

What's Captifying the travel industry?

In partnership with



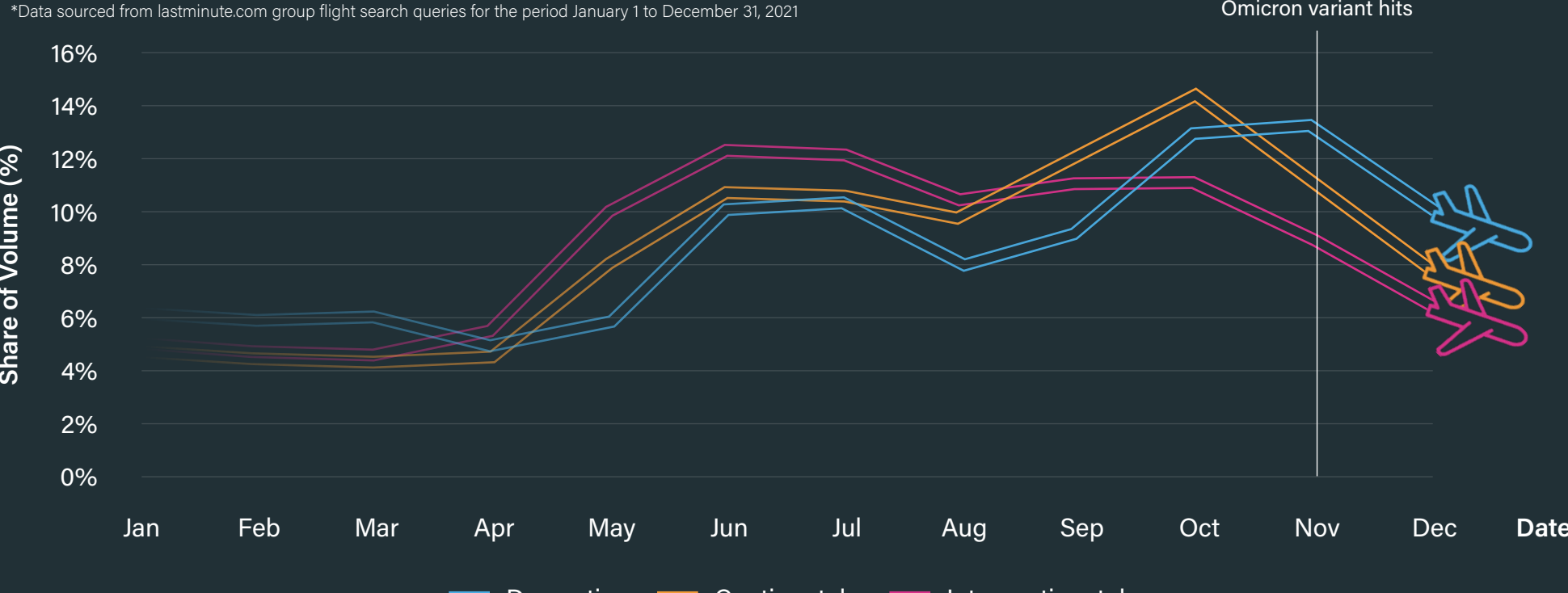
2022 is set to mark the long-awaited 'take off' for the global travel industry. Captify and Forward (the media & marketing arm of lastminute.com, the European Travel-Tech leader in dynamic holiday packages) have partnered to combine their unique data sets of onsite search and transactional booking data to reveal trends across the European and UK travellandscape in 2022—uncovering shifts in traveller behaviours and emerging audiences that brands can engage with.

Continental trips led traveller search interest across 2021

According to data from Forward, consumer travel interest rose throughout 2021 across continental, intercontinental, and domestic trips until rumours of the Omicron variant hit in November and travel restrictions started to be imposed once again. Top routes data reveals **continental trips** were the major preference of both European and UK travellers across 2021, followed by overseas travel and exploring their own country.

Top routes (continental, intercontinental, domestic) search trend—Europe

*Data sourced from lastminute.com group flight search queries for the period January 1 to December 31, 2021



Which destinations drove interest among European travellers?

*Data sourced from lastminute.com group flight search queries for the period October 1 to December 31, 2021

Top countries Q4 2021



Across all of 2021, **Spain** and **Italy** consistently featured as the top two destinations for travellers. Similarly, two of the top 3 cities are in **Spain**.

