



Travel Advertising Report 2024

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Welcome to...

...your advertising analysis

Be on the lookout for data and insight on the following travel brands and more



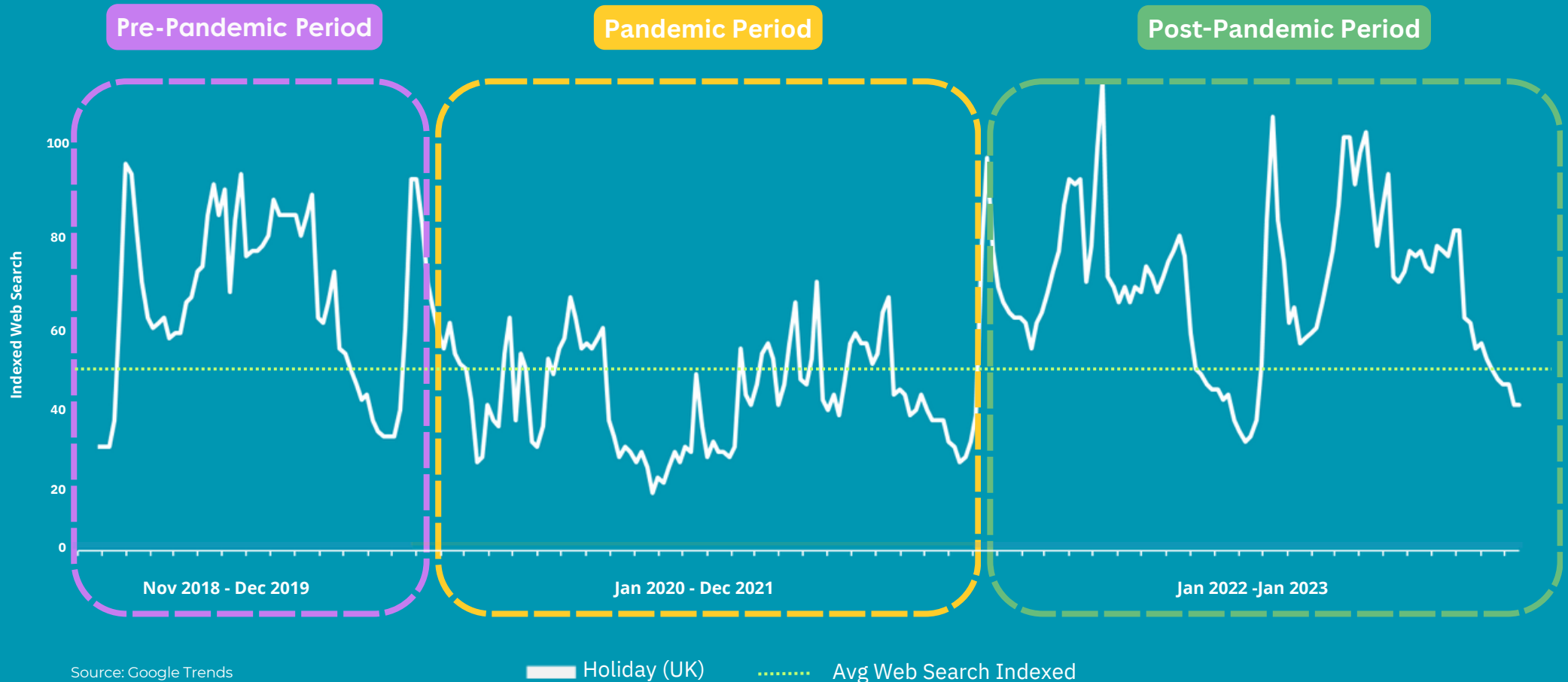
TRAVEL REPORT

1 Travel Industry Trends

- 2 TV Strategy
- 3 Travel Brands & TV
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- 5 Resorts & Hotel Brands

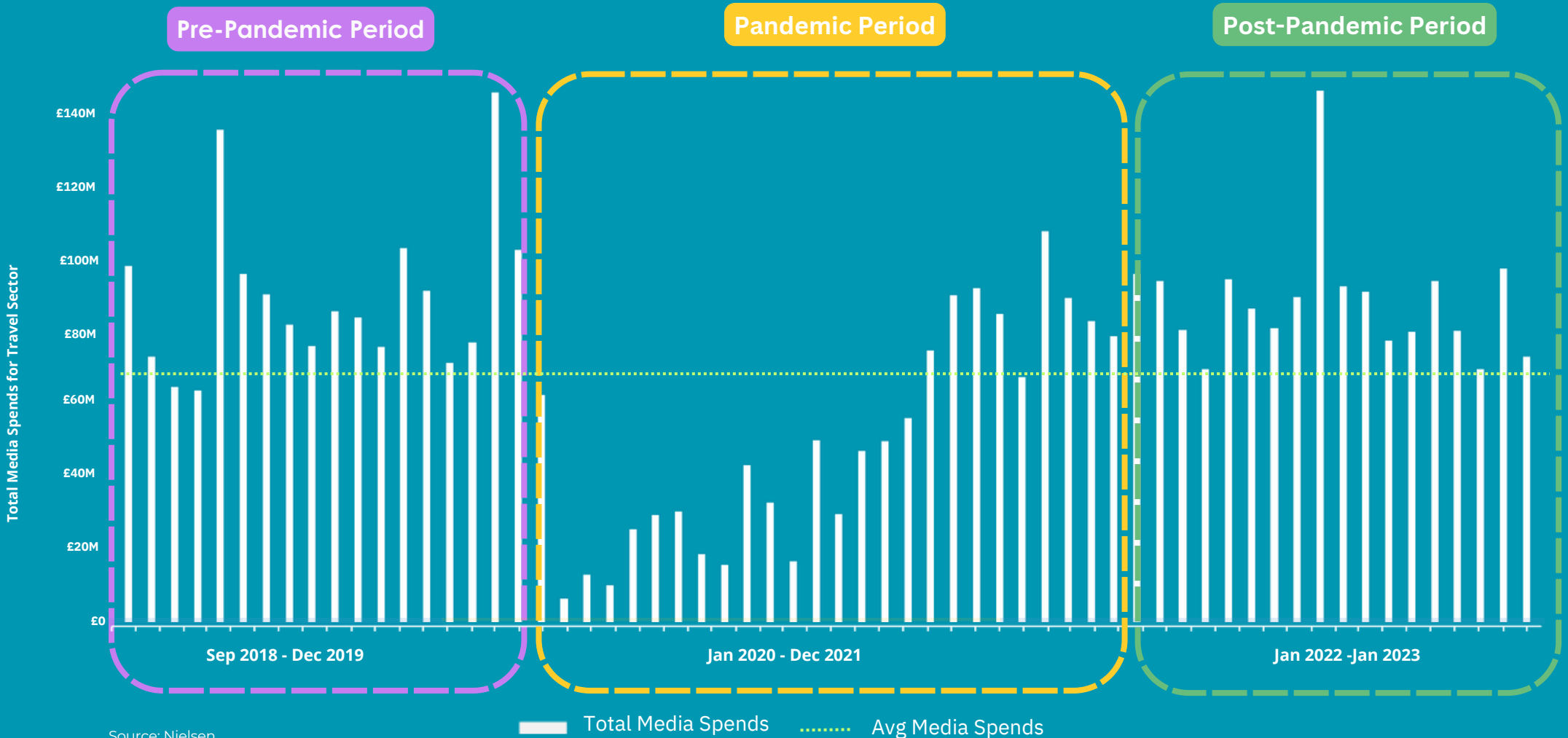
'Holiday' search term returns to pre pandemic levels

Using Google Trends historical data, we can see how the topic 'Holiday' in the UK (which is linked to the interest/intent to book a holiday) has returned to pre-pandemic levels.

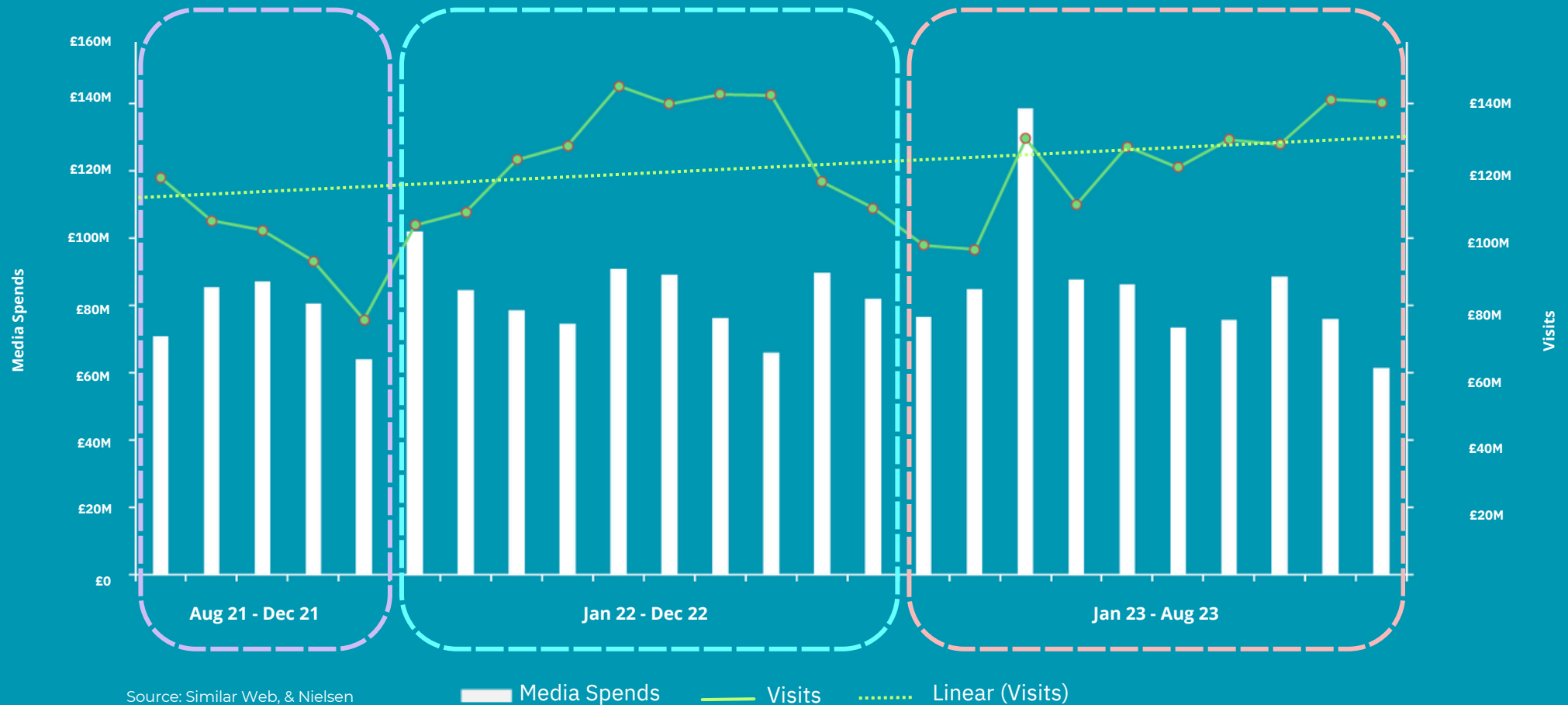


Media spends for the travel sector bounces back after pandemic

Starting in January 2022, they began to return to normal levels. With the two charts showing that demand and investments made by brands operating in the travel sector are now back to normal, there is no risk for travel brands wanting to invest in advertising to waste money. This is because the **market is now back at full potential.**



Full travel sector media spends vs visits



The Travel industry has been following a clear trend for the last 3 years. According to the key terms associated with travel, search intent is now returning to pre-pandemic levels.

From this we can take away 3 things:

1

Visits tend to **increase in January** at the start of the New Year, and they peak in August before **declining right around Christmas**

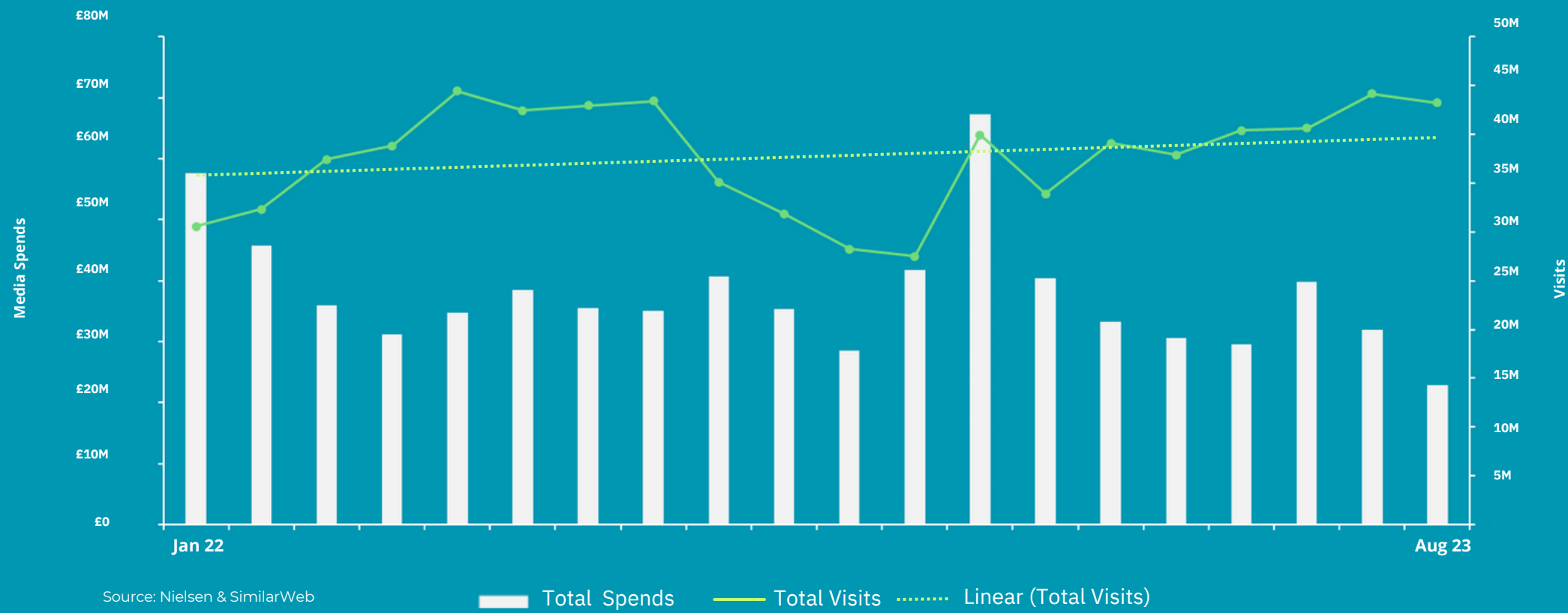
2

British people like to plan their holidays **in advance**

3

Summer is the **preferred time of travel** for British people

Even the brands spending more than 10M follow the same trend



Even for the bigger spenders, the number of new visitors **isn't impacted by media investment**. One of the reasons for this is because most of the companies in the industry **focus their strategy on the brand**. Consequently, they have a very strong brand awareness score. Customers tend to choose the brand when they **need their services** rather than being motivated by TV suggestions. That's why we notice a large amount of web visits **during the peak season**, when the demand is high.

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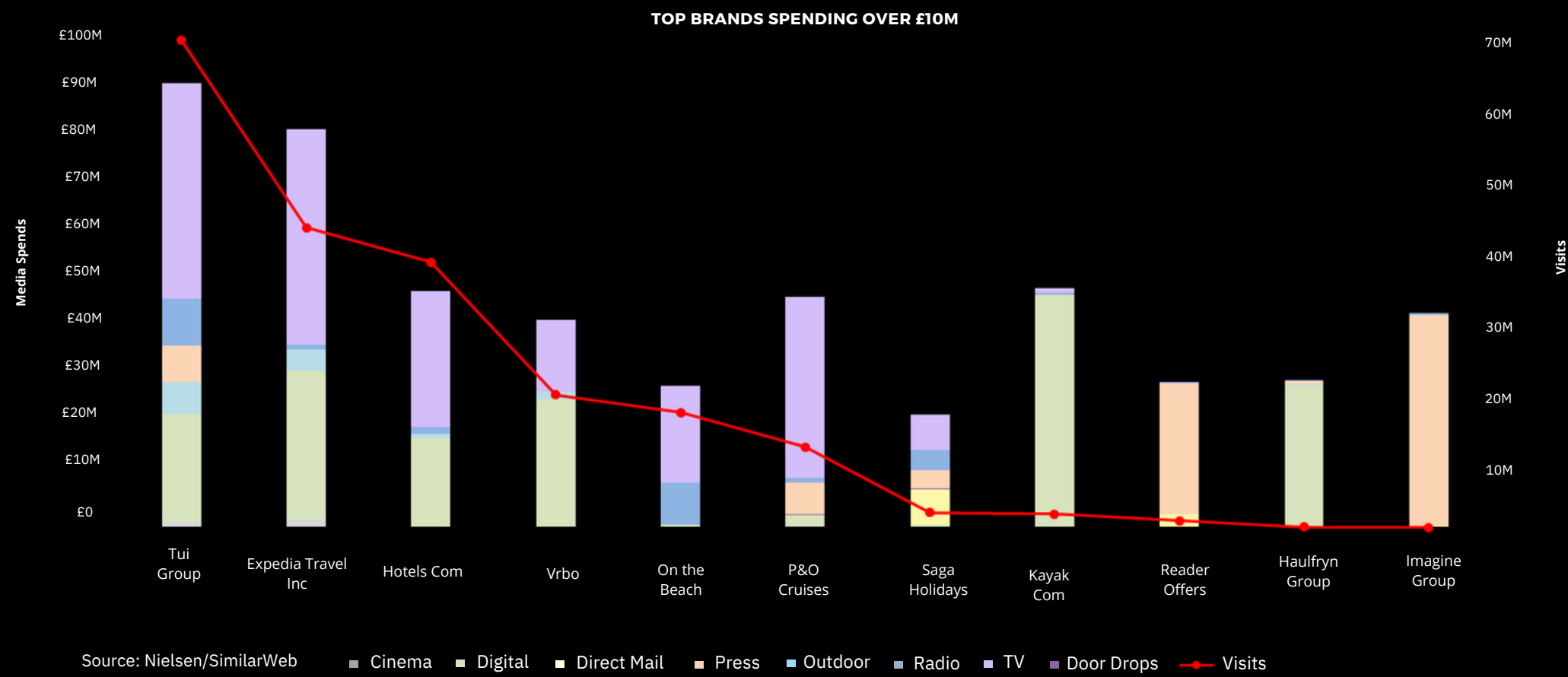
3 Travel Brands & TV

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Not having a TV strategy might negatively impact visitors

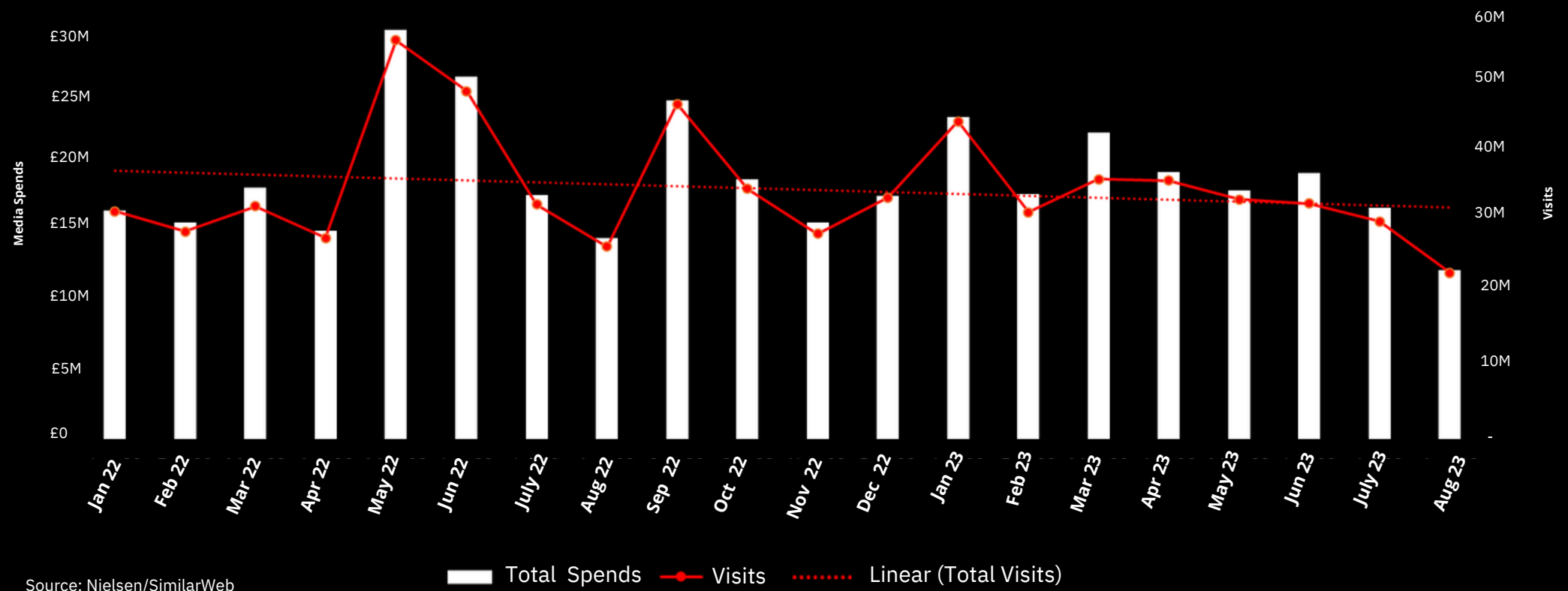
The secret to generating new visits is having a combination of **BOTH TV and Digital**. Brands that balance it see the best returns. The ones that lean too heavy to either TV or Digital tend to show less visits.



