



KINESSO

Travel & Tourism Sector Report

UNITED KINGDOM, SEPTEMBER 2024

We are KINESSO

Allow us to introduce ourselves.

We are KINESSO, IPG Mediabrands' award-winning, tech-driven performance marketing agency.

Amid rapid change in the performance marketing world, we give brands the clarity and confidence needed to take action

In this report, we'll provide an overview of performance intelligence across the travel & tourism sector, demonstrating which brands are winning when it comes to generating crucial visibility in search, attracting attention with biddable media and engaging audiences through quality content.

As the research shows, there's a massive opportunity for brands in this sector to optimise their performance marketing in a joined-up way to drive sustainable profitable growth.

About the report

This report is your snapshot of what's happening across digital channels in the UK travel and tourism industry, showcasing how brands are approaching digital, and demonstrating the size of the opportunity available.

We have focused on the three core elements that are the foundations of effective performance marketing:

Experience

How brands are removing friction from the customer journey.

Media

How effective brands are at using media to direct attention.

Content

How effective brands are at engaging that attention with content.

Using a mix of proprietary technology, data sources and insight, we're going to reveal which brands are leading the way in the market, explain why those brands are performing as well as they are, and showcase where the golden opportunities are for competitors.



We've identified a vertical where some brands are dominating overall search visibility, despite spending a fraction of what many of their competitors are spending on overall marketing budgets.

We've also uncovered significant gaps in digital proficiency that, if addressed, could have a sizeable impact on ROI.

Overview

Analysing the core performance marketing channels, we've reviewed the leading brands in the travel & tourism market to understand how and why these brands are dominating the market.

Using illustrative examples, we'll deliver insights to help increase performance across these channels, to help you drive **new leads to your brand**.

Topics covered

Upfront Industry
Insights

Delving
into Experience

Assessing
the Media

Reviewing
the Content

A circular infographic with a pink border and a white background. The number '66%' is displayed in large white font. The background of the circle shows a person's hands typing on a laptop keyboard.

66%

UK travellers prefer a beach/resort holiday

A circular infographic with a pink border and a white background. The number '45%' is displayed in large white font. The background of the circle shows a person's hands holding a smartphone.

45%

Competitor average web traffic through organic search

A circular infographic with a pink border and a white background. The number '77%' is displayed in large white font. The background of the circle shows a person's face looking at a laptop screen.

77%

Competitor media spend invested into Social & TV ads

A circular infographic with a pink border and a white background. The number '84%' is displayed in large white font. The background of the circle shows a person's face looking at a laptop screen.

84%

UK travellers prefer to book their holidays online vs. in-store

Content

01

Upfront industry insights

- Market research
- Trending on social
- Social brand mentions
- Audience analysis
- Search opportunity
- Traffic analysis

02

Delving into Experience

- Organic search
- Website proficiency
- Tech SEO DXA
- User experience

03

Assessing the Media

- Paid search
- Media spend

04

Reviewing the Content

- Ad creative
- Web content relevancy
- Social account analysis

05

Key takeaways

SECTION 01

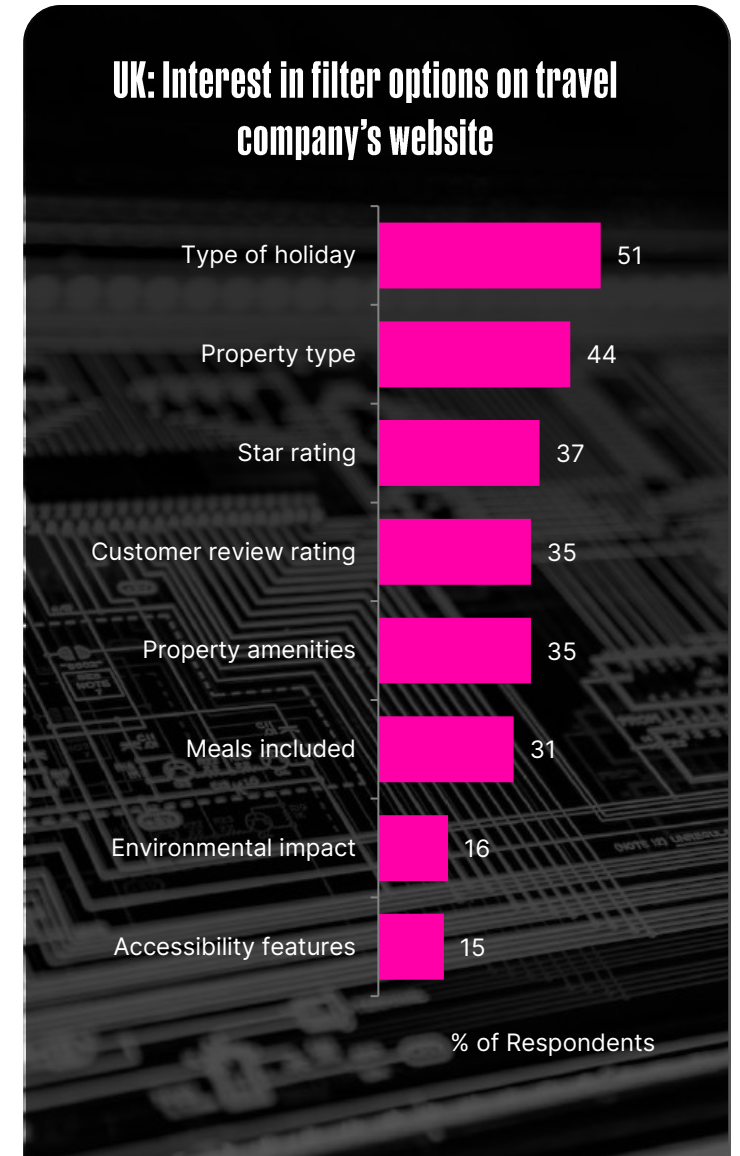
Upfront Industry Insights

Market Research

Market research into the travel & tourism industry helps set the scene on what is happening, using these insights we can be ahead of the curve when planning future marketing strategies.

TOP INSIGHTS ACROSS MARKET RESEARCH WERE:

1. Growth in UK travellers taking domestic holidays is **expected to rise by 7% vs. 2023**.
2. **84% of UK travellers say they prefer to book holidays online** as opposed to in-store, with the majority using this purchase channel for its ease. Further research shows us the importance of supporting your customer through planning and booking. This demand for ease and support holds the opportunity to build brand perception through your online user journey.
3. UK residents see type of holiday (e.g. beach, city break) as the key filter when they are browsing on travel company sites, ensuring your website is well optimised to make the user's journey effortless and enjoyable will help increase conversion rate.

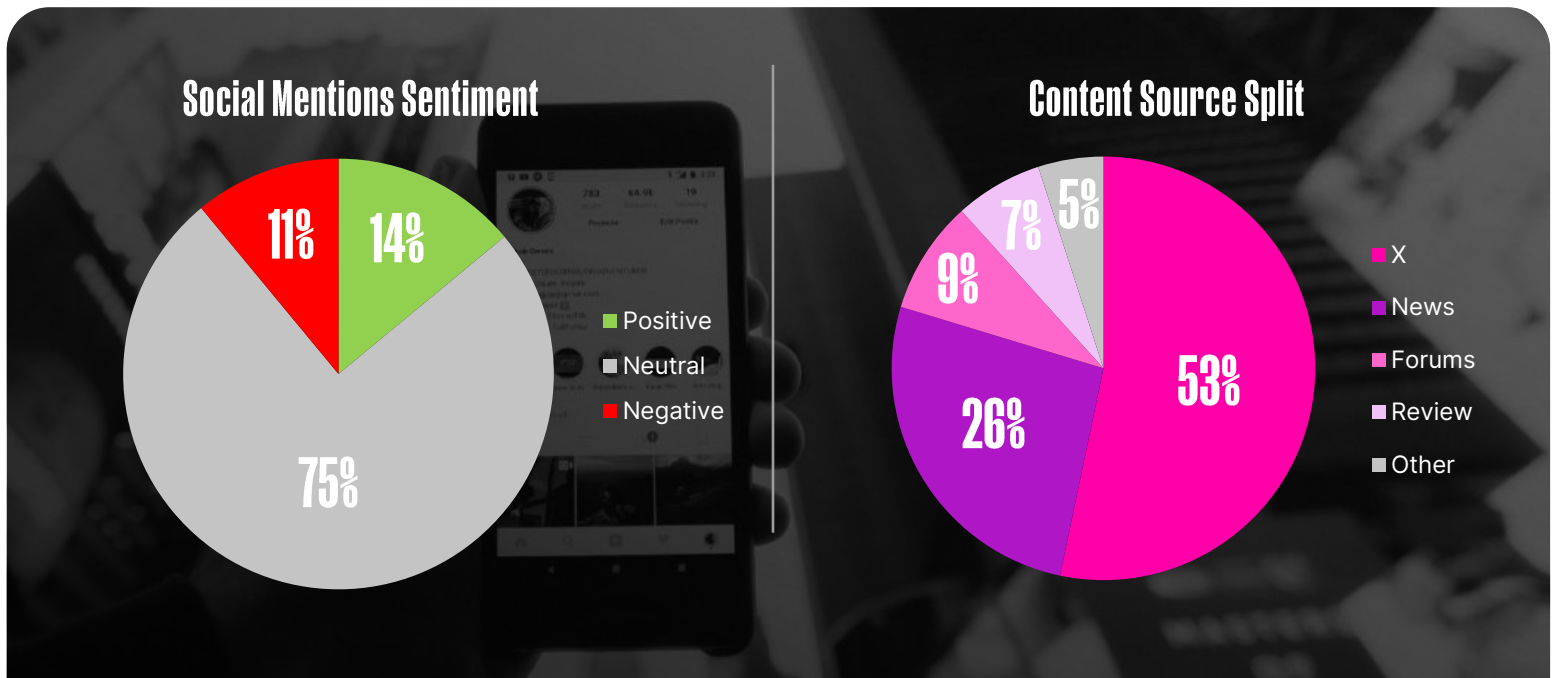
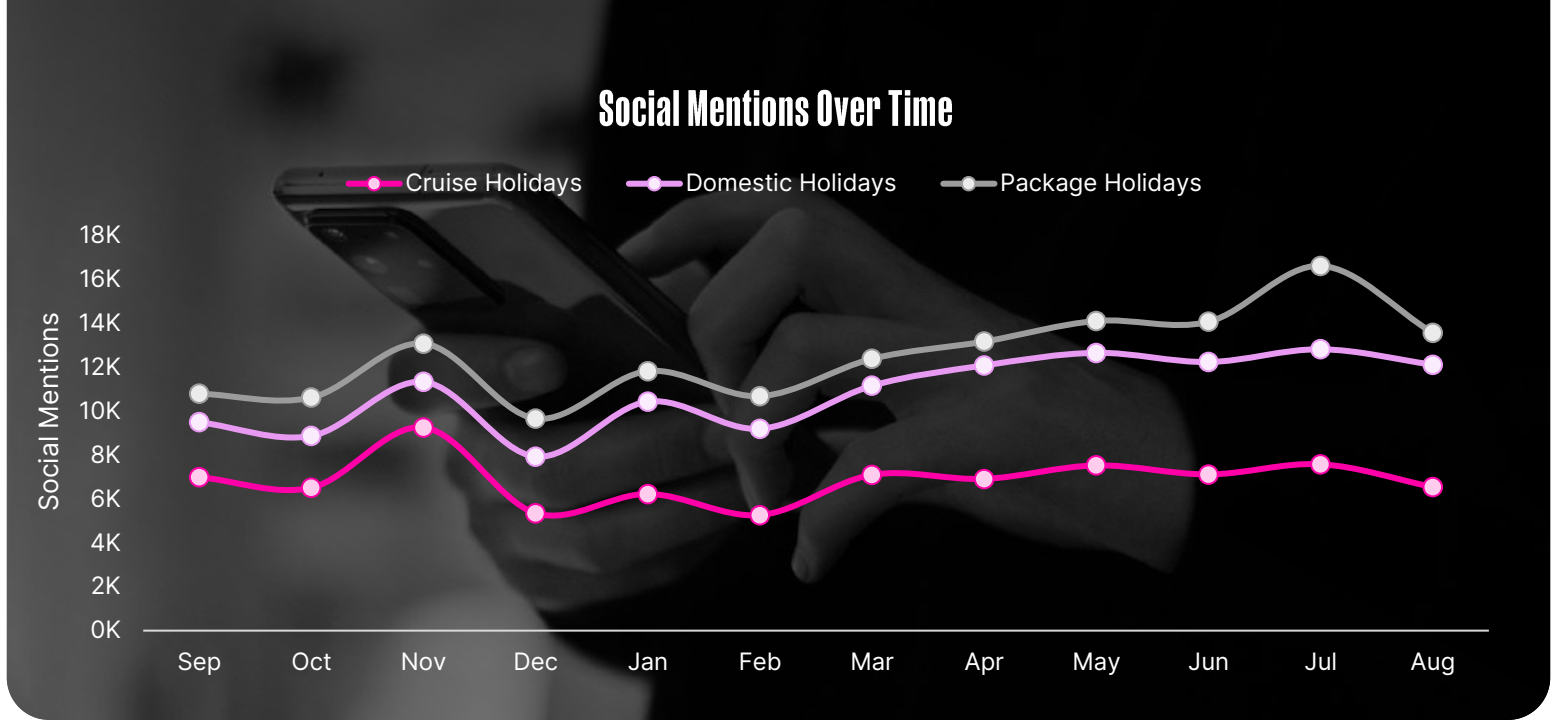


Trending on Social

Understanding what your customers are discussing online is key when building future marketing strategies. Using these insights, we can create topical content that speaks to your audience.

