

EM
BR
YO®

Travel Marketing

Destination: Scalable growth

AMIN
WORLDWIDE

UK
SEARCH
AWARDS
2025 WINNER



Awin
Certified Agency
2026

WINNER
2025
UK
PAID
MEDIA
AWARDS

Contents.

	Page number
Executive summary	4
Who we are	5
A word from our Creative Director	6
Overview and market stats	7
Embryo Supertools: Needle	11
Section 1: OTAs and direct bookings	13
Section 2: Winning back the booking journey	17
Section 3: Social-first travel, inspiration & UGC	21
Section 4: Helping travellers find you through AI	25
Section 5: Trends shaping the wider travel journey	29
Predictions for 2027 and beyond	33
Embryo case studies	35
Embryo events & resources	39

Executive summary

- UK travel is a two-track market: an outbound/online travel market worth ~£23.5bn that's projected to reach ~£31.5bn by 2031 ([Mordor Intelligence](#)), and a domestic staycation sector generating £78bn in annual spend ([VisitBritain](#)). A marketing strategy built for just one side ignores a huge opportunity.
- The four largest online travel agencies (OTAs) invested a combined ~£15.14bn in marketing in 2025, buying reach most individual travel brands couldn't ([PhocusWire](#)). The winning approach uses that reach deliberately while building a direct relationship alongside it, not instead of it.
- Booking abandonment in travel runs well above typical e-commerce norms, driven by comparison-shopping behaviour rather than broken checkouts. The fix is recovery and transparent pricing, not just a shorter form.
- Social discovery is now unavoidable: TikTok is the top inspiration source for Gen Z travellers, and over 40% of all travellers have booked off the back of viral content – both for a staycation and a holiday abroad ([Euronews](#)).
- AI-assisted trip planning has roughly tripled since 2022. Being visible and structured for AI tools is now current best practice, not a future concern.
- Sustainability, long-form video research and review management are three underused levers covered later in this report – each backed by genuine UK-relevant demand, not just marketing trend-chasing.

We are a leading independent agency and trusted growth partner for ambitious businesses.

We combine the expertise of our people – across organic, paid and creative channels – with the power of our proprietary Supertools and an unrivalled client experience to achieve your business objectives and deliver valuable outcomes.

This report brings together extensive research with the expertise of the Embryo team. It's filled with valuable insights and expert analysis into the UK travel sector, covering staycations, travel abroad, and every stop in between.

We hope you find this industry report useful, and if you want to learn more about how Embryo can help you stay ahead in this competitive field, we would love to talk.



0161 327 2635



embryo.com



info@embryo.com

A word from our Creative Director

Travel marketing has a habit of making everywhere look beautiful, which creates a problem when everywhere starts looking the same. The opportunity now is to create brands and campaigns with a stronger point of view.

As younger audiences increasingly prioritise experiences, adventure, connection and shareable moments over more traditional markers of value, travel has become an increasingly important part of how people express who they are and how they want to live. People aren't just buying a destination. They're buying the feeling they hope it will give them, the memories they'll create and the version of themselves they get to be while they're there.

Beautiful visuals will always have a role, but they need an idea behind it. The future belongs to travel brands that can make people feel something before they've even booked.

Ben Topliss

The UK travel industry

Overview and market stats

Two Brits are booking holidays right now. One is researching an all-inclusive fortnight abroad, the other is planning a long weekend an hour deep into the English countryside. Yes, the final destination might be very different, but the search journey to get there is often quite similar.



Today's booking journey is made up of saved searches, TikTok suggestions, third-party reviews and recommendations from friends. Add in niche filters for dog-friendly pubs within a one-mile radius, and people often find themselves trapped in a long cycle of research before booking anything at all!

Before we do a deep dive into how we capture the attention of these holiday bookers, let's explore what the travel industry looks like for both frequent flyers and staycationers.

~£23.5bn

UK online/outbound travel market value,
2026 (growing to ~£31.5bn by 2031)

(Mordor Intelligence)

65%

Online travel agent share of UK
online travel revenue

(Mordor Intelligence)

87 million

UK domestic overnight trips
taken in 2025

(VisitBritain)

