

The Development and Challenges of Multi-Channel Network in China's Influencer Marketing Industry

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Abstract

Influencer marketing is a rapidly growing industry in China, where multi-channel network (MCN) enterprises play a vital role in managing and monetizing influencers. This paper explores the development and challenges of MCN enterprises in China's influencer marketing industry, using a qualitative research approach (focus group discussions) based on interviews with Chinese influencers, employees of MCNs, and employees of video platforms. The paper finds that MCNs in China face various challenges, such as fierce competition, low-quality content, and ethical dilemmas. However, the paper also acknowledges that MCNs provide some technical and human resources support for influencers' content creation and facilitate better matching between advertisers and content creators. At last, this paper suggests that MCNs need to adopt more innovative and sustainable practices to cope with the changing market and social demands. Moreover, to better manage the influencer marketing industry in China, a more comprehensive regulatory system needs to be established, which requires not only the guarantee of the rights of the public authorities but also the self-monitoring of the user community.

Keywords: Influencer, Social Media, China's Influencer Marketing, Multi-Channel Network

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Introduction

In recent years, with the development of social media and the popularization of portable multimedia devices, people's daily life has changed dramatically, and correspondingly, traditional mass media has gradually withdrawn from people's field of vision and replaced by user content sharing and AI algorithms based on the formation of commercial advertising model.

Take the world-famous video-sharing platform YouTube as an example, since it was acquired by Google more than ten years ago, its mode of operation has also undergone great changes, the early operation concept of YouTube relied on the rapid development of the global Internet, to achieve the content sharing and information exchange between users around the world, but with the evolution of the Internet business model and more and more capital joining the traditional Internet advertising model has been unable to meet the market demand, both advertisers and Internet users, are seeking a more effective business model. However, with the evolution of the Internet business model and the entry of more and more capital, the traditional Internet advertising model has been unable to meet the needs of the market, and both advertisers and Internet users, are seeking a more effective business model.

Research has shown that with the evolution of the Internet business model and the influx of capital, there is a need for a more effective business model in the advertising industry to meet the needs of both advertisers and Internet users¹. One study examined the case of BuzzFeed as a platform for the public good, highlighting the importance of data-driven business model innovation in journalism². Another study explored the development of business models for Internet portals and investigated different revenue streams. These research findings suggest the importance of adopting innovative business models to adapt to the changing market demands and provide more effective solutions in the digital advertising industry. In summary, the research highlights the need for innovative business models in the advertising industry, as traditional models may no longer be able to meet market demands.

As YouTube has become a mainstream media from a non-mainstream media, its commercialization model has also pointed out a direction for the whole Internet industry. In YouTube, behind every operation of the user, there is a complete set of business operation systems. Users open the site, click on the video they want to watch, and then finally to the user to share their comments on this simple process, behind the dozens of data analytics companies, advertising agencies, and marketing companies participate in it, which unintentionally also produces a huge economic value.

Although research in recent years has focused on understanding the operating logic of the influencer economy and the behavior of internet consumers. For example, one study examined the impact of internet celebrities' characteristics on consumers' impulsive buying behavior in the big data economy. The study used a multiple linear regression model to empirically test the relationship. Another study explored how Internet marketing can contribute to the competitiveness of modern companies in the digitalized economy. These studies highlight the importance of understanding the influencer economy and utilizing

¹ Santos, M., F., D., L., Zhou, R. (2018) Data-Driven Business Model Innovation in Journalism: A Case Study of BuzzFeed as a Platform of Public Good

² Ortelbach, B. (2021) The Development of Business Models for Internet Portals: An Explorative Investigation of Revenue Streams

internet marketing strategies to thrive in the digital era.^{3,4} There is a lack of research on another aspect of influencer marketing, namely the analysis of influencer marketing from the perspective of industry structure, business organization development, and media norms.

What is MCN?

A significant but understudied aspect of this story is the emergence of multichannel networks, otherwise known as MCNs, or more colloquially, YouTube networks. MCNs are intermediary firms that operate in and around YouTube's advertising infrastructure (Ramon,2016). Simply put, MCNs (known as multichannel networks, which for the sake of simplicity will be shortened to MCNs in this paper) are third-party organizations that manage influencers and provide them with help and advice on their professional activities. From the history of the development of MCNs, its predecessor was in 2007 YouTube put forward the YouTube partner program, in this program, YouTube will be from the video broadcast advertising revenue of 65% to the video creators, to encourage them to actively create more videos to expand the amount of content on the site. As the number of video creators continued to grow, several famous video creators at the time began to establish the original MCN organizations, such as maker studios, an MCN organization co-founded in 2010 with famous YouTuber PewDiePie and others (which was acquired by Disney in 2014 to form Disney Digital Network, to be disbanded and reorganized in 2019). In 2014, YouTube formalized the concept of MCNs:

Multi-Channel Networks ('MCNs' or 'networks') are third-party service providers that affiliate with multiple YouTube channels to offer services that may include audience development, content programming, creator collaborations, digital rights management, monetization, and/or sales. (Google,2023)

Meanwhile, MCN as a business model of YouTube platform, was introduced to China in 2014 and has been rapidly developed. In 2016, the term MCN rapidly gained popularity, and YouTube's MCN model was rapidly replicated in the Chinese market. Short video MCN is to unite several vertical fields and influential professional content producers on the Internet, and it is an organization that uses its resources to provide professional services and management, such as content production management, content operation, fan management, and commercial cash.⁵

According to research data from research firm iimedia Research, the number of MCN institutions is expected to exceed 40,000 in 2022 and 60,000 in 2025. in 2022, shopping is the main type of payment for Short video/live broadcast users in China, accounting for 84.1%, 49.8% of users spend 5%-10% of their disposable income on the platform each month, up from 2021. With the increasingly fierce competition in the MCN industry, MCN institutions

³ La, X., W., Gao, Y., Zhao, H., Li, Y. (2021) The influence of the characteristics of Internet celebrities on consumers' impulsive buying behavior in the big data economy: Empirical test based on multiple linear regression model *2021 2nd International Conference on Big Data Economy and Information Management (BDEIM)*, 14-19

⁴ Semenova, E., Tokmakova, E., Dorofeev, O., Trubin, A., E., Zakharov, A., V. (2023) Internet Marketing as a Technology for Achieving the Competitiveness of a Modern Company in the Conditions of Digitalization of the Economy *Journal of Modern Competition*

⁵ Analysys. cn. (2017) *China Short Video MCN Industry Development White Paper 2017*
<https://www.analysys.cn/article/detail/1001185>

need to improve the talent training mechanism to promote the sustainable development of enterprises.⁶

There is no doubt that MCN as a new business model, has not only achieved success in Europe and the United States but also gained rapid development in China, where the media environment is completely different. MCN as one of the important concepts influencing marketing, should not be limited to the YouTube platform but should be studied in a broader scope. According to the research data on China's MCN business model, the study of China's MCN business model should be centered on the following issues: As a new business model, how has MCN achieved results in China and what advantages has it brought to Chinese influencers? What are the challenges MCNs face in China's new media environment, and how can we prevent and control the problems that MCNs bring? This paper analyzes MCN as a new and evolving business model in China and assesses its impact on Chinese influencers and managers, as well as the challenges it poses to social institutions.

Literature Review

For the search for correlative literature, the literature was searched separately by language of description in the Chinese literature database: CNKI, Japanese literature database: CINII, J-STAGE, and English literature database: SCI (Science Citation Index).

As a result of organizing the extracted literature, several research directions have been found about influencer marketing and word-of-mouth marketing, depending on the respective research perspectives and research methods. It was also found that the English-language literature and the Japanese and Chinese-language literature have their characteristics and research tendencies.

Therefore, to systematically organize the literature discussed up to now, this paper presents the following seven main research directions (**Table 1**):

⁶ IiMedia. (2022.7) *China MCN Industry Development Research Report 2022-2023*
<https://www.iimedia.cn/c400/87027.html>

Table 1. *Direction about literature review*

Main research direction	clarification
1, Consumer behavior	The way in which consumers choose how to use their incomes ⁷ .
2, Social media influencers' characteristics/behavior	Individual characteristics that influencers (key opinion leaders) have and characteristics of the information they shared
3, User generated content (word of mouth)	Media content that is produced by users of that medium rather than by media professionals ⁸ .
4, Sponsorship activity	An arrangement whereby all or part of the funding of a media product or production is provided by a commercial company as a form of advertising ⁹ .
5, Advertising effectiveness	Whether, and to what extent, advertisements or advertising campaigns achieve their marketing goals ¹⁰ .
6, Industrial structure	Composition mechanism of correlated industries in influencer marketing. This concept is to be combined with 'industrial structure'. State-level
7, Industrial regulation	administrative ordinances, laws, and self-regulations concerning the economic structure of the whole society.

