



THE SEO LANDSCAPE OF THE UK TRAVEL MARKET 2022



ABOUT CONNECTIVE3

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Founded in October 2019 by CEO Tim Grice, we've grown to a team of over 80 marketers across offices in Leeds, London and Manchester. Headquartered in the UK we work with clients globally and deliver transformational results to help them dominate in their sectors.

HERITAGE AND EXPERIENCE IN THE TRAVEL INDUSTRY



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EDITORIAL

It's well known that almost every industry across the world was affected by the impact of Covid-19 - from 2020 even until today, some industries are still struggling to recover. One of the industries whose deterioration was well-documented across the news was that of the travel industry, which many feared wouldn't recover from the tough travel restrictions imposed globally for several years.

Here at c3, we're always keen to explore and find interesting data stories, so we decided to take a closer look at the effects of the pandemic on the travel industry in this deep dive into some of the SEO data for a range of different companies. We explored the most popular facets of the travel industry, from national airline brands to staycation brands and luxury travel agents, to find which areas were most and least affected by Covid-19, and which brands are recovering the best as the world enters a new state of normal.

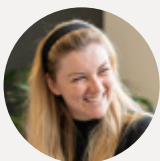
We had a look at nine categories - travel agents, national airlines, budget airlines, tour operators, coach companies, staycation brands, luxury travel agents, yacht rental companies, and online hotel booking agents - and explored the

visibility trends of the top five brands for each category. From this data, we were able to deduce which brands were hit the hardest by the pandemic, and which have shown the strongest recovery since.

We also had a look at referring domain data for each of the brands, to identify which of the brands with high visibility are being discussed by reputable sources - this gave us an idea of which brands were recovering through strong link building, technical knowledge, and organic content generation, all of which are key factors in building a strong SEO profile. Each of the brands has its own story to tell, but we were specifically looking for the most interesting stories amongst the data to report on.

"Having worked in the luxury travel industry previously, I knew that the pandemic had seriously affected much of the superyacht industry, and I was curious to see how the industry as a whole was recovering in terms of their SEO results - search volume and visibility are great indicators of how well a company or industry is performing."

CATRIONA CHERRIE, CONTENT WRITER



Catriona has been a Content Writer at connective3 for 10 months working across a range of clients. She has prior experience within the private healthcare and yachting industries working as a writer, journalist, and comms officer.

INTRODUCTION

The travel industry has seen [one of the biggest dips of almost all the industries](#) across the world over the last two years thanks to the Covid-19 pandemic. The industry took a huge hit when it was deemed that travel to other countries was effectively illegal for most people, and we all had to stay in our homes. This meant travel agencies, airlines, tour operators and even staycation brands were suddenly facing a complete drop off of their entire customer base.

The fallout from the pandemic is continuing to affect the travel industry even after the introduction of vaccines and the lifting of travel bans – [staff shortages](#) and an onslaught of eager travellers keen to jet off after two years confined to their homes have caused chaos in UK airports for the first six months of 2022. Despite this, airport groups continue to report losses as the number of passengers has yet to return to pre-pandemic levels. [Manchester Airports Group said combined losses over the last year equalled £320million.](#)

As the international market continues to struggle to cope with demand, [the UK staycation market has benefited](#) thanks to the increased demand from travellers looking to avoid the chaos. This is also in turn fuelled by the cost-of-living crisis, which is forcing many British families to reconsider expensive holidays in favour of cheaper UK summer breaks. However, the cost-of-living crisis is continuing to affect even staycation brands, with [many families holding off on holidaying at all](#) thanks to tighter budgets.

As we wait to see how the situations with the international and staycation markets play out, we have analysed the SEO trends of some of the luxury and budget travel companies that operate in the UK market to see how they have been performing over the last two years through the pandemic and into the period of recovery.

We have split the brands into nine categories:

- Travel agents
- National airlines
- Budget airlines
- Tour operators
- Coach companies
- Staycation brands
- Luxury travel agents
- Yacht rental companies
- Online hotel booking agents

Our analysis below highlights which brands are effectively ‘winning’ in their respective categories, and what some of the key learnings are that other brands can take from this. We have used [SearchMetrics](#) to understand the visibility trends of the brands we’ve analysed over the last two years to find out the percentage change in visibility to identify any anomalies.

TRAVEL AGENTS

We have analysed six of the main travel agent brands in the UK. These are:

- [Expedia](#)
- [Trailfinders](#)
- [Jet2holidays](#)
- [Virgin Holidays](#)
- [TUI UK](#)
- [Thomas Cook](#)

VISIBILITY

Travel agents	May-20	May-22	% Change
Expedia	352,400	205,700	-41.6%
Trailfinders	12,359	43,791	254.3%
Jet2holidays	94,417	110,600	17.1%
Virgin Holidays	72,017	63,975	-11.2%
TUI UK	298,800	379,600	27.0%
Thomas Cook	58,505	129,600	121.5%

The table above shows the relative visibility growth of these brands over the last couple of years from May 2020 to May 2022. It's an interesting array of results that don't provide a conclusive trend, but it does show a pattern that some travel agents were much more visible during the pandemic for a variety of reasons.