£78 billion

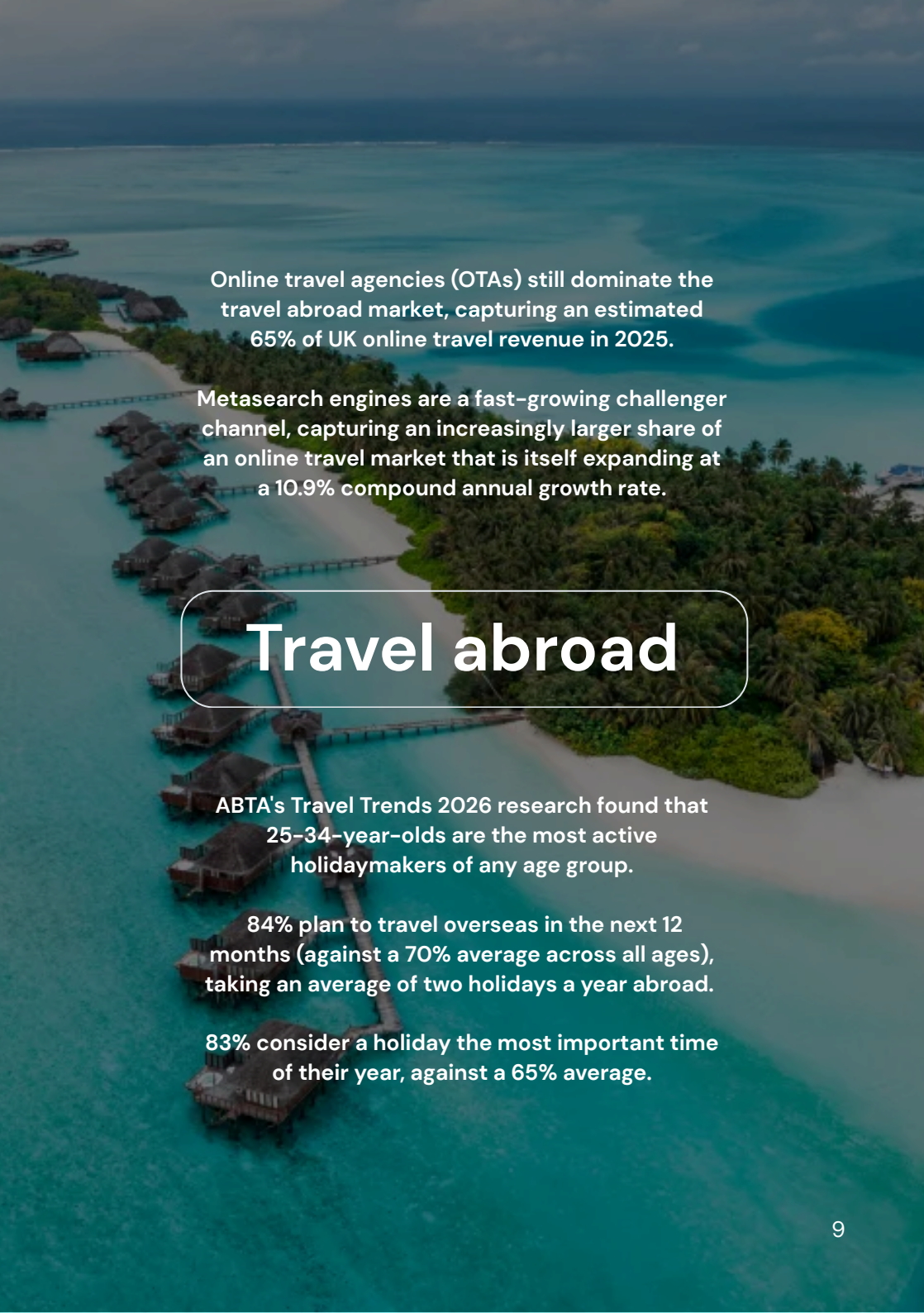
UK domestic tourism
total spend, 2025

(VisitBritain)

84%

of 25–34s planning overseas
travel in the next 12 months

(ABTA)



Online travel agencies (OTAs) still dominate the travel abroad market, capturing an estimated 65% of UK online travel revenue in 2025.

Metasearch engines are a fast-growing challenger channel, capturing an increasingly larger share of an online travel market that is itself expanding at a 10.9% compound annual growth rate.

Travel abroad

ABTA's Travel Trends 2026 research found that 25–34-year-olds are the most active holidaymakers of any age group.

84% plan to travel overseas in the next 12 months (against a 70% average across all ages), taking an average of two holidays a year abroad.

83% consider a holiday the most important time of their year, against a 65% average.



Domestic tourism remains a huge market in its own right, and shouldn't be treated as the secondary story.

In 2025, Brits took 87 million overnight domestic trips and 928 million day visits – spending £78 billion in total, up 3% year-on-year ([VisitBritain](#)).

Travel in the UK

The more interesting detail is that overnight trip volumes actually fell 3%, while total spend rose!

Brits are taking fewer staycations, but spending more on the ones they do take (overnight spend was up 6% to £29 billion).

Embryo Supertools: Needle

The organic search insights tool that reveals exactly where your brand sits within your wider industry.

Needle is a revolutionary organic search insights tool that doesn't just monitor your website but maps your entire industry. It's the difference between one moment and the full story.



