

Digital Destinations

How the web is shaping today's holiday
experience for Irish consumers



Welcome aboard



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In Ireland, people across all age groups regularly use the internet. Usage of digital platforms and services is well established, and there is also a high take up of smartphones and tablets, though PCs and laptops still take up a greater share of device time.

Despite being the leading channel used across the customer travel journey, the online experience can also be fragmented, time consuming and not always intuitive.

Digital technologies provide an excellent opportunity to create a 'connected' travel experience from providing inspiration at the research and planning stage, through to sharing memories with others when back from holiday.

Understanding how customer attitudes to travel and digital differ allows travel brands to improve targeting and personalisation. They can also improve the customer experience by providing appropriate tools at relevant touchpoints across different stages of the travel

journey, making them easy to use, fun, and saving customers time and money.

A 'connected', seamless travel experience translates into benefits both for the customer and travel brands – from increasing satisfaction and building loyalty amongst engaged customers, and allowing brands to upsell and generate repeat business.

The customer journey on the following pages summarises the key findings from the study, with a more detailed report which explores the differentiated nature and online behaviours that exist across key digital travel segments.

Throughout, we also reference the overall digital landscape in Ireland – incorporating relevant context from 'Connected Life', TNS's leading global study of digital attitudes and behaviours of over 55,000 internet users across 50 countries, exploring how technology is transforming the lives of consumers across the world.

For further information, visit www.tnsglobal.com/connectedlife

A 'connected', seamless travel experience translates into benefits both for the customer and travel brands.

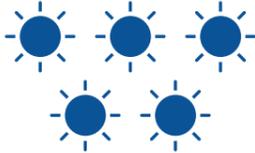
Who did we speak to?



Webloyalty partnered with TNS to survey a nationally representative sample of 1,000 adults online in Ireland in March 2015



This was to understand how they interact with digital technology across all stages of the travel journey



We focused on their most recent main holiday overseas (five nights or longer)

The customer travel journey

Inspiration, research and planning

The ease and availability of online sources to research holidays has allowed holidaymakers to become savvier. As a result they are spending less time on research, but are looking at more sources than someone who is predominantly researching their holiday using offline sources.

As technology improves so do consumer expectations – the two most important factors when booking online are:

- Price 92
- Ease of booking 87

Top holiday information sources used are all online:

- Online search engines e.g. Google
- Websites for a specific destination
- Travel booking websites
- Price comparison sites e.g. travelsupermarket.com, skyscanner.com

People who research holidays using social media and travel blogs are motivated by (%)



Motivations (All Ireland holidaymakers) %

Booking

The majority of holidaymakers (84%) are booking their holidays online, regardless of their digital awareness. However, the High Street still holds some relevance with just under one in five (17%) still booking their holidays offline.

Online and offline sources work in partnership when researching and booking holidays.

74% of holidaymakers who used offline sources for research...



...then go on a website to book their holiday



Post-booking / pre-holiday

Converting pre-holiday activity 'planning' into 'booking' represents the strongest opportunity for generating revenue between booking and going on holiday, with 31% planning day trips and activities but only 16% going on to book.

On holiday

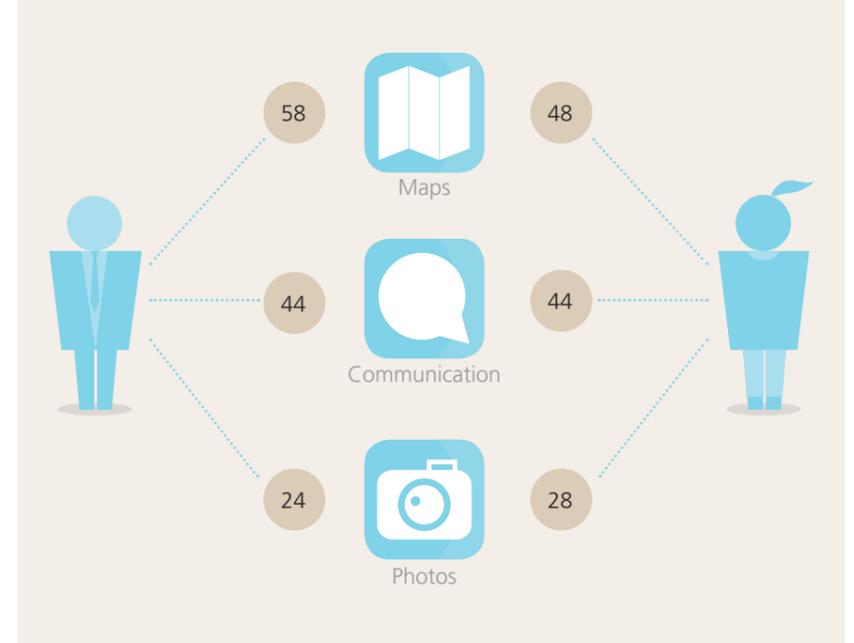
Most people rely on free Wi-Fi provided at accommodation whilst abroad (%)

