



The Value of Influence

Are Influencers an effective use of your marketing budget?

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Influencer activity
reflects how commerce
is evolving.

Today's agenda

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Creativity in a
Digital-First World

02

Are Influencers
Effective?

03

Maximising
Influencer ROI

04

A Future-Proof
Strategy

01

Creativity in a Digital First World

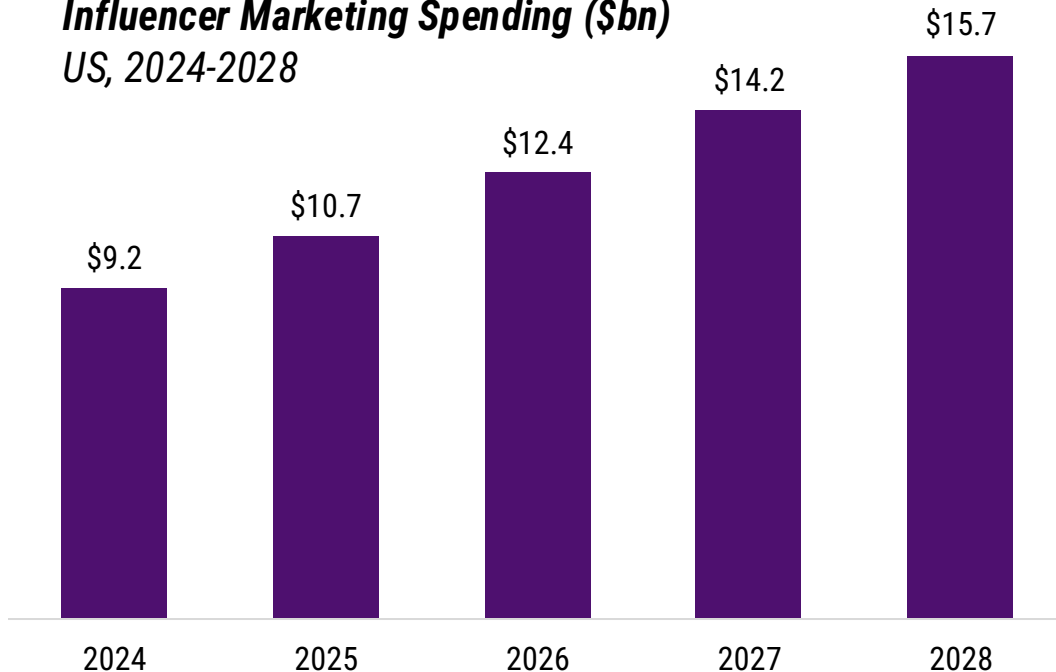
What does 'creative' look like in an
Influencer context?

The Age of Influence

Influencer investment is expanding fast, fed by evolving media consumption habits and democratization of technology.



Influencer Marketing Spending (\$bn)
US, 2024-2028



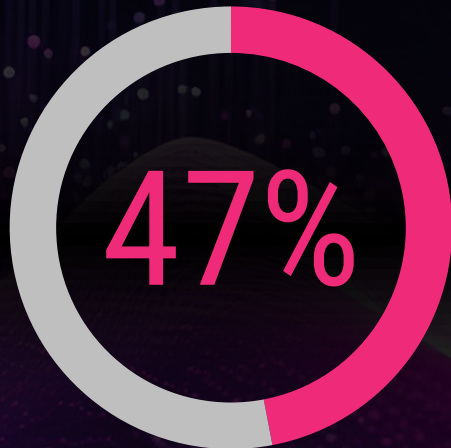
US influencer spend is predicted to reach

\$16B

by 2028.¹

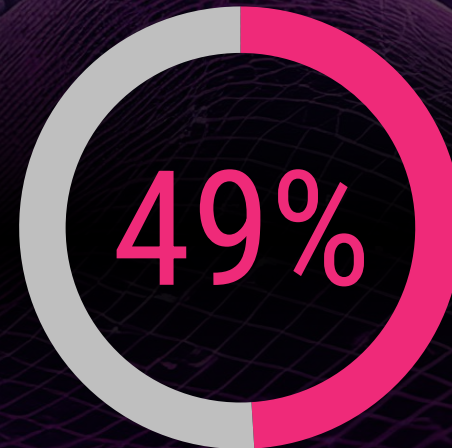
The Enduring Power of Creative

Creative remains the foundational driver of ad effectiveness, despite seismic shifts in the media landscape.



