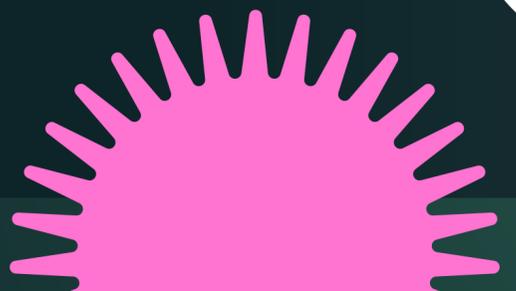
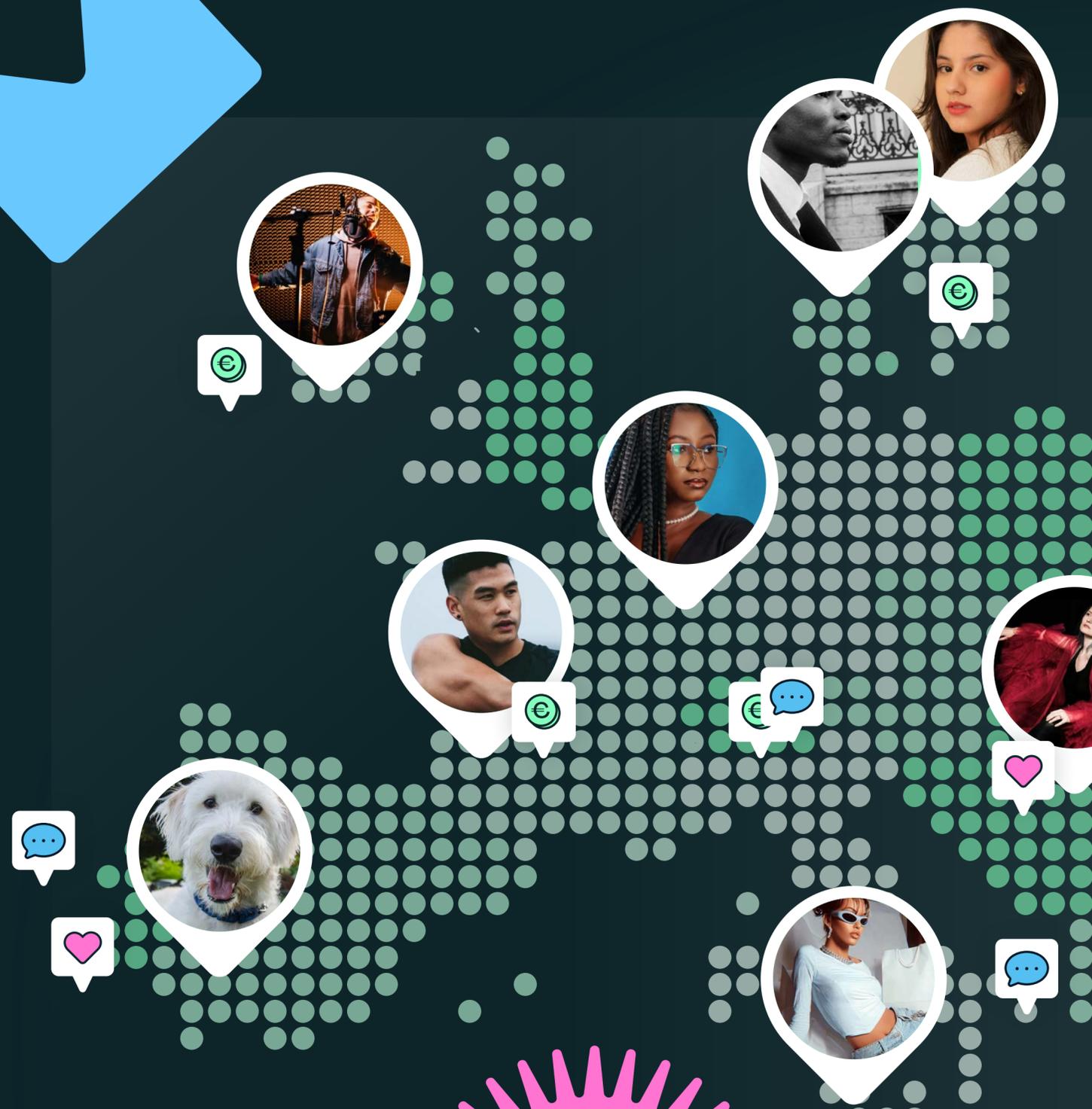


THE STATE OF INFLUENCER MARKETING IN EUROPE 2025

2nd
Annual
Edition

The European Benchmark for Influence



SNAPSHOT OF THE EUROPEAN INFLUENCER MARKETING LANDSCAPE

In-house momentum

89%

of brands manage all or part of their influencer marketing in-house.

61%

of brands rely on agencies.

Where budgets are going in 2026

Most marketers (55%-62%) plan to increase investments in paid media, long-term partnerships and UGC in 2026,

55%

UGC

62%

Paid media

59%

Long-term partnerships

with just 8% or less planning to pull back spend in these areas.

Paid media

8%

Long-term partnerships

8%

UGC

7%

Affiliate marketing slows down



Affiliate marketing is being deprioritised: only 23% expect to raise spend, while 34% plan to cut budgets.

Influence becomes a core marketing pillar.



49%

of brands integrate it with PR/comms, and 45% link it to broader brand campaigns.

EUROPE'S INFLUENCER MARKETING IN 2025 — BY THE NUMBERS.

Discover how brands and agencies invest, collaborate, and evolve as influence becomes a core growth driver across every market. From shifting budget priorities to the rise of TikTok and the growing focus on ethics, these figures capture the state of influence today and what's coming next.

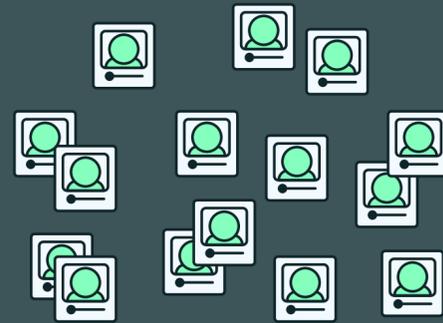


SNAPSHOT OF THE EUROPEAN INFLUENCER MARKETING LANDSCAPE

Creator Relationships & Volumes



60% of brands, and 78% of all marketers, work with fewer than 100 KOLs per year, emphasising long-term relationships and greater selectivity.



72% of brands and agencies increased the number of KOLs they worked with in the past year, and 75% plan to do so again in 2026, including 17% expecting growth above 50%.

64%

of brands mostly or always work with new influencers.

86%

of marketers collaborate with micro-influencers.

Opportunities & Outlook



Short-form video, paid media integration, and authentic, values-driven creators are seen as the biggest opportunities for 2026.

39%

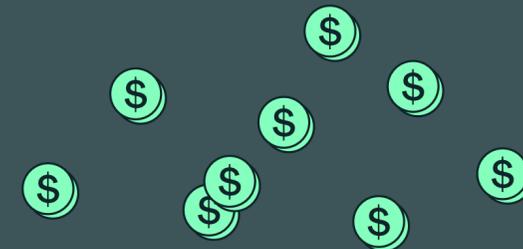
of marketers use influencer marketing tech tools, with adoption rising alongside company size.

Platforms



Instagram remains the preferred social network, used by 93% of marketers (up from 89% in 2024). TikTok follows at 79%, up from 64%.

Budgets & Investments



72% of brands plan to increase influencer marketing budgets in 2026, up from 54% last year. 47% expect growth of 10–49%, and 6% above 50%.



The median annual spend sits at €175K, with 11% investing €1M+ in influence.

SNAPSHOT OF THE EUROPEAN INFLUENCER MARKETING LANDSCAPE

Content Formats



Content co-creation is now the top activation format, used by 64% of marketers, signalling stronger brand-creator ties.

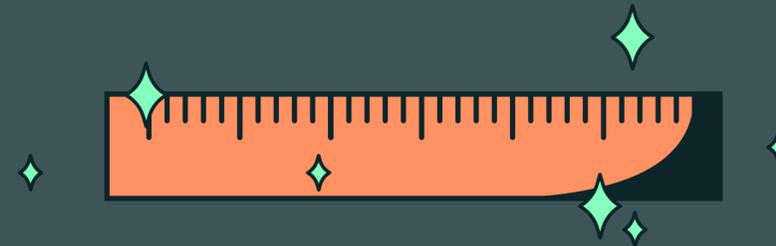


Gifting campaigns are losing traction, used by just 28% of marketers overall.



Sponsored posts remain popular with 61% of marketers, used across all funnel stages.

Challenges



Measuring ROI remains the top challenge but is easing, cited by 37% in 2025, down from 50% in 2024.

1/3

Rising costs, opaque fees, and unreliable data each trouble about a third of brands, stable year on year.

Compensation & Contracts

74%

of marketers still pay influencers a fixed fee per post; 31% use long-term contracts.

Ethics, Regulation & Responsibility

68%

of marketers cite compliance with ad regulations as the most important ethical condition for working with influencers, followed by 61% prioritising corporate ethics and disclosure.



25% value influencers who take a stand against bullying and discrimination.

Continue reading to explore the full insights, trends, and country-specific findings shaping influencer marketing in 2026.



THE STATE OF INFLUENCER MARKETING IN EUROPE 2025

Inside Europe's evolving creator economy: smarter investments, stronger impact, and sustainable growth.

The year ahead: creativity meets performance.

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“As with marketing, a 360 view and full integration of all platforms is one of the keys to success. Same with the integration of these individuals, their work and their channels. The more integrated we are with creators, the more efficient and surgical we can be.”

Campaign Director, IT/SaaS/Telco, budget spend €75K–€100K, Spain

INTRODUCTION

Influencer marketing in Europe has entered a new era. One defined by smarter investments and stronger connections between creativity, performance, and purpose.

Kolsquare's State of Influencer Marketing in Europe 2025 captures this evolution across eight key markets, drawing on insights from over 600 brands and agencies. The findings paint a clear picture: the European influencer marketing industry is growing up fast, and marketers are looking to 2026 with determined confidence and ambition.

After a year of recalibration, budgets are on the rise again. The large majority of marketers (74%) plan to increase investments in 2026, with the biggest growth expected in user-generated content (UGC), long-term partnerships, and paid media amplification.

This signals a maturing ecosystem where brands are moving beyond one-shot campaigns to build lasting, scalable collaborations with creators. The focus is shifting from presence to performance, from exposure to engagement that drives measurable results.

“Short-form video dominates attention and engagement, while integrating creator content into paid media expands reach and performance. At the same time, audiences are demanding authentic, values-driven collaborations. It reflects how influencer marketing is maturing.”

Head of Digital Communication & Content, NGO/
Nonprofit, budget spend €75K–€100K, France

Across Europe, brands are also diversifying how they activate creators. Sponsored posts continue to dominate top-of-funnel strategies, particularly in the UK and Italy, while France and Spain lead in experiential and collaborative formats that foster deeper brand affinity.

Mid-funnel efforts increasingly centre on content co-creation, now the most common format in nearly every market. UGC used in paid campaigns is gaining traction in the UK and Spain, where data-driven approaches are most advanced.

Meanwhile, Germany and France stand out for structured, performance-led management, highlighting a more analytical mindset taking hold across the continent.

The scale of activity is also expanding. Nearly three in four brands increased the number of creators they worked with over the past year, and more plan to grow those numbers again in 2026.

Partnering the growth, measurement and accountability are evolving. Engagement metrics remain the leading success indicator, but ROI and conversion tracking are rising fast and fewer brands than in 2024 nominate measuring ROI as a pain point.

Europe's evolving regulatory environment and the industry's drive to promote responsible influence are bearing fruit. Two-thirds of European marketers say ethics, adhering to advertising rules and aligning with values are central to successful influencer partnerships.

This year, we also asked marketers about how they are using dedicated influencer marketing tech. More than a third of marketers (39%) report using a dedicated influencer marketing platform, with the main usages around influencer discovery, audience vetting, and reporting and performance tracking.

“AI is necessarily impacting ALL aspects of marketing, so I expect at a minimum it'll make the management of influencer marketing more efficient. Authenticity is a macro trend that will only continue growing. Social selling is growing rapidly and I only expect it to increase.”

Global Senior Marketing Director, Beauty & Cosmetics,
budget spend £3.01M–£5M, United Kingdom

But the perceived barriers to using tech (complexity, lack of internal expertise and resources) highlights a crucial point: the European influencer market still has significant room to mature. As use of data-driven tools to scale influence increases, so too will precision and impact, enabling more business to build sustainable growth.

The picture presented by the State of Influencer Marketing in Europe 2025 is of a market that is maturing fast but still has much room to grow. Budgets are increasing, opportunities are there for the taking, and the industry is aligning around authenticity, impact, and accountability.

As 2026 approaches, marketers are harnessing the power of influence with purpose, precision, and long-term vision.



Sophie Douez
Journalist,
Kolsquare

METHODOLOGY

The 2025 edition of The State of Influencer Marketing in Europe was conducted by Kolsquare in partnership with NewtonX, expanding the previous scope to include both brands and agencies across seven European markets.

A total of 613 qualified decision-makers participated in a quantitative online survey, representing senior professionals such as CMOs, Heads of Influence, PR Directors, and Social Media Managers.

All respondents had a minimum of two years' experience managing or executing influencer marketing campaigns and held decision-making authority over their company's strategy, budgeting, or partner selection.

Participants represented medium to large organisations across a wide range of sectors, including Marketing & PR, Fashion & Beauty, Retail, Media & Entertainment, IT/SaaS/Telco, and Food & Beverage, reflecting the broad application of influencer marketing in Europe.

The questionnaire explored budget allocation, campaign objectives and formats, adoption of technical tools, measurement frameworks, and ethical practices.

Fieldwork was conducted between September and October 2025, using verified professional sampling to ensure robust and representative results.

The study provides an updated pan-European benchmark of influencer marketing maturity, challenges, and emerging trends as the industry moves into 2026.

Note on the data: Due to the limited data samples collected for the Nordics and Benelux, the insights in this report offer a directional overview rather than a comprehensive market analysis.

12 Countries



613

Decision makers
in Influencer Marketing

397

Brands (64.8%)

216

Agencies (35.2%)



MEET THE EUROPEAN INFLUENCER MARKETERS:



UNITED KINGDOM

THE CONFIDENT ACCELERATOR

Scaling fast and with conviction:

The UK is the most bullish market in Europe, with 27% of brands expecting to significantly increase (50%+) the number of KOLs they work with in the next 12 months, compared to a market average of 17%. In total, 84% of brands and agencies expect to increase the number of KOLs they collaborate with, and 81% anticipate budget growth in 2026, both above the European average of 74%.

Strong tech adoption but room to grow:

A third of UK brands report using a tech platform to manage influencer marketing strategies, slightly above the market average. The UK is among the top countries for tech platform adoption, particularly among mid- to large-sized companies, alongside Germany.

Polarised spending habits:

Spending in the UK is highly polarised, with 28% of brands and agencies investing less than £75K, while 14% (tied with Germany) spend upwards of £1M. This reflects a diverse market that combines smaller, agile players with well-funded, established brands.

Micro-influencer momentum:

The UK is all-in on micro-influencers, with 93% of brands and agencies working with them, compared to the 86% market average. This points to a mature focus on authenticity and community-driven engagement.

“Customer attention spans: longer full videos on platforms like TikTok aren’t doing as well, and with the new subscription models with content being gated, you really need to track the right balance.”

Head of Paid and Digital, Banking and Insurance, **budget spend £1.01M–£3M**, UK



MEET THE EUROPEAN INFLUENCER MARKETERS:



GERMANY

POWER PLAYERS WITH A PLAN

In-house control:

Germany shows the strongest preference for in-house management of influencer marketing (21%), with limited reliance on agencies or tech platforms. Only 15% of German marketers report using a tech platform to support influencer activities, well below the market average of 39%.

Partnerships on the rise:

German brands and agencies are the most likely in Europe to boost investment in UGC (61%) and long-term partnerships (65%), signalling a strategic shift towards sustained value creation.

Lower emphasis on ethical criteria:

Perhaps surprisingly, German marketers place less importance on ethical and regulatory compliance when selecting KOLs compared to other countries. They are also the least likely (15%) to require influencers to take a stand against bullying and discrimination.

Big budgets, measured growth:

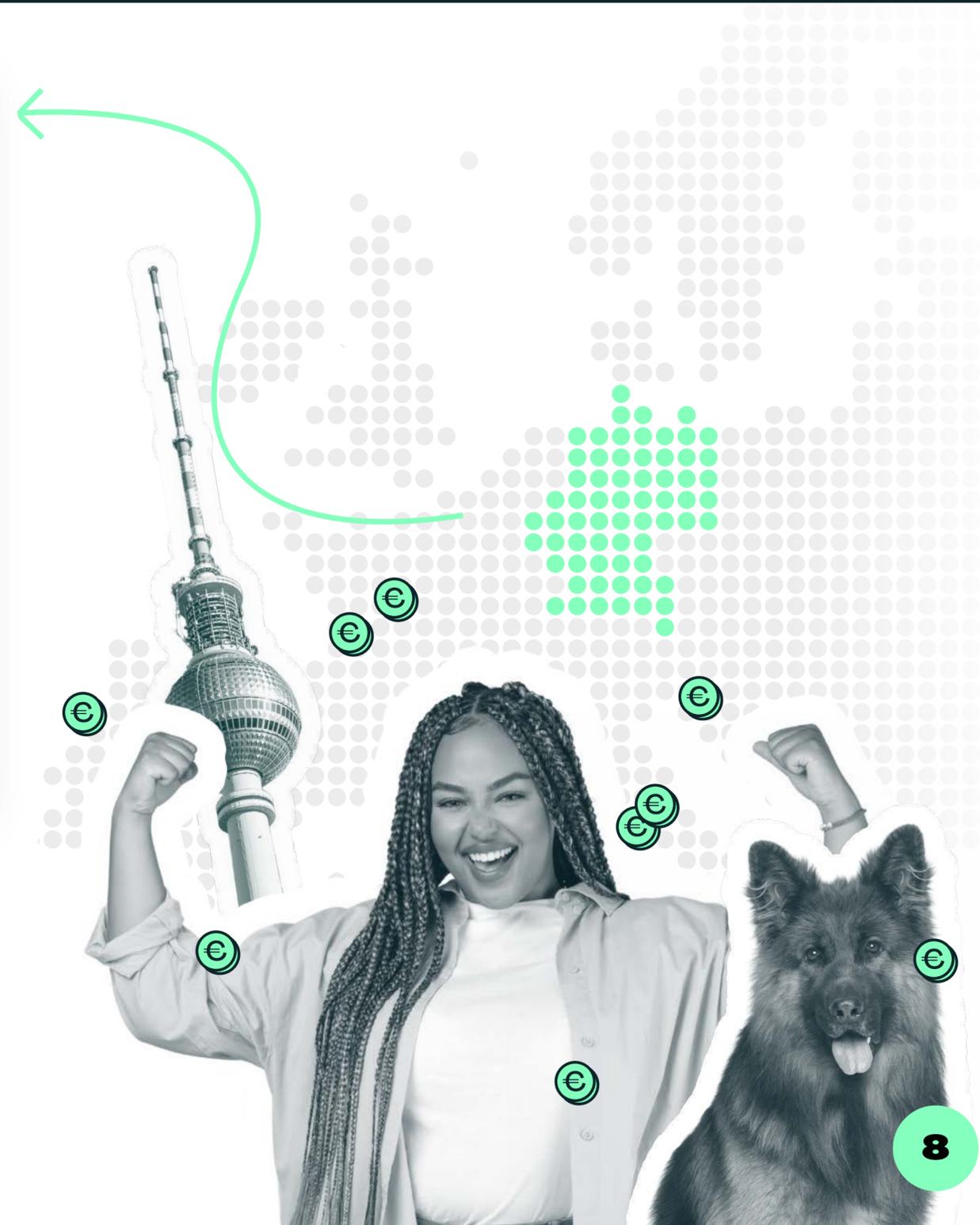
Germany stands out as Europe's biggest spender in influencer marketing, with the highest share of brands and agencies investing €1M+, and a further 25% spending between €200K and €1M. Growth expectations are robust: 74% of marketers expect budgets to increase in 2026, and 73% plan to increase the number of KOLs they work with in 2026.

Balanced KOL mix and performance focus:

German marketers' choice of influencer types mirrors the European pattern, with 86% working with micro influencers and 65% with macro influencers. Their top challenge is accurately measuring ROI (44%), followed by rising costs (36%), both tracking above the market average.

"More companies are entering online marketing, AI is generating more content, and users are becoming increasingly desensitised due to the growing flood of formats and providers. Therefore, content must become faster, more authentic, and cheaper."

Senior Advisor, Growth Marketing, Retail, budget spend €100K–€150K, Germany



MEET THE EUROPEAN INFLUENCER MARKETERS:

THE BALANCED INTEGRATOR

Champions of the hybrid model:

France leads in hybrid influencer marketing setups, with 44% of brands managing campaigns in-house while also collaborating with agencies. It also ranks first for tech adoption, with 49% of marketers using a dedicated influencer marketing platform, sitting 10 points above the market average.

Ethical leadership and regulatory vigilance:

French marketers are among the most demanding in Europe when it comes to ethics and compliance. They are more likely than other countries to require that KOLs stand up to bullying and discrimination (36%), avoid promoting sensitive or controversial products (70%), and adhere to all advertising rules (76%).

Cautious growth outlook:

French brands and agencies are less optimistic about budget increases, with 68% expecting growth in 2026 compared to the market average of 74%, and 13 points lower than the UK. Only 8% expect to significantly increase the number of KOLs they work with, well below the market average of 17%, although 40% forecast a moderate increase (10–49%), slightly higher than the European average of 35%.

Happy spenders:

France leans towards higher budgets, with 30% of brands and agencies spending between €200K and €1M, and 9% spending over €1M on influencer marketing.

“With how many creators are on the market, there are now more opportunities to find the perfect fit for the company/product and maybe have a long-term relationship with authentic creators, also leading to a better standardisation of the industry.”

Community Manager/Social Media Manager, Media, Gaming, or Entertainment, budget spend €200K–€500K, France



MEET THE EUROPEAN INFLUENCER MARKETERS:

THE RELATIONSHIP BUILDER

Agency-driven approach:

Spain relies strongly on agency collaboration, with 69% of brands using agencies in some capacity. Only 7% manage influencer marketing solely in-house with tech platform support, placing Spain 10 points below the market average and making it the least likely market to rely on this setup.

Focus on long-term collaborations:

Spanish brands favour ongoing partnerships, with 46% prioritising long-term collaborations compared to 32% preferring short-term campaigns. This reflects a clear intent to build sustainable relationships rather than one-off activations.

Micro and macro-influencers lead the way:

Spain shows a strong reliance on micro-influencers (89.7%) while also displaying a high usage of macro-influencers (70%) compared to other countries.

High budget confidence, limited resources:

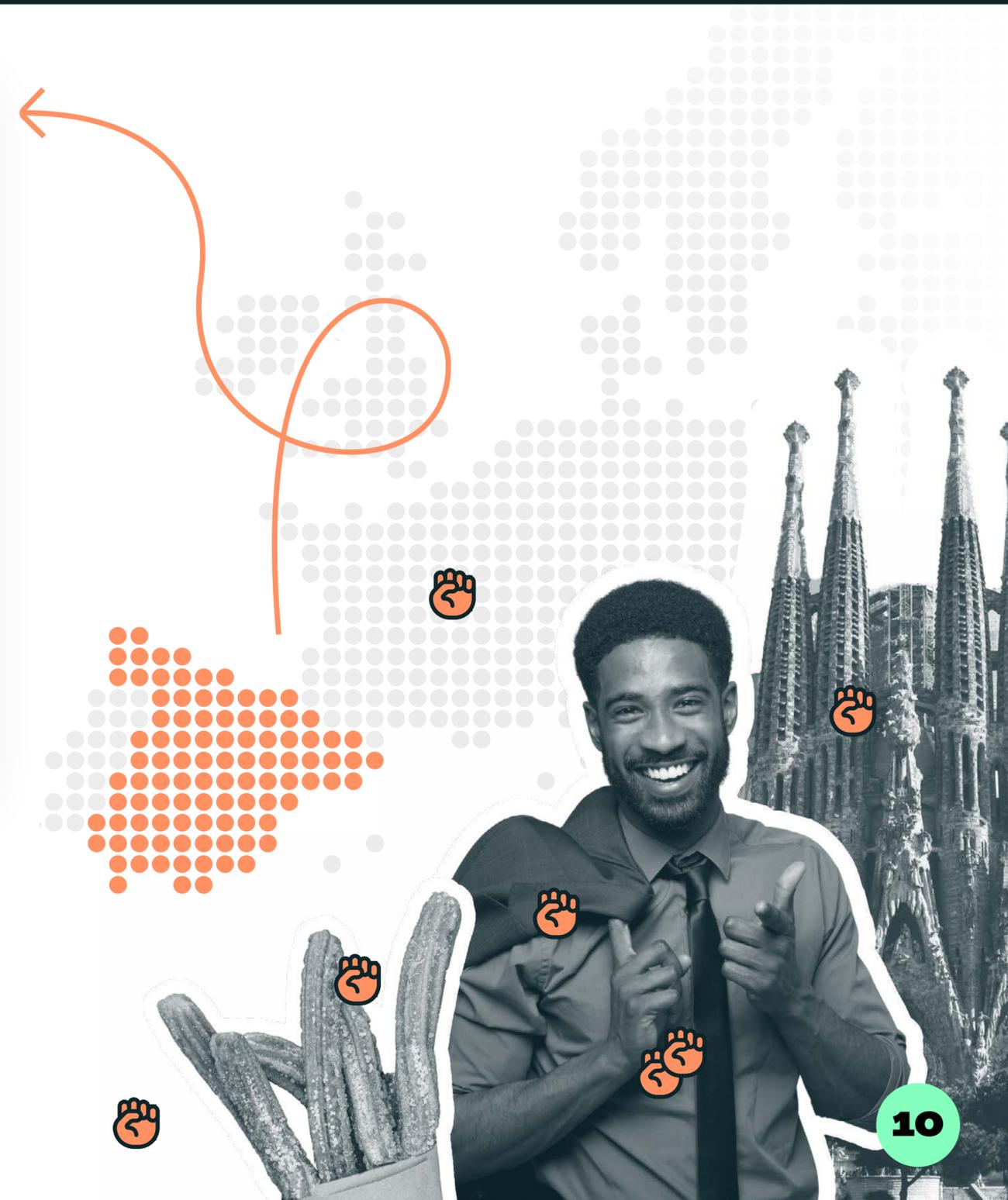
A striking 80% of marketers in Spain expect influencer marketing budgets to increase in 2026, above the market average. Yet, budgets remain modest, with the highest proportion of brands (18%) spending under €25K, showing a market eager to grow but still constrained financially.

