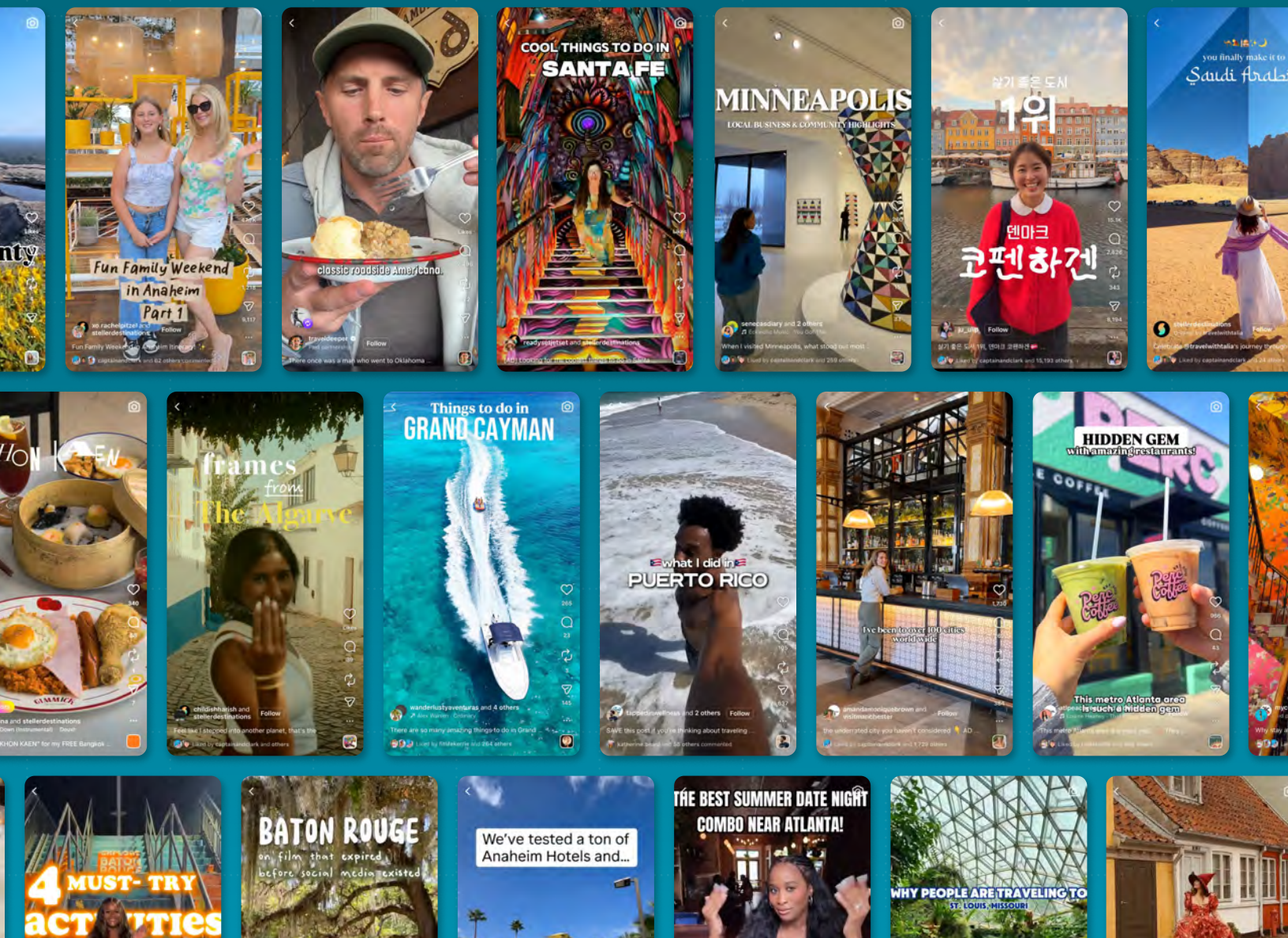
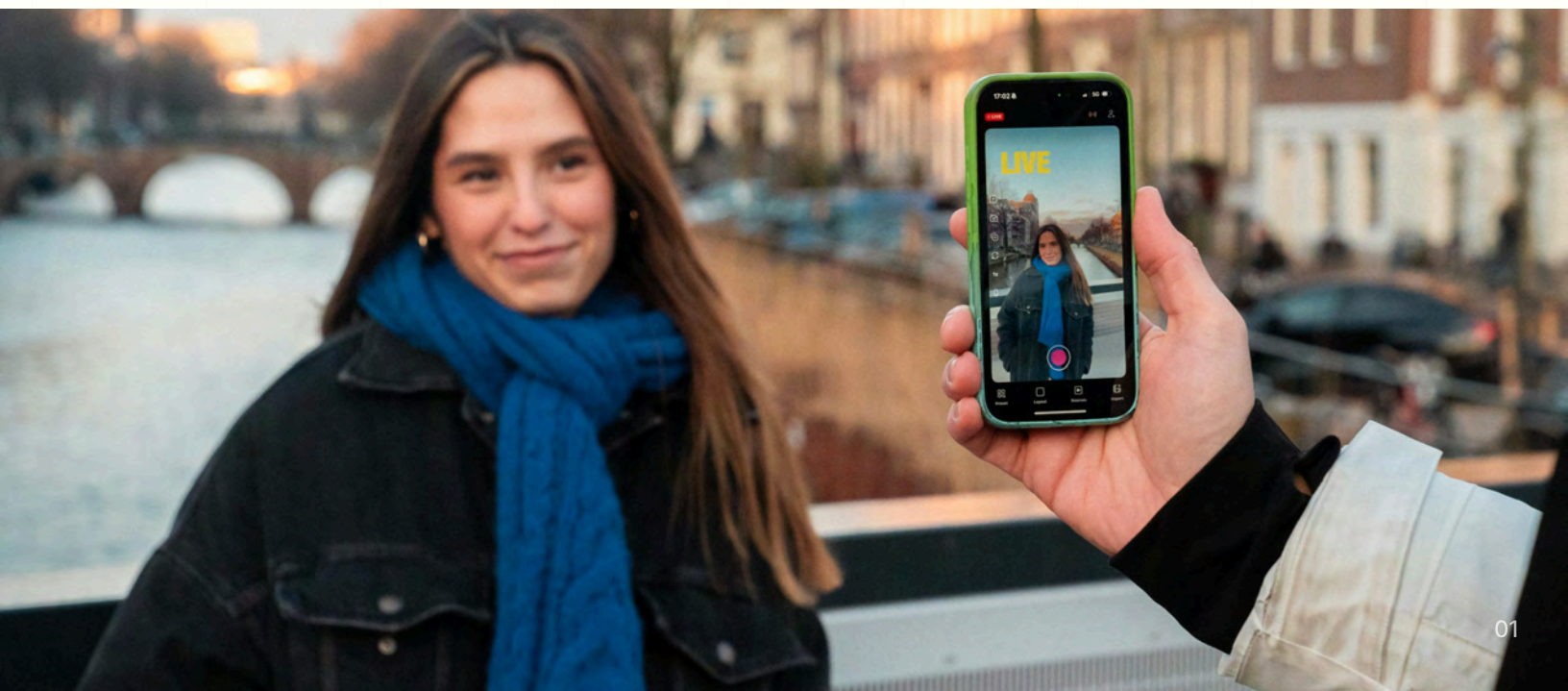


