Ipsos iris: Travel

August 2023

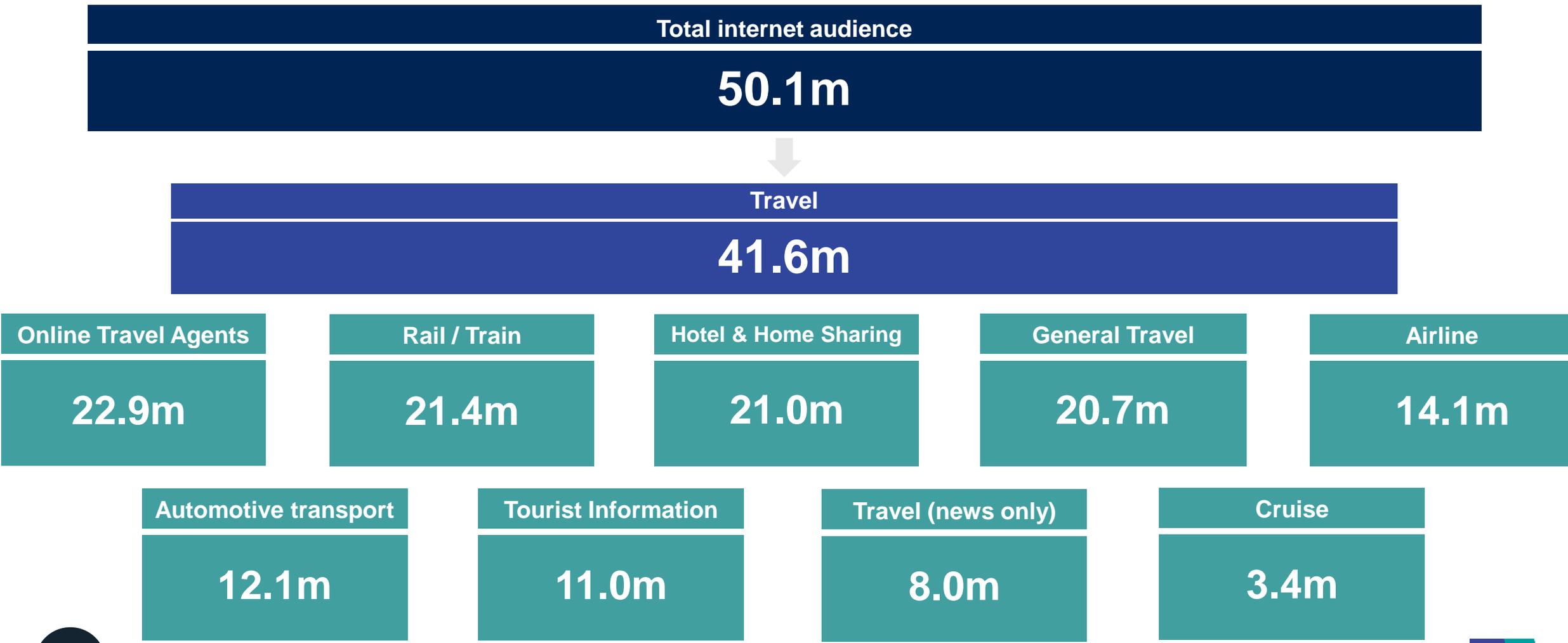**Ipsos iris**
The UK industry standard for
online audience measurement
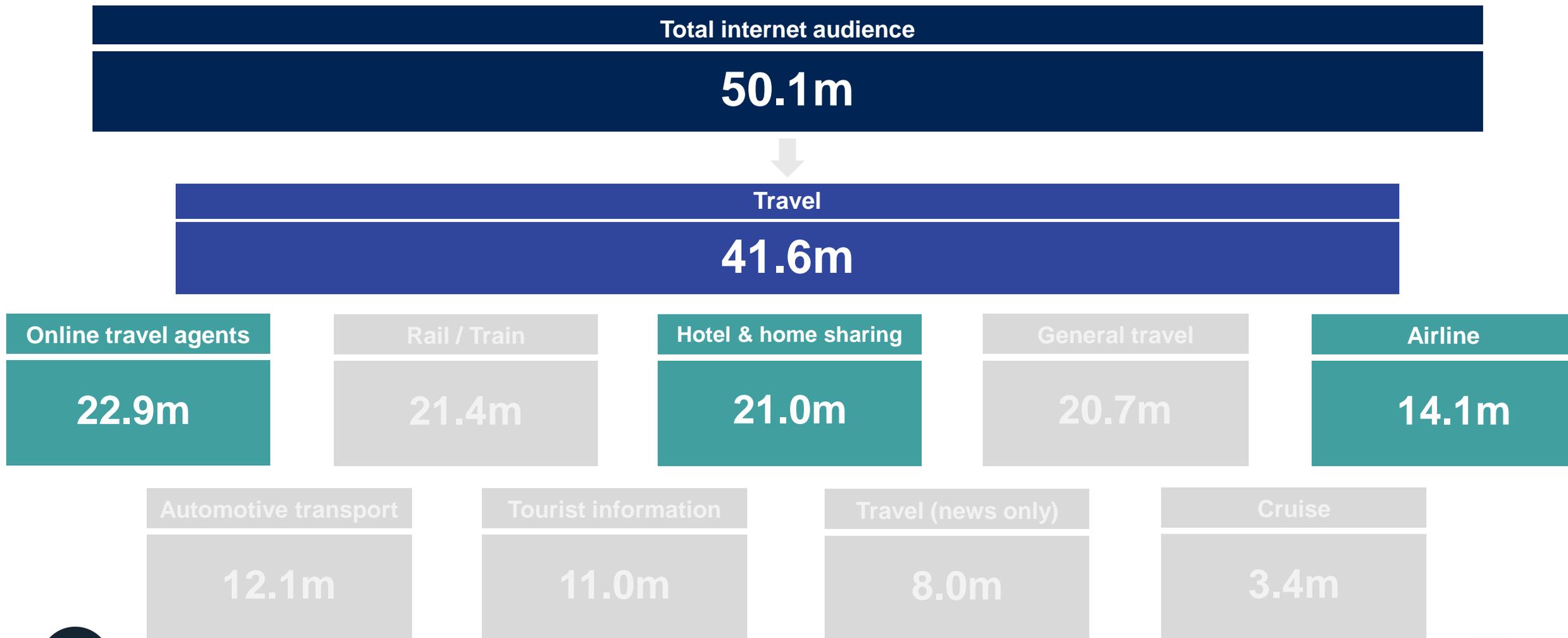
Travel brands reach almost 42 million visitors a month

Total internet audience

50.1m

Travel

41.6m

Online Travel Agents	Rail / Train	Hotel & Home Sharing	General Travel	Airline
22.9m	21.4m	21.0m	20.7m	14.1m

Automotive transport	Tourist Information	Travel (news only)	Cruise
12.1m	11.0m	8.0m	3.4m

We'll be focusing on three holiday categories: 'Online travel agents', 'Hotel & home sharing' and 'Airlines'

Total internet audience

50.1m

Travel

41.6m

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22.9m	21.4m	**21.0m**	20.7m	**14.1m**

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Key objectives

1 OPPORTUNITY SIZING

Understand the seasonality of the travel category and how this can inform marketing, sales and content planning

2 AUDIENCE PROFILE

Understand the different profiles and needs of audiences across travel categories, and the opportunities this unlocks