An appropriate TV strategy is necessary

Brands between the 5M and 10M are able to impact the number of visits with an appropriate TV strategy. What's even more apparent, is how highly responsive to investment the visit line is. It's almost identical to the level of spend.

This is thanks to a shift in strategy which focuses more on **activation and customer acquisition in the short-term**, rather than passively being chosen by customers in the travel industry.

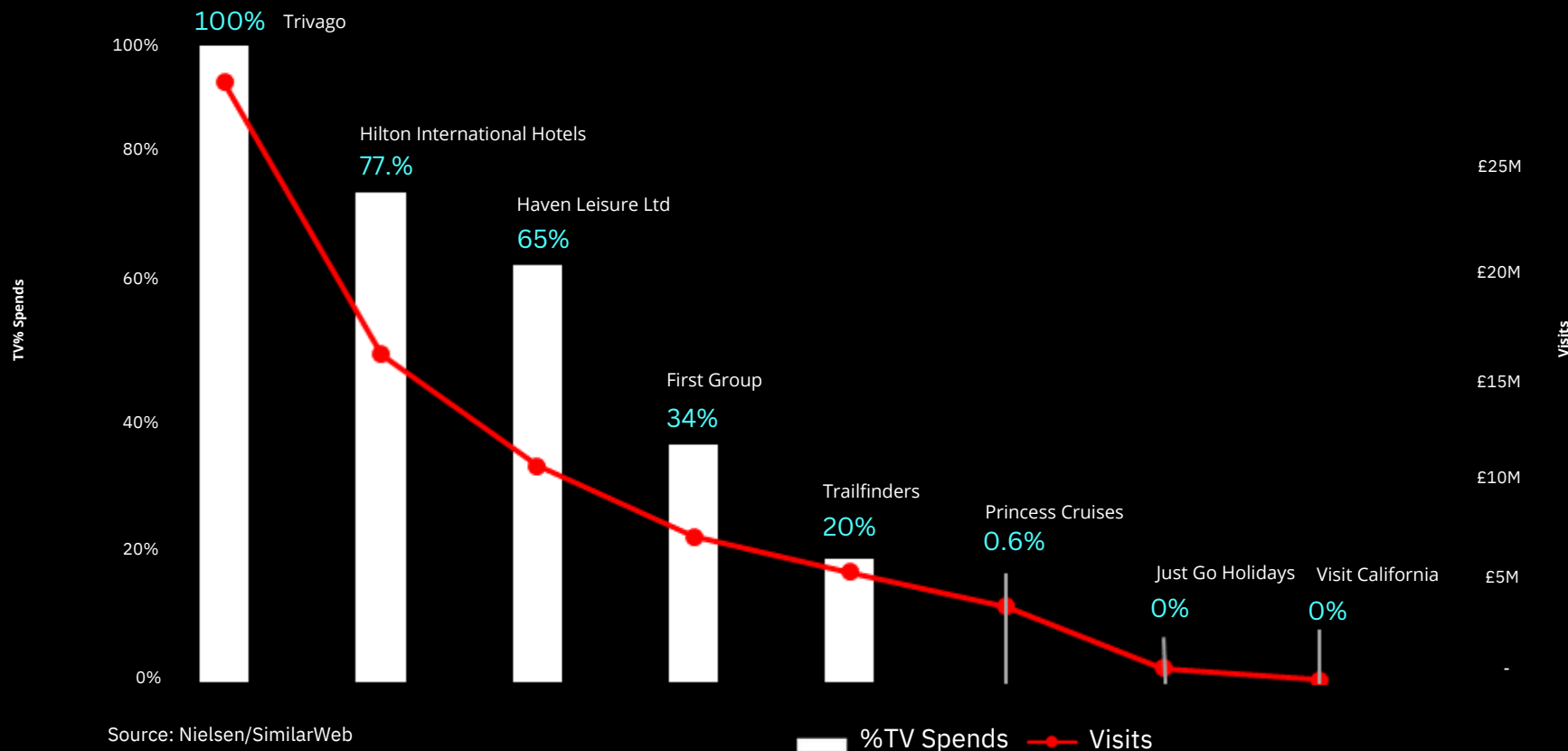


TV investments and web visits are linked

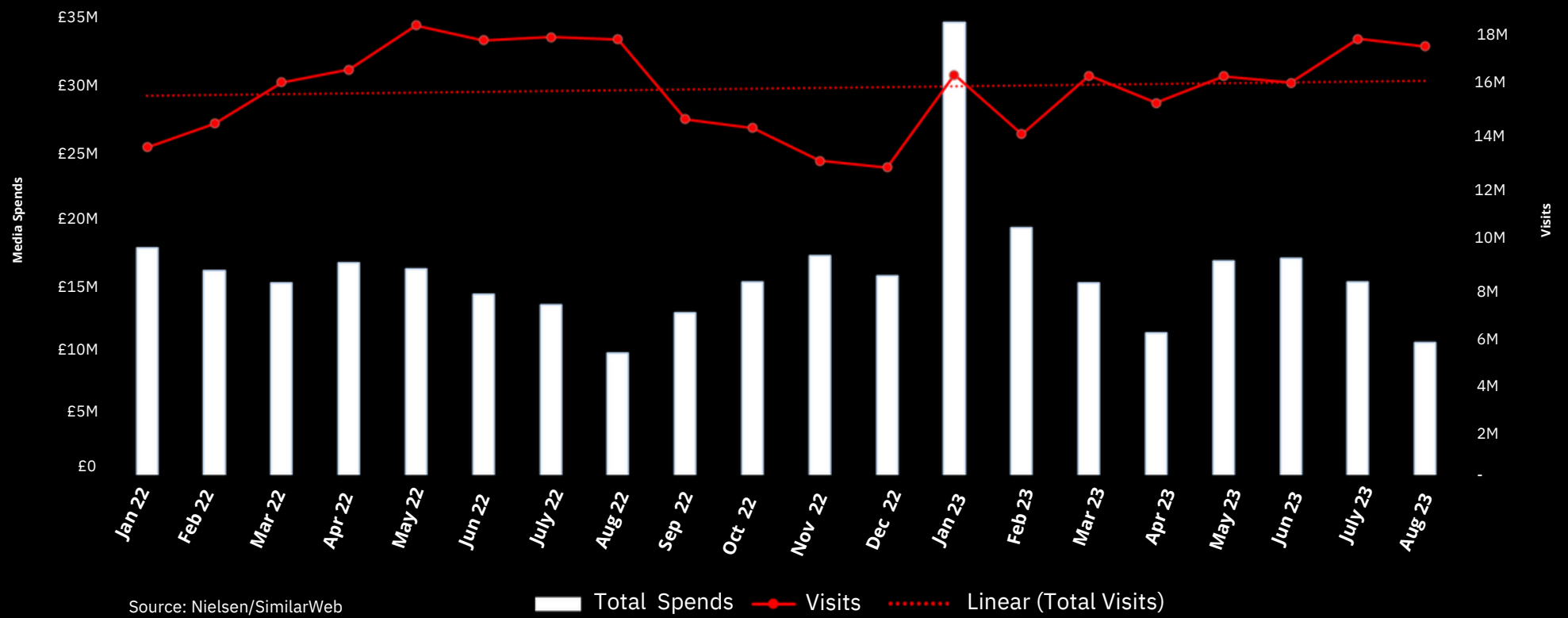
To compete with the larger players in the industry, a good customer acquisition plan and a short-term activation strategy can yield very good results.

The below graph shows the high correlation between **TV spending and visitor numbers**. That explains why the sector's trend line is so sensitive to media spending, and it also makes clear how crucial it is for these brands to implement a strategy with TV at the forefront.

Brands more focused on acquiring customers in the short-term can increase their purchase intent. Consistent investment over a long period can also increase their recognition and build awareness.



Brands spending between £1m and £5m struggle to draw in visits



The trend line in the chart shows a **lack of receptivity to media investments**. Essentially, these brands are struggling to draw in customers and the industry trend line shows that it's the consumers choice that is driving this pattern.

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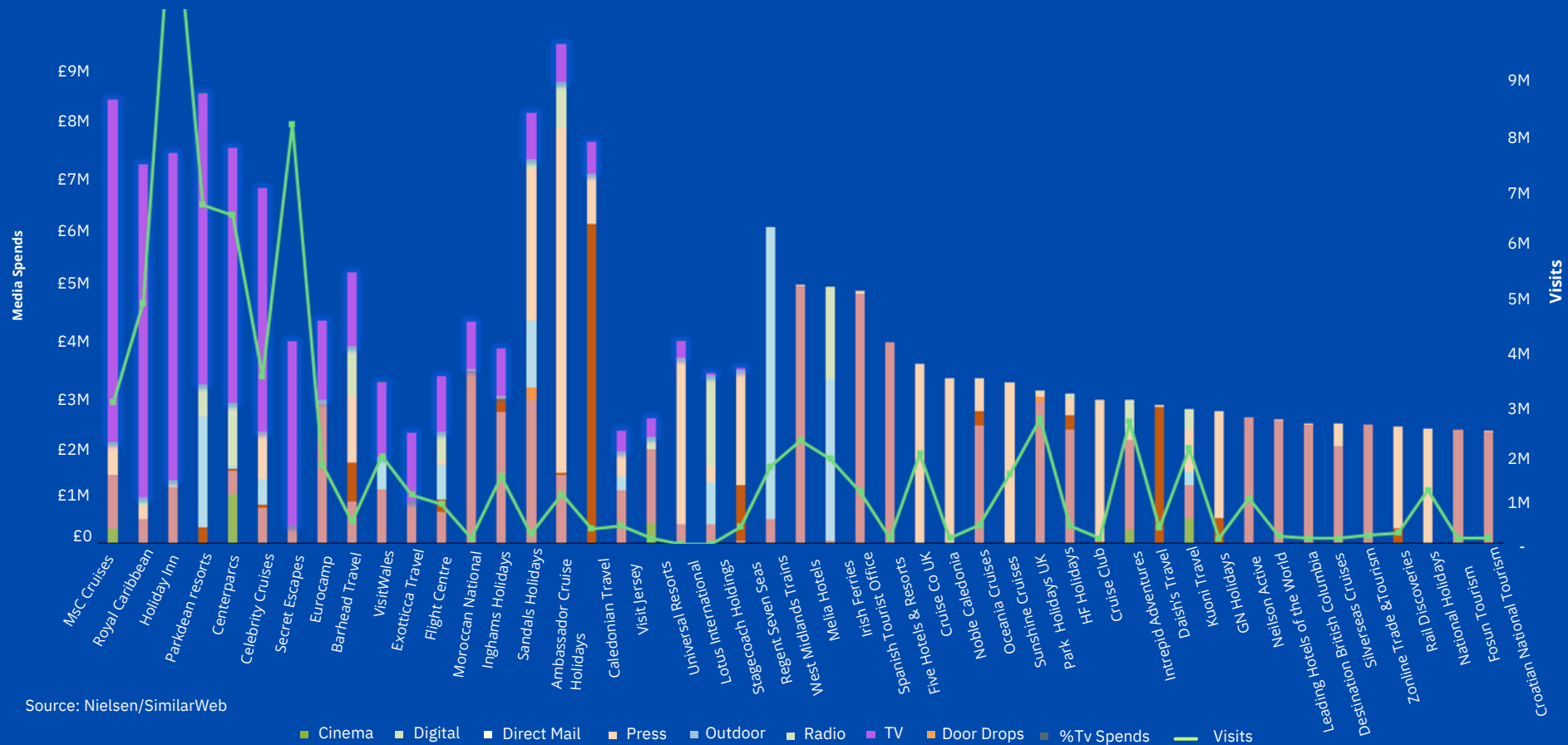
5 Resorts & Hotel Brands

Only 15% of the brands in the chart below are investing heavily in TV

A higher level of TV investment is also correlated with a **higher level of web traffic**. 75% of the brands are not investing in TV (or only investing a little) and as a consequence are performing poorly.

This may negatively impact group performance overall and prevent the market from being appropriately stimulated.

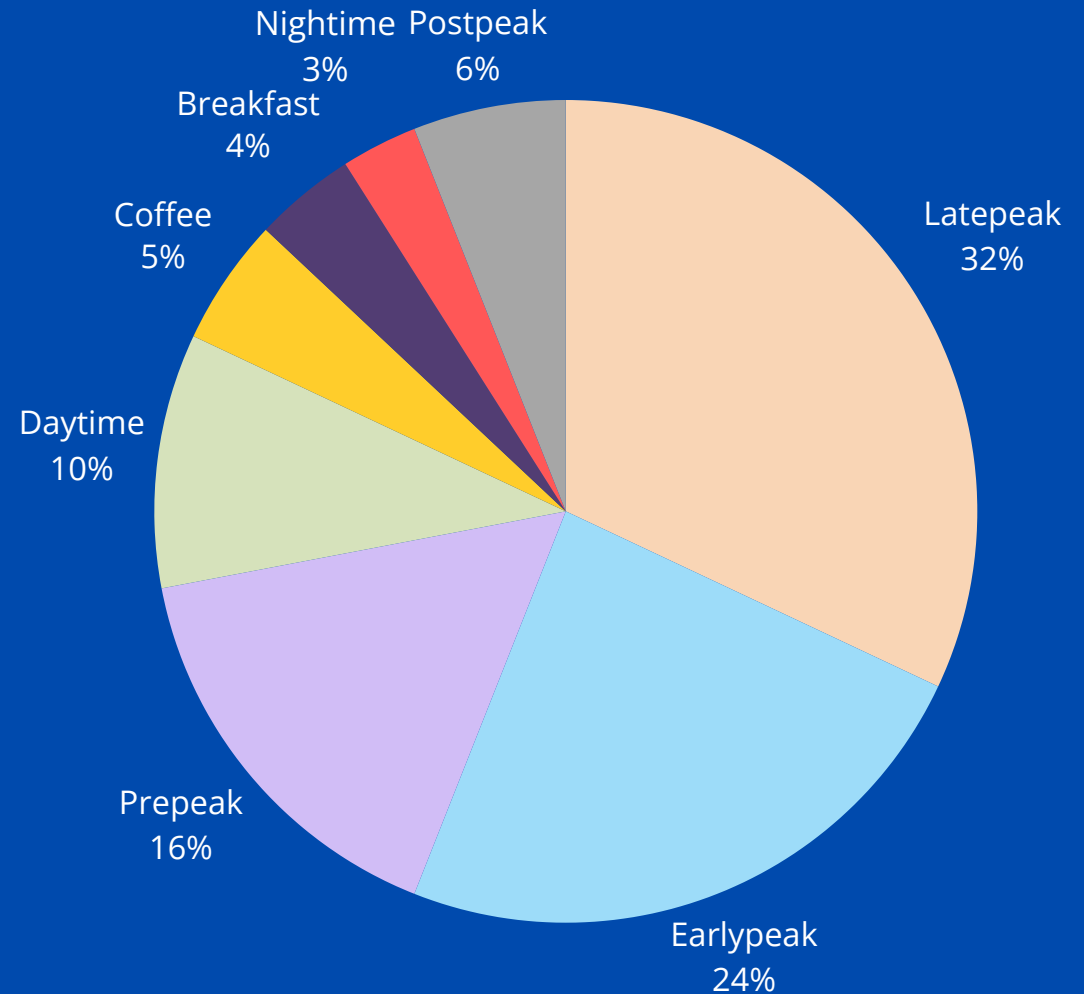
This shows how important (and achievable it is) to set up a suitable TV plan to help attract new customers. The brands that **spend more on TV actually provide the best results**.



Late peak is the travel industry's most popular ad slot

Morning hours are not thought to be particularly crucial for the industry, with early Peak and Pre-Peak also representing a sizable amount of TV investments.

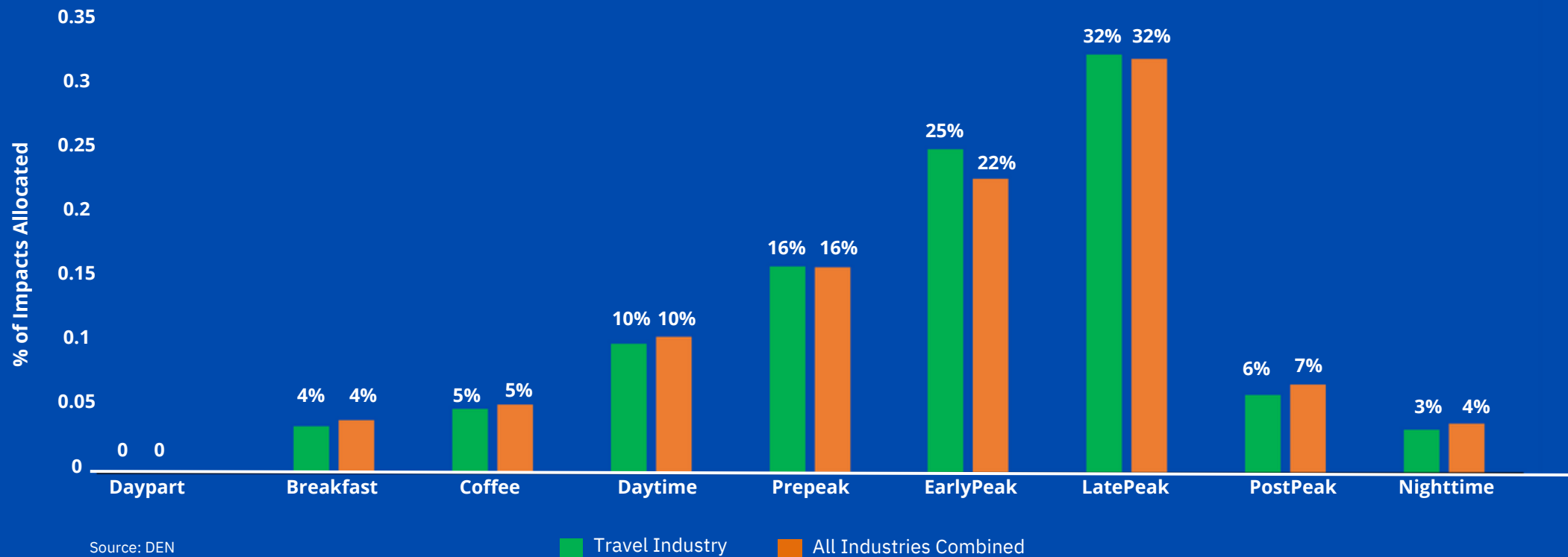
The only difference of note is in the Early-Peak, where the Travel industry invests 8 points more.



