KALO IQ
The US Influencer Marketing Platform

KALO IQ RESEARCH   Q1 2026

DTC Creator Spend Index

What 200+ DTC brands spent on US creators in Q1 2026.
Aggregated, anonymized data from 47,840 verified creator deals.

Total Q1 2026 spend tracked

$182M

+34% YoY

47,840
creator deals tracked

8
DTC verticals analyzed

200+
US brands on platform

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kaloiq.com/research/dtc-creator-spend-q1-2026

EXECUTIVE SUMMARY

Six things 200+ DTC brands taught us in Q1 2026.

DTC creator spend grew 34% year over year.

$182M in Q1 2026 vs $136M in Q1 2025 across 200+ tracked brands. Growth outpaced the broader IAB-reported creator ad spend by 8 percentage points.

Supplements is the fastest growing DTC vertical.

Supplement brand creator spend grew 58% YoY in Q1, the highest of any of the 8 DTC verticals we tracked. Beauty is the largest by absolute dollars but supplements is the most accelerating.

Fashion DTC creator spend declined 12% YoY.

Fashion was the only major DTC vertical to contract in Q1 2026. Brands cited rising creator rates and softening conversion. Several brands moved budget into pet (+42%) and supplements (+58%).

Mid-tier creators (100K-1M) now drive 32% of DTC creator spend.

Up from 24% in Q1 2025. The mid-tier is the only creator band where spend growth outpaced deal-count growth. Brands are paying more per creator, not just running more campaigns.

TikTok overtook Instagram in DTC creator spend share.

TikTok: 41%. Instagram: 38%. YouTube: 17%. Other (LinkedIn, Reddit, podcasts): 4%. Q1 2025 was a 36/42/18/4 split, with Instagram leading.

Repeat partnership rates climbed across every creator tier.

38% of all creators activated in Q1 were re-booked by the same brand within 90 days, up from 29% a year ago. The biggest jump was at the macro tier (61% vs 47% YoY).

> ### How to cite this report
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> When referencing data from the KALO IQ DTC Creator Spend Index, please use: *Source: KALO IQ DTC Creator Spend Index, Q1 2026.* Journalists are welcome to use any data point in the report. Press inquiries: press@kaloiq.com.

METHODOLOGY

How this data was collected and aggregated.

Data source

All data in this report is derived from KALO IQ platform activity across 200+ US-based DTC brand customers during the period of January 1, 2026 through March 31, 2026. The dataset includes 47,840 discrete creator-brand deals tracked through the platform during that window.

Anonymization protocol

Every data point in this report is reported in aggregate. No individual brand, creator or transaction can be identified from the report contents. We apply a minimum bucket size of N≥10 brands (or N≥40 creators) before publishing any statistic. Where a vertical or category would expose fewer than 10 entities, the bucket is merged with an adjacent category or excluded entirely.

Categorization

Brand verticals follow Standard Industrial Classification (SIC) mappings extended for DTC subcategories (e.g. supplements separated from broader food and beverage). Creator tiers follow standard industry definitions: nano (under 10,000 followers), micro (10,000-100,000), mid-tier (100,000-1 million), macro (1 million+).

Comparability

Year-over-year comparisons use the same cohort of brands measured in both periods, with new platform additions excluded from YoY comparisons to avoid composition bias. Q1 2025 baseline excludes brands not present on the platform for all of Q1 2025.