3 ADVERTISING & PARTNERSHIPS

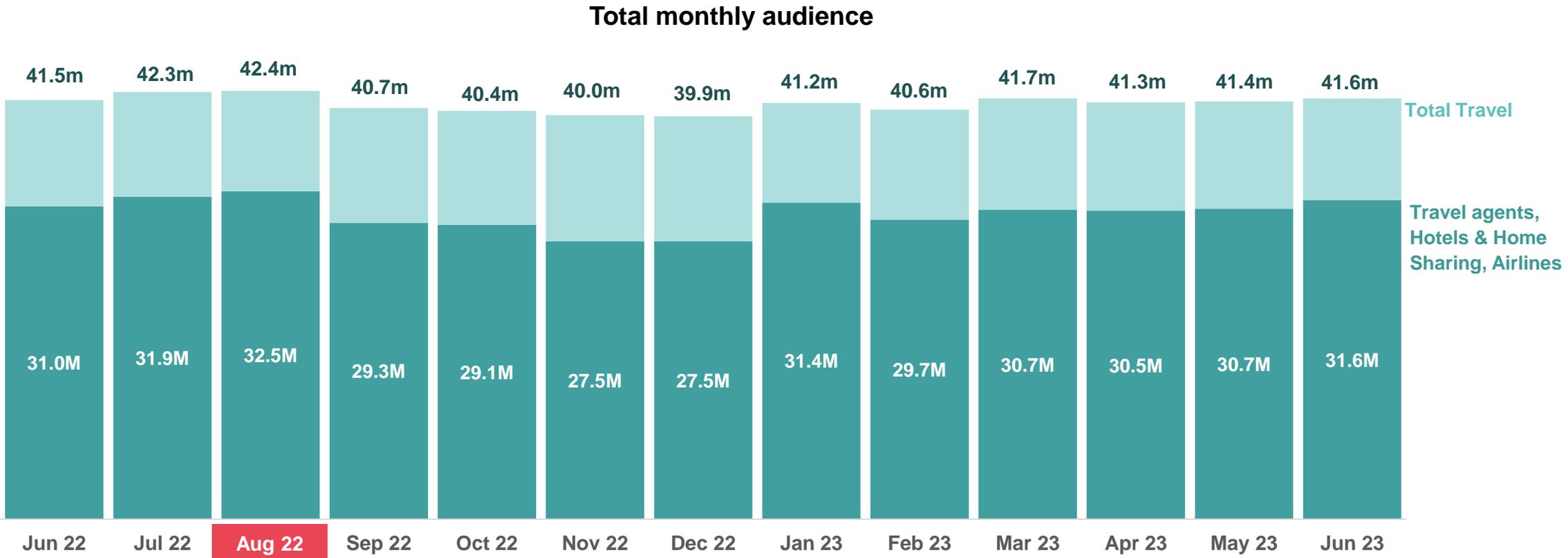Understand the best media and brand partnerships to deliver reach and drive growth
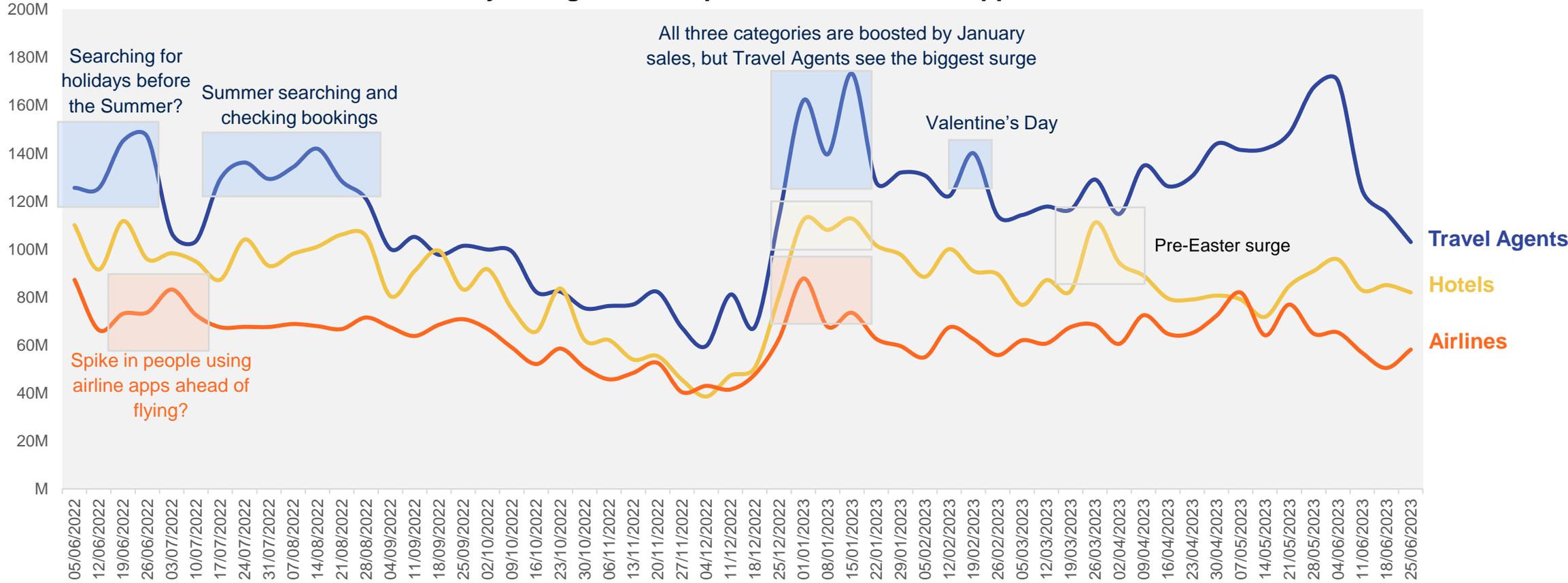
OPPORTUNITY SIZING

01

The audience across travel agents, hotels & home sharing and airlines peaked in August 2022

Total monthly audience

Total Travel

Travel agents, Hotels & Home Sharing, Airlines

	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23
Total	41.5m	42.3m	42.4m	40.7m	40.4m	40.0m	39.9m	41.2m	40.6m	41.7m	41.3m	41.4m	41.6m
Travel agents etc.	31.0M	31.9M	32.5M	29.3M	29.1M	27.5M	27.5M	31.4M	29.7M	30.7M	30.5M	30.7M	31.6M

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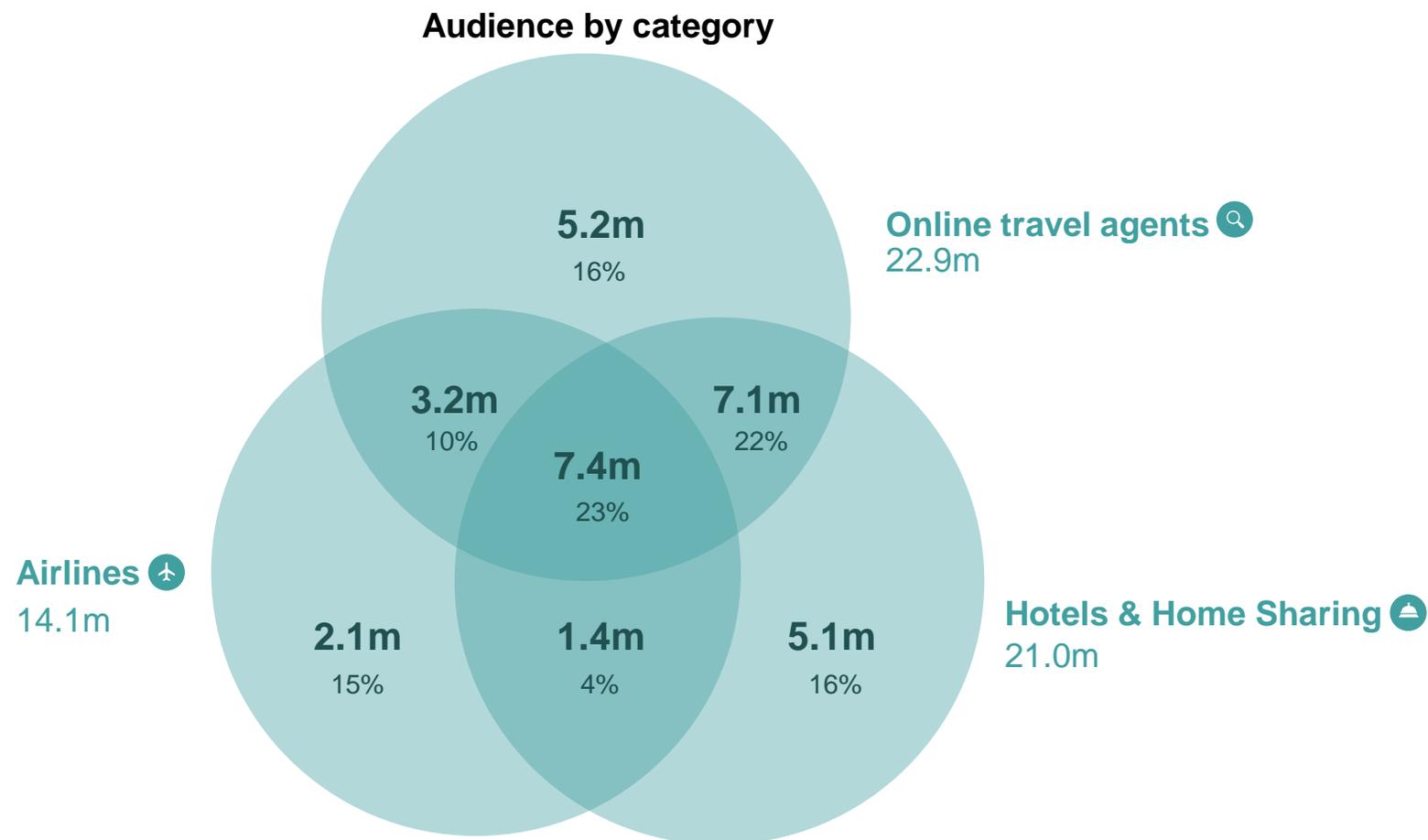# Engagement spikes in the January sales

Travel agents see the biggest peak of any category in January – even relative to their larger audience. How can hotels and airlines cultivate similar peaks among their visitors?

