+44 20 8123 2220
info@marketpublishers.com

UK Travel and Tourism online intelligence report, Jan – Sep 2012

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Abstracts

What will you get from this report?

A who's who in online travel and tourism markets.

In-depth market analysis covering January 2012 to September 2012.

Over 100 individual pieces of key insights.

Over 50 individual pieces of statistical interpretation.

Analysis of the top 100 brands across the top 200 keywords.

An interpretation of the top brands search and social media strategies.

What questions do we answer?

Who are the market leaders?

Which keywords are driving market visibility?

What are brands doing to achieve maximum market share?

How are brands using social media to acquire customers?

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Top Insights

The financial crisis of 2008 has made the 'staycation' trend a key feature of UK travel and tourism landscape, facilitating the growth of search impression volume in key markets such as cottage holidays, coach holidays, as well as short and city breaks.

Travel price aggregators lead the organic click share index in seven of the top ten travel and tourism sub-verticals. These include the high volume keyword markets flights and hotels as well as coach holidays, short and city breaks, villa holidays and coach holidays sub verticals.

TUI leads the highly prized generic keyword market for holidays with its Thomson brand. When we factor in their all inclusive brand First Choice this gives the group a collective organic click share of 31.65%.

Over 80% of the click share volume within both the flights and hotels keyword sectors comes from travel price aggregators; the most prominent include Cheap Flights, TravelSupermarket, Lastminute.com, LateRooms and Booking.com.

Google is reshaping the search engine results pages (SERPs) for key location terms such as hotels in London and hotels in Paris. High positions within these listings are partly dependent on the quality of the reviews posted by customers.

Virgin Atlantic leads our social score card index; however, this is only marginally ahead of both Thomson and Thomas Cook. This is indicative of the fact that all these brands are deploying a well co-ordinated social media strategy and all view the channel as a key part of their online activity.

British Airways and Thomas Cook have the most holistic Facebook and Twitter presence in which they have the largest audience that is both consistently and positively engaged.

Key Findings of the report

What's shaping online travel and tourism?

Since 2009 the number of domestic holidays has increased from an average of

53.86% between 2006 to 2008, to 61.31% meaning that for every ten holidays taken, six are domestic.

Airline operators lead the market in terms of overall brand search impression volume with 38.90%, followed by hotels with 21.36%.

Regarding the volume of brand search impression, EasyJet leads the flights sub-vertical, with Premier Inn heading hotels, Expedia topping the table for travel aggregators, while TUI dominates traditional high street travel agents via their First Choice and Thomson brands.

A macro-analysis tells us that the generic sub-vertical markets including: holidays, flights and hotels dominate the search impression volume with a collective 76.58%.

The most lucrative generic keywords are cheap flights, cheap holidays, holidays and low cost holidays with a collective 70.75% search impression volume, while the top location terms are hotels in London, London hotels, cheap flights to New York as well as ferry to France.

With 15.35%, Thomson is the leading brand within the generic keyword market for holidays, while Cheap Flights heads the keyword sub-vertical for flights with a massive 30%, pushing the price aggregator TravelSupermarket into second place.

Market leaders within the hotels sub-vertical Lastminute.com and LateRooms.com have developed a holistic presence within search, each leveraging both paid and organic search in order to drive and maximise market exposure.

Competition within the all-inclusive and package holiday sub-vertical is intense. This is reflected in the aggregated click share index in which there is less than 4% separating the top seven brands, including The Co-operative, First Choice, Onthebeach and Thomas Cook.

TUI is one of the most aggressive brands within the ski holiday market, under the sub-brands of Crystal Ski and Thomson Ski, giving them an impressive aggregated click share of 41.74%.

Within the short and city break keyword market, Superbreak has the largest aggregated click share index with 20.89%, however, it is Lastminute.com who is well positioned to challenge for top spot. Not only has Lastminute.com seen its rankings increase for a range of organic phrases, but unlike Superbreak, it makes extensive use of paid search.

P&O Ferries aggregated click share of 20.57% is indicative of an aggressive paid and organic search strategy, making them a leading brand within the ferry holiday sub-vertical.

With an impressive 42% aggregated click share Shearing Group, via three separate brands, dominates the coach holiday keyword market.

Thomas Cook is indicative of how many of the top travel and tourism brands have seamlessly integrated their main site with a wide range of social assets including travel blogs, Google+ page, as well as Facebook and Twitter, in order to engage directly with customers.

EasyJet is one of the few leading brands that has developed a social media strategy which has the most robust balance between engagement quality and volume.

Brands are extensively using competition techniques on social media to engage with potential and existing customers.

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