Trailfinders pulls the overall trend upwards with their huge visibility change of over 250% – the privately owned travel agent has hit the headlines many times over the last two years for various reasons, including misleading adverts and failure to provide full refunds to customers during lockdown periods. They are currently on a recruitment drive to fill vacancies in several newly acquired high street locations across England.

“Thomas Cook show a great recovery story from the pandemic.”

Thomas Cook also saw a substantial growth pattern, with an over 120% increase in visibility across the last two years, a great recovery story from the pandemic. Thomas Cook went into administration in 2019 before the pandemic and relaunched in September 2020 in the middle of the pandemic. They struggled to recover during the pandemic but appear to be coming back to a level playing field now.

Expedia's reduction in visibility of over 40% appeared to happen overnight, as can be seen in the visibility trend graph on the next page.

EXPEDIA VISIBILITY TREND



This almost overnight crash in visibility for Expedia has been a recurring trend across every industry, as Google's 2021 core update was implemented on July 1st. Rank fluctuations were tracking significantly high according to [SEMrush Sensor](#) on July 2nd, 2021, resulting in an overall volatility score of 9.4/10 across both mobile and web. The travel industry saw a volatility change of 1.9 and saw one of the highest distributions of websites drop in position after the update.

Virgin Holidays saw a large drop-off in visibility around the same time, so it could be concluded that the two drops in visibility we see in the charts indicate that the companies were mainly affected by the July 2022 core update from Google.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Expedia	12913	794	6.1
Trailfinders	3393	245	7.2
Jet2holidays	8013	224	2.8
Virgin Holidays	5016	338	6.7
TUI UK	16128	850	5.3
Thomas Cook	14156	993	7

Comparing the differences in link data can show discrepancies that we may not have otherwise seen in the visibility data, that may show which brands are being recognised most by trusted media outlets like the BBC. Jet2holidays has the lowest volume of highly rated referring domains, as well as the lowest percentage compared to the overall volume, which could mean that they are either not working too much on link-building, or that their on-site content is not as strong as the other travel agents.

Trailfinders, meanwhile, has a similar number of referring domains as Jet2holidays, but this is a much higher percentage of their overall referring domains. They also saw a huge growth in visibility, which would allude to the fact that they have improved their online content to make them more visible on SERPs and therefore more appealing for link building with authoritative domains.

BUDGET AIRLINES

We then analysed five of the main travel budget airlines in the UK. These are:

- [Ryanair](#)
- [easyJet](#)
- [Flybe](#)
- [Jet2](#)
- [Wizz Air](#)

VISIBILITY

Budget Airlines	May-20	May-22	% Change
Ryanair	54,134	64,645	19.4%
Easyjet	112,500	183,500	63.1%
Flybe	17,871	16,968	-5.1%
Jet2	94,417	110,600	17.1%
Wizz Air	10,589	18,716	76.7%

Budget airlines have shown a much more consistent pattern in comparison to travel agents in terms of upwards trajectory in the last two years since May 2020. In general, the consistent pattern is one of good growth in interest, with an average percentage growth of 34.25%, with EasyJet and Wizz Air pulling the overall percentage up with their strong growth over the last two years.

“Budget airlines have seen an online visibility upwards trajectory in the last two years”

Only one brand saw a reduction in visibility – Flybe’s visibility took a small hit of 5.1%, which seems to correlate with a small anomaly in their data around the beginning of 2022 for a month.

Jet2, Wizz Air and Ryanair all saw slight dips in their traffic around the 1st of July 2020, as is consistent with the algorithm update, we mentioned previously, but all have fully recovered and pushed higher. This may show an increased interest in budget airlines as the cost-of-living crisis hits families who still want to go on holiday but can’t afford luxury or national airlines.

EASYJET VISIBILITY TREND



EasyJet's visibility trended consistently upwards across the last two years, which follows the overall trend of all of the brands. EasyJet's visibility did not seem to be affected by the Google algorithm update as Expedia's was, highlighting that airline brands were less affected by the update than travel agents, perhaps because of the differences in on-page content between the two types.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Ryanair	50841	2731	5.4
Easyjet	43502	2191	5
Flybe	8895	636	7.2
Jet2	10105	615	6.1
Wizz Air	19910	1355	6.8

Again, we can see similar percentages of referring domains above 70 showing across the board, even with a large amount of discrepancy between overall referring domains. Ryanair and EasyJet have the highest volume of overall referring domains, with over 50,000 and 40,000 respectively.

