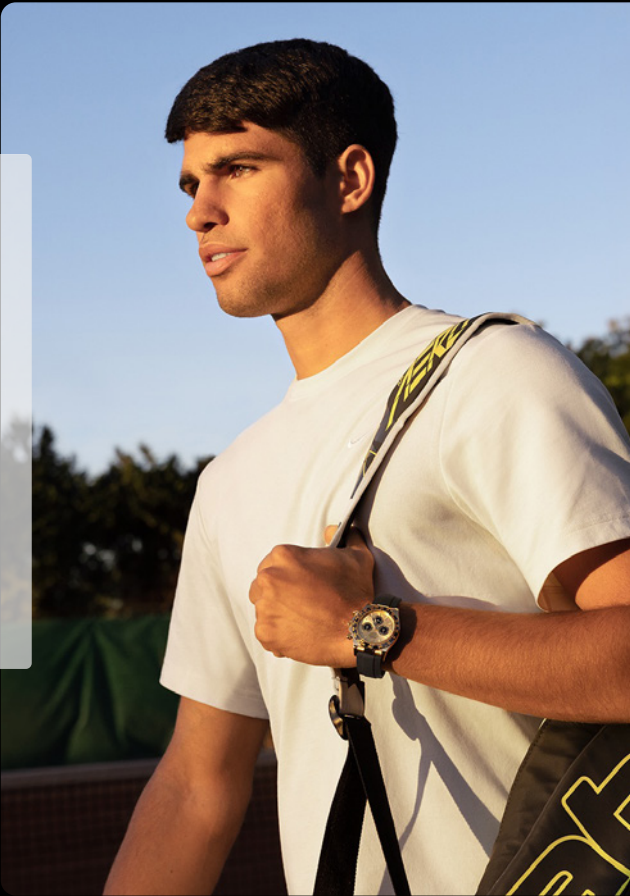
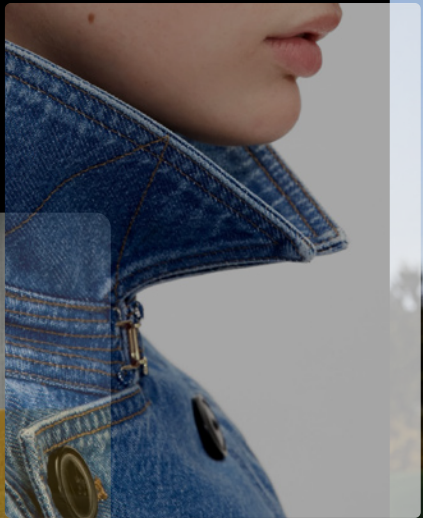
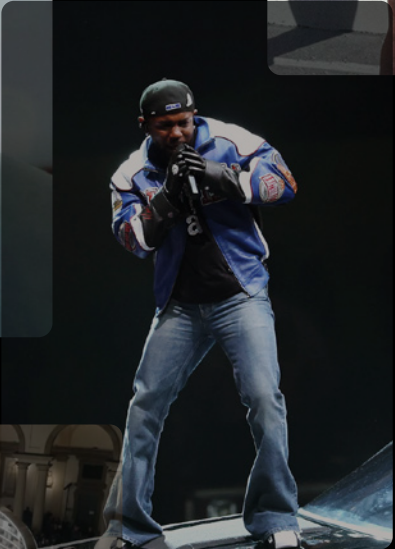


A Year in Data 2025





NikeSKIMS. Courtesy of the brand.

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Methodology

This report provides a comparative analysis of brand performance across major social platforms, including Instagram, TikTok, Weibo, X, and Red. The study covers the period from January 1 to December 1 for both 2024 and 2025 to identify year-over-year trends and industry shifts. The findings are synthesised from a comprehensive data set across social platforms, highlighting key performance benchmarks and emerging digital trends.

Scope & Verticals

The analysis focuses on the following primary industry verticals:

- Beauty
- Fashion
- Media & Entertainment
- Fitness
- Food & Beverage
- Watches & Jewellery

Metric Definition: Earned Media Value (EMV)

Lefty utilises Earned Media Value (EMV) as a primary KPI to quantify the impact of social media presence. EMV represents the estimated cost of achieving equivalent reach through paid advertising.

Lefty calculates EMV by applying an industry-standardised Cost Per Mille (CPM) to the total organic impressions generated.

Calculation:

EMV = Impressions*CPM /1000

About Lefty

Created in 2015, Lefty is a platform that helps brands optimise their influencer marketing programs. Based on proprietary, state-of-the-art technology, Lefty supports brands with influencer identification, management and reporting of their influencer marketing campaigns.

Discover more at lefty.io or contact insights@lefty.io.

About Karla Otto

Founded in 1982, Karla Otto is a full-service brand-building agency, operating from thirteen cities across the globe. Karla Otto's service is unparalleled. Blending the best of fashion, beauty, design, lifestyle, and arts & culture, we offer a panoramic view of opportunities and the ability to execute complex ideas. Our loyal network and unrivalled approach to culture and community enables us to take brands to new territories.

Discover more at karlaotto.com or contact insights@karlaotto.com.

Meet the Team

Lefty

Laura Rocha, Head of Insights
Chuhan Liu, Junior Business Analyst
Lea Mao, Head of Marketing
Miguel Martinez, Brand Designer
Lada Gronskaia, Social Media Manager

Karla Otto

Anna Ross, Global Head of Insights
Nerys d'Esclercs, Insights Editor
Rui Huang, Data Consultant, Insights
Estella Calvert, Insights Assistant



New York street style during AW26 Fashion Week (Spotlight).



2025: A Parasocial Year

How intimacy, access and social media
reshaped people’s relationship with talent
and brands.

As the Cambridge Dictionary named ‘Parasocial’ its Word of the Year, the term found clear expression across the brand and marketing landscape. 2025 became the year celebrities and brands felt closer than ever, opening more of their worlds to online audiences globally. Timothée Chalamet appeared at his own lookalike contest; the cast of Severance brought the TV series to life in New York and London; KATSEYE, an American group tapping into K-Pop lore, began to redefine how fandoms are built and sustained; while brands like Dior invested in global brand ambassadors to drive the message of Jonathan Anderson’s arrival.



This shift points to a broader democratisation of what was once out of reach. TikTok – one of 2025’s fastest-growing social platform – has pulled back the curtain, offering unprecedented access to talent, culture and brands. Those that embraced TikTok-first strategies saw the strongest growth in media impact. Meanwhile, social-first personalities such as Lyas introduced a new community-first format across Fashion Weeks, the Watch Party, where the public was invited to join in IRL, with brands racing to get involved.

In this report, Lefty and Karla Otto join forces to decode the data and cultural signals behind the year’s most influential moments, translating them into strategic imperatives for the year ahead.