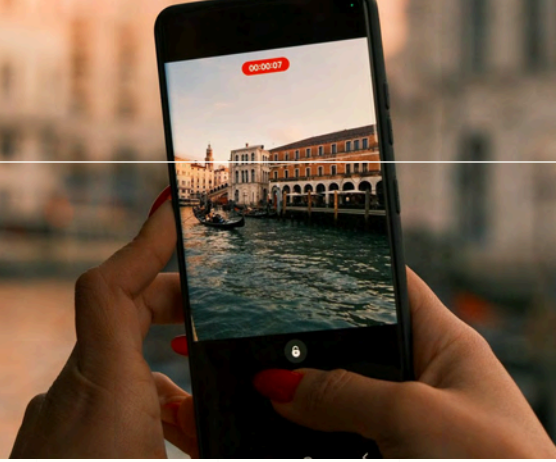
2026 State of Travel Influencer Marketing Report



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Introduction

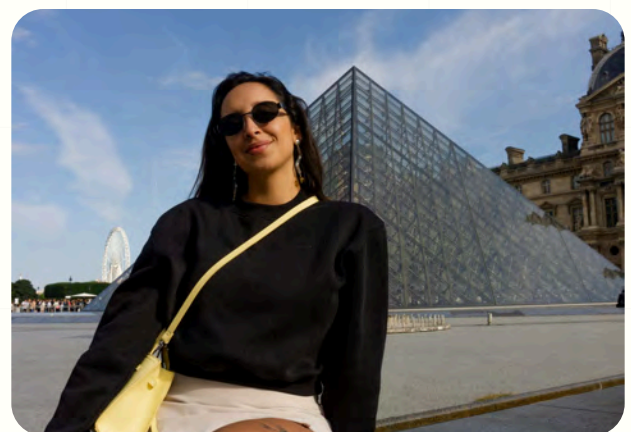
This year, we surveyed 200 destination marketers to understand how influencer marketing is evolving across the travel industry and what is actually working. Our goal was to take the pulse of the industry and create a shared learning moment for destinations navigating a rapidly changing landscape.

The survey explored the full influencer marketing lifecycle, including creator vetting and selection, contracting and management, measurement and reporting, budget allocation, program structure, and the growing role of AI. Respondents represented DMOs and CVBs of all sizes, from national organizations to city-level destinations, with annual influencer budgets ranging from hundreds of thousands to several million dollars. More than half of participants were in senior leadership or executive roles, providing a strategic view of how these programs are being prioritized and scaled.

What we found was clear. Confidence in influencer marketing has reached an all-time high, and travel is no exception. Over 92 percent of surveyed DMOs reported increasing or maintaining their influencer marketing budgets year over year, and 75 percent view influencer marketing as a critical channel for reaching their target audiences over the next three years.

At the same time, how destinations approach influencer marketing is fundamentally changing. Impressions are no longer the primary measure of success. Most marketers now prioritize engagement, while the most advanced organizations are shifting toward metrics that demonstrate real economic impact, including trip planning and downstream behavior.

AI is top of mind across the industry. As discovery becomes increasingly influenced by AI-driven search and recommendations, social and influencer content are taking on a more central role in how destinations remain visible and relevant. This report examines how leading DMOs are strengthening their social strategies to influence traveler decisions earlier and more meaningfully.



Top Takeaways

Tracking Attribution and True Impact Remains the #1 Challenge

All surveyed destination marketers agree that influencer marketing is effective for audience reach. However, the majority still face challenges when it comes to proving the channel's impact in a way that is meaningful to leadership and board decision-makers.

