

# Long Haul vs. Short Haul Travel

## **Inspire**

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Key trends and differences between  
short haul vs. long  
haul holiday searchers

**United Kingdom**

## Key Takeaways

1) **Short Haul Destinations:** Spain is still the most popular short haul destination, whereas Morocco and Greece are the fastest growing.

2) **Long Haul Destinations:** USA is still number one destination for long haul, followed by the Caribbean, but New Zealand has grown +200% YoY.

3) **Demographics:** The Short Haul Audience is more likely to be between 18 – 34 and Female. The Long Haul Audience is more represented by affluent Mosaic Groups, whereas the Short Haul Audience is represented by families on a budget.

5) **Age differences:** The 18 – 34 age group is more likely to search for short haul destinations, particularly 'cheap flights'. The 35 – 54 audience searches for long haul destinations, and are more interested in holidays.

5) **Travel planning sites:** The Short Haul Audience is more likely to visit TripAdvisor and Trivago, but less likely to visit Skyscanner and Expedia compared to the Long Haul Audience.

### Inspire to Action



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# Search Demand – Short Haul Destinations

Spain still #1, but Morocco and Greece top the fast-movers

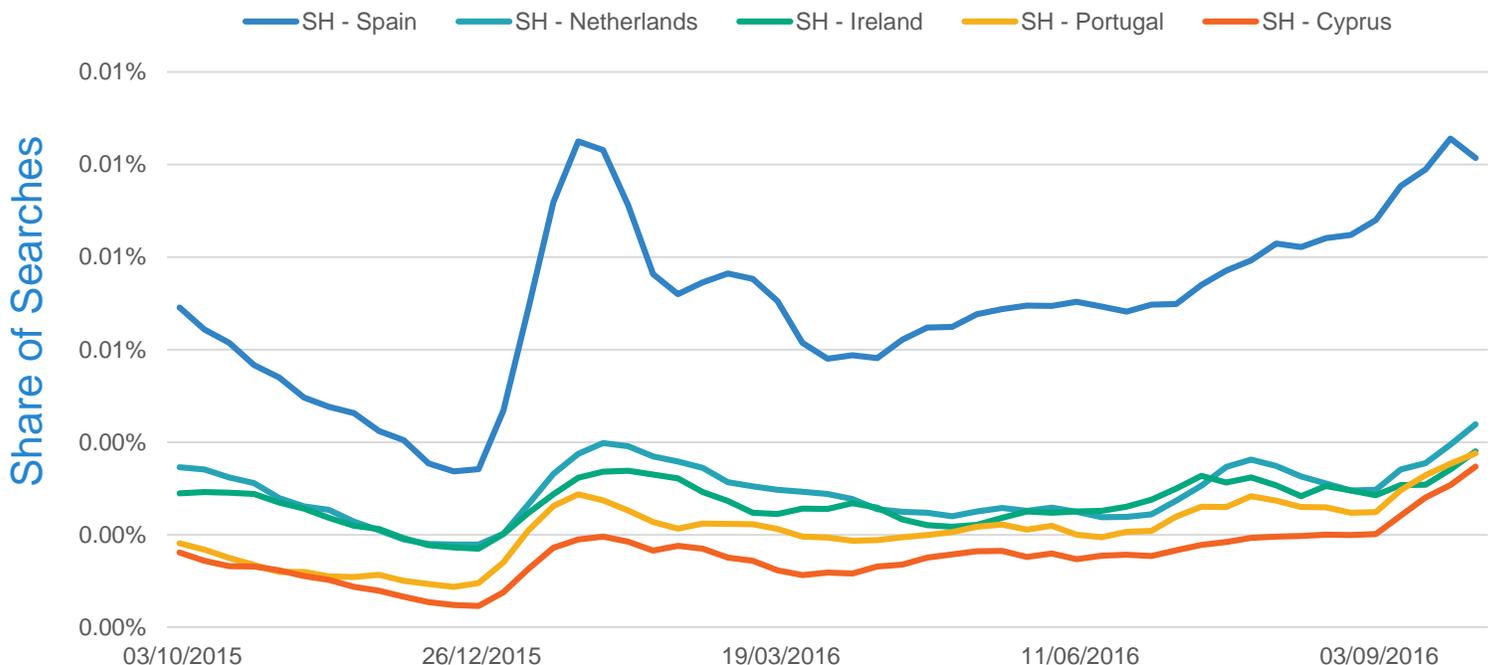
As shown in the table to the right, Morocco, Greece, and Croatia are the fastest growing short haul destinations, comparing the four weeks ending 1<sup>st</sup> October 2016 to the same period the year before.