Source: DEN

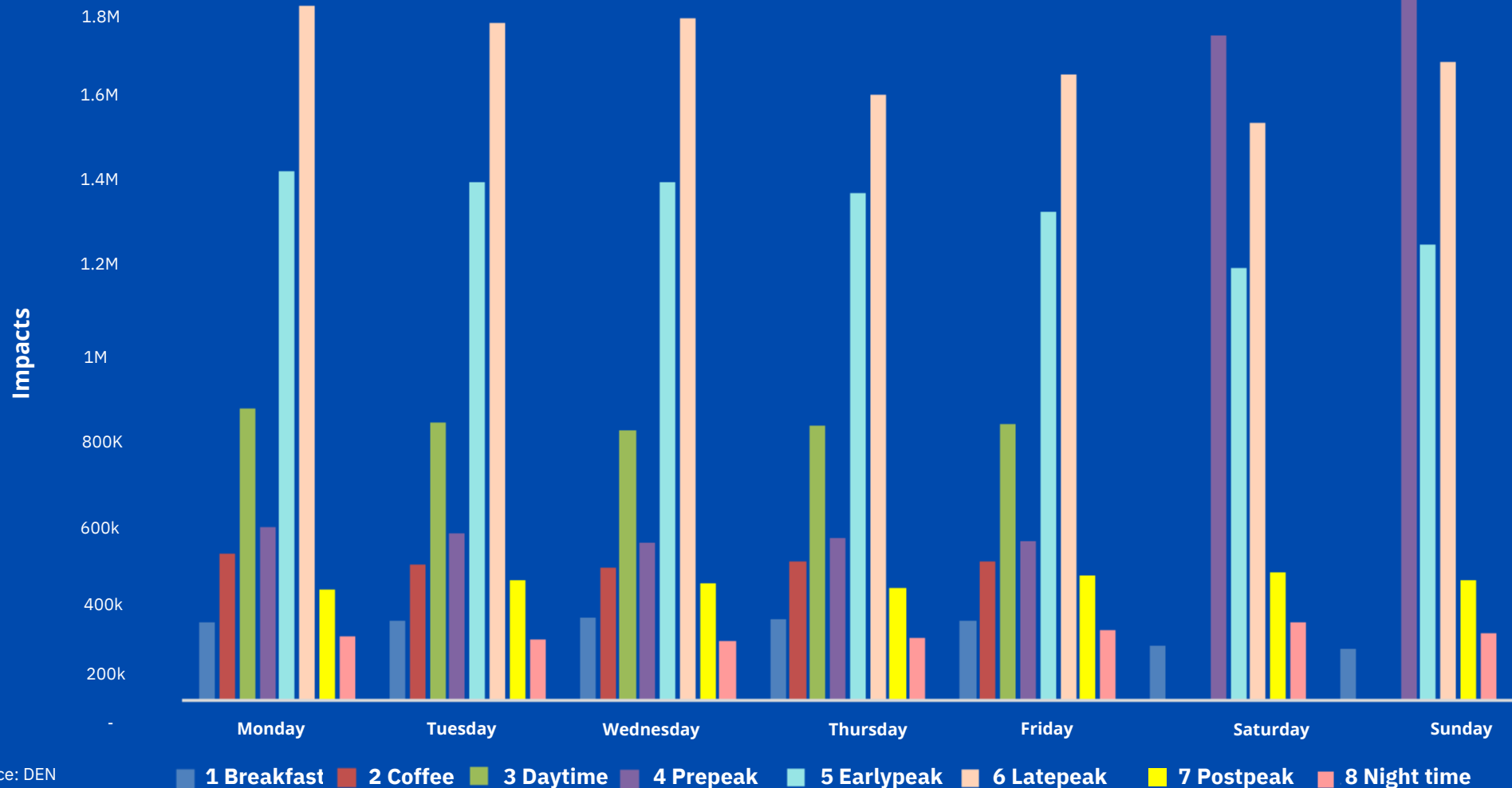
Travel industry vs ALL industries combined

The chart shows the disparity between these three slots and the other dayparts. Looking at the indexed impacts, you can see the Travel industry is closely following the trend of ALL the industries combined.

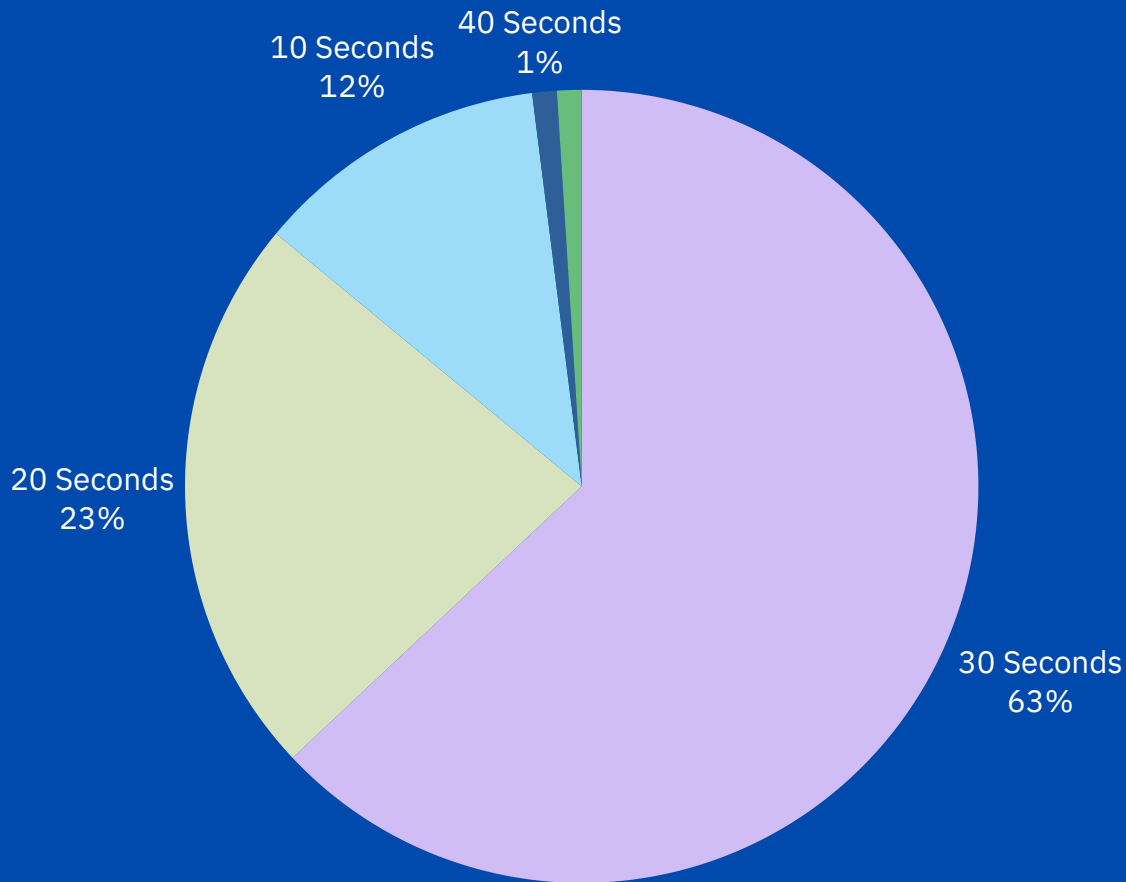


Different strategies for weekdays and weekends

Brands must carefully evaluate what times their target demographic will be watching television. In general, **various audiences watch TV at different times**. It is easy to predict only if advertisers are knowledgeable of their target market. Daytime television programs for example, are usually targeted at **women aged between 18–49 and all adults 55+ so this slot could work really well for some brands in the travel industry**. Weekday daytime TV is typically filled with soap operas, cookery shows, discussions, and game shows. However, weekends feature a more varied lineup, with a focus on sports programming. Peak TV viewing times draw the largest audiences, **with up to 45% of the UK population**, spanning all age groups, tuning in.



30 seconds TV ads are most-used in the travel industry



Source: DEN

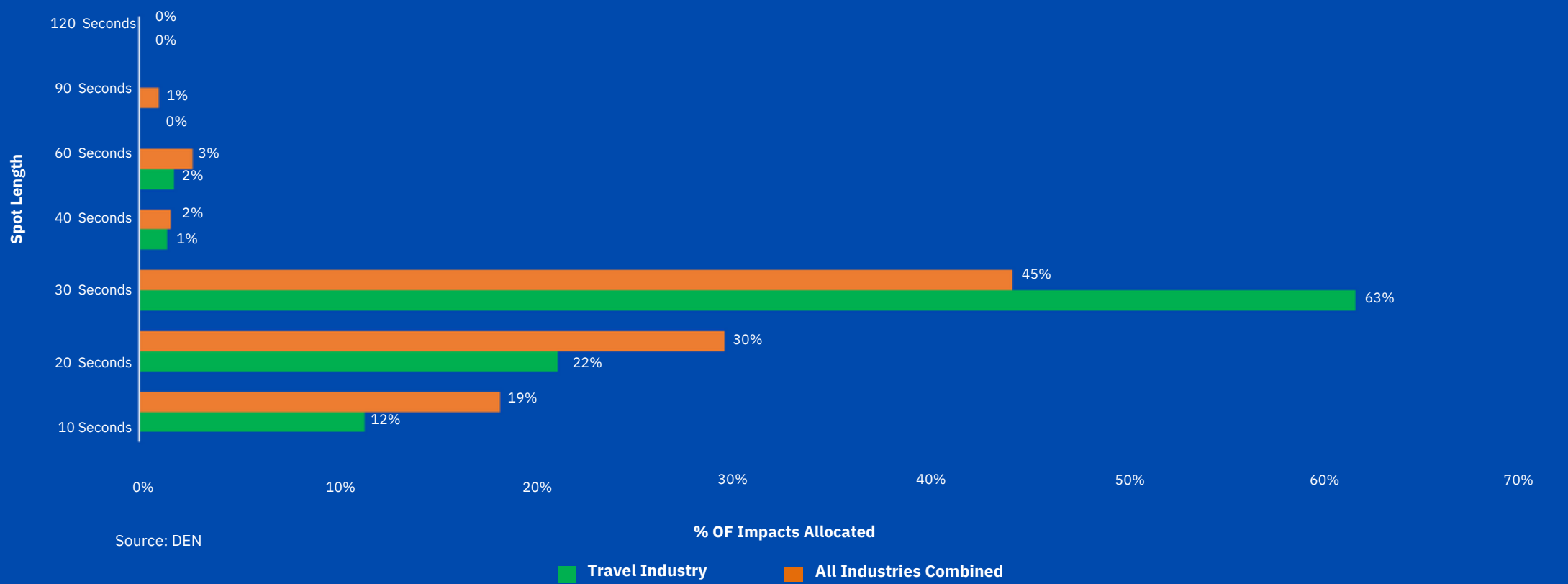
63% of ALL ads in the travel industry are 30 seconds long

The typical '*storytelling or relationship-building*' 60/90 second commercials **don't seem to be a part of the travel industry's advertising strategy.**

When we compare the index impacts allocation for the Travel sector vs **ALL the other sectors combined**, we realised that the same pattern emerged in relation to the 30 second ad length. However, when we look at the 20 and 10 second ads, **we can see a different narrative.**

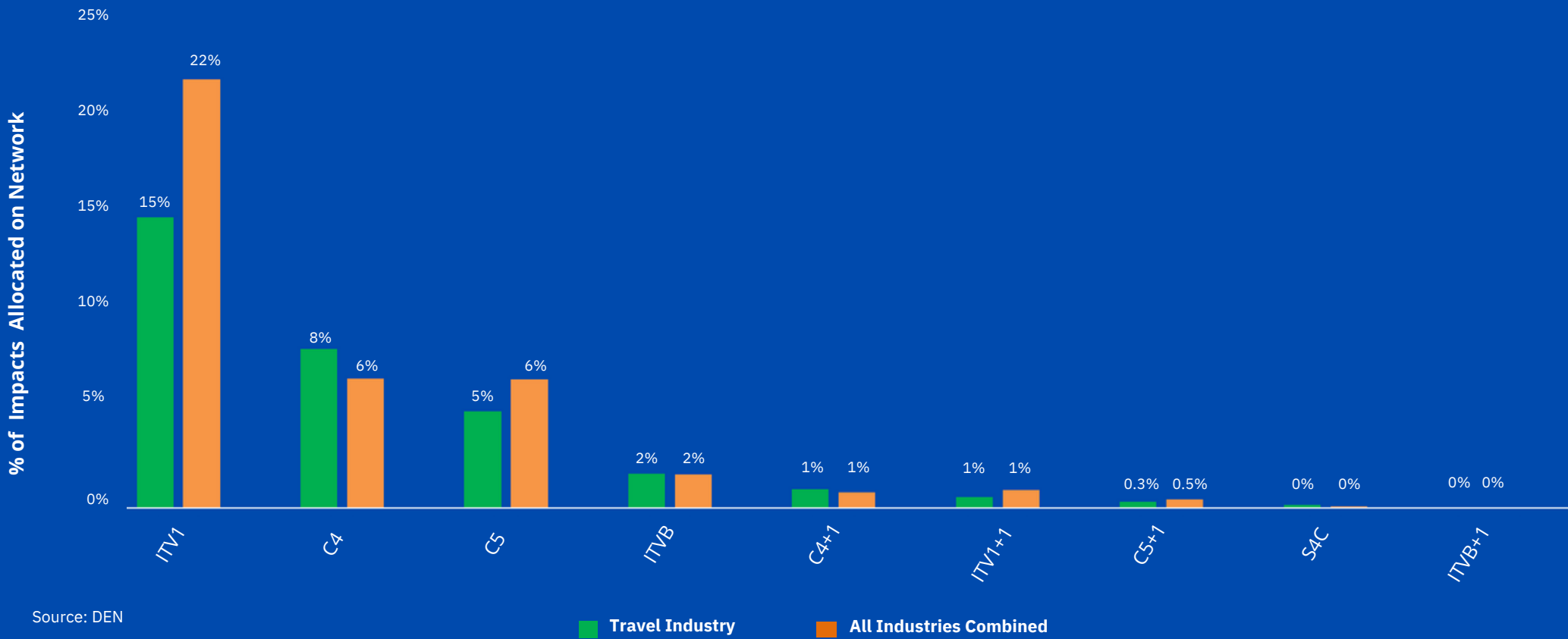
Travel industry doesn't favour 10 - 20 second ads

The Travel industry, under-allocated in the 10 and 20 second department compared to the combined industry average.



The most popular TV channels

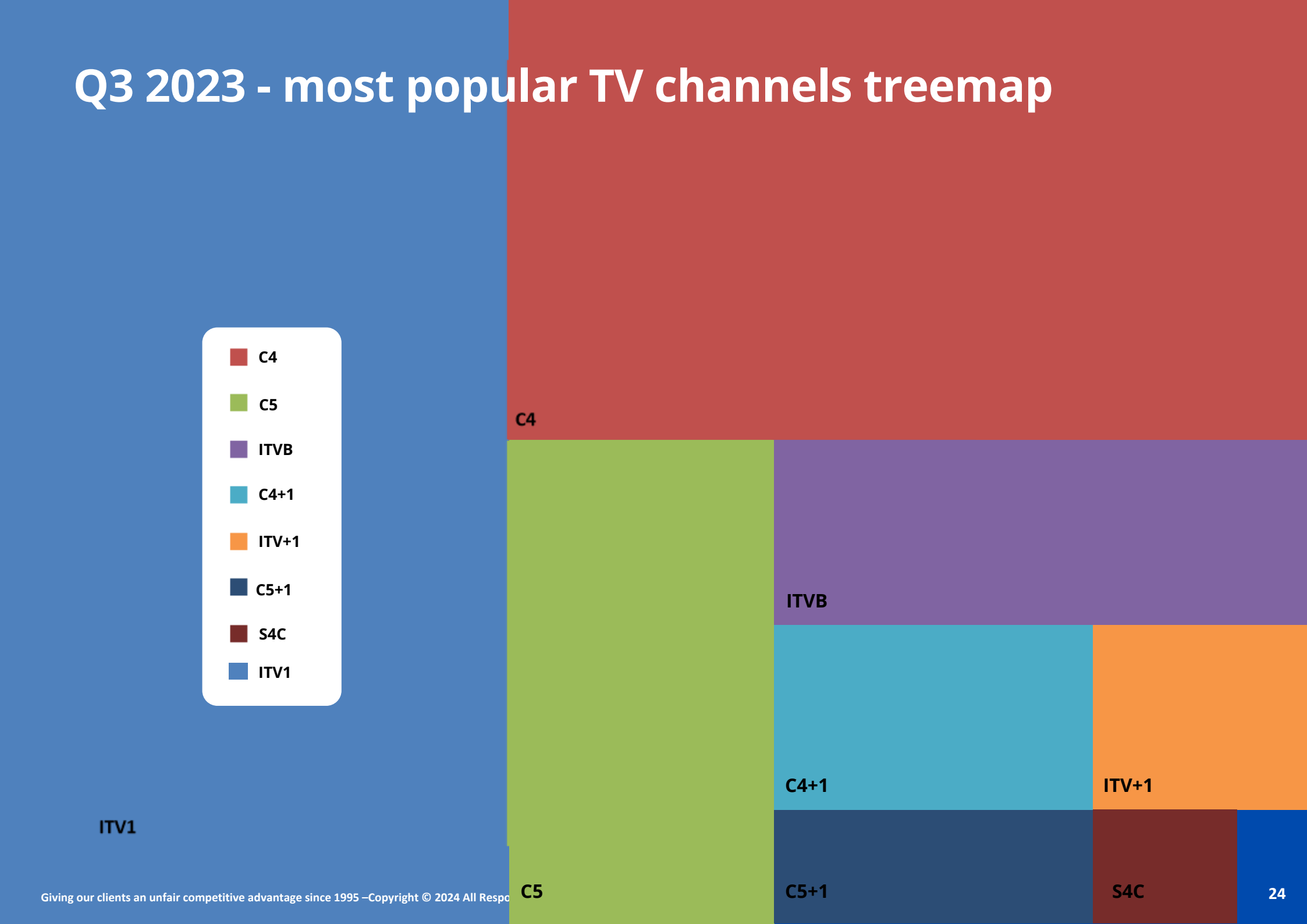
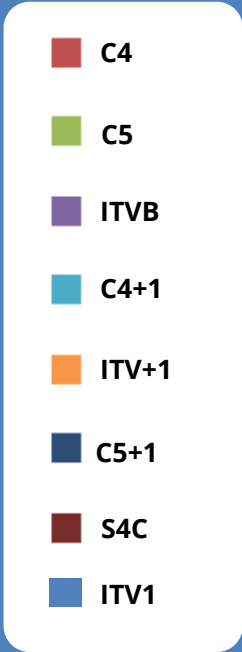
The most watched television channels in the UK include C4, (which is not surprising). Re-runs of old ITV drama series, soap operas, and sitcoms make up the **majority of 5TV and ITV3's content, which is mostly targeted at those over 35's.**



