

HOLIDAY 2025 WRAP EDITION

The Motom Creator Commerce Report

What Holiday 2025 Revealed &
What's Next for Brand-Owned
Creator Commerce



motom

Introduction

Today, most brands approach creator commerce the same way they always have: launch a campaign, select creators, share links, and hope sales follow. Sometimes they do. Often they don't. And when they don't, it's hard to know why.

What's missing isn't creativity or influence. It's structure.

For years, doing that at scale was hard to see or repeat. Performance lived inside platforms and was often measured after the fact. That began to change in 2025.

Across thousands of creators in brand-owned programs, Holiday 2025 revealed repeatable, predictable performance. Not driven by algorithms or virality, but by applying the fundamentals of retail to creator-led shopping: clear product organization, curated collections, defined paths to purchase, and commerce experiences designed to help people decide. Retail merchandising has always guided how people shop. Creator commerce is no different.

At Motom, we work directly with brands and retailers to build and operate brand-owned creator commerce programs by combining infrastructure, performance measurement, and the expertise required to drive creator adoption, growth, and loyalty.

That perspective matters.

As brands look ahead, the question is no longer whether creator commerce works. It's whether it's being built to scale. The insights that follow are meant to help brands move from experimentation to a repeatable creator commerce operating model.

Creator Commerce Enters Its Infrastructure Era

> How To Read This Report

The insights below are aggregated and anonymized across multiple brand programs.

Categories referenced (fashion, beauty, home/lifestyle) reflect where creator-led shopping is most active, not the full scope of brand participation.

Performance reflects brand-owned commerce environments, not third-party marketplaces.

All performance signals are based on actual sales performance within the analyzed data.



Why It Matters

Creator commerce performs best when content, merchandising, incentives, and infrastructure are aligned - and weakest when creators are treated as distribution alone.

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Consumer Behavior ↘

In the 2025 holiday period, shoppers engaging with creator-driven commerce showed clear intent. They weren't just browsing for inspiration; **they were seeking direction.**

Retail has always used merchandising to guide shoppers toward what matters most. Creator commerce works the same way. With the right tools, creators can organize and surface products in ways that help people decide, not just discover.



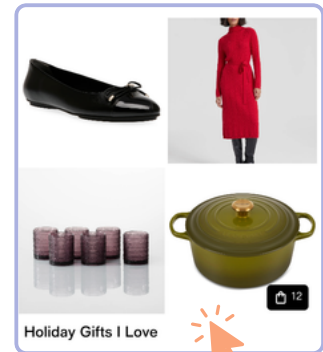
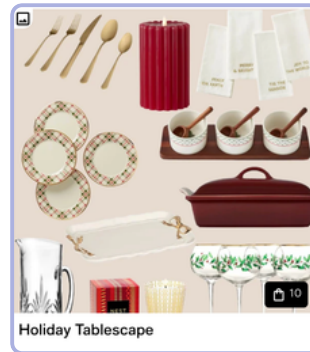
Key Insight:
Holiday shoppers responded to clarity, structure, and guidance.



Performance Signal:
Creator-curated product selections converted **117% higher than individual product links alone**, reinforcing the power of structure.



Rather than browsing endless product feeds, shoppers responded to curated shopping experiences - particularly collections and edits that reduced decision fatigue.



Strongest Creator Conversion Outcomes

Clear product context

Explicit value training

Structured paths to purchase



Why It Matters

As shopping becomes more creator-led and choice-heavy, brands and retailers that simplify decision-making will win consistently, not just seasonally.

Creator Economy Signals

The holiday period revealed increasing consolidation in creator performance. Sales were not evenly distributed across creator populations, but concentrated among creators who consistently drove measurable results, leaned into their brand relationships, and clearly understood how to engage their audiences with purpose.

Across thousands of creators analyzed:



A relatively small subset drove the majority of attributable sales



Content quality and shopping structure mattered more than audience size



Creators who activated storefronts and collections consistently outperformed those sharing single links



Key Insight:

Creators with tools to merchandise their recommendations consistently outperformed those relying on influence alone.



Performance Signal:

The **top 10% of creators** accounted for **70.6%** of total creator-attributed sales value during the holiday period.



Why It Matters

As brands measured outcomes more rigorously, performance consolidated around creators who could reliably convert.

This does not indicate a shrinking creator economy - it signals market maturation.

Brand & Category Trends

Peak retail moments amplify category-driven paths to purchase, a pattern consistently reflected in creator-led brand commerce program data.

	Key Insight	Performance Signal
Beauty Color cosmetics and complexion products dominated, supported by routine-adjacent skincare. Beauty converted well not because of impulse, but because creators could clearly demonstrate results.	 Beauty performed best when creators acted as educators and routine guides - not trend amplifiers.	 Top 10 beauty products represented 34% of beauty sales value , indicating meaningful long-tail depth.
Fashion Winners skewed toward outerwear, cozy layers, & giftable accessories.	Holiday fashion commerce favored practical, gift-safe items over trend experimentation.	The top 10 fashion products drove 52% of fashion category revenue .
Home & Lifestyle Performance centered almost entirely around comfort-driven items such as throws, blankets, and bedding.	Home commerce relied on a small set of recognizable hero products, not assortment discovery.	Top 10 home products represented 96% of home category revenue .



During the holiday period, category dynamics played a defining role in how products converted and how quickly shoppers moved from consideration to purchase.

