IPSOS iris

TRAVEL CATEGORY REPORT

April 2025

Australia's digital audience measurement currency endorsed by IAB Australia

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Ipsos

Ipsos iris launched in Australia in January 2023. It is the IAB Australia endorsed digital measurement system delivering accurate audience measurement and competitive insights for Australia's leading digital publishers and global platforms.

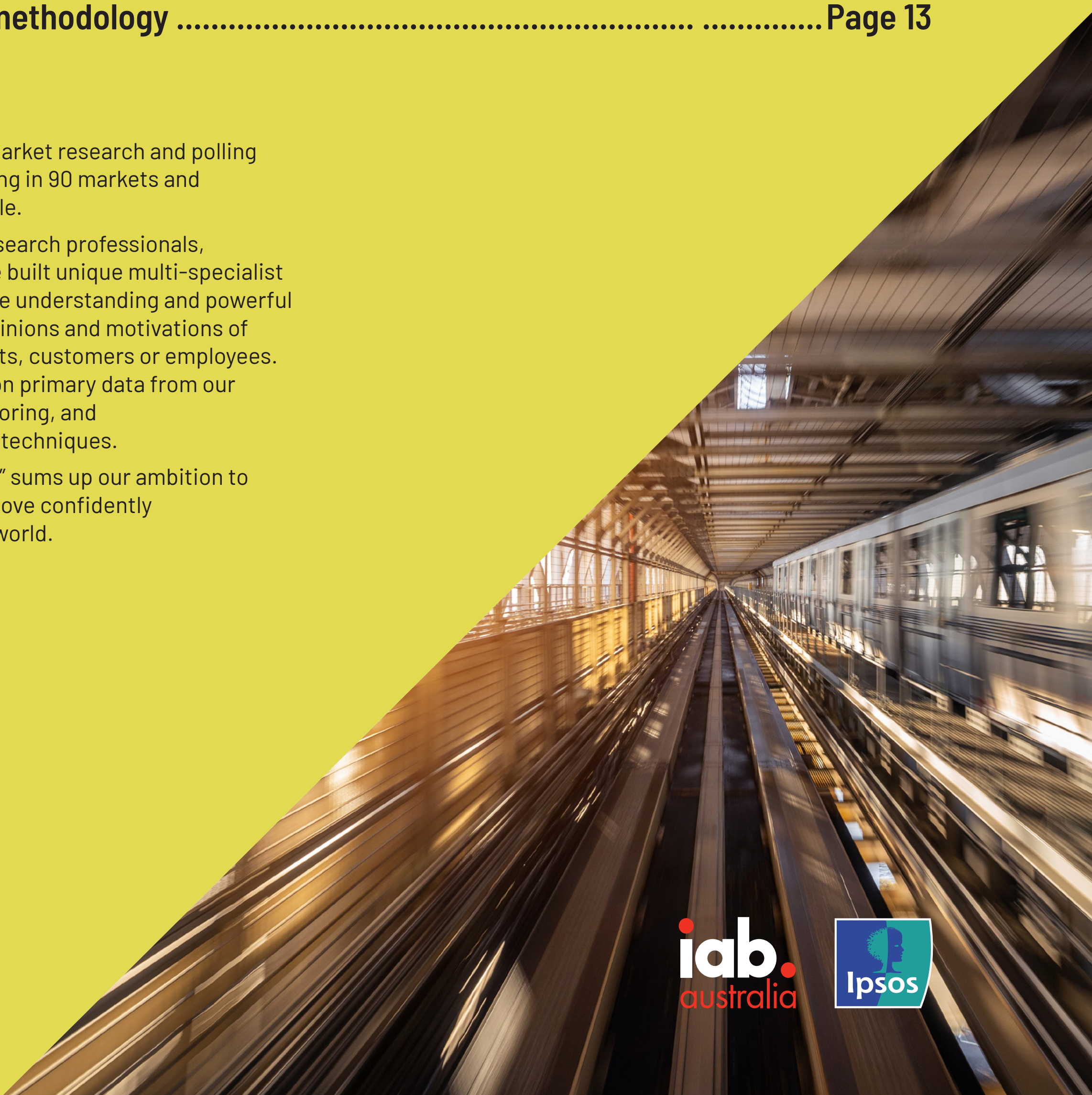
Report Content Summary

About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.



