TRANSPORTATION THINK TANK

Following the Travellers

The Role of Travel Influencers and Social Media in Airline Advertising



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Date: 6 November 2026

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EXECUTIVE SUMMARY

This study examines the role that travel influencers and social media play in the advertising strategies of airlines. Travel influencers are a group of hypermobile professionals with a passion for travel and for sharing their experiences. They monetise this passion by creating sponsored content on social media that promotes destinations. Airlines are among the companies that pay these professionals for sponsored content. They may pay fees or provide free flights in exchange for promotional posts and other social media content.

The study finds that the destinations visited by these influencers are typical tourist places, such as major cities, islands, historical sites, natural wonders, and sports areas. In addition, influencers favour photogenic destinations with aesthetic appeal — places that stand for exclusivity and remoteness. Among the cities they visit, many are served by airports that function as global hubs, such as London, Dubai, and Istanbul. These cities serve not only as destinations but, in many cases, also as gateways to the surrounding region. In addition, they seamlessly connect other parts of the world, thereby facilitating the continuation of the influencers' journeys.

The travel influencers' recommendations are embedded in stories that feature photogenic locations. Through their visual storytelling, they enjoy a competitive advantage in promoting comfort and exclusivity. Conversely, this reduces the inclusion of certain realities and travel tips — specifically those focused on avoiding unpleasant situations such as overcrowding or long queues — at the risk of being misleading. By popularising specific photogenic spots, influencers contribute to overtourism and crowding.

The distances travelled by travel influencers are very high. Air travel is the norm, and long-haul flights predominate compared to medium- and short-haul flights. Among the flights taken by a sample of 25 travel influencers with at least 100,000 Instagram followers, 49% were long-haul flights, accounting for 79% of climate-relevant emissions. Each Instagram account averaged nearly 16 flights in 2025, resulting in average CO_2e emissions of 10.0 t per influencer from air travel alone. Travel patterns are often global, though there are also influencers whose travels are limited to specific places or continents. For comparison: European tourists take an average of four leisure (round) trips per year, with 95% of tourism trips by EU residents being domestic or to another EU country. This corresponds to approximately 0.6 t CO_2e per tourist per year from domestic and intra-EU leisure travel by all transport modes.

Airlines are increasingly using social media for advertising, and based on the available data, it is likely that they allocate the largest marketing budget to this channel compared to other (digital) channels. Social media is used to build brand image, inspire travel desires, promote destinations, and directly trigger the booking process for vacations. Other digital channels cannot influence potential customers' decision-making processes as comprehensively. A rough estimate based on the available data suggests that all airlines combined spent approximately €0.5 billion on advertising across five digital channels—social media, websites/apps, search engines, connected TV, and retail media—in the EU-27, Norway, Switzerland, and the UK in 2025. Social media accounted for roughly one third of this spending.

In addition to spending on social media platform ads, airlines particularly leverage celebrities, companies, and travel influencers to conduct marketing on their behalf. This creates significant additional quantifiable marketing value (likes, comments, shares, saves). In the case of travel influencers, this approach is particularly cost-effective from the airlines' perspective, as it can generate substantial visibility at relatively low cost. Travel influencers, in turn, embed sponsored content as organically as possible, since overtly promotional posts undermine both their credibility and the advertisement's reach. Literature suggests a lack of hashtags disclosing sponsored content.

The power dynamic between airlines and travel influencers is highly unequal. Travel influencers love to travel, and by promoting brands such as airlines, they can do so more affordably. Airlines, in turn, have extensive marketing budgets; the cost of engaging travel influencers is negligible by comparison. At the same

time, airlines are aware of influencers' multiplier impact. Regional airlines use them to highlight the routes they operate, such as flights from major hubs to remote areas or intra-European flights. Global airlines collaborate with travel influencers primarily to showcase that they serve all major destinations, including typical tourist places. The results also suggest a potential link between travel influencers' emissions and their followers' travel behaviours, though further research is needed.

If policymakers want to curb the negative environmental impacts of these business practices, they could work on taxation strategies and refine existing legislation to enhance transparency around sponsored content. Platforms could deprioritise or exclude high-emission travel content, and flag misleading exclusivity claims.

1) INTRODUCTION AND METHODOLOGY

Influencers on social media rely on aesthetic, aspirational, and relatable imagery to create a cohesive personal brand. This imagery serves as a visual language that communicates values, lifestyles, and identities. Brands benefit from this when the influencer's imagery subtly associates the brand with those same values, making the brand feel more authentic and desirable to followers. An alignment between the influencer's imagery and the brand's identity is critical. When an influencer's content (their style, tone, and visual themes) matches the brand they promote, followers are more likely to develop a positive attitude toward the brand. This alignment allows influencers to monetise their ability to integrate brand messaging seamlessly into their content, making sponsored posts feel organic rather than forced (De Veirman et al., 2017; Lou & Yuan, 2019; Ahn et al., 2022).

A travel influencer is a person who creates and shares travel-related content and has built an audience that follows their recommendations, experiences, and perspectives on destinations, hotels, airlines, activities, or travel products. Travel influencers should be understood as marketing partners within the tourism industry (Asan & Yolal, 2022). Their communicative effectiveness is shaped by interaction, credibility, and authenticity (Fernández-Blanco et al., 2026).

Airlines increasingly use social media as part of their advertisement efforts. It has been found that social media marketing activities have positive effects on airlines' brand awareness and brand image. Brand awareness, in turn, positively affects the users' commitment with the airline. Social media also influences customer perceived value and purchase intention. Airline social media ads have higher recall rates compared to traditional channels such as TV or out of home advertisements, and they are regarded as a cost-effective tool, offering a competitive edge over traditional channels (Seo & Park, 2018; Xia et al., 2024).

Existing research shows that travel influencers significantly inspire destination selection (Ong & Ito, 2019; Luo et al., 2026). Especially luxury travel experiences shared by similar others on social media stimulate consumers' own intentions to visit the same destination (Liu et al., 2019). Factors of success are influencer type, platform, content characteristics, alignment between influencer and destination, and exchange between travel influencer and follower (Saini et al., 2024; Luo et al., 2026).

Civil society organisations argue that travel influencers not only function as advertisers for tourism sectors, but also encourage carbon-intensive lifestyles, as they help normalise frequent flying and long-haul travel (Bazin & Cousin, 2023). Research also found that travel influencers frequently advertise and promote far-off, remote, and exclusive destinations, often emphasising long-haul travel and hypermobility (Femenia-Serra et al., 2026).

Considering this background, this study examines the role travel influencers play in the advertising strategy of airlines. Some airlines disclose "other operating expenses" or similar categories in their annual reports, which include sales, marketing, and advertising budgets. There is no indication in publicly available documentation that airlines publish their social media marketing budgets. Similarly, there is no evidence of budgets for travel influencers or their earnings from airlines. Furthermore, research has yet to explore what specific objectives airlines aim to achieve through advertising with travel influencers.

These questions are raised in the context of aviation's reliance on fossil fuels, which continues to drive its climate impact. In 2023, aviation accounted for 2.5% of global energy-related CO_2 emissions, having grown faster between 2000 and 2019 than rail, road or shipping (IEA, 2025). Existing policies to decarbonise air transport mostly aim at promoting the adoption of sustainable aviation fuels (Kivits et al., 2024). Despite this, policy responses fall far short of what is needed to meet global emissions targets, as air transport emissions keep rising (Gössling et al., 2026). For the critical decade leading up to 2030, the most effective means of reducing aviation emissions is to reduce aviation demand. To date, green technologies have not been deployed at a scale sufficient to deliver meaningful emissions reductions (Gössling et al., 2024). The

projected timeline for the widespread adoption of sustainable aviation fuels and zero-emissions aircraft extends beyond 2030. Over time, however, these technologies are expected to play a significant role in mitigating aviation emissions (Gössling & Humpe, 2024).

To examine the role travel influencers and social media play in the advertising strategies of airlines, this study aims to explore the following:

- Travel Influencers:
  Which product and service categories do they promote?
  What are their marketing strategies?
  How much do they earn?
  What types of travel and destinations do they promote?
  What is their personal motivation to become a travel influencer?
- Airlines:
  What are airlines' typical marketing budgets?
  How much is their social media budget?
  What role does social media play in airline advertising strategies?

By bringing these two perspectives together, we aim to more precisely explain the role of social media, and more specifically, the travel influencers' part in airplane marketing. The following sections explain the research methodology. Subsequently, Chapter 2 is dedicated to map a sample of travel influencers' activities. Chapter 3 depicts airlines' marketing activities, mainly their ad spend on social media channels. Chapter 4 concludes by discussing the research questions on this basis.

Travel Influencers' mobility

Literature review

We collected, reviewed, analysed, and synthesised existing literature which discusses travel influencers' lifestyles, destinations and airline marketing. We focused on high-quality scientific articles published in peer-reviewed journals and assigned a Digital Object Identifier (DOI). The search focused on academic databases, including Web of Science, Scopus, and Google Scholar. We also reviewed the bibliographies of relevant studies to identify additional scientific literature. Where necessary, we complemented the academic literature with non-academic sources of data and information, particularly where market-related information was required.

The literature analysis was facilitated by Gemini Notebook. This AI-powered research and note-taking tool is designed to help users organise, summarise, and generate insights from their uploaded documents. It automatically creates overviews of uploaded documents and source-based answers, that is, it answers questions using only the content from the uploaded documents (no external data or hallucinations). It also provides direct references to the original sources for transparency.

Mapping of travel influencers

We searched travel influencers to exemplify their activities. We analysed a) their visual language and b) their travel behaviour.

We started from two websites to identify potential travel influencers, namely World social media directory (2021) and Collabstr (2026). Both websites list influencers by topic and social media platform. The former listed 278 traveller profiles at the time of access (however, many listed there had already retired as influencers by 2025). The latter platform's filter system includes a category for 'travel', allowing users to narrow down influencers who tag 'travel' as one of their topics. Using this filter, we identified 880 profiles in the travel category with at least 100,000 followers on Instagram.

We focused on content creators with a minimum of 100,000 followers on Instagram. Instagram is regarded as the dominant platform for travel content (Femenia-Serra et al., 2026). The threshold was set to provide ample content for analysis. To qualify as a travel influencer, each influencer had to meet specific criteria:

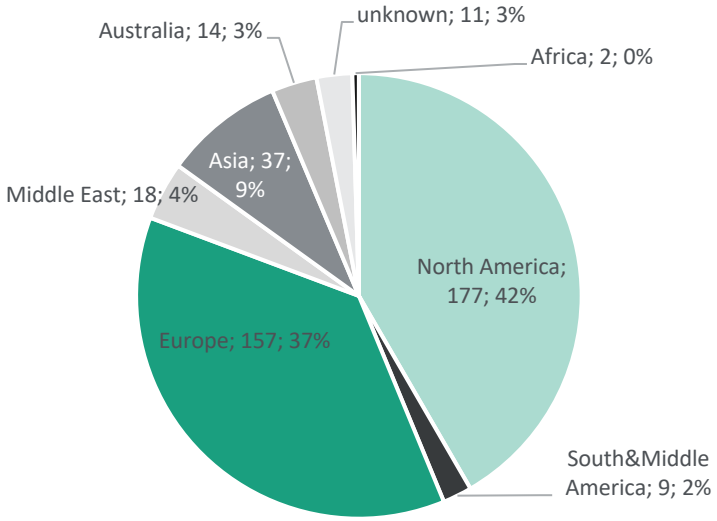
First, they must describe themselves as travel content creators by observing their travel orientation, as evidenced by the biography keyword 'travel', but also by their travel tips, vlogs, journalism, and photography. We also checked whether they followed other content creators with a travel focus themselves.

Second, they must produce travel content as their core activity. To verify the candidate list, we briefly manually reviewed their Instagram posts.

Third, they must be commercially engaged in the travel industry. That is, they endorse products or services that promote a destination. Content is sponsored by national tourism boards, destination marketing organisations, accommodations, travel agents, travel platforms, transportation services, leisure activities, on-site experience, cultural events, or sports.

The data collection period was May and June 2026, covering influencer activity from the 2025 calendar year. Overall, we found 425 travel influencers matching the above criteria. We collected the name, Instagram handle, follower count (100K+), and country of residence. The analysis of 425 travel influencers reveals that the majority are based in Europe or North America (334 individuals and couples or 79%; see Figure 1).

Figure 1: Travel influencers' continents of residence, 2025 (N=425)



Source: Own research T3

Analysis of visual language and imagery:

From the list of 425 travel influencers, we drew a random sample of 250 individuals whose visual language we analysed. To do so, we briefly examined individual posts and looked for recurring visual motifs and imagery. For the sample of 250 travel influencers whose visual language we analysed, we also counted the number of Instagram posts they published in 2025. Table 1 provides an overview. Annex C contains the full (anonymised) list of 425 travel influencers that were identified.

Table 1: Instagram travel profiles with content posted in 2025, at least 100,000 followers

	Range	Arithmetic mean	Median
No. of followers (N=425)	100,000 – 24.3M	612,273	237,000
No. of posts (N=250)	0 – 435	121.7	105

Source: Own research T3

Analysis of travel behaviour:

From the first sample of 250 travel influencers, we drew a second sample of 25, which we subjected to an in-depth analysis of their travel behaviour. We identified Instagram 'Highlights' as the most consistently structured source for reconstructing travel timelines. Travel influencers typically organise their trips as separate 'Highlights' collections, allowing us to track their destinations and activities sequentially. Since 'Highlights' are organised by calendar weeks, the calendar week serves as the temporal unit of analysis. Only accounts that documented their destinations with sufficient consistency and detail across the full year could become candidates to be analysed in depth. This was identified in 45-50 cases.

These influencers usually revealed the means of transport used on each trip, as we also checked the audio recordings of their videos. This was especially the case on some intra-European (domestic) journeys, where a train or car would theoretically have been an alternative to the plane. However, in our sample the plane appeared to be the default option for trips longer than 250 km.

When explicit (flight) information was unavailable, two assumptions are applied — both are methodological limitations rather than confirmed travel behaviour. First, when a new destination appeared in an influencer's 'Highlights' within three weeks of the previous documented location, direct travel between the two was assumed, with no return to the home base in between. Second, when more than three weeks passed without a new destination, we assumed the influencer to have returned to their residence.

Furthermore, it was generally not possible to distinguish between intermediate stops and destinations within a trip. Unlike business travellers and many tourists, travel influencers often treat the journey itself as part of the destination. Consequently, activities and events along the way may provide material for storytelling, while intermediate stops and transfers between modes of transport may remain undocumented.

There is no registry or membership list to establish the sample's representativeness. However, similar travel patterns were found in a recent study, in which the authors analysed a list of 100 Instagram profiles who they regarded as top 100 travel influencers. "The main flows occur between Europe and North America […]", which is also the case in our sample. These influencers travelled 77,324 km per year in the three years 2022 to 2024 (Femenia-Serra et al., 2026).

In our sample of 25 Instagram profiles, the average distance covered across all commercial flights was as high as 72,244 km, and thus comparable to the distances reported by Femenia-Serra (2026). Twelve profiles were based in Europe, nine in North America, two in the Middle East, and one each in Australia and Africa. This reflects the distribution of the profiles' residences in our initial sample of 425 influencers (see Figure 1).

Therefore, the sample should be representative for accounts with at least 100,000 followers on Instagram. These are established and commercially successful travel influencers who are structurally embedded within global commercial networks.

Travel influencers' climate impact

A key part of the analysis of the travel influencers' travel behaviour is their climate impact. The focus is on flight activity. Upstream emissions and other mobility, including further travelling, are excluded. We calculated CO_2 emissions for all flights in the sample using Eurocontrol's Small Emitters Tool (SET; Eurocontrol, 2024). The SET estimates fuel burn and associated CO_2 emissions for an entire flight based on the characteristics of air traffic covered by the EU emissions trading scheme. According to Eurocontrol, it accurately estimates CO_2 emissions for a list of flights characterised by aircraft type and flown distance, using the averaging principle.

We analysed the flights as provided by Eurocontrol (2025) and FlightGlobal (2026) to determine typical, widely used aircraft types and to approximate these aircraft types' market shares on short-, medium- and long-haul flights (Table 2), thereby representing the varying fuel consumption of technical variants.

Table 2: Selection of aircraft and predetermined shares for calculation of CO_2 emissions

Aircraft type	Typical range	No. of seats	Short haul < 1,500 km	Medium haul 1,500-3,500 km	Long haul > 3,500 km
1 Airbus A220-300	5,700–6,400 km	140	15%	-	-
2 Boeing 737-700	5,250–6,000 km	130	35%	35%	-
3 Airbus A320	6,100–6,850 km	175	50%	50%	10%; < 5,000 km
4 Boeing 787-9	11,600–14,100 km	305.4*	-	15%	35%
5 Boeing 777-300ER	13,650–14,650 km	305.4*	-	-	30%
6 Airbus A350-900	15,000–16,100 km	305.4*	-	-	25%

*Source: Own assumptions T3 based on Eurocontrol, 2025 and FlightGlobal, 2026 *Source: Rudolph & Riach, 2025*

Regarding the distance categories in Table 2, the definitions of short-haul, medium-haul, and long-haul flights were based on those outlined in the EU Air Passenger Rights Regulation (EC) No 261/2004. Specifically, these are: up to 1,500 km, 1,500 km to 3,500 km, and over 3,500 km. The flight distances are specified by calculating the spherical (great circle) distances between two airports (Haversine formula).

We calculated load factors to determine fuel consumption per passenger (i.e., per travel influencer). Based on an IATA report (2024), the calculation assumes a load factor of 83.5% for all economy and premium economy, and 92% for all business class and first class flights in our sample of 25 travel influencers.

We assumed average seat numbers as listed in Table 2. Airbus A220-300, Boeing 737-700 and Airbus A320 are narrow-body aircraft, which are mainly used for short- and medium-haul flights. The sample of 25 travel influencers did not highlight the usage of premium class in these aircraft. Applying the seat numbers and load factors mentioned earlier, the CO_2 emissions per passenger per flight are 0.86%, 0.92%, and 0.68% for these three aircraft, respectively.

For the wide-body aircraft listed (aircraft types 4–6 in Table 2), we performed calculations based on an own study (Rudolph & Riach, 2025). This study uses empirical data to determine the average number of seats in each cabin class on wide-body aircraft; and it uses CO_2 factors per cabin class based on IATA (2025). It applies the load factors mentioned above (IATA, 2024). The calculation shows that on wide-body aircraft, each passenger in first class accounts for 1.33% of a flight's CO_2 emissions, each passenger in business class for 1.06%, each passenger in premium economy class for 0.40%, and each passenger in economy class for 0.27% (Rudolph & Riach, 2025). These calculations are in line with those presented by the International Council on Clean Transportation (ICCT) in an earlier publication (Graver et al., 2020).

To derive non-CO_2 climate effects from aviation, we applied a multiplier factor of 1.7 to CO_2 emissions from fuel burn. The factor is informed by Lee et al. (2022).

Airline Ad Intel

Data on advertising investments by airlines

Data was provided by Nielsen. Nielsen Ad Intel is a comprehensive advertising intelligence service that provides detailed data and analysis on advertising activity across a broad range of media channels. The platform monitors advertising expenditure, creative executions, media placements, and competitive activity. The service is widely used to inform strategic decision-making, assess advertising investment, and enhance understanding of the competitive dynamics within an advertising marketplace.

Nielsen has provided advertising expenditures of 25 largest airline brands, as defined by their ad spend, in five European markets in 2025. Air France and KLM, for example, count as separate brands, although they belong to the same company. The five national markets are France, Germany, Netherlands, Spain, and the United Kingdom. The airports located in these countries are among the busiest airports for passenger traffic in Europe and leading long-haul hubs. They are also amongst the countries in which policies on fossil fuel ad bans have been introduced at the municipal level.

The Nielson ad statistics define ten categories, of which five are traditional channels and further five digital channels:

- TV, print, cinema, radio, and out of home are the traditional advertisement channels.
- Online, search (engines such as Google), connected television (CTV, such as Netflix), social media, and retail media are digital channels.

Nielsen's monitoring of the digital media channels is currently being rolled out in phases. We received data about 'online' and 'social' in 2025, in addition we were provided with preliminary data about 'search' and 'CTV' in Germany and UK in the first quarter of 2026.

In each of the five countries, Nielsen identified the 25 airlines with the largest marketing budgets based on its own available 'online' and 'social media' data. According to Nielsen, the traditional channels and retail media only play a very minor role in airline advertisement budgets.

