
May 2022

The U.S. Travel & Hospitality Industry

An Organic Search
Research Report



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Introduction

At the start of pandemic shutdowns in Q1 2020, the once predictably seasonal U.S. travel industry saw [air passenger volume drop 90% and hotel stays fall 75%](#). In 2021, the industry saw improvement as vaccines emboldened some travelers to again move about. Two years on, the availability of vaccines for nearly all age groups along with the receding – at least, temporarily – threat of COVID have travel demand on the upswing.

Industry forecasters hold a generally optimistic outlook for 2022. In the hotel industry, [CBRE predicts](#) that in 65 major U.S. markets that it tracks, all markets will see an increase in average daily rate (ADR), which represents the average revenue for each occupied guest room. This will be the first time the hotel industry has seen universal growth since 2014. More broadly, the [World Travel & Tourism Council](#) estimated industry growth in 2021 at 35.6% over 2020 with another 28.4% bump forecasted for 2022.

BrightEdge, as the leader in search performance, is uniquely positioned to explore consumer interest in travel as measured by search data. In this report we delve into a deeper analysis of search trends around travel, but the key takeaway is this: interest in travel showed strong signs of recovery beginning in 2021, and through the first two months of 2022, the trend appears to be accelerating.

The growth the industry saw in 2021 and is forecasting for 2022 is encouraging, though some changes will likely persist longer-term. As sectors of the corporate economy have adapted to remote work, executive leaders will likely look to curtail travel compared with pre-pandemic levels. Shorter term, filling the void from shuttered businesses, eliminated flight routes and other elements of the travel economy will likely take some time. Ultimately, while the outlook for the U.S. travel industry in 2022 is certainly improved, the threats from a potentially resurgent virus, war in Ukraine and soaring inflation require some caution.

Methodology

Organic search is a useful indicator of consumer intent. To better understand the nature of consumer attitudes and the dynamics of consumer interest across the U.S. travel industry, we conducted an analysis of organic search trends related to travel using BrightEdge [Data Cube](#).

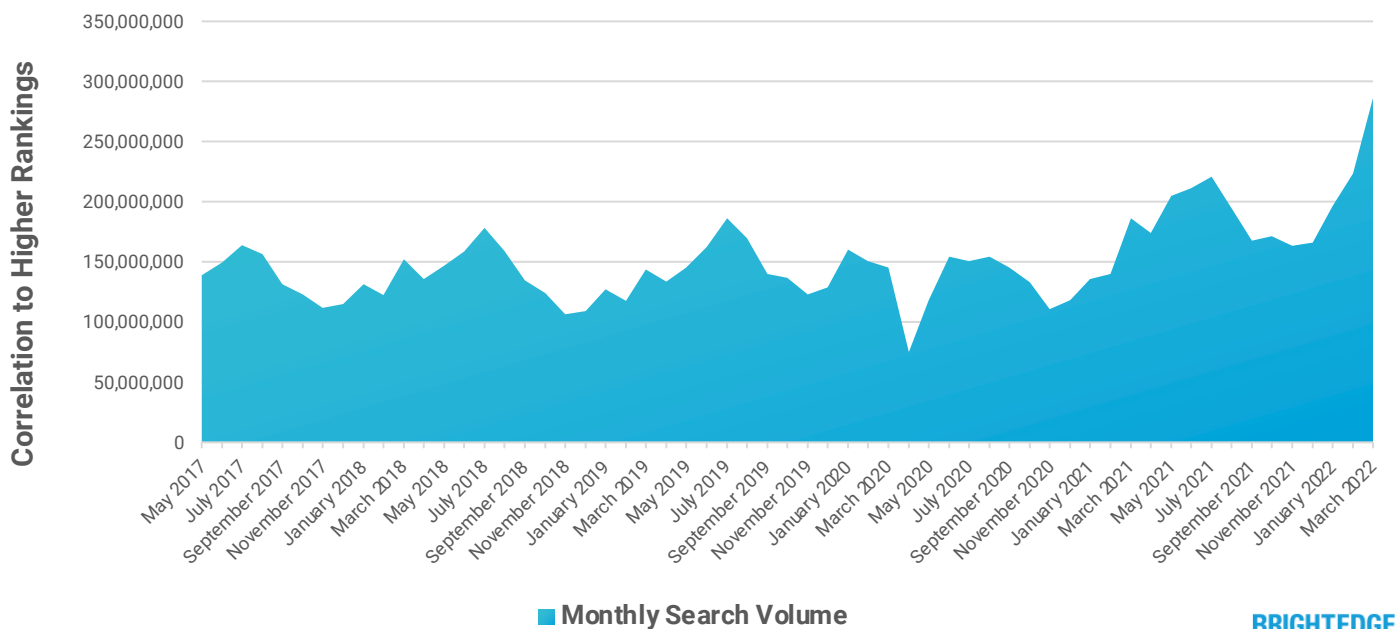
We looked at trends in four categories for approximately XXXXX number of keywords related to three segments of the U.S. travel industry: flights, hotels and things to do/activities. We also looked at those segments in aggregate. The four categories we analyzed are: **1) search volume trends, 2) authority, 3) growth and performance and 4) share of search**. Together, these analyses can help us understand patterns and anomalies in consumer interest over time, which domains are earning the lion's share of ranked search results and clicks, and what type of search results are capturing clicks – an indicator of the nature of the interest in the topic and how brands should plan and present their content. For each of the four categories of analysis, we provide some observations, but encourage readers to spend some time with the corresponding graphs, which may offer insight unique to their specific situations.

Search Volume Trends

Overall Market

Search volume helps us see how interest in travel trends over time, as well as how much interest there is at any point in time. Here we are looking at travel and the previously listed segments of travel over a roughly four-and-a-half-year period. For travel overall, we see a fairly consistent pattern of interest until a sharp, uncharacteristic dip at the start of the pandemic. The dip levels off relatively quickly but stays below typical levels for about a year at which point a recovery begins. Interestingly, the recovery in interest in 2021 leads to record levels compared against the approximately four years prior, including the period preceding the pandemic. Initial data from January and February 2022 suggest that if search volume stays on course, it will likely beat the volumes of 2021.

