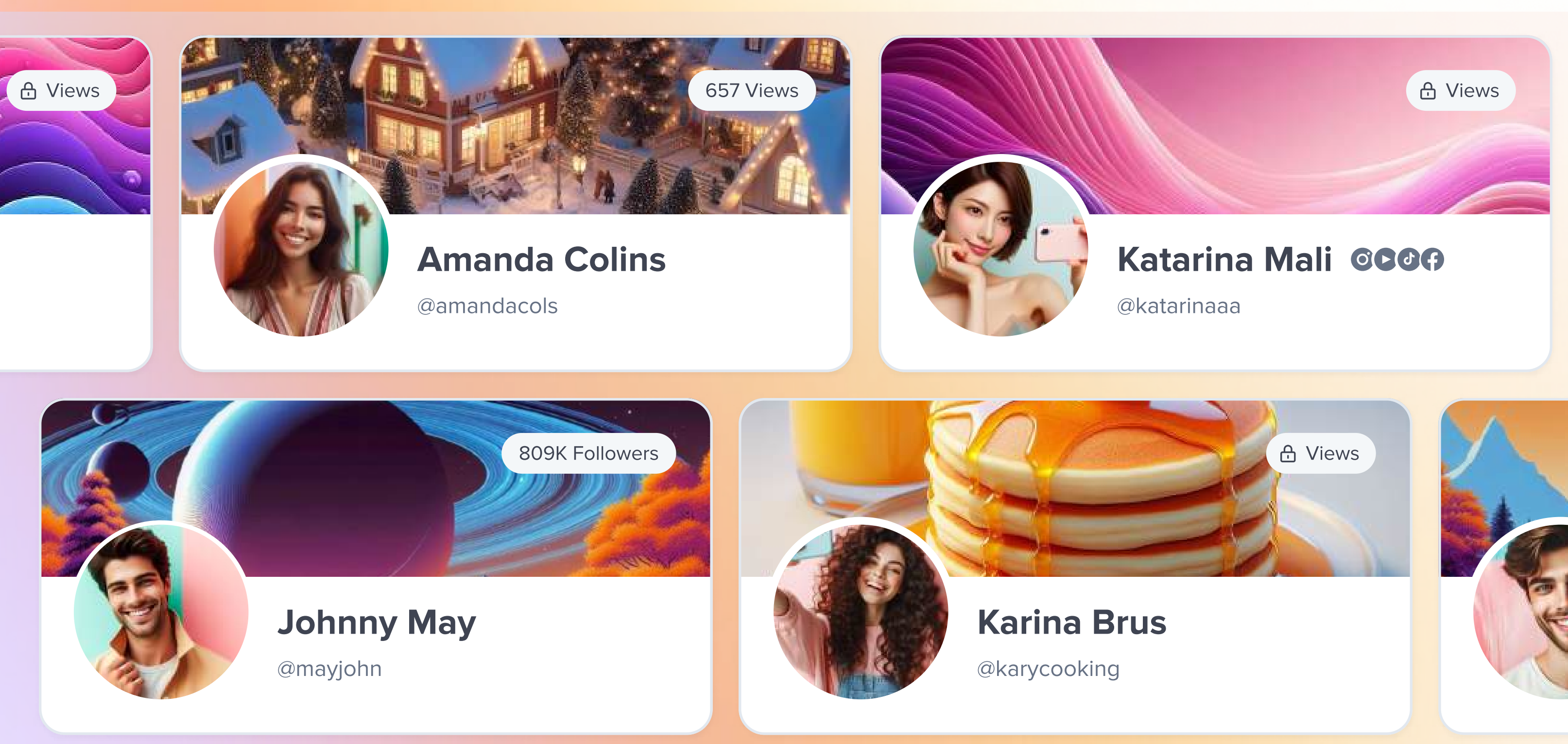
HypeAuditor

State of Influencer Marketing

2026

Trends and Performance Metrics



INFLUENCER MARKETING IN 2026: PERFORMANCE AT SCALE

By 2026, influencer marketing has moved beyond maturity into execution at scale.

The industry now focuses on efficiency, accountability, and trust, with creators fully integrated into the media mix as measurable performance channels.

Growth depends less on volume and more on **signal quality**: who influences, how impact is measured, and where value compounds over time. AI-powered analytics, creator-led commerce, and smaller, high-trust communities define this next phase of the creator economy.

This report explores how influencer marketing in 2026 works in practice.

AI has become a core infrastructure of influencer marketing. Brands use it to find creators, check audience quality, detect fraud, and forecast performance. With these tools, they can plan and scale campaigns with much more precision.

At the same time, platforms are moving beyond ad-only monetization. Subscriptions, social commerce, and creator-led revenue models give creators new ways to earn and pull influencer marketing toward more sustainable, user-centric digital economies.

2026 marks the shift from growth and experimentation to disciplined, data-driven influencer marketing built for long-term performance.

CONTENTS

TIKTOK

TikTok has become a mainstream global platform where short-form video is the default format for discovery, culture, and commerce at scale.

Its recommendation system is highly adaptive: it focuses on people's interests instead of follower counts. This lets creators and brands reach engaged audiences quickly, which makes TikTok one of the most effective channels for rapid visibility, trend adoption, and performance-focused influencer campaigns.

>1.9B
monthly active users globally

This number is continually growing

44%
of TikTok's audience is now aged 25–34

Highlighting TikTok's growing relevance for millennial audiences

88%
of TikTok influencers are nano-influencers with 1k-10k followers

They have the highest ER (11.6%) among all influencer tiers.

SHEIN SEPHORA Rare Beauty are the most talked about brands on TikTok

YOUTUBE

YouTube remains a core platform in the influencer marketing ecosystem, giving brands content that lasts and audiences who come with clear intent.

As the world's second-largest search engine, YouTube keeps influencer content discoverable long after it goes live. For brands, that means a channel that can keep pulling views, clicks, and conversions months after the campaign ends.

>2.7B

total number of monthly active users

Entertainment
Funny Videos
Gaming

account for over 39% of videos on the platform

60%

of YouTube users are between 18 and 34 years old

making it ideal for targeting this age group

However, it is still widely used by those between 35 and 44 years old (19.5%). YouTube is also more popular among a male audience in general.

56%

of marketers believe that YouTube videos are the most important content type for influencer marketing

INSTAGRAM

Instagram remains the leading platform in the global influencer marketing ecosystem.

>3B

monthly active users globally

This number is continually growing

68%

of marketing specialists consider Instagram important for their influencer marketing campaigns

76%

of Instagram influencers are nano-influencers with 1k-10k followers

They have the highest ER (1.7%) among all influencer tiers.

44.7%

of users are 25 to 34 years old

making Instagram the perfect platform to target this age group

Entertainment
Shopping & Fashion
Music

are the content topics most covered by Instagram influencers

ZARA H&M Nike are the most talked about brands on Instagram

Influencer marketing market size will reach $31 billion by 2027

Estimated influencer marketing market growth

Year	$B
2023	17.4
2024	19.8
2025	22.2
2026	26.5
2027	31.2

HypeAuditor projects the global influencer marketing market size to grow from **USD 19.8 billion** in **2023** to **USD 31.2 billion** by **2027**, fueled by accelerated adoption and technological advancements. This scenario assumes a faster-than-expected annual growth rate, with four main factors behind it:

1. **Social commerce features across platforms** like TikTok, Instagram, and YouTube make it easier for people to buy products directly from influencer content.

