Travel industry SEO report

Contents

Travel industry statistics

£252bn

The UK travel and tourism sector is forecast to generate £252.4bn by the end of 2023 (10% GDP), overtaking the pre-pandemic peak of £248.5bn in 2019.

Source

+17.5%

UK cardholders are spending 17.5% more on hotels, resorts and accommodation despite average consumer spending only growing by 4.3% in April 2023.

Source

78%

Travel intentions are higher than last year with 78% planning to take an overnight domestic trip in the next 12 months and 60% an overseas trip.

Source

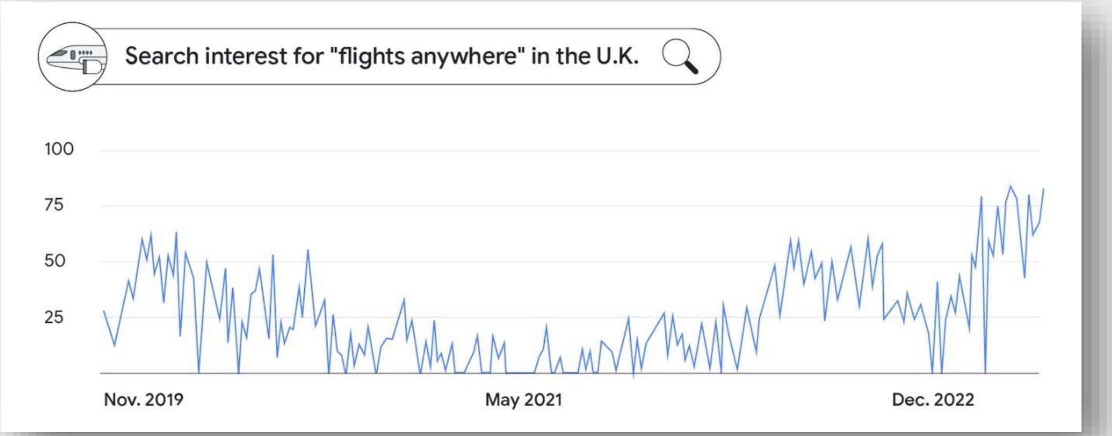
7.9bn

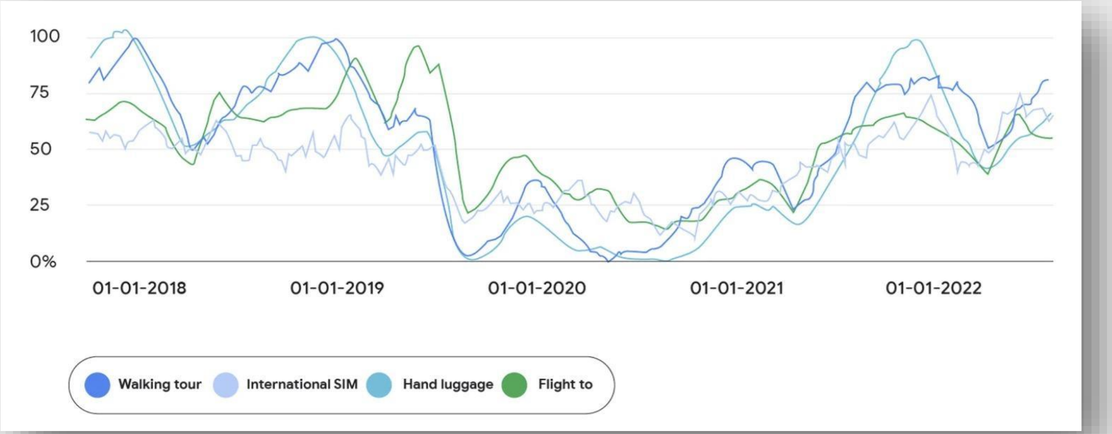
Overseas residents made 9.9 million visits to the UK in Q2 2023, spending £7.9 billion – up from 8 million and £6.8 billion the previous year

Source

New priorities for UK travelers

- Searches for "flights anywhere" doubled since pre-pandemic.
- Searches for "cheapest places" and "cheap flights anywhere" are significantly up since the pandemic.
- Queries including modifiers for price ("cheap", "deals", "discount", "offer") and comparisons ("best", "compare", "review", "popular") have all increased.
- UK travellers now spend almost 3x as much time planning trips than actually travelling (74% vs 26%).
- Travel planning searches are getting more detailed – eg: international SIMs, specialist tours, etc.





Top domestic cities

London is the top UK city for domestic travel

Google Trends data shows London is the most attractive destination for UK domestic travellers.

Britons taking more domestic trips vs 2022

Brits took 29.3 million domestic overnight trips in Q2 2023, an increase of 6% from Q2 2022, showing appetite is still strong in the post-Covid era.

Brits spending more per domestic trip

British residents spent an average of £272 per domestic trip (up 5% vs Q2 2022) and £96 per night (up 14% vs Q2 2022). The average domestic trip lasted 2.8 nights (down 8% vs Q2 2022), which could indicate the impact of rising costs.

