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2025 Edition: What’s Captifying the travel industry?

Featuring insights from:

fwd Born from lastminute.com

Our actionable insights will take your travel strategies to new heights

Captify's latest Travel Spotlight harnesses billions of intent-driven data signals, along with booking insights from our partners at **Forward**, the full-service integrated agency part of lastminute.com

In this spotlight, you'll discover:

+ Key traveller audiences and their evolving travel preferences
+ Ongoing behavioural shifts in the research to booking journey
+ Top destinations and the most searched for brands
+ Emerging trends set to reshape travel in 2026 and beyond

Data sources and partners:

captify
Real-time audiences and insights, fuelled by Search Intelligence

fwd / Born from lastminute.com
Travel booking data from Forward, the full-service integrated agency part of lastminute.com

A word from our partner

"Traveller demand is evolving fast. Turning intent into action means understanding the signals behind these shifts. Together, Captify's search intelligence and Forward's booking insights reveal where demand is rising - from the renewed appetite for long-haul adventures to cultural hotspots inspired by screen moments – empowering destinations and brands to stay ahead of the curve."

Giacomo Giuriani, Business Director at Forward

fwd / Born from lastminute.com

Travel booking data from Forward, the full-service integrated agency part of lastminute.com

Discover the top travel trends to turn lookers into bookers:

1. **Audience engagement opportunities:** Captify's key travel audiences, Aspiring Adventurers, Family Travellers, and Golden Globetrotters, account for a combined average of 90.4 million monthly searches.
2. **Travel Behaviour Splits by Distance:** Long-haul is considered and premium, while short-haul is spontaneous and dominated by aggregators.
3. **International travel on the rise**: Long-haul and exotic destinations take off as EU holiday interest declines.
4. **Trends influencing travel decisions:** Search data highlights a broader entertainment-led set-jetting trend, with The White Lotus Season 3 serving as a clear example of how popular culture can drive real travel intent
5. **2026 Trend to Watch:** Understanding DINKs & their cultural engagement

The 2025 state of play:
an aerial view of the travel landscape

captify

26%
Uplift in **overall travel searches***

14%
Uptick in overall **bookings****

29%
increase in consumer likelihood to choose foreign travel over domestic holidaying

17%
Increase in **short-term stays** *(0-7 days in duration)***

45%
Of trips are **up to a week long**, with 2+ week trips down by 16%**

*Data sourced from Captify's UK network: 01/10/24 - 30/09/25
**Data sourced from Forward, born from lastminute.com: September 2024 - September 2025

Tap into Captify's travel audiences

Captify's audiences are based on real-time consumer search signals. Throughout this spotlight, we dig deeper into the mindsets, motivators, and interests across the consumer journey so you can always have a finger on the pulse.

Aspiring Adventurers

36.4M+

Average monthly searches

Young, outgoing and adventurous travellers, seeking interesting and aspirational experiences.

Family Travellers

30.6M+

Average monthly searches

Family-focused holidaymakers, looking to minimise stress and maximise fun.

Golden Globetrotters

23.4M+

Average monthly searches

Older travellers with more freedom, seeking to unwind and explore.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Audience deep-dive

Aspiring Adventurers

Average monthly audience size
36.4 million

Peak conversion window*
August

Over-indexing destinations
America **1.38x,** Europe **1.06x**

Top US destination choices
Los Angeles, Boston, New York

Holiday type preference

Road Trip **3.17x**

Cultural Trip **2.64x**

Adventure Holiday **1.40x**

Top searched for brands

Airlines	Hotels	Aggregators
01 easyJet	01 Hilton	01 airbnb
02 Jet2	02 IHG HOTELS & RESORTS	02 KAYAK
03 BRITISH AIRWAYS	03 MARRIOTT	03 trivago

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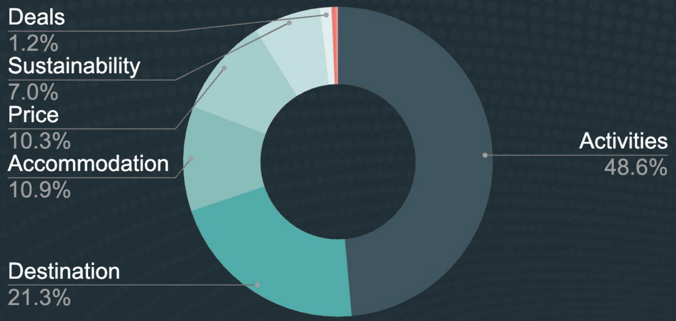
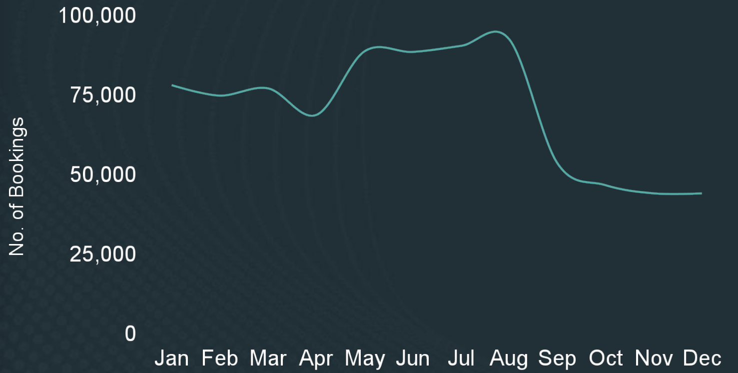
Top holiday considerations