ACROSS OUR RESEARCH WE FOUND:

1. The fluctuations seen over time for Cruise, Domestic and Package Holidays are aligned with a spike seen in November, January and July. Understanding these key trends can help brands plan their content and social media investments strategically.
2. Over the year, **14%** of the total sentiment was positive across the three categories. Key topics contributing to this positive sentiment were offers/giveaways and holiday guides.
3. The **11%** negative sentiment was related to discussions of YoY price increases seen for holidays and the quality of customer service received from travel companies.

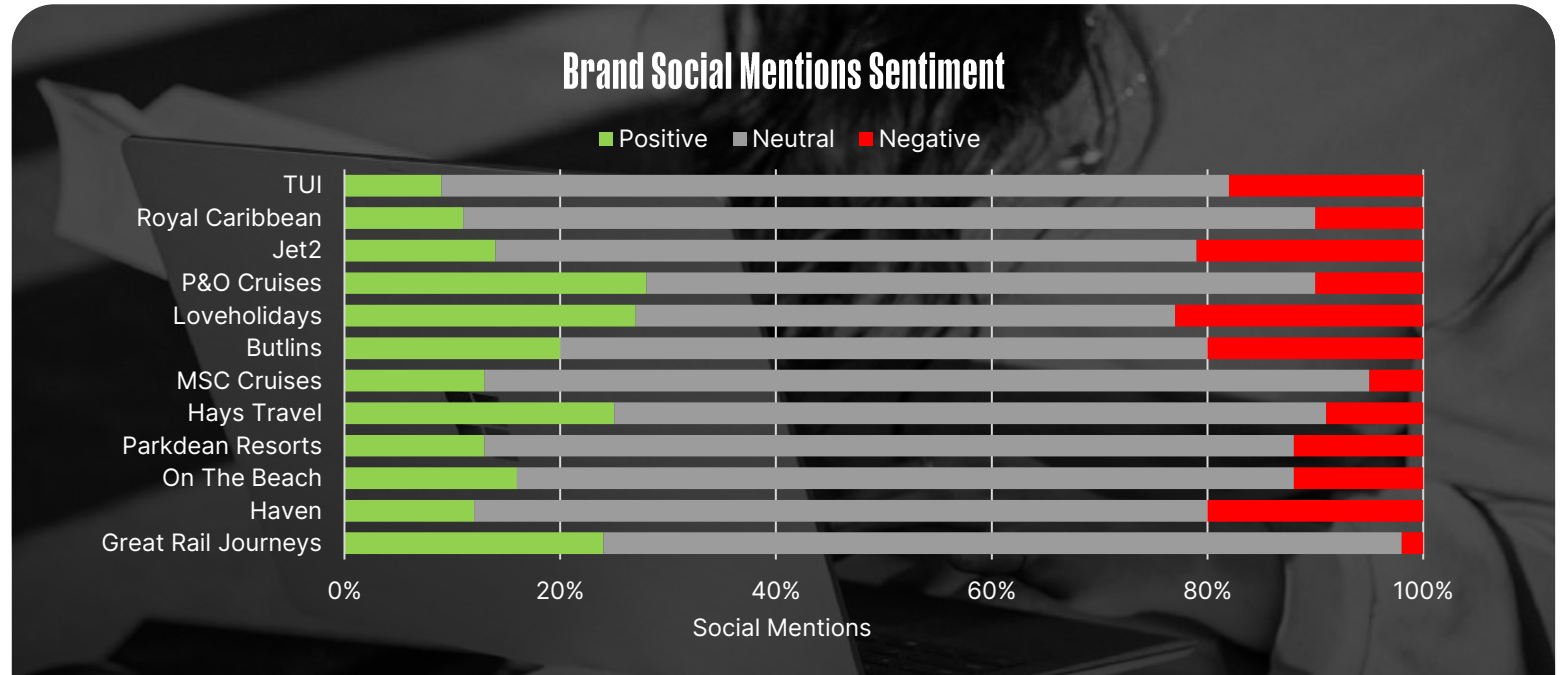
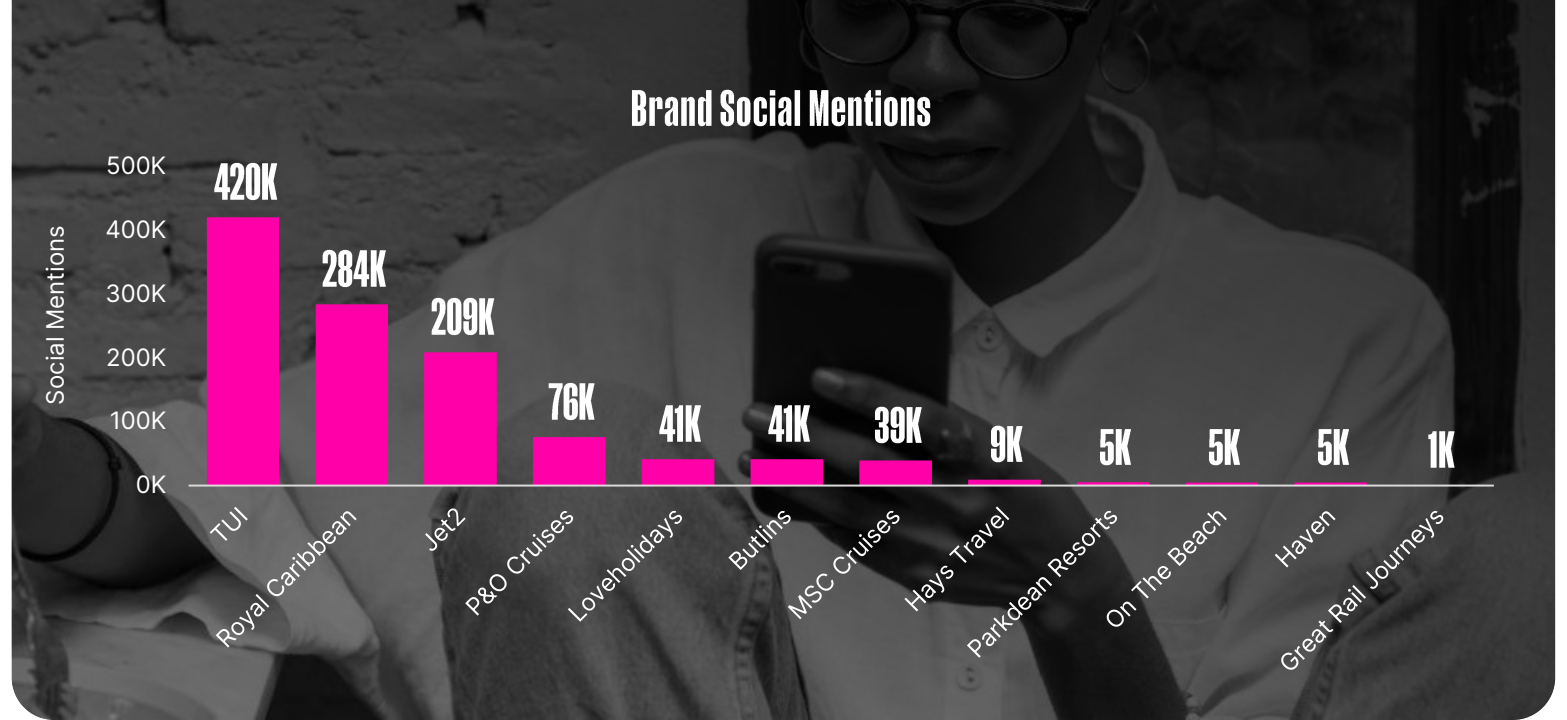


Social Brand Mentions

Using social networks to market your company; whether through social media marketing campaigns or being active across customer feedback is important when looking to build positive brand awareness.

THROUGH BRAND SOCIAL LISTENING WE FOUND:

1. TUI gained the highest share of social mentions (**37%**), followed by Royal Caribbean (**25%**) and Jet2 (**18%**). Mentions for TUI and Jet2 see a higher split of negative mentions around flight disruption.
2. Negative sentiment differed across brands with only Loveholidays, Butlins, Jet2 and Haven receiving **20%+**. This is largely made up of service-related complaints.
3. P&O Cruises received the most positive social mentions with **28%**, largely due to their sponsorship of the BAFTA Television Awards. Aside from the sponsorship, several mentions were also praising the service received from P&O Cruises.



Audience Analysis

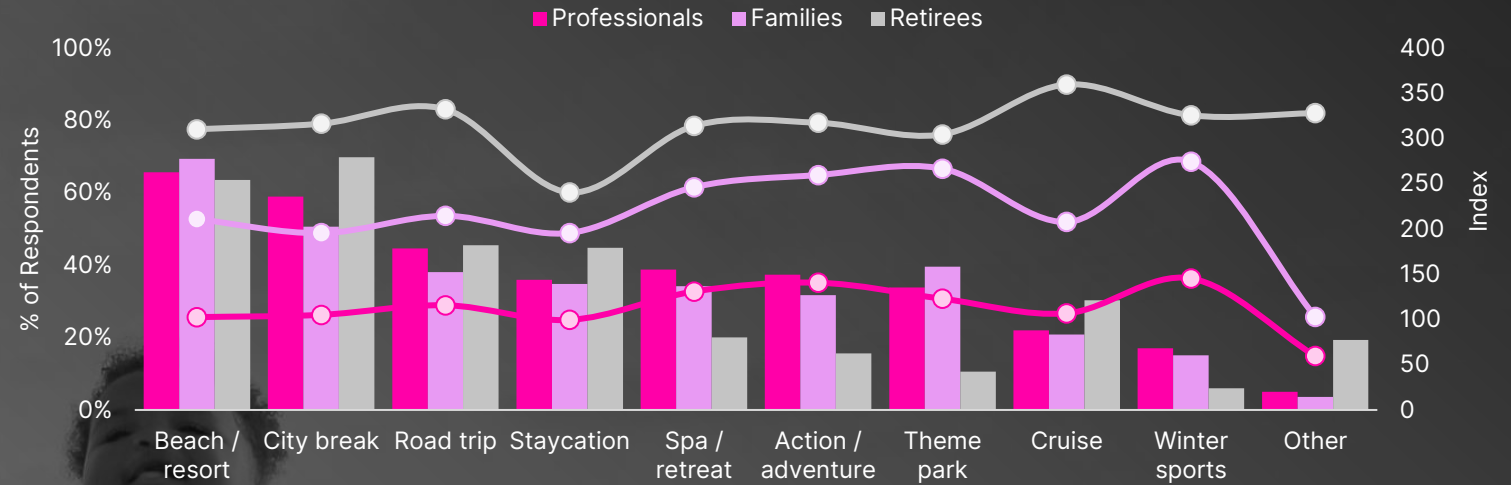
Using audience research we can look to understand the consumer; discovering their behaviours, views and habits. This research can help your brand target it's audience with ease.

By segmenting our audience into groups based on their lifestyle we can find nuances that will help you understand each group singularly.

TOP INSIGHTS ACROSS OUR AUDIENCES ARE:

1. Retirees often discover brands through search engines and use these platforms to conduct product research. They favour brands that offer great customer service and are responsive to their feedback.
2. Professionals are adventurous and they support brands that offer rewards and listen to their feedback.
3. Families are more price savvy, often spending time searching for the best deals on the market via social networks. They tend to discover brands through social media and are regular users on Instagram.