Weekly change in time spent on websites and apps

Searching for holidays before the Summer?

Summer searching and checking bookings

All three categories are boosted by January sales, but Travel Agents see the biggest surge

Valentine's Day

Spike in people using airline apps ahead of flying?

Pre-Easter surge

Travel Agents

Hotels

Airlines

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Over 7 million people visited all three categories in June

23% of these travel visitors visited all three categories during the month. How do you ensure you stand out in this crowded market? How do you ensure you're the final step on the booking journey?
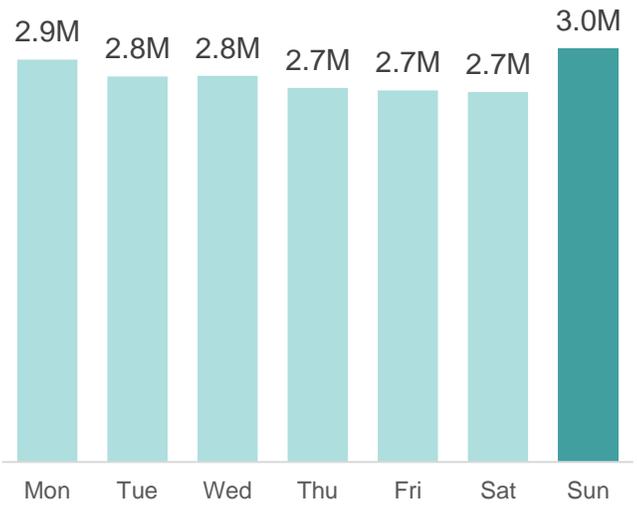
Audience by category

5.2m
16%

Online travel agents 🔍
22.9m

3.2m
10%

7.1m
22%

7.4m
23%

Airlines ✈
14.1m

Hotels & Home Sharing ⬢
21.0m

2.1m
15%

1.4m
4%

5.1m
16%

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Sunday is key for agents and hotels, while airlines peak on Mondays
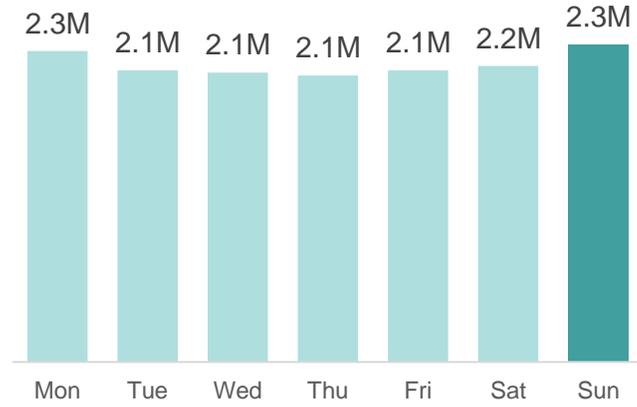
Saturdays have some of the lowest audiences: Are visitors looking to shake that back-to-work feeling? Does the day of the week change the context for communications and therefore messaging?
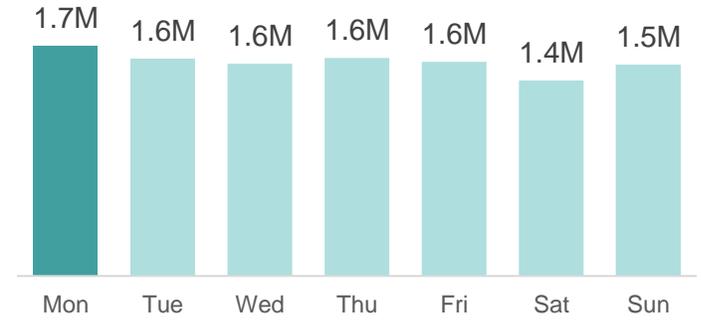
Average daily audience by day of the week

Online travel agents 🔍

Mon	Tue	Wed	Thu	Fri	Sat	Sun
2.9M	2.8M	2.8M	2.7M	2.7M	2.7M	3.0M

Hotels & Home Sharing ⛴

Mon	Tue	Wed	Thu	Fri	Sat	Sun
2.3M	2.1M	2.1M	2.1M	2.1M	2.2M	2.3M

Airlines ✈

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1.7M	1.6M	1.6M	1.6M	1.6M	1.4M	1.5M

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# Visitors spend almost 40% longer on online travel agents

Does the variety on offer on travel agent sites mean visitors will naturally spend longer on them? Or should airlines and hotels look at engaging visitors for longer each month?

Average time spent visiting each month

Online travel agents 🔍

Hotels & Home Sharing ⏏

Airlines ✈

24m 53s

18m 10s

18m 07s

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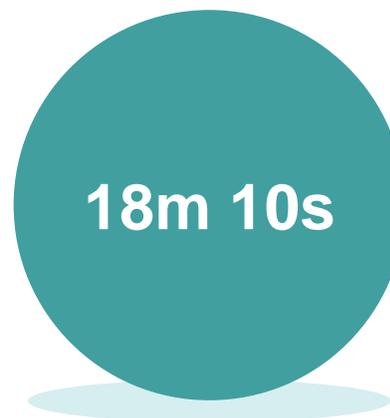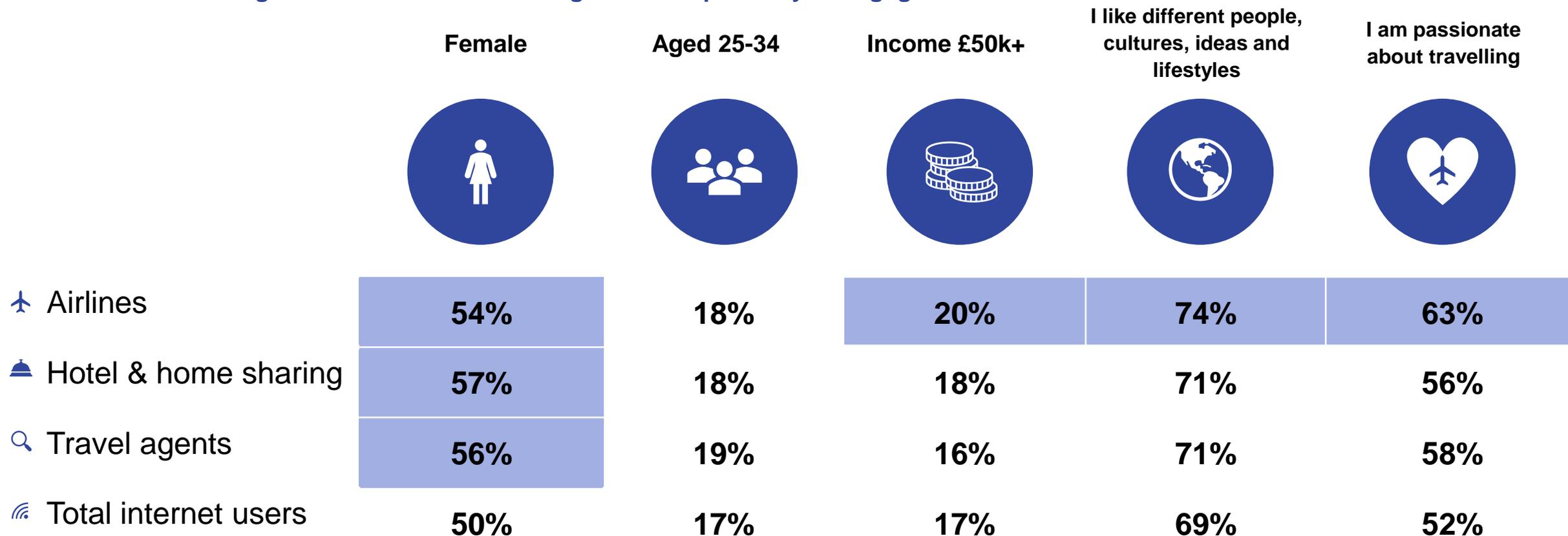
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AUDIENCE PROFILE

02

Women make up the majority across all three categories. Airlines visitors are wealthier and more passionate about travel.

Reaching a female audience is important across all three categories. Their visitors are similar, but airlines are higher income and interested in travelling and new cultures. How might this shape how you engage this audience?

