

# UK Travel NPS Survey: Summary of Findings<sup>1</sup>

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## 1. Introduction

In April 2007, The Listening Company surveyed British consumers (n=6,017) between the ages of 18 and 65 and asked them about their most recent travel experience. Recommendation likelihood ratings were obtained for the booking media (mostly travel agents), carriers (mostly airlines) and destinations (countries/regions), which allowed us to compute Net Promoter<sup>®2</sup> Scores.<sup>3</sup> In addition, respondents were asked to provide motivations for their booking choices, reasons for their recommendation scores, the costs of their trip, as well as basic demographic information.

The NPS travel survey shows that British consumers' travel experience represents itself a journey. It begins with the booking of a holiday, the actual trip from A to B, and finally their experience at the destination of choice. UK Net Promoter<sup>®</sup> Scores are lowest for carriers, highest for destinations and intermediate for booking media/agents.

Results suggest that, if people could mix and match, a holiday to Canada booked through Saga, with a flight operated by Emirates would be the most recommendable experience. Booking an Air France flight to Bulgaria on lastminute.com, on the other hand, would be the least desirable combination.

Our findings further show that bookings based on loyalty or existing familiarity that are done in person (through agencies directly) produce the highest NPS scores, while convenience-based bookings through the Internet have the lowest recommendation rates. Service reliability is particularly valued by UK travelers, as indicated by its effect on agent ratings.

Among carriers (the category suffering from the lowest NPS scores), recommendability seems to suffer the most from arrival/departure problems and poor facilities. For destinations, having accommodations that are not up to standards are most diagnostic of low NPS scores, while culture and sights/scenery make for highly recommended places. In some cases, carriers seem to suffer from a gap in recommendation rates between European and overseas flights. Taken together, overseas flights and destinations fare better than those within the UK or even Europe.

Finally, while spending more money on a holiday is associated with higher recommendation rates for agents, the same is not the case for carriers and destinations. People who have spent more on a trip tend to polarize into either NPS detractor or promoter camps for those categories.

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<sup>2</sup> Net Promoter is a registered trademark of Satmetrix Systems Inc., Bain & Company, and Fred Reichheld.

<sup>3</sup> NPS is based on the question 'How likely is it that you would recommend [Company X] to a friend or colleague?' with scaled responses between 0 (not at all likely) and 10 (extremely likely). The score is calculated as % promoters (9-10 on scale) MINUS % detractors (0-6 on scale). For statistical reasons, NPS was only calculated for companies and destinations that had at least 30 cases (representing about 0.5% of the sample size), as net score methodology does not allow for the computation of margins of error. Business travellers were not included in the analysis as they were too strongly underrepresented (3.5% of sample).

## 2.1 Net Promoter® Scores for Travel Agencies

The highest Net Promoter® Score among UK travel agents is enjoyed by Saga (NPS of 53), a specialist for travelers over the age of 50, followed by Dawson and Sanderson (48), as well as Trailfinders (41). At the bottom of the table are Shearings (NPS of 14), lastminute.com (3) and Eurostar (0).<sup>4</sup>

<b>Agent</b>	<b>NPS</b>
Saga	53
Dawson and Sanderson	48
Trailfinders	41
<i>Monarch</i>	40
Travelcare	40
Co-op	39
<i>Jet2</i>	36
Expedia	35
Portland	31
<i>Virgin</i>	29
<i>BA</i>	28
Direct Holidays	28
P&O	26
<i>BMI</i>	25
Hays Travel	25
Going Places	25
Thomas Cook	24
<i>easyJet</i>	23
Thomson	23
Lunn Polly	20
First Choice	19
<i>Ryanair</i>	17
My Travel	15
Shearings	14
lastminute.com	3
<i>Eurostar</i>	0
<b>Mean</b>	<b>27</b>

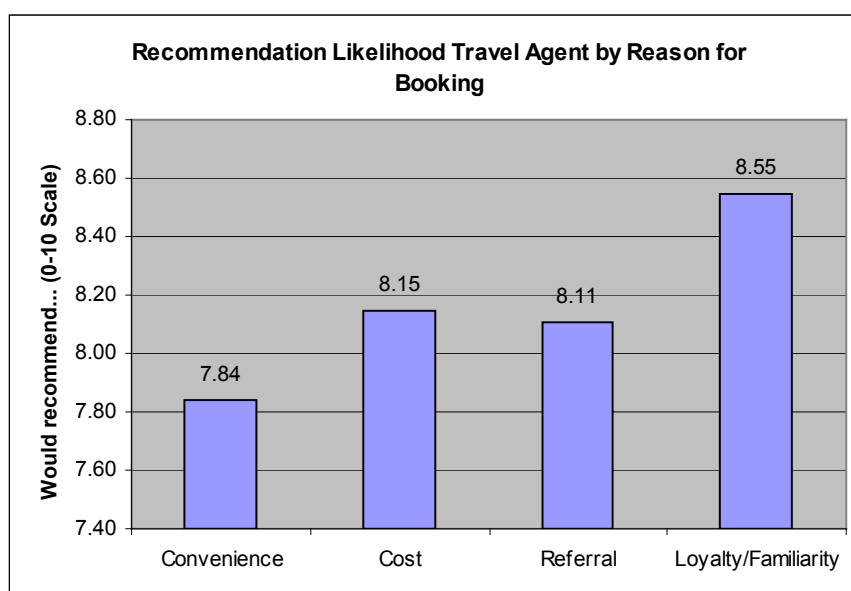
*Italics indicate agents that are primarily carriers that also have booking facilities*

<sup>4</sup> See Appendix 2 for means-based descriptive statistics.

## 2.2 Booking Motivations and Travel Agent NPS

The survey asked UK travelers why they had chosen a particular agent. The most commonly stated reason for booking with a particular agent was cost, including special deals, (n=1,768; 30.4%), followed by convenience, including ease of use, efficiency or location, (n=969; 16.7%), and loyalty/familiarity (n=948; 16.3%). 3.1% (n=182) indicated that their primary reason was a referral. (33.4% [n=1,941] did not provide a reason or could not be coded).

Respondents' likelihood of recommending a travel agent was lowest for convenience bookings (mean=7.84) and somewhat higher for a choice of agent based on cost (8.15) or a referral (8.11). Loyalty or existing familiarity with the agent is associated with the highest willingness to recommend (8.55).<sup>5</sup>



These differences are also reflected in travel agent NPS scores. Agencies dominated by convenience bookings, such as Going Places or lastminute.com, suffer from lower NPS scores overall (average NPS of 13) than cost (26) or high loyalty/familiarity types of agencies (35).

<sup>5</sup> These differences are significant ( $p < .001$ ) overall based on ANOVA test statistics, but convenience-referral and cost-referral contrasts are not significant.

## Net Promoter® Scores for Convenience, Cost and Loyalty/Familiarity Bookings

<u>Convenience* (%)</u>	<u>NPS</u>	<u>Cost* (%)</u>	<u>NPS</u>	<u>Loyalty/Familiarity* (%)</u>	<u>NPS</u>
P&O (44%)	26	<i>Monarch (58%)</i>	40	Saga (74%)	53
Going Places (43%)	25	<i>Jet2 (65%)</i>	36	Dawson & Sanderson (67%)	48
lastminute.com (31%)	3	Expedia (44%)	35	Trailfinders (53%)	41
<i>Eurostar (73%)</i>	0	Portland (42%)	31	Travelcare (51%)	40
		<i>British Airways (34%)</i>	28	Co-op (43%)	39
		Direct Holidays (78%)	28	<i>Virgin (55%)</i>	29
		<i>BMI (72%)</i>	25	Lunn Polly (63%)	20
		Hays Travel (41%)	25	Shearings (53%)	14
		Thomas Cook (39%)	24		
		<i>easyJet (67%)</i>	23		
		Thomson (40%)	23		
		First Choice (48%)	19		
		<i>Ryanair (64%)</i>	17		
		My Travel (74%)	15		
<b>Mean</b>	<b>13</b>	<b>Mean</b>	<b>26</b>	<b>Mean</b>	<b>35</b>

\*Note: classification is based on booking motivation with highest proportion for each booking agent/medium

### 2.3 Booking Media and NPS: The Human Factor

43.9% (n=2,434) of UK travelers indicated that they booked their trip or holiday online and another 40.1% (n=2,221) in person through agencies. The remainder of bookings was done over the telephone (n=885; 16.0%). There is noticeable variation in NPS scores across travel agencies depending on the medium through which customers book their trip or holiday. Generally, Internet-driven agencies (mostly composed of carriers with an online booking system) fare worst (average NPS of 22); mixed media are intermediate (26), while agency-driven companies have the highest average NPS (33).