Here's how Needle maps performance across 30 companies in the UK online travel agent sector:

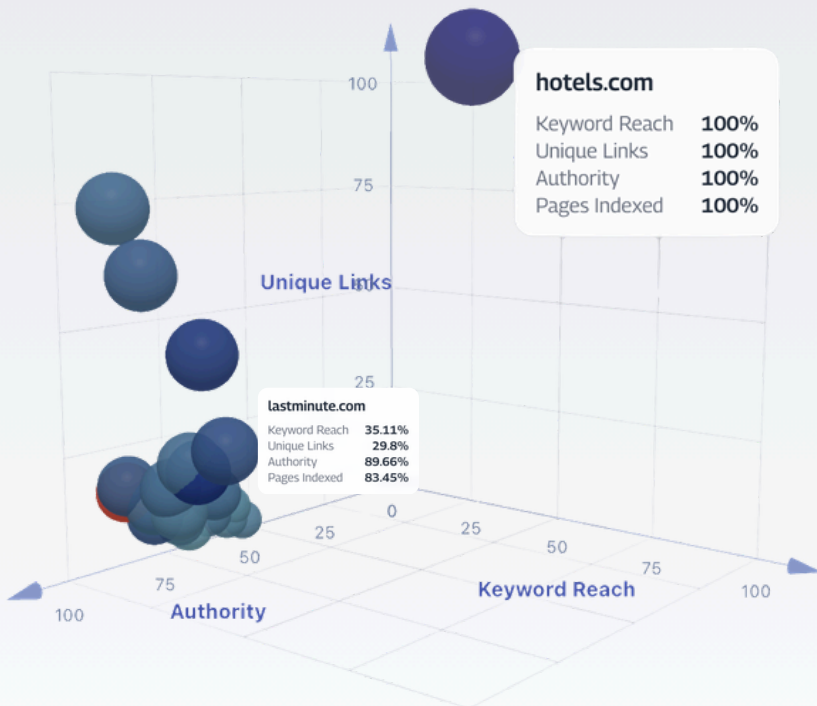
	Industry average	Top 25%
Links	12,126	42,310
Pages indexed	1,491,485	15,688,000
Domain authority	63	64
Keyword reach	100,923	595,463

How to read a Needle graph

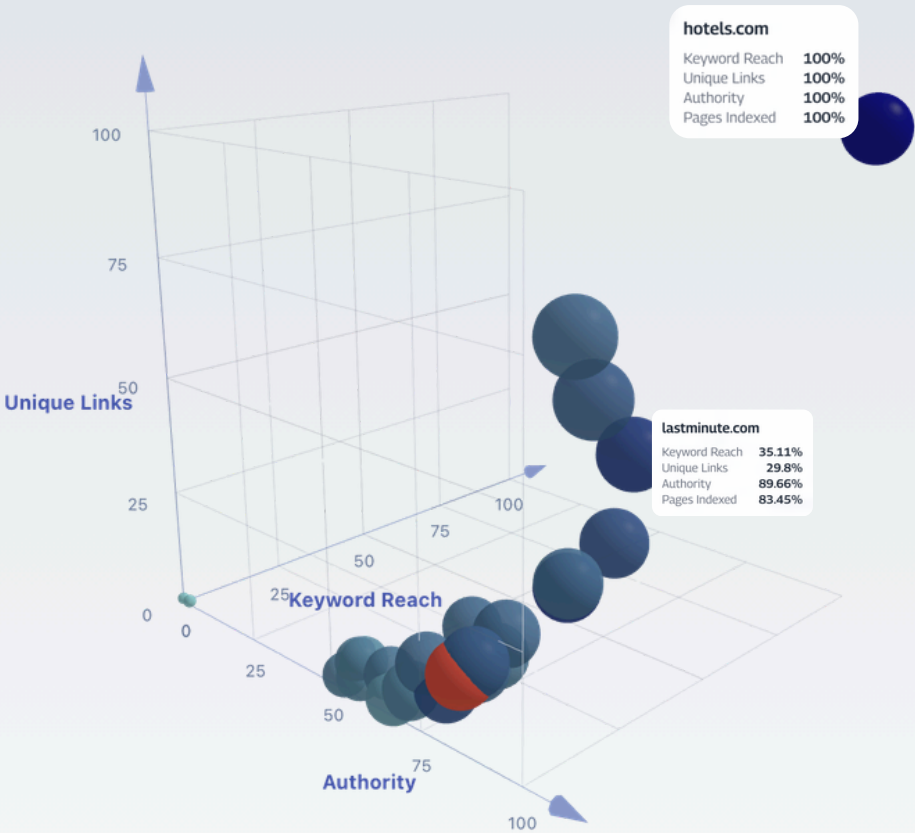
Each sphere on the three-dimensional axis represents a different brand. The size of the sphere reflects how much visibility that site has online. And the darker the sphere, the more pages it has indexed by Google.

The aim for any business is to grow from the bottom left of the graph (aspirational) toward the top right (industry leader). This arch-shaped distribution shown in 'View 2' turns up in almost every industry we've mapped, not just this one.

View 1



View 2 - Rotated 90 degrees



Each score is graded from 0-100. For example, if the site with the most links had 1,000 links, this would be given a score of 100%. A site with 500 links would be given a score of 50%, and so on. This is the same for each axis.