Talent Insights



Kyoka for G-Shock (Instagram).

KATSEYE, Talent of the Year



The newly Grammy-nominated girl band doubled its follower count over 2025.

Girlband KATSEYE, formed through a reality competition series, became one of the first America-based groups to follow the K-Pop formula with catchy lyrics and synchronised, easy-to-replicate choreography. Born from the public vote, each member has a standout relationship with their fans, whom they can engage with directly through their management companies’ official platform, Weverse, fuelling the band’s continued growth and appeal.

Moreover, KATSEYE counts Humberto Leon as its creative director, cementing strong ties to the fashion world. After partnering with **Coach** and **Fendi**, they featured in **Gap’s** viral ‘Better in Denim’ campaign, [with one video counting over 150M views on TikTok](#). With a new Grammy nomination and a confirmed slot at Coachella 2026, the band’s influence is expected to grow, making them a standout partner for luxury brands looking to align with new pop culture icons.

Identify your brand’s top talents.

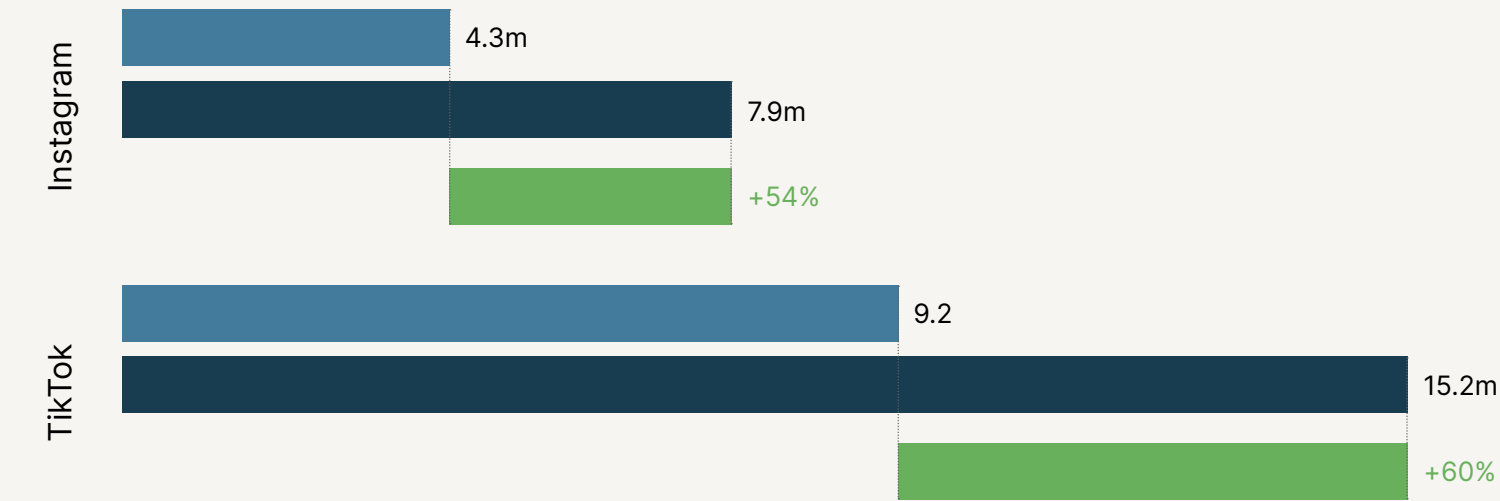
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KATSEYE promotional images for the EP *Beautiful Chaos* (Instagram).

KATSEYE’S Follower Growth over 6 months.

Jul 2025 Dec 2025





Lingling at the Dior SS26 Women's Show (Instagram).

Fandoms Shape the Fashion Week Conversation

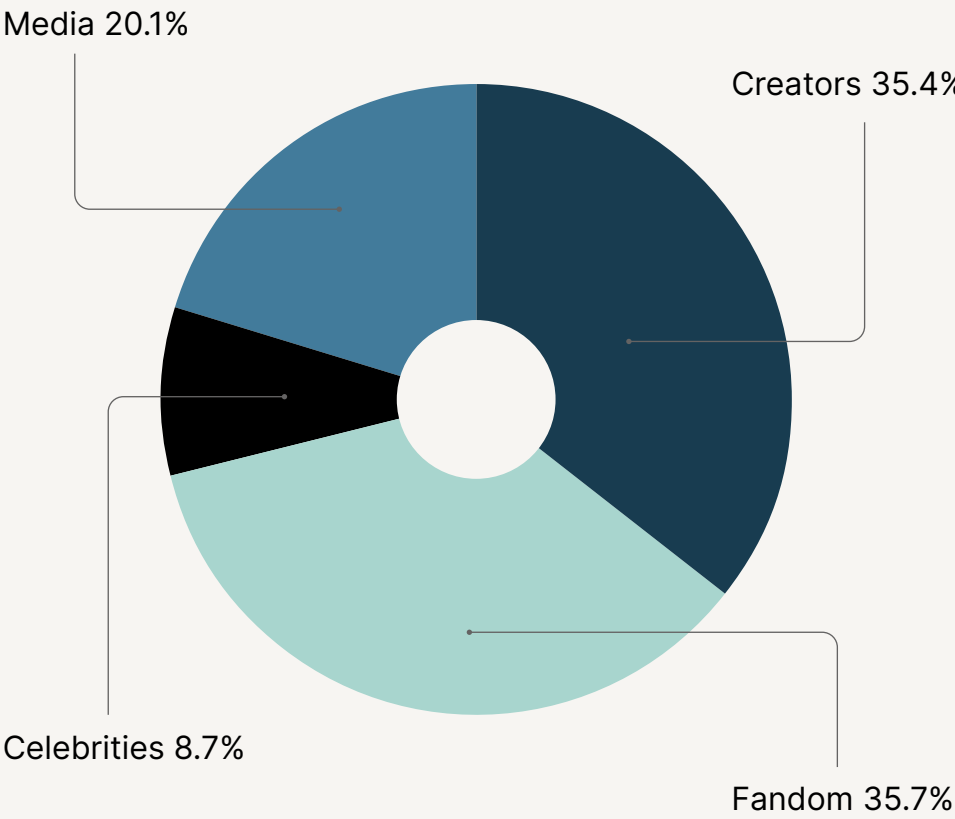
Fandoms were the #1 EMV driver for brands in 2025.

Overtaking influencers, fandoms have become the most significant driver of engagement and visibility across platforms, especially throughout fashion month. APAC talent continue to drive the most noise; however, the most recent SS26 fashion season marked a notable shift. Thai drama actresses Orm and Lingling claimed the top positions across fashion month, the first time K-Pop stars have been outranked since we began tracking FROW attendance in 2022.

