

The Path To Purchase

Uncovering how travelers plan
and book online

A large stone archway frames a view of a river and city buildings at sunset. The arch is made of dark, textured stone. The river is calm, reflecting the golden light of the setting sun. In the background, there are several buildings and a bridge. A few people are sitting on the stone ledge of the arch, looking out at the water. The overall atmosphere is peaceful and scenic.

05 Overview

08 Travel content consumption

12 The traveler purchase journey

18 Inspiration

24 Research

28 Planning

32 Booking

38 Turning insights into action

42 Methodology
& about Expedia Group



Travel is a force for good

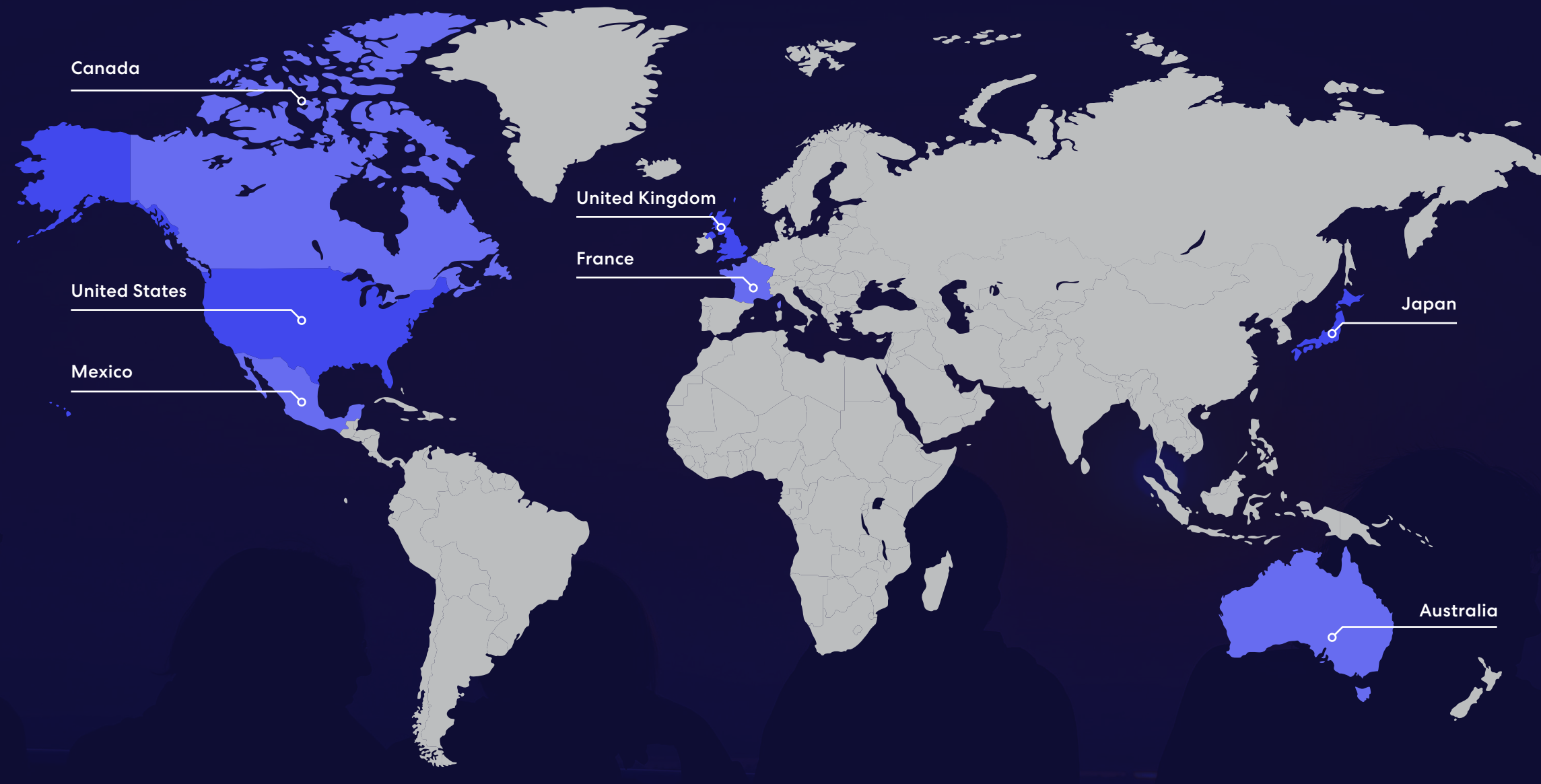
— it broadens horizons, bridges divides, and opens the world. At Expedia Group, we power global travel for everyone, everywhere. This starts with a deep understanding of travelers across the globe. To do that, we draw from our wealth of trip search and booking data, encompassing the 6.5 million visitors on average to our traveler 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 traveler path to purchase. The digital landscape and travel industry are increasingly fragmented, online content consumption continues to rise, and the touchpoints for traveler 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 yourself want to know: What inspires travelers to take a trip? How much time

are travelers spending with online travel content, and what is influencing traveler 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 traveler path to purchase, we partnered with Luth Research to conduct a digital study and consumer survey in seven countries around the world: Australia, Canada, France, Japan, Mexico, and the U.K. and U.S.

The aggregated research findings reveal traveler preferences and behaviors 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 travelers during their path to purchase.