Free Wi-Fi at accommodation	65
Free Wi-Fi at cafés/restaurants	56
International data deal	10
Bought extra data	16

Wi-Fi reliance is limiting potential of 'on-the-go' apps (%)

Map apps	53
Photo apps	26
Communications apps	44

Gender divide usage of apps (%)

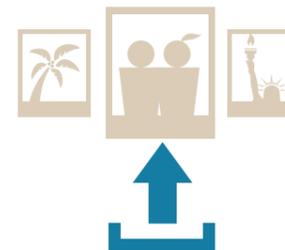


Base: those using smartphone or tablet on holiday

Post-holiday

Holidaymakers are more likely to upload photos:

'In the moment' on holiday	51%
When they get back home	47%



Outside of uploading photos, holidaymakers spend time online reminiscing about their holiday



Segmenting the digital holidaymaker in Ireland

We explore the ways in which people are engaging with individuals and travel brands at each stage of the customer travel journey, examining the interplay between online and offline behaviours across different age groups and attitudes to travel and digital.

Irish people who take overseas holidays fall into 4 key segments:

Digital Savvy Influencers	33%
Social Media Connectors	11%
Online Traditionalists	29%
Technophobes	27%

Over the next few pages, we have summarised each segment, looking at their digital profile and their behaviour and attitudes across the consumer travel journey: from research and planning, to sharing their experiences both on holiday and back home. Throughout the report we follow the customer travel journey through the lens of these digital travel segments.





Online activity whilst abroad includes: planning day trips and activities **42%** reading restaurant reviews **33%**

I have 1000 Twitter followers. It's the best way to communicate.



Highly influenced and very influential on digital and social media, adopters of new technology



Own slightly fewer devices, but are high users of mobile

I always forward offers on Facebook and Twitter, it's an easy way to save.



On holiday, they are sharing their experiences, and spend more time on social media sites and photo apps



When abroad they are most likely to use their smartphone **69%**



Heavily skewed towards the under 35s, they own more devices and spend the most time on them



The most thorough of travel researchers, they are more likely to research online and offline to plan their trip



High engagement on social media compared to other online channels



Most likely to be under 34



Most likely to use social media to research travel at the expense of all other online research methods

Their digital profile

Leaders when it comes to digital influence and social media engagement, Digital Savvy Influencers live online and are typically more vocal on social media.

Behaviour and attitudes to researching travel online

As the most thorough of travel researchers using both online and offline resources to plan their trip, their preference for information sources include:

Search engines	57%
Friends and family	44%
Destination specific websites	37%
Online price comparison sites	33%

Booking travel

Quite savvy about finding great deals, their preference for online continues in their booking channel – with most holidays or trips booked online. They are also early adopters when it comes to booking travel on mobile apps. Far from being anxious about online security, they have found ways to outsmart online travel brands and are likely to regularly clear their cache memory when checking flight prices.

Digital activity abroad

Few would consider a digital detox and turn off all devices when on holiday. In fact they are most likely buy extra data for their mobile or tablet so they can continue to be online 'on the go'.

They use a range of devices abroad:

Smartphone	69%
Tablet	33%
Laptop	33%

Holiday specific activities include:

Planning day trips and activities	42%
Reading restaurant reviews	33%
Booking day trips and activities	22%
Following travel or destination brands on social media	16%

Opportunity for travel brands

Far more likely to engage with travel brands online, especially via social media, Digital Savvy Influencers will both consume and broadcast content. Travel brands should look for ways to trigger conversations amongst this group to reach and influence other digital travel segments.

Their digital profile

Social Media Connectors are not especially interested in having the latest devices; accessing social media and connecting with friends and family is more of a priority. Logged on to Facebook throughout the day using mobile devices on the move or on the laptop in front on the TV – they regularly update their status and upload photos. Their device usage beyond social media is relatively unsophisticated.

Behaviour and attitudes to researching travel online

Favouring social media at the expense of all other online research methods, 1 in 10 (when doing their travel research) browse through comments and promotions on travel brands' social media sites. Holiday brochures are also used to complement their research (22%).

To research a trip online, they are most likely to use:

Travel booking websites	18%
Holiday price comparison sites	17%

Booking travel

They book their holiday travel and accommodation separately online.