2016

...of incremental sales due to advertising driven by creative elements



2023

...of incremental sales due to advertising driven by creative elements

In a changing media landscape, creative remains foundationally important. The evolution is in creative ownership between brands & creators.

Creative principles still apply...

Underlying principles of digital creative excellence are consistent with more traditional channels - brands still need to be part of the story, differentiating through original ideas and compelling storytelling.



+10-29%

Product presence in the first 2 seconds.



+12-18%

Brand Name or Logo mentioned.



+4-17%

Human presence in the first 2 seconds.

...but audience expectation has shifted

Evolving media consumption & buying habits are transforming the nature of consumer engagement.

WHAT

Social platforms with retail media component (e.g. FB Marketplace, TikTok Shop).

Collaborative models such as branded content studios & influencer-led creative campaigns.

HOW

Authentic experience driven by non-corporate brand content.

Remember – the audience is following the influencer, not the brand.



Gen Z audiences are

+124%

more likely to donate to a cause due to an influencer.¹

Creator economy reshaping how consumers buy

- The center of purchase influence is shifting fast. TikTok Shop, while still a small slice of total retail, is scaling quickly—and redefining how consumers discover new products, innovation, and desire.
- By next year, half (50.1%) of social network users are expected to also be social buyers.² As brands deploy more of their marketing resources to fuel creator marketing, a new class of “influencers” is shaping a rapidly expanding commerce network, giving consumers fresh ways to explore and buy.
- For brands, this demands real-time awareness and unprecedented agility – social trends now move too quickly for slow planning cycles. Although adding complexity, it also unlocks a powerful opportunity: a dynamic, innovation-first growth engine for retailers ready to move with their customers.



TikTok Shop generated
\$6.5B
in the US in Q4,
reaching **1% of total retail sales** in just
2 years.¹

¹ Source: Circana, Complete Consumer, 11 weeks ending December 21, 2025 (Total retail, brick & mortar, e-commerce; excluding foodservice and tobacco), and Circana, SocialCommerce, 13 weeks ending January 4, 2026 (TikTok Shop)

² Source: EMARKETER US Social Commerce Forecast 2026



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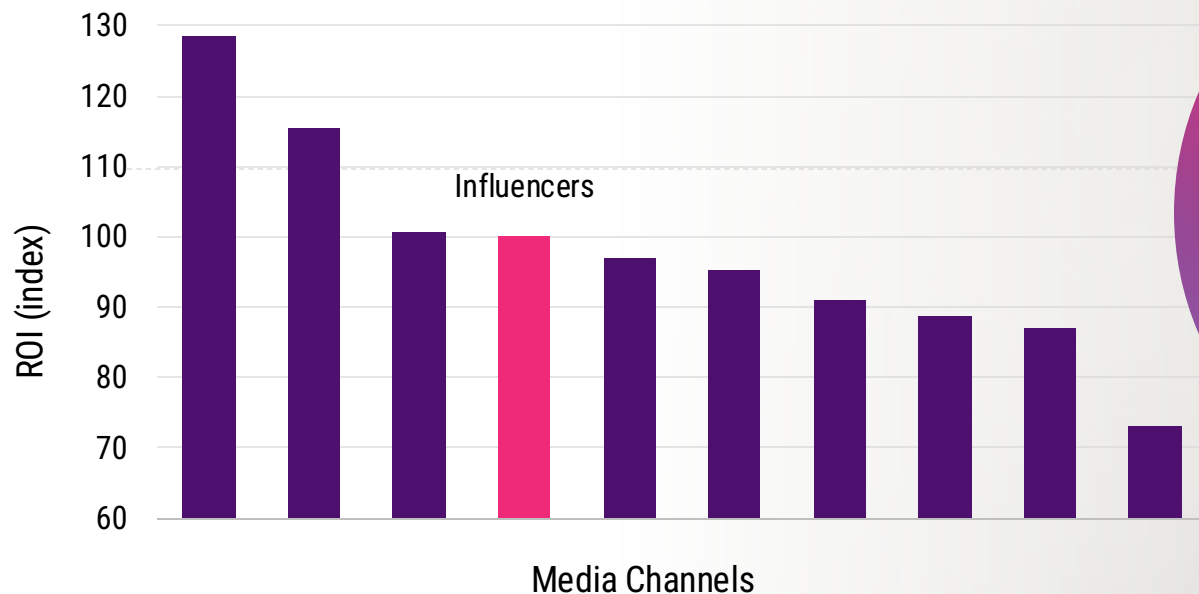
Are Influencers Effective?

