



SOCIAL MEDIA, AI CHATBOTS AND SOURCES OF INSPIRATION: HOW GUESTS DISCOVER DESTINATIONS TODAY

Presentation of selected findings from Destination Brand 25

Ellen Böhling | inspektour (international) GmbH

Hamburg, 30 April 2026

Destination Brand – inspektour



inspektour
TOURISM AND MARKET RESEARCH

WHAT CAN YOU EXPECT TODAY?

DESTINATION BRAND 25 at a glance

Presentation of selected findings: How guests discover destinations today

- Which **channels** are currently relevant?
- What **differences** can be seen **between source markets**?
- How do **social media-savvy target groups** differ from others?

Implications for destination marketing

Q&A

DESTINATION BRAND 25 at a glance:

The BrandValue+ and TravelIntent+ of tourist destinations

DESTINATION BRAND 25 – at a glance

**Basic module:
Brand Value+**

**Additional module:
TravelIntent+**



DESTINATION BRAND 25

Use and frequency of sources of inspiration

General sources of inspiration (all source markets)

1. Acquaintances / relatives / friends
2. Fairs / exhibitions
3. Travel guide / travel literature
4. TV (e.g., documentations, reports)
5. Magazines / newspapers / print media
6. Own catalogue / brochure of the country / the region / the city
7. Travel agency / tour operator
8. Online travel agent / booking portals
Search engines
9. Own website of the country / the region / the city
10. Virtual tours and 360-degree tours of sights and tourist destinations
11. Travel blogs

Social media networks (all source markets, except China)

1. Social media networks in general
2. Facebook
3. Instagram
4. YouTube
5. Pinterest
6. TikTok
7. X

2. WeChat
3. Weibo
4. Douyin
5. Youku Tudou
6. Renren



Artificial intelligence (AI)

chatbots (all source markets, except China)

1. Artificial intelligence (AI) chatbots in general
2. ChatGPT
3. Meta AI
4. Microsoft Copilot
5. Gemini
6. Perplexity AI
7. Claude
8. Le Chat