2. **Access to influencer tools is widening,** which brings more small and medium-sized businesses into the channel and enlarges the overall market.

3. **Technological innovations**, such as AI-powered analytics and automation, will help brands run influencer campaigns more efficiently and at lower cost, even at larger scale.

4. **Emerging markets,** particularly in regions such as Asia and Latin America, add new audiences as social media usage keeps rising.

Together, these developments position influencer marketing as one of the fastest-growing segments in digital advertising, transforming it into a core strategy for global brands.

This market size includes:

- Collaboration costs,
- UGC creation costs,
- Influencer affiliate programs,
- Influencer gifting programs,
- Agency fees,
- Technology and analytics tools,
- Social media amplification.

THE UNITED STATES LEADS GLOBAL INFLUENCER MARKETING ADOPTION

Country	Count of posts	%
United States	5,927,075	26.2
Brazil	2,856,321	12.6
India	1,329,959	5.9
United Kingdom	1,004,636	4.4
Spain	744,946	3.3
Germany	713,390	3.2
Indonesia	703,005	3.1
France	693,937	3.1
Italy	527,900	2.3
Australia	460,731	2.0

Countries by number of sponsored and likely sponsored posts made by Instagram influencers in 2025

The latest data confirms that **the United States remains the clear global leader in influencer marketing activity.** With **5.9M influencer posts**, the U.S. accounts for **26.2% of all tracked posts**, significantly outperforming every other market.

🇧🇷 **Brazil** ranks second with **12.6%**, reinforcing its position as the largest influencer market in Latin America and one of the most active globally. **India** follows with **5.9%**, reflecting continued growth in creator activity, albeit at a lower intensity compared to the U.S. and Brazil.

🇬🇧 Among European markets, the **United Kingdom (4.4%), Spain (3.3%), Germany (3.2%), France (3.1%)**, and **Italy (2.3%)** show a relatively balanced distribution, indicating steady but fragmented influencer marketing adoption across the region.

🇦🇺 Notably, **Australia (2.0%)** enters the top 10, highlighting the platform's strong presence in English-speaking, high-income markets beyond the U.S. and Europe.

The global Instagram creator economy is increasingly driven by emerging and high-population markets, while the U.S. remains a leading commercial center despite being overtaken in total creator volume.

UNITED STATES LEADS GLOBALLY BY NUMBER OF ACTIVE INSTAGRAM INFLUENCERS

Country	Number of influencers	%
United States	5,192,108	11.9
Brazil	4,477,376	10.2
India	1,892,913	4.3
Iran	1,005,129	2.3
Spain	815,656	1.9
Indonesia	676,357	1.5
Turkey	511,532	1.2
Italy	498,028	1.1
United Kingdom	417,792	1.0
Germany	388,312	0.9

Countries by number of active Instagram influencers

🇺🇸

The latest data shows that **The Unites States has the largest Instagram influencer ecosystem worldwide**, with 5.2 million influencers, accounting for **11.9% of all Instagram creators globally.**

🇧🇷 **Brazil** ranks second with **4.4 million influencers (10.2%)**, confirming its position as one of the most mature and commercially active influencer markets.

🇮🇳 **India** follows in third place, representing **4.3%** of global Instagram influencers. This highlights India's rapidly expanding creator economy, driven by population scale and increasing social media adoption.

Beyond the top three markets, influencer presence drops more sharply. **Iran (2.3%)** and **Indonezia (1.5%)** stand out as sizable emerging markets, while **Turkey (1.2%)** further reinforces the growing importance of the Middle East and broader emerging regions in the global influencer landscape.

European markets — including the **United Kingdom (1%), Italy (1.1%), Spain (1.9%),** and **Germany (0.9%)** — show a more fragmented distribution, reflecting smaller but well-established creator ecosystems across multiple countries rather than a single dominant hub.

INSTAGRAM REMAINS THE LEADING INFLUENCER MARKETING PLATFORM

Instagram continues to be the **core platform for influencer marketing globally**, combining scale, creator maturity, and consistent commercial performance.

Instagram delivers stability at scale — and remains the backbone of influencer marketing worldwide.

While other platforms excel at discovery and short-term momentum, Instagram remains the **most reliable channel for always-on and performance-driven influencer programs**, supporting campaigns across awareness, consideration, and conversion.

Its strength lies in a **mature creator ecosystem**, predictable engagement dynamics, and proven ability to drive downstream actions, making Instagram the foundation of global influencer marketing strategies.

INSTAGRAM 2026: WHAT MATTERS FOR INFLUENCER MARKETING

Views and watch time are now the primary performance metrics 1/5

Instagram has fully shifted its analytics and ranking logic toward views, watch time, and retention, especially for Reels. Follower count and likes play a secondary role in distribution.

Why it matters:

Influencer selection and campaign evaluation should prioritize view efficiency, not audience size alone.

Original content is explicitly prioritized 2/5

The algorithm increasingly favors original creator content, while aggregator and repost-based accounts are deprioritized. Smaller and emerging creators benefit most from this shift.

Why it matters:

This strengthens the value of nano- and micro-influencers and rewards authenticity over scale-driven replication.

Messaging and sharing (DMs) are core distribution channels 3/5

Instagram has confirmed that DMs are now the primary way people share content. New features (DM translations, WhatsApp stickers, social sharing signals) reinforce this behavior.

Why it matters:

Influencer impact often happens in private sharing environments, which are harder to observe but critical for influence.

Longer Reels are fully supported in discovery 4/5

Instagram expanded Reels length to up to 3 minutes and confirmed that longer videos are now eligible for recommendation in Explore and Reels.

Why it matters:

Creators and brands gain more room for storytelling, product education and narrative-led integrations. Short-form no longer means ultra-short.

AI-powered creation expands — with increased transparency 5/5

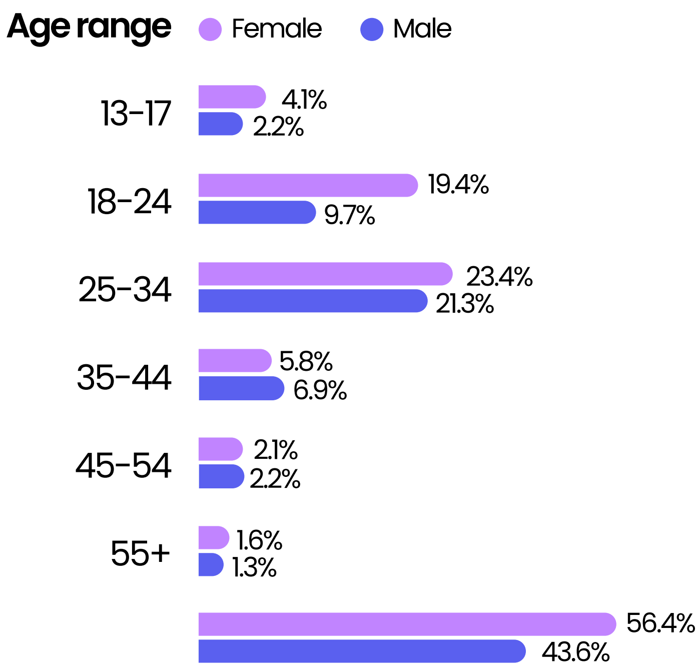
Instagram continues to roll out AI tools for content creation, while introducing AI disclosure labels in advertising, especially for paid campaigns.

