Wolfenden

The Trends That Matter:
Travel & Leisure Retail.

Marketing
That Matters.

Introduction to Report.

The travel and leisure retail industry is one which has arguably experienced the most change throughout the pandemic. Lockdown measures forced the tourism market as a whole to a halt, and many leisure activities were initially suspended.

The UK's travel market in particular is seeing positive signs of recovery, with many Brits holidaying in the UK this Summer. Outdoor activities – such as cycling, outdoor swimming and walking – have also vastly risen in popularity, as the nation found its love for the outdoors.

So, when it comes to marketing, it's been incredibly difficult for companies within this sector to take a long-term approach, unable to rely on previous data to predict what behaviour might be. That's why it's been more important than ever to stay on top of trends to determine when and where consumer confidence may return.

At Wolfenden, we know from working with our own clients in the UK travel sector that it's been key to maintain organic activity to prepare for when demand does return, shifting budget and resource to align with the trends we're seeing.

This approach meant that when the government announced the lockdown easing plan in February, our clients were as visible as they could be for the revival in demand.

"Outdoor activities – such as cycling, outdoor swimming and walking – have vastly risen in popularity."

In this report, we've analysed keywords across the UK travel and leisure sector to discover the top organic performers here, delving into what's helping them perform as well as revealing what search trends brands in this sector should be aware of.

UK Travel & Leisure Retail State of Play.

Understandably, IBIS World reports that year-on-year revenue is expected to fall for UK accommodation by 62.8% in 2020-21, due to the pandemic. However, whilst the effects of a plunge in international travel are still being felt, there is hope on the horizon.

The growing trend for staycations is supporting the UK holiday accommodation industry, and domestic guests are expected to account for 98.7% of revenue for 2020-21 (IBIS World). Revenue is expected to recover, and it's UK holiday-goers that are the way out. Over the next five years, it's expected that domestic guests will account for the majority of UK accommodation revenue.

Not only are Brits hedging their bets on holidays in the UK this year, but we're also discovering a new kind of holiday – the outdoor kind! Whilst camping products usually see a big spike in line with major festivals (which were all cancelled in 2020) the industry has been supported by a surge in popularity for glamping. With much of the UK's accommodation in staycation hotspots such as Cornwall booked up for the Summer, holidaymakers are choosing to glamp as an alternative. This offers a new style of holiday to high-income consumers that might otherwise be unwilling to camp.

This newfound love for the outdoors is also heavily reflected in sports and leisure retail performance. Whilst industry revenue is expected to fall overall as a result of physical shops being forced to close and an initial hit to discretionary spending; the demand for bikes has been the saviour for industry revenue as a whole.

For example, Halfords has reported a growth in sales in its cycling category by a massive 49.1% year on year. In 2020, it was also reported there had been a 200% increase in the use of cycle-to-work schemes. Plus, with more government initiatives to keep people active expected, as well as growing environmental concern, this is a sector that will continue to grow in popularity.

> "The demand for bikes has been the saviour for industry revenue as a whole."

As you'll read, there's also been an increase in popularity for other outdoor activities – such as walking, running, and outdoor swimming – all leading to better than anticipated performance for outdoor retailers. Not only were people confined to outdoor walks and meet-ups, but they have looked to improve their health and wellbeing during the lockdown.

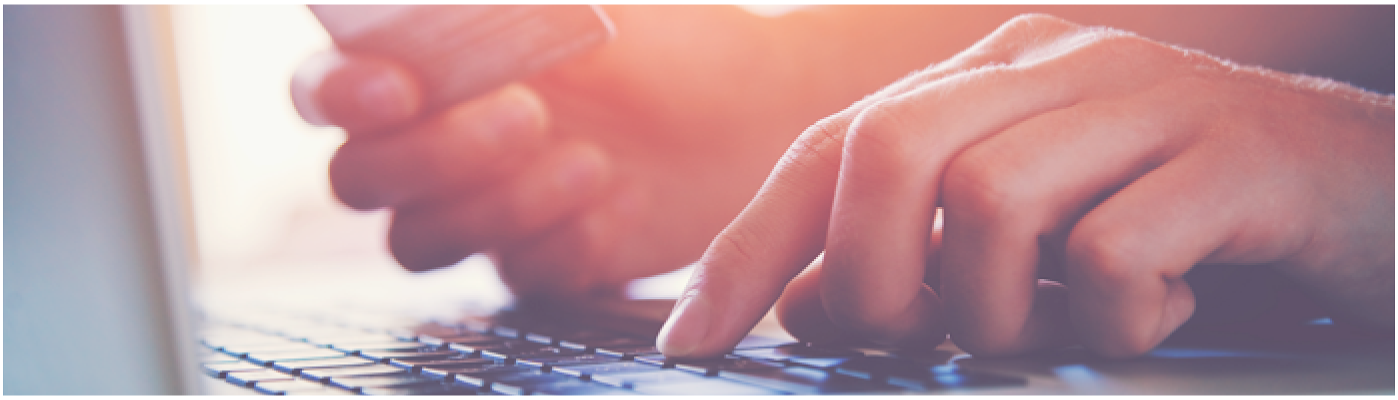
As economic conditions become more certain, it's expected that consumers will increase discretionary spending on products that promote health.

Overall, this is a sector that is seeing a huge amount of recovery and is expected to grow even more so in coming years.

The Top Organic Performers in UK Travel & Leisure Retail.

Brand	Branded Search Vol	Page 1 Rankings (All)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Decathlon	944,000	586	1.13	54,423	73	2,230,000	6,270
Sports Direct	3,150,000	484	1.59	131,160	75	673,000	15,900
Go Outdoors	888,000	377	1.55	47,383	71	162,000	4,180
Argos	16,830,000	315	0.643	653,617	81	4,750,000	31,700
Blacks	123,000	237	1.69	23,414	69	1,070,000	2,560
Millets	146,000	221	1.41	20,578	69	1,150,000	2,090
American Golf	176,000	213	1.75	14,025	64	39,600	1,610
JD Sports	1,330,000	168	1	57,866	74	367,000	6,100
Mountain Warehouse	562,000	156	1.31	19,933	66	198,000	3,870
Powerhouse Fitness	29,000	138	0.565	5,489	49	14,000	1,110
Fitness Superstore	46,000	136	2.13	5,410	48	13,000	2,290
Tredz	124,000	131	2.14	14,878	56	93,700	2,730
Evans Cycles	291,000	131	0.995	27,292	71	193,000	5,390
Golf Online	7,200	128	0.378	6,119	49	16,700	1,060
Wetsuit Outlet	13,000	105	1.33	2,450	41	16,600	720
Golf Bidder	55,000	83	0.615	4,466	38	28,300	734
Surfdome	46,263	80	0.372	13,294	63	7,110,000	3,120
Camping World	8,900	61	2.4	4,499	43	14,400	1,160
Halfords	2,970,000	57	2.18	78,299	75	871,000	17,200
Kayaks And Paddles	1,600	16	1.58	2,216	35	7,060	696

To give us the best idea of visibility within this sector, rather than as a whole across all products, we´ve sorted the brands by page one rankings for the relevant sector keywords analysed.