Ethical and creative balance:

Spanish marketers nominate balancing influencer freedom with brand control (38%), followed by rising costs (36%) as top challenges. When selecting KOLs, compliance with corporate ethics (69%) and adherence to advertising regulations rank highest. Moreover, 30% value influencers who stand up to bullying and discrimination, five points above the market average, underlining Spain's ethical commitment within creative boundaries.

“The big opportunity lies in how all these factors intersect: hyper-connected audiences, technologies that scale campaigns, creators with a more genuine voice, and models that make them more sustainable. It’s a cocktail that, if mixed well, becomes a unique opportunity.”

Head of Marketing and Communications, Marketing Agency, budget spend €75K–€100K, Spain



MEET THE EUROPEAN INFLUENCER MARKETERS:

THE TECH-SAVVY AMPLIFIER

Agency-heavy, tech-forward:

Italy records the highest agency involvement in Europe, with 64% of brands using agencies in some form. At the same time, 44% of Italian marketers use a dedicated influencer marketing tool, five points above the market average — showing a market that blends human expertise with technological support.

Performance mindset:

Measuring ROI is the top challenge for Italian marketers (43%), well above the market average of 36%, followed by balancing influencer freedom and brand control, highlighting a drive for measurable, yet creative, impact.

Balanced campaign strategies:

Italian brands strike a balance between short-term (32.81%) and long-term (43.75%) collaborations, but stand out for paid media amplification (57.81%), with influencer content frequently boosted through paid channels to maximise reach and visibility.

Ethical focus and bullish budgets:

Italian marketers prioritise corporate ethics (69%), compliance with advertising regulations (66%), and transparency (58%) when selecting influencers. Italy is also confident about budget growth, with 78% expecting increases and 31% forecasting rises of over 20% (above the 27% market average). Most brands operate within mid-level budgets (€100K–€500K, 41%), reflecting strategic rather than excessive investment.

“Integration of influencer content into paid media campaigns is an opportunity because ads, the way they are especially in my market (music) are not effective. Moreover, the artists are not always available to create content, and we need content in line with the platform we use. A long-term partnership can build a sense of trust.”

Senior Paid Media Manager, Media/Gaming/Entertainment, budget spend €50K–€75K, Italy

MEET THE EUROPEAN INFLUENCER MARKETERS:

 **BENELUX** (Netherlands, Belgium, Luxembourg)

 **NORDICS** (Denmark, Sweden, Finland, Norway)

THE PRAGMATIC BUILDERS

Benelux brands expect moderate budget growth, focusing on scalability and measurable impact. High interest in UGC activations and affiliation models reflects a test-and-learn, performance-driven mindset. Around a third of brands use a tech platform, showing structural maturity and reliance on data-led decision-making. Marketers strongly favour micro-influencers and prioritise transparency, regulation, and brand safety across collaborations.

“I think we haven’t seen the true potential of influencer marketing when combined with AI yet. We’re at the beginning of a very interesting time. But with that will come higher levels of standard practice and ‘rules’. We know people love to hear the opinions of others they trust.”

Head of Marketing, IT/SaaS/Telco, **budget spend €10K–€25K**, Netherlands

Note on the data: Due to the limited data samples collected for the Nordics and Benelux, the insights in this report offer a directional overview rather than a comprehensive market analysis.

THE STEADY STRATEGISTS

Nordic brands show measured optimism, with budget growth expectations 15 points below the market average. They plan to increase investment in long-term partnerships and performance-based formats, while paid media amplification is growing steadily. About one in three use a tech platform to manage influencer marketing, reflecting a data-driven, efficiency-focused mindset. The region also stands out for its strong ethical standards, with marketers prioritising transparency, compliance, and responsible promotion.

“Short-form video is where the attention is, authentic collabs feel more trustworthy, new monetisation models keep creators motivated and new platforms maintain discovery fresh. I see these as the biggest opportunities because they really match how people engage with content now.”

Marketing Manager, Energy, **budget spend €50K–€75K**, Nordics

2

HOW ARE BRANDS MANAGING INFLUENCER MARKETING?

89%

of brands now manage all or part of the strategy in-house.

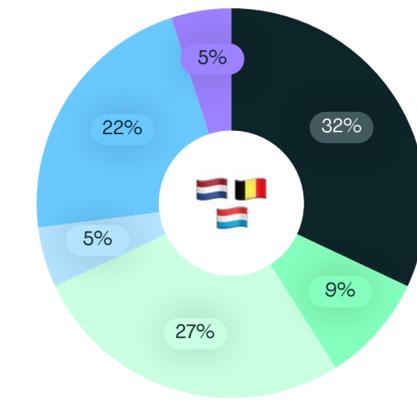
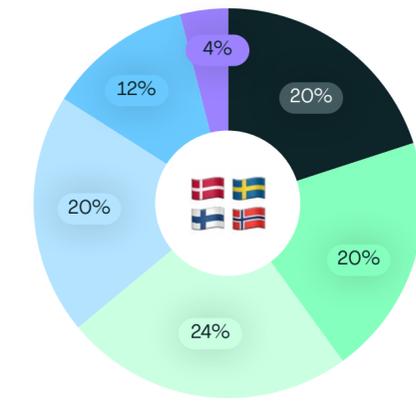
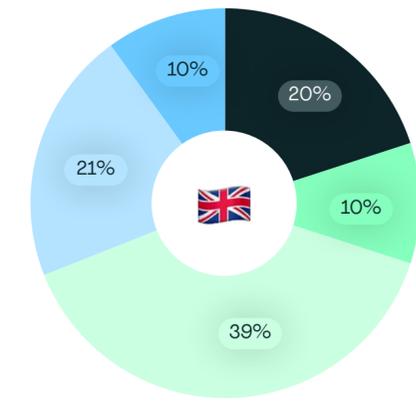
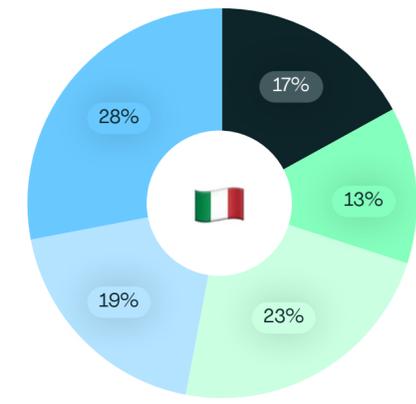
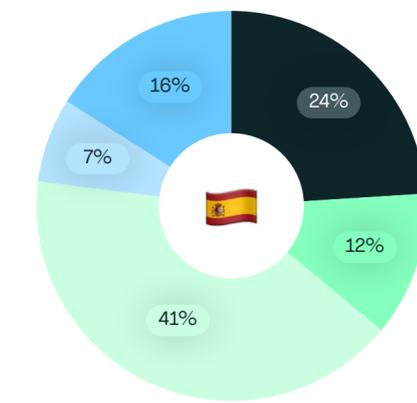
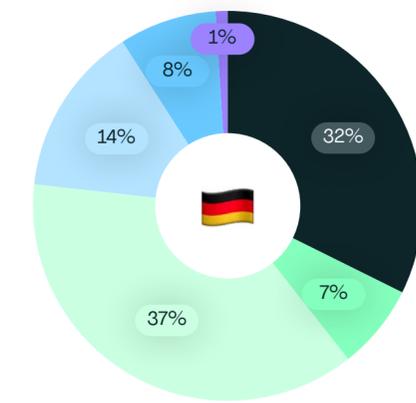
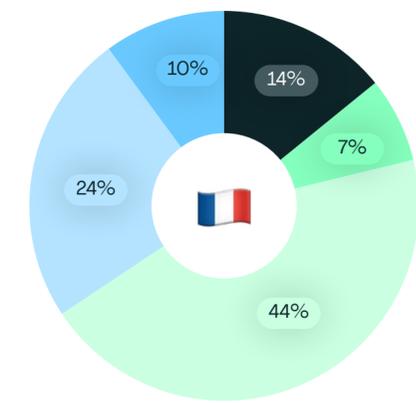
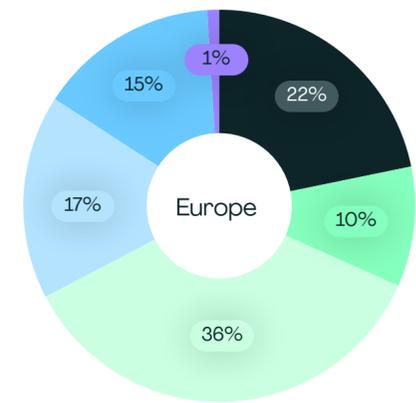
Influencer marketing has become essential to brand strategies, with 89% of brands now managing all or part of the strategy in-house. Spain and Italy are more likely than other countries to completely outsource influencer marketing to an agency. The UK and France show the strongest reliance on in-house teams with tech-platform support. France is also most likely to combine an in-house team with agency support. As influencer marketing grows, the adoption of tech tools and its integration into the marketing mix is becoming the norm, especially for larger companies.

IN-HOUSE VS AGENCY SETUP

Agency reliance: The most common influencer marketing setup across Europe involves a combination of in-house teams and agency support, particularly in France (44%) and Spain (41%). Just 10% of brands report outsourcing influencer marketing entirely to an agency.

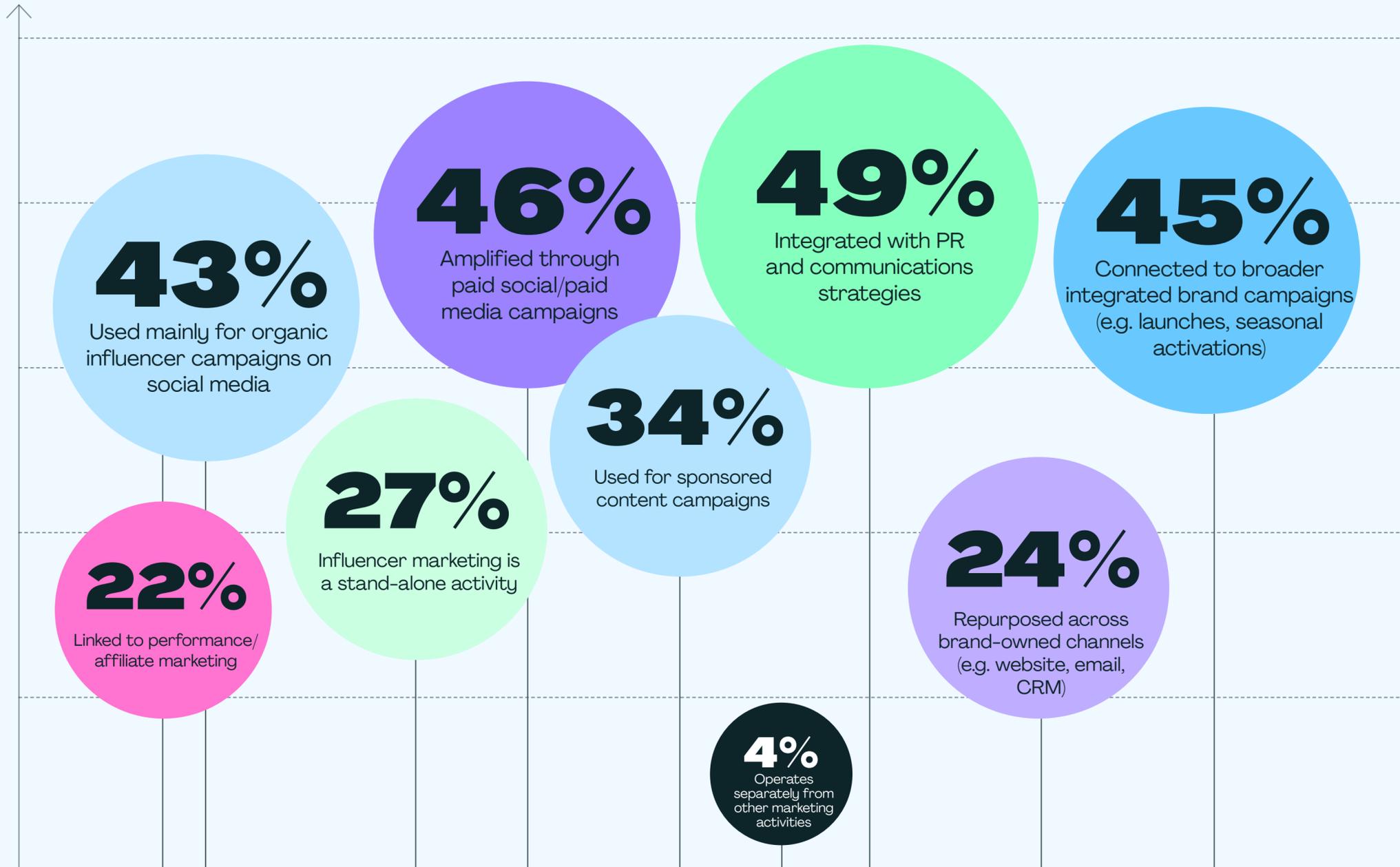


Who manages influencer activations for your company?





How is influencer marketing integrated into your company's overall marketing mix?



INTEGRATION WITH THE MARKETING MIX

52%

of UK brands integrate influencer marketing with PR and communication strategies

Influencer marketing is now a fully integrated discipline: nearly half of European brands (49%) connect it with PR and communications, and 46% amplify creator content through paid media, confirming its role as a core lever of the marketing mix rather than a side channel.

“I see influencer marketing becoming less of a standalone component, less of a curiosity, and more of a credible channel like any other media : integrating the same features and standards. It's the maturity phase.”

Head of Brand & Communications, Energy, budget spend €200K–€500K, France

TECH PLATFORM USAGE

39%

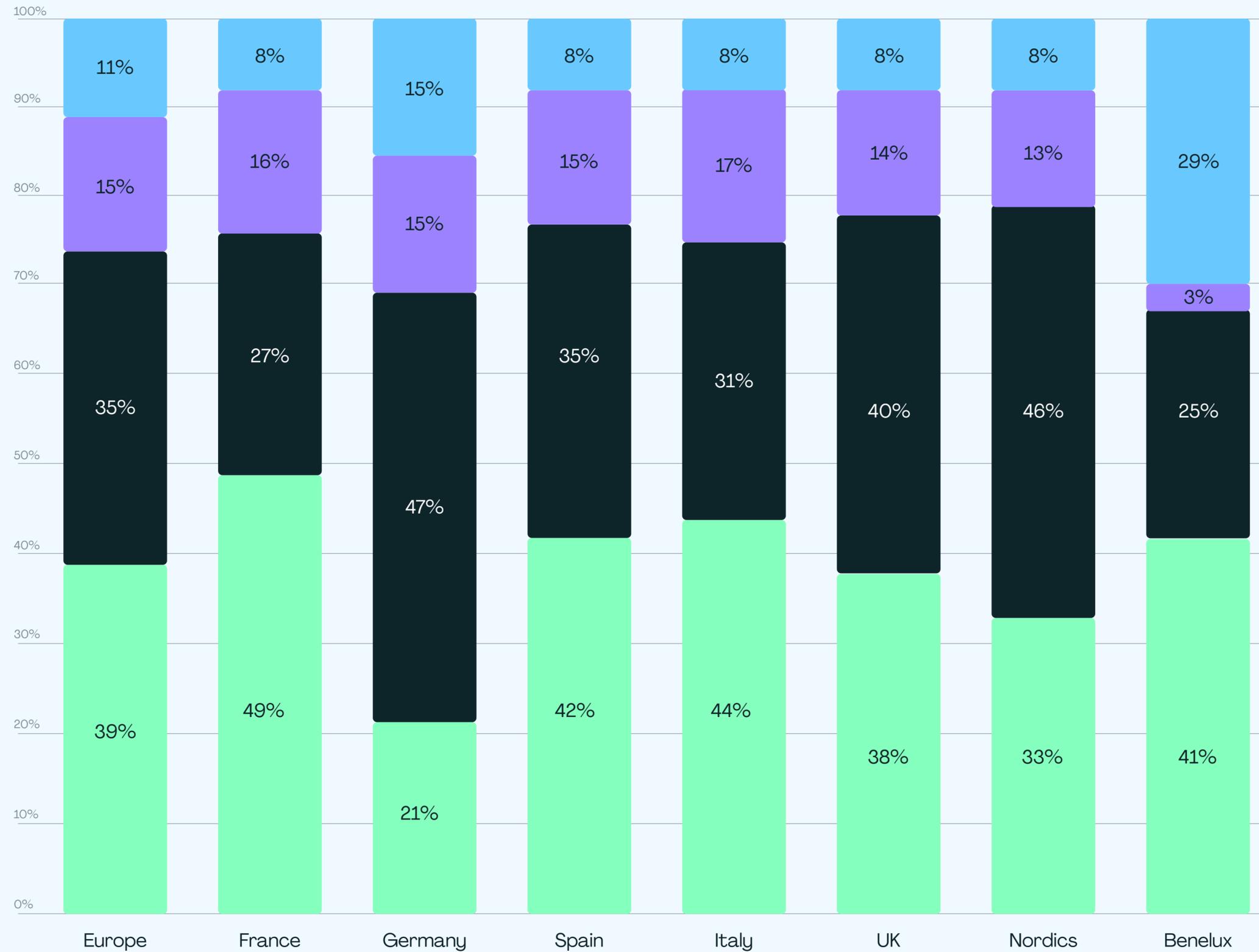
of brands and agencies across Europe use a dedicated influencer marketing platform

Tech adoption: Use of dedicated influencer marketing platforms is growing, with 39% of brands and agencies across Europe using a dedicated influencer marketing platform. France and Italy lead in tech adoption, followed by the UK. Marketers are mostly using tools for influencer discovery and audience quality checks, with just over half using tools for reporting and performance tracking. A third of marketers (36%) remain unconvinced about the added value of influencer marketing platforms.

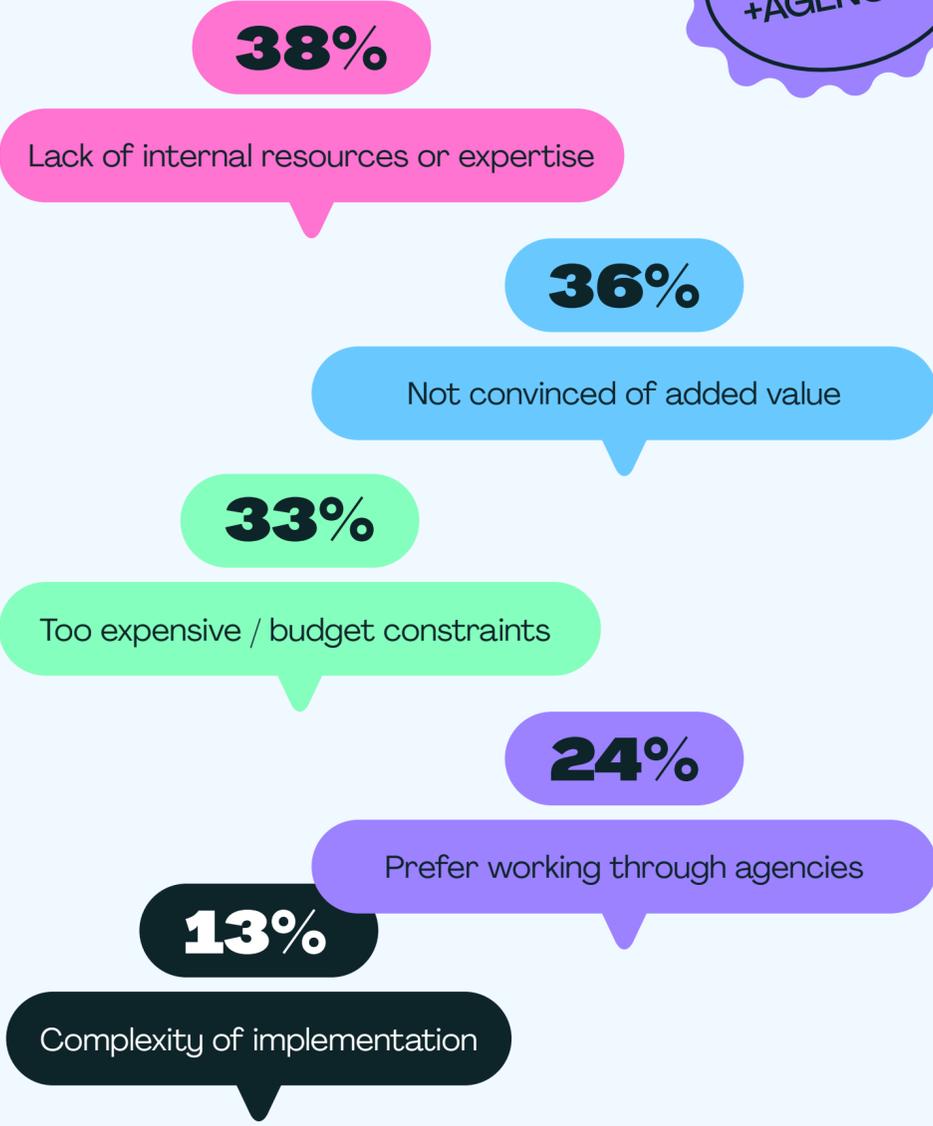
BRANDS
+AGENCIES

Does your company currently use a dedicated influencer marketing platform to manage your strategy?

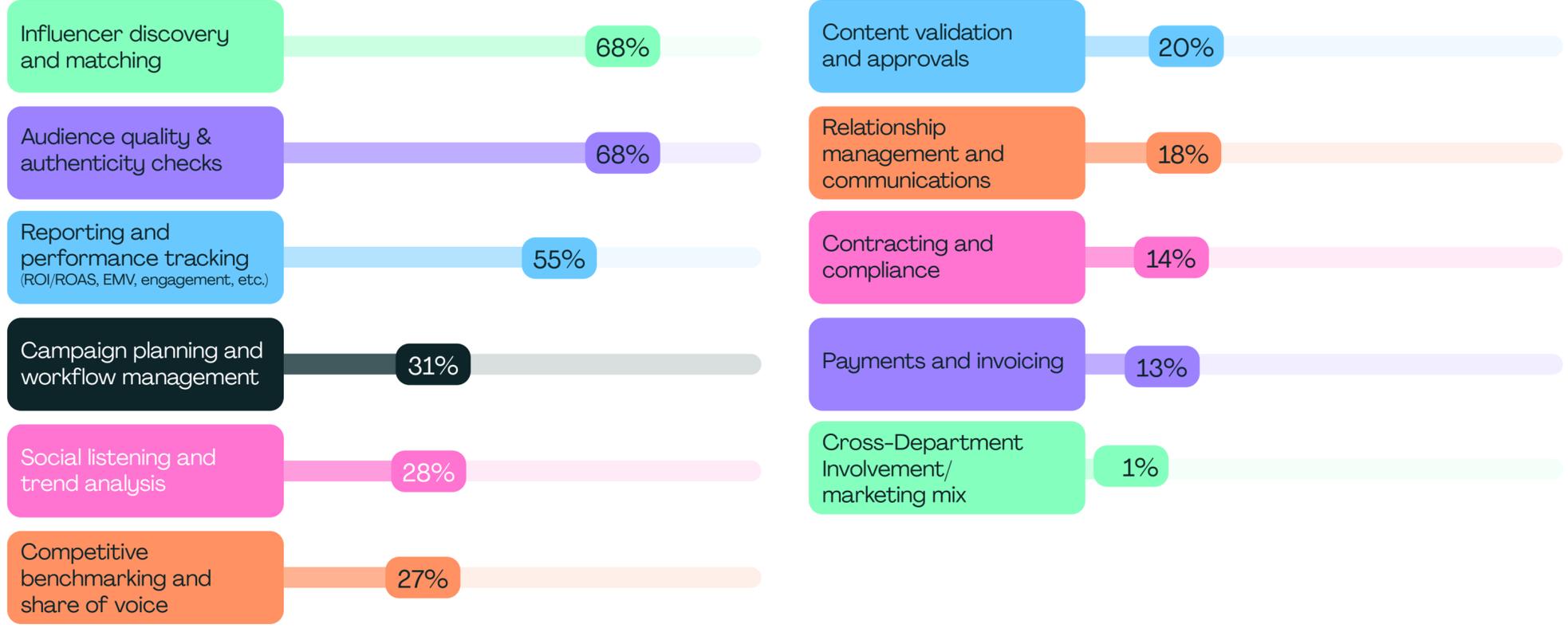
- Yes, we use one or more dedicated influencer marketing platforms
- No, but we use general marketing tools (e.g. CRM, social media, spreadsheets)
- No, we mainly work through agencies who use their own tools
- No, we do not use any tools for influencer marketing



BARRIERS TO PLATFORM ADOPTION IN INFLUENCER MARKETING



HOW MARKETERS USE INFLUENCER PLATFORMS - AND WHERE THEY DELIVER MOST VALUE



“Paid media spend will allow for the influencer content to reach further and work harder. The use of AI and automation is key in identifying the right influencers to work with in a sea of plenty.”