Source: DEN

Travel Industry All Industries Combined

Q3 2023 - most popular TV channels treemap





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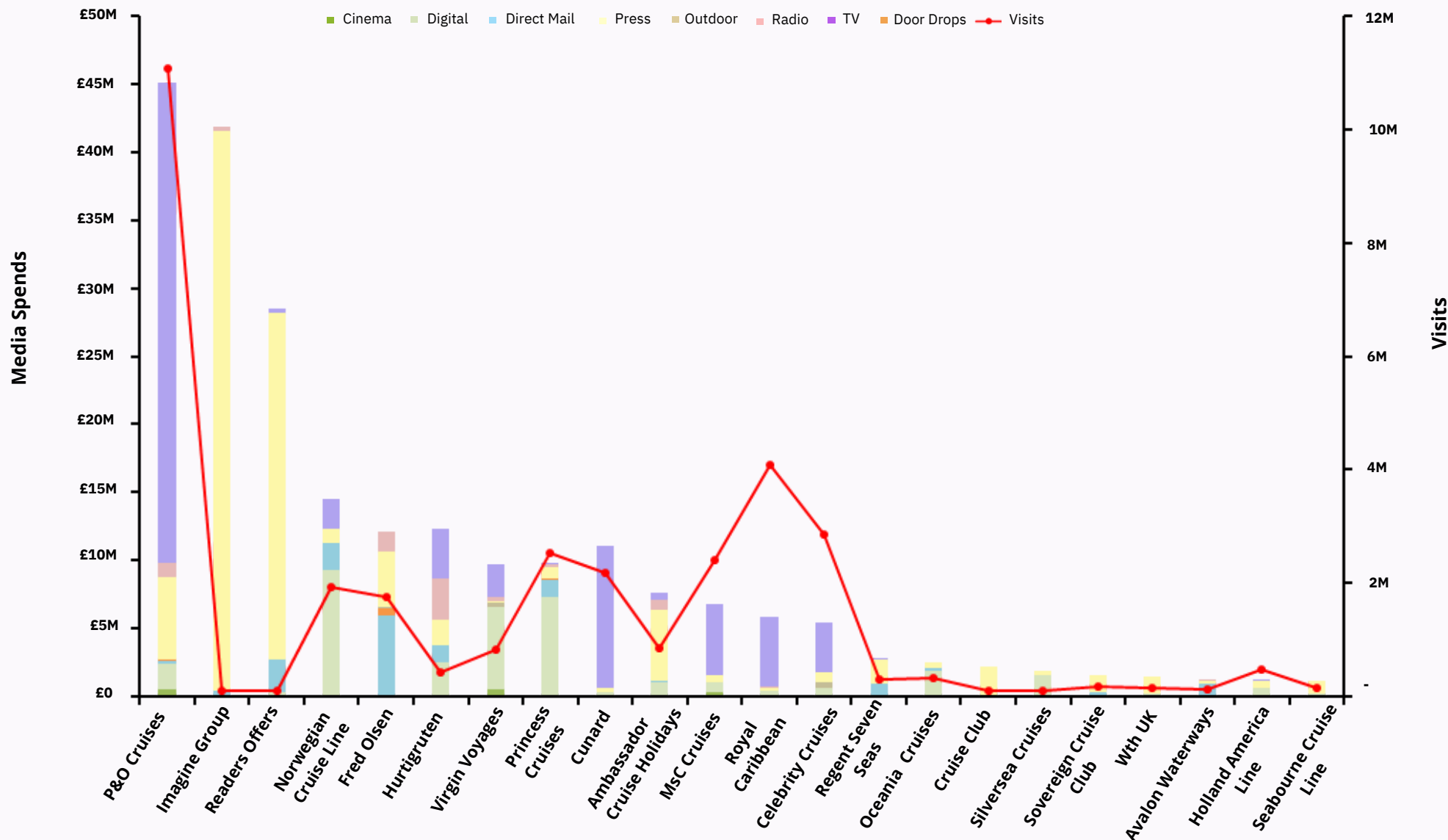
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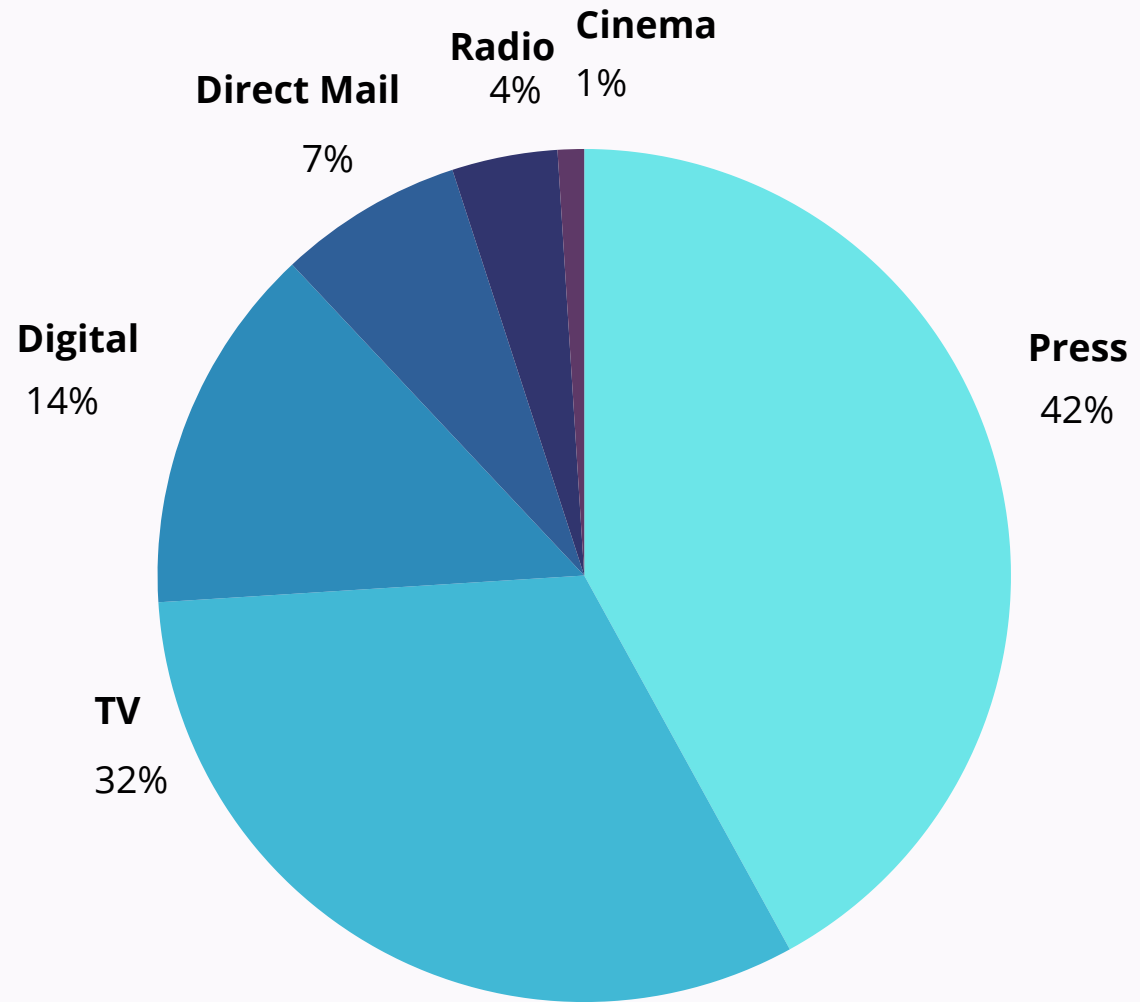
P&O spends the most and reaps the rewards

Although press is the most popular media channel, the results are not as good as they could be. Below, the first graph demonstrates how brands that invest in TV generally achieve **higher results in terms of visits**.



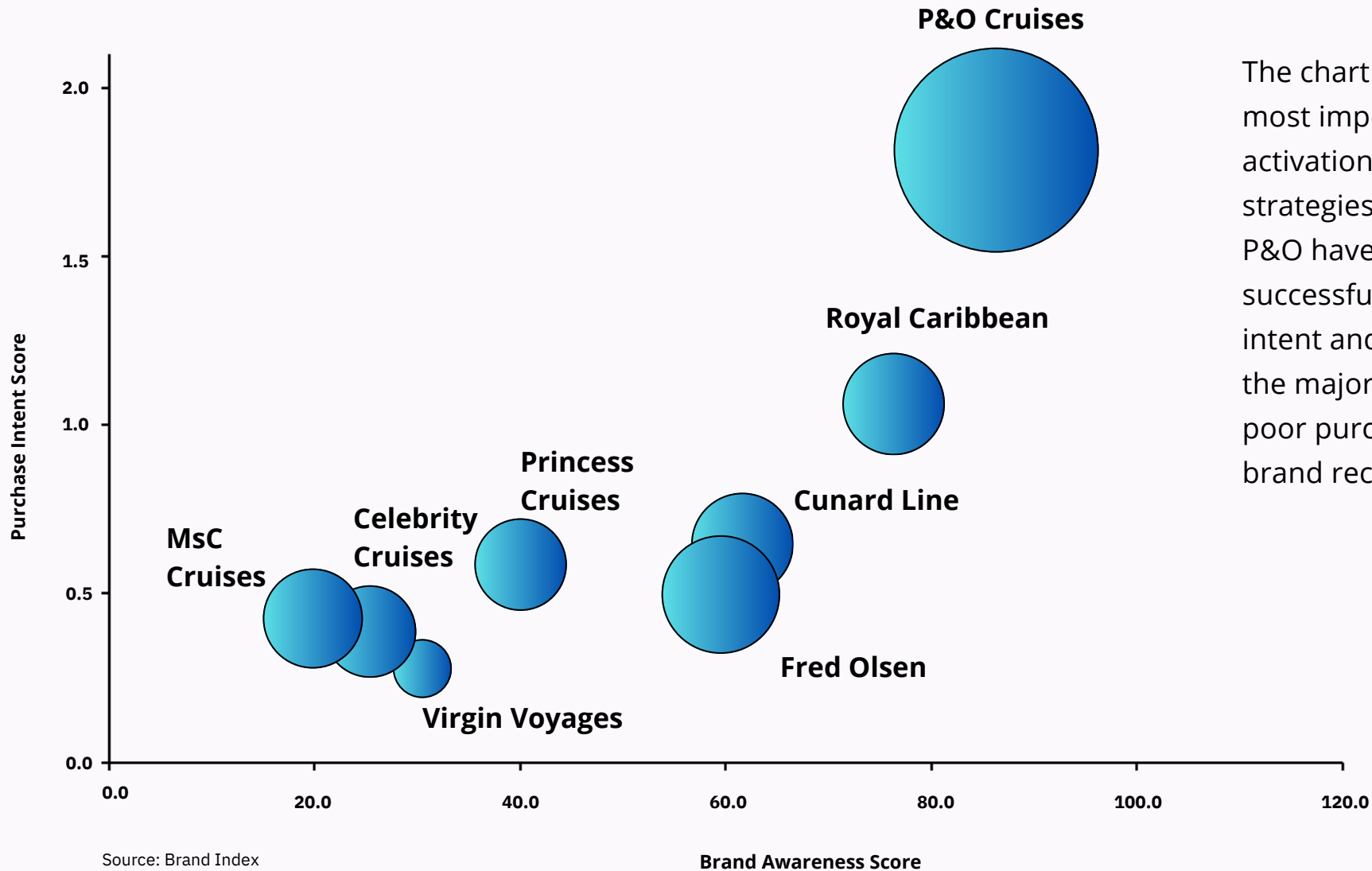
Press is the most popular media channel for travel brands

Media spends by channel for the travel industry in 2023



Source: Nielsen

The two most important metrics for activation and brand-building



The chart combines two of the most important metrics for activation and brand building strategies. You can see that only P&O have been able to successfully combine purchase intent and brand awareness, while the majority of brands exhibit poor purchase intent and very low brand recognition.

An all-encompassing method of audience analysis is purchasing intent



It combines demographic and behavioural data to consider not just the characteristics of your leads but also the steps they take to learn more about your business.



An extremely low purchase intent score shows that a business is struggling to attract new customers and increase their buying intent.

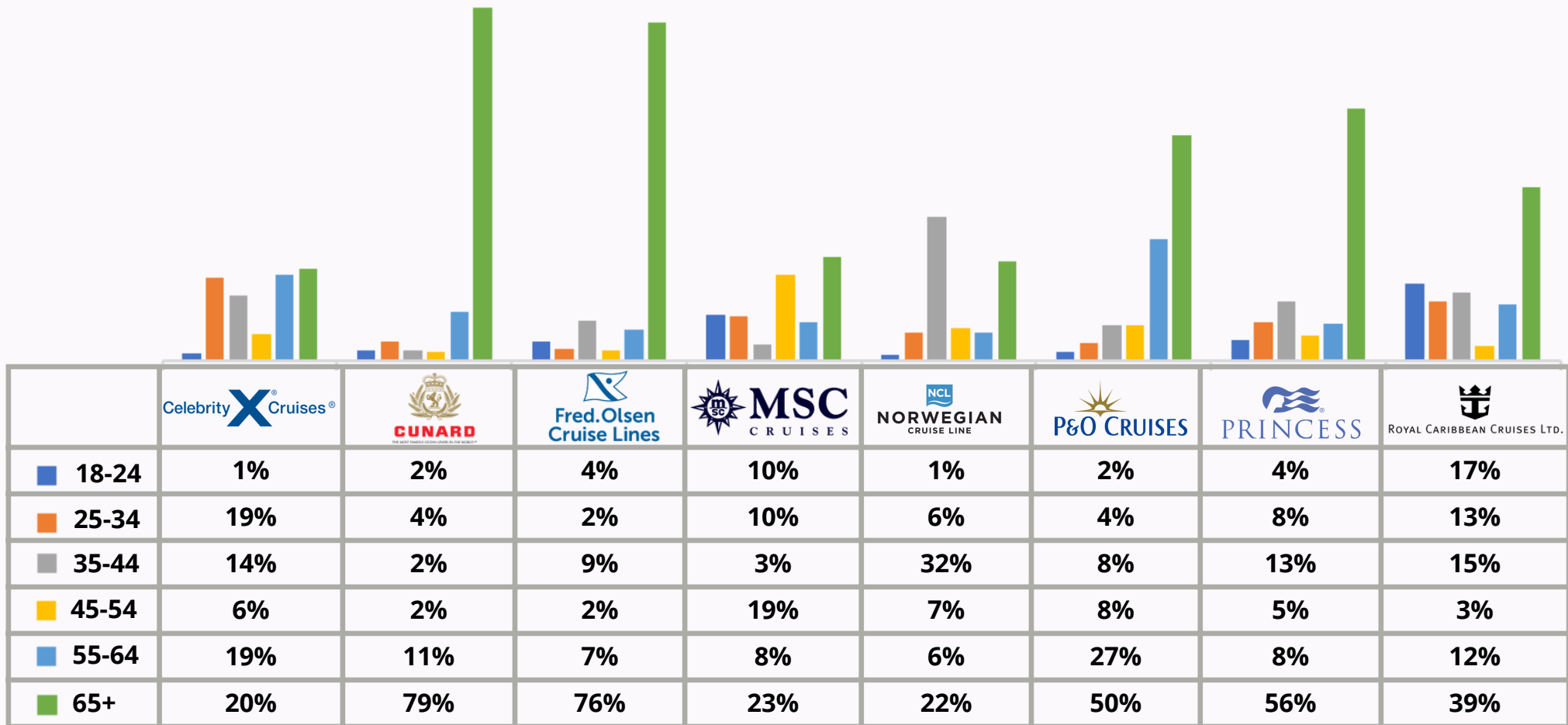


DRTV is one of the best ways to pique the interest of new customers, and when used in combination with a long-term branding strategy, it may yield significant results, increasing awareness too.

Cruise ships aren't only for older demographics

The graph below **disproves the widespread belief** that cruise ships exclusively appeal to those over the age of 55.

People Who Purchased a Cruise in the last 12 months (Aug 22 – Aug 23)



Source: TGI

Target the right audience



Celebrity Cruises, MSC, and Norwegian Cruise Line are three examples of brands that **don't appeal to the 65+ demographic only.**



Targeting the wrong audience can be a costly mistake, **leaving a huge investment in TV ineffective and wasting resources.**



We will also examine companies such as Cunard Line and Fred Olsen, who are **keeping their appeal with a 65+ population** and are performing slightly better in terms of generating brand recognition than the preceding brands.

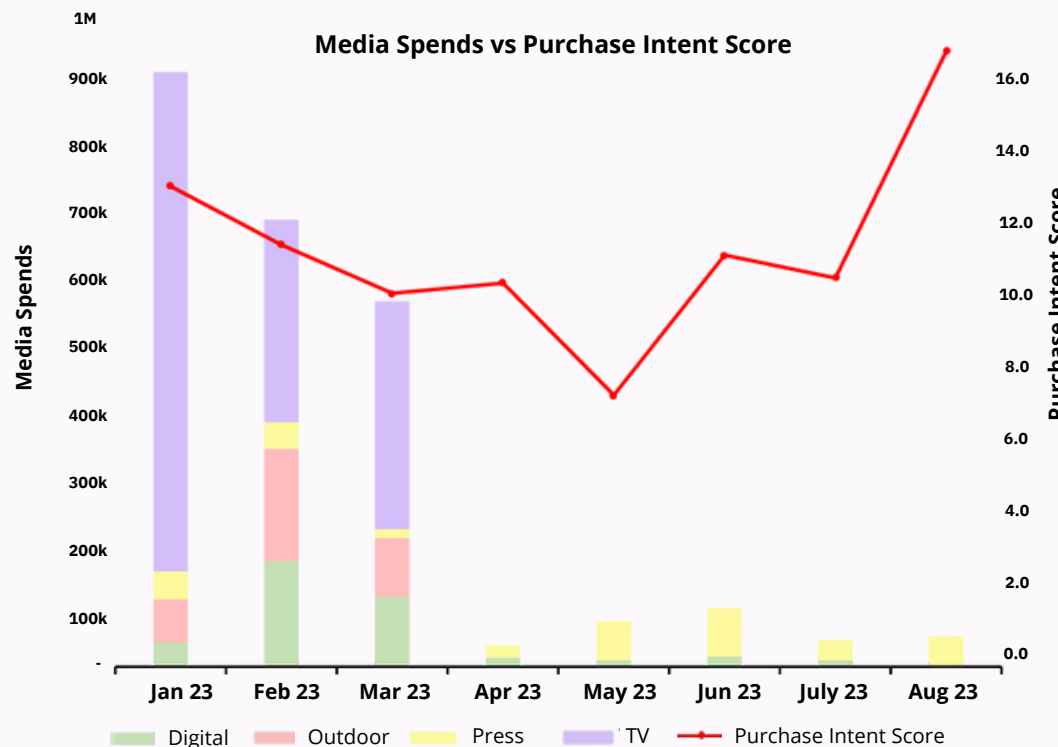
That being said, there's still room for improvement...