Argos and Halfords have some of the highest brand search volumes (Argos by a long way) and it's a similar story when we look at search visibility, but as they both sell a much wider product base (not just sport and travel retail) this is to be expected.

When we look at page one rankings however, this gives us a clearer idea of leaders within this sector: Decathlon, Sports Direct and Go Outdoors come out on top. Some of the more niche brands which concentrate only on one main type of sport or activity hold the least page one rankings, including Camping World, Halfords and Kayaks and Paddles.

Top-ranking sites have very deep navigations, covering even the most niche of outdoorsy pursuits - granularity that even Argos struggles to match."

Halfords has one of the longest page load speed times at 2.18 seconds, compared to its close competitor Evans Cycles' 0.99 seconds. Ideally, brands should be aiming for page load times under two seconds, so this is something Halfords, as well as Camping World, Tredz and Fitness Superstore should look to invest in, particularly ahead of Google's Core Web Vitals rollout.

Decathlon has an incredibly granular site structure, which makes it an easy choice to rank for many of the chosen terms. So, it's no surprise that they come out on top as they have content and product for almost everything you can think of within this sector, combined with a speedy site and a strong backlink profile.

Interestingly, Decathlon has its entire content section on a different subdomain – play.decathlon.com – this goes against best practice recommendations and suggests that the site may be even more dominant, if it migrated this area onto its main site.

Similarly, the other top-ranking sites have very deep navigations, covering even the most niche of outdoorsy pursuits - granularity that even Argos seemingly struggles to match, potentially due to its greater breadth of content. All three top ranking sites are taking full advantage of their niche.

Most sites have a small blurb of content on their landing pages followed by a list of products. For brands in this sector to differentiate themselves, it may be worth considering a different style of landing page to cut-through in this market.

Top Organic Perfomers in Cycling.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Evans Cycles	291,000	129	1.00	27,292	71	193,000	5,390
Tredz	124,000	126	2.14	14,878	56	93,700	2,730
Decathlon	944,000	91	1.13	54,423	73	2,230,000	6,270
Argos	16,830,000	58	0.64	653,617	81	4,750,000	31,700
Halfords	2,970,000	57	2.18	78,299	75	871,000	17,200

Again, we can see here that Argos and Halfords lead in terms of brand search volume and visibility due to having a much wider product base than just cycling equipment. Evans Cycles and Tredz are the only niche cycling brands on the list, and they dominate page one rankings, with Evans Cycles on top.

Tredz could benefit from significantly increasing the amount of backlinks and referring domains pointing to the site to improve domain rating and therefore overall visibility. This would also help boost its branded search volume; whilst it could be unrealistic to attain the level of Evans Cycles with its bricks-and-mortar shops, there is certainly a lot of room to improve. It would also be beneficial for Tredz to look at decreasing its page load speed time.

Top Organic Perfomers in Camping.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Go Outdoors	888,000	175	1.55	47,383	71	162,000	4,180
Millets	146,000	108	1.41	20,578	69	1,150,000	2,090
Blacks	123,000	101	1.69	23,414	69	1,070,000	2,560
Argos	16,830,000	83	0.643	653,617	81	4,750,000	31,700
Camping World	8,900	60	2.4	4,499	43	14,400	1,160

When it comes to page one rankings for camping terms, Go Outdoors comes out on top. Again, the granularity of its site structure means that it's able to rank for more terms. Blacks and Millets should both consider breaking out further into different types of camping equipment available, if they have the products to do so.

The camping sites also make much better use of content than some other niche sectors, for example https://www.millets.co.uk/blog/ and https://www.gooutdoors.co.uk/expert-advice/camping, although both could be better integrated through the user journey, as they're quite difficult to find.

Blacks, Go Outdoors and Millets are well established players in the camping market, but there are niche brands such as Camping World and Leisure Outlet which are growing in market dominance, so it's important for even the market leaders to continually optimise performance. Camping World could see further gains by improving page load speed, as well as significantly expanding its backlink profile.

Millets has a huge backlink to referring domain ratio at 1:550, and could improve performance by acquiring more unique referring domains for added authority. Millets could also boost its rankings further by increasing its category content, as currently, some categories don't have any, e.g. https://www.millets.co.uk/tents-camping/sleeping/sleeping-bags/.

Top Organic Perfomers in Golf.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
American Golf	176,000	213	1.75	14,025	64	39,600	1,610
Golf Online	7,200	128	0.38	6,119	49	16,700	1,060
Golf Bidder	55,000	83	0.62	4,466	38	28,300	734
Sports Direct	3,150,000	45	1.59	131,160	75	673,000	15,900
Decathlon	944,000	23	1.13	54,423	73	2,230,000	6,270

Sports Direct and Decathlon dominate in terms of brand search volume and visibility; not only do they both offer a product base across a range of activities and sports, but they also offer more accessible price points than other niche golf brands.

When we look at page one rankings, giving us a clearer idea of leaders within the golf niche, American Golf is clearly leading, followed by Golf Online. Despite having a much lower brand search volume than Golf Bidder, Golf Online not only has significantly more page one rankings, but a much higher domain rating and search visibility score.

Golf Online has almost half the amount of backlinks than those of Golf Bidder, but it has many more referring domains, demonstrating the importance of diversifying the amount of referring domains pointing authority towards your site.

Top Organic Perfomers in Gym Equipment.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Argos	16,830,000	150	0.64	653,617	81	4,750,000	31,700
Powerhouse Fitness	29,000	131	0.57	5,489	49	14,000	1,110
Fitness Superstore	46,000	131	2.13	5,410	48	13,000	2,290
Decathlon	944,000	108	1.13	54,423	73	2,230,000	6,270
Sports Direct	3,150,000	75	1.59	131,160	75	673,000	15,900

Argos dominates the market here with the most page one rankings for gym-related terms, however lots of niche brands are growing in this space, including Best Gym Equipment, Sweatband and Exercise.

Fitness Superstore and Powerhouse Fitness, two specialised brands within this space, match each other in the amount of page one rankings. Despite having a much lower brand search volume than Fitness Superstore: Powerhouse Fitness exceeds its search visibility – this site has a much lower page load time (0.56 seconds Vs. 2.13 seconds). This is as well as a higher domain rating, potentially due in part to a higher amount of backlinks.

Top Organic Perfomers in Walking & Hiking.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Go Outdoors	888,000	178	1.55	47,383	71	162,000	4,180
Blacks	123,000	130	1.69	23,414	69	1,070,000	2,560
Sports Direct	3,150,000	114	1.59	131,160	75	673,000	15,900
Millets	146,000	111	1.41	20,578	69	1,150,000	2,090
Mountain Warehouse	562,000	96	1.31	19,933	66	198,000	3,870

This is an area dominated by the sites which sell a range of different brands: Sports Direct, Go Outdoors, Mountain Warehouse. However, looking at the industry a bit wider, a lot of the major established brands which only sell their own items also have a strong presence here – Regatta, The North Face as examples, but with higher price points they don't have as wide a cut-through.

