**searchpulse** by **Reflectdigital**

# Search is changing forever. Are you ready?

**Our search habits are changing...**

AI is now a daily habit, and the traditional journey is evolving faster than ever. Learn how to stay visible and build authentic trust in the age of AI.

**SearchPulse Q4 • 2025**
**Travel Edition**

# Your personal AI expert awaits.

**Ready to explore the report in more detail?**

Download the report online to unlock exclusive access to our AI agent - your instant guide to deeper, faster insights.

Ask anything about the findings and explore the data like never before.

**TALK TO OUR AI AGENT**

# Welcome to our latest SearchPulse.

As we begin the new year, one thing became clear for travel brands: search behaviour isn't just changing, it's accelerating, and reshaping how travellers dream, plan, and book their next trip.

This Travel edition of SearchPulse explores how the search journey has evolved from inspiration to booking, and how platforms, social channels, and AI now influence decisions at every stage. What we're seeing isn't a simple shift in tools, but a redefinition of where people search, why they trust certain sources, and how confidence is built before a booking is made.

AI has moved from novelty to a supporting player in travel planning, while zero-click environments and peer-to-peer platforms are increasingly shaping choice. This report is designed to help you understand those behaviours and translate them into action, from multi-platform visibility to building trust when it matters most.

The opportunity for travel brands isn't just to keep pace, but to design search strategies with intention: rooted in human behaviour, informed by data, and aligned to how travellers really decide.

Thank you for reading. We hope this edition leaves you feeling more prepared, more confident, and excited about what's next in 2026.

**Becky Simms**
CEO & Founder, Reflect Digital

## Jump directly to the part of the report you're most intrested in.

**THE SEARCH LANDSCAPE**

**THE TRAVEL REPORT**

# Executive summary.

I didn't think I'd be writing this next sentence so soon, but here we are.

The travel planning landscape is no longer simply "changing"; it has fractured along generational lines. Move over "linear booking path" - the future is a fragmented ecosystem where inspiration, validation, and transaction happen across entirely different platforms depending on who is searching.

For the under-25s, social platforms like TikTok have almost become self-contained travel agents , while the 25-44 demographic has shifted to AI and booking platforms for consideration. Meanwhile, Google Search dominance is now largely restricted to the 45+ demographic.

Our Q4 data confirms that to capture the modern traveller, you must stop treating social media purely as an awareness tool and start optimising for specific generational behaviours.

## 1. AI adoption threshold crossed a full quarter earlier than anticipated.

- **Q4 Highlight:** The mainstream threshold? It's been passed. For the first time, a majority of the people we surveyed (52%) are now using AI search tools at least sometimes. We expected this to happen in Q1 2026.

🔍 | **What YOU can do...**

This shift confirms AI is an essential marketing channel and signals a new baseline for consumer search behaviour. Brands must proactively incorporate AI visibility by optimising content to be concise. Include generative answer plans into your core digital strategy to maintain, or gain relevance.

## 2. Search platforms are fighting to give you the answer now

- **Q4 Highlight:** Google Search is still dominant, but its consistent decline is speeding up. Why? Users are flocking to Google's own AI products like Gemini and AI Mode.

This isn't a fight between platforms; it's a battle for the most efficient answer, and that's often happening inside the search engine before your customer ever clicks.

**Q | What YOU can do...**

The challenge has shifted from simply ranking higher in a SERP to optimising for the "zero-click" conversion. Invest in content architecture (structured data, FAQs, clear authority signals) to ensure your brand's expertise are the source powering these authoritative AI-generated answers.

## 3. AI is rapidly becoming the savvy shopper's secret weapon.

- **Q4 Highlight:** AI's application in e-commerce is clearly focused on value. The leading use cases are transactional and cost-focused: looking for deals, comparing prices, and finding discount codes. This is strongest in the crucial 25-44 age segment.

**Q | What YOU can do...**

Consumers see AI as a tool for affordability, not just convenience. If that's your core demographic, you need to optimise your product info, offers, and value propositions to be easily recommended and read by AI assistants. The brands that make finding savings frictionless with AI are the ones who are going to win serious loyalty.

We understand that navigating this new normal where AI crosses over, but still contends with deep-seated trust issues, is complex.
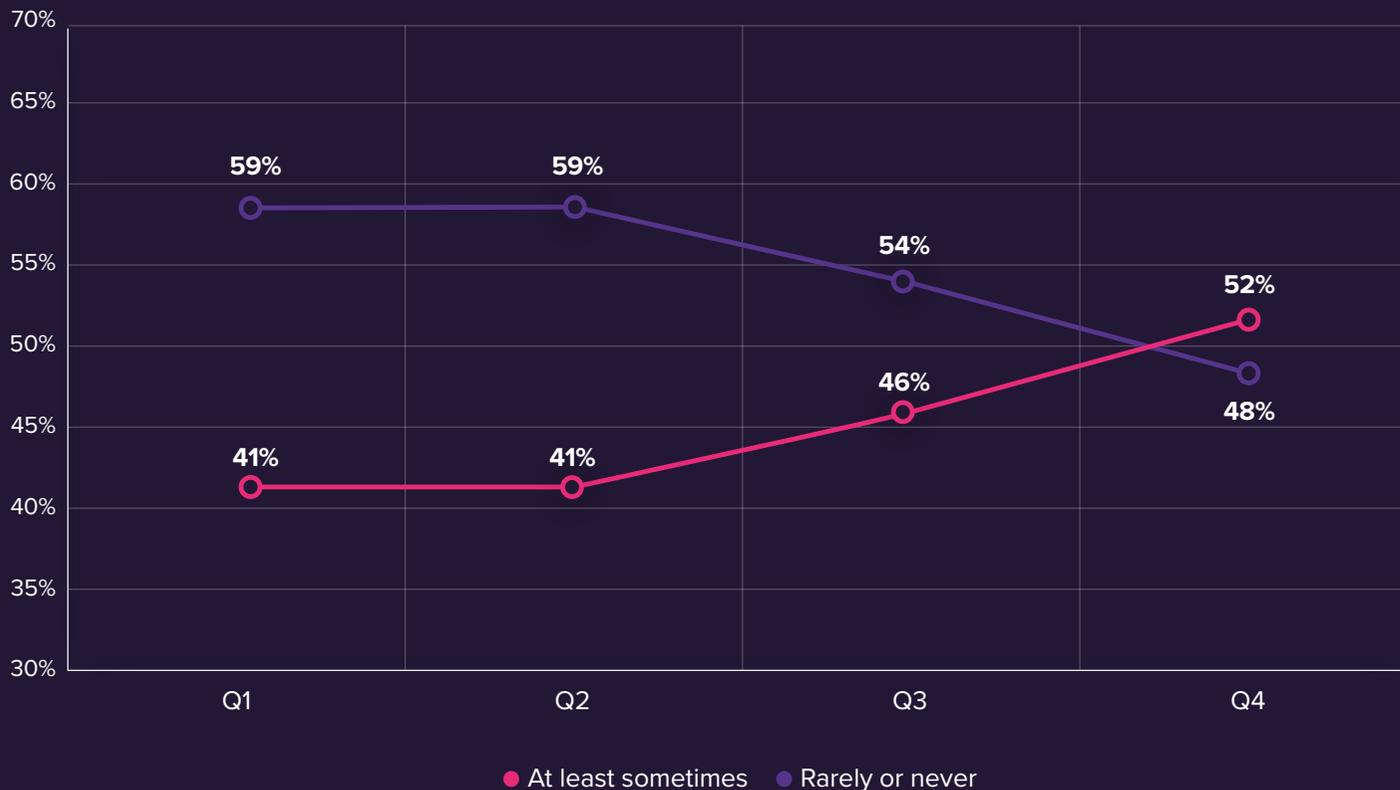
The brands that succeed will be those that deeply understand the intent behind the search at every funnel stage, from inspiration on social media to the final transactional click on a dedicated booking site.

If you can ground your strategy in the human needs driving these technological shifts, you can ensure your brand remains visible, relevant, and ready for whatever future change comes next.

**Azeem Ahmad**
Strategy Director

# AI adoption threshold crossed a full quarter earlier than anticipated.



For the first time since the survey launched in Q1 2025, we are seeing more respondents using AI tools at least sometimes than rarely or not at all.

Adoption is still increasing, it appears, indicating marketing efforts that place brands in AI spaces is still a valuable (and ever increasingly so) endeavour.

Q3. How often, if ever, do you use AI tools, like ChatGPT, to search?, n=8000 | Reflect Digital SearchPulse Q4 2025

● At least sometimes   ● Rarely or never

# Reflect reacts.

As we predicted in Q3, albeit earlier than anticipated, the cross-over between those who, at least sometimes, use AI tools and those who rarely or never use it, has occurred. Within our survey sample, the use of AI tools now accounts for a significant proportion of total search activity for a majority of respondents.

We're no longer in the early adopter stage - we're firmly planted in AI being an 'early majority' behaviour, and regardless of how we feel about this, it's imperative that AI is a part of the overall digital strategy in some way; whether that's being visible within AI responses for search terms, or implementing AI tools on websites as it becomes an ingrained part of consumer decision making.

It's unlikely a blanket approach is the answer though. AI's use will be dependent upon intent and purchase funnel stage. But as AI platforms introduce checkout experiences, it could well be that AI becomes an integrated, end-to-end channel.