Budgets Are Climbing Because of the Ability to Reach New Audiences

DMOs are increasing their investment in influencer marketing, as survey respondents consistently identified reaching new audiences as the most compelling reason for continued and expanded investment.

The Focus Has Shifted to Engagement

The era of impressions as a primary success metric is fading, with marketers increasingly prioritizing meaningful engagement and real impact over impressions or follower counts.

Marketers Are Underutilizing Influencer Content

Restrictive contracts and siloed workflows limit how influencer content is used, leaving most DMOs activating creator assets only on social instead of extending them across owned, paid, and partner channels.

AI is Changing the Game

With AI summaries changing how travelers discover destinations, DMOs are relying more on social and influencer content, while training teams on SEO to improve video visibility across search and social platforms.



The Attribution Crisis

Confidence in the potential of influencer marketing is at an all-time high, with nearly half of destinations increasing their budgets this year. Yet, this confidence is undermined by a critical vulnerability: most cannot prove the economic return to their stakeholders.

While stakeholders prioritize revenue and bookings, most marketing teams lack the tools to prove anything beyond social engagement. This is the crisis: **76% of destination marketers cite "tracking attribution/impact" as their single greatest challenge.**

The disconnect between "what we spend" and "what we get" is a real threat to budget continuity.

76% of destination marketers say attribution tracking is their #1 challenge

WHAT MARKETERS TRACK

84% Track Engagement

Likes, comments, shares & saves

The data we have

WHAT STAKEHOLDERS WANT

65% Prioritize Economic Impact

Trips planned, travel bookings, economic impact

The data we need

THE REALITY

Only 12% of DMOs successfully track bookings from social

The actual proof

The Missing Piece

The industry has long believed that attribution in social and influencer marketing is impossible because the journey from influencer content to a booking is not linear. That is no longer true.

Forward-thinking DMOs are using technology to connect an influencer's content to a traveler's intent and booking. **Steller Connect** solves the attribution crisis by linking influencer content to trip planning and booking when the traveler is ready.

By utilizing technology that continues the conversation with prospective travelers through marketing automation and retargeting, destinations can finally attribute a hotel booking in July to an influencer campaign months prior.

"If you can track it, you can scale it. When marketers can prove that a specific campaign generated \$500k in economic impact, the conversation shifts from defending the spend to optimizing the investment."

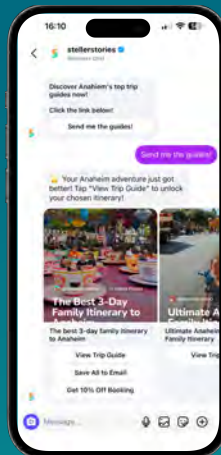
- PETE BRYANT, STELLER

How Steller Drives Trip Planning & Booking from Influencer Campaigns Helping You Prove the Economic Impact of Your Influencer Partnerships

[Book a Demo →](#)

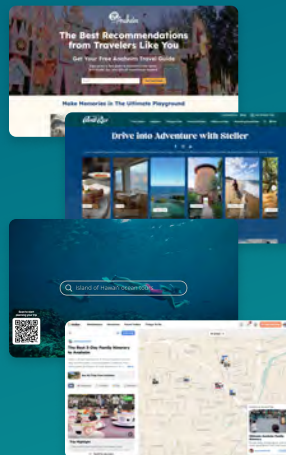

Social First Content

- Brand Post
- Influencer Post



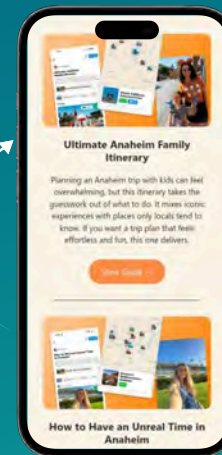
DM Automation to Viewers

Link to Steller Connected Surface and planning tools



Steller Connected Surface

Your website, landing page, Steller itinerary, or DM. Steller establishes a 1-to-1 communication channel.



Behaviorally Triggered Marketing Automation

Push notifications, emails, or DMs keep your destination top of mind and move people from inspiration to traveling to your destination.



Booking & Traveling to Your Destination

Budgets Are Increasing to Capture New Audiences

Despite economic headwinds and measurement challenges, confidence in influencer marketing is solidifying. According to our survey, **48% of destinations increased their influencer budget** this cycle, with another **44% holding steady**. Only a small fraction (7%) saw a decrease.

92% are maintaining or increasing their influencer spend

INCREASED 48.15%

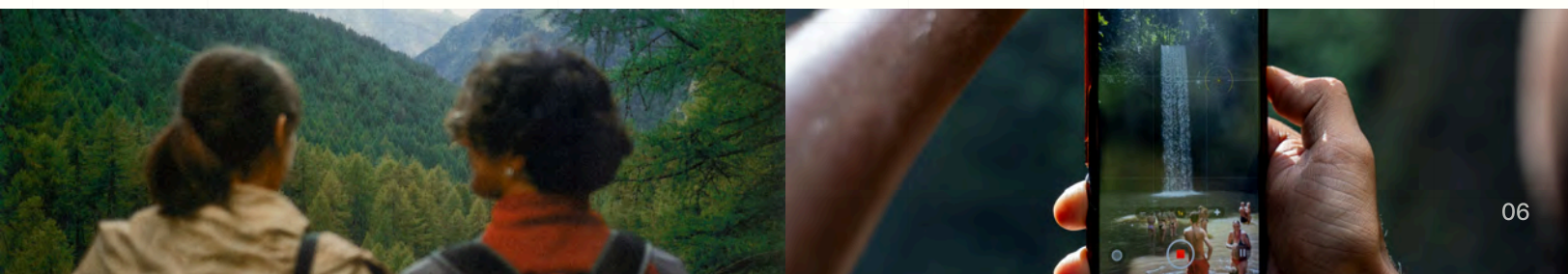
STAYED THE SAME 44.44%

DECREASED 7.41%

While the amount, channels, outcomes, seasonality, and approach vary, our survey found that all DMOs are investing in influencer marketing.