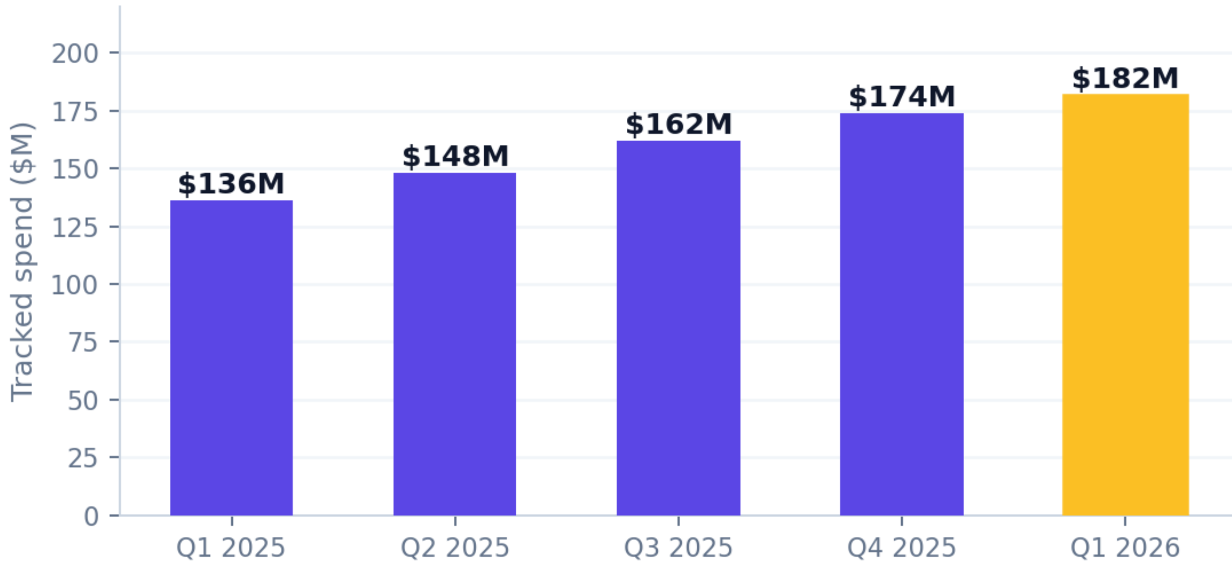
What is not in this report

We do not publish: (1) individual brand names or any data that could identify a specific brand, (2) individual creator names, handles or rates, (3) deal-level data, (4) any vertical or category with fewer than 10 brands in the bucket, (5) data younger than 30 days at publication. This is the same approach used by established industry benchmarks including Gartner Magic Quadrants and HubSpot's annual State of Marketing reports.

OVERALL SPEND

DTC creator spend grew 34% year over year.

DTC brands on the KALO IQ platform spent $182M on US creators in Q1 2026, up from $136M in Q1 2025. Growth was steady across all four quarters of 2025, accelerating into Q1 2026.



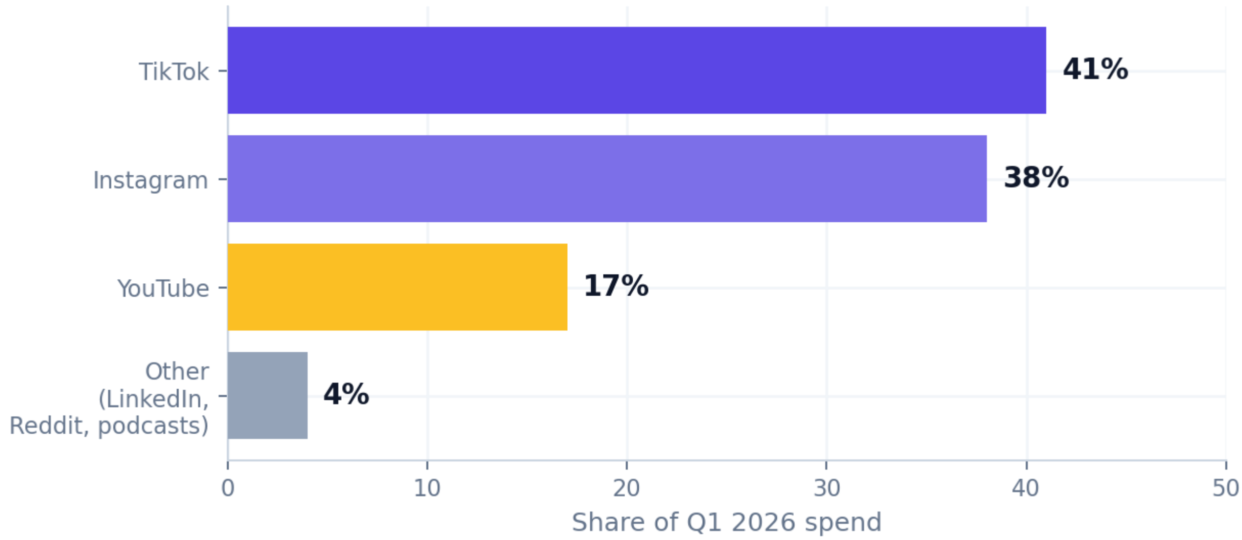
$182M	+34%	47,840
Q1 2026 total tracked spend	YoY change	Creator deals tracked