Notably, France and Egypt were the slowest growing destinations. This highlights the impact of recent terror incidents, as well as ongoing political unrest.

Spain was only the 8<sup>th</sup> fastest growing, but continues to have more than twice the search demand of the next highest destination, the Netherlands—especially during the holidays.

Rank	Portfolios	YoY Growth
11	SH - Morocco	196.05%
7	SH - Greece	181.26%
10	SH - Croatia	138.56%
5	SH - Cyprus	115.07%
4	SH - Portugal	107.10%
12	SH - Belgium	99.16%
9	SH - Turkey	58.47%
1	SH - Spain	46.82%
3	SH - Ireland	31.24%
6	SH - Italy	28.95%
2	SH - Netherlands	26.76%
8	SH - France	22.48%
13	SH - Egypt	16.42%

## Top 5 Most Popular Short Haul Destinations:



# Search Demand – Long Haul Destinations

## New Zealand grows in popularity, USA still top destination

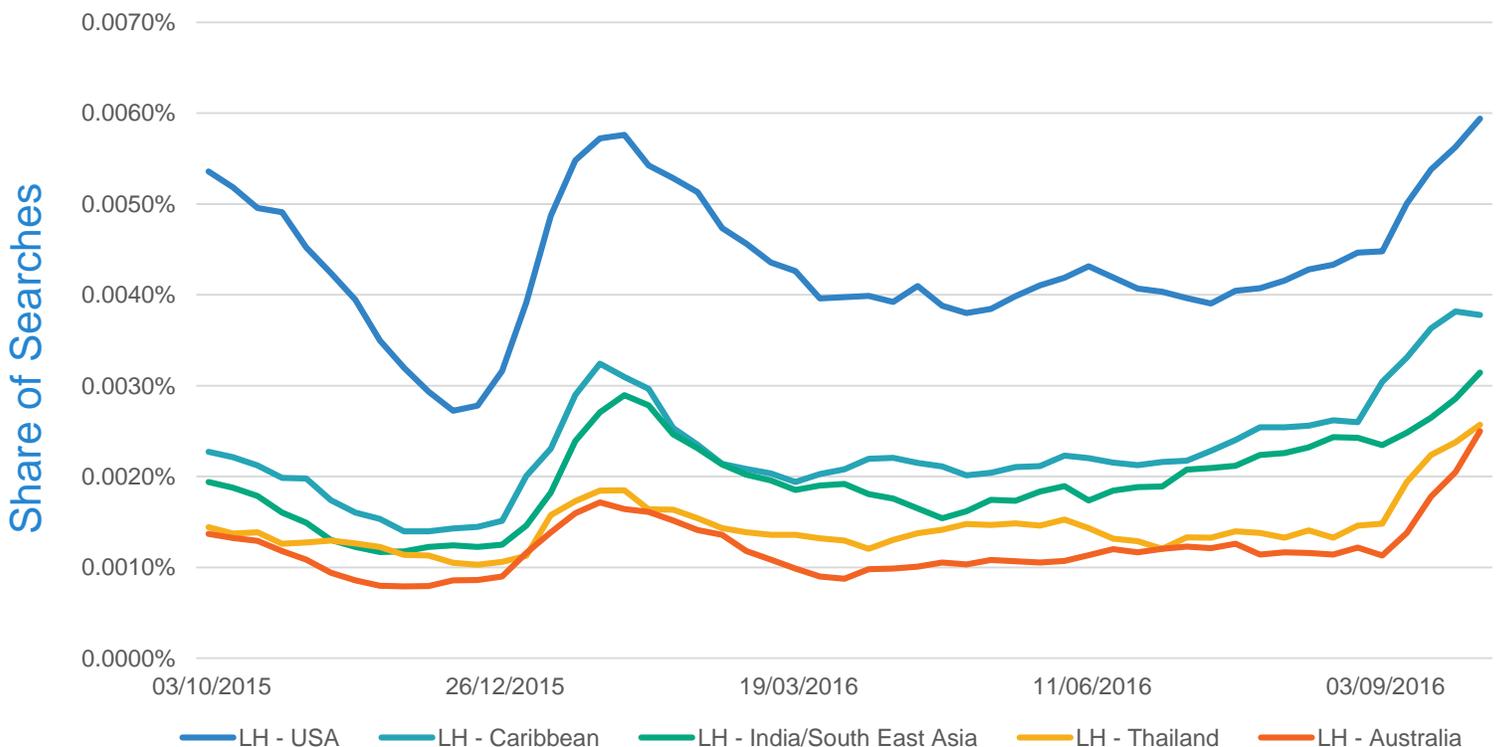
If we then analyse from a Long Haul perspective, we can see that New Zealand is the fastest growing destination over the same time period.