There are hardly any brands here that aren't established and without a bricks-and-mortar presence, meaning it would be difficult for new brands to get into this market.

Top Organic Perfomers in Running.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Sports Direct	3,150,000	151	1.6	131,160	75	673,000	15,900
JD Sports	1,330,000	126	1.0	57,866	74	367,000	6,100
Decathlon	944,000	47	1.1	54,423	73	2,230,000	6,270
Go Outdoors	888,000	8	1.6	47,383	71	162,000	4,180
Argos	16,830,000	3	0.6	653,617	81	4,750,000	31,700

The big multiline sports retailers dominate here, Sports Direct and JD Sports, offering low price points and a wide range of running products across many brands.

There are no niche running brands taking a lead in presence here, however there are a few on the outskirts – Runners World and Sports Shoes. Niche brands could find it hard to compete with the accessibility the low-price points of bigger retailers can offer, but could certainly work to gain presence in the SERPs with specialised content on every aspect of running.

Top Organic Perfomers in Watersports.

Brand	Branded Search Vol	Page 1 Rankings (Niche)	Load Speed	Search Visibility	Domain Rating	Backlinks	Referring Domains
Decathlon	944,000	148	1.1	54,423	73	2,230,000	6,270
Wetsuit Outlet	13,000	104	1.3	2,450	41	16,600	720
Surfdome	46,263	63	0.4	13,294	63	7,110,000	3,120
Sports Direct	3,150,000	53	1.6	131,160	75	673,000	15,900
Kayaks And Paddles	1,600	16	1.6	2,216	35	7,060	696

Here we see many more niche brands sharing the top spots than the other areas looked at: Wetsuit Outlet, Surfdome and Kayaks and Paddles – suggesting the wider sports multiline retailers haven't fully tapped into this market yet.

Niche brands also make up the brands entering and growing in this space – Shore, Ardmoor and Marine Superstore.

Despite having a stronger search visibility score and domain rating than Wetsuit Outlet, Surfdome has potentially lost some of its niche rankings by expanding into so many different products, meaning Wetsuit Outlet outranks them despite being a smaller brand. Wetsuit Outlet also has way more watersport-related terms and pages than Surfdome, which focuses mainly on clothing.

Search Trends in UK Travel & Leisure Retail.

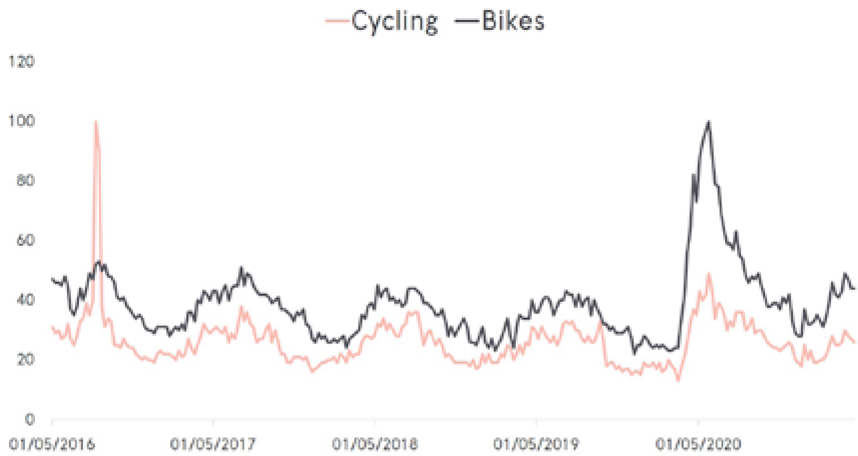
The UK remains passionate about cycling.

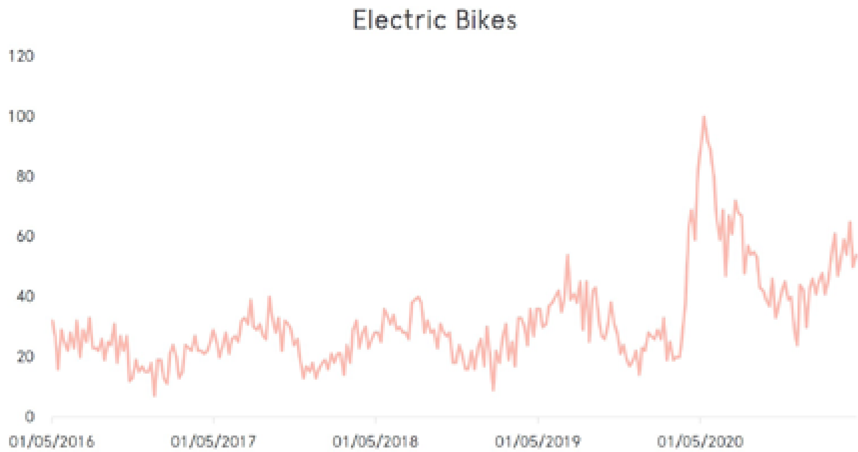
The strong demand for bicycles during the pandemic prevented the sports and outdoor retail industry from being hit even harder than it has been. Halfords reported revenue growth in their cycling category of almost 50% from lockdown to the beginning of 2021.

A range of factors have contributed to this trend: fears of catching COVID-19 on public transport led to people looking for alternative options, growing environmental concerns and a focus on health and fitness.

Cycling was growing in popularity before lockdown: the introduction of Cycle Superhighways in London and cities such as Leeds made a cycling commute even more accessible.

Currently, women account for 27% of cycle journeys, compared with 55% in Denmark and the Netherlands, suggesting there is an untapped market for brands to focus on.





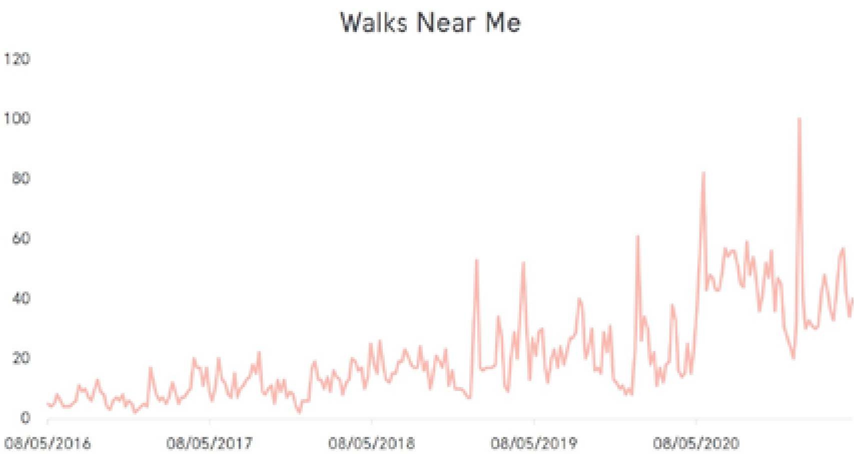
We're continuing to explore the outdoors even after local lockdown.