However, their volume of referring domains over 70 remains the lowest of the group overall, meaning that their link building and on-site content are likely to be much weaker, or that they are tied to weaker domains that don't have as much authority as the likes of the BBC, Guardian etc.

Flybe paints an interesting story, as it has the highest percentage of referring domains over 70 at 7.2%, however, they were the only airline to see a drop in its visibility from May 2020 to May 2021. Despite the drop in visibility only being small at just over 5%, this implies that their strong link building is not improving their SERP rankings.

COACH COMPANIES

Next, we analysed six of the main coach companies in the UK. These are:

- [Megabus](#)
- [National Express](#)
- [Parks Motor Group](#)
- [Shearings](#)
- [Leger Travel](#)
- [Johnsons Coaches](#)

VISIBILITY

Coach Companies	May-20	May-22	% Change
Megabus	30,429	22,641	-25.6%
National Express	33,336	36,830	10.5%
Parks Motor Group	14	27	92.9%
Shearings	7,937	6,476	-18.4%
Leger Travel	1,429	2,690	88.2%
Johnsons Coaches	1,158	2,883	149.0%

An unusual combination of trends can be seen with the top coach companies in the UK – there is a definitive split between those who have lost a significant chunk of visibility (Megabus and Shearings), those who have remained fairly steady (National Express) and those whose visibility has increased significantly (Parks, Leger, and Johnsons).

Coach companies have seen waves of activity thanks to the pandemic – national lockdowns meant that travel was severely restricted, and the businesses had next to no business. When the lockdowns were lifted, and international travel was still restricted, local coach companies were able to swing back into business with coach trips and tours of local sights.

**“Thanks to the pandemic coach companies
have seen waves of activity due to lockdowns
and travel restrictions.”**

Now that we are in a post-pandemic world, we are facing a cost-of-living crisis, which is restricting people’s travel too. We are also experiencing many international travel delays and rail strikes as the fallout of the pandemic continues, putting more pressure on coach companies as the public pushes for normal life to resume.

LEGER VISIBILITY TREND



Leger Travel had an eventful two years after merging with Shearings and taking on their business. We've seen some peaks in interest in their visibility trend, but there could be some alternative reasons why this is the case. The spikes in interest that we can see in April through to September 2021 correlate with an unrelated spike in [searches for Hervé Léger dresses](#), which increased by 74% in that time frame after several red-carpet appearances.

The rescue of Shearings occurred in April 2020, and the enforcement of several lockdowns in the UK will have resulted in the plateau across 2020 into 2021. As well as this, the lifting of all restrictions on travel at the end of 2021 will have resulted in fewer staycations, showing up as a small loss in visibility on the graph.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Megabus	5497	362	6.6
National Express	13417	953	7.1
Parks Motor Group	539	47	8.7
Shearings	1187	84	7.1
Leger Travel	1159	58	5.0
Johnsons Coaches	749	60	8.0

The link data for coach companies echoes the data we've seen previously, in that the average percentage of referring domains remains below 10%. However, this is the broadest range we've seen so far, from 5% to 8.7%. Johnson's Coaches appear to be doing the best of the group of brands, with over 140% growth in visibility, and one of the highest percentages of highly rated domains.

Meanwhile, Megabus has one of the weakest referring domain percentages, and also suffered the biggest fall in visibility from May 2020 to May 2022 – this could be in part due to decreased demand during the pandemic, however, when compared to the other brands in the same arena, it's clear that demand was still present, so there could be further issues here with SERP rankings and their on-site SEO that could need addressing if they are to find themselves ranking positively again. Improving their SEO would also improve their referring domain percentage, as more reputable domains would look to build links with them.

NATIONAL AIRLINES

Next, we had a look at the top six national airlines that operate in the UK:

- [British Airways](#)
- [Virgin Atlantic](#)
- [Emirates](#)
- [Qatar Airways](#)
- [Lufthansa](#)
- [KLM](#)

VISIBILITY

National Airlines	May-20	May-22	% Change
British Airways	111,000	155,900	40.5%
Virgin Atlantic	11,384	35,275	209.9%
Emirates	22,027	25,676	16.6%
Qatar Airways	4,523	6,824	50.9%
Lufthansa	7,168	9,314	29.9%
KLM	34	11,214	32882.4%

It's no surprise that the bigger national airlines have seen an overwhelming growth in visibility across the period of the pandemic – when the national lockdowns first came into effect, international and national travel was practically non-existent, and searches for flights will have hit an all-time low. In the three months to the end of June, [British Airways alone lost more than £700m](#).