The following two research trends can be drawn from the research on consumer behavior: Content created by professional influencers is often not recognized as a form of advertising, but rather interpreted as general consumer content creation. One of the key motivations for the various actions taken by consumers to bring influencers to their attention is the 'normal' attributes of influencers. It is not that they are in the same position as the de facto average consumer, but the subjective view of the average consumer (Alice et al,2018). Moreover, in the interaction between influencers and consumers, the relationship of trust between the two becomes an important factor in influencing consumer behavior. influencers are deemed more trustworthy than celebrities, and people feel more similar to influencers and identify more with them than celebrities (Alexander et al,2019).

In terms of influencer characteristics, there is a clear difference between the content created by influencers and the evaluations published by consumers. Influencers (market mavens /when compared to non-mavens) have more followers to post more often, have fewer readable posts, use more uppercase letters, use fewer distinct words, and use hashtags more often (Paul et al,2021). Moreover, influencers are not only differentiated from ordinary

⁷ Consumer behaviour. *Oxford Reference*. Retrieved 11 Nov. 2023, from <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803095634200>

⁸ User-generated content. *Oxford Reference*. Retrieved 11 Nov. 2023, from <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803114939679>

⁹ Sponsorship. *Oxford Reference*. Retrieved 11 Nov. 2023, from <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803100524715>

¹⁰ Advertising effectiveness. *Oxford Reference*. Retrieved 11 Nov. 2023, from <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803095352962>

consumers in terms of specific creative content, but their attributes also have a great influence on the consumer decisions of ordinary consumers, which is reflected in various aspects such as trust relationships, personal charisma, and professional skills (Marijke et al,2017; Chung et al,2019; Chen et al,2021).

Turning back to the analysis of the MCN organization, we can find that Much of the controversy around MCNs stems from their structural position as middlemen, removed from the creative work of video production yet profiting from the attention and traffic generated by such videos(Lobato, R, 2016). That is, while MCN organizations rely on influencer marketing for their profits, they do not work as influencers and are a third-party industry, which makes MCNs subject to several common legal regulatory regimes. However, the problem of regulation does not only plague Europe and the United States as the birthplace of MCN but also applies to China. In Europe and the United States, organizations and platforms similar to MCN, such as eBay and Airbnb, not only rely on the state and other public authorities but also need to be a kind of regulation from the bottom to the top: the communities and user groups that they serve. It is this combination of bottom-up and top-down methods, and between state regulation, co-regulation, and self-regulation, that characterizes the situation of digital intermediaries (Lobato and Thomas, 2015: 116–138).

Therefore, this paper not only explores what role MCNs play in influencer marketing in China but also discusses what kind of regulatory system should be established regarding the development of MCNs in China. The emergence of MCNs has indeed brought great changes to the influencer marketing industry, but relatively, the chaotic state of the industry has also brought new challenges to China's influencer marketing industry. Through interviews with relevant industry practitioners and platforms, this article summarizes the special advantages and regulatory issues brought by MCNs in China's influencer marketing industry at this stage.

Methodology

This paper utilizes the research methodology of Focus Group Discussion (FGD), which is a signature qualitative research methodology. FGD is a research method developed by Robert Merton of Columbia University as a method of evaluating radio wartime morale and campaigns after World War II (Vaughn et al., 1996). In the 1950s, because of its ease and efficiency, it became widely used in the marketing and advertising industries to quickly obtain consumers' impressions and reactions to new products (Yoshimi, 2000). Since the 1980s, FGD has also been used in a wide range of academic fields, such as sociology, psychology, education, and demography, as a qualitative research method to complement quantitative research methods, and its methods have diversified by its objectives. It is also often used in applied fields such as project evaluation and analysis (Morgan, 1993).

FGD is "a discussion in which a small number of subjects from a well-defined population is brought together to have a focused discussion on a pre-selected topic of research interest." (Knodel et al., 1990), based on this definition, this study set up relevant discussion subjects around influencer marketing and MCNs in China and implemented a total of four focus group discussions through the online video conferencing software "Zoom", the details of which will be explained in the Data Collection section.

Data Collection

The focus group discussions implemented in this study were based on the template used as a basis for the survey implementation methodology for focus group discussions in the 1996 publication *Focus Group Interviews in Education and Psychology* (Vaughn et al. 1996). On this basis, this study made several adjustments to the actual implementation of the focus group interviews based on the specific nature of the respondents associated with influencer marketing and MCNs. Taking into account the occupational specificities of the influencers and their actual physical location, the visit utilized the methodology of online meeting discussions rather than real meetings. The moderator of the meeting used recording software to record the speeches and expressions of the respondents participating in the discussion, but some of the influencers refused to use the camera to participate in the discussion because of their privacy, so this survey focuses on analyzing the content of the speeches and the tone of voice of the discussants.