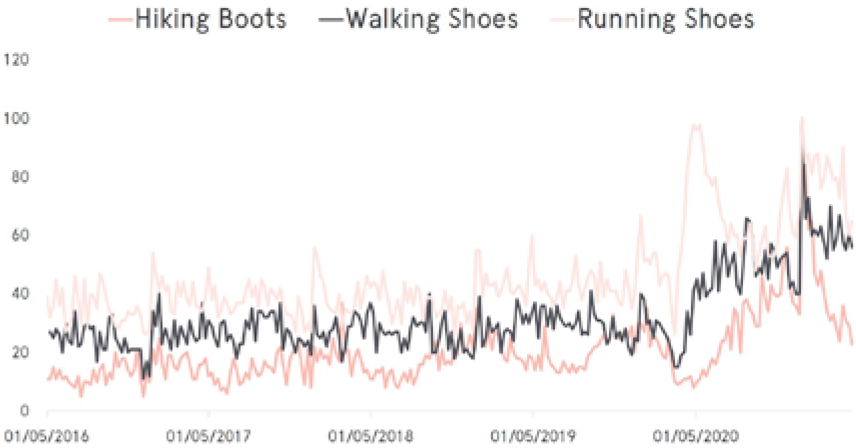
Searches for walks are always typically higher during the holiday seasons like Christmas and Easter, when people don't want to travel and not much is open.

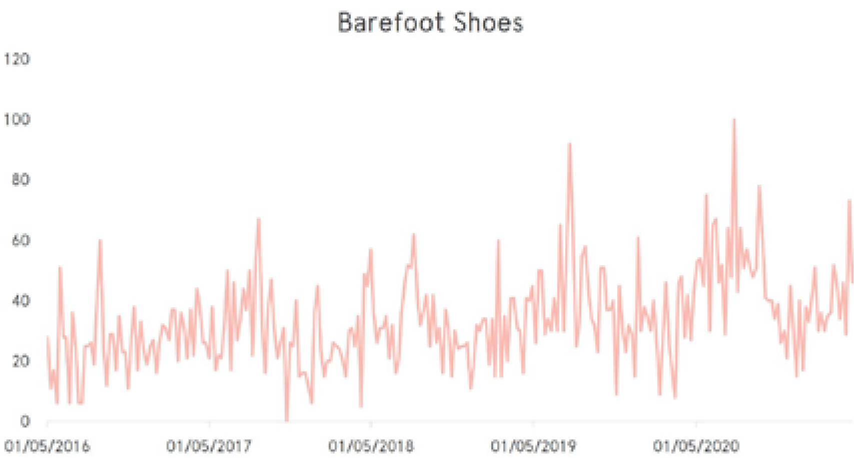
However in 2020, searches spiked in May when it was announced we could meet people for walks, and searches remained fairly consistent throughout the rest of the year and into 2021.

With walking outside our only form of exercise for a while, people began exploring their surroundings, and it seems many fell in love with the outdoors and have continued walking long since the restrictions eased.

Hiking boots tend to be popular during the Winter months as walkers make their way through the mud and rain, and whilst 2020 saw this same trajectory, this uplift was higher than ever, with a huge spike just after Christmas as everyone looked to buy boots in the post-Christmas sales.







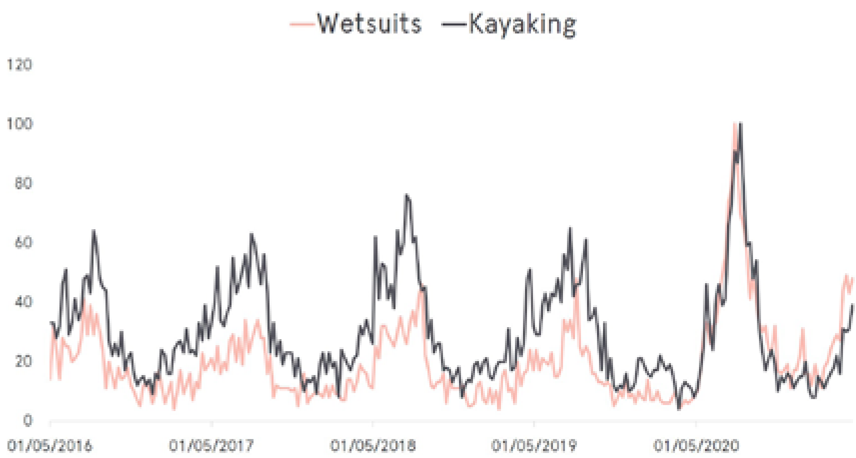
The nation's discovered a love for natural water.

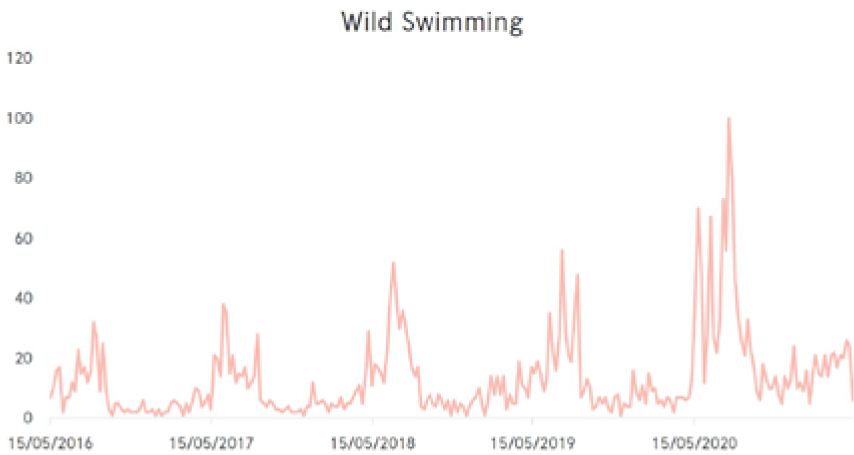
As swimming pools closed, many took to outdoor and wild swimming to exercise in the past year. A report by Outdoor Swimmer found that 45% of swimmers increased how much they swam outside in 2020, and there are reports that outdoor swimming venues have been inundated.