Top cities Q4 2021



UK Spotlight

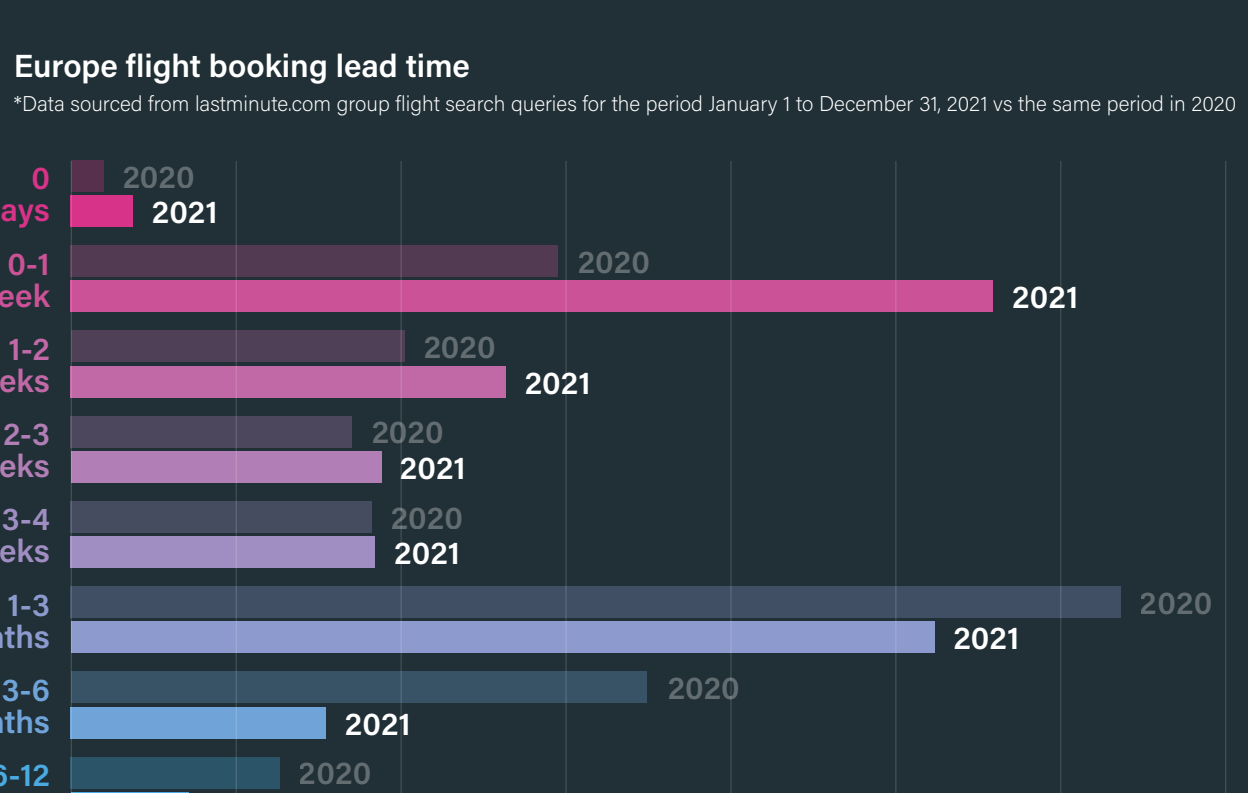
Consistent with Europe, **Spain** was the most searched for country across three quarters in 2021, while Dubai was one of the top searched cities.

Ever-changing restrictions triggered last-minute trips in 2021

European travellers took less time booking their holidays in 2021—with flight bookings made up to 2 weeks in advance growing from **25%** to **42%** of total flight bookings. In addition, both markets saw similar trends around last-minute getaways, with **62%** of European travellers and **59%** of UK travellers opting to book flights with less than a month's lead time.

Europe flight booking lead time

*Data sourced from lastminute.com group flight search queries for the period January 1 to December 31, 2021 vs the same period in 2020



Easing of restrictions boosted European flight searches and bookings in 2021

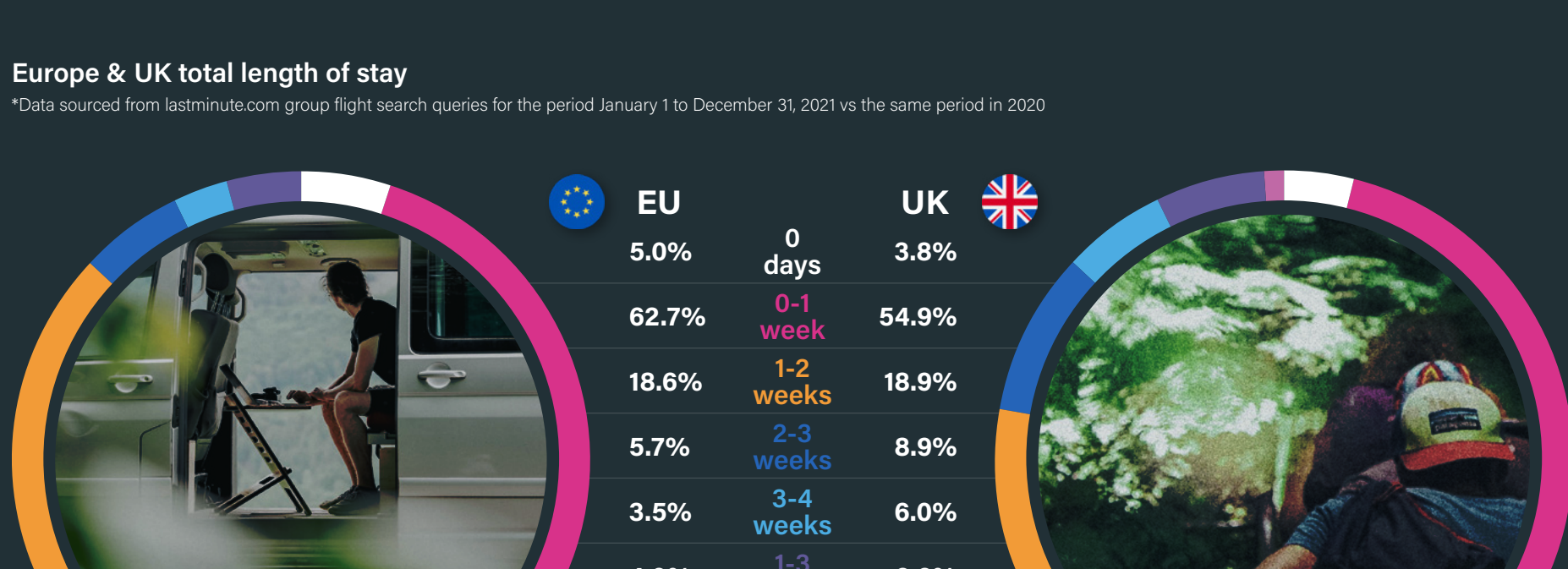
April to June saw flight searches and bookings surge when restrictions were eased across Europe—with a **237%** YoY increase in flight searches and bookings climbing **524%** YoY. Interestingly in the UK, the highest peak of the year was in November with searches surging **136%** YoY, helping to increase the level of bookings by **196%** compared to the previous year.