Why it matters:

AI becomes a standard part of creator workflows, but trust, disclosure, and compliance grow in importance for branded content.

Being up-to-date with Instagram trends can give your influencer marketing an extra edge over the competition.

INSTAGRAM REMAINS A MILLENNIAL-LED PLATFORM, WITH NEARLY HALF OF ITS GLOBAL AUDIENCE AGED 25–34



Distribution of Instagram audience by age and gender

In influencer marketing, audience demographics remain a critical foundation for effective strategy and targeting.

The latest data confirms that Instagram continues to be strongly dominated by millennial users. The 25–34 age group alone accounts for **44.7% of the global Instagram audience,** reinforcing the platform's long-standing appeal among digitally native, purchase-active users.

Women continue to lead within this core demographic, representing **23.4% of total users**, compared to **21.3% for men**, highlighting a persistent female skew in Instagram's most commercially valuable age segment.

Overall, **84% of Instagram users are aged 34 or younger**, solidifying Instagram's position as a primary channel for brands aiming to reach younger, trend-driven audiences at scale.

KEY INSIGHT

Nearly half of Instagram's global audience falls within the 25–34 age range, confirming the platform's continued dominance among millennials and its relevance for consumer-driven influencer marketing strategies.

With HypeAuditor you can easily discover influencers with the targeted demographic data at scale.

Audience age
≥55 y.o, ≥10%

ENTERTAINMENT AND LIFESTYLE CONTENT DOMINATE INSTAGRAM INFLUENCER TOPICS

Topic	% of influencers
Entertainment	8.0
Shopping & Fashion	7.1
Music	6.8
Movies & TV Shows	6.4
Travel	5.4
Beauty	4.1
Makeup	4.0
Skincare	3.7
Dance	3.7
Personal Development	3.0

Distribution of Instagram influencers by topics

KEY INSIGHT

Instagram influencer content is increasingly shaped by entertainment and lifestyle formats, with traditional relationship-focused content giving way to culturally driven, video-native categories.

The distribution of Instagram influencer content topics highlights a clear shift toward entertainment-driven and lifestyle-oriented categories.

Entertainment now leads as the most common content focus, representing **8.0%** of influencers, reflecting the platform's increasing emphasis on engaging, algorithm-friendly formats such as short-form video, creator-led storytelling, and trend-based content.

Shopping & Fashion (7.1%) and **Music (6.8%)** follow closely, reinforcing Instagram's role at the intersection of culture, commerce, and entertainment.

Content categories tied to visual storytelling and escapism — including **Movies & TV Shows (6.4%)** and **Travel (5.4%)** — remain highly represented, aligning with audience demand for inspiration and discovery-driven content.

The presence of **Dance (3.7%)** and **Personal Development (3.0%)** further signals the diversification of influencer content toward performance-based formats and self-improvement narratives.

NICHE SPORTS AND POP CULTURE TOPICS NOW DRIVE THE HIGHEST ENGAGEMENT ON INSTAGRAM

Topic	ER (%)
Snowboarding	4.0
Comics	3.9
Hockey	3.8
Golf	3.8
Anime	3.7
Outdoor Activities	3.4
Football & Soccer	3.4
Running	3.3
Cricket	3.2
Kids Sports	3.2

Topics with highest average ER

KEY INSIGHT

The highest engagement on Instagram now comes from niche sports and pop culture communities, where shared identity and fandom drive deeper audience interaction than broad, mainstream categories.

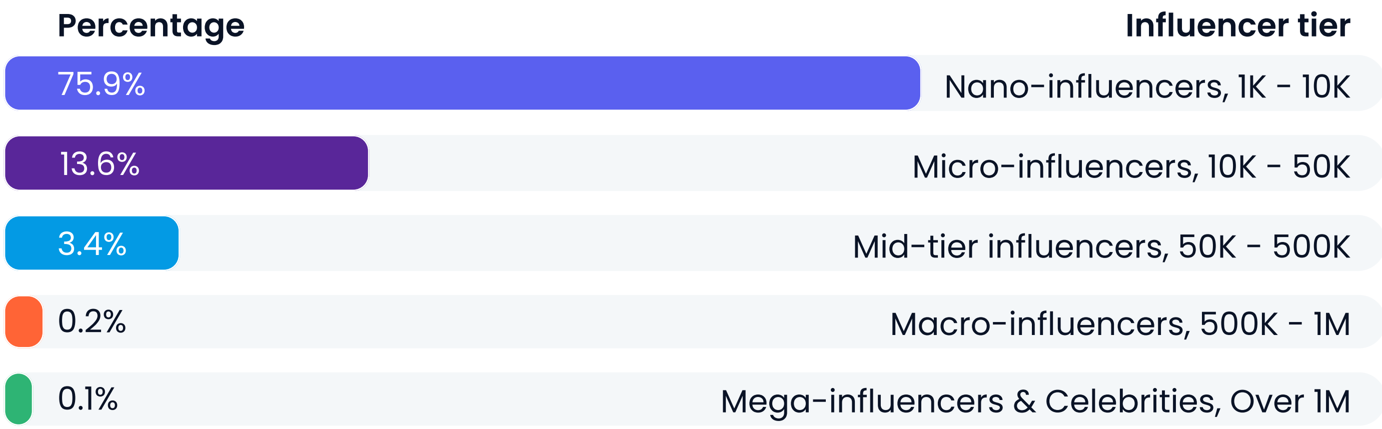
Rather than being dominated by broad, mass-appeal sports categories, **the highest engagement is now driven by niche sports and passion-based communities. Snowboarding leads all topics with an average ER of 4.01**, followed by **Comics and Hockey (both at 3.89),** underscoring the power of tightly connected fan bases.

Interest-driven categories such as **Golf (3.80)** and **Anime (3.76)** further highlight how culturally specific and identity-based content consistently outperforms broader lifestyle or general sports topics in terms of engagement.

While mainstream categories like **Football & Soccer (3.42)** and **Cricket (3.28)** remain highly visible on the platform, their engagement rates trail behind those of more specialized niches, reflecting the trade-off between scale and depth of interaction.

Overall, these patterns suggest that **Instagram engagement is increasingly concentrated in communities built around shared passions, expertise, and subcultures**, rather than mass-interest content alone.

MORE THAN 80% OF INSTAGRAM CREATORS ARE NANO-INFLUENCERS



Distribution of Instagram influencers by number of followers

Creators with **1,000–10,000 followers now account for 81.5% of all Instagram influencers**, up from previous levels, reinforcing the continued fragmentation and long-tail nature of the creator economy.

Micro-influencers (10K–50K) represent **14.4%** of creators, while **mid-tier influencers (50K–500K)** account for **3.8%**, highlighting the steep drop-off as follower counts increase.

At the top end of the spectrum, **macro-influencers and celebrities remain statistically rare**, together representing just **0.3% of all Instagram creators**, underscoring how concentrated reach remains among a very small elite.

Over four in five Instagram creators are nano-influencers, confirming that the platform's creator economy is built on scale at the long tail rather than a small number of large creators.