Booking Behaviour*



Data sourced from Captify's UK network (01/01/25 - 30/09/25),
*Forward, born from lastminute.com (01/10/24 - 30/09/25)

Audience deep-dive

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Family Travellers

Average monthly audience size
30.6 million

Peak conversion window*
July

Over-indexing destinations
Europe **1.21x**

Top European destination choices
Edinburgh, Rome, Paris

Holiday type preference

Beach Holiday **2.58x**

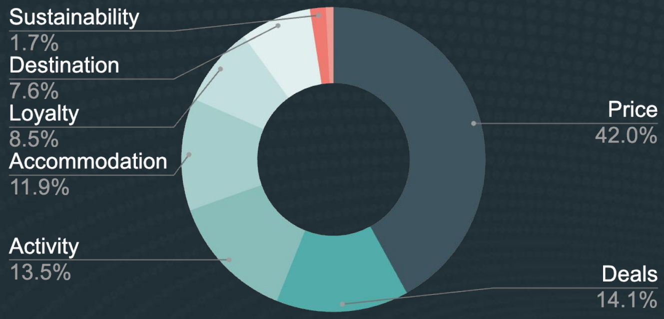
Adventure Holiday **2.30x**

Luxury Retreats **1.73x**

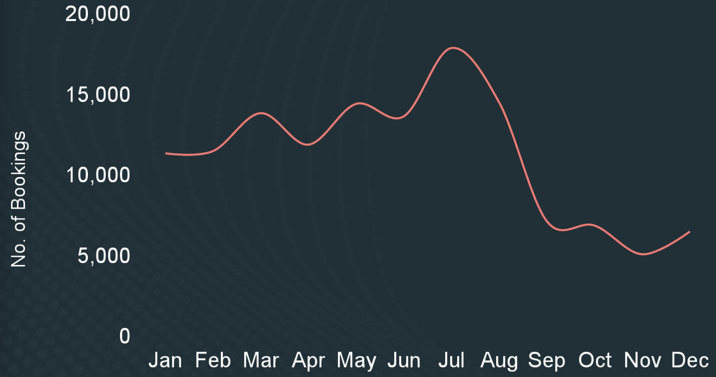
Top searched for brands

Airlines	Hotels	Aggregators
01 easyJet	01 Hilton	01 KAYAK
02 British Airways	02 Marriott	02 trivago
03 Jet2	03 IHG Hotels & Resorts	03 lastminute.com

Top holiday considerations



Booking Behaviour*



Data sourced from Captify's UK network (01/01/25 - 30/09/25),
*Forward, born from lastminute.com (01/10/24 - 30/09/25)

Audience deep-dive

Golden Globetrotters

Average monthly audience size
23.4 million

Peak conversion window*
July

Over-indexing destinations
America **1.44x,** Asia **1.37x**

Top US destination choices
Los Angeles, Boston, New York

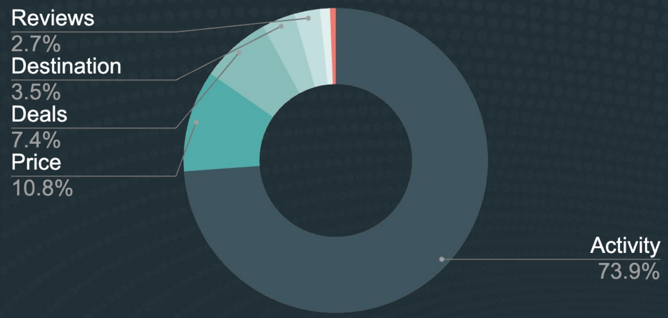
Holiday type preference

Beach Holiday **2.29x**
Luxury **1.65x**
Eco Tourism **1.29x**

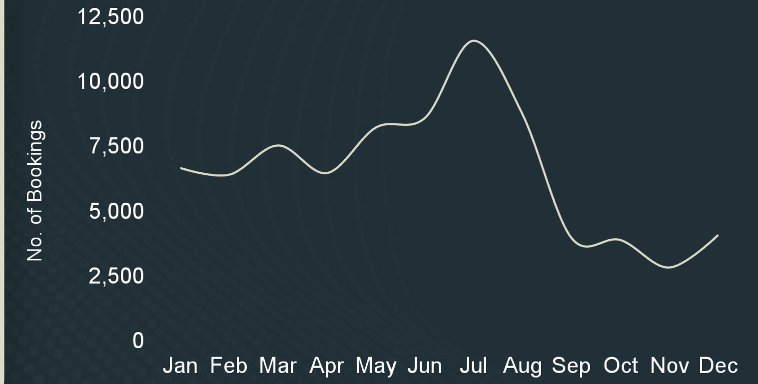
Top searched for brands

	Airlines	Hotels	Aggregators
01	British Airways	Hilton	Booking.com
02	easyJet	IHG Hotels & Resorts	lastminute.com
03	Emirates	Holiday Inn	trivago

Top holiday considerations



Booking Behaviour*



Data sourced from Captify's UK network (01/01/25 - 30/09/25),
*Forward, born from lastminute.com (01/10/24 - 30/09/25)

The Intent Gap

How Search Predicts Travel Bookings

Insight: Search Trend

Combined insights from Captify search data and Forward, born from lastminute.com booking data reveal three clear seasonal patterns in traveller behaviour:

Q1 – A Balance of Interest & Action:
Travellers chase winter sun and plan the year ahead, with trigger moments around Blue Monday and New Year.

Summer Period – High Bookings, Low Search:
High bookings, low searches. People are away, converting earlier plans into travel.

