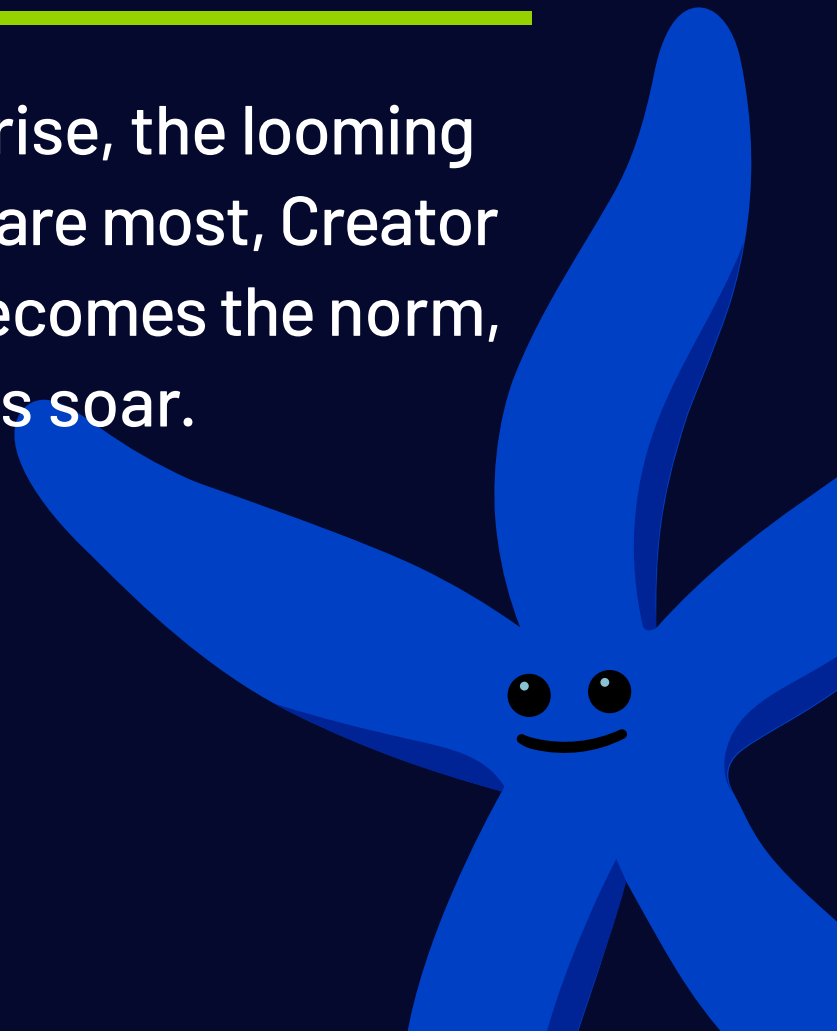


LINQIA

2025 STATE OF INFLUENCER MARKETING

Budgets continue to rise, the looming TikTok ban doesn't scare most, Creator Generated Content becomes the norm, and AOR partnerships soar.

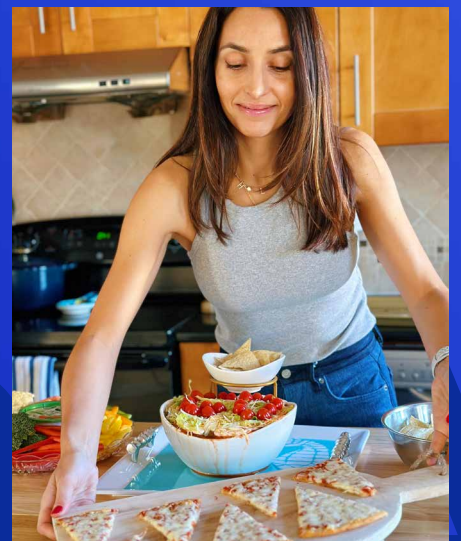


AN INDUSTRY EVOLVING

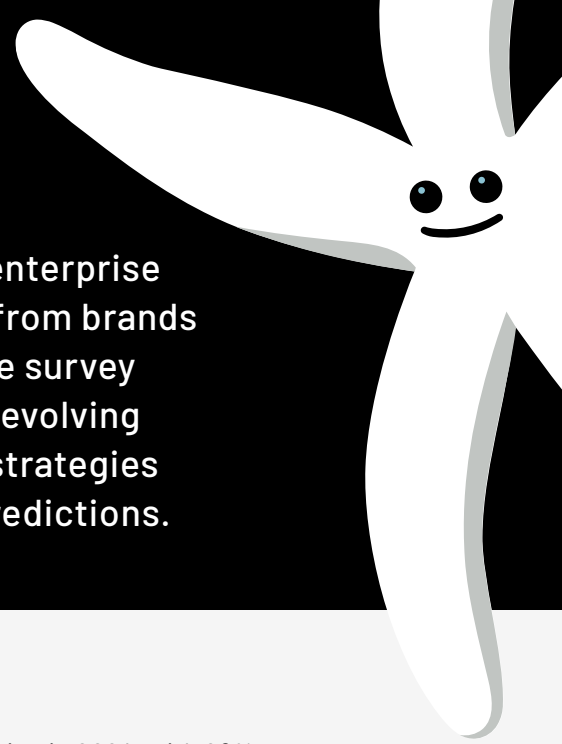
Influencer marketing has become a must for brands, with the question no longer being **if** they should invest, but rather **how much** they should invest.

As brands continue to see the value of their influencer investments, and begin leveraging the content generated by creators across all marketing channels, they are increasingly looking for specialist partners to help scale and effectively measure performance, providing apples to apples comparisons against their other marketing channel investments.

In this year's State of Influencer Marketing survey, we focused on how enterprise marketers spend their influencer marketing dollars and how they measure success. The answers begin to paint a very clear picture of where the industry is heading in 2025.



TOP 5 INSIGHTS



Linqia, the leading influencer marketing agency for enterprise brands, surveyed over 200 US enterprise marketers from brands and agencies activating with influencers in 2024. The survey ran from July-September 2024. The results show an evolving industry, with important trends and signals for how strategies will evolve in 2025. Here are the top 5 insights and predictions.



BUDGETS ARE SCALING FAST

88% of marketers reported their influencer budgets increasing in 2024, with 28% saying they are spending above \$5M. Given those numbers were 59% and 10% just one year ago, we anticipate investments to continue to accelerate heavily in 2025.



BRANDS NOT SCARED BY THE POTENTIAL TIKTOK BAN

66% of respondents said that the potential ban has not caused them to pause or stop their TikTok efforts in any way, and for the second year in a row TikTok came in second as the most important influencer platform (behind Instagram).



MEDIA REMAINS A CRITICAL PIECE OF THE PUZZLE

64% of marketers are spending at least half of their influencer budgets on media, with 94% of marketers using influencer content outside of the influencers' organic posts. Brand organic and paid social see the most usage, with website, email, and display rounding out the top 5.



CREATOR GENERATED CONTENT (CGC) TAKES CENTER STAGE IN 2024

81% of marketers are working with creators to generate content for their brand without those creators posting to their channels, and sponsored content, ambassadors, and UGC/CGC are the most common types of creator partnerships.