Head of Social, Beauty & Cosmetics, budget spend £1.01M–£3M, United Kingdom

3

SCALING INFLUENCE: HOW BRANDS ARE GROWING THEIR KOL ACTIVITIES

86%

of marketers work with micro-creators.

60%

of brands work with fewer than 100 KOLs annually.

93%

of marketers use Instagram for influence.

64%

of brands regularly renew the influencer pool.

75%

of marketers will increase the number of KOLs they collaborate with in 2026.

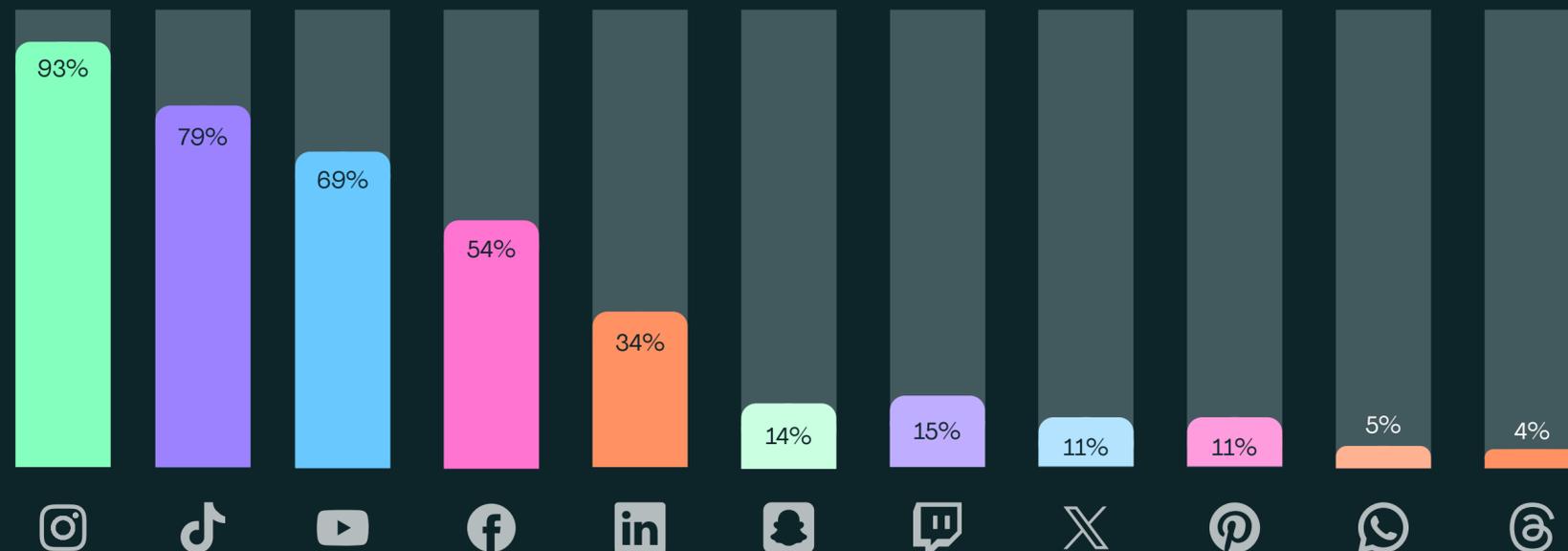
INFLUENCER MARKETING SOCIAL NETWORK USAGE

Instagram and TikTok dominate Europe's influencer landscape. 93% of marketers run campaigns on Instagram and 79% on TikTok, confirming both platforms as the twin pillars of influencer marketing across all markets, while YouTube (69%) consolidates its role as a strong complementary channel. LinkedIn's growing importance for B2B influence is evident with 34% of marketers using the platform, rising to 40% in Spain. Use of YouTube just edges out TikTok in Germany, but is much less important to marketers in the UK.



On which social media networks do you run campaigns?

Europe

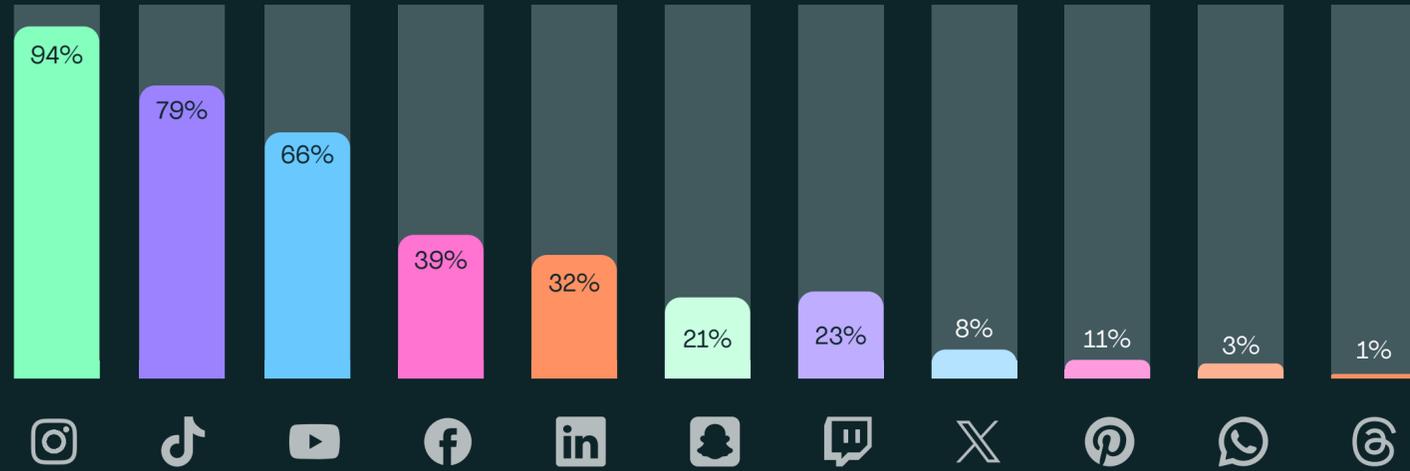


"I think TikTok Shop is potentially one of the biggest game changers we are about to see for brands and influencers turned affiliates in a time where followers are increasingly less valuable than the ability to go viral in a democratized content stream where quality stands out."

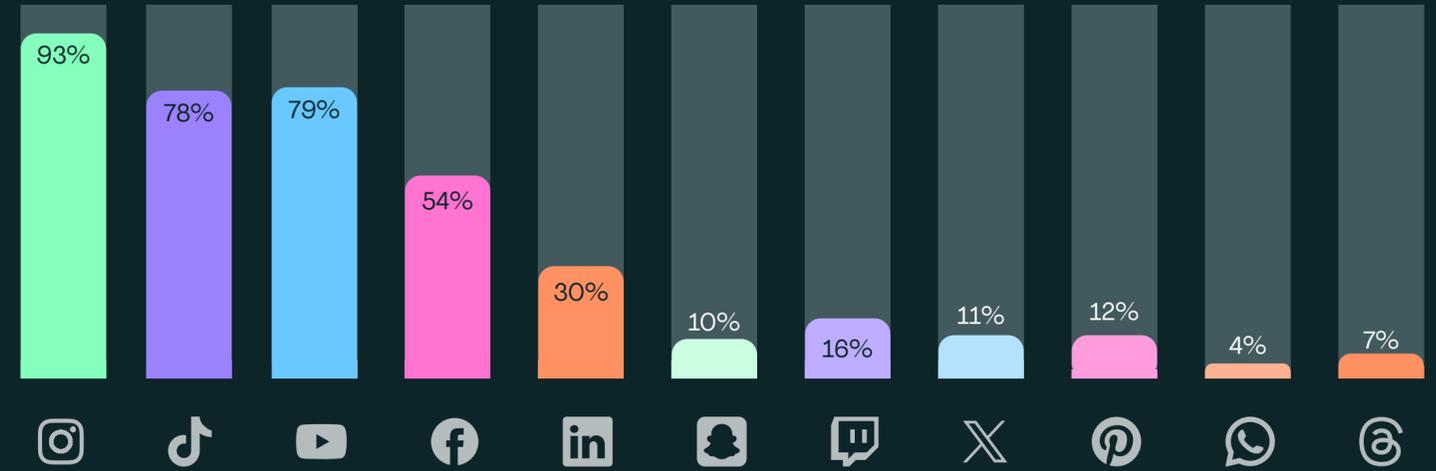
Sr. Global Digital Director, Beauty & Cosmetics, budget spend €500K–€1M, Nordics

On which social media networks do you run campaigns?

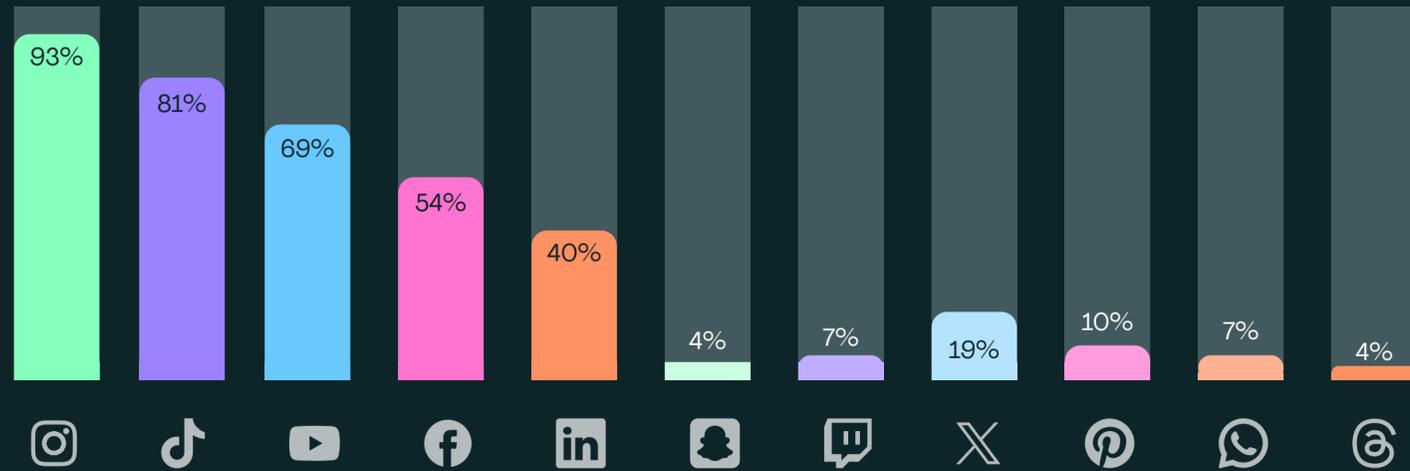
 France



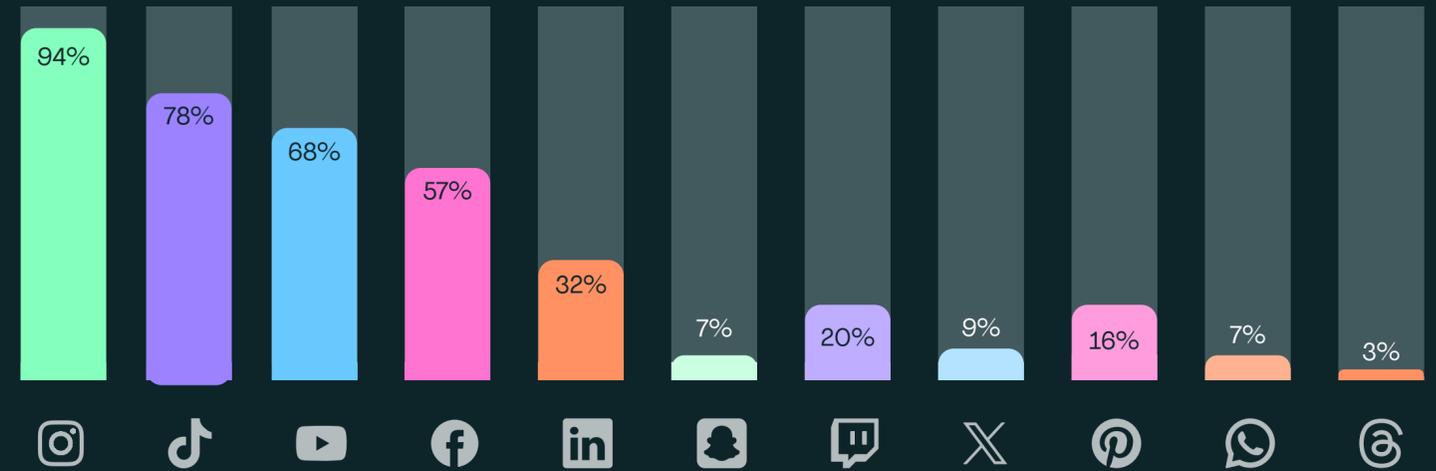
 Germany



 Spain

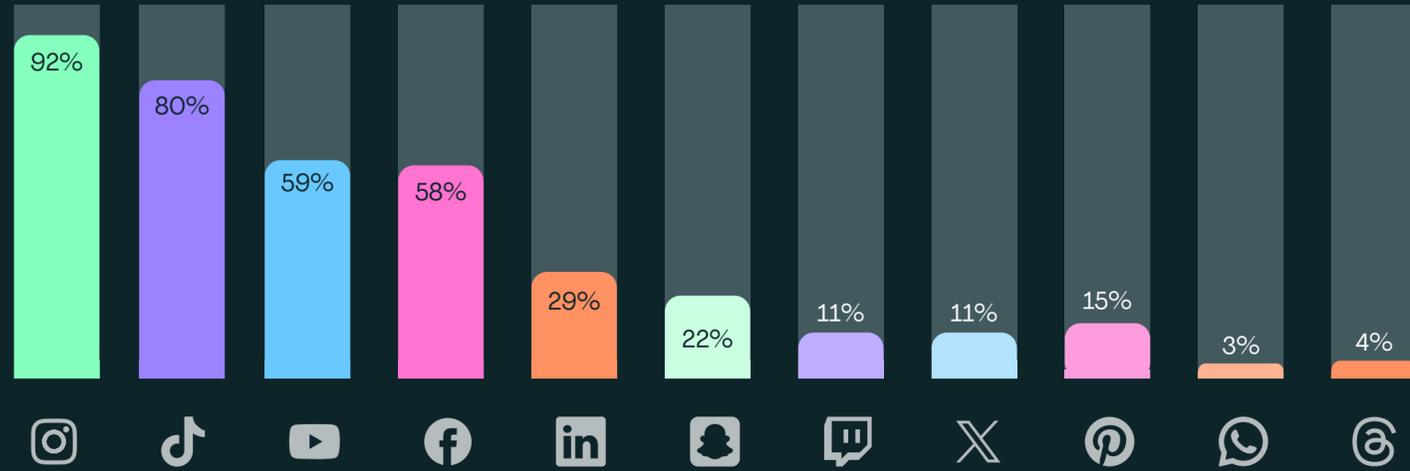


 Italy

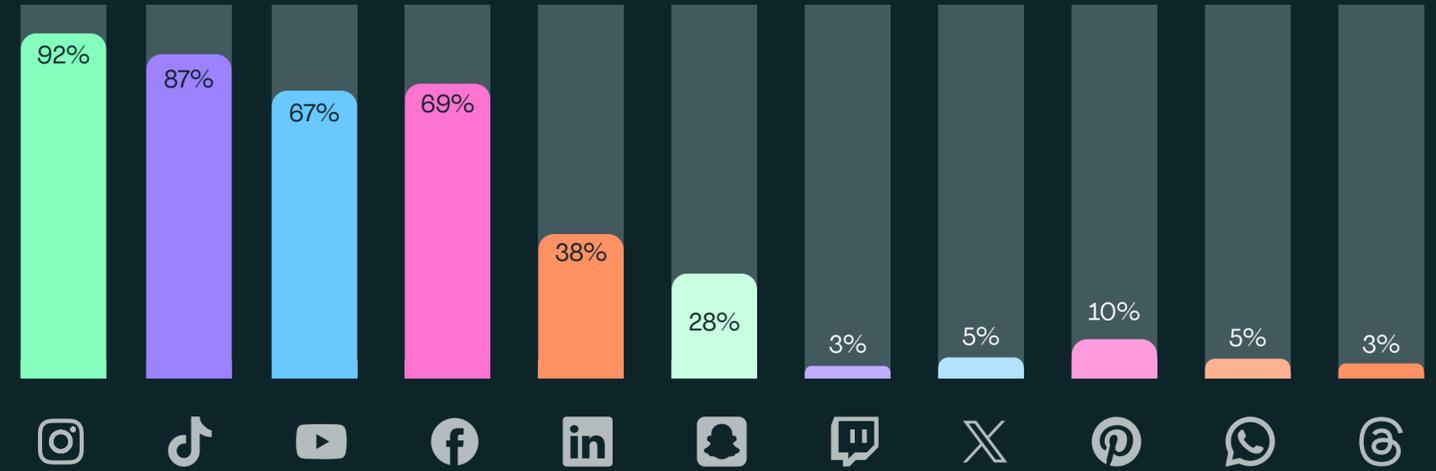


On which social media networks do you run campaigns?

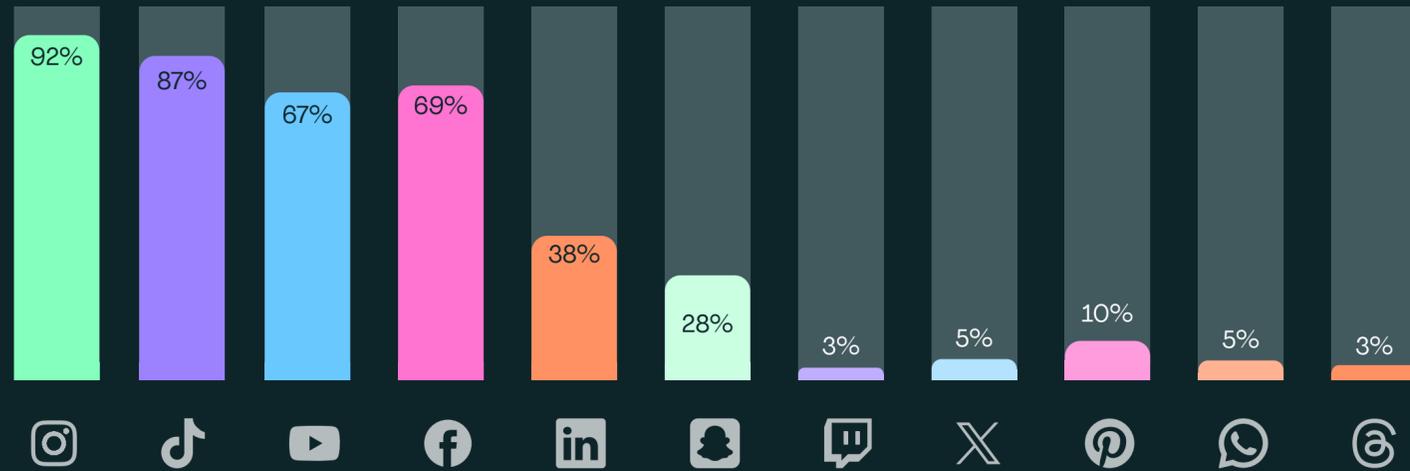
 United Kingdom



 Nordics



 Benelux

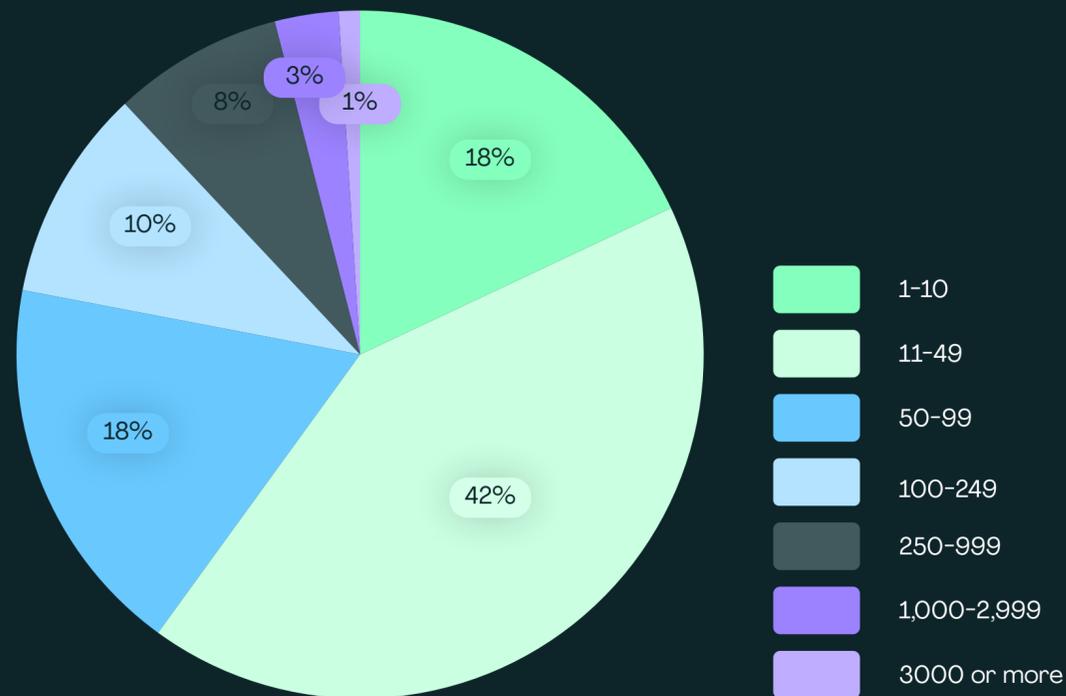


KOL COUNT

2025 data shows the level of KOL collaborations continues to be modest, with 42% of brands and agencies activating 11 - 49 influencers, followed by 18% who activate 50 - 99 annually. This perhaps reflects the broader market trend of partnering with influencers on a long-term basis.



Approximately how many influencers do you work with annually?



Which of the following types of influencers do you work with?



■ Nano influencers: 1,000-10,000 followers
■ Micro influencers: 10,000-100,000 followers
■ Macro influencers: 100,000-1M followers
■ Mega/celebrity influencers: 1M+ followers

“Consumers’ trust in influencers, especially mega influencers, is decreasing.”

Senior Brand Manager, Food & Beverage Manufacturing, budget spend €50K–€75K, Italy

INFLUENCER COLLABORATIONS ACCELERATE ACROSS EUROPE

75%

of marketers intend to increase the number of partnerships again in 2026

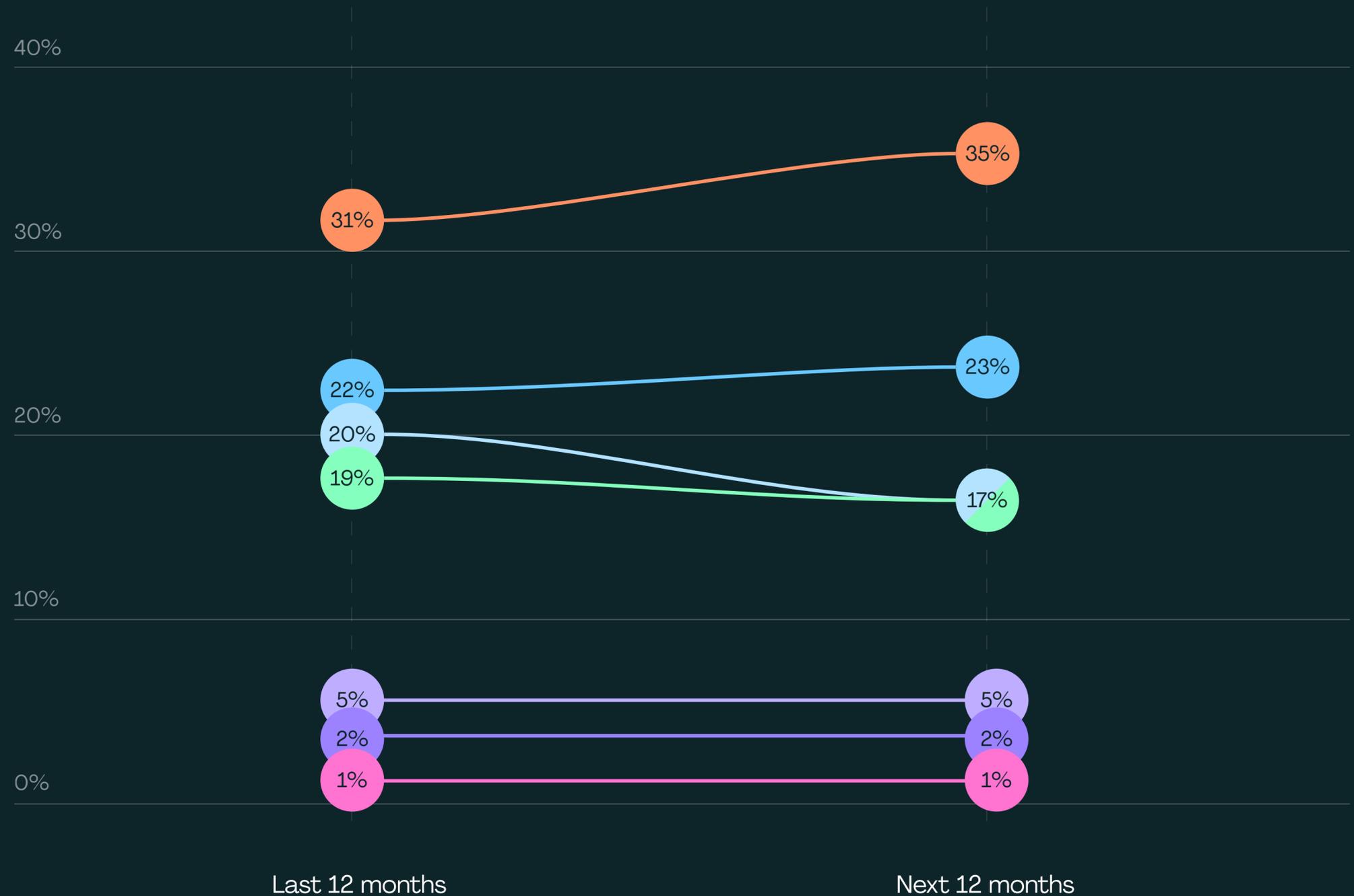
Influencer collaborations are accelerating. 73% of marketers reported increasing the number of KOLs they worked with in the past year, and 75% intend to increase the number of partnerships again in 2026. More than half expect to moderate growth of up to 50% in their creator networks, while 8% expect reductions.

