The path to purchase

Uncovering how travellers plan and book online
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Methodology and about Expedia Group
It broadens horizons, bridges divides and opens up the world. At Expedia Group, we power global travel for everyone, everywhere. This starts with a deep understanding of travellers across the globe. To do that, we draw from our wealth of trip search and booking data—encompassing the 6.5 million visitors on average to our traveller apps and experiences each day and the custom research we conduct every year.

Across the travel industry, one of the most requested research topics is the traveller path to purchase. The digital landscape and travel industry are increasingly fragmented, online content consumption continues to rise and the touchpoints for traveller influence and engagement seem endless. The way people are inspired to travel, research and book trips has changed in recent years, along with the content that influences their travel decisions. Travel industry professionals like you want to know: What inspires travellers to take a trip? How much time are travellers spending with online travel content and what is influencing travellers’ decisions? What, where and how do we need to show up to have the most impact?

To explore these questions and uncover the myriad opportunities in the traveller path to purchase, we’ve partnered with Luth Research to conduct a digital study and consumer survey in seven countries around the world: Australia, Canada, France, Japan, Mexico, the UK and US.

The aggregated research findings reveal traveller preferences and behaviours throughout the online shopping journey, and illustrate where and how they plan and book travel. From typical travel website visits and page views to destination considerations, resources and influences at every stage, this research provides actionable insights to help you reach, inspire, engage and convert travellers during their path to purchase.
The path to purchase study includes:

**Digital data**
Luth digital data tracked and evaluated traveller behaviour in the 45 days before a trip booking.
- 70,000+ digital data panel.
- Based on those who booked travel within the last 12 months.

**Survey data**
Luth issued a survey asking about motivations and influences driving a recent trip.
- 5,713 survey respondents.
- Based on those who booked travel within the last six months.

Online travel resource categories (web and app) in the survey and digital study

- Airline (e.g. Delta, Lufthansa)
- Car (e.g. Avis, Hertz)
- Destination website or DMO (e.g. Tourism Panama, Visit California)
- Financial services (e.g. Affirm, Mastercard, PayPal)
- Hotel (e.g. Accor, Marriott, Hilton)
- Meta travel websites (e.g. Google Flights, Kayak, Tripadvisor)
- Online travel agency or OTA (e.g. Costco Travel, Expedia, Hotels.com)
- Search engines (e.g. Bing, Google)
- Social media (e.g. Instagram, TikTok)
- Train/rail (e.g. Amtrak)
- Travel media (e.g. Travel + Leisure)
- Holiday rentals (e.g. Airbnb, Vrbo, Vacasa)

Note: In the digital study, holiday rentals are included in the OTA resource category. In the consumer survey, OTAs and holiday rentals are separate resource categories.
Travel content consumption

Digital landscape

The typical consumer spends hours online each day working, shopping, scrolling through social media and more. But how much time is actually spent with travel content before a purchase? And what resources are used while planning a trip?

To better understand travellers’ complex online behaviour leading up to a travel purchase, insights from the digital data panel provided a quantitative view of how much and what type of content travellers interact with throughout the booking journey.

On average across all seven countries, travellers view 141 pages of travel content in the 45 days prior to booking a trip—and as high as 277 pages for travellers in the US. These page views are distributed throughout their path to purchase.

When looking at the aggregate, research is more spread out and inconsistent in the early stages of planning, with approximately 2.5 page views per day. As travellers near their purchase date, page views increase slightly and then increase exponentially in the few days prior to a booking, ending with 25 page views on the day of purchase.

The content of these page views span across various website categories with online travel agencies (OTAs) accounting for nearly half of these page views (67 pages), followed by airline websites (33 pages), hotel websites (16 pages) and meta travel websites (16 pages).

Looking at the percentage of travellers that use each resource—or website category—in the 45 days leading up to their purchase, OTAs, search engines, social media, airline websites and meta travel websites are used by most travellers.

