personally. Typically, known peer influencers, such as family and friends, influence purchase decisions most directly and have a vested interest in those they communicate with (Razorfish, 2009.). Approximately half the sample is open to, if not actively soliciting, this kind of interaction pre-purchase.

On the other side of the equation, “influencers” (n=201) were defined as those respondents who said that the statement “my family and friends often ask my advice on which telecommunication products to buy” either described them perfectly or quite well. “Non-influencers” (n=198) were the remainder of the sample who said that the above statement does not describe them.

My family and friends often ask my advice on which telecommunication products to buy	Influencer		Non-influencer	
	This describes me perfectly	This describes me quite well	This doesn't really describe me	This is definitely not me
	13%	37%	31%	19%

Within this market, those who said that the above statement describes them perfectly could be considered “influentials” in a truer sense of the term (they also make up just over 10% of the market – the magic number for influentials). For the purposes of this paper, they will be referred to as “super influencers”.

Shining the spotlight on super influencers

Are super influencers different from other cellphone users in the market? One of the main things that sets them apart is their age – they are significantly younger (16 – 21 years) than everyone else in the sample and almost two-thirds of them are younger than 30. This makes them different in other ways as well. For instance, many of them are single and still at school or university, so they don't contribute to the household income. Perhaps due in part to their youthfulness, super influencers tend to be more carefree. They strongly agree with statements that show a pre-disposition towards being more fun-loving, thrill-seeking and risk-taking than others in the market. They enjoy new experiences and are attracted to brands that help them to have fun.

When it comes to their sociability and connectedness, super influencers are all that they're expected to be. They like to be in touch and keep up to date with what's happening around them. They are more social than average and are more likely to strongly agree that it's extremely important to be accessible to share in friends' special moments and to connect with people who have common interests and values.

One of the key characteristics of super influencers in the telecommunications market is that they absolutely love technology. They are significantly more likely to agree strongly that it's very important to have the latest technology. They tend to be more techno-savvy than others in their use of cellphone features and they show a disposition towards being early adopters. When it comes to describing their relationship with their cellphones, they are far more likely to choose the option “I like to try out new technology and therefore want to have a cellphone that is among the latest launched phones in the marketplace, with new and advanced features” over any other.

When it comes to their reported market behaviour, super influencers are different in other ways too. They are aware of more brands than others (both cellphone handset and social networking brands). They use more cellphone accessories than average and show a greater interest in purchasing more. They are more likely to strongly agree that they actively seek to change their handset from time to time and are also willing to pay more for technology. They are very involved in the product category and more likely to see their cellphones as an extension of themselves and a symbol of who they aspire to be.

Despite their awareness of more brands, super influencers aren't using different handset brands to others in the market. They are also not more attached to their brand of cellphone than others. Ninety-two percent of them are devoted to the brand of cellphone they use most often and 84% are single-minded in their choice of cellphone brand. However, when it comes to choosing their next cellphone, the model of the phone is slightly more important than the brand.

Expanding the circle of influence

From the above discussion, it's clear that super influencers really are quite different from others in the telecommunications market. What's interesting is that if we compare *all* influencers to all non-influencers, the differences between the two groups are even more pronounced. In fact, those who consider themselves to be influencers *at all* are significantly different from non-influencers across most measures in the dataset. In addition to many of the things which are true for the super influencers (such as their technophilia), influencers are more likely to be male. They also tend to be more concerned with getting the best possible phone, as opposed to the best possible price. They are even significantly more willing to participate in future research than non-influencers!

These findings illustrate exactly why the influential hypothesis is so compelling. If those people whom we turn to for advice on products and services are so fundamentally different from everyone else, then it appeals to our common sense that we will be able to separate them from everyone else in one way or another.

Speaking and seeking

Now let's consider the other side of the equation: the difference between those who said that they would speak to friends and colleagues to help them decide on which brand of cellphone to buy next (open to influence) versus those who did not (not open to influence). Interestingly, when we compare these two groups, very few meaningful differences emerge. They are not very different from each other in terms of demographics, psychographics, brand awareness, level of product knowledge, reported usage behaviour, interest in the category and sociability. What this means, in effect, is that it's very difficult to distinguish between those who are open to influence and those who are not.