Fandom is a lucrative ecosystem for both talent and fans: while celebrities rely on fan engagement to boost their visibility at events and attract brand deals, it is reported that about 10% of Gen Z now earn income from fan activities online (Music Radar, 2024). Fandom content has become so powerful that some entertainment companies are taking ownership of fan content, as seen with KATSEYE's official fan account, the 'Eyecons'. For brands, this could open new avenues to align with the very audiences that amplify visibility each season.

449m Total impressions driven by Orm and Ling on Instagram at SS26 Fashion Week.

SS26 Fashion Week Impressions Share by Categories on X.



Fastest-Growing Profiles

Across platforms, the talents showcasing standout follower growth boast unique skills paired with personality and a tone of voice true to their platform of choice.



@kyoka_rb.official

Japanese hip-hop dancer Kyoka Yamamoto has become a sensation in South Korea, attracting brand deals with **Timberland** and **BIOHEAL BOH**.

+80% Follower growth on Instagram over 6 months.



@audreynuna

Audrey Nuna took off after voicing the character ‘Mira’ in K-Pop Demon Hunters. Her TikTok account grew thanks to BTS moments from the movie promotion.

+87% Follower growth on TikTok over 6 months.



@glambby_

A beauty influencer gaining traction across platforms for makeup tutorials and GRWMs, alongside matcha recipes.

+60% Follower growth on YouTube over 6 months.



@艾敬AIJING

An artist and singer-songwriter, Ai Jing’s follower count on Weibo grew considerably following a collaboration with **Dior** at the Fosun Foundation in Shanghai.

+76% Follower growth on Weibo over 6 months.

Discover more growing profiles for 2026.

→ Reach out to us today

Top 5 Talent Trends

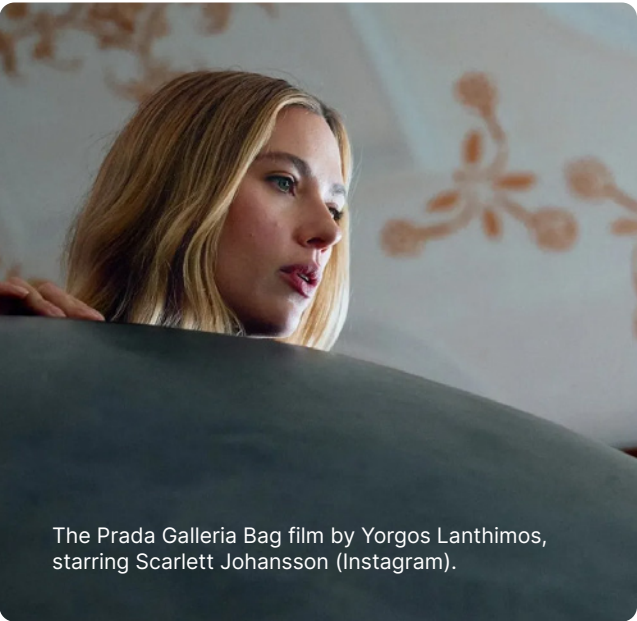
As audiences increasingly become disillusioned by traditional forms of influence, they’re seeking individualist profiles with unique points of view, standout talent and personality.

Get bespoke talent analysis and strategy.

→ Contact us today

Film Industry Professionals

As more industries such as Fashion and Jewellery court the world of film, they’re enlisting film directors, producers and music composers to walk their show and direct their campaigns.



The Prada Galleria Bag film by Yorgos Lanthimos, starring Scarlett Johansson (Instagram).

The Multi-Hyphenates

Influencers are vying for traditional fame as audiences want to follow people with genuine talent. Think: TikTok’s Addison Rae becoming a Grammy-nominated musician or Benito Skinner taking his YouTube comedy to Amazon Prime with ‘Overcompensating’.



Addison Rae (Instagram).

The Curators

In a world saturated by content, the ability to spot what’s special has become increasingly influential. From stylists and art directors to substackers and moodboard accounts, a new era of style curators offers audiences a unique lens on culture.



“Minimal” exhibition at the Bourse de Commerce, Paris (Instagram).

The Personality Hire

Humour, unique tone of voice and meme-able mannerisms (such as Timothée Chalamet’s ‘schwap’ in the Marty Supreme video promo) are traits to look out for in your next talent partnership.



Timothée Chalamet in Marty Supreme (Instagram).



Lyas (Luigi and Iango).

Commentators Become Critics

From Lyas to Hanan Besovic, the social commentators – who we first called out in SS23 – are now stepping into the role of trusted critics recognised by the industry.

Social Media

Paris street style during SS26 Fashion Week (Spotlight).

2025 on Social: Chinese Networks and TikTok Grow

As the influencer marketing landscape continues to evolve, talent activations increased across all major social platforms.

While Instagram remained the leading platform, taking 73.5% Share of Voice (SoV), TikTok demonstrated a significant surge in number of profiles activated, growing over 50% YoY.

Meanwhile, amid China’s spending slowdown, brands leaned on talent to reignite consumer interest, with influencer initiatives increasing across Weibo and Red.