Digital activity abroad

Though Social Media Connectors are more likely than average to switch off all online devices when on holiday, many will spend more time than average on social media sites such as Facebook, Instagram and Snapchat, and are more likely to use photo apps (40%) vs. the average Irish holidaymaker (26%).

Opportunity for travel brands

Open to following travel brands, Social Media Connectors are looking for useful information and personal benefit. Their interest is driven by visual prompts – both online and offline. Priority benefits or special offers that acknowledge these needs would encourage them to buy with a specific travel brand online. A mobile-centric, social-first strategy is also likely to be effective with them.



Most likely to research their trip using a search engine **74%**

I'm literally lost without my maps app, but I'm not fussed about not having Facebook 24/7.



A large proportion of time is spent on the internet as it is regarded as a key source of information

35+



They are more likely to be 35+ years old



Online on holiday, they are most likely to plan day trips and activities **38%**



Most likely to book a package holiday

I use Facebook to remember birthdays. It's a necessary evil.



Technophobes are large consumers of traditional media, and the least engaged with the digital and social aspect



Concerned about online security

45-54



They are more likely to be 45+ years old



Their primary method of researching and planning travel is through High Street travel agents

Their digital profile

Online Traditionalists take pride in knowing about the latest innovations. Extremely comfortable around technology, they enjoy being able to figure things out for themselves. They lack the same enthusiasm for social media, and a need for privacy as they get older is reflected in reduced status updates or photos posted and a culling of 'friends' on Facebook.

Behaviour and attitudes to researching travel online

Most likely to research and plan trips:

Through search engines	74%
vs. all Ireland holidaymakers	61%
Other popular methods include:	
Destination websites	47%
Online price comparison sites	36%
Friends and family	35%
Travel booking websites	34%

Booking travel

They book their holiday travel and accommodation separately online.

Digital activity abroad

Time online abroad is most likely spent planning day trips and activities (38%) and reading restaurant reviews (35%) perhaps explaining the low likelihood to have a digital detox when on holiday.

Opportunity for travel brands

Consumers rather than broadcasters of content, Online Traditionalists are some of the heaviest online researchers and utilise user reviews. Whilst open to brand engagement initiatives, their interaction with technology is purposeful. Brands must focus their engagement efforts around functional benefits.

Their digital profile

Slower adopters of technology, Technophobes are attracted by the tangible practical benefits rather than social uses of being online. Though they own a lot of gadgets, the use is functional e.g. tablet to read the news or the phone to text or make calls. They are drawn into social media like Facebook after years of avoiding it, only because they were feeling left out of conversations with family and friends.

Behaviour and attitudes to researching travel online

Their primary method of researching and planning travel is through High Street travel agents. They are less likely than average to research and plan through online sources.

Booking travel

Concerned about online security, they are relatively reluctant online shoppers. When it comes to travel, they are the most likely to book a package holiday 32% compared to 27% on average, or to book through a High Street travel agent.

Digital activity abroad

Technophobes are most likely to switch off all online devices on holiday (14%). Even if they do stay online, they are least likely to use social media (67%).

Opportunity for travel brands

As users of traditional media and retail channels, they are spending more time on offline entertainment, news and shopping. Technophobes need help in finding their feet in an online environment. The real opportunity for brands lies in facilitating this transition by finding ways to provide guidance and reassurance.

From inspiration to planning travel

Most Irish holidaymakers rely on multiple sources of information to research travel. 'More is not more', and holidaymakers expect a more streamlined experience which takes away the frustration and makes the process seamless.

The way people approach research differs by the type of holiday they are booking.

The range of online sources to research holidays has allowed holidaymakers to become savvier. As a result they are spending less time on research, but are looking at more sources than someone predominantly researching their holiday using offline sources.

Irish holidaymakers rely primarily on online sources when researching their trips, however, are conducting less sophisticated searches than their UK counterparts.

They are most likely to start with a simple Google search, complemented by searches on online price comparison and travel booking websites.