## Net Promoter<sup>®</sup> Scores for Internet, Agency and Mixed Media Travel Agents

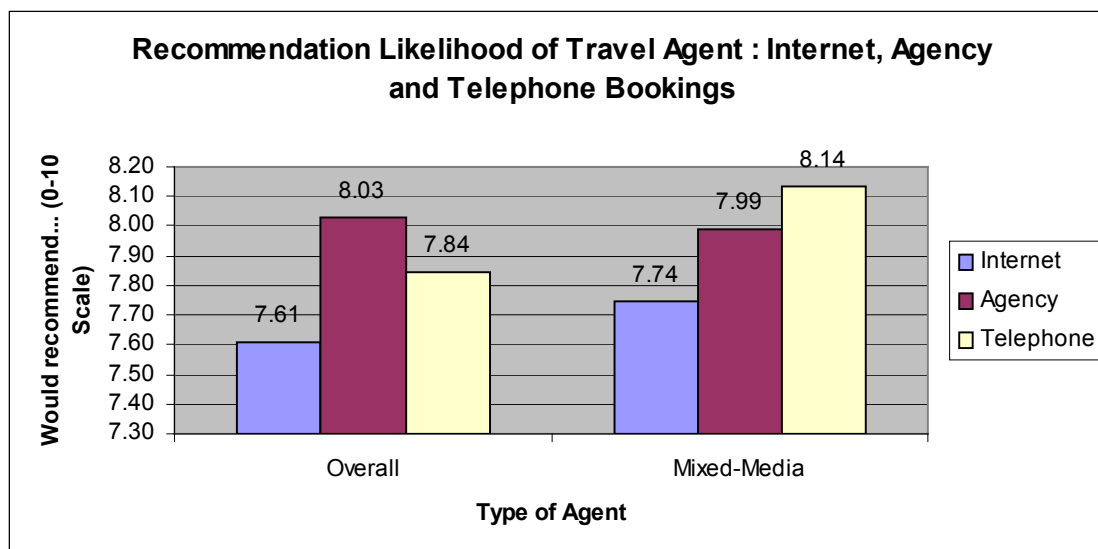
Internet-driven*		Mixed media		Agency-driven**	
<i>Monarch</i>	40	Saga	53	Dawson & Sanderson	48
<i>Jet2</i>	36	Portland	31	Trailfinders	41
<i>Virgin</i>	29	Direct Holidays	28	Travelcare	40
<i>BA</i>	28	P&O	26	Co-op	39
<i>BMI</i>	25	Thomson	23	Going Places	25
<i>easyJet</i>	23	First Choice	19	Hays Travel	25
<i>Ryanair</i>	17	My Travel	15	Thomas Cook	24
<i>lastminute.com</i>	3	Shearings	14	Lunn Polly	20
<i>Eurostar</i>	0				
<b>Mean internet</b>	<b>22</b>	<b>Mean mixed media</b>	<b>26</b>	<b>Mean agency</b>	<b>33</b>

*Italics indicate agents that are primarily carriers with booking facilities*

\* 2/3 or more of respondents indicating Internet booking

\*\* 2/3 or more of respondents indicating agency booking

Do Internet-based agencies provide a worse service or experience than those conducting business primarily in settings where customers can interact with agents in person? Or is there something about the booking medium itself that influences recommendability? In an attempt to answer those questions, mixed media agencies were analyzed separately. It was found that the Internet booking again suffered from the lowest recommendation likelihood (n=282; mean=7.74), but telephone bookings (n=133; 8.14) were slightly ahead of agency bookings (n=511; 7.99).<sup>6</sup>



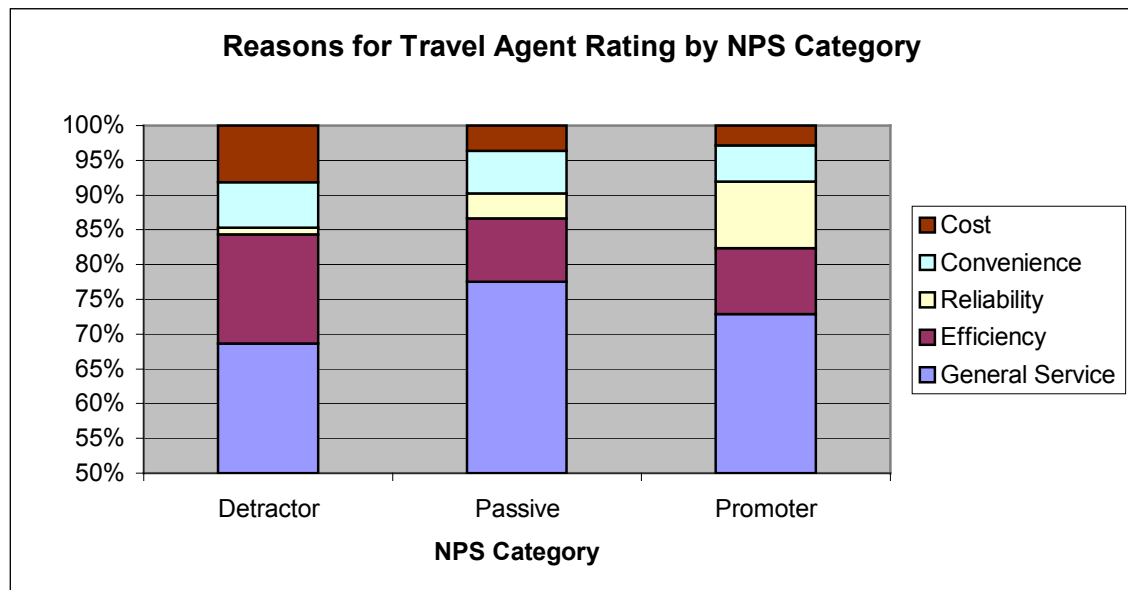
<sup>6</sup> These differences are significant (p<.05) overall based on ANOVA test statistics, but telephone-agency contrasts are not significant.

## 2.4 Reasons for Travel Agent Recommendations

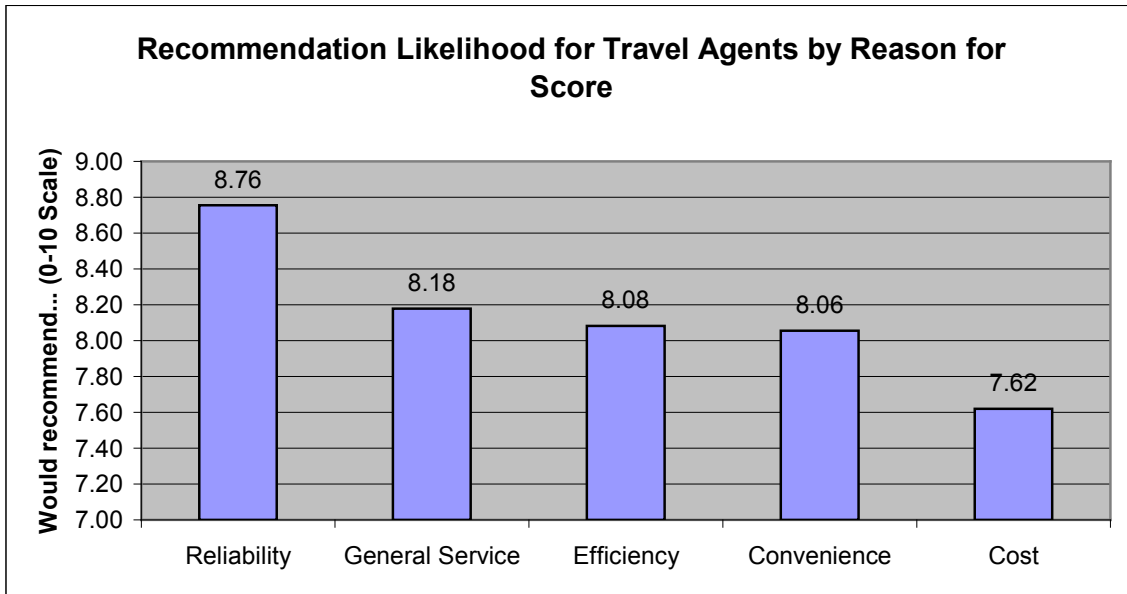
Respondents were asked to state a reason for their travel agent recommendation score. The main reason given was general service, followed by efficiency and reliability, and finally convenience and cost. Detractors, however, were more likely to state issues to do with efficiency and cost to explain their low ratings. Travellers who mentioned reliability gave the highest recommendation scores.<sup>7</sup>