Top Holiday Products

When ranked by sales volume across fashion, beauty, and home/lifestyle categories, holiday product performance followed a clear pattern. Products tied to ease of demonstration and routine-based use cases, driven largely by beauty, consistently outperformed novelty.

High-performing products consistently:

- Fit into repeatable routines
- Were easy for creators to demonstrate
- Offered clear value per use, not just price

Across Top 100 Products By Sales Revenue

Beauty

71%

Fashion

13.2%

Home & Lifestyle

13.3%

Category mix within the top-performing products from Oct - Dec 2025;
2.5% represent other categories.



Why It Matters

Products that could be shown, explained, and re-used outperformed trend-driven or abstract items.

”

Beauty drove both unit volume and revenue, fashion revenue came from higher-value items, and home centered on hero products, reflecting distinct category economics.

Merchandising & Conversion

How creators merchandise their recommendations has become a primary driver of conversion. Highest-performing content was not defined by reach or virality. It was defined by structure.

Creators who treated content as merchandising, not brand messaging, drove stronger and more predictable performance.

1

Curated collections

2

Explicit value framing

3

Routine-based storytelling

4

Single-product promotion without context consistently underperformed



Key Insight:
Product organization consistently outperformed virality.



Performance Signal:
Collection-led experiences drove more than 2x the conversion of single-product pathways.

Platform Dynamics

Holiday performance underscored a clear separation between platforms optimized for discovery and those optimized for conversion.

- Discovery-oriented platforms drove top-of-funnel engagement
- High-intent platforms delivered materially stronger sales efficiency
- Differences held even when creators performed similarly across platforms



Key Insight:

Holiday performance was not about “which platform wins,” but about how platforms function at different points in the shopping journey.



Performance Signal:

TikTok continued to dominate discovery, but Instagram emerged as the higher-intent shopping environment.



TikTok

→ Drove larger top-of-funnel view volume

Instagram

→ Delivered higher CTR and significantly higher CR

Category Impact

→ The gap widened for beauty and fashion



Platform intent shaped outcomes. When comparing the top 100 creators by sales on each platform, the conversion difference was clear and consistent.

What It All Means

Holiday 2025 didn't tell us that creator commerce works. We already knew that. It showed us what happens when brands and creators move in sync.

Creator commerce succeeds when creators are treated as partners, not placements. When performance is visible, collaboration is intentional, and structure replaces guesswork. In that environment, performance is not assumed. It is earned together.

Structure Beat Scale

More creators and content did not outperform better product organization.

Curation Beat Choice

Creator-curated shopping paths consistently outperformed endless choice.

Systems Beat Hype

Influence alone could not drive predictable revenue without infrastructure.

Final Takeaway

Creator commerce has entered its infrastructure era. Influence created attention. Infrastructure creates growth. Brands must move from participation to ownership in shaping their creator-led retail journey.

Looking Ahead

So what comes next for creator commerce and brand ownership?

These six shifts highlight where momentum is building and where brands should act now to take back control of the customer journey.

1

Brands deepen investment in owned creator-commerce infrastructure, shifting control away from platforms and to how they can optimize, measure, and evolve.

2

Creator selection for paid partnerships and media favors merchandising skill over raw reach, prioritizing creators who organize, contextualize, and convert.

3

Curation overtakes disparate product linking, reflecting how consumers make decisions and where creators see their earnings increase.

4

Creators extend the retail experience, shaping consumer behavior through content paired with always-on, brand-aligned omnichannel shopping.

5

Category-specific playbooks outperform one-size-fits-all strategies, as brands plan creator activations around category discovery and conversion.

6

Conversion is a primary measure of creator impact, replacing impression-led success with performance accountability across commerce touchpoints.

This is the moment. The time is now. We're here to help our partners and their creators turn this shift into long-term revenue and lasting customer relationships.

For more information, please email us at partnerships@motom.me.

About Motom

Founded by veteran retail and media operators, Motom delivers the most complete creator commerce ecosystem in the industry. From storefronts and affiliate links to campaigns, community, and performance analytics, we help leading brands own the creator channel and turn influence into measurable growth.

Our Goal

Level the playing field for retailers and brands seeking to **own their creator commerce channel and scale it as a revenue engine**. Put you back on offense so you can combat the business disruption caused by third-party social commerce platforms and turn creator content into a growth opportunity.

Our Approach

Unlike most companies or agencies that either manage creators or optimize affiliate programs, Motom provides the infrastructure, data, and managed services that let retailers and brands own both. We operationalize the connection, giving **brands technology, data, and accessible expertise to make creator-driven commerce both scalable and measurable**.

- | | |
|-------------------------------------|------------------------------|
| → Creator-Tested & Approved Backend | → Pristine, Proven Platform |
| → Fast, Flexible Deployment | → Modular, Easy-to-Use Tools |
| → API-First Enabled Architecture | → Agile Innovation Roadmap |

Methodology & Data Scope

This report is based on aggregated, anonymized Motom performance data collected across multiple brand-direct creator commerce programs during the 2025 holiday period.

Data includes:

- Sales performance from creator storefronts, collections, and product-level transactions
- Activity across thousands of creators operating within fashion, beauty, and lifestyle ecosystems
- Brand-owned commerce environments (not third-party marketplaces)

Important context:

- Findings reflect how creator-led shopping performed where creators actively guide purchase decisions
- Results do not represent all retail categories or the full consumer market
- Rankings and “Top 10” lists are based on actual sales performance within the analyzed data
- This approach allows the report to surface directional performance patterns while preserving brand confidentiality