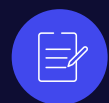
The path to purchase study includes:



Digital Data

Luth digital data tracked and evaluated traveler behavior in the 45 days before a trip booking

- 70,000+ digital data panel
- Based on those who booked travel in 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 in the past 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)
- Vacation rentals (e.g., Airbnb, Vrbo, Vacasa)

Note: In the digital study, vacation rentals are included in the OTA resource category. In the consumer survey, OTAs and vacation 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 travelers' complex online behavior leading up to a travel purchase, insights from the digital data panel provided a quantitative view of how much and what type of content travelers interact with throughout the booking journey.

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

When looking at the aggregate, in the early stages of planning, research is more spread out and inconsistent, with approximately



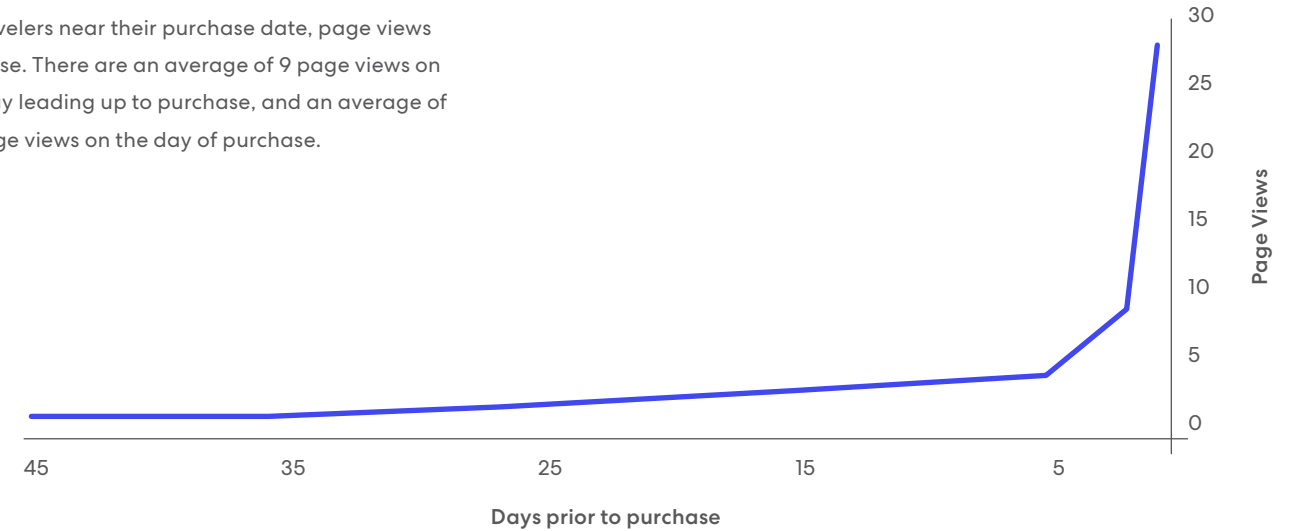
2.5 page views per day. As travelers near their purchase date, page views increase slightly and then increase exponentially in the few days prior to a booking, ending with 25 page views on the day of purchase.

The page views span content across various website categories with online travel agencies (OTAs) accounting for



Average number of page views per day

As travelers 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.



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

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 travelers 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 travelers.

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

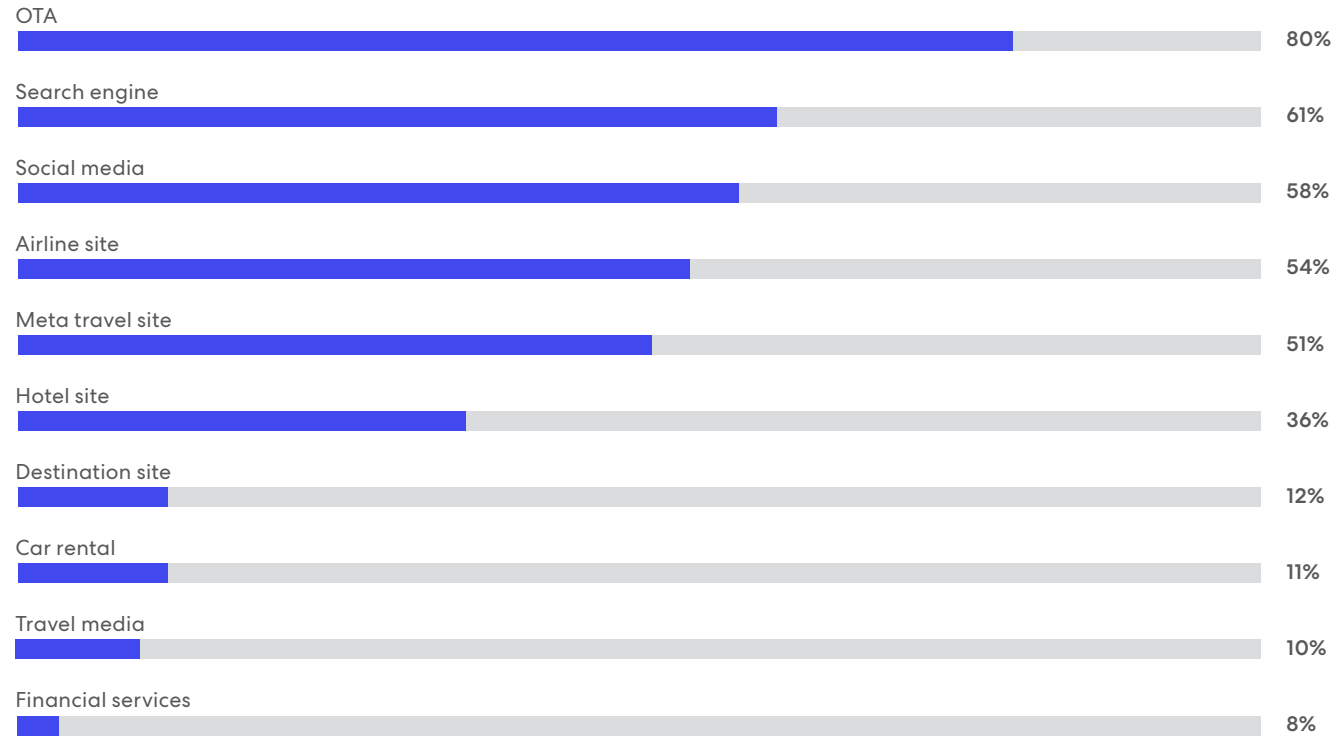
Travelers spend an extensive amount of time with travel content during the 45 days prior to booking — 303 minutes on average, or just over 5 hours. To put that in context, this is longer than the average time it takes to run a marathon or about the time it takes to fly direct from Toronto to Mexico City.