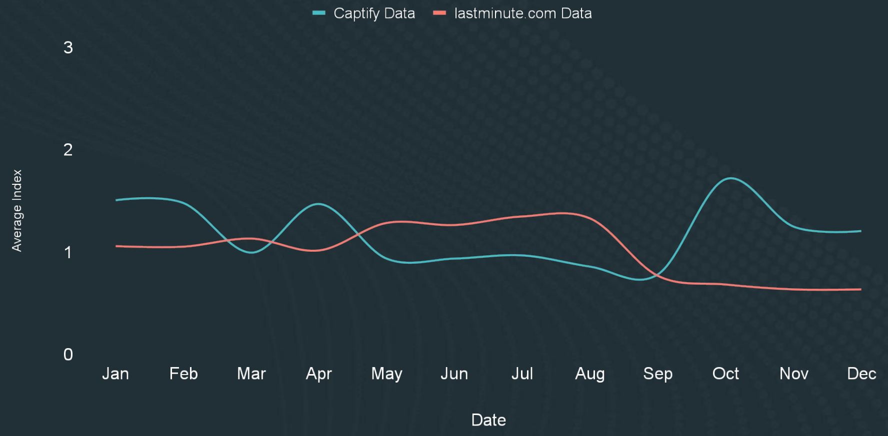
Q4 – The Planning Window:
High searches, low bookings. Travellers are researching deals and planning ahead as temperatures drop across the Autumn months.

Overall, searches are up 26% and bookings up 14% YoY, highlighting strong travel intent & conversion, with an opportunity for advertisers to capture this growth through marketing that reaches travellers from inspiration to booking.

From insight to action

Activate short, high-impact campaigns around key moments to capture high-intent planners, while maintaining an always-on presence through spring and summer to build awareness and drive conversion as searches turn into bookings.

Understanding how travel search interest compares to booking data: Captify vs Last Minute



Key emerging trend to watch

Forward, born from lastminute.com's data shows consistent accelerating year-on-year growth across 2025, rising from +11% in January to +52% by August. This upward trajectory reinforces growing consumer confidence and an expanding appetite for travel throughout the year; intent which savvy brands should look to capitalise on.

Data sourced from Captify's UK network
*Forward, born from lastminute.com (01/10/24 - 30/09/25)

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Insight: Search Trend

From Local Escapes to Global Adventures

Timing Travel Intent for Maximum Impact

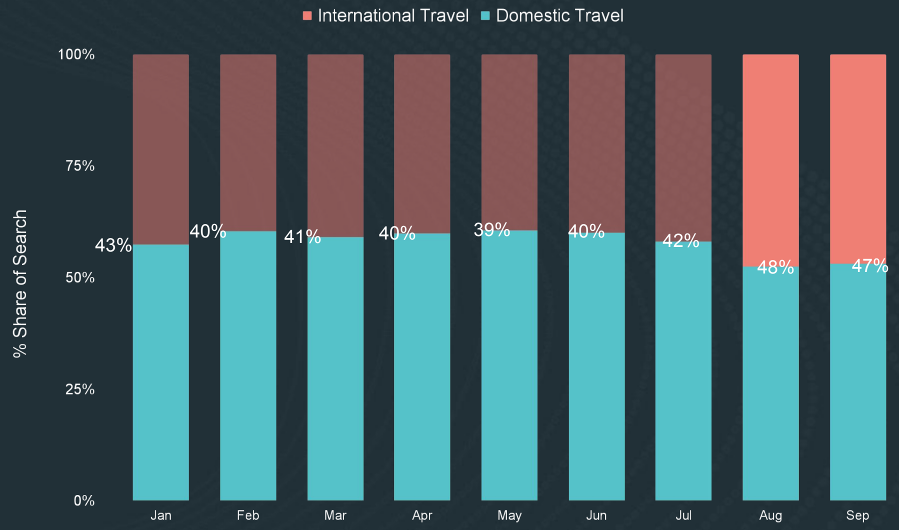
Domestic travel remained popular across the first half of 2025, reflecting a value-conscious mindset as travellers seek shorter, local breaks, particularly around Easter. This aligns with a period of steady but modest booking activity seen in earlier data.

However, international interest accelerated sharply from summer into Q4, **climbing +13% proportionally by September**. This late-year surge mirrors the broader Q4 spike in travel searches, suggesting a strong appetite to plan bigger overseas trips as consumers regain financial stability and look ahead to 2026 travel.

From insight to action

Tailor messaging by travel timing: promote local, value-focused trips early in the year, then pivot to international, premium experiences from summer onwards.
Dynamically adapt creatives via Captify's studio team to reflect emerging search trends, ensuring the right message reaches the right travellers at the right time.

Search Trend: domestic vs international holiday interest



Data sourced from Captify's UK network: 01/01/24 - 30/09/25

Long-haul and exotic destinations take off as EU holiday interest declines

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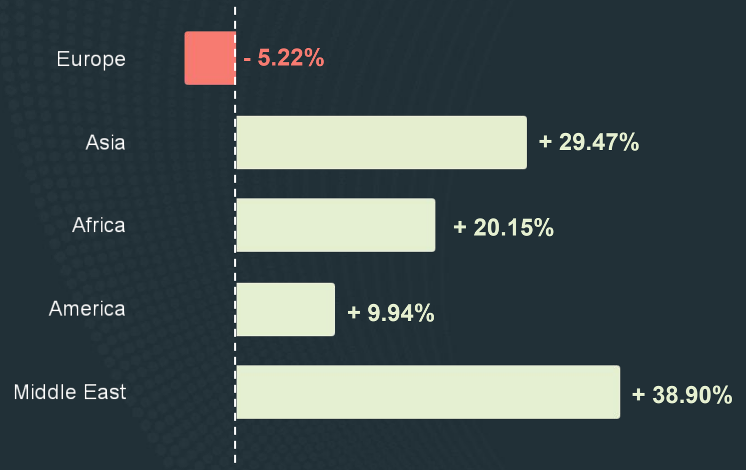
Insight: Top Destinations

YoY change in destination bookings



People are choosing destinations centered on experiential travel, accelerated by viral trends like Dubai's chocolate experiences, Japan's cherry blossom season and Morocco's vibrant cultural festivals– all of which offer 'Instagrammable moments'.