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Australians' digital behaviour points to a year of growth in travel category

Real world travel data and digital behavioural data both point to a year of robust growth in Australians travelling overseas and domestically.

According to The Department of Home Affairs international departures by air and sea grew by 10% in the year to November 2024.[1]

Digital behaviour signals point to the continuation of this trend. Airline web and app digital audiences are up 12% YOY and Australians have doubled the time they are spending on Tourism information websites.

The total digital travel category audience has increased by over 7% compared to December 2023. While inbound tourism is enjoying robust growth with total overseas arrivals into Australia increasing by over 8% from 1.7M during December 2023 to 1.84M in December 2024.[2]

The introduction of new rail services and the gradual return to office-based working has increased the digital audiences of Rail and Train websites and apps (up 31% YOY) and automotive travel websites and apps similarly grew (up 17% YOY).

What can the online behavior of Australians tell us?

In these tough economic times, the travel sector can take many learnings from Ipsos iris. It can provide the sector with a holistic view of where Australians are going for travel support and information, what apps / sites they consume and how engaged they are, who is more likely to be engaged, YOY and monthly trends, cross consumption (second choice and targeting) and rich competitive insights that can be used to drive better outcomes for Australians seeking travel support and guidance, and finding your brand's unique selling points

What you can expect to see in this report

This category report will deep dive into the usage, behaviours and profiles of Australians' digital travel activity across a wide range of travel sites and sub-categories and brands, with a focus on selected sub-categories including Airline, Accommodation, Cruise, Rail and Tourist information , for both websites and apps.

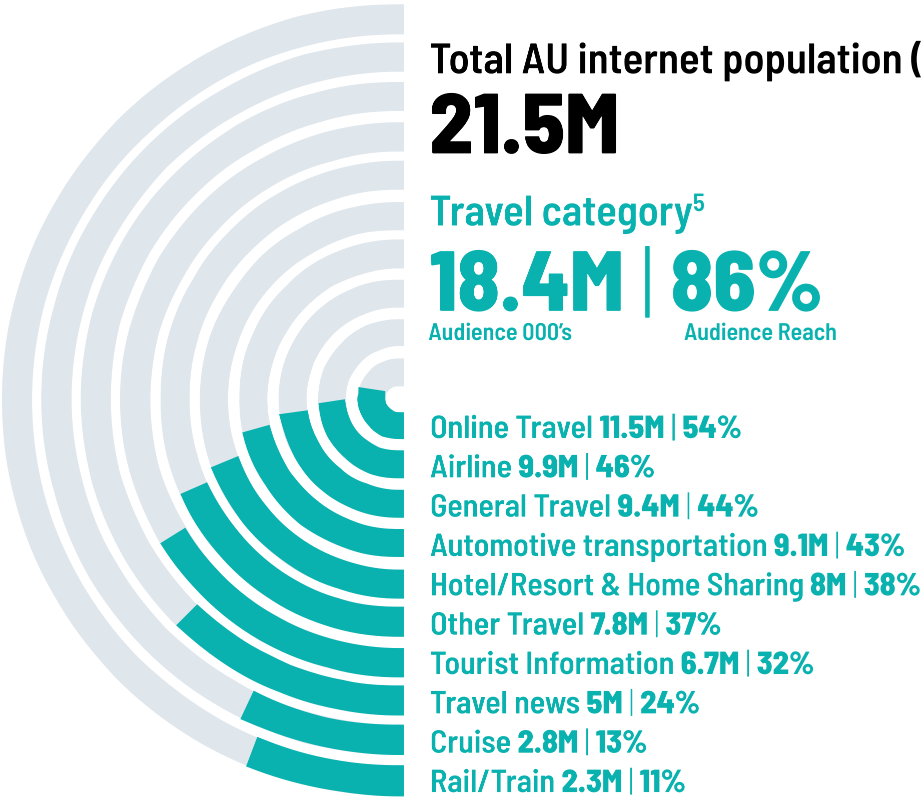
Travel category - State of play

From Dec'23 to Dec'24 Australians spent a total of $75.5bn on Travel compared to $71.6bn the year before[3]

Before exploring the report's detailed findings, it's essential to establish a baseline understanding of the current online travel category and its associated sub-categories, specifically in terms of online audience usage and engagement.