The monitoring methods are as follows (see Annex A for details):

Social media: The data is captured via a human panel (with explicit user consent), whose activities on Facebook, Instagram, TikTok, and X (formerly Twitter) are tracked across desktop/laptop, mobile phones, and tablets in all five countries. A panel tracking software detects the ad occurrence on the display of the participants. In France, Nielsen has additionally covered Pinterest and LinkedIn. In Germany, Nielsen has additionally covered Pinterest, LinkedIn, and Reddit since July 2025. In the UK, Nielsen additionally covers LinkedIn.

Online: Nielsen uses a reporting-based system in cooperation with digital marketers or ad networks such as Google Display Network. These marketing players send Nielsen monthly reports of gross ad spend generated on their marketed websites, newsletters, and campaign pages. Nielsen assigns each record to its market and media taxonomy (product, company, industry sector).

Search: Nielsen uses an automated crawler. They query ~80,000 keywords four times per day on Google.de (Germany) and Google.co.uk (UK) and capture all Google ads from the first results page. The ads are recorded by advertised domain and by calendar week.

Connected TV (CTV): Nielsen uses a Smart TV opt-in panel of ~200,000 households in Germany and UK, respectively. Their data partner installs monitoring applications (with explicit user consent) on Smart TVs and connected devices, monitoring them 24/7 and extracting all identified ads directly from the TV device. Platform coverage (from January 1, 2026): Amazon Prime Video, Netflix, Disney+, YouTube Smart TV, amongst others.

Ad Spend at social media is calculated by multiplying the impression data for each captured ad event with the unit cost (CPM, cost per mille) an advertiser pays for that event. Further information on paid social media coverage and ad spend estimation methodology is provided in Annex B.

2) MAPPING THE INFLUENCERS

Influencers monetise their online presence via revenue streams leveraging audience reach, credibility, and engagement (Purwandari et al., 2022). These include sponsored content, affiliate marketing (unique referral links/discount codes), platform-specific advertising and creator programmes, sales of proprietary products/services, and paid collaborations like brand ambassadorships or public appearances. The importance of these streams varies by audience size, platform, and niche (Femenia-Serra et al., 2026; see Table 3).

Table 3: Instagram influencer categorisation, 2026

Category	Follower Count	Typical Characteristics	How brands typically use each tier
Nano Influencer	1,000–9,999	Very engaged niche audiences, high trust, affordable collaborations	Local businesses, authentic product reviews, community building
Micro Influencer	10,000–100,000	Strong engagement, specialised content, popular with small and medium-sized brands	Performance marketing, niche audiences
Mid-tier Influencer	100,000–499,000	Professional creators with broad reach and generally good engagement	National campaigns, product launches, wider awareness
Macro Influencer	500,000–999,999	Large audience, significant brand recognition, higher campaign costs	Major brand campaigns with substantial reach
Mega Influencer	1 million+	Celebrities or top creators with massive reach & global recognition	Global campaigns, celebrity endorsements, ambassadorship

Source: Based on Rodríguez & Sixto García, 2022; Metricool, 2026

As depicted in Table 3, success relies on the social exchange between the influencer and their followers. While many users consume content passively, active responses to comments and inquiries are essential for building the trust needed to determine travel choices (Saini et al., 2024). For Generation Z specifically, the most valued travel influencer traits are sincerity and transparency, such as the clear disclosure of financial partnerships and providing "unfiltered" reviews (Băltescu & Untaru, 2025).

Travel influencers' endorsements typically fall into two categories, namely those directly related to the tourism industry, and those related to lifestyle or consumer products in general. The core involves the former: Travel influencers promote the destination itself. They are frequently invited by national tourism boards and destination marketing organisations to promote specific regions, cities, or local attractions (Femenia-Serra & Gretzel, 2020). They likewise often showcase accommodations such as upscale resorts, five-star hotels, and urban boutique hotels (Femenia-Serra et al., 2026). There is also a niche for accommodations following principles of sustainable tourism (Bazin & Cousin, 2023).

In addition, travel influencers act as representatives for online travel agents, flight comparison sites, and discount travel platforms. As they travel to different destinations, travel influencers frequently collaborate with airlines to promote specific flight routes, and premium cabin classes like first or business class (Bazin & Cousin, 2023).

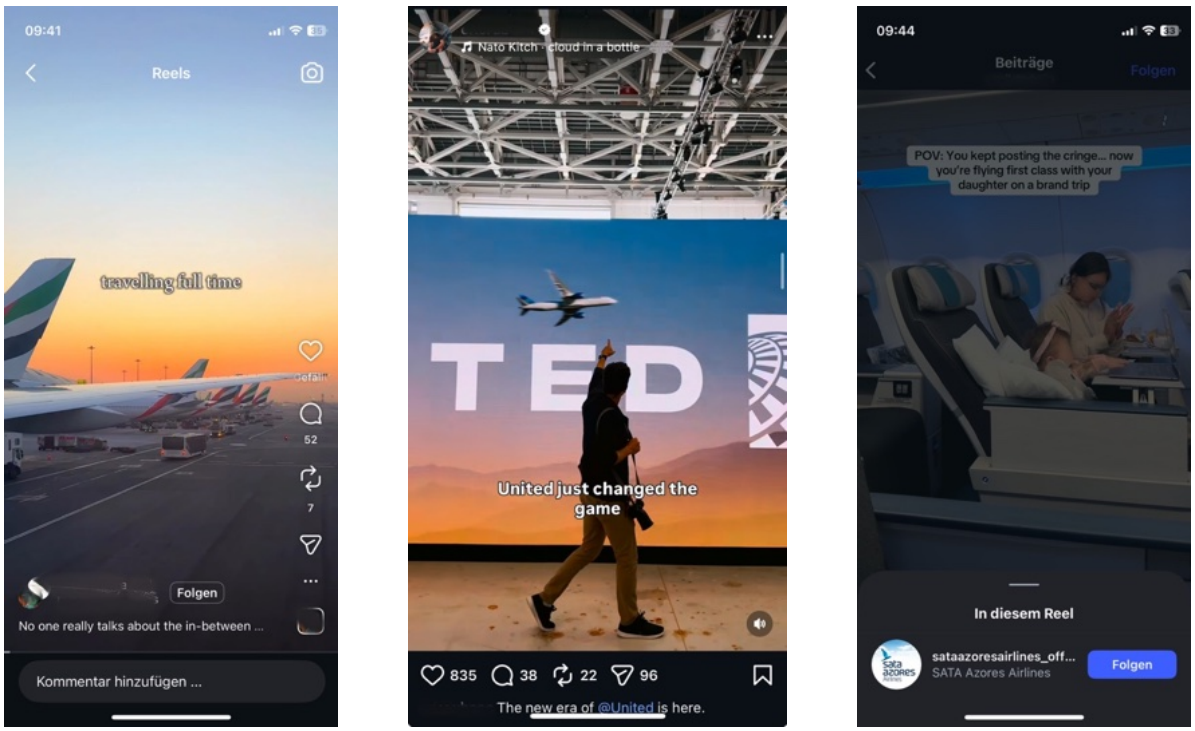
Travel influencers frequently highlight leisure activities and on-site experiences. The content commonly features local attractions and cultural events, including museums, historical landmarks, and festivals (Li et al., 2026). Furthermore, influencers often recommend adventure-based and recreational activities, including paragliding, skateboarding, and cycling, thereby encouraging followers to participate in destination-specific experiences (Purwandari et al., 2022; Li et al., 2026). Gastronomy also constitutes a central element of travel-

related content, with influencers regularly showcasing authentic restaurants, local street food, and regional culinary specialties (Fernández-Blanco et al., 2026).

They do not only receive monetary compensation but are also invited to services and products (Kirilenko et al., 2024). Many established travel influencers diversify their revenue streams by developing and marketing proprietary (digital) products, such as travel planning e-books, comprehensive travel itineraries, and photography presets for social media content creation (Li et al., 2026).

Our own research on Instagram found three different ways to endorse airlines. The first option is for an airline's logo to be shown in photo or video feeds (Figure 2, left). The second option is to create entire videos about specific services offered by airlines (Figure 2, middle). The third option is to take flights that are paid for by an airline. Travel influencers then use the opportunity to document the trip and showcase the airline's special services and benefits (Figure 2, right).

Figure 2: Three different ways of airline marketing on Instagram: Product placement (left), standalone post discussing airline services (middle), sponsored trip (right)



Source: Authors' screenshots of the original Instagram posts, 2026. This figure is used for the purpose of scholarly criticism. It is excluded from the Creative Commons licence. Rights remain with the respective copyright holder.

Prices for content on social media

The content, duration, and the influencer's reach determine the price of the advertising. Instagram distinguishes between a Story, Photo feed post and 'Reel'. Influencers using Instagram as a platform monetise their activities based on these three categories.[1]

[1] A Story is a photo or video that disappears after 24 hours (unless the follower saves it). Stories appear at the top of the Instagram app. A Photo feed post on Instagram is a photo (or multiple photos) that the (travel) influencer publishes to their main Instagram profile grid. These posts remain on their profile until they delete or archive them. A Reel is a short-form vertical video. Reels can appear in the main feed of a follower indefinitely. They are designed for discovery and can therefore surface in the Reels tab, Explore page, or even the main feed of non-followers. However, their visibility in these discovery surfaces is not permanent, as Instagram's algorithm prioritises recent, engaging, or trending content.

Table 4 presents the prices listed by influencers on the Collabstr platform in July 2026 for travel-related marketing on Instagram. Prices for other social media platforms are very similar. The platform Collabstr functions as a marketplace where businesses hire influencers for paid promotions. The ranges provided in the table were found as we browsed through the individual offers. The average was provided by the platform itself (Collabstr, 2026).

Table 4: Creator prices for travel-related contents on Instagram, 2026

Category Follower count	Nano 1,000- 9,999	Micro 10,000- 99,999	Mid-tier 100k- 499,999	Macro and mega 500,000+
Story	$50-75	$100-300	$300-600	$500-2,000
Photo Feed Post	$70-150	$300-1,000	$500-1,500	$700-3,000
Reel	$100-250	$600-1,500	$1,000-3,000	$1,000-4,000
Package discounts				Mainly 5% if offered
Average				$350

Source: Own investigation on Collabstr, 2026

A preliminary observation based on browsing the Collabstr platform suggests that travel influencer pricing varies by the influencers' residence. Influencers based in South Asia (e.g., India) and Southeast Asia (e.g., Indonesia) appear to charge lower rates for feed posts and bundled packages than those based in North America, Europe, and the Middle East. These differences may reflect variations in cost of living, purchasing power, and brands' regional marketing budgets. Another observation is that travel influencers appear to charge relatively moderate hourly rates for their work, even when they have a large following.

In addition, influencers receive not only monetary compensation but also frequently gain access to brands' products and services free of charge. For example, airlines may offer influencers seats on flights that would otherwise remain unsold in exchange for mentions or promotional content shared with their audiences. As a travel influencer reports in an interview: "For domestic trips, I can now basically travel without any expenses. However, for international trips, it's the same as it is for regular people. If there's no invitation from brands, scenic spots, or national tourism boards, then I travel like everyone else. I might save more money than some people because I do thorough planning and have access to more industry resources when buying tickets and making arrangements" (Li et al., 2026).

From an influencer's perspective, there appears to be a trade-off between monetisation of their popularity and remaining a neutral market expert. First, too much sponsored content can undermine an influencer's credibility. A recent study analysed 1,143 tourism-related posts, collected from the official accounts of eight Spanish travel influencers on Instagram and TikTok during March–July 2025. 415 publications (36.3%) featured some form of brand presence, either through mentions, visual displays or tagging of tourism-related brands (Fernández-Blanco et al., 2026). Another analysis from June 2022 to June 2023 of the 20 most-followed French travel influencers found that an average of 46% of posts were sponsored (Bazin & Cousin, 2023). Second, not all sponsored content is labelled with hashtags to integrate it seemingly organically into the content. In the former analysis, only 72 posts (6.3%) included explicit disclosure hashtags like #ad or #sponsored, revealing a gap between brand presence and transparency (Fernández-Blanco et al., 2026).

Destinations and transport modes

In our sample of 25 travel influencers, we tracked 722 trips. Of these, 391 (54%) were taken via commercial flights, while five trips (1%) involved private jets. On average, this amounts to more than 16 flights per travel influencer in 2025. Figure 3 maps all 391 commercial flights.

Figure 3: Flights undertaken by sample of 25 travel influencers in 2025 (N=391)



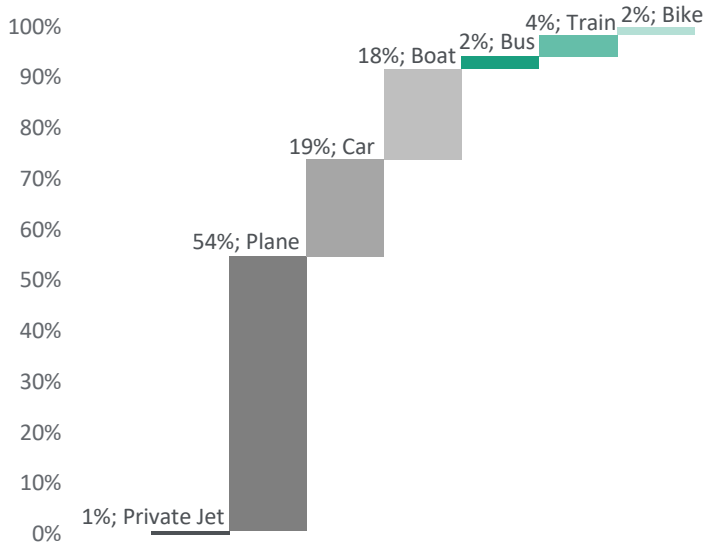
Source: Own research T3

The map (Figure 3) illustrates that most flights are long-haul. The main route undertaken was between London and Istanbul, which is approximately 2,500 km or medium haul. Further information about the distances can be found in the section on the environmental footprint below.

Based on the 25 influencers' highlights on Instagram, we also identified trips by car/van, bus, boat/ship, train/underground, and bike. Figure 4 provides a breakdown of the transport modes used in the sample. Note that it was hardly possible to distinguish between trips aimed at reaching a new holiday destination and those intended to explore a specific holiday destination more thoroughly. For example, out of 129 trips by boat/ship, we counted 11 cruises lasting three up to eleven days. These cruises are both a way to reach a new holiday destination and a means to spend your holidays. However, the plane appeared to be the default transport option to reach a new holiday destination in our sample.

One of the trips was bound for a travel influencer summit, which took place in Malta, sponsored by the Malta Tourism Authority. According to reports, around 30 travel influencers from 17 countries attended. All in all, our sample is a group of hypermobile people.

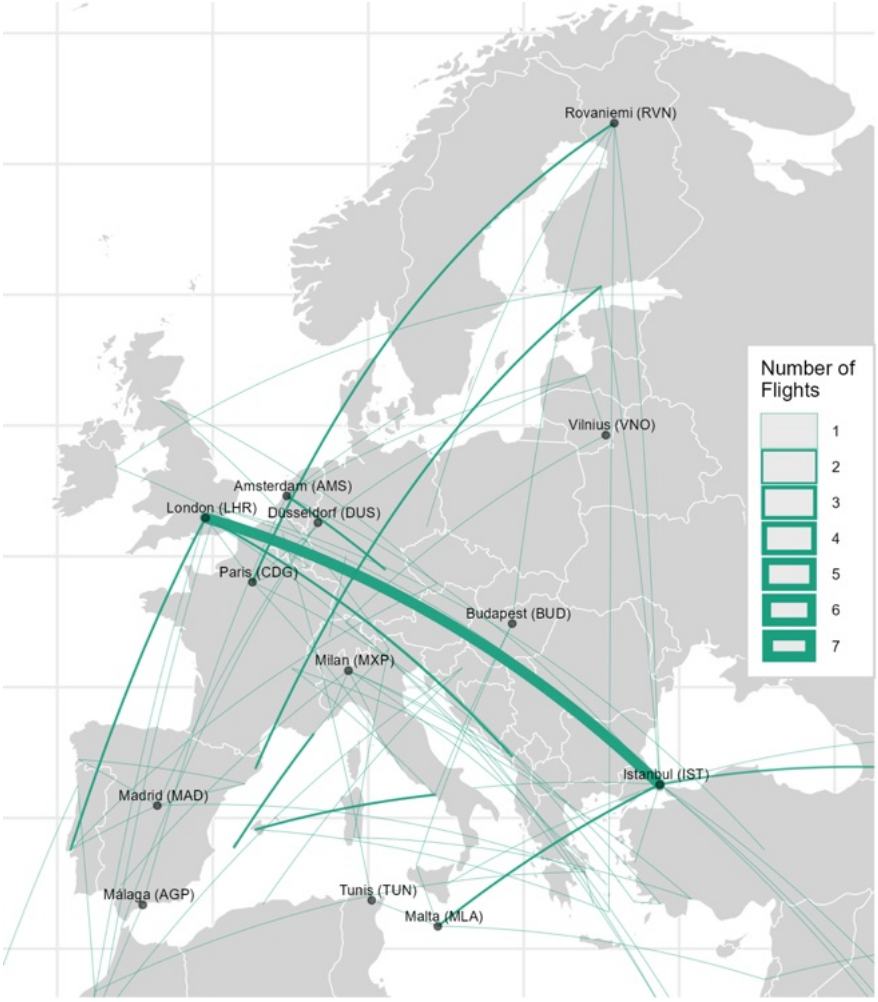
Figure 4: Modal Split of 25 travel influencers in 2025 (N=722 trips)



Source: Own research T3

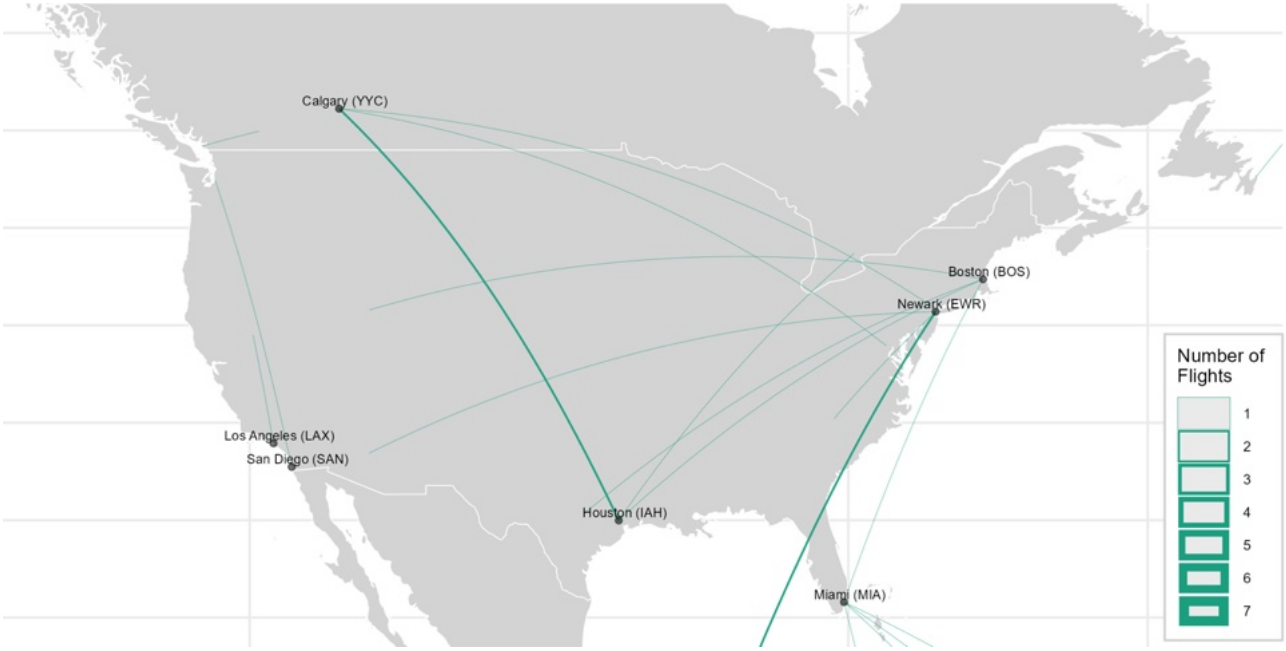
The following two maps show all the short- and medium-haul flights taken by the sample of 25 travel influencers in Europe (Figure 5) and North America (Figure 6). These two maps are zoomed-in views of the world map (Figure 3).