Leading Destinations: YOY Change in Volume

Winners

Japan **+67.1%**	Abu Dhabi **+41.7%**	Malta **+40.6%**	Dubai **+39.1%**
Qatar **+38.8%**	Poland **+35.6%**	Norway **+35.2%**	Tunisia **+35.1%**
Thailand **+19.6%**	Morocco **+17.2%**	Singapore **+8.4%**	Maldives **1.4%**

Losers

Spain **-0.1%**	Iceland **-0.3%**	Germany **-7.5%**	Ireland **-70.8%**

Key emerging trend to watch

Audience analysis of 2025's biggest winner, Japan, shows some travellers are looking for more than just a bit of R&R…

Japan Traveller Index vs Captify Baseline

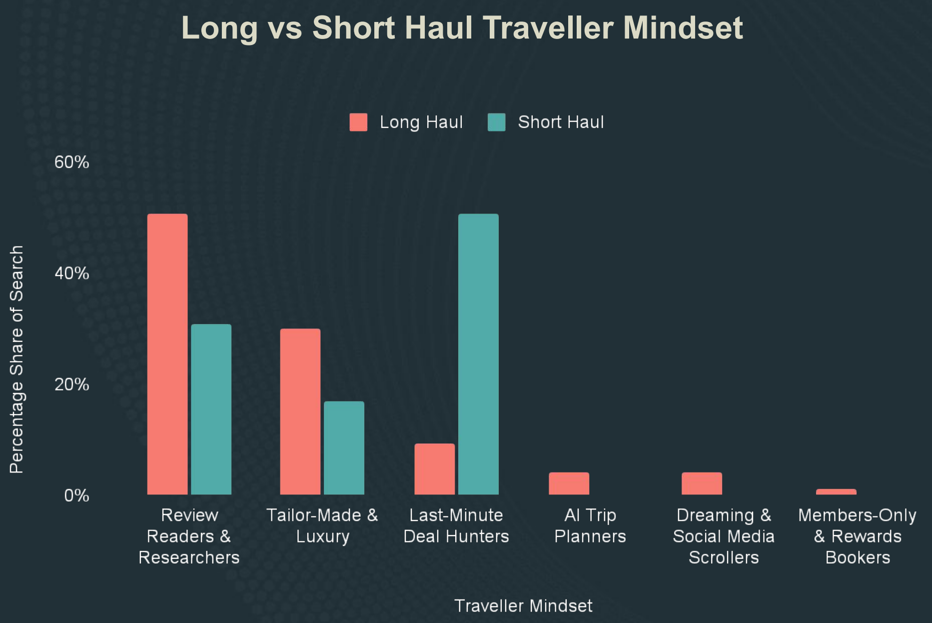
Cuisine	Experiences	Technology
3.1x	2.6x	2.4x

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Mapping the Travel Mindset

Long-Haul Planners vs. Short-Haul Bookers

Insight: Booking Behaviour



Aligning with the most considered approach needed for a long-haul trip, Review Readers & Researchers (51%) and Tailor-Made & Luxury travellers (30%), index the highest when it comes to search activity.

These travellers are typically booking premium or complex itineraries, often multi-destination or multi-hotel trips that require detailed research, trusted reviews, and expert guidance.

In contrast, short-haul travel is dominated by Last-Minute Deal Hunters (51%), signalling a spontaneous, price-sensitive mindset. These travellers are driven by convenience and value, often booking through aggregator sites like Forward, born from lastminute.com or Booking.com, with minimal pre-planning.

For long-haul travel, focus on planning support, expert content, detailed guides, and reassurance messaging.

Short-haul travel, focus on real-time activation, offers, discounts, and in-the-moment messaging to capture spontaneous intent.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Unlock Intent Across Every Travel Mindset Using Interactive Video Canvas

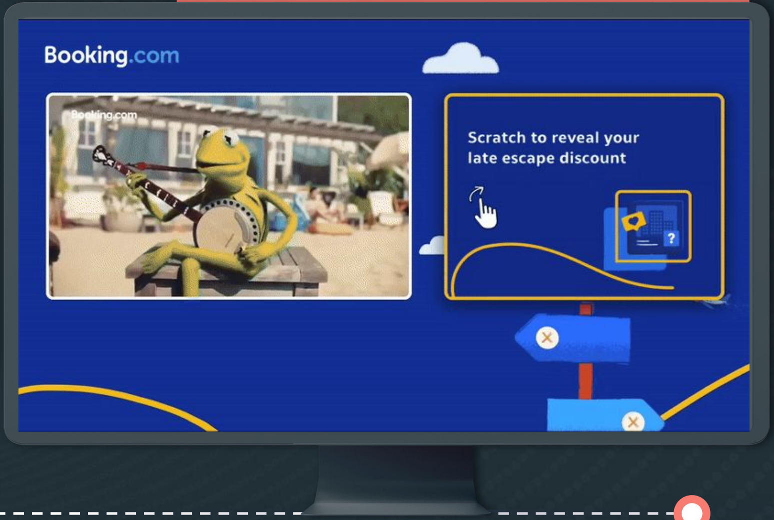
Turn insights into action using creative features housed within a Video Canvas. Inspire trusted planning for long-haul travelers and real-time offers for spontaneous short-haul.