Online travel agents and direct bookings

~£15.14bn

Combined investment into sales and marketing by the top four OTAs: Airbnb, Booking Holdings, Expedia Group and Trip.com Group

Making both channels work for you

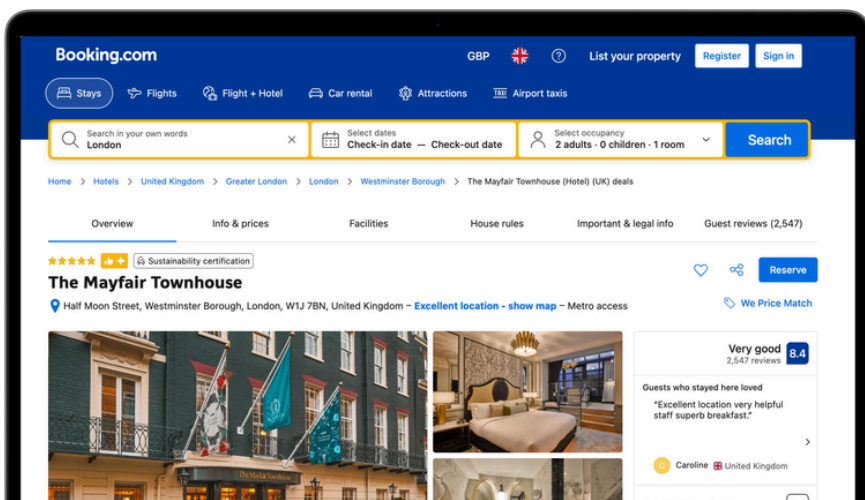
For independent travel brands, large OTAs can often seem like an obstacle to work around. But done right, they remain a genuinely useful channel. The four largest (Booking Holdings, Expedia Group, Airbnb and Trip.com) invested a combined ~£15.14 billion in sales and marketing in 2025 ([PhocusWire](#)), buying a scale of reach, trust and booking volume that most individual agencies, tour operators and hotels can't generate.



For a newer or smaller brand especially, OTA visibility is often exactly the kind of demand generation that makes a direct-booking strategy viable in the first place, not something in competition with it. The businesses getting the most out of this aren't picking a side. They're treating OTA presence as one deliberately managed channel among several, while steadily building the direct relationship that determines whether a customer books with you again next time or goes straight back to the OTA and, quite possibly, a competitor.

Get more from your OTA relationship

A listing left on autopilot is a wasted opportunity. Keep photography, descriptions and availability current, respond to every review (OTAs' own ranking algorithms tend to reward active management), and use the promotional tools, preferred-partner programmes or featured placements that most platforms offer. These often do more for visibility per pound than trying to outbid competitors on price alone.



The OTA will usually own the first booking; that's a fair exchange for the reach it provided. What shouldn't happen is the relationship resetting to zero afterwards.

A well-timed, on-property or post-stay invitation to join a loyalty scheme, book direct next time for a small perk, or simply follow on social, turns a one-off OTA customer into someone your own marketing can reach directly for the next trip - without breaching platform guest-contact rules along the way.

So... **how** do you do this?

PPC

Metasearch (Skyscanner, Google Flights, Google Hotel Ads) is growing at a rapid rate, making it a channel worth building presence in now, *alongside* OTA listings rather than *instead* of them.

Separately, audit brand vs. non-brand bidding discipline. Paying to appear for your own brand name when that customer was going to click through directly is budget that could fund metasearch presence or a direct-booking incentive.

SEO

OTA listings are, by design, standardised – the same format is applied to thousands of properties or itineraries.

But there's real room for direct-booking content alongside it: first-party reviews, photography and specific practical detail (local knowledge) that wins long-tail, high-intent search queries by filling the gaps left by standard listings.

Organic & paid social

Treat owned social the way the strongest e-commerce brands treat theirs: as a channel for existing customers as much as new ones.

A community of past guests and travellers who feel like insiders drives organic word-of-mouth and repeat bookings – crucially, on the one channel where you own the audience outright. Alongside that, use paid retargeting to bring back warm intent from people who researched a trip but didn't book.

Winning back the booking journey

Getting a customer to your site or app is only half the job. A lot of hard-won attention then disappears inside the booking journey itself.

Two problems show up again and again across the sector: booking technology that hasn't kept pace with how people actually shop for travel, and an abandonment rate that dwarfs the typical e-commerce journey.

The issue

Booking tech chosen for a different stage of the business.

Many travel businesses are still running booking technology chosen years ago for a smaller or simpler operation than the one they run today.

It shows up as friction: slow page loads, clunky multi-product checkouts, or a platform that simply can't support the campaigns that marketing wants to run.

The fix

Match infrastructure to complexity, not ambition.

As with any platform decision, there's no single right answer – only the right fit for a business's scale.

A template booking engine gets a small operator live fast but hits limits quickly. A mid-market booking platform with API flexibility suits most single-product hotels, agencies and tour operators. A bespoke build only earns its cost and complexity for businesses combining multiple product types like flights, hotels and car hire together, at high volume.

The issue

Booking abandonment is far above typical e-commerce.

Cross-industry cart and checkout abandonment averages 70.2% ([Baymard Institute](#)). High-value, high-consideration purchases like travel bookings routinely sit toward the top of that range – not because of a broken checkout, but because travellers are comparison-shopping across multiple tabs before committing.