Source

	City	Relative interest
1	London	100
2	Edinburgh	34
3	Manchester	22
4	Glasgow	18
5	Belfast	17
6	Birmingham	12
7	Liverpool	11
8	Bristol	9
9	Newcastle	8
10	Blackpool	7

International destinations

Spain is the top country for international searches

Search data for flights and accommodation to international countries shows Spain and the US are the top destinations for UK travellers - by quite a margin.

Amsterdam is the city UK travellers research most

At the city level, interest is more evenly distributed with Amsterdam topping the list of search volumes, followed by New York, Dubai and Dublin.

City searches demonstrate higher booking intent

Once travellers pinpoint specific cities of interest, they're more likely to take action and respond to the right offer.

Source

	Country	Rel	City	Rel
1	Spain	100	Amsterdam	100
2	United States	98	New York	95
3	France	47	Dubai	94
4	Italy	44	Dublin	89
5	Ireland	39	Paris	70
6	Netherlands	38	Barcelona	43
7	United Arab Emirates	37	Alicante	41
8	Germany	33	Lisbon	35
9	India	28	Rome	34
10	Portugal	26	Prague	28

Rel = Relative interest

Top UK destinations for international travelers

UK tourism still recovering from pandemic

The UK welcomed 9.9m inbound visits in Q2 2023, down 5% vs pre-pandemic levels, but 24% higher than Q2 2022, and visitors spent a record £7.9bn in Q2 2023.

London the top UK destination for international travellers

The top 10 UK cities for international travellers looks very similar to domestic, but London has an even stronger lead at the top.

London named top European city for hotel investment in 2024

Investors have named London as the most attractive European city for hotel investment in 2024. Deloitte

Source

	City	Relative interest
1	London	100
2	Edinburgh	14
3	Manchester	10
4	Birmingham	5
5	Glasgow	4
6	Bristol	4
7	Liverpool	3
8	Belfast	3
9	Newcastle	2
10	Leeds	1

Rel = Relative interest

Flights | Top destination searches

Domestic flights are important to UK travellers

UK travellers search for domestic flights more than 2x any international destination.

Amsterdam, Dublin and New York top list of overseas city breaks

Short-distance city breaks dominate the top 10 list but New York rises to the fourth spot, overtaking Dubai as the top long-distance destination.

Domestic travel still a priority for UK travel brands

Domestic travel numbers are still growing beyond pandemic levels, but this has always been a key market for domestic airlines, hotels and other travel business.

Source

	Country	Rel	City	Rel
1	United Kingdom	100	London	100
2	United States	56	Amsterdam	93
3	Spain	44	Dublin	85
4	France	27	New York	84
5	Italy	26	Dubai	77
6	Ireland	24	Edinburgh	66
7	Netherlands	23	Paris	61
8	Germany	21	Alicante	44
9	United Arab Emirates	20	Belfast	41
10	India	18	Barcelona	37

Rel = Relative interest

Hotels | Top destination searches

Google might not be the best data source for hotel interest

Google data for hotels is dominated by domestic interest but the numbers look skewed, suggesting UK travellers turn elsewhere for researching and booking overseas accommodation.

Airbnb's list of top destinations is very different

For international trips, Airbnb says Brits are most interested in Asia with Hong Kong, Thailand and Japan among the most-searched countries in Q3 2023 (no search volumes).

Long-tail keywords are more telling

Long-tail keyword research for queries like "best places to stay in" provide a more reliable gauge of early funnel interest.

	Country	Rel	City	Rel
1	United Kingdom	100	London	100
2	Spain	12	Edinburgh	18
3	United States	6	Manchester	15
4	France	3	Dubai	12
5	United Arab Emirates	2	Liverpool	11
6	Turkey	2	Birmingham	11
7	Italy	2	Glasgow	11
8	Greece	2	Blackpool	10
9	Ireland	1	New York	9
10	Netherlands	1	Benidorm	8

Rel = Relative interest

VERTICAL LEAP

What inspires UK travellers?

I wanted to visit a friend or family member

8%

I felt I was due a vacation

19%

I regularly think about trips I want to take

19%

I'm going to celebrate a special event

7%

I had wanted to travel to a destination for some time

15%

Source: Think with Google

Top queries including "things to do in"

"Things to do in" keyword opportunity

With high search volumes and relatively low keyword difficulties, "things to do in" searches are an important keyword and content marketing opportunity.

Top 23 "things to do in" queries specify domestic locations

Domestic locations get the most interest again with Amsterdam, Paris and Barcelona being the top three international searches for "things to do in".

Location targeting pinpoints travel planning

You can use location targeting to exclude the locations included in "things to do in" keywords to pinpoint audiences planning potential trips.