Pent-up demand drives heightened interest in extended trips

Extended stays of **3-4 weeks** and **1-3 months** grew YoY in 2021 across both Europe and UK, with a new generation of travellers taking advantage of the opportunity to 'work from anywhere' due to the flexibility offered by remote working.

Europe & UK total length of stay

*Data sourced from lastminute.com group flight search queries for the period January 1 to December 31, 2021 vs the same period in 2020



European travellers showed heightened interest in **mid to long-term trips** last year compared to 2020, with stays of **3-4 weeks** and **1-3 months** increasing by **25%**.

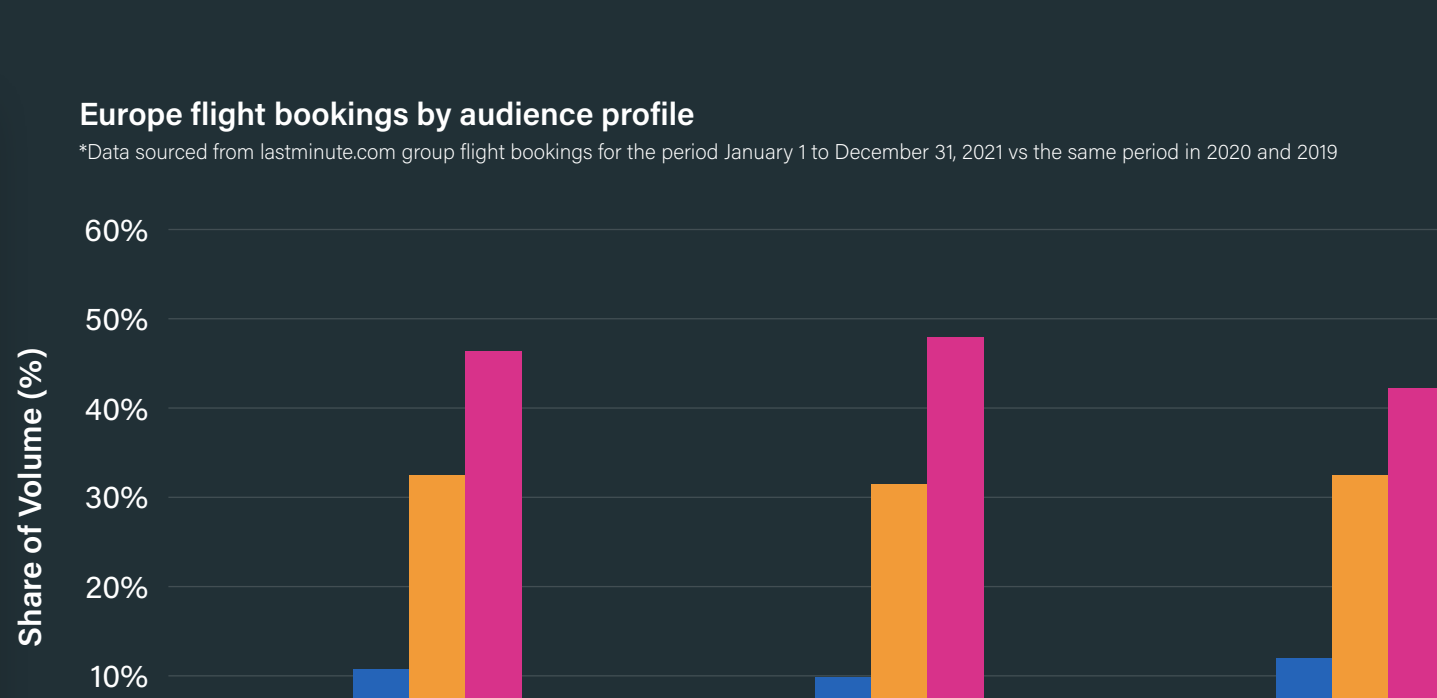
Consistent with European trends, trips of **3-4 weeks** and **1-3 months** increased by **40%** in 2021 compared to the previous year, with travellers making the most of their trips by working from abroad.

2021 saw a surge in travel confidence for group and family trips

Across 2021, **solo travellers** commanded a **42%** share of the total inbound distribution for flight bookings, followed by couples without kids. This was driven by the lower costs and increased flexibility of travelling in smaller groups. However, there are positive signs that group travel is making a comeback, with **families** and **groups** driving the biggest increase in flight bookings in 2021 vs the previous year (**+33%** and **+32%** respectively).

Europe flight bookings by audience profile

*Data sourced from lastminute.com group flight bookings for the period January 1 to December 31, 2021 vs the same period in 2020 and 2019



UK Spotlight

Similar to Europe, **75%** of UK flight bookings were made by **solo travellers** and **couples**, with families driving a **445%** surge in 2021 flight bookings compared to the year before.

