



Exploring travel in 2015

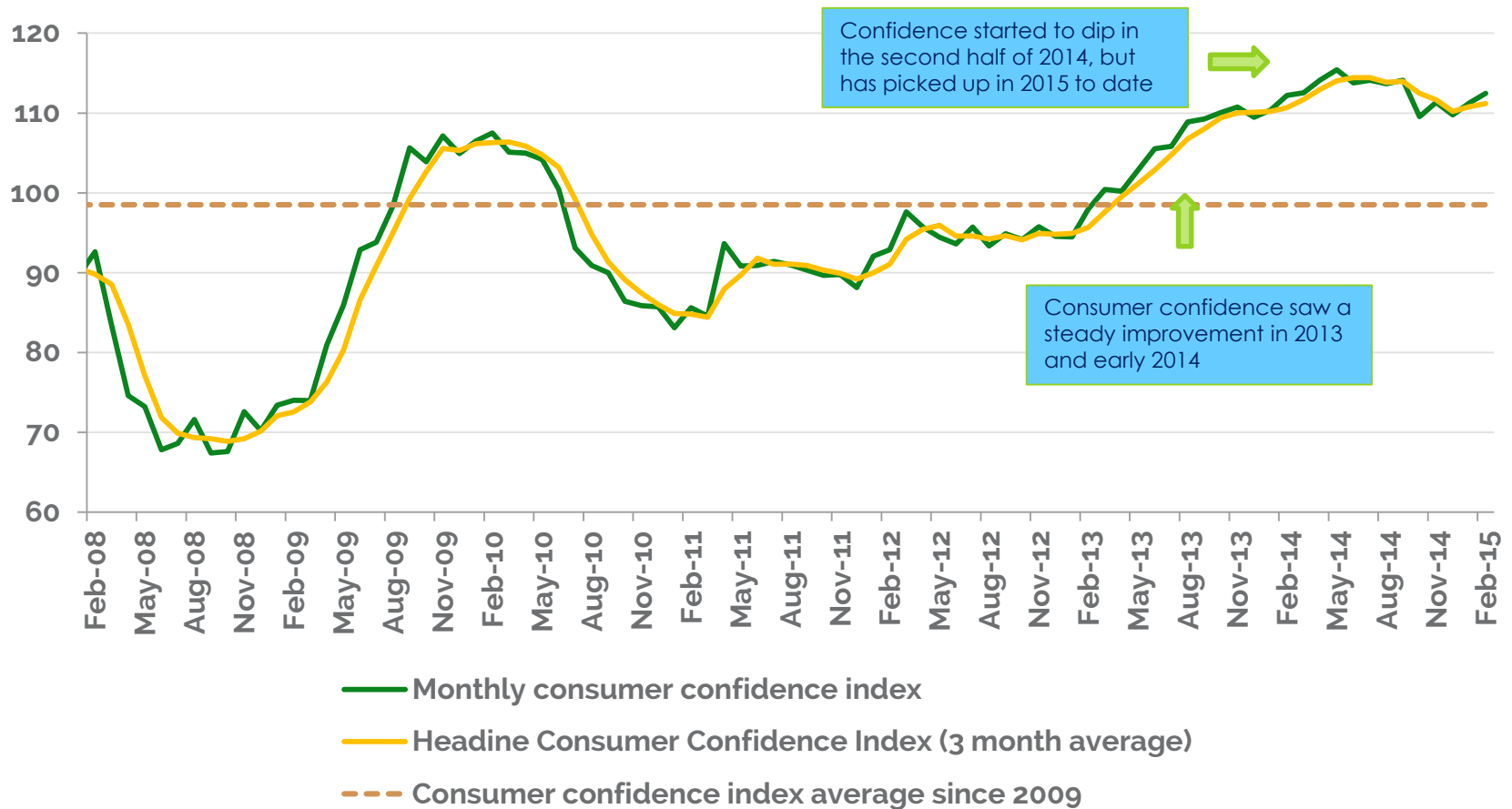
Suzanne Devai, Research Director



How does an improving economic outlook impact on the travel sector?