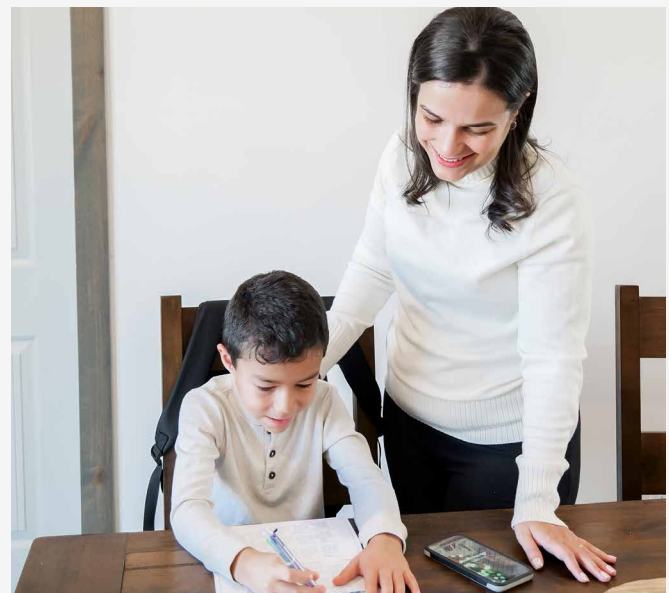
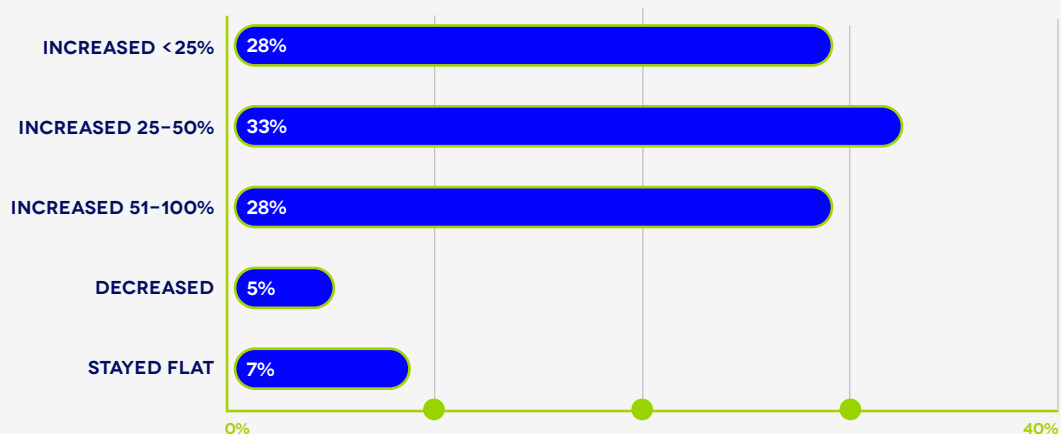
MARKETERS ARE ABANDONING TRADITIONAL AGENCIES AND MOVING TO AOR'S

Only 9% of respondents said they are working with a PR, Media, or Creative agency to execute their influencer work, while 28% are working with a specialized influencer marketing agency. And while 82% are using more than one partner in 2024, 76% said they plan to have a single influencer agency of record in 2025.

INFLUENCER BUDGETS CONTINUE TO SKYROCKET

89% of marketers reported their influencer budgets increasing in 2024 (vs. 59% in 2023). Of those who had budgets increase, 28% saw an increase of 51-100%. Interestingly only 5% said their budget decreased, despite the tough economic environment.

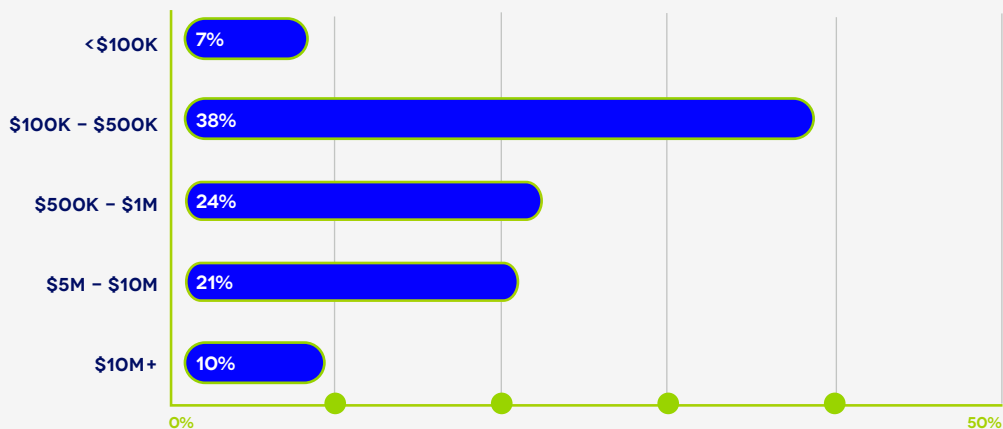
HOW DID YOUR BUDGET FOR INFLUENCER MARKETING CHANGE IN 2024 VS 2023?



INFLUENCER MARKETING BUDGETS ARE GROWING

Influencer marketing is clearly no longer a test and learn tactic. In fact, 31% of respondents said they are spending over \$5M on influencer marketing in 2024, compared to just 10% in 2023. Interestingly, only 7% said they are spending under \$100k.

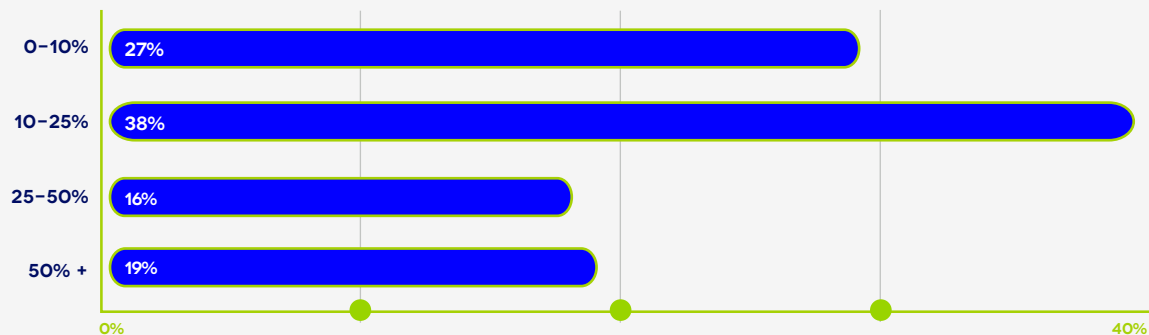
HOW MUCH WILL YOUR COMPANY INVEST IN INFLUENCER MARKETING IN 2024?



INFLUENCER COMPRISES A GREATER SHARE OF THE MARKETING PIE

Many marketing leaders are asking themselves how much of their total budget should be allocated to influencer marketing. For 35% of respondents, influencer marketing makes up more than 25% of their total marketing budgets.