2. DeepSeek Chatbot
3. Ernie Bot
4. Yuanbao
5. Doubao
6. Kimi



DESTINATION BRAND 25 – at a glance

**Basic module:
Brand Value+**

**Additional module:
TravelIntent+**

**Representative of the
local population aged
between
14 to 74 years**

**Source market DE:
Target group analysis
according to BeST
holidaymaker types +
SINUS milieus**

10 source markets

**> 150
Tourist
destinations**

**Online survey
Field work: Oct. till Dec. 25**



How guests discover destinations today

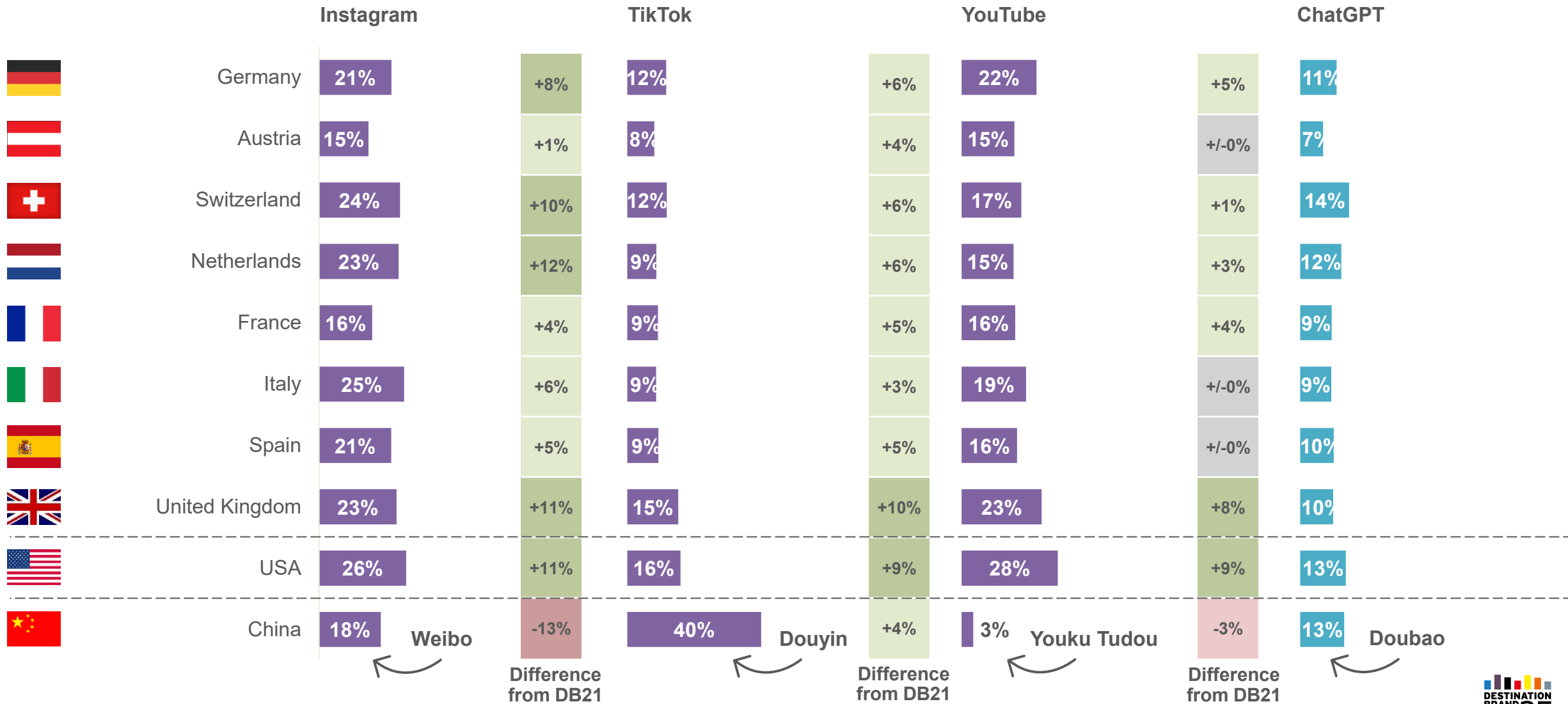
Source market comparison

Use of sources of inspiration in a comparison of source markets

Sources of inspiration	DE	AT	CH	NL	FR	IT	ES	UK	US	CN	
Acquaintances / relatives / friends	50%	49%	56%	57%	47%	44%	54%	44%	31%	33%	
Search engines	44%	41%	47%	36%	47%	47%	45%	48%	34%	31%	
TV	33%	31%	35%	28%	34%	33%	27%	36%	28%	43%	
Online travel agent / booking portals	28%	21%	21%	28%	16%	22%	20%	30%	16%	35%	
Travel guide / travel literature	26%	23%	26%	22%	27%	23%	23%	34%	27%	35%	
YouTube	22%	15%	17%	15%	16%	19%	16%	23%	28%	3%	Youku Tudou
Own website	21%	20%	22%	31%	22%	24%	23%	19%	15%	17%	
Instagram	21%	15%	24%	23%	16%	25%	21%	23%	26%	18%	Weibo
Travel agency / tour operator	20%	21%	19%	12%	15%	20%	19%	19%	13%	22%	
Own catalogue / brochure	19%	19%	17%	16%	12%	18%	14%	9%	10%	32%	
Social media networks in general	18%	14%	21%	14%	16%	11%	20%	21%	19%	25%	
Magazines / newspapers / print media	16%	18%	19%	15%	13%	17%	11%	16%	13%	21%	
Facebook	13%	11%	13%	12%	13%	19%	7%	18%	25%	2%	Renren
TikTok	12%	8%	12%	9%	9%	9%	9%	15%	16%	40%	Douyin
ChatGPT	11%	7%	14%	12%	9%	9%	10%	10%	13%	13%	Doubao
Fairs / exhibitions	8%	10%	7%	4%	6%	12%	10%	5%	12%	16%	
Pinterest	6%	4%	6%	5%	3%	3%	4%	5%	8%		
Travel blogs	6%	6%	7%	12%	9%	12%	11%	8%	8%	12%	
Gemini	4%	3%	3%	2%	3%	4%	3%	3%	8%		
AI chatbots in general	4%	2%	3%	3%	0%	2%	2%	4%	4%	6%	
Meta AI	2%	2%	1%	1%	1%	2%	1%	2%	8%		
X	2%	2%	2%	1%	1%	1%	2%	5%	6%		
Virtual tours and 360-degree tours	2%	3%	2%	1%	4%	4%	3%	3%	5%	10%	
Microsoft Copilot	2%	2%	2%	2%	1%	2%	2%	3%	4%	11%	DeepSeek Chatbot
Perplexity AI	1%	1%	1%	1%	1%	1%	1%	2%	3%		
Claude	1%	2%	1%	1%	1%	1%	1%	2%	3%	3%	Kimi
Le Chat	1%	2%	1%	0%	1%	1%	1%	1%	2%	5%	Ernie Bot

Source: inspektour (international) GmbH, 2025 Base: All respondents in Germany n = 3.000, all other source markets n = 1.000 each, in % of cases

Use of selected social media and AI sources of inspiration in a comparison of source markets – comparison with DB21



Source: inspektour (international) GmbH, 2021 / 2025 Base: All respondents in Germany DB25 n = 3.000 / DB21 n = 2.000, all other source markets DB25 / DB21 n = 1.000 each, in % of cases