Holiday Preference



Professionals

BRAND RELATIONSHIP



Brand Discovery

Ads seen on Social Media
30% | 121i



Brand Actions

Listen to feedback
49% | 94i



Brand Advocacy

Rewards (e.g. discounts)
46% | 99i

ONLINE BEHAVIOUR



Product Research

Social networks
39% | 127i



Describe Me Statements

Adventurous
42% | 130i



Most Used Social Media

Instagram
47% | 158i

Families

BRAND RELATIONSHIP



Brand Discovery

Ads seen on Social Media
27% | 108i



Brand Actions

Make you feel valued
43% | 97i



Brand Advocacy

High quality products
43% | 96i

ONLINE BEHAVIOUR



Product Research

Social networks
38% | 124i



Describe Me Statements

Research for the best deals
50% | 93i



Most Used Social Media

Instagram
30% | 102i

Retirees

BRAND RELATIONSHIP



Brand Discovery

Search engines
50% | 131i



Brand Actions

Listen to feedback
65% | 125i



Brand Advocacy

Great customer service
64% | 156i

ONLINE BEHAVIOUR



Product Research

Search engines
71% | 130i



Describe Me Statements

Uses loyalty programs
75% | 135i



Most Used Social Media

Facebook
44% | 112i

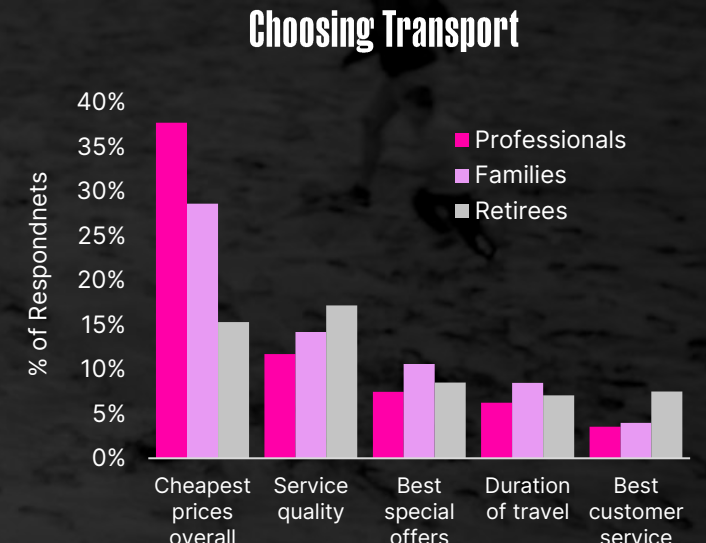
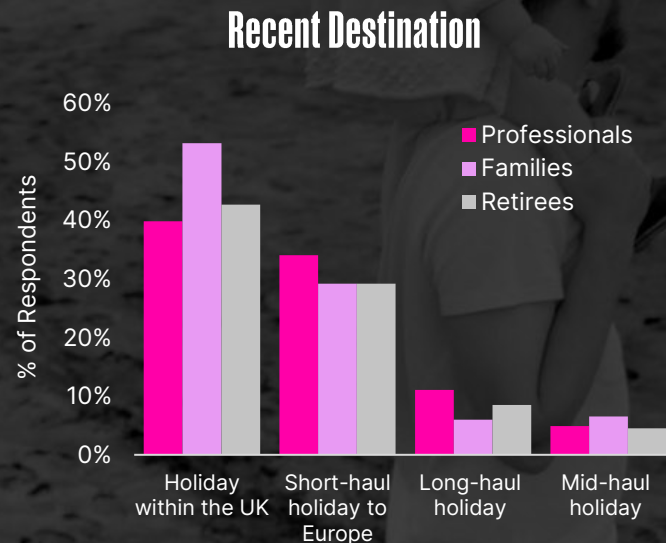
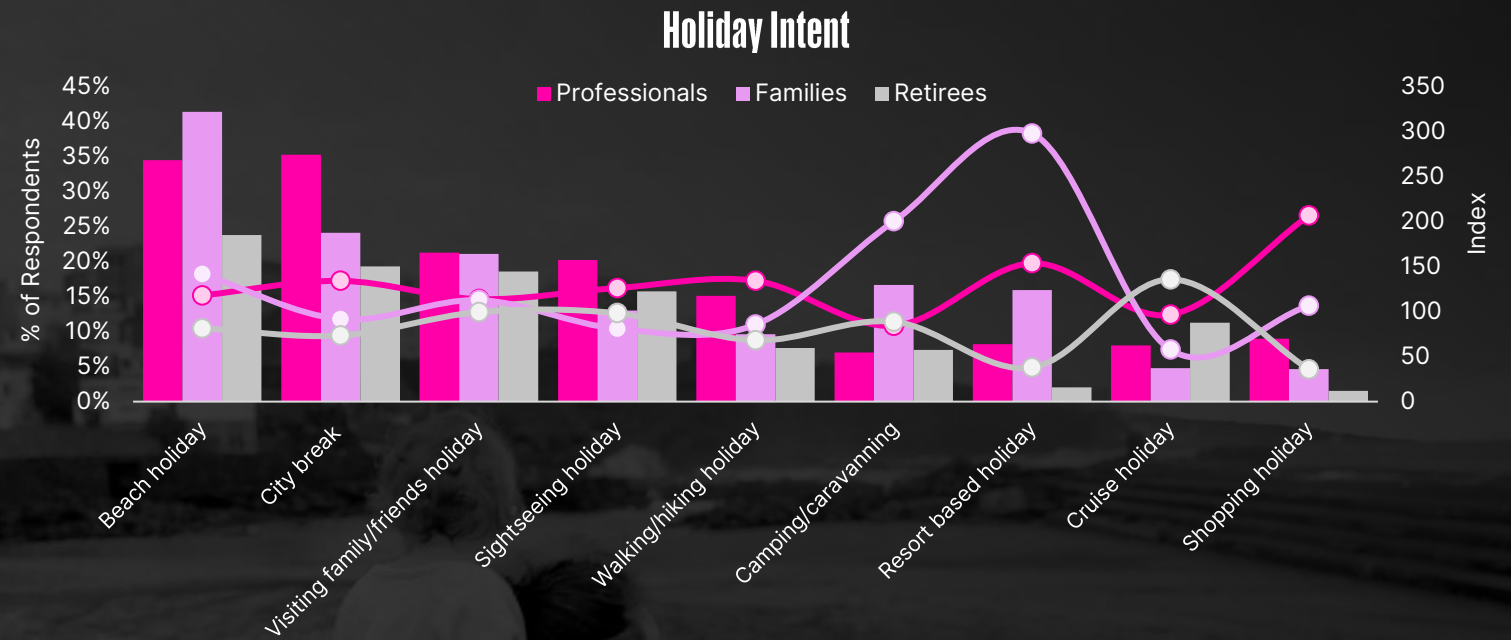
Audience Analysis

Deeper analysis into audience groups will allow us to look at the behaviours and habits of consumers when booking their holidays.

By looking into specific travel questions across our segmented audiences, we can further analyse their travel behaviours.

TOP INSIGHTS ACROSS OUR AUDIENCES ARE:

1. Holiday intention differs by audience group, with professionals looking for a mixture of holiday activities, whereas families tend to opt for beach and resort holidays and retirees over-index for cruises.
2. Recent destinations demonstrates the recent demand for holidays in the UK and short-haul holidays to Europe.
3. Outside of cheap prices, service quality is important for all audiences. This insight into motivation emphasizes the importance of trust between the consumer and provider.

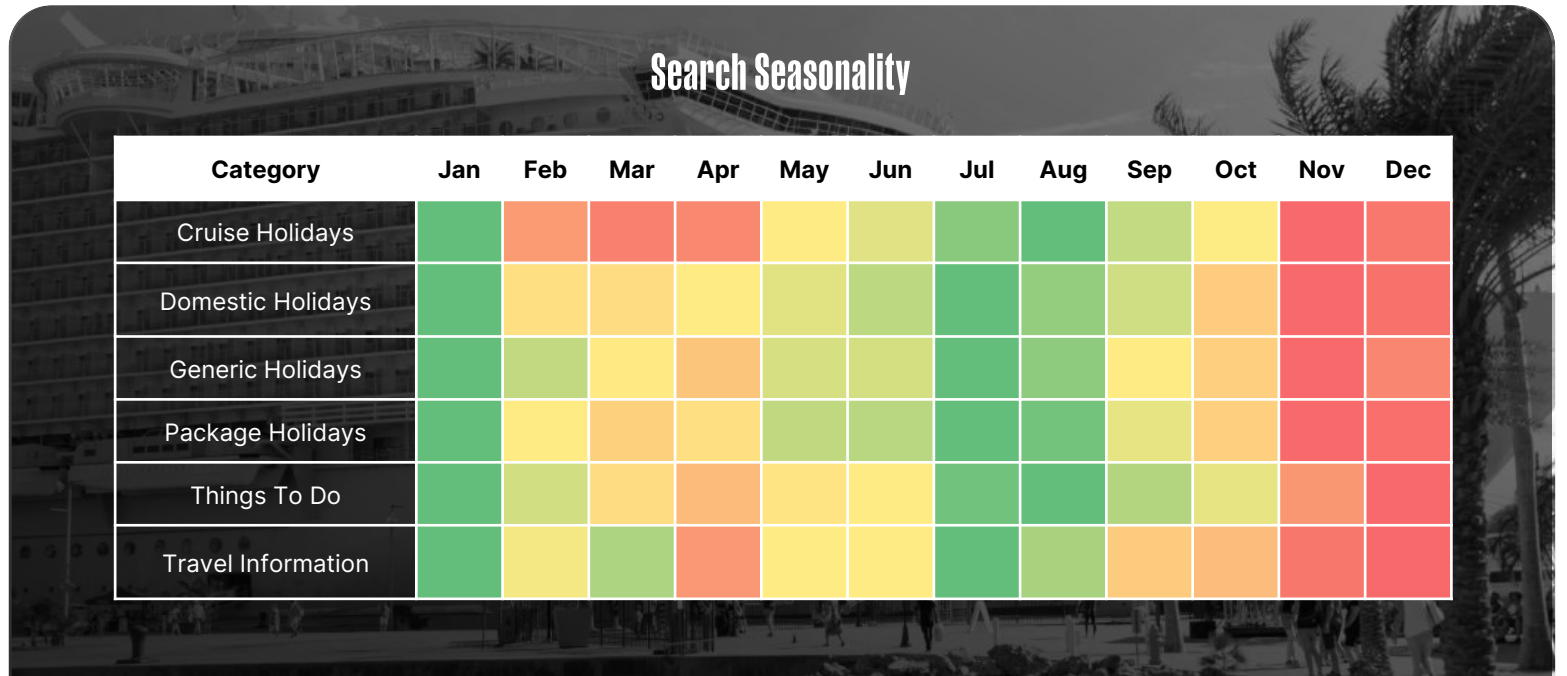
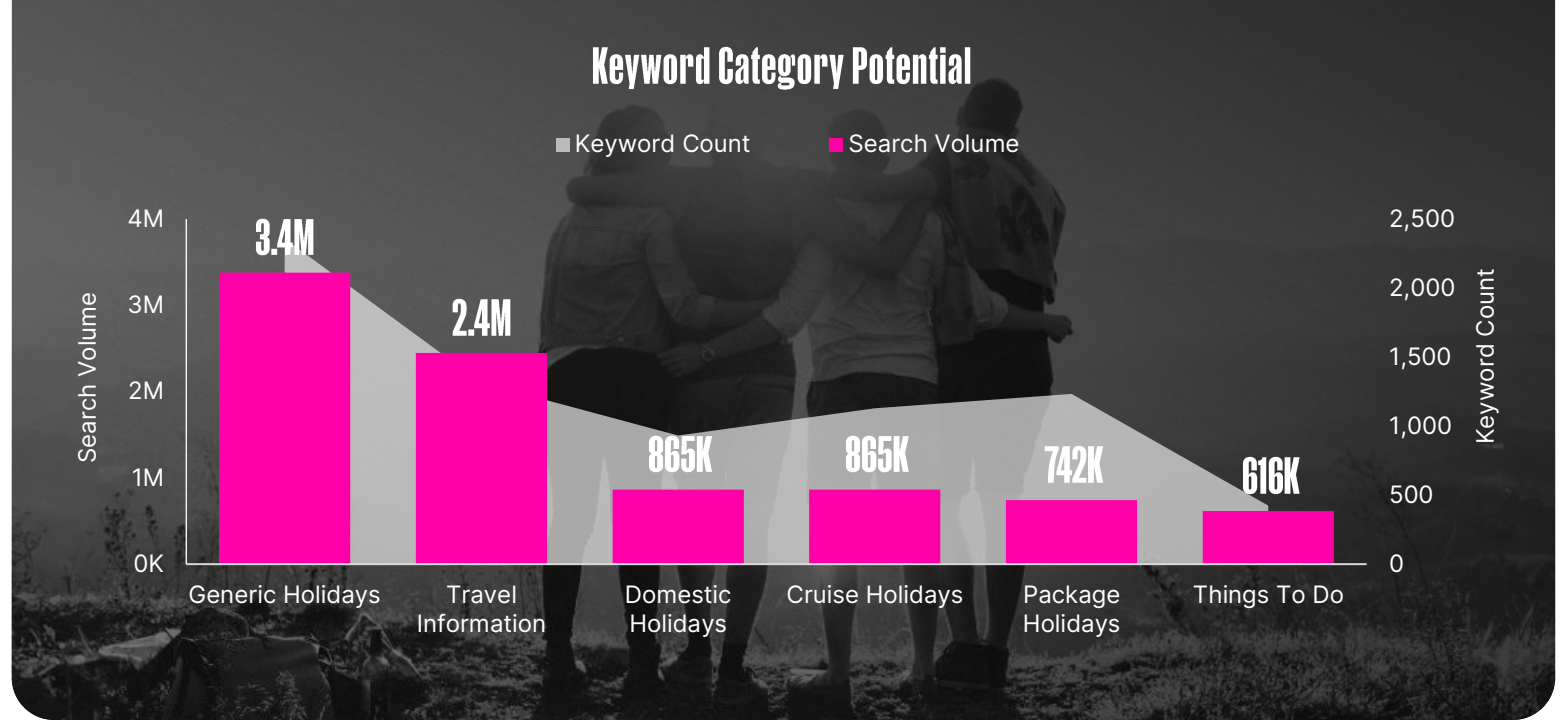