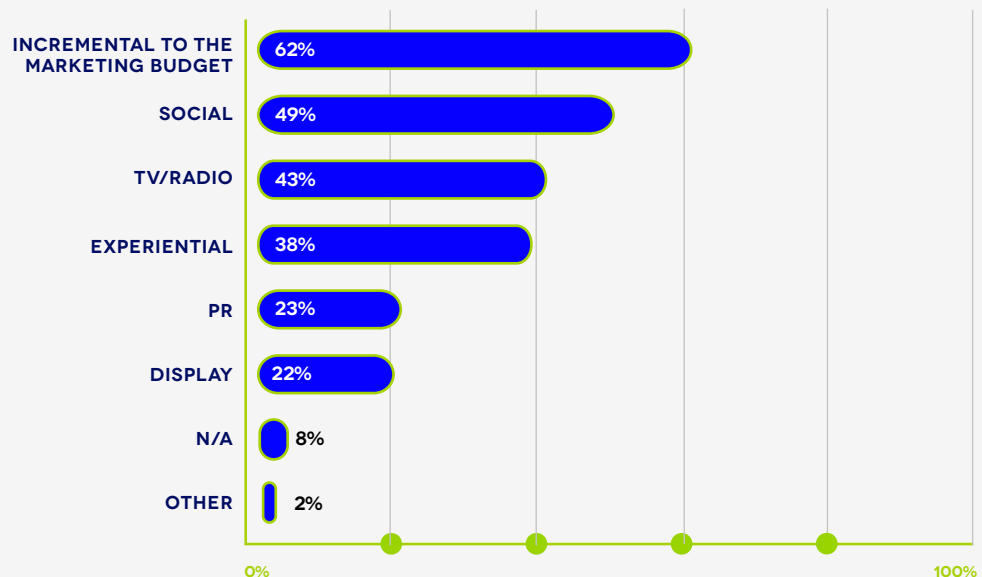
WHAT PERCENTAGE OF YOUR TOTAL MARKETING BUDGET GOES TO INFLUENCER MARKETING?



BUDGETS ARE SHIFTING TO INFLUENCER MARKETING FROM OTHER CHANNELS

Of those who increased their influencer budgets in 2024, 62% said they received incremental funds to support the increase, 49% said funds came from the social budget, and 43% said a portion of funding came from TV/Radio.

IF THE BUDGET INCREASED, WHERE DID THAT FUNDING COME FROM?



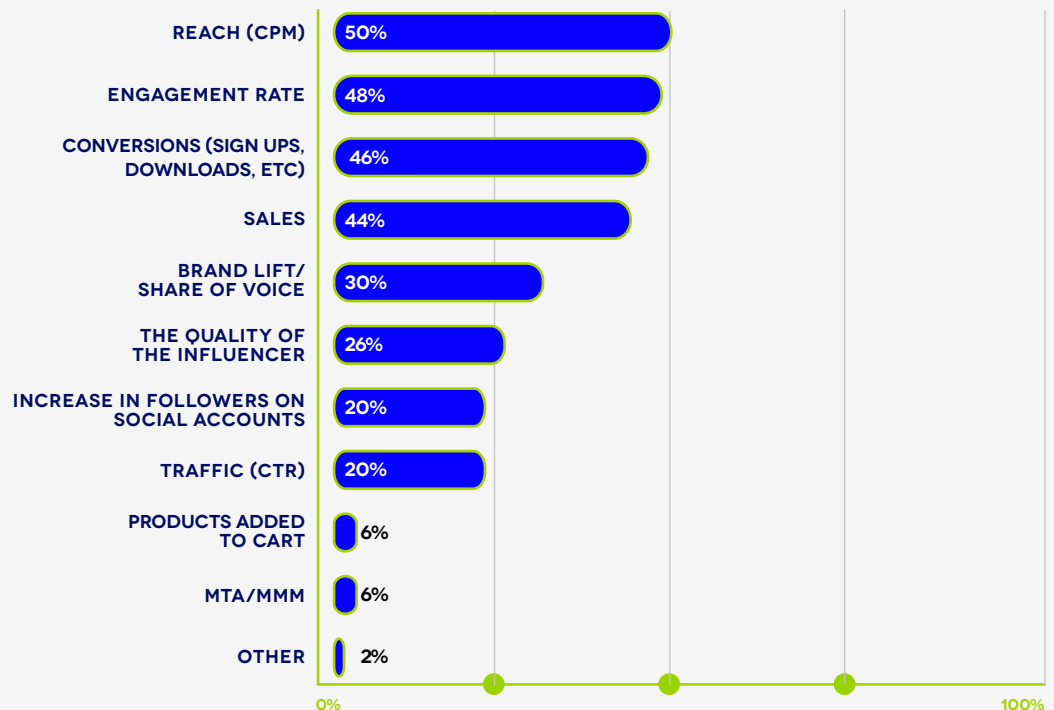
62%

RECEIVED INCREMENTAL FUNDS TO SUPPORT THE INCREASE

REACH IS THE NEW TOP MEASURE OF SUCCESS

Reach was listed as a top 3 measure of success by 50% of respondents, the most of any metric. Surprisingly, Engagement Rate fell to #2 with 48% (down from 69% in 2023), and Conversions rose to #3 with 46% (up from 35% in 2023).

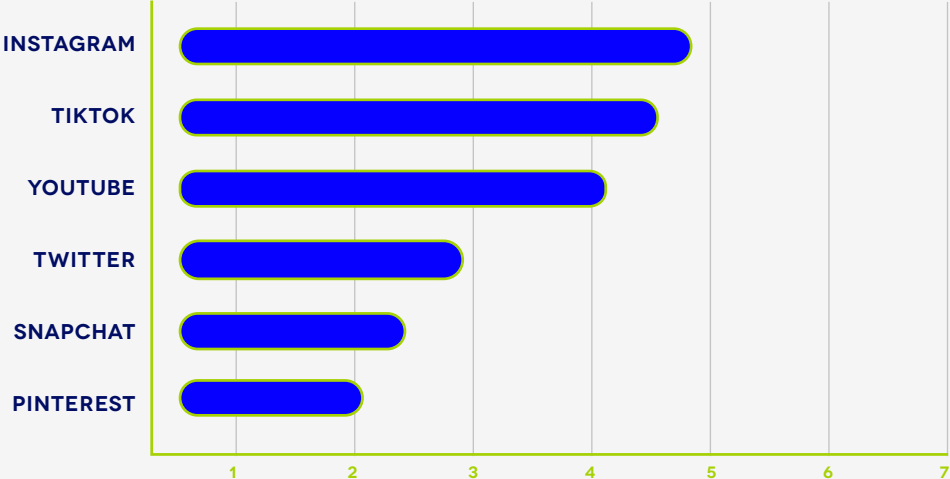
WHAT ARE YOUR TOP 3 MEASURES OF SUCCESS FOR YOUR INFLUENCER MARKETING PROGRAMS?



INSTAGRAM IS STILL THE MOST IMPORTANT PLATFORM

Instagram still reigns supreme, listed as the #1 priority influencer platform by 40% of marketers, while TikTok came in close second, and YouTube third. Twitter, Snapchat, and Pinterest rounded out the top 5 with very similar usage scores.