TV investment unable to affect purchase intent and web visits

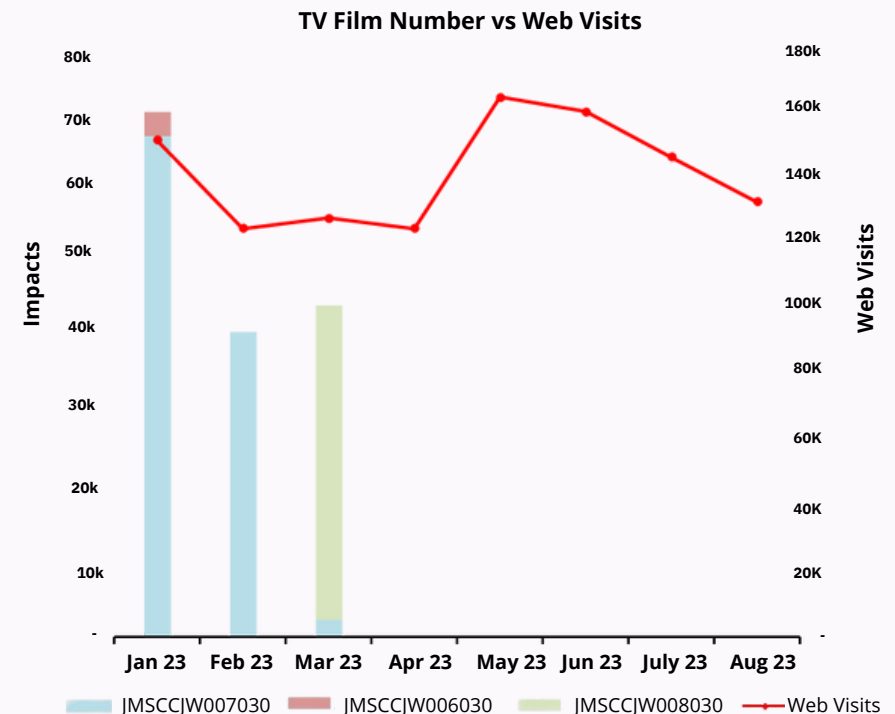
This may imply that the call-to-action strategy has no capacity to influence customers.

However, we can see how during the summer months, these indicators begin to perform **significantly better**, demonstrating that customers gravitate towards Celebrity Cruises when seasonal demand is strong.

But what are the causes for this change in trends?



Source: Nielsen/Brand Index

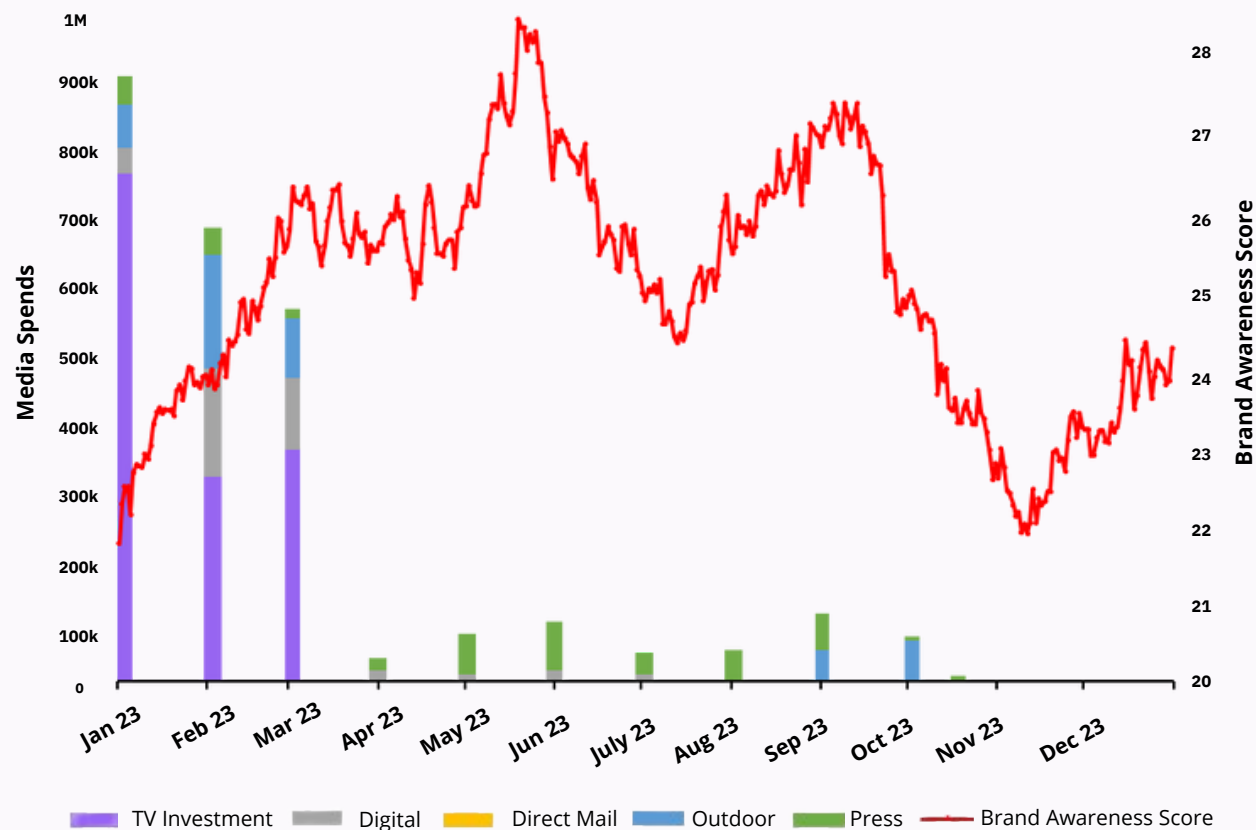


Source: Nielsen/Similarweb

The answer... an increase in Brand Awareness between Jan - Mar 23

This indicates the potential influence on customers, leading them to choose Celebrity Cruises, particularly during peak seasons like the summer months, even in the absence of TV ads.

This might imply that the content of Celebrity Cruises ads was more focused on promoting the brand than delivering a message for a call to action.



A strategic advantage would be to stimulate the call to action in the months **preceding summer**, coinciding with the active advertising period. This approach allows Celebrity Cruises to proactively shape customer choices **ahead of seasonal demand**, gaining an advantage by influencing decisions earlier than competitors. When we examine the creative of the Celebrity Cruises TV campaign, we find how it tends to **focus its attention on the brand**, whilst the strategy of inserting deals and discounts in the creative of the ad, fails to pique the customer's interest.

Source: Nielsen/Brand Index

Celebrity Cruises emphasises brand

But its promotional offers struggle to capture customer interest.

Brand awareness can be achieved with TV ads focused on discounts and promotions with minimal text, but increasing customer action might require a **strategic mix of the two**. We suggest seamlessly integrating discounts and promotions into the overarching narrative of the ad.



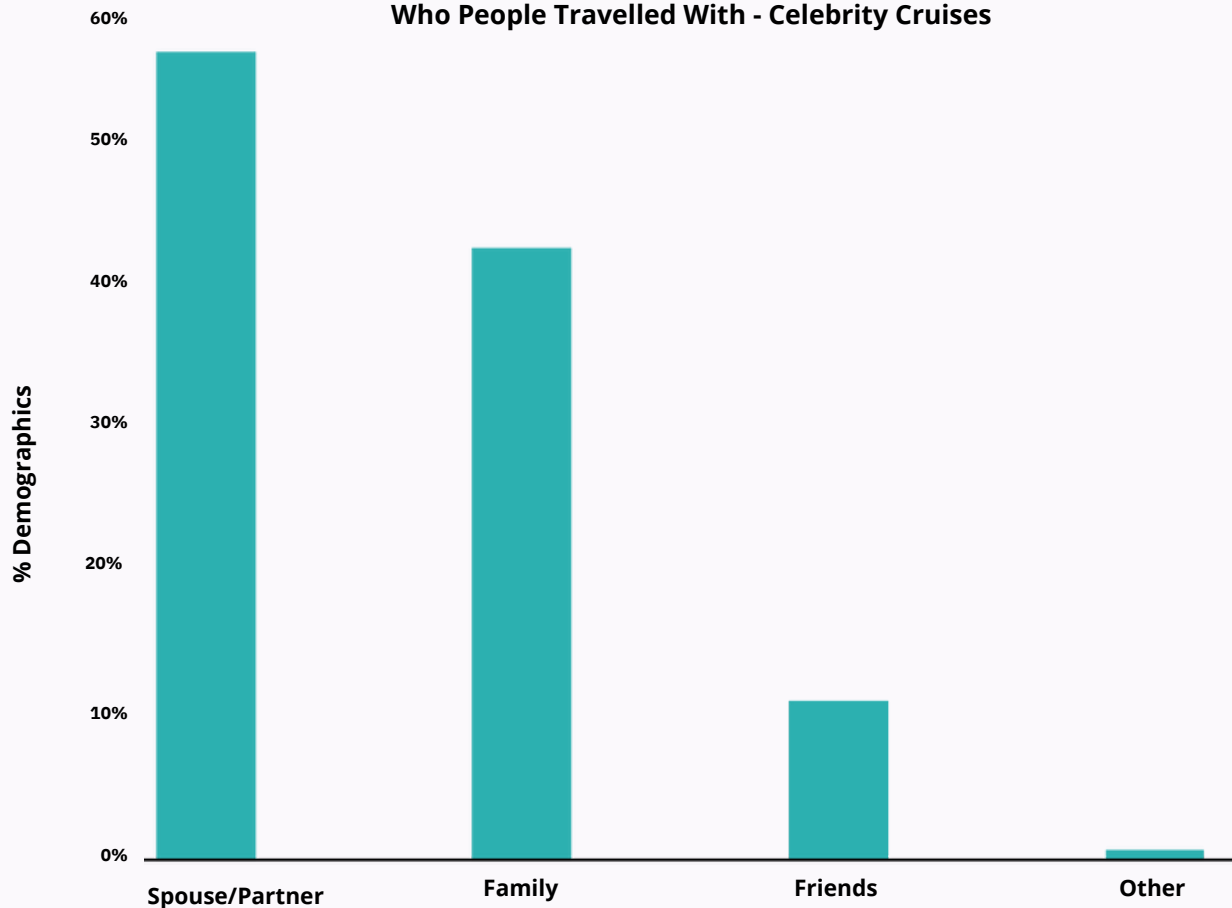
This ensures that it becomes an integral part of the storyline, allowing viewers to grasp the compelling benefits of taking action. Alternatively, consider crafting a distinct ad, employing a different TV strategy plan that seamlessly weaves offers and promotions into a captivating storyline.

The content should be focused on driving a compelling call to action, possibly complemented by a dynamic voiceover. By adopting this strategy, you can create a **unique and engaging television experience that effectively captures audience attention and prompts immediate action.**

To cultivate a customer base, brands must identify the right target audience

The secret to achieving impactful reach within the vast TV-watching population, rests on the nuanced ability to define and resonate with the perfect segment of viewers that align with your brand.

Who People Travelled With - Celebrity Cruises



Source: TGI

Through meticulous analysis of our target audience, a clear trend emerges: **the majority of individuals opting for Celebrity Cruises are Couples and Families with kids.** This valuable insight directs us to refine our focus, with a particular emphasis on reaching families, and more specifically, **parents within the age segment of 25-44.**

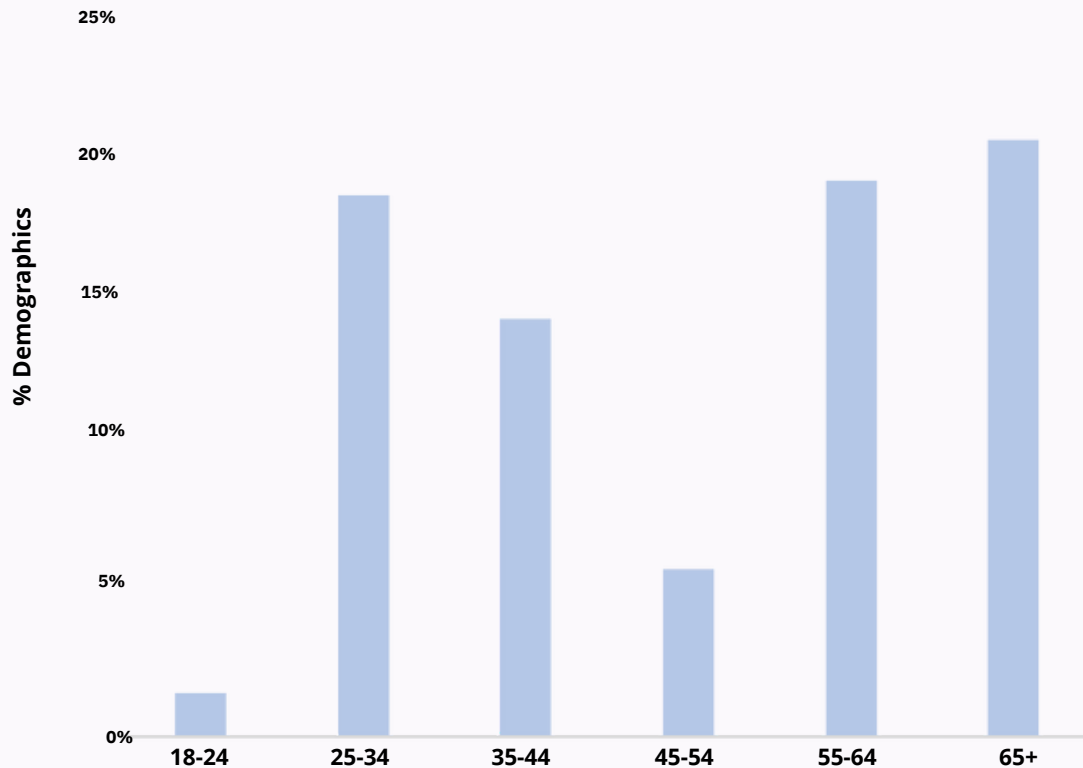
Contrary to conventional beliefs, Celebrity Cruises target demographic isn't limited to older individuals; instead, **we find that their offerings resonate strongly with a diverse range of age groups.** Recognising this, their strategy should pivot towards crafting a **tailored message and experiences that cater specifically to the needs and preferences of families.** This would help ensure that Celebrity Cruises remain the preferred choice for family vacations.

An opportunity for Celebrity Cruises to reach the 25-44 audience

Our data confirms that the age range of 25-44, which represents the family segment and a large audience for Celebrity cruises, is not being **properly reached from the TV Campaign between Jan 2023 and Mar 2023**.

The family segment decided to book a Celebrity Cruise at the last minute when no TV advertisements were airing. This shows that the **seasonal desire to plan a vacation**, rather than an advertising strategy, is what drives visits and purchase intent.

Demographics choosing Celebrity Cruises for Holidays



Source: DEN

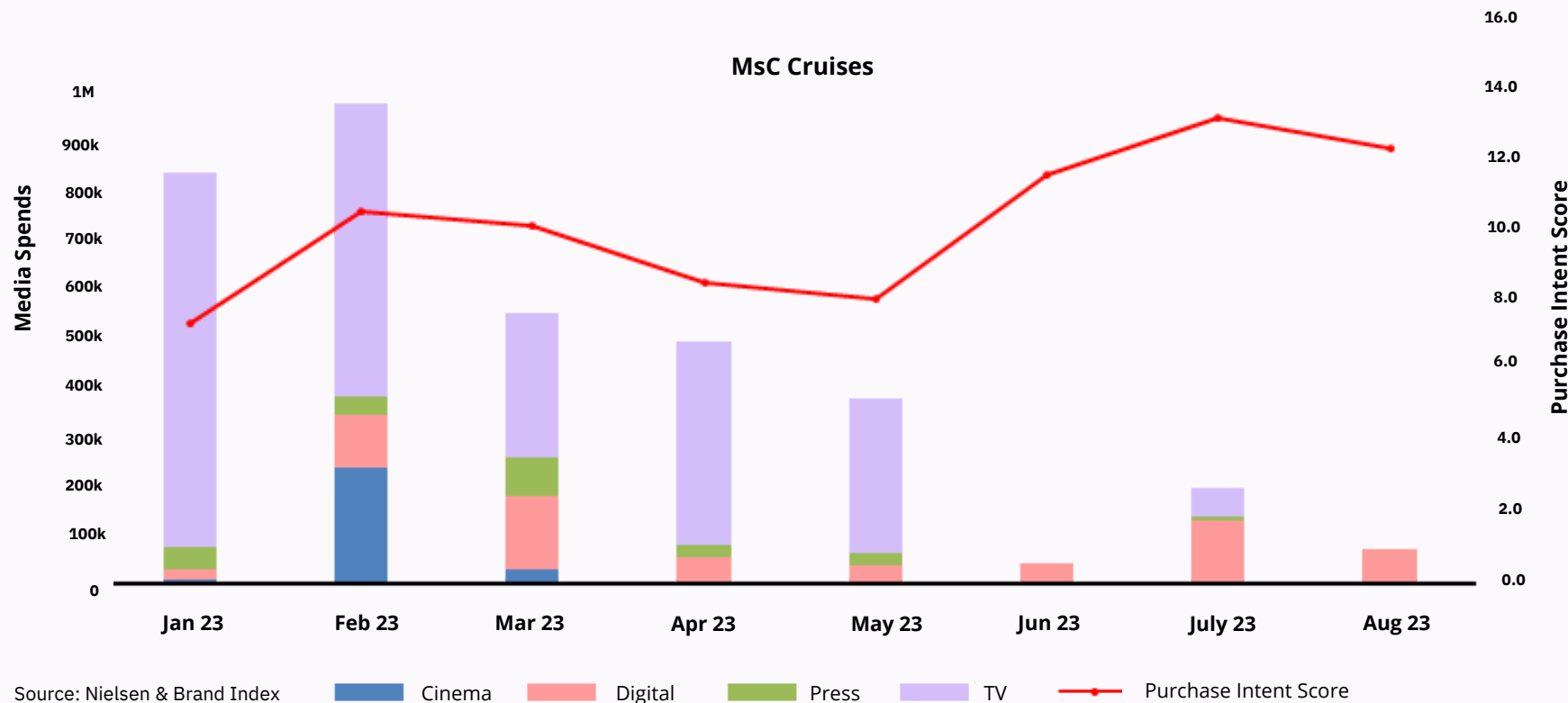
BaseOne+ represents ALL adults aged 18-65+

Group	BaseOne+	BaseOne+Profile	BaseOne+Index
4-15	0.00	0.00	0.00
16-24	1.00	3.20	26.90
25-34	1.60	5.00	31.60
35 -44	3.30	10.50	65.60
45-54	5.20	16.30	103.20
55-64	7.40	23.60	143.00
65+	13.10	41.40	172.50
SexM	15.00	47.50	97.30
SexF	16.50	52.50	102.50
AB	6.50	20.50	78.80
C1	8.10	25.60	83.40
C2	7.10	22.60	107.10
D	4.90	15.70	121.70
E	5.00	15.70	168.80
Total	31.50	100.00	100.00

N.B everything under 120 indicates under reaching in BaseOne+Index column

MSC Cruises strategically employed a brand-focused TV approach between January and May 2023. Notably, their 60-second spot not only showcased the brand but also extensively highlighted the various services the cruise has to offer. This consistent investment in TV advertising (especially in the months preceding summer) serves a dual purpose. Firstly, it contributes to building robust brand awareness. Secondly, to significantly influence purchase intent, particularly when faced with a high seasonal demand.