Figure 5: Short- and medium-haul flights by sample of 25 travel influencers in Europe, 2025



Source: Own research T3

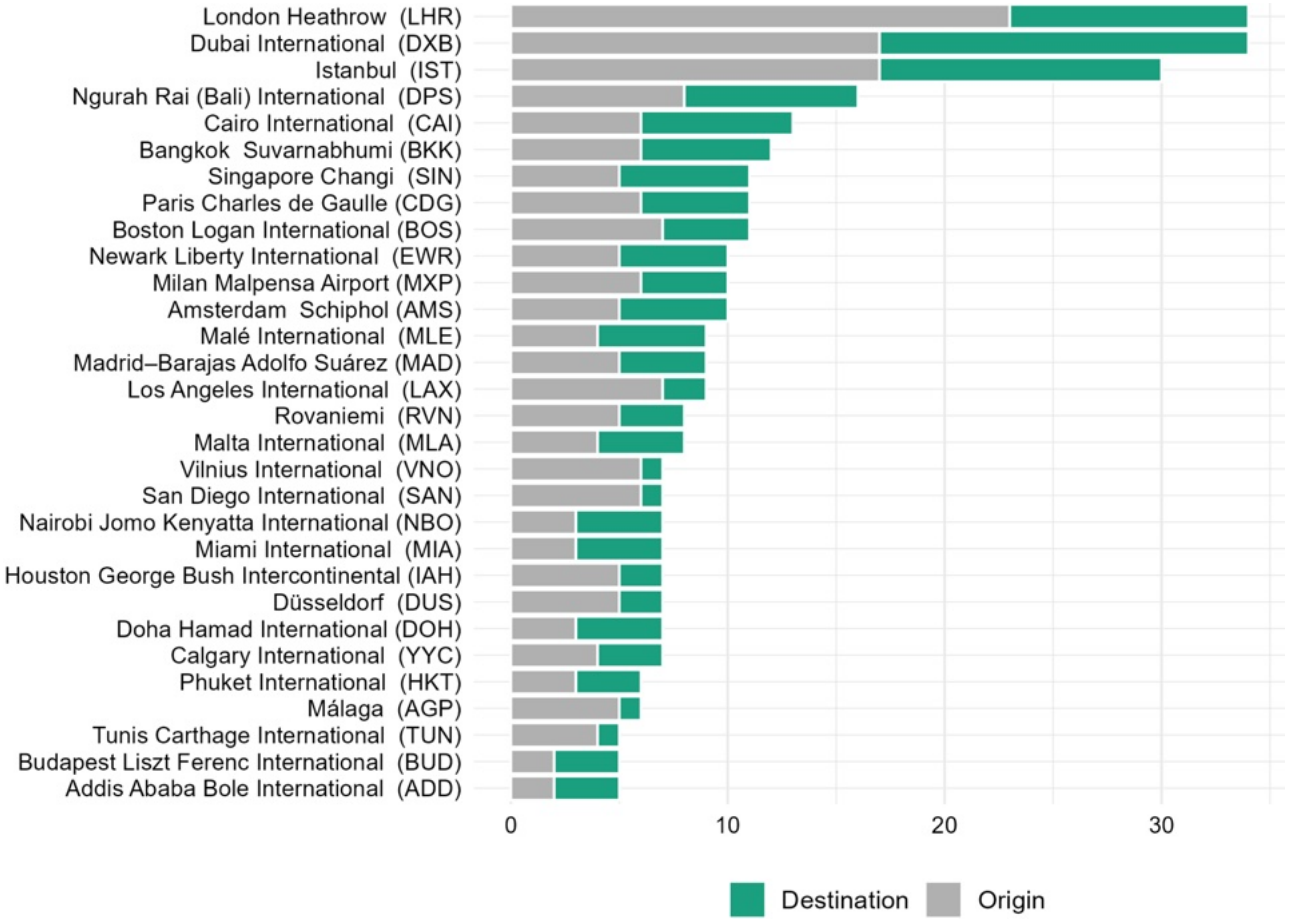
Figure 6: Short- and medium-haul flights by sample of 25 travel influencers in Europe, 2025



Source: Own research T3

Figure 7 shows the top 30 airports flown to or from by the sample of 25 travel influencers in 2025.

Figure 7: Top 30 airports flown to or from by sample of 25 travel influencers, 2025



Source: Own research T3

The pattern in Figure 7 is clear: global hubs lead the list, with London, Dubai, and Istanbul among the most prominent airports. Other global hubs also rank in the top 30, including Singapore, Amsterdam, and Houston, while others are major tourist destinations, such as Málaga, Malé, and Phuket. In the sample of 25 travel influencers, some airports serve not only as destinations but also as gateways to the surrounding region. For example, influencers flew to Bangkok, visited the city, and then travelled southwards to Phuket. This pattern is particularly evident for Bali, Bangkok, and Cairo.

These findings align with research identifying urban cities as hubs for travel influencers, with global cities such as London, Paris, New York City, Dubai, Los Angeles, Istanbul, and Bangkok serving as central hubs for travel production and transit (Femenia-Serra et al., 2026).

Methodologically, it was not possible to track flights with several legs, so Figure 7 shows only the travellers' destinations. Interestingly, many airports on the list frequently serve as stopovers for long-haul trips. It can be assumed that travel influencers, unlike ordinary tourists, use such stopovers to add further content to their stories: rather than merely passing through on multi-leg journeys, they probably treat every stop as a business opportunity — although, given the methodological limits described above, this remains an assumption rather than a finding.

Finally, the list of major airports is also determined by the sample: One of the 25 selected travel influencers is based in Rovaniemi, Finland. While Finnish Lapland certainly is an interesting destination for travel influencers, it would not belong to the list otherwise.

Visual language and imagery

From the analysis of posts by 250 travel influencers in 2025, we first observed two broad account structures. The most common consisted of individual creators documenting solo or independently organised travel. Another recurring structure, however less frequently, consists of partner- or family-based accounts, including traveling around honeymoon or kid-friendly travel content.

The photos displayed focus on the beauty of the locations rather than their unattractive sides. The subjects are special places, such as landscapes, unique wildlife, local architecture, or famous landmarks. In addition, image editing is used to highlight colours and vacation scenes (see Figure 8). The photos may include crowded places which are designed to accommodate large numbers of people such as the Times Square in New York, but no photos would suggest the visit might be unpleasant due to the crowds of tourists.

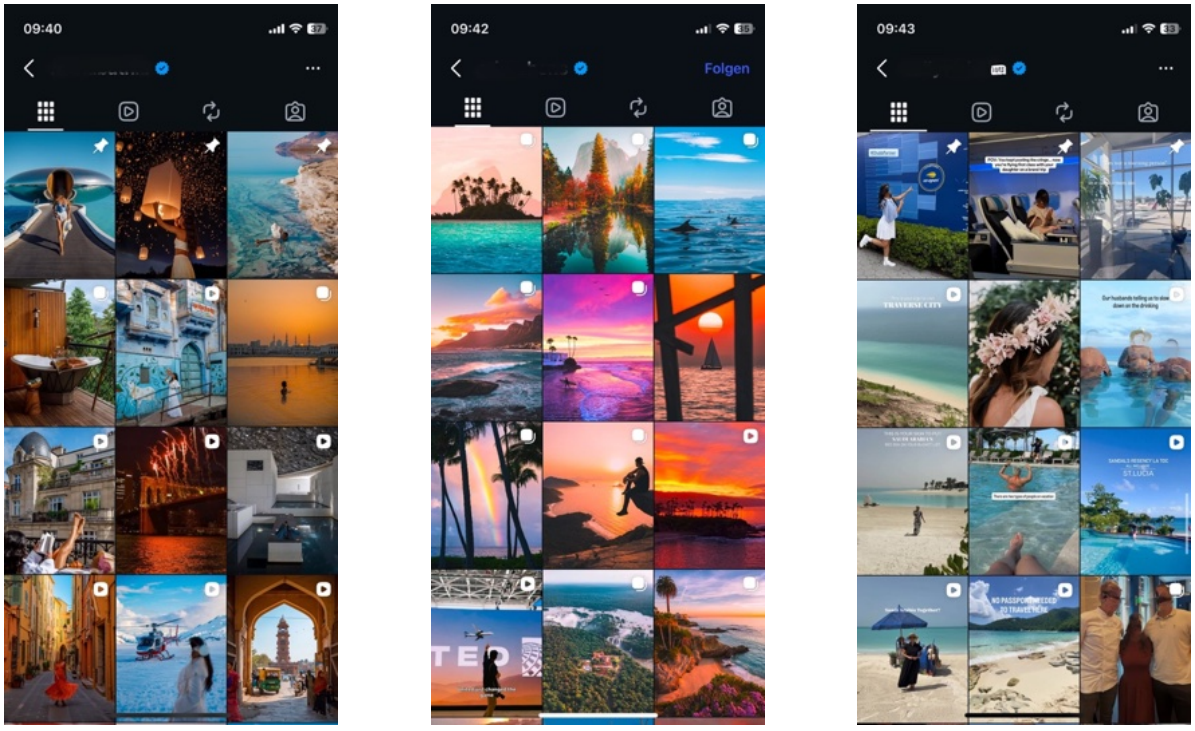
Many travel influencers post content from and about far-off destinations. Travel influencers also tend to advertise luxury. While luxury is a recurring theme, many travel influencers also showcase amenities, comfort and indulgence for vacationers traveling on a tight budget.

When influencers travel to rather far-off places with small airports, then their trips are more likely to be sponsored by regional airlines that serve those places. On some trips, influencers explicitly highlight the high level of (perceived) safety at their destinations. This is especially true for destinations where there might be concerns that a vacation there could be unsafe.

Many influencers specialise in a niche, such as luxury travel or affordable travel, traveling in a van or by train, adventure travel, or traveling as LGBTQ+ person. A further subgroup of travel influencers offers retreats as part of their professional activity, including wellness retreats or trips that are less commonly associated with mainstream tourism. Through their content, influencers offer their followers the opportunity to replicate a similar journey.

Figure 8 shows examples of the post overviews from three travel influencers.

Figure 8: Screenshots of travel influencer posts overview at Instagram



Source: Authors' screenshots of the original Instagram posts, 2026. This figure is used for the purpose of scholarly criticism. It is excluded from the Creative Commons licence. Rights remain with the respective copyright holder.

In conclusion, travel influencers select their destinations based on the following criteria (see also Femenia-Serra et al., 2026):

- Aesthetic appeal: Travel influencers favour photogenic destinations that include palms and turquoise waters, snow-covered peaks and glaciers, or desert dunes.
- Exclusivity and remote areas: There is high interest in remote islands and restricted regions, and unusual destinations that require special permits.
- Global hubs: Major urban centres such as London, Paris, NYC, Dubai, and Los Angeles are a major part of the influencers‘ bucket lists.

Influence on followers and other social media users

Social comparison, envy and anxiety frequently emerge when social media users encounter posts that portray others' achievements, lifestyles, or experiences in a highly favourable or idealised manner, leading them to perceive themselves as comparatively less successful, attractive, or fulfilled (Kirkpatrick & Lee, 2022). Travel experiences, especially those showcased through visually compelling photos, are a prime subject of social media boasting (Deng & Liu, 2021). Social media content does more than induce travel envy, it boosts the profile visitors’ and followers’ intentions to visit respective destinations (Hajli et al., 2018). Instagram plays a key role in tourism promotion, as the desire to capture moments at "Instagrammable" destinations has led to a rise in visitor numbers (Siegel et al., 2023).

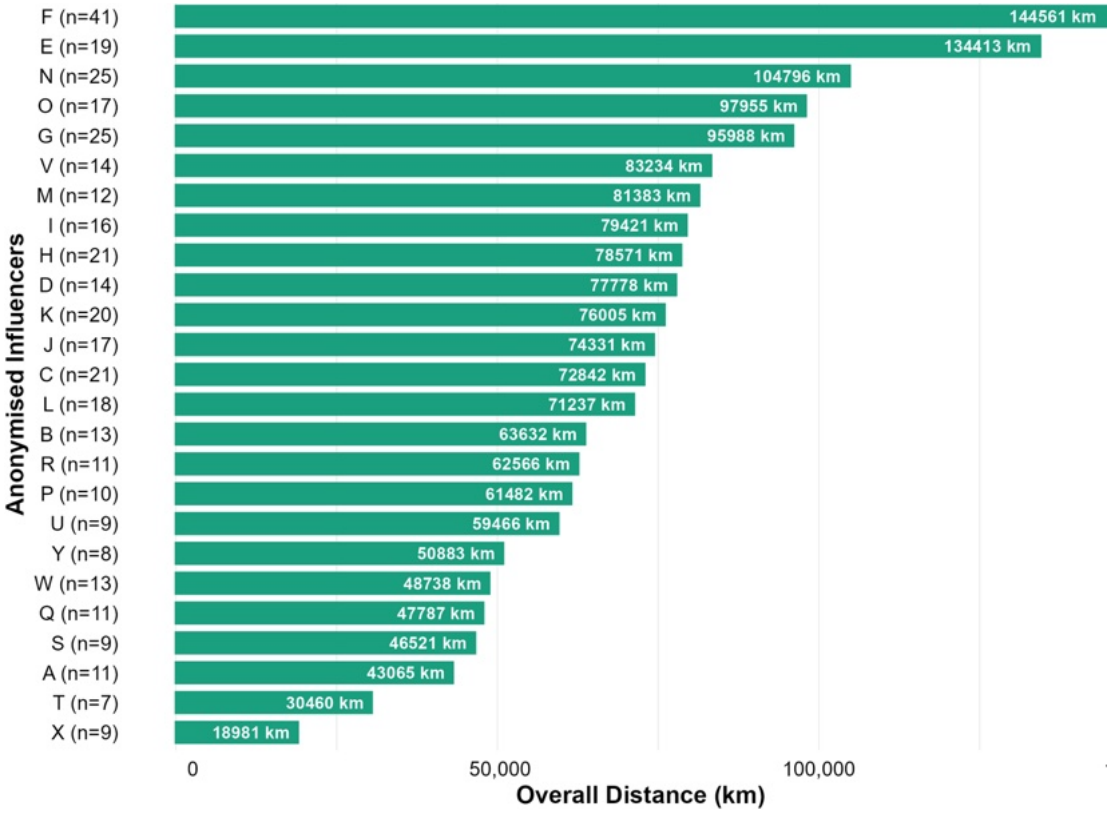
Research findings show that influencers' posts exert a significant influence. Specifically, viewers exhibited increased levels of benign envy and a greater intention to visit when viewing influencers' posts about iconic landmarks. Individuals with high fear of missing out showed a heightened intention to visit when seeing peers’ posts about heritage landmarks (Kim & Kim, 2024).

In addition, travel influencers’ endorsements can impact consumers across all three stages of the decision-making process for choosing a destination, namely pre-decision (initial awareness), decision itself (informative and persuasive content), and post-decision (followers emulate travel influencers by sharing own experiences) (Pourazad et al., 2025).

Environmental footprint

The in-depth analysis of 25 travel influencers' flight profiles reveals long-distance travel, resulting in high climate impact. The average distance covered per influencer from commercial aviation alone (N=391) was as high as 72,244 km in 2025. The range of annual distances travelled by the travel influencers varies significantly. The influencer with the most flight kilometres (F) accumulated 144,561 km on 41 trips, while the one who flew the least (X) recorded 18,981 km by the end of 2025 (Figure 9).

Figure 9: Flight distances covered by travel influencers (N=391 flights in 2025)



Source: Own research T3

The 25 influencers took 391 commercial flights in 2025, which equals almost 16 per person on average. The average flight distance was 4,619 km, which qualifies as a long-haul trip. Together, the influencers flew 1.8 million km in 2025, equivalent to approximately 45 trips around the globe. We only accounted for flights which we could deduct from the Instagram highlights (see methodology in Chapter 1). In that regard, the list of 391 flights with commercial aviation is a conservative number. In addition, Figure 9 does not include other modes of transport used. It also excludes the five private jet flights undertaken (see section on destinations and modes of transport for a modal split).

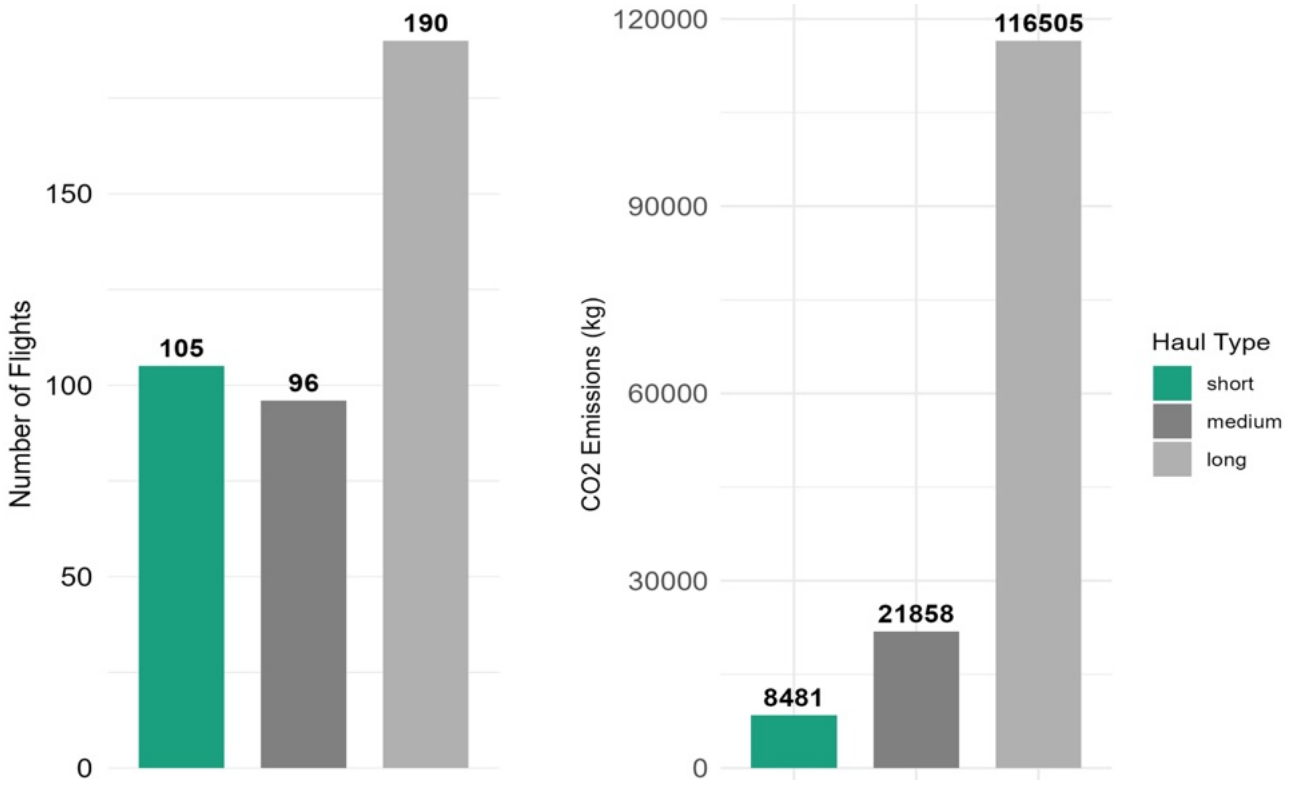
Even though the approach being used is deliberately conservative, the overview shows that the number of trips is very high and the distances involved are very large. For comparison: European tourists take an average of four leisure trips (round trips) per year, with 95% of tourism trips by EU residents being domestic or to another EU country. This yields approximately 0.6 t CO_2e per tourist per year for travel transport within the EU (Laroche et al., 2023).

When the 391 flights are divided into short-haul, medium-haul, and long-haul, 190 (49%) of them fall into the long-haul category. Figure 10 shows the number of flights per distance category short-haul, medium-haul, and long-haul flights (left hand side). Annex D shows the individual flight routes per influencer on maps.

Since long distances dominate the dataset, the 25 influencers' climate impact from these trips is correspondingly high. In total, the 391 flights were responsible for 146.8 tons of CO_2 emissions. 79% (116.5

tons) were emitted because of long-haul flights (Figure 10, right hand side). Applying a factor of 1.7 to account for the non-CO_2 climate effects results in 249.6 t CO_2e for all flights (10.0 t CO_2e per influencer).