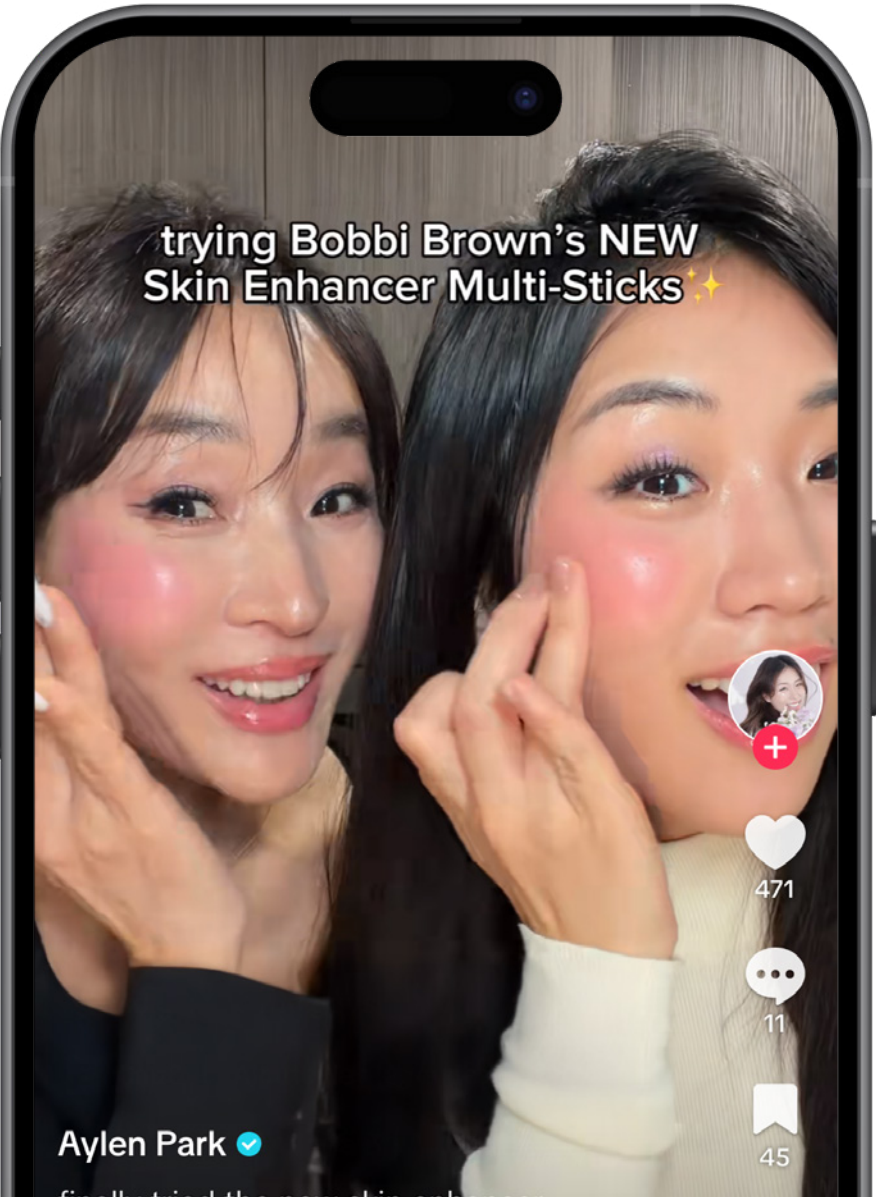
+50%

Influencers on TikTok.

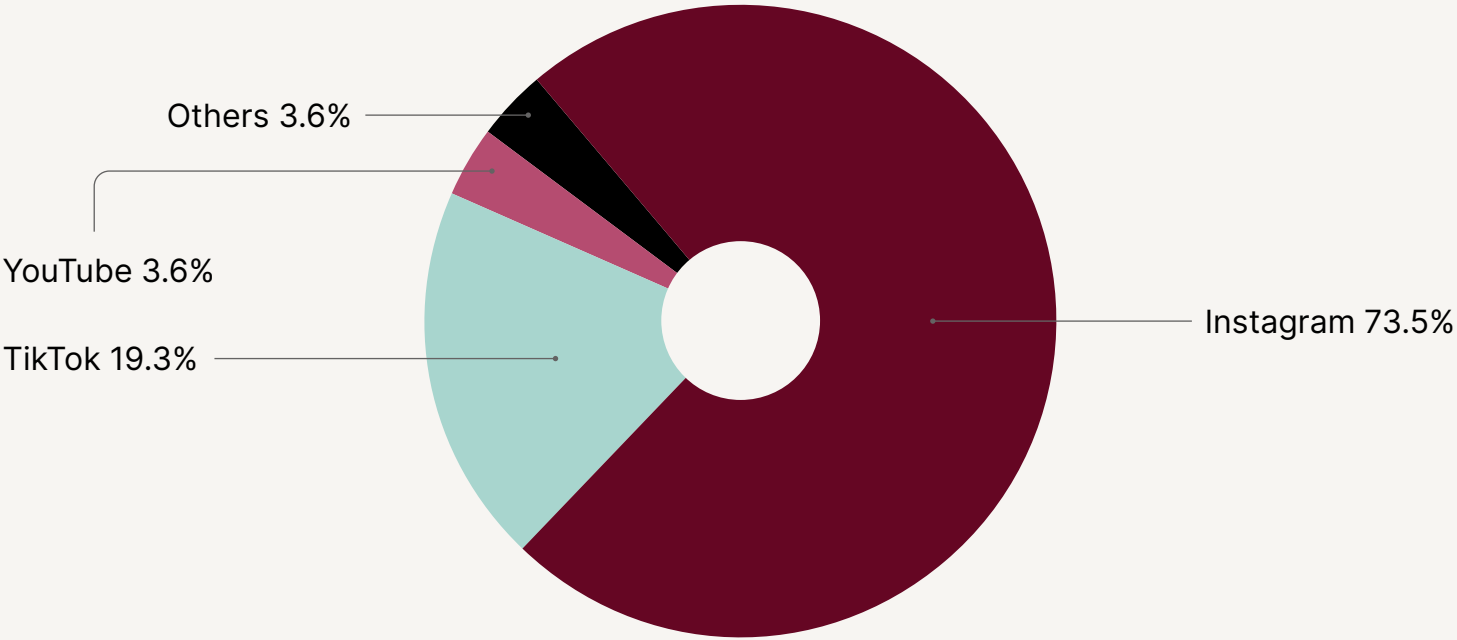
Interested to learn more about our influencer services?

→ Reach out to us today

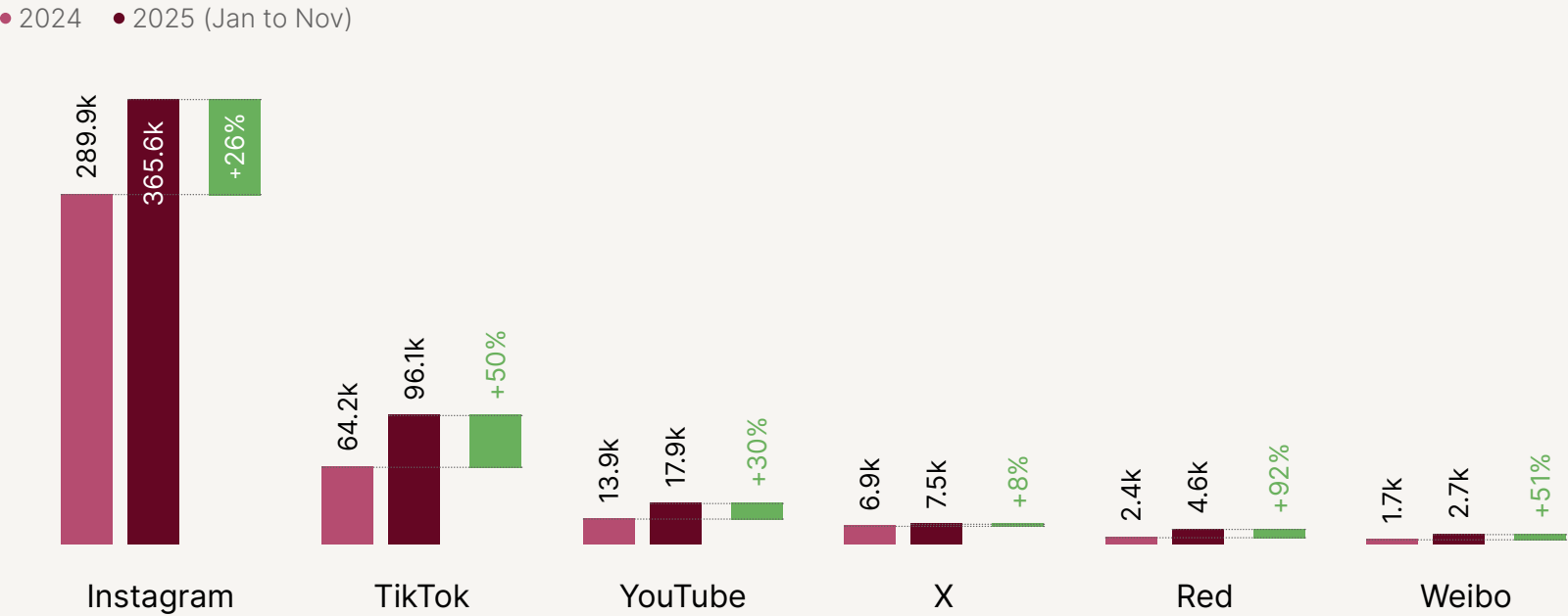
The real opportunity lies in nuance. As audiences increasingly seek inspiration from more niche creators and aspirational profiles, influencer strategies tailored to specific platforms and audiences will be essential for navigating the expanding landscape into 2026.



