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#collabhouse #stardust #influencer #professionalizeyourself: an exploratory study on the rise of new intermediaries in social media

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Abstract

Despite the steep growth in social media usage, the growing popularity of influencers on social networking platforms, and growing prevalence of influencers as consumer engagers, scientific research that addresses in detail the evolution of the influencer industry and its commoditization has remained lacking. Today, we are witnessing the rise of new intermediaries in the influencer industry called Collab Houses that are deeply changing the dynamics of the influencer industry. This study aims to identify if the critical marketing functions of influencers are still critical for Collab Houses and how Collab Houses are fighting the commoditization trap. Through the in-depth analysis of a case study we identify the dynamics that, with the introduction of the Collab Houses, are leading the evolution of the market and how the role of influencers is changing with these new intermediaries. Specifically, this study breaks new ground in the conceptualization and empirical understanding of the commoditization phenomenon of influencers and their professionalization.

Keywords: influencer marketing; social media; collab houses; digital marketing; commoditization; content creator

Introduction

In the first quarter of 2021, Tik Tok reached 1 billion monthly active users and Facebook almost 3 billion, the global expenditure of firms on social network advertising has grown at a compound annual growth rate (CAGR) of +32.2% from 2014 to 2017. Global revenues from social media advertising show a CAGR, from 2017 to 2020, of around 27.7% and an expected growth
of +10% from 2021 to 2025 (Statista, 2019, 2020). These figures well explain the central role of social media both in terms of user-generated content and as a virtual showcase of products and services for companies.

If it is true that companies have slowly taken advantage of the spread of internet, through social media and multi-sided platforms (Alfonso et al., 2021; Bhatti et al., 2020), other players have grasped the opportunity offered by social media: the influencers.

This happened as some social media users have ultra-developed their skills in generating content. Both from a technical perspective, by elevating the quality of the content generated, and from a creativity perspective by intercepting and creating new trends that rapidly become viral over the internet. This phenomenon has led to the rise of the influencer as a marketing tool for companies (Belanche et al., 2021; Haenlein et al., 2020; Jin et al., 2019), the so-called influencer marketing.

Scholars, since the birth of this phenomenon, have tried to address relevant issues in the domain of influencer marketing such as product endorsement and consumer engagement (Belanche et al., 2021; Kim & Kim, 2021; Tafesse & Wood, 2021) or efficacy of influencers versus celebrities (Mishra, 2015) or even influencers’ leadership and likeability (Casaló et al., 2020; De Veirman et al., 2017).

Surprisingly, relatively little strategic or academic insights exist that are specific to the influencers industry and its evolution. In fact, the steep growth in the number of influencers and the key role played in the sponsorship of products and services, has led to two main outcomes. First we are assisting to the professionalization of the influencer, who embodies three critical marketing functions: access to a potentially highly engaged audience, an established endorser persona and skills in social media management (Abidin, 2017; Campbell & Farrell, 2020; Hou, 2019). Second we are witnessing the commoditization of an industry where the value is shifting from the players who control scarce resources (the influencers and their creativity) to the players who control the demand for abundant resources (collab houses) (Barnett, 2018; Matthyssens & Vandenbempt, 2008).

This paper attempts to fill this theoretical gap by seeking to identify the role of Collab Houses in the influencer industry and, more specifically, if the critical marketing functions of influencers are still critical for Collab Houses and in which way Collab Houses are fighting the commoditization trap of the influencers industry. To do so we begin our research with a theoretical background highlighting the value of influencer marketing and the role of the influencer. Furthermore, we explore the role of the Collab Houses as new intermediaries in the social media industry. To do so we leverage a grounded theory development methodology, single case analysis (Gaya, 2016), which
well adapts to the necessity of new theory extension on the implications of the professionalization of influencers in the social media context, providing a practical investigation of the phenomenon observed (R. K. Yin, 2009, 2011).