Search Opportunity

Using keyword research we can analyse the opportunity across travel/tourism products, giving us an idea of the potential web traffic available in this search market.

SEARCH OPPORTUNITY FINDINGS INCLUDED:

1. Generic Holiday search (including terms such as 'holidays' and 'weekend breaks') holds the largest search volume with **3.4M searches per month** in the UK.
2. The Travel Information category (featuring keywords focused on flight and train information) also has a high search volume (**2.4M monthly searches**), with independent bookers comparing flight costs.
3. Although other categories such as Things To Do and Package Holidays hold lower search volume, these keywords are a great opportunity to attract users at key moments in their journey to purchase.
4. Search for all categories peaks in January, with people thinking ahead for their summer getaway, and again in July/August for last-minute deals and future holiday planning.

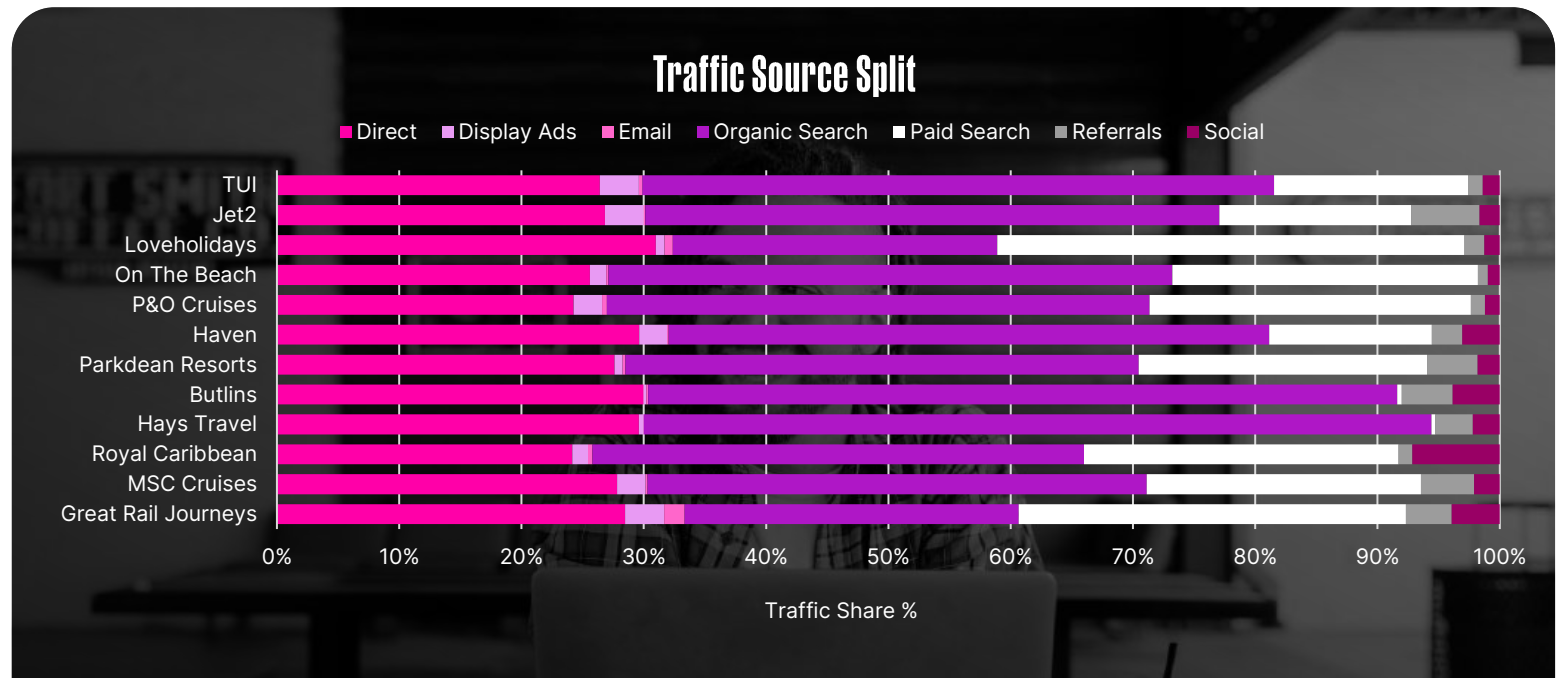
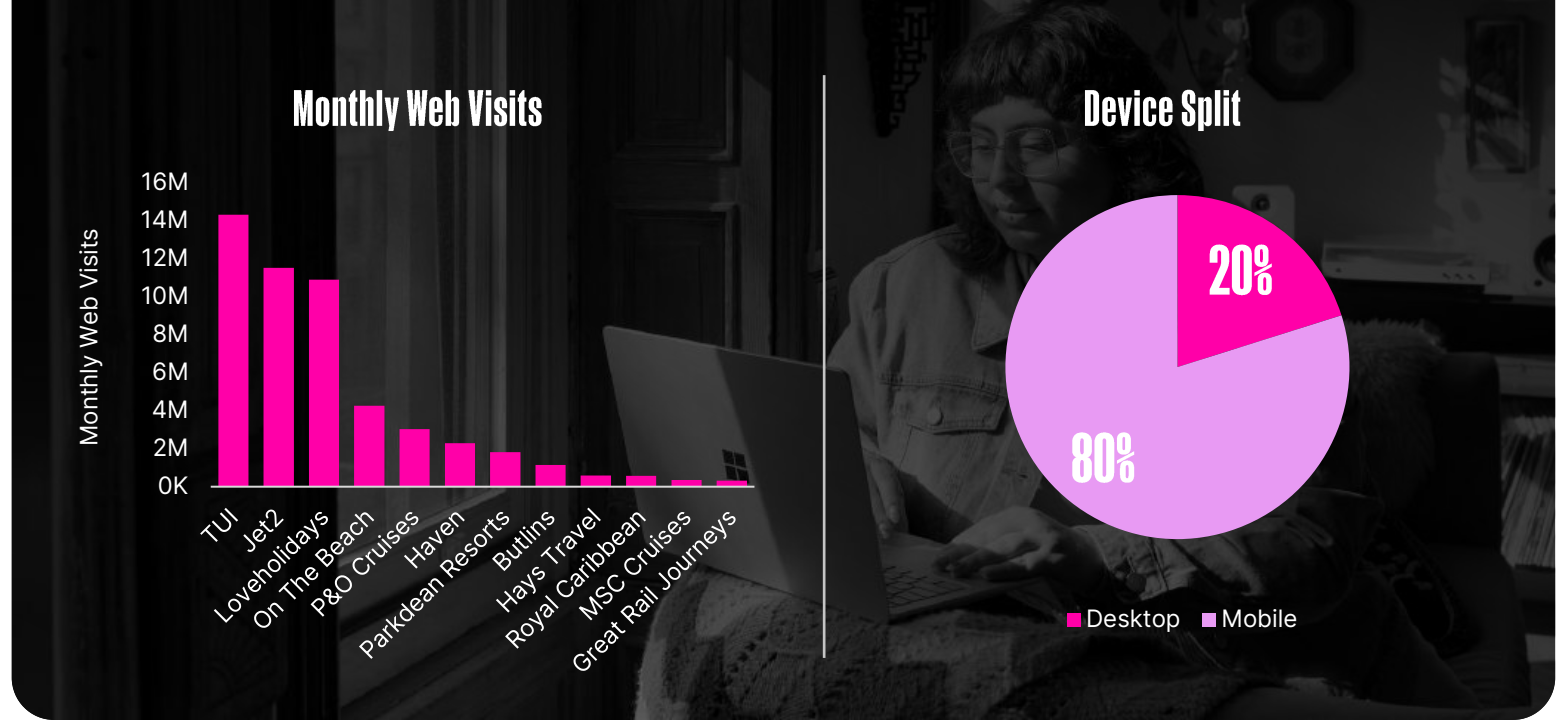


Traffic Analysis

Using traffic analysis across leading sites we can start to understand which channels drive high traffic to site. This will help influence where to focus energy to drive new website leads.

TRAFFIC ANALYSIS DATA SHOWED US:

1. TUI dominates monthly traffic with **14M** website visits. Their site is the only one to offer cruise, flights, hotels and package deals.
2. Optimising your website for mobile is crucial for this industry, with **80%** of competitor web traffic coming through mobile.
3. Direct traffic makes up, on average, **28%** of all web traffic. This share of traffic demonstrates the importance of having strong brand awareness within the travel sector.
4. Organic search is a standout traffic driver in this industry, commanding on average **45%** of web visits. Focusing on your website's organic performance will help improve ranking potential for valuable travel search queries.