Share of Voice by Tracked Influencer.



Platform Growth by Number of Influencers Activated.



Category Breakdown



Jannik Sinner at Wimbledon (X).



Jo Malone Raspberry Ripple Cologne (Instagram).

TikTok is Fragrance’s New Playing Field

The fragrance industry boasts near equal visibility on Instagram and TikTok

As per The Business of Fashion and McKinsey’s latest ‘The State of Fashion’ report, fragrance is projected to lead the beauty sector into 2026, in part thanks to the rising popularity of ‘high-end niche’ product offerings.

With more than 26 billion views on the hahstag, #PerfumeTok has propelled the category forward, introducing more Gen Z consumers than ever to new and niche scents. According to Lefty data, fragrance brands gained greater traction on TikTok, expanding their SoV on the platform by 4% YoY. Thanks to this growth, fragrance became the only category studied that showed near equal EMV across Instagram and TikTok.

While overall EMV has decreased in 2025, brands can recapture attention by leaning into their niche status and investing in TikTok-first strategies.

Get custom benchmarks on your industry of choice.

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Top 3 Fragrance Brands



Fragrance Market Evolution by EMV, 2024-2025



Fragrance Market Network Distribution



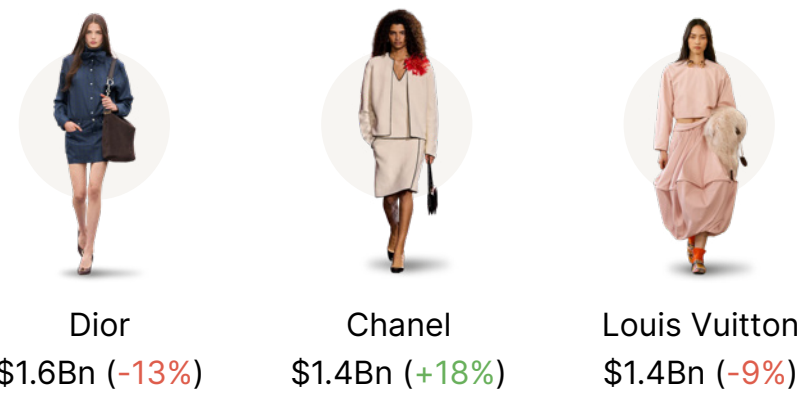
How Fashion’s Reset Played on Social

Audiences in 2025 craved newness and began seeking inspiration beyond fashion, which decreased the industry’s overall online visibility

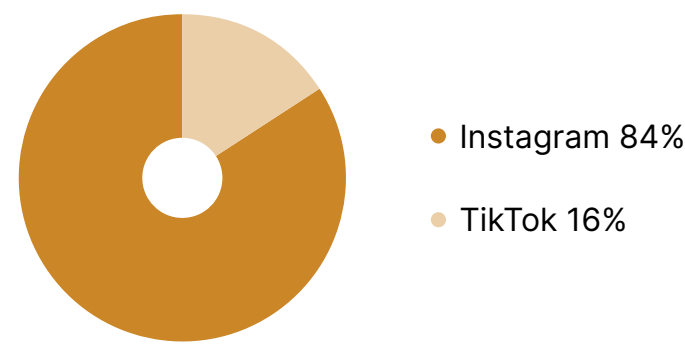
In tandem with a wider luxury slowdown, the fashion category’s visibility online decreased -8% YoY. Many luxury groups tried to recapture attention with a new creative guard, who dazzled audiences with entertainment-first shows, out-of-the-box talent partnerships and cinematic campaigns. **Chanel**, under the new creative direction of Matthieu Blazy, was one of the few that saw its visibility increase in 2025. His debut show in October was widely acclaimed, boosted by global stars in attendance such as Thai actress Becky Armstrong, as well as a social-first runway scenography.

Meanwhile, brands should take note of TikTok’s growing importance, which contributed 13% more visibility to the category. While Instagram has historically been the dominant platform for fashion conversations, a significant shift is happening, spurred by a new generation of creators whose humor, speed, and rawness are redefining the landscape.

Top 3 Fashion Brands



Fashion Market EMV by Network



Discover 2025’s top fashion brands.

→ Download our SS26 Fashion Week Report



Fashion’s Top Moments

2025 was bursting at the seams with designer debuts, new acquisitions and disruptors gaining traction.

Dior, under the new design direction of Jonathan Anderson, refined its global talent roster to perfection, while Gucci took a page from the cinema playbook to launch Demna’s new vision.

Getting clever with casting paid off for Doublet, this year’s fastest growing brand, who tapped Raul from J-Pop group Snow Man to walk its show, to the delight of his avid fanbase.

Get bespoke talent analysis and strategy.

→ Contact us today

Key Designer Debut: Chanel

\$42.8m EMV Generated at Womenswear SS26.



Most Impactful Brand: Dior

\$98.1m EMV generated by Dior Menswear SS26.



Fastest Growing Menswear Brand: Doublet

+1,338% YoY EMV Growth at SS26 Menswear.



Fastest Growing Womenswear Brand: Sergio Hudson

+813% SoS EMV Growth at SS26 Womenswear.



Standout Entertainment Strategy: Gucci

\$31.7m EMV Generated at Womenswear SS26.



Fastest Growing Brand on TikTok: Gap

+87.6% Follower growth over 180 days.

On Cultural Time: Fine Watches & Jewellery

Leading watches and jewellery brands are embedding themselves in culture to command attention over time.