This resulted in several airlines letting go of their staff, the most dramatic of which was [British Airways axing over 10,000 staff members](#) and offering steep pay cuts to the staff that were retained. This has resulted in [prolonged industrial action by airline unions](#) which has affected numerous flights across the UK ever since. This may explain why their search volume was extraordinarily high during the pandemic when searches for flights were at an all-time low.

“When the national lockdowns first came into effect, travel was practically non-existent, and searches for flights hit an all-time low.”

When the borders were hesitantly opened up in between lockdowns, searches for international and domestic flights slowly began to gather pace. When the final travel and social distancing restrictions were lifted at the beginning of July 2021, [national airlines were overwhelmed](#) with customers booking international and domestic flights.

With the combination of staff on sick leave with Covid, staff redundancies, and union strikes, thousands of flights have been affected, delayed, and cancelled. This will also have affected search volume as customers search for their flights to check on their status due to the instability at all British airports.

KLM's intense growth of 32882.4% in visibility can be seen to happen in a huge spike in searches around October/November of 2021. Prior to this, searches for KLM were extraordinarily low considering they are one of the leading airlines in the industry – this could be explained by poor SEO management pre-pandemic.

VIRGIN ATLANTIC VISIBILITY TREND



Virgin Atlantic's growth of over 200% shows the clearest pattern of events throughout the pandemic, with lower search volume in 2020, a spike of interest around Christmas and New Year when travel restrictions were briefly lifted, and an increased surge in interest when restrictions began to lift, and the government's plan for lifting all restrictions was released, meaning customers could begin to plan ahead.

“Virgin Atlantic's growth of over 200% shows the clearest pattern of events throughout the pandemic, with peaks of interest in line with travel restrictions lifting.”

The large spike in December 2020 also correlates with the Google algorithm update coming into effect – this could have resulted in a sudden surge in visibility if their SEO setup was favoured by the rules implemented by Google. The brand seemed unaffected by the later updates in June and July 2021, and the spike also fell back to previous rates by February 2021, perhaps implying the spike was caused by a spike in genuine interest.

Another big jump around February/March of 2022 correlates with the increase in flight delays and strikes, as Covid continued to spread across Europe, and people were beginning to receive their first vaccines, increasing the expectancy that international and domestic travel could be back on the cards shortly.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
British Airways	50005	3212	6.4
Virgin Atlantic	6940	672	9.7
Emirates	40320	2735	6.8
Qatar Airways	31761	1981	6.2
Lufthansa	44423	2801	6.3
KLM	2189	212	9.7

The most resounding analysis of the link data here is that even though some of these brands have incredibly high numbers of referring domains, their quality is poorer, which means that they are not as valuable. While Virgin Atlantic and KLM have much fewer referring domains, their quality is much higher. However, their volume of referring domains is considerably lower than the others, which could mean that although they have a higher percentage of valuable referring domains, this is only in comparison to the much lower overall volume.

Good quality referring domains, paired with a high volume of overall referring domains paint a much better picture of the site's SEO and SERP value, so, likely, these brands are all on a level playing field.

However, we may be able to dismiss this outcome when we see that both KLM and Virgin Atlantic saw stratospheric growth in visibility from May 2020 to May 2022, which would mean that their lower volume of referring domains, but the high percentage of good-quality domains means that they have really strong SEO and are ranking much higher in SERPs because of this.

TOUR OPERATORS

When it came to tour operators based in the UK, we analysed the top four:

- [Contiki](#)
- [Rabbie's Tours](#)
- [GAdventures](#)
- [Intrepid](#)

VISIBILITY

Tour Operators	May-20	May-22	% Change
Contiki	727	962	32.3%
Rabbie's Tours	528	436	-17.4%
GAdventures	243	4,311	1674.1%
Intrepid	5,653	11,349	100.8%

There's a real variety again in the trends we see amongst the top four tour operators in the UK, a fairly consistent trend amongst all of the sectors that come under the travel industry umbrella. Once again, the pandemic has had a strong impact on this sector, with major losses during the significant lockdown periods and strong uptake during respite periods.

Similar to coach companies, we saw larger spikes in the middle of 2021 when domestic travel was permitted, and a stronger upward trend toward the current day as normal life resumes, but international travel continues to struggle to operate at its typical capacity.

Rabbie's Tours is the only brand to have suffered a negative trend in visibility, with a decrease of over 15% – as of May 2022, they were receiving a similar number of searches as they were during the initial lockdown period – this could be due to less interest now that international travel is open again and Brits look to head abroad after two years with no overseas holidays.

It may also correlate with the fact that when domestic travel was popular, during the middle of the pandemic, the market was much busier, and therefore Rabbie's Tours was receiving more searches than it would normally receive anyway. This would mean that the decrease we see is a return to normal visibility stats for them. However, as this trend doesn't match with the other three, it's always wise to assume that there could be SEO issues at play.