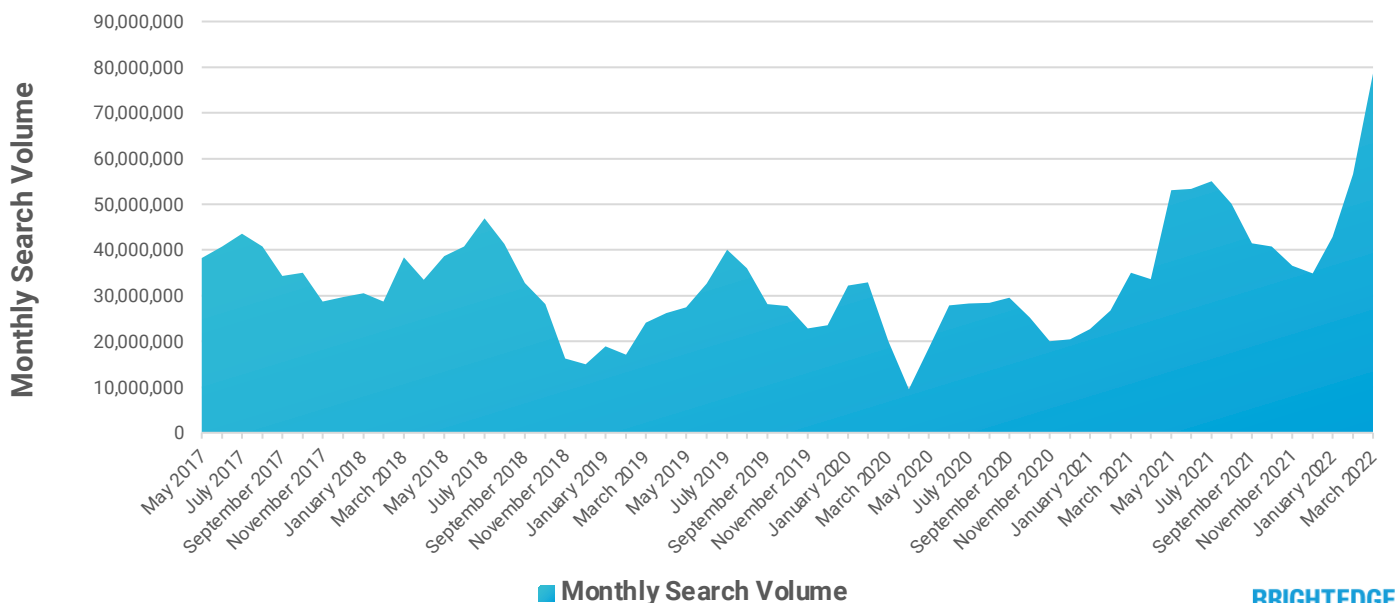
Total Market Search Trend



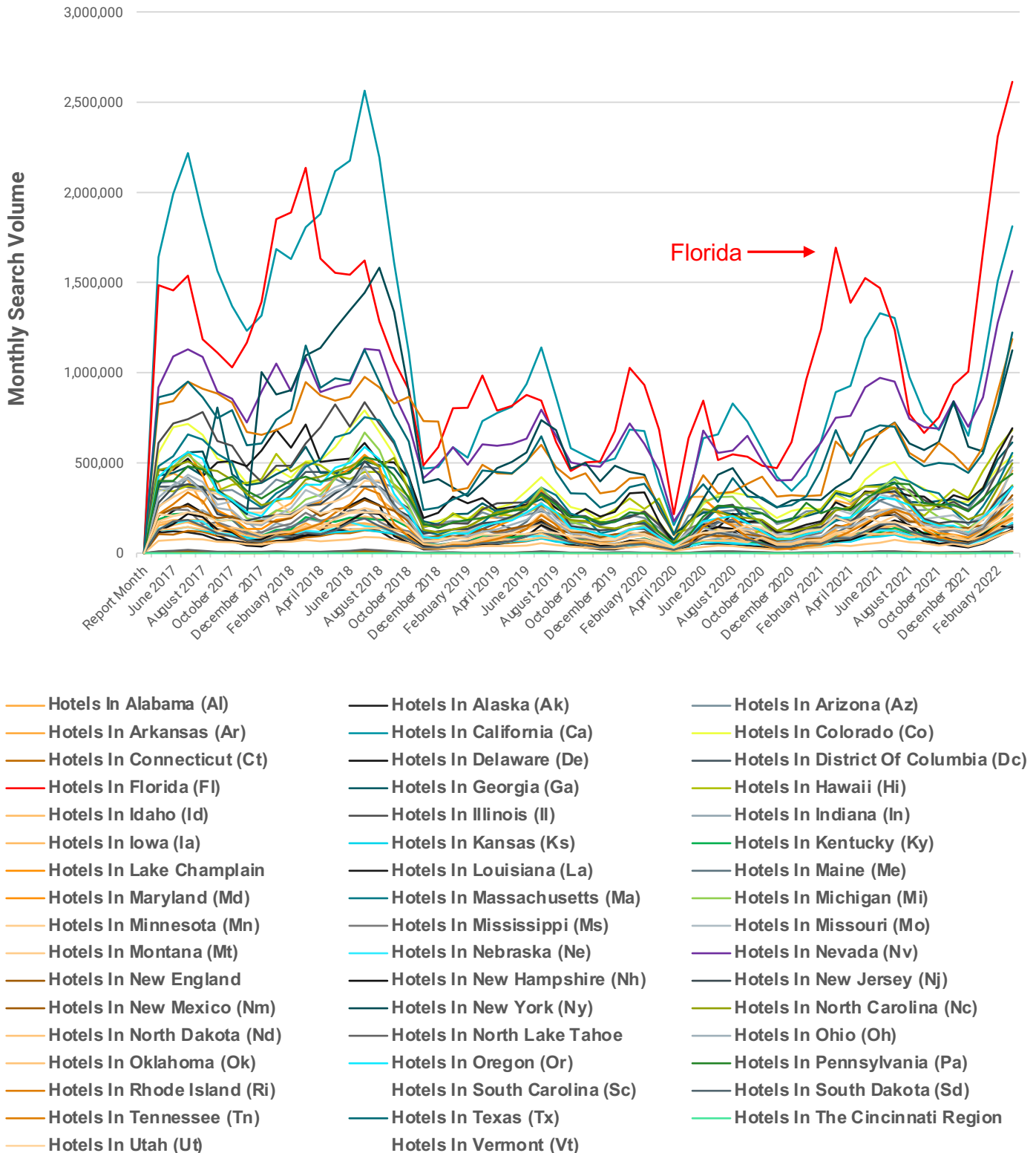
Hotels

Search volume around hotels tracks closely to the overall market, which we can see in the graph titled “Hotels | Total Search Trend.” Importantly, search volume in 2021 sets new records for the measured period. In the graph titled “Hotels | Search Intent by Geography” we see search demand for Florida recovering sooner in 2020 and at a much higher level than in the same period for the prior two years. Already a leading travel destination, the state’s relaxation of pandemic rules likely drove the higher level of interest in that period.