	Female	Aged 25-34	Income £50k+	I like different people, cultures, ideas and lifestyles	I am passionate about travelling
✈ Airlines	54%	18%	20%	74%	63%
🛎 Hotel & home sharing	57%	18%	18%	71%	56%
🔍 Travel agents	56%	19%	16%	71%	58%
⌇ Total internet users	50%	17%	17%	69%	52%

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Booking.com has the largest audience…

Booking.com has the largest market share of any brand across the categories. Jet2 has managed to grow share across two very competitive markets, what can we learn from their strategy?

Total Audience

Online travel agents 🔍		Hotels & Home Sharing ⛴		Airlines ✈	
1 Booking.com	15.1m	1 airbnb	8.1m	1 easyJet	8.1m
2 Jet2.com	4.5m	2 Premier Inn	4.0m	2 BRITISH AIRWAYS	6.1m
3 Skyscanner	3.8m	3 Travelodge	3.3m	3 RYANAIR	3.8m
4 Expedia	3.6m	4 Hotels.com	2.1m	4 Jet2	2.2m
5 TUI	3.1m	5 Hilton	1.5m	5 WIZZ	0.7m

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…but Airbnb has the largest exclusive audience

Airbnb's original proposition has given it a large exclusive audience. Clear propositions and positioning from Hilton in hotels and Jet2 in airlines mean that, despite their size, they have large exclusive audiences too. How can you find your position in a crowded market?

% of visitors that don't visit any other of the other top five brands in the category

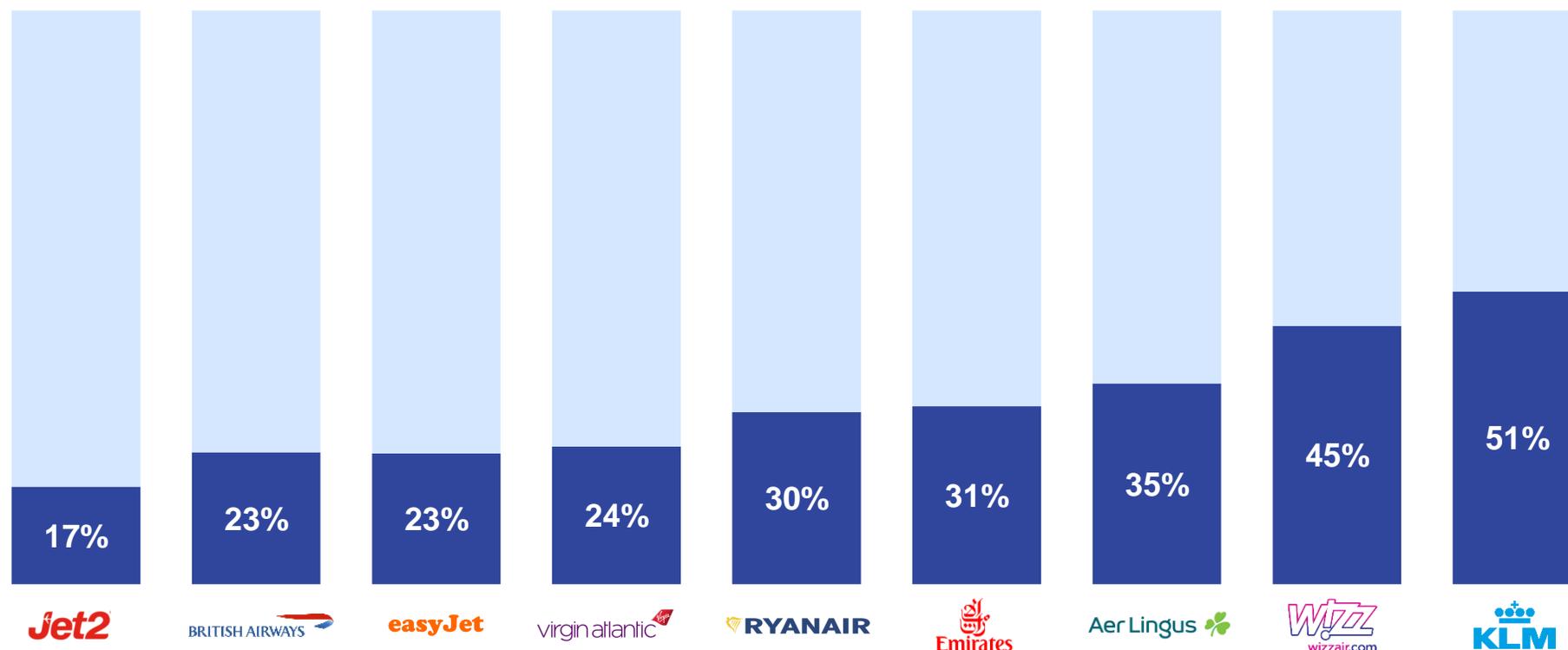|	Online travel agents 🔍		Hotels & Home Sharing ⛴		Airlines ✈
1	Booking.com — 56%	1	airbnb — 70%	1	easyJet — 44%
2	Jet2.com — 28%	2	Premier Inn — 39%	2	BRITISH AIRWAYS — 51%
3	Skyscanner — 25%	3	Travelodge — 38%	3	RYANAIR — 41%
4	Expedia — 18%	4	Hotels.com — 42%	4	Jet2 — 54%
5	TUI — 22%	5	Hilton — 51%	5	Wizz — 23%

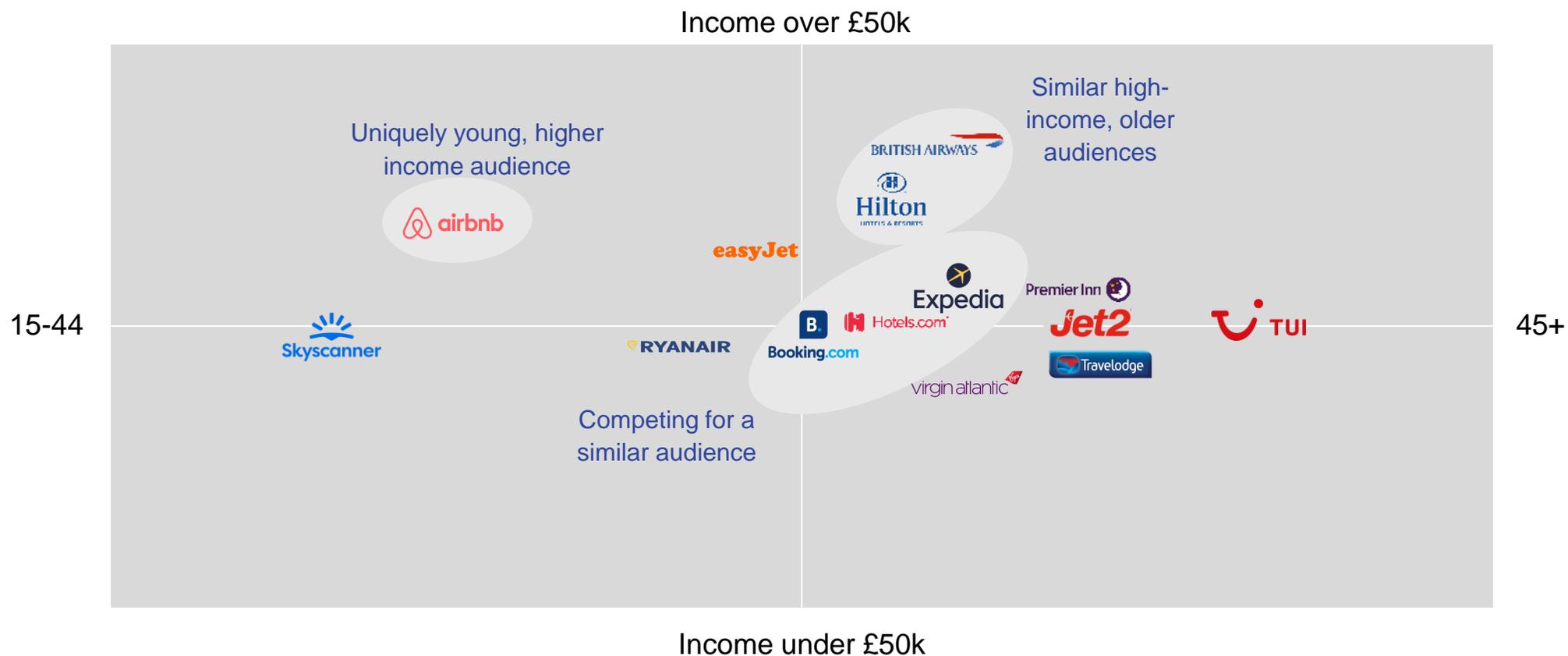# Jet2 also has the fewest visitors going to Skyscanner