### Reasons for Travel Agent Rating (%) by NPS Category

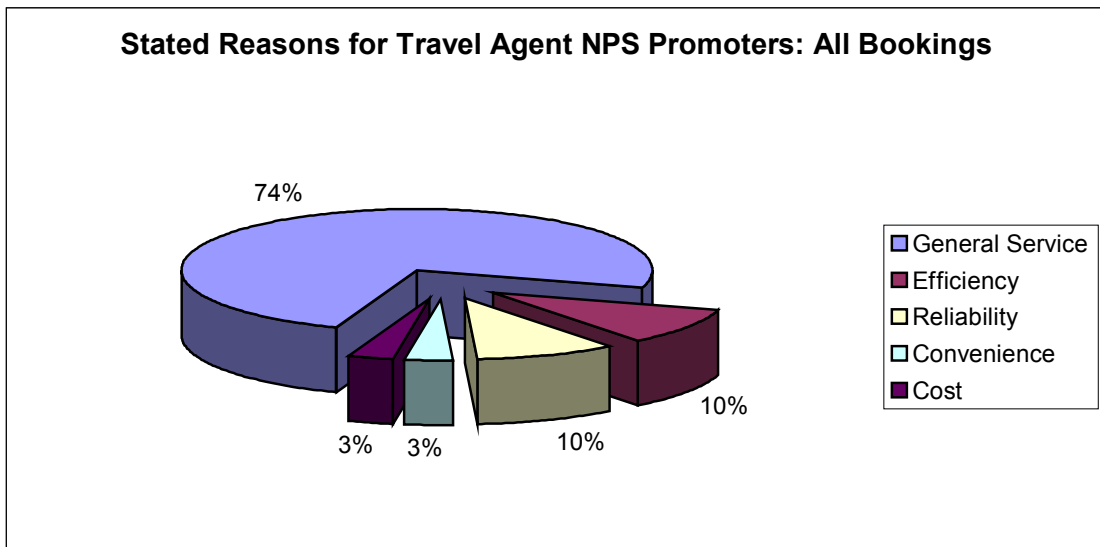
Reason	Detractor (n=626)	Passive (n=2,572)	Promoter (n=1,790)
General Service	68.6	77.5	72.8
Efficiency	15.7	9.2	9.5
Reliability	1.0	3.6	9.5
Convenience	6.5	6.1	5.2
Cost	8.2	3.7	2.9
Total	100.0	100.0	100.0



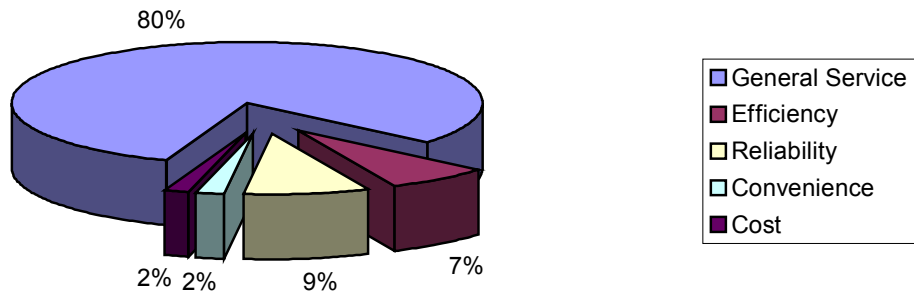
<sup>7</sup> Differences between NPS categories are significant ( $p < .001$ ) based on Chi-Square tests.



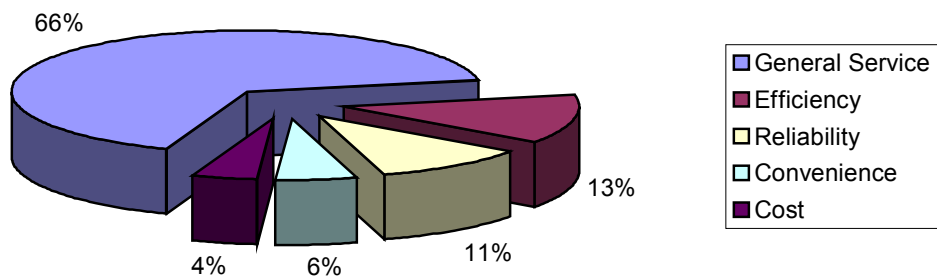
Looking at bookings through different media separately, it became evident that the relative importance of efficiency and convenience played a greater role for Internet-based experiences. Reliability was most emphasized by telephone customers. Service overall ranged in importance depending on the degree of human contact: 80% for (face-to-face) agency, 74% for telephone (voice-to-voice) and 66% for Internet bookings.



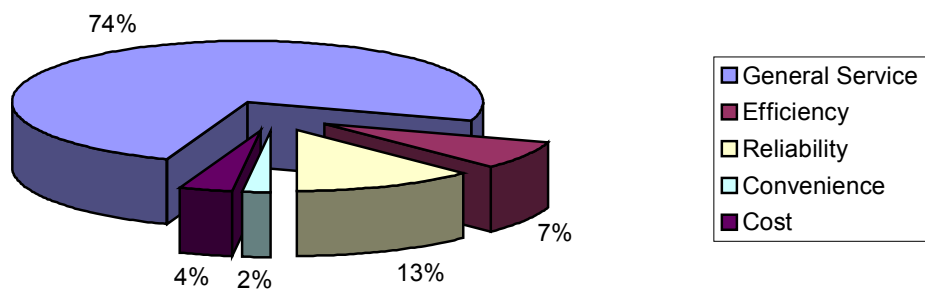
**Stated Reasons for Travel Agent NPS Promoters: Agency Bookings**



**Stated Reasons for Travel Agent NPS Promoters: Internet Bookings**



**Stated Reasons for Travel Agent NPS Promoters: Telephone Bookings**



### 3.1 Net Promoter® Scores for Carriers

Compared to travel agents, carriers' Net Promoter® Scores were almost 20 points lower. According to the scores, Emirates airline and P&O (NPS of 32) provide the most highly recommended experience to travelers. Virgin (27) also ranks among the top three. Air France (NPS of -22), BMI (-14) and Ryanair (-5) appear to disappoint travelers the most and find themselves at the bottom of the NPS league table.<sup>8</sup>

<b>Carrier</b>	<b>NPS</b>
Emirates	32
P&O	32
Virgin	27
Flybe	25
Eurostar	23
Thomson	17
American Airlines	16
Britannia	16
Jet2	14
KLM	12
Cyprus Airways	12
First Choice	12
British Airways	11
Thomas Cook	11
Shearings	9
easyJet	8
Air Tours	4
Monarch	1
My Travel	-1
BMI Baby	-3
Excel	-4
Ryanair	-5
BMI	-14
Air France	-22
<b>Mean</b>	<b>9</b>