Hotels | Total Search Trend



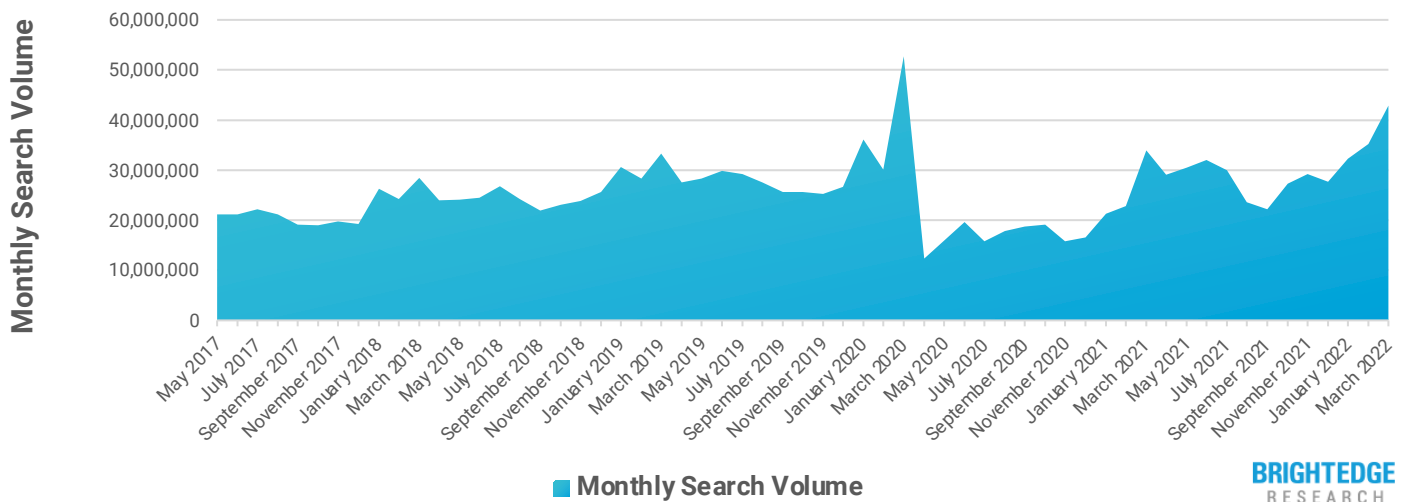
Hotels | Search Interest by Geography



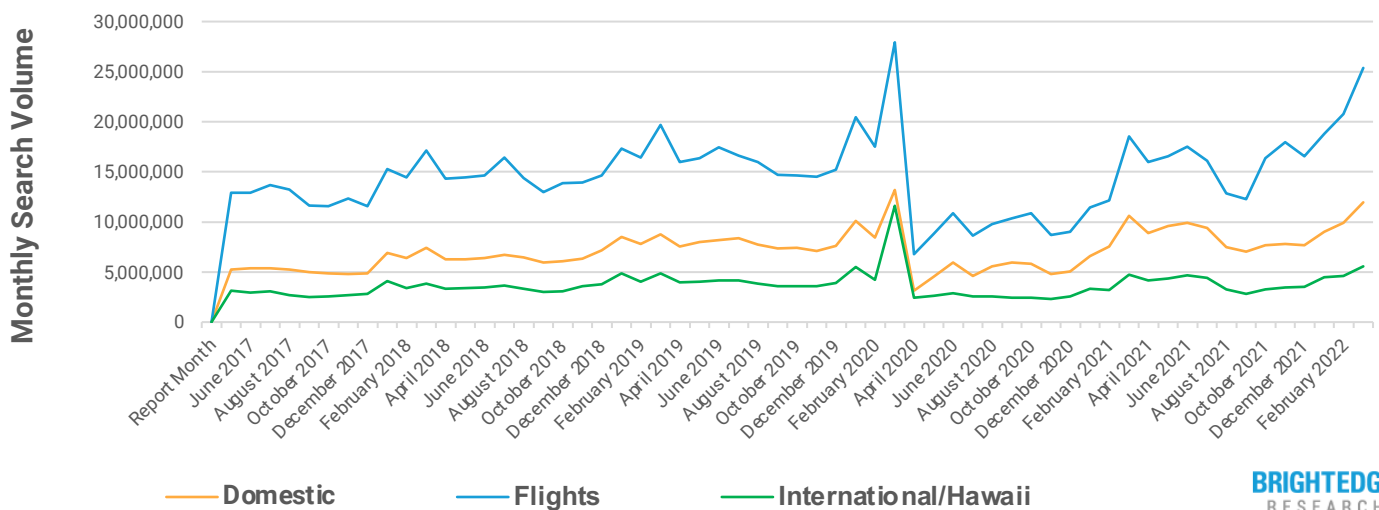
Flights

With flights we see the value in closer investigation of sub-segments. At the start of the pandemic, in February and March, search volume for flights defied the overall trend for travel during the period as people scrambled to fly home. This trend is starkest in the graph titled "Flights | Search Interest by Type." Here we see that search interest in international flights, which typically lags interest in domestic flights, nearly matches the volume for domestic flights during the initial pandemic spike. Moving into 2022, search interest in flights follows the higher, upward curve of the overall industry.