Consumer confidence continues to pick up overall, despite a small dip at the end of 2014

YouGov / Cebr UK Consumer Confidence Indicator (Index runs from 0-200 where 100 is neutral)

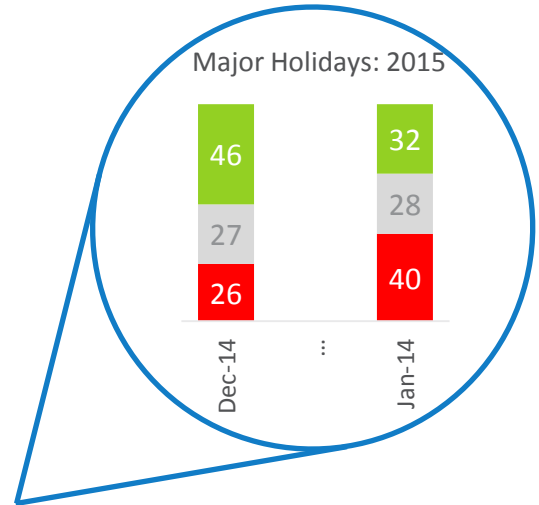
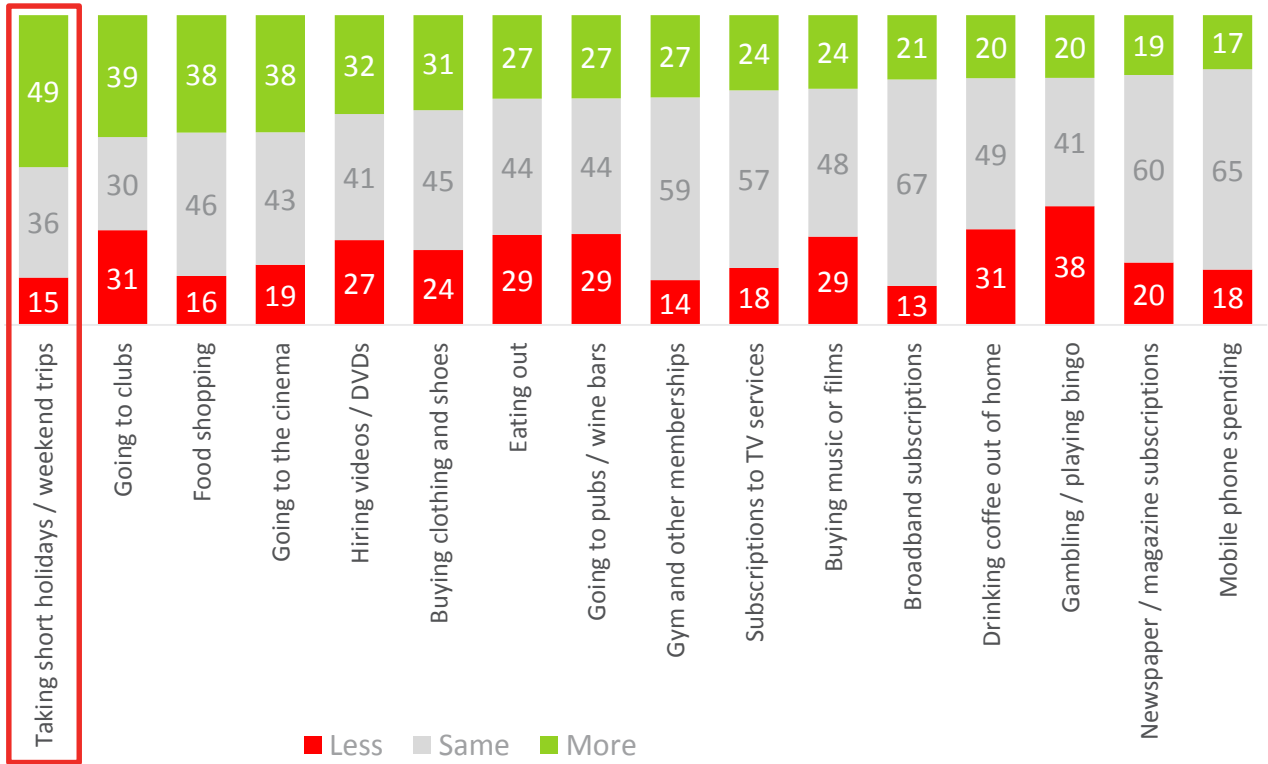


Source: YouGov/HEAT Tracking. The HEAT Index (YouGov Consumer Confidence score) is derived from consumer sentiment on 4 metrics (household financial situation, job security, home prices and business activity) measured retrospectively and prospectively.