While overall demand for luxury goods has softened, fine jewellery and watches continue to see steady market growth as consumers seek investment pieces. But online, despite a larger number of influencers producing 30% more posts, there was a 22% drop in average EMV per post, meaning content resonated less.

Learning from leaders in the space, Rolex and Cartier each captured 16% of the total visibility through ongoing talent partnerships rooted in wider cultural moments: Rolex with sports ambassadorships, and Cartier through entertainment. Rather than simply showing up, these brands invested in the cultural ecosystems they sought to align with, leveraging patronage initiatives such as filmmaker awards and masterclasses.

The takeaway for luxury brands is clear: relevance is built less through momentary visibility and more through sustained cultural investment to establish long-term legitimacy.

Get custom benchmarks on your industry of choice.

→ Contact us today

Top 3 Watch & Jewellery Brands, 2025



Rolex
\$773m (+16%)



Cartier WJ
\$759m (+7%)

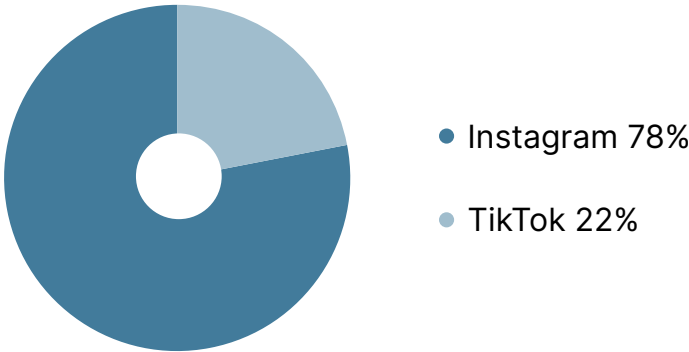


Tiffany & Co.
\$501m (-9%)

Watch & Jewellery Market Evolution by EMV



Fragrance Market Network Distribution, 2025



Carlos Alcaraz for Rolex (Instagram).

Cultural Moments of 2025

Rihanna and A\$AP Rocky on the Cannes Film Festival red carpet (Getty Images).

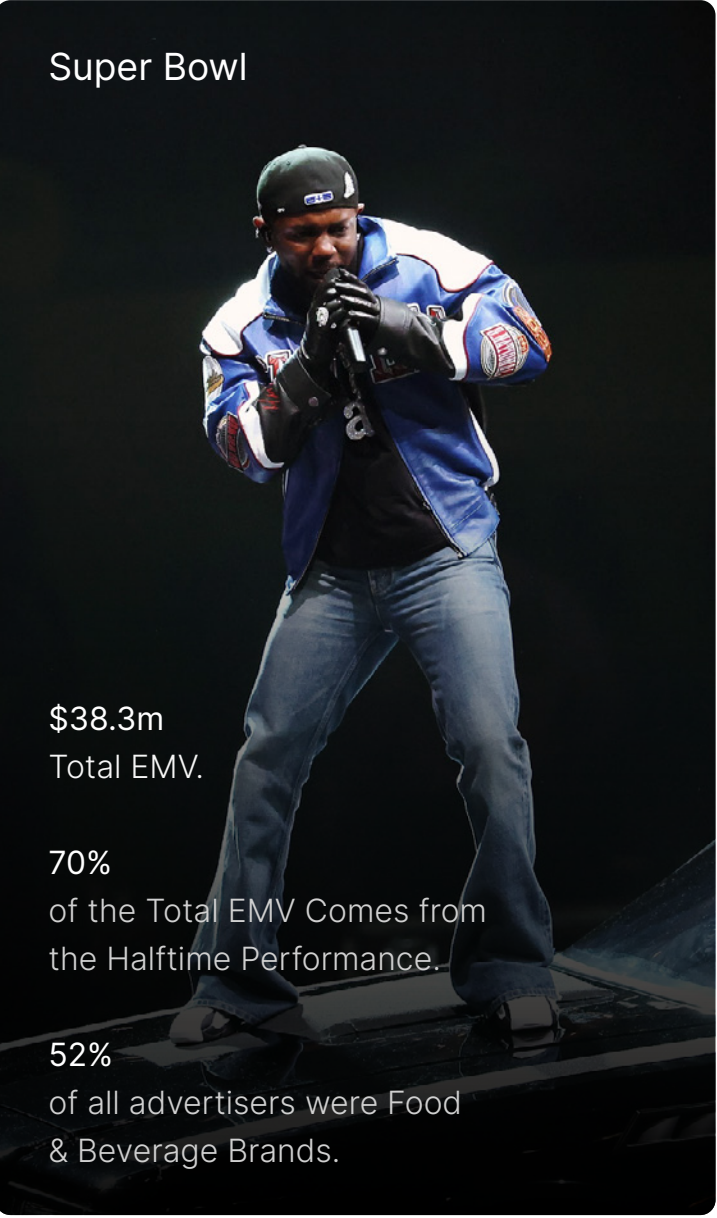
Leveraging the Cultural Calendar

How do leading brands create impact across major moments?

Receive insights key events through out the year.

→ [Subscribe to our newsletter](#)

Super Bowl



\$38.3m
Total EMV.

70%
of the Total EMV Comes from the Halftime Performance.

52%
of all advertisers were Food & Beverage Brands.