Furthermore, four in five travellers visit an OTA at some point before making a travel purchase, indicating that even if travellers ultimately book on another website, they likely visited an OTA for inspiration, research or planning purposes.

Travellers spend an extensive amount of time with travel content during the 45 days prior to booking—303 minutes on average, or just over 5 hours. To put that into context, this is longer than the average time it takes to run a marathon or about the time it takes to fly directly from London to Cairo.

Like page views, the amount of time spent with travel content differs by country and travel

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**On average, travellers view 141 pages of travel content in the 45 days prior to booking a trip**

As travellers near their purchase date, page views increase. There are an average of 9 page views on the day leading up to purchase, and an average of 25 page views on the day of purchase.
purchase type. Travellers in the US spend a whopping 524 minutes with travel content, or 8 hours and 44 minutes. Holiday rental guests spend 511 minutes, or 8 hours and 31 minutes, with travel content—significantly longer than the average travel booker.

We then went deeper into the time spent with each online resource—or website category—specifically focusing on those travellers who used each resource. On average, travellers spent 160 minutes consuming travel content on OTAs, 128 minutes on airline websites and 120 minutes on meta travel websites. While the time spent on hotel and car hire websites was lower overall, those that did use these resources spent upwards of 90 minutes on hotel websites and nearly 60 minutes on car hire websites.

Across all travel website categories, the total amount of time travellers spent with content on desktop was considerably higher than on mobile web (the digital data panel included limited mobile app visibility). This was also true for individual sessions (or visits) since, on average, mobile web sessions lasted about half the time of desktop sessions. This indicates that travellers are doing more of their intensive research on desktop, or that those using mobile web are finding the information they need and making decisions quickly or spending time with mobile apps.

### Time spent with resources used on the path to purchase

For travellers that used the resource, they spent the longest amount of time with OTAs, airline websites and meta travel websites.

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Time Spent (Minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTA</td>
<td>160</td>
</tr>
<tr>
<td>Car hire website</td>
<td>55</td>
</tr>
<tr>
<td>Travel media</td>
<td>23</td>
</tr>
<tr>
<td>Financial services</td>
<td>17</td>
</tr>
<tr>
<td>Destination website</td>
<td>17</td>
</tr>
<tr>
<td>Hotel website</td>
<td>95</td>
</tr>
<tr>
<td>Meta travel website</td>
<td>119</td>
</tr>
<tr>
<td>Airline website</td>
<td>128</td>
</tr>
</tbody>
</table>

Looking at the percentage of travellers that use each resource in the 45 days leading up to their purchase, OTAs are used by most travellers.

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTA</td>
<td>80%</td>
</tr>
<tr>
<td>Search engine</td>
<td>61%</td>
</tr>
<tr>
<td>Social media</td>
<td>58%</td>
</tr>
<tr>
<td>Airline website</td>
<td>54%</td>
</tr>
<tr>
<td>Meta travel website</td>
<td>51%</td>
</tr>
<tr>
<td>Hotel website</td>
<td>36%</td>
</tr>
<tr>
<td>Destination website</td>
<td>12%</td>
</tr>
<tr>
<td>Car hire</td>
<td>11%</td>
</tr>
<tr>
<td>Travel media</td>
<td>10%</td>
</tr>
<tr>
<td>Financial services</td>
<td>8%</td>
</tr>
</tbody>
</table>
The traveller purchase journey

Knowing that the travel shopping journey is complex and multifaceted, we surveyed travellers to more deeply understand key touchpoints, influences, resources and behaviours throughout various stages of the travel booking path, such as inspiration, research, planning and booking.

Through the survey, which asked respondents about a recently booked trip, we found that the average path to purchase or trip consideration window—when a traveller started thinking about a trip to booking—is 71 days, with 33 days in the inspiration phase and 38 days in the research and planning phase. The post-purchase window—the time between booking and taking the trip—is 73 days on average.