We see a similar picture for Jet2 if we look specifically at the share of visitors using Skyscanner. KLM visitors are the most likely to visit Skyscanner, while Emirates' visitors are more likely to visit Skyscanner compared to premium competitors like BA and Virgin

Percentage of visitors who also visit Skyscanner each month

Jet2	BRITISH AIRWAYS	easyJet	virgin atlantic	RYANAIR	Emirates	Aer Lingus	wizz wizzair.com	KLM
17%	23%	23%	24%	30%	31%	35%	45%	51%

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The top travel brands attract a higher income, older audience

Airbnb stands out with a young, wealthy audience. Booking.com, Hotels.com and Expedia, are all competing for a similar mass-market audience

Income over £50k

Uniquely young, higher income audience

Similar high-income, older audiences

BRITISH AIRWAYS

Hilton
HOTELS & RESORTS

airbnb

easyJet

Expedia

Premier Inn

15-44

Skyscanner

RYANAIR

B. Hotels.com

Jet2

TUI

Booking.com

Travelodge

45+

virgin atlantic

Competing for a similar audience

Income under £50k

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There is opportunity to tease out differences between travel agent aggregators

Understanding what makes each audience can help deliver cut through to help increase market share

	Prepared to pay more for environmentally friendly products	I like to keep up with the latest fashions	I only buy products from a company whose ethics I agree with	I keep up with developments in technology
Booking.com	**46%**	14%	26%	45%
Expedia	40%	**16%**	26%	46%
Hotels.com	43%	14%	**31%**	**52%**

ADVERTISING & PARTNERSHIPS

03

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The trend for travel news follows wider travel browsing

While less time is spent with travel news overall, the trend is broadly similar to travel shopping. This is an audience interested in travel that is engaged at key sales periods throughout the year. Are you targeting this primed audience?

Weekly change in time spent on websites and apps

Y-axis (left): Time spent - Travel agents, Hotels & home sharing and airlines
Y-axis (right): Time spent – Travel news

Lines labelled: Travel Agents, Hotels, Airlines, Travel News
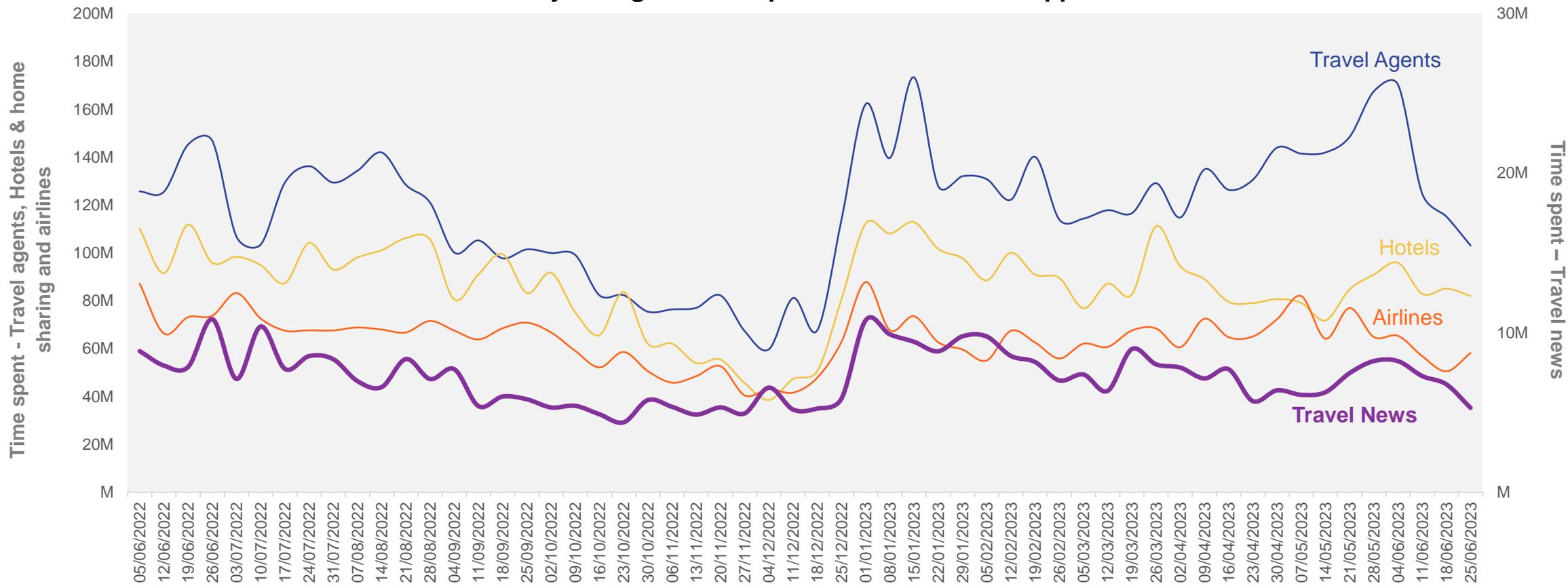
Travel news visitors also skew female, but are older

There are many similarities between the news audience and other categories in data. But News visitors skew older and are less engaged with the environment, which may influence the best messaging for them.
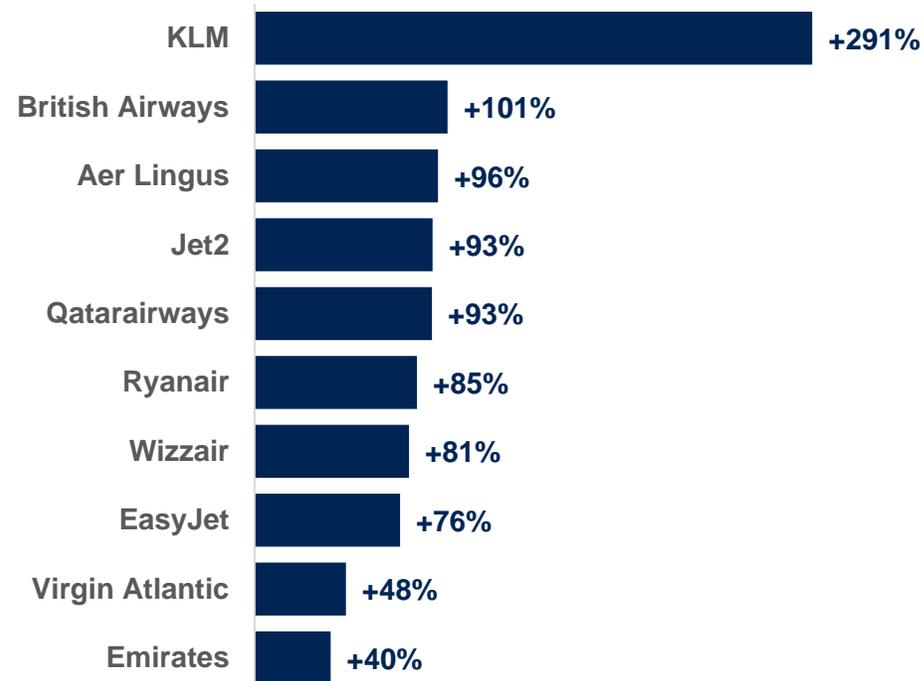
	Female	Aged 55+	Income £50k+	"I'm prepared to make lifestyle compromises to benefit the environment"	Heavy social networking visitors
Travel news audience	**55%**	**38%**	**18%**	**52%**	**37%**
Airlines	54%	34%	20%	56%	34%
Hotel & home sharing	57%	35%	18%	56%	34%
Travel agents	56%	36%	16%	56%	33%
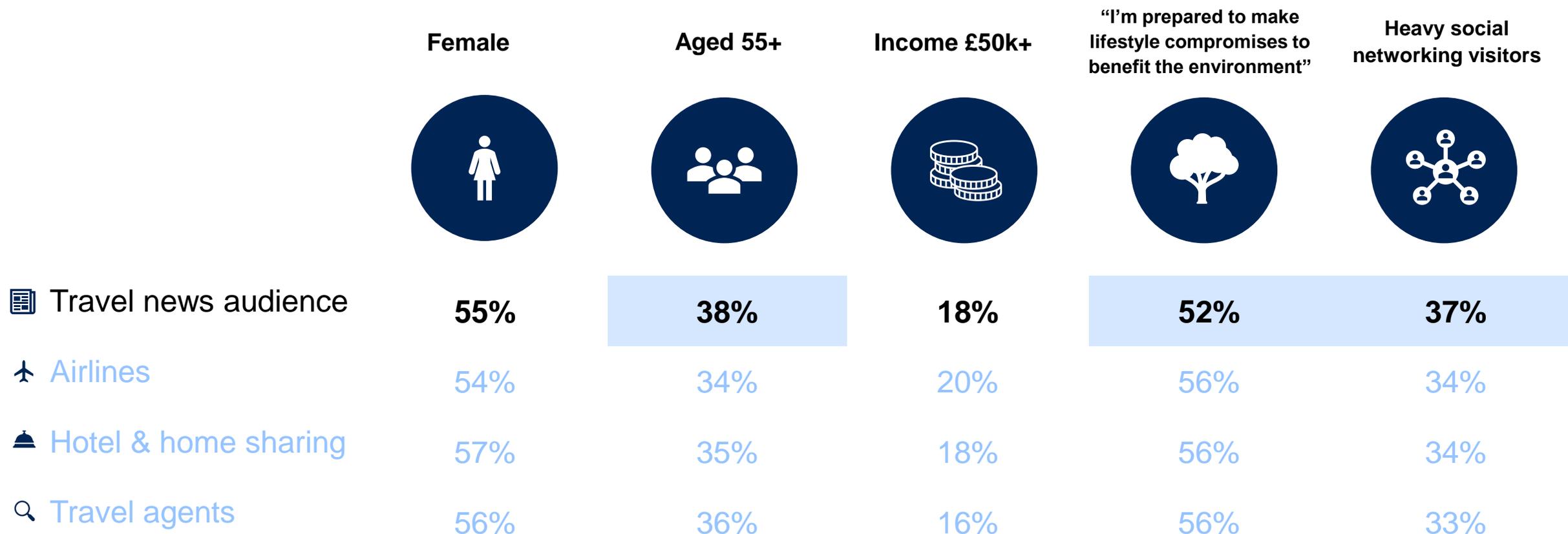
Travel news visitors are an intentional audience: they are much more likely to visit travel retail sites