The one measure that really differentiates them is the sources of information they plan to consult when deciding which cellphone to buy next. Those who are open to influence are significantly more likely to speak with the store sales person (in addition to their friends and colleagues), while those who are not open to influence are significantly more likely to make a decision based on previous experience, check which brands or models are being promoted and consult online sources. Despite no significant differences in measures of their sociability, those who are open to influence seem to prefer talking to others about their brand choice, while those who are not open to influence do not.

One possible reason for this is that those who are open to influence are more likely to agree with the statements "my life just keeps getting busier and busier" and "I rarely seem to have time to do the things that are really important to me in my life". This suggests that these people are more time poor than those who are not open to influence. A possible hypothesis is that consumers who have limited time are more likely to make use of shortcuts or heuristics. Instead of sourcing and looking through all the product information themselves, they talk to other people to find out what they know. In the case where a consumer is already clued-up on the product category, this may just serve to confirm what they already know or to provide assurance that they haven't missed anything prior to making a purchase decision.

The influence matrix

By cross-tabulating the influencer and non-influencer groups with those who are open to influence, an interesting picture emerges.

Fig 3. Influence matrix		Level of influence	
		Influencers (n=198)	Non- influencers (n=201)
Openness to influence	Open to influence	55%	52%
	Not open to influence	45%	48%

Essentially, the telecommunications market can be divided into four roughly equal groups:

1. Influencers who are open to influence (others come to them for advice on which products to buy and they plan on speaking to others when deciding on which brand of handset to buy)
2. Influencers who are **not** open to influence (others come to them for advice on which products to buy and they **don't** plan on speaking to others when deciding on which brand of handset to buy)
3. Non-influencers who are open to influence (others **don't** usually come to them for advice on which products to buy and they plan on speaking to others when deciding on which brand of handset to buy)
4. Non-influencers who are **not** open to influence (others **don't** usually come to them for advice on which products to buy and they **don't** plan on speaking to others when deciding on which brand of handset to buy)

This has some noteworthy ramifications for the practice of influencer marketing.

The flow of influence through markets via word-of-mouth communication

Firstly, there does not seem to be as sharp a distinction between influencers and those seeking advice from others on what to buy as the subtitle of Keller and Berry's book would have us believe. In other words, the notion that influencers are telling the rest of us what to buy is extremely misleading. This is because when it comes to looking at who is "open to influence", things become a lot murkier. In this market, half of the *influencers* are "open to influence" while the other half are not. Some people, it would seem, just want to talk to others about the products and services they are thinking of buying, and some just don't.

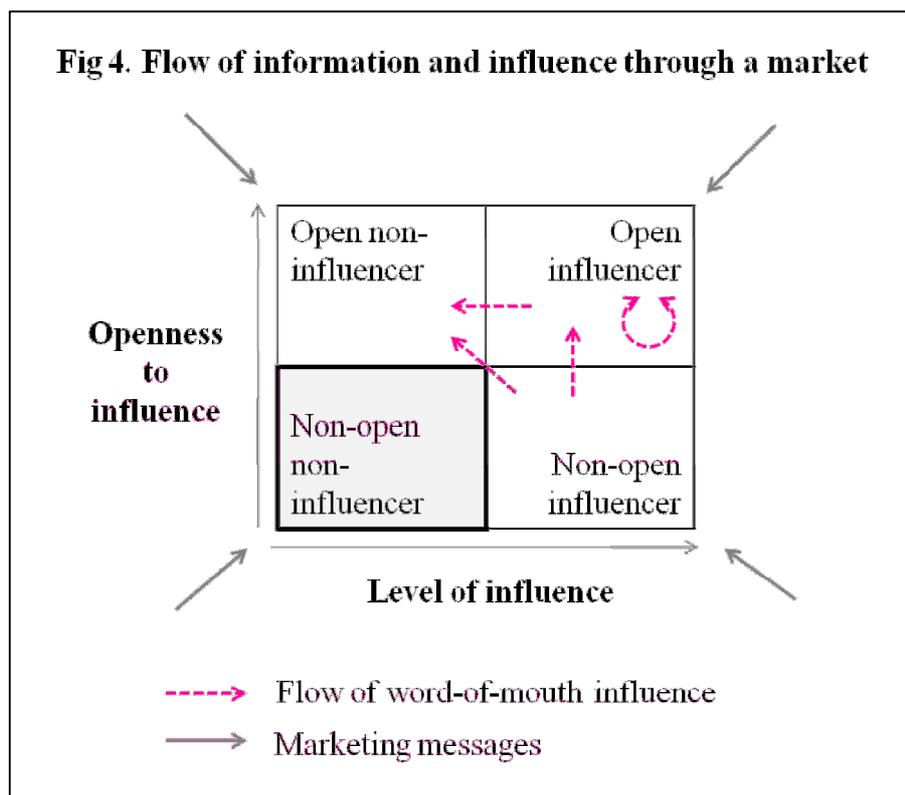
Because some influencers are open to influence and others are not, it seems likely that some of the time at least, influencers are just sharing product information and advice with other open influencers. So if you're a marketer who is considering targeting influencers, particularly if you're recruiting them using a snowballing approach, beware. You may just be encouraging them to talk to *each other* about your brand. In fact, the WOMMA Influencer Handbook (2008) states that "influencers generally love to connect to one another" and endorses providing opportunities for them to interact exclusively with each other. That's fine if you want to reinforce devotion to your brand among influencers, but may be less effective in spreading the word to others.