Ipsos iris tells us that 86% (18.4M) of all online Australians age 14+ access Travel websites or apps.

The largest audience subcategories are Online Travel with 54% reach or 11M Australians Age 14+, (Booking.com, Expedia, Skyscanner etc.), followed closely by Airlines at 46% (Qantas Airways, Virgin Australia, Jetstar etc), General travel (TripAdvisor, Public Transport Victoria, Qantas) and Automotive transport (Uber, DiDi etc),[4]



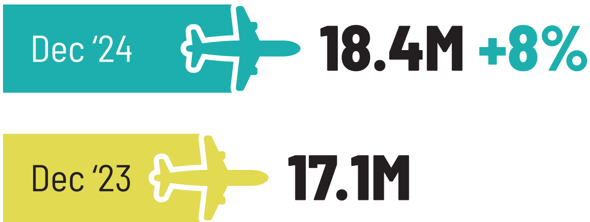
Audience growth across the total travel category is being driven by GenZ and GenX

At an overall category level, both audience and time spent has grown in the past 12 months, with a particularly strong spike in time spent. Australians are spending around 4 minutes more per month within the Travel category than a year ago.

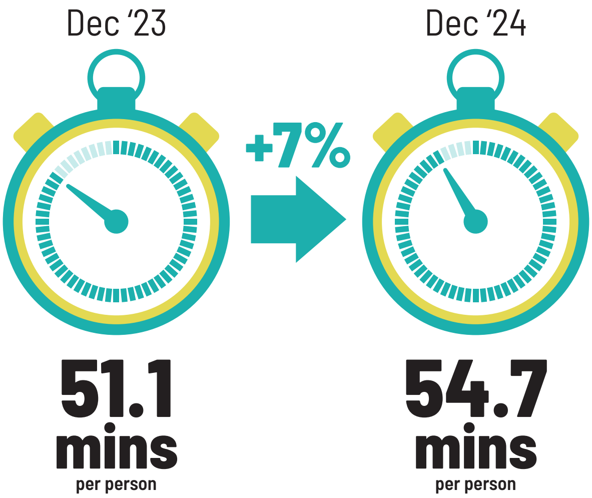
Ipsos iris data reveals that year-over-year audience growth within the travel category is strongest among two distinct demographics: Australians under 24 years old and those aged 40 to 54, encompassing Generation Z and Generation X.

The growth in time spent is a good indicator for people planning holidays and overseas trips. For the younger cohort this may be their first opportunity to have an extended trip since Covid lockdowns and for the GenX's it could be a career break or long service leave.

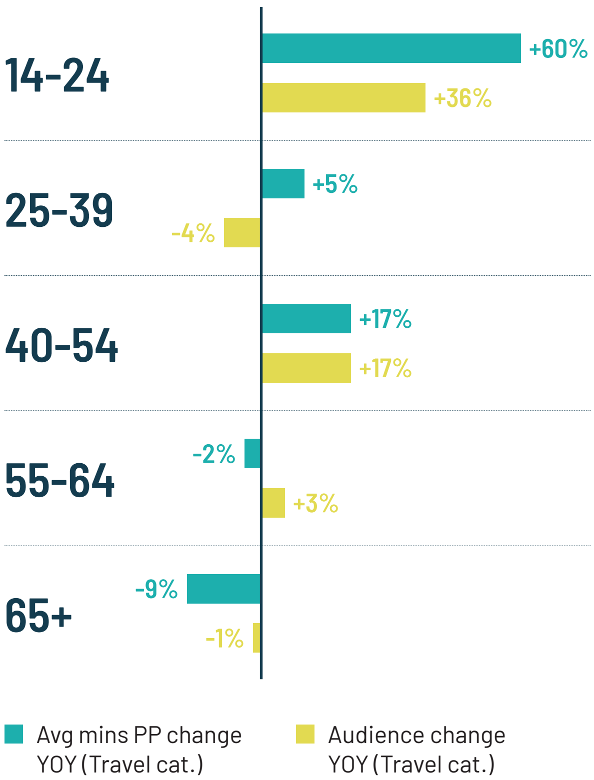
Travel category - Total audience[6]