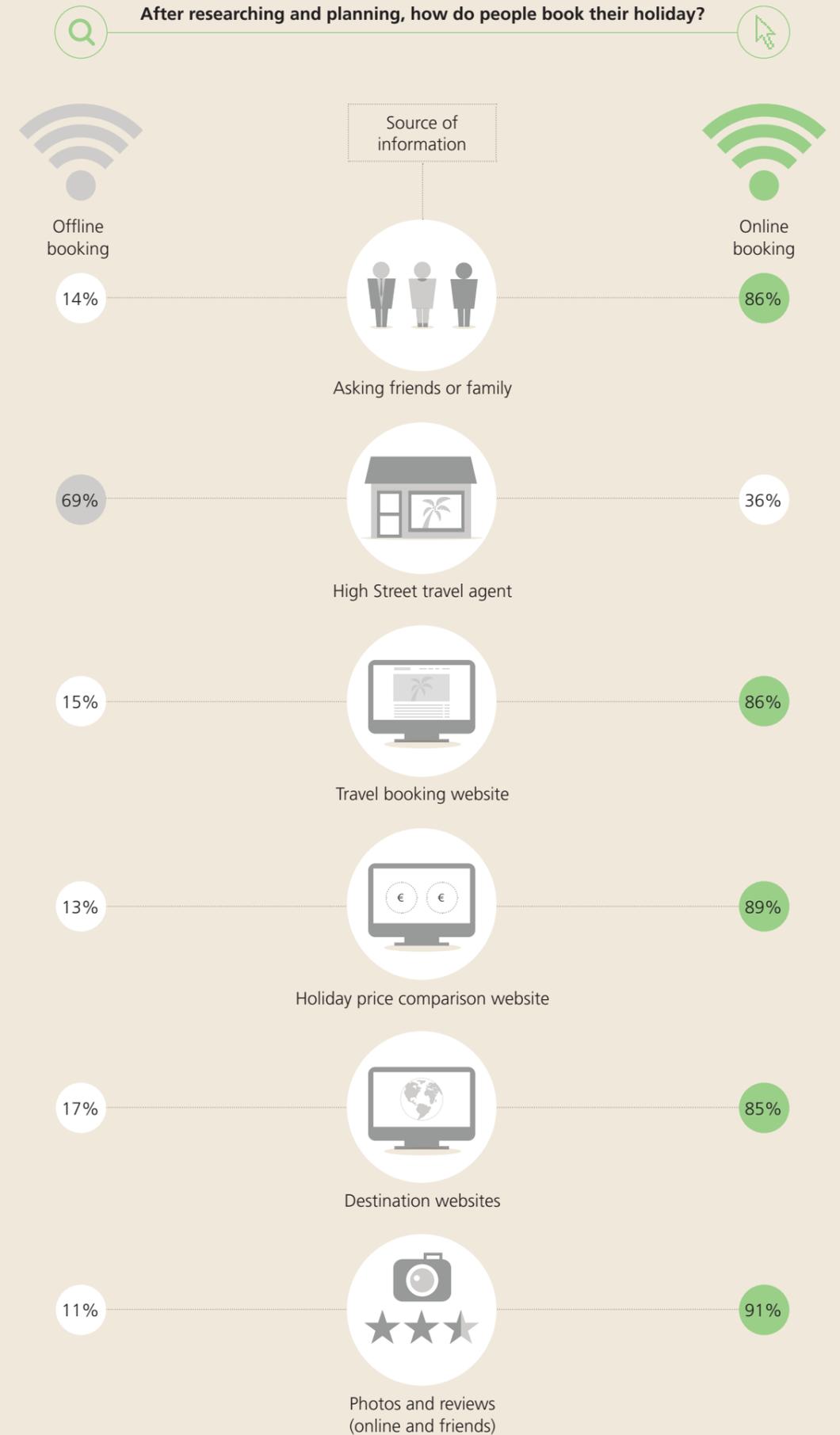
Online reviews play an important part in influencing holidaymakers at this stage

of the travel journey, with 57% of Irish holidaymakers using TripAdvisor when planning a trip.

Compared to the UK, Irish holidaymakers are also more reliant on recommendations from friends and family (39% vs. 26% UK), but this not altogether too surprising as they are also more likely to be visiting friends and family on these trips. On such trips, as the destination is already predetermined, the focus of the search online is on getting the best price and usually involves price comparison websites.

Social media also provided holiday inspiration. 1 in 4 doing an online search for holidays used Facebook and 1 in 10 YouTube.

"I like to compare different prices and different types of holiday before making a decision. I think that you're more influenced when you go into a shop by the person that's there."





Digital awareness influences how people are researching and planning holidays – whilst most are using online sources, there is still opportunity to increase traffic to sites by understanding who uses what and how.

Technophobes are less likely to research their holidays online. As a result, traditional ‘bricks and mortar’ holiday brand websites such as Thomas Cook and Thomson are preferred. The focus for this type of holidaymaker is more on destination choice and type of holiday on offer – they are less price sensitive.

If price comparison travel websites want to appeal to this audience, they need to showcase the variety of holidays and destinations they can offer.

“I always do my research online because it’s the only way to get good value.”

Digital Savvy holidaymakers tend to be a younger audience, using online sources to find the best deal and so they are most likely to use price comparison websites.