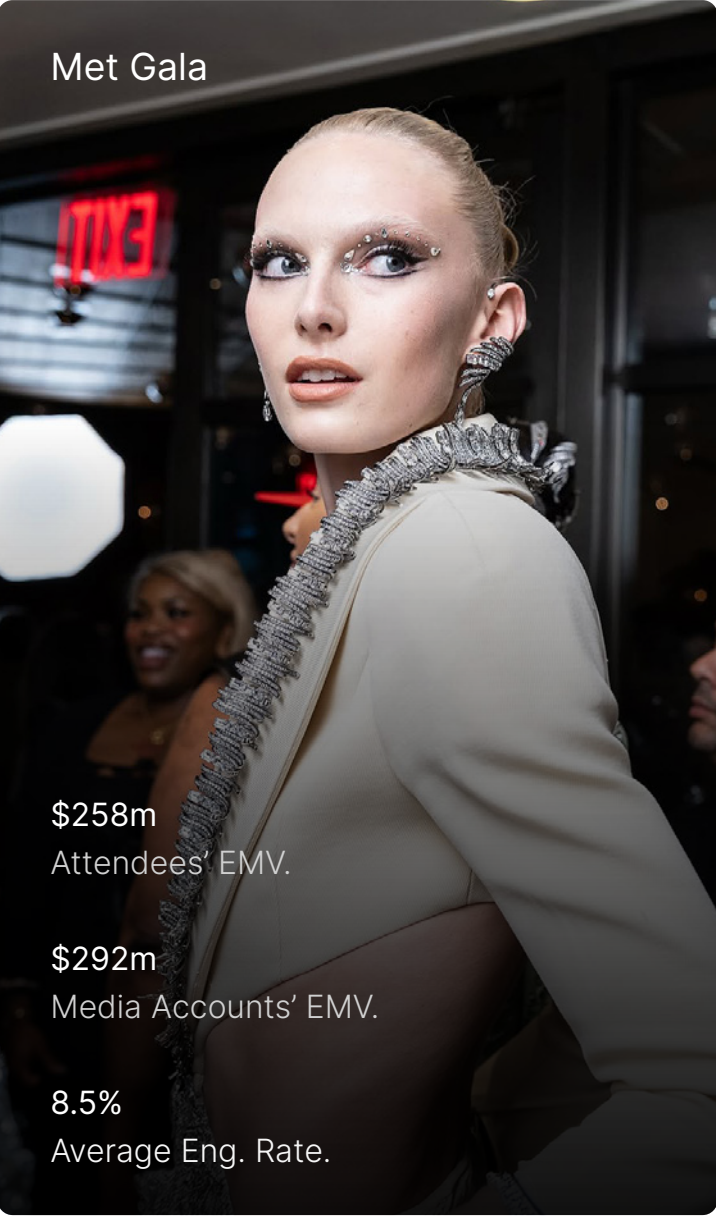
UEFA



\$31.7m
Total EMV of PSG's Players.

23%
Total ER.

Met Gala



\$258m
Attendees' EMV.

\$292m
Media Accounts' EMV.

8.5%
Average Eng. Rate.

Cannes Film Festival

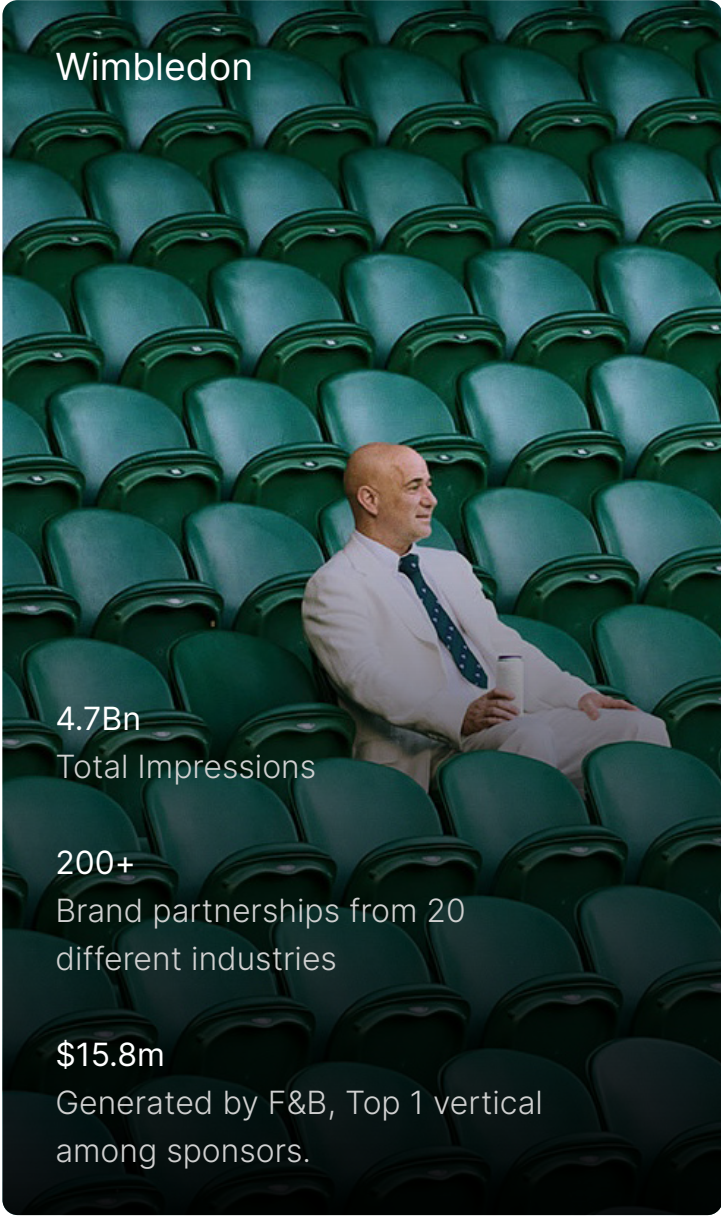


\$206m
Total EMV.

+72%
EMV Growth YoY.

+334%
EMV Growth YoY of L'Oréal Who Reinforced Their Cannes Presence in 2025.

Wimbledon



4.7Bn
Total Impressions

200+
Brand partnerships from 20 different industries

\$15.8m
Generated by F&B, Top 1 vertical among sponsors.

Our Services

Paris street style during SS26 Fashion Week (Spotlight).

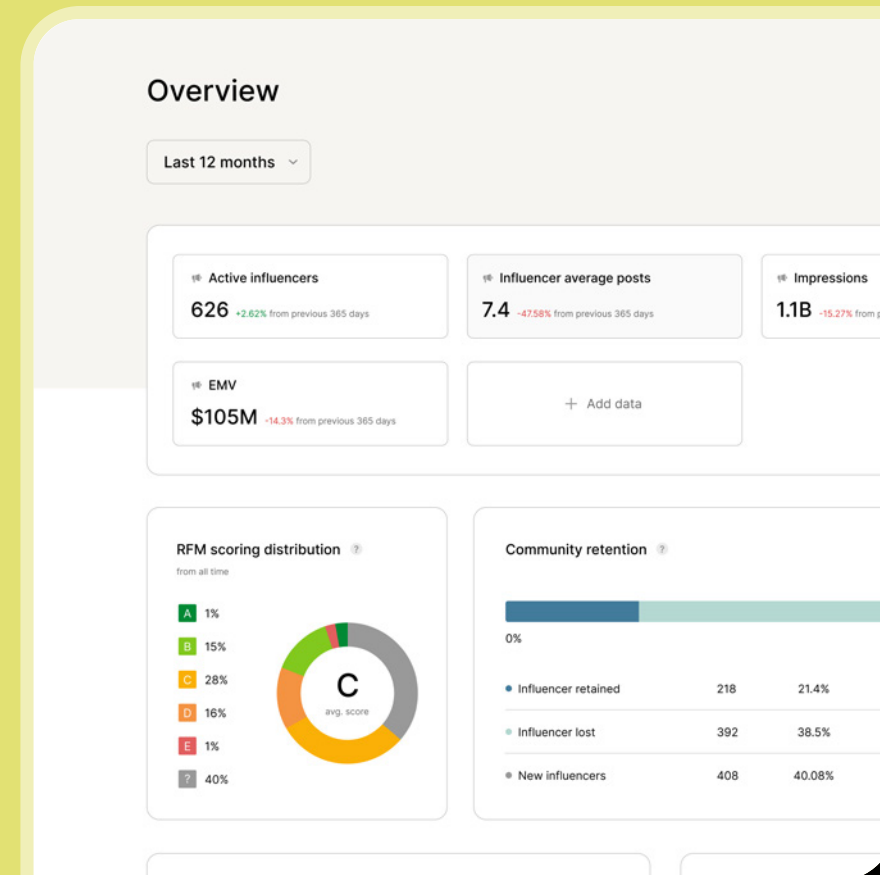
Fuel Brand Awareness and Drive Sales through Influencer Marketing with Lefty

lefty

Cover all your influencer marketing needs in one platform across global social networks