Purchase intent can be used as a key indicator to measure customer responsiveness to the call to action.

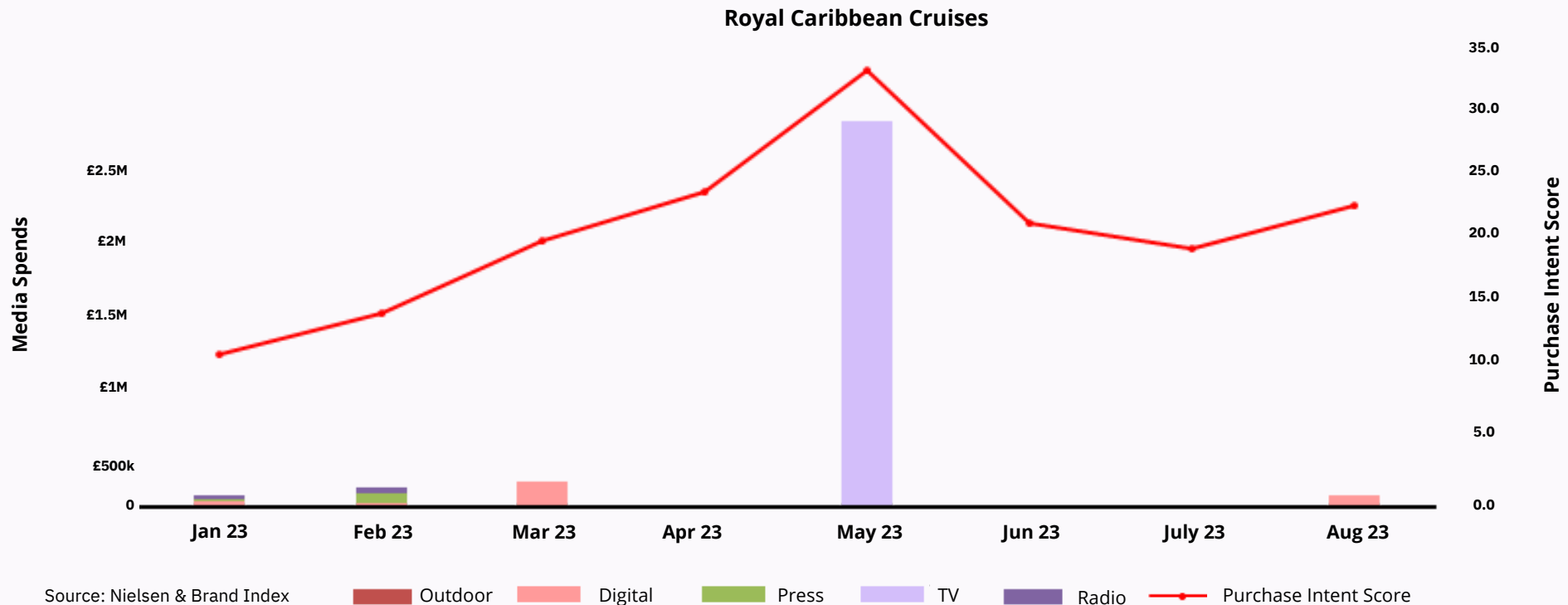




ROYAL CARIBBEAN CRUISES LTD.

While purchase intent for MSC Cruises continued to rise during the summer months, Royal Caribbean experienced a notable decrease immediately following the TV commercial in May.

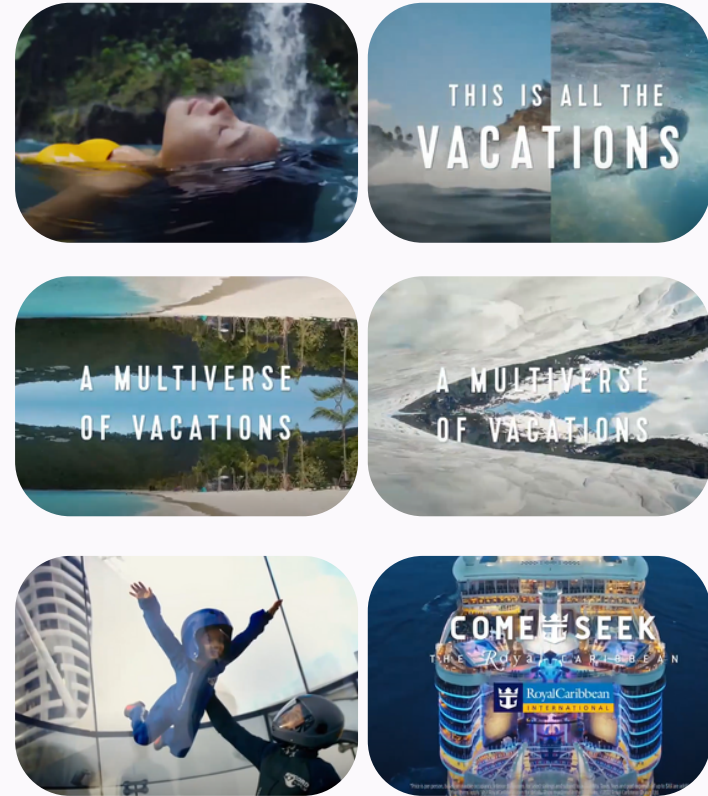
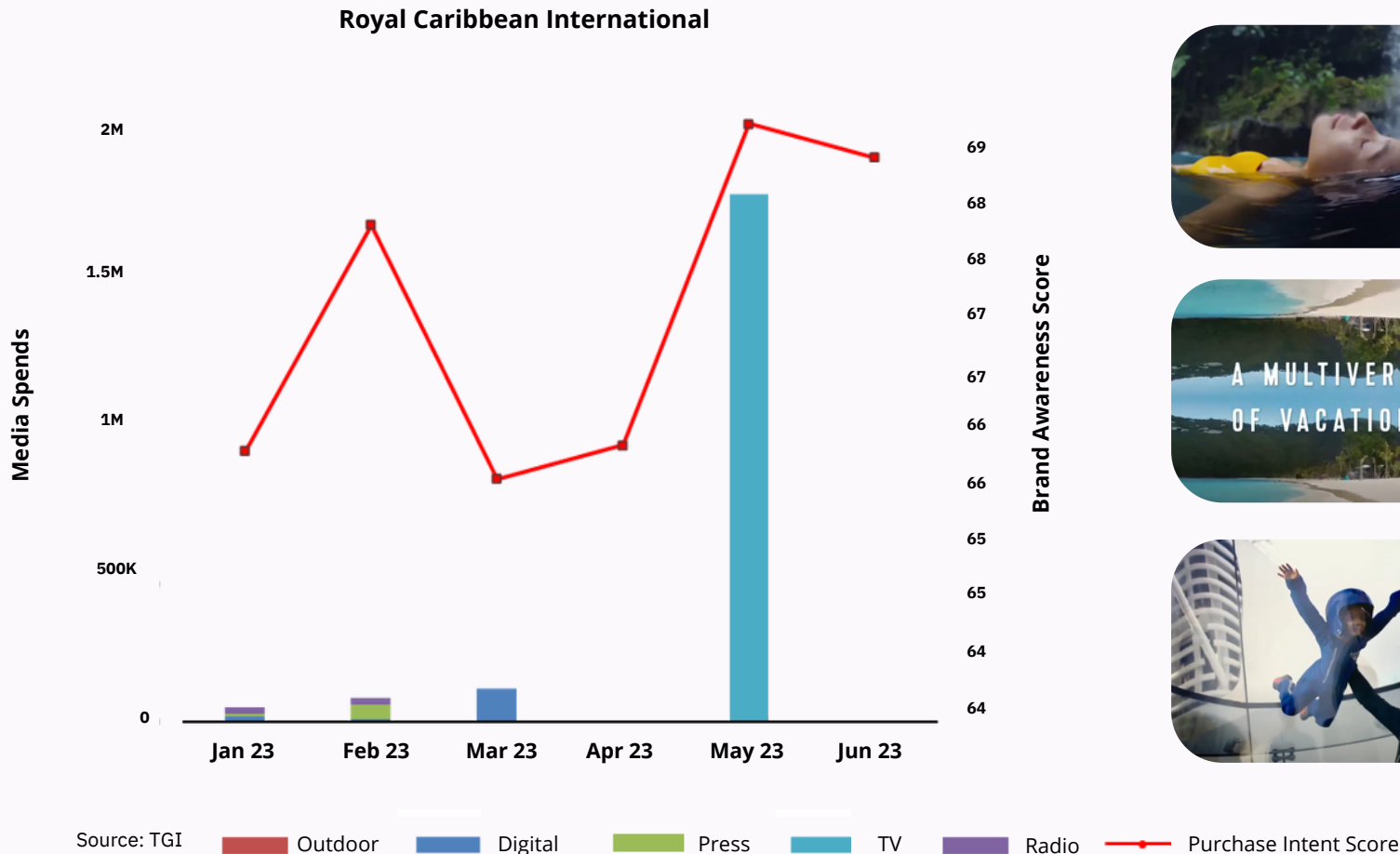
Royal Caribbean demonstrated the ability to influence its purchase intent score drastically in the month of May. However, the effectiveness of this impact was hindered by a lack of consistency in their TV advertising strategy in the months leading up to summer. The decline in interest immediately following the TV ad in May, suggests that without a continuous and strategic TV plan to build anticipation and awareness, the brand struggled to retain consumer engagement during high-demand (seasonal) periods.



**Don't focus solely on brand-building.
Failing to balance your media plan with
an activation strategy can negatively
impact buying decisions**

Royal Caribbean's TV investments impact beyond moment of airing

We advise Royal Caribbean to strategically **increase its TV visibility in the months leading up to summer**. This proactive approach involves maintaining a consistent presence to capitalise on the enduring effects of TV advertising. The goal is to firmly imprint the brand in viewers' minds, fostering heightened recognition and recall.



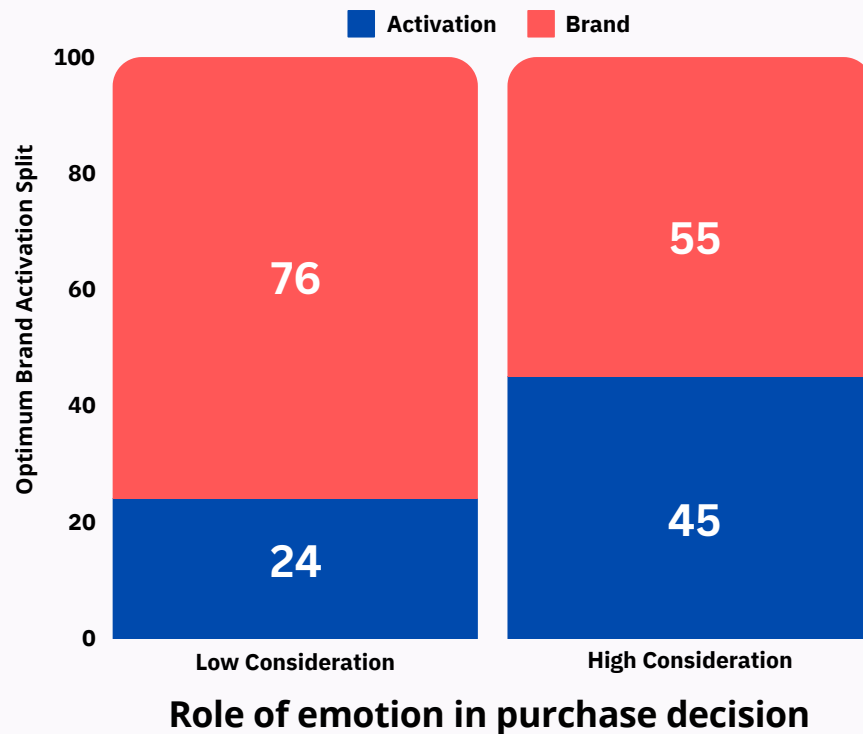
The key is a balance between activation and brand strategy

Especially for brands that are active in the travel industry



Malcolm Landers
Director

“The Brand Strategy is crucial for creating an emotional connection with potential travellers but at the same time Activation Strategy in the travel sector is **vital for prompting immediate responses, especially considering the competitive and dynamic nature of the industry.**”



“Time-sensitive promotions, exclusive offers, and clear calls to action can drive bookings and engagement. In sectors where brand building is streamlined, especially when emotions guide purchase decisions (e.g., gifts, jewellery, or travel), adjustments can be personalised to align with the emotional impact of the decision.

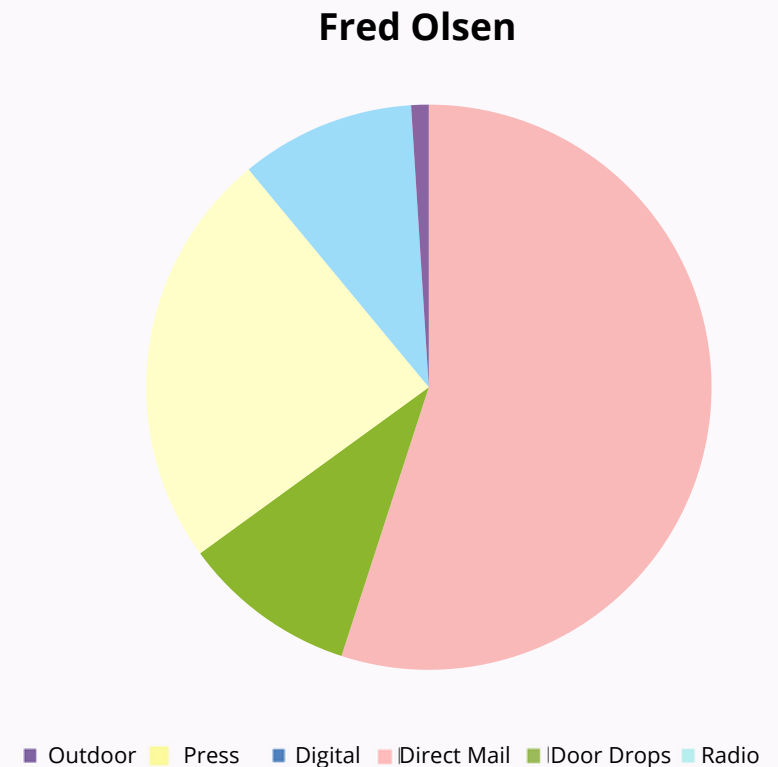
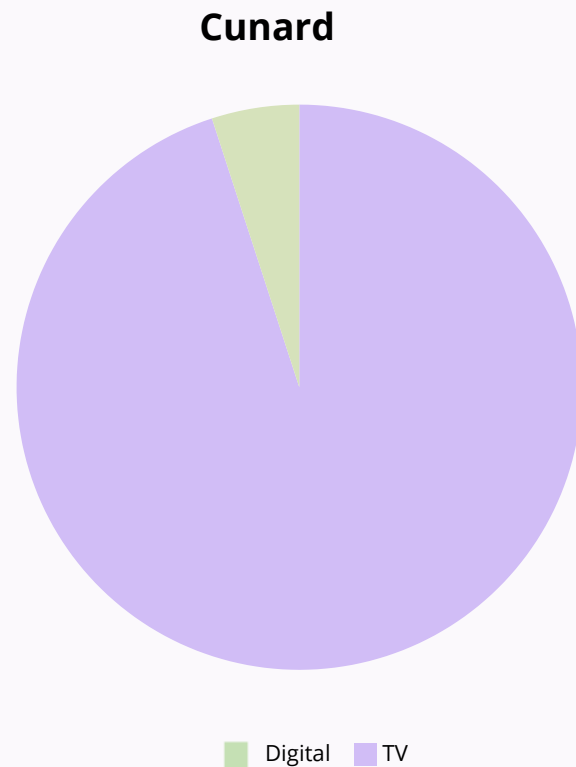
Conversely, in lower-involvement decisions with less emotional intensity — such as choosing a film or a restaurant — the relative influence of emotion tends to be lower.

In situations where emotion plays a pivotal role — like selecting a honeymoon destination, choosing a thoughtful gift, or planning a holiday with loved ones — activation efforts should be heightened. Consumer behaviour often follows a pattern where the category is considered first, and brand decisions come after. In this example, the initial thought is about booking a holiday, leading to subsequent brand-level choices.”

Fred Olsen & Cunard appeal to 65+ audience

The media strategy for the two brands appears to differ even if they are **speaking to the same target group**.

Cunard relies exclusively on TV and Digital, whereas Fred Olsen relies on a wider media mix, leading firstly with Direct Mail, and Press.

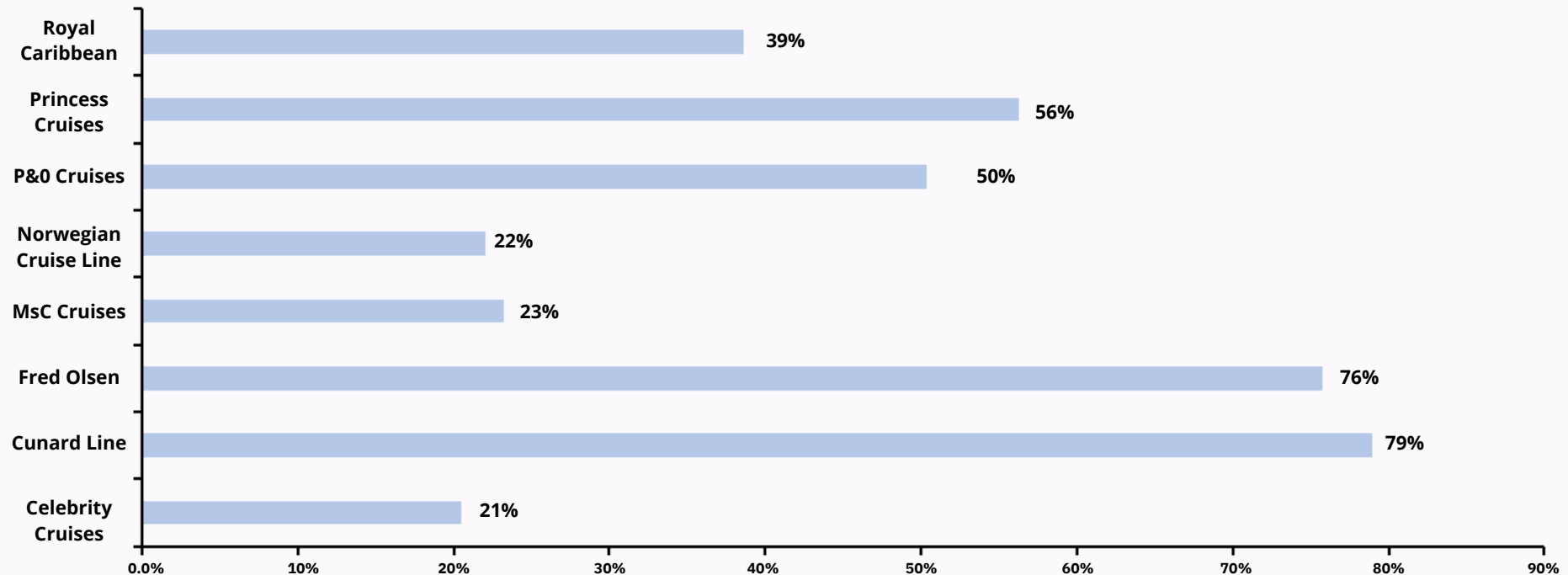


Source: Nielsen

Which cruise brands appeal the most to the 65+ demographic?