Uncovering emerging travel audiences for brands to connect with

2022 is already showing positive signs of a boost in travel confidence, with Captify's search data revealing that travel searches have climbed **983%** YoY in the UK and **332%** YoY in Europe. So which audiences have seen substantial growth over this time and present an emerging opportunity for brands?

*Data sourced from Captify's European and UK network between January 1 to January 31, 2022 vs the same period in 2021





Sustainable Travellers are searching for trips off the beaten path

Sustainability is now a key consideration across many verticals, from fashion, auto to FMCG—and travel is no exception. Sustainability seekers are looking to reduce their carbon footprint by exploring destinations closer to home, supporting local communities while travelling, and booking more sustainable stays.

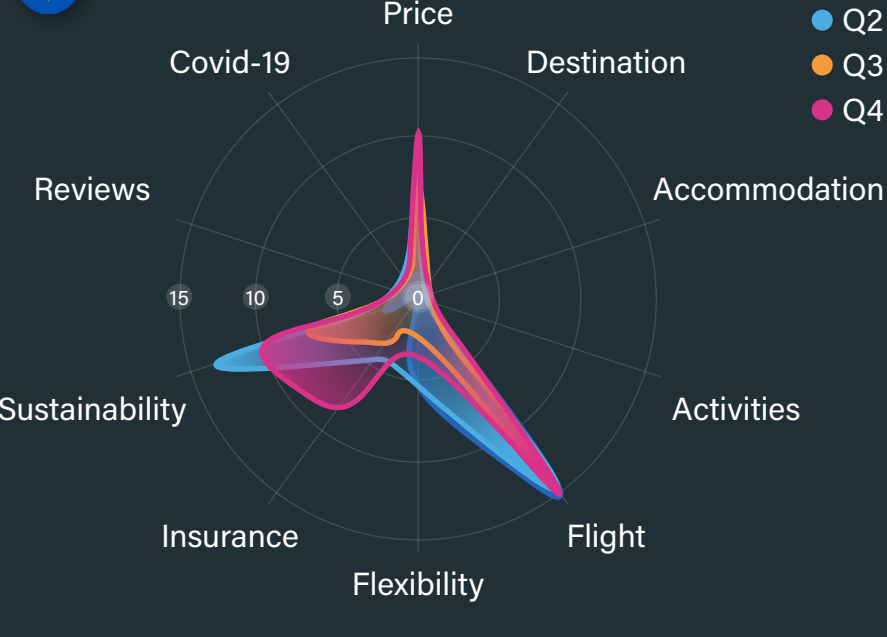
Average monthly searches



What's front of mind for this audience?

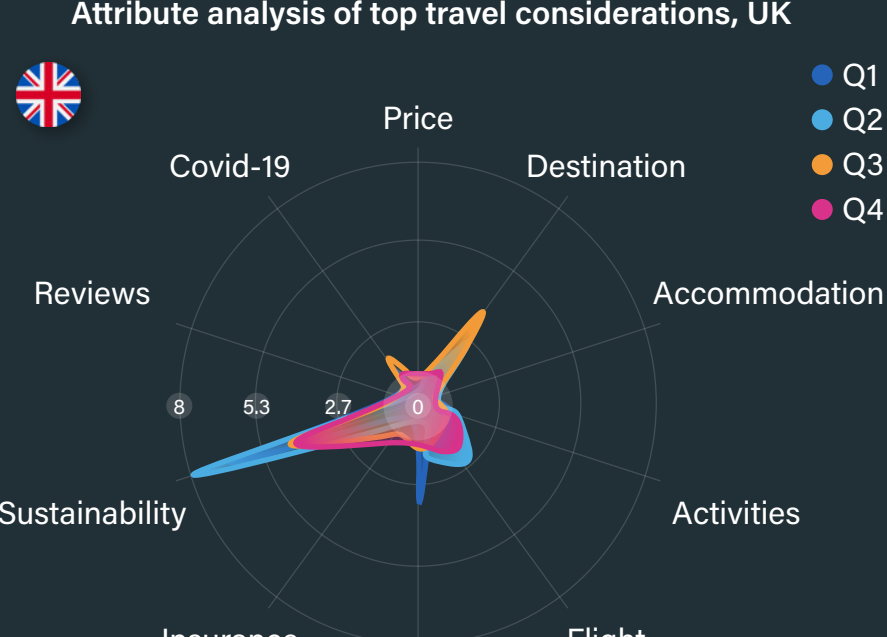
* Data sourced from Captify's European and UK network between January 1 to December 31, 2021

Attribute analysis of top travel considerations, Europe



Flights are a key consideration across Europe, as this audience looks for ways to reduce their carbon footprint such as through short-haul or direct flights.

Attribute analysis of top travel considerations, UK



Unsurprisingly, being more sustainable when travelling is key for UK travellers. When deep-diving into sustainable travel, **61.5%** of European searches and **41.7%** of UK searches are **destination-focused** as audiences explore places less impacted by overtourism, such as visiting second cities or travelling off-season.

