

Ipsos iris: Travel

August 2023

Ipsos iris

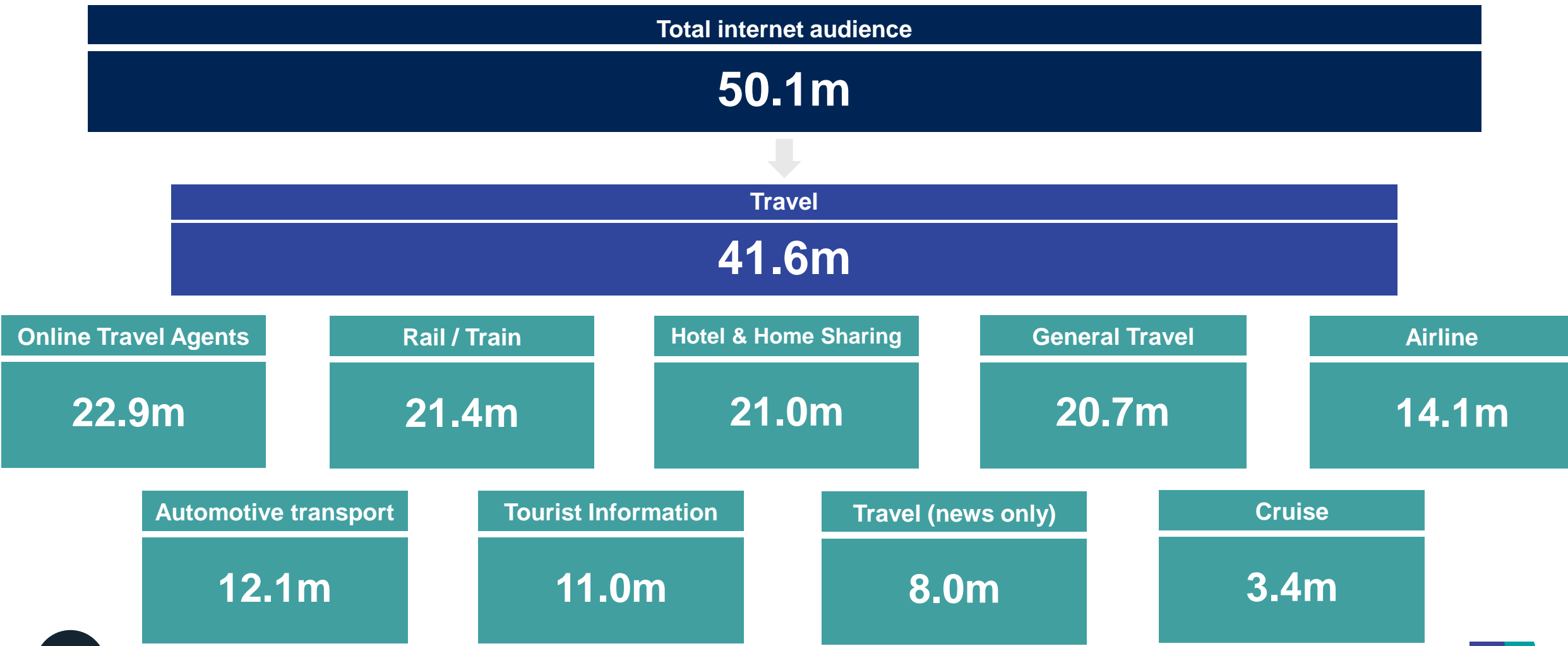
The UK industry standard for
online audience measurement