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	Keyword	Volume	KD %
1	Things to do in London	110,000	65%
2	Things to do in Edinburgh	40,500	58%
3	Things to do in Manchester	40,500	44%
4	Things to do in York	33,100	49%
5	Things to do in Amsterdam	27,100	59%
6	Things to do in Bath	27,100	48%
7	Things to do in Birmingham	27,100	45%
8	Things to do in Liverpool	27,100	42%
9	Things to do in Bristol	22,200	51%
10	Things to do in Dublin	22,200	57%

KD = Keyword difficulty

Top queries including “best place to stay in”

Travel research and booking is cross-platform

Travel brands need to analyse consumer interests across the whole research and booking process as they move to search on other platforms like Airbnb, insurance comparison sites, etc.

Early funnel vs end-of-funnel interest

Although search volumes for “best places to stay in” can include a lot of early-funnel interest, it reveals important locations of interest. Search volumes for “flights to Malta” are significantly higher than “flights to London” and “flights to Paris: (14.8K vs 9.9K and 9.9K).

Know where your target audience is booking

Travel bookings are scattered across multiple platforms so make sure you know where to be present and source your data from.

	Keyword	Volume	KD %
1	Best places to stay in Malta	1.9K	41%
2	...Santorini	1.9K	43%
3	...Cornwall	1.9K	43%
4	...Cotswolds	1.9K	41%
5	...Amsterdam	1.9K	47%
6	...Crete	1.6K	36%
7	...Paris	1.6K	59%
8	...Bali	1.6K	47%
9	...Sicily	1.6K	40%
10	...Barcelona	1.3K	48%

KD = Keyword difficulty

Top queries including “flights”

More UK travellers using Google Flights

UK searches for Google Flights have increased significantly to 1.2 million per month. This is still a fraction of Skyscanner’s 6.12 million monthly searches, but a serious increase, nonetheless.

High search volumes for “cheap flights”

Searches for “cheap flights” remain higher than pre-pandemic levels, potentially pointing to economic concerns about the cost-of-living crisis.

Branded searches crucial for flight bookings

Outside of booking platforms like Skyscanner, branded searches are key for airlines and flight bookings.

	Keyword	Volume	KD %
1	Google flights	1.2M	96%
2	Flight tracker	673,000	90%
3	Flights	673,000	100%
4	Cheap flights	450,000	85%
5	easyJet flights	301,000	71%
6	Flight radar	246,000	91%
7	Jet2 flights	201,000	60%
8	Ryanair flights	201,000	66%
9	Flight radar 24	135,000	79%
10	Tui flights	135,000	60%

KD = Keyword difficulty

Top queries including “hotels”

Big platform dominance

With 450K monthly UK searches for “hotels,” this compares to 3.4 million searches for “Airbnb” alone.

Third-party data and long-tail keyword research required

Travel brands need to tap into third-party data from the likes of Airbnb and long-tail keyword research (eg: “best hotels in”) to get the complete picture.

‘Near me’ search opportunity for spontaneous travel

Search volumes for “hotels near me” show brands can still win opportunities while travellers are already on the road or making spontaneous bookings.

	Keyword	Volume	KD %
1	Hotels	450,000	97%
2	Hotel Chocolat	301,000	58%
3	Hotels near me	246,000	69%
4	Hotel	201,000	98%
5	Hotel near me	110,000	72%
6	Hotels in London	90,500	63%
7	Edinburgh hotels	60,500	59%
8	Hotel London	60,500	65%
9	Hotels.com	60,500	84%
10	Blackpool hotels	49,500	48%

KD = Keyword difficulty

Related keywords for "holiday"

High search volumes for major brands

Search volumes for major brands are significantly higher than location searches, such as "Dubai holiday" or "Dubai flights".

Upward trend in travel brand searches

Overall, we've seen an upward trend in search volumes for major travel brands over the past two years.

Brand awareness & trust are crucial

Travel search data reveals how important brand awareness and trust are amid increasing uncertainty.

	Keyword	Volume	KD %
1	Love holidays	1.2M	57%
2	Jet2 holidays	823,000	54%
3	Tui holidays	823,000	43%
4	EasyJet holidays	550,000	52%
5	Jet 2 holidays	550,000	47%
6	Lastminute holidays	368,000	72%
7	Holiday Inn	246,000	53%
8	Holidays	246,000	96%
9	Cheap holidays	201,000	65%
10	Haven holidays	201,000	44%

Location keywords for "holiday"

Disneyland Paris tops the list of 'holiday' destinations

Disneyland Paris is the top destination included in "[location] holiday" queries with 90.5K monthly searches. This compares to 40.5K searches for "New York flights".

Keyword variations are crucial

These "[location] holiday" keywords reveal new insights and brands need to perform extensive keyword research with variations and long-tails (eg: "city breaks," "romantic getaways," etc.).

Lower search volumes vs branded keywords

Significantly lower search volumes for location-specific queries, compared to branded keywords for flight operators and travel agents.