SECTION 02

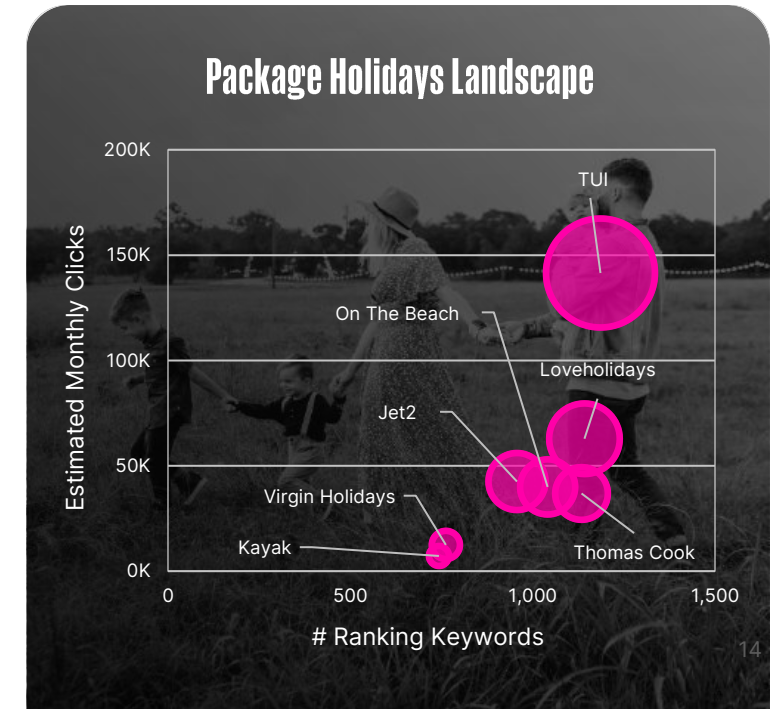
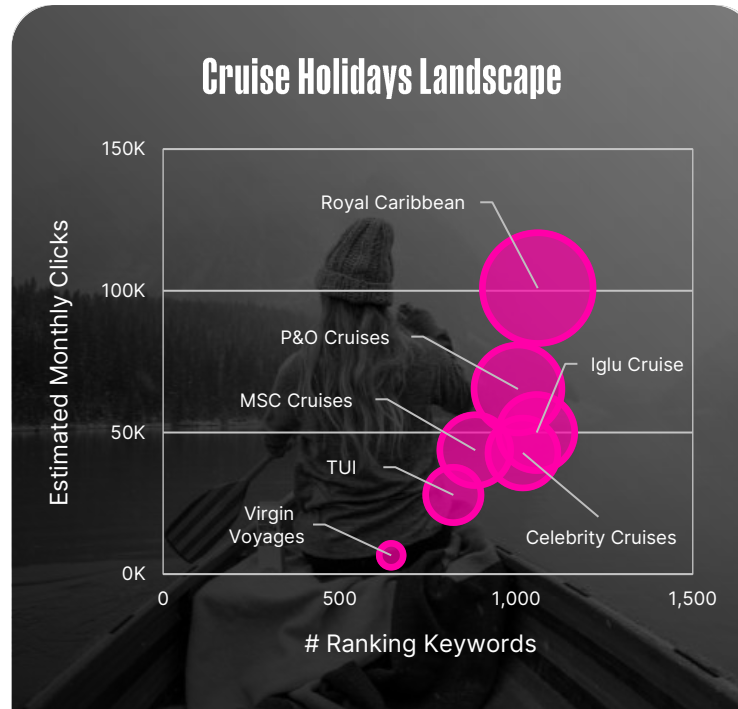
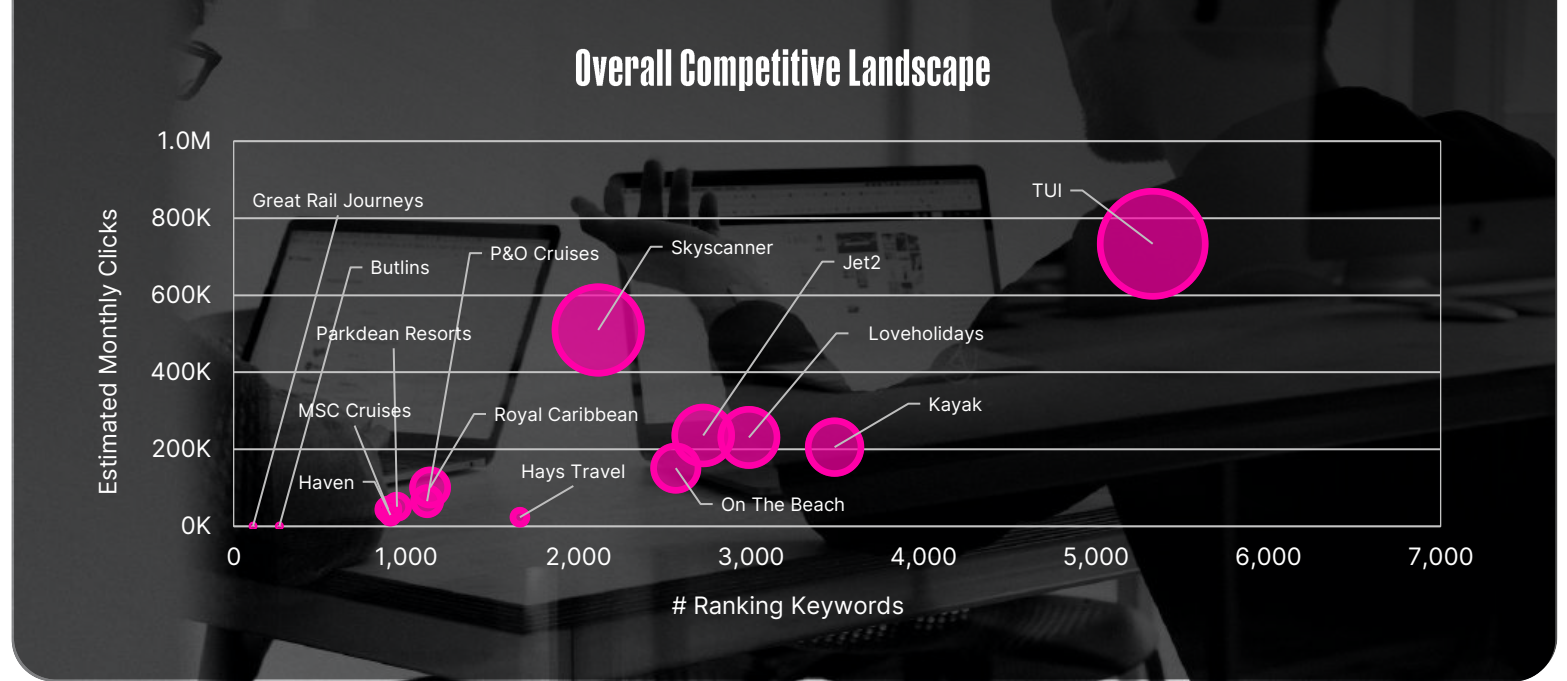
Delving into Experience

Organic Search

Using Google organic rankings, we have collated competitive landscapes to show what websites currently lead within the market.

ACROSS OUR ORGANIC LANDSCAPING, WE FOUND:

1. TUI is ahead of the pack for estimated monthly clicks (**733K**) and ranking keywords (**72% of the full keyword set**) due to their broad offering across holidays, flights and cruises.
2. The overall organic search landscape showcases a wide variety of providers and aggregators that compete in this highly competitive space.
3. Royal Caribbean are the best placed within the cruise category, though it is incredibly competitive with other cruise providers performing well organically.
4. TUI are currently dominating the package holidays competitive landscape, other holiday providers such as Loveholidays, Jet2 and On The Beach are also high performing websites, making this category another highly competitive space.



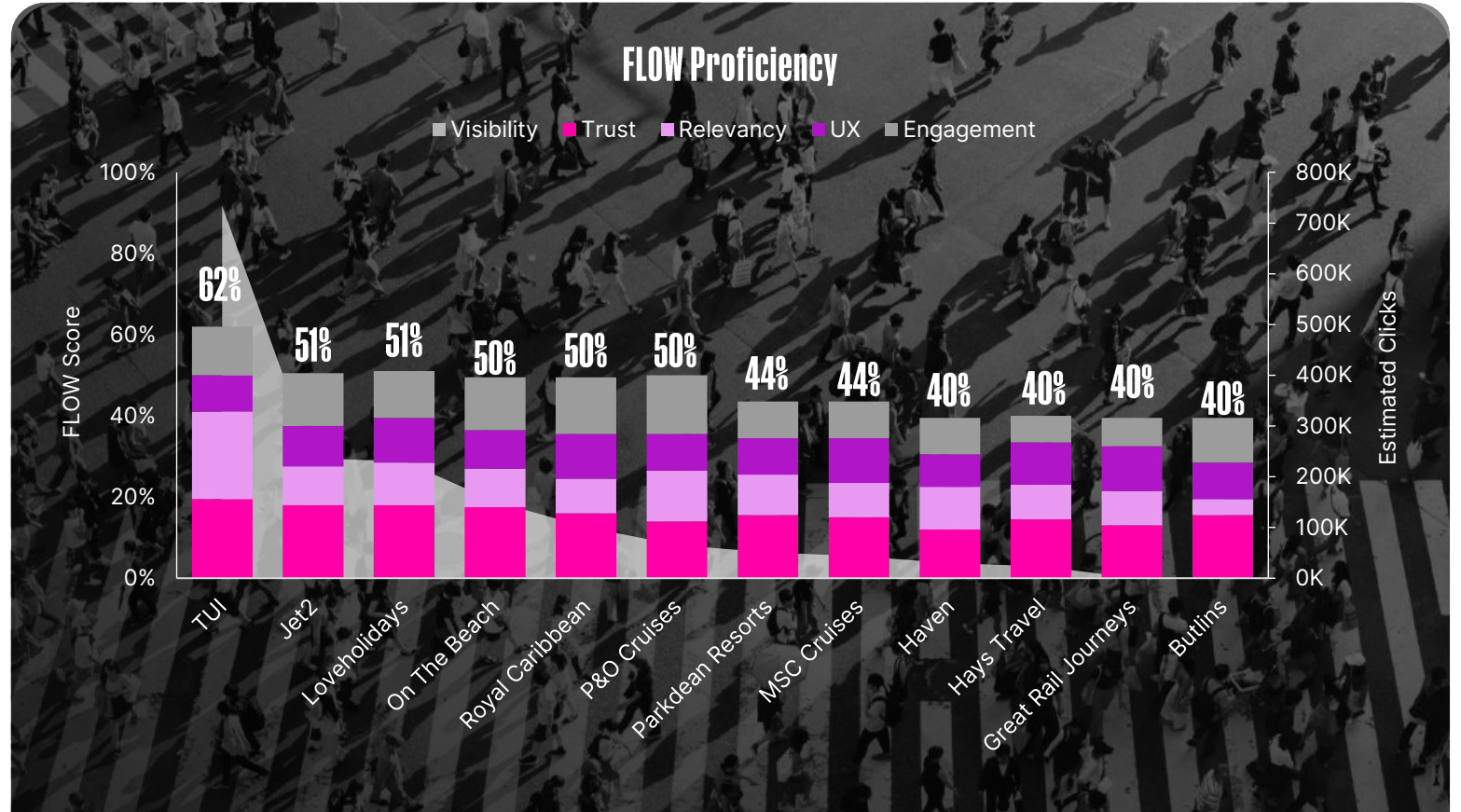
Website Proficiency

Using our in-house proficiency tool we have assessed leading brand websites across four key ranking factors; Trust, Content relevancy, User experience and Engagement. By performing well across each of these metrics your website will in-turn rank well organically.



THROUGH OUR RESEARCH WE FOUND:

1. With TUI being the only brand from our competitive set that offers Cruise, Domestic and Package Holidays the domain receives a high content relevancy score against our diverse keyword set.
2. Trust stands out as one of the key factors behind these website's high performance. Focusing on building a strong authority in this space can be achieved through your domain's rating, backlink profile or brand awareness.
3. With well established brands holding dominance in the Travel & Tourism search market, it is key to identify the pockets of keyword opportunity that best align with your product offering/services.