Travel booking websites can drive traffic by improving their price comparison facility or by ensuring their offers are included in an online price comparison search.

Search engines like Google – the most popular starting point when doing research – are now beginning to challenge websites specialising in travel by offering built in price comparison tools as part of its search functionality. Travel brands need to keep up with innovations which extend outside the sector if they do not want to get left behind.

Online Traditionalists in Ireland are most likely to use search engines when looking for holidays



Social Media Connectors are increasingly using photos, comments and promotions on social media as travel inspiration. There is a growing opportunity for travel brands to engage with this audience (13% compared to 8% of Ireland holidaymakers).

The use of online sources to research holidays is enabling holidaymakers to become more spontaneous. Holidaymakers are increasingly inspired by recommendations from people like themselves – especially online and on social media networks.

“I research online before I book my vacations or holidays because I want to know what the best price is and the best places to stay.”

The emergence of online and peer review sites like TripAdvisor encourages holidaymakers to be less risk averse and more adventurous when selecting a potential travel destination. People who consider online review sites as an important part of the research process are also more likely to want to explore a new destination.

Travel companies specialising in offering holidays geared around exploration, discovery and adventure should consider a social media and travel blog led strategy to reach these type of holidaymakers in Ireland.

With the proportion of people posting online reviews on return from their holiday decreasing, travel brands need to facilitate opportunities for capturing in the moment and co-created content.

Social Media Connectors rely on recommendations from others.

People who research holidays using social media and travel blogs are motivated by (%)



Motivations (All Ireland holidaymakers) %

Booking travel in the digital age

The majority of holidaymakers in Ireland (84%) are booking their holidays online, regardless of their general digital awareness.

Booking a holiday on a smartphone is a growing opportunity, particularly among the Social Media Connectors – 10% compared to 6% of all holidaymakers in Ireland. Mobile apps are also more likely to be used when booking a city break (9%). Ease of booking is an important factor for holidaymakers in Ireland, highlighting the need for travel companies to ensure a seamless experience from desktop to mobile booking.

The majority of holidaymakers (74%) who used offline sources (TV programmes, books/guides, travel articles, holiday brochures) to broaden their search, then go online to book their holiday.

Offline travel agent bookings are more popular amongst people booking a package holiday – 46% compared to 7% who book elements of their holiday separately. This affinity for ‘traditional’ holiday brands like Thomas Cook and Thomson amongst people booking a package holiday continues, with people favouring to book their package holiday directly on the travel agent’s website (Falcon 15%, Sunway 12%). Their main priority regardless of booking channel is ease of booking.

3 in 4 people in Ireland book their holiday travel and accommodation separately. This seems to be the preferred method, regardless of the type of holiday, but is especially the case if visiting friends and family or booking a city break. Their main consideration is price, and they are most likely to look at online price comparison websites. Price led promotions and value offers from travel companies will help entice consumers to progress from just looking to booking.



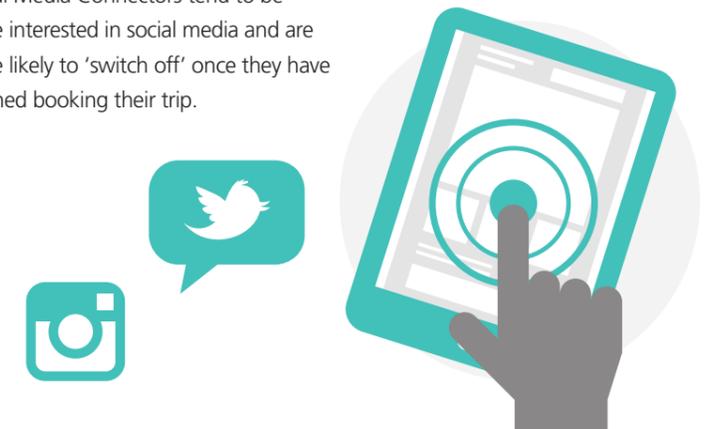
...then go to book their holiday online

What happens after booking and before going on holiday?

It is prime time for travel brands to engage customers by sharing useful information relevant to their trip and build loyalty

Online Traditionalists and Digital Savvy Influencers are most likely to be active online before going on holiday. However, few are actually booking day trips and activities in advance of travelling to their destination. To ensure an advance booking, travel companies should take advantage of their price sensitivity and offer deals on day trips and activities at the time holidaymakers book their travel or accommodation.

Social Media Connectors tend to be more interested in social media and are more likely to ‘switch off’ once they have finished booking their trip.