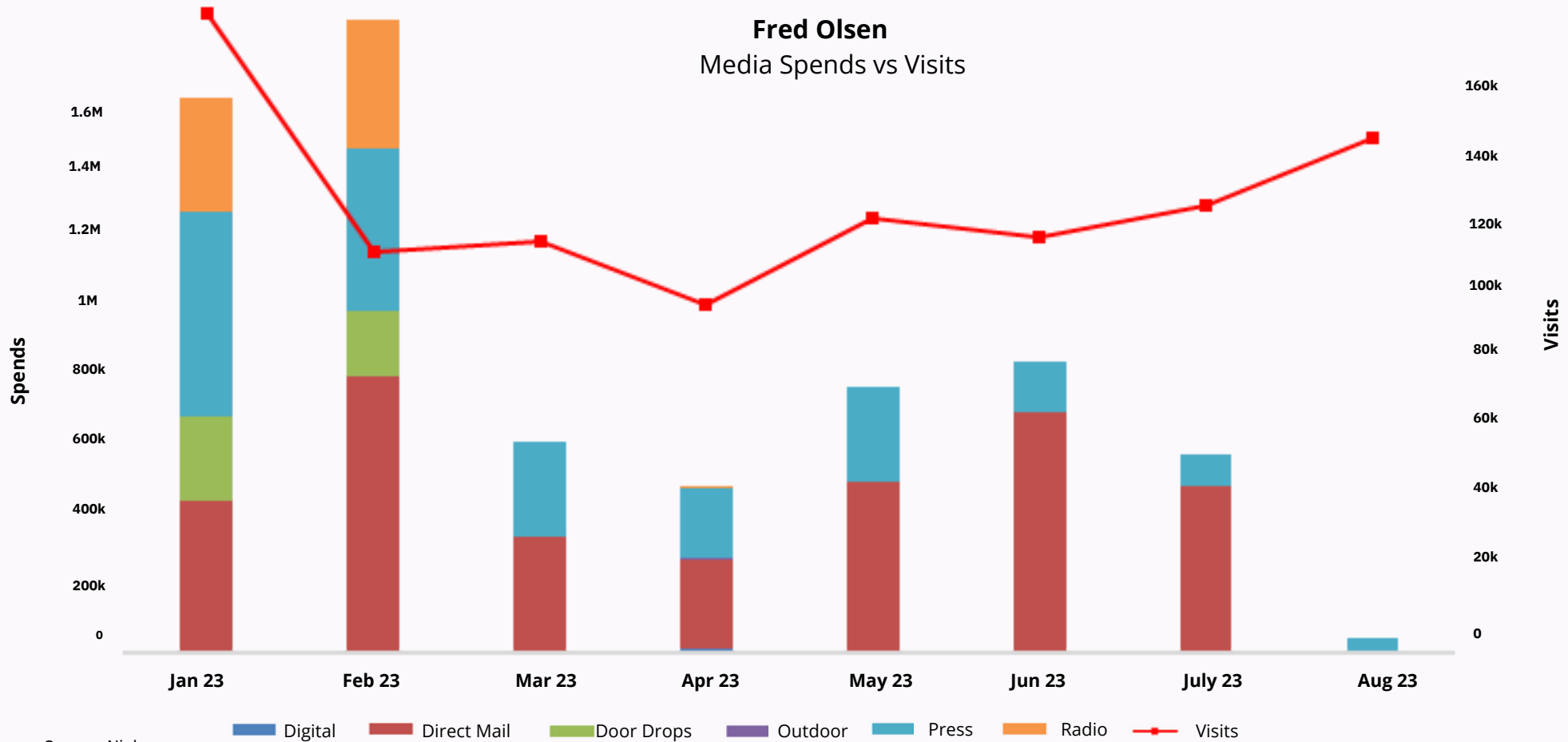
Look at how these two brands compare to their competitors when it comes to **appealing to the 65+ audience**.

% of the 65+ Segment Choosing the Brand Among the Total Population



Source: Nielsen

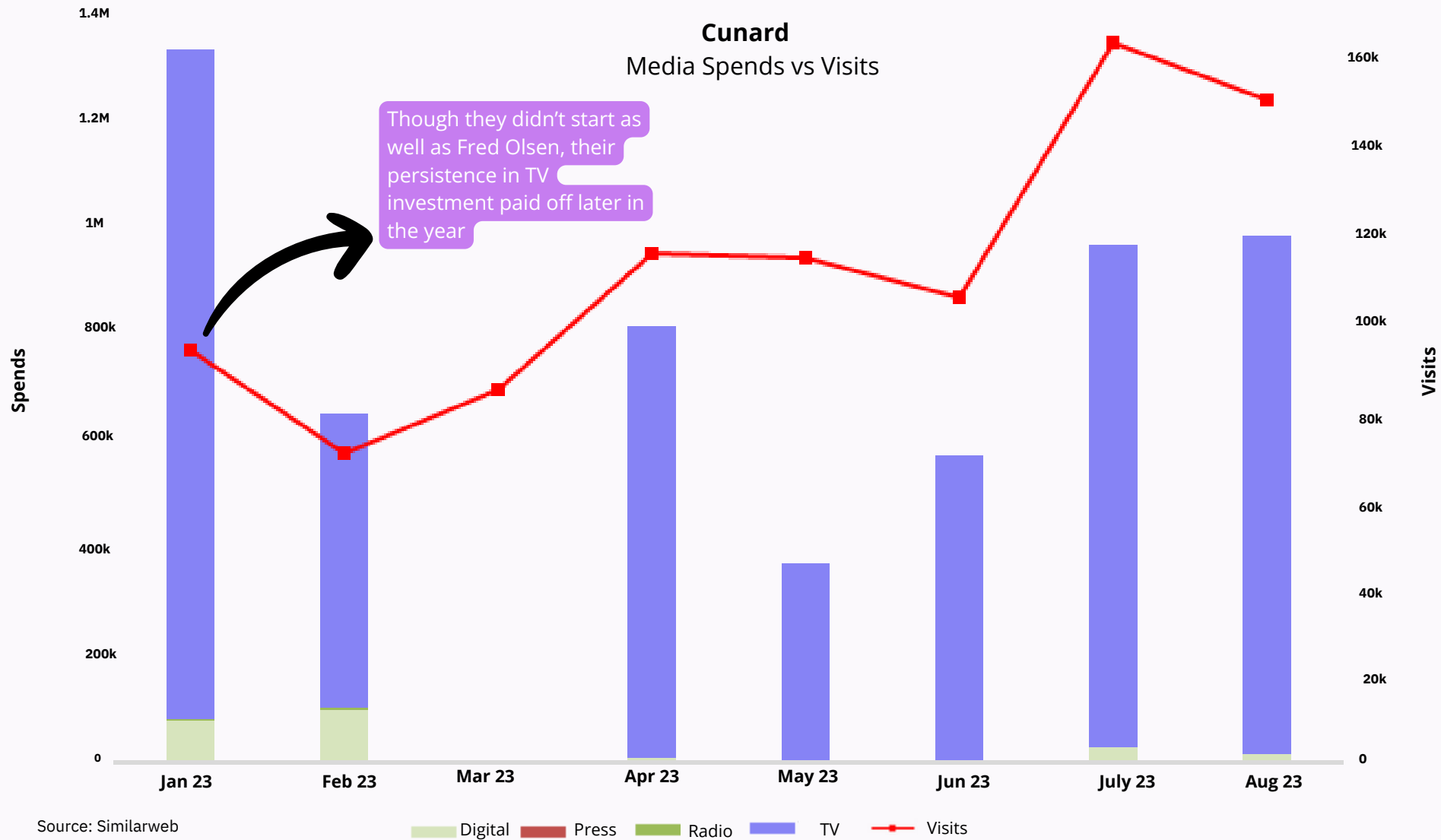
Fred Olsen - month by month



In the first month of the year, (when planning for the holidays are in full swing), Fred Olsen is doing well, considering there's no seasonal demand in January (it's largely still a time for planning).

However, by concentrating only on direct mail during the remaining months of the year, it was **unable to effectively increase visits**.

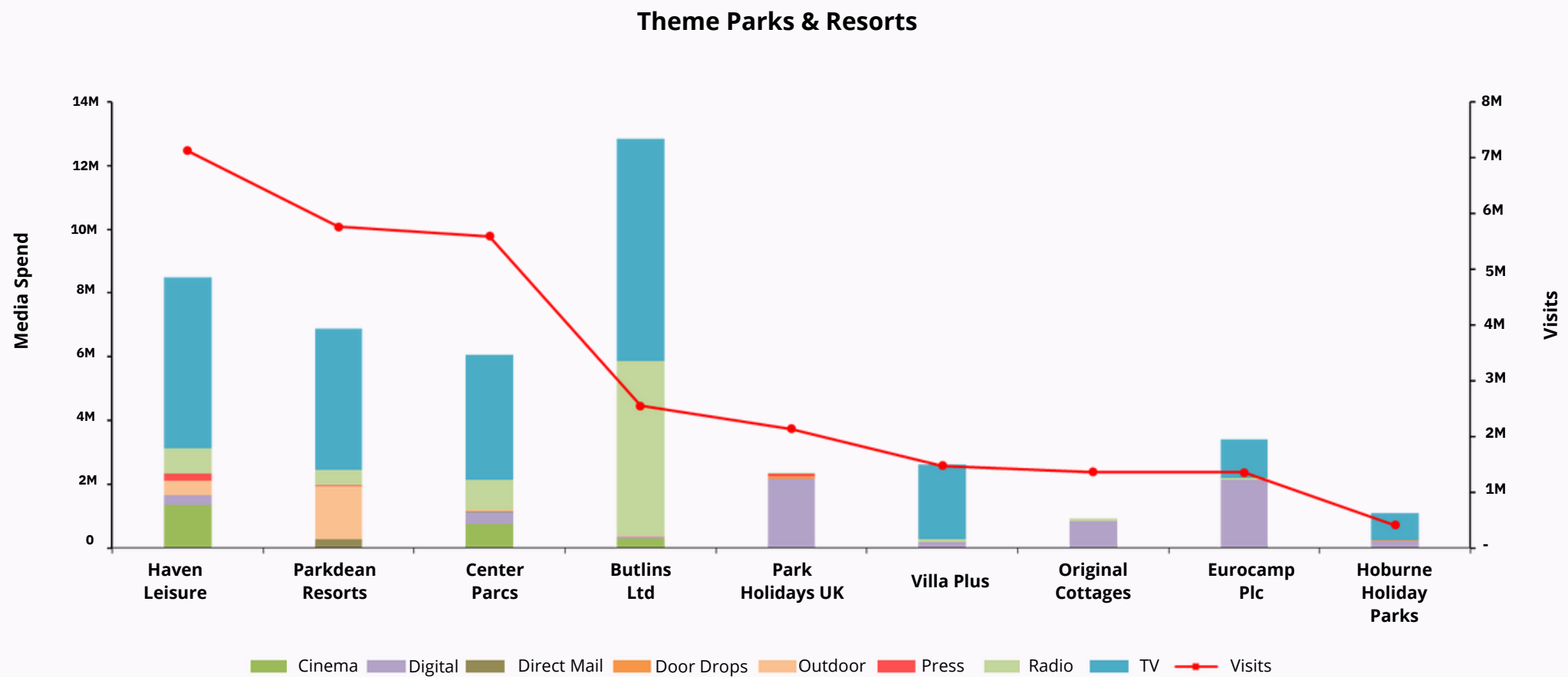
Cunard - month by month



Cunard shares the same segment of audience (+65) as Fred Olsen, but the difference is that Cunard is highlighting how TV investment can be profitable and importantly, **capable of generating visits**.

TV working with multi-media is a winner

TV is able to push up visits even more when combined with others media channels. The brands that are performing better and reaping the higher visits are brands that are investing heavily (and primarily) in TV.



Source: Nielsen

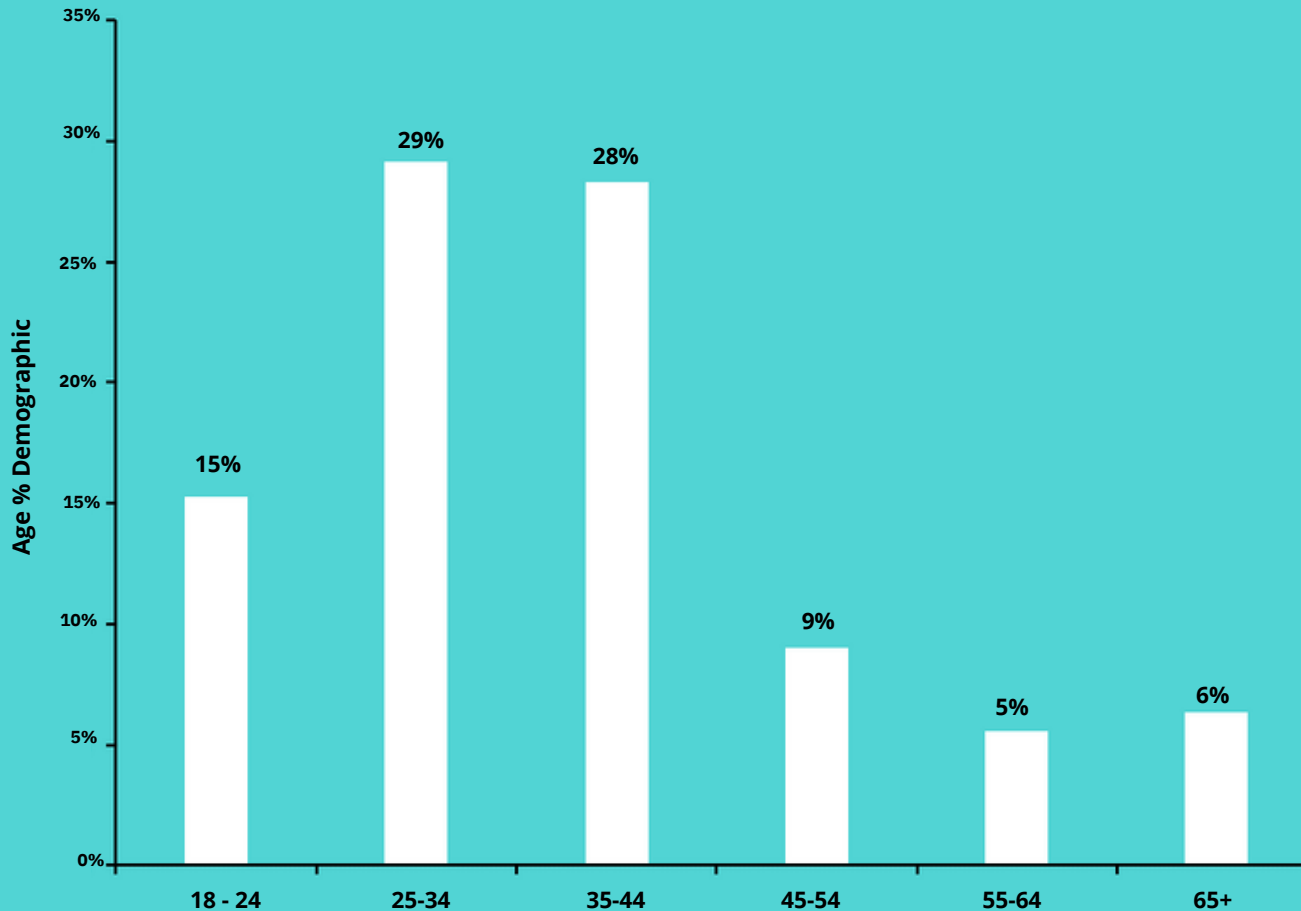
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What about Butlins?

% of Age Demographic choosing Butlins for Short Break



Source: Nielsen & Similar Web

The parks and resorts with the highest number of visits, are those that are **investing heaviest in TV**, whilst still mixing their media channels appropriately. Haven, Parkdean and Center Parcs are all using a good mix of the different channels.

The others suffer because they're investing **too little in TV**.

You may have noticed on the above graph that Butlins had a good mix of TV and Digital with some Cinema as well.

So why are they struggling to generate as many visits as the top four?

The reason is their TV strategy is struggling to generate visits and reach their targeted demographic.

Under 44 demographic not targeted effectively

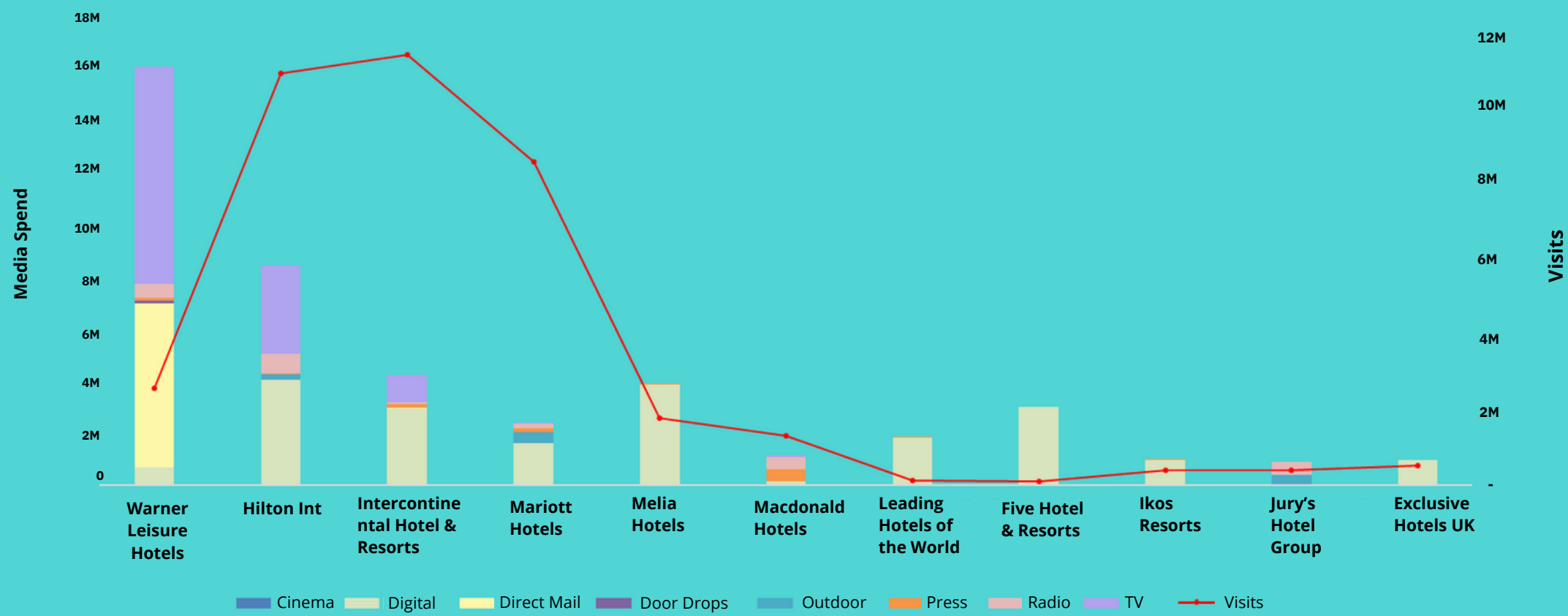
Whilst the population of over 65 appears to have been reached, the **demographic under 44 is not effectively targeted**. BaseOne+ represents ALL adults aged 18-65+. N.B everything under 120 indicates under reaching in BaseOne+Index column.