How guests discover destinations today

DE, UK, FR, USA + CHN



Germany:
a hybrid inspiration profile



United Kingdom:
search-led & growing strongly in social



China:
driven by social & general sources of inspiration

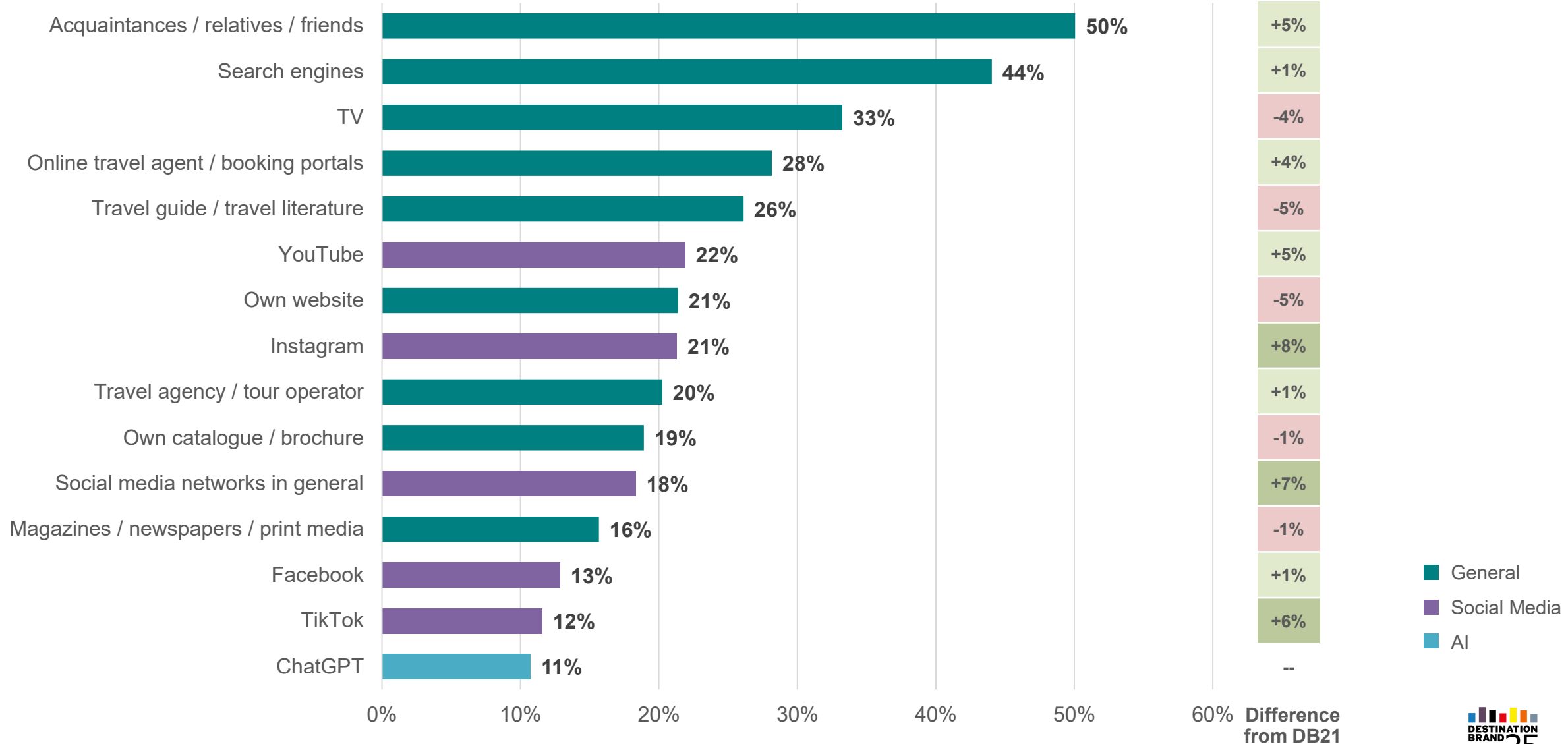


France:
more search-led & less social-driven



USA:
more platform- & video-oriented

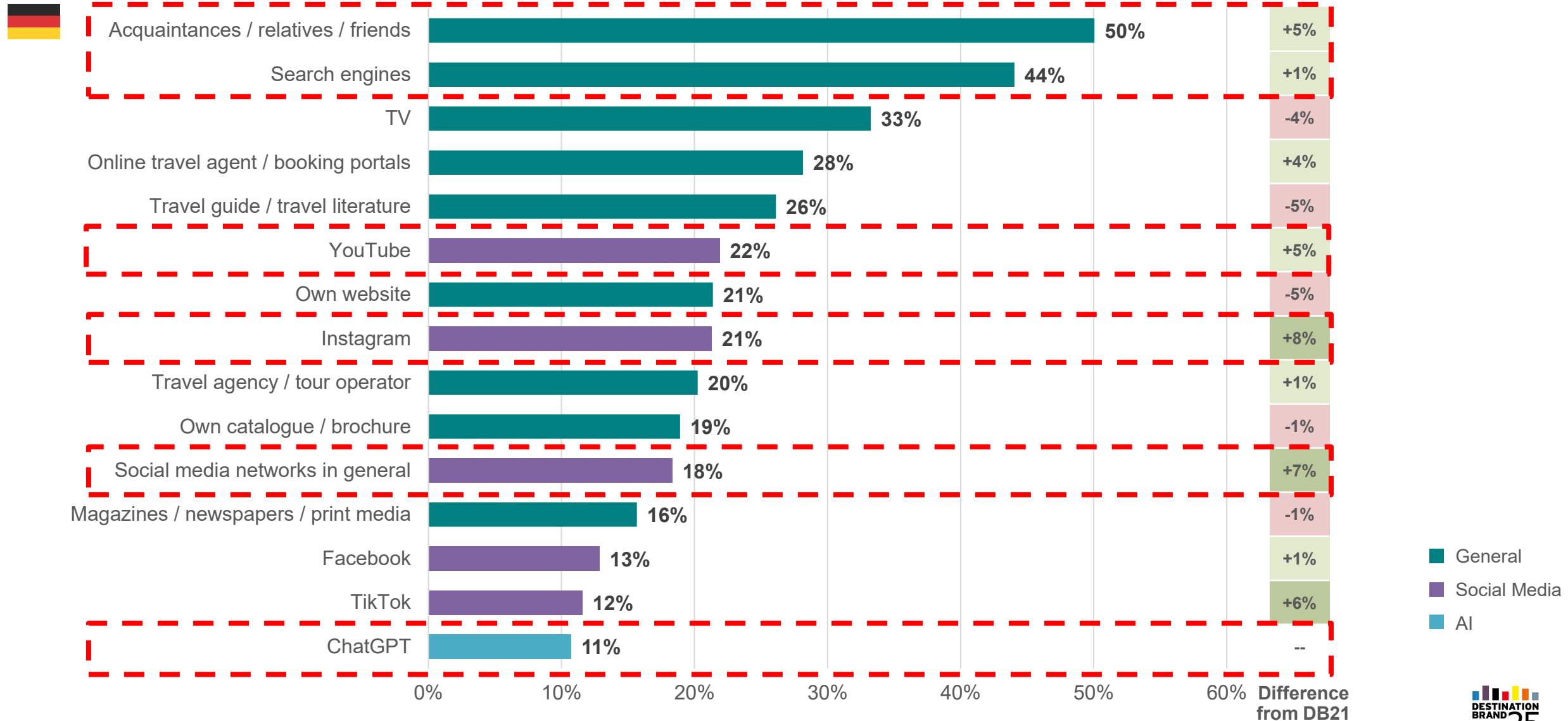
Top 15 sources of inspiration – Germany: a hybrid inspiration profile



Source: inspektour (international) GmbH, 2025 Base: All respondents in Germany n = 3.000, in % of cases