UKOM

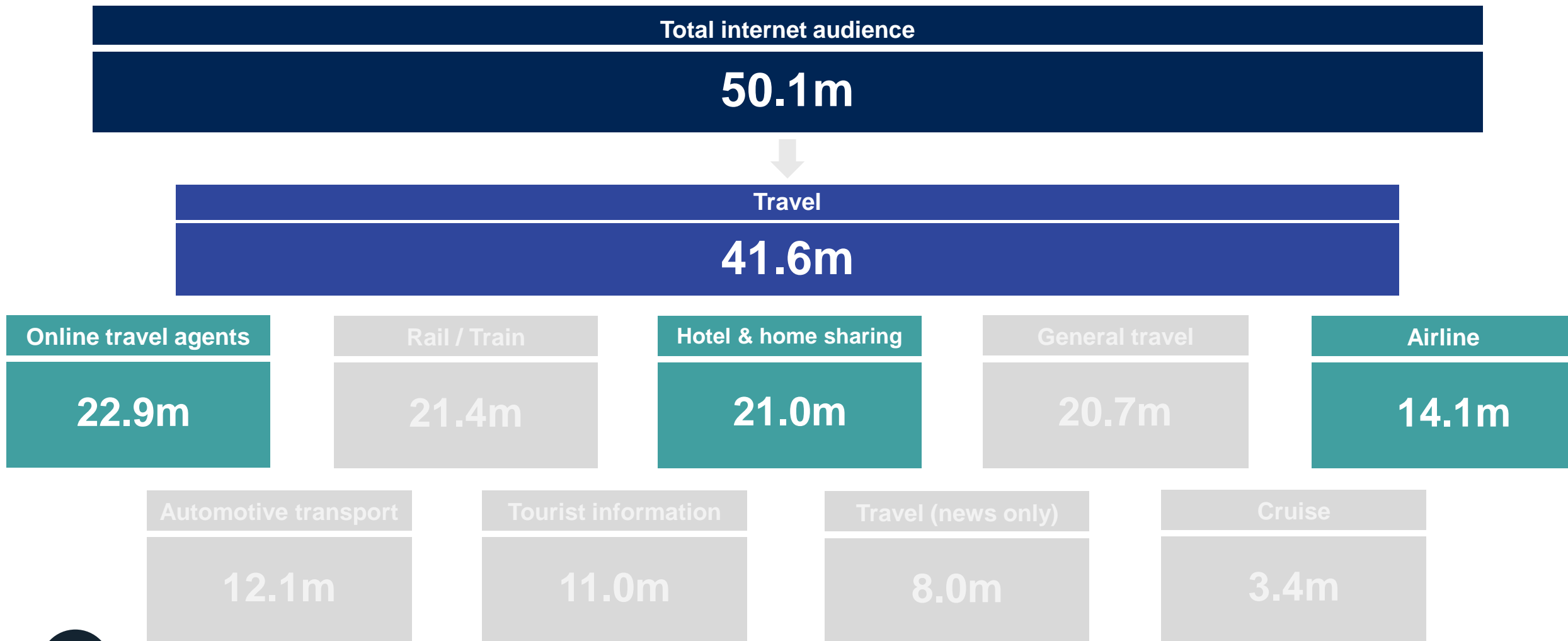


ΠΩΛΕΙΤΑΙ
FOR SALE
Τηλ:6974787907

Travel brands reach almost 42 million visitors a month



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



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

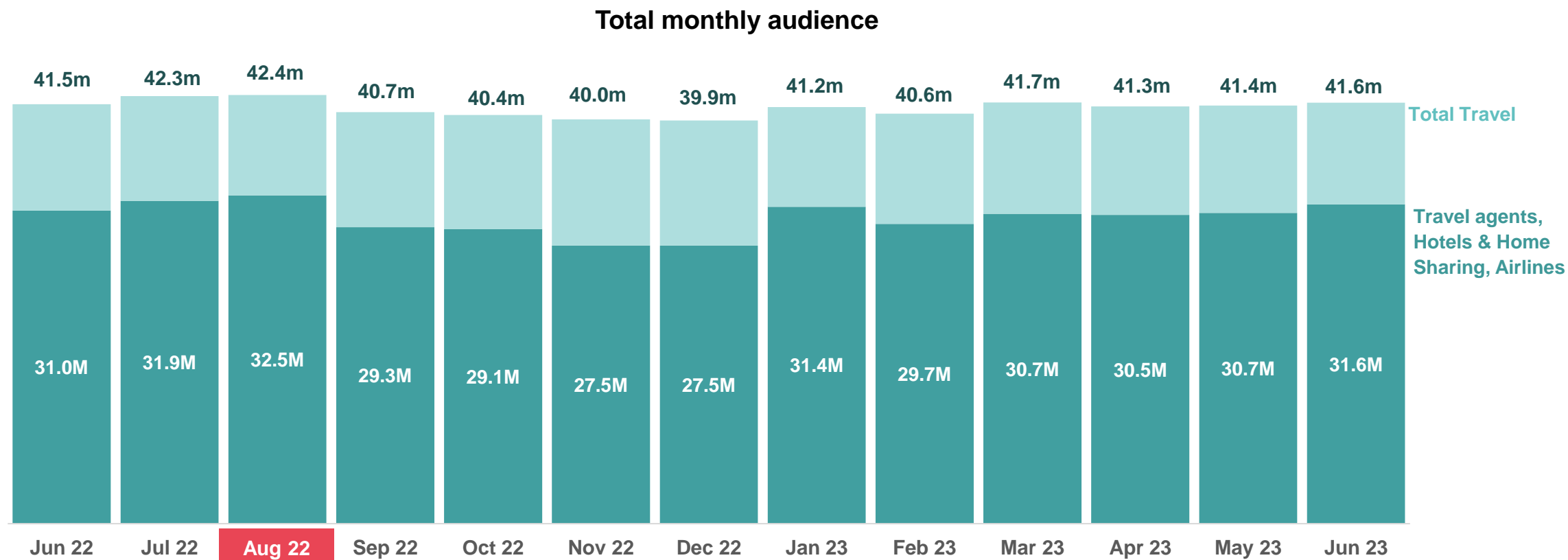


OPPORTUNITY SIZING

01



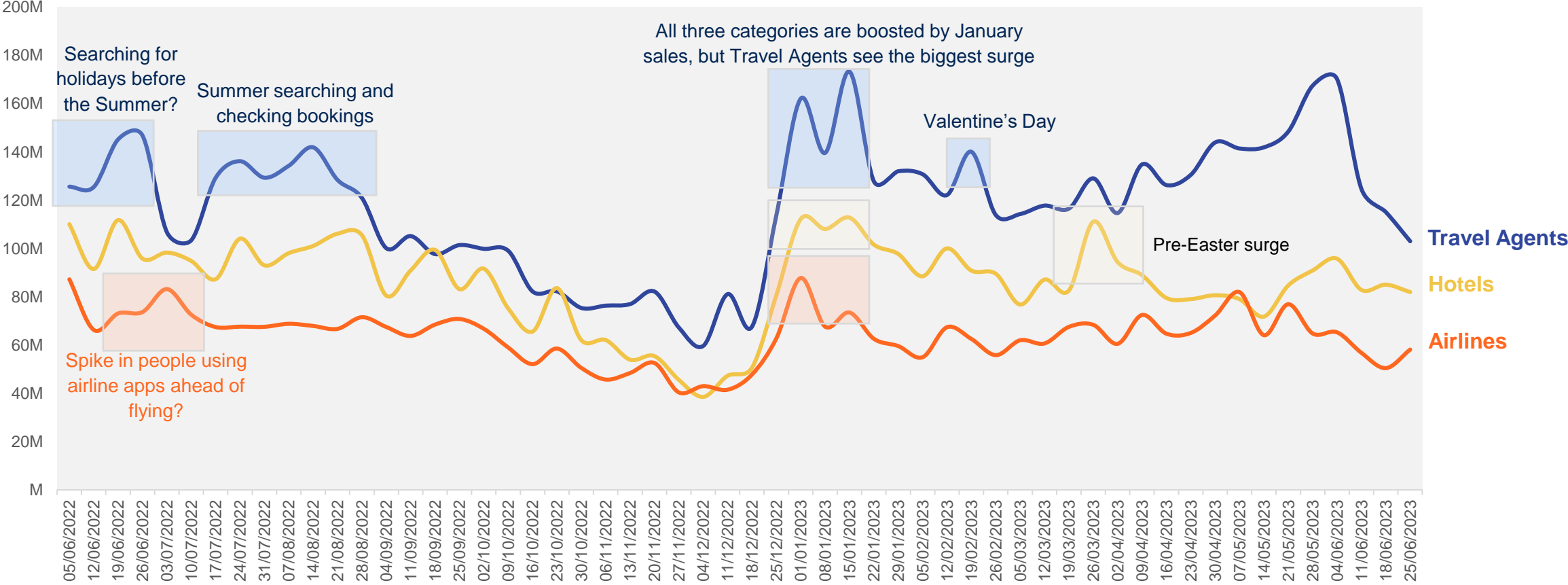
The audience across travel agents, hotels & home sharing and airlines peaked in August 2022



Engagement spikes in the January sales

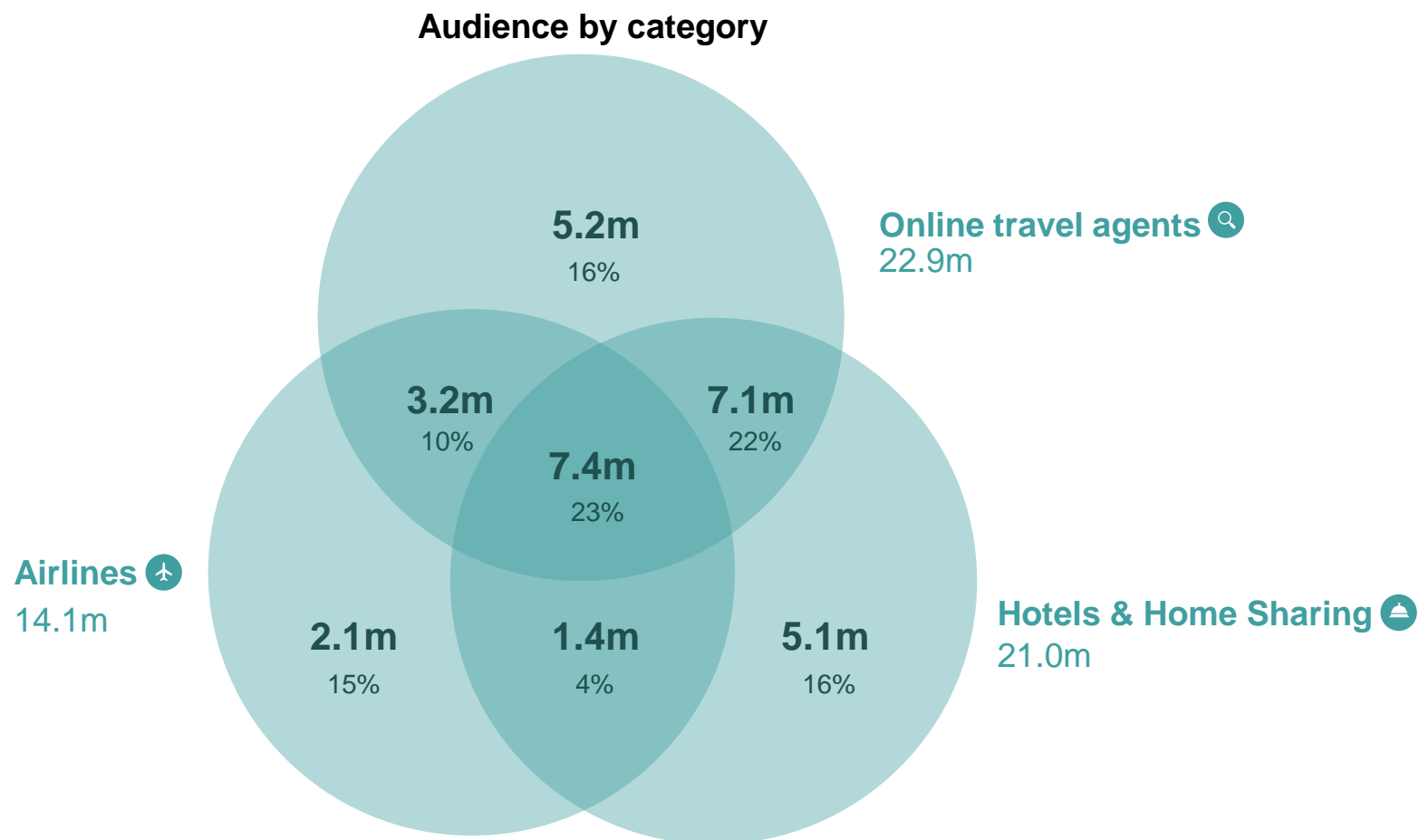
Travel agents see the biggest peak of any category in January – even relative to their larger audience. How can hotels and airlines cultivate similar peaks among their visitors?