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



Resources used leading up to a travel purchase

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



purchase type. Travelers in the U.S. spend a whopping 524 minutes with travel content, or 8 hours and 44 minutes. Vacation 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 — and specifically those travelers who used each resource. On average, travelers 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 rental websites was lower overall, those that did use these resources spent upwards of 90 minutes on hotel websites and nearly 60 minutes on car rental websites.

Across all travel website categories, the total amount of time travelers spent with content on desktop was considerably higher than on mobile web (the digital data panel included

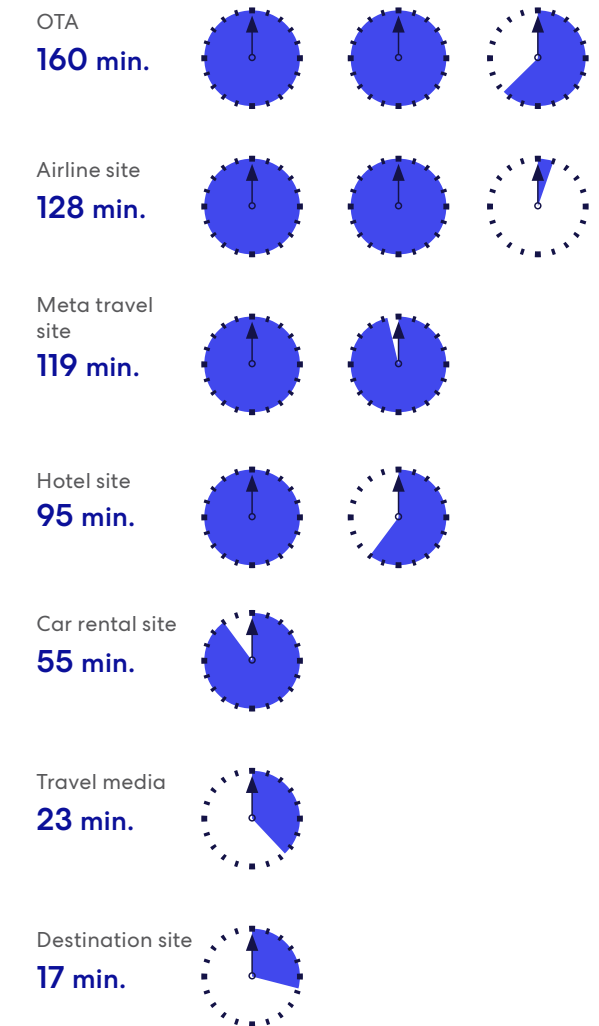


On average, travelers consume 303 minutes of travel content in the 45 days prior to booking a trip



Time spent with resources used on the path to purchase

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



limited mobile app visibility). This was also true for individual sessions (or visits), as on average, mobile web sessions lasted about half the time of desktop sessions. This indicates that travelers 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.

The traveler purchase journey

Knowing that the travel shopping journey is complex and multifaceted, we surveyed travelers to more deeply understand key touchpoints, influences, resources, and behaviors throughout various stages of the travel booking path: 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 traveler 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 travelers are booking much closer to their trip date. This is likely because

Japanese travelers are taking much shorter trips that take less time to plan. Business travelers also have a condensed purchase path with 52 days in inspiration and planning phases and 43 days between booking and trip start.

On the other hand, international travelers 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. Vacation rental guests also have a long inspiration and planning window (83 days) and they book their accommodations over three months before trip start.

→ **With an average path to purchase more than two months long, travel brands have a significant runway to influence traveler booking decisions. But travelers are using many different resources throughout the path, making it imperative to show up beyond your brand's owned channels.**



Travel purchase journey length

The average trip consideration window — when a traveler started thinking about a trip to booking — is 71 days (33 in inspiration, 38 in research and planning). The post-purchase window — the time between booking and taking the trip — is 73 days on average.