As traditional digital channels become less effective, DMOs are using influencers as a defensive strategy to connect with specific demographics they cannot reach elsewhere.

We're seeing this increase across industries with influencer marketing growing 4X the rate of all other paid media spending. Some of this is because marketers are moving dollars away from channels that are no longer working as well with the advent of AI (paid search), but it's also because influencers simply work. People want to see people like them in your destination, it builds trust and that translates to bookings.



What Are Marketers Spending the Increase On?

In 2026 Destinations are spending on Family Travelers and Adventure Enthusiasts, who tend to book multiple rooms, stay longer, and spend nearly twice as much as solo travelers:



Family Travelers

The top target segment for 2026. DMOs are prioritizing multi-generational travel, requiring influencers who can speak to the logistics and safety concerns of parents.

88%



Adventure & Outdoor Enthusiasts

Targeting active travelers looking for meaningful, nature-based experiences.

84%



Experiential Travelers

Focusing on unique experiences over generic sightseeing.

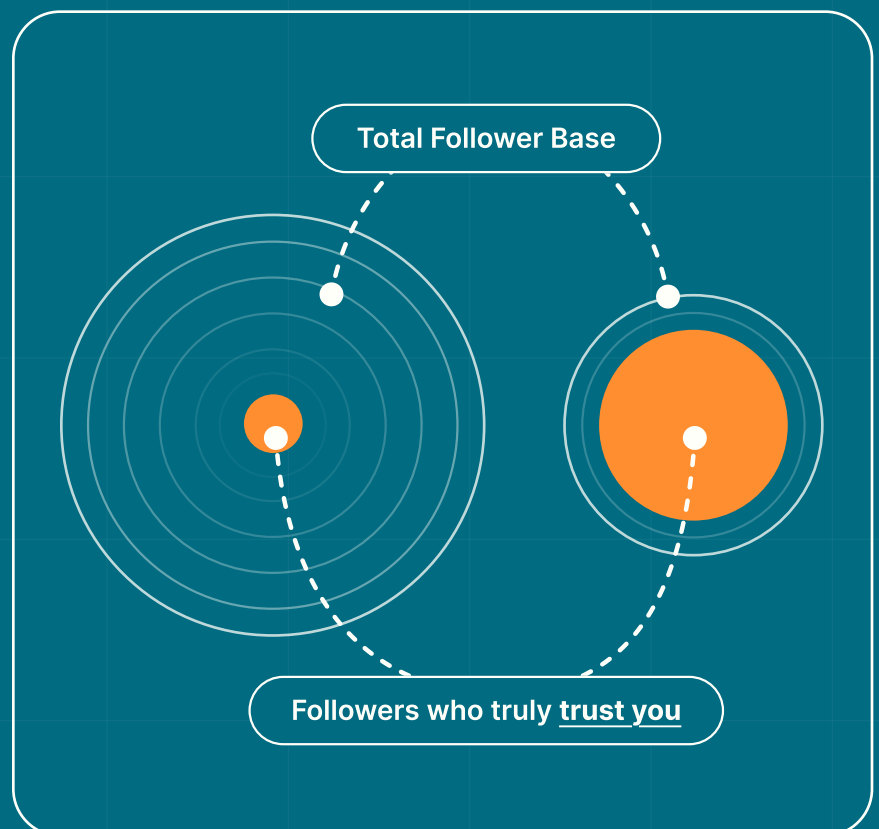
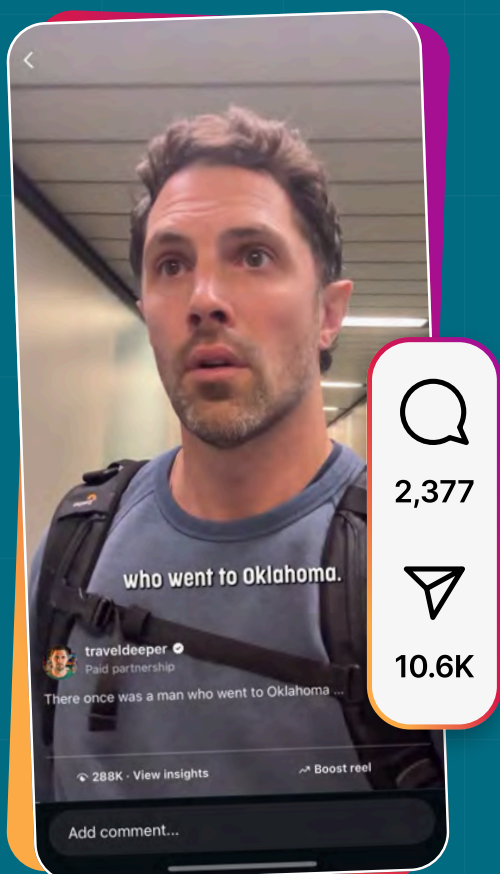
56%

The Focus Shifts to Engagement

Most notable this year is the quiet but meaningful evolution of influencer marketing measurement. The industry first focused on what could be measured, impressions and reach, because those were available not because they showed true impact. This year in the responses we saw a marked increase in brands that stated they had moved away from impression based measurement and said engagement was their top KPI for measuring influencer marketing campaign success.