The fix

Recovery and transparency, not just a shorter checkout.

Retargeting people who researched but didn't book, and showing transparent, all-in pricing early rather than adding fees at the final step, does more good here than shaving another click off the booking flow.



The issue

A clunky mobile experience – exactly where research happens.

Comparison and research behaviour for travel happens overwhelmingly on mobile, often in idle moments rather than at a desk. Any friction in that mobile journey causes users to abandon their search before reaching the booking step – and often without them leaving a formal complaint to flag the issue.

The fix

Design mobile as the primary research journey, not a scaled-down one.

Treat mobile as the primary research tool rather than an afterthought: fast-loading pages, streamlined date and traveller pickers, and a running total price shown throughout the journey – not just revealed on the final screen.



Social-first travel, inspiration & UGC

43%

of all travellers say a viral post or video has directly prompted them to book a trip or activity ([Euronews](#))



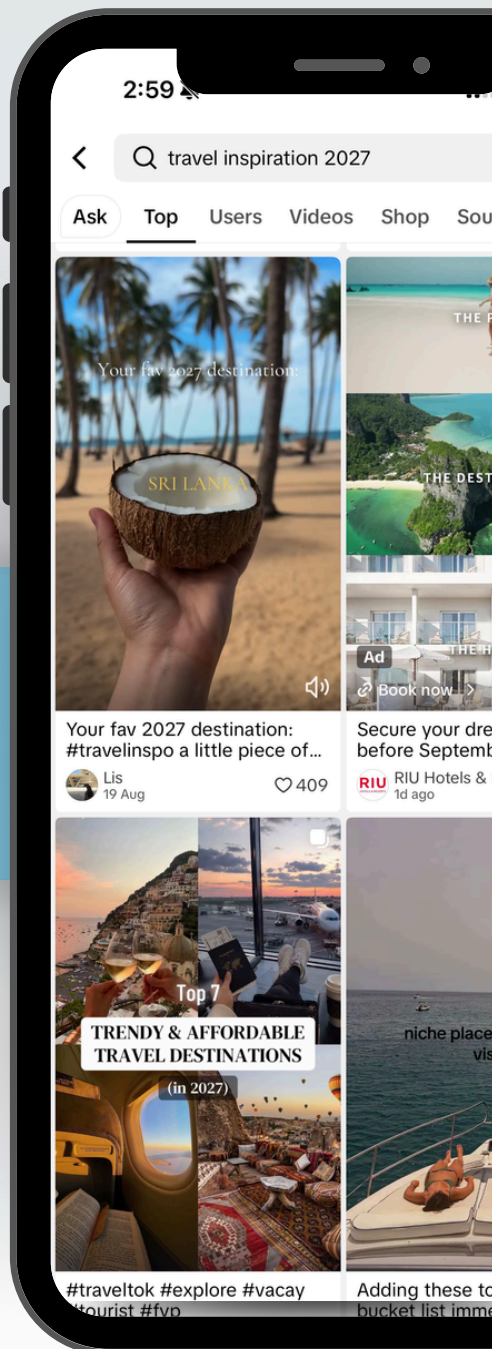
TikTok is now the single biggest source of travel inspiration for Gen Z (Euronews).

43% of all travellers say a viral post or video has directly prompted them to book a trip or activity, rising to 52% among millennials and 50% among Gen Z.

48%

of people cite TikTok as a travel inspiration source, sitting above friends and family at 43%

And it isn't just idle scrolling. Creator content converts too. 43% of travellers cite content creators as a factor in their decision-making, and 27% say they changed their destination because of an influencer recommendation.



A good chunk of this behaviour is aesthetic-led rather than purely destination-led. 39% of travellers visit tourist hotspots primarily to capture photos or video. But you should view this as an opportunity rather than an obstacle: the most visually compelling assets tend to win attention regardless of the underlying itinerary.



The problem for any brand sitting this out is that discovery has already moved to these platforms, whether or not a business has a presence there. That attention doesn't simply go unclaimed. The businesses pulling ahead are treating social as a core discovery channel, not an add-on to traditional marketing.

1. Short-form video as the new brochure

Video works especially well for tour operators and experience providers, where the product is inherently visual. Organic and paid short-form video should carry the weight a printed brochure or static gallery once did.

2. Partnerships, not one-off influencer spend

One-off paid posts disappear from feeds (and memories) within days. To drive real results, swap isolated campaigns for long-term creator partnerships, giving you continuous access to highly engaged travel audiences while building a permanent content library.



3. Shorten the path from inspiration to booking

Where native platform booking integrations exist, use them to make it as easy as possible for someone inspired by your content to book directly there and then. That doesn't rule out an OTA listing capturing the same customer later in their comparison-shopping (that's a reasonable outcome too), but the brand that made the first, most compelling impression should have the easiest possible route to a direct sale.

Helping travellers find you through AI search

Almost a quarter of travellers reported using generative AI tools to plan trips in late 2025 – nearly three times as many as in 2022 ([Deloitte](#)). That pace of adoption means being genuinely visible and well-structured for AI tools has moved from future-proofing to current best practice.