Weekly change in time spent on websites and apps



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?

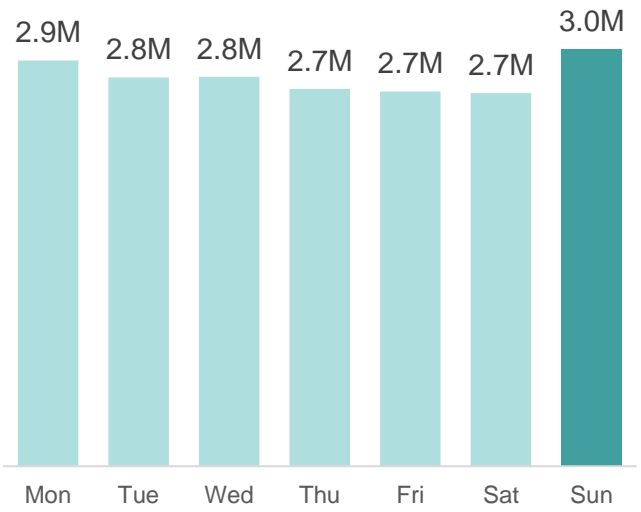


Sunday is key for agents and hotels, while airlines peak on Mondays

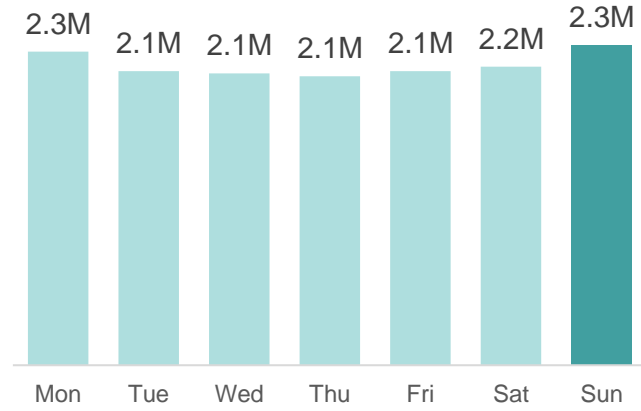
Saturdays have some of the lowest audiences: Are visitors looking to shake that back-to-work feeling? Does the day of the week change the context for communications and therefore messaging?

Average daily audience by day of the week

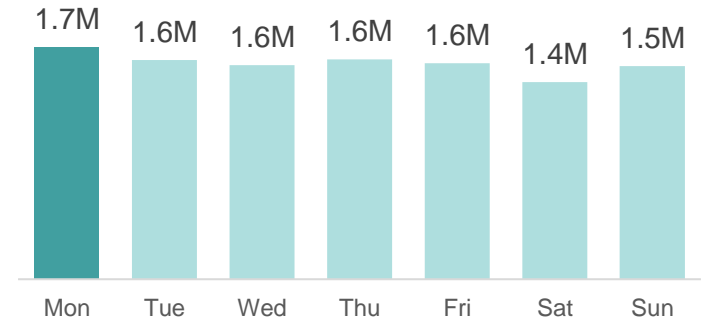
Online travel agents 🔍



Hotels & Home Sharing 🏠



Airlines ✈️



Visitors spend almost 40% longer on online travel agents

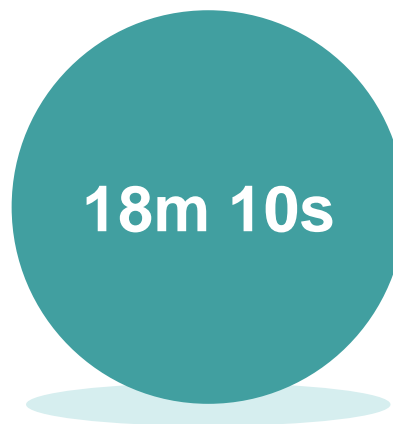
Does the variety on offer on travel agent sites mean visitors will naturally spend longer on them? Or should airlines and hotels look at engaging visitors for longer each month?

Average time spent visiting each month

Online travel agents 🔍



Hotels & Home Sharing 🏠



Airlines ✈️



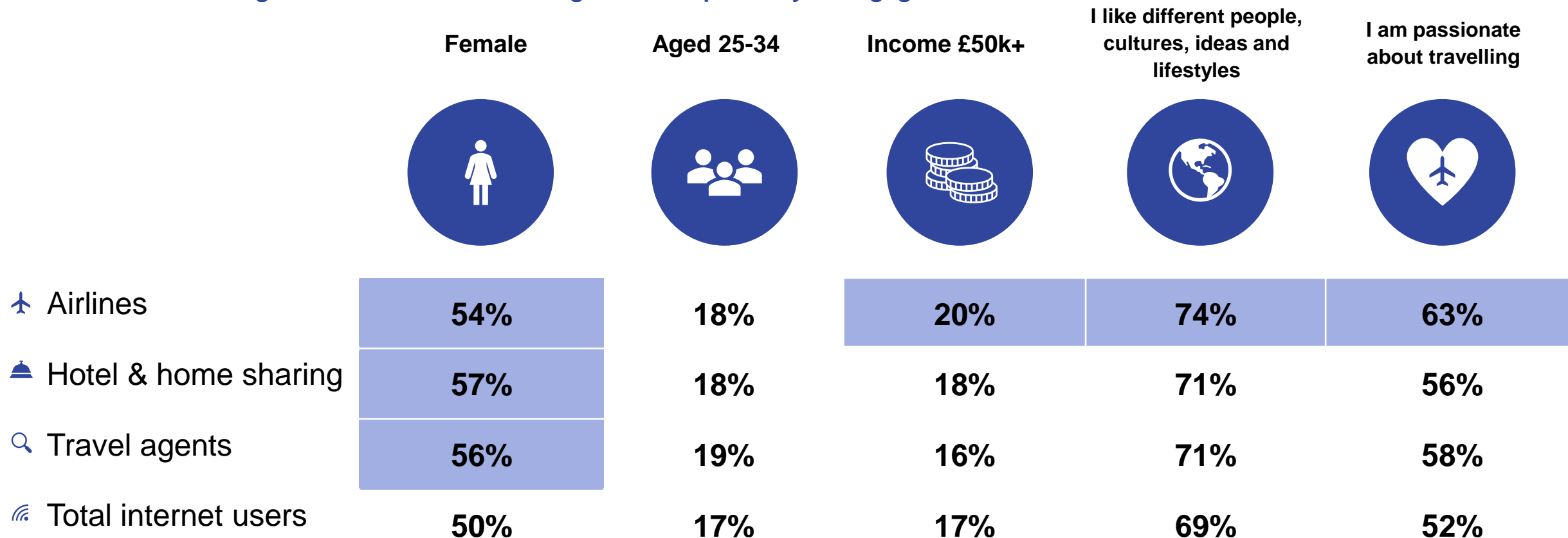
AUDIENCE PROFILE

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?