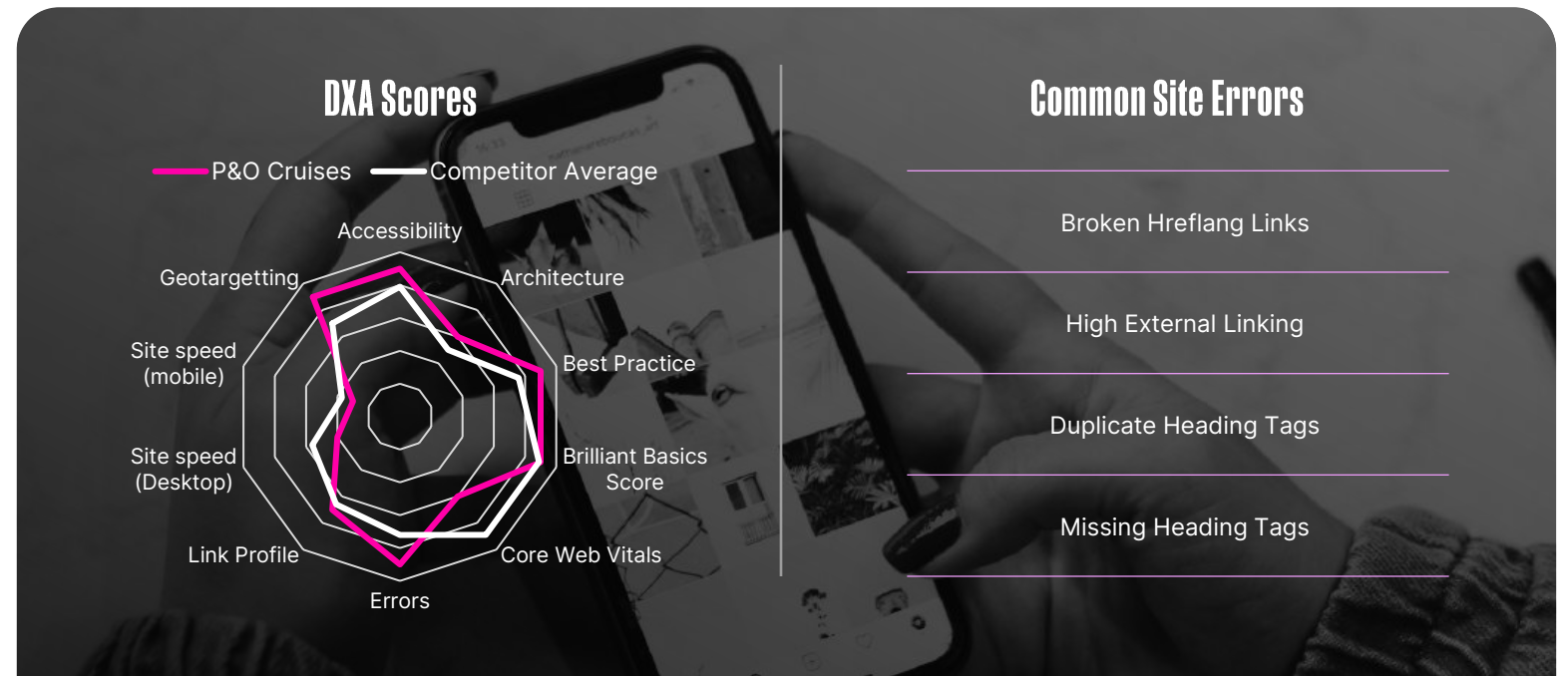
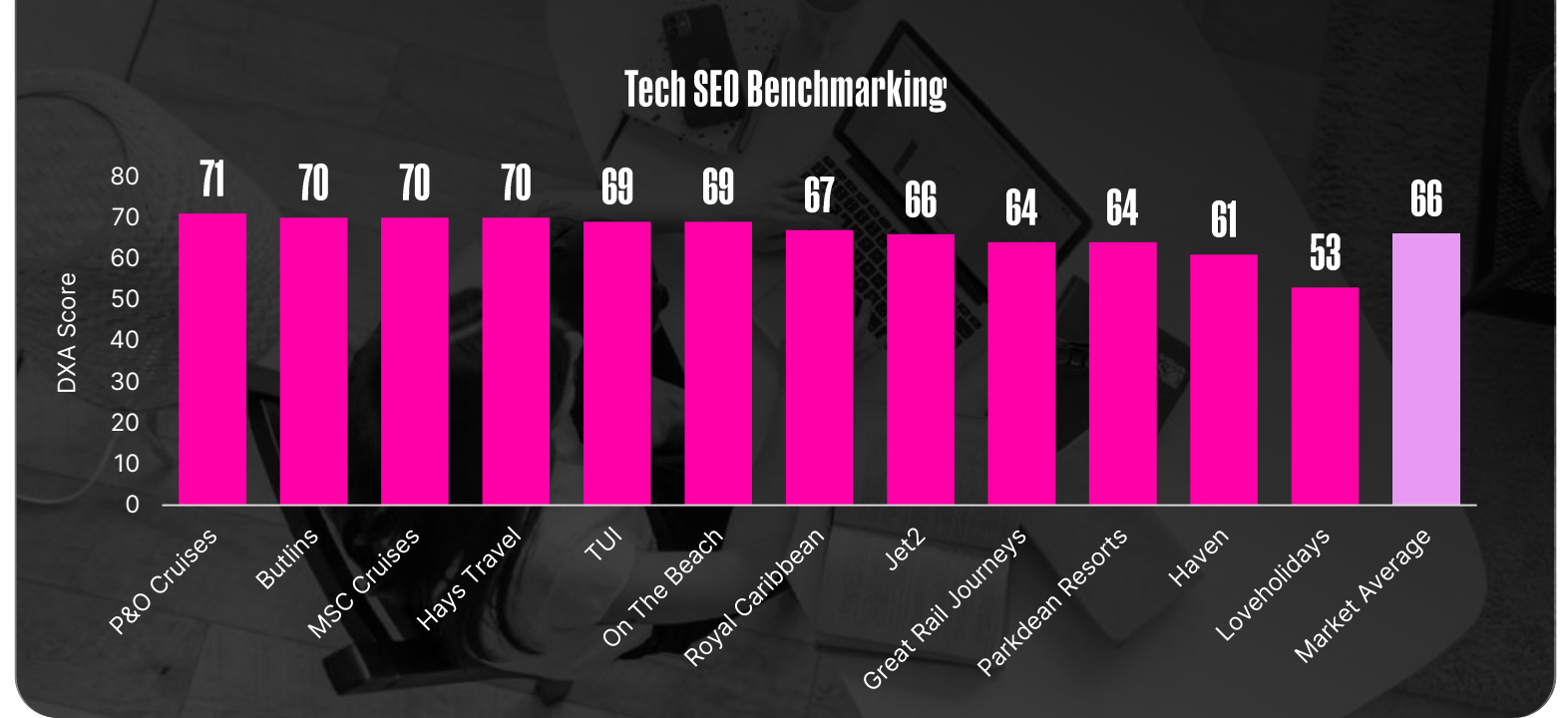


Tech SEO DXA

Assessing the competitive set through our in-house DXA (digital experience audit) we can look to identify how each site performs from a tech SEO point-of-view.

TOP INSIGHTS FROM OUR DXA DATA WERE:

1. Many websites scored above the average DXA score, with P&O Cruises scoring the highest. Performing best across accessibility and best practice metrics.
2. The **average DXA score across our competitive set is 66**, with accessibility, core web vitals and brilliant basics being the areas competitors score well in.
3. Areas where these sites need improvement overall are; architecture, site speed and site errors. By fixing these tech issues, sites can increase their organic ranking potential.
4. Common site errors across this competitor set include; broken Hreflang links, high external linking and heading tag errors.

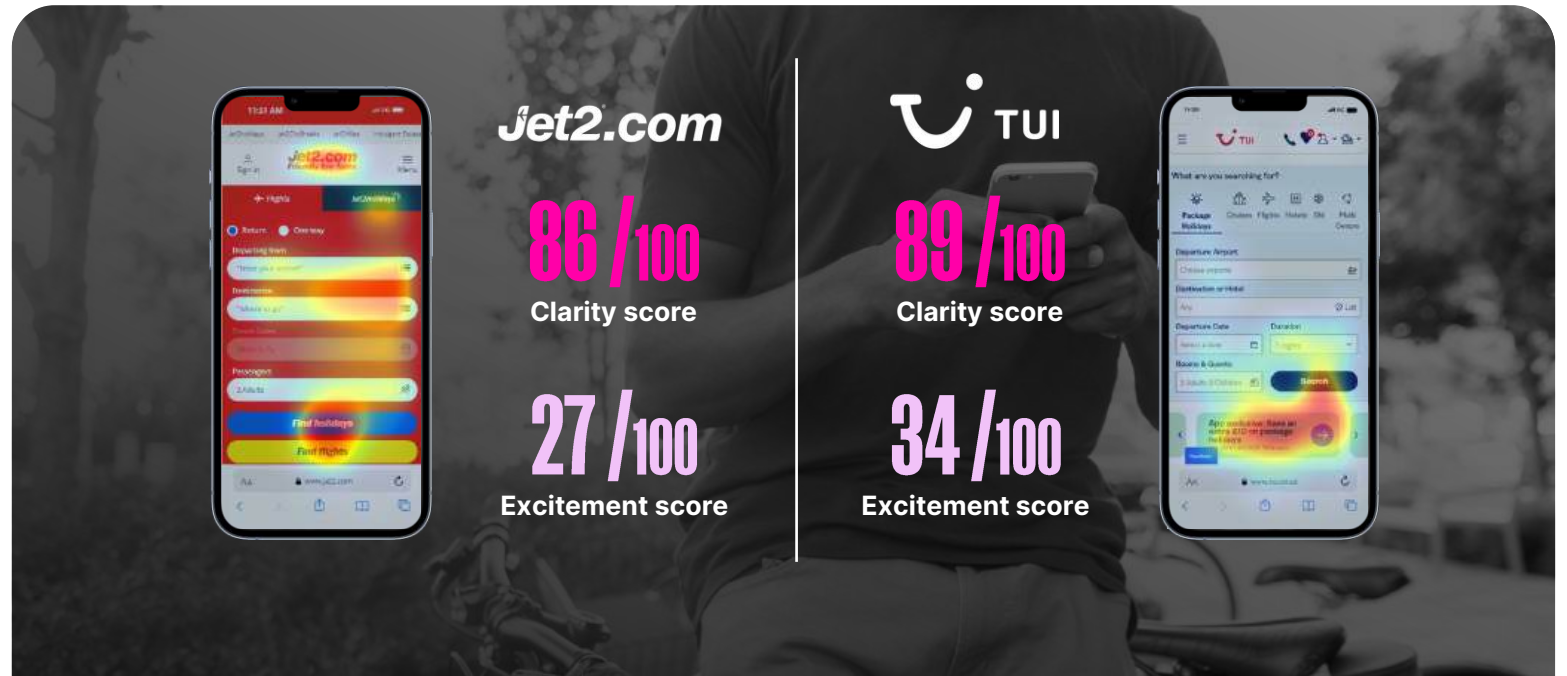
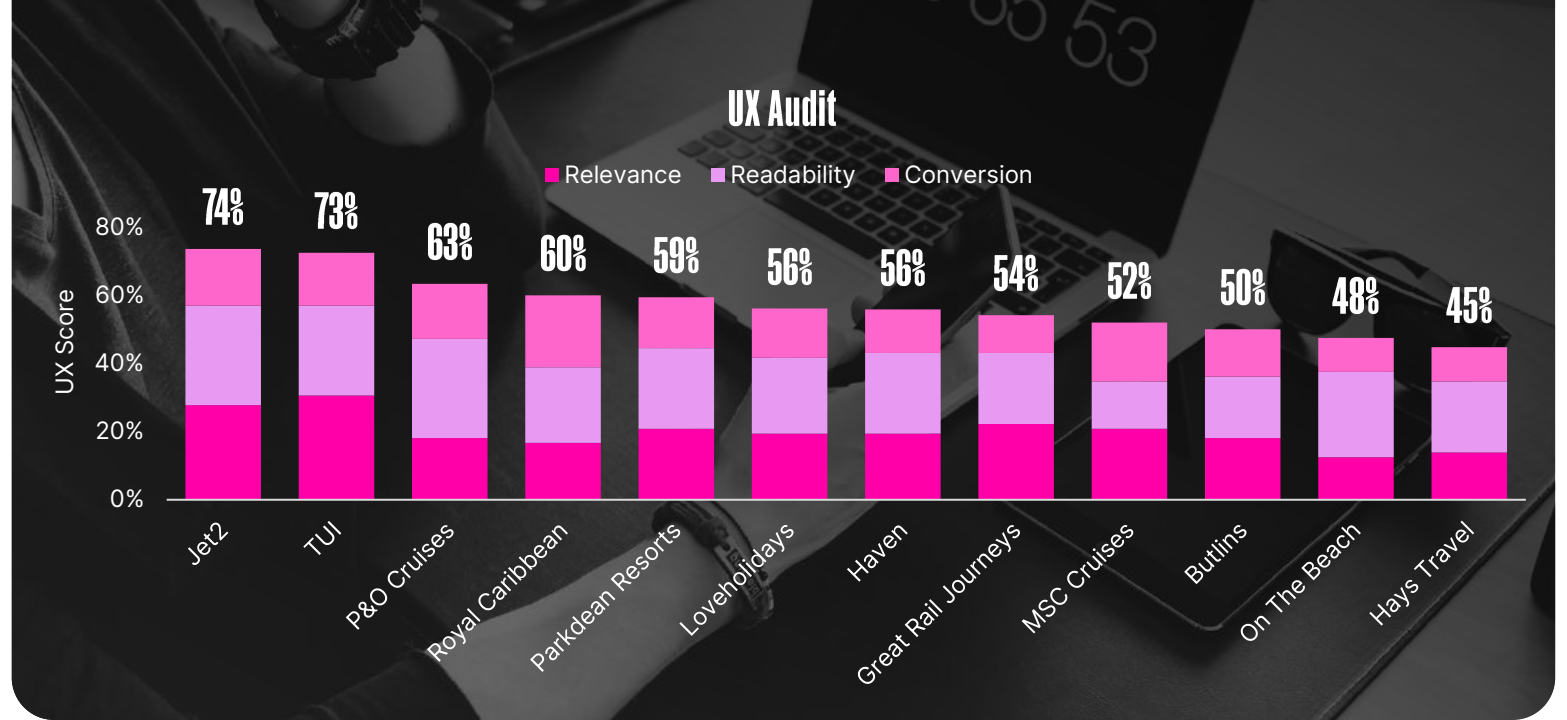


User experience

To measure user experience, we look at three key aspects; relevance (how relevant the website is), readability (how clear and concise the website is) and conversion (how simple is the conversion process).