... this may be impacting on holiday planning, with more positivity towards short breaks than major holidays

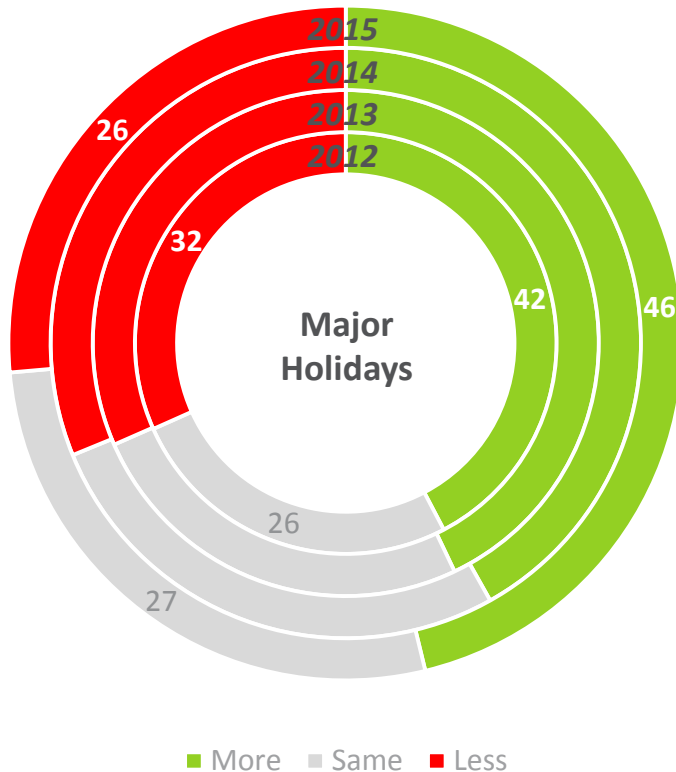


Spending Expectations 12 months from now



How has this changed over the last few years?

Spending Expectations
in Coming Year



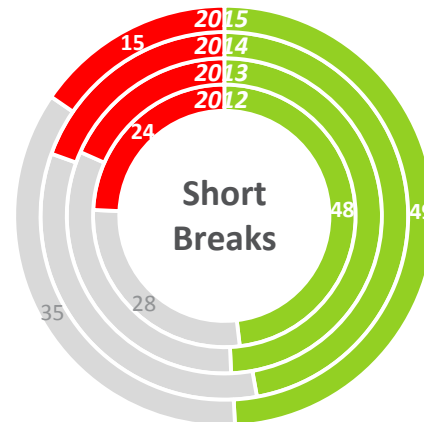
Major Holidays:

Expect to Spend in 2015

£2,303

Spent in 2014

£2,112



The vast majority plan to take some sort of holiday this year



Of UK adults expect to go on a holiday in 2015

Regular YouGov panel screening via our Oracle means we can pre-identify specific and even niche samples, leading to faster and more efficient sampling and fieldwork

In February we already identified a pool of 32,248 panellists who plan on going on a holiday in 2015

The background features a large, faint graphic of two hands holding a globe. The hands are light grey, and the globe is a darker grey. The text is overlaid on a semi-transparent grey circle in the center of the hands.

YouGov

... with city breaks and visiting family/friends particularly popular

Most popular holidays planned for 2015



Pre-identified on our panel:

→ 9,685

→ 11,052

→ 11,008

→ 9,021

We also identified consumers planning to take more niche holidays:



→ 4,929 pre-identified

→ 2,374 pre-identified

→ 1,182 pre-identified

Source: YouGov Oracle

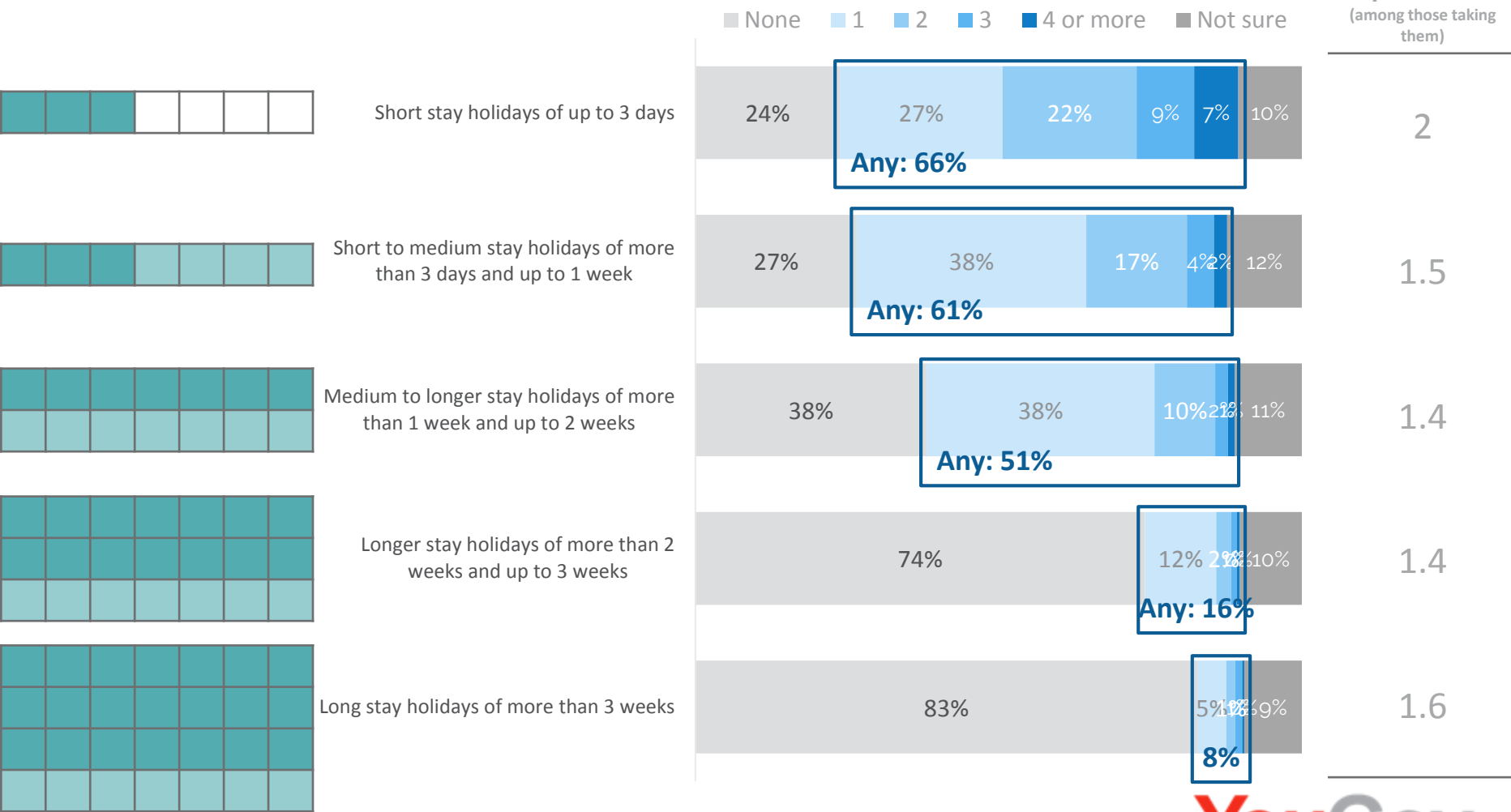
Time period: February 2015

Base: UK Nat Rep

Which, if any, of the following types of holiday are you planning on going on (or have already been on) in 2015?

There appears to be a tendency for more frequent, shorter holidays

Number of times they plan on taking different kinds of holidays in 2015





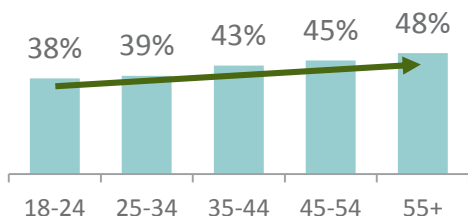
When do people book holidays?

How organised are we as a nation? What is the true impact of key booking dates?