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 ✈️



...but Airbnb has the largest exclusive audience

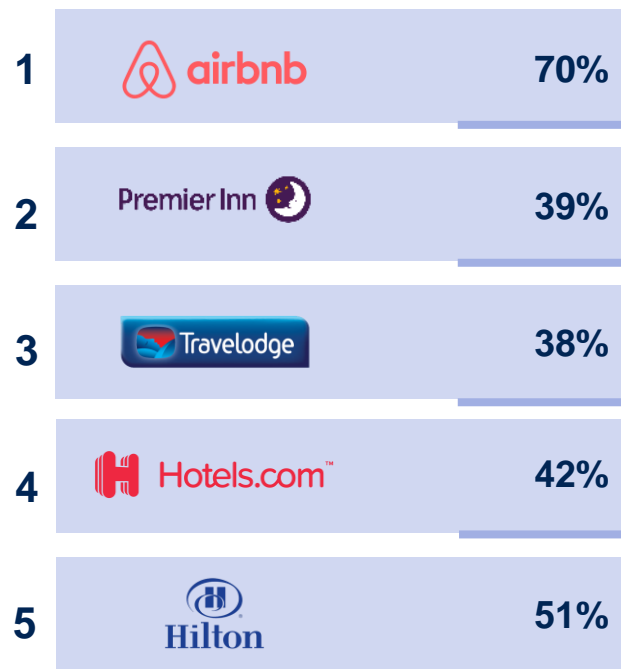
Airbnb's original proposition has given it a large exclusive audience. Clear propositions and positioning from Hilton in hotels and Jet2 in airlines mean that, despite their size, they have large exclusive audiences too. How can you find your position in a crowded market?

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

Online travel agents 🔍



Hotels & Home Sharing 🏠



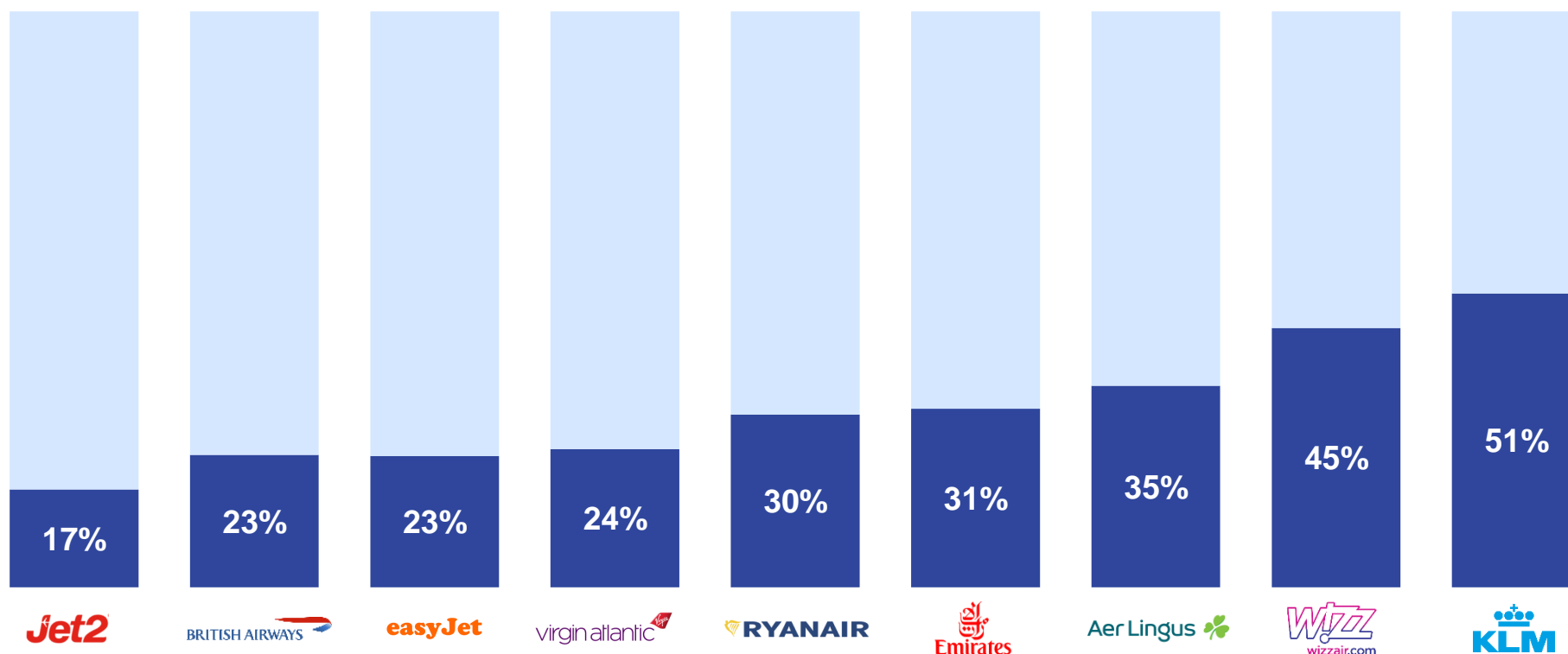
Airlines ✈️



Jet2 also has the fewest visitors going to Skyscanner

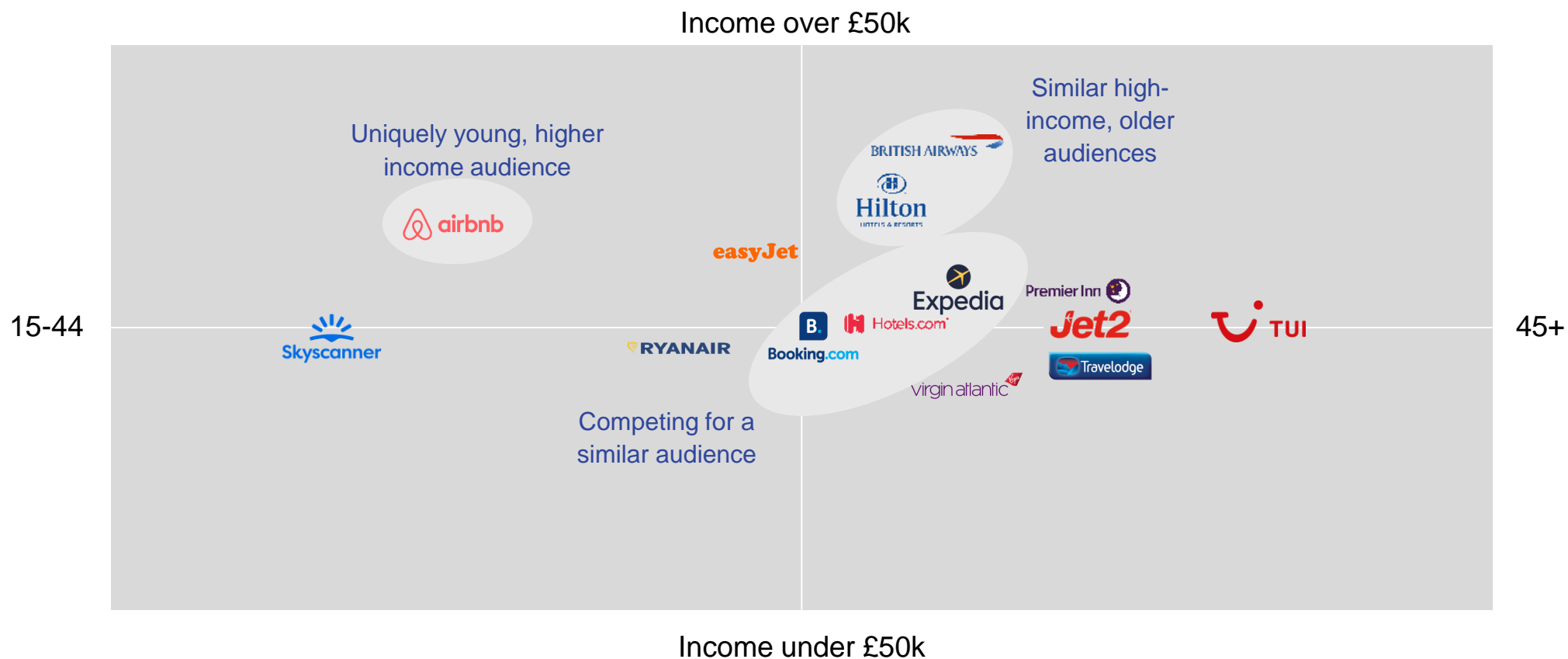
We see a similar picture for Jet2 if we look specifically at the share of visitors using Skyscanner. KLM visitors are the most likely to visit Skyscanner, while Emirates' visitors are more likely to visit Skyscanner compared to premium competitors like BA and Virgin