What this means: Creator spend growth is now outpacing overall digital ad growth by 4x, consistent with the IAB's November 2025 report. The shift is more pronounced inside DTC specifically because DTC brands index higher on social-first acquisition than enterprise advertisers.

SPEND BY PLATFORM

TikTok overtook Instagram in DTC creator spend share.

TikTok captured 41% of DTC creator spend in Q1 2026, surpassing Instagram (38%) for the first time on the KALO IQ platform. Q1 2025 was a 36/42 TikTok-to-Instagram split.



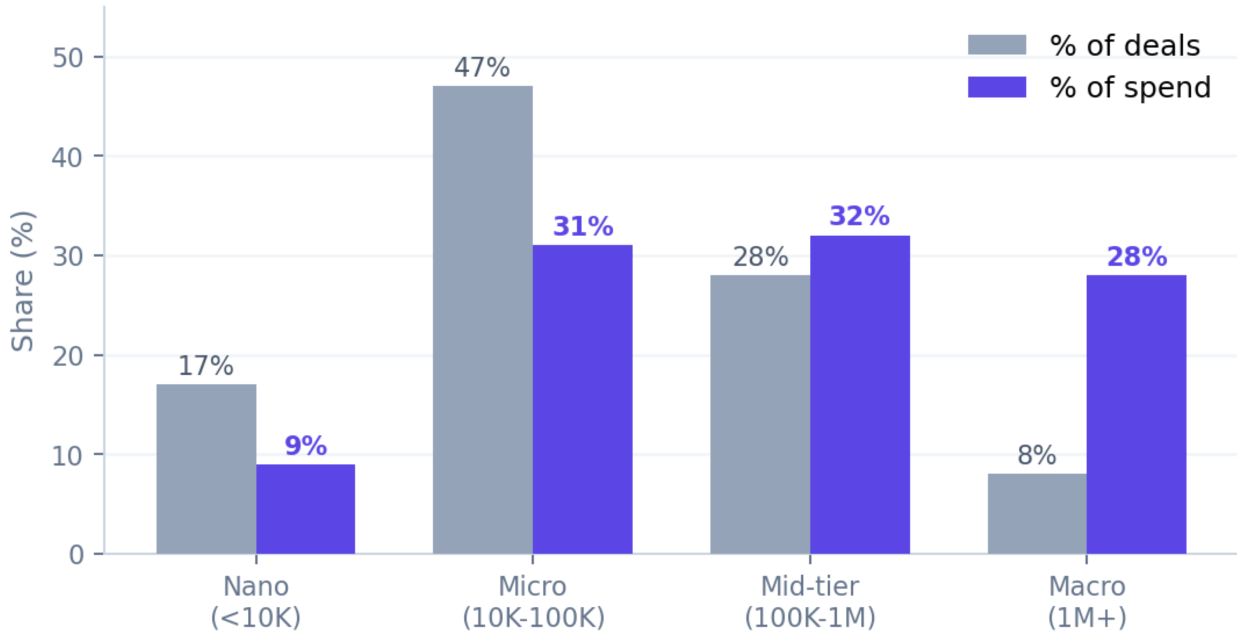
What changed. TikTok's resolved legal status in early Q1 2026 removed one of the major reasons DTC brands had pulled back budget in 2024. Brands that paused TikTok spend during the uncertainty reactivated by February. YouTube held its 17% share, driven entirely by long-form integration deals (not Shorts).