“We have seen less engagement with perfectly produced brand content than in the past. Therefore we want to increase the usage of influencer content in our always-on campaigns. It will be our way of having an awareness activation year-round.”

Campaign Lead, Home Décor & Equipment, budget spend €150K–€200K, Germany



How has the number of influencers your company works with changed in the last 12 months, and how do you expect it to change in the next 12 months?



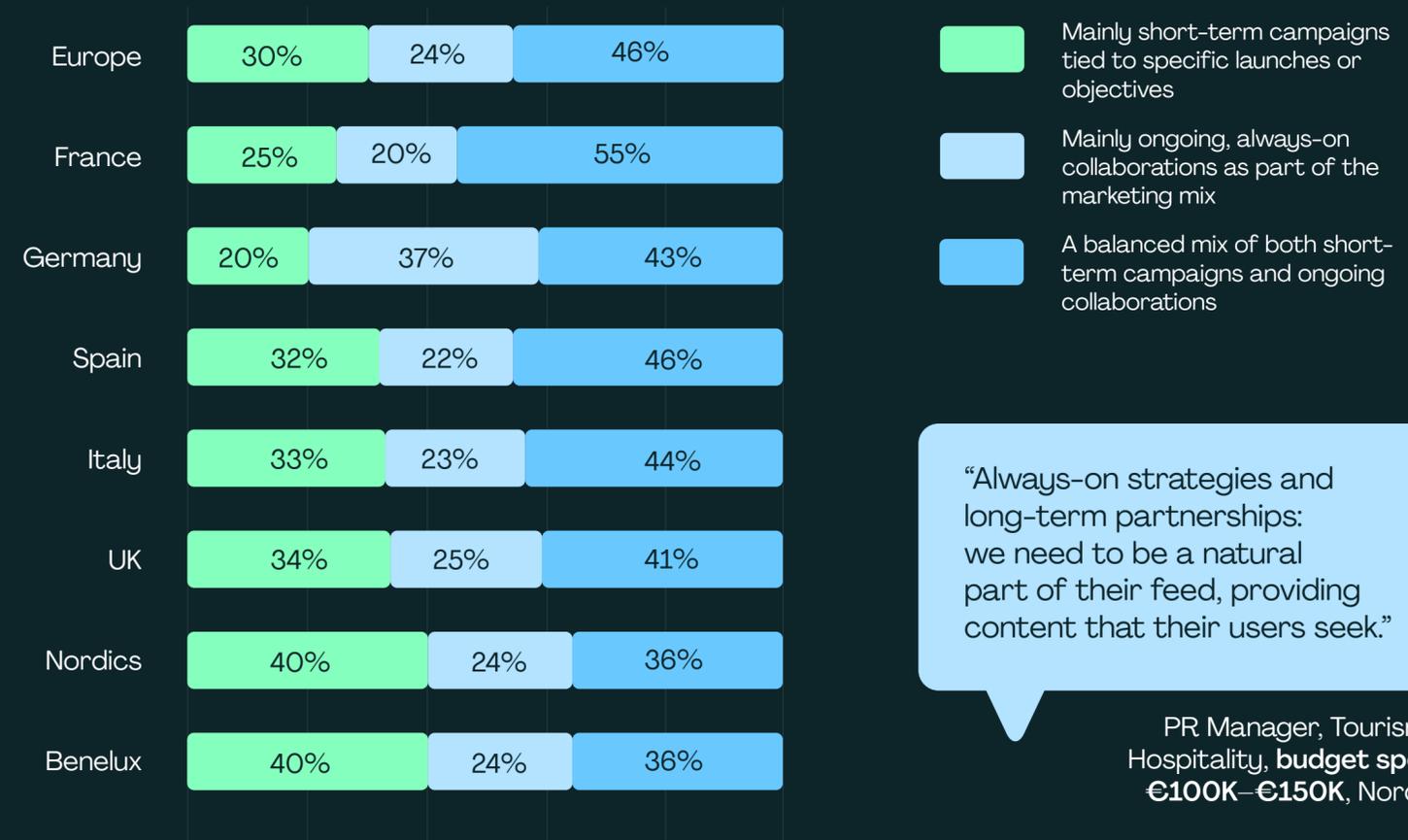
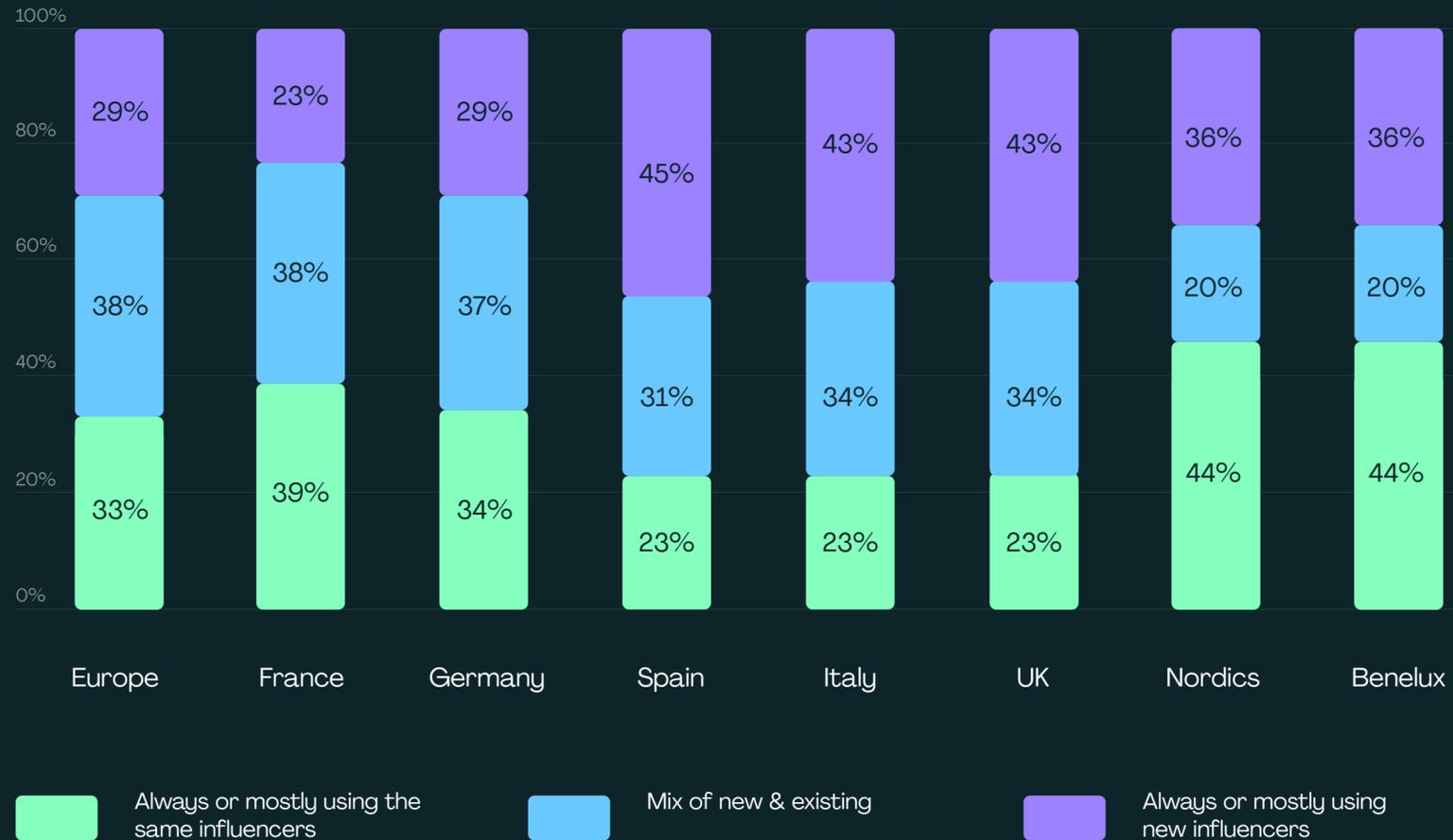
USE OF NEW VS. EXISTING INFLUENCERS

Two-thirds of brands either mostly or always work with new influencers, reflecting a strong trend toward influencer renewal. Italy leads in KOL renewal, with 37.5% of brands working exclusively with new influencers.

Collaboration Types Most brands maintain a balanced mix of both short-term and long-term collaborations (46%). This preference is particularly pronounced in France (55%), while the UK leads the field in activating short-term collabs.

BRANDS Do you typically work with the same influencers or are you always working with new ones?

BRANDS How would you best describe your company's approach to influencer collaborations?

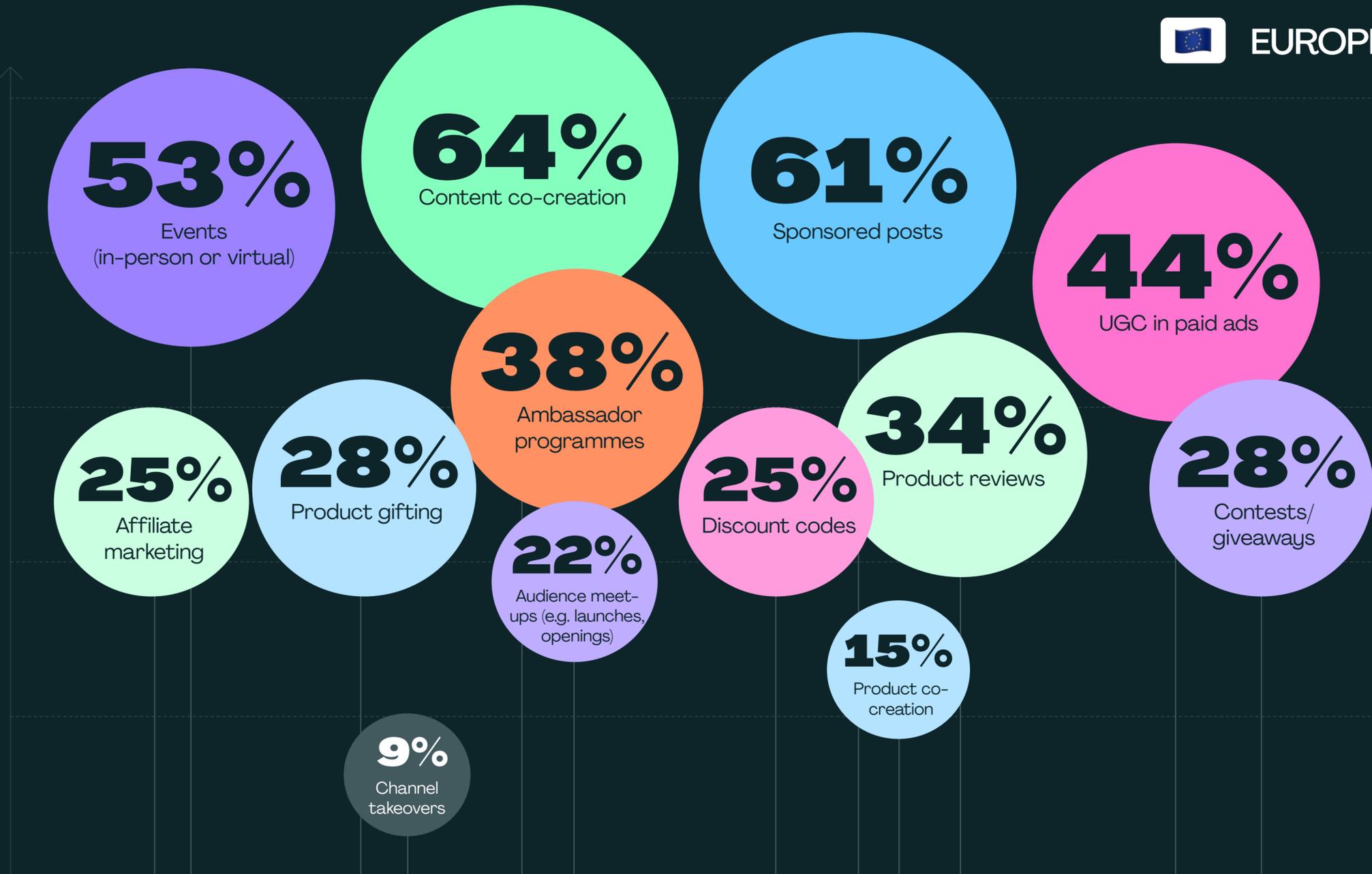


“Always-on strategies and long-term partnerships: we need to be a natural part of their feed, providing content that their users seek.”

PR Manager, Tourism & Hospitality, budget spend €100K–€150K, Nordics

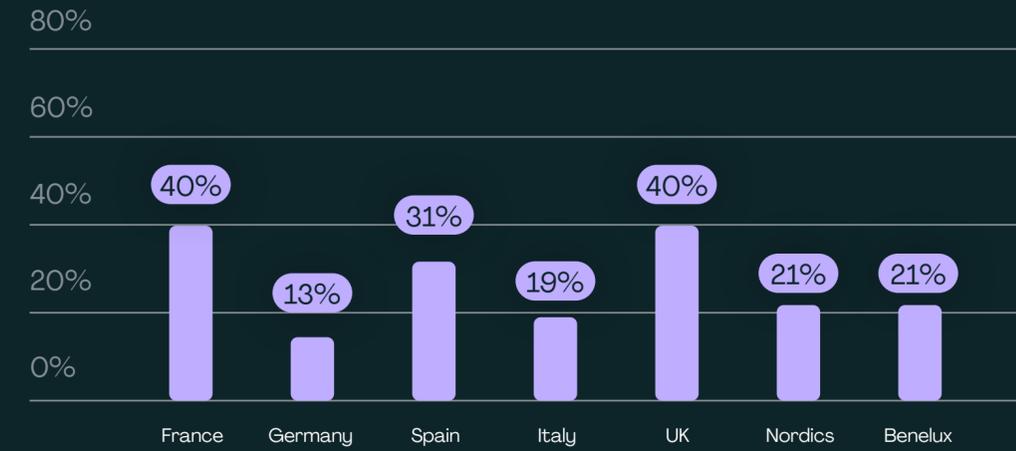
In which of the following ways does your company use influencer marketing?

EUROPE



Marketers in 2025 are leaning heavily (64%) into content co-creation formats with influencers, highlighting the emphasis on authentic, natural content that audiences will trust. Product gifting appears to be losing favour in most markets, although is still widely used in the UK and Germany.

Product gifting

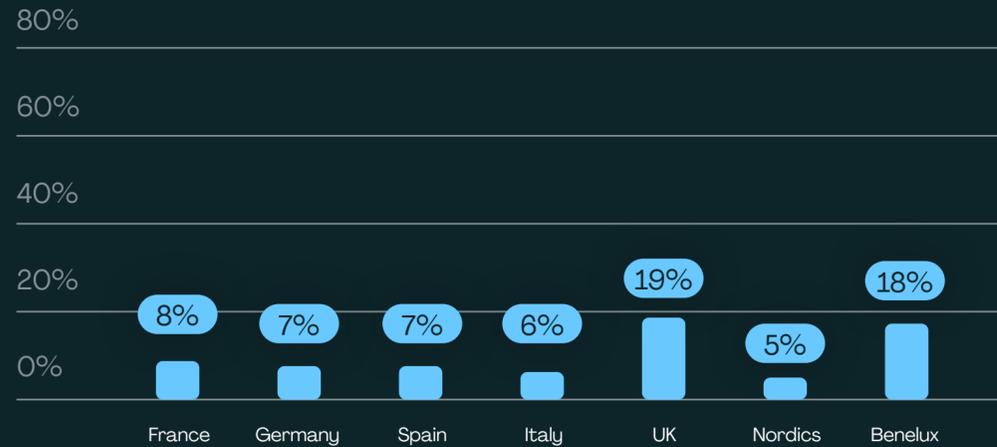


Sponsored posts

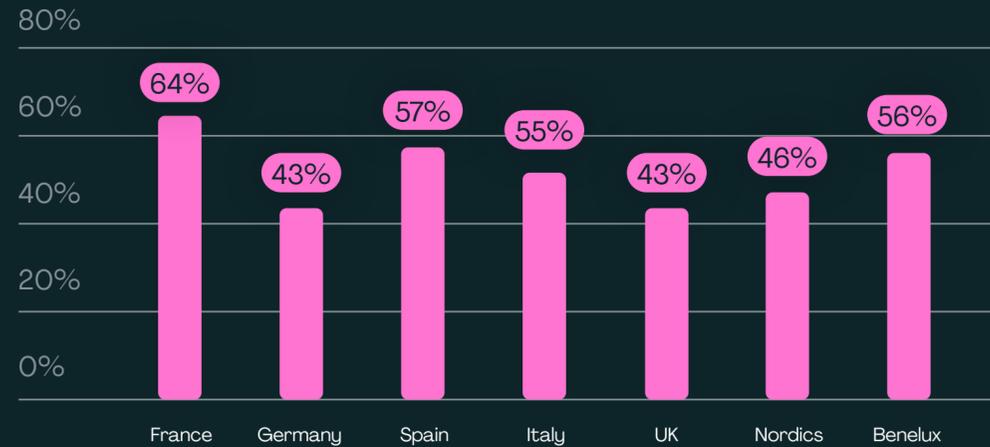


In which of the following ways does your company use influencer marketing?

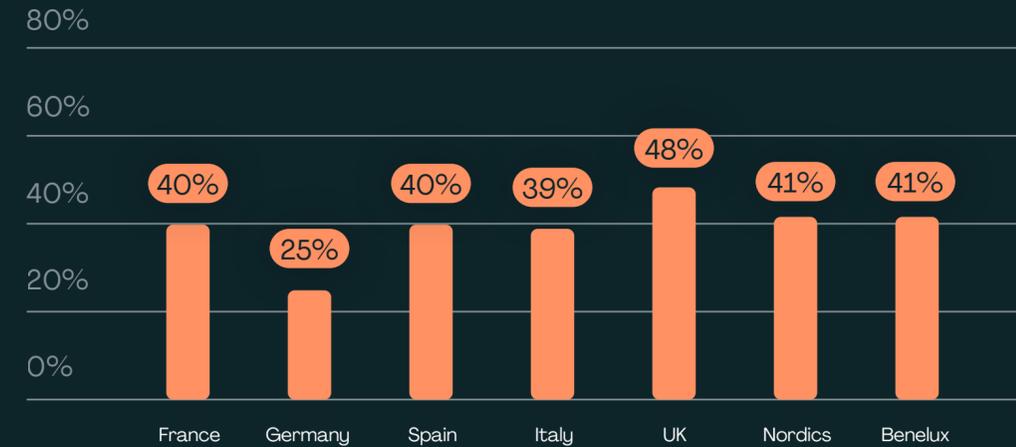
Channel takeovers



Events (in-person or virtual)



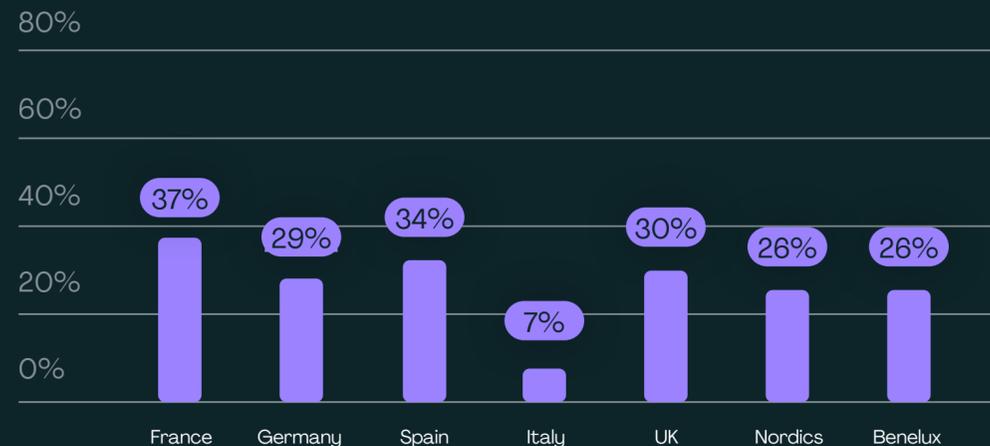
Ambassador programmes



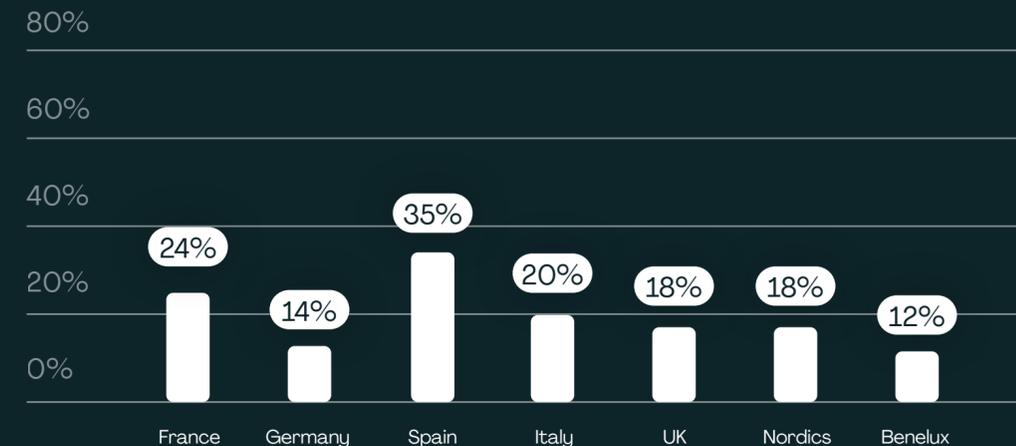
Product reviews



Contests/giveaways

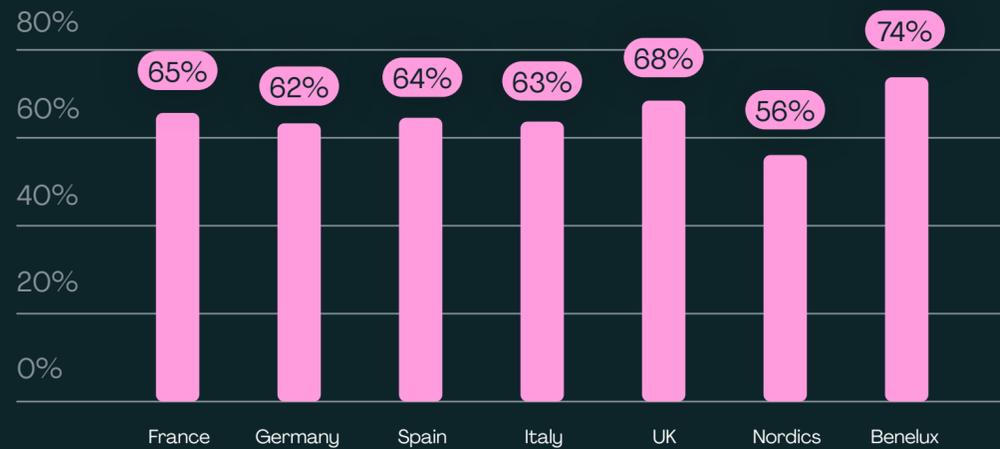


Audience meet-ups (e.g. launches, openings)

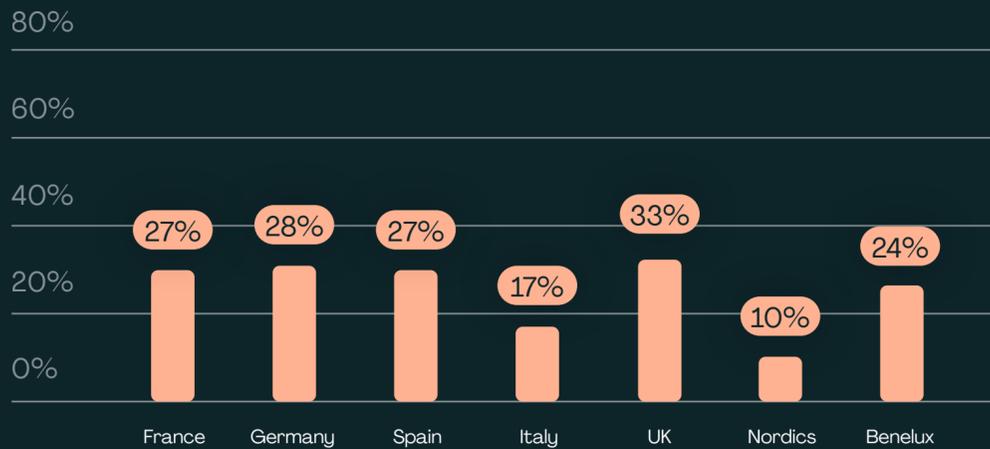


In which of the following ways does your company use influencer marketing?