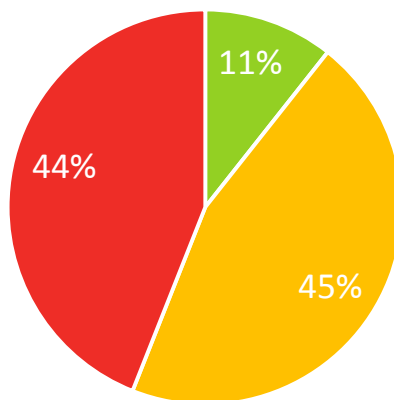
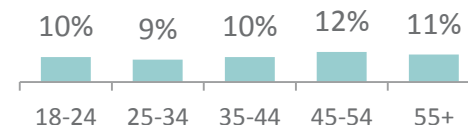
Ditch the stereotypes – younger travellers are more organised?



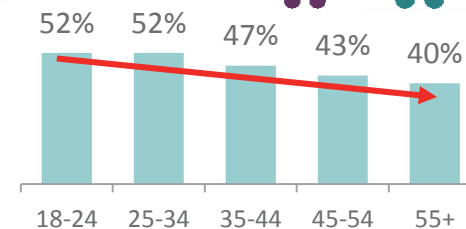
Impulse bookers



Early bookers



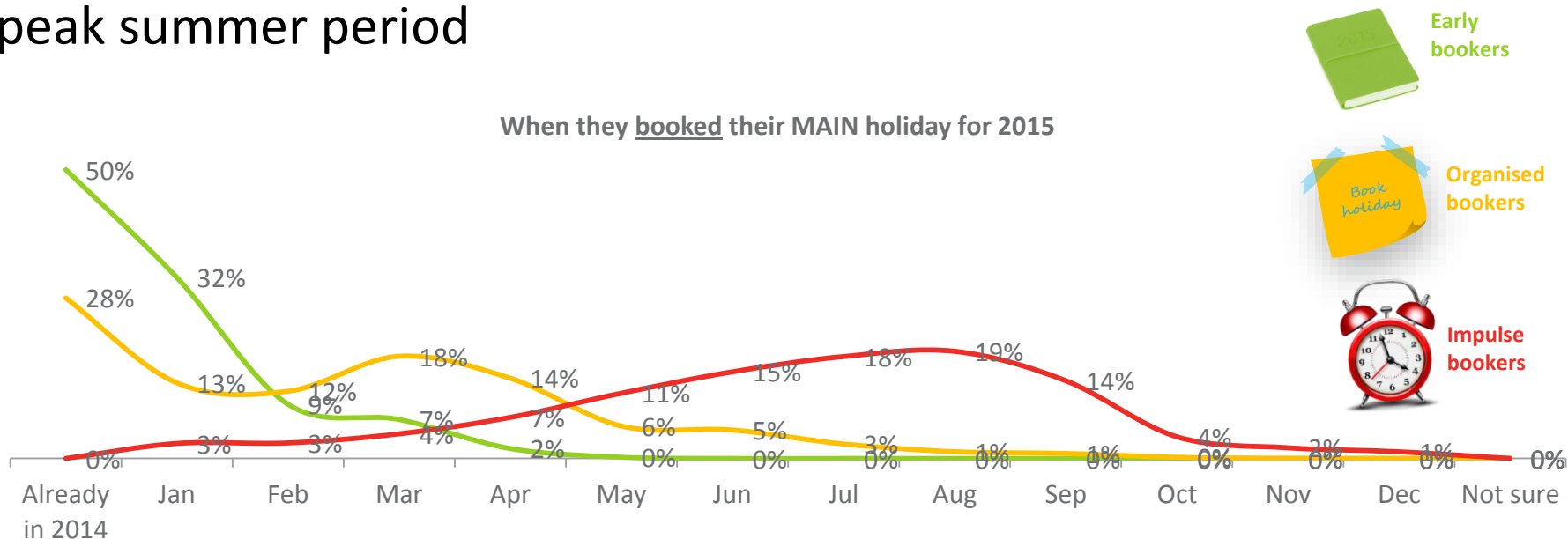
Organised bookers



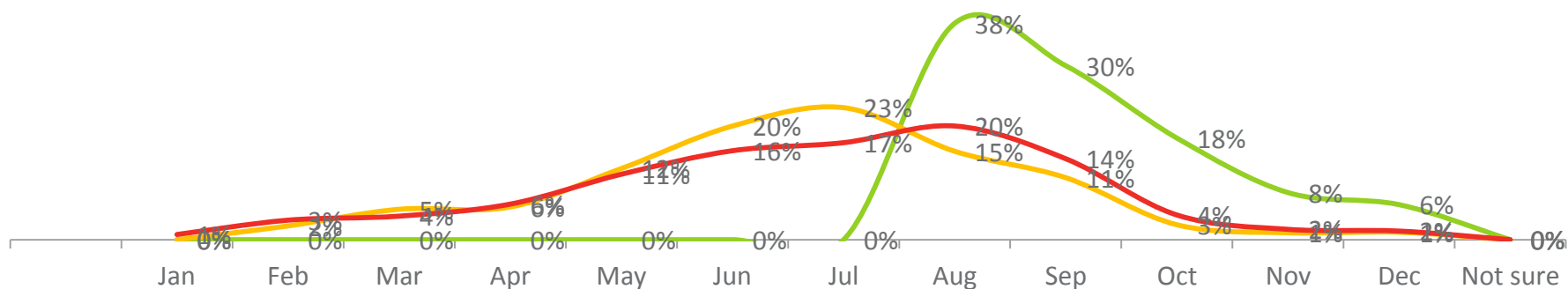
- Early bookers (7+ months ahead)
- Organised bookers (3-6 months ahead)
- Impulse bookers (1-2 months ahead)

YouGov

Early booking is largely dominated by the need to go away in the peak summer period



When they will be going on their MAIN holiday in 2015



Source: YouGov Oracle
 Time period: February 2015
 Base: all taking or intending to take a holiday in 2015