Deck of Cards

Retain attention with interactive cards that drive destination **discovery** and **advance bookings** for **long-haul travelers.**

Interactive Wipe

Use an engaging wipe function that unveils last minute hotel offers for **short-haul travellers** looking for **discounts.**



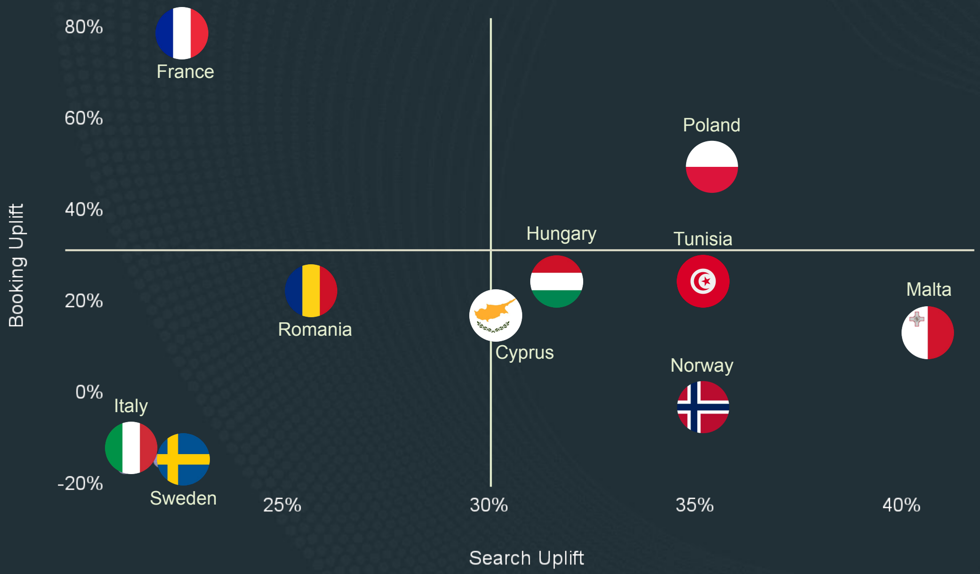
Long-haul

Short-haul

From Curiosity to Conversion
Turning Search into Bookings

Insight: Booking Behaviour

Search Intent vs Booking Conversion*
Destination Performance (YoY % Change)



This chart highlights year-on-year growth in travel interest (search uplift) versus actual bookings (booking uplift).

Poland and Tunisia lead the way, converting strong increases in search demand into solid booking growth.

France stands out with exceptional booking growth despite modest search uplift, suggesting strong brand familiarity and repeat visitation.

Malta, Hungary, and Cyprus show balanced growth across both metrics, reflecting healthy, sustainable momentum. **Norway** attracts rising interest which hasn't yet converted into tangible travel - a destination to watch for the future.

Meanwhile, **Italy** and **Sweden** see steady search activity but negative booking growth, suggesting stable awareness and interest, without new demand.

From insight to action

High Growth Search Destinations

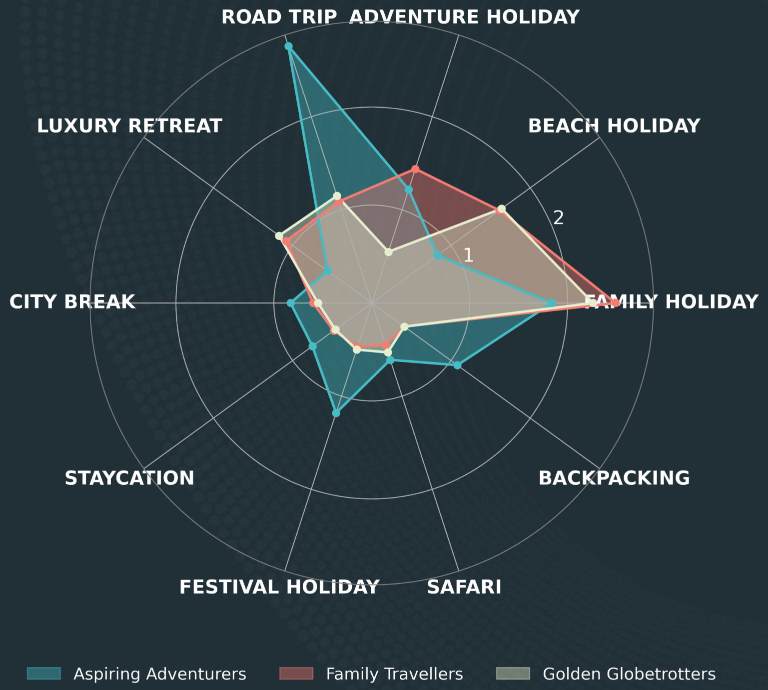
Prioritise opportunities that align in growth in both intent and bookings. In countries with strong interest but weak conversion, focus on targeted, benefit-led offers and simplified booking journeys to help close the gap.