Travel category - Average mins per person



Travel category audience and avg mins per person % change - YOY by age group[7]



Category insights – usage, growth, engagement

Australians are showing increased interest in most transport modes inc. Rail/ Train, Automotive, and Airline

During this period, there was a significant YOY increase in the number of Australians visiting Rail/ Train, Other Travel (Flightradar24, Rome2Rio, Getyourguide etc) and Automotive Travel websites or apps, with these subcategories experiencing double-digit growth even though they are mainly non-discretionary travel categories.Rail/Train audience reach increased by 32% YoY, Other Travel by 21%, Automotive by 17%. In fact, seven travel categories out of ten have seen increases in audience reach %.

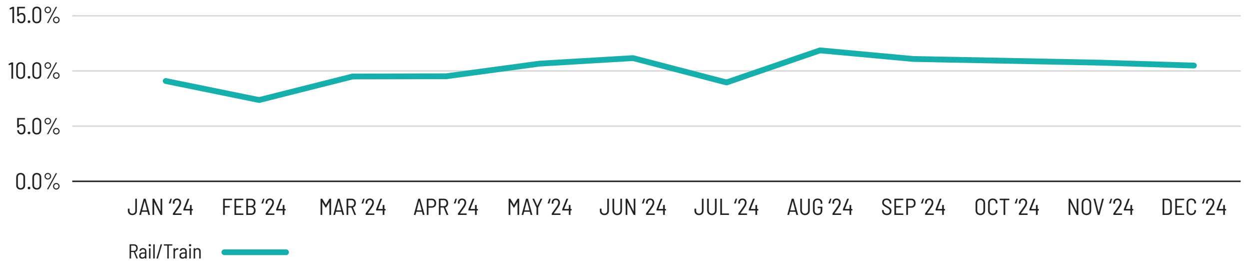
This trend illustrates that the Travel category is trending high on Australians online consumption habits, regardless of if they are intending to travel abroad or not, with mode of transport being generally favoured except for the Cruise category.

Rail/Train travel category correlates with school holiday off peaks and back to office. Audience drops during February, and again in July and tails off from Aug through the December 2024.

The 10 Travel subcategories by audience growth past year[8]

	Audience 000s Dec 2024	Audience Reach % Change YOY
Travel (Whole category)	18.4M	+7.9%
Rail/Train	1.7M	**+32%**
Other Travel	6.5M	**+21%**
Automotive Transportation	7.8M	**+17%**
Online Travel	10M	**+16%**
General Travel	8.3M	**+13%**
Airline	8.9M	**+12%**
Hotel/Resort & Home Sharing	7.8M	+4%
Cruise	2.8M	-0.1%
Travel (news only)	5.1M	-0.5%
Tourist Information	6.9M	-2.5%

Travel: Rail/Train Audience



Top Travel sites, accommodation and flight comparison sites

Despite inflation, almost all Travel related brands in the top 15 list by audience size produced year-on-year audience growth, with Expedia, Virgin Australia and Public Transport Victoria showing the strongest increases, followed by DiDi and Wotif.

The strong growth for DiDi, Virgin Australia and Public Transport Victoria is likely attributed to Australians seeking value in the face of rising costs for both essential and discretionary expenses.

Using Ipsos iris to investigate the big winners of time spent share within the total Travel category, it illustrates that the top three online brands are Uber (excl UberEATS), Booking.com and Qantas Airways.

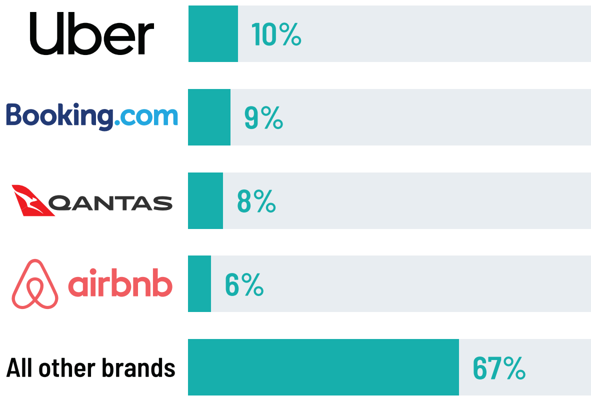
It's likely that these brands are heavily utilised during the festive seasons, getting to and from events both domestically and internationally, via air, road or both.