How much ROI do Influencers deliver
relative to other media channels?

Influencers punch above their weight

Influencer activity delivers equivalent short-term payback to the average media channel.

ROI by Media Channel
Circana MMM Normative Benchmarks | All Sectors



Influencers deliver competitive short-term brand ROI in relation to other media channels, in addition to authentic consumer engagement.

Small but mighty

Influencer returns are more powerful for smaller brands.

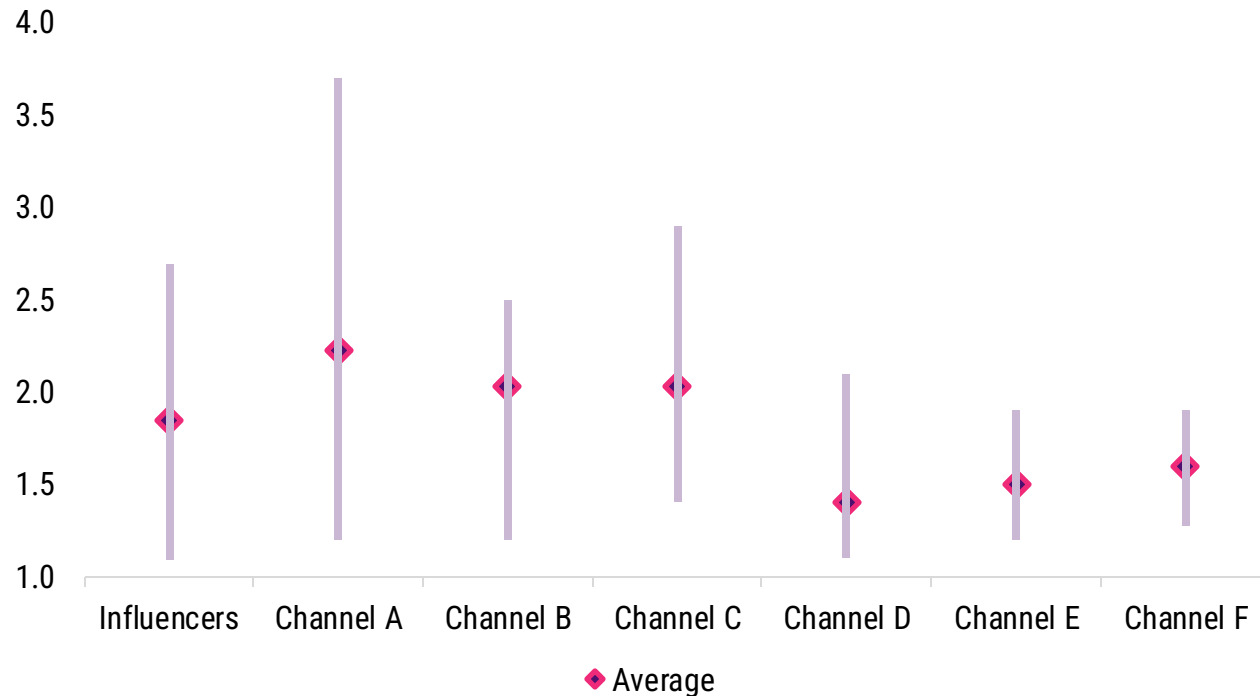
Influencer ROI index (100 = channel average)