Flights | Total Search Trend



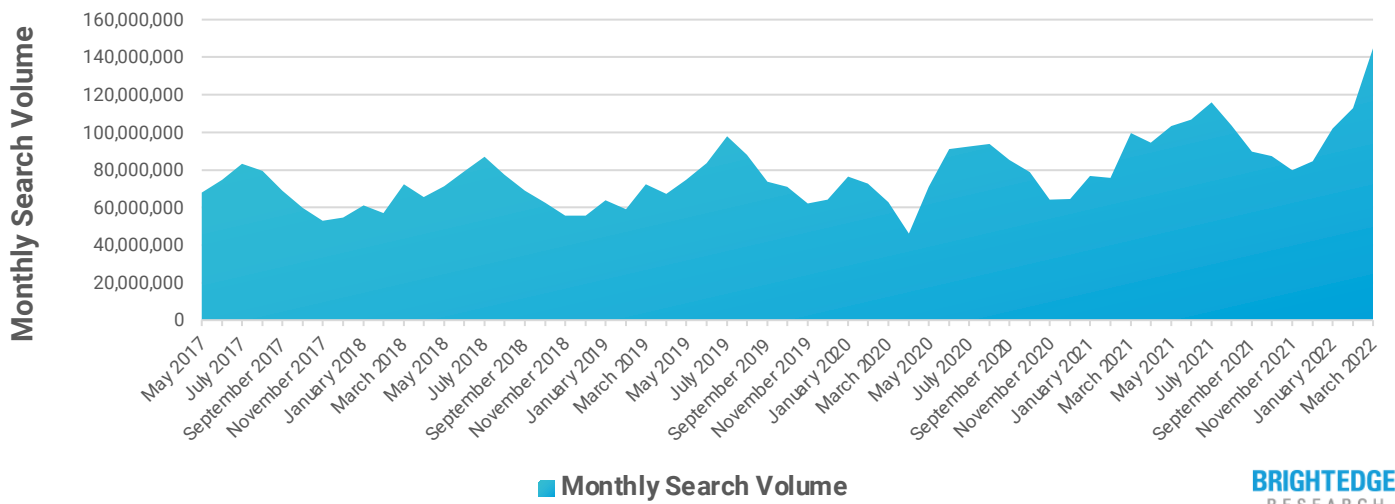
Flights | Search Interest by Type



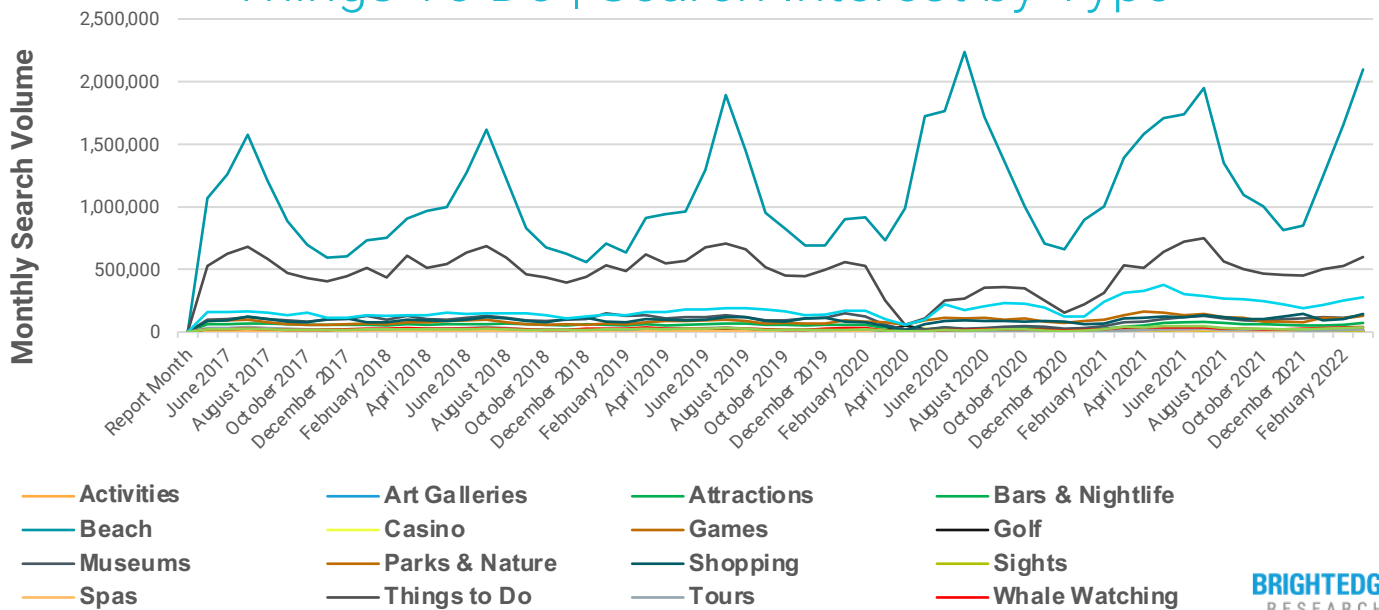
Things to Do

Interest in things to do follows the broader industry's overall curve closely and may be driving a lot of the shape of the curve as it represents about half of the volume of overall search. In the "Things To Do | Search Interest by Type" graph, interest in the leading category of "Beach" remains high and appears to have dodged the pandemic dip despite the dip having occurred during the period of Spring Break. Perhaps this tells us something about the risk tolerance of beachgoers.

Things to Do | Total Search Trend



Things To Do | Search Interest by Type



Authority

To get a sense of both the dominant players in the space and the nature of the sites and content capturing clicks, we analyzed the top domains in search.

Overall Market

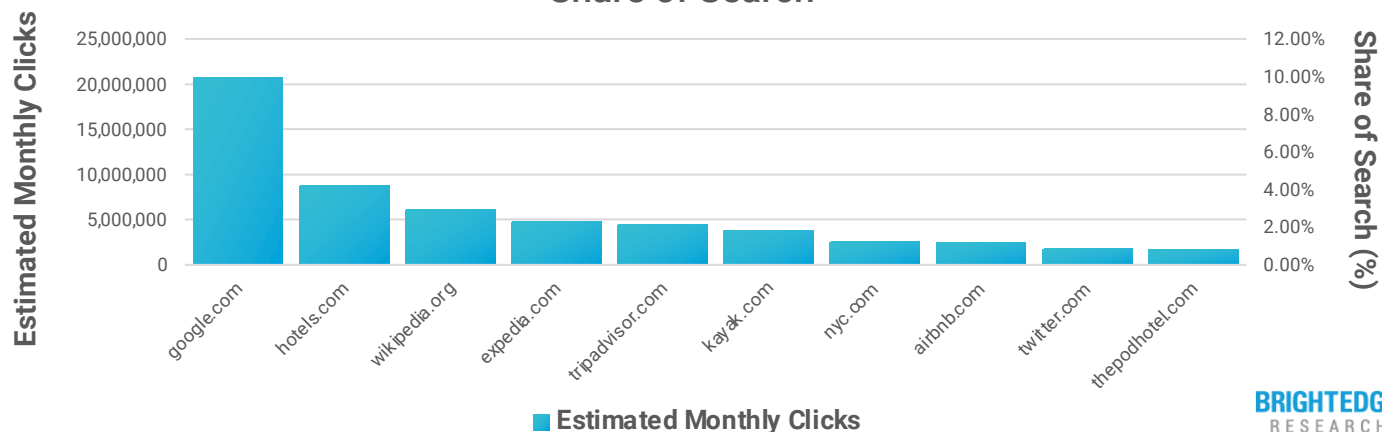
As Google has worked to provide more information-rich and interactive travel results through Google Flights (directly in the primary search engine results page) and [Google Travel](#), it's perhaps unsurprising that Google itself is the leading domain for travel authority. The graph titled "Authority Trends" shows an upward curve in share of search for Google, while all other leading domains have remained flat or declined, indicating that Google not only owns the largest share of search, but a growing one as well.

Wikipedia is the only other non-travel specific site ranking in the top ten. Six of the top ten are travel aggregation sites with just two domains, Marriott.com and AA.com belonging to individual brands. The dominance of travel commerce sites in the top ten suggests strongly that search interest aligns closely with purchase intent.

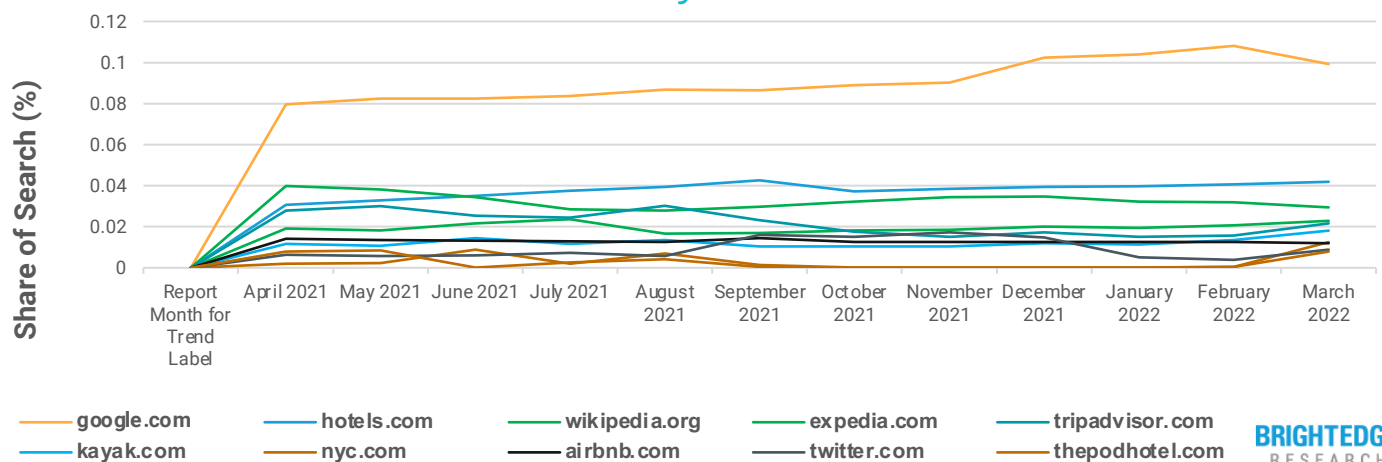
In the graph titled "Top Domains | Est. Monthly Clicks" we can start to understand the nature of search-originated traffic to the top domains. Contrast Hotels.com and Tripadvisor.com, for example. For Hotels.com, an overwhelming proportion of its traffic comes from a comparatively negligible number of keywords, rankings and pages. Somewhat inversely, Tripadvisor.com wins clicks from a much higher volume of rankings. This tells us something about the search engine's role in driving traffic. For Hotels.com, it's likely that visitors are mostly being referred to a handful of pages where they can originate a search for accommodations. Tripadvisor.com, on the other hand, requires search intent-matched content for a much wider range of searches to attract clicks (for example, a search for "Best hotels in Ojai, California" leads to this [#1-ranked page](#)).