Figure 10: Distribution of flight distances and CO_2 emissions per distance category (N=391 flights in 2025)



Source: Own research T3

Among the 25 influencers, five are couples, so we counted each of their flights twice. We also accounted for the one first class, three business class and three premium economy class flights we could record. There are disparities in the climate impact of aviation depending on travel class. On long-haul flights, first class and business class passengers emit up to five times more CO_2 per person than those in economy class. The travel influencer with the highest emissions was N, with 16.3 tons emitted from flights in 2025 (27.7 t CO_2e). X was responsible for the lowest flight emissions, at 1.5 tons (2.6 t CO_2e). However, their climate impact is even higher considering the further trips, which included five private jet trips and eleven cruises, amongst others. For comparison: Emissions of 7.1 t CO_2e per capita were attributable to EU citizens in 2025 (EDGAR database; Crippa et al., 2026). Our sample of travel influencers well exceeded this value through commercial aviation alone (10.0 t CO_2e per influencer). [2]

Importantly, the data also shows that travel influencers have the possibility to minimise negative environmental and social impacts. We recorded eight van trips, 17 bus trips, and eleven trips by bike. These modes of transport typically cause less environmental harm than aviation or cruise travel per passenger km. The sample of 25 influencers did not include any ethical travel influencers. The broader search indicated that such content creators do exist.

[2] Greenhouse gas emissions from flying are highly unequal. A study using household data from the UK finds that across all households in the UK (often consisting of more than one person), average air travel emissions per year are around 2.0 tonnes of CO_2e, but these figures are considerably higher for households that fly and lower for households that do not fly (Büchs & Mattioli, 2022).

Personal background and motivation

Based on academic literature, the motivation to become a travel influencer is a complex mix of personal passion, professional ambition, and social connection (Rodríguez & Sixto García, 2022; Saini et al., 2023; Bastrygina et al., 2024; Arya et al., 2025; Javed et al., 2025):

- Intrinsic and personal motivations: Many start out of a passion for travel and a desire for creative freedom and self-expression.
- Sharing experiences: A core motivation of travel influencers is built on sharing personal experiences and interpretations of those experiences. Documenting journeys to share the world's beauty and inspiring others to embark on similar trips are core drivers.
- Social motivations: A major theme is the desire to build and lead a community. Influencers often feel a duty and pride to provide valuable information, answer follower questions, and advocate for specific causes like sustainable travel or cultural diversity. Many influencers engage on social media with the specific intentions of gaining recognition and exercising influence over others.
- Professionalisation and rewards: Travel influencers are motivated by direct remunerations and the ability to act as location agents who establish a destination's image for a global audience. Many trips are dictated by invitations from tourism boards or brands, allowing influencers to access industry resources and travel without high personal expenses while expanding their personal brand value.

A group of travel influencers operates globally, traveling not just within their home continent (Kirilenko et al., 2024; Luo et al., 2026). However, residence also affects the target audience, which may lead them to focus on (regional) destinations that resonate with their specific national audience (Băltescu & Untaru, 2025; Li et al., 2026).

Our own analysis of 425 travel influencers reveals that the majority are based in Europe or North America (334 individuals and couples or 79%; see Figure 1 in Chapter 1). In our sample of 25 travel influencers which we randomly selected for an in-depth analysis of travel patterns, twelve travel influencers and influencer couples are from Europe, nine from America (84%). The European majority probably partly explains why most short and medium haul flights of our sample of 25 influencers take place on the European continent.

3) AIRLINE ADVERTISEMENT BUDGETS

Similar to travel influencers, there is extensive evidence in academic studies confirming that airlines wield significant influence over consumer choice and help shape the global imagery of travel. To stand out in a competitive market, airlines employ a multi-channel, mainly digital marketing strategy (Simarmata et al., 2024).

The airlines' imagery of air travel evolved before digital channels became popular. Using 2005 data, Small et al. (2008) examine how in-flight magazine advertisements from Qantas and Air New Zealand construct, reinforce, and mediate discourses around air travel. The authors analyse the visual and textual content of advertisements to uncover the ideological messages embedded in airline marketing. The results show that advertisements overwhelmingly appeal to a mobility-rich, financially wealthy, and time-affluent traveller who can afford luxury products, exclusive experiences, and high-end services. Luxury goods and high-status experiences are promoted (Small et al., 2008). Despite the digital shift, print remains vital for building a prestigious corporate image, particularly for luxury carriers like Air France (Hu & Luo, 2016) — suggesting continuity in airlines' luxury-oriented imagery even as channels change.

Social media is currently considered the most critical tool for direct customer engagement and ticket purchase. They are used by airlines to build brand awareness, manage reputation, and foster loyalty by creating emotional connections (Paethrangsi et al., 2023; Simarmata et al., 2024). Luxury still plays an important role in destination branding and airline marketing (Kim et al., 2019; Keke, 2024). Airlines may even intentionally shape travel imaginaries, associating flying with prestige, escape, and exclusivity in order to appeal to affluent, mobile consumers (Bazin & Cousin, 2023). Low-cost carriers primarily target younger generations. These groups value authenticity, trendiness, and "travel hacks" for budget-friendly adventures (Femenia-Serra & Gretzel, 2020). For low-cost carriers, value for money is the most important determining factor in recommendation status and rating scoring on airlines review websites (Pınarbaşı & Zeybek, 2025).

Overall marketing budgets

Airlines do not separately disclose marketing and advertising expenses in their annual reports. Instead, they report them as part of a broader operating expense category. At least five major airlines (American Airlines, 2026; Delta, 2026; Lufthansa, 2026; EasyJet, 2026; Ryanair, 2026) explicitly disclose "Other operating expenses" or equivalent categories in their annual reports, which typically includes marketing, sales and other miscellaneous operating costs. According to a benchmark report, marketing budgets generally account for around 3% of total revenue, though premium carriers may allocate up to 7% (Bird Marketing, 2025).

Several studies explicitly state that digital marketing channels have become more important or effective than traditional channels for the airline industry (Keke, 2024; Arya et al., 2025; Bălțescu & Untaru, 2025). According to MNTN, a company specialising in connected TV (CTV) advertising, 78.4% of airlines' advertising expenditure in 2024 was allocated to digital channels (MNTN Research, 2026).

Digital advertisement channels are online advertisement, social media, search engine placement, CTV, and retail media. Traditional channels are print, cinema, TV, radio, and out of home.

Visibility generated by content creators and social media users

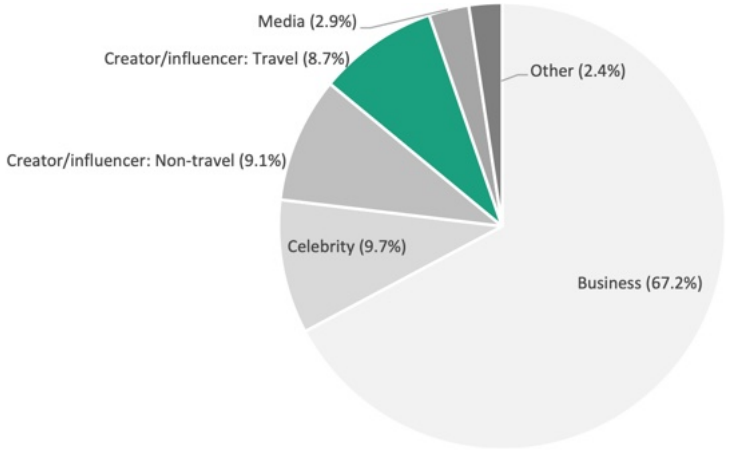
According to influencer marketing platforms, airlines have consistently increased their social media and particularly Instagram presence year over year. Especially globally active airlines are increasingly using influencer marketing to boost visibility and brand awareness. Posts often showcase the first-class flying experience of various airlines (Lefty, 2024). Influencer collaborations significantly enhance social media

performance (visibility, reach, engagement) and, in consequence, Earned Media Value (EMV) in the tourism industry, including the airline industry (Rodríguez & Sixto García, 2022; Lefty, 2024).

Celebrities, media profiles, influencers and business profiles all mention and use airlines in their social media contents. Globally active airlines invest in athletes and athletics by sponsoring teams and tournaments to increase their social media visibility and engagement. These collaborations thrive due to athletes' extensive social media followings (Bazin & Cousin, 2023; Simarmata et al., 2024; Lefty, 2024).[3]

Table 5 displays the visibility of global airlines on Instagram in 2023 as measured in EMV. It shows that travel influencers, amongst others, play a pivotal role in the airlines' efforts to increase social media visibility. 8.7% of visibility is generated by travel influencers (green field in Table 5). The business category has the biggest share of airlines' EMV on Instagram, which can partly be attributed to the inclusion of football clubs (Lefty, 2024).

Table 5: Visibility of global airlines on Instagram, 2023

Top 10 airlines by Earned Media Value (EMV)	Airlines top type of profiles activated
1) Emirates Airlines: $123 million	
2) Qatar Airways: $106 million	
3) Turkish Airlines: $47 million	
4) Etihad Airways: $36 million	
5) Air France: $8 million	
6) Singapore Airlines: $7 million	
7) British Airways: $6 million	
8) Cathay Pacific: $4 million	
9) All Nippon Airways: $4 million	
10) Virgin Atlantic: $4 million	

Source: Lefty, 2024

Table 5 also shows that the EMV of each of the ten airlines, which is generated by various social media profiles, amounts to several million US Dollar worldwide, and in two cases even exceeds the $100 million mark. The combined EMV of the ten listed airlines was as high as $345 million in 2023. The EMV generated by travel influencers corresponds to $30 million (8.7%) on Instagram worldwide, as calculated by Lefty (2024). Although difficult to monetise, these figures demonstrate that engagement with social media content, through likes, comments, shares, and saves, generates significant marketing value beyond that achieved through companies' own advertising expenditure on digital media channels.

Commercials on social media

Beyond organic mentions and appearances on social media, airlines can also purchase advertisements on these platforms. Unlike EMV, which estimates the monetary value of user-generated content, paid advertising involves direct expenditure. Platform algorithms target users based on their interests and content consumption, increasing the likelihood that airline ads appear alongside travel- and vacation-related content.

[3] The European Commission's Digital Services Act (DSA) affects influencers through transparency and accountability requirements for platforms and traders. Influencers must provide identifiable information and clearly disclose sponsored content, as also required under consumer protection laws and the Audiovisual Media Services Directive (AVMSD).

Table 6 (page 25) lists the 25 airlines with the highest social media advertisement expenditures in each of the five European countries France, Germany, Netherlands, Spain, and the UK in 2025. Table 7 (page 26) lists the top 30 airlines by ad spend in the two digital channels social media and internet as the sum of the five countries France, Germany, Netherlands, Spain and UK in 2025.

As described in Chapter 1, the sum is derived from Nielsen's panel-based monitoring of social media platforms, including Facebook, X, and Instagram. Based on the estimated impression volume, Nielsen extrapolates advertising expenditure estimates using multi-source data validation and interpolation techniques (see Annex B). Airlines do not currently disclose these figures individually.

Nielsen provided the top 25 airlines per country defined by ad spend. In three cases, less than 25 airlines were found to advertise on Nielsen's monitored social media channels (France, Netherlands, Spain, see Table 6). This means that the 25 brands with the highest social media advertising spending also account for nearly all the advertising spending by airlines in each country.

The following observations can be drawn from Table 6:

Advertising spending varies widely. The total amount spent by airlines differs in scale in each of the five European countries. In addition, the mix of airlines varies significantly in each of the five countries. The airlines that appear multiple times on the lists—that is, those that run ads on social media in several countries—also differ.

Patterns remain difficult to discern. Neither calculating advertising expenditure per capita nor per social media user eliminates the substantial variation in ad spending across the five countries. When adjusted for the number of social media users in each country (DataReportal, 2026), spending ranges from €0.07 per user in Spain (the lowest figure) to €0.90 in the UK (the highest figure, converted from British pounds).

What is clear, however, is that the list is dominated by airlines that are headquartered in the respective country and, to be more precise, those that hold the most slots at the major international airports in each country. In addition, there are airlines that serve specific regional routes determined by the country's location. For example, you can fly from mainland Spain to the Canary Islands, and certain (Spanish) airlines specialise in this route.

Larger airlines, as measured by market capitalisation, seem to tend to spend more money than smaller companies. However, this pattern is vague. The lists for the five countries seem, rather, to be a compilation of companies with very different advertising strategies.

Finally, €85.8 million represents a substantial amount of expenditure on social media advertising in these five countries. France, Germany, the Netherlands, Spain, and the United Kingdom together account for 58% of the combined GDP of the EU-27, Norway, Switzerland, and the United Kingdom (2025; World Bank, 2026). If airlines allocated their advertising budgets across all 30 European countries in proportion to their respective shares of GDP, total expenditure on social media advertising would amount to €147.0 million.

The following observations can be drawn from Table 7:

The table distinguishes between airlines' advertising expenditures in the five countries across the two channels social media and online. It reveals that spending by individual airlines in these two channels can vary significantly. Expenditure on online advertising likely tends to be structured more toward directly triggering the booking process, whereas social media is used more to generate general awareness and build brand identity (Simarmata et al., 2024).

The list of the top 30 airlines in these two advertising channels further demonstrates that individual companies can employ very different strategies. For example, the low-cost carrier easyJet ranks first, while its direct competitor in this market segment, Ryanair, does not appear at all. Ryanair is ranked 68th.

Table 6: Top 25 airlines by social media ad spend in France, Germany, Netherlands, Spain and UK, 2025

France		Germany		Netherlands		Spain		UK	
Airline	Ad spend (€)	Airline	Ad spend (€)	Airline	Ad spend (€)	Airline	Ad spend (€)	Airline	Ad spend (€)
Air France	2,312,320	Air Baltic	1,304,976	Air Baltic	2,009,595	Iberia	646,768	Easyjet	10,035,619
Qatar	1,866,389	Qatar	1,056,400	KLM	1,048,634	Vueling	360,231	Aer Lingus	6,554,461
Easyjet	1,762,633	Corendon Airlines	869,913	Easyjet	909,599	Plus Ultra	340,311	Air Transat	5,155,804
Transavia Airlines	1,395,921	Easyjet	859,212	Cathay Pacific	550,144	Wizz Air	212,337	Air France	4,296,420
French Bee	1,287,097	Icelandair	580,813	Transavia Airlines	507,326	Fly Level	185,831	Loganair	3,515,074
CCM Airlines	1,075,900	KLM	507,822	Qatar	468,885	Air Europa	184,414	West Jet	3,079,282
Etihad	1,067,062	Condor	502,248	Eurowings	316,150	Qatar	168,108	British Airways	2,142,151
Air Caraibes	990,254	Etihad	473,589	Turkish Airlines	238,289	Easyjet	164,781	Scandi-navian	2,016,174
Air Transat	754,319	Eurowings	466,764	Icelandair	228,446	Avianca	127,756	Saudi Arabian	1,498,309
Air India	580,282	Lufthansa	430,584	Pegasus	147,877	Latam Airlines	112,019	Emirates	1,440,590
Turkish Airlines	555,722	Turkish Airlines	392,483	Cebu Pacific	119,100	KLM	95,327	United Airlines	1,294,156
Corsair	486,752	Finnair	380,386	Malaysia Airlines	115,688	Turkish Airlines	74,377	Latam Airlines	1,247,192
Malaysia Airlines	378,593	Singapor Airlines	343,112	Singapor Airlines	110,048	Air Arabia	69,037	Finnair	1,099,831
Dreamjet	374,565	Cathay Pacific	316,959	Saudi Arabian Airlines	59,277	Air France	29,162	Corendon Airlines	1,003,727
Vueling	104,153	Scandinavian	285,607	Indigo Airlines	57,975	Etihad	28,699	Air India	949,092
Air Arabia	78,061	Air India	228,539	Air India	48,312	Air Baltic	25,755	Singapor Airlines	817,443
Emirates	74,878	Air France	201,494	Etihad	38,582	Binter Canarias	23,944	Cathay Pacific	701,902
Air Austral	46,560	British Airways	137,677	Royal Air Maroc	8,125	Canary Fly	20,498	Malaysia Airlines	692,731
Pegasus	34,518	Iberia	123,319	Kales Airline	2,098	Emirates	14,608	Turkish Airlines	653,541
Qantas	26,719	Latam Airlines	113,513	---		TAP	11,037	Air New Zealand	638,826
Vietnam Airlines	23,444	Swiss Air	110,221	---		Volotea	3,064	Virgin Atlantic	628,049
Air Tahiti Nui	23,075	Aer Lingus	108,269	---		Lufthansa	2,633	Lufthansa	583,788
Air Cote d'Ivoire	992	Oman Air	101,274	---		Ryanair	948	Qantas	288,787
---		Discover Airlines	40,042	---		Iberia Express	49	Jet2,com	184,870
---		Emirates	9,027	---		---		Sunexpress	106,282
Total	€ 15.3M	Total	€ 9.9M	Total	€ 7.0M	Total	€ 2.9M	Total	€ 50.6M

Total advertisement spend (all five countries): € 85.8M

Source: Nielsen, 2026[4]

Table 7: Top 30 airlines by social media and internet ad spend in France, Germany, Netherlands, Spain and UK, 2025

#	Airline	Sum social media and online		Social media		Online	
		Ad spend (€)	# countries represented	Ad spend (€)	# countries represented	Ad spend (€)	# countries represented
1	Easyjet	25,847,590	5	13,731,843	5	12,115,746	5
2	Emirates	11,039,760	5	1,539,103	4	9,500,657	5
3	KLM	10,794,078	3	1,651,783	3	9,142,295	3
4	Air France	8,152,774	4	6,839,396	4	1,313,378	4
5	Aer Lingus	7,519,448	2	6,662,730	2	856,717	1
6	Air Transat	7,088,065	2	5,910,123	2	1,177,942	2
7	Transavia Airlines	5,856,672	2	1,903,246	2	3,953,426	2
8	Saudi Arabian Airlines	5,464,282	2	1,557,586	2	3,906,696	1
9	Vueling	4,875,134	3	464,384	2	4,410,750	3
10	Iberia	4,193,750	2	770,087	2	3,423,663	2
11	French Bee	4,137,183	1	1,287,097	1	2,850,086	1
12	Air Baltic	4,010,897	3	3,340,326	3	670,571	2
13	Qatar	3,714,709	4	3,559,782	4	154,927	3
14	Air Europa	3,650,003	1	184,414	1	3,465,589	1
15	Loganair	3,515,074	1	3,515,074	1	0	0
16	West Jet	3,180,474	1	3,079,282	1	101,192	1
17	British Airways	2,970,732	2	2,279,828	2	690,904	1
18	Turkish Airlines	2,580,771	5	1,914,412	5	666,359	5
19	Eva Airways	2,488,873	1	0	0	2,488,873	1
20	Corendon Airlines	2,436,142	3	1,873,640	2	562,502	3
21	Scandinavian	2,302,236	2	2,301,781	2	454	1
22	Lufthansa	2,272,705	3	1,017,005	3	1,255,699	3
23	Air India	2,028,147	4	1,806,225	4	221,922	4
24	Jet2,com	1,975,188	1	184,870	1	1,790,318	1
25	Etihad	1,888,159	4	1,607,931	4	280,227	4
26	Malaysia Airlines	1,797,865	3	1,187,012	3	610,853	2
27	Finnair	1,706,692	2	1,480,217	2	226,475	2
28	Qantas	1,678,305	2	315,506	2	1,362,799	2
29	Cathay Pacific	1,661,404	3	1,569,005	3	92,398	3
30	Singapore Airlines	1,597,782	3	1,270,604	3	327,179	3
Total ad spend (Top 25 from each of the five countries = 69 airlines)		**€ 163.4M**		**€ 85.8M**		**€ 77.7M**	

Source: Nielsen, 2026[4]

[4]The local currency in the UK, the British pound (GBP), has been converted into euros using the monthly average exchange rates as the conversion factor. For 2025, the average exchange rate was 1.1656 GBP per EUR.

All globally operating airlines with hub airports in Europe or the Middle East are ranked among the top 30 carriers listed in Table 7. Some Asian and Australian airlines are also included, but North American carriers are not. These globally operating (luxury) airlines are also the ones that mainly appeared as sponsors in travel influencer posts. The European regional carriers that appear in Table 7 did so far less frequently. In our analysis of 250 travel influencers, globally operating carriers constituted the majority of sponsors, although we also identified European-based carriers sponsoring content related to European connections. In addition, some regional carriers appeared in specific cases—namely, when a travel influencer visited a remote destination (e.g., an island) served by only a few airlines, one of which was the sponsor.