Here for the long term

Influencers can drive comparable long-term impact to more established media channels, especially where their role is to educate or build awareness with new audiences.

Long-Term ROI Multipliers by Media Channel
Circana MMM Normative Benchmarks





03

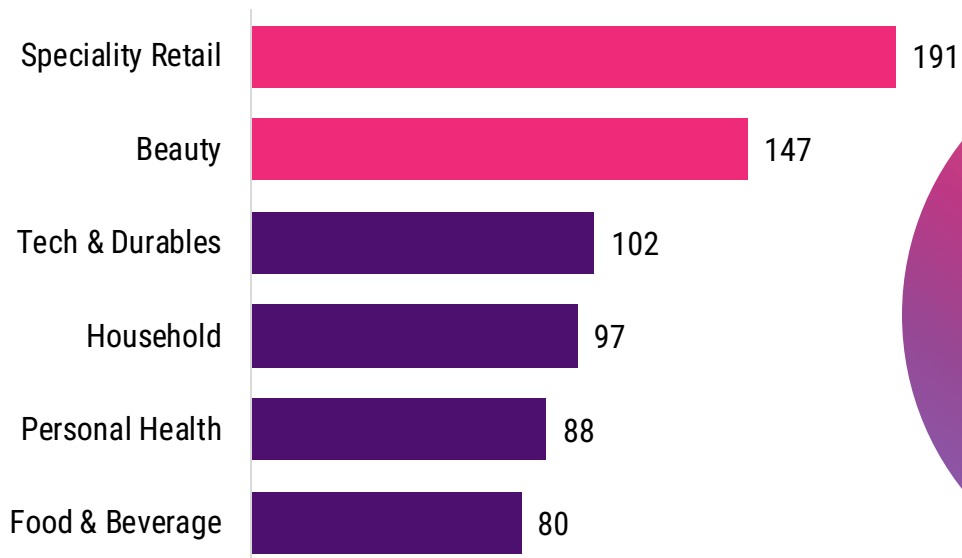
Maximising Influencer ROI

Which strategies & tactics are emerging as more efficient for brands?

There are clear sector frontrunners

Influencers punch above their weight in ROI delivery for Beauty & Speciality Retail products.

