The path to purchase: uncovering how travellers plan and book online

Key insights: France

With a complex and multifaceted path to purchase, this research unpacks traveller behaviours in the path to purchase, including the main drivers and resources that influence online travel booking decisions.

Luth Research includes French traveller data from:
• 800+ survey respondents.
• A digital data panel with 10.5K members.

French travellers spend about one month thinking about their trip during the initial inspiration phase, and another month researching and planning it (on par with the average). Once they decide on their plans, booking occurs more than two months prior to starting a trip.

Open to destination inspiration

More than 60 percent of travellers did not have a specific destination in mind when they first started thinking about a trip.

Resources used leading up to a travel purchase

- **OTA**: 90%
- **Search engine**: 62%
- **Meta travel website**: 49%
- **Social media**: 49%
- **Airline website**: 36%

Lower content consumption than average in the 45 days before booking

- **81** pages of travel content viewed → versus 141 pages on average.
- **199** minutes spent consuming travel content → versus 303 minutes on average.
Price and easy-to-use websites are top factors when choosing where to plan and book

- 44% Best prices on travel
- 34% Easy-to-use website
- 31% Transparent or no hidden fees
- 29% Personal data is secure
- 27% Positive previous experience
- 27% Flexible cancellation policies

French travellers are more likely to be influenced by advertising

23% of French travellers said that advertising influenced their decision to book a trip versus 19% on average.

French loyalty programme members find it important to book with brands where they are a member

28% of travellers are members of a loyalty programme.

- 79% feel that it is important to book with a brand where they are a loyalty member.
- 51% would pay more to book with a brand where they are a loyalty member.

Top reasons why French travellers are interested in loyalty programmes

- 71% Price discounts.
- 56% Complimentary upgrades.
- 54% Member deals.

What they find most influential:

- 53% Beautiful images
- 43% Promotions or deals
- 39% Content highlighting interesting experiences
- 39% Inspirational content

Top takeaways

Reaching travellers through advertising

Travel advertising can play an important role for French travellers during the early shopping phase. Consider leading with deals and promotions supported by compelling images or inspirational content to broaden traveller appeal.

Seeking destination inspiration

Many French travellers do not have a particular destination in mind or consider multiple destinations prior to choosing where to go—highlighting the opportunity to offer destination inspiration in the planning and research phase.

OTAs are not only for booking

French travellers—more so than the average—turn to OTAs to be inspired and to plan, research 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.
The path to purchase: uncovering how travellers plan and book online

Key insights: Japan

With a complex and multifaceted path to purchase, this research unpacks traveller behaviours in the path to purchase, including the main drivers and resources that influence online travel booking decisions.

The path to purchase for Japanese travellers is 45 days, considerably shorter than the average of 71 days. Travellers only spend a few weeks thinking about their trip and take under a month to plan it. There is a window of six weeks between booking and starting a trip, which is also shorter than the average of 73 days.

More likely to be set on a destination

62 percent of travellers had only one destination in mind when they decided to take a trip and did not consider other destinations.

Resources used leading up to a travel purchase

- OTA: 90%
- Social media: 58%
- Meta travel website: 47%
- Airline website: 46%
- Search engine: 41%

High content consumers over the 45 days before booking

- 208 pages of travel content viewed
- 398 minutes spent consuming travel content

Luth Research includes Japanese traveller data from:
- 800+ survey respondents.
- A digital data panel with 7,300 members.
Easy-to-use websites and price are top factors when choosing where to plan and book

- Easy-to-use website: 35%
- Best prices on travel: 30%
- Transparent or no hidden fees: 27%
- Payment options: 24%
- Positive previous experience: 23%

Japanese travellers are more likely to be influenced by advertising

- 26% of travellers said that advertising influenced their decision to book a trip (versus 19% on average).
- 59% said that beautiful imagery was the most influential aspect of travel advertising (versus 52% on average).

Japan has the lowest percentage of loyalty programme members, but a strong opportunity for growth

- 25% of travellers are members of a loyalty programme.

↑ Of those members:
- 73% feel that it is important to book with a brand where they are a loyalty member.
- 65% would pay more to book with a brand where they are a loyalty member.

Top reasons why Japanese travellers are interested in loyalty programmes

- 71% Price discounts.
- 57% Gaining points or cash rewards for future travel.
- 54% Complimentary upgrades.

Top takeaways

Stand out in a crowded landscape

Although the path to purchase is shorter for Japanese travellers, they consume a high volume of content and spend a lot of time with it leading up to booking. Find ways to stand out from the competition and elevate your content to make your travel brand a top contender.

OTAs are not only for booking

Japanese travellers—more so than the average—turn to OTAs to be inspired, plan, research 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.

Reach travellers through advertising

Travel advertising can play an important role for Japanese travellers during the early shopping phase. Consider leading with compelling images and inspirational content that highlight interesting experiences to appeal to Japanese travellers.
With a complex and multifaceted path to purchase, this research unpacks traveller behaviours in the path to purchase, including the main drivers and resources that influence online travel booking decisions. Luth Research includes Mexican traveller data from:
- 800+ survey respondents.
- A digital data panel with 5,200 members.