The path to purchase length and post-purchase window varies by country and travel type. In Japan, the path to purchase is only 45 days, and travellers are booking much closer to their trip date. This is likely because Japanese travellers are taking much shorter trips that take less time to plan. Business travellers also have a condensed purchase path with 52 days in inspiration and planning phases, and 43 days between booking and starting a trip.

On the other hand, international travellers have a longer path to purchase of 85 days compared to 61 days for domestic trips, and a longer post-purchase window—94 days for international trips compared to 60 days for domestic trips. Holiday rental guests also have a long inspiration and planning window (83 days) and they book their accommodation over three months before starting a trip.

→ With an average path to purchase longer than two months, travel brands have a significant runway to influence traveller booking decisions. However, travellers are using many different resources throughout the path, making it imperative to show up beyond your brand’s owned channels.
A dynamic and complex path to purchase

To better understand engagement opportunities throughout the shopping path and to look beyond the digital panel data, we asked travellers how they use various resources when planning and booking trips. The survey revealed that social media—along with other resources like destination websites, search engines, meta travel websites and OTAs—are used the most for inspiration.

As travellers go through the early research phases and begin to compare options, search engines and meta travel websites jump to the top, followed by destination websites, OTAs and holiday rental websites or apps. Once travellers start to narrow down their options, resource use slowly declines across all categories. Travellers then turn to trusted resources like OTAs and travel providers—including airline, car, hotel, rail, and holiday rental websites and apps—to book travel.
Inspiration

When travellers first start thinking about a trip

The initial spark of inspiration is the first opportunity to influence traveller decisions—a critical 33-day period, according to the survey data. And trip inspiration can come from anywhere. So how can destinations and travel providers ensure that they break through and remain top of mind for travellers at this stage?

The survey revealed that the largest source of inspiration in the initial phase is family, with 37% of travellers inspired to plan a trip after a conversation with a family member. Even with outside influences, the trip destination is often undecided during the inspiration stage. Before selecting where to go on their trip, 59% of travellers did not have a specific destination in mind or considered multiple destinations. More than 80% of travellers from Mexico and 62% of travellers from the UK were undecided on their destination, indicating that these travellers may be even more open to destination inspiration. From the 13% of travellers who considered more than one destination, they considered three different destinations, on average.

The destination indecisiveness among most travellers illustrates opportunities for destinations, as well as travel brands, to inspire and influence travellers early in the booking path, particularly since the path to purchase is more than two months long—and nearly three months long for international trips.

Initial trip inspiration

- 37% Conversation with a family member.
- 24% Routine trip or festive break.
- 24% Specific event or celebration.
- 21% Advertising, social media or other content.
- 17% Conversation with a colleague or friend.

Resources used for trip inspiration

Throughout this early phase, travellers use and draw inspiration from multiple resources.

- Social media: 77%
- Online travel blog/review website: 49%
- Destination website: 45%
- Search engine: 41%
- Meta travel website: 36%
- OTA: 35%
- Holiday rental website/app: 28%

Nearly 3 in 5 travellers did not have a specific destination in mind or considered multiple destinations when they first decided to take a trip

Resource use during the inspiration phase

Throughout this early phase, travellers use and draw inspiration from multiple resources—online and offline. A multi-channel strategy is important to stay top of mind and help influence traveller decisions from the beginning.

From those that use social media in their path to purchase, three quarters use it for inspiration. Across online travel resources, destination websites are the top inspiration resource—followed by meta travel websites and OTAs—among travellers that are turning to these resources during the path to purchase.
When promoting your destination, property or offering, consider combining inspirational social content with discounted rates or promotional deals to make it even more compelling, or use influencers to offer promo links and codes that further sweeten the deal for travellers. Furthermore, leveraging user-generated content in social campaigns may resonate with travellers seeking authentic, trustworthy information from other travellers.

How travellers use social media in the path to purchase

Travellers using social media prior to booking a trip are using it for inspiration and recommendations, as well as viewing content from friends, family and influencers.