Figure 11 provides an overview of the 68 airlines in the database that rank among the top 25 by advertising spend on social media and online in at least one of the selected countries: France, Germany, the Netherlands, Spain and the United Kingdom. The airlines are ranked by the number of countries in which they appear in this top 25 spend ranking, ranging from one to five. The figure underpins that only a minority of airlines allocate substantial advertising budgets across multiple countries, primarily global carriers operating major international hubs.

Figure 11: Representation of selected airlines on social media and online in selected countries



Source: Own illustration T3 based on Nielsen, 2026

Annex E presents airline advertising expenditure on search engines and CTV in Germany and the UK (see methodology in Chapter 1). Our data provider, Nielsen, is currently expanding its monitoring capabilities for search engines and CTV and was able to provide preliminary data for Germany and the United Kingdom for Q1 2026. The data indicate that airlines are also allocating significant marketing budgets to these two channels: Multiplying the quarterly figures for the two advertising channels by four to estimate the annual figures, and scaling the GDP of Germany and the UK to Europe, yields a budget of €159 million (according to the preliminary data, which may not be exhaustive).

As a rough estimate based on the available data, airlines may spend approximately €0.5 billion annually on advertising across all digital channels in the EU-27, Norway, Switzerland, and the UK. This estimate is based on the Nielsen data presented in Table 7 and Annex E and extrapolated using the countries' respective GDPs as a scaling factor. It considers that the lists of top 25 airlines are not exhaustive. Social media accounts for 33.5 per cent of the dataset, making it the airlines' largest digital advertising channel by spending.

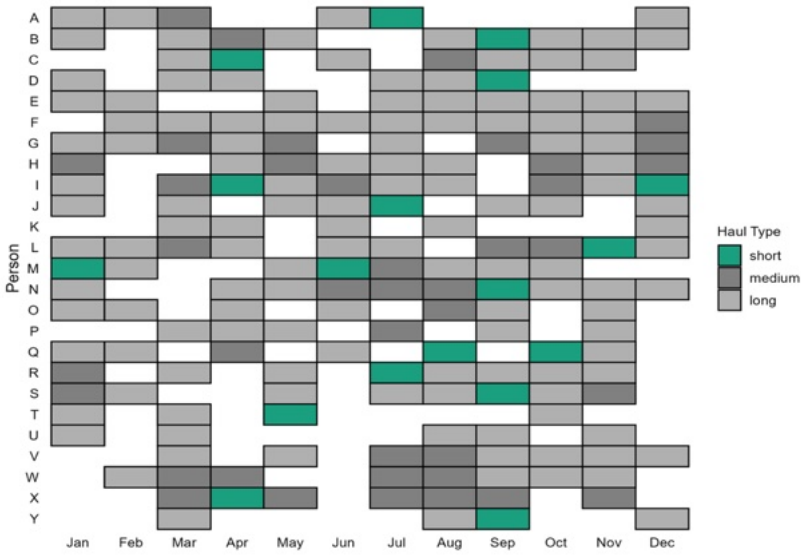
Timing of the commercials vs. timing of social media users' posts

Academic research shows that the search for airline tickets follows a seasonal pattern. Multiple recent studies using airline booking and clickstream data have found recurring peaks in both search and booking activity. The first airline ticket search and booking activity peak occurs in winter (January–March), when travellers primarily book summer holidays (3–6 months in advance), the second late autumn, when bookings surge for winter holiday travel (Fan et al., 2023; Degife & Lin, 2024).

Our in-depth analysis of the 25 travel influencers' flight activities (as posted in their 'Highlights') revealed no seasonal patterns. In Figure 12, we have distributed all 391 identified commercial flights across the months of the year 2025. The graphic also differentiates the distances flown (haul type), with the longest distance flown being displayed in cases where multiple flights occurred within the respective month. No clear patterns emerged indicating that influencers' flights coincided with general booking activity (Figure 12).

This finding suggests that travel influencers and their (potential) sponsors are not primarily aiming to directly trigger a booking process through social media posts. Instead, it supports the insight that airlines use travel influencers to build brand recognition and foster a general desire to travel. While influencing destination choices is also an objective, driving the actual booking process is primarily pursued through other (digital) channels.

Figure 12: Seasonality of influencer flights, 2025 (N=391)



Source: Own research T3

4) FINDINGS AND CONCLUSIONS

Findings

Social media, particularly **travel influencers**, have the capacity to influence tourists' destination decisions and foster travel aspirations among users. The results suggest a potential link between travel influencers' emissions and their followers' travel behaviours, though further research is needed.

The fees for travel influencers are comparable to those of many other professional groups. Advertising companies incur low costs when paying influencers to produce sponsored content. In many cases, travel influencers may only receive free products and services from the tourism industry in exchange for promoting them. They embed sponsored content as organically as possible, since overtly promotional posts undermine both their credibility and the advertisement's reach.

The destinations visited by these influencers are typical places, such as major cities, islands, historical sites, natural wonders, and sports areas. In addition, they favour photogenic destinations with aesthetic appeal, places that stand for exclusivity and remoteness; and global hubs. Luxury and comfort also play a role, making photos or videos more attractive.

The distances travelled by travel influencers are very high. Air travel is the norm, and long-haul flights predominate compared to medium- and short-haul flights. Travel patterns are often global, though there are also influencers whose travels are limited to specific places or continents. In our random sample of 25 travel influencers, each took an average of nearly 16 flights in 2025, resulting in average CO_2e emissions of 10.0 t per influencer from air travel alone. For comparison: European tourists take an average of four leisure (round) trips per year, with 95% of tourism trips by EU residents being domestic or to another EU country. This corresponds to approximately 0.6 t CO_2e per tourist per year from domestic and intra-EU leisure travel by all transport modes (Laroche et al., 2023).

The travel influencers' tips are embedded in stories that feature photogenic locations. Conversely, this reduces the inclusion of certain realities and travel tips, specifically those focused on avoiding unpleasant situations, such as overcrowding or long queues, at the risk of being misleading.

Airlines are increasingly using social media for advertising, and based on the available data, it is likely that they allocate the largest marketing budget to this channel compared to other (digital) channels. Social media is used to build brand image, inspire travel desires, promote destinations, and directly trigger the booking process for vacations. Other digital channels cannot influence potential customers' decision-making processes as comprehensively.

A rough estimate based on the available data (see methodology in Chapter 1) suggests that all airlines combined spent approximately €0.5 billion on advertising across five digital channels—social media, online, search, CTV, and retail media—in the EU-27, Norway, Switzerland, and the UK in 2025. Social media accounted for approximately one third of this spending.

In addition to spending on social media platform ads, airlines particularly leverage celebrities, companies, and travel influencers to conduct marketing on their behalf. This creates significant additional quantifiable marketing value in the form of Earned Media Value. In the case of travel influencers, this approach is particularly cost-effective from the airlines' perspective, as it can generate substantial visibility at relatively low cost.

Regional airlines highlight the routes they operate—like flights from major hubs to remote areas—through collaborations with travel influencers. Global airlines use travel influencers primarily to showcase the general fact that they serve all major destinations, including typical touristic places.

Conclusions

Airlines have recognised that social media is an important channel for marketing. Social media influences the decision-making process of potential travellers by generating a general desire to travel and triggering specific wishes, while also building brand identity. Other channels are not as comprehensive as advertising tools. For example, website ads and search engine advertisements are more likely to trigger the booking process than to determine a tourist's destination choice.

Travel influencers, through their visual storytelling, are particularly effective at promoting comfort, luxury, and dream destinations. This primarily benefits globally operating airlines, which offer premium cabins and serve diverse destinations worldwide. For them, the focus is less on influencing tourists' choices of specific destinations and more on promoting the appeal of distant destinations while highlighting their role in making them accessible through air travel. However, destination selection still plays a role—if a remote island is served by only one or a few airlines, it makes sense for airlines to let travel influencers promote both the airline and the destination.

The power dynamic between airlines and travel influencers is highly unequal. In essence, travel influencers love to travel a lot and, as influencers, can do so more affordably by promoting brands such as airlines. Airlines, in turn, have extensive marketing budgets, a significant portion of which they allocate to social media. The cost of engaging travel influencers is negligible to them—often, free flights are sufficient to secure their collaboration. At the same time, airlines are aware of the influencers' multiplier impact.

For travel influencers, it is a competitive advantage to promote comfort and exclusiveness. Advertising for standard customers is disseminated via websites, CTV, search engines, and social media. Travel influencers are not engaged for this purpose. Luxury and comfort appear to be the unifying marketing themes here. They have long been part of the brand image for global airlines, and travel influencers can effectively showcase them through their visual storytelling. Low-cost carriers can benefit from travel influencers' post by showcasing value for money – comfort for people who cannot afford luxury. In some cases, regional airlines sponsor travel influencers with the aim to make their brand known on specific routes.

Travel influencers must travel to achieve the desired marketing impact. Their power lies in the visuals and symbolism they convey—attractive colours, angles, and iconic, exotic tourist destinations that evoke themes like adventure, relaxation, exclusivity, and more. This creates a toxic mix from an environmental perspective: long-haul travel becomes both affordable and an obligation for influencers, courtesy of the airlines.

The long distances travelled by air result in a correspondingly high climate impact. But travel influencers' preference for far-off (and potentially environmentally fragile) destinations also creates a paradox, because their hypermobile, carbon-intensive lifestyles normalise travel to the very ecosystems most vulnerable to the climate crisis (Femenia-Serra et al., 2026). They often use natural imagery, such as plants and trees, to soften the energy-intensive image of the aviation industry, a practice that can be perceived as greenwashing (Hu & Luo, 2016). Furthermore, by popularising specific photogenic spots, influencers contribute to overtourism and crowding. Notably, environmental concerns are virtually absent from both influencer posts and the comments of their followers (Femenia-Serra et al., 2026).

Finally, literature suggests that individuals morally disengage from the harmfulness of flying due to ad exposure. People tend to neglect negative consequences, seek moral justification or displace responsibility for flying after seeing flight advertising (Stubenvoll & Neureiter, 2021).

Interestingly however, some travel influencers believe that environmentally and socially responsible behaviour, such as respecting local cultures, minimising waste, and encouraging ethical travel practices, has the potential to contribute to the long-term success of tourist destinations (Saini et al., 2024). Promotion of slow travel may be a future-proof strategy for this profession.

If policymakers want to curb the negative environmental impacts of these business practices, they could work on taxation strategies targeting destinations, tourists, airlines, and influencers. In addition, literature

suggests a lack of hashtags disclosing sponsored content (Fernández-Blanco et al., 2026). Policy makers could therefore refine existing legislation to further improve transparency of sponsored content. Finally, platforms could adjust their algorithms to deprioritise or exclude high-emission travel content or promote low-impact travel content. They could also flag misleading exclusivity claims. In light of the growing number of municipal bans on fossil fuel ads, this avenue could also be further explored at local, national and/or European levels.

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GLOSSARY

Commercial flights: Commercial aviation refers to the large-scale, regulated transportation of passengers or cargo by airlines (e.g., Lufthansa, Emirates) using certified aircraft (like Boeing 787s or Airbus A320s) on scheduled routes, with standardised services, public bookings, and strict safety oversight. In contrast, private jets are exclusively used for personal or corporate travel, offering flexibility in routing, access to smaller airports, and customised services. While commercial flights prioritise efficiency and scalability, private jets emphasise privacy, convenience, and exclusivity.

Content creator: A content creator on social media is an individual whose primary function is to produce and distribute original material—such as videos, photographs, written posts, or audio digital platforms. Content creators are not inherently tied to persuasion or commercial influence; their output can be purely artistic, educational, or personal. While the terms content creator and influencer are frequently used interchangeably, they represent distinct but overlapping roles. The primary distinction lies in intent and impact: influencers are defined by their ability to shape the opinions, decisions, or behaviours of their audience, often through persuasive or promotional content, and typically engage in brand partnerships as a central component of their activity. In contrast, content creators may produce material without any commercial or persuasive intent. While all influencers are, by necessity, content creators, not all content creators are influencers.

Earned Media Value (EMV): EMV is a metric used to quantify the monetary value of →organic exposure a brand gains through user-generated content, influencer posts, shares, mentions, etc. It helps understand the equivalent cost brands would have paid for the same visibility if it had been achieved through →sponsored advertising. EMV is calculated based on metrics like reach (number of people who saw the content), engagement (likes, comments, shares, saves), impressions (total views), and sentiment (positive, negative, or neutral mentions).

Ethical travel influencer: An influencer who prioritises responsibility, sustainability, and authenticity in their travel-related content, ensuring that their activities and messaging align with environmental, social, and cultural integrity. This includes minimising environmental harm, supporting local economies, avoiding cultural appropriation, and promoting honest, transparent narratives (including disclosing →sponsored content). A key aspect of ethical travel influencing is the advocacy for sustainable tourism practices, such as encouraging →slow travel, eco-friendly accommodations, and wildlife conservation. They foster a more conscious and mindful approach to travel.

Hypermobility: In the context of travel influencers, hypermobility refers to an extreme or accelerated frequency and intensity of travel, often characterised by rapid, frequent, and sometimes unsustainable movement across multiple destinations. Unlike conventional tourism, which typically involves periodic or planned trips, hypermobility embodies a lifestyle of constant motion, where travel becomes not just an activity but a defining identity—one that is both professionally and personally central to the individual. For travel influencers, hypermobility may become a cornerstone of their brand, as it enables them to produce a steady stream of content from diverse locations, thereby maintaining audience engagement and relevance.

Influencer marketing platforms: These platforms help larger organisations discover influencers, manage relationships, track campaigns across multiple social media platforms, benchmark competitors, and measure performance (reach, impressions). Some platforms automate contracts, invoices, and influencer payments.

Slow Travel: A mindful approach to experiencing destinations that prioritises depth, connection, and sustainability over speed or quantity. It involves staying longer in fewer places, engaging deeply with local cultures, and often choosing slower, more eco-friendly transportation (e.g., trains, bikes, or walking) to foster authentic experiences while minimising environmental impact and personal stress.

Sponsored content: A sponsored post on Instagram is a paid advertisement created by a business or influencer to promote a product, service, or brand. These posts are designed to look like regular content but are explicitly labelled as "Sponsored" or "Paid partnership with [Brand]" to indicate they are part of a marketing campaign. The advertiser can pay Instagram (via Meta Ads Manager) to display the post to a targeted audience. If a post is boosted as an ad, Instagram automatically adds a "Sponsored" label to it. Even if the post is not boosted, platform and legal requirements still apply. It must comply with Instagram's Branded Content Policies and with applicable advertising regulations (e.g., EU disclosure rules). Influencers must disclose partnerships using tags like "#ad" or "#sponsored" if not automatically labelled. Similar mechanisms apply at other social media platforms.

Online advertisement: In the Nielsen Ad Intel context, this refers to paid promotional content delivered over the internet on websites and apps, primarily in display and video formats. It encompasses banners, pop-ups, sponsored links, content placements, microsites, logos, and video ads that are booked either directly with publishers or programmatically via ad exchanges.

Organic advertisement: Refers to content that is created and shared without any material incentive, payment, or control from a brand. The influencer does not receive money, free products, discounts, commissions, or any other form of compensation from a brand for creating or posting the content. There is no contract, verbal agreement, or expectation between the influencer and a brand. The brand does not review, approve, or influence the content (e.g., no script, no mandatory talking points, no required hashtags).

Voluntary endorsements do not need the "Paid partnership" tag (→sponsored content). If the brand retweets, shares, or thanks the influencer after the post, no disclosure is needed unless the brand originally requested or incentivised the post. The distinction between organic and non-organic (→sponsored/paid) content is directly relevant to →Earned Media Value.

Out of home (OOH) advertisement: OOH refers to any form of marketing that reaches consumers when they are outside their homes. This includes traditional and digital formats like billboards (static or digital), transit ads (buses, trains, taxis, subway stations), street furniture (bus shelters, benches, kiosks), airport/shopping mall displays, digital signage (LED screens, interactive kiosks), and ambient ads (projections, guerrilla marketing, or unconventional placements like elevators or gas stations).

Retail media: Advertising sold by a retailer/platform to another brand, that is, ad space for brands that want to reach online shoppers. This could be a consumer goods brand that pays a platform such as Amazon to show a sponsored product when someone types certain keywords, or a brand that buys a display ad on a retailer's website or app.

ANNEX

A) Nielsen Ad Intel International Digital (Display & Video) Methodology 39

B) Nielsen Ad Intel International Paid Social Ad Spend Estimation & Coverage 48

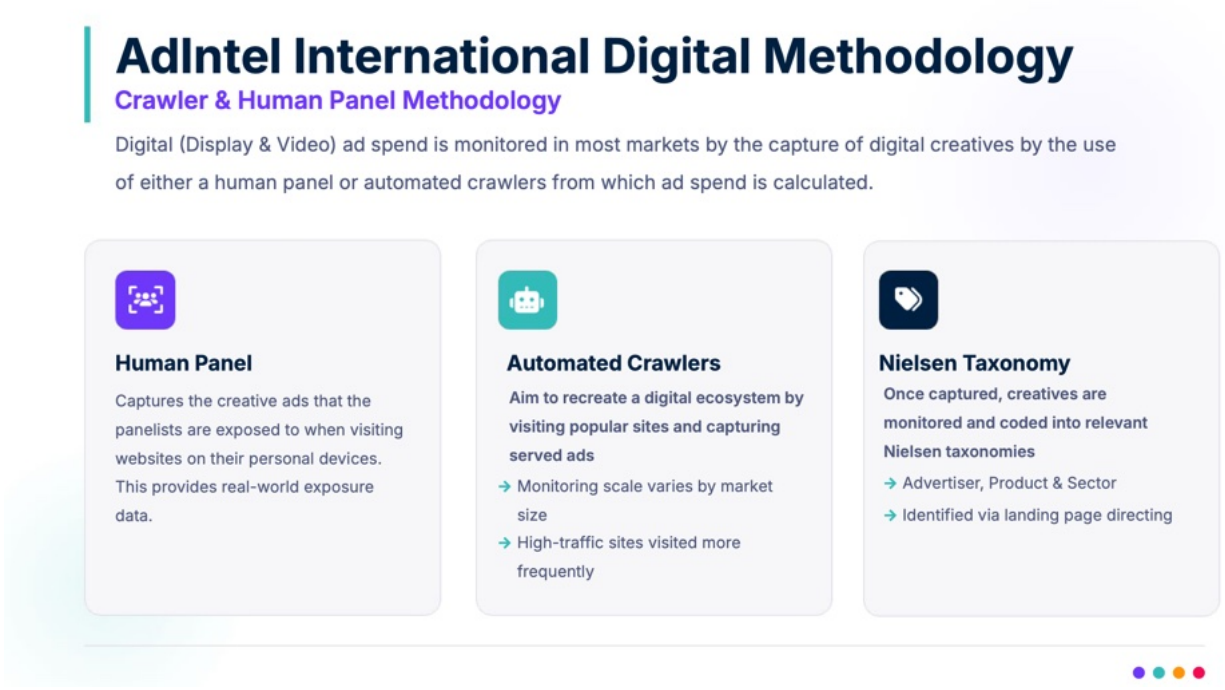
C) List of travel influencers with Instagram profiles and at least 100,000 followers 51

D) Flight routes of the 25 selected travel influencers 61

E) Ad Spend Airlines Q1/2026, CTV and Search 72

Annex A: Nielsen Ad Intel International Digital (Display & Video) Methodology





AdIntel International Digital Methodology

Crawler & Human Panel Creative Capture

Details of the different digital capture methodologies

Human Panel

Millions of panelists globally recruited via proprietary Apps across desktop and mobile devices.

- **Compliance:** Fully GDPR compliant and anonymized data collection.
- **Balanced Profile:** Apps cover e-commerce, entertainment, travel etc to ensure broad demographic representation.
- **Privacy:** Panelists provide explicit consent during onboarding to share activity in exchange for access to premium app versions
- **Hybrid Model:** Data is supplemented with capture from automated crawlers to to provide the most comprehensive service in the market.
  Capture from real user experience is combined with consistent tracking of key websites based on user traffic.

Crawlers

Automated Crawlers visit a set number of websites within each market's digital universe.

- **Market Scope:** Website count varies by country size; constantly reviewed for emerging platforms.
- **Adaptive Frequency:** Higher crawl rates for larger sites and during peak traffic times based on statistical trends.
- **Depth Focus:** 3-Level Site Scanning:
  - Level 1: Home Page
  - Level 2: One click away
  - Level 3: Two clicks away

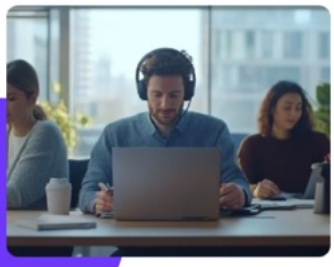
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Paid Social Human Panel

Panel Recruitment & Data Collection:

Paid Social is monitored using a human panel, so spend data provided is based on real ad activity served to our panel. Ads served to the panel are captured, coded into Nielsen's taxonomy and their spend value estimated.