Percentage of visitors who also visit Skyscanner each month



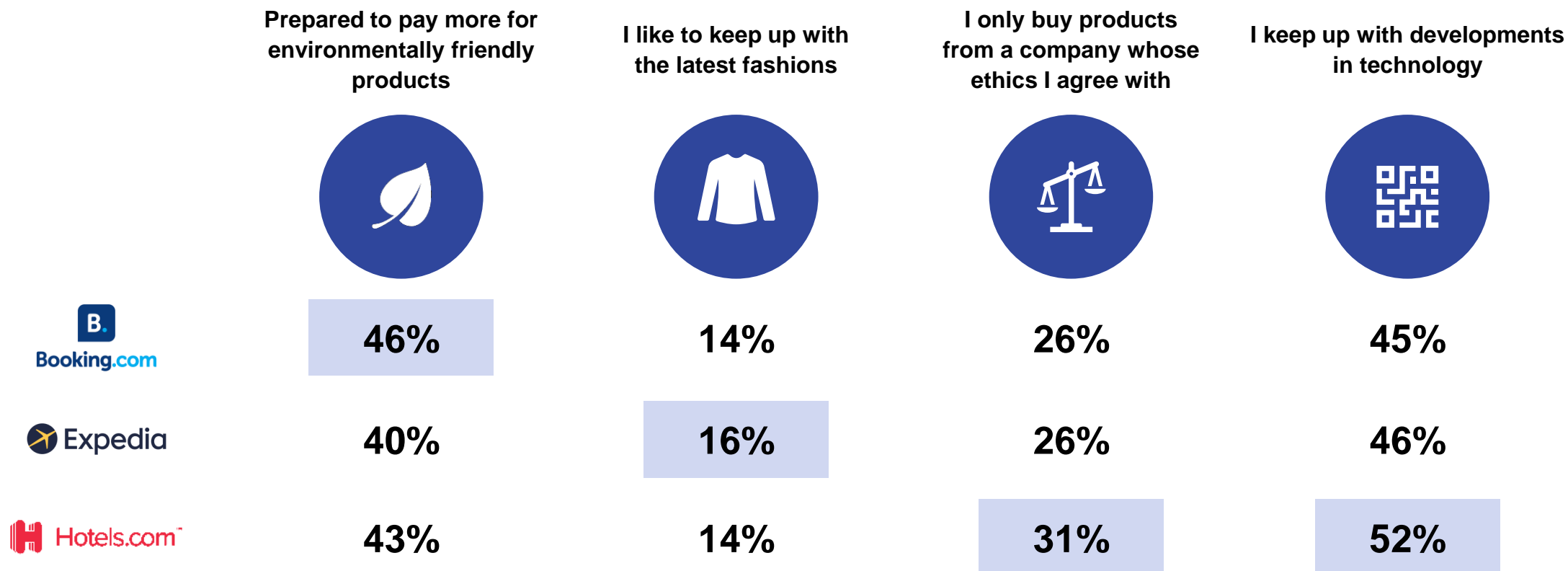
The top travel brands attract a higher income, older audience