A pre-prepared guideline was sent to the targets the day before the focus group discussion. The guideline contained the following information: purpose of the research, targets of the research, content of the discussion, process of the discussion, and notes (**Table 2**).

Table 2. *Focus group interview study on influencer marketing Guidelines*

purpose of the research	targets of the research	content of the discussion	process of the discussion
The State of the Influencer Marketing Industry in China	Influencers (both active and former, From video platforms Bilibili and TikTok)	Personally relevant: work experience, work environment, work content, software used, organizations worked with, etc.	1. Introductions: greeting by the moderator and explanation according to the guideline(5min)
Comparison with influencer marketing in other countries			2. Warm-up: confirmation of software operation and call quality, discussant introductions(5min)
Structure of MCNs business model	Employees working at MCN	Related to MCNs: Perception of MCNs, Evaluation, Comparison of MCNs across countries, etc.	3. Confirmation of terminology: check with the discussants on the terminology to be used. (5min)
Advantages of MCNs			4. Brief discussion: discussion of some frequently asked questions(15min)
			5. Core discussion: discussion of highly specialized and complex issues(30min)
			6. Summarize: The moderator summarizes the content of the discussion and confirms it with the discussants. (10min)
Normative systems related to MCNs	Employees of video-sharing platforms (TikTok)	Relevance to industry regulation: current problems with MCNs, perception of existing regulation, opinions	7. Conclusion: clarification of issues such as the use of personal information, and thanks to the discussants. (5min)

The three focus group discussions implemented in this study were conducted in September 2022 (influencers), October 2022 (Employees of MCNs), and November 2022 (Employees of video-sharing platforms).

Results

After the completion of the three focus group discussions, the audio files, which totaled about four hours, were converted into about 30,000 words of text using a conference audio transcription tool. Taking into account the actual tone of the discussants and the atmosphere of the discussions, the content of the three focus group discussions was organized in three directions: influencer marketing, evaluation of MCNs, and industry regulation (also including MCNs). In the following section, the results will be presented by selecting valuable discussions from these three directions.

Influencer Marketing

In discussing the specific activities of influencers, one influencer felt that it was very difficult for influencers in China to carry out activities such as content creation independently and that influencers needed financial and technical support:

Personal characteristics and the capital behind them are crucial requirements for anyone who wants to work as an influencer. Without both, it is very difficult for influencers to stay active for long. I have been an influencer for two years now and most of my influencer friends who started at the same time have left the business. (game streamer)

However, another influencer gave his opinion on this issue, arguing that it was not sufficient to rely on external support for financial and technical support:

Investors are always cautious. In the influencer industry, when manufacturers, video creators, and streamers are all seen to be making money, it is fundamental that investors step into the industry for the first time. (video creator)

Another video creator said that a long-term presence on video-sharing platforms requires the creation of new content, which can only be achieved by constantly improving one's competence:

Influencers need to be able to read the operational trends of the platform, for example, in the case of Bilibili Video, which used to be developed around anime-related content, but is now incorporating a wider range of content, and influencers who can adapt and change with this can achieve better development. (video creator)

Finally, video-sharing platforms offer some very different perspectives on influencer marketing, arguing that the personal power and influence of the influencer are not a necessary element for influencer marketing today:

To reduce costs, it is often seen that manufacturers themselves create content instead of using influencers. (Employees of video-sharing platforms)

For the influencer industry today, it is more common to scout influencers who already have a certain number of followers than to cultivate influencers from scratch, because it is more efficient to monetize them. (Employee of video-sharing platforms)

Evaluation of MCNs

In the discussion of MCNs, one MCN staff member illustrated the existence of some form of partnership between MCNs and platforms:

A cooperation relationship exists between the platform and the MCNs, whereby the platform regularly and irregularly gives tasks to the MCNs, and the MCNs that complete the task receive a certain amount of resources (e.g. funds, or attention and ranking on the platform). (Employee of MCNs)

The staff of the video-sharing platform also confirmed this view:

There are no three-party agreements (contracts for third parties) between MCNs, advertisers, and platforms; a common pattern is to enter into two contracts, i.e. an advertiser signs a contract with MCNs and another with a platform at the same time. (Employee of video-sharing platforms)

As for the value and definition of MCNs, the attitudes of MCN employees and influencers are opposed:

For MCNs, the most important role is influencer recruitment (scouting), while other functions include management, PR, content stream monitoring, and management of social media accounts. (Employee of MCNs)

It is not enough to guarantee the monetization part; MCNs are mainly there to improve the creative content of creators, and the monetization part is only a small part of the role of MCNs. Originally, MCNs were supposed to be organizations that create value through influencers who belong to them, but the current MCNs are not fulfilling that role. (video creator)

This also proves that China's influencer marketing industry is facing some problems, and this problem is due to the uneven level of professionalism of MCNs, which affects the stability of the whole industry.