KEY INSIGHT

When planning an influencer marketing strategy, brands need to consider their objectives, target audience, and budget.

While mega-influencers and celebrities offer massive reach, nano and micro-influencers often provide higher engagement rates and closer connection with their followers. The right influencer tier depends on the specific goals and preferences of the brand's marketing campaign.

INSTAGRAM FOLLOWER GROWTH IN 2025 IS DRIVEN BY CREATORS, NOT JUST MEGA-ACCOUNTS

2336 Instagram accounts gained over 1 million followers in 2025

Account	Instagram Followers	2025 Followers' Growth	Followers' Growth, %	ER (%)
cristiano	669.2M	23.1M	3.5	0.6
bhajanmarg_official	37M	20.9M	56.5	1.3
mrbeast	82.3M	18.4M	22.5	0.8
ishowspeed	42.8M	15.8M	36.9	7.1
lamineyamal	39.8M	15.2M	38.2	6.8
ashtonhall	18.3M	14.7M	80.4	3.0
instagram	698.1M	14.2M	2.0	0.1
iamhussainmansuri	16.2M	12.4M	76.6	3.3
felca0	18.4M	12.3M	66.8	5.6
fcbarcelona	145.3M	11.8M	8.1	0.2

Instagram's fastest-growing accounts illustrate a clear split between **scale-driven growth** and **momentum-driven growth**.

Cristiano Ronaldo remains the most-followed individual on Instagram, adding over **23 million new followers**, reinforcing his unmatched global reach. However, his growth rate (3.5%) and engagement (0.6%) reflect the natural ceiling effects of mega-scale accounts.

In contrast, a significant share of follower growth is now driven by **creator-led and community-based accounts**. Profiles such as **ishowspeed, bhajanmarg_official, lamineyamal,** and **ashtonhall** recorded explosive percentage growth — often exceeding **50–80%** — alongside materially higher engagement rates.

This year's growth leaders span a wide range of content pillars, including **entertainment, gaming, sports fandom, spirituality, and creator personalities**, signaling that Instagram's growth engine is increasingly fueled by identity-driven communities rather than institutional or platform-owned accounts alone.

Even official and brand-owned profiles, such as **Instagram** itself and major sports clubs, continue to grow in absolute terms, but trail creators when it comes to engagement intensity and relative momentum.

KEY INSIGHT

While mega-accounts still dominate Instagram by reach, the platform's fastest growth increasingly comes from creator-led communities with strong identity, fandom, and cultural relevance.

TOP DECLINING INSTAGRAM ACCOUNTS: SELENA GOMEZ LOST 6.8 MILLION FOLLOWERS

Overall, 35% of accounts showed a decline in followers in 2025

Account	Instagram Followers	2025 Followers' Growth	Followers' Growth, %	ER (%)
selenagomez	416.3M	-6.7M	-1.6	0.58
beyonce	308.5M	-5.1M	-1.6	0.33
kendalljenner	285M	-5M	-1.7	0.51
kimkardashian	354.1M	-4.8M	-1.3	0.44
khloekardashian	300.2M	-4.8M	-1.5	0.03
nike	298.2M	-4.6M	-1.5	0.02
zendaya	176.2M	-4.4M	-2.53	2.92
natgeo	275.8M	-4.4M	-1.6	0.01
arianagrande	372.8M	-3.9M	-1.05	0.11
therock	391.3M	-3.5M	-0.90	0.03

Analysis of declining Instagram accounts shows that **audience contraction is no longer limited to smaller or inactive profiles.**

In 2025, several of the platform's most-followed celebrities and brand accounts experienced **multi-million follower losses**, led by **Selena Gomez**, who lost **6.8 million followers (–1.6%)** over the period.

High-profile figures across entertainment, fashion, and sports — including Beyoncé, the Kardashian-Jenner family, and major global brands — all recorded declines in the range of 1–2%, highlighting a broader recalibration of audience behavior rather than isolated performance issues.

Notably, **follower losses do not always correlate with weak engagement**. Accounts such as **Zendaya**, despite a –2.5% decline, continue to post comparatively high engagement rates, suggesting that unfollowing activity may reflect audience cleanup or shifting consumption habits rather than reduced influence.

Instagram's largest accounts are not immune to decline: multi-million follower losses among top celebrities point to changing audience expectations and platform dynamics.

ENGAGEMENT ON INSTAGRAM DECLINES WITH SCALE, WHILE ABSOLUTE INTERACTIONS GROW

	ER, %	Median Likes	Median Comments
Nano 1k-10k	1.78%	41	3
Micro 10k-50k	0.54%	91	5
Mid-tier 50k-500k	0.43%	353	10
Macro 500k-1M	0.35%	2,159	38
Mega over 1M	0.33%	6,678	88
Total	1.69%	40	3

Engagement Metrics by Influencer Tier

Engagement dynamics on Instagram continue to vary sharply by creator size.

Nano-influencers (1K–10K followers) retain the highest median engagement rate at 1.79%, confirming that smaller creators maintain stronger relative interaction with their audiences.

However, as follower counts increase, **engagement rates decline steadily**, reaching a median of **0.33–0.35%** among macro and mega influencers. This reflects the well-documented dilution effect of scale, where audience growth outpaces interaction intensity.

At the same time, **absolute interaction volumes rise dramatically with scale**. Mega-influencers generate a median of **6,600+ likes and nearly 90 comments per post,** far exceeding smaller creators in raw engagement totals despite lower percentage-based ER.

These patterns highlight a fundamental trade-off in influencer marketing: **nano-creators maximize engagement efficiency, while large creators deliver scale and visibility.**

Nano-influencers deliver the highest engagement rates on Instagram, while larger creators trade engagement efficiency for scale and total interaction volume.

FASHION, BEAUTY, AND ENTERTAINMENT BRANDS DOMINATE INSTAGRAM CONVERSATIONS

Brand username	Mentions	Influencers	Esti.impressions
@zara	128.2K	49.9K	3.8B
@sheinofficial	213.6K	38.9K	5.2B
@nike	77.7K	36.5K	2.4B
@hm	82.4K	35.7K	6.4B
@maybelline	74.4K	29.3K	4.9B
@amazon	69.6K	28.4K	2.8B
@youtube	70.5K	27.5K	2.4B
@netflix	43.6K	24.5K	5.5B
@yslbeauty	56.6K	23.6K	4.5B
@target	56.5K	22.6K	2.5B

Instagram brand conversations in 2025 continue to be shaped by a mix of **fast fashion, beauty, global retail, and entertainment platforms.**

Zara and Shein lead in creator adoption and mention volume, reflecting highly scalable influencer seeding models and constant content turnover. Shein, in particular, generates the **highest number of mentions,** translating into over **5.2 billion estimated impressions.**

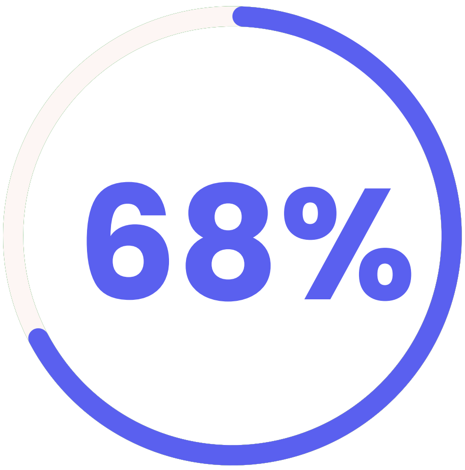
H&M stands out by reach, delivering the **largest estimated audience exposure (6.5B)** despite lower mention volume, suggesting a stronger reliance on higher-reach creators and campaign-driven activations.