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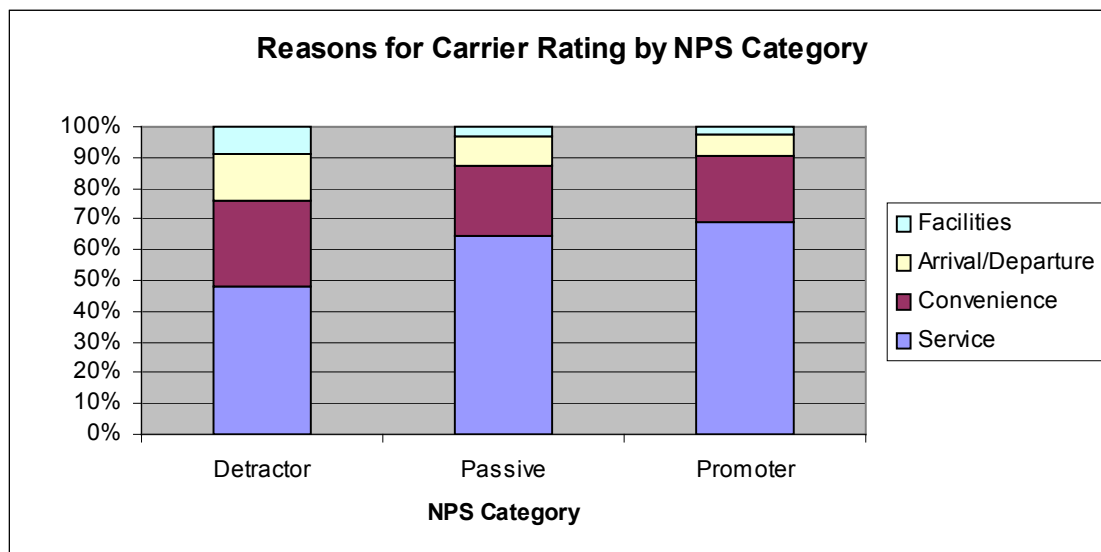
<sup>8</sup> See Appendix 2 for means-based descriptive statistics.

### 3.2 Reasons for Carrier Recommendations

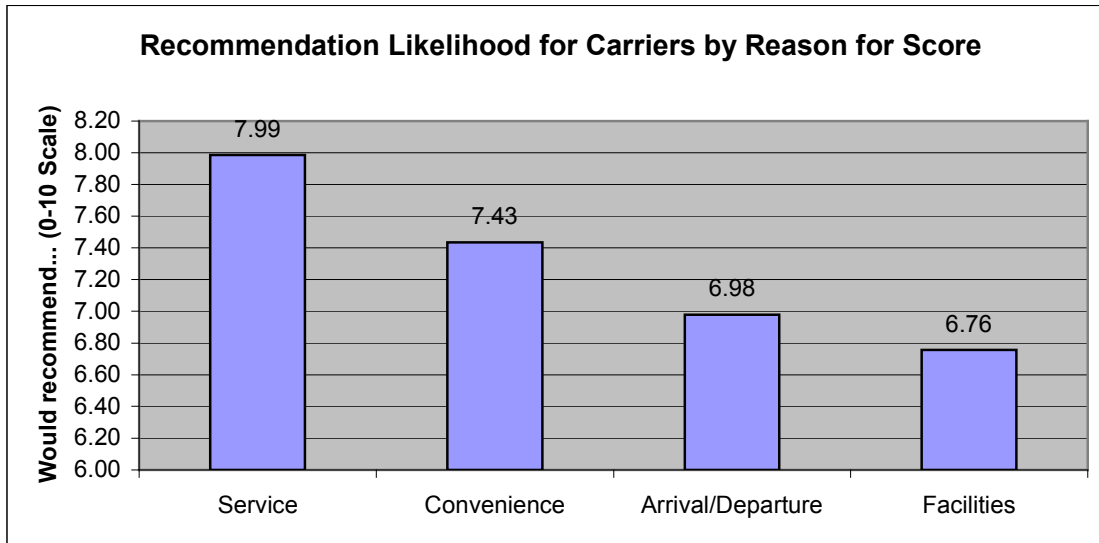
Results indicate that providing a superior service is key to generating promoters of carriers. The importance of convenience, arrival/departures (including delays) and facilities related issues are highlighted by travellers who can be categorized as NPS detractors. The lowest average scores are given by travellers who mention facilities as the reason for their rating.<sup>9</sup>

**Reasons for Carrier Rating (%) by NPS Category**

<i>Reason</i>	<i>Detractor (n=1,057)</i>	<i>Passive (n=2,608)</i>	<i>Promoter (n=1,460)</i>
Service	48.1	64.5	69.0
Convenience	28.0	22.8	21.8
Arrival/Departure	15.2	9.2	6.9
Facilities	8.7	3.4	2.3
Total	100.0	100.0	100.0



<sup>9</sup> Differences between NPS categories are significant ( $p < .001$ ) based on Chi-Square tests.



#### 4.1 Net Promoter® Scores for Destinations

UK consumers' recommendation likelihoods for travel destinations produce exceptionally high Net Promoter® Scores overall. Canada has the highest NPS (89), followed by Australia (82) and Switzerland (76). Bulgaria (NPS of 19), the Dominican Republic (28) and Tunisia (32) are countries with the lowest NPS scores.<sup>10</sup>

<u>Destination</u>	<u>NPS</u>
Canada	89
Australia	82
Switzerland	76
Austria	71
South Africa	70
USA	69
Czech Republic	65
India	61
Thailand	61
France	56
Germany	54
Netherlands	54
Portugal	54
Italy	52
Turkey	51
Ireland	50

<sup>10</sup> See Appendix 2 for means-based descriptive statistics.

Cyprus	48
Greece	47
UK	46
Egypt	44
Spain	39
Tunisia	32
Dominican Republic	28
Bulgaria	19
<b>Mean</b>	<b>55</b>