33 days



Inspiration

When travelers first start thinking about a trip

38 days



Research

Early in the process, when travelers are browsing and narrowing options



Planning

Right before booking, when travelers are considering final options



Booking

Final step, when travelers make a purchase

73 days



Post purchase

The time between booking and taking the trip



With an average path to purchase more than two months long, travel brands have a significant runway to influence traveler booking decisions

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 travelers 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 travelers 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 vacation rental

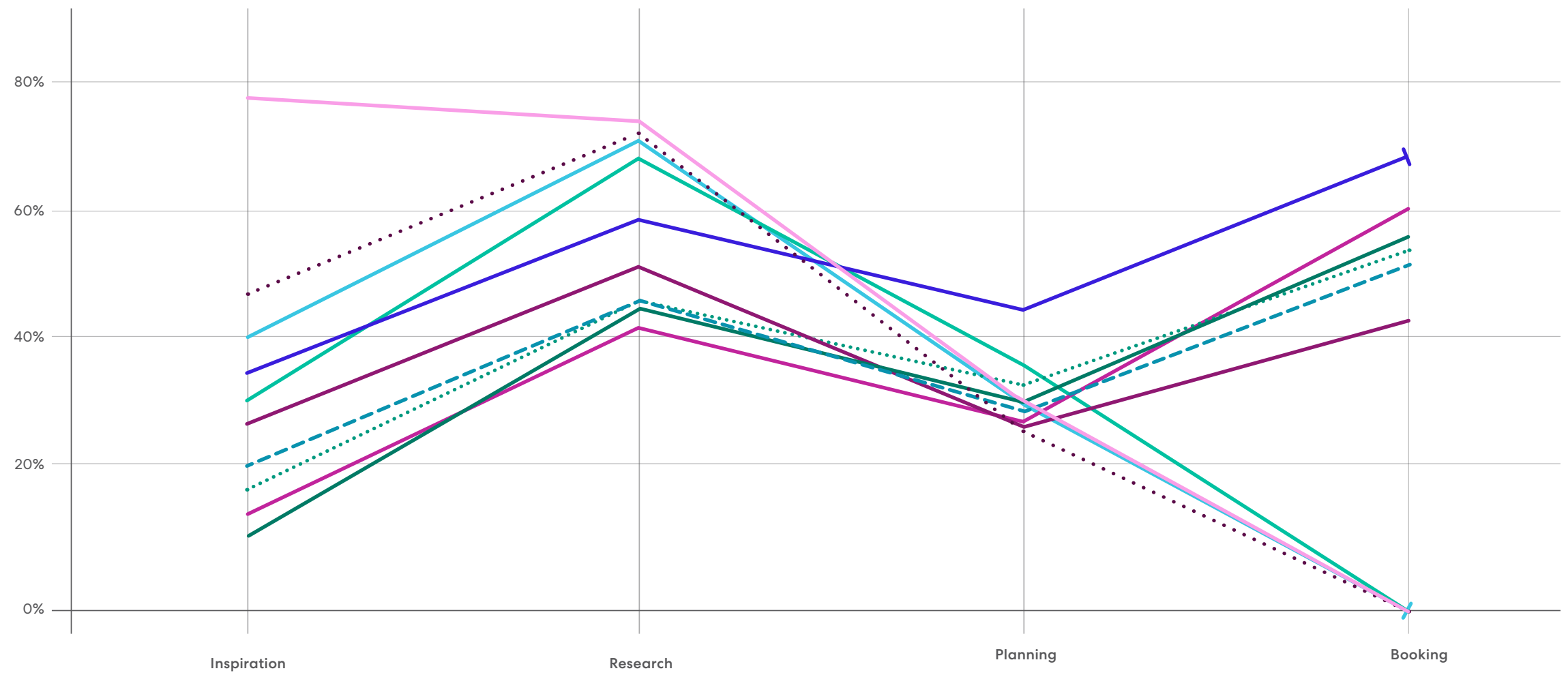
websites or apps. Once travelers start to narrow their options, resource use slowly declines across all categories. Travelers then turn to trusted resources including OTAs and travel providers — including airline, car, hotel, rail, and vacation rental websites and apps — to book travel.



Resources used throughout the travel path to purchase

Travelers use a variety of resources throughout the path to purchase, but turn to different resources for different phases of the journey.

- Social media
- Destination site
- Search engine
- OTA
- Meta travel site
- Vacation rental site/app
- Rail site/app
- Hotel site/app
- Airline site/app
- Car rental site/app





Inspiration

When travelers first start thinking about a trip

The initial spark of inspiration is the first opportunity to influence traveler 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 travelers at this stage?

The survey revealed that the largest source of inspiration in the initial phase is family, with 37% of travelers 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 travelers did

not have a specific destination in mind or considered multiple destinations. More than 80% of travelers from Mexico and 62% of travelers from the U.K. were undecided on their destination, indicating that these travelers may be even more open to destination inspiration. Of the 13% of travelers who considered more than one destination, they considered three different destinations, on average.