Africa and Mexico have also more than doubled in search demand year on year, showing the growth of consumer interest in these developing nations, compared to the slower growth in more traditional destinations such as USA and the Caribbean.

Rank	Portfolios	YoY Growth
8	LH - New Zealand	279.30%
7	LH - Africa	130.90%
6	LH - Mexico	101.81%
5	LH - Australia	82.62%
4	LH - Thailand	78.28%
2	LH - Caribbean	66.40%
3	LH - India/South East Asia	62.33%
1	LH - USA	10.84%

Although USA was the slowest growing destination, it remains the most popular year on year. The level of demand for US destinations remains over 1.5 times greater than the next highest, which is the Caribbean.

### Top 5 Most Popular Long Haul Destinations:



# Search Demand – Top Cities and Islands

## Amsterdam and New York most popular Cities

The most popular individual short haul destinations include a mixture of traditional ‘city break’ locations such as Amsterdam and Paris, as well as those visited more frequently by holiday-makers, like Benidorm and Lanzarote.

The most popular long haul location by far is New York, followed by Cuba, Las Vegas, and the Maldives, which all have similar levels of search demand.

The increasing popularity around Greece can be seen through increased searches for Corfu, Crete, and ‘Greek Islands’. Similarly, we can see that Cancun is the fastest growing city within Mexico, and that Gambia is becoming increasingly popular.

It is notable that consumers tend not to search for individual cities in New Zealand, mostly just for the actual country name.

## Most Popular Keywords (four weeks ending 1<sup>st</sup> October 2016):

Top Destinations	
SH	LH
amsterdam (10.39%)	new york (17.52%)
dublin (6.49%)	cuba (5.52%)
benidorm (5.95%)	las vegas (5.45%)
cyprus (5.55%)	maldives (5.16%)
paris (4.52%)	orlando (4.27%)
lanzarote (4.17%)	barbados (3.73%)
barcelona (3.13%)	bangkok (3.58%)
gran canaria (3.09%)	jamaica (3.23%)
rome (3.07%)	mauritius (2.96%)
ibiza (2.25%)	cancun (2.75%)

Fastest Moving Destinations	
SH	LH
cyprus (+1.27%)	maldives (+1.36%)
corfu (+1.02%)	cancun (+1.12%)
crete (+0.88%)	jamaica (+1.11%)
albufeira (+0.65%)	barbados (+1.08%)
belfast (+0.61%)	sydney (+0.94%)
paphos (+0.46%)	bangkok (+0.86%)
majorca (+0.45%)	melbourne (+0.61%)
porto (+0.41%)	phuket (+0.60%)
greek islands (+0.37)	gambia (+0.54%)
agadir (+0.36%)	puerto rico (+0.50%)

# Short Haul vs. Long Haul Audiences

Short Haul audience is younger and more likely Female

Using AudienceView, we are able to segment the online population to better understand individuals searching for short haul and long haul travel. The below shows the key differences between these audiences, for the four weeks ending 1<sup>st</sup> October 2016.

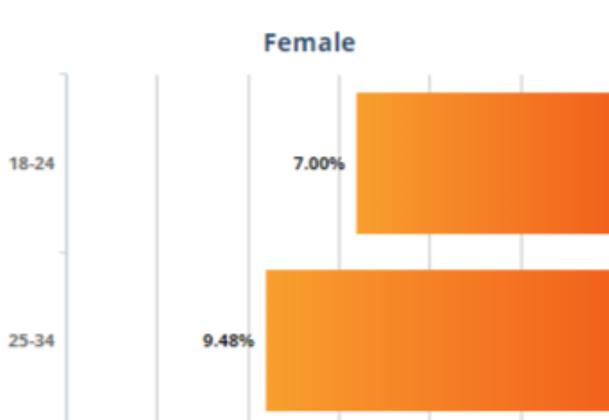
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## Short Haul Audience

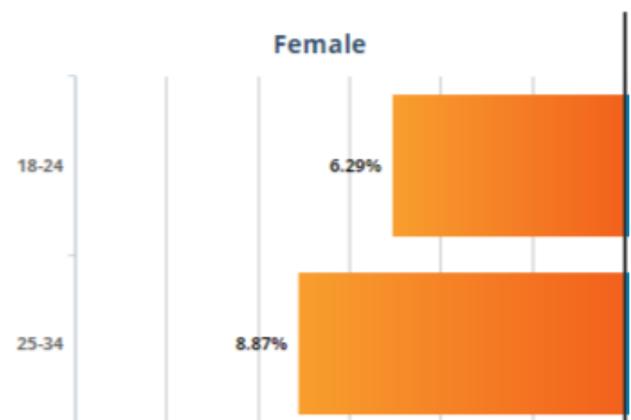
- Largest group are aged 55+
- Slightly higher share of 18 – 34 age groups: 12.4% are 18-24, and 18.1% are 25-34.