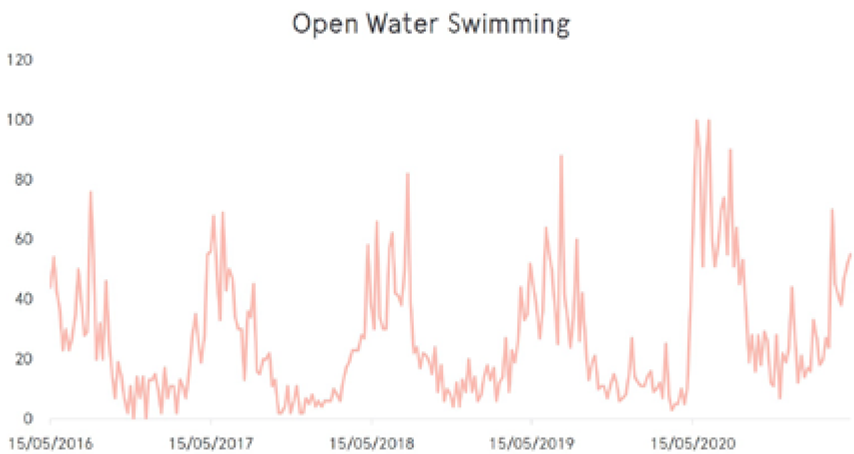
Lauded for supporting good mental health and connecting you with the environment, as well as being accessible to any age group, swimming outside in the UK this Summer is predicted to be up to 3 times higher than previous years.

The same report found that swimmers estimated they spent £200 on average on swim-related kit in 2020. Women appear to be swimming more frequently than men – citing Facebook groups as a source of connecting with other swimmers and sharing outdoor swimming spots.

With a growing popularity in Winter swimming, this is an outdoor trend that even the British weather can't deter.





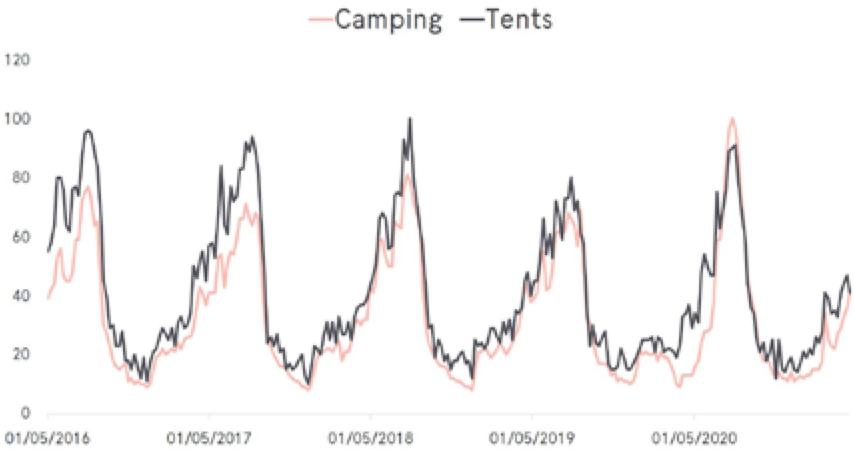


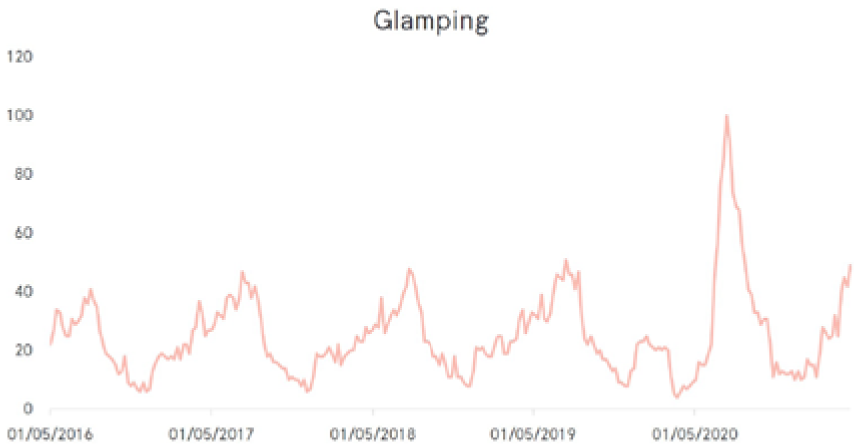
Glamping & outdoor sleepovers have accelerated in popularity.

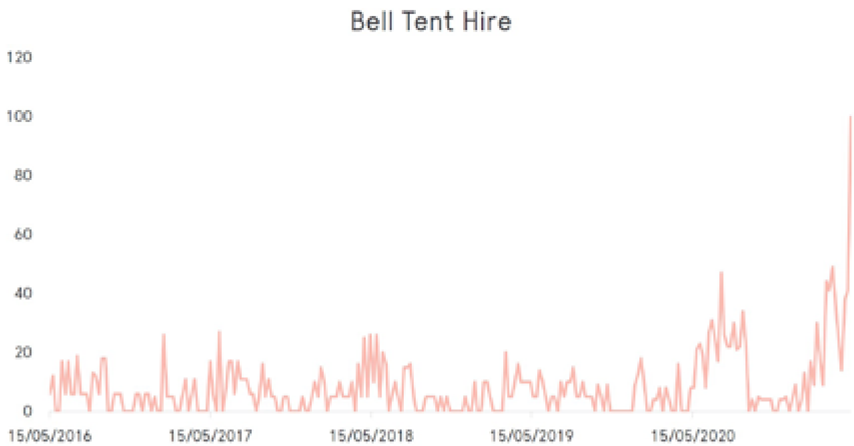
Camping related searches traditionally surge around the time of Summer festivals, but with these cancelled in 2020, it was predicted demand would also drop. However, with many families keen to book camping holidays to replace their holiday abroad, demand for camping products has remained high.

Searches for "family tent" and "campsites" peaked at their highest in five years last Summer and are on the rise again now, as we head into another period of staycations.

Glamping – luxury camping – has also seen a surge in popularity, and searches are currently rising again. With parties unable to take place indoors, searches around "bell tent hire" and "sleepover tents" have also seen huge boosts. Both remain in high demand, with many still opting to hold events outdoors.