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



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



ADVERTISING & PARTNERSHIPS

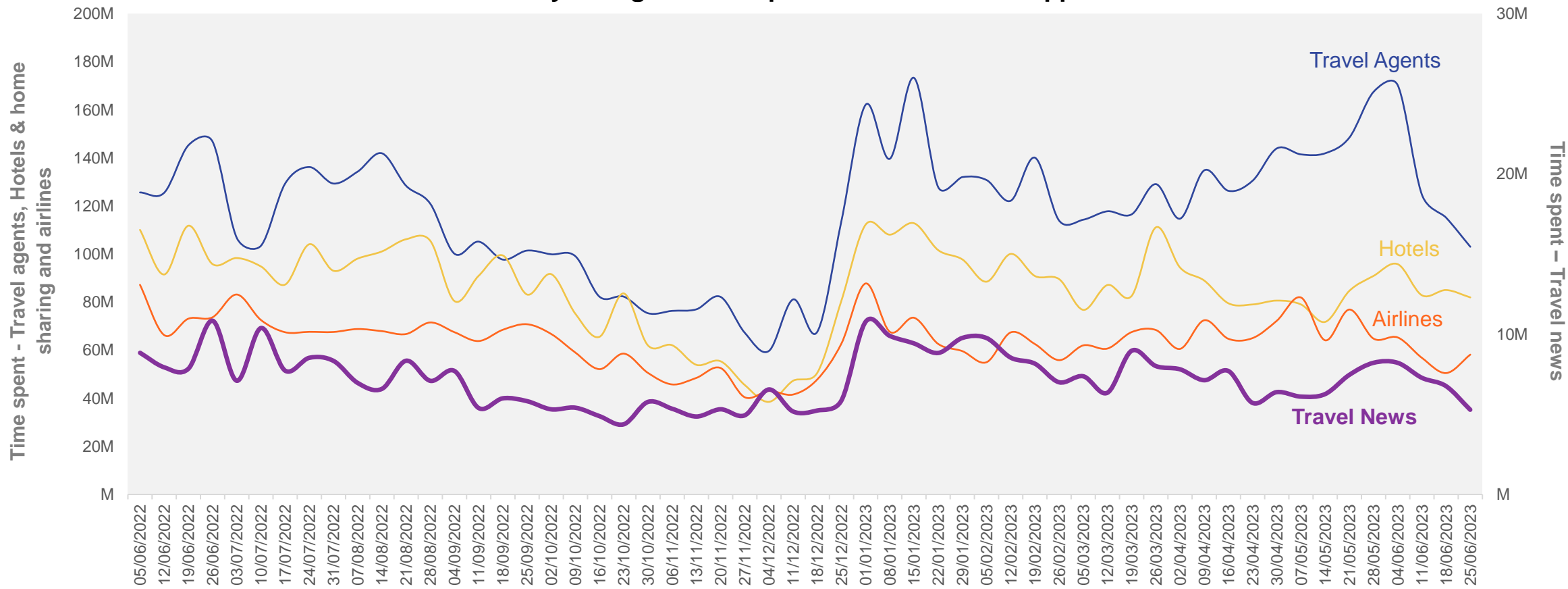
03



The trend for travel news follows wider travel browsing

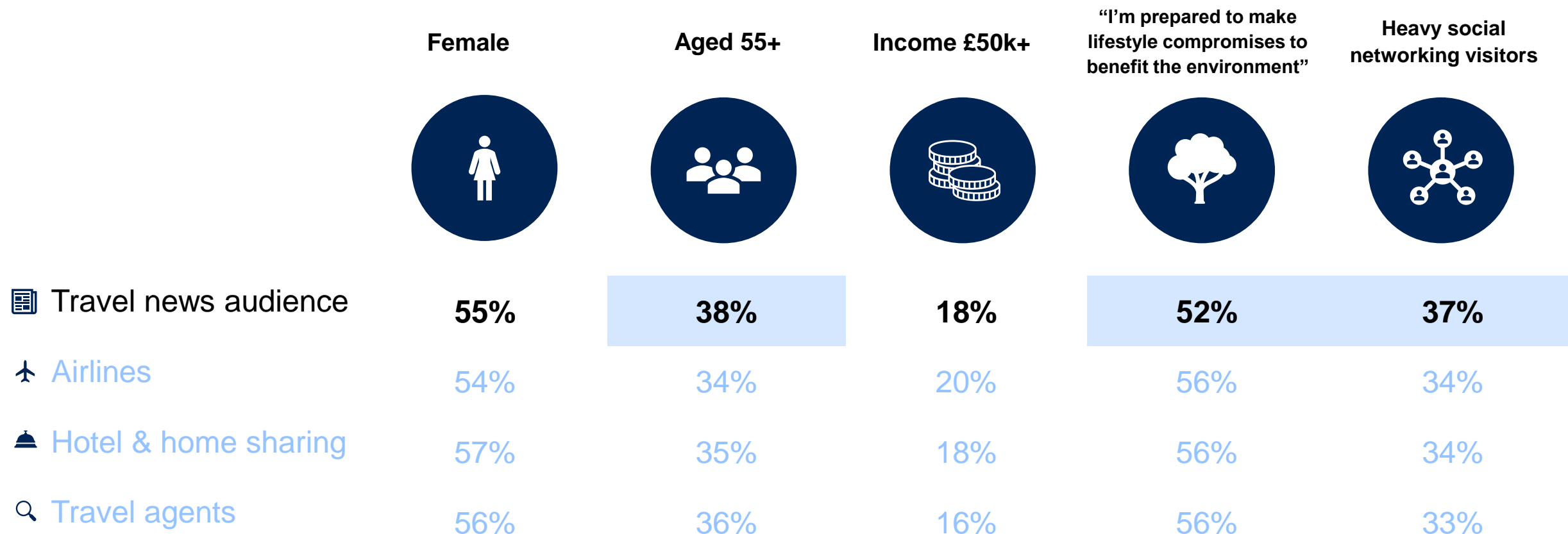
While less time is spent with travel news overall, the trend is broadly similar to travel shopping. This is an audience interested in travel that is engaged at key sales periods throughout the year. Are you targeting this primed audience?

Weekly change in time spent on websites and apps



Travel news visitors also skew female, but are older

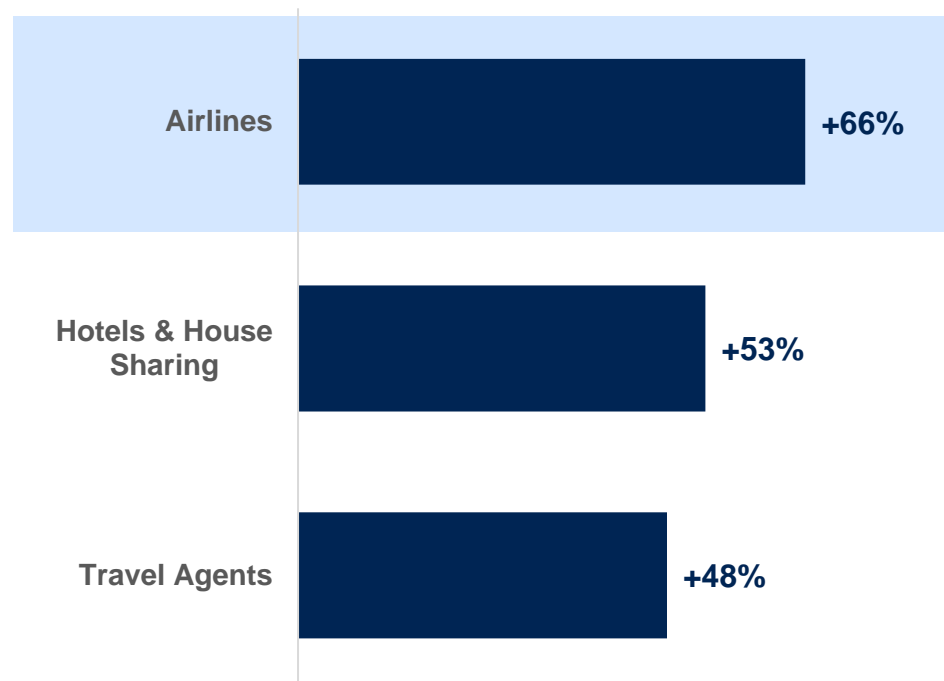
There are many similarities between the news audience and other categories in data. But News visitors skew older and are less engaged with the environment, which may influence the best messaging for them.



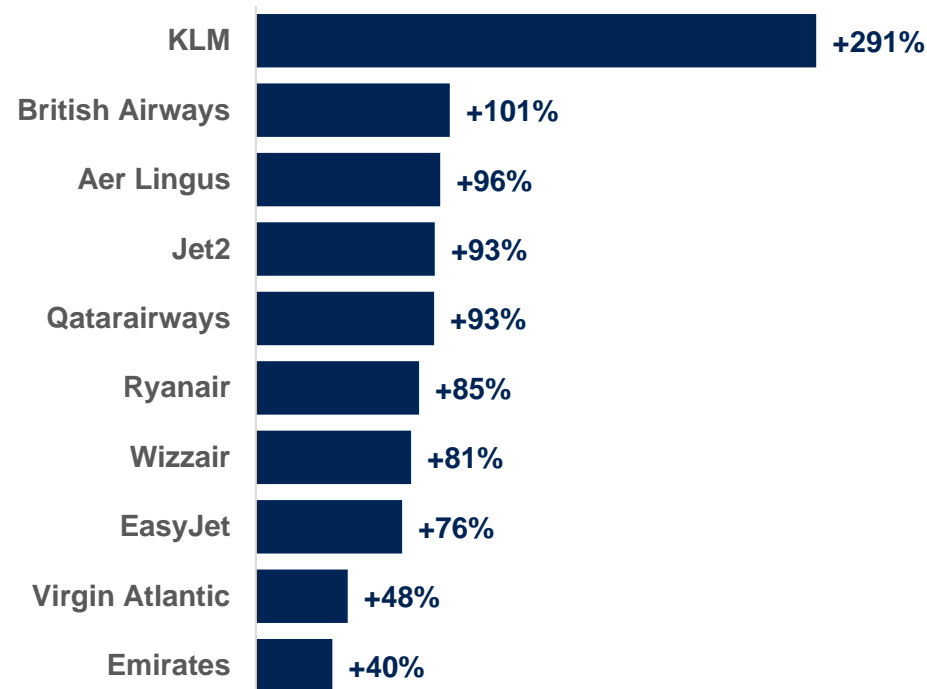
Travel news visitors are an intentional audience: they are much more likely to visit travel retail sites

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



% likelihood to visit vs total internet audience



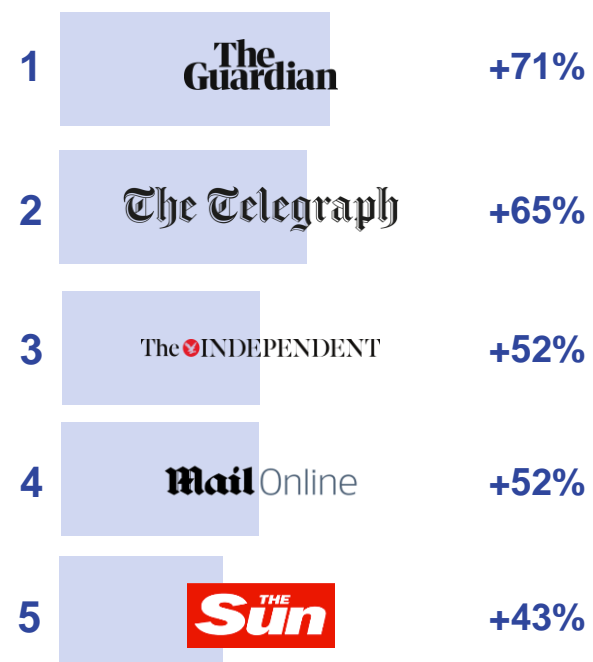
Visitors to each of the top five travel news sites are significantly more likely to visit the biggest travel brands