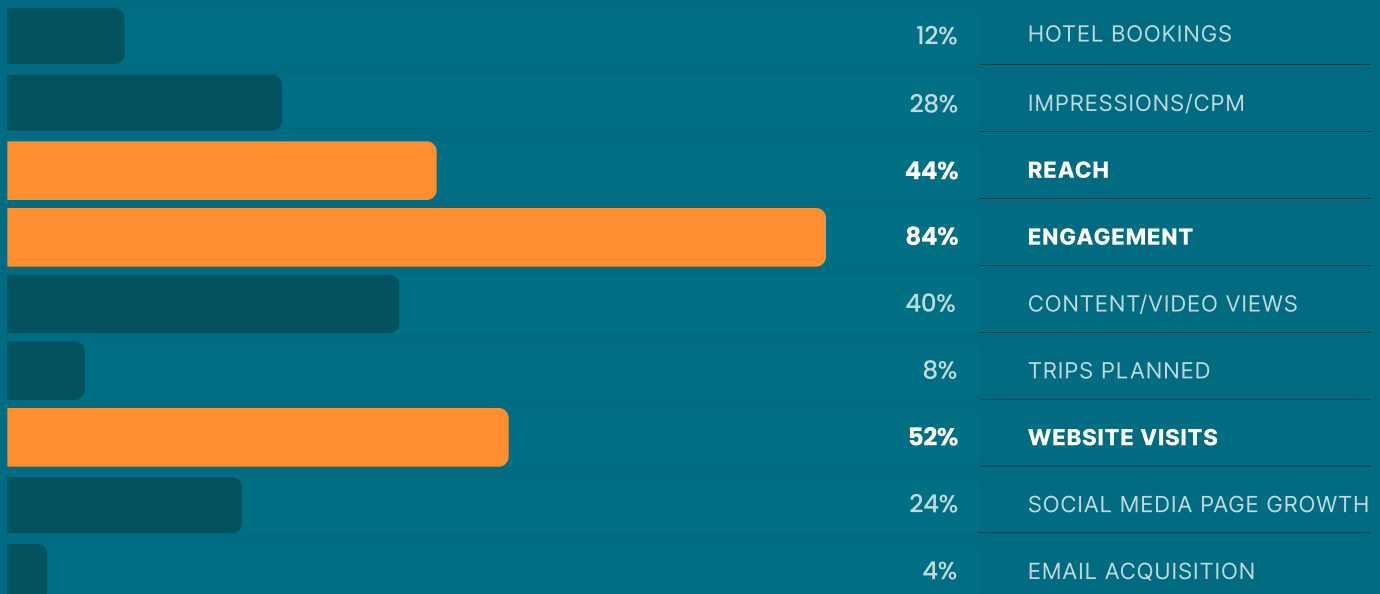
Our survey confirms this: **84% of marketers now list “Engagement” as their top KPI**, nearly triple the number who prioritize “Impressions/CPM” (28%).

Engagement signals resonance and relevance. It shows whether viewers were genuinely interested in the content and the destination, not just exposed to it as they scrolled past. While impressions measure visibility, engagement reflects attention. As a result, destination marketers are increasingly prioritizing influencers who can consistently demonstrate audience resonance through engagement metrics, rather than relying on follower count as the primary selection criteria.



“We’re shifting to focus more on engagement rather than just follower counts. We want to work with influencers who reach an audience that is genuinely interested in learning about our destination and is more likely to travel here.”

- SURVEY RESPONDENT



As one respondent noted, “We prioritize quality over quantity... engagement over big view numbers”. This desire for genuine connection is why DMOs are spending slightly more on influencers than creators—they are paying for the trust, not just the file type.

Influencer vs Creator



Influencer

Someone who posts content to their own social profiles about your destination/brand. You’re paying for content AND access to a new audience.



Creator

Someone who creates content for the brand/destination to post on their own social feeds. You pay for content only.

The Operational Bottleneck

This shift to quality creates a new problem: Time.

Identifying high-engagement, brand-safe creators is significantly more complex than sourcing large, generic audiences. In fact, **56 percent of respondents cite “Finding and Vetting Influencers”** as one of their top challenges.

To maintain control and improve performance, many DMOs have brought influencer discovery and management in house. The result is a highly manual workflow that includes discovery, outreach, negotiation, and contracting. While this approach supports higher-quality partnerships, it is also consuming time and resources that would be better spent on strategy.

At Steller, we manage influencer campaigns end to end. Because our platform connects content and audience engagement to downstream actions like trip planning and booking, we have deep visibility into what actually drives results. This allows us to identify and vet creators who are not only brand-aligned, but who consistently produce high-quality content that resonates with their audience and converts interest into bookings.