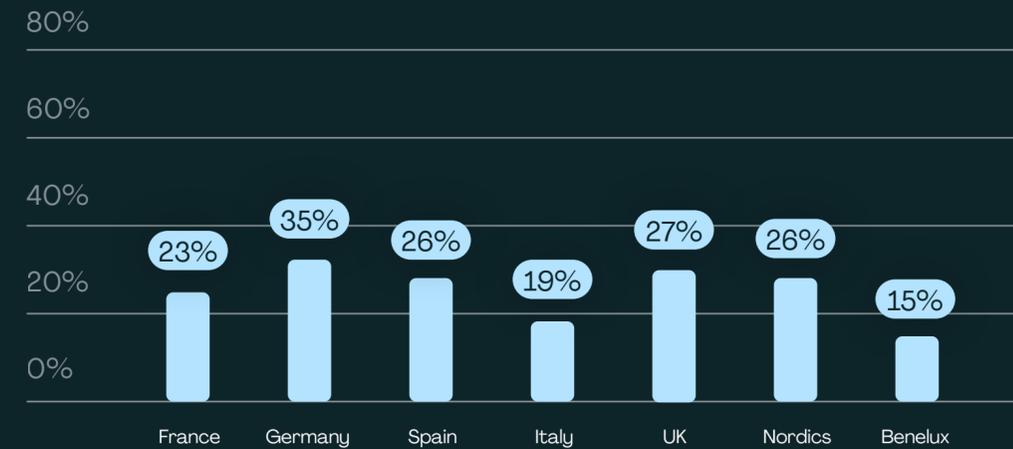
Content co-creation



Affiliate marketing



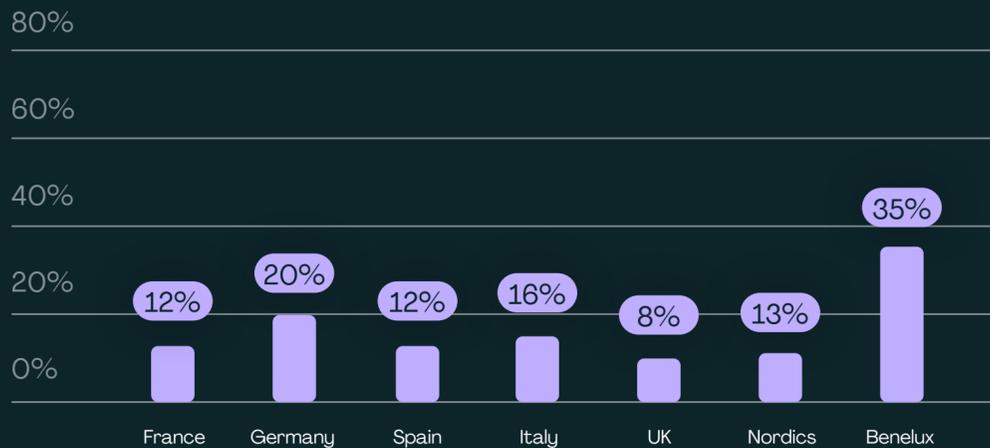
Discount codes



UGC in paid ads



Product co-creation

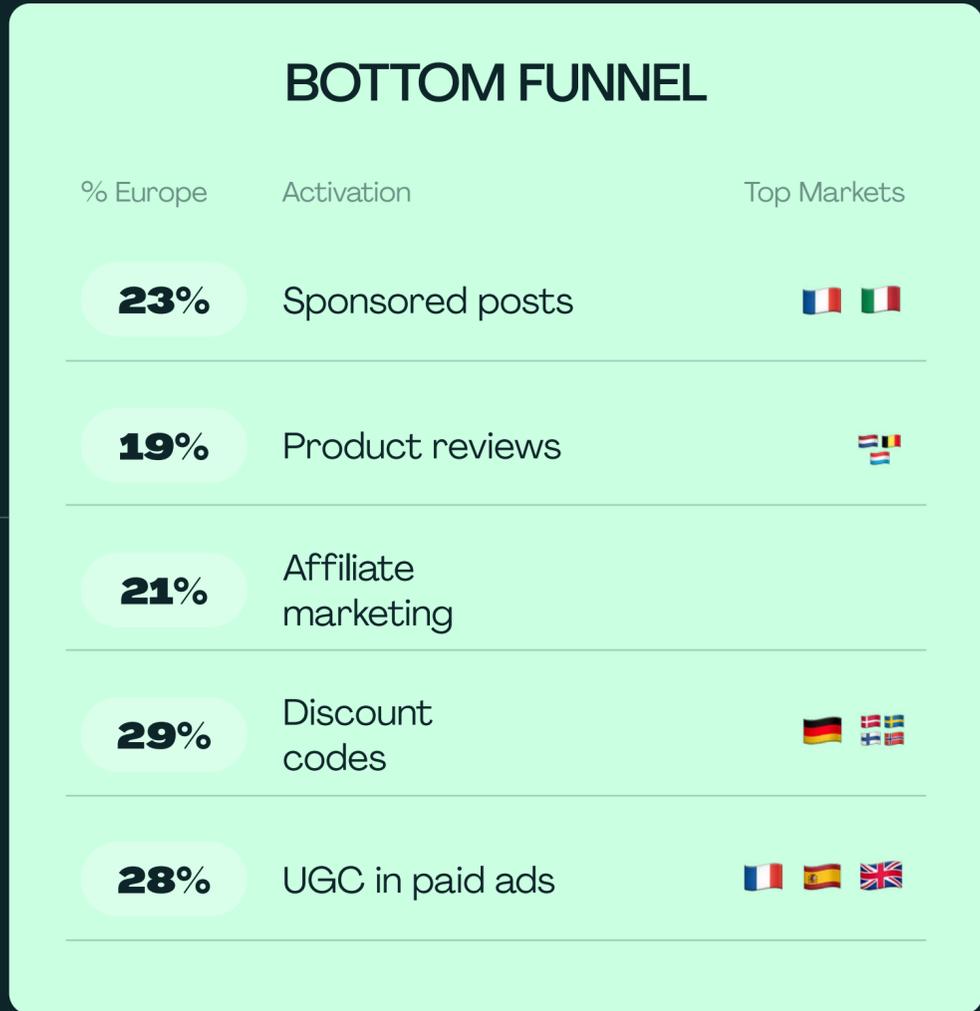


TOP-5 INFLUENCER ACTIONS ACROSS THE MARKETING FUNNEL

Sponsored posts dominate top-funnel activity, particularly in Italy, the UK, Nordics, and Benelux, while France and Spain favour more experiential formats. Content co-creation leads at the mid-funnel stage, with events also strong in France, Spain, and Benelux. At the bottom of the funnel, discount codes are key in Germany, the UK, and Nordics, while UGC in paid ads is rising in the UK and Spain. France and Italy, however, continue to rely on sponsored posts for conversions.

“Short videos boost visibility and engagement, AI and automation optimise targeting and performance, and social commerce directly converts this audience into measurable sales. Together, it’s about leverage, data and creativity.”

Social Media Specialist, Energy, budget spend €200K–€500K, France



How to read : 39% of European marketers use content co-creation for top-funnel campaigns — a trend also strongly confirmed in Germany and Spain.

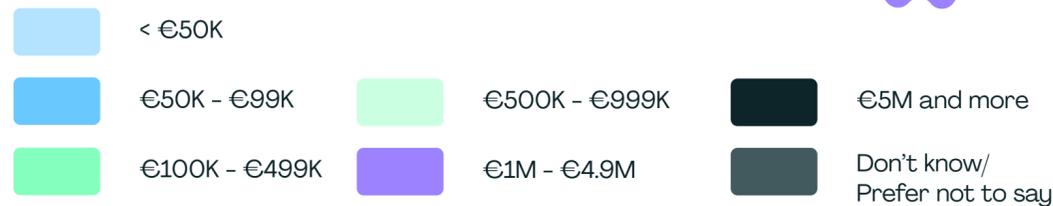
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INVESTING IN IMPACT: BUDGET TRENDS AND FORECASTS

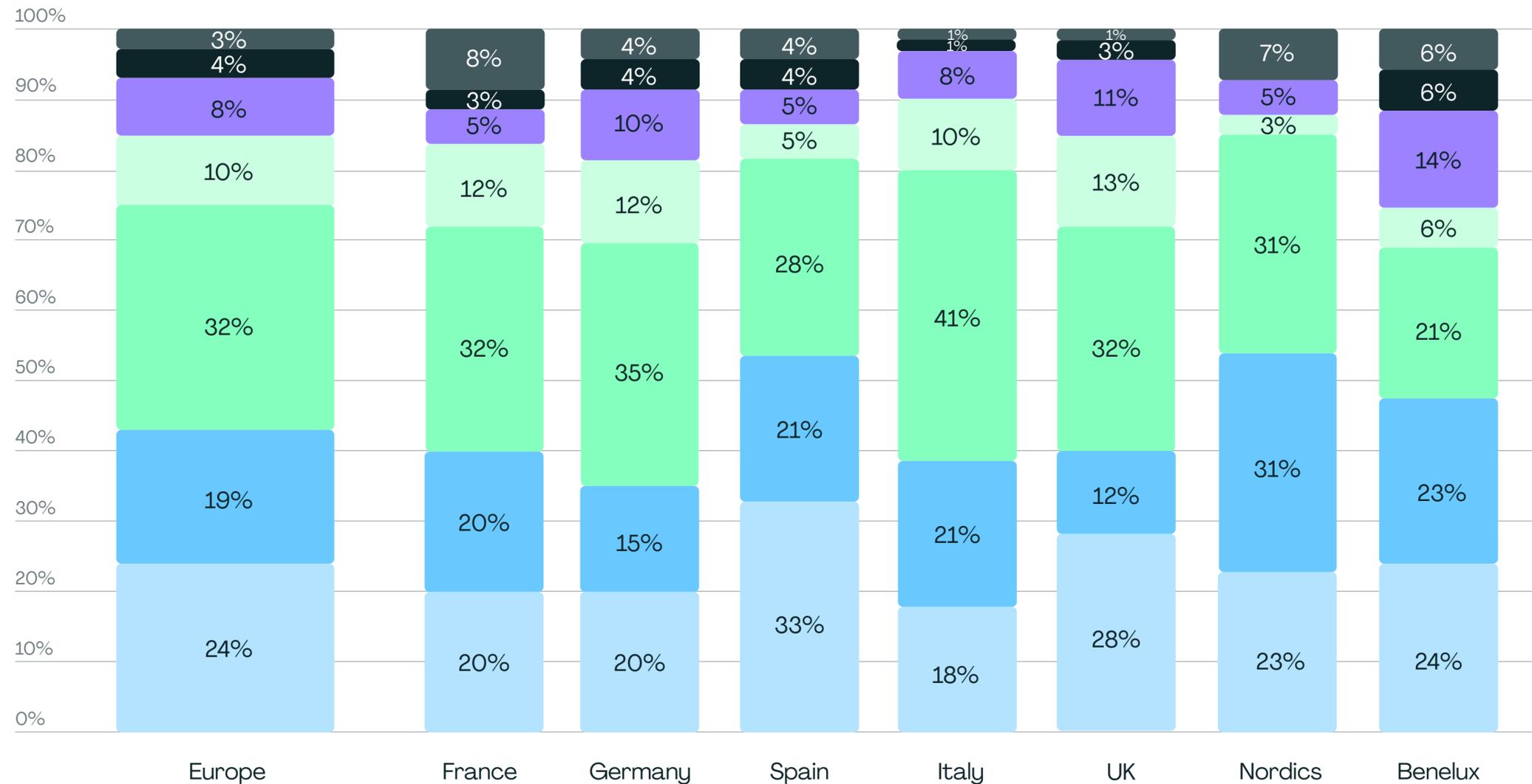
Median spend : **€175K**

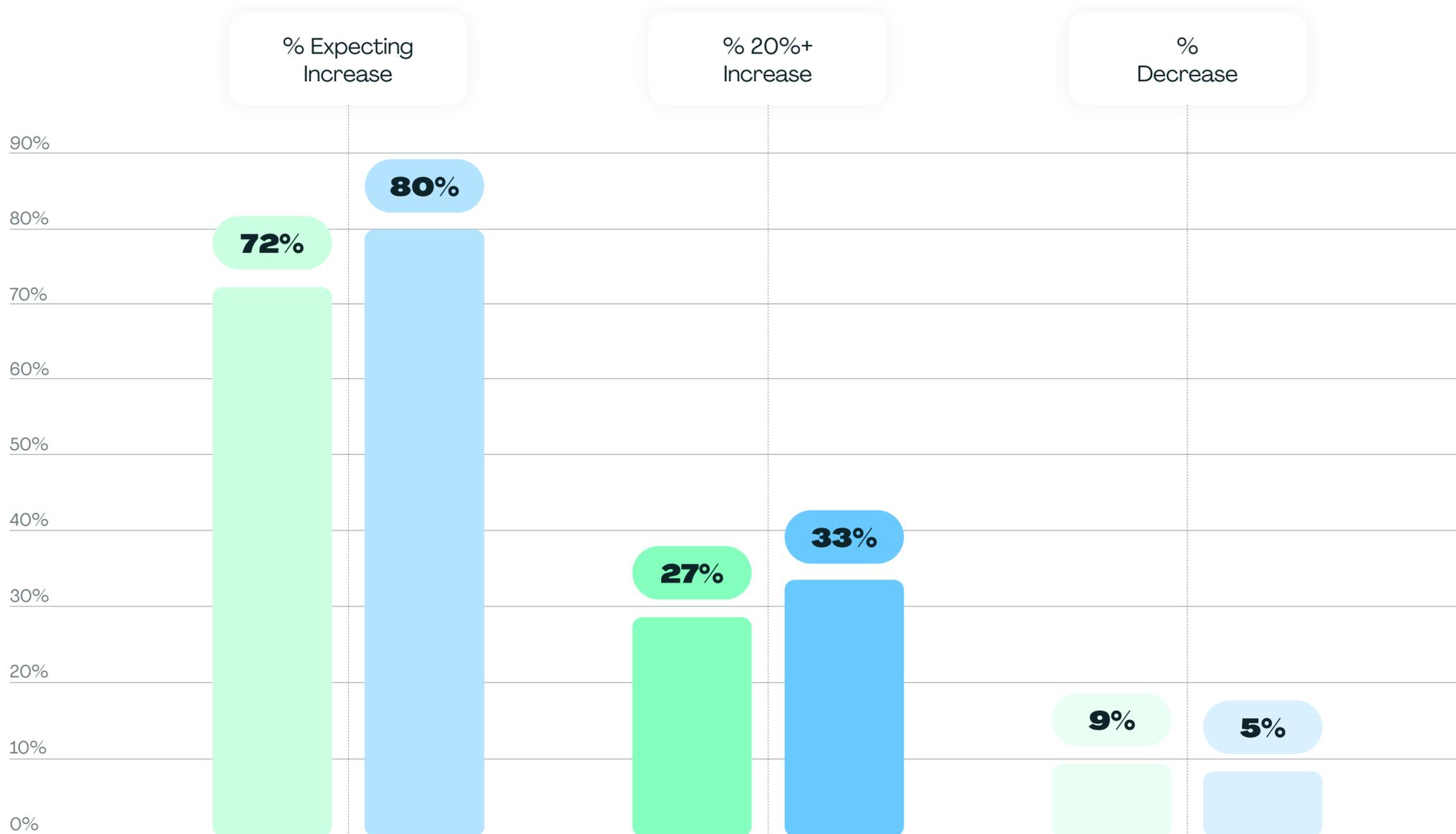
Overwhelmingly, brands and agencies report plans to increase budgets for influencer marketing in 2026. However, budgets in 2025 remain relatively moderate, with the median spend coming in at €175k, and 11% of marketers reporting annual budget spend upwards of €1M. Trends for future investments reflect the market realities, with marketers prioritising increased investments in UGC, long-term partnerships and paid media.

Which of the following best describes how much your company spent on influencer marketing in the last fiscal year?



BUDGET SPLIT BY COUNTRY





Cautiously optimistic. Steady growth driven by Italy and Spain, but France is more conservative.



More bullish. Expecting strong client demand and expansion of influencer programs.

2026 BUDGET FORECASTS

72% of brands anticipate budget growth next year, up from 54% who predicted growth for 2025. Most marketers anticipate budget growth between 10% and 50% in 2026. Southern Europe, particularly Italy and Spain, shows the highest optimism, while the UK stands out for its ambitious jumps in investment, with more than one in ten expecting increases above 50%. Only a small minority of respondents across all countries foresee any budget reductions.



How do you expect the amount your company or biggest client spends on influencer marketing to change over the next 12 months?



2026 BUDGET FORECASTS

57%

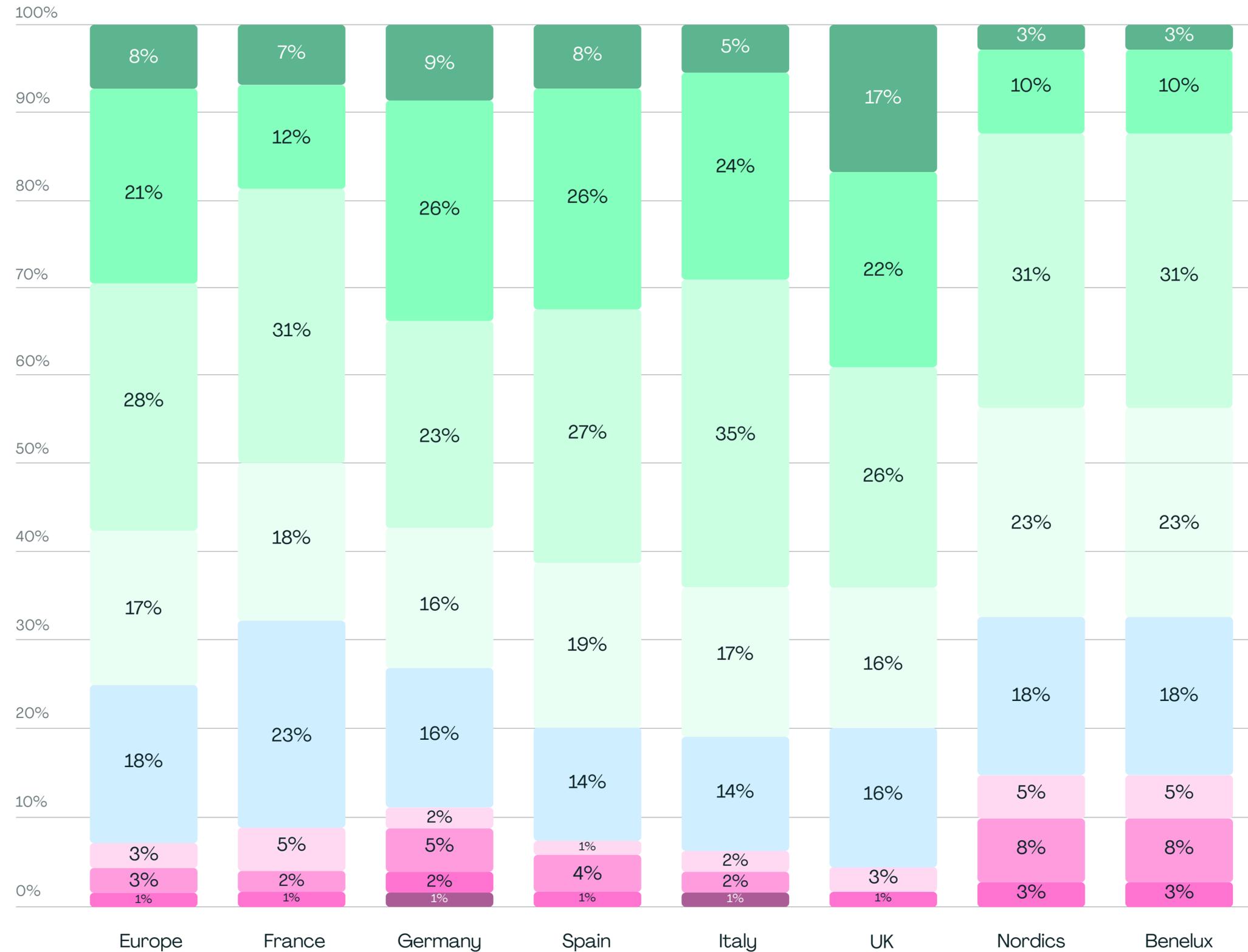
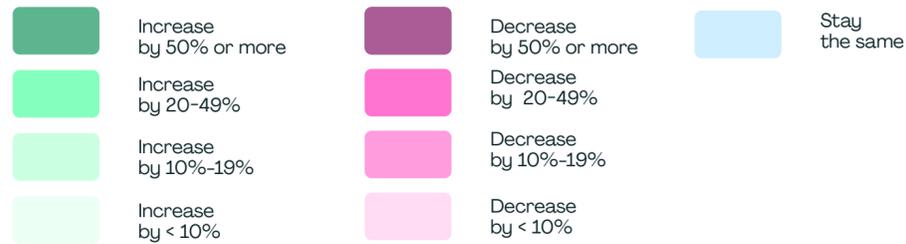
of European marketers expect an increase of more than 10% in their influencer marketing spend in 2025.

17%

of UK marketers even plan to increase their budgets by 50% or more.

**BRANDS
+AGENCIES**

How do you expect the amount your company or biggest client spends on influencer marketing to change over the next 12 months?



WHERE MARKETERS PLAN TO INCREASE INFLUENCER MARKETING BUDGETS IN 2026

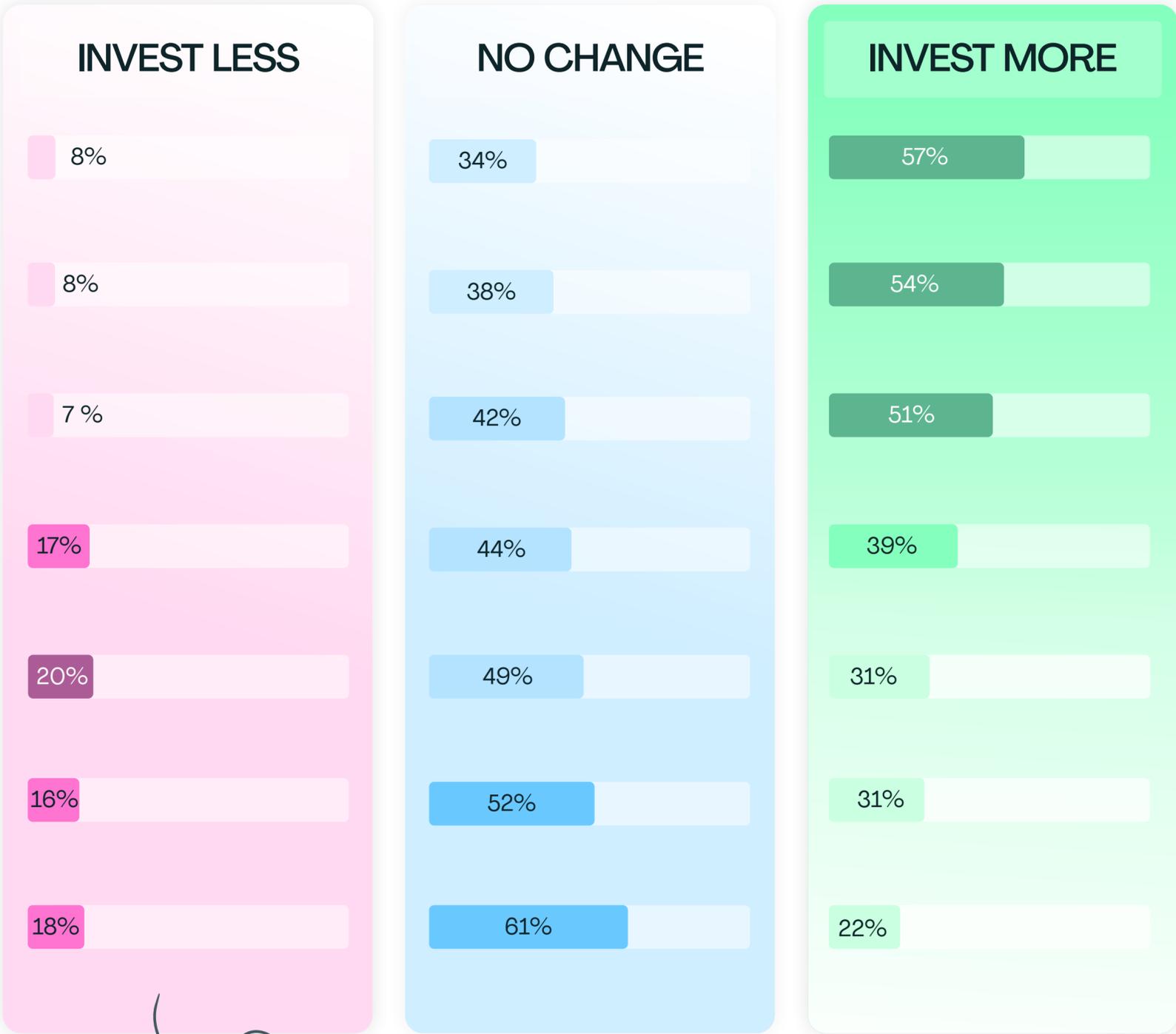
Investment Focus: The most significant investment trends are toward paid media amplification and long-term influencer partnerships.

BRANDS + AGENCIES

In the next 12 months, how do you expect your company's or biggest client's influencer marketing budget allocation to change across the following areas?

"We want to use the right form of content that is native to the platforms it is advertised on, but used in a longer period of time to get the most out of the partnership and build long-term brand awareness."