Uber takes top spot for share of total minutes, accounting for 10% total time spent illustrating strong show for Automotive Rideshare Brand Group.[10]

Top 15 Travel brands by audience[9]

	Audience 000s Dec 2024	Audience Reach % Change YOY
Uber	7.1M	+11%
Booking.com	6.7M	**+24%**
Qantas Airways	6M	+2%
TripAdvisor	5.9M	**+4%**
Airbnb	3.9M	+18%
Virgin Australia	3.3M	**+29%**
news.com.au - Travel	3M	**-4%**
Jetstar	2.9M	+6%
Expedia	2.7M	**+45%**
DiDi	2.1M	**+28%**
Skyscanner	2M	**+19%**
Public Transport Victoria	1.9M	**+34%**
Wotif	1.7M	**+27%**
Flightradar24	1.6M	**+20%**

Share of Total mins- Travel category



If we look closer at the audience growth of the booking.com App user base, we see that this was strongly driven by male with a +50% YOY increase vs. a more subdued 24% increase for female

+50% **+24%**

If we look closer at engagement growth within the Booking.com App user base, we can see that this was strongly driven by young Australians aged 14-24 with a 169% YOY increase in audience number. 40-54 year olds also increased by 74%.

+169%
P14-24

Apps are becoming increasingly essential in the Travel category

In December 2024, travel apps accounted for over two thirds of total time spent in the Travel category. This highlights the critical importance of engaging and well-designed feature-rich apps in the travel industry for customer retention and expansion.

The inclusion of functionalities such as boarding tickets within these apps underscores their significance to the end user.

These increases illustrate the importance of apps for its end users, giving more choice and ease of use.

Share of mins spent within sub-category on apps[11]

Hotel, Resorts & Home sharing apps:
58% total mins Dec 24
vs. 56% Dec 23

Online Travel apps:
46% total mins Dec 24
vs. 39% Dec 23

Airline apps:
33% total mins Dec 24
vs. 32% Dec 23

Apps account for
64%
of all time spent within the total Travel category December '24

Year-on-year, there has been a 15% increase in the number of Australians using Travel related apps[12]

App usage – Travel sub - category - Audience 000s[13]

Dec '24
10,939,000

+15%

Dec '23
9,512,000

Growth in loyalty to Automotive Ride apps

Consumers consolidated their preferred brands in the Ride Share and Taxi space. From this time last year there is a clear increase in the exclusive use of rideshare and taxi apps across the top three automotive app brands.

Automotive Travel App exclusivity YOY comparison[14]

Exclusive user base

	Dec'23	Dec'24
Uber	71%	75%
DiDi	27%	41%
13cabs	45%	55%

Travel Mobile Apps- Topline user profiling[15]

App user profiling provides valuable insights into predicting user engagement with different travel websites. Automotive platforms tend to attract a younger demographic. In contrast, Airline apps are more popular among users aged 40 and above, especially those in mid-to-high income brackets.

While this observation doesn't exclude other age groups from airline apps, it suggests that the higher costs are associated with airline tickets in general. General travel apps appear to be popular among parents and guardians, suggesting a potential interest in researching travel options for larger family or friend groups.

Automotive

Examples: Uber, DiDi, 13cabs

- Age 14-39 skew
- Child free Households
- Mid and High personal income skew
- Employed full time or part time
- "Prepared to pay more for products that makes life easier

Airline

Examples: Virgin australia, QANTAS, Jetstar

- Age 40-64 skew
- Mid and High-level personal income
- Tertiary educated
- "Passionate about travelling"

Cruise Travel

Examples: Royal Caribbean International, P&O CRUISES, PRINCESS

- Age 40 plus skew
- Parent or Guardian
- QLD, SA and NT
- Low-income group
- "prefer NOT to be active during leisure time"

Tourist Information

Examples: News, AllTrails, W

- Age 40-54,
- SA, NT and WA skew
- Mid-High personal income
- Heavy Business sector users

Hotel, Resorts and Home Sharing

Examples: airbnb, Hotels.com, LUXURYESCAPES

- Strong female skew
- Age 25-54
- Tertiary educated skew
- Employed full time or part time
- Heavy Search Engine users
- "Have a keen sense of adventure"