Beauty brands such as **Maybelline** and **YSL Beauty** maintain strong visibility through consistent creator partnerships, while **Nike** remains a key player at the intersection of sports, lifestyle, and culture.

Beyond retail and fashion, **platform and entertainment brands** — including **YouTube, Netflix, Amazon, and Target** — demonstrate how Instagram increasingly functions as a distribution layer for broader digital ecosystems, not just product discovery.

The most talked-about brands on Instagram combine high creator volume with scalable content strategies, while reach leadership increasingly depends on creator mix rather than mention count alone.

TIKTOK TAKES CENTER STAGE IN ENTERTAINMENT FOR 2026



More than two-thirds (68%) of adult Gen Zers are inclined to make purchases on TikTok, on par with YouTube and trailing only Instagram, according to a recent survey by Jungle Scout.

In 2025, TikTok's growth continues to soar, with over **170 million users** in the U.S. alone, solidifying its position as one of the fastest-growing social platforms. Projections indicate this number will keep climbing, reaching **over 200 million by 2027**, an indicator of the app's sustained success and influence.

TikTok's immense popularity places it firmly among the top platforms for advertising, rivalling both YouTube and Instagram. For marketers and businesses, understanding user preferences and competitive dynamics on TikTok is essential for crafting impactful marketing strategies.

TIKTOK 2026 UPDATES: WHAT MATTERS FOR INFLUENCER MARKETING

TikTok continues to evolve into a performance-driven, commerce-enabled, and creator-first platform. The following updates are the most relevant for influencer marketing strategies.

Expansion of TikTok Shop and live shopping

1/5

TikTok is aggressively scaling its social commerce ecosystem, expanding **TikTok Shop** and **LIVE shopping** across new regions, including Europe and Latin America. Livestreams now play a growing role in driving both engagement and sales.

Why it matters:

Influencers are increasingly becoming **direct sales channels**, not just awareness drivers. TikTok enables measurable, lower-funnel creator campaigns with clear ROI.

Affiliate links and creator monetization tools

2/5

TikTok continues to expand **affiliate functionality,** allowing creators to embed product links directly in videos and earn commissions from sales.

Why it matters:

This accelerates the shift toward **performance-based influencer marketing**, where creators are rewarded for outcomes, not just reach.

Longer videos gain algorithmic traction

3/5

TikTok data shows that **videos longer than one minute generate significantly higher watch time** and stronger algorithmic distribution compared to shorter clips.

Why it matters:

Influencer content is moving beyond ultra-short formats toward: storytelling, education and product explanation. This creates more space for meaningful brand integrations.

Rapid expansion of AI-powered creation tools

4/5

TikTok's Symphony suite introduces **AI avatars, AI video editing, dubbing, translations, and caption suggestions**, all trained on top-performing TikTok content.

Why it matters:

AI lowers production barriers and increases content velocity, allowing influencers to scale output while staying aligned with platform trends.

Platform uncertainty increases the importance of diversification

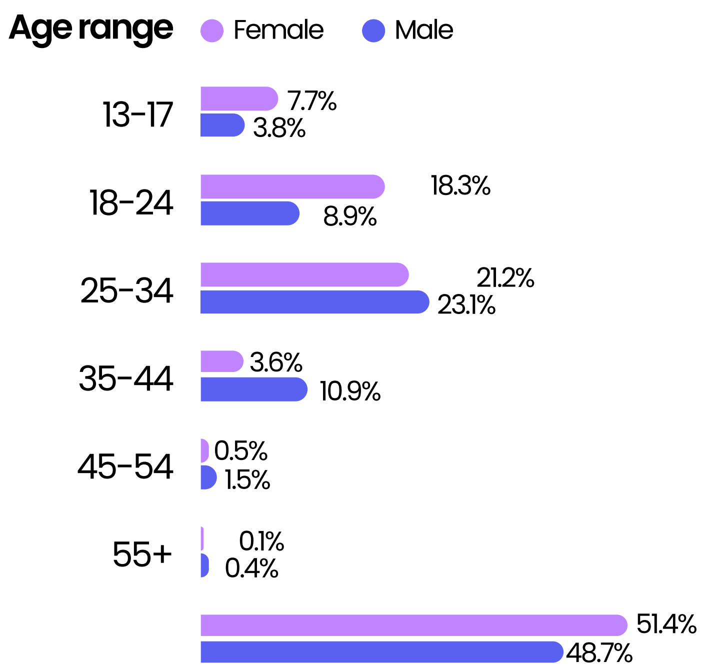
5/5

Ongoing regulatory uncertainty around TikTok's future in the U.S. has intensified creator and brand focus on **cross-platform presence** and audience portability.

Why it matters:

Brands and influencers are actively hedging risk by building multi-platform strategies, making TikTok a high-impact but not single-point-of-failure channel.

TIKTOK'S CORE AUDIENCE IS SHIFTING TO 25–34 (44%)



Distribution of TikTok audience by age and gender in 2025

TikTok's audience is no longer dominated by teenagers. The platform's **largest age group is now users aged 25–34**, accounting for **44.3%** of the global TikTok audience.

Men slightly lead within this core demographic (**23.1% vs 21.2% women**), signaling TikTok's growing relevance among adult, purchase-active users — particularly in categories such as entertainment, gaming, sports, and consumer tech.

Users **under 24 represent 38.7% of the audience**, confirming that TikTok still retains a strong Gen Z presence, while continuing to expand into older segments. Overall, the gender split remains close to balanced, with **51.4% female** and **48.7% male** users globally.

As with Instagram, there is a sharp drop-off among older age groups: **users 45+ account for just 2.5% of the TikTok audience**, reinforcing the platform's positioning around younger and early-millennial users.

KEY INSIGHT

TikTok is increasingly effective at reaching millennial audiences at scale, while maintaining its Gen Z foundation. For brands, this means the platform can no longer be viewed as "youth-only" — it now supports full-funnel influencer strategies, from cultural relevance to performance and conversion.