Paid Social data is collected via an opt-in human panel comprising millions of panelists worldwide. The methodology ensures behavioral and demographic characteristics are highly representative of the internet audience in each market.



Recruitment & Compliance

Users sign up via proprietary Apps across desktops and mobiles. All collection is fully GDPR compliant and anonymized.

Diverse Categories

Apps cover e-commerce, security, coupons, fashion, and entertainment to ensure a balanced and broad audience profile.

Opt-in Consent

Panelists provide explicit consent during onboarding to share activity in exchange for access to premium app versions.

Real-time Insights

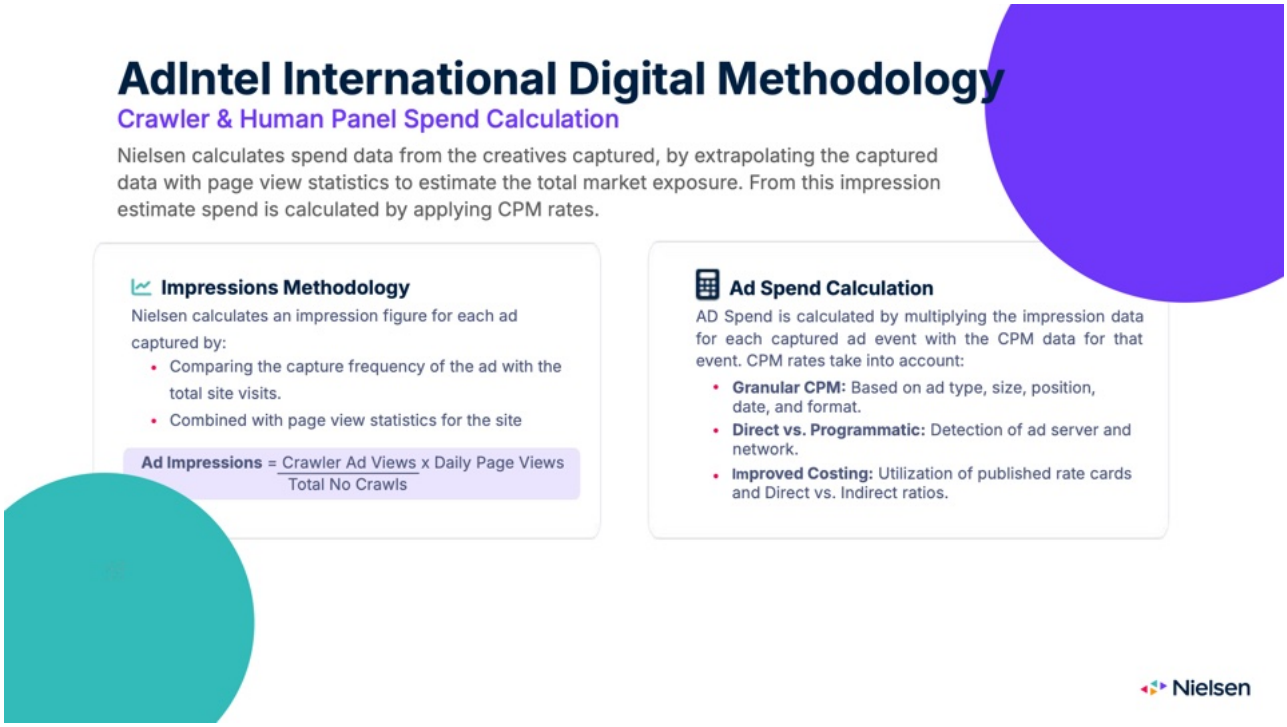
Consented members share online information and advertising served 24/7, providing a real-time viewpoint on digital trends.

VPN-Like Technology

Proprietary technology records all advertising served across all Apps and websites (including Social Media) without requiring exclusive individual permissions per Third Party App.

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Source: Nielsen Customer Success



AdIntel International Digital Coverage

Digital Coverage in Nielsen markets

- Details of the capturing methodology used in each market
- Scope of coverage provided in each market

Country	Methodology	No of Sites	Display	Video	YouTube	Desktop/Mobile	Browser/In-App
Australia	Crawler & Human Panel	1,800	o	o	o	Desktop & Mobile	Browser & In-App
Belgium	Crawler	275	o	o	o	Desktop & Mobile	Browser & In-App
Brazil	Crawler & Human Panel	3,500	o	o	o	Desktop & Mobile	Browser & In-App
Czech Republic	Log Data	240	o	o		Desktop & Mobile	
Denmark	Crawler	250	o	o	o	Desktop & Mobile	Browser only
France	Crawler	450	o	o	o	Desktop & Mobile	Browser only
Germany	Log Data & Crawler	950	o	o	o	Desktop & Mobile	Browser & In-App
Indonesia	Crawler	395	o	o	o	Desktop & Mobile	Browser only
Ireland	Log Data	285	o	o	o	Desktop & Mobile	
Italy	Crawler & Human Panel	595	o	o	o	Desktop & Mobile	Browser & In-App
Malaysia	Crawler	200	o	o	o	Desktop & Mobile	Browser only
Netherlands	Crawler	315	o	o	o	Desktop & Mobile	Browser & In-App

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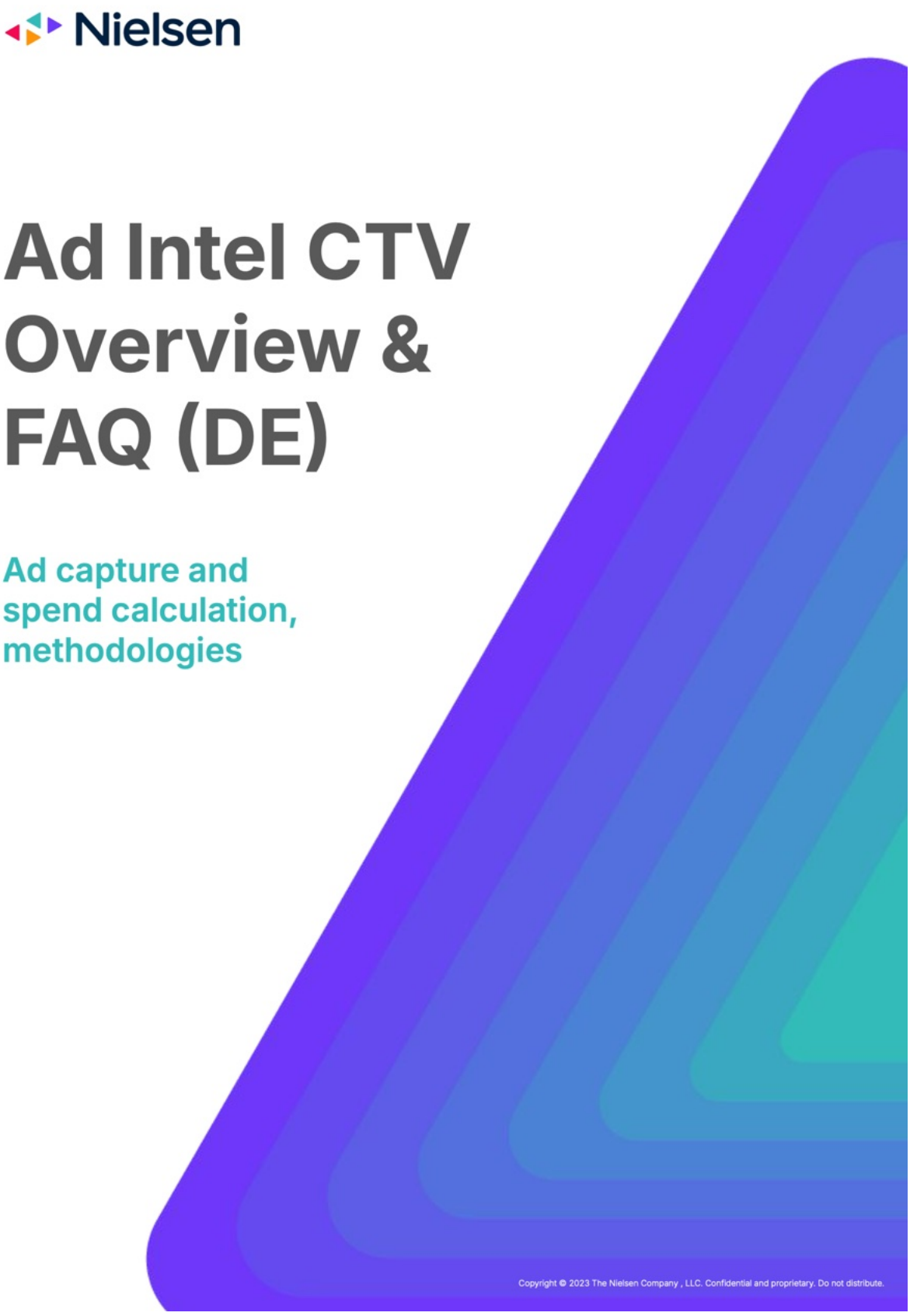
AdIntel International Digital Coverage

Digital Coverage in Nielsen markets

- Details of the capturing methodology used in each market
- Scope of coverage provided in each market

Country	Methodology	No of Sites	Display	Video	YouTube	Desktop/Mobile	Browser/In-App
New Zealand	Crawler & Human Panel	400	o	o	o	Desktop & Mobile	Browser & In-App
Norway	Crawler	250	o	o	o	Desktop & Mobile	Browser & In-App
Philippines	Crawler	225	o	o	o	Desktop & Mobile	Browser & In-App
Puerto Rico	Crawler	150	o	o	o	Desktop & Mobile	Browser & In-App
Singapore	Crawler	200	o	o	o	Desktop & Mobile	Browser & In-App
South Africa	Crawler	250	o	o	o	Desktop only	Browser only
South Korea	Crawler	50	o			Desktop only	Browser only
Spain	Crawler & Human Panel	350	o	o	o	Desktop & Mobile	Browser & In-App
Sweden	Crawler	200	o	o	o	Desktop & Mobile	Browser only
Taiwan	Crawler	85	o	o	o	Desktop & Mobile	Browser & In-App
Thailand	Crawler	200	o	o		Desktop & Mobile	Browser only
UK	Crawler	1,100	o	o	o	Desktop & Mobile	Browser & In-App
USA	Crawler & Human Panel	28,500	o	o	o	Desktop & Mobile	Browser & In-App

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Ad Intel CTV Overview & FAQ (DE)
Ad capture and spend calculation, methodologies
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Coverage

Answers to your frequently asked questions

How is the data captured?

The data is captured via Nielsen data partners using 3rd party proprietary opt-in panel monitoring solutions (applications installed on the users device in which they accept to share their data with research companies such as Nielsen).

Nielsen has partnered with a data provider that has a proprietary 200,000 opt-in Smart TV panelists in Germany who install their panel products and provide consent to extract advertising content directly from the TV device. Our panel provider monitors the devices 24/7 and extracts all identified ads. The TV panel is distributed across many TV manufacturers such as LG, Samsung, TCL, Hisense, Roku TV, Google TV as well as connected devices such as Roku Players and Amazon Fire Stick.

What data is being captured?

Ad intelligence data is being captured from top CTV apps in the Germany, including Amazon Prime Video, Netflix, Disney+, RTL+, Joyn, Sky, DAZN and many others Streaming platforms like, WOW, Waipu TV and Pluto TV. This includes video ads streaming as pre, mid, and post-rolls on VOD titles and content during watch time on ad-tier platforms.

Are we capturing ads on CTV that are linear TV ad loads as well?

The panel technology is identifying the source of the program and the section within the apps, so we can determine if the source is coming from Linear channels or AVOD channels on the app. Viewing from linear channels is currently excluded to avoid duplication with linear TV reporting.

How is the panel recruited?

Nielsen's panel partner onboards the human panels through a proprietary ecosystem of consumer applications. By securing explicit, opt-in consent, they capture continuous, fully anonymized cross-platform insights 24/7. This proprietary methodology delivers comprehensive visibility into digital activity across all devices and networks, ensuring granular intelligence while maintaining strict adherence to global privacy standards.

How is the panel's composition and distribution?

The German panel maintains a highly balanced gender distribution with a strategic concentration of "digital natives" aged 18–60, ensuring a representative profile of the most active consumer segments. This sociodemographic depth is underpinned by a robust regional footprint and extensive city wise distribution, providing the necessary density for granular targeting. By combining these structural strengths, the panel offers comprehensive market coverage that aligns with complex demographic and geographic requirements.

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Platform Coverage

Full list of streaming platforms measured

Data collection	• Smart TV panel • 24/7 monitoring & collection
Device	• Desktop: Windows PC, MacBook (MacOS) • Mobile: Android, iOS • CTV
Platforms	• See full list below
Transaction type	• Direct • Programmatic
Insight	• Estimated ad impressions • Estimated ad spend • Creative • Calculated CPM

Data Starting January 1st, 2026 for following platforms:

- Amazon Prime Video
- Netflix
- Disney+
- RTL+
- Joyn
- Sky
- WOW
- Waipu TV
- Pluto TV
- Paramount+
- DAZN
- YouTube (Smart TV)

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Ad Impressions

Answers to your frequently asked questions

What are the key Parameters for Calculating CTV Ad Spend?

Devices

- Smart TV – Monitored 24/7 for all viewers watched content
- Mobile – Mobile devices and tablets
- Desktop – Desktop devices

Video Ad Position

- Pre-roll
- Mid-roll
- Post-roll

Ad-Tech Data

- Ad transaction type – i.e. Programmatic, Direct.
- Ad impression day and time and content
- Ad impression market

Smart TV Audience Metrics

- Smart TV devices – Number of streaming devices per market
- Viewers – Number of viewers per CTV app
- Watch time – Average watch time per viewer per CTV app

How are impressions calculated?

Impressions calculation for CTV is based on 2 parameters –

- CTV device distribution
- Watch time

Both parameters are calculated from the CTV panel, and extrapolated to Germany streaming device population per app. This extrapolation provides the total distribution of watchers per CTV app, and the share of voice of the ads as recorded by the panel would be extrapolated accordingly.

How is spend calculated?

The impressions figures which were calculated above for each unique advertisement will be then multiplied by the CPM data we source from multiple providers and partners and include CTV programmatic rates per app, and premium CPM rate cards per app. The algorithm calculates per each placement if it was bought programmatically or direct and accordingly assigns the right CPM to the collected ad occurrence. The daily aggregation of the data provides the total spend based on this methodology.

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Ad Spend

Answers to your frequently asked questions

Which are the sources for CPM?

Our data provider has direct integration with ad exchanges through the platform APIs. They calculate moving daily averages for programmatic placements based on that. Nielsen also sources agency rate cards and declared rate card of which are being used for spend calibrations.

Is a general CPM rate calculated for all campaigns on all platforms?

For each ad, a series of elements are taken into account for the ad spend calculation, among which

- Device type (i.e. Desktop, Mobile)
- Advertising channel (i.e. streaming platform)
- Creative Video Duration
- Ad Position (i.e. Pre-roll, Mid-roll, Post-roll)

What are the different Ad Buying Types identified?

Our data provider employs a multi-point data extraction process for every ad occurrence. They can identify the transaction method as follows:

- **Direct:** There is a direct relationship between the advertiser and the publisher with no detected mediator in either chain.
- **Programmatic Direct:** This involves a private marketplace transaction, often an automated guaranteed process.
- **Programmatic**: This is a typical programmatic/real-time bidding (RTB) transaction.

Is the Spend reported net or gross?

The Spend figures reported are Gross estimates. They are calculated by taking observed ad volumes and applying estimated CPM rates.

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Annex B: Nielsen Ad Intel International Paid Social Ad Spend Estimation & Coverage

Nielsen

AD INTEL INTERNATIONAL
Paid Social
Coverage & Methodology

January 2026

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Ad Spend Estimation

Impression Estimate

To calculate Paid Social spend, we first combine the activity captured by our panel with page view statistic of the social channels monitored to estimate the total daily impressions for each creative ad captured.

STEP 01
From the Panel

AD DISTRIBUTION RATE

Frequency with which panellists encounter ads during daily page visits.

100k Facebook UK visits + 10k ads/day
= **10% Distribution Rate**

CAMPAIGN SOV

Share of voice claimed by a campaign out of all daily impressions served.

10k total ads + 2k 'Ford Focus ABC'
= **20% Campaign SOV**

STEP 02
Official Statistics

OFFICIAL PAGE VIEW STATS

Number of daily page views officially declared by reputable traffic analysts.

Official Facebook Report (UK):
10 Million daily page views

STEP 03
Correlated Volume

1. TOTAL AD VOLUME

Correlating official views with the known Ad Distribution Rate.

10M views × 10% rate
= **1 Million Daily Impressions**

2. CAMPAIGN VOLUME

Correlating total site volume with the known Campaign SOV.

1M impressions × 20% SOV
= **200k Daily Impressions**

Estimated: 200,00 Daily Imps

Ad Spend Estimation

Ad Spend Calculation

From the estimated impression volume we extrapolate Ad Spend Estimates using multi-source data validation and interpolation techniques."

STEP 04
Ad Exchanges

Technology allows reading CPMs in real time from programmatic transactions of individual ad impressions.

Ex. Ford Focus ABC Campaign identified @ $2.00 avg CPM (May 2025)

STEP 05
3rd Parties

Declared agency and partner rate cards provide a parallel source of CPM information for comparative analysis.

Ex. Independent analysis identified avg Facebook CPM of $2.00 (May 2025)

STEP 06
Validation

CPMs from exchanges and third parties are interpolated to obtain the highest possible accuracy for the report.

Ex. Confirmed average CPM of $2.00 on Facebook UK during May 2025

STEP 06
Impression Volume

Volumes estimated via logical models based on daily activity (Ref: Slide 5 Methodology).

Ex. 200k daily impressions x 31 days = 6.2 million impressions (Facebook UK)

Final Step
Estimated Ad Spend Calculation

Correlation of **Known CPM** and **Estimated Volume** to derive final spend.

Ad Spend = 6,200,000 Impressions / 1000 x $2.00 CPM
= $12,400

Ad Spend Estimation

Frequently Asked Questions

Answers about the capture of Paid Social ads and the estimation of impression & ad spend values.

CAPTURE

- Ad intelligence for social is measured by the **human panel** due to privacy and regulation restrictions of these networks.
- Capture starts from the moment the panelist engages with a social app/website and ends when the app is closed.
- All ads appearing on screen and **scrolled through** are identified and collected in real time.

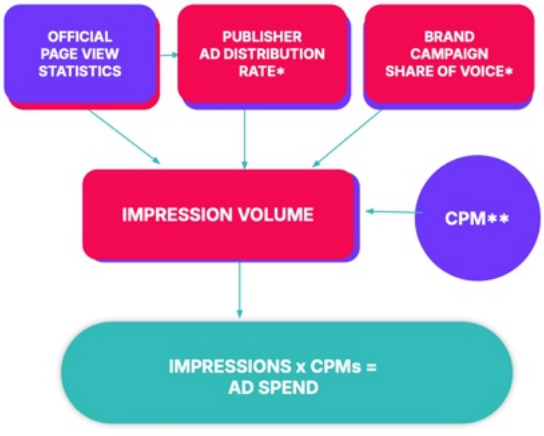
IMPRESSIONS

- Impressions are delivered on a **daily basis** per ad, campaign, website, and publisher.
- Total number of unique visitors and page views is based on traffic statistics provided by third-party partners.
- Our primary industry-leading source for these traffic metrics is **SimilarWeb**.

AD SPEND

- CPM rates utilize thousands of parameters including **country, device, placement**, and audience segment.
- Rates are obtained via **direct integration** with ad exchanges and platform APIs.
- We utilize the **FBX platform** for FB/Instagram rates, moving daily averages, and agency rate cards.