AI is your tool for understanding user intent

Traditional search engines love giving results with a direct keyword match, which means the results can also be brittle.

If a customer keys in a complex phrase like "3-night holiday in Tenerife for a family of four", traditional search engines can serve up irrelevant results, which is a massive conversion killer.

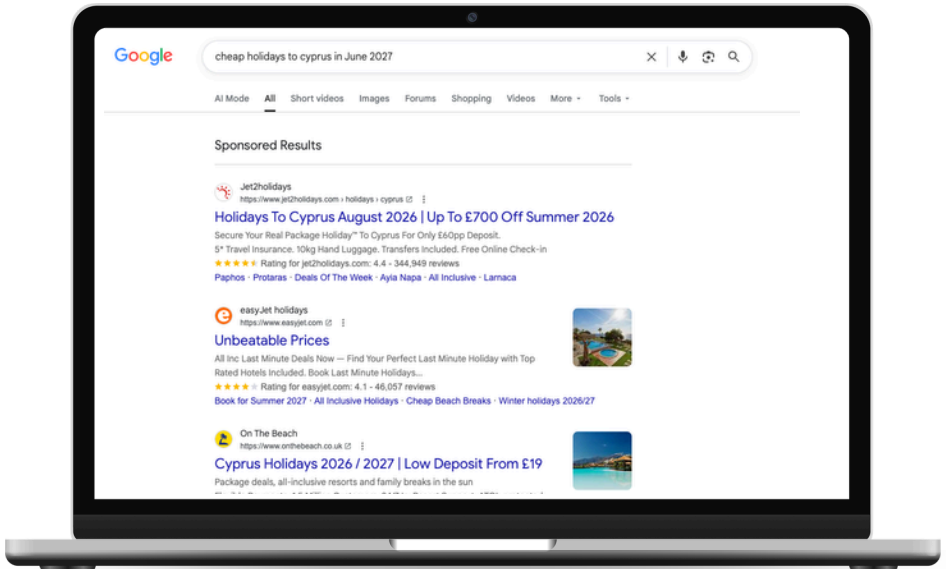


AI tools don't simply look for keyword matches on your website. They look for evidence that your business is trustworthy, relevant and capable of answering a user's question. AI search engines look at user intent and context, transforming travel discovery from a rigid database query into a natural conversation, where users can ask follow-up questions much like they would with a personal travel agent.

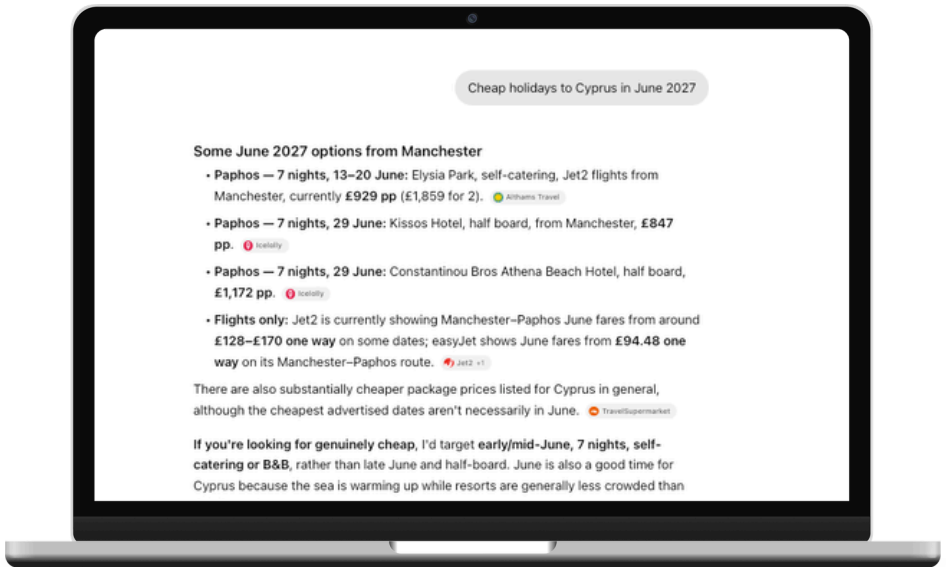
Be the trusted source that an AI tool recommends

Ranking well in a traditional search results page doesn't guarantee visibility inside an AI-generated answer, which draws from a narrower, more selective pool of sources. A brand that's invisible to AI tools today may find that gap widening quickly as adoption keeps climbing.