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



Initial trip inspiration



37%

Conversation with family member



24%

Routine trip or holiday break



24%

Specific event or celebration



21%

Advertising, social media, or other content



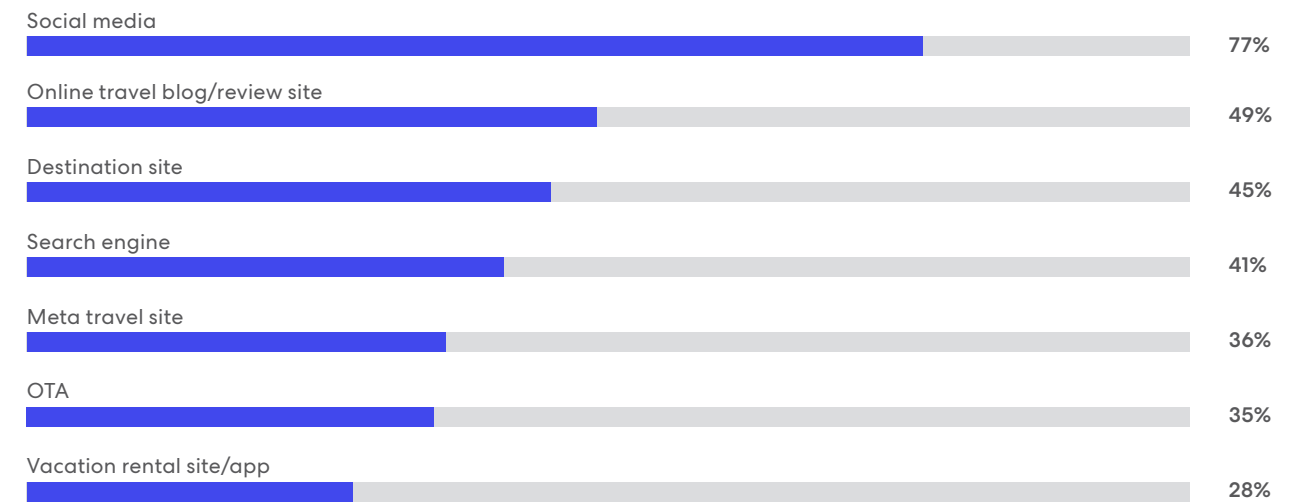
17%

Conversation with a co-worker or friend



Resources used for trip inspiration

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



Nearly 3 in 5 travelers 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, travelers use and draw inspiration from multiple resources, online and offline. A multi-channel strategy is important to stay top of mind and help influence traveler decisions from the beginning.

Of those that use social media in their path to purchase, three-fourths use it for inspiration. Across online travel resources, destination websites are the top inspiration resource, followed by meta travel websites and OTAs, among those that are turning to these resources during the path to purchase.

The role of social media

Travelers using social media prior to booking a trip are using it for inspiration and recommendations, and Instagram, Facebook, and YouTube are the top three social media platforms used throughout the planning process.

Travelers want real examples of other people's experiences as well as their reviews or feedback on a specific hotel, activity, or destination, and social media is an effective platform for sharing and consuming those

authentic stories. They turn to social media to look for destination inspiration, lodging recommendations, and inspiration, and to view travel content, look for trip deals, and more.

→ **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 travelers. Furthermore, leveraging user-generated content in social campaigns may resonate with travelers seeking authentic, trustworthy information from other travelers.**

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%) travelers said advertising influenced their decision to book a trip. This number was highest among travelers from Mexico at 40%. Vacation 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 travelers 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. Travelers from the U.S. are particularly likely to notice influential ads during the inspiration phase (81%), while those in the U.K. are more likely to notice ads during the consideration and planning phase (47%).

→ **To appeal to travelers' 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 travelers further into the funnel.**