**Theoretical background**

**Social Media Influencers: role and characteristics**

The rise of social media and the rise of born-digital generations as active consumers (Bento et al., 2018; Childers et al., 2019) has disrupted the way companies and advertisers reach their audiences. If, back in 2010 when Instagram was first launched on the market, everyone could potentially become a content creator, no matter the quality and the content of the posts, today this content is becoming increasingly professionalized (Abidin, 2017; Hou, 2019; Van Dijck, 2009). Social media influencers are prominent social media users who accumulated a dedicated following by crafting an authentic online persona (Tafesse & Wood, 2021).

Academic literature has proposed a categorization of the influencers dividing them in five macro-categories: nano-influencers (0-10K followers); micro-influencers (10-100K followers); macro-influencers (100K-1m followers); mega-influencers (1m+ followers) and celebrity influencer (1m+ followers and celebrity status) (Campbell & Farrell, 2020). Furthermore, as stated by Campbell and Farrell (2020) all influencers embody three critical marketing functions: (1) access to a potentially highly engaged audience, (2) an established endorser persona, and (3) skills in social media management. First, influencers are aggregators of social media users with common interests (e.g. lifestyle, sport, wellness, etc.) which provide to the influencer organic reach (i.e. engagement over posts), targeting, as most influencers specialize in niche or lifestyle attitudes, and attention as influencers posts are likely to garner more consumer attention than ads from a brand itself (Pereira et al., 2014). Second, they play the role of the endorsers which is enforced by their celebrity status that derives from the aspirational *motus* of their followers or the willingness to emulate them. Influencers are also perceived experts in their own fields as consumers often seek expertise (Mudambi & Schuff, 2010) from fellow consumers, making them more persuasive due to the importance of word-of-mouth in product reviews and consumer behavior (Verma & Yadav, 2021). Third, influencers are social media managers acting on behalf of their advertisers in creating or editing content for social media, they are strategists as they develop compelling content for their brand clients and their audience (Belanche et al., 2021) and finally, they act as community managers engaging with their followers and keeping track of the metrics to measure advertising success (Kim & Kim, 2021).
However, from the company perspective, the influencer, in order to be credible to its audience, must embrace the image and the values conveyed by the product or the company (Belanche et al., 2021). The lack of authenticity might not only affect the influencer but also the company resulting in a waste of resources for the company and a loss of followers for the influencer. An example is the mismatch between Volvo’s toxic-free car cleaner and Chriselle Lim (1.4 million followers on Instagram). The endorsement did not ring true to her followers (Influencer Marketing Hub, 2018; Statusphere, 2019) and complained that the message was unlike the content she usually posts which seemed inconsistent with the image of a jet-setting lifestyle she depicts (Geyser, 2017).

The risk to be inconsistent and not to embrace the right values or image of the represented company led to the birth of new intermediaries in the influencer industry.

**Fighting the commoditization trap: new intermediaries in the influencer industry**

The rapid development of social media and the steep rise in the number of influencers, at disposal for companies and actively competing to find new collaborations, has accelerated the process of commoditization in this relatively new industry (Guiltinan & Gundlach, 1996). In fact, the rise of social media has forced companies to seek for new forms of advertising, becoming more informed and building skills in the influencer marketing domain which, from a strategic perspective, has allowed them to look for substitutes from traditional marketing channels (Day & Wensley, 1983; Matthyssens & Vandenbempt, 2008; Shapiro, 2002).

If social media platforms are zero-priced content distributors it might be intuitive to suppose that there are lower entry barriers in the market which relieve concentration by eliminating input costs for intermediate users (Barnett, 2018). However, as theorized by Barnett (2018), the analysis of technology markets shows that the opposite outcome may happen. In fact, scholars have pinpointed that those markets tend to follow a three-step sequence in which (1) legal and technological exclusivity falters in the content market (2) firms adopt bundled structures in which zero-priced content is deployed to drive sales in a complementary goods market, and (3) a single firm, or a handful of firms, secure unusually high shares in the complementary goods market (Barnett, 2010, 2014, 2018; Narver & Slater, 1990; Pessach, 2012).