- Destination inspiration: 65%
- Lodging recommendations and inspiration: 49%
- Content from friends/family: 41%
- Content from influencers/celebrities: 40%
- Asked for feedback from friends/family: 35%
- Looked for trip deals: 27%
- Used links/codes from influencers: 18%
- Read articles/blogs: 15%
- Shared ideas with trip companions: 14%

Advertising impact and influence

Travel advertising can also be extremely influential, especially at the start of the travel shopping journey. On average, nearly one in five (19%) travellers said that advertising influenced their decision to book a trip. This number was highest among travellers from Mexico at 40%. Holiday rental guests (26%) and hotel guests (22%) are also more likely than average to be influenced by advertising.

Among those, more than two thirds (67%) of travellers recall noticing an influential ad during the inspiration phase, one third (39%) during the middle of the shopping journey and 7% late in the process, shortly before booking. In particular, travellers from the US are likely to notice influential ads during the inspiration phase (81%), while those in the UK are more likely to notice ads during the consideration and planning phase (47%).

To appeal to travellers’ wallets and their wanderlust in the inspiration phase—as well as throughout the path to purchase—travel advertisers should consider showing breathtaking locations and interesting experiences with compelling deals and clear calls to action to drive travellers further into the funnel.
Research

Early in the process, when travellers are browsing and narrowing down options.

After the inspiration phase, travellers spend an average of 38 days researching and planning their trip. Throughout the research phase, travellers are actively looking at various options, gathering information and narrowing down their choices, using even more resources than during the inspiration phase.

Looking at the top five resources for travel research, among those using these resources, nearly three quarters of travellers used search engines, meta travel websites and social media, followed by destination websites and OTAs. As travellers shop around and compare options, holiday rental, hotel and transportation websites or apps—such as car hire, rail and airline—are also used for research.

To better understand how OTAs and travel websites are used during the path to purchase, we asked travellers about their cross-shopping and research behaviours. After visiting a hotel or airline website or app, about a quarter (24%) of travellers are most likely to visit an OTA next. Then, after visiting an OTA, most travellers (89%) visit another travel website, such as an airline, hotel or meta travel website.

After visiting an OTA, most travellers visited another travel website, such as an airline, hotel or meta travel website.

Online resources used for trip research

As travellers gather information, shop around and compare options, the use of varied resources spikes and differs by region.

- Australia | Japan
- France | United Kingdom
- Canada | Mexico | United States

![Bar chart showing usage of various resources during travel research](chart.png)
OTAs are used for cross-shopping, regardless of where purchase is made

The digital data shows that most travellers use OTAs in the path to purchase, regardless of where they book.

| % visiting an OTA before any travel purchase | 80% |
| % visiting an OTA before purchase on hotel website | 61% |
| % visiting an OTA before purchase on car hire website | 58% |
| % visiting an OTA before purchase on airline website | 52% |

The digital data shows that most travellers use OTAs for research, regardless of where they book. When looking at those who booked on a hotel website or app, nearly two thirds (61%) visited an OTA during their journey. Similarly, more than half (52%) of customers who booked on an air website, and 58% of customers who booked on a car hire website, visited an OTA.

It is clear that travellers use OTAs to compare options and availability. For example, if they are considering a specific hotel in Tokyo but want to compare accommodation in the area—including rates, availability and amenities—visiting an OTA is an efficient way to find the best option and price for their travel needs.

This speaks to the importance of having a brand presence not just on your owned websites, but across other channels and platforms like OTAs, and ensuring that your rates and inventory are accurate everywhere to stay top of mind with travellers.
Planning

Right before booking, when travellers are considering final options

At the end of the consideration window and prior to booking, travellers move into the planning phase. During this key period, they are mapping out trip details and considering their final options from those identified during the research phase.

Among travellers using these resources, OTAs become the top online resource for travel planning, with meta travel websites close behind. Travellers also use car, hotel and rail websites or apps—as well as holiday rental websites or apps—and social media. This illustrates how travellers are using these online resources to help further narrow their options and lock in key details like location, price, travel dates and activities.