Influencer ROI index by Super Category¹



Gen Z audiences are

+92%

more likely to purchase a product due to influencer impact...²

...and

+91%

more likely to get most of their **beauty** inspiration online.²

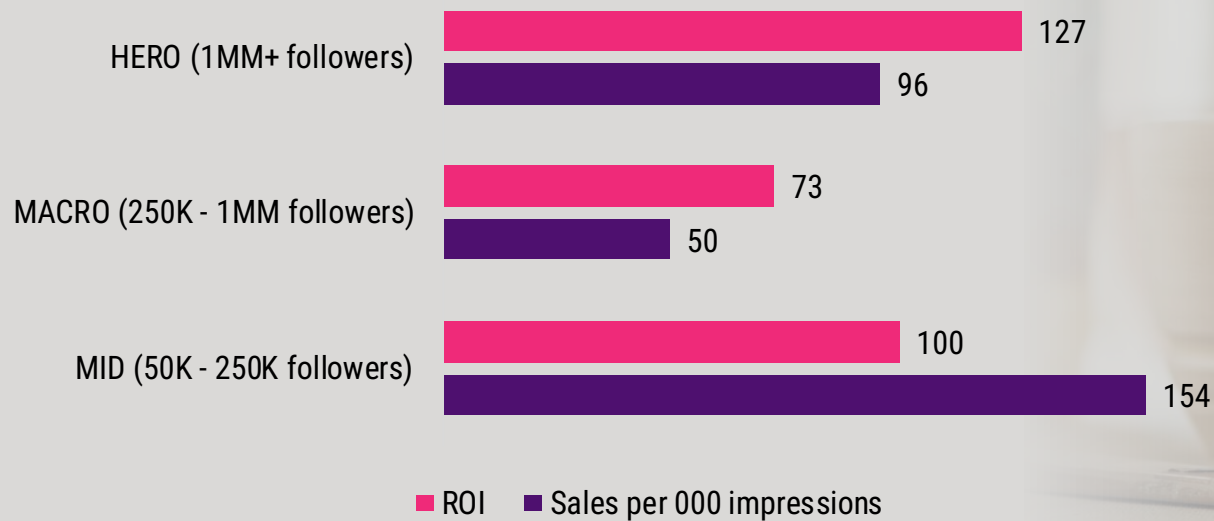
Size isn't everything

Partnering with the right influencer is not just a question of maximizing reach.



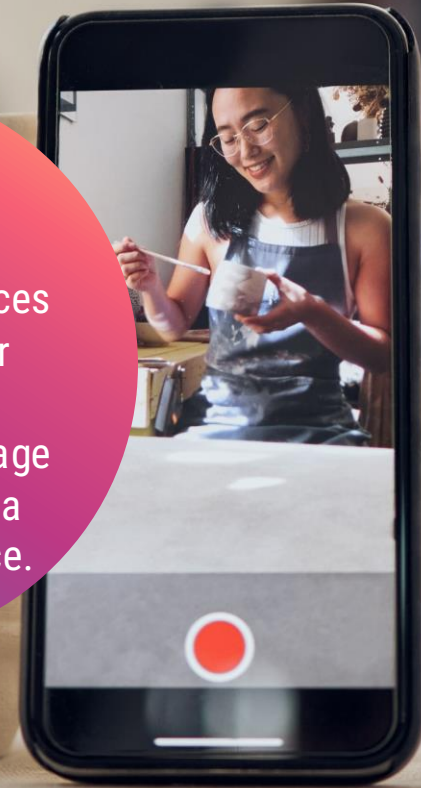
Cost & response is impacted not just by creative strategy but also by the influencer's audience. In this example, the most effective response is seen at the mid-tier level.

All Influencers are not (self-)created equal



WHY?