Airlines under the lens

Qantas still #1, but Virgin Australia catching up

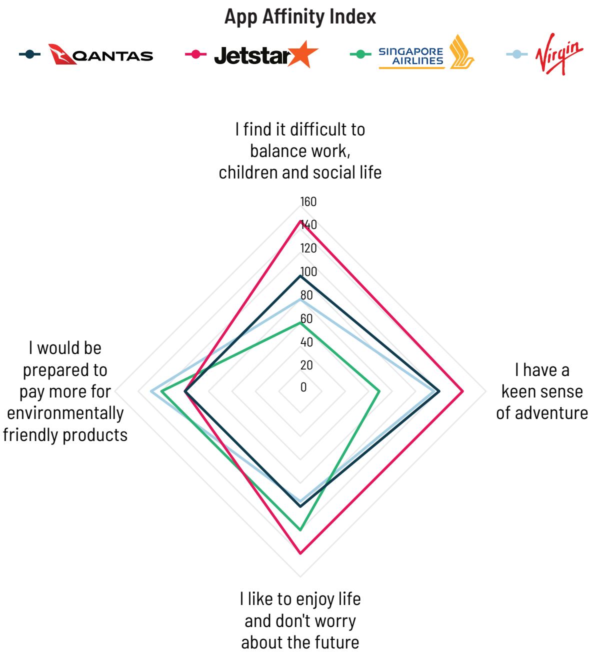
The significant year-on-year audience growth observed for several airline brands, including a 29% increase for Virgin Australia, a 24% increase for Singapore Airlines, and a considerable 64% increase for Emirates, suggests a potential shift in consumer behaviour within the Australian airline market looking at domestic and international travel. This trend could indicate that Australians are increasingly prioritising value and seeking out competitive offers when selecting air travel options.

In terms of audience profiling, Ipsos iris can demonstrate attitudinal skews for users of each airline app. Below are some interesting affinity indices for users of Qantas, Jetstar, Singapore and Virgin Australia apps.

Airline sub-category brand reach & YOY change[16]

	Website audience reach % & audience 000s - ranked		YOY audience % change
Qantas	28%	6M	+2%
Virgin	16%	3.3M	+29%
Jetstar	14%	2.9M	+6%
Singapore Airlines	4%	807K	+24%
Qatar Airways	2%	489K	+18%
Emirates	2%	487K	+64%
AirAsia	2%	388K	-14%
Cathay	2%	349K	+55%
Air New Zealand	2%	328K	+74%
Malaysia Airlines	1%	319K	+197%

Airline Apps – Audience affinities Net Agree index[17]



Cost of living pressure favours DIY accommodation platforms

Online booking site Expedia had a strong Dec 23 to Dec 24 YoY growth with +45% increase in audience and +60% total time spent. Agoda also saw similar audience increase of +57% during the same period.

Wotif saw moderate audience growth of +26% showing stronger affinity index for 40 plus cohorts and Booking.com increased +24% audience and +18% average min spent per person.

Luxury Escapes saw a reduction in audience figures of -19%. This data illustrates the market conditions, with Australians willing to land on booking websites but perhaps reluctant on luxury travel.

Hotel category audience reach increased by +4%, but average minutes per person has increased by +38%.

The economy drags on Cruise interest

Australians are spending less digital time on the Cruise category. Audience size was stagnant, with total time and average min spent dropped by -33%.

PO Cruises shows -10% decline in audience compared to YoY Dec 24 but grew its share of time spent in the category by 19%.

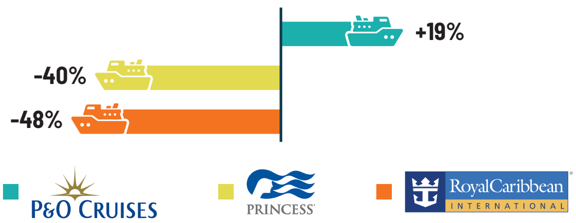
Princess saw +4% increase in audience but time spent dropped by -40%.

Royal Caribbean audience reduced by -19% and average mins per person reduced by -35%.