Beyond researching various aspects of their trip, travellers are also considering where and how to book their trip during the planning phase. This could include access to various payment options, such as financing or digital wallets, redeeming loyalty points, availability of travel packages, and even ratings and reviews.

Nearly half (49%) of travellers said that getting the best price is an important factor when deciding where to shop and book their trip (57% in Australia and Canada). Nearly one third (31%) consider their positive previous experience with a travel brand (37% in the US), and 28% look for travel brands that offer flexible cancellation policies or refundable rates.

Online resources used for trip planning

Among travellers using these resources, OTAs are the top online resource for travel planning, with meta travel websites close behind.

- Australia / Japan
- France / United Kingdom
- Canada / Mexico / United States

What travellers look for when choosing where to plan and book

Beyond researching various aspects of their trip, travellers are also considering where and how to book their trip during the planning phase. This could include access to various payment options, such as financing or digital wallets, redeeming loyalty points, availability of travel packages, and even ratings and reviews.

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The most important factors differ slightly when looking at the type of purchase. A positive previous experience and travel ratings and reviews are more important to holiday rental guests, while flight shoppers are more concerned with finding competitive prices.

➔ For travel suppliers, this is an opportunity to highlight features, flexibility and transparency in your messaging and content across the shopping journey.

Important factors when choosing a travel brand to plan and book

Across all purchase types, the most important factors include best prices on travel and an easy-to-use website. However, other important factors differ slightly when looking at the type of travel purchase.
Booking

The final step, when travellers make a purchase.

When asked about their most recent trip, more than half (51%) of travellers booked on an OTA (69% in Japan), 37% booked on an airline website or app and 23% booked on a hotel website or app. It is important to note that some travellers booked multiple trip elements across multiple travel websites. The potential for booking across different websites or resources further emphasises the importance of your brand showing up beyond your own channels.

Nearly four in five travellers (78%) had prior booking experience with the website they booked on, indicating that familiarity is a key booking consideration. More than three quarters (76%) of travellers who booked their trip on an OTA had previously booked travel through an OTA.

From those who booked multiple trip components, 43% booked their flight first—as many as 55% in Australia and 53% in Mexico—while 27% booked a hotel first. Among Japanese travellers who booked multiple trip elements, 52% booked their hotel first.

Digging into booking devices, 59% of travellers used a computer to book an element of their trip, making it the most popular device for booking. Travellers from Canada and the US (69%) are more likely than travellers from other countries to book using a computer.

Nearly one third (32%) of travellers booked on a mobile device using a website and 23% booked using a mobile app—with travellers from Mexico being the most likely to book using a mobile device (39% on mobile web, 36% via mobile app). Among hotel guests, more than one third (34%) booked their trip via mobile web and 25% booked via a mobile app.

⇒ Despite the popularity of desktop booking, maintaining a mobile presence and delivering a seamless mobile experience remains important, especially for hotel guests.

Loyalty considerations

The role of loyalty in travel shopping decisions continues to evolve but remains an important factor in booking decisions. Among travellers who are members of a travel rewards programme, 79% feel that it is important to
8 in 10 travel rewards programme members feel that it is important to book with a brand where they are a loyalty member.

book with a brand where they are a loyalty member—and earn perks like points for future bookings. From those 79%, 17% said that it is extremely important.

Loyalty member travellers are less price conscious and may prioritise brand preference over price. Nearly three in five travellers (58%) said they would be willing to pay more to book with a brand where they are a loyalty member, and this number climbs for travellers booking holiday rentals (65%) and flights (63%). However, their willingness to pay more only goes so far, which indicates that for most loyalty travellers, if travel options with their loyalty programmes are too expensive, they will look into other options.

However, when their preferred travel brand offers them a deal, that is even sweeter: price discounts (73%) and deals for members (56%) are some of the top reasons travel rewards members are interested in loyalty programmes, along with gaining points or rewards for future travel (61%).