Group	BaseOne+	BaseOne+Profile	BaseOne+Index
4-15	0.00	0.00	0.00
16-24	0.60	2.30	19.50
25-34	1.70	6.90	43.70
35 -44	2.40	9.60	59.60
45-54	4.30	17.40	109.40
55-64	5.40	22.0	133.30
65+	10.30	41.90	175.30
SexM	9.90	40.40	83.0
SexF	14.70	59.60	116.20
AB	4.60	18.60	71.50
C1	6.80	27.50	89.90
C2	5.70	23.30	108.40
D	4.00	16.30	125.40
E	3.50	14.30	160.70
Total	24.60	100.00	100.00

Source: TGI

TV advertising not as effective for Warner Leisure Hotels

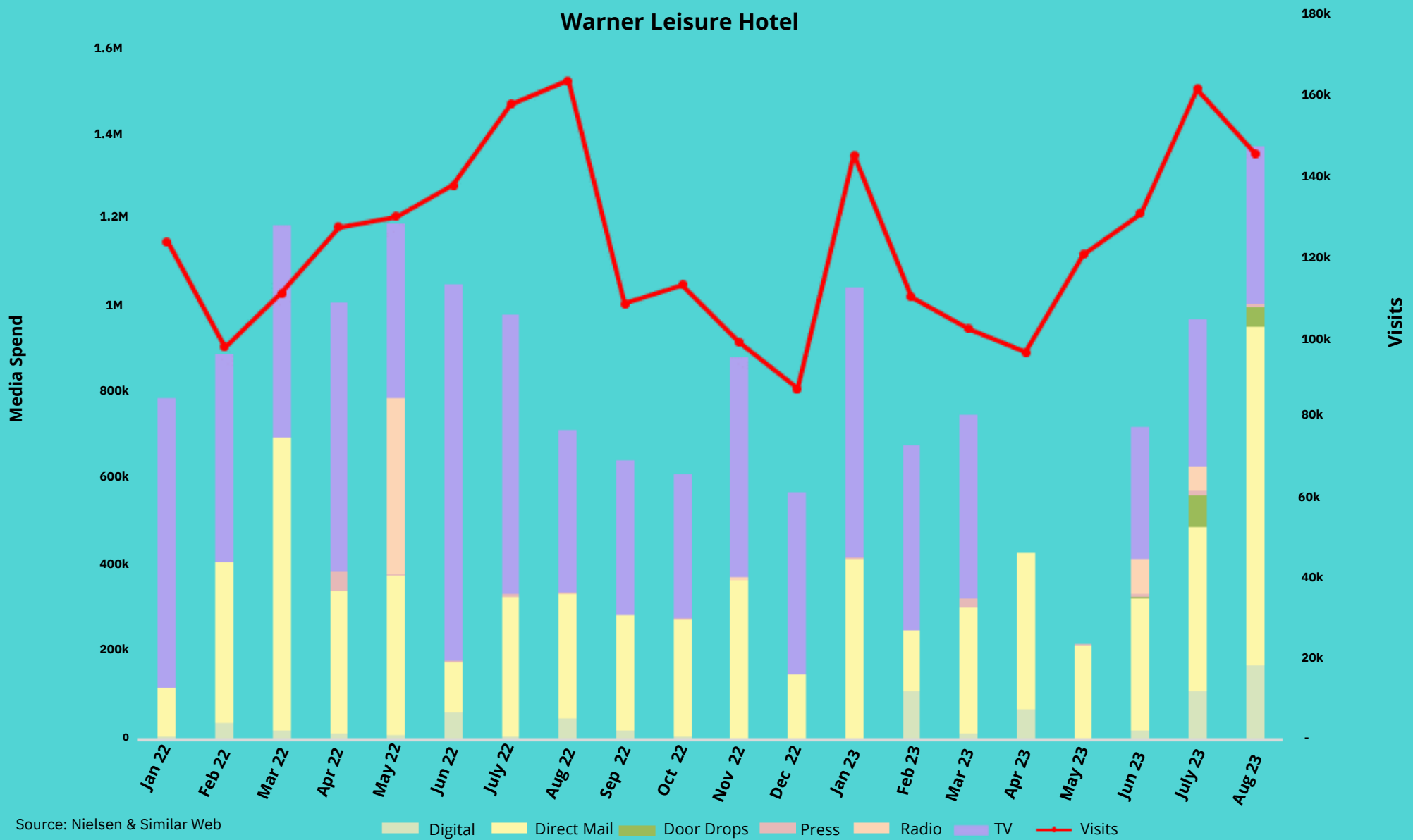
Whilst Warner is a heavy TV spender, their TV strategy doesn't seem to have the desired impact, whereas Hilton have incorporated it into their strategy and reaped the benefits. For the the other hotel groups, mostly investing in digital **is not enough**.



Source: Nielsen & Similar Web 2023

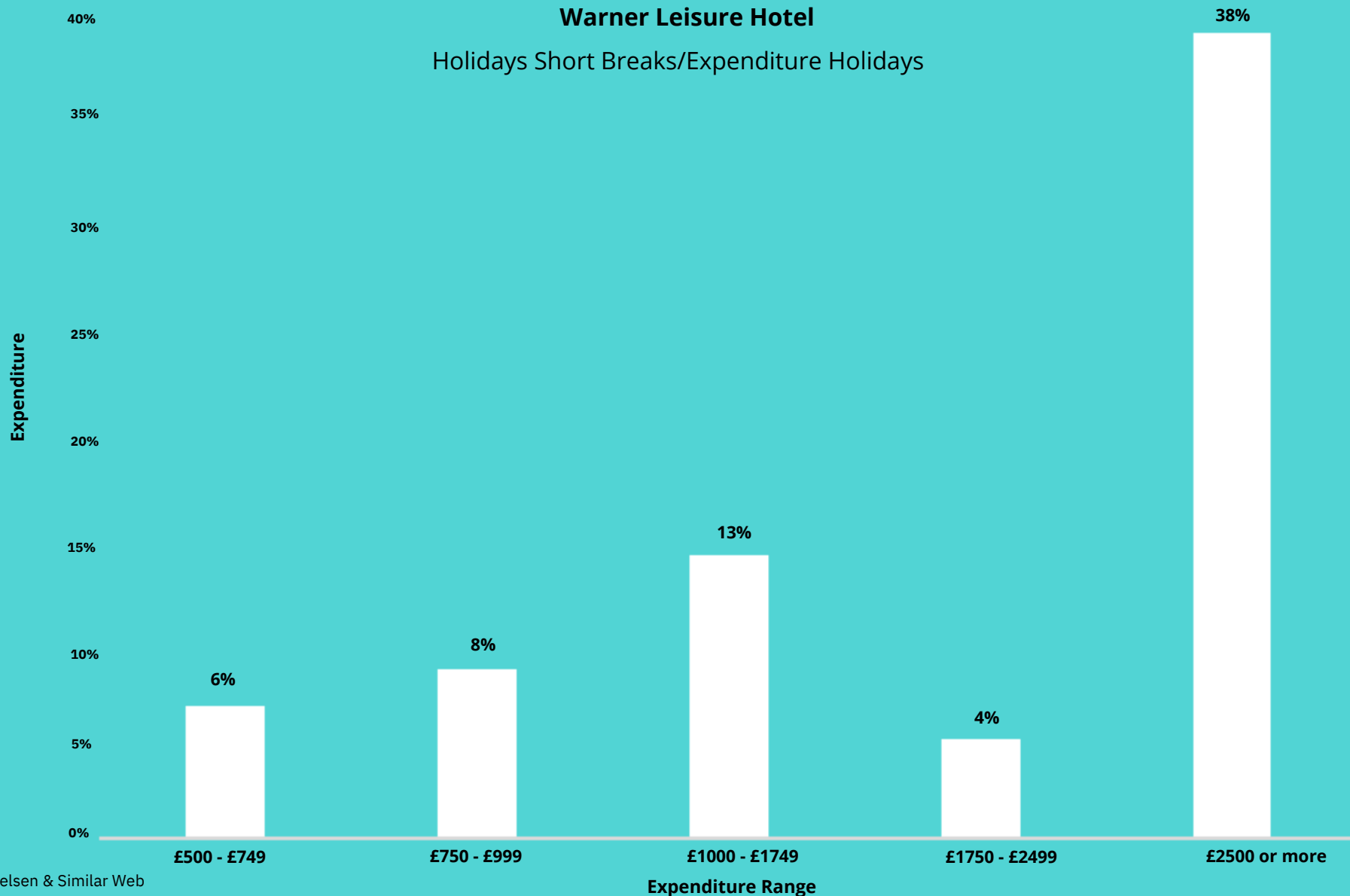
Warner Leisure Hotel's TV Investment

The brand's sub-optimal performance appears to be the result of **targeting the wrong audience list.**



Warner Leisure Hotel's TV Investment

The average Warner Leisure Hotel client spends more than £2500, which is higher than the average price that English consumers pay for a vacation or short getaway, according to a study from TGI.



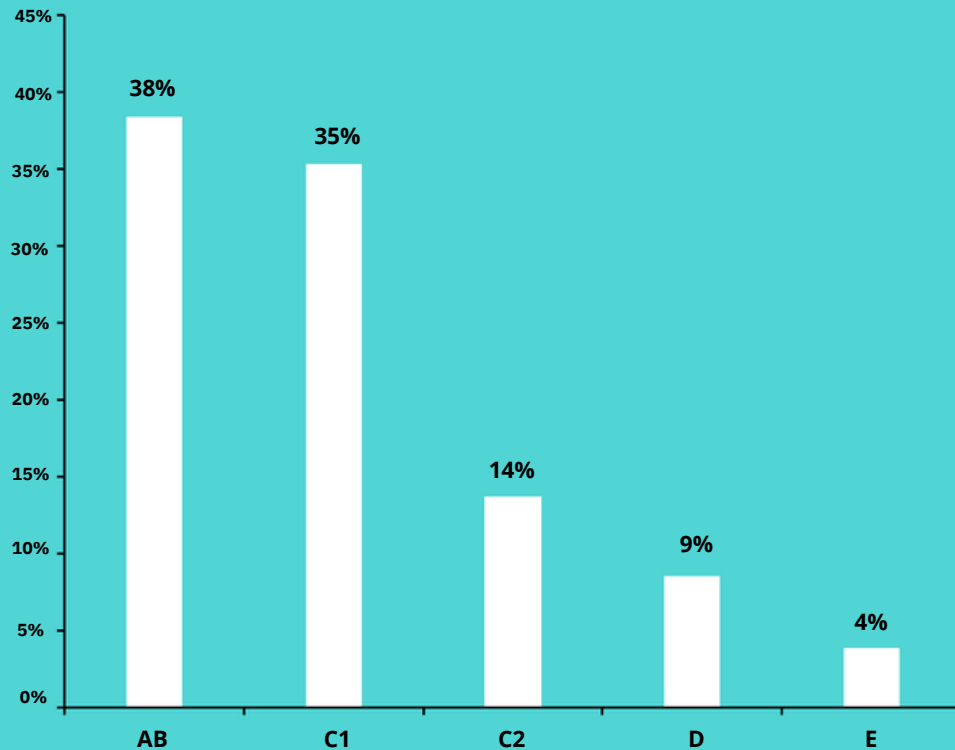
Source: Nielsen & Similar Web

Warner Leisure Hotels' clientele is wealthy

The demographic group that opted to use Warner Leisure Hotel's services is mostly wealthy.

Targeting primarily the group E is not a smart approach in light of the high level of inflation and the cost of living crisis , which is causing people to prioritise the necessities or **choose less expensive holidays**. They would be much better off targeting groups AB & C1 which are currently being under reached.

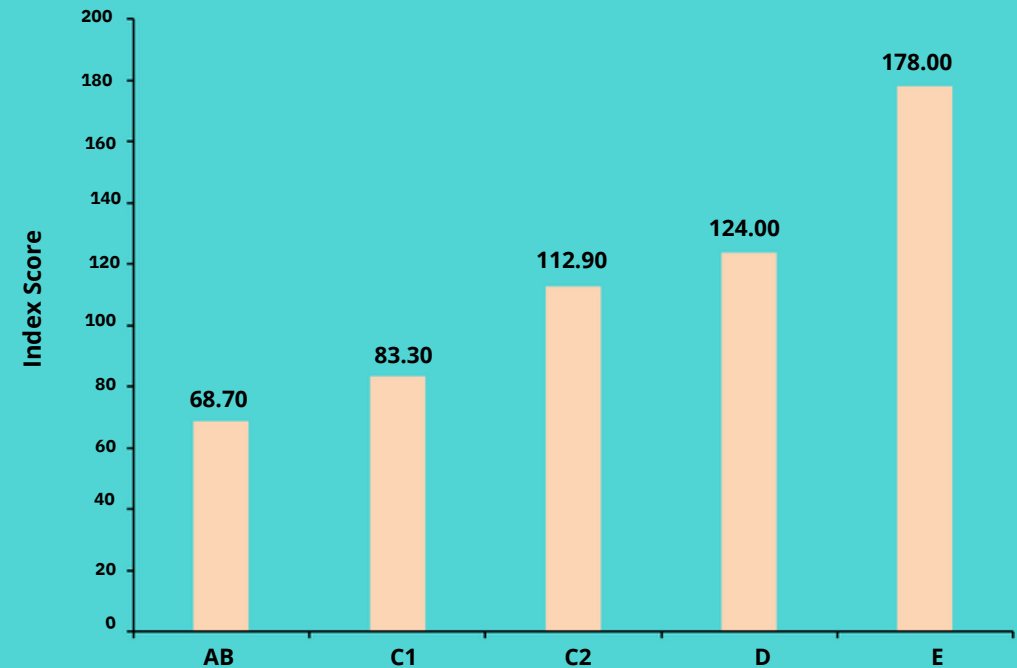
Warner Leisure by % Social Demographics



Source:TGI

Social Category Segments UK

TV Reach Base One+ Index



Source: DEN

Social Category Segments UK

"It's encouraging to see that holiday sentiment in the UK has returned to pre-pandemic norms despite the ongoing challenges we face in terms of the rising cost of living. The yearly holiday is enshrined in the British psyche as an untouchable escape for many which is quite unique when compared to other global markets where the return to travel has been much more sluggish.

It is clear in the data that linear TV has played a huge role in driving that 'return to normal' and the brands that are using it well are stealing a significant competitive advantage against their peers. Whilst the sentiment is high the need for trustworthy brands offering value for money has never been so important in a sector that has always been fiercely competitive.

Understanding the important role TV can play and how it contributes to your bottom-line is central to how we operate at All Response Media."



Liam Cronin
Board Director

Delivering your Unfair Competitive Advantage

Producing better business outcomes for the world's best brands

25+ MARKETS

120+ CLIENTS

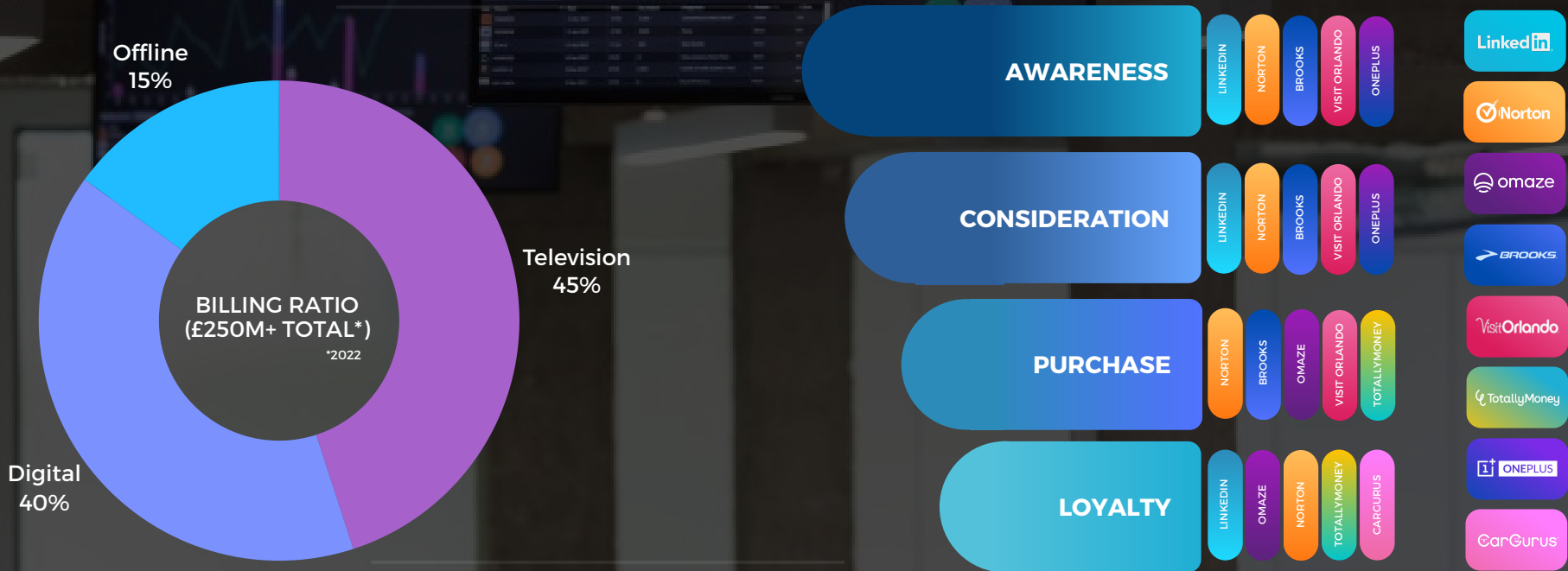
200+ SPECIALISTS

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TOP 15 UK MEDIA AGENCY

Fully integrated into your teams to deploy full-funnel media

Powered by proprietary technology, econometric models aid media leaders to develop the strategy and measure the impact on both immediate response channels, and longer-term brand metrics.



Our mission

What we do

Build businesses and brands.

How we do it

Structured to exploit gaps in imperfect data sets, giving you an

Unfair Competitive Advantage.

Why we do it

Because we are as invested as you.



LinkedIn

Darain Faraz, Head of Brand
EMEA & LATAM

"From the moment they came into pitch for our business, we knew we were onto a winner with ARM.

Their assured pitch, their confident proposal and their willingness to challenge our brief made them the obvious choice. And we were proved right – they are a savvy bunch of media buyers, who genuinely care about our brand and already feel like an extension of the team.

I have no hesitation in recommending ARM, and very much look forward to a long and fruitful working relationship with them."

Delivering the Unfair Competitive Advantage through proprietary technology

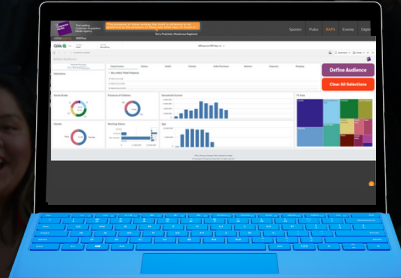
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SILVERSEA®

AllClear™
TRAVEL INSURANCE

Marriott



VisitOrlando

Danielle Hollander,
Chief Marketing Officer

"All Response Media have been strategic and thoughtful, acting as true partners in our endeavours in the UK & Ireland. Since the start of our working relationship in 2015, ARM have continued to evolve with our needs. They have been very supportive of an integrated approach, including working with airline and tour operator partners, as well as working with our publicity, social and content teams to ensure the best use of our resources to extend our reach."

To win...

...we need to **act like a start-up**

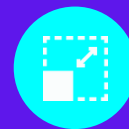
That means...



Test
small



Learn
quickly



Scale
right