 When will you, or have you, been making the booking for your MAIN holiday in 2015 (i.e. booking the flights/trains/hotel etc.)?
 When are you planning on going on your MAIN holiday for 2015 (or when did you go)?



The return to work after the festive season is just one part of the booking story

'MISERABLE MONDAY' LEADS TO SURGE IN HOLIDAY SEARCHES

Searches for flights and holidays rocketed yesterday as people who returned to work after the long Christmas break started looking for their next break, said British Airways.

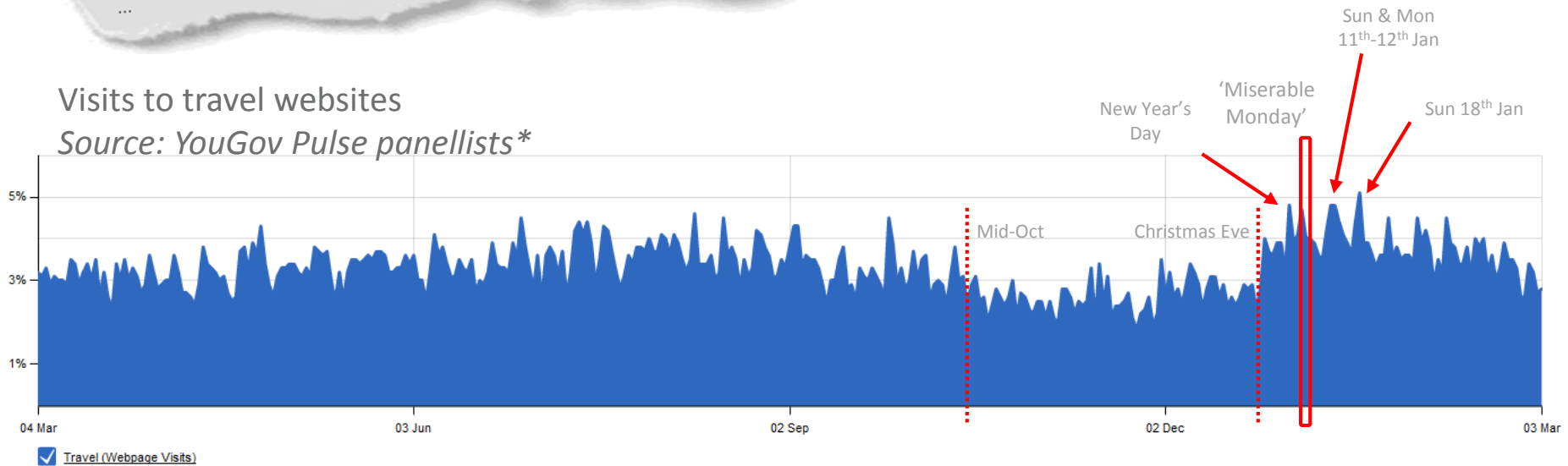
It claimed views on the BA website were up 68% on the first day back to work last year, peaking at 12.30 noon. The top searches were to the best-known destinations in the US, Canada and Asia.