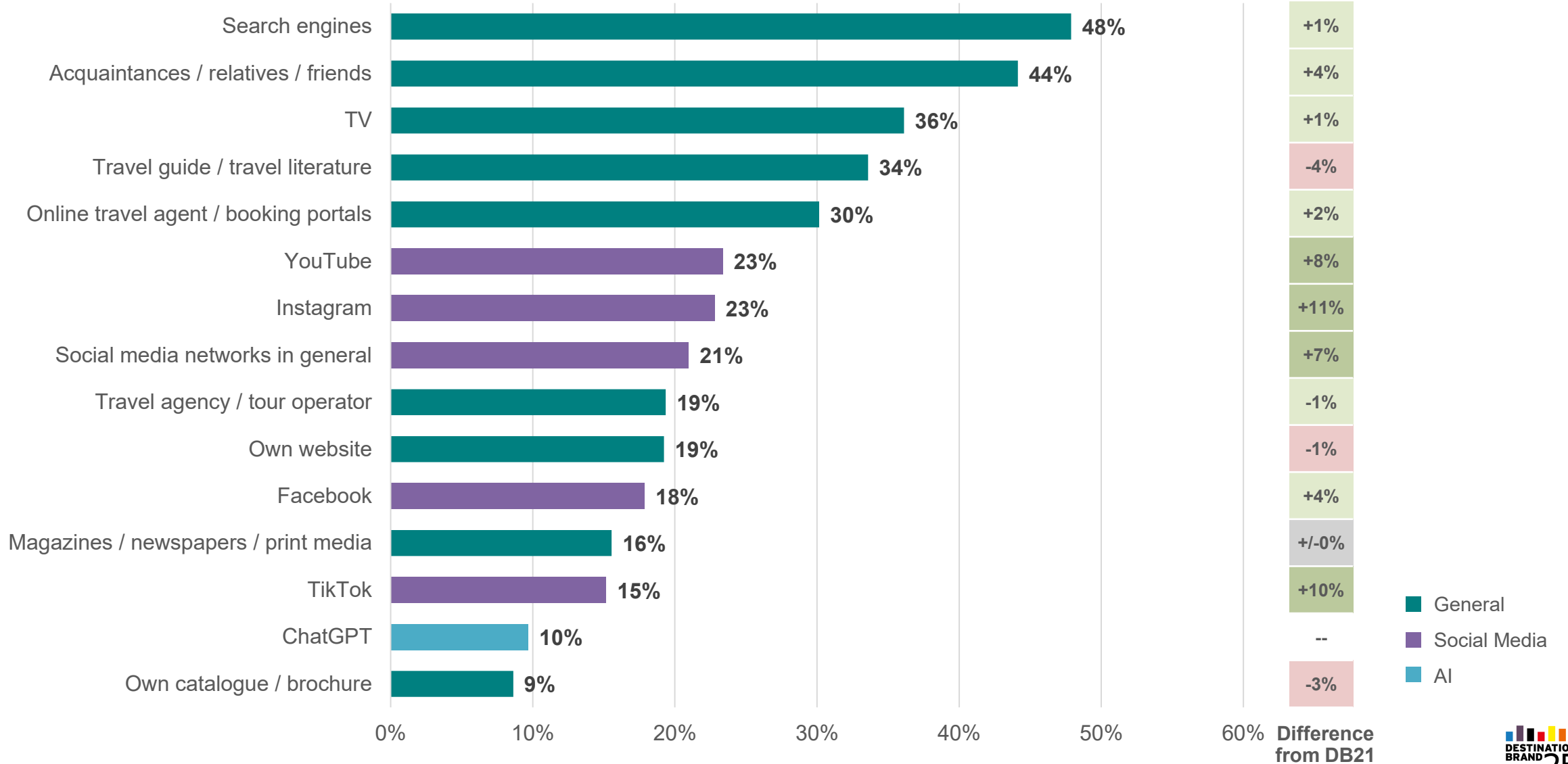


Top 15 sources of inspiration – Germany: a hybrid inspiration profile



Source: inspektour (international) GmbH, 2025 Base: All respondents in Germany n = 3.000, in % of cases

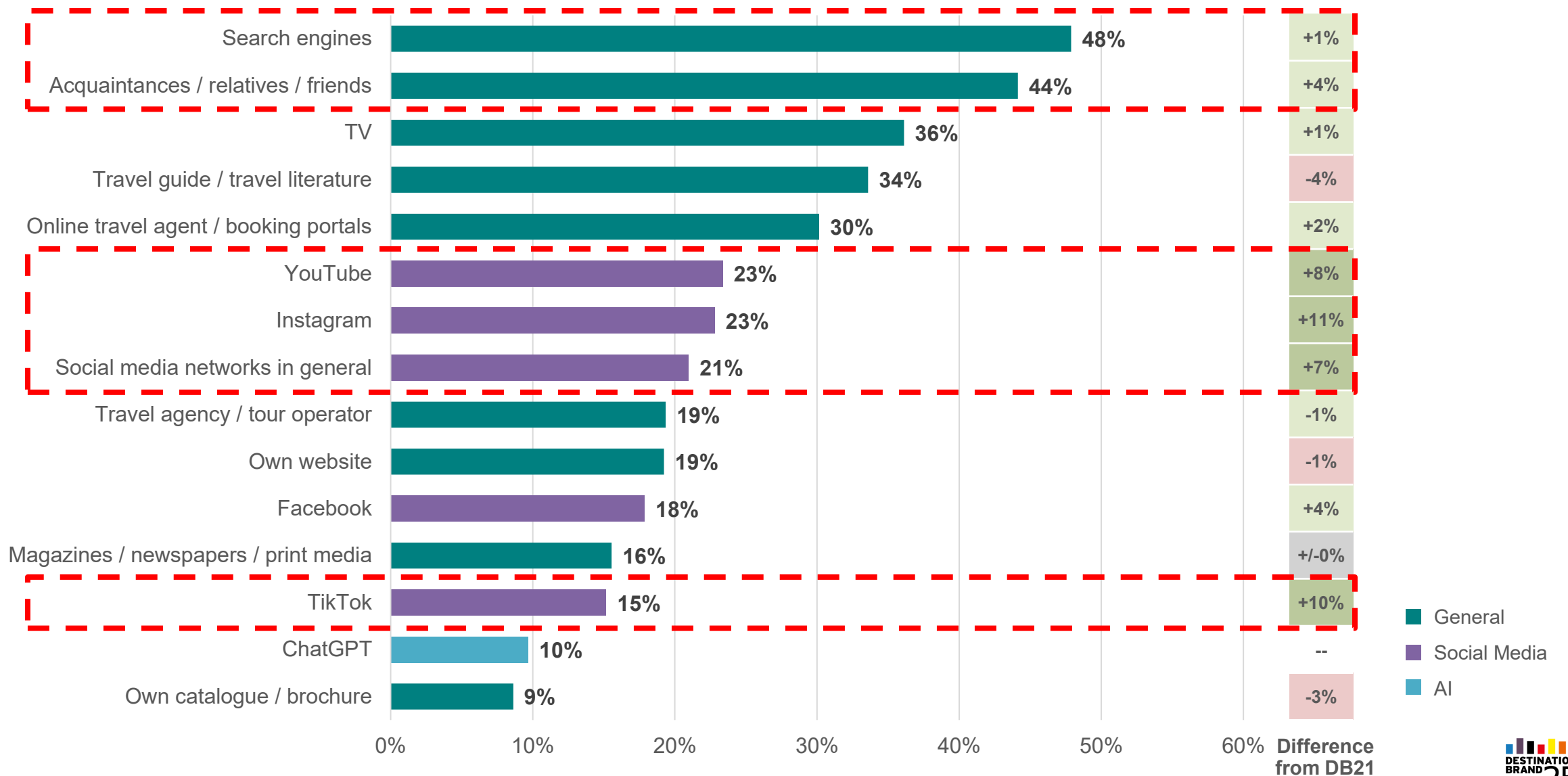
Top 15 sources of inspiration – UK: search-led and growing strongly in social



Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases



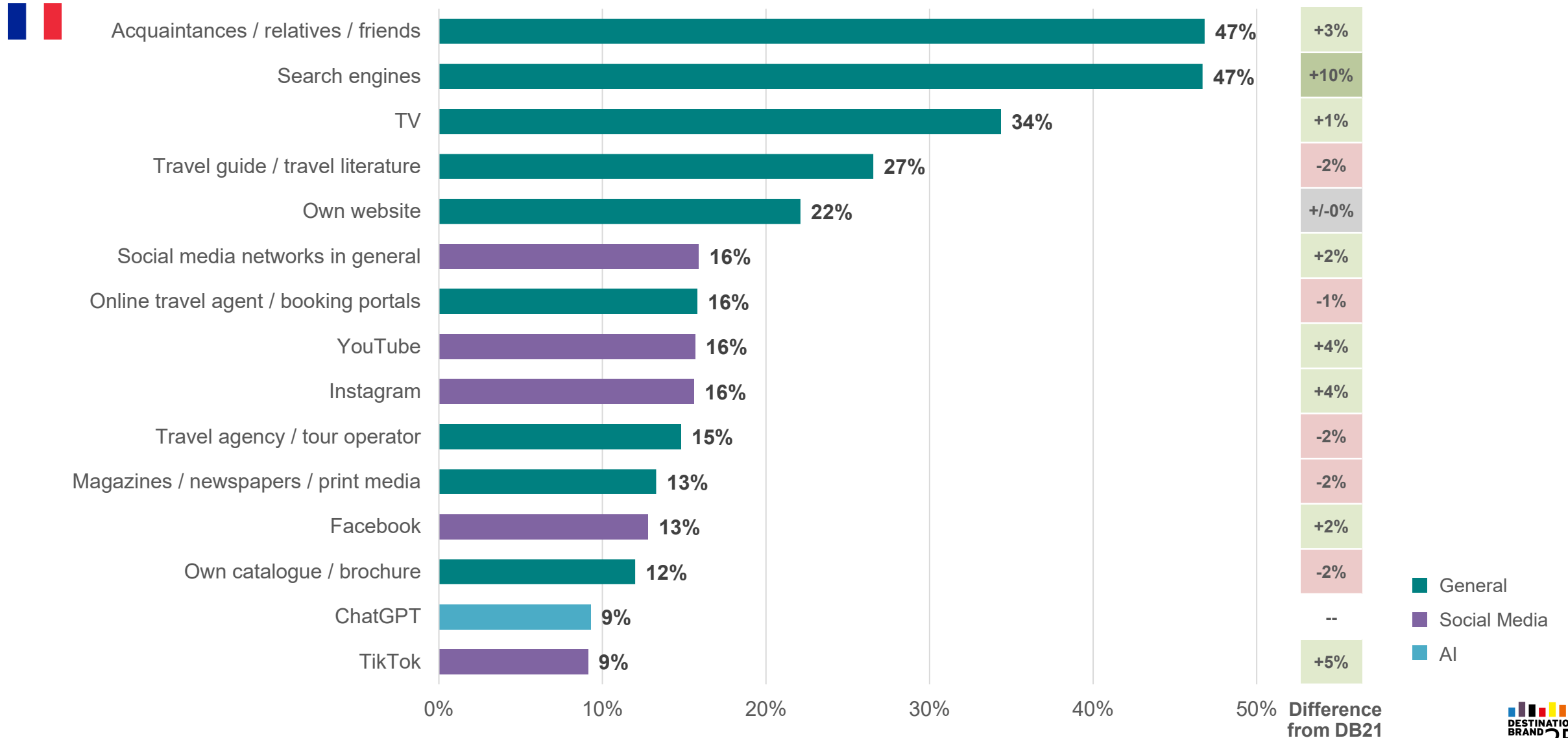
Top 15 sources of inspiration – UK: search-led and growing strongly in social



Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases

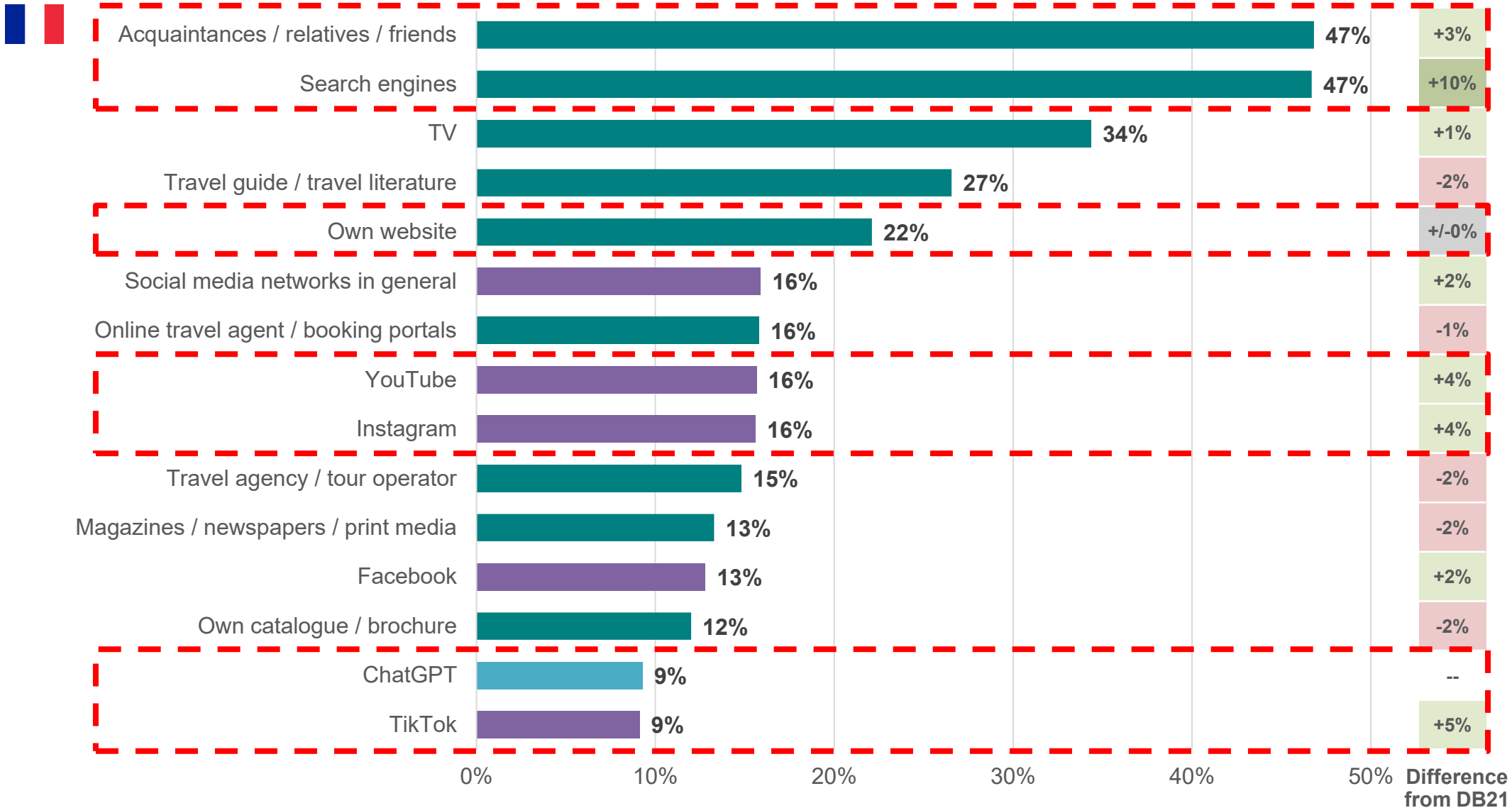


Top 15 sources of inspiration – France: more search-led and less social-driven



Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases

Top 15 sources of inspiration – France: more search-led and less social-driven