- Females represent 54% of the audience
- Largest region in North West, most over-indexed in Northern Ireland

## Long Haul Audience

- Largest group are aged 55+
- Higher share than Short Haul in 35-54 groups: 20.2% are 35-44, and 22% are 45-54.



- Females represent 52% of the audience
- Largest region in South East, most over-indexed in East

# Short Haul vs. Long Haul Audience

## Differences in household income of searchers

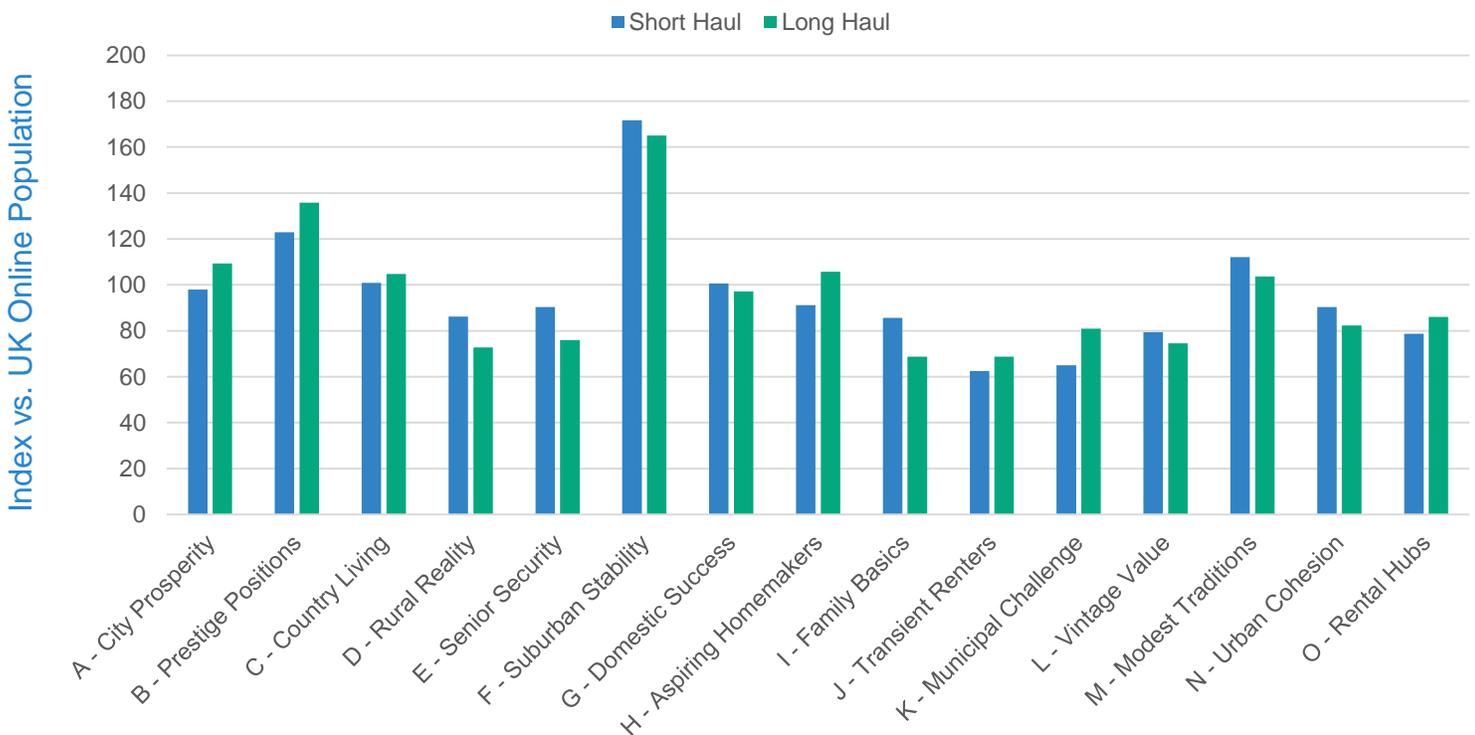
AudienceView also allows us to analyse the difference in the two audiences Mosaic Groups profiles, to identify key differences in their characteristics.