Data sourced from Captify's UK network and
*Forward, born from lastminute.com (01/10/24 - 30/09/25)

Travellers are proving you can't beat a classic road trip

Insight: Holiday Preferences

Holiday Preferences by Audience



Most searched for holiday destinations type:

Beach Holiday	Road Trips	Luxury Retreat
1. Morocco	1. Morocco	1. Türkiye
2. France	2. USA	2. Italy
3. Spain	3. Germany	3. France

Adventure Holiday	Festival	City Break
1. Italy	1. Morocco	1. Italy
2. Morocco	2. France	2. Spain
3. Portugal	3. USA	3. France

From insight to action

Aspiring Adventures: Inspire with experiential travel, road trips, festivals, and backpacking adventures that deliver shareable moments.

Families: Highlight premium beach escapes and child-friendly luxury options that balance comfort with convenience.

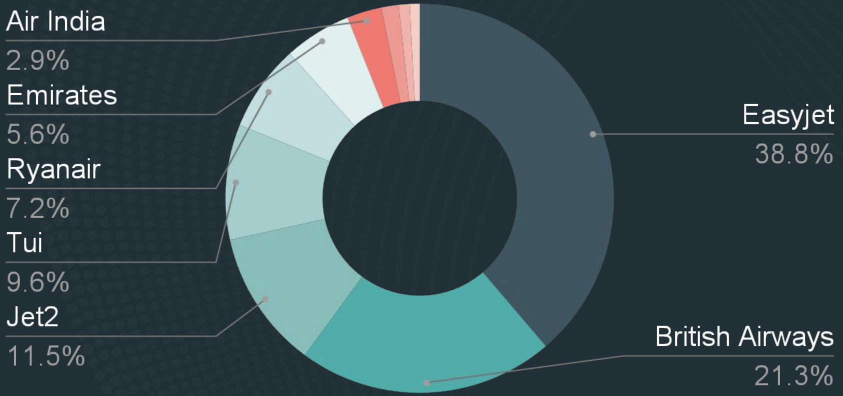
Golden Globetrotters: Emphasise luxury and exclusivity blended with soft adventure and authentic local experiences.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Evolving Travel Trends Across Flights and Accommodation

Low-Cost Carriers and Trusted Brands Dominate

Insight: Share of Search



*Virgin Atlantic, Qatar & KIM make up the remainder of the Top 10 at 1.44%, 0.91%, and 0.83% of search respectively.

Top searched for hotel chains

Holiday Inn
Hilton
Marriott
IHG Hotels & Resorts
Radisson Hotels

Top searched for aggregators

airbnb
Skyscanner
KAYAK
trivago
Tripadvisor

Key emerging trend to watch

EasyJet has jumped from 16% to 38.8% of flight searches year-on-year, overtaking British Airways (now 21.3%) and signalling a clear shift toward affordable, flexible travel. Jet2 is the only other airline showing YoY growth (4 percentage points), reinforcing its strength with family and package travellers. In the accommodation space, Hilton, Marriott, and Airbnb sit firmly at the top of the pile, while aggregators like Skyscanner and TripAdvisor continue to shape traveller decision-making.

From insight to action

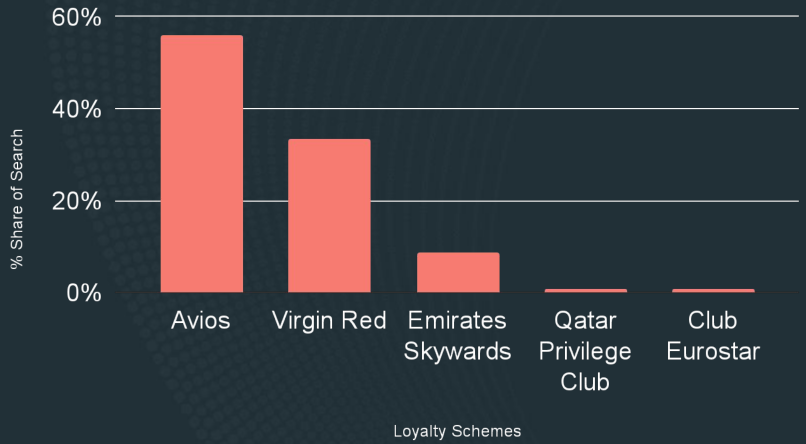
Reposition messaging: Emphasise value and convenience to compete with EasyJet's growing dominance.
Differentiate premium brands: Reinforce British Airways' reliability, service, and comfort to protect share among brand-loyal travellers.
Leverage family travel growth: Focus on bundle offers and all-inclusive packages for family-friendly brands like Jet2, TUI, and major hotel chains.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Avios Dominance: Upgrades Drive Top Loyalty Schemes

Insight: Share of Search

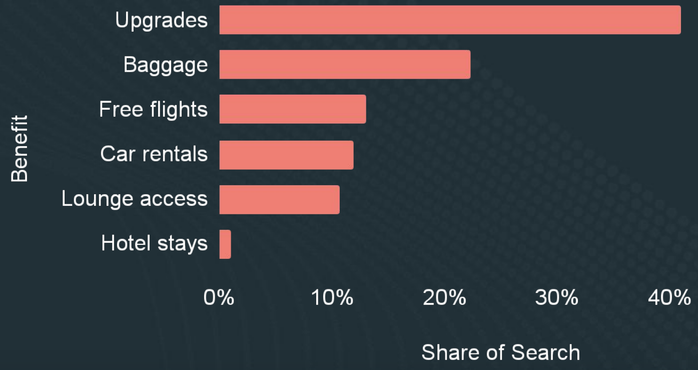
Top searched for travel loyalty schemes



Avios dominates search share for travel loyalty schemes in 2024, capturing **56%** of total searches.