Authority – Top Domains Estimated Monthly Clicks

Share of Search

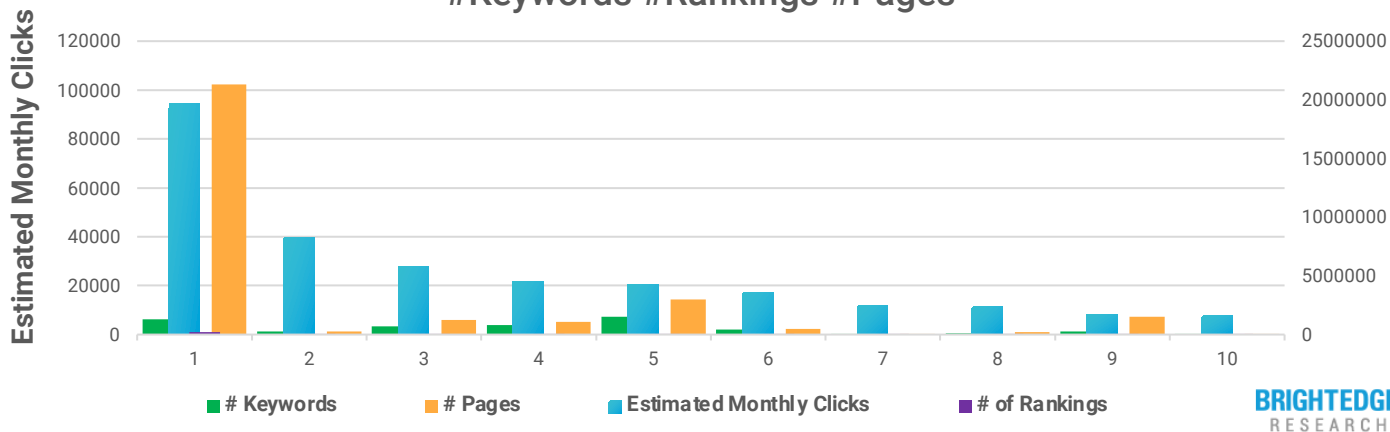


Authority Trends



Top Domains | Estimated Monthly Clicks

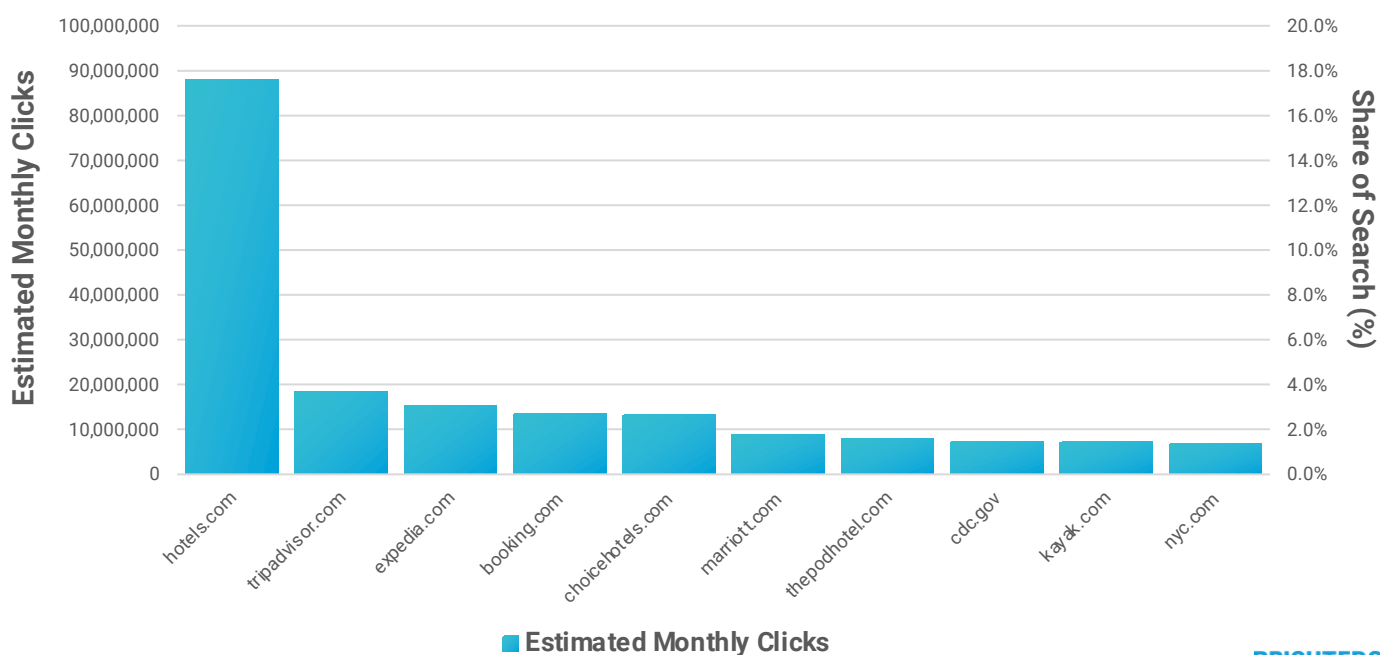
#Keywords #Rankings #Pages



Hotels

When narrowing our analysis to hotels, we see Hotels.com with a dominant grasp on search-originated traffic. Again here, the majority of top domains are commercial interests, suggesting high purchase intent in the searches and subsequent clicks. The presence of CDC.gov is a significant outlier suggesting that even as the travel economy recovers, questions and concerns around COVID protocols are still top of mind.