VERTICAL LEAP

	Keyword	Volume	KD %
1	Disneyland Paris holidays	90,500	65%
2	Cape Verde holidays	60,500	48%
3	Tenerife holidays	60,500	58%
4	Benidorm holidays	49,500	59%
5	Dubai holidays	49,500	49%
6	Turkey holidays	49,500	60%
7	Amsterdam holidays	40,500	57%
8	Greece holidays	40,500	59%
9	Holiday Inn London	40,500	41%
10	Maldives holidays	40,500	51%

Keyword opportunity: “last minute holidays”

- 368k avg. monthly searches for “last minute holidays” in the UK
- Significantly up since pandemic
- Informational & commercial intent
- Keyword difficulty: 72%
- Avg. CPC of £0.77 in Google Ads

Flight booking sites by search volume

Expedia the top travel search platform in the UK

With 8.6 million monthly branded searches, Expedia is the top search/booking platform for UK travellers.

Big platform dominance

Expedia and Skyscanner generate a combined 14.7 million monthly branded searches between them – more than 10x the monthly searches for Google Flights and Kayak combined.

Brand names matter for airlines and agents

Despite the big platform dominance, the top airline brands and travel agents still generate huge monthly search volumes.

	Keyword	Volume
1	Expedia	8.6M
2	Skyscanner	6.1M
3	Emirates	4.0M
4	Ryanair	3.4M
5	EasyJet	2.7M
6	TUI	2.2M
7	British Airways	2.2M
8	Google flights	1.2M
9	Jet2	919,100
10	Kayak	301,000

Travel agents by search volume

Expedia dominance vs travel agents

Expedia's dominance in travel search is even more apparent when you pit it against the biggest travel agent names.

Travel agents need to know their strengths

More people are using travel agents in 2023 – in some cases, [ditching online platforms like Airbnb] – but agencies need to know their strengths and differentiate from online channels – eg: personalised services, refund policies, etc.

Catering to new travel demands crucial for travel agents

Travel agents that understand the changing demands of UK travellers can adapt and cater for them faster than the giant online platforms.

	Keyword	Volume
1	Expedia	8.6M
2	TUI	2.2M
3	Love Holidays	1.2M
4	On The Beach	886,700
5	Jet2 Holidays	714,500
6	Lastminute	246,000
7	Virgin Holidays	201,000
8	Hays Travel	201,000
9	First Choice	165,000
10	Secret Escapes	110,000

VERTICAL LEAP

The 5 stages of the travel booking cycle

VERTICAL LEAP

Stage 1

Inspiration

Inspiration is the key motivator in travel bookings and 19% of UK travellers say they regularly think about destinations.

Spark inspiration with paid ads and social posts - don't wait for travellers to take the first step.

Stage 2

Research

Users explore potential travel destinations in Google Search, YouTube and travel sites (agencies, airlines, comparison, etc.).

Promote locations and experiences in your content marketing strategy.

Stage 3

Decision

Travellers decide on destinations, dates and the most important elements of their trip that will determine booking choices.

Know your audience's priorities and provide clear information to help them make decisions.

Stage 4

Booking

Travellers decide to make key bookings (transport, accommodation, etc.) and who to make these bookings with.

Maximise brand awareness and search visibility across all relevant platforms.

Stage 5

Trip purchases

Travellers continue making purchase decisions (activities, tours, restaurants, etc.) throughout their trip.

Use location targeting to reach people travelling in your area with relevant offers.

VERTICAL LEAP

What Google wants...

Top ranking pages for flights

Skyscanner wins the top spot

Skyscanner shows the power of branded searches and strong relevance with flights.

No Expedia in the top 10 for "flights"

Despite beating Skyscanner for branded searches, Expedia doesn't rank in the top 10 for "flights" (it ranks in position 6 for "hotels").

High competition for authority scores and backlinks

Across the board, sites ranking in the top 10 perform extremely well with authority scores, backlink profiles and organic traffic volumes.

VERTICAL LEAP

	AS	Backlinks	Keywords	Organic traffic
1. Skyscanner.net	84	2.7M	5.9K	6.0M
2. Google.co.uk/travel/flights	80	18.3K	20K	1.2M
3. EasyJet.com	76	40.8K	36.2K	2.9M
4. Kayak.co.uk/flights	86	739.9K	2.7K	113.4K
5. Cheapflights.co.uk	90	467K	3.4K	113.4K
6. Booking.com/flights	54	125	3K	86.6K
7. Britishairways.com	86	826.1K	6K	2.3M
8. Jet2.com	82	159K	19.4K	1.2M
9. Tui.co.uk/flights	81	274.1K	17.1K	156.3K
10. Wizzair.com	88	619.3K	24K	1M

AS = Authority Score

Top ranking pages for cheap flights

Cheapflights.co.uk takes the top spot

Relevance and high quality scores help Cheapflights.co.uk take the top spot from Skyscanner for this competitive query.

The power of domain names?

Google insists keywords in domain names have no impact on rankings but here we have Cheapflights.co.uk taking position 1 for "cheap flights" and Hotels.com for "hotels".

Relevance, role and brand perception

The other explanation is that Cheapflights.co.uk and Hotels.com have extremely tight messaging, communicate their purpose in their brand name and make it 100% clear what their role is to customers (relevance).