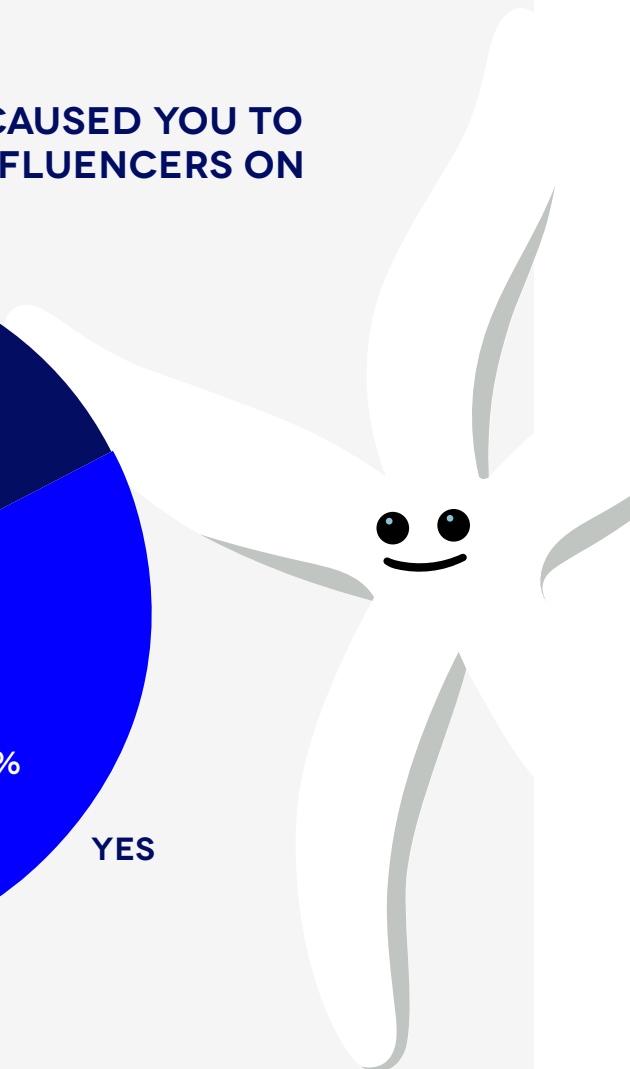
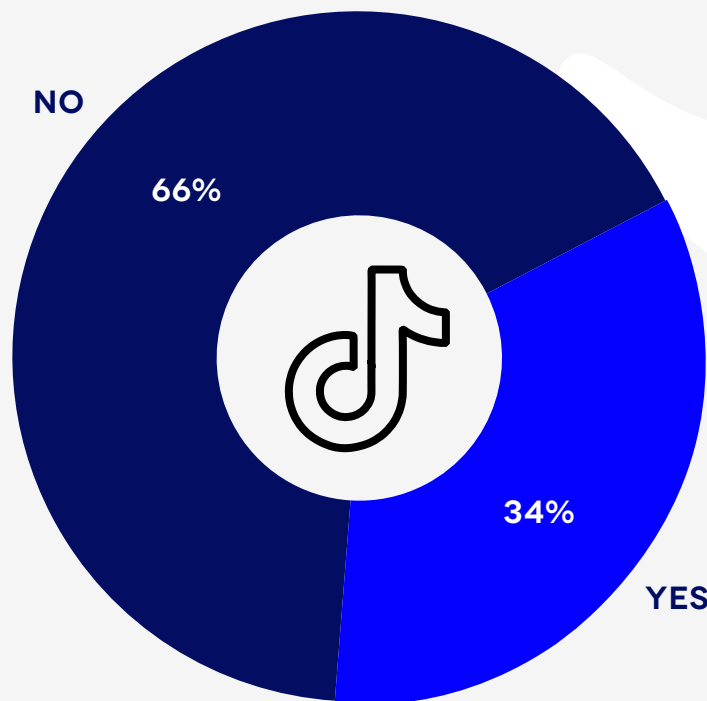
**RANK THE FOLLOWING SOCIAL PLATFORMS
IN ORDER OF IMPORTANCE TO YOUR
INFLUENCER EFFORTS.**



POTENTIAL TIKTOK BAN DOESN'T IMPACT 66% OF MARKETERS

Despite the fact that TikTok is on a path to being banned, unless the US courts rule in their favor or they choose to divest to American ownership, 66% of our survey respondents said that the potential ban has not caused them to pause or stop their TikTok efforts in any way.

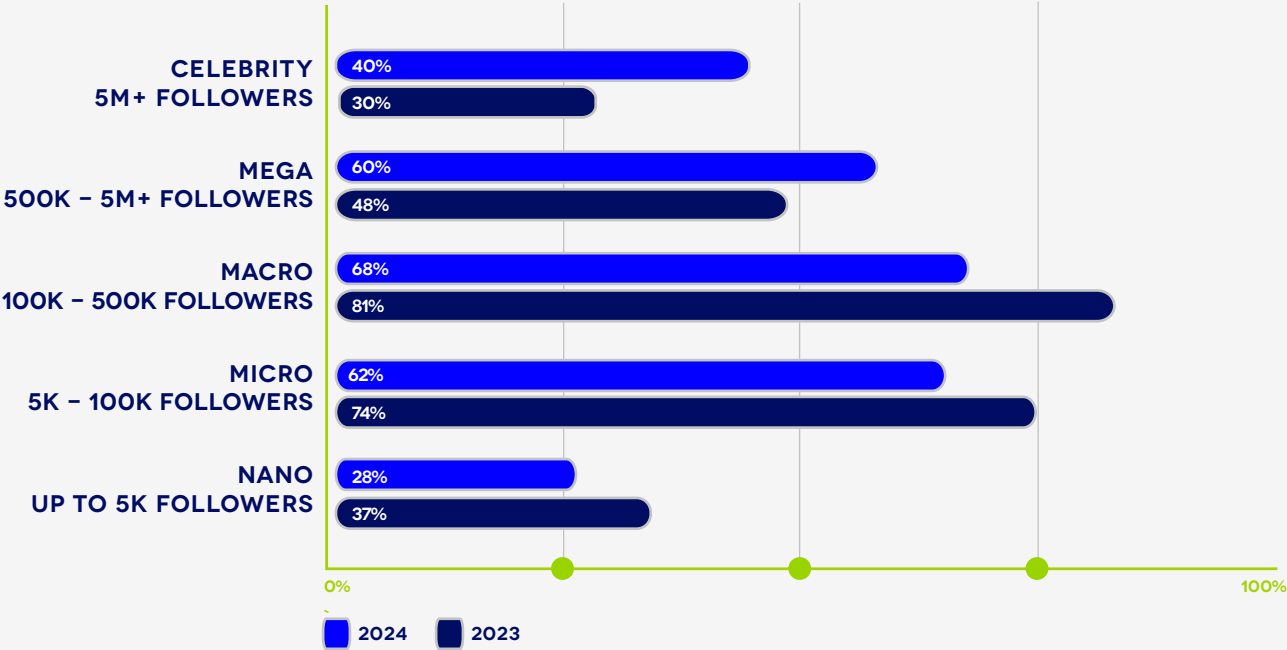
HAS THE POTENTIAL TIKTOK BAN CAUSED YOU TO PAUSE OR STOP WORKING WITH INFLUENCERS ON THE PLATFORM?



MACRO TIER TAKES FIRST POSITION AGAIN

For the second year in a row, macro creators, who have 100k-500k followers, took the top spot, with 68% of marketers saying they work with the macro tier. Micro took the second spot for the second year in a row, while mega and celebrity tiers had the greatest increase year over year, going from 48% to 60% and 30% to 40% respectively.