TIKTOK NANO- AND MICRO-INFLUENCERS HAVE THE HIGHEST ENGAGEMENT RATE

	ER, %	Median Likes	Median Comments
Nano 1k-10k	11.6	38	2
Micro 10k-50k	9.3	77	3
Mid-tier 50k-500k	7.6	209	6
Macro 500k-1M	6.8	1,091	21
Mega over 1M	6.8	3,213	48
Total	11.2	41	2

Engagement Metrics by Influencer Tier

To calculate ER on TikTok, we use a slightly different formula than that of Instagram. The total number of likes, comments, and shares is divided by the total number of views, multiplied by 100%:

$$\text{ER} = \frac{\text{Likes} + \text{Comments} + \text{Shares}}{\text{Views}} \times 100\%$$

Engagement Rate

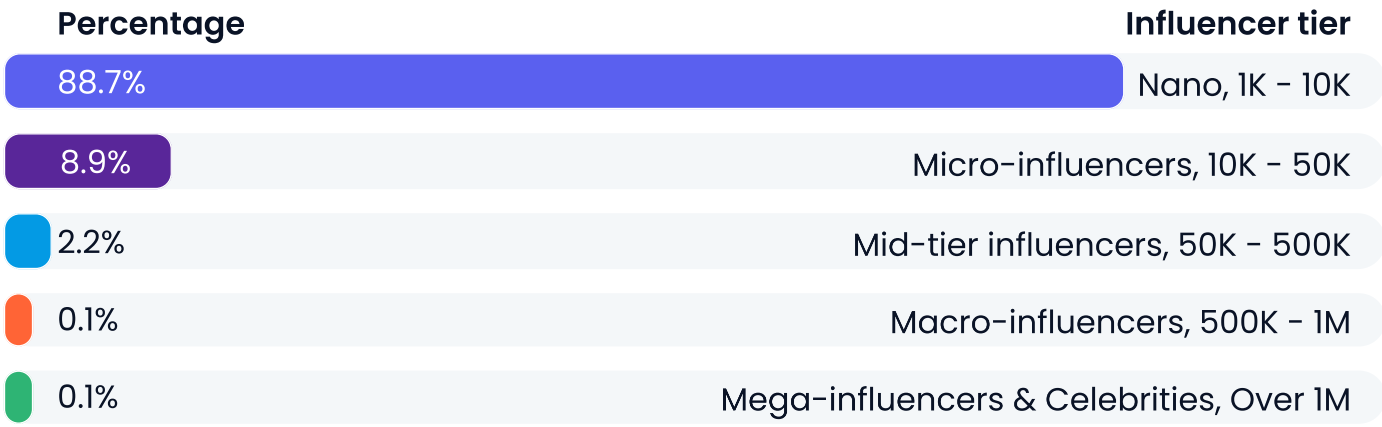
Recent data confirms that **engagement on TikTok declines as creator size increases**, reinforcing the platform's reputation as a content-first, rather than follower-first, ecosystem.

Nano-influencers (1K–10K followers) show the highest median engagement rate at **11.6%**, followed by **micro-influencers (10K–50K)** with **9.3%.** Engagement continues to decrease across larger tiers, reaching **6.8%** among both macro and mega influencers.

Despite this decline in engagement rate, **absolute interaction volumes scale with audience size**. Mega-influencers generate a median of **3,213 likes per video**, compared to **38 likes** among nano creators, highlighting the trade-off between engagement efficiency and reach.

Overall, the **median engagement rate across all TikTok creators stands at 11.2%**, underscoring TikTok's structurally higher interaction levels compared to other social platforms.

NEARLY 90% OF TIKTOK CREATORS ARE NANO-INFLUENCERS



Distribution of TikTok influencers by number of followers

The latest data shows that **TikTok's creator ecosystem is overwhelmingly driven by nano-influencers.** Creators with **1,000–10,000 followers account for 88.7% of all TikTok creators**, reinforcing the platform's highly fragmented, long-tail structure.

Micro-influencers (10K–50K) represent **8.9%** of creators, while **mid-tier influencers (50K–500K)** account for **2.2%,** highlighting the steep drop-off as follower counts increase.

At the top of the scale, **macro-influencers and celebrities** remain statistically rare, together representing just **0.2% of all TikTok creators**. This distribution underlines how concentrated reach on TikTok is, while content production and volume are driven almost entirely by smaller creators.

With HypeAuditor, brands can identify and activate TikTok nano- and micro-influencers at scale — while managing quality, risk, and performance.

TOP GROWING TIKTOK ACCOUNTS IN 2025

Account	TikTok followers	2025 follower growth	% follower growth	ER (%)
yahia_x	27.3M	19.9M	73	4.8
williesalim	83M	19.4M	23	3.4
fcbarcelona	62.1M	19.1M	31	17.0
mrbeast	123.3M	16.4M	13	6.8
realmadrid	69M	15.9M	23	15.3
steven.stenlyy	23.8M	14.9M	63	4.3
lamine.yamal	38.3M	14.8M	39	7.4
rivelsumigar	29.1M	14.2M	49	3.3
jasonmoments	23M	13.5M	59	1.8
moncluscarol	18.7M	12.7M	68	12.3

TikTok's fastest-growing accounts illustrate how audience growth increasingly comes from creator-led momentum and fandom-driven communities, rather than platform-owned or purely celebrity accounts.

Accounts such as **yahia_x, steven.stenlyy**, and **moncluscarol** recorded explosive growth rates of 60–70%, demonstrating TikTok's ability to rapidly scale emerging creators through algorithmic distribution.

At the same time, sports franchises and athletes remain among the strongest growth engines on the platform. **FC Barcelona** and **Real Madrid** each added over 15 million followers, while maintaining exceptionally high engagement rates, reflecting the power of global fandom and highlight-driven content.

Large-scale creator brands like **MrBeast** continue to grow in absolute terms, but at lower relative rates — reinforcing the natural ceiling effects of mega-scale accounts on TikTok.

On TikTok, the fastest follower growth is driven by creator momentum and fandom intensity, not just existing scale.

THE MOST TALKED-ABOUT BRANDS ON TIKTOK IN 2025

Brand username	Total mentions	Number of influencers	Views
@shein_official	81.3K	20.6K	3.2B
@sephora	34.6K	13.4K	2.5B
@rarebeauty	35.7K	11.8K	1.8B
@elfcosmetics	24.6K	11K	0.8B
@maybelline	28K	11K	3.6B
@lorealparis	26.3K	11K	8.3B
@fentybeauty	29.2K	10.6K	1.6B
@maccosmetics	24.5K	9.4K	1.7B
@yslbeauty	24.3K	9.2K	2.4B
@walmart	20.1K	9.1K	2B

TikTok brand conversations in 2025 are **overwhelmingly dominated by beauty and fast-fashion brands**, highlighting the platform's strength as a discovery and trend-driven channel for visually engaging consumer categories.

Shein leads by a wide margin in total mentions, driven by large-scale creator seeding and high content velocity. This reflects TikTok's ability to amplify brands that operate at speed and integrate deeply into creator ecosystems.

The rest of the top rankings are largely occupied by beauty brands, including **Sephora, Rare Beauty, Maybelline, L'Oréal Paris, Fenty Beauty, MAC Cosmetics,** and **YSL Beauty**. While mention volumes vary, several of these brands generate **billions of views**, underscoring TikTok's ability to translate creator adoption into massive reach.

Notably, r**each leadership does not always correlate with mention volume**. Brands such as L'Oréal Paris and Maybelline achieve outsized view counts relative to their number of mentions, indicating a stronger reliance on higher-reach creators and campaign-led amplification rather than sheer creator volume.

Outside of fashion and beauty, **Walmart** stands out as the only mass retail brand in the top 10, illustrating TikTok's growing relevance for large-scale commerce and everyday consumer brands.

YOUTUBE REMAINS ESSENTIAL FOR INFLUENCER MARKETING IN 2026

In 2025, **55% of internet users turn to videos** for insights about products or services before making a purchase, underscoring the growing reliance on video content in consumer decision-making.

As the second-most popular platform for influencer marketing, YouTube continues to solidify its importance, with **75% of marketers recognizing it as a crucial component** of their strategies.