What did not change. Other platforms (LinkedIn, Reddit, podcasts, Twitch) collectively still hold under 5% of DTC creator spend. LinkedIn grew the fastest of the four in percentage terms but is still a rounding error in absolute dollars.

SPEND BY CREATOR TIER

Mid-tier creators are eating the budget.

The clearest structural shift in Q1 2026 was mid-tier creator (100K-1M followers) share of spend growing from 24% to 32% in one year. Macro and nano both gave up share. Micro held steady.



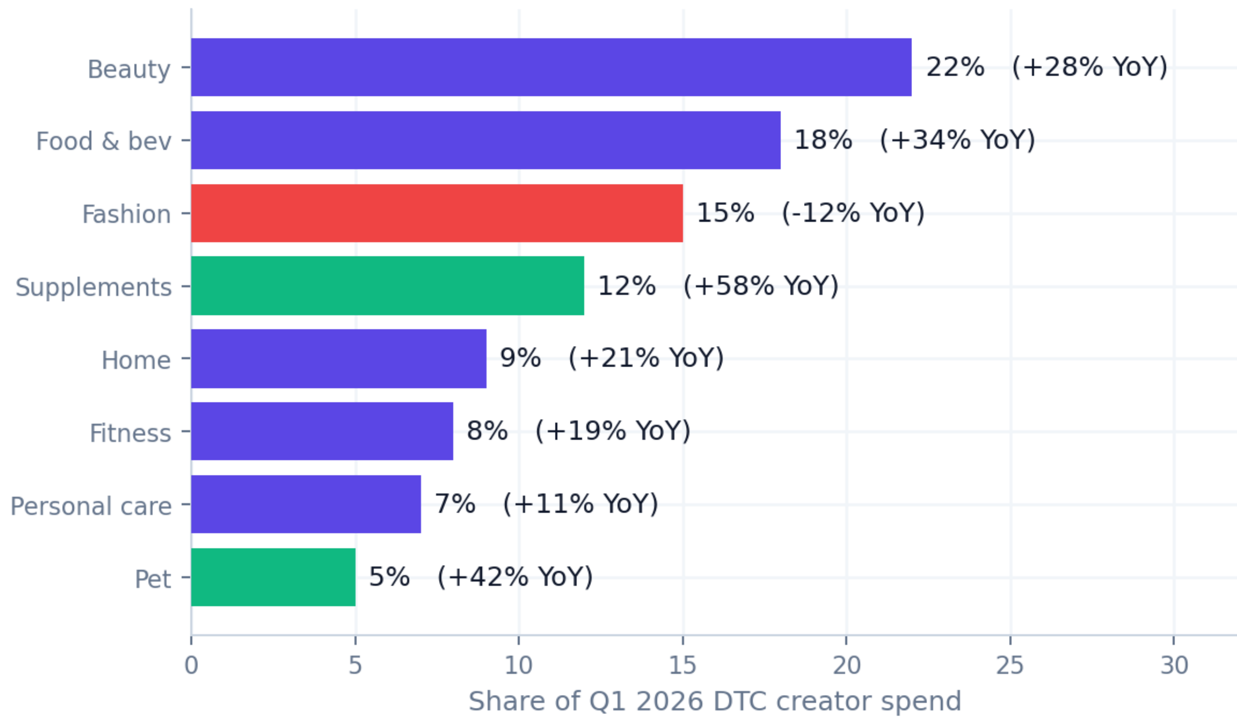
The deal-volume vs spend gap is the story. Micro creators still drive 47% of all deals but only 31% of spend, because per-deal rates are lower. Macro creators drive 8% of deals but 28% of spend. Mid-tier is the only band where deal share (28%) and spend share (32%) are roughly equal — meaning brands are paying mid-tier rates that match the volume.

Why mid-tier won. Brands learned in 2024 that pure-micro campaigns underperformed on conversion despite engagement rates, and macro deals were too expensive to defend ROAS on. The 100K-1M tier is the sweet spot for measurable conversion at scale.

SPEND BY DTC VERTICAL

Supplements is the fastest growing vertical. Fashion is the only one declining.