As shown on the chart below, the Long Haul audience is more likely to be within Mosaic Groups A and B, which represent more affluent consumers within the UK.

Conversely, the Shot Haul audience over-indexes more than Long Haul in Group I, which represents families with limited resources, lower budgets, or larger families.

This provides insight into the types of audiences looking to book during this period of time. AudienceView could also be used to analyse how this audience changes during peak season.

Short Haul vs. Long Haul Mosaic Audience:  
(four weeks ending 1<sup>st</sup> October 2016)



# Age Differences in Search Behaviour

Younger audience more likely to search for short haul destinations

Analysing the search terms used by different audiences allows us to see behavioural differences in online search activity.

As seen in the table on the left, 15 out of the top 20 searches that the 18 – 34 group over-indexes for are short haul destinations. On the right, 11 out of the top 20 searches that the 35 – 54 group over-index for are long haul destinations.

Searching for ‘cheap flights to x’ is a common theme across both age groups. 10 out of 20 searches for the 18 – 34 group focus on ‘flights’, whereas 12 out of 20 searches made by the 35 – 54 group are focused on ‘holidays’.

## Destination Search Behaviour - Age Group Index

### Age 18-34

Search Term	Relative Differen
hotels barcelona	1526.27%
flights to italy	1510.02%
flights to sydney australia	1271.02%
bruges hotels	998.70%
lanzarote flights	989.42%
hawaii holiday	972.40%
seville hotels	894.69%
cheap flights to algarve	782.98%
hotels in protaras	762.85%
cheap flights amsterdam	753.69%
cheap flights to porto	678.95%
holiday village kos	647.04%
hotels in bruges	629.46%
cheap flights to gran canaria	617.59%
holidays to gran canaria	593.56%
orlando holidays	564.40%
vegas hotels	554.81%
flights to mauritius	546.97%
flights to barcelona from manchester	504.26%
cheap flights to holland	482.57%

### Age 35-54

Search Term	Relative Differen
vegas holidays	-84.36%
cheap flights to mexico	-83.47%
seaview holiday village ibiza	-83.20%
hard rock hotel orlando	-82.28%
new york holidays 2017	-81.05%
cheap flights to barcelona	-79.95%
rome holidays	-79.13%
holidays to cuba 2017	-78.24%
barbados holidays	-78.07%
algarve holidays	-77.87%
cheap flights to ireland	-77.59%
new zealand holidays from uk	-76.65%
holidays to mexico	-75.37%
gambia holidays	-74.72%
cheap flights to africa	-74.68%
flights to madeira	-74.67%
lanzarote hotels	-73.52%
holidays to lanzarote	-71.99%
hotels amsterdam	-71.96%
st lucia holidays	-71.02%

# Audience Online Behavioural Trends

## Short Haul audience more likely to visit TripAdvisor and Trivago

AudienceView can also be used to identify the online activity of different audiences. The below shows us the visit share of both the Short Haul and Long Haul audiences to websites within the Travel industry.

The column labeled “Relative Difference” shows which audiences are more likely to visit the listed sites—green is Short Haul, red is Long Haul. For example, the Short Haul audience is 23.70% more likely to visit TripAdvisor, and 26.20% more likely to visit Trivago. This could suggest that this audience is more likely to research destinations, hotels, and things to do etc.

On the other hand, the Short Haul audience is 16.18% less likely to visit Skyscanner, and -10.23% less likely to visit Expedia compared to the Long Haul audience.

### Visits Share to Travel Sites (four weeks ending 01<sup>st</sup> October 2016):

Website	SH Audience	LH Audience	Relative Difference
www.tripadvisor.co.uk	7.29%	6.41%	13.63%
www.booking.com	4.76%	3.85%	23.70%
www.thomson.co.uk	3.54%	3.13%	13.01%
www.skyscanner.net	2.32%	2.77%	-16.18%
www.thomascook.com	2.48%	2.40%	3.38%
www.expedia.co.uk	1.76%	1.96%	-10.23%
www.britishairways.com	0.85%	1.52%	-44.16%
www.trivago.co.uk	1.77%	1.40%	26.20%
www.firstchoice.co.uk	1.22%	1.11%	9.77%
www.lastminute.com	1.41%	1.03%	36.55%

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