VERTICAL LEAP

	AS	Backlinks	Keywords	Organic traffic
1. Cheapflights.co.uk	87	441.3K	3.4K	117.1K
2. Skyscanner.net	83	2.5M	5.8K	6.0M
3. Kayak.co.uk/flights	86	739.9K	2.7K	113.4K
4. Lastminute.com/flights	33	1.4K	2.7K	68.8K
5. Travelsupermarket.com/flights	49	293	3.2K	25.5K
6. Expedia.co.uk/flights	55	345	3.2K	69.1K
7. Kiwi.com/cheap-flights	63	40K	2.1K	8.6K
8. Trip.com/flights	49	55	1.6K	9.6K
9. Edreams.co.uk/cheap-flights	42	33	1.2K	7.3K
10. Momondo.co.uk	91	1.1M	2.1K	75.2K

AS = Authority Score

Top ranking pages for hotels

Relevance defines the top 10 for "hotels"

The top 10 shows how important relevance is for travel bookings. Travellers associate Hotels.com and Booking.com with hotels, Skyscanner with flights, etc.

Is relevance hurting Expedia in the SERPs?

Expedia trying to be an all-in-one travel platform could partly explain its struggles to rank for primary keywords (also, note its low authority score).

Booking.com and Kayak both in the top 10 for "flights" and "hotels"

Booking.com and Kayak do what few travel brands manage by ranking in the top 10 for both "flights" and "hotels".

	AS	Backlinks	Keywords	Organic traffic
1. UK.hotels.com	70	29.3K	3.1K	141K
2. Booking.com	66	944.6K	2.2K	862K
3. Lastminute.com/hotels	54	1.3K	2K	150.8K
4. Tripadvisor.com/hotels	57	230	494	20.1K
5. Trivago.co.uk	86	5.1K	9K	521.2K
6. Expedia.co.uk/hotels	53	1.5K	1.5K	35.4K
7. Premierinn.com	80	16.1K	25.9K	1.8M
8. Kayak.co.uk/hotels	90	758.9K	906	25.8K
9. Laterooms.com	73	103.5K	4K	84.8K
10. NH-hotels.com	78	25K	8.3K	18.3K

AS = Authority Score

Top ranking pages
last minute holidays

Lastminute.com takes position 1

Again, we see a keyword match in the top-ranking website, but – once again – the brand name perfectly describes the company's role and key selling point.

Low authority scores

With low authority scores across the board, there's plenty of room for movement outside of position 1.

E-E-A-T and YMYL

Given the last-minute nature of this query and the increased financial risk, E-E-A-T and YMYL are crucial for brands targeting this keyword.

	AS	Backlinks	Keywords	Organic traffic
1. Lastminute.com/holidays	70	1.7K	2.4K	445K
2. Tui.co.uk/holidays/last-minute	35	692	2.4K	145.7K
3. Loveholidays.com..../last-minute	28	257	3.2K	25K
4. Travelsupermarket.com.../last-minute	23	265	3.0K	18.1K
5. Jet2holidays.com/last-minute-holidays	63	345	3.6K	20.9K
6. Onthebeach.com.../last-minute-holidays	24	259	4.4K	13.9K
7. Holidaypirates.com	18	204	2.7K	9.2K
8. Firstchoice.co.uk..../last-minute	20	19	1.6K	10.9K
9. travelzoo.com.../last-minute	22	95	496	903
10. parkdeanresorts.co.uk... .../last-minute-holidays/	20	125	1.2K	7.5K