However, influencers may still be disproportionately important than others in spreading information about products and brands through a market because it's likely that at least some of them are giving advice to people who aren't influencing them in return – specifically the open non-influencers. Whether or not these people act on this advice when it comes to their actual purchase behaviour is very difficult to ascertain. Incidentally, it may be worth asking yourself if you always act on the recommendations of others, even when you've asked them for their advice. Furthermore, word of mouth is not the only source of communication that consumers consult when making a purchase decision, even if it does weigh in more heavily than other sources in terms of trustworthiness and authenticity (Razorfish, 2009).

Now that we've considered those who are 'open to influence', let's consider those who are not. Those whom others turn to for advice on which products to buy, but who don't plan to speak to others before making a purchase decision, are clearly getting their information from somewhere, even if it's not through word-of-mouth communication. These non-open influencers are *already* being reached by marketing messages and so marketers may get some return by investing in them, but only if they're impacting the purchase decisions of open influencers and open non-influencers.

This leaves one group outstanding: non-influencers who are not open to being influenced. Where do they fit in terms of the influentials hypothesis? They're not a source of advice or information and they don't plan on speaking to others prior to making a purchase decision. One thing is for certain – they seem the least likely to start a trend. Yet according to this data, they account for about a quarter of the market. As with the non-open influencers, they must be getting their product information from somewhere and if it's not via word of mouth, then it's likely that they're getting it from... marketing messages.

From the above discussion, the flow of information and possible influence through the market can be illustrated as follows:



The case for tailored communication

More than anything, these findings highlight that different consumers like to communicate about products and brands in different ways. In the telecommunications market, all four of the above groups are equally likely to look at in-store displays ($\pm 65\%$), look for information in newspapers and magazines ($\pm 36\%$) and look for information on TV ($\pm 34\%$) to help them decide on which brand of cellphone to buy next. Open influencers prefer speaking to both friends and colleagues *and* in-

store sales people, while non-open influencers are more likely to look for information online rather than speak to friends and colleagues. Open non-influencers are more likely to speak to just their friends and colleagues, while non-open non-influencers are most likely to decide based on prior product experience without talking to anybody at all.

Consumers clearly don't just rely on information from only one source, and with the growth of online and digital, this is not likely to change. Rather than investing heavily in building long-term relationships with key influencers, marketers should use their resources to provide the best quality information at all key contact points and tailor marketing messages to suit both the method of delivery as well as the type of consumer who is most likely to access it. In an established market like telecommunications, a well-executed mass marketing campaign is a better bet.

The debate rages on...

The first proposition of the influentials hypothesis, that some people are more influential than others, is not only intuitive, but also appears to be quantifiably true. Insofar as influential individuals *recognise themselves to be a source of information or advice to others* in a particular market, they are fundamentally different from non-influencers on a number of key measures. This supports the view that influencers can be identified using a set of pre-specified measures and lends credence to the development of an influencer index.

By providing word-of-mouth information to those who are open to receiving it, influential individuals may well be disproportionately important than others in starting trends. However, this is certainly not to the extent that proponents of the influentials hypothesis claim.