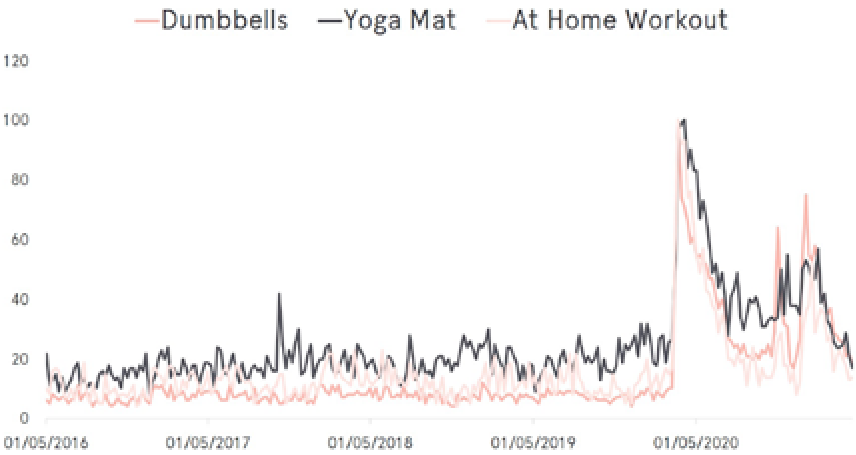


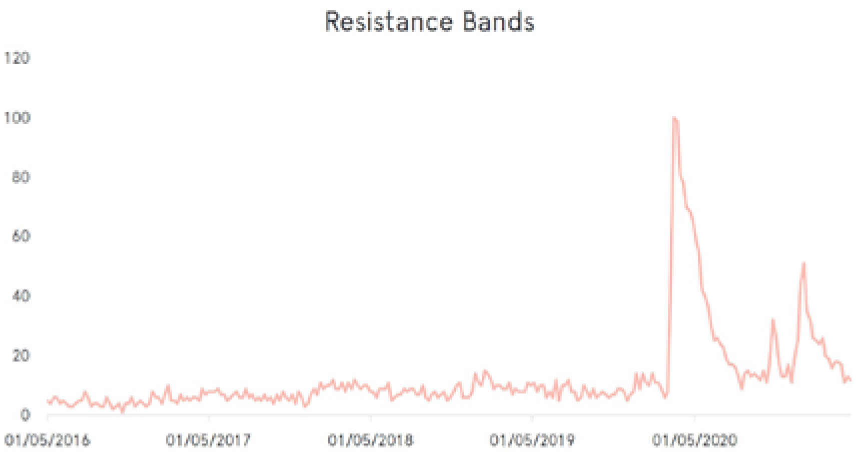
Gym-goers are still building their own workout space at home.

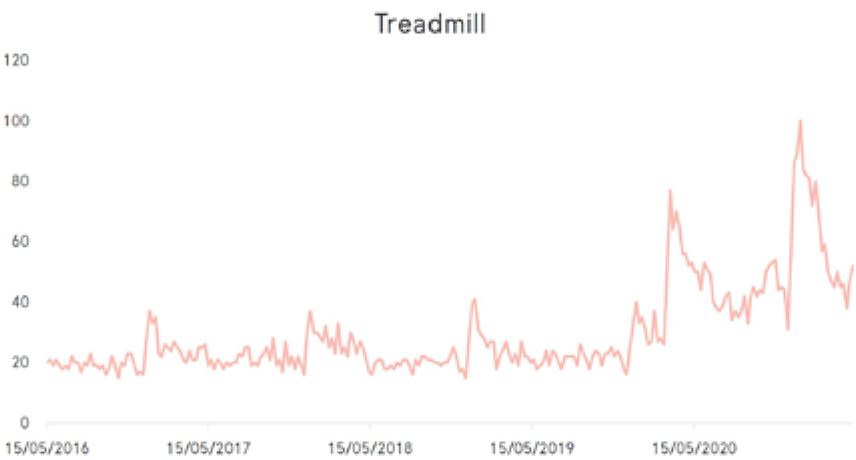
Unsurprisingly, with gyms being closed for the most part of the pandemic, people have been bringing the gym into their homes, with searches peaking across gym equipment and fitness related terms. Additionally, with more people than ever working from home, they've had more time to dedicate to their health and fitness, as well as being conscious of not getting enough exercise without their usual commute.

Equipment particularly only found within gyms, such as "dumbbells" have seen their biggest ever spike, from having a fairly low search volume previously. Resistance bands are also on-trend right now, allowing people to do a variety of exercises without needing a lot of equipment and despite fitness levels, offering a cost-effective way to strengthen muscles at home.

Whilst searches on the whole have fallen to just above average levels, searches for specific at home gym equipment, such as "treadmills" are still on their way up.



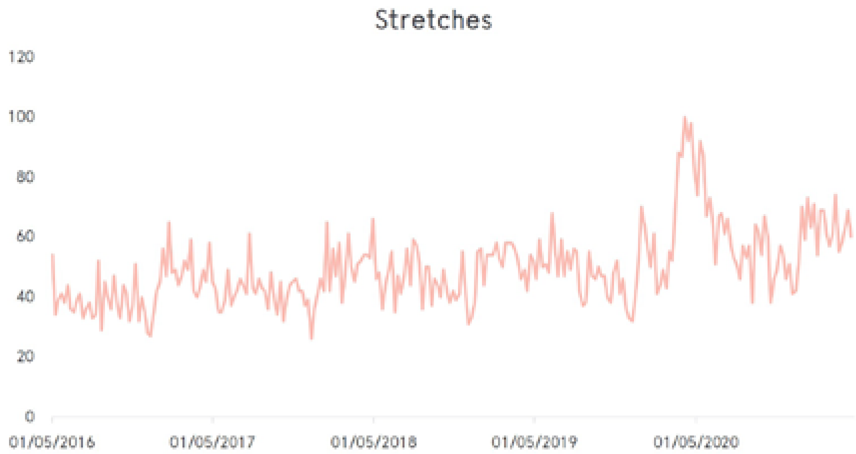


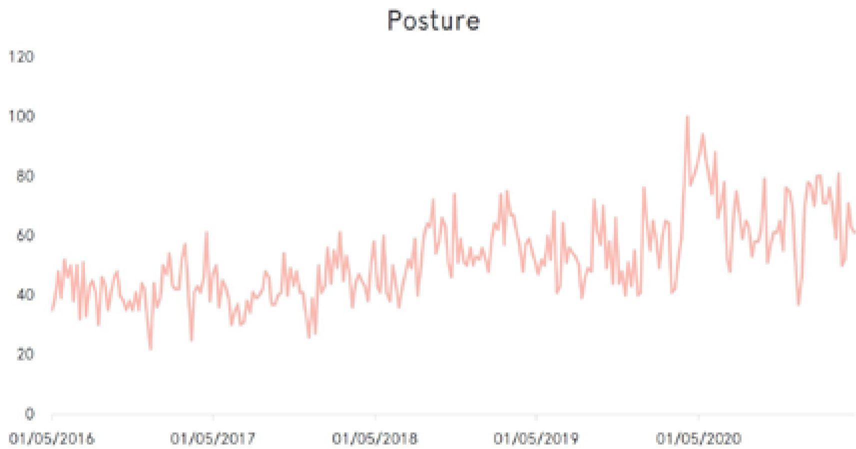


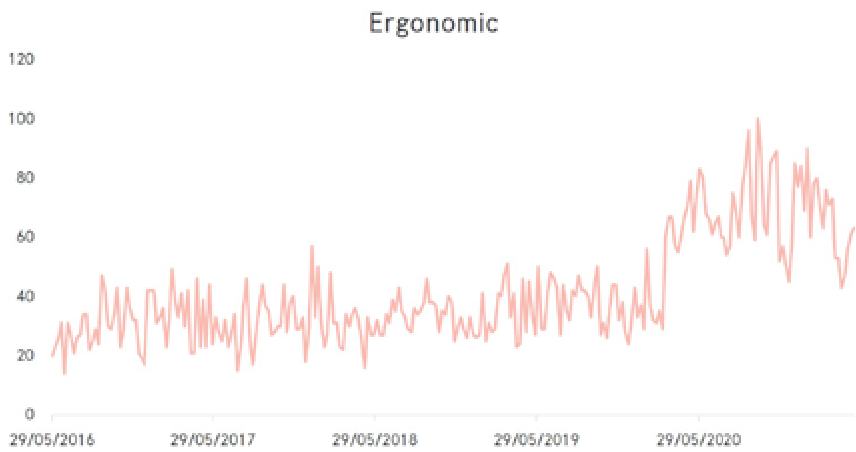
The home office is causing some discomfort.