- Discovery & Recruitment
- Campaign Management
- Competitive Analysis
- Product Seeding
- Reporting & Analytics
- Influencer Payment
- Influencer Affiliation
- Influencer Casting

→ Discover more

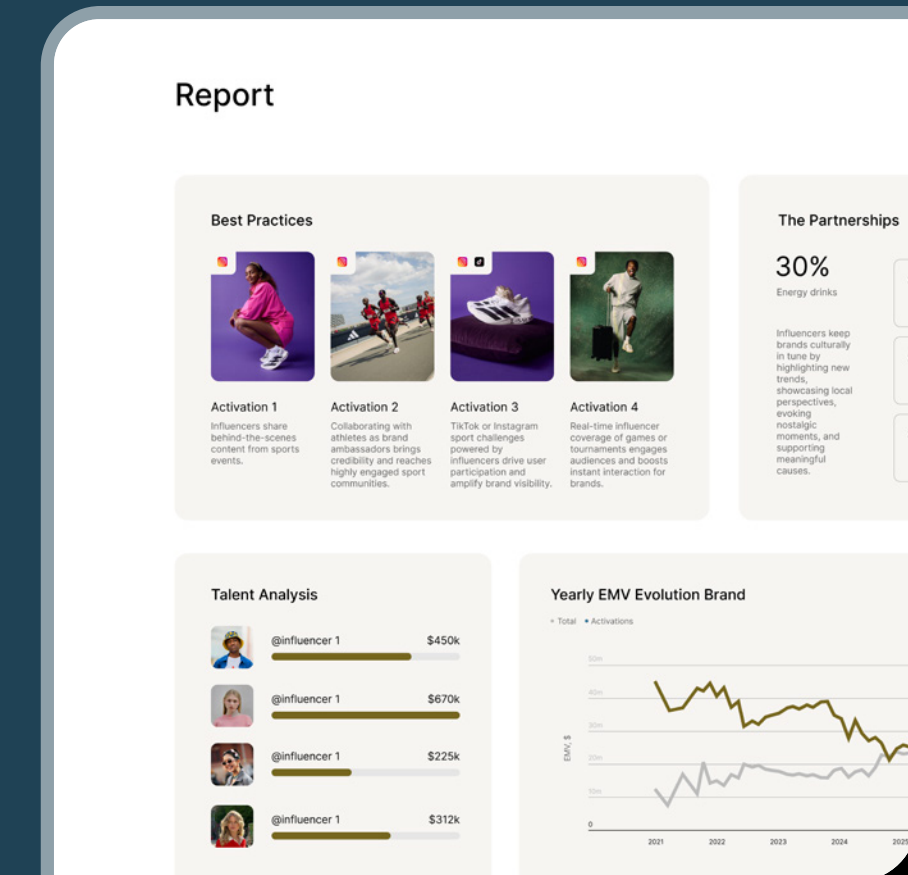


lefty insights

Transform data into strategic wins with Lefty's consulting services

- Activation Reports
- Strategic Analysis
- Community Assessment
- Industry Reports
- Influencer Casting

→ Discover more



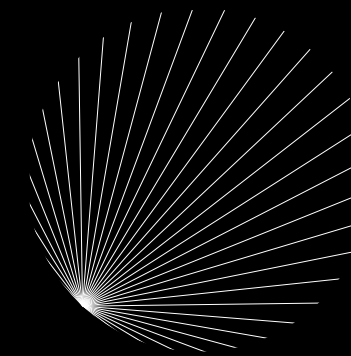
Uncover the Trends Shaping Communications with Insights by Karla Otto

PERFORMANCE ANALYSIS & BENCHMARKING: BESPOKE FOR YOU

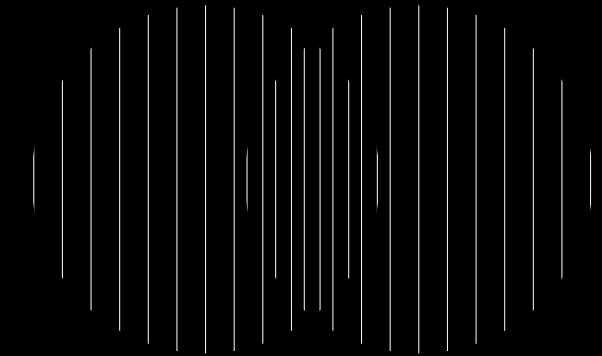
We offer a unique set of services specifically crafted for helping marketing and communications teams get closer to their desired audience and analyse their true brand impact.

The difference is in our creative translation, deep understanding of the luxury sector, and ability to execute alongside our partners and across The Independents.

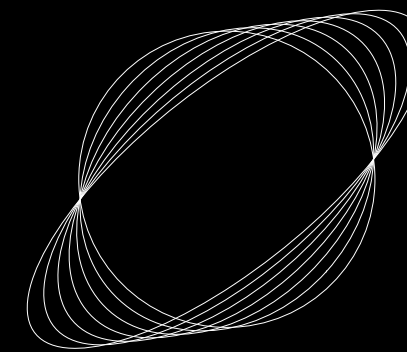
ROKSANDA SS26, VIA SPOTLIGHT



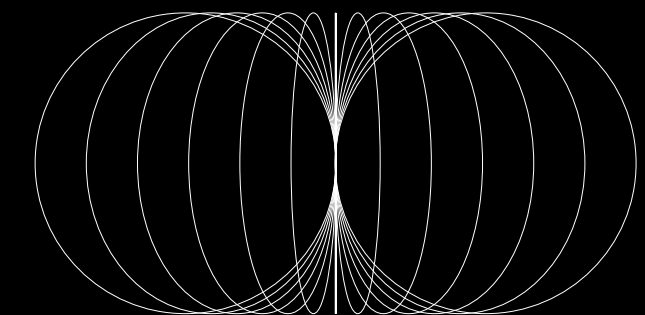
FUTURE ANALYSIS



AUDIENCE RESEARCH



PERFORMANCE ANALYSIS



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KARLA OTTO

THE INDEPENDENTS