Influential aspects of advertising



52%
Beautiful images



46%
Promotions or ideas

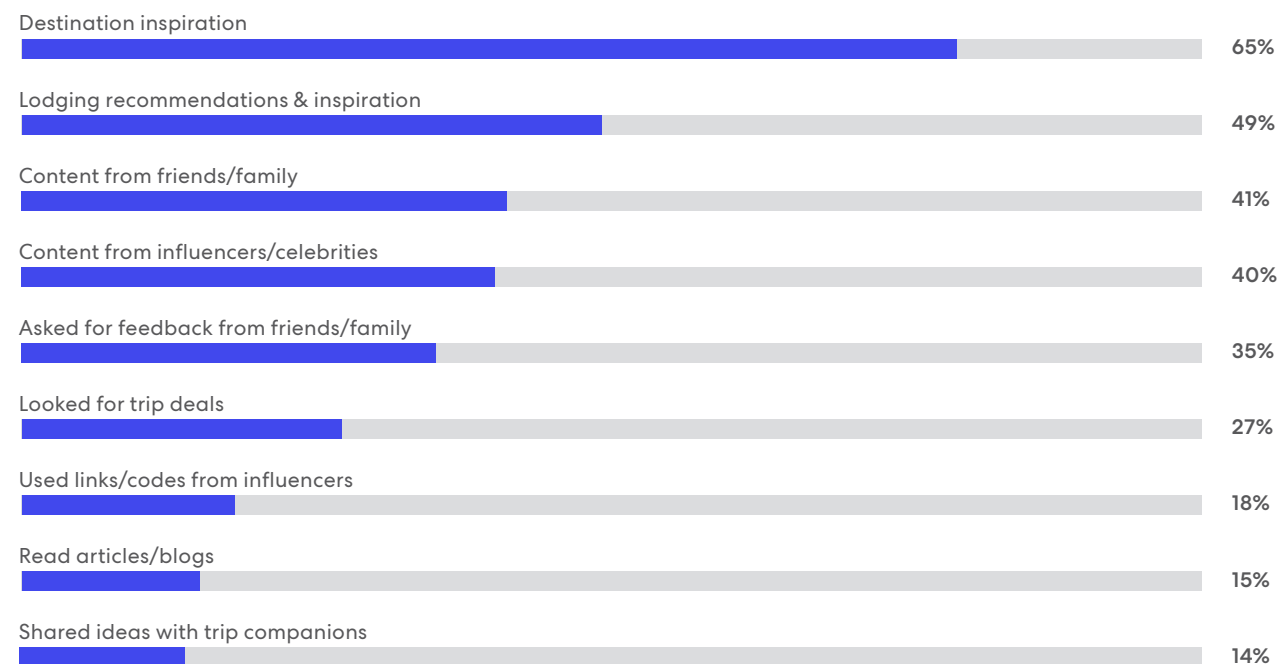


41%
Content highlighting interesting experiences



How travelers use social media in the path to purchase

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





Research

Early in the process, when travelers are browsing and narrowing options

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

Looking at the top five resources for travel research, among those using the resources, nearly three-fourths of travelers used search engines, meta travel websites and social

media, followed by destination websites and OTAs. As travelers shop around and compare options, vacation rental, hotel, and transportation websites or apps, such as car rental, rail, and airline are also utilized for research.

To better understand how OTAs and travel websites are used during the path to purchase, we asked travelers about their cross shopping and research behaviors. After visiting a hotel or airline website or app, about a quarter (24%)

of travelers are most likely to visit an OTA next. And, after visiting an OTA, most travelers (89%) visit another travel website, such as an airline, hotel, or meta travel website.

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



Online resources used for trip research

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

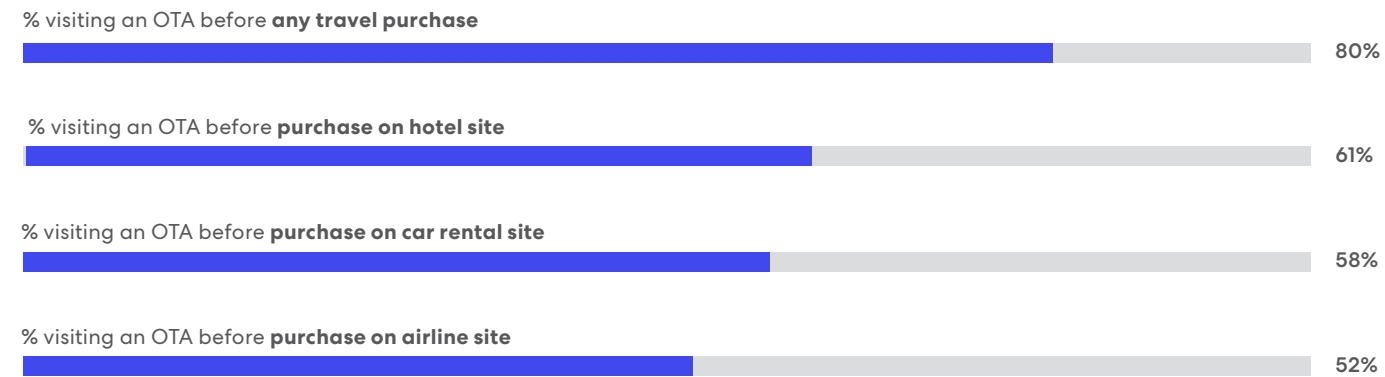
- Australia | Japan
- France | United Kingdom
- Canada | Mexico | United States





OTAs are used for cross shopping regardless of where purchase is made

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



The digital data shows that most travelers 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 rental website visited an OTA.

It's clear that travelers use OTAs to compare options and availability. For example, if they are considering a specific hotel in Tokyo but want to compare accommodations 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 your rates and inventory are accurate everywhere to stay top of mind with travelers.



Planning

Right before booking, when travelers are considering final options

At the end of the consideration window and prior to booking, travelers 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 travelers using the resources, OTAs become the top online resource for travel planning, with meta travel websites close behind. Travelers also use car, hotel, and rail websites or apps, as well as vacation rental websites or apps, and social media. This

illustrates how travelers are using these online resources to help further narrow their options and lock in key details like location, price, travel dates, and activities.

What travelers look for when choosing where to plan and book

Beyond researching various aspects of their trip, travelers 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.