56%

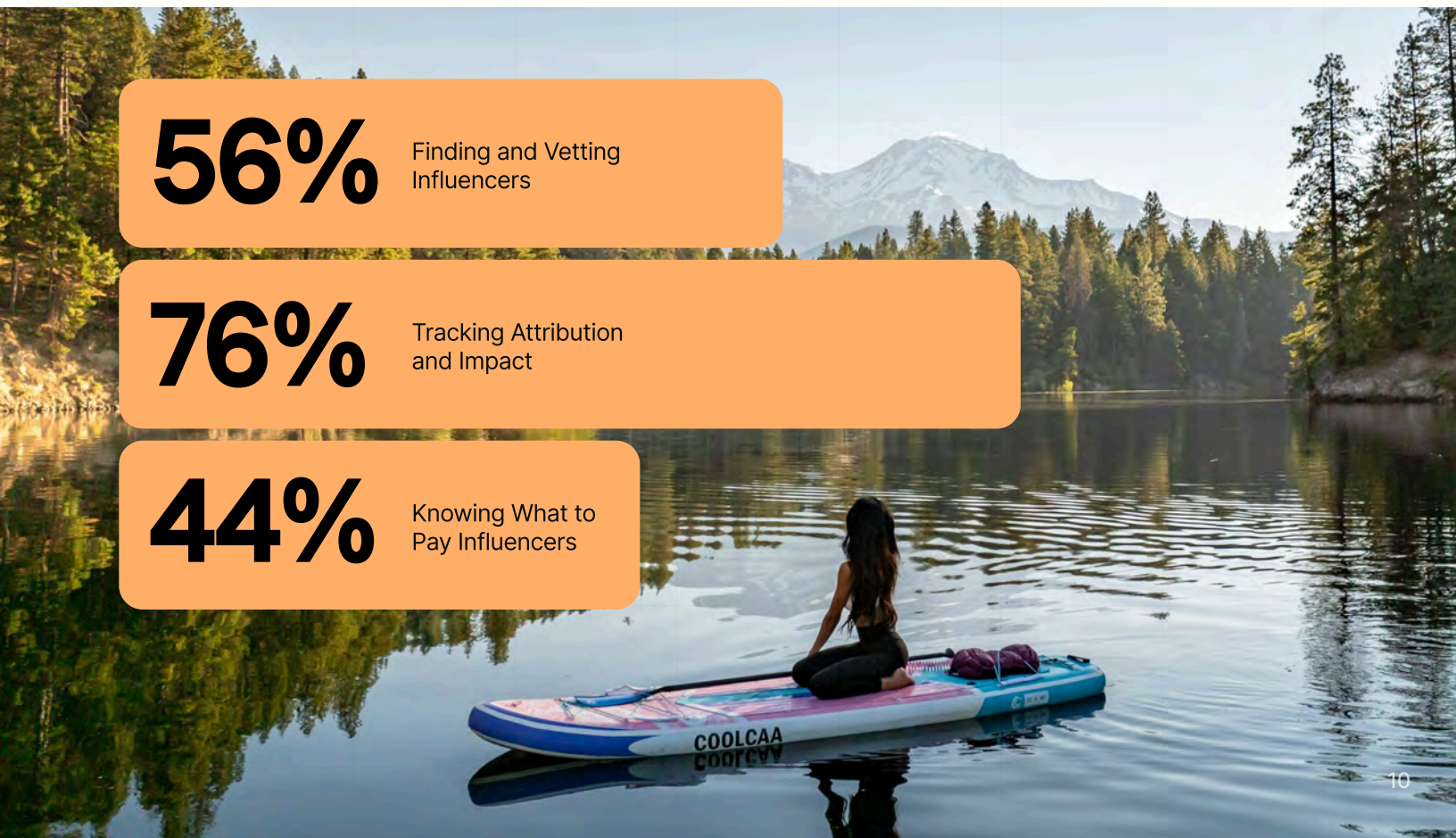
Finding and Vetting Influencers

76%

Tracking Attribution and Impact

44%

Knowing What to Pay Influencers



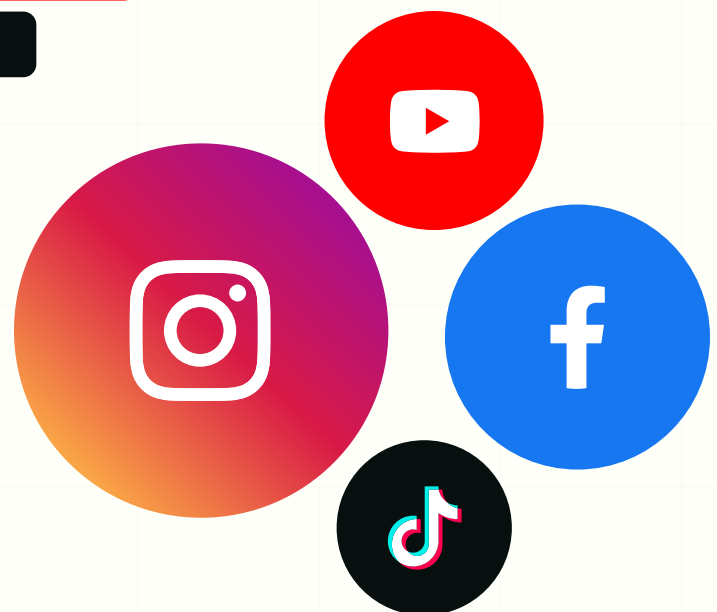
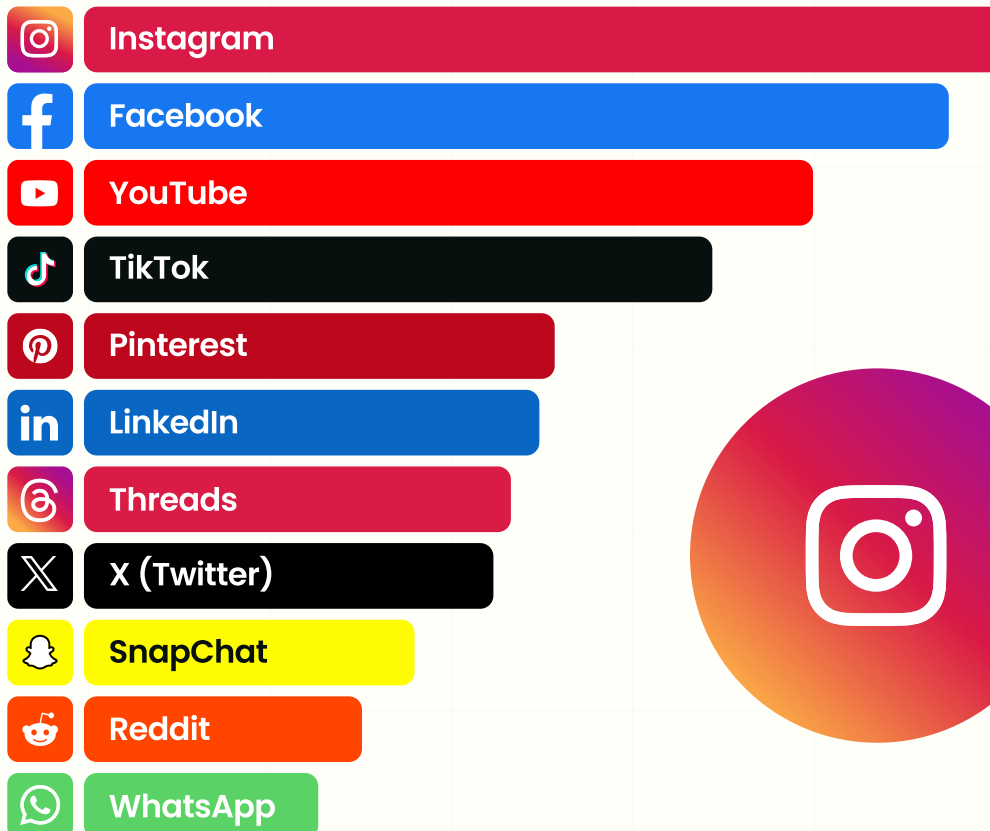
The Platform Reality