Whether through long-form tutorials or trendy, catchy Shorts, YouTube has maintained its status as a powerhouse for influencing consumer behavior and driving sales. Brand looking to elevate their marketing strategy in 2025 could look at establishing a strong presence on YouTube to get a step closer toward deeper consumer trust and higher ROI.

YOUTUBE UPDATES: AI-POWERED AUTO-DUBBING, YOUTUBE HYPE, AND EXPANSION OF YOUTUBE PARTNER PROGRAM (YPP)

Keeping up with what's new on YouTube can be quite a challenge. To help keep you informed of major updates, we put together a list of YouTube features that were introduced in 2025

AI-powered auto-dubbing expansion: 1/4

YouTube expanded its AI-driven auto-dubbing feature to hundreds of thousands of channels, enabling creators to automatically translate their English videos into multiple languages, such as French, German, Hindi, Italian, Spanish, Indonesian, Japanese, and Portuguese.

Opportunities for influencer marketing

Influencers can expand their audience globally by automatically translating their content into multiple languages, making it easier to collaborate with international brands and connect with non-English-speaking audiences.

Introduction of YouTube Hype: 2/4

To support smaller creators, YouTube launched 'Hype,' a feature that allows users to 'hype' videos from channels with fewer than 500,000 subscribers. This system promotes content discovery and aids the growth of emerging influencers by showcasing the most-hyped videos on a leaderboard, thereby increasing their visibility.

Opportunities for influencer marketing

Smaller influencers can gain visibility and attract new brand partnerships by leveraging the 'Hype' feature to showcase their content to a broader audience, including brands scouting for emerging talent.

Enhanced shopping features in YouTube Shorts: 3/4

YouTube integrated shopping functionalities into its Shorts platform, enabling influencers to tag products directly in their short-form videos. This feature facilitates seamless social commerce, allowing viewers to purchase products without leaving the app.

Opportunities for influencer marketing

Influencers can seamlessly integrate product promotions into short-form content, driving direct conversions and creating high-impact campaigns for brands looking to capitalize on social commerce trends.

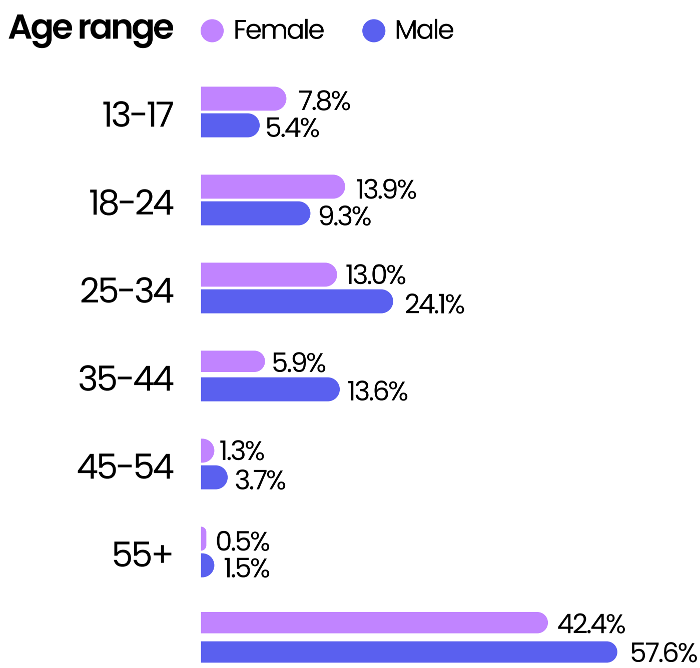
Expansion of YouTube Partner Program (YPP): 4/4

YouTube expanded the YPP, allowing more creators to monetize their content through ads, memberships, and merchandise shelf features. This expansion provides influencers with additional revenue streams and incentives to produce high-quality content.

Opportunities for influencer marketing

New influencers gain easier access to monetization tools, incentivizing them to create content consistently and partner with brands for monetized collaborations across multiple revenue streams.

64% OF YOUTUBE USERS ARE AGED BETWEEN 18 AND 34



Distribution of YouTube audience by age and gender in 2025

The latest data confirms that **YouTube's core audience remains firmly within the 18–34 age range**, which now accounts for **60.3% of all users globally**. Within this group, **25–34-year-olds form the single largest cohort (37.1%),** underscoring YouTube's strong appeal among young adults and early millennials.

This age segment also shows a pronounced gender skew. **Men dominate the 25–34 bracket,** representing 24.1% of total users, compared to **13.0% female**, reinforcing YouTube's positioning as a platform with particularly strong traction among male audiences in entertainment, gaming, tech, and long-form video consumption.

Users aged **18–24 make up 23.2%** of the audience, maintaining YouTube's relevance among younger viewers, while still trailing the older millennial segment in overall share.

Beyond the core audience, **35–44-year-olds account for 19.5%** of users, driven largely by male viewers.

Audience presence drops sharply among older age groups: users aged **45–54 represent 5.0%**, while those **55+ account for just 2.0%** of total users.

Overall, the gender split remains skewed toward men, with **57.6% male and 42.4% female users**, highlighting YouTube's continued differentiation from more female-skewed platforms such as Instagram.

YouTube remains a **millennial- and male-led platform**, particularly well-suited for longer-form content, product education, reviews, and expertise-driven creator partnerships. For brands, this reinforces YouTube's role as a key channel for **consideration- and intent-driven influencer marketing,** rather than purely trend-based discovery.

DISTRIBUTION OF YOUTUBE CHANNELS BY INFLUENCER TIERS

	% of creators
Nano 1k-10k	76.1
Micro 10k-50k	16.0
Mid-tier 50k-500k	6.8
Macro 500k-1M	0.6
Mega over 1M	0.5

YouTube's creator ecosystem is **heavily concentrated at the lower end of the follower spectrum,** reflecting the platform's long-tail structure.

Nano-creators (1K–10K subscribers) represent the vast majority of YouTube channels, accounting for **76.1% of all creators.** This highlights how most content production on YouTube is driven by smaller channels rather than a limited number of large publishers.

Micro-creators (10K–50K) make up an additional **16.0%**, meaning that more than **nine in ten YouTube channels (92.1%)** have fewer than 50,000 subscribers.

As subscriber counts increase, the number of channels drops sharply. **Mid-tier creators (50K–500K)** account for **6.8%** of channels, while **macro- and mega-creators** together represent just **1.1%** of the ecosystem. Channels with over 1 million subscribers remain extremely rare.

YouTube is a **depth-driven, long-tail platform** where scale is concentrated among a small number of top creators, but content volume and category expertise live primarily in the nano and micro segments. For brands, this reinforces the importance of:

- creator discovery beyond top-tier channels
- niche and expertise-driven partnerships
- portfolio-based influencer strategies rather than single-creator bets

DISTRIBUTION OF YOUTUBE INFLUENCERS BY CATEGORY IN 2025

YouTube's creator ecosystem is increasingly shaped by entertainment at scale, while still supporting a diverse mix of cultural, value-driven, and lifestyle-focused content categories.

Category	%
Entertainment	20.2
Funny Videos	11.8
Gaming	8.8
Dance	7.9
Social Issues	7.6
Music	6.9
Toys & Games	6.9
Religion & Spirituality	6.8
Outdoor Lifestyle	6.4
Kids	5.4

The latest data shows a clear shift toward **entertainment-led and culture-driven content** on YouTube.