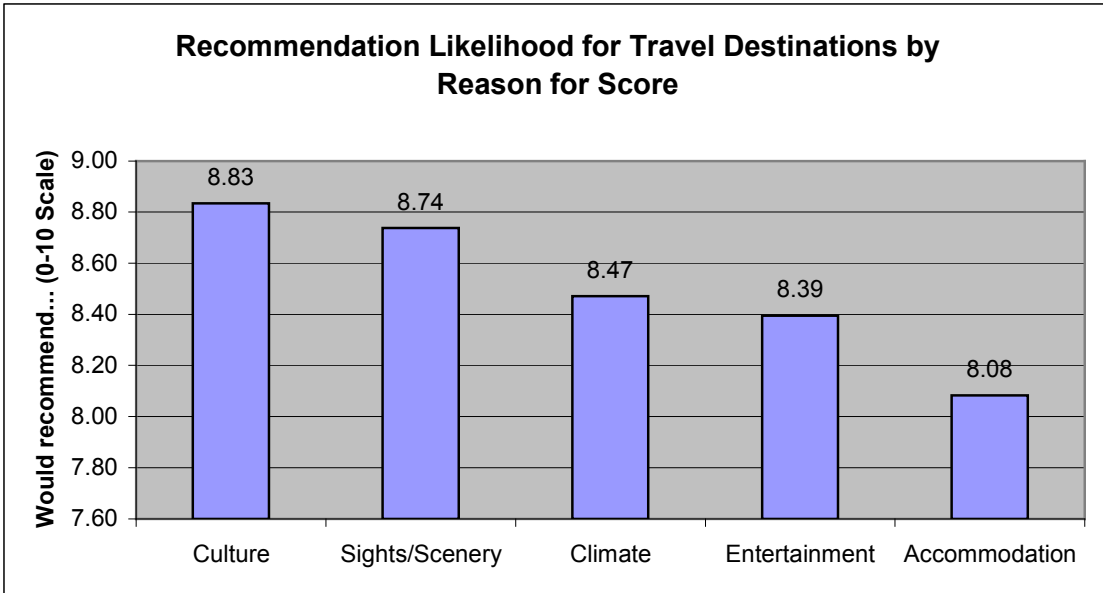
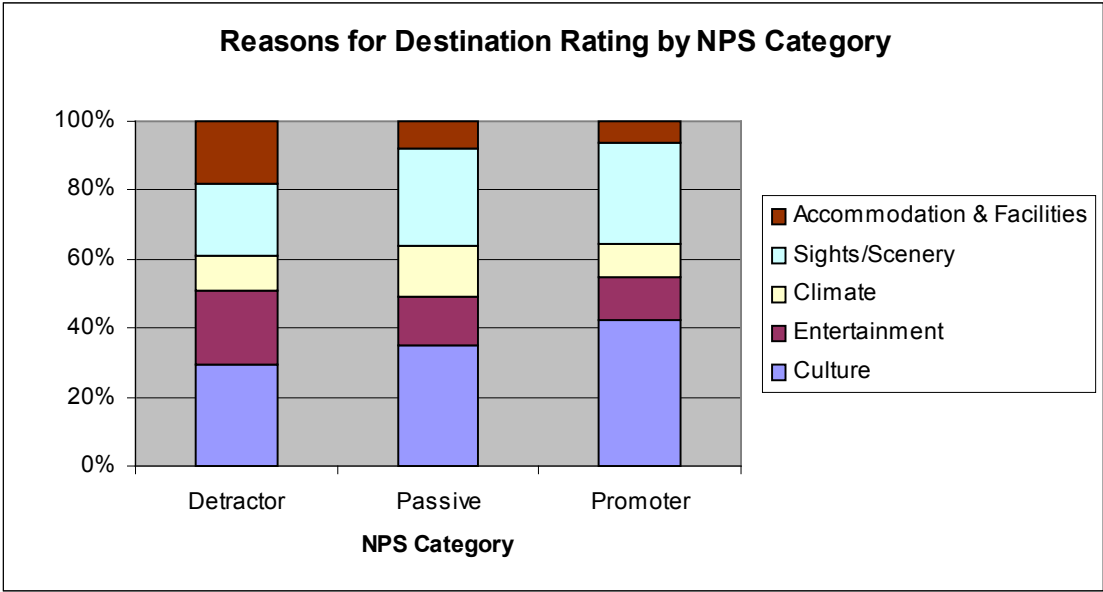
## 4.2 Reasons for Destination Recommendations

Culture and sights/scenery are the most commonly mentioned reasons for high recommendation scores of travel destinations. Entertainment and accommodation/facilities issues, by contrast, dominate reasons to become a detractor. The lowest average recommendations are among respondents who state accommodation issues as a reason for their score.<sup>11</sup>

### Reasons for Travel Destination Rating (%) by NPS Category

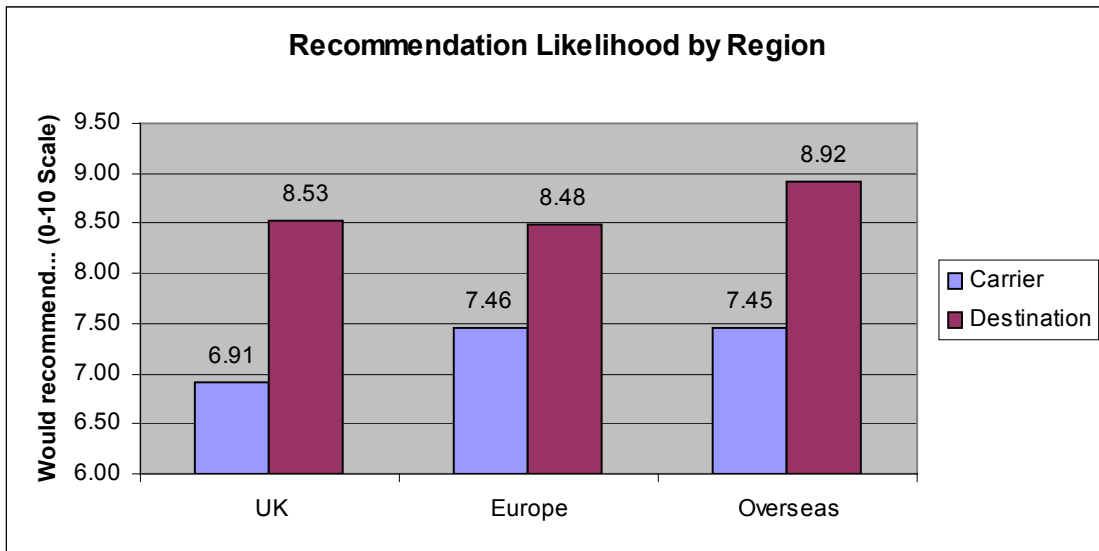
<i>Reason</i>	<i>Detractor (n=473)</i>	<i>Passive (n=1,834)</i>	<i>Promoter (n=3,322)</i>
Culture	29.6	35.1	42.2
Entertainment	21.2	14.2	12.4
Climate	10.4	14.4	9.7
Sights/Scenery	20.9	28.1	29.2
Accommodation & Facilities	17.9	8.2	6.4
Total	100.0	100.0	100.0

<sup>11</sup> Differences between NPS categories are significant ( $p < .001$ ) based on Chi-Square tests.

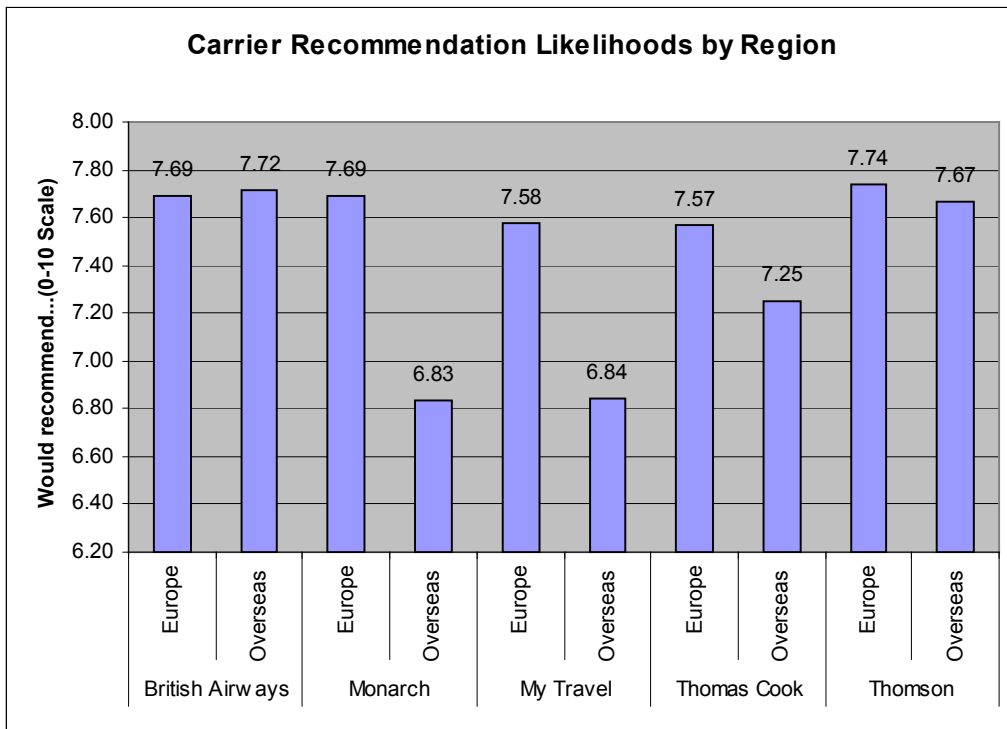


## 5.1 Carrier and Destination Recommendations by Region

The survey data show that overseas travel has the largest recommendation scores for carriers and destinations – travel within the UK the lowest.