While industry buzz often centers on TikTok, the DMO budget is anchored where conversion is proven. Instagram remains the undisputed king, ranking as the most important channel.

Why is TikTok lagging behind Facebook and YouTube? For many DMOs, we're seeing a "Red Tape" issue, where government restrictions prevent tourism boards from fully embracing the platform. This keeps the bulk of the budget focused on platforms like Instagram, where longevity—and legality—are proven. Time will tell if this will change now that TikTok is owned by a US entity.



The Top Social Channels for Destinations



The Underutilization of Influencer Content

Destinations are paying for premium content—stunning photography, drone footage, storytelling video series—and then letting it gather dust after a single social post.

The biggest mistake a marketer can make is to treat influencer content as a disposable asset that lives and dies in a social media feed, rather than as a reusable component of their entire marketing ecosystem.

Our survey reveals a shocking inefficiency in content usage.

32% of DMOs report that they do not use influencer content on any channel other than social.

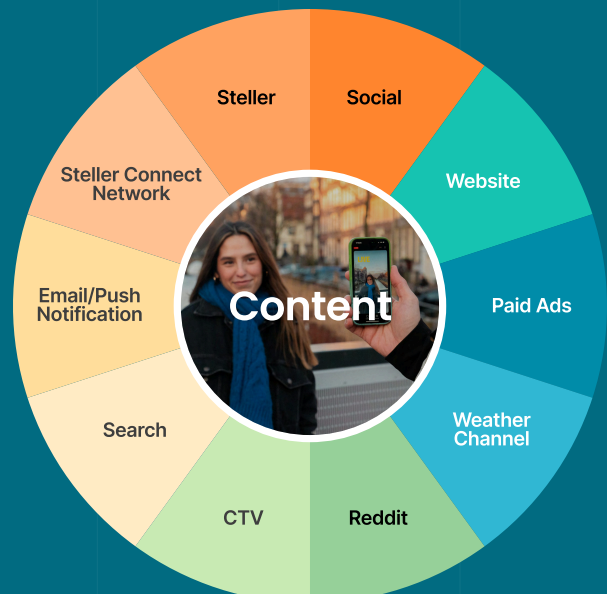
Underutilization is a massive missed opportunity.

- Only 40% repurpose influencer content in paid ads where it's proven to perform better.
- Only 28% leverage it in email marketing where potential travelers need to see themselves.
- Only 12% use it in their trip planner where it could have real conversion power.
- 0% report using it in CTV campaigns where Steller has seen some of the highest ROI.

These are channels where high-trust, authentic creative is proven to lower CAC (Customer Acquisition Cost) and increase conversion. One study found a 4x higher click-through rate and a reduction of cost-per-click by about 50% from influencer-led content. By failing to reuse this content, DMOs are paying premium prices for temporary visibility.

“As we move to working with more local creators, the new audience reach is important. We also only work with creators that can give us **full rights assets to use in other ways** (ads, website, etc).”

- SURVEY RESPONDENT



All Steller campaigns include built in rights to leverage your content through the entire marketing ecosystem.

THE BARRIER

Restrictive Contracts

Why is this content wasted? Often, it comes down to restrictive contracting.

Many agencies charge a percentage of spend to manage influencers, but fail to negotiate full usage rights. This leaves the DMO with a successful social post, but without the legal assets to reuse the content.

By securing usage rights upfront, this high-trust content can fuel the entire marketing stack—including Connected TV (CTV) commercials, paid ads, email marketing, and website itinerary planners. You can turn a single campaign into an evergreen asset library, powering the marketing funnel for months.