Source: travelmole.com



Visits to travel websites

Source: *YouGov Pulse panellists**



YouGov

Analysis of visits to travel websites show the role played by review sites

Website	Total Visits	%
thomson.co.uk	1,784	14.6
expedia.co.uk	1,615	13.3
skyscanner.net	1,320	10.8
thomascook.com	1,143	9.4
travelrepublic.co.uk	831	6.8
trivago.co.uk	741	6.1
travelsupermarket.com	609	5
jet2holidays.com	515	4.2
monarch.co.uk	466	3.8
lowcostholidays.com	464	3.8
firstchoice.co.uk	438	3.6
onthebeach.co.uk	381	3.1

Website	Total Visits	%
britishairways.com	1,947	33.1
easyjet.com	1,670	28.4
ryanair.com	798	13.6
virgin-atlantic.com	646	11
jet2.com	410	7
flybe.com	394	6.7

Website	Total Visits	%
Hotels.com	376	51.4
Laterooms.com	317	43.4
Lastminute.com/hotels	122	16.7
Superbreak.com	115	15.7

Website	Total Visits	%
tripadvisor.co.uk	2,097	61.7
telegraph.co.uk/travel	390	11.5
dailymail.co.uk/travel	339	10
theguardian.com/travel	287	8.4
independent.co.uk/travel	104	3.1

Premier Inn and Travelodge most frequently visited hotel chains



Who takes what kind of holiday?

Using YouGov Profiles data to provide an overview of different consumer groups

Profiling the package holiday seeker



Characteristics

More likely* to:

- speak no foreign languages
- enjoy relaxing on a beach
- be influenced by TV advertising and use TV as main source of news
- shop at Morrisons

Attitudes

More likely* to:

- enjoy going to the pub for a drink
- enjoy going to trendy restaurants and bars
- find debt stressful and consider themselves good at saving up for things they want
- enjoy seeing favourite celebrities in advertising
- consider it important to be insured for everything

Brands



Websites



* compared to a nationally representative sample

Source: YouGov Profiles

Time period: snapshot taken February 2014, data collected throughout previous 12 months

Base: formulated from the question 'Thinking about your last holiday, how was it booked?' (Answer: "Package booking - both transport and accommodation were booked together")

YouGov

Profiling the luxury holiday seeker



Characteristics

More likely* to:

- be AB social grade, aged 35-44, married no children, work full-time
- be influenced by radio advertising, outdoor and print magazines
- enjoy reading lifestyle and food/cooking magazines
- own an Apple device and have Sky
- have a Tesco Clubcard and a myWaitrose card

Attitudes

More likely* to:

- seek out good quality products and don't mind paying extra for them
- manage their finances well and look for profitable ways to invest
- take an interest in fashion
- consider it important to seize opportunities
- expect adverts to entertain
- exercise regularly, eat healthily and don't allow family to eat junk food
- check product reviews before buying

Brands



Websites



* compared to a nationally representative sample

Source: YouGov Profiles

Time period: snapshot taken February 2014, data collected throughout previous 12 months

Base: formulated from the question: 'Thinking about holidays in general, to what extent do you agree or disagree...?' (Agree that "I book luxury accommodation when possible")

About YouGov



YouGov

Who are we and what do we do?



Be empowered with your own targeted research that goes deep on your challenges and big on solutions.



Make your arguments stronger and decisions easier with a continuous feed of data market intelligence.



With over 600,000 panellists we can target specific attributes for customer requirements.

YouGov

From big data to the niche groups – we can find your audience

- We are continually collecting data on each of our c.600,000 panellists to build an ever-increasing bank of knowledge. We know far more about them than simply their answers to your specific questions
- By carrying out continuous pre-screening we can identify the number of people who meet certain criteria – so we know if it's feasible to interview niche audiences and low incidence groups
- We don't need to go out looking for respondents, meaning we can significantly reduce the time and costs associated with free sourcing respondents.



...for example we know we have:

- **c.32,200** consumers who plan on going on a holiday in 2015
- **c.41,000** who like to take beach holidays
- **c.41,000** who like to take city breaks
- **c.13,000** who do all their holiday booking online

YouGov's custom research and consulting services provide a 360° perspective on your market, your brand and your customers



YouGov Consulting consists of sector specialists supported by our data products, plus custom quantitative and qualitative analytics.