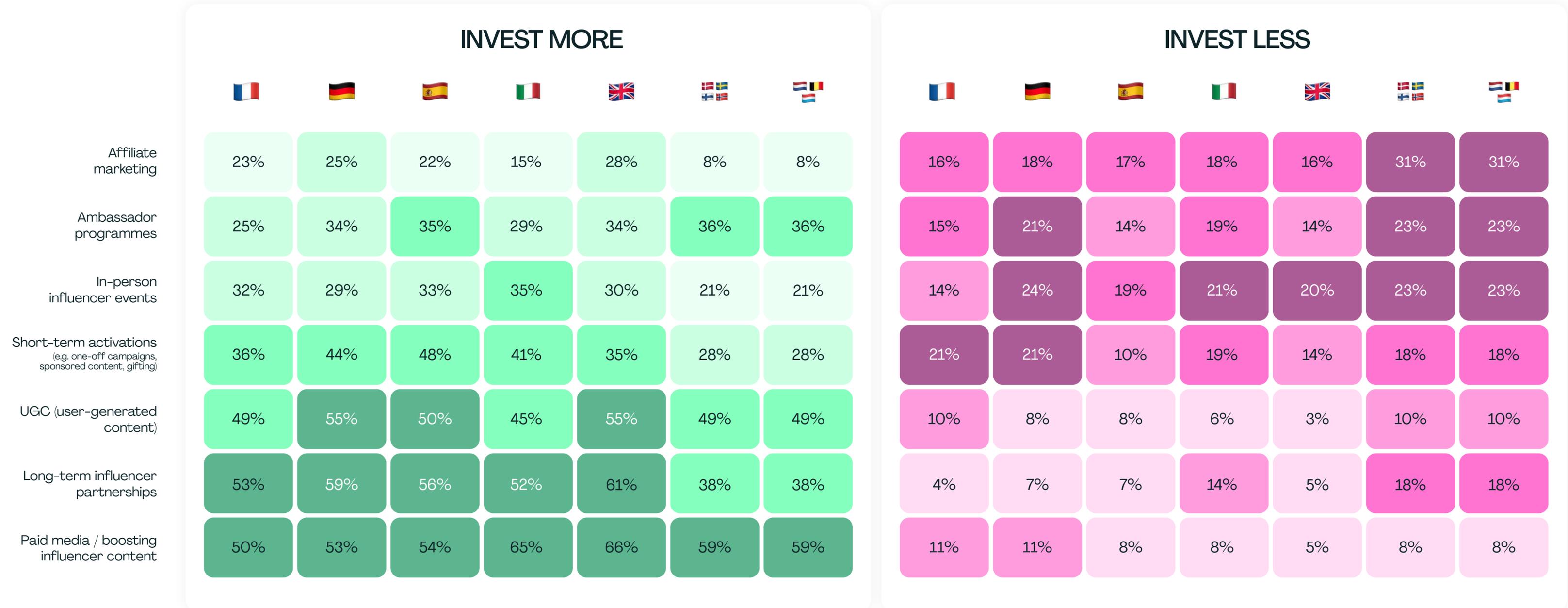
Global Manager Digital Marketing, Food & Beverage Manufacturing, budget spend €150K–€200K, Netherlands



How to read : 18% of European marketers expect to cut budgets for affiliate marketing in 2026.

HOW BUDGET PRIORITIES DIFFER ACROSS EUROPEAN MARKETS

In the next 12 months, how do you expect your company's or biggest client's influencer marketing budget allocation to change across the following areas?



5

ROI MEETS ETHICS: BALANCING PERFORMANCE, PAYMENTS, AND PRINCIPLES

Engagement metrics remain the top priority for brands and agencies when evaluating campaigns. While performance-driven metrics like ROI and conversions are growing in importance, visibility-focused KPIs such as reach, impressions, and engagement rate dominate across all stages of the funnel. As campaigns become more structured, fixed fees remain the most common compensation model, though long-term contracts and product gifting are also widely used.

Ethical considerations, such as corporate alignment, transparency, and social values, are increasingly influencing influencer selection. Regional variations exist, with France leading in ethical activism and environmental sustainability. Brands are placing greater emphasis on how well influencers resonate with their target audiences, contributing not only to campaign goals but also to broader marketing and societal values.

“As SM continues to become more and more important, clarity and standardisation needs to keep up.”

VP Marketing, Tourism & Hospitality, budget spend £200K–£500K, UK

THE MOST IMPORTANT KEY PERFORMANCE INDICATORS (KPIs) FOR INFLUENCER MARKETING

Engagement rate (70%) and reach (57%) are the most commonly used KPIs for measuring influencer campaign success across Europe.

“People want honest creators, brands want sales and clear results. With tools and standards the industry gets stronger and easier to work with. These trends make influencer marketing more real, long-term and trusted.”

Digital Director, Advertising Agency, budget spend €25K–€50K, Nordics

France & UK

Most likely to track EMV

42% & 34%

Germany

Strongest on reach

71%

Italy

Highest focus on ROI/ROAS at 35%



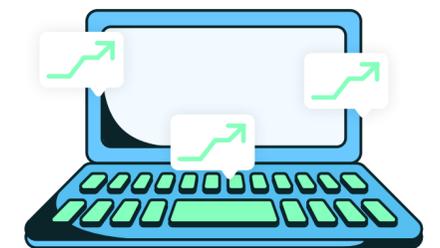
Spain

Strongest lower-funnel tilt—CPA is highest at 27%, and conversions/lead gen is 38%



Nordics

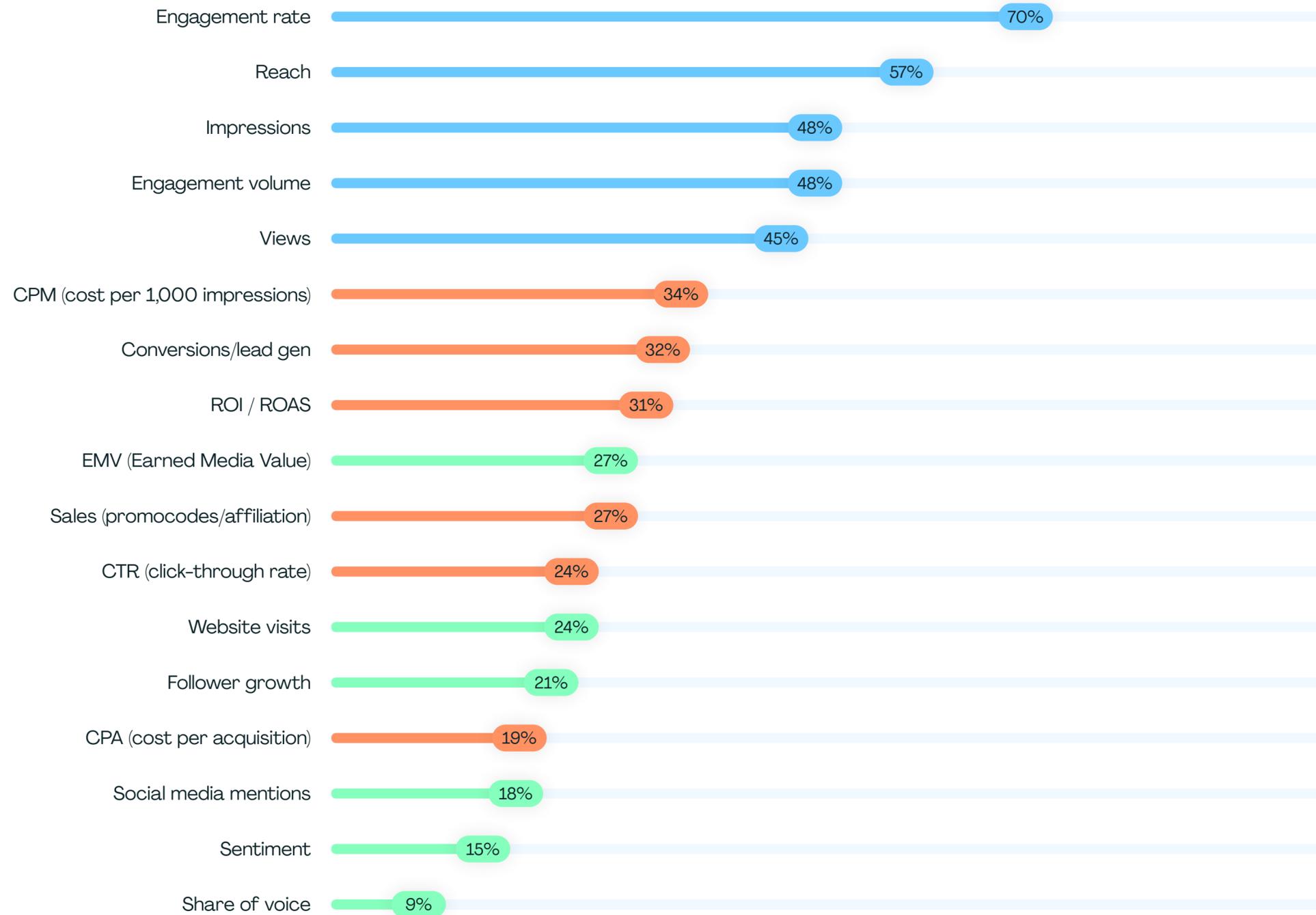
More analytical — higher attention to CPM (38%) and website visits (33%).



THE MOST IMPORTANT KEY PERFORMANCE INDICATORS (KPIs) FOR INFLUENCER MARKETING

BRANDS + AGENCIES

Which KPIs do you most rely on when evaluating influencer marketing campaigns?



■ Engagement & reach metrics
 ■ Performance metrics
 ■ Brand metrics



THE MOST IMPORTANT KEY PERFORMANCE INDICATORS (KPIs) FOR INFLUENCER MARKETING

Top of Funnel: Reach and impressions are prioritised at the top of the funnel, where the focus is on visibility and brand awareness. In France, engagement rate is the #1 top-funnel KPI, followed by reach.

Mid to Bottom Funnel: Engagement and website visits are key indicators at the mid-funnel, while conversions and ROI/ROAS dominate at the bottom funnel, reflecting the performance-driven nature of these campaigns.

“To measure results, it’s important to have transactions linked to influencers. Also, the field needs clearer regulations and contracts.”

Director de Marketing y Ventas, Editorial, budget spend €10K–€25K, Spain

“Content must be snackable — it’s no longer about glossy influencer content but authentic formats. With TikTok Shop and others, social commerce is becoming more important, and our experience shows that affiliate models are very worthwhile for us.”

Head of ATL, Paid and Social Media, Home Appliances, budget spend €1.01M–€3M, Germany

For each KPI you selected, please indicate at which stage(s) of the funnel you typically use it



THE MOST IMPORTANT CRITERIA WHEN SELECTING INFLUENCERS

Influencer content style and audience demographics emerge as the top criteria for selecting influencers across Europe and in most regions. Follower numbers barely rate a mention, confirming the trend of prioritising impact over reach.

As in 2024, the UK leads the pack in selecting influencers from diverse backgrounds, with 23% of brands and agencies nominating diversity as a key selection criteria, compared to the market average of 11%.

50%

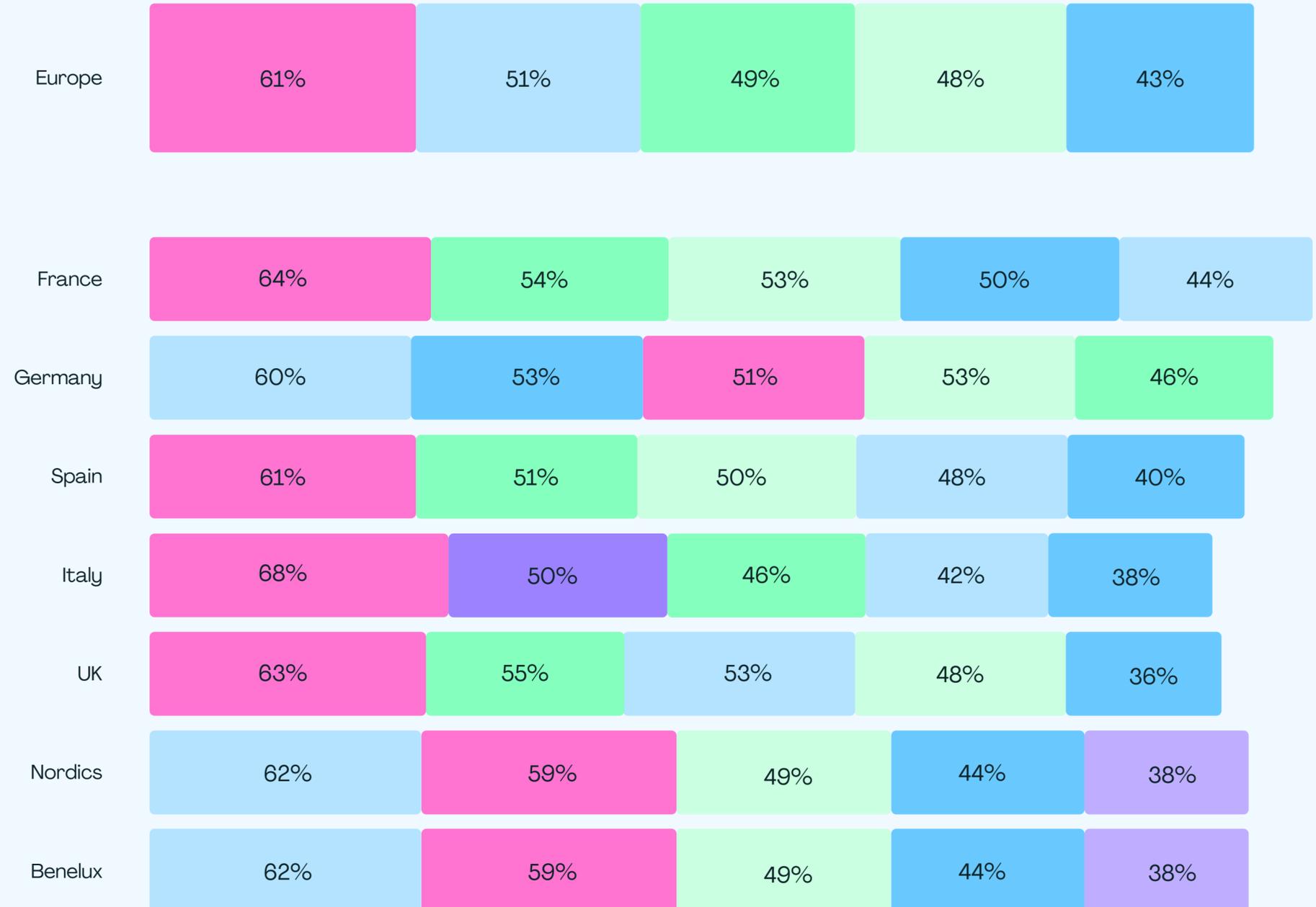
of Italian marketers consider ethical conduct and transparency as key criteria when selecting influencers.

“It’s essential that creators become increasingly transparent and aligned with the brand. Moreover, the possibilities of social commerce are becoming more and more interesting.”

Chief Marketing and Sales Officer, Retail, budget spend €200K–€500K, Italy



Which of the following are the most important criteria when selecting an influencer to work with?



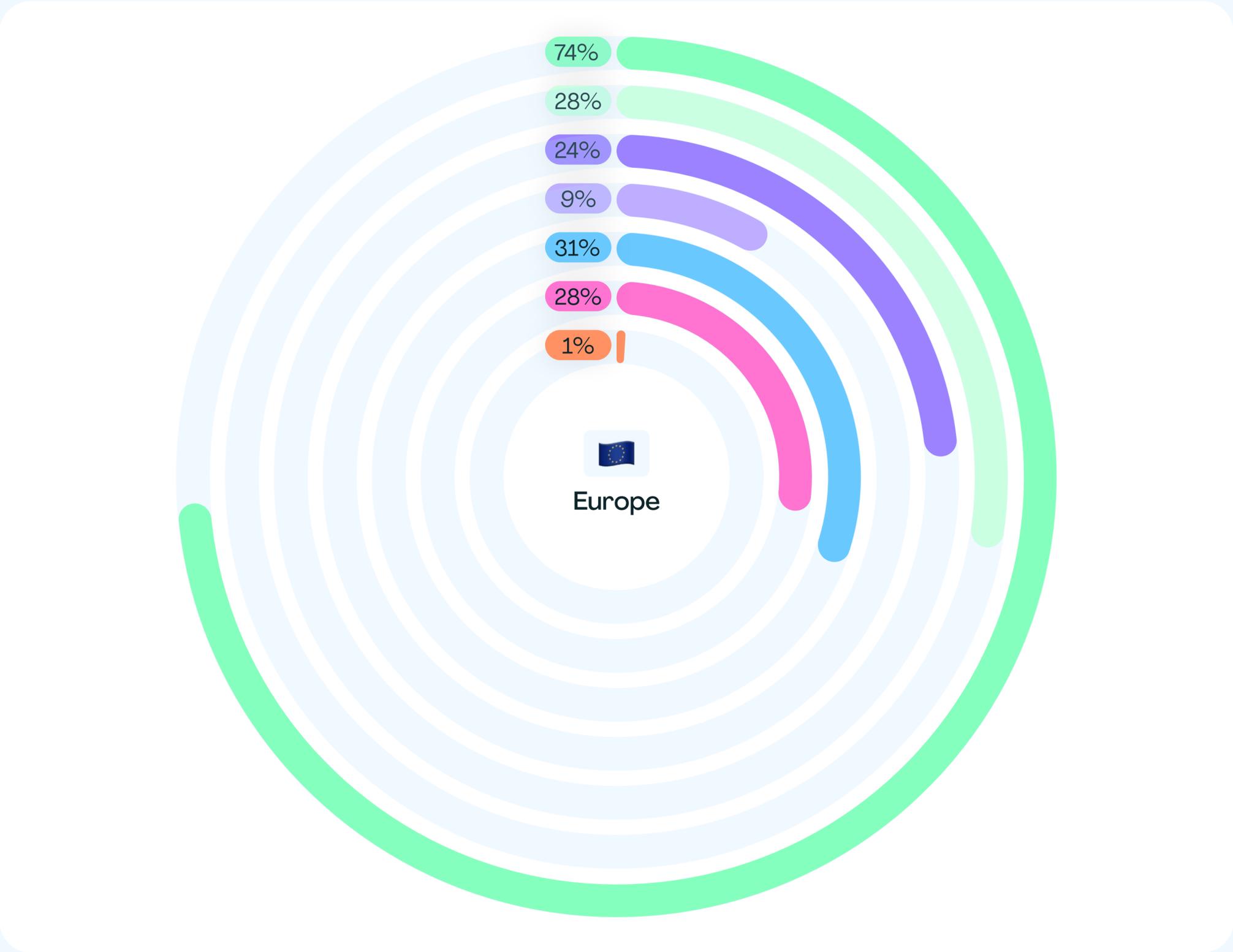
HOW MARKETERS EXPECT INFLUENCER PRICING AND TRANSPARENCY TO EVOLVE IN 2026

Compensation Models: Across Europe, fixed fees per post remain the dominant payment method (74%), confirming that most brands and agencies prefer clear, standardised compensation for influencers. Long-term contracts (31%), commission-based models (28%), and hybrid gifting/fee approaches (28%) are also common, showing a balance between transactional and partnership-based strategies. Germany (81%) and France (77%) lead in fixed-fee use, reflecting mature, structured markets, while the UK favours gifting (36%) and affiliate-based payments (34%), pointing to a stronger performance-driven mindset.

What compensation models do you use for influencer collaborations?



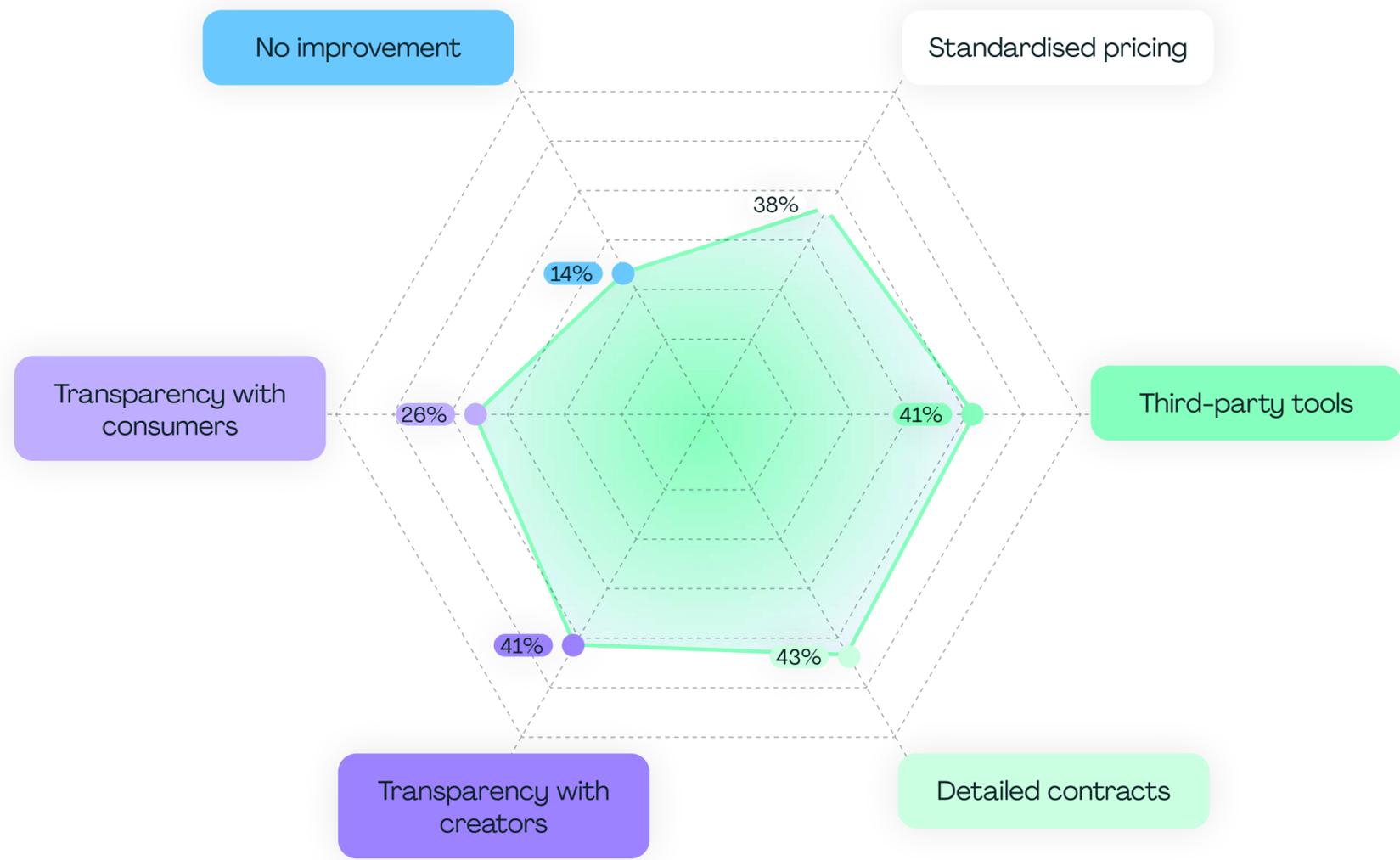
- Fixed fee per post/content
- Long-term contract
- Commission-based (affiliate/sales-based)
- Hybrid gifting/fixed fee
- Product gifting only
- All of the above
- Royalties or licensing fees



Marketers across Europe expect clearer contracts (43%), greater use of verification tools (41%), and more transparency with creators (41%) to define the future of influencer pricing. The UK shows the highest belief in standardised pricing models (44%). Germany and Italy show slightly more scepticism about industry-wide improvements in pricing transparency.

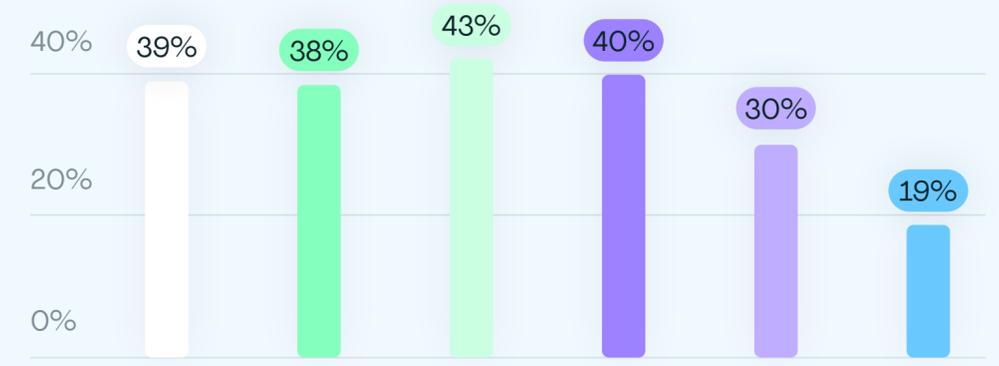
Looking ahead to 2026, in which ways do you expect influencer pricing and fee structures to evolve?