Google search



ChatGPT search



Your AI visibility checklist

- ☐ Look beyond traditional keywords and the standard '10 blue links' by targeting snippets and segments.
- ☐ Keep content original and ensure you always have consistent, unique views on topics.
- ☐ Build authority by securing mentions and citations from external sources through targeted digital PR and off-site strategies.
- ☐ Aim for 2,000 words when producing guides and comparisons, as AI picks up long form best.
- ☐ Answer questions clearly and thoroughly. Structuring them in an FAQ format works best.
- ☐ Consider real-life terminology, weaving alternative phrases and use cases into content naturally.
- ☐ Attribute expertise and data to valid sources. Internal data and perspectives prove incredibly valuable.
- ☐ Continue updating and refreshing content. AI cites up-to-date content that is clearly date-stamped and regularly updated.
- ☐ Create an FAQ/glossary page that answers all the questions customers may have about your brand.
- ☐ Consider video content and get involved in Reddit forums. Community opinion and cross-channel brand references are considered by AI.
- ☐ Apply SEO improvements to a small test group of pages, e.g. clearer page structure, stronger entity signals, improved internal linking and enhanced structured data.

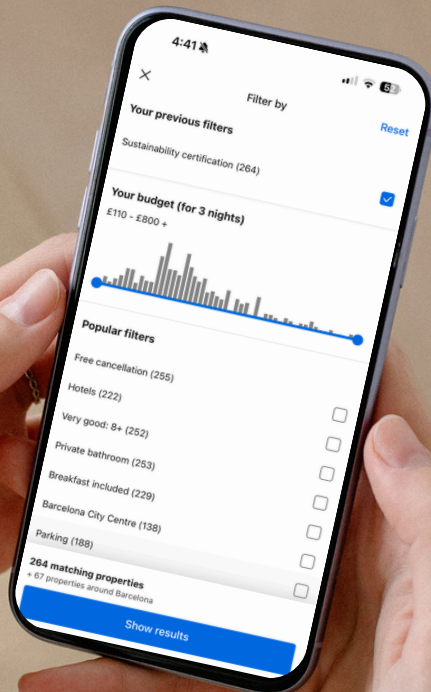
Written by our Head of Content, Shona Worsman

As a senior member of the organic team, Shona applies her passion for content creation to ensure we're always delivering effective and engaging copy that generates results for our clients. She keeps her finger on the pulse of Google updates and wider SEO trends to keep all of our writers informed of best practices, including the list above.



Trends shaping the wider travel journey

- Sustainability
- Long-form video
- Reviews and reputation



Sustainability

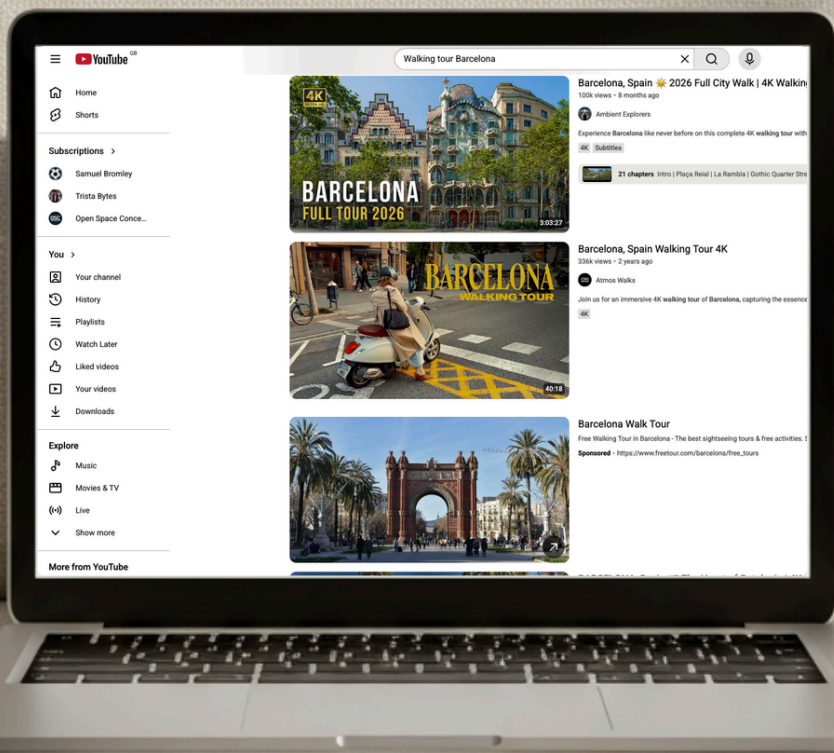
85% of travellers say that more sustainable travel is important or very important to them, and the appetite is strongest among the exact audience that ABTA identifies as the sector's most active holidaymakers: Gen Z and millennials ([Booking.com](https://www.booking.com)).

This is translating into bookings, not just sentiment: 100 million overnight stays were booked at certified sustainable properties in 2025. Roughly a third of travellers across every generation plan to do the same going forward, and 74% now factor extreme weather risk into where and when they travel.

Long-form video (especially YouTube)

Nearly half of travellers use online video when researching where to go, rising to 65–67% at the point of actually choosing a destination or activities, and 63% when deciding on accommodation (PhocusWire). YouTube alone reaches around two-thirds of the UK population: 42 million monthly viewers, with watch time up 37% year-on-year.

For higher-consideration bookings (cruises, multi-day tours, long-haul holidays), long-form video presents a huge opportunity to build credibility. A walkthrough, Q&A or an honest, warts-and-all guide provides essential reassurance to hesitant customers. Treat short-form as the hook and long-form as where a genuinely undecided traveller gets converted.