Authority Domains

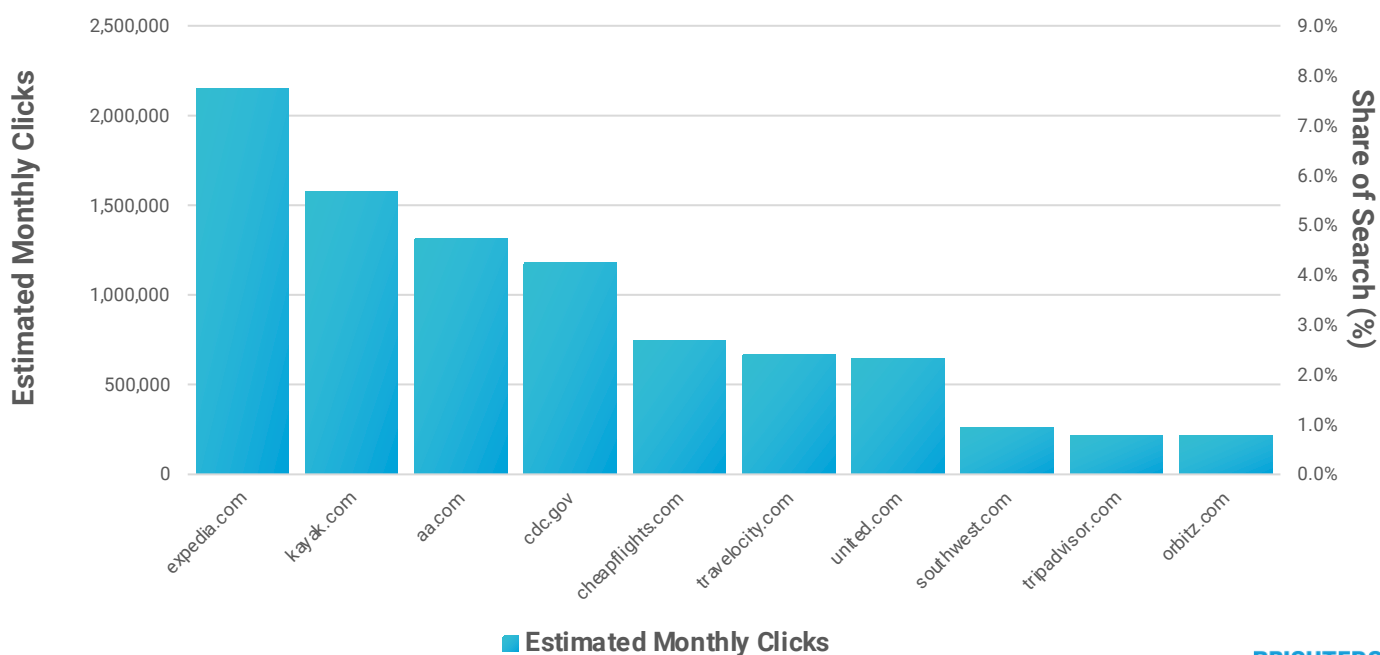


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Flights

The most-clicked airline domains in search are, in order, AA.com, United.com and Southwest.com.. In flight-related searches we see CDC.gov again and with a higher ranking, and outside of the three airline websites already mentioned, the remaining top domains are flight aggregators. Perhaps even more than the hotels segment, search around flights based on the top domains correlates highly with purchase intent.

Authority Domains

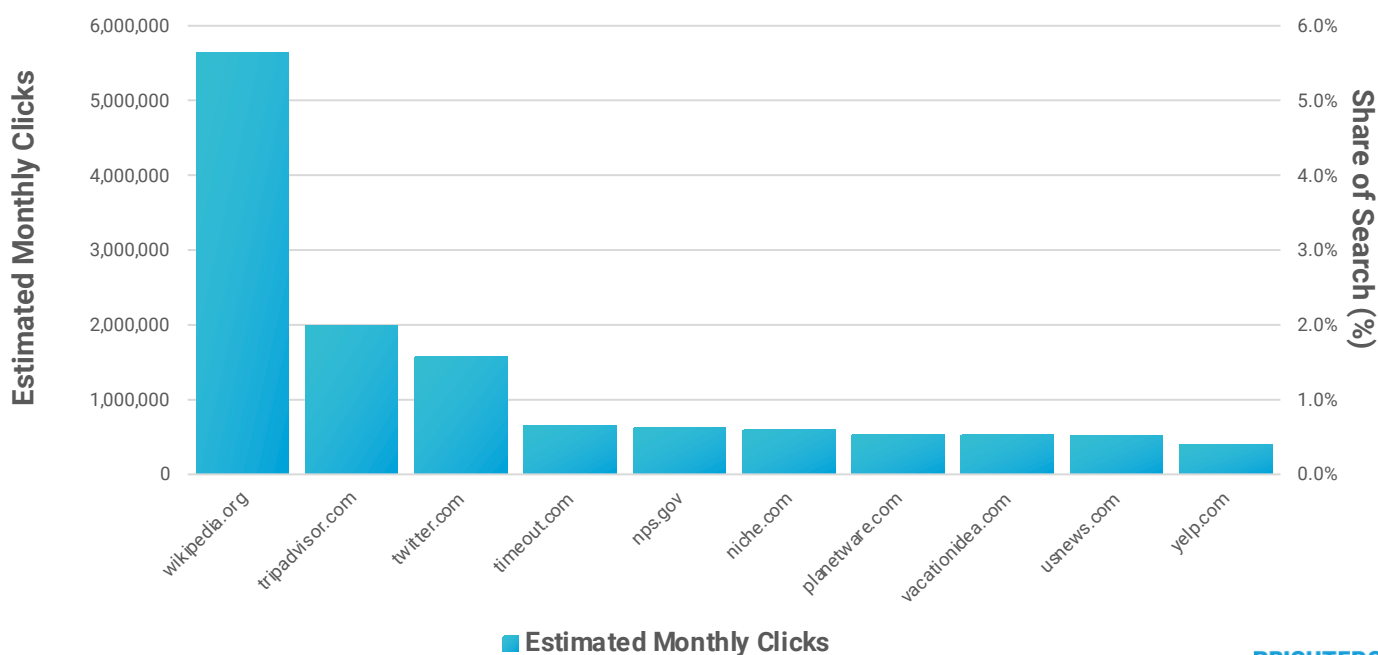


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Things to Do

Search around things to do is where things get a bit more interesting. Here, correlating search with purchase intent is harder to do. The nature of many of the leading domains – Wikipedia.com, NPS.gov (National Park Service), USNews.com, etc. – indicate that searches related to things to do are research-based. Engaging these domains, where possible, with advertising, sponsorships, and other forms of branded content may prove valuable for commercial travel brands seeking to capture prospective travelers.