AS = Authority Score

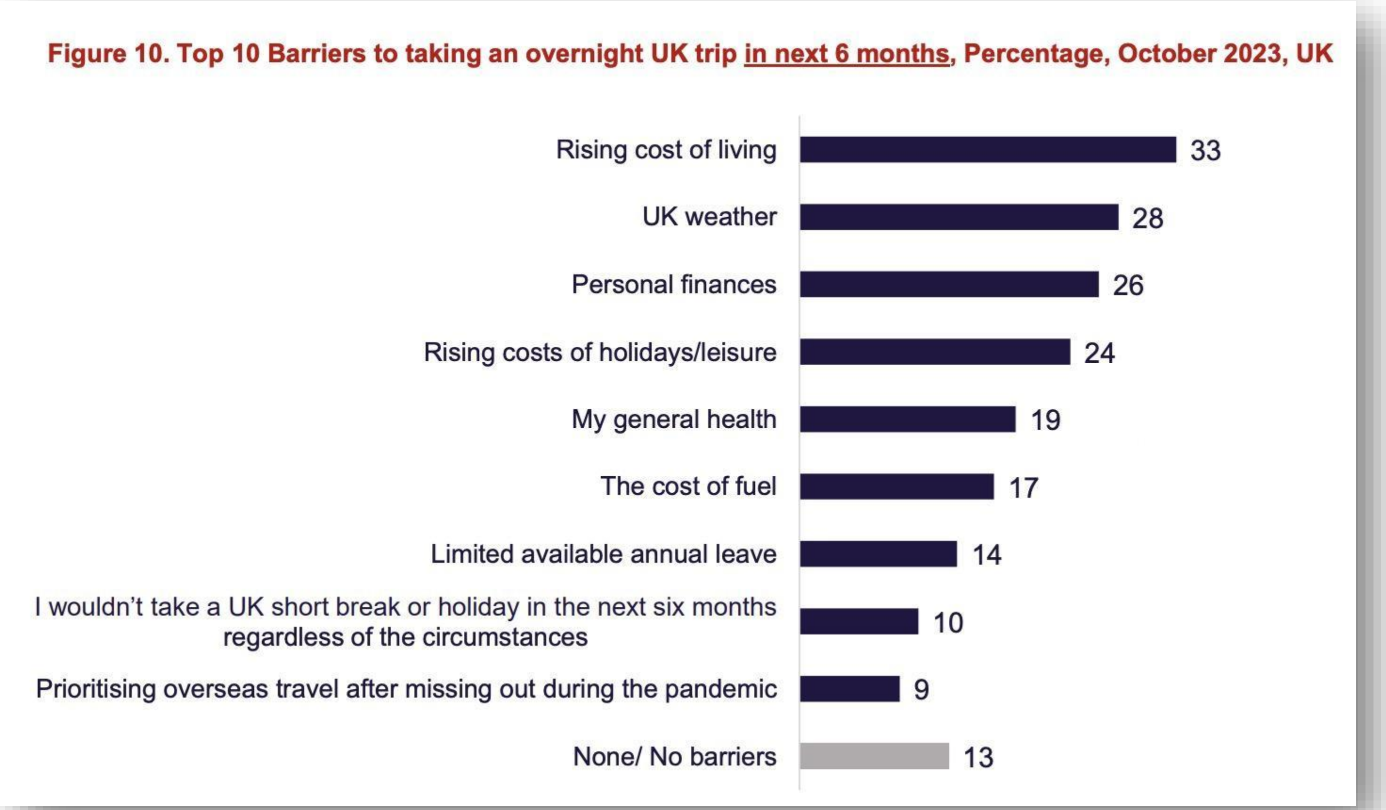
What travellers want

Cost-of-living crisis replaces Covid-19 concerns

While the travel industry is still recovering from the impact of Covid-19, the pandemic is no longer a significant concern for UK travellers.

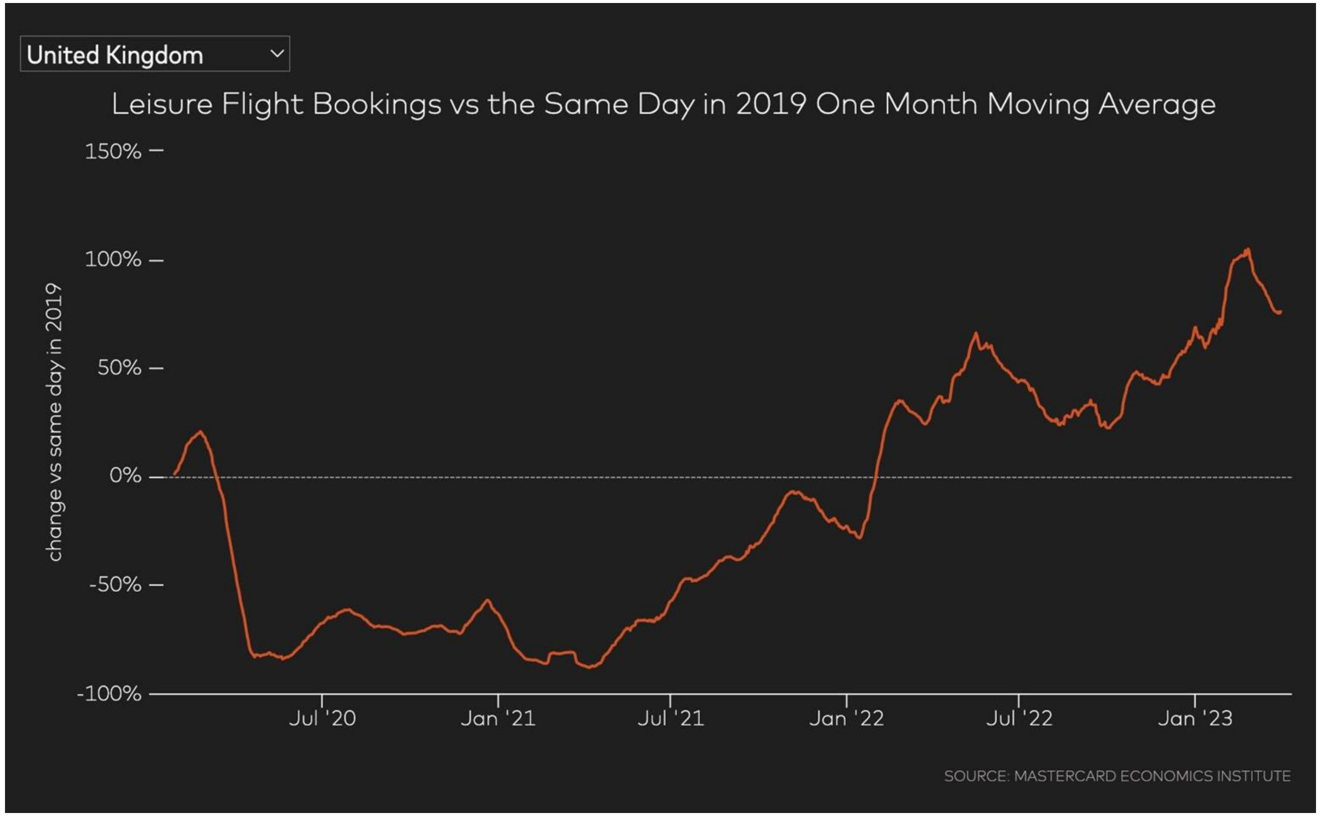
The latest insights from Visit Britain (October 2023) confirm the cost-of-living crisis is the top concern for travellers (33%), followed by the UK weather (28%) and personal finances (26%).