Activity levels online pre-holiday %

	Digital Savvy Influencers	Social Media Connectors	Online Traditionalists	Technophobes
Plan or research where to go on holiday	46	24	53	33
Search for accommodation before going on holiday	39	26	57	38
Booking accommodation	47	38	58	43
Search for transport before going on holiday	36	26	38	30
Booking transport	31	23	33	32
Plan day trips and activities before going on holiday	33	21	37	25
Book day trips and activities	16	10	20	13
Read reviews about accommodation or restaurants before going on holiday	49	32	61	46
Search for restaurant before going on holiday	27	21	30	20
None of these	11	12	7	14

● Most likely to do this activity online pre-holiday

COMPLETE BOOKING

The majority of holidaymakers in Ireland are using online sources when researching or planning their holiday, but only a small proportion stay online once the booking is complete. Converting pre-holiday activity planning into pre-holiday activity booking represents the strongest opportunity for generating additional revenue from holidaymakers in the gap after booking and before going on holiday.

Online Traditionalists are most likely to book extras before going on holiday – 1 in 3 book transport and 1 in 5 book day trips and activities.

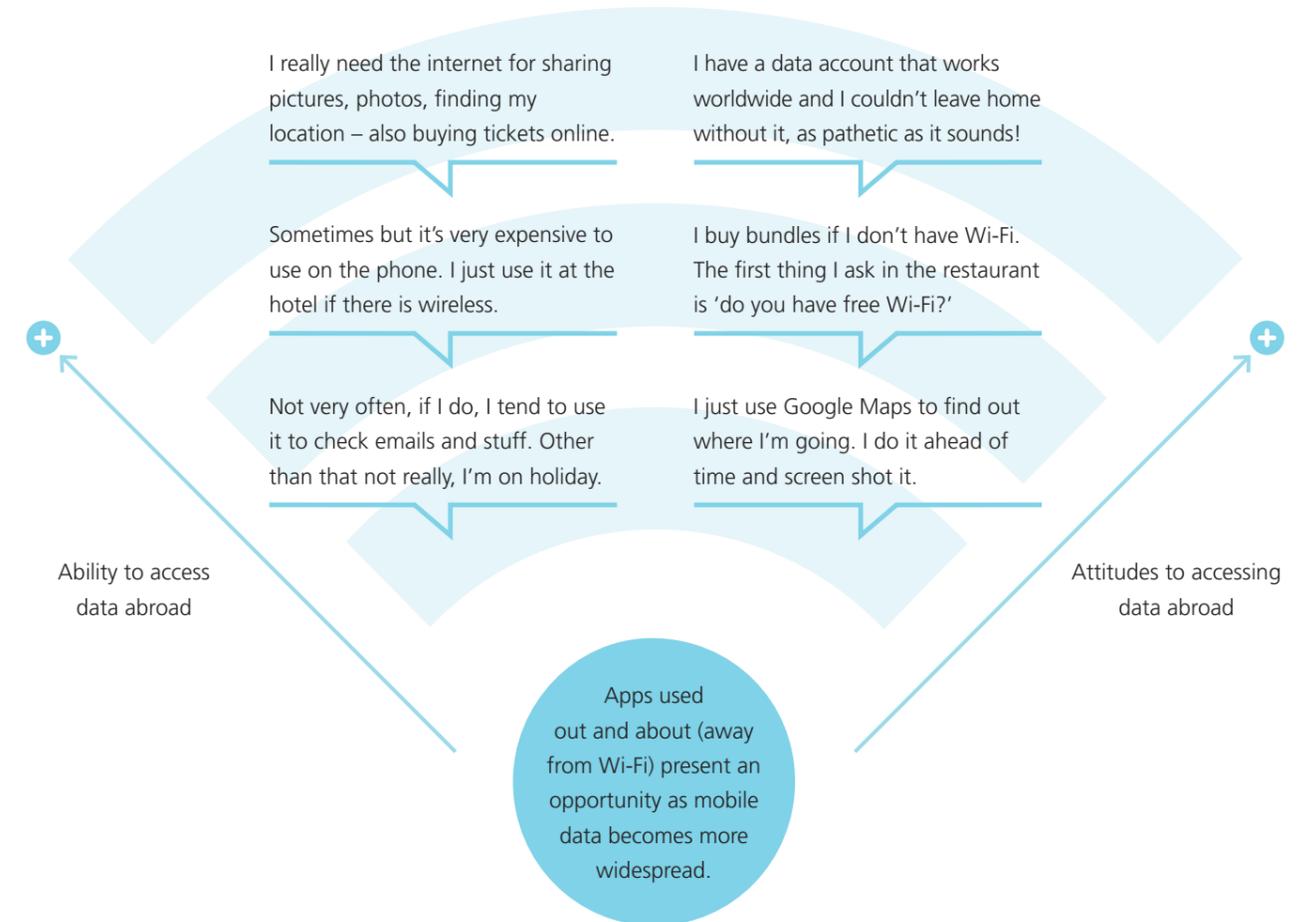
Social Media Connectors are least likely to spend more on booking day trips or activities in advance of the holiday. Offering them online savings and deals through social media offers the potential to squeeze more revenue from this group of holidaymakers. These discounts could be offered on a time-limited basis immediately after booking their holiday to target them whilst they are a captive audience.