GADVENTURES VISIBILITY TREND



GAdventures has had the biggest uptick in visibility with over 1600% positive change since May 2020. As of around March 2021, the visibility of their site shot through the roof, as international travel was due to come back onto the cards by the summer. The brand also began to offer a much broader range of package deals, phone, and video consultations for their clients, and ultimately, pent-up demand from consumers.

GAdventures have also capitalised on this demand by cashing in on strong marketing opportunities, pushing its brand image further into the public eye. Teaming up with the likes of Hostelworld to create advertising that appeals to a broad variety of consumers, their key demographic of which appears to be 18–30-year-olds who may have missed out on significant life events thanks to the lockdowns and are looking for some escapism.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Contiki	10102	612	6.1
Rabbie's Tours	3555	147	4.1
GAdventures	8435	797	9.4
Intrepid	25481	1050	4.1

As we saw above, GAdventures had a massive growth from May 2020 to May 2022, and this is matched by their high percentage of high-quality referring domains. Their marketing work on improving their website, big ad campaigns and teaming up with other reputable brands have secured them several strong domain references and link work.

This stands in strong contrast to the journey that Rabbie's Tours have undergone in the same period. Their referring domain percentage is much lower, as well as their overall number of referring domains, which most likely means that their PR efforts have been poor, and the links that they have gained have not been reputable enough to boost their visibility, meaning they rank lower in SERPs over this period. Some strong SEO and PR work would be conducive to improving both of these stats.

YACHT RENTAL COMPANIES

As an industry, yacht rentals are more niche than some of the larger branches of the travel industry like national airlines, but it was still intriguing to see the SEO impact on this sector. We had a look at the top five brands in this sector:

- [Princess Yacht Charter](#)
- [Borrowaboat](#)
- [Sunsail](#)
- [Dream Yacht Charter](#)
- [Adventure Connections](#)

VISIBILITY

Yacht Charter	May-20	May-22	% Change
Princess Yacht Charter	12	61	408.3%
Borrowaboat	3	93	3000%
Sunsail	687	620	-9.8%
Dream Yacht Charter	112	109	-2.7%
Adventure Connections	1,648	1,612	-2.2%

The yacht rental industry normally operates with smaller than average visibility scores, as it's an exclusive and very expensive mode of travel. The pandemic resulted in a degree of income inequality – those who were in privileged positions were able to work from home, had more disposable income, and benefitted from the income inequality that came about from both the pandemic and the cost-of-living crisis. This meant that those few who could afford yacht charters pre-pandemic were at an advantage compared to those who would be booking budget airline holiday packages, for example.

Interestingly, the yacht charter industry again contained a multitude of visibility scores that ranged from nearly 10% loss to over 3000% gain. While Borrowaboat's 3000% increase in visibility looks incredibly positive, it is worth noting that its search volume is still lower than other brands we've identified.

The brands with historically higher search volume have seen small losses in visibility since the beginning of the pandemic, with differing trends between them. Both Adventure Connections and Sunsail saw huge peaks in the early part of 2021, when travel was still predominantly restricted and travelling in groups was banned in most countries.

However, yacht charter was considered one of the most socially distanced modes of travel, and therefore also one of the safest holidays that could still be undertaken without the risk of catching Covid. Across the board, the yacht charter sector appears to be one of the sectors that have remained in the neutral zone throughout Covid, with only a minor impact at the beginning and a strong return to usual practice.

SUNSAIL VISIBILITY TREND



Sunsail was one of the groups to see a decrease in their visibility from May 2020 to May 2022 – it was also one of the few groups to see spikes in activity throughout the pandemic, as opposed to a low period followed by an increase. This doesn't follow the typical trends we've seen for other sectors and could be explained by the fact that this sector is particularly niche and caters nearly exclusively to high-net-worth individuals, whose incomes have not been affected by the pandemic or the cost-of-living crisis.

However, the dip from October 2021 to now doesn't appear to follow the trend of positive gain as shown by other industries, and even by other brands in this sector – it could be that SunSail as a brand is struggling to retain its audience as other charter businesses snap up their client base with more elusive offerings and choices of charter destinations.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Princess Yacht Charter	203	12	5.9
Borrowaboat	889	105	11.8
Sunsail	854	72	8.4
Dream Yacht Charter	2430	97	4.0
Adventure Connections	504	15	3.0

Yacht charter sites have some of the lowest overall volumes of referring domains, which is unsurprising as we analysed that this is more of a niche market that doesn't appeal to the largest volume of people. This also could have an impact on the referring domains that these brands are affiliated with, as more niche markets may not be valued as highly as domains that acquire more readership, so this is worth bearing in mind when looking at this data.

Borrowaboat has the highest percentage of valuable referring domains and also one of the largest growth periods of all the brands in this whitepaper at 3000% - this astronomical growth matched with the very high percentage of valuable referring domains is likely to mean that their SERP rankings are very high and have been pushed higher with strong SEO work on their site.