Entertainment is now the dominant category, accounting for **20.2%** of all YouTube influencers. This highlights YouTube's continued evolution into a platform centered on broad, high-engagement content formats designed for mass consumption.

Funny Videos (11.8%) and **Gaming (8.8%)** follow, reinforcing YouTube's strength in humor, play, and interactive entertainment — categories that benefit from repeat viewing and strong community dynamics.

Performance-based and lifestyle-oriented categories also hold a significant share.

Dance (7.9%) and **Music (6.9%)** remain core creative pillars, while **Outdoor Lifestyle (6.4%)** reflects sustained interest in experiential and aspirational content.

Notably, **Social Issues (7.6%)** and **Religion & Spirituality (6.8%)** emerge as prominent categories, indicating that YouTube continues to function as a platform for **identity, values, and long-form discussion**, beyond pure entertainment.

Family- and youth-oriented content also plays a meaningful role, with **Toys & Games (6.9%)** and **Kids (5.4%)** rounding out the top categories.

TOP GROWING YOUTUBE ACCOUNTS IN 2025

Account	YouTube Subscribers (M)	2025 YouTube Subscribers Growth (M)	Subscribers Growth(%)	ER (%)
mrbeast	455.5	115.6	25.4	2.29
kimpro828	126.6	50.0	39.5	0.79
alejoigoa	98.6	41.2	41.8	2.07
topperguild	82.4	29.1	35.3	1.83
bispobrunoleonardo	66.8	28.1	42.1	38.07
stokestwins	133.5	27.4	20.5	1.16
alanchikinchow	98.4	26.8	27.3	1.54
tseries	308.5	25.9	8.4	2.28
mastersofprophecy	35.9	25.3	70.6	0.66
double_date	26.8	23.3	86.8	1.39

MrBeast remains the undisputed growth leader, adding **over 115 million subscribers** in a single year and reinforcing the power of high-production, globally resonant content. However, the list is not dominated by megacreators alone. Several mid- and large-size channels demonstrate **exceptionally high percentage growth,** indicating rapid momentum rather than pure scale effects.

Notably, some creators with smaller total subscriber bases show **stronger relative growth rates**, exceeding 40–80% year-over-year, highlighting YouTube's continued ability to surface and accelerate emerging creators through algorithmic discovery.

Engagement rates across the list vary significantly, underscoring that **rapid audience growth does not always correlate with high engagement,** and reinforcing the importance of evaluating both scale and audience interaction when assessing creator influence.

IMPORTANT INFLUENCER MARKETING TRENDS TO WATCH RIGHT NOW

From Reach to Trust: Trust Becomes the New Currency 1/5

Audience size is no longer the primary indicator of influence. Brands increasingly evaluate creators through authentic engagement signals — comment quality, sentiment, and consistency — as algorithmic feeds move toward topic- and interest-based discovery.

What this means:

Trust-based metrics and AI-powered authenticity checks are becoming essential to protect brand equity and drive performance.

Micro & Nano Creators Become the Performance Engine 2/5

Micro- and nano-influencers are now the most effective tier for engagement and conversion, combining niche authority with loyal communities and lower acquisition costs.

HypeAuditor insight:

In 2025, 60% of all Instagram posts tagged with #ad were published by creators with fewer than 50K followers — confirming that branded communication is increasingly driven by smaller creators.

AI + Human Creativity: Acceleration, Not Replacement 3/5

AI is now embedded across influencer workflows — from creator discovery and fraud detection to content ideation and performance prediction. However, human authenticity remains the decisive factor audiences respond to.

HypeAuditor insight:

83% of Instagram influencers have already used AI tools for content creation in 2025, with adoption expected to become nearly universal in 2026.

Ethics, Transparency & Regulation Take Center Stage 4/5

Clear ad disclosure and ethical communication are moving from best practice to baseline requirement, driven by both regulation and audience expectations.

HypeAuditor data point:

In 2025 only 6% of sponsored or sponsor-like posts currently include proper ad disclosure — a gap that will increasingly be enforced by platforms and regulators.

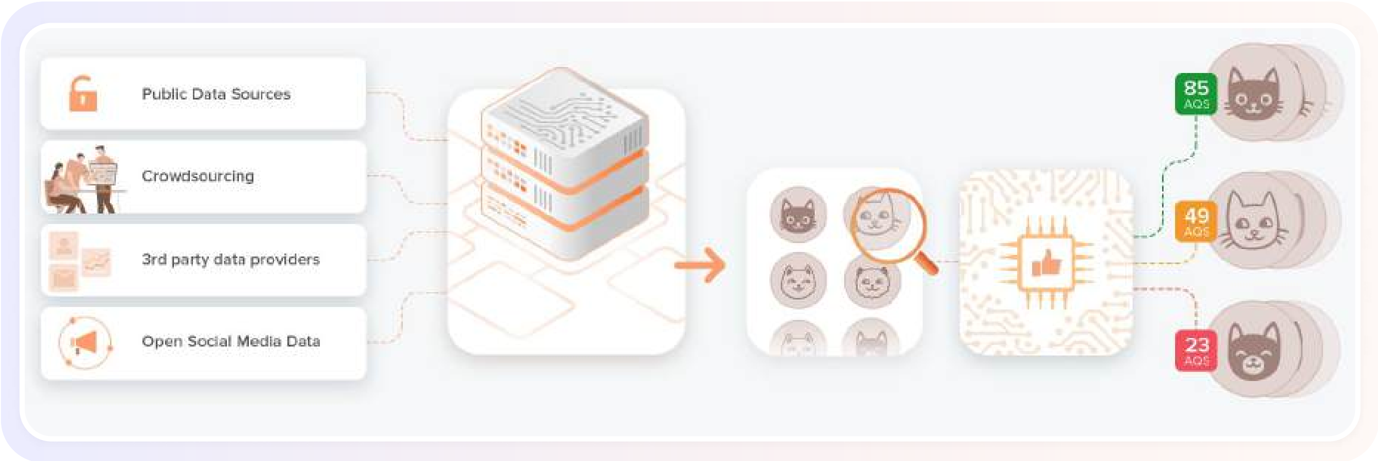
Platform uncertainty increases the importance of diversification 5/5

Short-form video continues to outperform all other formats across Instagram, TikTok, and YouTube Shorts, driving reach, sharing, and conversion.

HypeAuditor regional insight:

In 2025, 54% of all influencer content in 2025 was short-form video, confirming its dominance in high-growth creator markets.

METHODOLOGY



The report uses data from a wide variety of sources, including market research agencies, the internet, social media companies, news media, and our internal analysis.

We have collected and aggregated open data from a variety of sources: social platforms, catalogs, websites, crowdsourcing, and many more. After that, we processed the data by anonymizing, sorting and structuring, cleaning, and removing any irregularities, and enriching the data.

Then we transformed the data into intelligent estimations by using best-in-class estimation and machine learning algorithms developed by our team of leading data scientists and influencer marketing experts. The research conducted by HypeAuditor involved the analysis of **88.7 million Instagram, 14.5 million YouTube, and 102 million TikTok** influencer accounts from our internal database.