Is our online behaviour on holiday evolving?

What online activities on mobile and social media influence the holiday experience? Are there areas of opportunity for creating a better customer experience?

Access and attitudes to data on holiday abroad



Attitudes and access to the internet on a holiday abroad

As data abroad becomes affordable, people's attitudes and behaviours will determine how much the internet is used when they are on a holiday abroad.

Access

When abroad, Irish holidaymakers are using a number of devices to pursue different activities. Smartphones allow holidaymakers to be more spontaneous with their social interactions – almost half are using communication apps and sharing their experiences on the go.

Half of all smartphone users going online abroad are uploading photos or videos onto social media – a quarter are using photo apps. This is fairly common amongst holidaymakers under the age of 34, and usage is set to increase now that there are fewer access barriers, such as data use abroad.

Tablets are used abroad for more practical reasons, with half using map apps, a third to plan day trips once at the holiday destination and a third read reviews about restaurants.

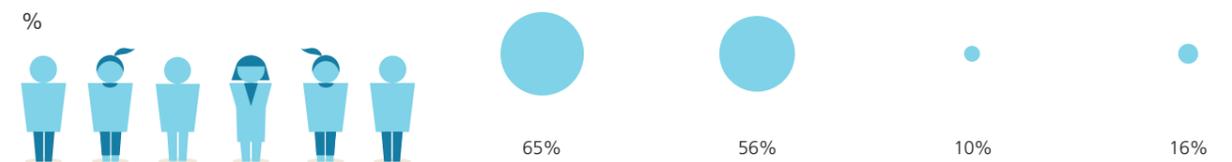
Attitude

Travel websites can continue their customer interaction on holiday by engaging with holidaymakers and encouraging peer-to-peer content through their social media channels. Brand content can be tailored to the type of holidaymaker e.g. practical advice for Technophobes, or fun and social recommendations for Social Media Connectors.

Mobile apps need to be quick, easy, and seamless so they are an enjoyable experience to complement a holiday. They need to tap into what holidaymakers want to do online abroad. 19% of holidaymakers leave online reviews during their holiday and 51% are uploading and sharing photos or videos. Travel review sites need to simplify the process, allowing users to take a photo and provide a star rating to express their opinion instead of writing a detailed review.

Access

How people get online abroad



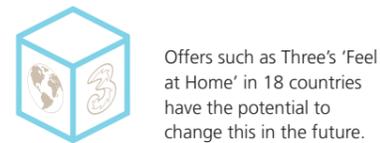
Wi-Fi reliance is limiting potential of 'on-the-go' apps
% App usage when on holiday



Smartphone or tablet – holiday app usage



Phone companies offering holiday data bundles or international data packages



Base: those using smartphone or tablet on holiday

"I use Citymapper to get around, that's it for me really."

"I don't post too much. I don't want to be that obnoxious person but I do a bit of showing off."

"I upload photos to show those at home what it's like and I'm having fun."

Wearable technology penetration is set to grow following the launch of the Apple watch. The next generation of travel apps will be for smart watches e.g. TripAdvisor's Apple watch app provides users with on-the-go recommendations such as local restaurants when lunchtime arrives.

Sites need to be optimised to ensure a seamless experience across all devices and to encourage additional research and booking activity when on holiday.