THE STELLER PLAYBOOK

How to Maximize Your Assets

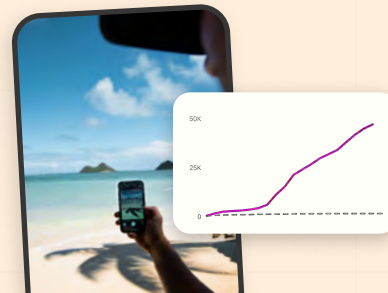


Audit your Contracts

Ensure every influencer agreement includes rights to use the content on paid and owned channels.

Feed the Funnel

Automatically push high-performing Instagram Reels into your paid media ad sets to lower CPA.



Test it on Other Screens

Human created content also performs exceptionally well on the largest screen in the house. CTV ads utilizing influencer content and Steller Connect have driven serious economic impact for our clients.



AI Has Changed The Game



Website traffic and engagement used to be key success metrics for DMOs. The traditional playbook, heavily reliant on website SEO and blog content, is rapidly becoming obsolete. AI summaries and the rapid adoption of AI tools have created a seismic shift in consumer behavior and travelers are often bypassing destination websites entirely. Across all industries, brands are seeing an average 30% drop in organic traffic.

60% of searches now end without a click.

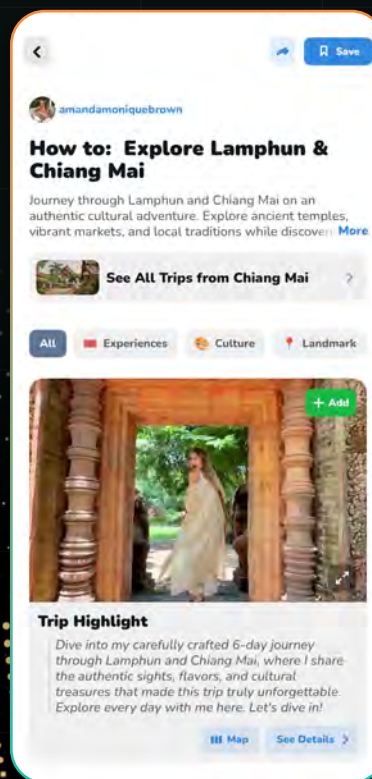
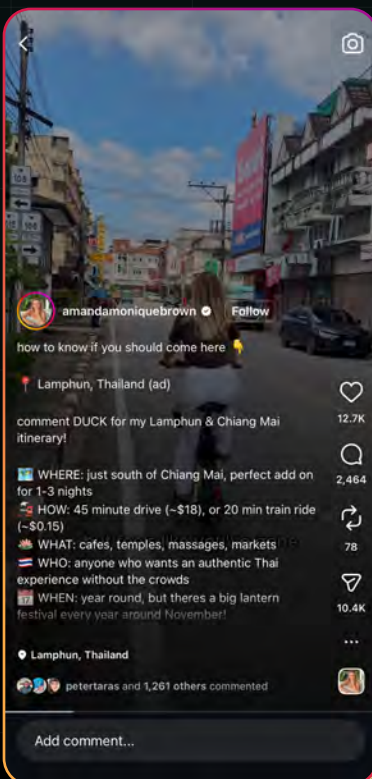
DMOs that fail to adapt to this new reality risk becoming invisible to the next generation of travelers. Our survey, showed 42% of DMOs were actively working on a strategy to prepare for the new normal. According to our survey, **70% of destination marketers agree that social media has become more important for their destination as website traffic decreases due to AI.**

The risk is simple: Invisibility. If a destination's content is on a website where AI summaries and tools aren't driving traffic, it becomes invisible to travelers.

70% say social is more important due to declining website traffic.

Make sure you optimize every piece of influencer content for search (both on and off social) by using SEO optimized captions, geotags, text overlays, and voiceovers. Influencer content is expensive, don't pay for content that doesn't have these things. Text overlays, voiceovers, and decent captions all make your social video content more likely to show up when people are searching on social and Google. You can require those things and still not lose the authenticity of the creator.

Visibility alone is not enough. Content must also be actionable. Destinations that connect inspiration to planning and booking will win. Tools like DM automation and platforms such as Steller Connect allow influencer and social content to link directly to trip planning, lodging, and experiences. When travelers search for a family getaway or nearby escape, the destination that succeeds will be the one with compelling video and a clear, seamless path to book.



The Modern Travel Influencer Marketing Playbook

Don't Just Market Your Destination. Measure It.

The 2026 State of Travel Influencer Marketing report reveals an industry with immense opportunity. The budgets are there. The focus on high-quality families and adventure travelers is clear.

But the execution is lagging behind the ambition.

The problem has been a historical lack of the right tool. Tools to prove value, operate efficiently, and adapt to a rapidly changing discovery landscape. The DMOs that thrive in 2026 will be those who master a new playbook built on measurement, automation, asset maximization, and AI.

The 2026 Checklist



Measure Economic Impact

Move from vanity metrics (likes/impressions) to economic impact data (bookings) that stakeholders desire.



Maximize Every Asset

Repurpose high-performing influencer content to fuel your paid ads, email, and website with high-trust influencer visuals.



Future-Proof for AI

Optimize your stories with structured data to ensure your destination remains visible in the age of AI search.

Turn Viewers Into Travelers

Steller is a MarTech platform that helps travel brands move travelers from inspiration to booking. We help destinations discover and vet influencers who will drive travel, secure usage rights so they can use their content to its fullest, and most importantly, solve the attribution crisis so they can track the economic impact of their social media and influencer content.

Ready to see the true impact of your travel influencer partnerships?

[Book the Steller Connect Demo →](#)

