

Instagram travel influencers coping with covid-19 travel disruption

Abstract

A significant portion of today's marketing is done through social media influencers, that is, through bloggers with established online credibility in a certain area who are recognized and followed by a sizable online audience. In the travel and hospitality industry, the influencer marketing is primarily done through Instagram due to its emphasis on visual images rather than texts. Covid-19 related travel restrictions and shrinking social media advertisement in travel industry have heavily impacted travel influencers, reducing their income and forcing many out of business. We present the outcomes of a study of the top 150 online travel influencers. The analysis is based on 11,000 photographs and texts published in two time periods before and during COVID-19 epidemics. We found that COVID-19 has induced transformative changes in the influencers' online behavior reflected in changes in their posting frequency, themes, and expressed emotions.

Keywords: COVID-19, social media influencers, Instagram, image recognition, content analysis

INTRODUCTION

Out of \$149 billion spent on advertising in the social media in 2021, \$13.8 billion was spent on marketing through the Instagram influencers (Statista, 2021, 2022); by 2025, this market is expected to grow to \$22.2 billion. Indeed, the travel segment seems to be the most conducive to Instagram advertising campaigns based on the highest percentage of the users consenting with advertisement published in a form of sponsored posts (39% in 2019 – Statista, 2019). In addition, the public in general is more likely to react to influencers' rather than the industry posts as evidenced by the engagement rate (number of reactions per one post), which stands at 3.7 for travel influencers (Influence, 2022) vs. 1.48 for travel industry (Social Insider, 2021).

With the world-wide disruptive changes in travel, some of the influencers had to drop from business while the survivors are adapting to the new work and travel environment. We report on the adaptation strategies of the latter ones. Specifically, the study is focused at the top 150 travel influencers as rated by the influencer marketing company Amra & Elma (amraandelma.com) in 2021. The goal of the analysis was understanding of changing in posting pattern, language, locations, and photographed objects before and during the epidemics.

LITERATURE REVIEW

The two-step flow communication theory (Katz 1957) postulates the role of opinion leaders as intermediary agents reprocessing raw primary data into the forms suited for their respective audiences. In this interpretation, the social media influencers are playing the role of opinion leaders, connecting brands to target audiences in authentic way, which predetermines the sky-rocketing interest in influencer marketing.

Travel and hospitality are arguably the heaviest industries hit by COVID-19, cutting on their advertising budgets. On the receiving end of the information flow, the number of travel blog views has dropped, at least at the initial stage of the epidemics (Femenia-Serra et al. 2022), affecting the views-per-post social media metrics. With travel influencers positioned in the middle of this pay-per-view information flow network, the Covid-19 impact has been transmitted to the flourishing tourism social media marketing.

Extremely few authors have studied the implication for the professional travel bloggers. Jones (2021) manually analyzed a sample of 20 US based travel influencers with a collective audience of circa 10 million followers covering their posts from December 2019 to March 2021. The study found that while the number of sponsored posts has dropped in the first quarter of 2020, it bounced back by the end of

2020. Similarly, while the number of reported actual travels dropped initially, it bounced back, even not to the pre-COVID level. Finally, the number of posts depicting influencers staying at home has increased dramatically and stayed same throughout the entire study period.

Femenia-Serra et al. (2022) provided a qualitative study based on the interviews with 12 Instagram travel influencers. The authors manually analyzed the content published during the early onset of COVID-19 (January 1st – June 20, 2020) and found a profound effect of COVID-19 on the influencers that exhibited not only influencers' vulnerability, but also their adapting capacity. The study reported on several coping strategies of the travel influencers expressed in diversification of content to topics such as fashion, food or general lifestyle, an overall shift from tourism to covering other activities, re-publishing photographs from the past trips, switching from the international to domestic travel, and a newly found focus on collaborating with local businesses and DMOs rather than with large international companies. The authors also observed shift to more intimate, emotional content of the influencers' posting. Despite exercising those strategies, the authors reported on a large drop in income with some respondents closing their business.

In differentiation with the abovementioned and few other small sample qualitative studies, the goal of our research is to presents a quantitative “big data” analysis of changes in the online behavior of the highest-tier segment of social media travel influencers over the COVID-19 period. Further, we differentiate between the bloggers successfully overcoming the challenges presented by pandemics travel restrictions and those who largely lost support of their sponsors. Methodologically, we demonstrate application of contemporary data mining methodologies such as image recognition, topic modeling, and neural network embedding to analyze tourism related data.