Beauty remains the largest DTC vertical for creator spend at 22% of total. But the growth story is in supplements (+58% YoY) and pet (+42%). Fashion shrank 12% YoY, the only DTC vertical to contract.



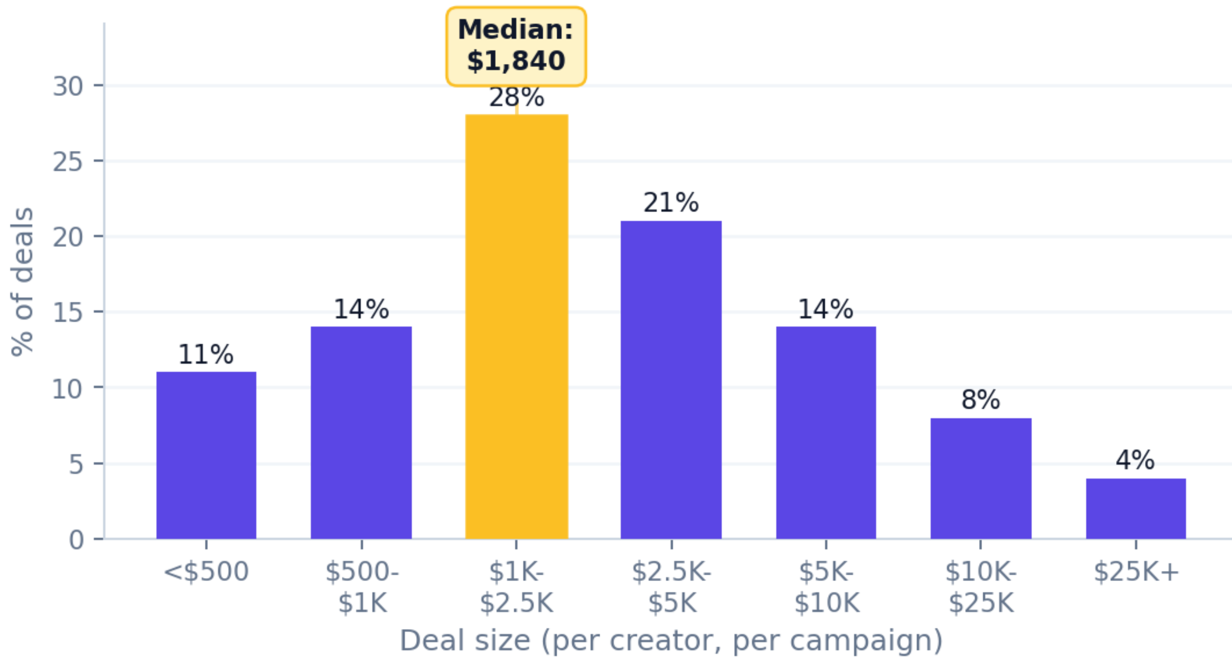
Supplements caught the GLP-1 tailwind. Creator content around metabolic health, protein and recovery exploded in Q1, with supplement brands capturing 12% of total DTC creator spend (up from 9% in Q1 2025).

Fashion's decline has two causes. First, rising rates among the fashion-focused creator class made the per-post math harder. Second, several large fashion DTC brands reallocated budget into paid social amplification of existing creator content rather than commissioning new content, which our data captures under platform spend rather than creator spend.

DEAL SIZE DISTRIBUTION

Median deal size: $1,840. But the distribution is bimodal.

Half of all creator deals in Q1 fell between $1,000 and $5,000. The median was $1,840. But the distribution has two bumps: a high-volume micro-creator cluster around $1,000-$2,500 and a long tail of macro-creator deals over $10,000.