Searches around "ergonomic" have increased hugely as people try to create the well-designed office spaces they had at work, at home.

With a potentially more sedentary working day whilst working from home, hunched over a laptop, searches around "posture" and "stretches" have increased significantly, suggesting many are trying to find ways to maintain good health in their new working environment.





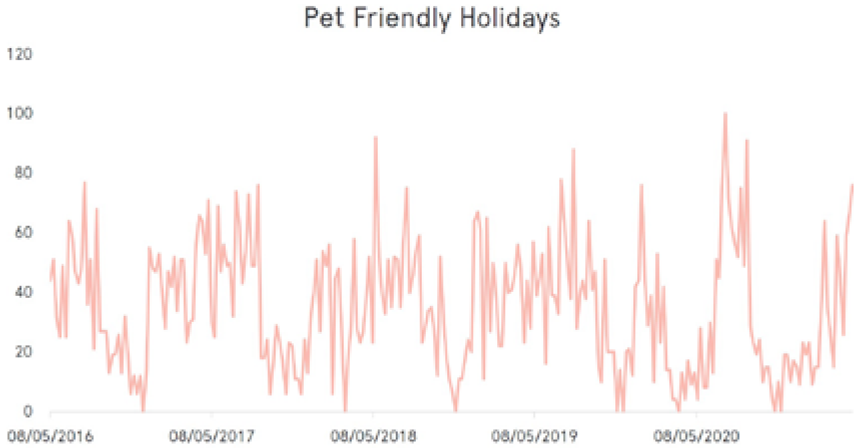


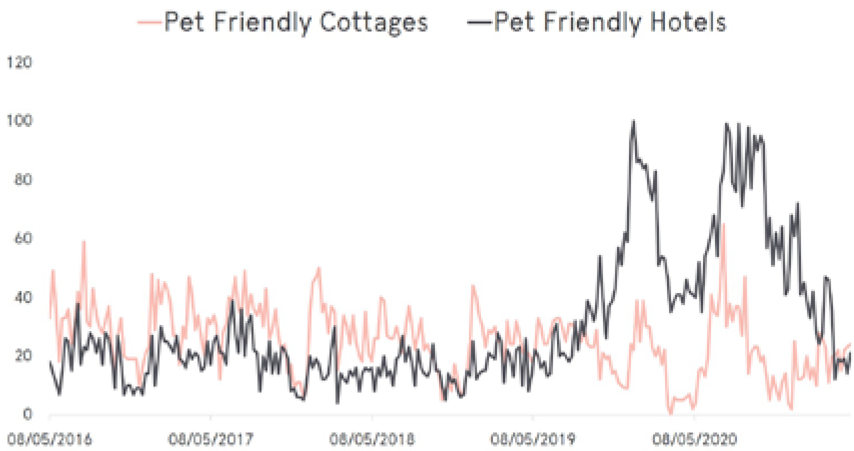
We all want to holiday with our new pets.

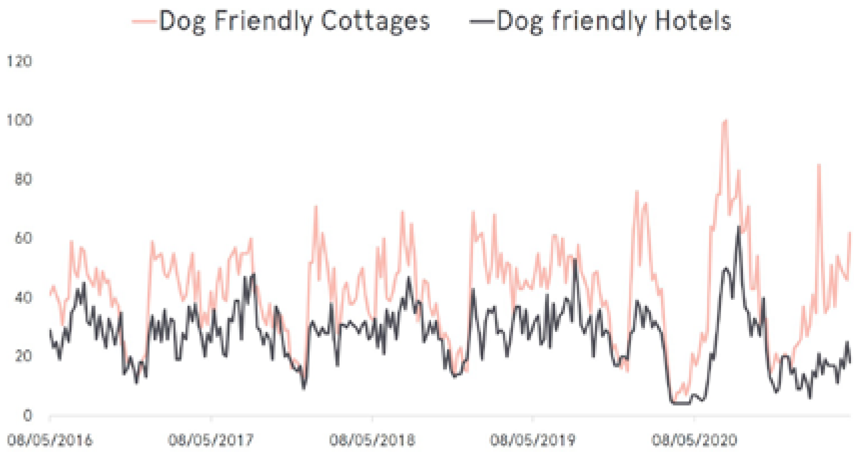
The BBC reports households bought 3.2 million pets in lockdown, and the Dogs Trust has reported a 25% increase in adoptions. It's dog ownership in particular that has surged, with more of us than ever working from home and having the time to dedicate to a new pet, as well as being a way to boost our spirits in difficult times.

So, it's not surprising then, that many of us are also looking to take our pooches on holiday with us.

According to PetsPyjamas, a dog-friendly travel company, there's been an 80% increase in pup-friendly bookings for this year. The trend for dog-friendly holidays is one which is sure to continue well into 2022.





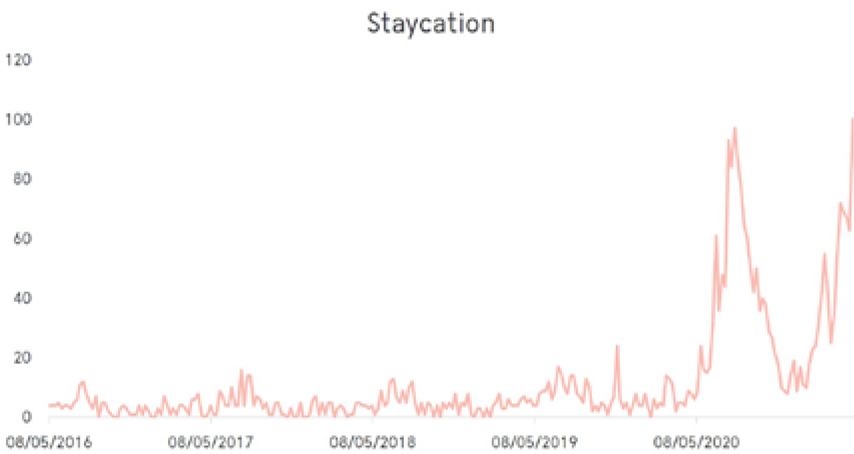


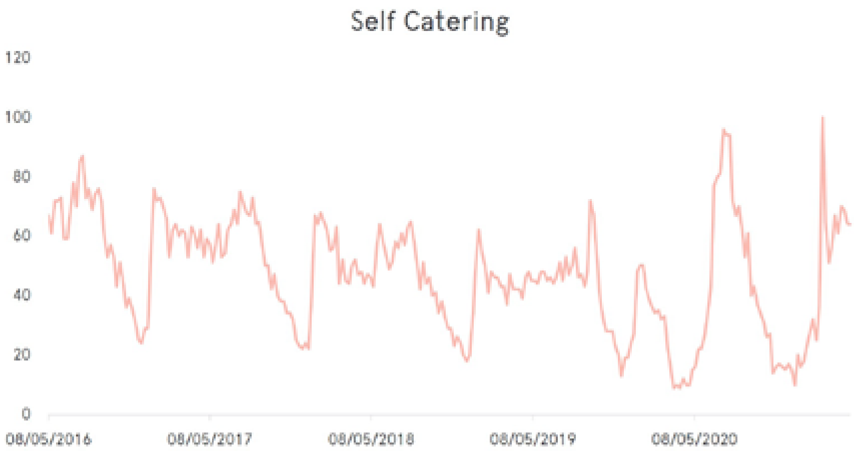
The staycation dominates another summer.