**The time for asking questions is over, now you need to take action.**

**Ed Cox**
Behavioural Insights & Analytics Lead

# The real battle in search is winning attention before a click, by knowing how your audience behaves.
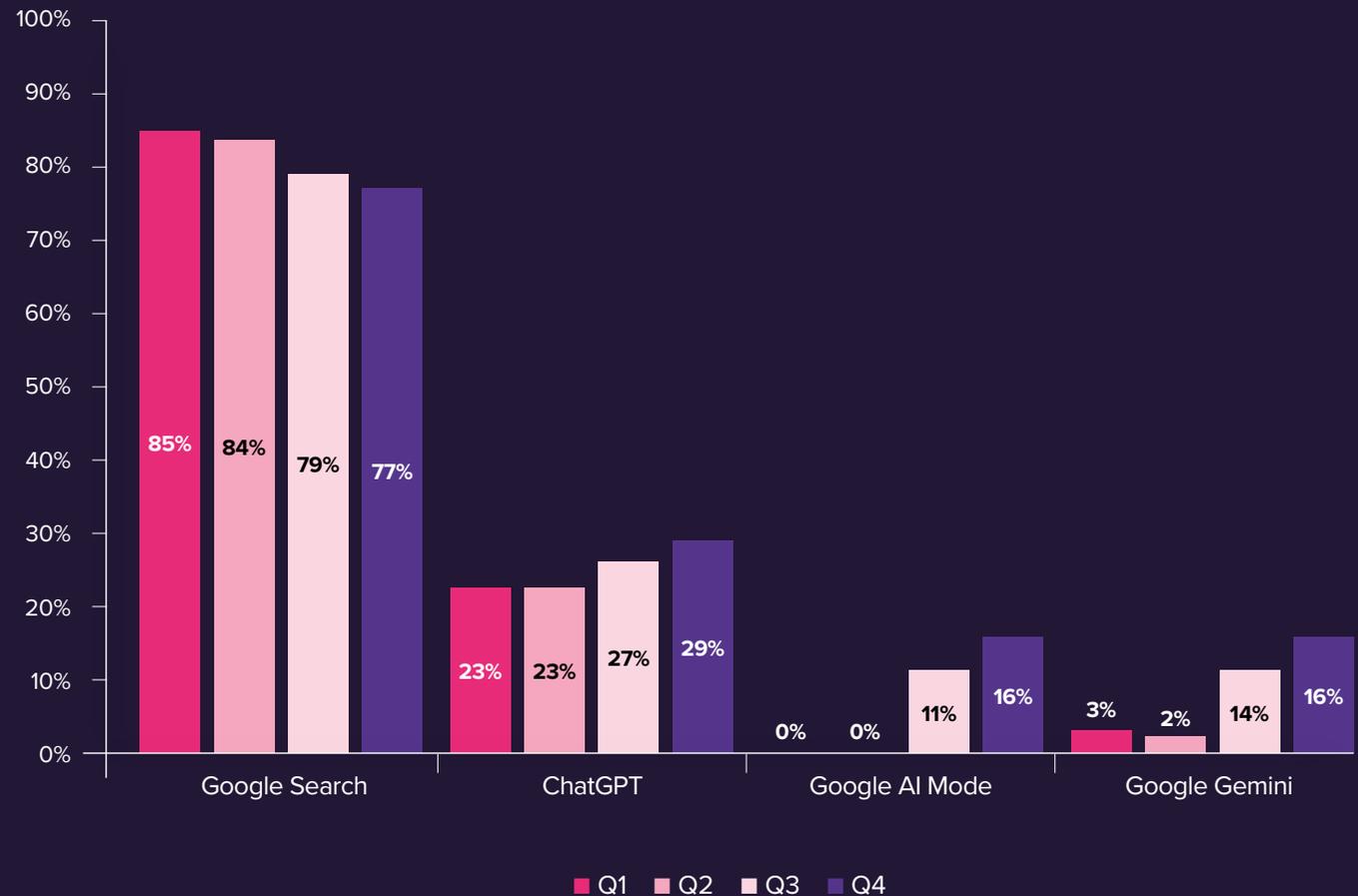
# Google Search use is steadily declining, and it's changing how your customers find you.

Now we have a full year of data, we can see some interesting trends that have been consistent quarter-on-quarter.

Google Search does appear to be in steady decline, despite still holding a significant advantage over second-placed YouTube.

Conversely, ChatGPT has seen a QoQ steady increase and is now used by just under 30% of respondents.

Google AI mode and Gemini have also seen increases QoQ, although Gemini's figures are inflated as the first two surveys labelled it 'Bard', which was already a retired branding.



Bar chart showing usage percentages by quarter (Q1, Q2, Q3, Q4):

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| Google Search | 85% | 84% | 79% | 77% |
| ChatGPT | 23% | 23% | 27% | 29% |
| Google AI Mode | 0% | 0% | 11% | 16% |
| Google Gemini | 3% | 2% | 14% | 16% |

Q1. What online tools, if any, do you use to search regularly?, n=8000 | Reflect Digital SearchPulse Q4 2025

# Strategic insight.

Users aren't leaving Google, they are leaving the 10+ link SERP to experience faster, conversational AI summarised experiences. The main goal is now no longer a click through to your website, but to be visible within the AI answers.

### Q | What YOU can do...

Future proof your content for AI answers. Think about structured data across your content - and focus on **E-E-A-T signals**, as authoritative sources are often preferred for AI summaries.

## E-E-A-T:
### Experience, Expertise, Authoritativeness, & Trustworthiness.



It's a framework used by Google to evaluate the quality of content and websites.

Content that demonstrates real-world experience, expert knowledge, credible sources, and overall trustworthiness is more likely to perform well in search.

# ChatGPT and Gemini are democratising GenAI use.

**ChatGPT and Gemini** are becoming more accessible.

Users of these 'Mainstream AI' platforms are recognising that they get search results faster and are getting a more personalised search experience.

With more use and familiarity that AI will provide personal responses, it's likely that users will also consider these AI platforms on more 'personal' terms and become more trusting of these platforms.

**Visibility in ChatGPT and Gemini is therefore becoming more important for brands,** especially for driving awareness for the general public.

Dive deeper into the **Four Human Drivers of Search Behaviour**.

**READ BLOG**

Crowd-Sourcing

Taste-Tuning

Fact-Finding

Auto-Pilot
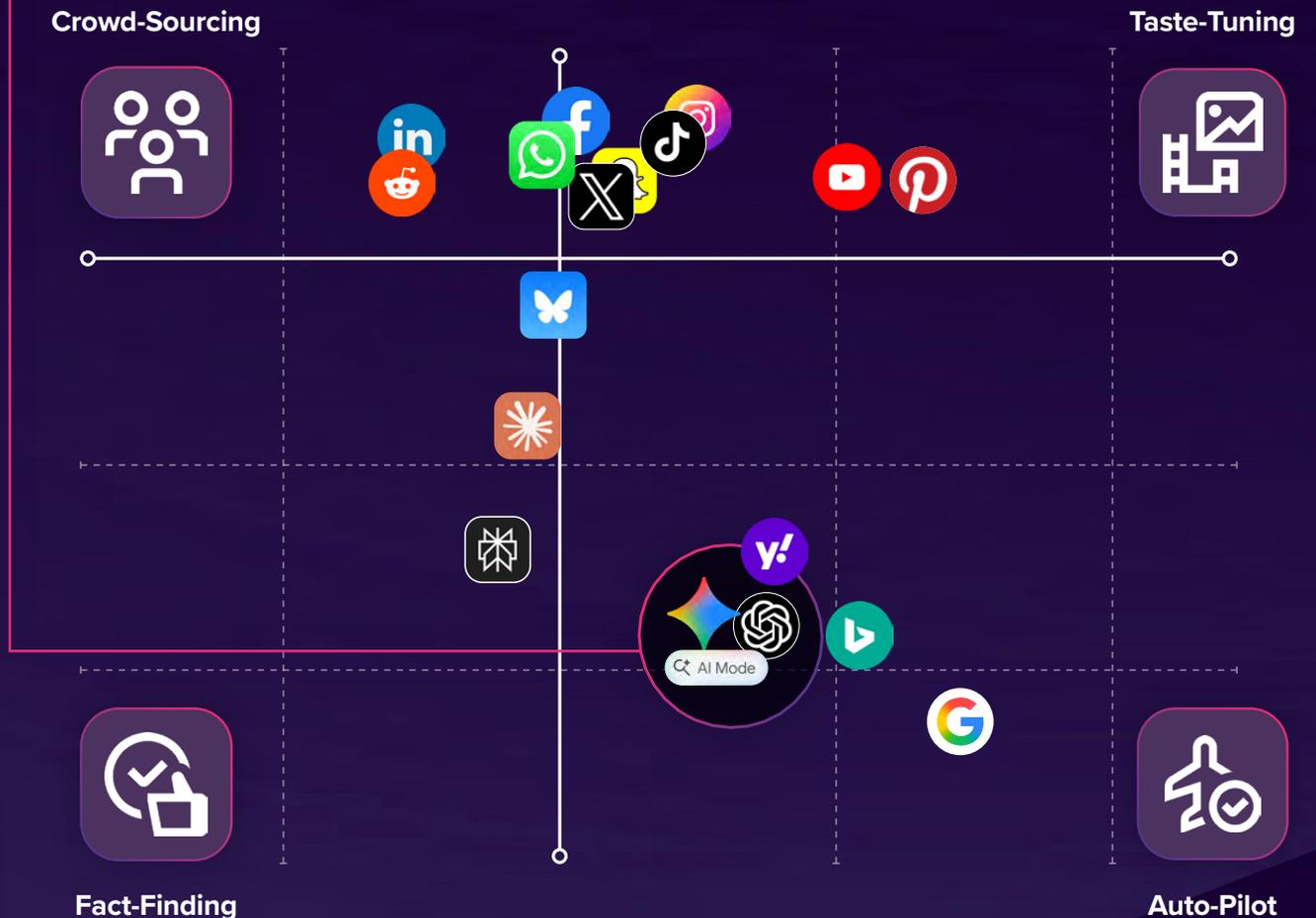
Defaults

People tend to stick to the 'default' choice and prefer to carry on behaving as they have always done

The **Default Effect** has been one of the reasons the use of Google Search has remained so strong.

As Google Search changes and incorporates more and more AI-generated content, the effect starts to work in the other direction.

Rather than **people moving towards AI, AI may be moving towards people** and increasing their usage.