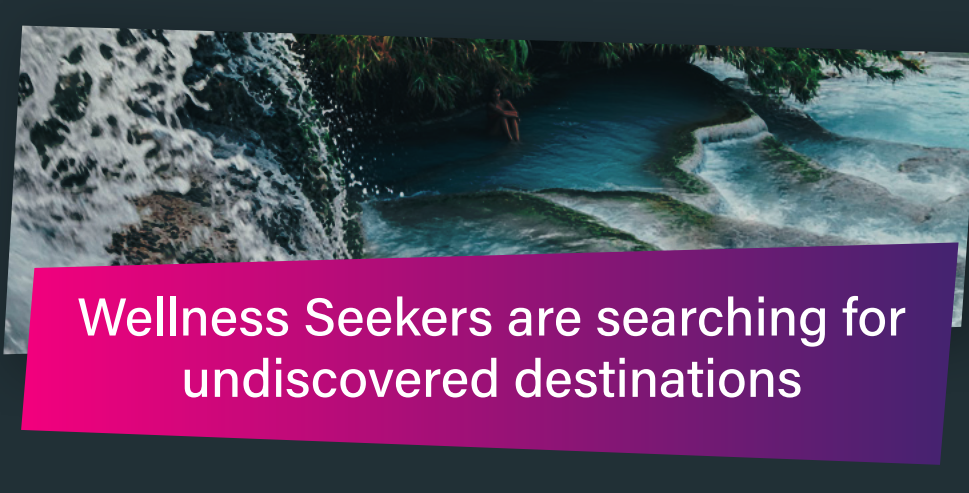


UK Spotlight

* Data sourced from Captify's UK network between March 1 to December 31, 2021

Top indexing interests:

- + Blogs—**5.1X**
- + Childcare—**5.0X**
- + Business—**3.8X**



Wellness Seekers are searching for undiscovered destinations

Whilst wellness travel was growing pre-pandemic, heightened restrictions and lockdown-induced stress reinforced the importance of physical and mental wellbeing. This has encouraged consumers to integrate wellness into their travels, whether that's spa retreats, wellness workcations, or exploring never-before-seen routes.

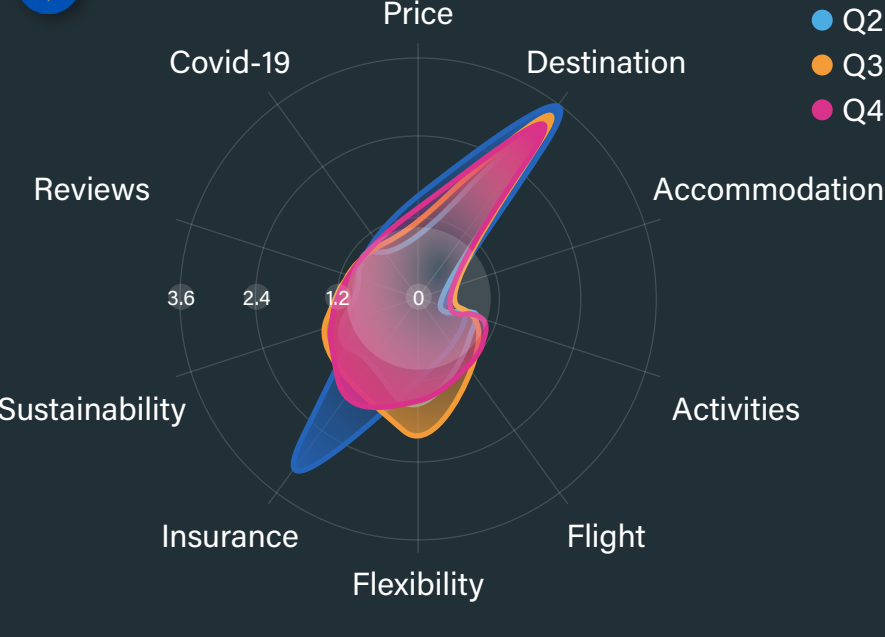
Average monthly searches



What's front of mind for this audience?

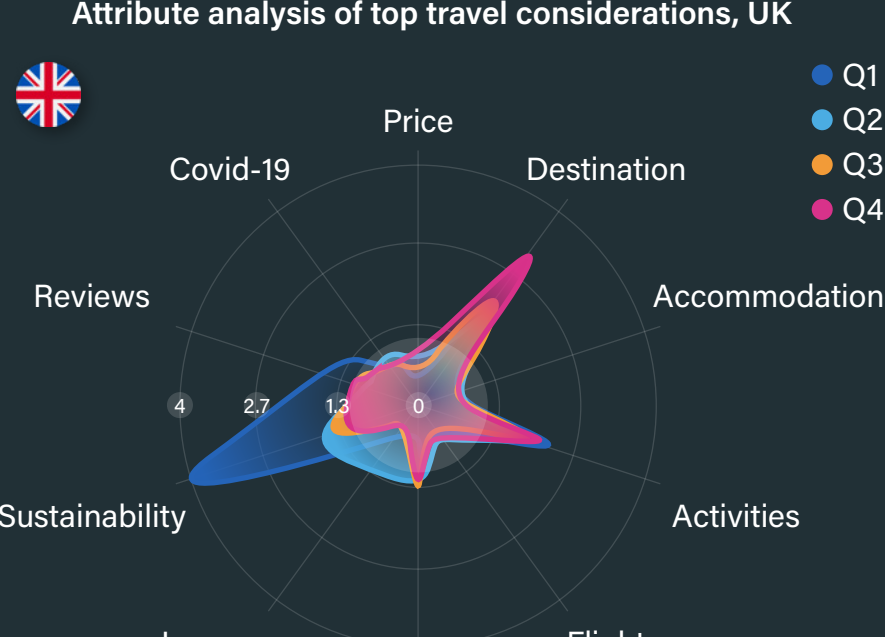
* Data sourced from Captify's European and UK network between January 1 to December 31, 2021

Attribute analysis of top travel considerations, Europe



Across Europe, the prospect of exploring new routes is key, with **destinations** indexing highest. **Insurance** is also a growing consideration for this audience.