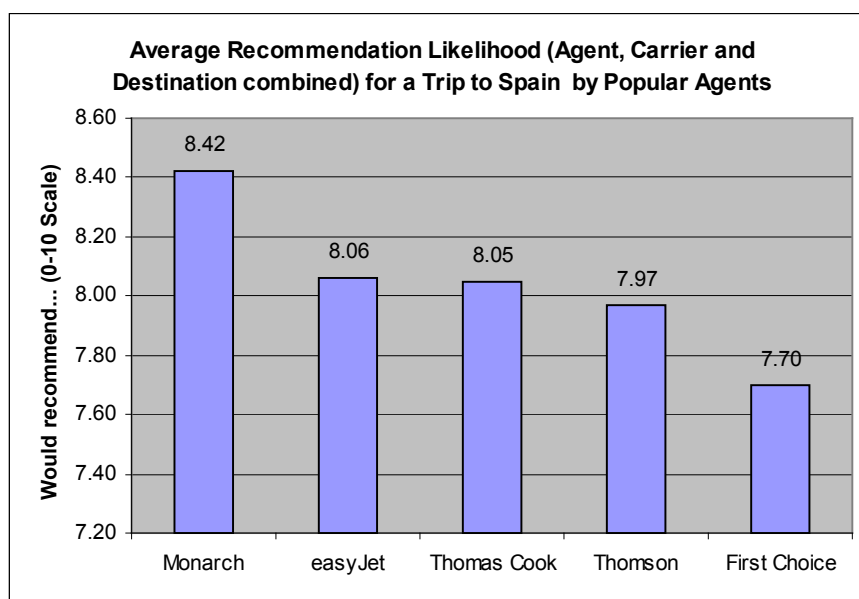
For some of the most popular carriers that fly within Europe and overseas, however, a 'region gap' becomes evident in recommendation scores. More specifically, travellers on Monarch (n=202) and My Travel (n=124) have a significantly lower likelihood to recommend their experience if the trip is to an overseas destination.<sup>12</sup>



<sup>12</sup> Independent sample t-tests indicate a more significant regional difference for Monarch ( $p < .01$ ) than My Travel ( $p < .10$ )

## 5.2 A Holiday in Spain

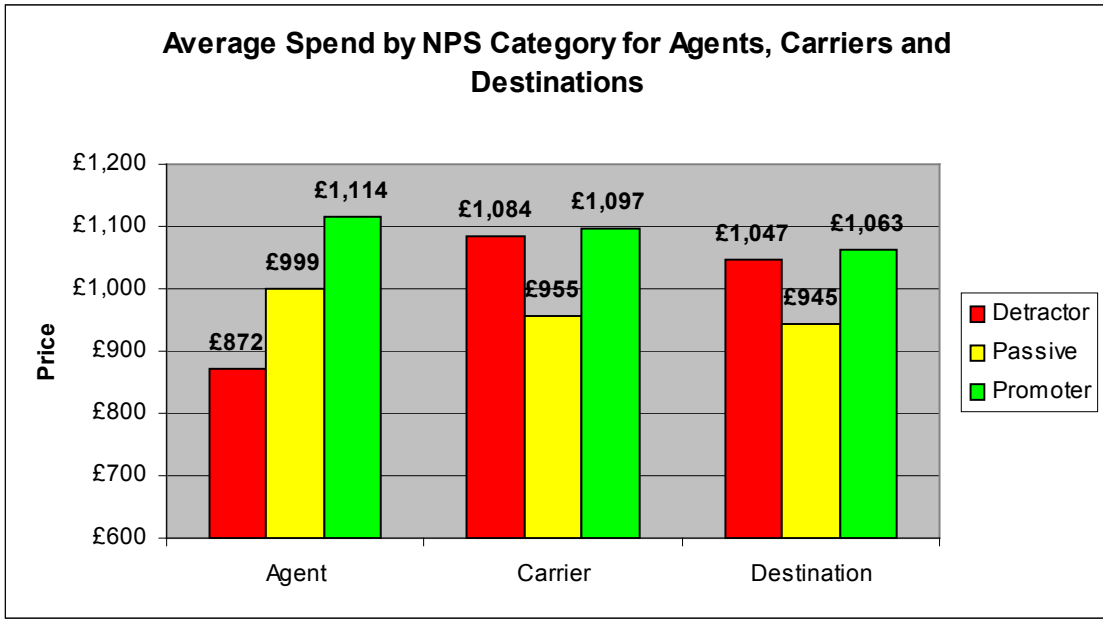
Spain turned out to be the most popular country in this survey, with about 24% of all respondents citing the country as their destination of choice. Due to the high number of travellers to this area, it was possible to have a closer look at the overall experience of holidays in Spain. More specifically, an overall recommendation score (based on agent, carrier and destination recommendations) was computed for the most popular companies that provide both booking and transportation services. Monarch stood out as providing the most recommended experience, followed by easyJet, Thomas Cook and Thomson with similar average scores. The lowest recommendation rates were found for First Choice.



## 5.3. Price and Recommendations

On average, the UK travellers surveyed spent £966 on their holiday. Does a higher price tag buy a more recommendable holiday experience? The results of our UK travel data suggest that this is not reflected in recommendation likelihood ratings. For carriers and destinations, detractors, but not passives, report similar average prices for their holidays. However, for travel agents, greater recommendation scores are associated with higher prices.<sup>13</sup>

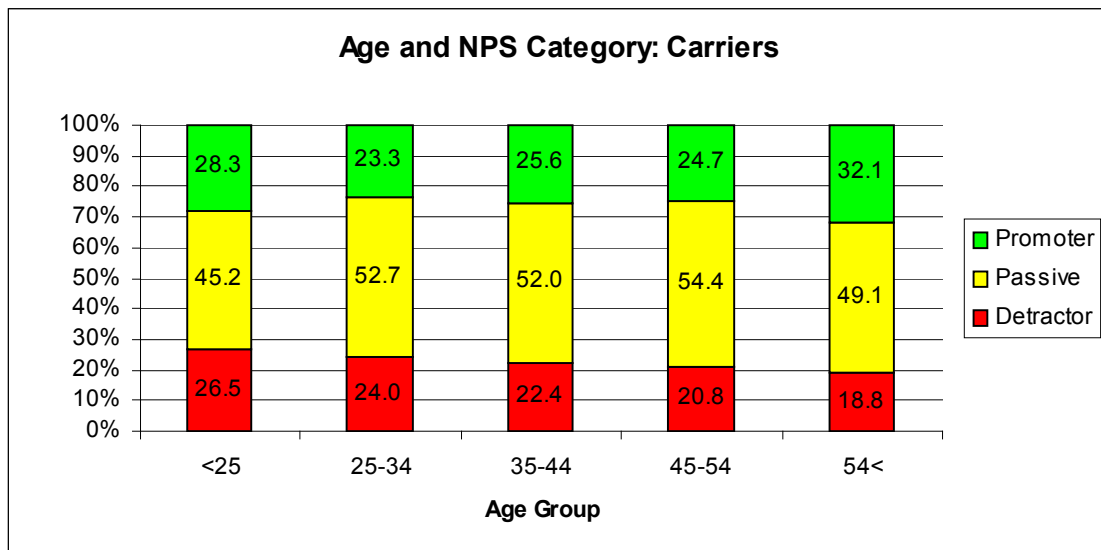
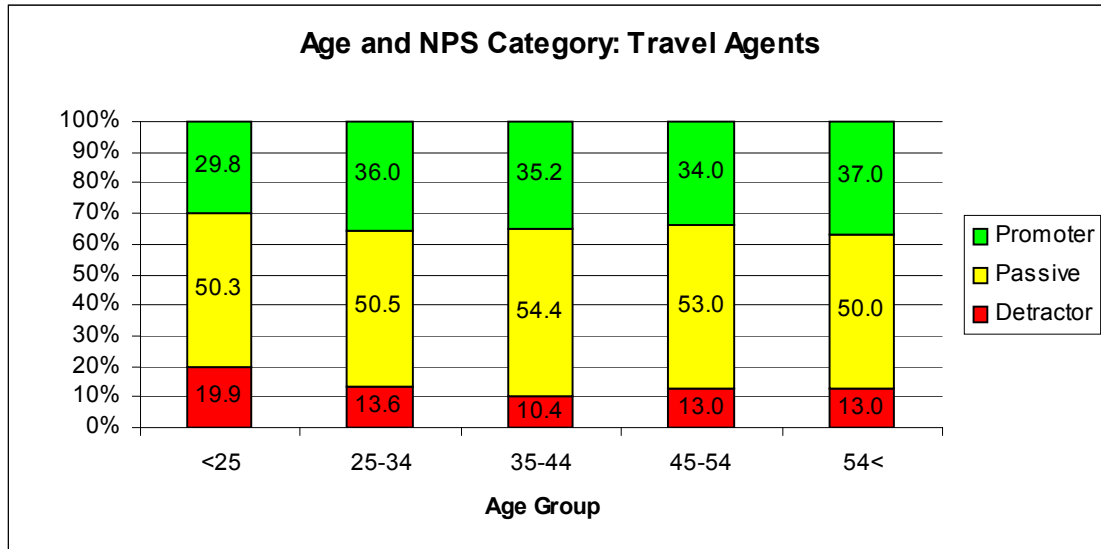
<sup>13</sup> Differences between NPS categories are significant ( $p < .01$ ) based on ANOVA test statistics.