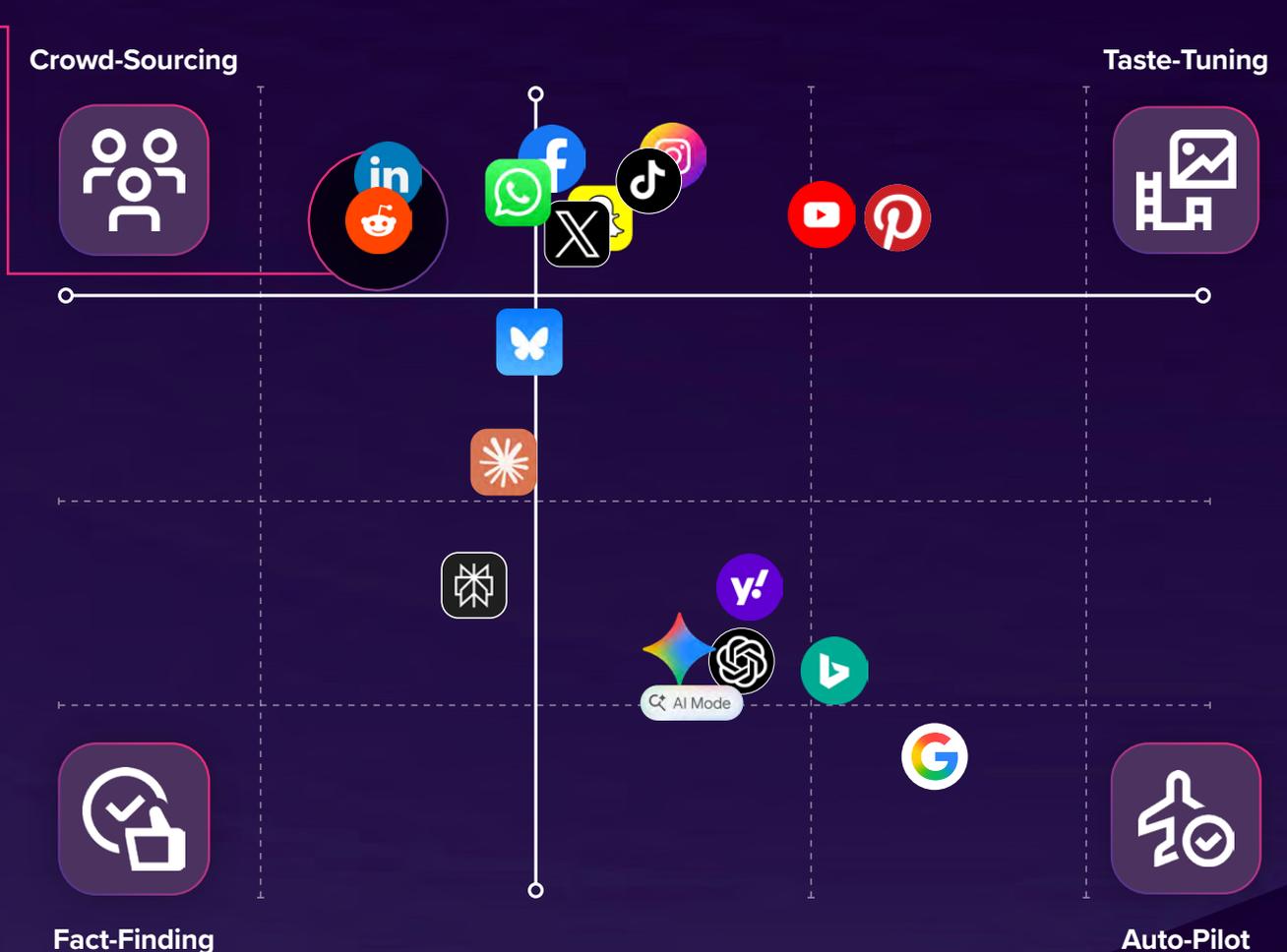# There is an increasing demand for user-generated information through community platforms like Reddit.

**Users are increasingly turning to Reddit for real, peer-to-peer information,** making it the fastest-growing social media platform in the UK since 2024 (Ofcom Online Nation 2025)[1].

At the same time, Reddit remains a contentious space for brands. Its community-first culture means it must be approached carefully. Yet, with growing distrust of AI-generated content, Reddit is becoming an important platform for building trust and validating decisions.

It's also a major source of human data for AI training and one of the most cited sites in AI responses[2], making it high-impact, if handled right.

1. https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/online-nation/2025/online-nations-report-2025.pdf?v=409414

2. https://pressgazette.co.uk/news/reddit-claims-top-spot-as-most-cited-domain-in-ai-generated-answers/

Crowd-Sourcing

Taste-Tuning
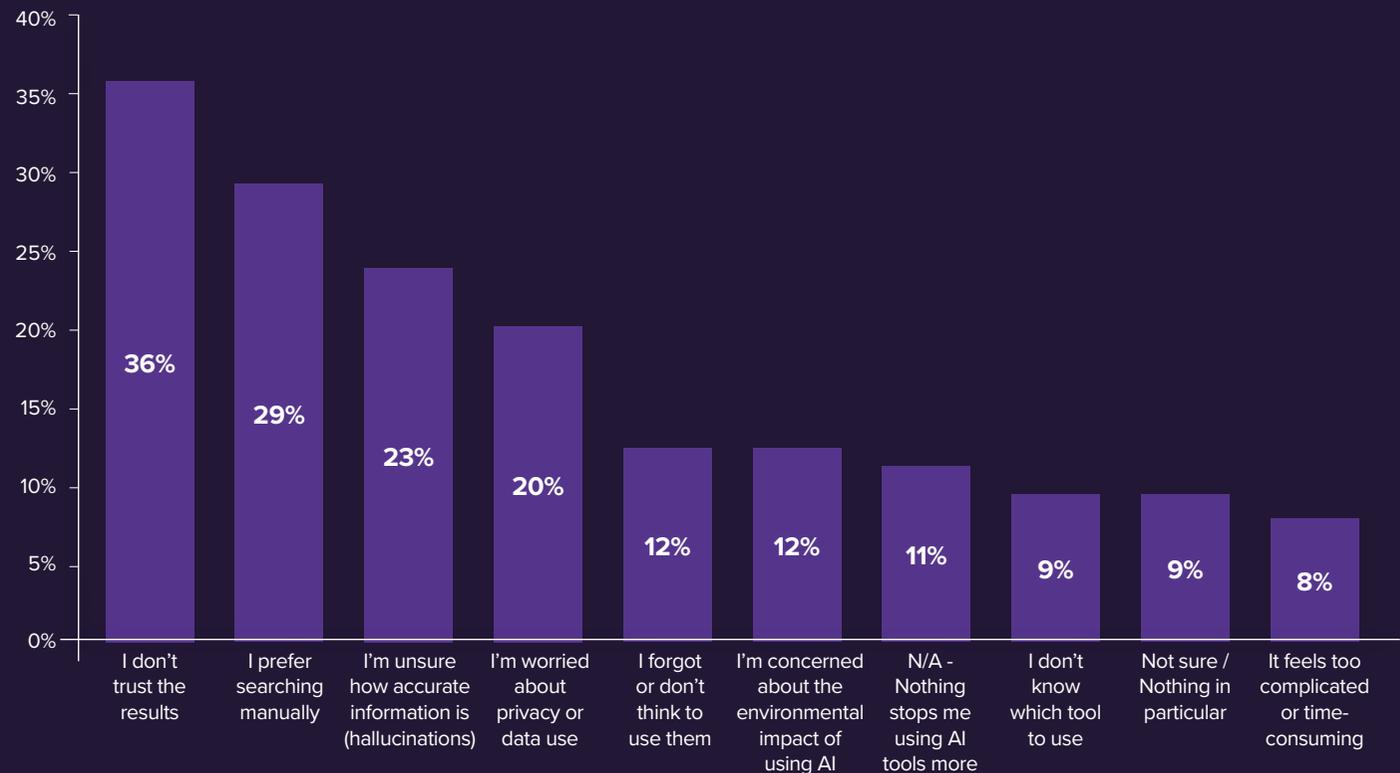
Fact-Finding

Auto-Pilot

AI Mode

# Despite more people using AI search platforms, trust remains a key barrier.

As we found in previous quarters, **trust** remains the top barrier to AI.

Despite the increasing preference for mainstream AI, there is still a preference for **manual search** for some.

People are also concerned about **accuracy (hallucinations)** and **data privacy.**

When rolling out AI content, it's important to be transparent about how AI has been used.

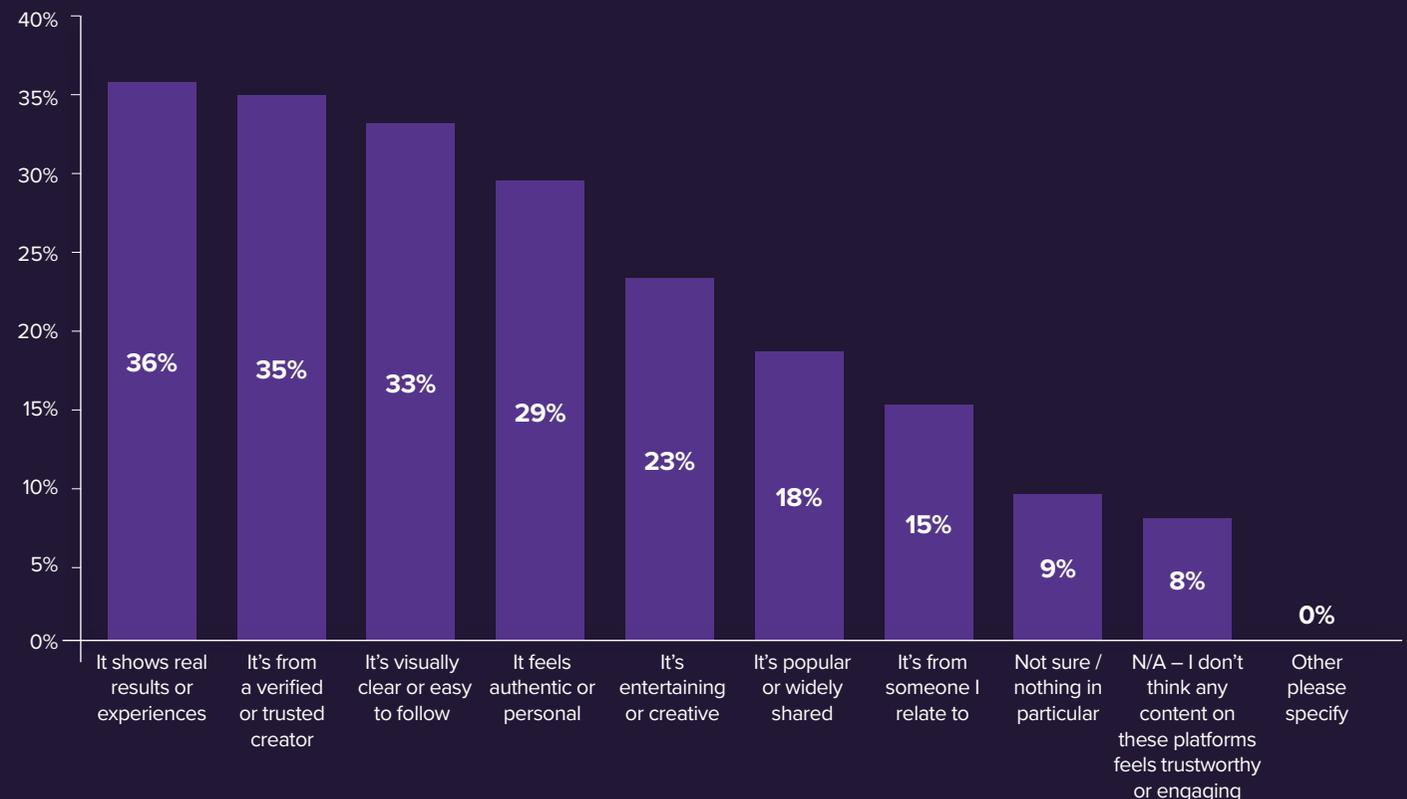| Category | Percentage |
|---|---|
| I don't trust the results | 36% |
| I prefer searching manually | 29% |
| I'm unsure how accurate information is (hallucinations) | 23% |
| I'm worried about privacy or data use | 20% |
| I forgot or don't think to use them | 12% |
| I'm concerned about the environmental impact of using AI | 12% |
| N/A - Nothing stops me using AI tools more | 11% |
| I don't know which tool to use | 9% |
| Not sure / Nothing in particular | 9% |
| It feels too complicated or time-consuming | 8% |