With 46% of adults thinking the worst is still to come, 66% say they're either being cautious or cutting back on spending. Only 13% say they currently face no travel barriers with 24% citing rising costs and another 17% specifying fuel costs as a barrier.



Brits still travelling, despite economic challenges

- Mastercard data shows UK leisure flights are well above 2019 levels in 2023.
- 78% plan to take a domestic trip in the next 12 months, 60% plan to travel overseas and 67% took at least one domestic trip in the past 12 months. Visit Britain
- Although many are cutting back on non-essential spending, travel and tourism tops the list of spending priorities for adults in the UK – for the third year running. Phocuswright
- 80% of UK travellers plan to take the same number, if not more, trips abroad in 2024 compared to 2023. Skyscanner



Short-term financial worries, long-term climate concerns

67% of UK travellers rethinking travel plans due to climate concerns

Two-thirds say the experience of a scorching-hot summer last year has changed the way they are thinking about when and where to travel. InsureandGo

71% think popular parts of the Med will be too hot by 2028

Seven in 10 UK adults believe many popular holiday destinations in the Mediterranean will be too hot to visit by 2028. InsureandGo

57% consider sustainability when booking

Among those taking multiple trips per year, 57% say they consider sustainability while 27% who only take one holiday a year say it's their top priority.

UK travellers' response to last year's heatwave			
67%	44%	24%	71%
Rethinking future travel plans	Thinking about changing travel season	Thinking about changing locations	Think parts of the Med will be too hot by 2028

Travellers have different priorities in 2024

- Travellers are looking to escape the stresses of reality back home. Booking.com
- 65% of British travellers are prioritising new experiences in 2024, 81% exploring the unknown and 64% trying out local cuisine. Hilton
- More Brits are looking to escape the heat with cool getaways (56%) and water-centric trips (36%).
- Interest in solo trips is increasing (24%) as organising groups trips becomes more challenging – partly due to financial implications.

What travellers are looking for						
85%	81%	64%	56%	48%	36%	24%
New experiences	Exploring the unknown	Local cuisine	Cool getaways	Local customs & tradition	Water-centric trips	Solo trips

Desktop vs. mobile bookings 2023

Users browse on mobile but convert on desktop

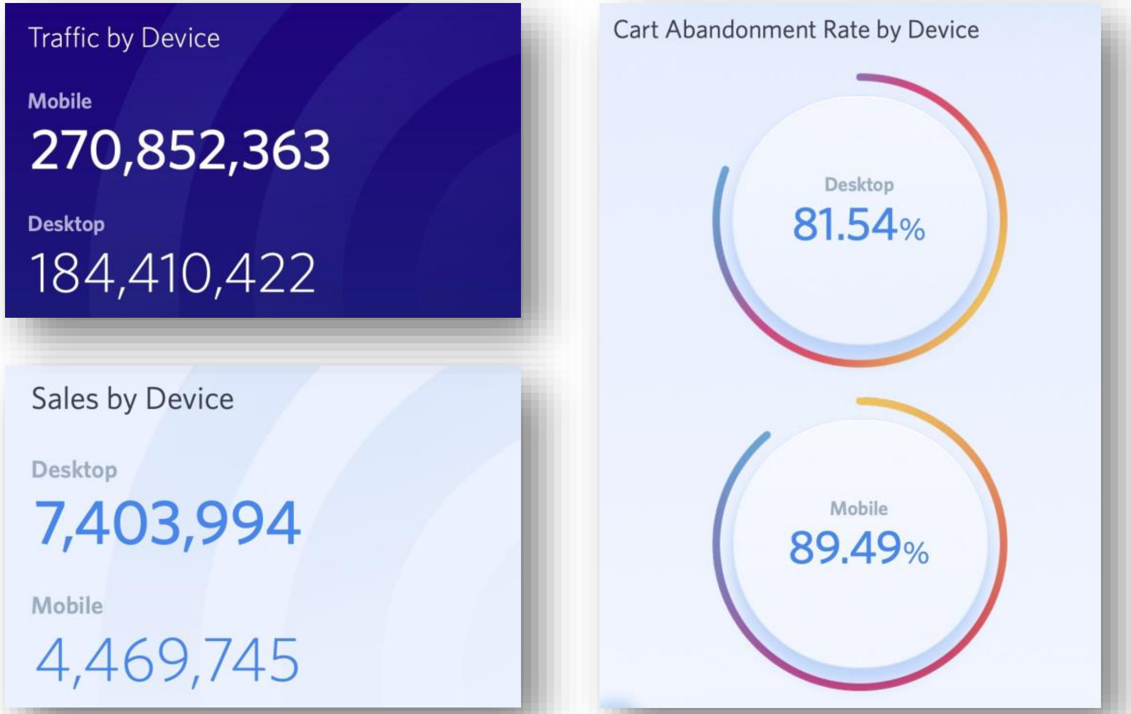
Although desktop accounts for 62.5% of online sales, mobile accounts for 60% of online traffic.