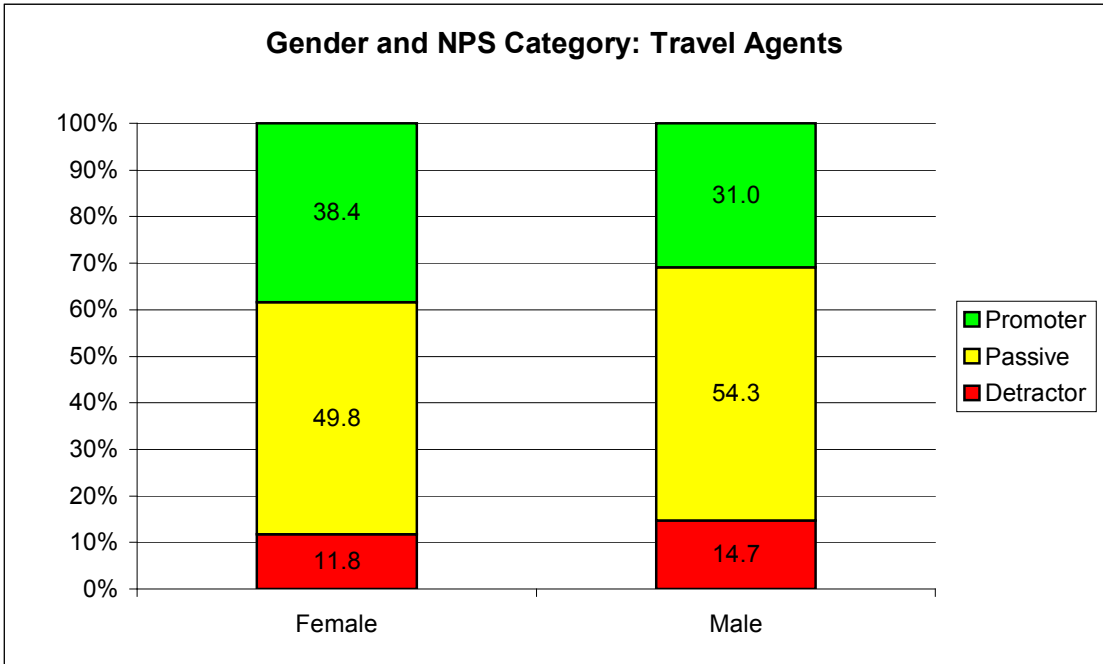
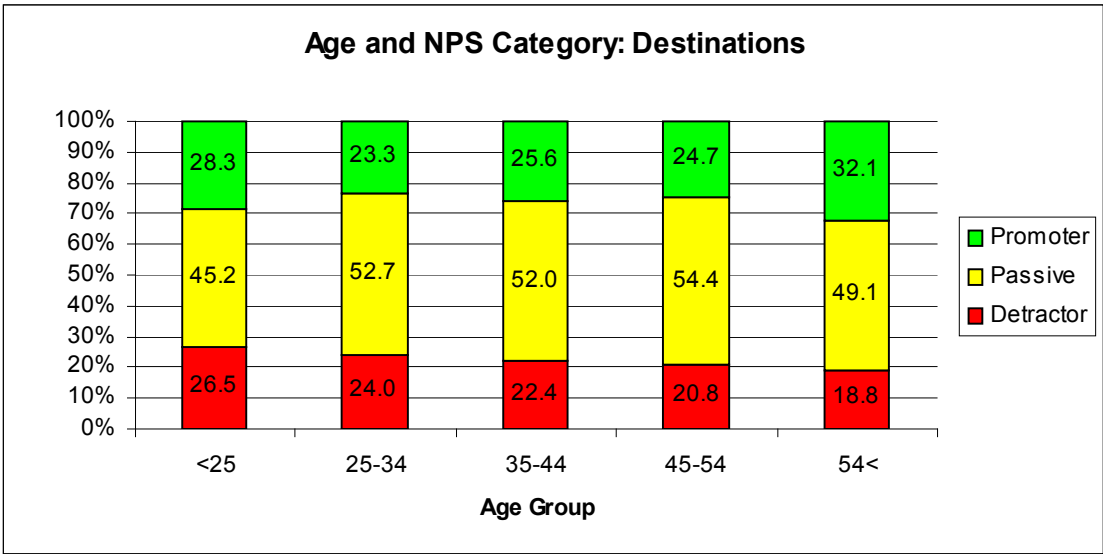