Travel category Average Mins per person and YOY change[18]

	Avg Mins PP	Avg Mins PP % YoY
Airline	13.4 mins	+9%
Automotive	19.5 mins	-9%
Cruise	19.9 mins	-33%
General	25.9 mins	+8%
Hotel/Resort & Home Sharing	11.2 mins	+38%
Online	14.4 mins	+12%
Other	10.2 mins	-22%
Rail/Train	4.3 mins	+43%
Tourist Information	5.4 mins	+132%
Travel (news only)	2.9 mins	-15%

Change in share of total minutes in Cruise category by brand[19]



Key Takeaways

The Travel category has experienced steady audience growth, with Australians across 14-24 and 40-54 age groups contributing to a near double-digit increase in audience size and total time spent. As of December 2024, year-on-year growth reached 7.9%.

Travel apps are becoming indispensable: This is particularly true for Automotive Transportation up 14% and Online Travel categories like booking apps up 41%. Overall Travel app audience increased by 15% year-on-year.

Online booking in Travel is gaining traction: This category surged by 16% between December 2023 and December 2024, with the top 5 Brands all recording audience growth.

Automotive Transportation on the rise: This category saw a 17% increase, with Uber and DiDi ranking among the top two. Total time spent in this category surged by 28% year-on-year (sub-categories - websites and apps inclusive).

Cruise Travel is experiencing a downturn: Audience figures, total time spent, and average minutes per person all declined by 33% year-on-year.

Strong growth in Rail/Train travel: This category resonated with the 40-54, 55-64, and 65+ age groups, experiencing a 31% growth in audience size and a 43% increase in average time spent per person.

Research scope and methodology

Why Ipsos iris?

A level playing field for digital content owners and advertisers

IAB endorsement validates the rigor of the operating system, methodology and a nationally representative panel (demos, geosplits etc.).

A measure of audiences for digital content

Huge pool of data on digital behaviour collected every second from 8,000 devices, stemming from a single source passive panel, which allows for de-deduplicated cross device consumption analysis.

Second-by-second monitoring of usage of all apps and websites

More effective ad placement and communications strategy from greater understanding of content consumption across different devices and genres.

Demographic, media usage and behavioural profiling

Better audience targeting from enhanced granularity on age, location, socio-economic characteristics as well as purchase and lifestyle interests and offline media use.

Advanced attitudinal and lifestyle profiling

Deep audience profiling on key attitudes and interests including:

- Ambition; balance; spontaneity; adventure; environmental, charitable; money; appearance; active; fashion conscious; premium shopper; early adopter
- Cosmetics; health conscious; designer brands; tech adopter; home décor; travel fan; credit user; cultural diversity; price conscious; carefree; SVOD/BVOD fan; online shopper
- Ethical; celebrity follower; eco-friendly

Rich demographic and media usage profile

Age	Grocery Buyer Status	State
Gender	Children under 18	Metro vs Regional
Ethnicity	Parent or Guardian	FTA TV Last 7 days
Personal Income	Grandparent	Radio Last 7 days
Household Income	Work Status	Newspaper Last 7 days
Occupation	Education	Magazine Last 7 days

Robust methodology: 4 key inputs

1. Establishment survey
2. Mobile first single source panel
3. Site centric measurement
4. Data integration

Metrics and Sources

Ipsos iris digital metrics

- **Total online AU population Age 14+:** Total online population of Australians who are aged 14 years or older, this number is set and will not change in this report. See below for AU online population as of Dec'24:
  -Total AU internet population (Age 14+): 21.5M
- **Audience 000s:** The number of people in a target audience, who visited the selected media, i.e. 18.4M Australians 14+ visited the Travel category in the month of Dec'24.
- **Audience reach %:** The percentage of people in a target audience, who visited the selected media, i.e. 86% of online Australians 14+ visited the Travel category in the month of Dec'24
- **Audience affinity Index ("ix" or "index"):** The ratio of audience composition to the target audience composition (from the selected universe), e.g. 14-39 age groups are more likely to use Automotive apps vs. the average online Australian 14+.
- **Average Mins PP:** Average amount of time spent (minutes) by a personTotal Mins (MM): The total time spent in minutes by the target audience on the selected digital media, category or brand.
- **Total Mins (MM):** The total time spent (minutes) from the selected media, by the selected target audience. Active time spent is measured for all visits without being inactive for longer than 30 mins.
- **Category:** Category Groups offer a consistent comparison of grouped data across different media owners by Content Category. Ipsos has made available Content Categories
- simplified from the IAB Global Taxonomy 2.0 that tagging media owners may assign to their Website Sections, Section Groups, or apps.
- **Sub-category:** Groupings that fall under the category, e.g. Airline sub-category will fall under the Travel category