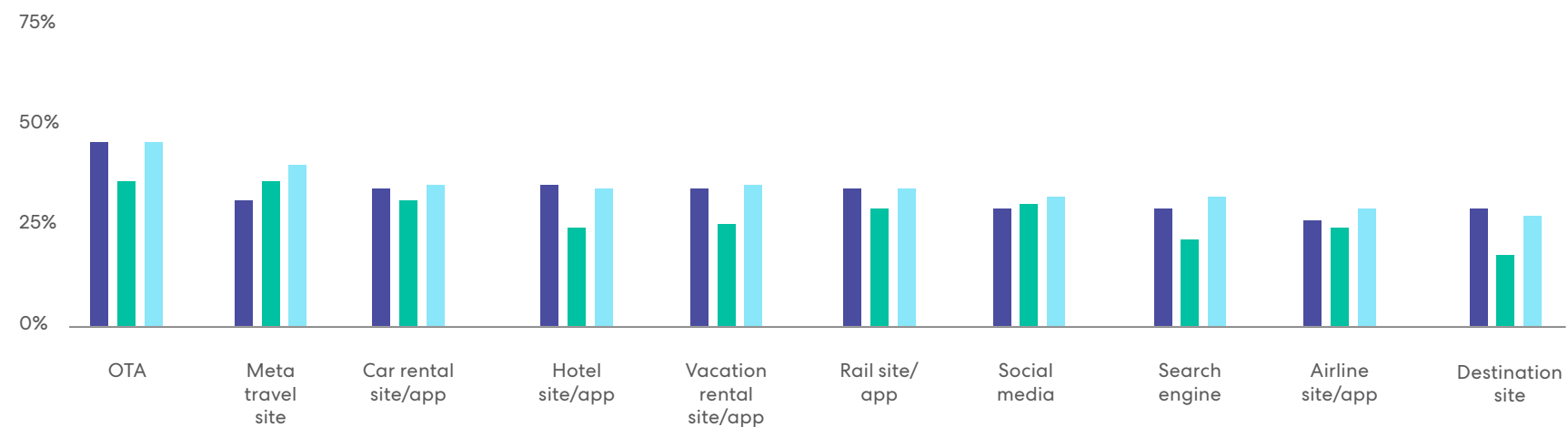
Nearly half (49%) of travelers said getting the best price is an important factor when deciding where to shop and book their trip (57% in Australia and Canada). Nearly one-third (31%) consider their positive previous experience with a travel brand (37% in the U.S.), and 28% look for travel brands that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



Online resources used for trip planning

Among travelers using the 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



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 vacation rental guests, while flight shoppers are more concerned with finding competitive prices.

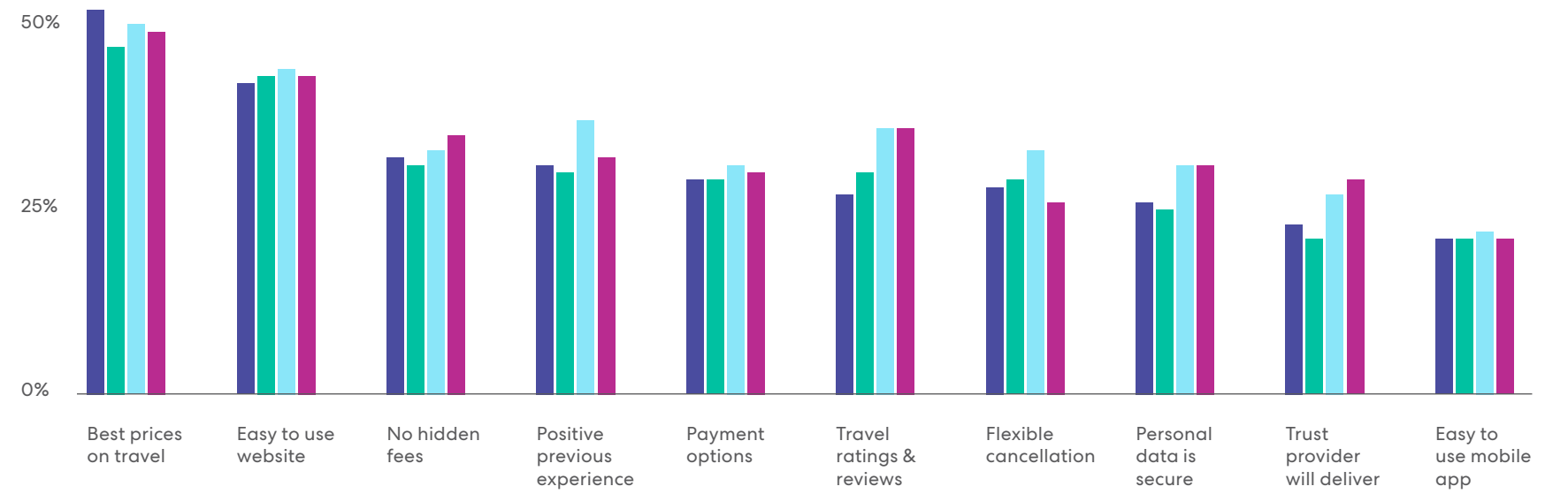
→ For travel suppliers, this is an opportunity to highlight features, flexibility, and transparency in your messaging and content across the shopping journey.



Important factors in 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.

- Air
- Hotel
- Vacation rental
- Package



Booking

Final step, when travelers make a purchase

When asked about their most recent trip, more than half (51%) of travelers 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's important to note that some travelers booked multiple trip elements across multiple travel websites. The potential for booking across different websites or resources further emphasizes the importance of your brand showing up beyond your owned channels.



Where travelers made a travel purchase for their most recent trip



51%
OTA



37%
Airline
site/app



23%
Hotel
site/app



13%
Vacation
rental
site/app

Nearly four in five travelers (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 travelers who booked their trip on an OTA had previously booked travel through an OTA.

Of 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 travelers who booked multiple trip elements, 52% booked their hotel first.

→ For hotel and airline providers, strategic partnerships and promotions with other travel providers can help attract incremental travelers.

Digging into booking devices, 59% of travelers used a computer to book an element of their trip, making it the most popular device for booking. Travelers from Canada and the U.S.

(69%) are more likely than travelers from other countries to book using a computer.