Travel news readers aren't just interested in reading about travel: they are more likely to also visit airlines, hotels & house sharing and travel agents site in the same month. How can this active audience help you to drive up visits and conversion.

% likelihood to visit vs total internet audience

Category	%
Airlines	+66%
Hotels & House Sharing	+53%
Travel Agents	+48%

% likelihood to visit vs total internet audience

Airline	%
KLM	+291%
British Airways	+101%
Aer Lingus	+96%
Jet2	+93%
Qatarairways	+93%
Ryanair	+85%
Wizzair	+81%
EasyJet	+76%
Virgin Atlantic	+48%
Emirates	+40%
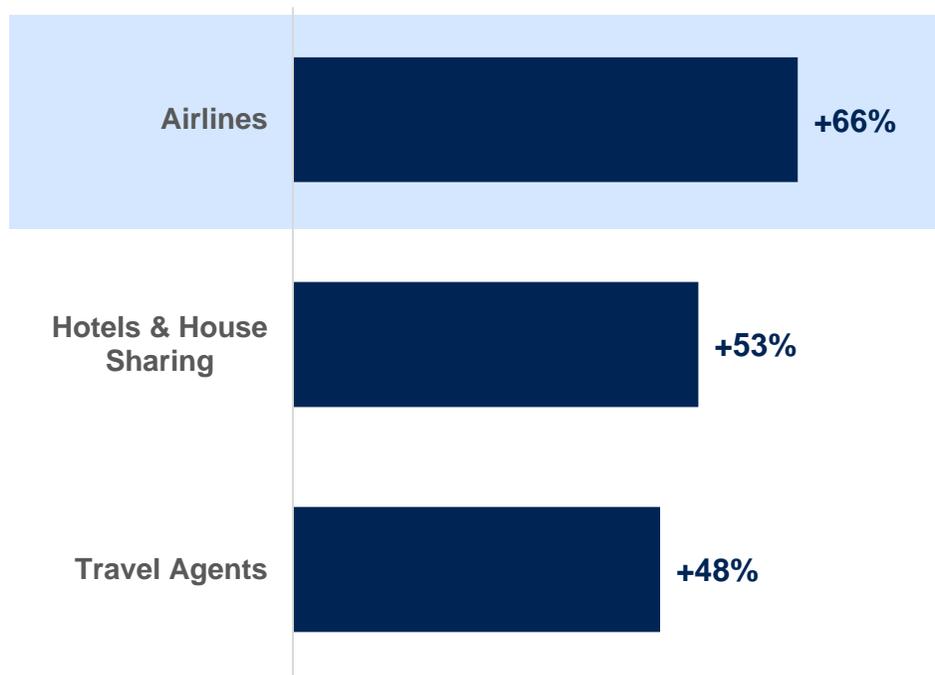
Visitors to each of the top five travel news sites are significantly more likely to visit the biggest travel brands

Finding the right travel news partner for your brand = reaching the right customers, at the right time, in the right context
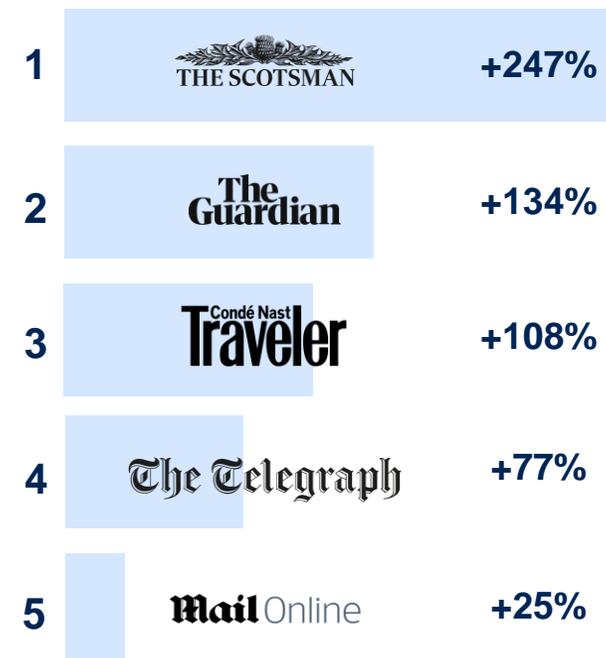
Top 5 Travel News sites / sections by audience

#	Site	Audience
1	**Mail** Online	1.4m
2	The Guardian	1.1m
3	The Telegraph	1.0m
4	Condé Nast Traveler	0.9m
5	THE SCOTSMAN	0.2m

Likelihood to visit Booking.com vs total internet audience

#	Site	%
1	Condé Nast Traveler	+86%
2	The Guardian	+71%
3	The Telegraph	+65%
4	THE SCOTSMAN	+64%
5	**Mail** Online	+52%
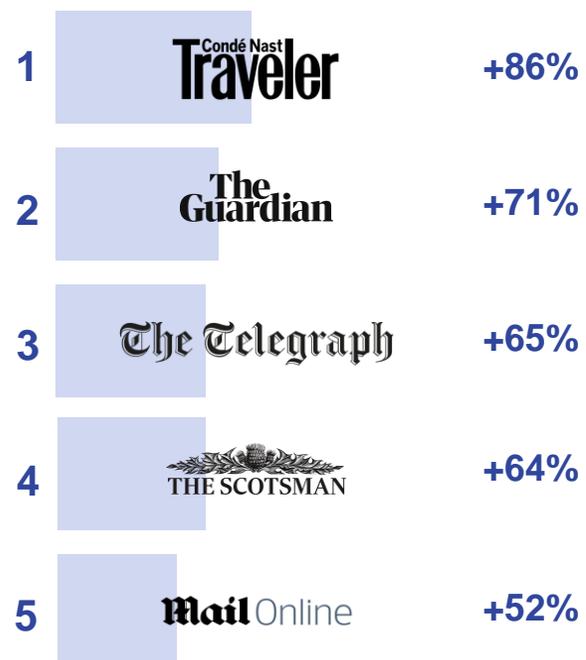
Likelihood to visit Airbnb vs total internet audience

#	Site	%
1	THE SCOTSMAN	+247%
2	The Guardian	+134%
3	Condé Nast Traveler	+108%
4	The Telegraph	+77%
5	**Mail** Online	+25%