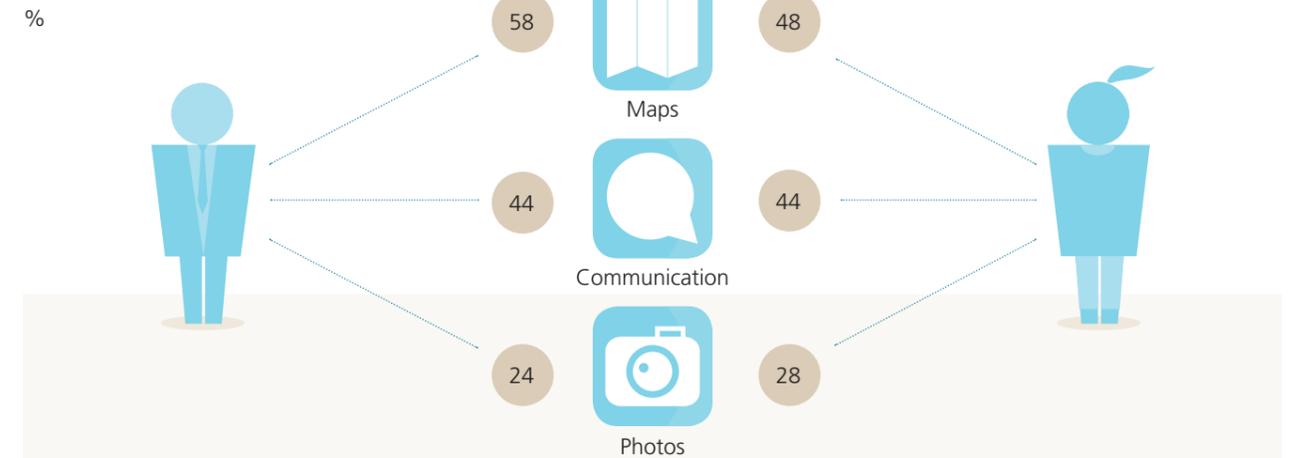
A picture paints a thousand words
Holidaymakers are visually focused, 1 in 3 look at pictures of their holiday destination whilst on holiday, and 51% upload their own images on to social media. Travel brands creating online content need to ensure it is visually engaging to get noticed and used.

Online priorities on holiday vary by age
Online activities when on holiday vary by age. 16-44 year olds are most interested in uploading photos or videos to social media and looking at pictures of destinations online. By contrast, 45-54 year olds are most interested in looking at pictures of destinations online, and the 35+ are more likely to post feedback on review sites like TripAdvisor.

There is also a growing opportunity for travel apps among 25-34 (15% downloaded an app compared to 9% of Irish holidaymakers).

The gender divide

Usage of apps



Base: those using smartphone or tablet on holiday

Sharing holiday experiences once back home

Facebook – the most popular social network site in Ireland across all age groups – is also the most popular way for people to share their holiday photos with friends and family.

Holidaymakers are more active online whilst on holiday and 'in the moment'. Once home, it is easy to get distracted by everyday routine and the likelihood of uploading photos from the trip reduces.

Holidaymakers are slightly more likely to leave reviews once they return, possibly after having had time to reflect on their whole holiday experience, with a quarter penning some form of feedback online.

Review sites can boost user-generated content by enabling short 'in the moment' reviews, such as photo and star ratings, prompting a more in depth review once travellers have returned home.

Social media sites could encourage users 'checking in' to upload photos at a later point in time, though this would have to be done in a way that was not overly intrusive.

"I never post reviews, but I do read them when they show up on Google maps."

"I have never posted a review before. I do look at them sometimes before I go on holiday but not during."

Post-holiday

Holidaymakers are more likely to upload photos:

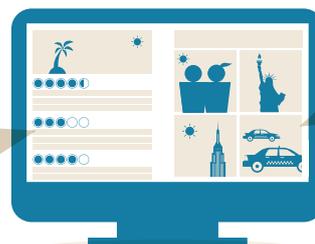
Whilst 'in the moment' on holiday 51%
When they get back 47%



Outside of uploading photos, holidaymakers spend time online reminiscing about their holiday

Posting reviews on TripAdvisor

23%



20%

Looking at photos of their destination



webloyalty

The TNS logo consists of the letters 'TNS' in white, centered within a solid magenta square.

About Webloyalty

Webloyalty is a leading online savings programme provider. We work with over 200 retail and travel businesses internationally to help them build stronger, more profitable relationships with their customers.

Through our membership programmes, we help our online retail partners' customers save hundreds of euros a year while providing the partner with an additional revenue stream. As well as incentivising customers to make repeat purchases at the partner's site, they can also earn cashback and get great deals on everything from fashion to electronics to travel at many top online stores.

Webloyalty started operating in the UK in 2007 and has since expanded into France, Spain, Ireland, Brazil, the Netherlands, Turkey and Australia. Webloyalty is part of Affinion Group, a global leader in customer engagement and loyalty solutions.

Please visit www.webloyalty.ie for more information.

About TNS

TNS provides insights based research and consultancy, and advises clients on specific growth strategies around new market entry, innovation, brand switching and customer and employee relationships, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, the data investment management division of WPP and one of the world's largest insight, information and consultancy groups.

Please visit www.tnsglobal.com for more information.

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