BRANDS + AGENCIES

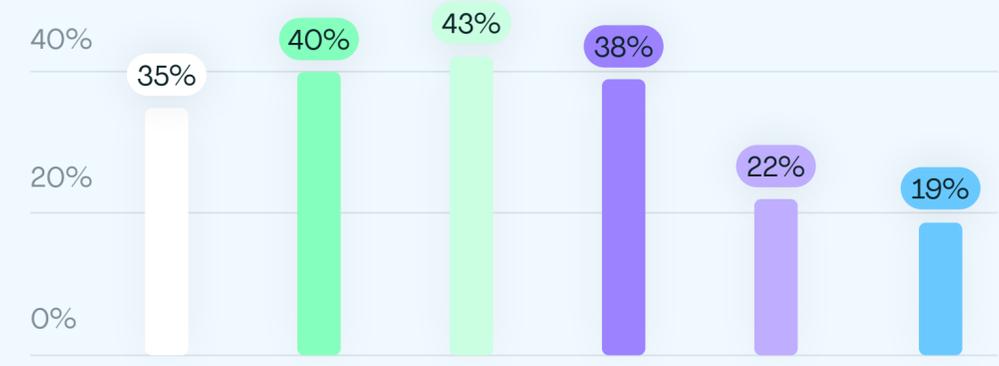


- Standardised pricing
- Detailed contracts
- Transparency with consumers
- Third-party tools
- Transparency with creators
- No improvement

France



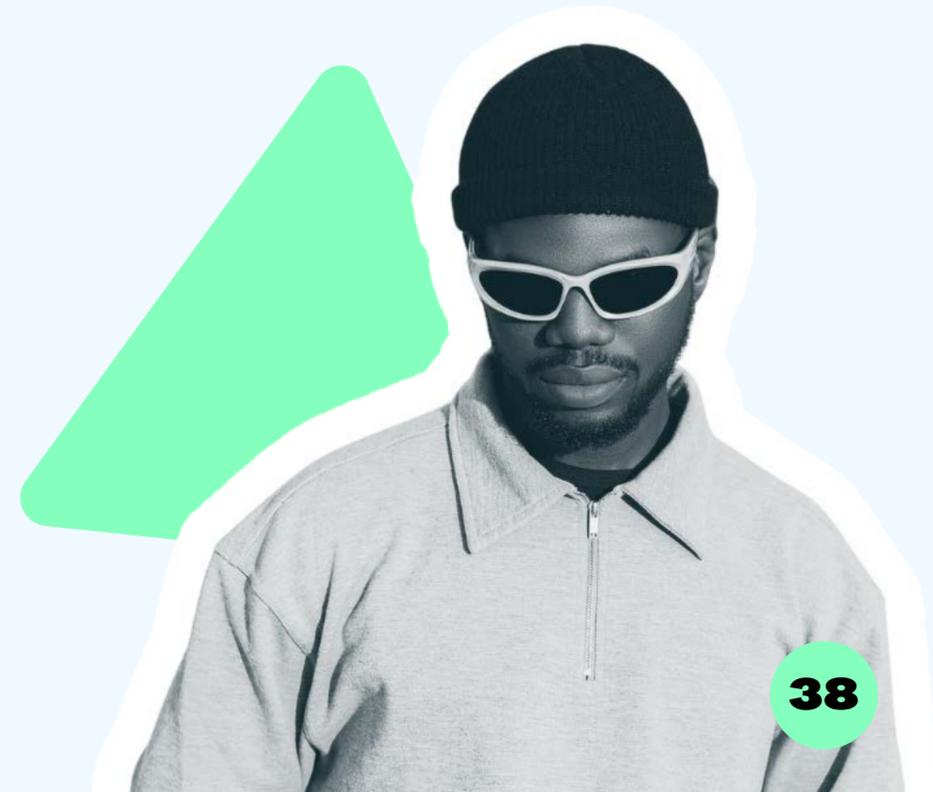
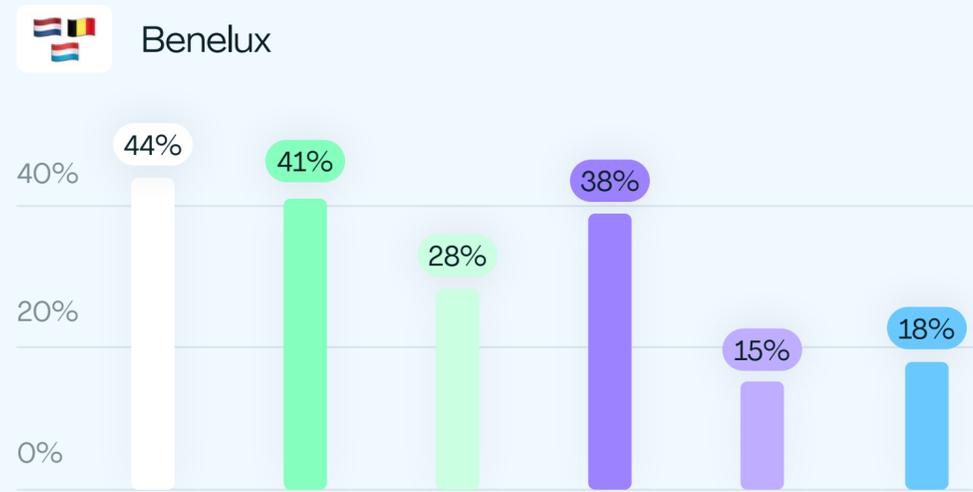
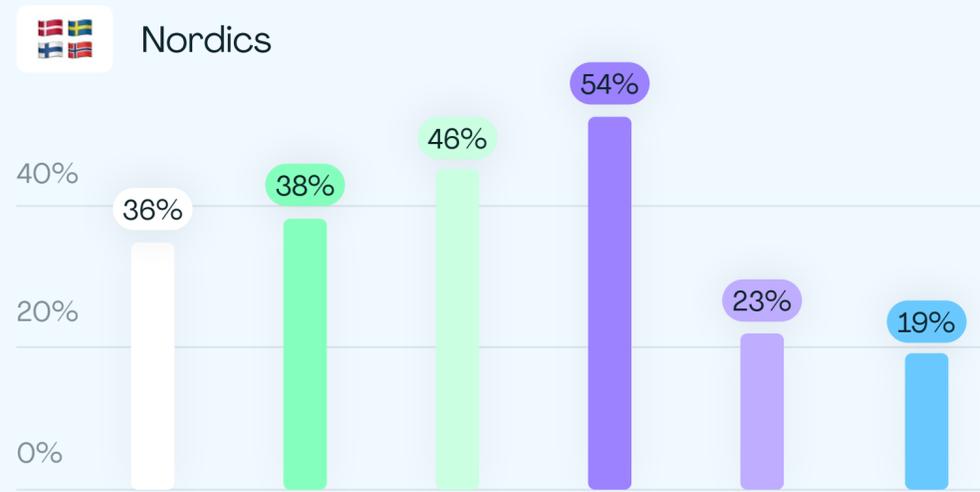
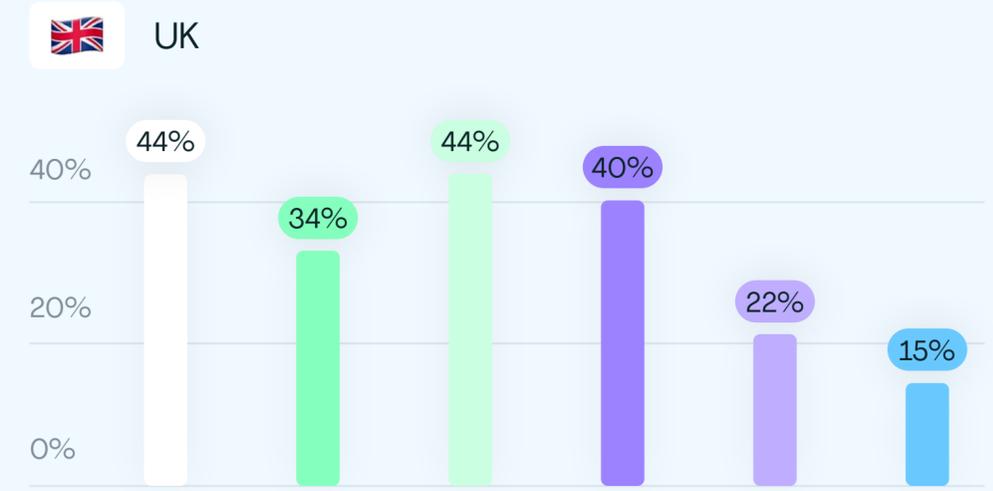
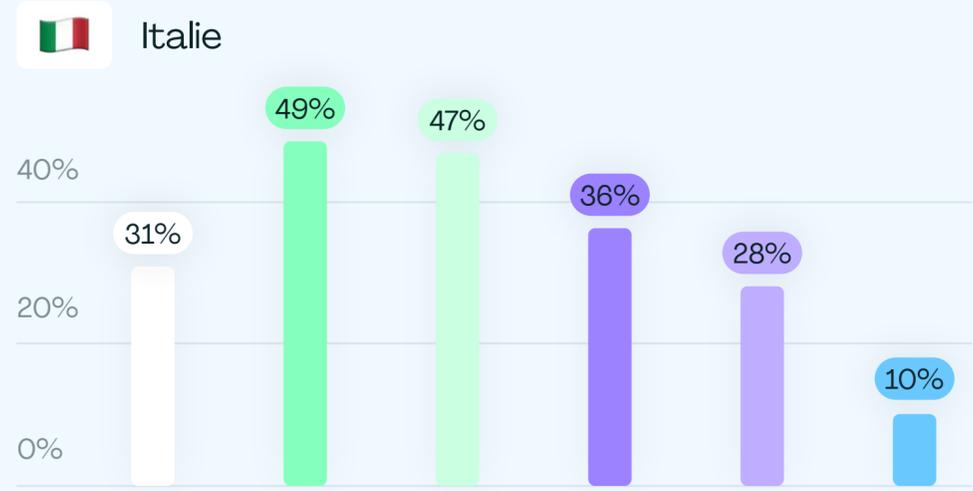
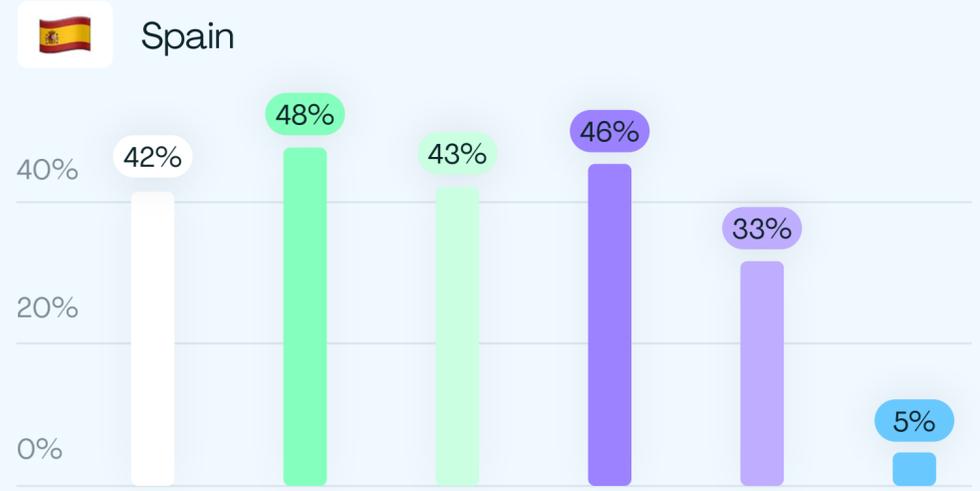
Germany



HOW MARKETERS EXPECT INFLUENCER PRICING AND TRANSPARENCY TO EVOLVE BY 2026

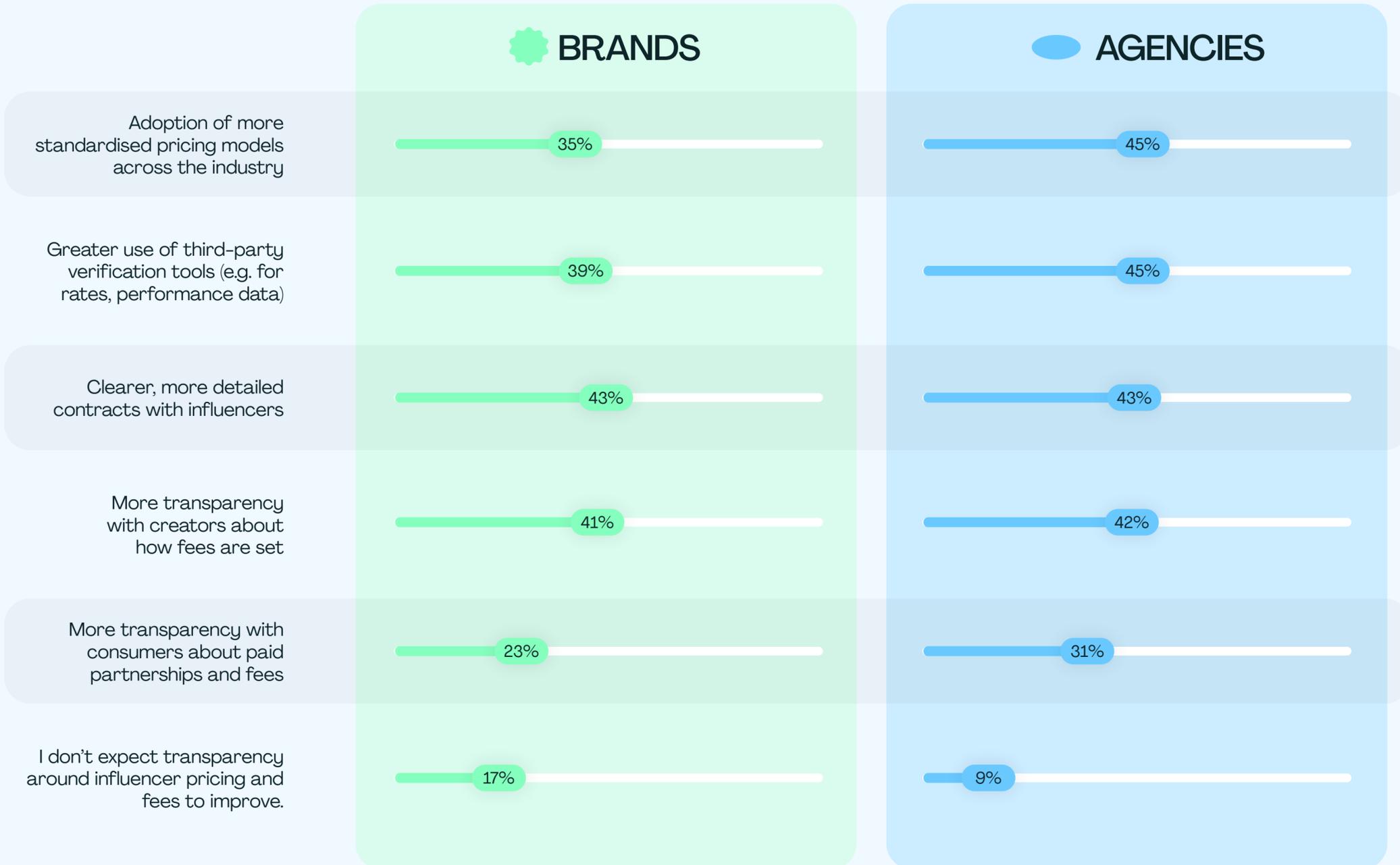
BRANDS + AGENCIES Looking ahead to 2026, in which ways do you expect influencer pricing and fee structures to evolve?

- Standardised pricing
- Detailed contracts
- Transparency with consumers
- Third-party tools
- Transparency with creators
- No improvement



PRICING TRANSPARENCY 2026: AGENCIES LEAD THE WAY, BRANDS STAY CAUTIOUS

The industry aligns on clearer contracts but diverges on optimism: 45% of agencies foresee standardised pricing, compared with only 35% of brands. Twice as many brands as agencies believe transparency won't improve, a clear sign that agencies are more confident in market evolution.



France

Brands notably more pessimistic: 19% say transparency won't improve (vs. 20% among agencies — both high compared to EU average).



UK



Agencies lead on transparency with creators (51% vs. 33%), confirming their proactive role in compliance.

Italy



Both groups value verification tools highly (Agencies 53%, Brands 47%).

Spain



Agencies are far more optimistic (56% vs. 32%) on standardisation and transparency.

Nordics



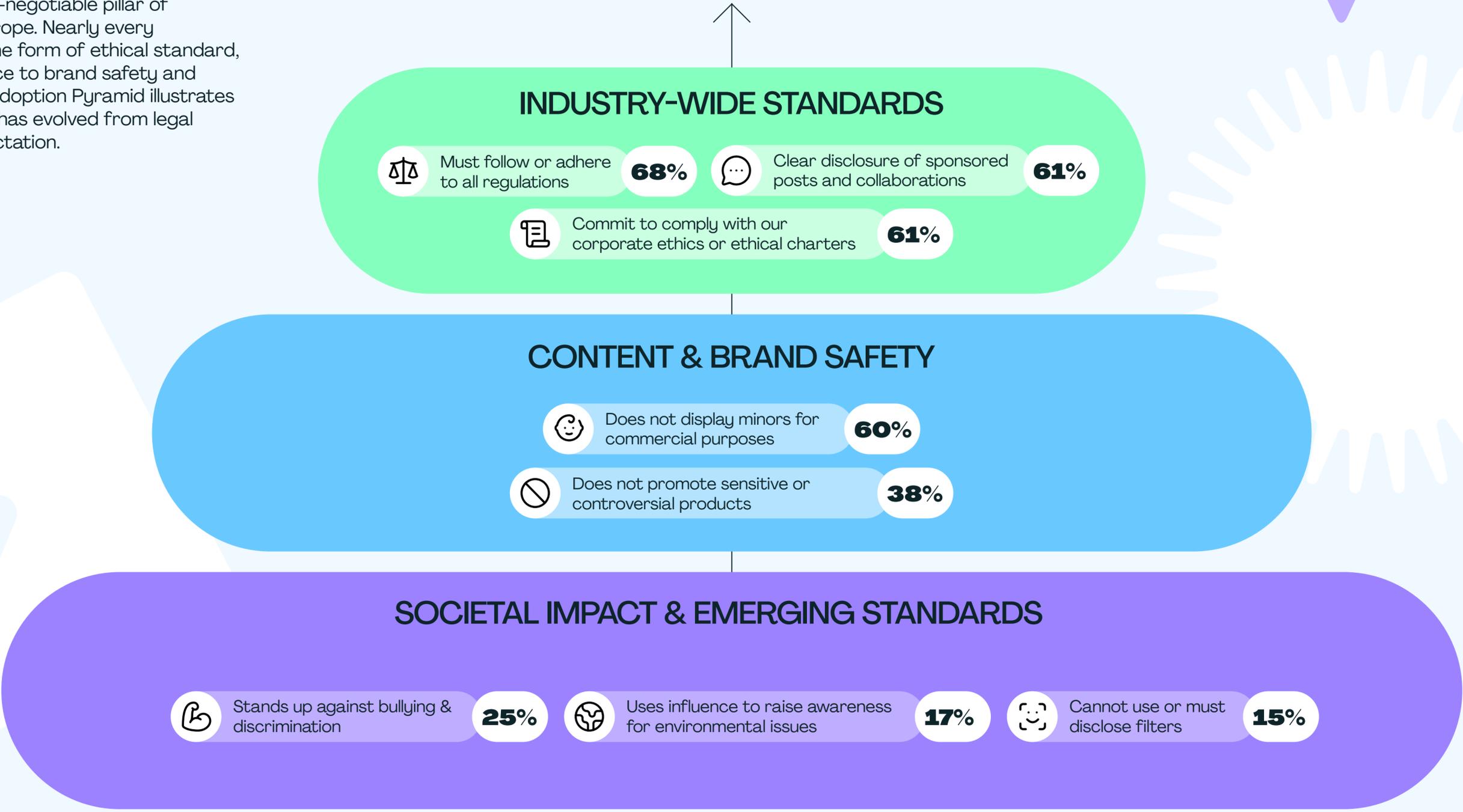
Both groups highly favor transparency with creators (64% brands, 36% agencies) — interesting reversal showing cultural influence.

RESPONSIBLE INFLUENCE 2026: FROM COMPLIANCE TO CONSCIENCE

Ethics have become a non-negotiable pillar of influencer marketing in Europe. Nearly every organisation enforces some form of ethical standard, from regulatory compliance to brand safety and social impact. The Ethics Adoption Pyramid illustrates how responsible influence has evolved from legal necessity to cultural expectation.

BRANDS
+ AGENCIES

What ethical or behavioral conditions do you apply to influencers you partner with?



HOW EUROPEAN MARKETERS REGULATE INFLUENCER BEHAVIOUR

Ethical Criteria: The top ethical consideration for brands is corporate ethics (61%), followed by the transparency of sponsored posts (61%).

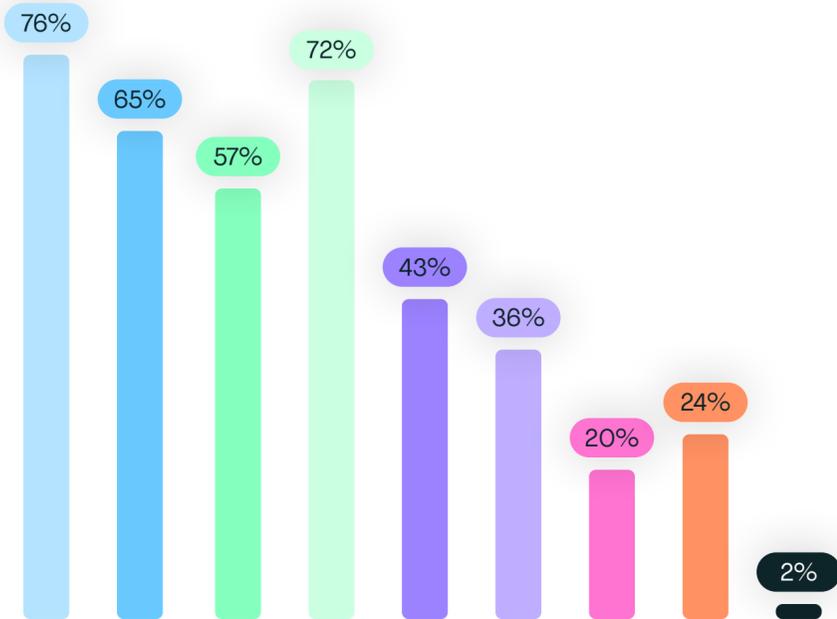
Regional Variations: France and Spain show strong preferences for anti-bullying stances and filter transparency, while Germany and the UK prioritise corporate alignment and disclosure.



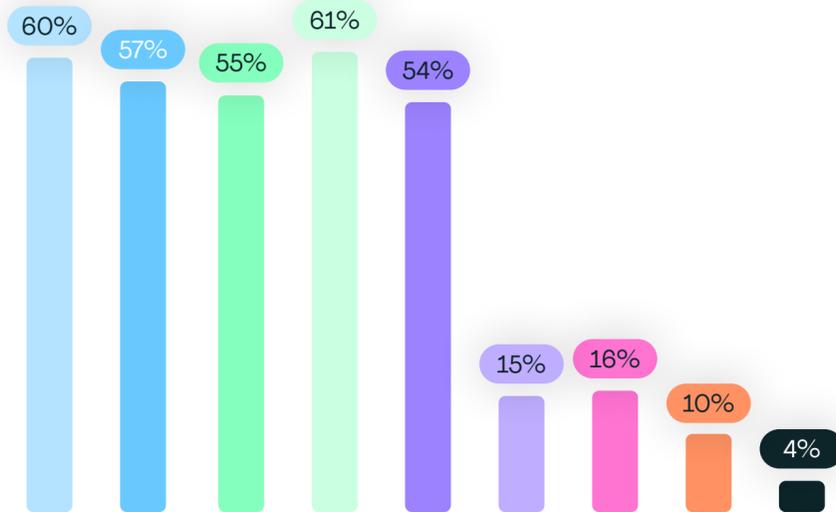
What ethical or behavioural conditions do you apply to influencers you partner with?