Social media offers another effective means for reaching travel visitors
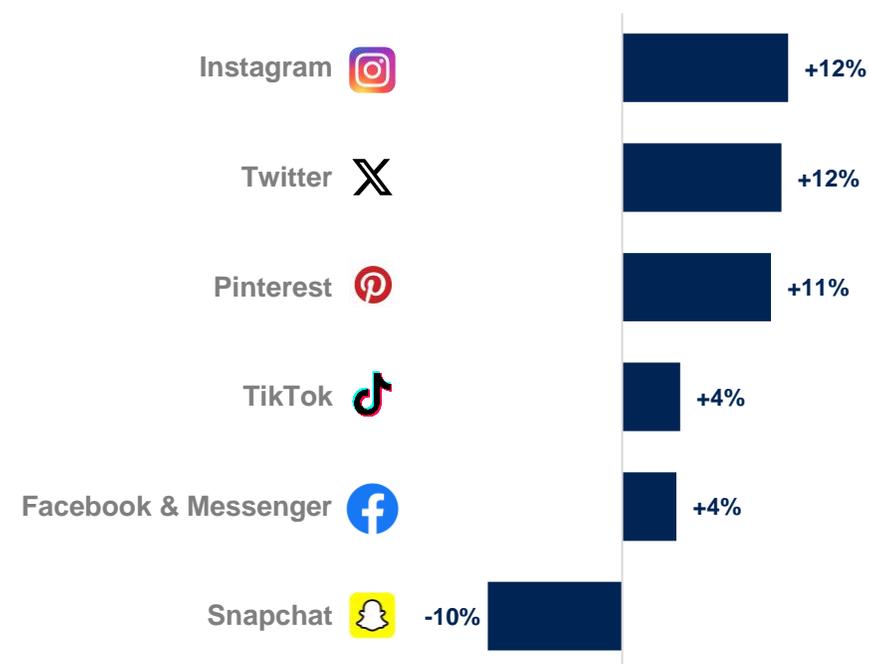
You can match your brand to the right social media platforms for you: EasyJet visitors are big users of Pinterest and Snapchat, while British Airways visitors are more likely to be on Instagram and Twitter. Where should your brands be advertising?

Likelihood to visit vs all internet users

Platform	
Pinterest	+30%
Snapchat	+26%
TikTok	+16%
Instagram	+16%
Twitter	+9%
Facebook & Messenger	+6%
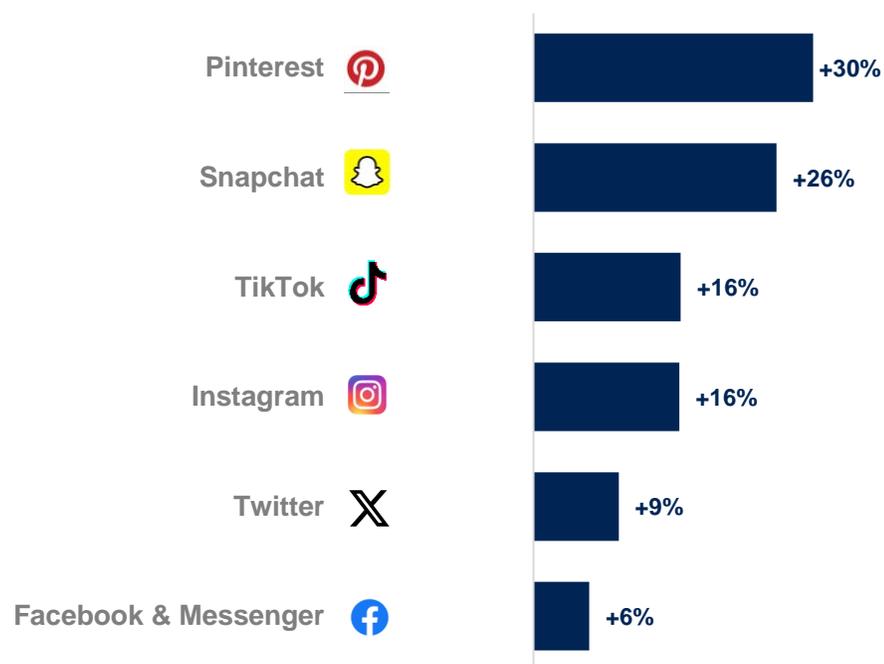
easyJet

Likelihood to visit vs all internet users

Platform	
Instagram	+12%
Twitter	+12%
Pinterest	+11%
TikTok	+4%
Facebook & Messenger	+4%
Snapchat	-10%

BRITISH AIRWAYS

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EasyJet + Pinterest creates a younger, female audience of heavy travel visitors

By finding the right partner you can create a more specific audience. Which media can you use to grow your share amongst core targets?

Shared audience

11.2m   2.1m   4.0m
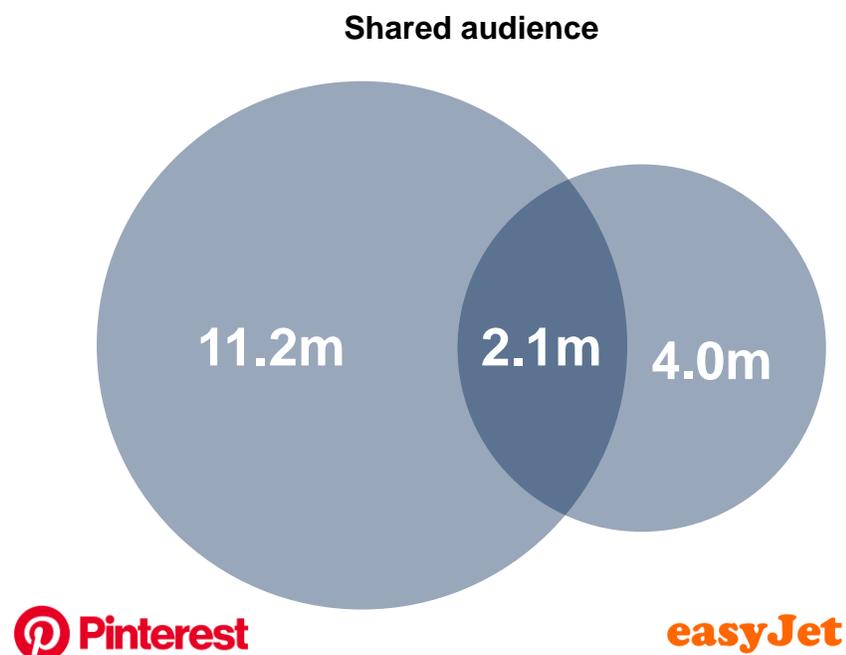
Pinterest   easyJet

	easyJet	easyJet + Pinterest	Difference
18-24	11%	19%	+69% ▲
Female	61%	74%	+22% ▲
Earn £50k+	20%	16%	-19% ▼
Heavy online travel visitors	56%	60%	+8% ▲
Agree they like to go to trendy places to eat & drink	25%	31%	+23% ▲

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There is potential for partnerships across travel brands, too

The highest audience crossover is between Booking.com and Ryanair. However, Virgin Atlantic visitors are particularly likely to visit Hotels.com. Could a partnership be beneficial to both parties? How can this help choose where to push promoted offers?

% of airline visitors who have also visited each comparison site

	easyJet	BRITISH AIRWAYS	RYANAIR	Jet2	virgin atlantic
Tripadvisor	57%	52%	58%	59%	50%
Booking.com	59%	52%	62%	58%	54%
Expedia	17%	21%	15%	18%	21%
Hotels.com	9%	9%	9%	9%	12%

Key takeaways – Travel

OPPORTUNITY SIZING: NEW YEAR, NEW OPPORTUNITES

January sales drive the highest engagement all year. Online travel agents do particularly well during this period, **how can airlines and hotel and home sharing sites drive similar levels of activity?**

AUDIENCE PROFILE: A FEMALE FOUNDATION

Women make up the majority of visitors across all three categories. Audiences tend to be higher income, particularly for the biggest brands. **How do you reach this female audience? Can you find a way to engage lower income audiences, too?**

PARTNERSHIPS: NEWS LEADS TO VIEWS

Travel News visitors are much more likely to visit all three categories, particularly airlines. Their visitation pattern closely follows the three categories, too, meaning they're engaged at key times of the year. **Are you taking advantage of this engaged audience?**

PARTNERSHIPS: SOCIAL MOBILITY

Travel visitors are also active on social media: these shared audiences offer the chance to create smaller, more bespoke targets with more tailored messaging. **Which social media is the best partner for your brand? Which ones haven't you explored?**