Finding the right travel news partner for your brand = reaching the right customers, at the right time, in the right context

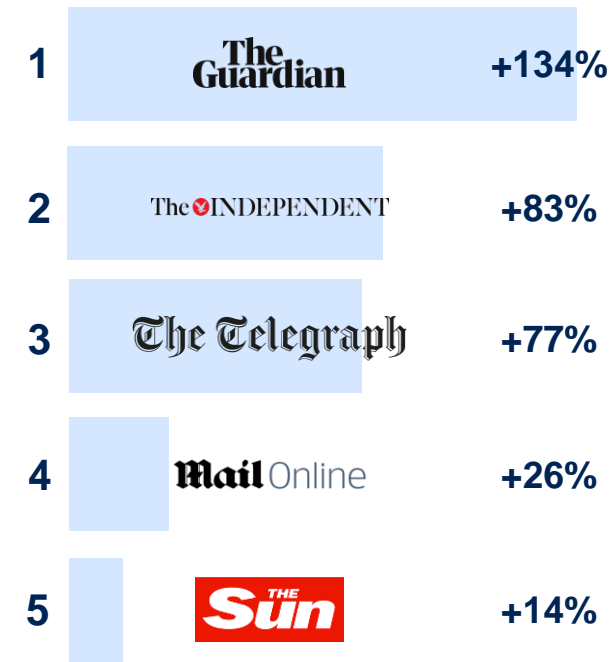
Top 5 Travel News sites / sections by audience



Likelihood to visit [Booking.com](https://www.booking.com) vs total internet audience



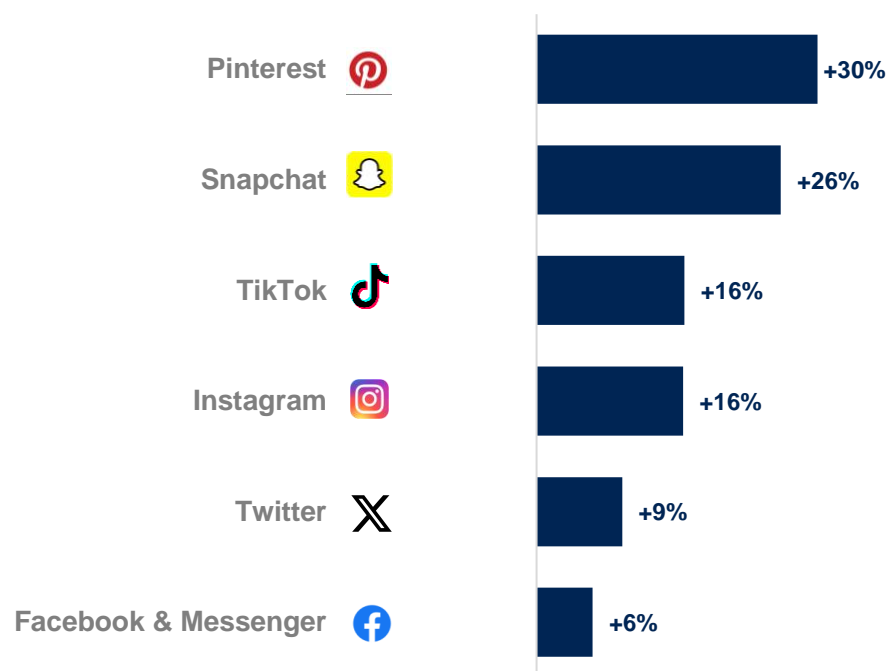
Likelihood to visit [Airbnb](https://www.airbnb.com) vs total internet audience



Social media offers another effective means for reaching travel visitors

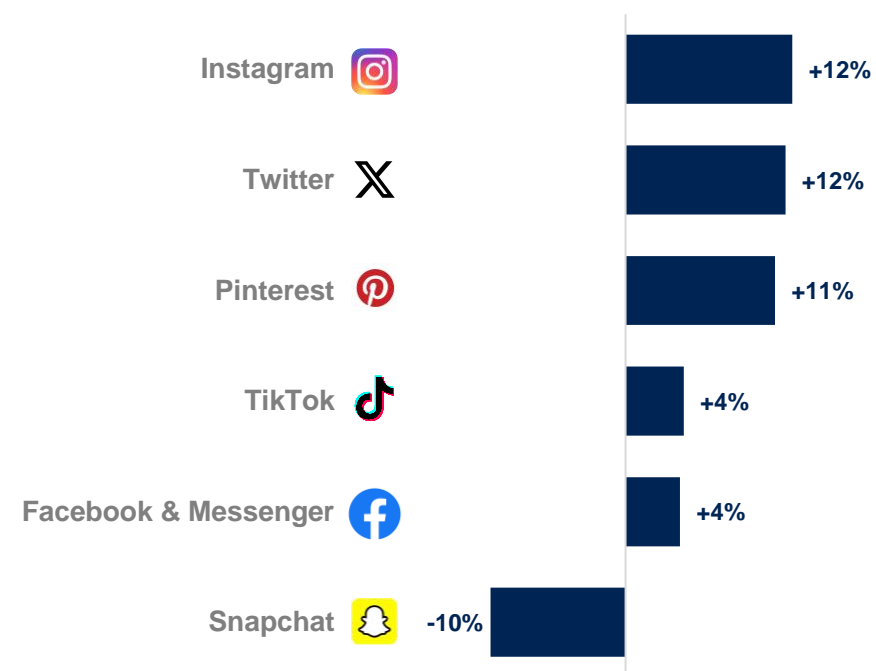
You can match your brand to the right social media platforms for you: EasyJet visitors are big users of Pinterest and Snapchat, while British Airways visitors are more likely to be on Instagram and Twitter. Where should your brands be advertising?

Likelihood to visit vs all internet users



easyJet

Likelihood to visit vs all internet users

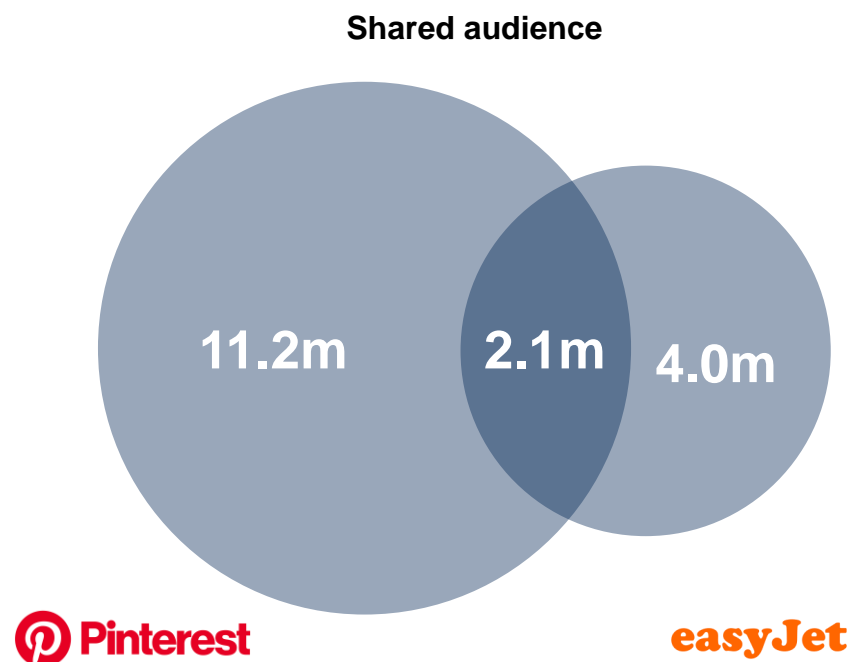


BRITISH AIRWAYS



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?