- Must follow or adhere to all regulations (e.g., advertising requirements)
- Clear disclosure of sponsored posts and brand collaborations
- Commits to comply with our corporate ethics or ethical charters
- Does not promote sensitive or controversial products (e.g. alcohol, tobacco, cosmetic surgery, etc.)
- Does not display minors (e.g., own children) for commercial purposes
- Stands up against bullying and discrimination
- Uses influence to raise awareness for environmental issues and/or climate change
- They cannot use filters or must disclose the filters they use
- We do not require or apply any ethical or behavioral restrictions to influencers

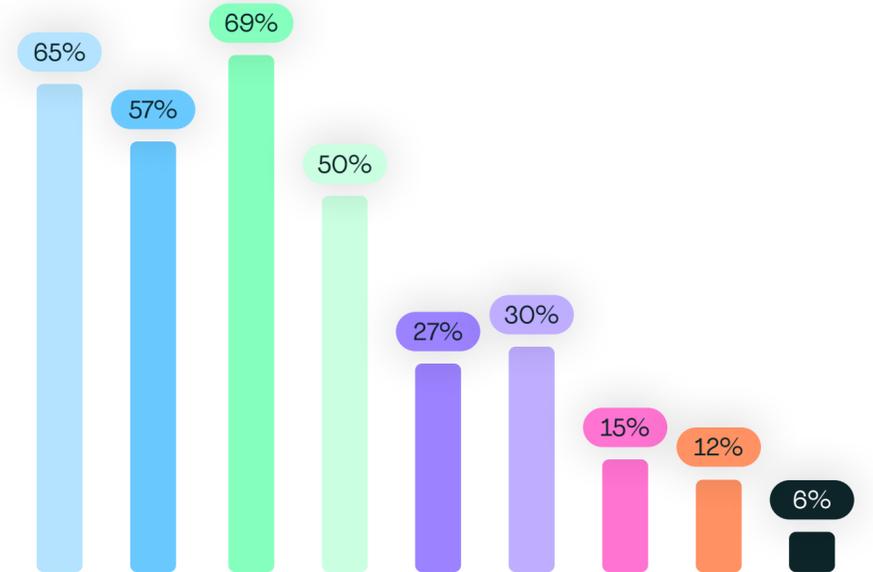
France



Germany



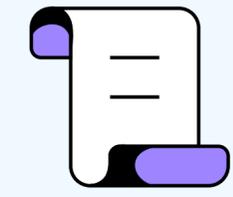
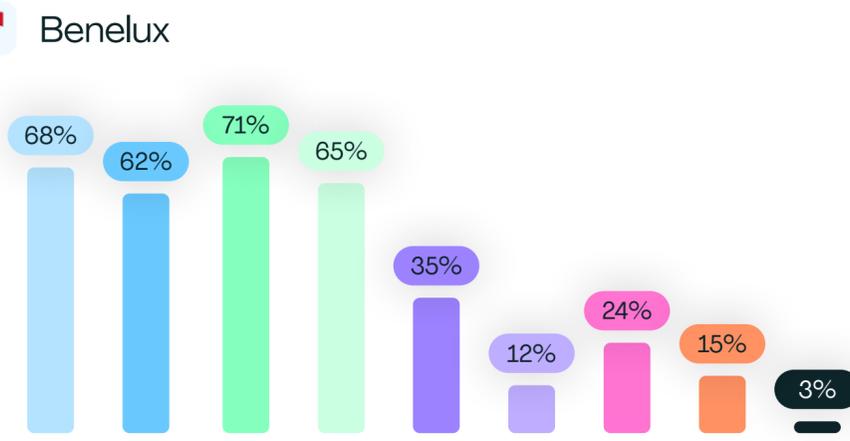
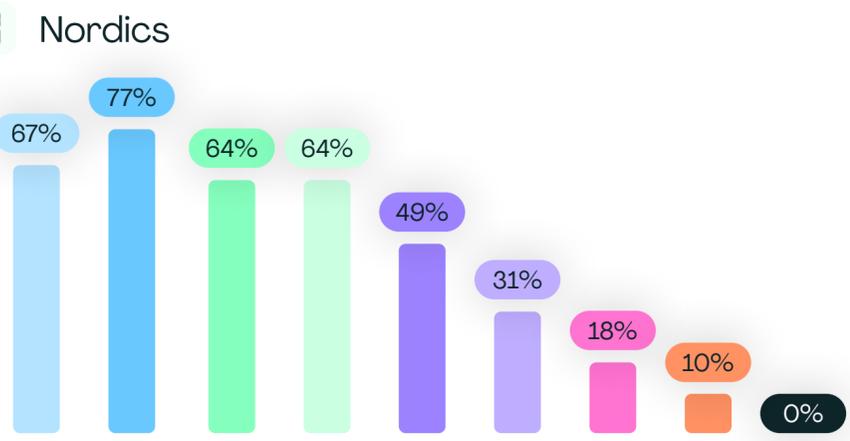
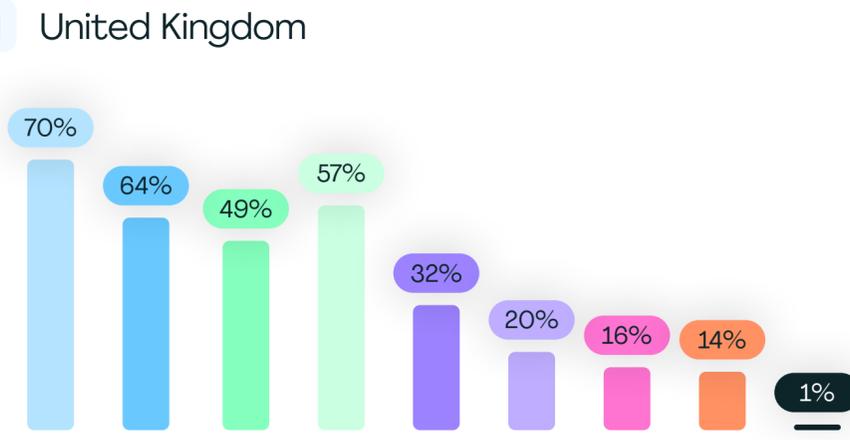
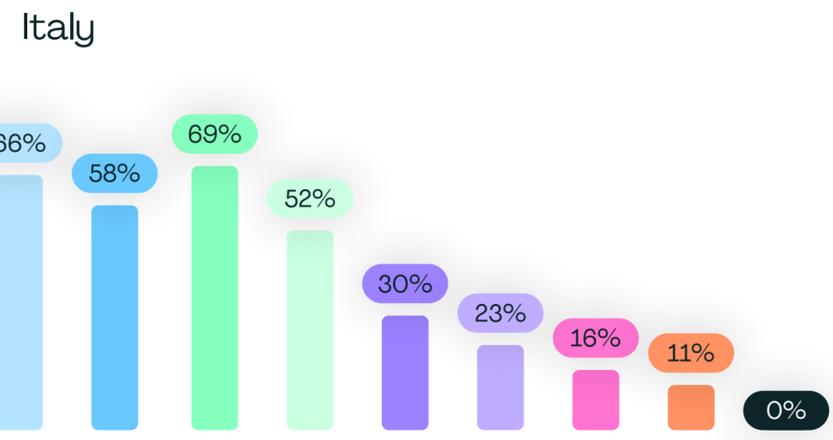
Spain





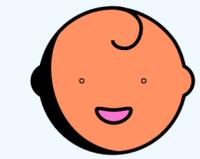
What ethical or behavioural conditions do you apply to influencers you partner with ?

- Must follow or adhere to all regulations (e.g., advertising requirements)
- Clear disclosure of sponsored posts and brand collaborations
- Commits to comply with our corporate ethics or ethical charters
- Does not promote sensitive or controversial products (e.g. alcohol, tobacco, cosmetic surgery, etc.)
- Does not display minors (e.g., own children) for commercial purposes
- Stands up against bullying and discrimination
- Uses influence to raise awareness for environmental issues and/or climate change
- They cannot use filters or must disclose the filters they use
- We do not require or apply any ethical or behavioral restrictions to influencers



Regulation & Compliance

Agencies are stricter about regulatory adherence and transparency (74% of agencies vs. 64% of brands require compliance with ad regulations (+10 pts). 71% vs. 56% demand clear disclosure of partnerships (+15 pts).



Child & Content Protection

Agencies are more protective on use of minors (46% vs. 34% ban influencers from featuring minors (+12 pts).



Ethical Scope & Formalisation

Both brands and agencies apply ethical charters at similar levels (around 6 in 10), but their focus differs: agencies operationalise ethics through contract clauses and influencer policies, while brands frame them within their broader corporate responsibility strategy.



Transparency culture gap

Agencies see transparency as part of their work process; brands rely more on trust and authenticity. (Agencies score higher across most external transparency items (regulations, disclosure). Brands slightly higher on "sustainability awareness" (+4 pts).

6

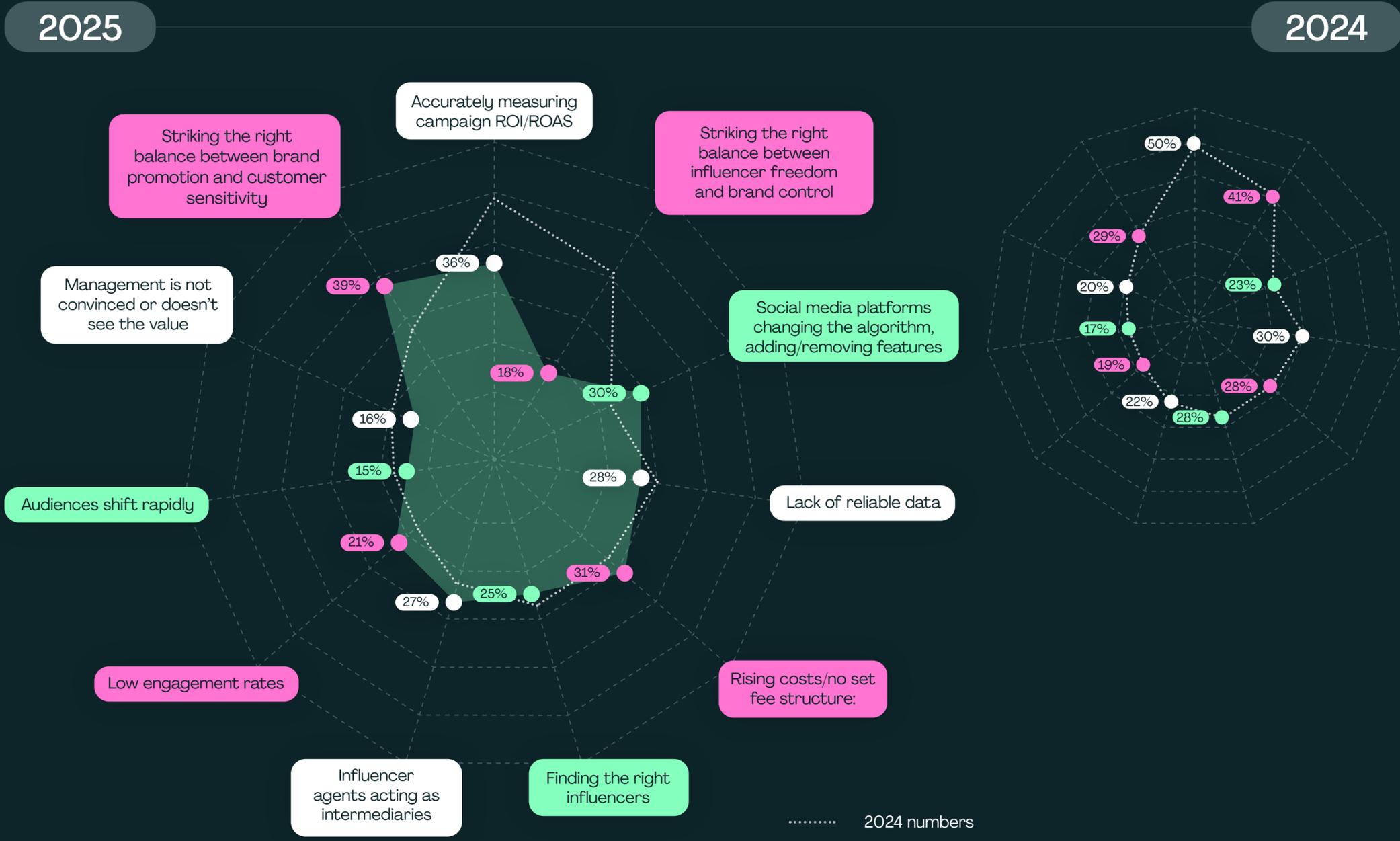
MARKET OUTLOOK: CHALLENGES & OPPORTUNITIES

Influencer marketing continues to face significant challenges, including rising costs and a lack of reliable data. These pain points are compounded by difficulties in identifying the right influencers and the constant shifts in audience preferences. That said, marketers nominated numerous growth opportunities, particularly in the areas of short-form video, paid media integration, and AI adoption. Brands that adapt to these evolving trends will have the potential to scale their influencer marketing strategies effectively and efficiently.

INFLUENCER MARKETING PAIN POINTS SHIFT FROM PERFORMANCE TO PROCESS.

The industry's most pressing challenge is no longer ROI measurement — it's the cost and complexity of doing influencer marketing. Rising fees (31%) and coordination issues with agents (27%) now outrank measurement concerns (36%). Meanwhile, worries around ethics and responsible communication have fallen sharply (-12 pts), showing growing confidence in responsible influence practices.

What are the key pain points when running influencer marketing campaigns today?



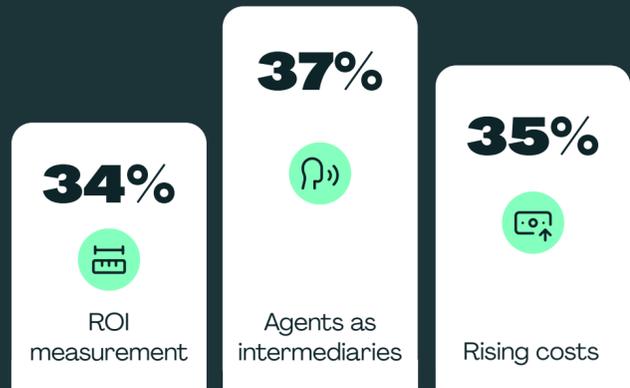
TOP-3 PAIN POINTS BY COUNTRY

While ROI remains a struggle overall, more marketers nominate striking the right balance between influencer freedom and brand control as a key pain point. National priorities differ, from rising costs in Southern Europe to data reliability in the Nordics and issues with dealing with agents in France.

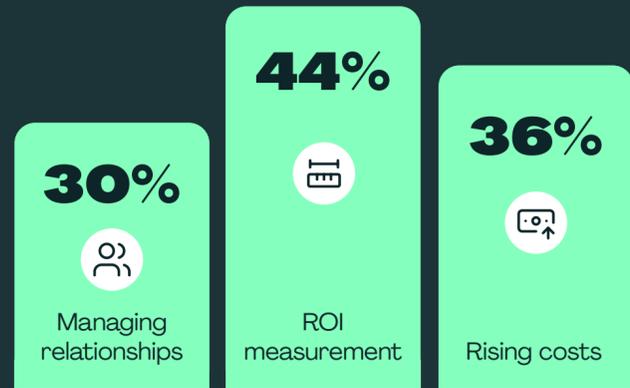
“While AI is standardising contents, channels and tone of voice, differentiation becomes more important than ever, through new channels, new formats and authentic content.”

Marketing Intelligence Manager, Media/Gaming/Entertainment, Budget spend €50K–€75K, Belgium

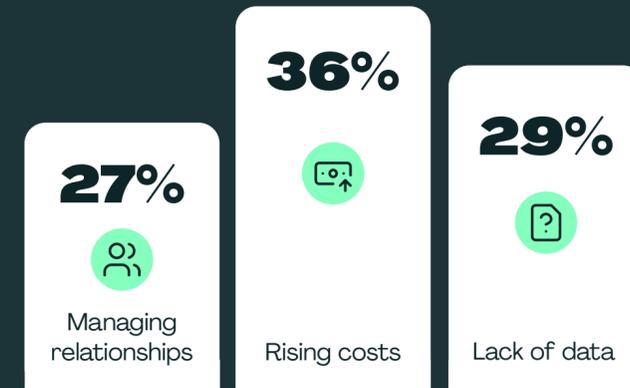
France: Agent friction



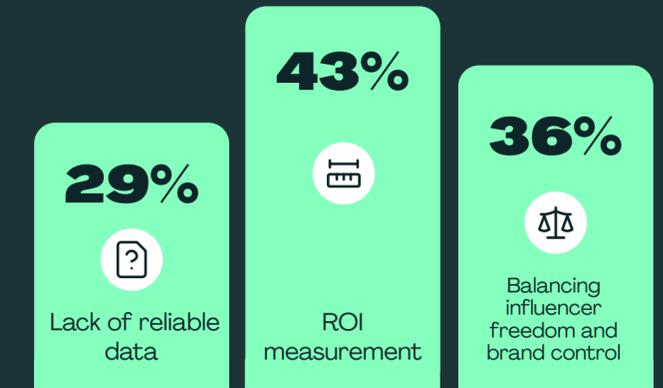
Germany: ROI obsession



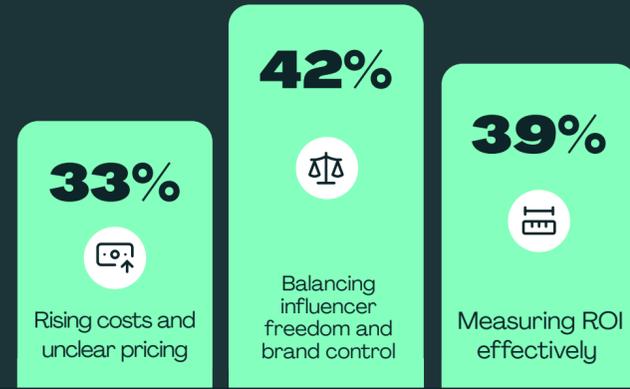
Spain: Cost inflation hits hardest



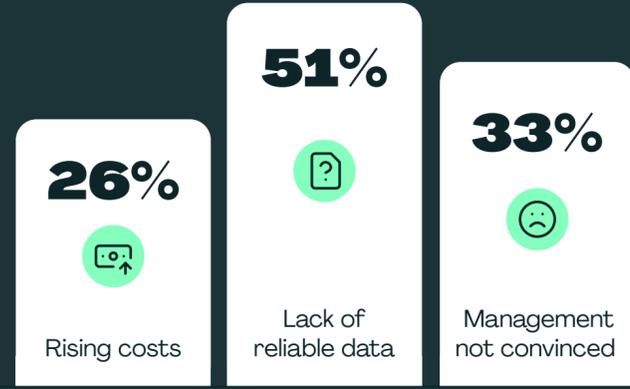
Italy: From ROI to responsibility



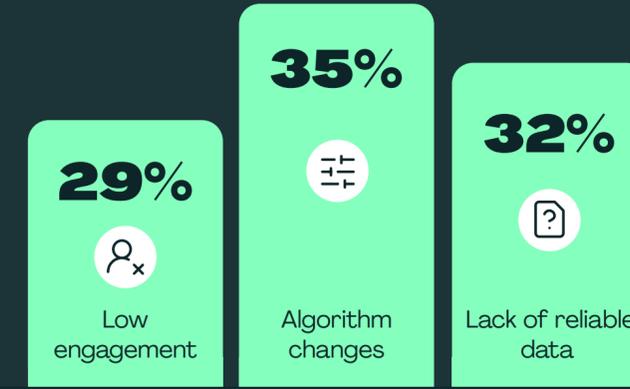
UK: Balancing control, creativity, and rising costs



Nordics: Data dilemma



Benelux: Chasing visibility in a shifting landscape



BRANDS VS. AGENCIES: TWO VISIONS OF THE FUTURE

AGENCIES

AGENCIES LEAD ON PERFORMANCE.

They're more optimistic about deeper integration of influencer content into paid media and the rise of social commerce. Agencies also anticipate faster professionalisation of the industry and the emergence of new monetisation models for creators.

“Integration into paid media campaigns to give dignity and value to the content created; always-on for continuity and consistency of storytelling and product–influencer association, with the option to directly support sales.”

Digital Director, Marketing Agency,
Budget spend €200K–€500K, Italy

BRANDS

BRANDS FOCUS ON VALUES.

Marketers on the brand side place more emphasis on authentic, purpose-driven collaborations and see long-term partnerships as the key to sustainable influence.

BRANDS +AGENCIES

SHARED VISION.

Both agree that short-form video (TikTok, Reels, Shorts) will keep dominating and that AI and always-on strategies are now part of everyday influencer marketing operations.



THE FUTURE OF INFLUENCE: PERFORMANCE MEETS PURPOSE

Opportunities: Short-form video growth (54%) and paid media integration (52%) are identified as the top opportunities in influencer marketing, reflecting the increasing importance of performance-driven campaigns.

Regional Insights: Italy leads in AI optimism (52%), and the UK is focused on paid media amplification and values-driven creators. France and Germany show higher concern about costs and data reliability, while Spain is more focused on content integration and authentic creators.

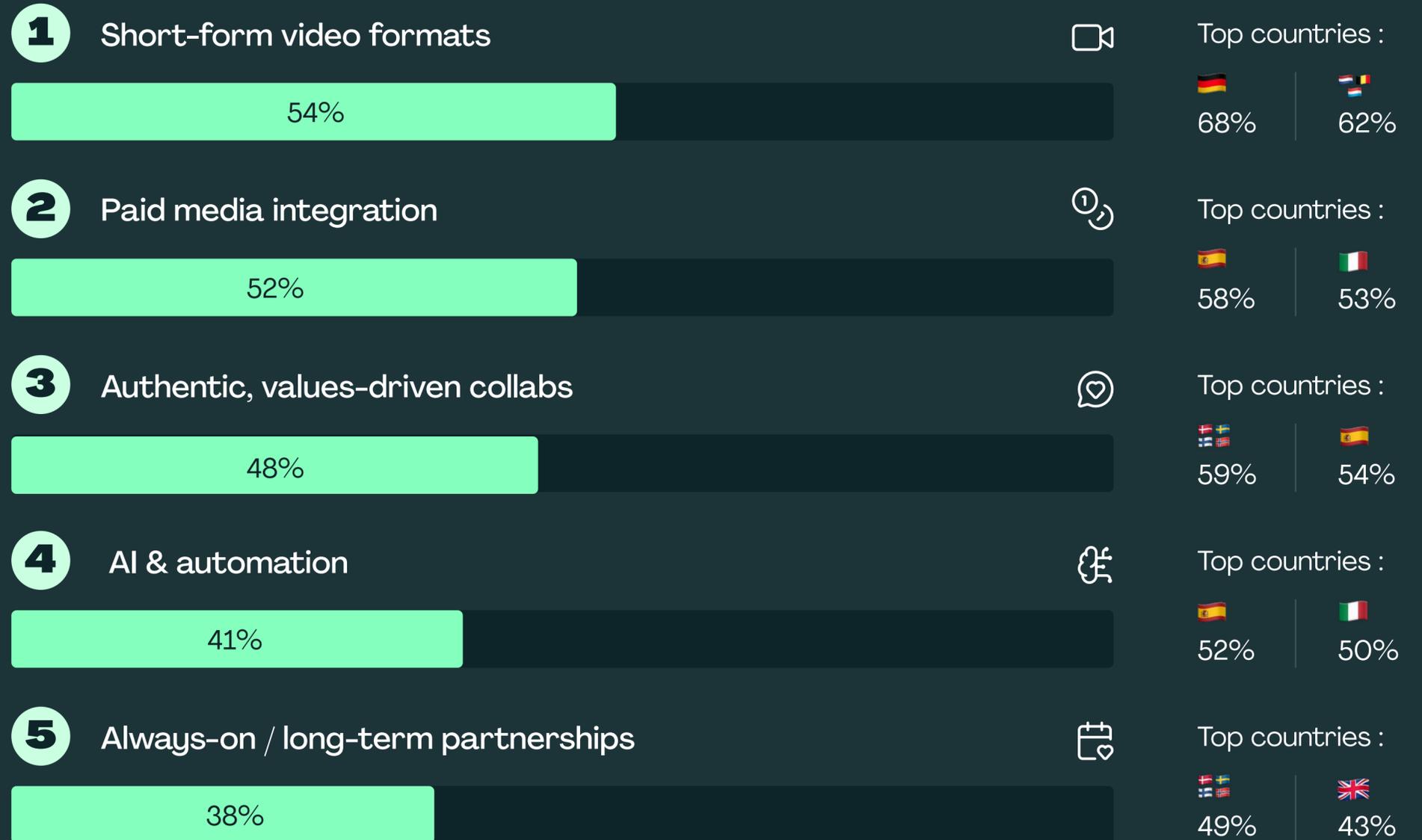
“The growth of social commerce represents undeniable opportunities for influencer marketing because it couples two complementary marketing and sales channels via a single, simple funnel.”

Head of Digital Marketing, Marketing Agency,
budget spend €500K–€1M, France

“[Integration into paid media and always-on strategies] are things I am considering as strategic pivots to move away from short-term splash models where we work with influencers once and never again. Also considering new and emerging platforms where we haven’t explored partnerships before. The standardisation will help us scale sustainably.”

Social Media Lead, AI (Other sector),
budget spend £5M+, United Kingdom

What do you see as the biggest opportunities for the influencer marketing industry in the year ahead?



ABOUT KOLSQUARE

Kolsquare is Europe's leading Influencer Marketing platform, a data-driven solution that allows brands to scale their KOL Marketing strategies and implement authentic partnerships with KOLs (Key Opinion Leaders).

Kolsquare's technology enables marketing professionals to easily identify the best Content Creators' profiles by filtering their content and audience, and to build and manage their campaigns from A to Z, including measuring results and benchmarking performance against competitors.

Kolsquare has built a thriving global community of influencer marketing experts, and offers hundreds of customers (Coca-Cola, Netflix, Sony Music, Publicis, Sézane, Sephora,, Lush, Hermès...) the latest Big Data, AI and Machine Learning technologies to drive inspiring partnerships, tapping into an exhaustive network of KOLs with more than 5,000 followers in 180 countries on Instagram, TikTok, X (Twitter), Facebook, YouTube and SnapChat.

As a Certified B Corporation, Kolsquare has been pioneering Responsible Influence by championing transparency, ethical practices, and meaningful collaborations to inspire change.

Since October 2024, Kolsquare has become part of the Team.Blue group, one of the largest private tech companies in Europe, and a leading digital enabler for businesses and entrepreneurs across Europe. Team.Blue brings together over 60 successful brands in web hosting, domains, e-commerce, online compliance, lead generation, application solutions, and social media.



www.kolsquare.com



ABOUT NEWTONX



NewtonX is the only B2B research company that solves the challenges of today's insights leaders by connecting them with verified business expertise. To do this, we built the most sophisticated algorithm in the research industry, the NewtonX Graph. The AI-driven Graph custom recruits the perfect audience for your business question from an open network of 1.1 billion professionals across 140 industries. Every professional is 100% verified, so you can make your next bold move with confidence. Decision quality data is embedded in everything we deliver. We field large-scale quantitative surveys, facilitate qualitative or expert interviews, engage in long-term consultations, and create customized research plans. With our all-access platform NewtonX Prime, we deliver expert intelligence at scale, giving investors an edge via instant access to expert surveys and transcripts.

NewtonX partners with the Fortune 500, top consultancies, marketers, and investors. Together with our clients, we're ushering in a new standard of truth in B2B insights.



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AUTHORS

- Sophie Douez, Journalist
- Lucie Torres, SEO & Content Manager
- Quentin Bordage, Founder + CEO





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