

# Harvest Digital

## Booking holidays and flights online

What is the opportunity for  
travel companies selling  
online?

User research conducted across the Adviva network  
by Nielsen/Netratings, February 2007  
Mike Teasdale Planning Director, Harvest Digital

# The online travel habits of UK consumers

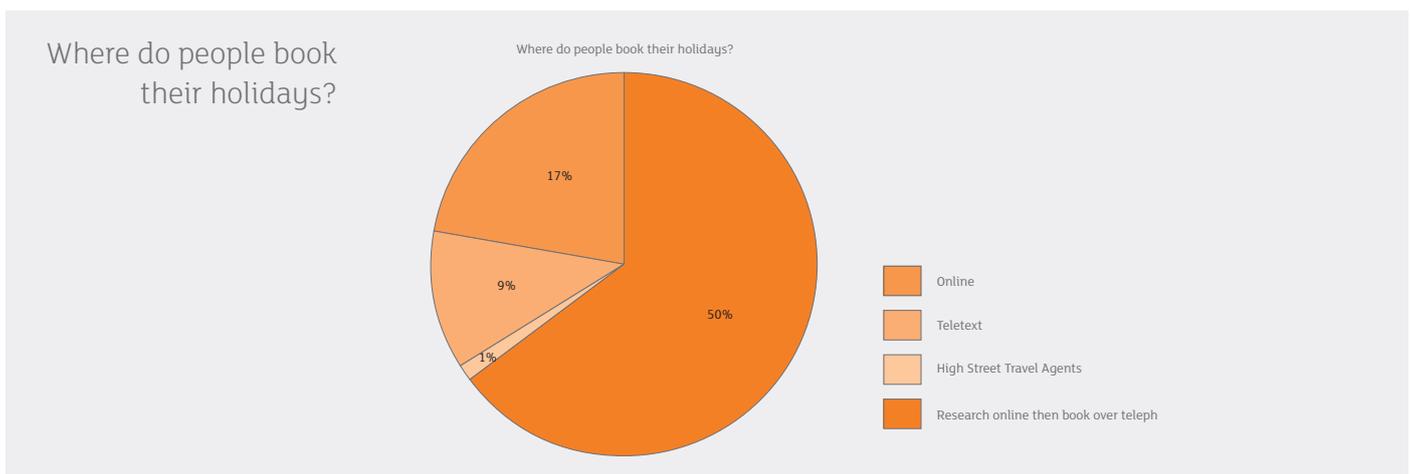
- 55% of internet users book holidays online – only 7% book on the high street
- Two thirds of internet users take two or more holidays a year
- “Silver surfers” enjoy more regular holidays and late bookings online.

It is fair to say that the Internet has revolutionised the way that we buy travel services like flights and holidays. The Internet allows travel companies to publish much more detailed information about resorts, including video. Price comparison services make it easy to find the cheapest prices on flights and accommodation. And the rise in user review sites means that we can find out directly from previous holidaymakers exactly what it was like to holiday in a particular location.

All this means that the average Internet user now has more information at their disposal than a typical travel agent could access just five years ago. So it's no surprise that one major finding of our user research was that more than half of all Internet users now book their holidays online.

The research - conducted by Nielsen//NetRatings on users of the Adviva advertising network – also shows that only seven per cent of our sample research and buy their holidays from travel agents on the high street and one per cent book on Teletext.

A good proportion of offline purchases clearly started with online research. Nine per cent of internet users book their holidays on the high street after researching online and a further 17 per cent research holidays online then book over the telephone - proving that the internet is the most important channel for researching and buying holidays.



But whilst most people are performing some searches with Google, very few of our sample only uses Google. In fact only 24% of respondents were only using a single search engine exclusively; most users habitually use more than one search engine and 20% of our sample regularly uses four or more search engines.

So whilst Google clearly dominates the UK search landscape at present, these statistics suggest that that dominance will need to be continually earned in terms of perceived better performance. Any product improvements by their rivals would  
A beach holiday is the most common type of holiday booked online followed by a long-haul trip, cruise or fly-drive whilst activity holidays are more popular on the high street.

Two thirds of online shoppers usually take two or more major holidays (one week or more) a year and a quarter have three or more holidays.

Older people are particularly likely to take regular holidays with 23% of people aged 55 and over taking three holidays per year compared with just 16% of internet users overall. This group is also likely to book a holiday at the last minute: 28% of people aged over 55 booked their holiday a month or less before departure, compared with 25% of under 24's and 18% of internet users overall. Booking last minute trips abroad may be more associated with young urbanites, but it seems like it is time-rich older people who are holidaying more often and more spontaneously.

Commenting on the research, Mike Teasdale Planning Director at Harvest Digital explains, 'As the first truly global medium, the Internet has always had a special affinity with the travel industry and powerful new entrants are rumoured to be entering the market, most notably Google with their long-rumoured Google Travel portal. Obviously offline media still has a vital role to play in the marketing mix, but once an online consumer is interested in a specific destination or holiday, they use the Internet to research and buy.'