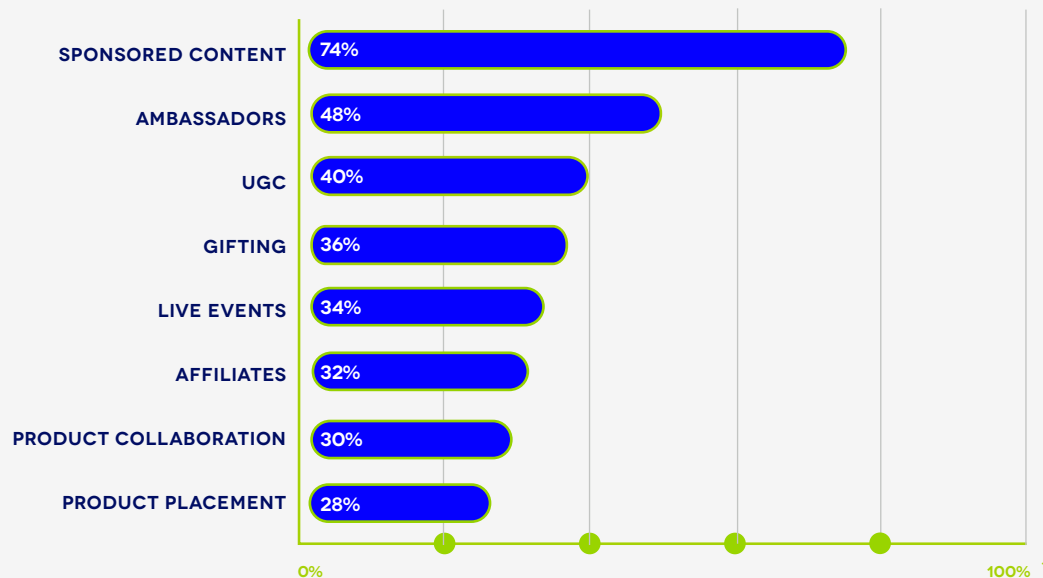
WHAT TYPE OF INFLUENCERS DO YOU PLAN TO WORK WITH IN 2024?



SPONSORED CONTENT, AMBASSADORS, AND UGC ARE MOST COMMON TYPES OF CREATOR PARTNERSHIPS

Sponsored Content is the #1 type of partnership, with 74% of marketers saying that is how they primarily work with creators. Ambassadors followed with 48% and User-Generated Content (UGC) at 40%.

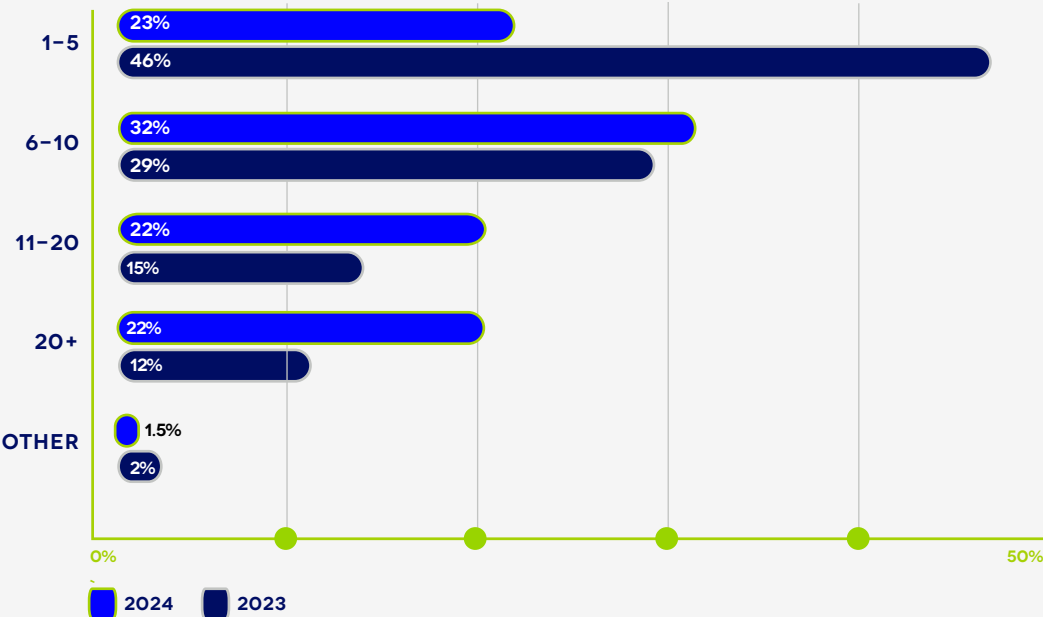
IN WHAT CAPACITY ARE YOU WORKING WITH INFLUENCERS/CREATORS?



BRANDS ARE BACK TO A SCALED INFLUENCER APPROACH

Last year, we saw the vast majority of marketers moving to a “fewer and bigger” approach with 46% of respondents saying they typically activate 1-5 influencers on a program. That number fell to 23% in 2024, and the top spot went to 6-10 influencers at 32% (up from 29% in 2023). The greatest upticks year over year were 11-20 influencers (22% in 2024 vs. 15% in 2023), and 20+ influencers (22% in 2024 vs. 12% in 2023).

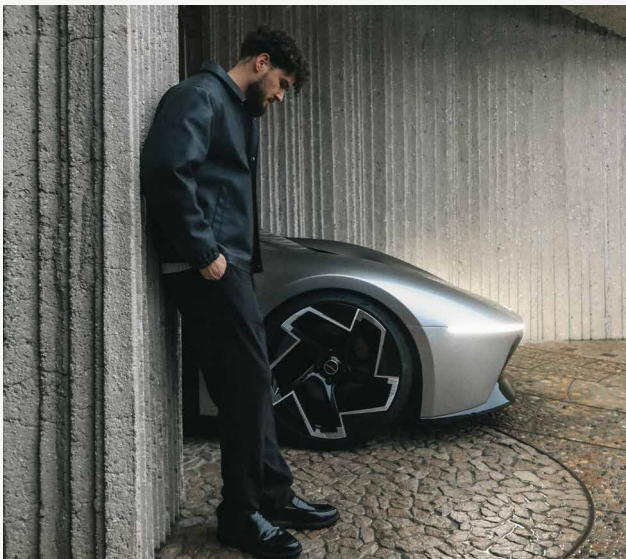
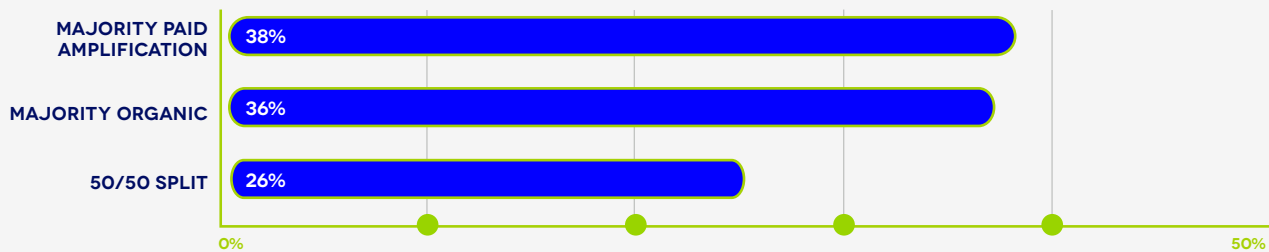
HOW MANY INFLUENCERS DO YOU TYPICALLY ACTIVATE ON A PROGRAM?