Attribute analysis of top travel considerations, UK



While destination is also a key factor for UK audiences, Wellness Seekers are primarily focused on **sustainability**—reflecting how this is a growing consideration for audiences beyond just Sustainable Travellers.



UK Spotlight

* Data sourced from Captify's UK network between March 1 to December 31, 2021

Top indexing interests:

- + Quality seeking—**17.6X**
- + Blogs—**5.1X**
- + Luxury lifestyle—**4.9X**



Digital Nomads are searching for flexible travel solutions

The pandemic rewrote the rules of how people live and work, and flexible working has had a huge impact on how audiences choose to travel. Digital Nomads are looking for a better work-life balance and integrating travel into their life, they seek comprehensive solutions when 'working from anywhere'—such as month stay discounts and flexible booking policies.

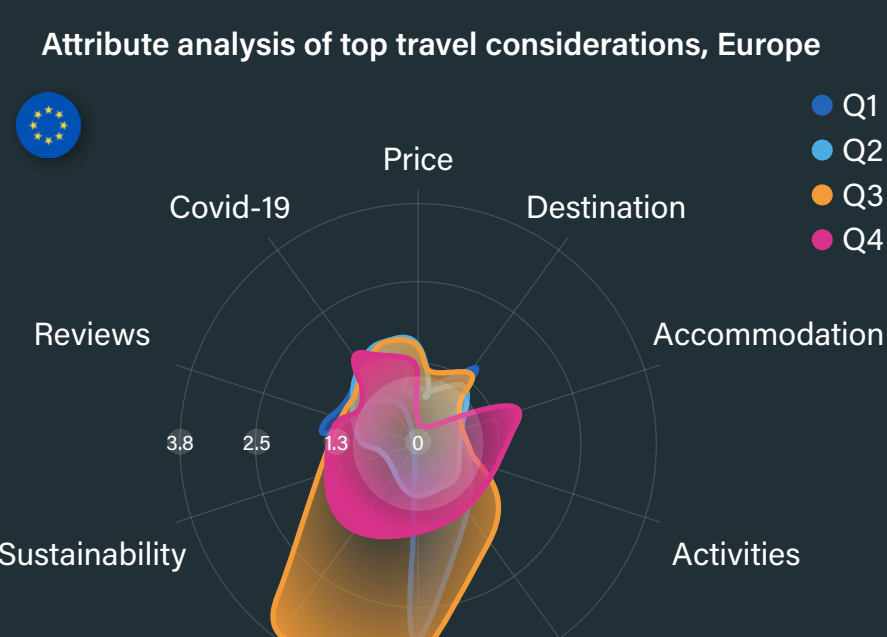
Average monthly searches



What's front of mind for this audience?

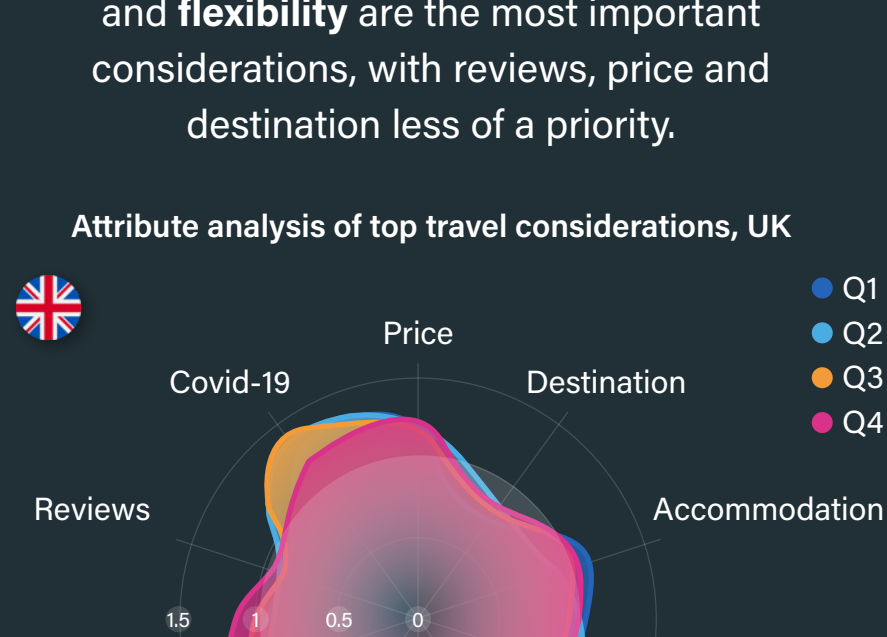
* Data sourced from Captify's European and UK network between January 1 to December 31, 2021

Attribute analysis of top travel considerations, Europe



For European travellers, **insurance** and **flexibility** are the most important considerations, with reviews, price and destination less of a priority.

Attribute analysis of top travel considerations, UK



As their trips are longer in nature, for UK travellers there is increased consideration across all travel aspects, with **flexibility** and **covid-19 concerns** being most important.



UK Spotlight

* Data sourced from Captify's UK network between March 1 to December 31, 2021

Top indexing interests:

- + Quality seeking—**11.7X**
- + Business—**6.5X**
- + Health—**3.8X**



Luxury Jetsetters are searching for reviews and new destinations

Flight hours of private jets have more than doubled worldwide in the third quarter of 2021 compared to the previous year, reaching the highest levels in the past seven years (Statista, 2021). A growing audience of Luxury Jetsetters are searching for an end-to-end luxury travel solution that increases convenience, minimises disruption, and avoids crowds.