Industry Regulation

When it comes to influencer marketing industry norms in China, the majority of influencers are negative, and some say they are not comfortable expressing their views, perhaps due to the relatively tough media environment in China.

According to one of the influencers, the influencer industry in China is in a state of disarray, not only at work but also in the daily lives of influencers:

To be honest, the influencer industry in China is still in disarray. Due to the peculiarities of their work, streamers often find that not only their work but also their life rhythms are disrupted. (game streamer)

Another part of the MCN staff criticized the current chaos of influencer marketing in China from the perspective of the professionalism of the practitioners:

In terms of the live-streaming industry as a whole, the employee standards for influencers are extremely low, as anyone can live-stream without special skills, and there is a large difference in the qualifications and expertise of the employees in this industry. (Employee of MCNs)

When the topic came to the specifics of the disorganization of the industry, one influencer became very agitated, stating some of the things she had personally experienced:

Many influencers are deceived by MCNs. Many young people who are influencer activities are high school students, university students, and young people who have just entered the workforce. It is easy to believe what people say and those who are scouting for them are those who are getting better at using language. For example, if they say something like "we are a listed company" and everyone hears "listed company", they will believe that it is recognized by the state, so surely there will be no problem. (video creator)

In addition to the information listed above, the focus group discussion also yielded a lot of valuable information such as the actual operational structure of MCNs, the content of cooperation between platforms and MCNs, and how public authorities standardize and manage the influencer marketing industry, which due to the length of this paper, will not be listed in detail here, but rather is organized in a table (**Table 3**).

Table 3. Key findings from the Focus Group discussion

Discussion	Influencers	Employees of MCNs	Employees of platform
Cognition, evaluation of MCNs	Recognition of the existence of MCNs Partially positive evaluation	Different marketing directions exist inside MCNs	Recognize the need to work with MCNs Some of the problems with MCNs
Recognize the current state of the influencer marketing industry in China	China's influencer marketing industry has many problems Such as low professional skills of practitioners, unfair competition, etc.	Different content platforms exist with different marketing directions of MCNs	MCNs can help new content creators earn money fast However, MCNs are not a fundamental factor in determining an influencer's ability
Comparing MCNs in China and overseas	China's MCNs draw on overseas development experience	Overseas MCNs' many business models to learn	China's MCNs and overseas MCNs have completely different development directions
Reasons to join MCNs	Monetize Reduced workload	Work with other MCNs to generate more money	MCNs can manage influencers instead of themselves
Industry regulation	Need more regulation	Not only to regulate MCNs but also to regulate platforms	Government regulation is increasing

Conclusion

This study examines the current state of development and issues related to China's influencer marketing industry and MCNs through three separate focus group discussions with different audiences. By surveying Chinese influencers (game streamers, video creators), employees of MCNs, and employees of video-sharing platforms, this study analyzes how MCNs play a role in influencer marketing in China from three different perspectives.

MCNs, on the one hand, act as a training ground for the new generation of influencers, and they can create a better development environment for influencers who have just entered the professional world from both the economic and technological perspectives, as well as shorten the cycle from content creation to revenue generation. The addition of MCNs has also made China's influencer marketing industry more complex, with more and more companies and employees joining the industry, and creating more and more job opportunities.

On the other hand, the emergence of MCNs has also brought many challenges to China's influencer marketing industry. The entry of a large number of unregulated, low-ethics MCNs has deteriorated China's influencer marketing environment, which has not only jeopardized the financial interests of influencers but also, on another level, affected the physical health of Chinese influencers. While the entry of a large number of MCNs has improved the quality of

content creation by influencers, its standardization requirements have also reduced content creation activities based on individual artistic creation and life sharing to a commercialized mode of operation, losing its original and most important characteristics.

To deal with this crisis, it is particularly important to strengthen both public authorities and user groups. Because influencer marketing is a business model formed by Internet users sharing content, the top-down regulatory model often fails to produce a good inhibition of unregulated behavior in the industry, which requires a bottom-up regulatory model, that is, a self-regulatory model based on user groups to further monitor influencer marketing.

However, this study also has some limitations, MCNs as a new type of business model, and opacity has also become its most important feature, although this study used the focus group discussion method to obtain part of the internal information of MCNs, its internal capacity is not enough to fully explain the whole Chinese influencer marketing market, and it is necessary to collect data in a wider range.

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