	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% ▲

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

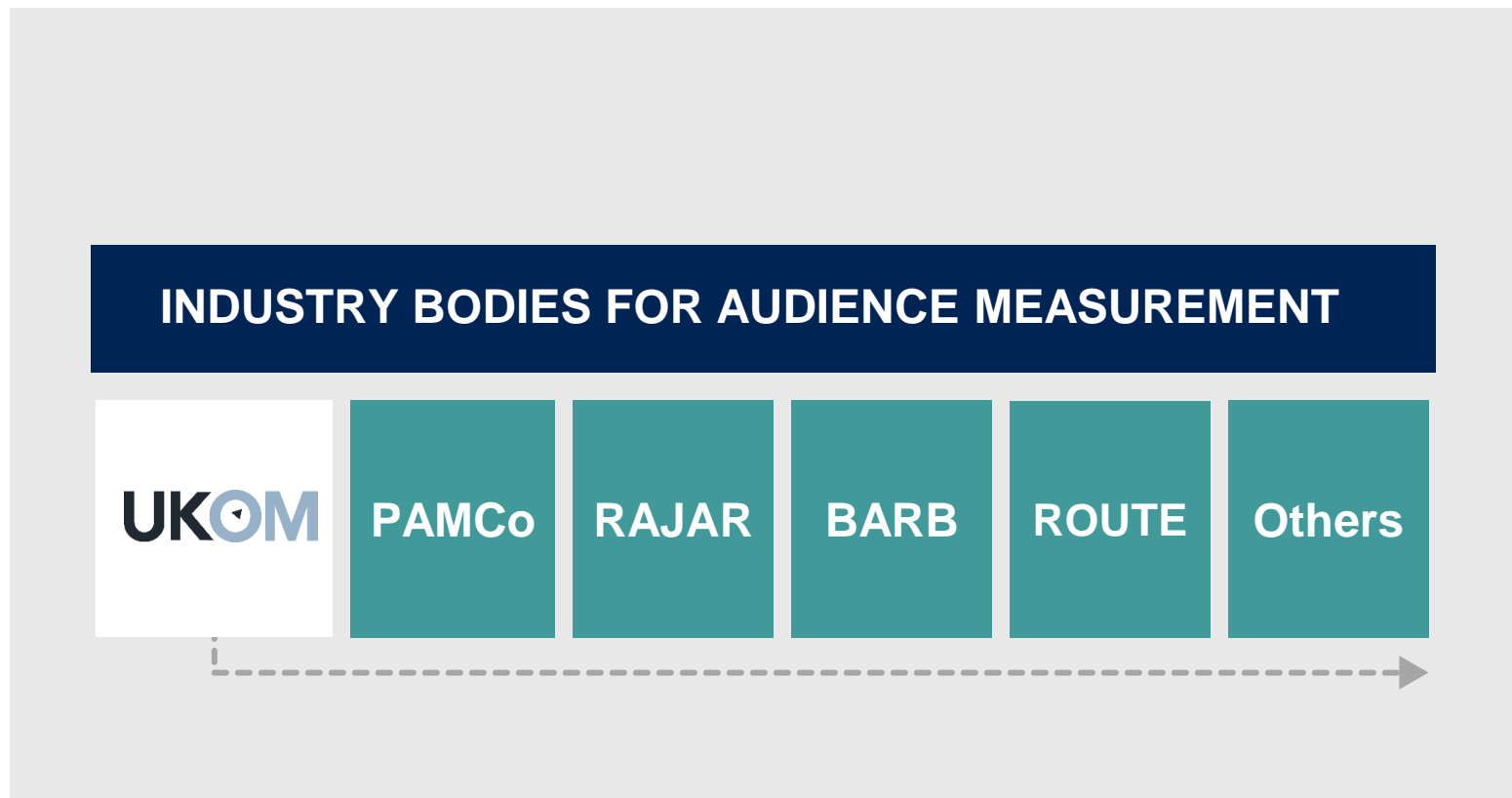
Online is complex

**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



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



**Build audiences
to deliver on
KPIs**



**Market
understanding
and trends**



**Brand and
competitor
engagement**

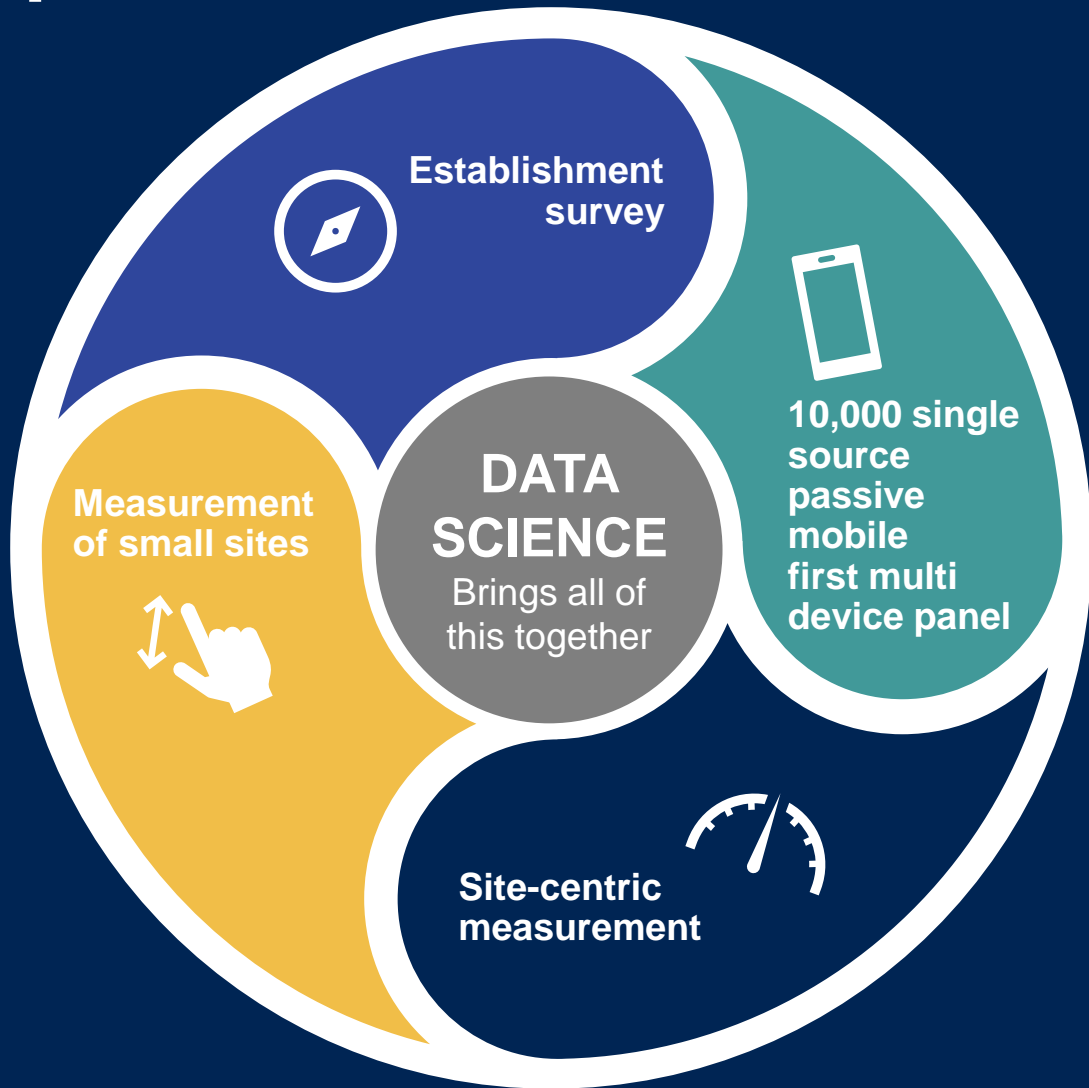


**Where
audiences go
and what
content they
consume**



**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.