Authority Domains



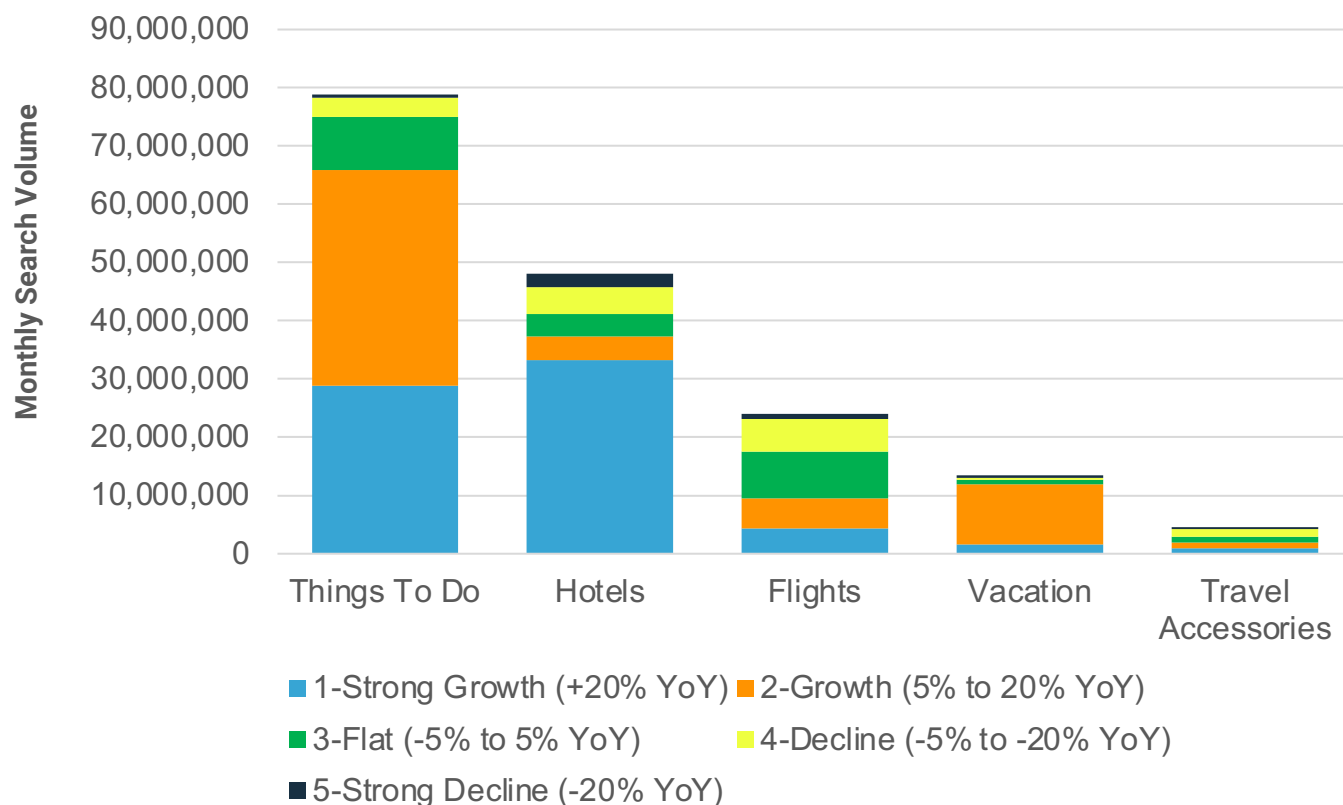
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Growth and Performance

Search volume only tells us part of the story of how interest is trending. The growth and performance of search in the hospitality segment helps to highlight the robustness of the trend. In the graph titled “Total Market | Summary by Growth,” what we see is the proportion of keyword searches in each sub-segment by growth rate over the past four years. In this instance, while a vast majority of keyword searches are flat or growing for things to do, and most searches for hotels are comprised of strong growth keywords, the inverse is nearly true for flights. This can be helpful insight for travel aggregators, for example, as they plan their offering and supporting content.

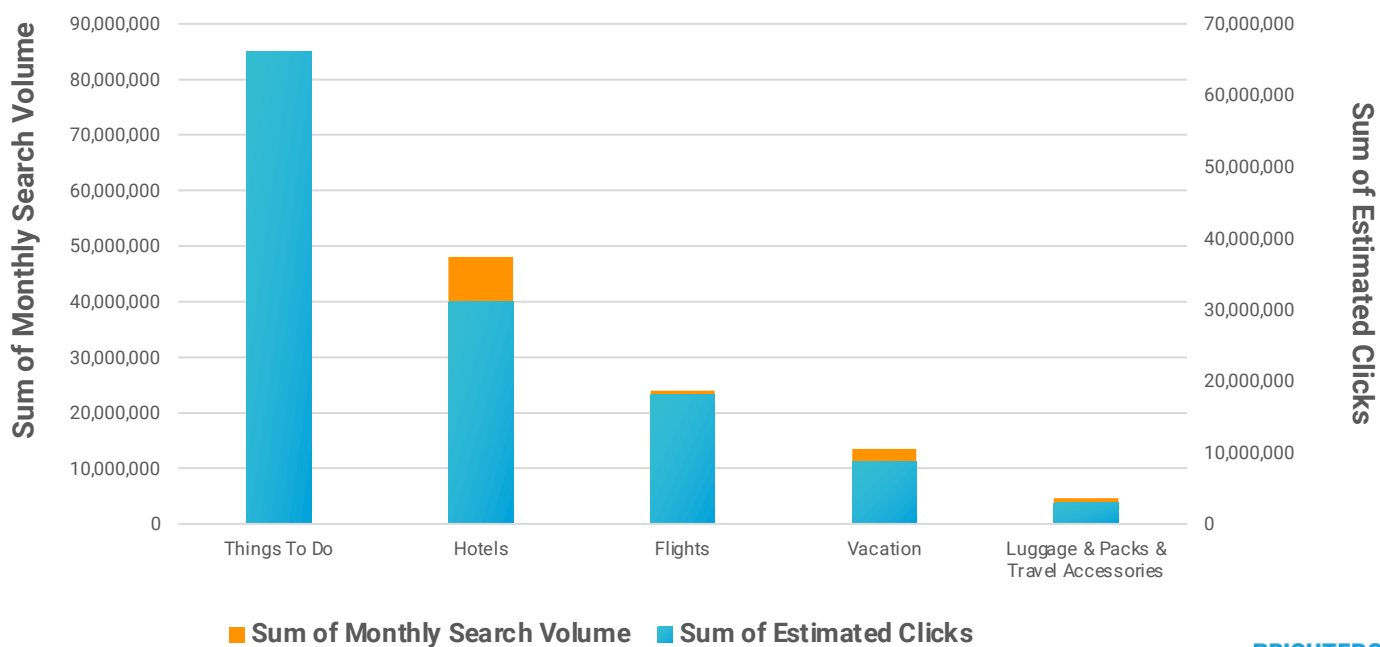
It is important to note here that search engines are a logical starting place for people looking for things to do. With flights, consumers likely begin their searches more often at aggregator or airline sites, though with the growth Google is seeing in authority, this may begin to change.

Total Market | Summary By Growth



That conclusion is supported here when we look at total market vs. performance. People searching for things to do are more likely to click on a link in the search engine results page and leave the search engine for another site. Comparatively, people searching for hotels, which they can do more directly in the search engine, leave the search engine at a lower proportion. Effectively, Google is giving them what they need without them having to visit another site, a fact that underlines the importance of securing one of the first few positions on the search engine results page.