Q4. What, if anything, stops you from using AI tools for searching online or searching online more?
n=1322 | Reflect Digital SearchPulse Q4 2025

# To build trust, brands should lean into what works on multimedia led platforms.

Showing 'reality' is important to be considered trustworthy or engaging. Brands should focus on **authenticity** with multimedia platforms and avoid AI-generated content.

**Creator verification** is also important. Emphasise the credentials and trustworthiness of the people and brands behind the content.

Using **clear and easy to understand** visuals is also important. Taking advantage of design principles in visual formats can set content apart from text-based AI summaries.



Bar chart data:
- It shows real results or experiences: 36%
- It's from a verified or trusted creator: 35%
- It's visually clear or easy to follow: 33%
- It feels authentic or personal: 29%
- It's entertaining or creative: 23%
- It's popular or widely shared: 18%
- It's from someone I relate to: 15%
- Not sure / nothing in particular: 9%
- N/A – I don't think any content on these platforms feels trustworthy or engaging: 8%
- Other please specify: 0%

Q5. When using multimedia platforms (i.e. platforms that use a combination of text, audio, video) for information or ideas, what, lif anything, makes content on these platforms feel trustworthy or engaging?n=1292 | Reflect Digital SearchPulse Q4 2025

# Three ingredients for building trust in the age of AI distrust.

## 1

### Establish brand credibility through social proof and authority.

When using AI in content and digital experiences, use visual cues for trust such as brand logos and maintain a strong brand design or tone of voice to remain familiar to the audience, especially your customers.

## 2

### Be transparent about where AI is used, and where it might fall short.

Explain when AI is being used in content and digital experiences, what it can and can't do, and avoid over-claiming or over-promising what it can do for the audience.

Being transparent can empower the audience to make the decision whether to keep engaging or not.

## 3

### Combine AI with human expertise and support.

Make it easy for the audience to access real people:

For content and thought pieces, ensure that the reader can link the ideas to a real person, someone they can identify with and respect.

For chatbots, reassure customers that they can still reach out to real people who can listen to and empathise with them, through telephone numbers or prompts that can connect them to a live agent.

# Reflect reacts.

We've defined the ingredients for trust, now we must apply a reflective and critical lens of how we use AI in our workflows too. Now that digital environments are quickly becoming saturated with AI content, trust is no longer just about being accurate, that is quickly and easily accessible now. Connection and affinity are just as important, we all seek out a human connection, it's how we function and still needs to be present within brands, as it helps us to verify our trust.

So, the next time you head towards an AI tool, ask yourself this...

## Does this sound/look like 'us'?

When using AI generative tools for your content, you pose the risk of falling into the sea of sameness, looking and sounding just like everybody else. The major risk here is that your unique brand becomes vague and simply quite generic. Would your audience recognise this content as yours if you were to place it on a competitor's site?

If the answer is no, be sure to stick to your own authentic tone of voice. Maintain a sense of authority that holds its own DNA - make it ownable.

**Tip:** Use AI as the drafter, not the director, when composing content.

## Does the use of this AI content reflect our values?

We've seen huge pushbacks when brands misjudge this, most notably the recent Christmas advert by Coca-Cola, which was completely made with AI. The brand had built up huge affinity, nostalgia, and personal sentiment with this ad over the years. Critics labelled it as 'soulless,' and 'ill-judged', proving that - while AI might be efficient and even innovative - its efficacy plummets if the audience feels cheated out of human connection with said brand.

**Tip:** Remember the efficacy as well as the efficiency. If the use of AI undermines the emotional connection, or integrity of your brand, the production savings might not be worth the brand damage.

**AI is a great tool and your brand existed before it, let's make sure your brand can still thrive in the future with AI too.**

**Nathan Denny**
Graphic Designer
& Creative Strategist

# You have the opportunity to plan the right messenger for different parts of your brand story.

## Brand

**Your voice**

What you stand for and want to be remembered for.

## User Generated Content

**Their voice**

What your audience is saying and sharing about you.

## Influencer

**Trusted voice**

People who add credibility and humanise your brand story.

## Media

**Amplified voice**

Platforms and publications that extend your reach and authority.

# Strategic insight.

Human credibility is the clear opposite to AI distrust.

The more people use AI to generate cookie cutter content that feels very impersonal, the more obvious it is that genuine, human led content will skyrocket in performance.

## 🔍 | What YOU can do...

Amplify User Generated Content and social proof by leaning into raw, authentic human voices, which could include your own employees.

Subject matter experts and real team members build far more trust than polished celebrity content.

**Your budget should go towards credibility and genuine expertise, not fame.**

# Key takeaways.

## 1

### Optimise for AI-driven answers

Use structured data and focus on E-E-A-T signals to ensure your content is authoritative and trusted by AI and search platforms.

## 2

### Define your messenger strategy

For every piece of content you plan you have a choice to decide how it reaches your audience. Think about the messenger as being as important as the platform itself.

## 3

### Allocate your budget wisely

Invest in credibility and genuine expertise, not just fame, to strengthen trust and drive action.

**As we pass the threshold this quarter, we also need to start thinking about trusting agents to research and buying for people.**

Check out Becky's article for Search Engine Land. **Your Next Customer Might not be Human.**

**Becky Simms**
CEO & Founder, Reflect Digital

**READ ARTICLE**

# What today's travellers need, and how they search for it.

The Travel and Tourism sector continues to feel the impact of shifting search behaviour, with travellers using more platforms, and more AI tools, across every stage of planning.

In this section, we explore how people move from inspiration to consideration, through to booking and finding deals, and what these patterns mean for brands trying to influence decisions along the way.