Reviews and reputation:

The trust signal that closes the sale



81% of travellers always or frequently read reviews before booking accommodation, and 52% say they'd never book a hotel with no reviews at all ([Tripadvisor](https://www.tripadvisor.co.uk)).

Given identical properties, 79% are more likely to book the one with the higher rating, and the average traveller reads around nine reviews before deciding.

Review volume and response rate are marketing activities in their own right, not just a customer service task. A structured request process after every booking and a reply to every review (both good and bad) can work wonders at exactly the point a comparison-shopping customer is deciding between two options.



Predictions for the travel industry in 2027 and beyond



AI agents will start booking simple trips end-to-end

As adoption keeps climbing from today's near-25% planning usage, brands will need to focus on being the trusted, well-structured source that AI agents recommend.



Social platforms will keep shortening the gap between travel inspiration and direct booking

With over 40% of travellers already booking off the back of viral content, expect more of the funnel to move natively on-platform, alongside OTA and marketplace listings.



Direct-booking capability will become a board-level priority, not a replacement for OTA strategy

Brands pulling ahead on margin will be the ones investing in content and owned-audience strategy on top of a well-managed OTA presence, rather than treating the two as either/or.

Case studies

We take pride in all our client work and the campaigns we've built together, and we have delivered some truly exciting results across the travel and tourism industry.

Covering organic, paid and creative channels, these are just a few that we're particularly proud of.

Case study

Sussex Modern

S
M

Sussex Modern is the wine tourism development agency for Sussex. It secured funding for a campaign around the Turner Prize, designed to turn exhibition visitors into overnight stays.

We built the campaign around an independent and culturally diverse Sussex, appealing most to people who like to 'discover' rather than follow the crowd.

Results:

2 million

OOH impressions

10k

Site visits from Meta



Case study

The Inn Collection Group



The Inn Collection Group, a premium hospitality operator in Northern England, partnered with us to scale their online presence and move beyond brand-name searches. The primary objective was to capture "discovery" traffic by ranking for non-branded, location-specific keywords (e.g. "hotels in Northumberland").

Technical & organic SEO: A comprehensive audit doubled the site's health score from 36 to 71. Our team implemented a localised content strategy, optimising for high-intent regional terms and amenities.

Performance PPC: A paid search strategy targeted lookalike audiences and top-of-funnel keywords. To maximise efficiency, we used a commission-based bidding model, ensuring spend was tied directly to confirmed bookings.

Results:

87%

Increase in conversions

10.3

ROAS

166%

Increase in clicks

Case study

The Wedding Travel Company



Within 12 months of working with The Wedding Travel Company on their PR and organic strategy, we achieved the following results.

Results:

566%

Increase in ranking
keywords

15%

Increase in consultations

83%

Increase in organic traffic

8%

Increase in bookings

15

PR stories generating 81
links

Page 1

Ranking for multiple
keywords

Stay ahead of the curve

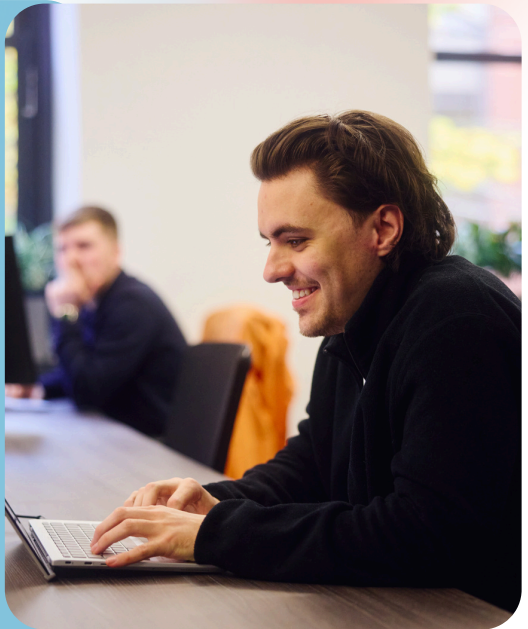
Some of the points we've discussed here will no doubt evolve again in just a few months; new buyer trends will emerge, and Google's algorithm will shift again.

Your marketing development doesn't stop with this report. Our in-person events and free resources are here to help marketing industry professionals stay on top of their game.

Expert resources



Embryo events



If at any stage you are looking for a strategic partner to help you implement these changes and drive results across every channel, our team is here.

For a conversation about your specific goals and how we can apply these principles to your business, please get in touch.

To help you find your starting point, we're offering a free online visibility and competitor analysis report.

Powered by our proprietary Supertools, your bespoke report will help turn complex data into actionable insights. It will give you a clear, data-driven snapshot of your current performance, benchmark against your key competitors, and uncover the immediate opportunities you can take advantage of.



Get a bespoke competitor analysis



Transforming potential.

**Growth partner for
ambitious businesses.**

 2nd Floor,
127 Portland Street,
Manchester,
M1 4PZ

 0161 327 2635

 info@embryo.com

@embryoagency