Nearly one-third (32%) of travelers booked on a mobile device using a website and 23% booked using a mobile app, with travelers 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 travelers who are members of a travel rewards program, 79% feel it's important to book with a

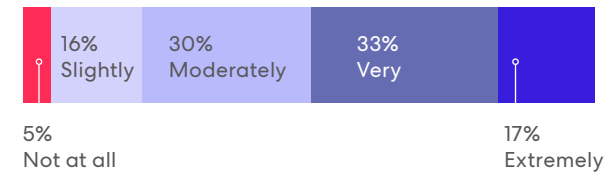




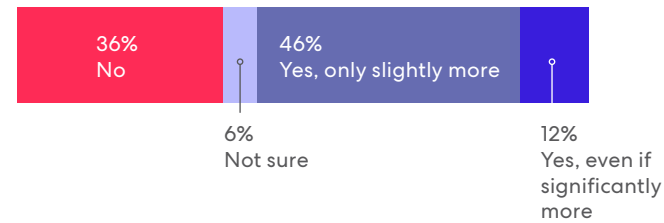
Travel rewards membership considerations

Loyalty members find it important to book with their memberships and are often willing to pay more to prioritize brand preference.

Importance of booking with membership



Willingness to pay more to book with membership



brand where they're a loyalty member and earn perks like points for future bookings. Of those 79%, 17% said it's extremely important.

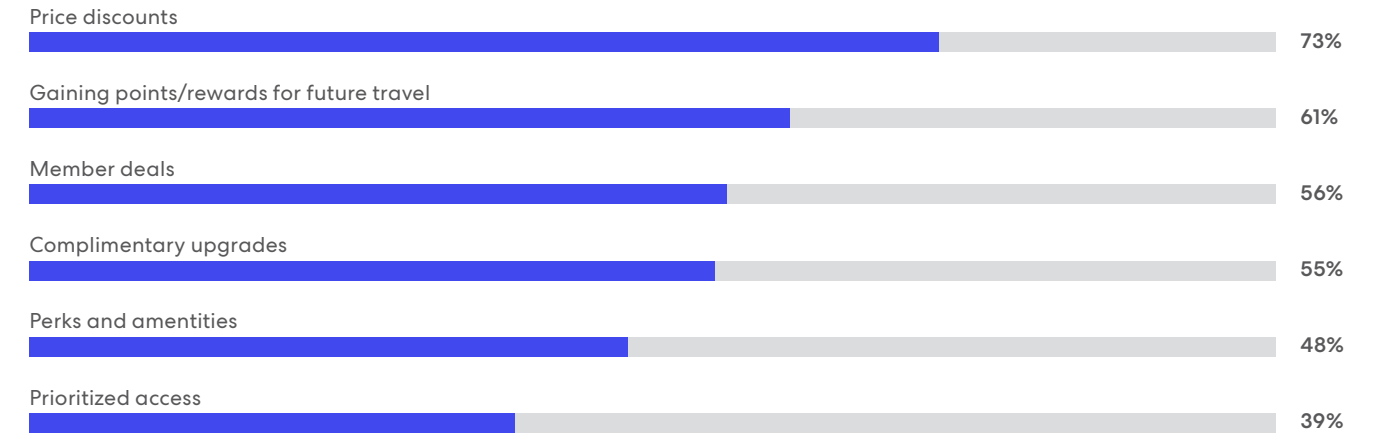
Loyalty member travelers are less price conscious and may prioritize brand preference over price. Nearly three in five travelers (58%) said they would be willing to

8 in 10 travel rewards program members feel it's important to book with a brand where they're a loyalty member



Interest in loyalty program features

Loyalty members are most interested in price discounts and gaining points and rewards for future travel.



pay more to book with a brand where they are a loyalty member, and this number climbs for travelers booking vacation rentals (65%) and flights (63%). However, their willingness to pay more only goes so far, which indicates that for most loyalty travelers, if travel options with their loyalty programs are too expensive, they will look to other options.

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

to other regions, travelers from Canada and the U.S. are more likely to be interested in earning rewards for future travel and receiving perks or amenity access through their loyalty programs.

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



13

Turning insights into action

How to reach and engage travelers throughout today's path to purchase



Influence travelers with inspiration and information

Whether it's a social media post, chats with family, or an intriguing online promotion, travel inspiration can happen anytime and anywhere. Yet after this initial point of inspiration, there's still opportunity to influence traveler decisions. Showcase aspirational and informative content across advertising, social media, and other channels to influence travelers throughout their path to purchase.



Stand out in a crowded landscape

Travelers 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 travelers as they embark on their travel searches. Optimize 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

Travelers 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.



OTAs are for more than booking

Travelers turn to OTAs to be inspired, plan, research, comparison shop, and book. When it comes to our travel brands, we provide travelers 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.



Incorporate deals and incentives

Five in 10 travelers said 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 travelers.



Lean in to loyalty

Nearly 50% of travelers are members of a travel rewards program, 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 travelers.



Methodology

This consumer survey was conducted by [Luth Research](#) between March 24–April 19, 2023, among 5,713 participants 18 years and older in seven markets: Australia, Canada, France, Japan, Mexico, and the U.K. and U.S. who booked online travel within the last six months.

The behavioral digital study used Luth Research's ZQ Intelligence passive metering technology and its database of digital behaviors to analyze the travel path to purchase for 70,000+ participants 18 years and older in seven markets: Australia, Canada, France, Japan, Mexico, and the U.K. and U.S. The digital data panel spanned 12 months and evaluated traveler behavior 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 analyzed.

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 travelers. Our organization is made up of three pillars: Expedia Product & Technology, focused 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™.