PAID MEDIA REMAINS A MAJOR DRIVER

Similar to last year's survey results, paid media continues to comprise a large percentage of influencer marketing investments. 64% of respondents said that at least 50% of their influencer budgets are going toward media amplification.

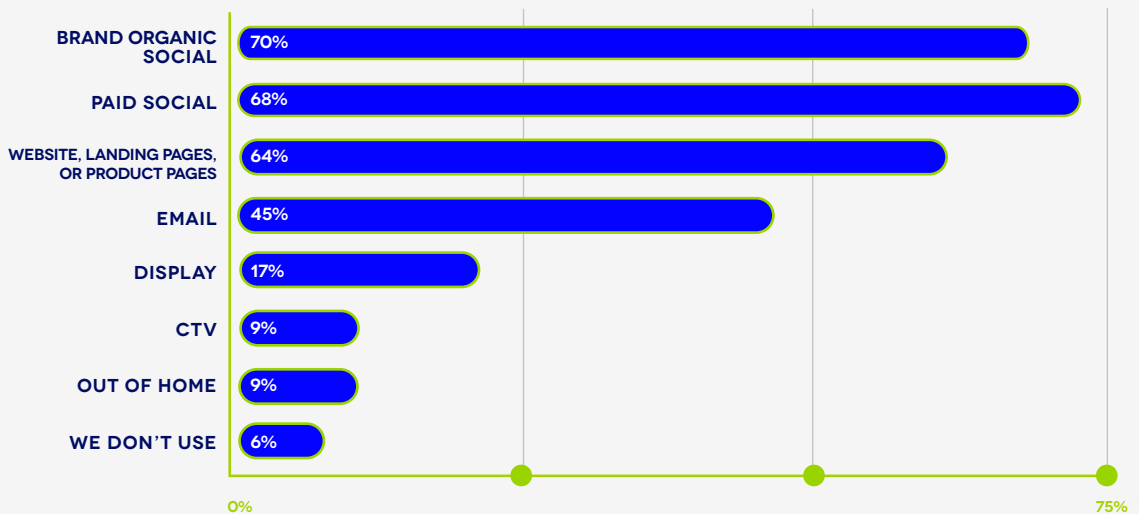
WHAT PERCENT OF YOUR INFLUENCER MARKETING BUDGET GOES TO ORGANIC INFLUENCER POSTS VS. PAID MEDIA/AMPLIFICATION?



MARKETERS ARE USING INFLUENCER CONTENT EVERYWHERE

94% of respondents are using influencer content outside of the creators wall, with Brand Organic (70%) and Paid Social (68%) as the top two channels, followed by Website, Email, Display, Connected TV (CTV) and Digital Out-Of-Home (OOH).

WHICH CHANNELS DO YOU PLAN TO USE INFLUENCER CONTENT FOR?



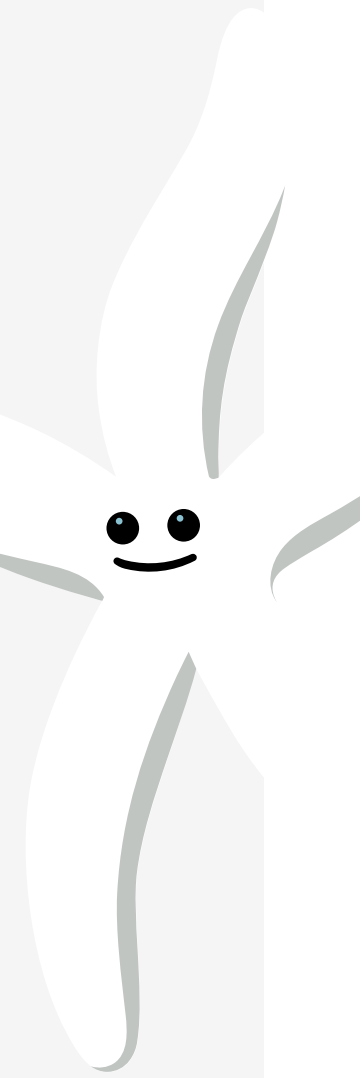
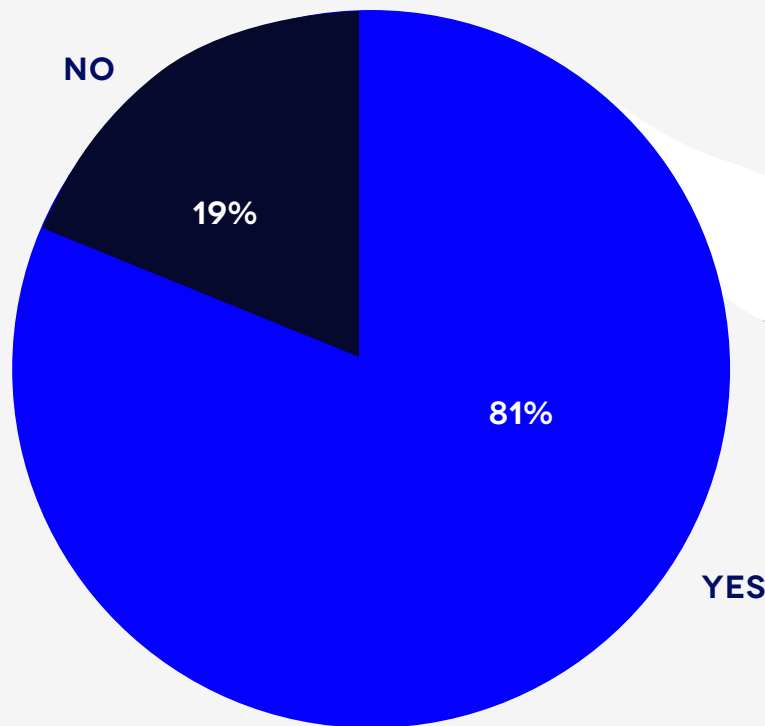
94%

USING INFLUENCER CONTENT
OUTSIDE OF THE CREATORS WALL

CGC TAKES CENTER STAGE IN 2024

A whopping 81% of marketers are working with creators to generate content for their brand without those creators posting to their channels. This is up significantly from 58% in 2023, demonstrating how much brands need creators for content as much as their reach and influence.

ARE YOU WORKING WITH CREATORS IN 2024 TO PROVIDE CONTENT WITHOUT THE CREATOR POSTING TO THEIR FEEDS?



TOP CHALLENGES REMAIN DETERMINING ROI AND FINDING THE RIGHT INFLUENCERS

53% of respondents cite determining the ROI as their number one challenge with influencer marketing. Finding the right influencers came in second with 43% of respondents.