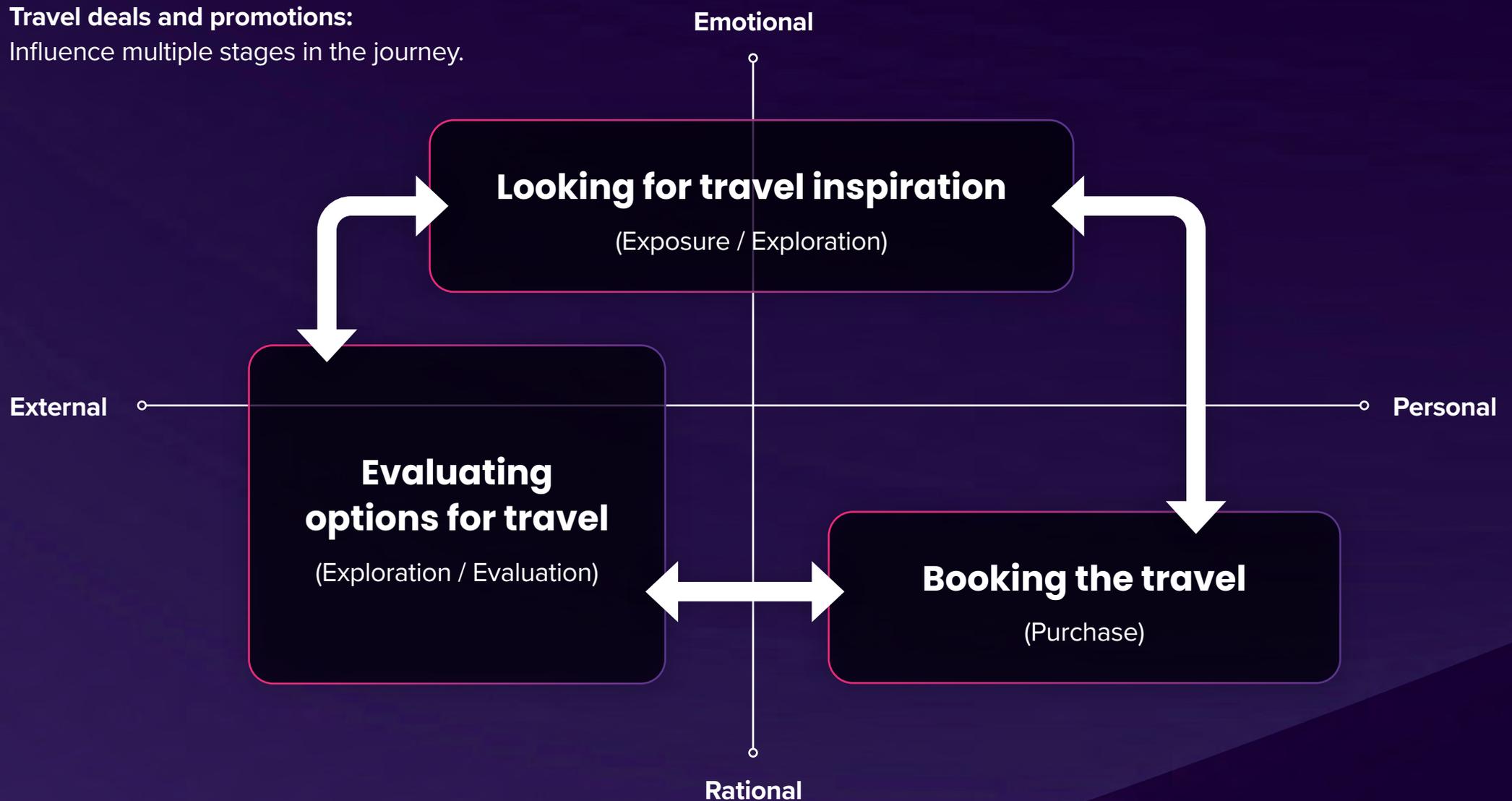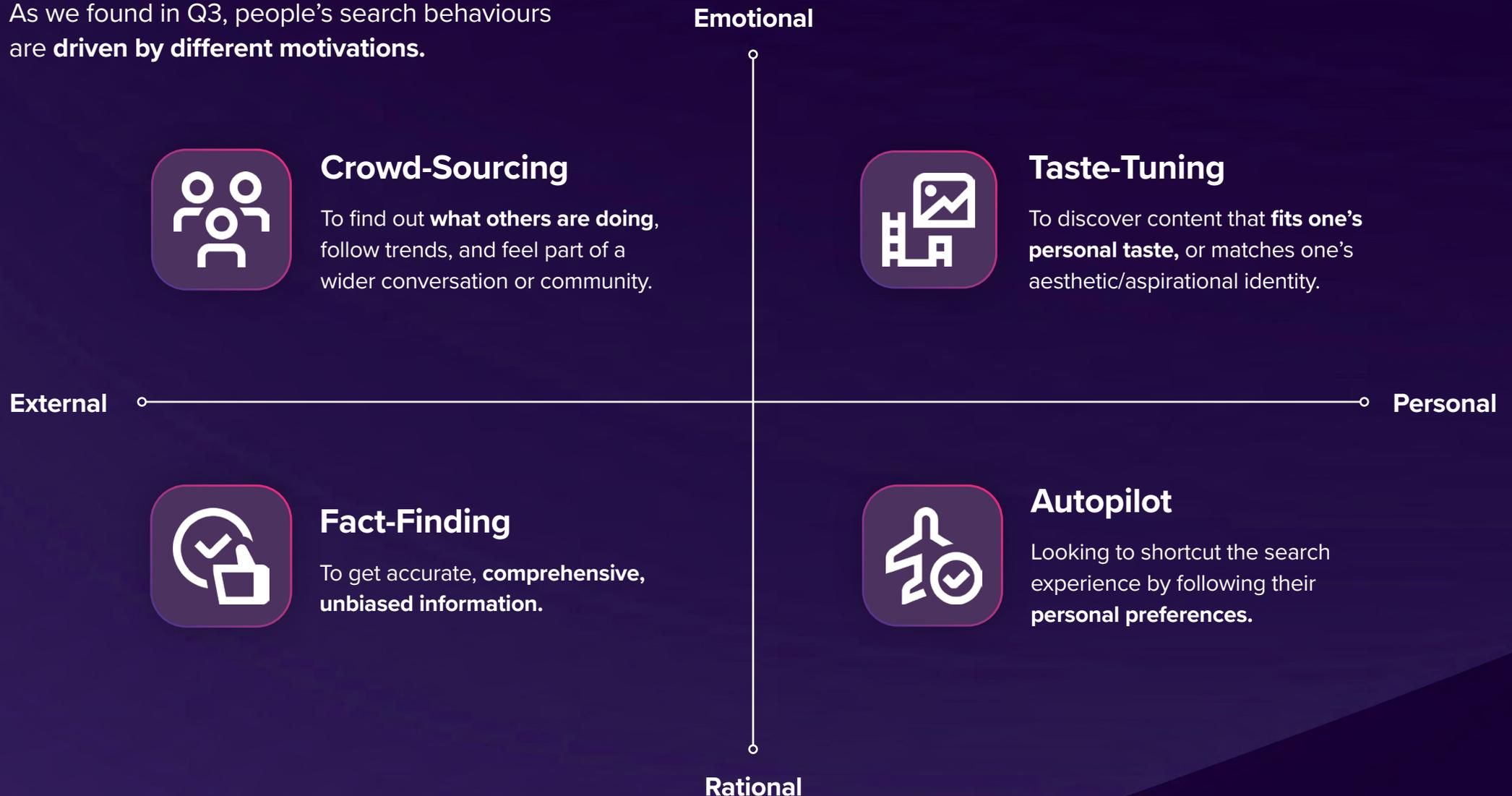**Step inside Becky's journey, from early consideration through to booking her holiday.**

WATCH NOW

# Travel is a multi-stage journey from inspiration to booking.

**Travel deals and promotions:**
Influence multiple stages in the journey.

Emotional

Looking for travel inspiration

(Exposure / Exploration)

External

Personal

Evaluating options for travel

(Exploration / Evaluation)

Booking the travel

(Purchase)

Rational

# Planning and research are changing along with people's search behaviours.

As we found in Q3, people's search behaviours are **driven by different motivations.**

**Emotional**

**External** — — **Personal**

**Rational**

### Crowd-Sourcing
To find out **what others are doing**, follow trends, and feel part of a wider conversation or community.

### Taste-Tuning
To discover content that **fits one's personal taste,** or matches one's aesthetic/aspirational identity.

### Fact-Finding
To get accurate, **comprehensive, unbiased information.**

### Autopilot
Looking to shortcut the search experience by following their **personal preferences.**

# The right content at the right time, can guide people on their journey.

Highlighting travel deals and promotions can **influence people's travel decisions.**

**Emotional**

**External**

**Personal**

**Rational**

**Crowd-Sourcing**

**Taste-Tuning**

**Fact-Finding**

**Autopilot**

**Using what is popular and visually appealing** to inspire people

(Exposure / Exploration)

**Providing information** to help people evaluate options for the holiday

(Exposure / Exploration)

**Making it easy and automatic** to book the holiday
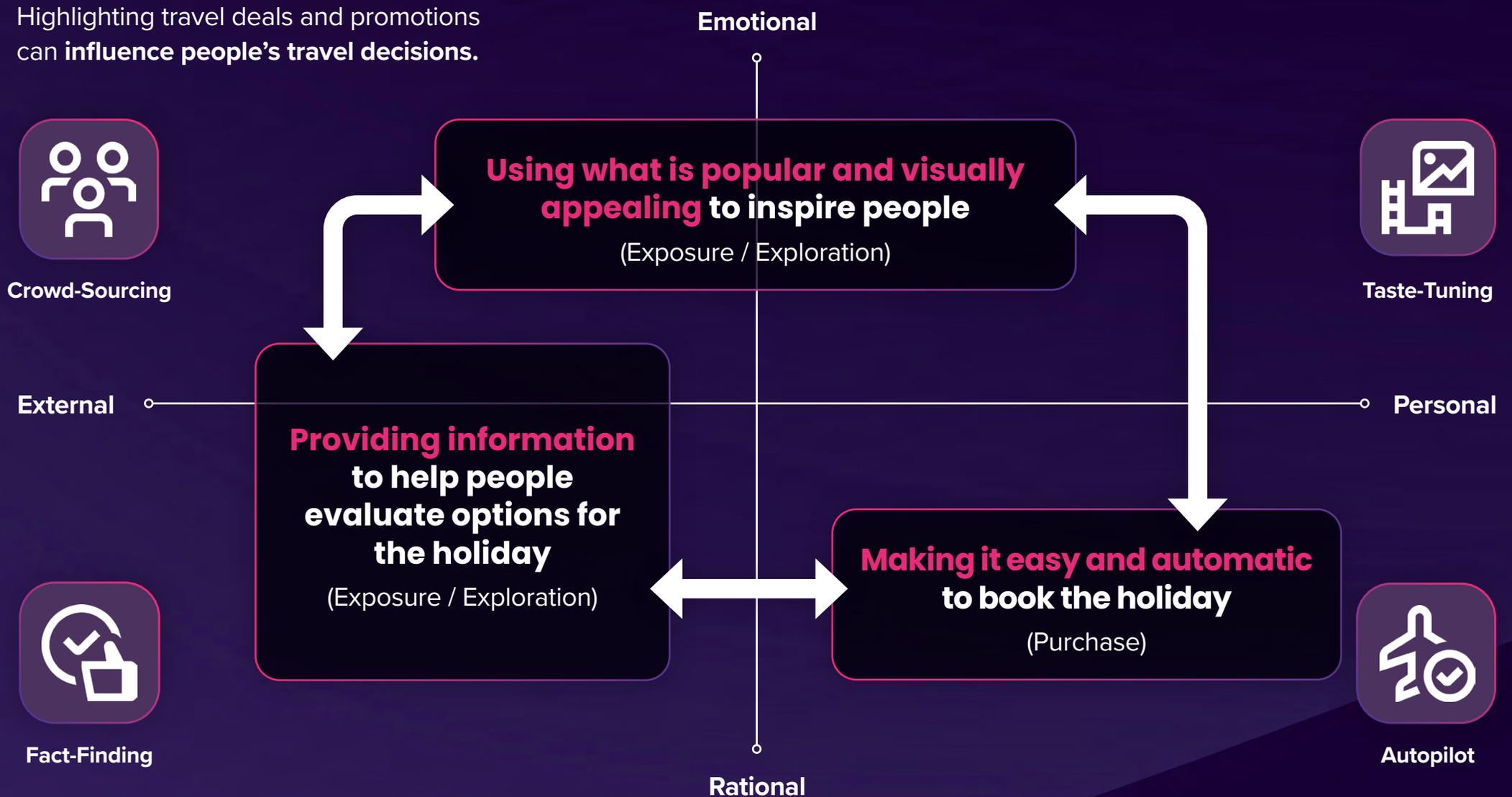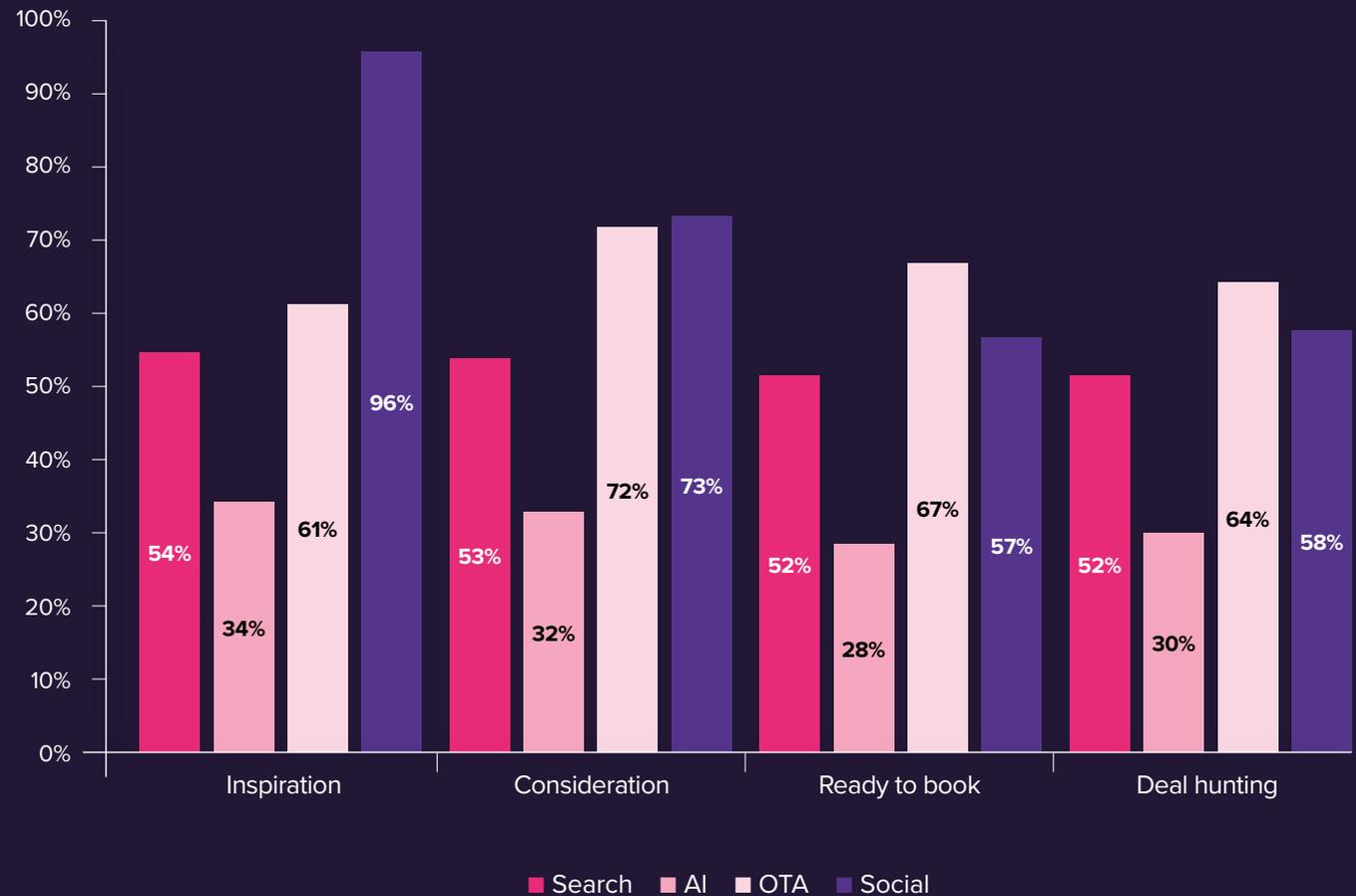
(Purchase)