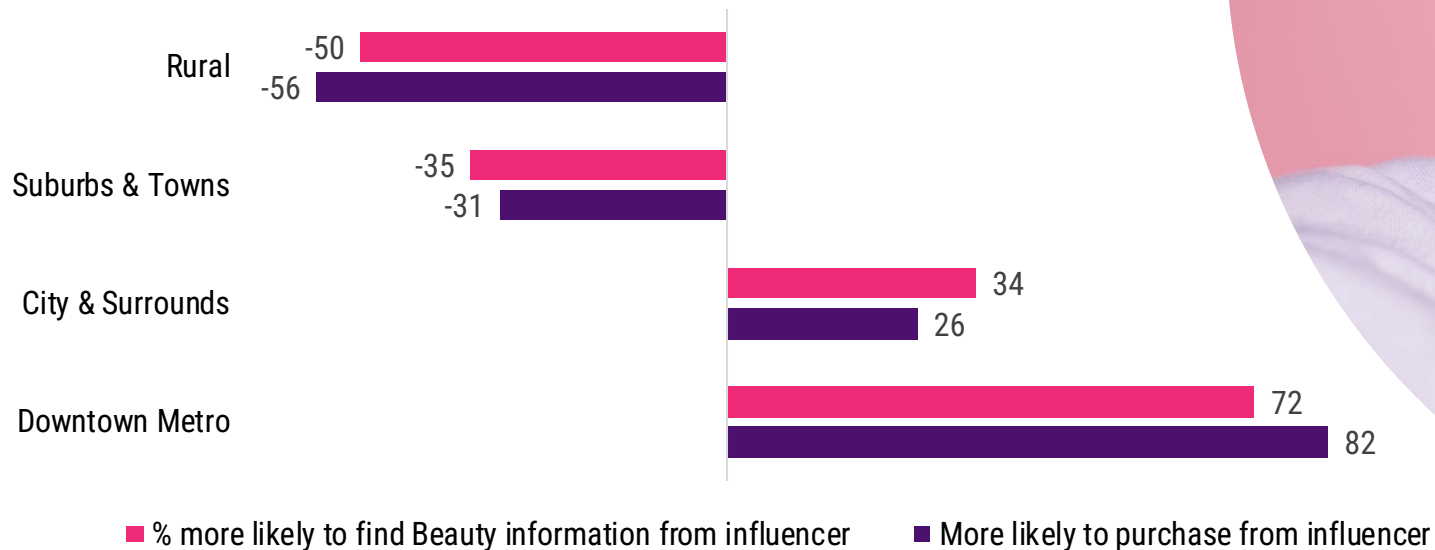
While bigger audiences may deliver higher reach, smaller influencers can engage more directly with a committed audience.



Social Commerce is Generational & Urban

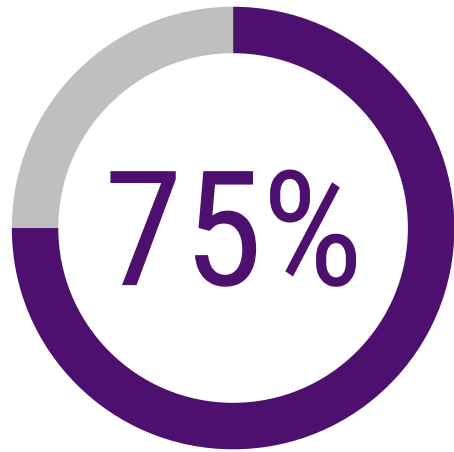
Urban cores are the epicenter of influencer commerce.

Influencer activation resonates most in dense metro areas, with Beauty and social platforms also skewing heavily urban.



Headroom to test & invest

For most brands, there is headroom and flexibility to increase Influencer activity.



% of brands whose total Influencer spend is not yet saturated



Source: Circana Compass ROI norms

Circana, LLC | Proprietary and confidential



04

A Future- Proof Strategy

Best practice to ensure Influencer
investment is working for your brand

Influence is only the beginning

- ✓ Influencer insights show **where demand is building**
- ✓ Retail media helps brands **act on that demand and measure impact**
- ✓ Growth depends on validating **the right** in-store response

Make It Measurable!

Data, tools & process are all critical enablers of a quantified measurement framework.



Clarify who is managing the influencer channel data on your behalf.



Agree upfront which metrics will be shared, and at what level of granularity.



Align in advance on success metrics and a robust measurement plan, including creative impact & long-term equity effect within the full marketing mix.

Not integrating the importance of creative in planning & optimization can affect

38%

of ROI for digital investments.¹



3 key steps to unlocking the value of influence

Demonstrating measurable business value is critical to future-proof your Influencer strategy.



Be ready to articulate business impact

Your CFO needs to know what this growing line in the budget delivers in the short & longer term, relative to performance media and other above-the-line channels, and when to expect payback or equity improvement.



Prioritise creator authenticity

The voice of the creator is important to retain - it is their audience, not yours. Gen Z & Millennial audiences are highly receptive to messages shared by trusted creators.



Move fast to discover what works for you

Brand/influencer size, audience profile & preferences, sector, creative style – your brand story is not the same as anyone else's. The fastest route to growth is to test & learn – so make it measurable!

Questions & Answers

Thank you

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