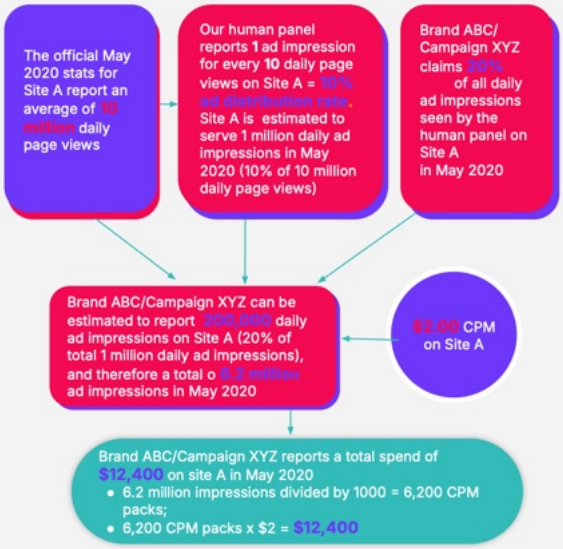
Ad Spend Estimation Model Summary



*Data from opt-in human panel
** Data from Ad Exchange and/or agencies and partners

Example:

- Social Media platform: Site A
- Brand ABC/Campaign XYZ
- Period: May 2020
- Country: U.K.



Paid Social Market Coverage

Paid Social Coverage in Nielsen markets

- Paid Social spend & creatives are covered in all of the following Nielsen markets.
- Data is available for all sectors and is fully coded into the Nielsen taxonomy.
- Both Competitor advertiser & Top XXX Advertiser briefs available
- The following Social channels are covered in each market from the stated date

Country	Panel Size (Jan-26)	Coverage	Facebook	Instagram	X (Twitter)	TikTok	Pinterest	LinkedIn	Reddit
AUSTRALIA	616,420	Full Category	Jan 2021	Oct 2021	Jan 2021	Apr 2023	Jan 2025	Jan 2025	
BELGIUM	154,779	Full Category	Aug 2021	Aug 2021	Aug 2021	Oct 2023			
BRAZIL	892,627	Full Category	Jan 2022	Jan 2022	Jan 2022	Jan 2023		May 2024	
DENMARK	160,381	Full Category	Sep 2022	Sep 2022	Sep 2022	Jul 2024	Mar 2025	Mar 2025	
GERMANY	729,062	Full Category	Jan 2021	Aug 2021	Jan 2021	Jul 2025	Jul 2025	Jul 2025	Jul 2025
INDONESIA	613,720	Full Category	Oct 2021	Oct 2021	Oct 2021				
ITALY	680,382	Full Category	Jan 2021	Aug 2021	Jan 2021	Jan 2024			
NETHERLANDS	358,297	Full Category	Jan 2022	Jan 2022	Jan 2022	Jan 2023			
NEW ZEALAND	138,593	Full Category	Jun 2021	Sep 2021	Jun 2021	Nov 2022	Jan 2025	Jan 2025	
NORWAY	173,331	Full Category	Aug 2021	Aug 2021	Aug 2021			Oct 2024	
PHILIPPINES	369,374	Full Category	Apr 2022	Apr 2022	Apr 2022	Jan 2023			
PUERTO RICO	50,975	Full Category	May 2022	May 2022	May 2022				
SINGAPORE	202,389	Full Category	Sep 2021	Sep 2021	Sep 2021				
SPAIN	638,126	Full Category	Jan 2022	Jan 2022	Jan 2022	Sep 2022			
THAILAND	213,424	Full Category	Aug 2025	Aug 2025					
UK	1,217,835	Full Category	Jan 2021	Aug 2021	Jan 2021	Jan 2023		Jul 2024	
USA	6,191,091	Full Category	Jan 2020	Jul 2021	Aug 2020	Nov 2022	Mar 2024		Jan 2020

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Paid Social Market Coverage

Paid Social Coverage in Non-Nielsen markets

- Paid Social spend & creatives is available in the following additional markets.
- Data is available for specific client briefs for a nominated list of brands, which will be harmonised into Nielsen's global taxonomy
- Competitor advertisers briefs only. Top XXX Advertiser reports not available
- The following Social channels are covered in each market from the stated date

Country	Panel Size (Jan-26)	Coverage	Facebook	Instagram	X (Twitter)	TikTok	Pinterest	LinkedIn	Reddit
ARGENTINA	725,371	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
AUSTRIA	86,155	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
CANADA	629,081	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
CHILE	215,754	Nominated Brands only	Mar 2022	Mar 2022	Mar 2022	Jan 2023	Jan 2024	Mar 2024	
COLOMBIA	429,837	Nominated Brands only	Mar 2022	Mar 2022	Mar 2022	Jan 2023	Jan 2024	Mar 2024	
CZECHIA	96,430	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
EGYPT	155,001	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
FINLAND	173,366	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
FRANCE	621,327	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
GREECE	85,790	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
HONG KONG	172,523	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
HUNGARY	78,581	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
INDIA	1,978,291	Nominated Brands only	Jan 2020	Aug 2021	Sep 2020	Jan 2023	Jan 2024	Mar 2024	
IRELAND	52,634	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	
ISRAEL	80,651	Nominated Brands only	Jan 2023	Jan 2023	Jan 2023	Jan 2023	Jan 2024	Mar 2024	

continued on the next page

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Nielsen

Annex C: List of travel influencers with Instagram profiles and at least 100,000 followers

Table 8: List of travel influencers

	#Followers	Residence	Country	Continent	Gender	# Posts 2025
1	24.200.000	Dubai	UAE	Middle East	Male	230
2	19.600.000	unknown	unknown	unknown	unknown	195
3	7.000.000	Vancouver Island	Canada	North America	Male	170
4	4.600.000	Canada & Spain	Spain	Europe	Couple	5
5	3.500.000	New York	USA	North America	Male	96
6	3.300.000	New Delhi	India	Asia	Male	
7	3.200.000	Hawaii	USA	North America	Couple	68
8	3.200.000	Los Angeles	USA	North America	Female	300
9	2.900.000	unknown	unknown	unknown	unknown	248
10	2.700.000	Los Angeles	USA	North America	Male	
11	2.500.000	Bangkok	Thailand	Asia	Male	80
12	2.500.000	UK	UK	Europe	Female	100
13	2.400.000	Hamburg	Germany	Europe	Female	
14	2.400.000	Chicago	USA	North America	Male	97
15	2.300.000	Miami	USA	North America	Male	219
16	2.200.000	Freckenfeld	Germany	Europe	Male	435
17	1.900.000	unknown	unknown	unknown	unknown	10
18	1.800.000	Dubai	UAE	Middle East	Female	94
19	1.800.000	Montana	USA	North America	Male	80
20	1.800.000	Seattle	USA	North America	Male	
21	1.700.000	Sao Paulo	Brasil	South America	Male	260
22	1.700.000	Multan City	Pakistan	Asia	Male	
23	1.700.000	Noida	India	Asia	Male	
24	1.700.000	Hessen	Germany	Europe	Male	60
25	1.700.000	Dubai	UAE	Middle East	Couple	235
26	1.600.000	Thailand	Thailand	Asia	Male	208
27	1.600.000	Australia	Australia	Australia	Couple	185
28	1.600.000	Wiesbaden	Germany	Europe	Female	65
29	1.600.000	New Jersey	USA	North America	Male	92
30	1.500.000	Cologne	Germany	Europe	Female	91
31	1.500.000	Mumbai	India	Asia	Female	132
32	1.500.000	Singapore	Singapore	Asia	Female	
33	1.500.000	London	UK	Europe	Couple	340
34	1.500.000	Dubai	UAE	Middle East	Male	13
35	1.400.000	Milan	Italy	Europe	Couple	130
36	1.400.000	Dubai	UAE	Middle East	Male	56
37	1.400.000	USA	USA	North America	Female	111
38	1.400.000	Sao Paulo	Brazil	South America	Female	
39	1.300.000	Sydney	Australia	Australia	Female	140
40	1.300.000	unknown	unknown	unknown	Male	145

41	1.200.000	County Cork	Ireland	Europe	Male	285
42	1.200.000	Australia	Australia	Australia	Female	34
43	1.200.000	Kanton Obwalden	Switzerland	Europe	Male	40
44	1.200.000	Finland	Finland	Europe	Male	45
45	1.200.000	Hawaii	USA	North America	Female	185
46	1.200.000	USA	USA	North America	Female	189
47	1.200.000	Denver	USA	North America	Male	
48	1.200.000	Buenor Aires	Argentina	South America	Female	
49	1.100.000	Athens	Greece	Europe	Male	142
50	1.100.000	Paris	France	Europe	Female	152
51	1.100.000	Stockholm	Sweden	Europe	Female	159
52	1.100.000	Lissabon	Portugal	Europe	Female	360
53	1.100.000	Cologne	Germany	Europe	Couple	
54	1.100.000	Dehli	India	Asia	Male	
55	1.100.000	Kyrenia	Cyprus	Europe	Male	66
56	1.100.000	USA	USA	North America	Female	60
57	1.100.000	Canada	Canada	North America	Male	100
58	1.100.000	New York	USA	North America	Male	110
59	1.000.000	Iceland	Iceland	Europe	Male	109
60	1.000.000	Malaga	Spain	Europe	Male	217
61	1.000.000	Barcelona	Spain	Europe	Female	
62	1.000.000	Paris	France	Europe	Male	17
63	1.000.000	UK	UK	Europe	Female	67
64	1.000.000	Bristol	UK	Europe	Male	70
65	1.000.000	Dubai	UAE	Middle East	Female	
66	1.000.000	Texas	USA	North America	Female	315
67	997.000	Novato	Italy	Europe	Male	75
68	990.000	Miami	USA	North America	Couple	130
69	983.000	Berlin	Germany	Europe	Female	64
70	979.000	USA	USA	North America	Male	97
71	927.000	Toronto	Canada	North America	Couple	178
72	925.000	Los Angeles	USA	North America	Female	17
73	918.000	Madrid	Spain	Europe	Female	
74	910.000	Seattle	USA	North America	Female	85
75	890.000	Italy	Italy	Europe	Female	61
76	877.000	USA	USA	North America	Male	17
77	875.000	Moscow	Russia	Europe	Female	200
78	874.000	Dubai	UAE	Middle East	Male	335
79	863.000	Tunis	Tunesia	Africa	Male	72
80	853.000	Denver	USA	North America	Male	
81	824.000	USA	USA	North America	Male	102
82	816.000	Italy	Italy	Europe	Male	45
83	814.000	Istanbul	Turkey	Europe	Female	115
84	811.000	Italy	Italy	Europe	Male	51
85	800.000	Madrid I Valencia	Spain	Europe	Couple	108
86	793.000	Asia	unknown	unknown	Male	46

87	764.000	Los Angeles	USA	North America	Female	201
88	759.000	Denpasar	Indoneisa	Asia	Female	
89	747.000	USA	USA	North America	Male	62
90	741.000	Rome	Italy	Europe	Female	91
91	741.000	Shanghai	China	Asia	Female	40
92	731.000	London	UK	Europe	Female	145
93	719.000	New Jersey	USA	North America	Male	13
94	716.000	Vancouver	Canada	North America	Male	43
95	712.000	Bali	Indonesia	Asia	Male	63
96	691.000	USA	USA	North America	Couple	188
97	688.000	Berlin	Germany	Europe	Female	123
98	684.000	Berlin	Germany	Europe	Male	115
99	684.000	Rotterdam	Netherlands	Europe	Male	
100	681.000	New York	USA	North America	Couple	286
101	677.000	USA	USA	North America	Male	11
102	674.000	Oregon	USA	North America	Couple	
103	664.000	Byron Bay	Australia	Australia	Female	127
104	659.000	USA	USA	North America	Male	72
105	651.000	Atlanta	USA	North America	Female	145
106	647.000	Vancouver	Canada	North America	Female	223
107	645.000	Dresden	Germany	Europe	Female	185
108	635.000	Barcelona	Spain	Europe	Female	
109	626.000	Barcelona	Spain	Europe	Female	
110	623.000	Jamshedpur	India	Asia	Male	
111	623.000	Calgary	Canada	North America	Male	
112	601.000	Prague	Czech Republic	Europe	Female	
113	599.000	Houston	USA	North America	Couple	223
114	576.000	Toronto	Canada	North America	Male	10
115	572.000	Glasgow	UK	Europe	Female	
116	562.000	Kelowna	Canada	North America	Male	110
117	542.000	Rotterdam	Netherlands	Europe	Female	
118	538.000	Switzerland	Switzerland	Europe	Female	275
119	530.000	Iceland	Iceland	Europe	Female	188
120	529.000	Australia	Australia	Australia	Female	230
121	528.000	New York	USA	North America	Female	151
122	513.000	Pescera	Italy	Europe	Couple	
123	511.000	San Diego	USA	North America	Female	79
124	505.000	USA	USA	North America	Male	20
125	504.000	Berlin	Germany	Europe	Male	25
126	503.000	Lithuania	Lithuania	Europe	Female	116
127	502.000	San Francisco	USA	North America	Female	
128	494.000	Catania	Italy	Europe	Couple	
129	492.000	San Diego	USA	North America	Female	377
130	491.000	Utah	USA	North America	Male	38
131	489.000	UK	UK	Europe	Couple	110
132	486.000	London	UK	Europe	Male	90

133	478.000	Geneva	Switzerland	Europe	Female	
134	474.000	London	UK	Europe	Female	
135	470.000	Philippines	Philippines	Asia	Male	38
136	457.000	Texas	USA	North America	Male	
137	456.000	Karlsruhe	Germany	Europe	Female	50
138	446.000	Stuttgart	Germany	Europe	Male	
139	446.000	Miami	USA	North America	Male	291
140	444.000	Paris	France	Europe	Female	105
141	434.000	California	USA	North America	Male	97
142	431.000	New York	USA	North America	Female	
143	429.000	Bochum	Germany	Europe	Male	219
144	429.000	Los Angeles	USA	North America	Male	119
145	426.000	London	UK	Europe	Female	119
146	418.000	Da Nang	Vietnam	Asia	Female	202
147	418.000	Atlanta	USA	North America	Female	288
148	415.000	Germany	Germany	Europe	Male	205
149	415.000	Vancouver	Canada	North America	Female	185
150	414.000	Lissabon	Portugal	Europe	Couple	164
151	408.000	Toronto	Canada	North America	Female	
152	408.000	Portland	USA	North America	Male	
153	406.000	UK	UK	Europe	Male	66
154	405.000	Breda	Netherlands	Europe	Couple	220
155	405.000	London	UK	Europe	Male	76
156	405.000	Huntington Beach	USA	North America	Female	
157	394.000	Norway	Norway	Europe	Couple	154
158	394.000	Arizona	USA	North America	Female	
159	382.000	Atlanta	USA	North America	Female	
160	379.000	unknown	unknown	unknown	Female	143
161	375.000	Seattle	USA	North America	Male	101
162	368.000	Praha	Czech Republic	Europe	Female	
163	367.000	Poland	Poland	Europe	Female	70
164	367.000	Ojai	USA	North America	Male	59
165	359.000	London	UK	Europe	Male	126
166	354.000	Slovenia	Slovenia	Europe	Male	69
167	350.000	Vancouver	Canada	North America	Male	
168	349.000	Padua	Italy	Europe	Couple	121
169	347.000	Brazil	Brasil	South America	Female	100
170	342.000	Germany	Germany	Europe	Male	160
171	340.000	California	USA	North America	Male	114
172	338.000	Birmingham	UK	Europe	Male	115
173	331.000	Paris	France	Europe	Male	195
174	330.000	USA	USA	North America	unknown	97
175	328.000	London	UK	Europe	Female	80
176	324.000	Los Angeles	USA	North America	Male	68
177	322.000	San Diego	USA	North America	Couple	78
178	318.000	Paris	France	Europe	Female	249

179	314.000	Norway	Norway	Europe	Male	36
180	314.000	Toronto	Canada	North America	Male	
181	312.000	San Francisco	USA	North America	Female	230
182	312.000	Miami	USA	North America	Female	
183	311.000	USA	USA	North America	Female	166
184	309.000	Mumbai	India	Asia	Female	112
185	309.000	Singapore	Singapore	Asia	Couple	
186	308.000	Miami	USA	North America	Female	165
187	305.000	Utah	USA	North America	Female	190
188	302.000	Barcelona	Spain	Europe	Female	142
189	300.000	Athens	Greece	Europe	Female	
190	294.000	Spain	Spain	Europe	Female	89
191	289.000	Manila	Philippines	Asia	Female	
192	288.000	Calgary	Canada	North America	Female	
193	284.000	Dubai	UAE	Middle East	Female	70
194	283.000	Toulouse	France	Europe	Couple	
195	277.000	France	France	Europe	Couple	175
196	274.000	Dieburg	Germany	Europe	Male	70
197	274.000	Mississauga	Canada	North America	Couple	
198	264.000	Florida	USA	North America	Couple	355
199	261.000	London	UK	Europe	Female	61
200	258.000	Bangalore	India	Asia	Female	
201	255.000	Canada	Canada	North America	Male	140
202	254.000	London	UK	Europe	Female	
203	254.000	Los Angeles	USA	North America	Female	227
204	254.000	Oaxaca	Mexico	South America	Male	
205	253.000	Aspen	USA	North America	Female	
206	248.000	Australia	Australia	Australia	Female	157
207	248.000	Cologne	Germany	Europe	Male	49
208	246.000	Hanoi	Vietnam	Asia	Couple	
209	245.000	Bologna	Italy	Europe	Male	
210	245.000	Dubai	UAE	Middle East	Female	107
211	244.000	Canada	Canada	North America	Female	104
212	242.000	San Francisco	USA	North America	Female	78
213	237.000	Bratislava	Slovakia	Europe	Couple	
214	234.000	Washington	USA	North America	Female	
215	233.000	Austria	Austria	Europe	Female	195
216	230.000	Canada	Canada	North America	Male	44
217	229.000	USA	USA	North America	Female	60
218	228.000	Budapest	Hungary	Europe	Couple	
219	228.000	USA	USA	North America	Female	64
220	227.000	Verona	Italy	Europe	Female	
221	226.000	Los Angeles	USA	North America	Female	
222	225.000	Schaffhausen	Switzerland	Europe	Male	
223	224.000	Chandigarh	India	Asia	Male	
224	224.000	San Diego	USA	North America	Female	73

225	223.000	Phuket	Thailand	Asia	Female	
226	223.000	USA	USA	North America	Female	70
227	223.000	Birmingham	USA	North America	Couple	
228	222.000	Raleigh	USA	North America	Female	
229	220.000	Den Haag	Netherlands	Europe	Couple	146
230	220.000	Jackson	USA	North America	Female	7
231	219.000	London	UK	Europe	Male	83
232	217.000	California	USA	North America	Female	203
233	216.000	Dubai	UAE	Middle East	Female	75
234	216.000	Miami	USA	North America	Female	
235	215.000	Rome	Italy	Europe	Male	
236	215.000	Florida	USA	North America	Couple	
237	214.000	Bangkok	Thailand	Asia	Male	
238	210.000	New York	USA	North America	Male	
239	207.000	unknown	unknown	unknown	Female	103
240	206.000	New Zealand	New Zealand	Australia	Female	83
241	203.000	Mumbai	India	Asia	Female	128
242	203.000	Belfast	UK	Europe	Male	
243	201.000	Sacramento	USA	North America	Female	
244	200.000	Dubai	UAE	Middle East	Female	
245	199.000	Jupiter	USA	North America	Female	
246	198.000	Atlanta	USA	North America	Female	162
247	197.000	Arkansas	USA	North America	Female	
248	195.000	London	UK	Europe	Male	131
249	194.000	Barcelona	Spain	Europe	Female	
250	194.000	Washington	USA	North America	Female	45
251	194.000	New York	USA	North America	Female	98
252	193.000	New Delhi	India	Asia	Male	
253	193.000	Seattle	Australia	Australia	Female	
254	191.000	Alexandria	USA	North America	Female	
255	190.000	Tokyo	Japan	Asia	Female	
256	187.000	Utah	USA	North America	Female	
257	187.000	Jonesboro	USA	North America	Couple	
258	185.000	Thailand	Thailand	Asia	Couple	145
259	185.000	Boston	USA	North America	Female	125
260	184.000	Marbella	Spain	Europe	Male	82
261	184.000	Dubai	UAE	Middle East	Female	
262	184.000	Atlanta	USA	North America	Female	
263	183.000	Florence	Italy	Europe	Couple	
264	183.000	Canada	Canada	North America	Couple	5
265	178.000	London	UK	Europe	Female	
266	178.000	Atlanta	USA	North America	Couple	5
267	178.000	Toronto	Canada	North America	Female	126
268	177.000	Vancouver	Canada	North America	Couple	73
269	176.000	London	UK	Europe	Couple	48
270	176.000	Seattle	USA	North America	Female	