While this underscores the dominance of the scheme for many travellers, Virgin Red also holds a significant share of search interest at **34%**, outpacing rival programmes like Emirates Skywards, Qatar Privilege Club and Club Eurostar.

Share of search: loyalty scheme benefit preferences



From insight to action

Brands should realign loyalty messaging to prioritise benefits consumers search for most.

The top three consumer priorities are Upgrades (41%), Baggage allowances (22%), and Free flights (13%).

Focus messaging on these key perks to boost engagement. Additionally, invest in user-friendly features and strategic partnerships to deliver seamless, rewarding experiences.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Utilise Dynamic Creative That Rewards Attention and Inspires Personalised Loyalty Schemes.

This dynamic creative optimises messaging using real-time search data, aligning with each audience's top holiday considerations and linking to loyalty schemes to boost conversions.

Capture maximum attention with a mobile skin - an immersive, full-screen overlay that lets users scroll seamlessly through content.

Family Travellers

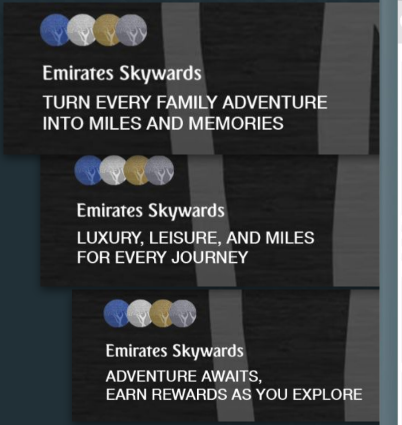
Target family holiday-makers with rewards focused on **deals**.

Global Globetrotters

Offer older travellers **leisurely** travel whilst **earning miles** that suits their **freedom**.

Aspiring Adventurers

Inspire **adventure** and rewards for young travellers, appealing to their interest in **activities.**



Performance

Mobile Skin drives an Engagement Rate of 0.55%

Messaging focuses on top consumer priorities such as **Upgrades** (41%), **Baggage allowances** (22%), to boost engagement.

See Specs

Scan me

Captify's Blueprint: Turning TV-Driven Set-Jetting Searches into Bookable Travel Experiences

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Insight: Search Trend

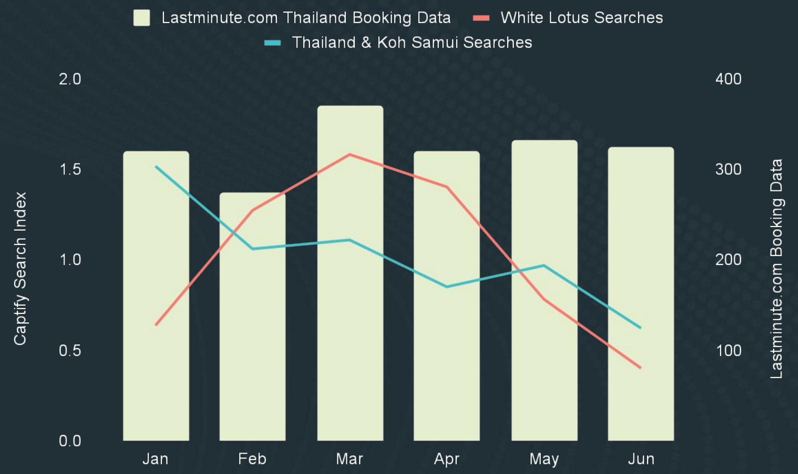
Search data shows a direct link between screen inspiration and travel intent, highlighting the growing **set-jetting trend**, with audiences visiting destinations featured on their screens. This year, The White Lotus Season 3 triggered simultaneous spikes in show searches, Thailand and Koh Samui interest, and confirmed bookings - all peaking in March.

The show also drew in luxury audiences, with **searches for Four Seasons hotels rising 27%** in Q2 vs Q1, underscoring its high-end influence.

Supporting this trend, The Guardian reported a 93% surge in Airbnb bookings to Italy's Atrani area after Netflix's Ripley, with Captify also seeing strong search growth for Atrani and the Amalfi Coast.

Together, these examples confirm that set-jetting doesn't just inspire, it converts, turning entertainment moments into measurable travel demand.

Search Trend: White Lotus vs Thailand & Koh Samui Searches



From insight to action

By utilising Captify's real time search intelligence, connect media moments to travel decisions, engage viewers through CTV and video as set-jetting drives intent.

Key emerging trend to watch

Screen inspired travel is evolving into high value, luxury bookings

Four Seasons searches increase Q2 vs Q1

27%

FOUR SEASONS

Data sourced from Captify's UK network,
Forward, born from lastminute.com (01/10/24 - 30/09/25)

The White Lotus Successfully Captures the Aspirational Luxury Traveler

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Insight: Audience Analysis

Audience analysis reveals how The White Lotus perfectly aligned fictional narrative with reality, attracting the type of viewers both keen and capable of emulating its lifestyle.

This audience is highly predisposed to buy: top segments include in-market Hotels & Accommodations intent (2.18X), driven by affluent, free-spending DINKS (1.46X) and aspirational Young Professionals (1.40X).

The 1.63X index for the Thrill Seekers audience confirms viewers are not just passive observers; they are actively seeking experiences that luxury settings shown across TV provide. This profile demonstrates an opportunity for experiential marketing that blends aspiration, intrigue, and adventure.