From a consumer perspective, in commoditized digital industries consumption costs are near to zero but, instead, consumers incur in significant search and evaluation costs that are given by the abundance of content that
results from weak copying, display and storage constraints. These burden of users’ search-cost invites entry by intermediaries that specialize in supplying aggregation services that reduce those costs (Burnham et al., 2003; Barnett, 2018; Pelham, 1997). In this contest, the new intermediaries are represented by the so called Collab Houses.

Collab, as the word itself recalls, stand for collaboration and house is the physical place were these influencers live and generate their content. The first Collab House dates back to 2014 when a group of Youtubers, called Our Second Life, decided to move together in a mansion, the 02L Mansion, in California. Soon after, new mansions were inhabited by tiktokers, youtubers, viners or instagrammers, such as Vlog Squad, Clout House, and Team 10 (Lorenz, 2020).

However, in 2019 a new mansion was revealed to the general public, becoming the most famous Collab House since the birth of the phenomenon: the Hype House. Situated in Los Angeles, this Spanish style mansion, houses 19 influencers with four of the group’s members living on location full-time. What is so special about the Hype House is the cumulated number of followers of their residents, a total of around 126 million followers. In Europe, the phenomenon did not wait much before debarking (Forbes, 2021).

Essential to Collab Houses, whether they are located in Europe or in the United States, is the set-up of the house. Structured and decorated more as a film studio than as a proper house, the purpose of these mansions is to foster creativity, hence making videos, vines, photos and stimulate the collaboration between influencers. The necessity to group these young influencers derives from the need to fuel the homepage of social media users with constantly new content, possibly original, and to create trends in order to generate hype and engagement (Lorenz, 2020).

Method

A number of studies have been conducted on the role of social media and influencers in modern marketing. However, the influencer industry and its evolution still remains an under investigated topic in the academic world. Thus, the objective of the paper is to identify the role of Collab Houses in the influencer industry as intermediaries fighting the commoditization trap of the industry (Barnett, 2018) and as providers of the critical marketing functions for influencers (Campbell & Farrell, 2020).

We adopted the single case study method to gather information on the relevant topics and clarify how this new phenomenon is changing the influencer industry and the relationship between companies and influencers (Eisenhardt, 1989). As Eisenhardt wrote (1989), the case study method is particularly useful
to new research areas and helps in identifying new insights that cannot be found through surveys (Chetty, 1996).

Our study relies on and benefits from the interview held with two of the five founders of Stardust House – Simone Giacomini and Antonino Maira – and we had access to data and insights that we collected to evaluate the impact that Stardust House had within the market and on the influencers themselves (e.g. number of followers, cross-fertilization of contents, etc.). Stardust is an Italian Collab House founded in the first half of 2020 whose growth reached 4.6 million€ in revenues in one year and a half. Stardust reinforced its business model closing agreements with major music labels, brands and by adopting a new business model in the sector: founding the Stardust Academy.

For the newness of the topic and the presence of few players in the market, Stardust House can be considered a representative case for the phenomenon investigated (Patton, 1990; Stake, 1995; R. K. Yin, 2003).

Before conducting the interviews we collected data and information on the web from public sources to identify the most important points and key elements to test during the interviews (Eisenhardt, 1989). The interviews were realized at the beginning of August 2021 and lasted two hours each; due to the impossibility to reach physically the location of the Collab House for social reasons (Covid-19) they were organized via conference call. Finally, Stardust made available important data and insights to the researchers on the evolution of their projects and key performance indicators.

The interviews with the two founders of Stardust House helped us to understand all the complex dynamics and the issues that characterized this new way to interpret the market of influencers (R. Yin, 1984). To avoid the subjectivity of the interpretation of both data and information gathered, authors autonomously analyzed the material and, only in a second phase, the main points were commonly discussed.

Findings

Through the analysis of the information collected we gave an answer to our two research questions about the role of the critical marketing functions of influencers (Campbell and Farrell, 2020) and we identified the actions through which the Collab Houses fight the commoditization trap of this industry (Barnett, 2018).