METHODS

For each influencer, a random sample of 100 Instagram posts was selected to represent pre-COVID (2018-2019) and post-COVID (March 2020 and later) posts in equal proportion. When a sample post contained multiple images, only one image was collected. After removing the influencers not present in our database, circa 11,000 posts shared by 140 influencers were investigated. Note that some influencers heavily reduced the number of their postings over COVID period, leading to fewer than 100 posts extracted.

The analysis includes:

- general descriptive analysis of changes in posting frequency, hashtag use, mentions, and reactions;
- recognition of sponsored postings;
- natural language processing identifying changes in sentiment, emotions, and content of the postings based on automated topic modeling;
- image recognition with Google Vision AI detecting of objects and scenes; and
- neural network embedding and topic modeling to detect common topics of photographs.

FINDINGS

Very few bloggers explicitly mark their sponsored postings as required by law of e.g. USA; still, their number has reduced from 4.6% to 2.9%. Majority of influencers however utilize business mentions and use terms such as "colab" without explicitly stating the sponsorship. We found that the number of such posts changed little and constitutes a third of all posts. Accounting for an overall 41% mean reduction in posting frequency (median reduction 64%), conservation of the percentage of the sponsored postings translates into a dramatic drop in payed content for the majority of influencers. Notably, the mean number of comments per post has increased from 45 to 75, indicating continued interest from public.

Meanwhile, a small but distinct minority radically increased either their posting frequency or sponsorship per a post, evidently demonstrating a successful adaptation (Figure 1). We found that the most successful bloggers (strategy 3) found opportunities to post images of sunshine, beach destinations where small tourism businesses were hit the most. Meanwhile, many of surviving bloggers (category 1) switched to fashion and photographing their life at home.

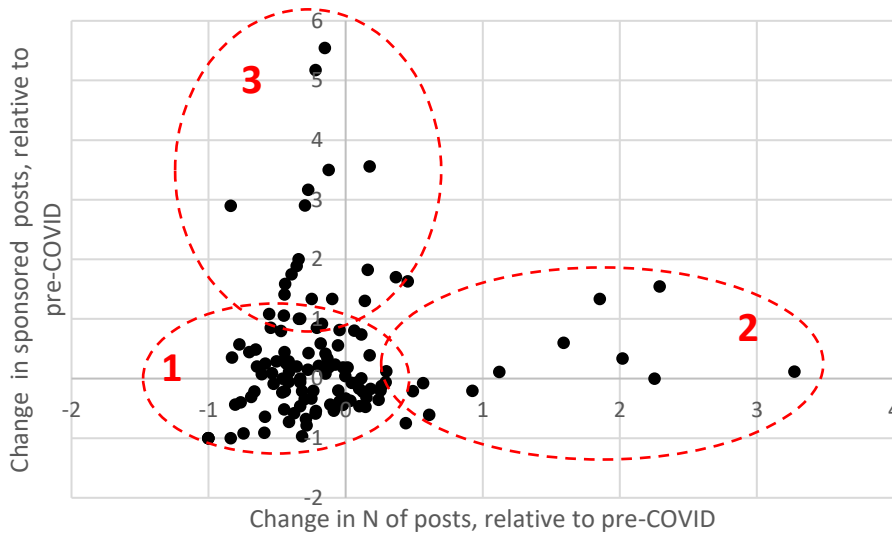


Figure 1. Three strategies of influencers' adaptation: (1) survival (reduction of posting with little change in sponsored content); (2) extensive adaptation: compensation through higher posting activity; (3) intensive adaptation: compensation through increasing hidden sponsorship.

CONCLUSIONS

In many aspects, our findings differ from earlier reports. We explain it with longer time period of data collection allowing travel bloggers to adapt to changes in tourism environment and with a large sample better representing top travel influencers. Most of the influencers reduced their online activity and hence the sponsorship. Their photographs reflect a switch to isolated life with reduced images of outside activities and populated locations such as streets and beaches. Few influencers however have increased their online activity, reconnecting to the newly found opportunities during pandemic and increasing perceived value of their work.

Our findings contribute to understanding of behavior of top travel influencers in social media. The study also contributes to the methodology of the user generated content research in tourism and to decision-making improvements in tourism marketing. The report will include additional findings on influencers' adaptation strategies focusing on the differences between the apparent winners and losers of the epidemic-induced transformational change of the travel influencer industry.

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