THROUGH OUR USER EXPERIENCE AUDIT, WE FOUND:

1. Jet2 and TUI received the highest scores, with a clear, attractive website that is simple to navigate.
2. Using AI eye-tracking technology we assessed Jet2 and TUI's main webpages. With an optimum score of 70 we can see that the on-site content is focused on clarity and making it easy for users to find the information they need.
3. Focusing on the Jet2 website, they proficiently highlight key information and CTA buttons to ensure the user's journey is as smooth as possible. For example, the attention focused on the Jet2 logo shows the brand do a great job of centring the user's focus around the brand they are interacting with.



SECTION 03

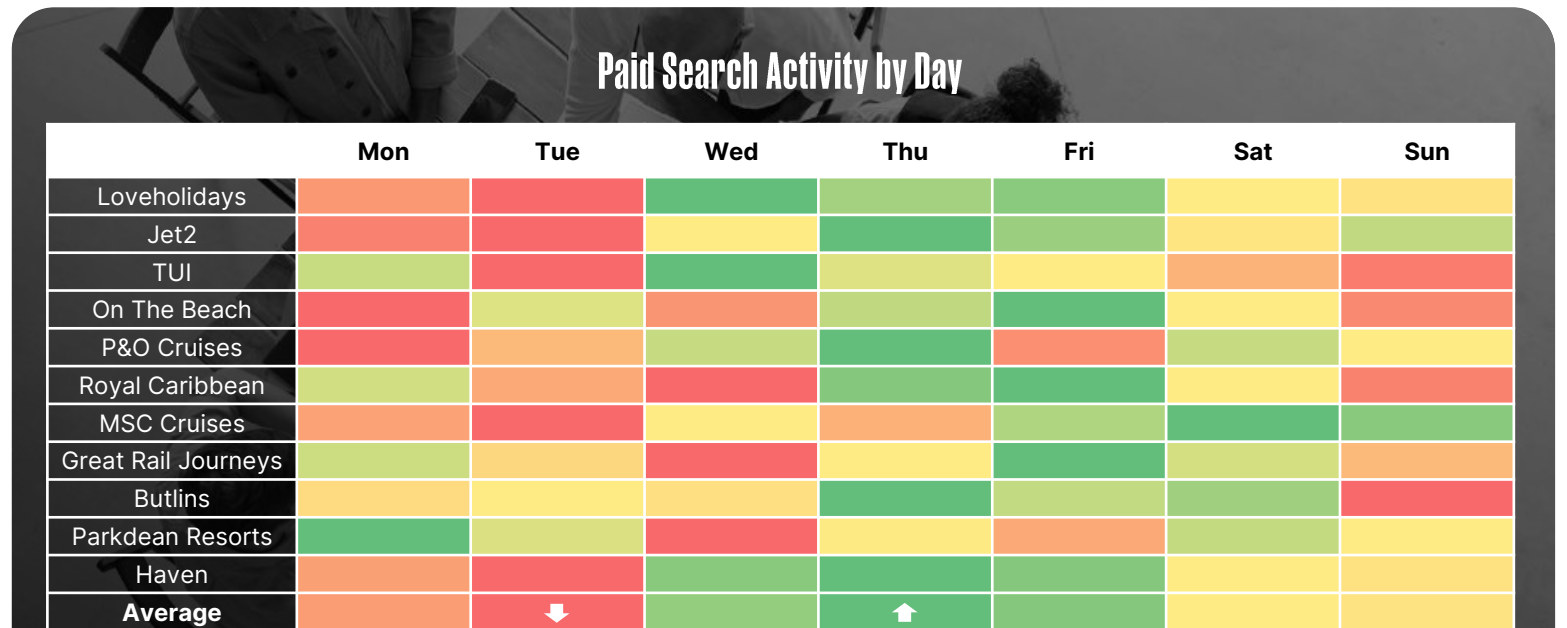
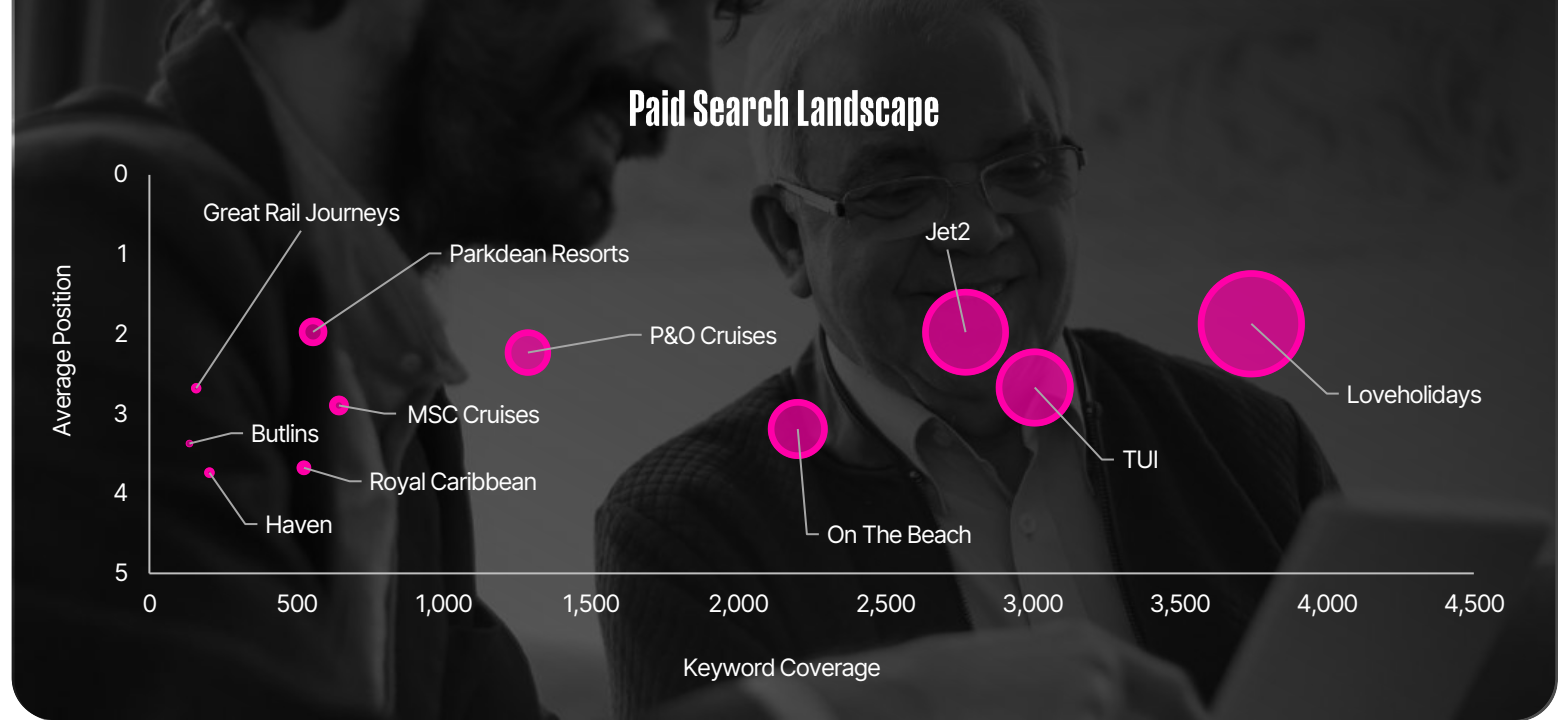
Assessing the Media

Paid Search

When organic ranking is proving elusive, paid search is a shortcut to driving traffic to your site. Using our Travel & Tourism keyword set we have gathered paid search activity over a snapshot period, identifying who the big spenders are in the market.

ACROSS OUR PAID SEARCH ANALYSIS, TOP FINDINGS ARE:

1. Overall, Loveholidays are seen to be the biggest investors, covering **34%** of the keyword set. This activity is estimated to return over **176K** monthly clicks.
2. Package holiday providers such as Jet2, TUI and On The Beach are seen to be spending more on PPC than Cruise and Domestic Holiday sites.
3. Analysing estimated traffic by day helps us to see when brands are most active throughout the week. Thursday/Friday stands out as the most popular day for bidding, we suspect this is due to the alignment with payday and deals for weekend travel.



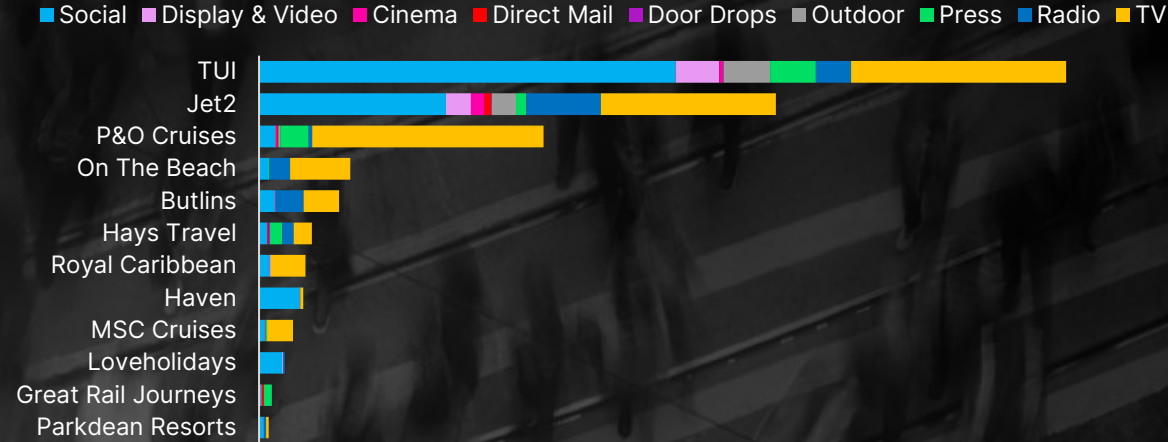
Media Spend Analysis

By understanding competitor media spend we can identify the marketing channels that hold the highest ROI.

COLLATING COMPETITOR MEDIA SPEND, WE DISCOVERED:

1. TUI is the biggest spenders overall, focusing **78% of their investment on social and TV advertising**.
2. Leaders in the market such as TUI and Jet2 are using a diverse media strategy, broadening their ad reach by tapping into multiple marketing channels.
3. Targeting holiday seekers whilst they are browsing social media can be a great way to attract new leads. Research shows Facebook and YouTube as the two social platforms where our competitor set focus their investment (**37% and 39% of social spend respectively**).

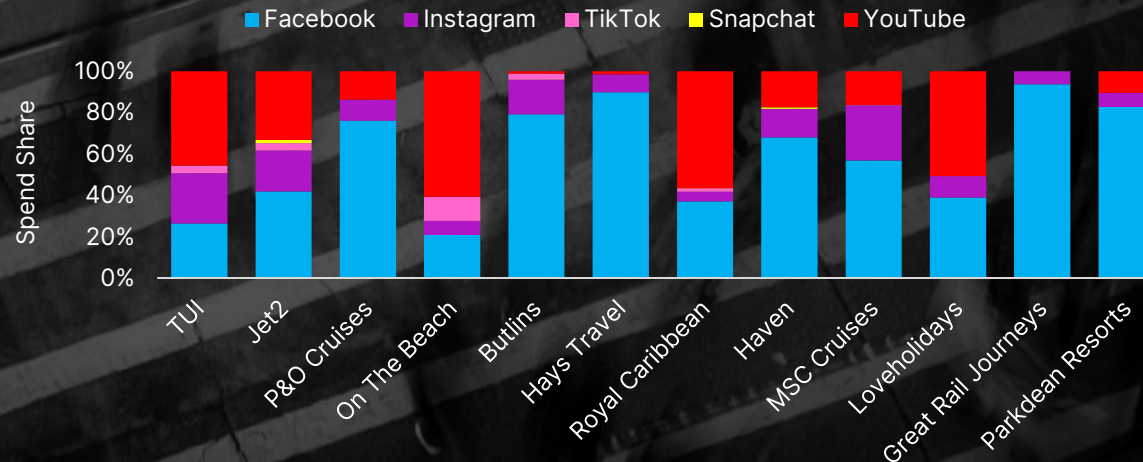
Competitor Media Spend



40%

Competitor media spend in TV ads

Awaiting confirmation we can include
Please do not publish without approval



39%

Competitor social media spend is invested into YouTube

SECTION 04



Reviewing the Content

Ad Creative

Research into competitor advertising helps you to understand what creative and messaging captures the consumer's attention.