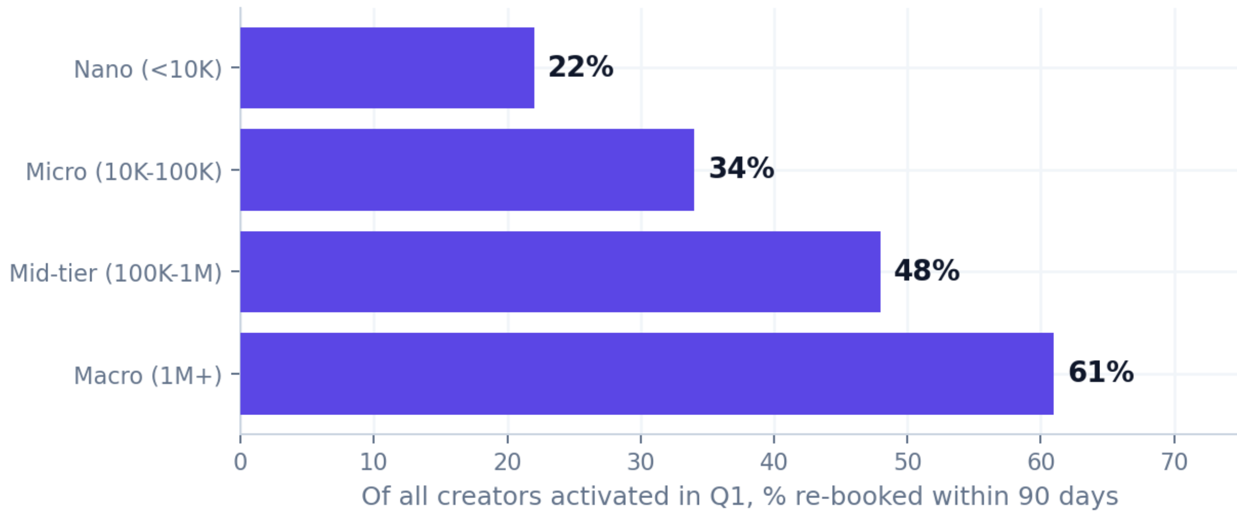
The $25K+ tier is more crowded than people think. 4% of all deals were over $25,000, accounting for nearly a quarter of total spend. Most of these are macro-tier integrated long-form deals on YouTube or multi-post Instagram + TikTok campaigns.

The under-$500 tier is growing slowly. Despite the rise of nano-creator programs, deals under $500 made up just 11% of activity in Q1, only 1 point higher than the prior year. Brands running nano programs tend to compensate with product gifting rather than cash, which doesn't appear in this dataset.

REPEAT PARTNERSHIPS

Re-booking creators is now the default, not the exception.

38% of all creators activated in Q1 were re-booked by the same brand within 90 days. A year ago that number was 29%. The biggest jump was at the macro tier (61% vs 47%) — brands that pay $10K+ for a deal increasingly want a series, not a one-off.



What's driving the shift. Brands have learned that creator audiences respond better to second and third placements than to first ones. The first post introduces the product. The second and third drive the conversion. One-off deals leave conversion on the table. The data is now obvious enough that brands are budgeting for series from day one.

What this means for creators. The economics of being a creator who can produce a 3-part series for a brand are improving fast. Solo deal-by-deal creators are increasingly outcompeted by creators with production capacity for a 90-day program.

OUTLOOK

What we expect in Q2 2026.

TikTok's share will grow to 44%.

The platform's recent ad product launches plus the resolved legal status will continue pulling reactivation spend through Q2.

Supplements will pass fashion in absolute dollars.

At current YoY growth rates, supplement creator spend will exceed fashion creator spend by July. The crossover is the headline of Q2.

Repeat partnership rate will pass 42%.

Brands are budgeting series, not one-offs. Q2 cohort renewal will pull the rate up another 4 points minimum.

Mid-tier spend share will hit 35%.

The structural shift toward 100K-1M creators is accelerating. The macro band will give up more share.

Paid amplification of creator content will grow faster than new creator commissions.

Brands are learning that boosting a winning organic post outperforms commissioning new content for the same dollars. Expect this trend to dominate the back half of 2026.

ABOUT KALO IQ

KALO IQ is the influencer marketing platform US brands use to find, vet and run campaigns with 10 million hand-verified American creators. Zero bots. Zero fake followers. Verified by humans, not scrapers. Founded December 2015 in Beverly Hills, KALO IQ now serves 200+ paying DTC, eCommerce and SaaS brand customers.

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