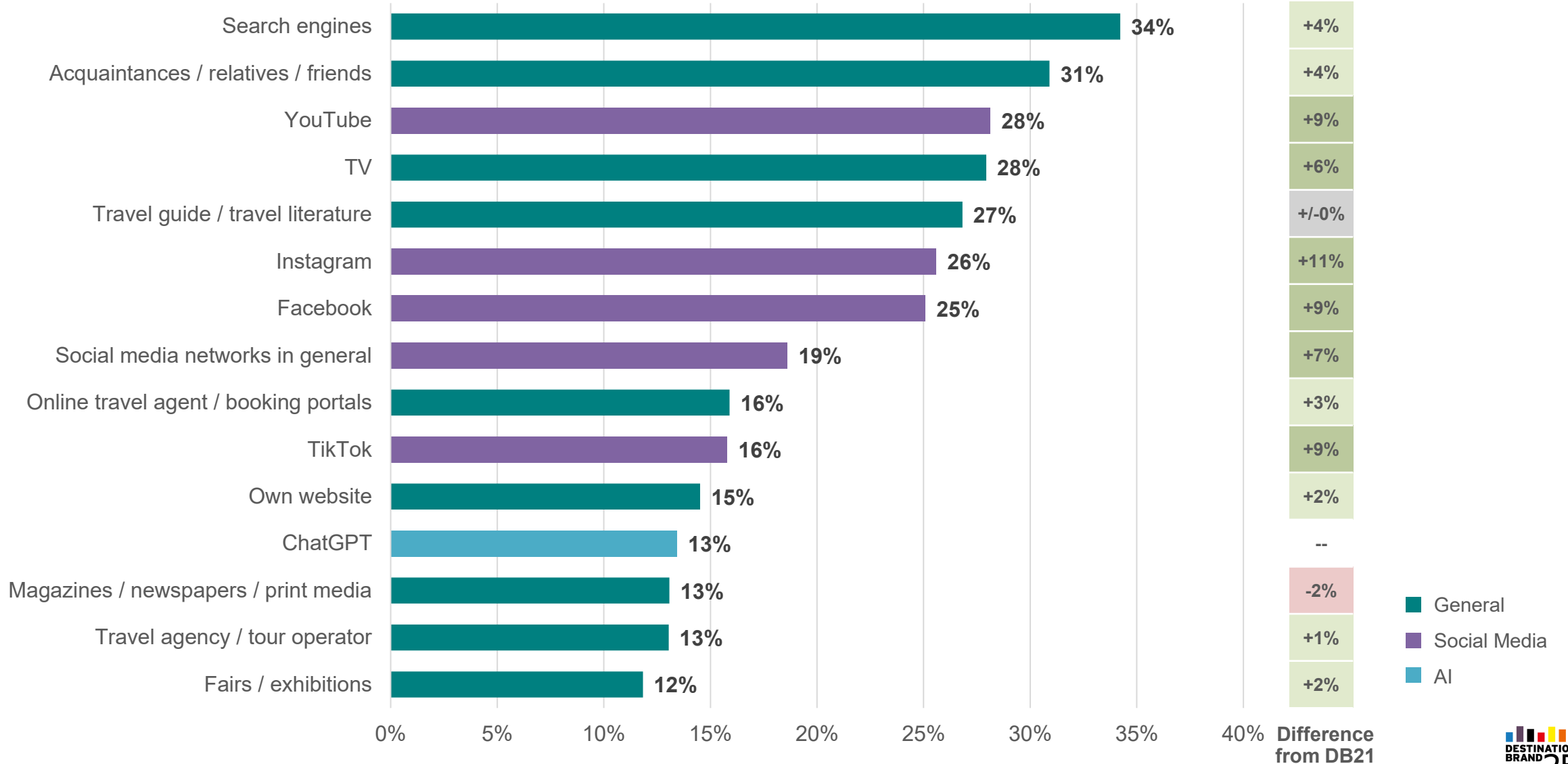


■ General
■ Social Media
■ AI

Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases



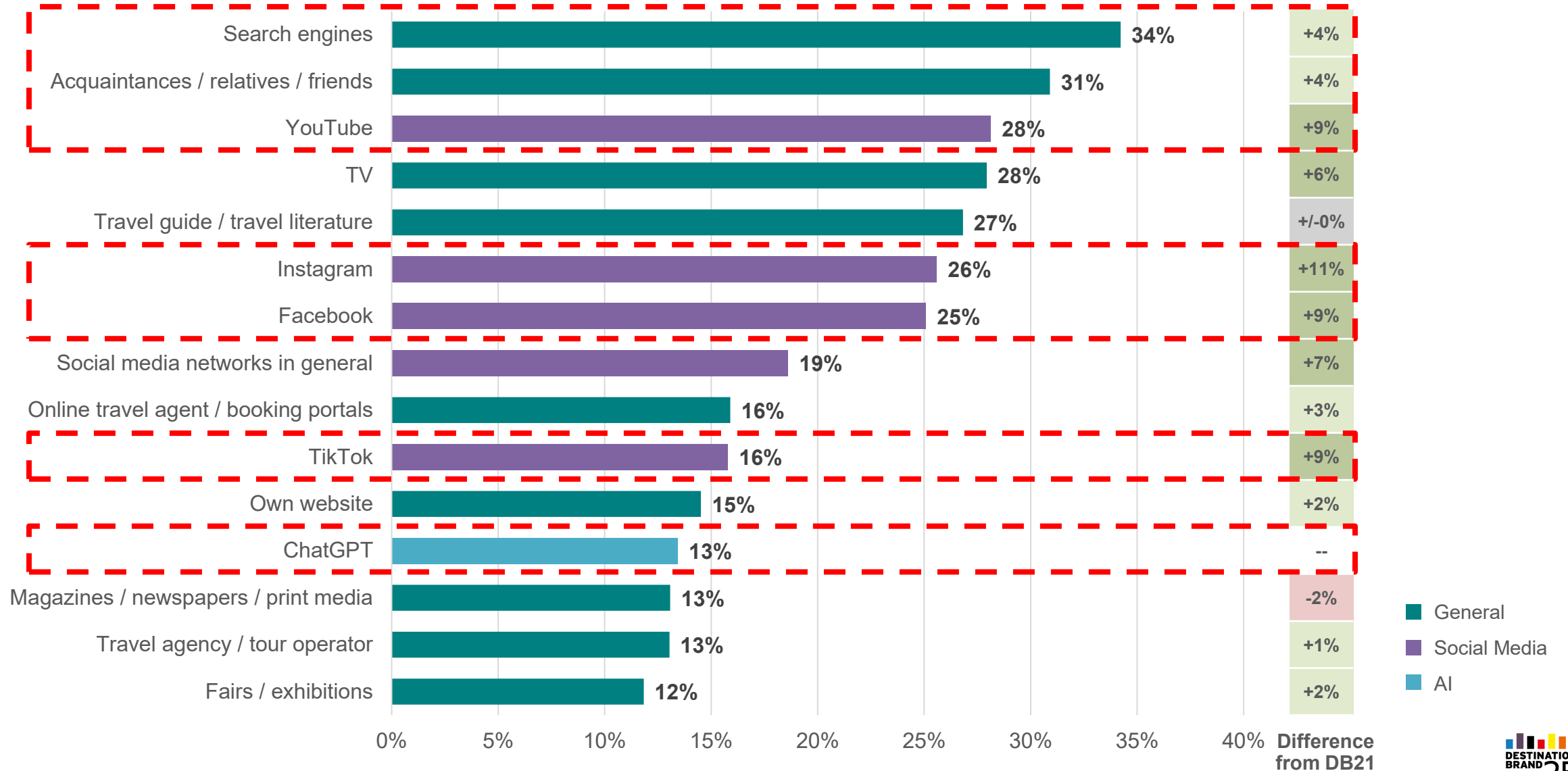
Top 15 sources of inspiration – USA: a more platform- and video-oriented profile



Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases

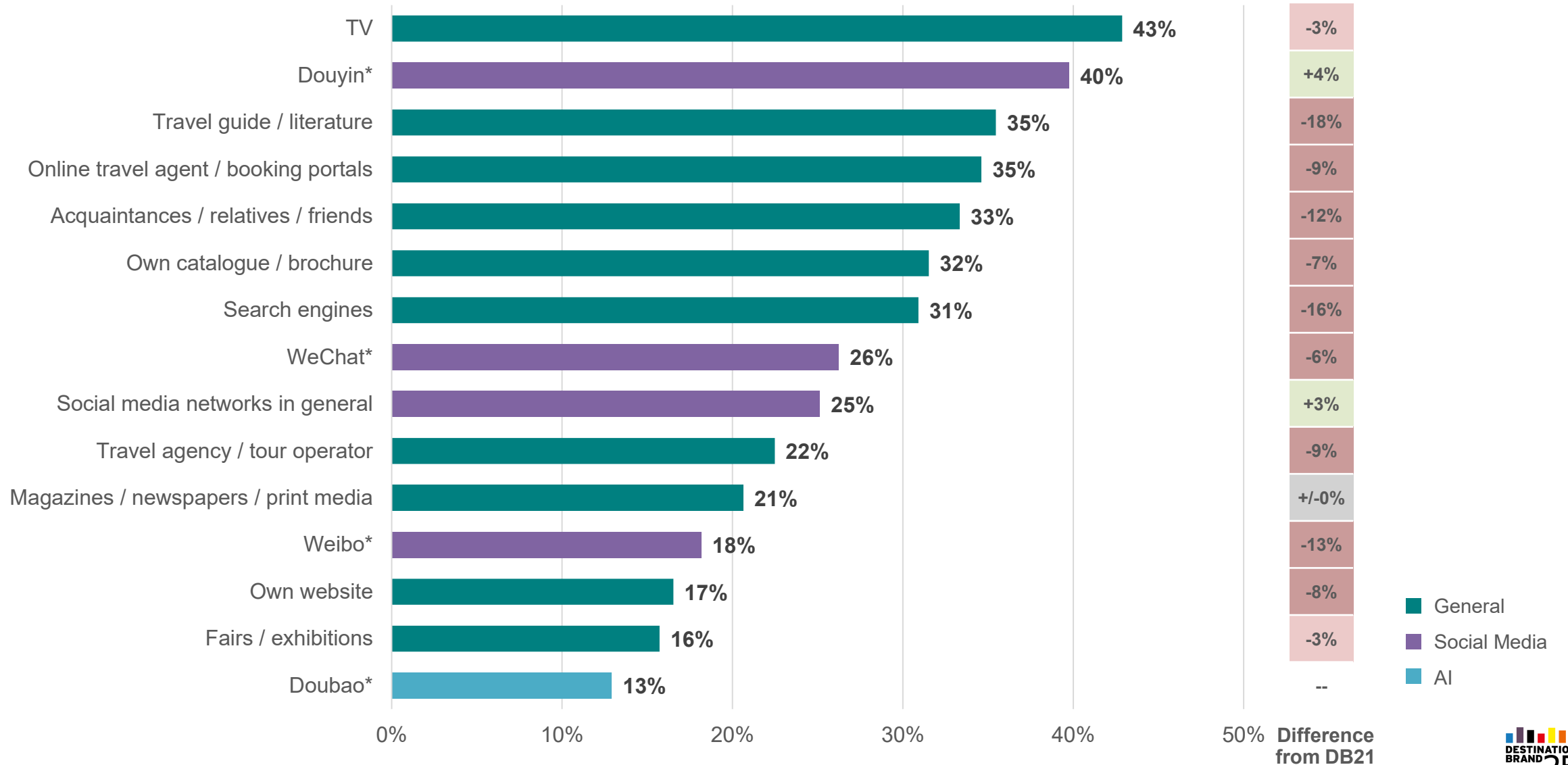


Top 15 sources of inspiration – USA: a more platform- and video-oriented profile



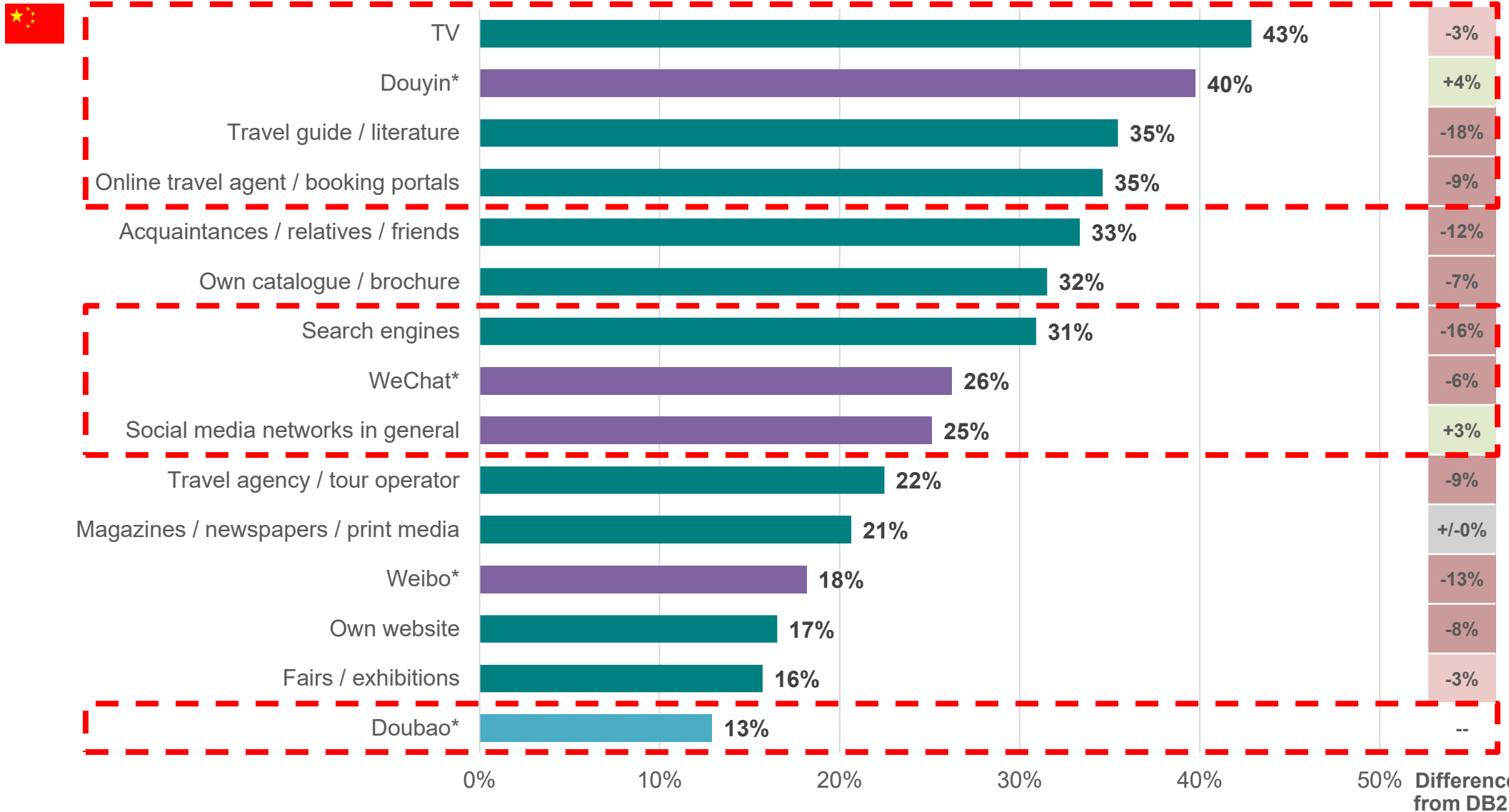
Source: inspektour (international) GmbH, 2025 Base: All respondents in USA n = 1.000, in % of cases

Top 15 sources of inspiration – China: driven by social & general sources of inspiration



Source: inspektour (international) GmbH, 2025 Base: All respondents in China n = 1.000, in % of cases

Top 15 sources of inspiration – China: driven by social & general sources of inspiration



■ General
■ Social Media
■ AI

Source: inspektour (international) GmbH, 2025 Base: All respondents in China n = 1.000, in % of cases



 **Germany**

under 25 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.
37%	40%	48%	48%	48%	41%
42%	35%	26%	15%	10%	3%
35%	26%	24%	21%	17%	9%
33%	20%	8%	7%	3%	2%
24%	15%	12%	7%	4%	4%

Search engines

Instagram

YouTube

TikTok

ChatGPT

United Kingdom 

under 25 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.
34%	41%	53%	56%	52%	52%
34%	44%	30%	13%	9%	2%
29%	31%	31%	19%	16%	11%
32%	37%	9%	3%	4%	1%
13%	15%	15%	6%	5%	2%

 **France**

under 25 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.
37%	50%	50%	51%	49%	45%
34%	26%	12%	12%	8%	1%
20%	23%	14%	17%	15%	4%
27%	14%	4%	6%	3%	0%
15%	17%	9%	8%	3%	3%

Search engines

Instagram

YouTube

TikTok

ChatGPT

USA 

under 25 y.	25-34 y.	35-44 y.	45-54 y.	55-64 y.	65-74 y.
29%	26%	36%	39%	39%	37%
37%	46%	31%	21%	8%	4%
32%	47%	29%	24%	17%	16%
25%	29%	18%	11%	6%	1%
17%	29%	17%	7%	4%	3%

China



	under 25 y.	25-34 y.	35-44 y.	45-59 y.**
Search engines	32%	39%	35%	22%
Douyin*	40%	54%	47%	26%
Youku Tudou*	2%	4%	6%	2%
WeChat*	29%	26%	26%	26%
Doubao*	16%	16%	18%	7%

Source: inspektour (international) GmbH, 2025 Base: All respondents in Germany n = 3.000, UK, FR, US & CN n = 1.000 each, in % of cases, * China-specific platforms ** In China our online panel reaches the urban population aged 14-59



Germany:

a hybrid inspiration profile

- recommendations and search both strong
- social media relevant, but not dominant
 - ChatGPT is already visible



United Kingdom:

search-led & growing strongly in social

- search is particularly strong
- general sources remain important
- social media shows the strongest momentum in Europe



China:

driven by social & general sources of inspiration

- Douyin stands out strongly
- TV and other general inspiration sources remain highly relevant
- the development pattern is more concentrated than in the other markets



France:

more search-led & less social-driven

- recommendations and search remain central
- broader inspiration sources still play an important role
- social media and ChatGPT are visible, but lower than in the UK and the US



USA:

more platform- & video-oriented

- search is relevant, but less dominant than in Europe
- growth across a greater number of platforms
- ChatGPT is already more visible than in several European markets

How guests discover destinations today

Implications for destination marketing

Build visibility across a broader inspiration mix

- combine recommendations, search, platforms and owned content
- avoid relying on one single inspiration source
- think in broader inspiration mixes, not isolated channels

Set different priorities by source market

- some markets are more search-led
- others are more platform- or media-driven
- China should be interpreted through its own platform set

Tailor communication to younger audiences

- age differences are strong in every market
- younger audiences over-index on different platforms depending on the market
- one youth strategy will not work equally well everywhere

Prepare for AI, but keep perspective

- AI is already visible in several markets
- usage is especially high among younger audiences
- AI still plays a smaller role than core inspiration sources

Contact person for the Destination Brand study series



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