ASSESSING AD CREATIVE, WE FOUND:

1. Using AI eye-tracking technology we can see how successful an advert is at directing your attention to key information. Royal Caribbean does well in capturing and directing users' attention towards the sales they have. They also use alliteration in posts to help viewers recall the advert.
2. Loveholidays succeed in showcasing the joy that awaits their customers, highlighting holiday imagery that will entice the user.
3. Both of these creative examples score well for excitement, with your brand's advert sitting amongst competitors in the market it is essential to catch the user's attention with your creative and messaging.

Ad Creative & Messaging



The target audience is more likely to be mature, so the Royal Caribbean's creative includes more detail than others in the sector, reducing the clarity but keeping the creative exciting with bright images of the cruise and potential destinations.

Whilst exciting, users aren't drawn to copy in the Instagram ad as they are in the Facebook example, ensuring your advert is both engaging and clear will help increase your CTR.

85%

Avg. Excitement

66%

Avg. Clarity

Ad Creative & Messaging



Using bold copy and contrasting colours in the creative Loveholidays receive high excitement and clarity scores. Looking at the heatmap the focus area is the centre of both photos, drawing attention to the relaxing resort and text.

Messaging is focused on experience and enticing audiences to book a holiday as soon as possible.

82%

Avg. Excitement

88%

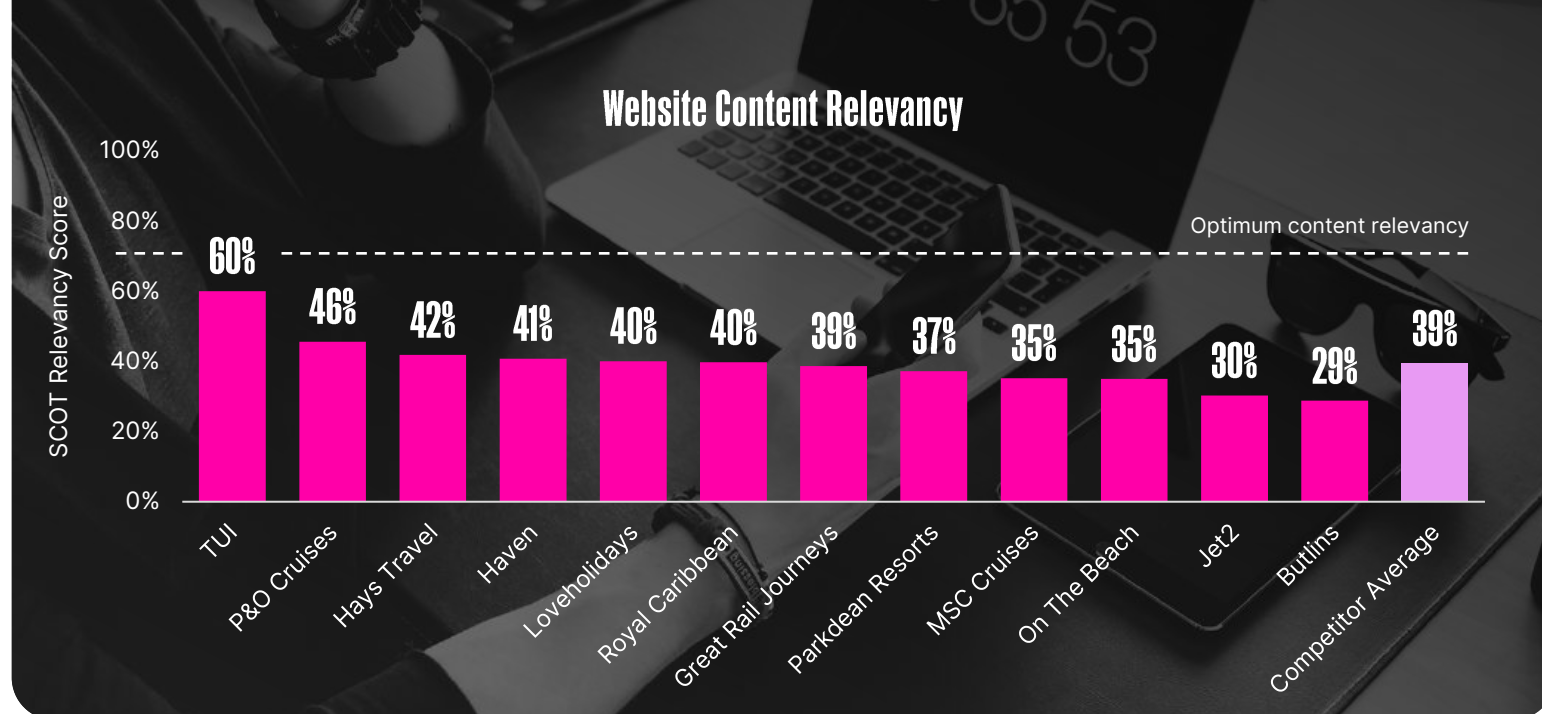
Avg. Clarity

Web Content Relevancy

Content relevancy is key to your website performance, helping you to rank organically and increase user engagement. Using our in-house content relevancy tool we have assessed leading brands against our keyword set.

THROUGH OUR RESEARCH, TOP INSIGHTS WERE:

1. With an optimum relevancy score of 70%, TUI are the only brand that receive a good relevancy score (**60%**) across our travel & tourism keyword set. This is largely due to their wide range of services that cover Cruise, Domestic and Package Holidays.
2. TUI's 'Cheap Holidays and Deals' webpage received some of the highest traffic from our analysis; **ranking for 111 keywords** and driving **90K monthly clicks**. Nearly half this traffic is from their #1 ranking for 'cheap holidays' (182K monthly searches).
3. One of P&O Cruises highest performing webpages was 'Mediterranean Cruise Holidays'; ranking, on average, **position 8 across 51 keywords**, this is estimated to drive **8K monthly clicks**.



TUI

#7
Avg. Ranking

90K
Est. Page Traffic

P&O CRUISES

#8
Avg. Ranking

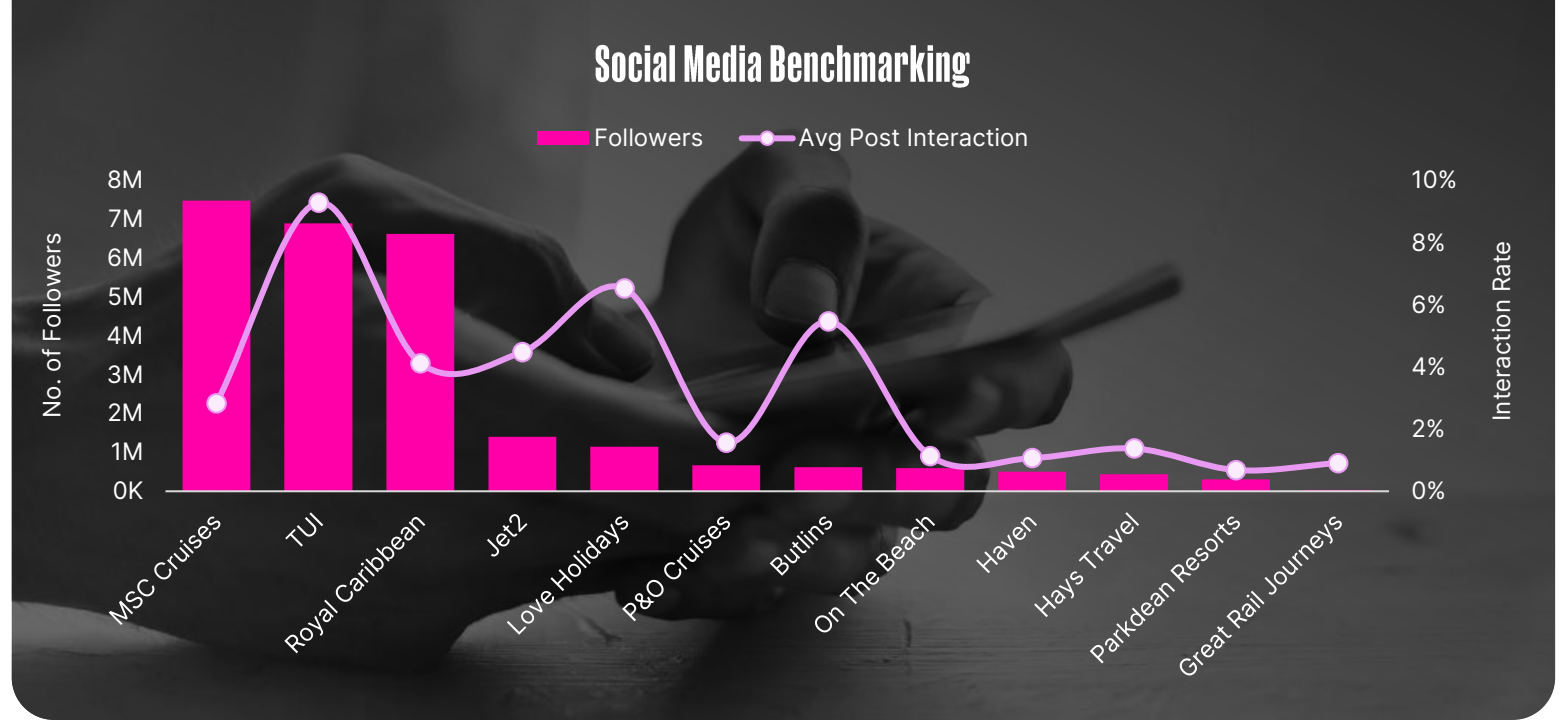
8K
Est. Page Traffic

Social Account Analysis

Analysing our competitor's social media accounts, we have looked at how successful each brand is organically. Analysing the marketing strategy of leading brands can help us understand what works best for consumers.

SOME OF THE TOP INSIGHTS WERE:

1. MSC Cruises and TUI lead with the largest social media follower base. Both brands have their highest follower count on Facebook, with MSC Cruises at **69%** and TUI at **90%**.
2. Instagram and TikTok offer great potential for brands to build on their online presence and grow their follower base. MSC Cruises and TUI achieved high interaction rates from their social posts across these two channels, which can serve as a reference for brands when running social activities.
3. MSC Cruises and TUI's most engaging posts consist of leisure activities available at different holiday destinations to trigger audience interest. Whether using humour or luxury as your brand's tone of voice, producing relatable, engaging content will help boost your online presence.



TUI

11.4K
Reactions, Comments & Shares

4.7%
Interaction rate

MSC CRUISES

348K
Reactions, Comments & Shares

7.2%
Interaction rate

Key Takeaways

Experience

- As evidenced through our traffic analysis, organic search makes up a huge portion of travel company's web traffic. Well established brands currently dominate the overall search landscape, making a multi-channel approach key to driving new leads.
- With this sector being highly competitive, it is key to ensure your website is well optimised and a clear representation of your brand. Regularly monitoring competitor web performance will help you to understand where focus is needed to provide a simple and pleasant user experience for holiday seekers.

Media

- Despite organic media being a powerful tool, it's worth merging organic with a strong paid strategy to maximise your reach potential. Learning from competitors can help you refine your paid activity.
- TV and social spend are the standout channels for many competitors. Utilising these marketing channels your brand should look to stand out from the crowd and capture the audience's attention with enticing ad creative
- With high competition across the organic search landscape, building a paid search strategy that compliments your organic ranking performance will help drive valuable website traffic.

Content

- Ensuring ad creative and messaging is clear and enticing is key to attracting users. Loveholidays do this well with short but clear messaging with bright bold images showing customers the potential holiday that awaits them.
- Instagram and TikTok offer great potential for brands to build on their online presence. The right creative can help drive high interactions and engagement, as demonstrated by MSC Cruises and TUI's content.
- Content can be led by data gained through organic search and social listening. Using these tools can help determine what travellers are excited about or what frustrates them, which can inform future content creation.

Get in touch

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About KINNESSO

When it comes to tech-driven performance marketing, we do things a little differently. We're part of the world's largest performance marketing network, with over 6,000 colleagues in 60 countries around the world, coming together to make experience, media and content work for your audiences.

We give brands the clarity and confidence to take action.

When consumers can do what they want, find what they want and get what they want, that's when things flow. Our approach to flow is designed to understand why consumers behave in the ways that they do, how and why they engage with brands and products and, crucially, how we can make that experience better.

When we do that, we can direct the attention of audiences to what is important to them, focus their engagement with content that meets their needs, and eliminate those sources of fiction that harm the customer journey.



KINNESSO





KINESSO

Thank you