Are the three critical marketing functions of influencers still critical for Collab Houses?
First of all, it is necessary to shortly explain how Stardust manages the Collab House, the influencers and the projects. Stardust identifies, along with brands/companies, some objectives to be reached and constantly monitors data coming from different social media platforms (i.e. Tik Tok, Instagram, etc). Stardust decides the number of influencers to be involved in each campaign, the social media on which to launch the campaign and the number of activities that are necessary to reach the expected results (e.g. vines, contests, etc.). Then, the process is implemented in a professional way, sketches or contests are studied, rehearsed and filmed and the campaign is monitored through defined KPIs. This is important to contextualize the following evidence.

From our analysis, two functions of Campbell and Farrell - (1) access to a potentially highly engaged audience and (3) skills in social media management - are directly managed by the Collab House while the remaining function - (2) established endorser persona - seems partially managed by the Collab House and partially cross-fertilized by the group of influencers.

The two critical characteristics managed by the Collab House are audience engagement and skills in social media. The audience is highly engaged due to the activities identified to achieve the objectives planned with the brands/companies. “We can reach such results because we act on multiple social platforms with multiple initiatives and a unique roster of influencers, controlling both the content and the quality of the work realized”. The role of the Collab House is to professionalize influencers, giving them tools and skills to make a high quality work. “Through the Academy we are able to transfer skills to influencers such as editing, acting, brand and social communication”. The Collab House knows how followers react to their influencers’ posts and videos. In table 1 it is shown a sample of the key performance indicators monitored, necessary to gather enough insights and data to identify the best initiatives to implement to engage people and reach the objectives.

Table 1. Influencers key performance indicators on an initiative on TikTok.
Usually influencers use the smartphone to record a video, they do not have the right instruments to make a professional work at home. We give them everything and we help them to learn how to become professional influencers": brands/companies are looking for high quality contents able to represent their reality and the Collab House is responsible of what is recorded and uploaded online.

The point that is partially depending on the Collab House and the roster of influencers is the one about being established personas. From the interview it emerged that not all the chosen influencers had a social media profile. “We began to identify profiles of quite established influencers but then we introduced in our house also people who were not present on social media”: Stardust management shows, through data, that people (not yet influencers) with no online social media profiles can reach a great number of followers in a few months thanks to the strength of the group and the cross-fertilization of their fan base. This is the first evidence that underlines the important role of the Collab House in creating a shared online environment among influencers, where the influence themselves are enablers for other social media users to become influencers through cross-fertilization of the accounts.

Table 2. Growth in number of followers, engagement rate and advertisement campaigns