From insight to action

For high-end and travel brands, target the identified DINK/Thrill Seeker audience by linking their aspirations for luxury goods and experiences directly to the show's narrative. Captify enables this by creating precise audiences based on real-time search intent, converting cultural interest into high-value purchase action.

The 'White Lotus' Audience	
Hotels & Accommodations	2.18X
Thrill Seeker	1.63X
DINKs (Dual Income No Kids)	1.46X
Young Professional	1.40X
TV - Streaming	1.40X
Luxury Goods	1.33X
Holiday / Vacation & Tour Packages	1.26X

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

Turn On-Screen Inspiration Into Travel Intent using Search Powered CTV+

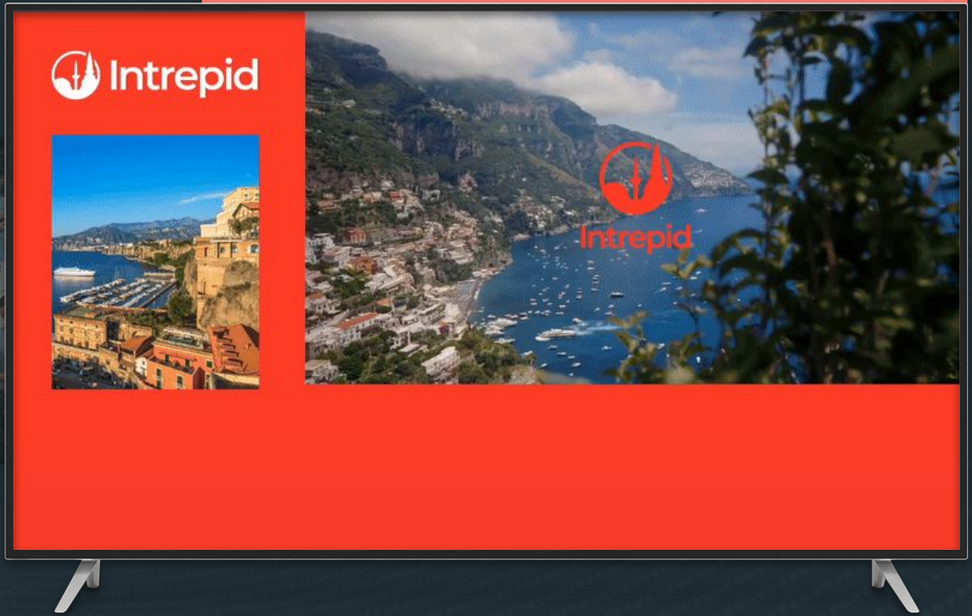
Use the White Lotus search trend to tap into audience mindsets whilst they're already engaged in destinations featured on their screens.

Maximise your existing TV asset's impact with a QR code, keeping viewers engaged beyond the runtime of a standard TV spot. CTV+ enhances your video asset and drive conversions by implementing animations.

Stay ahead of the trend by engaging **DINKs** and **Thrill Seekers** with CTV+ ads that seamlessly tie premium travel experiences into the TV show's storyline. Intrepid Travel can inspire audiences based on the travel destinations shown.

Case Study

Users who were exposed to custom high-impact creative via CTV were **2.37x** more likely to search for the brand



[See Studio Creatives]

2026 Trend to Watch: Understanding DINKs & their Cultural Engagement

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Insight: Audience Analysis

DINKs - Who are they? (Dual Income No Kids)	
Young Professional	1.98X
Homeowner	1.66X
Fitness Enthusiast	1.50X
Musician	1.49X
City Dweller	1.25X
Financial Services - Mortgages	2.03X
Gym Workouts	1.84X
Specialty Travel	1.60X
Partying	1.57X
Financial Planning	1.41X

DINKs Cultural Moments

Anniversary	Tennis (US Open)	Film Festivals (Cannes Film)	Superbowl	Valentines Day	Music Festivals (Coachella)
1.49X	1.59X	1.95X	2.14X	2.17X	2.27X

DINKs, defined by spending power and a carefree lifestyle, show strong engagement across cultural and sporting moments that inspire experience-led travel.

Audiences like Young Professionals (1.98x), Homeowners (1.66x), and Specialty Travellers (1.60x) makeup this audience, and cultural spikes such as Music Festivals (2.27x), Valentine's Day (2.17x), and major sports events like the Super Bowl (2.14x) and US Open (1.59x) reveal key intent moments.

Together, these behaviours show how DINKs use cultural events as cues to plan travel, explore new destinations, and invest in lifestyle experiences.

From insight to action

As we look ahead to the 2026 World Cup across the USA, Mexico, and Canada, brands have a clear opportunity to tap into this intent-rich audience. Partnering with Captify ensures brands are positioned to capture high-value consumers at the intersection of sport, culture, and travel planning.

Data sourced from Captify's UK network: 01/01/25 - 30/09/25

About Captify

As the largest holder of onsite search data outside the walled gardens, Captify is the leader in real-time audiences and insights, fueled by Search Intelligence. Captify's solutions power pre-campaign strategy, programmatic activation, and unique measurement for the world's biggest brands.

Connecting searches from over 3 million websites globally, Captify helps brands understand consumer interests, motivations and mindsets. Search behaviour provides a view into consumer intent, which is then made actionable through machine learning technology. Search Intelligence fuels flexible, omnichannel solutions, to bring brands new, real-time audiences, publishers greater yield and consumers the most relevant digital experiences.

www.captifytechnologies.com

Want to find out more?

Get in touch with **sales@captify.co.uk**