271	174.000	Sierninghofen	Austria	Europe	Female	
272	174.000	unknown	unknown	unknown	Female	151
273	172.000	Oslo	Norway	Europe	Male	
274	172.000	Seattle	USA	North America	Couple	
275	172.000	Montreal	Canada	North America	Male	
276	169.000	Berlin	Germany	Europe	Female	
277	169.000	Florida	USA	North America	Male	
278	169.000	unknown	unknown	unknown	Couple	110
279	168.000	London	UK	Europe	Female	
280	167.000	Dubai	UAE	Middle East	Male	270
281	166.000	Geneva	Switzerland	Europe	Female	3
282	165.000	UK	UK	Europe	Male	103
283	164.000	Erkelenz	Germany	Europe	Female	
284	164.000	Amsterdam	Netherlands	Europe	Female	60
285	164.000	Georgia	USA	North America	Female	
286	163.000	Abu Dhabi	UAE	Middle East	Female	
287	163.000	Texas	USA	North America	Male	42
288	163.000	USA	USA	North America	Female	97
289	162.000	Doha	Qatar	Middle East	Male	
290	160.000	Polska Cerekiew	Poland	Europe	Female	
291	160.000	Hawaii	USA	North America	Male	49
292	160.000	Victoria	Canada	North America	Couple	
293	159.000	London	UK	Europe	Female	90
294	159.000	Montana	USA	North America	Female	150
295	157.000	Galiza	Spain	Europe	Female	87
296	157.000	London	UK	Europe	Female	124
297	157.000	Miami	USA	North America	Female	
298	156.000	Vancouver	Canada	North America	Female	
299	155.000	Gold Coast	Australia	Australia	Couple	
300	155.000	Los Angeles	USA	North America	Female	362
301	154.000	Seoul	South Korea	Asia	Female	
302	153.000	London	UK	Europe	Female	
303	153.000	London	UK	Europe	Male	
304	152.000	Bali	Indonesia	Asia	Female	120
305	152.000	San Francisco	USA	North America	Male	
306	151.000	Nashville	USA	North America	Female	
307	148.000	UK	UK	Europe	Female	88
308	147.000	Mainz	Germany	Europe	Female	
309	147.000	Manchester	UK	Europe	Female	
310	146.000	Austin	USA	North America	Female	72
311	145.000	USA	USA	North America	Male	84
312	145.000	Canada	Canada	North America	Female	90
313	143.000	Verona	Italy	Europe	Male	
314	143.000	Paris	France	Europe	Male	
315	142.000	Bandung	Indoneisa	Asia	Couple	
316	142.000	New York	USA	North America	Female	177

317	141.000	Nuremberg	Germany	Europe	Male	
318	140.000	Finland	Finland	Europe	Female	147
319	139.000	Dubai	UAE	Middle East	Female	99
320	137.000	Istanbul	Turkey	Europe	Female	
321	136.000	Ceske Budejovice	Czech Republic	Europe	Female	
322	136.000	Tokyo	Japan	Asia	Female	
323	135.000	Livermore	USA	North America	Male	
324	134.000	Vienna	Austria	Europe	Female	
325	134.000	Clearfield	USA	North America	Couple	
326	132.000	USA	USA	North America	Male	118
327	132.000	California	USA	North America	Female	159
328	132.000	unknown	unknown	unknown	Female	106
329	131.000	London	UK	Europe	Female	111
330	131.000	New York	USA	North America	Female	
331	130.000	France	France	Europe	Male	11
332	129.000	USA	USA	North America	Female	93
333	128.000	Bali	Indonesia	Asia	Female	140
334	128.000	California	USA	North America	Female	27
335	128.000	Brooklyn	USA	North America	Female	
336	127.000	Dixfield	UK	Europe	Couple	
337	127.000	Orlando	USA	North America	Couple	
338	126.000	Paris	France	Europe	Couple	
339	126.000	Manchester	UK	Europe	Female	
340	125.000	Jersey City	USA	North America	Female	
341	124.000	Jakarta	Indonesia	Asia	Couple	
342	123.000	Riga	Latvia	Europe	Female	
343	123.000	London	UK	Europe	Male	
344	123.000	Chicago	USA	North America	Female	
345	123.000	San Diego	USA	North America	Couple	
346	122.000	Kent	UK	Europe	Female	
347	122.000	Romania	Romania	Europe	Female	48
348	122.000	Dubai	UAE	Middle East	Male	
349	122.000	Los Angeles	USA	North America	Female	
350	120.000	Des Moines	USA	North America	Couple	
351	119.000	Miami	USA	North America	Female	135
352	119.000	Campo Grande	Brazil	South America	Male	178
353	118.000	Chicago	USA	North America	Female	0
354	118.000	Boston	USA	North America	Couple	133
355	117.000	Jaipur	India	Asia	Male	
356	117.000	Brisbane	Australia	Australia	Female	
357	117.000	Miami	USA	North America	Female	
358	117.000	Spokane	USA	North America	Female	
359	117.000	Guatemala	Guatemala	South America	Female	207
360	116.000	Lapland	Finland	Europe	Female	123
361	116.000	Manchester	UK	Europe	Male	200
362	116.000	Pacific Northwest	USA	North America	Female	88

363	116.000	New York	USA	North America	Female	112
364	116.000	New York	USA	North America	Female	132
365	116.000	Charleston	USA	North America	Female	150
366	115.000	Auckland	New Zealand	Australia	Male	
367	115.000	Sydney	Australia	Australia	Male	
368	115.000	London	UK	Europe	Female	
369	115.000	North Carolina	USA	North America	Couple	97
370	115.000	Montreal	Canada	North America	Female	
371	114.000	London	UK	Europe	Female	107
372	113.000	Namur	Belgium	Europe	Female	
373	113.000	London	UK	Europe	Female	
374	113.000	Chicago	USA	North America	Female	
375	112.000	Leinach	Germany	Europe	Female	
376	112.000	Taskent	Turkey	Europe	Male	
377	112.000	California	USA	North America	Female	
378	112.000	unknown	Canada	North America	Female	
379	112.000	Charleston	USA	North America	Female	
380	111.000	Stuttgart	Germany	Europe	Female	316
381	111.000	Philippines	Philippines	Asia	Female	75
382	111.000	Falmouth	UK	Europe	Female	
383	110.000	Avignon	France	Europe	Female	
384	110.000	Turkey	Turkey	Europe	Male	5
385	110.000	London	UK	Europe	Female	26
386	110.000	California	USA	North America	Female	79
387	110.000	Miami	USA	North America	Female	
388	110.000	Utah	USA	North America	Female	
389	109.000	Romania	Romania	Europe	Female	136
390	109.000	Munich	Germany	Europe	Female	
391	108.000	Washington	USA	North America	Female	67
392	108.000	Wyoming	USA	North America	Couple	246
393	108.000	Buenor Aires	Argentina	South America	Female	
394	107.000	Seoul	South Korea	Asia	Female	
395	106.000	Germany	Germany	Europe	Female	110
396	106.000	Split	Croatia	Europe	Female	
397	106.000	UK	UK	Europe	Couple	88
398	106.000	Knoxville	USA	North America	Female	
399	106.000	Los Angeles	USA	North America	Couple	
400	106.000	New York	USA	North America	Female	
401	105.000	Belgium	Belgium	Europe	Male	101
402	105.000	London	UK	Europe	Female	104
403	105.000	New York	USA	North America	Male	53
404	104.000	Catania	Italy	Europe	Male	
405	104.000	Los Angeles	USA	North America	Female	23
406	104.000	Atlanta	USA	North America	Female	173
407	104.000	Oklahoma	USA	North America	Female	
408	104.000	unknown	unknown	unknown	Female	45

409	103.000	Miami	USA	North America	Female	
410	103.000	Guadalajara	Mexico	South America	Couple	
411	102.000	Tanzania	Tanzania	Africa	Male	74
412	102.000	Bali	Indonesia	Asia	Couple	270
413	102.000	Leeds	UK	Europe	Female	
414	102.000	South Carolina	USA	North America	Female	49
415	101.000	Kazakhstan	Kazakhstan	Asia	Male	81
416	101.000	Gold Coast	Australia	Australia	Female	
417	101.000	Nottingham	UK	Europe	Male	105
418	101.000	Los Angeles	USA	North America	Male	116
419	101.000	Miami	USA	North America	Female	
420	101.000	Miami	USA	North America	Female	
421	100.000	Perth	Australia	Australia	Female	13
422	100.000	Dubai	UAE	Middle East	Male	
423	100.000	Miami	USA	North America	Female	
424	100.000	Palm Springs	USA	North America	Male	
425	100.000	New York	USA	North America	Couple	

Source: Own research T3

Annex D: Flight routes of the 25 selected travel influencers

In the following we display the flight routes of our sample of 25 travel influencers which we selected from our long list of travel influencers. These were influencers with more than 100,000 followers on Instagram in July 2026.

Figure 13: Flights of travel influencer A, 2025



Source: Own research T3

Figure 14: Flights of travel influencer B, 2025



Source: Own research T3

Figure 15: Flights of travel influencer C, 2025



Source: Own research T3

Figure 16: Flights of travel influencer D, 2025



Source: Own research T3

Figure 17: Flights of travel influencer E, 2025



Source: Own research T3

Figure 18: Flights of travel influencer F, 2025



Source: Own research T3

Figure 19: Flights of travel influencer G, 2025



Source: Own research T3

Figure 20: Flights of travel influencer H, 2025



Source: Own research T3

Figure 21: Flights of travel influencer I, 2025



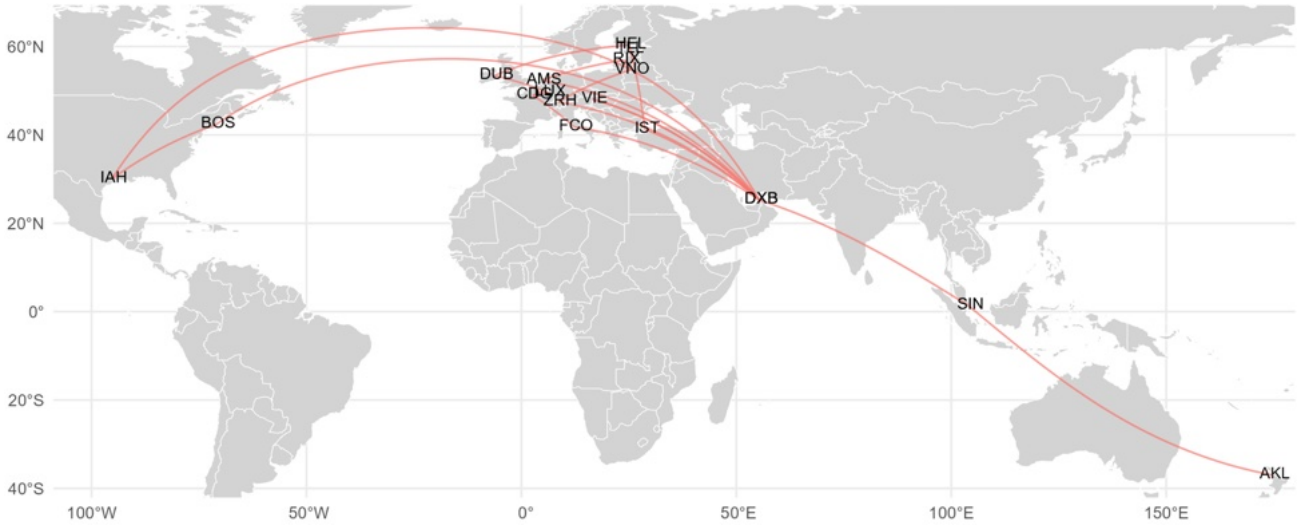
Source: Own research T3

Figure 22: Flights of travel influencer J, 2025



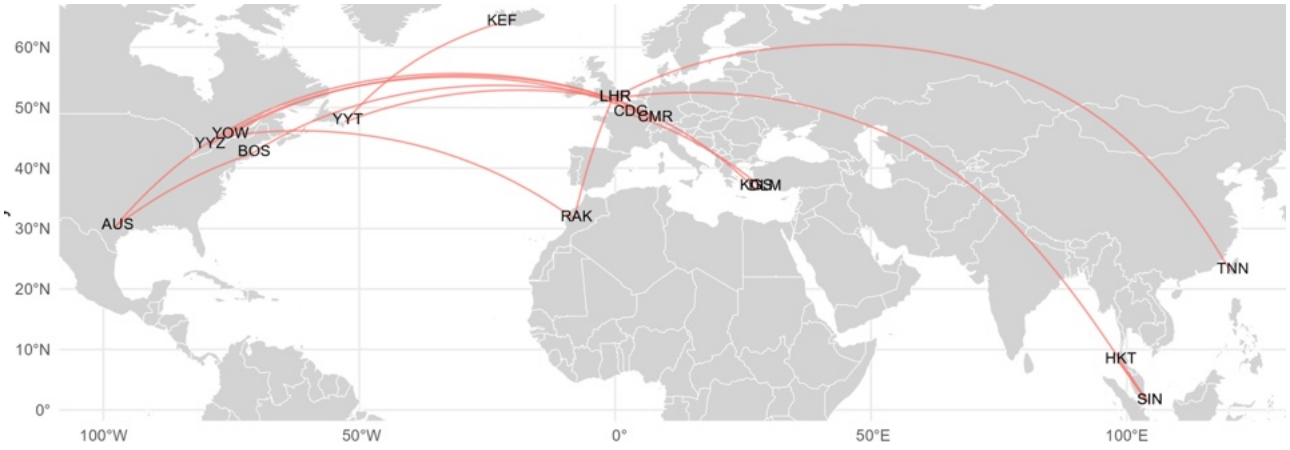
Source: Own research T3

Figure 23: Flights of travel influencer K, 2025



Source: Own research T3

Figure 24: Flights of travel influencer L, 2025



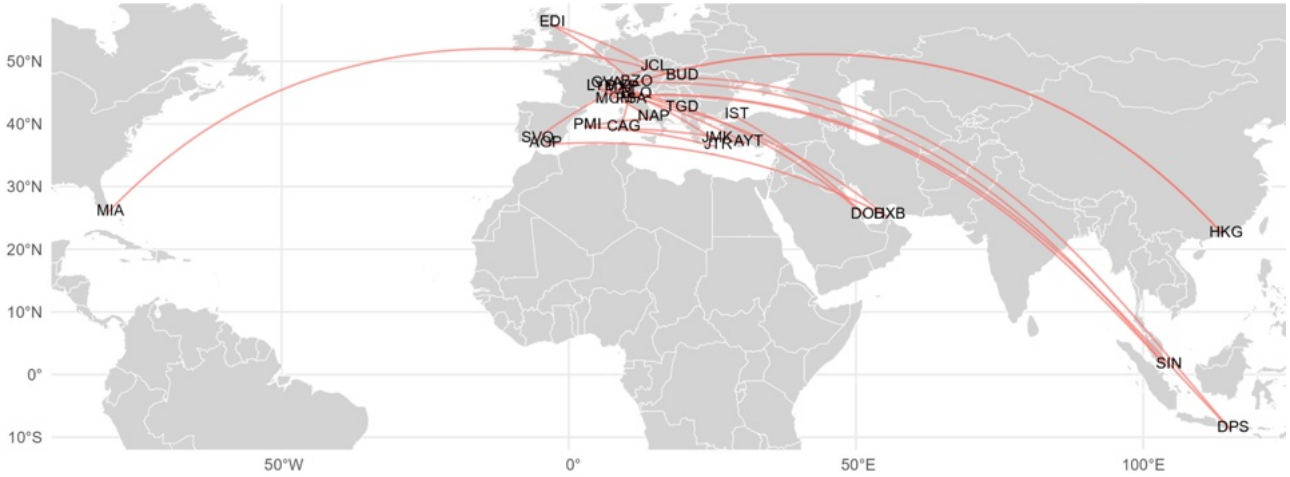
Source: Own research T3

Figure 25: Flights of travel influencer M, 2025



Source: Own research T3

Figure 26: Flights of travel influencer N, 2025



Source: Own research T3

Figure 27: Flights of travel influencer O, 2025



Source: Own research T3

Figure 28: Flights of travel influencer P, 2025



Source: Own research T3

Figure 29: Flights of travel influencer Q, 2025



Source: Own research T3

Figure 30: Flights of travel influencer R, 2025



Source: Own research T3

Figure 31: Flights of travel influencer S, 2025



Source: Own research T3

Figure 32: Flights of travel influencer T, 2025



Source: Own research T3

Figure 33: Flights of travel influencer U, 2025



Source: Own research T3

Figure 34: Flights of travel influencer V, 2025



Source: Own research T3

Figure 35: Flights of travel influencer W, 2025



Source: Own research T3

Figure 36: Flights of travel influencer X, 2025



Source: Own research T3

Figure 37: Flights of travel influencer Y, 2025



Source: Own research T3

Annex E: Ad Spend Airlines Q1/2026, CTV and Search

Table 9: Ad Spend of Airlines in Germany and the United Kingdom in Q1/2026 for search and CTV (preliminary)

Country	Local Advertiser	Media Type	Spend Local
Germany	AIR FRANCE	CTV	€ 468.094
Germany	CATHAY PACIFIC AIRWAYS	CTV	€ 200.722
Germany	CONDOR FLUGDIENST	CTV	€ 1.971.437
Germany	DT.LUFTHANSA	CTV	€ 268.366
Germany	EMIRATES	CTV	€ 2.404.977
Germany	EUROWINGS	CTV	€ 463.600
Germany	KLM ROYAL DUTCH AIRLINES	CTV	€ 101.706
Germany	AIR ARABIA	SEARCH	€ 2.633
Germany	AUSTRIAN AIRLINES	SEARCH	€ 16.855
Germany	CONDOR FLUGDIENST	SEARCH	€ 142.020
Germany	DT.LUFTHANSA	SEARCH	€ 281.325
Germany	EASYJET	SEARCH	€ 35.403
Germany	FAI RENT-A-JET	SEARCH	€ 3.683
Germany	IBERIA	SEARCH	€ 22.859
Germany	ICELANDAIR	SEARCH	€ 2.642
Germany	LUNAJETS	SEARCH	€ 33.212
Germany	SCAND.AIRLINES SYSTEM	SEARCH	€ 5.790
Germany	SUNEXPRESS	SEARCH	€ 17.706
Germany	SWISS INT.AIR LINES	SEARCH	€ 4.197
Germany	TAP AIR PORTUGAL	SEARCH	€ 13.094
Germany	TRANSAVIA AIRLINES	SEARCH	€ 27.567
United Kingdom	BRITISH AIRWAYS PLC	CTV	£ 96.164
United Kingdom	EASYJET AIRLINE CO LTD	CTV	£ 2.747.312
United Kingdom	EMIRATES AIRLINE	CTV	£ 341.418
United Kingdom	JET2 COM LTD	CTV	£ 131.875
United Kingdom	QANTAS AIRWAYS LTD	CTV	£ 180.642
United Kingdom	RYANAIR LTD	CTV	£ 340.557
United Kingdom	SINGAPORE INTERNATIONAL AIRLINES	CTV	£ 124.744
United Kingdom	AIR CANADA	SEARCH	£ 13.641
United Kingdom	AIR FRANCE	SEARCH	£ 16.748
United Kingdom	AMERICAN AIRLINES INC	SEARCH	£ 62.686
United Kingdom	AVIANCA AIRLINE	SEARCH	£ 21.586
United Kingdom	BRITISH AIRWAYS PLC	SEARCH	£ 9.396
United Kingdom	EASYJET AIRLINE CO LTD	SEARCH	£ 1.155.272
United Kingdom	EMIRATES AIRLINE	SEARCH	£ 95
United Kingdom	JET2 COM LTD	SEARCH	£ 174.714
United Kingdom	LUFTHANSA GERMAN AIRLINES	SEARCH	£ 3.214
United Kingdom	NORWEGIAN AIR SHUTTLE ASA	SEARCH	£ 6.847
United Kingdom	QATAR AIRWAYS	SEARCH	£ 13.397
United Kingdom	RYANAIR LTD	SEARCH	£ 15.726
United Kingdom	SKY CHARTER UK (RAMSGATE)	SEARCH	£ 1.150
United Kingdom	TAP AIR PORTUGAL	SEARCH	£ 6.623
United Kingdom	TUI GROUP AIRLINES	SEARCH	£ 454.872
United Kingdom	TURKISH AIRLINES	SEARCH	£ 204
United Kingdom	VIRGIN ATLANTIC AIRWAYS LTD	SEARCH	£ 55.860

Source: Nielsen, 2026