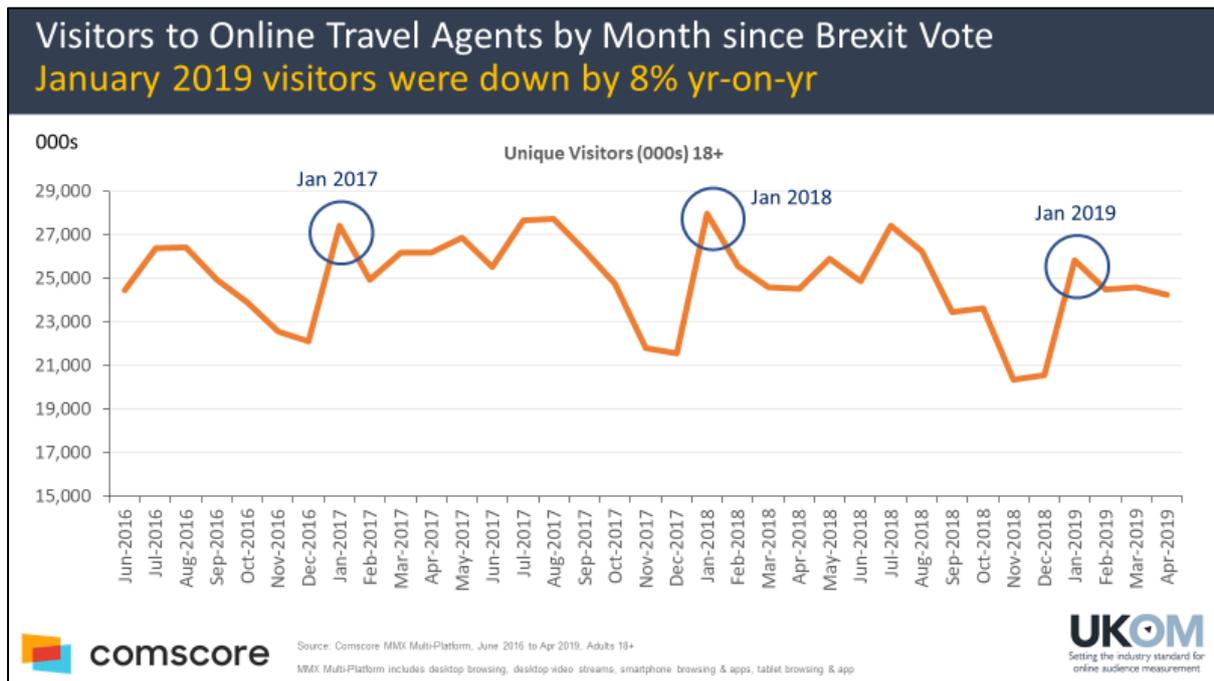


# UKOM Insights

## Online Travel Agents

Last month Thomas Cook announced a pre-tax loss of £1.5 billion for the half year ending March 2019, blaming uncertainty around Brexit which is said to be delaying customers’ booking of holidays abroad. TUI also announced that bookings were down year on year. Given the volume of holidays which are now booked online, this month UKOM looks at online travel agents to explore if category visitors are down year-on-year and who are the biggest winners and losers.

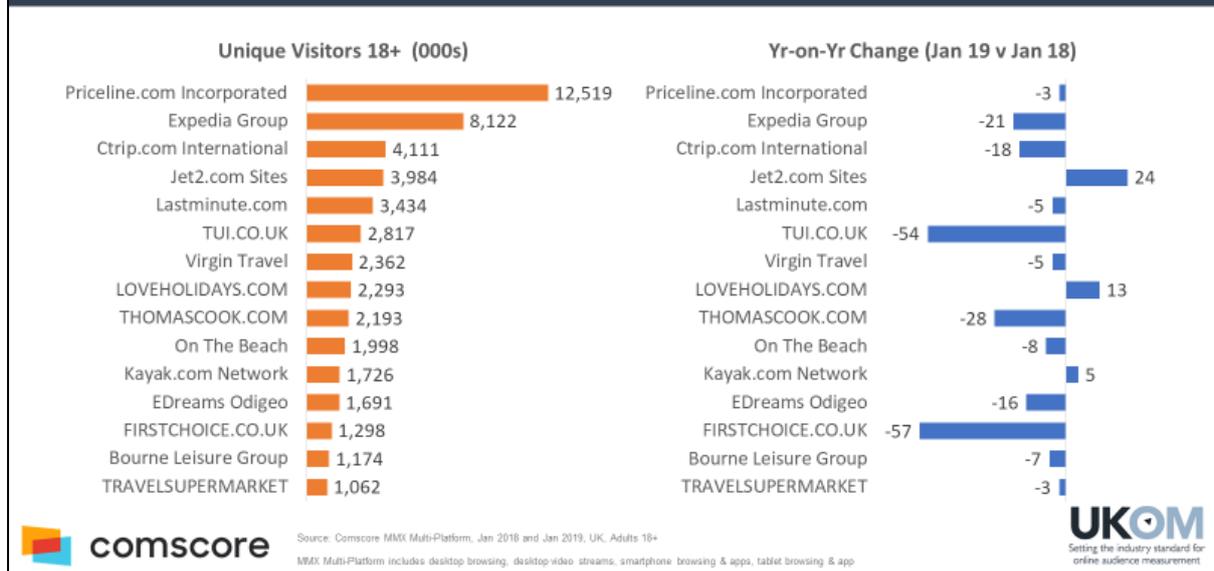
January is usually a bumper month for visitors to travel websites as it’s the time that many people begin thinking about their summer holiday plans. The chart below shows visitors to the online travel agent category by month since the Brexit vote month and clearly demonstrates that interest rockets at the start of the year. In both 2017 and 2018 over 27 million adults visited online travel agents in January – two thirds of the UK online population - but this year visitor numbers were down by over 8%, a decline of over 2 million.



When looking at the main players within the category, there are clear winners and losers. The chart below shows that visitors were down for 12 of the top 15 online travel agents as categorised by Comscore. The traditional package holiday companies – Thomas Cook, First Choice and TUI all experienced the biggest drops compared to January 2018. Only Jet2, loveholidays and Kayak witnessed yr-on-yr growth.

## Visitors to Online Travel Agents Category in January 2019

### First Choice, TUI and Thomas Cook experienced biggest y-o-y decreases



Although the latest results from Thomas Cook and the data above suggests holidaymakers have not been in a rush to book their summer trip early, the yr-on-yr decline has not been so evident in last 2 months. In March and April, yr-on-yr visitor numbers to Online Travel Agents were flat whilst TUI even saw a 5% yr-on-yr uplift in visitor numbers for April. Whilst it is true that visitor data does not imply sales, it may provide an indication that consumers are leaving it later before booking their summer holiday abroad this year rather than abandoning them altogether. The uncertainty over Brexit doesn't look to be over anytime soon, so it will be interesting to monitor visitor numbers over the next couple of months. Are consumers choosing a staycation this summer or will the online travel agents see a spike in last minute bookings? It seems no-one can predict the future especially right now, but UKOM approved Comscore data can provide valuable category and competitor insight which could give early indicators of consumer trends.

#### Notes on Data:

All data is based on UKOM industry standard and development level approved Comscore MMX Multi-Platform data based on 2018 and 2019 data. All UK data is based on UKOM industry standard approved Comscore MMX Multi-Platform data across Desktop PCs (including laptops and notebooks) and Mobile devices (smartphones and tablets).

Comscore content category selected is 'Travel - Online Travel Agents'. Analysis is carried out on 18+ online users.