<table>
<thead>
<tr>
<th>Influencer</th>
<th>Views</th>
<th>Likes</th>
<th>Comments</th>
<th>Shares</th>
<th>ER%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influencer 1</td>
<td>919.100</td>
<td>149.700</td>
<td>295</td>
<td>129</td>
<td>16.33%</td>
</tr>
<tr>
<td>Influencer 2</td>
<td>548.900</td>
<td>95.000</td>
<td>253</td>
<td>129</td>
<td>17.38%</td>
</tr>
<tr>
<td>Influencer 3</td>
<td>401.300</td>
<td>82.000</td>
<td>100</td>
<td>47</td>
<td>20.47%</td>
</tr>
<tr>
<td>Influencer 4</td>
<td>333.000</td>
<td>72.600</td>
<td>266</td>
<td>38</td>
<td>21.89%</td>
</tr>
<tr>
<td>Influencer 5</td>
<td>280.900</td>
<td>55.500</td>
<td>162</td>
<td>43</td>
<td>19.83%</td>
</tr>
<tr>
<td>Influencer 6</td>
<td>261.200</td>
<td>50.300</td>
<td>113</td>
<td>31</td>
<td>19.31%</td>
</tr>
<tr>
<td>Influencer 7</td>
<td>252.500</td>
<td>44.300</td>
<td>371</td>
<td>26</td>
<td>17.70%</td>
</tr>
<tr>
<td>Influencer 8</td>
<td>230.600</td>
<td>55.600</td>
<td>75</td>
<td>27</td>
<td>24.16%</td>
</tr>
<tr>
<td>Influencer 9</td>
<td>199.500</td>
<td>31.500</td>
<td>100</td>
<td>13</td>
<td>15.85%</td>
</tr>
<tr>
<td>Influencer 10</td>
<td>197.100</td>
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<td>82</td>
<td>27</td>
<td>25.17%</td>
</tr>
<tr>
<td>Influencer 11</td>
<td>183.000</td>
<td>35.700</td>
<td>86</td>
<td>18</td>
<td>19.57%</td>
</tr>
<tr>
<td>Influencer 12</td>
<td>134.300</td>
<td>17.800</td>
<td>56</td>
<td>15</td>
<td>13.31%</td>
</tr>
<tr>
<td>Influencer 13</td>
<td>0</td>
<td>166.300</td>
<td>380</td>
<td>145</td>
<td>-</td>
</tr>
<tr>
<td>Influencer 14</td>
<td>125.300</td>
<td>24.100</td>
<td>39</td>
<td>8</td>
<td>19.27%</td>
</tr>
<tr>
<td>Influencer 15</td>
<td>115.200</td>
<td>23.900</td>
<td>3.263</td>
<td>10</td>
<td>23.59%</td>
</tr>
<tr>
<td>Influencer 16</td>
<td>113.400</td>
<td>32.600</td>
<td>82</td>
<td>25</td>
<td>28.84%</td>
</tr>
<tr>
<td>Influencer 17</td>
<td>88.000</td>
<td>15.100</td>
<td>34</td>
<td>7</td>
<td>17.21%</td>
</tr>
<tr>
<td>Influencer 18</td>
<td>401.200</td>
<td>65.900</td>
<td>140</td>
<td>37</td>
<td>16.47%</td>
</tr>
<tr>
<td>Influencer 19</td>
<td>64.300</td>
<td>14.800</td>
<td>44</td>
<td>9</td>
<td>23.10%</td>
</tr>
<tr>
<td>Influencer 20</td>
<td>618.700</td>
<td>102.900</td>
<td>388</td>
<td>210</td>
<td>16.73%</td>
</tr>
</tbody>
</table>

Aggregated results

<table>
<thead>
<tr>
<th>Views</th>
<th>Likes</th>
<th>Comments</th>
<th>Shares</th>
<th>ER%</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.467.500</td>
<td>1.185.100</td>
<td>6.329</td>
<td>994</td>
<td>21.81%</td>
</tr>
</tbody>
</table>

Source: authors’ elaboration on Stardust House data
Influencers to realize sponsorships and brand activations, increasing S

The number of influencers on the market has been increasing steeply since the rise of social media but not all of them are able, or are suitable, to reach the objectives identified by brands/companies. It might appear intuitive to suppose that the increase in resources (i.e. the influencers) lowers entry barriers and relieves market concentration. However, there are three main reasons why this is not happening.

First, as Stardust well represents, Collab Houses raise technological barriers to the entry of the market. This happens because they act as guarantor of professional quality content to the client companies while adopting a bundled strategy in which the aggregator offers zero-priced content aggregation services (i.e. the content published by influencers on social media) coupled with positively priced advertising services (i.e. the access to the roster of influencers and the advertising campaigns). Collab House makes the single influencer unable to compete with such a business model: “companies run the risk to choose the wrong influencer or, worse, an unprepared one and risk not to achieve the objectives they want to reach. Most of the times, with the traditional direct influencer-company approach they are not able to control the content, the quality of the messages or the opinions/lifestyle conveyed by the influencer also after the advertising campaign”. The Academy created by Stardust aims to fill this gap while educating influencers to realize sponsorships and brand communication projects. This means that, from an evolutionary perspective, the companies that derive their revenue from the stand-alone delivery of content
(i.e. stand-alone influencers) will perish while intermediaries that adopt a bundled strategy will thrive.

Second, our findings suggest that Stardust, acting as a market leader, reflects the network effects which arise when advertisers value most highly the service provider that is most popular with users (or with certain types of users) and, assuming budget constraints, are disinclined to advertise (or to advertise to the same extent) on other platforms that lack a comparable user base (Evans, 2008). In fact, as shown in Table 2, Stardust’s influencers have an aggregated follower base of around 23 million social media users on Tik Tok and around 5 million followers on Instagram. These numbers well represent the incomparable outreach of these influencers in this industry.