There is also positive news for Sunsail, as although their visibility is currently lower than it was in May 2020, they have a high percentage of referring domains compared to their competitors, which means that with some strong onsite content and good PR work, they could overtake their competitors and see great growth in future.

LUXURY TRAVEL AGENTS

We also analysed five of the top luxury travel agent brands in the UK to compare with the budget travel agents that are also operating in Britain. These include:

- [Kuoni](#)
- [Abercrombie and Kent](#)
- [Audley Travel](#)
- [Sovereign](#)
- [Secret Escape](#)

VISIBILITY

Luxury Travel Agents/Tour Operators	May-20	May-22	% Change
Kuoni	31,670	27,465	-13.3%
Abercrombie and Kent	1,601	5,855	265.7%
Audley Travel	6,599	19,805	200%
Sovereign	7,352	9,105	23.8%
Secret Escapes	17,354	10,006	-42.3%

Similar to the yacht industry, this sector of the travel industry umbrella has appeared to flourish post-pandemic with the influx of travellers, particularly those of the high-income bracket who can afford luxury travel agents and tours. It's also possible that after the pandemic and several lockdowns, many Brits felt inspired to take once-in-a-lifetime trips, as the threat of further lockdowns, pandemics and economic collapse became a real fear for the future.

“We can see that several luxury travel agents and tour operators brands have experienced great growth since the beginning of the pandemic.”

Luxury travel agents were also offering attractive deals to customers in a bid to gain traction on the business they had lost during the lockdown, so we can see that several of the brands have had great growth since the beginning of the pandemic, as travel and borders opened up. Abercrombie and Kent and Audley Travel both follow similar growth patterns of slow growth during 2020 and 2021, and larger spikes in 2022 as all restrictions in the UK and most of Europe opened up again.

Sovereign has also experienced growth, although theirs appears to come in much larger peaks and troughs than the previous two brands. Their biggest growth spurt occurred from April to May 2022, which did coincide with the Platinum Jubilee of the Queen of Great Britain which occurred in June 2022. It may be that this correlated with many people taking the opportunity to find luxury getaways both at home and abroad. It could also be that many googling 'sovereign' expecting results on Queen Elizabeth, instead came across the luxury travel brand!

Secret Escapes took one of the biggest losses in visibility during this period, a lot of which we are attributing to the Google core algorithm updates that occurred during this timeframe.

SECRET ESCAPES VISIBILITY TREND



Following a trend that we see similarly with hotel booking sites, certain sites did not recover well from the core algorithm updates implemented by Google in December 2020 and July 2021 – Secret Escapes was one such site that has seen visibility fall drastically, by over 40%. They were already experiencing a downward trend at the beginning of the pandemic thanks to the lockdowns in place, but this trend only continued after a sharp drop in December 2021, which coincided with the first update.

**“Secret Escapes has seen a visibility fall
by over 40%”**

They appeared to be making a recovery in June 2021, perhaps due in part to the first part of the algorithm update that was implemented, but part two of the update in July 2021 knocked their visibility back down again. Since the beginning of 2022, they appear to be making some progress in pulling themselves back up the SERP rankings to improve their visibility, but they still fall a way behind other brands in the same sector who were not as badly affected by the algorithm updates.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	% Change Referring Domains over DR 70
Kuoni	4932	293	5.9
Abercrombie and Kent	2480	184	7.4
Audley Travel	4583	341	7.4
Sovereign	1376	88	6.4
Secret Escapes	2779	286	10.3

Comparing the link data, the luxury travel companies bring up some interesting analyses. This group have very similar numbers when it comes to referring domains, meaning that they're predominantly working on a level playing field. As with luxury yacht charter, this sector appeals to a more niche group of individuals who can afford these types of travel, which also explains why their numbers are lower than those of the standard travel agents.

Again, we see an interesting opportunity waiting for Secret Escapes to take – their visibility took a large hit from May 2020 to May 2022, despite the growth in staycations and holidays in the UK. However, their percentage of valuable referring domains is the highest of their sector. This means that they're sitting on untapped potential in terms of pushing themselves back up the visibility chart by utilising strong content and PR strategies.

Meanwhile, the likes of Kuoni have much more work ahead of them to be on par with their competitors – they are failing to reach both positive visibility scores and rank with high-valued referring domains, so a much more in-depth review of their marketing and SEO would be needed. Of all of the groups, Audley Travel and Abercrombie and Kent are proving to have the best of luck in both categories, meaning their marketing and SEO strategies for the duration of the pandemic have worked in their favour and have found their way to their key audiences.