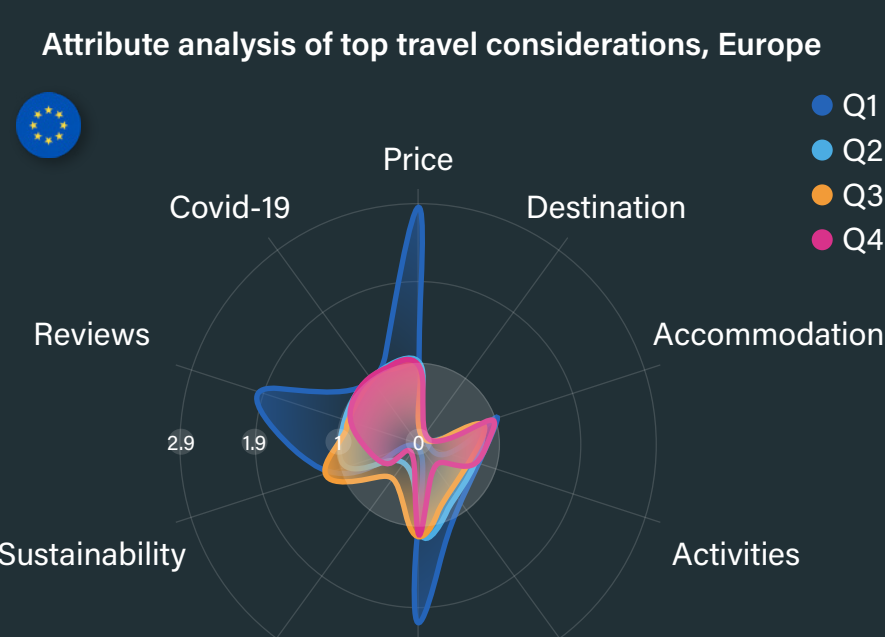
Average monthly searches



What's front of mind for this audience?

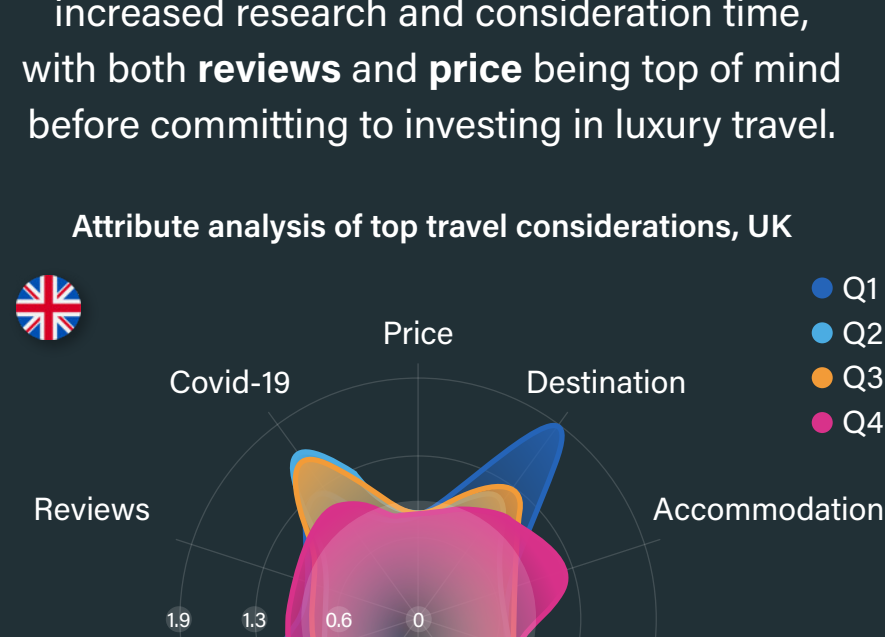
* Data sourced from Captify's European and UK network between January 1 to December 31, 2021

Attribute analysis of top travel considerations, Europe



High-involvement purchases often mean increased research and consideration time, with both **reviews** and **price** being top of mind before committing to investing in luxury travel.

Attribute analysis of top travel considerations, UK



In contrast, for the UK, this audience is more focused on **destination** choices with the increased convenience and **flexibility** of luxury travel being hugely important.