# Search platform preference shifts, depending on where the traveller is in the purchase journey.

Here, we can see search is consistent across all four stages, while AI is creeping in as a significant cog in the decision-making process.

A staggering **96% of respondents report using at least one social media platform when looking for inspiration for a trip,** and it remains relevant across the journey.

It is important to be present on social media at both the top of the funnel and as a gateway to booking - but don't expect a high ROI on it alone, that's not its primary role.

Although higher at the consideration phase, Online travel agencies (OTAs) are the most popular choice when ready to book or hunting for deals, making them key for the lower-funnel, ready-to-book stage and a great place for advertising deals!



| | Inspiration | Consideration | Ready to book | Deal hunting |
|---|---|---|---|---|
| Search | 54% | 53% | 52% | 52% |
| AI | 34% | 32% | 28% | 30% |
| OTA | 61% | 72% | 67% | 64% |
| Social | 96% | 73% | 57% | 58% |

■ Search ■ AI ■ OTA ■ Social

When planning your next holiday, trip, activity, or experience (from initial inspiration through to booking), which of the following do you use to search online? n=1939

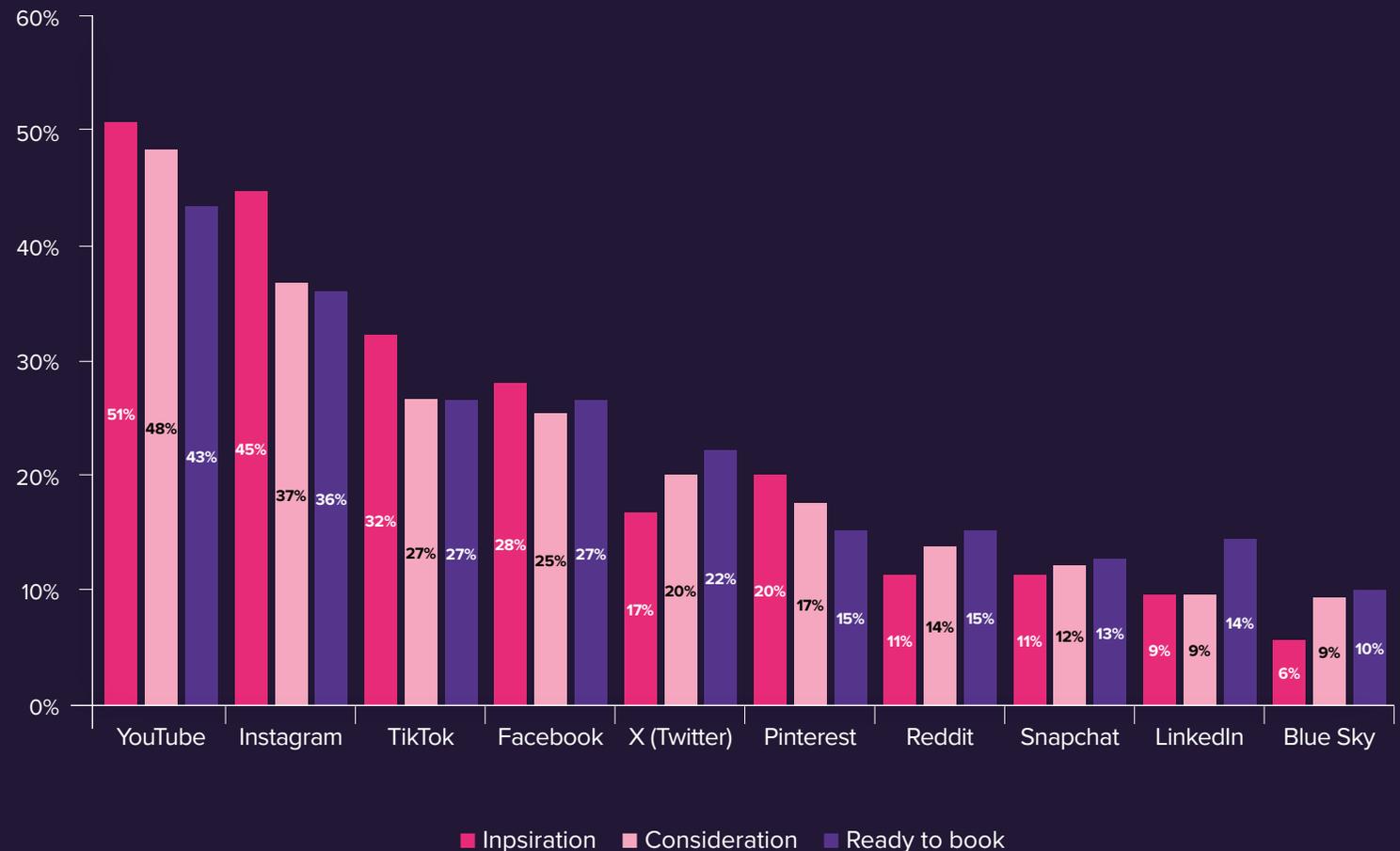# Multimedia social platforms are primarily used for inspiration.

Social media isn't a single channel, and content shouldn't be treated as if it is either.

**Audio/visual platforms** like YouTube, Instagram and TikTok are more likely to be inspiration-focussed.

Similarly, the **credibility of the source/messengers** on platforms like X, Reddit and LinkedIn influences whether a platform is more suitable for consideration and booking.

Focus on content that **inspires for multimedia (audio-visual) platforms.** Provide **cues for trust** and **comprehensive information** to help with consideration and booking.



Bar chart legend: ■ Inpsiration  ■ Consideration  ■ Ready to book

| Platform | Inspiration | Consideration | Ready to book |
|---|---|---|---|
| YouTube | 51% | 48% | 43% |
| Instagram | 45% | 37% | 36% |
| TikTok | 32% | 27% | 27% |
| Facebook | 28% | 25% | 27% |
| X (Twitter) | 17% | 20% | 22% |
| Pinterest | 20% | 17% | 15% |
| Reddit | 11% | 14% | 15% |
| Snapchat | 11% | 12% | 13% |
| LinkedIn | 9% | 9% | 14% |
| Blue Sky | 6% | 9% | 10% |

Which online sources do you use across the full travel planning journey (including inspiration, comparing options, finding deals, and booking)? n=1939

# Reflect reacts.

The role of X and Reddit plays out much later in the travel search journey. Rather than driving inspiration, they're used when people are closer to making a decision, even at the point of booking.

As peer-to-peer platforms, users arrive with specific questions, seeking reassurance and real-world experiences. With fewer polished influencers and more candid voices, these platforms feel more credible than visual-first channels.

**For travel brands, this matters: if you only focus on inspiration-led platforms, you risk missing the moment when trust is built and bookings are decided.**

**Charlotte van Rhee**
Head of Paid Media

# Strategic insight.

The data indicates that we need to stop thinking about social media purely as an awareness tool. This insight shows us that **social has a dominant influence across every stage** of the buyer journey, from start to finish.

### 🔍 | What YOU can do...

**Inspire with video:** YouTube and Instagram dominate the inspiration stage, if your brand lacks a presence here, you likely aren't even in the customer consideration set.

**Close with validation:** Usage of X, LinkedIn and Reddit actually increases as users get ready to book. It seems that buyers switch to these platforms to validate their choices BEFORE they buy.

The constant here is that Facebook remains steady across all stages, holding user attention equally from start to finish.