The research was conducted through Adviva, the largest CPM focused network in the UK, which reaches 19.7 unique users with seven million impressions a month in the travel sector. 863 completed questionnaires were collected.

Fiona McKinnon, European Corporate Development Director at Adviva comments, 'Our research reveals the degree at which the internet has changed our traditional means of booking and researching our holidays. The most noticeable shift is from the high street with more than three quarters of holidays now researched or booked online. This is reflected in the high number of people booking late deals and taking more holidays than the average British consumer. The easiest, quickest and most responsive way for travel brands to influence internet users in their holiday decision making process is to advertise online.'

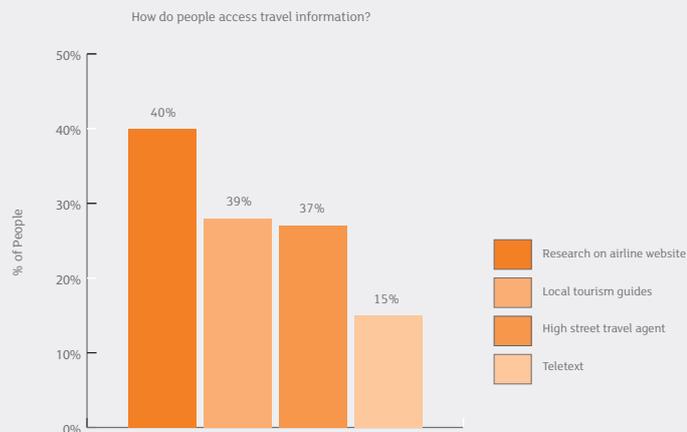
Alex Burmaster, European Internet Analyst at Nielsen//NetRatings, adds, 'The travel industry provides a wonderful reminder, if anyone still needed one, of how integral the Internet has become in the life of today's consumer. The Internet is now officially a mainstream form of media and companies who still believe it can only form a 'niche' part of any consumer-focused strategy will soon find themselves marginalised as the 21st century progresses.'

Almost half of internet users book holidays based on recommendations from friends and families while a third of people read the travel articles in magazines and newspapers, 15% use Teletext and a one in five respondents watch holiday programmes on TV.

Almost two thirds of internet users also use a search engine and other online sources also rate highly: 40% of people research on airline websites, over a third use travel agent websites and local tourism guides such as VisitScotland.com are a resource for 28% of internet users.

27% of people use their high street travel agent as a source of information; far higher than the number of people who book in-store. This is another worrying sign for the high street, as consumers collect brochures offline only to book their holiday over the Internet.

## How do people access travel information?



60% of those who use a search engine book four or more major holidays per year along with 38% of magazine-readers which contrasts with just 13% of those who visit their local travel agent.

Mike Teasdale from Harvest Digital adds, 'Consumers are telling us that word of mouth is very important in terms of choosing a potential holiday. In the past, that would have been a casual chat over a pint: now it seems that the online equivalent is sites like TripAdvisor.com where an entire community are posting tips and recommendations about good places to go.'

Online travel booking and research is even more common for 25 - 34 year olds, and for people booking within four weeks of their departure date. On both cases 68% of people would book directly on the Internet. The survey also revealed that three quarters of people book their own holidays with no major differences in the travel booking habits of men and women. The only group with a high number of respondents saying they make or influence the holiday decision but somebody else buys was in the 16-24 age group.

## About the research

Surveys were delivered as a pop up across the Adviva network to Test (exposed) and Control (non exposed) cells. 863 questionnaires were completed in full by male and female respondents of all ages in September 2006.

### About Harvest Digital

Harvest Digital is a full-service online marketing agency specialising in media planning and buying, search marketing and online marketing creative.

Formed in 2001, the company is privately owned by staff. Based in London, clients include Tesco, Auto Trader, Thomas Cook, 3M, Tiscali and Shelter.

[www.harvestdigital.com](http://www.harvestdigital.com)

## About Adviva

Adviva is the largest CPM focused network in the UK. It places a strong emphasis on building a quality content-driven network providing advertiser's confidence in results in a brand safe online environment. Adviva's comprehensive suite of advertising targeting options include content and channel targeting, behavioural targeting in the form of user profiling as well as keyword contextual targeting.

In order to ensure the quality of the Adviva network Adviva have developed an in-house keyword blocking technology which prevents adverts from showing on pages that have urls containing inappropriate content. Adviva are the only network in the UK to use this technology as standard across all advertising campaigns.

Adviva is the only UK company to offer proprietary advance targeting technology combined with a comprehensive quality controlled network. Its experience teams ensure the best in customer service through a consultative account management approach.

Established in 2000 and headquartered in London, Adviva expanded in the French and German markets in 2005 with offices in Paris and Munich. It was named the UK's 25th fastest growing technology company in the Sunday Times Tech Track 100 League 2006.

## About Nielsen NetRatings

Nielsen//NetRatings is a global leader in Internet media and market research, providing companies with valuable insight into their businesses. Nielsen//NetRatings offers the industry's premier source of actionable Internet data and digital media research on Website usage, online advertising, consumer attitudes and competitive analysis.