**Mexican travellers spend over a month thinking about their trip and another month planning it, comparable to the average. Booking occurs over two months prior to going on their trip, 10 days shorter than the average.**

**Open to destination inspiration**

8 in 10 travellers did not have a specific destination in mind when they first started thinking about a trip.

**Resources used leading up to a travel purchase**

<table>
<thead>
<tr>
<th>Resource</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>OTA</td>
<td>83%</td>
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<tr>
<td>Search engine</td>
<td>60%</td>
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<tr>
<td>Social media</td>
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<td>Airline website</td>
<td>50%</td>
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<td>Meta travel website</td>
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83% of Mexican travellers use OTAs in their path to purchase versus 80% on average.

**Lower content consumption than average in the 45 days before booking**

- **78** pages of travel content viewed versus 141 pages on average.
- **227** minutes spent consuming travel content versus 303 minutes on average.
Price and payment options are most important when deciding where to plan and book

- Best prices on travel: 50%
- Payment options: 41%
- Easy-to-use website: 41%
- Travel ratings and reviews: 36%

Mexican travellers are the most influenced by advertising

- 40% of travellers report being influenced by advertising when deciding to book a trip, versus 19% on average.

Mexican loyalty members are set on booking with their brand memberships

- 39% of travellers are members of a loyalty programme.

  - Of those members:
    - 95% feel that it is important to book with a brand where they are a loyalty member.
    - 78% would pay more to book with a brand where they are a loyalty member.
    - 24% would pay significantly more to book with a brand where they are a loyalty member.

Top reasons why Mexican travellers are interested in loyalty programmes

- 68% Price discounts.
- 60% Perks and amenities.
- 57% Gaining points or cash rewards for future travel.
- 57% Member deals.

Top takeaways

OTAs are not only for booking

OTAs serve a multitude of functions for Mexican travellers during trip planning—from researching to narrowing down options and, finally, for booking. We provide travellers around the world with everything needed throughout the path to purchase for all types of travel, which brings our partners demand.

Price-conscious shoppers

Mexican travellers are more likely to be influenced by advertising, especially ads highlighting promotions, and are most interested in price discounts from a loyalty programme. Consider leading with a deal in your marketing, supported by compelling or inspirational content.

Lean into loyalty

While less than half are members of a loyalty programme, 95% of loyalty members feel that it is important to book with a brand where they are a member—which is more than any other country. Ensure that you are offering discounts, perks and amenities, and points for future travel to connect with loyalty travellers wherever they are booking.
The path to purchase: uncovering how travellers plan and book online

Key insights: United Kingdom

With a complex and multifaceted path to purchase, this research unpacks traveller behaviours in the path to purchase, including the main drivers and resources that influence online travel booking decisions.

Travellers from the UK spend one month thinking about their trip during the initial inspiration phase and over a month researching and planning it, which is aligned with the average. Once they finalise their plans, the window from booking to the start of the trip is over three months, which is longer than the average of 73 days.

Open to destination inspiration

6 in 10 travellers did not have a specific destination in mind or considered multiple destinations.

Resources used leading up to a travel purchase

- OTA: 86%
- Search engine: 64%
- Social media: 55%
- Meta travel website: 53%
- Airline website/app: 51%

Lower content consumption than average in the 45 days before booking

- 88 pages of travel content viewed → versus 141 pages on average.
- 221 minutes spent consuming travel content → versus 303 minutes on average.
Price and easy-to-use websites are top factors when choosing where to plan and book

- **50%** Best prices on travel
- **48%** Easy-to-use website
- **34%** Positive previous experience
- **29%** Transparent or no hidden fees
- **29%** Travel rating and reviews

**22%** of UK travellers who used social media prior to booking a trip, used it for links and codes from influencers (higher than any other country).

UK loyalty members find it important to book with their brand memberships

- **33%** of travellers are members of a loyalty programme.

↑ Of those members:
- **68% feel that it is important to book** with a brand where they are a loyalty member.
- **55% would pay more to book** with a brand where they are a loyalty member.

Top reasons why UK travellers are interested in loyalty programmes

- **76%** Price discounts.
- **58%** Complimentary upgrades.
- **58%** Member deals.

Top takeaways

**Seeking destination inspiration**

Over 60% of UK travellers do not have a specific destination in mind or are considering multiple destinations prior to choosing where to go—highlighting the opportunity to offer destination inspiration at the start of a traveller’s purchase journey.

**OTAs are not only for booking**

UK travellers—more than on average—turn to OTAs for inspiration, planning and research. We provide travellers around the world with everything needed throughout the path to purchase for all types of travel, which brings our partners demand.

**Incorporate deals and incentives**

When deciding where to shop for and book travel, UK travellers value access to the best prices. Within marketing content, consider leading with a deal supported by compelling or inspirational content to ensure that your travel brand stands out.