The takeaway is that you shouldn't treat social as a blanket channel, and you should tailor your content for each stage of the buying journey. **Capture hearts on video platforms, and capture wallets on text-based ones.**

# Reflect reacts.

**Planning for a holiday or trip isn't linear. You get inspired, investigate, close and reopen the decision repeatedly as you research, speak to family and friends, and as new content hits your feeds.**

So if the planning process isn't linear, our digital strategies shouldn't be either. As the data shows: it's not as simple as one channel = one funnel stage.

Social shows up across the entire journey, yet its role in driving early inspiration is often overlooked, eclipsed by how influential creators have become in the consideration and booking stage.

Creator credibility is just as valuable and important here as it is at any other stage - however dazzling a location has been made to look, we still need to hear that someone we trust has had a positive experience before we allow ourselves to even consider it. So UGC, authentic video reviews from local creators and travel influencers, and voiceovers will all do well here.

Gone are the days where we judge the success of upper-funnel activity on reach - here the goal is to be useful and memorable for an audience we've taken time to understand, and as such we should optimise for discovery signals that affirm this like watch time, saves and shares.
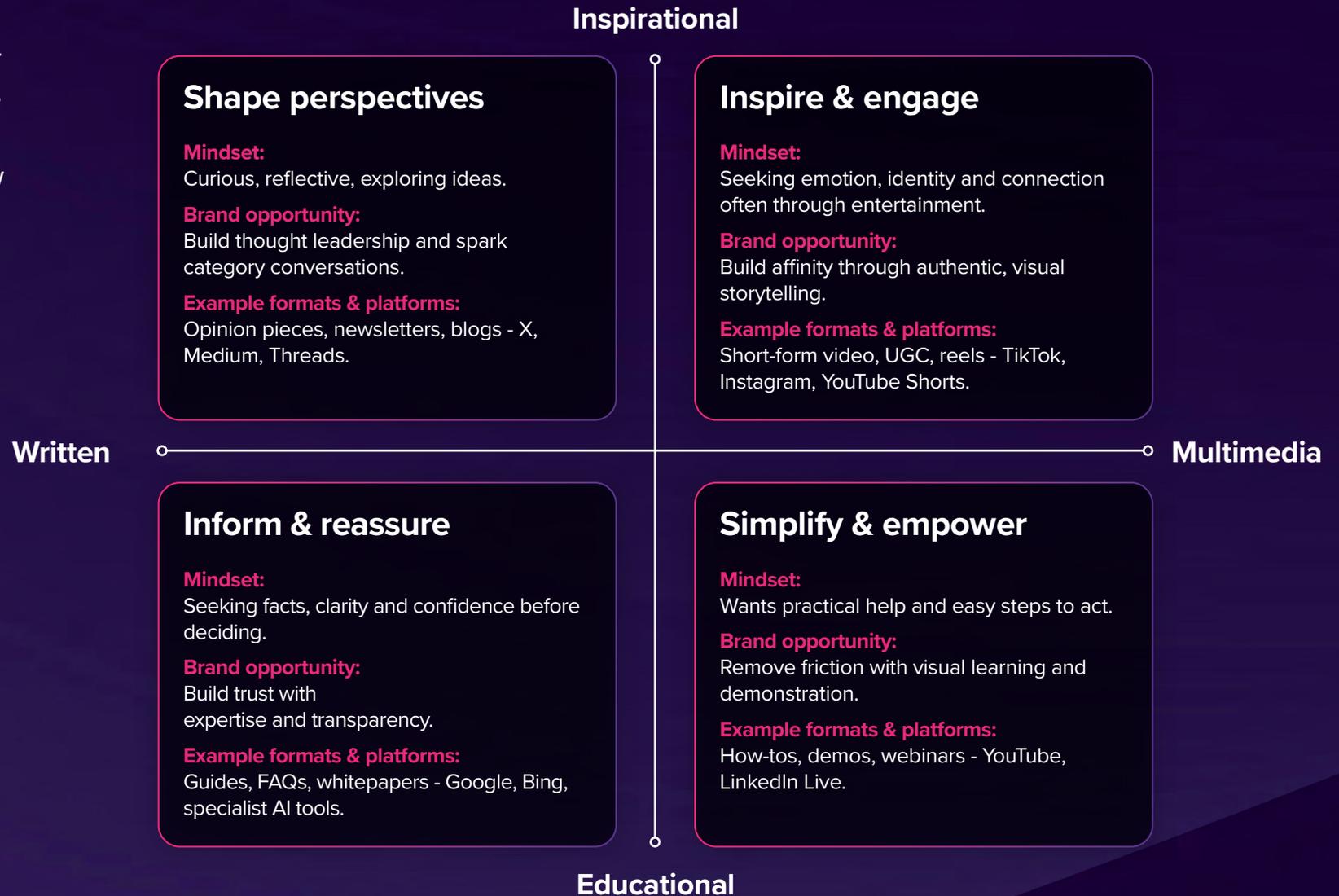
**Charlotte van Rhee**
Head of Paid Media

# Building content for intent-led Search.

To ensure you are appealing to your customer with the right content at the right time, we have created the content quadrant below which is there to guide your content creation.

**We've detailed the user mindset, your brand opportunity and examples of content formats and platforms.**

**Inspirational**

**Written** — **Multimedia**

**Educational**

## Shape perspectives

**Mindset:**
Curious, reflective, exploring ideas.

**Brand opportunity:**
Build thought leadership and spark category conversations.

**Example formats & platforms:**
Opinion pieces, newsletters, blogs - X, Medium, Threads.

## Inspire & engage

**Mindset:**
Seeking emotion, identity and connection often through entertainment.

**Brand opportunity:**
Build affinity through authentic, visual storytelling.

**Example formats & platforms:**
Short-form video, UGC, reels - TikTok, Instagram, YouTube Shorts.

## Inform & reassure

**Mindset:**
Seeking facts, clarity and confidence before deciding.

**Brand opportunity:**
Build trust with expertise and transparency.

**Example formats & platforms:**
Guides, FAQs, whitepapers - Google, Bing, specialist AI tools.

## Simplify & empower

**Mindset:**
Wants practical help and easy steps to act.

**Brand opportunity:**
Remove friction with visual learning and demonstration.

**Example formats & platforms:**
How-tos, demos, webinars - YouTube, LinkedIn Live.

"

**Every generation has their own search preferences for travel.**

**Understanding how your target demographic uses search platforms is the first step to building their trust for your brand.**

# A 'TikTok-first search' is the new normal for the youngest segment.

For age 18 to 24, TikTok comes first for every stage of the purchase journey and Google Search does not index highly for any.

Notably, this age group indexes highly on fewer search platforms (~2-3) at each stage compared to the 25 to 44 age groups (~4-5).

**Inspirational**

**Shape perspectives**

**Inspire & engage**

- Focus on multimedia rather than written content to inspire and shape perspective – make **TikTok** the core of your strategy for this age segment and use multimedia content to inspire.

- Use **Instagram** and **YouTube** as secondary channels for multimedia content that can inspire.

**Written** ———————————————— **Multimedia**

**Inform & reassure**

- Ensure you are present in **LLMs**, particularly **ChatGPT**, through publishing content that is readable by LLMs.

**Simplify & empower**

- Use short-form videos to educate - e.g. day-in-the life travel videos, honest reviews with visual and relatable experiential examples.

- Integrate **TikTok shops or links** to your website for conversion.

**Educational**

# Multimedia and OTA platforms dominate for the 25 to 44 age segments.

**Inspirational**

**Shape perspectives**

- Ensure **high-quality listings and positive reviews** on travel sites like Booking, including images and FAQs that can aid in research.

**Inspire & engage**

- Invest in a **broader search mix for these age segments,** focussing on multimedia platforms, specifically Instagram for the 25 to 34 and YouTube for the 35 to 44. TikTok remains relevant for discovery for the 25 to 34 segment.

**Written** ——————————————————— **Multimedia**

**Inform & reassure**

- Follow best practices to maintain good SEO hygiene and LLM rankings.

**Simplify & empower**

- Consider the use of AI shopping agents – this age segment indexes the highest for ChatGPT in the booking stage.

**Educational**

# The 18 to 44 age segment are more likely to use ChatGPT for comparing options and booking, but NOT for inspiration.

**ChatGPT** only indexes highly for the 18 to 44 age segments and notably in the **Consideration, Booking and Deals** phases of the travel purchase journey.

**Notably, it doesn't index highly in the inspiration stage.** For inspiration, people value authentic and user-generated content.

| | Inspiration | Consideration | Booking | Deals |
|---|---|---|---|---|
| **18 to 24** | 1 Tiktok<br>2 Instagram<br>3 YouTube | 1 TikTok<br>2 ChatGPT | 1 TikTok<br>2 ChatGPT<br>3 Booking.com | 1 TikTok<br>2 Instagram |
| **25 to 34** | 1 TikTok<br>2 Instagram<br>3 YouTube<br>4 Booking.com | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Google Search | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Tripadvisor<br>5 Google Search | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Google Search |
| **35 to 44** | 1 Instagram<br>2 YouTube<br>3 Booking.com<br>4 Tripadvisor<br>5 Google Search | 1 YouTube<br>2 ChatGPT<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search | 1 YouTube<br>2 ChatGPT<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search | 1 ChatGPT<br>2 YouTube<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search |

Channels ranked 1-5 based on use popularity per demographic

Q6. Q7. Q8. Q9. When planning a holiday, trip, or experience, which online sources do you use for inspiration, research, booking, and finding deals? n=1939

# The 18 to 44 age segment tend to be more exploratory about the social media platforms they use for inspiration, but not for consideration and booking.

Unsurprisingly, the 18 to 44 age segment is using social media as a form of **inspiration ahead of booking at a much higher rate** than those in the 45+ segments.

Whilst the 18 to 24 age segment is using **TikTok** across inspiration, consideration and booking, the 25 to 34 age segment is only using the platform for **inspiration purposes.**

The same sentiment is true for how the 35 to 44 segment uses **Instagram.**

|  | Inspiration | Consideration | Booking | Deals |
|---|---|---|---|---|
| **18 to 24** | 1 Tiktok<br>2 Instagram<br>3 YouTube | 1 TikTok<br>2 ChatGPT | 1 TikTok<br>2 ChatGPT<br>3 Booking.com | 1 TikTok<br>2 Instagram |
| **25 to 34** | 1 TikTok<br>2 Instagram<br>3 YouTube<br>4 Booking.com | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Google Search | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Tripadvisor<br>5 Google Search | 1 Instagram<br>2 ChatGPT<br>3 Booking.com<br>4 Google Search |
| **35 to 44** | 1 Instagram<br>2 YouTube<br>3 Booking.com<br>4 Tripadvisor<br>5 Google Search | 1 YouTube<br>2 ChatGPT<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search | 1 YouTube<br>2 ChatGPT<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search | 1 ChatGPT<br>2 YouTube<br>3 Tripadvisor<br>4 Booking.com<br>5 Google Search |

Q6. Q7. Q8. Q9. When planning a holiday, trip, or experience, which online sources do you use for inspiration, research, booking, and finding deals? n=1939

# Whilst Google Search maintains its relevance for most, only the 45 to 54 remain loyal.

Only the 45 to 54 age segment **has a strong preference for Google,** indexing the highest for each stage.