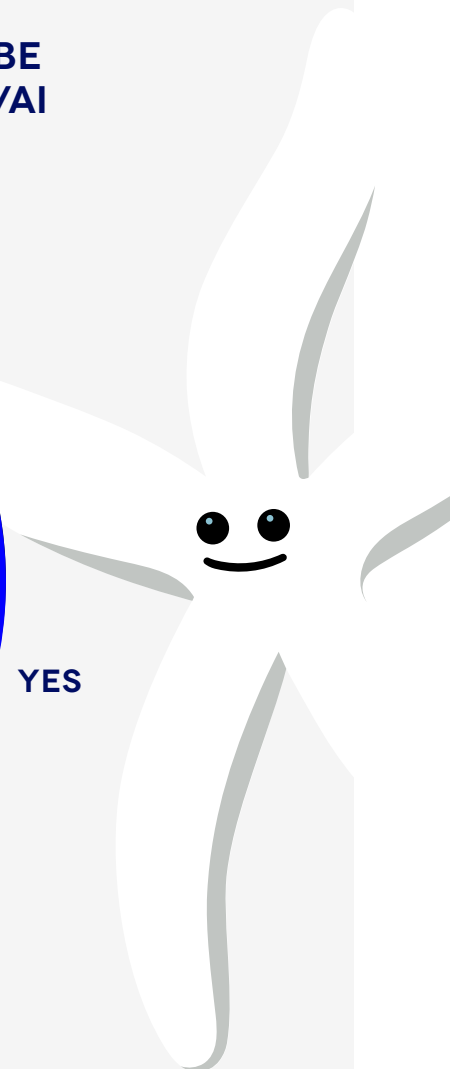
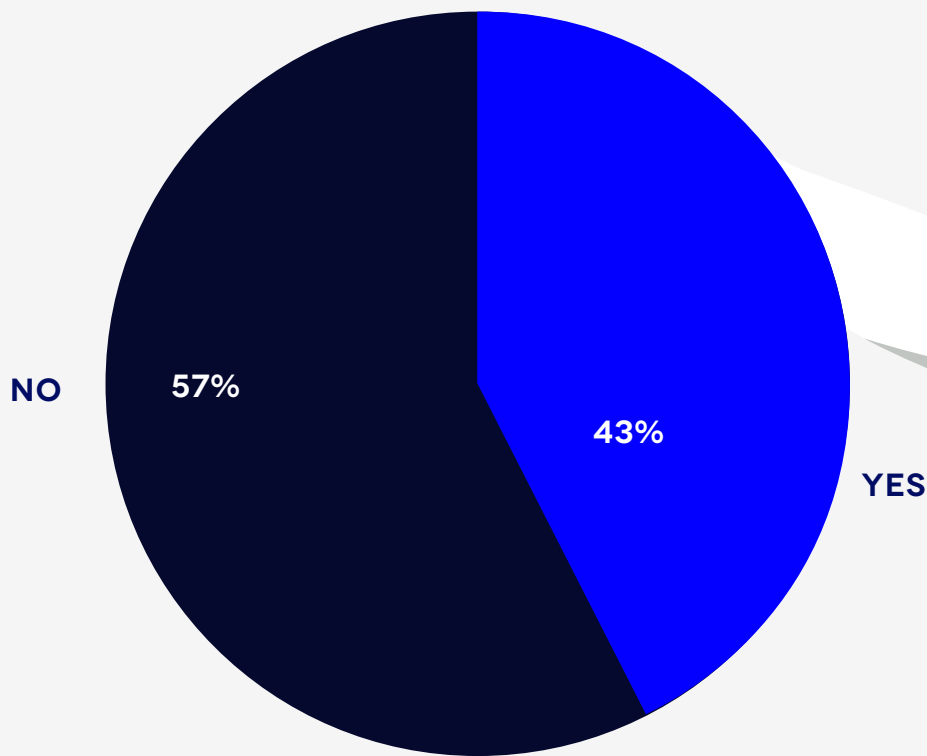
WHAT ARE THE TOP CHALLENGES WITH INFLUENCER MARKETING IN 2024?



MOST MARKETERS HAVE NO DESIRE TO WORK WITH VIRTUAL INFLUENCERS

57% of respondents said they are not interested in working with virtual or AI generated influencers, despite the recent media hype and feature releases from the major social platforms.

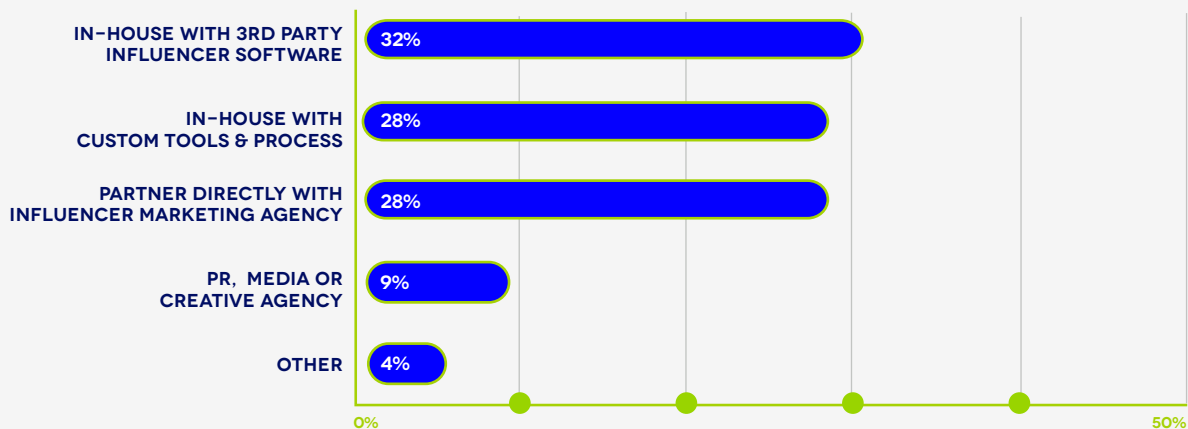
ARE YOU PLANNING TO OR WOULD YOU BE INTERESTED IN WORKING WITH VIRTUAL/AI INFLUENCERS?



MARKETERS ABANDON TRADITIONAL AGENCIES FOR INFLUENCER SPECIALISTS

Only 9% of respondents said they are working with a PR, Media, or Creative agency to execute their influencer marketing work, down from 20% in 2023. Conversely, 28% are working with a specialized influencer marketing agency.

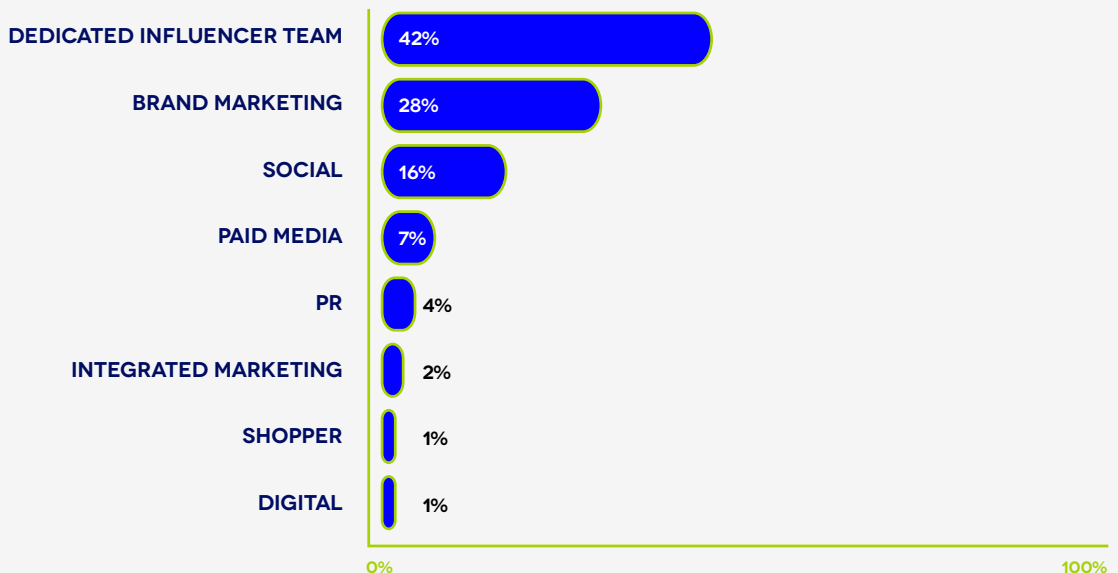
HOW ARE YOU MANAGING INFLUENCER MARKETING PROGRAMS IN 2024?