UK Spotlight

* Data sourced from Captify's UK network between March 1 to December 31, 2021

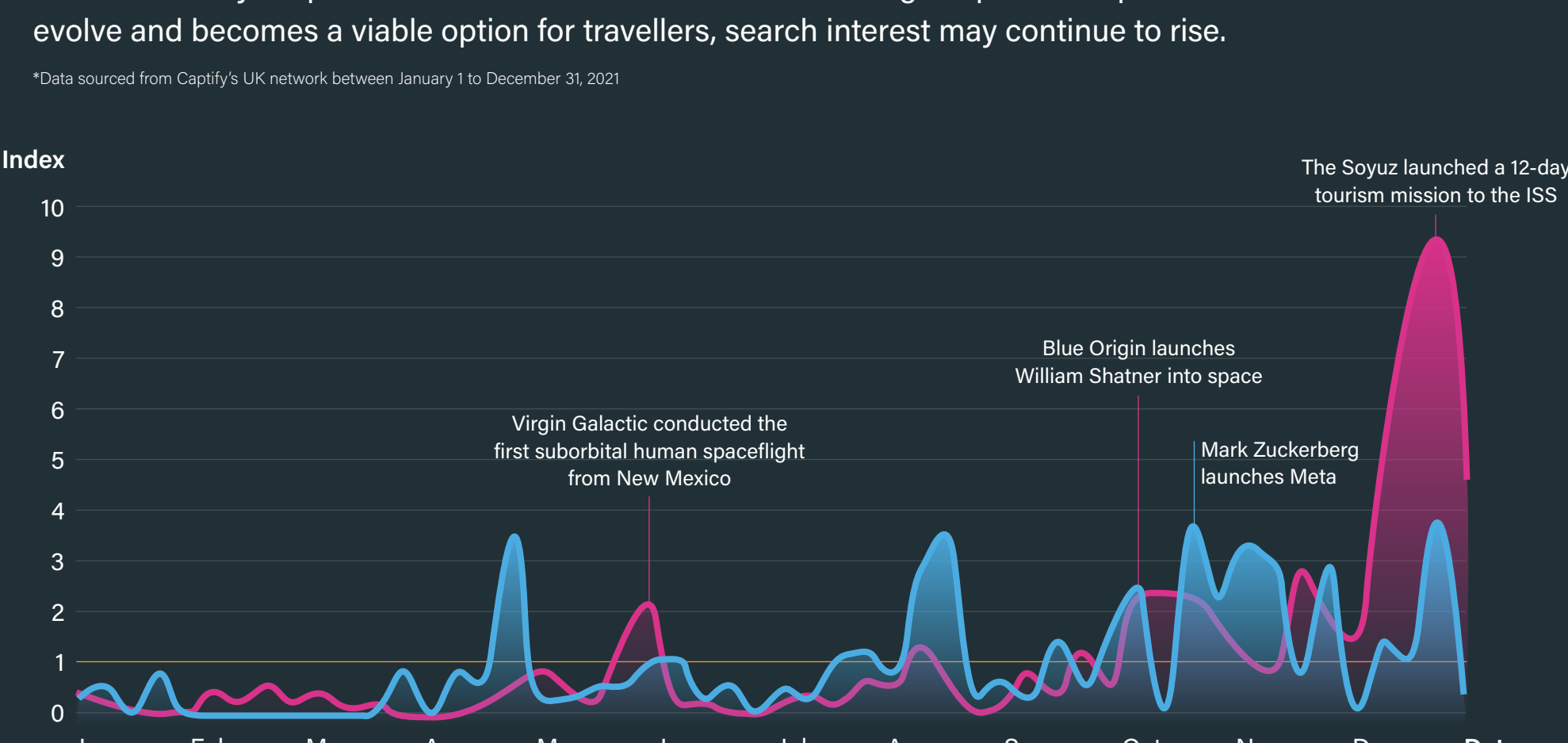
Top indexing interests:

- + Business—**6.5X**
- + Social media—**3.7X**
- + Brands/brand loyal—**3.6X**

Emerging travel trends

From space to meta travel, consumers are exploring new trends that could redefine the global travel industry. Consumer search interest around **space travel** has been primarily focused on key news events, such as the Soyuz space tourism mission and billionaires racing to space. As space travel continues to evolve and becomes a viable option for travellers, search interest may continue to rise.

* Data sourced from Captify's UK network between January 1 to December 31, 2021



Unleashing the power of search to stay ahead of changing audience behaviour and trends

The pandemic has proved that consumer behaviour can shift without warning, therefore brands and publishers need to be able to anticipate the macro level changes that are happening across their verticals.

Captify's search intent platform, Sense, puts Search Intelligence at your fingertips to discover critical consumer behaviours and unique insights on brands, competitors, audiences, moments and markets.

Publishers and brands can access a full-service 360-degree suite of tools in Sense to make real-time decisions based on the live pulse of search across the open web, powering advanced audience analytics, programmatic activation capabilities and highly-effective advertising strategies.

Get in touch to find out how Captify's Sense platform can help to supercharge your audience understanding:

info@captifytechnologies.com

Born from **lastminute.com**

Data methodology

Forward's Travel Intelligence Unit analyses the search and booking flow coming from lastminute.com's network of websites on a daily basis. Aggregating, processing and storing first-party data information within the protected environment of our Group's Data Warehouse. This report has been generated with a focus on outbound travel from main European countries throughout 2021, across multiple online travel products and data dimensions.

About

We are Forward, lastminute.com's media company.

We are a team of award winning marketers that partner with forward thinking businesses to super power their digital know how, technology and marketing activations.

Forward's mission is to help businesses move forward by unlocking new opportunities to make their marketing activity more efficient, intelligent and relevant.

www.thisisforward.com

Data methodology

The data has been sourced by Captify's Insights Studio, Sight using Sense, the search intent platform. The data has been collected across six markets (UK, France, Germany, Spain, Italy and the Netherlands) between January 1 2021 to France 31 2022, based on 24bn+ monthly searches that Captify captures across premium publishers.

About

Captify is the largest independent holder of search data outside of the walled gardens, connecting the real-time searches of over 2 billion people globally. Its Search Intelligence technology powers omni-channel programmatic advertising and real-time insights for the world's biggest brands, such as Lexus, Disney, Bose, American Express and Microsoft—without reliance on third-party cookies. Captify brings brands more consumers, publishers greater yield and consumers the most relevant digital experiences.

www.captifytechnologies.com