Compared to other regions, travellers from Canada and the US are more likely to be interested in earning rewards for future travel and receiving perks or amenity access through their loyalty programmes.

Whether travellers are booking with their preferred OTA, hotel website, airline website or elsewhere, both travel brand loyalty and familiarity influence where travellers choose to book. However, price sensitivity and deals or discounts play a larger role in influencing booking decisions, indicating that travellers are ultimately looking for the option that has the best overall value—both now and in the long run.
Turning insights into action

How to reach and engage travellers throughout today’s path to purchase.

Influence travellers with inspiration and information
Whether it is a social media post, chats with family or an intriguing online promotion, travel inspiration can happen any time and anywhere. Yet after this initial point of inspiration, there is still an opportunity to influence traveller decisions. Showcase aspirational and informative content across advertising, social media and other channels to influence travellers throughout their path to purchase.

Stand out in a crowded landscape
Travellers consume a lot of travel content—141 pages and 303 minutes leading up to booking—to be exact. This provides an opportunity for you to find ways to stand out from the crowd and elevate your content to travellers as they embark on their travel searches. Optimise your content by including amazing visuals such as user-generated content or professional photography, catchy headlines, accurate descriptions, helpful information and competitive rates.

Implement an omnipresent approach
Travellers are using multiple resources throughout the path to purchase, which makes it essential to show up beyond your brand’s owned channels. Explore cross-channel and cross-platform strategies to leverage the power of strategic partnerships to extend your reach and presence.
Travellers turn to OTAs to be inspired, plan, research, comparison shop and book. When it comes to our travel brands, we provide travellers around the world with everything needed throughout the path to purchase for all types of travel, which brings our partners demand. For partners who want to offer their own travel experience to their customers, we extend this same technology to you.

Five in 10 travellers said that getting the best price is an important factor when deciding where to shop and book their trip. When developing your advertising and marketing strategy, consider leading with a promotional discount or offering supported by content that spotlights the uniqueness of your location—or interesting activities—to appeal to travellers.

Nearly 50% of travellers are members of a travel rewards programme, and nearly 3 in 5 of those members would be willing to pay more to book with a brand where they are a member. Promote your loyalty benefits in your content and channels and consider offering exclusive discounts for your loyal travellers.
Methodology

This consumer survey was conducted by Luth Research between 24 March and 19 April 2023, among 5,713 participants 18 years and older across seven markets: Australia, Canada, France, Japan, Mexico, the UK and US, who booked online travel within the last six months.

The behavioural digital study used Luth Research’s ZQ Intelligence passive metering technology and its database of digital behaviours to analyse the travel path to purchase for 70,000+ participants 18 years and older across seven markets: Australia, Canada, France, Japan, Mexico, the UK and US. The digital data panel spanned 12 months and evaluated traveller behaviour and influences in the 45 days leading up to booking a trip, looking across desktop and mobile devices, with limited mobile app visibility. Online visits to relevant travel sites within the past 12 months were identified, and the digital data from 45 days prior to booking was extracted and analysed.

About Expedia Group

Expedia Group, Inc. companies power travel for everyone, everywhere through our global platform. Driven by the core belief that travel is a force for good, we help people experience the world in new ways and build lasting connections. We provide industry-leading technology solutions to fuel partner growth and success, while facilitating memorable experiences for travellers. Our organisation is made up of three pillars: Expedia Product and Technology, focussed on the group’s product and technical strategy and offerings; Expedia Brands, housing all our consumer brands and Expedia for Business, consisting of business-to-business solutions and relationships throughout the travel ecosystem. The Expedia Group family of brands includes Expedia®, Hotels.com®, Expedia® Partner Solutions, Vrbo®, trivago®, Orbitz®, Travelocity®, Hotwire®, Wotif®, ebookers®, CheapTickets®, Expedia Group™ Media Solutions, CarRentals.com™ and Expedia Cruises™.