Desktop abandonment rates -8% lower than mobile

The average cart abandonment rate on desktop for travel bookings is 81.54% and 89.49% on mobile.

Users spend 40% more on desktop bookings

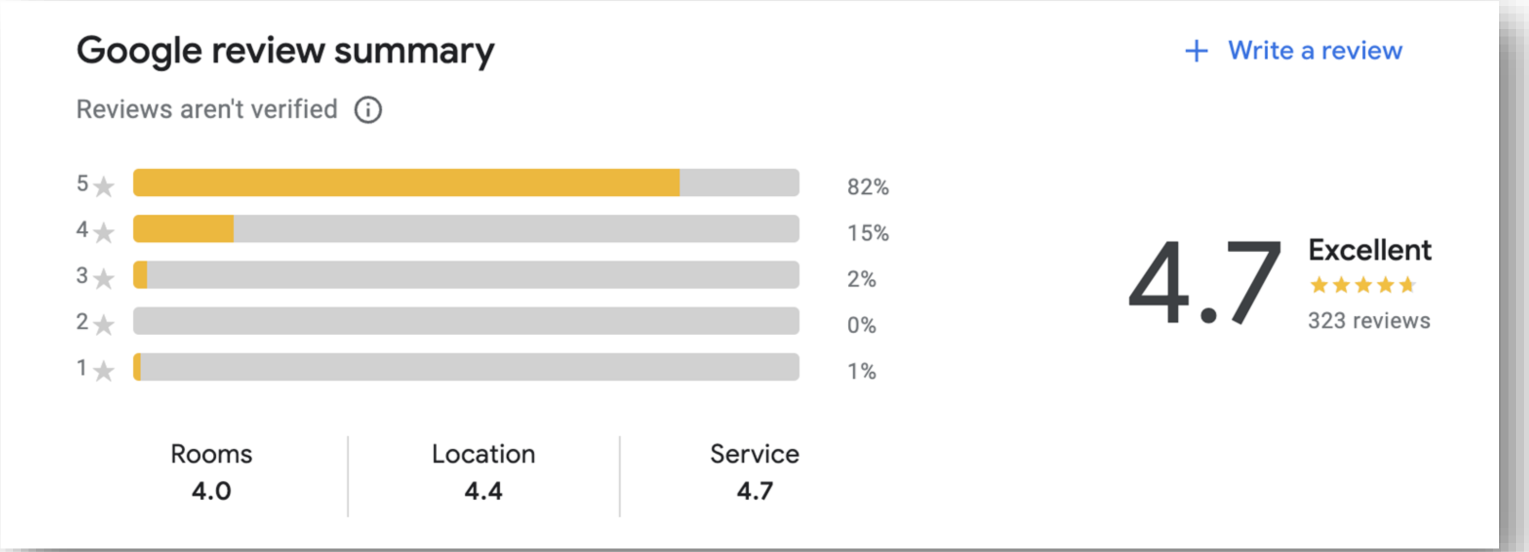
Travellers spend an average of 40% more when they book on desktop than mobile.



Source

96% of travellers read reviews before booking hotels

- According to insights from Revinate, 96% of travellers consider reviews when choosing hotels.
- 79% read between 6-12 reviews before making a booking decision.
- Travellers want to book with confidence and social signals are crucial if they're making their own bookings (not through an agent).



Source

Next steps for travel companies

Inspire

Use paid social and retargeting campaigns to spark travel inspiration.

Brand awareness

Brand names count in travel marketing so build awareness across search and social.

Search coverage

Maximise visibility in Google Search and other relevant products (YouTube, Google Maps, Google Flights, etc.) as well as third-party systems like Skyscanner.

Influence bookings

Travellers are open to influence so use content marketing and ad campaigns to turn inspiration into bookings.

Boost confidence

Confident travellers are happy travellers so boost confidence across the customer journey through reviews and protection policies.

Search data

Use search data to understand what consumers really care about. You can also pick up on early trends to gain visibility before your competitors.

If you need help getting more bookings,
contact us today!

You can also learn more
about our travel expertise here.

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