FOR MORE INFORMATION

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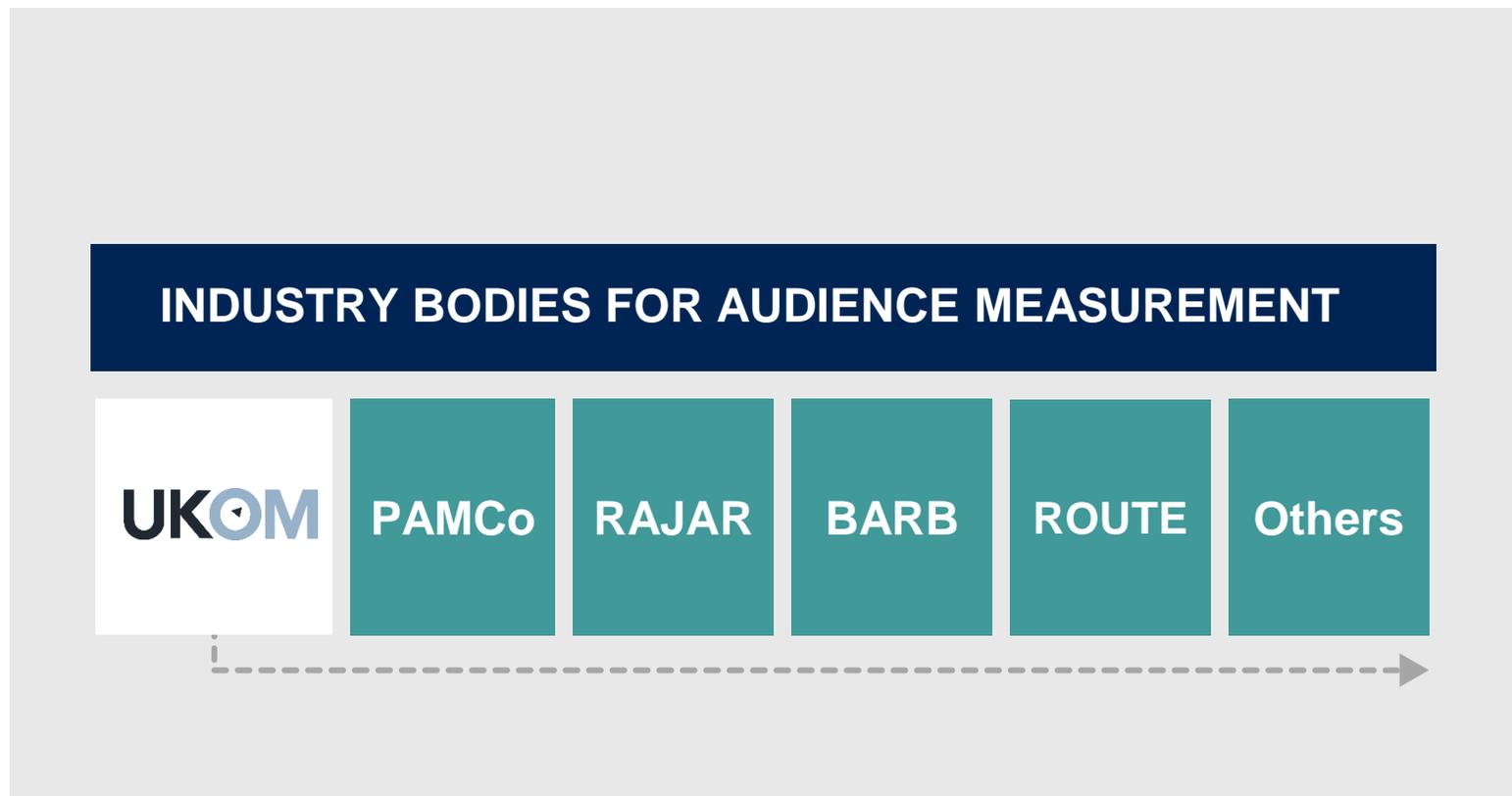
About
Ipsos iris

Online is complex

Tech creates constant change

Enormous amounts of data is gathered every day

You need to trust that the data you're using is objective, trusted, and correctly informs your business decisions

Ipsos iris is the only industry endorsed online solution

INDUSTRY BODIES FOR AUDIENCE MEASUREMENT

UKOM | PAMCo | RAJAR | BARB | ROUTE | Others

Challenges you may be facing

1|
Continuous change

2|
Pressure to deliver ROI on budgets

3|
Winning and retention of business

Used across teams and aids collaboration

Data	Insights	Strategy	Engagement	Planning	Activation

Build audiences to deliver on KPIs

Market understanding and trends
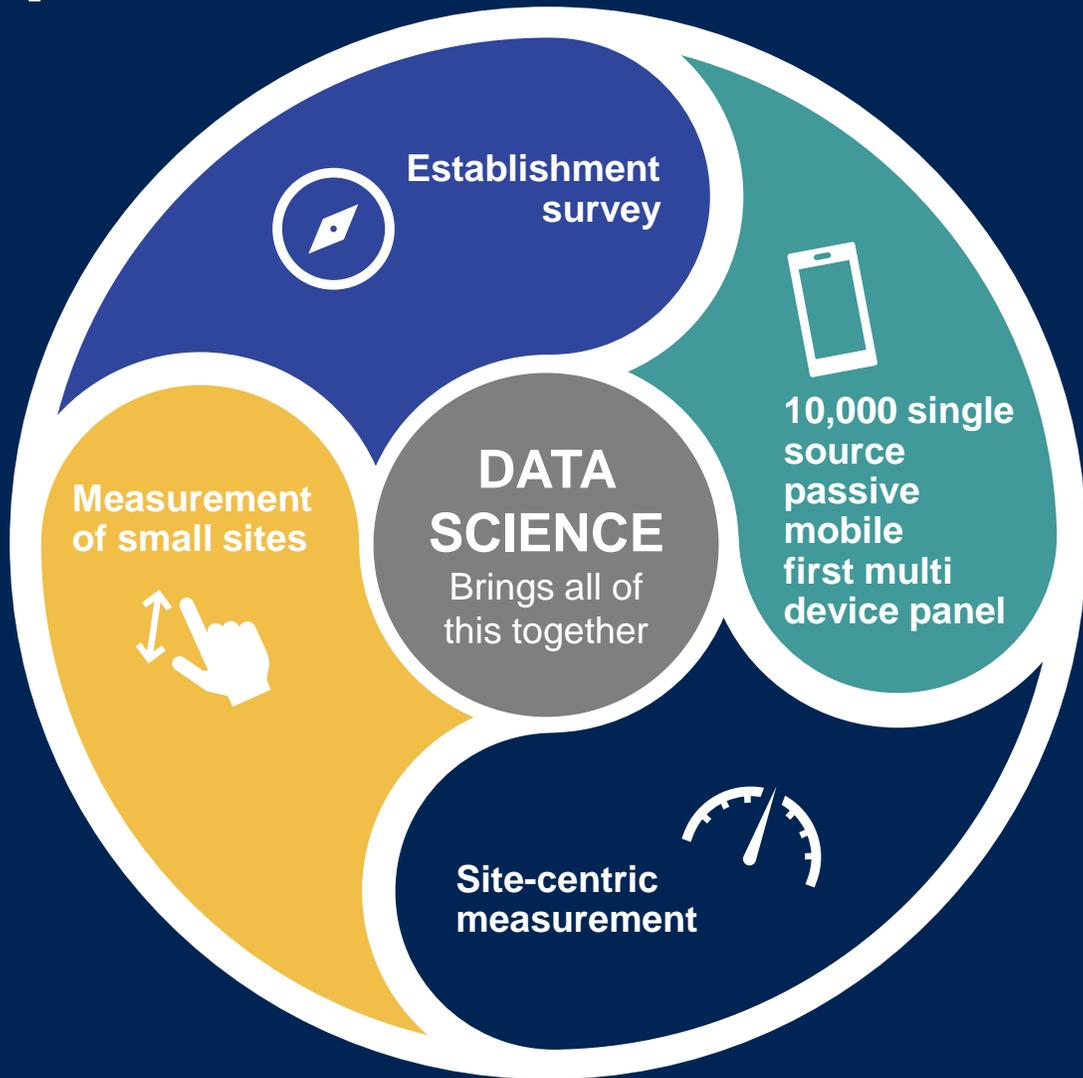
Brand and competitor engagement

Where audiences go and what content they consume

Smarter thinking, more differentiation

Key pillars of approach

Reports available

Media

Analyse media entities by target group. The results are based on your selection and category filters.

Media Plus

A flat reporting structure. The results are static and not based on your selection and category filters.

Category

Analyse top categories performance during selected months.

Profiling

Identify the profile composition of selected media.

Ranking

Rank organisations, brands, websites and apps.

Cross-visiting

Analyse cross visitation and duplication of audiences between different media entities.

% Change

Analyse the differences and changes between different time period.

Dayparts

See the breakdown of the selected media or category by time-of-day.

Trend Analysis

Check the performance of the selected media through multiple period of times.