2020 was the year of the staycation. With many people accruing a build-up of annual leave and limited international travel allowed, the UK was the only choice for many.

As we head into Summer 2021, international restrictions as well as concerns around the virus mean that many are still opting to holiday in the UK. Not only are family holidays abroad and couple's city breaks being swapped for the UK, but hen and stag parties are also being booked back in too – with hopes of unrestricted weddings taking place in the Summer, and a backlog of events to get booked in.

Brits are tending to head for more rural areas of the UK rather than cities, and opting for self-catering accommodation. North Yorkshire, Devon and Cornwall make up the top three staycation counties for 2020 – and it's looking like a similar story for this year, too.



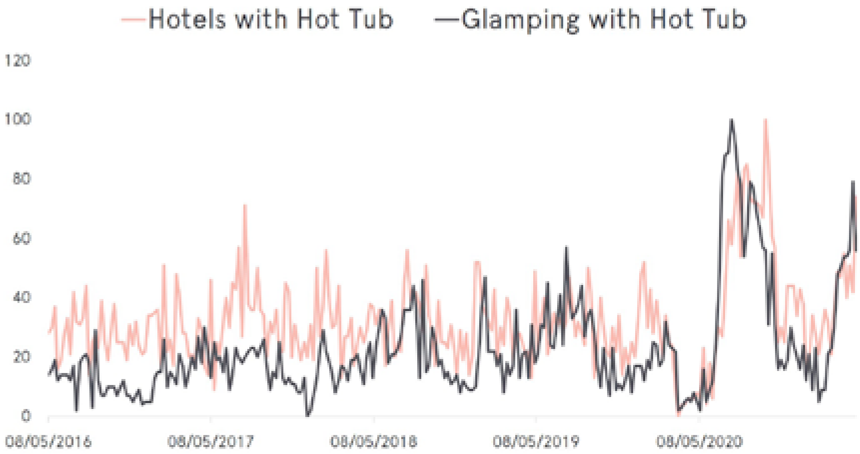


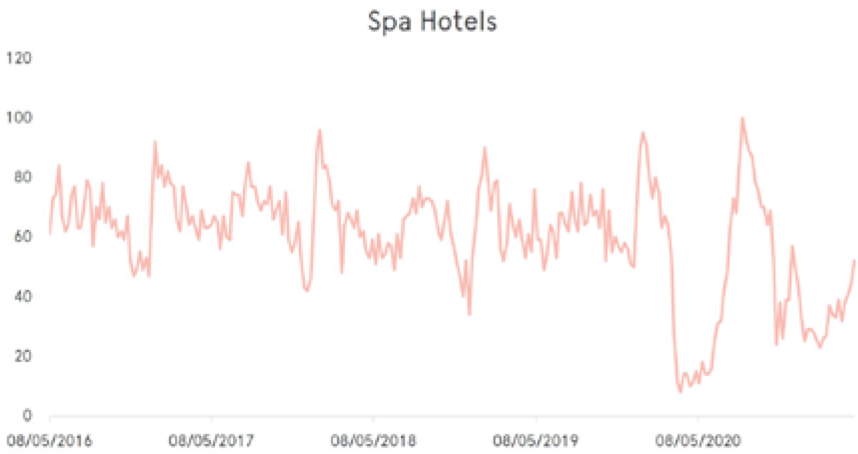
People are seeking ultimate relaxation.

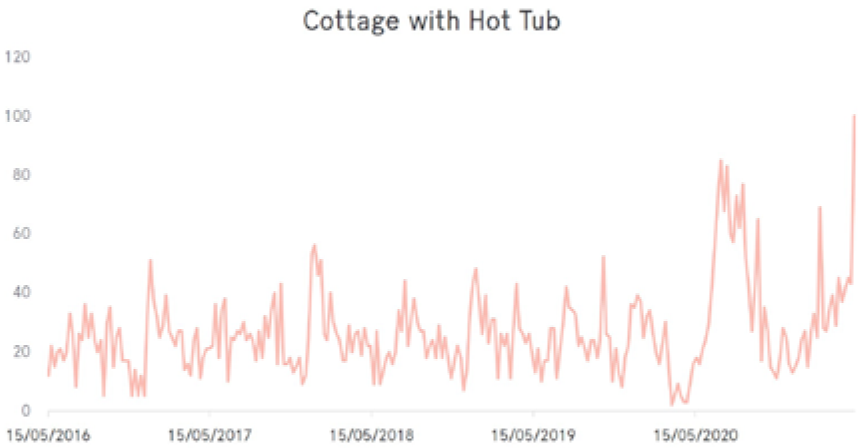
With many forced to swap their holidays abroad for a staycation, they want to make them extra special. In a tough time for everyone, as well as some not spending as much holidaying in the UK as they would abroad, many are choosing to upgrade to total luxury.

Research has shown that those working in the past year have felt mentally exhausted and burned out, mainly because of blurred lines between work and home life.

One study found that workers are working an average of two hours longer per day. Perhaps then, this is why holiday searches for "hot tubs" and "spa hotels" are on the rise.







Key Takeaways for Brands in this Sector.

1. Give your audience what they want.

From the brands analysed, it's clear that those winning in their markets have catered for what the audience wants from their site. Make sure content is easy to find and well categorised, and don't be afraid to be really granular with your navigation, if it makes it easier for the user to find what they're looking for.

2. If you're niche, be niche.

Whilst the big multi-line retailer brands often dominate in terms of overall visibility, there is huge potential for the niche brands to own the relevant rankings. Cater to your specialist knowledge and you'll be visible and useful to relevant searchers.

3. Feed trends into your activity.

Consumer behaviour and search trends are changing so frequently right now that it's imperative you or your agency has a process for monitoring them and feeding them into your activity. Whether that's creating a page on wild swimming or putting dog-friendly cottages front and centre of your user journey; whatever trends are relevant to your company and your audience – you need to be visible for.

Wolfenden

If you'd like any help with the above tips or you'd like us to review your niche sector in more detail to assess how you can gain more organic market share, drop us a note at the email address below and we'll give you a call to chat.

wolfenden.agency
hello@wolfenden.agency
0113 833 0239

Marketing
That Matters.