NUMBER OF DEDICATED INFLUENCER ROLES AT BRANDS ARE GROWING

Influencer marketing is becoming a common role and function at most major brands. According to our study, 42% of brands executing influencer marketing in 2024 said they have dedicated influencer teams leading those efforts. This is up significantly from 24% in our 2023 study.

WHAT TEAM PRIMARILY LEADS INFLUENCER MARKETING AT YOUR COMPANY?



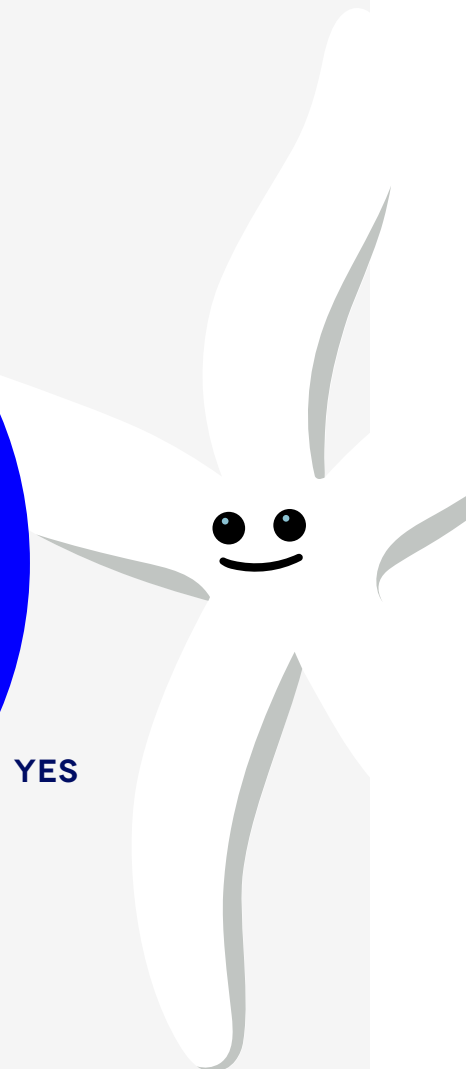
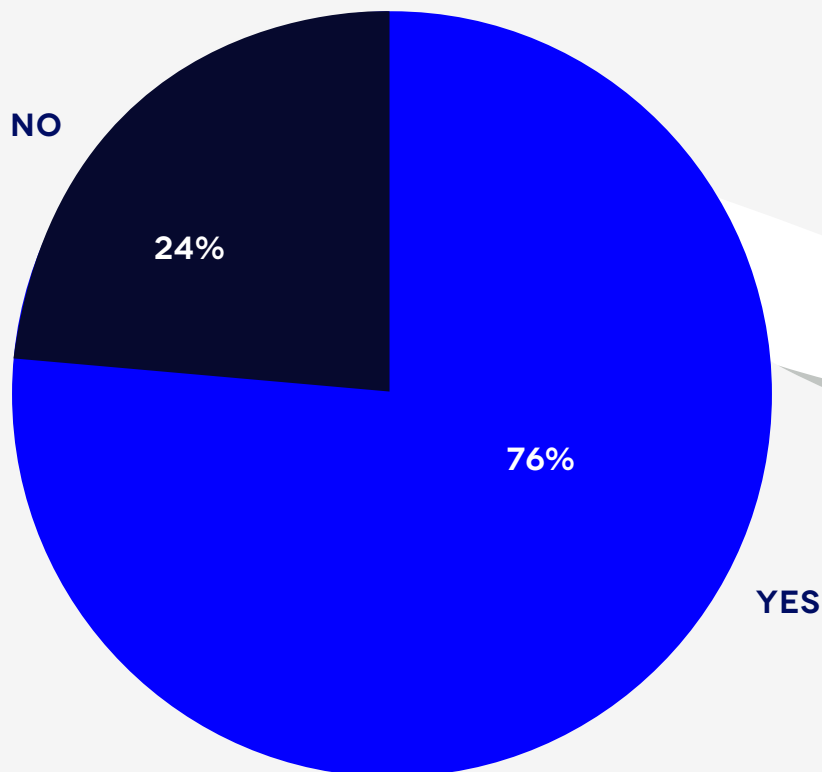
642%

OF BRANDS HAVE DEDICATED INFLUENCER TEAMS

INFLUENCER MARKETING IS MOVING INTO THE AGE OF AOR

A whopping 76% of respondents said they plan to have a single influencer agency partner as an Agency of Record (AOR) in 2025. Considering 82% are using more than one partner in 2024, that is a very clear signal of where the industry is heading.

DO YOU PLAN TO HAVE A SINGLE INFLUENCER MARKETING AGENCY OF RECORD (AOR) IN 2025?



CONCLUSION

Influencer marketing is becoming a significant investment area for marketers, and as budgets continue to increase, so does the pressure to effectively measure its performance. The ability to demonstrate brand lift, engagement, traffic, or conversions (depending on the campaign goal) with every influencer activation will be a necessary part of the industry's sustained growth.

2024 is a year in which we saw the utility of creator content skyrocket and content produced by creators used across virtually every digital channel. With performance indicators showing higher engagement when compared to traditional brand advertisements, it explains why influencer budgets are increasing and the rise of using Creator Generated Content in paid media.

Studies like this State of Influencer Marketing Report are important for the industry to have quantitative data and peer input, which is why Linqia is dedicated to continued research that pushes the influencer industry forward. Between the number of social platforms, volume of and tiers of influencers, metrics for measuring success, and number of providers offering influencer services, it can feel like a sea of chaos for many marketers. Linqia is the calm in that chaos, and we remain dedicated to making the complex feel simple for our many brand and agency partners.



ABOUT LINQIA

Linqia is the calm in the chaotic sea of influencer marketing. As a full-service, tech-enabled platform, Linqia handles campaigns for the world's leading brands, from influencer selection to creative strategy to media amplification to measurement.

While some influencer companies offer only technology and others operate as creative agencies, Linqia leverages both science and storytelling to help brands create high performing content backed by quantitative results. Linqia has worked with some of the largest brands in the world, including McDonalds, Kraft, Nestle, Bayer, Clorox, and many more.

CALM IN THE CHAOS