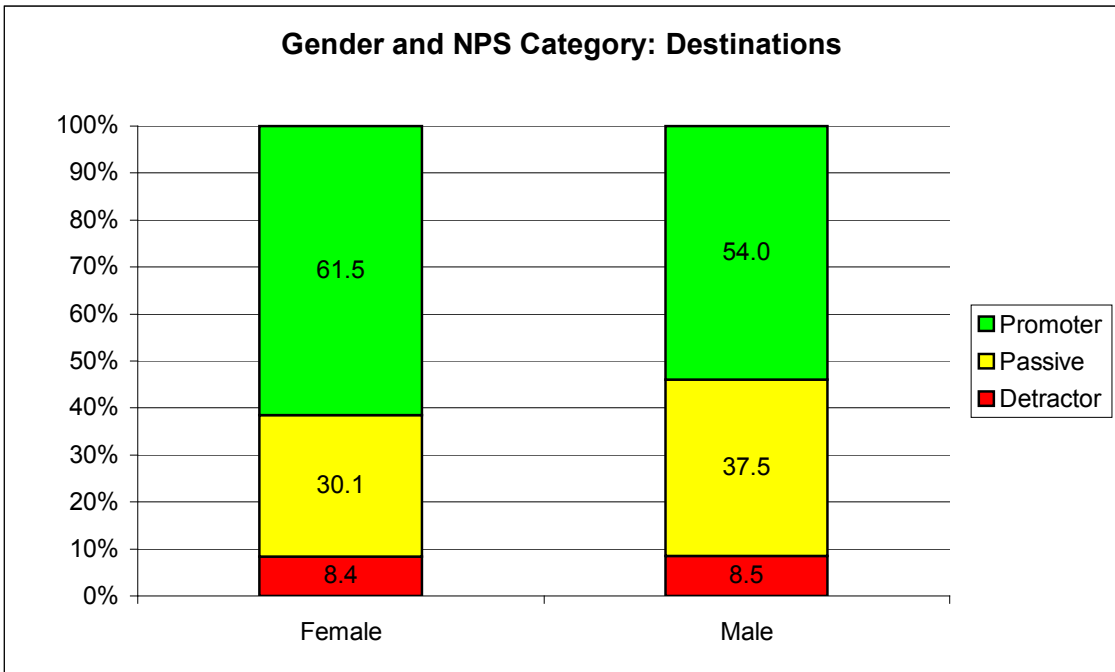
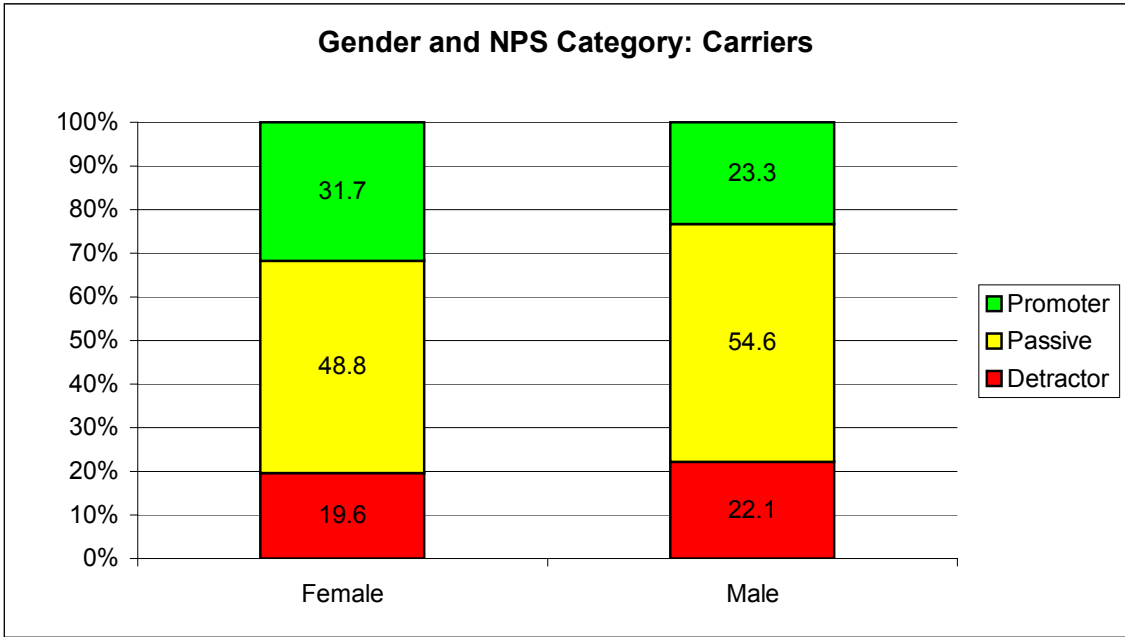
## 6. Interpretations and Implications

For questions, detailed analyses or comments/insights relating to the UK Travel NPS Survey, please contact Dr. Alain Samson, [a.samson@lse.ac.uk](mailto:a.samson@lse.ac.uk), or Neville Upton, [NevilleUpton@Listening.co.uk](mailto:NevilleUpton@Listening.co.uk)

## Appendix 1: Demographic Factors and Recommendations







## Appendix 2: Descriptive Statistics

<b>Gender</b>	<b>n</b>	<b>Percent</b>
Female	3574	61.54
Male	2043	35.18
Unknown	191	3.29
<i>Total</i>	<i>5808</i>	<i>100.00</i>

<b>Other</b>	<b>n</b>	<b>Mean</b>	<b>Std. Error</b>	<b>Std. Dev.</b>
Age	5631	53.18	0.199	14.91
Price	5444	966.12	15.602	1151.16

### Descriptive Statistics: Travel Agents

<b>Agent</b>	<b>n</b>	<b>Mean</b>	<b>Std. Error</b>	<b>Std. Dev.</b>
Thomson	541	7.88	0.075	1.75
Thomas Cook	392	7.97	0.089	1.76
easyJet	277	8.18	0.310	5.16
First Choice	165	7.85	0.124	1.59
Co-op	127	8.44	0.129	1.45
Going Places	122	8.07	0.107	1.19
Ryanair	112	7.88	0.126	1.33
British Airways	106	8.02	0.149	1.54
Expedia	102	8.21	0.137	1.38
Dawson and Sanderson	101	8.46	0.192	1.93
Hays Travel	69	7.93	0.239	1.99
lastminute.com	67	7.40	0.211	1.72
Travelcare	55	8.33	0.184	1.36
Virgin	52	7.94	0.275	1.98
Monarch	42	8.45	0.178	1.15
Shearings	42	7.90	0.152	0.98
Direct Holidays	39	8.00	0.366	2.28
P&O	38	8.24	0.194	1.20
Saga	38	8.63	0.153	0.94
Jet2	36	8.28	0.152	0.91
Portland	36	8.22	0.222	1.33
My Travel	34	7.53	0.361	2.11
Trailfinders	34	8.38	0.215	1.26
BMI	32	7.91	0.306	1.73
Lunn Polly	30	7.90	0.340	1.86
Eurostar	24	7.38	0.403	1.97
Unknown & other	2276	7.48	0.057	2.71
<i>Total</i>	<i>4989</i>	<i>8.03</i>	<i>0.202</i>	<i>1.73</i>

**Descriptive Statistics: Carriers**

<b>Carrier</b>	<b>n</b>	<b>Mean</b>	<b>Std. Error</b>	<b>Std. Dev.</b>
easyJet	613	7.54	0.064	1.58
Thomson	568	7.73	0.077	1.83
British Airways	446	7.67	0.080	1.68
Thomas Cook	269	7.54	0.109	1.79
Ryanair	254	7.12	0.128	2.04
Monarch	221	7.43	0.121	1.80
First Choice	170	7.62	0.130	1.69
My Travel	130	7.33	0.164	1.87
Virgin	128	7.98	0.157	1.78
Excel	116	7.09	0.214	2.31
P&O	104	8.15	0.145	1.48
KLM	74	7.65	0.221	1.90
BMI Baby	68	7.37	0.220	1.81
Jet2	65	7.80	0.176	1.42
Air Tours	57	7.51	0.245	1.85
Eurostar	52	8.02	0.214	1.54
American Airlines	50	7.80	0.244	1.73
Emirates	50	8.18	0.182	1.29
Cyprus Airways	42	7.81	0.216	1.40
BMI	36	7.22	0.296	1.77
Shearings	34	7.91	0.148	0.87
Air France	32	6.47	0.484	2.74
Britannia	32	7.78	0.219	1.24
Flybe	32	8.03	0.316	1.79
Unknown & other	1482	7.12	0.065	2.51
<b>Total</b>	<b>5125</b>	<b>7.59</b>	<b>0.185</b>	<b>1.75</b>

### Descriptive Statistics: Destinations

<b>Destination</b>	<b>n</b>	<b>Mean</b>	<b>Std. Error</b>	<b>Std. Dev.</b>
Spain	1380	8.30	0.046	1.71
UK	569	8.53	0.058	1.39
France	366	8.73	0.063	1.20
USA	343	9.07	0.064	1.19
Italy	321	8.57	0.094	1.69
Greece	315	8.49	0.090	1.60
Turkey	203	8.59	0.107	1.53
Cyprus	192	8.49	0.117	1.63
Portugal	155	8.70	0.101	1.26
Ireland	109	8.65	0.129	1.35
Egypt	87	8.30	0.238	2.22
Australia	74	9.46	0.113	0.97
Canada	72	9.38	0.089	0.76
Netherlands	63	8.65	0.157	1.25
Germany	61	8.74	0.155	1.21
Bulgaria	47	7.74	0.283	1.94
India	46	8.83	0.237	1.61
Switzerland	45	9.09	0.138	0.92
South Africa	44	9.05	0.243	1.61
Austria	38	8.84	0.260	1.60
Thailand	38	8.95	0.199	1.23
Tunisia	37	7.81	0.402	2.45
Dominican Republic	32	7.88	0.383	2.17
Czech Republic	31	9.03	0.225	1.25
Unknown & other	962	8.78	0.107	3.32
<i>Total</i>	<i>5630</i>	<i>8.67</i>	<i>0.164</i>	<i>1.56</i>