Third, commoditization of the influencer industry does not totally eliminate rents; rather, it transfers rent-seeking opportunities from upstream content producers (i.e. the influencer) to downstream intermediaries that aggregate content within a difficult-to-replicate package of complementary goods and services. In fact, our findings highlight how Stardust captures returns on knowledge assets (i.e. the performance of their roster of influencers, data-collection services, etc.). Companies will then minimize search costs by accessing content through one aggregator (i.e. the Collab House), rather than navigating multiple channels (i.e. the single influencers) with exclusive content.

Discussion and conclusion

In the influencer industry the demand for social media campaigns appears to be growing since the birth of social media and the rise of influencer marketing, strengthened by the increase in social media advertising spending of customers, the companies.

We find that Stardust, can act as an aggregator of influencers, while positioning in between the direct nexus that ties suppliers (i.e. influencers) and customers (i.e. companies) creating value through the selling of integrated offerings. This means that prior literature which suggested that electronic markets, lowering the cost of market transactions, would have eliminated the traditional roles for intermediaries, thus leading to disintermediation (Bailey & Bakos, 1997) is proven to not be correct in this context.

Figure 1. Framework – Fighting the commoditization
Instead, in digital markets such as social media, where the direct interaction between the seller of the content, the influencer, and the buyer of the service, the company, suggested a perfect division of value creation and value extraction, new intermediaries are taking advantage of this phenomenon. Furthermore, the value creation that derives from selling the bundle of influencers as a whole has greater returns than the value creation that might derive from the sum of its parts, i.e. the single influencer selling by himself his creative content to companies (Figure 1). The same applies for influencers, hence the value proposition of Stardust is that the value creation of selling the content by itself is lower than part of value received from the selling of the content of the roster of creators in the House. Furthermore, even if it is true that there are differences among influencers in terms of skills, engagement approaches, and power sources (Campbell & Farrell, 2020), and these resources are not inimitable and can be rapidly learned by other players (Barnett, 2018), the economic power of intermediaries (i.e. Collab Houses) resides also in the scale economies as they incur in substantial fixed cost to assemble the infrastructure required to locate, create and deliver content (i.e. the house itself) but a low variable cost for each additional content asset, user, and advertiser (Haucap & Stühmeier, 2016)

In conclusion, our empirical analysis shows that as markets become more commoditized, new intermediaries leverage operational excellence and product leadership by aggregating the abundant resources and selling the aggregated resources at a premium price. Furthermore, as markets mature, total market spending on marketing and promotions typically increases. Stardust, gaining higher customer knowledge, which is helpful to acquaint themselves
with the customer preferences, hence the necessities of the companies, has timely intercepted this evolution of the industry resulting in a steep growth in sales.

**Implications and future researches**

This study expands on extant literature over social media influencer by exploring the birth of intermediaries in a once dyadic industry where content creators and brands were in direct contact. We introduce critical marketing characteristics as context of analysis of the role of the influencers while examining the ongoing issue of industry commoditization. Our findings, from a theoretical perspective reinforce the confutation of prior theories that suggested that electronic markets would have eliminated the traditional roles for intermediaries and contribute to the theoretical explanation of the evolution of this industry which, unlike any others, evolves at a blistering pace. From a managerial perspective, our findings aim to contribute to all those actors involved in this industry by providing a comprehensive framework of the evolution of the industry which shall help mangers in taking decisions while knowing how the industry will evolve and how to create value for all the actors involved.

Future research should take into consideration the modularity of the offering of Collab Houses and how these intermediaries could leverage their positioning to develop secondary markets or, even to create new markets. In addition, future research could focus on the deepening of the needs that the audience, social media users, have and how the shifts in social media content consumption could affect the ability of intermediaries to adapt. Future studies shall also deepen the role of multi-sided platforms and their algorithm who, in conclusion, is the real invisible hand of the market that decides what is shown, what will be shown and to who.

**Bibliography**