Sources

1 Source: https://www.homeaffairs.gov.au/research-and-statistics/statistics/visa-statistics/live/overseas-arrivals-and-departures

2 Source: Ipsos iris Online Audience Measurement Services, December 2024, People 14+, PC/Laptop/smartphones/Tablet, Travel Category, Tier 1 and Tier 2, Audience

3 Source: https://www.abs.gov.au/statistics/economy/national-accounts/tourism-satellite-account/latest-release#main-features

4 Source: Ipsos iris Online Audience Measurement Services, December 2024, People 14+, PC/Laptop/smartphones/Tablet, Travel Category, Tier 1 and Tier 2, Audience

5 Source: Ipsos iris Online Audience Measurement Service, December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Travel category, Tier 2, Audience (000s), Audience reach %

6 Source: Ipsos iris Online Audience Measurement Service, December 2024 vs. December 2023, People 14+, PC/laptop/smartphone/ tablet, Text only, Travel category, Audience (000s), Audience time spent (Ave mins per person)

7 Source: Ipsos iris Online Audience Measurement Service, December 2024 vs. December 2023, People 14+, PC/laptop/smartphone/ tablet, Text only, Travel category, Profile Age Summary, Audience (000s), Audience time spent (Ave mins per person)

8 Source: Ipsos iris Online Audience Measurement Service, December 2024 vs. December 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Travel category, Tier 2, Audience (000s), Ave Mins per personlaptop/smartphone/tablet, Text only, Travel category, Tier 2, Audience (000s), Ave Mins per person Ipsos

9 Source: Ipsos iris Online Audience Measurement Service, December 2024 vs. December 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Travel category Tier 1 & 2, Audience (000s), Audience, Text only, Brand group, Audience (000s), Audience Reach %

10 Source: Ipsos iris Online Audience Measurement Service, December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Travel Category, Brand group, Total Mins, AVE Mins Per Person

11 Source: Ipsos iris Online Audience Measurement Service, December 2023 vs. December 2024, People 14+, PC/laptop/smartphone/ tablet, Text only, Apps, Travel Category, Hotel/Resorts @ Home sharing, Online and Airline sub-category, Audience (000s), Total Mins

12 Source: Ipsos iris Online Audience Measurement Service, December 2024 vs. December 2023, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Travel Category, Brand groups, Audience (000s), Total Mins MM

13 Source: Ipsos iris Online Audience Measurement Services, December 2024, People 14+, PC/Laptop/smartphones/Tablet, Apps, Travel Category, Tier 1 and Tier 2, Audience

14 Source: Ipsos iris Online Audience Measurement Service, December 2023 Vs, December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Travel selected categories, Apps Brand Group Uber, DiDi, 13cabs as of December '24, *Exclusive audience

15 Source: Ipsos iris Online Audience Measurement Service, December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Travel Category, Automotive, Airline, Cruise, Tourist Info, Hotel/ Resort sub- category, Audience 000s, Exclusive %, Audience affinity index & composition

16 Source: Ipsos iris Online Audience Measurement Service, December 2023 to December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Apps, Travel Category, Airline sub-category (Top 10 apps only included), Audience 000s, YOY Audience % change

17 Source: Ipsos iris Online Audience Measurement Service, Airline App, Attitudinal affinity net agree index (Qantas Airways, Jetstar, Singapore Airlines and Virgin Australia)

18 Source: Ipsos iris Online Audience Measurement Service, December 23 to December 24, People 14+, PC/laptop/smartphone/tablet, Text only, Travel Category, Tier1, Ave MM PP, total Mins

19 Source: Ipsos iris Online Audience Measurement Service, December 2023 to December 2024, People 14+, PC/laptop/smartphone/tablet, Text only, Brand, Cruise Travel sub-category, Audience (000s), Total Mins MM

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