ONLINE HOTEL BOOKING

We have analysed five of the main travel agent brands in the UK. These are:

- [Booking.com](#)
- [Trivago](#)
- [Airbnb](#)
- [Lastminute.com](#)
- [Hotels.com](#)

VISIBILITY

Hotel Booking	2020	2022	% Change
Booking.com	475,900	434,500	-8.7%
Trivago	185,700	88,997	-52.1%
Airbnb	21,829	27,017	23.8%
Lastminute.com	293,300	254,600	-13.2%
Hotels.com	119,600	196,300	64.1%

Hotel booking sites, alongside yacht charter brands, appear to have a mix of ups and downs reported for visibility across 2020 to 2022, although no strong outliers, which would suggest a strong trend of either small growth or small decline. The hotel business, similar to every travel sector, was hit by the pandemic in unique and unparalleled ways.

However, the biggest way in which hotel booking sites were affected visibility-wise was the implementation of the Google core algorithm updates in December and July. Trivago and Airbnb were two of the worst hit by these updates – Airbnb has since adapted their on-site SEO to deal with the repercussions of the update, while Trivago doesn't seem to have recovered at all, resulting in their 50% drop in visibility, which first kicked in in December 2020 and took a further tumble in July 2021.

“The Google core algorithm updates in December 2020 and July 2021 affected SEO visibility for hotel booking sites.”

Hotel booking sites, along with travel agents, both standard and luxury, appear to have suffered the most from poorer visibility since the pandemic, while other groups have seen explosive growth, like budget and national airlines. These industries, however, have experienced less controversy across this period, meaning that fewer people were interested in searching for hotels anyway, while airlines were getting a lot of negative exposure for their treatment and dismissal of thousands of staff, as well as the current troubles with the industry.

HOTELS.COM VISIBILITY TREND



Hotels.com had one of the most interesting trends in visibility across the pandemic, with a large dip that lasted from December 2020 to July 2021, when the Google core update occurred. This could imply that the algorithm update helped to boost Hotels.com when it was struggling to appear in the SERPs.

The steep decline at the end of 2020 correlates with the reintroduction of stricter lockdown measures post-Christmas when coronavirus rates in the UK were at an all-time high. We can see this trend across all five of the hotel-booking brands around the same time, indicating that it was a sector-wide issue.

However, the drop does also occur at the same time as the December core update by Google, indicating that there may have been a slight shift in how Google was presenting SERPs, and therefore Hotels.com wasn't ranking as highly as it normally would have, which was rectified by the July core update.

As it is one of the few hotel brands to have recovered from the pandemic, it can be assumed that the drop was SEO related as opposed to brand or business-related.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Booking.com	276793	7123	2.6
Trivago	3722	274	7.4
Airbnb	31280	2077	6.6
Lastminute.com	17987	1130	6.3
Hotels.com	12226	769	6.3

Contrary to the previous sector, the online hotel booking sector has a huge variety of data when it comes to referring domains and link data. The starkest contrast is between Trivago and Booking.com – one has nearly 3000,000 referring domains, whilst the other has just over 3,000. This is a huge chasm and should be taken into consideration when we analyse the differences between their referring domains.

Booking.com's 276,000 referring domains have quite a low percentage of strong referring domains over 70, however, they do still have over 7,000 of them in comparison to the next highest volume of 2,077 from Airbnb. Booking.com's visibility also took a hit during the pandemic, which could be a lot to do with having such a low percentage of reputable link data – this would affect their positions in the SERPs, and this would impact their visibility.

Meanwhile, Trivago had the highest link data percentage, and yet they suffered worst from having low visibility. However, this could be in part because they fall far behind their competitors when it comes to link building and referring domains. An improvement in PR strategy, as well as stronger content marketing, would help to push these numbers up, thus improving their visibility on SERPs.

Interestingly, Hotels.com and Lastminute.com have the same percentage of high-value link data, however, Hotels.com saw a 60% increase in visibility while Lastminute.com's visibility tanked by nearly 20% – this could be indicative of strong marketing campaigns from both, but Lastminute.com fails to match this with strong SEO and content on-site, which would keep lower down the SERPs. An in-depth review of their SEO strategy could reveal any shortcomings that could improve their visibility to be on par with their competitors.

STAYCATION BRANDS

Analysis of the four top staycation brands in the UK has also brought up interesting SEO analysis:

- [Haven](#)
- [Center Parcs](#)
- [Butlins](#)
- [Park Holidays](#)

VISIBILITY

Staycation brands	May-20	May-22	% Change
Haven	16,874	26,783	59%
Center Parcs	12,416	17,336	40%
Butlins	7,865	11,476	46%
Park Holidays	4,507	5,020	11%

Staycation brands were one of the lucky sectors during the pandemic, as they saw a huge spike in interest when international travel was still restricted to essential travel only. When the lockdowns were lifted and social distancing rules relaxed, many took the opportunity to travel around the UK and book holiday cottages, caravans, and camping sites to escape their homes and have some well-earned relaxation time away from their homes.