Total Market vs Performance



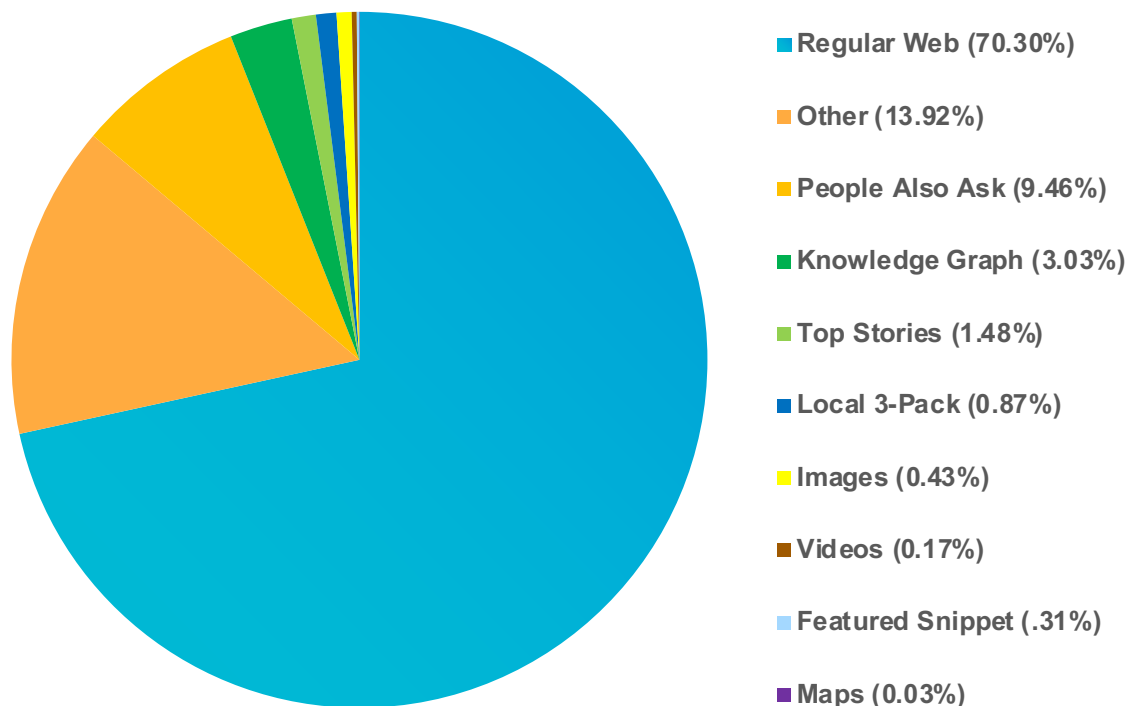
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Share of Search

We have explored the rate and volume at which people are searching and clicking on results. An additional important point of data is the types of results Google surfaces and people click on for related searches. The types of results people consume gives us an even better idea of the intent with their search. It is also helpful to content creators to better plan not only content topics, but content formats.

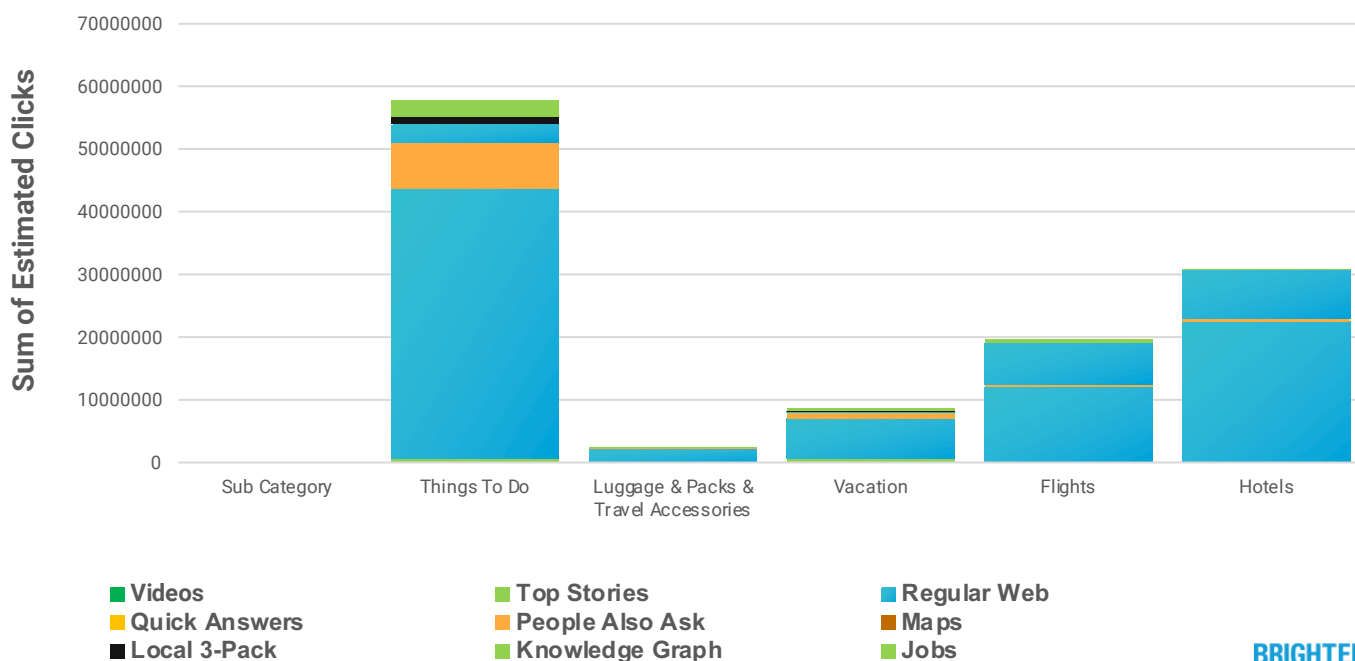
Regular web listings make up the majority of clicks, which is not unusual. What is potentially more interesting is that nearly 10% of clicks go to people-also-ask listings, which are largely zero-click results, meaning people don't have to leave the search engine results page to get the info they are seeking. The paucity of local-3-pack results is also not surprising, since searches are more likely to be keyed to non-local destinations.

Total Market | Share of Search



Drilling down a level, we can get a better idea of results and click distributions in each of the sub-segments. Not surprisingly, local-3-pack results make up a small, but proportionately greater percentage of “things to do” searches when compared to “hotels” and “flights” searches. The same holds true for people-also-ask searches.

Share of Search by Sub-Category



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Key Takeaways

The aim of this analysis is to offer a macro perspective on the travel and hospitality industry as informed by organic search. Here are a few key takeaways from the report:

- Overall, the market is rebounding from the pandemic downturn and had a strong start in 2022.
- Cautious optimism is the order of the day with interest trending upward, but external forces including the lingering risk of a virus surge, macroeconomic uncertainty and war serve as potential spoilers.
- Travel brands will need to monitor developments within their unique categories to know when, how, and how much they need to adapt. This, perhaps, is the most important takeaway.
- Organic search can tell us more than just what content to create and optimize. It can point to larger trends, opportunities and threats that can be used to inform marketing and operational strategy.

The type of analysis used here becomes vastly more informative when it is focused in a highly contextualized way on a specific business, brand or product. If you would like to better understand how you can use search data analysis to better understand your market opportunity, we invite you to **schedule a demo today**.

REQUEST A DEMO

Thank You



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