For the 55 to 64 age segment, Google indexes highly at the inspiration and consideration stages (i.e. researching) but not for booking.

**Inspirational**

**Shape perspectives**

**Inspire & engage**

- Since this is the only segment that indexes the highest for **Google Search** across the whole journey, it should be the core of your strategy.

- Invest in paid Google ads across the funnel and optimise around intent queries.

- Platforms such as YouTube and TripAdvisor remain relevant as secondary channels for inspiration – ensure there is multimedia content and positive user reviews.

**Written**

**Multimedia**

**Inform & reassure**

**Simplify & empower**

**Educational**

# Older segments (55+) are less reliant on digital search, relying more on traditional methods.

In contrast to younger digital natives who may either have been born with, or have been exposed to digital technology out of necessity, the 55+ segment is less likely to use digital search for travel research and purchase.

They shouldn't be left behind. Older segments may still rely more on traditional methods like travel agents, word of mouth from friends/ family or physical media. Therefore, it's integral to consider the role of these if your audience falls into this segment.

**Inspirational**

**Shape perspectives**

**Written**

**Inform & reassure**

**Inspire & engage**

**Multimedia**

**Simplify & empower**

**Educational**

- Older segments are less likely to use online search channels, but their traditional search habits can be influenced by digital assets:

- Encouraging **WOM for family members** through marketing emails that could be easily forwarded.

- Following accessibility best practices to support less digital savvy website visitors.

- Emphasise **phone numbers as CTAs** for enquiries and booking.

# LAB reacts.

Accessible and user friendly websites are important for everyone, but especially older segments due to the likelihood of having a disability being higher, especially after 65 years old[1]. Ensuring that everyone can access information and help when they need it is critical to offering a good user experience for your audiences.

2.2 billion people have a visual impairment[2] and a large portion of that number are over 55. Digital experiences can offer good colour contrast to help elements and content still be visible for those with low vision. Pay attention to how the different colours in your designs interact with each other and if it makes text and images easier or harder to see.

Use terminology that match what people would expect and give clear indication of what it is referring to. Wording can be very confusing if it aligns more with internal terminology than the wording people would use in real life. Clear navigation labels will help people know where to look on your website and give them a good sense about what type of content they will find there.

Offering a good website that helps support your customer service experience can benefit those that don't want to do everything online. Giving them options to reach out to someone that they can actually talk to will help build confidence in the decision they are making. If your website offers a consistent, accessible, user friendly experience, then it will help build digital confidence over time for less digital savvy audiences, especially the over 55.

**Cynthia Sipes**
UX Researcher

*LAB is Reflect Digital's sister agency.
**www.lab.co.uk**

1. https://www.ucl.ac.uk/public-policy/sites/public_policy_redesign/files/forecast-trends-dementia.pdf
2. https://www.who.int/news-room/fact-sheets/detail/blindness-and-visual-impairment

# Strategic insight.

The "funnel" seems to have fractured along generational lines. We are witnessing a fundamental split in search behaviour.

For the under-25s, TikTok has become a self-contained ecosystem, serving as the search engine, validation tool, and booking channel all in one.

Meanwhile, for the 25–44 demographic, ChatGPT and booking platforms have cannibalised the "Consideration" and "Comparison" stages, pushing Google aside. Google Search dominance is now largely restricted to the 45+ demographic.

## 🔍 | What YOU can do...

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Meanwhile, for the 25–44 demographic, ChatGPT and booking platforms have cannibalised the "Consideration" and "Comparison" stages, pushing Google aside.

Google Search dominance is now largely restricted to the 45+ demographic.

**Under-25s**

**25 – 44**

**Over 45+**

# Travel key takeaways.

## Inspire with video:

Focus on **YouTube** and **Instagram** to capture attention during the inspiration stage. Brands without a presence here risk being excluded from the customer consideration set.

## Close with validation:

As users move closer to booking, shift your focus to platforms like **X (formerly Twitter)** and **LinkedIn** where buyers validate their choices with more information before purchasing.

## Tailor content by platform:

**Don't treat social media as a single channel.** Use video to capture hearts and text-based or review platforms to capture minds.

## Adapt by generation:

### 18–24s:
Create a self-contained experience within **TikTok** to guide them from inspiration to decision without leaving the app.

### 25–44s:
Inspire with video on **Instagram** and **YouTube**, but optimise your presence on **ChatGPT** and booking platforms to win the validation stage.

### 55+:
Focus on traditional channels like word-of-mouth and travel agents, as this segment largely opts out of digital search.

## Strategic implication:

**Map each platform to its role in the buying journey** and tailor content accordingly to maximise both inspiration and conversion.

# Our prediction for Q1 2026.

## From searching to transacting, we'll see the rise of delegated choice.

Let's be real: the disruption isn't coming; it's already here. Our Q4 data confirms we've smashed through the adoption threshold a full quarter early, **with 52% of users now utilising AI tools regularly.**

I predict that Q1 2026 will be the tipping point where this familiarity moves into action. That means shifting consumer behaviour from "help me find" to "buy it for me".

This creates a new battleground I'll call "Delegated Choice." The fight is no longer just for the SERP; it's for the "decision gate," where AI agents filter the noise and present a single, vetted option for human sign-off.

If you aren't the first result picked by the agent, you are effectively invisible.

## The biggest risk right now?

You might be blocking your next customer. Our research shows that outdated bot protection and friction-heavy checkouts are causing agents to abandon sites immediately.

To capture this revenue, brands must urgently move to becoming "agent-ready," optimising their infrastructure to welcome the non-human buyer.

**Azeem Ahmad**
Strategy Director

## 52%
**OF USERS NOW UTILISING AI TOOLS REGULARLY**
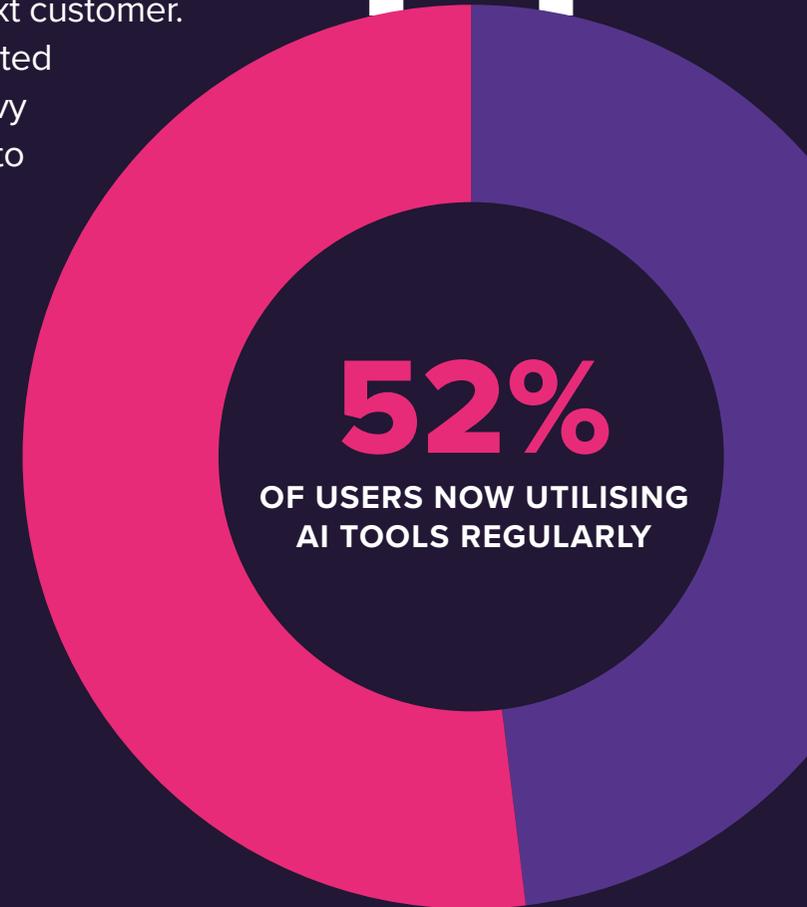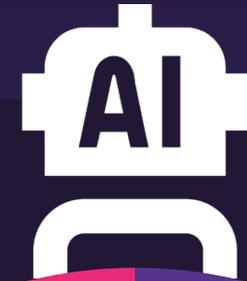
# What now? Don't let the competitors find your customers first.

searchpulse

**Azeem Ahmad**
Strategy Director

Search behaviour isn't shifting in one predictable way. It's fragmenting across platforms, formats, and moments of intent, and it does so differently for every industry and audience.

**Speak to our Strategy Director, Azeem, to see how we can create a SearchPulse report tailored directly to your audience's needs and secure your search advantage - before your competitors!**

BOOK A MEETING

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# Reflectdigital

# Reflect Digital is the digital marketing agency your customers will thank you for hiring.

Putting our clients' customers first, we work closely with ambitious global brands and eCommerce businesses who are looking to better understand their audience's motivations and evolving search behaviours.

Our strategies blend behavioural science, AI-powered insights, and marketing creativity to deliver next-generation search experiences. We believe in designing for emerging behaviours, not just today's best practices.

In short, we help businesses move beyond siloed channels to a place where the right message meets the right person at the right time, in a way that builds trust, nudges action, and drives growth.

Since we were founded in 2011, we've received many awards and recognitions, including **Agency of the Year 2024, Employer of the Year 2025, Campaign's Best Places to Work 2025,** and **Best Integrated Campaign 2024,** among others.

Demonstrating both our commitment to our team and delivering truly exceptional campaigns for our clients.

WINNER
**campaign**
BEST PLACES TO WORK 2025

UK COMPANY CULTURE AWARDS
2025 WINNER

UK Agency Awards 2025
**Winner**

UK SEARCH AWARDS
2024 WINNER

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