“Staycation brands saw a huge spike in interest when international travel was restricted during the pandemic.”

This shows true in all of the visibility data we see for the staycation brands we analysed, as they all showed strong increases in visibility from the beginning of the pandemic even to the present day. Despite the reintroduction of international travel, domestic travel is still at an all-time high as many shun the stress of cancelled and delayed flights and long queues at the Border thanks to the removal of Britain from the EU.

“Many families are opting for holidays in the UK instead of expensive holidays abroad.”

Staycation brands are also benefitting and losing out because of the cost-of-living crisis – many families are shunning expensive holidays abroad and opting instead to holiday in the UK, particularly luxury holiday cottages and hotels. However, as the cost-of-living crisis affects lower earners more acutely than high earners, the brands such as Butlins and Haven may see dips in popularity as many choose to remain at home this year to save money.

CENTER PARCS VISIBILITY TREND



Centre Parcs saw several spikes in visibility over the last two years, with a large spike from December 2020 to February 2021. At this time, the nation went into another full lockdown on the 6th of January, so it's safe to assume that this spike in searches correlates more with the Google algorithm update in December than it does with organic searches increasing.

However, the slow growth across the rest of the year is a good indication of the increasing lessening of restrictions on travel and meeting in larger groups. As Center Parcs is a renowned British holiday destination business, it's likely that when stay-at-home vacations were allowed before international holidays, they were one of the first brands that come to mind for many who needed a long-earned break, resulting in growing searches.

LINK DATA

Brand	Referring Domains	Referring Domains over DR 70	Referring Domains over DR 70 (%)
Haven	2882	175	6.1
Center Parcs	3231	213	6.6
Butlins	2472	229	9.3
Park Holidays	1891	94	5%

Staycation brands were one of the few groups that only saw improvements in visibility from May 2020 to May 2022 during the pandemic. All four brands also have strong percentages of high value referring domains, which could be in part due to the influx of Brits choosing to holiday at home rather than venture abroad while travel strikes, delays and passport queues are causing an unpleasant experience.

Butlins has the highest percentage of referring domains thanks to strong marketing campaigns that appeal to all families and even groups of adults. By appealing to such a broad market, they can improve their visibility amongst a massive audience, and this will have helped their visibility trends and link data massively.

TAKEAWAYS

The general trend we can follow across all of this data and these sectors of the travel industry is that the industry as a whole was greatly affected at the beginning of the pandemic, with consistently low search rates and visibility as travel became redundant in the lives of most Britons.

As each lockdown came into effect, search trends for the most part dived, apart from those for airlines. People were likely looking for information on refunds for cancelled flights and holidays. At the end of each lockdown, we saw optimism from the public as search trends began to tick back up across hotel brands, airlines, and travel agents.

We also saw the impact of the implementation of several core Google algorithm updates that either gave brands a boost above their competitors or completely killed their presence on SERPs – these updates are always volatile in their impact, and it can't always be predicted whether the update will affect you or not, so those who were affected negatively had no choice but to find ways to recover, some of which did and some which did not.

The most consistent trend we can see across time is that most brands are recovering their visibility, and particularly the staycation sector is currently booming and looks likely to continue to grow as reluctance to travel and the impact of Covid-19 continues to affect international travel.

However, there are still anomalies that have an unpredictable future, mostly national airlines. These brands have been the most badly affected by the pandemic, with staff shortages due to illness and Covid-19 isolation, firing and hiring of thousands of staff, and union strikes due to poor treatment of workers during the pandemic. It's likely that the airline brands cover could take any length of time as they navigate these issues and try to return to a state where they can operate at full capacity.

In the meantime, staycation brands and UK-based hotels and travel companies will likely see consistently strong data as they remain the more reliable option for both the British public and tourists alike. These brands are finding new ways to make themselves more appealing to customers and including new tours, new holiday packages and even new environmental policies, are attracting more and more Brits to holiday at home, which is a positive sign for their future SEO rankings.

Of the link data that we analysed, it's clear to see which brands need to improve their SEO and PR opportunities and on-site content to begin catching up with their competitors. It was also clear to see which brands were not applying the correct SEO strategy in their link acquisition, as some brands had staggeringly high volumes of referring domains, but very poor visibility.

Several brands could do with an in-depth analysis of their current performance and where they rank in comparison to their competitors to gain a better understanding of where their strategy needs to improve, all of which c3 can provide with our [SEO, content strategy](#), and [digital PR](#) services. We also have a dedicated data team who can analyse your performance and give you highly detailed recommendations for future growth.

If you'd like any further information on the data presented above or would like to know more about the services that we provide, feel free to [reach out](#) to us directly.

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