The main problem with the influentials hypothesis is that it is too simplistic. It seems to assume that influence only flows in one direction – from marketers to influencers to non-influencers. In reality, human communication is far more dynamic and multi-directional than that.

It makes sense that for a trend to catch on, it must have some social value. But despite how catchy it is, a certain level of inertia in the diffusion of a trend or the uptake of a new product in any market is likely to set in. This is because the market isn't strictly divided into influencers and those who are open to being influenced, but rather a blend of the two. So no matter how enthusiastic influencers are about a particular product or brand, they're just not going to reach everyone else. However, the

more people in a market who are open to the word-of-mouth transmission of a trend, the more likely it is to spread rapidly from person to person. In other words, if the number of those who are open to talking about a product with others in a particular market increases, then in all likelihood the uptake of that particular product would also increase.

Furthermore, consumers are unlikely to rely solely on information from one source. Instead, they will probably reconcile the advice they get from others with the information they receive from other sources.

As any marketer who has ever attempted to start a trend would have realised, getting people to do what you want can be very tricky. The challenge of marketing is getting the right product, at the right price, to the right person, in the right way, at the right time, using the most suitable promotion. Those are a lot of factors to get right and as with most things in life, there is always an element of chance. While targeting influential individuals may be helpful in convincing some people to purchase a certain product or brand, this should never be at the expense of a well-planned and carefully targeted communications strategy that engages all relevant consumer groups. It would therefore be short-sighted for marketers to overinvest in influencing the influencers.

Limitations and future research

This research makes use of respondent-driven data and is therefore prone to the common biases inherent in data collection methods of this type. One of the main criticisms may be that “influencers” are self-nominated and therefore prone to overstating the amount of influence they have over others in order to be perceived in a more favourable light. However, as investigating interpersonal influence was not a main goal of the overall study, the questions from which the classifications were drawn was not a key focus area for respondents and so less likely to have informed their desire to be perceived in a certain way.

A further limitation of this research is that it investigates consumer influence in only one market: mobile telecommunications. It would be interesting to see if similar trends in interpersonal influence are present in other markets, or if they are markedly different, and possible reasons for this.

This paper deals mainly with word-of-mouth communication and how it flows through a market. A key criticism is that this might not correlate with actual consumer behaviour. As Watts suggests, interpersonal influence on actual behaviour is likely to be far more dynamic and unpredictable. One of the possible reasons for this is that much of the communication that takes place between human beings is non-verbal and is difficult to capture using verbal tools and measures. It has often been suggested that non-verbal communication is more compelling than verbal communication in getting a message across. A possible area to be explored in future research is the extent to which the ability to observe a particular (consumption) behaviour affects how quickly it spreads through a social group. In order to get a word-of-mouth message to travel quickly from person to person (as in a viral or buzz marketing campaign), it is usually recommended that the message be entertaining, informative or newsworthy. One hypothesis is that those trends which are easily *observable* to others are more likely to spread quickly through a social group than those which are not. For instance, the consumption of a new type of shoe (such as Hush Puppies) is more likely to catch on and be disseminated rapidly through a social group than a new brand of deodorant, merely by virtue of the fact that the shoes are highly visible while the usage of deodorant is not. So even those who claim that they aren't open to the influence of word of mouth may find themselves purchasing products due to the observable behaviours of others.

A further limitation of this research is that it doesn't venture into the realm of online social influence. One of the reasons for this is that, according to AMPS 2009A, currently only 23% of metropolitan South Africans have Internet access (and only 13% of the South African population as a whole) and some of those who do have very limited bandwidth. This obviously puts constraints on both the type of person online and the amount of interaction happening between individuals. Nevertheless, online models of actual social influence still represent a strong possibility for more in-depth investigation of the way influence spreads. In future, this data might also be able to provide a more observation-based measure of influence that takes into account both verbal communication and behaviour as opposed to just a reported measure of the flow of communication through a social group.

Finally, despite all the work being done to understand how individuals influence each other, the way trends actually start is still vague. Is something set to be a hot new trend *because* influencers are doing it or are they doing it because it's the next big thing? Neither Gladwell's analogy of an epidemic nor Watts' analogy of a forest fire is particularly helpful in understanding how trends start, only how they are propagated. Even if it is the case that that society becomes susceptible to a trend, the mechanism by which this occurs is a mystery yet to be solved.

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